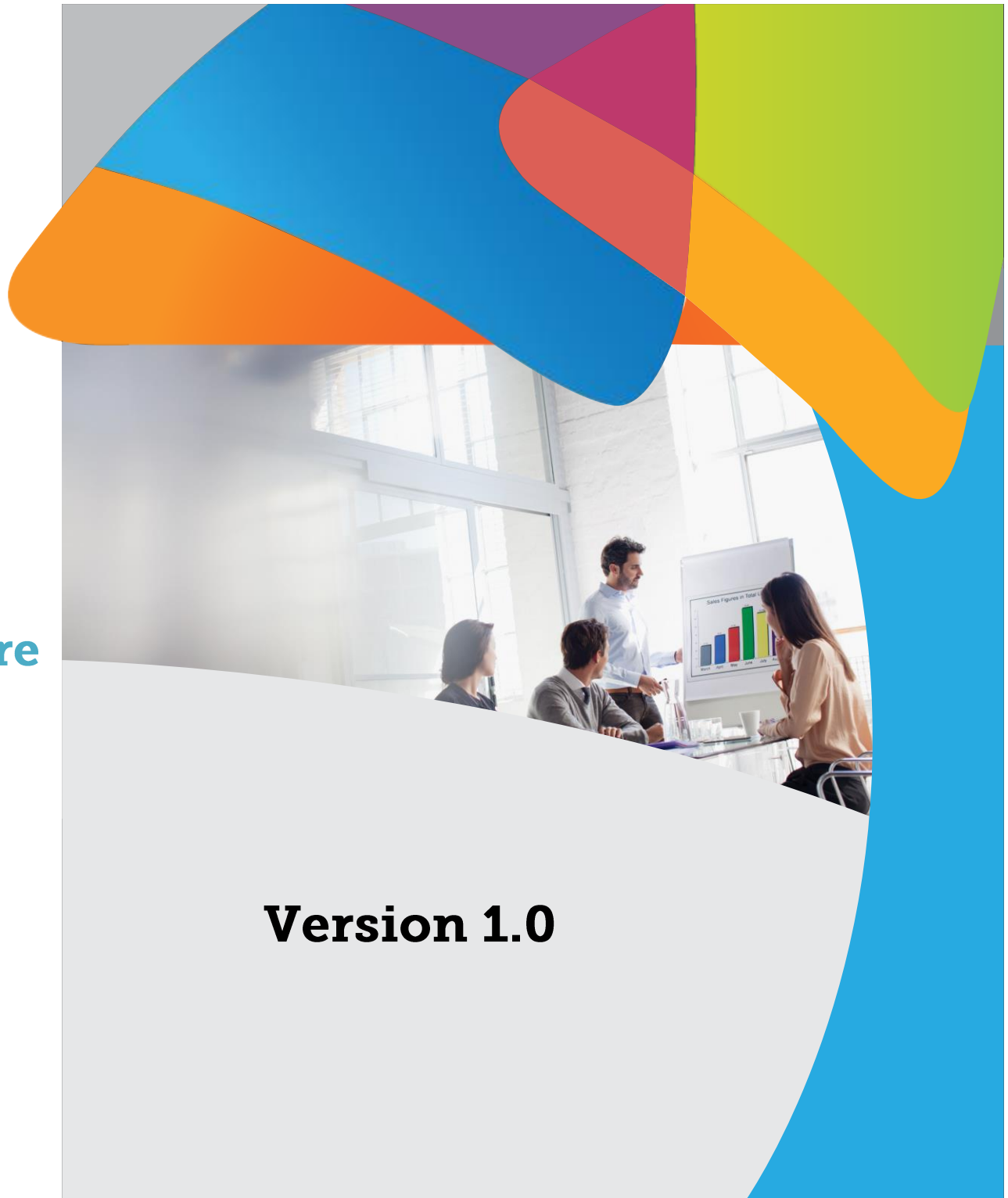




eSign – RightSignature



Version 1.0



How to get the plugin?

- For SuiteCRM, Buy it from the link below.

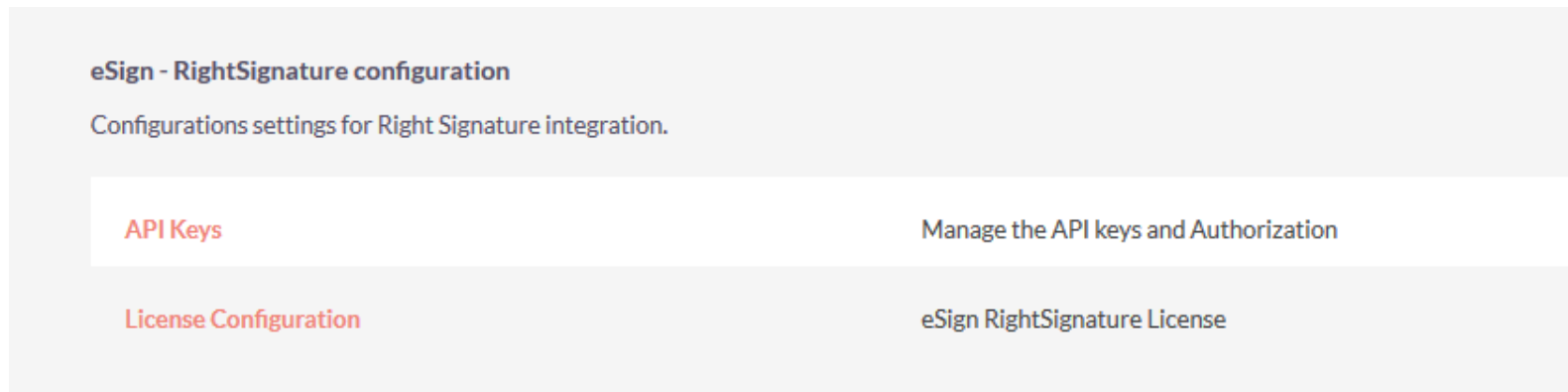
[eSign-RightSignature - SuiteCRM Store](#)

How to install?

- Navigate to **Admin > Module Loader** and select the zip file, that you would have received upon the purchase. Follow the installation process.

Validate the license

- Once add-on is installed successfully, you have to provide valid license. Go to **Admin** and access “**eSign – RightSignature Configuration**” link shown as below.



- Provide the license key that you have received upon purchase and validate it.

TS

LEADS

TARGETS

QUOTES

MORE

CREAT

ESIGN RIGHTSIGNATURE LICENSE: LICENSE CONFIGURATION

To Locate Your Key

1. Login to SuiteCRM Store

2. Go to Account->Purchases

3. Locate the key for the purchase of this add-on

4. Paste into the License Key box below

5. Hit "Validate"

License Key

VALIDATE

✔ Success!

CONTINUE

RightSignature App and API Key

- Get your RightSignature account from <https://rightsignature.com> and contact them to get yourself a API access.
- Once you get the API access create an application providing the necessary details

https://rightsignature.com/oauth_clients/new

The screenshot shows the 'API' tab in the RightSignature dashboard. The main heading is 'Register New API Key'. Below this, there is explanatory text about API consumers and a note that access is logged and revokable. A form for registration is present with two required fields: 'Application Name' and 'Description'. To the left of the form is a sidebar with 'Manage API Access' buttons and a 'Featured Integrations' section listing various partners. To the right is a sidebar with 'API Documentation' links.

Manage API Access

- Manage 3rd Parties
- Your API Keys
- Register New API Key
- Contact an API Specialist

Featured Integrations

- my gengo
- NurseTesting™
- bamboohr
- tunecore
- Bidsketch

DEVELOPER API Register New API Key

Our API can be used for commercial or enterprise applications. An application that uses RightSignature's API is referred to as an **API Consumer**. All API Consumers must be approved by RightSignature.

Once approved, an API Consumer requests access to act on behalf of one or more RightSignature users. Each user must give specific permission before an API Consumer can take actions for that user. API access is logged for auditing and revokable at any time.

Please fill out as much information as you have available. If you need another API key in the future or have made a grievous mistake—just let us know. We're happy to have integration partners and are here to help.

Application Name *

This is displayed to users if you use OAuth to request access to their account.

E.g. Industry Automotive Estimates Generator or WordStar Plugin

Description *

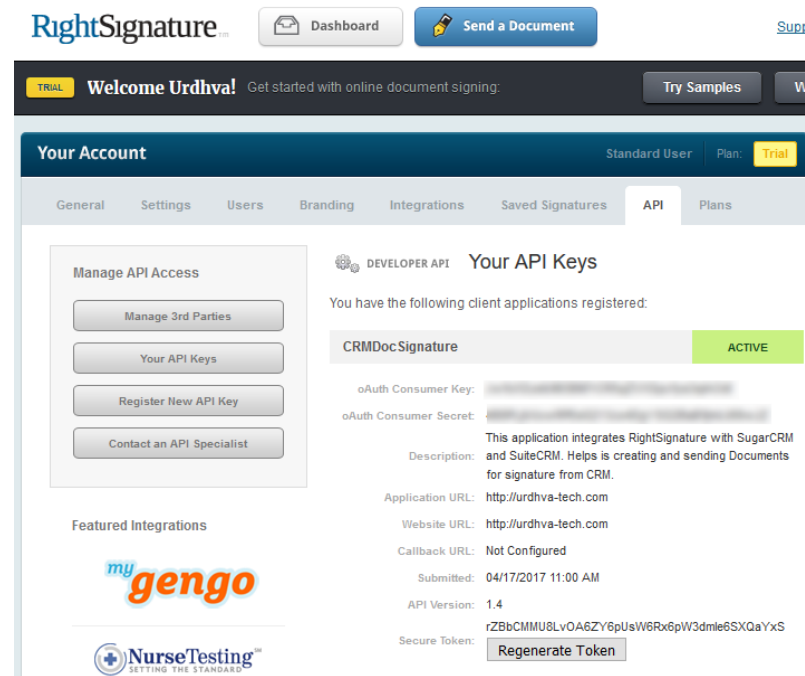
This is displayed to users if you use OAuth to request access to their account.

E.g. 'This application is solely used by Industry Automotive to send estimates within our Enterprise workflow' or 'WordStar Plugin allows WordStar users to send documents for signature through their RightSignature account.'

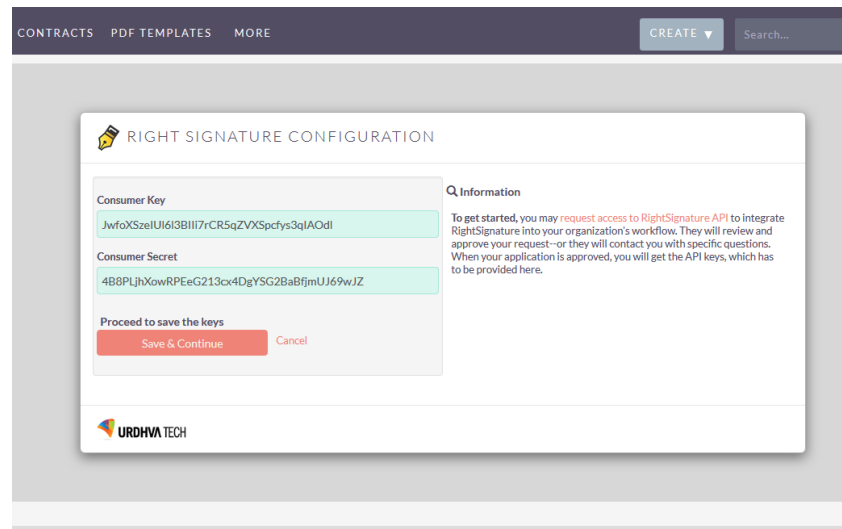
API Documentation

- Overview
- API Introduction
- API Documentation
- Common API Workflows
- Common API Diagrams
- Changelog

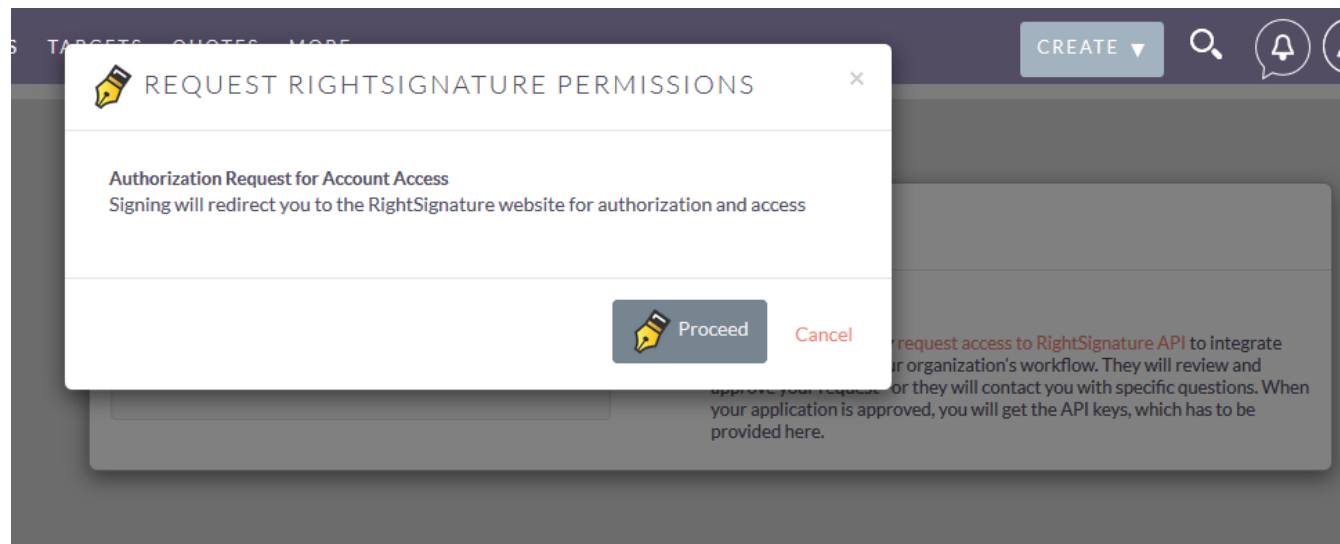
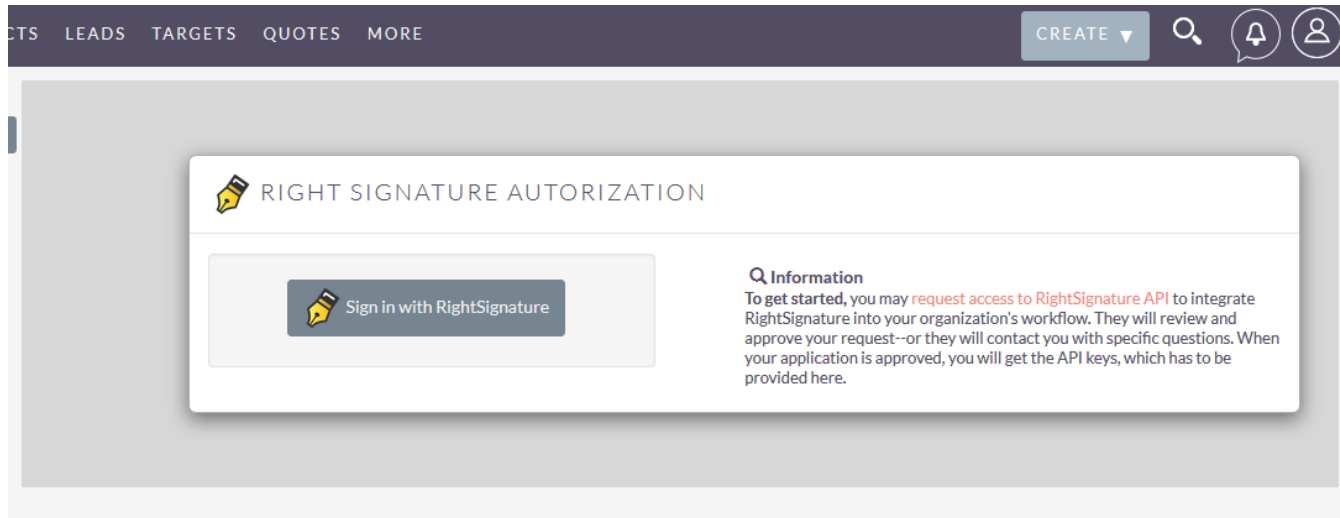
- You will receive the “Consumer Key” and “Consumer Secret key” as the application gets approved by RightSignature.



- Navigate to Admin -> “eSign-RightSignature Configuration” and Provide the “API Keys”



- Proceed to Sign in with RightSignature and authorize the Application.



- This will redirect you to the RightSignature and would ask to grant the access.

The screenshot shows the RightSignature web interface. At the top, there is a navigation bar with the RightSignature logo, a 'Dashboard' button with a folder icon, a 'Send a Document' button with a pen icon, a 'Support' dropdown menu, and a user profile icon labeled 'A'. Below this is a dark grey banner with a yellow 'TRIAL' badge, the text 'Welcome Urdhva!', and 'Get started with online document signing:'. To the right of the banner are two buttons: 'Try Samples' and 'Watch Video'. The main content area is light blue and contains a white box with the title 'Authorization Request for Account Access'. Inside this box, it states 'The following application has requested access to your account:' followed by a grey box containing the application details: 'CRMDocSignature', 'This application integrates RightSignature with SugarCRM and SuiteCRM. Helps in creating and sending Documents for signature from CRM.', and the URL 'http://urdhva-tech.com'. Below this, a paragraph explains that approving the request will allow CRMDocSignature to perform actions on the account. At the bottom of the white box are two buttons: 'Grant Access' and 'or Deny Access'. A 'Security Note' is at the very bottom, advising users not to share their password.

RightSignature™

Dashboard

Send a Document

Support ▾ | A

TRIAL Welcome Urdhva! Get started with online document signing: Try Samples Watch Video

Authorization Request for Account Access

The following application has requested access to your account:

CRMDocSignature
This application integrates RightSignature with SugarCRM and SuiteCRM.
Helps in creating and sending Documents for signature from CRM.
<http://urdhva-tech.com>

Approving this request will allow **CRMDocSignature** to perform actions on your account such as sending documents, listing documents and receiving document updates. If you do not know and trust **CRMDocSignature** or did not initiate this request, please ignore or deny this request.

Grant Access or [Deny Access](#)

Security Note: You should never provide your RightSignature password to any site other than RightSignature.com

eSign Application usage

- Navigate to module “eSign-RightSignature” and click “Send Doc for Signature”. You will have 2 options to send document for signature.

The screenshot displays the eSign application interface. The top navigation bar includes links for ACCOUNTS, CONTACTS, LEADS, TARGETS, QUOTES, and MORE, along with a CREATE button and search, notification, and user icons. The left sidebar shows a 'Send Doc for Signature' button and a 'View Right Signature' button. Below these is a 'Recently Viewed' section listing items like 'Urdhva Quote...', 'Executory Co...', '_Machinery_a...', 'RS: 7', and 'Machinery an...'. The main content area is titled 'SEND DOCUMENT FOR SIGNATURE (RIGHT SIGNATURE)'. It contains several sections: 'Choose a Document' with a text input and a 'Sending Type' dropdown menu (showing 'Send RightSignature Template' and 'Send External File' options), 'People Involved' with a text input and 'Add Signer' and 'Add Cc' buttons, 'Description' with a text input, 'Subject' with a text input, and 'Message' with a text input. At the bottom of the form are 'Send Document for Signature' and 'Cancel' buttons. The Urdhva Tech logo is visible in the bottom left corner.

- The “Send RightSignature Template” list would show you the list of Right Signature templates that you have created in your RightSignature account. You may choose the desired template and send it to Accounts/Contacts/Leads/Prospects
- The “Send External File” lets you send document stored locally to Accounts/Contacts/Leads/Prospects
- You may choose “Add Signer” to send it to anyone other than the CRM entity by simply providing the name and email

address.

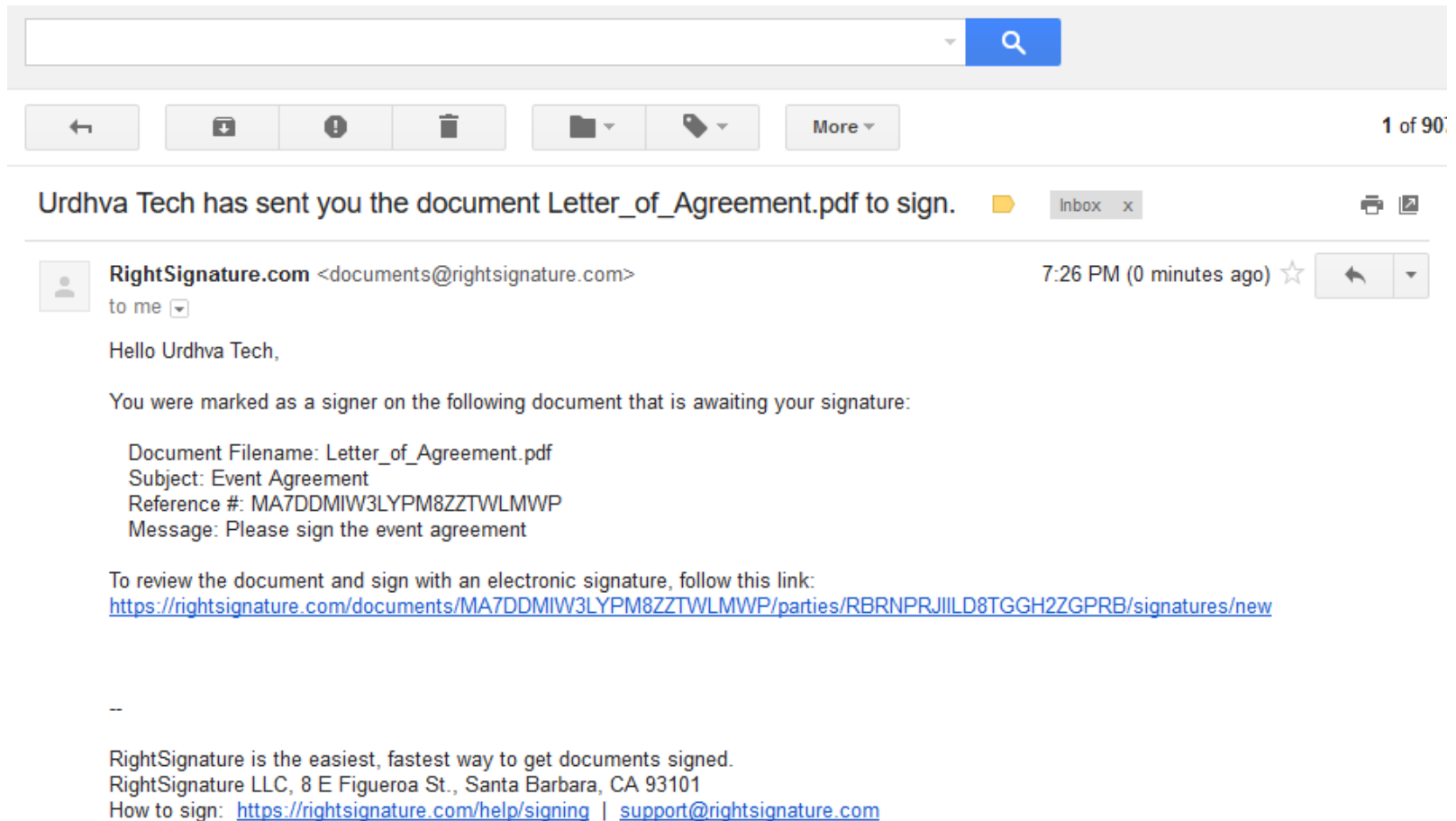
- "Add Signer from CRM" would be the CRM entities (Account/Contact/Lead/Prospect) who would be signing the documents.
- "Add Cc" would be the entities who will be kept in the Cc for the reference of the document that would be sent for signature.
- "Add Cc from CRM" would be the CRM entities (Account/Contact/Lead/Prospect) who will be kept in the Cc for the reference of the document that would be sent for signature.

The screenshot displays the Urdhva Tech CRM interface. A modal titled "SELECT A SIGNER FROM CRM" is open, showing a dropdown menu for "Related To:" with options: Contacts, Accounts, Contacts (highlighted), Leads, and Targets. The selected contact is "Dhaivat Naik". Below the modal, the "People Involved" section is visible, including fields for "President" (Urdhva Tech, contact@urdhva-tech.com) and "Speaker" (Recipient's Name, Recipient's Email). The "Description" field contains "Event Agreement" and the "Message" field contains "Please sign the event agreement".

Urdhva Tech CRM Interface:

- Navigation: ACCOUNTS, CONTACTS, LEADS, TARGETS, QUOTES, MORE
- Actions: Send Doc for Signature, View Right Signature
- Recently Viewed: Urdhva Tech, _Executory_C..., RS:5, Executory Co..., Urdhva Quote...
- Modal: SELECT A SIGNER FROM CRM
 - Related To: Contacts, Accounts, **Contacts**, Leads, Targets
 - Selected: Dhaivat Naik
 - Buttons: Select, Close
- People Involved
 - President: Urdhva Tech, contact@urdhva-tech.com
 - Speaker: Recipient's Name, Recipient's Email
- Description: Add the subject of the document and a personal message to the people involved. (Event Agreement)
- Message: Please sign the event agreement

- The email gets sent out to the signers for signature.



- The Signer opens the link to sign the document.

The screenshot displays the RightSignature web interface. At the top, the browser address bar shows the URL: <https://rightsignature.com/documents/MA7DDMIW3LYPM8ZZTWMWP?a=signed&rt=3126f7914bf4>. The navigation bar includes the RightSignature logo, a 'Dashboard' button, a 'Send a Document' button, and links for 'Support', 'Account', 'UPGRADE', and 'Log Out'.

A dark banner below the navigation bar contains a 'TRIAL' badge, the text 'Welcome Urdhva!', and a link to 'Get started with online document signing:'. To the right of this banner are buttons for 'Try Samples', 'Watch Videos', and 'Dismiss Tour'.

The main content area is titled 'View Document' and features a green 'COMPLETE' button. A blue 'SIGNED' banner is in the top-left corner of the document preview. The document is titled 'LETTER OF AGREEMENT' and contains the following text:

This letter serves as a formal agreement between Student Organization and Speaker, whereby Speaker will provide professional services of Implementation.

Speaker is being sponsored by the Student Organization and will be compensated for services provided in the amount of 1500. Payment will be disbursed upon completion of services.

Please sign both copies of this agreement. Retain one copy for your file and return one copy to the Student Organization (or specific office).

The document shows two signature lines. The first line is for the 'President's Signature' with a date of '06/23/2017'. The second line is for the 'Student Organization Name' with a date of '06/23/2017'. The text 'testvalue' is visible above the second signature line.

On the right side, the 'DOCUMENT DETAILS' panel shows the document ID 'Ref#: MA7DDMIW3LYPM8ZZTWMWP', the subject 'Event Agreement', and the message 'Please sign the event agreement'. It lists two signers: 'Urdhva Tech' and 'Dhaivat Naik', both signed on '06/23/2017 07:32 PM'. The panel also shows the document was 'SENT' on '06/23/17 at 07:26 PM' and 'COMPLETED' on '06/23/17 at 07:37 PM'. A 'Source File' section includes a 'PDF DOWNLOAD' button.

At the bottom left, a log of events is visible:

- 06/23/2017 07:37PM IST: All parties have signed document. Signed copies sent to: Dhaivat Naik, Urdhva Tech, and Urdhva Tech.
- 06/23/2017 07:37PM IST: Document signed by Dhaivat Naik (dhaivat.naik@urdhva-tech.com) with drawn signature. - 49.34.149.188
- 06/23/2017 07:32PM IST: Document viewed by Dhaivat Naik (dhaivat.naik@urdhva-tech.com). - 49.34.149.188

At the bottom right, a 'DOCUMENT LOCKED' status is shown with a padlock icon.

- As the document is viewed or signed, the Activities are being logged in the CRM under the “RS-Activities” subpanel and RS Document Packet and the Status of the Document gets updated as it gets completed.

CONTACTSLEADSTARGETSQUOTESMORE

CREATE

RS : 6

BASIC

ACTIONS

Name:

RS : 6

Sending Type:

RightSignature Template

RightSignature Templ

Event Agreement

RS Doc Id:

MA7DDMIW3LYPM8ZZTWMWP

Subject:

Event Agreement

Message:

Please sign the event agreement

State:

Signed

Processing state:

Done-Processing

Created at:

06/23/2017 19:26

Completed at:

06/23/2017 19:37

Expires on:

07/24/2017 05:30

Original File:

Letter_of_Agreement.pdf

Signed file:

Letter_of_Agreement.pdf

Original URL:

https://s3.amazonaws.com/docs.rightsignature.com/assets/24564708/Letter_of_Agreement.pdf?AWSAccessKeyId=AKIAIQO2I3KXFJPHOZAQ&Expires=1498486078&Signature=XnsR3aW9zkhuyIPdrgrzPAgZQXI%3D


PDF URL:

https://s3.amazonaws.com/docs.rightsignature.com/assets/24564708/Letter_of_Agreement.pdf?AWSAccessKeyId=AKIAIQO2I3KXFJPHOZAQ&Expires=1498486078&Signature=XnsR3aW9zkhuyIPdrgrzPAgZQXI%3D

Signed PDF URL:

https://s3.amazonaws.com/docs.rightsignature.com/assets/24564708/Letter_of_Agreement-signed.pdf?AWSAccessKeyId=AKIAIQO2I3KXFJPHOZAQ&Expires=1498486078&Signature=4%2B2YBbHOwoReb7gZYL8IIFZsN4g%3D

Thumbnail:



Size (KB):

97,900.00

Assigned to:

Administrator

Publish Date:

06/23/2017

Description:

Note : Signed document gets saved as a Notes Attachment in CRM which is related to the Document Packet.

- **RS-Activities Subpanel** : Lists the activities (Viewed/Signed) happened for the document packet by each signer.

RS - ACTIVITIES

Summary	Keyword	Created At	Date Modified	
Doc-Packet RS : 6	Document created via the RightSignature API by Urdhva Tech (contact@urdhva-tech.com).	Created	06/23/2017 19:26	06/23/2017 19:37 Edit
Doc-Packet RS : 6	Document viewed by Urdhva Tech (contact@urdhva-tech.com).	Viewed	06/23/2017 19:27	06/23/2017 19:37 Edit
Doc-Packet RS : 6	Document signed by Urdhva Tech (contact@urdhva-tech.com) with drawn signature.	Signed	06/23/2017 19:32	06/23/2017 19:37 Edit
Doc-Packet RS : 6	Document viewed by Dhaivat Naik (dhaivat.naik@urdhva-tech.com).	Viewed	06/23/2017 19:32	06/23/2017 19:37 Edit
Doc-Packet RS : 6	Document signed by Dhaivat Naik (dhaivat.naik@urdhva-tech.com) with drawn signature.	Signed	06/23/2017 19:37	06/23/2017 19:37 Edit
Doc-Packet RS : 6	All parties have signed document. Signed copies sent to: Dhaivat Naik, Urdhva Tech, and Urdhva Tech.	Complete	06/23/2017 19:37	06/23/2017 19:37 Edit

ACCOUNTS +
CONTACTS +
LEADS +
TARGETS +

- **Signers Subpanel** : Lists the entities involved with the document for Signing and Cc.

RS - SIGNERS						
Recipient Name	Recipient_email	Module	Related to	Role	Date Modified	
(1 - 2 of 2)						
Urdhva Tech	contact@urdhva-tech.com	Accounts	Urdhva Tech	President	06/23/2017 19:26	Edit
Dhaivat Naik	dhaivat.naik@urdhva-tech.com	Contacts	Dhaivat Naik	Speaker	06/23/2017 19:26	Edit

➤ **Module list “eSign-RightSignature” :**

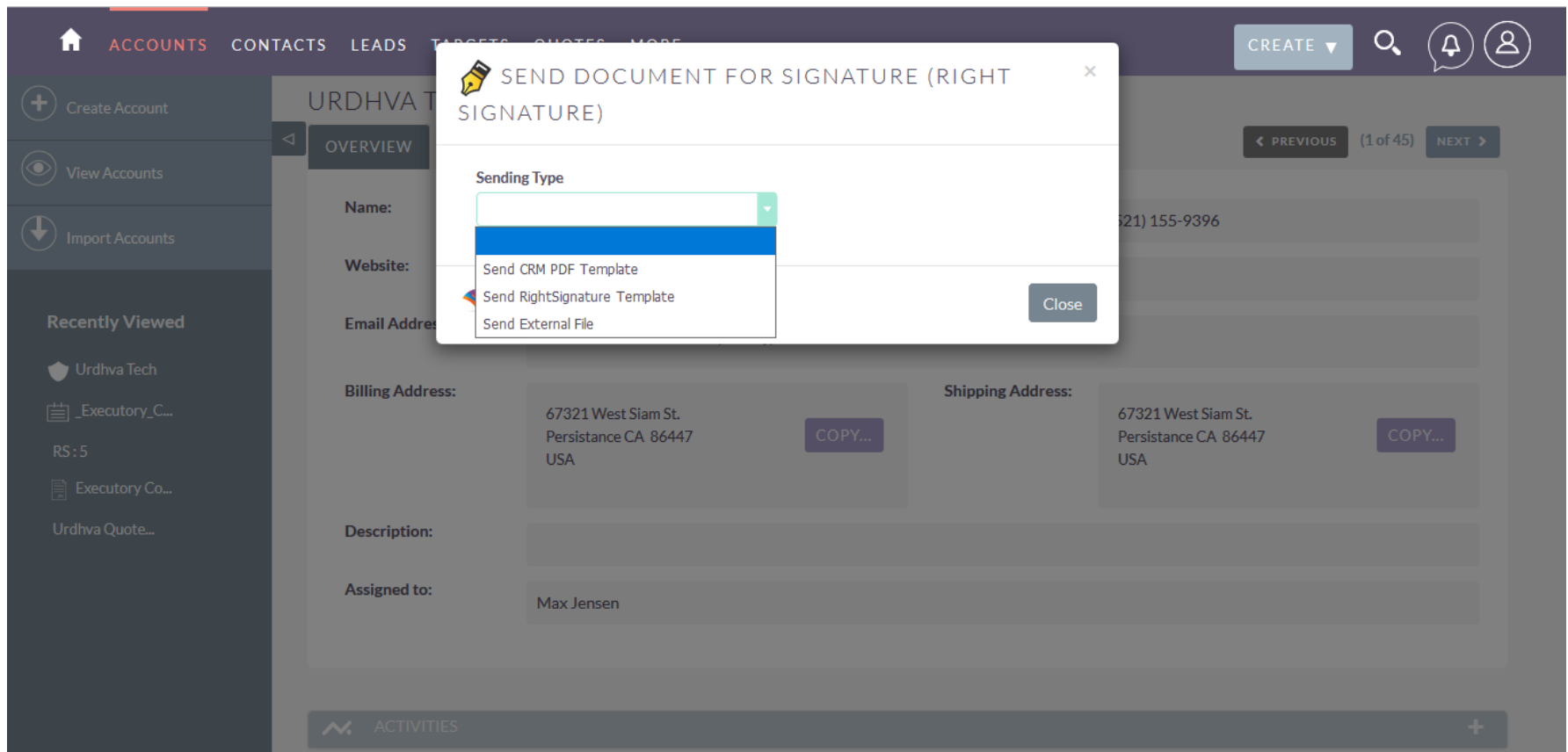
Show all the list of the documents sent for signature.

The screenshot displays the 'eSign - RIGHTSIGNATURE' module interface. The top navigation bar includes links for ACCOUNTS, CONTACTS, LEADS, TARGETS, QUOTES, and MORE, along with a CREATE button and search, notification, and user icons. The left sidebar contains a 'Send Doc for Signature' button and a 'View Right Signature' button. Below these is a 'Recently Viewed' section listing documents like '_Executory_C...', 'RS:5', 'Executory Co...', 'Urdhva Quote...', and '_Machinery_a...'. The main content area shows a table of documents sent for signature. The table has columns for Number, Name, Module, Recipient's Name, Recipient Email, State, Sending Type, RightSignature Templates, Publish Date, and Expires on. There are five rows of data, each with a checkbox, a pencil icon, and a status indicator (RS: 5, RS: 4, RS: 3, RS: 2, RS: 1). The first four rows are marked 'Signed' and the fifth is marked 'Pending'. Below the table is a 'Security Groups: Mass Assign' section with ASSIGN and REMOVE buttons and a Group dropdown menu set to '--None--'. The footer shows 'Supercharged by SuiteCRM' and 'Powered By SugarCRM'.

Number	Name	Module	Recipient's Name	Recipient Email	State	Sending Type	RightSignature Templates	Publish Date	Expires on
5	RS: 5	Executory Contract	Mr. Dhaivat Naik	dhaivat.naik@urdhva-tech.com	Signed	CRM PDF Template		06/23/2017	07/24/2017 05:30
4	RS: 4	Machinery and Spares	Mr. Dhaivat Naik	dhaivat.naik@urdhva-tech.com	Signed	CRM PDF Template		06/23/2017	07/24/2017 05:30
3	RS: 3		-- Multiple Recipient --	-- Multiple Recipient --	Signed	RightSignature Template	Event Agreement	06/23/2017	07/24/2017 05:30
2	RS: 2		-- Multiple Recipient --	-- Multiple Recipient --	Signed	External File		06/23/2017	07/24/2017 05:30
1	RS: 1		-- Multiple Recipient --	-- Multiple Recipient --	Signature Pending	External File		06/23/2017	07/24/2017 05:30

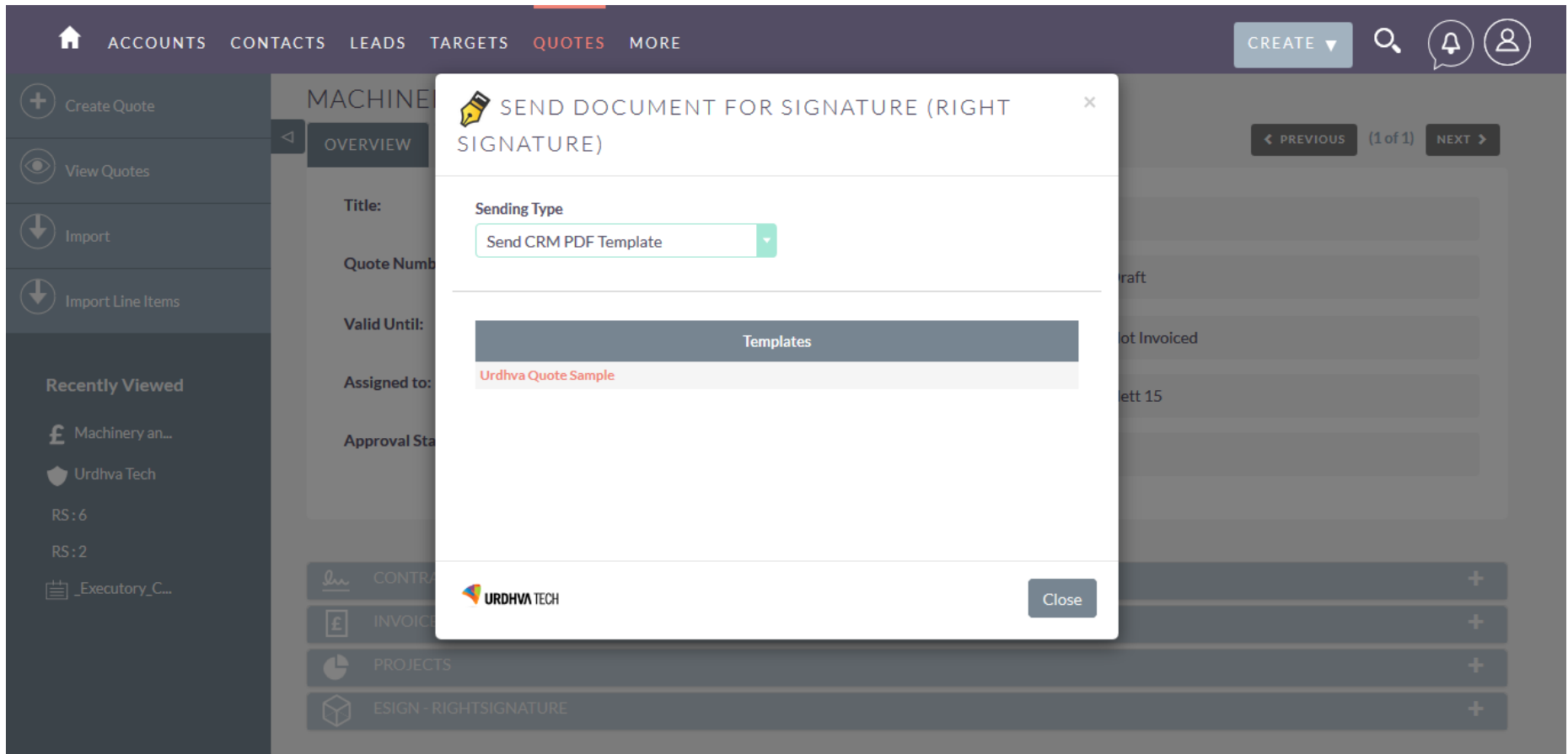
➤ Sending Options Available on Accounts/Contacts/Leads/Prospects

- **"Send CRM PDF Templates"** : Choose the CRM PDF Template, which gets parsed and sent for the signature. You can add the Signature box in your template where you want the Signature to be placed.
Use "{rightsignature_signbox}" variable in your PDF Template for capturing the signature on the document.
- **"Send Right Signature Template"** : List of RightSignature templates would be shown and will be available to send for signatures.
- **"Send External File"** : Browse local file and send it for signature. Supported file types, .doc, .docx, .txt, .jpeg, .png



➤ Sending Option Available for Quotes and Contracts

- **"Send CRM PDF Templates"** : Choose the CRM PDF Template, which gets parsed and sent for the signature.



- You can add the Signature box in your template where you want the Signature to be placed. Use “{rightssignature_signbox}” variable in your PDF Template for capturing the signature on the document.

The screenshot shows a software interface for creating PDF templates. The sidebar on the left contains the following options:

- Create PDF Template
- View PDF Templates
- Import

The main area displays a form with the following fields and tables:

\$aos_quotes_billing_address_street	
\$aos_quotes_billing_address_city	
\$aos_quotes_billing_address_state	
\$aos_quotes_billing_address_postalcode	
Quotation Date	Valid Until
\$aos_quotes_date_entered	\$aos_quotes_expiration
Quote Number	Payment Terms
\$aos_quotes_number	\$aos_quotes_term

Quantity	Product	Description	List
\$aos_products_quotes_product_qty	\$aos_products_quotes_name	\$aos_products_description	\$aos_products_quotes_product_list_r
\$aos_services_quotes_name			\$aos_services_quotes_service_list_pr

A red arrow points to a text box containing the variable `{rightssignature_signbox}`. A callout box states: "Use this variable in your pdf template for capturing the signature".

Footer:

Page {PAGENO} {DATE m/d/Y}

- The sent Quote/Contract using the CRM PDF template with signature box would be parsed on RightSignature, as shown below

Urdhva Tech has requested your e-signature on the documents below. Please review, fill-out, and sign.

HOME RightSignature

Sign Document

YOUR PROGRESS

WHAT TO DO NEXT: Read then scroll to **Page 0** NEED HELP?

07/22/2017 West Sign St.
Persistence
CA 86447

Quotation Date	Valid Until
06/22/2017	07/22/2017
Quote Number	Payment Terms
1	Nett 15

Quantity	Product	Description	List	Discount	Sale Price	Tax	Total
		Machines and Services	25,000.00		25,000.00	0%	25,000.00
						Total	25,000.00
						Discount	0.00
						Subtotal	25,000.00
						Tax	0.00
						Shipping	0.00
						Grand Total	25,000.00

Signature Here... SIGN

X I agree to the Terms of Use and Consumer Disclosure to the right, and all pages above.

SUBMIT SIGNATURE

DOCUMENT DETAILS

RIGHTTRACK

Ref#: PGJMKPISBIB2A9INSM8YUN

SUBJECT: Urdhva Quote Sample
MESSAGE: Urdhva Quote Sample

Parties

Urdhva Tech
contact@urdhva-tech.com

Mr. Dhaivat Naik (you)
dhaivat.naik@urdhva-tech.com

SENT 06/23/17 at 07:46PM EXPIRES 07/24/17 at 05:30AM

Source File

PDF DOWNLOAD

Sender Options

Photo Authentication optional

[Consumer Disclosure](#)
[Terms of Use](#) [Privacy Policy](#)

➤ Dashboard: Chart and RS – Activities

ACCOUNTS

CONTACTS

LEADS

TARGETS

QUOTES

MORE

CREATE

Recently Viewed

Machinery_a...

RS: 7

Machinery an...

Urdhva Tech

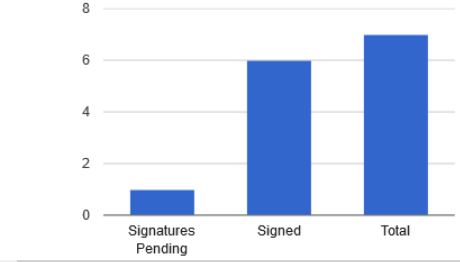
RS: 6

SUITECRM DASHBOARD

ACTIONS

RIGHT SIGNATURE CHART

RightSignature Document packets summary



Category	Count
Signatures Pending	1
Signed	6
Total	7

MY CALLS

(1 - 1 of 1)

Close	Subject	Related to	Start Date	Accept?	Status
X	Executory Contract Contract Renewal Reminder	Urdhva Tech	06/08/2018 12:00		Planned

MY ACCOUNTS

(0 - 0 of 0)

Name	Type	Website	Phone	Billing Country
No Data				

RS - ACTIVITIES

(1 - 10 of 33)

Summary	Date Created
Doc-Packet RS: 7 All parties have signed document. Signed copies sent to: Urdhva Tech and Mr. Dhaivat Naik.	06/23/2017 19:51
Doc-Packet RS: 7 Document created via the RightSignature API by Urdhva Tech (contact@urdhva-tech.com).	06/23/2017 19:51
Doc-Packet RS: 7 Document viewed by Mr. Dhaivat Naik (dhaivat.naik@urdhva-tech.com).	06/23/2017 19:51
Doc-Packet RS: 7 Document signed by Mr. Dhaivat Naik (dhaivat.naik@urdhva-tech.com) with drawn signature.	06/23/2017 19:51
Doc-Packet RS: 6 Document signed by Urdhva Tech (contact@urdhva-tech.com) with drawn signature.	06/23/2017 19:37
Doc-Packet RS: 6 All parties have signed document. Signed copies sent to: Dhaivat Naik, Urdhva Tech, and Urdhva Tech.	06/23/2017 19:37
Doc-Packet RS: 6 Document signed by Dhaivat Naik (dhaivat.naik@urdhva-tech.com) with drawn signature.	06/23/2017 19:37
Doc-Packet RS: 6 Document created via the RightSignature API by Urdhva Tech (contact@urdhva-tech.com).	06/23/2017 19:37
Doc-Packet RS: 6 Document viewed by Urdhva Tech (contact@urdhva-tech.com).	06/23/2017 19:37
Doc-Packet RS: 6 Document viewed by Dhaivat Naik (dhaivat.naik@urdhva-tech.com).	06/23/2017 19:37

MY MEETINGS

(0 - 0 of 0)

Close	Subject	Related to	Start Date	Accept?
No Data				

Supercharged by SuiteCRM

Powered By SugarCRM

BACK TO TOP



URDHVA TECH

CONTACT US



CONTACT@URDHVA-TECH.COM



[URDHVATECH](https://t.me/URDHVATECH)



[@URDHVATECH](https://twitter.com/URDHVATECH)