

DocuSign

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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](#)

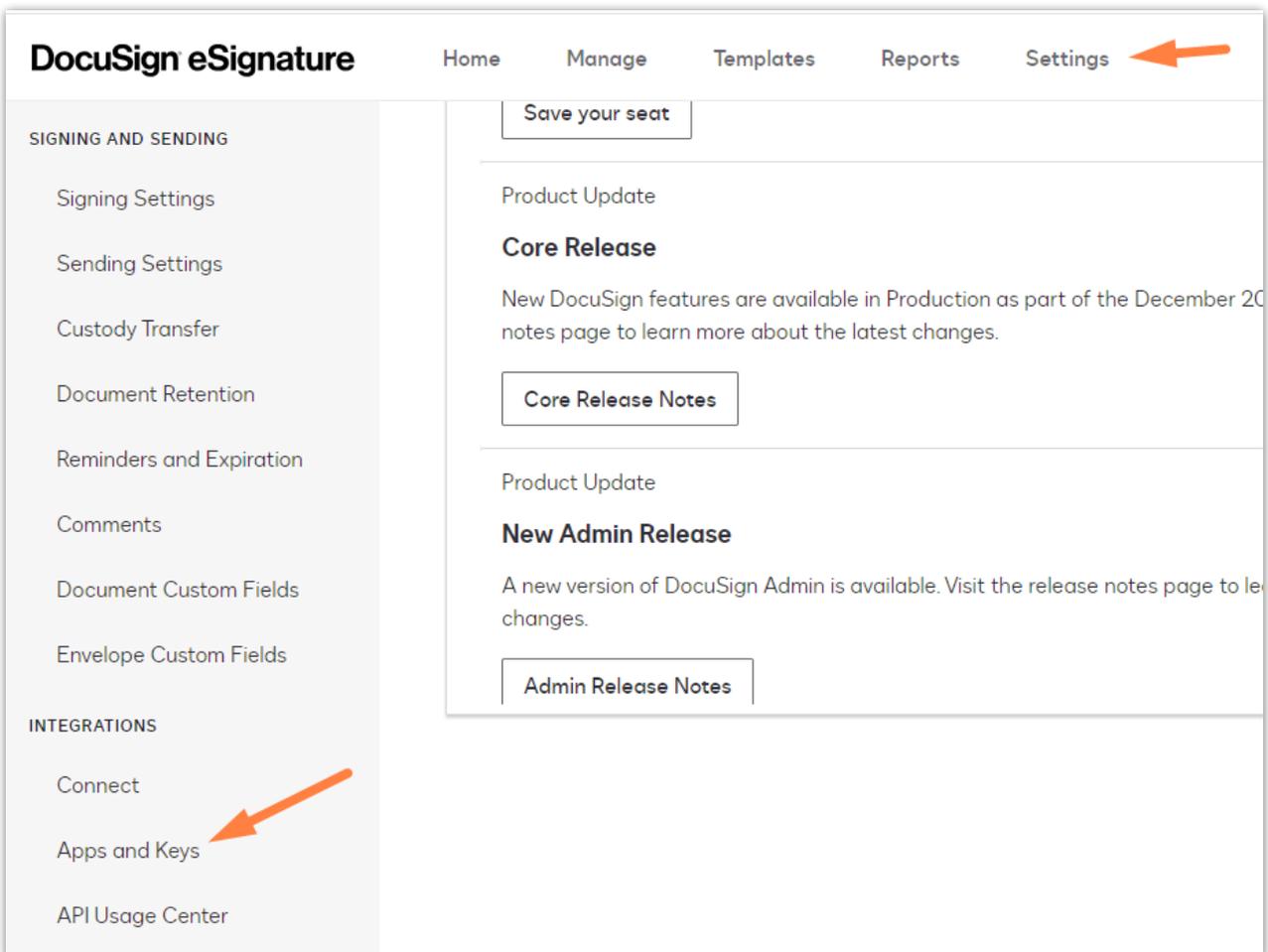
- For DocuSign, you would need a subscription for each email that will be used to send envelopes for signing.

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

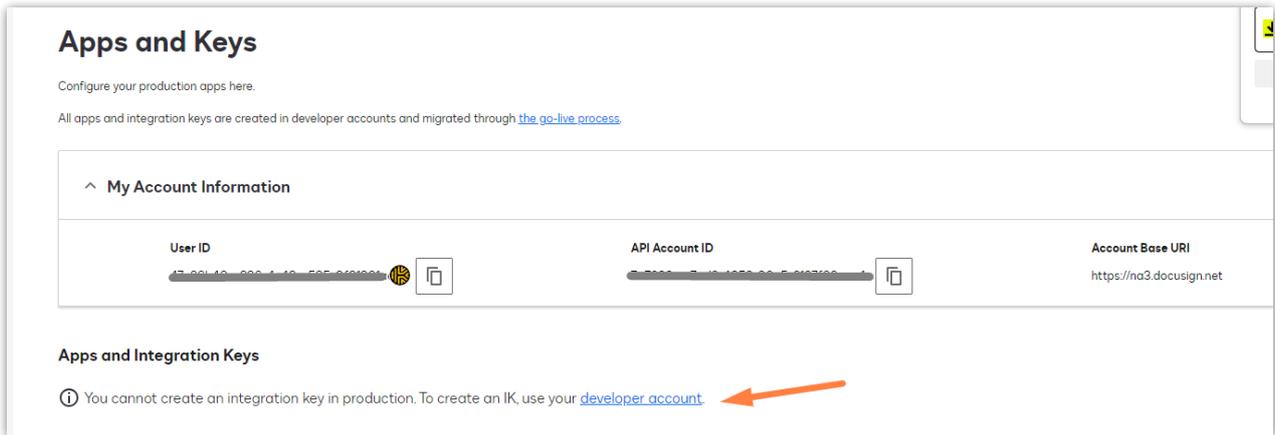
From your DocuSign Production account, click on Settings, then APIs and Keys



The screenshot shows the DocuSign eSignature interface. 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. Below the navigation bar, there is a sidebar on the left with two main sections: 'SIGNING AND SENDING' and 'INTEGRATIONS'. Under 'SIGNING AND SENDING', there are links for Signing Settings, Sending Settings, Custody Transfer, Document Retention, Reminders and Expiration, Comments, Document Custom Fields, and Envelope Custom Fields. Under 'INTEGRATIONS', there are links for 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 has a 'Save your seat' button at the top. Below that, there are two 'Product Update' sections. The first section is titled 'Core Release' and contains the text: 'New DocuSign features are available in Production as part of the December 20... notes page to learn more about the latest changes.' Below this text is a button labeled 'Core Release Notes'. The second section is titled 'New Admin Release' and contains the text: 'A new version of DocuSign Admin is available. Visit the release notes page to le... changes.' Below this text is a button labeled 'Admin Release Notes'.

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

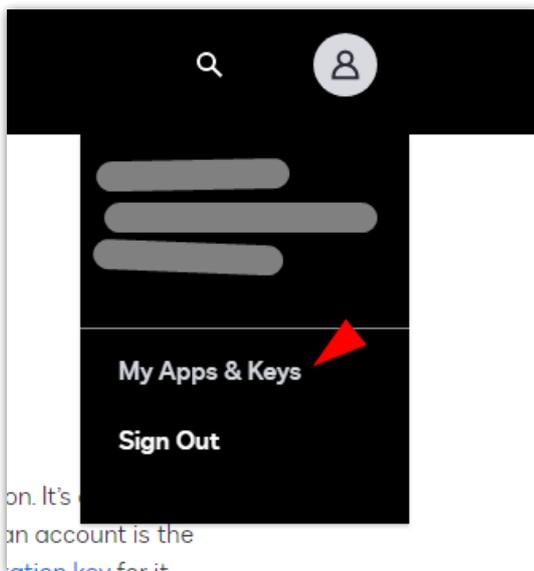
be validated before it can 'Go Live' in production, so click the developer account link to go there



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

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
70Fok8TOxCRgITNPj8bgkc520ijSrG1YhbEGGBaZQHEezpIGWG42n1L9oQe3k7n5
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

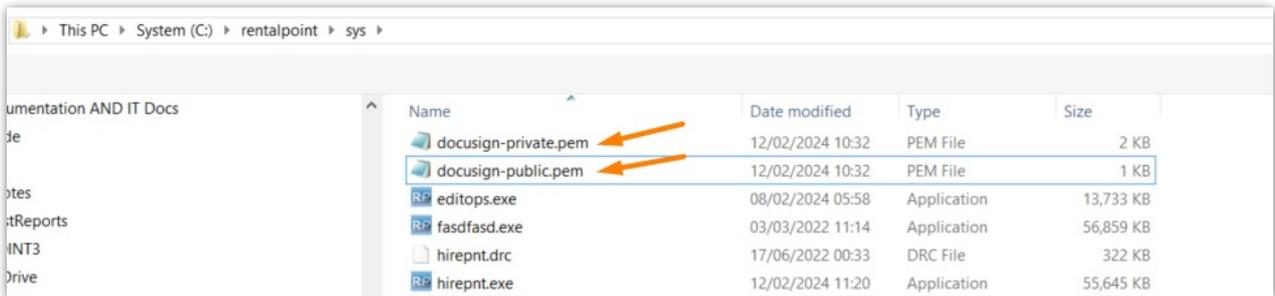
Integration Key
Your integration key (also known as a client id) is a unique identifier for your app.

Configure DocuSign in RentalPoint2

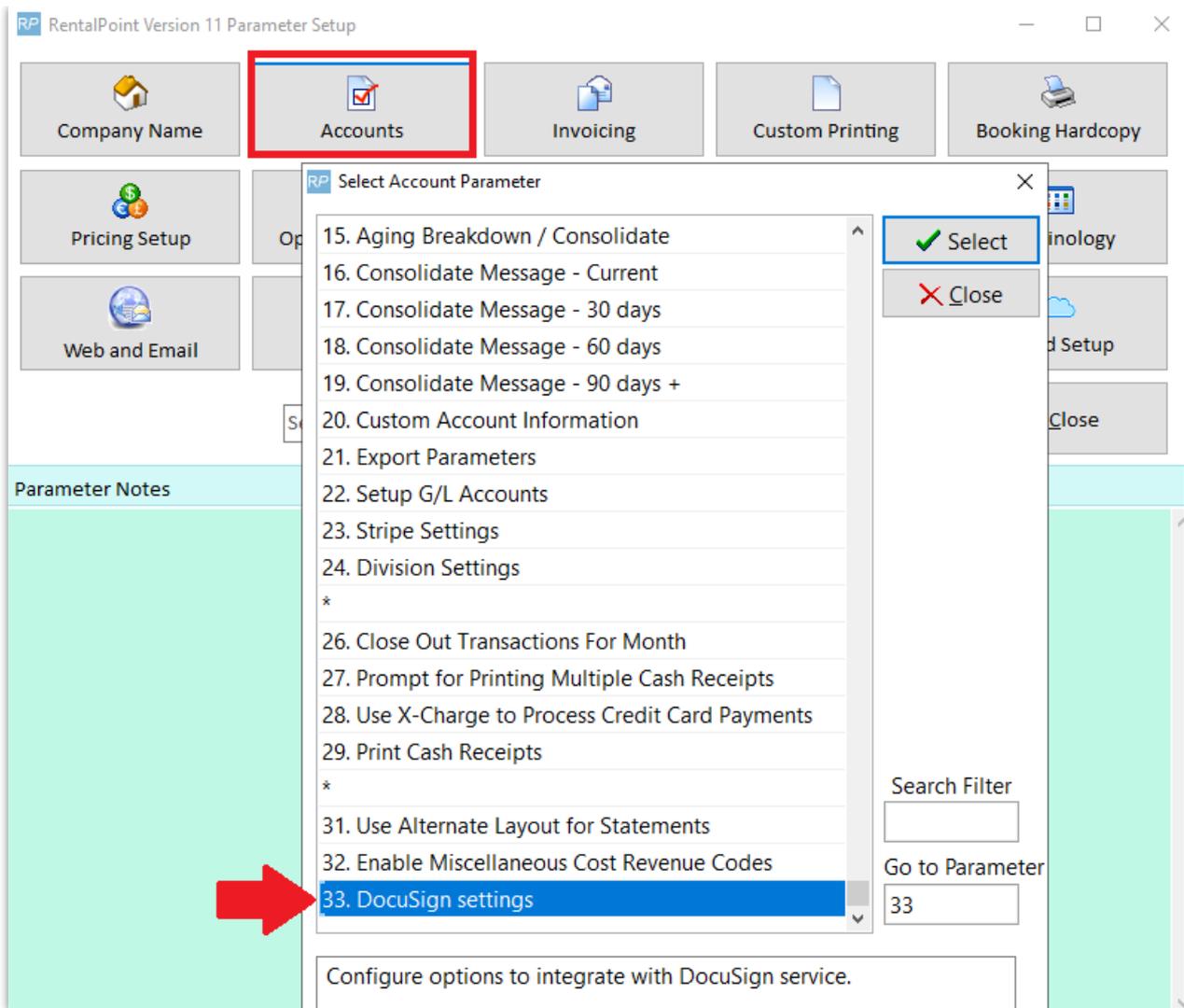
You'll need a DocuSign Account in order to set up DocuSign in RentalPoint, see DocuSign Setup above for more details.

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.

Apps and Keys

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

^ My Account Information

User ID
efb5a19b-b6e1-4100-baf8-5d47...

Apps and Integration Keys

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

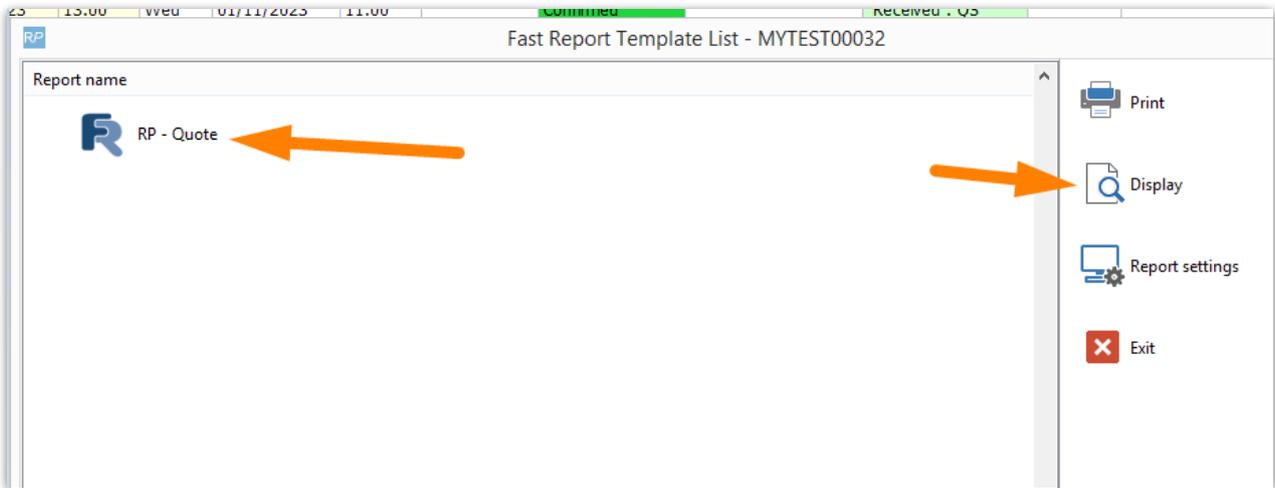
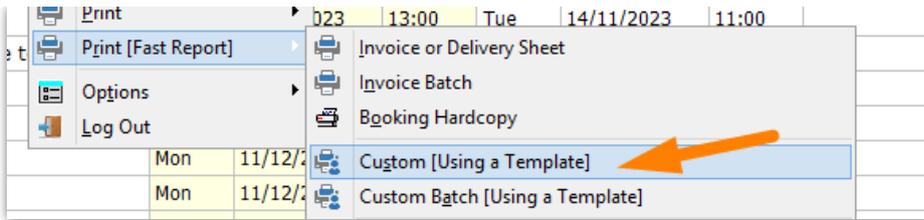
The Sign Caption and Name Caption values are what your user will see on the document they are asked to sign. Everytime you change these values, you'll need to re-add the fields to any Fast Report template in use.

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

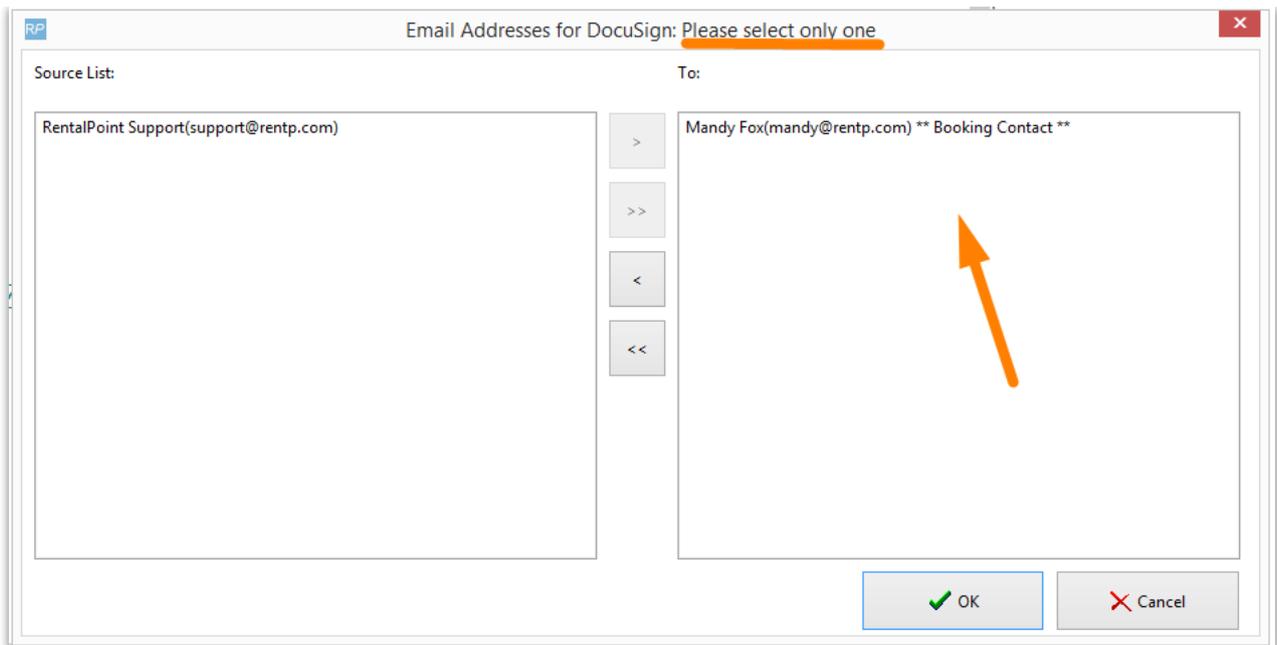
OR access from the right click menu



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.

RP2TEST2 is requesting access

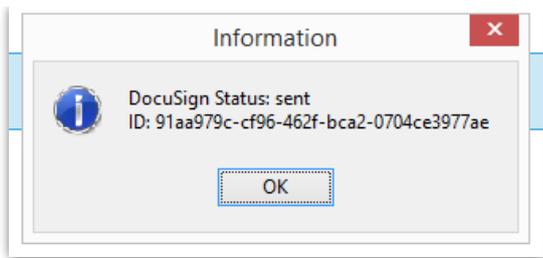
- This application will be permitted to request access to your account without you being present.
- Create and send envelopes. Obtain links for starting signing sessions.

The application you are connecting to is not provided by DocuSign, Inc. By selecting **ALLOW ACCESS**, you are allowing the application to use your information in accordance with their respective terms of service and privacy policies.

Allow Access

Cancel

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



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



Click 'submit for review'

Request App Review ✕

Requirements to pass review:

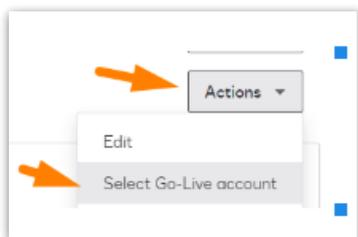
- Complete 20 consecutive successful API calls in the past 30 days
- Use [OAuth 2.0 or App Password \(for eSignature SOAP API only\)](#)
- Comply With DocuSign [API rules and limits](#).

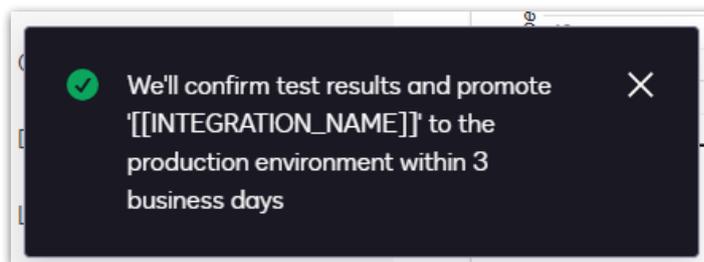
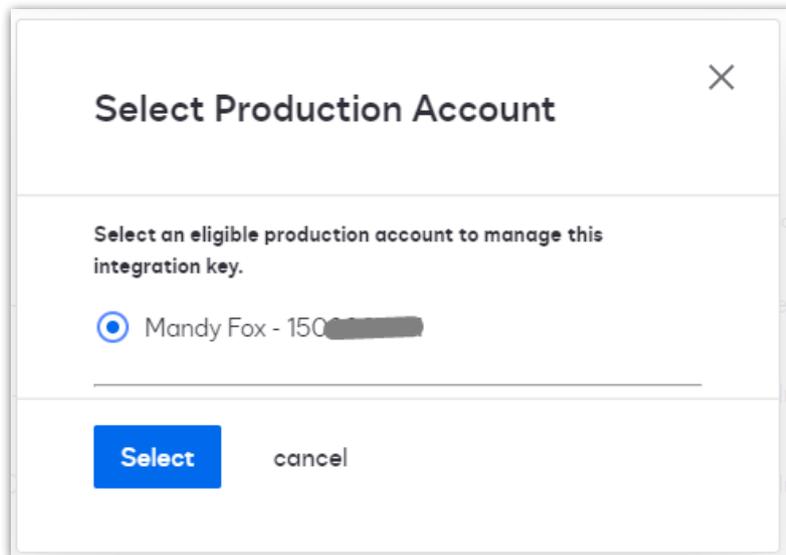
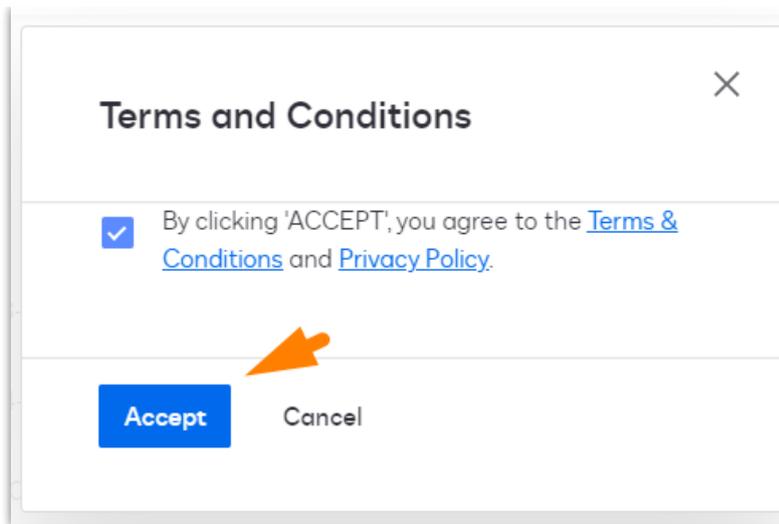
ⓘ Reviews may take up to 20 minutes.

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	eb8daf50-0651-4a58-9170-10414919101b	Development	● Review passed <small>Promote to production</small>	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		
RP2TEST2	26470d04-ac30-454b-937f-06ba646b6b9a		Actions ▾ Edit

Ensure the settings are correct

Apps and Keys > Mandy Fox

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

General Info

App Name *

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 

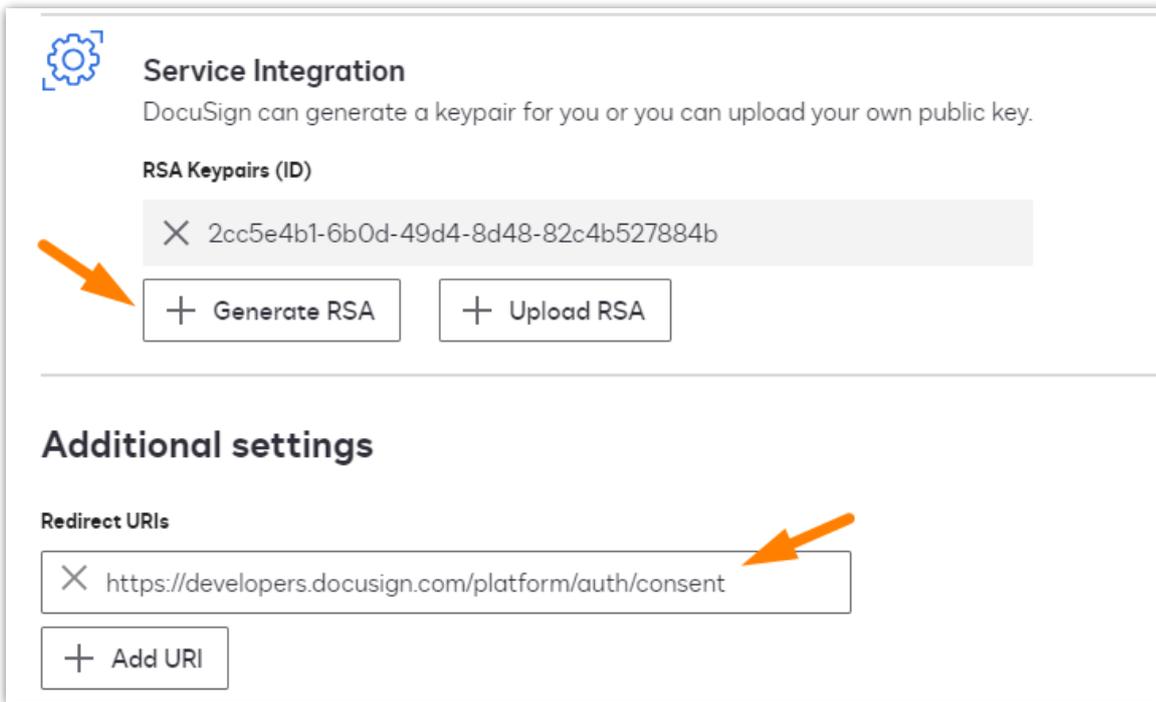
No

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

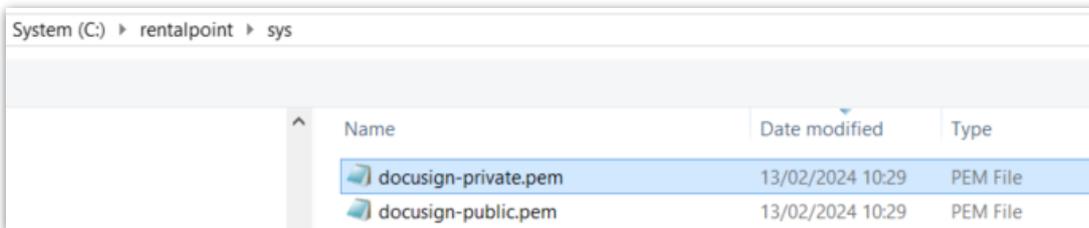
Redirect URIs

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

+ Add URI

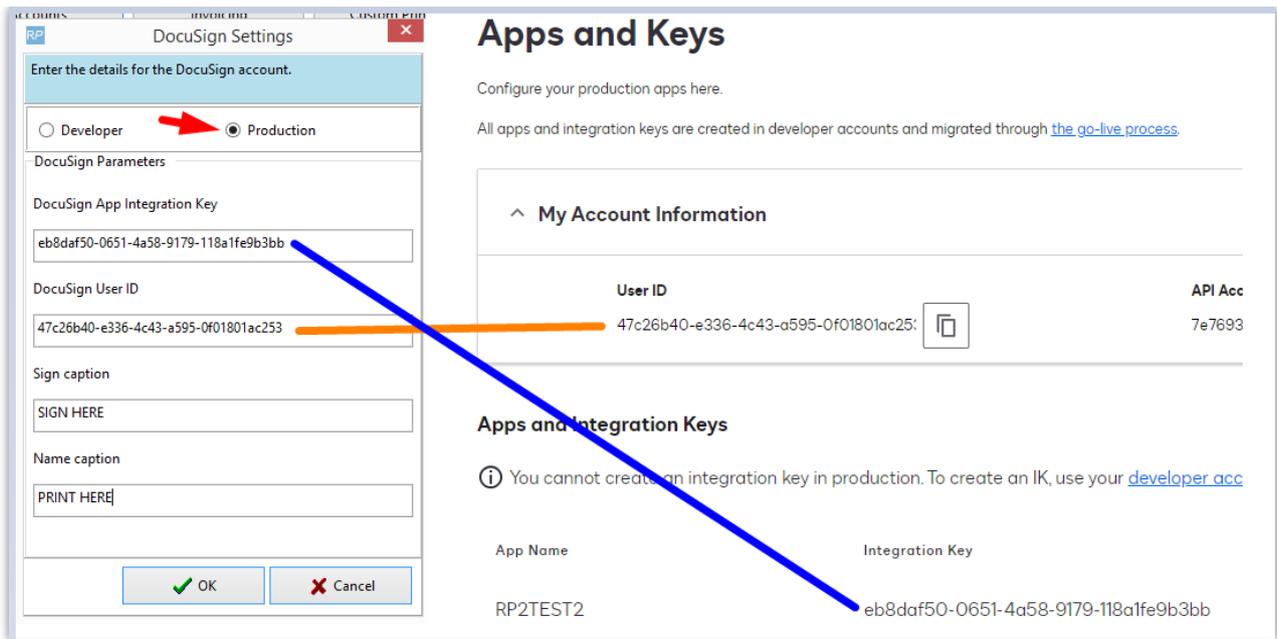
Update RentalPoint

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



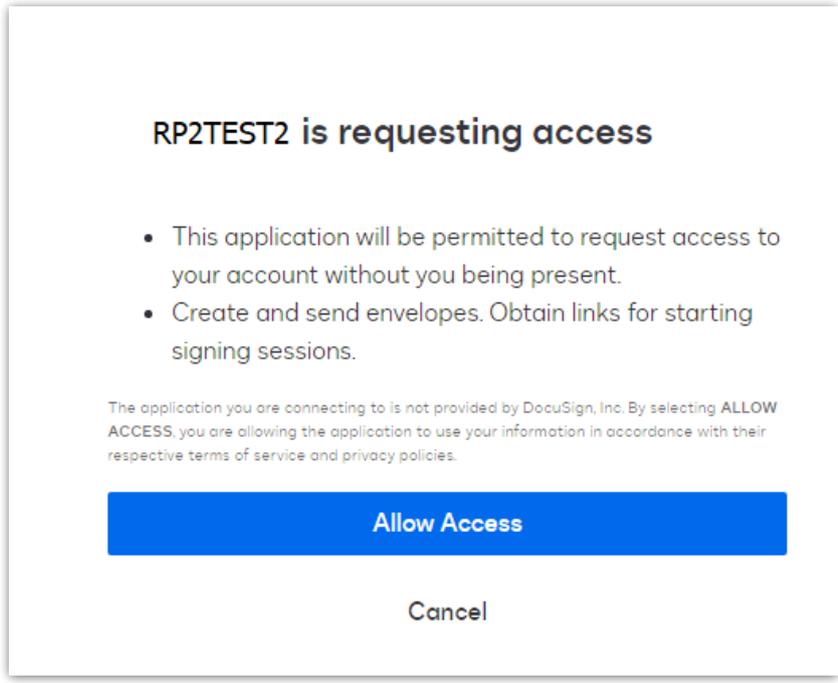
Name	Date modified	Type
docusign-private.pem	13/02/2024 10:29	PEM File
docusign-public.pem	13/02/2024 10:29	PEM File

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.



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!

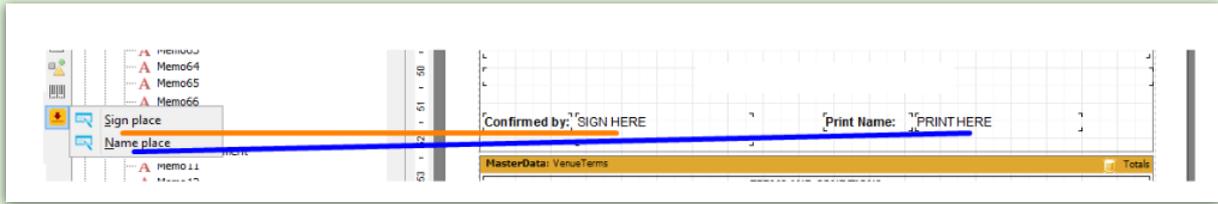


Using DocuSign in RentalPoint

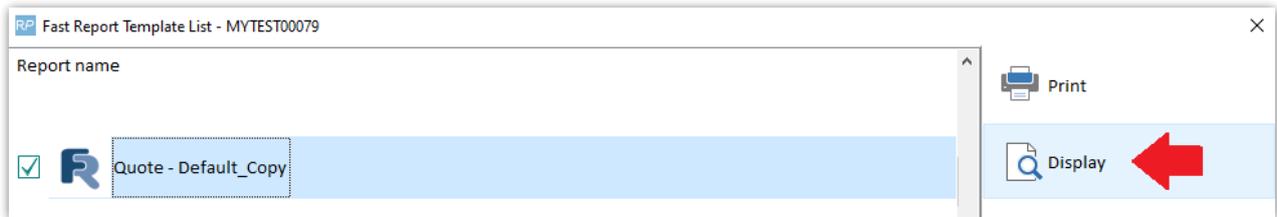
Sending Documents for Signature

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

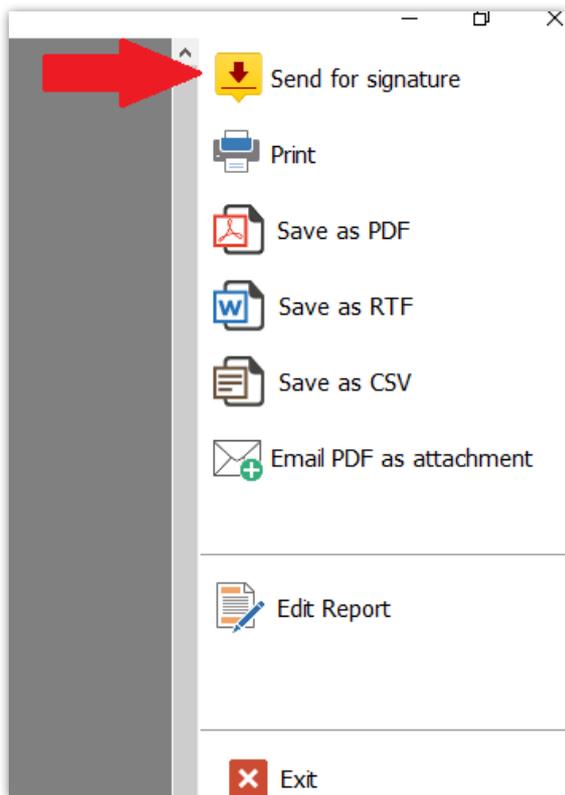
support@rentp.com for help with adding these fields if needed.



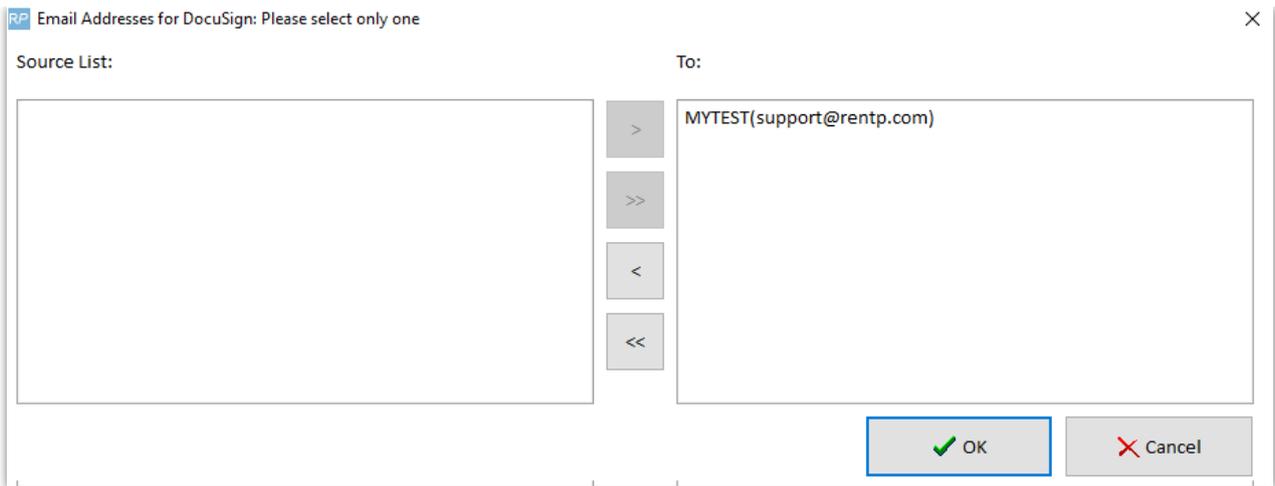
To send a document for signature, first display your Fast Report



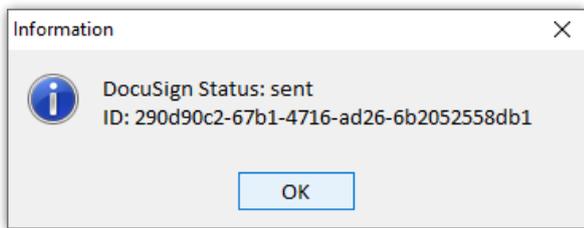
Then use the DocuSign 'Send for signature' option to request an electronic signature (if the docuSign fields are not in your template you will not see this icon)



Choose One email address to send your document to

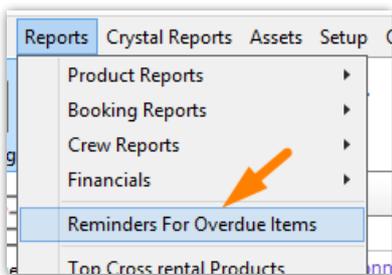


You may be required to log into your DocuSign account, once your password is confirmed, you'll get a confirmation number for your sent document.



View Documents Sent for Signature

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



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
300100039	Inhouse Systems		26/06/2023	26/06/2023	RE	0	Confirmed
ABC100043	abc compnay	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

Open Booking Refresh DocuSign Refresh

Display Preferences

- 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

0 - Main

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. Please sign the document MYTEST-00079Q-V001.pdf - RentalPoint Support sent you a document to review and sign. REVIEW DOCUMENT RentalPoint Support



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

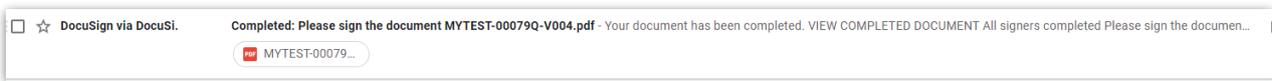


Rental	£ 100.00
Rental Discount	£ 20.00
NYC S	£ 3.60
Total	£ 83.60

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-

COMBINATION

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

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

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	
<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>

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

Status: Original Holder: RentalPoint Support Location: DocuSign
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

DocuSigned by:

93CF2F7A49ED422...
Signature Adoption: Pre-selected Style
Using IP Address: [redacted]

Timestamp

Sent: 9/27/2019 1:55:03 PM
Viewed: 9/27/2019 1:55:22 PM
Signed: 9/27/2019 2:39:30 PM

If you don't see a signing certificate in your combined PDF, check your DocuSign settings. Under Signing Settings-->Envelope Delivery, ensure 'Attach certificate of completion to envelope' set checked.

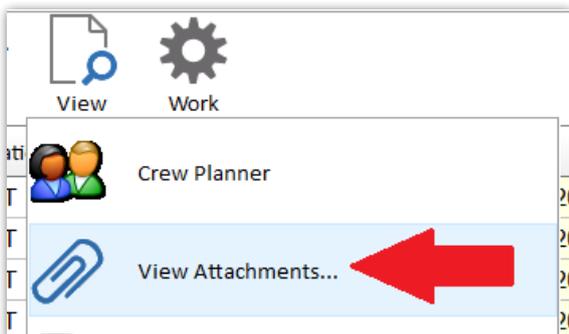
Envelope Delivery

- Attach documents to completion email
- Attach certificate of completion to envelope 
- Suppress emails to embedded signers
- 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

