

M-FILES CORPORATION

SETTING UP AND USING VISMA SIGN IN M-FILES

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VERSION 1.3

Contents

1.	Introduction	4
1.1	Glossary and Acronyms	4
1.2	Prerequisites	4
1.2.1	M-Files Software Requirements	4
1.2.2	Data Transfer	4
1.2.3	M-Files Visma Sign Integration	4
1.2.4	Visma Sign Subscription Plan	5
2.	Setting Up the Visma Sign Integration	5
2.1	Installing the M-Files Visma Sign Vault Application	5
2.2	Setting up the Vault Structure	5
2.2.1	Setting Property Definitions for a Visma Sign Document	5
2.2.2	Setting Property Definitions for the Signer Reference	7
2.2.3	Setting Property Definitions for the Inviter Reference (Optional)	8
2.2.4	Defining a Workflow for the Visma Sign Integration	8
2.3	Setting Up the Visma Sign Configuration in M-Files Admin	10
2.3.1	Editing General Configurations (Optional)	10
2.3.2	Defining Other Property Configurations (Optional)	11
3.	Using Visma Sign in M-Files	12
3.1	Examples of Visma Sign Documents	12
3.2	Sending Documents for Signing	13
3.3	Moving to the "Canceled" State	15
3.4	Fetching Signed Documents	15
3.5	Removing Signed Documents from organization's Visma Sign account	15
3.6	Removing Signed Documents from the user's personal Visma Sign account	16
4.	Troubleshooting	16

5. Change History.....	16
6. Reference Documents.....	16

1. Introduction

Visma Sign is an online digital signature service and can be used for signing documents when the signers do not have M-Files user accounts. When integrated with M-Files, a document that needs to be signed is sent from M-Files to Visma Sign, after which the Visma Sign service sends an email notification to the signers. Signers then sign the document via Visma Sign. Finally, the signed and updated document is added to M-Files.

This document provides instructions for setting up and using the Visma Sign vault application in M-Files. It is mainly intended for individuals responsible for implementing Visma Sign into M-Files.

The information in this document applies to application version 2.0.0.0 and later.

1.1 Glossary and Acronyms

This table explains the essential, subject-specific terminology and acronyms used in this document.

TERM	DEFINITION
Visma Sign	An online digital signature service for signing PDF documents.

1.2 Prerequisites

Please make sure your environment meets these requirements before moving forward.

1.2.1 M-Files Software Requirements

Make sure your M-Files software meets these minimum requirements:

M-FILES PRODUCT	VERSION	VAULT APP VERSION
M-Files Server	M-Files May '20 Update (20.5.9099.4) or later	2.0.0.0 →

1.2.2 Data Transfer

Communication between the Visma Sign vault application and the Visma Sign server uses the HTTPS protocol meaning that the data communication is in HTTP format and secured with [SSL/TLS](#). The communication is always initiated by the Visma Sign vault application. Thus, the only port for outgoing HTTPS traffic that needs to be opened in the firewall is the default 443.

1.2.3 M-Files Visma Sign Integration

M-Files Visma Sign Integration is an additional component that needs to be purchased separately from M-Files. To get the M-Files Visma Sign Integration component, please contact your M-Files representative.

1.2.4 Visma Sign Subscription Plan

M-Files Visma Sign Integration requires that the customer has a Visma Sign package. Refer to [Visma Sign Pricing](#) for different Visma Sign packages. The integration also requires Visma Sign API to be available. At the time of writing this document, Visma Sign API is available in all packages. Refer to Visma Sign documentation for the current API availability.

You must register your organization at Visma Sign to obtain the necessary API credentials. Visma Sign requires the use of **integration-specific API credentials**, and organization-level API credentials are no longer supported for integration use. Enter the integration-specific credentials in M-Files Admin to enable the connection to the Visma Sign service. No changes to the M-Files configuration are required when replacing existing credentials with new ones.

By default, integration-specific credentials provide access only to signing processes created through that specific integration. If broader, organization-level access to all signing processes is required, a Visma Sign administrator can extend the permissions in the Visma Sign settings.

For more information, refer to [Where can I get API-keys for my company?](#)

2. Setting Up the Visma Sign Integration

This section explains the necessary steps for setting up Visma Sign in M-Files. After you have completed these steps, you can send documents in M-Files to Visma Sign for signing.

2.1 Installing the M-Files Visma Sign Vault Application

In M-Files Admin, install the M-Files Visma Sign vault application to a vault. For instructions, refer to [Installing and Managing Vault Applications](#) in the M-Files user guide.

You can select to restart the vault after the installation or later. After you have restarted the vault, you can use Windows Event Viewer and the configurations editor for Visma Sign in M-Files Admin to check for any missing configuration parameters or incorrect configuration.

2.2 Setting up the Vault Structure

This section tells you what metadata elements are necessary in the target vault before you can configure M-Files Visma Sign Integration. You can create metadata elements or use existing elements.

For more information on the necessary M-Files metadata elements and configurations, refer to these pages in the M-Files user guide:

- [Property Definitions](#)
- [Configuring Workflows](#)
- [Workflow States](#)
- [Object Types](#)

2.2.1 Setting Property Definitions for a Visma Sign Document

A Visma Sign document represents the document that is sent to Visma Sign for signing. It is gotten from Visma Sign after it has been signed. If it is a multi-file document, it can contain only one PDF file that is sent for signing. The document does not need to have a specific class or object type.

In M-Files Admin, create at least the required metadata elements according to the information in the table that follows. For instructions, refer to [Editing the Vault Metadata Structure](#) in the M-Files user guide.

TYPE	NAME (EXAMPLE)	REQUIRED	DESCRIPTION	VAULT APP VERSION
Property, Text	Visma Sign Document GUID	Yes	Property for the Visma Sign identifier. This property is necessary for document status checks and removals. M-Files adds and fills this property automatically to the document metadata after the document has been sent for signing. This property value should not be changed manually. You can, for example, hide it from the metadata card.	2.0.0.0 →
Property, Text	Visma Sign Document Status	Yes	Property for the status of the document according to Visma Sign. Typically, either <i>Pending</i> or <i>Signed</i> . M-Files adds and fills this property automatically to the document metadata after the document has been sent for signing. This property value should not be changed manually.	2.0.0.0 →
Property, Choose from list (multi-select)	Simultaneous Signers	Yes (unless only ordered signers are used)	The reference to the signer objects. When two or more signers are selected in the same multi-select property, invitations are sent to all of them simultaneously. You can use an existing property definition, such as <i>Contact Person</i> , as the signer reference property.	2.0.0.0 →
Property, Choose from list	Ordered Signer X	Yes (unless only simultaneous signers are used)	The reference to a signer object. When a signer is selected in this property, an invitation is sent that user. After they have signed, an invitation is sent to the next signer, and so on. Add as many of these properties as there are signers. It is not possible to select more than one signer per each invitation round. You can use existing property definitions as the ordered signer reference properties.	2.0.0.0 →
Property, Choose from list	Visma Sign Inviter	No	The reference to the inviter object. The signing invitations contain the inviter name. Notifications about completed signing operations are sent to the inviter by email.	2.0.0.0 →
Property, Boolean	Visma Sign Strong Authentication	No	A property for specifying whether the signers must sign the document with strong authentication. This property overrides the default setting in Visma Sign configuration for the current document. The same authentication type is used for all signers for each document. It cannot be selected separately for different signers.	2.0.0.0 →
Property, Boolean	Remove from Visma Sign when complete (organization)	No	A property for specifying whether the completed document is removed from the organization's Visma Sign account after it has been saved to M-Files. The use of this property overrides the default setting in Visma Sign configuration.	2.0.0.0 →
Property, Boolean	Remove from Visma Sign when complete (personal)	No	A property for specifying whether the document is removed from the user's personal Visma Sign account after it has been signed. The use of this property overrides the default setting in Visma Sign configuration.	2.0.0.4 →

Property, Choose from list	Visma Sign Language	No	A property for specifying the language for Visma Sign emails and user interface. This property overrides the default setting in Visma Sign configuration. Valid values: fi, sv, en, nb, or da. The selected language is used for all signers for each document. It cannot be selected separately for different signers. For the inviter, the default language set in the Visma Sign configuration is always used.	2.0.0.0 →
Property, Text (multi-line)	Visma Sign Email Message	No	A property for the message to be added to the email that is sent to the signers to request signature. This property overrides the default message set in Visma Sign configuration.	2.0.0.0 →
Property, Boolean	Send Visma Sign Password as SMS	No	A property for specifying whether a password for the access to the document in Visma Sign is sent to the signers as a separate text message. This property overrides the default setting in Visma Sign configuration. To use this property configuration, the signer's phone property definition must be added to the signer reference (see Table 2).	2.0.0.0 →
Property, Text (multi-line)	Visma Sign SMS Message	No	A property for the message to be added to the text message that contains the password. The length of the message must be between 10 and 160 characters.	2.0.0.0 →
Property, Boolean	Add Visma Sign Document as Attachment	No	A property for specifying whether a PDF version of the document can be attached to Visma Sign emails. This property overrides the default setting in Visma Sign configuration.	2.0.0.0 →
Property, Boolean	Send Notification of Completed Signing	No	A property for specifying whether an email is sent to the signers when all signers have signed the document. This property overrides the default setting in Visma Sign configuration.	2.0.0.0 →

Table 1: The property definitions for Visma Sign documents.

2.2.2 Setting Property Definitions for the Signer Reference

The signer reference is a property of the Visma Sign document as described in [Table 1](#). If you use ordered signing, you must have two or more signer properties, one for each signing round. You can use either simultaneous or ordered signing for each document if both are configured. In M-Files Admin, create metadata elements for each signer reference (see [Table 2](#)). For instructions, refer to [Editing the Vault Metadata Structure](#) in the M-Files user guide.

TYPE	NAME (EXAMPLE)	REQUIRED	DESCRIPTION	VAULT APP VERSION
Property, Text	Name	Yes	The name of the signer. The <i>Name</i> property must be one of the properties of the signer object type.	2.0.0.0 →
Property, Text	Email	Yes	The email address of the signer. The <i>Email</i> property must be one of the properties of the signer object type. Visma Sign sends signing requests to the email address entered as the value of this property.	2.0.0.0 →
Property, Text	Phone	No	The phone number of the signer. To enable sending passwords as text messages, the <i>Phone</i> property must be one of the properties of the signer object type. When enabled, Visma Sign sends the password as a separate text message, not in the invitation email. The number must be entered in the following format (without spaces): +<country code><area code><phone number> For example:	2.0.0.0 →

			+358501234567	
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Table 2: The metadata elements for signers.

2.2.3 Setting Property Definitions for the Inviter Reference (Optional)

The inviter reference is an optional property of the Visma Sign document as described in [Table 1](#). In M-Files Admin, create metadata elements or use existing elements (see [Table 3](#)).

If a value for the inviter property is not entered to the document metadata, Visma Sign uses the company name and email address with which the company was registered to Visma Sign.

TYPE	NAME (EXAMPLE)	REQUIRED	DESCRIPTION	VAULT APP VERSION
Property, Text	Name	No	The name of the inviter. The <i>Name</i> property must be one of the properties of the inviter object type. The value is sent to Visma Sign as the name of the inviter.	2.0.0.0 →
Property, Text	Email	No	The email address of the inviter. The <i>Email</i> property must be one of the properties of the inviter object type. Visma Sign uses this email address as the original sender of the invitation. In some cases, Visma Sign can select not to use it to prevent invitation emails from being falsely identified as spoofing attempts by email servers. Upon each signature and when all the signatures are ready, Visma Sign sends an email to this address.	2.0.0.0 →

Table 3: The metadata elements for an inviter.

2.2.4 Defining a Workflow for the Visma Sign Integration

A Visma Sign workflow is necessary for sending documents in M-Files to Visma Sign for signing. Create a new workflow or edit an existing workflow according to the information in the table that follows.

TYPE	NAME (EXAMPLE)	REQUIRED	DESCRIPTION	VAULT APP VERSION
Workflow	Visma Sign Workflow	Yes	The workflow set for the documents that are to be signed in Visma Sign.	2.0.0.0 →
Workflow state	Unsigned	Yes	The workflow state for indicating that the document is unsigned.	2.0.0.0 →
Workflow state	Sent for Signing	Yes	The workflow state for indicating that the document has been sent for signing in Visma Sign.	2.0.0.0 →
Workflow state	Signed	Yes	The workflow state for indicating that the document has been signed.	2.0.0.0 →
Workflow state (optional)	Deleted	No	The workflow state for indicating that the document is in the deleted state in Visma Sign. Note: The deleted state in Visma Sign indicates that the document was deleted before any invitations were created for it.	2.0.0.0 →
Workflow state	Canceled	Yes	The workflow state for indicating that the signing process has been canceled.	2.0.0.0 →

Workflow state (optional)	Invalid	No	The workflow state for indicating that the document is in the invalid state in Visma Sign.	2.0.0.0 →
Workflow state transition	From "Unsigned" to "Sent for signing"	Yes	The state transition from the "Unsigned" state to the "Sent for signing" state.	2.0.0.0 →
Workflow state transition	From "Sent for signing" to "Canceled"	Yes	The state transition from the "Sent for signing" state to the "Canceled" state.	2.0.0.0 →

Table 4: Workflow for Visma Sign configuration.

A sample workflow and its allowed state transitions are shown in [Image 1](#). When a document object is checked in, the Visma Sign vault application checks the workflow state transition. The document is initially in the "Unsigned" state. When you change the status to "Sent for Signing", the vault application checks the conditions, such as PDF content and metadata. If the necessary conditions are met, the document is sent to Visma Sign for the signing process and the status of the document is changed. The vault application periodically checks the state of the sent documents at Visma Sign and gets the documents when they have been signed, changing the workflow state automatically to the "Signed" state. When the document status is still "Sent for Signing", you can cancel the signing process by changing the status to "Canceled".

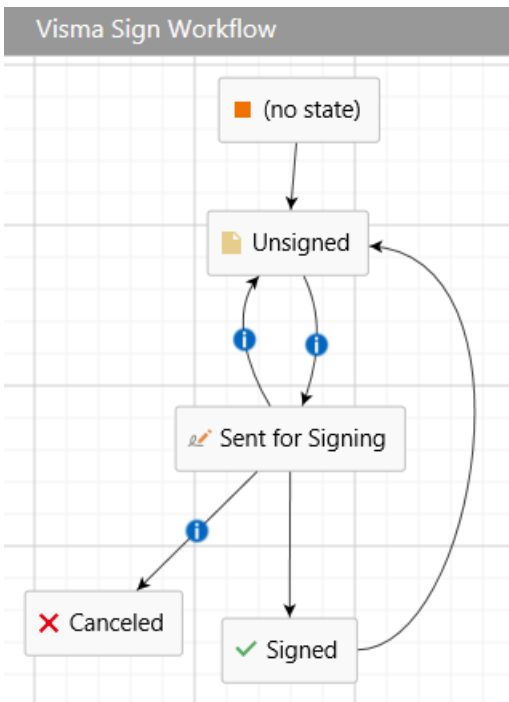


Image 1: States and state transitions in the Visma Sign workflow.

If the optional states "Invalid" and "Deleted" are not used, the documents in these states in Visma Sign are moved back to the "Unsigned" state. The state of these documents will no longer be checked from Visma Sign.

If a user manually removes the document from Visma Sign, the document is not found when M-Files checks its status from Visma Sign. The status of the document is not changed but a warning is written to the Windows event log.

You can have multiple Visma Sign workflows and use them with different document classes. It is also possible to edit an existing class-specific workflow to trigger the Visma Sign process.

Each workflow can use the same or different signer and inviter objects. You must configure the signer and inviter references for each workflow (see section 2.3).

2.3 Setting Up the Visma Sign Configuration in M-Files Admin

When you have set up the vault structure, you must set configuration values in M-Files Admin to take Visma Sign Integration into use. To do this, vault administrator credentials are necessary. For the most configuration values, you can use the default values. Specify at least all the mandatory configuration values.

To set up the Visma Sign configuration:

1. Open M-Files Admin and go to a vault.
 - Open M-Files Admin.
 - In the left-side tree view, expand a connection to M-Files Server.
 - In the left-side tree view, expand **Document Vaults**, and then expand a vault.
2. In the left-side tree view, select **Configurations**.
3. In the gray navigation area, select *Other Applications > M-Files Visma Sign Integration*.
4. Open the *Configuration* tab.

All the mandatory fields that you must define are highlighted in red when they are not set or valid.
5. Expand *Authentication Configurations* and specify the *Client Identifier* and *Client Secret* of the Visma Sign API credentials.

NAME	TYPE	DEFAULT VALUE	DESCRIPTION
Client Identifier	String	""	The client ID of the Visma Sign API credentials.
Client Secret	String	""	The secret key of the Visma Sign API credentials.

Table 5: Authentication configurations.

6. Expand *Property Configurations* and set values to *Visma Sign Document GUID* and *Visma Sign Document Status*. For the descriptions of these properties, see [Table 1](#).
7. Expand *Workflow Configurations* to set values for the workflow, the states, and the state transitions. You can configure multiple workflows. For the descriptions of the workflow items, see [Table 4](#).

Configure the signer and inviter reference properties within each workflow. You can configure simultaneous signers, ordered signers, or both for each workflow. For a single document, however, you can only use one type of signing process. You can use the same signer properties for different workflows, but they need to be configured explicitly for each of them. The inviter configuration is optional.
8. **Optional:** Specify the other settings where necessary.

For more information, select a setting and see the *Info* tab.
9. Click **Save**.

2.3.1 Editing General Configurations (Optional)

To access the general settings, expand **General Configurations** on the *M-Files Visma Sign Integration Configuration* tab. See the table that follows and edit the values that you want.

NAME	TYPE	DEFAULT VALUE	DESCRIPTION
Visma Sign Environment	"Production" or "Demo"	Production	Specifies whether Visma Sign production or demo environment is used. If you change the value for this setting, you must enter the related credentials to <i>Authentication Configurations</i> . Note that the demo environment is meant for demonstration purposes only. Documents signed there are not intended to be legally binding.
Fetch Signed Documents	Boolean	Yes	When this is set to "Yes", the documents signed by the signers are fetched from Visma Sign.
Status Checking Interval	Integer	20	Specifies the interval in minutes for checking for new signed documents from Visma Sign. The minimum interval is 5 minutes.
Use Strong Authentication as Default	Boolean	Yes	Specifies whether signers must by default sign the documents with strong authentication.
Remove Completed Documents from Visma Sign (Organization)	Boolean	No	If this is set to "Yes", the completed documents are removed from organization's Visma Sign account after they are saved to M-Files.
Remove Completed Documents from Visma Sign (Personal)	Boolean	No	If this is set to "Yes", completed documents are removed from the user's personal Visma Sign account after they are signed. Note that documents cannot be deleted from a personal account after invitations are sent.
Default Visma Sign Language	String	fi	The default language for Visma Sign emails and user interface. The default value is "fi". Valid values are "fi" (Finnish), "sv" (Swedish), "en" (English), "nb" (Norwegian), and "da" (Danish).
Default Email Message	String	-	The default message to be added to the email that is sent to signers to request signature.
Send Passwords as SMS	Boolean	No	If this is set to "Yes", passwords for getting access to documents in Visma Sign are by default sent to signers as separate SMS messages. If this setting is enabled, the password is not included in the email message from Visma Sign.
Add Documents as Attachments	Boolean	No	If this is set to "Yes", PDF versions of Visma Sign documents can be attached to Visma Sign emails. These include notifications to signers and senders when the signing process is completed.
Enable Notifications of Completed Signing	Boolean	Yes	When this is set to "Yes", a notification is by default sent to signers when all signers have signed a document.
Write Debug Information	Boolean	No	If this is set to "Yes", debug information about document status checks is written to the Windows event log.

Table 6: General configurations.

2.3.2 Defining Other Property Configurations (Optional)

In addition to the mandatory property configurations *Visma Sign Document GUID* and *Visma Sign Document Status*, you can define the other available property configurations. With these properties, you can override the general settings for the current document.

Expand **Property Configurations** on the *M-Files Visma Sign Integration Configuration* tab and set the values that you want. By default, the property configurations are not set.

If you have created the necessary property definitions, you can configure these advanced property configurations:

- Property for Strong Authentication Setting
- Property for Completed Document Removal (Organization)
- Property for Completed Document Removal (Personal)
- Property for Visma Sign Language
- Property for Email Message
- Property for "Send Password as SMS" Setting
- Property for SMS Message Content
- Property for "Add Document as Attachment" Setting
- Property for "Send Notification of Completed Signing" Setting

For the descriptions of the properties, see [Table 1](#).

3. Using Visma Sign in M-Files

When a document has one PDF file and it is in the appropriate Visma Sign workflow with the appropriate Visma Sign property values, the document can be sent to Visma Sign for signing. The vault application periodically checks the state of the documents at Visma Sign and gets the documents when they have been signed.

This section tells you how to send documents for signing and how to follow the status of the signing process.

3.1 Examples of Visma Sign Documents

Below is one example of creating a new Visma Sign document. M-Files fills values to some of the necessary properties automatically. The user must enter values to the other necessary properties.

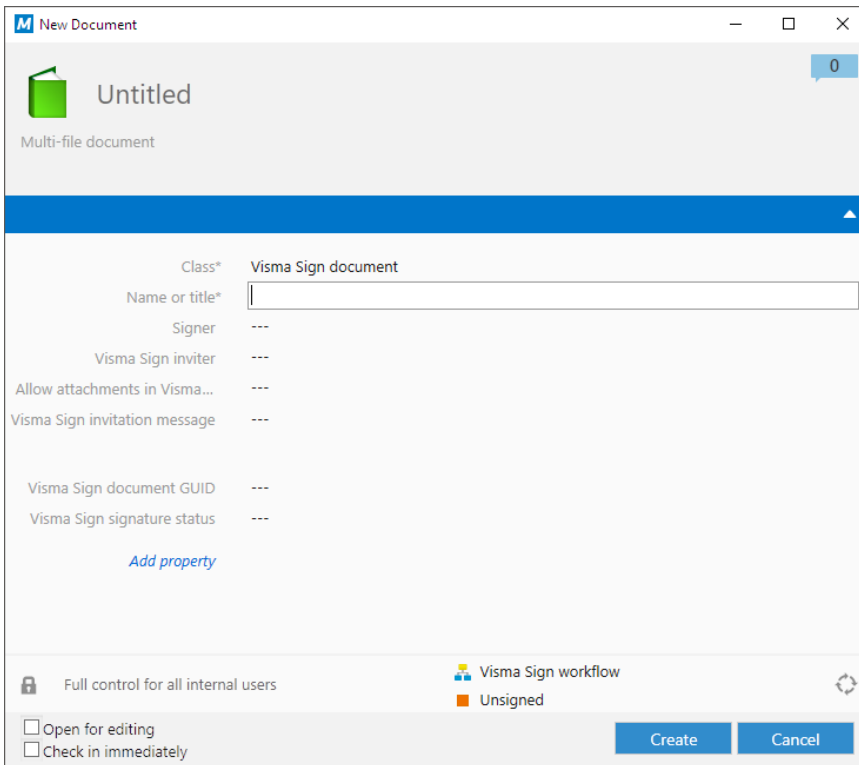


Image 2: Example of creating a new Visma Sign document.

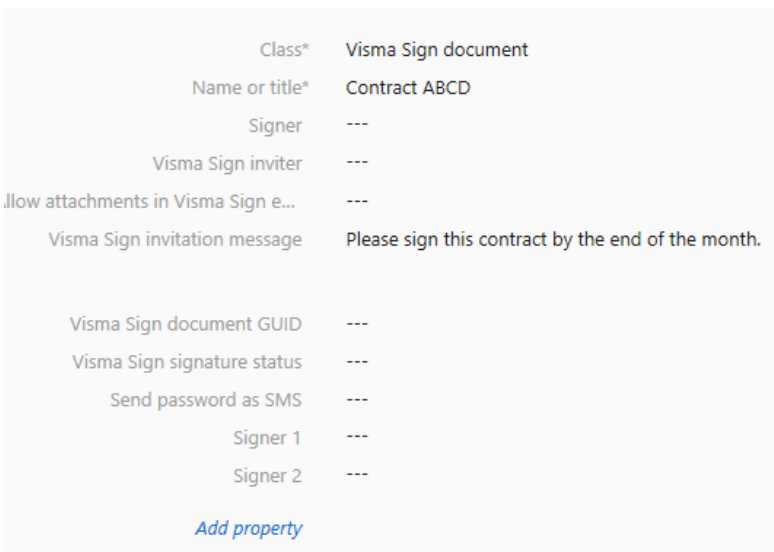


Image 3: Example of document metadata with signing order enabled (properties *Signer 1* and *Signer 2*).

3.2 Sending Documents for Signing

To prepare a document for signing with a standard Visma Sign workflow (see section 2.2.4):

1. Open the M-Files client.
2. Complete one of these steps:

- a. Create a document that you want to send for signing. For more information, refer to [Creating a Document](#) in the M-Files user guide.
- or
- b. Find the document that you want to send for signing.

The document can be a single-file document or a multi-file document that contains exactly one PDF file when it is sent for signing. The multi-file document can have other files in other formats.

Make sure that the PDF file does not exceed the maximum size of 15 MB in production environment and 1,5 MB in demo environment.

3. On the document metadata card, click **Add property** and complete one of these steps:
 - a. To send the invitation emails simultaneously to all signers, add the **Simultaneous Signers** property.
 - b. In the *Signers* field, select the signers.
 - or
 - a. To use a signing order, add the properties **Signer 1**, **Signer 2**, and so on.
 - b. In each signer field, select one signer.

You cannot use both simultaneous and ordered signing for the same document. If both signer properties are added to the document metadata, only simultaneous signers are selected.

4. **Optional:** Add the **Visma Sign Inviter** property and select the inviter that is shown as the original sender of Visma Sign invitation emails. Visma Sign will also send emails of the document status changes to the specified inviter.
5. **Optional:** Add the **Visma Sign Email Message** property and enter a message that is added to the Visma Sign invitation email.
6. **Optional:** Add other properties and enter values for them. The available Visma Sign properties depend on your Visma Sign integration configuration (see section 2.3).
7. **Optional:** Convert the file that you want to send for signing to the PDF format. If your Visma Sign workflow does this automatically, this step is not necessary.

To send the document for signing:

1. Click the workflow field at the bottom of the document metadata card and select a Visma Sign workflow.
Result: The *Change State* dialog is opened.
2. Complete one of these steps:
 - a. Enter a comment and click **OK** to close the dialog.
 - or
 - b. Click **Cancel** to close the dialog.
3. On the metadata card, click **Save**.
4. Click the workflow status field at the bottom of the metadata card and change the status first to **Unsigned** and then to **Sent for Signing**. When the *Change State* dialog is opened, do the step 2.
5. On the metadata card, click **Save**.

Result: The value for the *Visma Sign Document GUID* property is added to the document metadata. The value *Pending* is added to the *Visma Sign Document Status* property.

Visma Sign now sends signature invitation emails to the signers defined.

3.3 Moving to the "Canceled" State

After the document has been sent for signing, it is still possible to cancel the signing process if all the signers have not yet signed the document. Select the document whose signing process you want to cancel and, on the metadata card, change the workflow state to *Canceled*.

When the signing process is canceled, the following actions take place in the metadata of the object:

- The value *Canceled* is added to the *Visma Sign Document Status* property.

When the signing process is canceled, the following actions take place at Visma Sign:

- The state of the document becomes *Canceled* and the signers cannot get access to it.

3.4 Fetching Signed Documents

By default, the Visma Sign vault application checks every 20 minutes the Visma Sign server for possible signature status changes of pending documents. You can adjust the frequency by changing the value of *Status Checking Interval* in M-Files Admin (see Table 6).

When all the signatures are ready for a document, the following actions take place in M-Files:

- The signed version of the PDF file is added to M-Files, replacing the unsigned version.
- The value of the *Visma Sign Document Status* property is changed to *Signed*.
- The workflow state is changed to *Signed*.

When all the signatures are ready for a document, the following actions take place in Visma Sign:

- Nothing happens. The signing process has already been completed and the status of the document has been updated accordingly.

3.5 Removing Signed Documents from organization's Visma Sign account

You can define that the completed documents are removed from the organization's Visma Sign account after they have been saved in M-Files. By default, no documents are removed from Visma Sign. To change the default behavior, change the value of **Remove Completed Documents from Visma Sign (Organization)** to **Yes** in M-Files Admin (see Table 6). You can also add a property to override the default setting document-specifically (see Table 1).

The document is removed from the organization's Visma Sign account after an interval of two minutes after the completed document has been saved in M-Files. Before this, these conditions of the M-Files document are checked:

- The value for the *Visma Sign Document Status* property is *Signed*.
- The workflow state is not *Sent for Signing*.

If the removal for some reason fails (for example, the document has already been manually removed or the conditions are not met), the operation is not tried again because it is unlikely that the conditions change. Messages of the failed removals are written to the Windows event log. Where necessary, you can try to locate the documents at Visma Sign with their document GUID and delete them manually.

Documents that were marked to be removed from the organization's Visma Sign account are removed even if the document is currently marked as "Deleted" in M-Files. If a document can no longer be found in M-Files (for example, when it has been destroyed), the Visma Sign vault application still tries to remove the document from Visma Sign. If the deletion cannot be completed, the failure is recorded to the Windows event log.

3.6 Removing Signed Documents from the user's personal Visma Sign account

You can define that the completed documents are removed from the user's personal Visma Sign account after they are signed. By default, no documents are removed from the user's personal Visma Sign account. To change the default behavior, change the value of **Remove Completed Documents from Visma Sign (Personal)** to **Yes** in M-Files Admin (see Table 6). You can also add a property to override the default setting document-specifically (see Table 1).

For this option to operate correctly, it must be taken into use before any signing invitations are sent. The order to remove the document is sent when the invitations are sent. After that, Visma Sign eventually completes the removal. The documents cannot be removed from the user's personal Visma Sign account after the invitations are sent.

4. Troubleshooting

Issue

The setup is complete but documents are not sent to Visma Sign.

Possible fix

Open the Event Handlers dialog in M-Files Admin and make sure that these event handlers are visible and enabled:

- `VismaSignVaultApp.MFEventHandlerBeforeCheckInChanges`
- `VismaSignVaultApp.MFEventHandlerVaultExtensionMethod`

5. Change History

The table below describes the essential changes by document version.

VERSION	DATE	ESSENTIAL CHANGES
1.0	2021/06/24	Initial version.
1.1	2021/07/02	Updated section 1.2.3.
1.2	2023/10/09	Added information about the removal of documents from users' personal Visma Sign accounts.
1.3	2026/04/23	Updated section 1.2.4 to reflect new integration-specific API credential requirements.

6. Reference Documents

You may want to see these articles for additional information:

- [Where can I get API-keys for my company?](#)