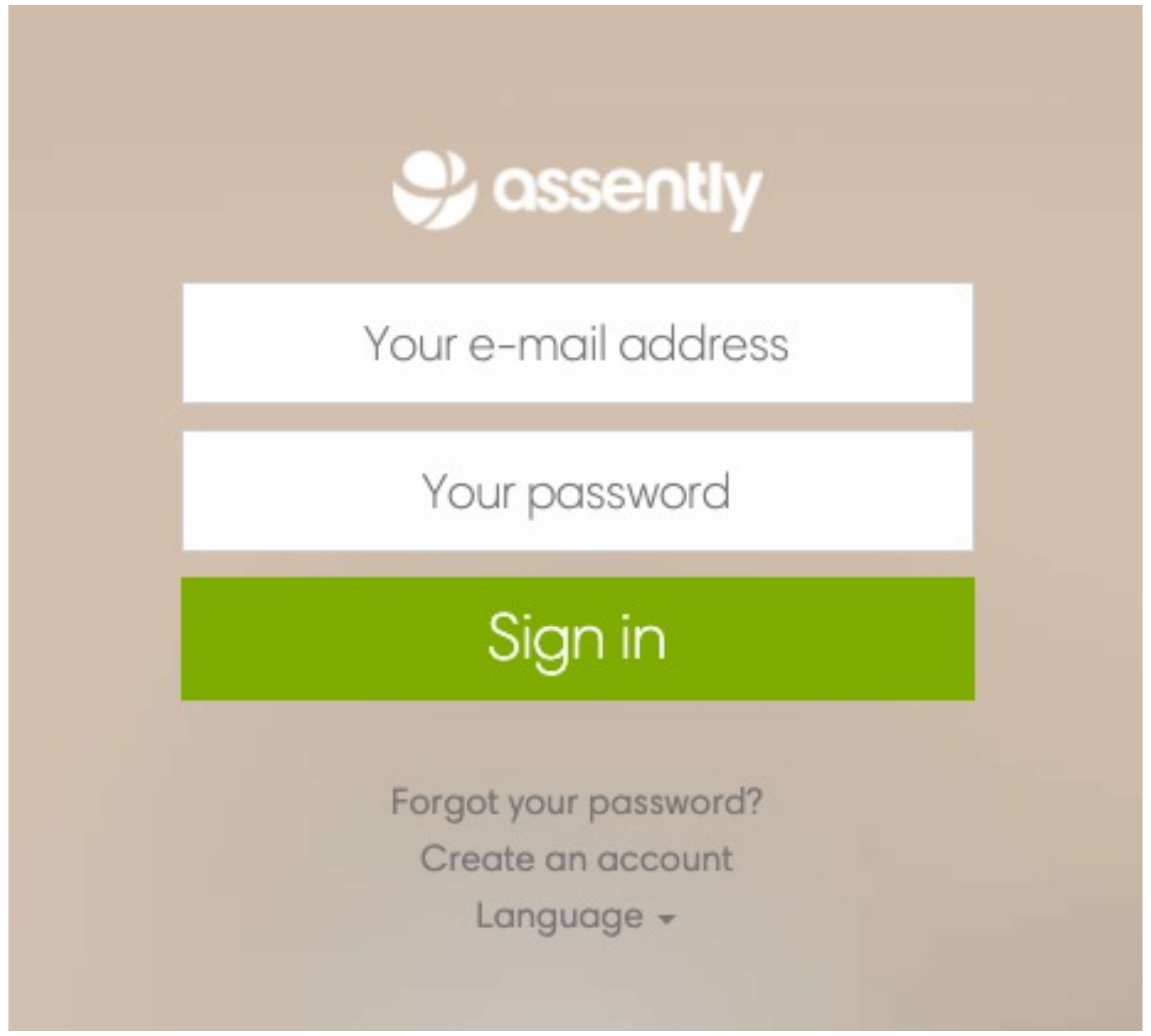
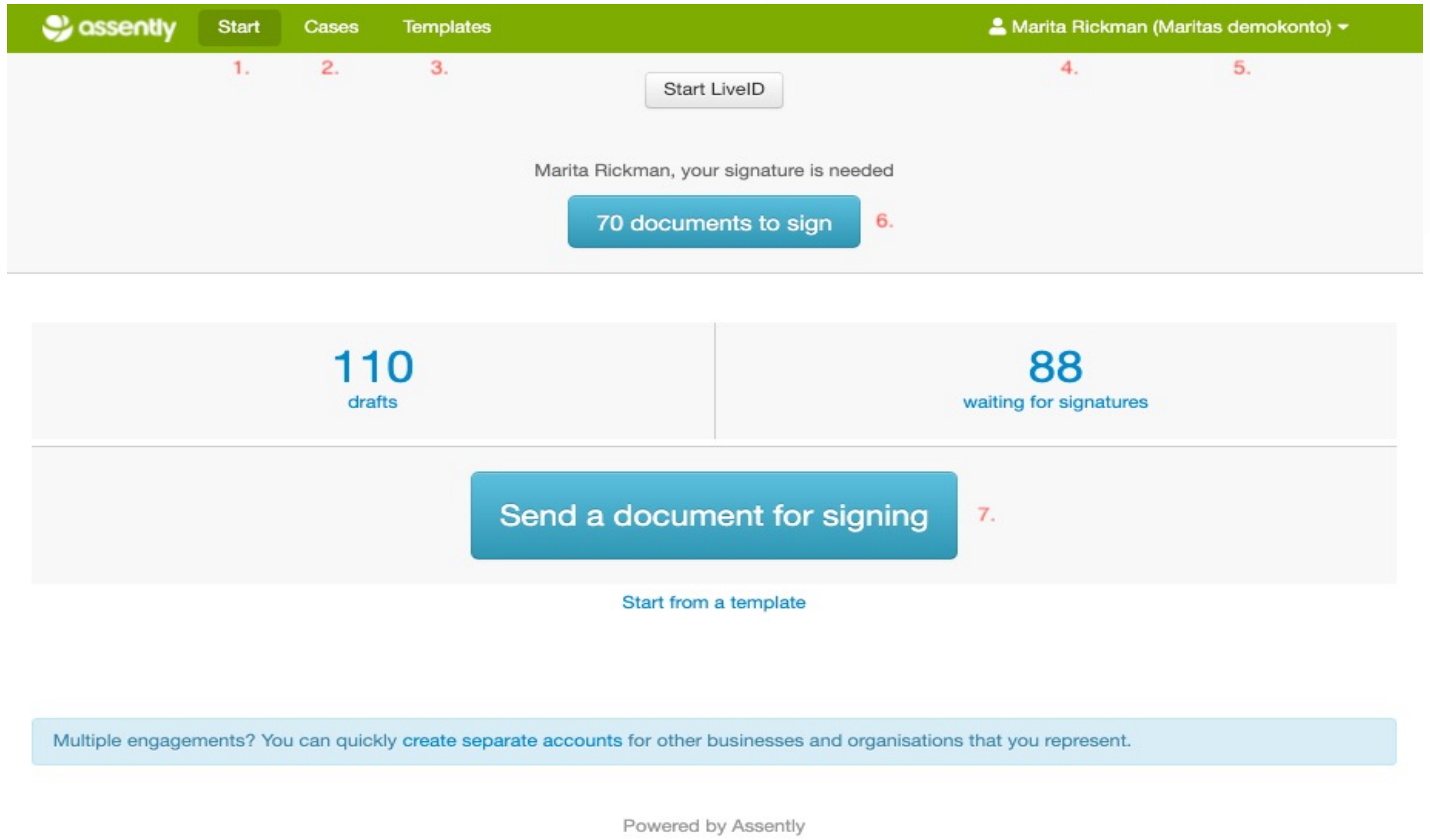
Get started with Assently

Log in to Assently:

Go to: app.assently.com

Enter your email and password. If you don’t remember your password, click *Forgot your password?* to restore it.





Start page

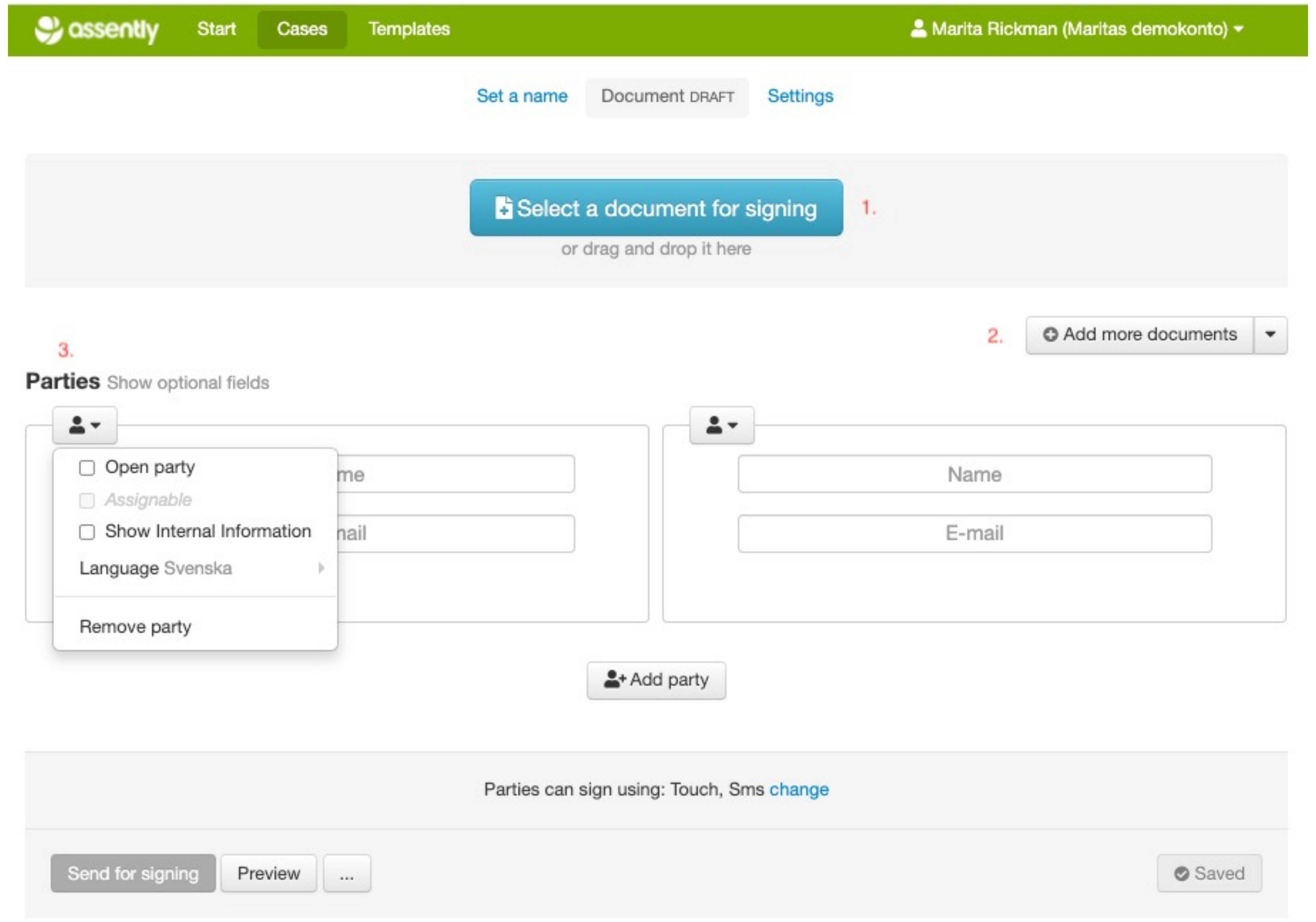
When you log in to Assently you will get to a start page.

1. ***Start.*** You can always press here to get back to the start page, this page.
2. ***Cases.*** Click here if you want to get to the Case Archive, that is, all cases.
3. ***Templates***. Click here to access all available templates.
4. Your name is displayed here.
5. The name of your account within () is displayed here
6. If your signature is expected on several cases, you can click here to get a summary and sign all documents.
7. ***Send a document for signature***, this button is used to send a case from the default template. This is the most common way to send a message.

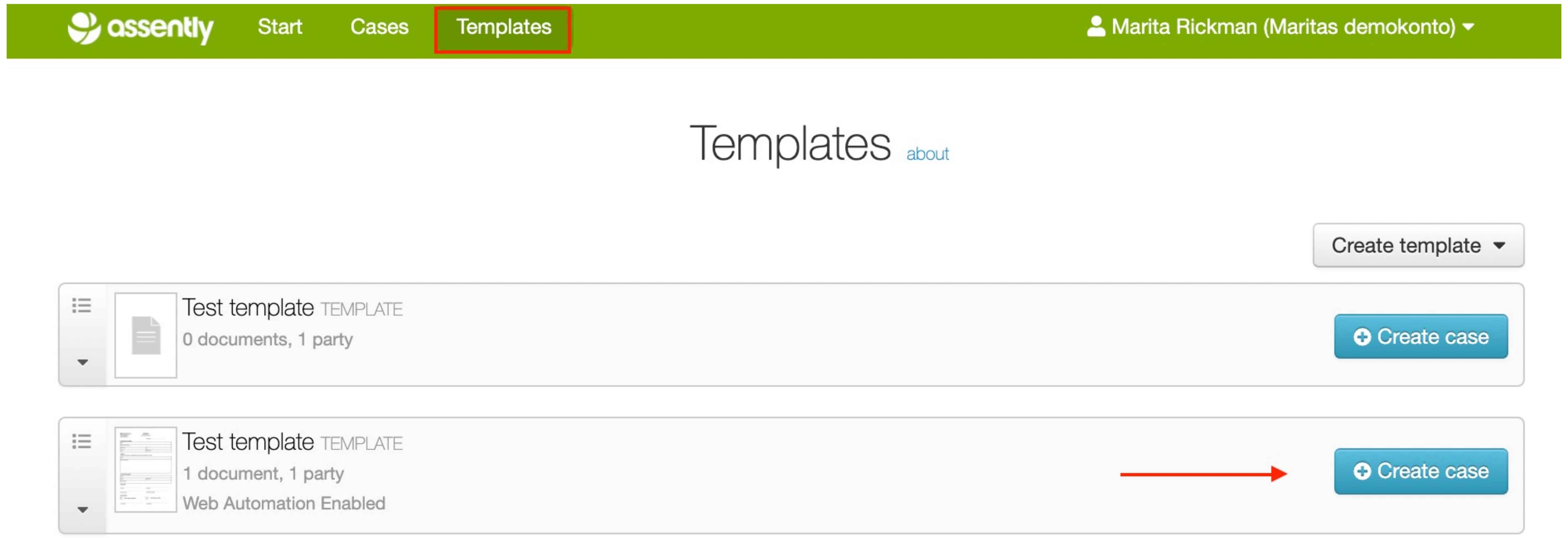
Send a case

A. **Send a case from the start page**. Press the blue button at the start page.

1. Upload the document you want to send out.
2. To add more documents, select it here.
3. Decide how many parties will sign the document. If only one person will sign, you must delete a party. Otherwise, the ***Send for signing*** - button will not be green and the case will not be able to send out. If you want more people to sign the document, select ***Add a party***. You can add as many parties as you want.

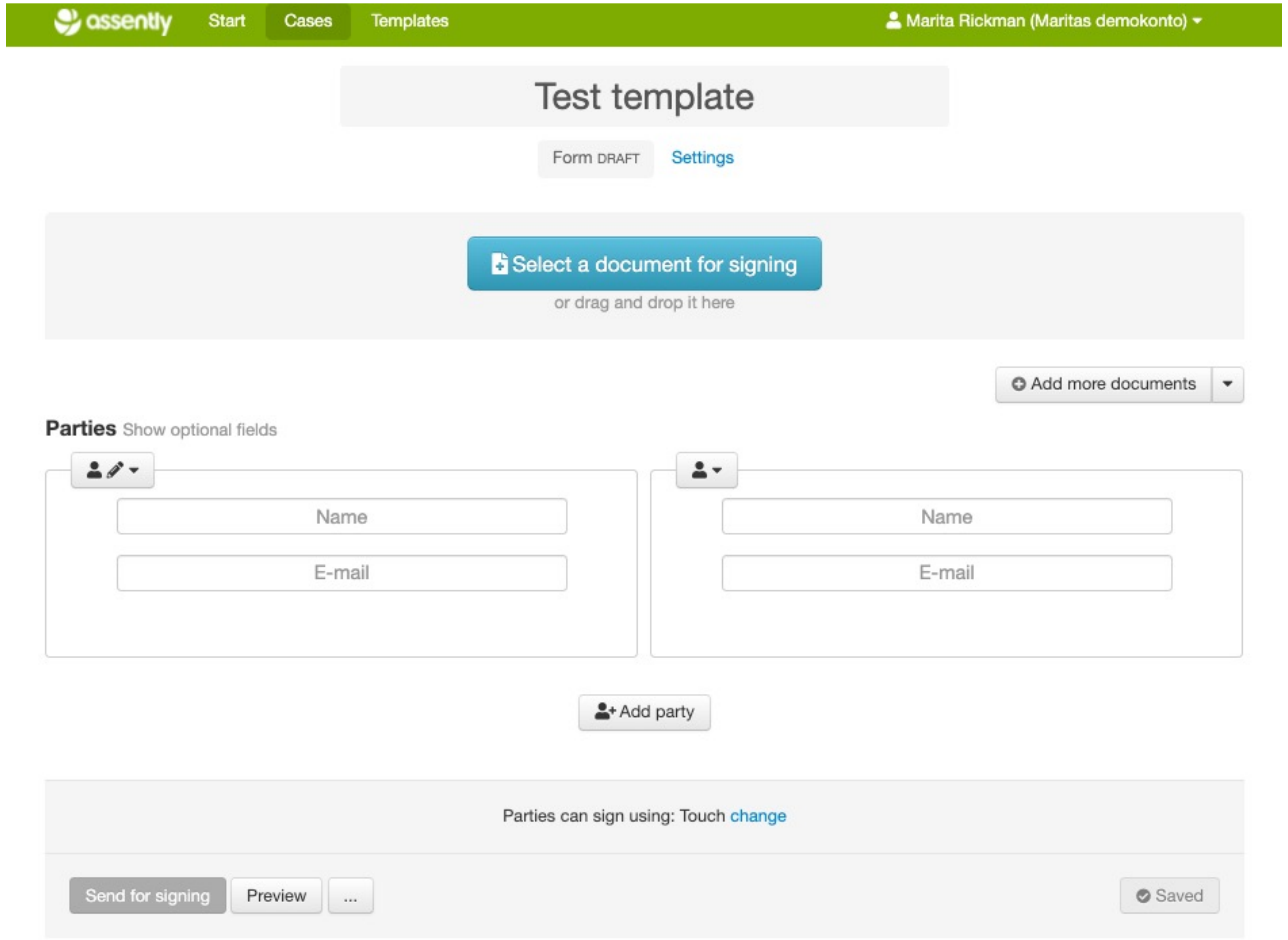


B. ***Send a case from a template.*** Press Templates, select template and press ***Create Case***



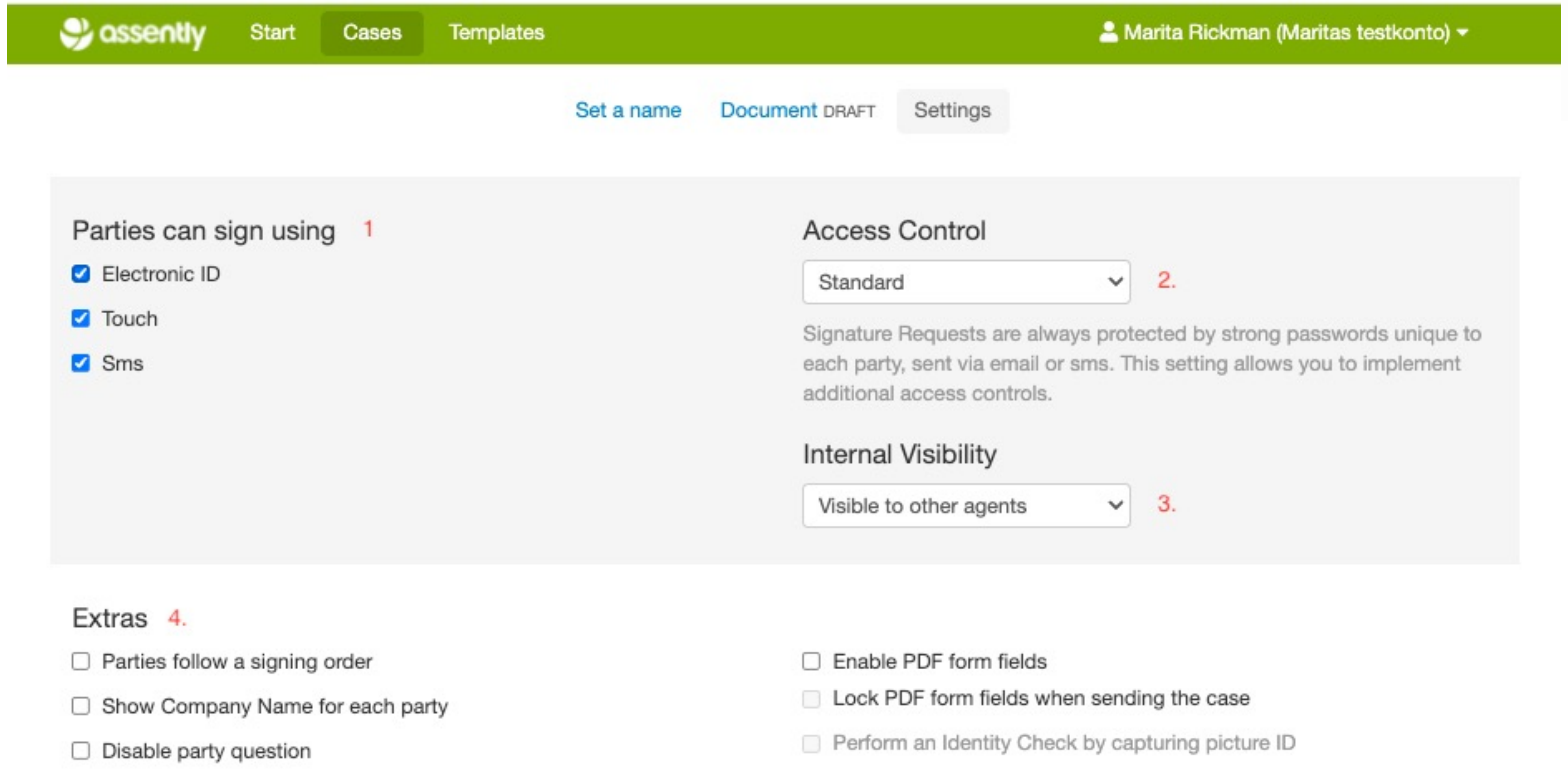
Send a case

You then end up on the case page, see alternative A. The only difference is that the case is already named after the template.



Case settings

1. ***Parties can sign using***. Here you choose which method or methods the parties should be able to sign with. E-identification (Bankid), Touch screen and SMS. You can allow those who are to sign the case to use different signing methods; e-identification, SMS and touch screen signature. However, you cannot control which method a certain person should sign with.
Depending on which of the methods are allowed in the case, different methods are shown:



- If e-identification is allowed, in combination with both or one of the other options, the e-identification option is always displayed first.
- If touch screen + SMS is allowed, the SMS option is only displayed if the case is opened on a device without a touch screen, and the touch screen option if the case is opened on a device with a touch screen.

2. With ***Access Control,*** it is possible to ensure that only the right person can open the agreement, by allowing the person to identify themselves with e-identification or verify their identity via text message, before they have access to the document to be signed. You need to enter the social security number or mobile number of the people who will sign.

3. ***Visibility*** means that you make a case private so that some agents cannot see the case. For example, not all agents in your account should be able to read all agreements. The default setting is that all templates and cases are visible to all agents in the account. ***Administrators*** also see other agents' private templates and cases, while *IsolatedAgent* cannot see anyone else's cases, regardless of visibility of cases and templates.

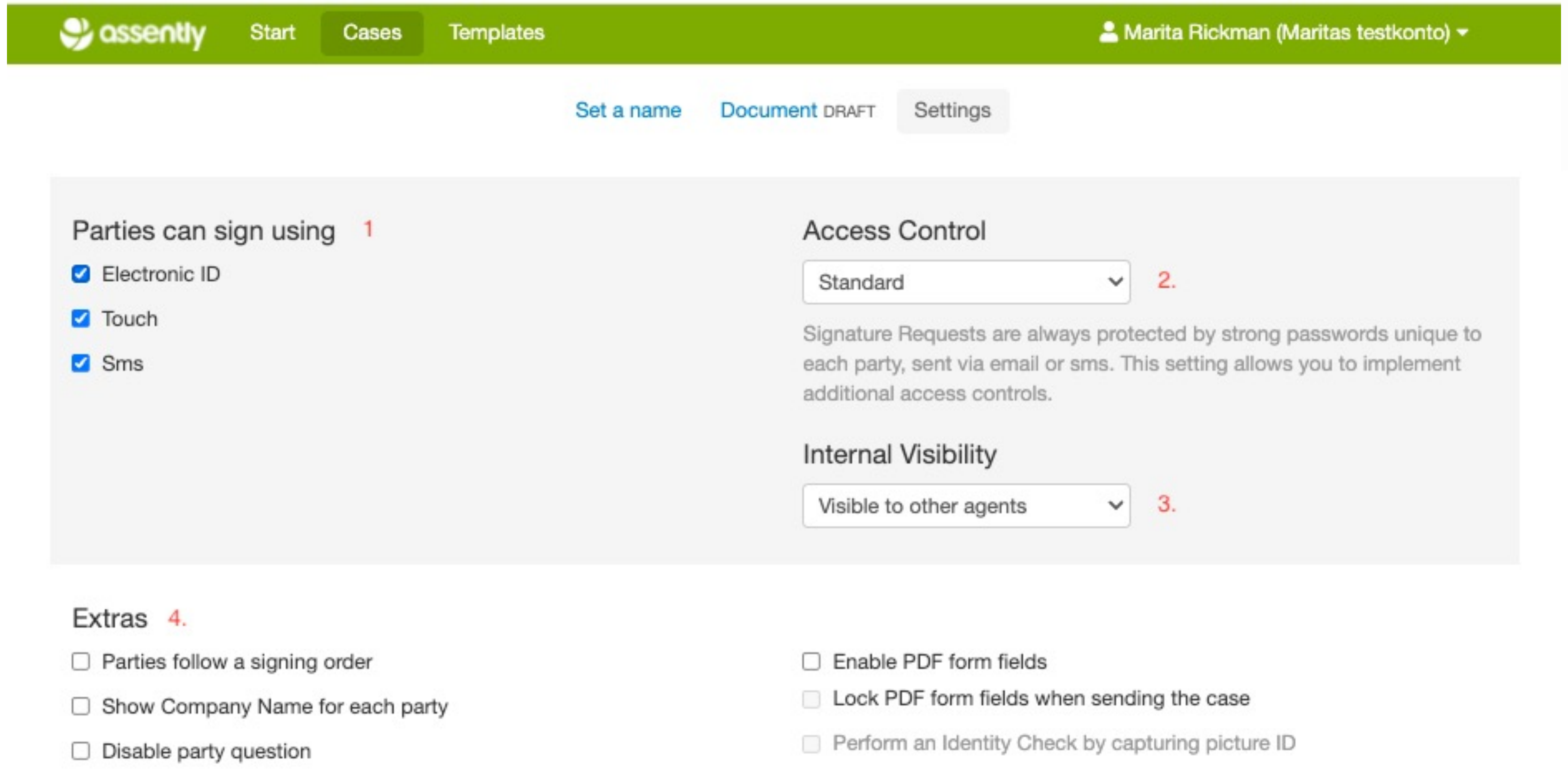
Case settings

4. Extras:

a) *Parties follow a signing order*. With the function activated, the signing order is displayed with a number where party 1 signs first. To control the signing order, open the settings menu for a party and choose whether the person should sign earlier or later.

b) *Show Company Name for each party*. If you want the company name to be visible, you must activate Company name specified for the parties in the settings for the case. This free text field can also be used for other purposes such as position etc.

c) *Disable party question*. If a party has a question regarding the case that has been sent out, he or she can choose to ask a question before signing, which is sent to the administrator. If this box is checked, the parties can NOT ask any questions.



d) *Enable PDF form fields.* If you are going to send out a case where the parties should be able to fill in fields, a pdf with fillable fields must be created in any pdf editor BEFORE it is uploaded in Assently. When you have uploaded the document, this box must also be checked in order for the fields to be fillable.

e) *Lock PDF form fields when sending the case*. If you as an agent only want to be able to fill in the field but not the party, you tick this box. This means that you can fill in the fields that are needed, but when you send out the case, the fields are locked so that the parties can NOT fill in the fields.

Case settings

5. Messages:

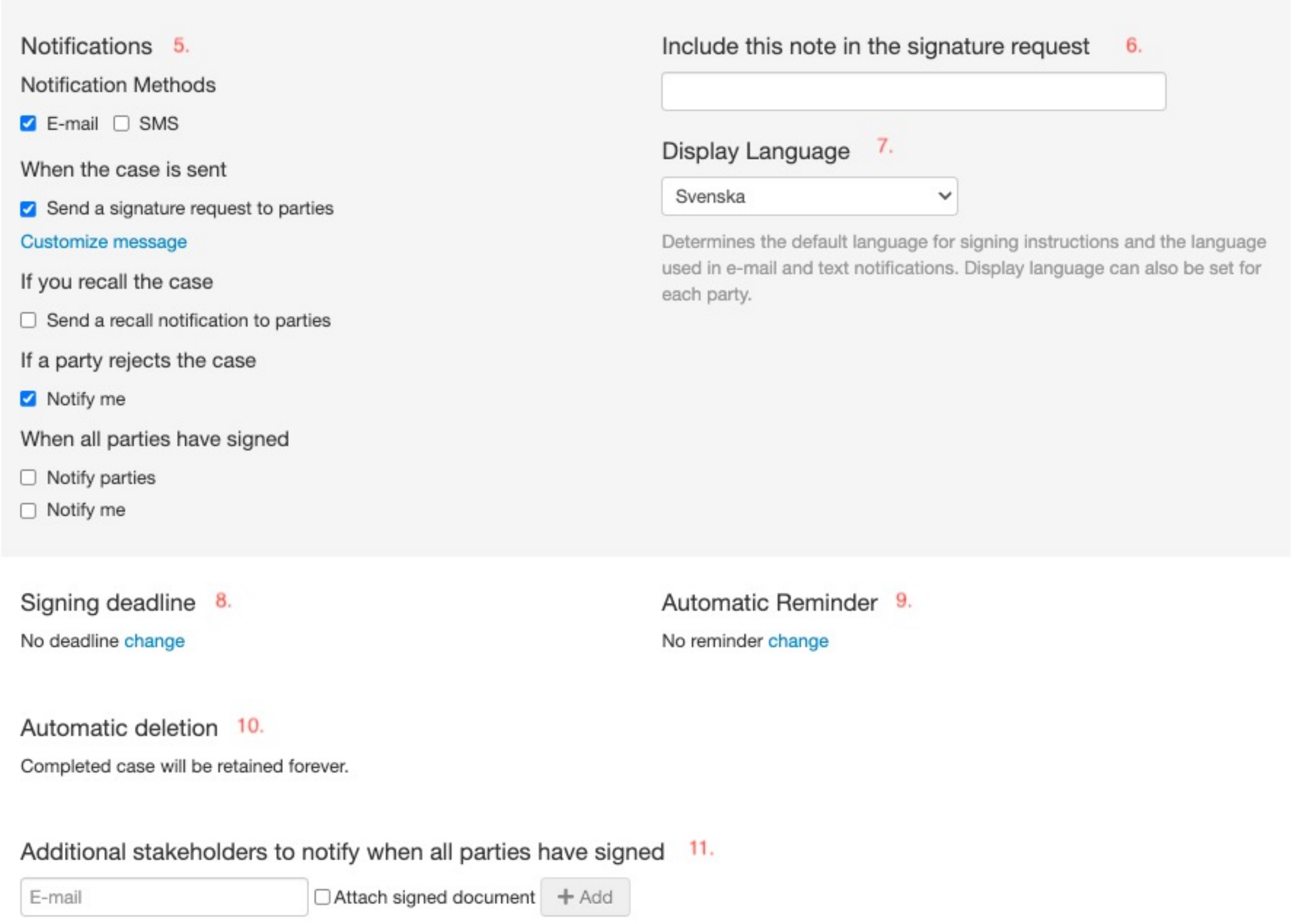
a) ***Notification methods.*** Here you choose whether you want to send the case to the parties via E-mail, SMS or both.

b) ***When a case is sent***. Send invitation to sign to the parties. If you want the invitation to be sent out, this box must be checked. You can customize the message before sending it. You can read more about it here: https://support.assently.com/hc/sv/articles/204869875

c) ***If you recall a case.*** Send notice of recalling to the parties. If you need to make a change in a sent case and have to recall it, a message will be sent to the parties if this box is checked.

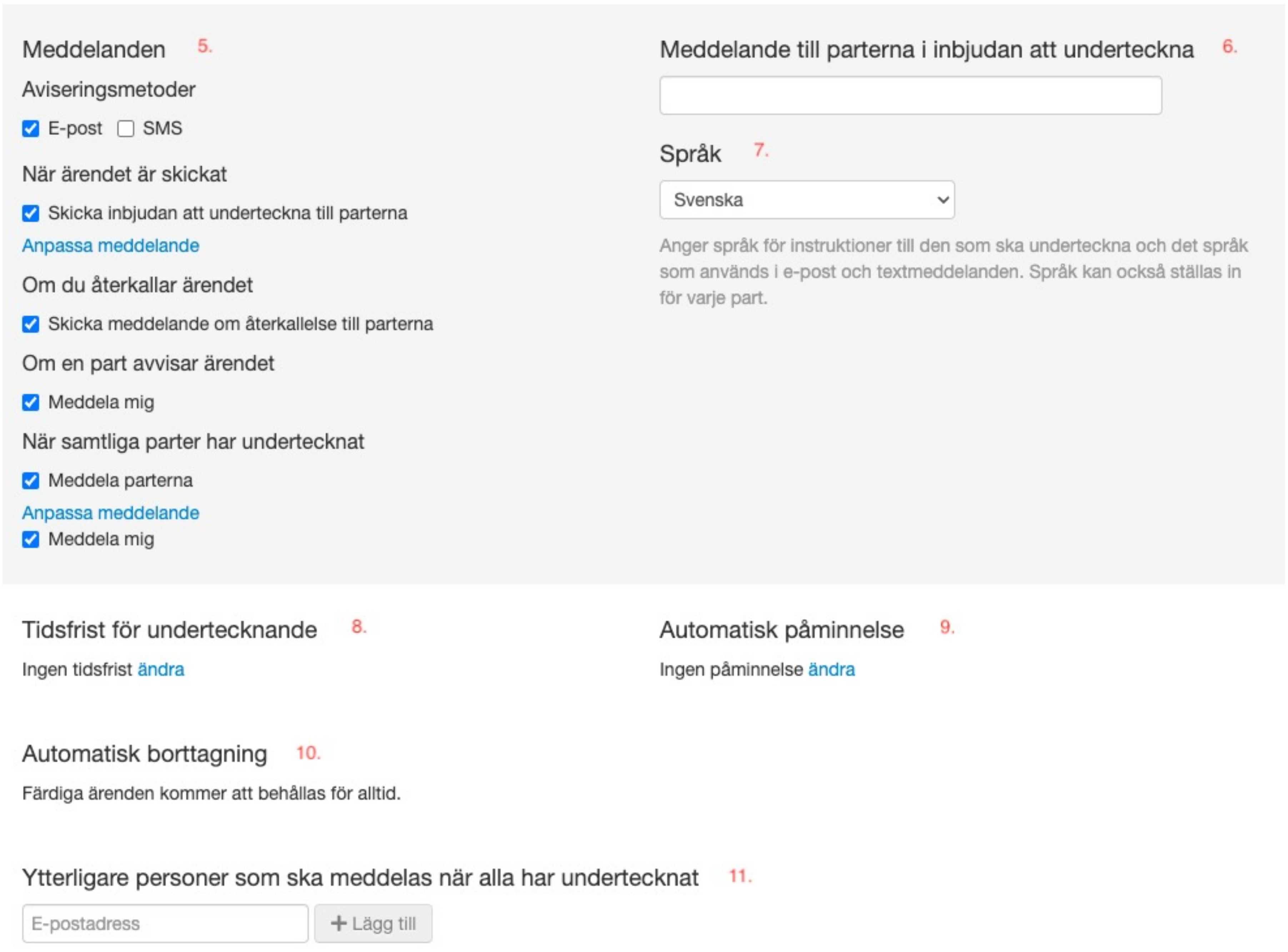
d) ***If a party rejects the case***. Notify me. When this box is checked, you as the agent will receive a message if a party chooses to reject your case.

e) ***When all parties have signed***.
Notify the parties. When the case is signed by all parties, a message is sent to the parties with a link to the case if this box is checked. You can also customize this case, see article above.



f) ***Notify me***. If this box is checked, you as an agent will also receive a message when the case is finished. If you are one of the signing parties, it is sufficient that the previous box is checked, otherwise you will receive double emails.

Case settings



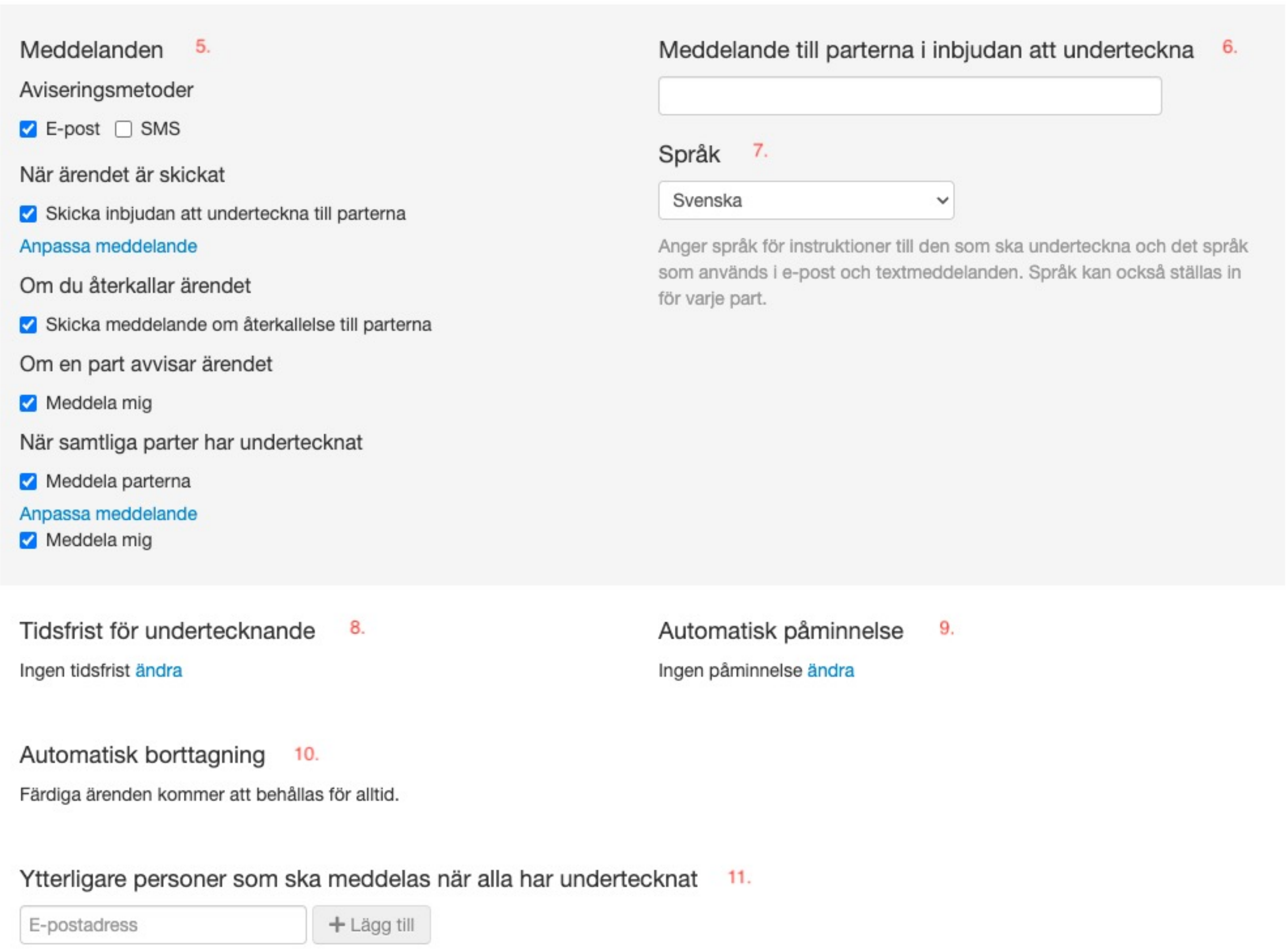
6. ***Include this note in the signature request.*** You can add your own message to the parties. You can read more about it here: https://support.assently.com/hc/sv/articles/204869875

7. ***Display language***. Specifies the language for the instructions to the person signing and the language used in the e-mail and text messages. Languages can also be set for each party.

8. ***Signing deadline***. If you do not want a document to be signed after a certain time, you can set a fixed date and time or a time period by specifying a certain number of days when the case deadline expires.

assently

Case settings



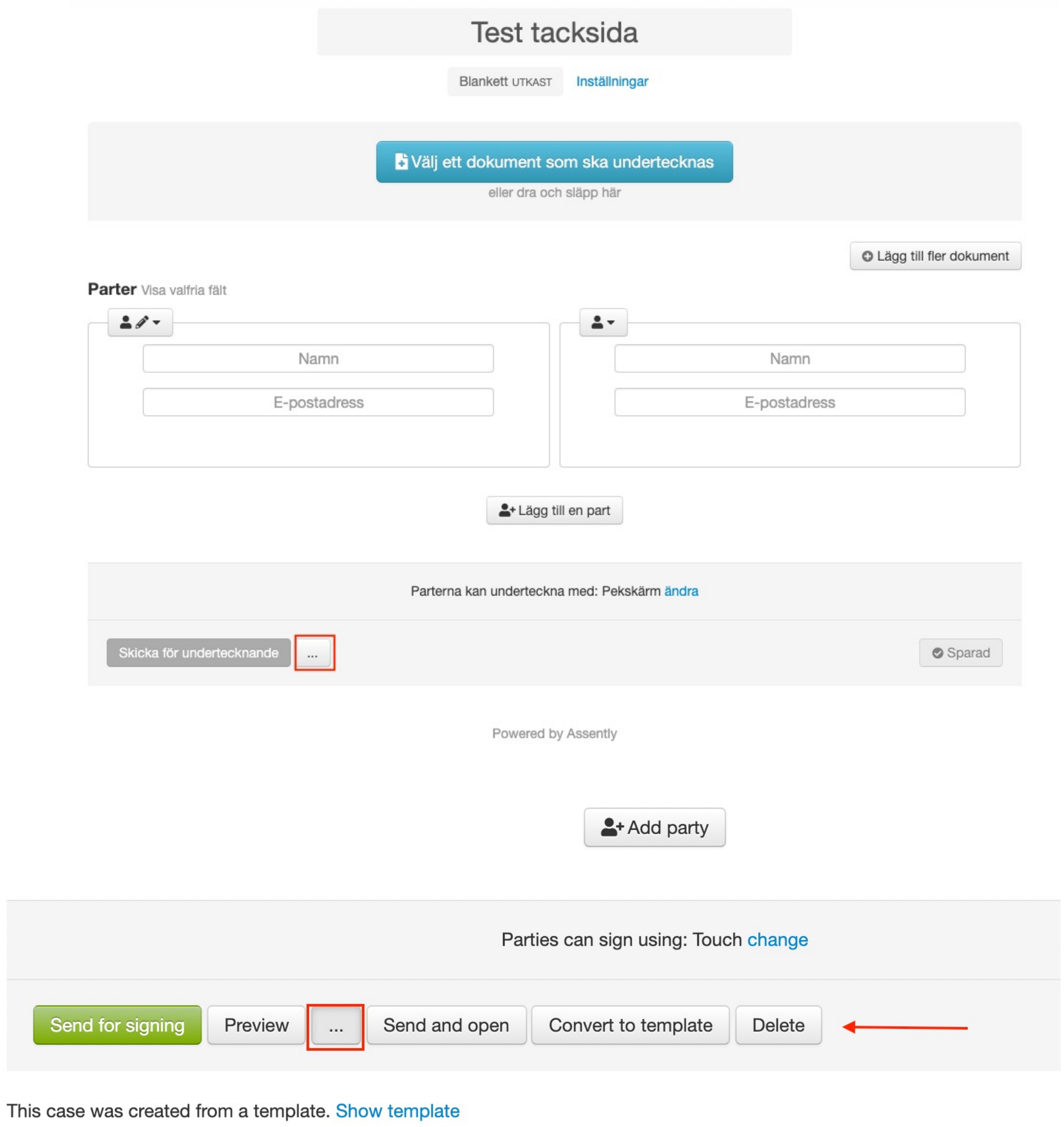
9. *Automatic reminder.* You can set when the system should remind parties who have not signed the case. The system only reminds once, then you must send out manual reminders.

10. *Automatic deletion.* By default, cases are saved until you delete them.
If you want completed cases to be deleted automatically after a certain number of days, you can set a retention period after which the case will be deleted automatically. You can set the retention period at the account level and at the template level. When a case is deleted, it is gone forever.

11. *Additional stakeholders to notify when all parties have signed.* You can add one or more email addresses to be notified when the case is signed. Examples of this could be that the HR department wants copies of all signed employment contracts or that they want to send a copy to an external CRM system. If you are creating a template for this purpose, then keep in mind: If you have created a *form template*, you need to log in to the system first before you can see the agreement. If you do not want the person to have to log in to the system and have direct access to the document, you choose *document template*.

Delete a case

Open the case, press the button with three dots... Choose Delete.



(In the same way, you delete a template.)

Alternatively, click on the white arrow next to the case in the list, select delete