Sending and Receiving Documents

Documentation · https://viaspaces.com/de/Documentation/sending-and-receiving-documents/

In this help doc: how to create a document, assign approvers, sign and approve, deliver, track statuses, and receive documents.

A document is created from a template, optionally routed to approvers, delivered to a business partner, and tracked through a fixed set of statuses. The Document Editor is where all of this happens.

Creating a Document

Start a new document in one of two ways:

- From the **New** menu, choose **Document**.
- From the **New Document** quick link.

This opens the **Create New Document** page, which lists the templates assigned to the account, grouped by document type (for example, "300 - Sales Orders", "500 - Billing and Invoicing"). Search by name, filter by **Workspace**, or open **More Templates** for the full library. Selecting a template opens it in the **Document Editor**.

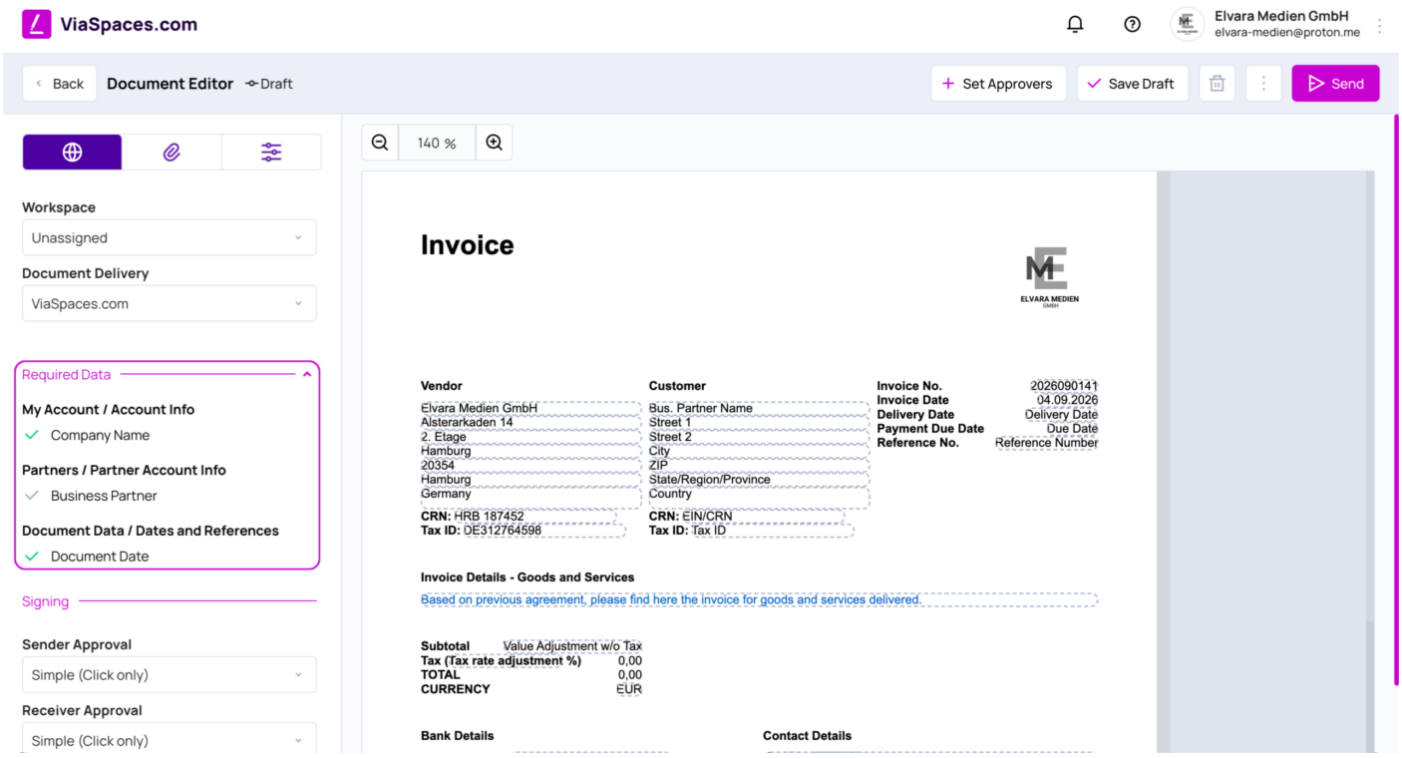
Note: A new document is unsaved until **Save Draft** is used. Save the draft first — this creates the document, places it on the dashboard, and enables the approval and signing options.

The Document Editor has a left panel with three tabs: the document view, **Attachments**, and **Settings**. The left panel also holds:

- **Workspace** — assigns the document to a workspace. The default is **Unassigned**.
- **Document Delivery** — how the document is delivered (see Types of Delivery).
- **Required Data** — a checklist of the fields a document needs before it can be sent, grouped as **My Account / Account Info** (for example, Company Name), **Partners / Partner Account Info** (Business Partner), and **Document Data / Dates and References** (Document Date). A green check marks each satisfied item.

Fill the document fields directly in the preview. Line items are added from **Items** in Master Data; only active items appear in the dropdown. Totals — net, tax, and document value — are calculated automatically, in the account's default currency set in **Settings**.

The toolbar zooms the preview and opens **PDF Preview**. A document is sent only to a business partner whose connection status is **Active**.



Assign Approvers

Approval routing is set in the **Signing** section of the left panel. This section appears after the draft is saved, and only for a document that includes signing.

Each side has an approval method:

Method	Sender	Receiver	Behavior
None	—	Available	No approval step.
Simple (Click only)	Available	Available	Approval by clicking Approve.
Signing	Available	Available	Approval with a signature.

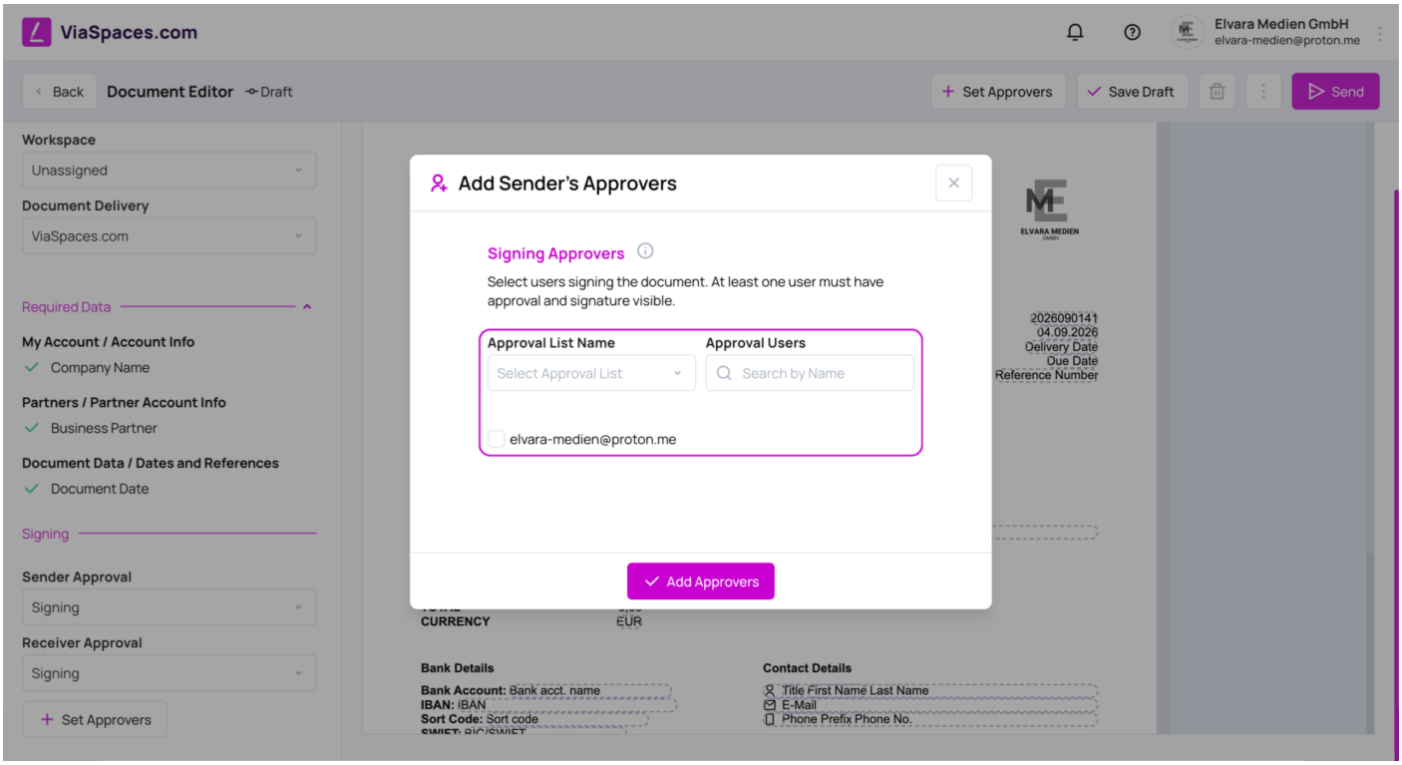
Approval runs in one of two ways:

- **Quick approval** — no internal approvers are set, so the document is approved on the sender side immediately.
- **Internal approval** — approvers are set and must act before the document proceeds.

Set Approvers is enabled after the draft is saved. It opens the **Add Sender's Approvers** dialog:

1. Select an **Approval List** by name, or search users by name under **Approval Users**.
2. Tick the approvers.
3. Click **Add Approvers**.

Inactive approval lists are not shown. Selected approvers appear in General Information and in the audit trail.

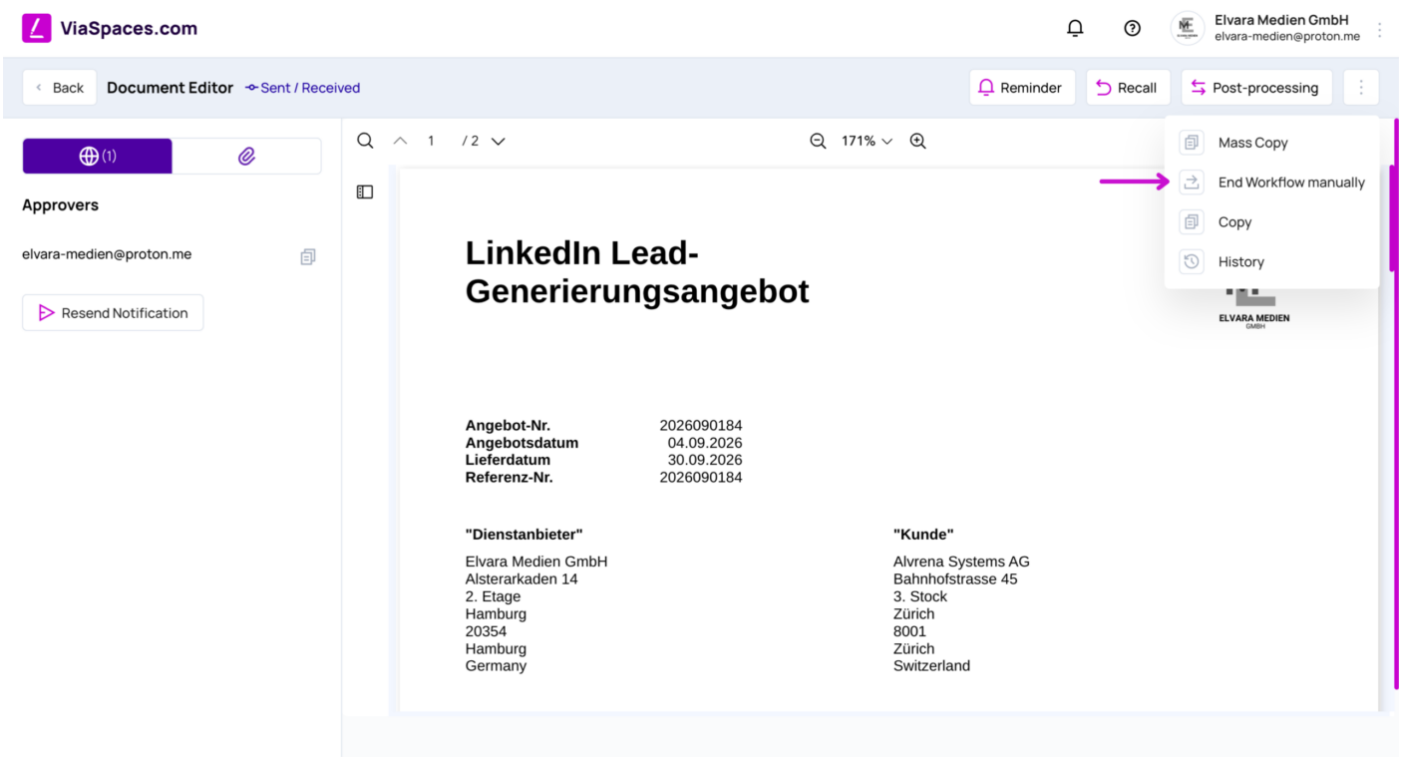


Sign and Approve

An approver acts on a document with **Approve** or **Reject**. The signing method decides how: **Simple (Click only)** approves by clicking, and **Signing** approves with a signature. Signing applies to any document whose method is set to Signing, not only to external delivery. Signatures are set up in the user profile; external recipients sign through the External Gateway.

With several approvers, all must approve for the document to complete as **Completed | Accepted**. A single **Reject** ends approval as **Completed | Rejected**.

The sender can close a document manually with **End Workflow manually** in the More menu, choosing the final status — Completed Accepted or Completed Rejected — and adding a comment.


ViaSpaces.com
Elvara Medien GmbH
elvara-medien@proton.me
Back
Document Editor
Sent / Received
Reminder
Recall
Post-processing
Mass Copy
End Workflow manually
Copy
History
Approvers
elvara-medien@proton.me
Resend Notification
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Angebotsdatum 04.09.2026
Lieferdatum 30.09.2026
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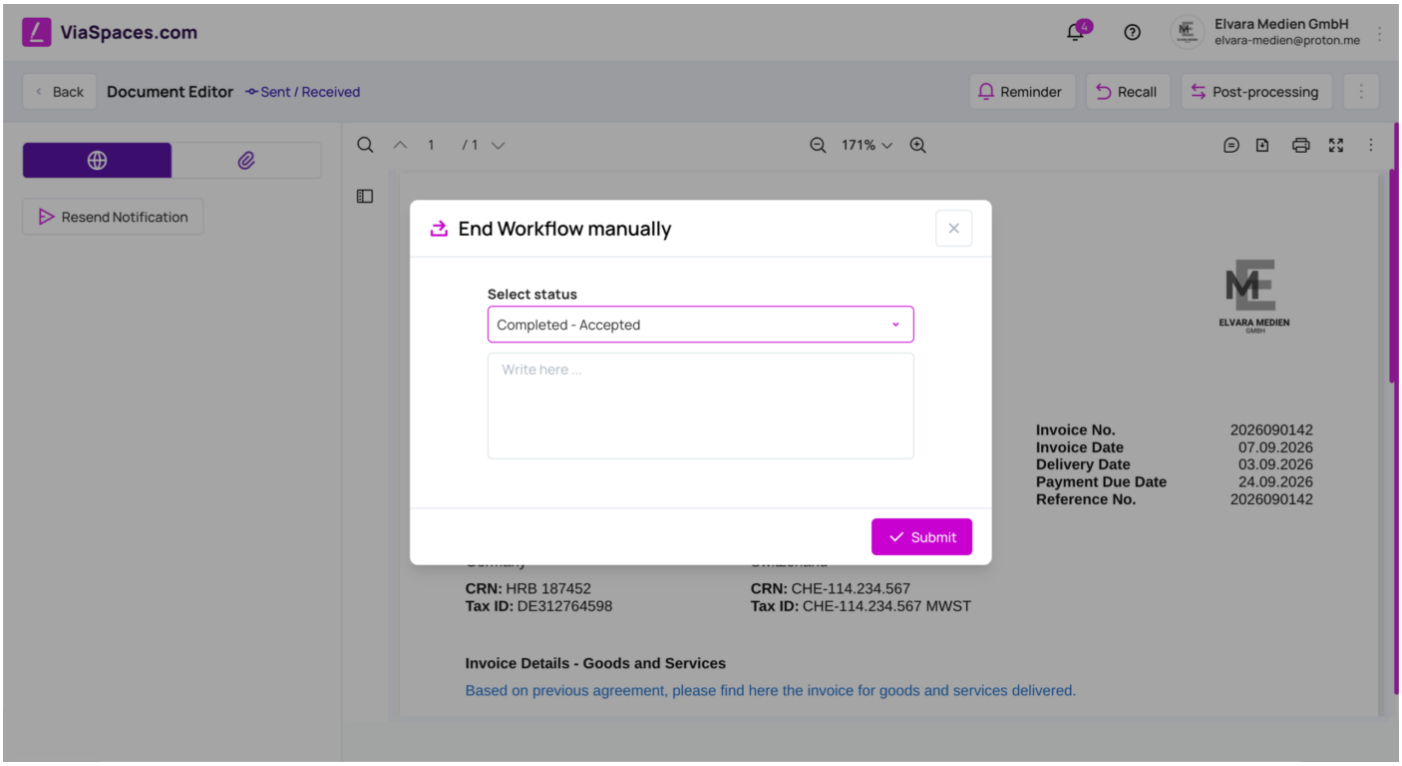
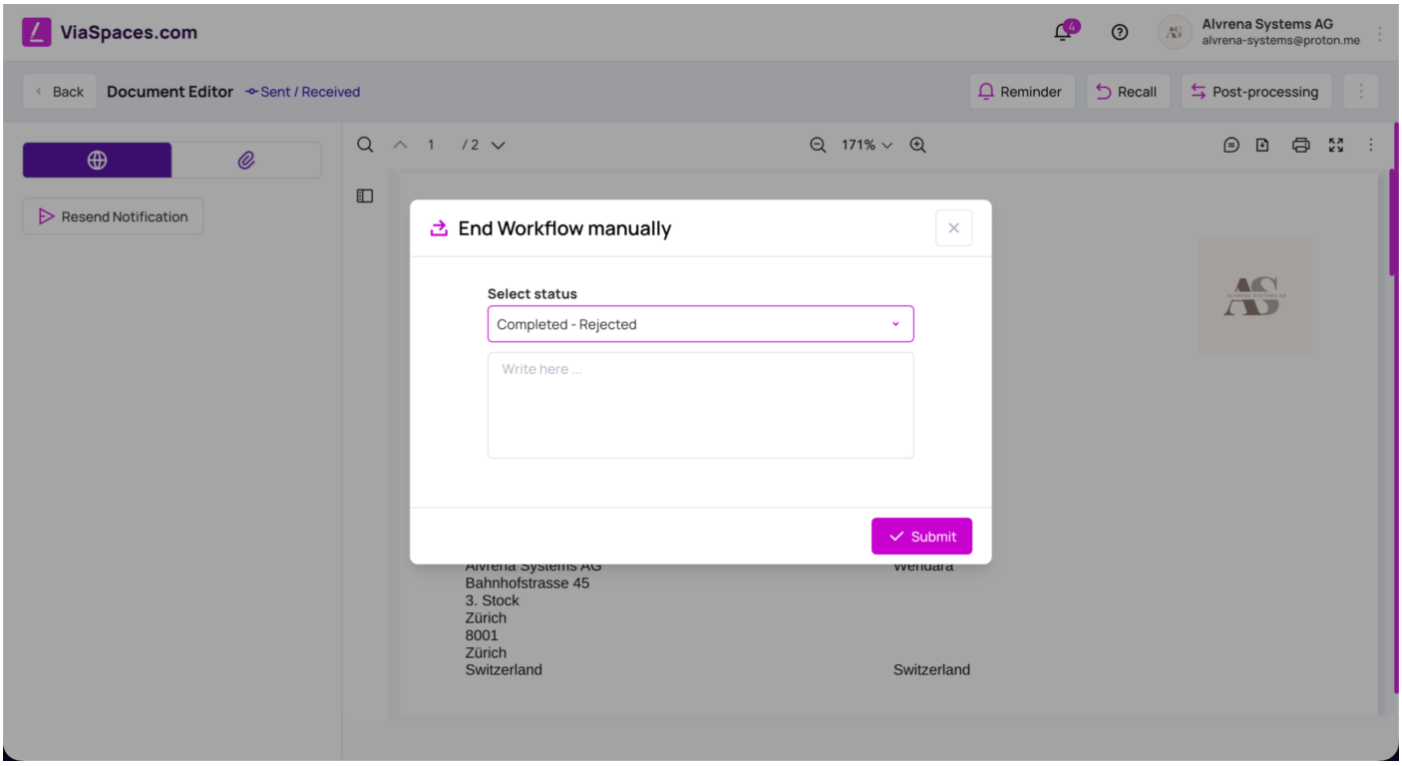

ViaSpaces.com
Elvara Medien GmbH
elvara-medien@proton.me
Back
Document Editor
Sent / Received
Reminder
Recall
Post-processing
Resend Notification
End Workflow manually
Select status
Completed - Accepted
Write here ...
Submit
Invoice No. 2026090142
Invoice Date 07.09.2026
Delivery Date 03.09.2026
Payment Due Date 24.09.2026
Reference No. 2026090142
CRN: HRB 187452
Tax ID: DE312764598
CRN: CHE-114.234.567
Tax ID: CHE-114.234.567 MWST
Invoice Details - Goods and Services
Based on previous agreement, please find here the invoice for goods and services delivered.



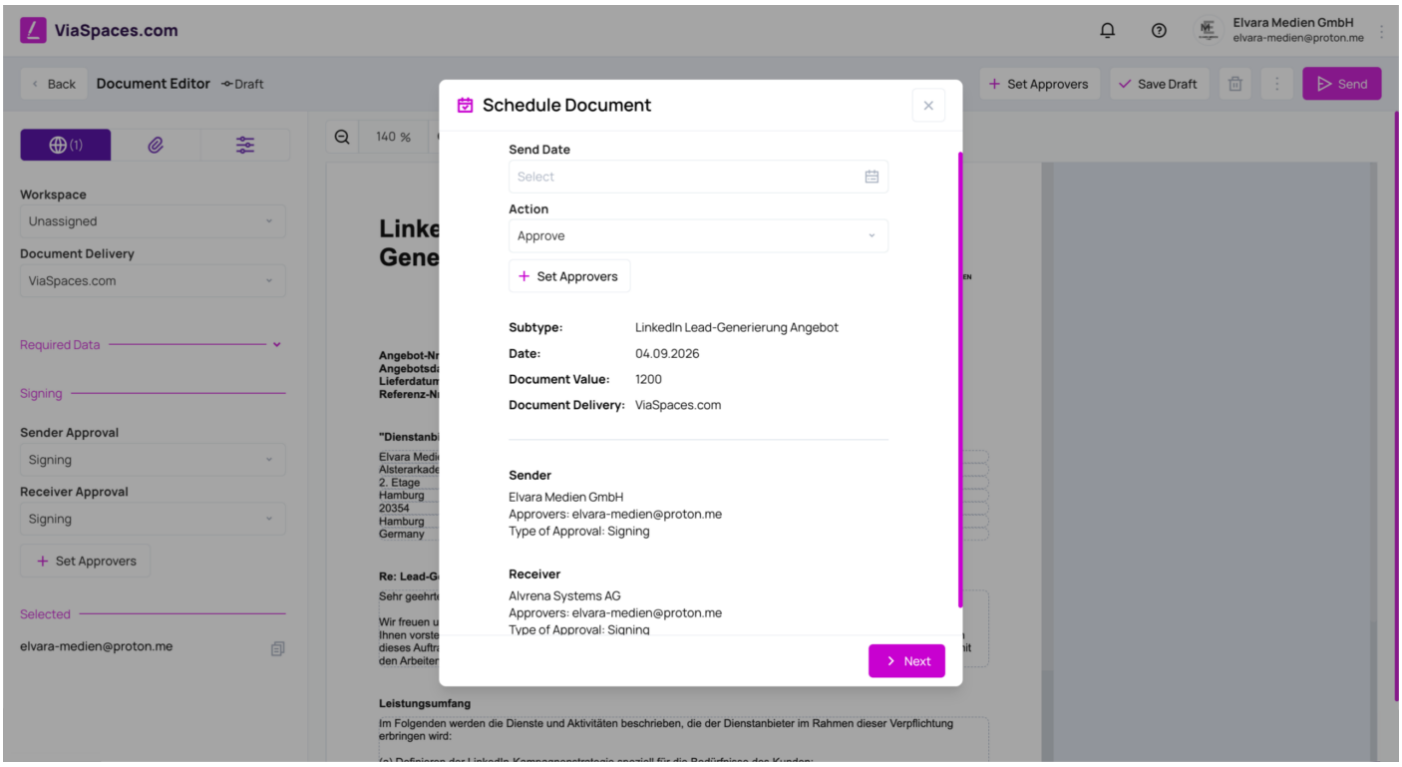
Types of Delivery

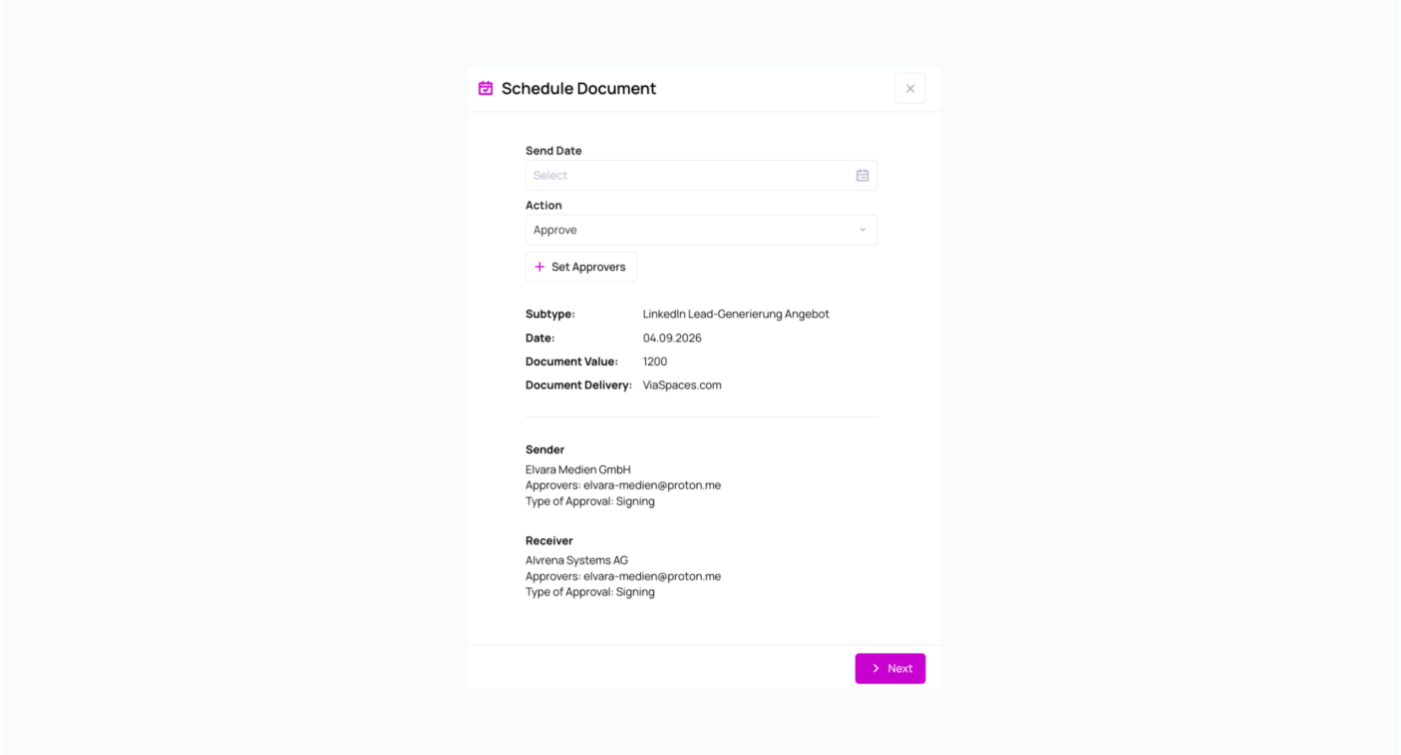
Document Delivery sets how the document reaches the partner:

- **ViaSpaces.com** — delivered inside the platform to a connected partner.
- **In Person Signing** — signed in person.
- **Offline** — handled outside the platform.

A document can also be scheduled. **Schedule Document** in the More menu sets a **Send Date** and an **Action** — **Send** or **Approve**.

Note: Scheduling a direct send removes the approvers and sends the document straight to the receiver on the chosen date.





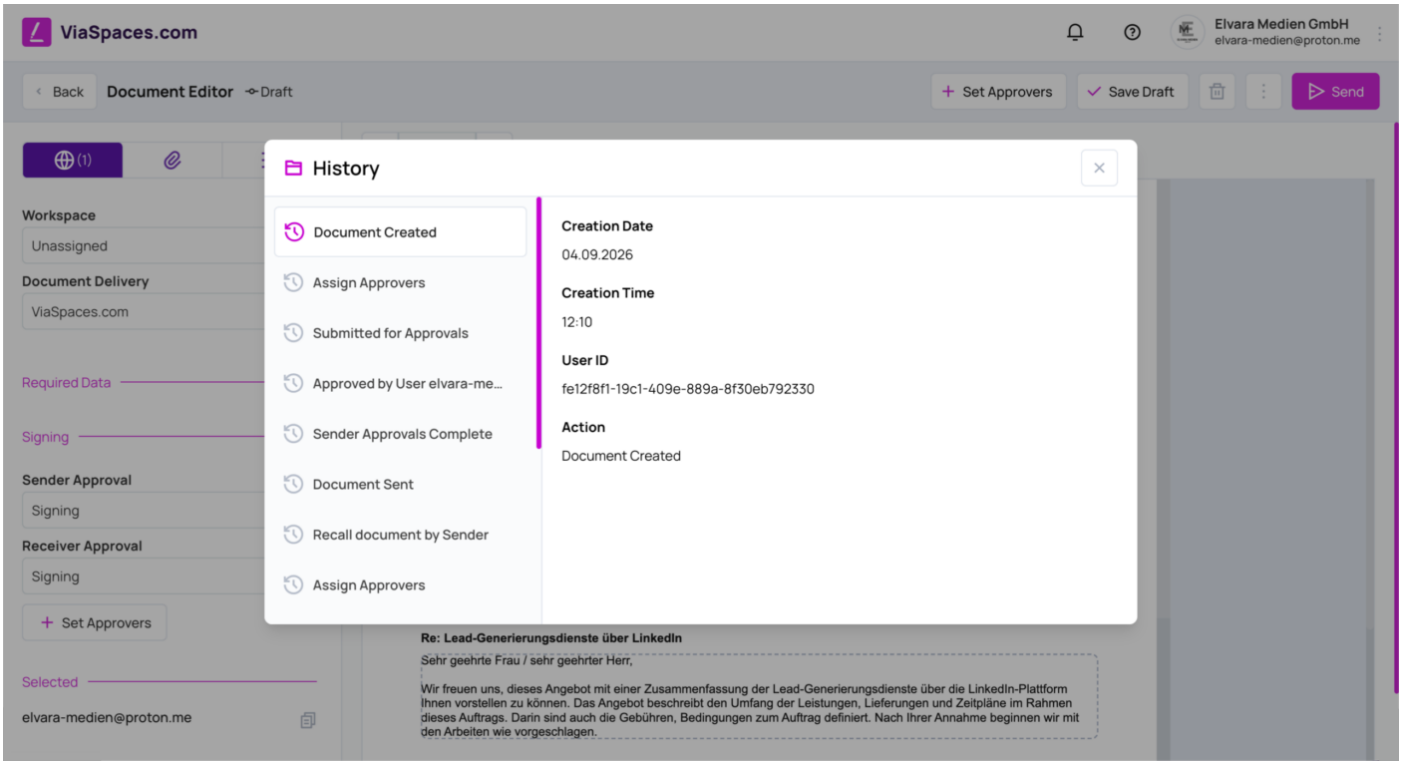
Document Statuses

A document moves through a fixed set of statuses, shown at the top of the editor.

Status	Meaning
Draft	Created and saved, not yet sent.
Sender Approving	Waiting for the sender’s internal approvers to act.
Sending	Being delivered to the partner.
Sent / Received	Sent by the sender and received by the partner.
Receiver Approval List	Receiver approvers selected, approval not yet started.
Receiver Approving	Waiting for the receiver’s internal approvers to act.
Answer	Form approved by the partner and returned to the sender for validation.
Validator Approval List	Validators selected for the returned form, validation not yet started.
Validator Approving	Waiting for the sender’s validators to act on the returned form.
Completed	Workflow ended without an approval decision.
Completed | Accepted	All approvals given.
Completed | Rejected	Rejected by an approver or ended as rejected.

History records each action with its date, time, user, and action type, forming the audit trail.

Note: A form document adds an **Answer** status while the receiver completes its fields. See the Forms page.



Receiving a Document

A received document opens in the same Document Editor as a sent one, in a different status, with a reduced left panel. The receiver reviews the document and acts with **Approve** or **Reject** according to the receiver approval method set by the sender. Pending incoming documents are listed on the Home page.

Sender Actions

The sender has actions in the toolbar and the More and Post-processing menus:

- **Save Draft** — saves the document without sending.
- **Delete Draft** — removes a draft.
- **Copy** — creates a single copy of the document.
- **Recall** — returns a sent document to Draft before it is approved.
- **Reminder** — sets a reminder with a Subject, Comments, Reminder for Users, and a Deadline.
- **Mass Copy** — creates a series of copies on a schedule.

Note: Recall, delete, export, and the full Mass Copy flow are covered on the Other Features page.

