

# Documenso Upload Guide

## Documenso Template Upload Guide

**Purpose:** Manual upload instructions for ALAI AI Services legal templates to Documenso (sign.basicconsulting.no).

**Date:** 2026-05-01 | **Prepared by:** Lexicon

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### Templates to Upload

The following three templates must be uploaded as **DRAFT templates** ready for client signing:

1. **Mutual NDA** (Gjensidig Taushetserklæring)
  2. **Retainer Contract** (Ramme-avtale)
  3. **Data Processing Agreement (DPA)**
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### Pre-Upload Preparation

#### Step 1: Convert Markdown to PDF

Use Pandoc or LibreOffice to convert `.md` files to `.pdf`:

```
# Using Pandoc (if installed)
pandoc ~/Public/legal/ai-services/MUTUAL-NDA-template-v1.md \
  -o ~/Public/legal/ai-services/MUTUAL-NDA-template-v1.pdf \
  --pdf-engine=xelatex \
  -V geometry:margin=2.5cm \
  -V fontsize=11pt
```

```
pandoc ~/Public/legal/ai-services/RETAINER-CONTRACT-template-v1.md \  
-o ~/Public/legal/ai-services/RETAINER-CONTRACT-template-v1.pdf \  
--pdf-engine=xelatex \  
-V geometry:margin=2.5cm \  
-V fontsize=11pt
```

```
pandoc ~/Public/legal/ai-services/DPA-template-v1.md \  
-o ~/Public/legal/ai-services/DPA-template-v1.pdf \  
--pdf-engine=xelatex \  
-V geometry:margin=2.5cm \  
-V fontsize=11pt
```

**Alternative:** Open `.md` files in text editor, copy content to Google Docs or LibreOffice, export as PDF.

# Documenso Upload Workflow

## Step 2: Log in to Documenso

1. Navigate to: <https://sign.basicconsulting.no>
2. Log in with ALAI admin credentials (use Bitwarden: `bw get item "Documenso - sign.basicconsulting.no"`)

## Step 3: Create Template (for each document)

**For MUTUAL-NDA-template-v1.pdf:**

1. Click "**Templates**" in left sidebar
2. Click "**Create Template**"
3. **Upload PDF:** Select `MUTUAL-NDA-template-v1.pdf`
4. **Template Name:** `AI Services - Mutual NDA (NO/EN)`
5. **Add Signature Fields:**
  - **Signer 1 (ALAI Holding AS):**
    - Signature field at "For ALAI Holding AS" signature line
    - Name field at "Navn / Name" line
    - Date field at "Dato / Date" line
  - **Signer 2 (Client):**
    - Signature field at "For [PART\_2\_NAME]" signature line
    - Name field at "Navn / Name" line
    - Date field at "Dato / Date" line

## 6. Add Text Fields for Variables:

- [PART\_2\_NAME] — Text field at top (Part 2 section)
- [PART\_2\_ORG\_NUMBER] — Text field
- [PART\_2\_ADDRESS] — Text field
- [PART\_2\_CONTACT\_PERSON] — Text field
- [PART\_2\_EMAIL] — Email field
- [BESKRIVELSE AV FORMÅL] — Large text area (NO version, section 2)
- [DESCRIPTION OF PURPOSE] — Large text area (EN version, section 2)

## 7. Save as Draft Template

8. **Test:** Create a test submission to verify all fields populate correctly

### Repeat for RETAINER-CONTRACT-template-v1.pdf:

- Template Name: AI Services - Retainer Contract (NO/EN)
- Variables: [KUNDE\_NAVN], [KUNDE\_ORG\_NUMMER], [KUNDE\_ADRESSE], [KUNDE\_KONTAKTPERSON], [KUNDE\_EPOST], [BELØP], [ANTALL], [TIMEPRIS]
- Signature fields: ALAI + Client

### Repeat for DPA-template-v1.pdf:

- Template Name: AI Services - Data Processing Agreement (DPA)
- Variables: [KUNDE\_NAVN], [KUNDE\_ORG\_NUMMER], etc., [DATO]
- Signature fields: Data Controller (Client) + Data Processor (ALAI)

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# Step 4: Archive Templates

After templates are created in Documenso:

1. **Export templates as PDFs** from Documenso (if possible)
2. **Upload to archive.alai.no** (Paperless-ngx):
  - Tag: legal-template, ai-services, documenso
  - Correspondent: ALAI Holding AS
  - Document type: Contract Template
3. **Update ledger:** Append to ~/system/state/archive-first-ledger.jsonl

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# Step 5: Test Workflow

1. Create a **test submission** with dummy client data:
  - Test Client Name: "Test AS"
  - Test Email: post@alai.no (CEO mailbox)
2. Send signature request

### 3. Verify:

- Email branding is correct
- All fields populate
- Signature flow works
- Signed PDF is retrievable

### 4. **Delete test submission** after verification

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# Alternative: API Upload (Future Enhancement)

**Current blocker:** Documenso API authentication not yet tested in CLI context.

### **Future workflow (when API ready):**

```
# Get Documenso API key from Bitwarden
DOCUMENTENSO_API_KEY=$(bw get password "Documenso API Key")

# Upload template via API (endpoint TBD – check Documenso docs)
curl -X POST https://sign.basicconsulting.no/api/v1/templates \
  -H "Authorization: Bearer $DOCUMENTENSO_API_KEY" \
  -F "file=@~/Public/legal/ai-services/MUTUAL-NDA-template-v1.pdf" \
  -F "name=AI Services - Mutual NDA"
```

**Task for future:** Create `~/system/tools/documenso-template-upload.js` to automate this.

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## Notes

### **Bismillah and ALAI branding:**

Ensure PDF templates include:

- ALAI logo in header (if Documenso supports custom branding)
- Bismillah invocation at top of first page (already in Markdown source)

### **Signature notification:**

Documenso webhook at `https://api.basicconsulting.no/webhooks/documenso` will trigger on `DOCUMENT_COMPLETED` event. Webhook will:

- Post to Slack #exec

- Comment on MC task (if #XXXX in document title)
- Emit event to event-bus

**Future automation:**

Once signed, document should be auto-uploaded to archive.alai.no (see SENTINEL v3 audit Wire 2+3). Current state: manual upload required.

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**Full Source File:** `~/Public/legal/ai-services/documenso-upload-guide.md`

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