

Introduction

This Document explains the Contractor's Cloud / Signeato Integration. All billing will operate normally between you and Signeato.

Signeato is an electronic signature app that allows you to digitally upload a pdf, designate signees, and send the document out for signatures. Once, all signatures have been captured, the signed document will be emailed to all parties and uploaded to the Signeato folder within the projects Files area.

Integrating Signeato

First, you must create an account within Signeato. This can be done a <https://www.signeato.com>. More often than not, Signeato has promotions where you can try it out for free. Once you have logged into Signeato, keep the browser tab open while you log into Contractor's Cloud within a new browser tab or window.

Integration with Signeato is done within the Integration Dashboard. You will need to have the Primary account credentials for your Signeato Account in order to Integrate with Contractor's Cloud.

Menu Bar → Corporate Settings → Integrations

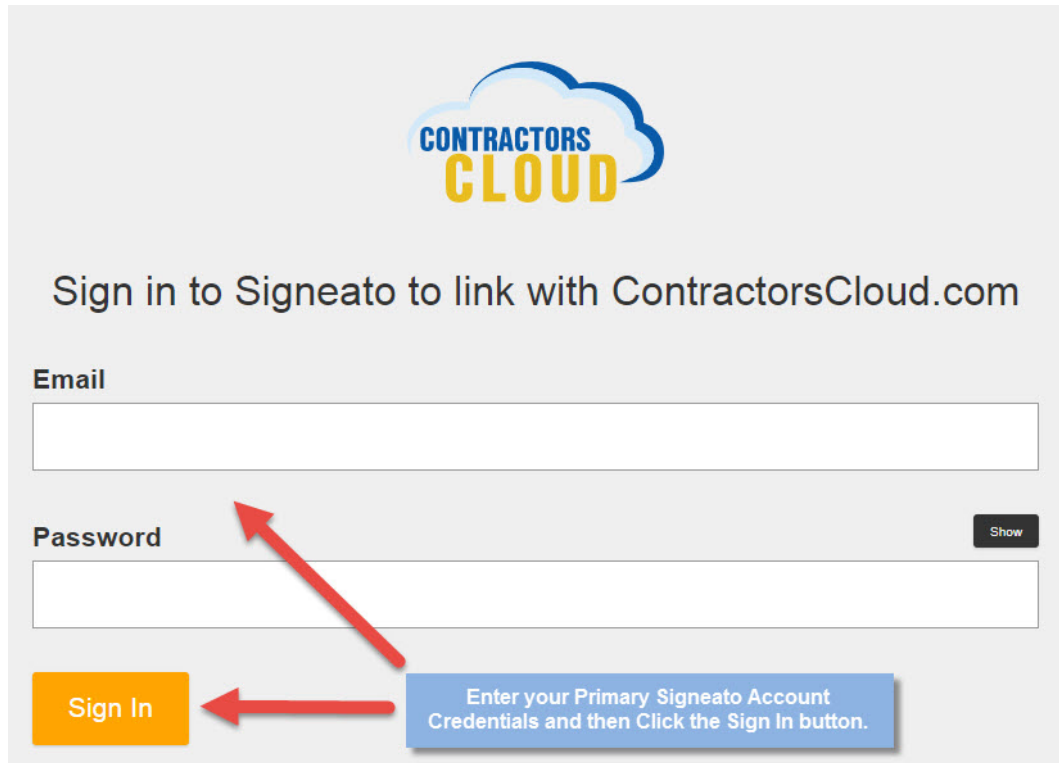
While in the Integration Dashboard select the Signeato Option from the Integration List



The screenshot shows the Contractor's Cloud interface. At the top, the menu bar includes 'Dashboard', 'Projects', 'Contacts', 'Corporate Settings', and 'Settings'. A red arrow points from 'Settings' to a callout box that says 'Select Corporate Settings then Integrations to Access the Integration Dashboard'. Below the menu bar, the 'INTEGRATIONS' section is visible on the left, listing various services: CompanyCam, Dropbox, EagleView, Google Calendar, HailWATCH, HailStrike, Quickbooks, Signeato, and Swyft Mobile. A red arrow points from 'Signeato' to a callout box that says 'Select the Signeato option from the Integration List'. To the right of the list, the Signeato logo is displayed. Below the logo, a message states: 'Signeato is a digital signature app that allows you to digitally upload a pdf, designate signees, and send the document out for signatures. Once, all signatures have been captured, the signed document will be emailed to all parties and uploaded into the projects Files area.' Below this, the heading 'You are not integrated with Signeato' is followed by 'Instructions'. The instructions list four steps: 1. Log in to your Signeato account, 2. Click this button → [Authorize] button, 3. On the next page, click the "Allow" button, and 4. [Click Here] to refresh this page. A red arrow points from the 'Authorize' button to a callout box that says 'Click on the Authorize button to open the Signeato Authorization Window'.

Click on the **Authorize** button to open the Signeato Login Window.

Enter your Signeato Login credentials to proceed to the next page.



The screenshot shows the ContractorsCloud login page. At the top is the ContractorsCloud logo. Below it is the text "Sign in to Signeato to link with ContractorsCloud.com". There are two input fields: "Email" and "Password". A red arrow points from the "Sign In" button to the "Password" field. Another red arrow points from a blue instruction box to the "Sign In" button. The instruction box contains the text: "Enter your Primary Signeato Account Credentials and then Click the Sign In button."

Once you entered in your Login information a new window will open, click on the **Allow** button to finish the integration.



The Signeato Integration will now be updated to show a successful integration. You can Revoke your integration with Signeato at anytime by clicking on the Revoke button.



After you successfully integrate with Signeato, you will see a Signeato Button in throughout your projects for any PDF document you wish to sign. *Note: Only Users that have the permission to send for signing will see the Signeato button in projects.*

You can Revoke your integration with Signeato at anytime by clicking on the Revoke button.

Set Permissions

Within Contractor's Cloud, you can allow only specific Corporate Users the ability to send PDF files to Signeato. Head to your Corporate User Dashboard to turn the permission on for those Users.

Menu Bar → Corporate Settings → Users → Pick User → Permissions → Process Permissions → Integration Permissions

Hide all payout/commission data	<i>This permission hides all payout/commission data within a project.</i>	<input type="button" value="ON"/> <input type="button" value="OFF"/>
Financial Permissions - QuickBooks		
Is Quickbooks Administrator	<i>This permission gives this user to sync data between Contractor's Cloud and Quickbooks Desktop Edition.</i>	<input type="button" value="ON"/> <input type="button" value="OFF"/>
Integration Permissions		
Can change CompanyCam Places within projects.	<i>Can change CompanyCam Places within projects.</i>	<input type="button" value="ON"/> <input type="button" value="OFF"/>
Can order Eagleview Reports		<input type="button" value="ON"/> <input type="button" value="OFF"/>
Can Order Signeato Signatures		<input type="button" value="ON"/> <input type="button" value="OFF"/>
Is Eagleview Administrator		<input type="button" value="ON"/> <input type="button" value="OFF"/>
Jet Stream Permissions		

Can Order Signeato Signatures: Turn this permission **ON** for the Users that are allow to order Signeato Signatures.

Ordering Signeato Signatures

Once integrated, any user that has the permission to order Signeato signatures will see new buttons appear within your projects. Clicking on the Sign It! Button will send the Estimate, Proposal Document, Proposal, Completion Certificate, or PDF to Signeato where the PDF is signed and when finished, will automatically update back into the project.

Example of the Proposal tab found within a project after Integration.

CONTRACTORS CLOUD #15-KC26 - test, billy Project Status: Inspection/Demo [Talk to adjustor](#) Global S

CUSTOMER ACCOUNT [Edit](#)

1100 abby ave
Annandale, MN 55302
test, billy
ID: 397836
[Open Customer Portal](#)
Mon, May 22 2017, 03:10 PM
Wed, Sep 07 2016, 04:34 PM

PROJECT CONTACTS [Edit](#)

Billy (tester guy) Test
(H) (555) 555-5555
(C) (555) 555-3453
(E) cnoling@contractorscloud.com

PROJECT TEAM [Edit](#)

Sales Representative	Clint Noling
Project Manager	Scott Jones
Sales Manager	Bruce Banner
Production Manager	Steve Rogers
In-House Adjustor	Lance Armstrong
Project Administration	Levi Hoyt

PROJECT DETAILS

Lead & Site Information [Edit](#)

PROJECT NAME
EagleView Test
LEAD SOURCE
Canvassing - Swift
ESTIMATED PROJECT VALUE
\$10,000.00
ESTIMATED CLOSE PROBABILITY
70.000%
ESTIMATED CLOSE DATE
12/18/15
APPOINTMENT SCHEDULING

Training [NOTES](#) [JET STREAM](#) [WORKFLOW](#) [TASKS](#) [CALENDAR](#) [CLAIMS](#) [PROPOSALS](#) [CONTRACTS/ORDERS](#) [PHOTOS](#) [COMPANYCAM](#) [EAGLEVIEW](#) [SWIFT](#) [FILES](#) [DROPBOX](#) [MAP](#) [STATISTICS](#) [QUICKBOOKS](#) [REFRESH](#) [CLOSE](#)

Order Pre-Build [Add](#) [?](#)

Trade	Description
Roofing	testbuild
Roofing	roofing

[Order Preview / Export](#)

Estimates [Add](#) [-- Import Estimate from Another Project --](#) [?](#)

Date	Estimate #	Description	Type	Total	Status	
No Category						
02/24/17	EST15-KC26-1	Estimate - Retail (Per Unit), Roofing-02/24/17	Estimate - Retail (Per Unit)	\$28740.00	Active	Sign It!

Proposal Documents [Add](#) [?](#)

[Create Document](#) [or Pick to Import Template](#)

Date	Description	Type	Creator	Status	
12/04/15	Appraisal Letter	Add Page	Clint Noling	Active	Sign It!
12/11/15	Introductory Sales Letter	Add		Active	Sign It!
04/28/16	Welcome Letter	Sec		Active	Sign It!

Albums [Add](#) [?](#)

Date	Description	Sharing	Status
12/07/15	Customer Test Album	Shared on Customer Portal	Active
02/09/16	Test		Active
04/28/16	After Pictures.		Active
04/28/16	Before Album		Active

Proposals [Add](#) [?](#)

Date	Proposal #	Description	Creator	Value	Status	
12/14/15	PROLead-1	Test Prop	Clint Noling	\$0.00	Active	Sign It!
03/31/16	PRO15-KC26-2	Total Proposal	Clint Noling	\$0.00	Active	Sign It!
04/28/16	PRO15-KC26-3	Brand New Proposal	Clint Noling	\$28,740.00	Active	Sign It!

Click on the Sign It! button within the Proposals tab to send Estimates, Proposal Documents, and Proposals to Signeato for Signature(s)

Example of the Completion Certificate tab found in the Contracts/Orders tab of a Project.

CONTRACTORS CLOUD #15-KC26 - test, billy Project Status: Inspection/Demo [Talk to adjustor](#)

CUSTOMER ACCOUNT [Edit](#)

1100 abby ave
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test, billy
ID: 397836
[Open Customer Portal](#)
Mon, May 22 2017, 03:10 PM
Wed, Sep 07 2016, 04:34 PM

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In-House Adjustor Lance Armstrong
Project Administration Levi Hoyt

PROJECT DETAILS

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PROJECT NAME
EagleView Test
LEAD SOURCE
Canvassing - Swyft
ESTIMATED PROJECT VALUE
\$10,000.00
ESTIMATED CLOSE PROBABILITY
70.000%
ESTIMATED CLOSE DATE
12/18/15
APPOINTMENT SCHEDULING
Sent to Appointment Scheduler
EVENT
Oklahoma, Oklahoma City, 08/01/11
SITE TYPE
Residential-Own
SITE ADDRESS
11276 abby ave
Oklahoma City, OK 55308
LAT/LONG
35.355690, -97.550039

Company Custom Fields [Edit](#)

Roofing:
Trades Needed:
Date Of Damage To Structure:
Questions Filled In Below Are For Sales Only:
Insurance Paperwork Filled:
Date Of Loss:

Training **NOTES** **JET STREAM** **WORKFLOW** **TASKS** **CALENDAR** **CLAIMS** **PROPOSALS** **CONTRACTS/ORDERS** **PHOTOS** **COMPANYCAM** **EAGLEVIEW** **SWYFT** **FILES** **DROPBOX** **MAP** **STATS**

[Add Contract](#) [Print Statement](#) [Email Statement](#) ☐ In Collections

Test-insurance Proceeds-12/04/15

Type: Insurance Proceeds [Update Details](#) [Upload Files](#)
Contract Rep: Bill Shoquist [Delete Contract](#)
Contract Date: 12/04/15 [View Claim Info](#)
Claim: 345567 [Sync with Quickbooks](#)
Last Quickbooks Sync:
Contract Approval: Tue, Mar 07 2017, 11:10 AM

[Invoices/Payments](#) [Expenses/Orders](#) [Profit & Loss](#) **[Completion Certificates](#)**

Homeowner Certificate of Completion (HCOC)

COMPLETION CERTIFICATE DATE: 01/19/16
COMPLETION CERTIFICATE COMMENT:

[Print Completion Certificate](#) [Email Completion Certificate](#) **Sign It!**

Insurance Certificate of Completion (ICOC)

COMPLETION CERTIFICATE DATE: 02/08/16
COMPLETION CERTIFICATE COMMENT:

COMPLETION CERTIFICATE

-- Import Items from Invoice --

Item	Amount
	\$0

[Print ICOC \(Letter Format\)](#) [Email ICOC \(Letter Format\)](#) **Sign It!** [Print ICOC \(Invoice Format\)](#) [Email ICOC \(Invoice Format\)](#)

Click on the Sign It! button to Send Completion Certificates for Signatures

Example of the Files tab with a PDF file that is eligible to be sent for signatures.

CONTRACTORSCLOUD #15-KC26 - test, billy Project Status: Inspection/Demo [Talk to adjustor](#)

CUSTOMER ACCOUNT [Edit](#)

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PROJECT CONTACTS [Edit](#)

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(H) (555) 555-5555
(C) (555) 555-3453
(E) cnoling@contractorscloud.com

Folder: -- Pick Folder -- Attach To: -- Nothing to Attach To -- [Upload Files](#)

Drag and drop files into folders.

Filename	Date	Portal
Contract		
sanddune_1.jpeg , Test-insurance Proceeds-12/04/15	05/31/16	Edit File
ACH Auth Form.pdf	07/10/17	Edit File Sign It!
Estimates/Proposals		
suppliers_160104.csv		Edit File
Expense/Credit		
Material Order		
Material Order Returns		
Payment		

Click the Sign It! button to send any uploaded PDF file for Signatures

Example of the General Files Uploads dashboard with an eligible PDF that can be sent for signatures.

Menu Bar → Reports & Files → General Files Uploads

CONTRACTORSCLOUD

Dashboard Projects Contacts Corporate Settings My Settings Help Reports & Files [Select Reports & Files then General Company Files to Access](#)

CURRENT COMPANY [i](#)

Super Mega Corp

[Add Files](#) [Folders](#)

File Name	Description	Upload Date		
Contract Files				
20130323Email_2974531.pdf		07/10/17	✎ ✕	Sign It!
LocalParadeLetter2015_799950.docx		05/29/15	✎ ✕	
Sample Contract 1.doc	Sample C	12	✎ ✕	
Gutters				
Maps				
Material Order Files				

Click the Sign It! button to send Uploaded Company Files for Signatures

- End of Document -