Table of Contents

eSignatures Quick Start Guide

Welcome to the **eSignatures Quick Start Guides**!

Make sure to select your correct eSignatures version:

- eSignatures 5.5.x
- eSignatures 6.x.x

eSignatures 5.5.x - Quick Start Guide

Welcome to the **eSignatures 5.5.x Quick Start Guide**!

The goal of this documentation is two-fold:

- Walk you through the different steps you should take as **admin** to set up your eSignatures platform correctly.
- Explain first-time use.

Once you've received your activation mail, please go through the steps as listed below:

Configure your environment

1. Configure your SMTP server
2. Customize your notifications
3. Rebrand your platform
4. Configure Silverfin connector (Optional)
5. Configure Salesforce connector (Optional)

First-time use

1. Check your profile data
2. Manage user access
3. Create your contacts
4. Upload your first documents

Configure the environment

The next chapters detail the technical configuration of the eSignatures platform.

Note that it is not mandatory to perform these steps, but it will allow you to personalize the platform further.

Click **here** to start.

---

1. Configure your SMTP server

eSignatures sends notifications to users each time they need to take action or when their document status changes.

By default, we use the mailbox no-reply@connective.eu, but we could make use of the mail server of your company. For eSignatures to be able to send those notifications through your mail sever, make sure your SMTP server is configured correctly.

If you're a hosted customer, we configure the SMTP server for you. Please send the following information to service@connective.eu:

- From address
- Hostname
- Port (default 587 or 25)
- Whether TLS is required (recommended)
- Credentials to access the SMTP (if required) Note: please disable the option "Reset password at first login"

Example data for Office365:

DATA	EXAMPLE VALUES
From address	esignatures@yourdomain.be
Username	esignatures@yourdomain.be
Password	YourPassword
Hostname	smtp.office365.com
Port	587, TLS required

Click **Next** to go to the next step.

2. Customize your notifications

eSignatures sends notifications to users each time they need to take action or when their document status changes.

Each type of notification has default content but can be customized for your organization.

If you’re a hosted customer, contact service@connective.eu so we can guide you through the process.

If you're an on-premise customer, see **Connective - eSignatures 5.5.x - Installation Documentation - Limited Public - OP** for more info on how to customize your notifications.

Click **Next** to go to the next step.

---

3. Rebrand your platform

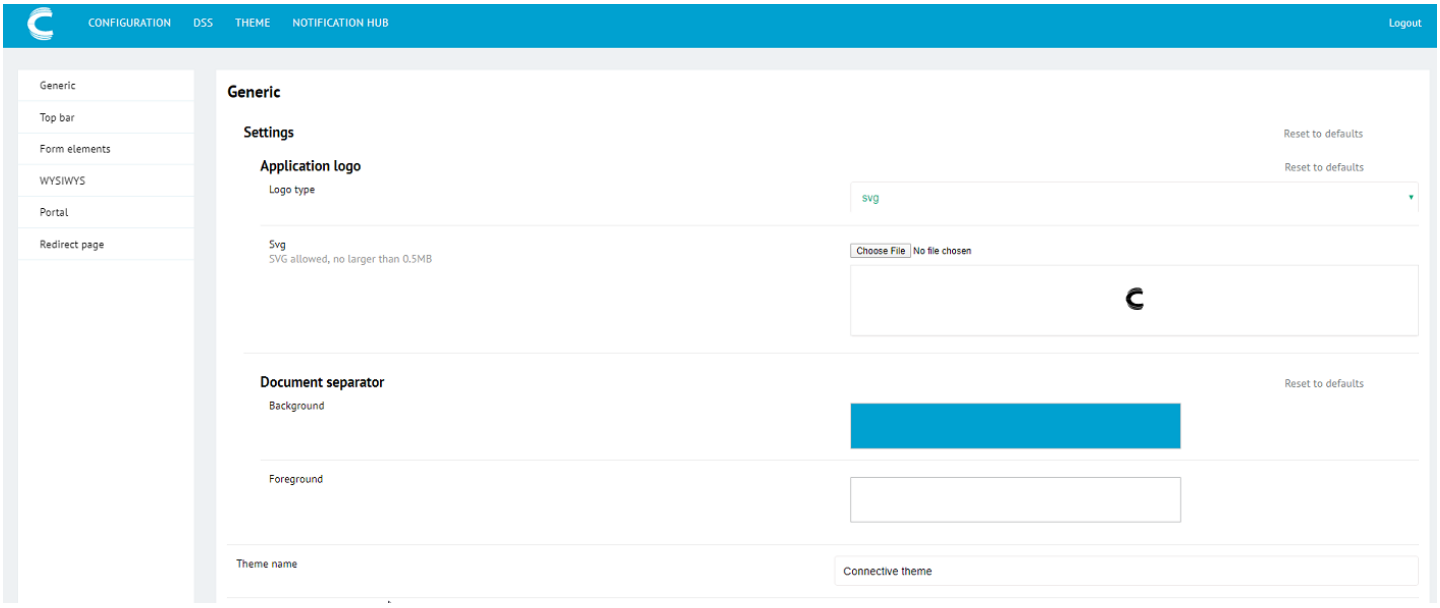
You can rebrand and customize the entire look and feel of your eSignatures platform to suit your corporate identity.

You can do so by by creating new themes in the **Theme** section of the Configuration Index. Please note that the Configuration Index is a separate configuration page and is not part of the eSignatures WebPortal. Consequently, different credentials are needed to access it.

Themes can be applied on a general level to the entire platform, but also to specific document groups or even specific packages.

For detailed information on how to create and apply themes, see the latest **Branding Documentation**.

Contact service@connective.eu in case you didn't obtain your configuration credentials yet.



Click **Next** to go to the next step.

---

4. API integration

It is possible to use the eSignatures REST API to integrate eSignatures to a driving application

Detailed information can be found here: API Documentation

Contact service@connective.eu to receive the API endpoint and credentials.

Click **Next** to go to the next step.

---

5. Configure Silverfin connector

eSignatures allows for an integration towards Silverfin.

Detailed information can be found here: Silverfin

To activate the Silverfin connection, contact service@connective.eu.

Click **Next** to go to the next step.

---

6. Configure Salesforce connector

eSignatures allows for an integration towards Salesforce.

Detailed information can be found here: Salesforce

To activate the Salesforce connection, contact service@connective.eu.

You can now Start with the First Time Use.

First Time Use

Now that the environment has been configured, we will walk you through the different steps before you can send your first document for signing.

Click **here** to start.

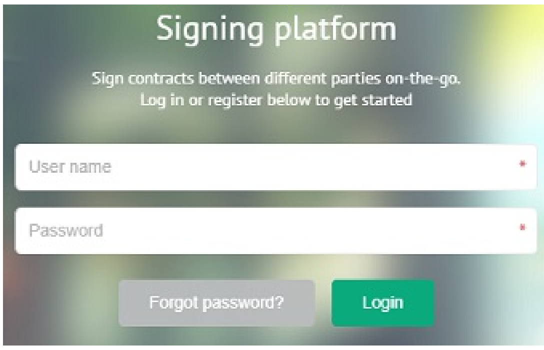
---

1. Check your profile data

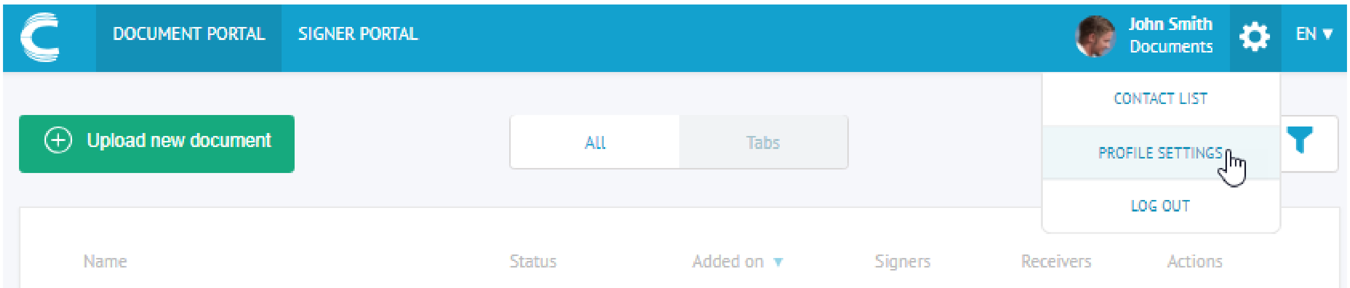
We've created an **admin profile** for you when we created your eSignatures account. The data we've added to your profile impacts users' eSignatures experience, so please make sure the data is correct.

To check your profile data:

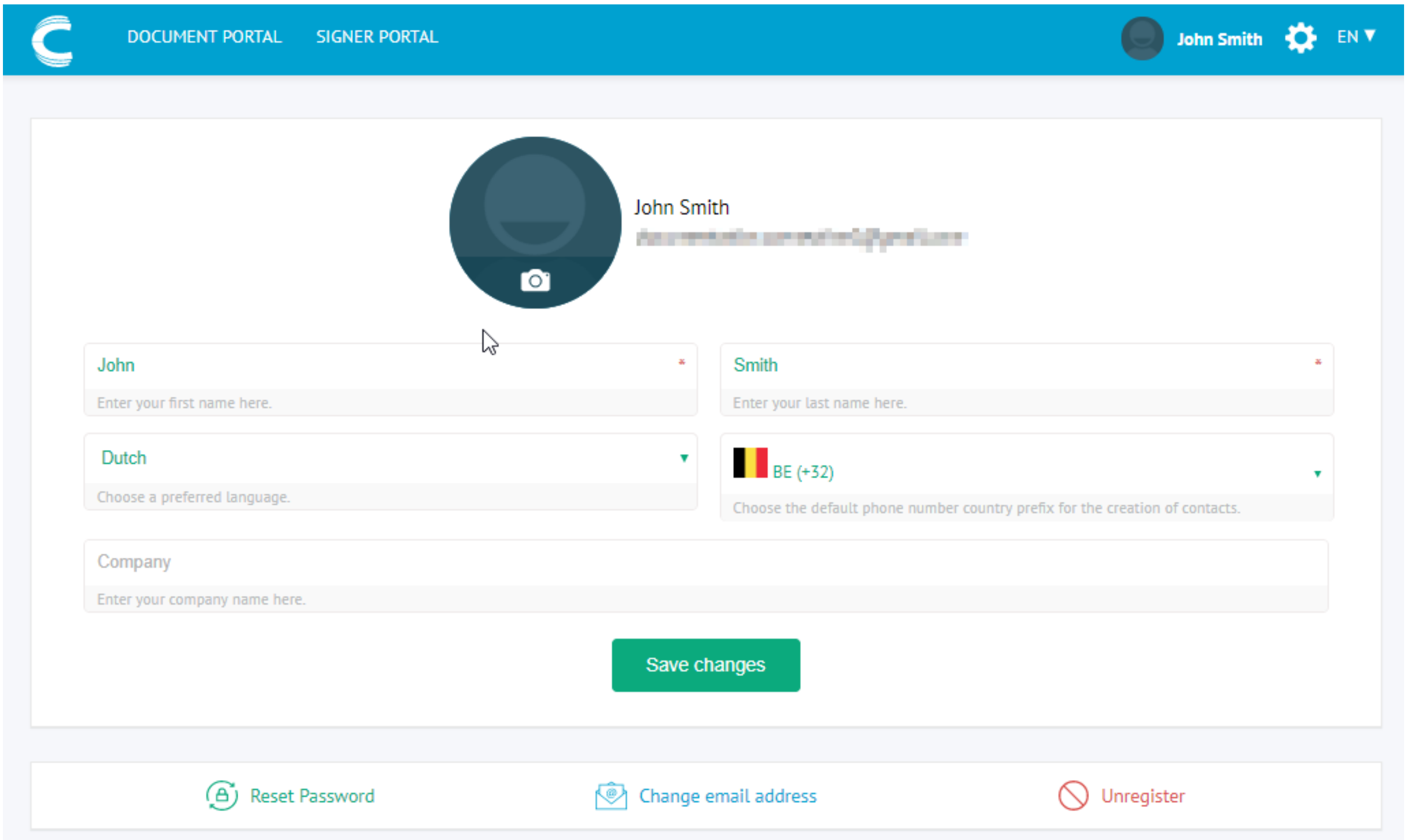
- Click the link in your onboarding mail to access eSignatures.
    - Enter your email address in the **User name** field.
    - Enter the password you've chosen during activation.



- Click the settings icon in the top toolbar and click **Profile Settings**.



- Check if the data is correct.
    - Your first name and last name are mentioned in the notifications sent to users. This only applies to packages sent from your account of course.
    - The preferred language will be the default language of every new contact you create, and of each package you upload.
    - The phone number country prefix will be the default prefix for every new contact you create.



Click **Next** to go to the next step.

2. Manage user access

You can now start creating users and manage their permissions.

Please note that permissions are not managed on user level, but on *user group* level. This way, you don't have to configure permissions for each user individually, which would be very time-consuming and impractical. So, think carefully about which types of permission sets you will require and create user groups accordingly. Then, create individual users and add them to the right user group. Lastly, create *documents groups* the user groups should have access to. By sharing documents groups, users can collaborate on documents uploaded to document groups they can access. Note that if you don't configure documents groups, all documents a user uploads are sent to their personal MyDocuments folder, which only they can access.

- Create and configure user groups
- Create users and add them to a user group
- Create document groups

Click **Next** to go to the next step.

2.1 Create and configure user groups

Think carefully about which types of permission sets you will require and create user groups accordingly.

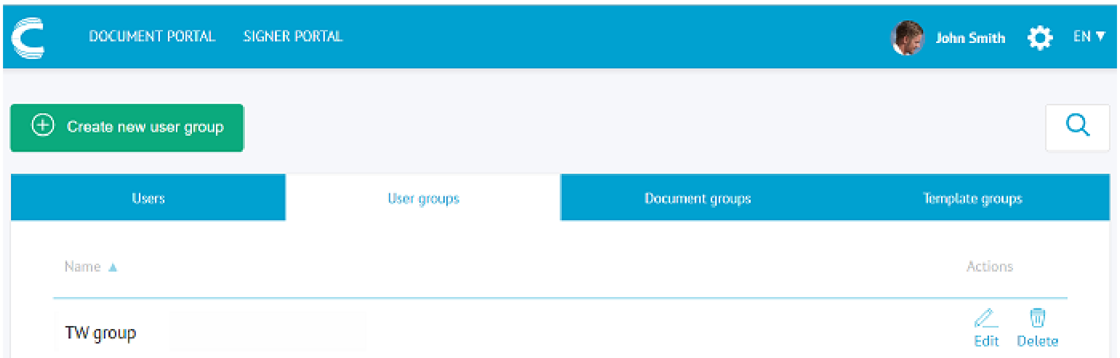
For instance, some users might only need to sign documents and therefore only need access to the Signer Portal. Others will only send documents and only need access to the Document Portal. Still others will need access to both.

Important:

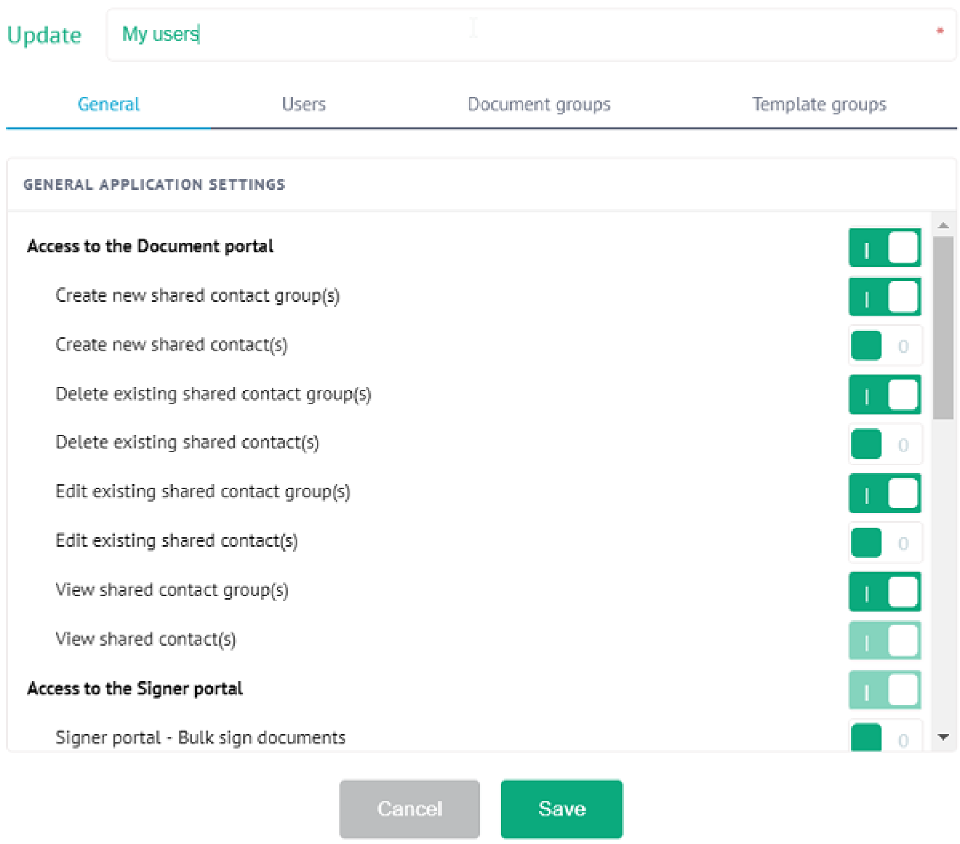
- Never rename or modify the permissions of the two default user groups **Administrators** and **Default User Group**.
- New users are automatically added to the Default User Group. You can move them to a different group afterwards.

To create user groups:

- Log in to eSignatures.
- Click the settings icon the top toolbar and click **User management**.
- Click the **User groups** tab and then click **Create new user group**.



- Once the user group has been created, click **Edit** next to it to configure its permissions.



- Enable the permissions of your choice, and then click **Save**.

For detailed information on how to configure User Groups, see the corresponding section in the **User Documentation**.

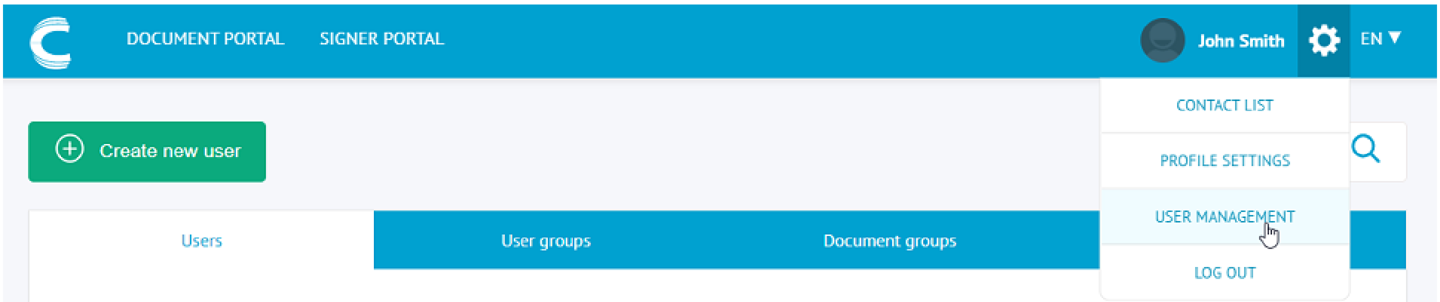
Click **Next** to go to the next step.

2.2 Create users and add them to a user group

Now you've created the necessary user groups, you can create users and add them to the right group.

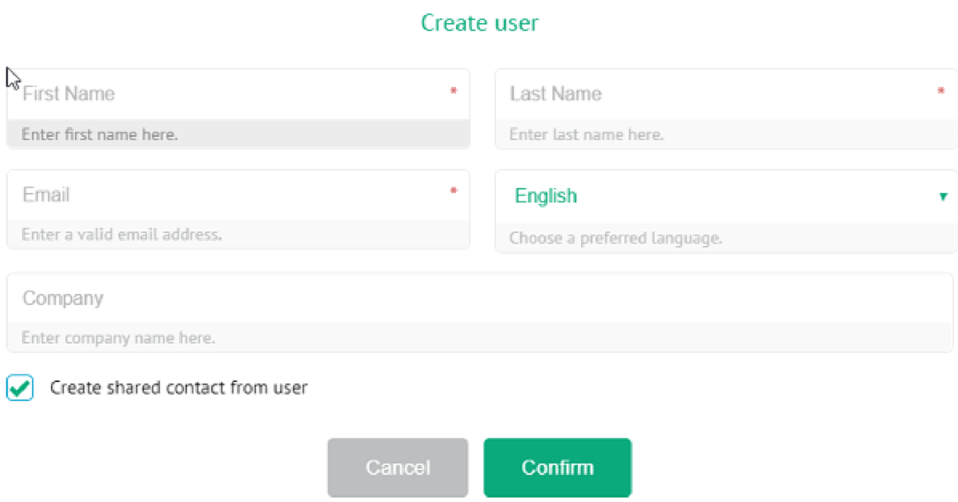
To create users:

- Log in to eSignatures.
- Click the settings icon the top toolbar and click **User management**.
- Click **Create new user**.



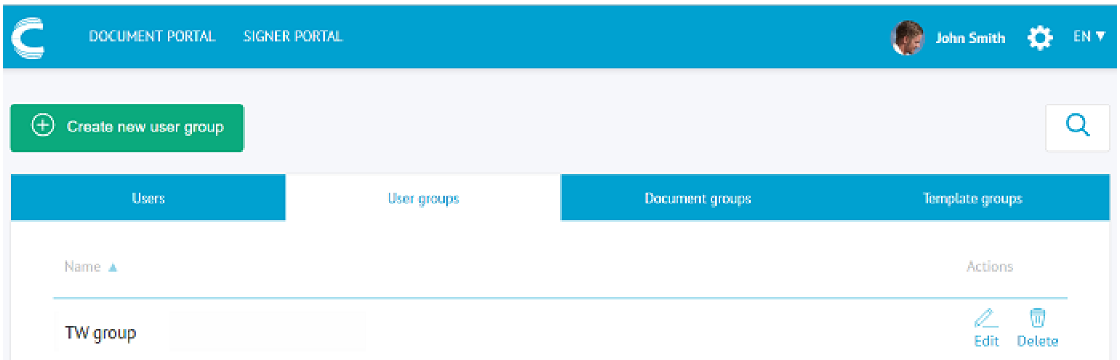
- Enter the required info and click **Confirm**.
    - The first and last name are used as salutation in the email notifications.
    - The email address is the address to which email notifications will be sent inviting the contact to take action.
    - The preferred language is the language in which the contact will receive notifications.

  Tip: you can also create a *shared contact* based on the user you're creating. This way, all users of your eSignatures platform will be able to send documents to this contact and they won't need to create the contact manually.

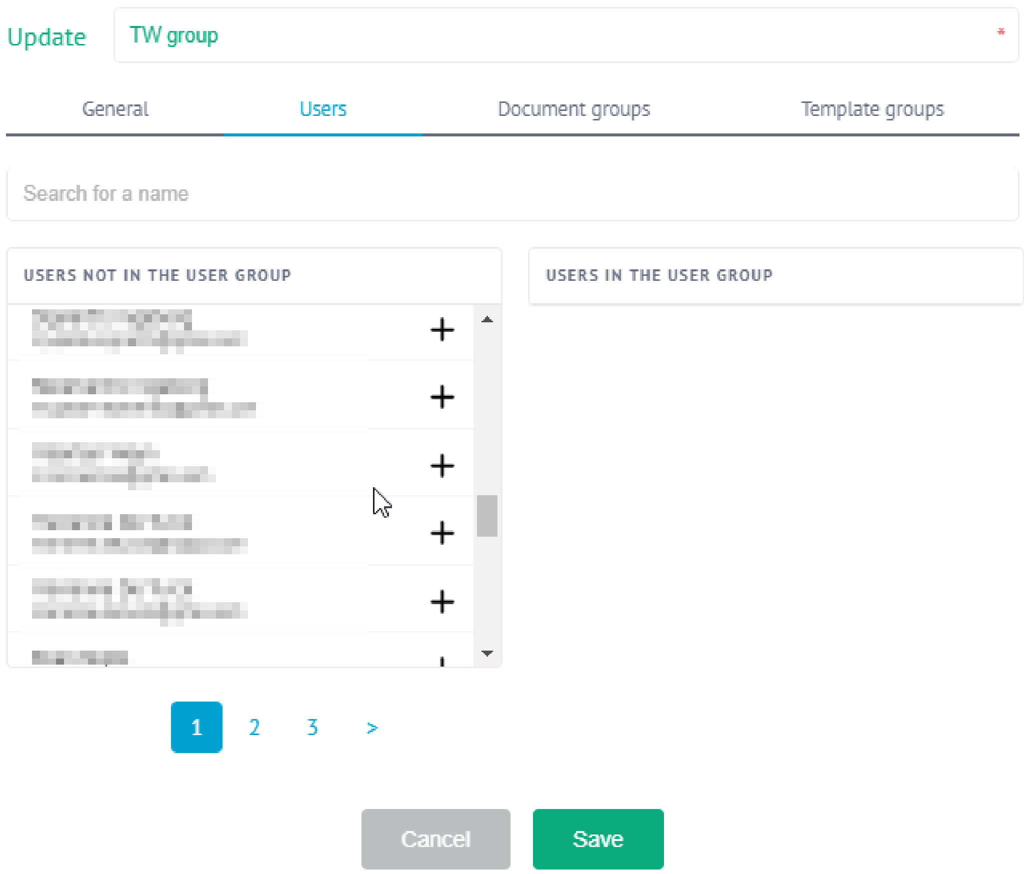


To add users to a user group:

- In the **User Management** section, click the **User groups** tab.



- Click **Edit** next to the user group to which you want to add the user.
- Click the **Users** tab and click the plus sign next to the user you want to add.
- The changes are auto-saved.



For more information on creating users, see the corresponding section in the **User Documentation**.

Click **Next** to go to the next step.

2.3 Create documents groups

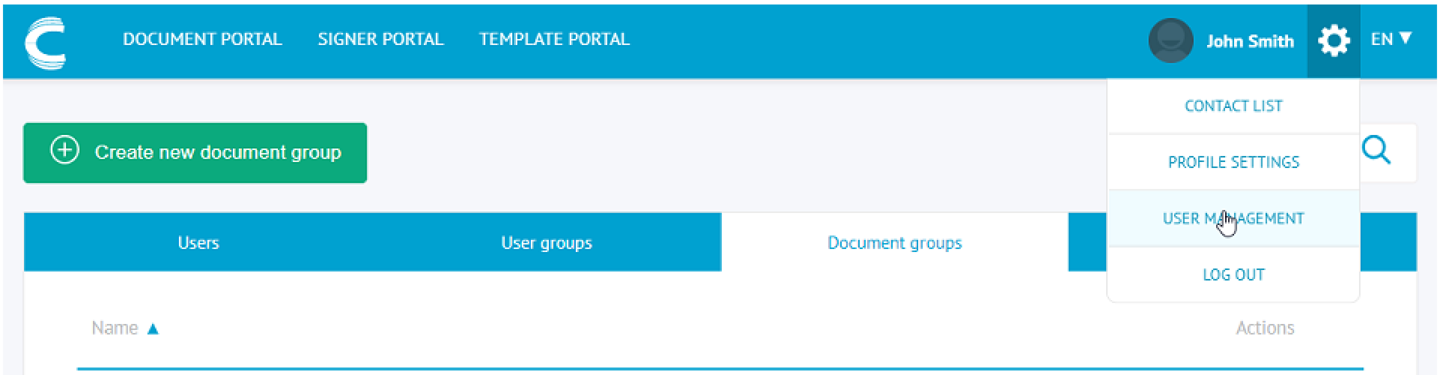
In a default configuration all documents a user uploads are sent to their personal **My Documents** folder. This folder is private and can only be accessed by the user in question.

Important: Never rename or delete the My Documents group! Doing so could lead to serious environment issues.

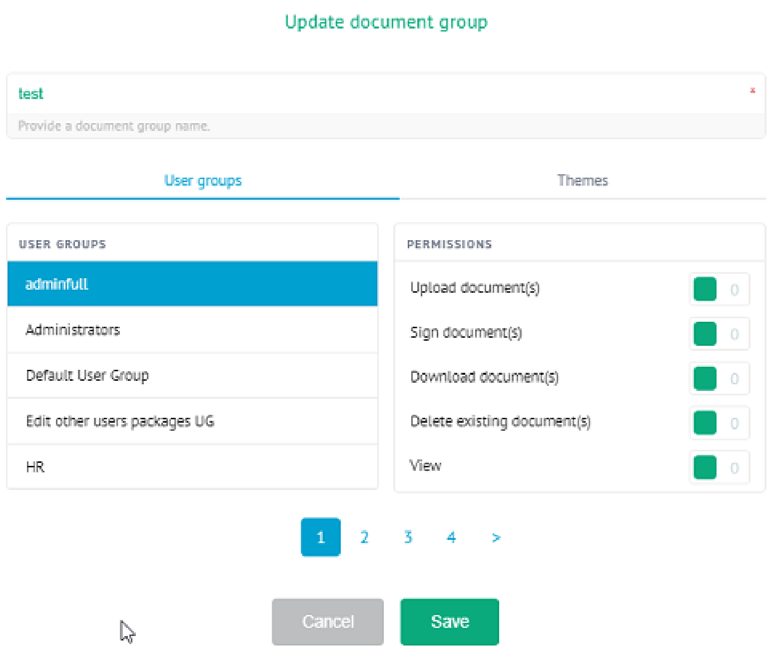
If you want users to be able to collaborate on one another's documents, you can create new document groups and determine which user groups should have access to them. You can even apply custom themes to a document group. This way, all documents uploaded to a specific document group can have the same customized look.

To create document groups:

- Log in to eSignatures.
- Click the settings icon on the top toolbar and click **User management**.
- Click the **Document groups** tab and then click **Create new document group**.



- Once the document group has been created, click **Edit** next to it to configure it.
- The available user groups are listed on the left-hand side.
- Determine for each group which permissions it should have on the document group.

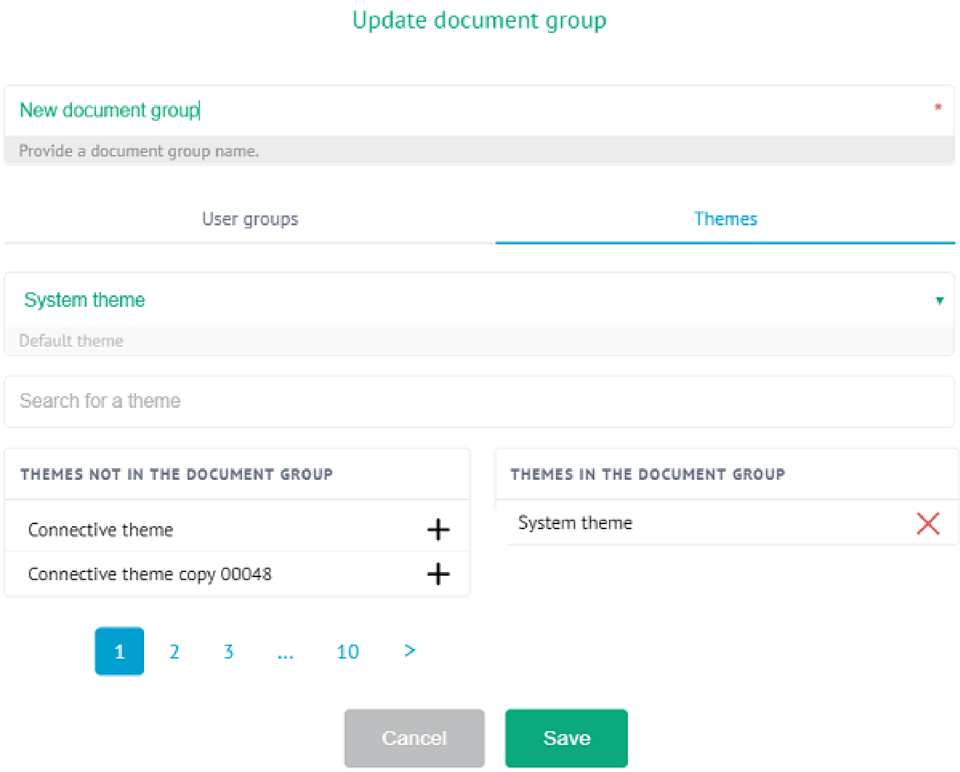


For detailed information on how to configure document groups, see the corresponding section in the **User Documentation**.

To apply a theme to a document group

- Log in to eSignatures.
- Click the settings icon on the top toolbar and click **User management**.

- Click the **Document groups** tab and then click **Edit** next to the document group you want to edit.
- Click the **Themes** tab.
- Click the plus sign next to the themes in the left-hand column to add them to the document group.
- Then click the **Default theme** list to select the default theme of the document group.



Click **Next** to go to the next step.

---

3. Create your contacts

Now that you've created users, you can start creating *contacts* to whom they can send documents for signing.

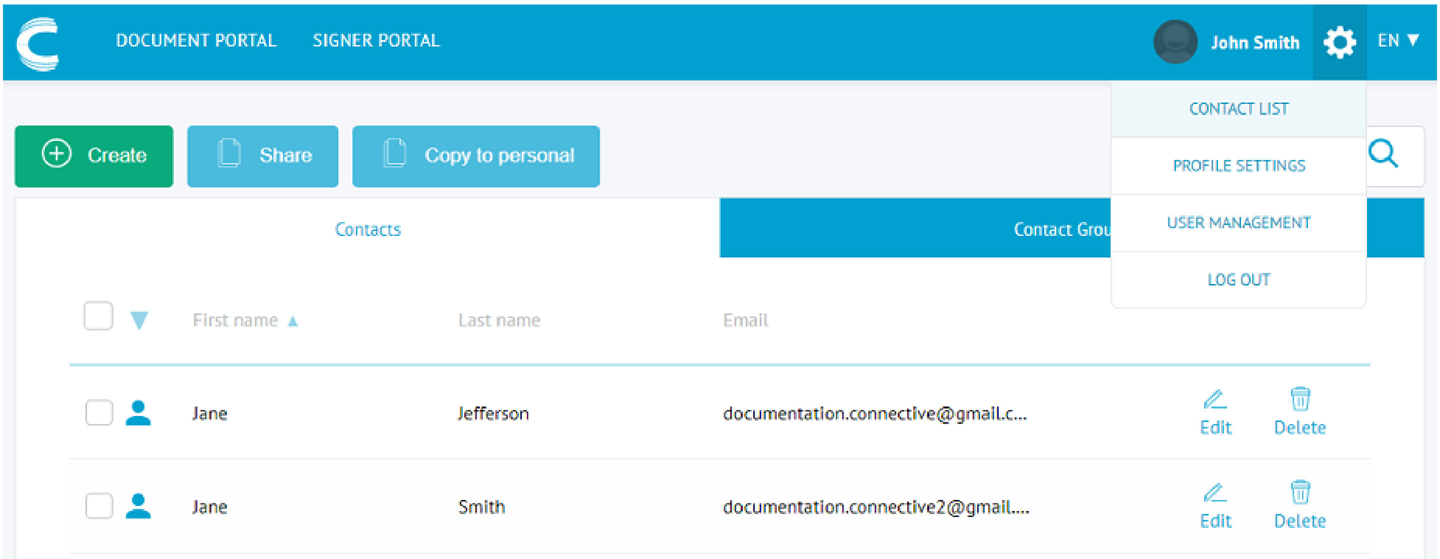
Note the difference between the two: *users* have access the eSignatures platform, while *contacts* receive documents for signing.

Tips:

- Contacts can be added to *contact groups*. This way, every member of the contact group can sign a document on behalf of the entire group.
- Contacts and contact groups can be shared amongst all users. This way, it's no longer necessary to create a contact list for every user individually.

To start creating contacts:

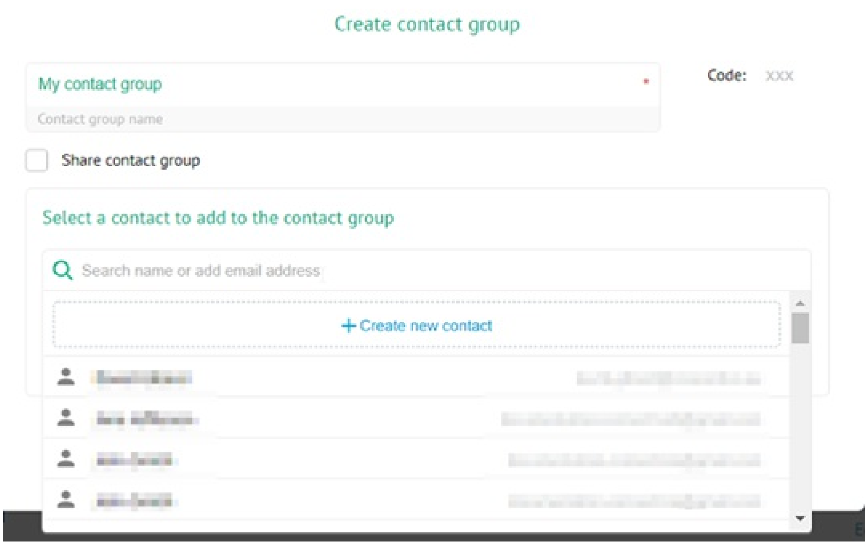
- Log in to eSignatures.
- Click the settings icon in the main toolbar, and click **Contact List**.



- Click **Create** to create a new contact.

To start creating contact groups:

- Log in to eSignatures.
- Click the settings icon in the main toolbar, and click **Contact List**.
- Click the **Contact Groups** tab, and click **Create** to create a new group.
- Enter a group name and select the contacts you want to add.



For detailed info on how to create, manage and share contacts and contact groups, see the corresponding sections in the **User Documentation**.

Click **Next** to go to the next step.

---

4. Upload documents for signing

The environment is now all set to send documents for signing.

A full explanation on how you can upload a document to be signed can be found here.

When uploading, take into account

- Do I want to upload the document to my personal documents or do I use a document group so I can collaborate with my colleagues?
- Do I want to use a legal notice?
- Should someone approve the document before signing?
- Should someone that is not involved in the signing process receive the signed document?
- Which kind of digital signature do I want to use?

Not sure about any of the terms used in this Quick Start Guide? Make sure to check our Glossary

For any further questions, do not hesitate to reach out to service@connective.eu

eSignatures 6.x.x - Quick Start Guide

Welcome to the **eSignatures 6.x.x Quick Start Guide**!

The goal of this documentation is two-fold:

- Walk you through the different steps you should take as **admin** to set up your eSignatures platform correctly.
- Explain first-time use.

Once you've received your activation mail, please go through the steps as listed below:

Configure your environment

1. Configure your SMTP server
2. Customize your notifications
3. Rebrand your platform
4. Configure Silverfin connector (Optional)
5. Configure Salesforce connector (Optional)

First-time use

1. Check your profile data
2. Manage user access
3. Create your contacts
4. Upload your first documents

Configure the environment

The next chapters detail the technical configuration of the eSignatures platform.

Note that it is not mandatory to perform these steps, but it will allow you to personalize the platform further.

Click **here** to start.

---

1. Configure your SMTP server

eSignatures sends notifications to users each time they need to take action or when their document status changes.

By default, we use the mailbox no-reply@connective.eu, but we could make use of the mail server of your company. For eSignatures to be able to send those notifications through your mail sever, make sure your SMTP server is configured correctly.

If you're a hosted customer, we configure the SMTP server for you. Please send the following information to service@connective.eu:

- From address
- Hostname
- Port (default 587 or 25)
- Whether TLS is required (recommended)
- Credentials to access the SMTP (if required) Note: please disable the option "Reset password at first login"

Example data for Office365:

DATA	EXAMPLE VALUES
From address	esignatures@yourdomain.be
Username	esignatures@yourdomain.be
Password	YourPassword
Hostname	smtp.office365.com
Port	587, TLS required

Click **Next** to go to the next step.

---

2. Customize your notifications

eSignatures sends notifications to users each time they need to take action or when their document status changes.

Each type of notification has default content but can be customized for your organization.

If you’re a hosted customer, contact service@connective.eu so we can guide you through the process.

If you're an on-premise customer, see **Connective - eSignatures 6.x - Configuration Documentation - Limited Public - OP** for more info on how to customize your notifications.

Click **Next** to go to the next step.

---

3. Rebrand your platform

The entire look and feel of your eSignatures platform can be rebranded and customized to suit your corporate identity.

Rebranding the platform is done in the **Theme** section of the Configuration Index. There, you can create new themes which can be applied on a general level to the entire platform, but also to specific document groups or even specific packages.

When setting up your eSignatures platform, Connective created an **admin user profile** for you. The credentials you've received for this profile allow you to access **Theme** section.

For detailed information on how to create and apply themes, see the latest **Branding Documentation**.

Note: Should you not be able to access the Configuration Index, contact service@connective.eu.

Click **Next** to go to the next step.

---

4. API integration

It is possible to use the eSignatures REST API to integrate eSignatures to a driving application

Detailed information can be found here: API Documentation

Contact service@connective.eu to receive the API endpoint and credentials.

Click **Next** to go to the next step.

---

5. Configure Silverfin connector

eSignatures allows for an integration towards Silverfin.

Detailed information can be found here: Silverfin

To activate the Silverfin connection, contact service@connective.eu.

Click **Next** to go to the next step.

---

6. Configure Salesforce connector

eSignatures allows for an integration towards Salesforce.

Detailed information can be found here: Salesforce

To activate the Salesforce connection, contact service@connective.eu.

You can now start with the First Time Use.

First Time Use

Now that the environment has been configured, we will walk you through the different steps before you can send your first document for signing.

Click **here** to start.

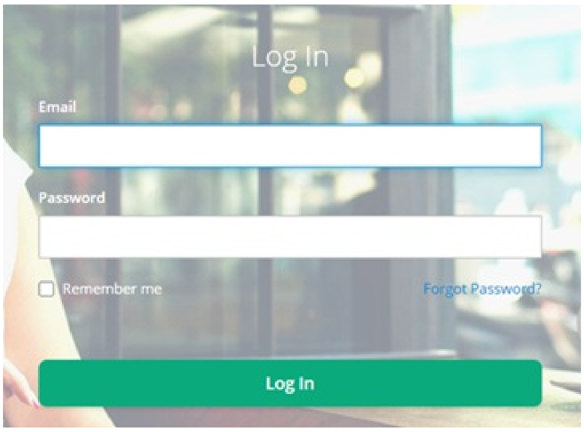
---

1. Check your profile data

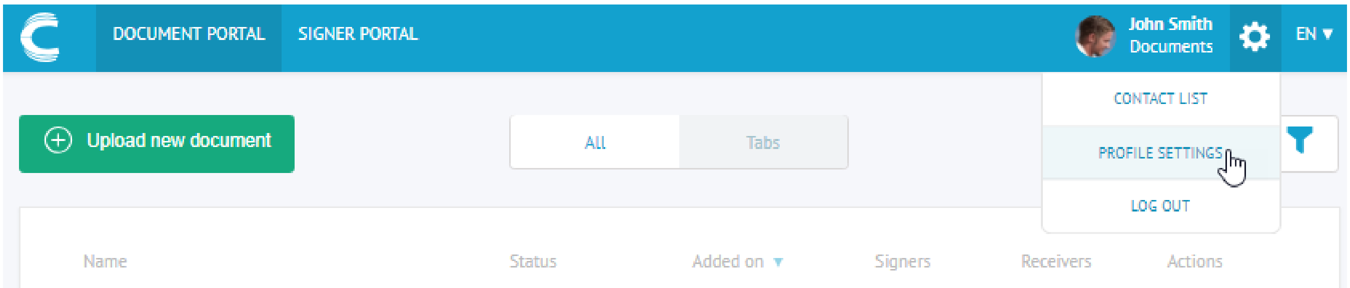
When creating your eSignatures account, an **admin user profile** was created. The data in your admin user profile affects users' eSignatures experience, so please make sure the data is correct.

To check your profile data:

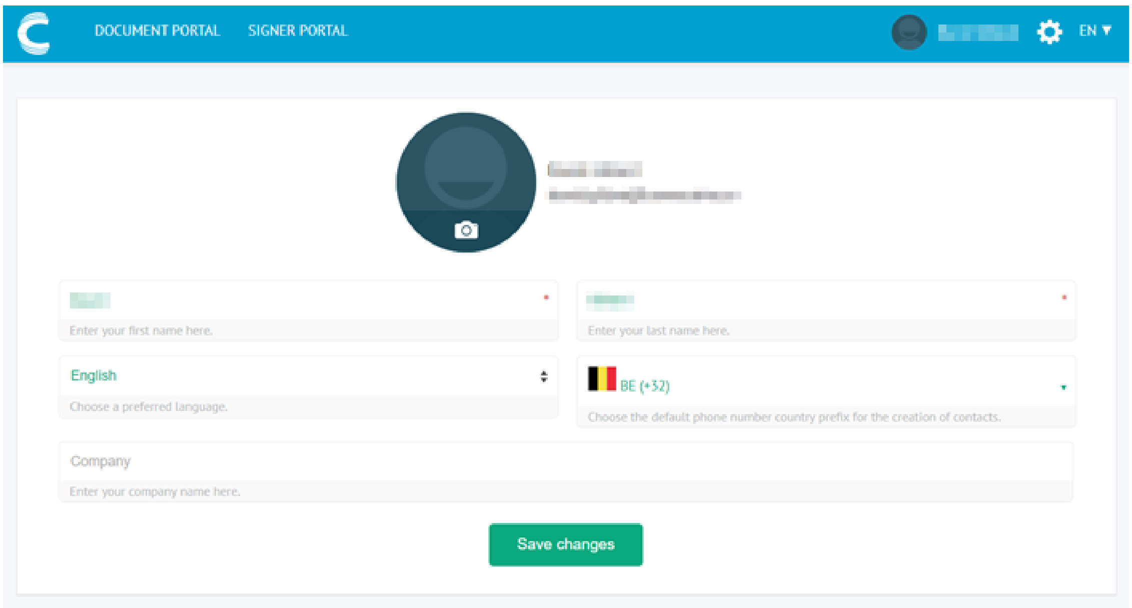
- Log in to eSignatures using the credentials you've obtained from Connective.



- Click the settings icon in the top toolbar and click **Profile Settings**.



- Check if the data is correct.
  - Your first name and last name are mentioned in the notifications sent to users. This only applies to packages sent from your account of course.
  - The preferred language will be the default language of every new contact you create, and of each package you upload.
  - The phone number country prefix will be the default prefix for every new contact you create.



Click **Next** to go to the next step.

2. Manage user access

You can now start creating users and manage their permissions.

2.1 Create users

2.2 Create user groups

2.3 Define user group permissions

2.4 Assign users to user groups

2.5 Create document groups

Note that eSignatures 6.0.x supports SSO. If you want to link your own Identity Provider to eSignatures, contact service@connective.eu.

Click **Next** to go to the next step.

2.1 Create users

As of eSignatures 6.0, users are created in a new tool: the Service Configuration Tool (SCT).

To create users in the SCT:

- Go to the **Access Management** section in eSignatures. To do so, click the settings icon in the main toolbar, and click **Access Management**.
- Click the **Manage users** button. You are now redirected to the SCT.
- In the SCT, click the **Users** tab and click **Create**.
- Fill in all required fields and click **Create**.
- Click **Save**.

Important: Make sure to use a strong enough password:

- At least 8 characters long.
- Not equal to the user's username.
- The last three passwords you've used for this user, cannot be reused as new password.
- A randomness check will be done on the password. If the password is not random enough an error message will be displayed.

Click **Next** to go to the next step.

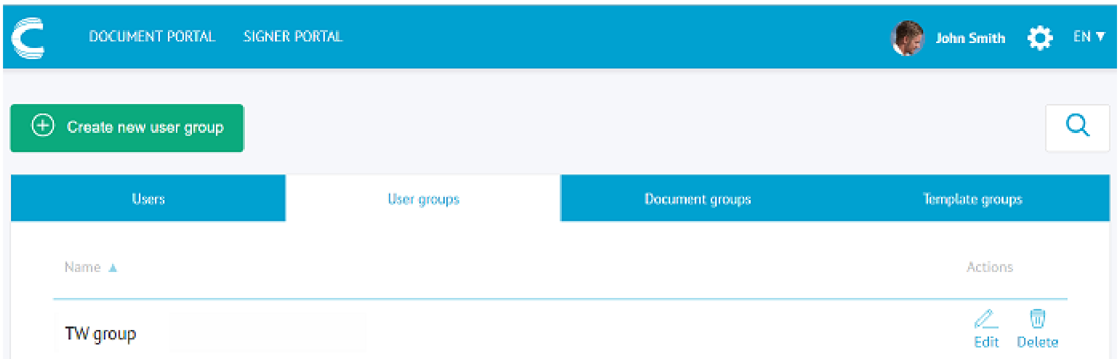
2.2 Create user groups in eSignatures

The next step to take, when all required users have been created in the SCT, is create user groups in eSignatures.

Each eSignatures user must be part of a user group, since user permissions are defined on user group level. This way, you don't need to determine the permissions for each user individually, but only on group level, which saves a lot of time.

To create user groups in eSignatures:

- Log in to eSignatures.
- Click the settings icon the top toolbar and click **Access management**.
- Click the **User groups** tab and then click **Create new user group**.



- Enter a name for the user group.
- Now you can edit the group's permissions.

Click **Next** to go to the next step.

2.3 Define user group permissions

Once a user group has been created in eSignatures, its permissions can be configured.

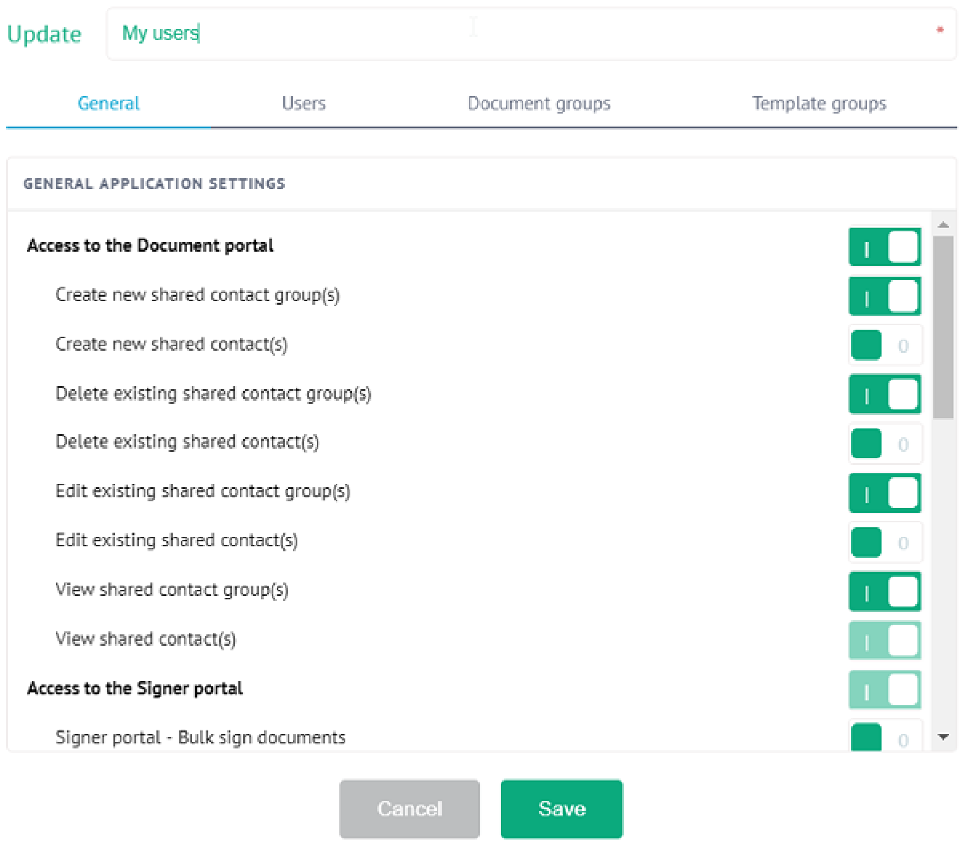
Permissions are managed on *group* level and not on user level. This way, you don't have to configure permissions for each user individually, which would be very time-consuming and impractical. So, think carefully about which types of permission sets you will require and make sure the correct users have been assigned to the right group. For instance, some users might only need to sign documents and therefore only need access to the Signer Portal. Others will only send documents and only need access to the Document Portal. Still others will need access to both.

Important:

- Never rename or modify the permissions of the default user groups **Administrators**, **Tenant Administrators** and **Default User Group**.
- New users that are created in the SCT are automatically added to the Default User Group.

To edit a user group's permissions:

- Click the **Edit** button next to the user group.
- Enable the permissions of your choice, and then click **Save**.



For detailed information on how to configure User Groups, see the corresponding section in the **User Documentation**.

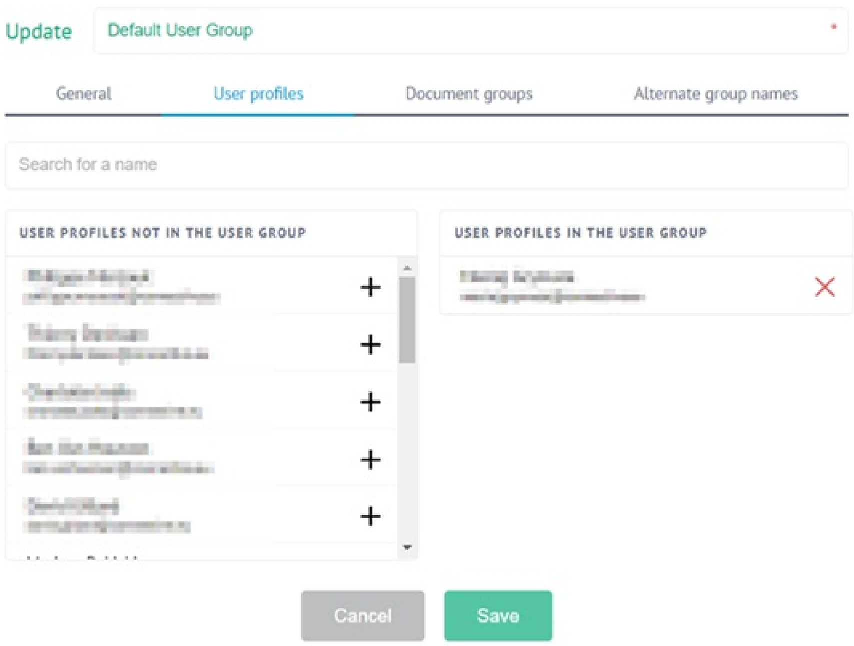
Click **Next** to go to the next step.

2.4 Assign users to user groups

Once you've defined the permissions of each user group you can assign users to them.

To assign users to a user group:

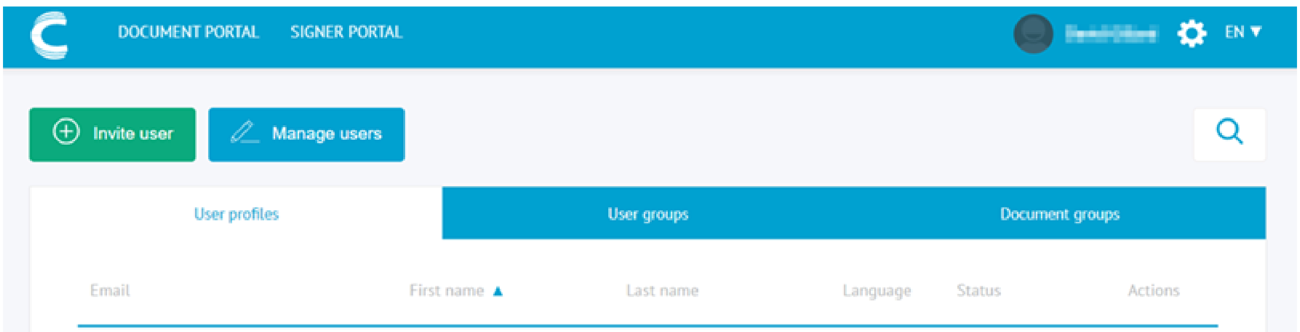
- Log in to eSignatures.
- Click the settings icon in the top toolbar and click **Access management**.
- Click **Edit** next to the user group to which you want to assign users.
- Click the **User profiles** tab.
- Click the plus sign next to the users you want to add to the user group.
- Changes are saved automatically.



Tip: if any users you've created in the SCT do not appear in the list of user to add, it means those users haven't logged in to their eSignatures account yet.

To solve this:

- Exit the current screen, and click the **User profiles** tab.
- Click the **Invite user** button.
- Enter the email address of the user you've created in the SCT and click **Confirm**.
- The user should now appear in the **User profiles** list.



Note: When a user receives invitation mail to access their environment, they first need to click the **Reset password** button to choose a new password to access their account.

Click **Next** to go to the next step.

2.5 Create documents groups

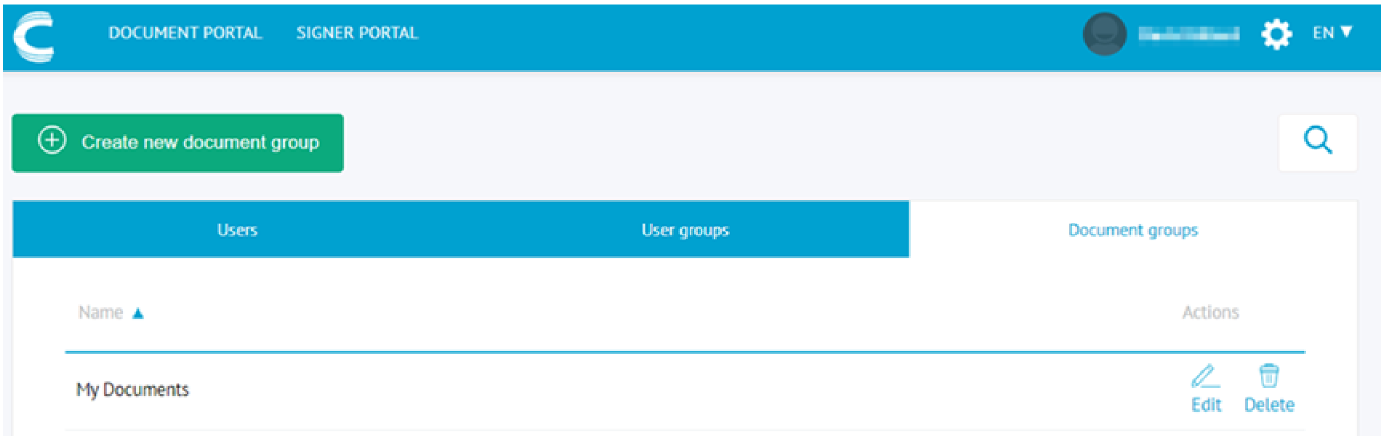
In a default configuration all documents a user uploads are sent to their personal **My Documents** folder. This folder is private and can only be accessed by the user in question.

Important: Never rename or delete the **My Documents** group! Doing so could lead to serious environment issues.

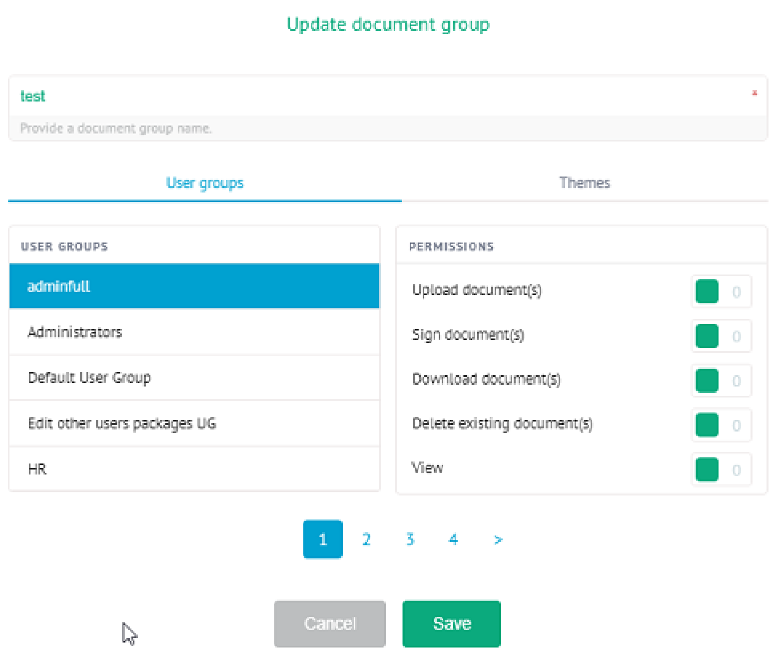
If you want users to be able to collaborate on one another's documents, you can create new document groups and determine which user groups should have access to them. You can even apply custom themes to a document group. This way, all documents uploaded to a specific document group can have the same customized look.

To create document groups:

- Log in to eSignatures.
- Click the settings icon on the top toolbar and click **Access management**.
- Click the **Document groups** tab and then click **Create new document group**.



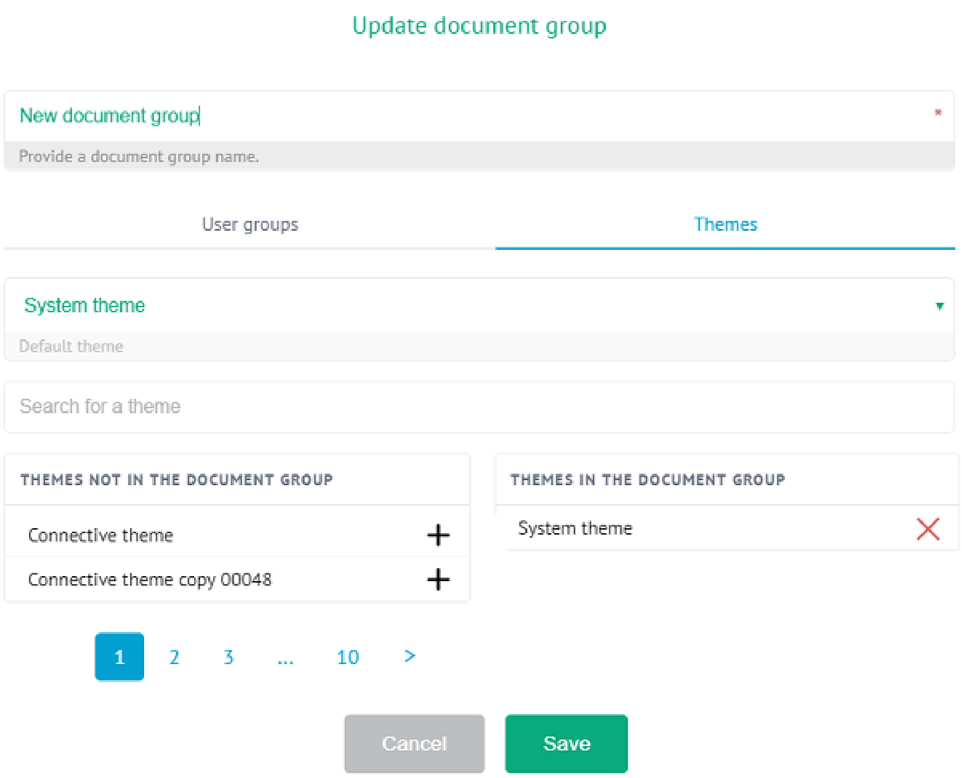
- Once the document group has been created, click **Edit** next to it to configure it.
- The available user groups are listed on the left-hand side.
- Determine for each group which permissions it should have on the document group.



For detailed information on how to configure document groups, see the corresponding section in the **User Documentation**.

To apply a theme to a document group

- Log in to eSignatures.
- Click the settings icon on the top toolbar and click **Access management**.
- Click the **Document groups** tab and then click **Edit** next to the document group you want to edit.
- Click the **Themes** tab.
- Click the plus sign next to the themes in the left-hand column to add them to the document group.
- Then click the **Default theme** list to select the default theme of the document group.



Click **Next** to go to the next step.

---

3. Create your contacts

Before you can send documents for signing, you first need to create the necessary *contacts* to which the documents must be sent.

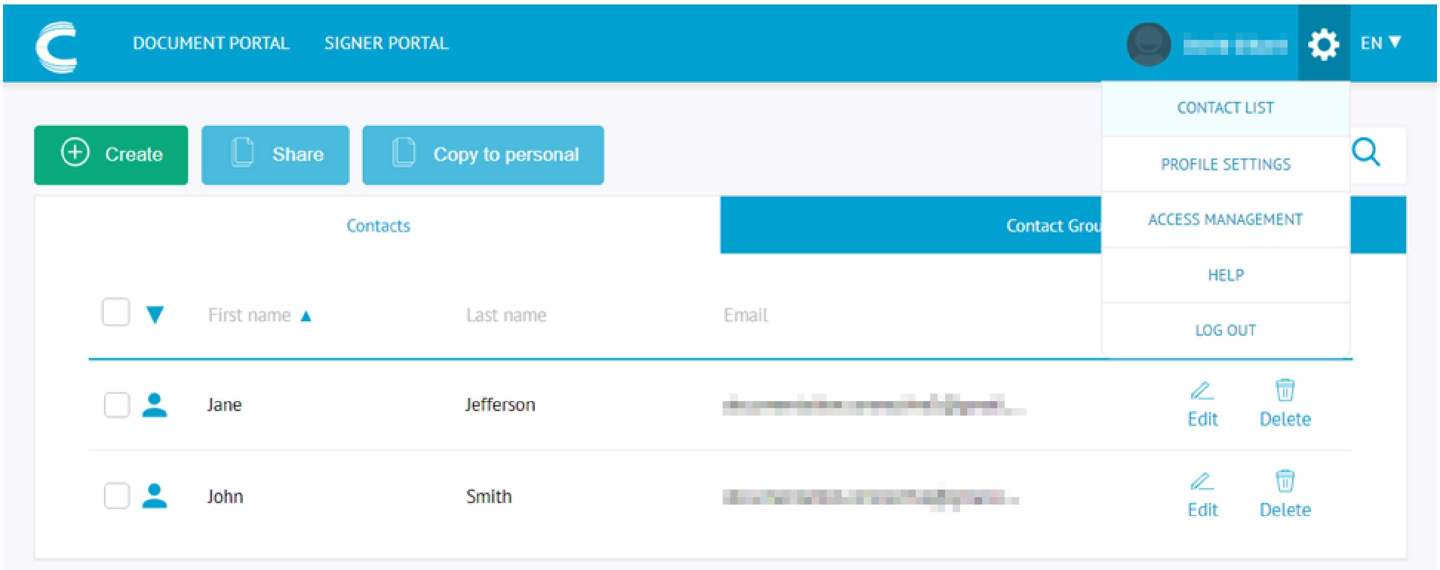
Don't confuse contacts with users: *users* have access the eSignatures platform, while *contacts* receive documents for signing.

Tips:

- Contacts can be added to *contact groups*. This way, every member of the contact group can sign a document on behalf of the entire group.
- Contacts and contact groups can be shared amongst all users. This way, it's no longer necessary to create a contact list for every user individually.

To start creating contacts:

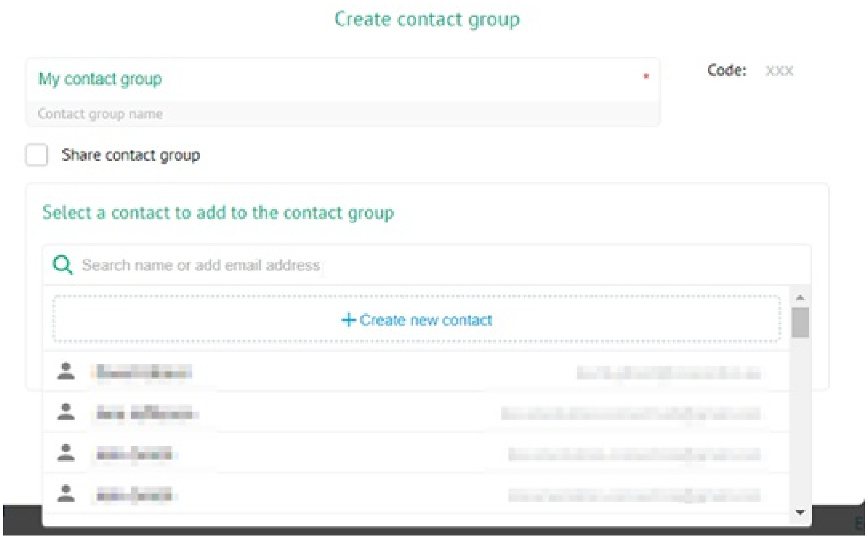
- Log in to eSignatures.
- Click the settings icon in the main toolbar, and click **Contact List**.



- Click **Create** to create a new contact.

To start creating contact groups:

- Log in to eSignatures.
- Click the settings icon in the main toolbar, and click **Contact List**.
- Click the **Contact Groups** tab, and click **Create** to create a new group.
- Enter a group name and select the contacts you want to add.



For detailed info on how to create, manage and share contacts and contact groups, see the corresponding sections in the **User Documentation**.

Click **Next** to go to the next step.

---

4. Upload documents for signing

The environment is now all set to send documents for signing.

A full explanation on how you can upload a document to be signed can be found here.

When uploading, take into account the following points:

- Do I want to upload the document to my personal documents or do I use a document group so I can collaborate with my colleagues?
- Do I want to use a legal notice?
- Should someone approve the document before signing?
- Should someone that is not involved in the signing process receive the signed document?
- Which kind of digital signature do I want to use?

Not sure about any of the terms used in this Quick Start Guide? Make sure to check our Glossary.

For any further questions, do not hesitate to reach out to service@connective.eu