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eSignatures from within Silverfin

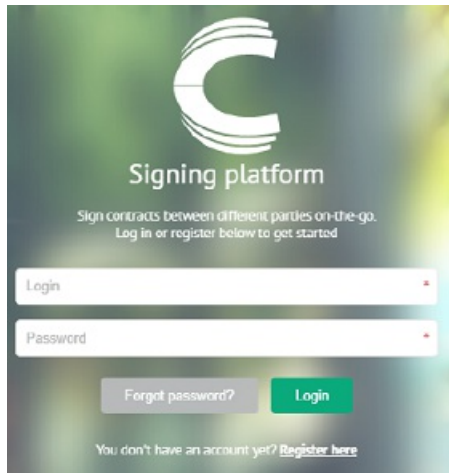
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1. Sign up for an eSignatures account

To send documents for signing as a Silverfin user, you need to sign up for an eSignatures account.

Note: if you already received your eSignatures credentials from your administrator, please skip this step.

- Open your eSignatures environment in a Web browser. If you don't know the URL, contact your administrator.
- Click **Register here** at the bottom of the page.



- Fill out your personal information:
 - First name
 - Last name
 - Company (Optional)
 - Email address

Important: the email address must be unique. If another user with the same email address already exist in your eSignatures solution, no confirmation email will be sent after you've completed the registration form.

- Enter a password of your choice and confirm the password. The password must meet the following requirements:
 - Contain at least 6 characters, and no more than 127 characters
 - Contain at least 1 uppercase letter
 - Contain at least 1 lowercase letter
 - Contain at least 1 number
 - Contain at least 1 special character (e.g. whitespace, symbol, etc.)
- Read the terms and conditions, and then select **I have read and agree to the terms and conditions.**
- Click **Register.**

An email will be sent to your email account.

- Open the email you received from your eSignatures solution.

Tip: if you don't see the email in your Inbox, check your Spam or Junk folder.

- Click the secure link in the email to complete the registration.
- In the window that opens, click **Confirm registration.**

2. Link your Silverfin account to your eSignatures account

Once you've [signed up for an eSignatures account](#), you need to link it to your Silverfin account.

Prerequisite: your administrator must have made the connector available for the linking to work. To check the availability, contact your administrator.

Step 1: Silverfin credentials

- Go to <https://connective.comax.be>.

Attention: If you're using an SSO integration with Silverfin, you need to use the following link:

<https://connective.comax.be?sso=<domain>> where '<domain>' is the domain used for the Silverfin SSO integration.

- Click **Sign in to Silverfin**.

Create Silverfin - Connective link



- Enter your **Silverfin username** and **password**, and click **Login**.

The screenshot shows the 'Sign In' form with the following elements: a title 'Sign In', an 'Email' label above a text input field, a 'Password' label above a password input field, a green 'Login' button, and a link for 'Forgot your password?' at the bottom.

- You are now asked to authorize Comax to use your account. Click **Authorize** to do so.

Authorization required

Authorize **Comax** to use your account?

This application will be able to:

- know your email address
- read all documents
- write to documents
- read financial information
- create links in the application
- read basic information of your firm

Authorize

Deny

Step 2: Connective info

- Enter your **Connective username**. This is the email address you used to sign up for an eSignatures account.
- Select a **preferred language**. The eSignatures interface will be displayed in this language.
- Select a **document group** to which your documents will be uploaded. By default, this is **My Documents**.
- Then click **Link accounts**.

Create Silverfin - Connective link

Step 1: Silverfin credentials

✓ Logged in as: [redacted]

Step 2: Connective info

Connective username

Enter your Connective username here

Language

Choose a preferred language

My Documents

Choose a document group to which your documents will be added

Link accounts

- When the link was successful, the following message is displayed:

Link succesful!

Silverfin and Connective were linked succesfully. You can now send files directly to Connective from your Silverfin documents.

More information:

Silverfin account: [redacted]

Connective account: documentation.connective@gmail.com

Selected language: English

Selected document group: My Documents

[Go to Silverfin](#)

[Open Connective](#)

- Click **Go to Silverfin** to open your Silverfin environment and [create a document for signing](#).
- Or click **Open Connective** to open Connective eSignatures.

3. Upload documents to Connective eSignatures

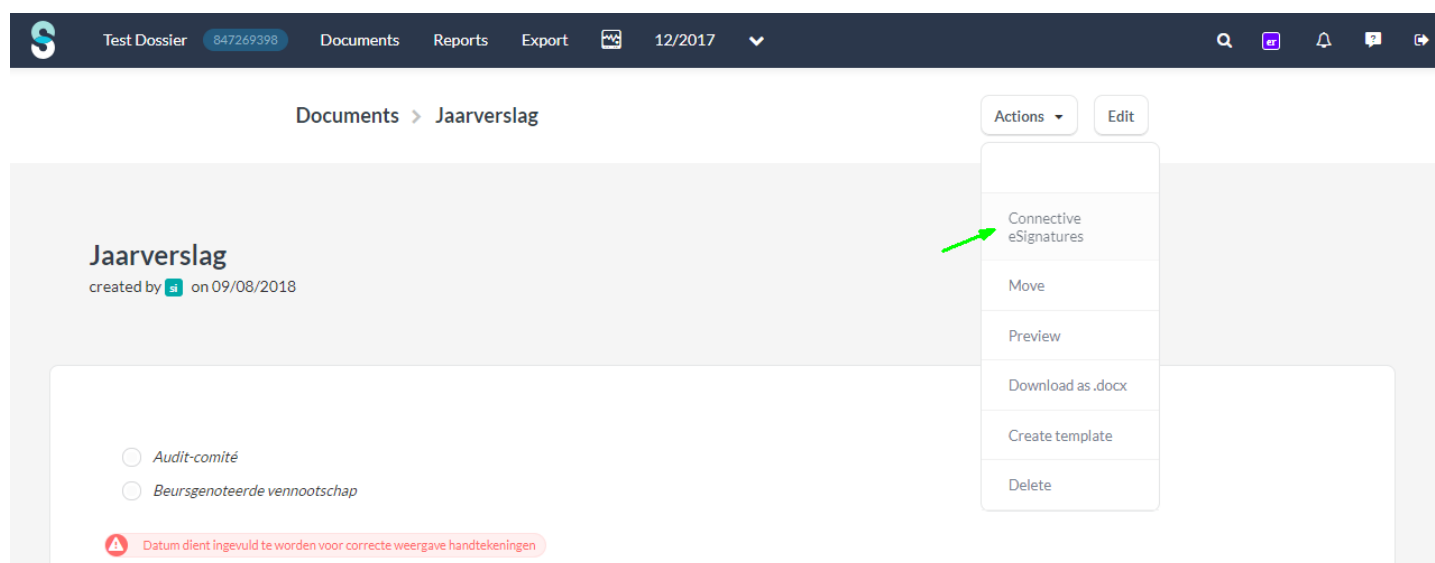
Once your Silverfin and eSignatures accounts are linked, you can upload a **document**, or a **folder of documents**, to Connective eSignatures and send them for signing.

- Log in to your Silverfin environment.
- Open the **document** you want to be signed.
- Or, if you want to upload multiple documents simultaneously: create a folder, move your documents to the folder and open it.

Important: make sure all documents contain appropriate **sign markers**.

- Then, click the **Actions** list and click **Connective eSignatures**.

Note: when sending folders, you need to send the entire folder. It's currently not supported to select only a few documents within a folder and then try to send them.



Tip: if the **Connective eSignatures** button is not available, you may be trying to send unsupported document types, or you selected only a few documents within a folder as explained above. Consult the table hereunder for the supported Silverfin document types.

If you selected a supported document type and the **Connective eSignatures** button is still not available, contact your administrator.

ENGLISH	FRENCH	DUTCH
General company information	Coordonnées de l'entreprise	Bedrijfsparameters
Reports to the managing director(s)board of directors (as preparation for the GM)	Rapport du (des) gérant(s) du conseil d'administration (en préparation de l'AG)	Raad van bestuur
Minutes of the general meeting	Rapport de l'assemblée générale	Verslag van algemene vergadering
Postponement of the general meeting	Prorogation de l'assemblée générale	Verslag van uitstel van algemene vergadering
Annual financial statement	Rapport annuel	Jaarverslag

ENGLISH	FRENCH	DUTCH
Special meeting	Rapport spécial	Bijzonder verslag alarmbelprocedure

- After you clicked **Connective eSignatures**, wait for a moment while the document (folders) are being sent.

Sending Document

Please wait, your document is being sent to Connective.

3.1 Sign locations

The sign locations are retrieved automatically, and must now be completed.

The number of sign locations per document are indicated next to the document name.

If you uploaded a folder of documents, the different documents are listed alphabetically.

Sign Locations

0 Enable sequential signing (drag forms below to sort)



✓ Minutes of the general meeting: test5 (Location 1/1)

✓ Verslag uitstel algemene vergadering: test5 (Location 1/1)

Tip: If no sign markers are found, an error message is displayed and you won't be able to complete the upload process. Return to Silverfin and fix your documents.

To complete a sign location:

- Expand the required sign location.
- Select the signing type(s) you want to signer to choose from. When you select multiple types, the signer may choose any of them to sign the document.

Tip: see [What are the different signing methods?](#) in the eSignatures User Documentation for more information.

Sign Locations

0 Enable sequential signing (drag forms below to sort)

Minutes of the general meeting: test5 (Location 1/1)

Select allowed signing methods

Manual
Beld
ManualBeld
SmsOtp
MailOtp
Idin
Biometric
BeLawyer
Itsme
OpenIdConnect:OIC

Phonenumber

Enter phone number including country code here

- Enter the signer's data:
 - First name
 - Last name
 - Email address
 - Telephone number, including country code

(Only mandatory when **SmsOtp** is selected as signing type)

3.1.1 Arrange the signers (optional)

When multiple signers need to sign the document, multiple sign locations are retrieved. By default, the order in which the different signers sign doesn't matter. They all sign in parallel.

If you want to define a fixed signing order, select **Enable sequential signing**. Then drag the different signers to their desired position. In this case a signer won't be able to sign the document if their preceding signer hasn't signed it yet.

3.2 Connective info (optional)

In the **Connective info** section you configure the signer's **preferred language**, and the **document group** to which the document will be uploaded.

The emails the signer will receive and the signing page will be displayed in the language you select here.

Connective info

Dutch
Choose a preferred language

My Documents
Choose a document group to which your documents will be added

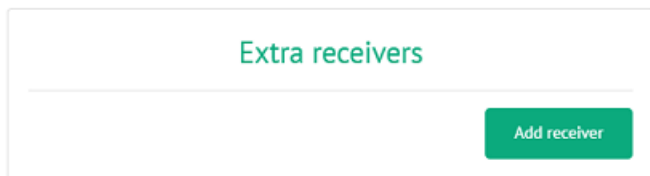
3.3 Extra receivers (optional)

A copy of the fully signed document is automatically sent to the signer, once he or she has signed.

If you want other people to receive the signed document as well, add them as receiver.

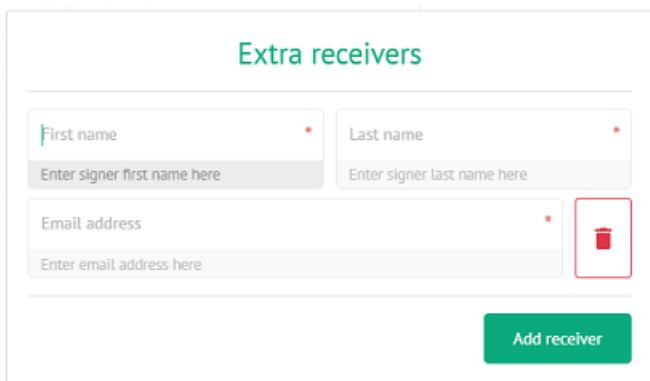
To do so:

- Click **Add receiver**.



The screenshot shows a rectangular box with a light green header containing the text "Extra receivers". Below the header is a horizontal line, and at the bottom right of the box is a green button with the text "Add receiver".

- Enter the receiver's **first name**, **last name** and **email address**.



The screenshot shows the "Extra receivers" form with three input fields. The first field is labeled "First name" with a red asterisk and a placeholder "Enter signer first name here". The second field is labeled "Last name" with a red asterisk and a placeholder "Enter signer last name here". The third field is labeled "Email address" with a red asterisk, a placeholder "Enter email address here", and a red trash icon to its right. A green "Add receiver" button is located at the bottom right of the form.

3.4 Send the document

- When you're done, click **Send Documents**. The signers now receive a secure email with a link to the document they need to sign.

See [4. Sign your document with Connective eSignatures](#) for more information.

- Click **Back to Silverfin** to send more documents.
- Or click **Open Connective** to open the eSignatures WebPortal directly to sign documents.

4. Sign your documents with Connective eSignatures

In this section you'll learn how to sign a Connective eSignatures document step-by-step.

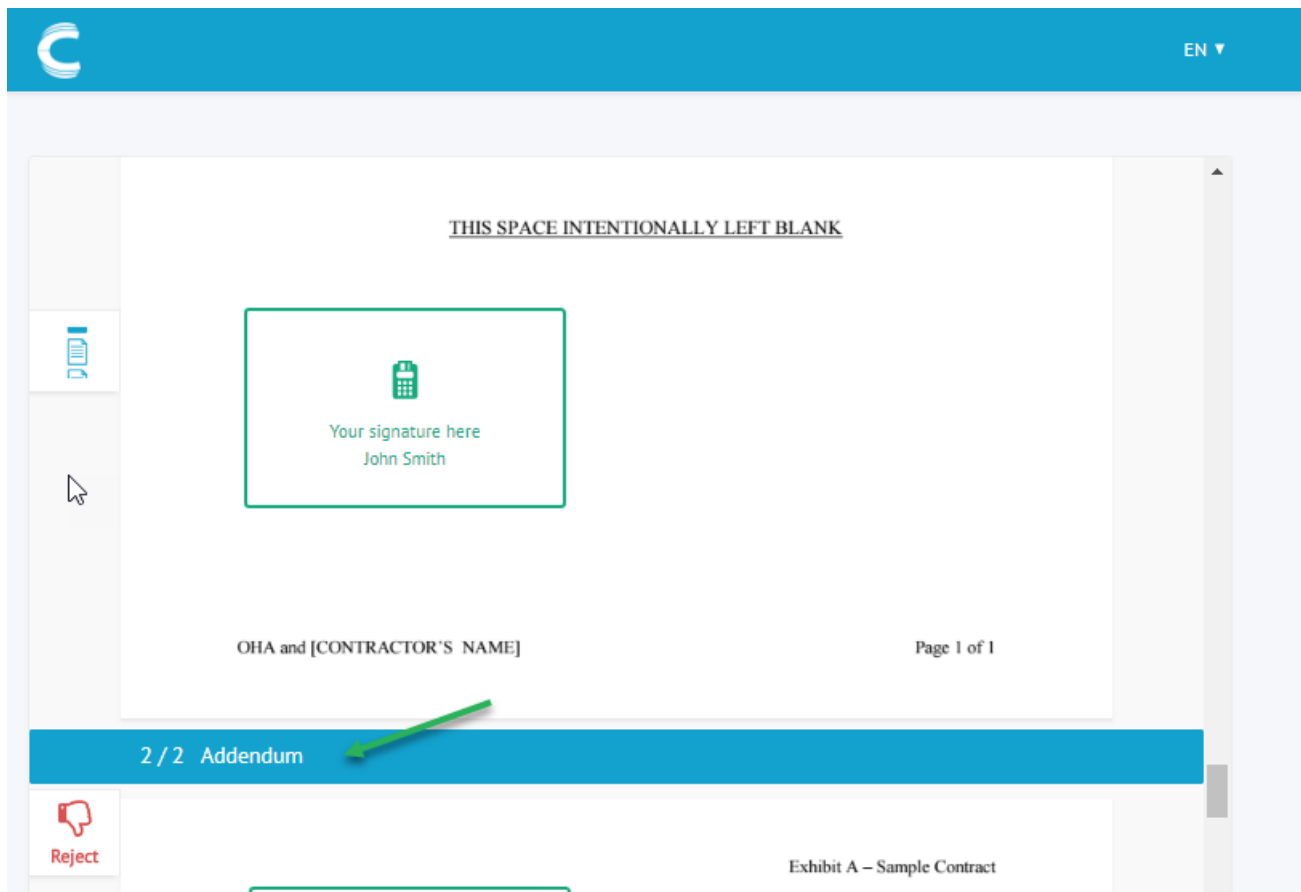
- Open the email you received from your eSignatures solution.
- Click the secure link inside the email. The document will open in a new tab in your default web browser.

Important: this link will only work once. Once you've clicked it, you need to sign or reject the document. If the link expired, click **Request a new email** to receive a new link.

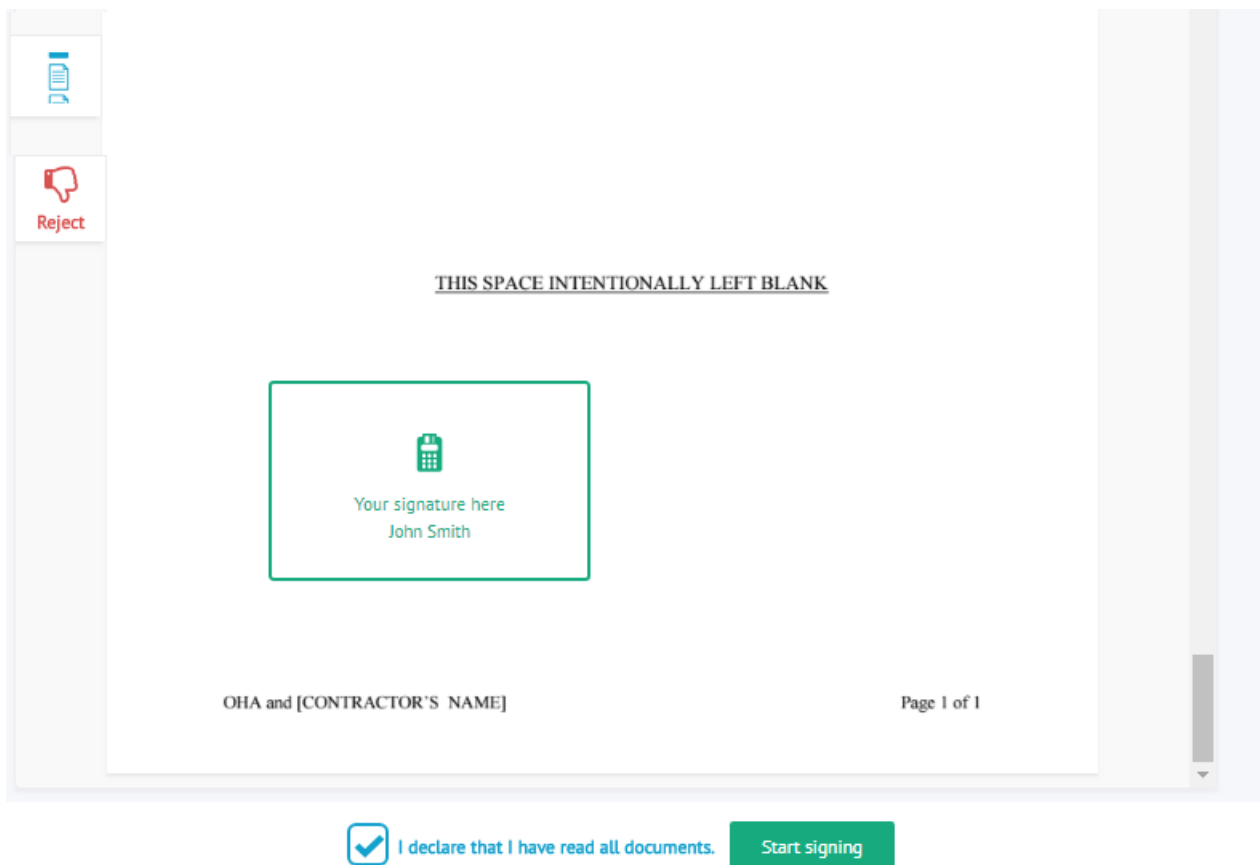
Please sign your document or package with name SAMPLE_CONTRACT Inbox x



- Read the entire document and scroll down to the last page. If your package contains multiple documents, the start of each document is indicated by a header. The header also indicates how many documents the package contains, and which document you are viewing.

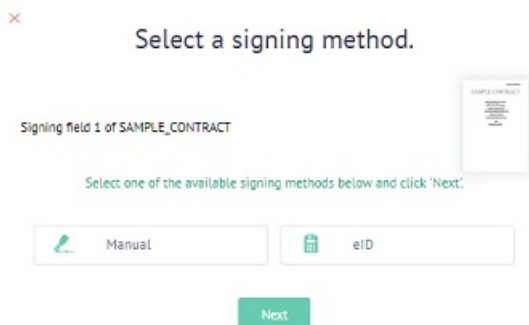


- When you've scrolled down to the last page, the checkbox **I declare that I have read all documents** now becomes available. Check it and then click **Start signing**.



Choice of signing

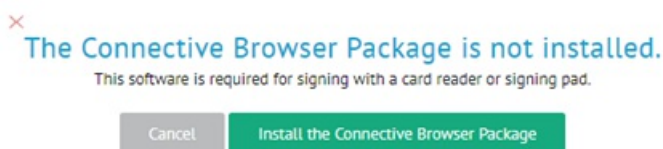
If multiple signing methods have been defined, you are prompted to **select a signing method**. Select your preferred signing method, and then click **Next**.



Install the Connective browser package

Depending on the signing method that was defined for you, you might be prompted to install the Connective browser package. The Connective browser package is required on Windows and macOS when using any signing method that requires additional hardware:

- **eID signing**: requires an eID card reader
- **BeLawyer signing**: requires a transparent card reader
- **Biometric signing**: requires a biometric signing pad



To learn how to install the Connective browser package, see the [Browser package section](#) on the documentation website.

Note: when using Internet Explorer, do *not* use Compatibility View. This is not supported by the Connective browser package.

Sign the document

Once the browser package has been installed, follow the instructions on the screen to sign your document.



Sign with eID

Signing field 1 of marker



Connect a card reader and insert your card.

5. Where can I find my signed documents in Silverfin?






Once your signer has signed the document you sent, the fully signed version is uploaded to your Silverfin environment. You'll find it in a **Connective** subfolder at the location of the original document/folder.

Documents

Actions ▾

Search

Drag or [click here](#) to add new documents

 Bedrijfsparameters	Silverfin Support	09/08/2018
 Connective		25/09/2018
 Jaarverslag	Silverfin Support	09/08/2018
 opdrachtbrief_modellAB	Eric	05/11/2018
 Verslag Algemene Vergadering	Silverfin Support	09/08/2018