eSign – RightSignature

Version 1.0

URDHVA TECH
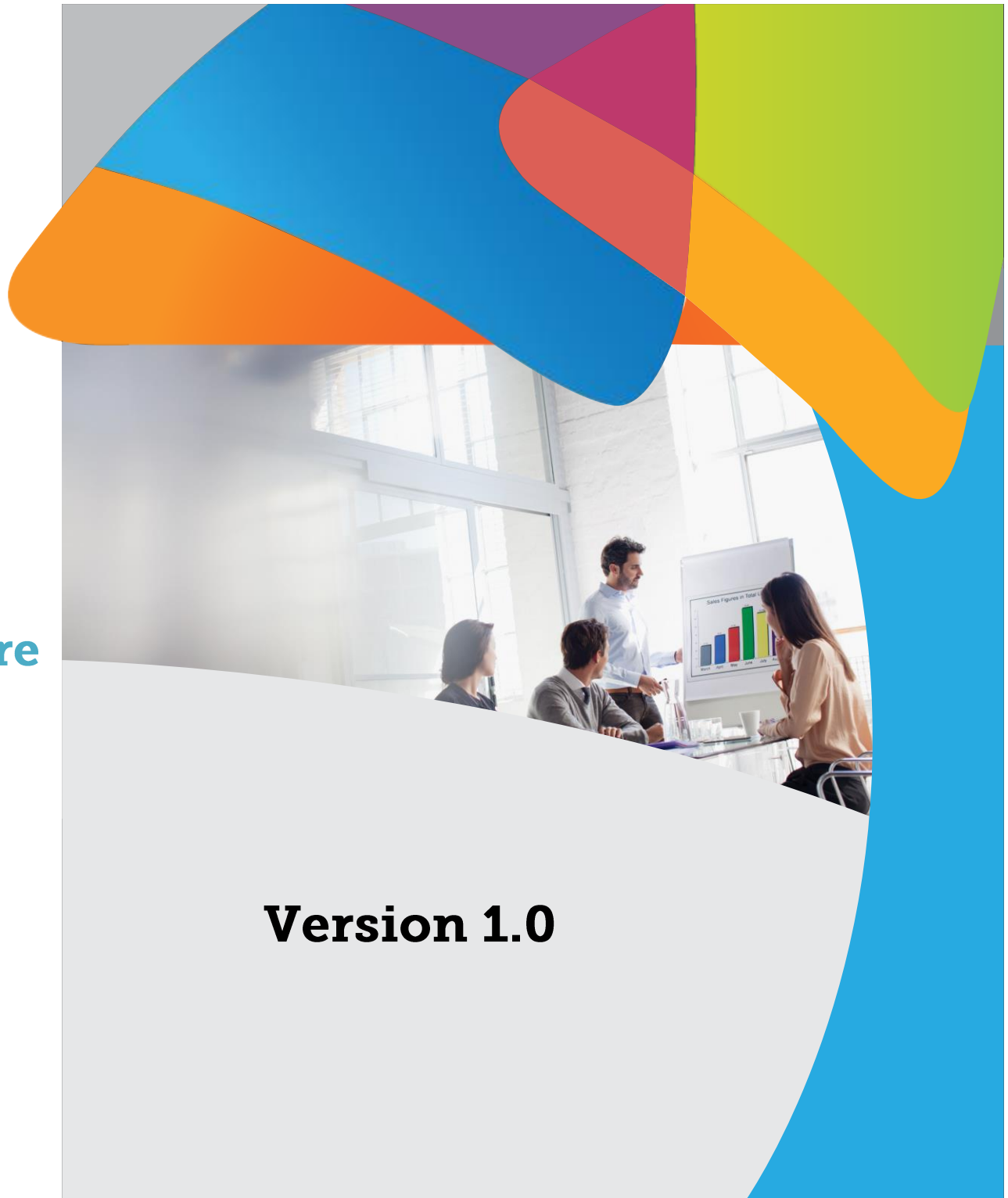
How to get the plugin?

➢ For SuiteCRM, Buy it from the link below.
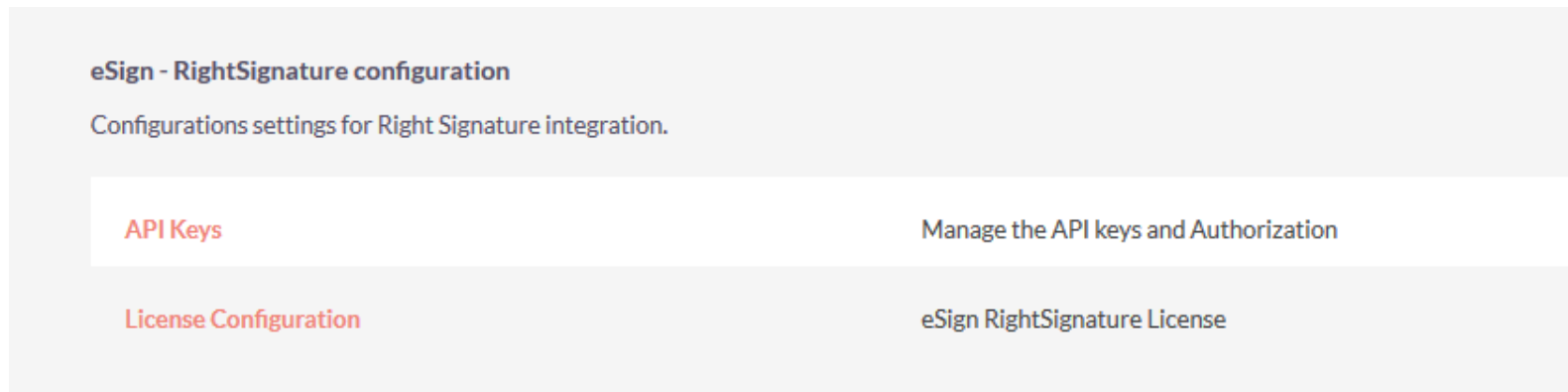
eSign-RightSignature - SuiteCRM Store

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.

eSign - RightSignature configuration

Configurations settings for Right Signature integration.

API Keys	Manage the API keys and Authorization
License Configuration	eSign RightSignature License

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

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
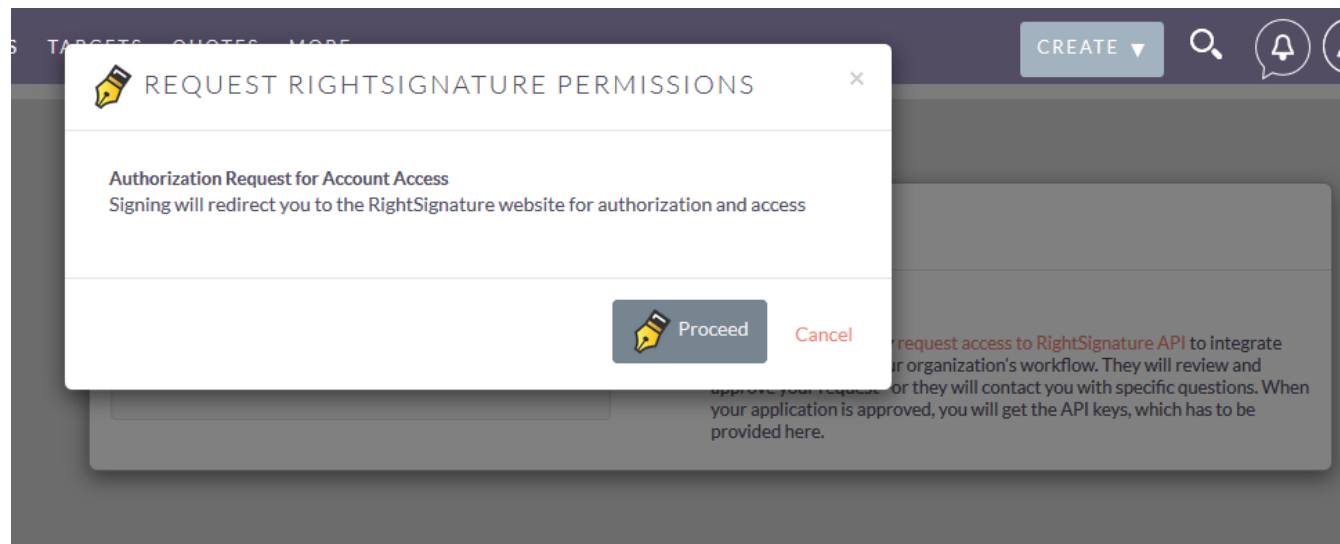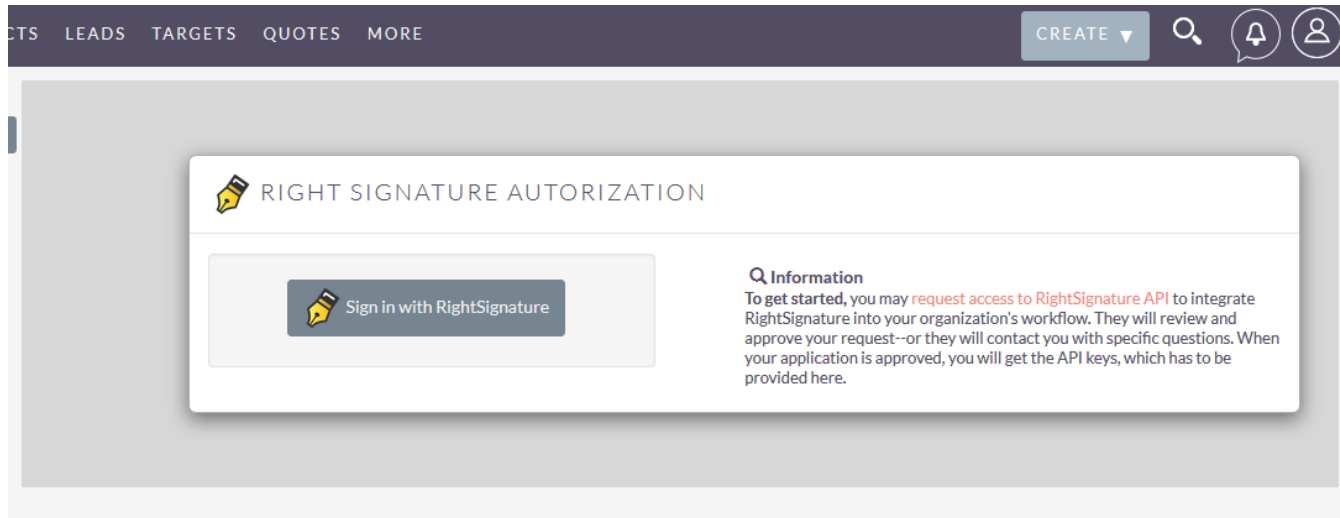
https://rightsignature.com/oauth_clients/new

➤ You will receive the "Consumer Key" and "Consumer Secret key" as the application gets approved by RightSignature.
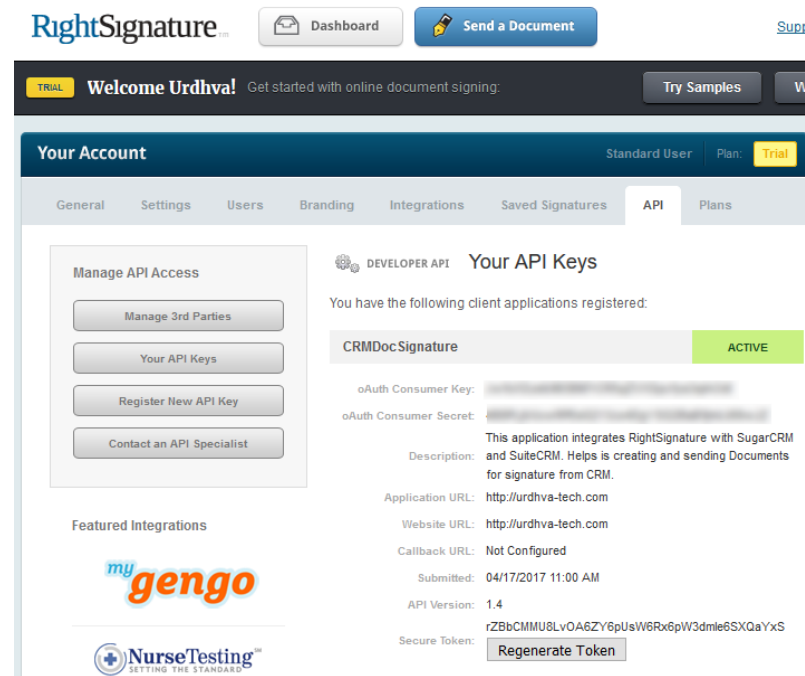
➤ Navigate to Admin -> "eSign-RightSignature Configuration" and Provide the "API Keys"
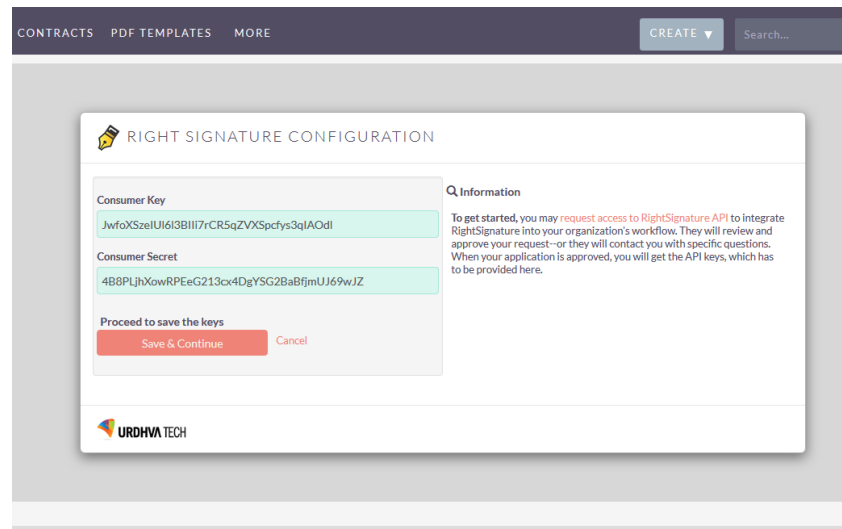
➤ Proceed to Sign in with RightSignature and authorize the Application.

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

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 **"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 then the CRM entity by simply providing the name and email
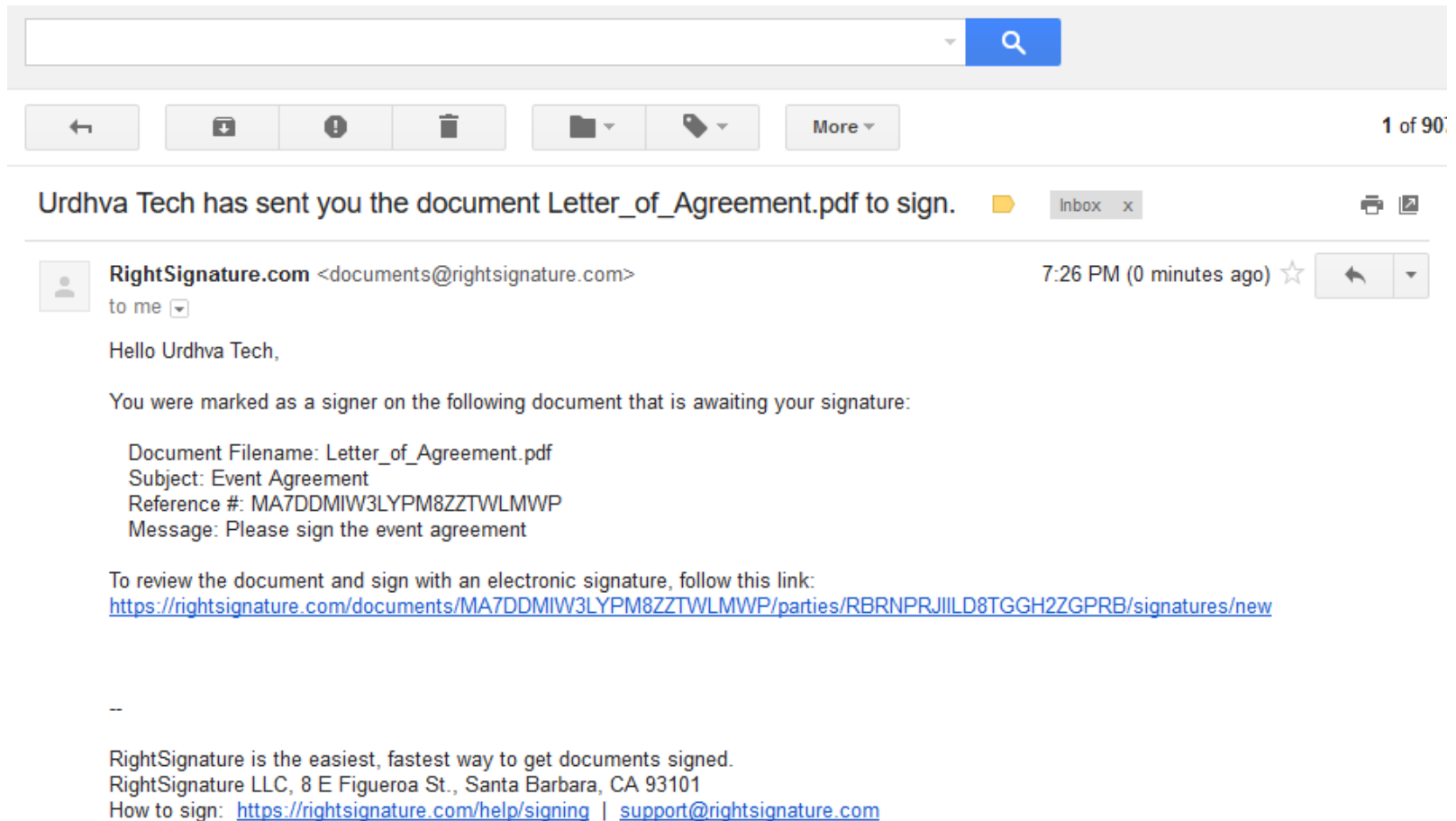
address.

➢ **"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 email gets sent out to the signers for signature.

Urdhva Tech has sent you the document Letter_of_Agreement.pdf to sign.   Inbox   x

RightSignature.com <documents@rightsignature.com>   7:26 PM (0 minutes ago)
to me

Hello Urdhva Tech,

You were marked as a signer on the following document that is awaiting your signature:

    Document Filename: Letter_of_Agreement.pdf
    Subject: Event Agreement
    Reference #: MA7DDMIW3LYPM8ZZTWLMWP
    Message: Please sign the event agreement

To review the document and sign with an electronic signature, follow this link:
https://rightsignature.com/documents/MA7DDMIW3LYPM8ZZTWLMWP/parties/RBRNPRJIILD8TGGH2ZGPRB/signatures/new

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RightSignature is the easiest, fastest way to get documents signed.
RightSignature LLC, 8 E Figueroa St., Santa Barbara, CA 93101
How to sign: https://rightsignature.com/help/signing | support@rightsignature.com

➢ The Signer opens the link to sign the document.

➤ 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.

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.

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

➤ Module list "eSign-RightSignature" :

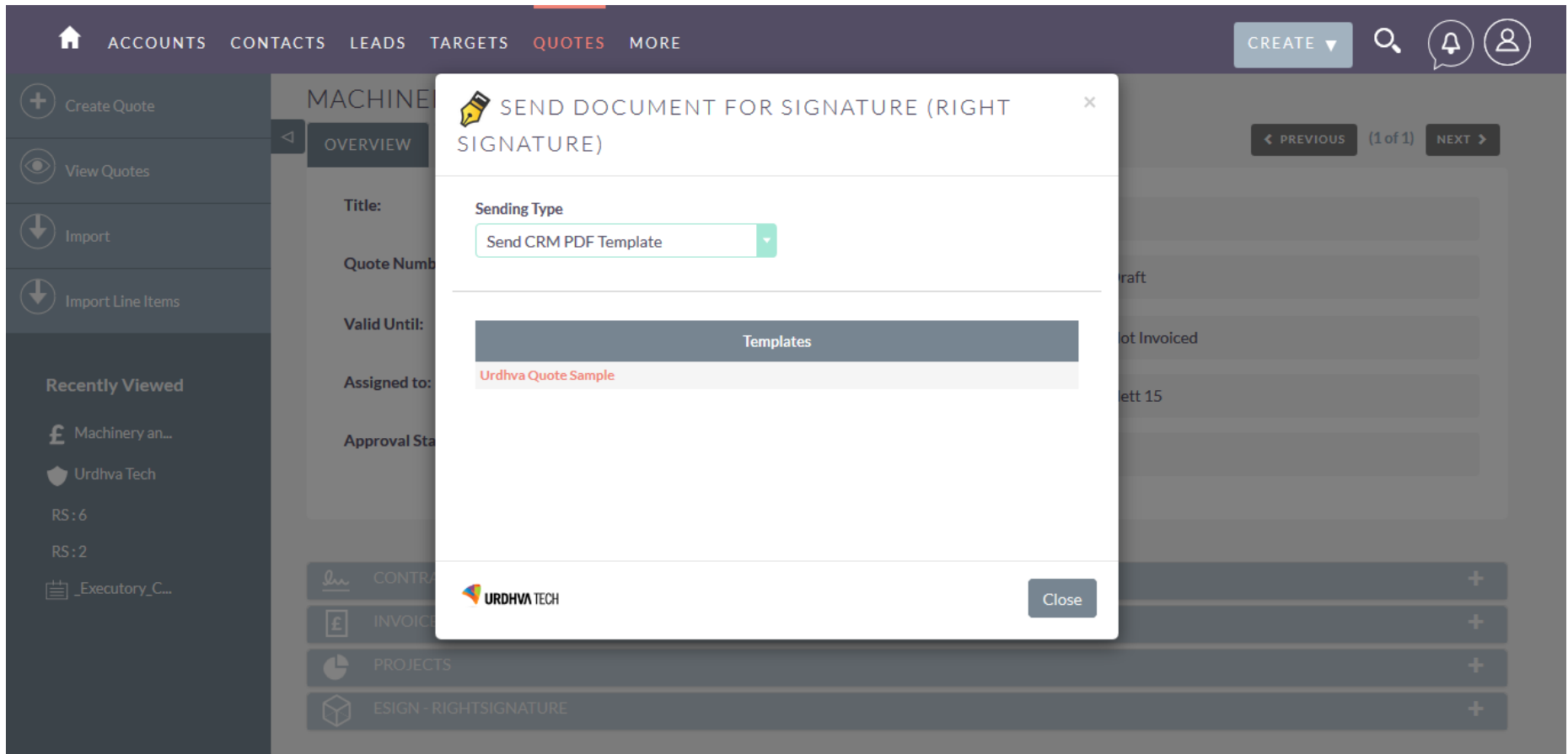Show all the list of the documents sent for signature.

➤ 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
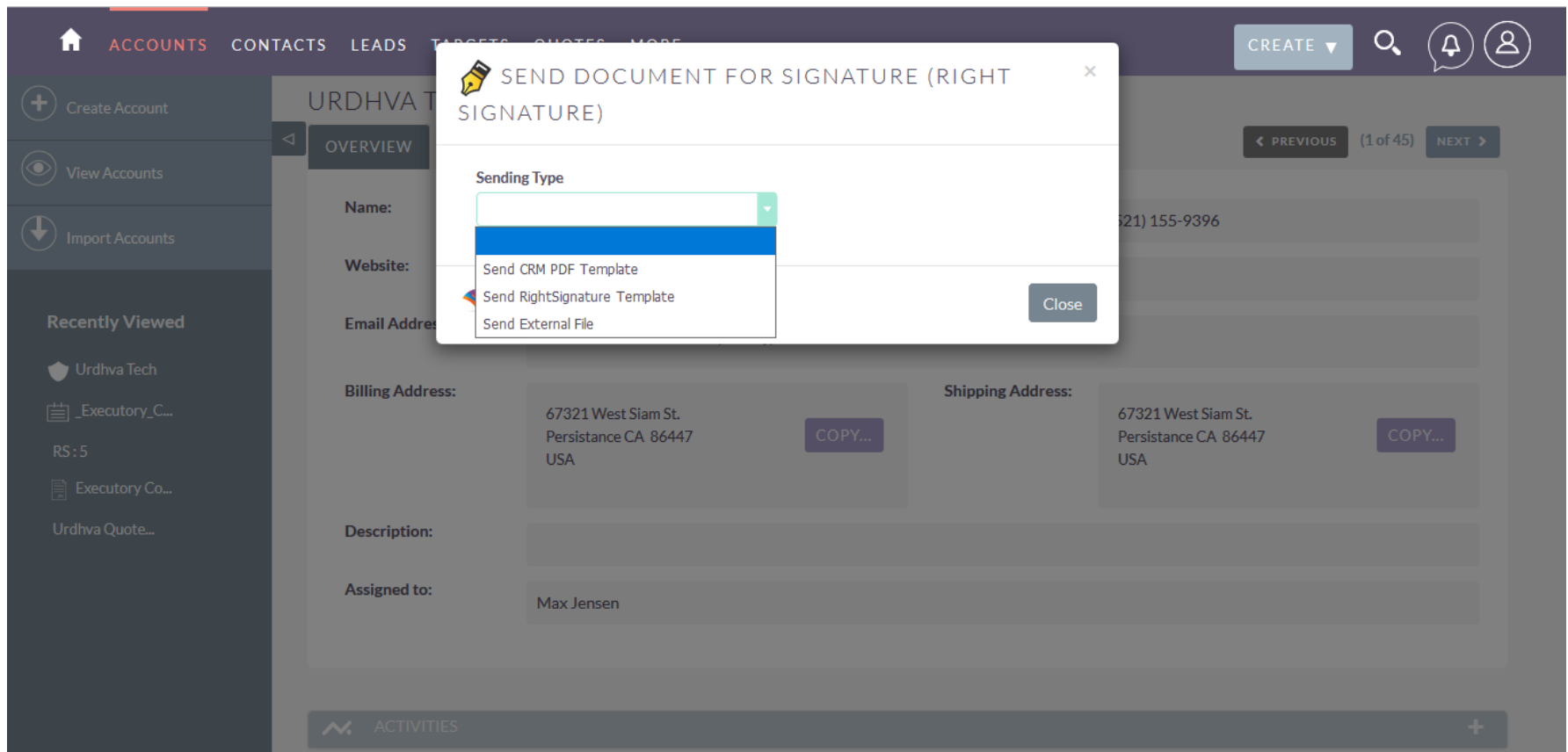
Sending Option Available for Quotes and Contracts

- **"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 "{rightsignature_signbox}" variable in your PDF Template for capturing the signature on the document.

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

➢ Dashboard: Chart and RS – Activities

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CONTACT US

✉ CONTACT@URDHVA-TECH.COM

Ⓢ URDHVATECH

🐦 @URDHVATECH