



DOCONCHAIN
SECURING YOUR DIGITAL WORLD



USER MANUAL

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Find the latest version here:
<https://doconchain.com/user-manual>

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CHAPTER 1: INTRODUCTION

Despite the rapidly developing technologies, many organizations and companies are still struggling to fully transition to paperless environments. While electronic documents, emails, and databases have become commonplace, the process of data authentication has remained manual. Traditional methods, such as printing, signing, scanning, delivering, and archiving paper copies, are inefficient, costly, and vulnerable to fraud.

The advent of blockchain technology offers a promising solution to this longstanding challenge. Blockchain-secured digital signatures provide a secure, transparent, and tamper-proof method for authenticating digital data. By leveraging the hack-proof nature of blockchain, these signatures can meet the stringent requirements for data authentication:

- **Security:** Blockchain's distributed ledger ensures that data cannot be altered or tampered with. Every transaction is recorded and verified by multiple nodes, making it virtually impossible for malicious actors to manipulate the information.
- **System independence:** Blockchain-secured signatures are independent of the underlying data creation system. This ensures that the authenticity of the data can be verified regardless of the software or platform used to generate it.
- **Validation over time:** Blockchain signatures are permanent records. Once a signature is created and added to the blockchain, it cannot be modified or deleted, ensuring that the authenticity of the data can be verified at any point in the future.

By adopting blockchain-powered signatures, organizations can:

1. **Reduce costs:** Eliminate the need for printing, scanning, archiving, and shipping paper documents.
2. **Improve efficiency:** Streamline workflows and reduce the time spent on manual authentication processes.
3. **Enhance security:** Protect sensitive data from fraud and unauthorized access.
4. **Strengthen customer trust:** Demonstrate a commitment to data integrity and transparency.

As blockchain technology continues to mature and become more widely adopted, blockchain-powered signatures are poised to revolutionize the way organizations authenticate digital data. By embracing this innovative solution, businesses can unlock new opportunities, reduce risks, and stay ahead of the curve in the digital age.

DOCONCHAIN aims to bridge the significant gap between traditional and digital signing. Our commitment to delivering excellence and ensuring the success of our customers is guided by our core principles and values. By providing innovative blockchain-powered solutions, we empower organizations to embrace the digital future with confidence and security.



CHAPTER 2: GETTING STARTED

DOCONCHAIN provides a standalone Software-as-a-Service (SaaS) platform with a suite of products and services that allow customers to manage documents and collaboration around them using an innovative digital signature system, a workflow automation, and a secured storage of signed documents. DOC also provides application programming interfaces (“APIs”) that allow Customers to use the DOC solutions within a customer’s websites, applications, or other systems (“Customer Properties”).

2.1. ACCOUNT CREATION

To use DOCONCHAIN's services, including signing documents and accessing features, you (the Customer), and any authorized users you designate need to create a DOC account. This account requires accurate, current, and complete information. All account details are subject to DOC's Privacy Policy, which you can find at <https://app.doconchain.com/privacy-policy>. To ensure you receive important information like emails, documents, and notifications, please keep your account information up to date.

To create an account, a user can navigate to the DOCONCHAIN website (www.doconchain.com) and click on “Try for Free”, this will redirect to the online web application (<https://app.doconchain.com>).



User can also create an account directly on our online application (<https://app.doconchain.com>) and click on “Sign Up”.



2.1.1. SIGN UP MANUALLY

Upon clicking the SIGN UP button, the user will be prompt to a **Sign Up** modal where the following information must be provided.



The image shows a 'SIGN UP' form for DOCONCHAIN. The form is titled 'DOCONCHAIN SECURING YOUR DIGITAL WORLD'. It has a 'LOGIN' button and a 'SIGN UP' button. The form fields are: First Name, Last Name, Email, Password, and Confirm password. There are also checkboxes for password requirements (8 Characters, Uppercase, Lowercase, Special Character, Number) and a legal acknowledgment checkbox. The form is annotated with numbers 1 through 6, pointing to the First Name, Last Name, Email, Password, Confirm Password, and Legal acknowledgment checkbox respectively.

1 First Name

2 Last Name

3 Email

4 Password

5 Confirm Password

6 Legal acknowledgment checkbox

1. **First Name** – Enter your given name

2. **Last Name** – Enter your family name or surname

3. **Email** – Provide your email address; make sure that the email is existed and active as it will be used also for account verification, password recovery, platform notifications, etc.

4. **Password** – must be eight (8) or more characters long and include at least one (1) of the following:

- Uppercase
- Lowercase
- Special Character
- Number

5. **Confirm password** - Re-enter the same password in this field to ensure accuracy and prevent typos.

6. **Legal acknowledgement checkbox** – Tick the checkbox labeled: "By creating an account, I agree to the Terms of Use and Privacy Policy." This confirms your consent to DOCONCHAIN's legal terms and is required to proceed.



Once done, the SIGN UP button below will be enabled and you may click it to proceed and check your email for the Verification Code.

The image shows the DOCONCHAIN SIGN UP form. It has a dark blue background with the DOCONCHAIN logo at the top. The form includes fields for Name (Rico), Email (Flores), Password (8 characters), and Confirm Password. Below the password fields are checkboxes for password requirements: 8 Characters, Uppercase, Lowercase, Special Character, and Number. At the bottom, there is a checkbox for 'By creating an account, I agree to the Terms of Use and Privacy Policy.' and a 'SIGN UP' button, which is highlighted with a red rectangle. Below the button are social media icons for Google, LinkedIn, and Microsoft.



Input the verification code sent to your email to continue.

The image shows the DOCONCHAIN Verify Email form. It has a dark blue background with the DOCONCHAIN logo at the top. The form includes a 'Verify Email' section with a text input field for the verification code. Below the input field are 'VERIFY EMAIL' and 'RESEND CODE' buttons. At the bottom, there are social media icons for Google, LinkedIn, and Microsoft.



Once done, the **VERIFY EMAIL** button will be enabled. You may click the button to proceed.

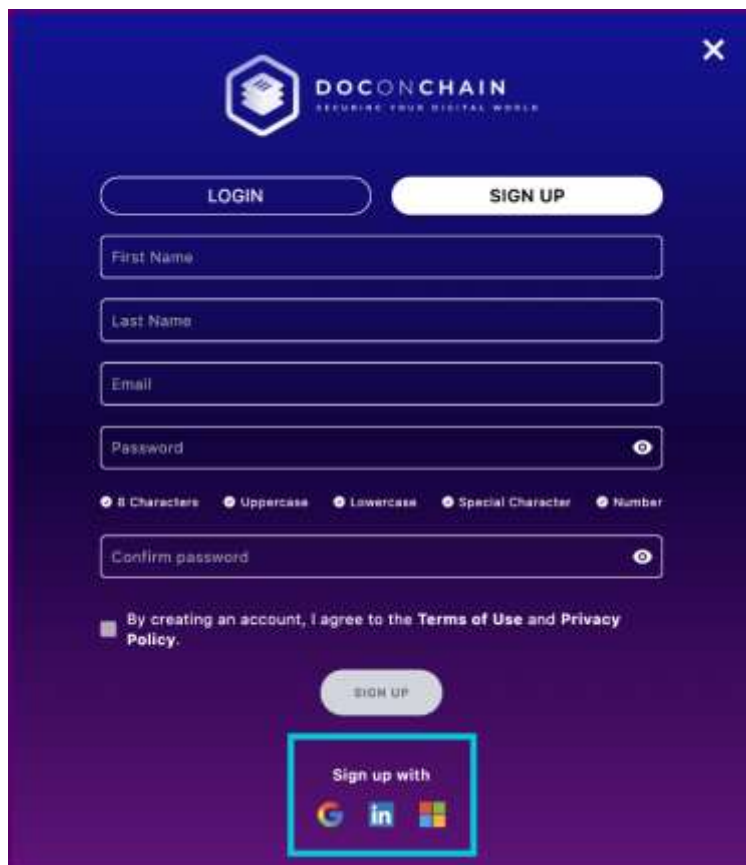
You may also click **RESEND CODE** if the initial code provided has expired or you have not yet received the email.

services and your account settings.

You now have access to the DOCONCHAIN platform



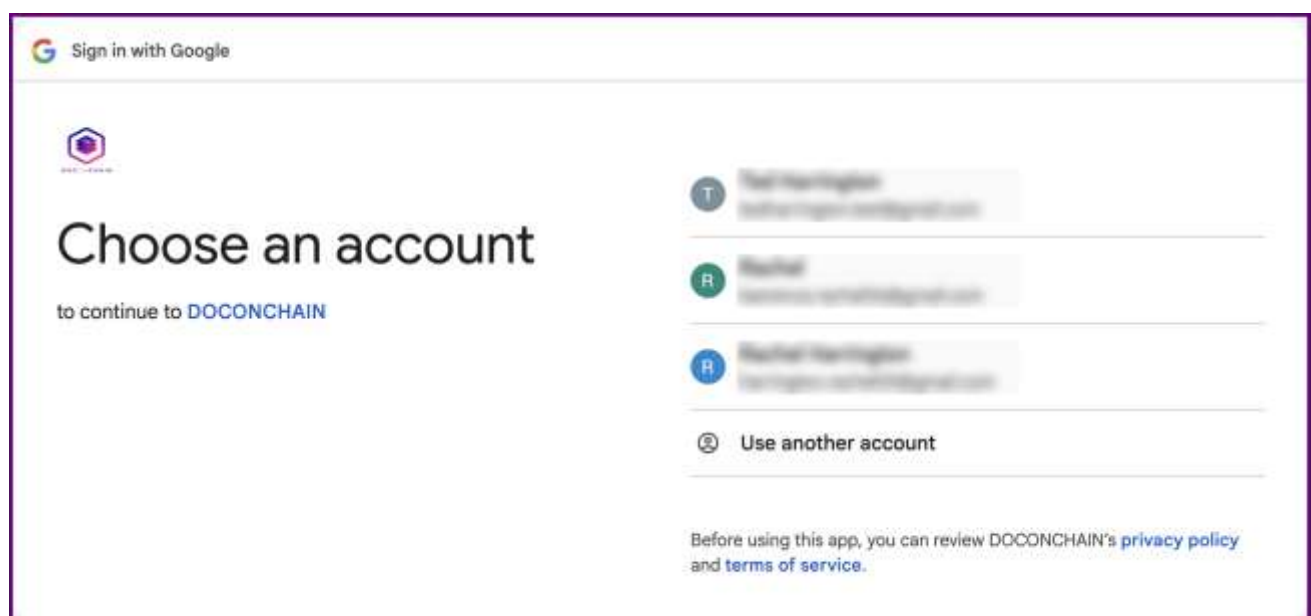
2.1.2. SOCIAL SIGN UP



The image shows the DOCONCHAIN sign-up form. At the top, there is a DOCONCHAIN logo and a close button (X). Below the logo are two buttons: "LOGIN" and "SIGN UP". The form contains several input fields: "First Name", "Last Name", "Email", "Password", and "Confirm password". The "Password" field has a strength indicator below it showing "8 Characters", "Uppercase", "Lowercase", "Special Character", and "Number". Below the "Confirm password" field is a checkbox labeled "By creating an account, I agree to the Terms of Use and Privacy Policy." At the bottom, there is a "SIGN UP" button and a "Sign up with" section containing icons for Google, LinkedIn, and Microsoft. The "Sign up with" section is highlighted with a red rectangle.

DOCONCHAIN aims to provide ease of access to its customers. Hence, to speed up the process, the user may also use their Google, LinkedIn or Microsoft Account to login or sign up.

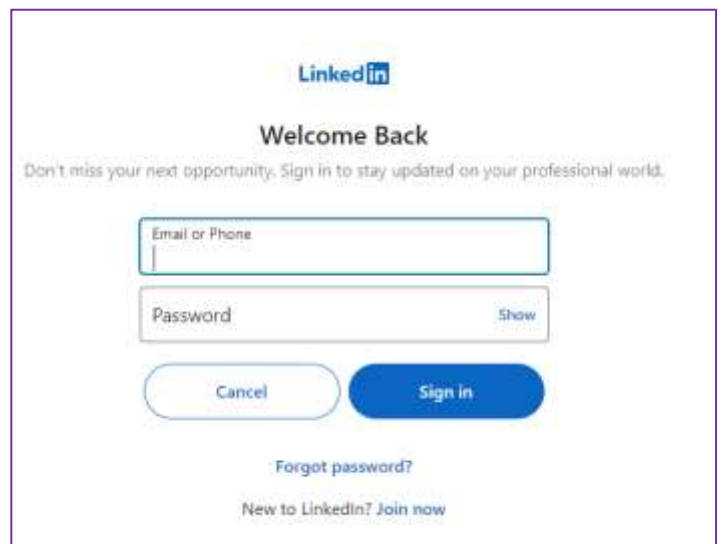
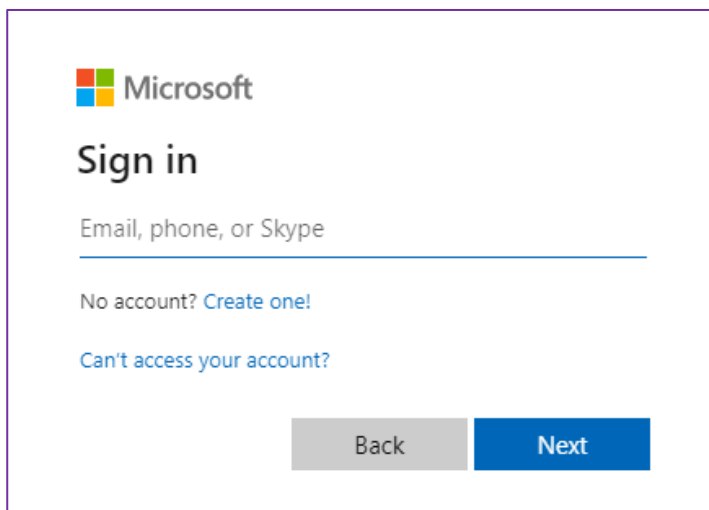
Google Login: Click on the Google logo to connect with a Google/Gmail account. You will be prompt to confirm your Google account details and connect your account to the DOCONCHAIN platform.



The image shows the Google "Sign in with Google" screen. At the top, there is a Google logo and the text "Sign in with Google". Below this is the DOCONCHAIN logo and the text "Choose an account to continue to DOCONCHAIN". On the right side, there is a list of accounts with circular icons and names. At the bottom, there is a link to "Use another account". Below the list of accounts, there is a link to "Before using this app, you can review DOCONCHAIN's privacy policy and terms of service."



LinkedIn Login: Click on the LinkedIn logo to connect with a LinkedIn account. You will be prompt to confirm your LinkedIn account details and connect your account to the DOCONCHAIN platform.

The image shows the LinkedIn login interface. At the top is the LinkedIn logo. Below it is the text "Welcome Back" and a sub-header "Don't miss your next opportunity. Sign in to stay updated on your professional world." There are two input fields: "Email or Phone" and "Password". The "Password" field has a "Show" link to its right. Below the input fields are two buttons: "Cancel" and "Sign in". At the bottom, there are two links: "Forgot password?" and "New to LinkedIn? Join now".The image shows the Microsoft login interface. At the top is the Microsoft logo. Below it is the text "Sign in". There is an input field for "Email, phone, or Skype". Below the input field are two links: "No account? Create one!" and "Can't access your account?". At the bottom are two buttons: "Back" and "Next".

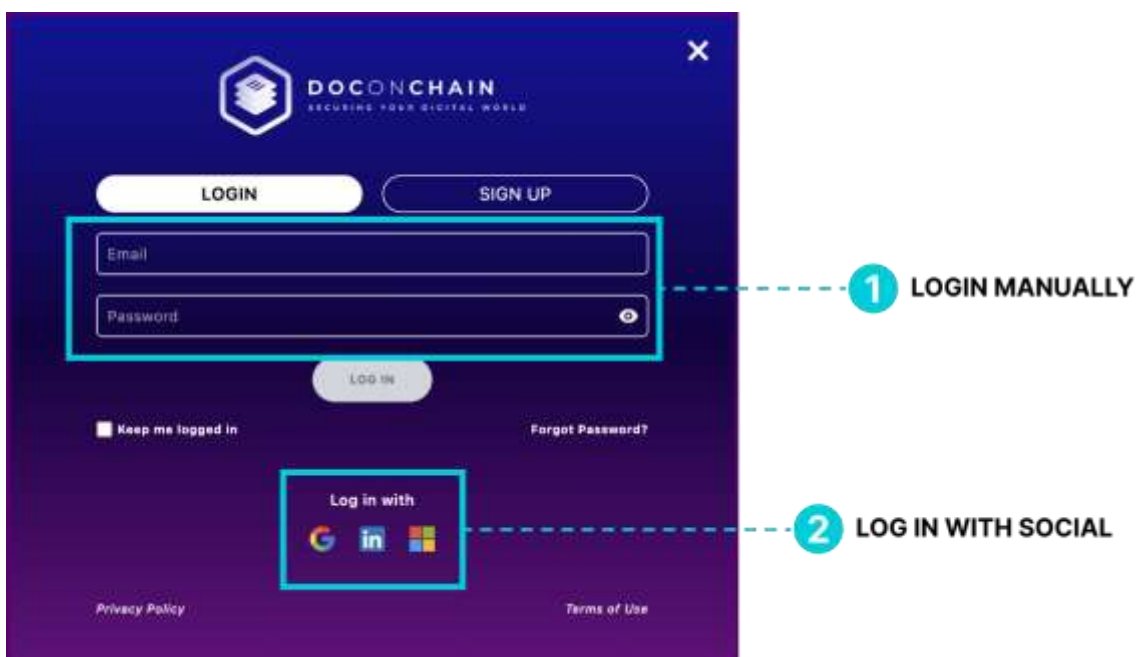
Microsoft Login: Click on the Microsoft logo to connect with a LinkedIn account. You will be prompt to confirm your Microsoft account details and connect your account to the DOCONCHAIN platform.

2.2. ACCOUNT SET UP

Before setting up your account, if you logout to your account, you can login again by clicking the LOGIN button.

The image shows a horizontal bar with the DOCONCHAIN logo on the left. On the right side of the bar are two buttons: "SIGN UP" and "LOGIN".

Once clicked, the **login modal** will show, where you can enter your email and password, if you sign up manually (1) or click the social icon that you use when signing up though social account (2)



After successfully logging in, you will now be able to set up your DOCONCHAIN account by accessing the My Account page. This section allows for profile updates, company details, security configurations, and digital identity setup, as well as signature and initials updates.

1. To go to your **My Account** page, click the profile avatar located at the top-right corner of the dashboard.
2. Once clicked, a dropdown window will appear showing your current account information, such as your full name, email address, plan type, and, if applicable, your job position and company name. It will also show other menus such as Billing, Account Settings, Organization (if applicable), and Log Out.
3. Upon clicking **Account Settings**, you will be taken to the **My Account** page where you can:
 - a. Edit your basic information
 - b. Update your company details
 - c. Set up your signature and initials.
 - d. Upload your digital certificate.
 - e. Turn on/off or remove Two-Factor Authentication (2FA)
 - f. Change email and password
 - g. Disconnect your social login

2.2.1. BASIC INFORMATION

The Personal Information section allows you to update your basic details. By default, the profile picture will be the initials of your first and last name. You may change this by using the update button, uploading, and editing your preferred photo (1). You can select your preferred title (Mr., Ms., or Mrs.) and modify your first name, middle name, and last name. Make sure to review your entries before saving (2).



The Company Details section displays your organization information, including the company name, industry, job title and, country. You can edit these fields as needed to keep your profile up to date. After making any changes, click 'Save Changes' to apply and confirm the updates (3).

The screenshot shows the 'My Account' page. At the top, there's a profile picture placeholder with a red 'x' icon and an 'UPDATE' button. Below it, the 'PERSONAL INFORMATION' section includes a title dropdown (None, Mr, Ms, Mrs), and text fields for First Name, Middle Name, and Last Name. The 'COMPANY DETAILS' section includes a text field for the company name (RIFLOW CORPORATION), a dropdown for the industry (Legal Services), a text field for the job title (Head of Operations), and a dropdown for the country (Philippines). A 'SAVE CHANGES' button is at the bottom right. Three numbered callouts point to the profile picture (1), personal information (2), and company details (3).

2.2.2. CHANGE EMAIL ADDRESS AND PASSWORD

If you log in/sign up manually, you will be able to change your email or password by navigating to Login information section

The screenshot shows the 'LOGIN INFORMATION' section. It has two input fields: 'Email' (with a green checkmark icon) and 'Password'. Each field has a 'CHANGE' button to its right. The email field contains the text 'john.doe@company.com' and the password field contains a masked password '.....'.

2.2.2.1. CHANGE OR MAINTAIN YOUR EMAIL ADDRESS

To change your email address, click the **change** button and a modal will prompt, where your password is pre-filled:

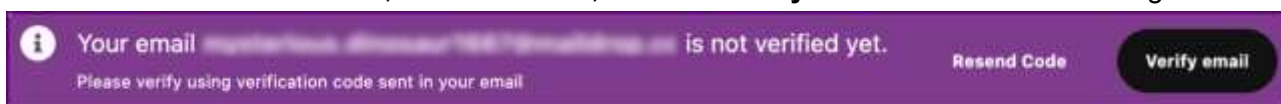
1. Enter your new email address



2. Click the **send code** (this button will be enabled once a valid email is entered).

The modal titled "Change Email Address" contains a close button (X) in the top right corner. It has three input fields: a password field with a strength indicator, a new email address field containing "email@domain.com", and a verification code field. Below the fields are "CANCEL" and "SEND CODE" buttons. A dashed line connects the "SEND CODE" button to a callout "2 SEND CODE". Another dashed line connects the new email address field to a callout "1 New Email Address".

3. A verification code will be sent to your new email address
4. Navigate to the purple banner you will see on the header of your DOCONCHAIN account and click "**Verify Email**" button
5. A modal will show, enter the code, and click **verify email** to confirm the change.



Note: Changing your email will affect where you receive document alerts and account notifications. Please ensure that the new address is active and accessible.

To keep your previous email, please ensure that you have not verified your new email address yet. In the login information section, just click the **undo changes** button above your email address, and it will show a modal confirming that you want to undo all the changes you've made. and your original email will be restored.

The "LOGIN INFORMATION" section shows an "Email" field with a red warning triangle icon. To the right of the field is a button labeled "UNDO CHANGES". Below the field is a light blue input area.

2.2.2.2. CHANGE YOUR PASSWORD

To change your password, click the **change** button, and an update password modal will prompt:

1. Enter your current password
2. Type your new password
3. Re-type your password
4. Click the **update** button (it will be enabled, once the password requirements are met)



The 'Update Password' modal contains three input fields and two buttons. Step 1 points to the 'Current password' field. Step 2 points to the 'New password' field. Step 3 points to the 'Confirm new password' field. Step 4 points to the 'UPDATE' button. Below the 'New password' field, there are five password requirements: 8 Characters, Uppercase, Lowercase, Special Character, and Number, each with a toggle icon.

2.2.3. DISCONNECT SOCIAL LOGIN

If you log in or sign up using your social login (Google, Microsoft, or LinkedIn), you can disconnect it and switch to email-based login:

1. Click the **disconnect** button.

The 'LOGIN INFORMATION' bar shows a Google login entry with the email 'jared@doconchain@gmail.com' and a 'DISCONNECT' button.

2. A modal will prompt, confirming the email address that will be used and informing you to update your password.

The 'Disconnect Google Login' modal displays the email 'jared@doconchain@gmail.com' and informs the user that a verification code will be sent to this email and that they will be asked to update their password afterwards. It includes 'CANCEL' and 'SEND CODE' buttons.

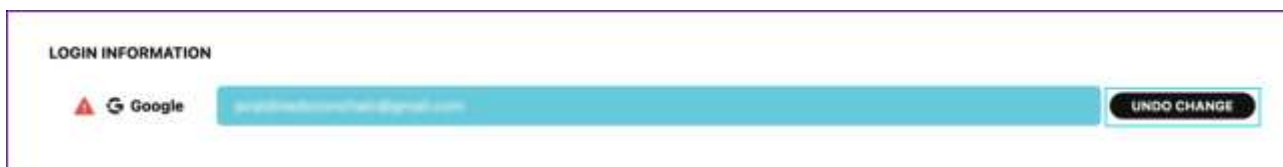
3. A verification code will be sent to your email address.
4. Navigate to the purple banner you will see on the header of your DOCONCHAIN account and click "**Verify Email**" button.



5. A modal will show, enter the code, and click **verify email** to confirm the change.
6. After verifying your email, the "**create new password**" modal will show; it will ask you to enter your new password and retype it to confirm.
7. Click the **SAVE** button (it will be enabled, once the password requirements are met).

Note: Your social login will be disconnected, and you will now use your email and password to access DOCONCHAIN.

To keep your previous social login, please ensure that you have not verified your new email address yet. In the login information section, just click the **undo change** button beside your email address; it will show a modal confirming that you want to undo all the changes you have made. Click to confirm, and your original login will be restored.

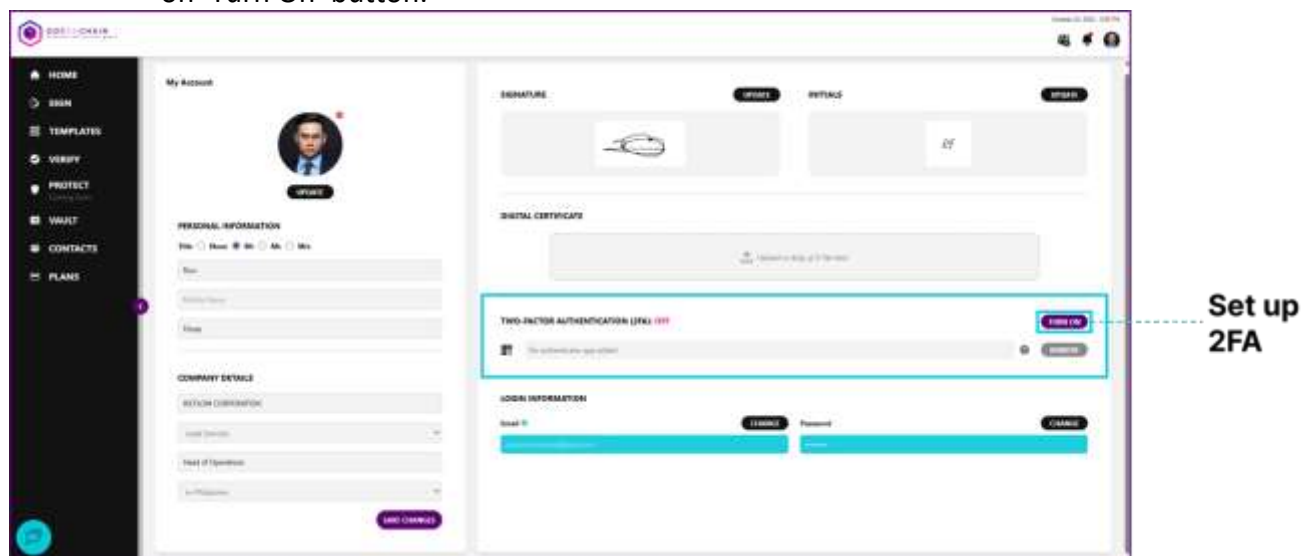


2.2.4. 2FA

For enhanced security, you can enable Two-Factor Authentication (2FA) in your account settings. This lets you add an extra layer of protection by requiring a verification code in addition to your password.

Enabling 2FA

1. On the Account settings page, in the Two-Factor Authentication section, click on 'Turn On' button.





2. A modal will appear with instructions to set up your 2FA.

SETUP AN AUTHENTICATOR APP

1. To enable two-factor authentication (2FA), you will need an authenticator app (e.g. Google Authenticator, Microsoft Authenticator, etc.) which you can download from your mobile app store.

2. With your authenticator app, scan the QR code below.

Can't scan the QR code?
Copy the key below into your authenticator app:
KSKG - E7IT - HZPW - KT2D - GSEA
Tap the code above to copy

3. Enter the 6-digit code from the same app:

123456

CANCEL VERIFY

Scan QR code

Enter Code from authenticator app

Verify Code

3. Open your preferred authenticator app (e.g. Google Authenticator, Microsoft Authenticator, etc.).
4. Scan the QR code using your authenticator app.
 - If you cannot scan the QR code, a code is provided to be pasted to your authenticator app.
5. The app will generate a 6-digit code linked to your account.
6. Enter the 6-digit code into the provided field.
7. Click Verify to complete the setup.
8. Once verified, your 2FA will be enabled for your account.

Disabling 2FA

1. On the Account settings page, in the Two-Factor Authentication section, click on 'Turn off' button.

My Account

PERSONAL INFORMATION

Signature

INITIALS

DIGITAL CERTIFICATE

TWO FACTOR AUTHENTICATION (2FA)

TURN OFF

TURN OFF 2FA

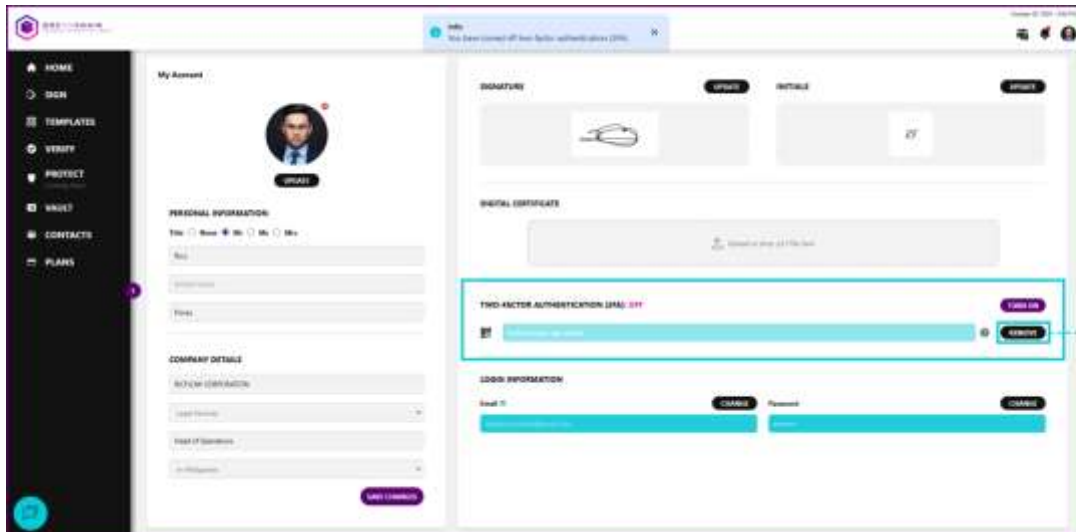
2. It will then prompt a modal to confirm the action.
3. Click on confirm to turn it off.



Note: Disabling 2FA will only turn it off, it will not remove the current authenticator app that was added.

Removing Authenticator app

1. On the same area, click on 'Remove' button. This will remove the current authenticator app connected to your account.



**Remove
Auth App**

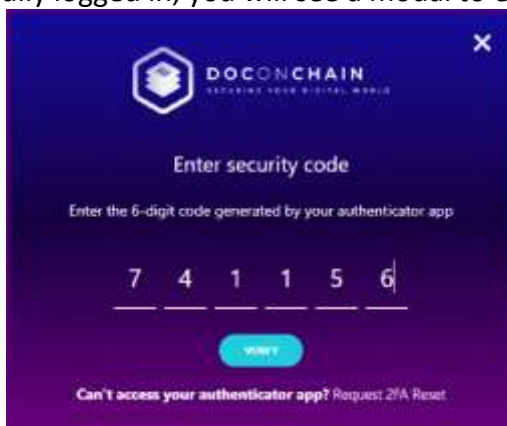
2. It will then prompt a modal to confirm the removal of the authenticator app.
3. Click on confirm to remove it.

Note: Removing the authenticator app will automatically turn off the 2FA. This will not delete the stored passcode in your authenticator app, please remove it manually to avoid confusion.

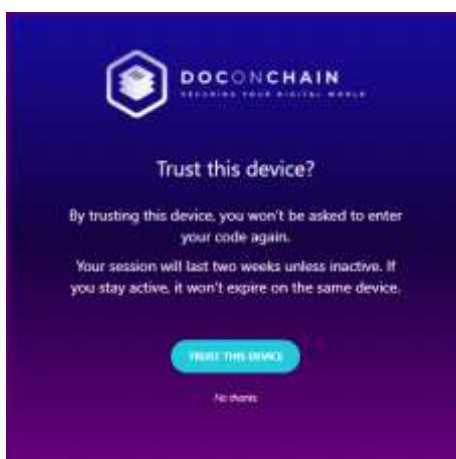


Logging in with 2FA

1. On the login modal, enter your email and password.
2. Once successfully logged in, you will see a modal to enter your security code.



3. Enter the security code from your authenticator app.
4. Click on verify to check the code.
5. Another modal will show asking if you would like to trust the current device.



- 'Trust this device' – this will save your session on the current browser and you will not be prompted to enter your code next time you login if you are active. Being inactive for two (2) weeks will ask for a security code again.
- 'No thanks' – you will be asked to enter your code again the next time you login on the same browser.

2.2.5. DIGITAL CERTIFICATE

The digital certificate is embedded into the document to provide offline authenticity verification with supported PDF viewers (Adobe, Edge, etc.). To upload and activate your own digital certificate:

1. Go to **Account settings** and navigate to the **Digital Certificate** section
2. Click on the upload area or drag your certificate file into the designated field (*supported file: .p12*)



3. After uploading, enter your certificate password and click **activate** once enabled. If you want to change or remove the certificate, just click the **remove** button.

4. Once activated, you may choose your certificate when signing a document. To know how, click [here](#).

2.2.5. SIGNATURE AND INITIALS SET UP

Apart from your digital documents, DOCONCHAIN also values and secures your information through blockchain technology. This includes your digital signature/s and initials. As part of your account set up, and before you proceed with creating projects, you need to configure your signature.

DOCONCHAIN allows users to save multiple marks for different types of documents (for personal or business use for example). Once a signature/initial is saved, it will be archived in the My Signature folder which can also be accessed in the Account Settings.

There are four (4) tabs on the 'set up your marks' modal, you can choose the type of signature or initials that you would be using.

1. **DRAW:** Update your signature manually by drawing on our designated box using your mouse, electronic pen (or finger on mobile).

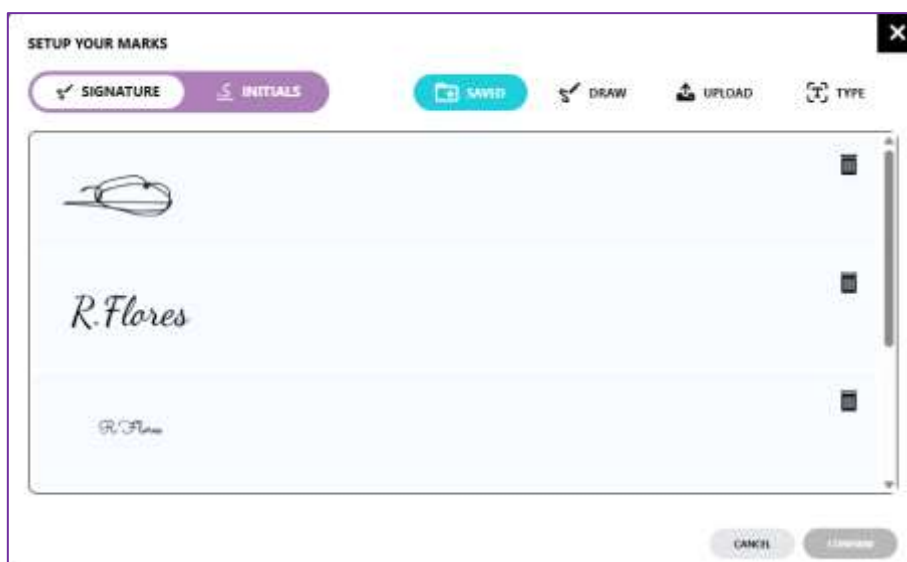
2. **UPLOAD:** Update your signature by uploading an image of it. This option supports photos in JPEG, PNG and JPG formats. Maximum file size is 2MB. Images with black text and white background are encouraged.



3. **TYPE:** Update by typing in your desired signature and using the preset fonts. You may also customize the font size using the option below.

My Signature Folder

DOCONCHAIN allows users to save multiple marks for different types of documents (for personal or business use for example). Once a signature/initial is saved, it will be archived in the My Signature folder which can also be accessed in the Account Settings.





This feature provides flexibility to users as well as saves time and effort in manually updating and changing signatures/initials during the project creation process. A user may be able to save the last five (5) signatures/initials in the said folder.





CHAPTER 3. DOC ORGANIZATION

3.1. OVERVIEW

DOCONCHAIN Organization allows you to create and manage virtual representations of your company or institution within our platform. This feature is particularly useful for:

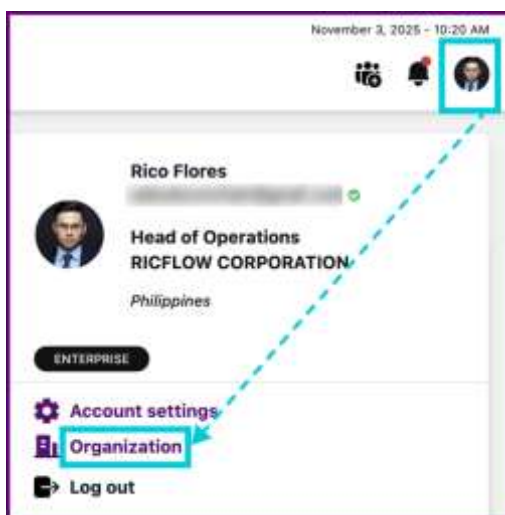
- **Managing departments and groups:** Organize your teams and assign specific roles and permissions.
- **Onboarding clients and subsidiaries:** Create separate organizational structures for external entities.
- **Branding your communications:** Enhance your company's reputation and trust with customized branding elements (emails, certificates and signing pages).

Benefits

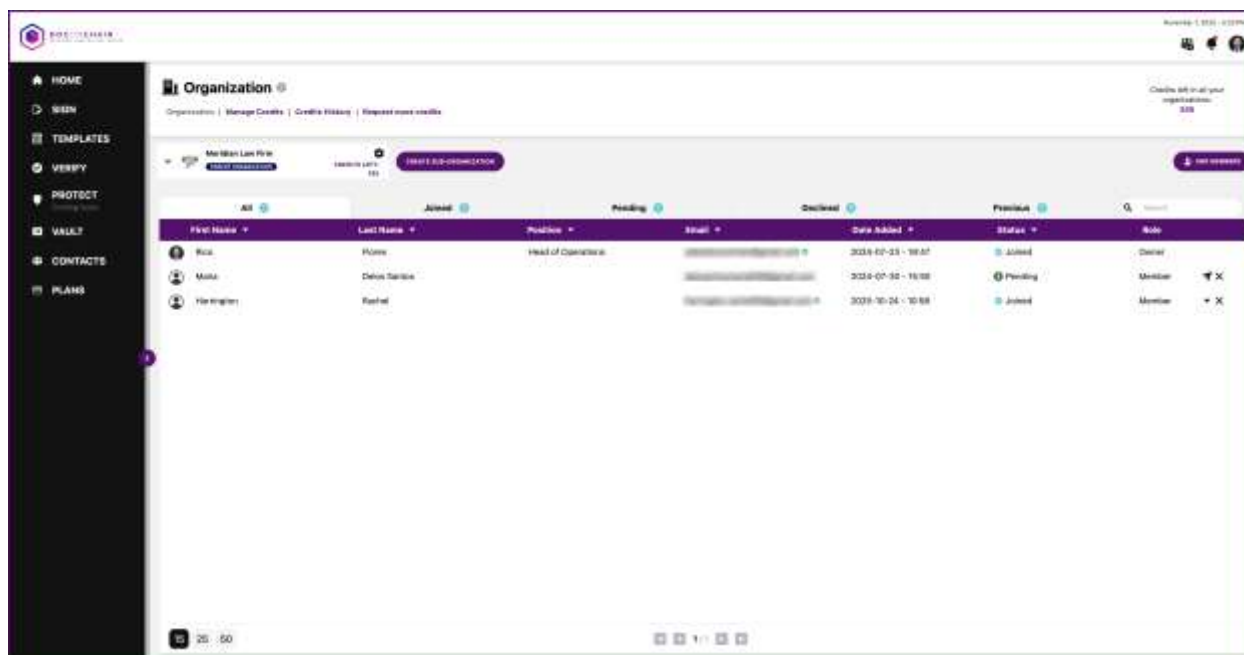
- **Improved organization:** Structure your teams and projects efficiently.
- **Enhanced credibility:** Establish a professional online presence.
- **Simplified document management:** Send signature requests with your company's branding.

The DOC Organization feature is available for **Business and Enterprise Plan accounts only**. To access and set up your DOC Organization details:

1. Click your profile picture at the top-right side of the page
2. Click the Organization Menu

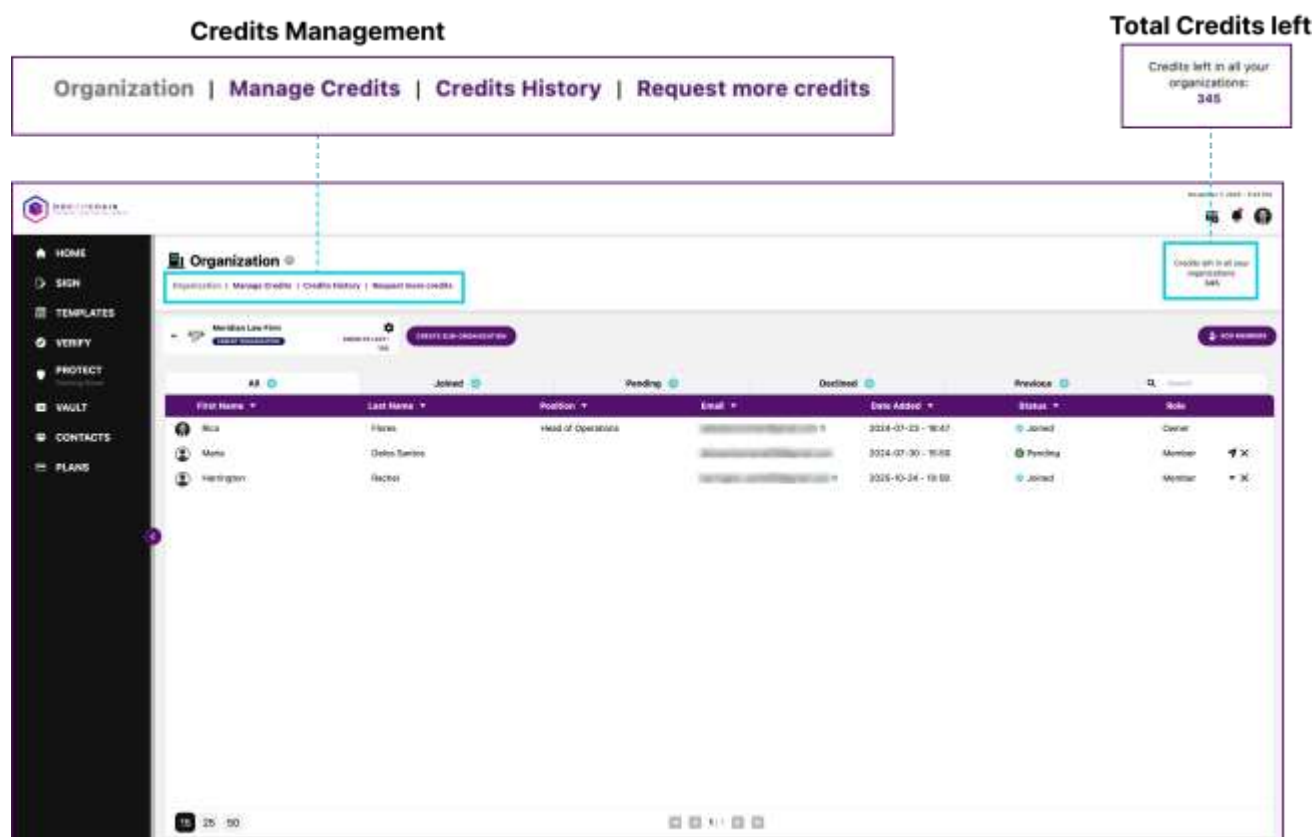


3. You will be redirected to your Organization page



3.2. ORGANIZATION SET UP

If you are under the **Enterprise Plan**, you will see tabs to manage your Organization, Manage Credits, Credits History, and Request more credits. You will also see all the credits left in your organizations.



These tabs are used to manage, monitor, and allocate document credits to your team. However, prior to managing your credits, you need to set up your Parent Organization and add Sub-Organizations.



3.2.1. DOC ORGANIZATION DETAILS

Under the Organization banner is the name of your Parent Organization or the main organization in your DOC account. On its right, is a gear (⚙️) icon for the settings along with the number of document credits left for this group. You may customize your organization to match your brand by updating the logo, website link, and other details by clicking the settings (⚙️) icon.



Organization Details

Organization Logo (rectangle) ? UPDATE

Organization Name ?

Logo Link ?

Other Details ?

Organization avatar (round) ? UPDATE

DELETE ORGANIZATION CANCEL SAVE

In setting up the Organization Details, the user can upload their organization or company logo in 2 sizes: one rectangular version for the full logo and a circle one for the avatar.



The rectangular logo will serve as the main logo which can be seen on the email headers for your document notifications as well as on the platform page where the recipient will access your document to either sign, view or approve.

This feature supports images in JPG, JPEG, and PNG file formats with maximum size of 1 MB. For best results, you may upload a picture (465 x 130 pixels) with a transparent or white background.

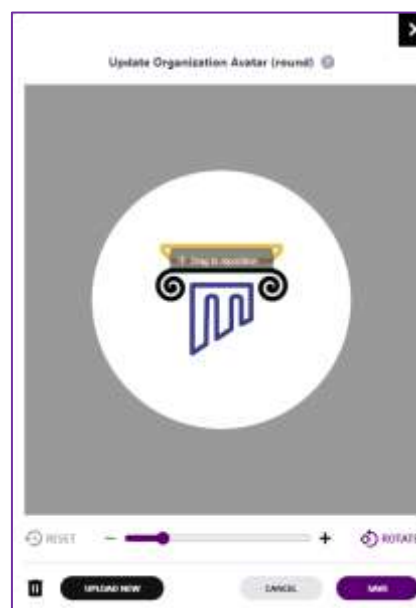
You may also drag to reposition your logo or use the options below to zoom in/out, rotate or delete your image.



The round image is for the avatar of your organization or company. This logo will appear on the issuer section of your signature document email notifications as well as on user organization invitations.

Likewise, this feature supports JPG, JPEG, and PNG file formats with maximum size of 1 MB. For best results, you may upload a photo with 300 x 300 pixels in white or transparent background.

You may also drag to reposition your logo or use the options below to zoom in/out, rotate or delete your image.



You may also start adding details about your company such as your Company/Organization name, logo link, which can be any URL you want your recipients to be redirected to once they click your logo on the email notifications or the branded document page. Other details about your organization can also be added such as but not limited to address, phone number, contact information, email address, etc.

Once you are done, click **SAVE** button to update your organization details across the platform.

3.2.2. ORGANIZATION INVITES (ADDING MEMBERS)

DOC Organization allows you to add users or seats for your members. If you are on the Business Subscription Plan, you may add a user by purchasing an additional seat to your organization. Once the seat is purchased, then you may start adding members into your organization.

Meanwhile, for the Enterprise plan account holders, users can be added for FREE since you are paying for document credits only. This means that once you have updated your DOC Organization details, then you may already proceed with adding members.

3.2.3. USER ROLES

DOC Organization offers three User Roles to manage access and permissions:

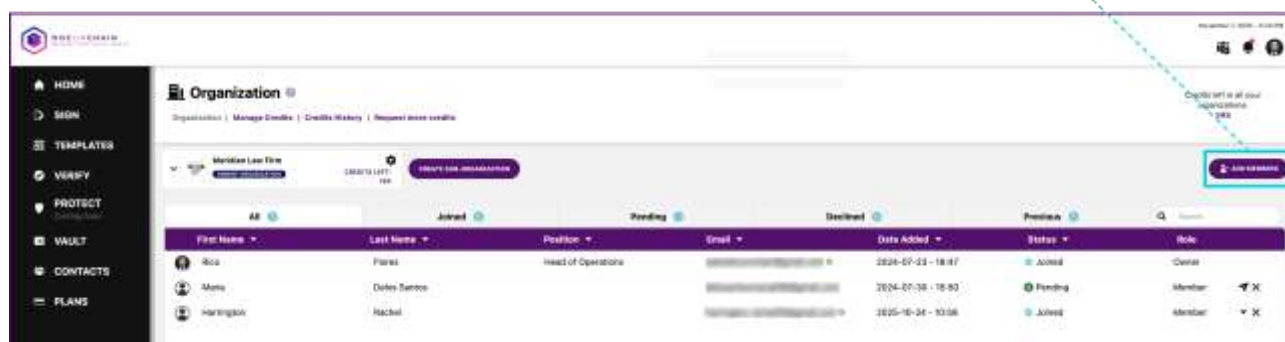
- **Owner:** The primary account holder responsible for billing, purchasing document credits, and managing organization members.
- **Admin:** Can add, remove, and manage members within the organization.
- **Member:** Has access to the organization but cannot manage other members.



This flexible role-based system allows you to control who can access and use your organization's resources. It will also help you distinguish the members of your organization from each other as well as restrict their access to your files and document credits.

1. To add a member, click on the ADD MEMBERS button found on the upper right corner of the DOC Organization page.

1 ADD MEMBERS



2. A modal will appear, where you can add multiple users in the same organization or sub-organization at once.
 - In **user's personal details section**, enter their first name, last name, and email address. Make sure that the email address is correct and existing.
 - In the **user's organization**, you may select a sub-organization where the user is part of. To know how to create a sub-organization, you may refer to [page 29](#).
 - In the **user's role**, you can assign a role to the user

User's personal details

User's Role

ADD MEMBERS

Complete the fields below, select the role level, and click add button to add the user to the list.

#	First name	Last name	Email	Organization	Role
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Meridian Law Firm"/>	<input type="text" value="Member"/>

User's organization

3. After inputting user details, click the ADD button once enabled, to include the user in the list. Once you are done, click confirm to send the invitation via email.



Users list

Add user to the list

ADD MEMBERS

Complete the fields below, select the role level, and click add button to add the user to the list.

#	First name	Last name	Email	Organization	Role	
	<input type="text" value="Sebastian"/>	<input type="text" value="Cruz"/>	<input type="text" value="sebastian.cruz@meridianlawfirm.com"/>	<input type="text" value="Meridian Law Firm"/>	<input type="text" value="Admin"/>	<input type="button" value="ADD"/> <input type="button" value="CLEAR"/>
1	Rachel	Harrington	<input type="text" value="rachel.harrington@meridianlawfirm.com"/>	Meridian Law Firm	Admin	<input type="button" value="REMOVE"/>
2	Ted	Harrington	<input type="text" value="ted.harrington@meridianlawfirm.com"/>	Meridian Law Firm	Member	<input type="button" value="REMOVE"/>
3	Christian	Lee	<input type="text" value="christian.lee@meridianlawfirm.com"/>	Meridian Law Firm	Member	<input type="button" value="REMOVE"/>

To send invites

4. All the users who have been invited will have a “pending” status. See the table below, for other status of all the users in the organization:

STATUS	DESCRIPTION
Joined	user accepted your invitation
Pending	user still not accepting your invitation
Declined	user refused to join your organization
Removed	user left or removed in your organization

DOCONCHAIN ensures that each user has appropriate permissions based on their roles within the organization. Here is the list of access rights for each member role in the Organization Settings, Management and Project Creation Process.

3.2.3.1. USER ROLES IN ORGANIZATION SETTINGS

User role	Create Master Org.	Edit Master Org. details and branding	Create sub-org. and Edit Org. details and branding	Manage and Transfer Credits	Access to Credits History
Master Org. Owner	Yes	Yes	Yes	Yes	Yes
Master Org. Admin	No	Yes	Yes	Yes	Yes
Master Org. Member	No	No	No	No	No
Sub-Org. Admin	N/A	N/A	Yes	Yes	Yes
Sub-Org. Member	N/A	N/A	No	No	No

*Higher Org. Admins have actions and views on sub-Organizations

*Sub-Org. users have no actions or view on higher Organizations



3.2.3.2. USER ROLES IN ORGANIZATION MANAGEMENT

User role	Add / Remove Members	Promote Member to Admin	Demote Admin to Member	Move Member to another Org.	Transfer Org. Ownership
Master Org. Owner	Yes	Yes	Yes	Yes	Yes
Master Org. Admin	Yes	Yes	Yes	Yes	No
Master Org. Member	No	No	No	No	No
Sub-Org. Admin	N/A	N/A	Yes	Yes	No
Sub-Org. Member	N/A	N/A	No	No	No

*Higher Org. Admins have actions and views on sub-Organizations

*Sub-Org. users have no actions or view on higher Organizations

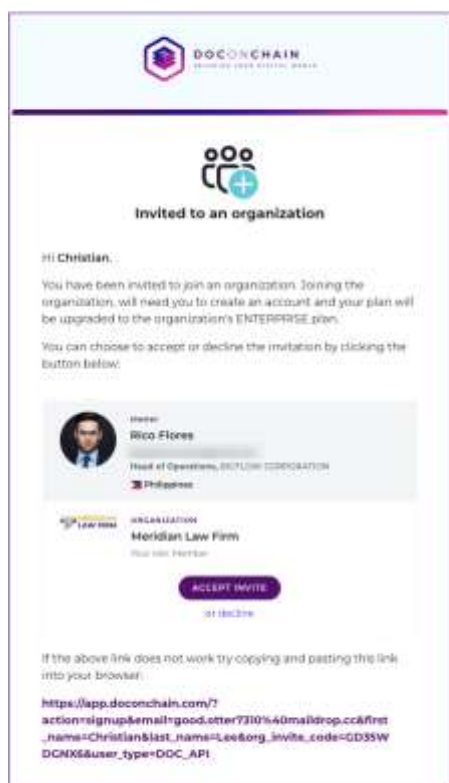
3.2.4. ACCEPTING ORGANIZATION INVITES

When invited to join a DOCONCHAIN Organization, you will receive an email notification. Please note that joining an organization will upgrade your plan to the host's plan (Business or Enterprise).

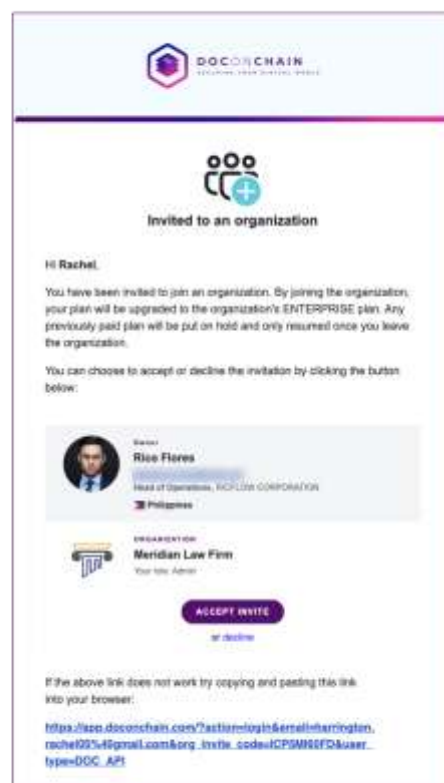
There are two (2) different types of organization invite email that the user will receive.

- For those unregistered users or who does not have an account in the platform, they will receive an email where they will ask to create an account after clicking the ACCEPT INVITE button.
- For those users who already registered, they will receive an email where they will be inform that their plan will be upgraded to the host's plan and their existing plan that they have paid for will be temporarily paused and will resume only after they leave the organization.

Organization Invitation



Unregistered user

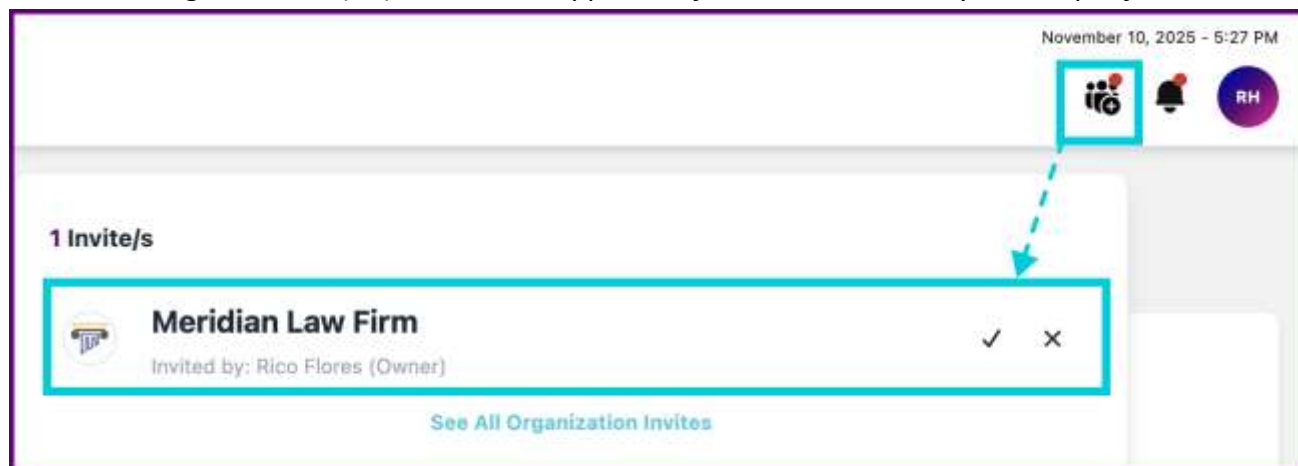


Registered user



There are two (2) ways to accept the Organization Invite.

1. By clicking the **accept invite** button on the email they will receive.
2. By logging in and navigating to the organization invite in their DOCONCHAIN account and then clicking the check (✓) icon. *This is applicable for users who already have a platform account.*

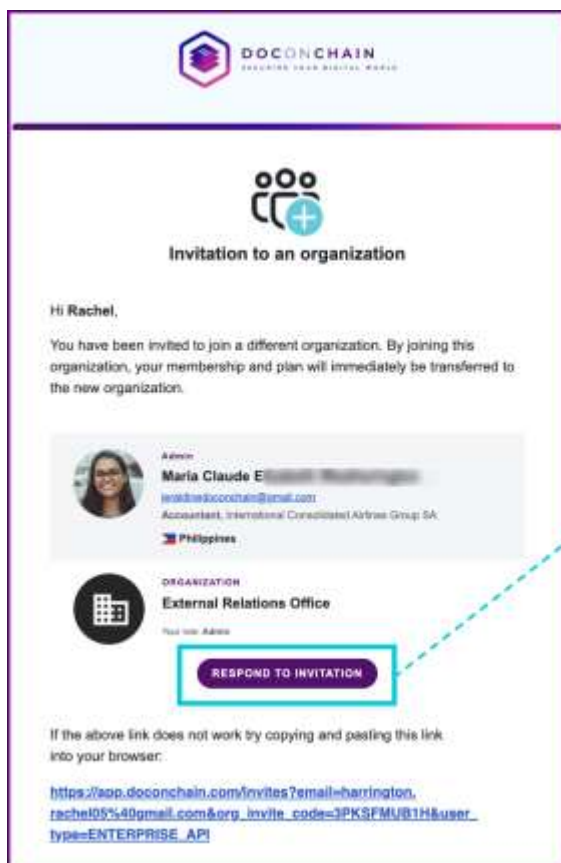


Upon accepting the invitation, your account will automatically be upgraded to the same plan as the organization owner. You can then begin collaborating with your team by sharing templates and/or document credits.

3.2.5. JOINING OTHER ORGANIZATION

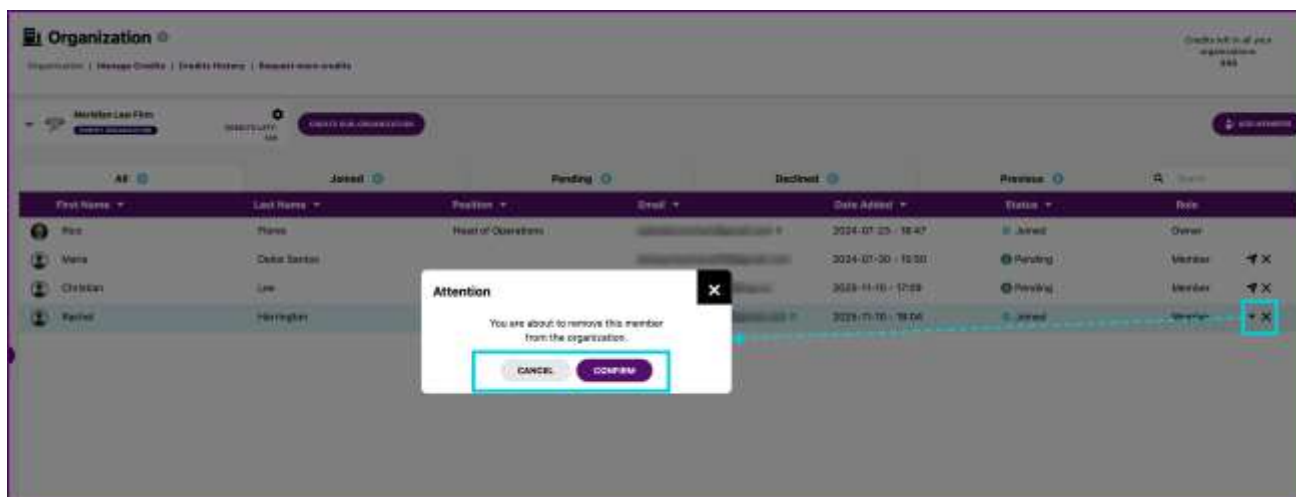
To prevent conflicts and ensure the security of digital documents, DOCONCHAIN limit the users to be part of a single organization at a time. If you wish to join another organization, you can do so by accepting an invitation. Please note that transferring to a new organization will also change your current plan.

Once “Respond to Invitation” is clicked, you will be redirected to the Organization invites page on your DOC Account where you have the option to either accept (✓) or decline (✗) .



3.2.6. REMOVING ORGANIZATION USER(S)

If a user of your DOC Organization left your company/team, you may remove them from your organization, by simply clicking the X button on their name in the Organization list and Confirm.



When a member is removed from your organization, they will receive an email confirmation. Their account will then automatically revert to the plan they had before joining your organization.



3.3. SUB-ORGANIZATION

DOCONCHAIN Enterprise plan users can also create Sub-Organizations, which are ideal for managing diverse teams, departments, or external entities like affiliate companies, partners or clients. These Sub-Organizations have the same functions and settings as the parent organization but can be distinguished using unique Sub Org types.

3.3.1. SUB-ORGANIZATION TYPES

Sub-Organization Types help differentiate other organizations from your parent organization. This makes it easier for members and administrators to identify and manage specific teams or departments, ensuring efficient collaboration and appropriate permissions.

DOCONCHAIN currently has four (4) Sub Organization Types:

- **Department** – Used for teams inside a company (Sales, Marketing, Finance, Legal, etc.). It can also inherit the branding of the parent organization
- **Client** – Used for external clients or customers
- **Partner** – Used for partners (suppliers, partners, etc.)
- **Company** – Used for related organizations (sister companies, agencies, etc.)

3.3.2. CREATING SUB ORGANIZATION

DOCONCHAIN allows you to create up to three levels of Sub-Organizations.

To create a Sub-Organization, you must be the owner or admin.

1. Click the “Create Sub-Organization” button found beside your organization name dropdown.
2. A modal will pop up where you may input the information for your Sub-Organization. These include the Main Logo and Avatar images as well as the Org name, logo link, and other details.
3. On the parent organization dropdown, you may choose where to include the new sub-organization
4. To add your sub-org logo, you may refer to [page 21](#).
5. Click the Sub-organization type dropdown to choose where the sub-org belongs to:
 - a. For **Department Type**, you have the option if you want to inherit the branding of your parent organization. It is checked by default, but if you want to upload your own branding, you may do so, by unchecking the checkbox and upload your own logo.



Create Sub-organization

☒ inherit parent organization branding

Sub-organization Logo (rectangle) **UPDATE**

Sub-organization avatar (round) **UPDATE**

Logo Link
 www.docmeridianlawfirm.ph

Parent Organization
 Meridian Law Firm

Organization Name
 Organization name

Other Details
 2279 G Tuazon, Manila, Metro Manila
 Tel: 028884 9555

Organization Type
 Department

CANCEL **SAVE**

- b. For **Client, Partner, and Company Type**, you can upload the organization own logo

Create Sub-organization

☐ inherit parent organization branding

Sub-organization Logo (rectangle) **UPDATE**

Sub-organization avatar (round) **UPDATE**

Logo Link
 Logo Link

Parent Organization
 Meridian Law Firm

Organization Name
 Organization name

Other Details
 Other Details

Organization Type
 Client

CANCEL **SAVE**

6. Once done, you may click **SAVE** once enabled and you will be prompted to the Sub-Organization page where you can now start adding members into.

3.3.3. UPDATING USER'S ROLE OR ORGANIZATION

If you wish to move user from one org to another, or would like to promote a member to an Admin or vice versa, you can click on the dropdown arrow beside their Organization Role and select the action that you wish to take. The dropdown option will depend if you are the owner or the admin and the user's role



Mentor Law Firm							
CREATE SUB-ORGANIZATION							
All Joined Pending Declined Previous							
First Name	Last Name	Position	Email	Date Added	Status	Role	
Rico	Flores	Head of Operations	ricoflores@mentorlaw.com	2024-07-23 - 16:47	Joined	Owner	
Maria	Deves Santos		maria@mentorlaw.com	2024-07-30 - 16:58	Pending	Member	
Christian	Lee		christian@mentorlaw.com	2025-11-10 - 17:09	Pending	Member	
Rachel	Harrington		rachel@mentorlaw.com	2025-11-10 - 18:04	Joined	Member	

DROPDOWN OPTIONS

ADMIN	MEMBER
<div>Demote to Member</div> <div>Make Owner</div> <div>Move To Another Organization</div>	<div>Promote to Admin</div> <div>Make Owner</div> <div>Move To Another Organization</div>

OWNER dropdown view in main organization

<div>Demote to Member</div> <div>Move To Another Organization</div>	<div>Promote to Admin</div> <div>Move To Another Organization</div>
---	---

OWNER dropdown view in sub-organization and ADMIN dropdown view in their organization

3.3.4. DELETING ORGANIZATION

If you wish to delete an organization:

1. Click the settings (⚙️) icon beside the name of organization you want to delete
2. The Organization Details modal will appear, navigate to the **DELETE ORGANIZATION** button, and click it.
3. A delete confirmation modal will show, you must read the content of the modal as it will depend on whether you are deleting the main or sub-organization

MAIN ORGANIZATION

DELETE ORGANIZATION ✕

By deleting this organization, all members will be removed and their account will be transferred to a Free plan.

Type "DELETE" to proceed.

CANCEL

DELETE

SUB ORGANIZATION

DELETE SUB ORGANIZATION ✕

Deleting the sub-organization will also delete all of its sub-organization admins and members. Do you wish to proceed?

Type "DELETE" to proceed.

CANCEL

DELETE

4. Type **DELETE** in the text box then click **DELETE** button. The organization will now be deleted



3.3.5. MANAGING DOCUMENT CREDITS

For **Enterprise Plan account users**, the number of projects that can be created depends on the document credits your organization or sub-organization has.

Organization Owner and Admins can access the Manage Credits and allocate credits to their sub-organization. They can also export the credit consumption history of the specific organization and will also see the remaining credits in each organization.

To allocate credits:

1. Click the **Manage Credits** tab.
2. Navigate to the **Allocation** column and click the input field and type the number of credits you want to allocate on that selected organization.
3. If you have sufficient credits, the transfer (🔄) icon will show, click it to transfer the credits.

Organization Name	Organization Type	Credits Left	Allocation	Actions
Merrill Lee Firm	Private Organization	100 / 142	0	🔄
Accounting Department	Sub-Organization	39 / 30	28	🔄
Payroll	Sub-Organization	1	0	🔄
Admin	Sub-Organization	48 / 115	0	🔄
External Relations Office	Sub-Organization	28	0	🔄
Human Resources	Sub-Organization	28	0	🔄
Internal Affairs Office	Sub-Organization	18	0	🔄
Marketing	Sub-Organization	8	0	🔄
ES& Foundation, Inc	Sub-Organization	10 / 10	0	🔄
Sales	Sub-Organization	6 / 12	0	🔄
Sales Team A	Sub-Organization	6	0	🔄
ABC Company	Sub-Organization	30 / 30	0	🔄

To export the credit consumption history:

1. Click the export (📄) icon.
2. The .csv file will be generated and will be sent to your account email.

You may also monitor the credit usage of your Organization through the Credit History and/or sort out the members of your organization using the tabs above.



Credits History

Credits left in all your organizations: 228

Organization | Manage Credits | Credits History | Request more credits

Performed by	Sent by	Received by	Transaction Type	Credits	Date and Time
Rico Flores	MP Mendrian Law Firm	Admin	ALLOCATION	→ 3	2025-11-13 - 16:42
Rico Flores	MP Mendrian Law Firm	Sales	ALLOCATION	→ 60	2025-11-13 - 16:18
Rico Flores	Admin	External Relatio...	ALLOCATION	→ 1	2025-11-12 - 18:12
Rico Flores	Accounting Depart...	Payroll	ALLOCATION	→ 9	2025-11-12 - 16:53
Rico Flores	MP Mendrian Law Firm	Admin	ALLOCATION	→ 60	2025-11-11 - 16:16

Please note that members do not have any access to Document Credit allocation/Purchase in an organization. If you wish to purchase more credits, you may click the Request more credits option and you will be redirected to our contact us page (www.doconchain.com/contact-us) or simply reach out to your DOCONCHAIN Point of Contact (POC).

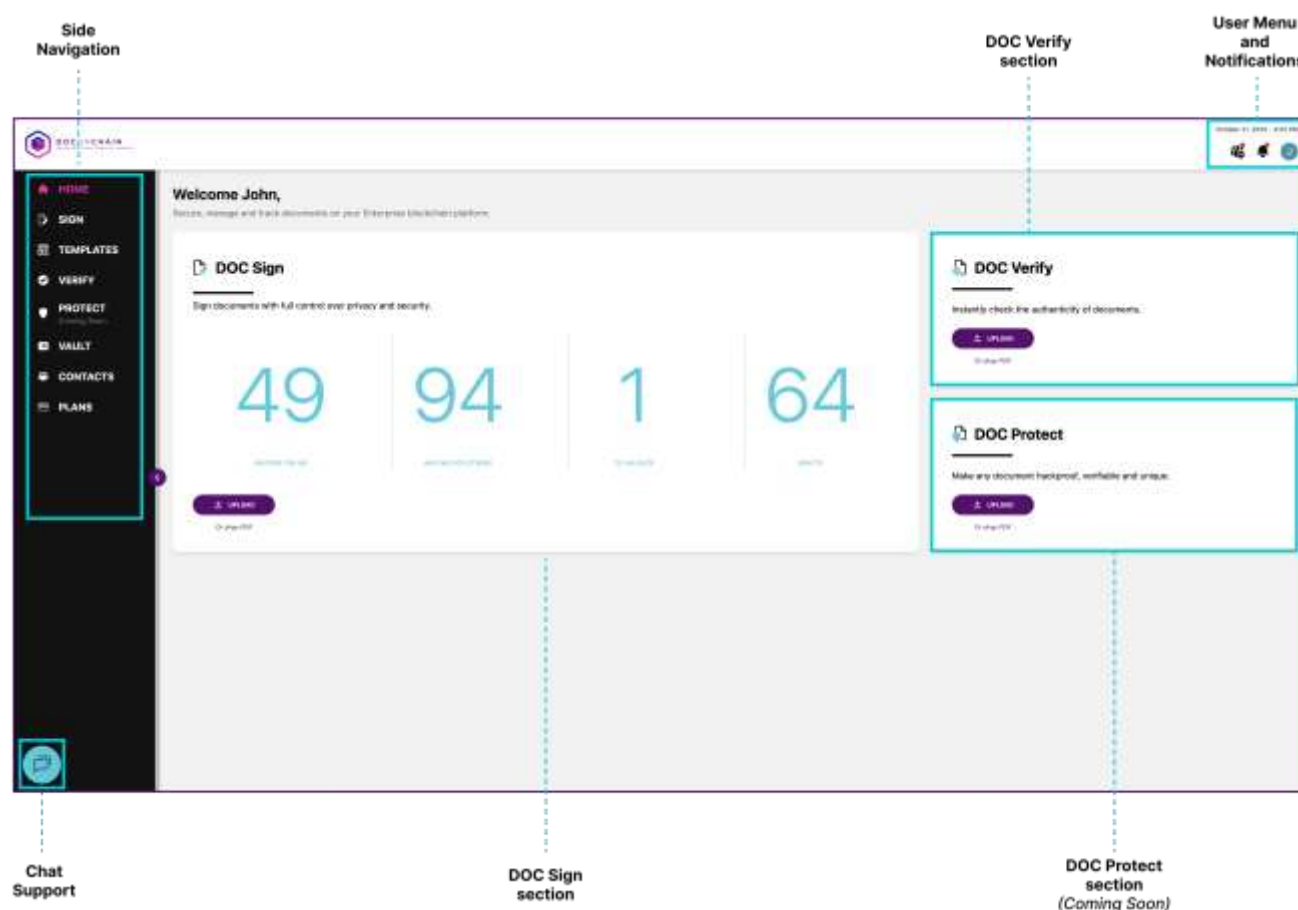


CHAPTER 4: USER INTERFACE

DOCONCHAIN is designed with simplicity and ease of use in mind. Our intuitive interface makes it easy for users of all technical backgrounds to navigate our platform and leverage the power of digital signatures. By prioritizing a user-friendly experience, we aim to streamline your workflow and help you achieve your goals efficiently.

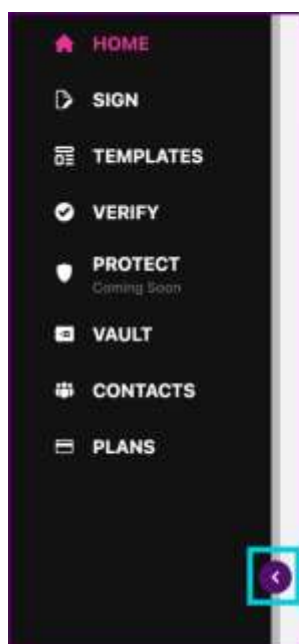
4.1 HOME PAGE

The DOC Home Page provides a quick access to essential features like the DOC Sign Dashboard, DOC Verify, and the upcoming DOC Protect. You will also find various buttons for different functionalities and a convenient side panel where all DOC Solutions are easily accessible as well as an icon for the chat support.





4.1.1. SIDE NAVIGATION



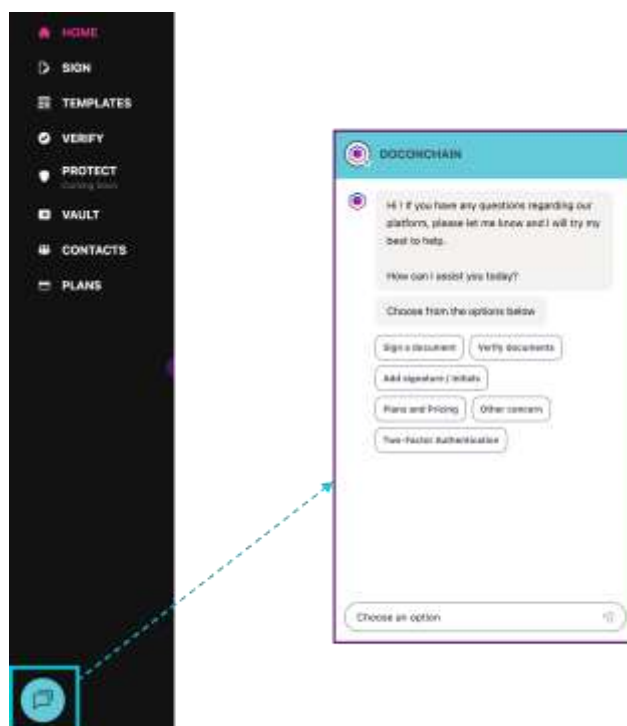
The side navigation provides quick access to DOCONCHAIN's core features such as SIGN, TEMPLATES, VERIFY, PROTECT, and VAULT. It also includes CONTACTS and PLANS.

The side navigation can also be maximized or minimized using the arrow button to give a much bigger window or space for working.

Expand / Collapse
button

4.1.2. CHAT SUPPORT

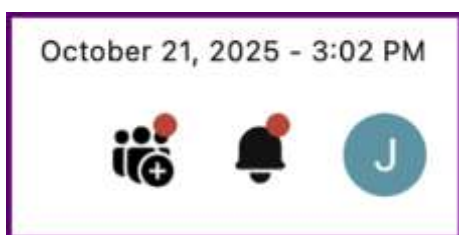
DOCONCHAIN puts customer support on top of its priorities. Our team of experts are always ready to provide help and assistance to our users through different means (email, chat, and/or call). One fast way to reach out is through our live Chat Support on your DOC Account, which can be found at the bottom part of the Side Panel.



The live chat support has preset options for frequently asked questions (FAQ) or other concerns which will be addressed directly by our support team.



4.1.3. USER MENU AND NOTIFICATIONS



Located at the top-right corner of the dashboard, the User Menu & Notifications panel provides access to account profile and settings; email and organization invite notifications, organization access, billing, and logout, along with a timestamp for reference.

4.1.4. DOC SIGN SECTION

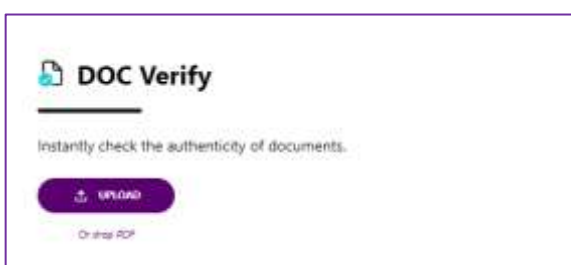
The DOC Sign Dashboard previews the number of all the active documents on a user's account. These include the files that are waiting for your signature, the ones you sent out for signature, documents for manual validation and your drafts.



These columns also serve as a shortcut to the list of documents under the same category, which can be found in the DOC Sign page. Once clicked, you will be redirected to the actual list of files for further checking or accessing.

You can also start working on a project by dragging and dropping a document on the DOC Sign Dashboard or by clicking the upload button found at the lower left side.

4.1.5. DOC VERIFY SECTION



You can also start verifying and checking the authenticity of your signed documents on the DOC Verify shortcut found at the home page.



4.1.6. DOC PROTECT

Our DOC Protect, designed to enhance the security and integrity of documents through advanced protection measures will be launched soon.





CHAPTER 5: FEATURES AND FUNCTIONALITIES

5.1. DOC SOLUTIONS OVERVIEW

DOCONCHAIN is a leading provider of adaptive, scalable, and fully customizable blockchain solutions designed to streamline the management, exchange, and traceability of digital documents for enterprises and government agencies. Through extensive testing across various industries, including legal, real estate, banking, government, and international institutions, we have developed a robust, hack-proof infrastructure that delivers efficient and reliable solutions.

Our cloud-based platform offers seamless access from any device, empowering businesses to simplify their document signing processes and enhance security. Our standalone digital signature platform offers five key solutions to help you manage, protect, and track your documents effectively.

5.1.1. SYSTEM REQUIREMENTS

DOCONCHAIN is compatible with most modern web browsers, including Google Chrome, Mozilla Firefox, Safari, and Microsoft Edge. Users can expect a smooth and reliable experience across these browsers. Our platform supports the latest stable release of the following:

STATUS	MINIMUM	RECOMMENDED
Supported Browser	Google Chrome: Latest version Mozilla Firefox: Latest version Safari: Latest version (for macOS/iOS) Microsoft Edge: Latest version	Google Chrome: Latest version Mozilla Firefox: Latest version Safari: Latest version (for macOS/iOS) Microsoft Edge: Latest version
Screen Resolution	1366 x 768	1920 x 1080



5.2. DOC SIGN

DOC Sign is a new generation of trusted digital signature solution included in DOCONCHAIN's Solutions suite. It uses the power of blockchain with signer authentication and custom workflows for signature and approval. Digital signatures can be used when there is a need to sign and send contracts or documents to clients, customers, or someone.

DOC Sign also allows to request or collect signatures from people within your organization. With DOC Sign, document signing is secure, quick, easy, and completely reduces the need for traditional paper works and wet ink signatures.

No documents will be printed, scanned, or faxed with DOC Sign. You can do the whole process in our paperless solution.

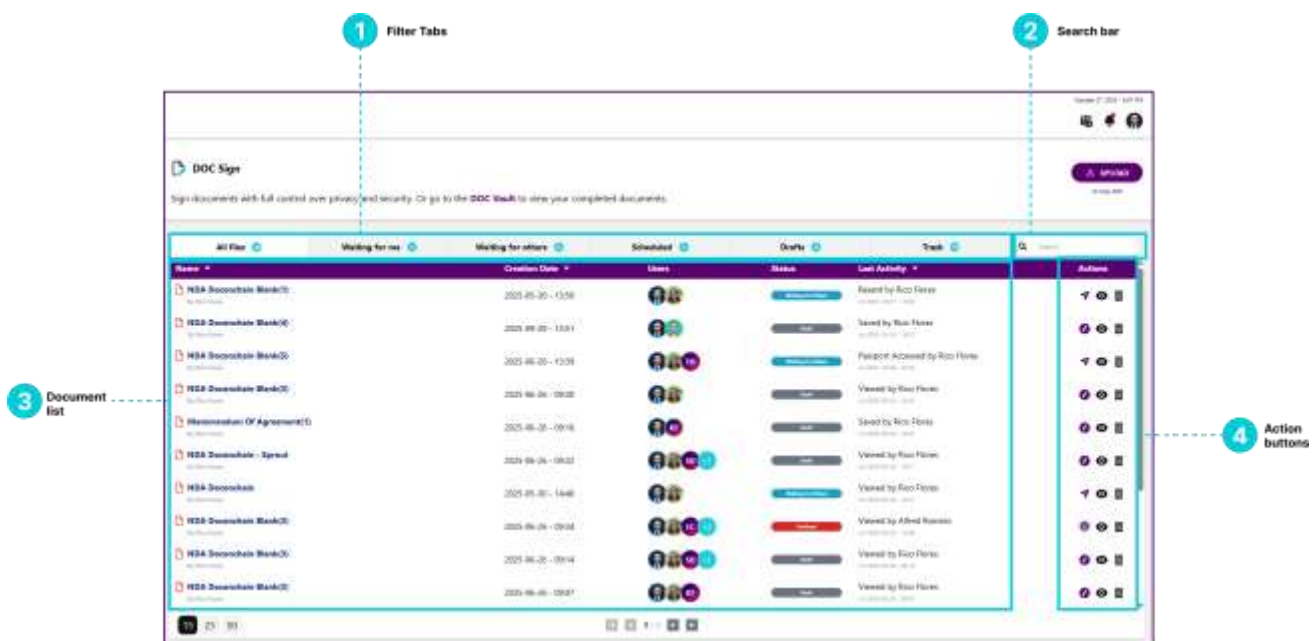
5.2.1. DOC SIGN PAGE

The DOC Sign Page displays all active documents on your DOCONCHAIN account. This includes projects you have created and sent for signature, as well as documents awaiting your signature, approval, or validation.

You may sort out the documents using the tabs **(1)** All Files, Waiting for me, Waiting for others, Scheduled, Drafts, Trash. The **(2)** search tab helps you to look for specific document in your DOC Sign page based on the file name.

The list of documents can be found on the main area, this can be rearranged based on **(3)** Name, Creation Date, Users, Status, and Last Activity.

The **(4)** Action buttons give you options on the actions that you may do with each document. These include editing, viewing, resend, validate, and delete.

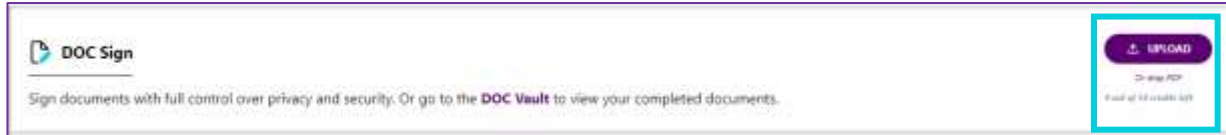




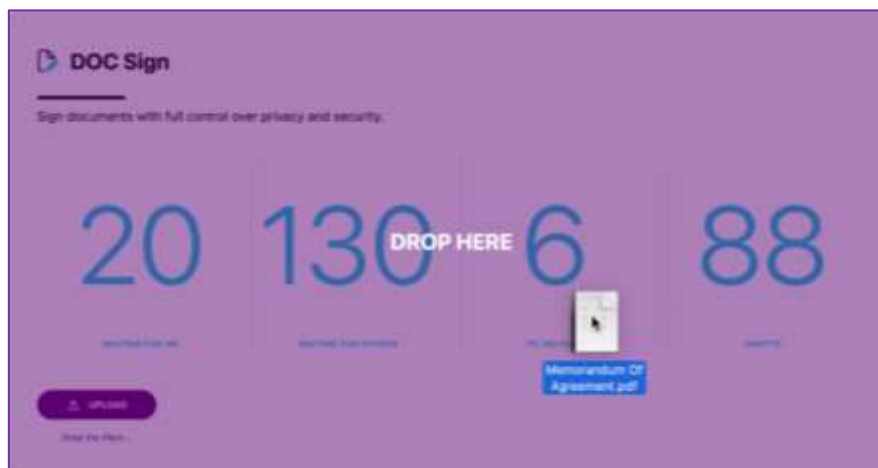
5.2.2. PROJECT CREATION

5.2.2.1. UPLOADING A DOCUMENT

There are two (2) ways to upload a document on DOC Sign. First is by uploading a file using the upload button on the DOC Sign Page or at the DOC Sign Dashboard on the homepage



The second one is by using the drag-and-drop option on the DOC Sign Page or on the DOC Sign Dashboard at the Homepage.

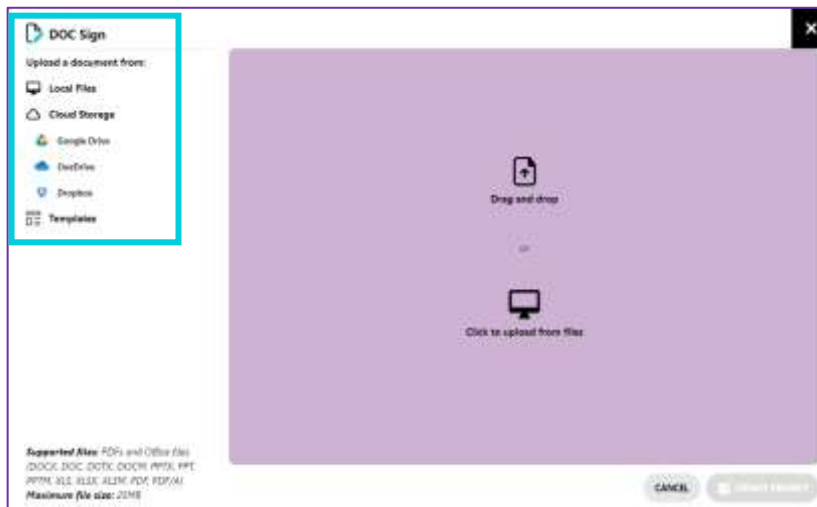


Supported files: PDFs and Office files (DOCX, DOC, DOTX, DOCM, PPTX, PPT, PPTM, XLS, XLSX, XLSM, PDF, PDF/A)

Maximum file size: 25MB.



If Upload Button is used, a modal will appear to allow users to upload document from your chosen storage.



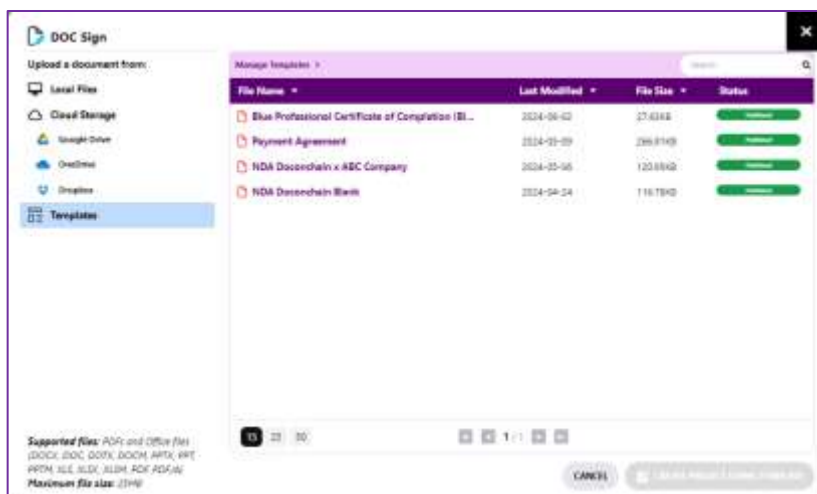
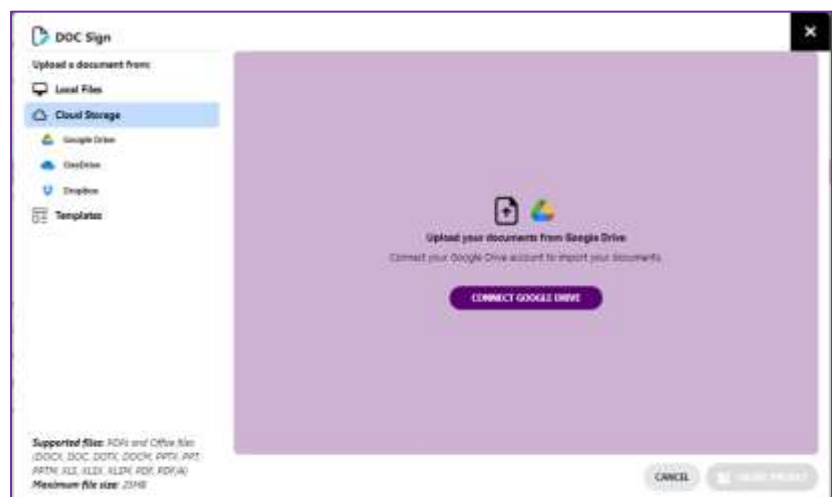
Local Files: These are the files in your local storage or device

Cloud Storage: These are the files in your cloud or online storage such as Google Drive, OneDrive and Dropbox

Templates: These are the files that you uploaded and saved in the Templates of your DOC Account

You may also use the drag-and-drop option in this modal.

If Cloud storage is selected, you will be asked to connect to your preferred file location.



Templates folder shows all your published documents.



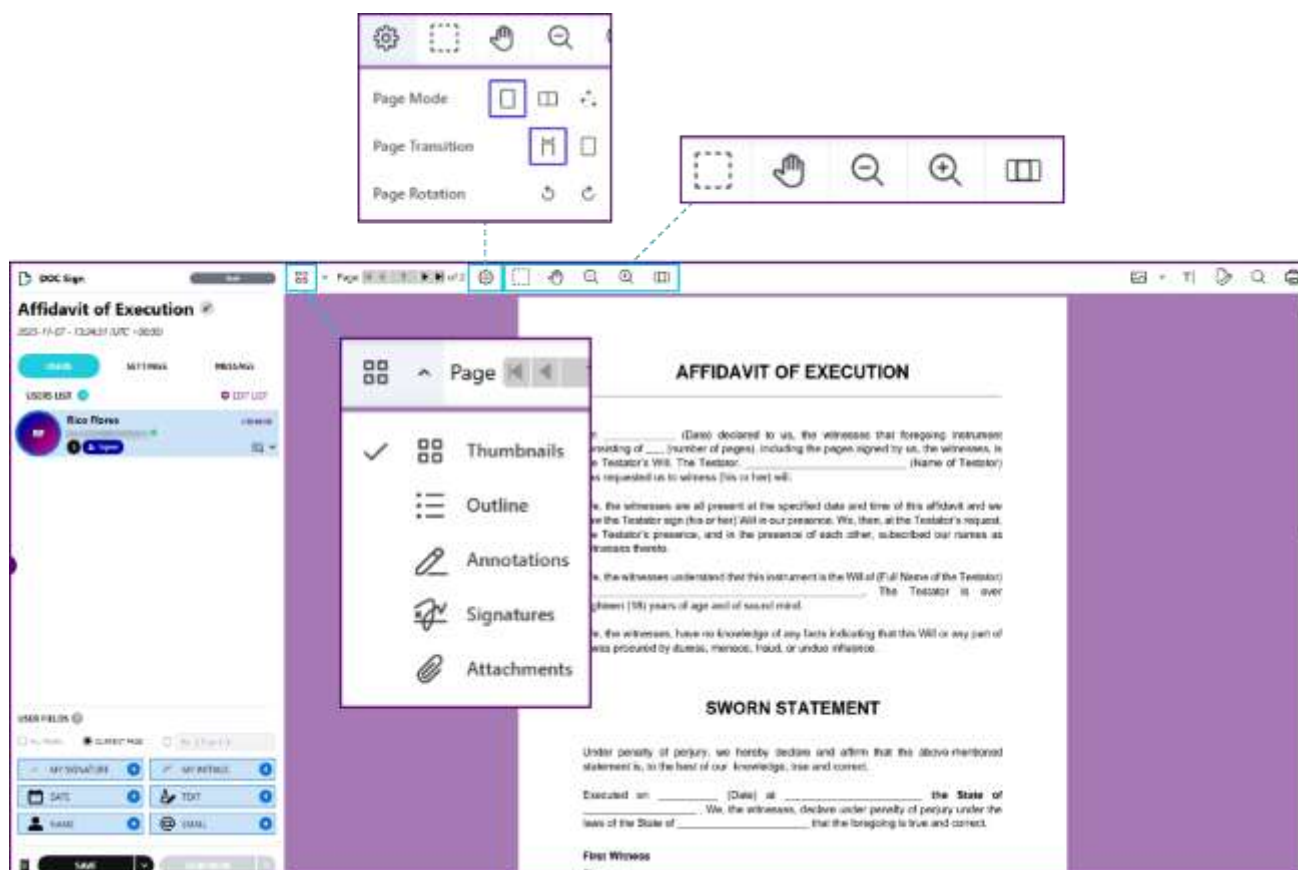
Once file is uploaded, you can either **delete** and re-upload a new document or **proceed with the project creation**.



5.2.3. DOCUMENT BASIC EDITING TOOLS

DOCONCHAIN offers a range of customization options and basic editing tools, allowing you to fine-tune your documents before sending them out. This flexibility ensures that your documents are well-prepared and meet your specific needs.

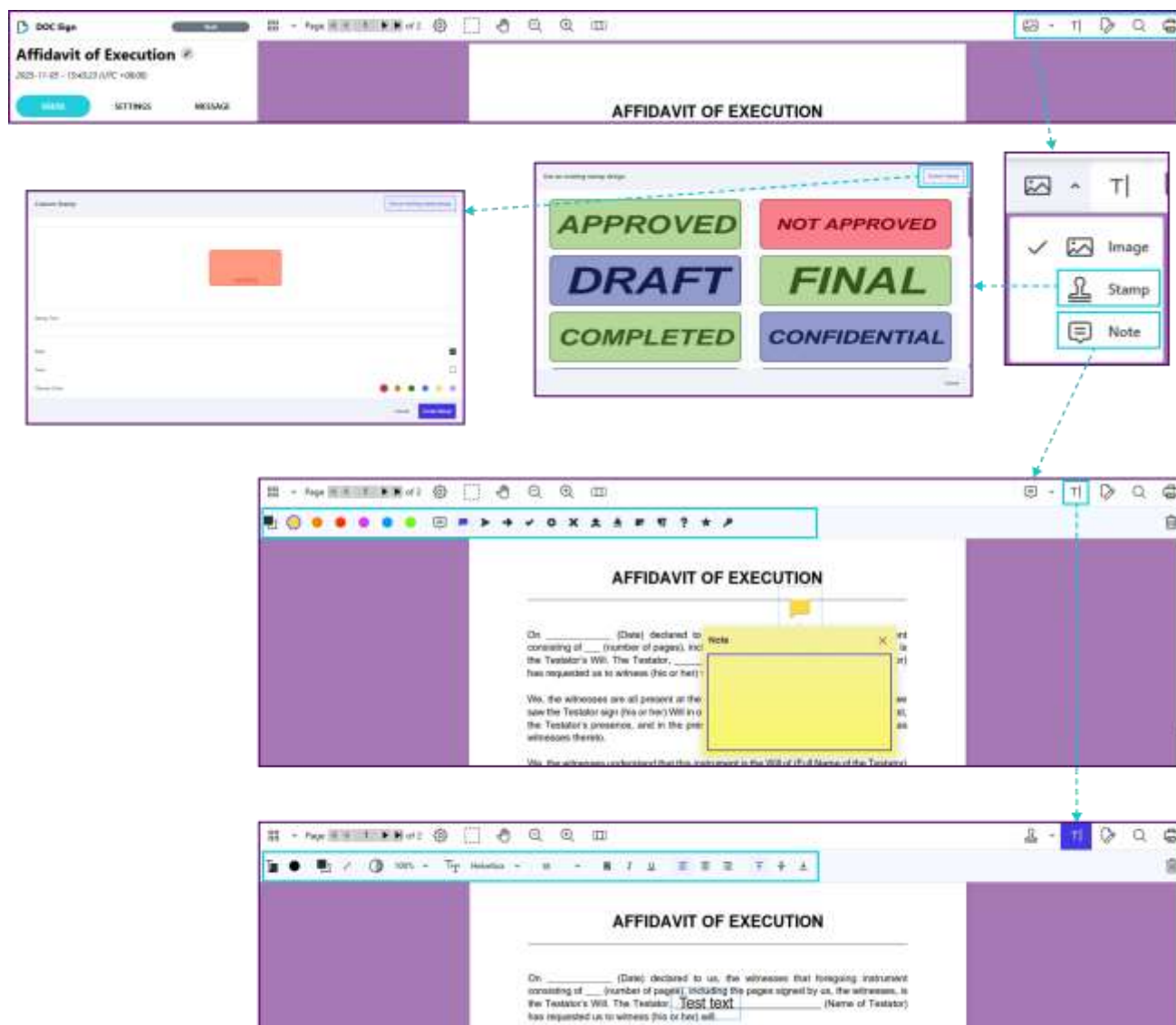
These settings include File Name Customization, Thumbnails (Outlines, Annotations, Signature, Layers, Search Results), Page Settings (Page mode, transition, rotation), Select Multiple annotations, Pan Mode, Zoom in/out and Page Orientation (Fit Page, Fit Width).



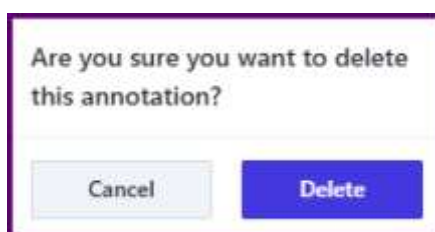


5.2.3.1. DOCUMENT ANNOTATION TOOLS

Apart from the basic document editing tools, DOCONCHAIN also provides options for adding elements on your file such as Images, Stamps and Notes. You can also add and edit text annotations on your document.



You may customize the note/text using the tool bars on top of the document. To delete an annotation, simply click the mark then press the DELETE or BACKSPACE button to confirm.





5.2.4. MANAGING RECIPIENTS

5.2.4.1 ADDING RECIPIENTS

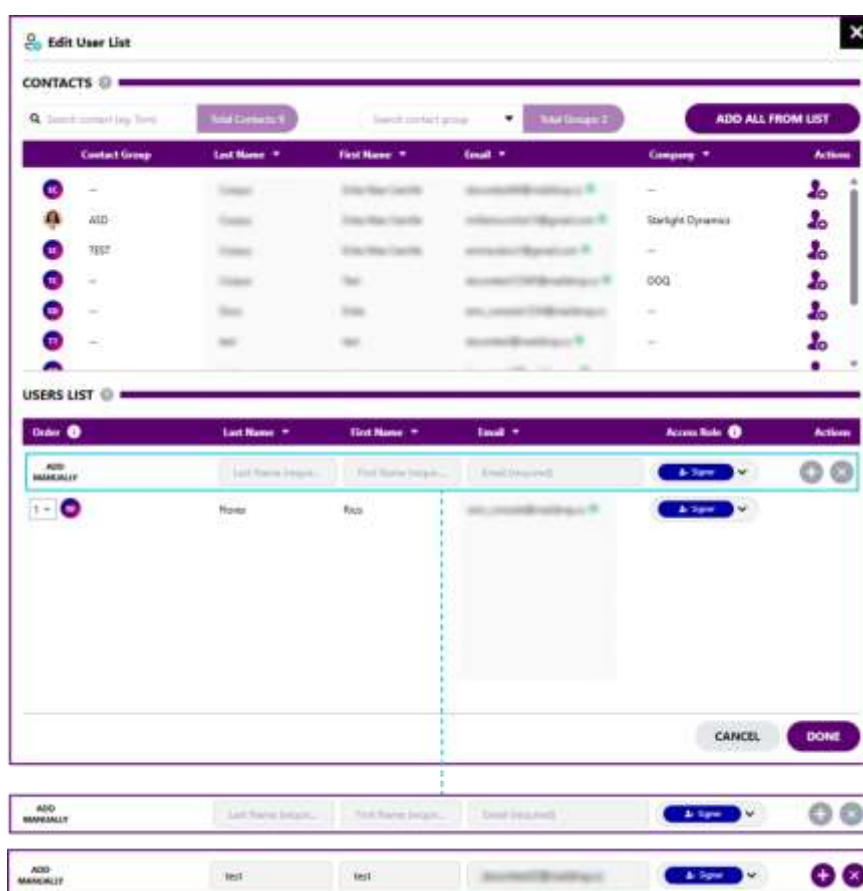
Document settings allow users to customize the signatory type and add recipients on the document. You can also assign roles to your recipients namely: **Signer, Approver, Viewer or Issuee**.



You may search and add recipients from the **Contacts**.

Or manually add recipients using the fields: Name, Last Name, Email Address and Access role.

Under the **USERS** tab, this is where you can view the recipients and their respective roles. To edit this, click on the **Edit list** on the upper right corner. **Edit User List** lets you add other people in your document and assign specific roles for them.



Assign the access role to your recipients based on the following functions:

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

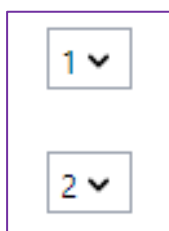


Once done, click the '+' button to add them to your recipients and click DONE to close the modal. You may also see some action buttons to edit, add the recipient on your contacts list, or delete them.





5.2.4.2. SIGNATURE ORDER



Located to the left of each recipient's name, the Signature Order allows you to determine the sequence in which a single or a group of recipients will be notified and asked to sign, before continuing to the next recipients. This ensures recipients only receive the document when it is their turn to sign, preventing confusion and delays.

5.2.4.3. ADDING USER FIELDS

You may further personalize your document with DOCONCHAIN's Mark Placement Tool

To place marks on your document, follow these simple steps:

1. **Navigate:** Click on the thumbnail or scroll to the desired page.
2. **Highlight:** Select the recipient's name and the select a mark using the '+' button.
3. **Customize:** Choose where to apply the mark on the document. You can also select all pages, the current page, or a specific page number for each mark.

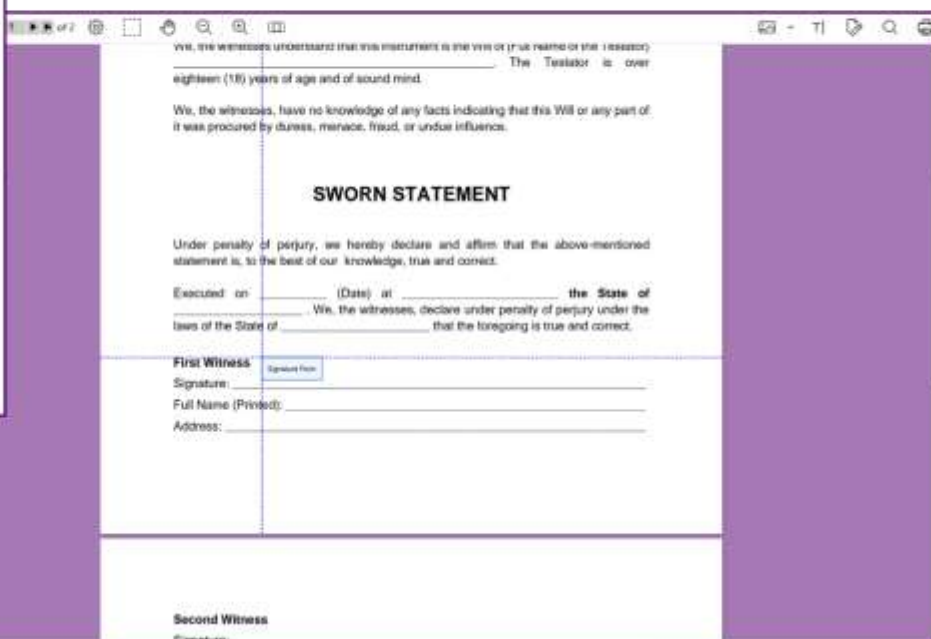
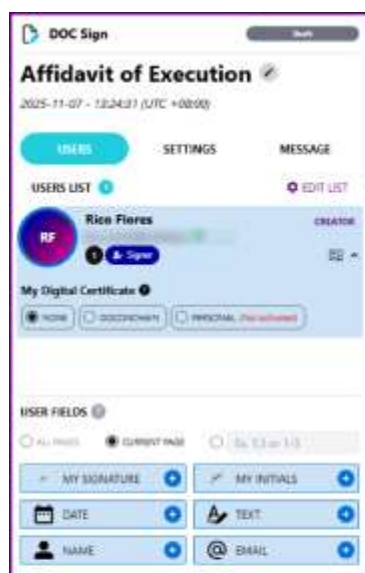
Current fields available:

Signature & Initials – places the signers' digital signature or initials on the document.

Text – Allows signers to input required information or notes.

Date – Insert editable date field for the signer.

Name and Email – Displays the signers' name or email.





5.2.5. SETTINGS TAB

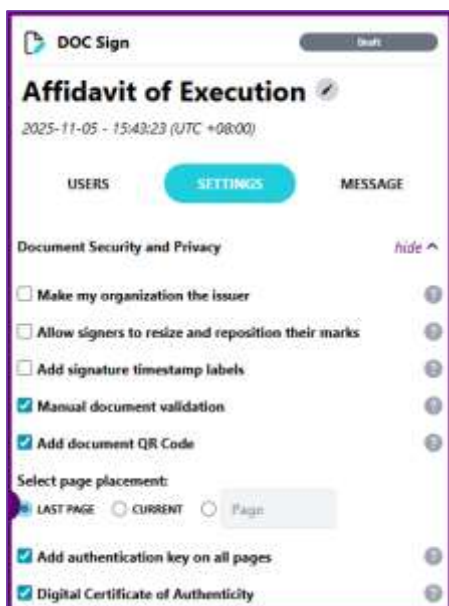
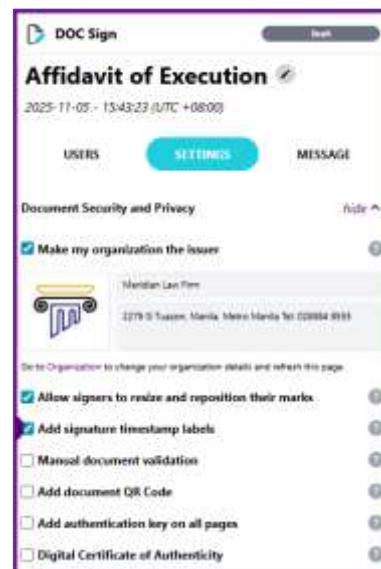
5.2.5.1. DOCUMENT SECURITY AND PRIVACY

DOCONCHAIN also provide a variety of options ensuring your document security and privacy:

Make my Organization the Issuer. This allows you to send a document on behalf of your organization or your company name instead of the account holder's name. It is also part of our branding feature, which allows you to promote your brand with each document you send.

Allow Signers to Resize and Reposition Their Marks. This option allows your recipient to move and resize their marks on your document.

Signature timestamp labels. This provides additional information on the document: the name, email, date, and time when the document has been signed. *Note: Once the document has been completed, the labels cannot be removed.*



Manual document validation. This allows the creator to recheck the document prior to ensuring that all marks are properly aligned and placed on the document once signed by all the recipients. The document will return to the creator's DOC Sign page for their validation.

Add document QR code. The QR code is used for instant verification of your document. You can also select the page placement whether it be on the last page, current page, or a specific page number. The QR code is also resizable and can be moved anywhere on the page. Another unique feature is that this QR code is clickable, which provides easier access to the document.

Add authentication keys on all pages. A unique document identifier for additional security.

Digital Certificate of Authenticity. A digital certificate is embedded in the document to verify its authenticity with supported PDF viewers (e.g., Adobe Acrobat, Microsoft Edge).

Certificate: DOCONCHAIN PH INC

Issued by: Government Authentication CA – G2 DICT (Philippines)

Note: You may need to manually trust the certificate in your PDF viewer to validate the signature.



5.2.5.2. ACTIVE DOCUMENT ACCESS

Active Document Access provides the creator with the authority to restrict access on the document during the signing process. These settings cannot be changed once the document is sent.

Account Restriction. Allows signers to view or sign your document as guests (no account required) or requires them to create an account and verify their email first with DOCONCHAIN.

Signature Type. This restricts which signature type will be allowed to be used by signers.

Signature Reminders. This feature provides emails reminders that are sent automatically, instead of manually resending them. You can set the number of day/s of the first reminder, which will be counted after the document was sent out, and the following reminders will be counted after the first.

You may select either one or both reminders. *Note: the signature reminder will stop once the document has been signed and completed.*

5.2.5.3. COMPLETED DOCUMENT ACCESS

Completed Document Access provides the creator the ability to restrict access to the document once it has been signed and completed. These settings can be changed at any time.

Viewer Access. This restricts access to your document once it has been signed and completed. It is an additional security feature to avoid unauthorized access as well as track the users who access/download your file.

Public Access. Anyone with the link to your document can access the file. You may also select under the **Account Restriction** whether viewers should have no account required or create an account first before accessing your file.

Private Access. Only logged-in DOCONCHAIN account users will be able to access your document. This option automatically puts the Account Restriction to Account creation required.

Document Description. This optional feature allows you to put any additional information about your document. This description will reflect on the email notification to your recipients. After inputting any detail, click **Update** to save it before proceeding to another tab.



5.2.6. MESSAGE TAB

Message Tab allows you to customize the Subject Line as well as the message to be sent to your recipients via email.

From field. This will be the 'sender's name via DOCONCHAIN.' If you selected Make my Organization as the Issuer option on the Document Security and Privacy Settings, the sender's email will be the "Organization name via DOCONCHAIN".

Subject field. You can customize the email subject line of your signature request thus making it easier to be recognized by your recipients. This is available with the for Business and Enterprise Plans as part of our branding feature.

Message. Put any additional messages to your document. *Note: click "save" first before proceeding to make sure the message will be saved/updated.*

The screenshot shows the DOC Sign interface for a document titled "Affidavit of Execution". At the top, there's a "Draft" status and a timestamp "2025-11-05 - 15:43:23 (UTC +08:00)". Below this are three tabs: "USERS", "SETTINGS", and "MESSAGE" (which is highlighted in blue). The "From:" field is populated with "Rico Flores via DOCONCHAIN <sign@doconchain.com>". The "Subject:" field contains "Signature Request via DOC Sign | Affidavit of Execution". The main message area has a placeholder text: "Complete this document on the DOCONCHAIN platform." At the bottom, there's a note "Maximum 3,000 characters only" and a "Save" button.

5.2.7. SENDING A DOCUMENT

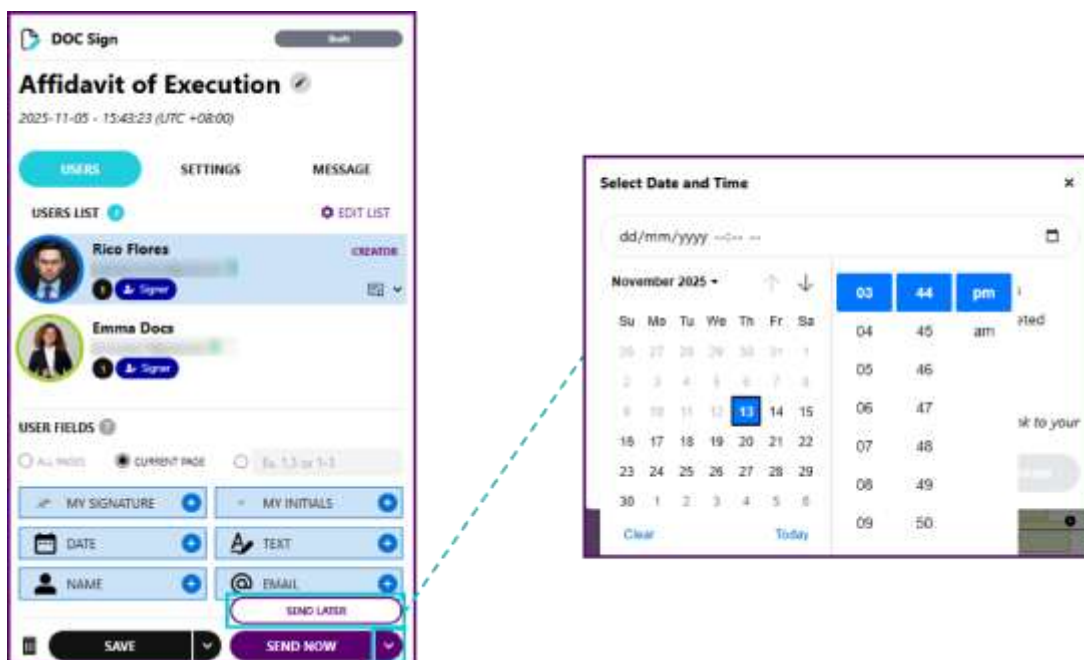
DOCONCHAIN allows two options for sending out a document: **Send Now** or **Send Later**.

Send Now. Lets you send the document in real time. Once the document is finalized and all marks (signature boxes for signers) are placed, the send now option will be activated allowing you to send out the file.

Send Later. Allows you to schedule documents for delivery at a specific time and date. This is ideal for recipients in different time zones or those who may be unavailable.



To use Send Later:



1. Click the “Arrow” button next to “Send Now” and click "Send Later".
2. Select the desired delivery date and time.
3. Confirm your selection.

Your documents will then be sent automatically at the scheduled time.

You may also click “Save” to save your progress and continue working or “Save & Exit” after clicking on the “Arrow” button next to “Save” to save your file as a draft and return to the DOC Sign page.



The last step prior to sending out the document is to confirm the notifications that you want to receive via email.

Receive an email notification during the document updates. Be notified or not via email when the document has some updates (when a recipient signs or approves).

Receive an email notification when the document is completed. Be notified or not via email when the document has been completely signed.

Attach completed document (PDF). Receive the document by email once it is completed.

Attach certificate of completion (PDF). Receive the certificate of completion by email once the document is completed.



SEND CONFIRMATION

The document will be sent to these recipients:

Emma Docs, [emma.docs@docochain.com](#)

Click "YES" to proceed.

- ☒ Receive an email notification during document updates
- ☒ Receive an email notification when document is completed
- ☒ Attach completed document (PDF)
- ☒ Attach certificate of completion (PDF)

If the PDF attachment exceeds 10mb, you will receive an email link to your signed document.

CANCEL YES

Note: If the PDF attachment exceeds 25 MB, you will receive an email link to your signed document. All recipients with a DOCONCHAIN account will have the options to enable or disable the notification options. Users without a DOCONCHAIN account will receive a PDF copy of the document and certificate automatically after signing as guests. All completed documents are available in the DOC Vault even if the user creates an account after sign.

Once you have completed these settings, click [YES] to proceed. You will then be redirected to the DOC Sign page, where the document status will show as "waiting for others."

DOC Sign				
Sign documents with full control over privacy and security. Or go to the DOC Vault to view your completed documents.				
All files	Waiting for me	Waiting for others	Scheduled	Drafts
Name	Creation Date	Users	Status	
Affidavit of Execution <small>By Rico Flores</small>	2025-11-05 - 15:43		Waiting for others	<button>Waiting for others</button>
Contract 2025-222 <small>By Rico Flores</small>	2025-11-13 - 10:23		Draft	<button>Draft</button>
NDA Doconchain Blank(3) <small>By Rico Flores</small>	2025-05-26 - 09:30		Draft	<button>Draft</button>

The recipient will then receive an email notification where they could view and sign the document. Once the document has been completed, it will be saved to your DOC Vault.

Users

Rico Flores CREATOR

1

Signer

SIGNED

Emma Docs

1

Signer

AWAITING SIGNATURE



Clicking on the users in the dashboard will show you the list of recipients that the document has been sent to. This shows the Name, Email, Role, Signing order, and Status of the recipient. You can also resend the document by clicking on the plane icon next to the status.

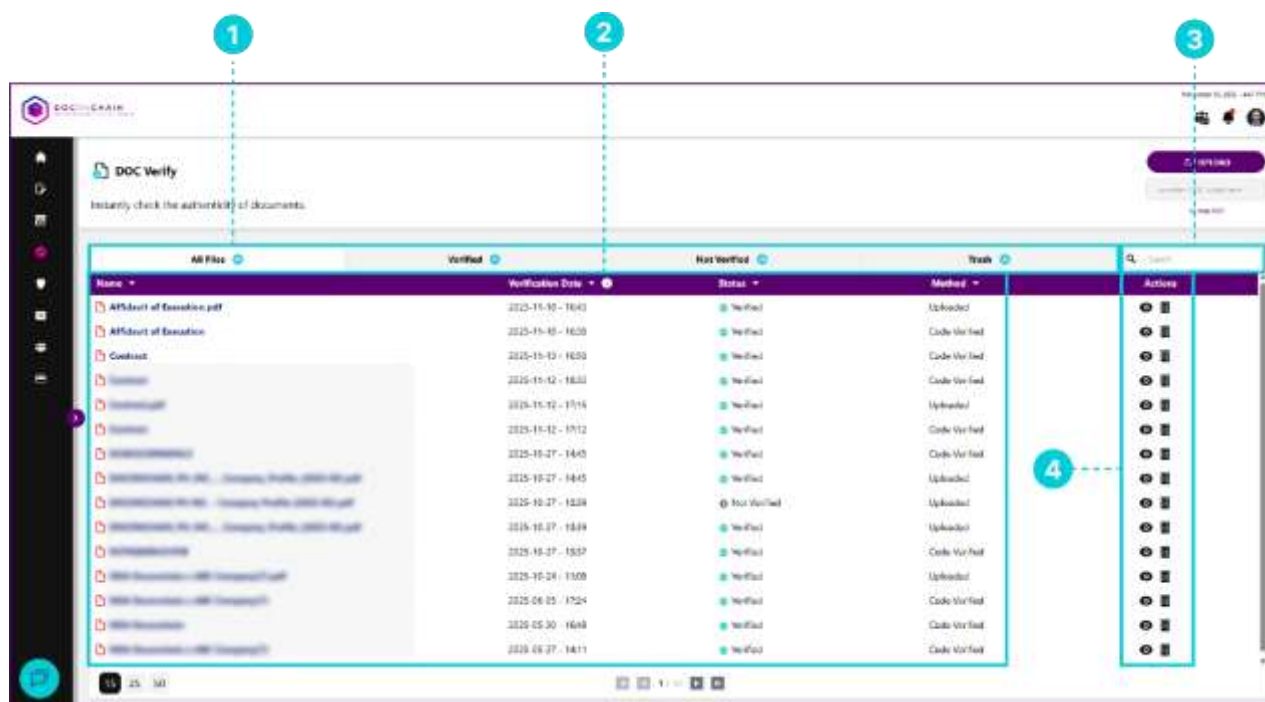
5.3. DOC VERIFY

DOC Verify empowers users to authenticate the integrity of their documents and information (users, events, timestamps, devices, etc.). When a document is secured on DOCONCHAIN, its data and metadata are immutably recorded on our blockchain. Verification involves comparing the document's information against the blockchain records, proving its authenticity, detecting any alterations outside the platform, and confirming its recognition status.

5.3.1. DOC VERIFY DASHBOARD

DOC Verify Dashboard shows you the list of all documents that you verified through DOCONCHAIN. You may sort them using the tabs (1) **All Files, Verified, Not Verified, Trash** and/or rearrange the files based on the (2) **Name, Verification Date, Status** or **Methods**.

You may also search for a specific file using the name at the designated (3) **Search tab**. (4) **Action buttons** on let you **view** or **delete** the verification history.



5.3.2. VERIFICATION STATUS

DOC Verify has 3 types of verification status:

Verified. (Green status) The document is original and is the exact copy that was secured on the platform, it has not been altered or tampered outside the platform. This can only be verified by uploading the document to the platform.



Not Verified. (Red status) The document is not recognized by DOCONCHAIN. It has either not been created on our platform or the file has been tampered or edited. It cannot show however, which part of the document has been altered. This can only be verified by uploading the document to the platform. In this event, ask the recipients of the document to send you an original copy or a document code for manual verification.

Code Verified. (Orange status) The code redirects to an original document created and secured on the DOCONCHAIN platform. As the platform cannot verify the secured document with any copy on hand, a visual and manual verification of any discrepancies is necessary to completely authenticate the user's copy. This can only be verified by inserting the document code (only accessible in the document's passport), by scanning or by clicking on the QR Code from the document or certificate pages.

5.3.3. VERIFICATION METHODS

DOC Verify has 2 verification methods:

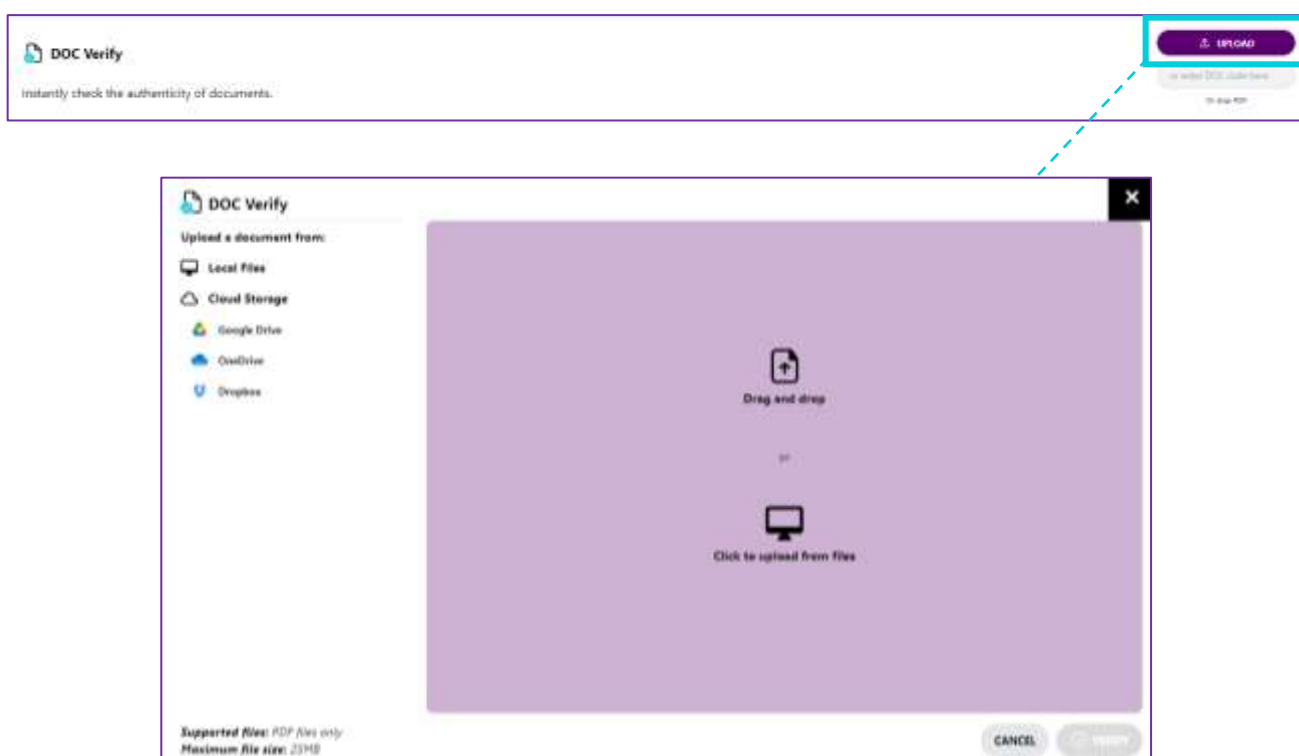
Uploaded. The document verified using the upload button or the drag and drop option.

Code Verified. This method appears either when the QR code on the document or certificate is clicked or scanned, as well as when the Document Code is used. Code Verified only shows the original copy of the document that has been created and signed on the DOCONCHAIN platform.

5.3.4. VERIFYING A DOCUMENT

You may start verifying your document using the following methods:

(1) Using the [**UPLOAD**] button, you may select a document from either your Local Files or your chosen cloud storage (Google Drive, OneDrive or Dropbox) to verify. Note that the supported file for this solution is PDF format only and the maximum file size is 25MB.





(2) You may also use the **Drag and Drop** method on this modal or on the upper part of the DOC Verify Dashboard.

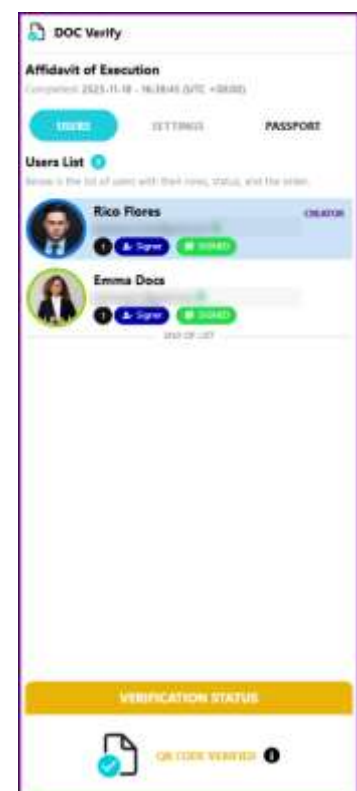


After uploading, the Document will display its verification status to let you know if your file is **Verified** or **Not Verified**.

You may also see other information about your document including the users that signed, viewed, or approved your file.

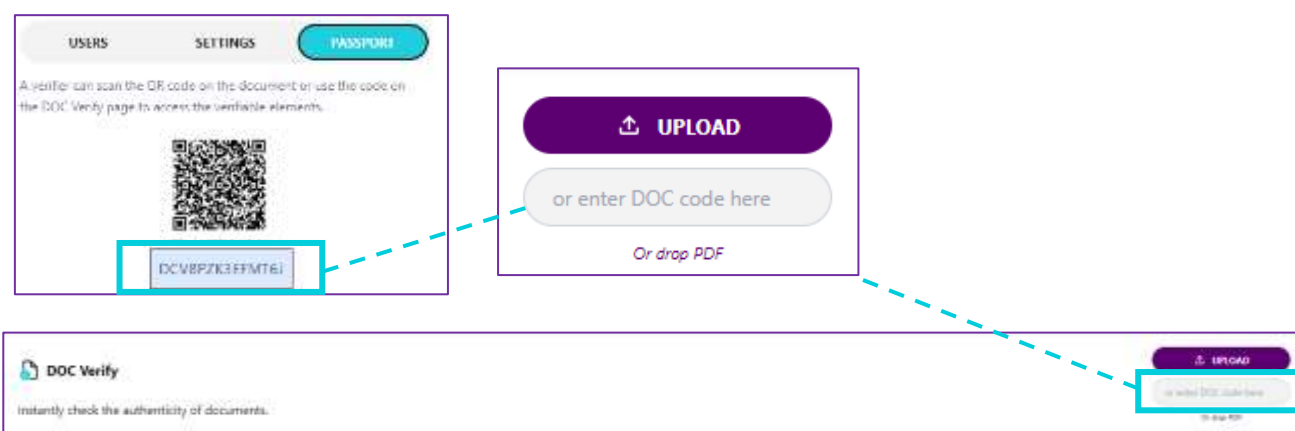


(3) You may also use the **QR Code** embedded on your document to verify your file. Once signed, you may click/scan the QR Code, and it will be prompted to the original copy of the document. Note that if the document has not been signed yet, clicking/scanning the QR code will redirect you to DOCONCHAIN website.





(4) Another way to verify your file is to use the **Document Code** which can be found in the DOC Passport.



To manually check for potential fraud, you can compare the document with your physical or digital copy. If you suspect tampering, upload the document, if possible, to DOC Verify for further verification.

5.4. DOC VAULT

DOC Vault is a feature offered by DOCONCHAIN, designed for the secure and efficient management of documents and digital assets on the blockchain. It leverages blockchain technology to provide a range of functionalities related to document storage, management, and access sharing.

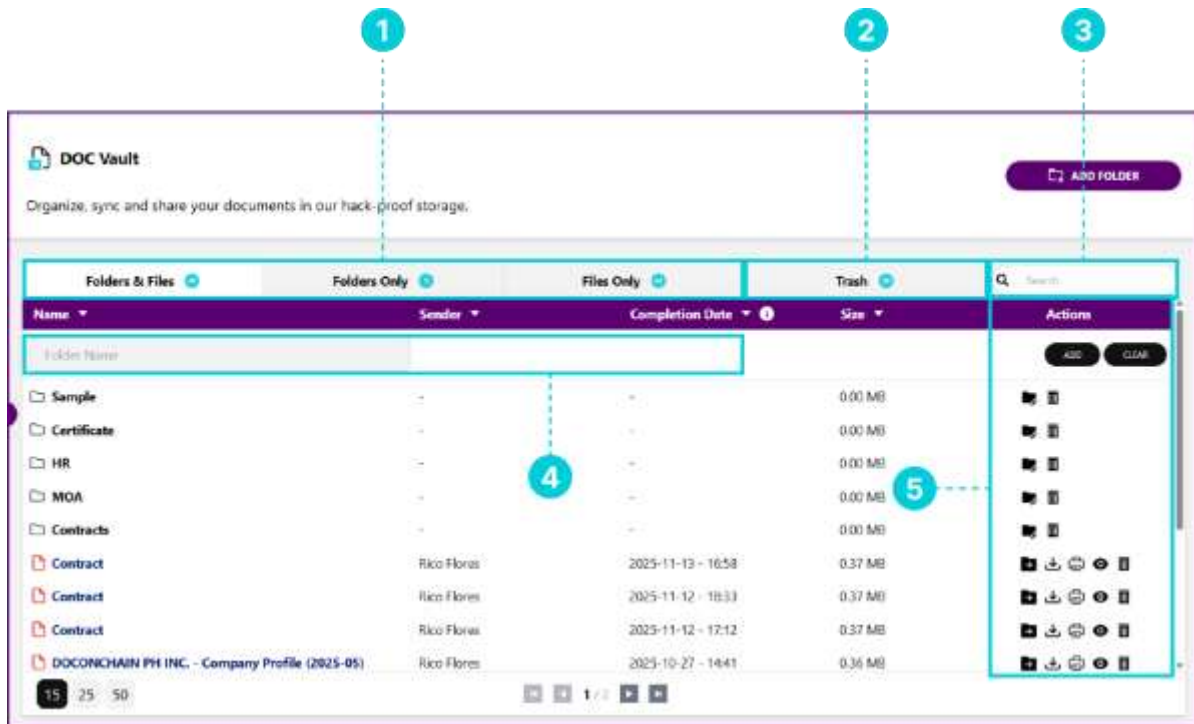
HOW DOES IT WORK?

Upon completion of the signing and approval process by all recipients, the document will be automatically transferred to the DOC Vault. To view the document, access the DOC Vault dashboard through the Side Menu. You can also organize your documents efficiently by creating custom folders.

5.4.1. SORTING OUT DOCUMENTS

You can sort the items using the (1) tabs for Folder and Files, Folders Only, and Files Only; restore or permanently delete your files in the (2) Trash Folder; or search for your documents using the (3) Search Tab.

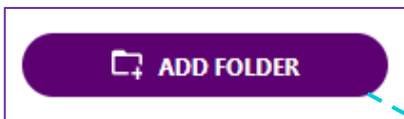
You may also sort the files and folders according to (4) Name, Completion Date or Size. (5) Action buttons on the dashboard allow you to move the file to a folder, download, print, view or delete a document/folder or edit a folder name.



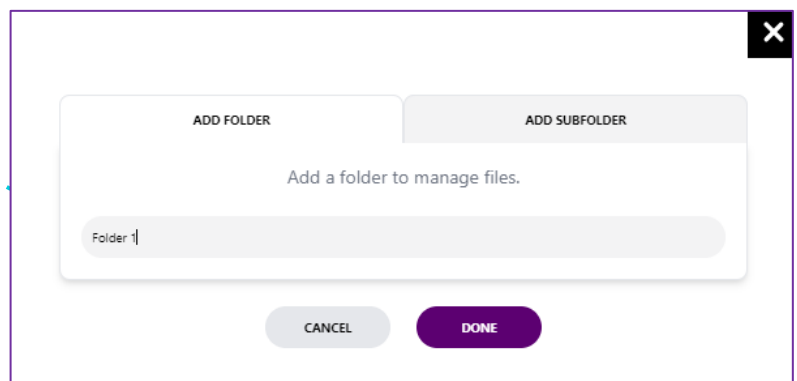
5.4.2. ADDING FOLDERS

To better organize your files, DOCONCHAIN allows you to create folders in your DOC Vault. There are two ways to create folders.

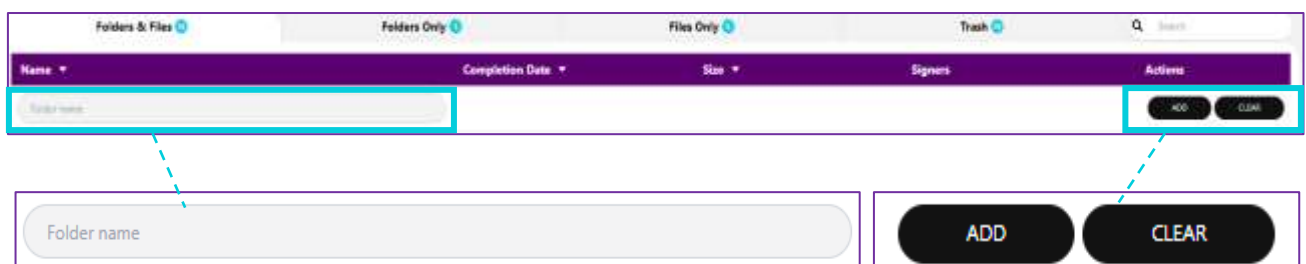
First is by clicking the [ADD FOLDER] button on the upper right corner of the DOC Vault Dashboard.



Input the name of your folder and click [DONE] to save your new folder.



The second method is by simply inputting the name of your folder in the field found below the labels and clicking the [ADD] button to create it.

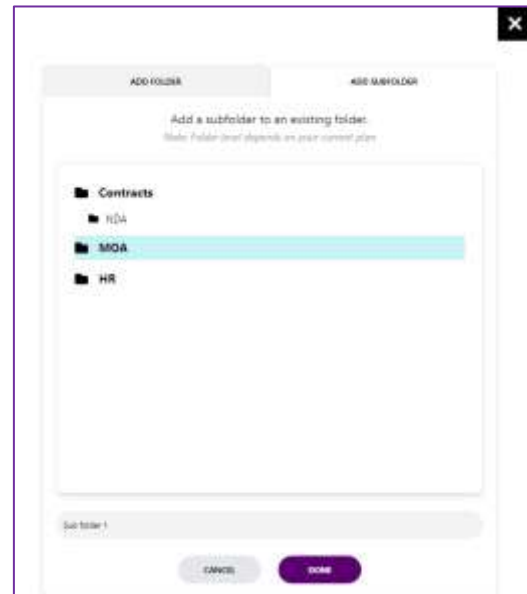




5.4.3. ADDING SUB FOLDERS

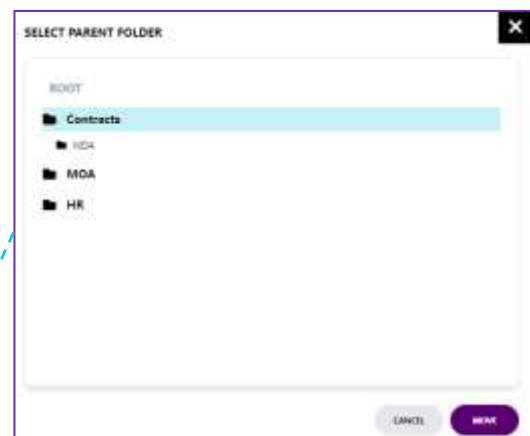
You may also add a Sub Folder inside your folders for better management of your documents. To add a sub folder, click the [ADD FOLDER] button and select the add sub folder tab.

Choose the folder where you want the sub folder to be created and add the name in the field below. Click [DONE] to create the sub folder.




5.4.4. TRANSFERRING DOCUMENTS TO FOLDERS

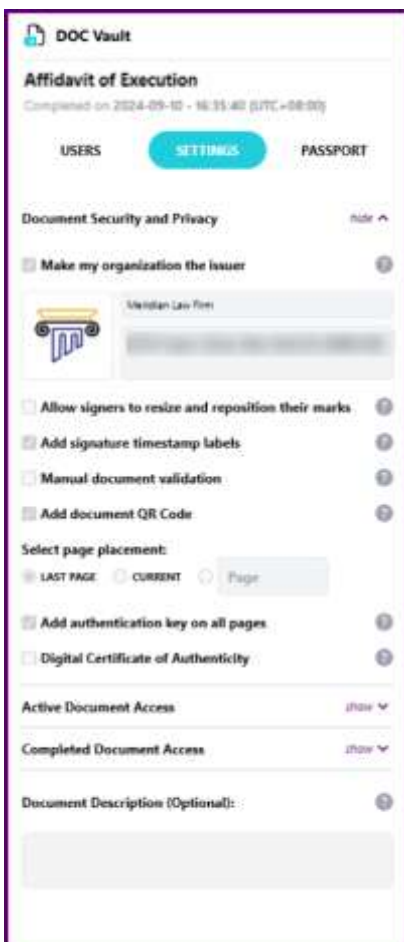
After creating folders and/or sub folders, you may now start moving documents using the transfer icon found in the Action Buttons column. Select your chosen folder and click the [MOVE] button to proceed.





5.4.5. ACCESSING A DOCUMENT

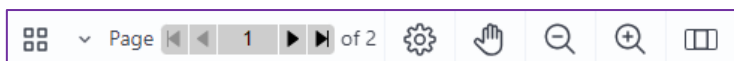
DOC Vault also lets you access your signed documents, review users' information and the settings set during the project creation process. To view, simply click on the view icon  in the Action Buttons column.



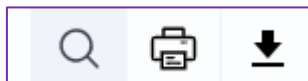
You may review all the options you selected under the **Document Security and Privacy Settings** and **Active Document Access** but cannot make any changes on it.



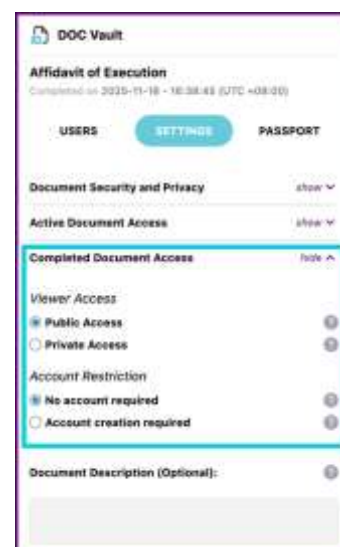
You may also navigate the document using the following settings:



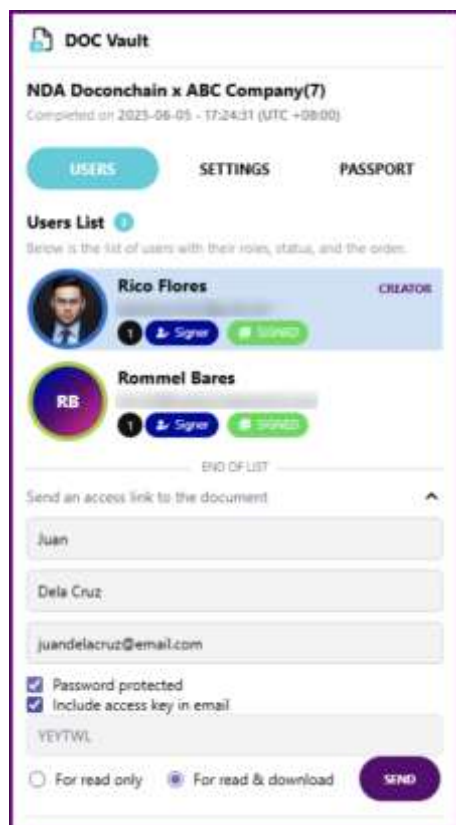
Or search a keyword inside the document, download and print the file:



On the other hand, options for the Completed Document Access can be modified. This means that you may change both the **Viewer Access** and **Account Restrictions** for those who will be accessing your document.



5.4.6. SHARING DOCUMENT ACCESS



DOCONCHAIN allows you to securely share document access with others within the platform, eliminating the need to download and send documents externally, which can increase the risk of fraud and data leaks.

To share an access to your file, open your document on the DOC Vault and go to Users tab. Under the user's information, you will find the option to **Share an access link to the document**.

Fill out the needed information (first name, last name, email address) of the person that you want to provide the link to.

To further protect your file, click on the **Password protected** and **Include access key in email**. This will require the recipient to input the access key given on your email notification prior to viewing the document.

You may also restrict access to either **For read only** or **For read and download**.

Once done, you may click [SEND] and the access link will be sent to the recipient via email.



5.5. DOC PASSPORT

DOC Passport is a DOCONCHAIN solution that provides all the document's important information, such as: Certificate of completion, comprehensive event history trail timestamps, the event security keys, and the identities of the recipients of your document. Leveraging blockchain technology, every action performed on a document signed through DOCONCHAIN is securely encrypted and recorded, making it easy to track the history of your file.

DOC Passport is now accessible in:

- Active or in-progress document in DOC Sign (document viewing or quick sign)
- Completed document in DOC Vault
- Verified document in DOC Verify (only for with Verified status)

To access the DOC Passport, open a document and go to the **Passport** Tab.

For the **DOC Sign Passport (document viewing and quick sign)**:

- Shows the ongoing history trail and unique key hash of user, updated in real time.
- Certificate of Completion is not available (only applies to completed documents).
- Sharing the access link is disabled
- The QR will be a temporary and not scannable; the code will show "N/A"

For the **DOC Vault Passport**

- Shows the history trail, updated in real time whenever the document is accessed.
- Shows all the unique key hash of each user and the completed document
- Certificate of Completion will be available
- Sharing the access link is enabled
- The QR and code will display

For the **DOC Verify Passport**

- It will show the history trail, and will be update in real time every time user accessing the document
- Certificate of Completion will be available
- Sharing of access link will not be available
- QR code will not be available

PASSPORT


DOC Vault
HISTORY
BLOCKCHAIN
USER DATA
CERTIFICATE OF COMPLETION
X

Affidavit of Execution

Completed on 2025-11-18 - 16:38:45 (UTC +08:00)

USERS
SETTINGS
PASSPORT

A verifier can scan the QR code on the document or view the code on the DOC Verify page to access the verifiable elements.



D-BG9H-7RQWZKJ

Or you can send a direct access to the verifiable elements to a verifier.

Send an access link to the passport ↗

Send an access link to the certificate of completion ↗

Trial	User	Role	IP Address	Location	Timestamp
Passport Accessed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-21 - 18:57:01
Passport Accessed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 16:59:26
Passport Accessed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:29:32
Document Viewed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:28:28
Passport Accessed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:28:19
Passport Accessed	Guest	< Guest	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:23:14
Document Viewed	Guest	< Guest	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:20:04
Document Verified	Guest	< Guest	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:20:04
Passport Accessed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:19:30
Passport Accessed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:19:07
Passport Accessed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:00:52
Document Viewed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:00:49
Document Viewed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 14:00:47
Passport Accessed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 13:56:56
Passport Accessed	Rico Flores	< Creator	158.82.27.82	Bagong Pagasa, Philippines	2025-11-19 - 11:26:59
Passport Accessed	Rico Flores	< Creator	130.168.37.182	Manila, Philippines	2025-11-18 - 17:14:03
Document Viewed	Rico Flores	< Creator	130.168.37.182	Manila, Philippines	2025-11-18 - 17:13:59
Document Verified	Rico Flores	< Creator	130.168.37.182	Manila, Philippines	2025-11-18 - 17:13:58

5.5.1. HISTORY TAB

DOC Passport offers a comprehensive audit trail for every document uploaded and signed on the DOCONCHAIN platform. Blockchain technology ensures that all actions performed on a specific file are securely recorded, providing a transparent and reliable tracking history.

The history records the actions performed, user, user's role, IP address, location, and timestamp for each interaction with a specific file. This detailed audit trail provides a complete record of the document's lifecycle.



HISTORY						
BLOCKCHAIN						
USER DATA						
CERTIFICATE OF COMPLETION						
Trail	User	Role	IP Address	Location	Timestamp	
Passport Accessed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-21 - 16:57:01	
Passport Accessed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 16:09:26	
Passport Accessed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:29:32	
Document Viewed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:29:28	
Passport Accessed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:29:19	
Passport Accessed	Guest	Guest	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:23:14	
Document Viewed	Guest	Guest	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:23:04	
Document Verified	Guest	Guest	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:23:04	
Passport Accessed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:19:16	
Passport Accessed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:19:07	
Passport Accessed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:00:52	
Document Viewed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:00:49	
Document Viewed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 14:00:47	
Passport Accessed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 13:56:56	
Passport Accessed	Rico Flores	Creator	158.62.27.92	Bagong Pagasa, Philippines	2025-11-19 - 11:24:59	
Passport Accessed	Rico Flores	Creator	136.158.37.182	Manila, Philippines	2025-11-18 - 17:14:03	
Document Viewed	Rico Flores	Creator	136.158.37.182	Manila, Philippines	2025-11-18 - 17:13:59	
Document Verified	Rico Flores	Creator	136.158.37.182	Manila, Philippines	2025-11-18 - 17:13:59	

5.5.2. BLOCKCHAIN TAB

The Blockchain tab displays the encrypted hash codes generated during the signing process and stored on the blockchain after completion. These hash codes serve as unique identifiers for the document and are essential for verifying its authenticity and integrity.

HISTORY			
BLOCKCHAIN			
USER DATA			
CERTIFICATE OF COMPLETION			
Event	User	Timestamp	Blockchain transaction key (hash)
Completion	Rico Flores	2025-11-18 - 16:38:45	4a1...49c
Signature	Emma Docs	2025-11-17 - 17:29:12	8a...457b9
Signature	Rico Flores	2025-11-13 - 15:46:10	2a...1c843

5.5.3. USER DATA TAB


The User Data tab provides detailed information about the parties involved in the signing process, including their names, signature dates, and email addresses. This comprehensive view helps you track and manage the document's lifecycle effectively.

HISTORY						
BLOCKCHAIN						
USER DATA						
CERTIFICATE OF COMPLETION						
Role	User	Email	Position	Company	Country	
Signer	Emma Docs		Content Writer	DOO	Philippines	
Creator	Rico Flores		Head of Operations	RICFLOW CORPORATION	Philippines	

5.5.4. CERTIFICATE OF COMPLETION

DOC Passport allows you to view and access the Certificate of Completion of your signed document. This Certificate records all necessary information about your signing process including the signed document details, user information, date and time of signature, user account details, security keys, device, and type of signatures used.

[illegible]



DOCCHAIN
SECURING YOUR DIGITAL WORLD

CERTIFICATE OF COMPLETION
(Generated on 2025-11-18 - 16:38:50 [UTC+8:00])

Document:

Affidavit of Execution (2 page(s))

Creator:

Rico Flores (rcoflores@docchain.com)

Creation:

2025-11-05 - 15:43:23 (UTC+8:00)

Completion:

2025-11-18 - 16:38:45 (UTC+8:00)

Authentication Key:

4e5d7f3c2daeb4bbafba7c3d7fbdbccac952b11ad1cf326be493c

Sign Order: No

Signer(s): 2

Approver(s):

Viewer(s):

Issue:

This section displays the document details such as document name, creator name and email, creation and completion date and the unique authentication key of the document itself. It also shows the sign order settings and the number of users per role

This section displays the signer details such as name, email, title, company, and account status. It also shows the document interaction timeline including when it was sent, view. Additional metadata includes a digital signature hash for verification.

SIGNER		Sent:	2025-11-13 - 15:46:11 (UTC+8:00)
Emma Docs		Viewed:	2025-11-17 - 17:28:33 (UTC+8:00)
emma.docs@gmail.com		Signed:	2025-11-17 - 17:29:12 (UTC+8:00)
Title:	Content Writer	Signature:	Draw 
Company:	DoQ	Device:	Desktop
Account:	Registered	IP Address:	136.158.37.182
Access:	Logged in	Location:	Manila, Philippines
Blockchain Signature Hash:	8a: [redacted] 57b9		



You will also find the QR Code embedded on your document and a note for verification.

This document is digitally signed with DOCONCHAIN

To verify the authenticity of this document,
click or scan the QR Code to access the document
passport, or enter the document code at
<https://app.doconchain.com/verify>

For more information, visit www.doconchain.com



On the left panel, you will also find the same QR code as well as the Document Code which you may both use to verify your file, or share with your network. (See [here](#) on how to use Document Code for verification).



5.5.5. SHARING ACCESS TO LINK

DOCONCHAIN allows you to send an access link of the whole passport or the Certificate of Completion only. This option can also be found in the DOC Passport tab, below the document code.

Just like the document access link, you need to fill out the information (first name, last name, email address) of the person that you want to provide the link to.

To further protect your file, click on the **Password protected** and **Include access key in email**. This will require the recipient to input the access key given on your email notification prior to viewing the document.

You may also restrict access to either **For read only** or **For read and download**.

Once done, you may click [SEND] and the access link will be sent to the recipient via email.

DOC Vault

Affidavit of Execution
Completed on 2025-11-18 - 16:38:45 (UTC +08:00)

USERS SETTINGS **PASSPORT**

A verifier can scan the QR code on the document or use the code on the DOC Verify page to access the verifiable elements.



Or you can send a direct access to the verifiable elements to a verifier.

Send an access link to the passport

☒ Password protected
☒ Include access key in email

1A0201

☐ For read only ☒ For read & download **SEND**

Send an access link to the certificate of completion



5.6. TEMPLATES

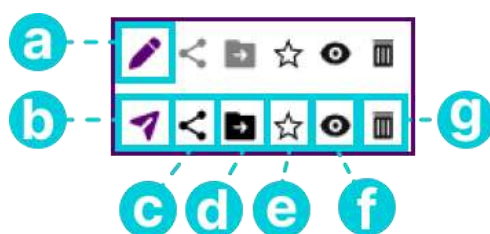
DOCONCHAIN Templates are reusable document structures that help standardize recurring documents, accelerate document preparation, and streamline the signature process. By creating templates with pre-defined fields and workflows, you can ensure consistency and efficiency in your document management. You may navigate the DOC Templates on the [Side Menu](#).

5.6.1. TEMPLATES DASHBOARD

The DOC Templates Dashboard shows you the **(1) Quick Access** menu, **My Folders** and **Shared Folders** which contain templates that is shared among and across your organization.

You may as well view all your templates saved on the dashboard and sort them according to **(2) File Name, Last Modified date, File Size** or **Status**.

The **(3) Actions** buttons, on the other hand, allow you to perform certain actions to your document:



a. Edit – Edit an unpublished template

b. Use – Click to use a published template on DOC Sign

c. Share – Used for sharing templates with other members of your organization

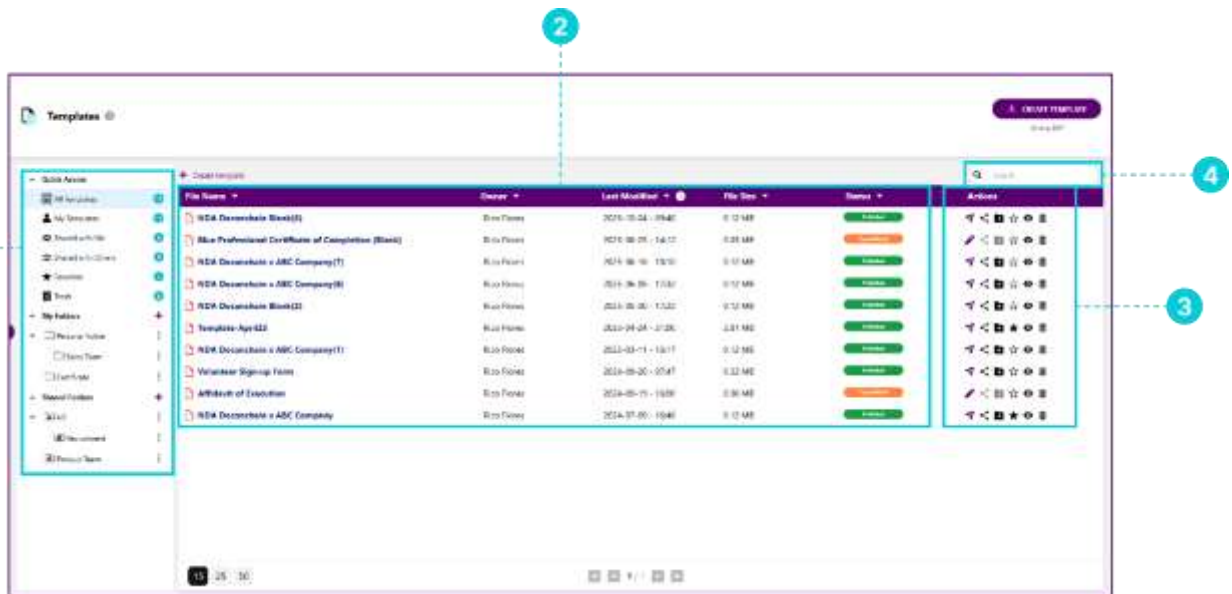
d. Move – Move your templates to your desired folder.

e. Mark as favorite – Mark your regularly used template for quick access

f. View – Viewing the template. (for published and unpublished)

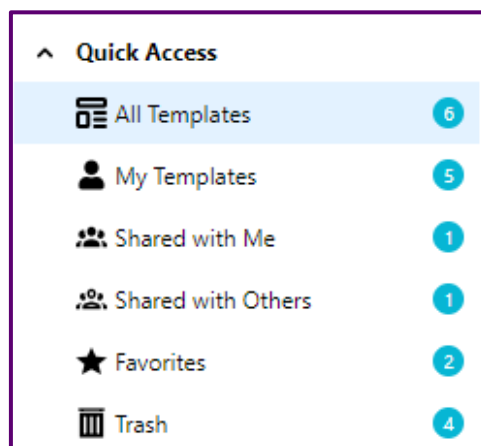
g. Delete – Temporarily delete a template. Deleted template can be found in the 'Trash' tab.

You may also search for a specific file based on the File name on the **(4) Search bar**.



5.6.2. QUICK ACCESS

Quick Access lets you navigate and sort templates according to the following categories:



All templates – This is the overall list of templates that are published, unpublished, or is being shared with you.

My Templates – These are the templates that are created by you, this includes published and unpublished ones.

Shared with Me – You can find here the templates that are shared by other members of your organization to you.

Shared with Others – This list shows the templates that you have shared with others.

Favorites – List of favorited templates.

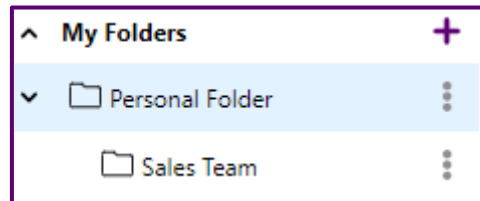
Trash – Temporarily deleted documents can recovered or deleted permanently in this tab.



5.6.3. TEMPLATE FOLDERS

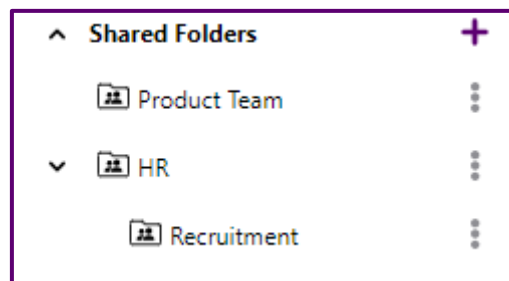
MY FOLDERS

These are the folders that you create in your personal DOC account which cannot be seen and accessed by the other members of the organization.



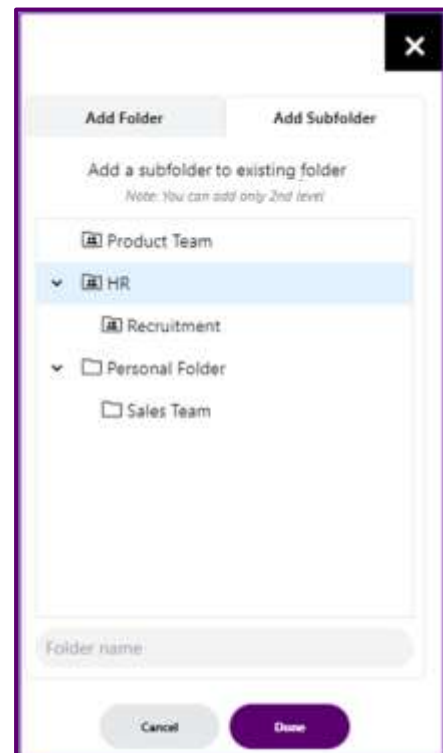
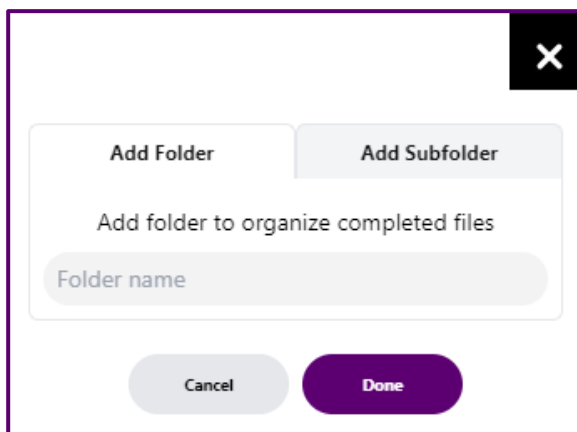
SHARED FOLDERS

These are the folders that are created and shared within and across the organization and sub-organizations that you belong to.



ADDING FOLDER/SUBFOLDER

You may also add a folder or a subfolder under your personal or shared folders using the [+] button.



Once clicked, a modal will pop up where you can input the name of your folder. For Subfolders, you will need to select a main folder first and then input the name of your folder to save it.



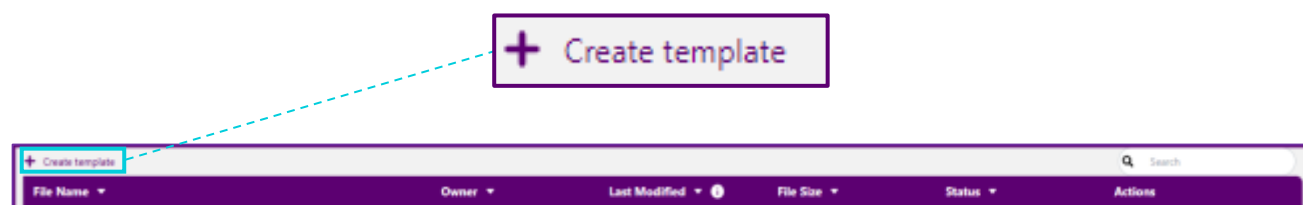
5.6.4. CREATING TEMPLATES

There are various ways to create or upload a template on your DOC account.

First is by clicking the Create template or by using the drag-and-drop option on the upper right corner of your DOC Template Dashboard.



Or you may also click the [+ Create template] option on top of the file name label on your DOC Template dashboard.



Once clicked, a modal window will appear where you can choose where to upload your file from.



Supported files: PDFs and Office files (DOCX, DOC, DOTX, DOCM, PPTX, PPT, PPTM, XLS, XLSX, XLSM, PDF, PDF/A)

Maximum file size: 25MB.



5.6.5. ADDING TEMPLATE ROLES

Once you have uploaded a document, you can start working on it just like any regular document. The settings are the same with the [DOC Sign Project Creation process](#), with the addition of **Template Roles**. This allows you to assign specific roles to recipients based on their responsibilities within the workflow.

To add a template role, you may click on the Edit List option under the Users Tab.

The screenshot shows a modal window titled "EDIT LIST" with a gear icon. Inside, there's a "USERS LIST" section with a table. The table has columns: Order, Template Role, Last Name, First Name, Email, Access Role, and Actions. Below the table, there's a checkbox "Add myself as a recipient" and buttons "CANCEL" and "DONE".

Order	Template Role	Last Name	First Name	Email	Access Role	Actions
1	Permanent Recipient	Last Name (requi...	First Name (requi...	Email (required)	Sign	+
1	Permanent Recipient	Flores	Rico	[Email]	Sign	
1	Role 1				Sign	
1	Permanent Recipient	Docs	Emma	[Email]	Sign	

There are two kinds of Template roles:

Permanent Recipient: This is someone who can be identified from the creation process and will be a permanent or regular person to sign your file

Template Roles: These are placeholder roles for undefined recipients that can be modified during the project creation process. Assigning a role or temporary label to these recipients can provide your team with valuable context and information.

Once done, you may start adding marks and working on your template.



5.6.6. PUBLISHING A TEMPLATE

Upon finalization of your template, you may either **Save as Draft** or **Publish it**. Drafts will have an unpublished status which can be found at the top of your template window. This means that the document is not yet ready to be used in the project creation process and cannot be shared yet.

On the other hand, once you clicked on the [PUBLISH] button, your document will have a Published status which indicates it is ready for reuse and can be shared.

Under penalty of perjury, we hereby declare and affirm that the above-mentioned statement is, to the best of our knowledge, true and correct.

Executed on _____ (Date) at _____ the State of _____

We, the witness(es), declare under penalty of perjury under the laws of the State of _____ that the foregoing is true and correct.

First Witness

Signature: _____

Full Name (Printed): _____

Address: _____

Second Witness

Signature: _____

Full Name (Printed): _____

Address: _____

Third Witness

Signature: _____

Full Name (Printed): _____

Address: _____

NOTARY ACKNOWLEDGEMENT

A notary public or other officer completing this certificate verifies only the identity of the



SAVE AS DRAFT

PUBLISH

Unpublished

Published



5.6.7. USE A TEMPLATE

Published templates can be used as a project through the Action buttons found at the DOC Template Dashboard or at the bottom of the document window.



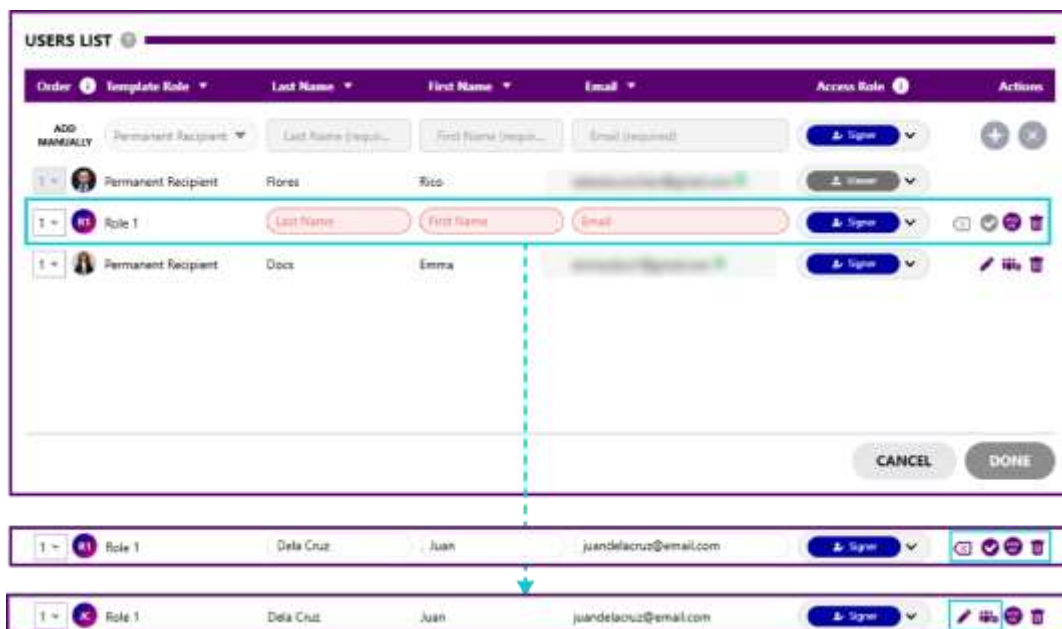
If the document has a template role, on DOC Sign, you can fill in the details of the signer in one of the template roles fields. These fields will be highlighted to make sure that there is a recipient assigned in this role. Once filled in, you can do the following actions;

Clear (✖) – to clear all details in fields.

Save (✔) – to save the current recipient to the role.

Add Me (👤) – you can add yourself in the template role.

Delete (🗑) – to remove the recipient.



After saving, you still have the option to edit the user by clicking on the pen icon (✎), or if they are still not in your contacts, click on the 'Add to contacts' icon (👤) found under the Actions column.



FREQUENTLY ASKED QUESTIONS

What is a Digital Signature?

A Digital Signature is a type of electronic signature that encrypts documents, meta date, events, and timestamps with digital codes that are particularly difficult to tamper. It is the digital equivalent of a signature or stamp that offers more authenticity and security.

Is there a difference between an electronic signature and a digital signature?

Both types are electronic signatures, but a digital signature is more complex and advanced, which includes the identification of the signers, tracking, authentication elements, or audit trail that allows them to be authenticated and associated with the person who executed the signature.

Are digital signatures legal?

Yes, digital signatures are legal and were officially recognized in 1996 when the United Nations Model Law on Electronic Commerce ('MLEC') allowed the use of electronic signatures and declared that they have the same legal impact as Ink Signatures. Many countries like the United States, European Union, and others have passed laws and regulations. Electronic signatures are legally recognized in the Philippines and are provided for in Republic Act No. 8792 and the Electronic Commerce Act of 2000 (the "E-Commerce Act") and its implementing rules and regulations.

Is digital signing in DOCONCHAIN secure?

Yes, because DOCONCHAIN utilizes the hack-proof advantages of blockchain technology with the IBM Hyperledger Fabric and leverage the features included in the Fabric network. It means that Hyperledger Fabric utilizes Crash Fault Tolerance consensus algorithms, meaning it cannot tolerate malicious actors or unauthorized transactions.

Also, DOCONCHAIN's digital signature has unique digital identifiers, access controls, encryption, and other systems to protect the document signing from unauthorized access. Also, DOCONCHAIN's DOC Sign makes sure that the document is locked to ensure that no one can change its content.

Does everyone who signs the document needs to register an account?

No, signatories don't need to register for an account and can be Guest users to sign documents sent to them through DOCONCHAIN. By enabling the quick sign feature, the signing process is handled in the platform environment and the guest users are able to sign in without an account. The signature workflow process highlights each field that the recipient needs to sign. This signing workflow process ensures a complete document with no missing or omitted authorizations or acknowledgments.

What type of device do users can use to sign a document?

DOC Sign solution is device agnostic. This means that when a document is uploaded and ready for signing or distribution, signers can use or sign it from any modern and updated device of their choice: a laptop, desktop, mobile phone, or tablet device.

Is there any cost incurred when signing a document or downloading a completed document copy?



None. Depending on the user plan subscription, the users who create a document for electronic signature may have to pay a fee. But recipients don't have to pay to sign, approve, view, receive, download or print a copy of the completed document.



TROUBLESHOOTING

This section provides solutions to common issues you may encounter while using the platform. Follow the steps outlined for each issue to resolve the problem. If the issue persists, please contact our support team for further assistance.

1. Login Issues

1) What's happening: I can't login to my DOCONCHAIN account.

2) How to fix it:

- Verify that your email and password are correct.
- Try resetting your password using the "Forgot Password" option.
- Clear your browser's cache (see detailed steps below).
- Try using a different browser.
- Contact our support if the issue persists.

2. Forgot Password

1) What's happening: I forgot my password.

2) How to fix it:

- Go to our login modal.
- Click on 'Forgot Password'.
- Enter the email of your account and click "Recover". You will then receive an email link for resetting your password.
- Check your email. If it is not in your primary inbox, also check your spam or junk folder in case it ended up there.
- Click on 'Reset Password', you will be redirected to the platform with a password reset modal. Enter and confirm your new password. Make sure to enter a new password that meets the conditions.
 - i. 8 characters, Uppercase, Lowercase, Special Character, Number.
- Click on 'Save' and you're done.

3. Document Upload Issues

1) What's happening: My document won't upload to the platform.

2) How to fix it:

- Ensure your document format is supported
 - i. Supported files: PDFs and Office files (DOCX, DOC, DOTX, DOCM, PPTX, PPT, PPTM, XLS, XLSX, XLSM, PDF, PDF/A)
- Check the file size if it exceeds the upload limit.
 - i. Maximum file upload size: 25 mb
- Check your internet connectivity, a poor unstable network may prevent your document from uploading successfully.
- Clear your browser's cache (see detailed steps below).
- Try uploading from a different browser.
- Contact our support with details if the issue persists.



4. In a project creation, I can't click on "Send Now"

1) What's happening: The "Send Now" button is not clickable or appears inactive when trying to send a document for signing.

2) How to fix it:

- Check all signers if they have assigned signature fields
- Try to refresh the page
- Check your internet connectivity, a poor unstable network may prevent your document to load properly
- Clear your browser's cache (see detailed steps below).

5. Signature or Initials is Not Saving

1) What's happening: My digital signature and/or initials won't save.

2) How to fix it:

- Try to refresh the page.
- Check your internet connectivity, a poor unstable network may cause your signature to not be saved.
- Try to change your signature type.
 - i. Draw
 - ii. Type
 - iii. Upload
- Must be in black text with white background
 - Max size: 2 mb
 - Supported formats: .png, .jpeg, or .jpg
- Clear your browser cache (see detailed steps below).
- Try a different browser.
- Contact support with a description of the issue if it continues.

6. My Signature does not appear

1) What's happening: I signed a document but I don't see my signature

2) How to fix it:

- You may have incorrectly configured your signature (saved a blank, uploaded a low-quality picture, etc.)
- Try to refresh your page
- Check your internet connectivity, a poor unstable network may prevent your document to load properly
- Clear your browser's cache (see detailed steps below).

7. My Signature doesn't show for Other Recipients

1) What's happening: One or more participants can't see my signature.

2) How to fix it:

- Try to check the role of the recipient, they are not required to sign unless their role is 'Signer'.
- Try to check the user order, the recipient may be required to signed in a later order.



- Remind to refresh the page.
- Ask to try clearing their browser's cache (see detailed steps below) or open in 'Incognito' mode.
- Remind everyone to have a stable internet connection, as connectivity issues can prevent proper syncing.

8. Payment Problems

1) **What's happening:** My subscription payment failed.

2) **How to fix it:**

- Double-check your payment method (e.g., card expiration date, CVV).
- Ensure there are no online payment restrictions from your bank or app.
- Try clearing your browser's cache (see detailed steps below).
- If the issue persists, contact our support or your bank.

9. Recipient has not received an email for Signature or Approval

1) **What's happening:** I sent a document to a recipient (either for signing or approval) but they didn't receive the email.

2) **How to fix it:**

- Double-check the email address for typos or unnecessary spaces.
- Ask them to check their **spam** or **junk folder** in case the email ended up there.
- Ask if their inbox is full, new emails might be bounced back or be undelivered.
- Ask the recipient if they have a strict privacy setting that block emails from unknown senders or having attachments of certain formats.
- If the above solutions don't work, try resending a reminder:
 - i. Go to your document in **DOC Sign**.
 - ii. Select the Resend Reminder under the action's column. This will send a new email prompting the recipient to complete the signature or approval.

10. Invitee has not received an Organization Invitation

1) **What's happening:** I invited someone to join my organization, but they did not receive the invite email.

2) **How to fix it:**

- Double-check the email address for typos or unnecessary spaces.
- Ask them to check their spam or junk folder in case the email ended up there.
- Ask if their inbox is full, new emails might be bounced back or be undelivered.
- Ask the recipient if they have a strict privacy setting that block emails from unknown senders.
- If the above solutions don't work, try resending the invitation:
 - Go to the Organization section of your DOCONCHAIN account.
 - Navigate to the 'Pending' column, where you'll find a list of invitees who haven't accepted the invite.
 - Select the invitee and choose Resend Invitation.



11. Logged out of your Account unexpectedly

- 1) **What's happening:** You've been logged out of your DOCONCHAIN account without taking any action.
- 2) **How to fix it:**
 - **Log in again**
 - **Session time out:** During log in, you selected to be kept logged in, your session automatically logs out after 7 days for security purposes.
 - **Single Browser Limitation:** DOCONCHAIN allows only one active session at a time per account for security reasons. If you log in on another browser or device, it will automatically log you out of the previous session.

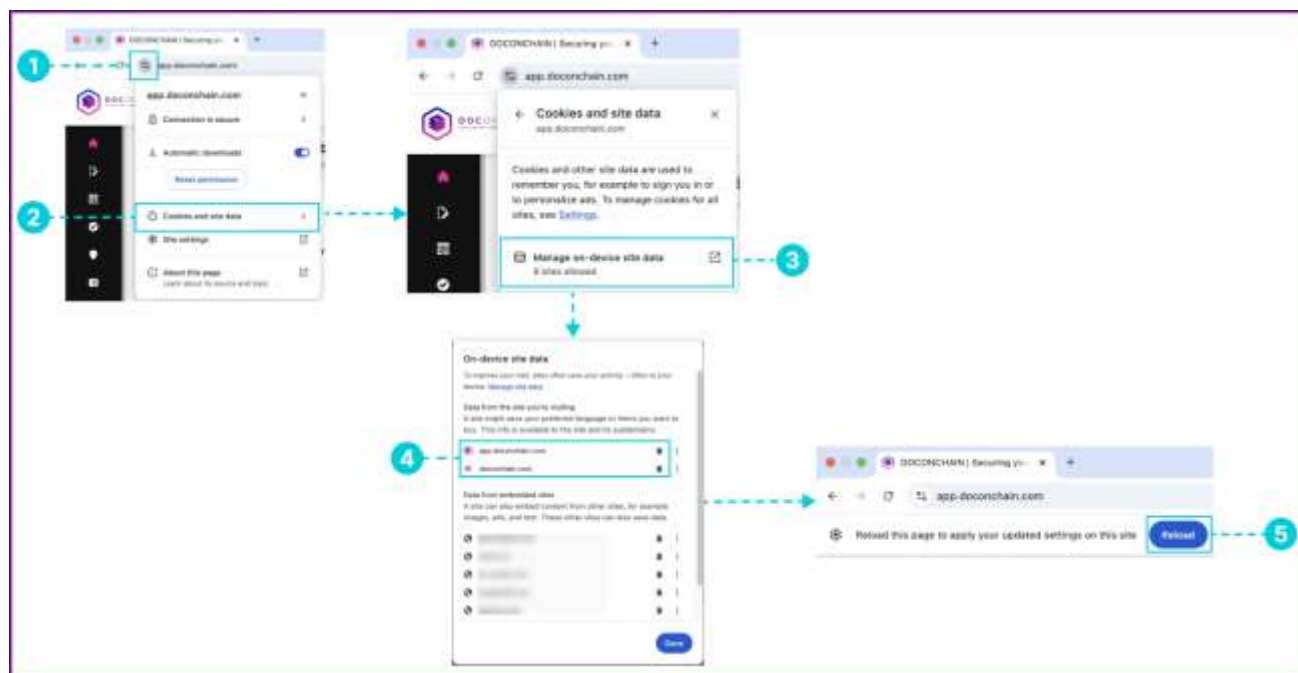
Clearing your Browser Cache

If you experience persistent issues, clearing your browser cache may resolve the problem as your browser automatically saves platform data (to provide faster browsing) which may conflict with a newer version release. Follow the steps below for common browsers:

Web Browsers

Google Chrome

1. Open Chrome and click the icon beside the url in the top-left.
2. Click **Cookies and Site Data**.
3. Click **Manage on-device site data**.
4. Navigate and look for all the URL of DOCONCHAIN and click the delete icon beside of the url.
5. Once done, you need to click **Reload** to refresh your page.





Mozilla Firefox

1. Open Firefox and click the hamburger menu (three lines) in the upper-right corner.
2. Go to Settings > Privacy & Security > Cookies and Site Data.
3. Click Clear Data and ensure Cached Web Content is selected, then click Clear.
4. For more details, visit this link for [Mozilla Firefox](#).

Safari (Mac)

1. Open Safari, click Safari in the top menu, then choose Preferences
2. Go to the Advanced tab and check Show Develop menu in menu bar.
3. Now, in the menu bar, click Develop > Empty Caches.
4. For more details, visit this link for [Safari](#).

Microsoft Edge

1. Open Edge, click the three dots in the upper-right corner, and select Settings.
2. Go to Privacy, search, and services, then under Clear browsing data, click Choose what to clear.
3. Select Cached images and files, and click Clear now.
4. For more details, visit this link for [Microsoft Edge](#).

Mobile

iOS

Clear Safari Cache

1. Open the Settings app.
2. Scroll down and tap Safari.
3. Scroll to the bottom and tap Clear History and Website Data.
4. Confirm by tapping Clear.

Android

Clear Browser Cache (Chrome)

1. Open Chrome.
2. Tap the three dots in the top-right corner and select Settings.
3. Go to Privacy and then Clear browsing data.
4. Select Cached images and files, and tap Clear data.



CONTACT

SUPPORT OFFICE (PHILIPPINES)

Address: Ascott Ayala Center, 7/F, Glorietta 4, Ayala Center, Makati City, 1223, Philippines (by appointment only)

Support email : support@doconchain.com for technical assistance or questions

Sales email : solutions@doconchain.com for commercial questions

Sales phone : +63 917 155 6806 (also on Viber and Whatsapp) for commercial questions

Online meeting : <https://doconchain.com/customer-success> for commercial questions, demos, and trainings

Contact form : www.doconchain.com/contact-us for any other requests