

DocuSign

Last Modified on 23/02/2024 10:49 am EST

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How does it work?

RentalPoint provides functionality to request a digital signature from clients for Fast Report custom documents produced in RentalPoint (i.e. Quotes, Booking Hardcopies etc) by integrating with DocuSign software!

Requirements

You'll need

- a DocuSign Account with an App Integration Key for RentalPoint (see below for DocuSign setup)
- Fast Report Custom Templates using DocuSign caption fields [<more on Fast Reports>](#)

Setup

DocuSign Setup

You'll need a subscription to DocuSign. If you already have one, then skip to 'App Integration Key' below.

[DocuSign Subscriptions](#)

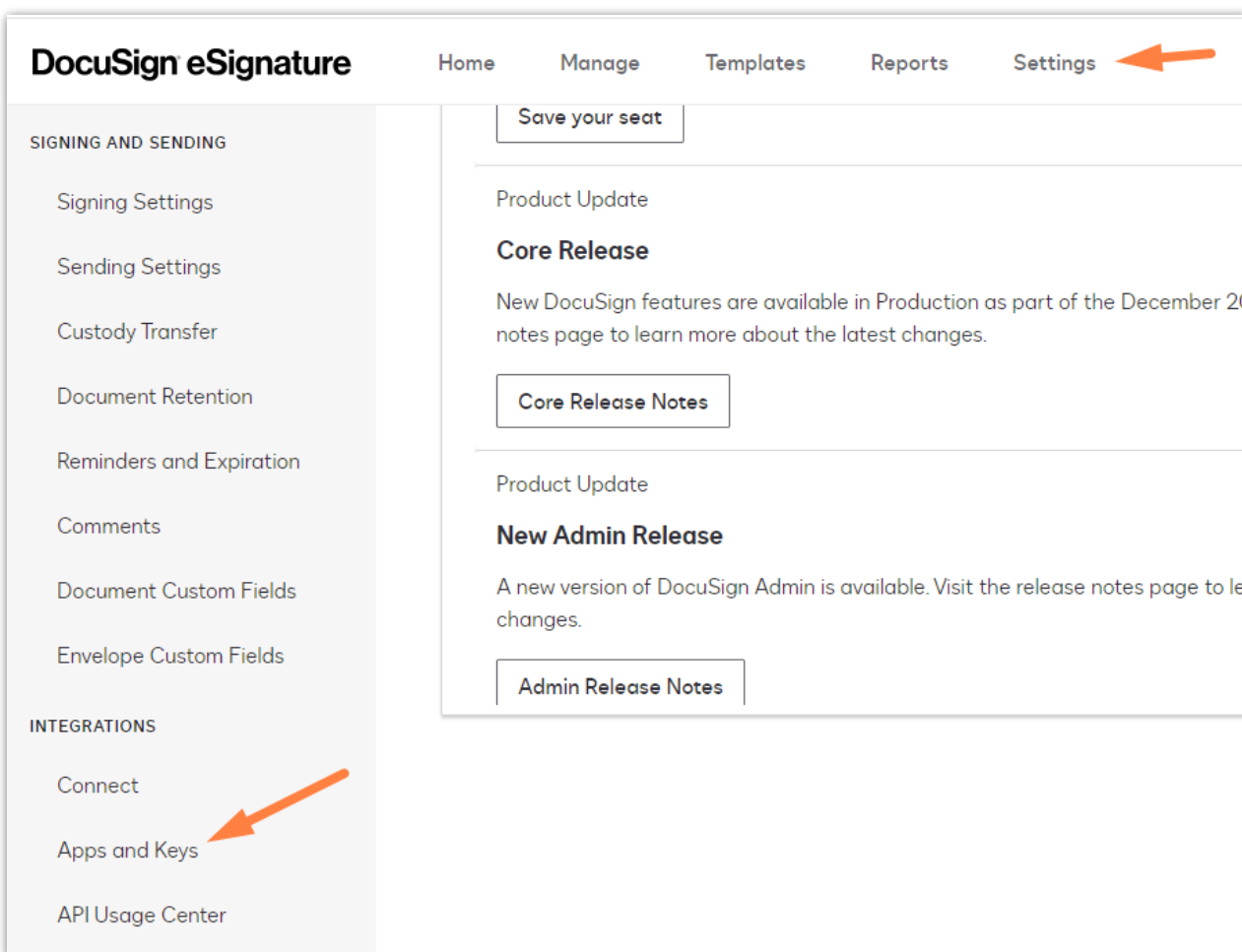
- For DocuSign, you would need a subscription for each email that will be used to send envelopes for signing.

The type of subscription would depend on the number of envelopes you anticipate sending out per month and the number of emails those envelopes would be sent from.

- **Envelopes Defined:** In DocuSign, an envelope is a container for documents that you send to a recipient to sign. An envelope can have one document or many documents, and one signer or many signers. Envelopes have statuses (i.e. sent, delivered, completed, voided) and also contain information about the sender and timestamps that indicate the progress of the delivery procedure. Regardless of how many documents, fields, and signers a given envelope contains, it still counts only once towards your eSignature plan's envelope allowance once it is sent out to be signed.
- DocuSign have a range of options available including advanced solitons that can be customized to your company requirements. [<DocuSign Subscriptions and Pricing>](#)

Set up your DocuSign App Integration Key

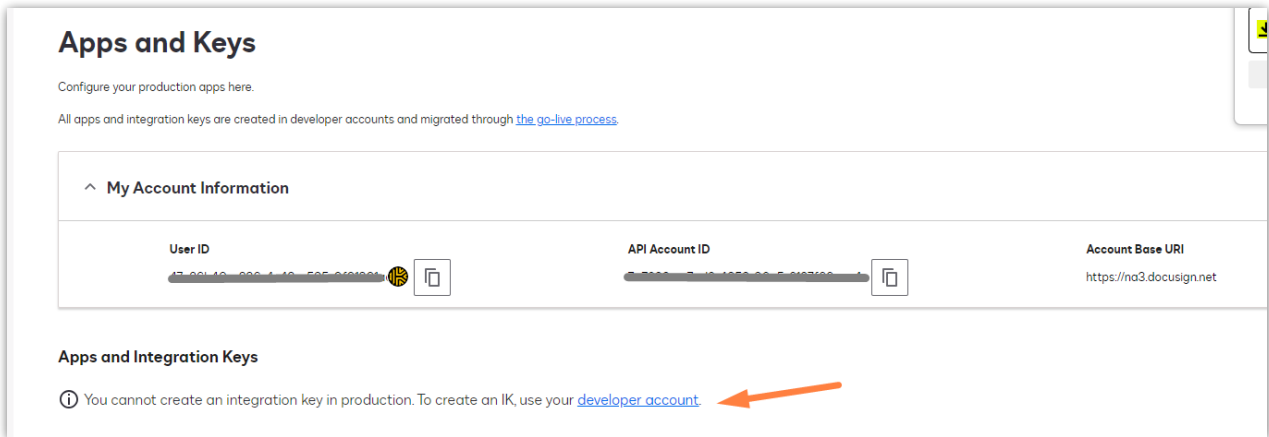
From your DocuSign Production account, click on Settings, then APIs and Keys



The screenshot displays the DocuSign eSignature dashboard. At the top, there is a navigation bar with the following items: Home, Manage, Templates, Reports, and Settings. An orange arrow points to the 'Settings' link. On the left side, there is a vertical navigation menu with two main sections: 'SIGNING AND SENDING' and 'INTEGRATIONS'. Under 'SIGNING AND SENDING', the items are: Signing Settings, Sending Settings, Custody Transfer, Document Retention, Reminders and Expiration, Comments, Document Custom Fields, and Envelope Custom Fields. Under 'INTEGRATIONS', the items are: Connect, Apps and Keys, and API Usage Center. An orange arrow points to the 'Apps and Keys' link. The main content area on the right contains a 'Save your seat' button, followed by a 'Product Update' section titled 'Core Release' with a 'Core Release Notes' button. Below that is another 'Product Update' section titled 'New Admin Release' with an 'Admin Release Notes' button.

DocuSign requires that you set up a new App Integration Key in a developer account so that it can

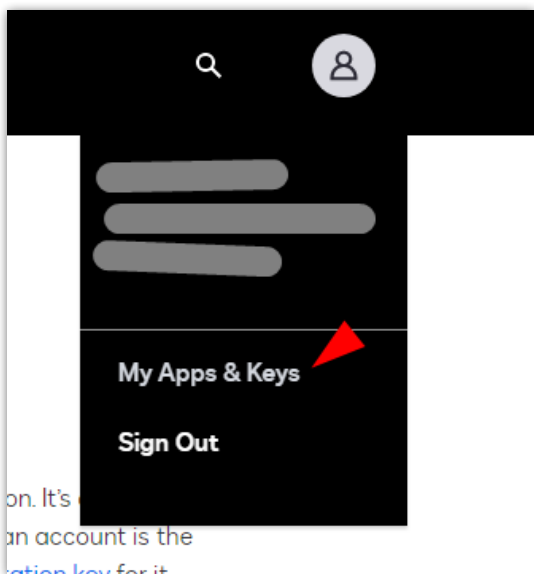
be validated before it can 'Go Live' in production, so click the developer account link to go there



If you don't have a developer account, you can create one here or log into your existing developer account




Goto My APIs and Keys



Click on 'ADD APP/ INTEGRATION KEY'

Apps and Integration Keys

App Name	Integration Key	Environment	Go Live Status
----------	-----------------	-------------	----------------

 [ADD APP AND INTEGRATION KEY](#)

Enter a name and click ADD

Add API Integration Key


App Name *

[ADD](#) [CANCEL](#)


Under Authentication, select YES for User Application

Authentication

Not sure which settings to use? [Learn more](#)

 **User Application**

Is your application able to securely store a client secret?

Yes 

No

Authentication Method for your App

Authorization Code Grant

Used for integrations where each user logs in individually and requires a one-time consent for the app to use their account.

Require Proof Key for Code Exchange (PKCE) **RECOMMENDED**

Requires all requests to include a code verifier and code challenge, which protects your app against malicious attacks.

Secret Keys

[+ Add Secret Key](#)

Generate an RSA



Service Integration

DocuSign can generate a keypair for you or you can upload your own public key.

RSA Keypairs (ID)



+ Generate RSA

+ Upload RSA

Create two Notepad txt files using the names below , then use the copy buttons to copy the keys

- paste the private key to docusign-private.pem
- paste the public key to docusign-public.pem

RSA Keypair



This keypair is used for JSON Web Token (JWT) authentication and is only valid for the environment in which it is generated.

Keypair ID:

ec0e493f-495b-469f-8c6a-4b17835e7950



Copy both of these keys to a safe location, they will not be displayed again.

Public Key

-----BEGIN PUBLIC KEY-----

```
MIIBIjANBgkqhkiG9w0BAQEFAAOCAQ8AMIIBCgKCAQEAhJr+1+8LKTKNz7soXYo0
jzV5wJRgXALVYS+nkBgXwTaEukSV0ppezGAzi/eQhoDySAX9JvMbsnCr0r4Yf+1q
uaEgk0+oWfmoiFB+uKEeTLNKKQv7EO/MAR/UGg7NT1P8WylGZVZ4y7IeJbwuah2Y
DH/hU7hQcT6ZY9XZy9FA5G6sJwj4d9ut580rT8u4i30Z/OHmVnVOZynszZ/0Rnv
70Fok8T0xCRgITNPj8bgkc520ijSrG1YhbEGGBaZQHEezpIGWG42n1L9oQe3k7n5
KQGhmKK5AvAEiPvgCBcmUUi+REtZk+7uQ8nzKaf4EZQ4h7GFNG1YJ+RY+O5w+VVO
CQIDAQAB
-----END PUBLIC KEY-----
```



Private Key

-----BEGIN RSA PRIVATE KEY-----

```
MIIIEogIBAACAQEAhJr+1+8LKTKNz7soXYo0jzV5wJRgXALVYS+nkBgXwTaEukSV
0ppezGAzi/eQhoDySAX9JvMbsnCr0r4Yf+1quaEgk0+oWfmoiFB+uKEeTLNKKQv7
```



Close

Under Additional Settings click **Add URI** , then in the box that appears enter the following URL

<https://developers.docusign.com/platform/auth/consent>


Additional settings

Redirect URIs

Link to Privacy Policy

Link to Terms of Use

Scroll to the bottom of the page and click SAVE



The Integration Key will now display in the list, click on the key to edit

App Name	Integration Key	Status	
RentalPoint	130dd04b-a656-4b0a-b8c0-e1c77b6452d4	Demo	<input type="button" value="ACTIONS"/>

Copy your Integration Key for use in RentalPoint setup

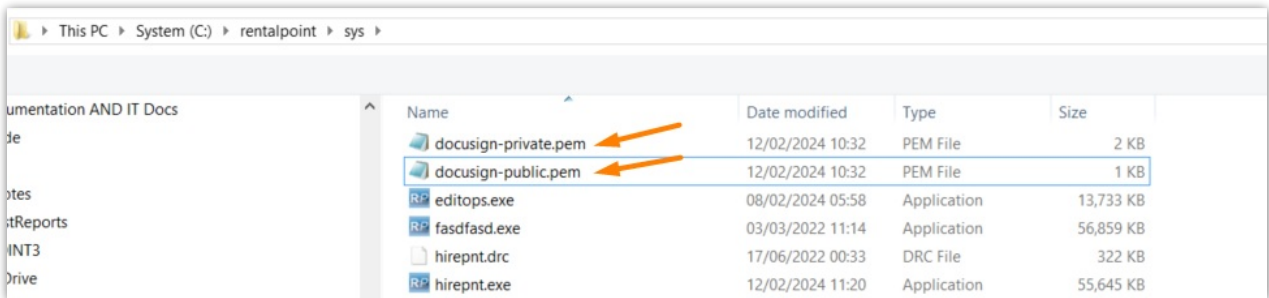
Integration Key
Your integration key (also known as a client id) is a unique identifier for your app.

Configure DocuSign in RentalPoint2

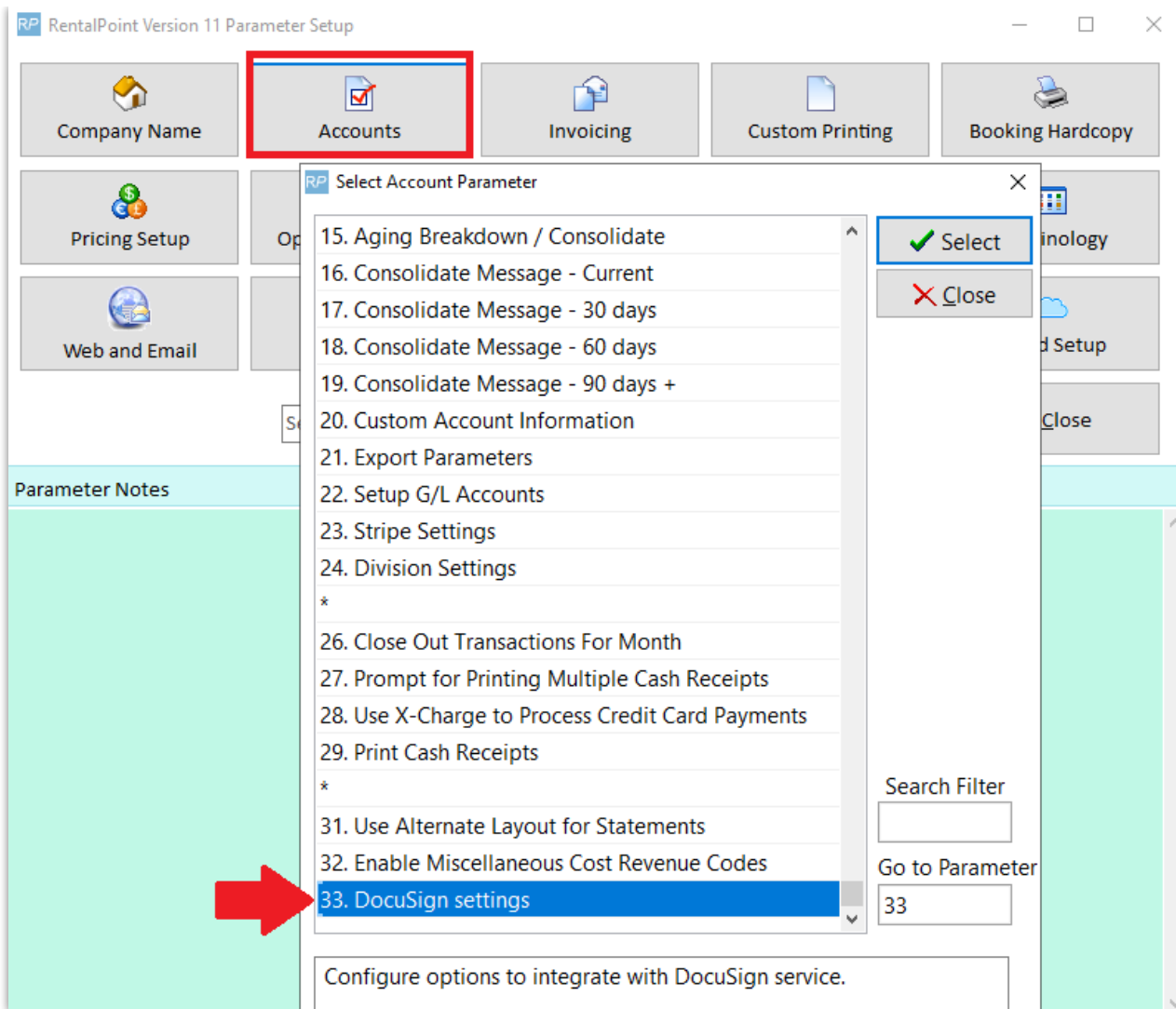
You'll need a DocuSign Account in order to set up DocuSign in RentalPoint, see DocuSign Setup above for more details.

Navigate to your live RentalPoint\sys folder and paste the txt files you created when setting up your Integration Key above.

- docusign-private.pem
- docusign-public.pem



From your RentalPoint menu, Goto Setup-->Parameters-->Accounts-->33 to enable DocuSign in RentalPoint



If your App Integration Key is not live, follow instructions for Developer Mode below. Otherwise follow the instructions for Production Mode.

Promote your Integration Key from Developer to Production Mode

With a new App Integration Key, you'll need to send 20 calls before you can 'go live' with a production key. Set your DocuSign Parameter to Developer and paste your Integration Key and User ID into the fields provided.

DocuSign Settings

Enter the details for the DocuSign account.

Developer Production

DocuSign Parameters

DocuSign App Integration Key

eb*****_****_****_*****bb

DocuSign User ID

efb5a19b-b6e1-4100-baf8-5d47*****72

Sign caption

SIGN HERE

Name caption

PRINT HERE

OK Cancel

Apps and Keys

When building a DocuSign integration, you must first create an app and integration key. This key is required. Create apps and keys manually or edit keys created automatically for you by [Quickstart](#).

My Account Information

User ID: efb5a19b-b6e1-4100-baf8-5d47*****72

Apps and Integration Keys

App Name	Integration Key
RP2TEST2	eb8daf50-0651-4a58-9179-118*****

The Sign Caption and Name Caption values are what your user will see on the document they are asked to sign. Everytime you change these values, you'll need to re-add the fields to any Fast Report template in use.

Sign place: SIGN HERE

Name place: PRINT HERE

Click  to save, then log out of RentalPoint and back in again before testing.

Authorize your Integration Key

Now that your developer Integration key is set up, you'll need to make 20 API (app integration) calls before DocuSign will allow you to send your key to production. To make your first call, click on any booking then Print-->Fast Report-->Custom using Template

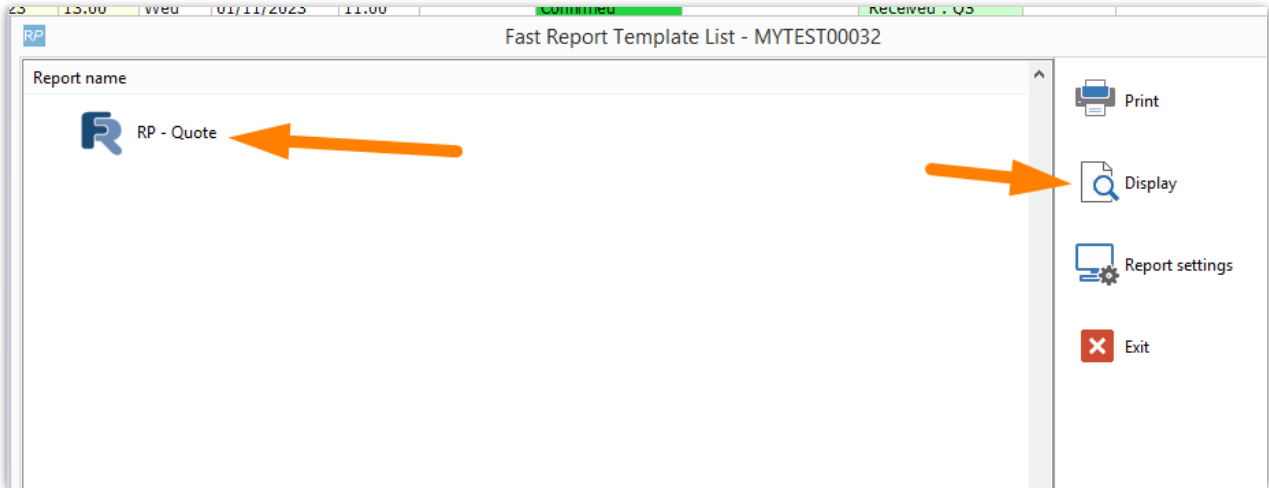
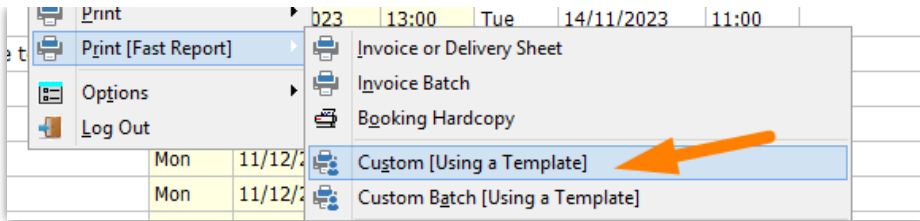
Admin Financials Print Refresh

Quote or Other Document Using Template

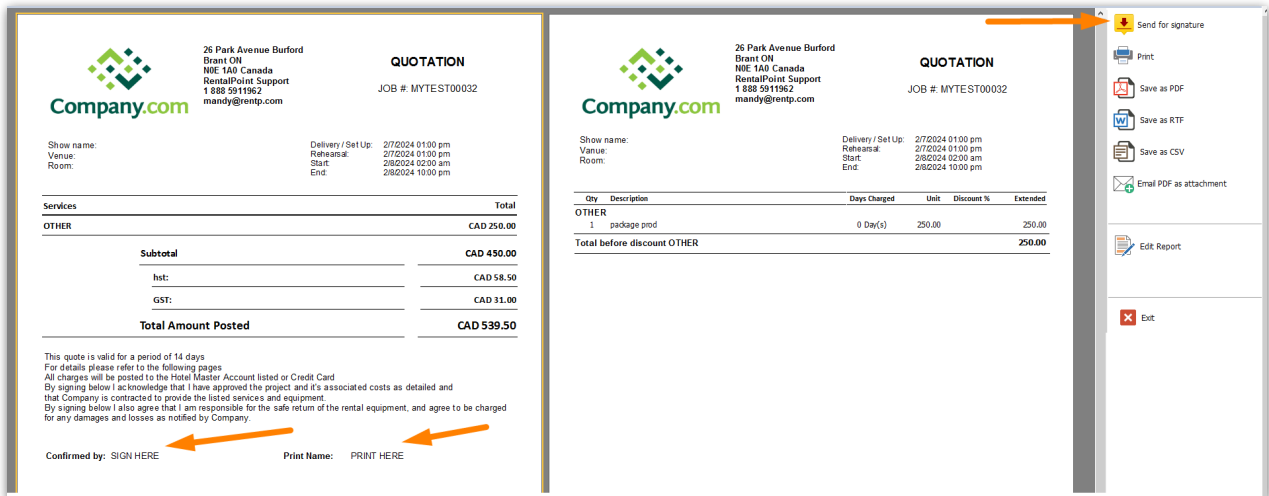
Standard Invoice or Delivery Sheet

Fast Report

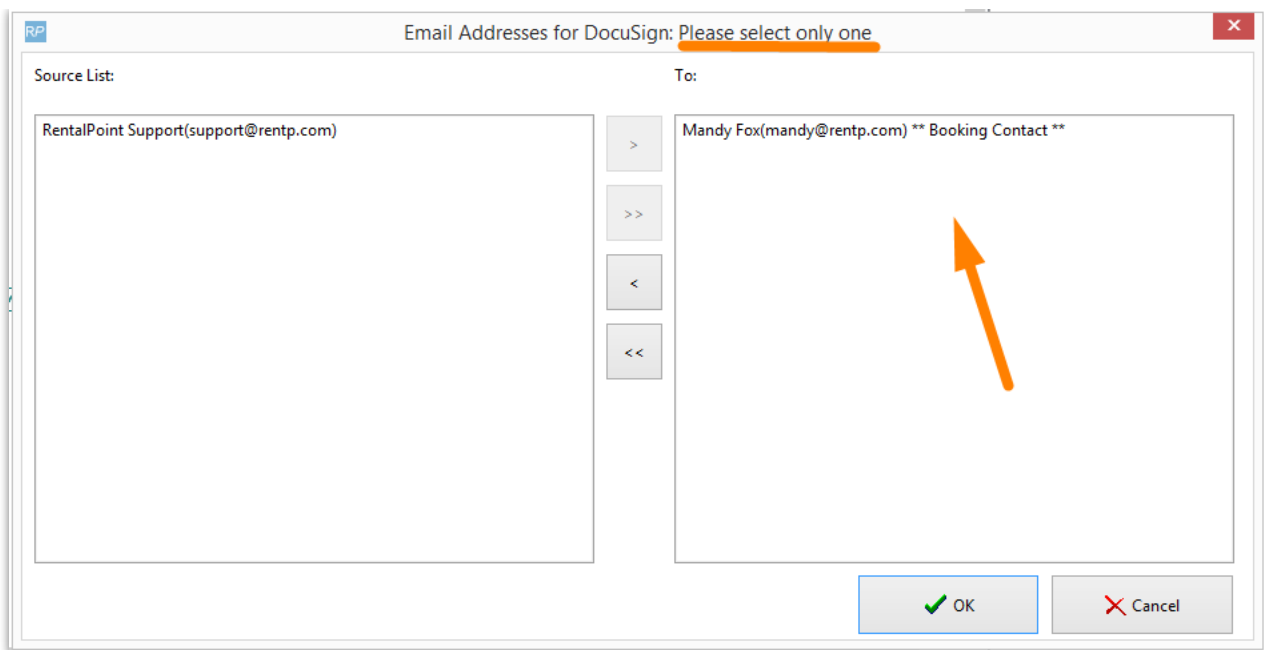
OR access from the right click menu



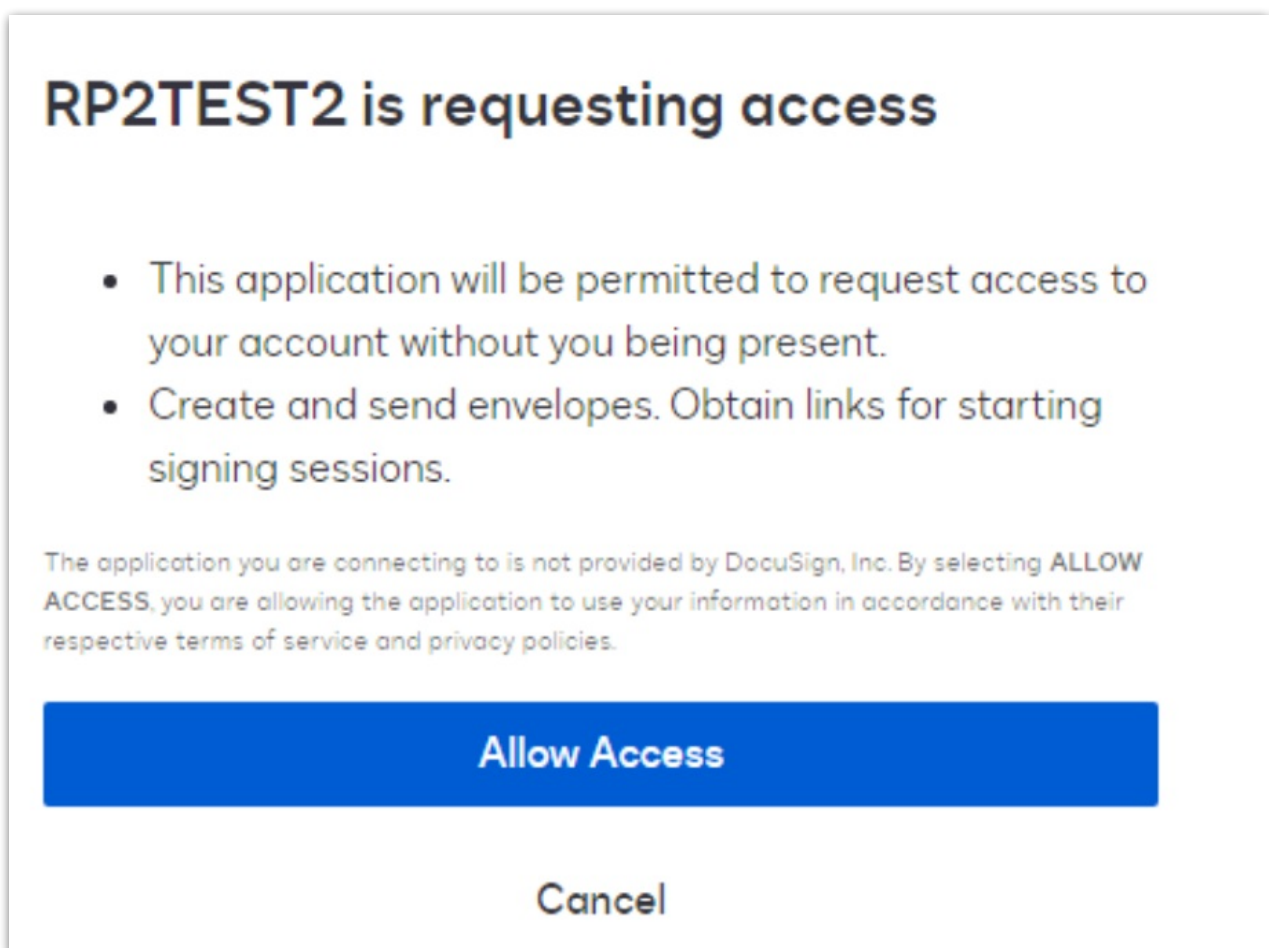
When the DocuSign caption fields are detected on a template, the user will have an option to send the document for signature



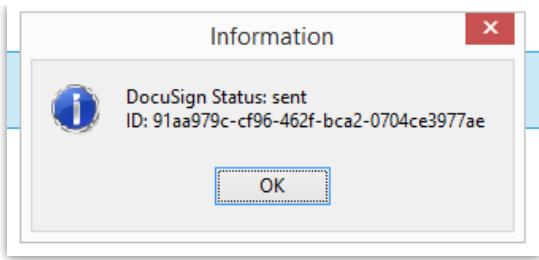
Select one recipient, then click OK



The first time you send to DocuSign from RentalPoint, you'll be asked to grant access permission to RentalPoint. Click Allow Access.



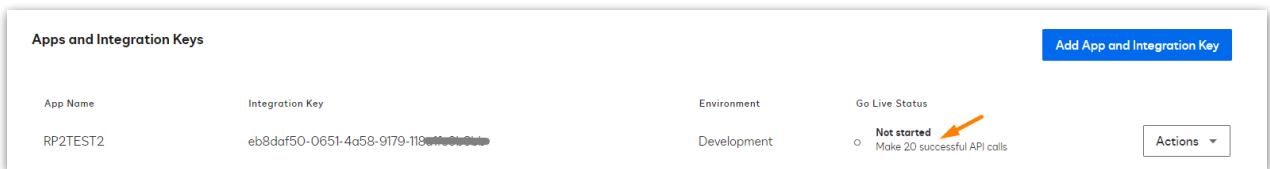
You should then get a confirmation receipt.



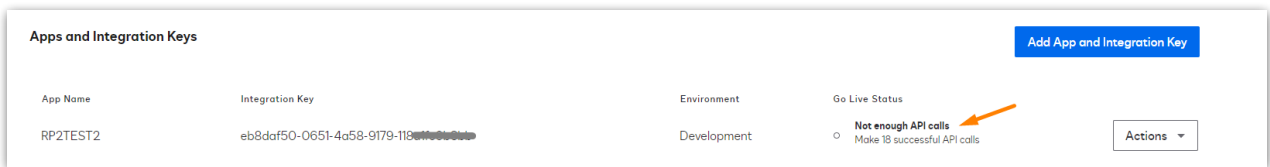
If you don't get this receipt, check your setup again and contact support@rentp.com if needed. You cannot proceed to next steps without passing this step successfully.

Request a 'Go Live' status for your DocuSign Integration Key

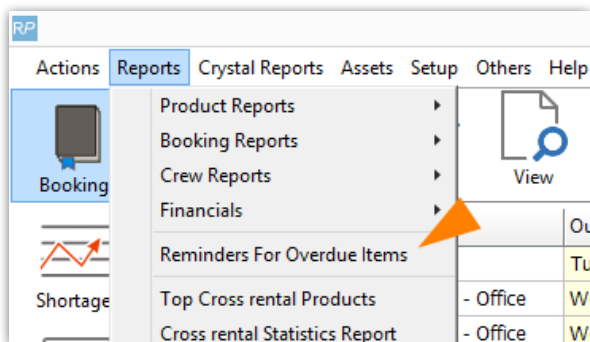
DocuSign requires all App Integrations to be set up in Demo status until 20 confirmed API calls are performed to test the integration.



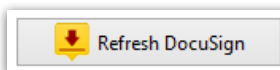
Each successful call (send for signature from RentalPoint) will be registered with DocuSign until at least 20 successful calls have been made



After your first call and authorization grant (see above), you can quickly submit 20 API calls, via the Reminder for Overdue Items window



From the DocuSign Tab, click



20 times

Reminders For Overdue Items

Overdue Unconfirmed Bookings | Overdue For Checkout | Overdue For Return | **DocuSign Quotes**

Booking	Organisation	Show Name	Out date	In date	Salesperso	Amount	Progres	DS
300100039	Inhouse Systems		26/06/2023	26/06/2023	RE	0	Confirmed	Sent
AED100011	AED Customer		10/09/2013	31/12/2079	RP	5911.62	Confirmed	Sent
AED100013	AED Customer		31/08/2020	05/09/2020	RP	97679.9800	Confirmed	Sent
MRCI00014	MRC Industries	Winter Trade Show 2023	25/05/2023	25/05/2023	RP1	717.4	Confirmed	Sent
MYTEST00032	MyTest		07/02/2024	09/02/2024	RP	539.5	Confirmed	Sent
TEST546300002	Testing PR5463	Testing PR5463	20/05/2023	20/05/2023	RP1	119	Confirmed	Sent

Open Booking | Refresh DocuSign | Refresh

Display Preferences

- Overdue For Invoicing
- Overdue For Project Invoicing
- Bookings To Be Re-Invoiced
- Long Term To Be Invoiced
- Job Reports
- POs to be Reviewed
- Cross rental Review
- Target Margins
- Virtual Carnet
- Orphaned Cross rentals
- DocuSign documents

Location Scope

- All
- Location

1 - Office

Reset Timer | Print | Close

It may take a few minutes for DocuSign to upgrade your 'Go Live Status'. Once enough API calls have been made, you can submit your key for review

Apps and Integration Keys Add App and Integration Key

App Name	Integration Key	Environment	Go Live Status	Actions
RP2TEST2	eb8daf50-0651-4a58-9179-119...	Development	Submit for review	Actions

Click 'submit for review'

Request App Review

Requirements to pass review:

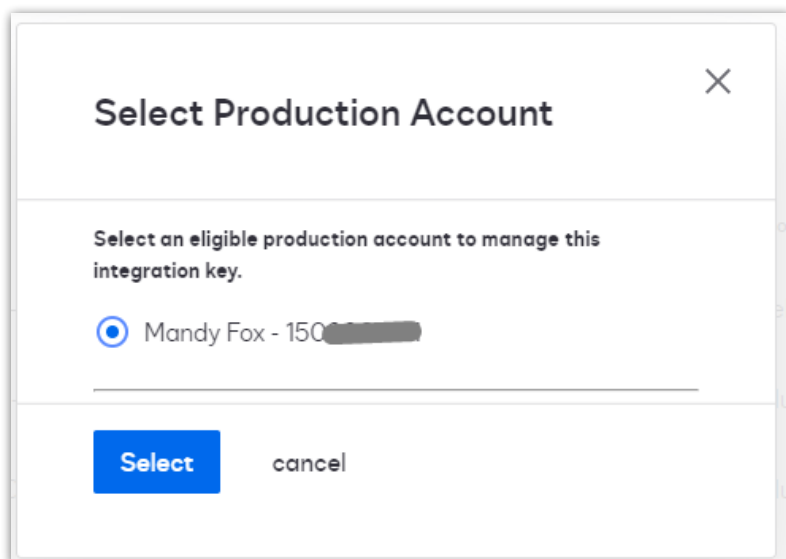
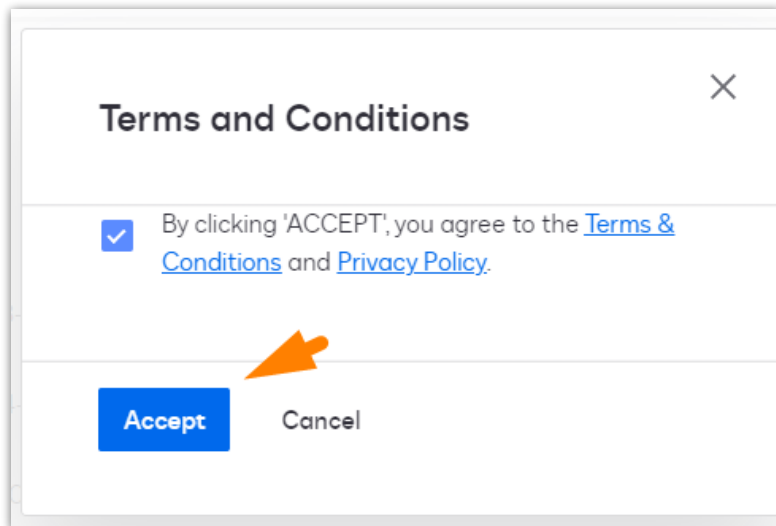
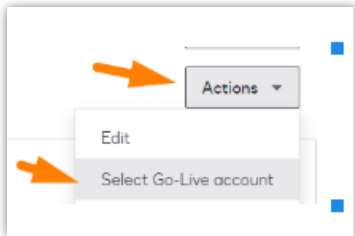
- Complete 20 consecutive successful API calls in the past 30 days
- Use [OAuth 2.0 or App Password \(for eSignature SOAP API only\)](#)
- Comply With DocuSign [API rules and limits](#).

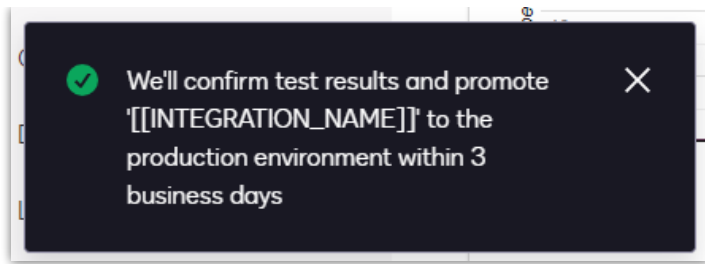
Reviews may take up to 20 minutes.

Submit for Review | Cancel

Once passed, the status will change and you can promote your key to production

Apps and Integration Keys				Add App and Integration Key
App Name	Integration Key	Environment	Go Live Status	
RP2TEST2	eb8daf50-0651-4a58-9170-000000000000	Development	Review passed Promote to production	Actions





The status will be updated once approval has been granted.

Apps and Integration Keys				Add App and Integration Key
App Name	Integration Key	Environment	Go Live Status	
RP2TEST2	eb8daf50-0651-4a58-9179-118a1fe9b3bb	Development	● Pending approval Review may take up to 48 hours	Actions ▾

Production Mode

Once your App Integration Key is live in DocuSign you'll see the status change in your DocuSign developer account

Click View in Production

Apps and Integration Keys				Add App and Integration Key
App Name	Integration Key	Environment	Go Live Status	
RP2TEST2	eb8daf50-0651-4a58-9179-118a1fe9b3bb	Development	● App is live View in production	Actions ▾

Then edit the key in Production. The integration key is promoted but the other settings need to be edited again.

Apps and Integration Keys			
ⓘ You cannot create an integration key in production. To create an IK, use your developer account .			
App Name	Integration Key		Actions ▾
RP2TEST2	26470d04-ac30-454b-937f-06ba646b6b9a		Edit

Ensure the settings are correct

Mandy Fox

Edit your application name, choose an authentication method, and configure additional settings.

General Info

App Name *

RP2TEST2

Integration Key

eb8daf50-0651-4a58-9179-118a1fe9b3bb



Authentication

Not sure which settings to use? [Learn more](#)



User Application

Is your application able to securely store a client secret?

Yes

No

Authentication Method for your App

Authorization Code Grant

Used for integrations where each user logs in individually and requires a one-time consent for the app to use their account.

Require Proof Key for Code Exchange (PKCE) **RECOMMENDED**

Generate an RSA and add the redirect url <https://developers.docusign.com/platform/auth/consent> and save

Service Integration

DocuSign can generate a keypair for you or you can upload your own public key.

RSA Keypairs (ID)

✕
2cc5e4b1-6b0d-49d4-8d48-82c4b527884b

+ Generate RSA

+ Upload RSA

Additional settings

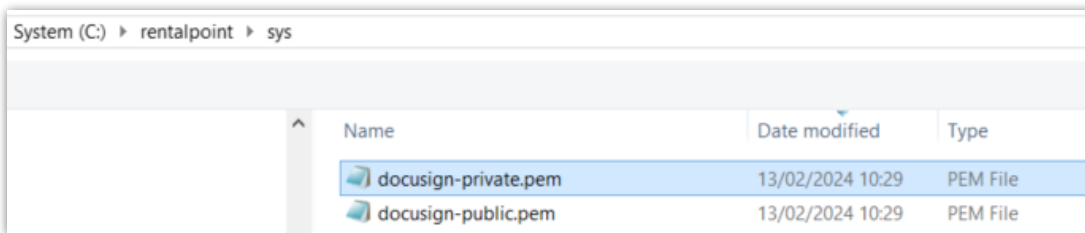
Redirect URIs

✕
https://developers.docusign.com/platform/auth/consent

+ Add URI

Update RentalPoint

Update the RSA public and private keys to the pem files in your RentalPoint folder



Then go to Accounts Parameter #33, switch your settings to production mode and copy the App Integration Key and User ID from the production account to your RentalPoint settings.

Enter the details for the DocuSign account.

Developer Production

DocuSign Parameters

DocuSign App Integration Key

eb8daf50-0651-4a58-9179-118a1fe9b3bb

DocuSign User ID

47c26b40-e336-4c43-a595-0f01801ac253

Sign caption

SIGN HERE

Name caption

PRINT HERE

✔ OK

✕ Cancel

Apps and Keys

Configure your production apps here.

All apps and integration keys are created in developer accounts and migrated through [the go-live process](#).

My Account Information

User ID	API Acc
47c26b40-e336-4c43-a595-0f01801ac253	7e7693

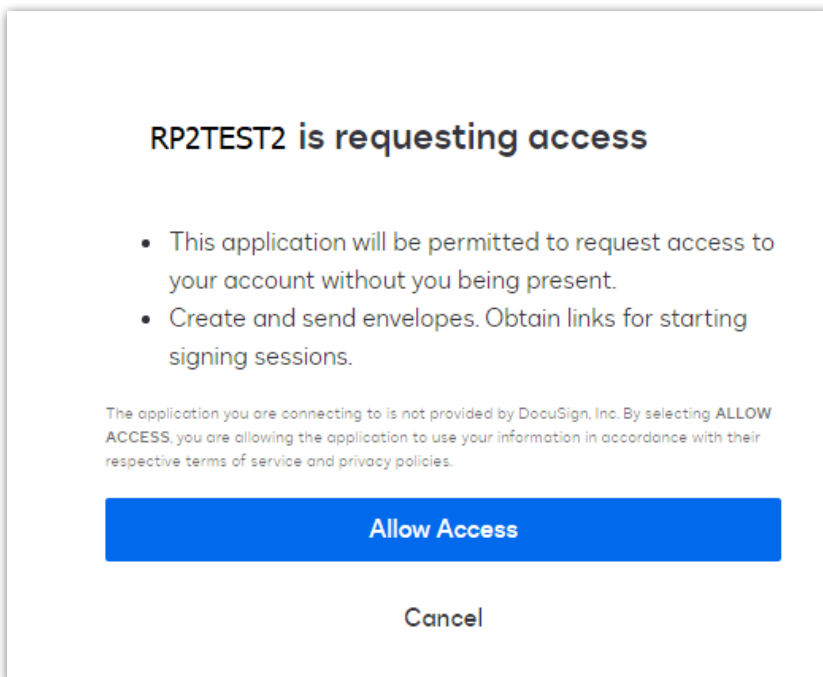
Apps and Integration Keys

ⓘ You cannot create an integration key in production. To create an IK, use your [developer acc](#)

App Name	Integration Key
RP2TEST2	eb8daf50-0651-4a58-9179-118a1fe9b3bb

Log out of RentalPoint and back in before testing.

The first time you send for DocuSign, you'll need to Grant access to your new key, then you should be all set!



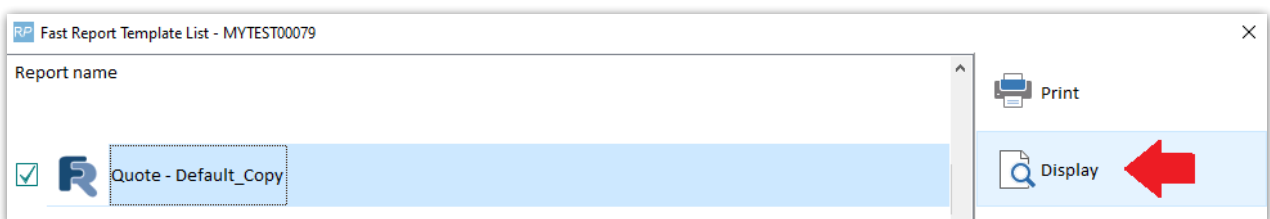
Using DocuSign in RentalPoint

Sending Documents for Signature

The DocuSign caption fields must be in use on your Fast Report in order to see the option to Send for signature illustrated below. Talk to your Fast Report specialist or contact support@rentp.com for help with adding these fields if needed.

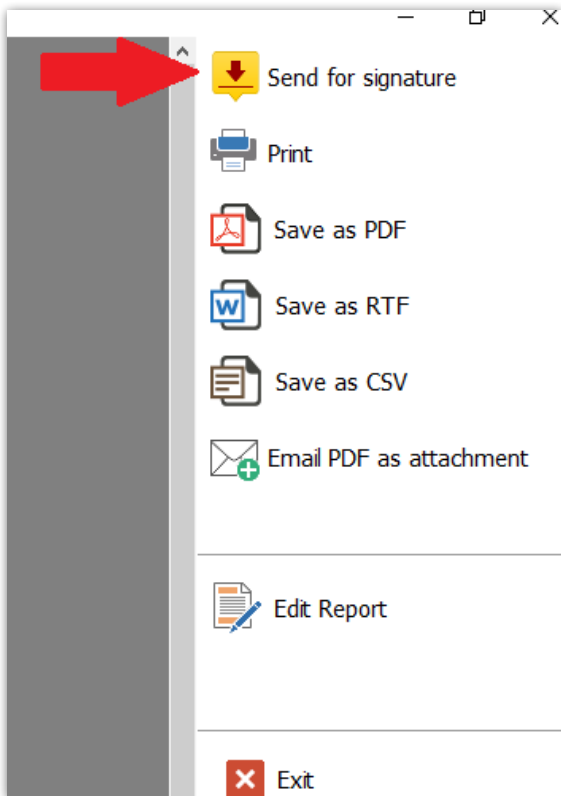


To send a document for signature, first display your Fast Report

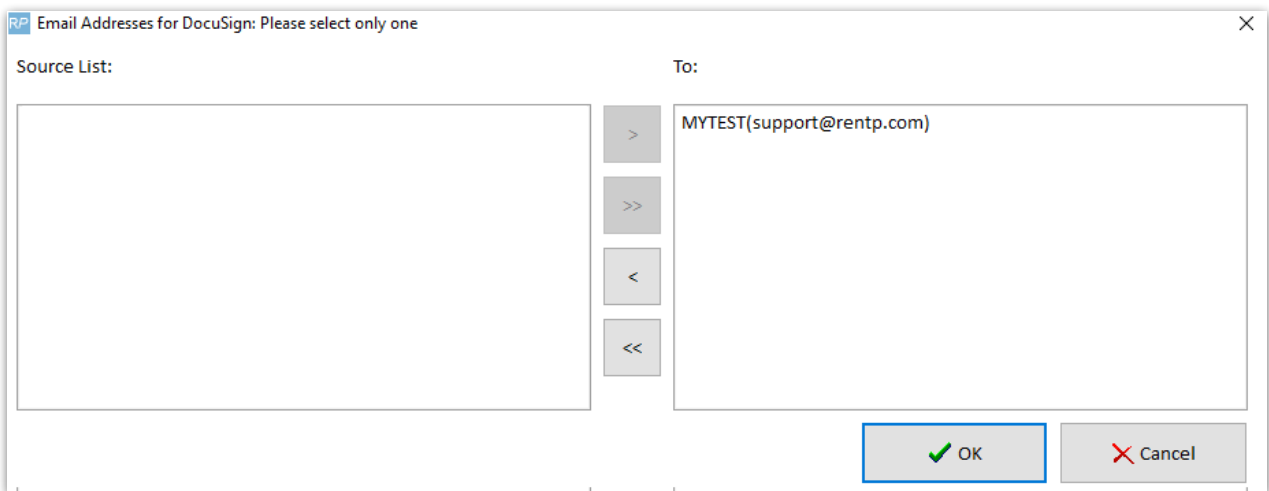


Then use the DocuSign 'Send for signature' option to request an electronic signature (if the

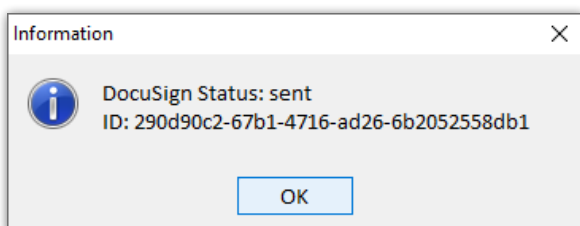
docuSign fields are not in your template you will not see this icon)



Choose One email address to send your document to

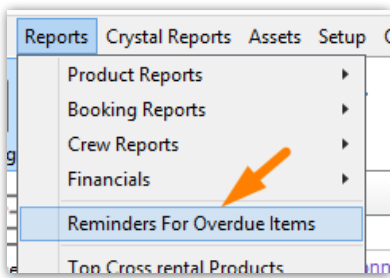


You may be required to log into your DocuSign account, once your password is confirmed, you'll get a confirmation number for your sent document.



View Documents Sent for Signature

Documents sent for signature are visible under 'Reminder for Overdue Items'



The 'Reminders For Overdue Items' window displays a table with the following data:

Booking	Organisation	Show Name	Out date	In date	Salesperso	Amount	Progres
300100039	Inhouse Systems		26/06/2023	26/06/2023	RE	0	Confirmed
ABC100043	abc company	The Small Show	07/10/2013	31/12/2079	RP	2500	Confirmed
AED100011	AED Customer		10/09/2013	31/12/2079	RP	5911.62	Confirmed
AED100013	AED Customer		31/08/2020	05/09/2020	RP	97679.9800	Confirmed
MRC100014	MRC Industries	Winter Trade Show 2023	25/05/2023	25/05/2023	RP1	717.4	Confirmed
TEST546300002	Testing PR5463	Testing PR5463	20/05/2023	20/05/2023	RP1	119	Confirmed

Below the table is a 'Display Preferences' panel with the following settings:

- Overdue For Invoicing
- Overdue For Project Invoicing
- Bookings To Be Re-Invoiced
- LT hire To Be Invoiced
- Job Reports
- POs to be Reviewed
- Cross rental Review
- Target Margins
- Virtual Carnet
- Orphaned Cross rentals
- DocuSign documents

Location Scope: All, Location. Location: 0 - Main.

Buttons: Open Booking, Refresh DocuSign, Refresh, Reset Timer, Print, Close.

What your customer will see

The client will see an email from DocuSign requesting a signature, they will follow some simple instructions to sign the document. Once they click FINISH, the signed document is returned to you!





RentalPoint Support sent you a document to review and sign.

REVIEW DOCUMENT

RentalPoint Support
[rentp\[redacted\]@gmail.com](mailto:rentp[redacted]@gmail.com)

Support Test,

Please DocuSign MYTEST-00079Q-V001.pdf

Thank You, RentalPoint Support

Request for Signature

 **RentalPoint Support**
Waterloo Business Solutions

Please review the documents below.



CONTINUE

MORE OPTIONS ▾

DocuSign Envelope ID: FC6DEB3F-0256-45D7-8594-B5743E168835

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docuSign.com

QUOTATION

Printed
27-09-19 04:30 pm
BY
RP

JOB: MYTEST00079
STATUS: Quote Only
CUSTOMER: MYTEST
JOBNAME: Gibson Wedding

Installation Instructions


The renter acknowledges that the equipment is NOT covered by insurance and that additional rental charges will be made if the equipment is returned late. All blown globes must be returned, speaker cone damage must be paid for on return, any theft must be reported to the police.

Add your Electronic Signature here

Sign

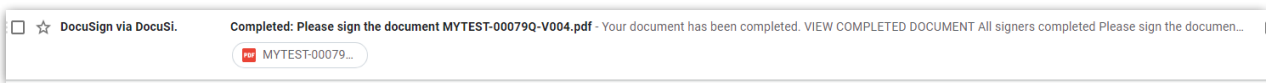


Rental	£ 100.00
Rental Discount	£ 20.00
NYC S	£ 3.60
Total	£ 83.60

Installation Instructions	
<p>The renter acknowledges that the equipment is NOT covered by insurance and that additional rental charges will be made if the equipment is returned late. All blown globes must be returned, speaker cone damage must be paid for on return, any theft must be reported to the police.</p> <p>Add your Electronic Signature here</p> <p>DocuSigned by:  93CF2F7A48ED422...</p>	<p>Rental £ 100.00</p> <p>Rental Discount £ 20.00</p> <p>NYC S £ 3.60</p> <p>Total £ 83.60</p>

Receiving Your Signed Documentation

You'll receive a return email once the document has been signed





You can download and attach the signed document to your booking

- Combined PDF will download a PDF of the signed document and a signature certificate in one PDF
- Separate PDFs will zip two separate PDFs and download one Zip file

This document is now complete. CLOSE

DocuSign Envelope ID: 3E411E4B-1920-4BEB-

Combined PDF 

Separate PDFs 

DEMONSTRATION DOCUMENT ONLY
 PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
 999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docusign.com

QUOTATION


Printed 27-09-19 04:54 pm
 BY RP

JOB: MYTEST00079
 STATUS: Quote Only
 CUSTOMER: MYTEST
 JOBNAME: Gibson Wedding

Prepared For:	Dates:	Job Site:
MYTEST mytest 810 Nipissing Road Milton Ontario L9T 4Z9 Canada Contact: Support Test Telephone: 693 9457 Fax:	Deliver: 01-10-19 01:00 pm Set-Up By: 01-10-19 01:00 pm Show Start: 01-10-19 01:00 pm Show End: 01-10-19 01:00 pm Pick-Up: 01-10-19 01:00 pm	Venue: Room: Address: Contact: Telephone:

Qty	Description	Days Charged	Unit	Discount %	Extended
1	8" Powered Speaker - Yamaha MSR100	1	100.00	0.00	100.00

Installation Instructions

The renter acknowledges that the equipment is NOT covered by insurance and that additional rental charges will be made if the equipment is returned late. All blown globes must be returned, speaker cone damage must be paid for on return, any theft must be reported to the police. Add your Electronic Signature here DocuSigned by:  93CF2F7A48ED422...	Rental £ 100.00 Rental Discount £ 20.00 NYC S £ 3.60 Total £ 83.60
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Certificate Of Completion

Envelope Id: 3E411E4B19204BE8BDEC6EF7CA8389AF Status: Completed
Subject: Please sign the document MYTEST-00079Q-V004.pdf
Source Envelope:
Document Pages: 1 Signatures: 1 Envelope Originator:
Certificate Pages: 4 Initials: 0 RentalPoint Support
AutoNav: Enabled rentp[redacted]@gmail.com
Envelopeld Stamping: Enabled IP Address: 70.31.166.62
Time Zone: (UTC-08:00) Pacific Time (US & Canada)


Record Tracking

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9/27/2019 1:55:02 PM rentp[redacted]@gmail.com

Signer Events

Support Test
[redacted]@gmail.com
Security Level: Email, Account Authentication (None)

Signature


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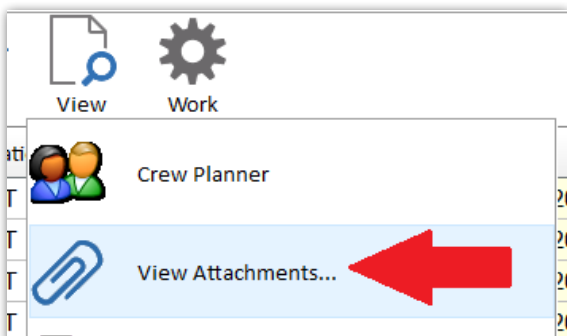
Envelope Delivery

- Attach documents to completion email
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- Send completion emails to embedded signers
- Allow account users to decide if they should send a link or attach a PDF

Deliver self-signed email notifications by:

Link ▼

Highlight the booking, the click on View Attachments



Attach your downloaded file to the booking

