



Sales – Digital signature

ADITO Akademie

As of version 2024.0.1 | 29.04.2024





Screenshots

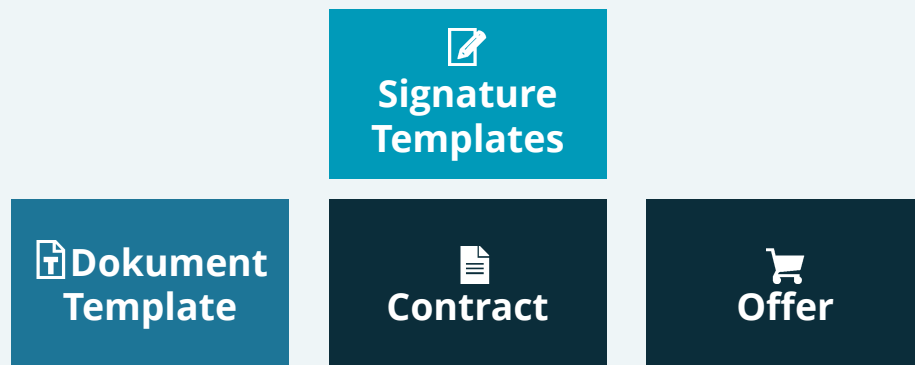
The UX design of ADITO is continuously optimised for you. Therefore, there may be deviations in the screenshots.





Agenda

- [Contexts in connection with the digital signature](#)
- [Context „Signature Templates“](#)
- [Context „Document Template“](#)
- [Add signatories](#)
- [Enter documents for review](#)
- [Request signature in the offer](#)
- [Request signature in the contract](#)
- [Signature link for signatories](#)
- [Procedure in Sign8](#)
- [Status changes with signed offer/contract](#)
- [Reject signing process](#)

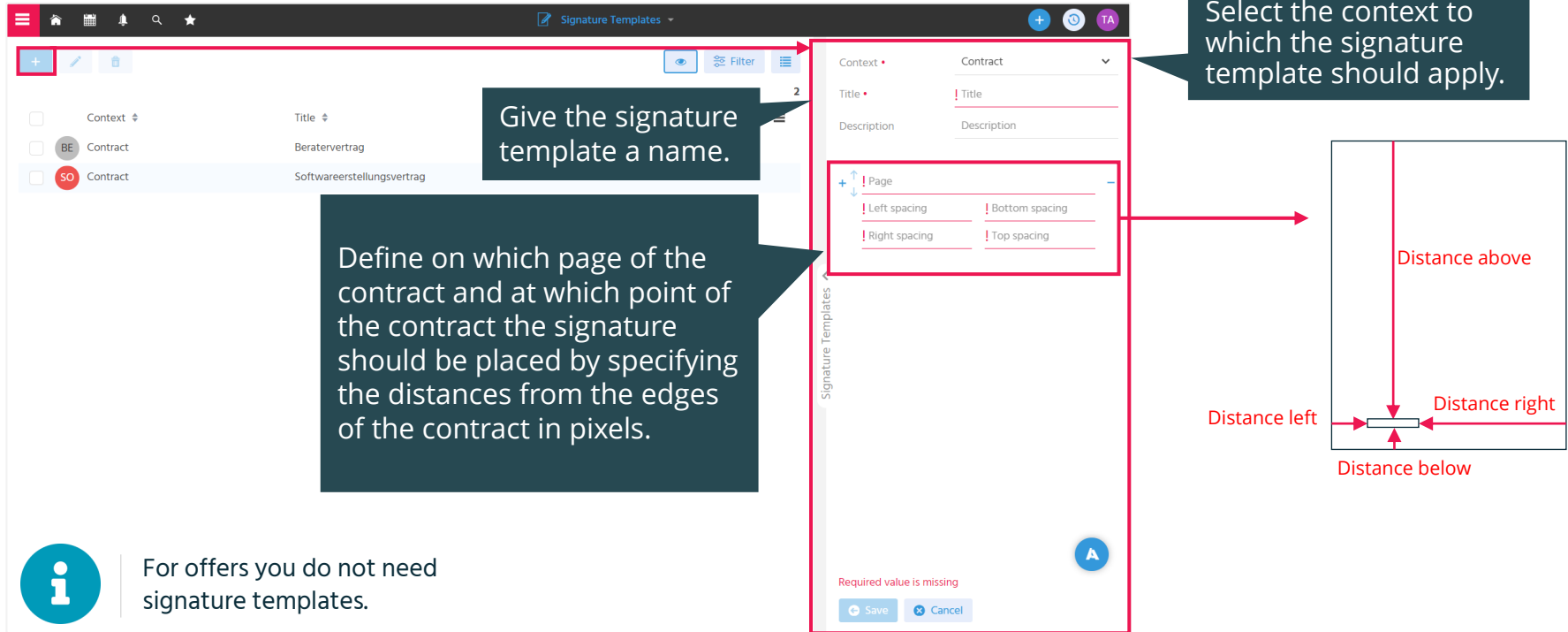


Signature templates are used in contracts if you want to request digital signatures. You don't need signature templates for offers.

-  To be processed in advance by the administrator
-  Occasional adjustment by users
-  Used "daily" by users

Exkursus „Administration“

Context „Signature Templates“



The screenshot shows the ADITO administration interface for Signature Templates. The interface includes a sidebar with a list of contexts (Context, BE Contract, SO Contract) and a main panel for editing a selected context. The main panel has fields for Title, Description, and Page, as well as spacing options (Left, Right, Top, Bottom). A diagram on the right illustrates the spacing parameters: Distance above, Distance below, Distance left, and Distance right.

Give the signature template a name.

Define on which page of the contract and at which point of the contract the signature should be placed by specifying the distances from the edges of the contract in pixels.

Select the context to which the signature template should apply.

Distance above

Distance below

Distance left

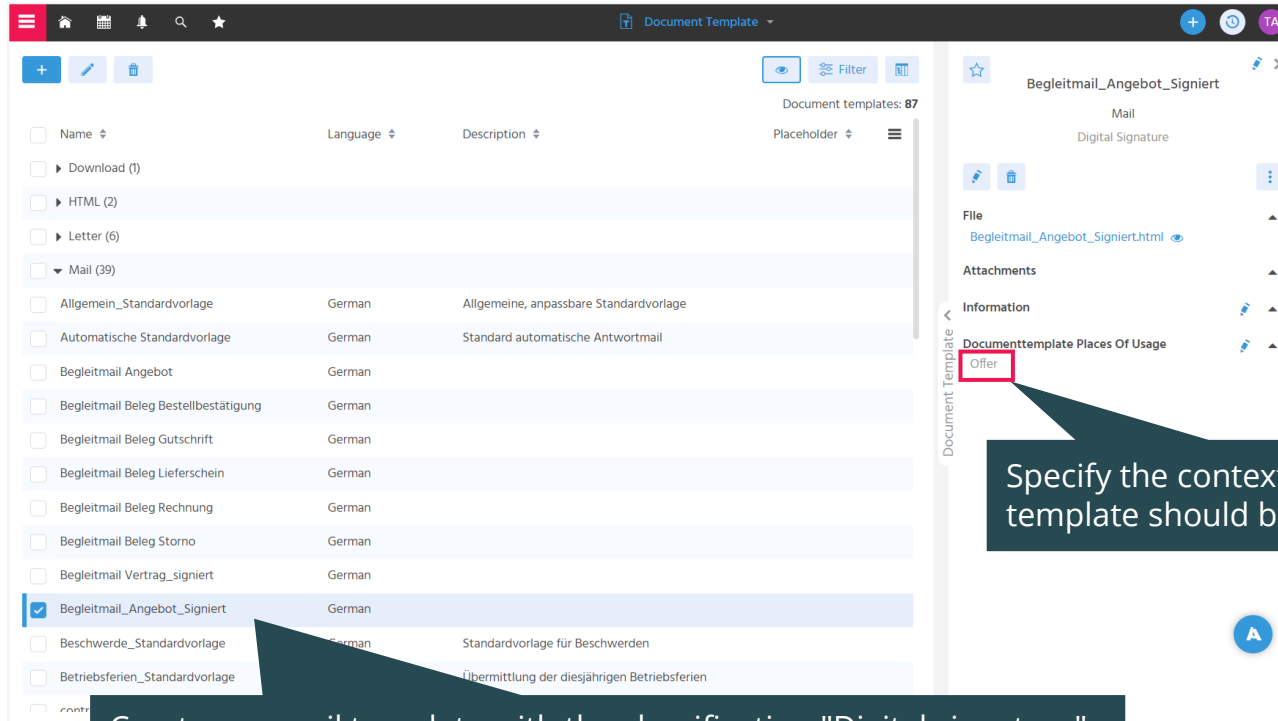
Distance right

Required value is missing

Save Cancel

For offers you do not need signature templates.

Exkurs „Document Template“



Document templates: 87

Name	Language	Description	Placeholder
Download (1)			
HTML (2)			
Letter (6)			
Mail (39)			
Allgemein_Standardvorlage	German	Allgemeine, anpassbare Standardvorlage	
Automatische Standardvorlage	German	Standard automatische Antwortmail	
Begleitmail Angebot	German		
Begleitmail Beleg Bestellbestätigung	German		
Begleitmail Beleg Gutschrift	German		
Begleitmail Beleg Lieferschein	German		
Begleitmail Beleg Rechnung	German		
Begleitmail Beleg Storno	German		
Begleitmail Vertrag_signiert	German		
Begleitmail_Angebot_Signiert	German		
Beschwerde_Standardvorlage	German	Standardvorlage für Beschwerden	
Betriebsferien_Standardvorlage		Übermittlung der diesjährigen Betriebsferien	

Begleitmail_Angebot_Signiert

Mail

Digital Signature

File

Begleitmail_Angebot_Signiert.html

Attachments

Information

Documenttemplate Places Of Usage

Offer

Specify the contexts in which the template should be selectable.

Create an email template with the classification "Digital signature". Insert the placeholder "{@signateLink@}" in the template text. A link is automatically inserted there when the email is created, which can be used to start the signing process.

Digital Signature



Add signatories to the offer/contract

Contact	Status	Email	Phone	Reason for rejection
PE Tom Weiß	pending	t.weiss@skyscraper-bau.de	+49 711 8754-32	

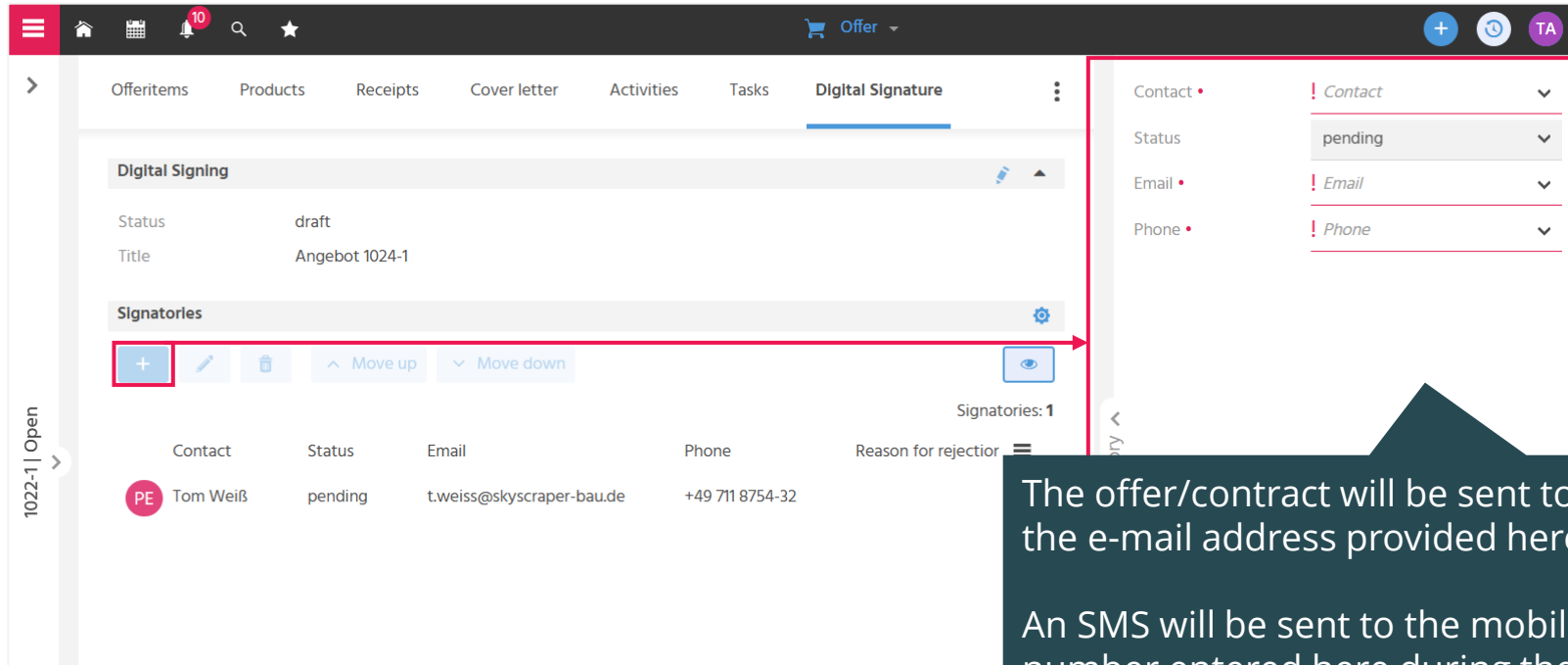
You can store one or more contacts in the "Digital signature" tab. When the offer/contract is sent by email, all contacts stored here will receive the request to sign the offer/contract.

If you enter the contact of a company as a recipient when creating the offer/contract and a valid e-mail address and a valid mobile number are stored for the contact, this contact is automatically stored in the "Digital Signature" tab.



Digital Signature

Add signatories to the offer/contract



1022-1 | Open

Offeritems Products Receipts Cover letter Activities Tasks Digital Signature

Digital Signing

Status draft

Title Angebot 1024-1

Signatories

+ ✎ 🗑️ ⬆️ Move up ⬇️ Move down 👁️

Signatories: 1

Contact	Status	Email	Phone	Reason for rejection
PE Tom Weiß	pending	t.weiss@skyscraper-bau.de	+49 711 8754-32	

Side Panel:

Contact • ! Contact

Status pending

Email • ! Email

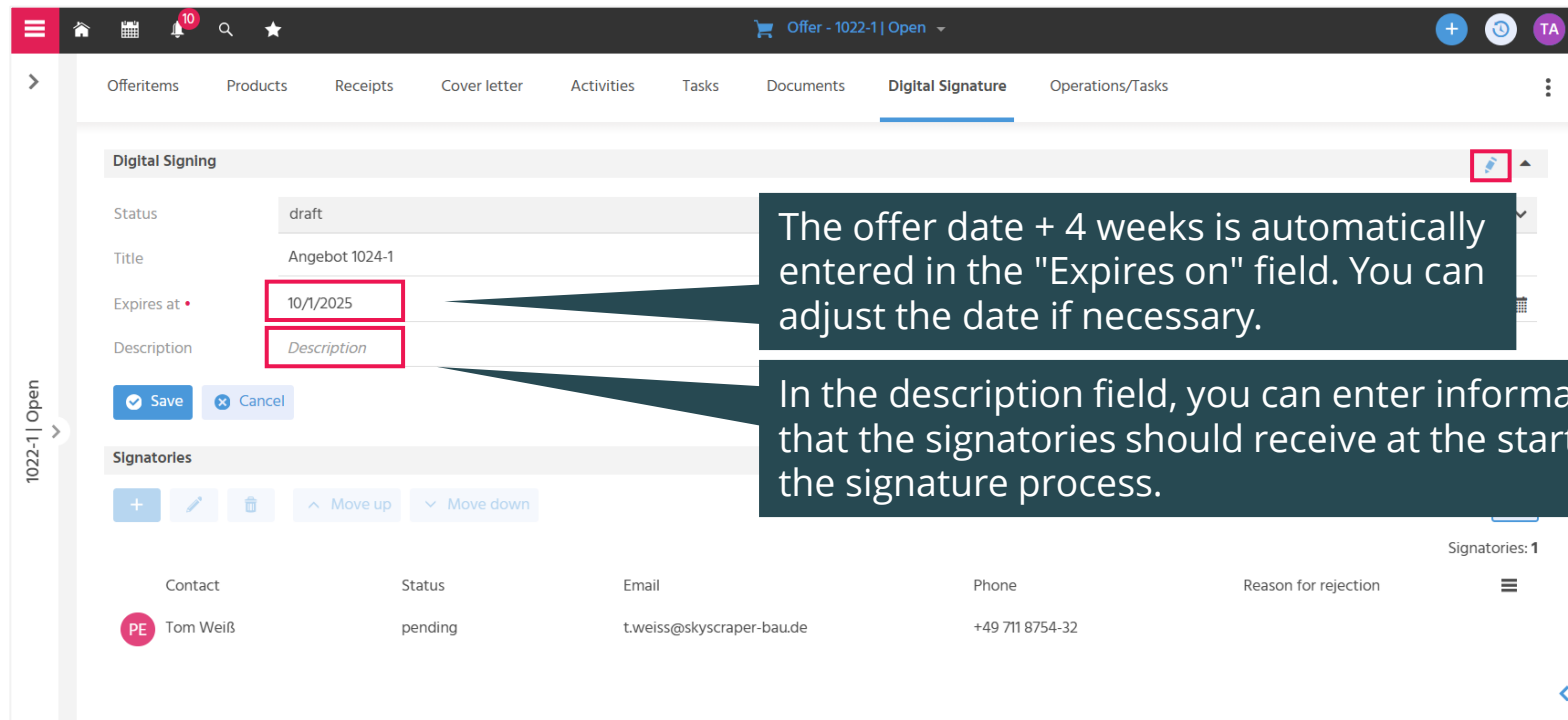
Phone • ! Phone

The offer/contract will be sent to the e-mail address provided here.

An SMS will be sent to the mobile number entered here during the offer/contract signing process.

Digital Signature

Add description



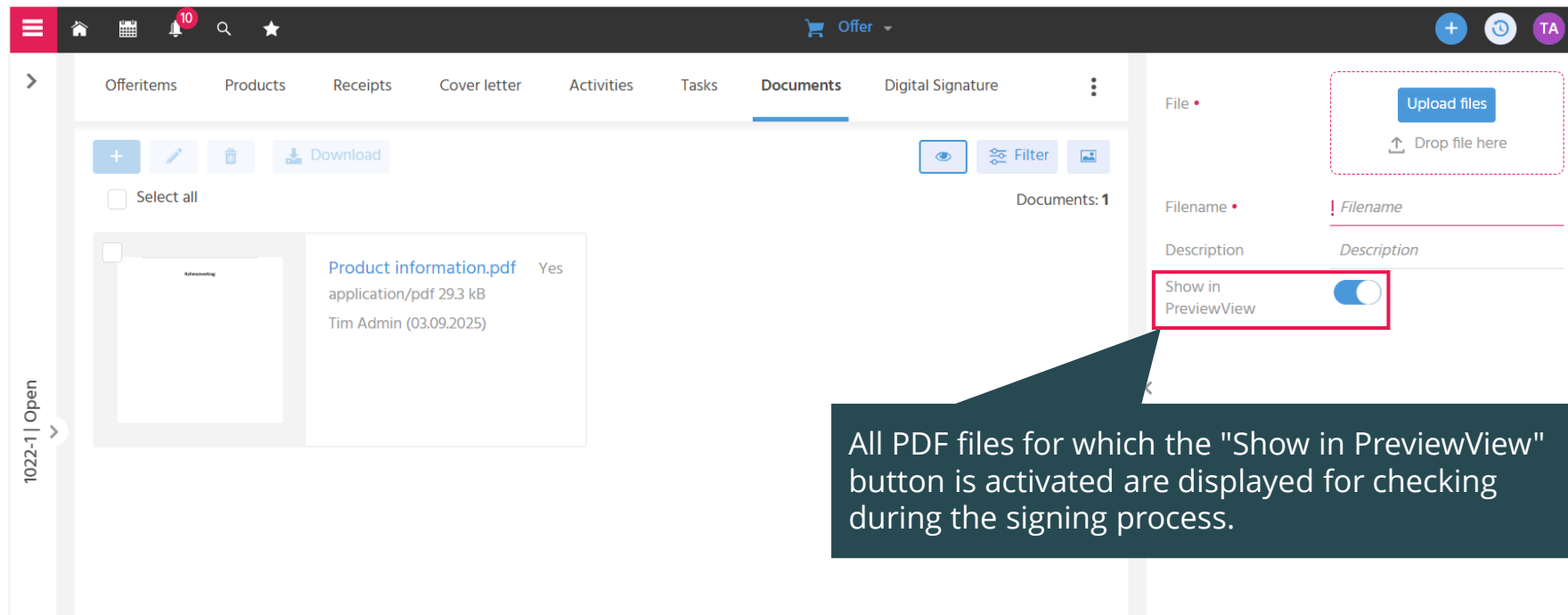
The screenshot shows the ADITO Digital Signature interface. The top navigation bar includes a menu icon, home, calendar, notifications (10), search, and star icons. The main header shows 'Offer - 1022-1 | Open' with a dropdown arrow. The left sidebar has a vertical label '1022-1 | Open' and a right arrow. The main content area has a tabbed interface with 'Digital Signature' selected. The form fields are: Status (draft), Title (Angebot 1024-1), Expires at (10/1/2025), and Description (Description). The 'Expires at' and 'Description' fields are highlighted with red boxes. Below the form are 'Save' and 'Cancel' buttons. The 'Signatories' section shows a table with one entry: Tom Weiß (PE), pending, t.weiss@skyscraper-bau.de, +49 711 8754-32. The table has columns for Contact, Status, Email, Phone, and Reason for rejection. The 'Signatories' count is 1.

The offer date + 4 weeks is automatically entered in the "Expires on" field. You can adjust the date if necessary.

In the description field, you can enter information that the signatories should receive at the start of the signature process.

Digital Signature

Marked documents are also sent



The screenshot shows the ADITO digital signature interface. The 'Documents' tab is active, displaying a list of documents. A callout box points to the 'Show in PreviewView' toggle switch, which is currently turned on.

1022-1 | Open

Offeritems Products Receipts Cover letter Activities Tasks Documents Digital Signature

File • Upload files Drop file here

Filename • ! Filename

Description Description

Show in PreviewView ☒

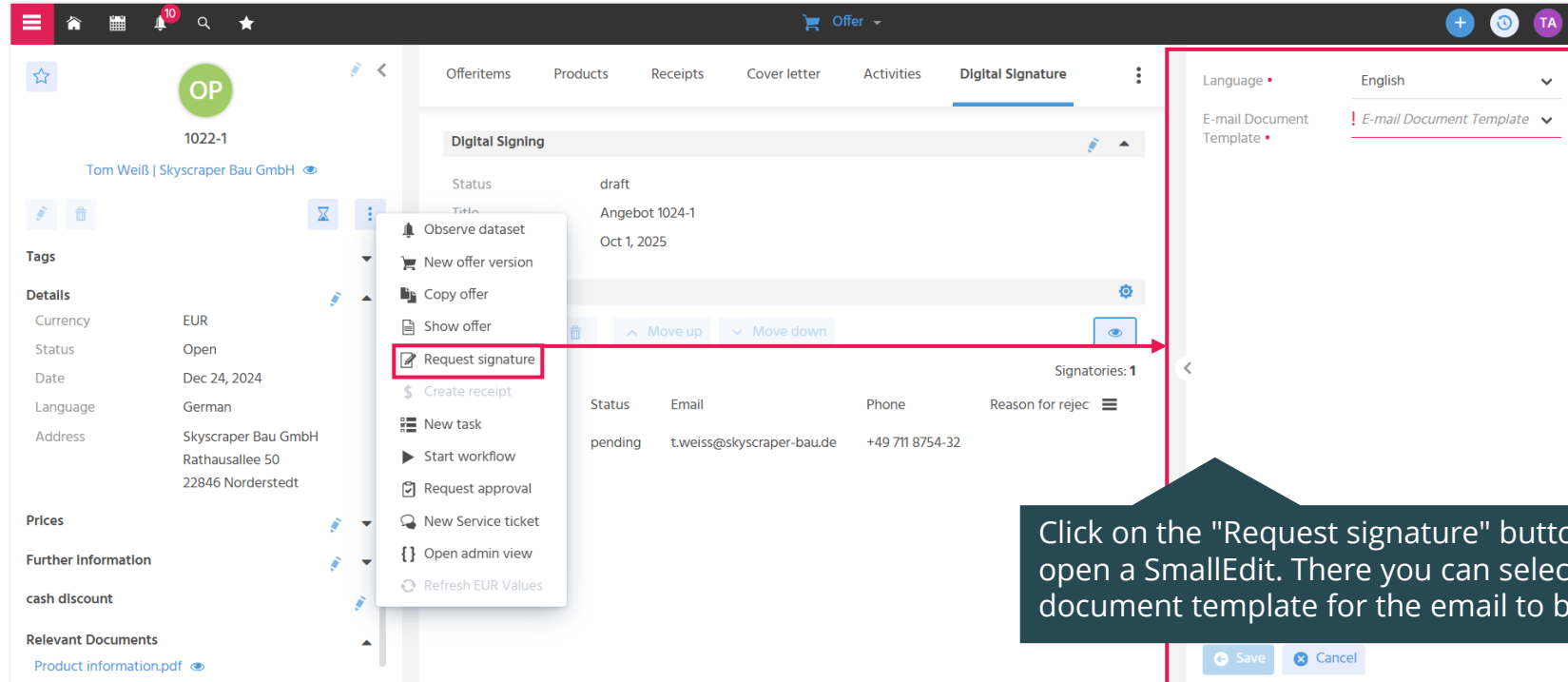
Documents: 1

Product information.pdf Yes
application/pdf 29.3 kB
Tim Admin (03.09.2025)

All PDF files for which the "Show in PreviewView" button is activated are displayed for checking during the signing process.

Digital Signature – only „Offer“

Request signature in the offer



The screenshot shows the ADITO interface with the 'Digital Signature' tab selected. A context menu is open over the 'Request signature' button, which is highlighted with a red box. A red arrow points from this button to a 'SmallEdit' dialog box on the right. The dialog box contains the following fields:

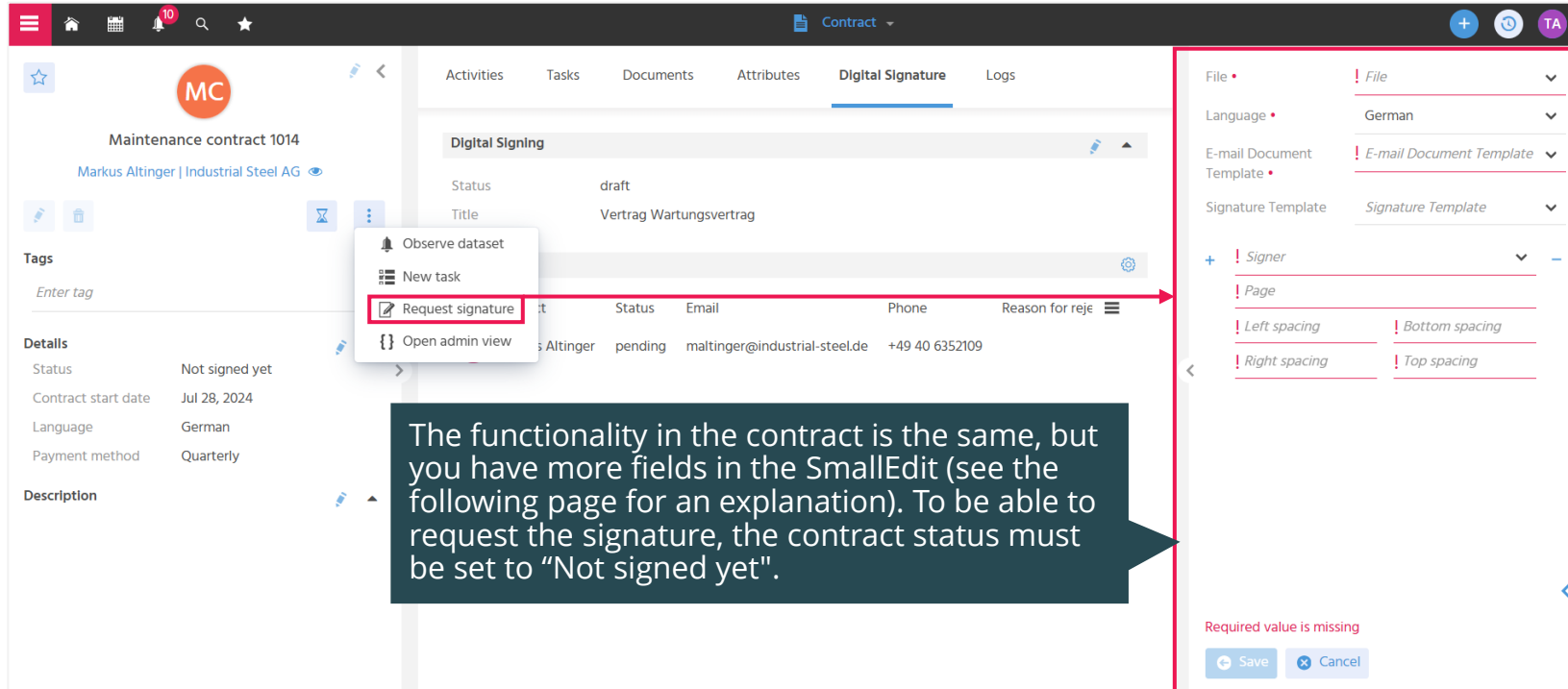
- Language: English
- E-mail Document Template: E-mail Document Template

At the bottom of the dialog are 'Save' and 'Cancel' buttons. A dark blue callout box with white text is positioned over the dialog, providing instructions:

Click on the "Request signature" button to open a SmallEdit. There you can select a document template for the email to be sent.

Digital Signature – only „contract“

Request signature in the contract



The functionality in the contract is the same, but you have more fields in the SmallEdit (see the following page for an explanation). To be able to request the signature, the contract status must be set to "Not signed yet".

Required value is missing

Save Cancel

Digital Signature – only „contract“

Request signature in the contract

All PDF files stored in the "Documents" tab are available for selection under "File". Select the file to be signed here.

As "Signers", you can select all contacts that you have stored in the "Digital signature" tab.

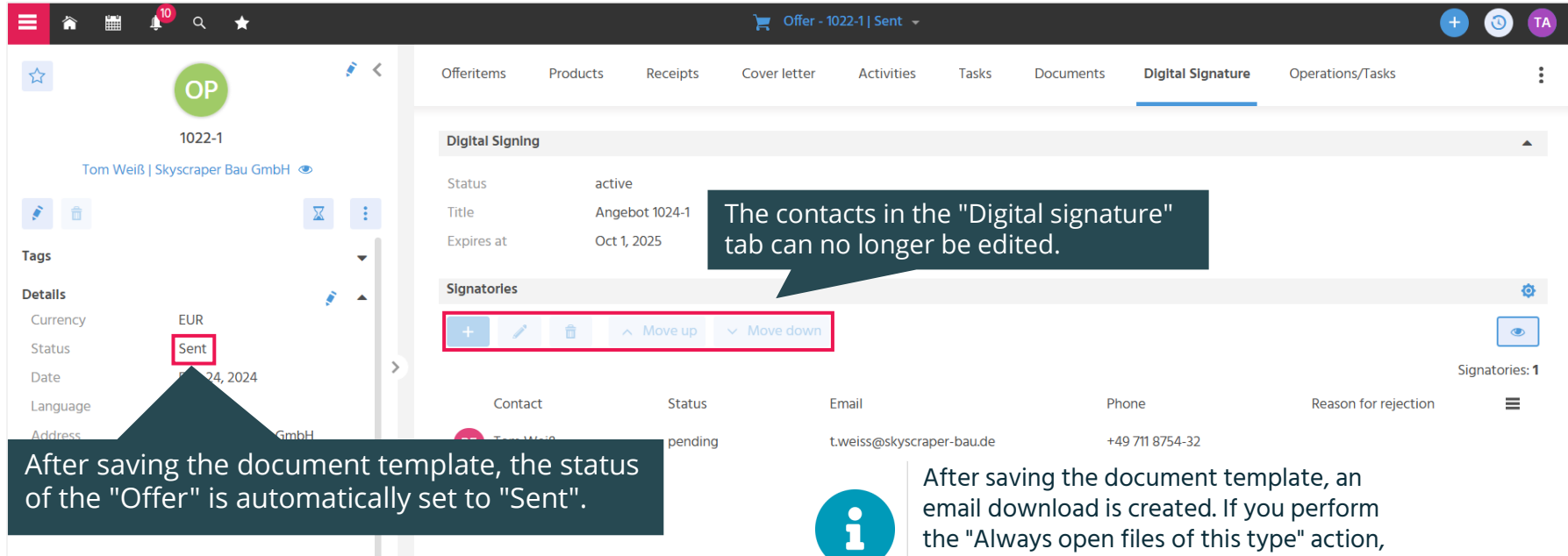
File •	! File	▼
Language •	German	▼
E-mail Document Template •	! E-mail Document Template	▼
Signature Template	Signature Template	
	! Signer	▼
	! Page	
	! Left spacing	! Bottom spacing
	! Right spacing	! Top spacing

Select the template whose text is to be included in the e-mail to be sent.

If you select a signature template here, the "Page" field and all "Spacing" fields are filled automatically. If you do not select a signature template, you must enter the details manually.

Digital Signature – only „offer“

After saving the document template



The screenshot shows the ADITO interface with the 'Digital Signature' tab selected. The offer '1022-1' is shown with a status of 'Sent'. A callout box points to the 'Sent' status, stating: 'After saving the document template, the status of the "Offer" is automatically set to "Sent".' Another callout box points to the 'Digital Signing' section, stating: 'The contacts in the "Digital signature" tab can no longer be edited.' A third callout box points to the 'Signatories' section, stating: 'After saving the document template, an email download is created. If you perform the "Always open files of this type" action, the automatically created emails will be opened immediately in future.'

Offer - 1022-1 | Sent

Offeritems Products Receipts Cover letter Activities Tasks Documents **Digital Signature** Operations/Tasks

Digital Signing

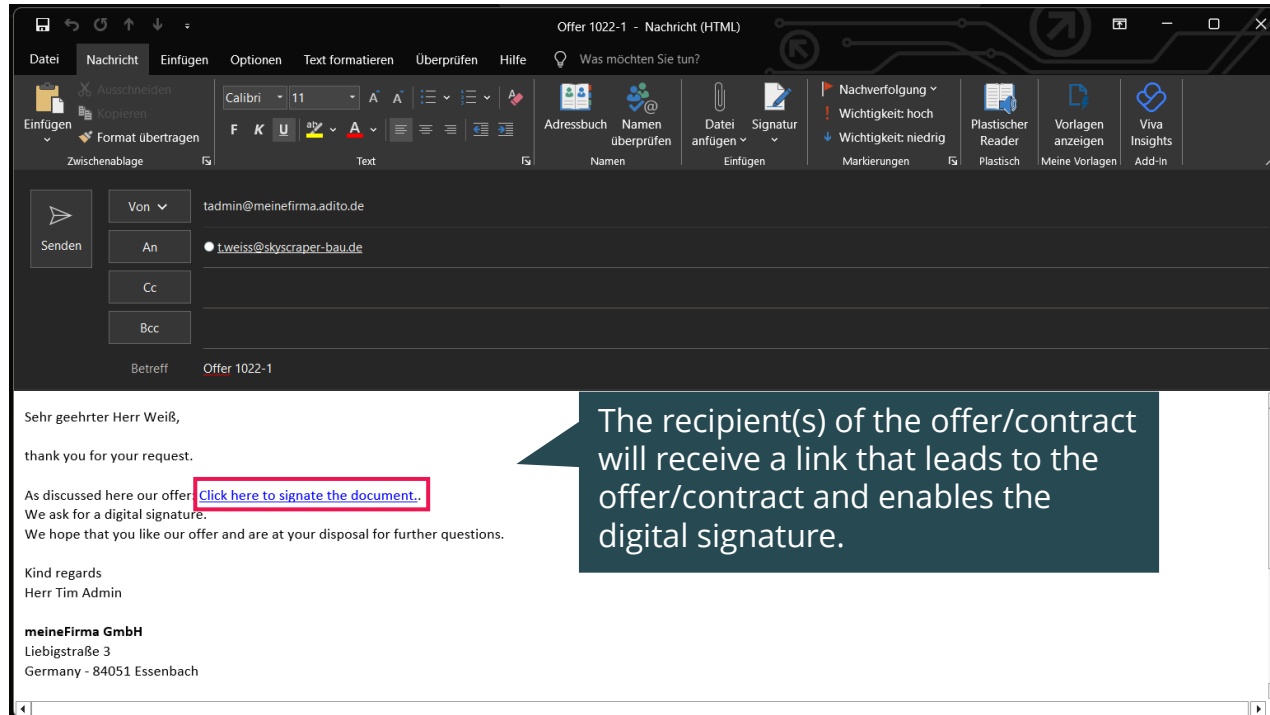
Status active
Title Angebot 1024-1
Expires at Oct 1, 2025

Signatories

Contact	Status	Email	Phone	Reason for rejection
Tom Weiß	pending	t.weiss@skyscraper-bau.de	+49 711 8754-32	

Digital Signature

Signing the offer/contract



Offer 1022-1 - Nachricht (HTML)

Was möchten Sie tun?

Senden

Von: tadmin@meinefirma.adito.de

An: t.weiss@skyscraper-bau.de

Cc:

Bcc:

Betreff: Offer 1022-1

Sehr geehrter Herr Weiß,

thank you for your request.

As discussed here our offer [Click here to signate the document.](#)

We ask for a digital signature.

We hope that you like our offer and are at your disposal for further questions.

Kind regards

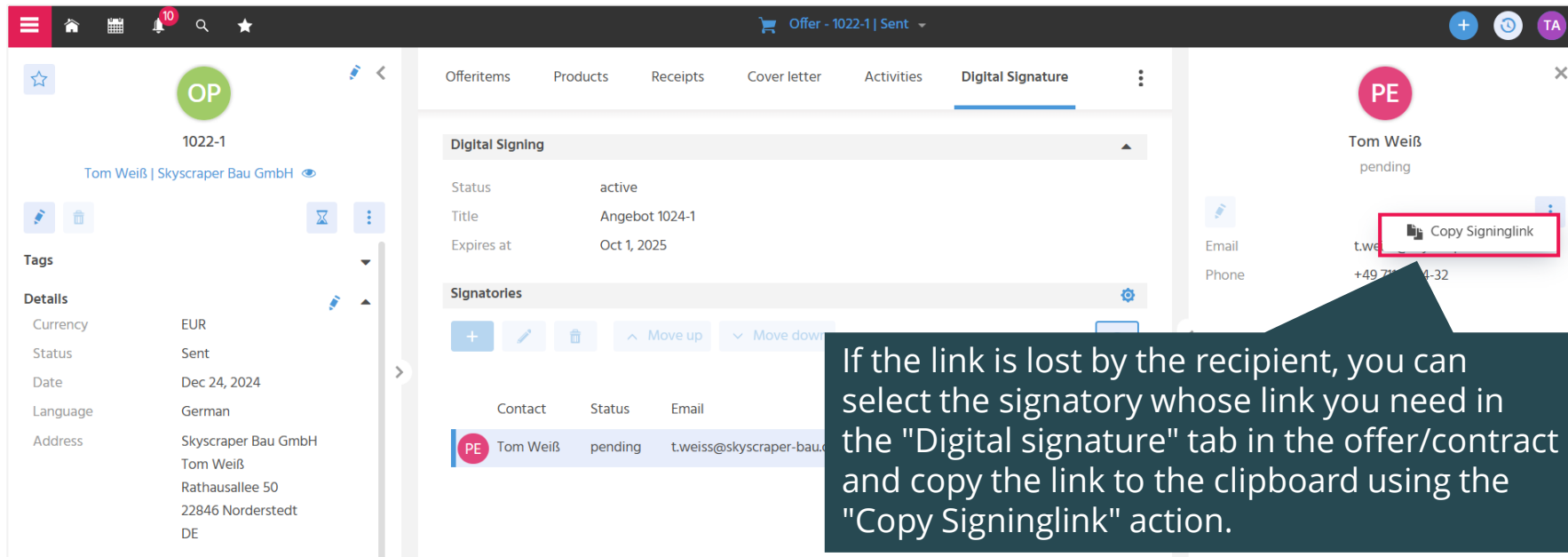
Herr Tim Admin

meineFirma GmbH
Liebigstraße 3
Germany - 84051 Essenbach

The recipient(s) of the offer/contract will receive a link that leads to the offer/contract and enables the digital signature.

Digital Signature

Signing the offer/contract

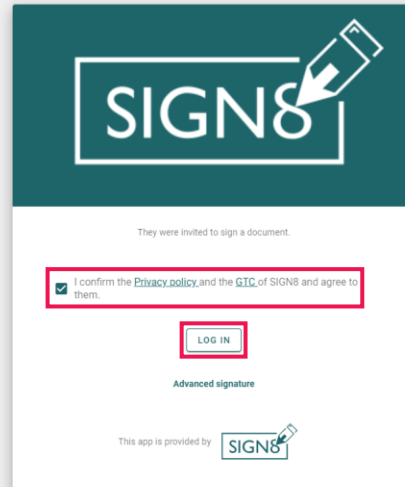


The screenshot displays the ADITO interface for managing digital signatures. The main panel is titled 'Offer - 1022-1 | Sent' and features a 'Digital Signature' tab. The 'Digital Signing' section shows the status as 'active', the title as 'Angebot 1024-1', and the expiration date as 'Oct 1, 2025'. The 'Signatories' section lists the signatory 'Tom Weiß' with a status of 'pending' and an email address 't.weiss@skyscraper-bau.de'. A red box highlights the 'Copy Signinglink' button in the right panel, which is used to copy the signing link to the clipboard.

If the link is lost by the recipient, you can select the signatory whose link you need in the "Digital signature" tab in the offer/contract and copy the link to the clipboard using the "Copy Signinglink" action.

Digital Signature

Log in to Sign8



The image shows a web interface for Sign8. At the top, there is a dark teal header with the 'SIGN8' logo in white, which includes a stylized pen icon. Below the header, the text 'They were invited to sign a document.' is displayed. A red rectangular box highlights a checkbox that is checked, with the text 'I confirm the [Privacy policy](#) and the [GTC](#) of SIGN8 and agree to them.' Below this box is a 'LOG IN' button, also highlighted with a red rectangular box. Underneath the button, the text 'Advanced signature' is visible. At the bottom, it says 'This app is provided by' followed by the Sign8 logo.

The link takes the recipient to a registration form. To be able to register, the recipient must agree to the data protection provisions and the GTC.

Digital Signature

Sign8 – Check contact details

Sign

1 Check contact details

2 Review document

3 Authenticate

4 Summary

WORKFLOW

Name	Expires on
Angebot 1024-1	22.07.2024
Description	
No description was given	

INITIATOR

First name	Last name
Tim	Admin

SIGNING

1 Please review your personal information carefully. This information is used for identification purposes.

First name	Last name
Tom	Weiß
E-mail	Phone number
t.weiss@skyscraper-bau.de	+497118754-32

REJECT SIGNING OPERATION

CONFIRM CONTACT DETAILS

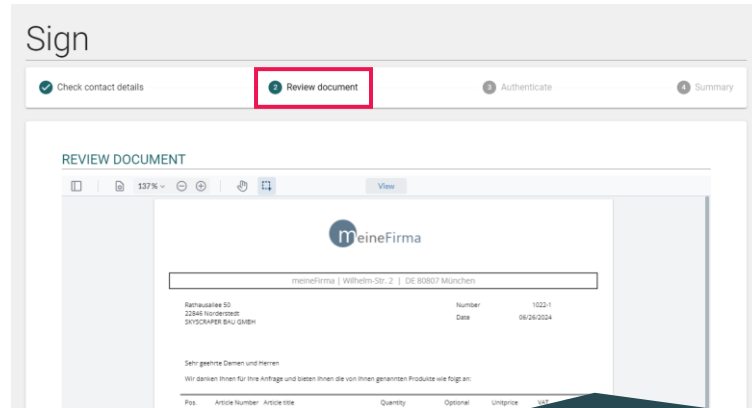
2024 – © SIGN8 GmbH | [IMPRINT AND DATA PROTECTION](#) | [GTC](#)

Once the recipient has logged in, a workflow starts that guides them through the signing process. First, the recipient must check their data. If they are correct, they can confirm the contact details.

Digital Signature

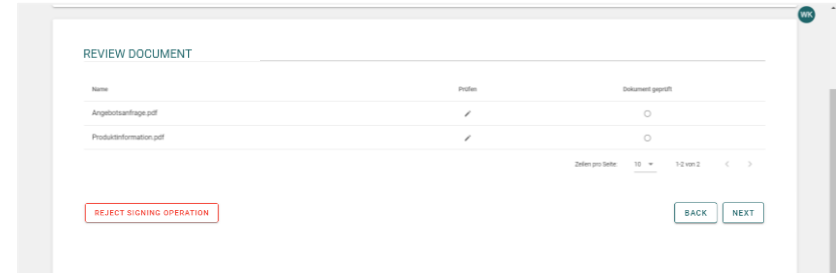
Sign8 – Check document

No document with “Show in PreviewView” = Yes stored with the offer



If you have not saved a document with “Show in PreviewView” = Yes in PDF format with the offer, the offer is immediately displayed for you to check in the “Review document” step.

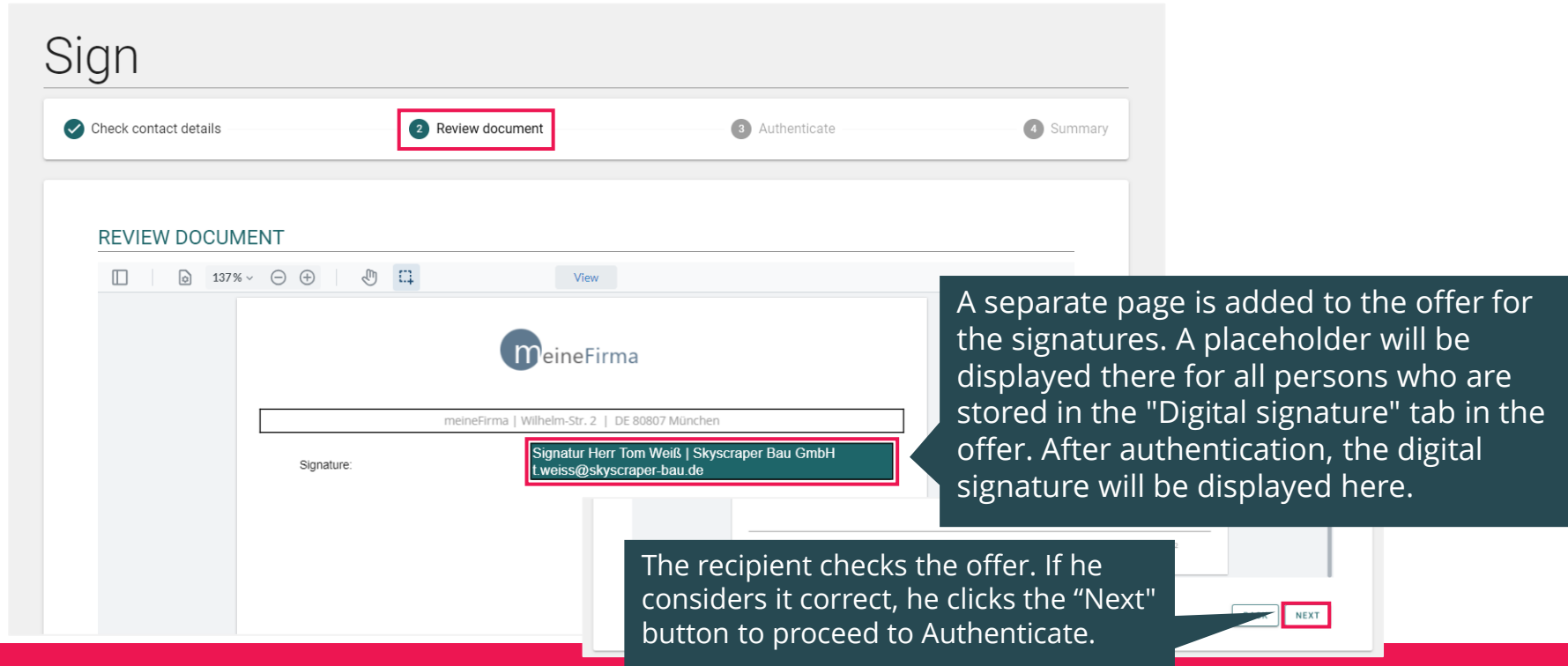
Document with “Show in PreviewView” = Yes stored with the offer



If you have saved one or more documents with “Show in PreviewView” = Yes in PDF format with the offer, the offer and all documents marked and in PDF format will be displayed for you to check in the “Review document” step.

Digital Signature – only „offer“

Sign8 – Check offer



Sign

1 Check contact details 2 Review document 3 Authenticate 4 Summary

REVIEW DOCUMENT

meineFirma

meineFirma | Wilhelm-Str. 2 | DE 80807 München

Signature: Signatur Herr Tom Weiß | Skyscraper Bau GmbH
t.weiss@skyscraper-bau.de

NEXT

A separate page is added to the offer for the signatures. A placeholder will be displayed there for all persons who are stored in the "Digital signature" tab in the offer. After authentication, the digital signature will be displayed here.

The recipient checks the offer. If he considers it correct, he clicks the "Next" button to proceed to Authenticate.

Digital Signature

Sign8 – Check document - One or more documents with “Show in PreviewView” stored in the offer

WK

Signieren

✓ Kontaktdaten überprüfen

2 Dokument überprüfen

3 Authentifizieren

4 Zusammenfassung

DOKUMENT ÜBERPRÜFEN

Name	Prüfen	Dokument geprüft
Angebotsanfrage.pdf		☐
Produktinformation.pdf		☐

SIGNIERVORGANG ABLEHNEN

ZURÜCK

WEITER

Zeilen pro Seite: 10 1-2 von 2 < >

The recipient clicks on the Edit button to call up a document for checking.

Digital Signature

Sign8 – Check document - One or more documents with “Show in PreviewView” stored in the offer

WK

Signieren

✓ Kontaktdaten überprüfen

2 Dokument überprüfen

3 Authentifizieren

4 Zusammenfassung

Documents that have already been confirmed are ticked off in the "Document checked" column.

DOKUMENT ÜBERPRÜFEN

Name	Prüfen	Dokument geprüft
Angebotsanfrage.pdf		☒
Produktinformation.pdf		☐

Zeilen pro Seite: 10 1-2 von 2 < >

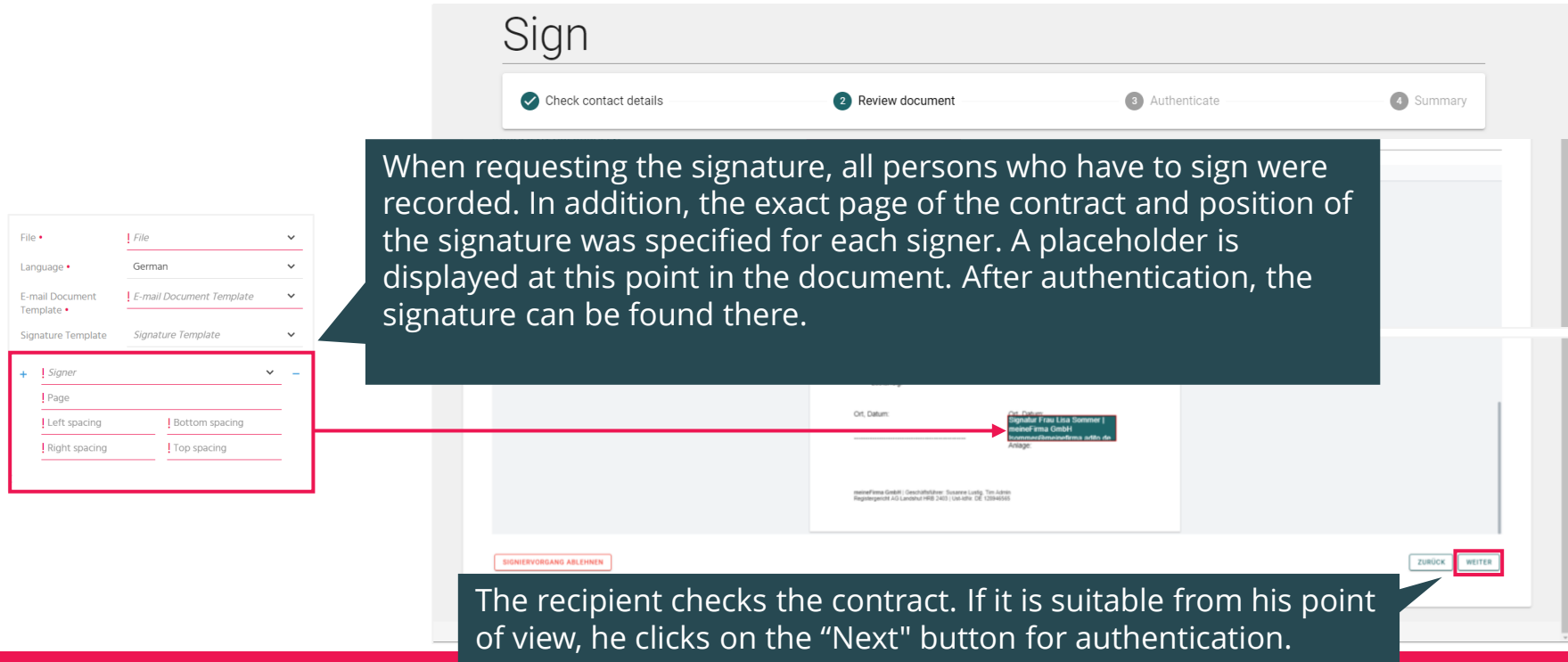
SIGNIERVORGANG ABLEHNEN

ZURÜCK

WEITER

Digital Signature – only „contract“

Sign8 – Check document



Sign

1 Check contact details 2 Review document 3 Authenticate 4 Summary

When requesting the signature, all persons who have to sign were recorded. In addition, the exact page of the contract and position of the signature was specified for each signer. A placeholder is displayed at this point in the document. After authentication, the signature can be found there.

File • File
Language • German
E-mail Document Template • E-mail Document Template
Signature Template Signature Template

+ ! Signer
! Page
! Left spacing ! Bottom spacing
! Right spacing ! Top spacing

Ort, Datum:

Ort, Datum:
Signatur Frau Lisa Sommer
maedelfirma GmbH
maedelfirma GmbH
maedelfirma GmbH

SIGNERVORGANG ABLEHNEN

ZURÜCK WEITER

The recipient checks the contract. If it is suitable from his point of view, he clicks on the "Next" button for authentication.

Digital Signature

Sign8 - Authenticate

Sign

✓ Check contact details

✓ Review document

3 Authenticate

4 Summary

AUTHENTICATION

SMS

 You will receive an SMS with a 6-digit code.

Phone number

 You will receive a call in which you will be given a 6-digit code.

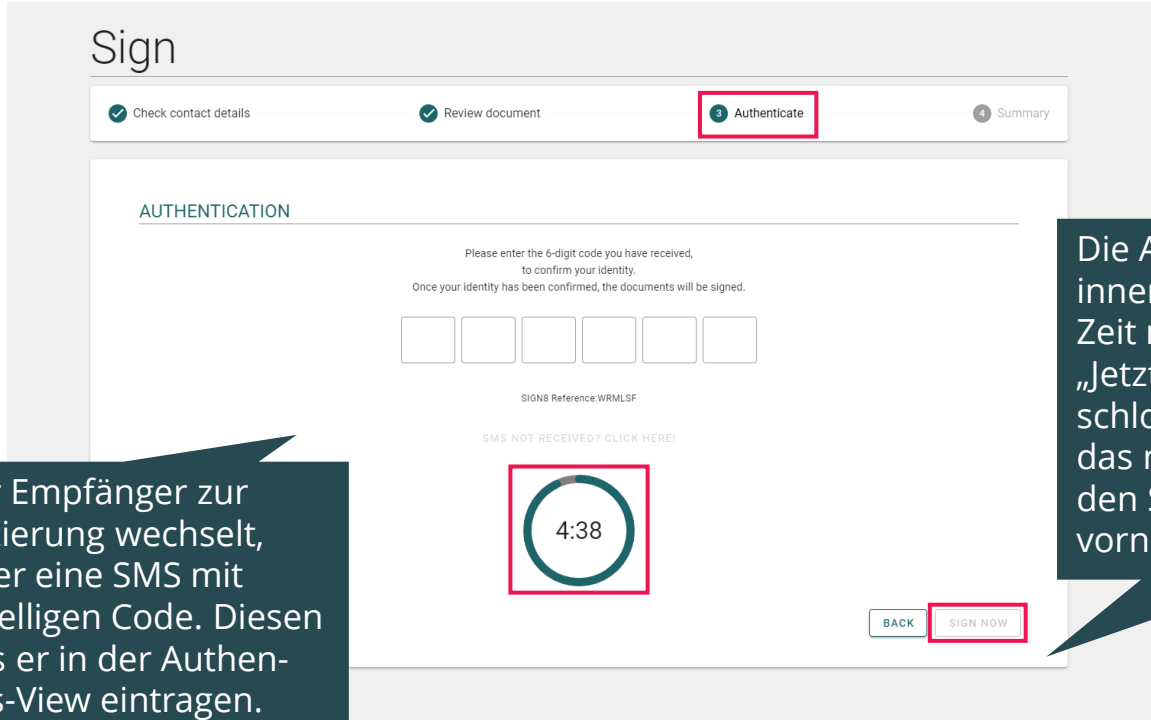
REJECT SIGNING OPERATION

BACK

To be able to sign the document, you need a 6-digit code. Select here whether you would like to receive the code by SMS or by phone call.

Digital Signature

Sign8 - Authentifizieren



The screenshot shows the 'Sign' interface with a progress bar at the top containing four steps: 'Check contact details', 'Review document', 'Authenticate' (highlighted with a red box), and 'Summary'. Below the progress bar, the 'AUTHENTICATION' section contains instructions: 'Please enter the 6-digit code you have received, to confirm your identity. Once your identity has been confirmed, the documents will be signed.' This is followed by a row of six empty input boxes. Below the boxes, the text 'SIGN8 Reference: WRMLSF' and 'SMS NOT RECEIVED? CLICK HERE!' are visible. A circular timer showing '4:38' is highlighted with a red box. At the bottom right, there are 'BACK' and 'SIGN NOW' buttons, with the 'SIGN NOW' button highlighted by a red box.

Sobald der Empfänger zur Authentifizierung wechselt, bekommt er eine SMS mit einem 6-stelligen Code. Diesen Code muss er in der Authentifizierungs-View eintragen.

Die Authentifizierung muss innerhalb der vorgegebenen Zeit mit Klick auf den Button „Jetzt signieren“ abgeschlossen werden. Wenn das nicht klappt, muss man den Signiervorgang von vorne starten.

Digital Signature

Sign8 - Summary

Summary

WORKFLOW: ANGEBOT 1028-1

 Congratulations! The documents have been successfully signed. You will be notified by email as soon as all signatures are completed

SIGNING

First name
Tom

Last name
Weiß

DOCUMENTS

File name ↓

Audit_Report_Angelbot 1028-1 .pdf

Angebot 1028-1 .pdf

1-2 von 2 < >

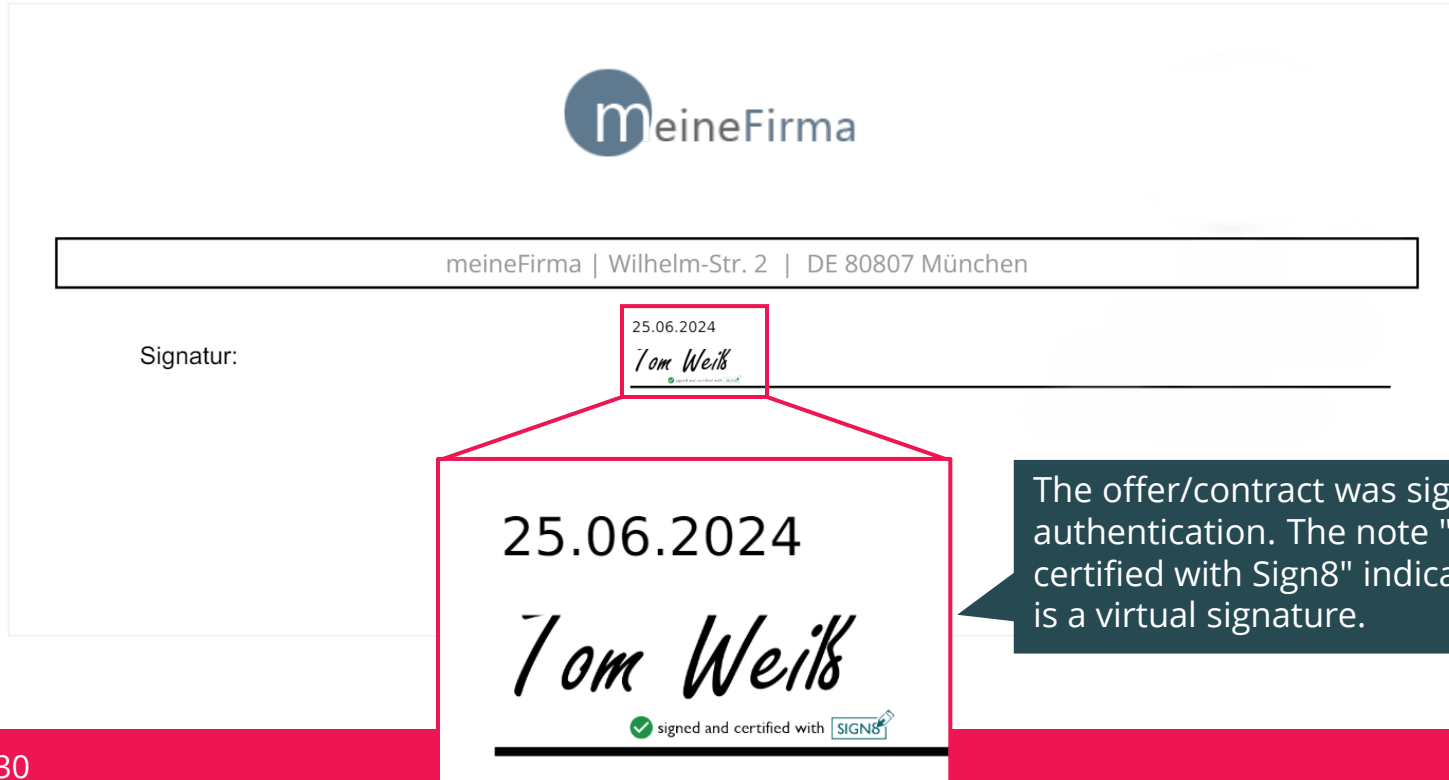
The recipient has the option of downloading the signed offer, the documents with “Show in PreviewView” = Yes (if available) and a report that serves as proof of the signature.



The certificate can [here](#) be revoked.
More information: sign8.eu/trust

Digital Signature

Signature



The screenshot shows a digital signature interface. At the top is the 'meineFirma' logo. Below it is a horizontal bar containing the text 'meineFirma | Wilhelm-Str. 2 | DE 80807 München'. Underneath this bar, the word 'Signatur:' is followed by a signature box. This box contains the date '25.06.2024', a handwritten signature 'Tom Weiß', and a small green checkmark icon. A red box highlights the signature box, and a red line connects it to a larger, detailed view of the signature below. This detailed view shows the date '25.06.2024', the signature 'Tom Weiß', and a green checkmark icon with the text 'signed and certified with SIGN8'.

meineFirma

meineFirma | Wilhelm-Str. 2 | DE 80807 München

Signatur:

25.06.2024
Tom Weiß

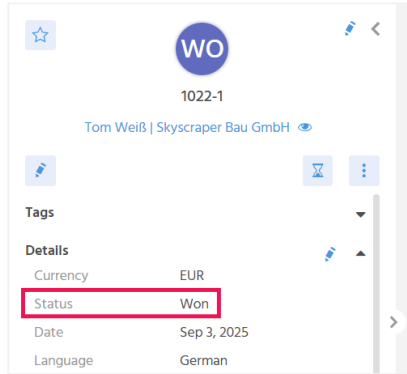
25.06.2024
Tom Weiß

signed and certified with SIGN8

The offer/contract was signed through authentication. The note "signed and certified with Sign8" indicates that this is a virtual signature.

Digital Signature

Status changes



WO

1022-1

Tom Weiß | Skyscraper Bau GmbH

Tags

Details

Currency EUR

Status Won

Date Sep 3, 2025

Language German



MC

Maintenance contract 1014

Herr Markus Altinger | Industrial Steel AG

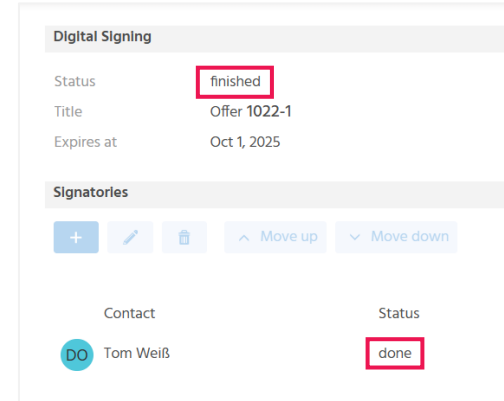
Tags

Enter tag

Details

Status Valid, unlimited

Contract start date 2 Jul 2023



Digital Signing

Status finished

Title Offer 1022-1

Expires at Oct 1, 2025

Signatories

+ Edit Delete Move up Move down

Contact	Status
DO Tom Weiß	done

As soon as all recipients have signed the offer, the status in the offer automatically changes to "Won". In the contract, it changes to "valid, unlimited". The signed offer/contract and the report are also stored in the "Documents" tab.

As soon as a recipient has completed the authentication with "Sign now", the status of the contact in the offer/contract in the "Digital signature" tab is set to "done" and the status of the digital signature is set to "finished".

Digital Signature

Reject signing operation

Sign

1 Check contact details 2 Review document

WORKFLOW

Name
Angebot 1024-1

Expires on
22.07.2024

Description
No description was given

INITIATOR

First name
Tim

SIGNING

1 Please review your personal information carefully

First name
Tom

Last name
Weiß

E-mail
t.weiss@skyscraper-bau.de

Phone number
+49 11 8754-32

REJECT SIGNING OPERATION

CONFIRM CONTACT DETAILS

Reject Workflow

Please provide a reason why you do not want to sign this workflow:

Enter comment here

CANCEL SAVE

If the recipient rejects the signing process, they receive a pop-up in which they can explain why they do not wish to sign the offer/contract.

In the offer/contract, the status for the contact and in the "Digital signing" area changes to "Refused". If the recipient has given a reason why they did not want to sign, you will find this in the "Refuse message" column.

Want to sign, you will find this "Refuse message" column.

Digital Signing

Status **refused**
Title Offer 1024-1
Expires at Oct 1, 2025

Signatories

+ Move up - Move down

Signatories: 1

Contact	Status	Email	Phone	Reason for rejection
 Tom Weiss	refused	t.weiss@skyscraper-bau.de	+49 176 64144652	Offer amount too high

1030-1 | Approval denied

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