



# eSignatures

Feature-Rich. Elegantly Easy.  
More Affordable at Scale.

The Only Global eSignature Platform Built on 20 Years of  
Leadership in Email Security and Compliance.

Built to Meet Even Your Most Obscure Requirements.  
Handcrafted in California, Served to the World. Since 2000.

## Explore our eSignature Services



Guided eSign  
Experience



eSign Templates  
Automate Faster



Digital Forms  
& Bulk eSign



Privacy, Compliance  
& Legalities



Dynamic API  
Integrations

## JUNGHEINRICH

### ▶▶ Customer Stories

**We've revolutionized how Jungheinrich, a global German logistics company, records agreement with their customers. They've now automated eSignatures with RSign in 31 business units across 22 countries and in 15 languages.**

California  
R&D

70+  
Patents

Billions  
Enabled Transactions

190+  
Countries

[www.rsign.com](http://www.rsign.com)



## Guided eSign Experience

### Blissfully Elegant, Easy and Intuitive

Easy for signers means happy senders. RSign transforms documents and forms into guided, gracefully stylish e-signing experiences. And our expert staff will even transform your signed documents into eSign templates for you — easy onboarding, fast migration from another system.



## eSign Templates Automate Faster

### Drag-and-Drop to Create Template Library

Instantly transform a commonly used form or document into an RSign template. Set up once, re-use it forever. Create logic, build rules, or imagine any other eSign document control and it'll be there, in RSign. Close deals fifty times faster and say goodbye to paper.



## Digital Forms & Bulk eSign

### Power, Efficiency and Agility Combined

Digitize any form with a click and a swipe. Modernize your business process mentality. Paper forms are passé. Web forms need a webmaster. PDF forms are cumbersome to share. Doc forms need field alignment wrestling. With RSign, form fill, sign, and data extract struggles are no more.



## Privacy, Compliance & Legalities

### eSign is Great. Legal eSign Rules.

Security, privacy and compliance are in our DNA. RSign lets you meet the strictest eSign laws and privacy regulations wherever you may be, whether GDPR, HIPAA, E-IDAS, UETA, E-SIGN or whatever you need, we're here for you with the peace of mind that our robust legal eSign audit trail and transaction forensics deliver.



## Dynamic API, Integrations & Automation

### Embed RSign Into Your World

We've built RSign into the most popular apps, messaging programs, document management systems, CRMs, ERPs — any application that lets you print. And we've got a range of APIs that are configurable to address your every imaginable automation need with local experts to work with your teams from design to deployment, every step of the way.

## Why We Are Unique

RSign is the only global eSign platform designed with a (more) affordable, flexible pricing model that adapts to businesses from all industries, sizes and regions, and at the same time is feature-rich, easy to use and friendlier to work with. Built on 20 years of leadership in e-security and e-compliance.



### Breadth of Services

At RSign we're all about innovation. We have grown our platform over two decades alongside our customers' and partners' evolving needs to meet all their requirements and scenarios. Features, rules, API, turnkey and custom integrations; whatever you need, you can count on us.



### Simplicity

We believe technology is not just about what it can do, but how it feels. That is why we have designed and built RSign to be robust, yet simple and intuitive for all users, whether senders, signers, process managers or API owners. RSign is blissfully elegant.



### Legal Proof®

Compliance and security are in our DNA. Each eSign transaction returns a legally-binding, court-admissible, cryptographically sealed signing certificate that is locked to the content and audit trail. RSign means Legal Proof® eSign evidence.



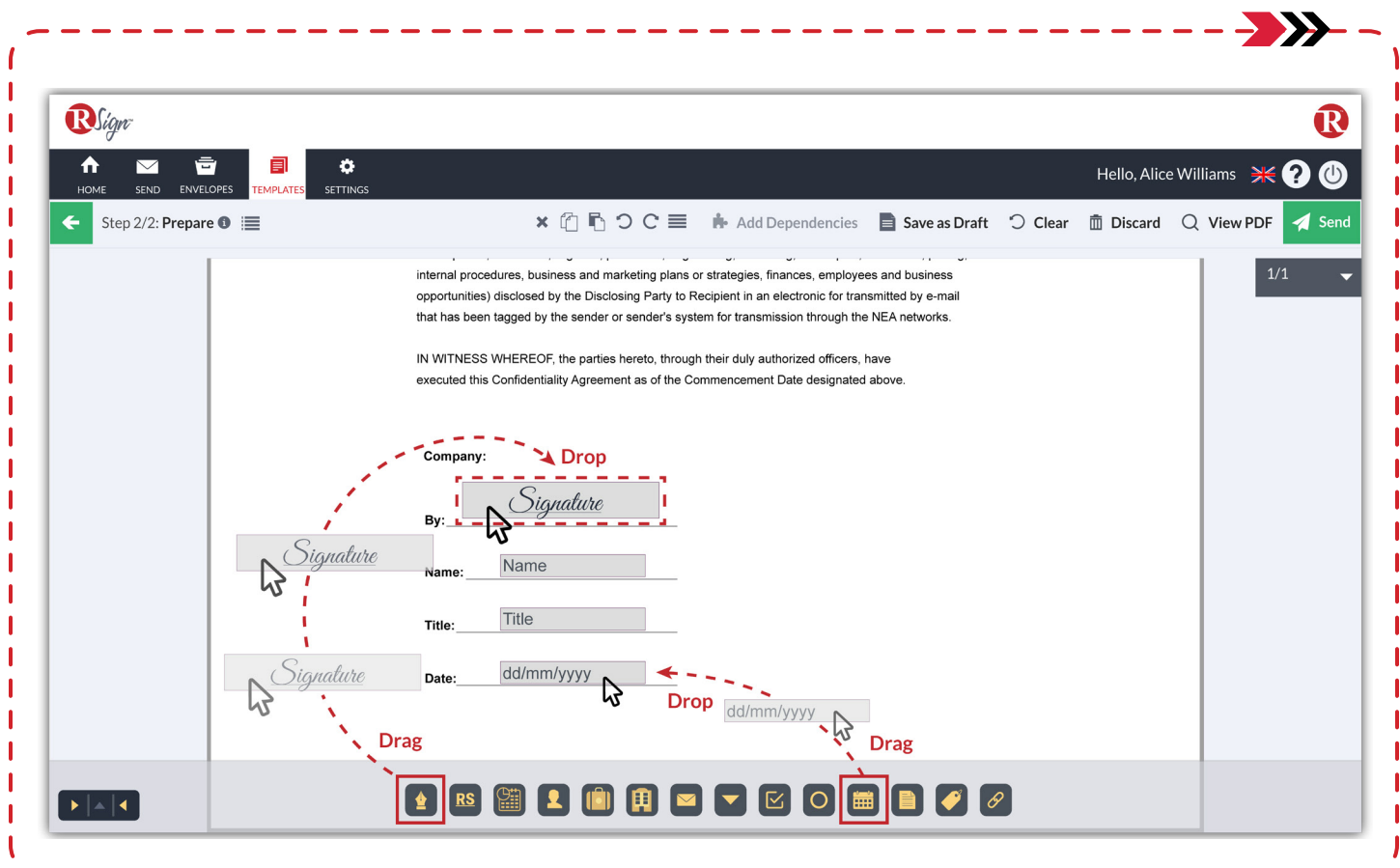
### Identity, Authentication

RSign is built to meet the highest security standards worldwide, providing end-to-end and in-transit encryption, multi-factor authentication and more. All aspects of the RSign eSignature record can be later authenticated: who signed what, with whom and when.

Thank you, to the more than **25 million people** the world over, who have put their trust in our team and technology, **since 2000.**



## Drag-And-Drop Control Fields



Easy for signers means happy senders. RSign transforms documents and forms into guided, gracefully stylish eSigning experiences. And our expert staff will even transform your signed documents into eSign templates for you — easy onboarding, fast migration from another system.

## Conditional Fields

The screenshots show the RSign interface for a document titled "North End Associates". The document contains sections for "Tenant's personal information", "Tenant's obligations", and "Landlord's obligations". The "Marital" dropdown menu is open, showing options for "Single", "Married", and "Divorced". The "Spouse Name" field is visible only when "Married" is selected.

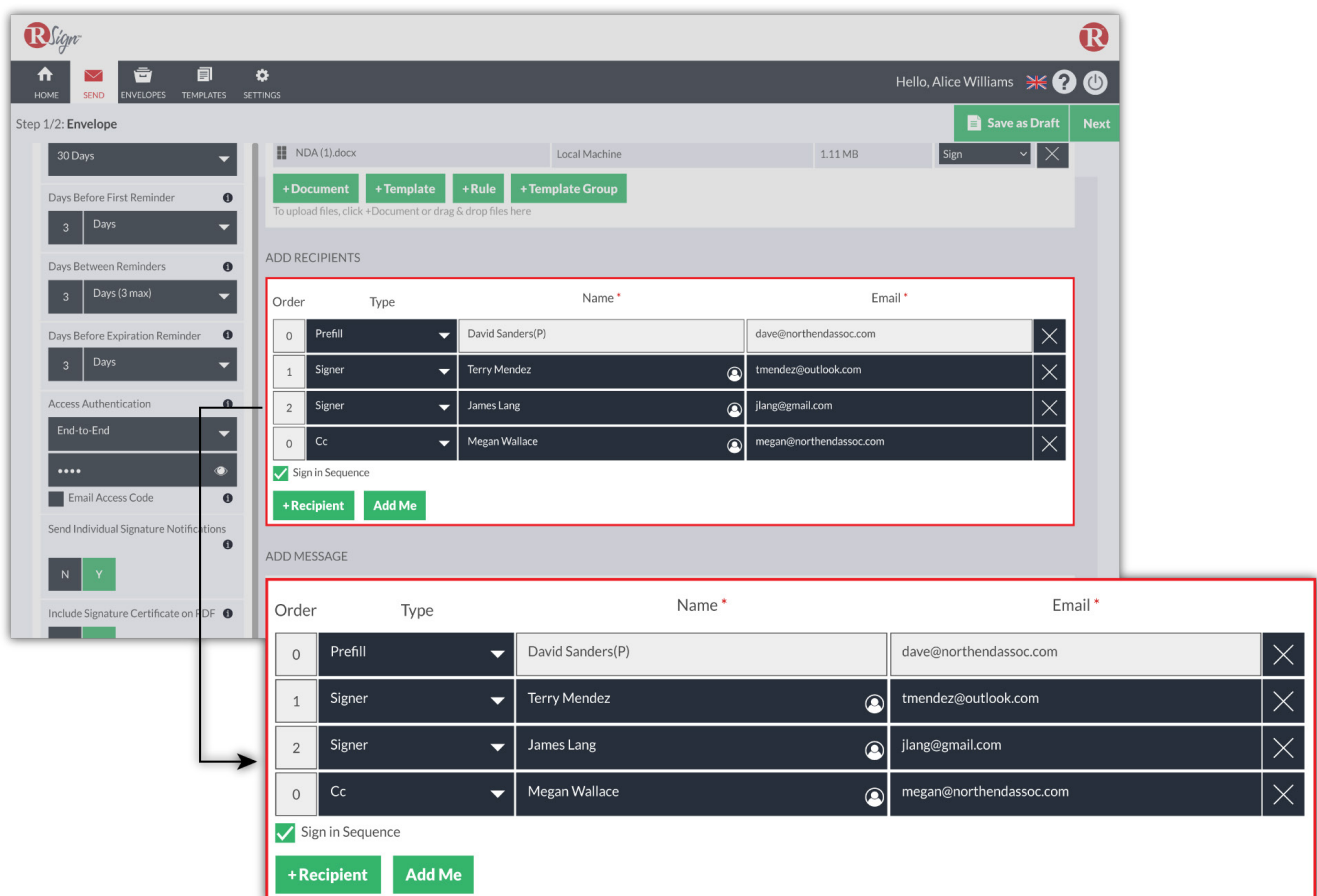
**Top Screenshot:** The "Marital" dropdown menu is open, showing options for "Single", "Married", and "Divorced". A callout box states: "Note how the signer sees the dependencies based on which radio they selected".

**Bottom Screenshot:** The "Married" radio button is selected, and the "Spouse Name" field is visible. A callout box states: "Now the field 'Spouse Name' only appears when the option 'Married' is selected".

Add logic to the signing process so that if an action is performed on one fillable control field, additional actions will be required on others. Conditional fields can help to streamline and personalize the eSignature process by only presenting the relevant information and options to the signer.



### Custom eSignature Workflows



The screenshot displays the RSign interface for creating a custom eSignature workflow. The workflow is titled "Step 1/2: Envelope" and is for a document named "NDA (1).docx" (1.11 MB) from a "Local Machine". The interface includes a sidebar with settings for reminders, authentication, and notifications. The main area shows a table of recipients with their roles, names, and email addresses. The workflow is configured to sign in sequence.

Order	Type	Name *	Email *
0	Prefill	David Sanders(P)	dave@northendassoc.com
1	Signer	Terry Mendez	tmendez@outlook.com
2	Signer	James Lang	jlang@gmail.com
0	Cc	Megan Wallace	megan@northendassoc.com

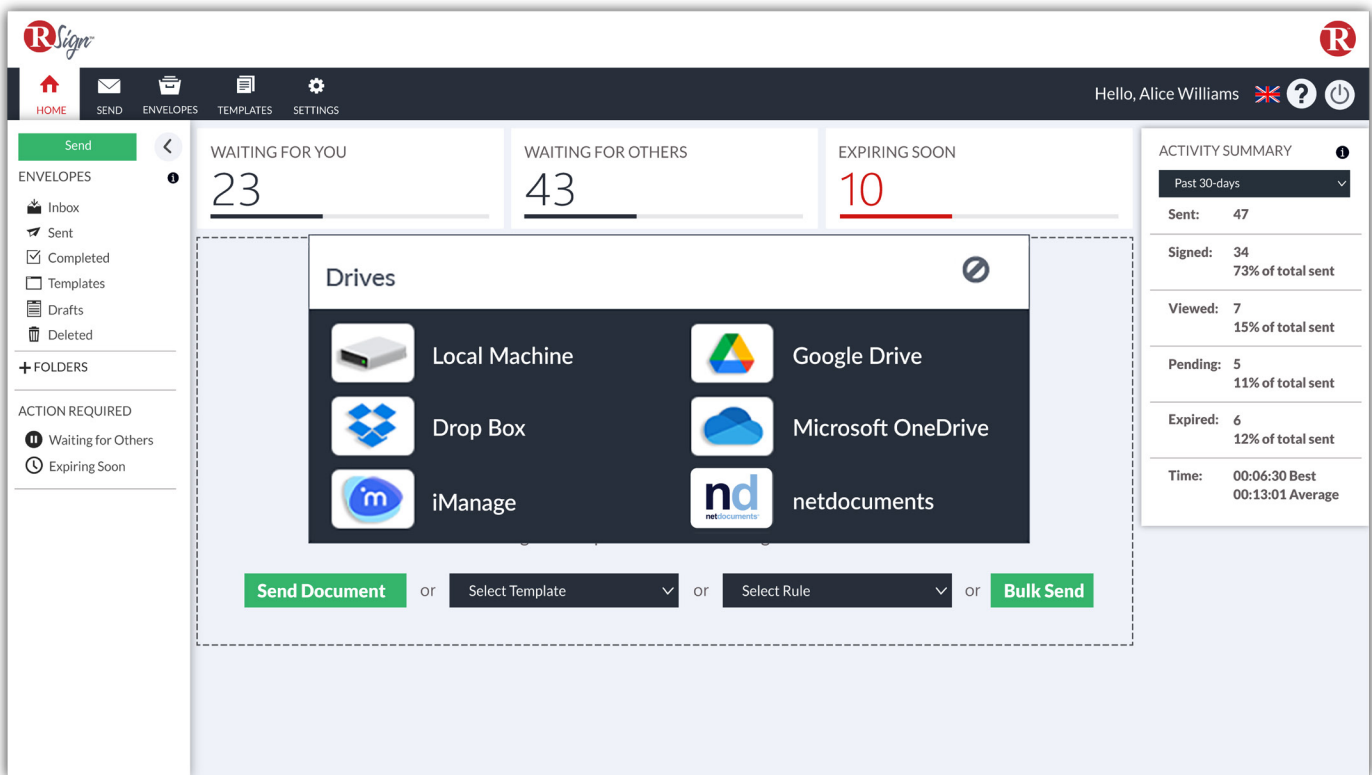
Sign in Sequence

+ Recipient Add Me

Custom eSignature workflows allow you to create tailored processes for collecting electronic signatures on documents. These workflows can include custom reminders and notifications, specific roles for signers (signer, cc, prefill), a defined signing order, and various signer authentication options for added security. You can use these custom eSignature workflows for one-time signing or save them as templates to use and share across your organization.

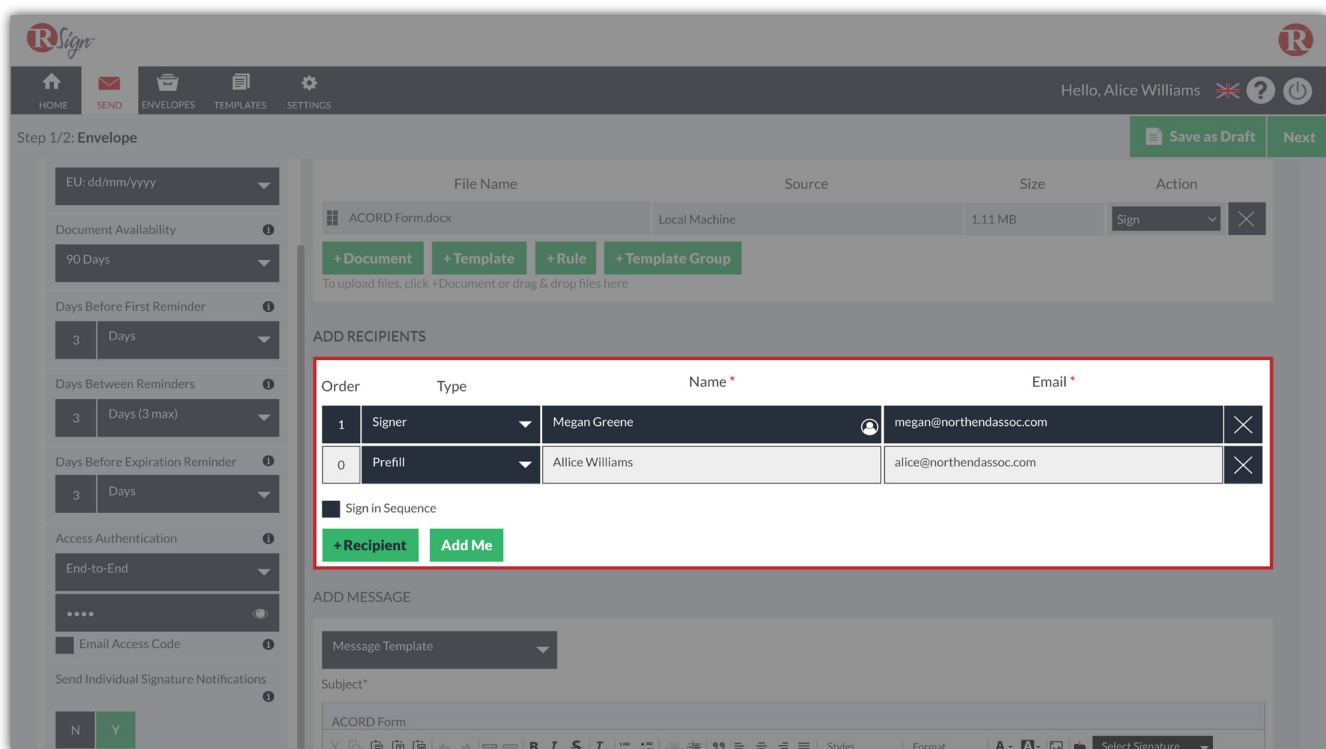
## Cloud Storage

Google Drive, OneDrive, Dropbox, iManage, NetDocuments



RSign allows senders to easily add files to electronic signature envelopes directly from their preferred storage drives such as Google Drive, Microsoft OneDrive, Dropbox, iManage, and NetDocuments. This not only saves time and improves the sender experience, but also helps to reduce compliance risks by removing the need to download files containing client data to local devices.

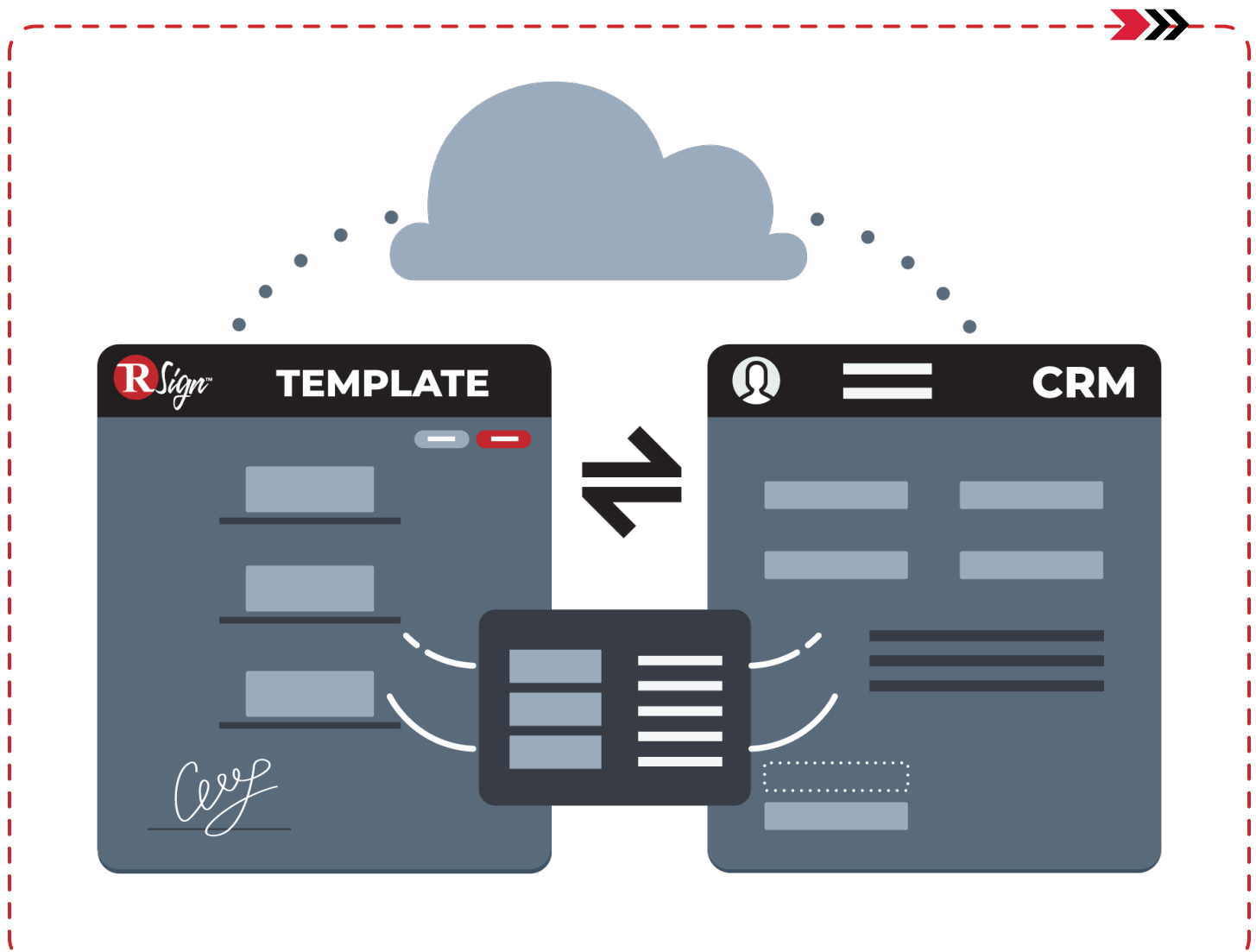
### Easy Prefill

Order	Type	Name *	Email *
1	Signer	Megan Greene	megan@northendassoc.com
0	Prefill	Alice Williams	alice@northendassoc.com

Fill out portions of a document before sending it for eSignature to save valuable time for your clients, offer an enhanced signer experience, and streamline the process. If you are sending via integrated platforms, this can even be done automatically via API.

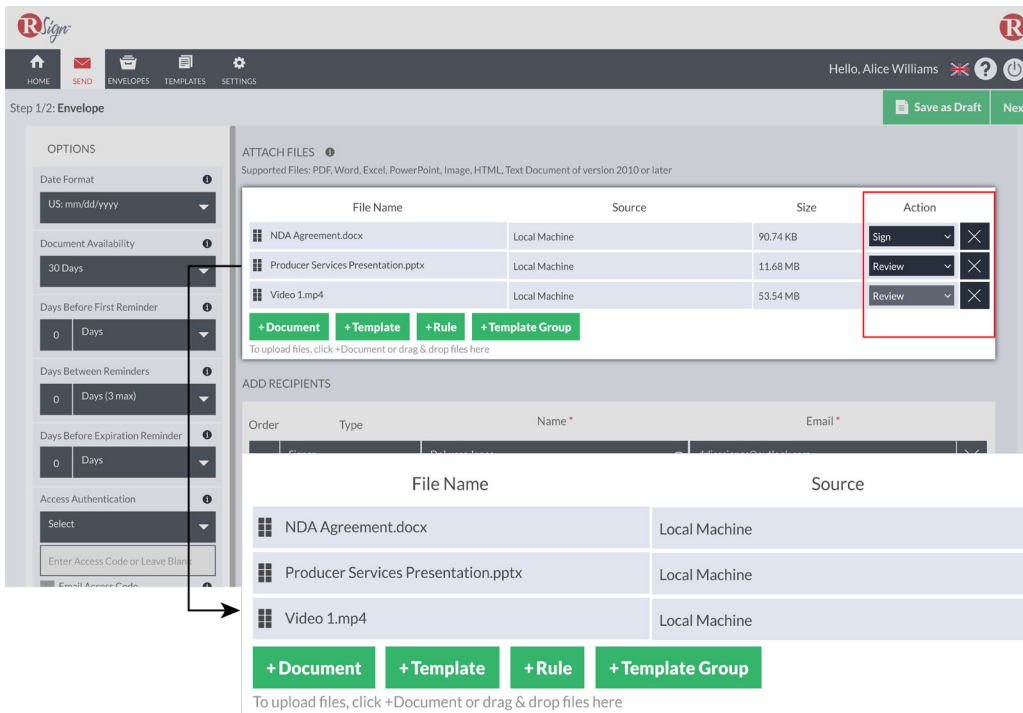
## Backfill Into CRM



RSign backfill capabilities allow you to map fields from your eSign templates to your CRM data model to automate data import and streamline your business processes. This empowers you to, for example, use RSign forms to update client records in Salesforce or other CRM platforms.



### Send Multimedia Files for Signoff



Step 1/2: Envelope

Options:

- Date Format: US: mm/dd/yyyy
- Document Availability: 30 Days
- Days Before First Reminder: 0 Days
- Days Between Reminders: 0 Days (3 max)
- Days Before Expiration Reminder: 0 Days
- Access Authentication: Select

ATTACH FILES

Supported Files: PDF, Word, Excel, PowerPoint, Image, HTML, Text Document of version 2010 or later

File Name	Source	Size	Action
NDA Agreement.docx	Local Machine	90.74 KB	Sign
Producer Services Presentation.pptx	Local Machine	11.68 MB	Review
Video 1.mp4	Local Machine	53.54 MB	Review

+ Document + Template + Rule + Template Group

To upload files, click +Document or drag & drop files here

ADD RECIPIENTS

Order	Type	Name *	Email *
1	Person	Alice Williams	alice.williams@example.com

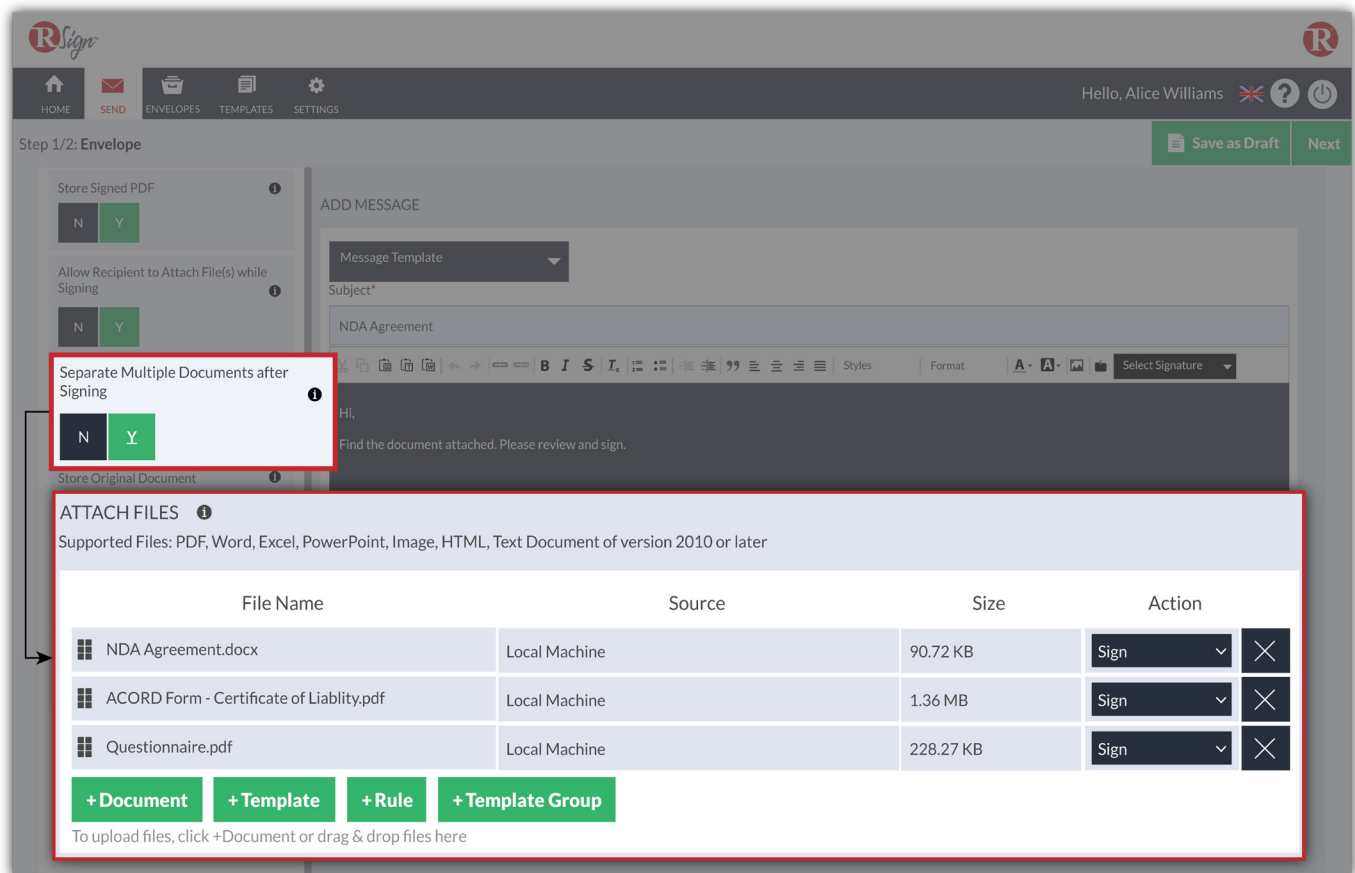
File Name	Source	Size	Action
NDA Agreement.docx	Local Machine	90.74 KB	Sign
Producer Services Presentation.pptx	Local Machine	11.68 MB	Review
Video 1.mp4	Local Machine	53.54 MB	Review

+ Document + Template + Rule + Template Group

To upload files, click +Document or drag & drop files here

Send Powerpoint decks, audio files, images, videos and more for signoff to digitize approval processes in a compliant, auditable and secure manner, improving efficiency and communication between parties.

## Multi-Document Envelopes



Step 1/2: Envelope

Save as Draft Next

Store Signed PDF

N Y

Allow Recipient to Attach File(s) while Signing

N Y

Separate Multiple Documents after Signing

N Y

Store Original Document

ATTACH FILES

Supported Files: PDF, Word, Excel, PowerPoint, Image, HTML, Text Document of version 2010 or later

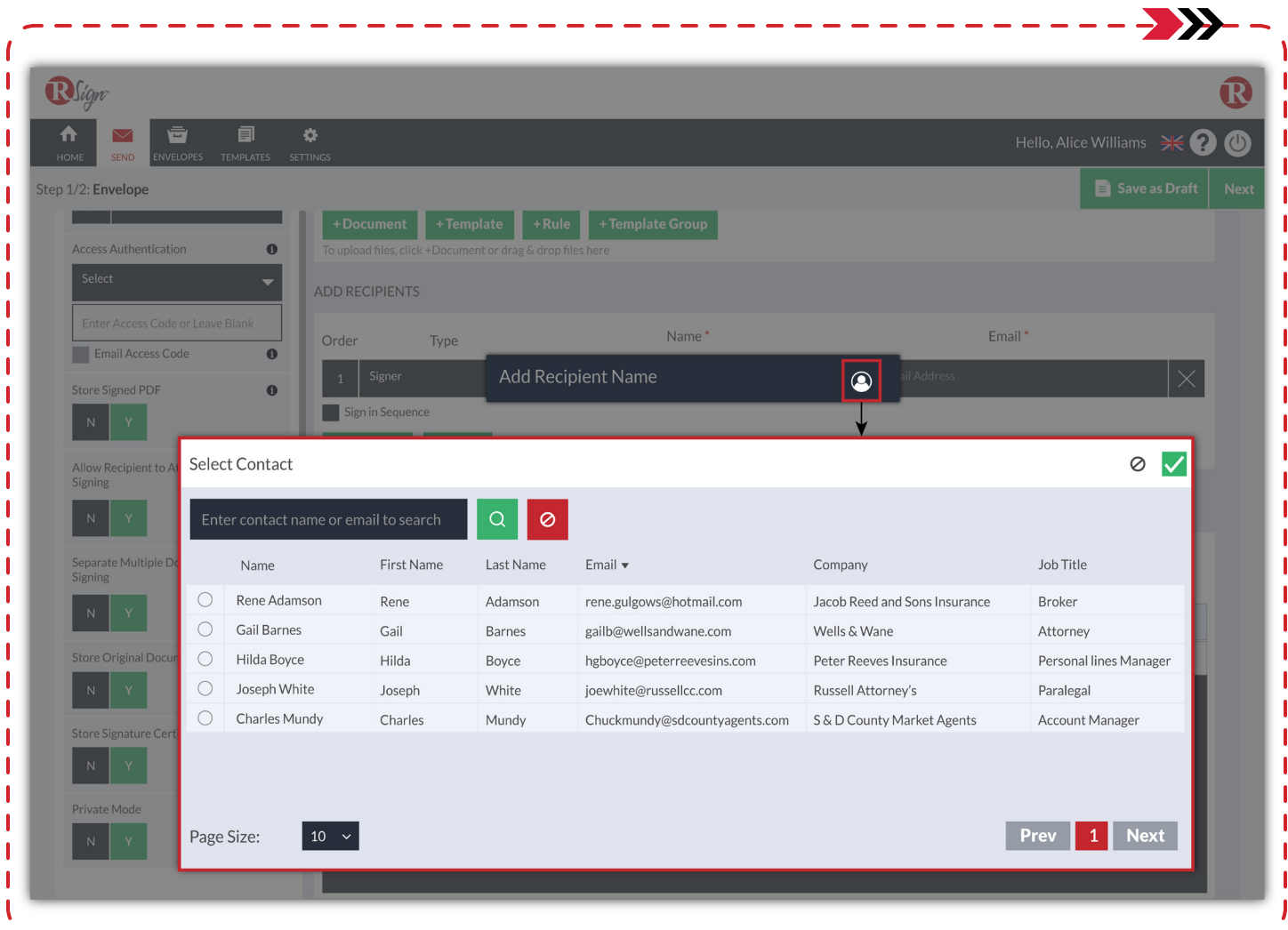
File Name	Source	Size	Action
NDA Agreement.docx	Local Machine	90.72 KB	Sign X
ACORD Form - Certificate of Liability.pdf	Local Machine	1.36 MB	Sign X
Questionnaire.pdf	Local Machine	228.27 KB	Sign X

+ Document + Template + Rule + Template Group

To upload files, click +Document or drag & drop files here

RSign empowers senders to append multiple documents to a single eSignature envelope for convenience and enhanced signer experience. Senders have the option to return the signed contract in a single package or to save each file separately as an individual PDF with its own eSign certificate.

## RContacts Address Book



Step 1/2: Envelope

ADD RECIPIENTS

Order	Type	Name *	Email *
1	Signer	Add Recipient Name	

Select Contact

Enter contact name or email to search

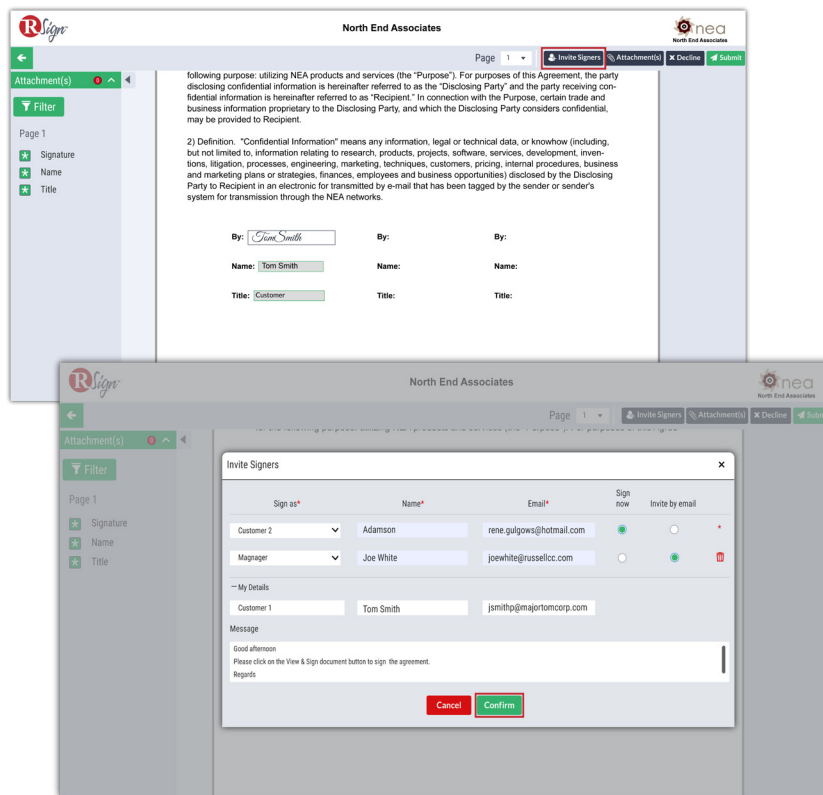
	Name	First Name	Last Name	Email	Company	Job Title
<input type="radio"/>	Rene Adamson	Rene	Adamson	rene.gulgows@hotmail.com	Jacob Reed and Sons Insurance	Broker
<input type="radio"/>	Gail Barnes	Gail	Barnes	gailb@wellsandwane.com	Wells & Wane	Attorney
<input type="radio"/>	Hilda Boyce	Hilda	Boyce	hgboyce@peterreevesins.com	Peter Reeves Insurance	Personal lines Manager
<input type="radio"/>	Joseph White	Joseph	White	joewhite@russellcc.com	Russell Attorney's	Paralegal
<input type="radio"/>	Charles Mundy	Charles	Mundy	Chuckmundy@sdcountyagents.com	S & D County Market Agents	Account Manager

Page Size: 10

Prev 1 Next

RSign makes it easy to import your contact library and even access your CRM contacts via integration to streamline the envelope preparation process. Simply click on the RContacts button, select your recipients and send your document for eSignature.

## RForms™ Click-Build E-Forms & Multi-signer Workflows at Static Links



The screenshot displays the RSign interface for a document titled "North End Associates". The document content includes a purpose statement and a definition of "Confidential Information". Below the text, there are fields for "By:" and "Name:" with a dropdown menu set to "Tom Smith" and a title field set to "Customer". An "Invite Signers" dialog box is open, showing a table with columns for "Sign as\*", "Name\*", "Email\*", "Sign now", and "Invite by email". The table lists two signers: "Customer 2" (Adamson, rene.guligowski@hotmail.com) and "Manager" (Joe White, joewhite@russellcc.com). Below the table, there is a section for "My Details" with fields for "Customer 1" (Tom Smith) and "Email" (jsmith@majorcorp.com). A "Message" field contains the text "Good afternoon. Please click on the View & Sign document button to sign the agreement. Regards". The dialog box has "Cancel" and "Confirm" buttons at the bottom.

RForms™ are a powerful and convenient feature of the RSign platform that allow to easily share documents with anyone, anywhere, for self-service filling out and signing, and it even supports complex eSign workflows with multiple signers. It's the most convenient, no-code way to create and distribute web forms for on-demand data capture.

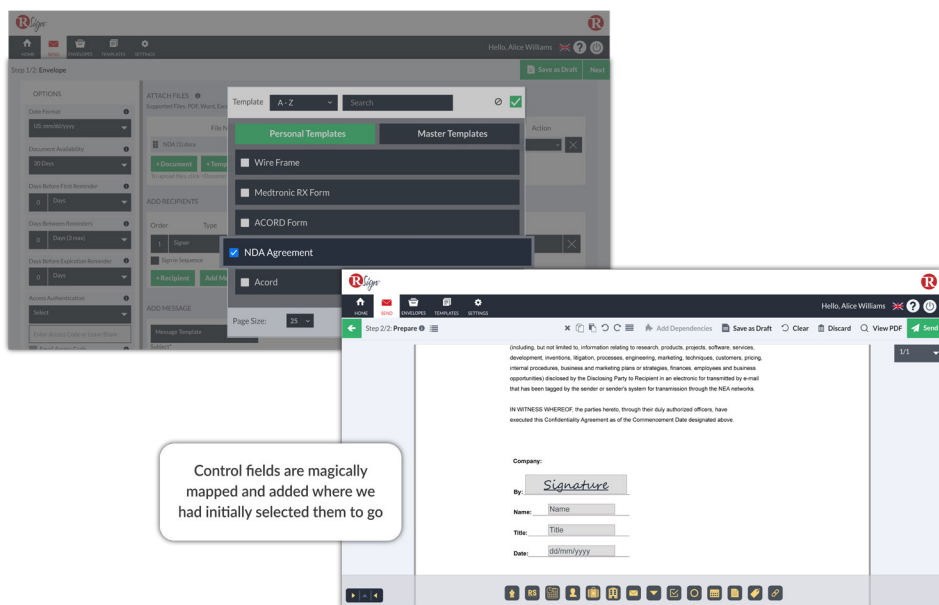
Creating an RForm is as simple as selecting from your library of shared eSign Templates and obtaining a static link with the click of a button. You can then share that link with your intended recipients via email, on social media, on a website, access it from your CRM via API, or any other method.

When someone clicks on a Static Link, they can view and sign the document without the need to log in or create an account.

Use RForms Static Links to share sales contracts, purchase orders, new customer forms, real estate contracts, employee agreements, NDAs, and more.



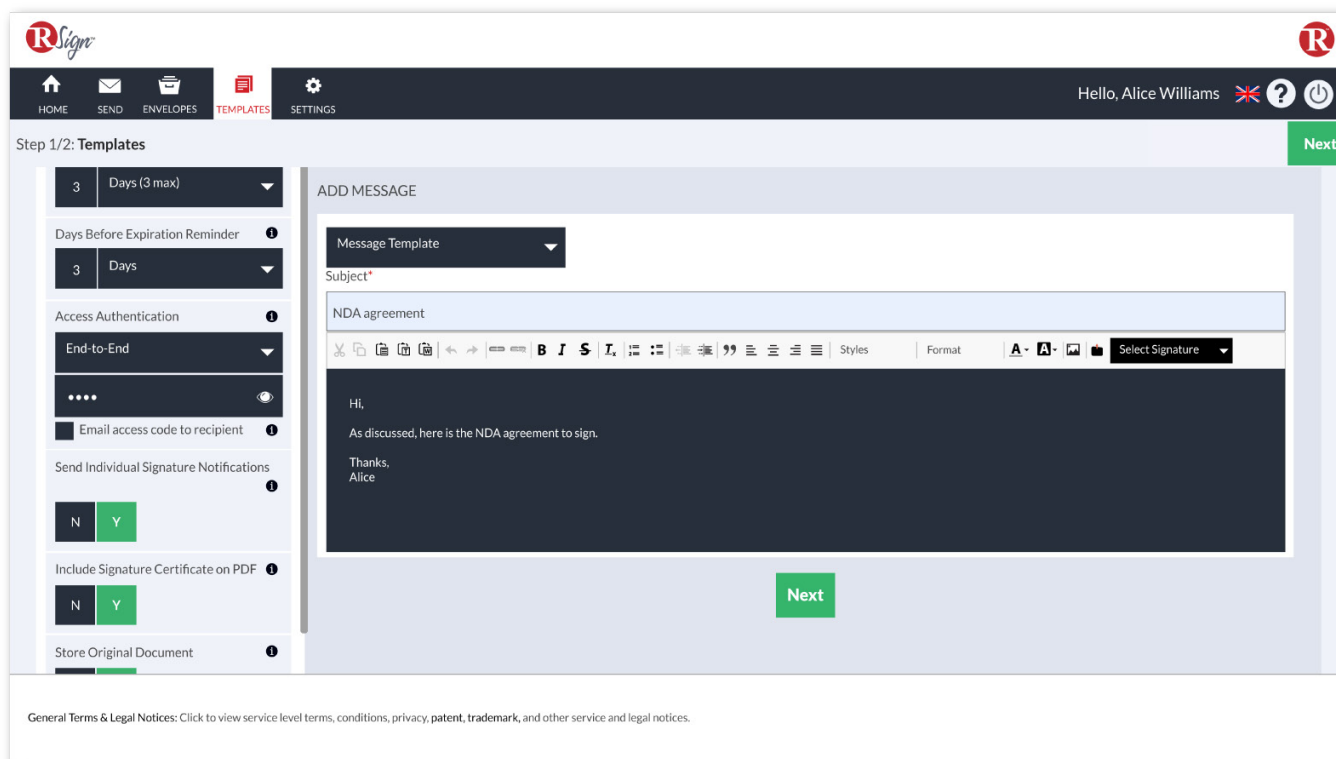
### Templates & Rules



RSign Templates enable you to create electronic signature templates that can be reused to quickly generate new documents ready for review and signature.

RSign Rules are a specific type of template where the fillable fields are static, but the underlying document can be changed, which is helpful for managing documents that have a similar layout but varying content, such as ACORD forms or translations. With RSign Templates and Rules, you can save time and streamline your processes by setting up a document once and customizing the signing workflow with signing order, reminders, and notifications. The template and rule can then be shared within your team or organization for ongoing use.

### Email Templates



The screenshot shows the 'ADD MESSAGE' interface in the RSign application. The interface is divided into a left sidebar with configuration options and a main content area for the message template.

**Left Sidebar (Configuration):**

- Step 1/2: Templates** (with a 'Next' button)
- 3 Days (3 max)** (dropdown menu)
- Days Before Expiration Reminder** (dropdown menu)
- 3 Days** (dropdown menu)
- Access Authentication** (dropdown menu)
- End-to-End** (dropdown menu)
- ...** (dropdown menu)
- Email access code to recipient** (checkbox)
- Send Individual Signature Notifications** (checkbox)
- N Y** (radio buttons)
- Include Signature Certificate on PDF** (checkbox)
- N Y** (radio buttons)
- Store Original Document** (checkbox)

**Main Content Area (ADD MESSAGE):**

- Message Template** (dropdown menu)
- Subject\*** (text input field)
- NDA agreement** (text input field)
- Rich Text Editor:** Includes a toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, decrease indent, increase indent, text color, background color, and a 'Select Signature' dropdown. The text area contains:
 

Hi,

As discussed, here is the NDA agreement to sign.

Thanks,  
Alice
- Next** (green button)

**Footer:** General Terms & Legal Notices: Click to view service level terms, conditions, privacy, patent, trademark, and other service and legal notices.

Create and save custom messages to include with your eSign request. Simply add your subject line and body, save and reuse.

## Bulk Send

The screenshot displays the RSign Bulk Send interface. The top navigation bar includes Home, Send, Envelopes, Templates, and Settings. The user is logged in as Alice Williams. The main area shows the 'Back to Send Document' button and the 'Next' button. Below this is the 'UPLOAD' section with a 'Bulk Upload CSV' button and 'Browse' and 'Upload' links. A red arrow points to the 'Bulk Upload CSV' button. Below the upload section is a table with columns A through H, containing data for templates, roles, and recipients. A second window is overlaid on the bottom right, showing the 'TEMPLATE DETAILS' table.

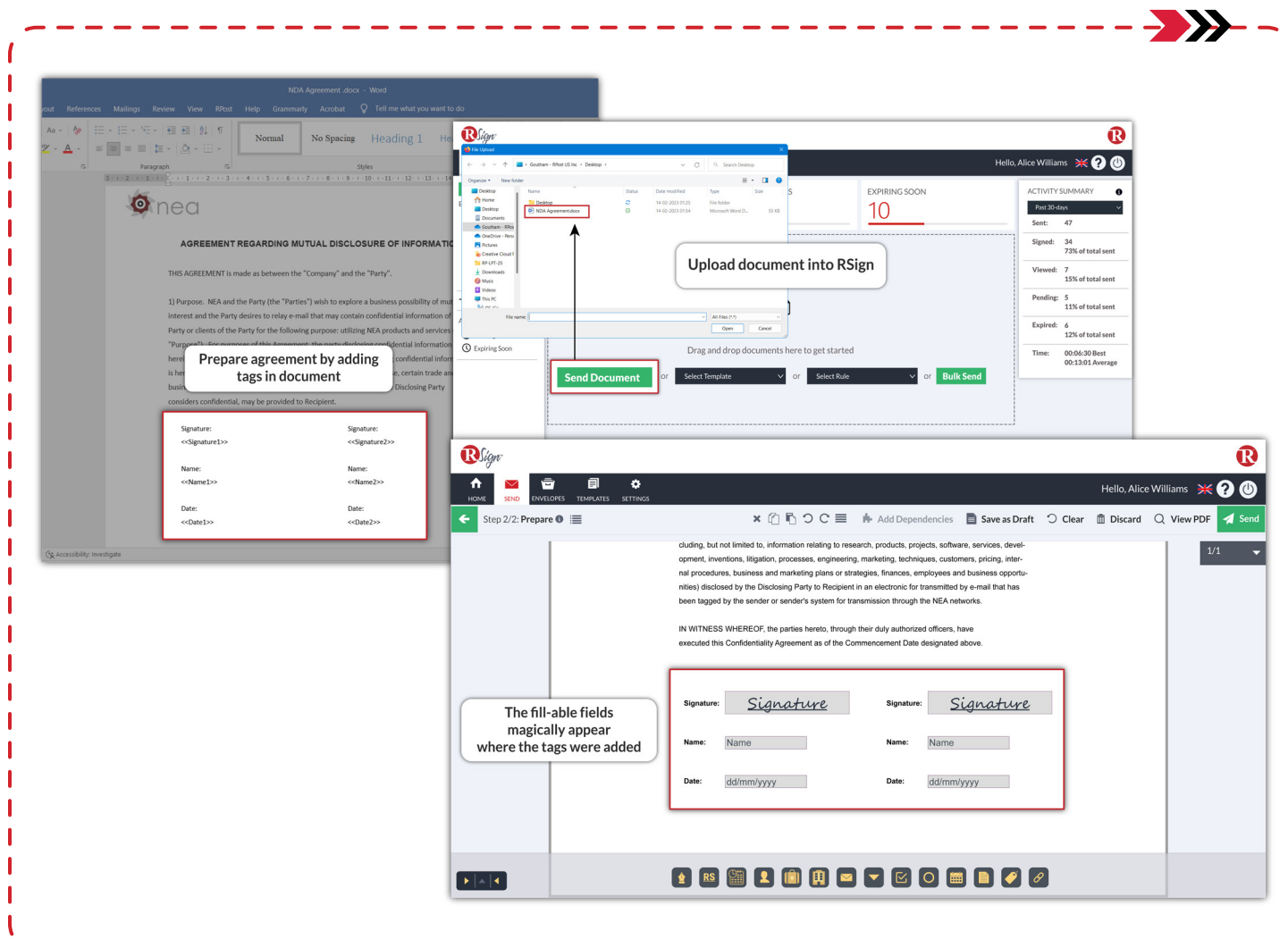
	A	B	C	D	E	F	G	H
1	Transid	Template	Role Name	Role Type	Recipient Name	Recipient Email	Subject	
2	1	49940	Customer	Signer	David Murray	<a href="mailto:David@northendassoc.com">David@northendassoc.com</a>	<<FirstName>>, this information is important	
3	2	49940	Customer	Signer	Tom Smith	<a href="mailto:Tomsmith@mail.com">Tomsmith@mail.com</a>	<<FirstName>>, please read	
4	3	49939	New Hire	Signer	Jane Dow	<a href="mailto:Janedoe@mail.com">Janedoe@mail.com</a>		
5	4	49939	New Hire	Signer	Mary Jones	<a href="mailto:Maryjones@mail.com">Maryjones@mail.com</a>	Please read and take action	
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								

Template Group	Template Code	Role Name	Role Type	Recipient Name	Recipient Email	Subject
1	49940	Customer	Signer	David Murray	David@northendassoc.com	David, this information is important
2	49940	Customer	Signer	Tom Smith	Tomsmith@mail.com	Tom, please read
3	49939	New Hire	Signer	Jane Dow	Janedoe@mail.com	
4	49939	New Hire	Signer	Mary Jones	Maryjones@mail.com	Please read and take action

RSign® Bulk Send allows you to send large quantities of eSign requests efficiently. Simply upload a CSV file with your recipients and select your desired template, and you can share multiple requests with multiple recipients at once. Use RSign Bulk Send to share sales contracts, purchase orders, new customer forms, real estate contracts, employee agreements, NDAs and more.

## RSign Word Tags



Prepare agreement by adding tags in document

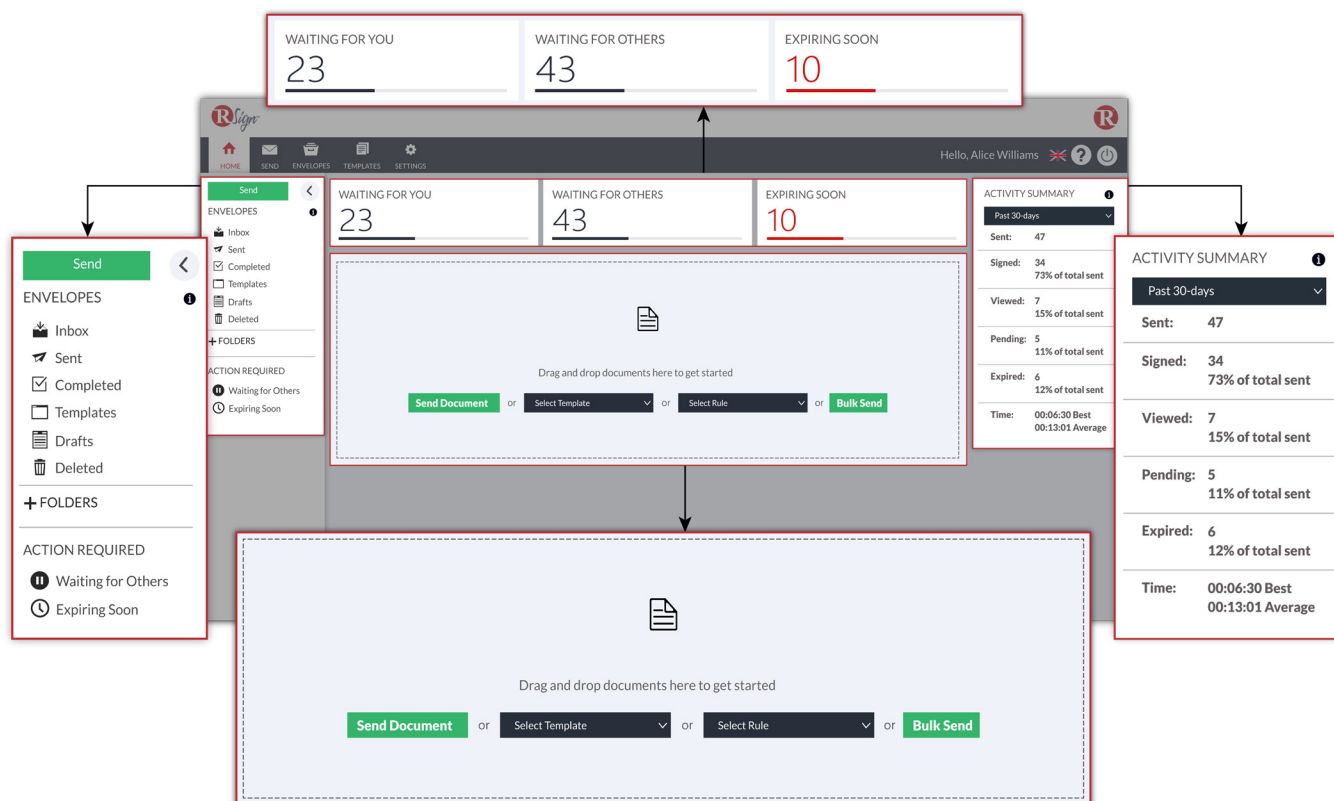
Upload document into RSign

The fill-able fields magically appear where the tags were added

RSign Tags enable you to streamline the process of preparing documents for electronic signatures, significantly reducing the need for manual work. You have the option to manually add tags such as <<Signature>>, <<Initials>>, and more to your documents, or configure your document generation system to automatically insert them in designated areas for input fields. RSign will recognize these tags and replace them with the appropriate input fields. Afterward, you can make any necessary adjustments and proceed with sending the documents.



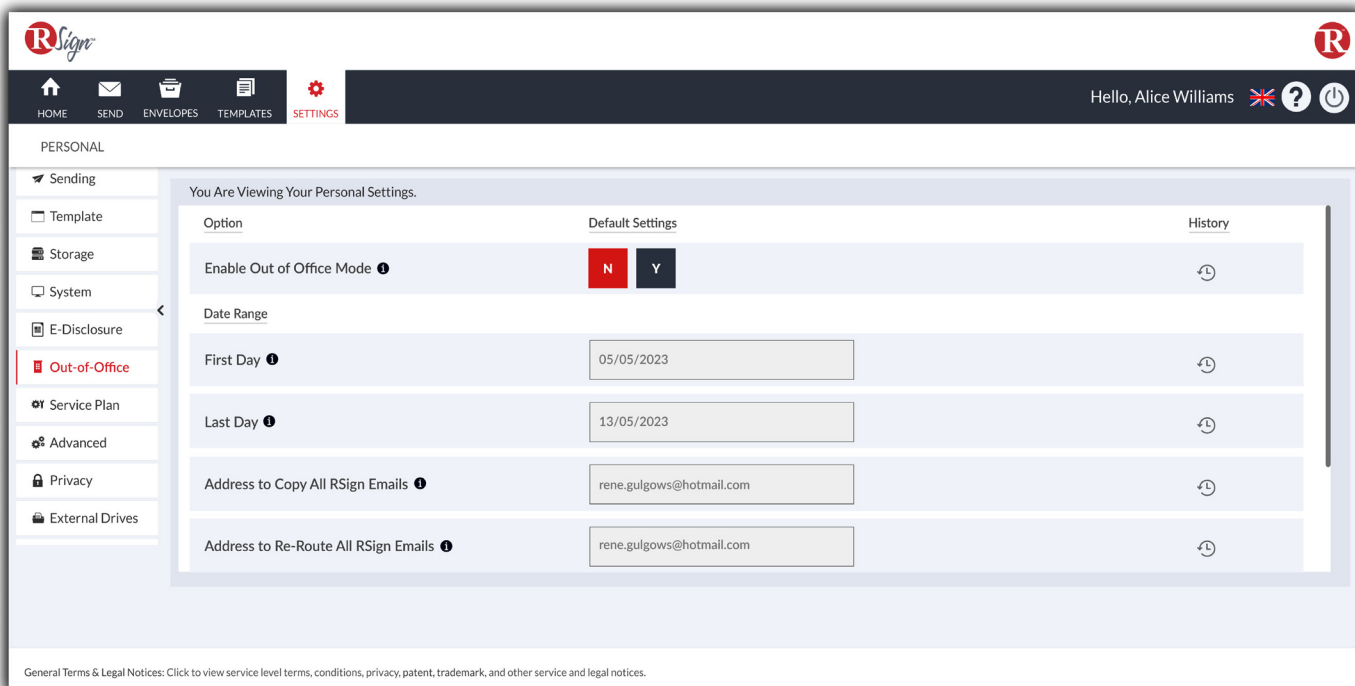
### Personalized Home Dashboard



The RSign Home Dashboard is the one-stop-shop for all your eSign activities and information. It offers a quick snapshot of your most relevant activities and metrics within the RSign platform with real-time envelope tracking for complete visibility over your eSign requests, notifications of upcoming signing events, and more.

With just a few clicks, you can send eSign requests by dragging and dropping your documents or selecting from your list of shared templates.

## Out-of-Office Mode



PERSONAL

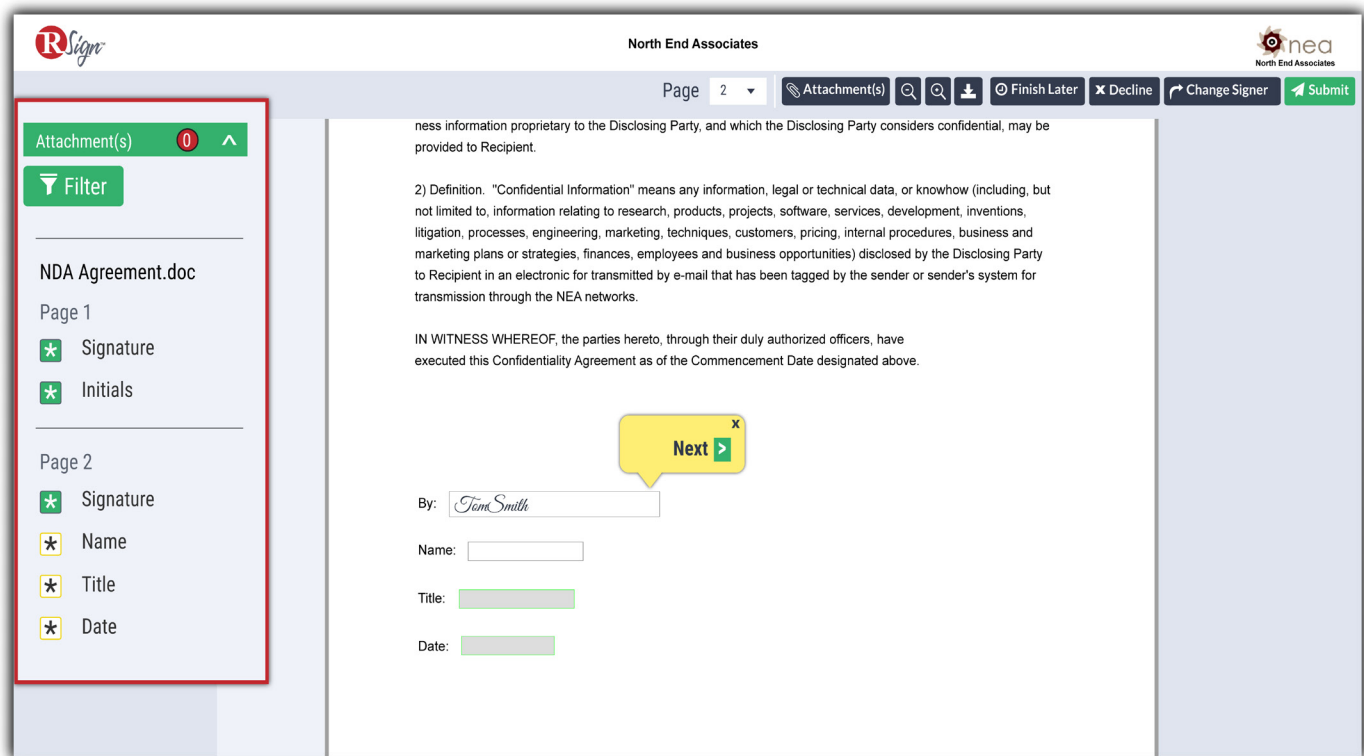
You Are Viewing Your Personal Settings.

Option	Default Settings	History
Enable Out of Office Mode ⓘ	<span>N</span> <span>Y</span>	
Date Range		
First Day ⓘ	05/05/2023	
Last Day ⓘ	13/05/2023	
Address to Copy All RSign Emails ⓘ	rene.gulgows@hotmail.com	
Address to Re-Route All RSign Emails ⓘ	rene.gulgows@hotmail.com	

General Terms & Legal Notices: Click to view service level terms, conditions, privacy, patent, trademark, and other service and legal notices.

The out-of-office mode allows senders to have a co-worker or a manager sign their documents if they are out of the office for a period of time. This way, senders can make sure all their eSign-related activities progress in their absence. Simply set first day, last day, address to copy all RSign emails, and address to re-route all RSign emails.

## Guided eSign Experience



North End Associates

Page 2

Attachment(s) 0

Filter

NDA Agreement.doc

Page 1

- Signature
- Initials

Page 2

- Signature
- Name
- Title
- Date

ness information proprietary to the Disclosing Party, and which the Disclosing Party considers confidential, may be provided to Recipient.

2) Definition. "Confidential Information" means any information, legal or technical data, or knowhow (including, but not limited to, information relating to research, products, projects, software, services, development, inventions, litigation, processes, engineering, marketing, techniques, customers, pricing, internal procedures, business and marketing plans or strategies, finances, employees and business opportunities) disclosed by the Disclosing Party to Recipient in an electronic for transmitted by e-mail that has been tagged by the sender or sender's system for transmission through the NEA networks.

IN WITNESS WHEREOF, the parties hereto, through their duly authorized officers, have executed this Confidentiality Agreement as of the Commencement Date designated above.

By:

Name:

Title:

Date:

Next >

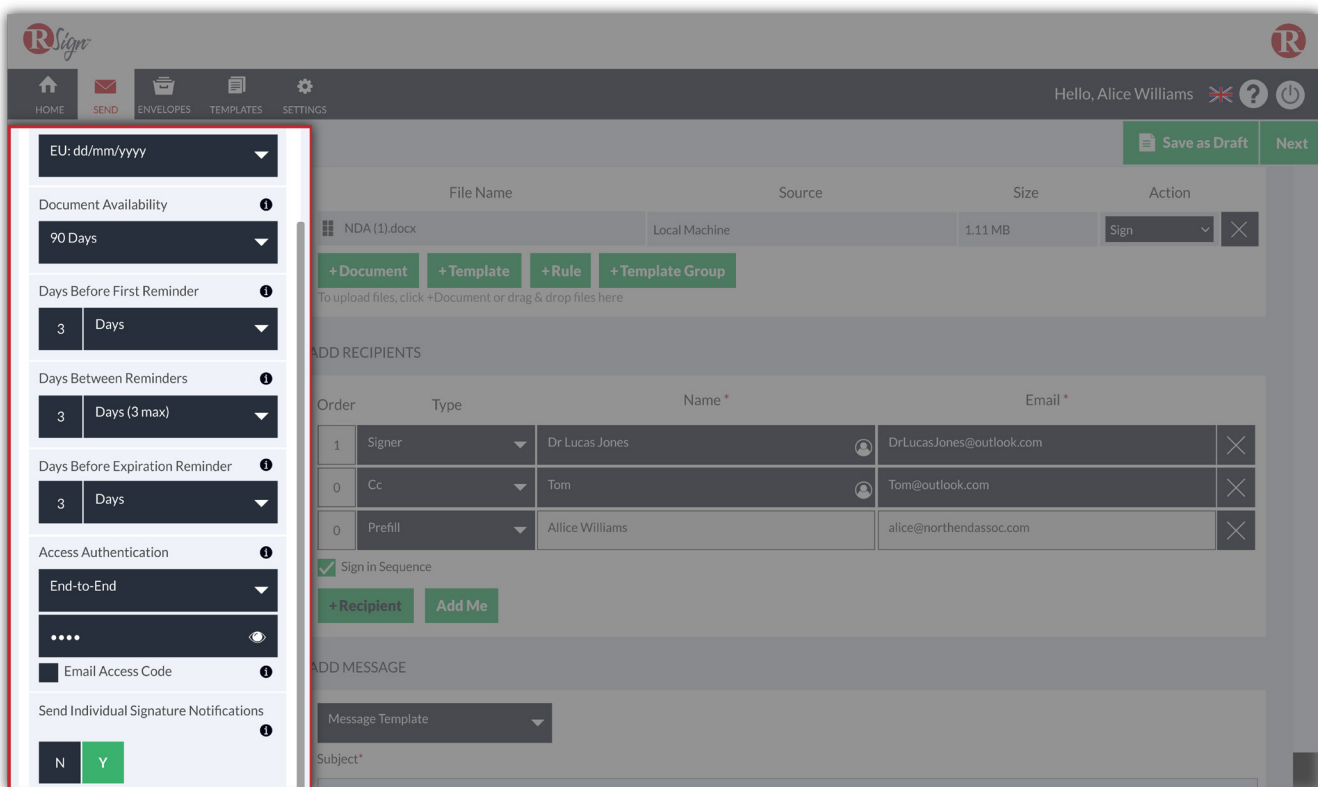
Finish Later Decline Change Signer Submit

Our elegantly-easy, guided signing process helps the signer navigate through the document and ensures a 100% error free contract.

With RSign, you can allow signers to attach files, save for later, delegate signing to someone else, or decline to sign.

Once completed, both sender and signer receive the signed completed document, including the industry's most robust forensic evidentiary eSign record.

## Reminders and Notifications



The screenshot shows the RSign web interface. On the left, a settings panel is open, highlighting the 'Reminders and Notifications' section. The main area shows a document workflow for 'NDA (1).docx' with three recipients: Dr. Lucas Jones, Tom, and Alice Williams.

**Reminders and Notifications Settings:**

- EU: dd/mm/yyyy
- Document Availability: 90 Days
- Days Before First Reminder: 3 Days
- Days Between Reminders: 3 Days (3 max)
- Days Before Expiration Reminder: 3 Days
- Access Authentication: End-to-End
- Email Access Code: [ ]
- Send Individual Signature Notifications: N Y

**Main Workflow Area:**

File Name: NDA (1).docx | Source: Local Machine | Size: 1.11 MB | Action: Sign

Buttons: + Document, + Template, + Rule, + Template Group

ADD RECIPIENTS

Order	Type	Name *	Email *
1	Signer	Dr Lucas Jones	DrLucasJones@outlook.com
0	Cc	Tom	Tom@outlook.com
0	Prefill	Alice Williams	alice@northendassoc.com

Buttons: + Recipient, Add Me

ADD MESSAGE

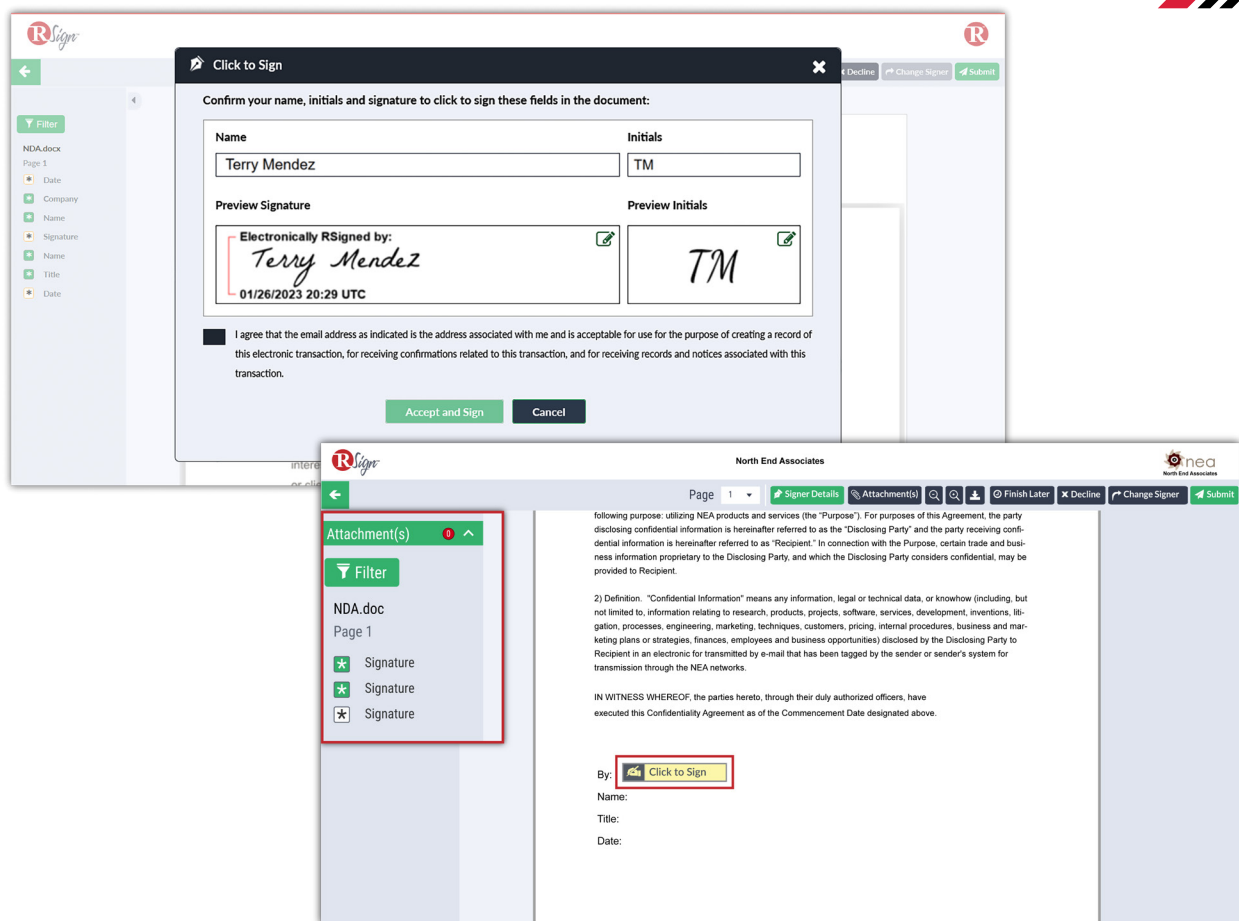
Message Template: [ ]

Subject: [ ]

With RSign, you automatically deliver gentle nudges to your signers via email or SMS to remind them of pending actions on their end. This saves time and money for you and your clients and speeds up business, reducing the chances of documents expiring and having to start your workflows all over again.



## Click-to-Sign & Auto-Populate Repeated Fields

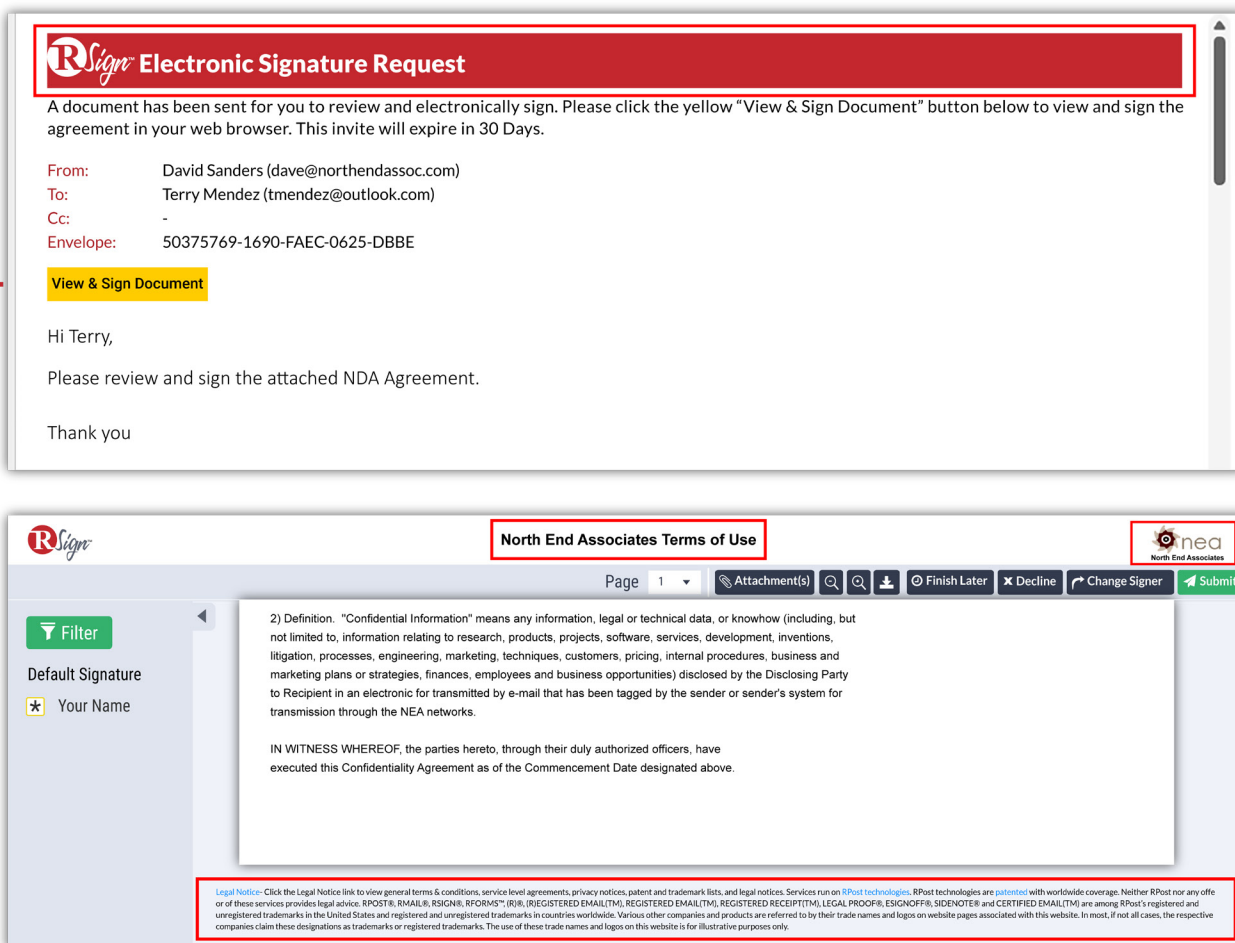


Ideal for documents that require multiple signatures and/or initials throughout the document.

This feature captures the signature, initials, and name at the beginning of the signing process and applies those values with a simple mouse click, reducing time and expediting the signing process.

With Auto-Populate Repeated Fields, you can further save signers' valuable time by automatically filling out repeated fields for them. This feature is great for large documents where signers need to input the same data multiple times, like their home address, phone number and more.

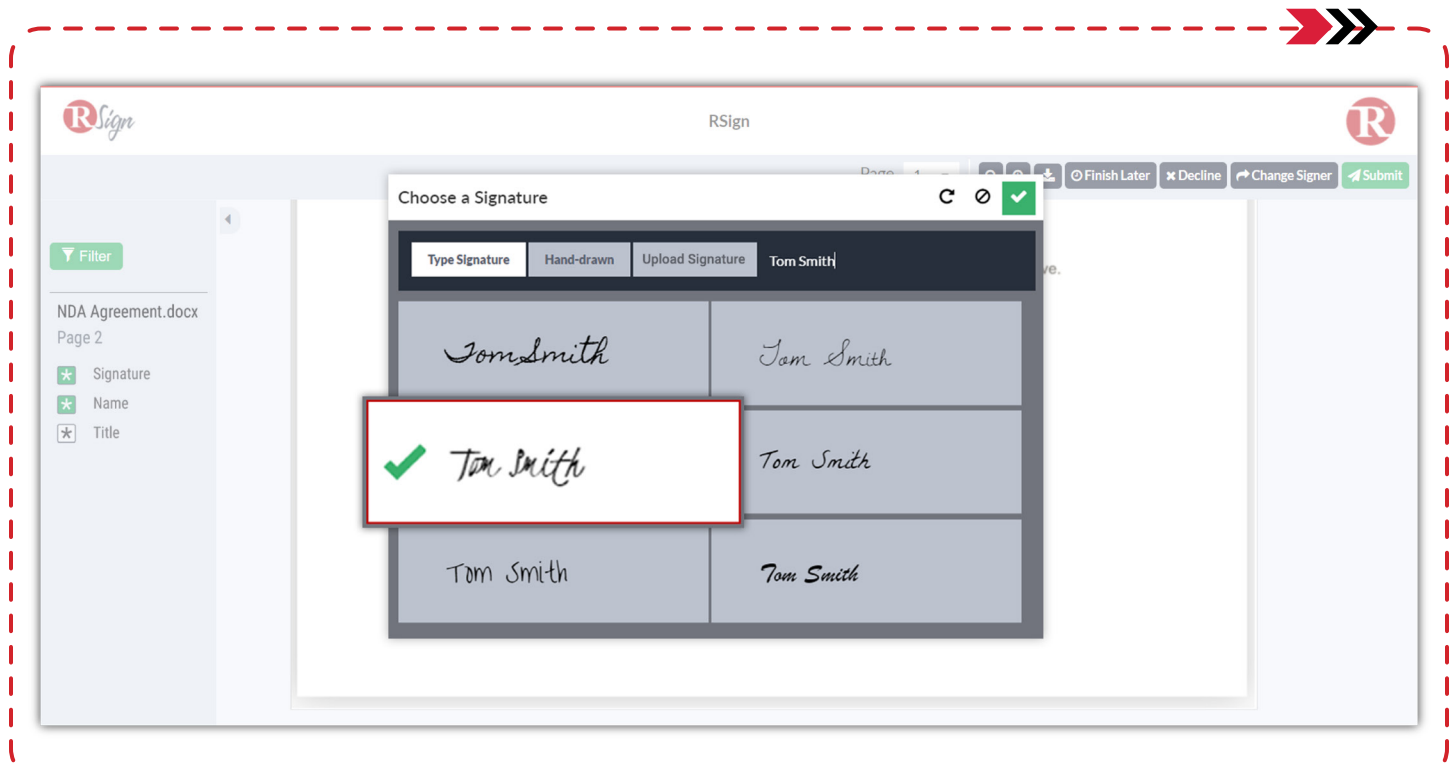
## Branded Experience



Customize RSign notifications and signing process with your company's logo for a cohesive branded experience.

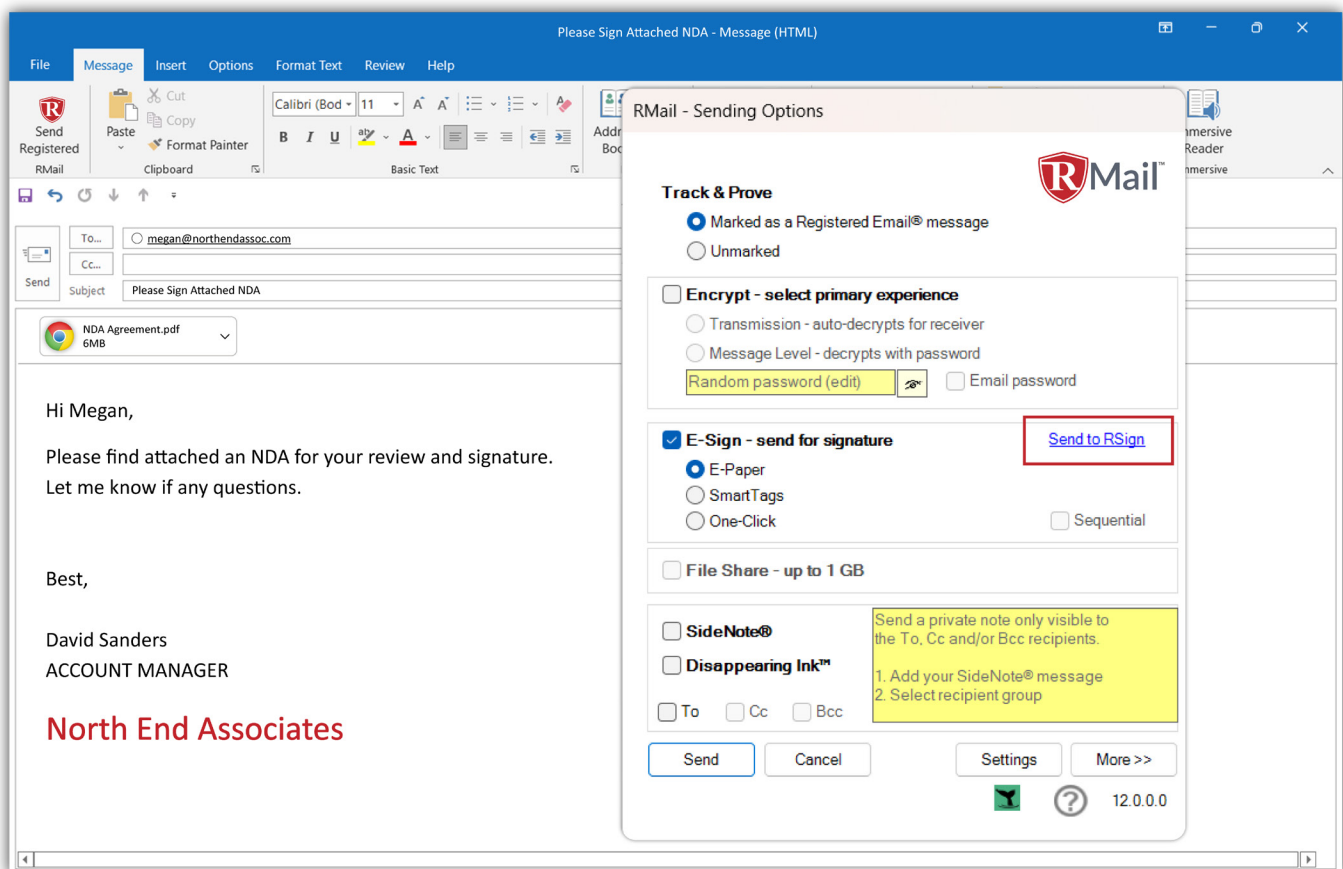
- Configurable Company Logo, Banner Background and Text Color
- Configurable Footer text
- Redirect your signers to the website of your choice after finalizing the signing process

## Signature Capture Methods



For an enhanced signer experience, you can provide multiple options to electronically sign a document: typing their signature, hand-drawing using their mouse or touch-screen, or even uploading a picture or scan of their wet signature.

## RPost One for Outlook

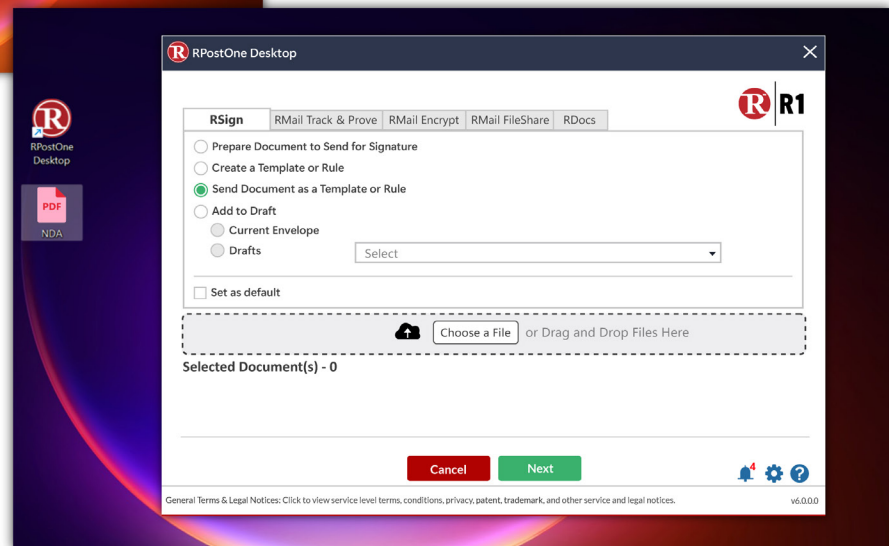
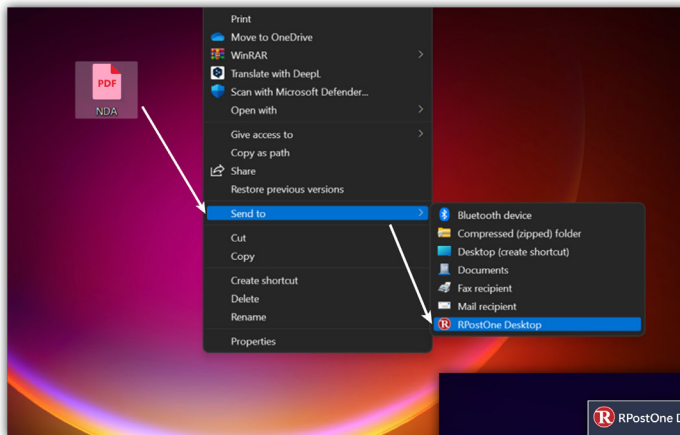


With RPost One add-in for Outlook, you can send documents for eSignature directly from Microsoft Outlook. Simply compose an email, add your recipients and attach your documents. Click on the RPost One button and select "Send to RSign". RSign will open in your default browser with your recipients pre-populated, your document attached to the eSign envelope– and even the message to your recipients populated with the subject line and body captured from Outlook.

Next, drag and drop your input fields and send. It's as easy as that.



## Print-to-Sign with RPost One for Windows

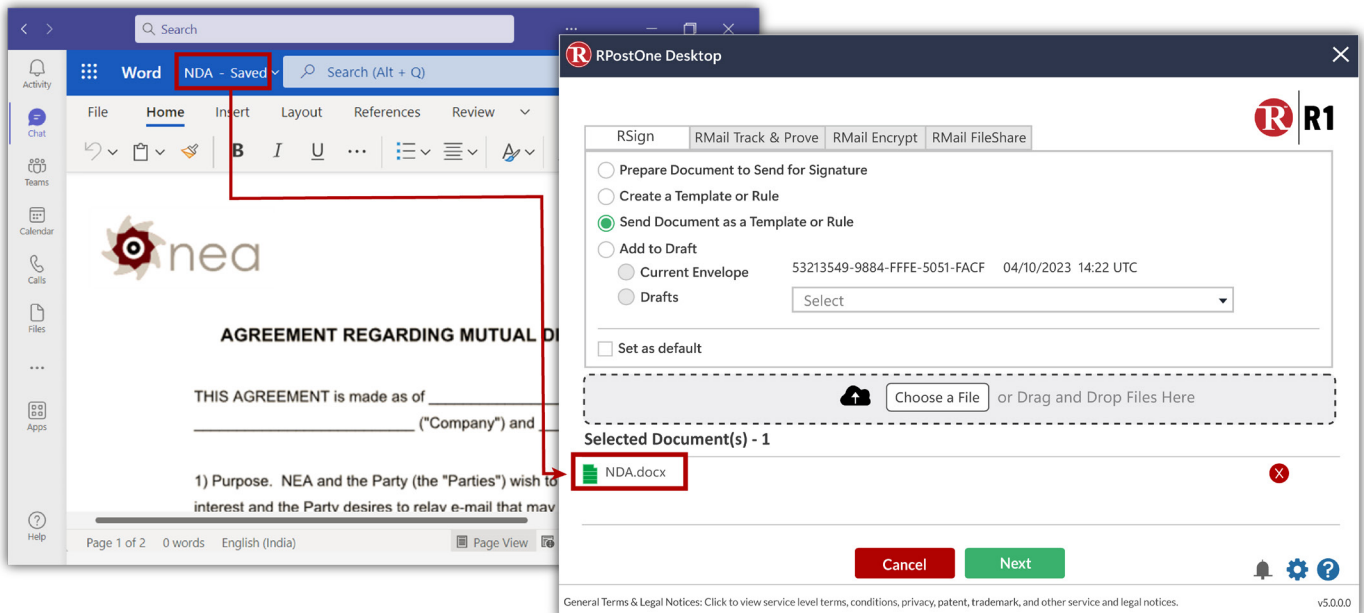


With RPost One, you can send documents and forms for eSignature from anywhere in your Microsoft Windows ecosystem: file explorer, Microsoft Office suite, or any web or desktop application.

Choose from your library of shared templates to send with a few simple clicks directly from RApp, or automatically open in RSign Web to drag and drop your fields for a one-time send.

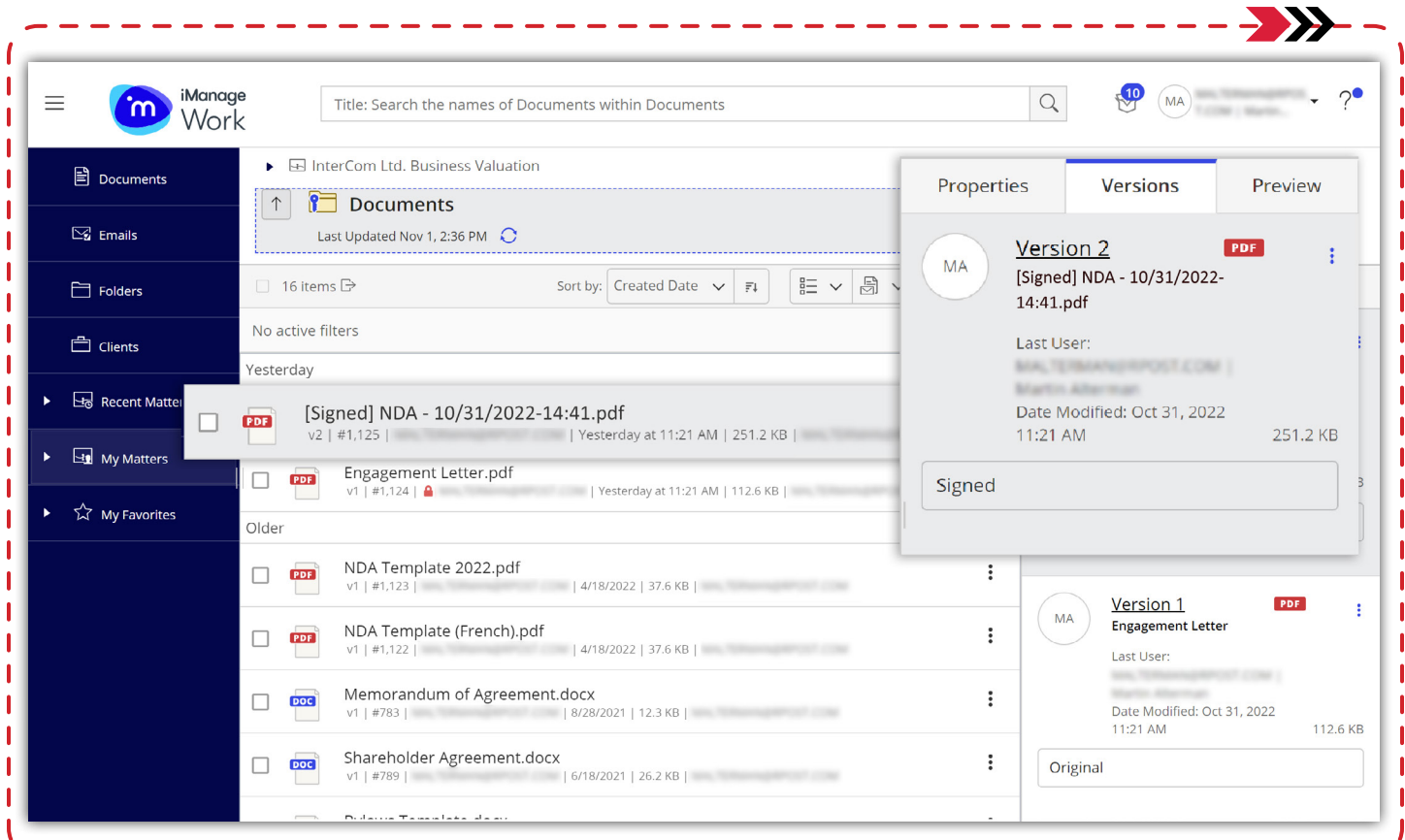


### Example Use Case: RPost One with Microsoft Teams



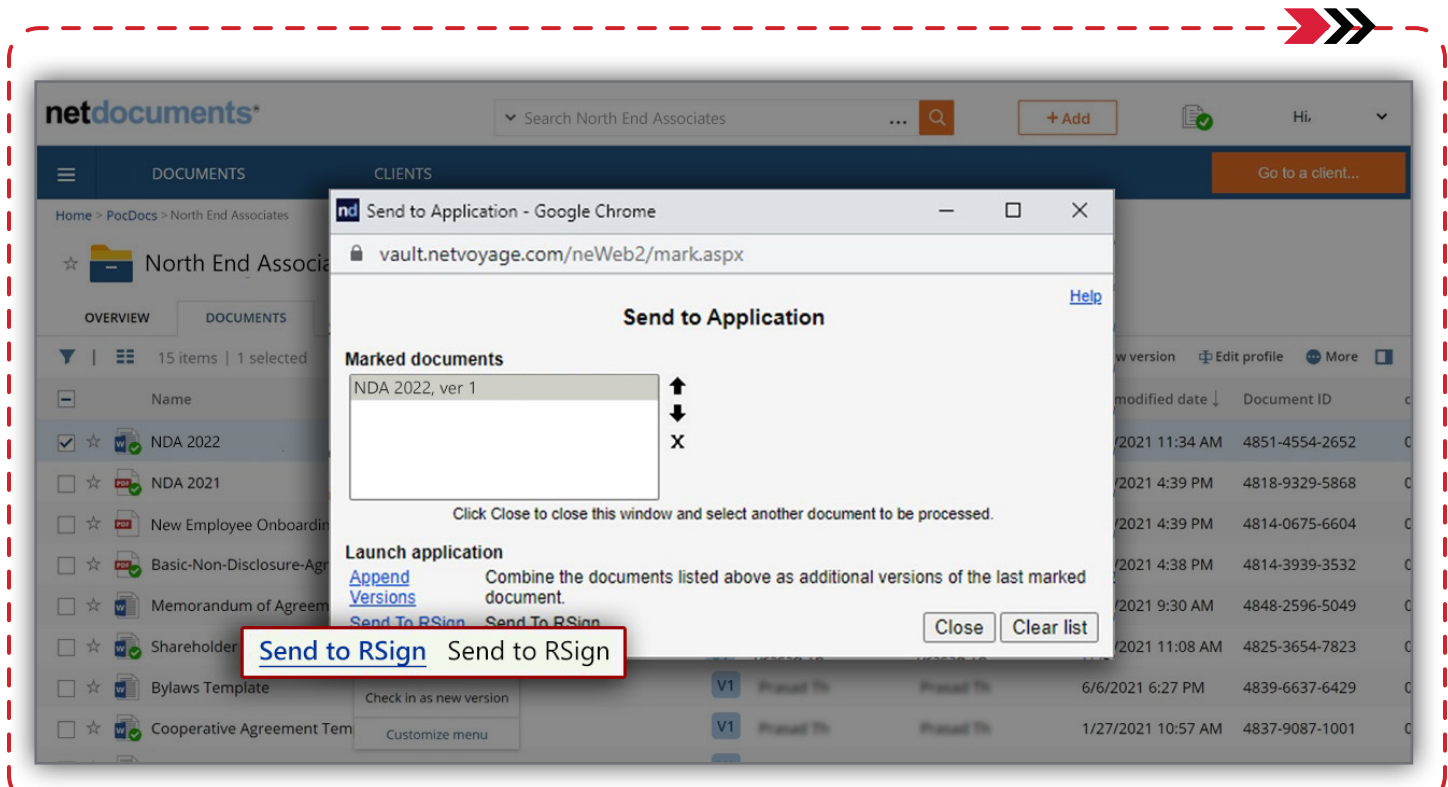
RSign makes it easy to send documents for eSignature directly from Microsoft Teams in a few simple clicks. Simply open a file in any chat, team or channel and select the Print option in the tools menu. Select the RPost One printer, and your document will magically appear in the RPost One desktop application. From there, simply add a rule and send, or open it in RSign with one click to prepare as a one-off or even as a reusable template.

## RSign Apps: RSign for iManage



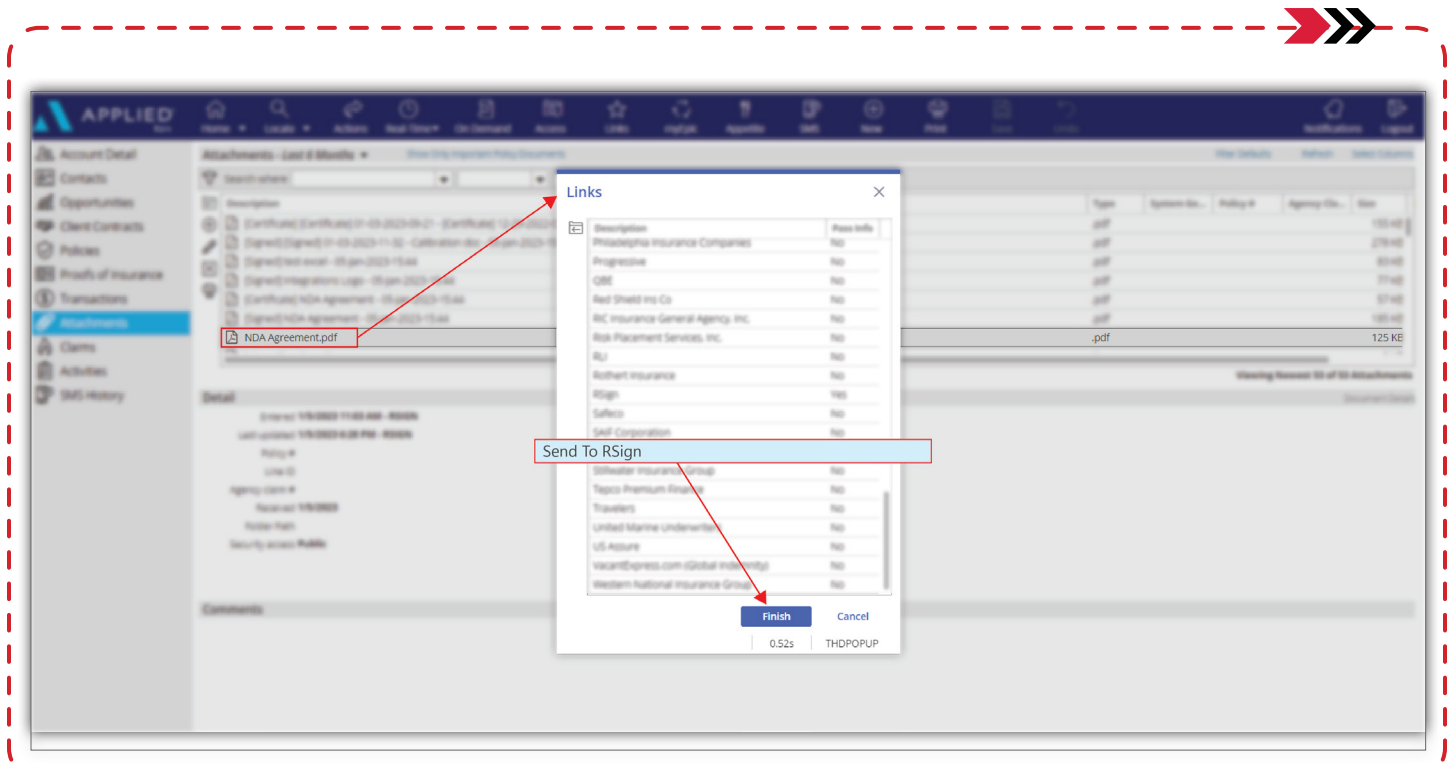
RSign for iManage makes it easy for lawyers and members of legal departments to send documents for eSignature directly from their iManage platform, enhancing productivity and eliminating the compliance risks of downloading customer data to their local devices. Signed documents will be automatically stored in iManage once they are completed.

## RSign Apps: RSign for NetDocuments



RSign for NetDocuments makes it easy for lawyers and members of legal departments to send documents for eSignature directly from their NetDocuments platform, enhancing productivity and eliminating the compliance risks of downloading customer data to their local devices. Signed documents will be automatically stored in NetDocuments once they are completed.

## RSign Apps: RSign for Applied Epic

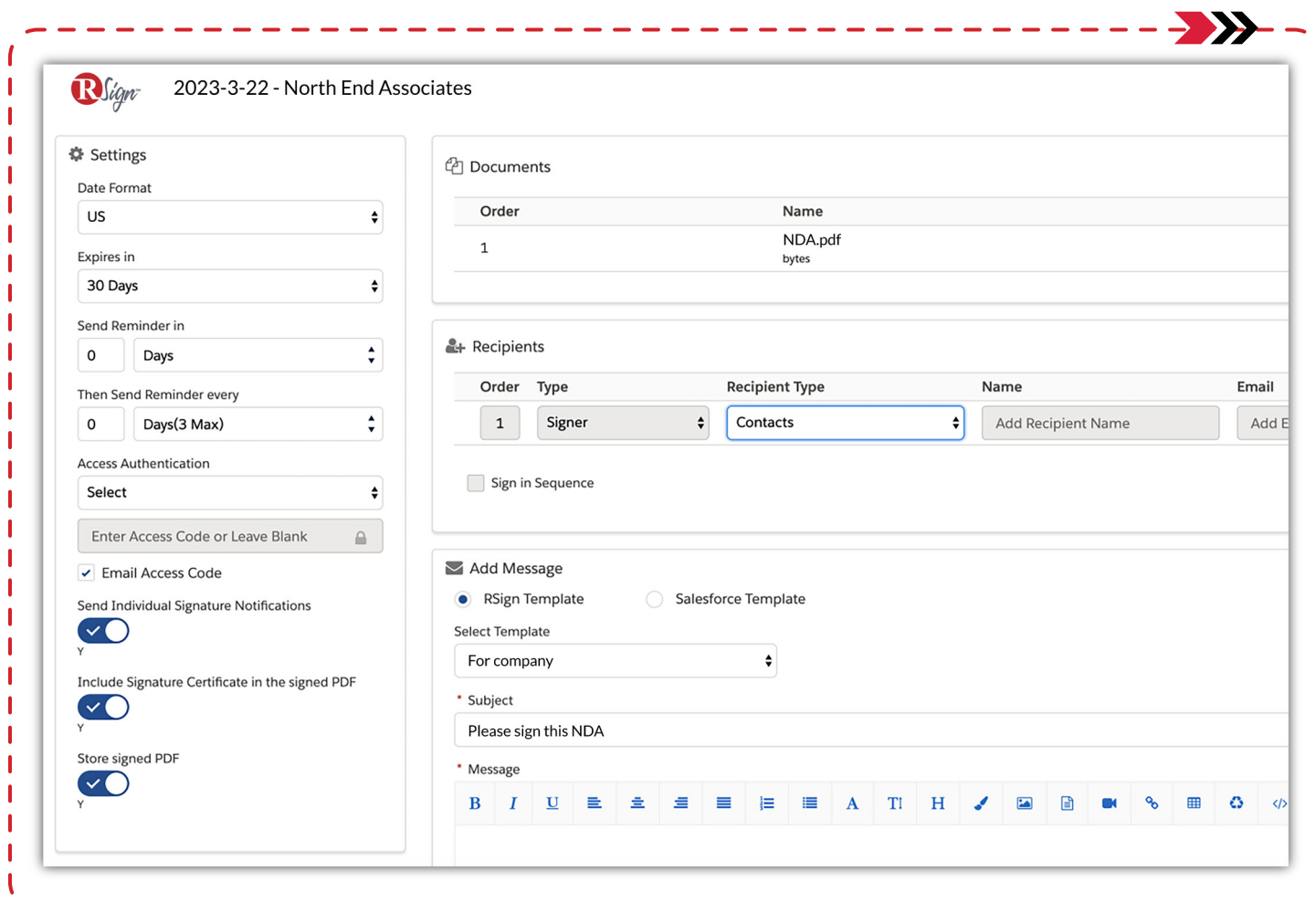


RSign for Applied Epic boosts productivity and adoption by allowing users to send documents for eSignatures directly from within Applied Epic. Once the contract is completed, it will be automatically attached to the corresponding account in the Applied Epic platform.

Plus, senders can also choose to import their contacts from Applied Epic to make the envelope preparation even simpler.



## RSign Apps: RSign for Salesforce



**2023-3-22 - North End Associates**

**Settings**

Date Format: US

Expires in: 30 Days

Send Reminder in: 0 Days

Then Send Reminder every: 0 Days(3 Max)

Access Authentication: Select

Enter Access Code or Leave Blank

☒ Email Access Code

Send Individual Signature Notifications: ☒

Include Signature Certificate in the signed PDF: ☒

Store signed PDF: ☒

**Documents**

Order	Name
1	NDA.pdf bytes

**Recipients**

Order	Type	Recipient Type	Name	Email
1	Signer	Contacts	Add Recipient Name	Add E

☐ Sign in Sequence

**Add Message**

☒ RSign Template ☐ Salesforce Template

Select Template: For company

\* Subject: Please sign this NDA

\* Message:

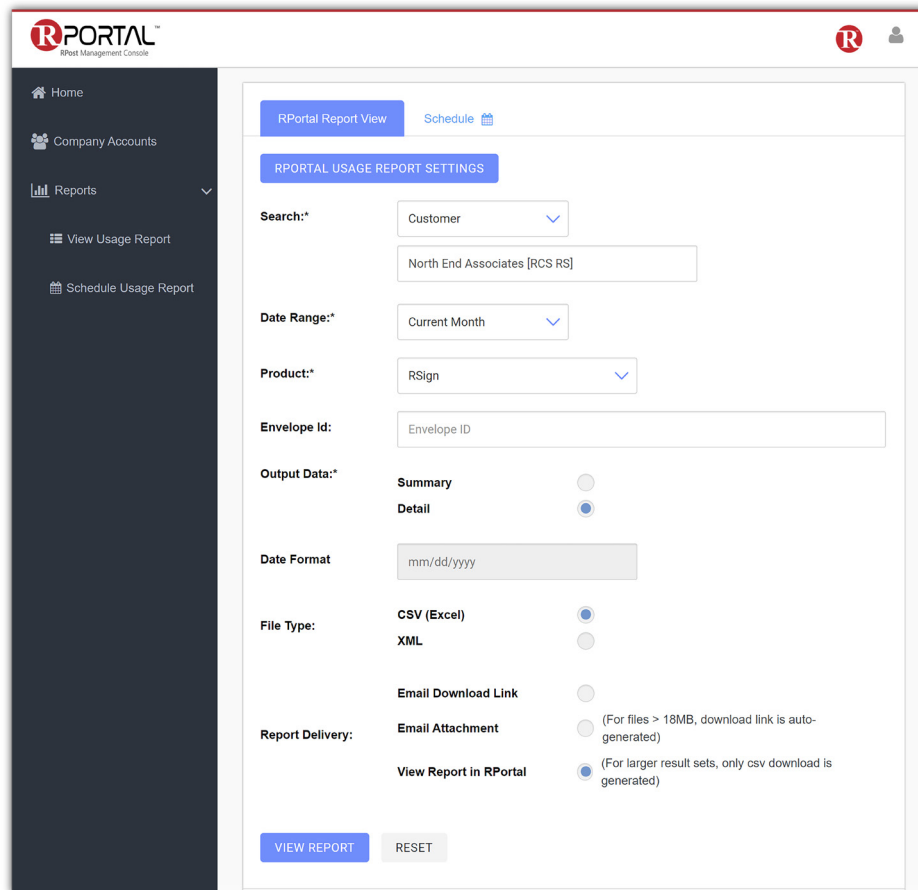
Rich text editor toolbar: B, I, U, List, Indent, Decrease Indent, Increase Indent, Bold, Italic, Underline, Link, Unlink, Table, Undo, Redo, Source Code

RSign for Salesforce adds advanced eSignatures for sending documents to recipients to record their electronic signatures, and much more from within Salesforce.

RSign for Salesforce includes options to create forms as templates with a controlled fill and eSign process, pre-populate the templates with data from Salesforce fields, and backfill form data and eSign status and records into mapped Salesforce fields.



## Custom Usage Reports



The screenshot shows the RPortal Management Console interface for generating usage reports. The left sidebar contains navigation links: Home, Company Accounts, Reports (expanded), View Usage Report, and Schedule Usage Report. The main content area is titled 'RPortal Usage Report Settings' and includes the following fields and options:

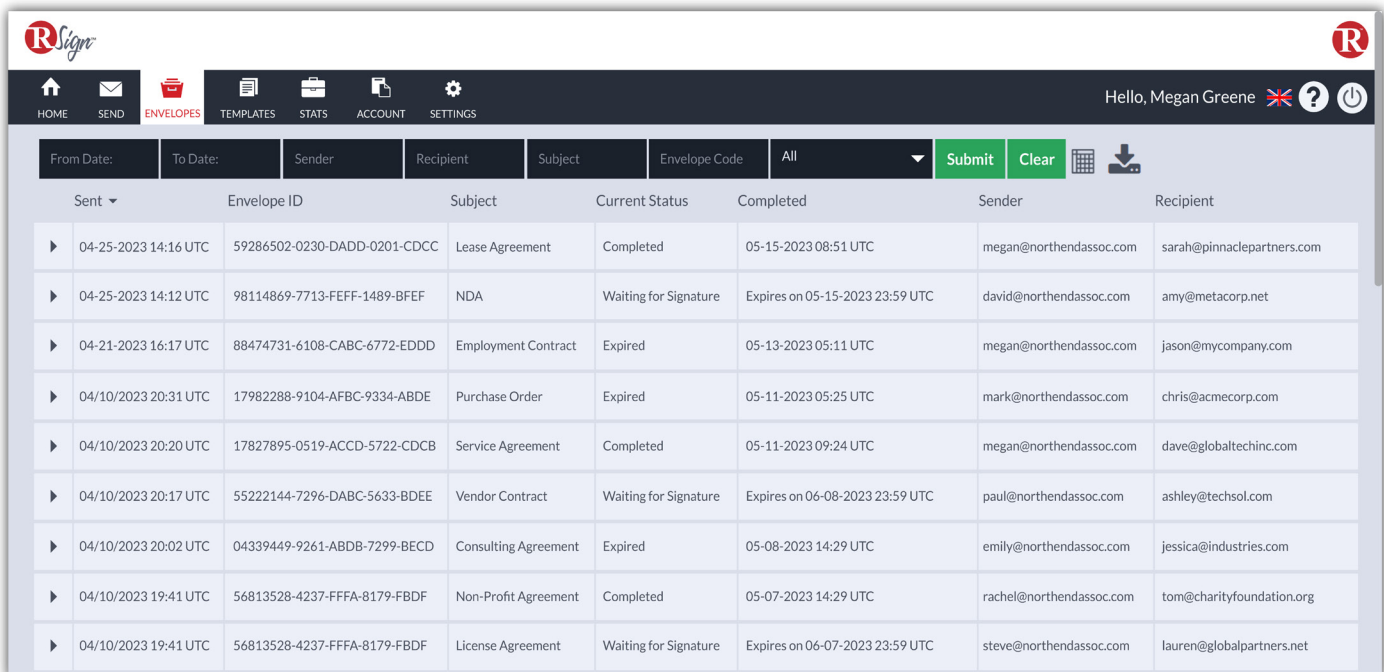
- Search:** A dropdown menu set to 'Customer' and a text input field containing 'North End Associates [RCS RS]'.
- Date Range:** A dropdown menu set to 'Current Month'.
- Product:** A dropdown menu set to 'RSign'.
- Envelope Id:** A text input field containing 'Envelope ID'.
- Output Data:** Two radio buttons: 'Summary' (unselected) and 'Detail' (selected).
- Date Format:** A text input field containing 'mm/dd/yyyy'.
- File Type:** Two radio buttons: 'CSV (Excel)' (selected) and 'XML' (unselected).
- Report Delivery:** Three radio buttons: 'Email Download Link' (unselected), 'Email Attachment' (unselected), and 'View Report in RPortal' (selected). Below these are two explanatory notes: '(For files > 18MB, download link is auto-generated)' and '(For larger result sets, only csv download is generated)'.

At the bottom of the form are two buttons: 'VIEW REPORT' (in blue) and 'RESET' (in grey).

Run Reports to find out who's using RSign. Generate reports in real time or schedule reports to review usage on a company or user level to make sure which users are effectively using RSign.

Select how you want to run your report, by date ranges: weekly, monthly, quarterly, yearly or custom date range reports; run a summary or a detailed report to get a better idea of your company's usage.

## Envelopes Monitor

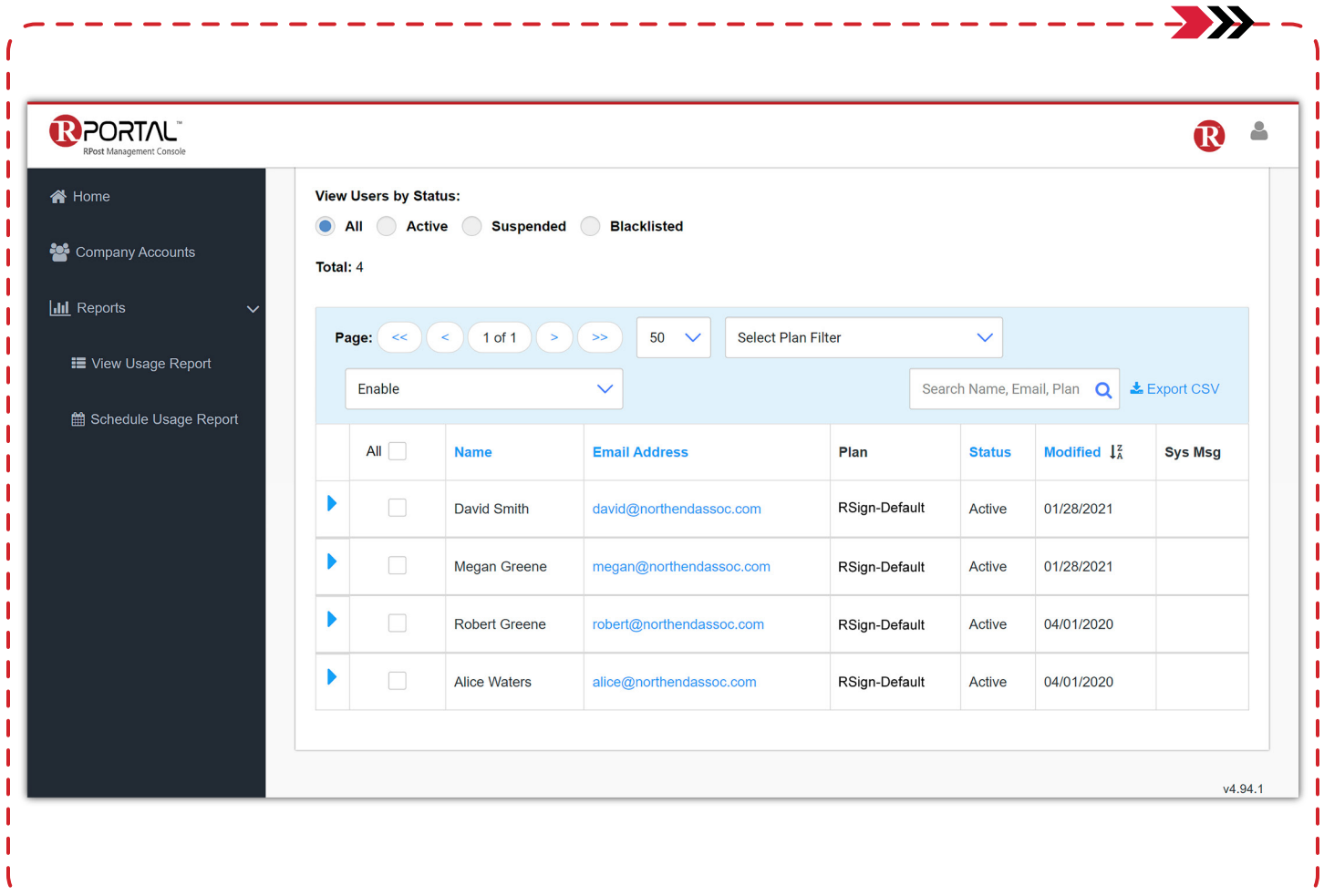


The screenshot shows the RSign web application interface for monitoring envelopes. The top navigation bar includes links for HOME, SEND, ENVELOPES (active), TEMPLATES, STATS, ACCOUNT, and SETTINGS. The user is logged in as Megan Greene. The main content area displays a table of envelopes with columns for From Date, To Date, Sender, Recipient, Subject, Envelope Code, and All. The table lists 10 envelopes with their respective IDs, subjects, statuses, completion dates, and sender/recipient email addresses.

From Date:	To Date:	Sender	Recipient	Subject	Envelope Code	All	Submit	Clear		
Sent	Envelope ID	Subject	Current Status	Completed	Sender	Recipient				
04-25-2023 14:16 UTC	59286502-0230-DADD-0201-CDCC	Lease Agreement	Completed	05-15-2023 08:51 UTC	megan@northendassoc.com	sarah@pinnaclepartners.com				
04-25-2023 14:12 UTC	98114869-7713-FEFF-1489-BFEF	NDA	Waiting for Signature	Expires on 05-15-2023 23:59 UTC	david@northendassoc.com	amy@metacorp.net				
04-21-2023 16:17 UTC	88474731-6108-CABC-6772-EDDD	Employment Contract	Expired	05-13-2023 05:11 UTC	megan@northendassoc.com	jason@mycompany.com				
04/10/2023 20:31 UTC	17982288-9104-AFBC-9334-ABDE	Purchase Order	Expired	05-11-2023 05:25 UTC	mark@northendassoc.com	chris@acmecorp.com				
04/10/2023 20:20 UTC	17827895-0519-ACCD-5722-CDCB	Service Agreement	Completed	05-11-2023 09:24 UTC	megan@northendassoc.com	dave@globaltechinc.com				
04/10/2023 20:17 UTC	55222144-7296-DABC-5633-BDEE	Vendor Contract	Waiting for Signature	Expires on 06-08-2023 23:59 UTC	paul@northendassoc.com	ashley@techsol.com				
04/10/2023 20:02 UTC	04339449-9261-ABDB-7299-BECD	Consulting Agreement	Expired	05-08-2023 14:29 UTC	emily@northendassoc.com	jessica@industries.com				
04/10/2023 19:41 UTC	56813528-4237-FFFA-8179-FBDF	Non-Profit Agreement	Completed	05-07-2023 14:29 UTC	rachel@northendassoc.com	tom@charityfoundation.org				
04/10/2023 19:41 UTC	56813528-4237-FFFA-8179-FBDF	License Agreement	Waiting for Signature	Expires on 06-07-2023 23:59 UTC	steve@northendassoc.com	lauren@globalpartners.net				

As an Admin, gain full visibility over the envelopes shared across the entire organization. Give your users the ability to copy, update, re-send or cancel their sent envelopes and even allow users to share visibility over their transactions to other groups of users.

## User & Role Management

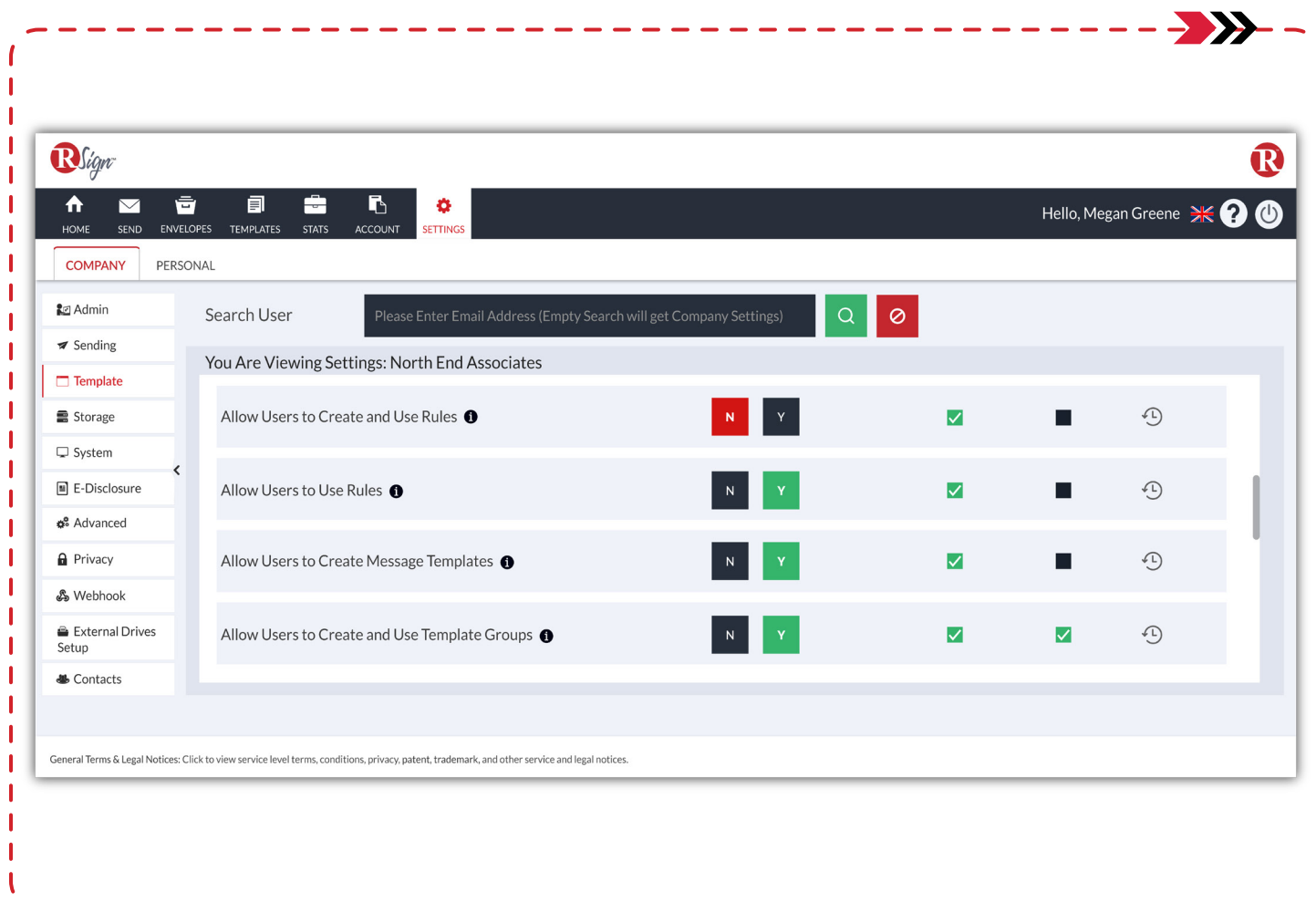


The screenshot shows the RPortal User & Role Management interface. On the left is a dark sidebar with navigation links: Home, Company Accounts, Reports (with a dropdown arrow), View Usage Report, and Schedule Usage Report. The main content area is titled 'View Users by Status:' and includes radio buttons for 'All' (selected), 'Active', 'Suspended', and 'Blacklisted'. Below this, it says 'Total: 4'. A light blue header bar contains pagination controls (Page: << < 1 of 1 > >>), a dropdown for '50', a 'Select Plan Filter' dropdown, a search bar with the text 'Search Name, Email, Plan', and an 'Export CSV' link. Below the header is a table with columns: All (checkbox), Name, Email Address, Plan, Status, Modified (with sort icons), and Sys Msg. The table lists four active users: David Smith, Megan Greene, Robert Greene, and Alice Waters, all with the 'RSign-Default' plan and a 'Modified' date of 01/28/2021 or 04/01/2020. The version number 'v4.94.1' is visible in the bottom right corner.

All <input type="checkbox"/>	Name	Email Address	Plan	Status	Modified	Sys Msg
<input type="checkbox"/>	David Smith	david@northendassoc.com	RSign-Default	Active	01/28/2021	
<input type="checkbox"/>	Megan Greene	megan@northendassoc.com	RSign-Default	Active	01/28/2021	
<input type="checkbox"/>	Robert Greene	robert@northendassoc.com	RSign-Default	Active	04/01/2020	
<input type="checkbox"/>	Alice Waters	alice@northendassoc.com	RSign-Default	Active	04/01/2020	

As an admin, RSign makes it easy to assign and manage licenses in a self-service mode, and to customize permissions on a per user or per role basis.

## Company & User Settings




The screenshot displays the RSign Admin interface. The top navigation bar includes links for HOME, SEND, ENVELOPES, TEMPLATES, STATS, ACCOUNT, and SETTINGS. The user is logged in as Megan Greene. The left sidebar lists various settings categories: Admin, Sending, Template, Storage, System, E-Disclosure, Advanced, Privacy, Webhook, External Drives Setup, and Contacts. The main content area shows the 'COMPANY' settings for 'North End Associates'. A search bar for users is present, with a placeholder text: 'Please Enter Email Address (Empty Search will get Company Settings)'. Below the search bar, a table lists four settings:

Setting	Allow	Deny	Enforced	Locked	Refresh
Allow Users to Create and Use Rules	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Allow Users to Use Rules	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Allow Users to Create Message Templates	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Allow Users to Create and Use Template Groups	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

At the bottom of the interface, there is a link for 'General Terms & Legal Notices: Click to view service level terms, conditions, privacy, patent, trademark, and other service and legal notices.'

Admins can easily manage company-wide settings and even decide which settings should be locked and enforced for all users, groups of users or individuals, and which settings can be modified by end users both at the account level or for each individual envelope.

### ESign Certificate



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**Envelope Data**

<p>Subject: NDA</p> <p>Documents: NDA.pdf</p> <p>Document Hash: 37636296</p> <p>Envelope ID: ENV84218334-1377-FBDC-7461-FBAE</p> <p>Sender: David Sanders</p> <p>Sent: 08/19/2022 05:04 AM UTC</p> <p>Status: Completed</p> <p>Status Date: 08/19/2022 05:12 AM UTC</p>	<p>Access Authentication: None</p> <p>Email Access Code: Unchecked</p> <p>Email Verification: Not enabled</p>
---	---


**Recipient(s) / Roles**

Name / Role	Address	Type
David Sanders	dave@northendassoc.com	Sender
Terry Mendez	tmendez@outlook.com	Signer

**Document Events**

Name / Roles	Email	IP Address	Date	Event
David Sanders	dave@northendassoc.com	200.123.140.109	08/19/2022 05:04 AM UTC	Created
Terry Mendez	tmendez@outlook.com	200.125.523.201	08/19/2022 05:12 AM UTC	Signed
			08/19/2022 05:12 AM UTC	Status - Completed

**Signer Signatures**

Signer Name / Roles	Signature	Initials
Terry Mendez	<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <p><b>Electronically RSigned by:</b>    08/19/2022 05:05 UTC</p> </div>	TM

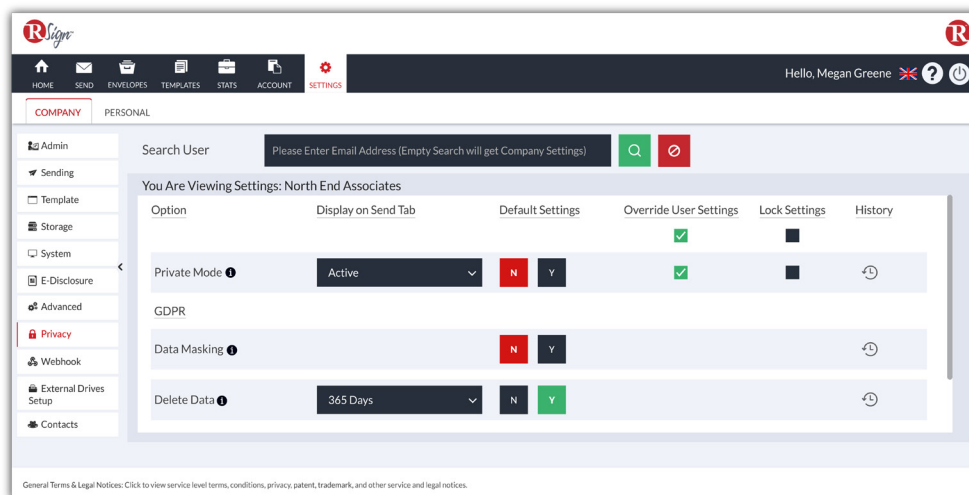
RSign's eSignature certificate is the global and local standard for legally binding, compliant eSignatures with content and metadata authentication. It details the signature of all the signers, sender and signer information, and an audit trail and metadata related to the documents of the corresponding envelope ID.

(Anatomy of the eSign certificate)

- **Envelope Data:** Contains detailed transaction information & settings used.
- **Recipients/Roles:** Displays the names of the recipients of the signing request, as well as their role in the transaction.
- **Document Events:** Displays the document audit trail and all the events from when the document was created and sent for signature until it is signed and fully completed.
- **Signer Signatures:** This section displays the signature, name and initials of each signer.



### Certified GDPR and HIPAA Compliance: Private Mode and Data Masking



- Access Authentication

RSign provides multiple access authentication and envelope encryption options to empower admins and senders for certified compliance with GDPR, HIPAA and other data privacy laws and regulations. Choose “End-to-End Encryption” to password-protect your envelope across every step of the eSignature workflow, “Required to Open Signed” to only encrypt the signed contract, or “Signer Verification” to only send the passcode to signers upon request.

- Auto-Purge Data

With Auto-Purge, admins have the power to customize the frequency with which RSign should delete a user’s personal data for compliance with GDPR and other data privacy laws and regulations.

- Private Mode

RSign Private Mode allows the RSign account holder to hide data related to a specific transaction from all other users within RSign, including the Admin. This feature is intended for high-ranking members of an organization sending highly confidential information, like CEOs, CFOs, COOs and more.

- Data Masking

When turned on, this feature blurs the transmission data in the RSign interface and prevents users from downloading documents.