



Easy Online Document Signing

## **RightSignature API Workflows**

Online Documentation:

<https://rightsignature.com/apidocs/overview>

API Support:

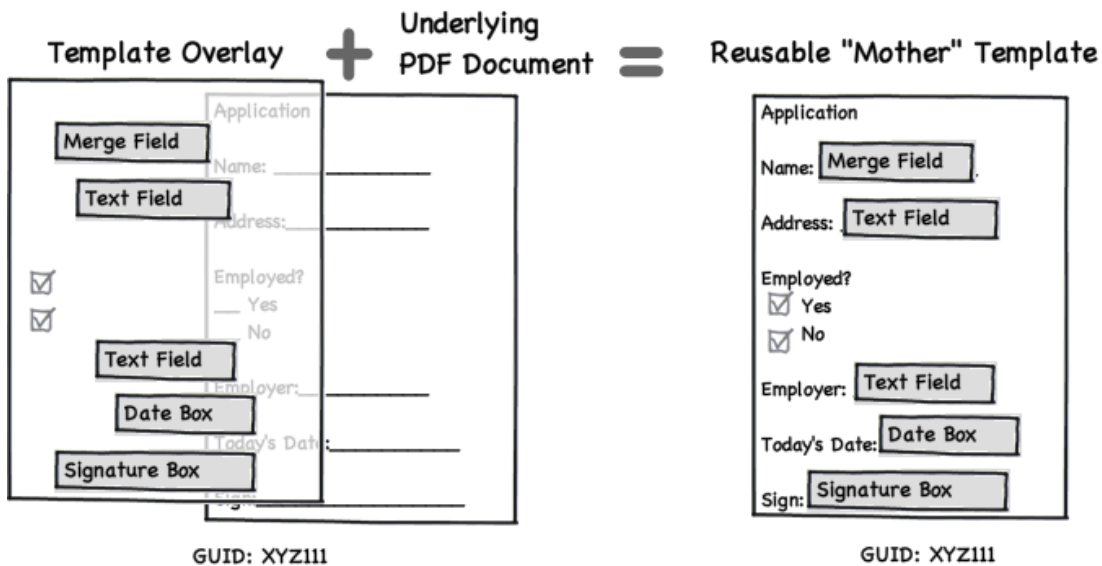
[support@rightsignature.com](mailto:support@rightsignature.com)

1-800-921-4250

# RightSignature Basic Concepts

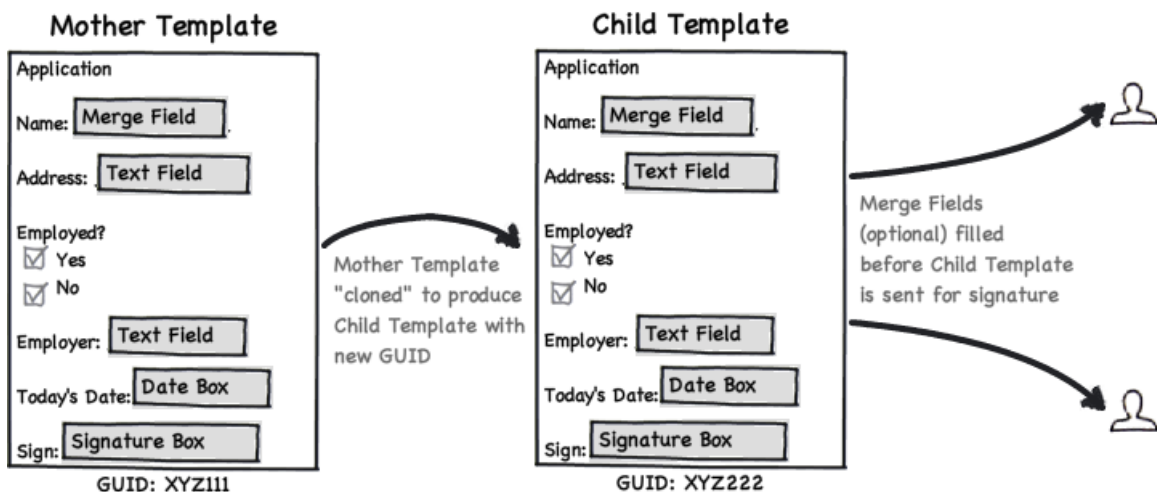
## What is a Reusable Template?

A Reusable Template is a "mother" document from which a "child", or clone, is generated and sent to a specific signer(s). A Reusable Template consists of 2 layers: 1) An underlying document (usually a PDF); and 2) A Template Overlay that may contain merge fields for the sender to fill (prior to sending) in addition to text fields, check boxes, date fields, initial boxes, and signature boxes that the signer(s) must complete.



## What does it mean to send a Reusable Template for Signature?

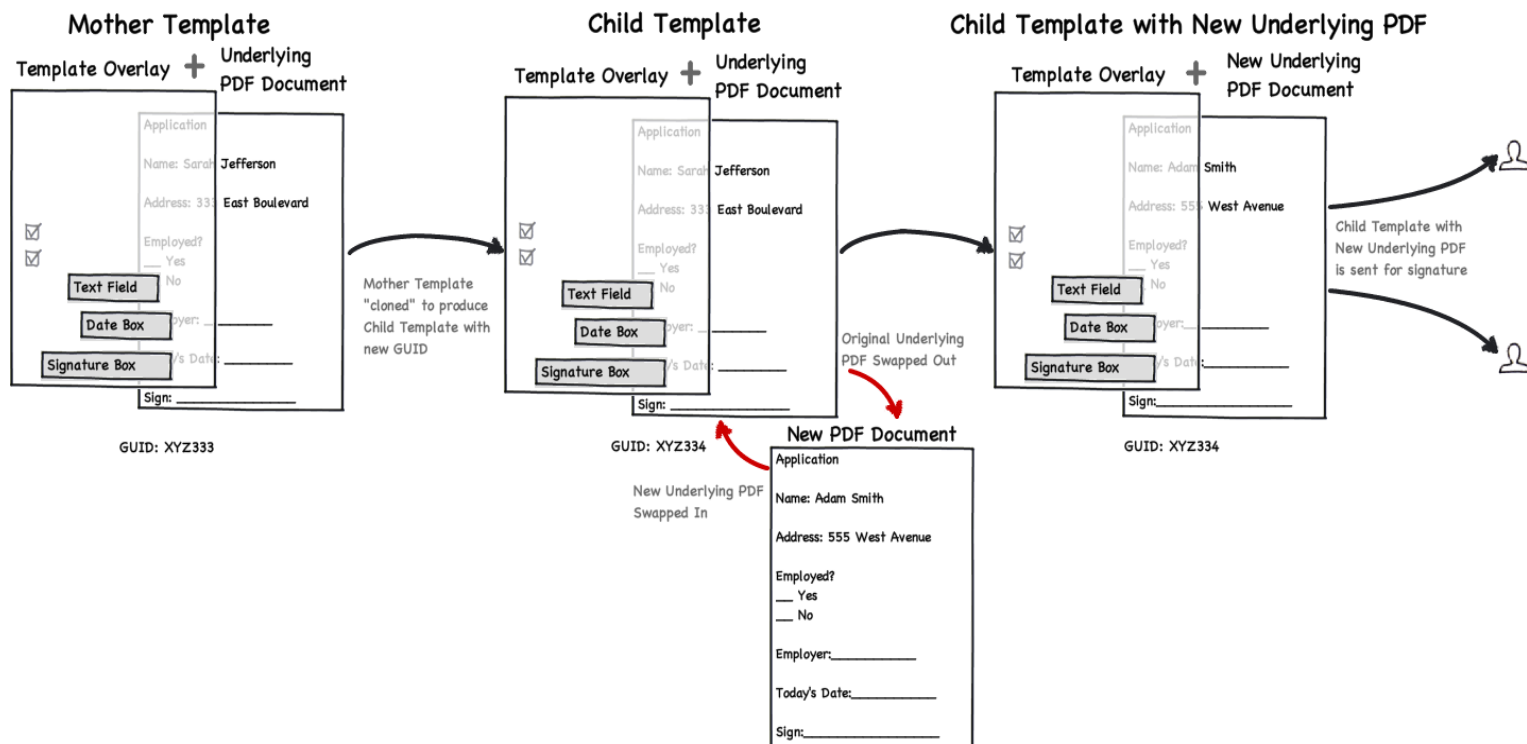
To send a Reusable Template for signature, the Mother Template is cloned to produce a Child Template. The Child Template has a new GUID, but contains the same Template Overlay and Underlying PDF Document as the Mother Template.



## What does it mean to swap the Underlying PDF before sending a Template?

The PDF swap feature is typically employed in cases where RightSignature's merge fields are not utilized. Instead, the PDF swap feature enables you to generate a custom PDF in a separate system, transmit the custom PDF to RightSignature, and then apply a Template Overlay to it before sending for signature.

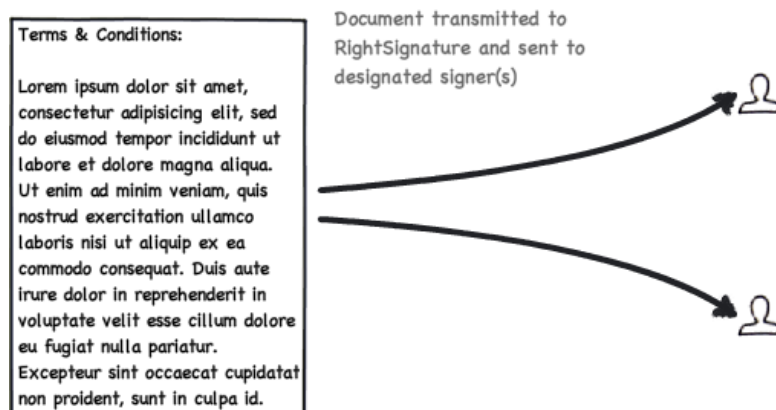
*API Workflows 4, 5, and 6 include the PDF swap feature.*



## What does it mean to send a One-Off Document for signature?

The option to send a One-Off Document is typically employed when the signer(s) is required to review and simply sign a document, rather than provide additional information.

*In API Workflow 7, the document is sent without a Template Overlay, and the signatures appear only on the Signature Certificate (appended to all RightSignature executed documents in all workflows), not inside the document itself. In API Workflow 8, the Sender User manually creates the Overlay by placing text fields, check boxes, date fields, initial boxes, and signature boxes on the One-Off Document.*



# RightSignature API Workflow Table of Contents

API Workflow	Send	Input Method for Merge Field Data, Roles, Subject, and Message “Instance Information”	Sent By	Signature Event
1	Template(s)	Prefilled by Sender System	Sender System	On RS URL
2	Template(s)	Partially prefilled by Sender System; Sender User redirected to RS URL to provide and/or edit Instance Information	Sender User from RS URL	On RS URL
3	Template(s)	Sender User redirected to RS URL to provide all Instance Information	Sender User from RS URL	On RS URL
4	Template and Swap Underlying Document	Prefilled by Sender System	Sender System	On RS URL
5	Template and Swap Underlying Document	Partially prefilled by Sender System; Sender User redirected to RS URL to provide and/or edit Instance Information	Sender User from RS URL	On RS URL
6	Template and Swap Underlying Document	Sender User redirected to RS URL to provide all Instance Information	Sender User from RS URL	On RS URL
7	One-Off Document	Roles, Subject, Message prefilled by Sender System; No text fields or signature boxes on Document	Sender System	On RS URL
8	One-Off Document	Roles, Subject, Message prefilled by Sender System; Sender User redirected to RS URL to edit Instance Information and/or place text fields and signature boxes	Sender User from RS URL	On RS URL
9	Template(s)	Prefilled by Sender System	Sender System	Embedded: Signer receives link, signs on Sender URL
10	Template(s)	Partially prefilled by Sender System; Sender User redirected to RS URL to provide and/or edit Instance Information	Sender User from RS URL	Embedded: Signer receives link, signs on Sender URL
11	Template(s)	Sender User redirected to RS URL to provide all Instance Information	Sender User from RS URL	Embedded: Signer receives link, signs on Sender URL
12	Template(s)	Prefilled by Sender System	Sender System	Embedded: Signer logs in to Sender website, signs on Sender URL
13	Template(s)	Partially prefilled by Sender System; Sender User redirected to RS URL to provide and/or edit Instance Information	Sender User from RS URL	Embedded: Signer logs in to Sender website, signs on Sender URL
14	Template(s)	Sender User redirected to RS URL to provide all Instance Information	Sender User from RS URL	Embedded: Signer logs in to Sender website, signs on Sender URL
15	One-Off Document	Roles, Subject, Message prefilled by Sender System; text fields and signature boxes set with Text Tags	Sender System	On RS URL
16	One-Off Document	Roles, Subject, Message prefilled by Sender System; text fields and signature boxes set with Text Tags	Sender System	Embedded: Signer receives link, signs on Sender URL
17	One-Off Document	Roles, Subject, Message prefilled by Sender System; text fields and signature boxes set with Text Tags	Sender System	Embedded: Signer logs in to Sender website, signs on Sender URL

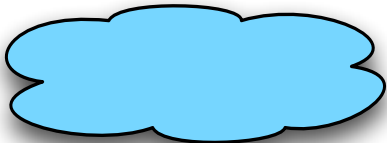
# API Flowchart Object Legend



Sender System



RightSignature API



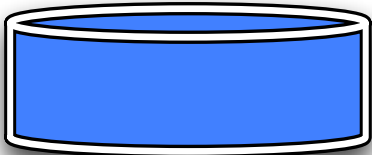
RightSignature Cloud Processing



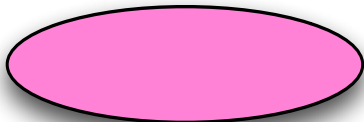
Sender User



Signer

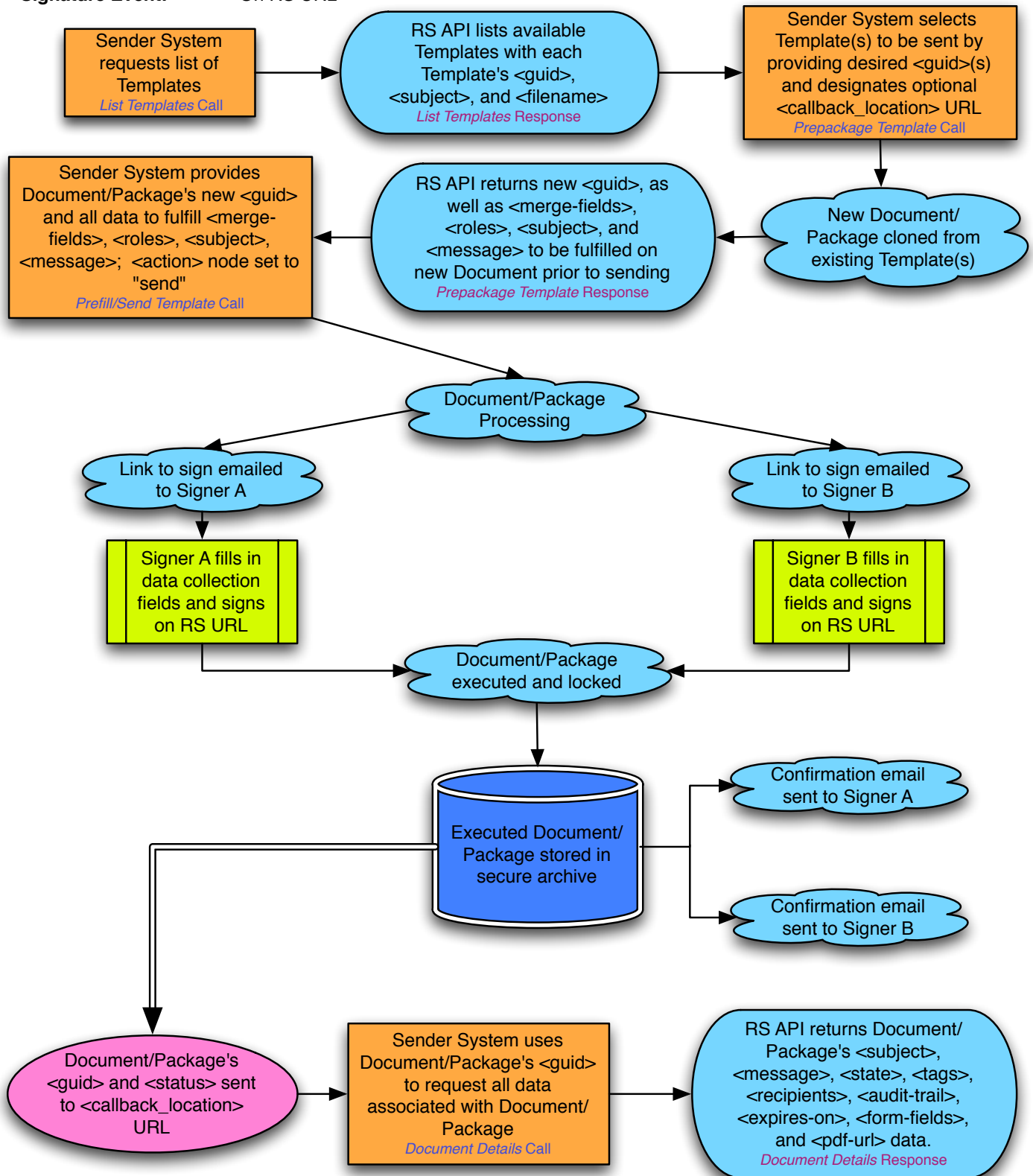


RightSignature Secure Document Archive

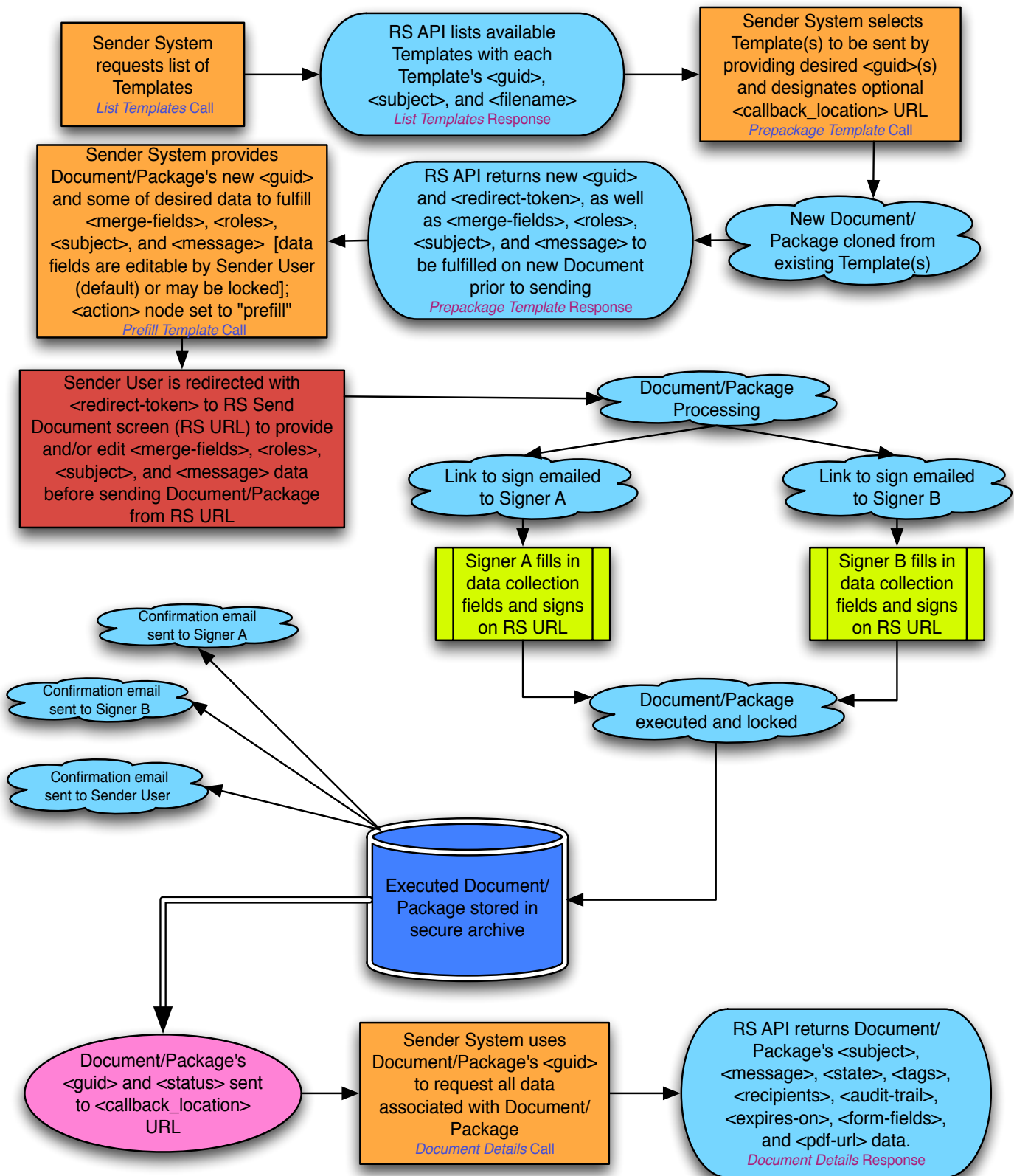


Callback Location URL

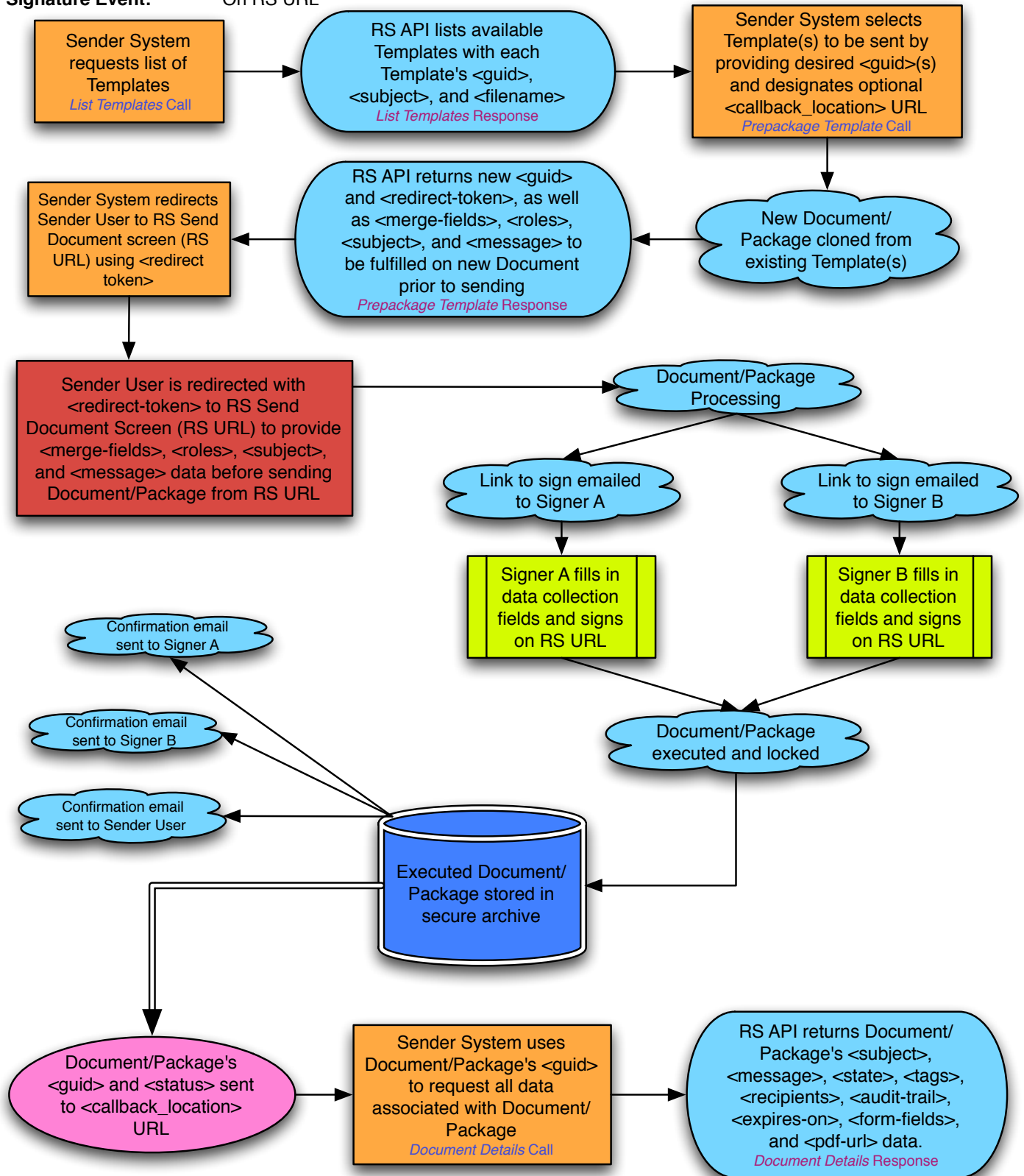
**API Workflow:** 1  
**Send:** Template(s)  
**Merge Field Data, Roles,** Prefilled by Sender System  
**Subject, Message:**  
**Sent By:** Sender System  
**Signature Event:** On RS URL



**API Workflow:** 2  
**Send:** Template(s)  
**Merge Field Data, Roles, Subject, Message:** Partially prefilled by Sender System; Sender User redirected to RS URL to provide and/or edit Instance Information  
**Sent By:** Sender User from RS URL  
**Signature Event:** On RS URL

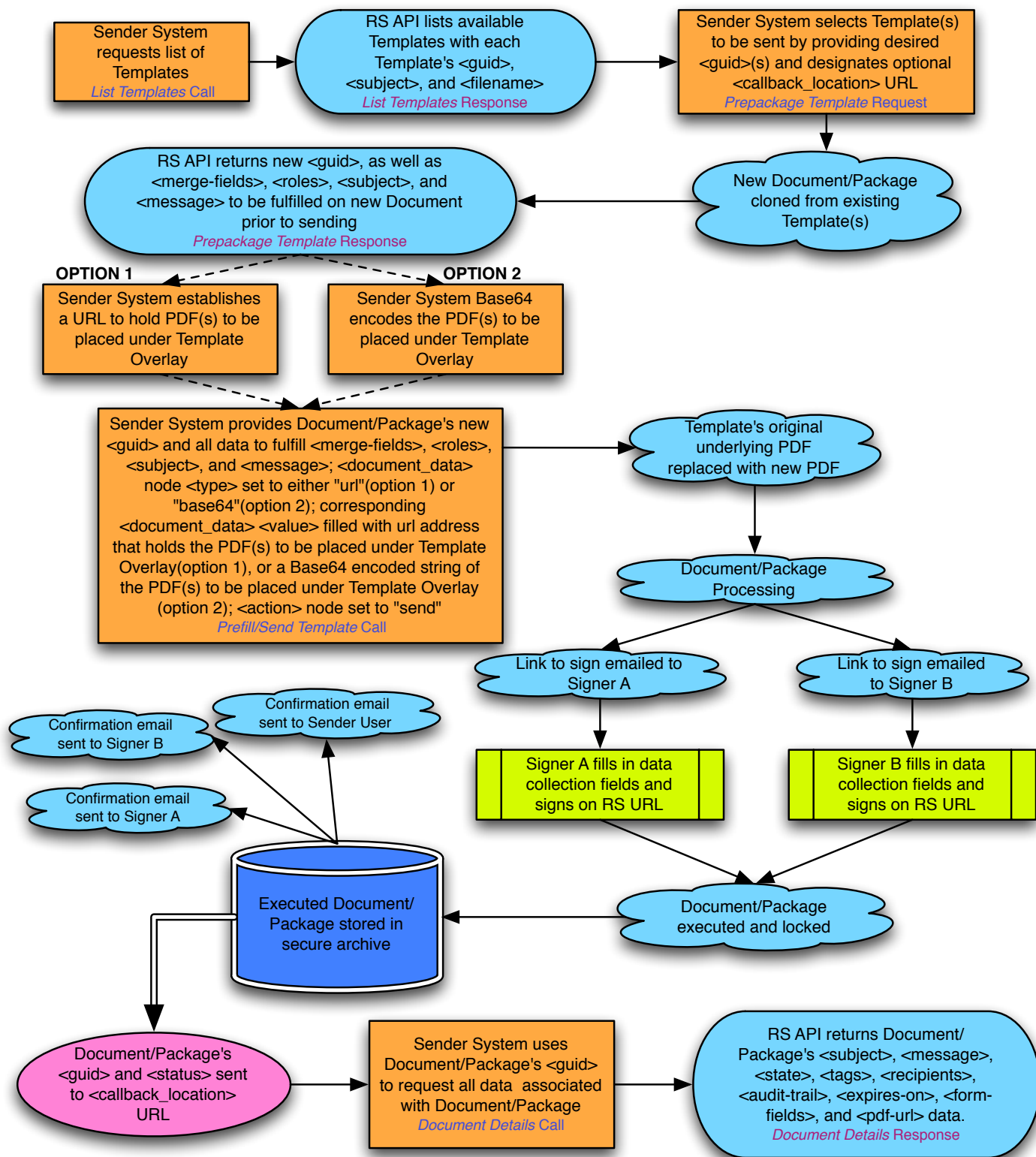


**API Workflow:** 3  
**Send:** Template(s)  
**Merge Field Data, Roles, Subject, Message:** Sender User redirected to RS URL to provide all Instance Information  
**Sent By:** Sender User from RS URL  
**Signature Event:** On RS URL





**API Workflow:** 4  
**Send:** Template and Swap Underlying Document  
**Merge Field Data, Roles, Subject, Message:** Prefilled by Sender System  
**Sent By:** Sender System  
**Signature Event:** On RS URL



**API Workflow:****Send:****Merge Field Data, Roles,  
Subject, Message:****Sent By:****Signature Event:**

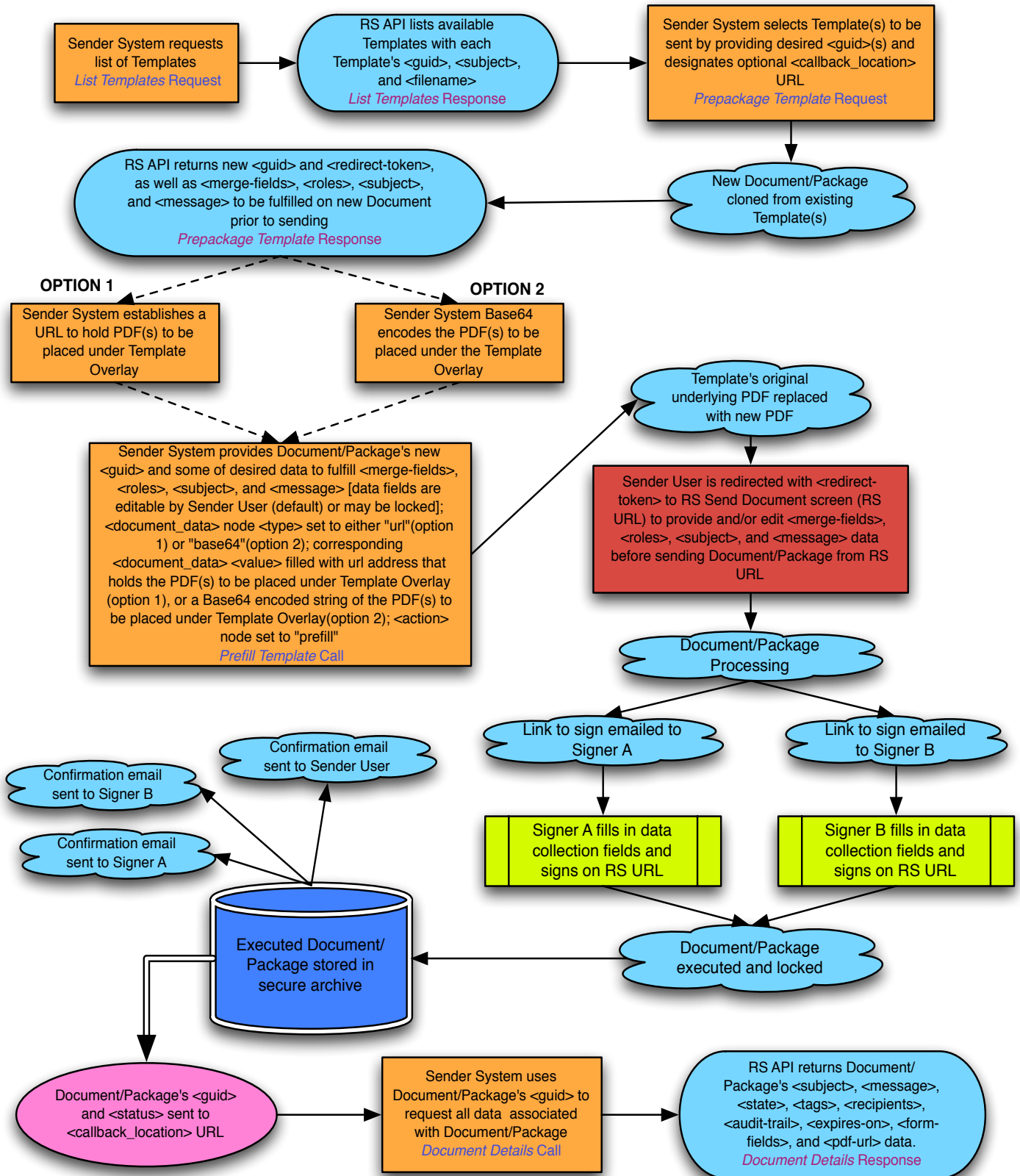
5

Template and Swap Underlying Document

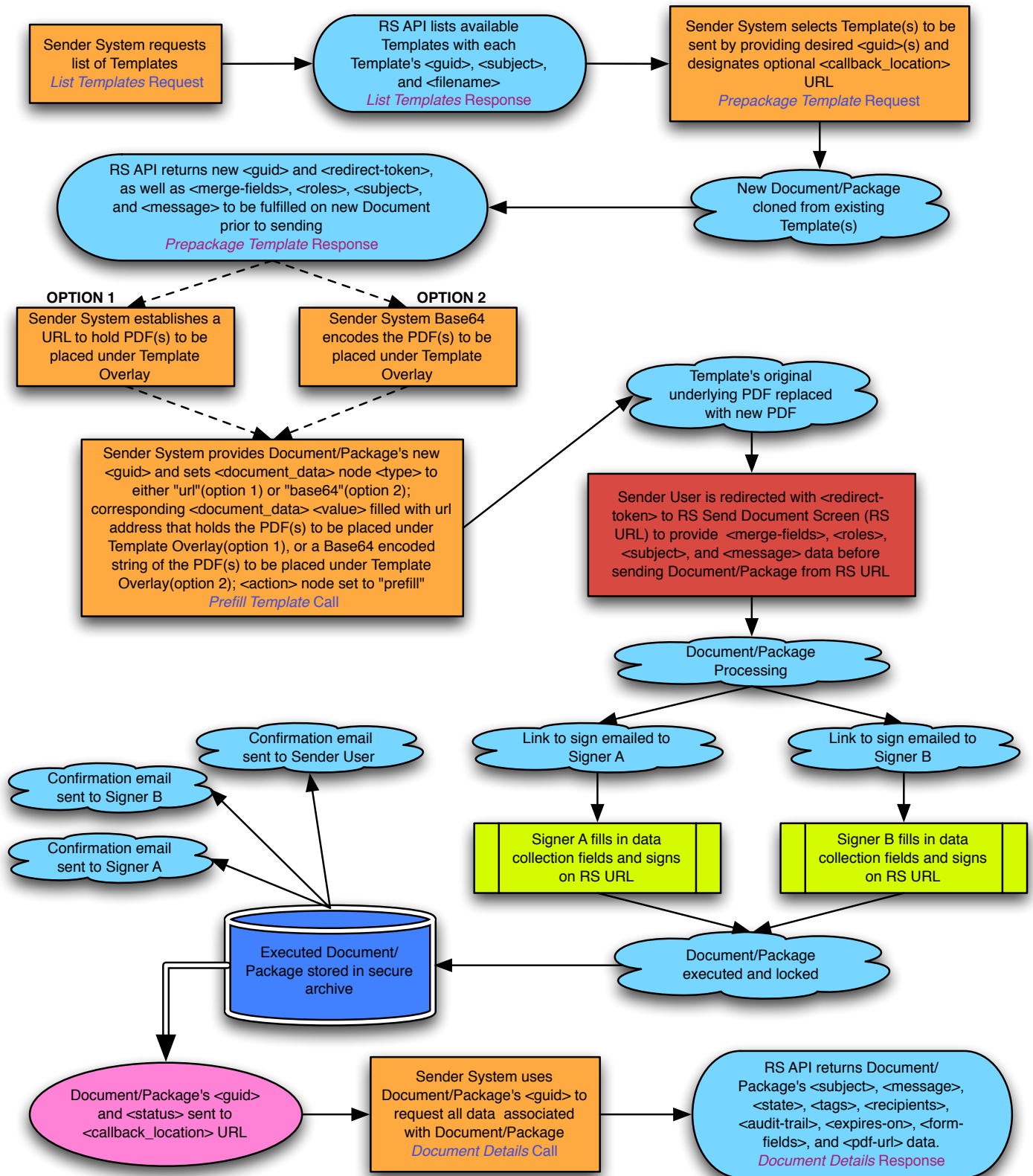
Partially prefilled by Sender System; Sender User redirected  
to RS URL to provide/and or edit Instance Information

Sender User from RS URL

On RS URL



**API Workflow:** 6  
**Send:** Template and Swap Underlying Document  
**Merge Field Data, Roles, Subject, Message:** Sender User redirected to RS URL to provide all Instance Information  
**Sent By:** Sender User from RS URL  
**Signature Event:** On RS URL



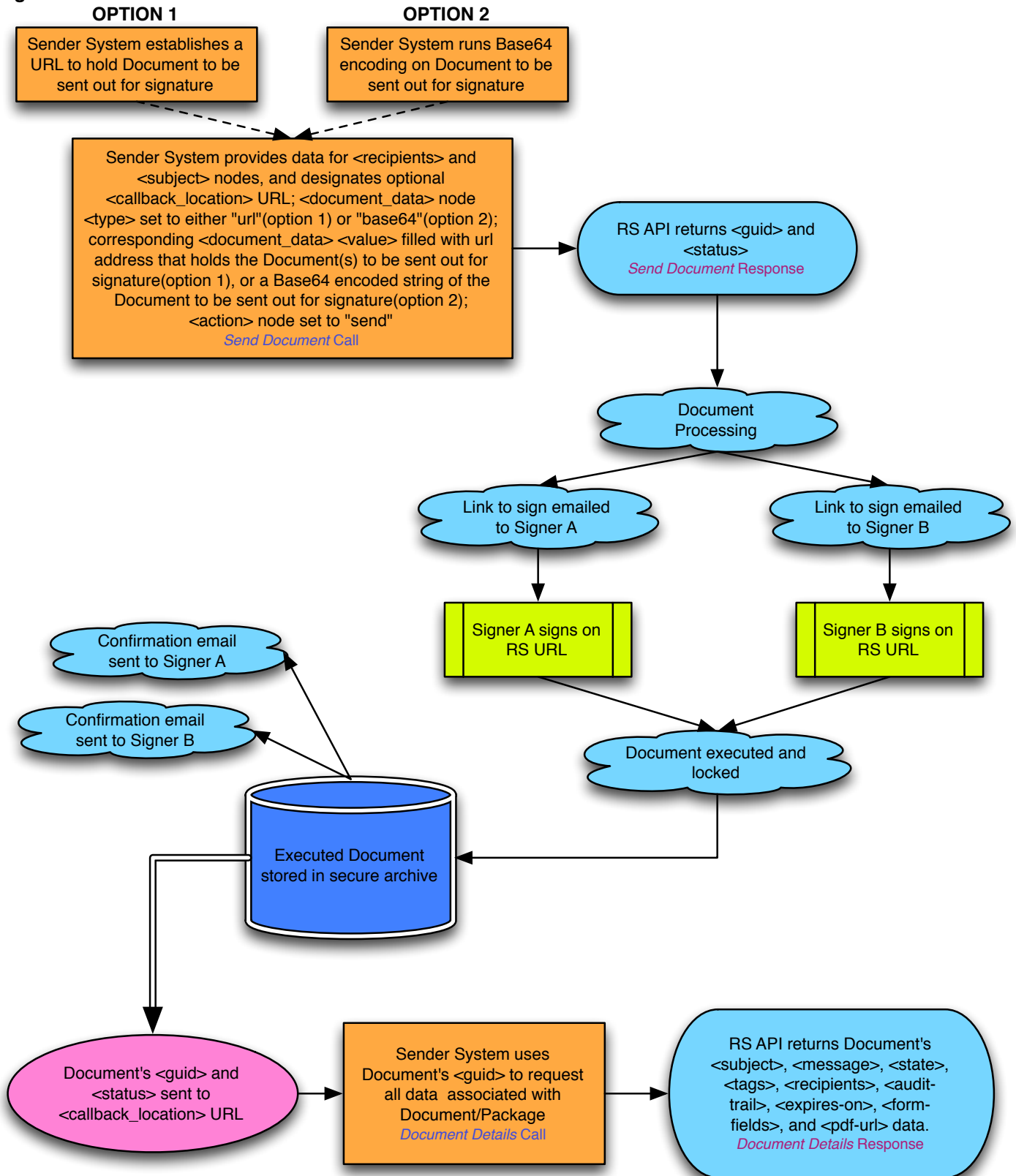
**API Workflow:** 7

**Send:** One-Off Document

**Merge Field Data, Roles, Subject, Message:** Roles, Subject, Message prefilled by Sender System;  
no text fields or signature boxes on Document

**Sent By:** Sender System

**Signature Event:** On RS URL



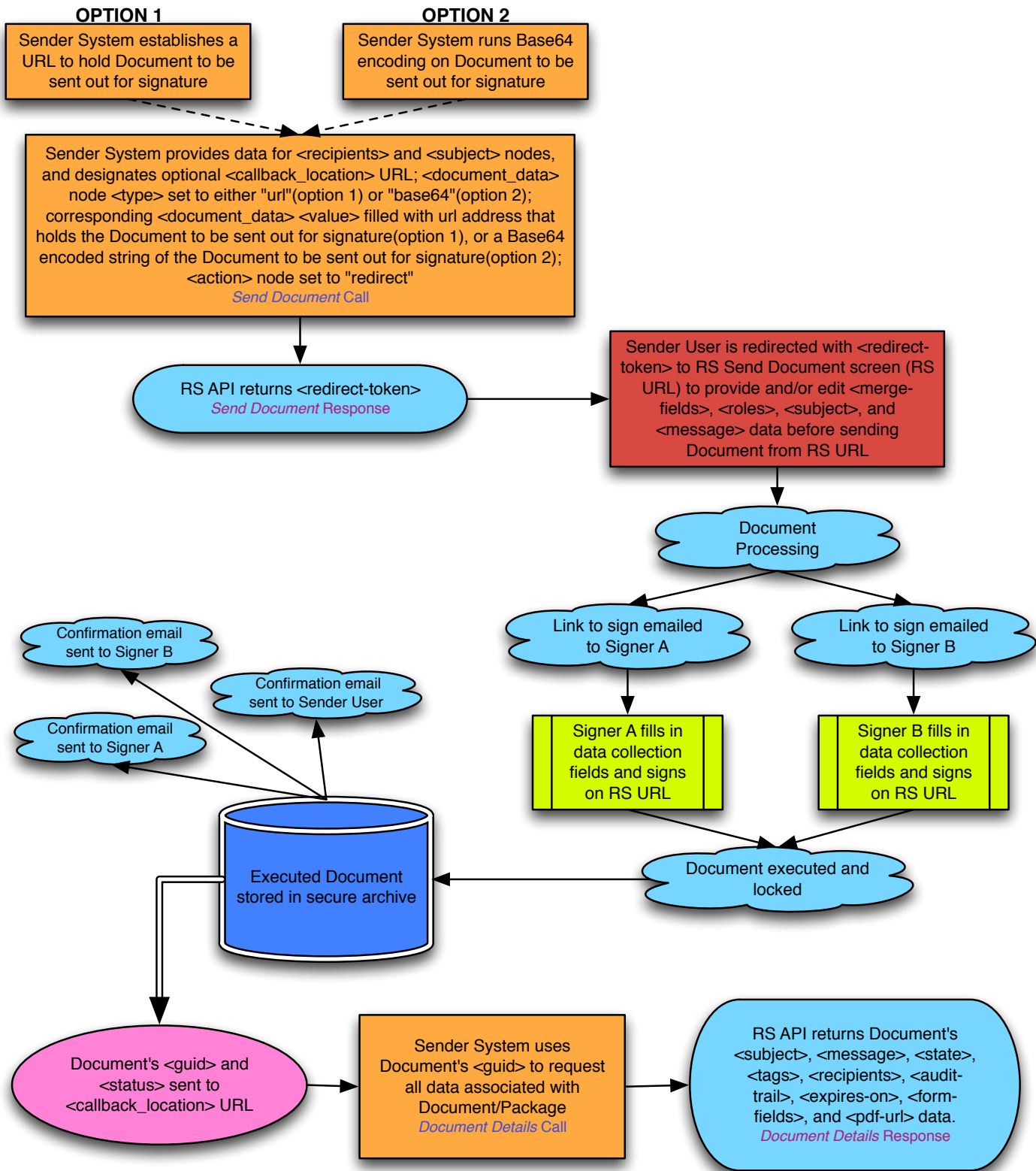
**API Workflow:** 8

**Send:** One-Off Document

**Merge Field Data, Roles, Subject, Message:** Roles, Subject, Message prefilled by Sender System;  
Sender User redirected to RS URL to edit Instance Information and/or place text fields and signature boxes

**Sent By:** Sender User from RS URL

**Signature Event:** On RS URL



**API Workflow:** 9

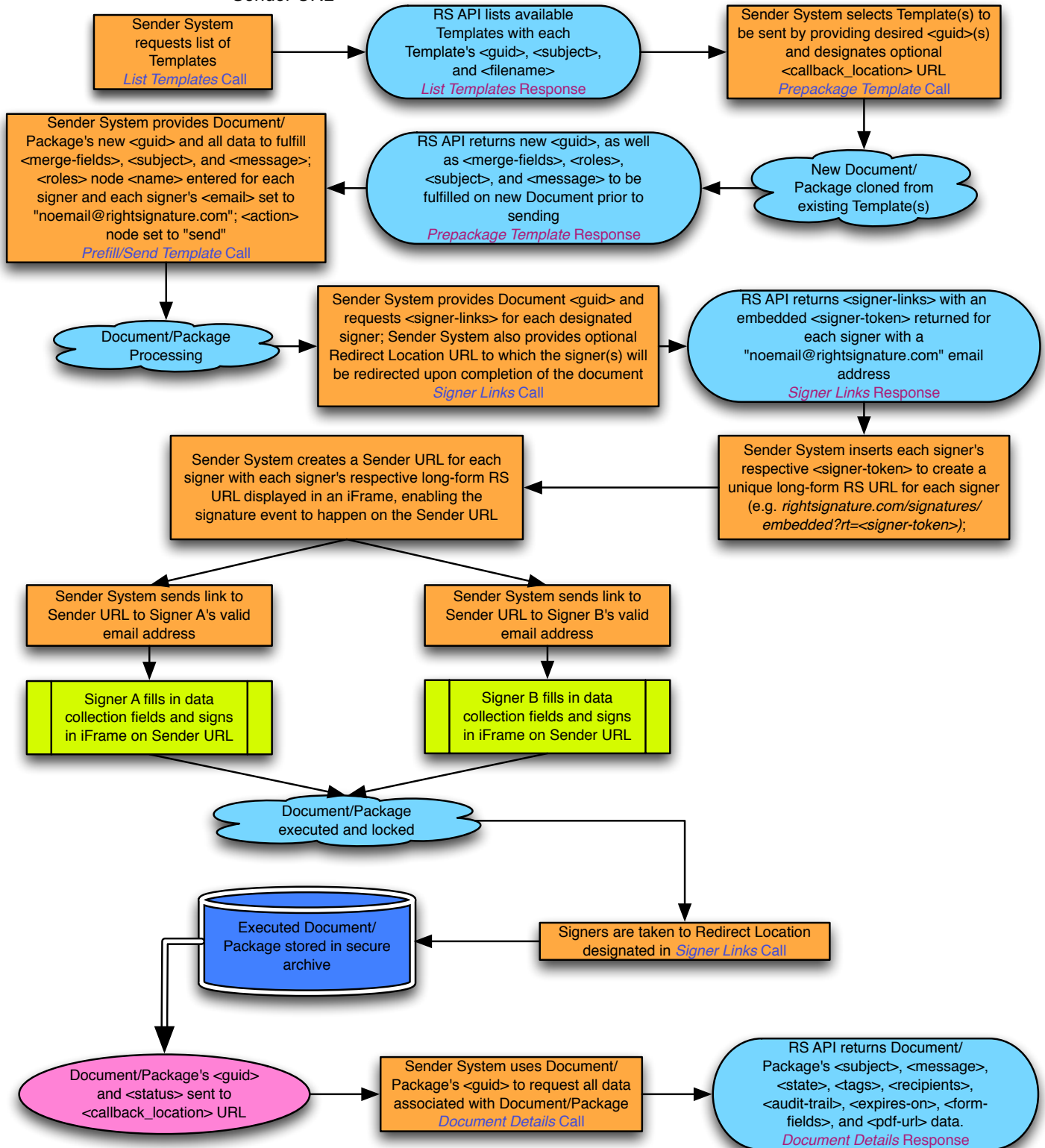
**Send:** Template(s)

**Merge Field Data, Roles,** Prefilled by Sender System

**Subject, Message:**

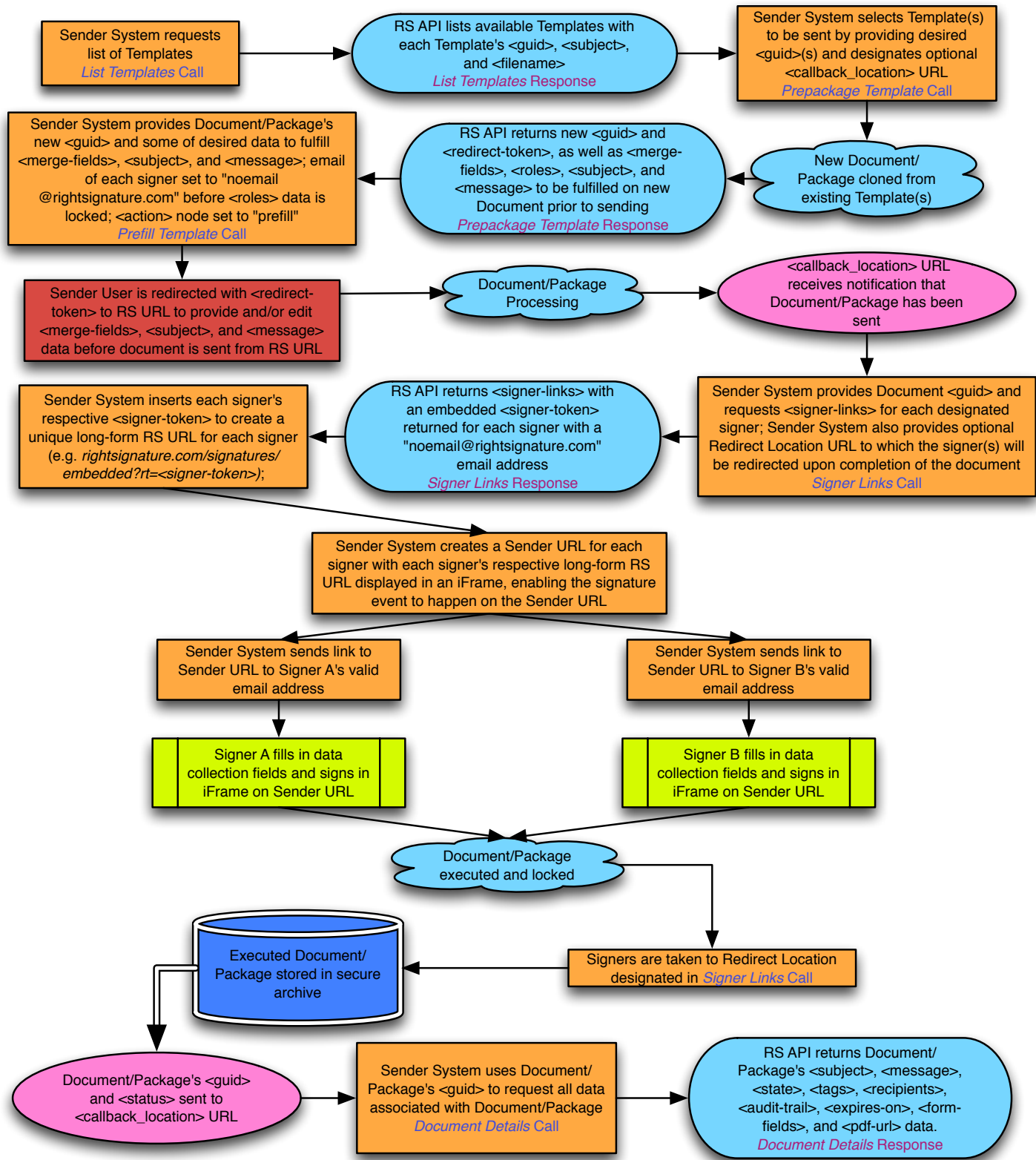
**Sent By:** Sender System

**Signature Event:** Embedded: Signer receives link, signs on Sender URL

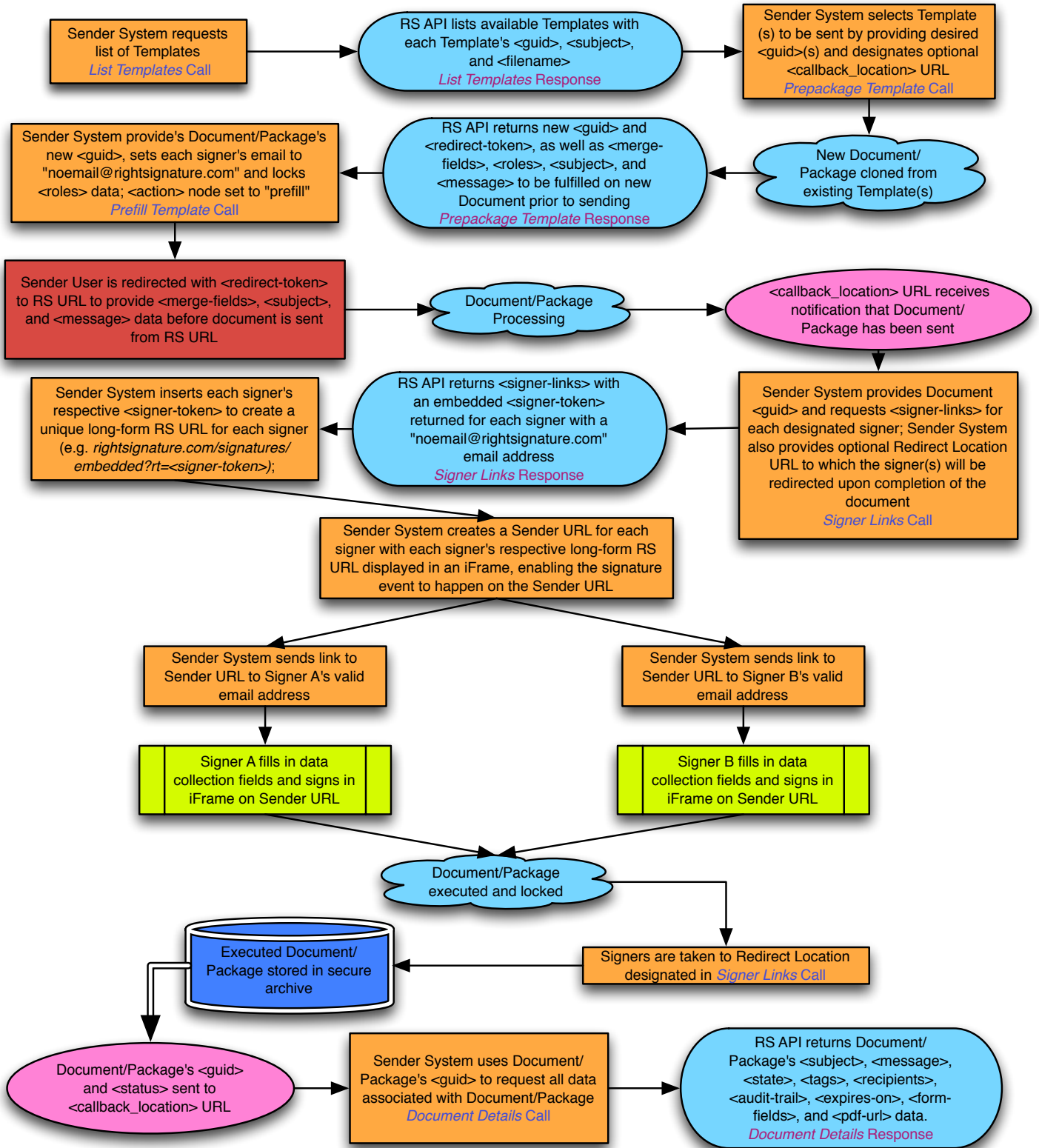




**API Workflow:** 10  
**Send:** Template(s)  
**Merge Field Data, Roles, Subject, Message:** Partially prefilled by Sender System; Sender User redirected to RS URL to provide and/or edit Instance Information  
**Sent By:** Sender User from RS URL  
**Signature Event:** Embedded: Signer receives link, signs on Sender URL

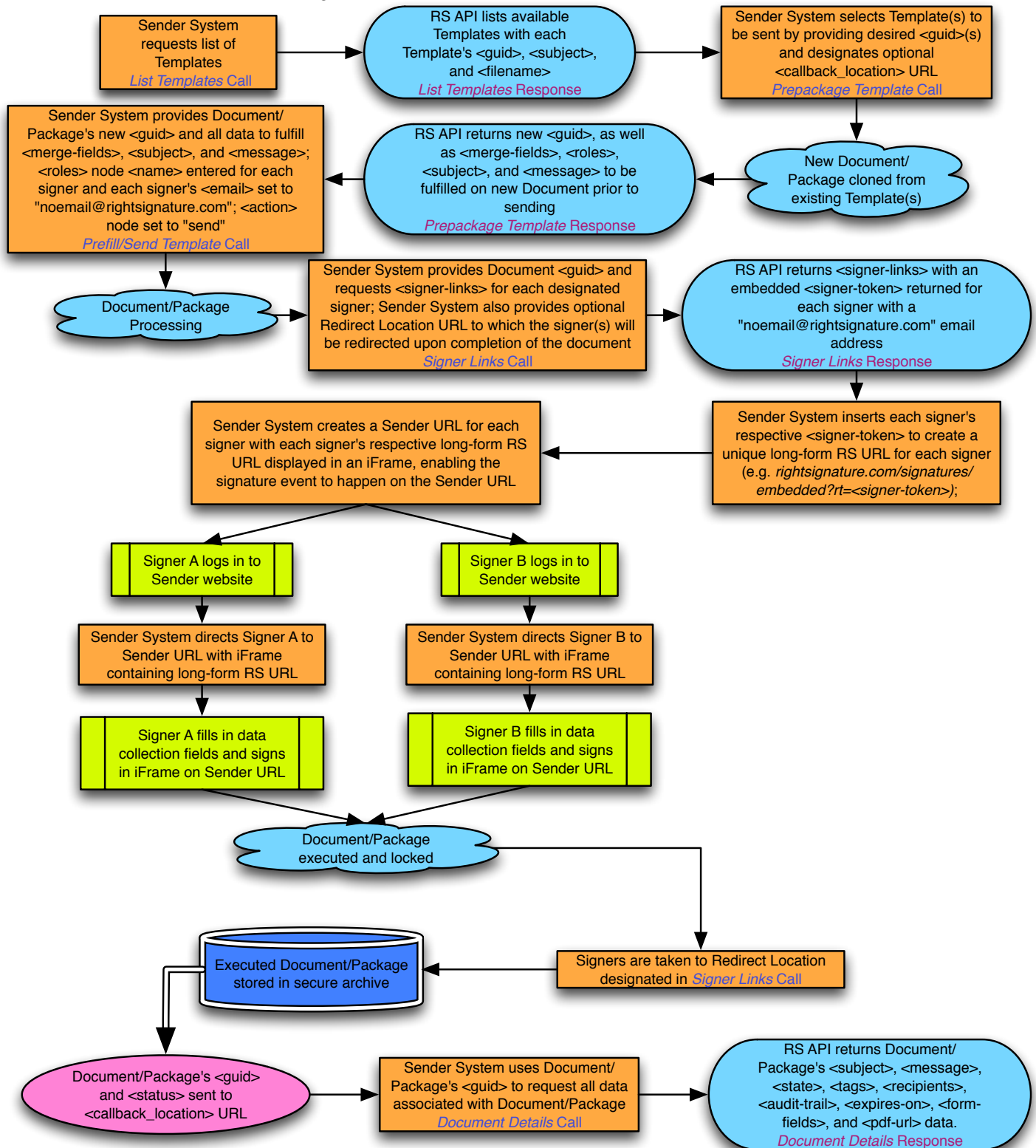


**API Workflow:** 11  
**Send:** Template(s)  
**Merge Field Data, Roles, Subject, Message:** Sender User redirected to RS URL to provide all Instance Information  
**Sent By:** Sender User from RS URL  
**Signature Event:** Embedded: Signer receives link, signs on Sender URL

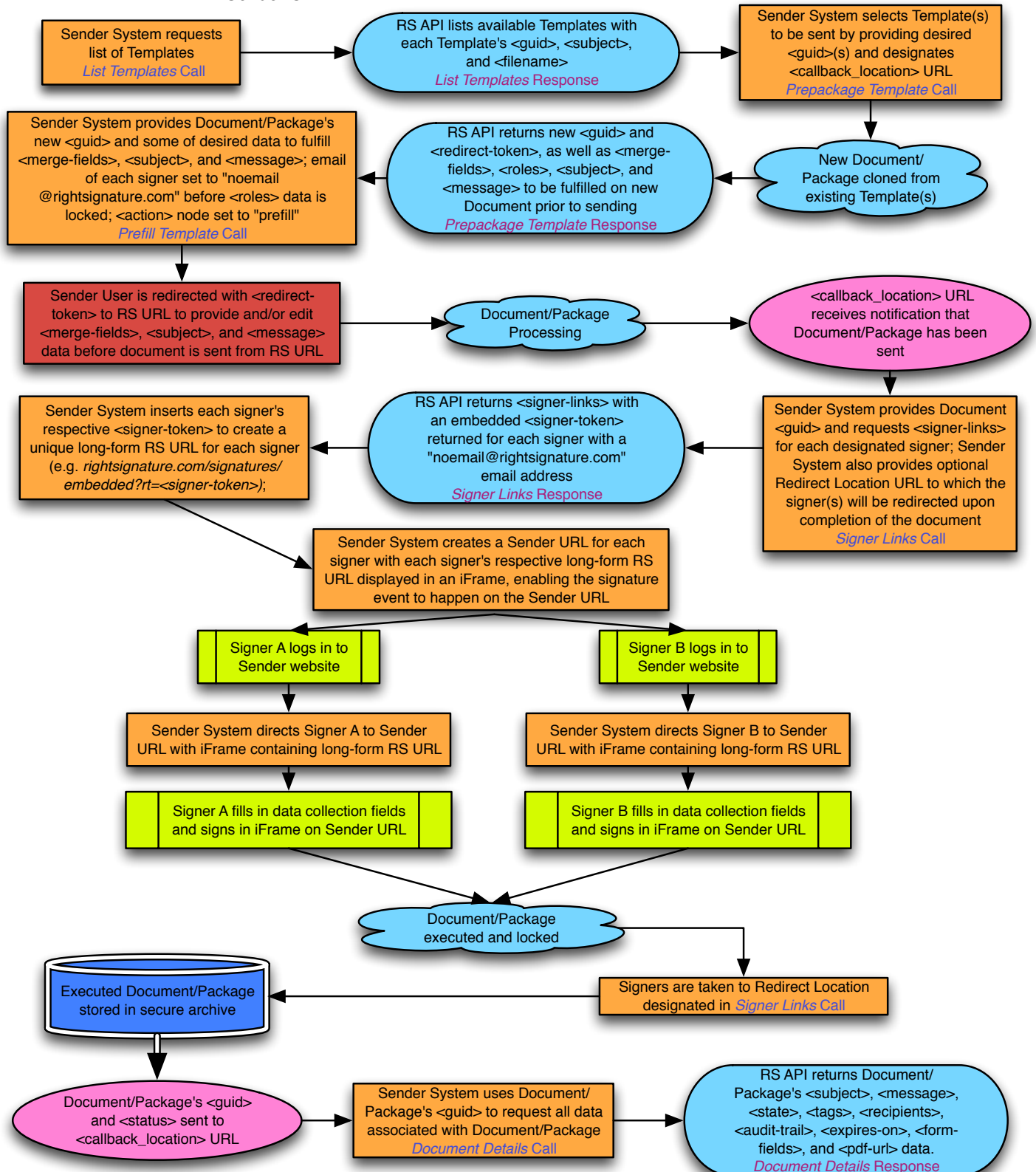




**API Workflow:** 12  
**Send:** Template(s)  
**Merge Field Data, Roles,** Prefilled by Sender System  
**Subject, Message:**  
**Sent By:** Sender System  
**Signature Event:** Embedded: Signer logs in to Sender website, signs on Sender URL



**API Workflow:** 13  
**Send:** Template(s)  
**Merge Field Data, Roles, Subject, Message:** Partially prefilled by Sender System; Sender User redirected to RS URL to provide and/or edit Instance Information  
**Sent By:** Sender User from RS URL  
**Signature Event:** Embedded: Signer logs in to Sender website, signs on Sender URL



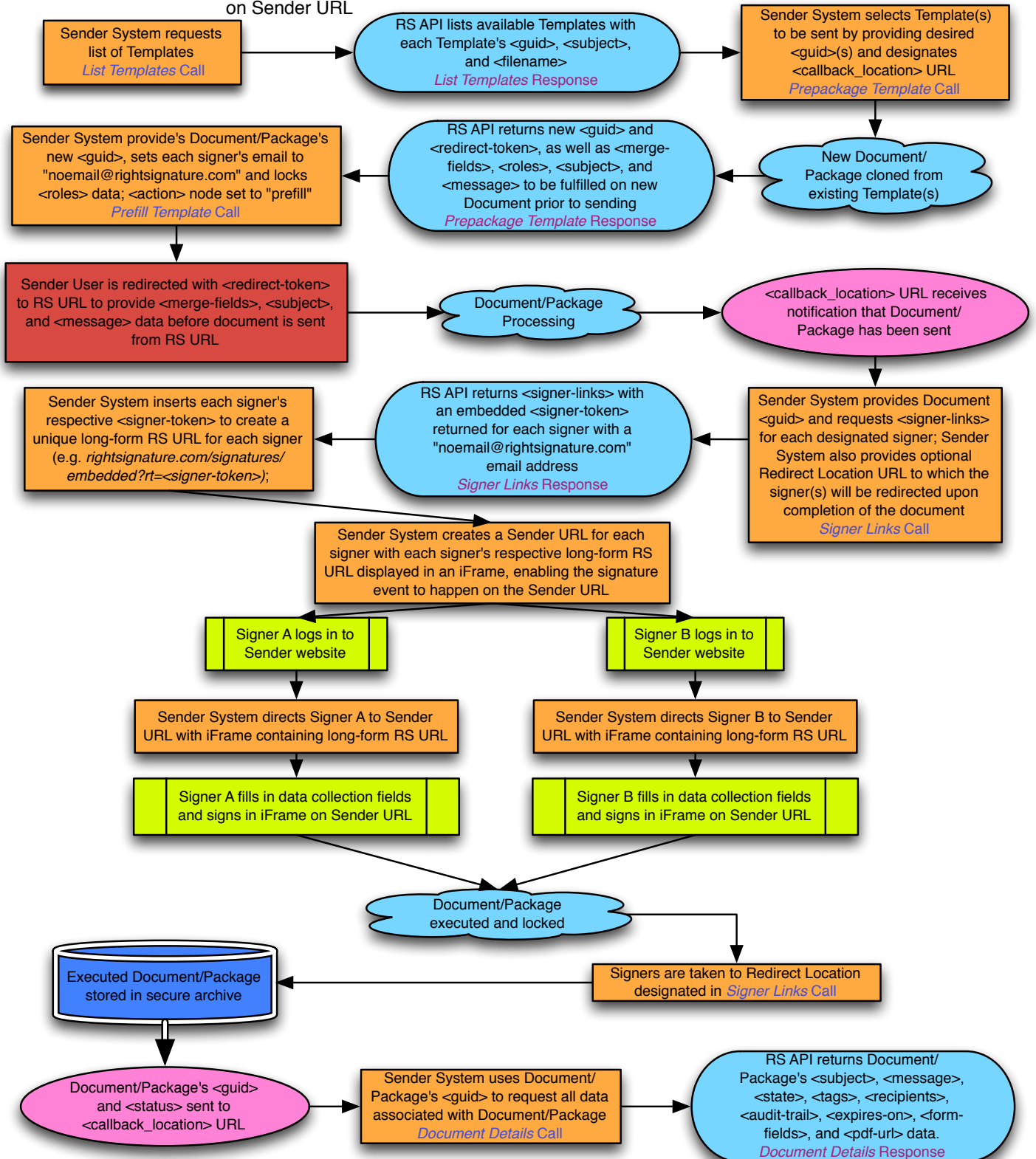
**API Workflow:** 14

**Send:** Template(s)

**Merge Field Data, Roles, Subject, Message:** Sender User redirected to RS URL to provide all Instance Information

**Sent By:** Sender User from RS URL

**Signature Event:** Embedded: Signer logs in to Sender website, signs on Sender URL



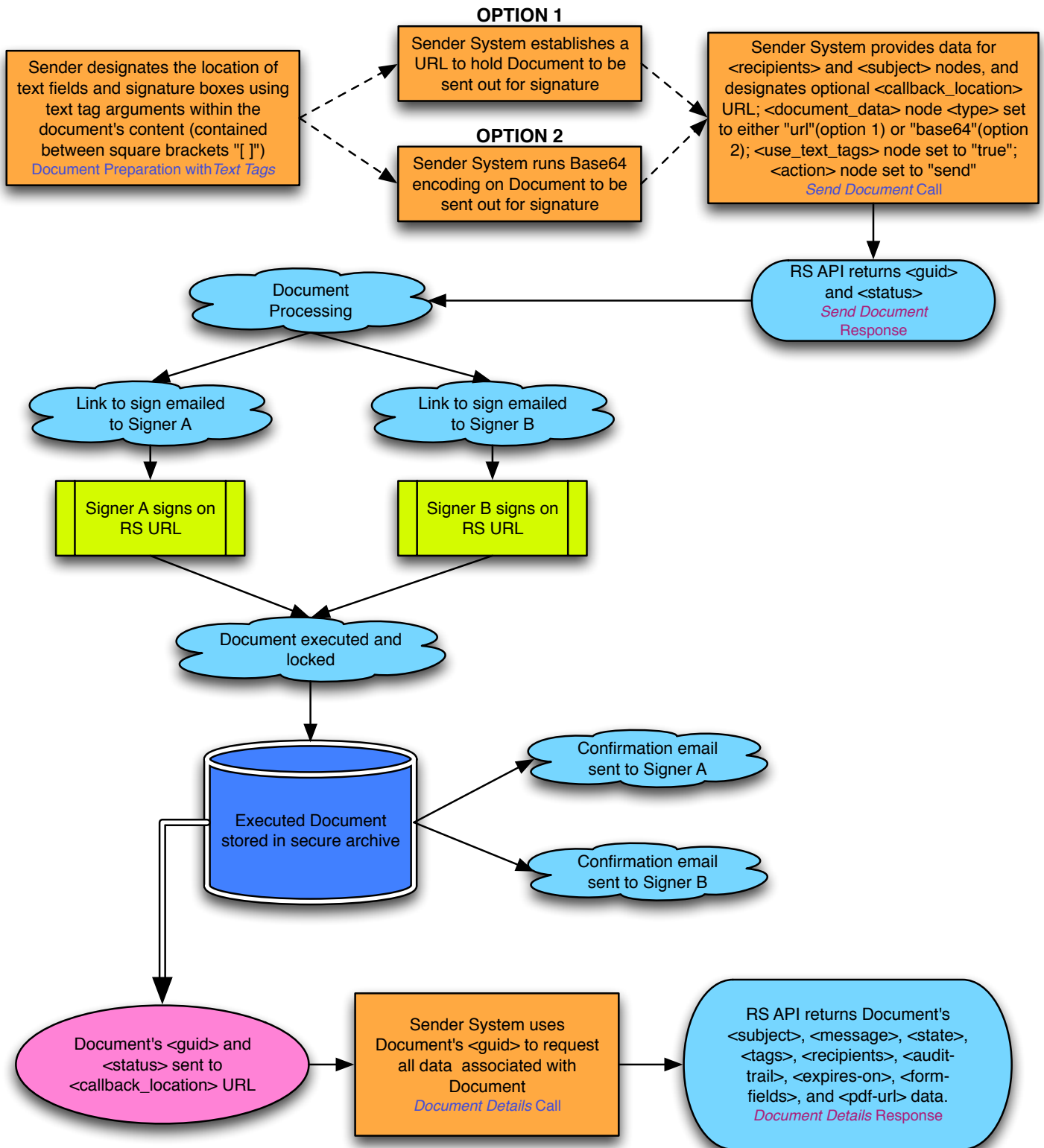
**API Workflow:** 15

**Send:** One-Off Document

**Merge Field Data, Roles, Subject, Message:** Roles, Subject, Message prefilled by Sender System;  
text fields and signature boxes set with Text Tags

**Sent By:** Sender System

**Signature Event:** On RS URL



## API Workflow:

### Send:

### Merge Field Data, Roles, Subject, Message:

### Sent By:

### Signature Event:

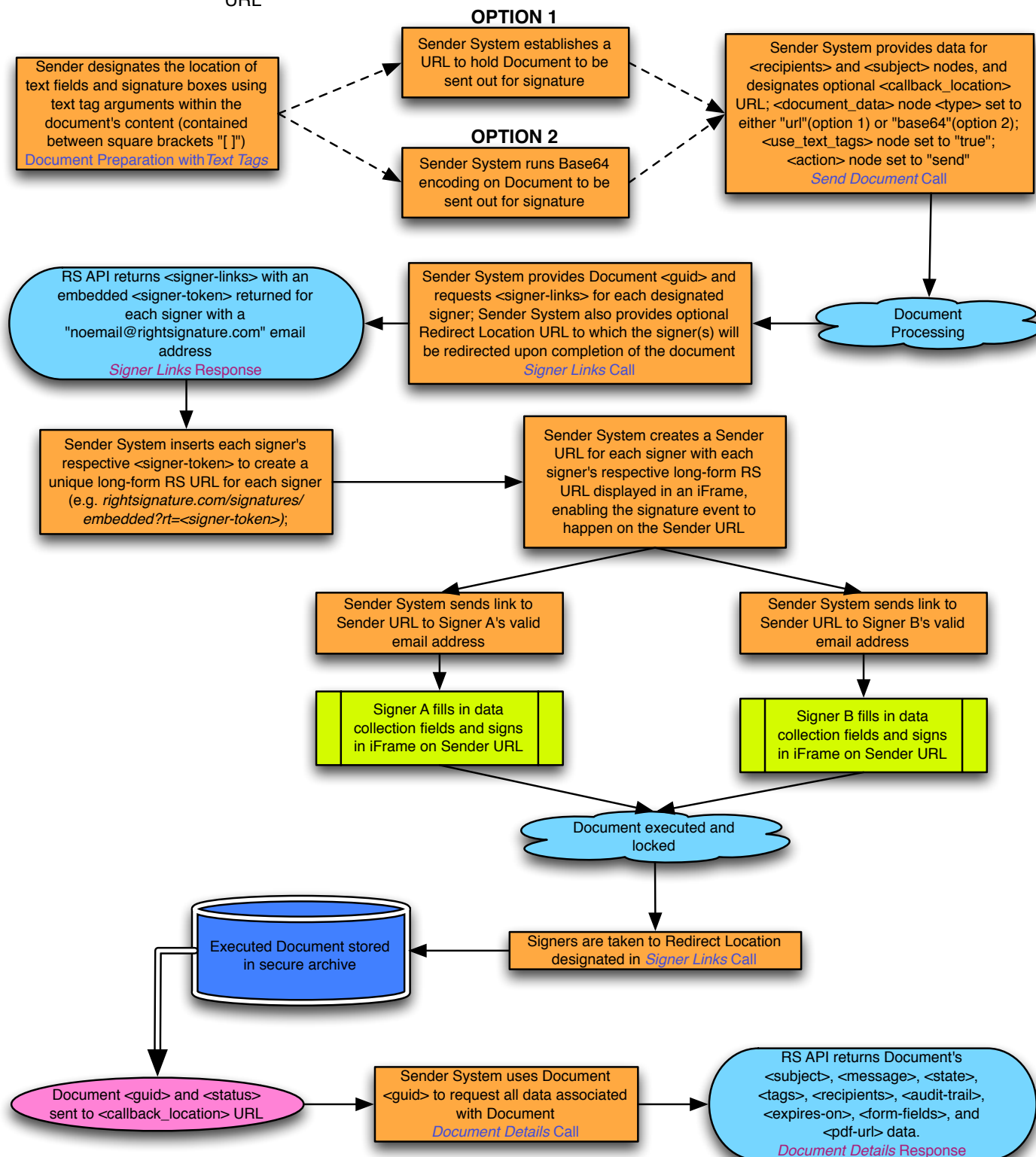
16

One-Off Document(s)

Roles, Subject, Message prefilled by Sender System;  
text fields and signature boxes set with Text Tags

Sender System

Embedded: Signer receives link, signs on Sender URL



## API Workflow:

### Send:

### Merge Field Data, Roles, Subject, Message:

### Sent By:

### Signature Event:

17

One-Off Document(s)

Roles, Subject, Message prefilled by Sender System;  
text fields and signature boxes set with Text Tags

Sender System

Embedded: Signer logs in to Sender website, signs  
on Sender URL

