Video Tutorials List

Last updated August 06, 2024

1. Account Creation & Sign-in

How to create an account and sign in using a temporary password. Also shows sign in options: Microsoft, LinkedIn, and Google accounts. (Video link - 00:55 min)

➢ *Details*

To get started with your account, you can go to www.doconchain.com where you can see two buttons for login and try for free. Or you can go to app.doconchain.com.

If you are new to this platform, you can click [**Try for Free**] to go to our sign-up modal where you can inform your information and a password to create an account.

You can also use your Google, LinkedIn account, or Microsoft account to sign up on DOCONCHAIN. If you were given an account with a temporary password, you may proceed to the [**Log In**] button to log in with your account.

Once logged in, you will be prompted to this modal to update your password. Once done, you can click [**Update**] and proceed with using your DOCONCHAIN account.

2. Homepage

Side panel, Chat box, Quick product access (drag and drop), organization invitations, notifications, and Account Settings. (Video link - 2:03 min)

➢ *Details*

Now that you have logged into your DOCONCHAIN account, it's time to get to know more about the platform, starting off with the **Homepage**.

On the left panel, you will see our DOC Solutions – starting off with the DOC Sign, which allows you to create, sign, and send out your documents. Templates allow you to upload and save preset forms for future use.

DOC Verify instantly authenticates your documents to know whether they were tampered with or altered outside our platform. DOC Vault lets you store and organize your completed and signed documents.

And Contacts allows you to save frequent signers and important contacts. Below you can see the chat box, which lets you reach out to us if you have any questions regarding our platform.

You may also collapse this panel for better use of the space. In the center portion, you will see the DOC Sign dashboard, which contains numbers that represent your active documents. These are the documents that are waiting for you to sign, waiting for others, for your validation, and your drafts.

You may also see the DOC Verify shortcut, where you can start uploading and instantly checking the authenticity of your documents. Lastly, you see three icons on the upper right which represent different functionalities.

The first one is for all your organization invites; The second one is for all your notifications on the actions taken inside your DOCONCHAIN account; And the third one contains your account information on DOCONCHAIN.

This is also where you can access your billing, account settings, organization settings, and your log out button.

3. Account Settings

Account profile information and signature configurations. (Video link - 1:10 min)

- *Details*

Before starting to work on your projects, you need to first configure your account. To do that, you need to go to your account settings, which you may find upon clicking your profile picture thumbnail.

Account settings let you edit your profile information such as your name, as well as your company name, industry, your job title, and your country.

You may also view and update your login information here. And of course, you may update and save your signature profile. To save your signature, you have three options.

You can either draw, upload a photo of your signature, or type in your signature and select from the preset fonts. You can also save multiple signatures.

4. DOC Sign

1) Dashboard

List of active documents, sorting tabs, status, action buttons and document uploading. (Video link - 1:50 min)

- *Details*

On the DOC Sign dashboard, you can see your active documents. To go here, you can click on Sign from the solutions panel.

The DOC Sign dashboard allows you to monitor your active documents using the status, filter them using the tabs above, for those waiting for you, waiting for others, scheduled and drafts.

You may also restore or permanently delete your files in the trash folder. You also have action buttons for your documents on the dashboard.

These are used to either reschedule, edit, view, resend, or delete your documents. You can also start uploading your documents by clicking the [Upload] button, or by simply dragging and dropping your files on the dashboard.

2) Creating a Project

i. Step 1: Uploading a document

Different options to upload a document – featuring local files, cloud storage integration, selecting from templates and drag and drop options. (Video link - 1:07 min)

➢ *Details*

There are different ways to upload your document. First is by simply dragging and dropping your document on the DOC Sign dashboard found on the homepage. You may also do this on the DOC Sign page.

The 2nd method is by using the [**Upload**] button, which can also be found on the DOC Sign page.

You can also upload either from your Local Files or connect directly to your cloud storage such as Google Drive, OneDrive or Dropbox.

Additionally, you can select from your templates folder. Once done, you can now start working.

ii. Step 2: Document Settings 1

Change the file name, navigate, zoom, fit to height, fit to width, thumbnails. (Video link - 1:01 min)

➢ *Details*

Now that you have uploaded your file, it's time to learn about the document settings. For the first part, we have the file name customization where you can change and rename your document.

You can also click on the thumbnail to view all the pages or select a specific page to view. The [Gear] icon lets you change the page transition, or page rotation.

You can also drag and move your document using the hand icon. For a better view of your document, you can either zoom in, zoom out, or change it to Fit Page or Fit Width.

iii. Step 3: Document Settings 2

Add pictures, stamps, notes and documents. Add, delete, rotate, move pages. (Video link - 1:14 min)

➢ *Details*

For the second half of the document settings, we have the basic editing tools. Starting off with the dropdown with a [picture] icon on the document viewer toolbar, where you can add images or a stamp, which you can select from our library or create on your own.

You may also add a note, which you can customize and place anywhere on the document. To delete, click on the note or image and the backspace button on your computer for confirmation.

We also have the editing tool [document with a pen icon] where you can add, delete, duplicate, rotate, or move or rearrange the pages. You may also see more options on the three dots in case you wanted to import documents, extract pages, or zoom in or out your document.

iv. Step 4: User Settings

- Managing recipients

  Search, add recipients from contact or manually, user roles, signing order, add recipients to contacts. (Video link - 1:59 min)

  ➢ *Details*

  After the document settings, let's now proceed with working on the project.

  Starting with the [**USERS**] Settings, you can select the signatory type if Only Me, Me and Others or Just Others. If you are going to sign with someone else, you may click Me and Others.

  To add a recipient, click on the [**Manage Recipients**] button. Once clicked, a modal will appear showing the contacts that you previously saved on our platform. You can either scroll down or search for the name/email using the search field.

  Once found you can click on the ["**person with a plus**"] button to add them to your document.

Once added, you may select from the dropdown the appropriate User role, there are four user roles:

- **Signer:** who will sign the document.
- **Viewer:** who will receive a copy of the document but not asked to sign.
- **Approver:** who will have the option to approve/decline the document.
- **Issuee:** who will receive the document once it is completed.

You may also add contacts manually by putting their name, email address and access role.

On the left side of the name, you will see a dropdown for the signature order. This lets you organize who will receive and sign the document first. The succeeding recipients will only receive the request to sign/view once the prior ones have already signed.

- Adding Marks

  Current page, All pages, Specific pages, Select user, Signature, Initials, Text Box, Date. (Video link - 1:47 min)

  ➢ *Details*

  After successfully adding recipients, marks can be added. To select a page where you want to work on, you can click on the thumbnail or scroll down on your document.

  To add a mark, you must first click and highlight the name of the recipient or the signer. You may also select the page settings if you want the mark on all pages, on the current page, or on a specific page number.

  Here we have four different marks which can be assigned to recipients:

  - **Signature:** which appears in the middle of the document but can be repositioned and resized.
  - **Initials:** which appear at the lower left part of the document, which can also be repositioned or resized,
  - **Date.**
  - **Text:** add any additional information that is required.

  To edit the marks, you may click on the [edit] button. Once done with editing, you may click on the [check] button. You may also do the same with all the recipients that you have on your document.

v. Step 5: Project Settings

- Document Security and Privacy settings

Manage how the document will be secured and completed (Video link - 2:28 min)

➢ *Details*

After navigating the [**USERS**] tab, we can now proceed to the [**SETTINGS**] tab. Here are the different options to ensure your document security and privacy.

- **Make my Organization the Issuer**. This allows you to send a document using your organization or your company name instead of the account holder's name. It is also part of our branding feature, which allows you to to promote your brand with each document you send.
- **Allow Signers to Resize and Reposition Their Marks.**
- **Signature timestamp labels.** This provides additional information on the document: the name, email, date and time when the document has been signed.
- **Manual document validation** allows the creator to recheck the document prior to ensuring that all marks are properly aligned and placed on the document once signed by all the recipients. The document will return to the creator's DOC Sign page for their validation.
- **Add document QR code.** The QR code is used for instant verification of your document. You can also select the page placement whether it be on the last page, current page, or a specific page number. The QR code is also resizable and can be moved anywhere on the page. Another unique feature is that this QR code is clickable, which provides easier access to the document.
- **Add authentication keys on pages.** A unique document identifier for additional security.
- **Send by email the Certificate of Completion.** For better document tracking and authentication, this certificate includes all the information on the parties involved. Including the name, email address, and the device that they used to sign the document.

- Active Document Access

Manage how the document can be accessed. (Video link - 1:39 min)

➢ *Details*

These are the settings that you can set prior to the signing process:

- **Account Restriction:** allow signers to view or sign your document as guests (no account required) or require them to create an account first with DOCONCHAIN.

- **Signature Type:** restrict which signature type will be allowed to be used by signers.
- **Signature Reminders:** emails sent automatically to help save time and effort, instead of manually resending the document reminders. The day on the first reminder will be counted after the document was sent out, and the following reminders will be counted after the first. The signature reminders will stop once the document has been signed by all recipients.

- Completed Document Access & Document Description

  Manage how the document is accessed and described (Video link - 1:04 min)

  ➢ *Details*

  The **Completed Document Access** includes settings you may set for once the document is completed:

  - **Viewer Access:** the completed file access can either be public (anyone with the link) or private (only the people who have an account, are logged-in and part of the recipients). A document can be publicly accessible and require an account, so that they can be tracked if they view the document.
  - **Document Description:** add any information to better describe the document in the email.

vi. Step 6: Message Settings

Custom subject line and message. (Video link - 1:22 min)

➢ *Details*

The **Message Tab** allows to customize the email that will be received by your recipients.

- **Subject line:** default configuration will be "Signature Request via {company name} | {document name}". You can also customize this for better recognition of your email request.
- **Message:** you create a personalized message to your email request. This is useful especially if you have further instructions or reminders for your recipients.

vii. Step 7: Sending a document

Send now, send later, and options to check before sending a document. (Video link - 1:59 min)

➢ *Details*

Once done with all the settings, we can now proceed to send out the document. Here are the other options you may see and use for your document:

- **Delete**: delete the document and go back to the DOC Sign page.
- **Save:** save the current progress made and stay on the document.
- **Save and Exit:** save the current progress made and go back to the DOC Sign page.
- **Send Now:** send your document now.
- **Send Later:** Schedule a specific date and time for the document to be sent automatically. You may click here [calendar icon] to select your preferred schedule.

Once the document is approved for sending, you can choose different email options:

- **Receive an email notification during the document updates:** be notified or not via email when the document has some updates (signed, approved).
- **Receive an email notification when the document is completed.**
- **Attach completed document (PDF):** receive the document by email once it is completed.
- **Attach certificate of completion (PDF):** receive the certificate of completion by email once the document is completed.

If the PDF attachment exceeds 5 MB, you will receive an email link to your signed document. These PDF documents, however, will be received automatically by those who do not have an account with DOCONCHAIN and sign as guests. This is for them to have a copy of the document after the signing process.

Once done with these options, you can click [**YES**] to proceed. After which you will be redirected to the DOC Sign page, and you will see the document status as waiting for others.

3) Quick Sign

How to sign without a DOCONCHAIN account. (Video link - 3:17 min)

➢ *Details*

If Make My Organization as the Issuer has been selected, the sender email will be the company or the organization name via DOCONCHAIN.

The subject line is also by default but can also be customized for better recognition. The logo of the organization is inserted on the top of the email as part of the branding features. This logo is also clickable which leads to the website or the link that you put in the organization settings.

Information is displayed about the issuer, the creator, and the document which includes the document file name, document description, and the message which can all be customized in the **Project Settings.**

To sign a document, just simply click on the [**SIGN DOCUMENT**] button in the email, you will be redirected to the platform and access the document if **No Account Required** was selected by the creator, or if you are already logged-in. A sign-up modal will appear if **Account Creation Required** was selected. This means you need to log-in or create an account with DOCONCHAIN before being allowed to view and sign the document.

To edit your signature, you can click on the signature box and update your signature based on the given options.

Then you can click on the [**Sign**] button or **Click to Sign** in the document to attach your signature. You can also adjust the size and reposition your marks if the option is given.

To edit the text box, you can click on the [edit] icon and start editing. You can also edit the date using the dropdown to show the calendar.

Once done, you can click on the check mark to indicate that you are finished with the editing. Once all done, you can click the [**Finish]** button, and a confirmation modal will appear.

Before finalizing your signature, you will have the option to receive an email notification when the document is completed, which you can click or unclick based on your preference.

Once done, you can hit **Confirm** and the document will be done. You will then receive an email notification of the completed document once everyone has signed your document.

4) Manual Validation

How to validate a document before completion. (Video link - 00:53 min)

- *Details*

If the **Manual Validation** option is selected, the document will return to the creator's DOC Sign for their validation before it is completed. To start, you can click on the [**validate**] icon. Once opened, you can review the document to make sure that all the marks are aligned and in position. You can also resize and reposition the marks according to your preference. Once done, you can click on the [validate] icon to validate the document.

The document will then be on the processing status and once completed, it will automatically go to the Vault.

5. DOC Vault

1) General features

Sorting tabs, delete, view, print, download and move file to a folder, create folders and sub-folders. (Video link - 2:25 min)

➢ *Details*

DOC Vault serves as the storage of your DOCONCHAIN account. This means that all completed and signed documents are automatically saved here.

You can sort the items using the tabs above for **Folder and Files**, **Folders Only**, and **Files Only**. You can also restore or permanently delete your files in the **Trash Folder.**

You can also search for your documents using the **Search Tab**. You may also leave the document as it is or create folders and subfolders to better organize your files.

You can click the [**Add Folder**] button to create either a folder or a subfolder. To create a subfolder, you need to first select a main folder and choose a subfolder name.

Once finished, you can click [**Done**] to add your subfolder, which you can start moving your files to. To do that, you can click on this [move] icon and select the subfolder or the folder that you want to move your documents into.

There are also other **Action Buttons** that you may do on your documents in the DOC Vault. These include **Download, Print, View,** and **Delete.**

DOC Vault also lets you view your documents and review all the settings that you set during the document signing process.

In the document settings, you can also edit the **Completed Document Access** settings if you wish to put it on private or public access.

You also have the same icons such as the thumbnail, gear icon for the page mode, hand icon for moving your document, zoom in and out of your document.

You can also print or download your document in the document view modal.

2) Sharing document access

How to share access to your document. (Video link - 2:11 min)

➢ *Details*

To access the **DOC Passport**, you need to go back to the DOC Vault and open a document.

The **Passport** is used to review, track, and share your document.

You can **Send An Access Link To Your Document by** using the options under the **Users Tab** or under the **Passport Tab**.

To send an access link, you need the first name, last name, and email address of your recipient. You can also put a **Password** and **Include the Access Key in the Email** that will be sent.

You can also put **For Read** or **For Read and Download**. This allows you to restrict your document in case you don't want anyone to download it outside the platform.

Once done, you can hit [**Send**] and confirm with your account password.

The recipient will then receive a copy of your document through their email. To view the document, they just must click on the [View Document] button and enter the access code given on your request. Once opened, you will see some icons that you can use to navigate the document.

If the **For Read and Download** option is selected, the print and download icons will be seen and can be used.

If the **For Read** option is selected, the download and print icons are disabled. This is to prevent your recipient from downloading or printing your document.

3) Certificate of Completion

A summary of all important information about your document and recipients. (Video link - 2:03 min)

➢ *Details*

To find the **Certificate of Completion**, you need to go to the Vault and open a document. It can also be automatically received by email if the option was enabled. Once the document is opened, you can go to the **Passport Tab** to view the Certificate of Completion. It includes multiple information including the document file name, the number of pages, the issuer information as well as the creation and completion dates and times, and security keys. You may also see other details such as a signature order, number of signers, and other parties that are involved in the signing process. You can also see all the recipients' account information and their activities which include the **Sent, Viewed,** and **Signed** date and time, the **Signature Type,** and the **Device** used for the signature.

At the bottom of the certificate will be the **QR Code** that can be scanned by a phone to verify the authenticity of this document.

In the **Passport Tab**, you can **Send an Access Link to the Passport** and **Send an Access Link to the Certificate of Completion.** To send the access link, you need the first name, last name, and email address of the recipient. You can also protect it with a **Password** and **Include the Access Key in the Email** that you will be sending. You can also restrict it for **For read** only, or **For Read and Download**.

4) Document History, security keys and user data

Access the document audit trail, its security keys and user data (Video link - 1:16 min)

➢ *Details*

After the **Certificate of Completion,** the **DOC Passport** provides the additional information:

- **History:** an audit trail of all the document events with the user identities, dates and times when it was created, sent, viewed, signed, completed, printed, downloaded and even beyond the completion of your signing process.
- **Blockchain:** unique record of events when the document is signed and completed. These are called security keys or blockchain that are hack-proof and can be verified.
- **User Data:** information on the document creator and recipients.

6. DOC Verify

Instantly verify the authenticity of a document with Upload, Document code, QR code scan or click. (Video link - 2:38 min)

➢ *Details*

When a document is secured on DOCONCHAIN, its data and meta data are recorded on its hack-proof blockchain. When a document is verified, its information is compared with the blockchain records and can prove its authenticity, alteration or non-recognition.

On the DOC Verify dashboard, you can see all the documents that were verified on the platform.

Here are the different ways to verify a document:

- **Upload:** click on the [**Upload**] button to verify a document from local files or cloud storages. The document can also be dragged and dropped on the top banner. This is the most trusted method to verify a document.
- **QR code:** scan or click the QR code on your document if this option was made available by the creator.
- **Document code:** insert the code in the [**enter DOC code**] field. The document code can be found in the document's Passport tab.

The QR and document codes will redirect to a document link, this document may not be the same as the one on hand. It requires an additional and manual verification to prove the authenticity of the document.

7. Organization

1) Organization Settings

Configure name, logos, link, details of an organization. (Video link - 2:57 min)

➢ *Details*

The **Organization Settings** are accessible through the account information under the profile picture thumbnail on the upper right of the platform.

The DOCONCHAIN account can be personalized by showcasing your brand in the emails and during the signing process.

If you are under the Enterprise Plan, you will see tabs here for your **Organization, Manage Credits, Credits History,** and **Request more credits.**

You will also see all the credits left in your organizations. You can see the parent organization and a button to create a sub-organization.

Before creating a sub-organization, you need to configure first your parent organization. To do that, you can click on the [**gear**] icon next to the parent organization.

Once clicked, a modal will appear for your organization details. This is where you can update your **Organization logo** and your **Organization avatar**.

You can also edit here your **Organization Name, Logo Link**, which can be the link to your website or any page that you wanted to promote.

You can also put other **Details** like the address, phone number, or any significant information you want to share with your recipients.

Once done, you can click [**Save**] and your organization details will be updated. If **Make my Organization the Issuer** option is selected under the settings during the project creation process, the recipient will receive your document request from your DOC organization name via DOCONCHAIN.

On the signature request, they will also be able to see your logo, if they click on it, they will be redirected to your website or to any link that you put on your DOC organization.

They can also see the information about the issuer organization name and the creator as the account holder name.

2) Adding Members and Assigning Roles

Adding members to the organization with different roles – admin, member, owner. (Video link - 3:35 min)

➢ *Details*

DOC Organization also allows you to add **Users or Seats** inside your Organization and manage them. This helps you manage their payments for Business Plan seats and to add users, purchase and allocate document credits for the Enterprise plan.

There are **3 User Roles** in the DOC Organization:

- **Owner:** the user being billed for the Business plan seats and the one who is purchasing and allocating the Document credits for the enterprise plan. The owner can also add users and assign roles or remove them.
- **Admin:** can also add and remove members and manage the organization.
- **Member:** who can be a part of the organization but does not have any authority to add or remove other members.

To add a member, click on the [**Add Members**] button and put the person's name, last name and email address. You can also choose which organization to add them to in case you have multiple sub-organizations in place. Once done, you may click this [**+**] and [**Confirm**] buttons.

Upon adding, the members will receive a notification through email. The invitation will also have a note stating that once they joined the organization, their account will be upgraded to whatever plan the Organization owner has. This means that any previously paid plans will be put on hold and only be resumed once they leave the organization. You can also see who the owner is, and the organization name, along with your role. You can either accept or decline the invitation.

Another way to accept the invitation is through the DOCONCHAIN account. Once logged in, they could go to the [**organization invite**] icon to accept the invitation.

If they don't have an account yet with DOCONCHAIN and they are invited to an organization, they will be prompted to the sign-up modal where their name, last name and email will automatically be filled-in and they will be asked for a password. Once signed up, they can proceed with their account.

On the dashboard you can see all the people you added or joined your organization. You can also sort them on the tabs above for the **Joined, Pending, Decline** and **Previous** members**.**

You also have action buttons if you want to resend the invitation, remove or cancel your invite, promote or demote a user.

3) Sub-Organizations

Create sub-organizations under your parent organization. (Video link - 1:51 min)

➢ *Details*

Sub-Organizations are often used if you are managing different groups, departments, companies, or even clients. To add a subgroup, you can click on the [**Create Sub Organization**] button and put the information needed such as the Logo, and Avatar.

You can select the Parent Organization where the sub-org will be under. You can also add the Sub-Organization name, Logo link and other details.

Once done, you may select from the dropdown the Sub-Organization type. We have 4 types, starting off with **Department, Client, Partner,** and **Company**. These labels help you distinguish the sub-organizations you will create.

Once done, you can save it, and you will be prompted to the Sub-organization you just created, where you can either create another sub-org or start adding members.

8. Contacts & Groups

1) Creating Contacts and Contact Groups *(coming soon)*

(Video link – ET 00:30 min)

➢ *Details*