

## **finPOWER Connect – Secured Signing**

Set-up and Configuration Guide

Version 2.00

3<sup>rd</sup> May 2024

## CONTENTS

finPOWER Connect – Secured Signing .....	1
Contents .....	2
Disclaimer .....	3
Revision History .....	3
Overview .....	4
Guide Summary .....	4
System Requirements .....	4
Version .....	4
Licensing .....	4
Support .....	4
Secured Signing Configuration .....	5
Setting up your account with Secured Signing .....	5
Creating an API Key and Secret .....	11
Configuration in finPOWER Connect .....	13
Test Credentials .....	21
Updating your Documents .....	22
Webhook Callback Functionality .....	23
Overview .....	23
Setting up Webhook Callback Functionality .....	23

## DISCLAIMER

This document is for informational purposes only. All information contained in this document is provided "as is" without warranty of any kind. As per your Software Licence Agreement, Intersoft accepts no liability for any decisions made based on this information.

**Please note** not all functionality contained within this document may be available in all versions of finPOWER Connect. We suggest you search the Intersoft Knowledge Base for updates and information.

## REVISION HISTORY

Date	Version	By	Details
29/08/2016	1.0	CR	Created.
07/09/2016	1.1	AC	General Revision.
03/05/2024	2.0	CH	Complete re-write.

## OVERVIEW

Digital signatures are a robust and reliable solution to accelerate the document signing process. You can use the cloud based digital signature services for an affordable and legally binding e-signature.

---

## GUIDE SUMMARY

This document covers the setup of a Secured Signing account and the configuration required to use Secured Signing with the Electronic Signatures Add-on.

---

## SYSTEM REQUIREMENTS

### Version

Secured Signing can be found in versions of finPOWER Connect from 3.00.02 onward. The information in this guide is based on version 4.01 of finPOWER Connect and finPOWER Connect Cloud.

It is important to note, that the configuration of this service was moved from Global Settings to **Admin** → **Cost Centres**, in version 3.02.

Some features may only be available in later versions of finPOWER Connect. Like for example, the use of Webhooks for Electronic Signatures only became available from version 3.04.02. Our Knowledge Base, found on our website can be used as a reference to confirm details of any version specific changes.

<https://www.intersoft.co.nz/Support/Kb.aspx>

### Licensing

This service requires the **Electronic Signatures Add-on**.

<https://www.intersoft.co.nz/Products/Product.aspx?id=Product.finPOWERConnect.Modules.ElecSig>

Webhook Callback is additional functionality, that would require the Web Services and Automation add-on. More information on this can be found on page 23 of this document.

[Intersoft Systems - finPOWER Connect Web Services and Automation Add-On](#)

### Support

If you have any issues with your Secured Signing account, you can contact Secured Sign at [helpdesk@securedsigning.com](mailto:helpdesk@securedsigning.com).

Queries regarding the finPOWER Connect side of the configuration, set up of document templates and any customisations can be sent to your finPOWER Connect Dealer.

finPOWER Connect also has a Secured Signing section in our online Help accessible from the link below:

<http://help.intersoft.co.nz/fin4.0.4/index.htm#XCostCentre.SecuredSigning>

## SECURED SIGNING CONFIGURATION

### SETTING UP YOUR ACCOUNT WITH SECURED SIGNING

Please note: Only Admin users will be able to access the area required to configure Secured Signing.

1. In finPOWER Connect, go to Admin → Global Settings → Secured Signing → Credentials tab, select the 'Sign Up' button.

**Cost Centres**

**GLOBAL: Global Cost Centre**

Global Cost Centre

GLOBAL

☐ Use Service?

**Does this Cost Centre define Secured Signing details?**

If you are not already registered at Secured Signing click the button to Sign Up.

**Define the service Request URL.**

Request URL:

**Define the User Credentials.**

Key:

Secret Key:

**Authentication Details.**

Authentication URL:

Authentication Token:

**Optionally define the Callback URL to handle events.**

Callback URL:

**Global Cost Centre List:**

- General
- Adobe Sign
- APLYiD
- Centrix NZ
- ClickSend
- Credit Sense
- DocuSign
- Equifax NZ
- Illion BankState...
- Illion New Zealand
- InfoAgent
- MotorWeb NZ
- NZ Government
- RealAML
- Secured Signing**
- Twilio
- TxtStream
- Zepto NZ
- Usage
- Audit
- Reports**
  - Print
  - List
  - Analysis
- Utilities**
  - Export
  - Import

**Tab Navigation:** **Credentials** | Test Credentials | Options

- You will be directed to the Secured Sign web page as shown below.

Select from the available options to construct your Secured Sign Business plan.  
Enter your email address and when ready, click Continue.

**Secured Signing**

**1 Plan Details** **2 Account Setup** **Secured Signing welcomes finPOWER customers**  
**finPOWER CONNECT**

**ORDER SUMMARY**

**Business Plan**

**Add Notary** ☒ No ☐ or ☐ Yes

**Billing Options** ☒ Monthly ☐ or ☐ Annual

**Payment Plan** ☒ PAYG ☐ or ☐ Prepaid

**Users**  1 Users

For more than 10 users or more than 300 documents per month, please contact [Secured Signing](#)

**Cost Starts At** **NZD \$9.95+GST / Month**

First 10 documents are included in the plan, NZD \$1.5 per additional document.

**Let's get started**

**Please enter your email**

→

☐ I want to receive updates on any new features and services by email.

By clicking Continue, you agree to Secured Signing's [Privacy Notice](#) and [Terms & Conditions](#).

▶ **Continue**

3. Enter your Account Details as required. When ready, click *Register*.

Secured Signing

Plan Details

2 Account Setup

Secured Signing welcomes finPOWER customers

finPOWERCONNECT

Fill out your account details

Name

First Name

Middle Name

Last Name

Company

Job Title

Street Address

City

Postcode

Country

State

Phone

+ Country Code

Area Code

Phone

Password

Confirm Password

Which industry are you in?

Membership Code

Register

Order Summary

[Change Plan](#)

Users	1
Documents	First 10 documents are included, \$1.5 per additional document.
Payment Plan	Pay As You Go
Cost Starts At	NZD \$'

Frequently Asked Questions

▶ What is a Pay As You Go Plan?

▶ Can I add or remove documents or users as I need them?

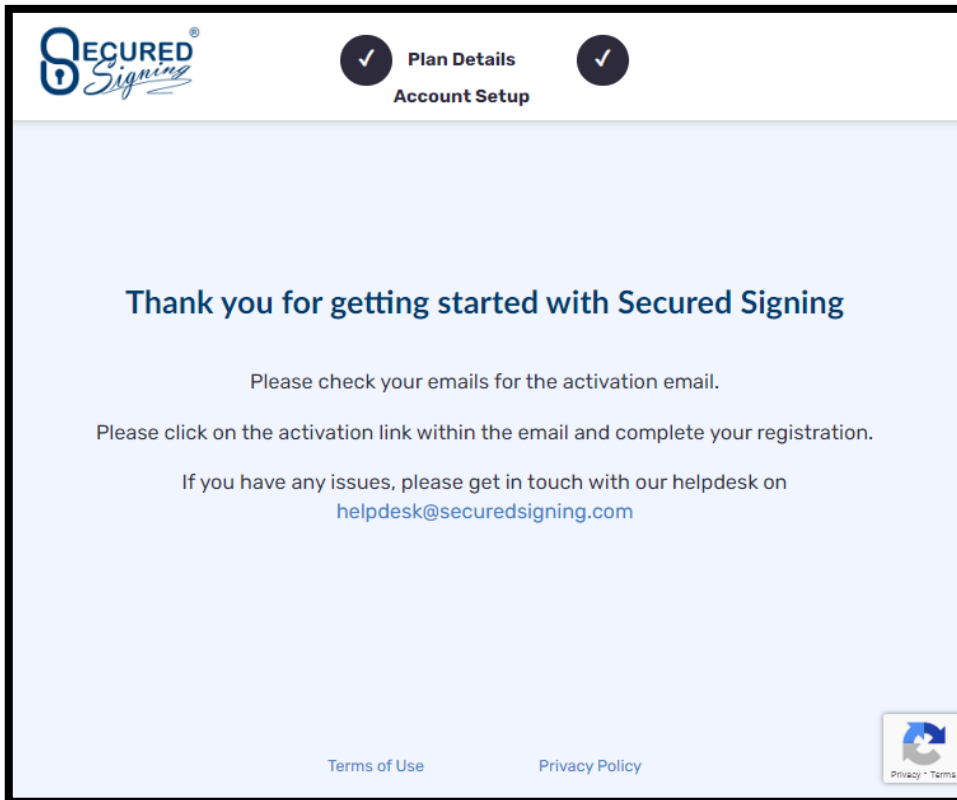
▶ Can I cancel or change plans at any time?

▶ How can I pay for Secured Signing?

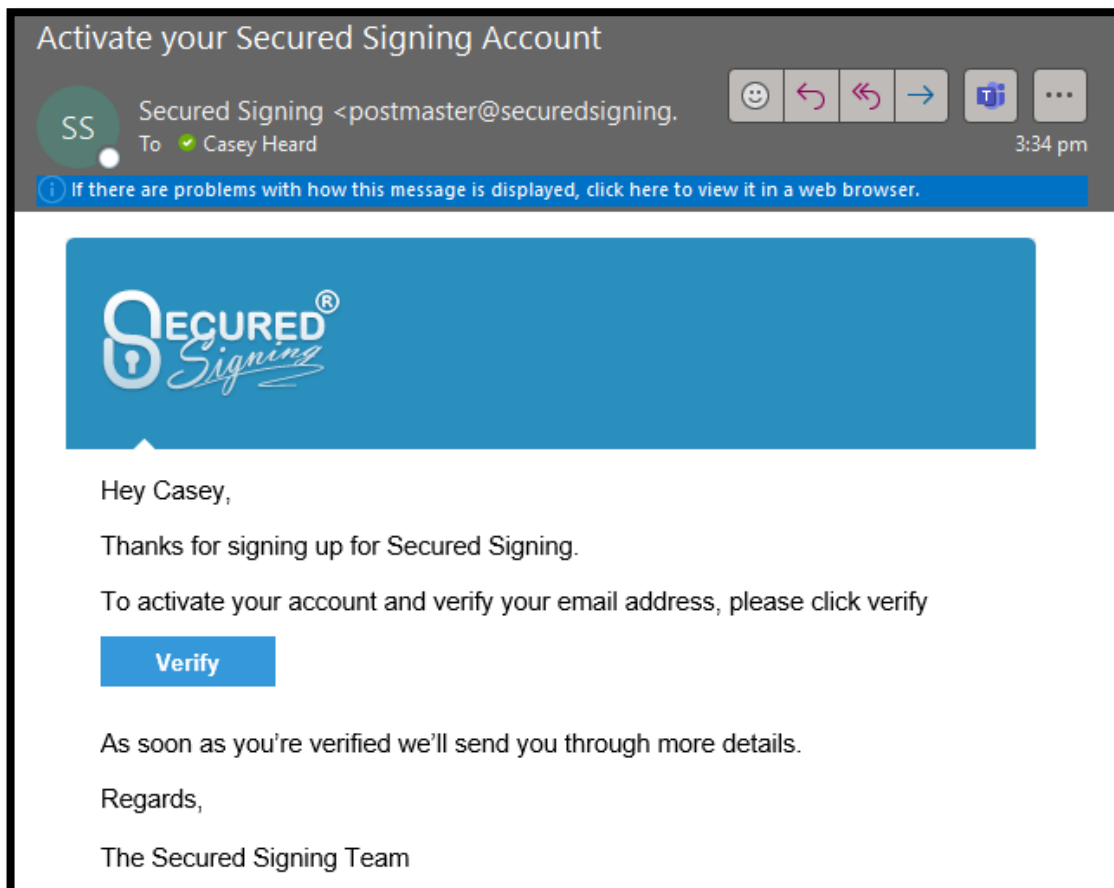
▶ Do the people I send documents for signature need to pay anything?

Page | 7

4. You will see the below screen.



5. Go to your email inbox to find the Secured Signing Verification email. Click 'Verify.'

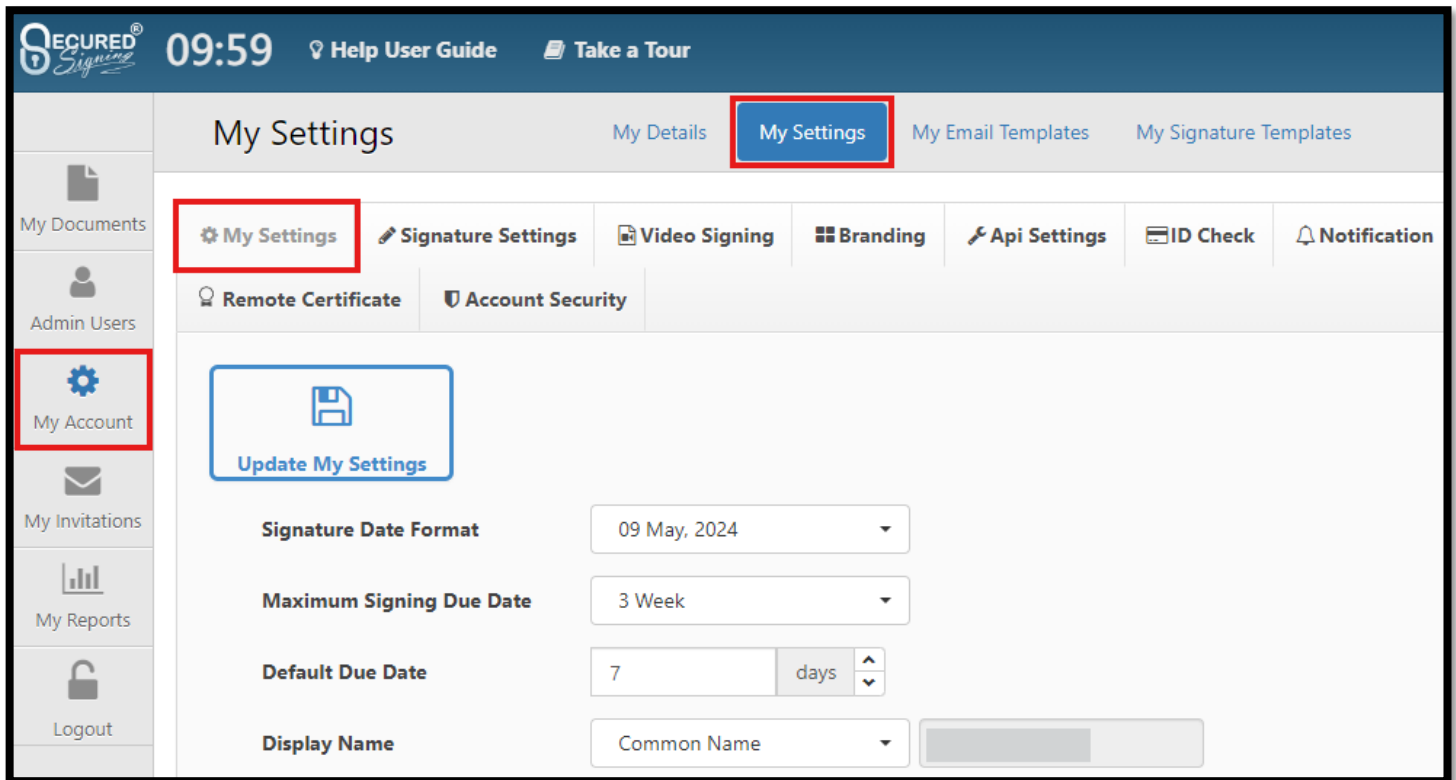




6. You will be directed to the below screen, Log-in to Verify your account.

The screenshot displays a mobile application interface for account activation. At the top, a dark blue header contains a menu icon, the 'SECURED Signing' logo, and the time '15:46'. The main content area is light gray and features a circular profile icon placeholder. Below this is the text 'Login to activate your account'. The login form consists of two input fields: the first contains a placeholder email address ending in '@intersoft.co.nz', and the second is a password field represented by dots. To the right of each input field is a red arrow icon. A prominent blue button with the text 'Activate' is highlighted by a red rectangular border. At the bottom left of the form, there is a link that says 'Forgot password?'.

- Go to 'My Account' → My Settings → My Settings → scroll down the page to find the setting "Invitee Allows Decline". Switch this to 'On'.



**SECURED<sup>®</sup> Signing** 09:59 [Help User Guide](#) [Take a Tour](#)

**My Settings** [My Details](#) [My Settings](#) [My Email Templates](#) [My Signature Templates](#)

[My Documents](#) [My Account](#) [Admin Users](#) [My Invitations](#) [My Reports](#) [Logout](#)

[My Settings](#) [Signature Settings](#) [Video Signing](#) [Branding](#) [Api Settings](#) [ID Check](#) [Notification](#)

[Remote Certificate](#) [Account Security](#)

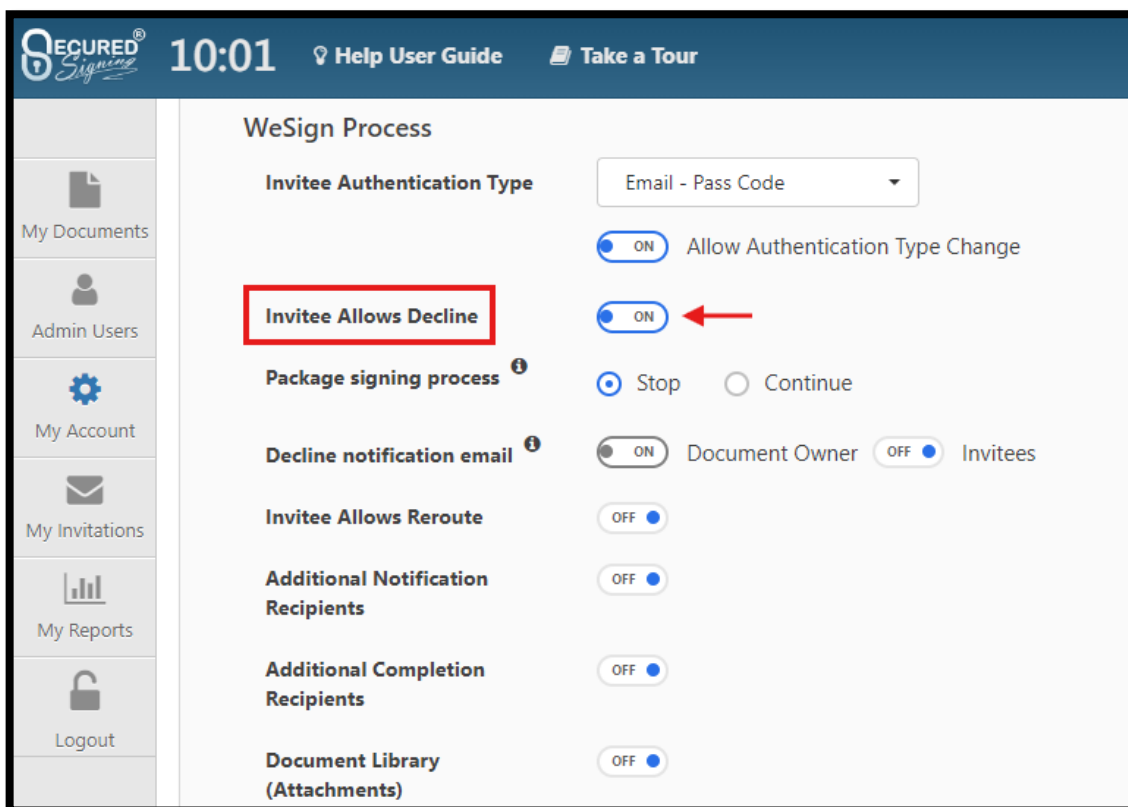
[Update My Settings](#)

**Signature Date Format** 09 May, 2024

**Maximum Signing Due Date** 3 Week

**Default Due Date** 7 days

**Display Name** Common Name



**SECURED<sup>®</sup> Signing** 10:01 [Help User Guide](#) [Take a Tour](#)

**WeSign Process**

**Invitee Authentication Type** Email - Pass Code

**Invitee Allows Decline** ☒ ON

**Package signing process** ☒ Stop ☐ Continue

**Decline notification email** ☒ ON Document Owner ☐ OFF Invitees

**Invitee Allows Reroute** ☐ OFF

**Additional Notification Recipients** ☐ OFF

**Additional Completion Recipients** ☐ OFF

**Document Library (Attachments)** ☐ OFF

## CREATING AN API KEY AND SECRET

This is the Api Key and Secret that allows finPOWER Connect to communicate with Secured Signing.

For instances where the Secured Signing account holder has more than one database using finPOWER Connect, they will need a new key per database.

1. My Account → My Settings → API Settings → Developer Settings → Click 'Add API Key'.

The screenshot displays the Secured Signing user interface. At the top, the header includes the Secured Signing logo, the time 13:39, and links for 'Help User Guide' and 'Take a Tour'. The main navigation bar shows 'My Settings' (highlighted with a red box), 'My Email Templates', and 'My Signature Templates'. Below this, a sub-navigation bar contains 'My Settings', 'Signature Settings', 'Video Signing', 'Branding', 'Api Settings' (highlighted with a red box), 'ID Check', and 'Notification'. The 'My Account' link in the left sidebar is also highlighted with a red box. Under 'Api Settings', the 'Developer Settings' link is highlighted with a red box. In the 'Developer Settings' section, there are two buttons: 'Update Api Settings' and 'Add Api Key' (highlighted with a red box and a red arrow pointing to it). Below these buttons, a message states 'Api Documentation found [here](#)'. A large grey box at the bottom contains the text: 'Click the 'Add Api Key' above for access to the API'.

2. Change the Name to something more identifiable → Click 'Update Api Settings'.

Where there is more than one database, we suggest naming each Api Key after the specific database.

Note: The API Key and Secret shown here is what you will need to enter in finPOWER Connect for configuration.

The screenshot shows the 'My Settings' page in the finPOWER Connect interface. The left sidebar contains navigation links: My Documents, Admin Users, My Account, My Invitations, My Reports, and Logout. The top header shows the time 13:53 and links to Help User Guide and Take a Tour. The main content area is titled 'My Settings' and includes tabs for My Details, My Settings (active), My Email Templates, and My Signature Templates. Below these are sub-tabs: My Settings, Signature Settings, Video Signing, Branding, Api Settings (active), ID Check, and Notification. The 'Api Settings' sub-tab is further divided into 'Connected Apps' and 'Developer Settings'. The 'Connected Apps' section shows a list of connected applications. The 'Developer Settings' section shows the 'finPOWER Connect' configuration form. The form includes fields for Name, API Key, Secret, OAuth 2, Callback, Access Urls, Add Url, and Remove Api Key. The 'Update Api Settings' button is highlighted with a green box, and the 'Add Api Key' button is highlighted with a green box. A green arrow points from the 'Update Api Settings' button to the 'finPOWER Connect' configuration form. The 'finPOWER Connect' configuration form is highlighted with a red box. The form contains the following fields and values:

- Name:** finPOWER Connect
- API Key:** 00000 [redacted] 0000000000
- Secret:** wF9fd [redacted] /u1cevPc8G
- OAuth 2:** ON
- Callback:** OFF
- Access Urls:** Nothing selected
- Add Url:** [empty field]
- Remove Api Key:** [red X button]

## CONFIGURATION IN FINPOWER CONNECT

1. Firstly, you are going to need your API Key and Secret from your Secured Signing account.
  - If you have already made these, you can find them in your Secured Signing account. My Account → My Settings → API Settings → Developer Settings
  - If you haven't already made an Api Key in your Secured Signing account, refer to page 12 of this User Guide.

The screenshot shows the 'My Settings' page in the Secured Signing application. The top navigation bar includes the 'Secured Signing' logo, the time '09:02', and links for 'Help User Guide' and 'Take a Tour'. The main content area is titled 'My Settings' and includes tabs for 'My Details', 'My Settings' (active), 'My Email Templates', and 'My Signature Templates'. Below these are sub-tabs for 'My Settings', 'Signature Settings', 'Video Signing', 'Branding', 'Api Settings' (active), 'ID Check', and 'Notification'. The 'Developer Settings' section is expanded, showing 'Connected Apps' and 'Developer Settings'. The 'finPOWER Connect' app is listed with fields for 'Name', 'API Key', and 'Secret'. The 'API Key' and 'Secret' fields are highlighted with a red box and red arrows pointing to them. The 'API Key' field contains '00000Q0T' and 'W0000000000'. The 'Secret' field contains 'wF9fvd1i3' and '/u1cevPc8G'. Below these fields are toggle switches for 'OAuth 2' (ON) and 'Callback' (OFF), a dropdown for 'Access Urls' (Nothing selected), an 'Add Url' input field, and a 'Remove Api Key' button.

- Go to *Admin* → *Global Settings* → *Secured Signing*, Credentials tab → Click the Pencil to enter Edit mode.

**Cost Centres**

**GLOBAL: Global Cost Centre**  
Global Cost Centre

GLOBAL [dropdown] [refresh] [edit] [add] [delete]

- General
- Adobe Sign
- APLYiD
- Centrix NZ
- ClickSend
- Credit Sense
- DocuSign
- Equifax NZ
- illion BankState...
- illion New Zealand
- InfoAgent
- MotorWeb NZ
- NZ Government
- RealAML
- Secured Signing**
- Twilio
- TxtStream
- Zepto NZ
- Usage
- Audit
- Reports**
  - Print
  - List
  - Analysis
- Utilities**
  - Export
  - Import

**Does this Cost Centre define Secured Signing details?**

☒ Use Service?

If you are not already registered at Secured Signing click the button to Sign Up.

[Sign Up](#)

**Define the service Request URL.**

Request URL:

**Define the User Credentials.**

Key:

Secret Key:

**Authentication Details.** ⓘ

Authentication URL:

Authentication Token:  [refresh](#)

[Verify](#)

**Optionally define the Callback URL to handle events.** ⓘ

Callback URL:

**Credentials** | Test Credentials | Options

3. Tick the setting, 'Use Service?'.

GLOBAL: Global Cost Centre

Global Cost Centre

GLOBAL

General

Adobe Sign

APLYiD

Centrix NZ

ClickSend

Credit Sense

DocuSign

Equifax NZ

illion BankState...

illion New Zealand

InfoAgent

MotorWeb NZ

NZ Government

RealAML

Secured Signing

Twilio

TxtStream

Zepto NZ

Usage

Audit

Reports

Print

List

Analysis

Utilities

Export

Import

Does this Cost Centre define Secured Signing details?

☒ Use Service?

If you are not already registered at Secured Signing click the button to Sign Up.

Sign Up

Define the service Request URL.

Request URL:

Define the User Credentials.

Key:

Secret Key:

Authentication Details. ⓘ

Authentication URL:

Authentication Token:

Verify

Optionally define the Callback URL to handle events. ⓘ

Callback URL:

Credentials

Test Credentials

Options

4. Enter the (API) Key and Secret Key taken from your Secured Sign account. Exit Edit mode by clicking the Save button.

### GLOBAL: Global Cost Centre

Global Cost Centre

GLOBAL

- General
- Adobe Sign
- APLYiD
- Centrix NZ
- ClickSend
- Credit Sense
- DocuSign
- Equifax NZ
- illion BankState...
- illion New Zealand
- InfoAgent
- MotorWeb NZ
- NZ Government
- RealAML
- Secured Signing**
- Twilio
- TxtStream
- Zepto NZ
- Usage
- Audit
- Reports**
  - Print
  - List
  - Analysis
- Utilities**
  - Export
  - Import

#### Does this Cost Centre define Secured Signing details?

☒ Use Service?

If you are not already registered at Secured Signing click the button to Sign Up.

Sign Up

---

#### Define the service Request URL.

Request URL:

---

#### Define the User Credentials.

Key:

Secret Key:

---

#### Authentication Details.

Authentication URL:

Authentication Token:

Verify

---

#### Optionally define the Callback URL to handle events.

Callback URL:

Credentials / Test Credentials / Options





6. Sign in using your Secured Signing account details; and click "Authorize".

Authenticate

**Enter Authentication details**  
Enter credentials to authorise the Secured Signing service.

**Secured Signing** 15:13

## Authorize

Hi [redacted] **New API Setting** is requesting to access the data in your Secured Signing account and behave on your behalf here. Is that alright with you?

**Requested access:**

- Basic Profile - Fetch information about your Secured Signing account, such as your price plan, account status etc.
- Form Direct - Fetch and send your online Form Direct forms.
- Form Filler - Fill in online forms and sign.
- Smart Tag - Send documents with Smart Tags.

**Authorize** Refuse Not Me



8. Lastly, on the Options tab → Tick to “Enable Electronic Signature?” and adjust the “Signing Due Days” as required.

**GLOBAL: Global Cost Centre**  
Global Cost Centre

GLOBAL [dropdown] [icon]

**Does this Cost Centre define Secured Signing details?**

☒ Use Service?

If you are not already registered at Secured Signing click the button to Sign Up.

[Sign Up](#)

**Electronic Signature Options.**

☒ Enable Electronic Signature? ←

**Secured Signing Options.**

Signing Due Days: [2] ←

**Services List:**

- General
- Adobe Sign
- APLYiD
- Centrix NZ
- ClickSend
- Credit Sense
- DocuSign
- Equifax NZ
- illion BankState...
- illion New Zealand
- InfoAgent
- MotorWeb NZ
- NZ Government
- RealAML
- Secured Signing**
- Twilio
- TxtStream
- Zepto NZ
- Usage
- Audit
- Reports**
  - Print
  - List
  - Analysis
- Utilities**
  - Export
  - Import

**Options Tab:** Credentials | Test Credentials | **Options**

## TEST CREDENTIALS

To acquire testing credentials, complete the steps found in this guide on Pages 12 to 21, but using the simple changes listed below.

- When making your Secured Signing (Test) account, use the web link below.  
<https://www.dsx.co.nz/>
- Enter your test account API Key and Secret in the Test Credentials tab.

**GLOBAL: Global Cost Centre**  
Global Cost Centre

GLOBAL [dropdown] [icon] [icon]

Does this Cost Centre define Secured Signing details?  
☒ Use Service?  
 If you are not already registered at Secured Signing click the button to Sign Up.  
 Sign Up

Define the service Request URL.  
 Request URL:

Define the User Credentials.  
 Key:   
 Secret Key:

Authentication Details. ⓘ  
 Authentication URL:   
 Authentication Token:  [refresh icon]  
 Verify

Optionally define the Callback URL to handle events. ⓘ  
 Callback URL:  [copy icon]

Tab bar: Credentials | **Test Credentials** | Options

- Make sure your database is in Test Mode prior to testing sending documents.

User Preferences for Administrator (ADMIN)

**Cost Centres**  
Cost Centre settings.

General [dropdown] [icon]

Use Test or Production Mode for Service Requests?  
☒ Test Mode?  
☐ Production Mode?

Options.  
☒ Warn User prior to incurring a fee?  
☐ Show applicable Services for all Countries?

Left sidebar menu: Database, Documents and ..., External Party, Formatting, Internet, Message Handler, Performance, Reporting, Search, Spelling, User Interface, Constants, Audit, Accounts, Account Appli..., Clients, Cost Centres, General

## UPDATING YOUR DOCUMENTS

For Documents in finPOWER Connect to use Electronic Signing of any sort, they require additional scripting and “E.Signature” (electronic signature) blocks in the document template.

If you require help setting up a Document, contact your Intersoft Dealer or refer to the following section in our online Help.

<http://help.intersoft.co.nz/fin4.0.4/index.htm#XElectronicSignatures.DocumentConfig>

## WEBHOOK CALLBACK FUNCTIONATILITY

### OVERVIEW

Webhooks are used to automatically update finPOWER Connect when the status of a Document changes.

This functionality can be found in finPOWER Connect version 3.04.02 onward.

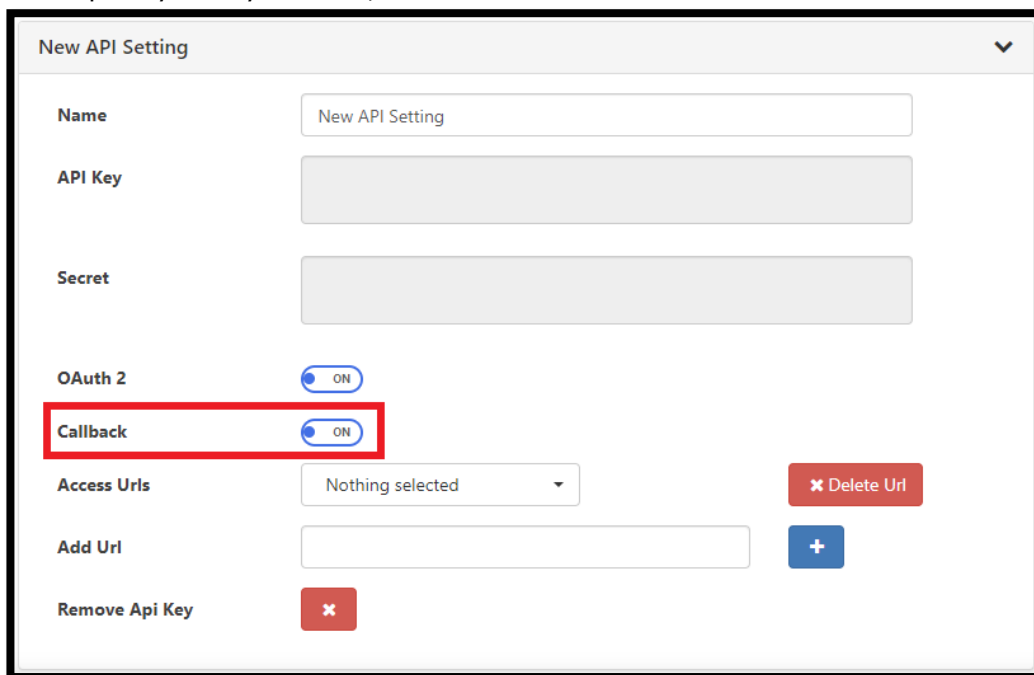
To use the Webhook Callback functionality would require the Web Services and Automation module, as this is what will be receiving updates automatically. For further information on Web Services configuration, please refer to the Web Services Configuration & Installation guides found on our website.

<https://www.intersoft.co.nz/Download/Default.aspx?category=Support&q=web+services>

### SETTING UP WEBHOOK CALLBACK FUNCTIONALITY

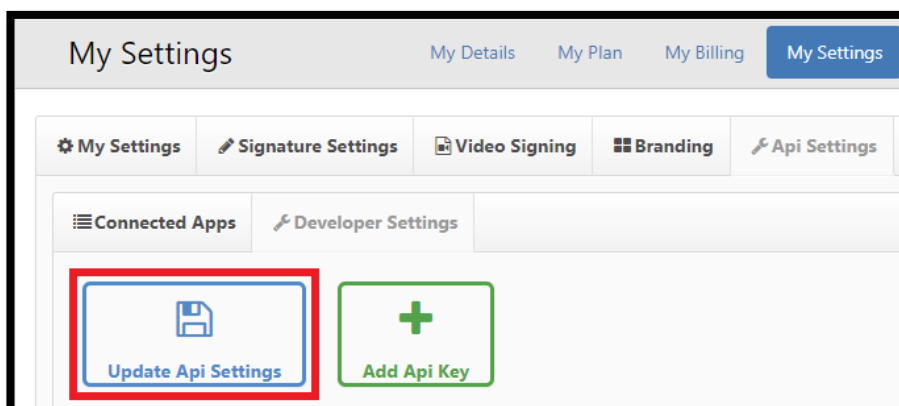
1. First you need to enable Callbacks in the Secured Signing portal.

By going to your Secured Signing Account → My Settings → Api Settings → Developer Settings → On each Api Key that you have, switch 'Callback' to On.



The screenshot shows the 'New API Setting' form. It includes fields for Name, API Key, and Secret. Below these are toggle switches for OAuth 2 and Callback, both of which are currently turned 'ON'. The Callback toggle is highlighted with a red rectangular box. There are also sections for Access Urls, Add Url, and a Remove Api Key button.

Click 'Update Api Settings'.



The screenshot shows the 'My Settings' page with tabs for My Details, My Plan, My Billing, and My Settings. Under the My Settings tab, there are sub-tabs for My Settings, Signature Settings, Video Signing, Branding, and Api Settings. The Api Settings sub-tab is selected. Below it, there are two buttons: 'Update Api Settings' (highlighted with a red box) and 'Add Api Key' (highlighted with a green box).

2. Now going to finPOWER Connect → Admin, Cost Centre → Secured Signing page → Credentials.

- If the Callback URL already has your WebService URL, leave as is.

This will be because you already have defined your Webservice's Base URL in Global Settings → Web.

- If the Callback URL does not contain your WebService URL, whilst in Edit Mode, right click on the Callback URL and Paste Hint.

Replace the circled portion of the pathway with your WebService URL.

Making sure to include **http://** at the beginning and **/api** at the end of your URL's the pathway, like in the example. Click Save.

Cost Centres (Edit)

**GLOBAL: Global Cost Centre**  
Global Cost Centre

GLOBAL

General  
Adobe Sign  
APLYiD  
Centrix NZ  
ClickSend  
Credit Sense  
DocuSign  
Equifax NZ  
illion BankSta...  
illion New Zeal...  
InfoAgent  
MotorWeb NZ  
NZ Governm...  
RealAML  
Secured Signi...  
Twilio  
TxtStream  
Zepto NZ  
Usage  
Audit  
Reports  
Print  
List  
Analysis  
Utilities

Does this Cost Centre define Secured Signing details?  
☒ Use Service?  
If you are not already registered at Secured Signing click the button to Sign Up.  
Sign Up

Define the service Request URL.  
Request URL:

Define the User Credentials.  
Key:   
Secret Key:

Authentication Details.  
Authentication URL:   
Authentication Token:   
Verify

Optionally define the Callback URL to handle events.  
Callback URL:

Credentials Test Credentials Options