

Circularo User Guides

Admin Guide

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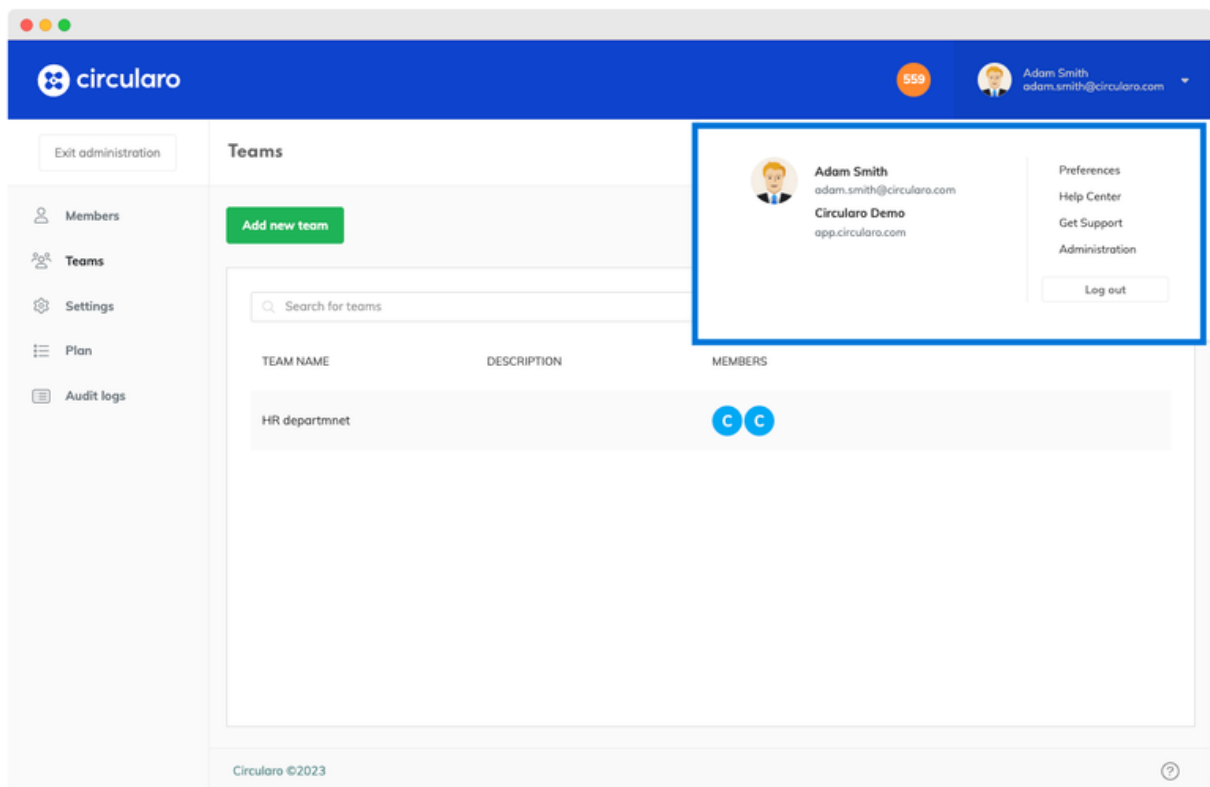
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Introduction

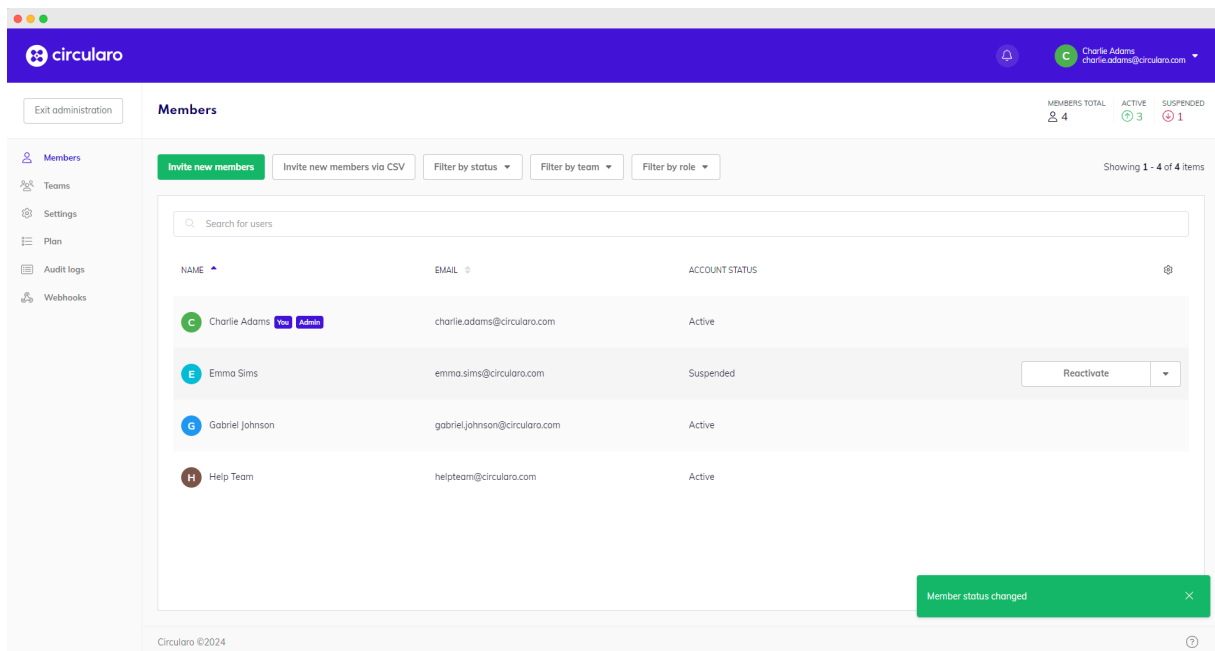
If you are the Administrator of your organization in Circularo, you can access the simple and comprehensive user administration section under **Administration**.

Here you can invite, manage, and delete members of your organization, adjust default settings for new members, and allow or ban certain features as per your company policy. You can also appoint other members to become Admins.



Members

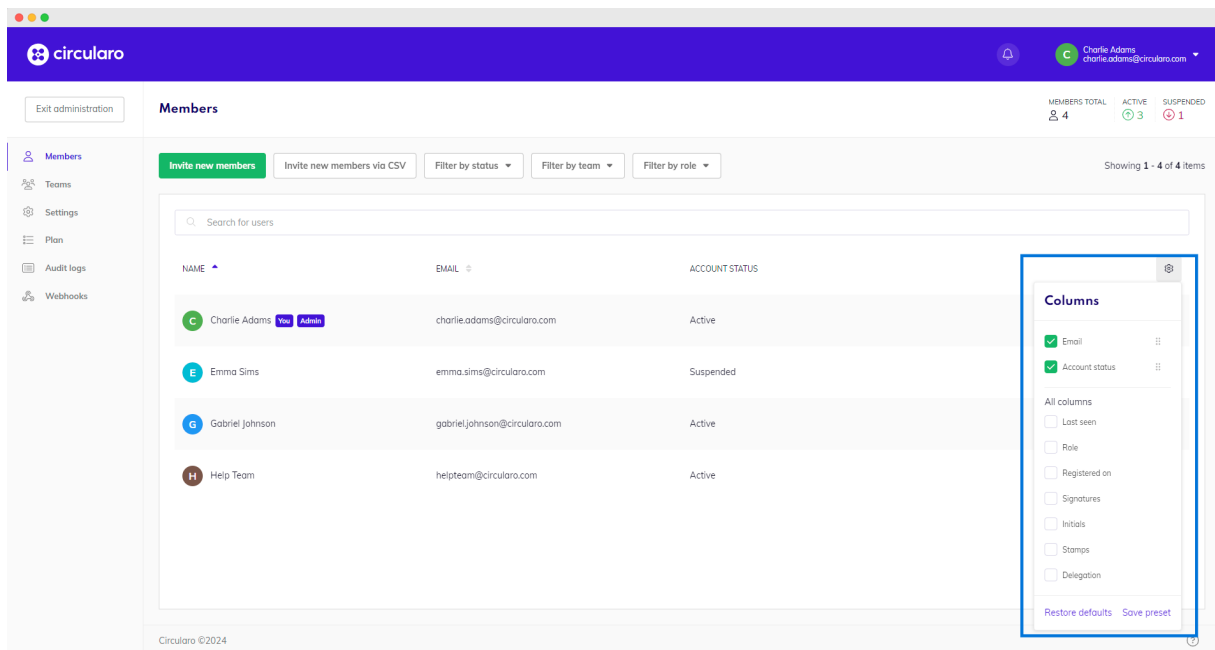
Here you can see the complete list of members in your organization and the account status of each member.



The screenshot shows the Circularo Members page. At the top, there's a navigation bar with the Circularo logo and a user profile for Charlie Adams. Below the navigation bar, there's a sidebar with links to Members, Teams, Settings, Plan, Audit logs, and Webhooks. The main content area is titled "Members" and includes a search bar, filters for status, team, and role, and a table of members. The table has columns for Name, Email, and Account Status. A settings icon is visible in the top right of the table header. A green notification bar at the bottom right says "Member status changed".

NAME	EMAIL	ACCOUNT STATUS
Charlie Adams	charlie.adams@circularo.com	Active
Emma Sims	emma.sims@circularo.com	Suspended
Gabriel Johnson	gabriel.johnson@circularo.com	Active
Help Team	helpteam@circularo.com	Active

There are different details you might wish to have visible regarding the members of your organization. Each detail has its own column. In the top right corner in the line of column names is a **settings** button for the columns. When you click it, all the available columns will be shown.



The screenshot shows the Circularo Members page with the Columns settings panel open. The panel lists the columns that can be displayed in the table, with checkboxes to select or deselect them. The columns are: Email, Account status, All columns, Last seen, Role, Registered on, Signatures, Initials, Stamps, and Delegation. The Email and Account status columns are checked. The panel also includes "Restore defaults" and "Save preset" buttons.

NAME	EMAIL	ACCOUNT STATUS
Charlie Adams	charlie.adams@circularo.com	Active
Emma Sims	emma.sims@circularo.com	Suspended
Gabriel Johnson	gabriel.johnson@circularo.com	Active
Help Team	helpteam@circularo.com	Active

To make a column visible in the table, simply check the square. You can also change the position of the columns by dragging them up or down in the list.

There are two columns that are always visible in the table - **Name** and the **action dropdown menu**.

To change the width of the columns, hover your mouse near the name of the column and then drag the divider to the side.

The available columns are:

- **Email** - user's email
- **Account status** - the member's current status
- **Last seen** - shows the time the user last logged into their account
- **Role** - the member's current role
- **Registered on** - the exact date the account was registered
- **Signature** - Yes/No based on whether user has a signature saved to their account
- **Initials** - Yes/No based on whether user has initials saved to their account
- **Stamps** - Yes/No based on whether user has a stamp set up for their account
- **Delegation** - shows to whom the user is delegating their documents and the exact date and time period during which the delegation is active

Account status

Account status indicates what each member can and cannot do in Circularo. You can filter your organization's members by status.

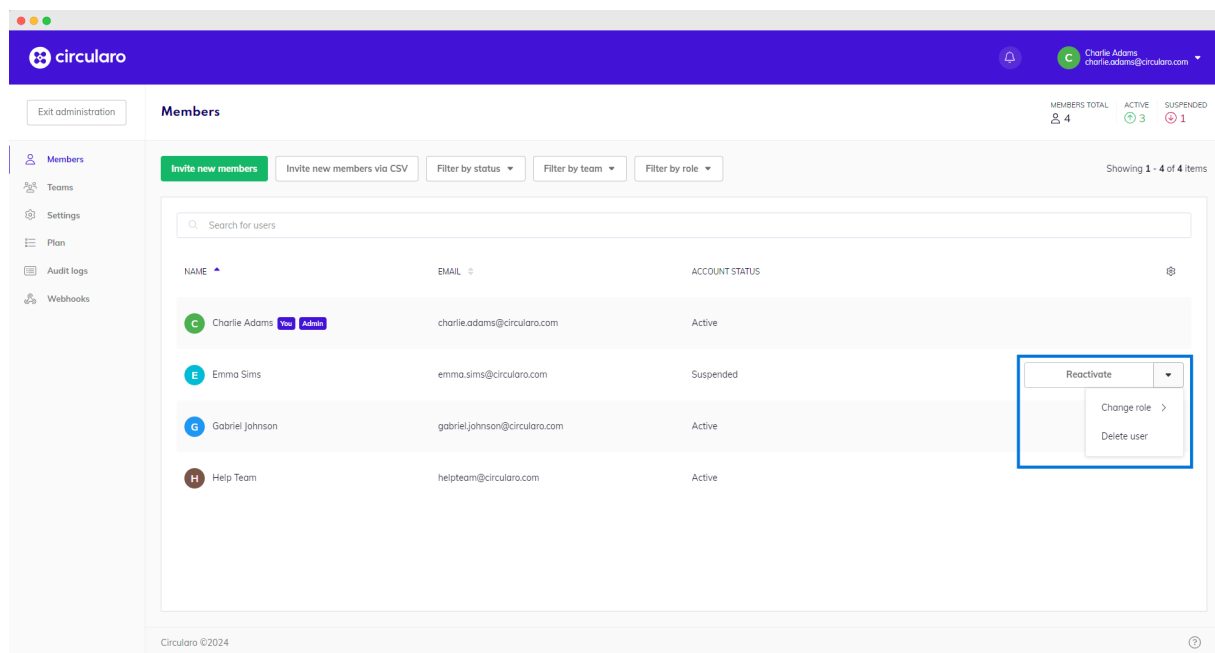
Member's account status can be:

- **Active** - Can log into Circularo and use it. License fees apply.
- **Suspended** - Cannot log into Circularo. License fees apply.
- **Invited** - Has received an invitation but has yet to activate their account. License fees don't apply until activation.

Deleted members are removed from the list and Circularo overall completely and license fees don't apply to them.

Available actions

To manage the members of your organization, hover your cursor over a member's name and an action button with a dropdown will appear, showing you the available actions.



Suspend

Suspended members cannot log into the Circularo app and can be reactivated at any time. Suspended members also count towards the user limit specified in your subscription plan, if you have one - fees still apply.

If you want to delete a member permanently, use the Delete user option instead.

Reactivate

This is the option to reactivate the account of a previously suspended member.

When set to Active, they will be able to log into their app again and access all their documents and other data stored there.

Change role

Admin

This will give the selected member Admin rights.

It will not affect your own Admin rights - there can be an unlimited number of Admins in one organization and they all have the same rights and authority.

Please note that other Admins also have the right to demote you to a Member. Choose Admins carefully.

Member

Regular organization members have full access to all the features and functionalities available in the app (based on the subscription plan) but cannot manage organizations, teams, or other members.

Member Lite

Member Lite is an organization member who is only able to perform one basic task and doesn't have any access to the rest of the Circularo app functionalities.

Any organization member or Admin can be turned into a Lite member but typically, this type of role is used in user-based subscription plans, as the Lite user licence is significantly cheaper.

There are currently three types of Lite members.

Prepare Only

Member can only upload and prepare documents for other people to sign, as well as create templates.

Sign Only

Member can sign documents sent to them but cannot initiate signing processes.

Read Only

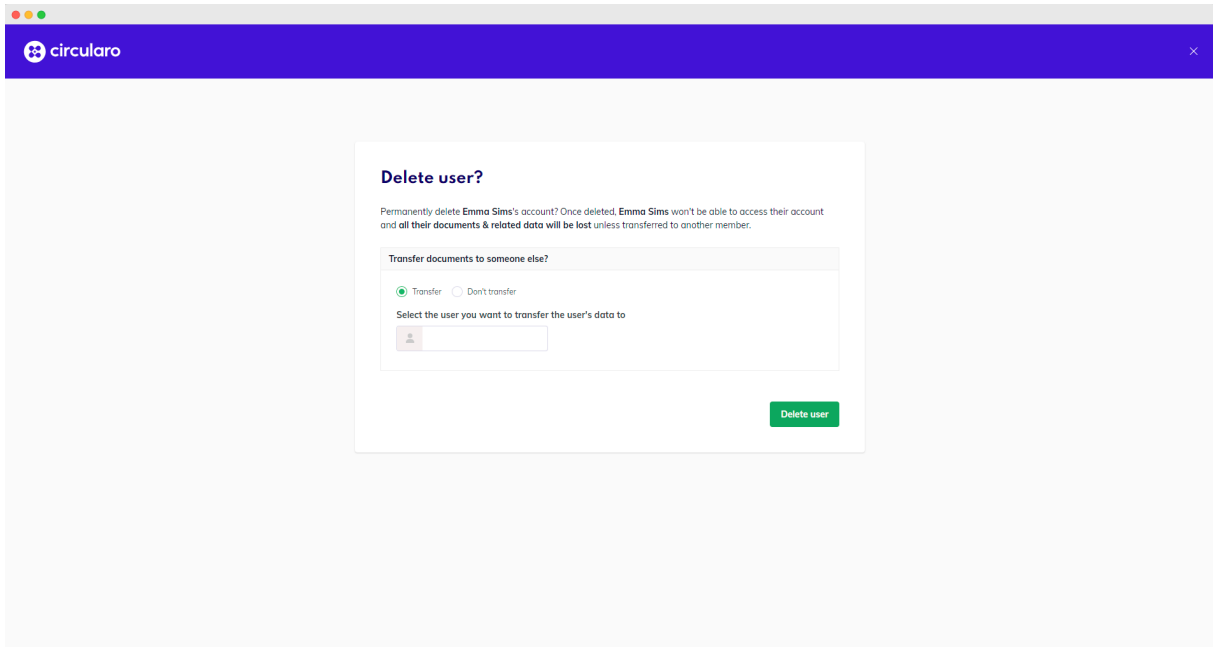
Member can only view documents shared with them and cannot interact with those documents in any other way.

Delete user

Select this option if you want to permanently delete someone from your organization. Unlike Suspended members, deleted members' accounts will be removed permanently from Circularo along with all their data and they cannot be restored.

When deleting a user, you will be given the option to transfer their documents and signing responsibilities to another member of your choice so that progress isn't lost with the deleted account.

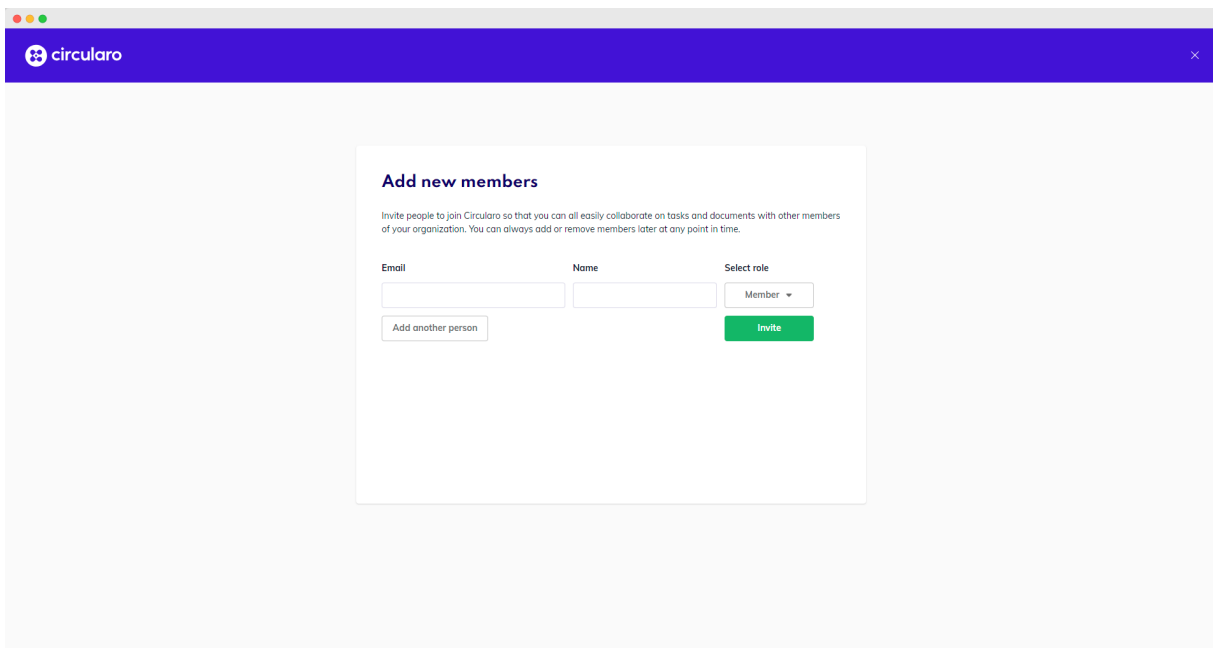
If you choose not to transfer documents, **all documents created by the deleted user will also be deleted**. This is irreversible and there is currently no way to restore the deleted documents.



The screenshot shows a web browser window with the Circularo logo in the top left corner. The main content area displays a modal dialog titled "Delete user?". Below the title, a warning message states: "Permanently delete Emma Sims's account? Once deleted, Emma Sims won't be able to access their account and all their documents & related data will be lost unless transferred to another member." Below this message is a section titled "Transfer documents to someone else?". It contains two radio buttons: "Transfer" (which is selected) and "Don't transfer". Below the radio buttons is a text input field with a placeholder "Select the user you want to transfer the user's data to" and a small user icon to its left. At the bottom right of the dialog is a green button labeled "Delete user".

Invite new members

Click the green Invite new members button if you want to add more members to your organization.



The screenshot shows a web browser window with the Circularo logo in the top left corner. The main content area displays a modal dialog titled "Add new members". Below the title, a message states: "Invite people to join Circularo so that you can all easily collaborate on tasks and documents with other members of your organization. You can always add or remove members later at any point in time." Below this message are three input fields: "Email", "Name", and "Select role". The "Email" and "Name" fields are text inputs, and the "Select role" field is a dropdown menu with "Member" selected. Below the "Email" field is a button labeled "Add another person". To the right of the "Name" and "Select role" fields is a green button labeled "Invite".

Here you can send email invitations to potential members to join your organization and start using Circularo. All you need to do is fill out their email address, name, and assign a role (Member or Admin).

Potential members who have not yet accepted your invitation to set up a Circularo account will show up in your list of members with an *Invited* status.

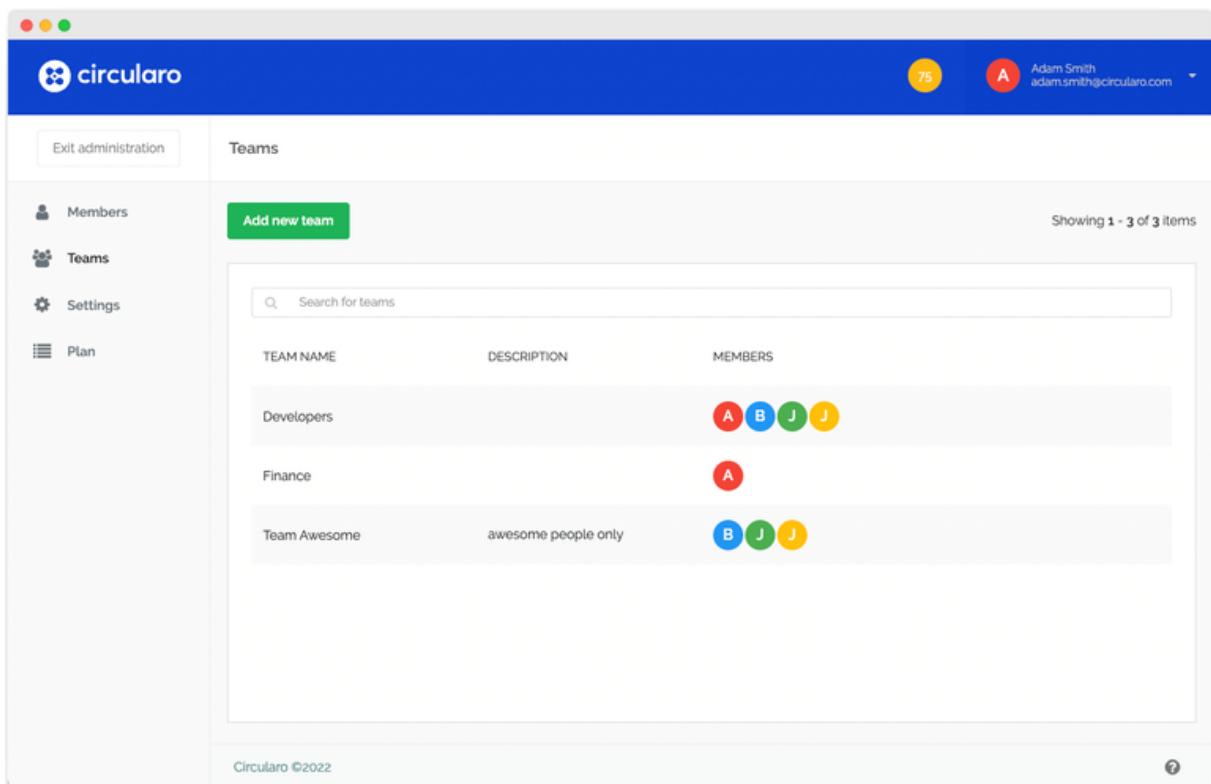
Invite new members via csv

If you want to invite people into your organization in bulk, you can do so by uploading a CSV file with contacts. The minimum required details for each new member are Name and Email address.

Teams

Availability: Circularo Business and Enterprise

Teams exist in Circularo to simplify and speed up sharing and collaboration. Documents, folders, templates, and contacts can all be shared to entire teams instead of members individually. In this section, you as the Admin, can create and manage teams and assign members to them.

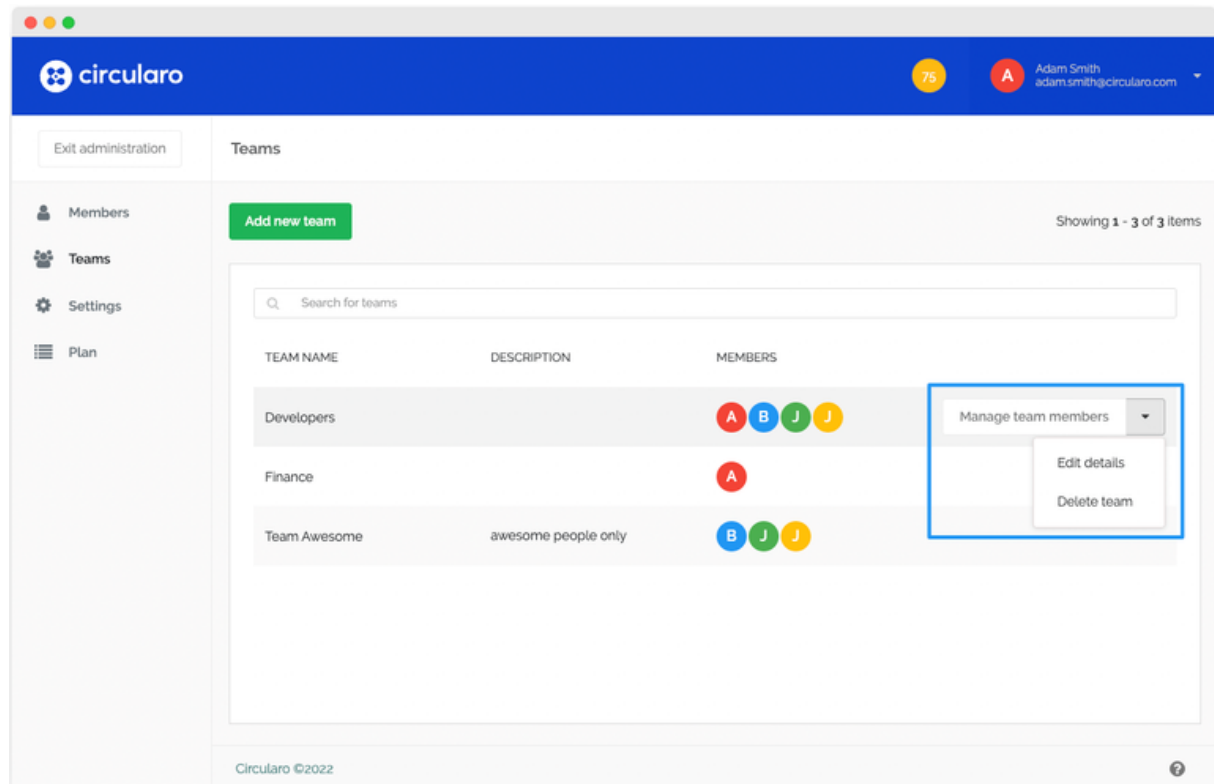


The screenshot shows the Circularo Teams administration interface. The top navigation bar is blue with the Circularo logo, a 75% progress indicator, and the user profile of Adam Smith. The left sidebar contains links for Members, Teams, Settings, and Plan. The main content area is titled 'Teams' and includes a green 'Add new team' button. Below this is a table listing existing teams. The table has columns for Team Name, Description, and Members. The teams listed are Developers, Finance, and Team Awesome. The Developers team has four members (A, B, J, J), the Finance team has one member (A), and the Team Awesome team has three members (B, J, J). The footer of the interface shows 'Circularo ©2022' and a help icon.

TEAM NAME	DESCRIPTION	MEMBERS
Developers		A, B, J, J
Finance		A
Team Awesome	awesome people only	B, J, J

Available actions

The menu with actions available for each team will display after hovering your mouse over the team's name.



Manage team members

This enables you to add or remove members from the selected team.

Each user can be a member of multiple different teams.

By removing a member from a team, you are also removing this members' access to any files or items shared with the team.

Removing a member from a team **does not result in deleting them as a user**. If you want to delete a user's account completely, you can do so in the [Members](#) section.

Edit details

Change the team's name and/or description.

Delete team

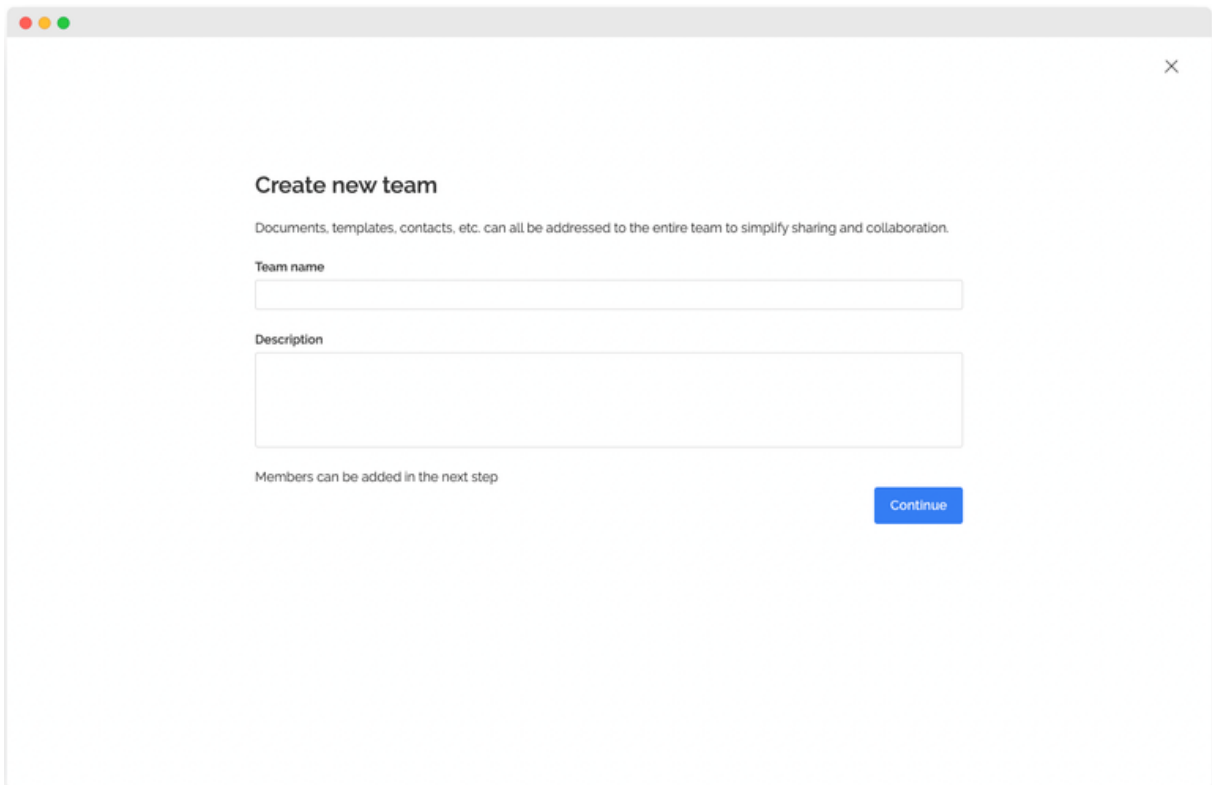
Removes the entire team.

If you delete a team, any files previously shared with this team won't be accessible to the individual members of the team anymore.

Add new team

To create a new team, click on the green **Add new team** button on the top of the page.

You will be asked to choose a name for the team and write a description (optional). After pressing **Continue**, you will be able to select members.

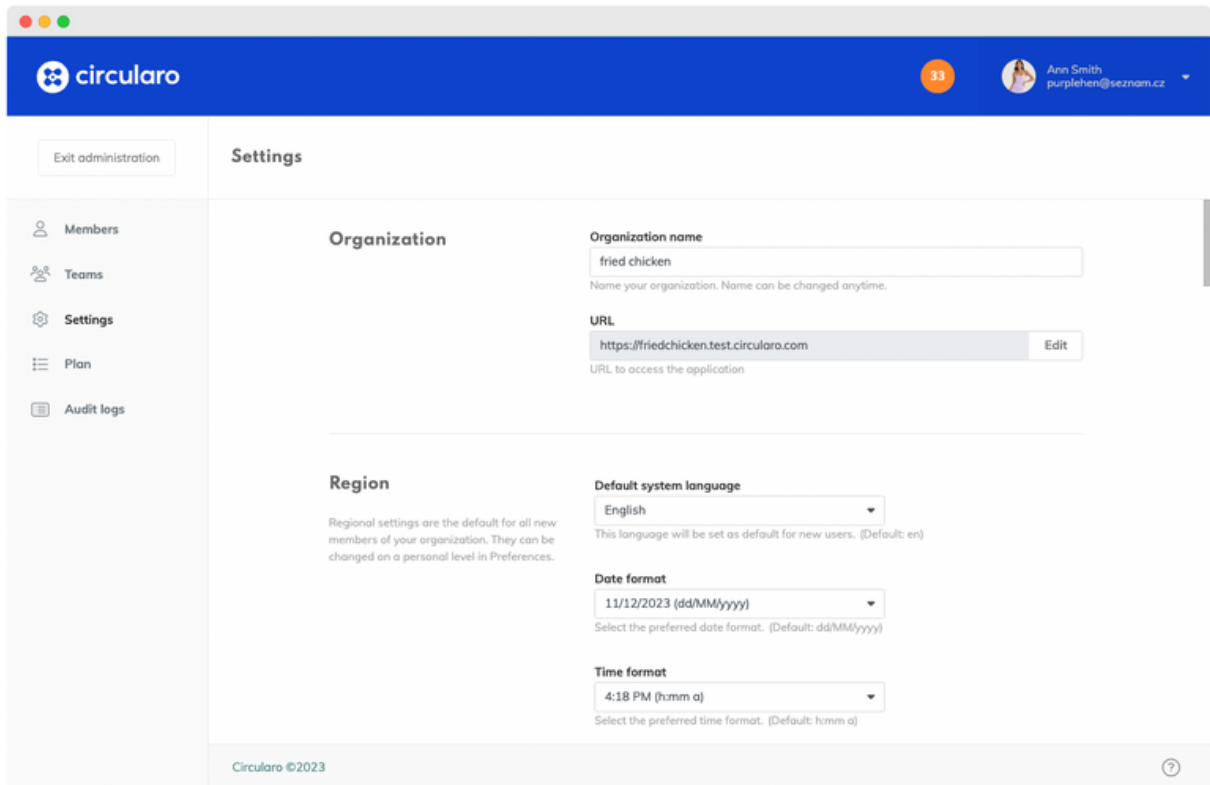
A screenshot of a web browser window showing a 'Create new team' dialog box. The dialog box has a title bar with three colored dots (red, yellow, green) and a close button (X) in the top right corner. The main content area is white and contains the following elements: a title 'Create new team' in bold; a subtitle 'Documents, templates, contacts, etc. can all be addressed to the entire team to simplify sharing and collaboration.'; a label 'Team name' above a single-line text input field; a label 'Description' above a multi-line text input field; a note 'Members can be added in the next step' at the bottom left; and a blue 'Continue' button at the bottom right.

Members can be added or removed from teams in any point in time.

There are currently **no notifications sent** when a member is added to a team, removed from a team, or when a team they are a part of is deleted.

Organization Settings

This section in Administration contains settings that apply throughout the entire organization. That includes default app settings for new members, as well as allowing or banning certain features, among other things.



The screenshot shows the Circularo Administration interface. The top navigation bar is blue with the Circularo logo on the left and a user profile (Ann Smith, purplehen@seznam.cz) on the right. Below the navigation bar, there's a sidebar with links to Members, Teams, Settings (highlighted), Plan, and Audit logs. The main content area is titled 'Settings' and contains two sections: 'Organization' and 'Region'. The 'Organization' section has a text input for 'Organization name' (filled with 'fried chicken') and a text input for 'URL' (filled with 'https://friedchicken.test.circularo.com'). The 'Region' section has three dropdown menus for 'Default system language' (English), 'Date format' (11/12/2023 (dd/MM/yyyy)), and 'Time format' (4:18 PM (h:mm a)).

Organization

Organization name

Select a name for your organization. This can be the official name of your company or institution, or something completely unofficial. Name can be changed anytime.

URL

The URL to access your Circularo app. To change it, click on the Edit button and create your new custom URL.

Before changing your organization's custom URL, you should keep in mind that

- All previously shared document links will stop working
- Public links will not redirect and embedded links will stop working
- You will need to resend pending invitations
- You will need to update services that use your URL (like SSO)
- Your old URL will eventually become available for others to claim

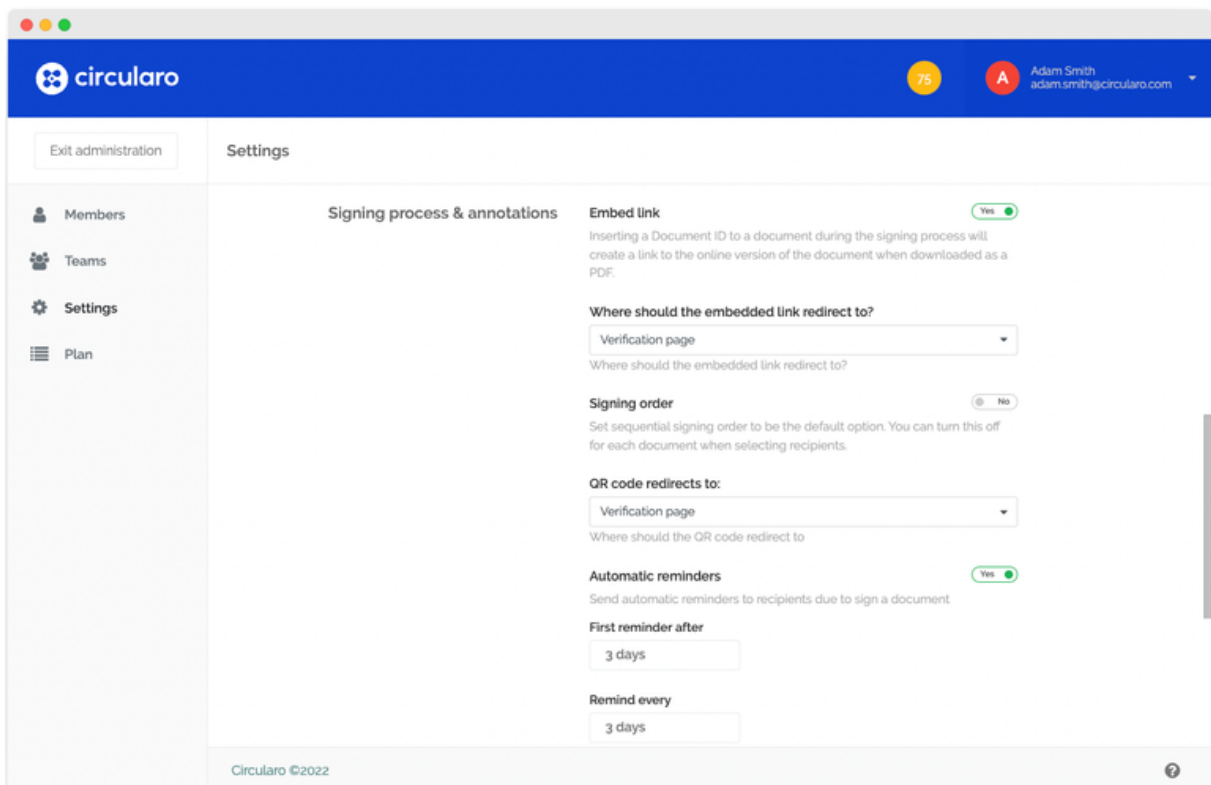
If you don't see the Edit URL button in your app, please contact our sales team to talk about your options.

Region

These are regional settings applied to all new members of your organization. Each member can then change them to their liking in their [Preferences](#).

Default system language affects the way users see their Circularo app.

Timezone, Date format, and Time format only affect the defaults used when signing documents and what is displayed in the [Audit trail](#).



The screenshot shows the Circularo web application interface. At the top is a blue header with the Circularo logo on the left and user information (75, A, Adam Smith, adam.smith@circularo.com) on the right. Below the header is a sidebar with navigation links: Exit administration, Settings, Members, Teams, Settings, and Plan. The main content area is titled 'Settings' and contains a section for 'Signing process & annotations'. This section includes several settings: 'Embed link' (Yes), 'Where should the embedded link redirect to?' (Verification page), 'Signing order' (No), 'QR code redirects to:' (Verification page), 'Automatic reminders' (Yes), 'First reminder after' (3 days), and 'Remind every' (3 days). The footer of the page shows 'Circularo ©2022' and a help icon.

Signing process & annotations

Here you will find organization-wide settings related to signing documents and annotations.

Most of these settings can be adjusted or overwritten during the signing process itself, they just indicate the default setting.

Embed link

In the [Select signature fields](#) step in the signing process, there is an option to insert a Document ID. This ID will turn into a link when the document is downloaded as a PDF if this toggle is on.

Where should the embedded link redirect to?

Here you can choose whether the aforementioned link leads to the preview of the document online, document detail, or to the document verification page to verify its authenticity.

Signing order

Signing order determines in which order will each recipient receive the document they are supposed to sign.

On - By default, recipients will receive the document in predetermined order. After one recipient signs, the document goes to the recipient/s next in order (Sequential signing order)

Off - By default, all recipients receive the document at the same time (Parallel signing order)

Changeable signing order

This allows you to enforce the default Signing order setting you chose above.

On - This Signing order setting can be adjusted individually for each document in the [recipient selection step](#).

Off - Users won't be able to change the Signing order, making the default you select above an unchangeable standard throughout your entire organization.

While enforcing a parallel or sequential signing order can reduce chaos and human errors, different types of documents may require different processes, including the signing order.

QR code redirects to

QR code can be added directly to documents during [signature field selection](#) or can be found in the [Audit trail](#). In this setting, you choose where does it lead to when scanned.

Similar to the embedded link, the QR code can direct to either the document preview or the verification page.

Automatic reminders

Here you can schedule reminders to be automatically sent to anyone who has pending documents waiting for them to sign.

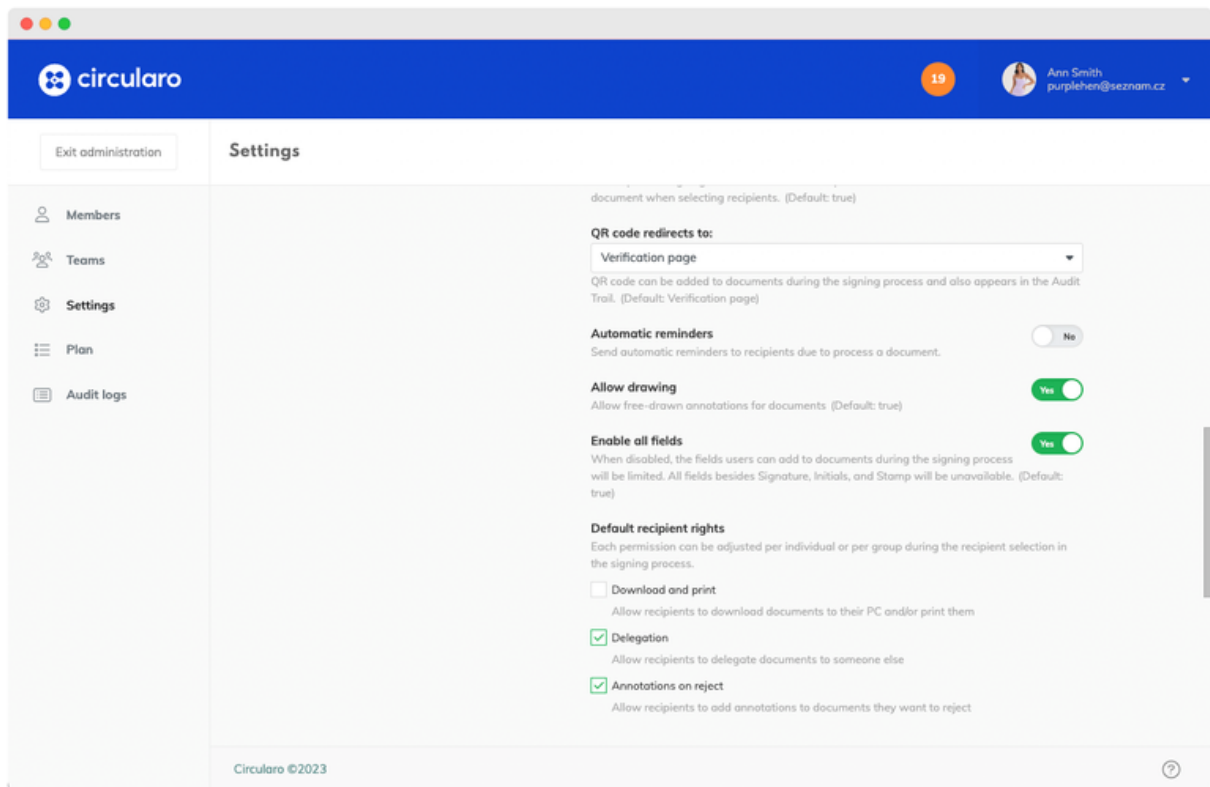
On - Automatic reminders are always sent to members of your organization.

You will be asked to pick the day of the first reminder as well as the interval between two reminders.

Off - Reminders are not being sent automatically by default. They can be turned on in the [Review and send](#) step of the signing process individually for each document.

Allow drawing

Enable free-drawn annotations in document preview and during signing.



Enable all fields

When disabled, the fields users can add to documents during the signing process will be limited. All fields besides [Signature fields](#) will become unavailable.

Default recipient rights

As an admin, you can set the default rights and permissions for all document recipients throughout the organization.

Please note that these are only default settings that can be overwritten by individual senders for each recipient or group of recipients during the signing process.

There is currently no way to disable these options completely.

Download and print - when disabled, recipients won't be able to download documents sent to them to their own PC or print them

Annotations on reject - when disabled, recipients who reject a document won't be able to add annotations to it

Delegation - when disabled, recipients won't be able to [delegate](#) the document sent to them to someone else to process it on their behalf

Detect signature fields

When converting a MS Office document to PDF, any potential pre-prepared signature fields the document may contain will be automatically detected.

Default deadline

Turn the toggle on to select a default processing deadline for all documents in the organization.

Choose from 1 day to 6 months from the start of each signing process, or select a custom date by which all processes must be completed.

Deadline changeable

Here you can enforce the default deadline setting above.

On - Users will be able select a custom deadline during each individual signing process. The deadline selected above will remain a default option and will apply if the sender doesn't change it manually.

Off - The processing deadline selected above will apply universally for all document processes and individual users won't be able to change it.

All recipients in a group have to sign

Select the default setting for [group signing](#).

Recipients can repeat in the signing process

Allows for one recipient to be entered into a workflow multiple times. Applies to workflows with enabled signing order only.

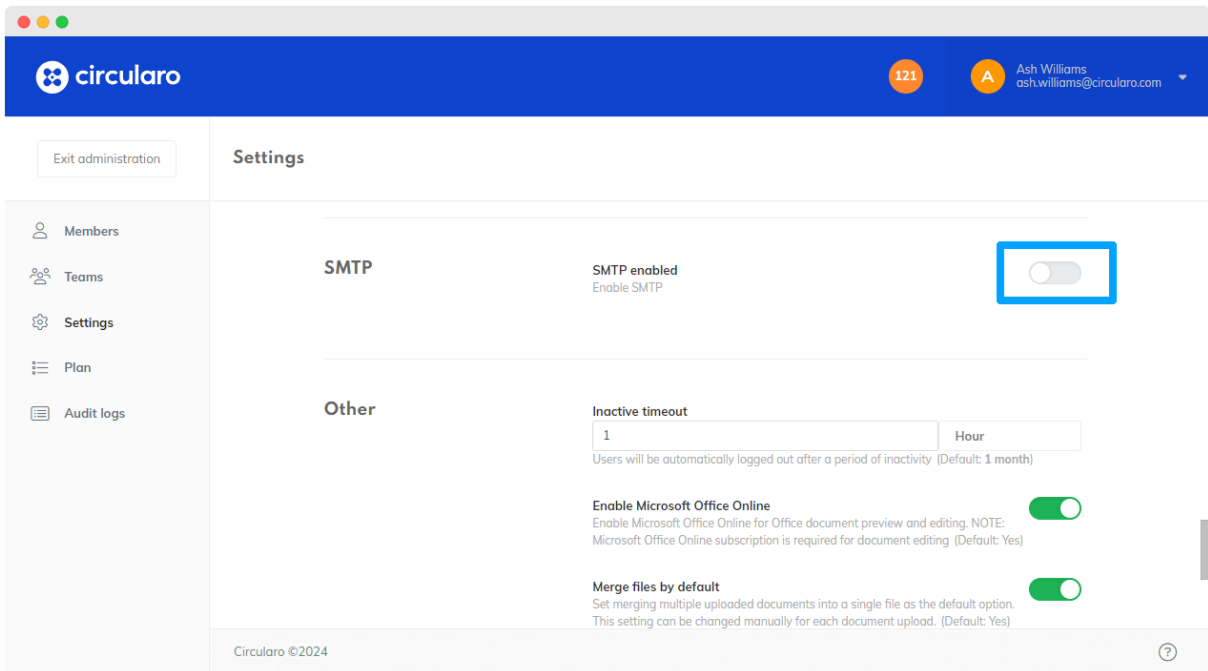
Allowed types of signatures

Select which [types of signatures](#) will be allowed throughout your organization.

SMTP

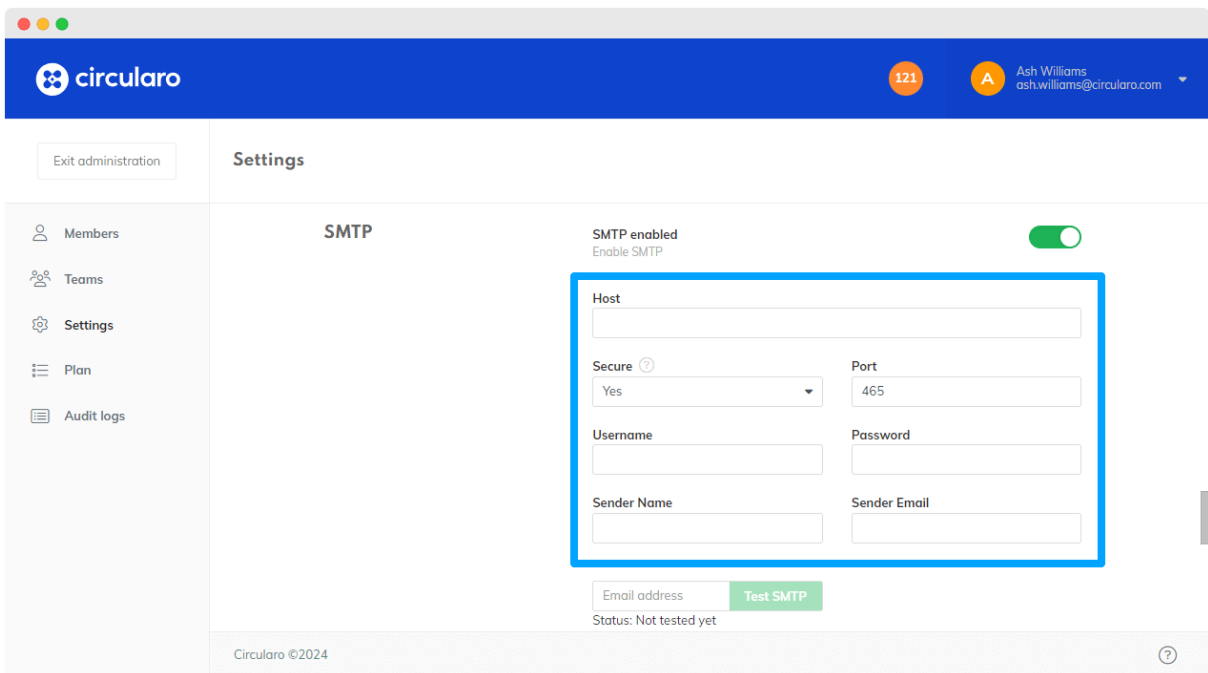
How to set up your custom SMTP:

1. Switch the **SMTP Enabled** toggle on



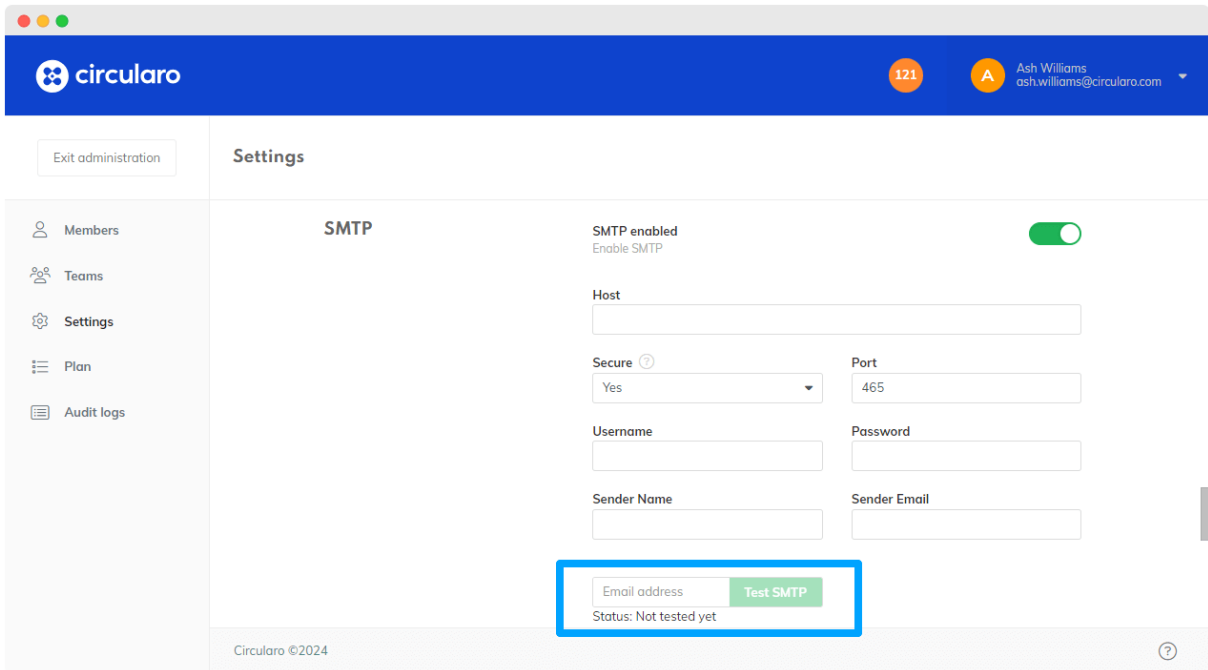
The screenshot shows the Circularo administration interface. The top navigation bar is blue with the Circularo logo on the left and user information (121, A, Ash Williams, ash.williams@circularo.com) on the right. A left sidebar contains links for Members, Teams, Settings (highlighted), Plan, and Audit logs. The main content area is titled 'Settings' and is divided into two sections: 'SMTP' and 'Other'. In the 'SMTP' section, the 'SMTP enabled' toggle switch is currently off and is highlighted with a blue rectangular box. Below this, the 'Other' section contains settings for 'Inactive timeout' (set to 1 hour), 'Enable Microsoft Office Online' (toggle on), and 'Merge files by default' (toggle on). The footer of the settings page shows 'Circularo ©2024' and a help icon.

2. Fill in the required information



This screenshot shows the same Circularo administration interface, but the 'SMTP enabled' toggle is now turned on. The configuration form for SMTP is highlighted with a blue rectangular box. The form includes the following fields: 'Host' (text input), 'Secure' (dropdown menu set to 'Yes'), 'Port' (text input set to '465'), 'Username' (text input), 'Password' (text input), 'Sender Name' (text input), and 'Sender Email' (text input). Below the form, there is a 'Test SMTP' button and a status message that reads 'Status: Not tested yet'. The footer of the settings page remains 'Circularo ©2024' with a help icon.

3. If you want to test the configuration, enter your email address and click **Test SMTP**



The screenshot shows the Circularo administration interface. The top navigation bar is blue with the Circularo logo on the left and user information (121, A, Ash Williams, ash.williams@circularo.com) on the right. Below the navigation bar, there's a sidebar with links: Members, Teams, Settings (highlighted), Plan, and Audit logs. The main content area is titled 'Settings' and contains the 'SMTP' configuration section. This section includes a toggle for 'SMTP enabled' (currently on), a text input for 'Host', a dropdown for 'Secure' (set to 'Yes'), a text input for 'Port' (set to '465'), text inputs for 'Username' and 'Password', and text inputs for 'Sender Name' and 'Sender Email'. At the bottom of the SMTP section, there's a blue-bordered box containing an 'Email address' input field and a green 'Test SMTP' button. Below the input field, it says 'Status: Not tested yet'. The footer of the page shows 'Circularo ©2024' on the left and a help icon on the right.

Other

Inactive timeout

Set the amount of time after which an inactive user will be automatically logged out of their Circularo app.

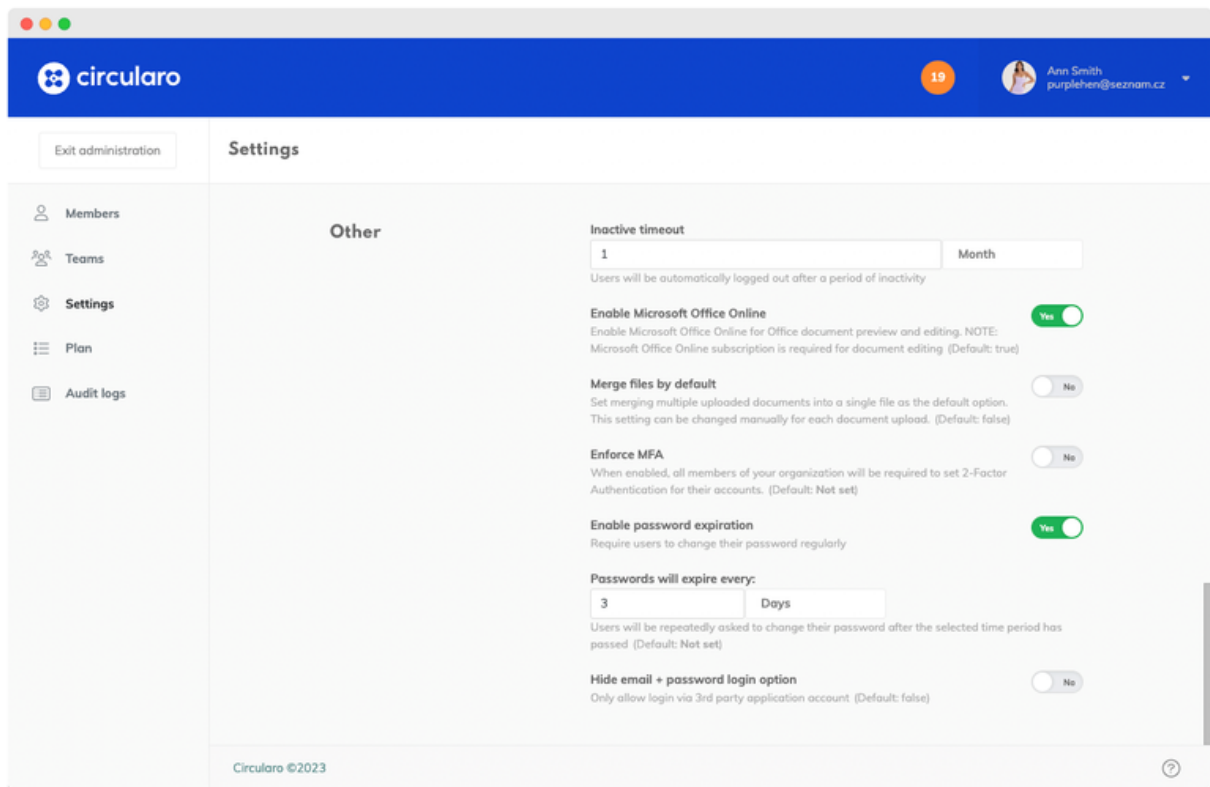
Enable MS Office Online

Allow document preview and editing in MS Office Online.

MS Office Online subscription is needed for document editing to work.

Merge files by default

Choose whether the default setting for [uploading multiple documents](#) at once is to merge them or to upload them individually. This setting can then be adjusted by each user for each upload.



Enforce MFA

When enabled, all members of your organization will be required to set [2-Factor Authentication](#) for their accounts.

Each user can select between email, phone, or 3rd party authenticator based on their personal preferences.

Enable password expiration

When enabled, all members of your organization will be required to change their password regularly. You can then set the frequency of mandatory password changes.

Hide email + password login option

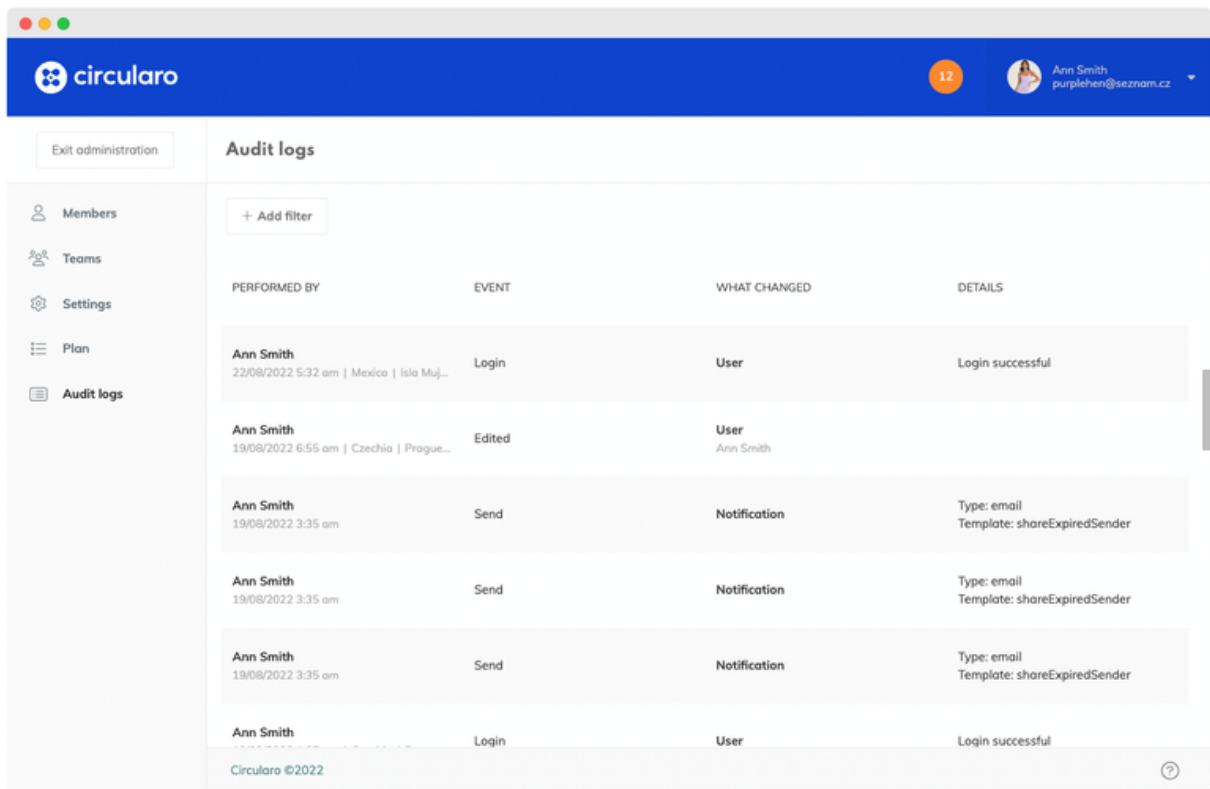
Enable to only allow members of your organization to login via 3rd party application account.

Allowed cloud providers

Select which cloud services can your organization's members connect their accounts to.

Audit logs

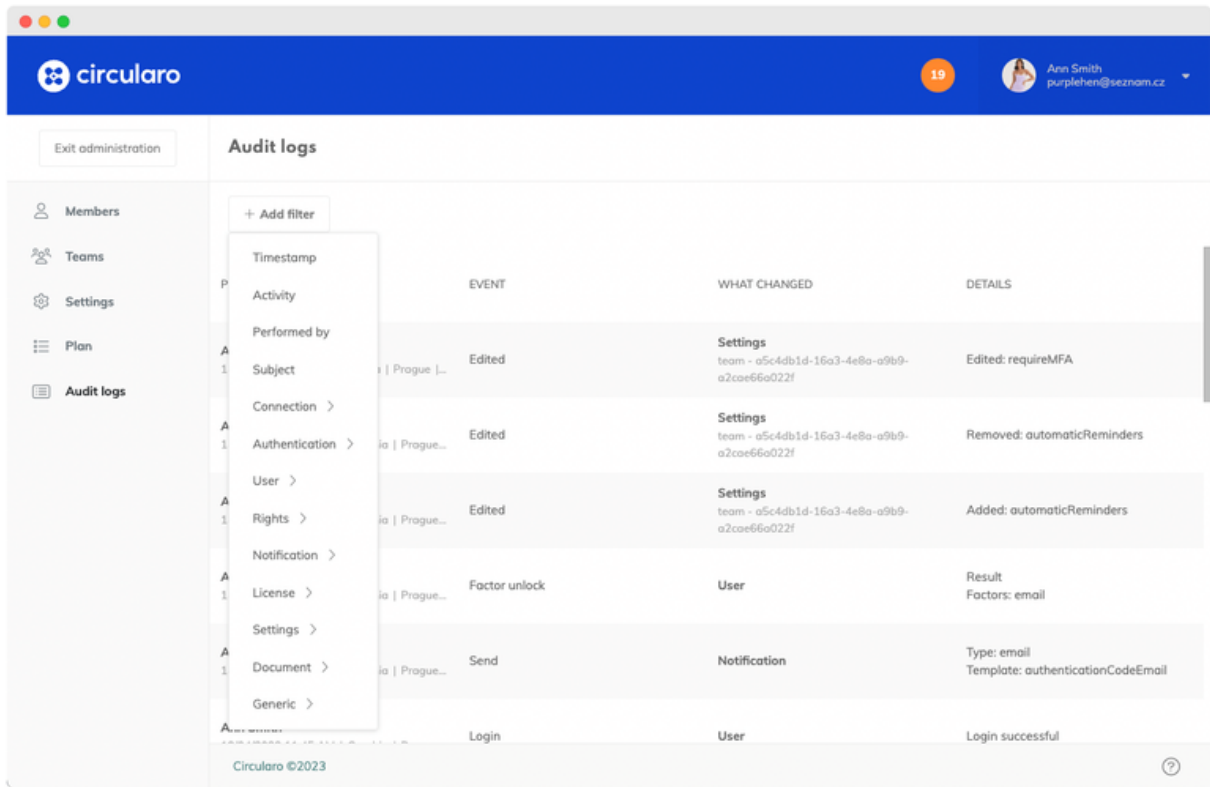
As an admin, here you can access a detailed overview of all actions and changes in the application throughout your organization.



The screenshot shows the Circularo administration interface. At the top, there's a blue header with the Circularo logo, a notification badge with '12', and a user profile for 'Ann Smith' with email 'purplehen@seznam.cz'. Below the header is a sidebar with navigation links: 'Exit administration', 'Members', 'Teams', 'Settings', 'Plan', and 'Audit logs' (which is highlighted). The main content area is titled 'Audit logs' and features a '+ Add filter' button. It contains a table with the following columns: 'PERFORMED BY', 'EVENT', 'WHAT CHANGED', and 'DETAILS'. The table lists several actions performed by 'Ann Smith', including logins, editing a user, and sending notifications. The footer of the interface shows 'Circularo ©2022' and a help icon.

PERFORMED BY	EVENT	WHAT CHANGED	DETAILS
Ann Smith 22/08/2022 5:32 am Mexico Isla Muj...	Login	User	Login successful
Ann Smith 19/08/2022 6:55 am Czechia Prague...	Edited	User Ann Smith	
Ann Smith 19/08/2022 3:35 am	Send	Notification	Type: email Template: shareExpiredSender
Ann Smith 19/08/2022 3:35 am	Send	Notification	Type: email Template: shareExpiredSender
Ann Smith 19/08/2022 3:35 am	Send	Notification	Type: email Template: shareExpiredSender
Ann Smith	Login	User	Login successful

Logs can be filtered by many different parameters.



Exit administration

Audit logs

+ Add filter

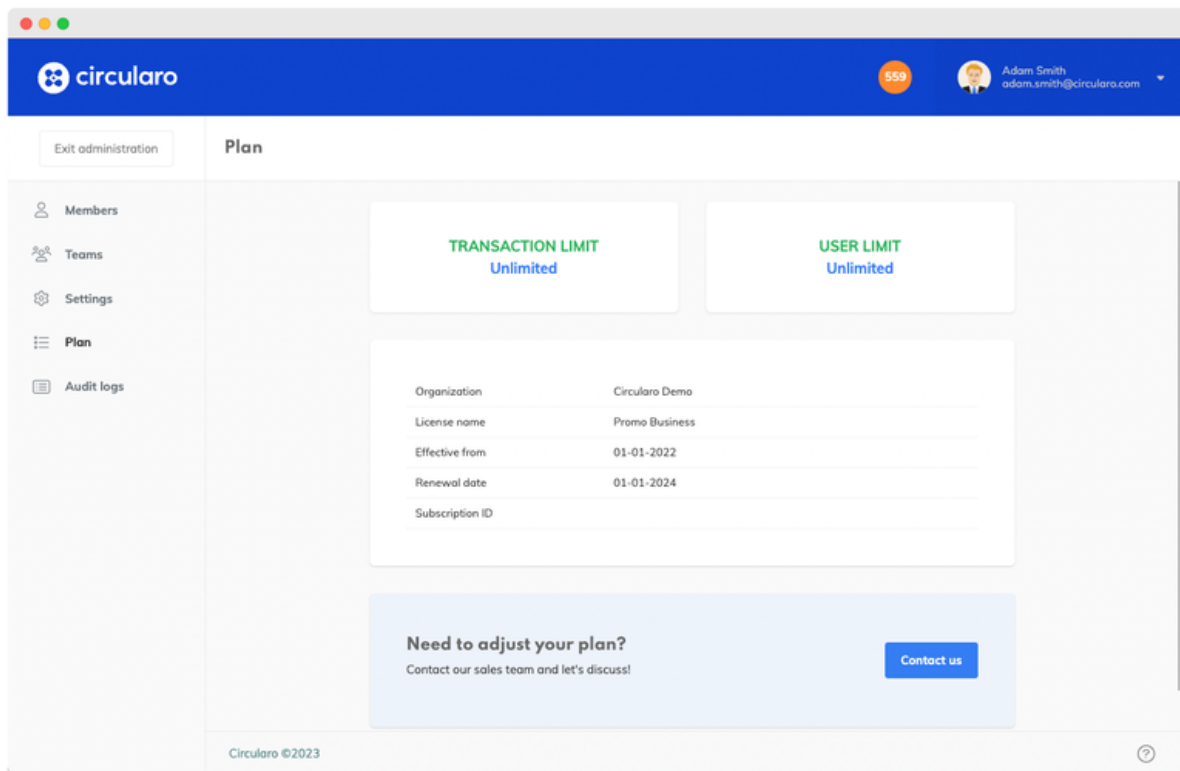
- Timestamp
- Activity
- Performed by
- Subject
- Connection >
- Authentication >
- User >
- Rights >
- Notification >
- License >
- Settings >
- Document >
- Generic >

Timestamp	Activity	Performed by	Subject	Connection	Authentication	User	Rights	Notification	License	Settings	Document	Generic
	Edited		Settings									
	Edited		Settings									
	Edited		Settings									
	Factor unlock		User									
	Send		Notification									
	Login		User									

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Plan

Here you will find all the details about your Circularo subscription plan - the name of your organization, your subscription plan, its start date and its renewal date.



Transaction limit

Here you will see the transaction limit you have agreed on (if any) and how many transactions you have left.

The explanation of what counts as a transaction in Circularo can be found [here](#).

User limit

If you have a user limit, here you will see the number of [members](#) in your organization and how many slots you have left for new members.

If you ran out of member slots, transactions, or just need to upgrade or adjust your subscription plan, feel free to [contact our sales team](#) to talk about your options.

There is also an option to contact us directly in Circularo.