

## **Electronic Document Signature Scope**

Github: <https://github.com/Digpads-Dev>

(note: we are integrated with Heroku to do pushed from Github)

Server: Heroku

### **Terms**

#### **Phase 1:**

**Payment:** \$2,000

**Due on:** February 27th, 2022

**Payment Method:** Guru SafePay Release

#### **Requirements of Phase 1:**

- Basic UI and Main Functions Development  
Main Functions described as below.  
( Besides security , legal binding. These functions will be done on Phase 2 )

#### **Phase 2:**

**Payment:** \$3,000

**Due on:** Mar 29, 2022

**Payment Method:** Guru SafePay Release

#### **Requirements of Phase 2:**

- Correction of errors and feedback on functions and refinement of User Interface.

Full Functionality is required for full payment. Without full functionality as detailed, a full refund of all payment will be issued.

### **Locations**

- Digpads: [www.digpads.com](http://www.digpads.com)

- Landlord Tools (<https://digpads.com/landlord-tools/dashboard>) is where this will be built, the domain is hidden right now. The password is: **er54Gp5#1**
- Documents is the primary place to build the majority of the features  
<https://digpads.com/landlord-tools/documents>.
- Quick Send is on the Dashboard page: (<https://digpads.com/landlord-tools/dashboard>) as a button.
- Settings: <https://digpads.com/settings>
  - May be utilized where/if needed for higher level settings for user if Documents does not make sense. Note: this is behind the login wall.

### **Definitions**

- **Envelope:** this is a document with fields and signatures added to the appropriate places that has been or will be sent to another user for signature.
- **Envelope View:** where the user who sends an envelope add fields, signers, the flow, and
- **Sender:** The primary user who sends the Envelope to other Recipients. This is the core client we serve. There is only one Sender but a Coordinator may act as a Sender.
- **Coordinator:** A user that can act as a Sender that is given permissions as a Recipient but is not the actual Sender.
- **Recipient:** This is the secondary user who receives the Envelope to sign it.
- **Permissions:** What a user is able to do based on their user type.
- **Tracking Links:** Links to the status for users sent with each update email.

### **Basic**

- **Login:** Users login via the standard login from [www.digpads.com](http://www.digpads.com)
- **SignUp:** Users Signup via the standard sign up on [www.digpads.com](http://www.digpads.com)
- **Homepage:** Users have login and signup from existing homepages at [www.digpads.com](http://www.digpads.com)

### **Main Functions:**

These will all be built into [www.digpads.com/landlord-tools](http://www.digpads.com/landlord-tools).

- **PDF and Word document uploading:** [www.digpads.com](http://www.digpads.com)
  - Upload: Users can upload PDF or Word Documents from Documents column Tab in Landlord Tools
  - Users can store documents at the Documents tab in Landlord tools.
- **Standard Editable Fields and Customizable Fields:** these are the boxes that hover over areas where specific information is entered around text on a document.
  - Users can enter Editable fields in Envelope View from the Documents tab

- Users can create custom fields to enter anywhere on a document from Documents tab
- Admin can create standard fields for boxes that show up in a library of options form user console
- **Combined PDFs**
  - Users can Combine PDFs at the Documents tab
- **Electronic Sign:** Ability to sign documents digitally and on a device in person.
  - Sign documents electronically with electronic signatures and on a device.
  - Need mobile responsive design for document signage in person.
  - Signage flow when users receive pre-made “envelopes” for signature.
- **Envelope Sending:** Ability to send envelopes with EDS documents to user email addresses within Envelope View. A list of organized envelopes are important as well.
  - Add Signers by email address (no account required)
  - Establish order of signers (who signs in what order) - this can be any order Sender desires.
  - Have same fields for all signers or different fields by signer based on user needs
    - Preset fields and custom fields (just a blank space to fill in data)
  - Drop signature fields where needed
  - Send to recipients.
  - Cancel envelope at any time if not yet signed.
  - Edit Envelope if needed so long as not in process flow.
- **User Console:** for the user who initiates the PDF EDS and the receivers who receive it (limited for users). This is basically everything you build into Documents.
- **Stored Templates:** users can store template documents with preset fields to be utilized in the future and save the templates and organize them as desired from the Documents tab.
  - Need folder organization system users can set as well.
- **Save Forms:** Users can create webforms that are utilized as links that can be shared that have fields that have questions or labels where information is entered by others.
  - Saved forms that users can utilize for like the EDS that receive answers from users and are saved to the Console.
  - Editing existing webforms.
  - Repository for webform reply instances.
- **Document Audits:**
  - Time stamp on envelopes (sent EDS documents) when documents are completed that show the time, date, and signer names along with the date both signed outside of the margins stamped on the document.
  - User Console to track the progress of where an envelope.

- **User Updates:** User ability to see document status from Console and for users to receive email notification to sign, updates on the process, and when documents are signed (SendGrid account exists and can be used for this unless there is an alternative - price sensitivity here)
  - Track all Actions of Users with Documents from the User Console (User who sends Envelope). Sender Receives all these notifications but Recipients receive the Completed with the completed document.:
    - **Sent:** After the envelope has been sent.
    - **Waiting to Sign:** After the envelope has been opened
    - **On Hold:** This is when Comments come over.
    - **Rejected:** This is when the Recipient rejects the document. They can write a comment in the reject that goes back to the Sender.
    - **Completed:** This is when a document is completed. A fully executed document is sent to all recipients and saved in the Sender's Documents folder for Completed Documents.
- **Branding:** on document header and footer as large field.
- **Comments:** Users able to write comments on documents and for other users to see the comments and reply to them within the Envelope. This should be able to be turned off by the Sender in the Envelope if desired.
- **Quick Send:** A "Quick Send" version where a document is uploaded, no fields exist, and only the signature field is required to be filled in after it is sent. The Quick Send is on the Dashboard of Landlord Tools.
- **Bulk Send:** Mass send to unlimited email addresses.
  - Built into Documents and Envelope instances.
- **Download Documents:** Ability to download documents from the Console.
- **Completed Documents Set to Email Addresses of All Recipients:** All users received fully signed document when all users have signed
- **Time Stamping:** Documents from EDS must be time stamped for when they were executed by all parties.
- **Signature Setup:** User ability to upload one, auto-create a default, or sign and save signature for themselves for quick usage.

#### Permissions by Role:

- **Sender:**
  - All Permissions.
- **Collaborator:**

- Can be granted all permissions by Sender but is not the master Admin.
- **Receiver:**
  - Limited to:
    - Receiving
    - Checking Status via links
    - Filling in Fields
    - Commenting (if allowed by Sender or Collaborator)
    - Receiving final executed copy

**Security:** It's important to build this to be as secure as possible. The website security is on me. Envelopes must be secured even if going to email addresses.

**Legally Binding:** the document below and the pasted in images explain the legal requirements for the signatures to be legally binding in the United States. I believe that the build will cover this but please review and consider these in your build.

<https://www.adobe.com/content/dam/dx-dc/pdf/ue/adobe-sign-us-guide-e-signatures-wp-ue.pdf>

### Intent to sign.

As with a handwritten signature, a signer must show clear intent to sign an agreement electronically. For example, signers can show intention by using a mouse to draw their signature, typing their name, or clicking an "Accept" button that is clearly labeled.

### Consent to do business electronically.

Most electronic signature laws also require some form of consent to do business electronically. Many enterprise electronic signature solutions ask signers to "click to accept" a standard consent clause or provide an option to customize a consent clause such as:

*The parties agree that this agreement may be electronically signed. The parties agree that the electronic signatures appearing on this agreement are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.*

### Opt-out clause.

If a signer elects to opt out of signing an agreement electronically, clear instructions on how to sign an agreement manually should be easily accessible as part of the signature workflow.

### Signed copies.

All signers should receive a fully executed copy of the agreement. Many electronic signature solutions automatically provide executed copies of agreements to signers as part of the approval workflow.

### Record retention.

Record retention requirements are addressed via the E-SIGN Act, which legitimized the validity of electronic records as long as they accurately reflect the agreement and can be reproduced as required. Often this requirement is met by providing a fully executed copy to the signer or permitting the signer to download a copy of the agreement.