

Recipients Page

The Recipients Page is used to define the general data of the envelope, and the signature workflow.

CREATE ENVELOPE

Envelope

Envelope

☐ Prevent sharing with team members

SETTINGS

Documents

UPLOAD

Drag & Drop files here

ADD A TEMPLATE

Recipients

1 Email First name Last name Mobile phone (Optional)

ADD RECIPIENT ADD SELF BULK SENDING DOWNLOAD TEMPLATE FOR BULK SENDING ADD AUTOMATIC

☒ Send finished documents to all signers and 'must view' recipients

Message

Subject Please sign the enclosed envelope

DELETE SAVE AS NEXT

The recipients page is separated into following sections, where the next chapters explain configuration and prerequisites in detail:

- Envelope (General Envelope Data)
- Documents
- Recipients (Activities)
- Document Visibility
- Messages
- Meta Data
- Advanced Settings

Envelope Section

The envelope section contains basic data valid for the entire envelope, such as the envelope name (visible in the eSignAnyWhere WebUI), or the team sharing configuration. Read more about team sharing in the chapter about [Team Configuration](#).

In the envelope settings you can configure the notification settings and the agreement configuration.

v 22.50

Additionally it is possible to configure the sealing certificate for the envelope. For more information please see [Custom Sealing Certificate](#) (since 23.49)

The agreement configuration is controlling if (and which) agreement texts are presented to signers and PKCS7 signers, after authentication in case an authentication method is configured. Please consider that agreement configurations are valid for signer activities only. In case of other activity types such as "Copy Recipient" or "Must View" activities, the acknowledge dialog is not displayed.

Please note: You can either use the organization agreement settings or configure a new agreement configuration for an envelope. Read [Agreements Configuration](#) about how to configure agreement texts on organization level.

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Documents

UPLOAD

ADD A TEMPLATE

Recipients

1 Email

ADD RECIPIENT ADD SELF BULK SENDING DOWNLOAD TEMPLATE FOR BULK SENDING

☒ Send finished documents to all signers and 'must view' recipients

Message

Subject Please sign the enclosed envelope

Dear #RecipientFirstName# #RecipientLastName#

#PersonalMessage#

Please sign the envelope #EnvelopeName#

Meta Data

Enter Meta Data (optional)

Advanced Settings

Envelope Settings

Notification Settings

Custom sender name

Preview of custom sender appearance: /a .com

Agreement Configuration

Use Organization Agreement Settings for signers ☒

Signature & Certificate Settings

Sealing certificate

(none)

CANCEL SAVE

CREATE ENVELOPE

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Documents

UPLOAD

ADD A TEMPLATE

Recipients

1 Email

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☒ Send finished documents to all signers and 'must view' recipients

Message

Subject Please sign the enclosed envelope

Dear #RecipientFirstName# #RecipientLastName#

#PersonalMessage#

Please sign the envelope #EnvelopeName#

Meta Data

Enter Meta Data (optional)

Advanced Settings

Notification Settings

Custom sender name

Manuel Gierlinger

Preview of custom sender appearance: Manuel Gierlinger via beta4.testlab.xzmo.com

Agreement Configuration

Use Organization Agreement Settings for signers ☐

English EDIT

Language

English

Header

Text

Default ☐

ADD CUSTOM AGREEMENT

CANCEL SAVE

Documents Section

The documents section allows to add, remove, re-order and change documents sent with an envelope. An envelope contains minimum one document, but can contain multiple documents. Note that a draft can be saved, or saved as template, also when no file was added yet. The application is designed to work with up to 50 documents per envelope. Restrictions may already apply, or may be introduced at a later time, to prevent larger numbers.

Supported file types:

- PDF (by default)
- In SaaS, with optional Document Converter installed, also the following other formats which are then converted to PDF:
 - Microsoft Office files from Microsoft Word, Microsoft Excel and Microsoft Powerpoint (.docx, .xlsx, .pptx)
 - Microsoft Office files in legacy file format from Microsoft Word, Microsoft Excel and Microsoft Powerpoint (.doc, .xls, .ppt)
 - Open Document Formats (.odt, .ods, .odp)
 - Text Files (.txt, .xml, .md)
 - Images (.tif, .png, .jpg, .gif, .jp2, .emf)

The file content might be validated server-side by a `FileContentValidationPlugin`, e.g. to perform checks for malicious content in the file.

When a new document was successfully added, the document is parsed for interactive fields or text placeholders:

- Advanced Document Tags, inserting interactive fields and assigning them to a recipient
Read more about Advanced Document Tags in the "[Text Placeholders Story](#)".
- Sig-String placeholder notation, inserting signature fields but not assigning them directly
- AcroForm Fields contained in the PDF, including signature fields. Those are also detected but not assigned to a recipient directly.

When the Advanced Document Tag notation was detected in a document, and interactive fields assigned to "signer1", "signer2" and so on have been recognized in a document, the recipient lines are automatically added to the Recipients section.

The document order can be re-arranged using Drag&Drop.

The button "Add Template" allows to add a predefined envelope template to the workflow. A template may include documents, recipient definitions and other configuration of an envelope. Templates are defined by saving a draft as template, or by creating a template in the Templates section of eSignAnyWhere.

Recipients Section

The application is designed to work with up to 50 recipients per envelope. Restrictions may already apply, or may be introduced at a later time, to prevent larger numbers than intended.

Recipient Primary Data Fields

Order Index (parallel)

A number allowing to set the activity sort order. Activities with same order index are considered as "parallel", i.e. both recipients get the invitation to sign in parallel. The one who opens the activity first, is automatically locking the activity until he/she completed all his/her form filling and signing tasks and he completed (or rejected) the activity. Instead of changing the order index manually, entire rows can be re-arranged by a Drag&Drop interaction.



When setting up parallel signers (transferring a recipient to another), the recipient's type (such as "Need to Sign") will automatically adjust to match that of the original recipient.

E-Mail

The value must be a valid mail address, containing at least one character in front of the @, and at least one character after the @, followed by one dot and at least one additional character. Mail addresses with multiple dots after the @ are of course supported.

The mass usage of non-existing mail addresses on environments operated by Namirial is considered as violation of the terms of use, as this can be an issue regarding mail classification rankings. If no mail should be sent, please set a mail with [@placeholder.com](#) - which we filter out programmatically.

The e-mail field shows up suggestions as autocompletion popup while typing. To get a full list of the values considered in auto-completion, use the "address book" icon next to the email input field. This will show up a dialog.

The dialog contains:

- entries from (personal) address book - see [Settings - Address Book](#)
- entries from organization-wide list of users
- recently used recipients

Entries are considered as "recently used" when they have been used by the sender as a recipient within the last 30 days, if and only if the envelope has not been deleted. To delete an envelope from the recently-used list, it is required to delete the envelope.

The team configuration has no impact on the list of "recently used" addresses. Only the sender's own recipients are shown.

First Name

The first name (given name) of the recipient. When signature fields of a recipient are configured to use disposable certificate signatures, the certificate holder given name is also taken from the recipient's first name.

Last Name


The last name (surname) of the recipient. When signature fields of a recipient are configured to use disposable certificate signatures, the certificate holder lastname is also taken from the recipient's last name.


Mobile Phone


The phone number, entered in international format with +xx country code prefix.


Recipient Type

The recipient type is chosen using a dropdown control with an Icon indicating the current selection:

 Needs to sign

 Receives a copy

 Must view

 Needs to sign (P7M)


Standard Recipient Types:

Signer	A signer may have tasks on the document assigned to him (Form field filling, signing, etc). It is not required that a signer really has a signature task assigned or signs a signature field (except such tasks or an assigned signature field is mandatory). A document can be assigned to a signer without having any tasks. The signer has to finish his activity by pressing the finish button; before an envelope gets routed to the next signer or before the envelope gets completed.
Must View	A recipient type where the activity is considered as completed once the recipient clicked the link in an e-mail to open the activity. It is not required to perform any activity in the document viewer.
Cc	Sends an E-Mail notification to this recipient, with the (signed) PDF attached. When the filesize of the PDF(s) exceeds the threshold configured per instance, a link to download the PDF(s) is sent instead.
PKCS#7	A PKCS7 recipient, instead of signing directly in the PDF, is confirming his signature by pressing the SIGN button which replaces the FINISH action of the workstep. The result of a PKCS7 signature is, instead of the signed PDF, {the .p7m signature container? A .p7s? Refer to the standard used.}

Special Recipient Types


Self	A recipient with the sender himself as signer is configured.
Automatic	See chapter "Automatic Sealing"
Bulk	Sends Ref to chapter "Bulk Sending"

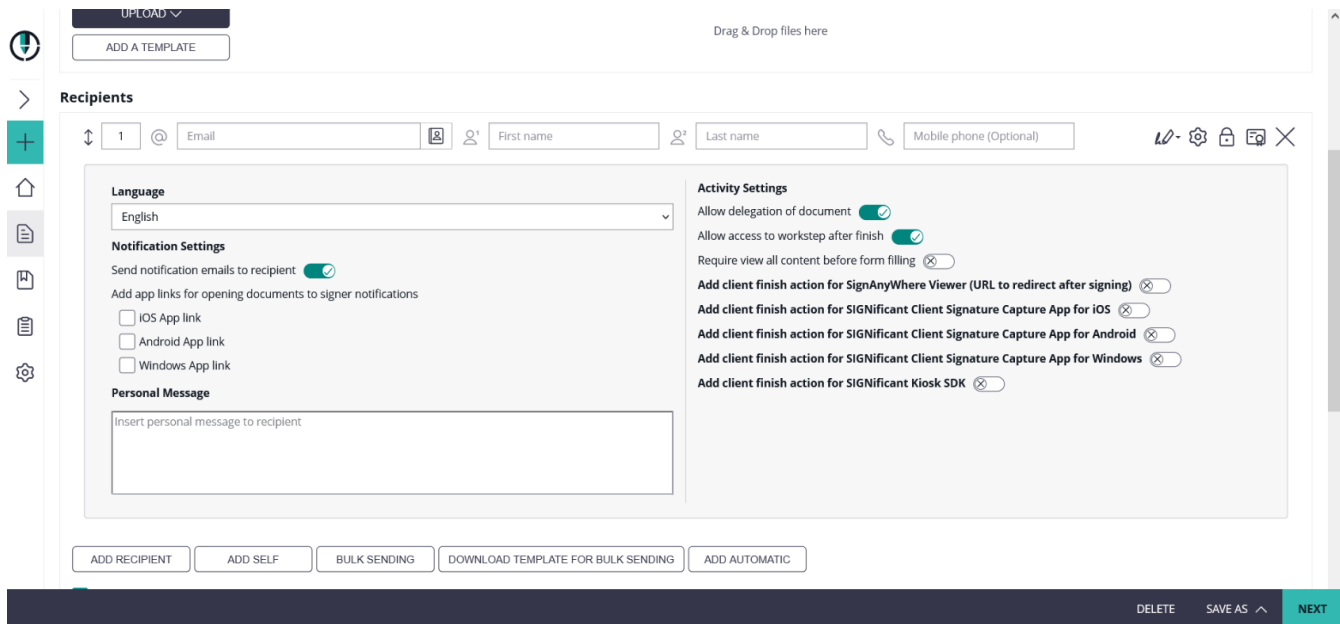
Recipient Settings

By pressing the Settings icon () on an activity that is involving a recipient, the settings area can be expanded. This block is replacing the former "personal message and language" block known from product versions before 22.50. In this area, the sender can define for each recipient in which language the recipient specific notifications should be sent, which recipient specific text (personal message) should be inserted in the signer invitation, and some other recipient specific settings.

Following settings are available for the recipients:

- Email Language
- Personal Message
- Adjust email settings **v 22.50**
 - Add app links to the signer invitation email
- Enable or disable delegation of the document **v 22.50**
- Add finish actions **v 22.50**

 Please note: If "Require view all content before form filling" is enabled the sequence mode will automatically switch to "sequence enforced". Consequently, enabling this setting will enforce the sequence of all tasks.



The screenshot shows the 'Recipients' configuration page. At the top, there's an 'UPLOAD' button and a 'Drag & Drop files here' area. Below is a 'Recipients' section with a table containing one recipient. The table has columns for 'Email', 'First name', 'Last name', and 'Mobile phone (Optional)'. To the right of the table are icons for edit, settings, lock, and delete. Below the table, there are four buttons: 'ADD RECIPIENT', 'ADD SELF', 'BULK SENDING', and 'DOWNLOAD TEMPLATE FOR BULK SENDING'. To the right of the table, there are two panels: 'Language' and 'Activity Settings'. The 'Language' panel has a dropdown menu set to 'English'. The 'Activity Settings' panel has several toggle switches: 'Allow delegation of document' (checked), 'Allow access to workstep after finish' (checked), 'Require view all content before form filling' (unchecked), 'Add client finish action for SignAnyWhere Viewer (URL to redirect after signing)' (unchecked), 'Add client finish action for SIGNificant Client Signature Capture App for iOS' (unchecked), 'Add client finish action for SIGNificant Client Signature Capture App for Android' (unchecked), 'Add client finish action for SIGNificant Client Signature Capture App for Windows' (unchecked), and 'Add client finish action for SIGNificant Kiosk SDK' (unchecked). At the bottom right, there are buttons for 'DELETE', 'SAVE AS', and 'NEXT'.


Language

All active languages as defined in Settings-Localization can be selected as recipient language. See [Localization Settings](#) for more details. But note that a recipient's configured language in the account settings is considered, in case the recipient has a user account on the same instance (not necessarily within the same organization). The configured recipient language will be ignored in this case.

Personal Message

The text must be provided already in the language selected as "recipient language", otherwise the recipient will likely receive an email with some language mixture.

The personal message is effective only if the personal-message placeholder was used in the Email Templates for the signer invite.

 HTML tags, with the exception of the
 tag, are not supported and are displayed as text.

Details for Authentication

Signature type:

UPLOAD

ADD A TEMPLATE

Drag & Drop files here

1

Email

1

First name

2

Last name

Mobile phone (Optional)

Digital Remote Signature

Disposable Certificate

SMS-OTP Signature

SwissCom On-Demand Certificate

Swedish Bankid

Personal Number

Allow changing of Personal Number

A-Trust Signature

Test-Plugin signature

ADD RECIPIENT

ADD SELF

BULK SENDING

DOWNLOAD TEMPLATE FOR BULK SENDING

ADD AUTOMATIC

Send finished documents to all signers and 'must view' recipients

DELETE

SAVE AS

NEXT

Authentication

UPLOAD

ADD A TEMPLATE

Drag & Drop files here

1

Email

1

First name

2

Last name

Mobile phone (Optional)

Authentication

Access code

Sms code

Windows live

Swedish Bankid

Personal Number

Allow changing of Personal Number

OAuth Authorization Providers

OAuth Identity Providers

ADD RECIPIENT

ADD SELF

BULK SENDING

DOWNLOAD TEMPLATE FOR BULK SENDING

ADD AUTOMATIC

Send finished documents to all signers and 'must view' recipients

Message

Subject: Please sign the enclosed envelope

DELETE

SAVE AS

NEXT

Parameters for Disposable Certificate

Disposable Certificate ^

Document type: - Please select -

Document number:

Document issued on: DD/MM/YYYY

Document issued by:

Document expiry date: DD/MM/YYYY

Identification Issuing Country: - Please select -

Identification type: - Please select -

Identification Number:

Mobile phone: No phone number specified

Document Issuing Country: - Please select -

VALIDATE RESET DATA

DELETED SAVE AS NEXT



The screen shows the field "Document Issuing Country", which is available as input field when the mode for disposable certificate was configured to use the "Lean Disposable Certificate", which is our recommendation. Note that the value "Nationality" will be requested, when using the (deprecated) classic disposable type instead.

Parameters for SMS-OTP Signature

SMS-OTP Signature ^

Mobile phone: No phone number specified

ADD RECIPIENT ADD SELF BULK SENDING DOWNLOAD TEMPLATE FOR BULK SENDING ADD AUTOMATIC

☒ Send finished documents to all signers and 'must view' recipients

DELETED SAVE AS NEXT

Similar as for the SMS Authentication or the mobile phone number in the parameters for the Disposable Certificate, the phone number is automatically kept in sync with the recipient's primary phone number by default. When a different phone number should be used, select the toggle button labeled as "custom", and define a specific phone number for late authentication via SMS-OTP when performing an SMS-OTP signature.

The value can be kept empty (via recipient's primary phone number, or by setting a custom number and deleting the value). In this case, the signer is asked to enter his own phone number; still with the evidence of used phone number in the audit trail.

Parameters for Swisscom On-Demand Certificate

UPLOADED

ADD A TEMPLATE

Drag & Drop files here

Recipients

1 | Email | First name | Last name | Mobile phone (Optional)

Digital Remote Signature ▾

Disposable Certificate ▾

SMS-OTP Signature ▾

SwissCom On-Demand Certificate ▴

Mobile phone: No phone number specified

Common Name:

Country of residence: - Please select -

Swedish Bankid ▾

A-Trust Signature ▾

Test-Plugin signature ▾

ADD RECIPIENT | ADD SELF | BULK SENDING | DOWNLOAD TEMPLATE FOR BULK SENDING | ADD AUTOMATIC

DELETE | SAVE AS | NEXT

Document Visibility Section



The document visibility section, which is shown only when:

- the feature flag "DocumentVisibility" is enabled,
- more than one recipients are added as signers (all recipients must have all mandatory fields filled - email, first name and last name),
- more than one documents are added to the envelope

Can be used to hide a document from some of the recipients while other recipients are able to read all (or other) documents of the envelope.

Please note the following:

- A document has to be visible to at least one recipient
- each recipient has at least one document visible

Typical scenarios:

- A contract has to be signed by 2 signers, but the payment form or SEPA mandate should not be visible to him because it is declared as a present granted by the other signer.
- In insurance business, an external agent who is acting as a broker needs to add a broker statement to an insurance contract. The broker statement should be visible (and signed) by the agent, but should not be visible to the policy owner.

The section is by default collapsed (indicated by the 2-arrows-down icon ▾). When clicking on the section headline, the section gets expanded and offers on/off sliders which grant access to a document to a specific recipient.

[illegible]

Message Section


The message section is intended to overwrite the default signer invitation message and subject.

Note that the text contained in the signer invitation can be defined only in one language, typically the sender language.

Please also see the next table which contains all available placeholders for the message section:

Placeholder	Description
#ContactUrl#	The URL refers to the company's contact info, which is defined in the organization settings.
#EnvelopeMessage#	The message which is defined for the envelope. It may contain the personal message defined per recipient.
#EnvelopeName#	The name of the envelope. If not specified differently, it is by default the file name of the first PDF document.
#ExpirationDate#	The expiration date of an envelope. The date format is defined in the user account settings.
#PersonalMessage#	The personal message for a recipient. It may be included in the general envelope message if it was defined before.
#RecipientEmail#	Email address of the envelope recipient.
#RecipientFirstName#	First name (given name) of the envelope recipient.
#RecipientLastName#	Last name (surname) of the envelope recipient.
#SenderFirstName#	First name (given name) of the envelope sender.
#SenderLastName#	Last name (surname) of the envelope sender.
#SupportUrl#	The URL refers to the company's support website, which is defined in the organization settings.
#Url#	The context specific URL used in a link button to execute an action (e.g. URL for Login, URL to open an envelope, URL to download documents, etc.).
#UrlAndroid#	The URL to open a signing request in the Significant App Client Signature Capture for Android.
#UrlIos#	The URL to open a signing request in the Significant App Client Signature Capture for iOS.
#UrlWindows#	The URL to open a signing request in the Significant App Client Signature Capture for Windows-Store.
#UserFirstName#	First name (given name) of a user, who is either the web UI user or the envelope sender(depending on the context).
#UserLastName#	Last name (surname) of a user, who is either the web UI user or the envelope sender(depending on the context).

Meta Data Section

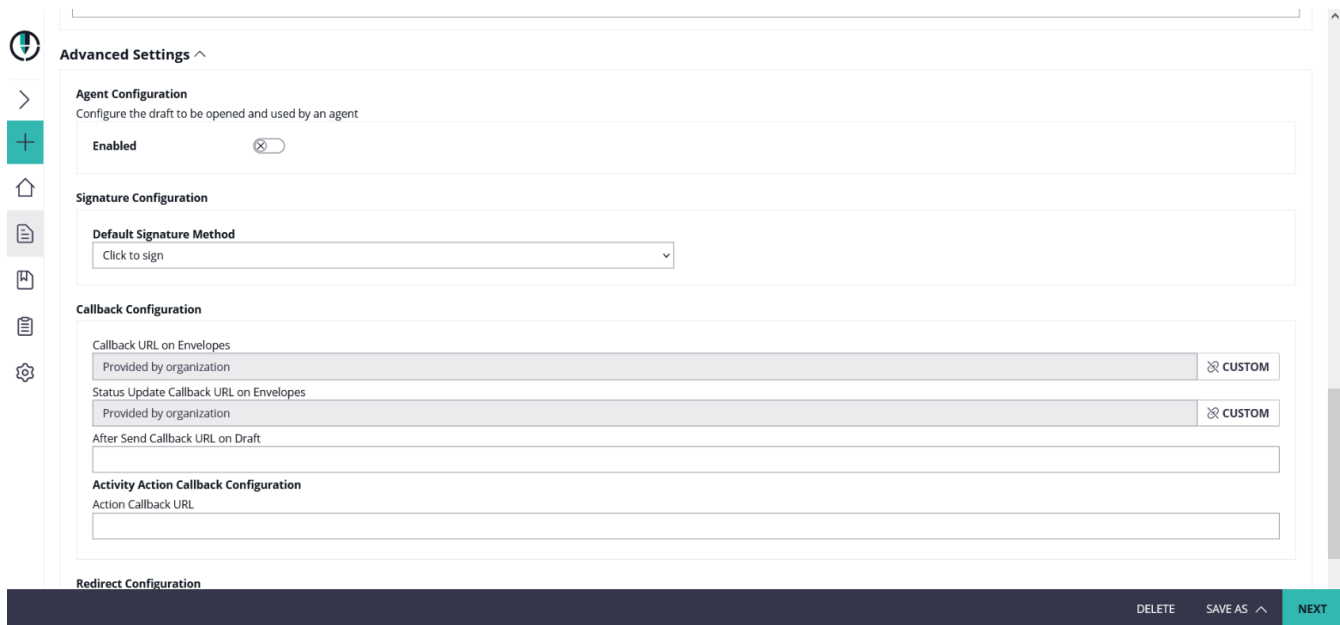
 The meta data section is available only when its usage is allowed in Organization Settings (Section "Recipient Settings", Flag "Allow to set envelope meta data"). In addition, the Meta Data section will be hidden when a "Default redirect url before sending a draft" is defined in Settings-Organization. A custom page before sending is a customer specific integration, which can e.g. implement a dialog asking for metadata in a specific format showing a convenient UI, instead of just expecting the sender to define a free-hand XML or other desired specific format.

The metadata section allows to set meta data in free-text format, which are accessible for an integration e.g. in a Callback Handler. We recommend (but do not enforce) to fill the data with a valid XML structure.

Depending on contractual agreements, this section may also be used e.g. to document which agent performed an identification in fulfillment of the obligations of Local Registration Authority (LRA), before issuing a disposable certificate.

Advanced Settings v 22.50

In the advanced settings on the create envelope page you can find settings for the agent redirect. Beside the different policies it is also possible to allow a URL for iFrame integration. Moreover, you can add callback configuration for the envelope and set a default signature method. Please see the next figure where you can find the settings:



The screenshot shows the 'Advanced Settings' page with a sidebar on the left containing icons for home, list, document, and settings. The main content area is titled 'Advanced Settings ^' and contains several sections:

- Agent Configuration**: 'Configure the draft to be opened and used by an agent'. It has a toggle switch labeled 'Enabled' which is currently turned on.
- Signature Configuration**: 'Default Signature Method' is a dropdown menu showing 'Click to sign'.
- Callback Configuration**:
 - 'Callback URL on Envelopes': A text field with 'Provided by organization' and a 'CUSTOM' button.
 - 'Status Update Callback URL on Envelopes': A text field with 'Provided by organization' and a 'CUSTOM' button.
 - 'After Send Callback URL on Draft': An empty text field.
- Activity Action Callback Configuration**: 'Action Callback URL' is an empty text field.
- Redirect Configuration**: This section is partially visible at the bottom.

At the bottom right of the page, there are buttons for 'DELETE', 'SAVE AS ^', and 'NEXT'.

Agent configuration

Choose between the following policies:

- To recipient page
- To designer page
- To summary page

Sample for agent redirect configuration:

`https://##domain##/AgentRedirect/index?draftid=##draftid##`

iFrame



The allowed URL for iFrame integration should only contain a specific base URL without any route. Sample:



Valid URL: "<http://www.example.com>"



Invalid URL: "http://www.example.com/additional_route"

For information about an iFrame use case please see: [Integration and FAQ](#) (restricted access)

Callback configuration

Callback type	Status change
Callback for completed envelope	Gets fired whenever an envelope gets finished (completed or rejected)
Callback for envelope status change	Gets fired whenever an envelope's status value changes (workstepFinished, workstepRejected, workstepDelegated, workstepOpened, sendSignNotification, envelopeExpired, workstepDelegatedSenderActionRequired)

For more information please see the [Organization Settings#DefaultCallbackURL](#).

Activity Action callback configuration

These events are fired by the Workstep Controller (internal component) and are fired before the data in eSAW is complete updated (some post-processing is required). Therefore this event callbacks are used only in rare integrations. Detailed information about all event types can be found here: [API Documentation](#)

Redirect configuration

Redirection before sending and after sending can be configured here. For more information especially about before sending redirect URL use case can be found here: [Custom Page before Sending](#)