

GOSIGN WEB USER MANUAL

SUMMARY

1	INTRODUCTION	5
2	USERS: TYPES AND PROFILES	7
2.1	FREE PROFILE	7
2.2	BUSINESS PROFILE	7
2.3	ENTERPRISE PROFILE	8
3	LOG IN	9
3.1	USER WHO HAS A "FREE" OR "BUSINESS" PROFILE	9
3.2	FIRST ACCESS	11
3.3	USER WHO HAS AN "ENTERPRISE" PROFILE	12
4	GOSIGN WEB HOMEPAGE	13
5	CONFIGURATION MENU	16
5.1	USERS	16
5.2	TEMPLATE	17
5.2.1	USE OF THE TEMPLATE	18
6	ADDRESS BOOK	19
6.1	VIEW	19
6.2	CONTACT ORGANIZATION	20
6.3	ADDING/MANAGING NEW CONTACT	21
7	ELECTRONIC SIGNATURES	22
7.1	SIGNATURE IMAGE AND INITIALS	22
7.2	SIMPLE SIGNATURE WITH PASSWORD	25
7.3	QUALIFIED REMOTE SIGNATURE CERTIFICATE	26
7.4	SIGNATURE WITH SOFTWARE CERTIFICATE	27
8	TIME STAMPS	28
8.1	USAGE	28
8.2	CONFIGURATION	28
9	CERTIFIED EMAIL	29
9.1	CONFIGURE	29
9.2	USAGE	30
10	REPORT	31
11	USER SETTINGS	32
11.1	PERSONAL INFORMATION	33
11.2	PASSWORD SECURITY	34
11.3	CONTACTS	34
11.4	LANGUAGE SETTINGS	34
12	SUPPORT	35
13	SIGN AND SEND FUNCTION	36
13.1	CONFIGURE PRACTICE	36
13.1.1	UPLOAD DOCUMENTS	36
13.1.2	SETTINGS	37
13.1.3	SELECT SIGNATURE TYPE	38
13.1.4	RECIPIENT SELECTION	38
14	SIGN THE DOSSIER	40
14.1	DOCUMENT PREVIEW	40
14.2	CHOOSE ACTION	40
15	SELECT THE CERTIFICATE AND INSERT THE PIN	42
16	REQUEST SIGNATURE FUNCTION – CREATE DOSSIER	43
17	CONFIGURE THE DOSSIER	44
17.1	UPLOAD DOCUMENT	44

17.2	SETTINGS	44
17.3	RECIPIENT SELECTION	45
17.4	ADDITIONAL ACTIONS FOR RECIPIENTS	46
18	PLACE SIGNATURES	48
18.1	DOCUMENT PREVIEW	48
18.2	CHOOSE ACTION	49
18.3	ADDITIONAL ACTION	50
19	CLOUD STORAGE CONFIGURATION (ONEDRIVE - GOOGLE DRIVE)	51
19.1	UPLOAD DOCUMENTS	51
19.2	HOW TO SET UP A MICROSOFT ONEDRIVE ACCOUNT	52
19.3	HOW TO SET UP A GOOGLE DRIVE ACCOUNT	53
19.4	ADD DOCUMENTS FROM CLOUD STORAGE TO THOSE ALREADY PRESENT ON THE DOSSIER	54
20	ADD PERMISSION TO ASSOCIATE ATTACHMENTS	55
20.1	DEFINITION OF THE DOSSIER	55
20.2	EDITING OF THE ATTACHMENTS OF AN ONGOING CASE	56
20.3	NUMBER OF ATTACHMENTS AND MAXIMUM SIZE	56
20.4	SIGN THE DOSSIER FROM GOSIGN WEB APPLICATION	57
20.5	SIGNING OF THE DOSSIER FROM THE GS BUSINESS MOBILE APPLICATION	60
20.6	CONDITIONS AND LIMITS	64
21	ACCESS CODE: DEFINITION OF ACCESS CODES TO THE PRACTICE	65
21.1	DEFINITION	65
21.2	PIN	66
21.3	OTP SMS	67
21.4	DEFINITION OF THE PRACTICE WITH OTP EMAIL	68
21.5	SIGNING OF THE DOSSIER FROM THE GO SIGN WEB APPLICATION	69
21.6	SIGN THE DOSSIER WITH PIN	69
21.7	SIGN THE DOSSIER WITH OTP SMS	71
21.8	SIGN THE DOSSIER WITH OTP E-MAIL	73
21.9	SIGNING OF THE DOSSIER WITH PIN FROM THE GO SIGN BUSINESS MOBILE APP	76
21.10	SIGNING OF THE CASE WITH OTP SMS FROM THE GO SIGN BUSINESS MOBILE APP	79
21.11	SIGNING OF THE FILE WITH OTP EMAIL FROM THE GO SIGN BUSINESS MOBILE APP	82
22	SIMPLE SIGNATURE WITH PASSWORD	85
23	IMPORT CONTACT FROM CSV AND BULK SEND	87
23.1	THE TEMPLATE	88
23.2	IMPORT CONTACTS	89
23.3	ENABLING BY SUPERADMIN, AUTHENTICATION WITH SMARTCARD	93
23.4	ENABLING BY SUPERADMIN, AUTHENTICATION WITH OTP	94
23.5	ENABLING BY SUPERADMIN, AUTHENTICATION WITH SMARTCARD AND AUTHENTICATION WITH OTP	95
23.6	UPDATING AN EXISTING CONTACT	96
23.7	BULK SEND	97
24	QUICKSTART (FOR USERS WITHOUT DIGITAL SIGNATURE)	99
24.1	QUALIFIED SIGNATURE (PDF) WITH VIDEOCHAT IDENTIFICATION	99
24.2	ADVANCED ELECTRONIC SIGNATURE/SELF ID IDENTIFICATION	111
25	IN PRESENCE SIGNATURE	122
25.1	CONFIGURE THE PRACTICE	122
25.1.1	UPLOAD DOCUMENT	122
25.1.2	SETTINGS	123
25.2	PLACE THE SIGNATURE	124
26	MY DOSSIERS SECTION	125
26.1	LIST OF DOSSIERS	125
26.1.1	DETAILS	126
26.1.2	ACTIONS ON DOSSIERS	126
26.1.3	SEARCH AND FILTERS	129
27	MY SIGNATURE BOOK	130
27.1	LIST OF DOSSIER	130

27.1.1	DETAILS	131
27.1.2	ACTIONS ON PRACTICES	131
27.1.3	SEARCH AND FILTERS.....	134
27.2	SIGNATURE OF THE PRACTICES	134
27.2.1	SIMPLE SIGNATURE	134
27.2.2	QUALIFIED ELECTRONIC SIGNATURE.....	136
27.2.3	QUALIFIED SIGNATURE (PDF).....	136
27.2.4	QUALIFIED SIGNATURE (P7M)	136
27.2.5	WITH CERTIFICATE P12	137

1 INTRODUCTION

GoSign Web is the GoSign WEB application that allows users to create and manage signature and approval processes and to sign their documents online.

Our application is for all companies and professionals who need to sign contracts every day, invoices, offers and other important documents, both for internal and external use.

Thanks to our platform, with few simple clicks you can sign or request the signature of documents from other users, share signed practices via email, and manage the files digitally.

It is the first solution that combines the potential of digital signature and an operating model fully consistent with current regulations with a UX in line with current trends. Thanks to GoSign Web all documents are available in digital format.

Within the application, it is possible to:

- **Create a Signature Process:** upload one or more documents, define the recipients and the type of signature required for each, decide the rules of the process (such as deadline, document class, etc.), place the signatures, and manage everything in real-time from the section "My practices" once the documents have been signed;
- **Sign online:** upload one or more documents, decide the signature format (.pdf, .p7m, etc.), enter the signature actions on the document, and, if desired, the recipient to send the signed document to.

In addition to the core functions mentioned above, GoSign also allows the use of advanced features, available depending on the purchase profile:

- **Transformation of a PDF into a form to fill out:** thanks to the "additional actions" users can define a series of fields to fill in on PDF documents before they are signed by the recipients;
- **Multiple sending:** this feature allows you to send a document with dynamic fields (e.g. name, surname, signature, etc.) to many users at the same time and then manage the signature procedures for each user;
- **Privacy Code:** to protect important practices it is possible to set an access code to agree with the recipient (SMS, mail, etc), which must be entered before accessing the documents;
- **Use of templates:** the user can create document or process templates that can be used;
- **Corporate Policy Management:** it is possible to integrate corporate policies into the processes managed with GoSign;
- **Integration with other trust services:** GoSign allows you to send signed documents via PEC, affix time stamps to signature files, and send all files in compliance with the law, at the end of the process.

❓ In GoSign Web it is possible to use all types of digital signature:

- Simple electronic signature;
- Advanced Electronic Signature: available with software certificate or through the process;
- Qualified Electronic Signature: available both with Remote Signature and with Device.

2 USERS: TYPES AND PROFILES

GoSign Web, according to the needs of its users, offers different account options: **Free Profile, Business Profile and Enterprise Profile**.

Regardless of the working profile, GoSign allows you to sign with the following digital signatures:

1. Simple Electronic Signature;
2. Advanced Electronic Signature;
3. Qualified Electronic Signature.

2.1 FREE PROFILE

All users can register their free account, from InfoCert.it site or GoSign Desktop using InfoCert credentials already active on other services (eg PEC) or create a new account.

With the free account, it is possible to:

- Sign one or more documents online;
- Fill in and add information on the PDF before signing it;
- Directly share signed or approved files;
- Have an online space, My Signature Book, with all documents signed.

2.2 BUSINESS PROFILE

The **Business option for professionals** allows you to get documents signed by your customers faster and manage internal approvals wherever you are, directly online.

With this type of account, which can be activated from eCommerce or via an intermediary platform, there is an administrator account that has the ability to add other users, in addition to all the GoSign features.

In addition to those provided by the free profile, the main functions of this profile are:

- Create Signature Dossiers, select the recipients who will have to sign the documents and enter the required actions on the documents;
- Manage all documents sent for signature to other recipients, through "My Dossiers" section;
- Manage your contacts through the Address book;
- Share documents also via PEC (InfoCert or other providers).

2.3 ENTERPRISE PROFILE

This option is targeted at large companies; in fact, it allows you to sign and share documents directly online, both with customers and suppliers, and manage authorizations and internal practices.

The Enterprise user can access all Enterprise features, including:

- Policy management and signature authorizations;
- Enrichment of the user profile through the definition of roles or the creation of groups;
- Integration of functions with third-party applications;
- Possibility of using the available plugins.

3 LOG IN

To access the GoSign Web portal, there are several alternatives depending on the type of profile.

3.1 USER WHO HAS A "FREE" OR "BUSINESS" PROFILE

This user can access both the web application directly and via desktop software.

- **By browser** on the page <https://gosignweb.infocert.it/>. To access are required the email of an active InfoCert account and Password. To continue, click on the SUBMIT button.

InfoCert
TINEXTA GROUP

English

GoSign: the only complete digital signature solution. Free.

Starter Pack

Software gestionale,
posta certificata,
fatturazione elettronica
e firma digitale a €198 **Just €99**

BUY NOW

Everything you need to start your business

Username
Username

Password
Password

Submit

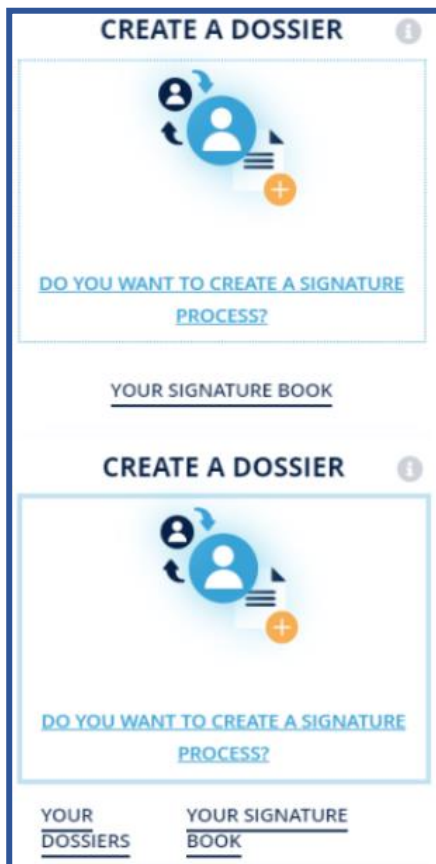
[Can't log in?](#)

Don't have GoSign?
[Find out how to activate it for Free >](#)

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InfoCert S.p.A.
VAT number: IT07945211006

- **Through GoSign Desktop** by clicking on the CREATE A DOSSIER section on the link YOUR SIGNATURE BOOK (if you are working with a FREE account) or on YOUR DOSSIERS or YOUR SIGNATURE BOOK (in the case of a Business account), you will be directly redirected to the page GoSign Desktop web, without logging in (since it has already been done previously on GoSign Desktop).



3.2 FIRST ACCESS

If you are logging in for the first time, before logging into the GoSign Web portal, you will need to set up your personal information. The mandatory ones are:

- **First name;**
- **Last name;**
- **Email;**
- **Time zone;**
- **Email Language.**

Once you have filled in the fields, click CONFIRM to continue.

The screenshot shows the 'Settings' page of the GoSign Web portal. At the top, the user's name 'Mario R.' and 'Free User' status are displayed. The 'SETTINGS' tab is active, and a message states: 'In this section, you can view and edit your profile information.'

The 'PERSONAL INFORMATION' section contains the following fields:

Field	Value
First name*	Mario
Last name*	Rossi
Email*	mario.rossi@infocert.it
Telephone	
Tax code	
Company name	
Organizational unit	
Time zone*	UTC
Email Language*	English

A 'Confirm' button is located at the bottom right of the 'PERSONAL INFORMATION' section.

Below the 'PERSONAL INFORMATION' section are four expandable sections:

- PASSWORD SECURITY
- CONTACTS
- LANGUAGE SETTINGS
- NOTIFICATIONS

3.3 USER WHO HAS AN "ENTERPRISE" PROFILE

The user who has an Enterprise profile can access GoSign through <https://gosign.infocert.it/auth/login>.

InfoCert
TINEXTA GROUP

English Support

GoSign By Öike

Username

Password

Forgot your password?

Login

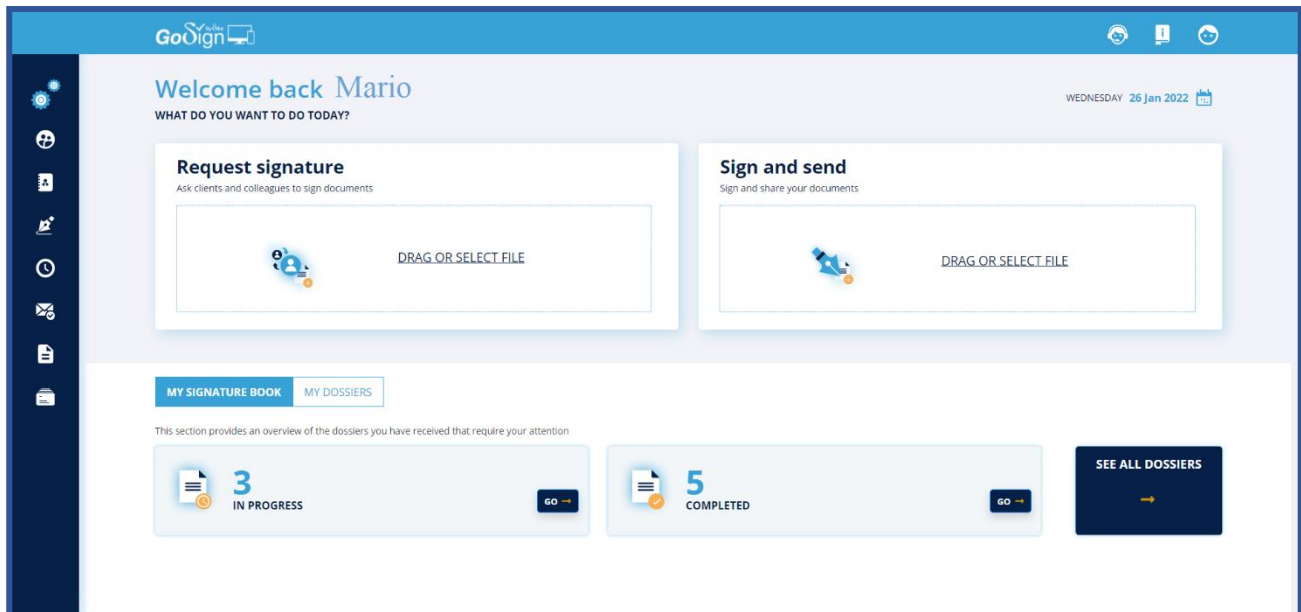
Client Version: 5.15.1 - API Version: 5.15.0.238

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InfoCert S.p.a.
VAT number: IT07945211006

4 GOSIGN WEB HOMEPAGE

All the features offered are visible on the **GoSign Web Home Page**.



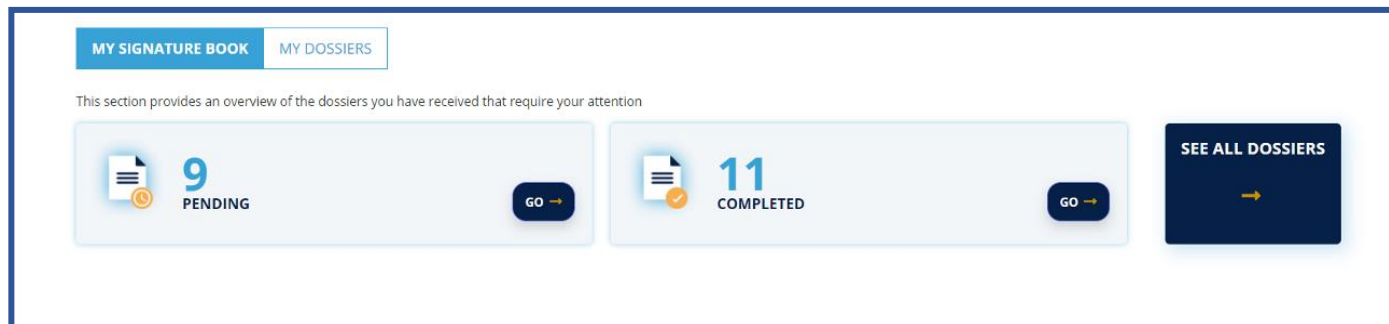
At the top right, there are 3 icons for account management and user assistance:



The 3 signature functions are presented at the top of the screen:

- **Request signature:** This function allows you to send a previously signed document to a recipient who will be asked to sign the document in turn;
- **Sign and Send:** The function gives the possibility to sign a document through a remote signature certificate and then send it directly or archive and catalog it on GoSign Web.
- **In presence signature (ONLY AFTER THE PURCHASE OF THE SPECIFIC SERVICE):** the function allows you to prepare the header of the document which will then be signed via GRAPHO.

In the lower part of the screen, there is a report of the status of the signatures: for example the signatures that have yet to receive a signature from a customer, and the completed files and/or signatures.

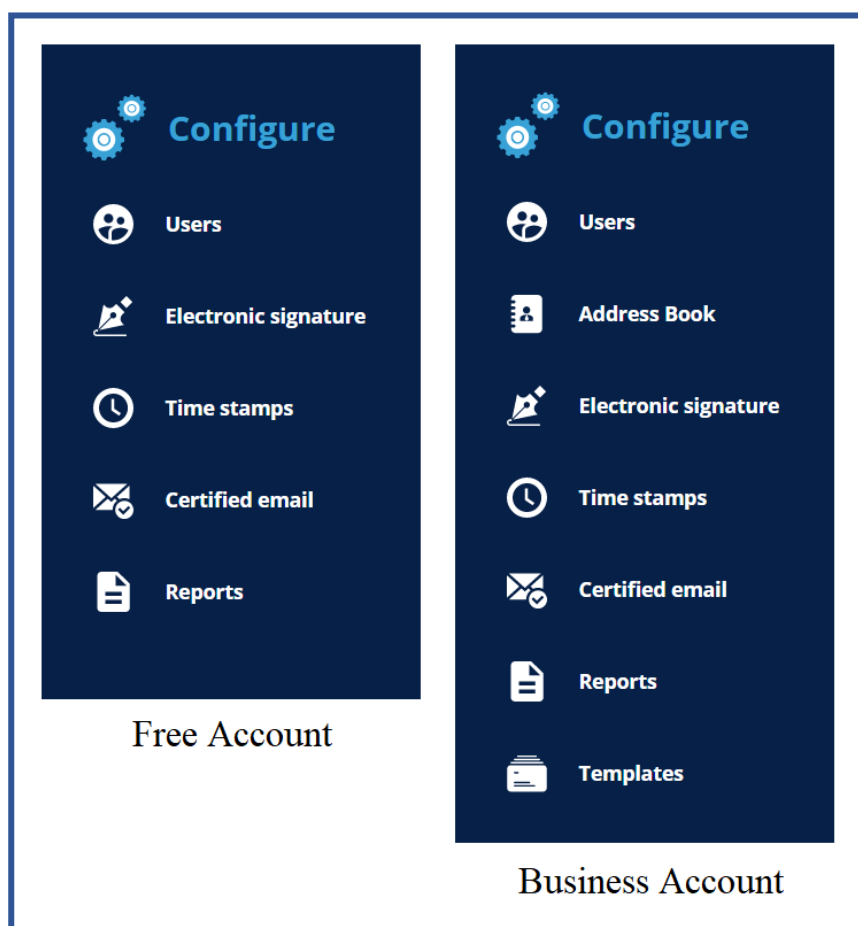


On the left of the home page there is the CONFIGURE menu (indicated by the gear icon); clicking on the icon opens the menu, in which it is possible to configure a series of services that the user has available, according to the type of profile purchased.

The TABs common to all GoSign profiles are:

- Users;
- Electronic signature;
- Time stamps;
- Certified email;
- Reports.

In the case of a Business account, the configurations of "Address Book" and "Templates" are also available.



5 CONFIGURATION MENU

5.1 USERS

The Users section is found in the “CONFIGURE” menu.


The Users section displays the entire list of users who can use GoSign Web, in full functionality.

Users

In this section, you can find information on Users and buy new ones

USER MANAGEMENT

You are using 1 of 1 available users [BUY NEW USERS](#)

NAME	LAST ACCESS	STATUS	ACTIONS
 Mario Rossi mriorossi@infocert.it	27.01.22 10:05	-	-

The information relating to users are:

- **Name and email** linked to the account;
- **Last access with date and time** to GoSign Web;
- **Status of the account** if it is active or with certificates that are expiring or not yet assigned;
- **Actions** that can be performed on the user's account.

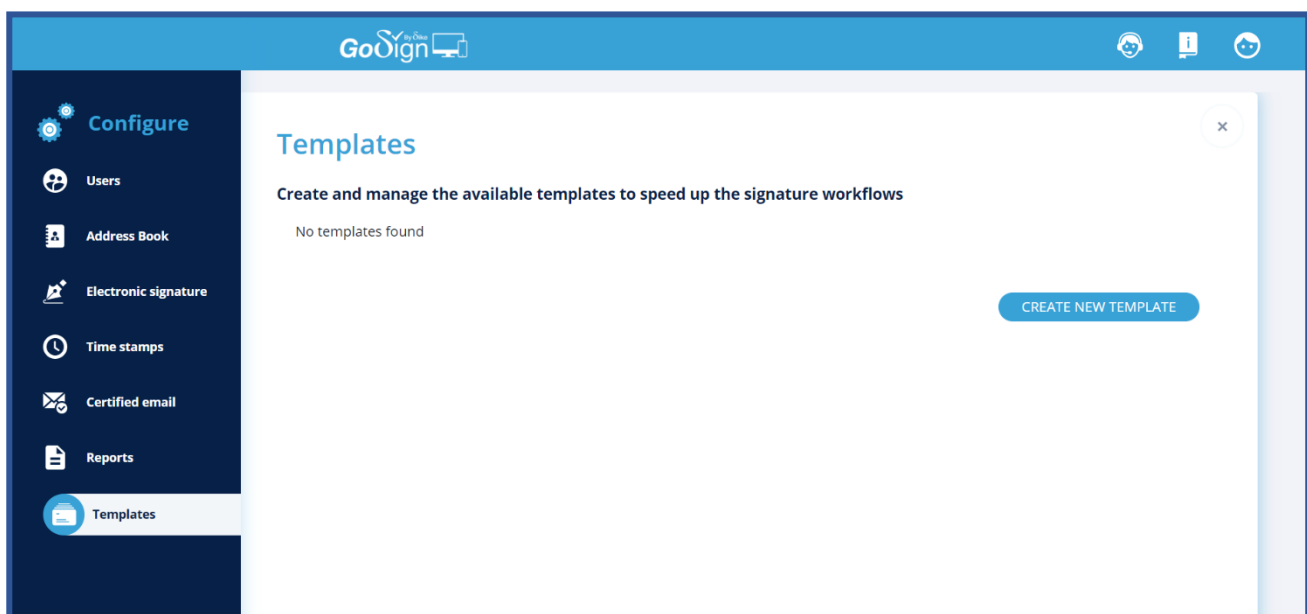
If you need to add new users, just click on BUY NEW USERS; in this way, you will be redirected to the InfoCert Store to continue with the purchase.

5.2 TEMPLATE

The "Templates" function will be available in the configuration menu, which allows you to access a mask through which to create a new model / template.

By clicking on the Create a new template button, it will be possible to simplify the signature processes by setting:

- Documents;
- Recipients;
- Actions.



You can choose whether or not to upload documents (by choosing to click on "I don't want to upload the documents now"). In both cases, you can always define the name of the dossier and the deadline.

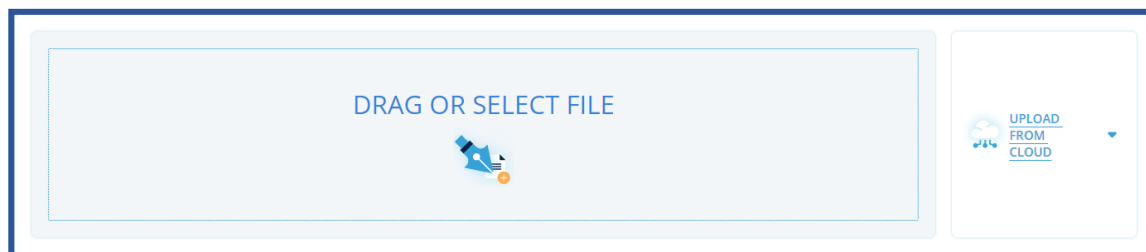
The selection of recipients is also not mandatory; if the recipients are selected, it will be necessary to choose the actions we want them to finalize:

- Action required (e.g. signature)
- Type of signature
- Additional actions (customization of notification e-mails, insertion of recipients in CC, configurations of automatic tasks such as sending e-mails, automatic signatures). By clicking on "Save model", the model will be correctly saved with the information of the case previously set.

If you have decided to attach a document, you will be redirected to the mask useful for placing the tags on the documents; once positioned, you can proceed to save the model.

5.2.1 USE OF THE TEMPLATE

The template can be used by selecting it in the appropriate section of the side menu, or, in the **Request signature process** using the "USE TEMPLATE" function.



In both cases (USE TEMPLATE from the side menu or REQUEST SIGNATURE), after selecting and confirming a template to use, you are redirected to the practice creation mask, which will create a practice in DRAFT, with all the preset data taken from the model. The dossier, in the creation phase from the model, will therefore be completely customizable by the user who is composing it (the model does not constrain customizations).

If a dossier in draft has been created starting from a template, the system will show the initial template and any inconsistencies in the process: the validation of the dossier follows the rules already in place on the page REQUEST SIGNATURE. Once sent, it will no longer be possible to track the information relating to the starting template.

Finally, you can decide whether to modify or delete the template; the two operations of MODIFY and DELETE once confirmed, are irreversible.

Templates

Create and manage the available templates to speed up the signature workflows

Find a template

Find a template

Documents present

Document class present

Actions present

Name	Data creation / edit	Status	Set elements
PROVE	Created on Jan 27, 2022 Changed on Jan 27, 2022	Draft	
<div>Documents</div> <div>USE TEMPLATE EDIT DELETE COPY</div>			
<div>Document class</div>			
<div>Actions</div>			
PROVE 2	Created on Jan 27, 2022 Changed on Jan 27, 2022	Draft	
PROVE 3	Created on Jan 27, 2022 Changed on Jan 27, 2022	Draft	

Results per page 5 1 - 3 of 3 |< < > >|

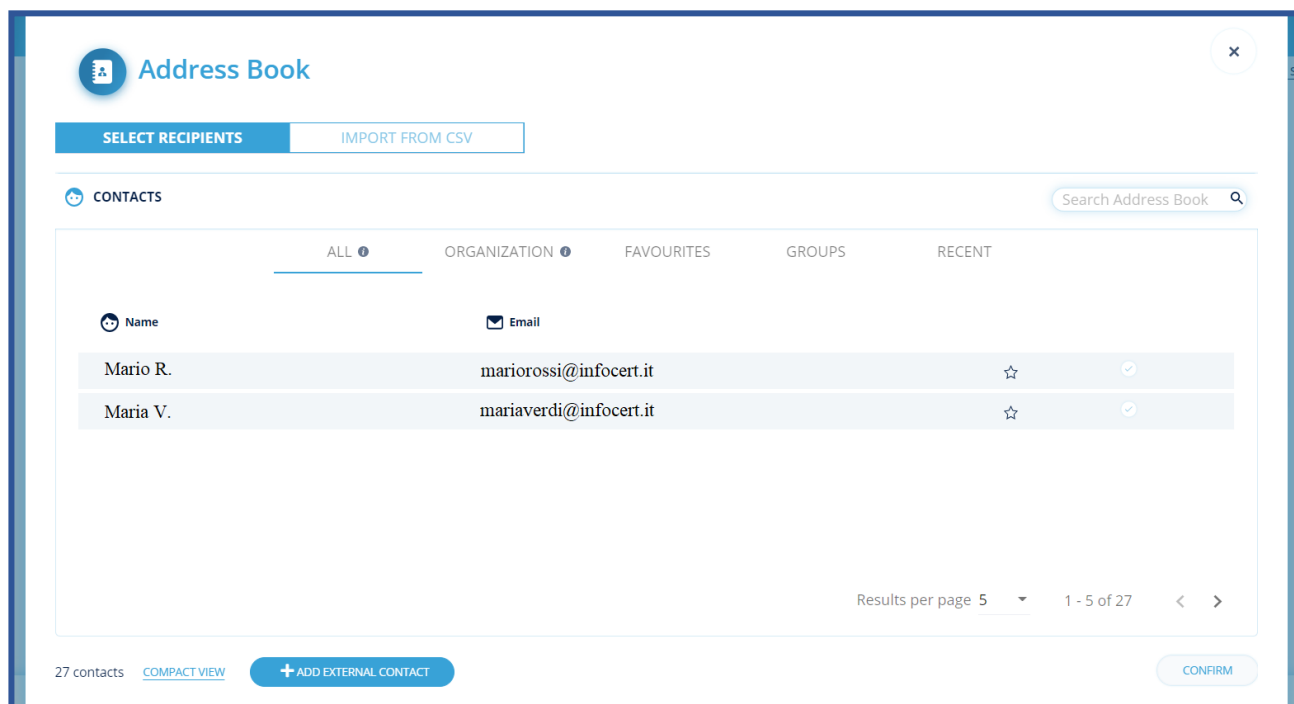
6 ADDRESS BOOK

This icon is visible in the functions Sign and Send, Request Signature, and In presence signature. It is indicated by an icon representing an address book; with this feature, you can search for a contact in a faster and more organized way.



6.1 VIEW

The address book opens as a popup showing the complete list of the organization's contacts with their respective Names and e-mails: by clicking on the star icon, there is the possibility to add contacts to favorites.



To add one or more contacts as recipients of the email that will contain the document to work on, it is necessary to click on the line where's the contact, highlight it, and click on CONFIRM.

To add a new contact, at the bottom left, it is necessary to click on "Add external contact": some mandatory data will be requested, name, last name, email address, language (language in which the contact will receive communications from GoSign), telephone, others optional, such as country, type of document and tax code.

6.2 CONTACT ORGANIZATION

There are 3 other screens to view your contacts: Favorites, Groups and Recent.

- *Favorites*: In this screen, there are all those contacts that are marked with the filled star icon.

Roberto	robertorossi@infocert.it	★
---------	--------------------------	---

- *Groups*: contain two or more contacts together. In this way, it is possible to select a certain number of contacts who have something in common with a single selection, without having to search for each individual contact (for example the Marketing department group includes all the contacts that work in Marketing).
- *Recent*: varies over time, depending on the contacts that were used last.

To find a contact more quickly there is a search box in which you need to type either the name and/or surname or the email of the contact you are looking for.

6.3 ADDING/MANAGING NEW CONTACT

To add a new contact, just click on the ADD CONTACT button. The form for entering a new contact requires you to enter mandatory datas:

- **Name and Last Name** of the new contact;
- **Email address**;
- **Language**.

It's also possible to add some optionals informations.

Once entered, click on SAVE to confirm the creation of the new contact.

ENTER CONTACT

Name *

Last Name *

Email Address *

Language *

Telephone

Country

Document Type

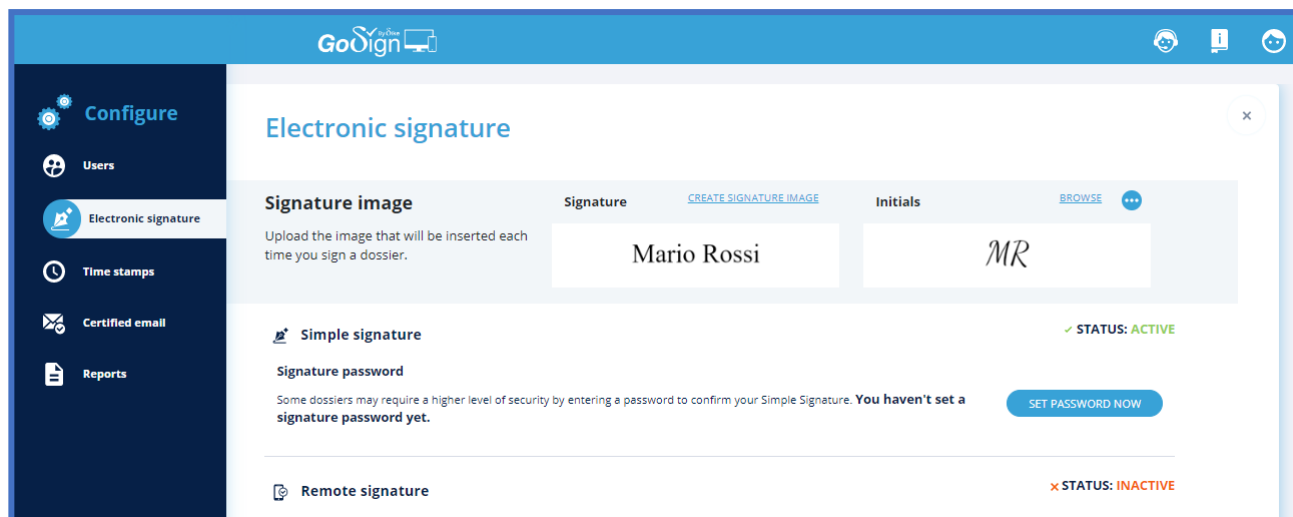
Fiscal Code

Fiscal Code

SAVE

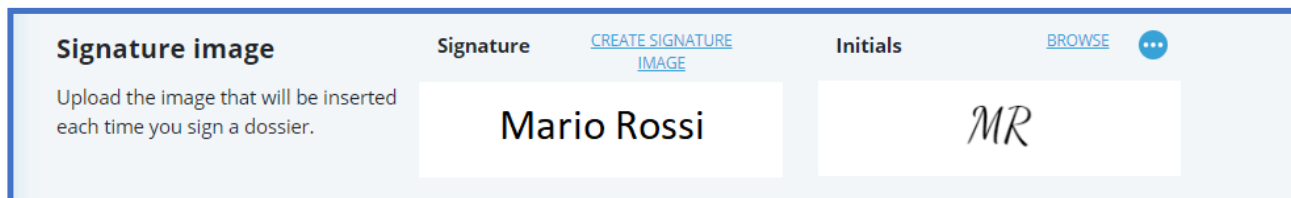
7 ELECTRONIC SIGNATURES

Your Signatures section is within the CONFIGURE menu. This section is marked with the signature icon.



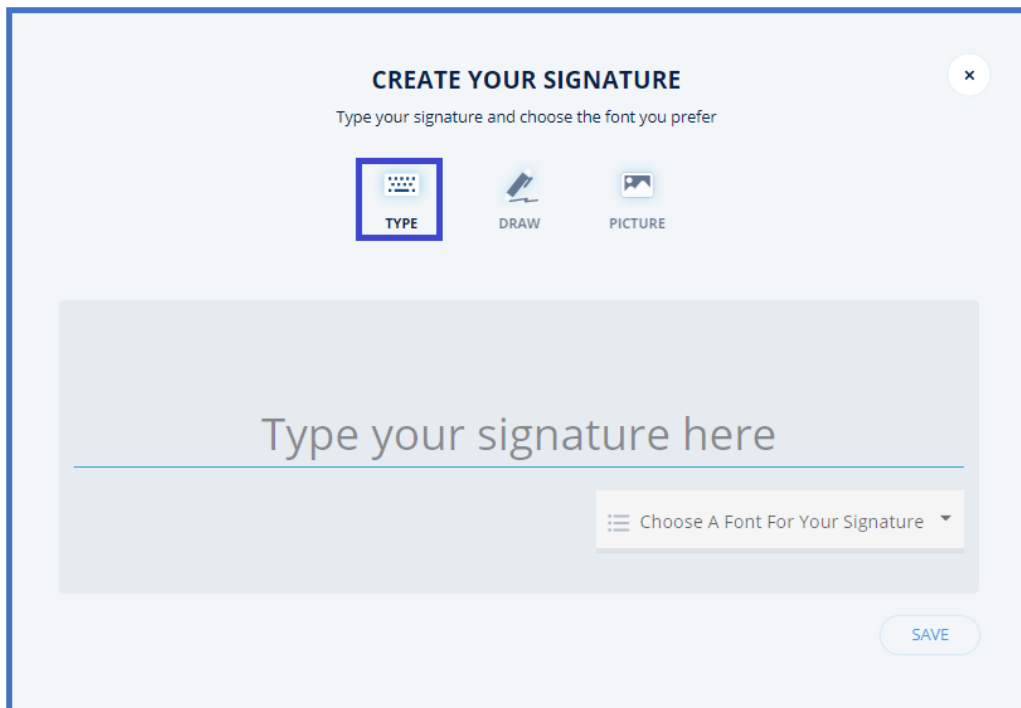
7.1 SIGNATURE IMAGE AND INITIALS

In the upper part of the section, there is the Signature image, where there are two input boxes that will contain graphic representation displayed on the documents once signed.



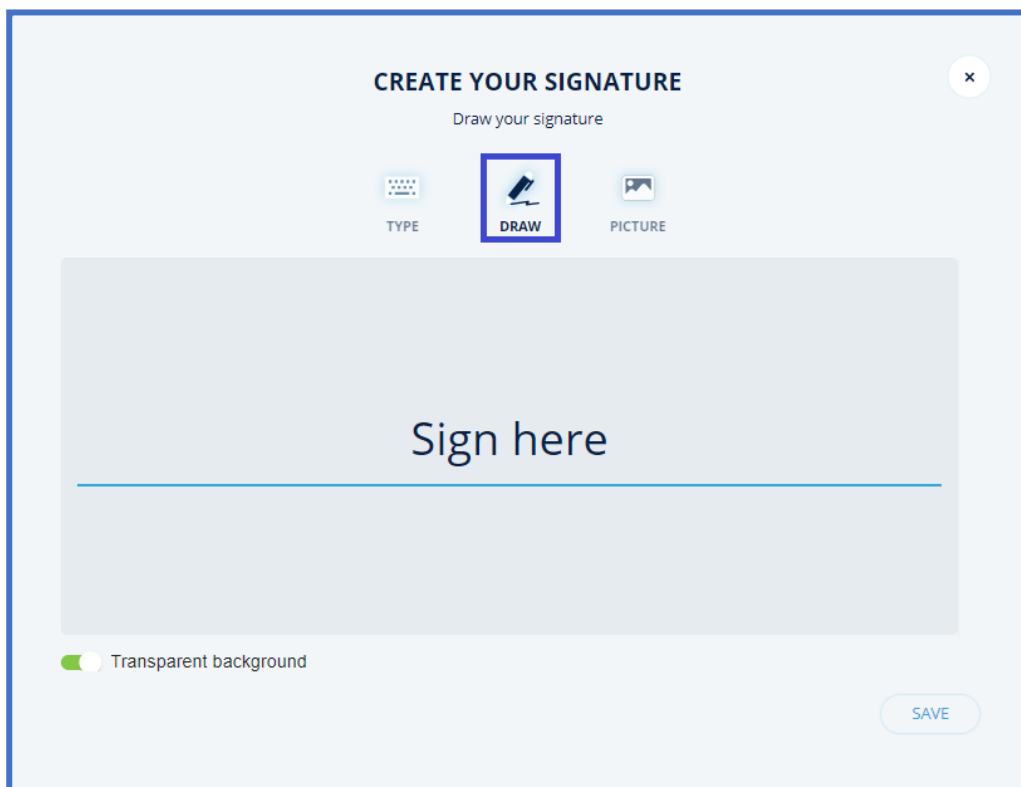
By clicking on *Create Signature Image* you can:

- type your signature, then choose a font for the signature at the bottom right.



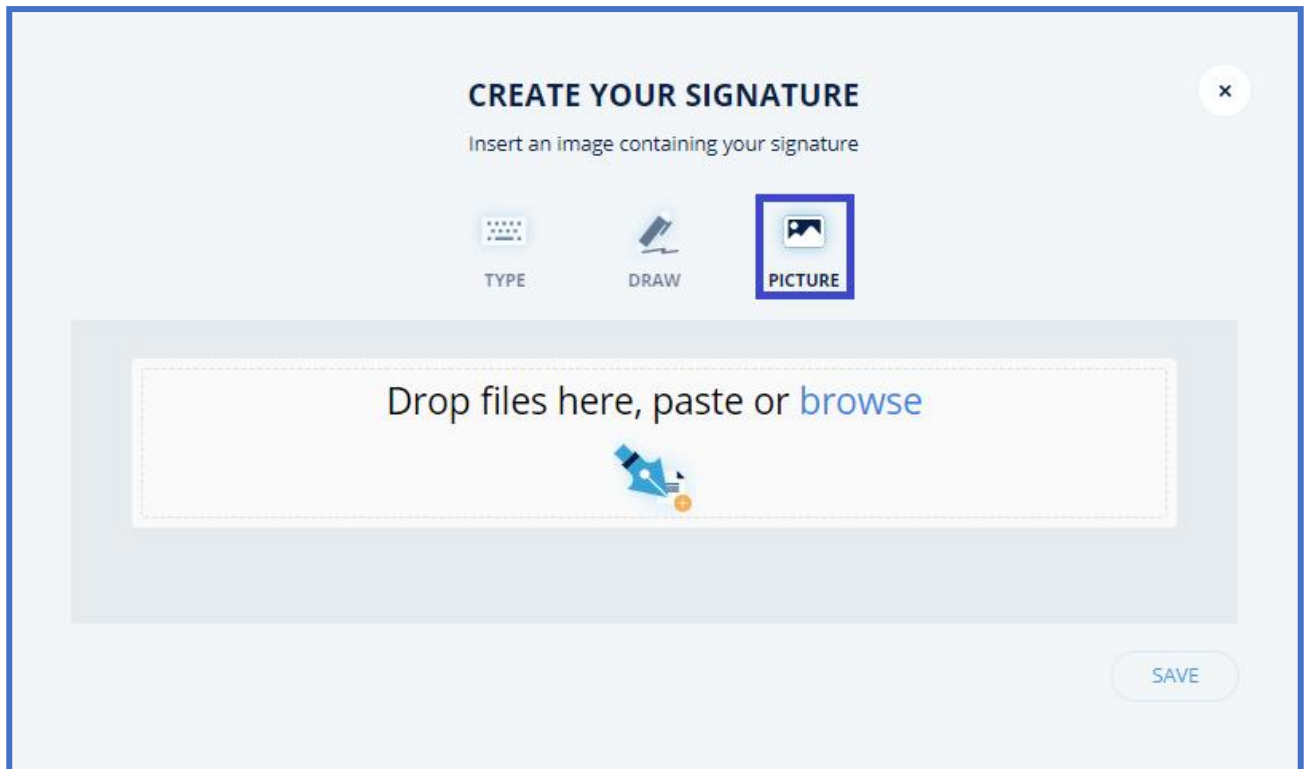
The screenshot shows a web interface titled "CREATE YOUR SIGNATURE" with a close button (X) in the top right corner. Below the title is the instruction "Type your signature and choose the font you prefer". There are three tabs: "TYPE" (highlighted with a blue border), "DRAW", and "PICTURE". The main area is a large light blue box containing the text "Type your signature here" and a horizontal line. To the right of the line is a dropdown menu labeled "Choose A Font For Your Signature". A "SAVE" button is located at the bottom right.

- draw your signature;



The screenshot shows the same "CREATE YOUR SIGNATURE" interface, but now in "DRAW" mode. The "DRAW" tab is highlighted with a blue border. The instruction "Draw your signature" is displayed. The main area is a large light blue box containing the text "Sign here" and a horizontal line. At the bottom left, there is a toggle switch labeled "Transparent background" which is currently turned on. A "SAVE" button is located at the bottom right.

- caricare una propria immagine di firma.



The screenshot shows a web interface titled "CREATE YOUR SIGNATURE" with a close button (X) in the top right corner. Below the title is the instruction "Insert an image containing your signature". There are three selection options: "TYPE" (represented by a keyboard icon), "DRAW" (represented by a pen icon), and "PICTURE" (represented by a picture icon and highlighted with a blue border). Below these options is a large dashed rectangular area containing the text "Drop files here, paste or [browse](#)" and a blue pen icon. At the bottom right of the interface is a "SAVE" button.

Once you have chosen the type of signature, you will need to click on the *Save* button to confirm the operation.

GoSign Web allows to insert your initials.

The initials can be loaded by clicking on BROWSE, or it is possible to auto-generate them by clicking on the 3 dots icon and writing the initials.

7.2 SIMPLE SIGNATURE WITH PASSWORD

It is possible to set the simple signature with password to guarantee an additional level of security when confirming the signature; by clicking on Set password now, you can proceed to set the chosen password.

When the password has been set, the verification code received by email must be entered in the provided space.

The simple signature with password will be active and ready to be used.

The screenshot shows the 'Electronic signature' configuration interface. On the left is a sidebar with navigation links: Configure, Users, Electronic signature (selected), Time stamps, Certified email, and Reports. The main content area has a title 'Electronic signature' and a close button. It contains three sections: 'Signature image' with 'Signature' (text: Mario Rossi) and 'Initials' (text: MR) fields; 'Simple signature' with a 'Signature password' field and a 'Verification code' field, and a 'Remote signature' section with a 'Remote signature password' field. The 'Simple signature' status is 'ACTIVE' and the 'Remote signature' status is 'INACTIVE'.

7.3 QUALIFIED REMOTE SIGNATURE CERTIFICATE

Under the SIMPLE SIGNATURE section, there is a section for configuring the remote signature certificate.

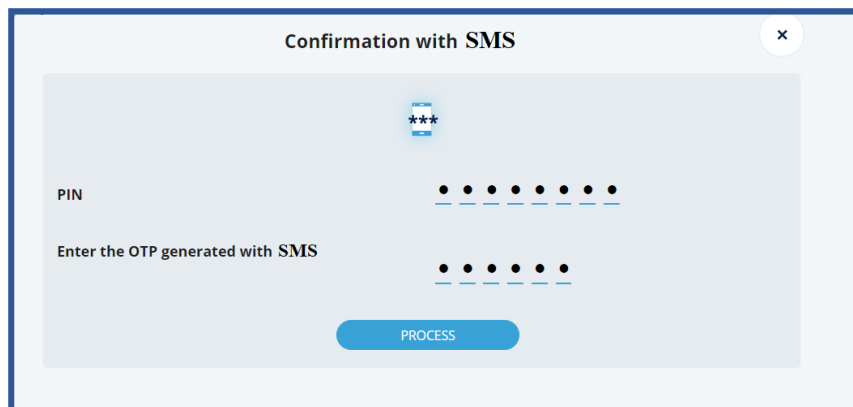
The screenshot shows the 'Remote signature' configuration form. It includes a title 'Remote signature' and a status 'INACTIVE'. Below the title is a message: 'Please enter your credentials to access the https://mysign.infocert.it portal'. There are two input fields: 'Signatory's UserID or email' (value: NCFRXXX) and 'Remote signature password'. There is a 'Save credentials' checkbox and a 'FORGOT PASSWORD' link. A 'BUY REMOTE SIGNATURE' button is also visible.

Within this area it is possible to enter:

- The email of the signatory or Signature User id which is related to the account that purchased the service (this email is issued to the user by InfoCert at the time of the certificate request, it can be found on the copy of the Registration Request delivered on that occasion);
- The Password (which corresponds to the password used to access the portal dedicated to holders of a remote certificate, My Sign, and must be customized when activating the certificate).

Once you have entered your credentials on the Add button, it will be open a confirmation pop-up, where you will be asked to enter the remote signature PIN and the OTP code (which you will receive on the telephone number associated with the remote signature certificate).

Once all the codes have been entered to activate the certificate, click on PROCESS.



A confirmation dialog box titled "Confirmation with SMS" with a close button (X) in the top right corner. The dialog contains two input fields: "PIN" and "Enter the OTP generated with SMS". Each field has a series of dots for input. Below the fields is a blue button labeled "PROCESS".

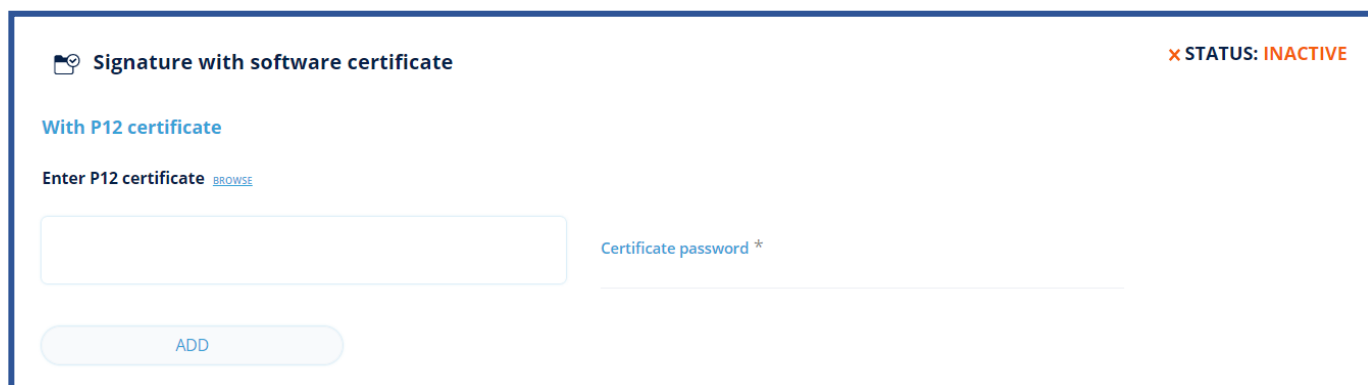
In the same panel, you can remove a remote signature by clicking on the trash icon.

7.4 SIGNATURE WITH SOFTWARE CERTIFICATE

The last section is used for configuring the Signature with software certificate.

To upload the certificate, click on BROWSE and recall the p12 certificate file in the software. Once uploaded, you will be prompted for the password to activate the certificate. To proceed with the configuration, click on ADD.

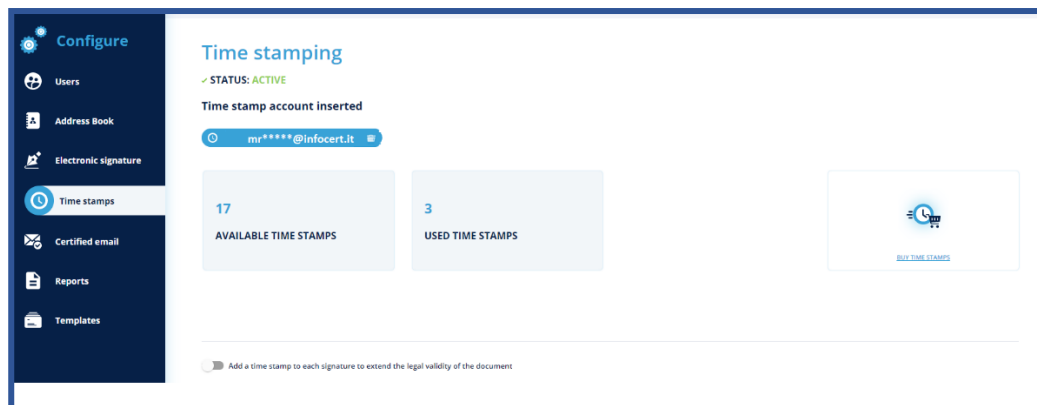
Once the certificate has been uploaded, you can see the path where the certificate was saved and a trash icon that allows you to delete it.



A configuration panel titled "Signature with software certificate" with a status indicator "STATUS: INACTIVE" in the top right corner. The panel includes a section "With P12 certificate" and a label "Enter P12 certificate" followed by a "BROWSE" link. Below this is a text input field for the certificate path and a label "Certificate password *" followed by a password input field. At the bottom is a blue button labeled "ADD".

8 TIME STAMPS

The *Time Stamps* section is found in the CONFIGURE menu. This section is marked with the time stamps icon.



8.1 USAGE

Time Stamps are necessary if you want to prove - or validate - the existence of a document on a certain date.

8.2 CONFIGURATION

To configure the time stamps account on GoSign Web, you are asked to enter: *User name* (provided by InfoCert services at the time of purchase), *Password* and *Address*. During the configuration, it is possible to activate the option by which a time stamp is added to each signature to extend the legal validity of the document.

Once you have entered your credentials to configure the account, just click on ADD. Once configured, it is displayed the status of the time stamps for that account (AVAILABLE TIME STAMP and USED TIME STAMPS). If you want to add another time stamps, just click on the cart icon, to be redirected to the InfoCert Store.

9 CERTIFIED EMAIL

The Certified Email (PEC) section is found in the CONFIGURE menu. This section is marked with an email icon.

9.1 CONFIGURE

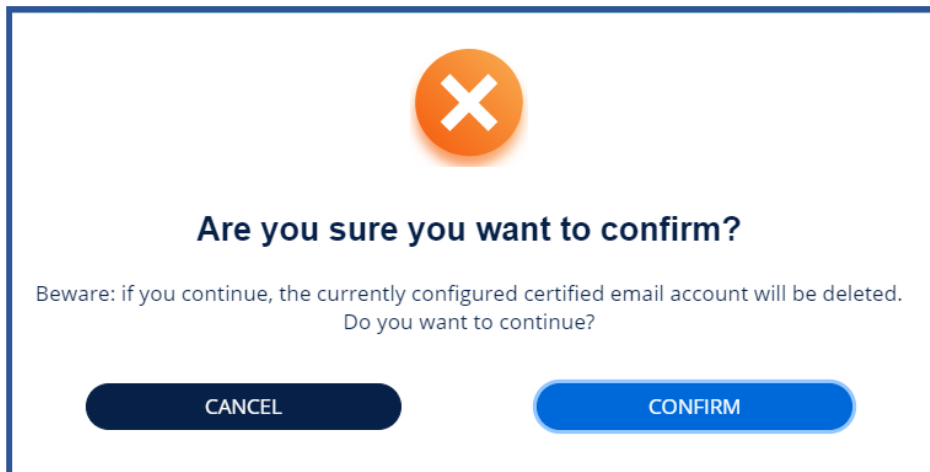
InfoCert offers a Certified Email (PEC) service (it is recommended to have a Certified Email with InfoCert).

To configure the PEC you need to enter:

- **Name;**
- **Certified Email;**
- **The mail server on which the Certified mail is supported;**
- **SMTP port;**
- **Choose the type of encryption you want to apply;**
- **Username;**
- **Password;**

9.2 USAGE

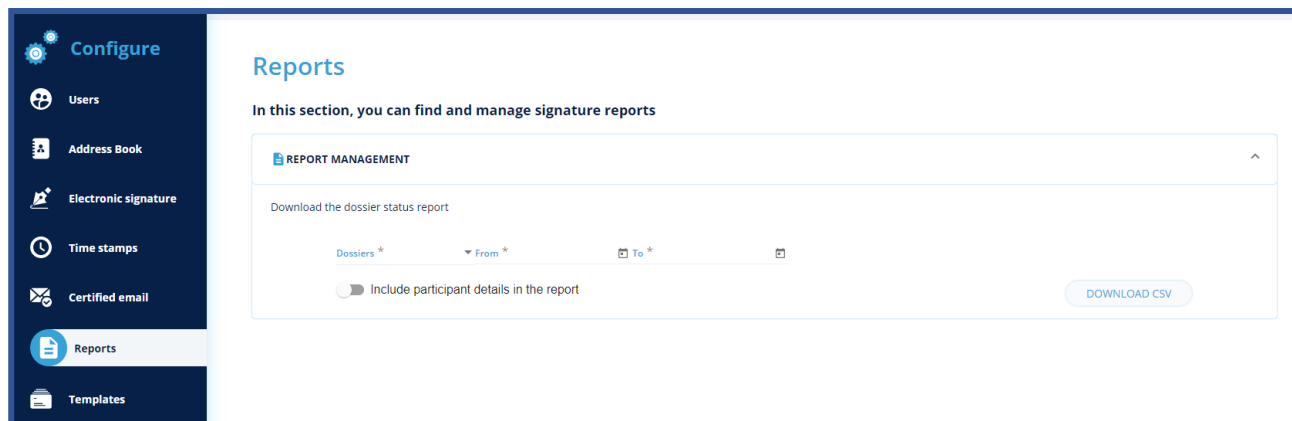
In the Certified Email section, it is also possible to delete the account, by clicking on the *CERTIFIED EMAIL INFORMATION* link.



If you do not have a Certified Email available, just click on "Buy Certified Email Account", to view all the offers and proposals of InfoCert.

10 REPORT

The Report section is found in the CONFIGURE menu. This section is marked with a document icon.



In this section, it is possible to download all the details relating to the practices that meet the parameters that are set.

The parameters are:

- **Dossiers:** we ask you to select the type of dossiers for which we want to have a report, which can be OPEN, CLOSED, or ALL.
- **Time frame** that we are interested in covering.

It is also possible to include all the details of the participants who collaborated in that dossier.

By clicking on DOWNLOAD CSV, will be downloaded an EXCEL file.

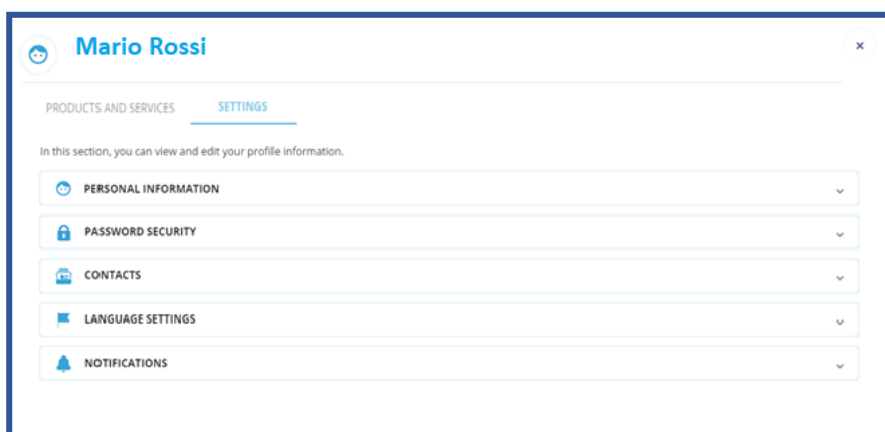
11 USER SETTINGS

At the top of the home page there are three icons representing "User Assistance", "more information about InfoCert's products/services", and "Personal settings".



There's the possibility for the user to modify some data relating to his account, through the "Personal Settings".

By clicking on the face icon it will be visible a drop-down menu with the options Settings and *Logout*, concerning the information relating to the account and some **GoSign Web** configurations.



11.1 PERSONAL INFORMATION

In this section the user can change his personal data, the email linked to the account, the language in which he wants to write the emails (there are 6 different languages: **French, English, Italian, Portuguese, Spanish, German**), and the Time zone, that is the time zone that you want to apply while applying time stamps.

The screenshot shows a web form titled "PERSONAL INFORMATION" with a blue header bar containing a user icon and an expand/collapse arrow. The form is organized into two columns. The left column contains fields for "First name*" (filled with "Mario"), "Personal settings", "Telephone", "Company name", and "Time zone*" (filled with "UTC" and a dropdown arrow). The right column contains fields for "Last name*" (filled with "Rossi"), "Email*" (filled with "mr*****@infocert.it"), "Tax code", "Organizational unit", and "Email Language*" (filled with "English" and a dropdown arrow). A blue "Confirm" button is located at the bottom right of the form.

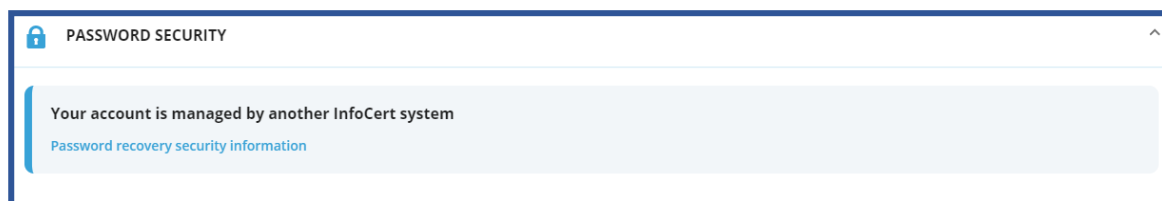
Field	Value
First name*	Mario
Last name*	Rossi
Personal settings	
Telephone	
Company name	
Time zone*	UTC
Email*	mr*****@infocert.it
Tax code	
Organizational unit	
Email Language*	English

Confirm

11.2 PASSWORD SECURITY

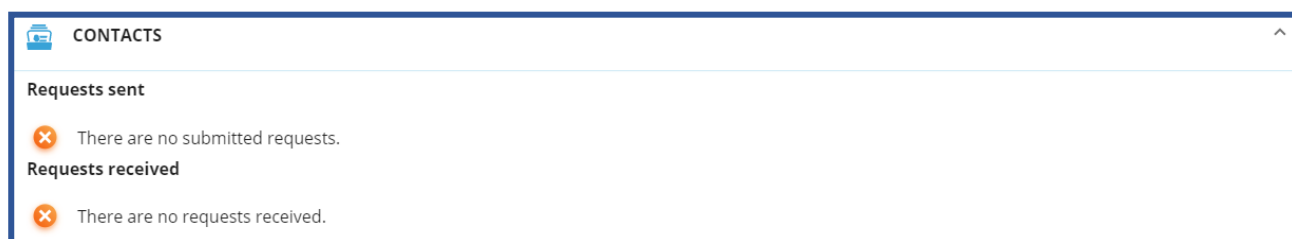
If you are working with an administrator account you will have the option to reset the password and see all the security information for password recovery.

On the other hand, if you are working with an account managed by an administrator, it will be available a link that gives information on password recovery.



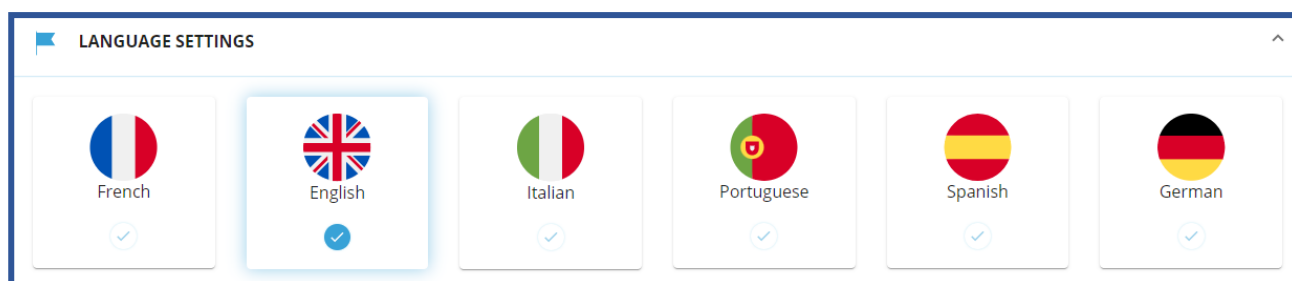
11.3 CONTACTS

The Contacts section displays all the sent and received requests for adding new contacts.



11.4 LANGUAGE SETTINGS

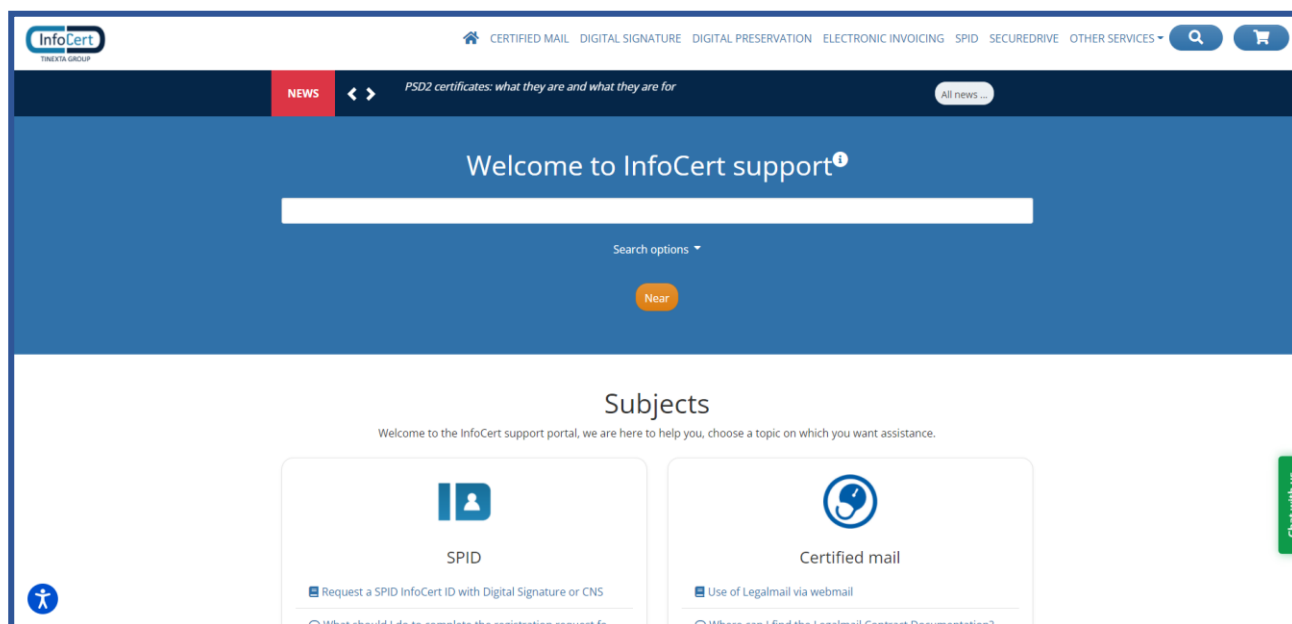
GoSign Web can be translated into 6 different languages, this allows ease of use even for international users.



By clicking on Products and Services then, you can view all the products offered by InfoCert and the dedicated offers.

12 SUPPORT

If the user needs further explanations on how **GoSign Web** works, by clicking on the face icon with the microphone, you will be redirected to the browser page <https://help.infocert.it/>.



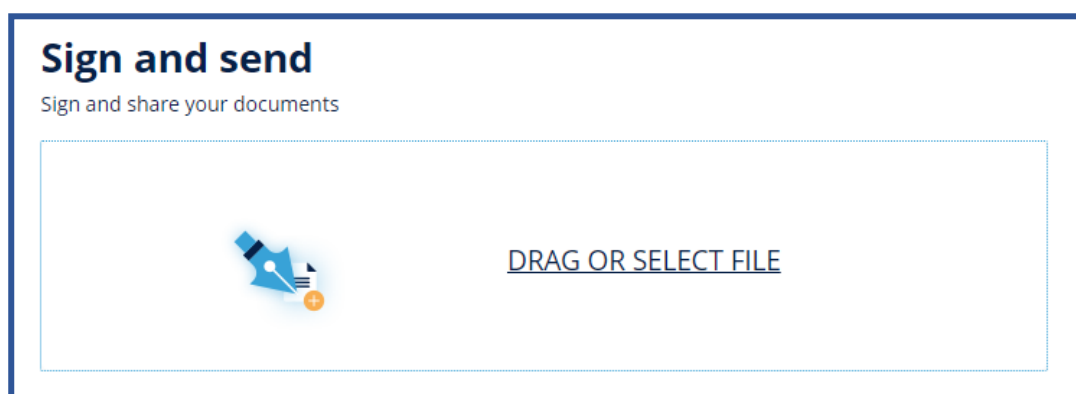
13 SIGN AND SEND FUNCTION

The **Sign and Send function** allows you to sign documents and send them to other users who need to sign that document, or to the end-user (e.g. a customer waiting for a contract, etc.).

13.1 CONFIGURE PRACTICE

13.1.1 UPLOAD DOCUMENTS

To upload a document, simply click on the function icon on the home page.



With **GoSign Web** you have the possibility to upload any type of file (*.pdf, .doc, .xls, .jpg, documents in .p7m format*) and it is possible to upload multiple documents at the same time.

13.1.2 SETTINGS

Once the document (or documents) has been uploaded, by default is set a dossier number; the deadline or the date by which the practice must be concluded (by clicking on the calendar icon you can set the date) the trash icon allows you to remove the document; the eye icon gives you the possibility to view the loaded document.

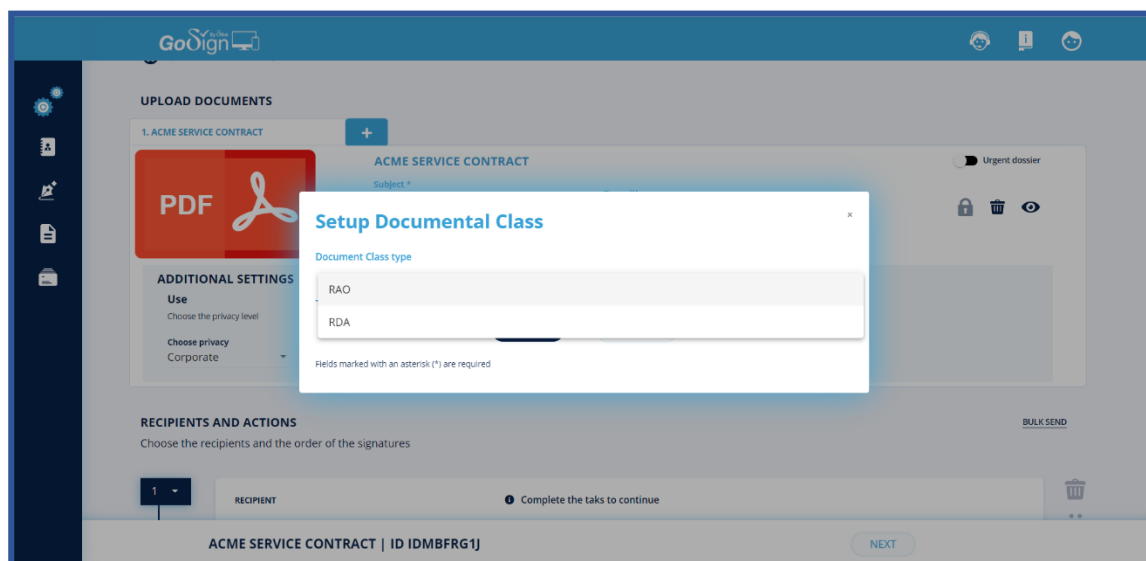
To add further priority to the dossier, you need to activate the Urgent dossier box.

By clicking on “Other Settings”, you change some parameters:

- **Privacy level:** privacy can be set as CORPORATE (indicates that the file is for internal use); PUBLIC (which can also be viewed outside the company); CONFIDENTIAL; STRICTLY CONFIDENTIAL.
- **Document class** (available only for enterprise users): by clicking on "NONE→ SET DOCUMENT CLASS" the enterprise user can choose the type of document class between Customer Offer, RAO, RDA.

In the last case, the user company can choose the type of document class from: Customer Offer, RAO, RDA.

By clicking on RDA (Purchase Request) → The user must enter some information such as: amount (mandatory), date, order number, name of the supplier.



13.1.3 SELECT SIGNATURE TYPE

There are four signatures that can be affixed to the files; however, the only ones that have a legal value are the PDF Digital Signature and the P7M Digital Signature.

If the file is a document with the .p7m extension, the only possible option is the P7M Digital Signature.

To select the type of signature, simply click on one of the boxes below.



13.1.4 RECIPIENT SELECTION

To set the recipients who will receive the signed documents, you have two options:



- Type the email within the box;
- By clicking on the *address book*, where you can choose the recipients with a click.

You can delete a recipient by clicking on "x". To proceed with the dossier, click on NEXT.

SET RECIPIENTS WHO WILL RECEIVE SIGNED DOCUMENTS

Mario Rossi x



14 SIGN THE DOSSIER

14.1 DOCUMENT PREVIEW

On the right side of the screen, there's a preview of the document.

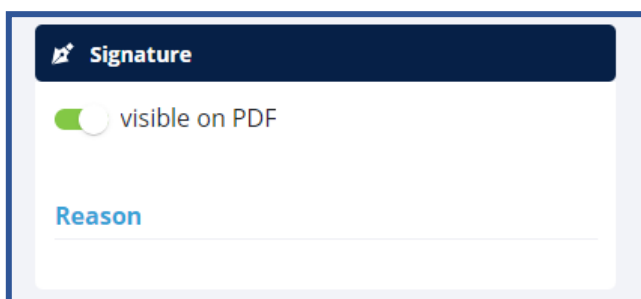
It is possible to change the display mode by clicking on the first icon on the left; zoom on the document; print the document; search within the document.

If there are several documents, to switch from one document to another, click on the tab that contains the name of the document you want to see.

14.2 CHOOSE ACTION

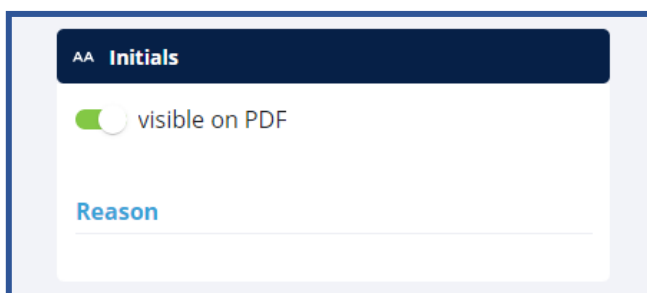
On the left of the document preview, placing the icon on the document preview itself, you can choose between those actions:

- *Signature*: by clicking on the document preview, you can place the signature. It is also possible to set whether or not you want to make the signature visible on the document and how it appears.



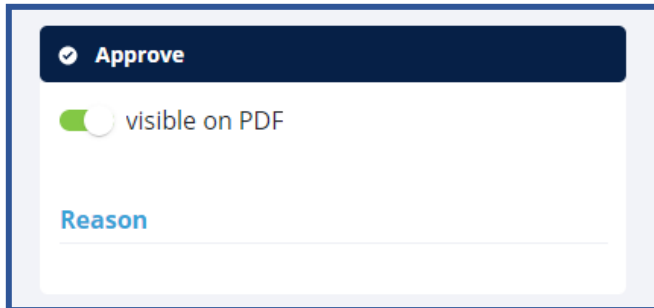
The screenshot shows a dark blue header bar with a signature icon and the text "Signature". Below the header, there is a toggle switch labeled "visible on PDF" which is currently turned on (green). At the bottom, there is a text input field with the placeholder text "Reason" in blue.

- *Initials*: clicking on the document preview and placing the icon, it will be possible to set if you want to make the initials visible on the document or not;




The screenshot shows a dark blue header bar with the text "Initials". Below the header, there is a toggle switch labeled "visible on PDF" which is currently turned on (green). At the bottom, there is a text input field with the placeholder text "Reason" in blue.

- *Approve*: this icon allows you to indicate that the document has been approved by the user who is sending the dossier;

A screenshot of a form titled 'Approve' with a checkmark icon. It features a toggle switch labeled 'visible on PDF' which is currently turned on. Below the toggle is a text input field with the placeholder text 'Reason'.

- *Acknowledgment*: this icon allows you to indicate that the document has been viewed by the user who is sending the dossier.

A screenshot of a form titled 'Acknowledgment' with an eye icon. It features a toggle switch labeled 'visible on PDF' which is currently turned on. Below the toggle is a text input field with the placeholder text 'Reason'.

- *Additional action*:

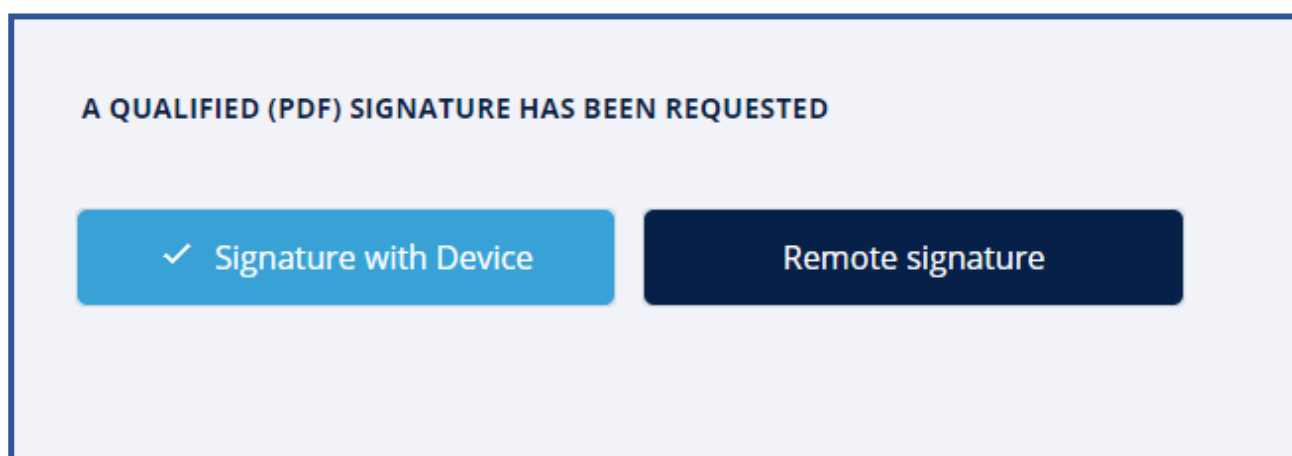
If deemed necessary, it is possible to add additional information on the document, by double-clicking on it, such as: Name, Surname, Text field (to be filled), Date of approval.

15 SELECT THE CERTIFICATE AND INSERT THE PIN

In the case of a PDF digital signature, P7M digital signature, it is necessary to specify which type of signature must be affixed to the file: you can choose between Signature with Device or Remote Signature.

With the remote signature, the operation will be successfully completed by entering the remote signature PIN (previously set) and OTP code (received as a notification on the GoSign Free app or via SMS)

With the Signature with Device option, you need to make sure that the device is correctly connected to the laptop and enter the PIN to authorize the signature.



In case of signing with P12 certificate, you need to specify if you want to sign with:

- **GoSign Desktop**, if the certificate is uploaded to the GoSign Desktop app; the operation is authorized by entering the remote signature PIN (previously set) and OTP code (received as a notification on the GoSign Free app);
- **Sign with Certificate**, if the certificate itself has been uploaded to GoSign Web; here, the P12 certificate and password must be entered.

Once you have chosen the type of signature, to continue, click on the NEXT button.

The next screen will confirm whether or not the operation is complete.

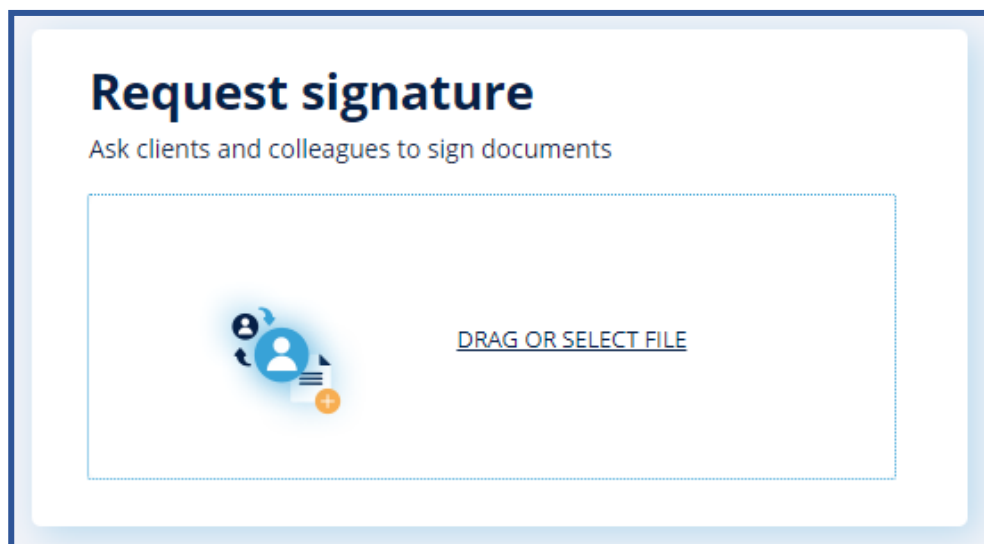
16 REQUEST SIGNATURE FUNCTION – CREATE DOSSIER

The function allows you to send documents to multiple recipients, to request their signature on the documents included in the file.

17 CONFIGURE THE DOSSIER

17.1 UPLOAD DOCUMENT

To upload a document, click on the function "Request signature" on the home page.



With GoSign Web you have the possibility to upload any type of file (.pdf, .doc, .xls, .jpg, documents in .p7m format) and it is possible to upload multiple documents at the same time.

17.2 SETTINGS

Once the document (or documents) has been uploaded, by default is set a dossier number; the deadline or the date by which the practice must be concluded (by clicking on the calendar icon you can set the date) the trash icon allows you to remove the document; the eye icon gives you the possibility to view the loaded document.

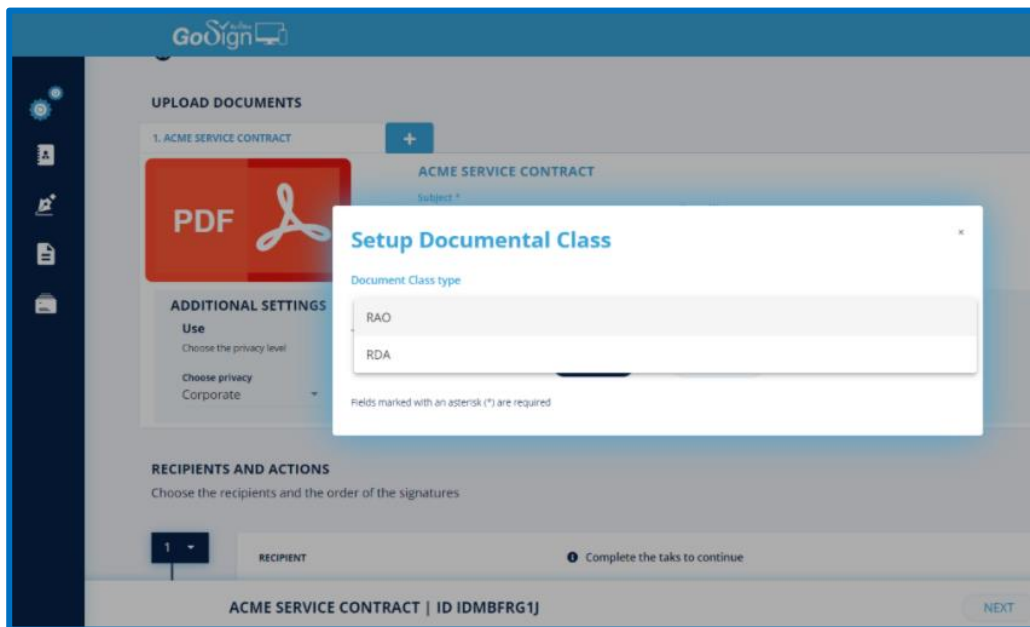
To add further priority to the dossier, you need to activate the Urgent Dossier box.

By clicking on Other settings, you change some parameters:

- **Privacy level:** privacy can be set as CORPORATE (indicates that the file is for internal use); PUBLIC (which can also be viewed outside the company); CONFIDENTIAL; STRICTLY CONFIDENTIAL.
- **Document class** (available only for enterprise users): by clicking on "NONE→ SET DOCUMENT CLASS" the enterprise user can choose the type of document class between Customer Offer, RAO, RDA.

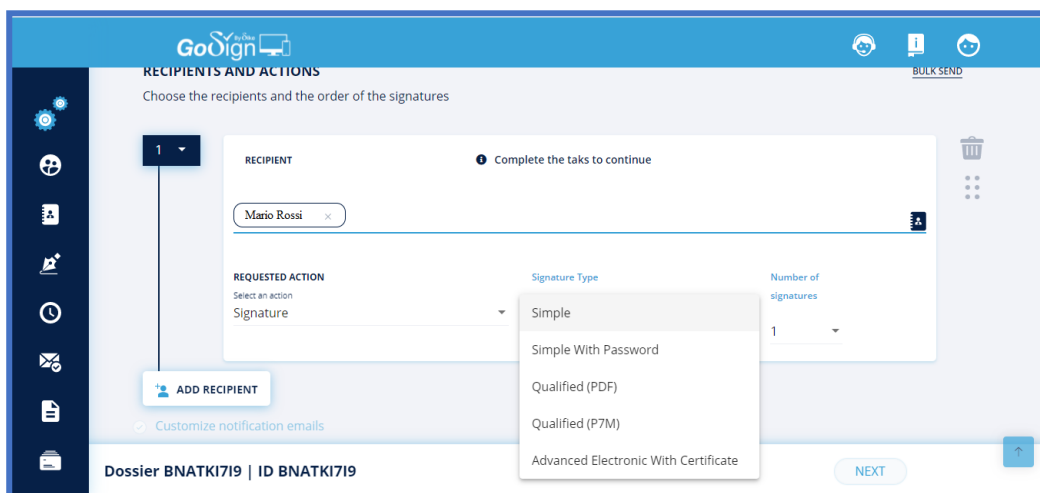
In the last case, the user company can choose the type of document class from: Customer Offer, RAO, RDA.

By clicking on RDA (Purchase Request) → The user must enter some information such as: amount (mandatory), date, order number, name of the supplier.



17.3 RECIPIENT SELECTION

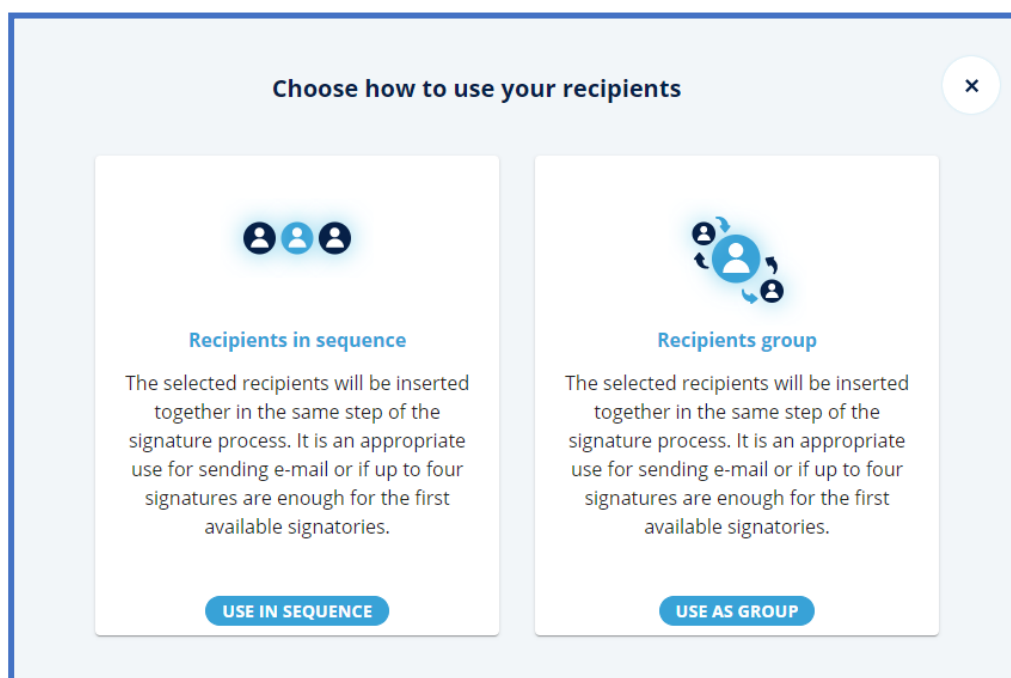
Type the email; within the box. By clicking on the address book, where you can choose the recipients with a click.



The recipient will be specified, by the applicant of the signature, what action he wants to be carried out on the file (in this case a signature), pre-set the type of signature, and the number of signatures he wants to be affixed.

If multiple recipients are selected, you can choose how to use the recipients:

1. *Recipients in sequence* → The selected recipients will be inserted together in the same step of the signature process. It is an appropriate use for sending e-mail or if up to four signatures are enough for the first available signatories.
2. *Recipients Group* → The selected recipients will be inserted together in the same step of the signature process. It is an appropriate use for sending e-mail or if up to four signatures are enough for the first available signatories.



17.4 ADDITIONAL ACTIONS FOR RECIPIENTS

If configured, for each recipient it is also possible to define additional actions, which must be carried out by the signatory to complete the practice. Those actions are:

1. Add permission to associate attachments: this function, allows you to request the signatory to attach documents to the file.
2. Privacy level (available only for enterprise users): a function that allows you to strengthen the security of a document by setting a code to access the file.

By clicking on add recipient, another recipient will be added and you can choose when you will have to apply your signature to the case:

- **Next recipient** → the recipient will receive the file only after the first recipient has signed the document;
- **Recipient in Parallel** → the recipient will receive the file at the same time as the first recipient and it does not matter in which order the signatures are affixed;
- **Previous recipient** → the recipient will receive the file only before the previously configured recipient;
- With *Customize notification e-mail*, you can customize the text of the notification e-mail that recipients will receive.

Customize notification emails

Subject
Dossier TS8R6Z680

Message (To all recipients)
Mario Rossi sent you a new dossier that requires your attention

Do you want to send a different message to one or more recipients?
WRITE YOUR MESSAGE ▾

CANCEL CONFIRM

- **Add recipients in copy:** gives the possibility to the chosen recipients to receive a copy of the e-mail without the obligation to sign the document.

✓ Add recipients in copy

18 PLACE SIGNATURES

It is possible, by clicking on the recipients, to place the signatures to be requested.

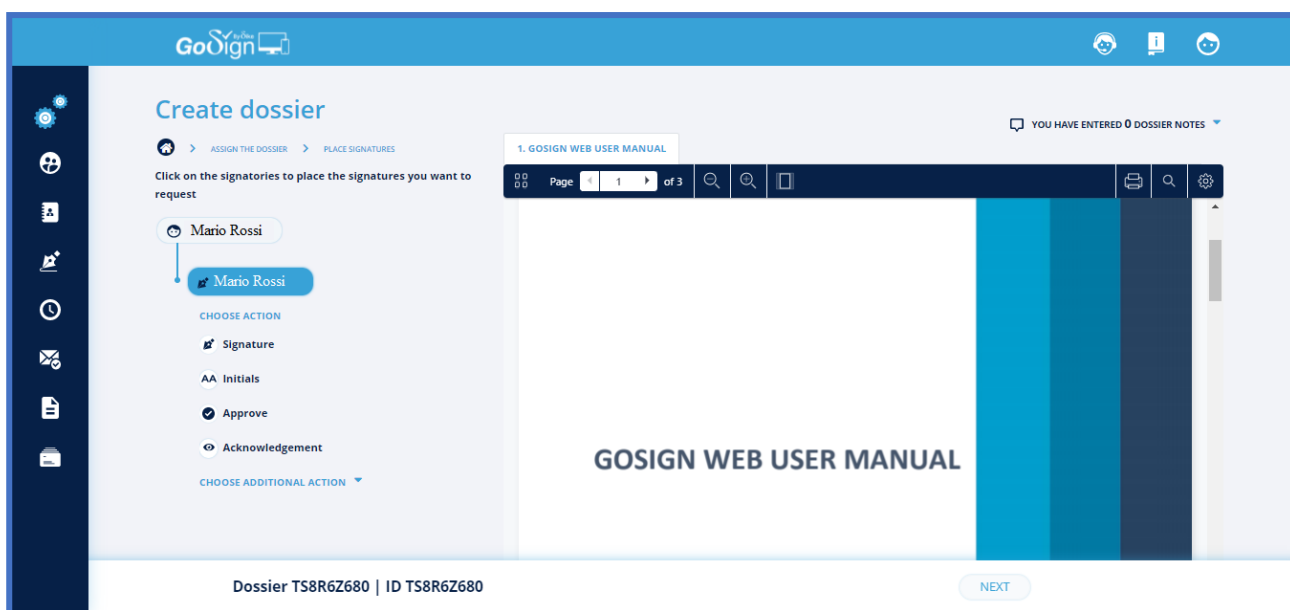
18.1 DOCUMENT PREVIEW

On the right side of the screen, there is a preview of the document.



It is possible to change the display mode by clicking on the first icon on the left; zoom on the document; print the document; search within the document.

If there are several documents, to switch from one document to another, click on the tab that contains the name of the document you want to see.



18.2 CHOOSE ACTION

On the left of the document preview, placing the icon on the document preview itself, you can choose between those actions:

- **Signature:** by clicking on the document preview, you can decide where to place the signatures and to set whether or not you want to make the signature visible. Using the Reason field, the reason for the signature will be set.
- **Initials:** clicking on the document preview and placing the icon, it will be possible to set if you want to make the initials visible on the document or not;
- **Approve:** This icon allows you to indicate that the document has been approved by the recipient of the document;
- **Acknowledgment:** this icon allows you to indicate that the document has been viewed by the recipient of the document.

CHOOSE ACTION


 **Signature**

☒ visible on PDF

Reason

 **Initials**

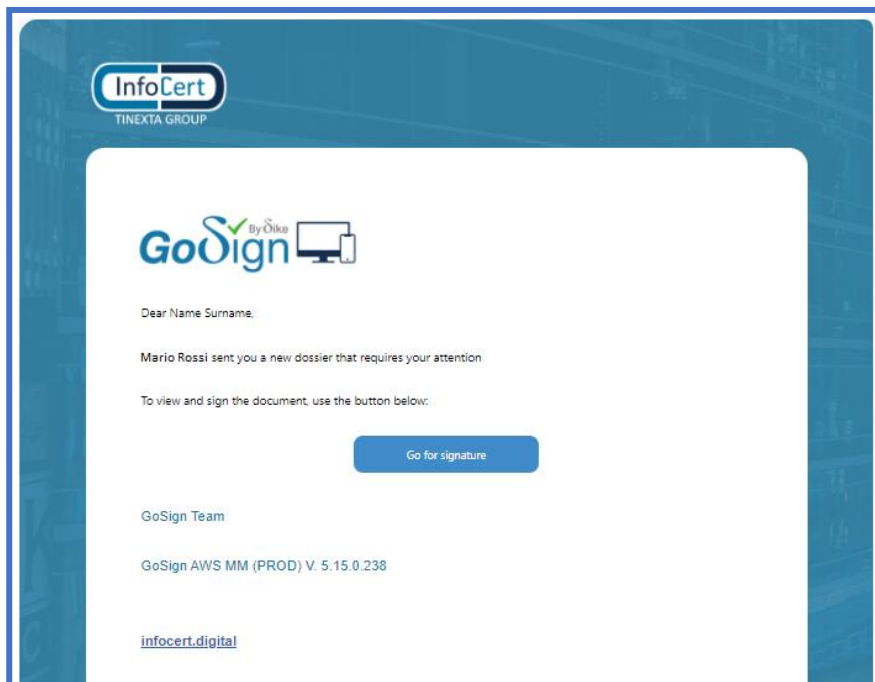
 **Approve**

 **Acknowledgement**

CHOOSE ADDITIONAL ACTION ▼

18.3 ADDITIONAL ACTION

It is possible, to add notes; to add a note you need to click on YOU HAVE ENTERED 0 DOSSIER NOTES. Once all the procedures have been completed, by pressing on NEXT, it will be sent an email to the recipients with the invitation to sign the practice.



When you use the link contained in the email, you will receive a request to authenticate yourself via an OTP which will be sent via SMS to the telephone number indicated in your personal data. Only by entering the correct OTP will you be able to access the file and take the requested action.

Until one of these options is carried out, the dossier will be counted among the dossiers PENDING; once it has been signed, the dossier is considered COMPLETED.

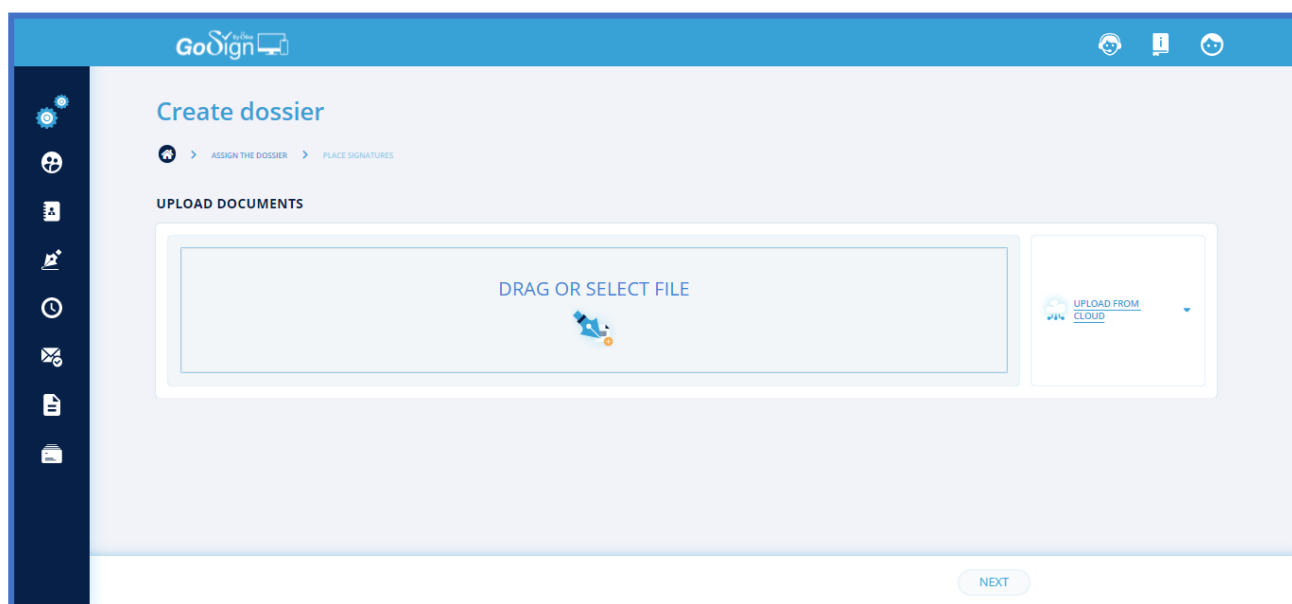


19 CLOUD STORAGE CONFIGURATION (ONEDRIVE - GOOGLE DRIVE)

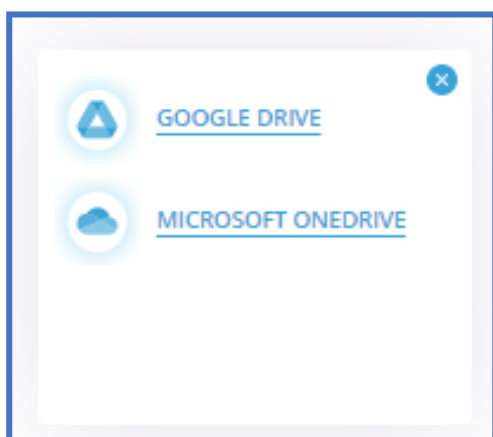
The cloud storage function allows you to upload documents from Google Drive or Microsoft OneDrive.

19.1 UPLOAD DOCUMENTS

To upload one or more documents you need to click on Request signature and then “Upload from cloud”.



By clicking on the "Upload from the cloud" link you can select Google Drive or Microsoft OneDrive.



By selecting one of the two items in the list, it will be shown an authentication page where you will need to enter the credentials (email and password) of the account you want to configure (see paragraphs: How to set up Microsoft OneDrive account and How to set up Google Drive account).

After this phase, the list of documents on the selected cloud storage service is available.

Select the documents and click on "select" to attach them to the file.

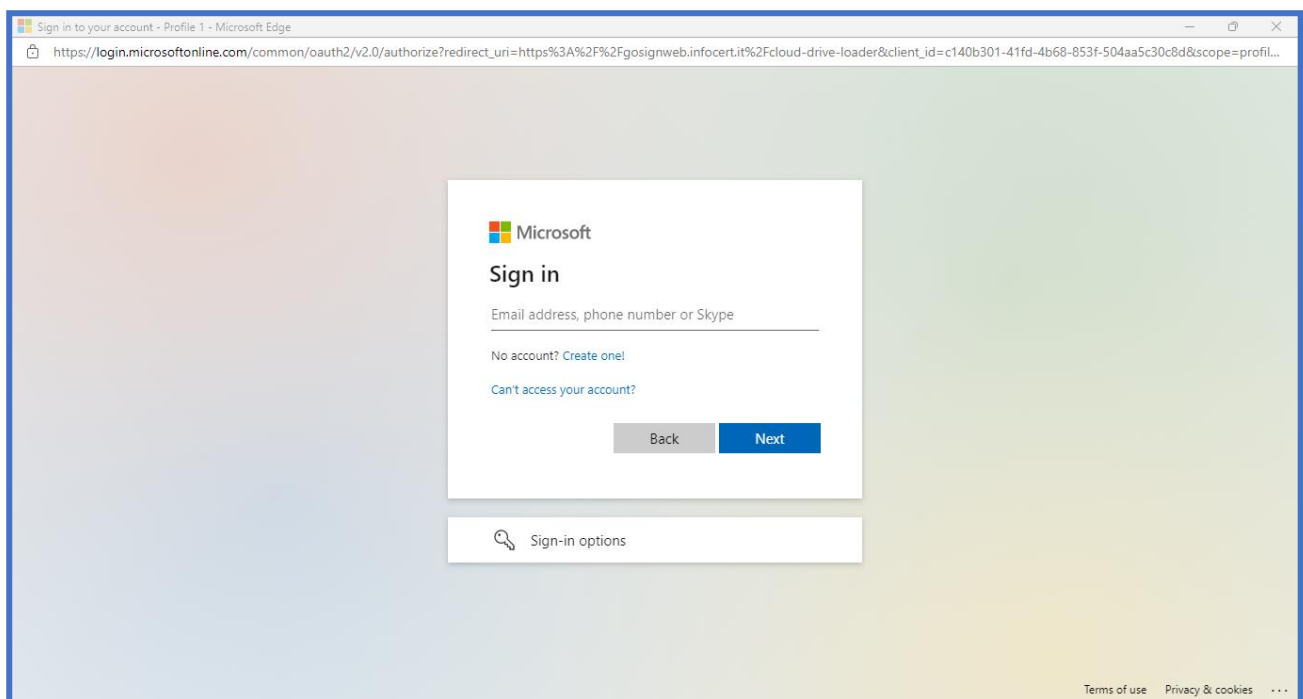
At the end of the upload, the documents have been attached to the file.

Uploading of documents via Cloud Storage is the same for **“Sign and Send”** and **“Signature at the counter”**.

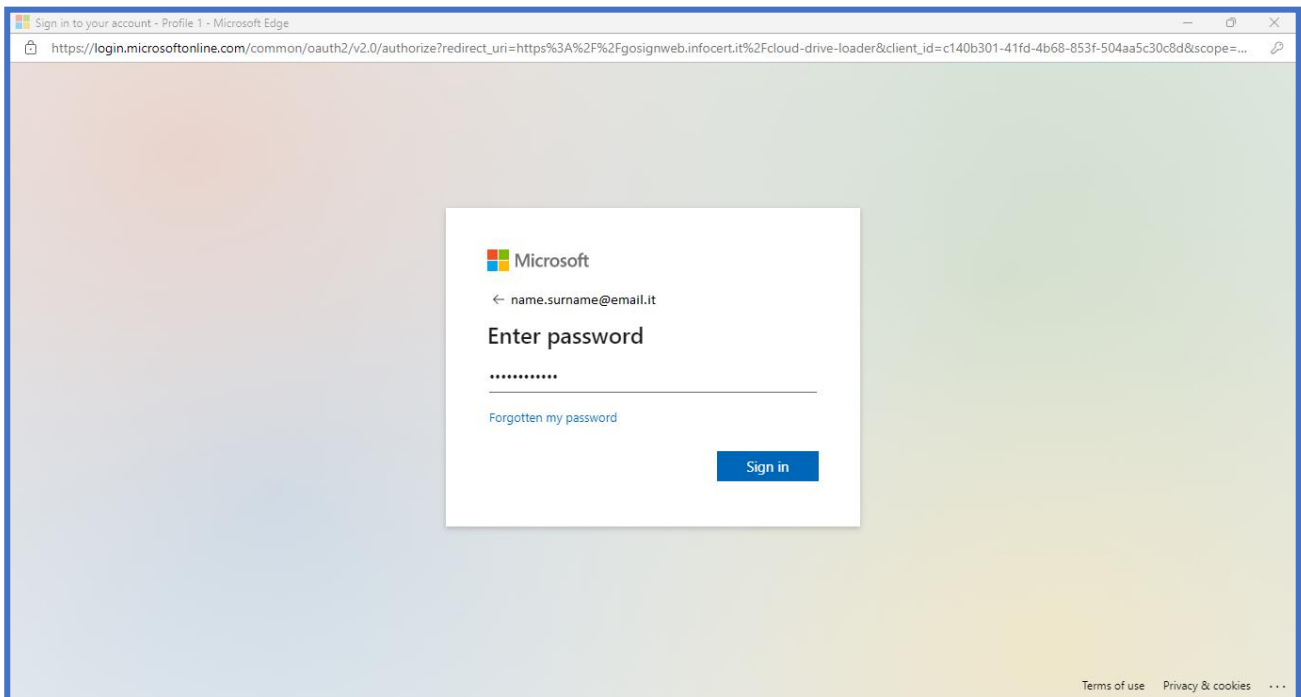
19.2 HOW TO SET UP A MICROSOFT ONEDRIVE ACCOUNT

To set up a Microsoft OneDrive account, after clicking on the link indicating "Microsoft one Drive", the service login screen will be displayed.

Enter the email of the account you want to configure and click "Next".



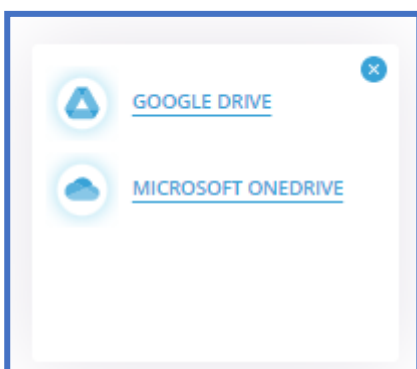
Then, enter the account password and click on "Sign in".



The account is correctly configured and from now on the user can sign their documents by importing them directly from Microsoft OneDrive.

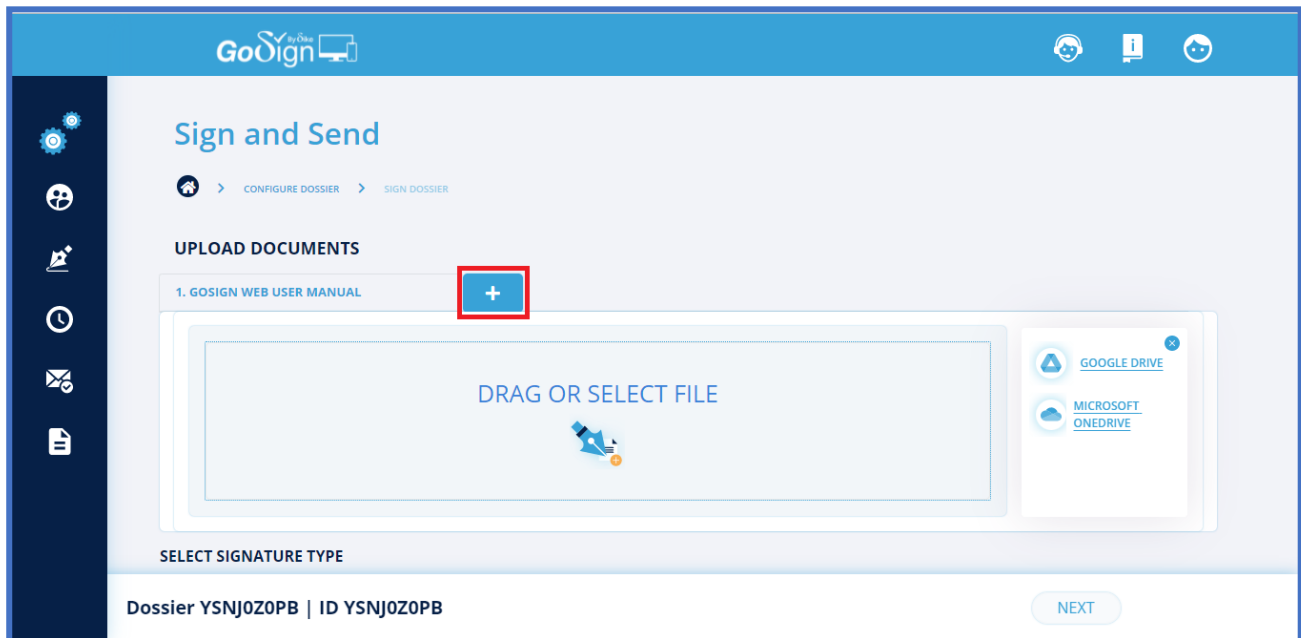
19.3 HOW TO SET UP A GOOGLE DRIVE ACCOUNT

To set up a Microsoft OneDrive account, after clicking on the link indicating "Google Drive", a screen will appear in which you must enter the email, then the password; at the end, your account will be correctly configured and you will be able to upload documents directly from Google Drive.



19.4 ADD DOCUMENTS FROM CLOUD STORAGE TO THOSE ALREADY PRESENT ON THE DOSSIER

It is possible to select documents from the cloud, even after starting the dossier process, by clicking on the "+" button.



You will need to click on the "Upload from the cloud" link, select Google Drive or Microsoft OneDrive.

Then it will be possible to choose the documents of interest and click on "select" to attach them to the file.

At the end of the document upload operation, the cloud service closes and the documents are attached to the file.

It is possible to continue creating and sending it after completing the process and inserting the necessary requested actions.

You can also apply this procedure in the case of "Signature and Send" and "Signature at the counter".

20 ADD PERMISSION TO ASSOCIATE ATTACHMENTS

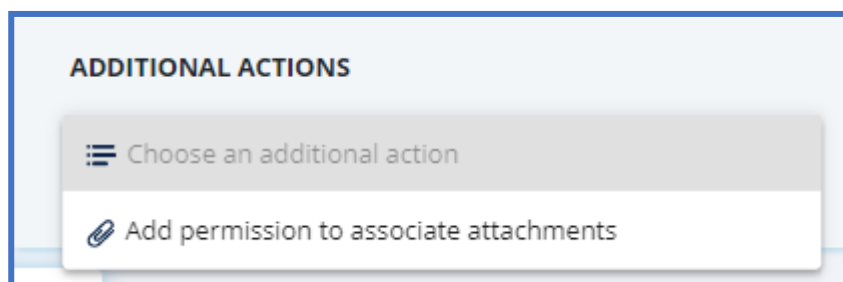
The function allows you to add attachments of any kind to a file to be processed, which can be mandatory or optional and is available only in the Request signature mode.

20.1 DEFINITION OF THE DOSSIER

The "Add permission to associate attachments" feature provides the ability for a user to indicate which documents he wishes to be uploaded and which to make mandatory.

The request to upload one or more attachments is addressed to the assignee of the signature task who must work on the file at the same time.

During the creation of the dossier, after having correctly indicated the recipient, the requested action, and the type of signature, the "Additional actions" will be enabled:



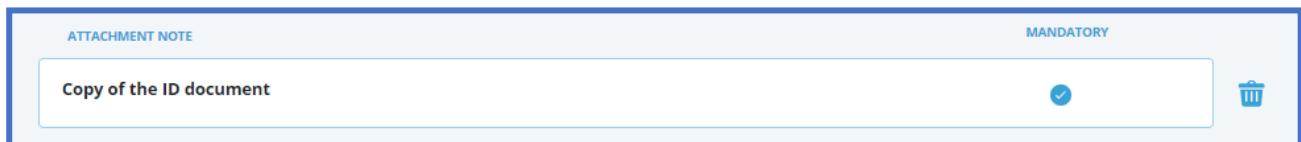
By clicking on "Add permission to associate attachments" it will be open a window that will allow the user who creates the file to:

1. Add a descriptive note to the attachment (for example, a copy of the identity document or a copy of the tax code),
2. Enable/disable, for each attachment, its mandatory nature (YES / NO) by clicking on the "Mandatory Attachment" flag.

To confirm the operation, click on "Add"; to cancel click on "Cancel".

20.2 EDITING OF THE ATTACHMENTS OF AN ONGOING CASE

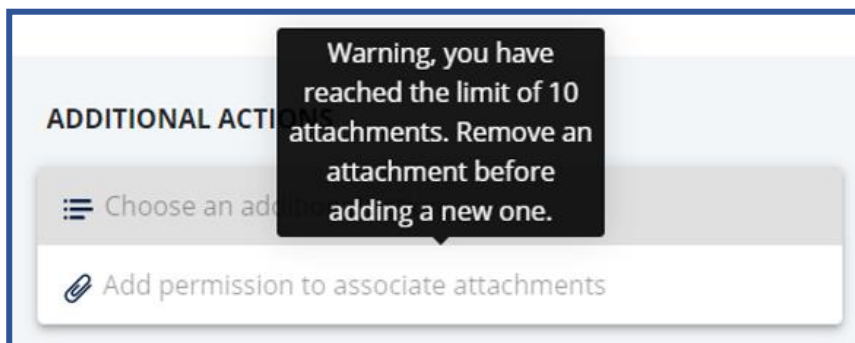
After confirming the attachment settings, the user has the option to delete the attachments by clicking on the trash icon next to each attachment:



Attachment settings can only be changed on dossiers that have not yet been worked on or are in progress.

20.3 NUMBER OF ATTACHMENTS AND MAXIMUM SIZE

Once the maximum limit of possible attachments per single file has been exceeded (regardless of whether they are mandatory or not), the user will see the message:

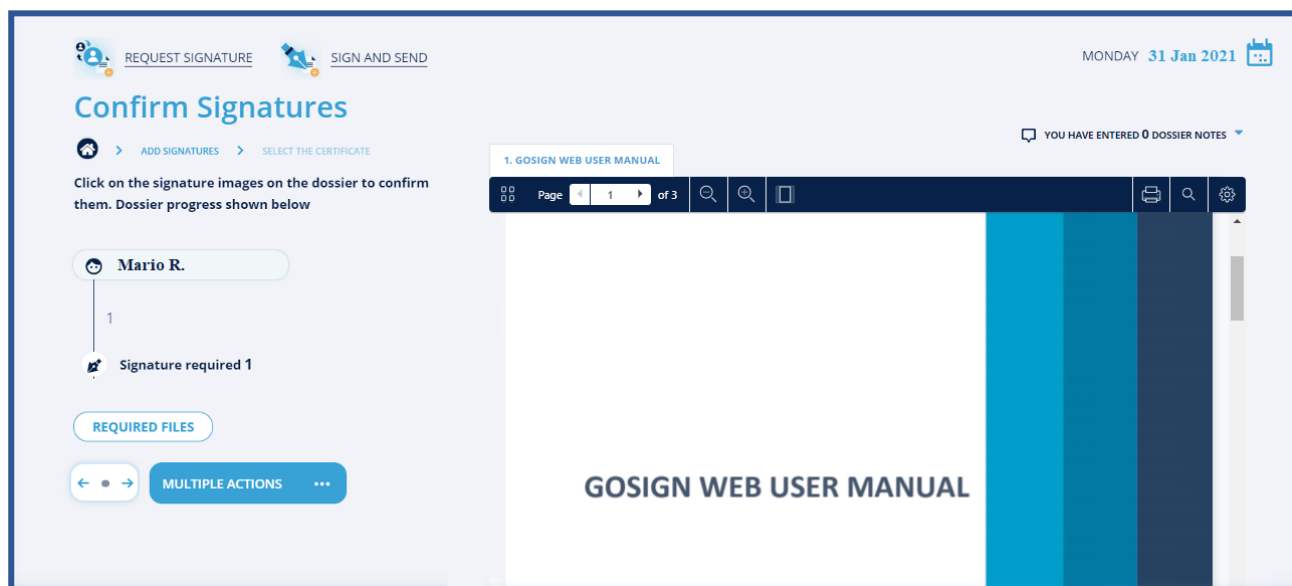


The “Add permission to associate attachments” link will no longer be clickable.

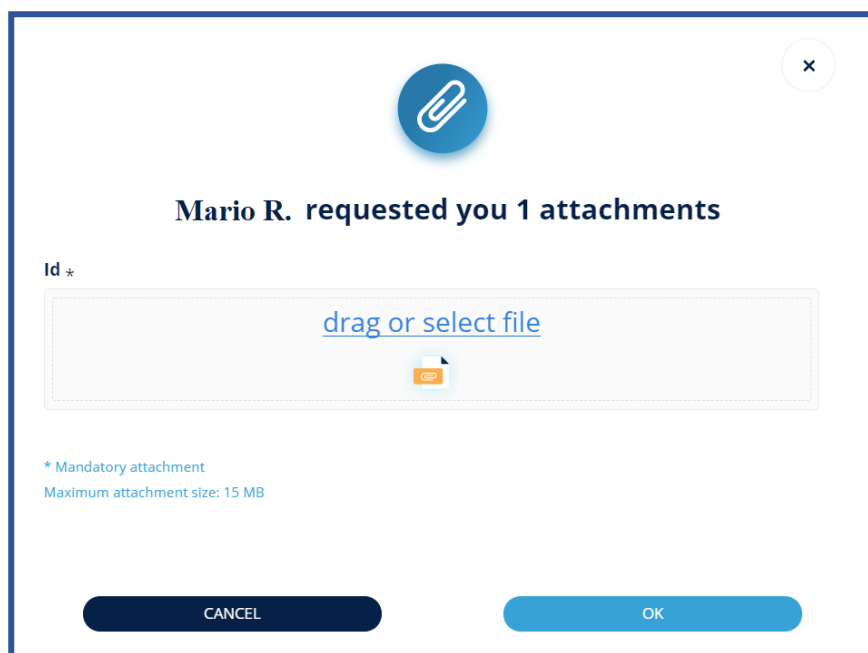
There is also a limitation on the maximum size of the single file.

20.4 SIGN THE DOSSIER FROM GOSIGN WEB APPLICATION

The user who is requested to upload the attached files will have to click on "REQUIRED FILES":

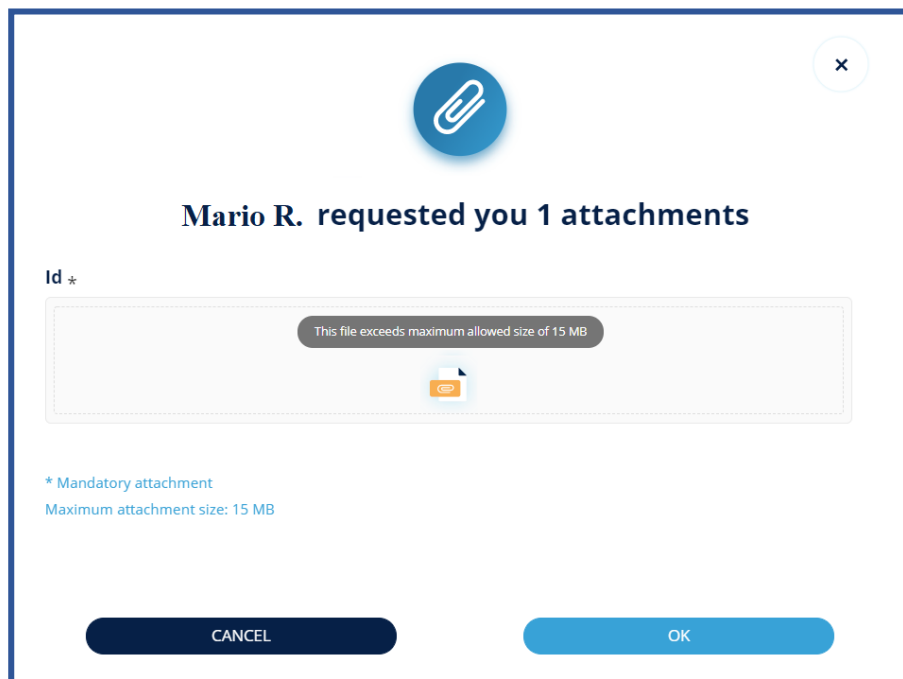


By clicking on this link, you will see the modal that allows the upload of documents:



Here, you can see the description for each required attachment and whether it is mandatory or not (indicated with the symbol *).



After uploading the attachments, you will be able to see that the file is oversized.



After uploading the attachments, you will be able to:

1. Delete the attachment by clicking on the "Delete" button (trash can icon), placed next to each attachment;
2. Cancel the file upload operation by clicking on "Cancel";
3. Confirm the attached documents by clicking on "OK".

Once the attachments have been uploaded, click on "SIGN" to proceed with signing the file.




Confirm Signatures


Dear **Roberto**, **Mario R.** asks you to approve the REJNRSGO file with Gosign with the subject "Evidence".
Browse the documents below and click on all the signature images you find on the file to approve them.
You will then need to use the required digital signature to complete the application. At the end of the signing process, when all recipients have completed their signatures, you will receive an email with the signed documents.


Click on the signature images on the file to confirm them.
Below you will find the progress of the practice

YOU HAVE ENTERED 0 PRACTICE NOTES



 Mario R.

Sample

 Signature required 1

 Initial request 2




REQUIRED FILES: INSERTED


 


CONFIRM EVERYONE

1. GOSIGN BUSINESS MOBILE

Page 1 of 3

 Roberto




Evidence | ID 123456 | Standard

REFUSE

COMPANY

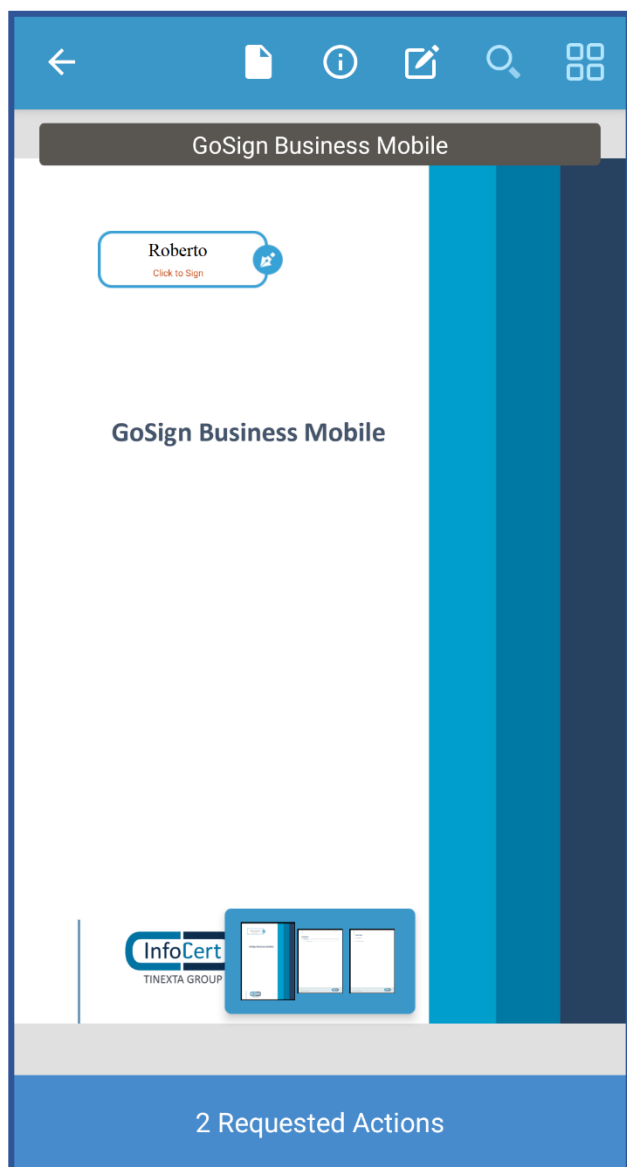
⚠ Attention: The "SIGNATURE" button of the practice is enabled only when the documents requested as MANDATORY are loaded.

InfoCert S.p.A. – all rights reserved

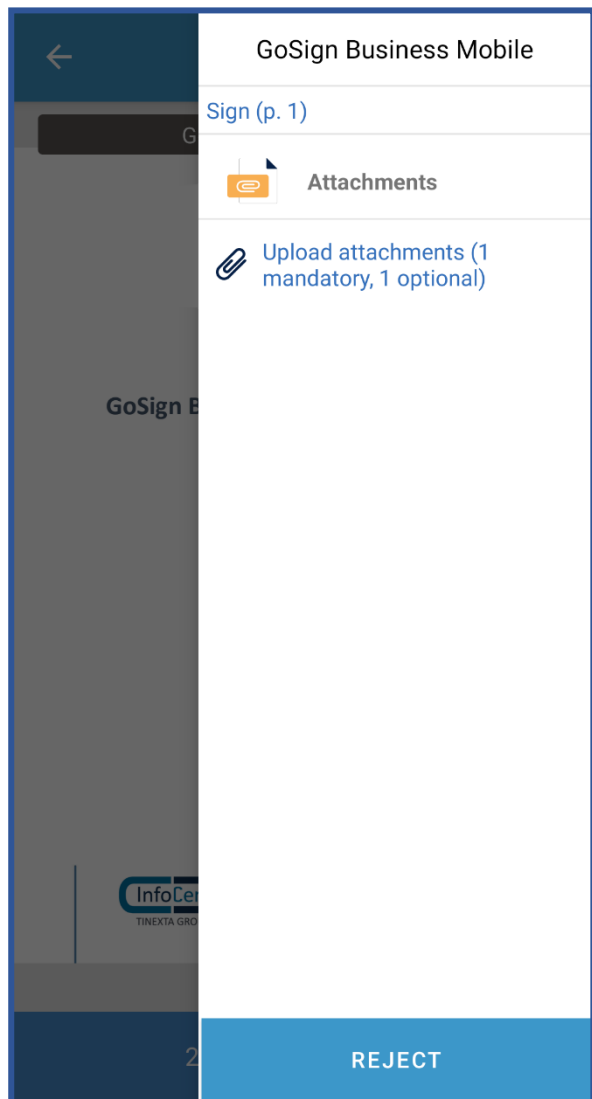

TINEXTA GROUP

20.5 SIGNING OF THE DOSSIER FROM THE GS BUSINESS MOBILE APPLICATION

The user who uses the GoSign Business App from mobile displays the list of dossier and clicks on the one of interest.



Click on "Actions" (below), and display the screen.



By clicking on "Upload attachments", the screen is displayed.

← Attachments

Mario R. has requested 2 attachments from you

MANDATORY ATTACHMENTS

Attachment 1

UPLOAD

OPTIONAL ATTACHMENTS

Attachment 2

UPLOAD

Upload the attachments by clicking on "Upload", located next to each required attachment.

← Attachments

Mario R. has requested 2 attachments from you

MANDATORY ATTACHMENTS

Attachment 1 **UPLOAD**

OPTIONAL ATTACHMENTS

Attachment 2 **UPLOAD**

Next to each uploaded attachment there is the "Delete" button which gives the possibility to delete the attachment.

Click on "Back", you can complete the processing of the practice as usual.

20.6 CONDITIONS AND LIMITS

The function is only available in the REQUEST SIGNATURE mode. It is therefore not available in the SIGN AND SEND and in the modality IN PRESENCE SIGNATURE.

It is possible to request the insertion of attachments only in correspondence with SIGNATURE type tasks, therefore those of SEND EMAIL, PROTOCOLATION, AUTOMATIC SIGNATURE and SIGNATURE OR MODIFICATION are excluded.

You can request up to a maximum of 10 attachments, between mandatory and not, each of which can weigh up to 5 megabytes.

! ATTENTION: In order to proceed with the signing of the dossier, it is necessary to upload the required documents in the "Mandatory Attachments" section.

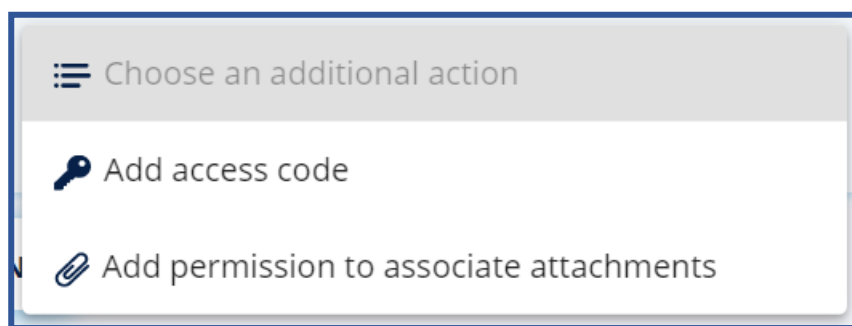
21 ACCESS CODE: DEFINITION OF ACCESS CODES TO THE PRACTICE

The Access Code feature, available only for enterprise users, allows you to have an additional level of authorization when accessing the file at the time of signing.

It necessarily requires that the signatory, before accessing the case, enters the code.

21.1 DEFINITION

During the creation of the dossier, after having correctly filled in the task with the recipient, requested action, and type of signature, the "Additional actions" will be enabled:



By clicking on "Add access code", the user who creates the dossier, will be enabled to add a type of authorization required from the signatory, before working on the dossier.

There are 3 types of authentication:

1. **PIN**
2. **OTP SMS**
3. **OTP EMAIL**

ATTENTION:

1. Configuring an Access Code is only available for tasks involving only one signer;
2. For each task it is possible to configure only one authorization level.

1

RECIPIENT

Mario R. x

REQUESTED ACTION
Select an action
Signature

Signature Type
Qualified (PDF)

Number of signatures
1

Apply to all recipients

ADDITIONAL ACTIONS

Choose an additional action

Only one access code can be entered

ADD ACCESS CODE

ADD PERMISSION TO ASSOCIATE ATTACHMENTS

PIN: 123456

EDIT

DELETE

Customize notification emails

Add recipients in copy

21.2 PIN

By selecting "PIN", you will be prompted to set a 6-digit numeric code. This code will not be automatically sent by GoSign to the signer and will therefore be borne by the user who creates the file.

Select the Access Code method ⓘ

Type
PIN

PIN
123456

CONFIRM

CANCEL

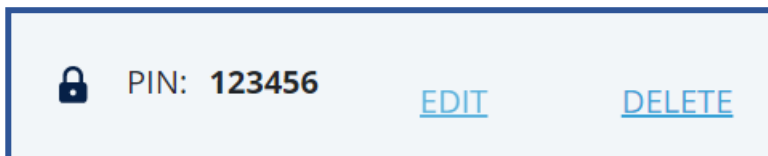
By clicking on "DELETE", the authentication level is deleted.

By clicking on the appropriate "EDIT" link you can change:

1. PIN, setting a different one
2. TYPE of authentication

To save the changes made, click on the "CONFIRM" button.

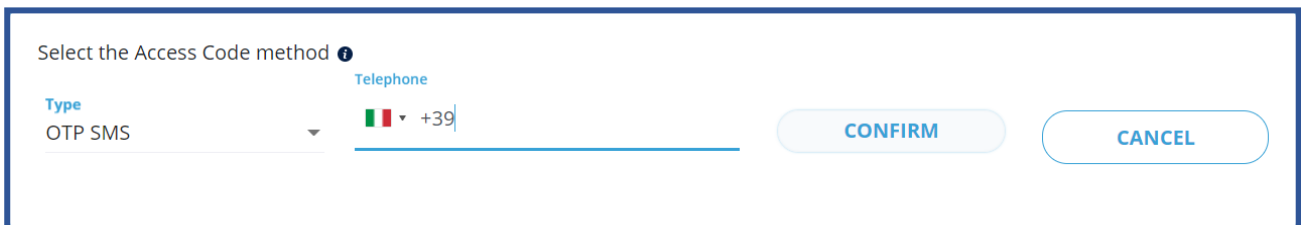
To cancel the changes you need to click on the "CANCEL" button.



A light blue rectangular box with a dark blue border. Inside, on the left, is a black padlock icon followed by the text "PIN: 123456". To the right of this text are two blue, underlined links: "EDIT" and "DELETE".

21.3 OTP SMS

By selecting "OTP SMS", you will be asked to set the mobile number to which to send the OTP (if it is not possible to retrieve it automatically from the signer's master data):



A light blue rectangular box with a dark blue border. At the top left, it says "Select the Access Code method" with a small information icon. Below this, there's a "Telephone" label. On the left, there's a dropdown menu with "Type" above it and "OTP SMS" selected. To the right of the dropdown is a telephone icon, a country code dropdown showing the Italian flag and "+39", and a text input field. To the right of the input field are two buttons: "CONFIRM" and "CANCEL".

By clicking on "DELETE", the authentication level will be deleted.

By clicking on "EDIT", you can change:

1. The email, by entering a different one;
2. The TYPE of authentication

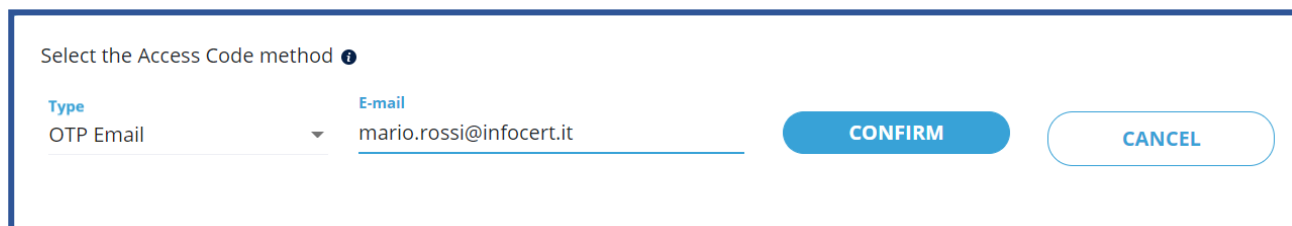
To save the changes made, click on the "CONFIRM" button.

To cancel the changes you need to click on the "CANCEL" button.

21.4 DEFINITION OF THE PRACTICE WITH OTP EMAIL

By selecting "OTP EMAIL", the email to send the OTP code will be **automatically** selected, the email corresponds to that of the **assignee of the task**.

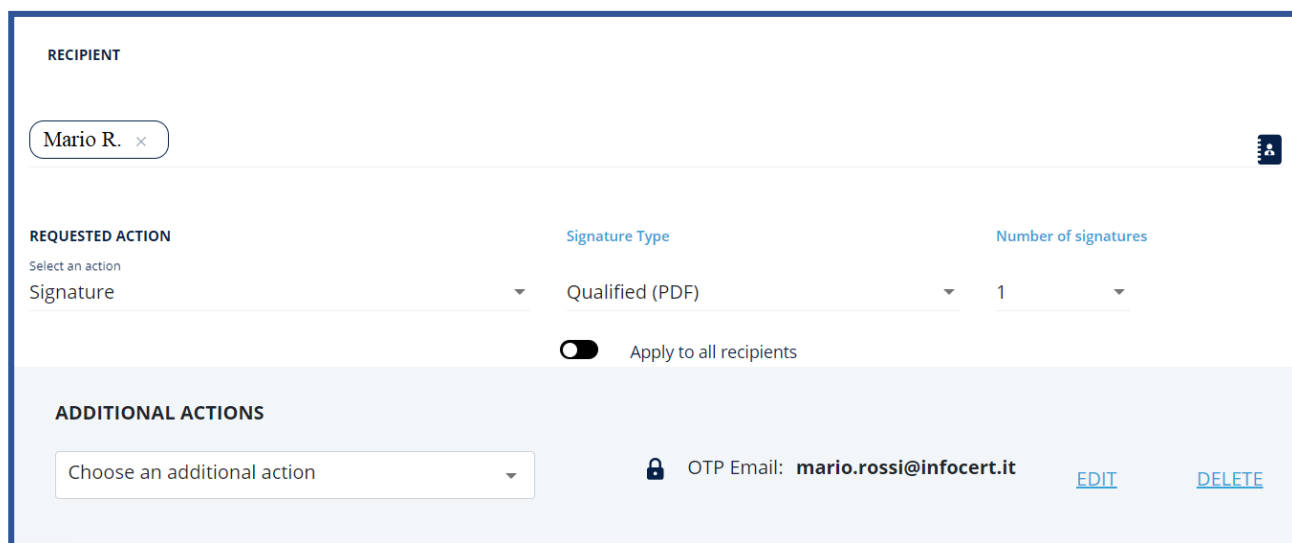
You can change the email address by clicking on the email field and entering a different one.



Select the Access Code method ⓘ

Type	E-mail		
OTP Email	mario.rossi@infocert.it	CONFIRM	CANCEL

Click on confirm, the task will be correctly configured and therefore visible:



RECIPIENT

Mario R. ×

REQUESTED ACTION

Select an action

Signature

Signature Type

Qualified (PDF)

Number of signatures

1

Apply to all recipients

ADDITIONAL ACTIONS

Choose an additional action

OTP Email: mario.rossi@infocert.it

EDIT DELETE

By clicking on "DELETE", the authentication level is deleted.

By clicking on the appropriate "EDIT" link you can change:

1. The email, by entering a different one
2. the TYPE of authentication

To save the changes made, click on the "CONFIRM" button.

To cancel the changes, click on the "CANCEL" button.

ADDITIONAL ACTIONS

Add access code

OTP Email: **mariorossi@infocert.it**
[EDIT](#)
[DELETE](#)

Select the Access Code method ⓘ

Type

OTP Email

E-mail

mariorossi@infocert.it

CONFIRM

CANCEL

21.5 SIGNING OF THE DOSSIER FROM THE GO SIGN WEB APPLICATION

In the list of their dossiers, each of them has a "key" icon, which indicates that the specific signatory, to access the documents of the dossier, must enter the data of the authorization level, required by the person who created the dossier.

DOSSIER I2LE909JL

Mario R. → **Maria V.** (maria.verdi@inf...)

In progress Id I2LE909JL 1 doc

created on: 14/02/2022 16:10:41

21.6 SIGN THE DOSSIER WITH PIN

After clicking on the case to open it, it is visible:

Mario R. asked to authorize you via PIN

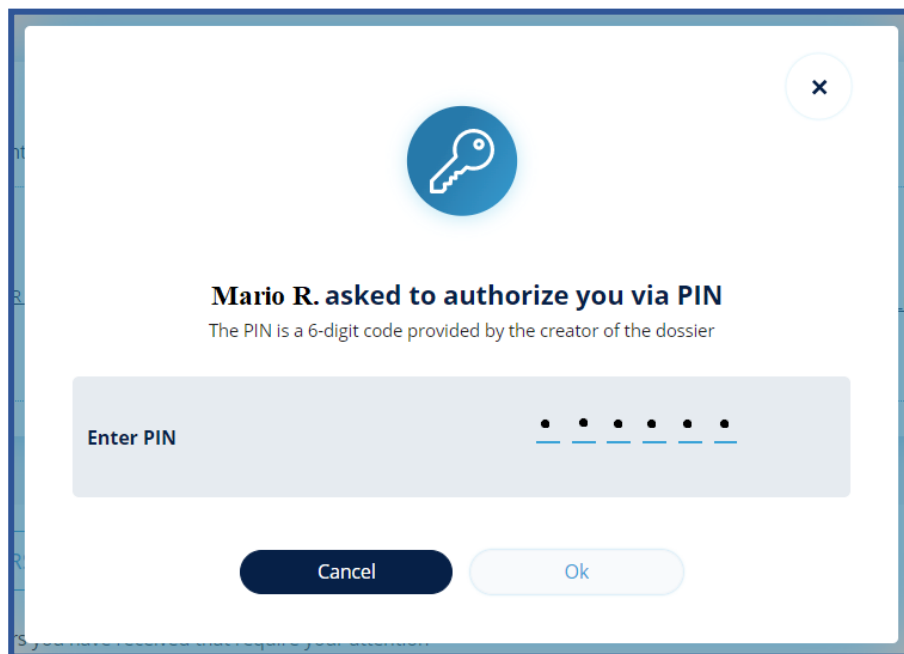
The PIN is a 6-digit code provided by the creator of the dossier

Enter PIN

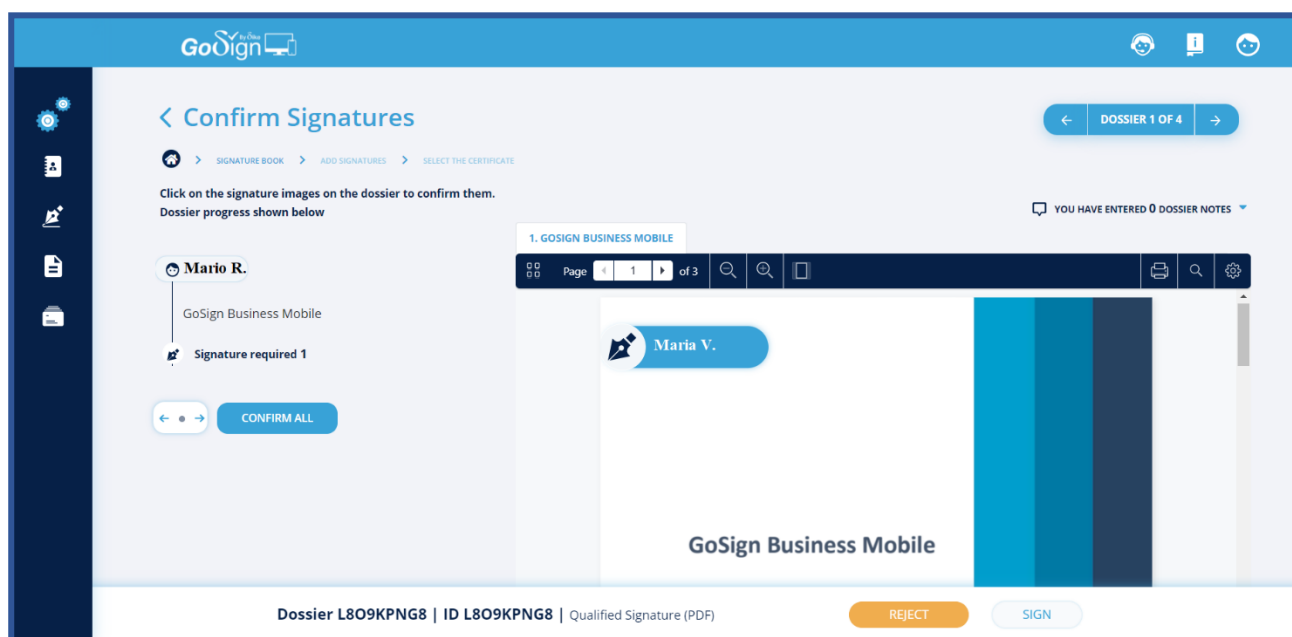
Cancel

Ok

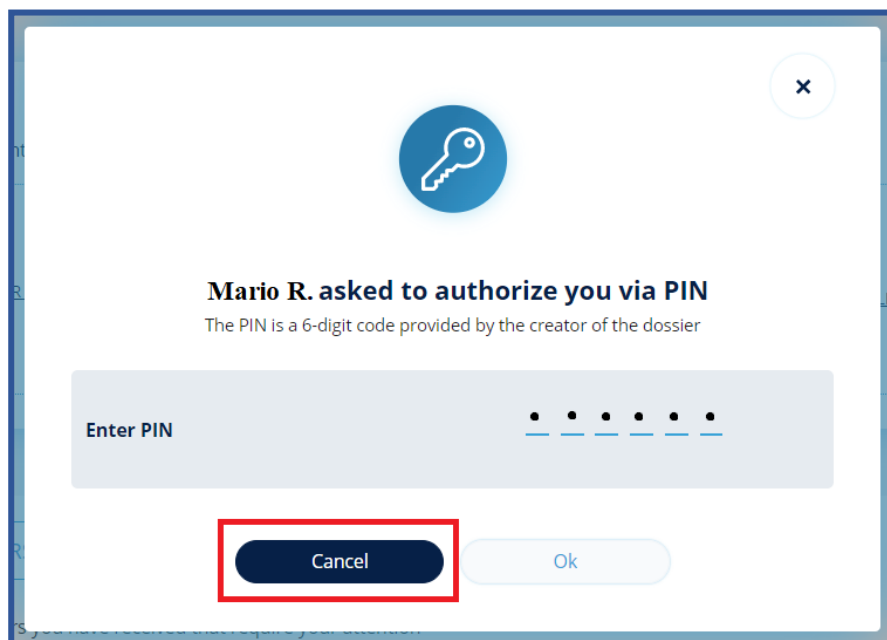
After clicking on the dossier to open it, you can enter the security pin provided by the person who created the case; once inserted, the “OK” button is enabled.



Subsequently, by clicking on “OK”, you will access the documents, where you can proceed in confirming the signature.



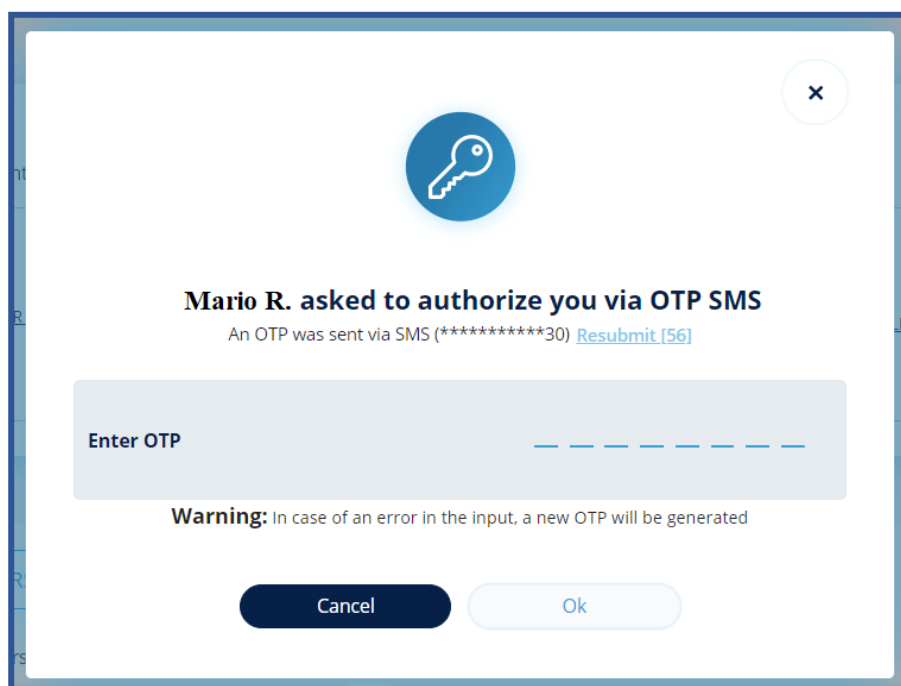
You can cancel the operation at any time by clicking on the "Cancel" button, thus returning to the list of practices.



A screenshot of a dialog box for PIN authorization. At the top center is a blue circular icon containing a white key. Below it, the text reads "Mario R. asked to authorize you via PIN" followed by "The PIN is a 6-digit code provided by the creator of the dossier". In the center is a light gray input field labeled "Enter PIN" with six black dots for the code. At the bottom are two buttons: a dark blue "Cancel" button (highlighted with a red rectangle) and a light blue "Ok" button. A close button (X) is in the top right corner.

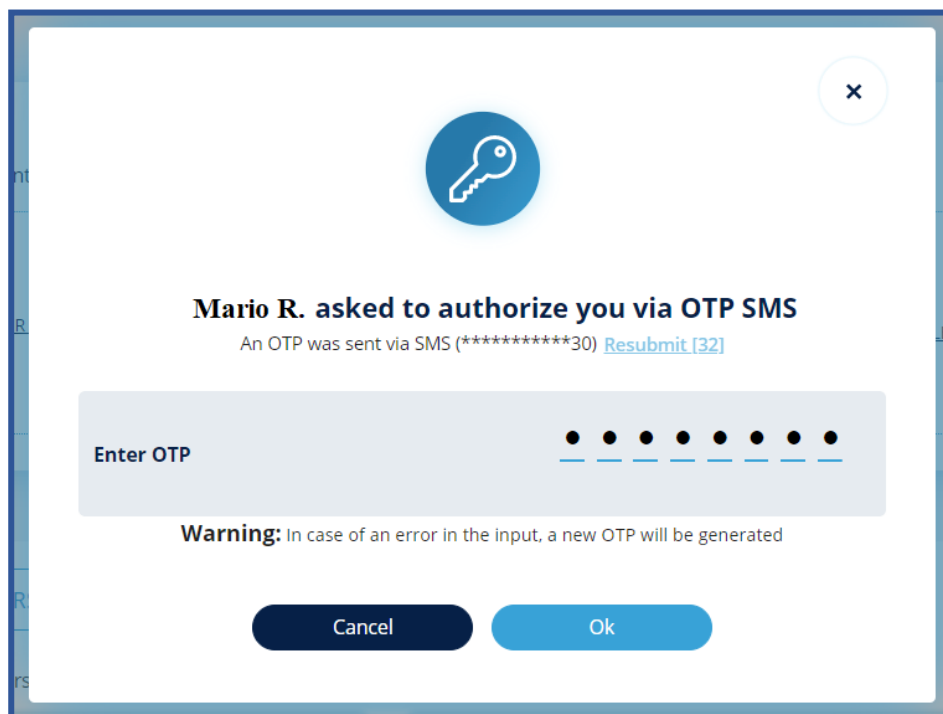
21.7 SIGN THE DOSSIER WITH OTP SMS

After clicking on the case to open it, it is visible:



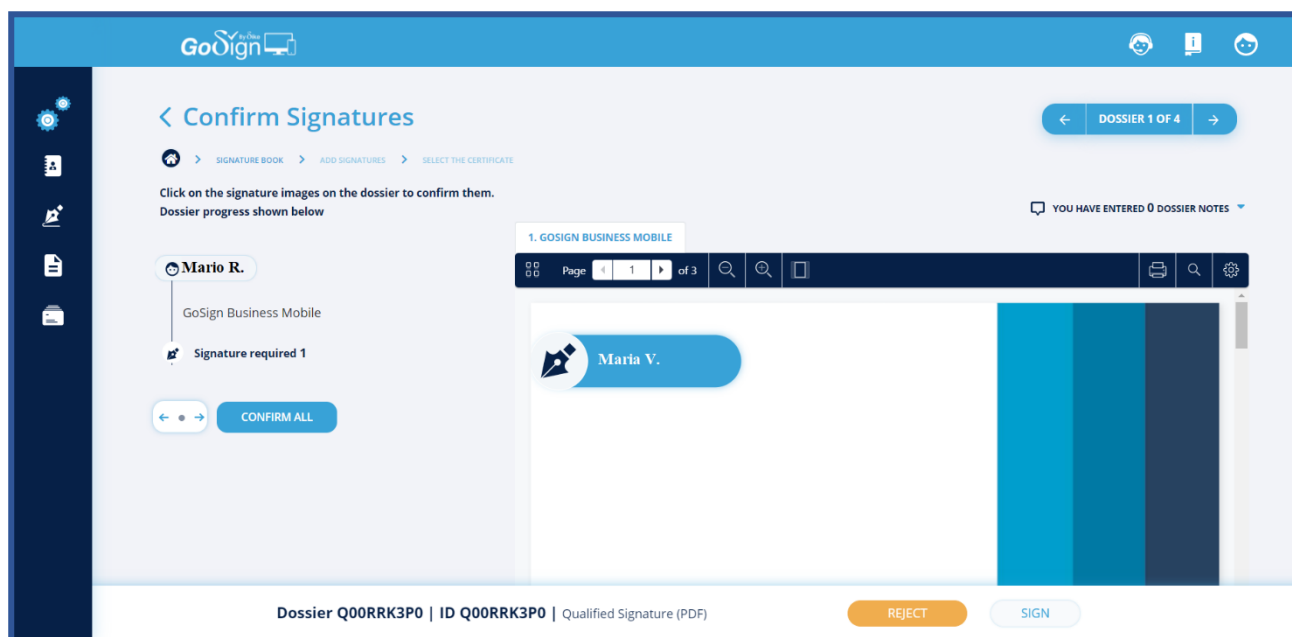
A screenshot of a dialog box for OTP SMS authorization. At the top center is a blue circular icon containing a white key. Below it, the text reads "Mario R. asked to authorize you via OTP SMS" followed by "An OTP was sent via SMS (*****30) [Resubmit \[56\]](#)". In the center is a light gray input field labeled "Enter OTP" with six dashed lines for the code. Below the input field is a "Warning:" message: "In case of an error in the input, a new OTP will be generated". At the bottom are two buttons: a dark blue "Cancel" button and a light blue "Ok" button. A close button (X) is in the top right corner.

By entering the OTP just received via SMS, the "OK" button is enabled.



A modal window for OTP verification. At the top center is a blue circular icon containing a white key. Below it, the text reads: **Mario R. asked to authorize you via OTP SMS**, followed by *An OTP was sent via SMS (*****30) [Resubmit \[32\]](#)*. In the center is a light gray box with the label **Enter OTP** and a series of eight black dots, each with a dashed line underneath for input. Below this box is a **Warning:** *In case of an error in the input, a new OTP will be generated*. At the bottom are two buttons: a dark blue **Cancel** button and a light blue **Ok** button.

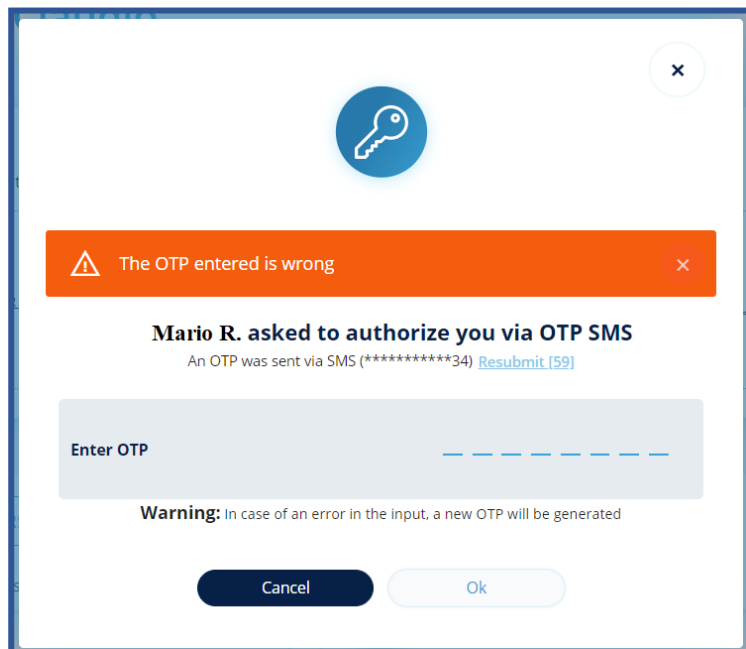
By clicking on "OK" you access the documents of the practice, where you can proceed with the confirmation of the slips and in the signature of the same.



The GoSign web interface for confirming signatures. The header shows the GoSign logo and navigation icons. The main heading is **< Confirm Signatures**. Below it, a breadcrumb trail reads: **SIGNATURE BOOK** > **ADD SIGNATURES** > **SELECT THE CERTIFICATE**. A message states: *Click on the signature images on the dossier to confirm them. Dossier progress shown below*. On the left, a sidebar lists the dossier owner **Mario R.** and the document **GoSign Business Mobile**, with a note **Signature required 1** and a **CONFIRM ALL** button. The main area displays the document **1. GOSIGN BUSINESS MOBILE** on **Page 1 of 3**. It shows a signature by **Maria V.** and a large blue vertical bar. At the bottom, the dossier ID **Q00RRK3P0** and ID **ID Q00RRK3P0** are shown, along with the text **Qualified Signature (PDF)** and **REJECT** and **SIGN** buttons.

If the signer enters an incorrect OTP, a new OTP is automatically sent via SMS.

The screen will display the error message and will be able to enter the new OTP.

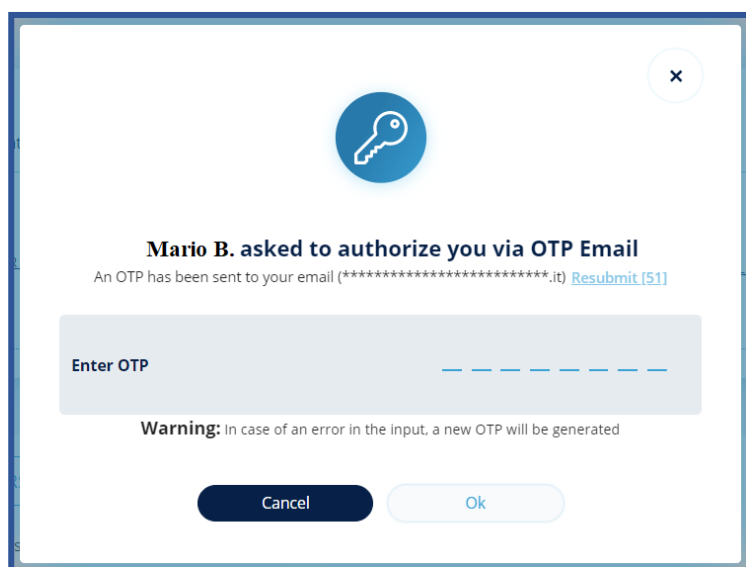


The screenshot shows a mobile application interface for OTP authorization. At the top, there is a blue circular icon with a white key. Below it, an orange error banner displays a warning icon and the text "The OTP entered is wrong". The main heading is "Mario R. asked to authorize you via OTP SMS", followed by the text "An OTP was sent via SMS (*****34) [Resubmit \[59\]](#)". A light blue input field labeled "Enter OTP" contains a dashed line. Below the input field, a warning message states: "Warning: In case of an error in the input, a new OTP will be generated". At the bottom, there are two buttons: "Cancel" and "Ok".

It is possible to cancel the operation at any time by clicking on the "Cancel" button, thus returning to the list of practices list.

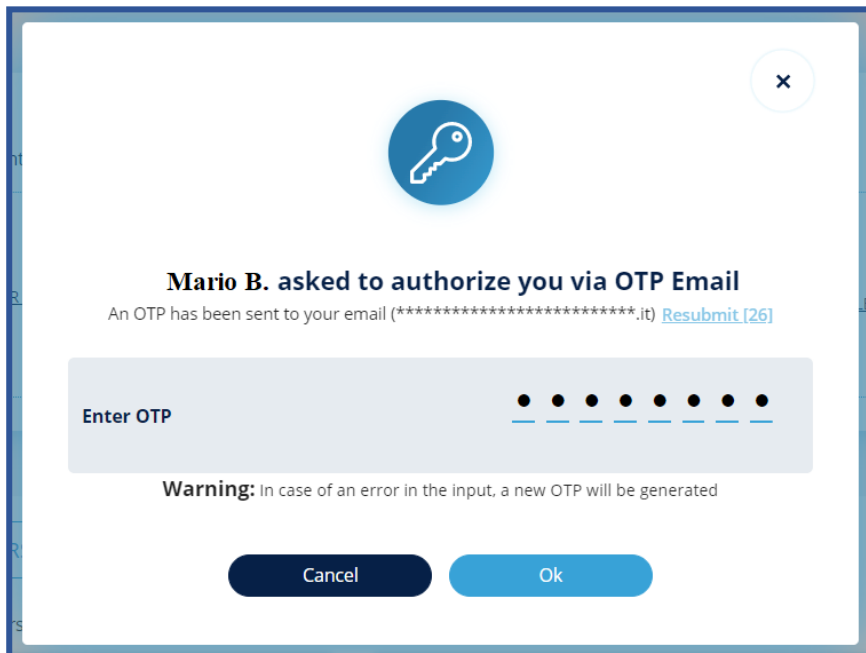
21.8 SIGN THE DOSSIER WITH OTP E-MAIL

After clicking on the file to open it, you can see:



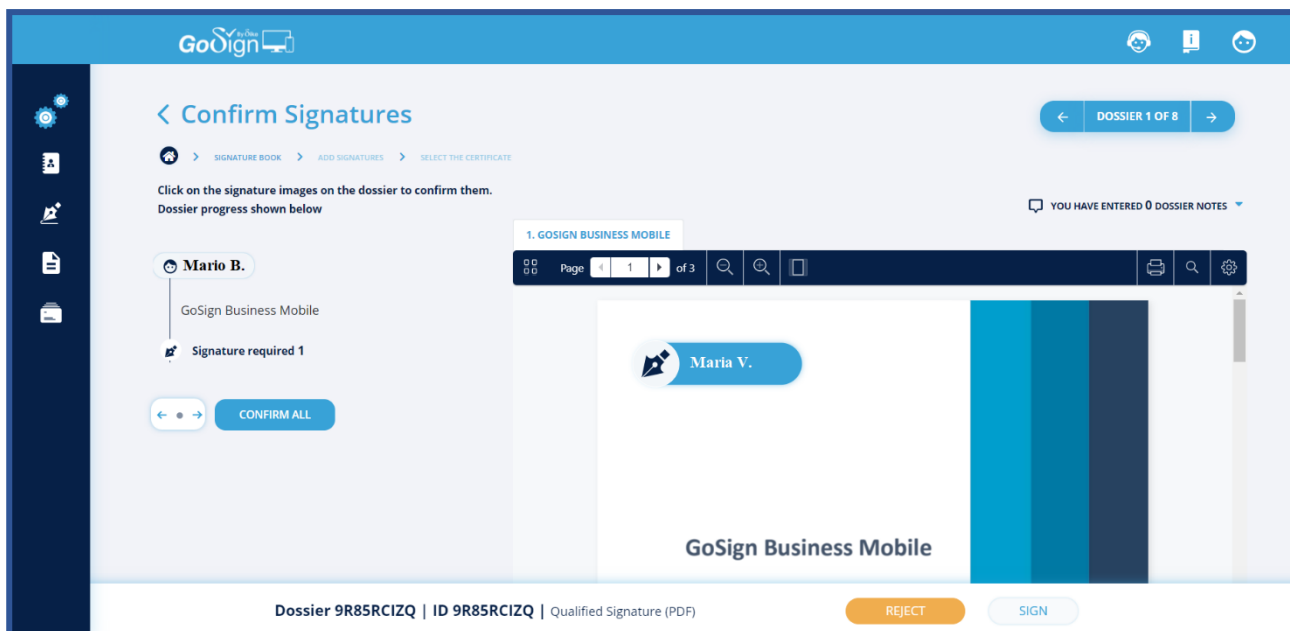
The screenshot shows a mobile application interface for OTP authorization via email. At the top, there is a blue circular icon with a white key. Below it, the heading is "Mario B. asked to authorize you via OTP Email", followed by the text "An OTP has been sent to your email (*****.it) [Resubmit \[51\]](#)". A light blue input field labeled "Enter OTP" contains a dashed line. Below the input field, a warning message states: "Warning: In case of an error in the input, a new OTP will be generated". At the bottom, there are two buttons: "Cancel" and "Ok".

After clicking on the file to open it, you can enter the OTP received via Email; then click on OK.



A modal dialog box for OTP verification. At the top center is a blue circular icon containing a white key. Below it, the text reads: **Mario B. asked to authorize you via OTP Email**. Underneath, it says: "An OTP has been sent to your email (*****.it) [Resubmit \[26\]](#)". In the center is a text input field labeled "Enter OTP" followed by eight dots, each with a dashed line underneath for digit entry. Below the input field is a warning: **Warning:** In case of an error in the input, a new OTP will be generated. At the bottom are two buttons: "Cancel" (dark blue) and "Ok" (light blue).

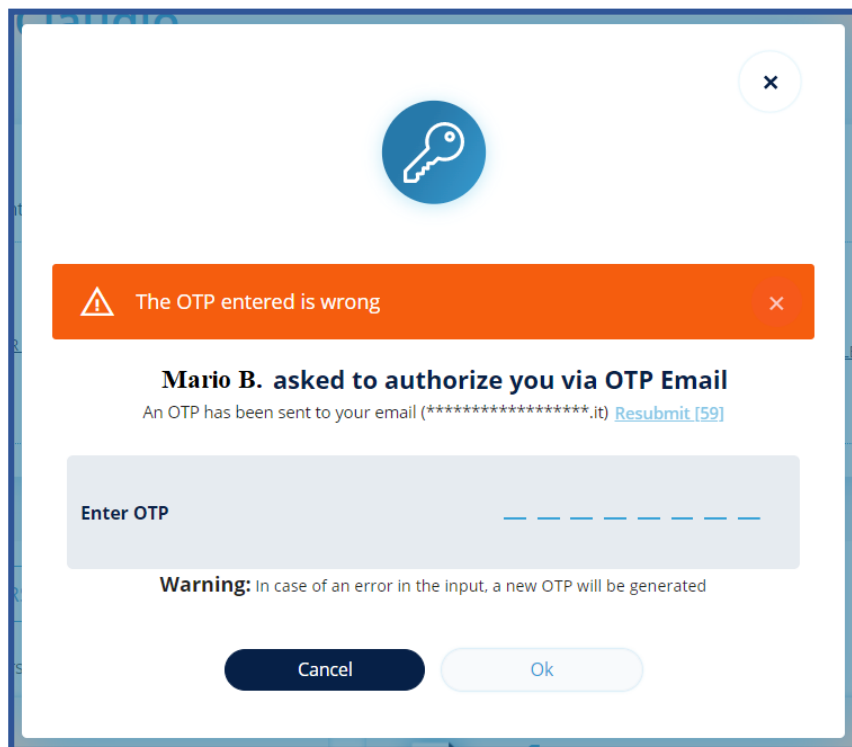
By clicking on “OK”, you will access the documents, where you can proceed in confirming the signature.



The GoSign web interface for confirming signatures. The header shows the GoSign logo and navigation icons. The main heading is "< Confirm Signatures". Below it, a breadcrumb trail reads: SIGNATURE BOOK > ADD SIGNATURES > SELECT THE CERTIFICATE. A message states: "Click on the signature images on the dossier to confirm them. Dossier progress shown below". On the left, a sidebar shows a user profile for "Mario B." with the role "GoSign Business Mobile" and a status "Signature required 1". A "CONFIRM ALL" button is at the bottom of the sidebar. The main area displays a document viewer for "1. GOSIGN BUSINESS MOBILE", showing a page with a signature of "Maria V." and the text "GoSign Business Mobile". At the bottom, the dossier information is shown: "Dossier 9R85RCIZQ | ID 9R85RCIZQ | Qualified Signature (PDF)", with "REJECT" and "SIGN" buttons.

If the signer enters an incorrect OTP, a new OTP is automatically sent via Email.

The screen will display the error message and will be able to enter the new OTP.



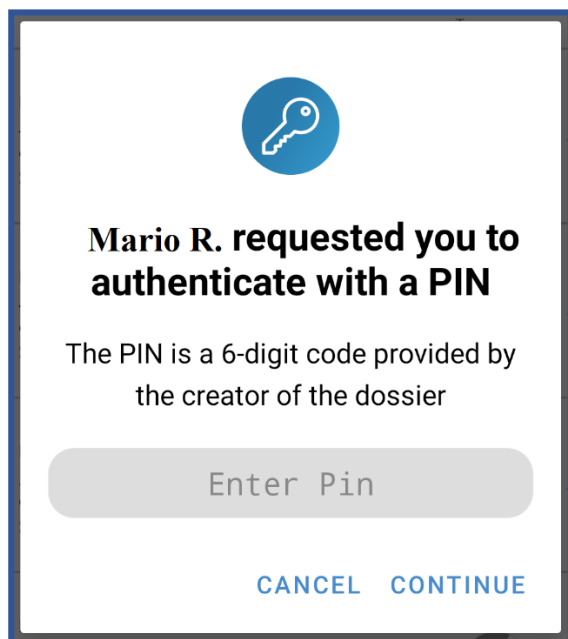
The screenshot shows a modal dialog box for OTP verification. At the top center is a blue circular icon containing a white key. In the top right corner is a close button (X). Below the icon is an orange error banner with a white warning triangle icon on the left, the text "The OTP entered is wrong" in the center, and a close button (X) on the right. Underneath the banner, the text "Mario B. asked to authorize you via OTP Email" is displayed in bold. Below this, a smaller line of text states "An OTP has been sent to your email (*****@*****.it) [Resubmit \[59\]](#)". A light gray input field with the placeholder text "Enter OTP" and a dashed line for the OTP entry is shown. Below the input field, a warning message reads "Warning: In case of an error in the input, a new OTP will be generated". At the bottom of the dialog are two buttons: a dark blue "Cancel" button and a light blue "Ok" button.

It is possible to cancel the operation at any time by clicking on the "Cancel" button, thus returning to the list of practices list.

21.9 SIGNING OF THE DOSSIER WITH PIN FROM THE GO SIGN BUSINESS MOBILE APP

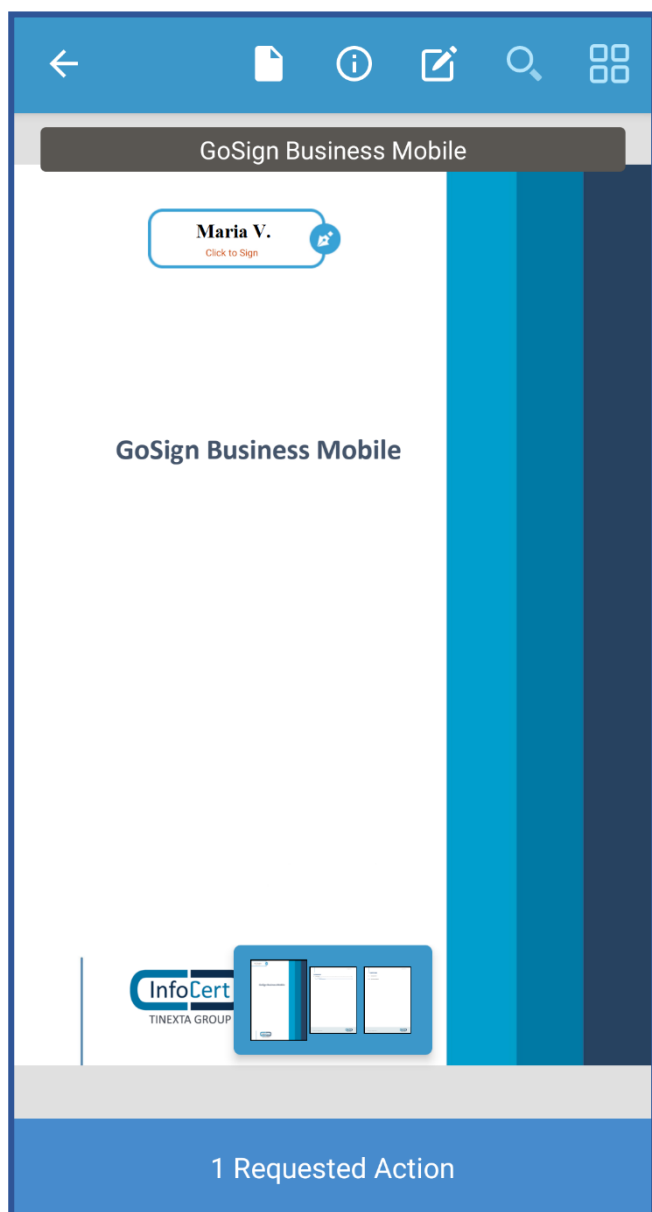
The user who logs in from the GS Business App from mobile, displays the list of practices and clicks on the one of interest.

Displays the screen for entering the PIN, provided by the person who created the case:



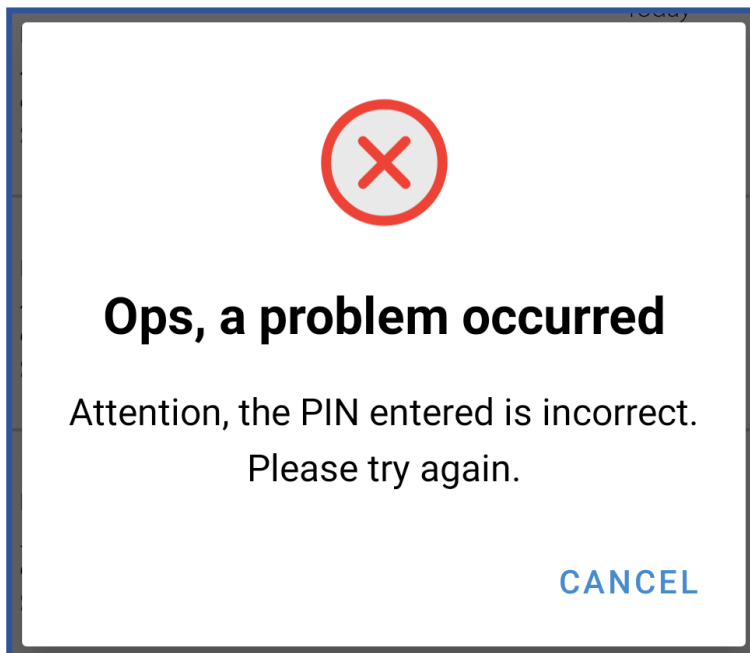
By clicking on the "CANCEL" button you have the option to cancel the operation.

After entering the PIN correctly, view the case documents.



By confirming the required slips, returning to the list of practices, and clicking on Signature, the user will complete the signature process.

By entering an incorrect PIN, the user displays a message:

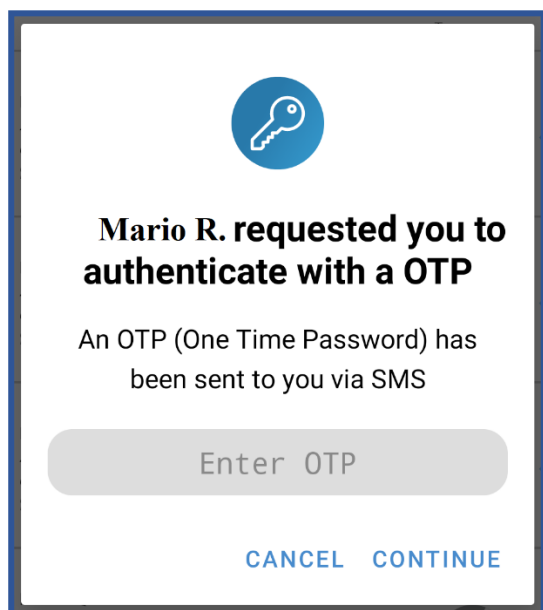


Closing the message will return to the list of practices.

21.10 SIGNING OF THE CASE WITH OTP SMS FROM THE GO SIGN BUSINESS MOBILE APP

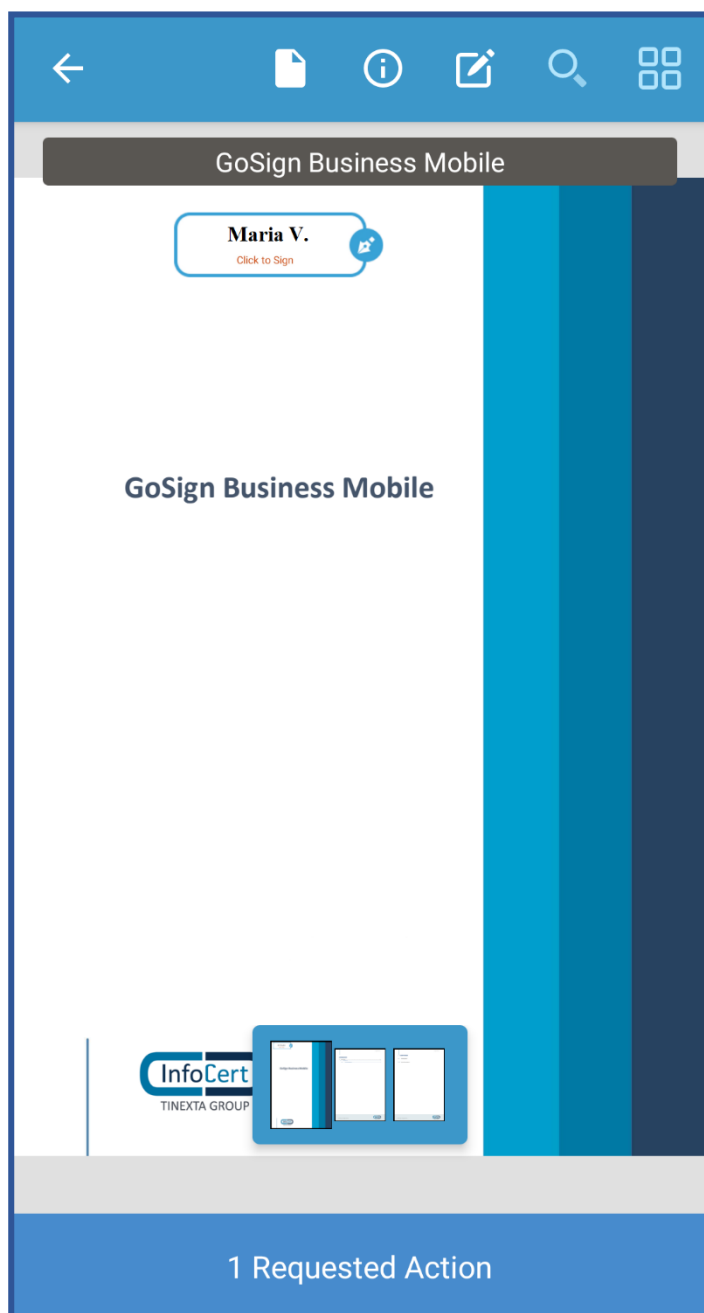
The user who logs in from the GS Business App from mobile, displays the list of practices and clicks on the one of interest.

View the screen for entering the OTP, received via SMS:



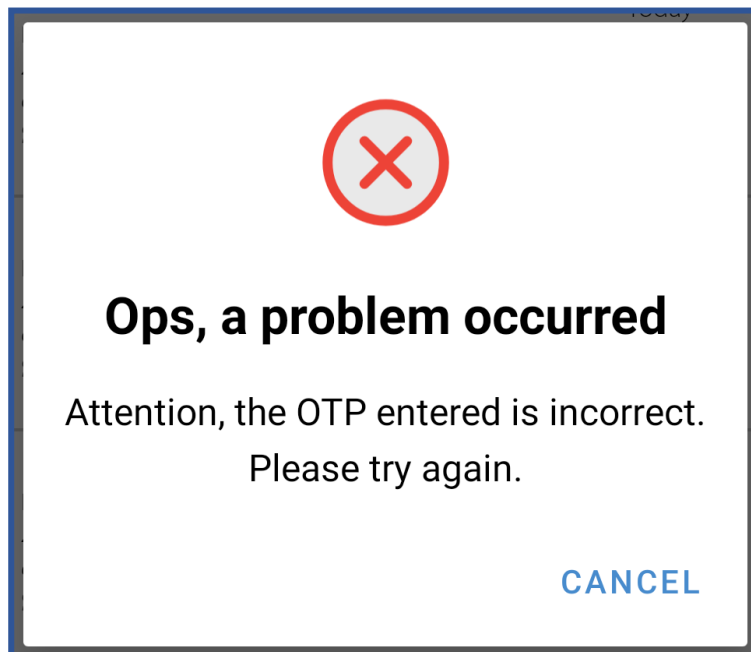
By clicking on the "CANCEL" button you have the option to cancel the operation.

After entering the OTP correctly, view the documents of the case:



By confirming the required slips, returning to the list of practices, and clicking on the signature button, the user will complete the signature process.

By entering an incorrect OTP, the user displays the message:

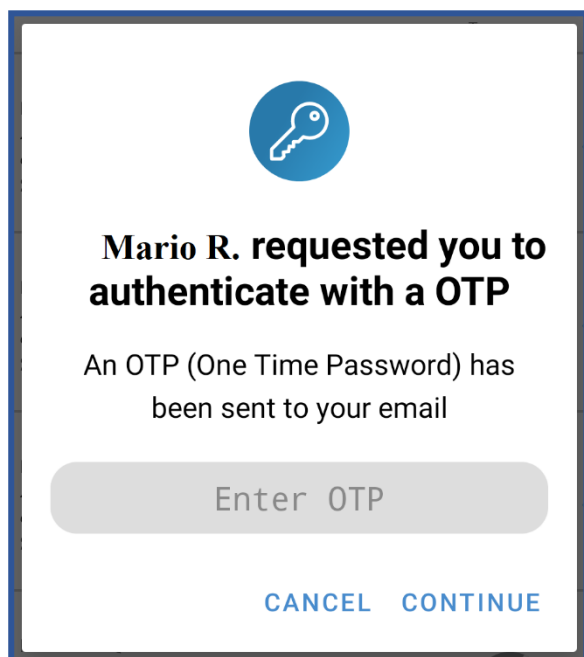


Closing the message will return to the list of practices.

21.11 SIGNING OF THE FILE WITH OTP EMAIL FROM THE GO SIGN BUSINESS MOBILE APP

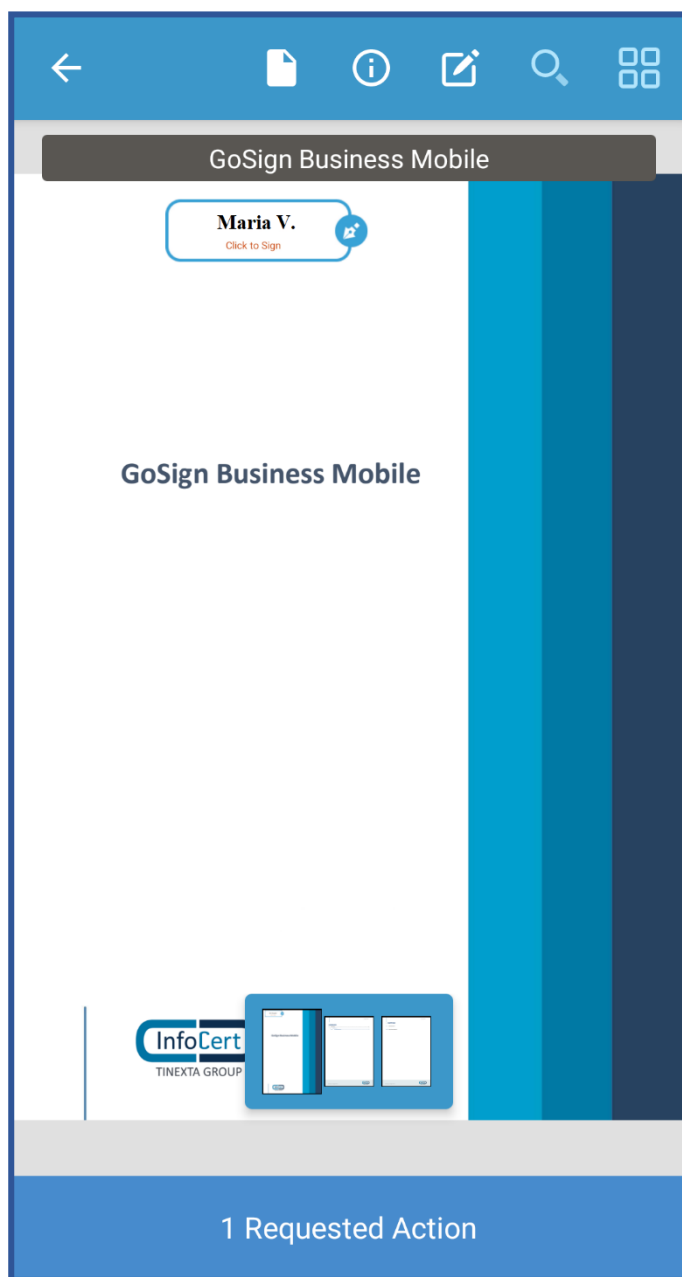
The user who logs in from the GS Business App from mobile, displays the list of practices and clicks on the one of interest.

View the screen to enter the OTP, just received via EMAIL:



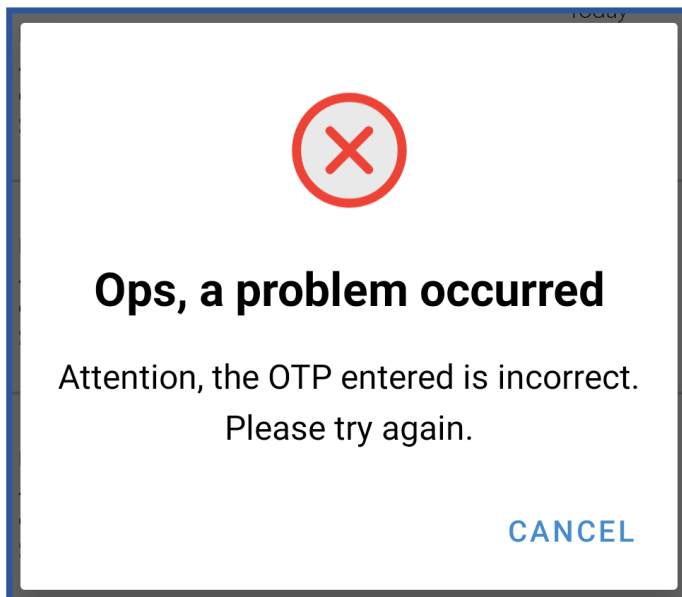
By clicking on the "CANCEL" button you have the option to cancel the operation.

After entering the OTP correctly, view the documents of the case.



By confirming the required slips and clicking on Signature, the user will complete the process and the processing of the file.

By entering an incorrect OTP, the user displays a message:



22 SIMPLE SIGNATURE WITH PASSWORD

In the event that, among the types of signature in charge, you choose the simple signature with password, you will have to follow a different procedure. The simple signature with password requires, at the time of signing, the insertion of a password for an additional level of security. When this type of signature is selected, all recipients of that task must enter their password to authorize the signature. The password is provided for both standard users and GoSign *stranger*.

- **Standard user:** When a user of this type receives a file with a simple password signing task, GS requires the user to enter the password before proceeding with the signing.

Once the signing is completed successfully, a modal notifies the user of the completion of the operation. The user can at any time reset the password, this action deletes the existing password and allows you to re-enter it.

(If the user does not have a password, he can create one directly in the signature confirmation *dialog* . If the password is expired or not configured, the user is notified with a specific message. In the case of an incorrect password, the user is notified with specific message to submit.)

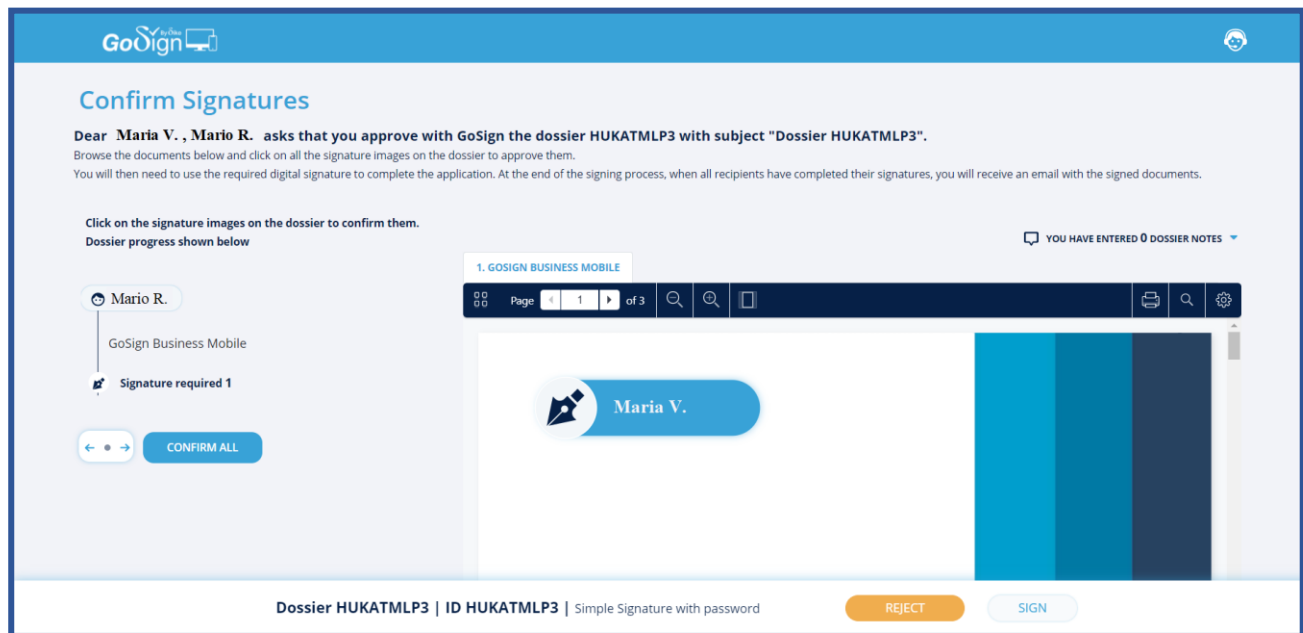
The screenshot displays the GoSign application interface for configuring a signing task. The main section is titled "RECIPIENTS AND ACTIONS" with the instruction "Choose the recipients and the order of the signatures".

- RECIPIENT:** A list containing "Mario R." with a close icon.
- REQUESTED ACTION:** A dropdown menu showing "Signature". A modal is open, displaying options: "Simple", "Simple With Password" (highlighted), "Simple With Password And Process Log", "Qualified (PDF)", and "Qualified (P7M)".
- ADDITIONAL ACTIONS:** A dropdown menu showing "Choose an additional action".
- Number of signatures:** A dropdown menu set to "1".
- Buttons:** "ADD RECIPIENT" (with a plus icon), "BULK SEND" (top right), and "NEXT" (bottom right).
- Footer:** "Dossier L22HW5OAO | ID L22HW5OAO" and a checkbox for "Customize notification emails".

- *Stranger user:* In this case the stranger user will receive a password via e-mail or sms.

In the event that the SMS option is chosen, GS obliges whoever is completing the file to enter the stranger's mobile number, if it is not already present in the address book.

Once the stranger has received the SMS or e-mail with the password, he must enter the password and confirm the signing operation.



23 IMPORT CONTACT FROM CSV AND BULK SEND

With this feature, the user who creates the dossier has the possibility to create a set of contacts by uploading a CSV file.

The creation of these contacts takes place in a massive way and they are only and exclusively STRANGER contacts.

The .CSV file contains the information:

- FIRST NAME
- SURNAME
- E-MAIL
- TAX CODE
- TELEPHONE NUMBER

The items in point 4. and 5. are dependent on the enabling on the customer who carries out the import, respectively, ***authentication with smartcard*** and ***authentication with OTP for stranger***.

The operation is available from:

- ADDRESS BOOK (accessible from the side menu;
- REQUEST SIGN (when selecting a recipient during the creation / modification of the file;
- BULKSEND (while defining a task).

23.1 THE TEMPLATE

The template can contain a maximum of 100 contacts, and cannot exceed the maximum size of 1Mb.

In the form for importing contacts, there will be a "DOWNLOAD TEMPLATE" button for downloading a template already **pre-set**.

And in the same section are indicated what information you need to enter in the template, so that the upload of STRANGER contacts is successful.

Don't know how to set up the file? Don't worry, download the template below

[DOWNLOAD THE TEMPLATE ▾](#)

Download the template

Download the template containing all the required fields. Remember to fill in all the required fields to correctly import your contacts.


✓ Name*
✓ Surname*
✓ Email Address*

[DOWNLOAD TEMPLATE](#)

The file header must always be complete

	A	B	C
1	NAME	SURNAME	EMAIL
2			
3			
4			

If the header is missing or incorrect, the import will fail and the error message will be displayed:



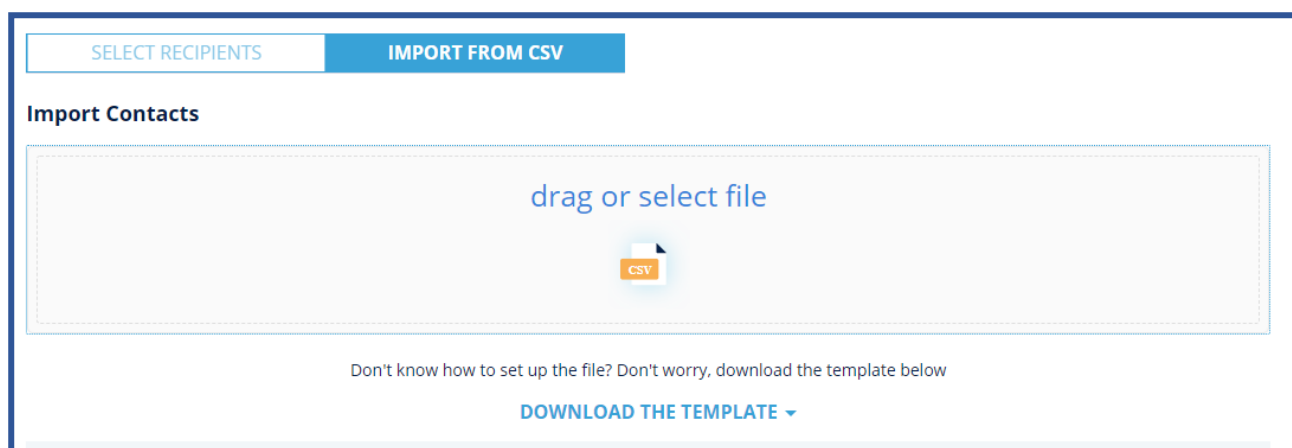
Unexpected server error

Warning. The header of the uploaded file is invalid. Download the template and try again

[Close](#)

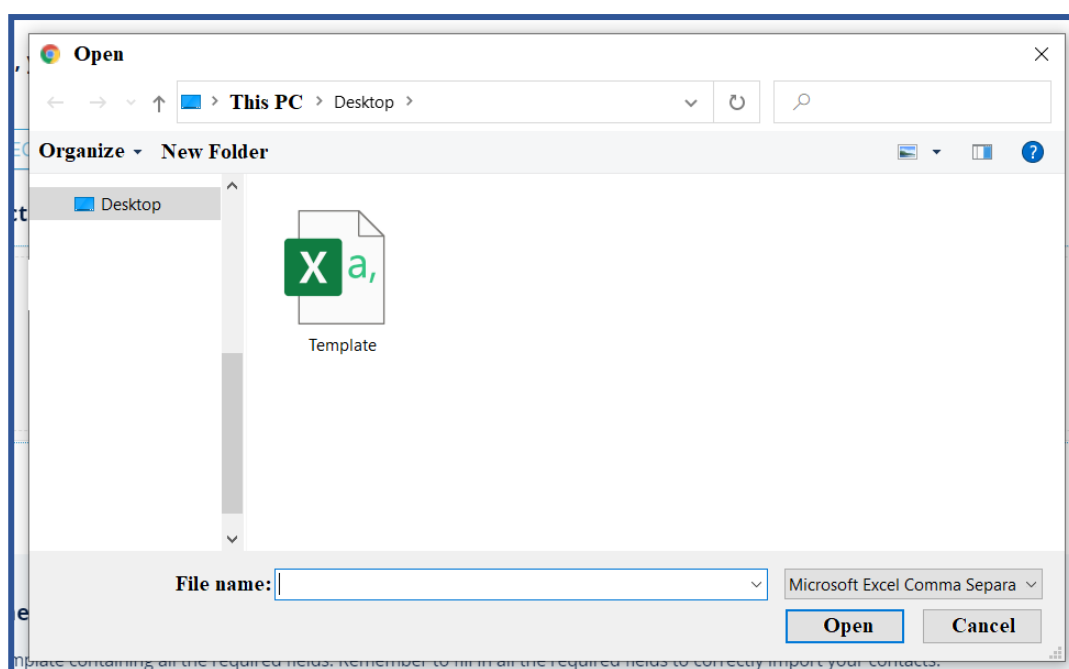
23.2 IMPORT CONTACTS

After logging in and selecting ADDRESS BOOK (accessible from the side menu), or REQUEST SIGNATURE (when selecting a recipient during the creation/modification of the file), click on "Import from CSV":

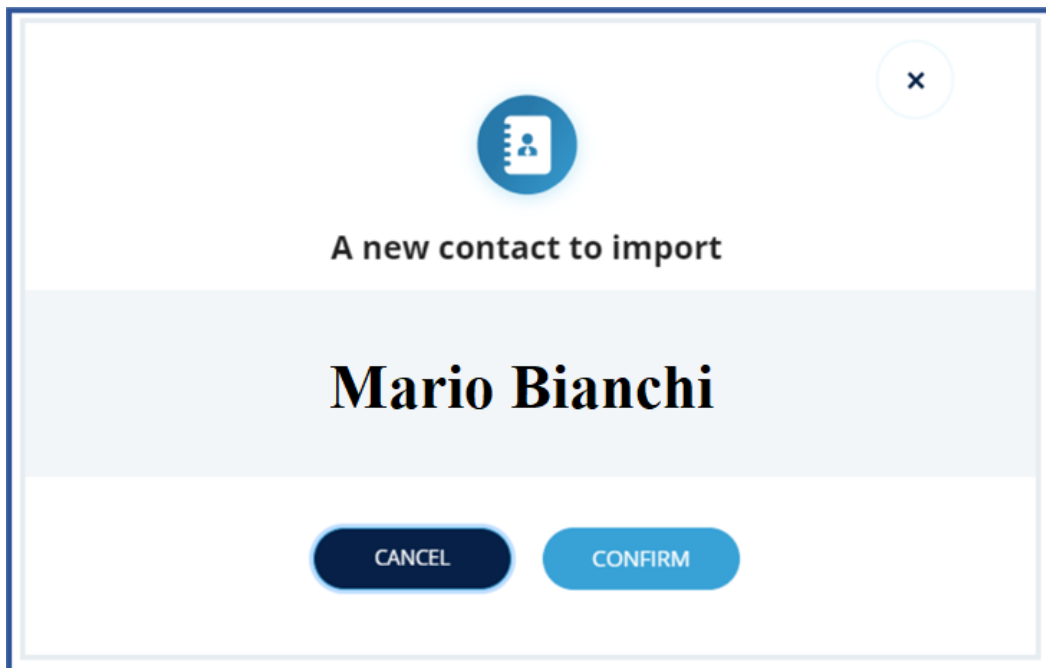


Download the template by clicking on "DOWNLOAD TEMPLATE", and fill it in with the user data to be imported, according to the file header.

Click on the "Drag or select file" link, then Upload the .CSV that you want.

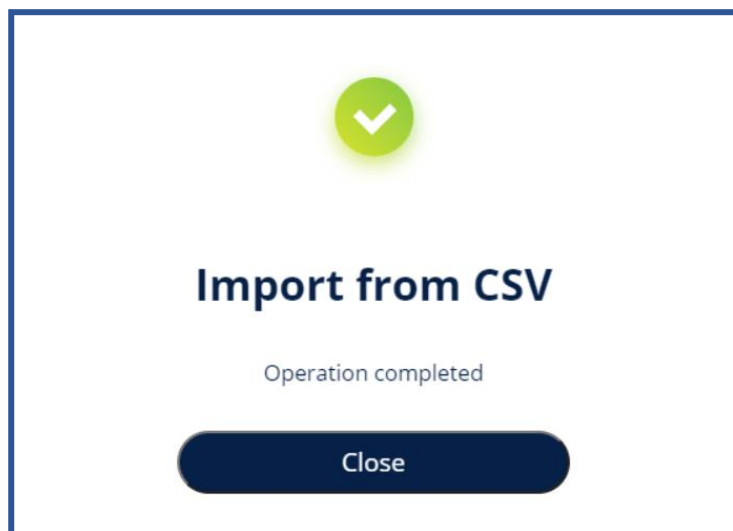


It will displays:



By clicking on "CANCEL", the screen will close. And you can repeat the operation.

By clicking on "CONFIRM", this message will be displayed:



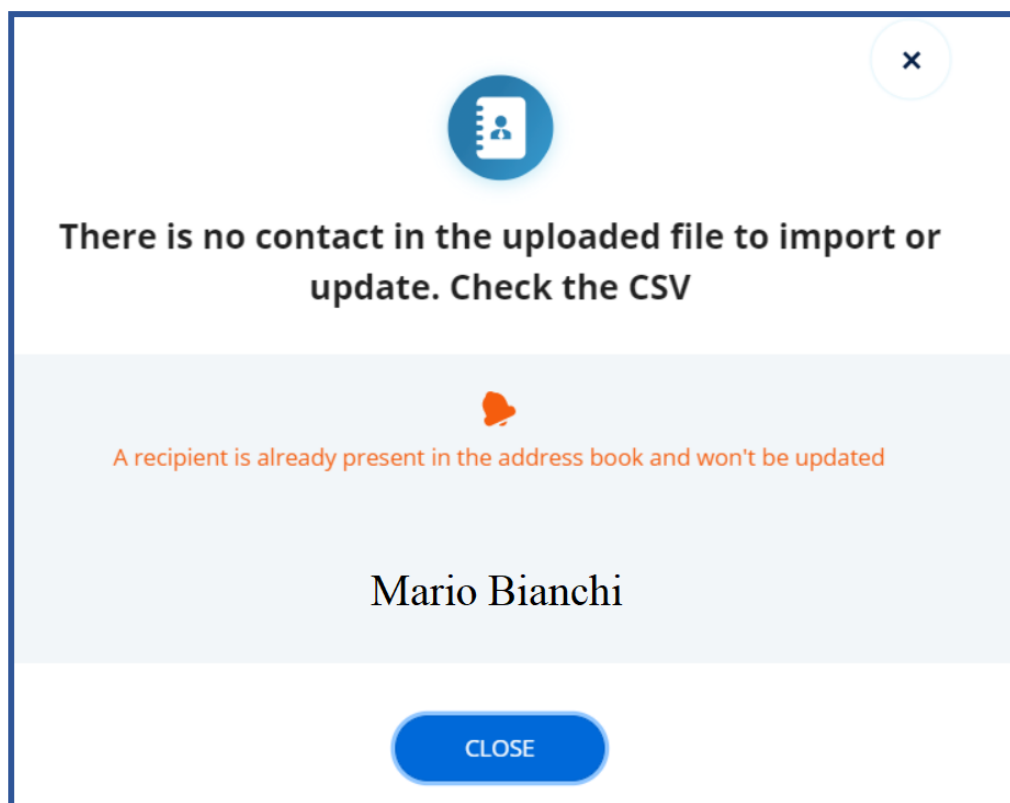
Click on "CLOSE" to close the message.

The imported contacts will now be present in the Address Book and can be selected.

ATTENTION:

1. The EMAIL field must contain a valid email, and not used by another contact already registered in the Address Book.

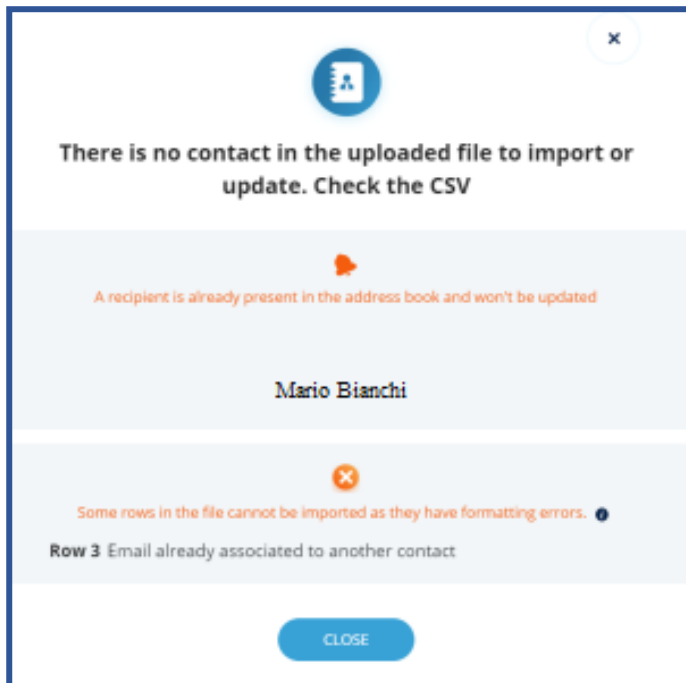
Loading a CSV with email already present in the Address Book, the error message appears.



Click on "CLOSE" to close the message and return to the previous screen.

2. The EMAIL field must contain a valid email and POSSIBLY it must NOT be repeated within the same CSV.

Loading a CSV with an email that is present several times in the file, it will appear:



By clicking on "CONFIRM" the first contacts with different emails are loaded.

An error message is also visible that warns the user that some lines cannot be imported due to an error: in our example case, in line 3 there is a contact who has the same email as the first and therefore will not be registered.

By clicking on "CANCEL" the operation will be canceled and you will be returned to the previous screen.

23.3 ENABLING BY SUPERADMIN, AUTHENTICATION WITH SMARTCARD


By selecting "Import from CSV", a fourth item TAX CODE will be available in the "Download template" section (in addition to NAME, SURNAME, EMAIL ADDRESS).

SELECT RECIPIENTS

IMPORT FROM CSV

Import Contacts

drag or select file



Don't know how to set up the file? Don't worry, download the template below

[DOWNLOAD THE TEMPLATE ▾](#)

By downloading the template, the following will now be available:

	A	B	C	D	E
1	NAME	SURNAME	EMAIL	FISCAL CODE	
2					

23.4 ENABLING BY SUPERADMIN, AUTHENTICATION WITH OTP


By selecting "Import from CSV", a fourth item PHONE NUMBER will be available in the "Download the template" section (in addition to NAME, SURNAME, EMAIL ADDRESS).

SELECT RECIPIENTS

IMPORT FROM CSV

Import Contacts

drag or select file



Don't know how to set up the file? Don't worry, download the template below

[DOWNLOAD THE TEMPLATE](#)

By downloading the template, the following will now be available:

	A	B	C	D	E
1	NAME	SURNAME	EMAIL	PHONE_NUMBER	
2					
3					
4					
5					

23.5 ENABLING BY SUPERADMIN, AUTHENTICATION WITH SMARTCARD AND AUTHENTICATION WITH OTP

By selecting "Import from CSV", in the "Download the template" section, the following will be available: TAX CODE and TELEPHONE NUMBER (as well as NAME, SURNAME, EMAIL ADDRESS).

By downloading the template, the following will now be available.

	A	B	C	D	E
1	NAME	SURNAME	EMAIL	PHONE_NUMBER	FISCAL_CODE
2					
3					
4					

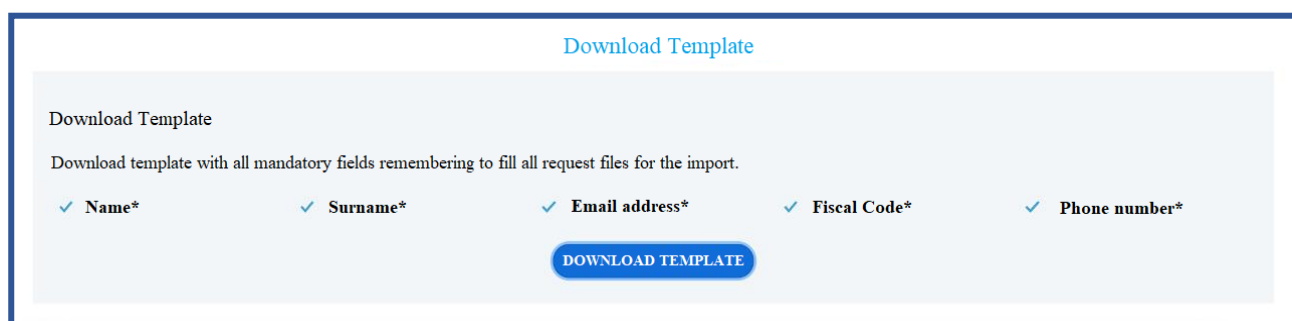
i The configurations in point 4 and 5 can also be enabled simultaneously.

23.6 UPDATING AN EXISTING CONTACT

It is possible to update the information of a stranger contact already present in the Address Book, if the corresponding email has not already been registered for the NAME, SURNAME, TAX CODE AND TELEPHONE NUMBER fields.

Therefore, for the operation to be possible, the superadmin must enable **authentication with smartcard** or **authentication with OTP** or both configurations at the same time.

Download the template by clicking on "DOWNLOAD TEMPLATE", and fill it in with the user data to be imported, according to the file header.



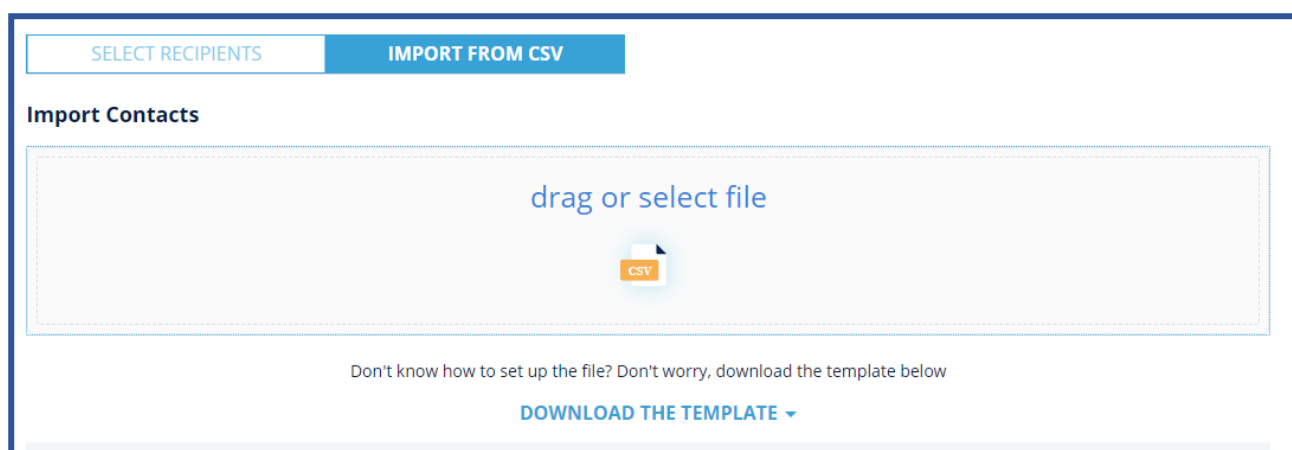
Download Template

Download template with all mandatory fields remembering to fill all request files for the import.

✓ Name* ✓ Surname* ✓ Email address* ✓ Fiscal Code* ✓ Phone number*

DOWNLOAD TEMPLATE

Click on the "Drag or select file" link, then Upload the .CSV that you want.



SELECT RECIPIENTS IMPORT FROM CSV

Import Contacts

drag or select file

CSV

Don't know how to set up the file? Don't worry, download the template below

DOWNLOAD THE TEMPLATE

It will be displayed the message "the recipient is already in the address book and will be updated".

By clicking on confirm the contact will be updated and will be visible in the Address Book section.

23.7 BULK SEND

The "BULK SEND" function is available during the "REQUEST SIGNATURE", only if another task is not already defined, in addition to the first one in the process.

The user has the possibility to create a dossier for each of the contacts selected from the address book.

If more than one task has been defined in the process, the BULK SEND function is not available.

The screenshot displays the 'Create dossier' interface within the 'REQUEST SIGNATURE' stage. The top navigation bar includes 'REQUEST SIGNATURE' and 'SIGN AND SEND'. The date 'TUESDAY 6 Jul 2021' is shown in the top right. The main heading is 'Create dossier'. Below it, a breadcrumb trail shows 'ASSIGN THE DOSSIER' and 'PLACE SIGNATURES'. The 'UPLOAD DOCUMENTS' section features a document list with a '1.4' label, a '+' button, and a '4' count. A document card is visible with a PDF icon, the subject 'Dossier LE4J3RDZ1', and a 'Deadline' field. To the right of the document card, there is a toggle for 'Urgent dossier' and three icons: a lock, a trash can, and an eye. Below the document card, there is a link for 'OTHER SETTINGS'. The 'RECIPIENTS AND ACTIONS' section at the bottom has the instruction 'Choose the recipients and the order of the signatures'. A red circle highlights the 'BULK SEND' button in the bottom right corner.

The import of the contacts takes place as described previously, through Import contacts.

The only difference is that in this case, the recipients simultaneously imported will already be selected in the address book to proceed with the definition of the recipients.

Bulk Send

SELECT RECIPIENTS | IMPORT FROM CSV

CONTACTS | Search Address Book

Name	Email	
Roberto	robertorossi@infocert.it	☆
Maria	mariaverdi@infocert.it	☆

Results per page 5 | 1 - 3 of 3

2 contacts | COMPACT VIEW | + ADD EXTERNAL CONTACT | CONFIRM

Click on "CONFIRM", in the "recipients" section of the task there will be a Group made up of the users just selected:

RECIPIENTS AND ACTIONS | You have set up Bulk Send | CANCEL

Choose the recipients and the order of the signatures

1

RECIPIENT | Complete the tasks to continue

Contact group (3)

REQUESTED ACTION | Signature Type | Number of signatures

Select an action | Signature | Signature Type | Number of signatures

+ ADD RECIPIENT

Click on "Next", insert the requested actions of interest and send the dossier.

24 QUICKSTART (FOR USERS WITHOUT DIGITAL SIGNATURE)

24.1 QUALIFIED SIGNATURE (PDF) WITH VIDEOCHAT IDENTIFICATION

The *Request Signature* feature allows you to send documents to multiple recipients, to request their signature on the documents included in the dossier.

The screenshot displays the GoSign web application interface for creating a dossier. The left sidebar contains navigation links: Configure, Address Book, Electronic signature, Reports, and Templates. The main content area is titled 'Create dossier' and shows a progress bar with two steps: 'ASSIGN THE DOSSIER' and 'PLACE SIGNATURES'. Under the 'UPLOAD DOCUMENTS' section, a PDF file named 'FILE01' is uploaded, with the subject 'Dossier HS9QRZ0UE'. Below this, the 'RECIPIENTS AND ACTIONS' section allows selecting recipients and actions. A table shows one recipient with 'Requested Action' set to 'Signature' and 'Signature Type' set to 'Qualified Signature PDF'. An 'Apply to all recipients' toggle is present. At the bottom, the dossier ID 'HS9QRZ0UE' is displayed.

If you select the signature type **Qualified Signature PDF** in *Additional Actions* section, you can choose the option **Request Identification**.

GoSign

RECIPIENTS AND ACTIONS
Choose the recipients and the order of the signatures

RECIPIENT *
Mario Rossi

REQUESTED ACTION
Select an action: Signature

Signature Type *
Qualified (PDF)

Number of signatures *
1

ADDITIONAL
Request identification: Identification by VIDEO CHAT will only take 9 minutes

Request identification
Do you want to add an identification method?

CONFIRM **CANCEL**

ADD RECIPIENT

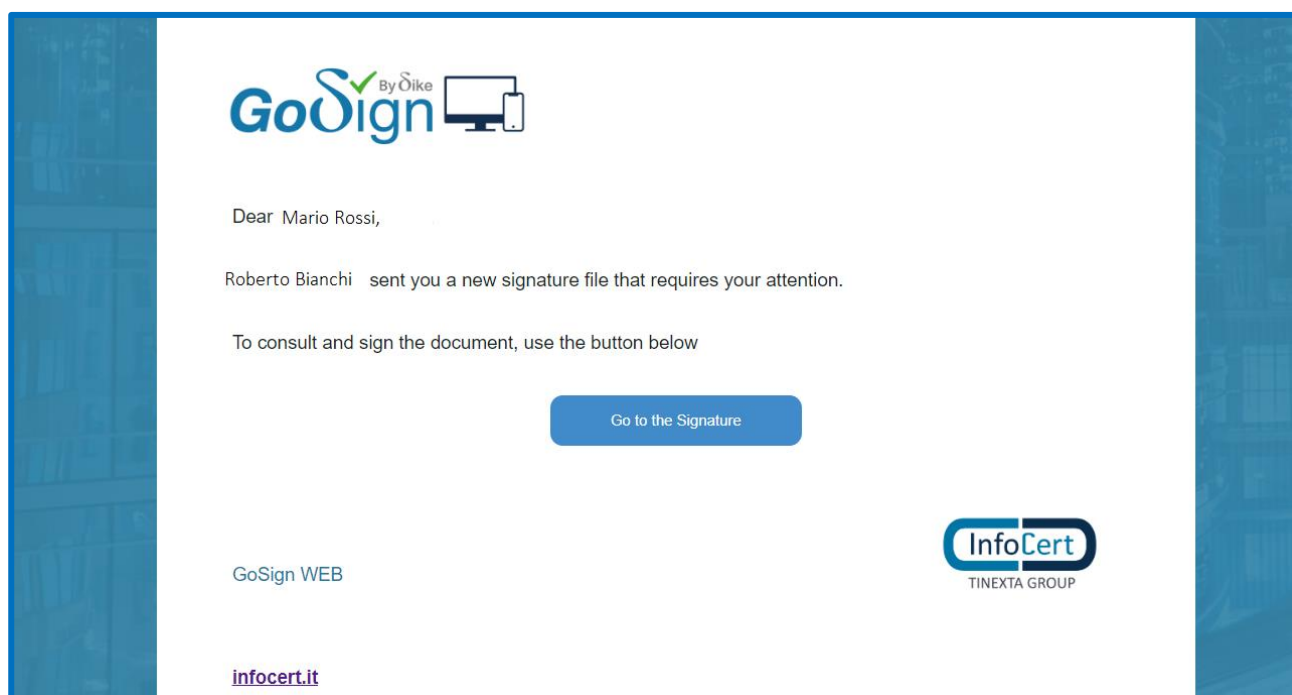
[Customize notification emails](#)

[Add recipients in copy](#)

Dossier DWAD5ZU3G | ID DWAD5ZU3G **NEXT**

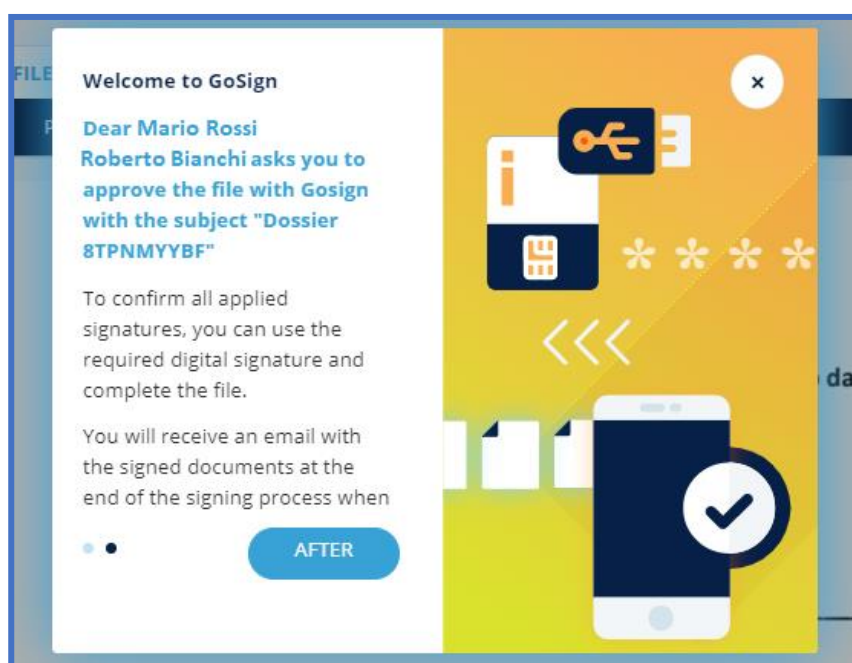
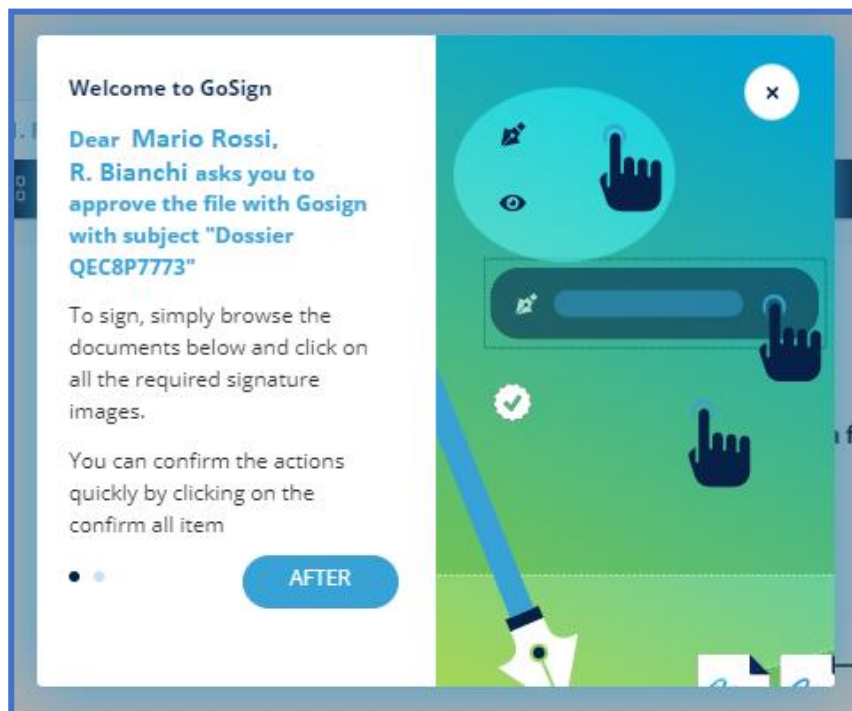
The system will notify you that the recipient can choose the method of identification, through video identification or Spid. The dossier creation process can continue as standard procedure.

Once the file has been generated, the receiver, in this case registered as a Stranger or external contact, will receive an email inviting him to sign the file.

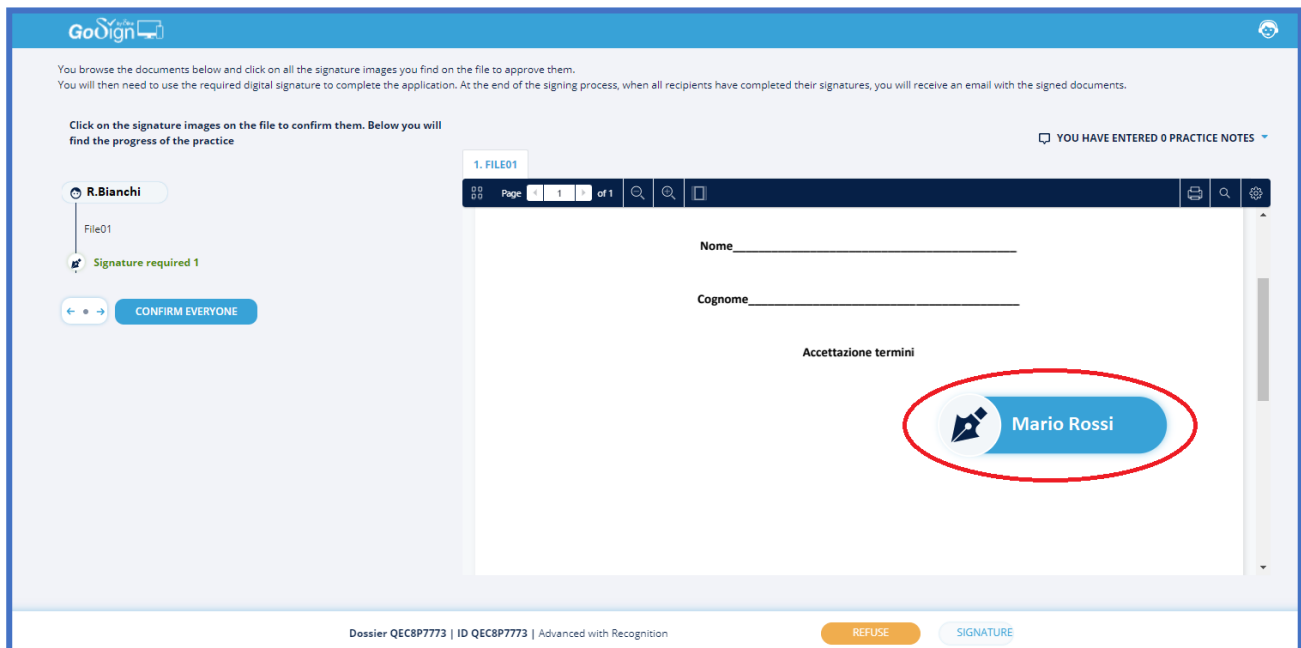


By clicking on *Go to the signature* the web page opens with the subscription procedure.
The invitation email is sent to the e-mail address declared by the Customer.

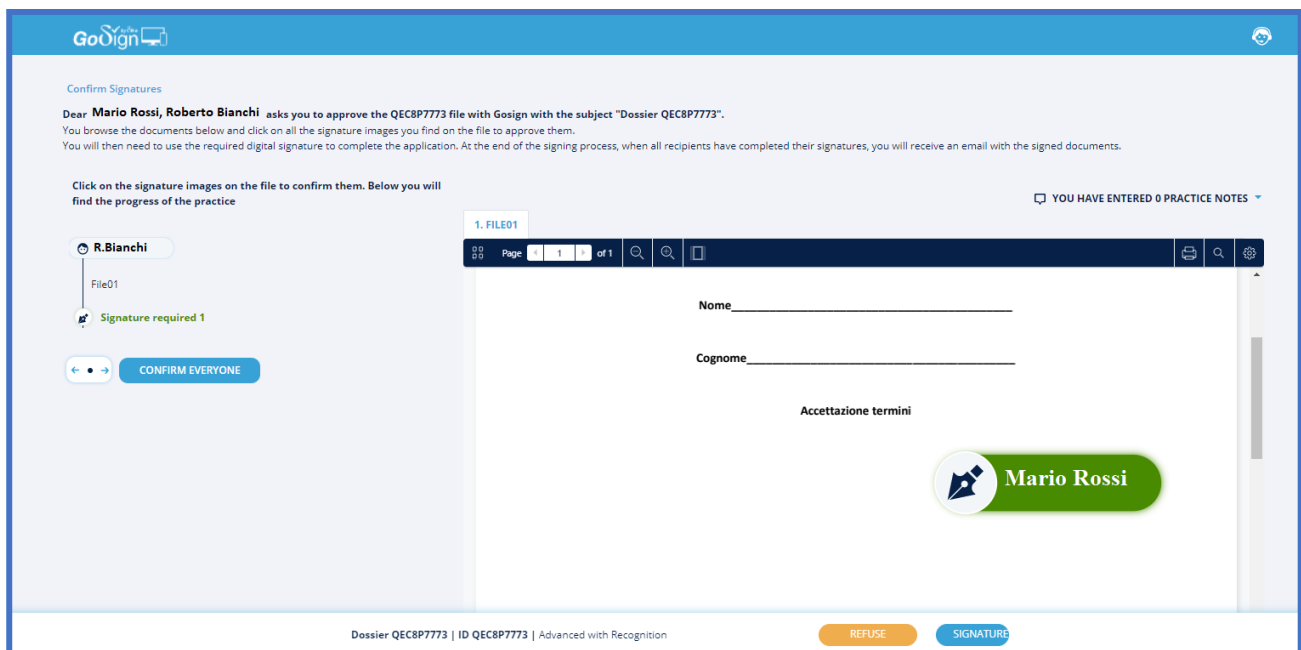
Before viewing the documents to be signed, a short tutorial explains to the user how to continue.



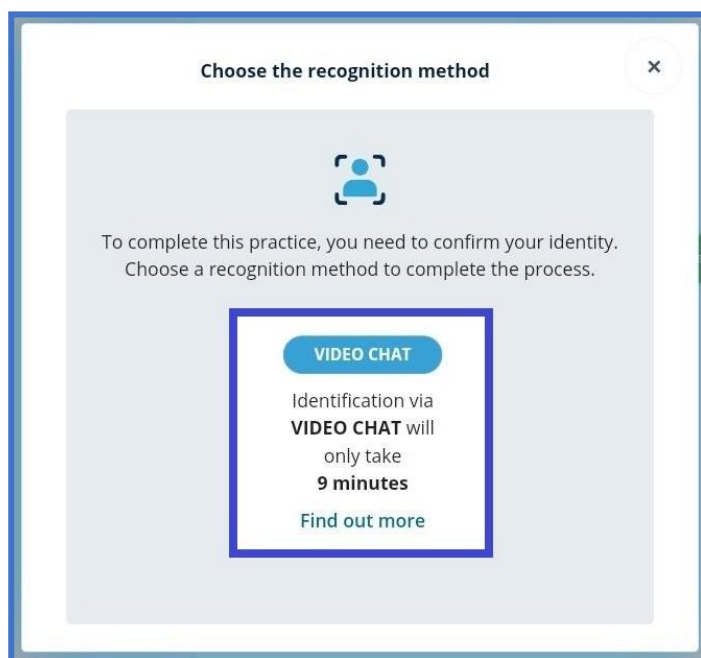
The user views the documents, can browse them and can accept their subscription or by clicking directly within the defined signature fields or by clicking on the *Confirm Everyone* button.



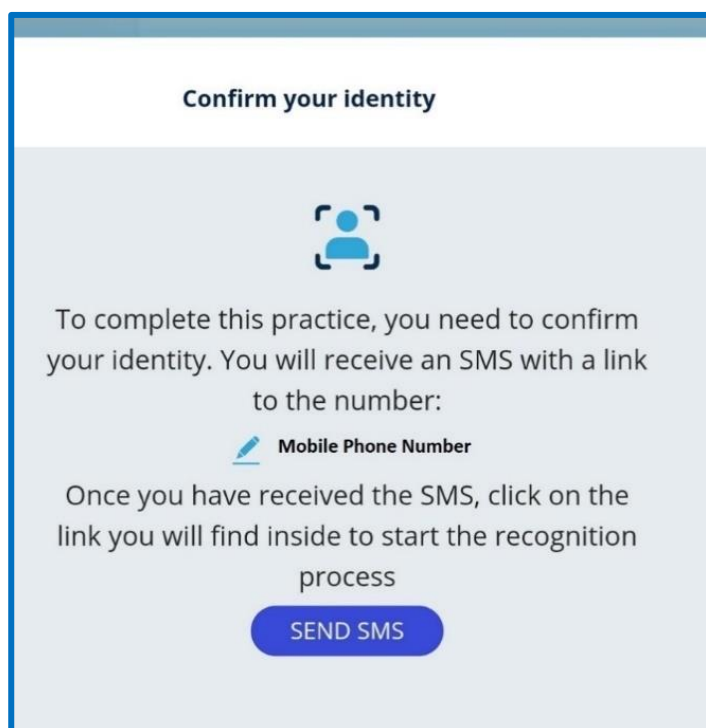
Once the sign is ready, the signature fields turn green. By clicking on the *Signature* button, he can proceed to the subscription.



The only method to continue is choosing the *Videochat* recognition type.




After clicking on Videochat Identification, a window, where is asked to confirm or enter the phone number to receive the link via SMS, will be opened.




Now it is possible to process with Videochat by clicking on the link received via SMS.

Recognize in 9 minutes


HERE'S WHAT YOU NEED



Take or upload a photo of your ID documents



Verify that your personal information is correct



Complete the identification in video chat with one of our operators

[Start](#)

Why are you asking me for this data?

It is necessary to read and accept the privacy policy.

Privacy

Disclosure statement

I declare that I have read the information notice on the protection of personal data provided by InfoCert S.p.A. pursuant to the GDPR

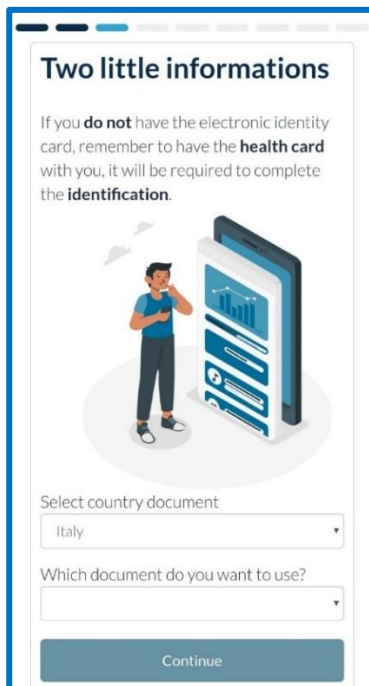
a. I agree to the processing of Data in relation to the sending by the Data Controller of commercial and/or promotional communications relating to own products/services of any kinds or products/services of other companies **(optional consent)**

☐ Yes ☐ No

b. I agree to the communication or transfer of Data to other companies who will use them for

Now is possible to select the type and nationality of the document.
The documents selectable are the follows:

- Paper identity card;
- Electronic identity card;
- Passport.



Two little informations

If you **do not** have the electronic identity card, remember to have the **health card** with you, it will be required to complete the **identification**.

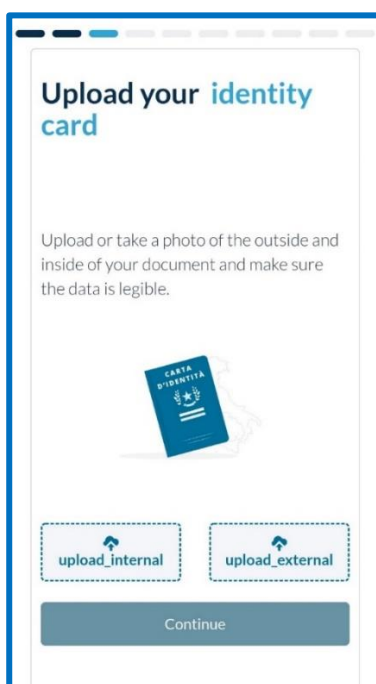
Select country document

Italy

Which document do you want to use?

Continue

Now it is possible to proceed to upload the document.



Upload your identity card

Upload or take a photo of the outside and inside of your document and make sure the data is legible.

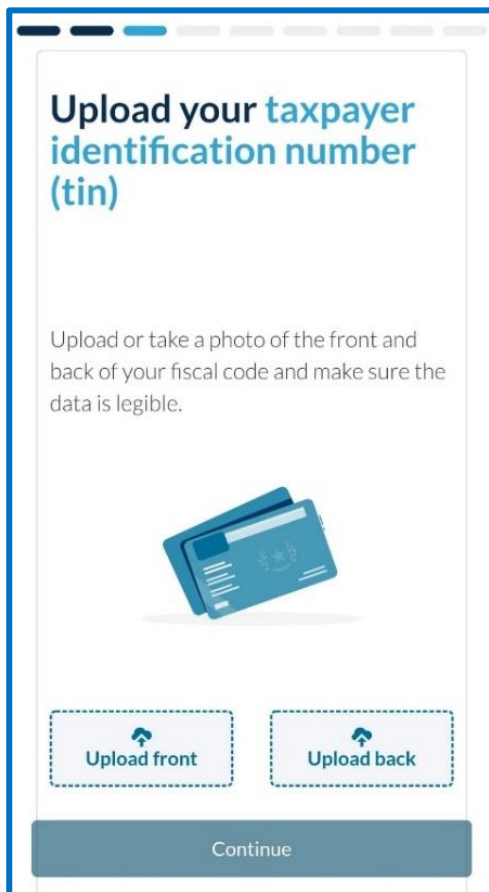
CARTA D'IDENTITÀ

upload_internal

upload_external


Continue


The following step is to load the health card.




Upload your taxpayer identification number (tin)

Upload or take a photo of the front and back of your fiscal code and make sure the data is legible.



 Upload front

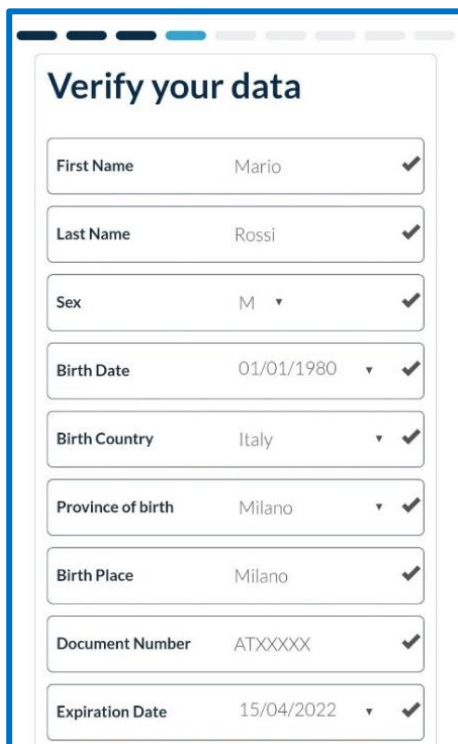
 Upload back

Continue



If you have chosen as a document to load an electronic identity card you will not be required to upload the health card as the Fiscal Code is already present on the Identity Card.

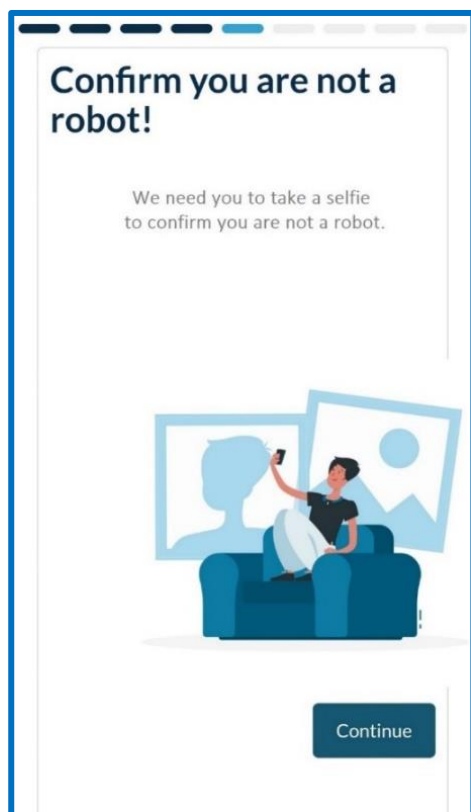
The following step is to check the personal data and edit or validate it.



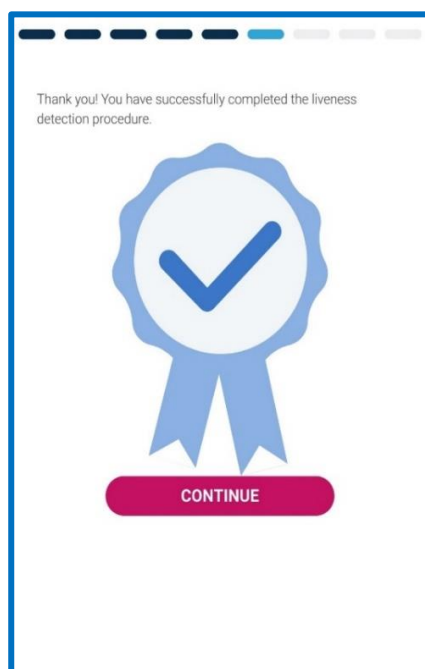
A screenshot of a mobile application screen titled "Verify your data". The screen displays a list of personal data fields, each with a value and a checkmark icon indicating it has been verified. The fields are: First Name (Mario), Last Name (Rossi), Sex (M), Birth Date (01/01/1980), Birth Country (Italy), Province of birth (Milano), Birth Place (Milano), Document Number (ATXXXXX), and Expiration Date (15/04/2022). The form is enclosed in a blue border.

Field	Value	Status
First Name	Mario	✓
Last Name	Rossi	✓
Sex	M	✓
Birth Date	01/01/1980	✓
Birth Country	Italy	✓
Province of birth	Milano	✓
Birth Place	Milano	✓
Document Number	ATXXXXX	✓
Expiration Date	15/04/2022	✓

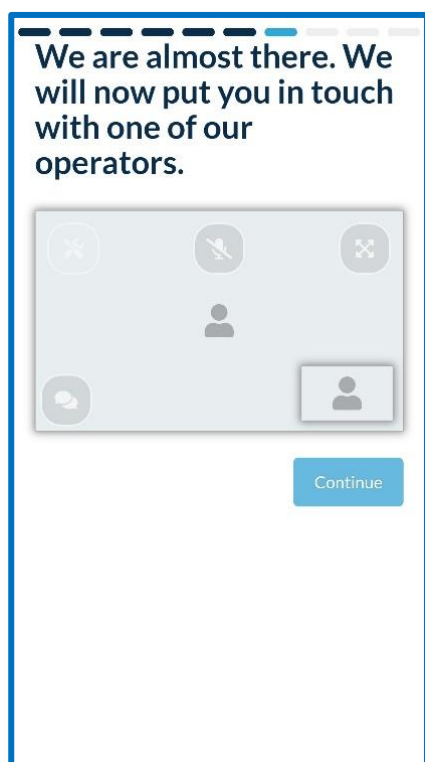
In order to confirm not to be a robot, the system will ask to take a selfie.



The procedure will be confirmed by the system.



The following step is the identification through an operator who will carry out the video recognition.



Once the recognition is complete, the certificate have to be request.

Get your certificate

Request the certificate

Please review the General Terms and Conditions of the AdI S Service provided by InfoCert S.p.A., which you are invited to download:

- Terms and Conditions of Service
- PKI Disclosure Statement – Advanced Electronic Signature (PDS)
- Privacy Policy Statement

I, the undersigned, by clicking on the button "REQUEST THE CERTIFICATE":

- confirm that my personal data as provided by me and included in the Activation Application, which I have read, are true and accurate and that I am aware that any false statements shall be punishable under applicable criminal law provisions;
- hereby request that InfoCert S.p.A. issue a Advanced Certificate according to the terms specified in the agreement that I have downloaded;
- if a consumer, you acknowledge that, because of its nature, the service will be performed immediately and I therefore accept that I may not withdraw from the agreement, as explained in detail in Article 5 of the following General Terms and Conditions.

Request The Certificate

By clicking on *Request the certificate* an SMS will be sent with an OTP code to be entered to proceed to the signature.

Enter the OTP you received

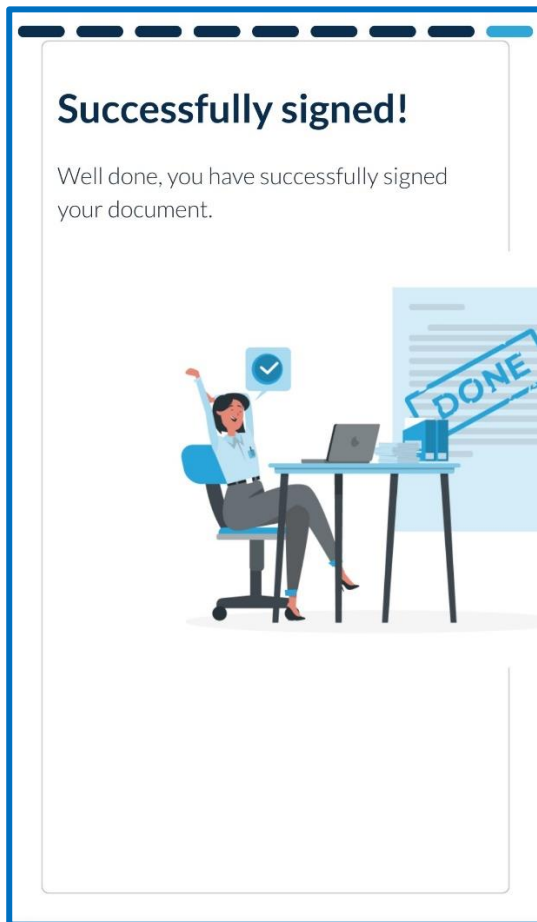
To complete the sign process, Enter the OTP you received.

• • • • • • •

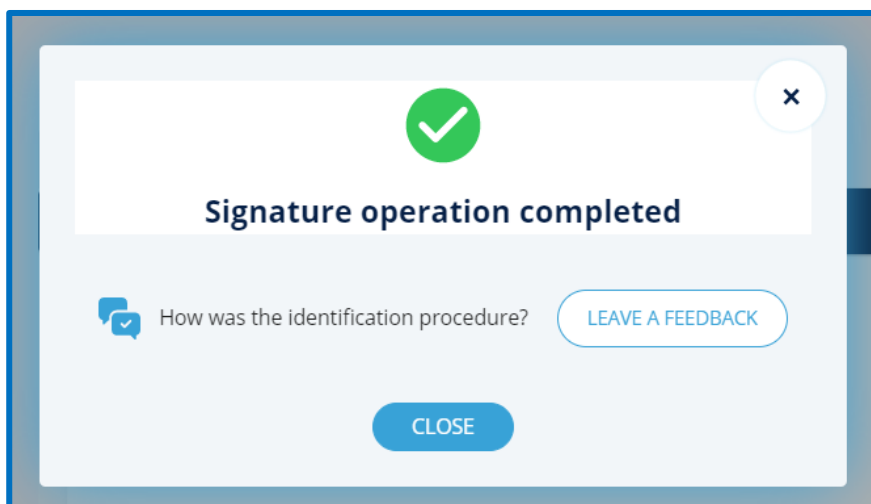
I did not received any OTP code,
[Send a new OTP](#)

Continue

Once the OTP has been entered, a message on the screen will confirm the operation.



Once the identification process is complete, it will be redirected to GoSign.

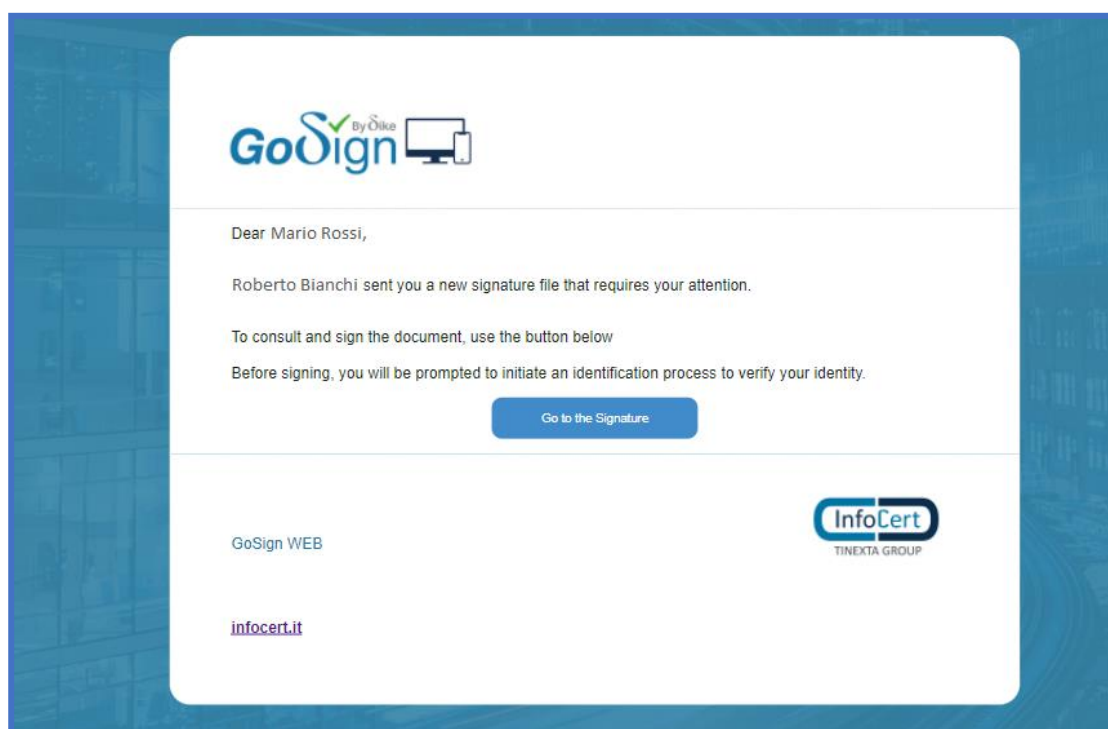


24.2 ADVANCED ELECTRONIC SIGNATURE/SELF ID IDENTIFICATION

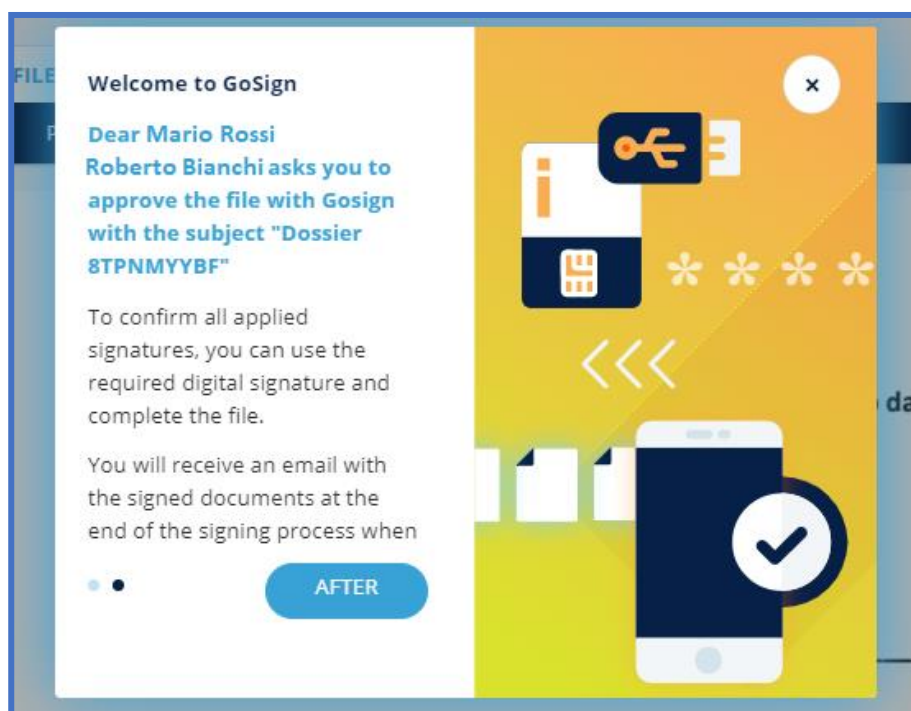
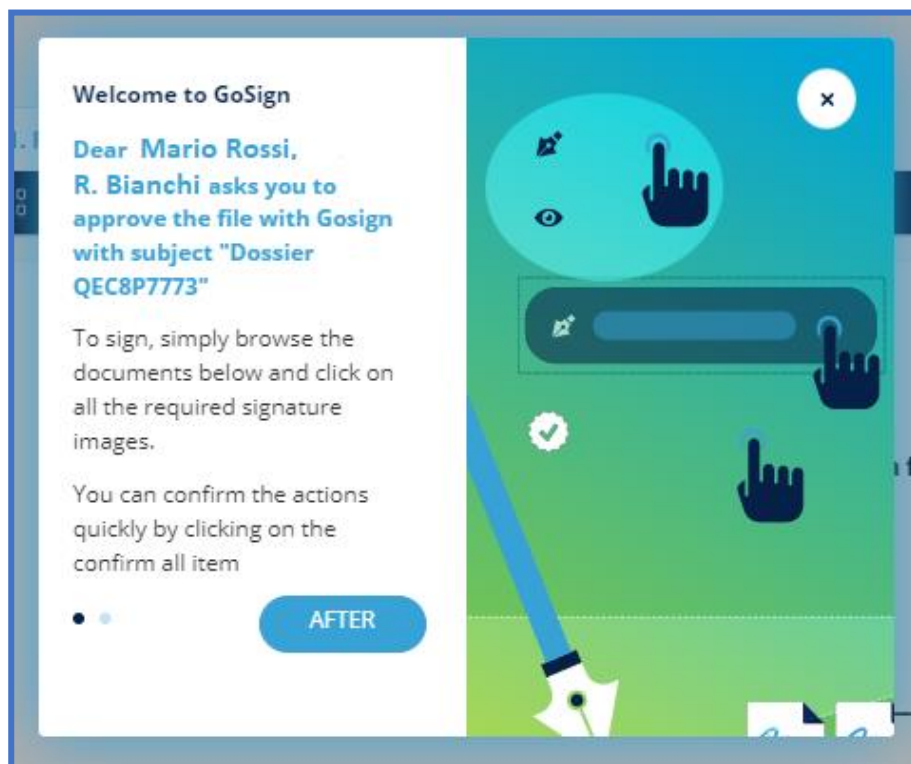
The *Request Signature* feature allows you to send documents to multiple recipients, to request their signature on the documents included in the dossier. If you select the signature type **Advanced with identification** in *Additional Actions* section, the identification request will be entered by default. The process of dossier creation ends as per standard procedure.

The screenshot displays the GoSign web application interface. At the top, there's a navigation bar with 'GoSign' logo and user icons. Below it, a breadcrumb trail shows 'ADD NEW DOSSIER' > 'PLACE SIGNATURES'. The main area is divided into two primary sections: 'UPLOAD DOCUMENTS' and 'RECIPIENTS AND ACTIONS'. In the 'UPLOAD DOCUMENTS' section, a document titled 'FILEPROVA' with subject 'Dossier NH8AGQ7Y0' is shown. Below this, the 'RECIPIENTS AND ACTIONS' section lists a recipient 'Mario Rossi'. For this recipient, the 'REQUESTED ACTION' is set to 'Signature', and the 'Signature Type' is 'Advanced With Identification'. The 'ADDITIONAL ACTIONS' section shows a dropdown menu with 'Request Identification: YES' selected. A 'NEXT' button is located at the bottom right of the interface.

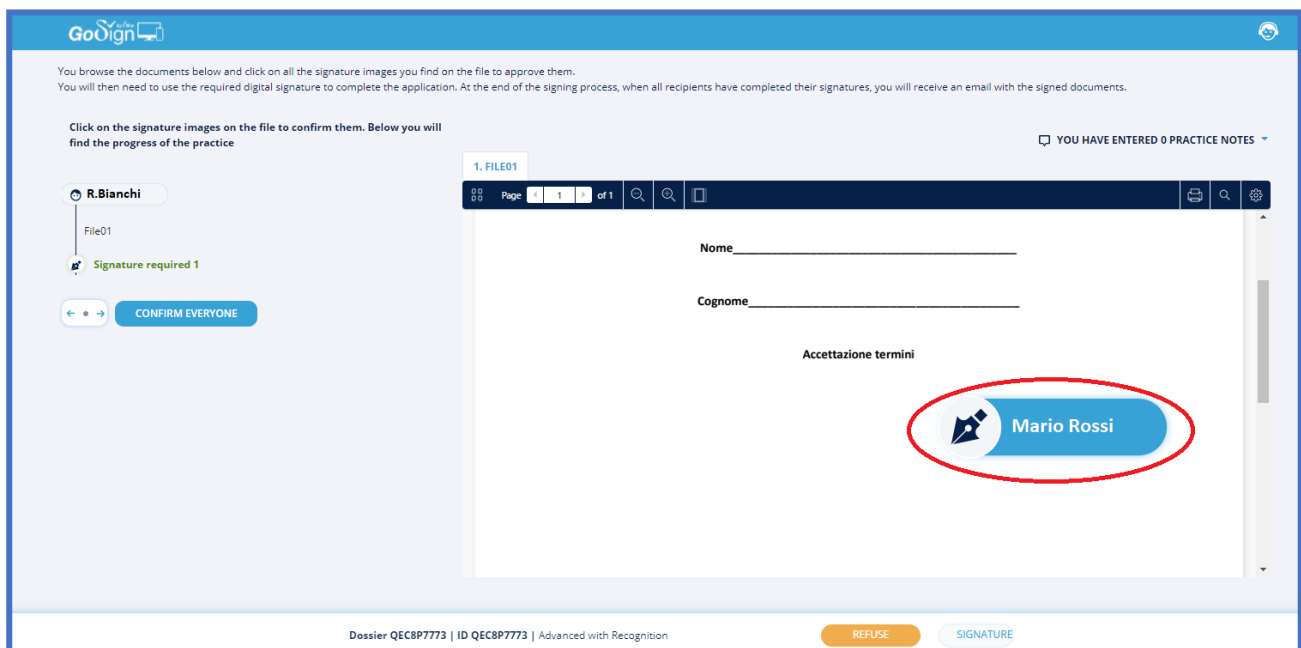
Once the file has been generated, the Signatory user, in this case registered as Stranger or external contact, receives an email inviting the signing of the file.



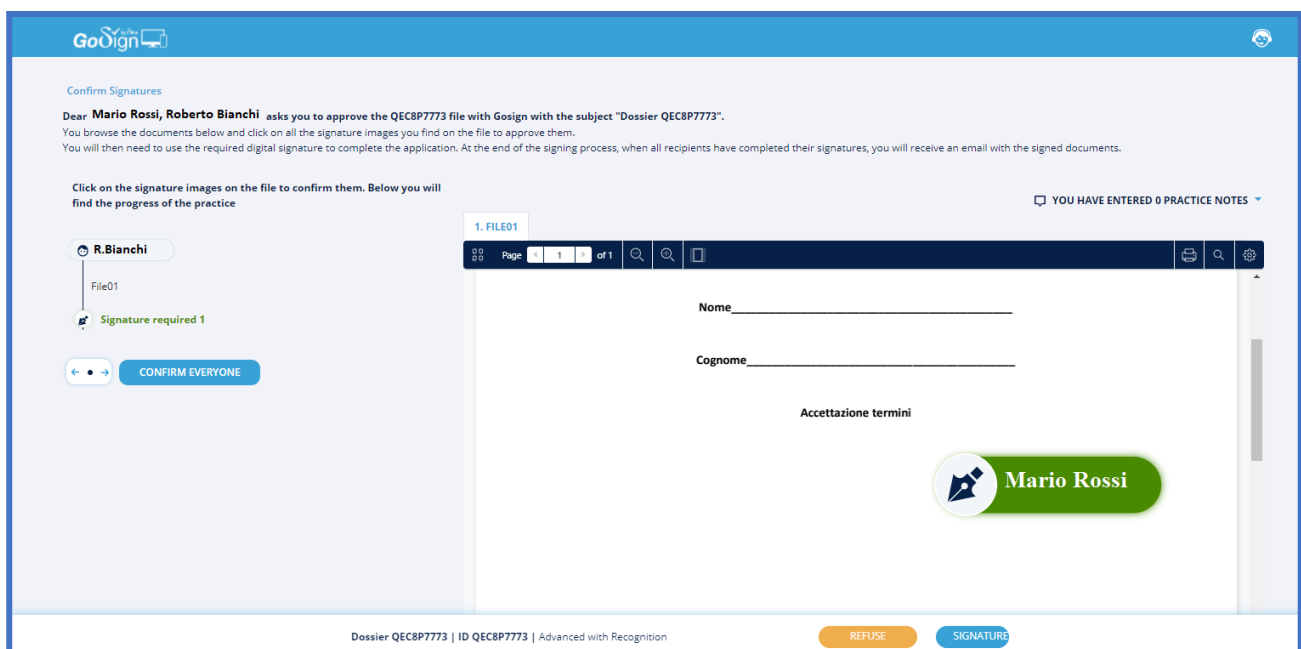
By clicking on Go to The Signature, the web page opens with the subscription procedure. The invitation email is sent to the e-mail address declared by the Customer, but not yet certified. Before viewing the documents to be signed, a short tutorial explains to the User how to continue.



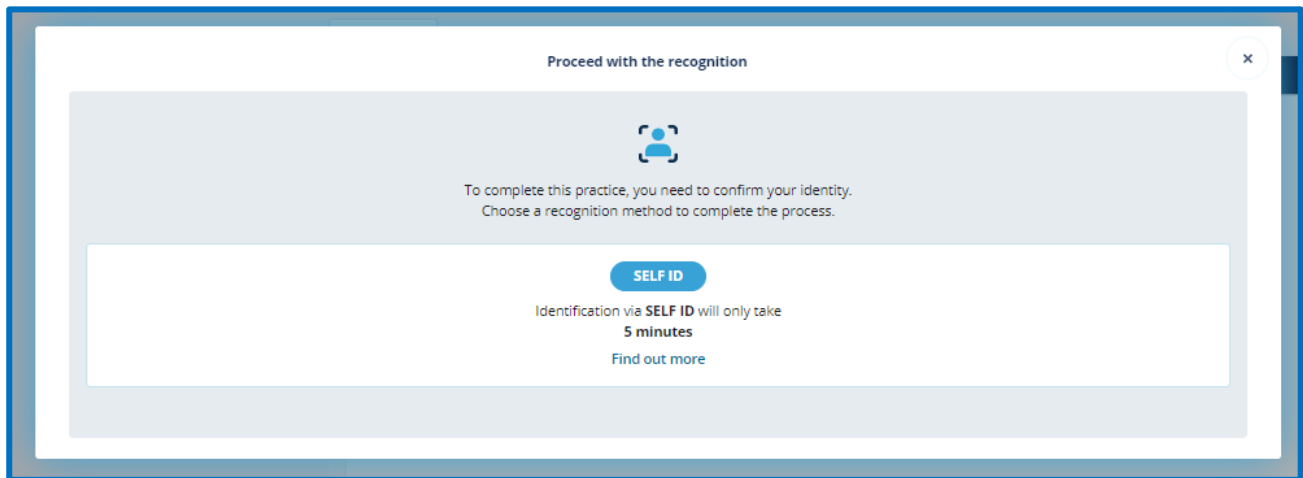
The user views the documents, can browse them and can accept their subscription or by clicking directly within the defined signature fields or by clicking on the *Confirm Everyone* button.



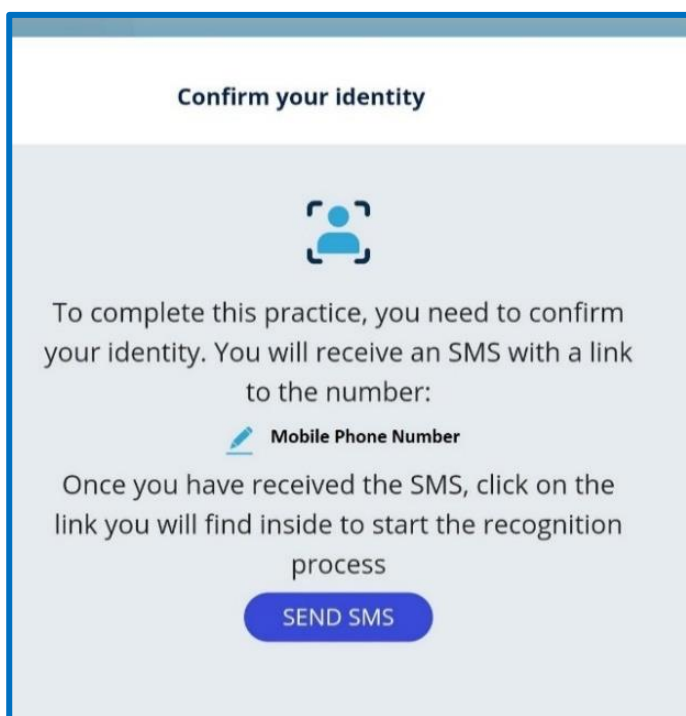
Once the sign is ready, the signature fields turn green. By clicking on the *Signature* button, he can proceed to the subscription.



The user can proceed to choose only recognition via **SELF ID**.




A window opens asking the recipient to confirm or enter the phone number to which a link will be sent via SMS.




Now it is possible to process with SELFID by clicking on the link received via SMS.

Recognize in 9 minutes


HERE'S WHAT YOU NEED



Take or upload a photo of your ID documents



Verify that your personal information is correct



Complete the identification in video chat with one of our operators

[Start](#)

Why are you asking me for this data?

It is necessary to read and accept the privacy policy.

Privacy

Disclosure statement

I declare that I have read the information notice on the protection of personal data provided by InfoCert S.p.A. pursuant to the GDPR

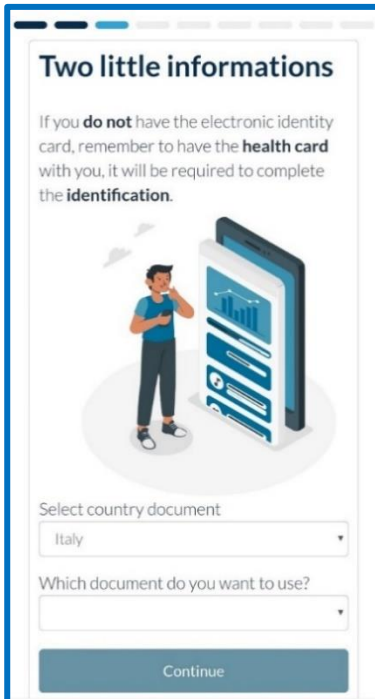
a. I agree to the processing of Data in relation to the sending by the Data Controller of commercial and/or promotional communications relating to own products/services of any kinds or products/services of other companies **(optional consent)**

☐ Yes ☐ No

b. I agree to the communication or transfer of Data to other companies who will use them for

Now is possible to select the type and nationality of the document.
The documents selectable are the follows:

- Paper identity card;
- Electronic identity card;
- Passport.



Two little informations

If you **do not** have the electronic identity card, remember to have the **health card** with you, it will be required to complete the **identification**.

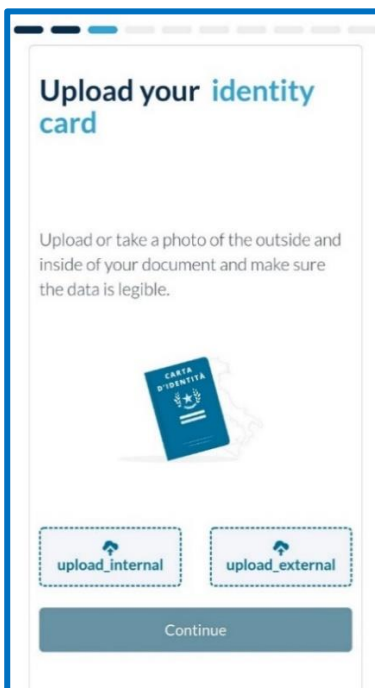
Select country document

Italy

Which document do you want to use?

Continue

Now it is possible to proceed to upload the document.



Upload your identity card

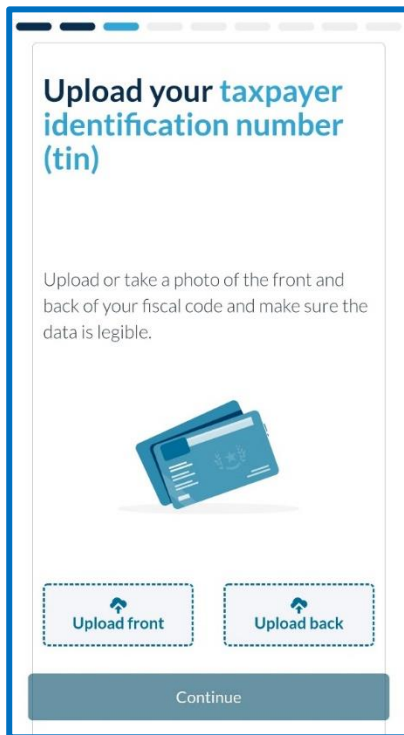
Upload or take a photo of the outside and inside of your document and make sure the data is legible.

CARTA D'IDENTITÀ

upload_internal upload_external


Continue



The following step is to load the health card.




Upload your taxpayer identification number (tin)

Upload or take a photo of the front and back of your fiscal code and make sure the data is legible.



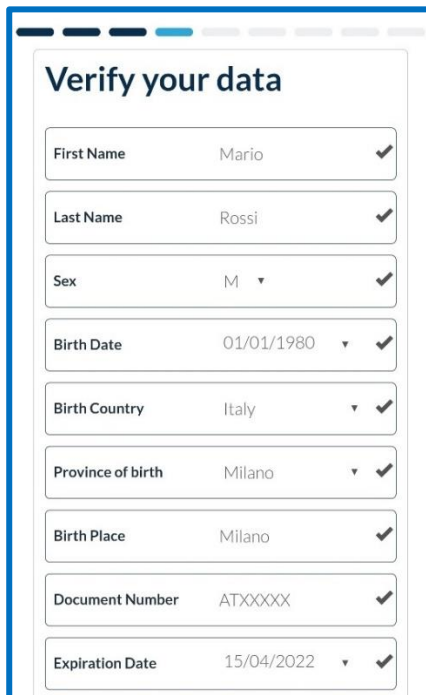
 





If you have chosen as a document to load an electronic identity card you will not be required to upload the health card as the Fiscal Code is already present on the Identity Card.

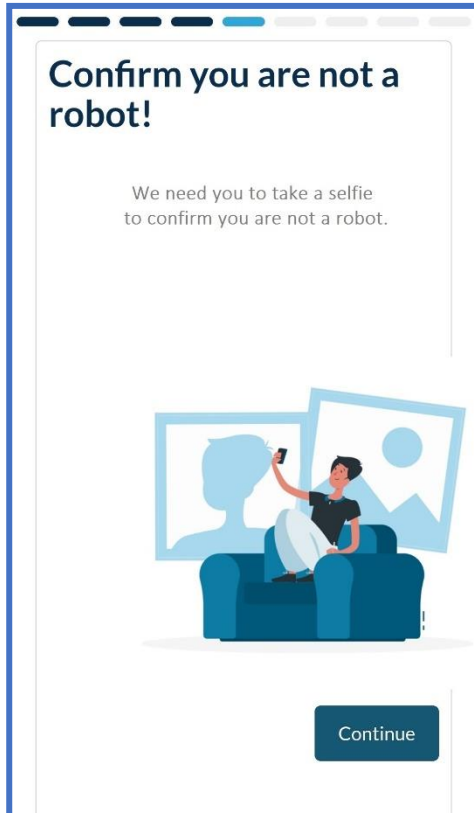
The following step is to check the personal data and edit or validate it.



The screenshot shows a mobile application interface with a blue header bar. Below the header, the title "Verify your data" is displayed in bold. The form consists of ten rows, each with a label, a value, and a checkmark icon. The data entered is as follows:

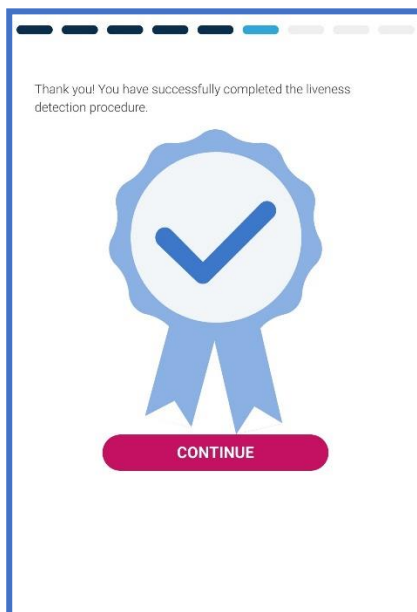
Field	Value	Status
First Name	Mario	✓
Last Name	Rossi	✓
Sex	M	✓
Birth Date	01/01/1980	✓
Birth Country	Italy	✓
Province of birth	Milano	✓
Birth Place	Milano	✓
Document Number	ATXXXXXX	✓
Expiration Date	15/04/2022	✓

In order to confirm not to be a robot, the system will ask to take a selfie.



The screenshot shows a mobile application interface with a blue header bar. Below the header, the title "Confirm you are not a robot!" is displayed in bold. Below the title, the text "We need you to take a selfie to confirm you are not a robot." is shown. Below the text is an illustration of a person sitting on a blue couch, holding a smartphone up to take a selfie. The person is positioned in front of a large, stylized blue frame that contains a silhouette of a person's head and shoulders. At the bottom of the screen, there is a blue button with the text "Continue".

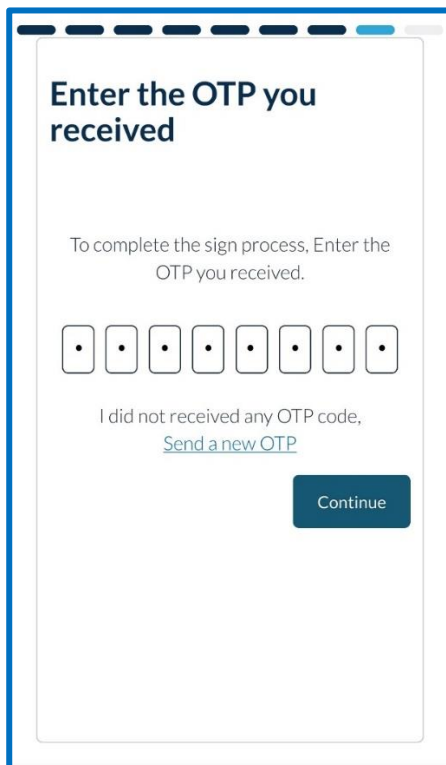
The procedure will be confirmed by the system.



Once the recognition is complete, you will see the certificate request contract.

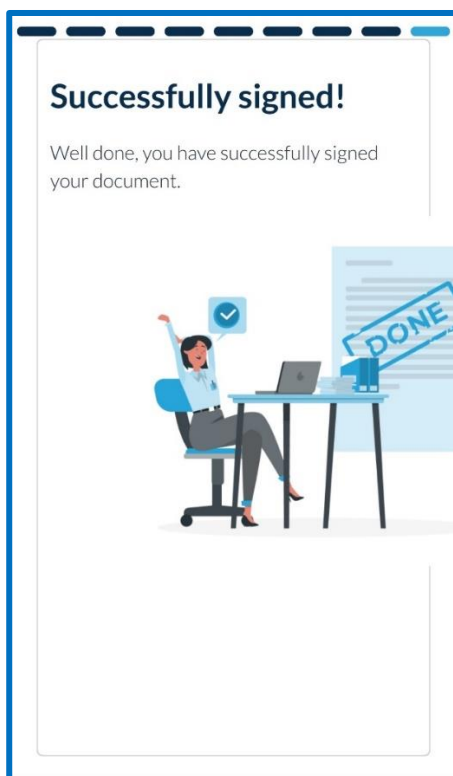


By clicking on *Request the certificate* an SMS will be sent with an OTP code to be entered to proceed to the signature.

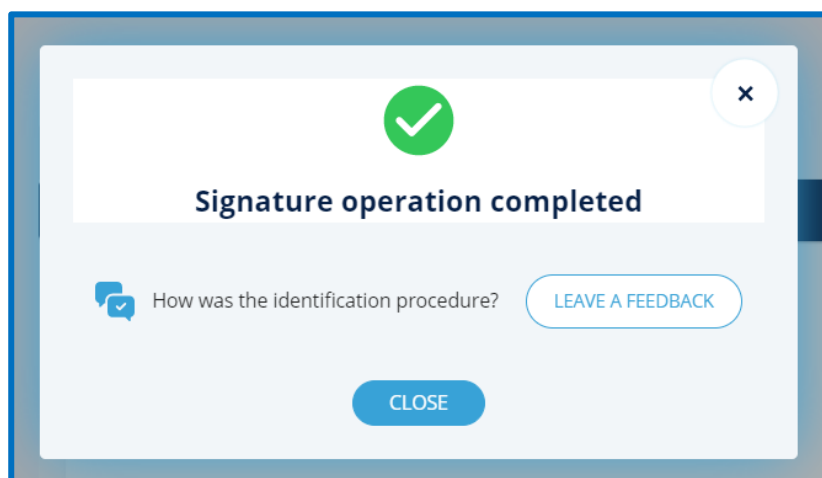


The screenshot shows a mobile application interface for entering an OTP. At the top, the title "Enter the OTP you received" is displayed. Below the title, a message states: "To complete the sign process, Enter the OTP you received." Underneath this message is a row of eight input boxes, each containing a single dot. Below the input boxes, a message reads: "I did not received any OTP code," followed by a blue link that says "Send a new OTP". At the bottom right of the screen is a blue button labeled "Continue".

Once the OTP has been entered, a message on the screen will confirm the operation.



Once the identification process is complete, it will be redirected to GoSign.



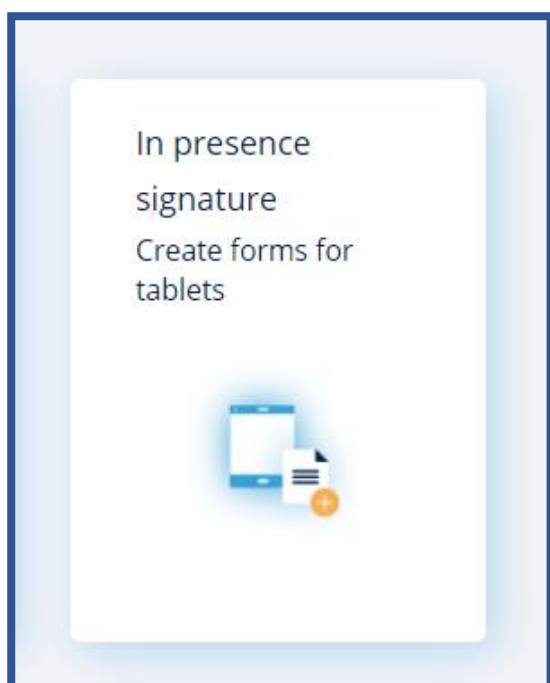
25 IN PRESENCE SIGNATURE

In presence signature function, allows you to configure documents and then be able to sign them with GoSign Grapho (i.e. via tablet device).

25.1 CONFIGURE THE PRACTICE

25.1.1 UPLOAD DOCUMENT

To upload a document, click on the function icon on the home page.



With GoSign Web you have the possibility to upload any type of file (.pdf, .doc, .xls, .jpg, documents in .p7m format) and it is possible to upload multiple documents at the same time.

25.1.2 SETTINGS

Once the document (or documents) has been uploaded, by default is set a dossier number; the deadline or the date by which the practice must be concluded (by clicking on the calendar icon you can set the date) the trash icon allows you to remove the document; the eye icon gives you the possibility to view the loaded document.

The screenshot displays the 'In presence signature' workflow in the GoSign application. The main section is titled 'UPLOAD DOCUMENTS' and shows a document named '1. GOSIGN BUSINESS MOBILE'. A red PDF icon is visible next to the document name. To the right, there are fields for 'Subject *' (containing 'Dossier 05YA7R00Y') and 'Deadline' (with a calendar icon). An 'Urgent dossier' toggle switch is also present. Below these fields is a link for 'OTHER SETTINGS'. The 'ADDITIONAL SETTINGS' section is expanded, showing two options: 'Use' (Choose the privacy level) with a dropdown menu currently set to 'Corporate', and 'Document Class' (Please indicate a specific category for your documents) with a link to 'NONE'. At the bottom of the interface, the dossier and ID numbers are displayed: 'Dossier 05YA7R00Y | ID 05YA7R00Y', and a 'NEXT' button is available.

To add further priority to the dossier, you need to activate the Urgent case box.

By clicking on Additional settings, you change some parameters:

- **Privacy Level:** privacy can be set as CORPORATE ((indicates that the file is for internal use); PUBLIC (which can also be viewed outside the company); CONFIDENTIAL; STRICTLY CONFIDENTIAL;
- **Document Class** (available only for enterprise users): by clicking on "NONE→ SET DOCUMENT CLASS" the enterprise user can choose the type of document class between Customer Offer, RAO, RDA.

25.2 PLACE THE SIGNATURE

The next step is to set the section on the document where the signature will be displayed once the user signs via **GoSign Grapho**.

You can add as many signatures as you want (as needed) and each signature section must contain:

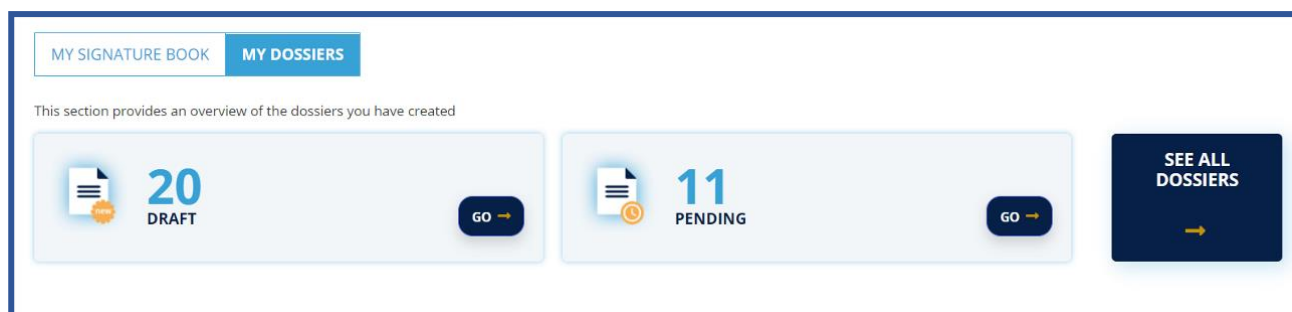
Name and Surname of the person who will have to sign, the email of the person who will have to sign and his / her Tax Code.

The screenshot displays the GoSign Business Mobile web interface. The top navigation bar is blue with the GoSign logo and icons for help, information, and a user profile. A sidebar on the left contains icons for settings, documents, and other functions. The main content area is titled 'In presence signature' and includes a breadcrumb trail: 'ASSIGN THE DOSSIER > PLACE SIGNATURES'. Below this, a message states: 'Click on the signatories to place the signatures you want to request'. A list of signatories is shown, with 'Mario R.' selected and a 'Recipient' button next to it. Below the list, there are input fields for 'Enter first and last name*' and 'Enter e-mail address*', both marked as required. A 'CONFIGURE DATA' link is also present. The bottom of the interface shows the dossier ID 'Dossier 05YA7R00Y | ID 05YA7R00Y' and a 'NEXT' button. The document preview on the right shows the text 'GoSign Business Mobile'.

To conclude the practice, just press NEXT.

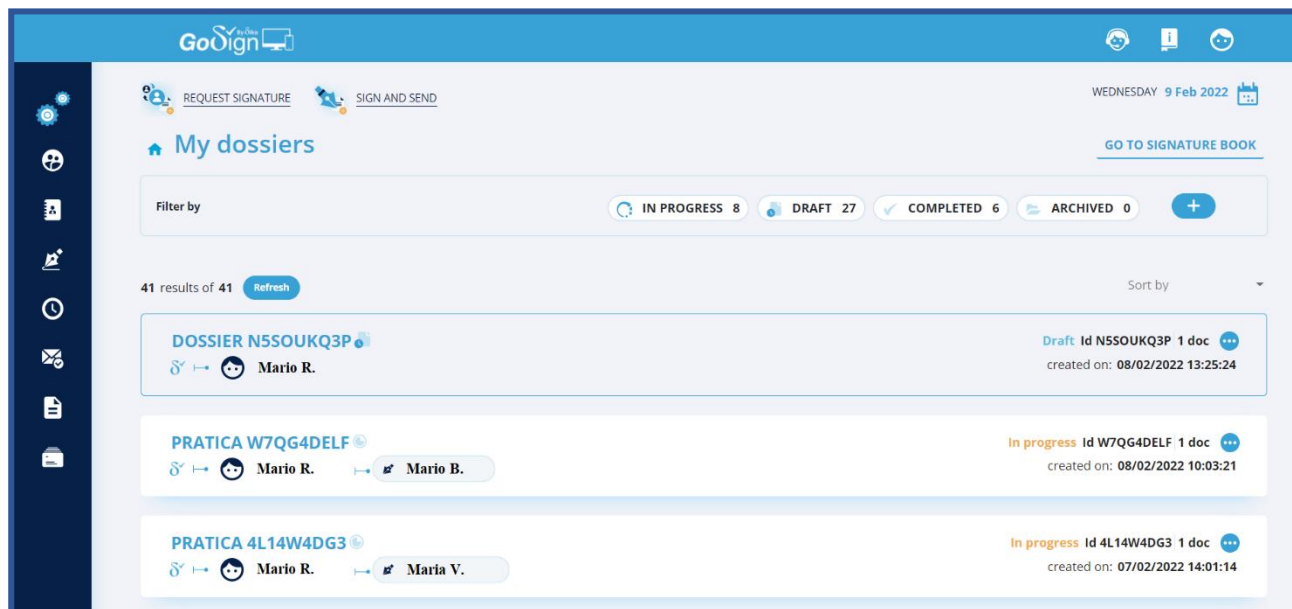
26 MY DOSSIERS SECTION

At the bottom of the screen, it will be displayed the count of the *dossiers that have yet to be approved* and the *dossiers that **have not** yet completed the configuration and submission process*.



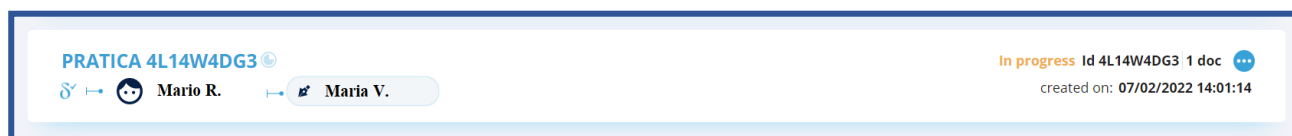
26.1 LIST OF DOSSIERS

By clicking on the section *SEE ALL THE DOSSIER*, it will be shown all the dossiers created by the account. However, if you click on one of the buttons at the top right (*Pending, Draft, Completed, Archived*), you will be redirected to the same screen, with the dossiers already filtered.



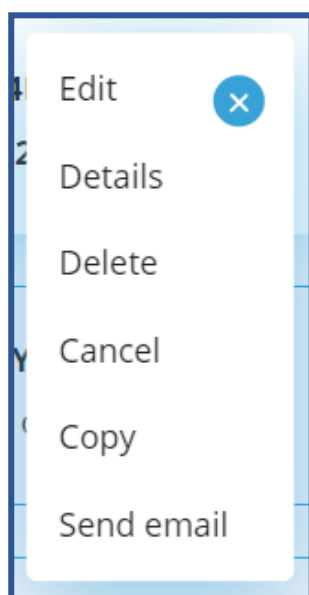
26.1.1 DETAILS

The list of dossiers presents some details, such as the dossier number, how many documents it contains, the date and time of creation, who created the dossier, and who will have to countersign the document, and the progress of the dossier.



26.1.2 ACTIONS ON DOSSIERS

By clicking on the three dots icon, on the right side of each dossier section, a drop-down menu will open and it will indicate all the actions that can be carried out on a dossier:



26.1.2.1 EDIT

Allows you to reconfigure the dossier, it is like retracing the entire path for configuring the dossier.

26.1.2.2 DETAILS

Clicking on *Details* you are redirected to a page where you can see more specifically the practice details. Then you have the possibility to download the document, clicking on the down arrow icon, or view it by clicking on the eye icon. When the practice are going to expire, through the red megaphone icon, a reminder email will be sent to the one who has to countersign the document.

The screenshot displays the GoSign web application interface. At the top, there's a navigation bar with 'REQUEST SIGNATURE' and 'SIGN AND SEND' tabs. The main header shows the dossier ID '4L14W4DG3' and a note 'The dossier contains 1 document'. Below this, a document titled '1. FILEPROVAPDF' is shown with a PDF icon and the text 'Fileprovepdf'. Metadata indicates it's a PDF uploaded by Mario R. on Feb 7, 2022 at 14:01:14. A 'DOSSIER PROGRESS' section shows 'In progress' status. A table lists the assigned signatories: Mario R. (Order 1) and Maria V. (Order 2). The table columns are ORDER, ASSIGNED TO, START DATE, END DATE, ACTION, SIGNATURE TYPE, and STATUS. The status for Maria V. is 'In progress'. At the bottom, upload details show it was uploaded by Mario R. on 07/02/2022 at 14:01:14, with a role of 'Nobody' and corporate use. The time since creation is 2.93 days, and the loading method is 'Web'.

26.1.2.3 DELETE

With this action the dossier is permanently deleted and removed from the list. Before permanently deleting the dossier, you are asked to confirm the action via a popup.

26.1.2.4 CANCEL

This allows you to cancel the current dossier. Before canceling it permanently, you are asked to confirm the action via a popup.

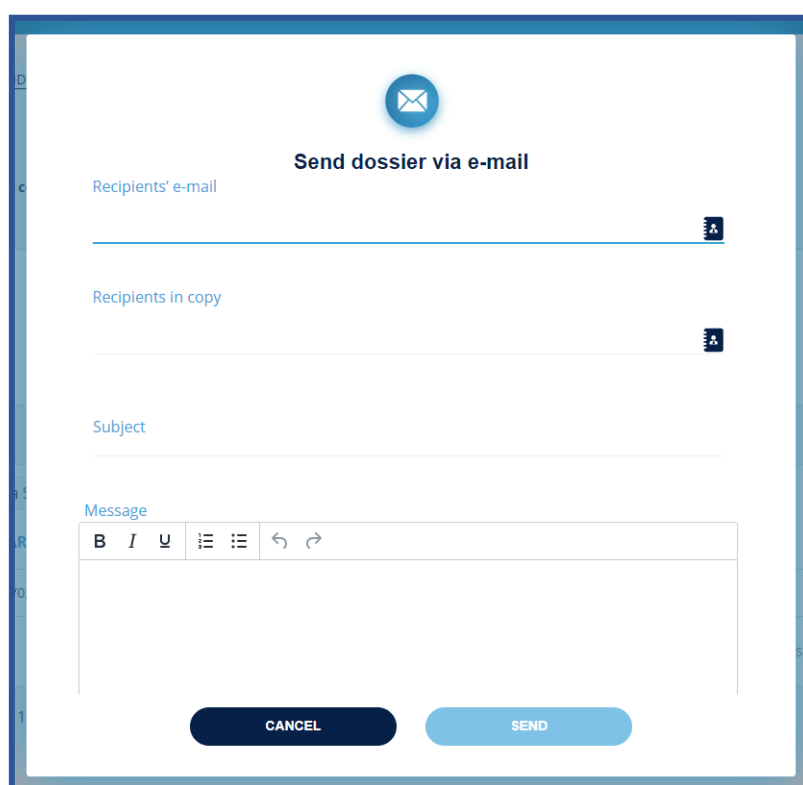
26.1.2.5 COPY

With this action, a copy of the dossier is created; once the copy has been created, you will be redirected to the dossier configuration screen. The copy will have the same ID as the original dossier, but it differs from the original one as there is a copy icon.

26.1.2.6 SEND EMAIL

with this action, the dossier is sent and via email. A pop-up window will open in which it will be possible to select the recipient, any co-recipients, the subject, and the body of the message.

Once the email has been completed, to send it, press the SEND button.



The screenshot shows a pop-up window titled "Send dossier via e-mail" with an envelope icon. It contains the following fields and controls:

- Recipients' e-mail:** A text input field with a small icon on the right.
- Recipients in copy:** A text input field with a small icon on the right.
- Subject:** A text input field.
- Message:** A rich text editor area with a toolbar containing buttons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, and Link/Unlink icons.
- Buttons:** "CANCEL" (dark blue) and "SEND" (light blue) buttons at the bottom.

26.1.3 SEARCH AND FILTERS

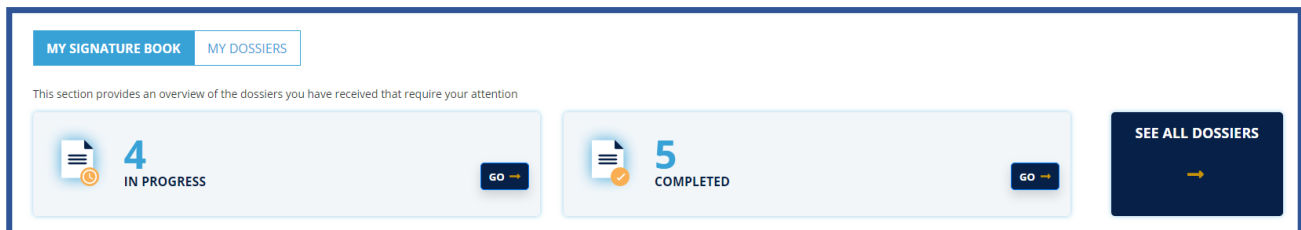
The research of the dossiers can be done by applying different filters such as Subject of the dossier, the code of dossier, the time interval in which the practices were created or even those who will have to approve the practice.

Once the various filters have been selected, to apply the search, press the APPLY button.

The screenshot shows a search and filter interface. At the top, there is a 'Filter by' section with four tabs: 'IN PROGRESS' (8), 'DRAFT' (27), 'COMPLETED' (6), and 'ARCHIVED' (0). Below this, there are three filter categories: 'Subject', 'Creation date', and 'Recipient'. The 'Subject' filter has a text input field and a dropdown menu with 'ID' and 'External ID' options. The 'Creation date' filter has 'from' and 'to' date pickers. The 'Recipient' filter has a text input field with the placeholder 'recipient'. At the bottom, there are two buttons: 'RESET FILTERS' and 'APPLY'.

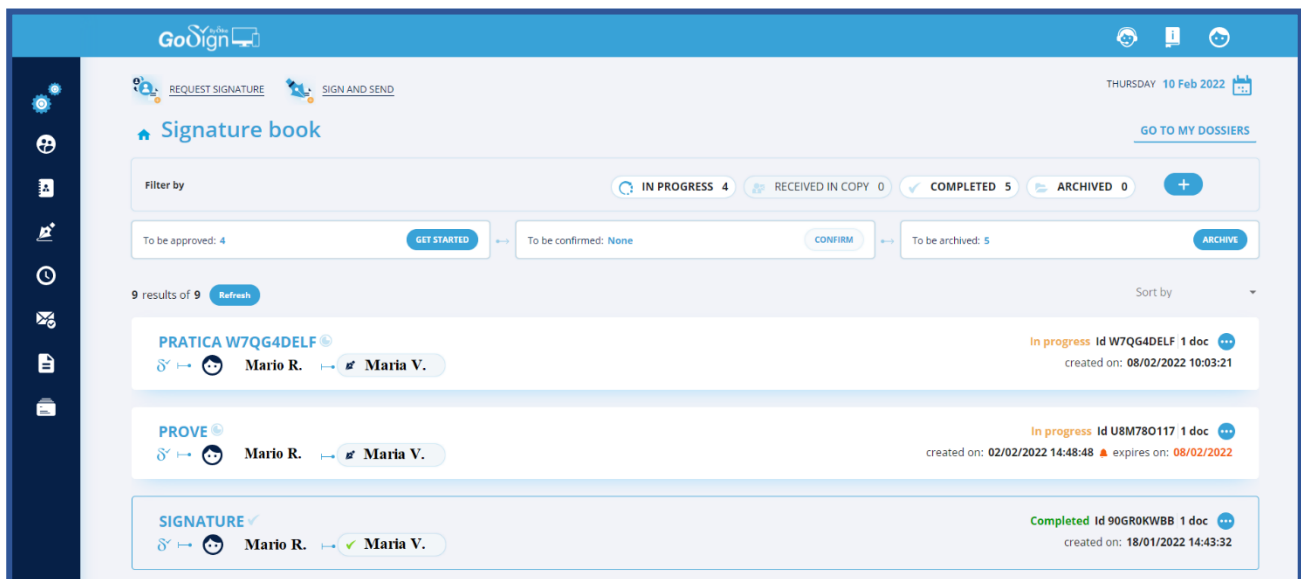
27 MY SIGNATURE BOOK

The count of signed documents that have yet to be completed and the documents that have completed the signing process are displayed at the bottom of the screen.



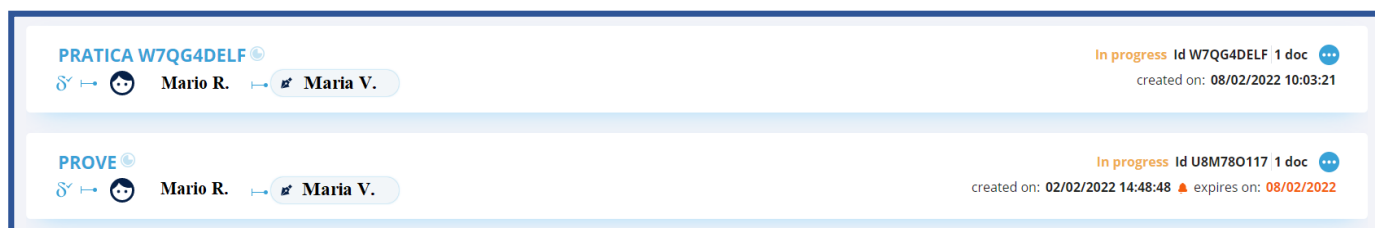
27.1 LIST OF DOSSIER

By clicking on the SEE ALL DOSSIERS section, the new SIGNATURE BOOK screen will show in full all the signature processes created by the account. However, if you click on one of the buttons at the top left, you will be redirected to the same screen but with the documents already filtered showing only the documents that have yet to complete the signing process or those already completed.



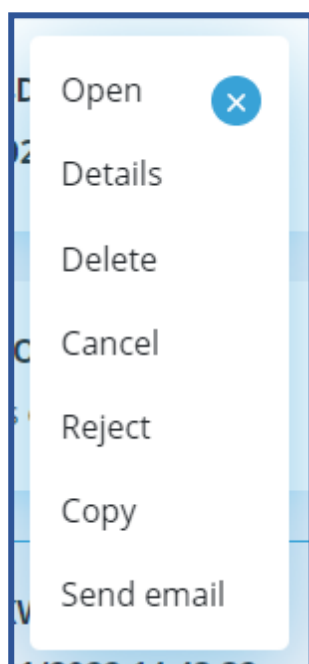
27.1.1 DETAILS

The list of signature files shows the details of the case such as the dossier number, how many documents it contains, the date and time of creation, who created the dossier and who signed the document, and the progress of the dossier.



27.1.2 ACTIONS ON PRACTICES

By clicking on the three dots icon on the right side of each dossier section, a drop-down menu will open that will indicate all the actions that can be carried out on a dossier:



27.1.2.1 OPEN

Allows you to reconfigure the dossier, it is like retracing the entire path for configuring the dossier.

27.1.2.2 DETAILS

You are redirected to a page in which the details concerning the dossier are shown more clearly, with the possibility of downloading the document by clicking on the download icon (down arrow), or viewing the document by clicking on the icon eye. If the deadline for the practice is approaching, via the red megaphone icon, a reminder email will be sent to the person who must countersign the document.

GoDign

REQUEST SIGNATURE SIGN AND SEND

THURSDAY 10 Feb 2022

OPEN

< Pratica W7QG4DELF

ID: W7QG4DELF The dossier contains 1 document [Download all](#)

1. FILEPROVA

fileprove

Type: Microsoft Word
 Uploaded by: Mario R.
 on: Feb 8, 2022 at: 10:03:21

Document 1/1

DOSSIER PROGRESS **in progress**

Mario R. Maria V.

ORDER	ASSIGNED TO	START DATE	END DATE	ACTION	SIGNATURE TYPE	STATUS
1	Maria V.	08/02/2022 10:04:23	-	1 2	Qualified (PDF)	In progress

Results per page 10 1 - 1 of 1

Uploaded by: Mario R. on: 08/02/2022 At: 10:03:21
 Uploaded by role: Nobody
 Use: Corporate

Time since creation date: 2.13 days
 Loading method: Web

27.1.2.3 DELETE

With this action the dossier is permanently deleted and removed from the list. Before permanently deleting the dossier, you are asked to confirm the action via a popup.

27.1.2.4 CANCEL

Allows you to cancel the current case. Before canceling it permanently, you are asked to confirm the action via a popup.

27.1.2.5 REJECT

Allows you to reject the practice.

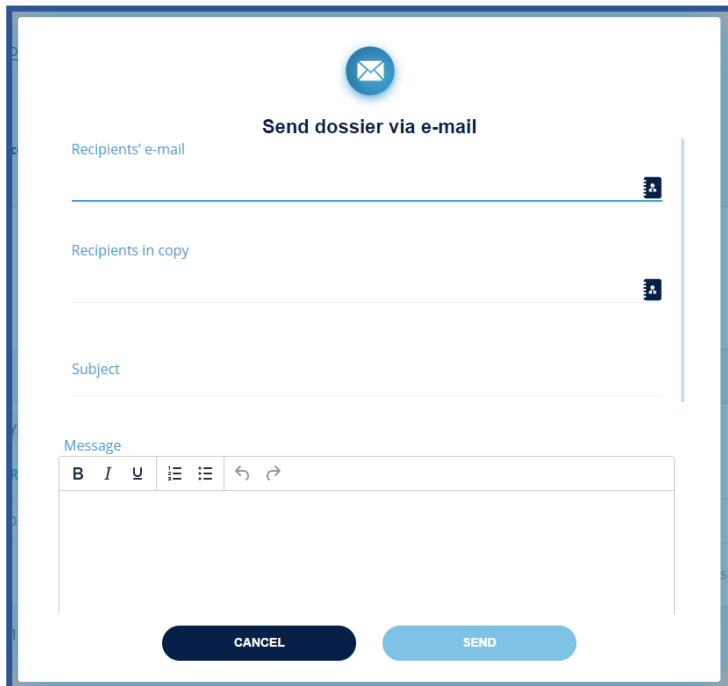
27.1.2.6 COPY

With this action, a copy of the dossier is created; once the copy has been created, you will be redirected to the case configuration screen. The copy will have the same ID as the original dossier, but it differs from the original one as there is a copy icon.

27.1.2.7 SEND EMAIL

With this action the dossier is sent and via email. A pop-up window will open in which it will be possible to select the recipient, any co-recipients, the subject and any part of the message.

Once you have completed the email to send it you have to press the SEND button.



The screenshot shows a pop-up window titled "Send dossier via e-mail" with an envelope icon. It contains the following fields and controls:

- Recipients' e-mail:** A text input field with a user selection icon on the right.
- Recipients in copy:** A text input field with a user selection icon on the right.
- Subject:** A text input field.
- Message:** A rich text editor with a toolbar containing Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Undo, and Redo icons.
- Buttons:** "CANCEL" (dark blue) and "SEND" (light blue) buttons at the bottom.

27.1.3 SEARCH AND FILTERS

The research of the dossiers can be done by applying different filters such as Subject, the time interval in which the practices were created or even those who will have to approve the practice.

Once the various filters have been selected, to apply the search, press the APPLY button.

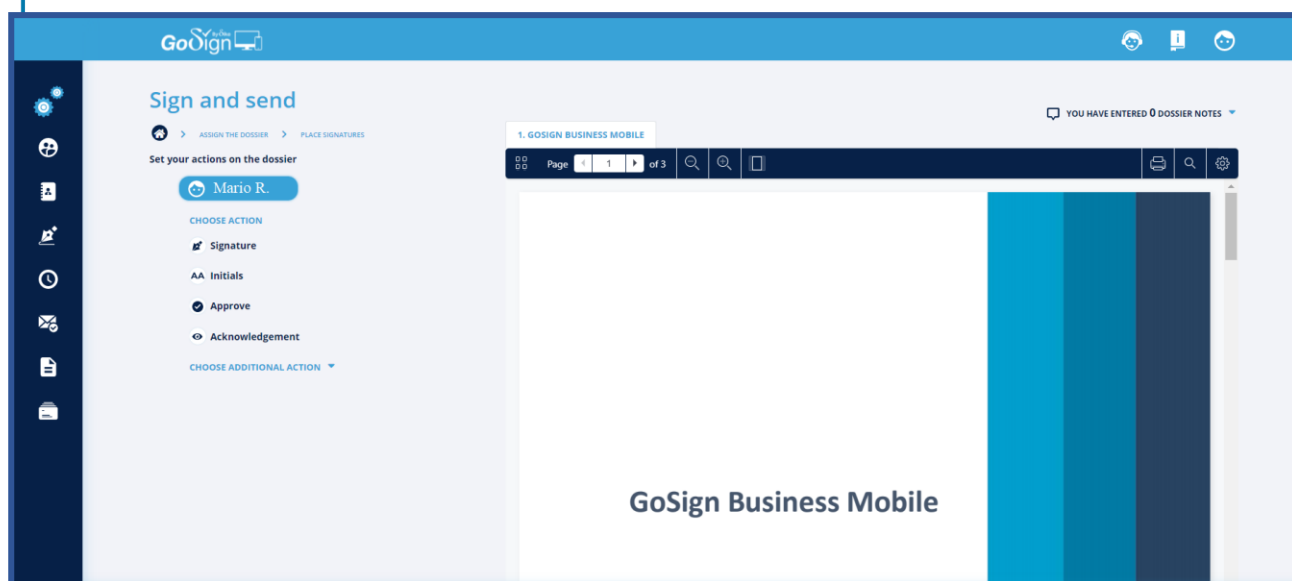
27.2 SIGNATURE OF THE PRACTICES

Four types of signatures are possible, however only two of these have legal value.

27.2.1 SIMPLE SIGNATURE

The Simple Signature is the simplest method that can be implemented but it must be remembered that it has no legal value.

Once the recipients have been chosen, clicking on the SEND button will display the preview page of the document on which it will be sufficient to choose from the available actions. Once all the necessary actions have been completed, the procedure can be concluded by clicking on the NEXT button.

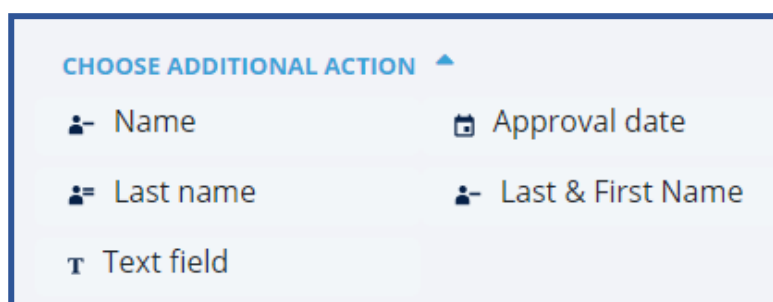


The possible actions are:

- *Signature*: clicking on the preview of the document will place an icon on the preview and it will be possible to set whether or not you want to make the signature visible on the document.
- *Initials*: clicking on the preview of the document will place an icon on the preview and it will be possible to set whether or not you want to make the signature visible on the document;
- *Approve*: clicking on the preview of the document will place an icon on the preview. This icon allows you to indicate that the document has been approved by the user who is sending the case.
- *Acknowledgement*: clicking on it you can choose if the acknowledgement has to be visible on the file or not.

27.2.1.1 ADDITIONAL ACTIONS

You can add more informations if you consider it useful for the clarity of the signature.



Once you have clicked on NEXT you will be asked to confirm the type of signature previously chosen (in this case it will only be possible to confirm the simple signature). The signing process will be concluded and then added to the list of completed signature files by clicking on the NEXT button.

27.2.2 QUALIFIED ELECTRONIC SIGNATURE

The qualified electronic signature is the method of signing with legal value. It can be done in two ways: by means of a signature device or with a remote signature certificate. **GoSign Web** allows this type of signature if we decide to sign with the type of digital signature pdf or with digital signature p7m.

27.2.3 QUALIFIED SIGNATURE (PDF)

Once the recipients have been chosen, clicking on the SEND button will display the preview page of the document on which it will be sufficient to choose one of any action. Once all the necessary actions have been completed, the procedure can be concluded by clicking on the NEXT button. The possible actions in this case are:

- *Signature*: clicking on the preview of the document will place an icon on the preview and it will be possible to set whether or not you want to make the signature visible on the document;
- *Initials*: clicking on the document preview will place an icon on the preview and it will be possible to set whether or not you want to make the signature visible on the document;
- *Approve*: clicking on the preview of the document will place an icon on it. This icon allows you to indicate that the document has been approved by the user who is sending the case.
- *Acknowledgement*: clicking on it you can choose if the acknowledgement has to be visible on the file or not.

27.2.4 QUALIFIED SIGNATURE (P7M)

Once the recipients have been chosen, clicking on the SEND button will display the preview page of the document on which it will be sufficient to choose one of any action. Once all the necessary actions have been completed, the procedure can be concluded by clicking on the NEXT button.

The actions available in this case are three: Sign, Approve and Seen.

A QUALIFIED (P7M) SIGNATURE HAS BEEN REQUESTED

✓ Signature with Device

Remote signature

Once you have chosen the type of signature to continue, click on the NEXT button.

If you have decided for Remote Signature, you will receive a notification on your mobile phone relating to the GoSign Free App to authorize the signature (by entering the remote signature Pin and the code received via SMS, while with the Device Signature, you will need to make sure that the device is correctly connected to the terminal and you will be redirected to the application to authorize the signature by entering the PIN.

27.2.5 WITH CERTIFICATE P12

Once the recipients have been chosen, clicking on the SEND button will display the document preview page, on which it will be sufficient to choose any action. Once all the necessary actions have been completed, the procedure can be concluded by clicking on the NEXT button

The possible actions are:

- *Signature*: clicking on the preview of the document will place an icon on the preview and it will be possible to set whether or not you want to make the signature visible on the document. You can also add additional information such as the Title, Organization, Company, Title or Organization or Company or the date of the transaction and if you want the signature to be visible on the document;
- *Initials*: by clicking on the preview of the document an icon will be placed and it will be possible to set whether or not you want to make the signature visible on the document;
- *Approve*: clicking on the preview of the document will place an icon; this icon allows you to indicate that the document has been approved by the user who is sending the case.
- *Acknowledgement*: clicking on it you can choose if the acknowledgement has to be visible on the file or not.

27.2.5.1 ADDITIONAL ACTIONS

You can add more information if you consider it useful for the clarity of the signature.

CHOOSE ADDITIONAL ACTION ▲

👤 Name	📅 Approval date
👤 Last name	👤 Last & First Name
📄 Text field	

Once you have clicked on NEXT you will be asked to choose the type of electronic signature you want to use. With this option you can sign in two ways:

- *Sign with GoSign Desktop*: By choosing this type of signature, simply click on NEXT to complete the signature process;

A ADVANCED ELECTRONIC WITH CERTIFICATE SIGNATURE HAS BEEN REQUESTED

✓ Sign with GoSign Desktop ⓘ

Signature with Certificate ⓘ

- *Signing with Certificate*: With signing with Certificate, if it has not yet been configured, you will be prompted to perform the configuration. Once the certificate has been activated, to complete the signing process, simply click on the NEXT button.

With P12 certificate

Enter P12 certificate [BROWSE](#)

Certificate password *

ADD

STATUS: INACTIVE

[BUY REMOTE SIGNATURE](#)