Cleverbase & docusign

PART 1 OF 3 · SEND

Send a document for signature.

This is how you send a document that needs to be signed with Cleverbase QES. You work in Docusign as usual; only the signature type is different.

WHO	WHEN	YOU NEED
Sender	For every document	Cleverbase QES is enabled (leaflet 1)

1. Click **Start** and choose **Envelopes**.
2. Choose **Send an Envelope** or **Sign a Document**.
3. Upload the document.
4. Add each recipient: **name**, **email address** and whether this person needs to **sign**.
5. Under **Select signature type**, choose **Cleverbase QES**.
6. Enter the subject line and the text of your message.
7. Select the category the document is intended for.
8. You now see the document. Add a visual signature or other fields if needed, as you normally would.
9. Click **Send**.

✓ **Done.** The signers receive an email with a link to the document.

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PART 2 OF 3 · SIGN

Sign a document with Cleverbase.

You have received an email from Docusign with a document to sign. You sign on your computer and confirm with the Cleverbase app on your phone.

WHO	WHEN	YOU NEED
Signer	For every document	The Cleverbase app on your phone

ON YOUR COMPUTER

1. Open the email and click the link.
2. You see **Review and continue**. Click **Continue**.
3. Read the document carefully. Do you agree? Click **Sign**, then **Finish**.
4. You are taken to Cleverbase. Click **Next**.

ON YOUR PHONE, IN THE CLEVERBASE APP

5. Scan the QR code on your screen with the Cleverbase app.
6. Log in, tap **Sign** and enter your PIN.

✓ **Done.** The document now has a qualified electronic signature (QES). You can download it.

Cleverbase & docusign

PART 3 OF 3 · VERIFY

Verify the signature.

Want to be sure a document was signed with QES, and by whom? Check it in seconds with the Cleverbase Validator.

WHO	WHEN	YOU NEED
Anyone with the signed document	After signing, whenever you like	The signed document

1. Go to the Cleverbase Validator: **https://cleverbase.com/en/validator/**
2. Upload the signed document.
3. Check at the bottom of the page whether the document is signed, and by whom.

✓ **Done.** You see whether the signature is valid and who signed the document.