DocuFlow

USER MANUAL · NEXT, UNRELEASED

Everything in DocuFlow, explained.

How to sign in, what each tool does and the exact steps to use it, how files and sharing work.

PDF tools | Convert | Files & sharing | Desktop app

A Xelvian product

Contents

1. **Getting started** 5
   - 1.1. Signing in and out 6
   - 1.2. Tools 8
2. **Organise PDFs** 11
   - 2.1. Merge PDF 12
   - 2.2. Split PDF 13
   - 2.3. Rotate pages 14
   - 2.4. Rearrange pages 14
   - 2.5. Delete pages 15
   - 2.6. Extract pages 15
   - 2.7. Add blank pages 16
   - 2.8. Compress PDF 16
   - 2.9. Add page numbers 17
   - 2.10. N-up layout 18
   - 2.11. Booklet 19
3. **Edit PDFs** 20
   - 3.1. The editor 20
   - 3.2. Add watermark 23
   - 3.3. Sign PDF 24
   - 3.4. Black out parts of a PDF 25
   - 3.5. Fill PDF forms 25
   - 3.6. Edit as image 26
4. **Convert** 28
   - 4.1. Word/Excel/PowerPoint to PDF 29
   - 4.2. PDF to Word (best effort) 30
   - 4.3. PDF to Excel (best effort) 31
   - 4.4. PDF to PowerPoint (best effort) 32
   - 4.5. PDF to images 33
   - 4.6. Images to PDF 34
   - 4.7. PDF to text 35
   - 4.8. PDF to Markdown 35
   - 4.9. PDF to HTML 35
   - 4.10. HTML to PDF 36
   - 4.11. OCR (make searchable) 36

5. Images 38
5.1. Resize image 38
5.2. Compress image 40
5.3. Rotate image 42
5.4. Remove background 42
5.5. Convert images 44
5.6. SVG to image 45
5.7. Image to SVG 45

6. Protect & check 47
6.1. Protect with a password 47
6.2. Remove a password 48
6.3. Flatten PDF 49
6.4. Sanitize PDF 49
6.5. Compare PDFs 50
6.6. Repair PDF 51
6.7. Edit metadata 51

7. Utilities & Nepal 53
7.1. QR code 53
7.2. Barcode 55
7.3. Bikram Sambat ⇄ AD 55
7.4. Nepali typing 56
7.5. Letter templates 59
7.6. Making or changing a template (the builder) 62
7.7. Drafts, versions and sharing 70
7.8. If something goes wrong in the builder 74

8. Files 76
8.1. Folders 77
8.2. The Archive tab (administrators) 81
8.3. Uploading files 82
8.4. Search and filters 83
8.5. The file table 83
8.6. Previewing a file 85
8.7. Sharing a file 86
8.8. Files in Google Drive or OneDrive 87

9. Activity 90
9.1. Your activity 91
9.2. What each sentence says 93

10. For administrators **96**
10.1. People 97
10.2. Settings 101
10.3. Integrations 102
10.4. Letters 104
10.5. Activity log 106
11. Desktop app **107**
11.1. Working offline 108
11.2. Saving, editing and files on desktop 110
11.3. Drives and letter templates on desktop 112
11.4. Signing in on desktop 112
11.5. If the online engine is unavailable 113
12. Notifications **114**
12.1. The bell 114
12.2. File requests 115
12.3. E-mails 116

1. Getting started

This module gets you from opening DocuFlow for the first time to finding the right tool for a file. It is for anyone in your organisation who needs to work with a document — no training required.

Everything here applies to the web app; where the desktop app works differently, this module says so and points you to Desktop app for the rest.

Before you start

On the web, you need your organisation's usual account — the one your IT department or administrator set up for you. Nothing else: no separate DocuFlow password, no sign-up form. The desktop app does not need an account at all to start working; signing in there only adds syncing (see Desktop app).

You don't need a particular kind of file to get started. DocuFlow recognises PDFs, images and several other document kinds; whatever you drop or pick, it either opens straight into the right place or shows you the tools built for it.

Finding your way around

Once you're in, the sidebar on the left has three links: **Tools** (the page this module covers), **Editor** (where PDF and image work actually happens once a file is open) and **File Library** (files you've uploaded or that others have shared with you — see Files). Your account menu, in the top right, has **Your activity** (see Activity) and, if you administer DocuFlow for your organisation, an **Admin** link.

You won't usually open **Editor** directly from the sidebar — it's normally reached by opening a tool or dropping a file, which lands you there already set up for what you asked for. The link exists mainly so you can get back to it if you've navigated away.

What happens to your files

Three short promises sit at the bottom of the Tools page:

- **Private by default** — "Files are checked on your device before anything is uploaded."
- **Fast and focused** — "Make your changes on screen and see progress while your files are processed."
- **Ready for work** — "Dependable tools for everyday documents."

In practice this means: DocuFlow looks at your file on your own device first, and only sends it onward when a tool needs to do the actual work. That work — converting, compressing, watermarking, and so on — is done by your organisation's own document-processing engine,

not by an outside company's servers. Some tools (marked as such where they matter, for example on the desktop app when you're offline) can do their work entirely on your device without sending the file anywhere. See Desktop app for exactly which tools those are.

The sidebar carries the same point in its own words, under the heading "Your files stay private": "Files are only uploaded when you process them or save them to your library." Nothing you drop onto the Tools page leaves your device just for being dropped — it's only sent onward once you actually run a tool on it, or choose to save it to your library.

The desktop app, briefly

If you're using the desktop app rather than a browser, two things are different from what's described above: you can open the app and start working on the Tools page without signing in at all, and several tools keep working even with no internet connection. Signing in there only adds syncing your work to your account — it is never required to use a tool. The full details, including which tools work offline and how your offline work reaches your account, are in Desktop app.

Tips

- You don't need to know which tool you want before you drop a file — DocuFlow works that out from the file itself.
- Dropping a PDF or a supported image always jumps straight to the editor; anything else always shows you a choice of tools first, so you can pick the right one.
- The "Pick up where you left off" row is a shortcut back to a tool you've already used — it's empty until you've used one, then saves you a search the second time.
- On the web you must be signed in to reach the Tools page at all; on desktop the page opens whether or not you've signed in.
- Signing out on desktop is more than logging out of the website — it also clears the app's memory of your offline work for that account, so only sign out there once anything queued has finished syncing (see Desktop app).
- If you drop several files at once and DocuFlow can't find one tool that handles all of them together, try them one at a time instead — most tools are built around a single file or a single kind of file.

1.1. Signing in and out

Signing in

The sign-in screen is titled **Secure workspace access**, with the line "Sign in with your organization account to use document operations and your file library."

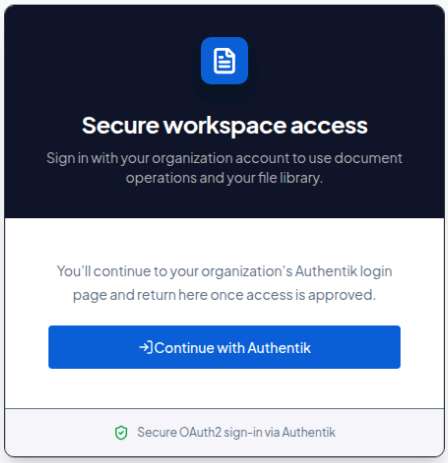

Figure: the sign-in screen.

To sign in:

1. Select **Continue with Authentik**.
2. You are sent to your organisation's own login page — this is the same login your other work accounts already use, not a new DocuFlow-specific one. The screen tells you: "You'll continue to your organization's Authentik login page and return here once access is approved."
3. Sign in there as usual. You are brought back to DocuFlow automatically once access is approved.

While you're being brought back, you'll briefly see "Completing your secure sign-in…" — this is normal and passes on its own.

What you'll see when it's done: you land on the **Tools** page (see Tools), signed in, with your name shown in the account menu in the top right.

> ⚠ **IF SOMETHING GOES WRONG**
>
> - If your previous session simply ran out, you'll see "Your session has expired. Please sign in with Authentik again to continue." — sign in again the same way.
> - If your session stopped being accepted, you'll see "Your session is no longer valid with the Utility Engine. Please sign in with Authentik again." — sign in again.
> - If the sign-in page itself can't be set up, you'll see "Authentik setup required" with a line naming the missing setting — this is something your administrator needs to fix, not something you can work around.
> - If you're sent back after the login page but it didn't finish, you'll see "Sign-in could not be completed" with "Return to the sign-in page and try again." — select **Return to sign in** and try once more.

Note that DocuFlow itself never asks you to type a password — that only happens on your organisation's own login page in step 2. If a screen asking for a DocuFlow-specific password ever appears, it isn't part of this flow.

Signing in is the same process everywhere DocuFlow asks for it — the web app's sign-in page and, if you choose to sign in there, the desktop app's sign-in button both take you through the same organisation login page and the same steps above.

Signing out

Your account menu, in the top right, has a **Log out** button.

To sign out: select **Log out**.

What you'll see when it's done: you are returned to the sign-in page. On desktop, signing out also forgets your offline workspace — the app no longer has access to the files and changes you had queued for that account until you sign in again as the same person.

This is different from your session simply expiring while you're away (see the notices under Signing in): selecting **Log out** is a deliberate action, and only a deliberate log-out on desktop forgets the offline workspace. A session that expires on its own leaves your offline work in place, ready to pick up once you sign in again.

1.2. Tools

The **Tools** page is what opens right after you sign in (or, on desktop, right when you open the app). Its heading is "Tools", with the line "Your private utility desk for everyday document work."

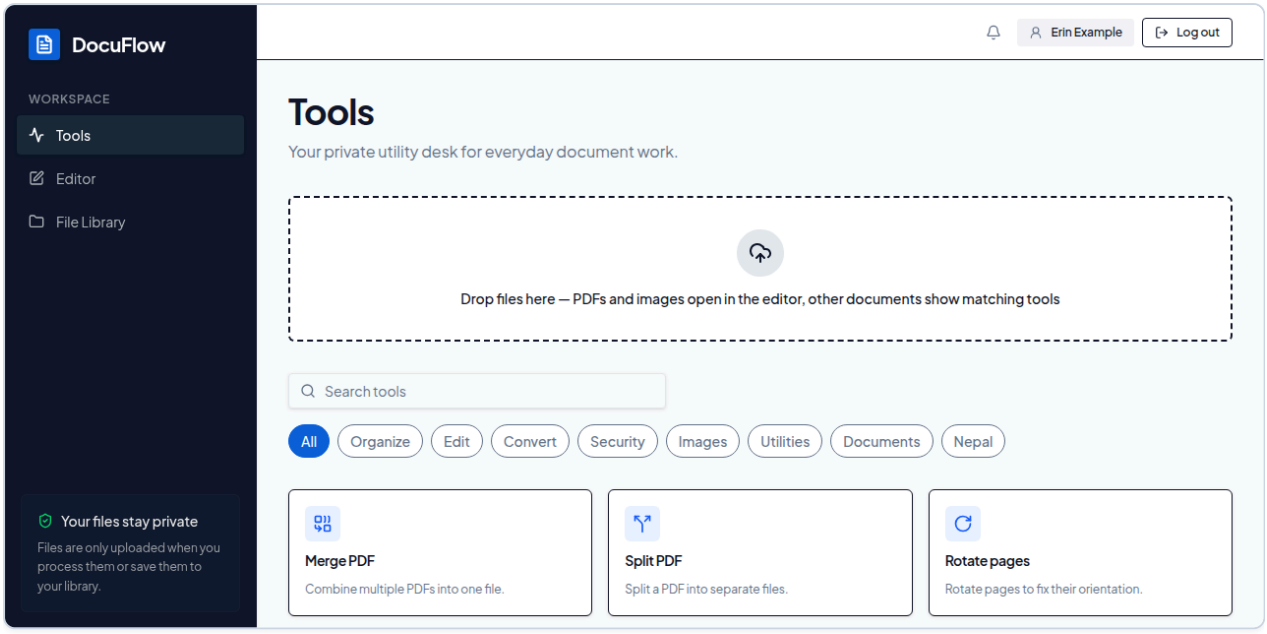

Figure: the Tools page — every tool DocuFlow offers, in one searchable catalogue.

To start work on a file:

1. Drop your file onto the drop zone in the middle of the page — it reads "Drop files here — PDFs and images open in the editor, other documents show matching tools."
2. If your file is a PDF or an image the editor can open, you go straight into the editor, ready to work on it — no extra step.
3. For any other kind of file DocuFlow recognises (a Word document, an HTML page, and so on), a panel appears headed with your file's name and the line **Tools that can take this drop:**, with one button per tool that can handle it. Select the one you want.

What you'll see when it's done: the tool you chose opens with your file already loaded — you do not have to upload it again or hunt for an "open file" option inside the tool. This is what "the tool opens ready for your file" means throughout DocuFlow: picking a tool from a drop, or from the matching-tools panel, never leaves you back at an empty screen with your file to find again.

⚠ IF SOMETHING GOES WRONG

- If none of DocuFlow's tools can take your file at all, you'll see a toast: "DocuFlow has no tool for that file type."
- If several files were dropped together and no single tool can take all of them as one job, the panel says "No single tool takes all of these files together — try one type at a time."
- You can dismiss the matching-tools panel at any time with its **Dismiss** button, without picking a tool.

Finding a tool without a file

You don't have to start from a file. The Tools page has a search box (placeholder "Search tools") and a row of category tabs above the tool grid:

Tab
All
Organize
Edit
Convert
Security
Images
Utilities
Documents
Nepal

Tools you've used recently appear as a row of small "Pick up where you left off" pills near the top, so the tool you reach for most often is usually only a glance away.

To find a tool:

1. Type into the search box, or select a category tab.
2. Select the tool's card to open it. It is then ready for you to add or drop your file inside it.

Whichever way you arrive at a tool — a drop, a search, or a category tab — it opens ready for your file; you never have to look for a separate "open file" step once you're inside.

What you'll see when it's done: the tool's own page opens, with its file-picker or drop area waiting for your file (or, for tools that already had your file from a drop, ready to work on it immediately).

> **⚠ IF SOMETHING GOES WRONG**
>
> If nothing matches what you typed, the page shows "No tools match "`<what you typed>`"" — try a shorter or different word, or clear the search box and browse the category tabs instead.

You don't need to remember a tool's exact name to find it — a close guess, or the plain-language task it does ("compress", "watermark", "sign"), is usually enough. The **All** tab shows every tool at once; reach for the other category tabs, or the search box, once you know roughly what kind of task you're doing.

2. Organise PDFs

These tools organise the pages inside a PDF — combine files, split them apart, fix their order, cut out or add pages, shrink the file, or lay it out for printing. Anyone who has a PDF to tidy up before sharing it uses them.

Before you start

- You need a PDF file saved somewhere you can pick it from — your device, or your library.
- On the web app you must be signed in with your organisation's account. The desktop app works with these tools before you sign in.
- **Merge PDF**, **Split PDF**, **Rotate pages**, **Rearrange pages**, **Delete pages**, **Extract pages**, **Add blank pages**, **N-up layout** and **Booklet** open inside the full editor. **Compress PDF** and **Add page numbers** open their own page instead. All eleven are reached from the tools list — search for the tool by name, or open the **Organize** tab.
- Dropping a PDF straight onto the home page opens the plain editor, without any of these tools' presets switched on — to get a tool's guided steps, open it from the tools list first.

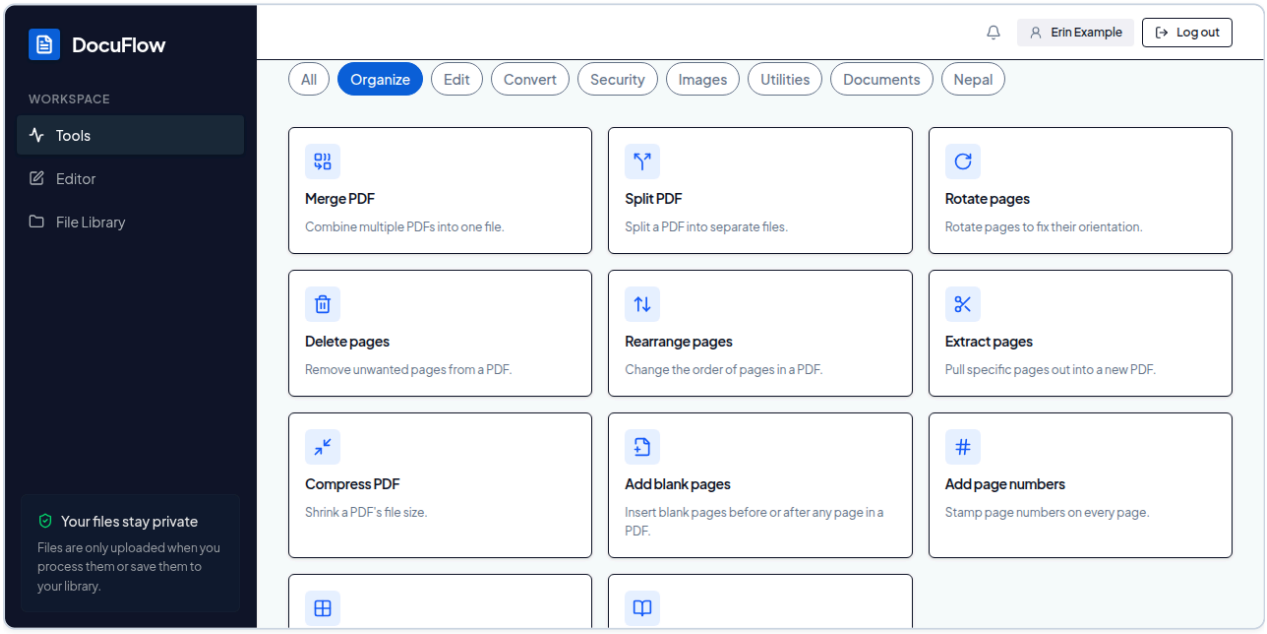

Figure: the Organize tab — all eleven page-organising tools in one place.

Tips

- Every one of these tools shows its effect on the page list or canvas before you export — nothing is guessed or hidden until the file downloads.
- **Undo**, in the editor's top bar, reverses the last page change — a rotate, delete, insert or reorder — so it's safe to try something and back out.

- Drop a file DocuFlow doesn't expect anywhere in these tools, and it says: "DocuFlow needs a PDF file here."
- **Compress PDF** and **Add page numbers** open their own dedicated page from the tools list; the other nine tools here open inside the full editor, where you can turn on more than one change before you export.
- With more than one document open in the editor, tick **Export all documents** in the Export dialog to run the enabled changes on every open document at once.
- On the desktop app, **Compress PDF** works without an internet connection; **Add page numbers** does not.

2.1. Merge PDF

Combine multiple PDFs into one file.

To combine PDFs into one file:

1. Open **Merge PDF** from the tools list.
2. Drop your first PDF.
3. A message above the pages reads "Add the other PDFs you want to combine — they join this one in order, and you can drag pages to reorder." Click **Add files** (or **From library**) to bring in the rest.
4. Drag pages in the page list into the order you want.
5. Click **Export**.

What you'll see when it's done: every PDF you added shows together as one document, in the order they'll be combined, as soon as you add them — before you export anything. With nothing else turned on, the Export button reads **Download PDF** (**Save PDF** on the desktop app); once it finishes, the file is listed with its own **Download** button.

> ⚠ **IF SOMETHING GOES WRONG**
>
> Combining pages doesn't need the online engine, so there's nothing specific to this step — errors only appear if you also turn on another step (see The editor for those sentences).

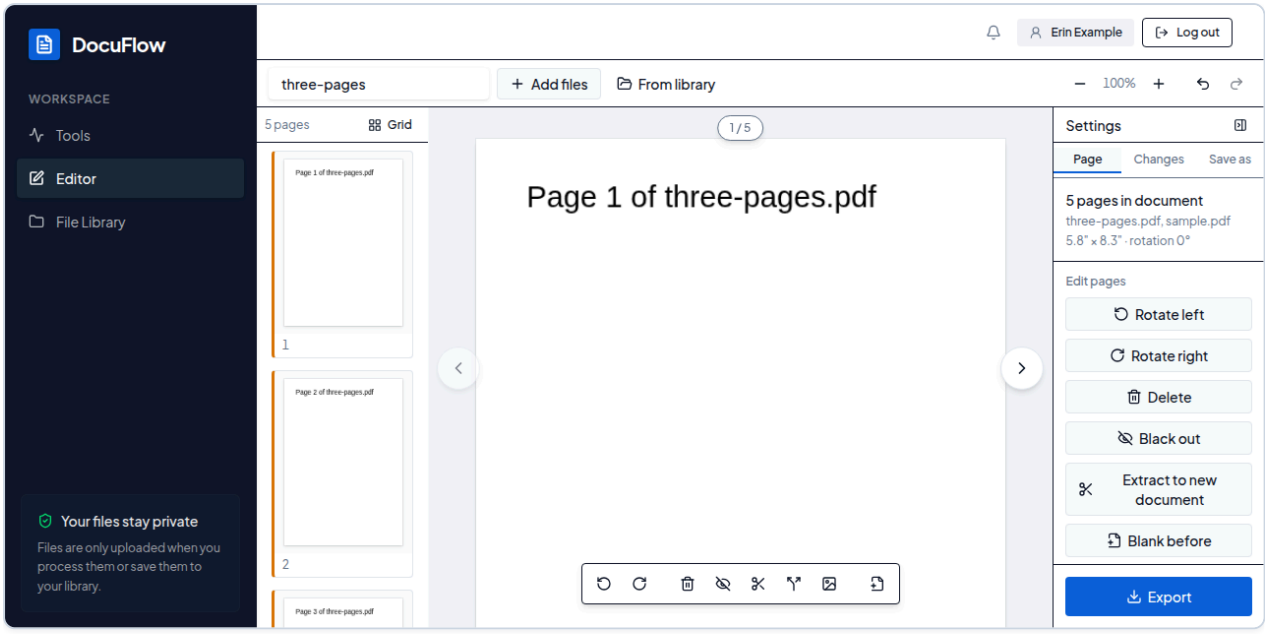

Figure: pages from both files, already combined into one document, before anything is exported.

2.2. Split PDF

Split a PDF into separate files.

To split a PDF into separate files:

1. Open **Split PDF** from the tools list.
2. Drop your PDF — the **Split PDF** dialog opens.
3. Choose a mode: **Page ranges** ("One file per range"), **Every N pages** ("Equal chunks"), or **Every page** ("One file per page").
4. For **Page ranges**, type the ranges into **Ranges** (e.g. "1–3, 4–6, 7") — separate files with commas. For **Every N pages**, type a number into **Pages per file**.
5. Click **Split into `<n>` files**.

What you'll see when it's done: a summary above the button reads e.g. "Makes 3 files: pages 1–4 · 5–9 · 10–12" (or "one per page"); each part is a clickable page number that shows that page on the canvas, and any page a ranges spec leaves out is listed as "Not included: pages …". With more than one file they download together as one .zip; with a single file, it downloads (or saves, on desktop) on its own, and the dialog shows "`<name>` downloaded." with a **Download again** button.

> **⚠ IF SOMETHING GOES WRONG**
>
> A ranges value DocuFlow can't read shows its problem under the **Ranges** field. "Splitting needs the online engine, which is unreachable right now." appears if the connection drops.

2.3. Rotate pages

Rotate pages to fix their orientation.

To rotate pages:

1. Open **Rotate pages** from the tools list.
2. Drop your PDF. A message above the pages reads "Select the pages to rotate — click, Shift-click or Ctrl-click them in the page list — then rotate them."
3. Click a page to select it — Shift-click or Ctrl-click to select more, or click **Select all pages**.
4. Click **Rotate left** or **Rotate right**.
5. Click **Export**.

What you'll see when it's done: the page list and canvas show every page already turned before you export. With nothing else turned on, the Export button reads **Download PDF** (**Save PDF** on desktop).

> ⚠ **IF SOMETHING GOES WRONG**
>
> Nothing specific to rotating — if you rotate the wrong page, use **Undo** in the top bar.

2.4. Rearrange pages

Change the order of pages in a PDF.

To change the order of pages:

1. Open **Rearrange pages** from the tools list.
2. Drop your PDF — the page list switches to a grid so you can see every page at once. A message reads "Drag pages into the order you want, or focus a page, press Space and move it with the arrow keys." (On a phone: "Tap a page, then use "Move to…" to put it where you want it.")
3. Drag a page to its new position (or use the keyboard method above; on a phone, tap a page and use **Move to…**).
4. Click **Export**.

What you'll see when it's done: pages appear in their new order in the grid and the canvas as soon as you move them.

> ⚠ **IF SOMETHING GOES WRONG**
>
> Nothing specific — **Undo** in the top bar reverses a move.

2.5. Delete pages

Remove unwanted pages from a PDF.

To remove pages:

1. Open **Delete pages** from the tools list.
2. Drop your PDF. A message reads "Select the pages you don't need, then delete them. Undo brings them back."
3. Select the pages you don't need (click, Shift-click or Ctrl-click).
4. Click **Delete page** (or **Delete** `<n>` **pages**, in the top bar or the hint above the pages).
5. Click **Export**.

What you'll see when it's done: the deleted pages disappear from the page list immediately.

> ⚠ **IF SOMETHING GOES WRONG**
>
> Deleted the wrong page? Click **Undo** in the top bar — it brings them back, as the hint promises.

2.6. Extract pages

Pull specific pages out into a new PDF.

To pull pages out into a new PDF:

1. Open **Extract pages** from the tools list.
2. Drop your PDF — the **Extract to new document** dialog opens: "Click the pages you want to take out. They move into a new document here in the editor."
3. Click the pages you want in the page grid, or type their numbers into **Pages** (e.g. "1–3, 5"). Use **Select all** or **Clear** as needed.
4. Optional: change **New document name**; tick **Split into several documents** and set a pages-per-document count to make more than one new file instead of one.
5. Click the confirm button — named after the job, e.g. **Make 3 documents** or **Extract 2 pages**.

What you'll see when it's done: while the dialog is open, the page grid rings every page that's leaving and dims the ones that stay, and a summary reads e.g. "Makes 3 documents" or "Takes 2 pages into a new document", with what the source keeps noted underneath (e.g. "2 pages stay in this document", or "This document will be left empty"). Once you confirm, the extracted pages open as a new document tab; a message says where they went (e.g. "Extracted 2 pages to Extract 1") with a **Back to** `<source>` button. If you took every page, the source document shows "`<name>` has no pages left".

> **⚠ IF SOMETHING GOES WRONG**
>
> With nothing picked yet, the strip reads "Click the pages you want to take out, or type their numbers above." and the confirm button is disabled. If you type a page number the document doesn't have, DocuFlow explains the problem under the **Pages** box and keeps the confirm button disabled until it's fixed.

2.7. Add blank pages

Insert blank pages before or after any page in a PDF.

To insert a blank page:

1. Open **Add blank pages** from the tools list.
2. Drop your PDF. A message reads "Pick a page, then add a blank page before or after it."
3. Click the page you want to insert next to.
4. Click **Blank page before** or **Blank page after** (in the hint above the pages, or in the page toolbar's **Insert blank page** menu, or the **Page** tab's **Blank before / Blank after** buttons).
5. Click **Export**.

What you'll see when it's done: the new page appears as a plain white page right where you put it, sized to match its neighbour.

> **⚠ IF SOMETHING GOES WRONG**
>
> Nothing specific — **Undo** removes the blank page again. A blank page can't later be opened with "Edit as image", since it has no picture to edit.

2.8. Compress PDF

Shrink a PDF's file size.

To shrink a PDF's file size:

1. Open **Compress PDF** from the tools list.
2. Drop your PDF (or **Choose files / From library**) — you can add more than one and add more with **Add more**.
3. Above the page, DocuFlow reads the file and says what compression will do to it: "No images found — this PDF is mostly text, so compression won't change much", or "Images on `<n>` of the first `<m>` pages — those are where the savings come from."
4. Choose **Compression**: **Smaller file** ("Smallest size; images may look softer."), **Balanced** ("A good size with images that still look good."), or **Best quality** ("Keeps images sharp; the file shrinks less.").

5. Click **Compress PDF** (or **Compress** `<n>` **PDFs**).

What you'll see when it's done: each finished file's row shows its size before and after, with **Download**, **Download all (.zip)** when there's more than one, **Save to library**, **Open in editor** for a single file, and **Start over**.

> ⚠ **IF SOMETHING GOES WRONG**
>
> Nothing specific to Compress — a wrong file type dropped here shows "DocuFlow needs a PDF file here."

2.9. Add page numbers

Stamp page numbers on every page.

To stamp page numbers on every page:

1. Open **Add page numbers** from the tools list.
2. Drop your PDF (or PDFs).
3. Choose **Position** on the 6-cell grid (top left, top centre, top right, bottom left, bottom centre, bottom right).
4. Choose **Number style**: **1**, **Page 1**, **1 of 3**, **Page 1 of 3**, or type your own under **Custom** ("Type your own: %p is the page number, %P the total pages.").
5. Under **More options**: **Number from page** `[n]` **to page** `[m]` ("Leave "to page" empty to number up to the last page."), **Start counting at** (default 1), and **Text size**.
6. Click **Add page numbers** (or **Add page numbers to** `<n>` **PDFs**).

What you'll see when it's done: the previewed page updates live as you change the options, showing the actual number in the position and style you chose. Once run, the finished file is listed with a **Download** button.

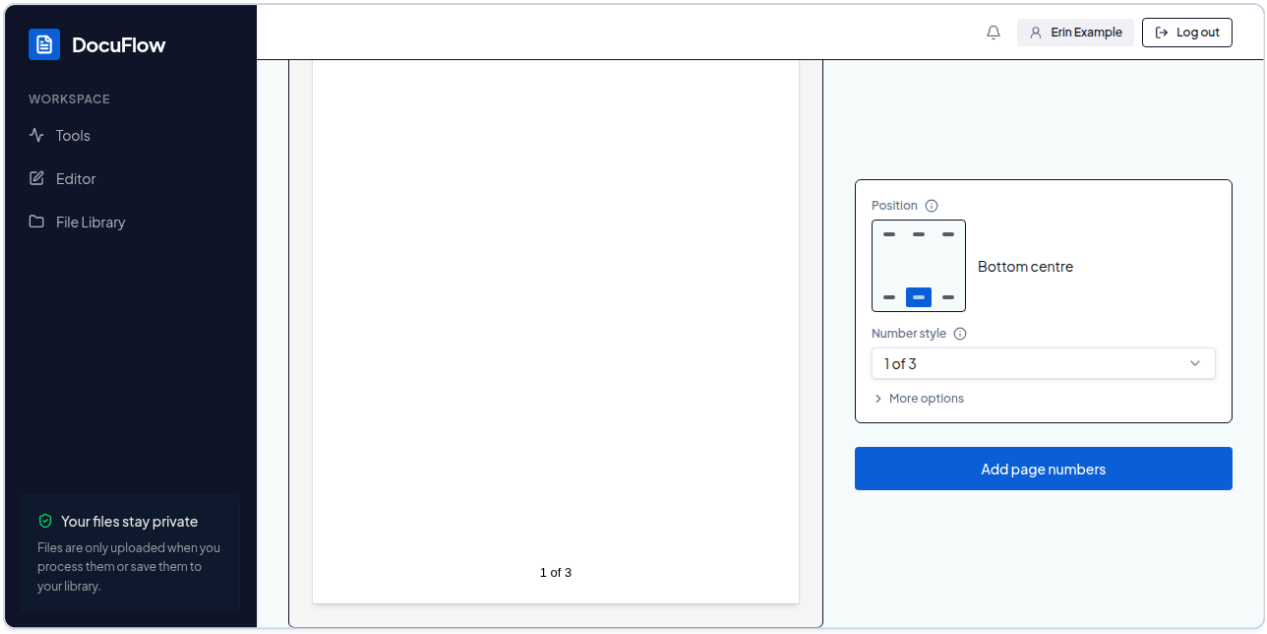

Figure: the page number shown on the page before anything is run.

> **⚠ IF SOMETHING GOES WRONG**
>
> "The 'to' page must be a whole number of 1 or more"; "The 'to' page can't come before the 'from' page"; "This PDF has only 1 page" (or "This PDF has `<n>` pages — choose a page from 1 to `<n>`") if your range doesn't fit the document. On the desktop app, offline, the button is disabled with "Needs an internet connection to add page numbers PDFs."

2.10. N-up layout

Lay multiple pages out on each printed sheet.

To lay several pages out on each printed sheet:

1. Open **N-up layout** from the tools list.
2. Drop your PDF — the editor opens on the **Changes** tab with **Page layout** already turned on, "Pages per sheet" selected.
3. Choose **Pages per sheet** (2, 4, 6, 9 or 16), **Sheet orientation** (Portrait (tall) or Landscape (wide)), and optionally tick **Draw a border around each page**.
4. Click **Export**.

What you'll see when it's done: a line above the layout reads e.g. "Puts 4 pages on each sheet — 12 pages become 3 sheets.", and the canvas shows the sheets laid out as they'll print. With nothing else turned on, Export reads **Arrange pages & download** (**& save** on desktop).

> **⚠ IF SOMETHING GOES WRONG**
>
> Nothing specific to this step.

2.11. Booklet

Impose pages as a foldable booklet.

To lay pages out as a foldable booklet:

1. Open **Booklet** from the tools list.
2. Drop your PDF — the editor opens on the **Changes** tab with **Page layout** already turned on, "Booklet" selected.
3. Choose **Paper size** (A4 or US Letter) and **Fold along** (Left edge (like a book) or Top edge (like a calendar)).
4. Click **Export**.

What you'll see when it's done: a line above the layout reads e.g. "Arranges the pages as a booklet, 4 to a side — 12 pages become 3 sheets, printed on both sides, with 4 blank pages added at the end." (the blank-pages part only shows when padding was needed), and the canvas shows the folded, double-sided layout. With nothing else turned on, Export reads **Make booklet & download** (**& save** on desktop).

> ⚠ **IF SOMETHING GOES WRONG**
>
> Nothing specific to this step.

3. Edit PDFs

These tools change what's on the page itself — stamp a watermark or a signature, black out sensitive content, fill in a form, or edit a page like a picture. Most open inside DocuFlow's full editor.

Before you start

- You need a PDF to work on — for **Edit as image**, a PDF page already open in the editor, or an image.
- On the web app you must be signed in with your organisation's account. The desktop app works with **Add watermark** before you sign in; the others need an internet connection either way (see each tool below).
- **Add watermark** and **Sign PDF** open their own page from the tools list; **Black out parts of a PDF** and **Edit as image** open inside the full editor; **Fill PDF forms** opens its own page. All are reached from the tools list — search for the tool by name, or open the **Edit** tab.

Tips

- Every change here previews on the page before you export — nothing is guessed or hidden until the file downloads.
- Changes always run in the same order — Black out, then Page layout, Page numbers, Watermark, Sign, Make text searchable (OCR), Flatten, Remove hidden data, Document details, Compress, Password — whatever order you turned them on in.
- With two or more documents open, tick **Export all documents** to run every open document's enabled changes at once.
- **Add watermark** and **Sign PDF** work as their own page for a quick, one-change job, or as steps inside the full editor when you want to combine them with other changes — use **Open in full editor** to get there.
- **Sanitize PDF**, not **Black out parts of a PDF**, is what removes a file's title, author and other saved details.
- On the desktop app, **Add watermark** works offline; **Sign PDF** needs an internet connection.

3.1. The editor

Every PDF you open for editing — by dropping it on the home page, or through one of these tools — lands in the same editor, with the page you're working on shown large in the middle and a panel called **Settings** beside it.

The page canvas

Below the page, a toolbar offers the page actions: **Rotate left**, **Rotate right**, **Delete**, **Black out**, **Extract to new document**, **Split PDF**, **Edit as image**, and **Insert blank page** (with **Before** / **After**). Black out is the one action that isn't a one-off: clicking it turns on the drawing tool (see Black out parts of a PDF) — a strip appears under the toolbar with a live count, **Clear all** and **Done**. Round arrow buttons at the left and right edges of the canvas step to the previous/next page (dimmed once you're at the first or last page), with a "current / total" label above the page telling you where you are.

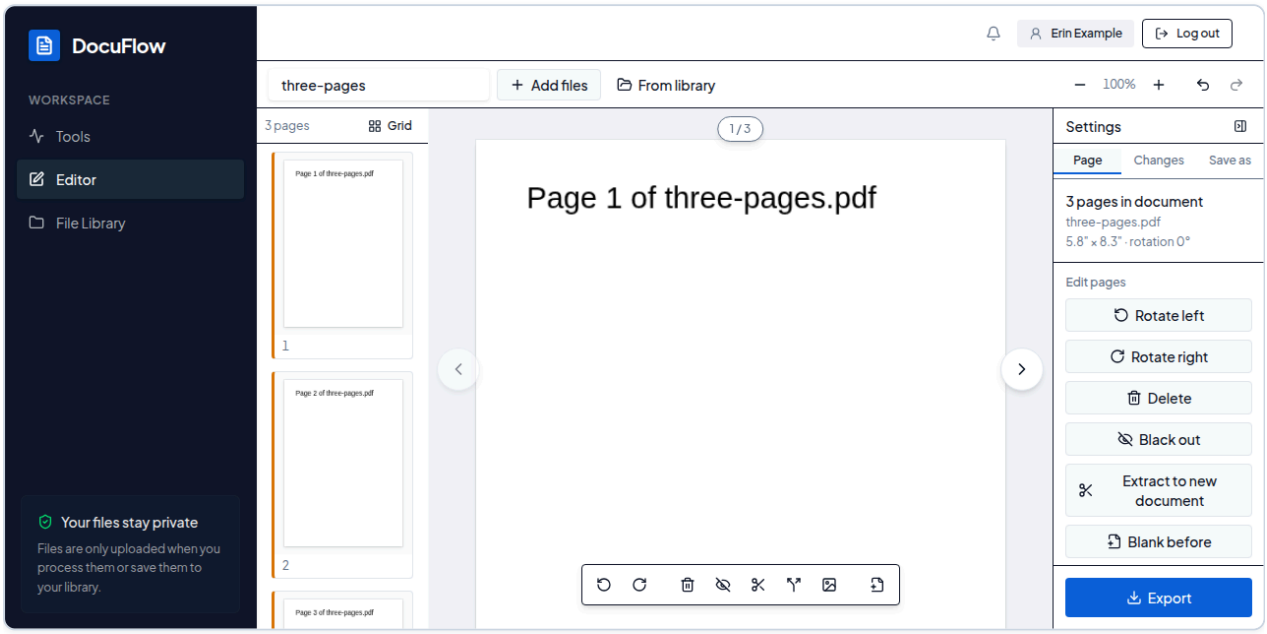

Figure: the page canvas and its toolbar of page actions.

The Settings panel

Settings has three tabs:

- **Page** — a summary of the pages you've selected, plus the same "Edit pages" actions as the canvas toolbar, in the same order: **Rotate left**, **Rotate right**, **Delete**, **Black out**, **Extract to new document**, **Blank before**, **Blank after**, and **Split into separate PDFs**.
- **Changes** — an **Add a change** button opens a menu of every change you can make; picking one adds a card for it, with its title and its options right there — nothing to expand, nothing to turn on separately. Each card has a small **×** to remove it. (Black out isn't in this menu — it's the toolbar button above, since it's drawn on the page rather than configured in a form.) Whichever ones you add always run in this fixed order, no matter which order you added them in:
  1. **Page layout** — "Print several pages on one sheet, or as a folded booklet."
  2. **Page numbers** — "Add a number to every page."
  3. **Watermark** — "Stamp text or an image across every page."
  4. **Sign** — "Place your signature image on a page."

5. **Make text searchable (OCR)** — "Recognise the text in scanned pages so it can be searched and copied."
6. **Flatten** — "Lock form fields and comments into the page so they can't be changed."
7. **Remove hidden data** — "Strip details, attachments, scripts or links you may not want to share."
8. **Document details** — "Set the title, author and keywords saved inside the file."
9. **Compress** — "Make the file smaller."
10. **Password** — "Require a password to open the PDF."

    Black out, when turned on from the toolbar, still runs first, ahead of all of these. With nothing added yet, the tab reads "Nothing changes yet — add a change above to see it on the page."

- **Save as** — choose what the file comes out as: **PDF**, **Images** or **Text**.

Document tabs

With two or more documents open, a row of tabs sits under the top bar, one per document, each showing its page count as a pill ("1 page" / "`<n>` pages"). Left, Right, Home and End switch between them.

The Export dialog

Click **Export** to open it. The primary button is named after the work: with exactly one change turned on it reads "`<that change>` & download" (e.g. **Black out & download**, **Add watermark & download**, **Compress & download**, **Add page numbers & download**, **Sign & download**, **Make searchable & download**, **Flatten & download**, **Clean & download**, **Set details & download**, **Protect & download**); with none turned on it reads **Download PDF**; with several it reads **Export PDF** (each reads "save" instead of "download" on the desktop app). A checkbox offers **Also save to my library**; with two or more documents open, a second checkbox offers **Export all documents**.

What Export checks before it lets you run it — a problem opens the Settings panel to the field itself, so you rarely see these as a blocked dialog, but they're the exact sentences:

- "Enter a password (at least 4 characters) to protect your PDF"
- "Add watermark text or choose an image"
- "Choose a signature image"
- "Fill in at least one document detail, such as the title"
- "Draw at least one area to black out"
- "The 'to' page must be a whole number of 1 or more"
- "The 'to' page can't come before the 'from' page"
- "This PDF has only 1 page" (or "This PDF has `<n>` pages — choose a page from 1 to `<n>`")

While it runs, one plain sentence shows at a time, over a progress bar with no percentage: "Preparing your PDF…", "Blacking out areas…", "Arranging pages…", "Adding page numbers…",

"Adding the watermark…", "Signing…", "Making text searchable…", "Flattening…", "Removing hidden data…", "Setting document details…", "Compressing…", "Protecting…", "Converting…", "Finishing…"

When it's done, each document gets a row with its name and size (before → after, when Compress, Flatten or Sanitize ran), a **Download** button, **Download all (.zip)** with more than one document, **Save to library** (unless the checkbox already did it), and **Start over**. A failed row offers **Try again**, and — depending on what failed — **Export without this step** or **Download it anyway** (**Save it anyway** on desktop).

3.2. Add watermark

Stamp text or a logo onto every page.

To stamp a watermark onto every page:

1. Open **Add watermark** from the tools list.
2. Drop your PDF (or **Choose files** / **From library**) — add more with **Add more**.
3. Type your text into **Watermark text** (placeholder "e.g. CONFIDENTIAL"), or attach a **Watermark image (optional)**.
4. Adjust **Opacity** — lower is fainter.
5. Under **More options**: **Text size** ("In points. Leave empty to fit the page.").
6. Click **Add watermark** (or **Add watermark to** `<n>` **PDFs**).

What you'll see when it's done: the watermark is drawn over the page exactly as it will look, live as you type or move the sliders — before you run anything. Once run, each file's row offers **Download**, **Save to library**, **Open in editor** for one file, and **Start over**.

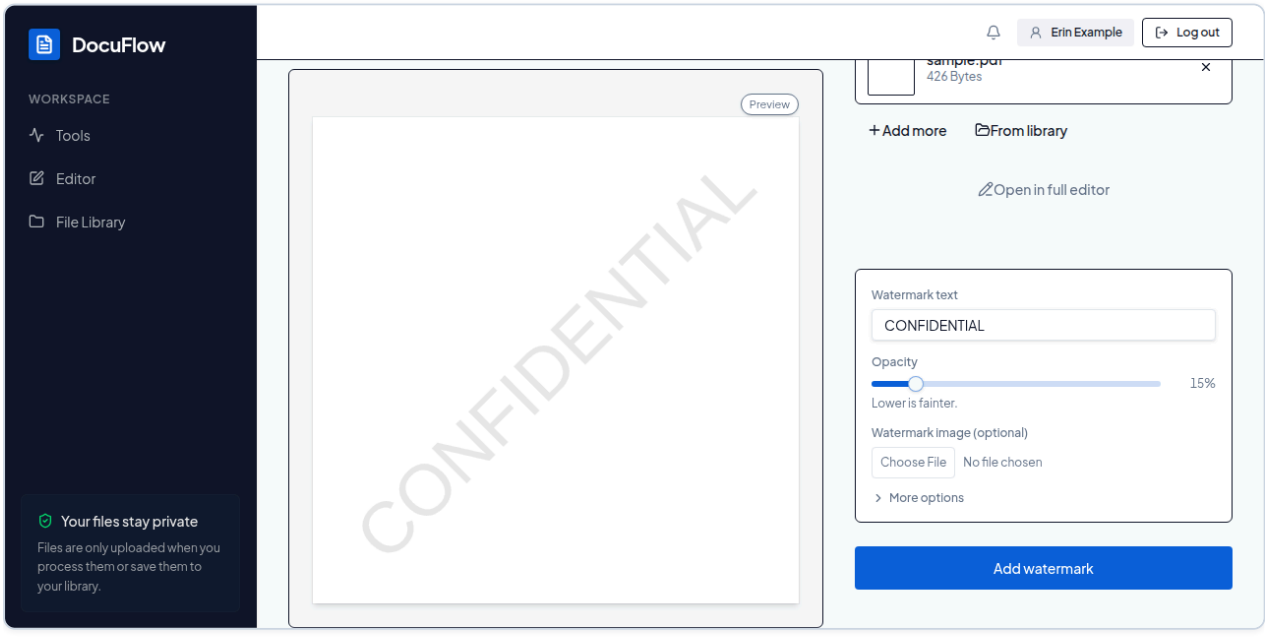

Figure: the watermark, shown exactly as it will look, as soon as it's typed.

> **⚠ IF SOMETHING GOES WRONG**
>
> "Add watermark text or choose an image" if you've set neither. Add watermark works without an internet connection on the desktop app.

To combine a watermark with other changes on the same file in one export, click **Open in full editor** below the file instead of running this page on its own — that opens the same **Watermark** step inside the full editor's **Changes** tab.

3.3. Sign PDF

Stamp a signature image onto selected pages.

To stamp your signature onto a PDF:

1. Open **Sign PDF** from the tools list.
2. Drop your PDF.
3. Attach your **Signature image** ("A PNG with a transparent background looks best.").
4. Type which pages to sign into **Pages to sign** (placeholder "Last page").
5. Under **More options**: **Distance from left edge**, **Distance from bottom edge**, **Signature width** ("As a share of the page width."), **Opacity**.
6. Click **Sign PDF**.

What you'll see when it's done: the signature is drawn over the page exactly where and how big it will be, live as you change the position or size. Once run, each file's row offers **Download**, **Save to library**, **Open in editor**, and **Start over**.

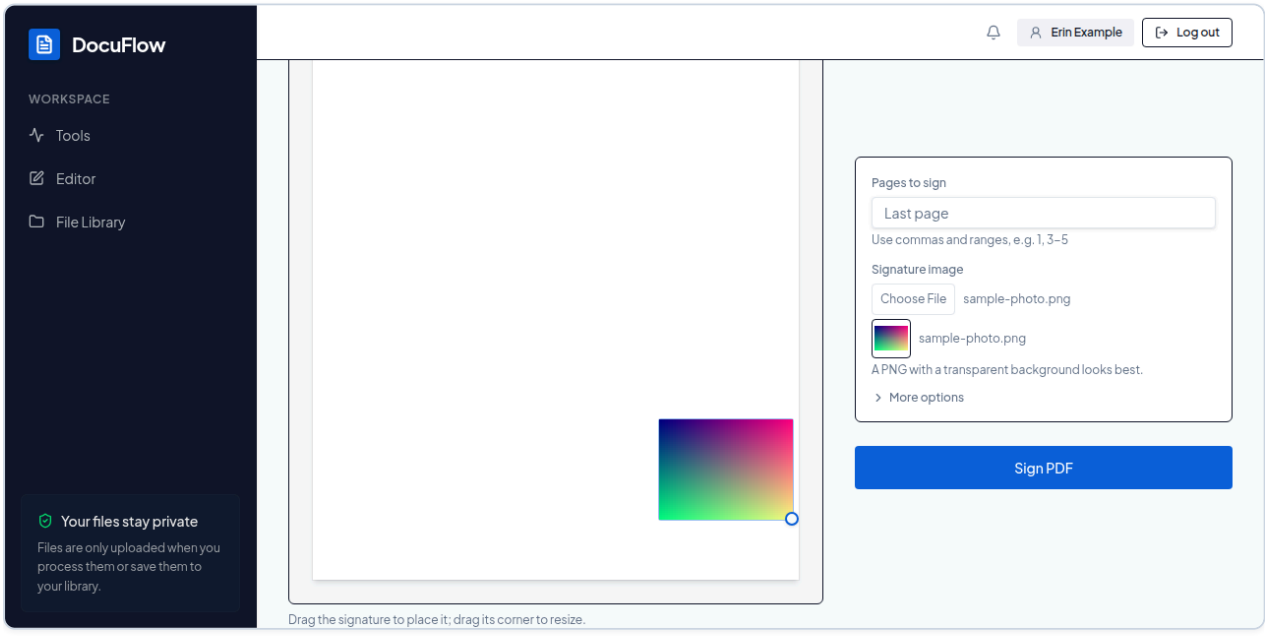

Figure: the signature shown on the page before Sign PDF is run.

> ⚠ **IF SOMETHING GOES WRONG**
>
> "Choose a signature image" if none is attached. Sign PDF needs an internet connection; on the desktop app, offline, the button is disabled with "Needs an internet connection to sign PDFs."

3.4. Black out parts of a PDF

Remove text or pictures from a PDF — blacked out or blurred.

To black out or blur part of a PDF:

1. Open **Black out parts of a PDF** from the tools list — the editor opens with **Black out** already turned on, ready to draw. (You can also click **Black out** in the page toolbar below the canvas at any time.)
2. Drop your PDF.
3. Drag a box on the page over what you want to remove. A note above the page reads: "Anything you cover is removed from the file, not just hidden."
4. With a box selected, click **Black** or **Blurred** to choose how it looks (**Black** is the default for a new box).
5. Draw as many boxes as you need, on any page. A strip under the toolbar shows how many you've drawn, with **Clear all** to remove every box at once and **Done** when you're finished. Click a box's × to remove just that one.
6. Click **Export**.

What you'll see when it's done: boxes are drawn on the page as you make them — solid black or softly blurred, matching what you chose — so you see exactly what will disappear before you export. With only Black out turned on, Export reads **Black out & download** (**& save** on desktop).

> ⚠ **IF SOMETHING GOES WRONG**
>
> "Draw at least one area to black out" if you try to export with nothing drawn.

The strip's ⓘ button also states the limits plainly: "Only what's inside the boxes is removed — text that runs outside them stays." and "Details saved with the file — like its title or author — aren't part of this. Use Sanitize PDF for those." — Black out removes content from the page; it doesn't touch the file's saved title, author or other document details. For those, use **Sanitize PDF**.

3.5. Fill PDF forms

Fill in a PDF's form fields and save the result.

To fill in a PDF's form fields:

1. Open **Fill PDF forms** from the tools list.
2. Drop your PDF, or **Choose files** / **From library**.
3. The page appears with its fields outlined — you can fill them in right there, before running anything.
4. Click **Read form fields**.
5. DocuFlow reads the fields: "Loading form fields…", then either "This PDF has no form fields." or one control per field — a real checkbox for checkbox fields, a text box for every other type — already carrying what you typed on the preview.
6. Tick **Flatten** if you want the values locked into the page so they can't be edited again.
7. Click **Fill form** (busy: "Filling…").
8. Click **Download** `<filename>`.

What you'll see when it's done: the filled file is offered as a download button named after it.

> ⚠ **IF SOMETHING GOES WRONG**
>
> "This PDF has no form fields." if there's nothing to fill in; otherwise, a failed fill shows the engine's own message under the button.

List-box fields aren't fillable here yet: a list-box shows as a plain text box, but typing into it doesn't change the file's real list-box value. Every other field type — text, checkboxes and the rest — fills in and saves normally.

3.6. Edit as image

Edit a PDF page like an image.

To edit a page like an image:

1. With a PDF page open in the editor, click **Edit as image** in the page toolbar under the page (or open **Edit as image** from the tools list, which opens the editor on that page directly).
2. A note reads "This page becomes an image."
3. Edit the page with the image tools — crop, resize, black out or blur an area, rotate, convert, or remove its background.
4. Click **Apply** to put the edited image back onto the page, or close the image editor to leave it unchanged.
5. Click **Export** once you're done with the document.

What you'll see when it's done: the page in the editor updates immediately to your edited image.

⚠ IF SOMETHING GOES WRONG

Nothing specific to this tool. A blank page (from **Add blank pages**) can't be edited as an image, since it has no picture to start from.

4. Convert

These tools turn a document from one format into another — Office files to PDF, a PDF to Word, Excel or PowerPoint, images, text, Markdown or HTML, a web page to PDF, and scanned PDFs into searchable ones. Each opens as its own page: drop a file (or, for one tool, type a web address), set the few options it needs, and press the one button.

Before you start

You need a file of the right type for the tool you're using. **Word/Excel/PowerPoint to PDF** runs through LibreOffice on the engine and can take a little while for large documents. **PDF to Word** is best effort — the page says so plainly: "Best effort — layout may differ." **OCR (make searchable)** can run on your device once its language pack is installed; without one, it needs an internet connection.

Tool	Accepts
Word/Excel/PowerPoint to PDF	`.docx` `.doc` `.xlsx` `.xls` `.pptx` `.ppt` `.odt` `.ods` `.odp` `.rtf` `.txt` `.csv` (Office document)
PDF to Word (best effort)	PDF
PDF to Excel (best effort)	PDF
PDF to PowerPoint (best effort)	PDF
PDF to images	PDF
Images to PDF	`.png` `.jpg` `.jpeg` `.webp` `.gif` `.bmp`
PDF to text	PDF
PDF to Markdown	PDF
PDF to HTML	PDF
HTML to PDF	`.html` `.htm`, or a public web address
OCR (make searchable)	PDF

Tips

- **PDF to Word** is best effort by design — for anything you'll need to reformat heavily, it may be quicker to start from the original Office file if you still have it.
- Run **OCR (make searchable)** before **PDF to Word**, **PDF to Excel**, **PDF to PowerPoint**, **PDF to HTML** or **PDF to Markdown** on a scanned document — those converters read the text layer, and a scan has none until OCR adds it.

- **HTML to PDF** only reaches pages on the open internet — an address on a private network or an internal server is refused.
- **PDF to images** hands back a single zip file whenever the PDF has more than one page; a one-page PDF comes back as a single image.
- On **PDF to images**, **PDF to text** or **OCR (make searchable)**, if the page isn't giving you enough control, look for **Open in full editor** under the file — with a single file picked, it hands that file to the full editor with this tool already selected.
- Any converter's automatic preview only happens for files up to 25 MB — a larger file still converts, just from a button instead of the moment you drop it.

4.1. Word/Excel/PowerPoint to PDF

Turns a Word, Excel, PowerPoint, OpenDocument, RTF or text file into a PDF.

To convert an Office file to PDF:

1. Drop your file, or use **Choose file** or **From library**.
2. Files up to 25 MB convert automatically the moment you drop them — no button needed. Over 25 MB, the preview shows the file's type and size and a note: "Layout may shift slightly in conversion", plus "Files over 25 MB convert when you press the button."; select **Convert to PDF** to run it.

What you'll see: under the cap, the converted PDF appears right on the page — every page, scroll to see them all. The button reads **Download** `<file>.pdf` (**Save** `<file>.pdf` on desktop); selecting it delivers the exact bytes you just saw, no second wait. Over the cap, there's no on-page preview either before or after conversion — just the file's details and, once you convert, the download button. Either way, the page reminds you: "Conversions run through LibreOffice on the engine and can take a little while for large documents." A **Save to library** checkbox (off by default) keeps the converted PDF in your File Library too, alongside the download. Once the PDF is ready, an **Open in editor** button lets you fix a page in the full PDF editor right away, starting from the exact file you just previewed.

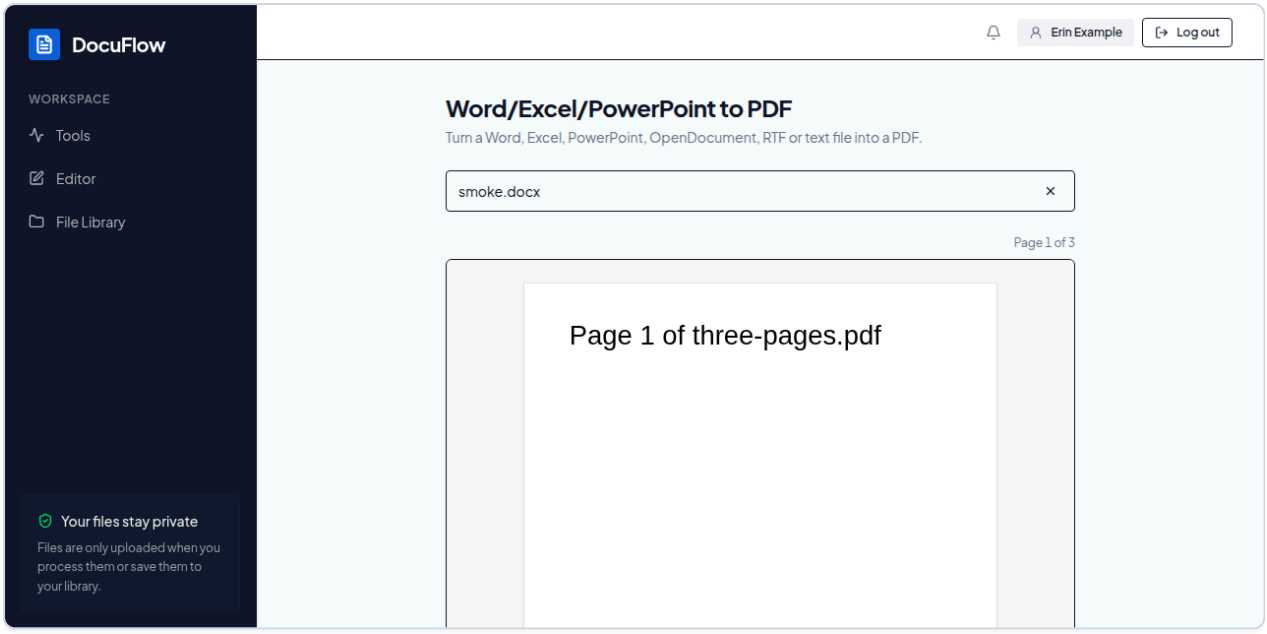

Figure: the Office file, already converted and previewed, before it's downloaded.

> **⚠ IF SOMETHING GOES WRONG**
>
> The reason appears under the button. If ticking **Save to library** fails, you'll see "Couldn't save to the library — the download still worked." — the download itself already succeeded.

4.2. PDF to Word (best effort)

Turns a PDF into an editable Word document. The page states plainly: **"Best effort — layout may differ."**

To convert a PDF to Word:

1. Drop your PDF, or use **Choose file** or **From library**.
2. Files up to 25 MB convert automatically; over that, select **Convert to Word**.

What you'll see: under the cap, the page previews what the Word file will look like once converted — it's rendered back to a PDF automatically so you can check it before you rely on it — while the **Download** `<file>.docx` button is ready right away. If that rendered preview itself can't be built, you'll see "Preview isn't available for this file — the download still works." Pick a scanned PDF (no text layer) and you'll see "This looks scanned — run OCR first for editable text" the instant you pick it, in the preview area — over 25 MB the same warning appears in the file's info card instead, which also always notes "Layout may shift slightly in conversion." Either way, run **OCR (make searchable)** first; converting a scan anyway ends with the engine's own "This PDF has no text to convert. Run OCR (make text searchable) first." A **Save to library** checkbox (off by default) keeps the converted Word file in your File Library too, alongside the download.

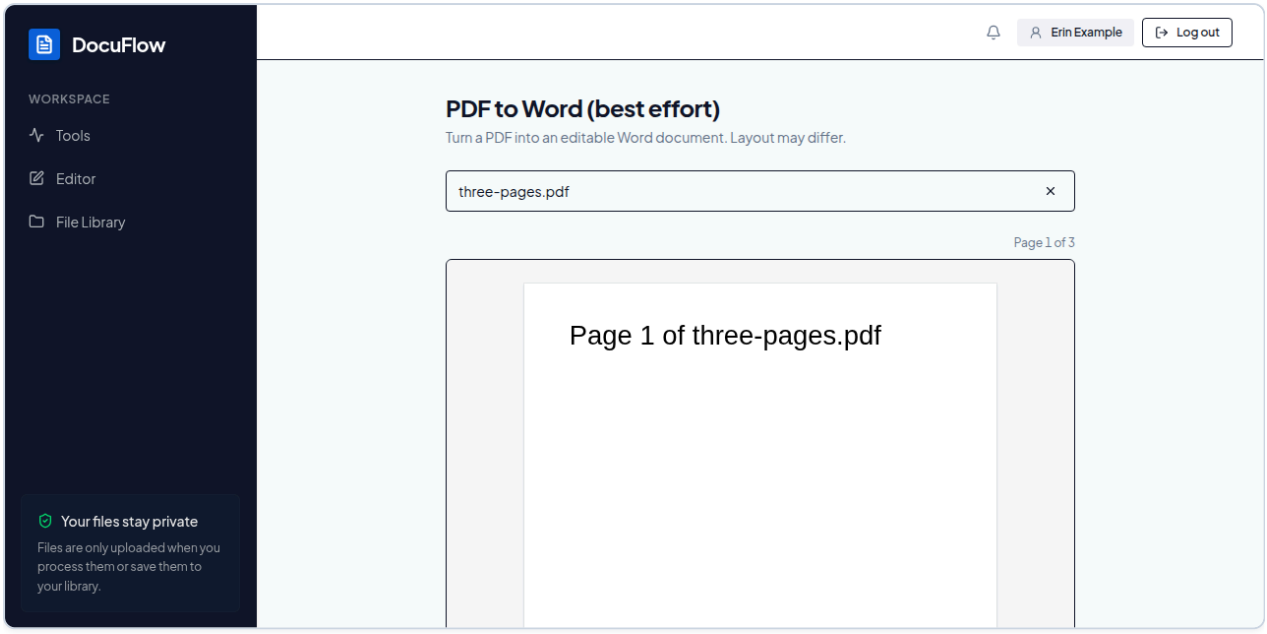

Figure: the Word result, previewed before it's downloaded.

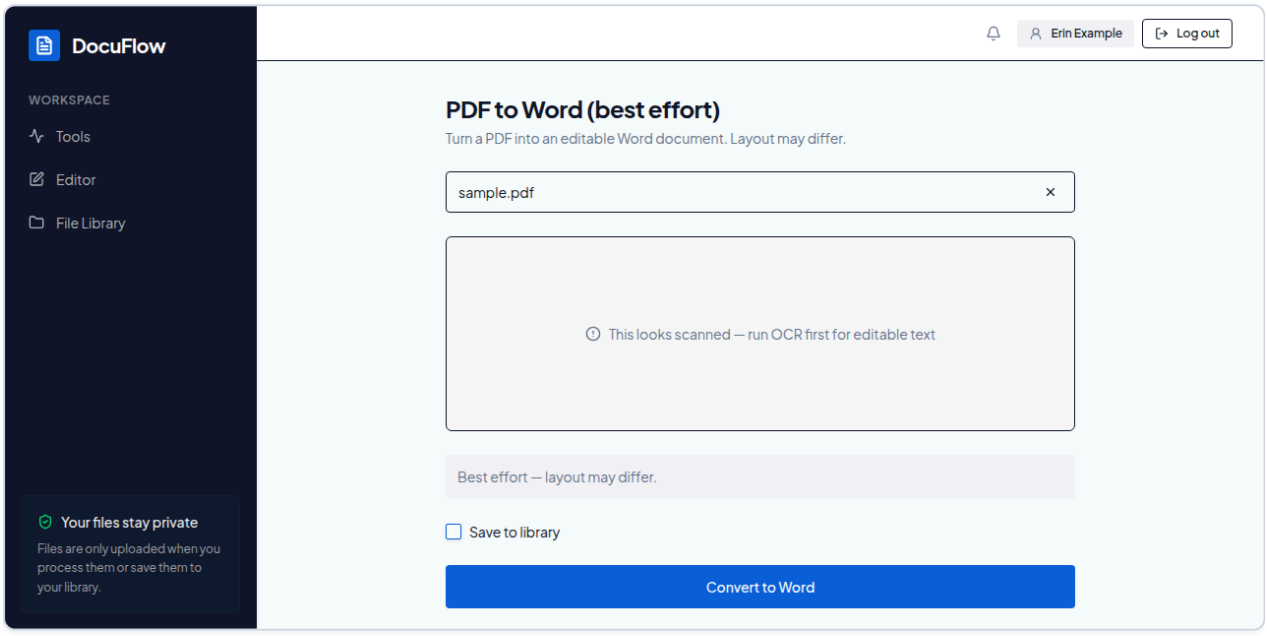

Figure: what a scanned PDF (no text layer) shows instead of a preview.

> **⚠ IF SOMETHING GOES WRONG**
>
> The reason appears under the button. If ticking **Save to library** fails, you'll see "Couldn't save to the library — the download still worked." — the download itself already succeeded.

4.3. PDF to Excel (best effort)

Turns a PDF into a spreadsheet you can open in Excel or LibreOffice. Tables become real cells — with their fonts, colours, borders and merged headings — and numbers stay numbers you can add up. The page states plainly: **"Best effort — layout may differ."**

To convert a PDF to Excel:

1. Drop your PDF, or use **Choose file** or **From library**.
2. Make your three choices (you can change them at any time; the preview updates):
   - **Sheets** — **One sheet per page** (each page on its own sheet, named Page 1, Page 2, …) or **Everything in one sheet** (all pages on one sheet, each new page starting under a grey "Page 2", "Page 3" … row).
   - **Layout** — **Keep the data tidy** ("Tables stay tables you can sort and add up.") or **Match the page layout** ("Everything sits where it did on the page; cells may be narrow or merged.").
   - **File type** — **Excel (.xlsx)** for any recent Excel, **Older Excel (.xls)** for Excel 97–2003, or **LibreOffice (.ods)** for LibreOffice Calc.
3. Files up to 25 MB convert and preview automatically, and again every time you change a choice — the old preview stays on screen with "Updating preview…" until the new one is ready. Over 25 MB, the file's info card lists your choices in words ("Your choices: One sheet per page · Keep the data tidy · Excel (.xlsx)"); select **Convert to Excel** to run it.

Your choices are remembered until you close the browser tab.

What you'll see: a preview of the result rendered as a PDF, and a **Download** `<file>.xlsx` button (`.xls` or `.ods` if you chose that file type) that's ready as soon as the workbook itself is done (the preview can take a moment longer). If the preview can't be built, you'll see "Preview isn't available for this file — the download still works." Pick a scanned PDF (no text layer) and you'll see "This looks scanned — run OCR first for editable text" the instant you pick it, in the preview area — over 25 MB the same warning appears in the file's info card instead, which also always notes "Layout may shift slightly in conversion." Either way, run **OCR (make searchable)** first; converting a scan anyway ends with the engine's own "This PDF has no text to convert. Run OCR (make text searchable) first." A **Save to library** checkbox (off by default) keeps the converted workbook in your File Library too, alongside the download.

> ⚠ **IF SOMETHING GOES WRONG**
>
> The reason appears under the button. A very long document can be too big for the older format: you'll see "This document is too large for the older Excel format. Choose Excel (.xlsx) instead." If the workbook can't be saved as .xls or .ods, you'll see "Conversion failed. The workbook could not be saved in that file type. Choose Excel (.xlsx) instead." — choose **Excel (.xlsx)** and convert again. If ticking **Save to library** fails, you'll see "Couldn't save to the library — the download still worked." — the download itself already succeeded.

4.4. PDF to PowerPoint (best effort)

Turns a PDF into an editable PowerPoint: each page becomes a slide with editable text boxes and its images kept in place.

To convert a PDF to PowerPoint:

1. Drop your PDF, or use **Choose file** or **From library**.
2. Files up to 25 MB convert and preview automatically; over that, select **Convert to PowerPoint** — you still get the preview once it finishes.

What you'll see: a preview of the result rendered as a PDF, and a **Download** `<file>.pptx` button that's ready as soon as the presentation itself is done (the preview can take a moment longer). If the preview can't be built, you'll see "Preview isn't available for this file — the download still works." Pick a scanned PDF (no text layer) and you'll see "This looks scanned — run OCR first for editable text" the instant you pick it, in the preview area — over 25 MB the same warning appears in the file's info card instead, which also always notes "Layout may shift slightly in conversion." Either way, run **OCR (make searchable)** first; converting a scan anyway ends with the engine's own "This PDF has no text to convert. Run OCR (make text searchable) first." A **Save to library** checkbox (off by default) keeps the converted presentation in your File Library too, alongside the download.

> ⚠ **IF SOMETHING GOES WRONG**
>
> The reason appears under the button. If ticking **Save to library** fails, you'll see "Couldn't save to the library — the download still worked." — the download itself already succeeded.

4.5. PDF to images

Exports PDF pages as image files.

To export a PDF as images:

1. Drop your PDF, or use **Choose files** or **From library**.
2. Choose an **Image format** — **PNG** ("Sharp, larger files"), **JPG** ("Smaller files, best for photos") or **WebP** ("Small files for the web").
3. Adjust **Image detail** — higher gives sharper, larger images.
4. Optionally, under "More options", limit which **Pages** to export.
5. Select **Convert to images** (or **Convert** `<n>` **PDFs to images** with several files).

The preview shows the pages that will actually become images, updating as you change **Pages**.

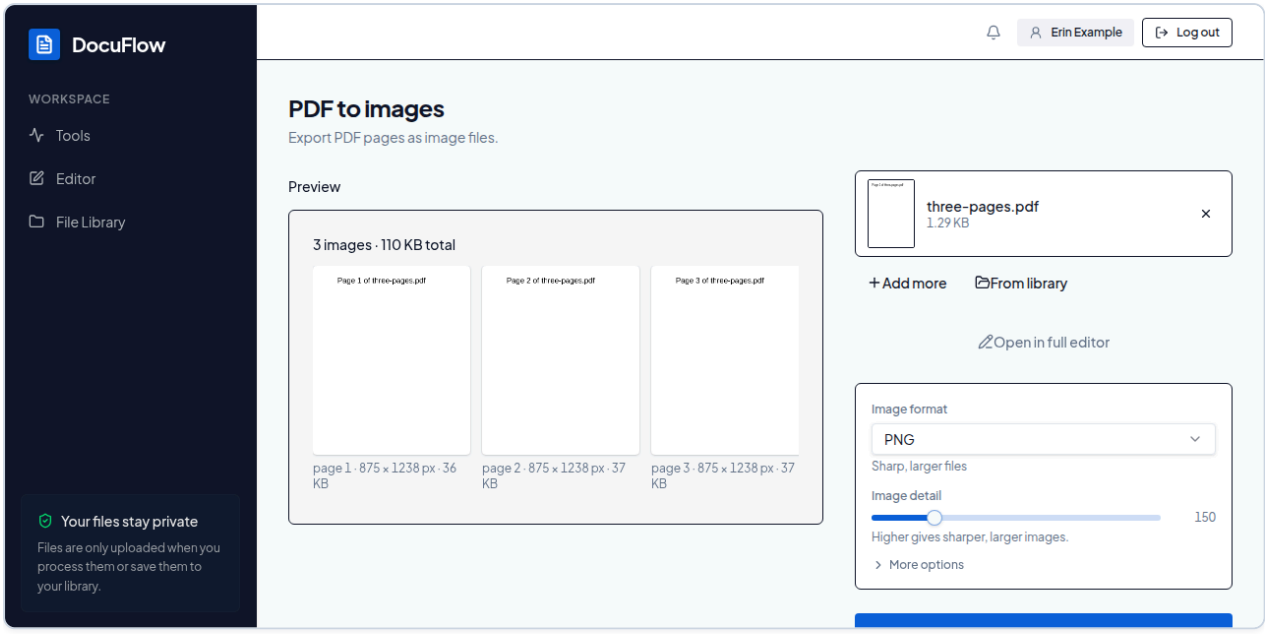

Figure: each page previewed as its own image, before conversion runs.

What you'll see when it's done: each converted file appears with a download button; a PDF of more than one page comes back as a single zip of images. Use **Download all (.zip)** with more than one result, **Save to library**, or **Open in editor**.

> ⚠ **IF SOMETHING GOES WRONG**
>
> A failed row shows its reason with **Try again**.

4.6. Images to PDF

Combines images into a single PDF.

To combine images into a PDF:

1. Open **Images to PDF**. You'll see: "Your images are pages now. Add more or reorder them, then export one PDF."
2. Add your image files — each one becomes a page, in the order you add them; use **Add files** to add more, or drag pages to put them in a different order.
3. Select **Export**.

What you'll see when it's done: the dialog's primary button reads **Download PDF** (with no export steps turned on, as here). If you have more than one document open, tick **Export all documents** first to export every open one in a single go — it continues past a failed document and skips any with no pages.

> ⚠ **IF SOMETHING GOES WRONG**
>
> A failed document shows **Try again** beside it.

4.7. PDF to text

Extracts a PDF's text content.

To extract a PDF's text:

1. Drop your PDF.
2. Select **Extract text** (or **Extract text from** `<n>` **PDFs** with several files).

What you'll see when it's done: a text file per PDF, ready to download.

> ⚠ **IF SOMETHING GOES WRONG**
>
> A failed row shows its reason with **Try again**.

4.8. PDF to Markdown

Exports a PDF's text as a Markdown document.

To convert a PDF to Markdown:

1. Drop your PDF.
2. Select **Convert to Markdown**.

What you'll see when it's done: the first part of the Markdown text shown on screen (cut off with "…" if it's long), with a **Download** `<file>.md` button below it. A scanned PDF with no text layer is refused — run **OCR (make searchable)** first.

> ⚠ **IF SOMETHING GOES WRONG**
>
> The reason appears under the button, with **Details** for the raw message underneath.

4.9. PDF to HTML

Exports a PDF's pages as one self-contained HTML file.

To convert a PDF to HTML:

1. Drop your PDF.
2. Select **Convert to HTML**.

The preview shows the file's type, size and page count, plus "Layout may shift slightly in conversion" and, for a scanned PDF, "This looks scanned — run OCR first for editable text".

What you'll see when it's done: "Done — `<file>.html` is ready", with a download button for the HTML file.

> ⚠ **IF SOMETHING GOES WRONG**
>
> The reason appears under the button, with **Details** for the raw message underneath.

4.10. HTML to PDF

Renders an HTML file or a public web page to PDF.

To convert a web page or HTML file to PDF:

1. Either drop an `.html` / `.htm` file, or leave the file field empty and type an address under **Or render a web page** (placeholder "`https://example.com/page`"). Choosing a file disables the address field — "Remove the file above to convert a web page instead."
2. If typing an address, it must be a full address starting with `http://` or `https://` — otherwise you'll see "Enter a full http:// or https:// address." A "public" page means one reachable from the open internet: "Public http(s) pages only — the engine refuses private-network addresses."
3. Select **Convert to PDF**.

What you'll see when it's done: "Done — `<file>.pdf` is ready", with a download button for the PDF.

> ⚠ **IF SOMETHING GOES WRONG**
>
> The reason appears under the button, with **Details** for the raw message underneath — for example, if the address points at a private network, the engine refuses it.

4.11. OCR (make searchable)

Makes a scanned PDF searchable, so its text can be selected and found.

To make a PDF searchable:

1. Drop your PDF, or use **Choose files** or **From library**.
2. Choose the **Document language** — English, Nepali, "English and Nepali", Hindi, German, French or Spanish — or type a code under **Other language** (a Tesseract language code, e.g. `ita`, combined with `+` for more than one).
3. Adjust **Scan detail** under "More options" if needed.
4. Select **Make searchable** (or **Make `<n>` PDFs searchable** with several files).

Above the button, the preview tells you what OCR will actually do to this file: "Pages 1–3 have no text layer and will be recognised", or, if the file already has text throughout, "Every page already has text — recognising it again changes little". A long PDF may show "Only the first `<n>` pages were checked".

What you'll see when it's done: the searchable PDF, ready to download, alongside the recognised text as a second file.

> **⚠ IF SOMETHING GOES WRONG**
>
> On a device without the language pack installed and no internet connection, you'll see "This tool can't run on this device alone. Connect to the internet and try again." A failed row otherwise shows its reason with **Try again**.

5. Images

These tools change a picture rather than a document: resizing it, making its file smaller, turning or flipping it, cutting out its background, changing its file format, or moving between photos and scalable vector shapes. **Resize image** and **Remove background** open the same image workspace as the full editor; the others each open their own page.

Before you start

You need an image file. **Resize image** and **Remove background** accept the same image types the editor opens generally (PNG, JPG, WebP, GIF, BMP). **Convert images** and the two SVG tools additionally accept TIFF, ICO, HEIC/HEIF photos and SVG files. **Rotate image** accepts any image file. **Compress image** accepts JPG, PNG, WebP, GIF, BMP, TIFF and HEIC/HEIF pictures (not SVG or ICO). HEIC/HEIF photos need the engine to support them — if it doesn't, you'll see "HEIC input needs libheif on the engine."

Tips

- Uploading a photo to a form that says "under 200 KB"? Type 200 in **Keep under** on **Compress image** — DocuFlow lowers the quality, then the size, until it fits.
- **Resize image** never compounds quality loss — each resize starts again from the original picture (or your last non-resize edit), not from a previous resize's result.
- Use **SVG to image** when you need a fixed-size picture (for a document or a slide); use **Image to SVG** when you need a shape that stays sharp at any size (for a logo used at many sizes).
- **Image to SVG** works best on logos, icons and drawings — a photograph comes out as flat colour shapes, not a faithful copy.
- If a HEIC photo (typically from an iPhone) won't convert, the engine you're connected to may not support HEIC yet — "HEIC input needs libheif on the engine."
- **Remove background** is undoable like any other edit — select **Undo** if the result isn't what you wanted. Switching between **Flat colour** and **Photo (AI)**, or moving **Tolerance**, changes the result in place, so one **Undo** still takes it all back.
- Finished editing a picture in the image workspace and want it in a PDF instead of on its own? Select **Add to PDF** to carry it straight into the PDF editor without downloading it first.

5.1. Resize image

Changes an image's dimensions.

To resize an image:

1. Open **Resize image** and add your picture. You land on the **Image** tab of the image workspace.
2. Select **Resize** in the toolbar. A panel appears with **Width** and **Height** boxes (in px), a **Keep proportions** lock, and 25%/50%/75%/100% preset buttons — the panel also shows the picture's original size.
3. Type a new width or height (with **Keep proportions** on, the other side follows automatically), pick a preset percentage, or drag a corner handle on the picture itself.
4. Once you're happy, open the **Output** tab to choose the file format (PNG, JPG or WebP) and quality, then select **Download image** (**Save image** on desktop).

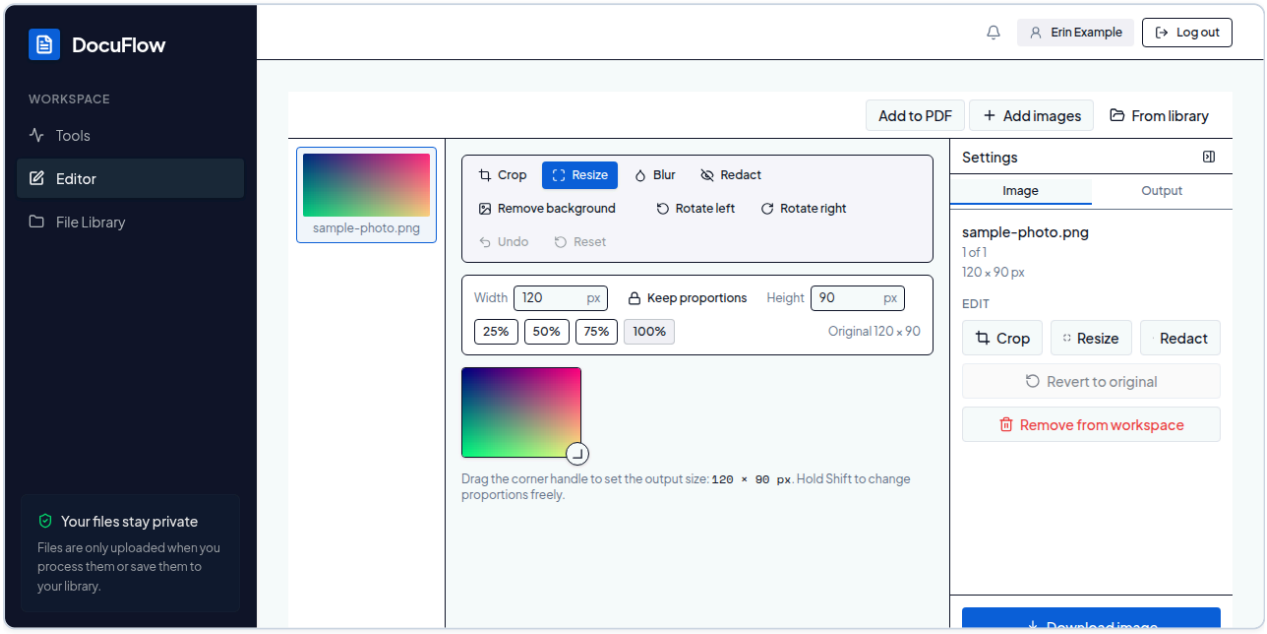

Figure: the Resize panel, with the picture's original size shown above it.

As you adjust the width, height or a preset, the picture on screen resizes immediately — nothing is sent anywhere. Resizing again always starts from the original picture (or from your last crop, blur or other non-resize edit), never from a previous resize's result, so resizing down and back up repeatedly doesn't compound quality loss. Width and height are each limited to 8,000 pixels, and the total size to 40 megapixels; going over either shows "Width and height can be at most 8,000 pixels." or "That size is too large. Keep it under 40 megapixels, for example 8000 × 5000."

What you'll see when it's done: the resized picture, with **Download image** (or **Download all (`<n>`)** for more than one image). On desktop this reads **Save image / Save all (`<n>`)**.

> **⚠ IF SOMETHING GOES WRONG**
>
> Typing something that isn't a whole number of pixels shows "Enter the width and height as numbers of pixels."; a size outside the limits shows one of the two size sentences above.

5.2. Compress image

Makes a photo's file size smaller — by choosing a quality, or by typing the size a form asks for, such as "under 200 KB".

To compress an image:

1. Open **Compress image** and add one or more pictures.
2. Move **Quality** — lower makes a smaller file. It is hidden when the result will be a PNG, because a PNG gets smaller by using fewer colours instead.
3. If a form asks for a photo under a certain size, type that number of KB in **Keep under** — for example 200. Leave it empty for no limit.
4. Under **Format**, keep **Same as original** or choose **JPG**, **WebP** or **PNG**.
5. Select **Compress image** (with several pictures it reads, for example, **Compress 3 images**).

Option	What it does
Quality	Lower makes a smaller file. Starts at 70.
Keep under	In KB, e.g. 200. If lower quality isn't enough, the picture's width and height are reduced too. A picture that already fits the limit is never made smaller in width and height — it is saved once at your quality, or kept exactly as it is if that would not make it smaller. Empty means no limit; anything other than a whole number of KB shows "Enter a whole number of KB, such as 200." and the button waits.
Format: Same as original	JPG, PNG and WebP keep their format; other types become JPG
Format: JPG	Smaller files, best for photos
Format: WebP	Small files for the web
Format: PNG	Sharp, larger files. A PNG keeps its exact colours when it has few enough, otherwise it gets fewer colours.

Before you press anything, the first picture is shown twice, **Original** and **Compressed**, with the new size under them, measured in your browser: for example "→ 180 KB (from 1.5 MB)". With **Keep under** set, the line says which quality got it there — "→ 196 KB at quality 40 (from 1.5 MB)" — and gives the new width and height if the picture also had to be made smaller. When the format changes, the line starts with it ("→ JPG · 180 KB (from 1.5 MB)"). A very large photo is measured on a smaller copy and says "about … (estimate, …)". If the picture can't get any smaller in its own format, you'll see "Already as small as it gets — your original will be kept". If even the smallest version is over your limit, you'll see "Even the smallest version is about 240 KB — try a higher limit." For a PNG result, and for pictures your browser can't open (HEIC, TIFF), the line reads "→ size available after compressing"; a PNG also shows "PNG pictures get smaller by using fewer

colours, which this preview can’t show." The preview is a close estimate; the real size is shown when it's done.

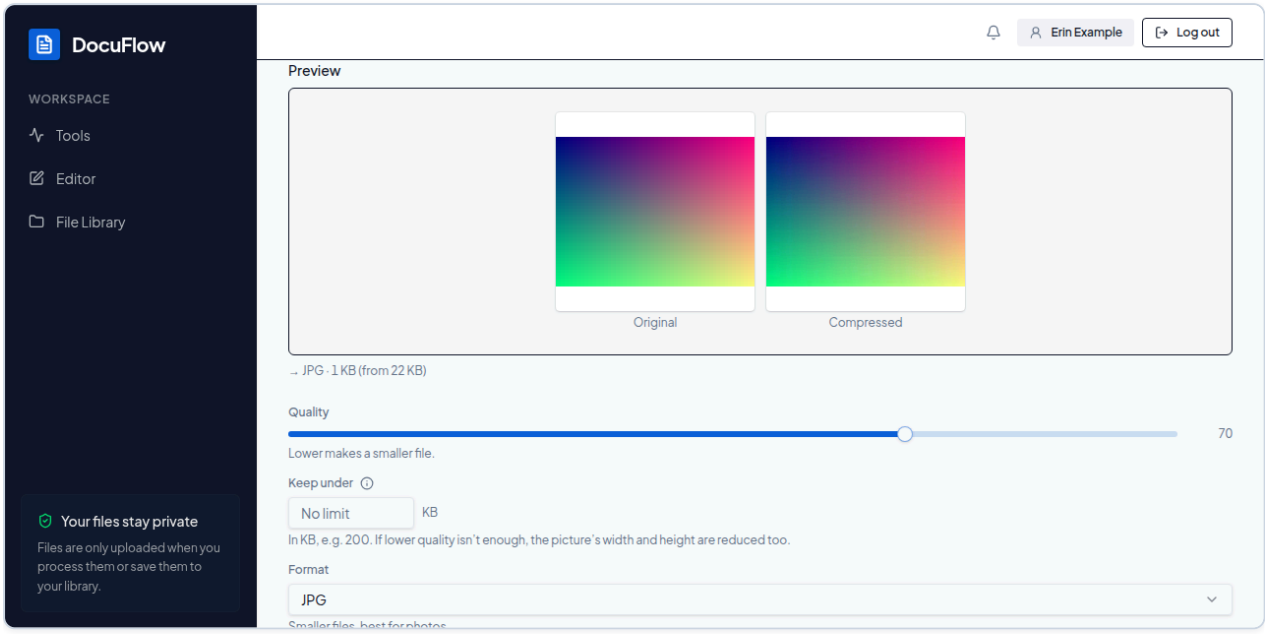

Figure: the photo before and after compressing, with the new size shown before anything is pressed.

What you'll see when it's done: "Done" (or, for example, "2 of 3 done") and one row per picture with the new file's name — for example "photo_compressed.jpg" — and its size before and after, such as "1.5 MB → 180 KB" with "−88%". Each row has **Download** (**Save** on desktop); with two or more pictures, **Download all (.zip)** saves them together. **Save to library** keeps the results in your File Library; **Save to Google Drive** and **Save to OneDrive** appear when they are connected; **Start over** clears the page. If a picture was already as small as it gets, its row says "Already as small as it gets — your original is returned." and the file is your original, unchanged.

> **⚠ IF SOMETHING GOES WRONG**
>
> When a picture can't fit your limit, its row says so in numbers — for example "This image can’t get under 5 KB — the smallest DocuFlow could make it is 9 KB." Try a higher **Keep under**. A HEIC/HEIF photo on an engine that doesn't support it shows "Something went wrong while processing this file.", and **Details** reads "HEIC input needs libheif on the engine." Select **Try again** on a failed row to send just that picture again.

Compressing saves the picture afresh, so it removes the photo details stored inside the file, such as the camera and the place it was taken. The desktop app compresses JPG, PNG, WebP, GIF and BMP pictures on your computer when you're offline or signed out. There, a HEIC or TIFF photo shows "This picture can’t be opened without an internet connection. Connect and try again, or choose a JPG, PNG or WebP." Choosing WebP on a computer that can't save it shows "Saving as WebP needs an internet connection on this computer. Choose JPG or PNG, or connect and try again."

5.3. Rotate image

Rotates and/or flips an image.

To rotate or flip an image:

1. Open **Rotate image** and add your picture.
2. Under **Turn**, choose **Don't turn**, **90° right**, **180°** or **90° left** (the tool starts at **90° right**).
3. Under **Flip**, choose **No flip**, **Left ↔ right** or **Top ↔ bottom** — the flip is applied after the turn.
4. Select **Rotate image**.

The preview turns your picture on screen exactly as it will be saved, with a caption giving the size before and after — for example "120 × 90 px → 90 × 120 px". Before you add a picture, the preview says "Add an image".

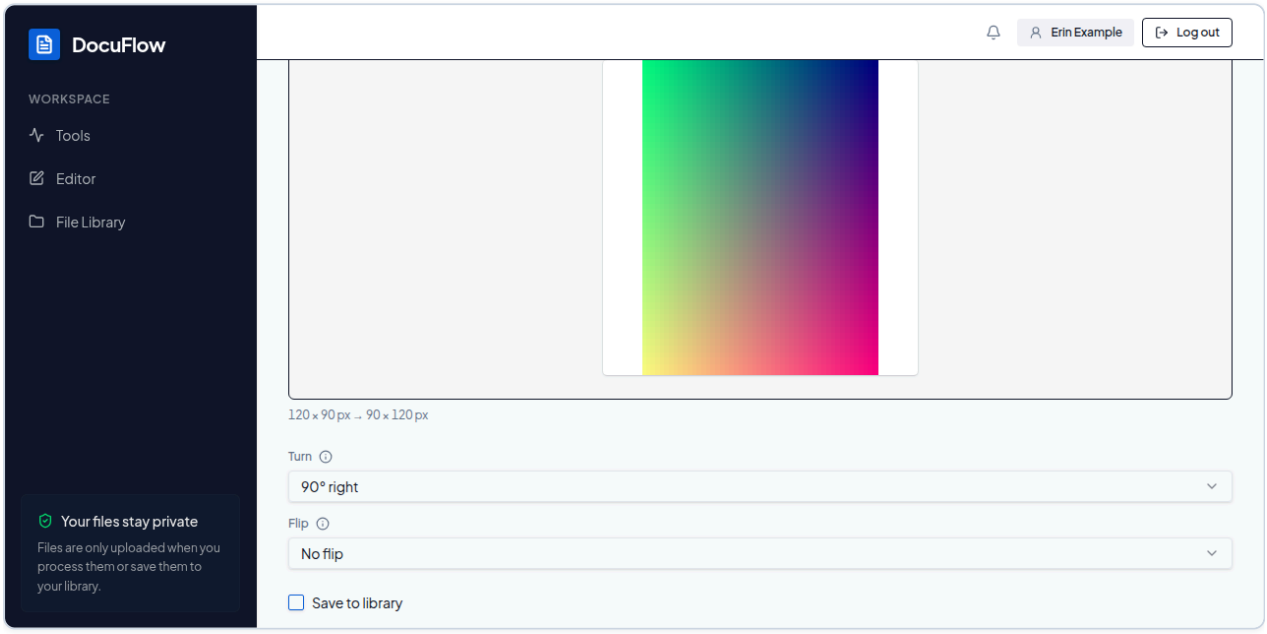

Figure: the picture, already turned, before Rotate image is run.

What you'll see when it's done: the rotated picture, ready to download.

> ⚠ **IF SOMETHING GOES WRONG**
>
> A failed run shows its reason with **Try again**.

5.4. Remove background

Erases an image's background — plain backgrounds behind logos and charts as well as photo backgrounds.

To remove an image's background:

1. Open **Remove background** and add your picture. It runs at once — there is nothing else to press. While it runs you'll see "Removing background…".
2. DocuFlow picks the way that suits the picture, and the panel above it says which: "Background: Flat colour (auto)" for a logo, chart or drawing on one plain colour, or "Background: Photo (auto)" for a photo.
3. The removed parts show as a grey-and-white checkerboard. That pattern is only on screen — it is never part of your file.
4. Select **Original** to see the picture as it was, and **Result** to see it with the background removed.
5. For a plain background, move **Tolerance** ("Higher removes more shades close to the background colour.") to remove more or fewer shades. The picture updates as you move it.
6. To change how the background is found, choose under **Background type**: **Auto** ("DocuFlow picks the best way for this picture."), **Flat colour** ("For logos, charts and graphics on one plain colour.") or **Photo (AI)** ("For photos of people, animals and things.").
7. Not happy with it? Select **Undo** — one Undo brings the whole background back, however often you changed the type or the Tolerance.
8. When you're ready, open the **Output** tab and select **Download image** (**Save image** on desktop). **PNG**, the starting choice, keeps the transparency, and so does **WebP**. If you choose **JPG**, you'll see "JPG has no transparency, so the background becomes white." and the removed background is saved as white.

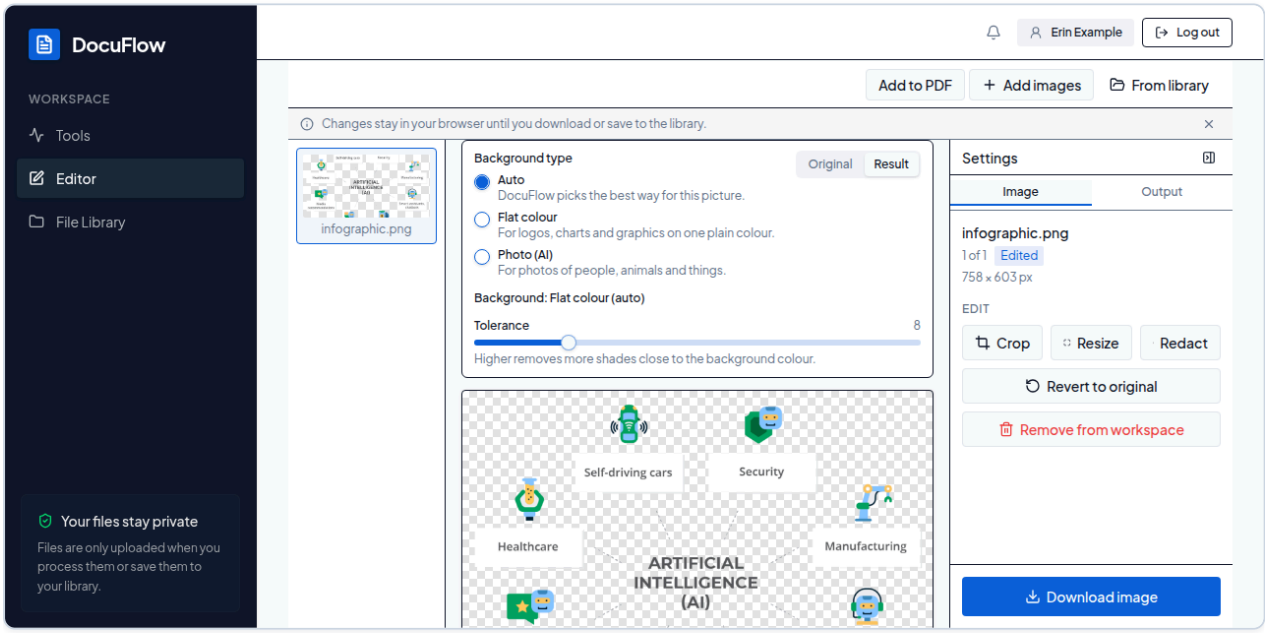

Figure: a chart's plain background removed; the checkerboard shows what is now transparent.

Flat colour only removes the background that touches the edges of the picture: the same colour inside a drawing — the middle of an "O", or a gap inside an icon — stays. **Photo (AI)** downloads its model (about 88 MB) the first time it is used; after that it comes from your browser.

What you'll see when it's done: the picture with its background shown as a checkerboard, "Background: Flat colour (auto)" or "Background: Photo (auto)" in the panel, and **Download image** (**Save image** on desktop) on the **Output** tab.

> ⚠ **IF SOMETHING GOES WRONG**
>
> - "Photo (AI) needs an internet connection the first time, to download its model. Connect and try again, or choose Flat colour." — the picture stays as it was and the choice goes back to the one before.
> - "Nothing matched the background colour. Try a higher Tolerance, or Photo (AI)." — the picture has no plain background at its edges at this Tolerance.
> - "The background could not be removed." — anything else; try again, or try the other type.

5.5. Convert images

Converts images between PNG, JPG, WebP, TIFF, SVG and more — HEIC photos included.

Format	Note shown
PNG	Sharp, larger files
JPG	Smaller files, best for photos
WebP	Small files for the web
TIFF	For print and scanning software
BMP	Uncompressed, very large files
GIF	256 colours
ICO	A Windows icon
SVG (scalable vector)	Shapes that stay sharp at any size

To convert images:

1. Open **Convert images** and add one or more pictures.
2. Choose the format under **Convert to**.
3. For a JPG or WebP result, adjust **Quality** — lower makes a smaller file.
4. Select **Convert images**.

The first picture you add is previewed at the size the chosen format and quality will produce. If any of your files is an SVG, you'll see: "Animations and scripts inside the SVG are not kept; the picture is converted as a still image." Converting a photo or other raster picture into an SVG shows: "Photos come out as flat colour shapes; logos, icons and drawings convert best."

What you'll see when it's done: one converted file per picture, ready to download, or **Download all (.zip)** for more than one.

> ⚠ **IF SOMETHING GOES WRONG**
>
> Converting a HEIC/HEIF photo on an engine that doesn't support it shows **"HEIC input needs libheif on the engine."** A failed row otherwise shows its reason with **Try again**.

5.6. SVG to image

Turns an SVG into a PNG, JPG or WebP at any size.

To turn an SVG into an image:

1. Open **SVG to image** and add your SVG file. This opens **Convert images** with **PNG** already chosen under **Convert to**.
2. Change the format or **Width (px)** if you want — leaving Width empty uses the SVG's own width; the height follows the SVG's shape.
3. Select **Convert images**.

You'll see the same note as in Convert images: "Animations and scripts inside the SVG are not kept; the picture is converted as a still image."

What you'll see when it's done: the converted image, ready to download.

> ⚠ **IF SOMETHING GOES WRONG**
>
> A failed row shows its reason with **Try again**.

5.7. Image to SVG

Traces a logo, icon or drawing into scalable vector shapes.

To trace a picture into an SVG:

1. Open **Image to SVG** and add your picture. This opens **Convert images** with **SVG (scalable vector)** already chosen under **Convert to**.
2. Choose **Colours** — fewer colours give simpler shapes, and 2 is black and white.
3. Choose **Detail** — **Low** ("Smooth shapes; specks and noise are removed."), **Medium** ("A good balance for most logos and drawings.") or **High** ("Keeps fine lines and small features.").
4. Select **Convert images**.

You'll see the note: "Photos come out as flat colour shapes; logos, icons and drawings convert best." — a real photo rarely traces well; this works best on logos, icons and simple drawings.

What you'll see when it's done: the traced SVG file, ready to download.

> ⚠ **IF SOMETHING GOES WRONG**
>
> A failed row shows its reason with **Try again**.

6. Protect & check

These tools guard a PDF with a password, remove hidden information, or check that a file is sound. Each opens as its own page: drop a file, set the few options it needs, and press the one button.

Before you start

You need a PDF. **Protect with a password**, **Remove a password**, **Flatten PDF** and **Sanitize PDF** need the online engine — on desktop, without a connection, each shows "Needs an internet connection to `<verb>` PDFs" and disables its button; in the browser, an unreachable engine shows "This tool needs the online engine, which is unreachable right now." **Compare PDFs** needs exactly two files.

Tips

- **Protect with a password** and **Remove a password** are opposites — use Protect to lock a file down, Remove to open one back up once you have its password.
- Sanitizing removes document details, attachments, scripts, links and comments — it does not touch the visible content of the pages. Use **Black out** in the editor for hiding what's actually printed on a page.
- Flattening drops links along with form fields and comments — if you need to keep a page's hyperlinks working, sanitize instead (leaving "Remove links and comments" unticked) or don't flatten it.
- Compare only reads text, so run OCR first on a scanned file before comparing it.
- On Edit metadata, leaving a box exactly as it was read keeps that value — only an emptied box is treated as a removal.
- If a simple tool page isn't giving you what you need, **Open in full editor** (shown under the file when there's just one) hands the same file to the full editor with this tool already selected.

6.1. Protect with a password

Adds a password to a PDF, so anyone opening it has to type it first.

To protect a PDF:

1. Drop your PDF.
2. Type a **Password** — "Anyone opening the PDF will need this password." As you type, a strength note appears: "Too short — at least 4 characters", "Short — easy to guess", "Fair — longer is safer", or "Long — hard to guess".

3. Optionally, under "More options", set a **Permissions password** — "A second password for changing or removing the protection."
4. Select **Protect PDF** (the button reads **Protect 3 PDFs** with several files).

The preview above the options always shows "Anyone opening this PDF will need the password"; if the file is already protected, it also shows "This PDF is already encrypted — the new password replaces its protection".

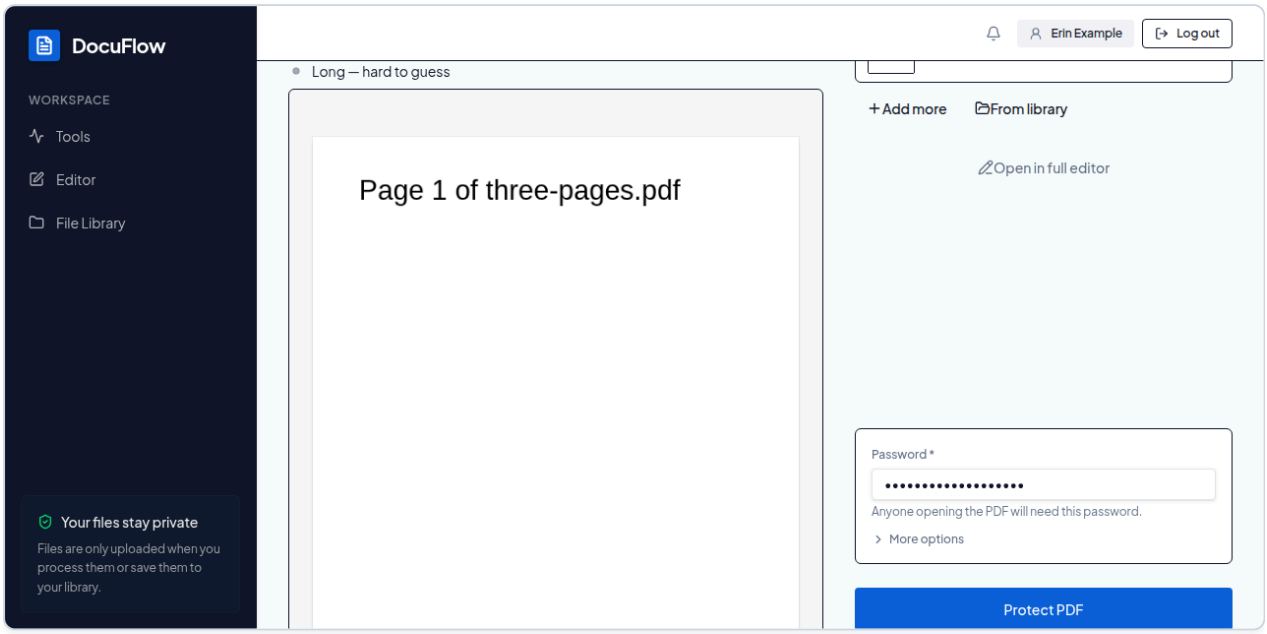

Figure: typing a password, with the strength note updating as you type.

What you'll see when it's done: a **Done** card with the protected file, ready to download, save to your library, open in the editor, or start over.

> **⚠ IF SOMETHING GOES WRONG**
>
> A failed file shows a plain reason with **Try again** beside it, and **Details** for the raw message underneath.

6.2. Remove a password

Removes a PDF's password so it opens without one.

To remove a password:

1. Drop your protected PDF.
2. Type its **Current password** — "The password that opens this PDF".
3. Select **Remove password**.

The preview reads the file as you go: "This PDF is password-protected", then "Checking the password…" once you've typed one, and either "Password correct — the unlocked file will have `<n>` pages" or "That password doesn't open this file". If the file has no password at all, it says

"This PDF has no password — nothing to remove". A file that opens without a password but still carries restrictions shows "This PDF opens without a password but has restrictions — removing them needs the permissions password". A file that won't open at all shows "This file couldn't be opened — it may be damaged rather than locked."

What you'll see when it's done: a **Done** card with the unlocked PDF, ready to download, save to your library, open in the editor, or start over.

> ⚠ **IF SOMETHING GOES WRONG**
>
> The same preview line tells you why before you even press the button; a failed run also shows **Try again**.

6.3. Flatten PDF

Turns form fields and comments into ordinary page content, so they can no longer be edited — and drops links in the process.

To flatten a PDF:

1. Drop your PDF. There are no options to set.
2. Select **Flatten PDF**.

The preview says what will change: something like "`<n>` form fields and `<n>` comments will become part of the page (no longer editable)", or, if there's nothing to flatten, "No form fields, comments or links found — flattening changes nothing."

What you'll see when it's done: a **Done** card showing the file's size before → after, with the usual download, save, open-in-editor and start-over options.

> ⚠ **IF SOMETHING GOES WRONG**
>
> A failed row shows its reason with **Try again**.

6.4. Sanitize PDF

Strips hidden information you may not want to share: document details, attached files, scripts, links and comments — you choose which.

To sanitize a PDF:

1. Drop your PDF.
2. Tick what to remove: **Remove document details (title, author…)**, **Remove attached files**, **Remove scripts**, **Remove links and comments**. The first three are ticked by default; links and comments are not.
3. Select **Sanitize PDF**.

The preview lists what each ticked item will actually remove from this file, for example "Will remove 3 document properties (Title, Author, Subject)" or "Will remove 2 attachments (invoice.xlsx, notes.txt)". An item with nothing to remove shows its own "none found" line, e.g. "Attachments: none found"; an item you haven't ticked shows what would be kept instead, e.g. "Kept: 2 links and 1 comment".

What you'll see when it's done: a **Done** card with the file's size before → after.

> ⚠ **IF SOMETHING GOES WRONG**
>
> A failed row shows its reason with **Try again**.

6.5. Compare PDFs

Shows what changed between two versions of a PDF, comparing their text.

To compare two PDFs:

1. Drop exactly two files — the tool asks for "Choose exactly 2 files." until you have.
2. Select **Compare**.

What you'll see when it's done: the differences shown inline, or, if the files read the same, "No differences found." A **Download** `<file>.txt` button gives you the same comparison as a plain text file.

> ⚠ **IF SOMETHING GOES WRONG**
>
> If one of the files looks scanned, the preview warns "This looks scanned — the comparison reads text only, so run OCR first."

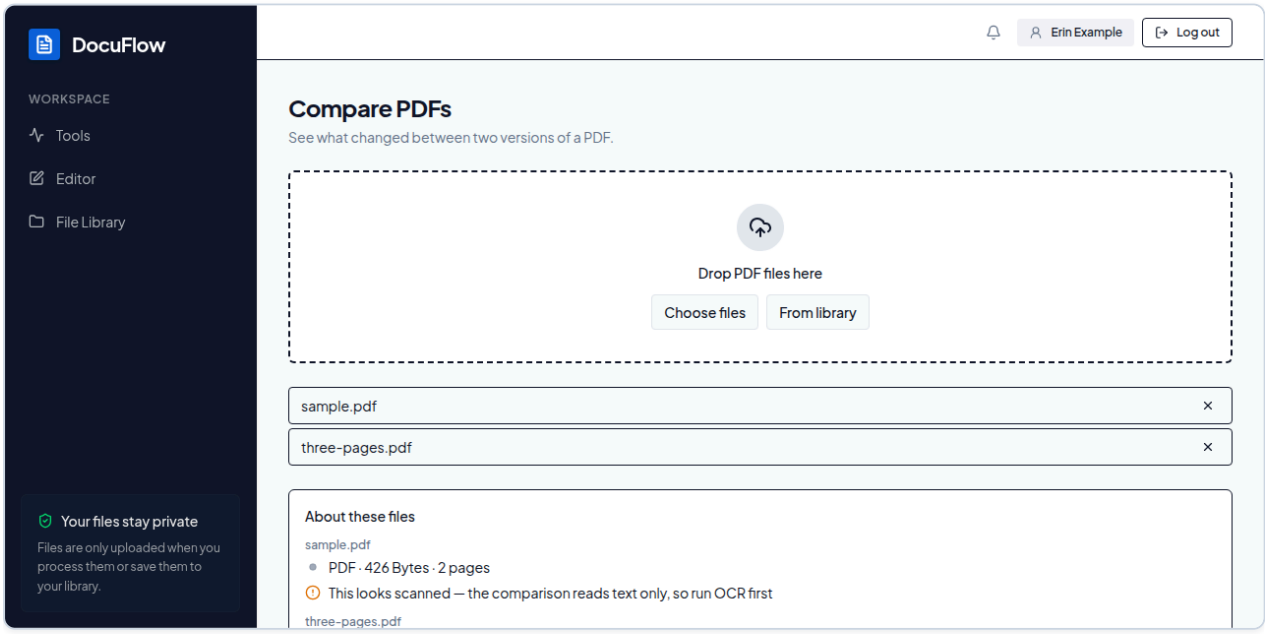

Figure: the two files' inventories, shown before Compare is run.

6.6. Repair PDF

Attempts to fix a PDF that won't open properly or has damaged pages.

To repair a PDF:

1. Drop the PDF. There are no options to set.
2. Select **Repair PDF**.

The preview checks how many pages can actually be read before you run it: "Opens fine: 3 of 3 pages can be read — repair rewrites the file cleanly", or "Only 1 of 3 pages can be read — worth repairing". A password-protected file shows "This PDF is password-protected — remove the password first"; a file that won't open at all shows "This file couldn't be opened — worth repairing."

What you'll see when it's done: "Done — `<file>.pdf` is ready", with a download button for the repaired file.

> ⚠ **IF SOMETHING GOES WRONG**
>
> A failed run shows its reason under the button.

6.7. Edit metadata

Views and edits a PDF's title, author and other document properties, and saves the changes back into the file.

To edit a PDF's metadata:

1. Drop your PDF. Its properties are read the instant you drop it — there is nothing to run first.
2. Change **Title**, **Author**, **Subject** or **Keywords** as needed. **Custom (JSON)** holds any other properties the file carries — edit the JSON directly to change one.
3. To remove a property, empty its box (or delete its line from the Custom JSON). The page reminds you: "Leave a box unchanged to keep its current value. Empty a box to remove that property from the PDF. Custom (JSON) holds this file's other properties — delete one from the JSON to remove it."
4. Select **Save changes**.

You can remove at most 64 properties in one save — if you try to remove more, the page says: "One save can remove at most 64 properties at a time, and this one would remove `<n>`. Put some of them back, then remove the rest in a second save."

What you'll see when it's done: "Saved. This copy of the PDF has the properties exactly as you left them." (plus "It has also been saved to your library." if you used that option), with a download button for the result.

⚠ IF SOMETHING GOES WRONG

- While the file's properties are still being read: "Reading this file's properties…"
- If they can't be read here at all (a password-protected or damaged file): "This file's properties can't be read here, so there is nothing to save — the note above says why."
- If you haven't typed anything to change: "Nothing to save yet — type a property above."
- A problem in the Custom JSON box refuses the whole save: "`<problem>`. One fault refuses every custom property, so nothing at all is saved until it is fixed."

7. Utilities & Nepal

These tools don't touch an existing document — they generate something new. QR code and Barcode generate scannable codes; Bikram Sambat ⇄ AD converts dates; Nepali typing lets you type Nepali with an ordinary keyboard and turns old Preeti text into Unicode; Letter templates fills in an official letter — a Sifarish (सिफारिस) recommendation, a notice, a certificate — from a template your office keeps. QR code, Barcode, the date converter and Nepali typing run entirely on your device; Letter templates needs the online engine only to make a PDF and to save templates.

Before you start

No file to bring — you fill in a form and get a result. **Nepali typing** runs entirely on your device: nothing you type is sent anywhere. In Letter templates, **Download PDF** and **Save to library** need an internet connection; **Print** works offline.

Tips

- QR code and Barcode never leave your browser and don't need a file — they're the fastest way to turn a short piece of information into something scannable.
- **Edit image** on a QR code or barcode hands it straight to the image workspace if you want to resize it, add it to a page, or combine it with other images.
- The Bikram Sambat ⇄ AD converter works in both directions from the same page — change either calendar and the other follows.
- The two Sifarish samples are example wording — make a copy and put in your office's own text before sending a letter for real.
- If pop-ups are blocked, Print won't be able to open its window — allow pop-ups for DocuFlow and try again.
- **Print** works even without an internet connection — use it if **Download PDF** and **Save to library** are unavailable.
- The digits toggle only changes the letter number and date — it doesn't change how dates or numbers appear elsewhere in the letter's text (choose that per field in the builder, with **Write it as**).
- Not sure what a "Show only if…" part will say? Change the **Sample values** beside the builder's preview and watch the letter change.

7.1. QR code

Generates a QR code from text, a web address, Wi-Fi details, or a contact card, entirely in your browser.

To make a QR code:

1. Open **QR code & barcode**, on the **QR code** tab.
2. Choose a **Type**: Text, URL, Wi-Fi, or vCard.
3. Fill in the fields for that type — **Text**; **URL**; **Network name (SSID)** and **Password** for Wi-Fi; **Name**, **Phone** and **Email** for vCard.
4. Optionally change **Size** (256, 512, or 1024 pixels) or **Error correction** (L, M, Q, or H).
5. As soon as you've typed something, the QR code appears in the preview.

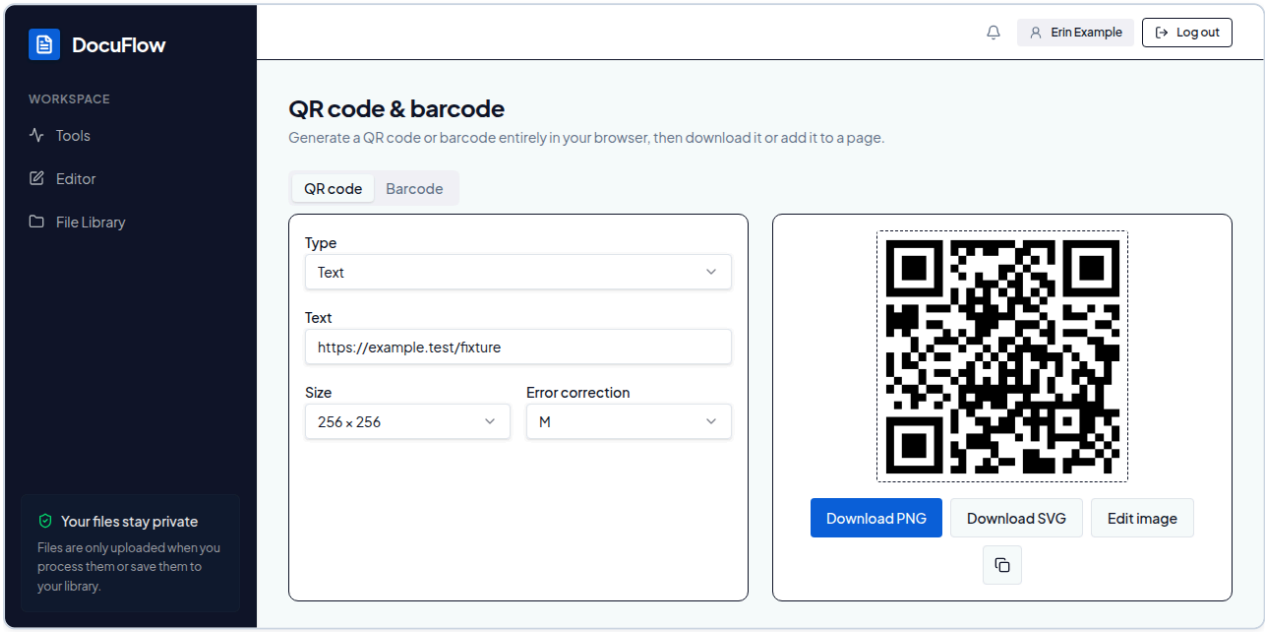

Figure: the QR code, generated in the browser as soon as something is typed.

6. Select **Download PNG** or **Download SVG** to save the image, the copy-image button (labelled "Copy image") to copy it, or **Edit image** to send it to the image editor.

What you'll see when it's done: the file in your browser's downloads (or clipboard, for copy), or the image workspace open with your QR code loaded, ready for further editing.

> **⚠ IF SOMETHING GOES WRONG**
>
> "Fill in a field to preview the QR code." until you've typed something; if what you typed is too much for the chosen size and error-correction level: "Too much data for this size and error-correction level — shorten the text or lower the level."

Type	Fields
Text	Text
URL	URL
Wi-Fi	Network name (SSID), Password
vCard	Name, Phone, Email

7.2. Barcode

Generates a 1D barcode from a value you type.

To make a barcode:

1. Open **QR code & barcode**, then select the **Barcode** tab.
2. Choose a **Format**: CODE128, EAN13, UPC, or CODE39.
3. Type the **Value**.
4. Select **Download PNG** to save the image, or **Edit image** to send it to the image editor.

What you'll see when it's done: the barcode image in your browser's downloads, or the image workspace open with it loaded.

> ⚠ **IF SOMETHING GOES WRONG**
>
> A value that doesn't fit the chosen format shows `"<value>" is not a valid <format> value.` — try a different value or format (for example, EAN13 needs a specific number of digits with a valid check digit).

Format	What it's typically used for
CODE128	General-purpose — letters, numbers and punctuation
EAN13	Retail product barcodes (13 digits)
UPC	Retail product barcodes (North America)
CODE39	Letters and numbers, widely supported by older scanners

7.3. Bikram Sambat ⇄ AD

Converts a date between the Bikram Sambat and Gregorian calendars. The page heading reads "Nepali Date Converter".

To convert a date:

1. Open **Bikram Sambat ⇄ AD**.
2. In either the **Bikram Sambat** or **Gregorian** card, pick **Year**, **Month** and **Day**.
3. The other card updates immediately to the matching date.
4. Select **Today** to reset both cards to today's date.

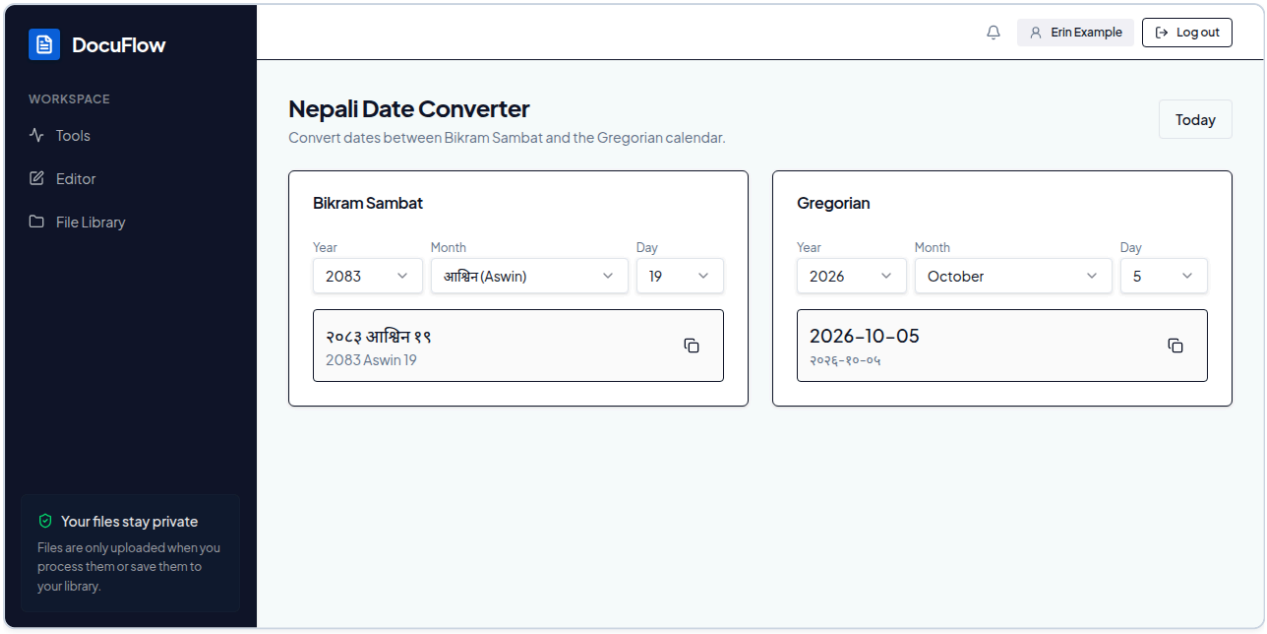

Figure: the Nepali Date Converter, with both calendars showing the same date.

What you'll see when it's done: each card shows the date in both Devanagari and English text, with a copy button beside it — pressing it shows "Copied" briefly.

> **⚠ IF SOMETHING GOES WRONG**
>
> Dates outside the range the converter supports are simply not selectable in the lists.

7.4. Nepali typing

Lets you type Nepali with an ordinary English keyboard — as it sounds, or with the Nepali keyboard layout — and turns text typed in the old Preeti font into Unicode. It runs entirely on your device: nothing you type is sent anywhere, and nothing is saved.

To type in Nepali:

1. Open **Nepali typing** (under **Nepal**). It opens on the **Type Nepali** tab.
2. Under **How do you want to type?**, choose **As it sounds**. (**English** turns Nepali typing off on this page.)
3. Click in **Your text** and type `namaste` . नमस्ते appears while you type; the letters you typed and other spellings show under the line.
4. Press Space to keep the word. For another spelling, press Tab until it shows, then Space — or press its number, such as 2.
5. Select **Copy**, or **Download .txt** to save the text as `nepali-text.txt` .

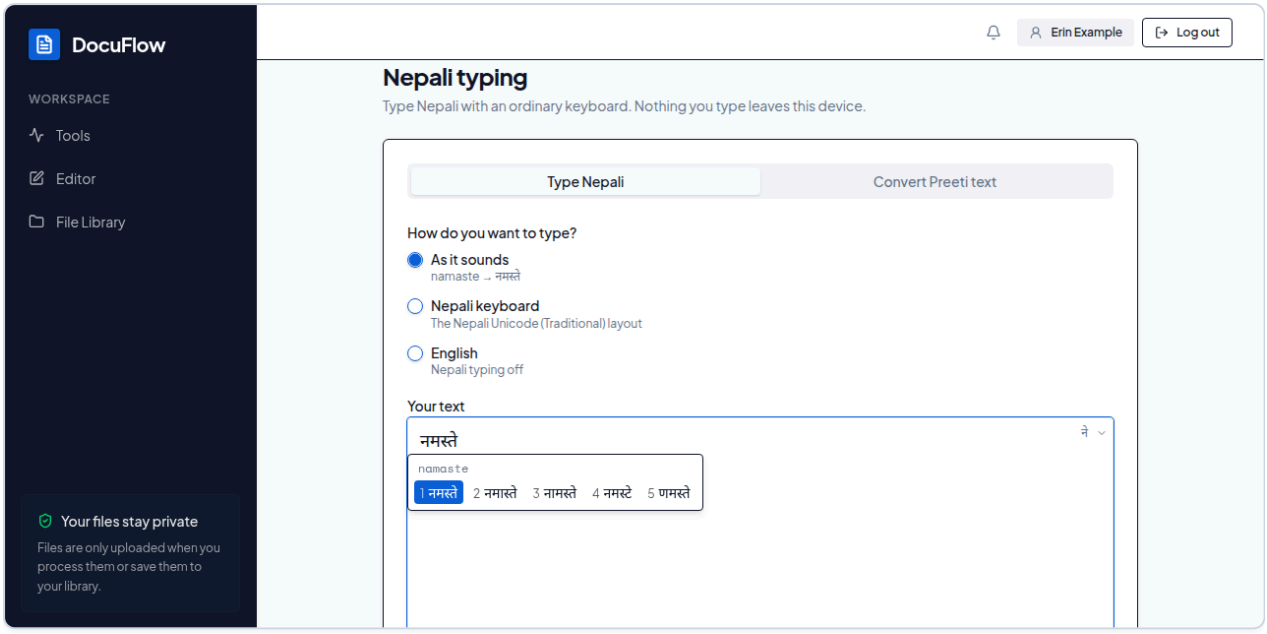

Figure: typing as it sounds — the Nepali word appears while you type, with other spellings to choose from.

Type	To get
aa	◌ा — nepaal → नेपाल
ii	◌ी
T	ट
N	ण
`\`	◌्
`|`	।
M	◌ं
an a between letters	keeps them apart — sarkar → सर्कर, sarakaar → सरकार

Show typing guide lists every letter.

Nepali keyboard: choose **Nepali keyboard** to type with the Nepali Unicode (Traditional) layout. Its letter keys are where Preeti typists expect them; the number keys type Nepali digits (१, २, ३), and Shift gives other letters. Type letters in the order you say them: कि is s, then l. On the keyboard picture, **no join** (`m`) stops two letters joining and **join** (Shift+ `\`) joins them. For - ( ) / : and other signs, switch to English for a moment: select **ने** at the end of the box (or press Ctrl+Space), then **EN** to come back. **Show typing guide** draws the keyboard; **Show Shift keys** shows its Shift layer.

Convert Preeti text

1. Select the **Convert Preeti text** tab.
2. Paste the text into **Preeti text**. Here it looks like jumbled English letters — that is normal.
3. The Unicode text appears in **Nepali (Unicode) text** as you paste or type.

4. Select **Copy Nepali text**, or **Download .txt** to save it as `converted-nepali.txt`.

Only Preeti is supported. Text from other old fonts, such as Kantipur, may come out wrong.

What you'll see when it's done: "Copied" after **Copy** or **Copy Nepali text**. After **Download .txt**: "nepali-text.txt was downloaded. Look in your browser's downloads." (on the desktop app: "Saved nepali-text.txt where you chose."; if you close the save dialog: "Cancelled. The file was not saved."). **Clear** empties the box and shows "Text cleared", with **Undo** to bring it back. Your text isn't saved — copy or download it before you leave the page.

> ⚠ **IF SOMETHING GOES WRONG**
>
> - A word comes out wrong: press Tab or a number to choose another spelling, or type the long vowel (aa, ii, uu) or the capital letter (T, D, N, Sh) yourself. Esc puts back the English letters.
> - A name typed with a capital R starts with ऋ (`Ram` gives ऋअम): press Tab or a number to choose the spelling with र, such as राम, or type a small r.
> - The spelling you want isn't in the list: the list shows at most five spellings, so in a long word it may not be there. Type the word more exactly instead — for example `g\y` gives ग्य, where `gy` gives ज्ञ.
> - "The text couldn't be copied": select the text and press Ctrl+C. "The file couldn't be saved": the message under it says why; try **Download .txt** again.
> - When a phone's keyboard or another input method does the typing: "Your keyboard's own input method is doing the typing here — to type in Nepali, switch that keyboard to Nepali."
> - Converted text looks wrong: it was probably typed in another old font, such as Kantipur, which isn't supported.

Typing in Nepali in any field

The text boxes of letters have the same Nepali typing.

- At the end of the box is a switch: **EN** means you are typing English, **ने** means Nepali. Select it to switch.
- The ▾ beside it chooses how: **As it sounds — namaste → नमस्ते**, **Nepali keyboard (Unicode)** or **English**.
- **Ctrl+Space** switches too: English → as it sounds → Nepali keyboard → English. It is the way to switch from the keyboard: Tab goes straight on to the next box.
- The boxes that have it: the text boxes of a letter's form (Letter templates and Sifarish letters), **Search templates**, and in the builder the **Title in Nepali**, a field's **Label in Nepali**, **Hint under the field (Nepali)** and **Choices, one per line**, the **Value** of a "Show only if…" rule, and the letter's paragraphs, subject, letterhead lines and signature lines. English boxes, numbers and dates don't have it.

- Your choice is remembered on this computer, for every box and the Nepali typing page.
- For one English word while Nepali is on, type it and press Esc.

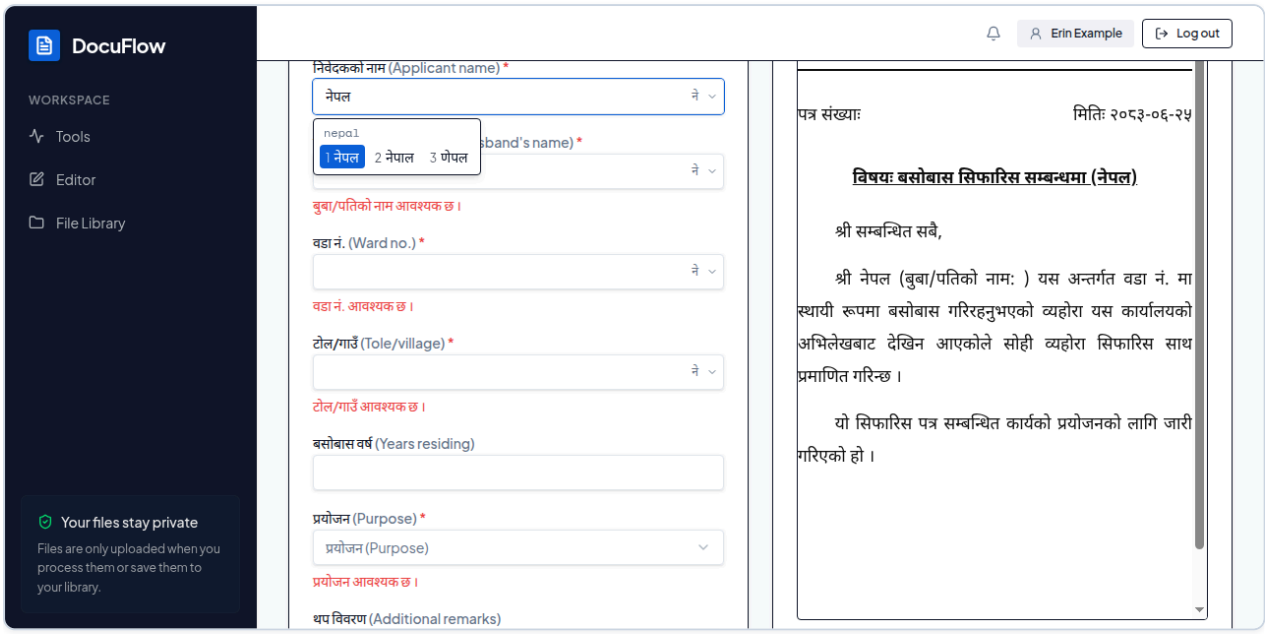

Figure: the ने switch on a letter field — the letter's preview shows the Nepali as you type.

7.5. Letter templates

Fills in an official letter from a template and shows it, laid out on an A4 page, as you type. Your office's templates live in DocuFlow: everyone in the workspace can use the workspace templates, you can make your own, and an administrator can make one of yours a workspace template.

To find it: on the Tools page, open the **Documents** category and select **Letter templates**. The **Sifarish letters** card under **Nepal** opens the same page showing only Sifarish templates.

To make a template of your own, or change one, see Making or changing a template (the builder).

Choosing a template

The page lists templates in up to four groups (a group with nothing in it is not shown):

Group	What is in it
Workspace	Templates your organisation set up for everyone
Shared with me	Templates someone shared with you
Mine	Templates you made
Samples	Example templates that come with DocuFlow, marked **Sample**

Each card shows the title — in Nepali and English when it has both, as "Nepali / English" — the letter's language and who it belongs to. Type in **Search templates** to narrow the list.

> **⚠ IF SOMETHING GOES WRONG**
>
> "No templates match your search." when nothing matches; "The letter templates couldn't be loaded. Try again in a moment." when DocuFlow can't reach the server.

Using a template

To write a letter:

1. Select a template card.
2. Fill in the form under **Fill in the letter**. A required field is marked; a hint under a field gives its help in both languages. To type in Nepali, see Typing in Nepali in any field.
3. Watch the letter in **Preview** — it follows your typing.

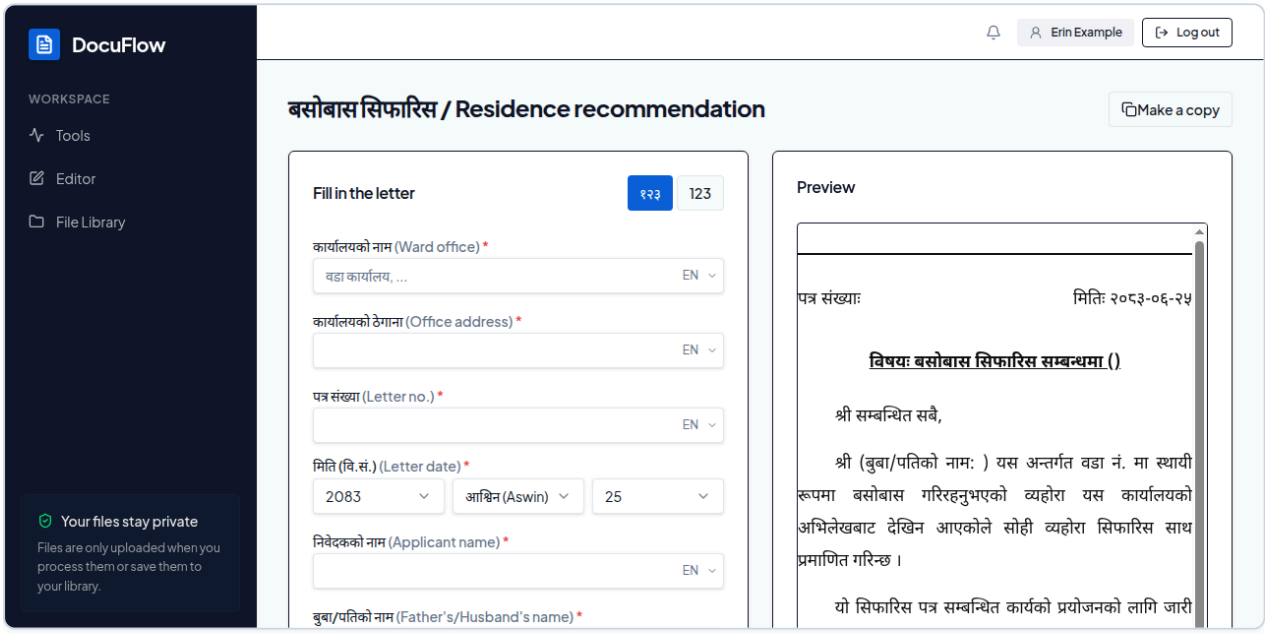

Figure: a template opened — the letter takes shape in the Preview panel as the form is filled in.

4. Choose how the letter number and date are written with the digits toggle: **१२३** (Nepali digits) or **123**. 5. Select **Download PDF**, **Save to library**, or **Print**.

What you'll see when it's done:

- **Download PDF**: "`<name>`.pdf was downloaded. Look in your browser's downloads." (on the desktop app: "Saved `<name>` where you chose."; if you close the save dialog: "Cancelled. The PDF was not saved.").
- **Save to library**: "Saved `<name>` to your file library."
- **Print**: your browser's print dialog, with the letter laid out (on the desktop app: "Print from the window that opened.").

Notes you may see under the preview:

- "Your workspace has no letterhead yet, so this letter has none. An administrator can add one in Admin → Letters."
- "The workspace letterhead couldn't be loaded, so this letter shows without it."
- "The letterhead logo couldn't be loaded, so the letter shows without it."

> ⚠ **IF SOMETHING GOES WRONG**
>
> - Required fields left empty: "Fill in the required fields to enable PDF."
> - The Devanagari typeface is still loading: "Loading Devanagari font…"
> - The server can't be reached: "Download PDF and Save to library each needs the online engine, which is unreachable right now — Print still works offline."
> - The PDF couldn't be made: "The PDF couldn't be made." followed by the reason, or "Try again in a moment."
> - The print window was blocked: "The letter couldn't be opened for printing. Allow pop-ups for DocuFlow and try again."
> - The template was deleted: "This letter template wasn't found. It may have been deleted."

The Devanagari text is set in Noto Sans Devanagari, a font built into DocuFlow — nothing to install.

The two sample templates

DocuFlow comes with two Sifarish samples, बसोबास सिफारिस (residence recommendation) and चालचलन सिफारिस (conduct recommendation). Their wording is an example: make a copy and change it to your office's own text before real use.

Make a copy

Any template you can use can be copied into **Mine**, to change as you like. On the letter page, select **Make a copy** (in the builder it is in the **More** menu).

What you'll see when it's done: "Copy made" — "Change your copy as you like." — and the copy opens in the builder.

> ⚠ **IF SOMETHING GOES WRONG**
>
> "Checking what you can do…" means DocuFlow is still finding out whether you may create templates — wait a moment. "DocuFlow couldn't check what you can do. Try again shortly." means that check failed; it is not a refusal.

7.6. Making or changing a template (the builder)

The builder is where a template is made: the questions the form asks, the words of the letter, and its letterhead and signature. You see the letter take shape beside it as you work, and nothing reaches other people until you save. This section walks through a whole template, start to finish.

To open it:

- For a new template: on the Letter templates page, select **New template**.
- To change a template you may change: open it and select **Edit template**.
- To start from a template you may only use: open it and select **Make a copy** (see Make a copy).

At the top, "Letter templates / New template" (or "Letter templates / Edit template") shows where you are; select **Letter templates** to go back to the list. Beside the title boxes are **Undo**, **Redo** and **Save template**, and the **More** menu (the button with three dots) — for a template that isn't saved yet, **All letter templates** instead. Below them are three tabs, **Fields**, **Letter** and **Letterhead & signature**, and beside the tabs the **Preview** of the letter.

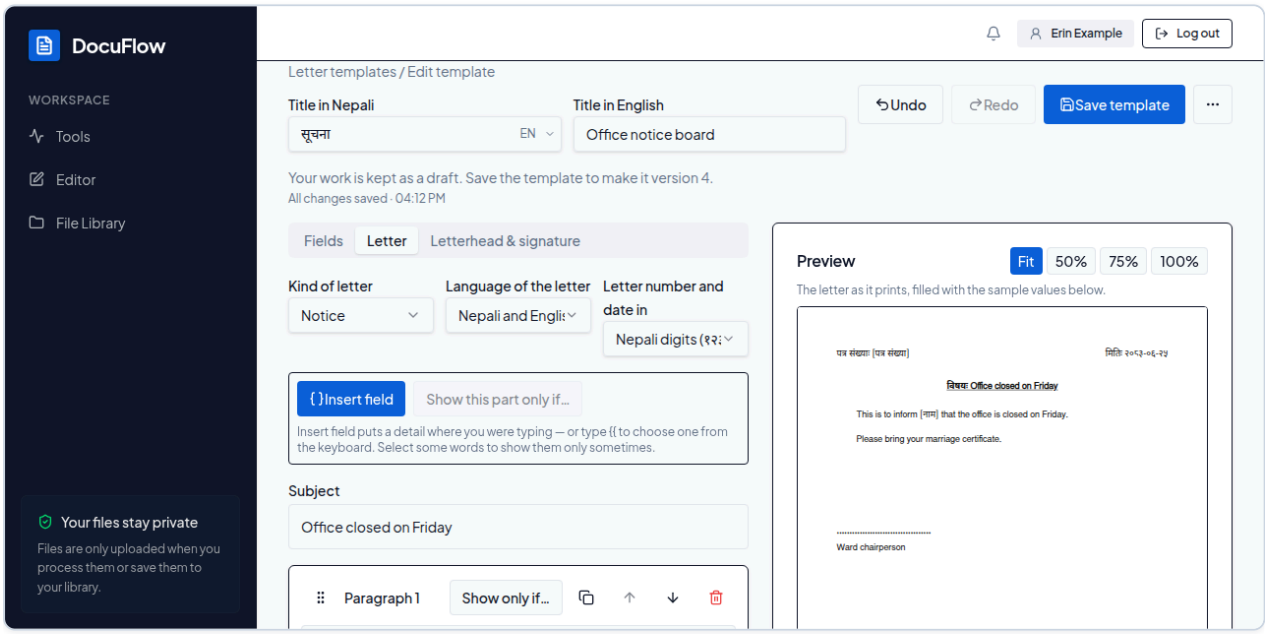

Figure: the builder — the letter on one side, the preview with its Zoom on the other, and "All changes saved" above.

You can do the tabs in any order and come back to each as often as you like. If you are new to it, follow the steps below in order.

Step 1: Name the template

1. Type the title in **Title in Nepali** and **Title in English**. One of them is enough, but people see "Nepali / English" on the template's card when both are filled in. The Nepali box types Nepali (see Typing in Nepali in any field).

2. Choose the **Kind of letter** on the **Letter** tab: **Sifarish**, **Notice**, **Certificate**, **Letter** or **Other**. The **Sifarish letters** card on the Tools page shows only Sifarish templates.

A new template is not empty. It starts with two fields every office letter needs — **Letter no.** (पत्र संख्या) and **Date** (मिति), both marked **Must be filled in** — one empty paragraph, the **Workspace letterhead** and a signature block. Its **Kind of letter** is **Letter**, its **Language of the letter** is **Nepali**, and its **Letter number and date in** is **Nepali digits (१२३)**. Change any of these as you go.

Until you change something, the line under the title says "Give the template a title and write the letter, then save it."

Step 2: Choose the details the form asks for (the Fields tab)

"Fields are the details that change in each letter — a name, a date, an address. The person writing a letter fills them in." Each field is a card on the **Fields** tab, and a box in the form under **Fill in the letter** when someone uses the template.

To add a field:

1. Open the **Fields** tab and select **Add a field**.
2. Choose what kind of answer it takes. You can change it later with **Type**.

Type	What the person writing the letter gets
Short text	A one-line box — a name, a ward number, a place
Long text	A box of several lines — an address, a reason
Number	A box that takes only a number
Choice from a list	A list to pick one answer from
Yes or no	Two buttons, **हो / Yes** and **होइन / No**
Date (Bikram Sambat)	A year, a month and a day to pick, in Bikram Sambat
Date (AD)	A date to pick, in AD

3. The new card appears at the end, called "New field" (नयाँ फिल्ड), with the cursor in **Label in Nepali**. Type the label in Nepali, then in **Label in English**. The label is the question on the form, so write it the way you would ask it: "Applicant's name", not "name1".
4. If the letter makes no sense without it, turn on **Must be filled in**. Nobody can download or save the letter until every such field is filled in ("Fill in the required fields to enable PDF.").
5. For **Choice from a list**, type the answers in **Choices, one per line** — one answer on each line. The box starts with two examples, पहिलो and दोस्रो; replace them with your own.
6. Optionally, write **Hint under the field (Nepali)** and **Hint under the field (English)** — a short help line shown under the box, for example "As written on the citizenship certificate".

What you'll see when it's done: the card's heading shows the English label and the type ("Purpose · Choice from a list"), and the field appears under **Sample values** beside the preview.

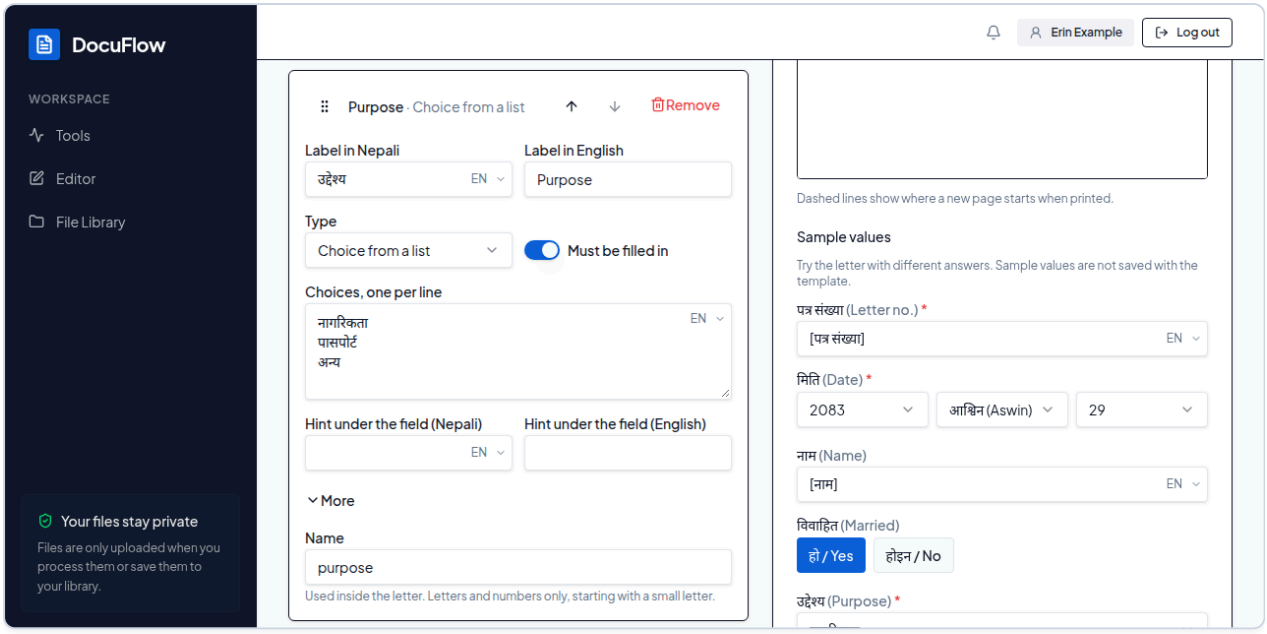

Figure: a list field filled in — the new field also appears at the bottom of the Sample values.

Its name (under More). Select **More** on a card to see its **Name** — a short word DocuFlow uses inside the letter to know which field is which ("Used inside the letter. Letters and numbers only, starting with a small letter."). A new field is called newField; you never have to change it, but a clear name such as purpose makes a long template easier to look after. Type the new name, then press Enter or leave the box. Every place in the letter that uses the field follows, and the card says how many: "Renamed in 3 places in the letter." A name that won't do is refused, with the reason under the box: "This name can't be used. Use letters and numbers only, starting with a small letter." or "Another field already has this name."

Moving and removing fields. The order of the cards is the order of the boxes on the form. To move a card, drag it by its grip (the dotted handle beside its name), or use the up and down arrow buttons on it (**Move `<name>` up**, **Move `<name>` down**). **Remove** takes a field away at once — if the letter still uses it, the list above the tabs says which paragraph, and **Undo** brings the field back.

A template can have up to 60 fields; after that **Add a field** is greyed out. With no fields at all, the tab says "No fields yet — select Add a field to make one."

Step 3: Write the letter (the Letter tab)

To set up the letter:

1. Open the **Letter** tab.
2. Choose the **Kind of letter** (see Step 1) and the **Language of the letter**: **Nepali**, **English** or **Nepali and English**.
3. Choose how the letter number and date are written, in **Letter number and date in**: **Nepali digits (१२३)** or **English digits (123)**. The person writing a letter can still switch this for their own letter.
4. Type the **Subject** in its box ("What the letter is about").

5. Type the first paragraph in the box under **Paragraph 1**. Select **Add a paragraph** for each further paragraph; it goes at the end. A template can have up to 80 paragraphs.

The text boxes of the letter type Nepali too: the **EN / ने** switch appears at the end of the box you are typing in (see Typing in Nepali in any field).

To put a field in the text — the part that changes in each letter, such as the applicant's name:

1. Click in the text exactly where the detail should go.
2. Select **Insert field** (in the toolbar above the subject) and choose the field. Or, without leaving the keyboard, type `{{` right there: "Insert a field" opens under the box. Type a few letters in **Find a field** to narrow the list (by either label or the field's name), use ↑ and ↓, and press Enter — or click the field. Esc or Tab closes the list and leaves the `{{` as you typed it.

What you'll see when it's done: the field sits in the text as a grey chip with its label, and the preview shows its sample value in that place.

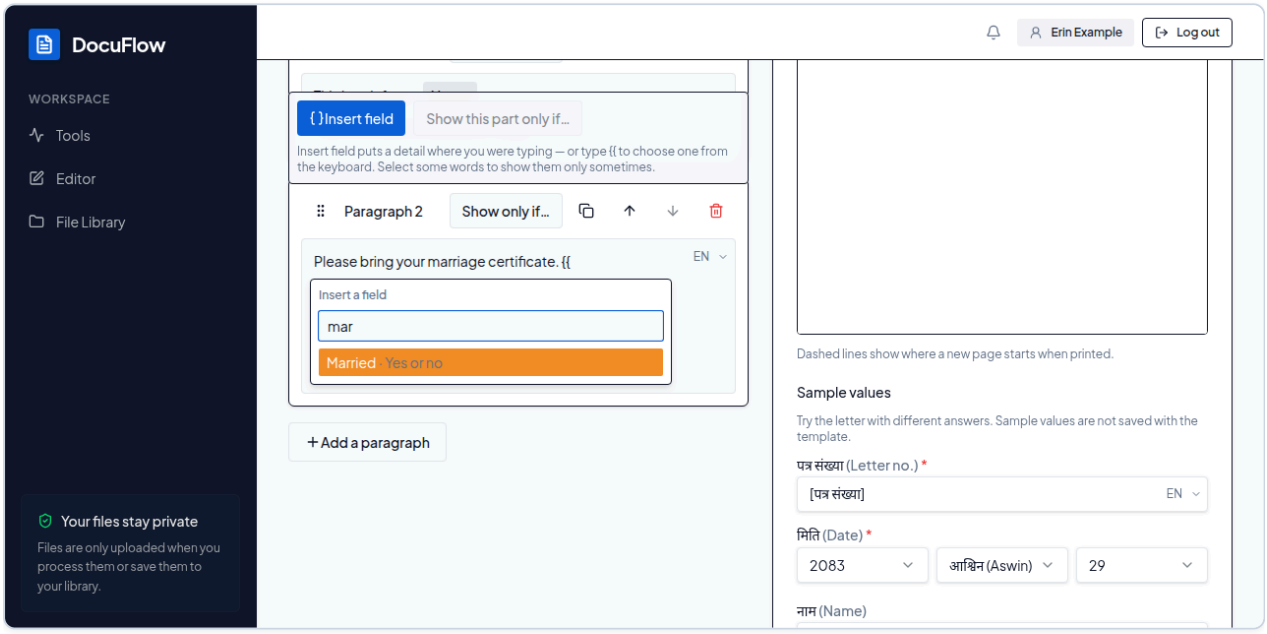

Figure: typing `{{` in a paragraph — the list narrows as you type, and Enter puts the highlighted field in.

- With no fields yet the list says "No fields yet. Add one in the Fields tab."; when nothing matches what you typed it says "No field matches “ `<what you typed>` ”."
- With **Nepali keyboard (Unicode)** on, `{` types ऱ् instead: switch to **EN** first (Ctrl+Space), or use **Insert field**. With **As it sounds**, `{{` works as it is.
- The toolbar's own line says what it will do: "Insert field puts a detail where you were typing — or type {{ to choose one from the keyboard. Select some words to show them only sometimes."

To choose how a field is written: select its chip. Under "Write it as", choose **As typed**, **Nepali digits (१२३)**, **English digits (123)**, **CAPITAL LETTERS**, and for a date **Date in words (२०८१ भाद्र १२)** (Bikram Sambat dates) or **Long date (3 October 2026)** (AD dates). The chip then shows the choice after its label. **Remove** in the same list takes the chip out; so does Backspace or Delete

while the chip is selected. A chip whose field was removed turns red and says "Missing field" — select it: "This field was removed. Remove it here too, or add the field again."

To print a paragraph only in some letters — for example, "Please bring your marriage certificate." only when the applicant is married:

1. On that paragraph, select **Show only if…**. A box opens: "Show only if…" — "Choose when this part of the letter is shown. Otherwise it is left out."
2. Choose the field (for example **Married**).
3. Choose the rule. For a **Yes or no** field: **is Yes** or **is No**. For any other field: **is filled in**, **is left empty**, **is** or **is not** — for the last two, also choose or type the answer to compare with.
4. Select **Apply**.

What you'll see when it's done: the paragraph says "Shown only if Married is Yes", its button now reads **Change rule**, and **Always show** takes the rule off again. Letters where the rule doesn't hold leave the paragraph out.

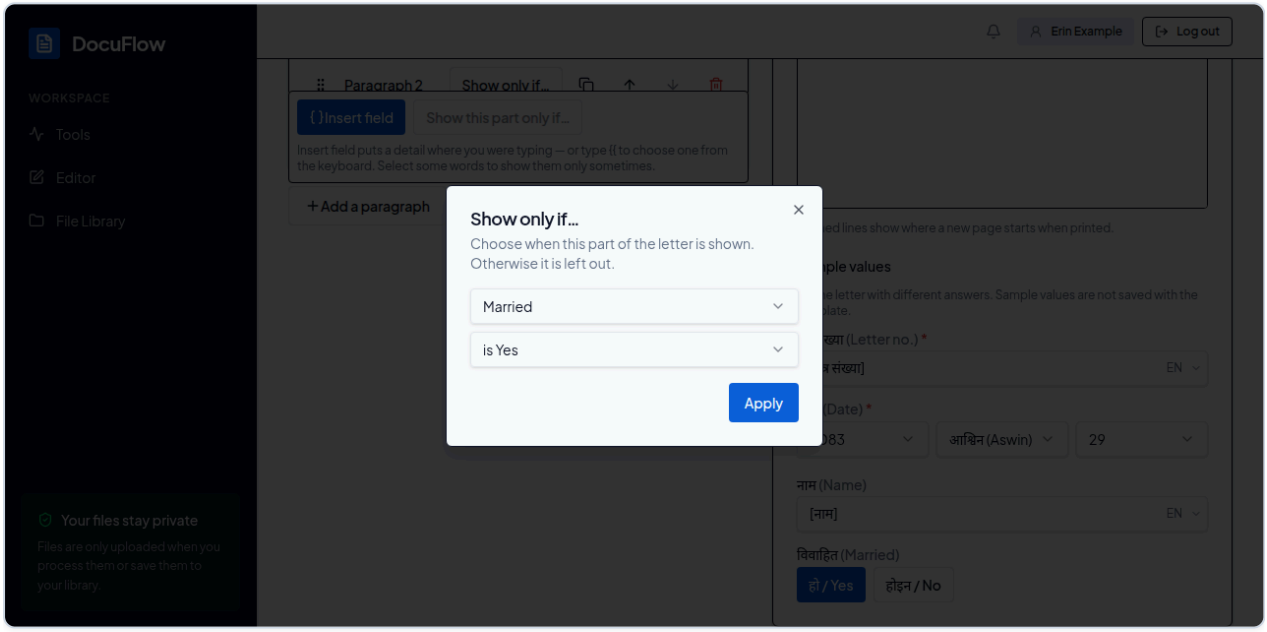

Figure: a rule for paragraph 2 — it is printed only in letters where Married is Yes.

To print only some words sometimes: select the words in the text, then select **Show this part only if…** in the toolbar ("Choose when the selected words are shown.") and choose the rule the same way. The words get a dashed border headed "Shown only if …", with **Change rule** and **Remove the rule, keep the words**. A rule can sit inside one other rule, not deeper: "These words are already inside two rules — a rule can only be inside one other. Select words outside the inner rule." With no fields yet, the box says "Add a field first, then choose when this shows."

To check a rule, change the answer under **Sample values** beside the preview (for example select **होइन / No**) and watch the part leave the letter.

Copying, moving and removing paragraphs:

- The copy button on a paragraph (**Duplicate paragraph** `<n>` — the name shows when you point at it) adds a copy of it, rule included, right after it.
- To move a paragraph, drag its card by the grip (the dotted handle beside "Paragraph `<n>`"). From the keyboard, focus the grip, press Space, move with the arrow keys and press Space again (Esc cancels) — or use the up and down arrow buttons on the card (**Move paragraph** `<n>` **up**, **Move paragraph** `<n>` **down**).
- The bin button (**Remove paragraph** `<n>`) removes it at once; **Undo** brings it back.

With no paragraphs at all, the tab says "This letter has no paragraphs yet — select Add a paragraph to start writing."

Step 4: Choose the letterhead and signature

Open the **Letterhead & signature** tab. Under **Letterhead**, choose one:

- **Workspace letterhead** — "The one your administrator set up for everyone." It changes for every template at once when the administrator changes it.
- **Our own letterhead** — "A logo and lines just for this template."
- **No letterhead** — "For printing on paper that already has one."

To make your own letterhead:

1. Select **Our own letterhead**.
2. To add a logo, select **Upload logo** and choose the image ("A PNG or JPEG image, up to 1 MB."). **Change logo** replaces it; **Remove logo** takes it off.
3. Type the office name in **Line 1 (office name)**. Select **Add a line** for up to four lines; the bin button beside a line (**Remove letterhead line** `<n>`) removes it.
4. Type the **Address** and the **Phone, e-mail or website** line.
5. Choose **Centre** or **Left** for how the letterhead sits on the page.

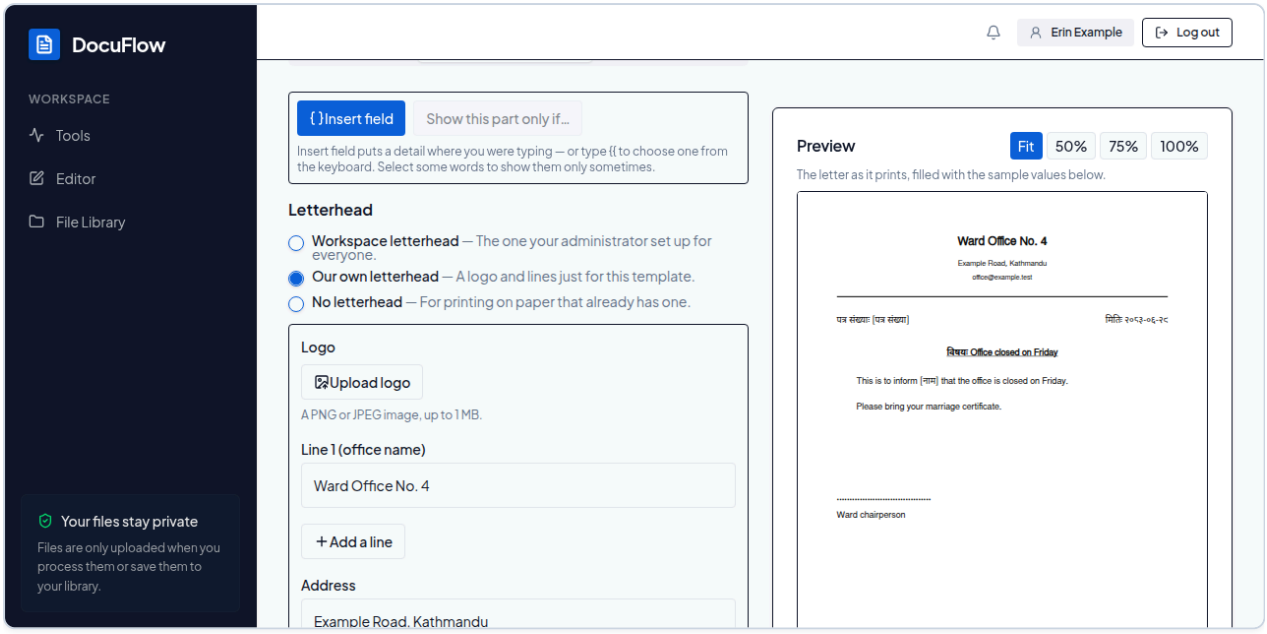

Figure: your own letterhead — each line appears at the top of the preview as you type it.

A field can go into a letterhead line or a signature line too: click in the line, then use **Insert field** at the top of the tab, or type `{{`. Until you have clicked in one, the toolbar says "Click where the field should go, then choose Insert field."

The signature:

1. Keep **Include a signature block** on (turn it off for a letter without one).
2. Type the **Name** of the person who signs. "Leave the name empty to print a line to sign on." — useful when different people sign.
3. Type their **Title** (for example वडा अध्यक्ष) and **Office**.
4. Turn on **Leave space for a seal** if the letter is stamped.

Step 5: Check the letter in the preview

The **Preview** is "The letter as it prints, filled with the sample values below." It follows every change at once.

- **Sample values** (under the preview) holds an answer for each field, so the letter reads like a real one: a text field shows its label in brackets, such as "[नाम]", a list its first choice, a date today's date. Change them to try the letter with different answers. "Try the letter with different answers. Sample values are not saved with the template."
- **Zoom**, above the preview: **Fit** (the page as wide as the preview), **50%**, **75%** or **100%**. DocuFlow remembers your choice on this device.
- "Dashed lines show where a new page starts when printed." — a line marked "Page 2" shows where the letter goes onto a second sheet. The lines never print.
- On a phone, **Undo**, **Redo**, **Save template** and **Preview** sit in a bar at the bottom of the screen. **Preview** shows the letter instead of the tabs; select **Back to editing** to return.

Notes you may see under the preview:

- "Your workspace has no letterhead yet, so the preview has none. An administrator can add one in Admin → Letters."
- "The workspace letterhead couldn't be loaded, so the preview shows without it."
- "The letterhead logo couldn't be loaded, so the preview shows without it."
- If the Devanagari typeface couldn't be loaded, a red note says so; select **Retry**.

Step 6: Save a version

You never lose work by not saving: the builder keeps a draft as you go (see Drafts and conflicts). Saving is what makes the template usable. Each save makes a new numbered **version** — version 1, version 2, and so on. Letters are always written from the newest saved version; a draft is never used for a letter, and nobody else sees it. Every older version is kept, so you can look back at it or bring it back (see Version history, sharing and deleting).

Before you save, the line under **Save template** says what saving will do: "Your work is kept as a draft. Save the template to make it version `<n>`." (for a new template: "Your work is kept as a draft. Save the template to start using it."). With nothing changed it says "No changes since the last saved version."

To save:

1. Select **Save template**.
2. A box opens: "Save your template" — "Your template is saved in this workspace, ready to write letters with." for a new template, or "Save a new version" — "The template keeps every version, so you can go back to this one later." otherwise.
3. Optionally, write what you changed in **What changed? (optional)**, up to 500 characters — it is shown in the version history.
4. Select **Save template** in the box (or **Cancel**).

What you'll see when it's done: "Saved — version `<n>`" — "Your template is ready to write letters with." — with **Use this template**, which opens the letter page. The line under **Save template** says "Saved — version `<n>`." with the same link.

When Save template is greyed out, the line under it says why:

- "Fix what is listed below, then save." — the list "Fix these before saving:" above the tabs names each problem, the same sentence appears beside the part it is about, and a red dot marks the tab. A new, untouched builder shows no problems; they appear once you start editing.
- "No changes since the last saved version."
- "Choose Restore or Discard above first." — answer the "Restore your unsaved changes?" question first (see Drafts and conflicts).
- "Checking what you can do…" — DocuFlow is still finding out whether you may create templates; wait a moment.

- "Your workspace doesn't let you create templates. Ask an administrator."
- "You switched to another workspace. Switch back to the one you opened this template in to save it."

Undo and redo. Undo and **Redo** (next to **Save template**) take back a change and bring it back; the keys are Ctrl+Z and Ctrl+Shift+Z (or Ctrl+Y) — ⌘Z and ⇧⌘Z on a Mac. A burst of typing comes back as one step. Saving keeps your undo history; opening a template starts a new one.

7.7. Drafts, versions and sharing

Drafts and conflicts

You never need to save a draft yourself. A couple of seconds after each change, the builder keeps your work as a draft — on this device and in your account, so it follows you to another computer. **Save template** is still what makes the numbered version that letters are written from. The line under the title says where your draft is:

- "Saving…" while it is being kept, then "All changes saved · `<time>`".
- "Saved on this device · `<time>` — will sync when you're back online" when there is no connection; it goes to your account by itself once you are back.
- "Couldn't save your draft — your changes are kept on this device." when DocuFlow's server could not take it; it tries again by itself.
- "Saved on this device · `<time>`" for a template that only exists on this computer so far.
- "Couldn't save your draft — keep this page open until it can be saved." when it could not be kept anywhere — keep the page open and it tries again.
- "Your draft was also changed somewhere else — choose which to keep below." when another computer (or another tab) changed the same draft meanwhile — see below.

If you open a template that has a draft — left on this device, or in your account from another computer — the builder asks "Restore your unsaved changes?", for example "You have changes from Chrome on Windows, 5 minutes ago, that aren't in a saved version yet. Until you choose, new changes are not kept as a draft." Select **Restore** to carry on with them or **Discard** to throw them away; until you choose, **Save template** stays off and says "Choose Restore or Discard above first." If the template was saved again since the draft began, it adds "They started from version `<b>`; the template is now at version `<v>`.", and saving then meets the choice below. When this device and another computer each have different changes, it offers both: **Restore from `<that computer>`**, **Restore from this device** or **Discard both**.

If the same draft is changed on another computer while you are editing here, the builder says "Your draft was changed on `<that computer>` at `<time>` while you were editing here." — or, when it was another tab or window of this browser, "Your draft was changed in another tab or window at `<time>` while you were editing here." Select **Keep my changes** to keep yours, or **Use the other changes** to continue with theirs.

Only you see your drafts — not even administrators can open them. A draft you leave untouched for 90 days is removed.

If someone saved a newer version while you were editing, Save says so instead of writing over it: "Someone saved a newer version (version `<n>`) while you were editing." — "Your changes were not saved over it. Keep them as a copy of the template, or discard them and open the newer version." Select **Keep mine as a copy** (your work becomes a new template of your own, called " (my changes)"; "Your changes are in “ `<title>` ”" — "The newer version of the original is unchanged.") or **Discard my changes** (open the newer version: "Your changes were discarded" — "You are looking at version `<n>`."). The same choice appears if the template was deleted, or you can no longer change it, while you had it open: "This template was deleted while you were editing it." / "You can no longer change this template." — "Your changes were not saved. Keep them as your own copy, called “(my changes)”, or discard them."

If your sign-in ends while you are saving, nothing is lost: sign in again and open the template, and it offers your unsaved changes.

Version history, sharing and deleting

These are in the builder's **More** menu. Each needs an internet connection ("Needs a connection" otherwise).

- **History** opens "Version history" — "Every save is kept. Look at an older version, then bring it back if you want it." Each row shows "Version `<n>`", the day and who saved it, and the note written when saving. Select **Preview** on a row to see that version's letter; the newest says "This is the current version". Select **Restore this version** to save it again as the newest version: "Restored — saved as version `<n>`". If you have changes that aren't saved yet, restoring a version replaces them and deletes your draft — the panel says so first: "You have changes that aren't in a saved version. Restoring a version replaces them and deletes your draft."
- **Share** opens "Share this template" — "People you add can find it under “Shared with me”. “Can edit” lets them save new versions." Find a colleague under **Add a person**, choose **Can use** or **Can edit** for each, and select **Save** ("Shared with `<n>` people"). **Remove** takes someone off. With nobody added, it says "Only you can use this template."
- **Make a copy** — see Make a copy.
- **Delete template** asks first: `Delete “<title>”?` / "People it is shared with lose it too." Select **Delete template** ("Template deleted"), or **Keep it**.
- **Use the saved template** opens the letter page with the last saved version; **All letter templates** goes back to the list.

Proposing a template for the whole workspace

If you made a template that everyone should use, propose it to your administrators.

To propose:

1. In the builder, open **More** and select **Propose for the workspace**. The box says "An administrator looks at the saved template and, if they agree, adds it to the workspace templates everyone can use."
2. Optionally write **A note for the administrators (optional)**, up to 500 characters.
3. Select **Send proposal**.

What you'll see when it's done: "Proposed" — "Sent to your administrators. You'll see their answer here." — and **Done**. The builder shows "Proposed for the workspace on `<date>` — waiting for an administrator." with **Withdraw** to take it back ("Proposal withdrawn"); meanwhile the menu item says "Already proposed". You get a notification when it is approved or declined (with the reason). The proposal is of the saved template — save first if you want your latest changes included; with changes not saved yet, the box adds "Changes since the last saved version are not included — save the template first if you want them to be."

An administrator sees **Add to workspace templates** instead, which adds the template at once: "Added to workspace templates", with **Open**.

Exporting and importing a template

- **Export** (in **More**) saves the template as a `.docuflow-template.json` file, to keep or to give to another DocuFlow office. "Template exported", with the file name. Export takes the last saved version.
- **Import a template** (on the Letter templates page) makes a new template of your own from such a file, and opens it in the builder. "Template imported" — "Look it over, then save it to keep it." A logo can't travel in a file: "The logo wasn't included in the file. Add it again under Letterhead."

> **⚠ IF SOMETHING GOES WRONG**
>
> "That file couldn't be imported", with the reason — for example "This file isn't a DocuFlow letter template, or it is damaged.", "This template was made by a newer version of DocuFlow. Update DocuFlow to open it.", or "The template is too large. Remove some fields, choices or text."

On the desktop app

- Templates you have opened before, the workspace letterhead and its logo are kept on this computer, so you can write letters with them offline. "This template isn't saved on this computer yet. Connect to the internet to open it once." means it was never opened here.
- You can create and change your own templates offline. Saving says "Saved on this computer" — "It goes to your workspace the next time you are online."
- If your offline change can't go onto the template when you reconnect, it is kept as a copy called "(my changes)" and a message says why: someone else changed the template, it was deleted, or you can no longer change it — "Nothing was lost."

- If the server refuses a change for another reason: "A template change could not be saved", with the reason and "Your version is still kept on this computer."
- Workspace templates can be used offline but not changed: "Workspace templates can only be changed while you are online." The builder says so before you start, and adds "You can keep editing — your changes are kept on this device until you can save."
- A new template needs DocuFlow to have checked, online, that you may create templates: "You're offline, so DocuFlow can't check that you may create templates here. Your work is kept on this device; save it once you're connected."
- Drafts are kept on this computer while you are offline ("Saved on this device · `<time>` — will sync when you're back online") and go to your account when you reconnect.

7.8. If something goes wrong in the builder

⚠ IF SOMETHING GOES WRONG

Opening a template:

- "This letter template wasn't found. It may have been deleted." or "This letter template couldn't be opened. Try again in a moment." — select **Back to letter templates**.
- "You can use this template but not change it." — you may write letters with it (**Use this template**); to change it, make a copy ("A copy is yours to change.").

What the "Fix these before saving:" list may say. Each sentence also appears beside the part it is about. In them, `<n>` is the number of the field or paragraph, `<field>` the field's label and `<name>` its name:

- Give the template a title.
- Field `<n>` needs a label.
- Two fields are called "`<name>`". Give each field its own name.
- Field "`<field>`" is a list with no choices. Add at least one choice.
- Field "`<field>`" lists the choice "`<choice>`" twice.
- Field "`<field>`" has an empty or too long choice. — or: Field "`<field>`" has more than 50 choices.
- Field "`<field>`" has a label, hint or placeholder that is too long.
- Paragraph `<n>` uses a field that no longer exists: `<name>`. — the same for The subject, a letterhead line or a signature line. Put the field back with **Undo**, or remove the red chip.
- Paragraph `<n>` has a "Show only if" rule about a field that no longer exists: `<name>`.
- Paragraph `<n>` has a "Show only if" rule with nothing to compare "`<field>`" with.
- Paragraph `<n>` compares "`<field>`" with "`<answer>`", which isn't one of its choices. — a choice was changed after the rule was made; choose the rule again.
- Paragraph `<n>` writes "`<field>`" as a Nepali date in words, but it isn't a Bikram Sambat date field. — or: Paragraph `<n>` writes "`<field>`" as a long English date, but it isn't an AD date field. The field's **Type** was changed; choose another **Write it as** on the chip.
- Fill in your own letterhead, or choose another letterhead option. — or: The letterhead needs between 1 and 4 lines.
- The template's title is too long. Keep it under 200 characters. — or: The template has too much text. Keep it under 20,000 characters.
- There are more problems. Fix these first, then check again.

Saving:

- "The template couldn't be saved.", with the reason, or "Try again in a moment."
- "The template couldn't be saved. Check it and try again." in the list above the tabs — DocuFlow's server found a problem the builder didn't.

- "You're offline, so DocuFlow can't check that you may create templates here. Your work is kept on this device; save it once you're connected."
- For a newer version, a deleted template, or one you may no longer change, see Drafts and conflicts.

The letterhead logo:

- "Choose a PNG or JPEG image." / "Choose a PNG or JPEG image under 1 MB." / "The image is too large. Use one up to 4000 × 4000 pixels."
- "The logo couldn't be uploaded. Try again in a moment."
- "The logo couldn't be shown here. It is still part of this letterhead."

The More menu:

- "Your copy couldn't be made." / "A copy couldn't be made." / "That version couldn't be restored." / "The template couldn't be exported." / "The newer version couldn't be opened." / "The proposal couldn't be withdrawn." / "It couldn't be added to the workspace templates." — each with the reason, or "Try again in a moment."
- "The other changes couldn't be opened." — "They may have been saved or discarded on the other device.", or the reason.
- "The proposal changed while it was being added. Try again."

8. Files

The Files page is where DocuFlow keeps files you've uploaded or that others have shared with you. It is for anyone who wants to come back to a file later, hand it to someone else, or check who else can see it.

Before you start

You need to be signed in — the Files page is part of the signed-in workspace, reached from **File Library** in the sidebar. Its heading on screen is "File Library", with the line "Manage and access your stored operations assets."

The tabs

Files are split into tabs:

- **Mine** — files you own.
- **Shared with me** — files someone else shared with you.
- **Organization** — files shared with everyone in your organisation.
- **Archive** — administrators only. Documents kept behind when someone's account was removed from your login system, rather than deleted with it (see For administrators).

To switch views: select the tab you want. Each tab opens at the top of its folders, **Library**.

What you'll see when a tab is empty:

- With a search or filter active: "No files match your filters."
- **Shared with me**, nothing shared: "Nothing has been shared with you."
- **Organization**, nothing shared: "Nothing is shared with the organization yet."
- **Mine**, nothing uploaded: "You haven't uploaded anything yet."
- **Archive**, nothing archived: "Nothing is archived. When someone's account is removed, their files show up here."
- A folder with no files and no folders in it: "This folder is empty."

Tips

- A row's buttons tell you your own rights on that file — no Share button means you can't share it, no Delete button means you can't delete it.
- The link icon only shows up when a public link is both active and something you're allowed to manage — its absence doesn't always mean there's no link, just that you can't control it.

- A public link works for anyone who has it, with no sign-in required, so only make one public when that's really what you want.
- If you see "The file was changed by someone else; reload and try again.", someone else touched the file first — look at the row again before retrying your change.
- Open the right folder before you upload and the files land there — no moving afterwards. You can always move a file later with **Move to…**, or change its tags with **Edit metadata**.
- Dragging is a shortcut, not a requirement: **Move to…** does the same with a keyboard or on a phone.
- The **Organization** tab is where to check what your whole organisation can already see, before you decide whether a file needs sharing more narrowly.

8.1. Folders

You can keep files in folders, and folders inside folders, the way you do on your computer. The top of your folders is called **Library**.

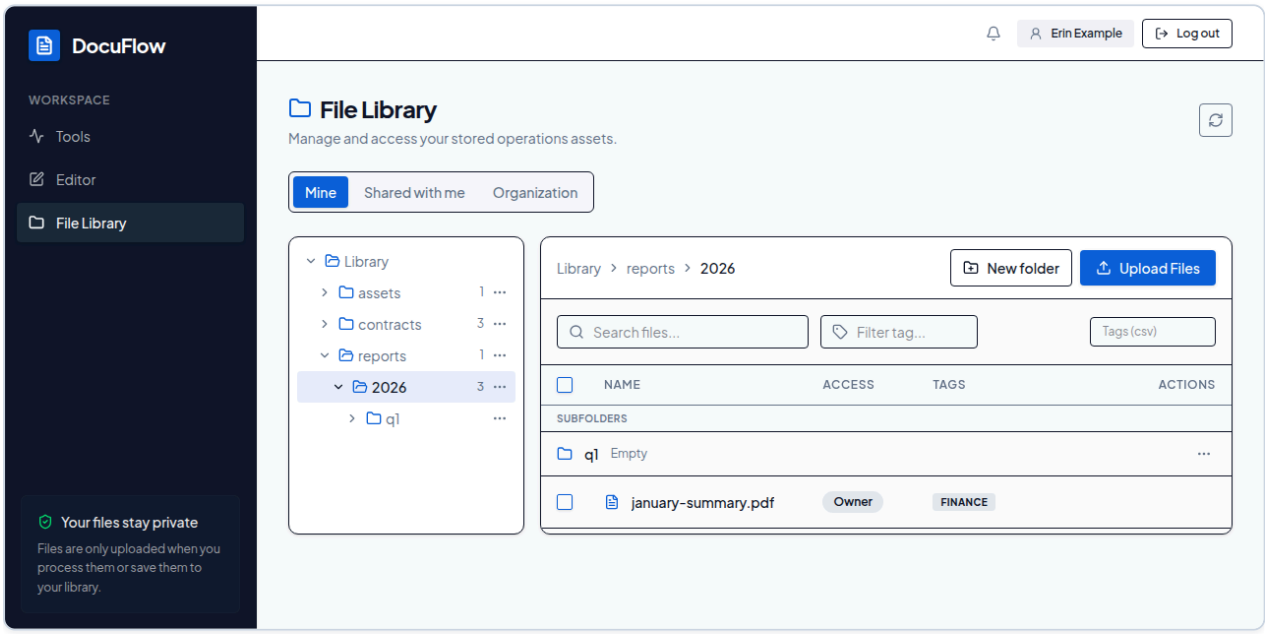

Figure: folders on the left, the open folder's files on the right.

- On **Mine**, **Shared with me** and **Organization**, the folders are listed on the left (on a laptop-sized screen or wider). Select a folder to open it; select the small arrow beside a folder to show or hide the folders inside it. The number beside a folder is how many files are directly in it.
- Above the table, the path of the open folder reads like **Library** › reports › 2026. Select any part of it to go back up.
- The table starts with the open folder's own folders, under "Subfolders", each saying what it holds — for example "2 files · 1 folder", or "Empty". Select one to open it. Its files come after them.

- Your browser's Back button returns to the folder you were in before, and the address in your browser opens that same folder again — you can bookmark a folder or send its link to a colleague (they see only the files they're allowed to see).
- With the keyboard, in the list of folders: the up and down arrows move between folders, the right arrow shows a folder's folders (and goes into them), the left arrow hides them (or goes up), and Enter opens a folder.
- On screens narrower than a laptop (phones and tablets) the list is hidden: select **Folders** beside the path to open it from the bottom of the screen; opening a folder closes it again. On a phone, a long path keeps its first part and the last two, and **…** lists the folders in between.
- **Archive** has no folders: it lists everything kept behind, grouped by former owner, as described in The Archive tab.
- A folder saved by an older version of DocuFlow under a name today's rules don't allow, or would write differently (for example one with a backslash, `Clients\Acme`, or one starting or ending with a space or a /), shows at the top of the list under that name, exactly as it was saved. You can open it and move its files somewhere else, but you can't rename it, delete it, make folders inside it or move files into it — and files you upload while it's open go to **Library**.

When there are no folders yet, the list says "No folders yet — create one with New folder." on **Mine** and "No folders here." on the other tabs. In a very large library it may also say "Some folders may not be listed. Use Search to find a file."

To make a folder:

1. On **Mine**, open the folder the new one should go in — or stay at **Library** for the top.
2. Select **New folder**. The "New folder" dialog says where it goes: "It goes inside `<folder>`." or "It goes at the top of your library."
3. Type its name under **Folder name** and select **Create folder** (it stays greyed out until you type a name).

What you'll see when it's done: the dialog closes, the new folder appears in the table, and the line above the table reads "Created folder " `<name>` "."

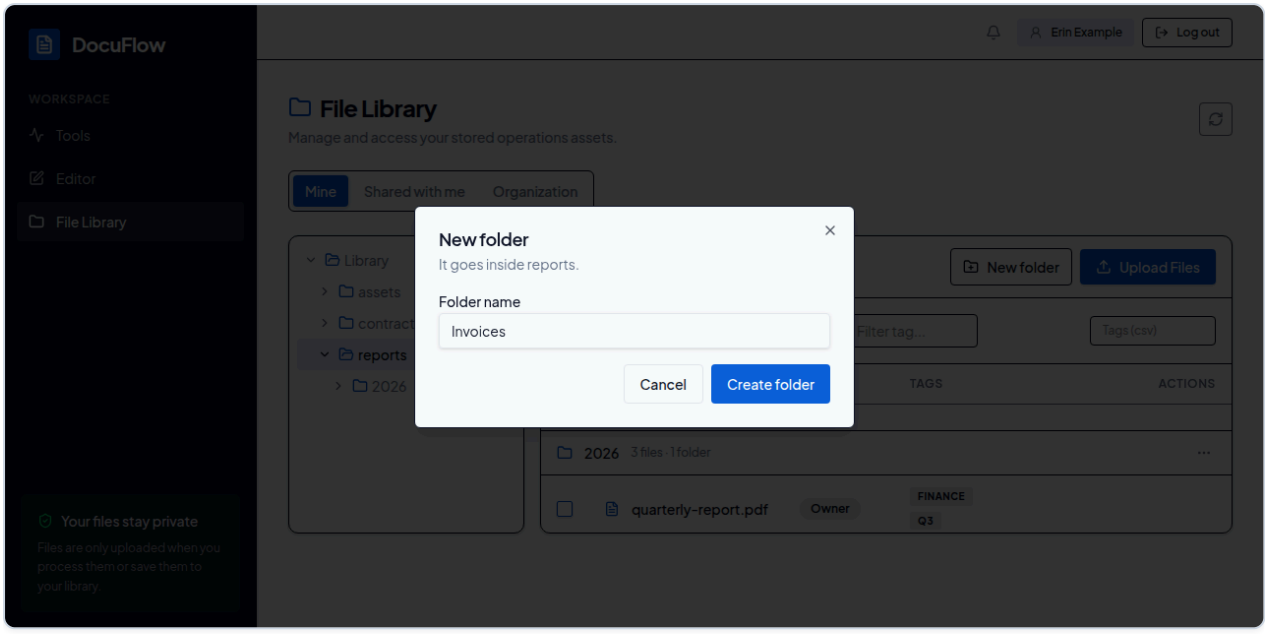

Figure: making a folder inside the one you have open.

To move files:

1. Tick the box at the start of each file's row — or the box at the top of that column, "Select all files on this page". A bar takes the place of the search boxes: "`<number>` selected", with **Move to…**, **Delete** and **Clear**.
2. Select **Move to…**. For a single file you can also use the **Move to…** button (the folder with an arrow) on its row. The dialog's title says what is moving: "Move 3 files", or "Move "contract.pdf"" for one file.
3. Select the folder the files should go to. The folder they are in now is marked "Already here" and can't be chosen. The line "Destination: Library › …" shows exactly where they will go. Select **New folder** to make a folder inside the one you selected; it's selected for you.
4. Select **Move here**.

You can also drag a file onto a folder in the list on the left, or onto a folder row in the table: the folder lights up and says "Move to `<folder>`" — let go to move it there. If the file is ticked, all the ticked files go with it. Dragging does exactly what **Move to…** does, and **Move to…** works with a keyboard or a touch screen.

What you'll see when it's done: the files leave the table and the line above it reads, for example, "Moved 3 files to reports/2026." If some files stayed where they were, the line adds why:

- "1 wasn't moved because you can't edit it." (or "2 weren't moved because you can't edit them.")
- "1 is no longer in your library." — it was deleted, or is no longer shared with you.
- "1 was changed by someone else; reload and try again."

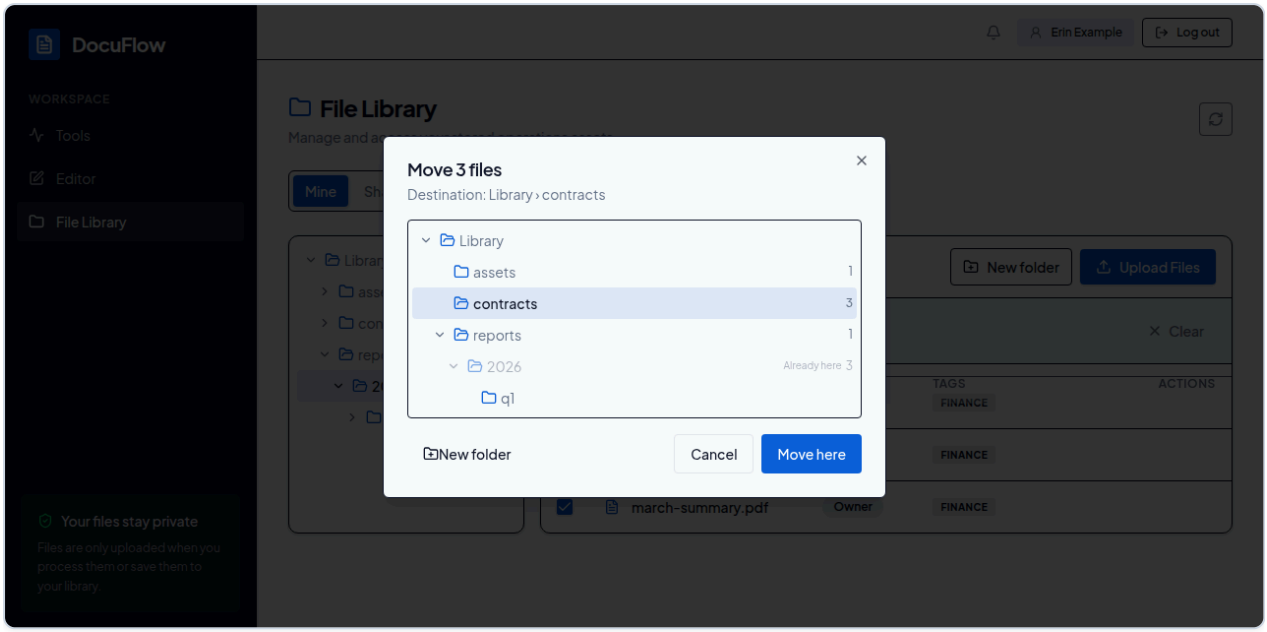

Figure: choosing where three selected files go.

To delete several files at once: tick them and select **Delete** in the bar. You're asked "Delete 3 files? This can't be undone." When it's done: "Deleted 3 files." — or, if one couldn't be deleted, "Deleted 2 files. 1 couldn't be deleted: `<reason>`".

To rename, move or delete a folder: on **Mine**, select ⋯ on the folder — on its row in the table, or beside it in the list on the left (in the list, Shift+F10 opens the same menu) — then:

- **Rename** — the "Rename folder" dialog shows the folder's name under **Folder name**; type the new name and select **Rename** (it stays greyed out until the name changes). **What you'll see when it's done:** "Renamed "reports" to "reports-2026"."
- **Move to…** — in the "Move folder "reports"" dialog, choose where the folder should go and select **Move here**; everything inside it goes too. The folder itself and the folders inside it can't be chosen. **What you'll see when it's done:** "Moved "reports" into archive." (or "Moved "reports" into Library.").
- **Delete folder** — you're asked "Delete the folder "q1" and any empty folders inside it? No files are deleted." Select **Delete folder**. **What you'll see when it's done:** "Deleted folder "q1"." Only a folder with none of your files left in it can be deleted: move or delete them first.

If a folder also holds files someone else put there that you aren't allowed to change, renaming or moving it moves only yours, and the line says how many stayed — for example "Renamed "reports" to "reports-2026". 12 files moved; 2 you can't edit stayed in "reports"."

Folders in Shared with me and Organization. These tabs show the folders the shared files sit in — someone else's folders — so they have no ⋯ menu and no **New folder** button. A folder itself is never shared: people see a folder only when they can see a file in it, so share the files you mean to share, as before.

Folders when you pick a file from your library. The **From library** button in the tools and the editor opens "Open from your library", which shows the same folders: the list on the left (on a

wide screen), the path above the files, and the open folder's folders before its files — select one to open it, or a part of the path to go back up. It lists every file you can see, from all the tabs. Its **Search your library** box looks in the open folder and in every folder inside it. A folder with nothing in it says "This folder is empty.", and the next time you open the dialog it starts in the folder you used last.

> ⚠ **IF SOMETHING GOES WRONG**
>
> Every message says what to change:
>
> - "A folder name can't contain /. Open the folder first to make one inside it." — when renaming: "A folder name can't contain /. Use Move to… to put it inside another folder."
> - "A folder name can't contain a backslash (). Use / to put a folder inside another."
> - "A folder name can't contain hidden control characters."
> - "A folder name can't be blank."
> - "A folder can't be named "." or ".."."
> - "Each folder name can be at most 80 characters."
> - "Folders can go at most 10 levels deep."
> - "A folder path can be at most 500 characters."
> - "There's already a folder called "`<name>`" here." — a folder with that name, or the same name in different capital letters, is already there.
> - "That's already the folder's name."
> - "A folder can't be moved into itself."
> - "There's no folder called "`<folder>`" any more." — someone renamed or emptied it in the meantime; select Refresh (the circular arrow).
> - "This folder still has `<number>` of your files in it. Move or delete them first." (with one file: "This folder still has 1 of your files in it. Move or delete it first.")
> - "This folder holds more than 5,000 files, too many to move at once. Move some of them into another folder first."
> - "You are not allowed to create folders." or "You are not allowed to change folders." — your workspace is read-only, or your role doesn't allow it; ask your administrator.
> - "The folders couldn't be loaded.", "The folder couldn't be created.", "The folder couldn't be renamed.", "The folder couldn't be deleted." or "The files couldn't be moved." — the connection failed before the server could say why; check your connection and try again.

8.2. The Archive tab (administrators)

Documents are never deleted just because their owner's account is removed — they're kept here instead, grouped by the person who used to own them. Each group's header reads "`<name>` · account removed · `<date>`", with a line saying how many of that owner's documents

are showing (this counts only what's on the current page — it's not a total, since a search or filter can be narrowing the list).

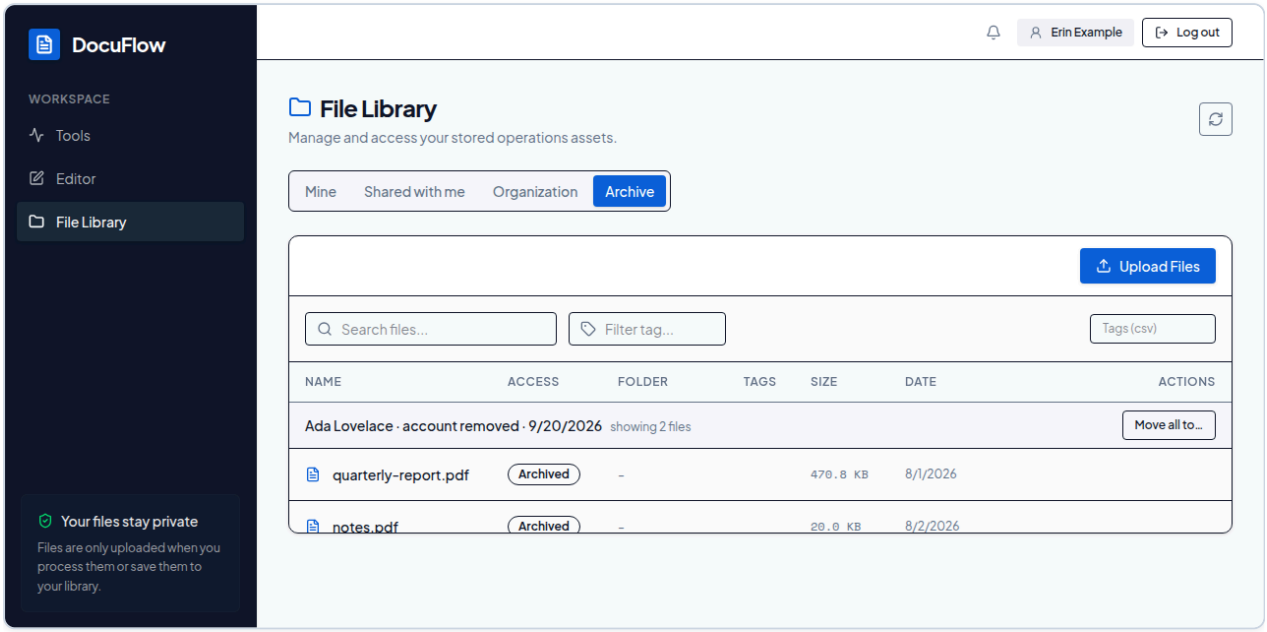

Figure: the Archive tab, administrators only — documents kept behind after an account was removed.

To give all of a former owner's documents to someone else at once: select **Move all to…** on their group header. A dialog opens; search for the new owner the same way as transferring a single file (see **Transfer ownership** in The file table). Once you pick someone, it reads "Move everything `<name>` left behind to `<new owner>`? This moves every file of theirs, including any not shown here." before you confirm with **Move all** — deliberately naming no count, since this moves every document that person ever owned, not just the ones currently on screen. **What you'll see when it's done:** "Moved `<number>` file(s) to `<new owner>`."

8.3. Uploading files

To upload:

1. Open the folder the files should go in (pointing at **Upload Files** shows "Upload to `<folder>`").
2. Optionally, type tags into **Tags (csv)** — they apply to the files you upload next.
3. Select **Upload Files** and choose your file or files.

What you'll see when it's done: the button shows "Uploading..." while it works, then the line above the table reads "Added 2 files to reports/2026." (or "Added 1 file to Library."). Files you upload are always yours: if you upload while **Shared with me** or **Organization** is open, the line adds " Find them under Mine." — they are in **Mine**, in a folder with the same name.

> **⚠ IF SOMETHING GOES WRONG**
>
> An upload failure shows in the error banner above the table (for example "Failed to upload files").

8.4. Search and filters

Above the table are two boxes: **Search files…** and **Filter tag…**. They look in the open folder and in every folder inside it; the table updates shortly after you stop typing.

While either has text, the Subfolders rows are hidden, a line reads "Results in `<folder>` and the folders inside it" ("Results in your whole library" at the top), and a **Folder** column shows where each file is — select it to open that folder (both boxes are cleared for you, so you see that folder's own files and folders). If nothing matches: "No files match your filters." Clear both boxes to see the open folder again.

8.5. The file table

Columns are a tick box (for selecting files), Name, Access, Tags, Size, Date and Actions. Size and Date need a wide window: in a narrower one they are left out, so every file's buttons stay in view beside the folders. The Folder column appears while you search or filter, and on the **Archive** tab.

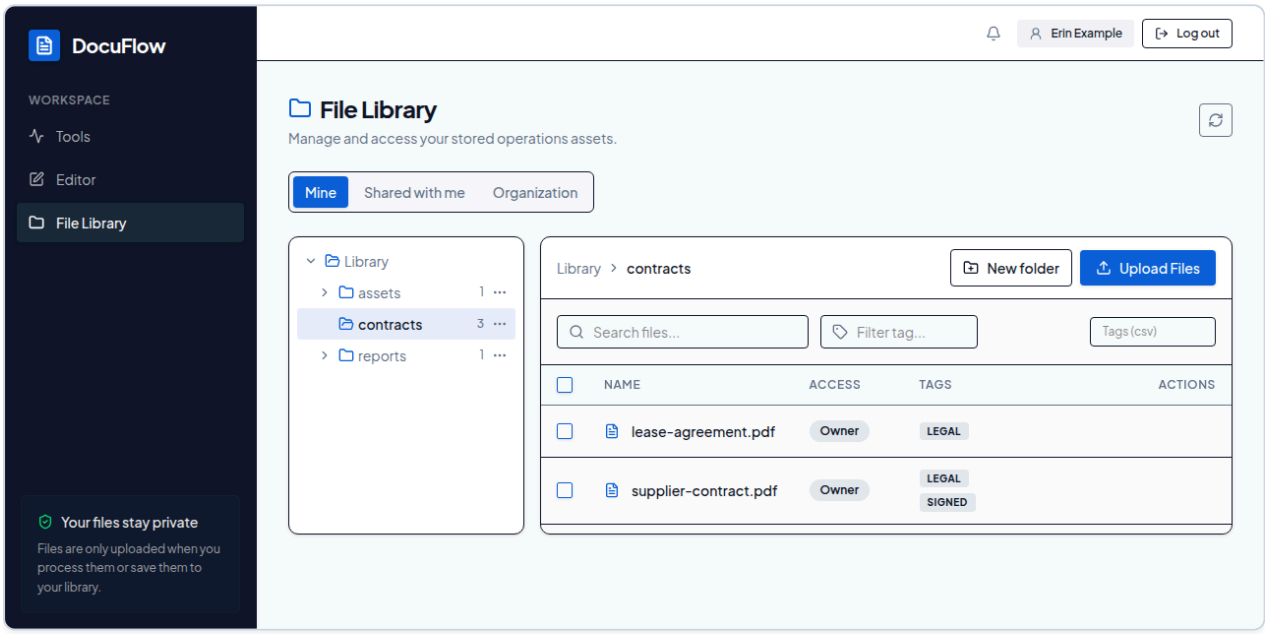

Figure: the file table on the Mine tab.

Access badges, shown under the file name area:

- **Owner** — you own this file.
- **Shared** — someone shared this file with you.
- **Public** — anyone with its link can download it.
- **Org** — shared with your whole organisation.
- **Service** — created by DocuFlow itself rather than a person.
- **Archived** — shown only inside the Archive tab, for a document whose owner's account was removed.

If a file is shared with named people, a small note "shared with `<number>`" appears under its badge.

A document whose owner's account was removed keeps its normal badge everywhere outside the Archive tab — a file shared with you still shows **Shared**, for example — but a small muted line appears under its name: "`<owner's name>`'s account was removed". Inside the Archive tab itself the badge switches to **Archived**, and the group header above the file already says who and when.

A link icon next to a file's name means it currently has an active public link — you'll only see this if you're allowed to manage that link.

Row actions appear only when you're allowed to use them, so if you don't see a button, you don't have that right on that particular file:

- **Preview** (the eye icon) — opens the file without downloading it: a PDF or image shows directly, an Office file (`.docx` `.xlsx` `.pptx` and friends) is rendered through the same converter Word/Excel/PowerPoint to PDF uses, and anything else shows "No preview for this kind of file." Only shown for a file you may download.
- **Download** — gets you the file.
- **Share** (the share icon) — opens the sharing dialog (see Sharing a file). Never shown for a file that only exists on this desktop device, since sharing needs the online engine.
- **Transfer ownership** (the two-arrow icon) — opens a small dialog to give the file to someone else. Search for them by name or email, and once you pick someone the dialog shows "Give `<file>` to `<name>`? You'll keep access only if it's shared with you." before you confirm with **Transfer**. Never shown for a file that only exists on this desktop device, since it has no remote owner yet to move.
- **Move to…** (the folder with an arrow) — moves the file to another folder (see Folders). Shown when you may edit the file.
- **Edit metadata** (the pencil icon) — opens **Edit File Details**, with Filename, Folder and Tags (comma separated), and **Cancel** / **Save Changes** buttons. Folder is a button showing where the file is, for example "Library › reports": select it to choose another folder in the same dialog as **Move to…** (titled "Choose a folder"), then **Choose this folder**. Only a folder you change is saved: renaming a file or changing its tags leaves it where it is.
- **Delete** (the trash icon) — asks "Are you sure you want to delete this file?" before removing it.

To edit a file's details:

1. Select the pencil icon on its row.
2. Change Filename and/or Tags; to change the folder, select the Folder button, choose a folder and select **Choose this folder**.
3. Select **Save Changes** (or **Cancel** to back out without saving).

What you'll see when it's done: the dialog closes and the row shows your changes.

> **⚠ IF SOMETHING GOES WRONG**
>
> If the file changed on the server since you opened the list — someone else edited or deleted it, or a share changed its ownership — the edit dialog closes and you'll see "The file was changed by someone else; reload and try again." The same sentence appears if this happens while deleting.

Paging

When there are more files than fit on one page, a footer reads "Showing `<first>` – `<last>` of `<total>` files" with **Previous** and **Next** buttons. It only appears once there's more than one page's worth of files to show.

8.6. Previewing a file

Select the eye icon on a row to see it without downloading it, in a panel beside the table (a full-screen view on a small screen).

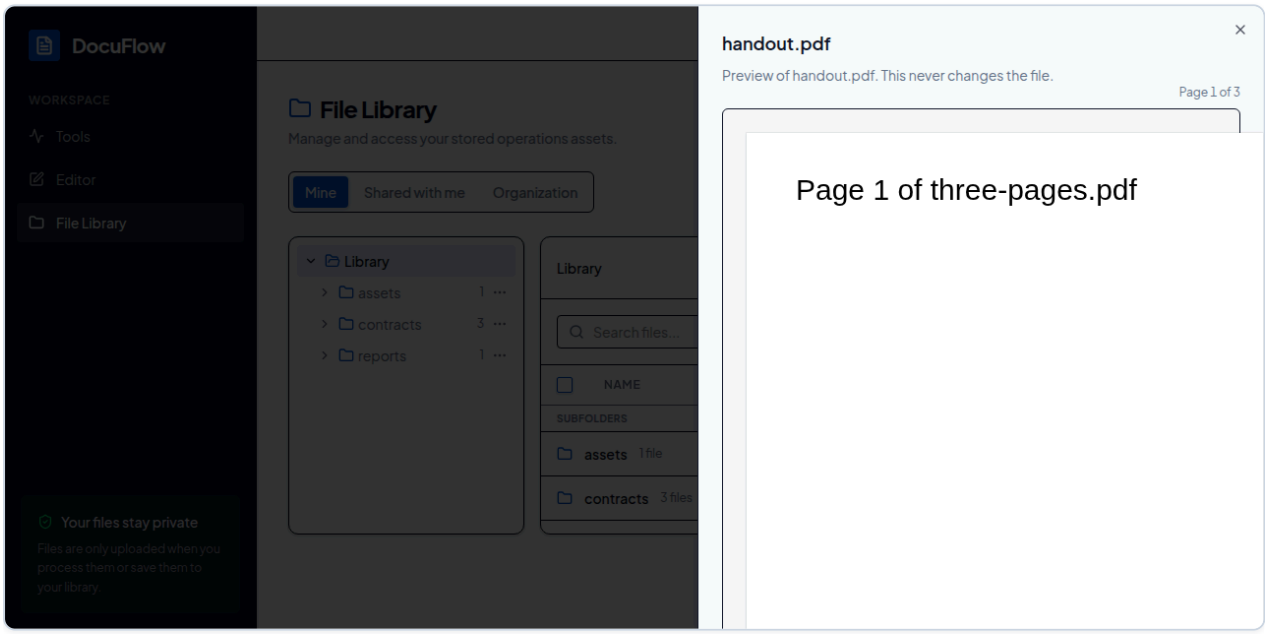

Figure: the preview panel, opened without downloading the file.

- A PDF or image appears right away.
- An Office file (Word, Excel, PowerPoint, OpenDocument, RTF) is converted to a PDF behind the scenes and shown the same way — this needs an internet connection, the same as the Word/Excel/PowerPoint to PDF tool. On the desktop app, whether the file only exists on this device or has already synced to your account, going offline shows "Needs an internet connection to preview this file." instead of trying and failing — a synced file's preview needs the connection too, exactly like a local-only one.
- Anything else shows "No preview for this kind of file."

- The panel has its own **Download** button, **Share** if you're allowed to, and **Transfer** if you're allowed to move the file to someone else.
- Previewing never changes the file.

8.7. Sharing a file

Select the share icon on a row to open **Share "** `<file name>` **"**.

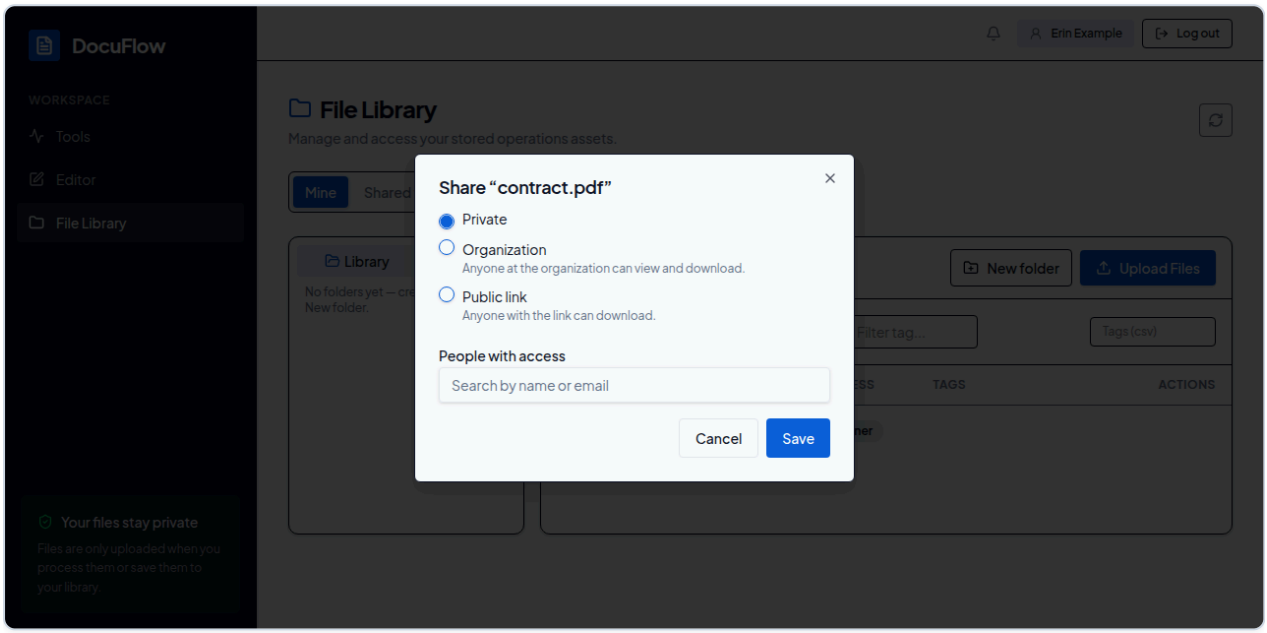

Figure: the Share dialog, open on a file.

Visibility (pick one):

- **Private** — no one else can see it.
- **Organization** — "Anyone at the organization can view and download."
- **Public link** — "Anyone with the link can download."

To share with specific people:

1. Type a name or email into the **People with access** search box (placeholder "Search by name or email").
2. Select the matching person from the results list — they're added as a chip below the box.
3. Repeat for anyone else, then select **Save**.

There is no way to add someone by typing an email that doesn't match a real account — only people the search finds can be added. Remove a person by selecting the × on their chip, then **Save**.

If the people search isn't available:

- Without access to the directory at all: "You do not have access to the people directory, so people cannot be added here. Use a link or organization visibility instead."

- If the directory is temporarily unreachable: an error line followed by "People can't be added here until then; anyone who already has access keeps it, and you can still share with a link."

Public links and their expiry. Once you choose **Public link** (and you're allowed to manage it):

- If no link exists yet: "A link is created when you save" — pick how long it should last from the **Expires** choices (**Never**, **24 hours**, **7 days**, **30 days**), then select **Save**. The new link is shown once, with the note "This link is shown only once — copy it now." — select **Copy** right away.
- If a link is already active: "Link is active — expires `<date>`" (or "Never").
- If a link has expired: "Link expired — a new link is created when you save."

To revoke or replace a link:

- Select **Revoke link** to remove it entirely.
- Select **Replace link…** to make a new one — you're warned "This replaces the current link. Anyone using the old link loses access." before confirming with **Replace link** (or backing out with **Cancel**).

Copying the link. Select **Copy** next to the link field. You'll see a small confirmation "Link copied". If your browser won't let DocuFlow use the clipboard, you'll instead see "Press Ctrl+C to copy" with the link already selected for you — copy it that way instead.

If you can't manage the link: "You are not allowed to create or remove this file's public link. Sharing with named people still works; ask the file's owner for a link."

What a person you shared with can and cannot do. Someone added by name can view and download the file as the visibility you chose allows; they cannot change who else it's shared with or manage its public link unless you've separately given them that. Someone who only has a public link can download the file — nothing more, and they don't need an account or to sign in at all.

> ⚠ **IF SOMETHING GOES WRONG WHILE SHARING**
>
> - If you're not the file's owner: "Only the owner can change this file."
> - If the file changed underneath you: "The file was changed by someone else; reload and try again." — the dialog closes and the list refreshes.
> - If an email address isn't valid: "Enter a valid email address."
> - For anything else: "Failed to update sharing."

8.8. Files in Google Drive or OneDrive

If your organisation has connected Google Drive or OneDrive, you can open files from there and save your results back, without leaving DocuFlow and without signing in to Google or Microsoft

yourself. If you don't see the buttons below, your organisation hasn't connected that service yet — ask your administrator.

To open a file from Google Drive or OneDrive:

1. In any tool, or in the editor, select **From Google Drive** or **From OneDrive** next to the place where you would normally add a file from your computer.
2. In the list on the left, choose where to look — for example **My Drive**, **Shared with me** or a shared drive.
3. Open folders to find your file, or type at least two letters into **Search this drive**. Select **Back** or a name in the path above the list to go up again.
4. Tick the file, or files, you want. Files the tool you are in can't use — for example a spreadsheet in Compress PDF — are greyed out and marked "Not supported here". A Google Doc, Sheet or Slides file says what it opens as (for example "Google Doc, opens as Word").
5. Select **Add files** (it counts them for you, for example **Add 2 files**).

What you'll see when it's done: the files appear in the tool as if you had added them from your computer, and a copy is kept in your File Library, tagged with where it came from. Your original in Google Drive or OneDrive is not changed.

To save a result to Google Drive or OneDrive:

1. When a tool, a converter, the editor or the image workspace has your result ready, select **Save to Google Drive** or **Save to OneDrive** next to its download button. In the image workspace it saves the image you have open, in the format and quality chosen under **Output**; like an editor export made only on your screen, a copy is also kept in your File Library.
2. Choose the drive and open the folder you want.
3. Check or change the file name. Under it, DocuFlow tells you exactly where it will go, for example "Will be saved as report.pdf in My Drive › Invoices". When you save several files at once, each keeps its own name.
4. Select **Save here**.

What you'll see when it's done: a line such as "Saved to Google Drive › Invoices › report.pdf" with an **Open in Google Drive** (or **Open in OneDrive**) link that takes you to the file.

Inside **Shared with me** on Google Drive you must open a shared folder before you can save: at the very top, **Save here** is greyed out and it says "Open a shared folder first."

⚠ IF SOMETHING GOES WRONG

- "… Ask your administrator." — your DocuFlow e-mail address isn't known to your organisation's Google or Microsoft account, so DocuFlow can't open your files. Show the message to your administrator; there is nothing you can fix yourself. This can also appear for a shared drive.
- "… isn't answering right now. Try again." — Google or Microsoft didn't respond. Select **Try again**, or wait a moment.
- Anything else is explained in one sentence from DocuFlow — for example "That folder isn't available." or, on OneDrive, that a file name can't contain certain characters. Do what it says; **Try again** only appears when trying again can help.
- A file that is too large is refused with a sentence naming it. If you picked several files, the ones that were already added are kept and unticked, so selecting **Add files** again only tries the rest.
- "There's nothing here you can open yet. Ask your administrator." — your organisation hasn't made any drive available to you.
- When your connection to DocuFlow is down, the buttons are hidden rather than left to fail.

Screenshots of these steps will be added once the connection has been set up with a real Google Workspace and Microsoft 365 organisation.

9. Activity

Your activity page is a private record of everything you've done in DocuFlow — useful for checking what happened to a file, or confirming an action actually went through. It is the same list DocuFlow uses to answer "did I actually do that?", read back to you in plain sentences instead of raw log entries.

Before you start

You need to be signed in. Open it from the account menu in the top right: select **Your activity**.

There's nothing to set up beforehand — the page fills itself in from what you've already done in DocuFlow, and shows "Nothing here yet" if you're new enough that there's nothing to show yet.

Who can see this

The subtitle says it plainly: "Only you and your administrators can see this." No one else in your organisation — a colleague you've shared a file with, for instance — can see your activity page, and you likewise cannot see anyone else's from here. If your organisation's administrators need to look at everyone's activity together, they do that from their own, separate admin area, not from this page. This page only ever shows what happened to your own account and files — never an administrator's own actions on the system as a whole.

How events are grouped and timed

Events are grouped by the calendar day they happened on, in your own local time zone — so an event just after midnight for you falls under a new day heading even if the server's clock reads differently. The heading says **Today** or **Yesterday** for the two most recent days, and the full date (for example "26 September 2026") for anything older.

Within a day, the relative time next to each row counts up the longer ago something happened: "Just now" for anything under a minute, then minutes, then hours, then days. Hover over it (or look at its tooltip) to see the precise date and time instead. Because the day headings use your own local time, "Today" always means today where you are, not where DocuFlow's servers happen to run.

Tips

- Filtering by Action is the fastest way to answer "did I actually share this file?" or "did that job finish?" without scrolling through everything.
- "Time reported by device" on a row is a hint that the time shown might be off, not that anything went wrong with the action itself.

- Device-side events (signing out, deleting or saving a file on this device) only show up once your device has had a chance to send them — if you've just gone offline, expect a short delay after you reconnect.
- A share-link download never names who downloaded it — that's deliberate, since a public link is meant to work without an account.
- Combine the Action filter with **From** and **To** dates to answer a precise question, like "did I share this file last Tuesday?", without scrolling past everything else.
- If a row's action looks unfamiliar, it's likely something recorded by a newer part of DocuFlow that doesn't have special phrasing yet — the plain fallback sentence still tells you what happened, just less conversationally.

9.1. Your activity

The page heading is "Your activity", with the subtitle "Everything you have done in DocuFlow, newest first. Only you and your administrators can see this."

Events are grouped under day headings — **Today**, **Yesterday**, or the full date for anything older — newest first within each group. Each row shows a plain sentence describing what happened, plus how long ago it happened (for example "Just now", "5 minutes ago", "2 days ago"); hovering the time shows the exact moment. If your device's clock looked wrong when the event happened, a row also shows "Time reported by device".

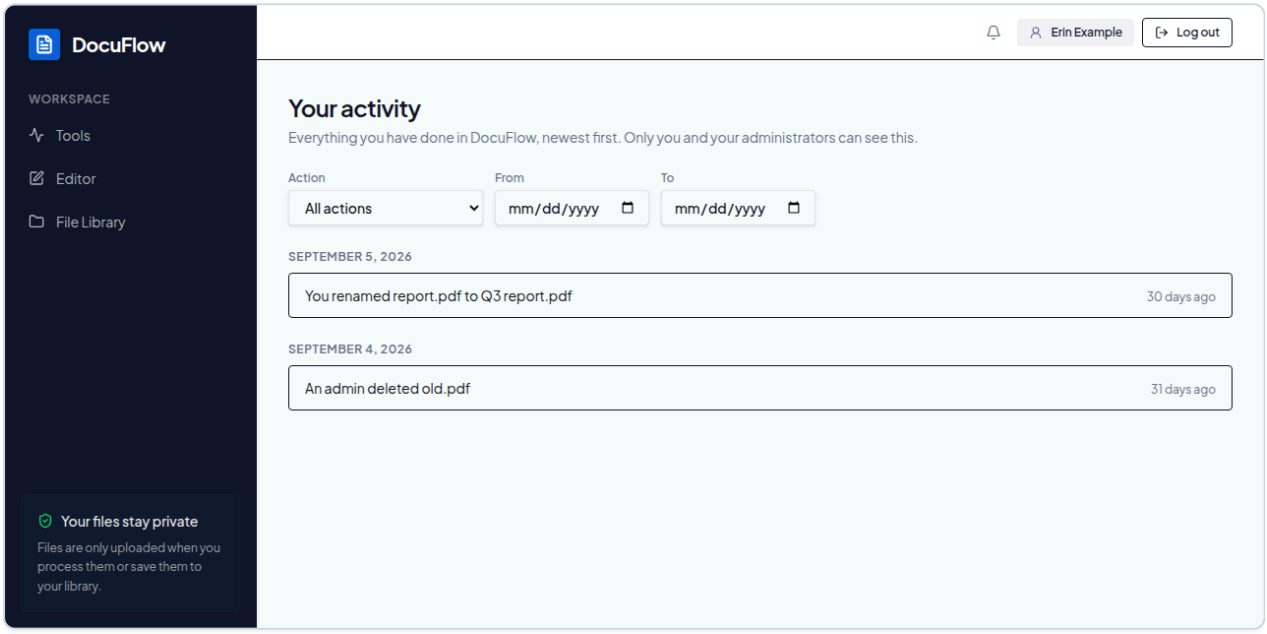

Figure: Your activity, reached from the account menu.

To narrow the list:

1. Choose an **Action** from the dropdown to see only one kind of event, and/or set **From** / **To** dates.
2. A **Clear filters** button appears once any filter is set — select it to see everything again.

What you'll see when it's done: matching events, grouped by day as above.

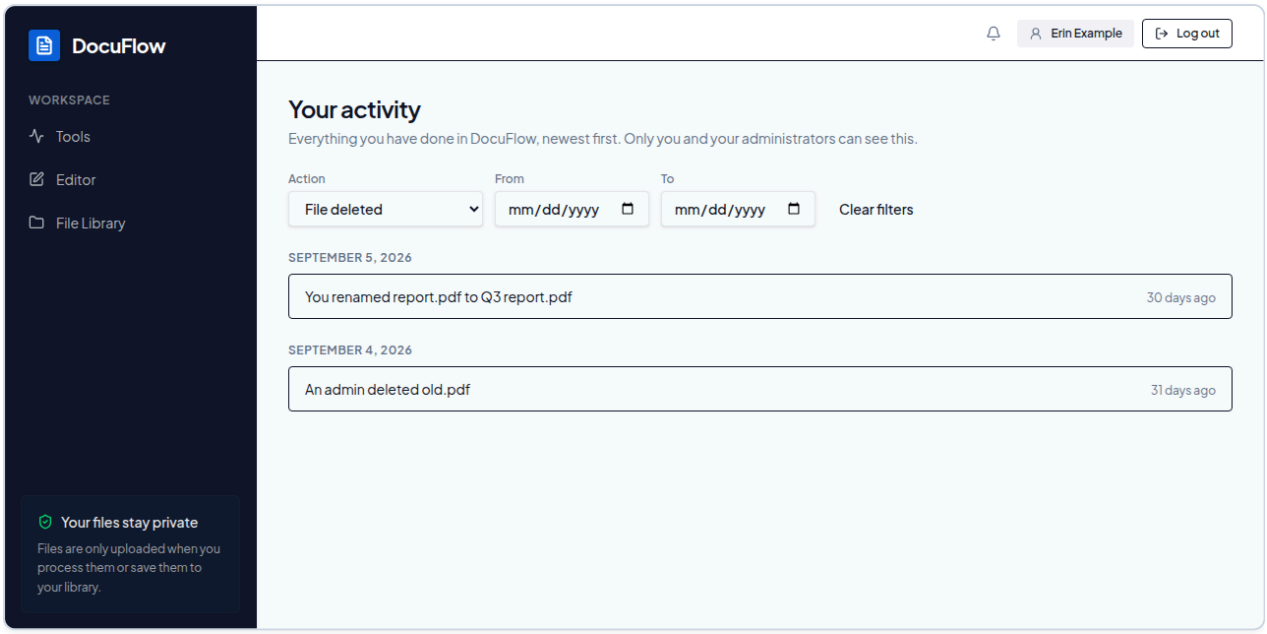

Figure: activity narrowed to one action, with the Clear filters button available.

The Action dropdown starts on "All actions"; the specific kinds you can filter to are:

Action
File uploaded
File renamed
Tags changed
File deleted
Deleted on device
Saved to device
Sharing changed
Link created
Link revoked
Link download
Files moved
Folder renamed or moved
Folder deleted
Job run
Settings updated
Signed in
First sign-in

Action
Signed out

Only these appear on your own activity page — kinds of events that only administrators can cause (managing other people's accounts, changing organisation-wide settings, and so on) are left off this list, since they could never be about something you did.

> ⚠ **IF SOMETHING GOES WRONG**
>
> - While loading: "Loading your activity…"
> - If it fails to load: "Your activity could not be loaded. Try again in a moment."
> - With no events at all: "Nothing here yet", with "Nothing here yet. Actions you take on your files will appear here."
> - With filters that match nothing: "No activity matches these filters", with "Clear the filters to see everything you have done."

Reaching the end of the loaded list shows a **Load more** button (it also loads automatically as you scroll). Select **Load more** if scrolling doesn't trigger it on its own — both do exactly the same thing, fetching the next page of your older history.

9.2. What each sentence says

The exact wording depends on what happened. On your own activity page, sentences about your own actions start with "You"; an action an administrator took on your behalf starts with "An admin". Examples you'll actually see:

- Uploading a file: "You uploaded `<file name>`"
- Deleting a file: "You deleted `<file name>`"
- Sharing a file: "You shared `<file name>` with `<people>`", or "You stopped sharing `<file name>` with `<people>`", or "You changed who can see `<file name>`"
- Creating a public link: "You created a share link for `<file name>`" (with "that expires on `<date>`" added if it does)
- Revoking a public link: "You revoked the share link for `<file name>`"
- Someone downloading through a public link: "`<file name>` was downloaded through its share link" — the person downloading is never named here
- Running a tool: a sentence naming what you did and to how many files, with " — the job failed" added if the job didn't succeed. The verb matches the tool:

Tool	Verb in the sentence
Merge	merged
Split	split

Tool	Verb in the sentence
Compress (PDF or image)	compressed
Convert	converted
OCR	ran OCR on
Rotate	rotated
Add watermark	watermarked
Protect with a password	encrypted
Remove a password	decrypted
Sign PDF	signed
Black out parts of a PDF	redacted

For example: "You compressed 3 files", "You merged 1 file", "You ran OCR on `<file name>`", "You signed `<file name>`", "You encrypted `<file name>` — the job failed" if that particular job didn't succeed.

- Signing in: "You signed in" (or "You signed in to DocuFlow for the first time" the very first time)
- Signing out: "You signed out"
- Renaming a file: "You renamed `<old name>` to `<new name>`"
- Changing a file's tags: "You tagged `<file name>` with `<tags>`", or "You removed the tag `<tag>` from `<file name>`" (or "tags" for more than one), or "You changed the tags on `<file name>`" when both happened together
- Moving several files at once: "You moved 3 files to reports/2026" ("Library" for the top of your folders). Moving a single file is not listed here — like renaming one, it's you filing your own document — and neither is making a folder, which changes nothing anyone else sees.
- Renaming or moving a folder: "You renamed folder reports to reports-2026 (12 files)" — the number is how many files went with it.
- Deleting a folder: "You deleted folder q1"
- Changing your own settings: "You updated your settings", with the specific settings named in parentheses when the server knows which ones changed

If an action doesn't match any of the sentences above — something new, or something the app doesn't have special wording for yet — the row falls back to naming the action plainly rather than showing nothing.

Device-side events

Three kinds of events are recorded straight from your own device rather than by the server, and you'll see them here the same way as anything else:

- **Signing out**: "You signed out" — recorded the moment you select **Log out**, on both web and desktop.

- **Deleting a file on this device** (desktop only): "You deleted `<file name>` from this device".
- **Saving a file on this device** (desktop only): "You saved `<file name>` to this device" — recorded whenever you save a file through the desktop save dialog.

If your device is offline when one of these happens, it's held and sent once you're back online — it still appears on this page once that catches up, with its original time. DocuFlow retries sending held events on its own, backing off a little longer between each attempt if the first ones don't get through, for up to five tries before it gives up on that particular event. If you were signed out as a guest when one of these happened (desktop only, with no account signed in), it's dropped rather than queued — there's no account to attribute it to, so nothing appears here for it.

Everything else you see on this page — uploads, deletes, shares, running a tool, and the rest — is recorded by DocuFlow's servers the moment it happens, not by your device, so it doesn't depend on your connection at all.

10. For administrators

The admin area is where an administrator sees what everyone has done in DocuFlow, decides how long that record is kept, and manages who can sign in and who else administers the system.

Before you start

You need to be an administrator — membership of the engine's admin group. If you are, an **Admin** link appears in your account menu; nobody else sees it.

Reaching the admin area

To open the admin area:

1. Select the account menu in the top right.
2. Select **Admin**.

There are three things you might see instead of the area itself, depending on whether your access could be checked:

- **Still checking:** "Checking your access…" — wait; this is not a denial.
- *You're not an administrator:* you're sent straight back to the workspace, without a message.
- *Your access couldn't be checked:* you stay on the page, with a banner: "Your permissions could not be checked." / "The authorization service is unavailable, so the admin area cannot be opened. Try again shortly." This is not the same as being denied — it means the check itself failed, so try again shortly rather than assuming you've lost access.

What you'll see when it's done: the "Admin" heading, with the subtitle "Everything people have done in DocuFlow, how long it is kept, and who may administer it," and up to five tabs: **Audit log**, **Settings**, **People**, **Integrations**, **Letters**. Which tabs you see depends on what you personally have rights to — if you can open the area but none of its sections are available to you, you'll see: "You can open the admin area, but none of its sections are available to you."

Tips

- The admin area's three states — checking, denied, and "couldn't be checked" — look different on purpose: a banner saying your permissions couldn't be checked means try again, not that you've lost access.
- You can't deactivate, delete, or change the administrator status of your own account from this screen — do that from another administrator's session.

- Set a password directly when a person can't receive email; copy the one-time link when they can get it another way (chat, in person) faster than email would arrive.
- A refused delete because someone "still has documents" is not a dead end you can push past from this screen — nothing here moves or removes those documents for you.
- Read the whole of **Everything this letter can say** before approving a proposal — a "Shown only if …" part never appears in the preview's sample letter.
- The audit log's Action filter includes administrative events (people and settings changes) that your own **Your activity** page never shows.

10.1. People

Manages who has an account and who else is an administrator. Accounts themselves live in your organisation's login system; "Administrator" here means membership of the engine's admin group.

If people management isn't connected on this server, the whole screen is read-only and shows: "People management isn't set up on this server yet. Ask whoever manages your DocuFlow server to connect it to your login system."

Find a person

To find someone:

1. Type into **Find a person** (placeholder "Name or email").
2. Type at least 2 characters — fewer shows "Type at least 2 characters."

What you'll see when it's done: a list of matching people.

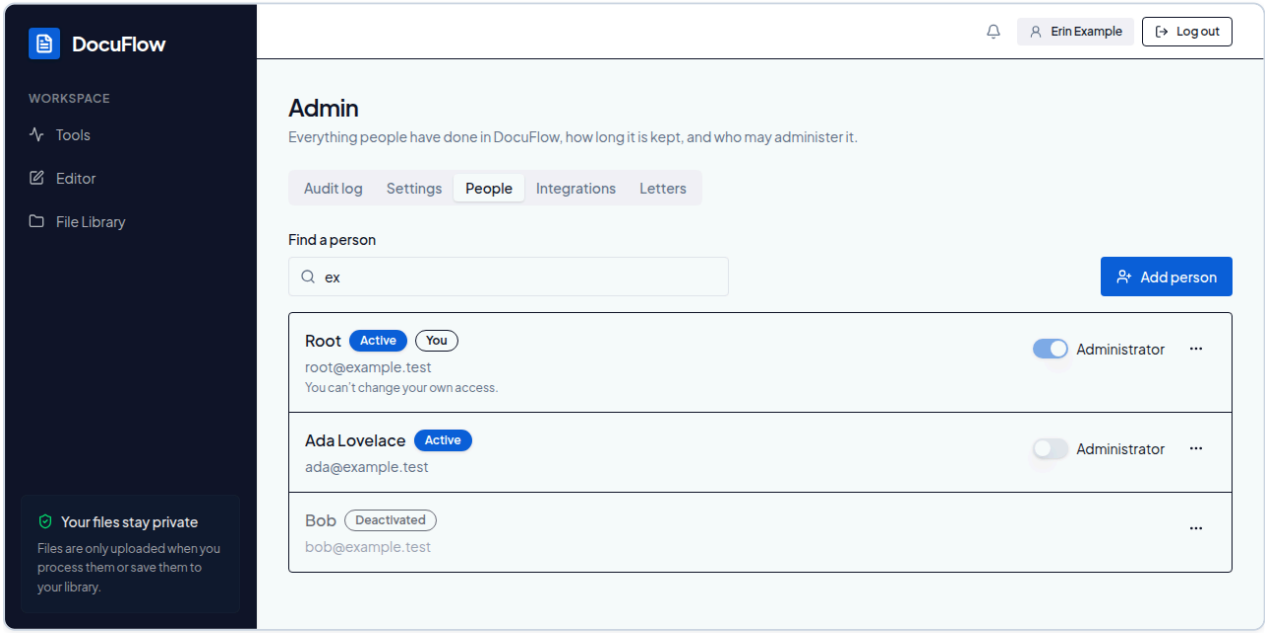

Figure: matching people, with their Active/Deactivated status and Administrator switch.

> ⚠ **IF SOMETHING GOES WRONG**
>
> No matches shows `Nobody matches "<query>". Check the spelling, or add them.`

Add a person

Creates an account and emails the person a link to set their own password.

To add a person:

1. Select **Add person**. The dialog explains: "They'll get an email with a link to set their password."
2. Fill in **Name** and **Email**.
3. Tick **Administrator** if they should be able to open Admin and manage people — the checkbox explains: "Can open Admin and manage people."
4. Select **Create account**.

What you'll see when it's done: `Account created. We emailed a set-password link to <email>.`

> ⚠ **IF SOMETHING GOES WRONG**
>
> - Name left blank: "Enter the person's name."
> - Not a valid email: "Enter a valid email address."
> - The invitation email couldn't be sent: "Account created, but the email couldn't be sent." — a **Copy set-password link** button appears so you can send it yourself.
> - Making them an administrator failed even though the account was created: `Account created, but making them an administrator failed: <reason> Use the switch to retry.`

Set a password, or send a reset link

Gives a person a new password directly, or sends them a link to set their own.

To send a password reset email:

1. Open a person's row menu (the "More actions" button at the end of their row).
2. Select **Send password reset email**.

What you'll see when it's done: `Reset email sent to <email>`

> ⚠ **IF SOMETHING GOES WRONG**
>
> "The email couldn't be sent." — a **Copy set-password link** button appears as a fallback.

To set a password yourself:

1. Open the row menu and select **Set a password**.
2. Type **New password** and **Confirm password** — at least 8 characters ("At least 8 characters. Your login system may ask for more.").
3. Select **Set password**.

What you'll see when it's done: `Password set. Tell <name> their new password and suggest they change it from their profile.`

> ⚠ **IF SOMETHING GOES WRONG**
>
> - Fewer than 8 characters: "Use at least 8 characters."
> - The two boxes don't match: "The two passwords don't match."

To copy a one-time set-password link:

1. Select **Copy set-password link** wherever it's offered.

What you'll see when it's done: "Link copied. Send it to the person." — the note under it reminds you: "This link works once and expires in 24 hours."

Deactivate or reactivate

Stops (or restores) a person's ability to sign in, without touching their files.

To deactivate someone:

1. Open their row menu and select **Deactivate**.
2. Confirm — the dialog reads `Deactivate <name>?` / "They can't sign in until reactivated. Their files and shares are kept."

What you'll see when it's done: the person's row shows "Deactivated".

To reactivate them: select **Reactivate** on their row — no confirmation is asked.

This option, like several others, is not available on your own row.

The Administrator switch

Grants or removes another person's access to the admin area.

To make someone an administrator: turn on the **Administrator** switch on their row — it takes effect immediately, no confirmation needed.

To remove someone's administrator access: turn the switch off. Confirm — the dialog reads `<name> will no longer be able to open Admin.` / "They keep their account and files." — then select **Remove administrator**.

You can't change your own access — your own row shows "You can't change your own access." instead of a switch you can use.

Delete a person

Permanently removes someone's account from the login system.

To delete someone:

1. Open their row menu and select **Delete**.
2. A confirmation dialog appears: `Delete <name>?` / "This removes their account from the login system for good. They will not be able to sign in, and this cannot be undone. Type their email address below to confirm."

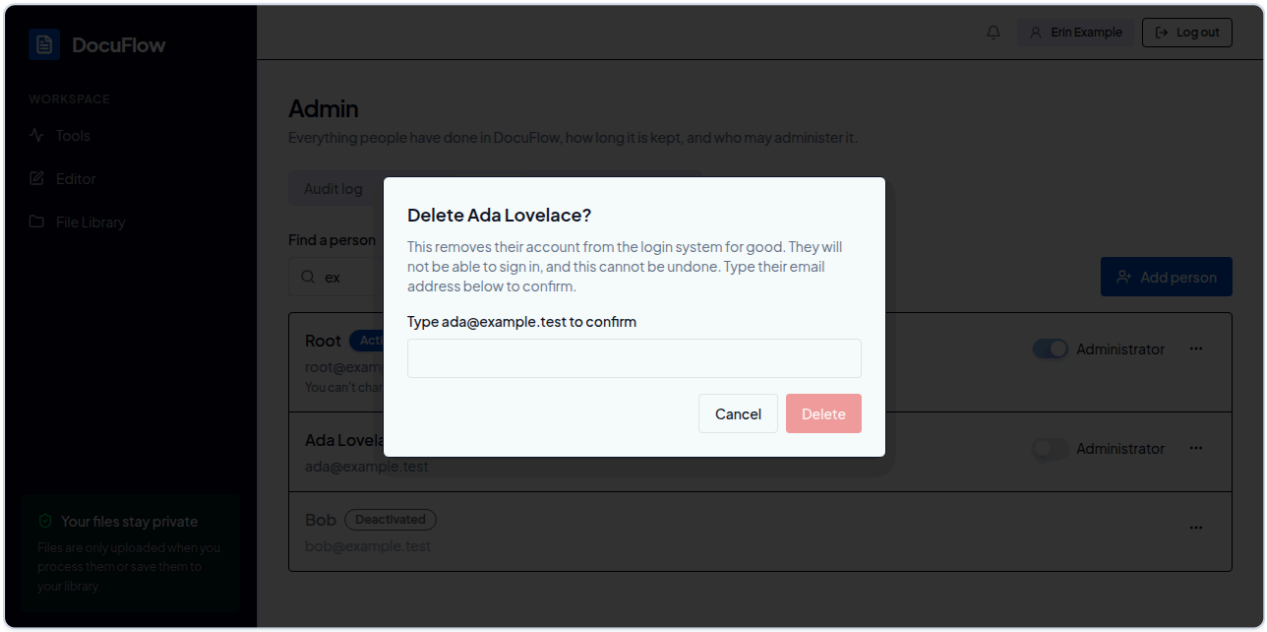

Figure: the delete confirmation — the Delete button stays disabled until the email matches.

3. Type their email exactly, under the prompt `Type <email> to confirm`. The **Delete** button only enables once it matches.
4. Select **Delete**.

If they still have documents, the dialog grows a second step instead of failing: "`<name>` still has `<number>` document(s)." Choose one:

- **Keep them in the Archive** (chosen by default) — "Anyone `<name>` shared them with keeps access. You'll find them under Archive in Files." The button becomes **Archive and delete**.
- **Move them to someone else first** — "Choose who they go to. Shares stay as they are." Search for the new owner under **Search for a person** (the person being deleted is never offered as their own target). The button becomes **Move and delete**, and stays disabled until you've picked someone.

Select the button again to confirm your choice. While the request is running the button is disabled and reads **Deleting…**, **Archiving…** or **Moving…**, so it can't be clicked twice.

What you'll see when it's done: the person disappears from the list.

⚠ IF SOMETHING GOES WRONG

- **The person still has documents and you haven't chosen yet:** the dialog grows the second step described above; nothing else changes.
- **Moving their documents couldn't be completed:** the reason appears on their row, prefixed "Couldn't move their files: " followed by the server's own explanation — for example, if the person you picked turns out not to be in DocuFlow any more by the time you confirm.
- Deleting accounts isn't available on this server at all: "Deleting accounts isn't available on this server yet."

This option, like Deactivate, is not available on your own row.

10.2. Settings

Controls how long audit events are kept before they're deleted.

To change how long audit events are kept:

1. Open the **Settings** tab.
2. Type a number of days into **Keep audit events for** — from 0 up to 3650. "0 keeps everything." The note under the box explains: "Events older than this are deleted every hour. 0 keeps everything."
3. Select **Save retention**.
4. If you're shortening the window (or setting it for the first time), a confirmation appears first, telling you roughly how many events that would remove right away — for example "More than 100 events are older than `<date>`" or an exact count. Confirm with **Save and delete**, or **Cancel**.

What you'll see when it's done: a "Retention saved" confirmation.

⚠ IF SOMETHING GOES WRONG

- An invalid number: "Enter a whole number of days between 0 and 3650."
- Settings couldn't be loaded: "The organization settings could not be loaded."
- The save itself failed: "The retention setting could not be saved. Try again in a moment."

The confirmation dialog is explicit that this cannot be undone: "Audit events cannot be restored."

10.3. Integrations

Connects DocuFlow to your organisation's Google Workspace and/or Microsoft 365, so that everyone can open files from, and save results to, Google Drive or OneDrive without linking a personal account. You set each one up once, for the whole organisation. Nothing is stored in Google or Microsoft by DocuFlow itself except the files people choose to save.

To open it: open the admin area and select the **Integrations** tab. There is one card for **Google Drive** and one for **OneDrive**, each with its logo, its **Enabled** switch and a status: **Not connected**, **Connected · not tested yet**, **Connected · tested** `<date>`, or **Needs attention**. A card that is switched off and not set up yet shows only "Switch on to set up Google Drive." (or OneDrive) — switch it on and the setup steps and the form appear. A service that is already set up keeps its form even when it is switched off, so you can still fix or remove it.

Connect Google Drive

You need to be a Google Workspace administrator, and the account you are signed in with to DocuFlow should be that administrator's.

1. On the **Google Drive** card, switch **Enabled** on. In Google Cloud, turn on the **Google Drive API** for your Cloud project. Then create a **service account** (it needs no roles) and download its key as a JSON file. The client ID you will need in step 3 is also inside that file.
2. In the **Google Drive** card, paste the whole file into **Service account key (JSON)**, type your Workspace domain (for example `org.com`) into **Workspace domain**, and select **Save**. The card then shows a **client ID**.
3. In the Google Admin console, go to **Security › Access and data control › API controls › Domain-wide delegation**. Add a new entry with that **client ID** and the scope `https://www.googleapis.com/auth/drive`, and authorise it.
4. Back in DocuFlow, select **Test connection**.

What you'll see when it's done: two lines under the card — one about the shared drives DocuFlow can see, one about acting as you. A green tick on both means it works.

Connect OneDrive

1. On the **OneDrive** card, switch **Enabled** on. In the Azure portal, register an application. Give it these **application permissions** (not delegated ones): `Files.ReadWrite.All` and `Sites.ReadWrite.All`. Create a **client secret**.
2. In the **OneDrive** card, paste the **Tenant ID**, the **Application (client) ID** and the **Client secret**. If you like, also fill in **Work e-mail domain** (see below). Select **Save**.
3. The card now shows a **consent link**. Open it and approve the permissions for your organisation. This needs a Microsoft 365 administrator.
4. Back in DocuFlow, select **Test connection**.

The switches and the lists

- **Enabled** — turns the service on or off for everyone without losing its settings. When it is off, nobody sees its buttons.
- **People can use their own drive** — lets each person open and save in their own My Drive or OneDrive. DocuFlow always acts as the signed-in person, using their work e-mail address. If that address isn't one of your organisation's Google or Microsoft accounts, the person is told to ask you — this is the message "Ask your administrator" in the manual's Files chapter.
- **Shared drives / document libraries people may use** — this list appears after a successful test. On a later visit, when the last test passed, select **Load shared drives** (Google) or **Load libraries** (OneDrive) to see it again; otherwise the card asks you to test the connection first. If the list can't be read, the card says why. Tick the ones people may use, then **Save**. It means different things for the two services:
  - *Google Drive:* if nothing is ticked, people see the shared drives they are already members of. Ticking drives only narrows that down — Google still checks each person's own membership, so ticking a drive never gives someone access they don't already have. The list you pick from is read as you, so you must be a Google Workspace administrator.
  - *OneDrive:* if nothing is ticked, **no** shared library is offered at all — people only get their own OneDrive. **Everyone in DocuFlow gets full access to a library you tick**, to read and to save, whatever its SharePoint permissions say. Tick only libraries that everybody may use.
- **Work e-mail domain** (OneDrive, optional) — when filled in, only people whose e-mail ends in this domain (for example `org.com`) can use OneDrive and the libraries. Leave it empty to allow any address DocuFlow signs in. Google is always limited to your Workspace domain. Keep in mind that this depends on people not being able to change their own e-mail address in your login system.

Credentials are never shown again after saving; each field says "Saved — paste to replace". If you change one, fill in all the credential fields again — leaving them all empty keeps what is saved. Until you select **Save**, the card says "Not saved yet". The status next to the name says whether the last test found a problem, or whether the connection is switched off.

To remove a connection: select **Remove** and confirm. People stop seeing the service; nothing already saved in Google Drive or OneDrive is deleted.

Needs attention

If the card says **Needs attention**, DocuFlow can no longer use the credentials it holds, and a warning under the status says what to do — usually to paste the credentials again and **Save**. The one exception is a server that is missing its safekeeping setting (see the message below): pasting again won't help there, it has to be fixed on the server by whoever runs DocuFlow. Until then, people asking for that service are shown a message to contact you.

⚠ IF SOMETHING GOES WRONG

- "INTEGRATIONS_ENC_KEY is not set on the engine. Set it and restart before configuring integrations." — the server itself is missing the setting it needs to keep these credentials safe. That is for whoever runs your DocuFlow server, not something to fix on this page.
- A test line in amber means DocuFlow reached the service but the check failed; read the sentence, it says what to change.

Screenshots of this tab will be added once a real Google Workspace and Microsoft 365 organisation has been connected.

10.4. Letters

The workspace letterhead every "workspace letterhead" template prints, and the letter templates people have proposed for everyone. You see the part you have the right to: the letterhead, the proposals, or both. A notification about a new proposal opens this tab directly, even when Admin is already open on another tab.

The workspace letterhead

To set up the letterhead:

1. Open the **Letters** tab.
2. Under **Workspace letterhead**, select **Upload logo** if you want one — a PNG or JPEG image, up to 1 MB and 4000 × 4000 pixels.
3. Type the **Lines** — the first is the **Office name**; **Add a line** adds up to four.
4. Fill in the **Address** and **Contact** (phone, e-mail, website) if you want them.
5. Choose the **Alignment**: **Centre** or **Left**.
6. Watch the preview — it shows the letterhead on a sample letter as you type.
7. Select **Save letterhead**.

What you'll see when it's done: "Saved. Letters that use the workspace letterhead now show it."

To remove it: select **Remove letterhead** and confirm — "Remove the workspace letterhead?" / "Letters that use it will print without a header until you save a new one." — "The workspace letterhead was removed. Letters that use it now print without a header."

⚠ IF SOMETHING GOES WRONG

- The logo isn't right: "Choose a PNG or JPEG image.", "Choose a PNG or JPEG image under 1 MB.", or "The image is too large. Use one up to 4000 × 4000 pixels."
- No line yet: "The letterhead needs between 1 and 4 lines."
- Too much text: "The workspace letterhead has too much text. Keep it under 2,000 characters."
- It couldn't be loaded: "The workspace letterhead couldn't be loaded." followed by the reason, or "Try again in a moment."

Template proposals

To answer a proposal:

1. Open the **Letters** tab. **Waiting** lists the proposals not yet answered — each with its title, who proposed it, when, their note, and "New workspace template" or "Updates `<template>`".
2. Select **Review**. A panel opens with the proposed letter in a preview and, under it, **Everything this letter can say**: the title (in both languages), the description, language and digits, the whole letterhead, the subject and every paragraph, the signature block, and every field of the form with its labels, type, whether it is required, its placeholder, its help and its choices. A part that only prints sometimes is labelled "Shown only if …" — read all of it: the preview only shows the parts that apply to its sample answers. It also says "This replaces the workspace template it was made from." or "This would be added as a new workspace template."
3. Select **Approve**, or write a **Reason, if you decline** (up to 500 characters) and select **Decline**.

What you'll see when it's done: "Approved — everyone in the workspace can use “`<title>`” now." or "Declined. The reason was sent to the person who proposed it." The proposal moves to **Answered**, with who answered it and when (and the reason, for a decline). The person who proposed it is notified.

⚠ IF SOMETHING GOES WRONG

- The person changed the proposal after you opened it: "This proposal was updated after you opened it. Look at it again." — the preview reloads with the new version; read it again before you approve.
- Someone else already answered it, or it was withdrawn: "This proposal has already been answered or withdrawn." — it leaves the list.
- The template was deleted meanwhile: "The proposed template was deleted."
- The list couldn't be loaded: "The proposals couldn't be loaded." followed by the reason, or "Try again in a moment."

10.5. Activity log

Shows everything everyone has done in DocuFlow, including administrative actions — the same idea as your own **Your activity** page (see Activity), but for everyone, and searchable.

To find events:

1. Open the **Audit log** tab.
2. Narrow the list with any combination of: **User** (a subject or email), **Action** (a dropdown of every kind of event, including administrative ones), **From / To** dates, and **Search** (a file name or email).

What you'll see when it's done: a table of matching events — **When**, **Who**, **Action**, **Target**, **Source** — newest first. Select a row's expand arrow to see the plain-language sentence, a list of details (or "This event carries no details."), the raw event data, and a **Copy as JSON** button. Reaching the end of the loaded rows shows a **Load more** button.

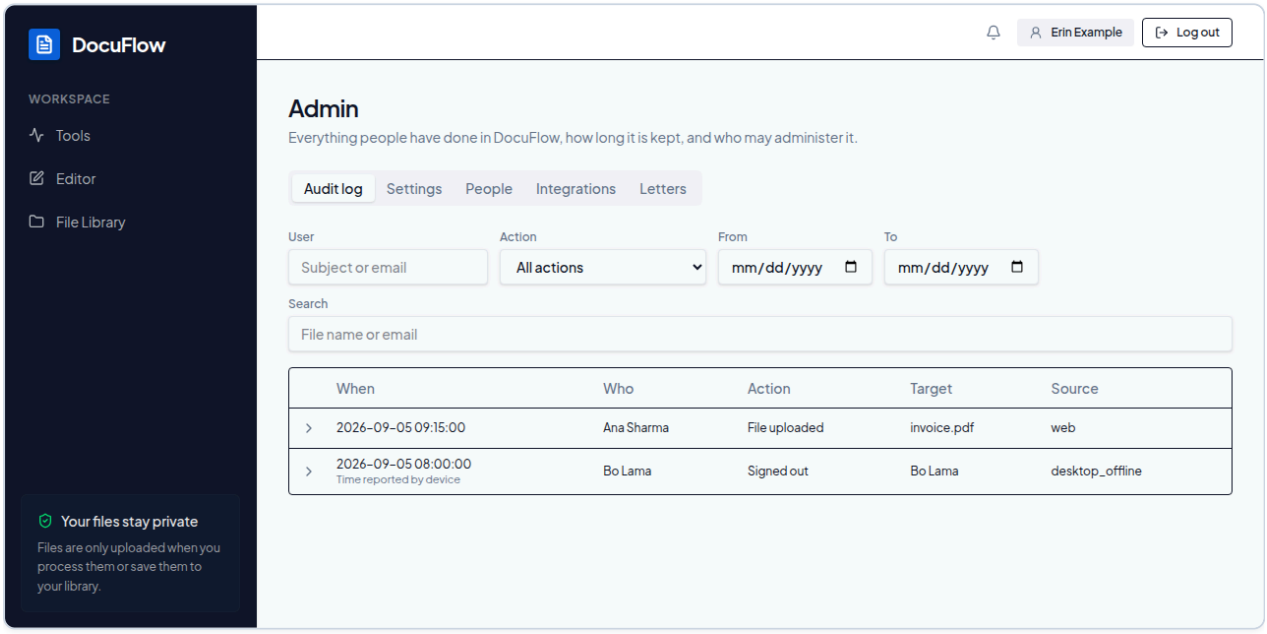

Figure: the Audit log tab, open on the admin area.

⚠ IF SOMETHING GOES WRONG

- You're not an administrator: "You are not a member of the admin group, so the audit log is not available."
- It fails to load for another reason: "The audit log could not be loaded. Try again in a moment."
- Nothing matches: "No audit events match these filters." / "Widen the date range or clear the search to see more."

11. Desktop app

DocuFlow's desktop app is the same tool catalogue as the browser, but built to keep working without an internet connection and to save files straight to your computer.

It exists for exactly the situations a browser tab can't cover well: working somewhere without reliable internet, wanting your files to save straight to a folder you chose rather than a browser's downloads folder, or simply preferring a dedicated application window over a browser tab.

This module has no screenshots of its own — the desktop app is a native window, not a browser page, so it can't be captured the same automated way as the rest of this manual. Every screen it shares with the browser (the Tools page, the editor, File Library) looks exactly like the screenshots in the earlier modules; where a screen looks or behaves differently on desktop, this module says so in words.

Before you start

Nothing — the desktop app opens straight to the **Tools** page whether or not you've signed in. Signing in is optional; it only adds syncing your work to your account.

What's different from the browser

- The app opens directly into the **Tools** page. On the web, the same page requires you to sign in first; on desktop it doesn't.
- Several tools can run entirely on your computer, without sending your file anywhere, whether or not you're online (see Working offline).
- Saving a finished file always goes through your computer's own save dialog, not a browser download.
- A **Desktop sync** control appears in the header so you can see and manage syncing your offline work to your account.
- Files that only exist on this device (saved locally before you ever signed in, or created while offline) can't be shared until they've synced to your account — the Share button doesn't appear for them in File Library, since sharing needs the online engine.
- Everything else — the editor, the Tools catalogue, the File Library layout — is the same app you'd see in a browser; nothing about how a tool works changes because you're on desktop.

Tips

- **Compress image** works offline for JPG, PNG, WebP, GIF and BMP pictures; HEIC and TIFF photos need a connection.

- **Remove background** with **Flat colour** works offline; **Photo (AI)** usually works offline once it has been used online one time; if it asks again, connect once more.
- Check the number next to **Desktop sync** before you sign out or close the app for a long stretch — it tells you if anything is still waiting to go up to your account.
- OCR is the one "local" tool that can still ask for a connection — that only happens if its language pack isn't installed on this device yet.
- A sync conflict means the same file changed in two places; picking **Use local** or **Keep cloud** decides which version wins, so check which one you actually want before confirming.
- If you don't sign in at all, the app still does everything except syncing and sharing — those specifically need your account and a connection.
- Your offline work belongs to whichever account was signed in when you made it — switching accounts on the same device doesn't merge the two people's offline work together.
- Signing out is the one action that erases the offline workspace, not simply closing the app — closing and reopening the app while still signed in keeps everything exactly as you left it.

11.1. Working offline

Some tools run entirely on your device and don't need a connection at all: **Compress PDF**, **Add watermark**, **PDF to images**, **PDF to text**, **OCR (make searchable)**, **Compress image** and **Remove background**.

Nepali typing, and the Nepali switch in text boxes, work on your computer with or without a connection.

OCR's caveat: OCR only runs on your device once its language pack is already installed locally. If it isn't, you'll see "This tool can't run on this device alone. Connect to the internet and try again." — connect to the internet and run it once online, or ask your administrator about installing the language pack.

Compress image's caveat: on your device it handles JPG, PNG, WebP, GIF and BMP pictures, and a PNG gets smaller only through **Keep under**, by being made smaller in size (the online engine can also reduce its colours). A HEIC or TIFF photo shows "This picture can’t be opened without an internet connection. Connect and try again, or choose a JPG, PNG or WebP.", and choosing WebP where this computer can't save it shows "Saving as WebP needs an internet connection on this computer. Choose JPG or PNG, or connect and try again."

Remove background's caveat: it always runs on your computer, online or not. **Flat colour** works offline every time. **Photo (AI)** needs one run while you're online to download its model; after that it usually works offline too; if it asks again, connect once more. Without that, it shows "Photo (AI) needs an internet connection the first time, to download its model. Connect and try again, or choose Flat colour."

Everything else — **Add page numbers**, **Sign PDF**, **Protect with a password**, **Remove a password**, **Flatten PDF** and **Sanitize PDF** — needs the online engine. When you're offline or

signed out, these tools show "Needs an internet connection to `<task>` PDFs." and their button is disabled, rather than letting you start the job and failing partway through.

The tools that work offline are exactly the ones DocuFlow can run with the PDF and picture engine built into the app itself; everything else genuinely needs your organisation's document-processing engine on the other end of a connection, so there's no way around waiting for one when you're offline.

This applies to every tool, not only the ones above: whenever a tool's job can't run on your device — converting an Office document to PDF, comparing two PDFs, filling a form, and the like — the app automatically sends it to the online engine as long as you're connected and signed in, with no extra step or switch to flip. You only see the connection message when you're offline or signed out, never as an extra click while you're online.

One more case worth knowing: if you're signed out, a tool that can run locally uses local processing even while you're online — the Utility Engine needs a signed-in session, so without one, local is the only option available to those tools.

Runs offline	Needs a connection
Compress PDF	Add page numbers
Add watermark	Sign PDF
PDF to images	Protect with a password
PDF to text	Remove a password
OCR (make searchable), once its language pack is installed	Flatten PDF
Compress image	Sanitize PDF

How offline work syncs to your account

Once you're signed in, a **Desktop sync** control sits in the header. It only shows on wider windows, so resize the app window if you don't see it and expect to. It reads:

- **Desktop sync** — online and idle, ready to sync.
- **Syncing** — a sync is running right now.
- **Offline** — no connection; nothing can sync until you reconnect.

A small number next to it counts changes still waiting to sync.

To sync manually: select the sync control. It's disabled while you're offline, signed out, or already syncing — otherwise it syncs on its own every 30 seconds while you're online and again automatically the moment you reconnect, so you rarely need to select it yourself; it's there mainly for "sync right now" and for resolving failures or conflicts.

If something failed to sync: a **Retry** `<number>` button appears — select it to try those changes again.

If sync itself can't run: a short error appears next to the sync control — for example "Sync could not start.", "Queued changes could not be retried.", "The local version could not be synchronized.", or "The local conflicting changes could not be cleared." These mean the attempt itself didn't go through (often because the connection dropped mid-sync); nothing on your device is lost, and selecting the sync control again once you're back online tries again.

If a change conflicts with what's already on your account (the same file was changed both on this device and elsewhere):

- **Use local** `<number>` retries with your device's version. You'll be asked to confirm: "Use the local version for these conflicts? This explicitly retries the local changes against the online workspace."
- **Keep cloud** discards your device's queued changes and keeps what's on your account. You'll be asked to confirm: "Keep the cloud version? This stops the conflicting desktop changes from being uploaded. Your local copies remain on this device."

Signing-out and file-saving events made on this device are always synced first, ahead of your files, so your activity record stays accurate even if a file sync is still catching up. If one of these events can't reach the server right away — you're offline, or the request fails — it's held and retried automatically, waiting a little longer between each attempt, for up to five tries before DocuFlow gives up on that one event. See Activity for what these device-side events look like once they arrive on your activity page.

Where your offline work is kept

Your offline work is kept per account, on this device. If more than one person signs in to the same installation of the desktop app at different times, each person's offline files and queued changes are kept separately — signing in as yourself doesn't show you anything queued by whoever used the app before you, and vice versa.

This is also why a fresh install of the app has nothing to sync the very first time you sign in: there's no offline workspace at all until you've actually signed in once on this device.

11.2. Saving, editing and files on desktop

Saving files on desktop

Wherever the browser would download a file, the desktop app instead opens your computer's own save dialog — you choose exactly where the file goes. The result screen tells you "`<file>` saved where you chose." once it's done, and the button that starts a save reads **Save** rather than **Download**.

> **⚠ IF SOMETHING GOES WRONG**
>
> "The save dialog could not be opened: `<reason>`", or "The file could not be written to `<path>`: `<reason>`" — try again, and check that the chosen location is still available (for example, a removable drive hasn't been disconnected).

With more than one file to save at once — several images, or several documents exported together — the button reads **Save all (`<number>`)** instead of one button per file, so you make one save choice instead of several. The editor's own export dialog uses the same idea: on desktop its finishing button reads "…& save" rather than "…& download", for the same reason the result screens do.

The editor on desktop

The editor behaves exactly the same on desktop as in a browser, including its live previews for things like a watermark or a signature placement. The one visible difference comes right at the end: the button that finishes an export reads "…& save" instead of "…& download" once you're on desktop, because it's handing you the native save dialog described below rather than starting a browser download.

Files on desktop

File Library works the same way it does in a browser (see Files): the same tabs — including Archive, for administrators — the same search and filters, the same row actions. The one difference is files that live only on this device and haven't synced yet — they can be downloaded, edited and deleted like any other file, but they can't be shared or transferred until a sync has carried them to your account, so their row has no Share or Transfer ownership button. A file that only exists on this device can also never be archived — the Archive tab only ever shows documents the online engine kept behind, the same as in a browser.

Folders work offline too. You can make, rename, move and delete folders, and move files between them, without a connection — the folders made on this computer are kept here, and the changes go to your account the next time you're online, in the order you made them. If the same folder was changed both here and somewhere else in the meantime, the online version wins: the folders stay as they are online, and the files on this computer are moved where you put them. A folder you deleted here that still holds files online comes back the next time the list is shown. Signed out, folders stay on this computer only, like everything else.

On Windows, dragging a file onto a folder may not work in the desktop app. Use **Move to…** on the file's row (or in the bar after ticking files) instead: it does the same, and it always works.

11.3. Drives and letter templates on desktop

Google Drive and OneDrive on desktop

Opening from and saving to Google Drive or OneDrive works as in the browser while you are connected. Two differences:

- A result made by the desktop app's own offline engine has no **Save to …** button; the result says "Files made on this device can't be saved to a cloud drive from here. Download them instead."
- An editor export made only on your device is first added to your File Library and synced, then saved to the drive. If the library can't sync right then, you'll see "Your library hasn't synced yet — cloud saving works once it has. Try again in a moment."

Letter templates on desktop

Letter templates work offline too (see Utilities & Nepal, "On the desktop app", for every message):

- Templates you have opened before, the workspace letterhead and its logo stay on this computer, so you can fill in letters and **Print** them offline. **Download PDF** and **Save to library** need the online engine.
- You can create and change your own templates offline; they are saved on this computer and go to your workspace the next time you are online.
- If a change you made offline can't go onto the template when you reconnect — someone else changed it, it was deleted, or you can no longer change it — it is kept as a new template of your own called "(my changes)". Nothing is lost.
- Workspace templates can't be changed offline, and a new template needs one check online that you may create templates.
- Your unsaved work in the template builder is kept on this computer as a draft while you are offline, and goes to your account when you reconnect — so another computer offers it too. A draft of a template that was deleted meanwhile goes with it; one of a template you may no longer change stays on this computer.

11.4. Signing in on desktop

Signing in is never required to use the app — every tool works without an account. Signing in only adds account sync for your offline work, and lets you reach your online file library.

To sign in: select **Sign in** and continue through your organisation's login page, exactly as on the web (see Getting started). The desktop app opens your organisation's login page and brings you straight back into the app once you've signed in there — you never have to copy anything between a browser and the app yourself.

Choosing to work without an account

You can use the desktop app entirely without ever signing in. Everything runs and is stored on this device; you simply won't have an online file library, sharing, or syncing to fall back on, and tools that need the online engine (see Working offline) stay unavailable until you do sign in and connect. If you later decide to sign in, whatever you've already done stays right where it is on this device, and starts syncing to your account from that point on — you don't lose anything by starting out signed out.

This is exactly the reverse of the web app, where signing in is required before you can do anything at all. On desktop, an account is something you add when you want it, not a condition for getting started.

What signing out forgets

Signing out on desktop does more than end your session: it also forgets the app's offline workspace for that account. Once you sign out, the app can no longer work offline under that account until you sign in again as the same person — so make sure any pending sync has finished (no number showing next to **Desktop sync**, and no failed or conflicted items) before you sign out.

Your files themselves are not deleted by signing out — they're still on your account once you're synced. What's forgotten is the app's local access to work you hadn't synced yet, so the safest order is always: sync, confirm nothing is pending, then sign out.

11.5. If the online engine is unavailable

Even when you're online and signed in, your organisation's processing engine can itself be temporarily unreachable. When that happens the header shows a short notice — "Processing isn't set up yet" if it's never been configured for your organisation, or "Processing is temporarily unavailable" if it's down right now. Hovering the notice explains further: if part of the service is having trouble, "Some tools may not work right now"; if it can't be reached at all, "The processing service isn't responding. Your open work is safe; try again in a moment." Online-only tools behave the same as if you were offline until it recovers: they tell you they need a connection rather than failing partway through a job.

This notice only appears when there's actually a problem — a healthy connection to a healthy engine shows nothing at all in the header, so its absence is itself a good sign.

12. Notifications

Notifications tell you what happened to your files while you were busy elsewhere: someone shared a file with you, someone asked for access to one of yours, or a long job finished. They appear under a bell at the top of every page, and DocuFlow can also e-mail you about them.

Before you start

You need to be signed in. The bell sits in the top bar, next to your name. If you don't see it, you aren't signed in to a workspace yet.

On the desktop app

When you're offline, the bell still opens and shows the last list it received, with "You're offline" at the top. You can read it, but you can't mark things as read, answer requests or load more until you're connected again. **Settings** says "You're offline. Connect to change what DocuFlow e-mails you." instead of showing the switches.

12.1. The bell

A small number on the bell is how many notifications you haven't read yet. It disappears when there are none, and shows "99+" if there are more than 99. The number refreshes by itself about once a minute while DocuFlow is open on your screen, and straight away when one of your jobs finishes.

To read your notifications:

1. Select the bell. A panel titled "Notifications" opens with your latest notifications, newest first. Each is a plain sentence, such as "Asha Shrestha shared Budget 2026.xlsx with you.", with how long ago it happened underneath ("5 minutes ago", "yesterday"). Unread ones have a dot.
2. Select a sentence to go to what it is about. It is marked as read and DocuFlow opens the file or the job's result. On a job's result, select **Download**; DocuFlow then says where the file went (your browser's downloads, or on the desktop app the place you chose).
3. To clear the dots without opening anything, select **Mark all as read**.
4. Only the latest 20 are shown at first. Select **Load more** to see older ones.
5. Press Esc, or select the bell again, to close the panel.

What you'll see when it's done: the number on the bell goes down as you read, and disappears once everything is read.

If you have no notifications yet, the panel says "Nothing to show yet." If they can't be loaded, it says "Notifications can't be loaded right now."

12.2. File requests

When someone asks for your file

When someone asks you for access to one of your files, the notification has two buttons right under the sentence.

To answer:

1. Open the bell and find the request, for example "Bob Thapa asked for access to Contract.pdf."
2. Select **Share** to give them access. A short message confirms it: "Shared with Bob Thapa".
3. Or select **Ignore** if you don't want to share. The buttons are replaced by "You didn't share this file." The person is told you didn't share it, nothing more.

There is no "are you sure?" step. If the request was already answered by you in another window, DocuFlow says "This request was already answered."; if the file was deleted, it says "This file is no longer available." Either way the buttons go away. If the file is already shared with as many people as it can be, DocuFlow tells you to remove someone from its sharing first, then try again.

Asking for a file you can't open

You can ask the owner for access in two situations.

From a link that no longer works:

1. Open the link. The page says "This link is invalid or has expired."
2. Select **Ask for access**. If you aren't signed in, the button reads **Sign in to ask for access**; sign in and you come back to the same page.
3. A box titled "Ask for access" opens: "The owner gets your request and can share the file with you." Add a short note if you like in **Message (optional)**, up to 500 characters.
4. Select **Ask**.

What you'll see when it's done: "Asked. The owner will be notified."

From a library link you can't open: when a link to a file in the library (from a notification or a colleague) points at something you aren't allowed to see, the page says "You can't open this file" and "It hasn't been shared with you. You can ask its owner." Select **Ask for access** and continue as above. If you asked before, the page says "You asked on" followed by the date, with an **Ask again** button. Selecting it reminds the owner: "Asked again. The owner will be reminded." The owner is reminded at most once a day; if you ask too soon, DocuFlow says "You asked recently. The owner is reminded at most once a day."

If the file is already yours to open: the answer is "You already have access to this file." with an **Open it** button that takes you to it. If the file can't be found at all, DocuFlow says so: "We couldn't find this file. It may have been deleted, or the link no longer works."

12.3. E-mails

DocuFlow can e-mail you about three kinds of event:

- A file or a letter template was shared with you.
- Someone asked for access to your file, or answered your request; or a letter template was proposed for your workspace (administrators), approved or declined (the person who proposed it).
- A long job finished or didn't finish. Only long jobs count, and only if you haven't already seen the notification two minutes after it ended. If you were watching, you get no e-mail.

You never get more than 20 e-mails an hour. An e-mail names what happened and gives one thing to do next. For an access request it has a **Share** link and an **Ignore** link; these only open DocuFlow with the request highlighted (if you aren't signed in, sign in and you come straight back to it). Nothing is shared until you select the button yourself, so a forwarded e-mail can't hand out your files. Every e-mail ends with a link to change what you get.

Choosing what DocuFlow e-mails you

To change it:

1. Select your name in the top right and choose **Settings**.
2. Under "Notifications", switch on or off:
   - E-mail me when a file or letter template is shared with me
   - E-mail me about access requests and template proposals
   - E-mail me when a long job finishes
3. Each switch saves the moment you flip it.

What you'll see when it's done: "Saved." Below the switches, "You always see these under the bell." Turning a switch off only stops the e-mail; the notification still appears in the bell. Letter-template notifications work the same way: selecting one opens the template, or, for a proposal, **Admin** → **Letters**; a declined template opens in the builder.

If your organisation hasn't set up e-mail, the switches aren't shown and the page says "E-mail is not set up on this server." The bell works either way.