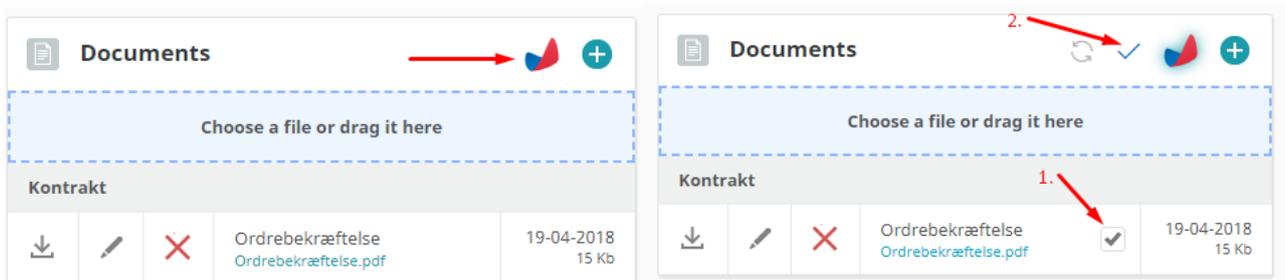


# Visma Addo – use

When you use the Visma Addo integration, wherever you have documents in webCRM, you can get them signed through Visma Addo. It is preferable to create PDF templates for offers, contracts etc. that should be signed. This can be done under Utilities -> Templates -> PDF templates (see separate guide).

## 1. Send a document for signing

Go to an entity and create/upload the document you want to get signed. Then click the Visma Addo icon in the document box and mark the document(s) you want to be signed and click the check-mark:

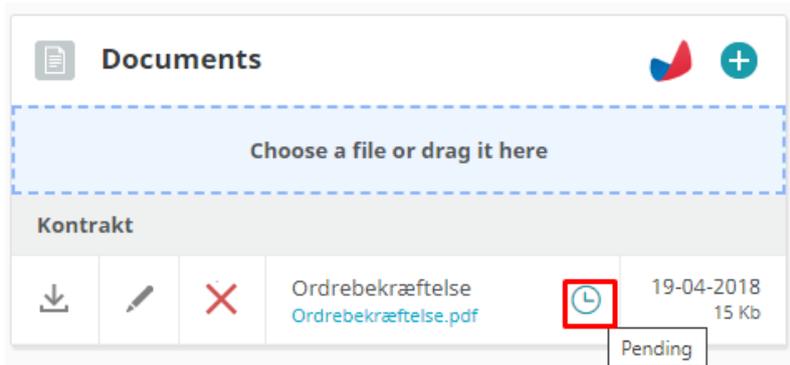


As a default, the contact person from the entity is provided as a recipient and current user as Sender.

You can add other recipients from the organisation on the drop-down arrow and search if you want, or you can add external email addresses directly in the field if necessary. This requires that you fill out the name of the external person and that name will be used to address the recipient in the send out document.

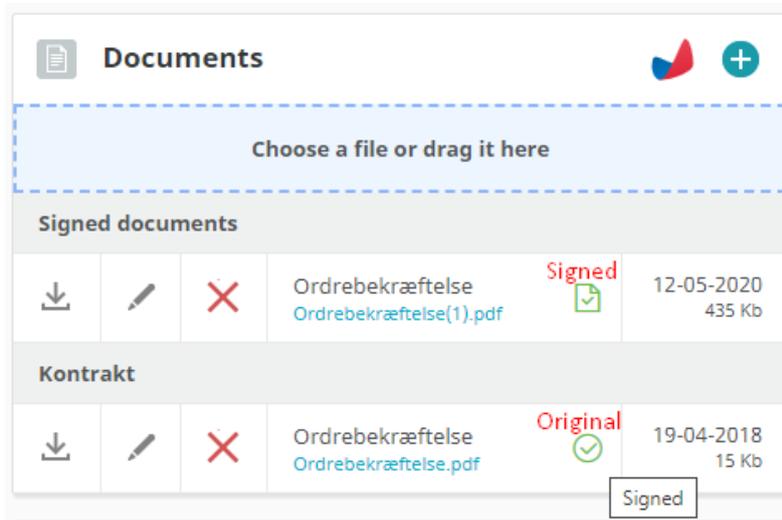
Choose signing method (default is set in the configuration) and click send.

When the document is sent, you will see an icon showing that the signature is pending:



## 2. Receiving signature in webCRM

When the document is signed by the user, webCRM is updated. The original document is marked as signed, and the Signed document is uploaded.



When you open the signed document, it has a Visma Addo identification number in the side and a signature in the end, e.g. like this: [Signed document example.pdf](#)

Specified users will also receive an email about the signing, e.g. the responsible, the sender or some specific user that should always receive it. This can be changed in the setup – please contact webCRM.

## 3. Rejections

In case the document is rejected the original template is updated with the below icon:



Specified users will also receive an email about the rejection, e.g. the responsible, the sender or some specific user that should always receive it. This can be changed in the setup – please contact webCRM.

#### 4. Recipients view

The recipient(s) will receive an email with a template from Visma Addo (chosen under Configuration of the Visma Addo integration). E.g.

Dokument afventer din underskrift


**Lasse Emil Lind Andersen** <no-reply@vismaaddo.net>  
 To  Christine Kayser

 Reply  
  Reply All  
  Forward  
  ...

ti 12-05-2020 14:13

 If there are problems with how this message is displayed, click here to view it in a web browser.

Kære Christine Test

Lasse Emil Lind Andersen har sendt et dokument som afventer din underskrift. Du kan underskrive dokumentet via følgende link: [Åbn dokument](#).

Med venlig hilsen,  
Lasse Emil Lind Andersen  
webCRM

**ÅBN DOKUMENT**

**AFSENDER**

12 maj 2020

**Lasse Emil Lind Andersen**  
webCRM  
**DOKUMENT**  
Ordrebekræftelse.pdf  
**TRANSAKTION-ID**  
777282

**UNDERSKRIVER**

Christine Test (dig) **DOKUMENTER**

**TRANSAKTIONEN UDLØBER**

26 maj 2020

When the user clicks sign, they get to a page where the document can be viewed and signed:

## Du har modtaget 1 dokument

Læs og underskriv dokumentet.  
Klik derefter 'Send' nederst på siden.



Ordrebekræftelse.pdf  
Læs og underskriv



From here, the document can be opened and read:

Kunde 1  
Eksempelvej 1  
2100 København Ø  
Danmark  
Att.: Peter Eksempel



Afsender Firma A/S  
Adresse 1  
DK-2830 Virum  
Danmark

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### Ordrebekræftelse

Vedr.: Ordre nr.: 0001

Hermed bekræftes aftalen om køb af produkt 1 og implementering.

Ordren indeholder:

Varenummer	Varenavn	Beskrivelse	Listepris	Pris	Mængde	%	Total
1010	Produkt 1	Dette kunne være et af jeres produkter.	10.000,00	10.000,00	1,00	0,00	10.000,00
1100	Fast ydelse 1	Dette kunne være en fast ydelse i sælger, fx en startpakke til et produkt.	15.000,00	15.000,00	1,00	10,00	13.500,00
<b>Total</b>							<b>23.500,00</b>

Samlet pris: 23.500 DKK

Der fremsendes en separat faktura, der bedes betalt indenfor .

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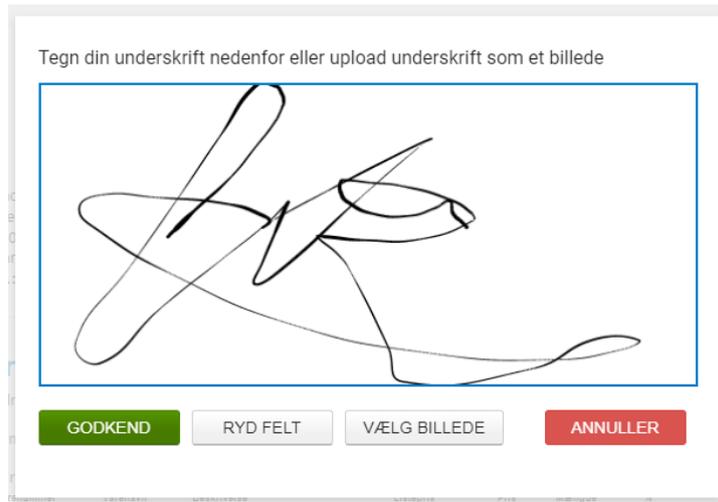
Med venlig hilsen,  
Jørgen Rode

Telefon:

**UNDERSKRIV DOKUMENT**

AFVIS DOKUMENT

When you click Sign, a box spear with the chosen signing method:



After that, the user can click Send, or wait if more documents are awaiting to be signed:



After signing, the customer receives a confirmation email, e.g.

