Project Requirement Document for a SaaS Digital Signature Platform

Objective: To develop a subscription-based SaaS digital signature platform that enables users to securely upload, send, and electronically sign documents. The platform should offer an enhanced, competitive alternative to existing options in the market.

1. Project Overview

- **Platform Type**: Web-based SaaS platform with mobile responsiveness
- **Target Audience**: Businesses and individual professionals needing a secure document signing solution
- **Key Competitors**: DocuSign, Legalesign
- **USP (Unique Selling Point)**: Enhanced features for security, user experience, and automation

2. Core Features and Functional Requirements

a. User Accounts & Access

- **User Registration and Login**: Social login options, email verification, and two-factor authentication (2FA) options.
- **Subscription Models**: Monthly and yearly payment options, with a variety of subscription tiers (e.g., basic, professional, and enterprise).
- **Admin & User Roles**: Admin-level access with permissions to create, edit, and delete documents and manage user access.

b. Document Management

- **Document Upload**: Users can upload documents in various formats (PDF, DOCX, etc.).
- **Template Creation**: Option to save frequently used templates.
- **Document Organization**: Categorize documents by folders, tags, and a searchable archive.

c. Digital Signature & Workflow

- **Signature Options**: Standard electronic signatures, initials, date stamps, and custom signature options.
- **Sequential and Parallel Signing**: Define the signing order for documents, if needed.
- **Automated Reminders**: Automated emails and notifications to remind recipients to sign documents.
- **Audit Trail**: Detailed logs of all actions (viewing, signing, modifications) with time stamps.

d. Security and Compliance

- **Data Encryption**: In-transit and at-rest encryption, with SSL/TLS for data protection.
- **GDPR and eIDAS Compliance**: Ensure the platform meets EU data and electronic signature regulations.

- **User Authentication Options**: Multi-factor authentication and document password protection.
- **Document Integrity**: Hashing algorithms to ensure document integrity.

e. Notifications and Alerts

- **Email and In-app Notifications**: For document views, signature requests, and reminders.
- **Status Tracking**: View document status at a glance (sent, viewed, signed, completed).
- **Custom Notifications**: Ability for users to define custom notification triggers.

f. Integration Capabilities

- **APIs for Integration**: Provide an API to integrate the platform with other CRM and productivity tools (e.g., Salesforce, Google Drive).
- **Webhook Support**: To trigger events when certain actions (like document signing) occur.

g. Analytics & Reporting

- **Dashboard Analytics**: Display document usage, status summaries, and user engagement metrics.
- **Exportable Reports**: Generate and export audit logs, activity summaries, and usage metrics.

3. Technical Specifications

a. Suggested Technologies

- **Frontend**: React, Angular, or Vue for a dynamic user experience.
- **Backend**: Node.js, Django, or Laravel for a robust server-side application.
- **Database**: MySQL, PostgreSQL, or MongoDB for secure and scalable data storage.
- **Storage**: AWS S3, Google Cloud Storage, or Azure Blob Storage for document handling.
- **Authentication**: OAuth2, JWT tokens for secure user sessions.

b. Hosting & Server Requirements

- **Scalability**: Cloud-based hosting solution (AWS, Google Cloud, or Azure) to accommodate growth.
- **Load Balancing**: To handle high traffic and ensure consistent performance.
- **Server Security**: Ensure firewalls, DDOS protection, and regular security audits.

c. Subscription & Payment Gateway

- **Payment Integration**: Stripe, PayPal, or Braintree for secure payment handling.
- **Subscription Management**: Automated billing, subscription renewals, and cancellation options.

d. Data Storage and Backup

- **Database**: Ensure data integrity and regular backups to prevent loss.

- **Backup Frequency**: Weekly backups stored in a secure offsite location.

4. Additional Questions for the Developer

1. **Technology Stack**:
   - Which specific technologies and frameworks would you use to develop the platform, and why?
2. **Server Configuration and Costs**:
   - Please recommend a server configuration and expected hosting costs for initial deployment, including any anticipated scaling needs.
3. **Development Timeline**:
   - Estimated timeframe for each phase (design, development, testing, and deployment).
4. **Maintenance and Support**:
   - Post-launch support options, bug fixes, and updates.
   - Options for extended maintenance and feature updates.
5. **Data Security and Compliance Measures**:
   - How will you ensure compliance with GDPR, eIDAS, and other relevant regulations?
   - What security measures will be implemented to protect user data?

5. Additional Considerations

a. Future Scalability

- Plan for future feature updates, like mobile applications or additional integrations, without significant re-engineering.

b. Testing and Quality Assurance

- Comprehensive testing (unit, integration, and end-to-end) to ensure platform reliability.
- Beta testing period with selected users.

c. Documentation and Handover

- Detailed documentation for all code, API endpoints, and features.
- Training and onboarding documentation for both users and administrators.

Competitors:

https://www.docusign.com/

https://legalesign.com/