

Easy Online Document Signing

RightSignature API Workflows

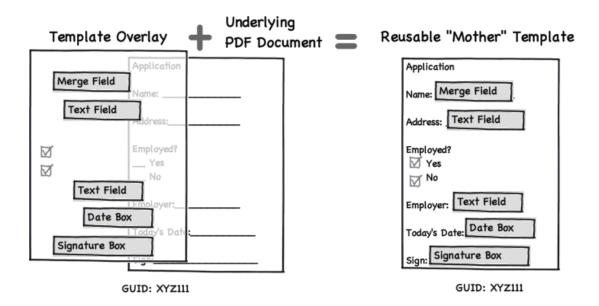
Online Documentation: https://rightsignature.com/apidocs/overview

API Support: support@rightsignature.com 1-800-921-4250

RightSignature Basic Concepts

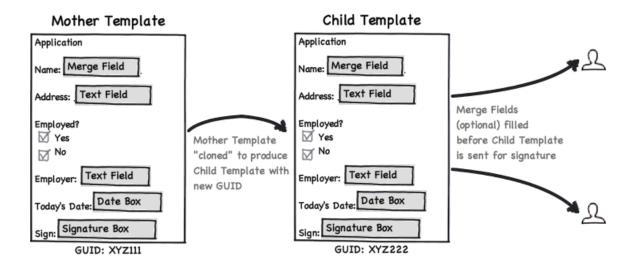
What is a Reusable Template?

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.

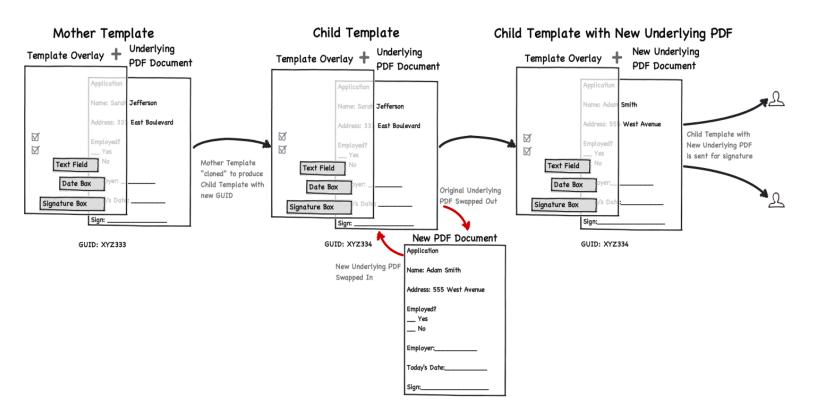


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What does it mean to swap the Underlying PDF before sending a Template?

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.

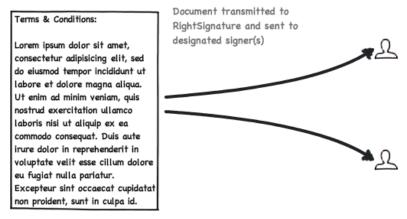
API Workflows 4, 5, and 6 include the PDF swap feature.



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.

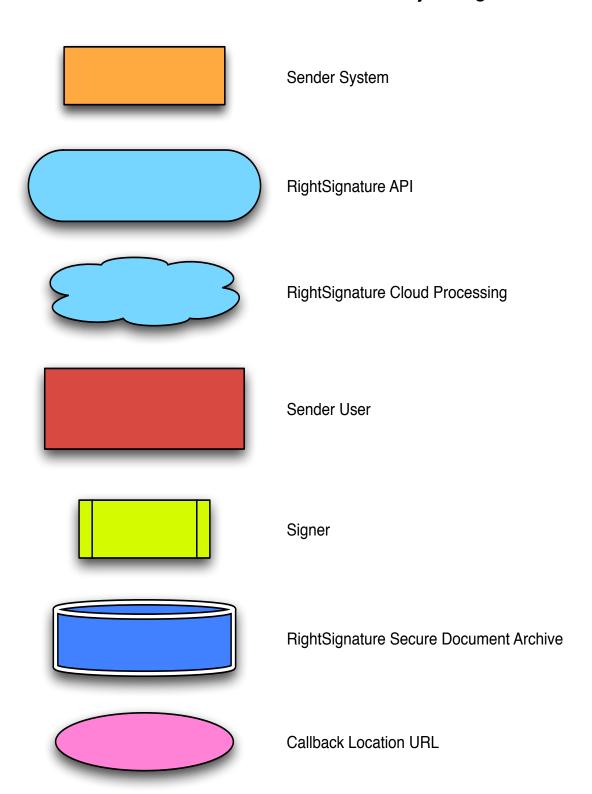
In API Workflow 7, the document is sent without a Template Overlay, and the signatures appear only on the Signature Certificate (appended to all RightSignature executed documents in all workflows), not inside the document itself. In API Workflow 8, the Sender User manually creates the Overlay by placing 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



Template(s) Send: Merge Field Data, Roles, Prefilled by Sender System Subject, Message: Sent By: Sender System Signature Event: On RS URL Sender System selects RS API lists available Sender System Template(s) to be sent by Templates with each requests list of providing desired <guid>(s) Template's <guid>, Templates and designates optional <subject>, and <filename> List Templates Call <callback location> URL List Templates Response Prepackage Template Call Sender System provides RS API returns new <guid>, as Document/Package's new <guid> well as <merge-fields>, New Document/ and all data to fulfill <merge-<roles>, <subject>, and Package cloned from fields>, <roles>, <subject>, <message> to be fulfilled on existing Template(s) <message>; <action> node set to new Document prior to sending "send" Prepackage Template Response Prefill/Send Template Call Document/Package Processing Link to sign emailed Link to sign emailed to Signer B to Signer A Signer A fills in Signer B fills in data collection data collection fields and signs fields and signs on RS URL on RS URL Document/Package executed and locked Confirmation email sent to Signer A **Executed Document/** Package stored in secure archive Confirmation email sent to Signer B RS API returns Document/ Sender System uses Package's <subject>, Document/Package's Document/Package's <quid> <message>, <state>, <tags>, <guid> and <status> sent to request all data <recipients>, <audit-trail>, to <callback location> associated with Document/ <expires-on>, <form-fields>, **URL** Package and <pdf-url> data. Document Details Call Document Details Response

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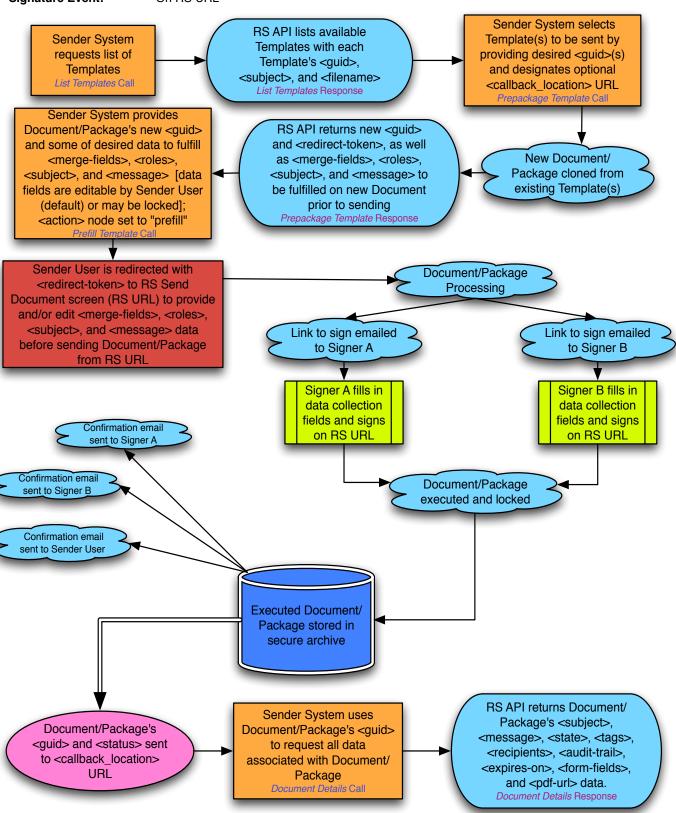
API Workflow:

Send: Template(s)

Merge Field Data, Roles, Partially prefilled by Sender System; Sender User redirected **Subject, Message:** to RS URL to provide and/or edit Instance Information

Sent Bv: Sender User from RS URL

Signature Event: On RS URL



API Workflow: Send: Template(s) Merge Field Data, Roles, Sender User redirected to RS URL Subject, Message: to provide all Instance Information Sent By: Sender User from RS URL Signature Event: On RS URL Sender System selects RS API lists available Sender System Template(s) to be sent by Templates with each requests list of providing desired <guid>(s) Template's <guid>, **Templates** and designates optional <subject>, and <filename> List Templates Call <callback location> URL List Templates Response Prepackage Template Call RS API returns new <quid> and <redirect-token>, as well Sender System redirects Sender User to RS Send New Document/ as <merge-fields>, <roles>, Document screen (RS Package cloned from <subject>, and <message> to URL) using <redirect be fulfilled on new Document existing Template(s) token> prior to sending Prepackage Template Response Document/Package Sender User is redirected with Processing <redirect-token> to RS Send Document Screen (RS URL) to provide <merge-fields>, <roles>, <subject>, and <message> data before sending Link to sign emailed Link to sign emailed Document/Package from RS URL to Signer A to Signer B Signer A fills in Signer B fills in data collection data collection fields and signs fields and signs Confirmation email on RS URL on RS URL sent to Signer A Confirmation email Document/Package sent to Signer B executed and locked Confirmation email sent to Sender User **Executed Document/** Package stored in secure archive RS API returns Document/ Sender System uses Package's <subject>, Document/Package's Document/Package's <quid> <message>, <state>, <tags>, <guid> and <status> sent to request all data <recipients>, <audit-trail>, to <callback location> associated with Document/

Package

Document Details Call

URL

<expires-on>, <form-fields>,

and <pdf-url> data.

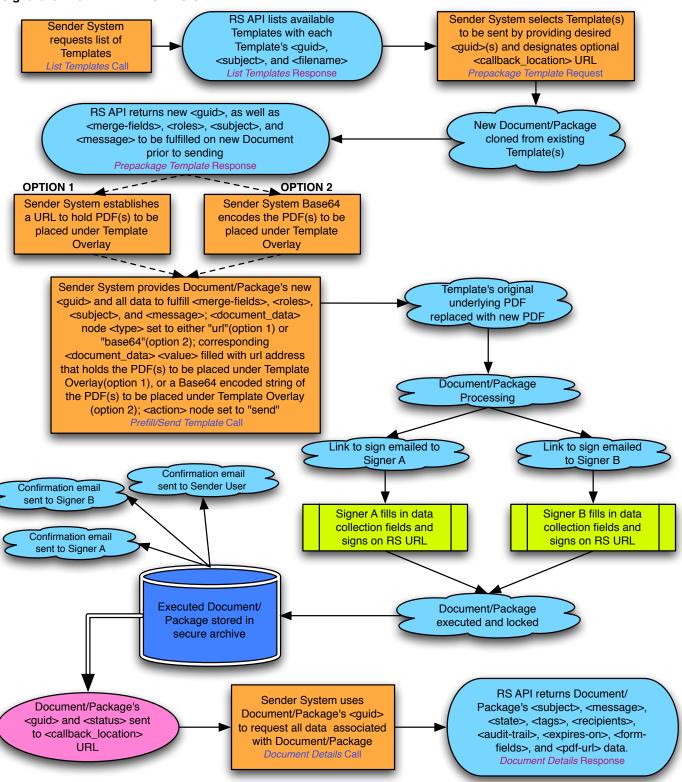
Document Details Response

Send: Template and Swap Underlying Document

Merge Field Data, Roles, Prefilled by Sender System

Subject, Message:

Sent By: Sender System
Signature Event: On RS URL

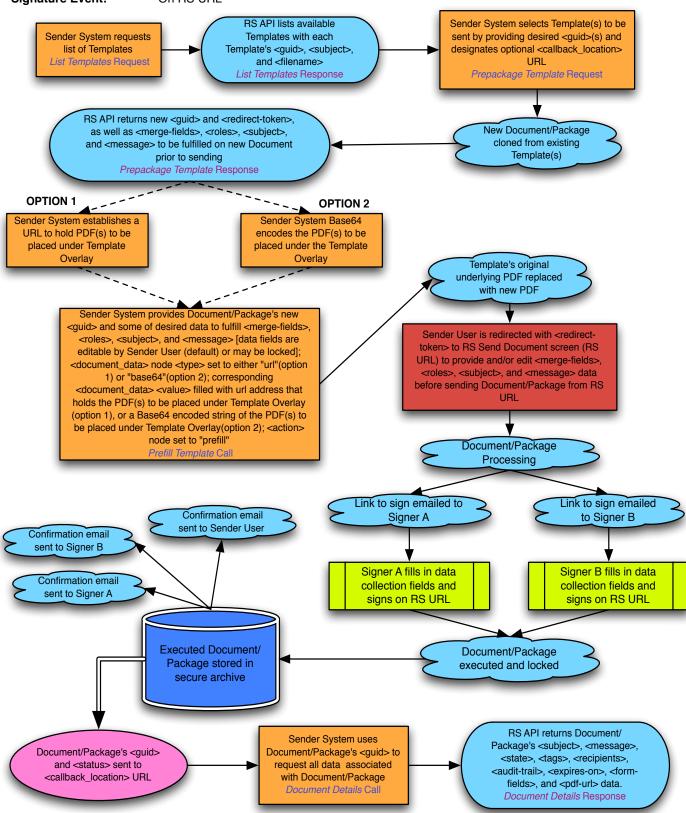


Send: Template and Swap Underlying Document

Merge Field Data, Roles, Partially prefilled by Sender System; Sender User redirected **Subject, Message:** to RS URL to provide/and or edit Instance Information

Sent By: Sender User from RS URL

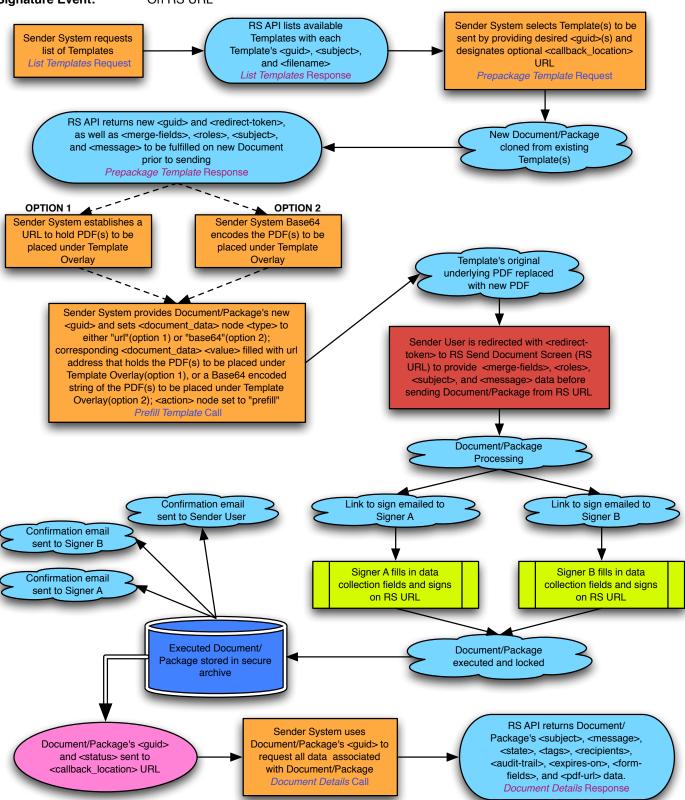
Signature Event: On RS URL



Send: Template and Swap Underlying Document Merge Field Data, Roles, Sender User redirected to RS URL to provide

Subject, Message: all Instance Information
Sent By: Sender User from RS URL

Signature Event: On RS URL

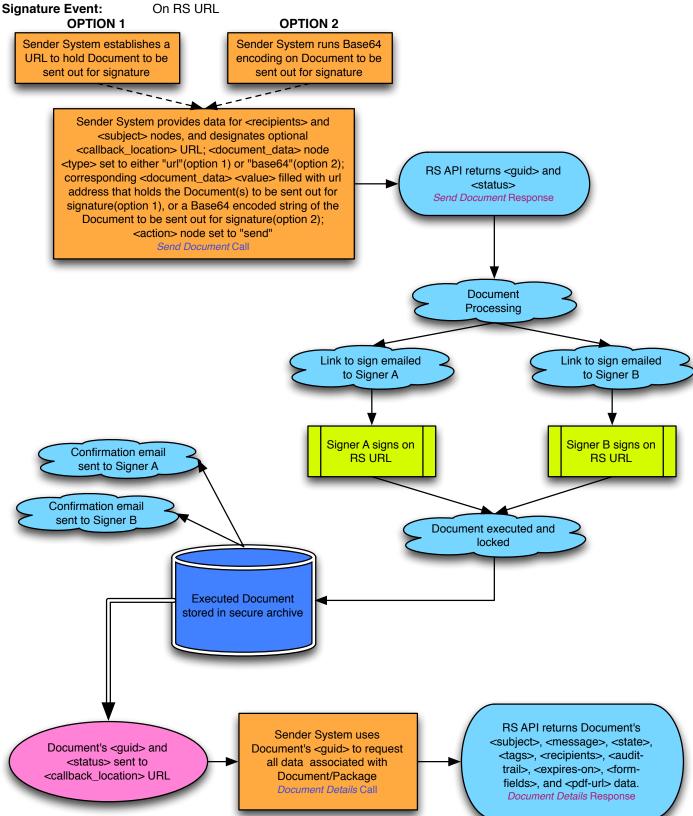


Send: One-Off Document

Merge Field Data, Roles, Roles, Subject, Message prefilled by Sender System;

Subject, Message: no text fields or signature boxes on Document

Sent By: Sender System
Signature Event: On RS LIRI



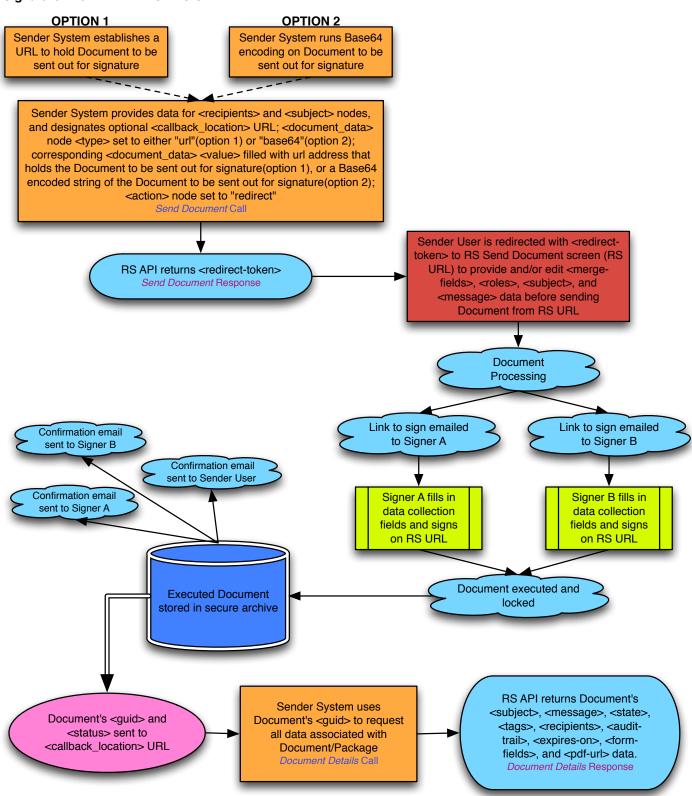
Send: One-Off Document

Merge Field Data, Roles, Roles, Subject, Message prefilled by Sender System;
Subject, Message: 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



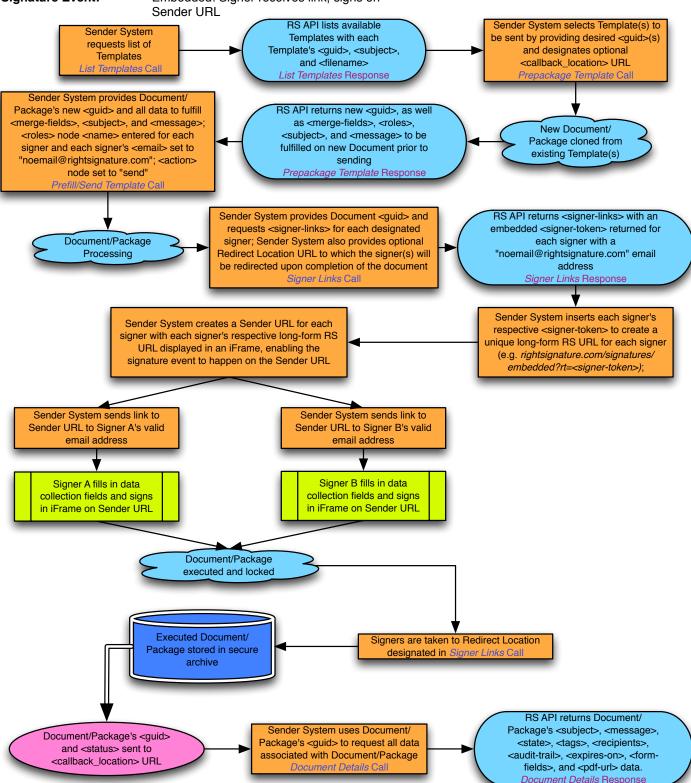
Send: Template(s)

Merge Field Data, Roles, Prefilled by Sender System

Subject, Message:

Sent By: Sender System

Signature Event: Embedded: Signer receives link, signs on



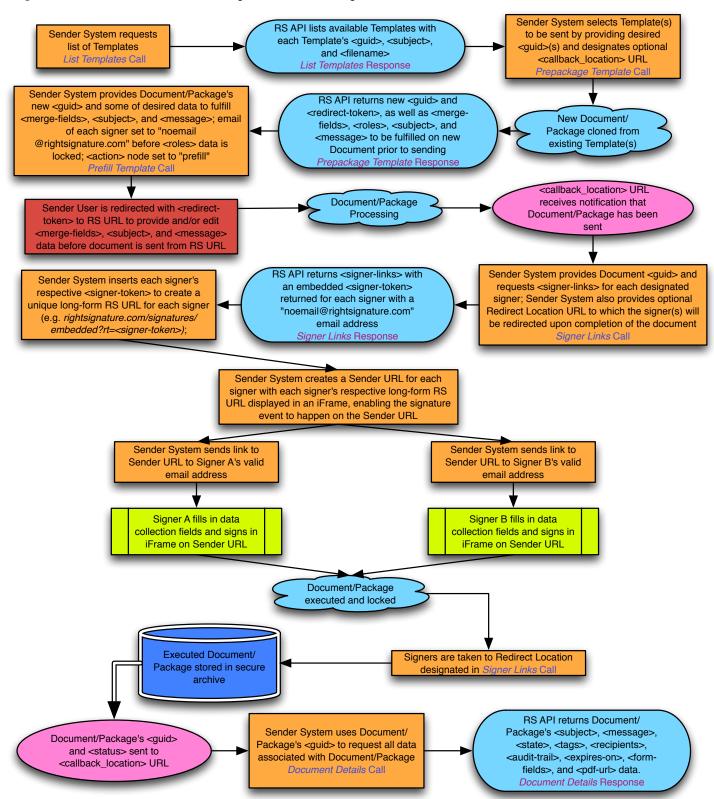
Send: Template(s)

Merge Field Data, Roles, Partially prefilled by Sender System; Sender User redirected

Subject, Message: 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

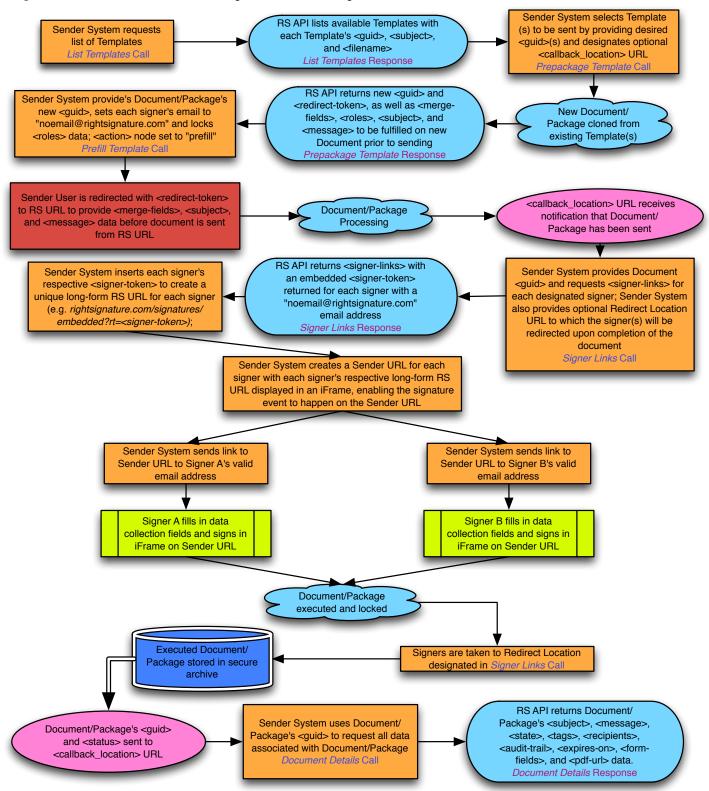


Send: Template(s)

Merge Field Data, Roles, Sender User redirected to RS URL to provide all

Subject, Message: Instance Information
Sent By: Sender User from RS URL

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



Send: Template(s)

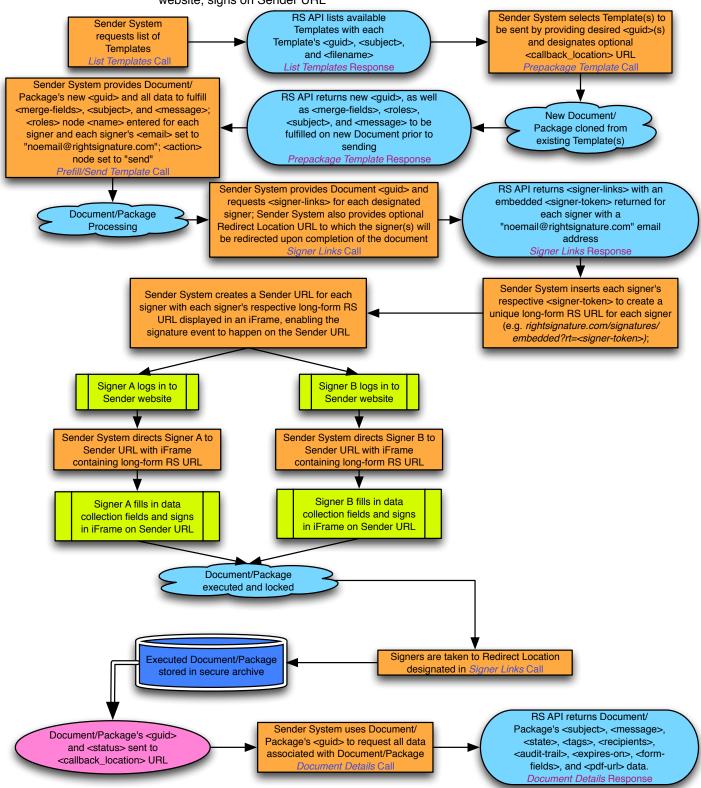
Merge Field Data, Roles, Prefilled by Sender System

Subject, Message:

Sent By: Sender System

Signature Event: Embedded: Signer logs in to Sender

website, signs on Sender URL



Send: Template(s)

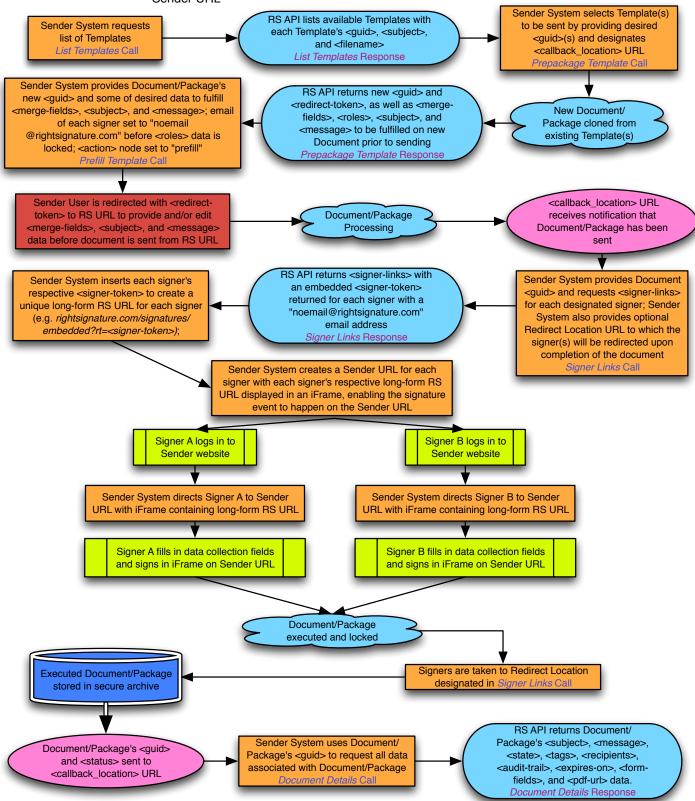
Merge Field Data, Roles, Partially prefilled by Sender System; Sender User redirected

Subject, Message: 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) Subject, Message: Sent By: **Signature Event:** on Sender URL Sender System requests list of Templates List Templates Call

Merge Field Data, Roles, Sender User redirected to RS URL to provide all

Instance Information Sender User from RS URL

Embedded: Signer logs in to Sender website, signs

List Templates Response RS API returns new <guid> and <redirect-token>, as well as <mergefields>, <roles>, <subject>, and <message> to be fulfilled on new Document prior to sending

Prepackage Template Response

Document/Package

Processing

RS API lists available Templates with

each Template's <guid>, <subject>,

and <filename>

Sender User is redirected with <redirect-token> to RS URL to provide <merge-fields>, <subject>, and <message> data before document is sent from RS URL

Sender System provide's Document/Package's

new <guid>, sets each signer's email to

"noemail@rightsignature.com" and locks

<roles> data; <action> node set to "prefill"

Prefill Template Call

Sender System inserts each signer's respective <signer-token> to create a unique long-form RS URL for each signer (e.g. rightsignature.com/signatures/ embedded?rt=<signer-token>);

RS API returns <signer-links> with an embedded <signer-token> returned for each signer with a "noemail@rightsignature.com" email address

Signer Links Response

Sender System creates a Sender URL for each signer with each signer's respective long-form RS URL displayed in an iFrame, enabling the signature event to happen on the Sender URL

Sender System directs Signer A to Sender URL with iFrame containing long-form RS URL

Signer A logs in to

Sender website

Signer A fills in data collection fields and signs in iFrame on Sender URL Signer B fills in data collection fields and signs in iFrame on Sender URL

Signers are taken to Redirect Location

designated in Signer Links Cal

Signer B logs in to

Sender website

Sender System directs Signer B to Sender

URL with iFrame containing long-form RS URL

Document/Package executed and locked

Sender System uses Document/ Package's <guid> to request all data associated with Document/Package Document Details Call

RS API returns Document/ Package's <subject>, <message>, <state>, <tags>, <recipients>, <audit-trail>, <expires-on>, <formfields>, and <pdf-url> data. Document Details Response

Sender System selects Template(s)

to be sent by providing desired

<guid>(s) and designates

<callback_location> URL

Prepackage Template Cal

New Document/

Package cloned from

existing Template(s)

<callback_location> URL receives

notification that Document/

Package has been sent

Sender System provides Document

<guid> and requests <signer-links>

for each designated signer; Sender

System also provides optional

Redirect Location URL to which the

signer(s) will be redirected upon completion of the document Signer Links Call

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Executed Document/Package

stored in secure archive

Document/Package's <guid>

and <status> sent to

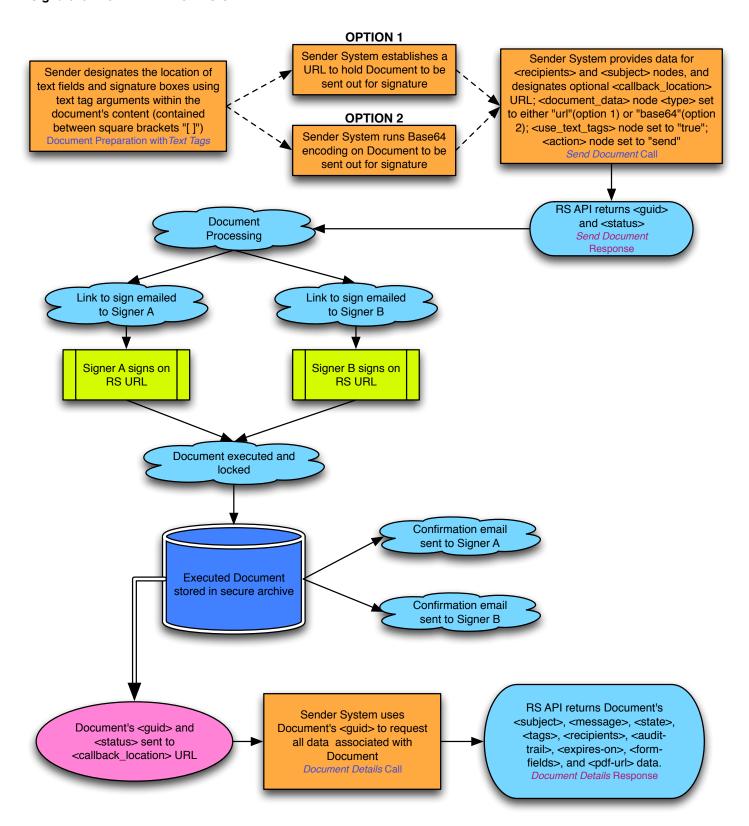
<callback_location> URL

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Send: One-Off Document

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

Sent By: Sender System Signature Event: On RS URL



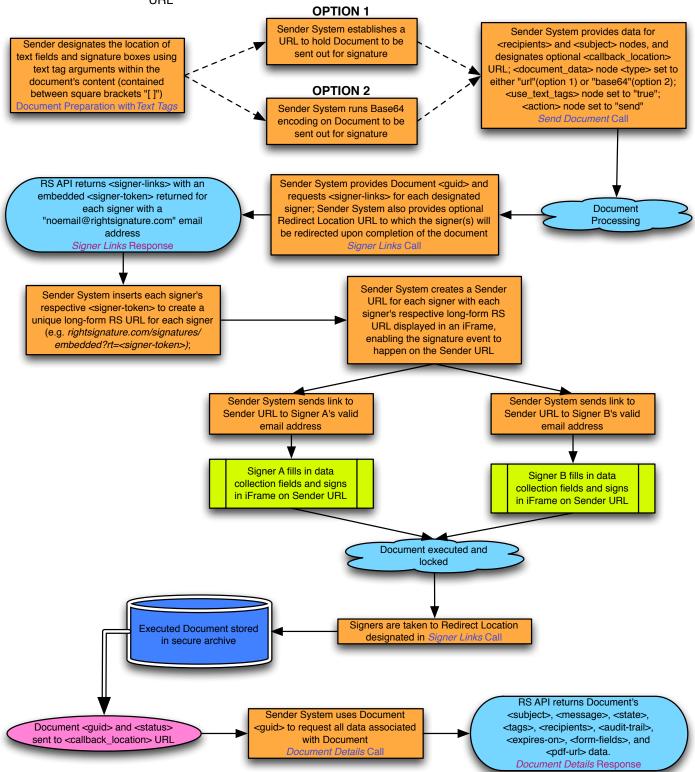
Send: One-Off Document(s)

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

Sent By: Sender System

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

URL



Send: One-Off Document(s)

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

Sent By: Sender System

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

