

QuantaCade

QC Digital Signature

User Walkthrough

A plain-language setup and daily-use guide for Joomla administrators and registered users

QC Digital Signature gives registered Joomla users a private area to create reusable templates, send secure signature requests, track email delivery and signer progress, and download completed PDFs with an appended Audit Trail. Administrators manage licensing, sender identity, optional group request limits, and the frontend presentation.

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www.quantacade.com

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1. What QC Digital Signature does

QC Digital Signature is a Joomla electronic-signature extension for administrators, registered users, and external signers. Registered users who can access the frontend application receive a private signing area where they can maintain Contacts, create reusable Templates, send requests, monitor delivery and signer progress, and retrieve completed documents.

Core capabilities

- Give registered Joomla users their own private signature-request area without exposing shared workspace or team-management complexity.
- Create reusable Templates from PDF, DOC, and DOCX files.
- Prepare multi-page documents in a visual builder with movable and resizable fields.
- Use saved Contacts with one or more email addresses while keeping one Contact as one signer identity.
- Send secure no-login signing invitations immediately when a request is sent.
- Track invitation delivery separately for every saved email address.
- Track Unsigned and Completed requests, including viewed and signed timestamps.
- Send automatic reminders, manual reminders, cancellation notices, completion notices, and completed-document resends.
- Correct a failed email address without recreating the request or changing unrelated Contact addresses.
- Create one protected, immutable completed PDF with an appended Audit Trail.
- Use automatic 24-hour license revalidation and package-shaped Joomla updates.

Plan	What it adds
Basic	One active Contact and one active Template per registered user, plain-text Email Templates, and the complete core signing workflow.
Pro	Up to three active Contacts and three active Templates per registered user, plus HTML Email Templates.
Max / All Access	Unlimited Contacts and Templates per registered user, plus optional monthly request allowances by Joomla user group.

Current release scope

QC Digital Signature 1.01.06 includes the accepted template, builder, request, delivery, recipient-correction, signer, reminder, completion, protected-PDF, licensing, and group-limit workflows. File Upload fields, scheduled sending, persistent request drafts, shared workspaces, team collaboration, and document-library interfaces are not part of the current customer-facing release.

2. Before you begin

Requirements

Item	Requirement
Joomla	A supported Joomla 5.4 or Joomla 6 site. Confirm compatibility on the intended hosting environment before production use.
PHP	PHP 8.3 or later, with the extensions required by Joomla and the selected document-conversion method.

Item	Requirement
Administrator access	A Joomla administrator account with permission to install extensions, configure QC Digital Signature, manage updates, and review Scheduled Tasks.
Registered users	Joomla user accounts that can access the frontend QC Digital Signature menu item. Each eligible user is provisioned a private signing area automatically.
Joomla mail	A tested Joomla mail configuration. Invitation and completion messages are attempted immediately, while automatic reminders use a Scheduled Task.
HTTPS	A valid HTTPS connection is strongly recommended for frontend users and signers.
Private storage	A writable protected storage location outside the public Joomla document root. QC Digital Signature manages source documents, snapshots, and completed PDFs through application-controlled delivery.
QuantaCade license	A valid license key for activation, updates, support, feature-tier recognition, and automatic 24-hour revalidation.
Document conversion	PDF works directly. DOC and DOCX require a working server-side conversion provider; PDF is recommended for the first production test.

Recommended preparation

- Confirm the Joomla site time zone and the sender email configured in Joomla.
- Create a frontend menu item for the QC Digital Signature Dashboard and set its access to Registered when all registered users should have access.
- Start with a small, simple PDF before testing DOC or DOCX conversion.
- Use test Contacts and email addresses that you control for the first complete signing cycle.
- Test a two-signer request, including both signer links in the same browser, before opening the service to customers.
- Decide whether Max user-group limits will be used for memberships, customer plans, departments, or paid access.
- Keep email subjects and messages free of private data that does not need to be sent by email.

3. First setup checklist

1. Install the QC Digital Signature package through Joomla Extension Manager.
2. Open Components > QC Digital Signature in the Joomla administrator area.
3. Open Settings, enter the QuantaCade license key, and click Activate / Validate License.
4. Open Status and confirm the installed version, Effective Tier, Last checked, and Next automatic check.
5. Open System > Scheduled Tasks and confirm that QC Digital Signature Automatic Reminders and QC Digital Signature License Revalidation are enabled.
6. In administrator Settings, confirm the global sender name and sender email, or leave them blank to use Joomla Mail From and From Name.
7. On Max or All Access, open User Group Limits and configure monthly request allowances if the site will control or sell signing access by Joomla group.
8. Optionally adjust Frontend Design and Frontend Text before publishing the frontend menu item.
9. Create a frontend menu item using the QC Digital Signature Dashboard view and give it Registered access.
10. Log in as a normal registered user and open the menu item to confirm automatic private-area provisioning.
11. Open frontend Settings, select the account time zone, reminder interval, default expiration, and test the email templates.

12. Create a Contact, create and publish a Template, send a test request, complete it as the signer, and verify the completed PDF and Audit Trail.

4. Administrator area overview

The administrator area controls installation-wide licensing, mail identity, optional usage limits, and frontend presentation. Registered users perform ordinary signing work from the frontend application.

Tab	Purpose
About	Product summary, core capabilities, and current product orientation.
Support	Support Center, QuantaCade account, product page, walkthrough PDF, website, and installation support information.
Status	License status, Effective Tier, last and next license checks, installed version, update-site state, and extension updates.
Settings	License key, global sender name and email, and the current plan limits that apply to every registered user.
User Group Limits	Max/All Access controls for optional monthly signature-request allowances by Joomla user group.
Frontend Design	Shared and per-display frontend colors, surfaces, borders, buttons, spacing, and other visual settings.
Frontend Text	Optional custom heading and explanatory text for active frontend displays.

Plan restrictions and Joomla permissions are different

An Upgrade to Pro or Upgrade to Max pill means the current license tier does not include the action. A Joomla permission denial means the feature may be included in the plan, but the current account is not authorized to perform it.

5. Activate your license and install updates

The license connects the installation to QuantaCade activation, entitlement, update, download, and support services. The recognized Effective Tier controls Contact and Template limits, HTML Email Templates, and Max user-group request limits.

Activate or change the license

- Open QC Digital Signature > Settings in the Joomla administrator area.
- Paste the QuantaCade license key into the License key field.
- Click Activate / Validate License.
- Open Status and confirm that Status and Effective Tier are correct.
- Confirm that Last checked is populated and Next automatic check is approximately 24 hours later.

Automatic license checks

- QC Digital Signature automatically revalidates the saved license every 24 hours.
- Saving a different license key triggers immediate validation.
- The administrator can validate manually at any time.
- Invalid, expired, revoked, or unauthorized licenses fall back to Basic behavior without deleting saved records.

- A temporary network or QuantaCade-service outage preserves the last validated plan until a later automatic check.

Check and install an update

18. Open the Status tab and click Check for Updates.
19. Review Installed version, Available version, and Update site.
20. When an update is available and the administrator has Joomla Extension Manager permission, click Upgrade QC Digital Signature.
21. After the upgrade, clear Joomla and browser caches when a visible interface change does not appear immediately.

Do not post the full license key in screenshots, public tickets, forums, logs, or documentation. The masked key, domain, version, Effective Tier, and Installation UUID are normally enough for support.

6. Give registered users frontend access

QC Digital Signature is designed for registered Joomla users, not only site owners. A registered user who can access the frontend application receives a private signing area automatically. Users do not create, select, switch, or share workspaces.

Create the frontend menu item

22. Open Menus in the Joomla administrator area and select the menu that should contain QC Digital Signature.
23. Create a new menu item and choose the QC Digital Signature Dashboard view.
24. Use a clear menu title such as Digital Signature or Sign Documents.
25. Set Access to Registered when every logged-in user should have access.
26. Publish the menu item and test it with a normal registered account.

Frontend navigation

Tab	What the user does there
Dashboard	Review counts, start a request, reuse a recent Template, and review the current monthly request count.
Requests	Track Unsigned and Completed requests, delivery status, signer activity, reminders, cancellation, downloads, and resends.
Templates	Add, edit, publish, use, duplicate, and delete reusable Templates.
Contacts	Add, edit, and delete saved Contacts with one or more email addresses.
Settings	Set account defaults and edit the emails QC Digital Signature sends.

Private user boundaries

Contacts, Templates, requests, documents, deliveries, and completed PDFs are scoped to the registered user's private area. A public ID or direct URL is not permission to access another user's record.

7. Use the Dashboard

The Dashboard is the registered user's starting point. It summarizes current work without exposing internal technical terms.

Dashboard areas

- **Templates:** the number of active Templates available to the user.
- **Unsigned:** requests that are still waiting for one or more required signers.
- **Completed:** requests whose required signing workflow is finished.
- **Create a signature request:** opens the Template selection and request workflow.
- **Recently used templates:** shows the three most recently used usable Templates, without last-used dates.
- **Requests sent this month:** shows the current calendar-month usage and allowance context.

When the user reaches a Contact, Template, or monthly request limit, the related action remains visible but is disabled with clear plan or usage guidance. Existing records are preserved after downgrade.

8. Configure user Settings and email templates

Frontend Settings belong to the registered user's private signing area. Administrator Settings control the global sender identity; frontend users control their own request defaults and email wording.

Request defaults

Setting	Behavior
Account or organization name	Used as the sender or organization identity in the user's signing area and available email placeholders.
Time zone	Controls local request timing, monthly usage boundaries, displayed dates, and default expiration calculations.
Unsigned request reminder	Selects how often automatic reminder emails are sent while a signer remains incomplete. The default is every 3 days.
Default expiration	Selects the number of days before a new unsigned request expires. The default is 30 days.

Email templates

- **Invitation:** sent immediately to every frozen signer email address when the request is sent.
- **Reminder:** used by automatic and manual reminders for incomplete signers.
- **Cancellation:** sent when an unsigned request is cancelled.
- **Completion:** sent after the final PDF and Audit Trail are created.
- **Completed-document Resend:** used when a completed document is resent from the Completed manager.

Edit and test a template

27. Open frontend Settings and locate Email templates.
 28. Click Edit beside the email you want to change.
 29. Update the Subject and Plain-text message.
 30. On Pro, Max, or All Access, select HTML and complete the HTML message when needed.
 31. Use the displayed placeholders rather than inventing unsupported token names.
 32. Save the Email Template.
 33. Click Send Test to send the rendered template to the currently logged-in Joomla user's email address.
- Basic uses plain text. Pro, Max, and All Access can use plain text or HTML. Existing HTML is preserved after a downgrade but cannot be selected outside an entitled plan.

9. Create and manage Contacts

A Contact represents one signer identity. One Contact may have more than one email address, but those addresses do not create separate signers or consume additional Contact limits.

Contact information

- First name, last name, and preferred name.
- One or more email addresses.
- Optional company, title, phone, time zone, and mailing address.

Add a Contact

34. Open Contacts and click Add Contact.
35. Enter the Contact name and any optional company, title, phone, time zone, or address information.
36. Enter one or more email addresses. Separate multiple addresses with a comma or semicolon.
37. Review the addresses for spelling errors and click Save Contact.

Multiple email behavior

- Addresses are trimmed, validated, deduplicated without regard to capitalization, and kept in their entered order.
- The first valid address is the primary display and PDF email address.
- Every saved address is frozen into a sent request and receives its own invitation, reminder, cancellation, completion, and resend delivery record.
- The Requests manager still shows one signer, with +N more when additional addresses exist.
- Deleting or editing a Contact affects future use but never rewrites a previously sent request.

Basic allows one active Contact per registered user. Pro allows three. Max and All Access allow unlimited active Contacts.

10. Create and manage Templates

A Template combines one unique uploaded document with reusable fields, labels, geometry, text, links, and optional Contact assignments.

Add a Template

38. Open Templates and click Add Template.
39. Enter a clear Template name and optional description.
40. Choose a PDF, DOC, or DOCX file. Each new Template receives its own protected document chain.
41. Submit the popup and wait for the document to be inspected, converted when necessary, and opened in the builder.

Template actions

Action	Behavior
Edit	Opens the current editable successor version. A published or previously used Template remains editable without rewriting older requests.
Use	Starts a new transient request from the current usable published version. Use is disabled until the Template is published.
Duplicate	Creates an independent Template and protected document copy, preserves field geometry and settings, and remaps Signed Date links to the copied fields.

Action	Behavior
Delete	Removes the Template from active use while preserving versions, sent requests, completed PDFs, deliveries, and audit history.

Basic allows one active Template per registered user. Pro allows three. Max and All Access allow unlimited active Templates. Duplicate is subject to the same limit as Add Template.

11. Prepare a document in the visual builder

The builder uses a compact control column beside the PDF. It is designed around field placement, assignment, sizing, validation, and publication without a separate document library or large technical panels.

Builder workflow

42. Open a Template with Edit, or finish adding a new Template.
43. Use the page controls to move between pages of a multi-page document.
44. Click a field button to place it on the current page, or drag it directly onto the PDF.
45. Move and resize the field until it covers the correct document area.
46. Right-click the field to set applicable properties such as Contact assignment, Required, Lock placement, Font size, Label, Text value, or Signed Date link.
47. Use Field Assignment to assign selected signer-controlled fields to a saved Contact.
48. Save changes and use Validate when you want to review blocking issues.
49. Correct red field-level exclamation warnings. Each warning explains what is wrong and how to fix it.
50. Publish Template when the reusable design is ready.

Placement and validation rules

- Unlocked fields can be moved and resized in width and height.
- Lock placement prevents both movement and resizing until the field is unlocked.
- Geometry is stored as normalized page-relative coordinates so it remains stable across page size and zoom changes.
- A field that extends outside the page receives a direct validation warning.
- Contact assignments may be left incomplete in a reusable Template, but every applicable request-time field must be assigned or validly linked before Send.
- Builder controls, resize handles, labels, and validation indicators are not printed into the completed PDF.

12. Understand the nine field types

Field	Who controls it and how it works
Signature	Signer-controlled. Opens typed or drawn signature capture. A required Signature blocks submission until completed.
Initials	Signer-controlled. Opens typed or drawn initials capture and may be used as a Signed Date source.
Signed Date	Automatic and read-only. Link it to exactly one Signature or Initials field. The date appears when that source is completed and is frozen on submission.
Signer Name	Automatic and read-only. Uses the frozen Contact name for the assigned signer.
Signer Email	Automatic and read-only. Uses the frozen primary email address; all frozen addresses remain available for delivery.

Field	Who controls it and how it works
Signer Phone	Automatic and read-only. Uses the frozen Contact phone when available.
Text	Creator-controlled. Enter the value in field properties. The signer sees the frozen text read-only.
Multiline Text	Creator-controlled. Preserves line breaks and wraps inside the field. The signer sees it read-only.
Checkbox	Signer-controlled. When Required is enabled, the signer cannot submit until it is checked.

Signed Date behavior

- The source list contains only valid Signature or Initials fields from the same current document.
- Completing the source displays the date immediately.
- Clearing or replacing the source before submission clears or refreshes the date.
- The signer cannot type, select, or manually change the date.
- The server derives the authoritative value from the source completion timestamp and the request time zone.
- Duplicate remaps the Signed Date link to the copied source field rather than the original Template field.

13. Create and send a signature request

Requests are started from a published Template. The preparation screen is transient: there is no user-facing request-draft library. Leaving before Send discards the unsent preparation after the appropriate warning.

Create the request

51. Open Templates and click Use beside a published Template, or choose a recent Template from the Dashboard.
52. On Request Details, enter or confirm the Title, Expires date and time, Email subject, and Message.
53. The Expires value is calculated from the user's default expiration and account time zone, but it can be changed before sending.
54. Click Prepare & Send.
55. Review the document and complete every required Contact assignment, creator Text value, and Signed Date link.
56. Correct every blocking field warning. Send remains blocked until the request is valid.
57. Click Send and wait for the immediate delivery result.

What Send does

- Checks the effective plan, Contact/Template policy, and monthly group allowance.
- Freezes the exact document, Template version, fields, participants, every ordered email address, request timing, email content, and integrity information.
- Creates secure invitation links and immediately attempts email delivery to every frozen signer address.
- Counts the request against the calendar-month allowance only after a successful freeze and send operation.
- Places the request under Unsigned when one or more signers remain incomplete.

Partial email failure does not invalidate successful invitations

When at least one address succeeds and another fails, the request shows Sent with errors. The successfully delivered link remains active and the signer may continue. The failed address can be corrected or retried from Request View.

14. Track Unsigned requests and Request Status

The Requests tab contains only Unsigned and Completed. Unsigned shows active requests that still need one or more required signers.

Unsigned columns

- Request Date and Title.
- Signer(s), including primary email, +N more for additional addresses, company, and title.
- Signer Status, such as not viewed, viewed with a timestamp, or signed with a timestamp.
- Request Status, which summarizes invitation delivery health.
- Actions: View, Send Reminder, and Cancel when applicable.

Request Status meanings

Status	Meaning
Sending	Immediate invitation delivery is still being processed.
Sent	Every intended invitation address was successfully handed to Joomla mail.
Sent with errors	At least one address succeeded and at least one failed. Successful invitation links remain usable.
Not sent	The request was frozen, but an internal or configuration problem prevented a complete delivery attempt.
Undeliverable	Every intended invitation address was attempted and failed.

Request View

Click View or the Request Status indicator to open the request. The page is organized for users, not developers:

Tab	What it shows
Overview	Plain-language request condition, delivery summary, signer progress, expiration, and issues requiring attention.
Participants	One section per signer, frozen Contact information, viewed/signed status, and per-address delivery results.
Routing	Everyone-at-once or in-order progress, who has completed, who is active, and who is waiting.
Timeline	Readable request, delivery, reminder, correction, view, sign, submit, cancel, and completion events.
Delivery	Per-address status, attempts, last attempt, link state, issue summary, and corrective actions.
Files	Original frozen document, completed PDF when available, Audit Trail, downloads, and collapsed technical integrity details.

15. Correct delivery problems and failed email addresses

Every frozen email address has its own delivery record. A typo or rejected mailbox should be corrected at the address level rather than by recreating the signer or request.

Correct and send a replacement invitation

58. Open the request and select the Delivery tab.
59. Locate the failed or undeliverable email address.
60. Click Correct & Send.
61. Enter the corrected email address and confirm the action.
62. QC Digital Signature validates the replacement, updates the exact matching saved Contact email row, and preserves all unrelated Contact addresses.
63. If the failed address was primary, the corrected address keeps the correct primary position. Existing duplicate addresses are not added again.
64. A new request-level delivery and secure invitation link are created and sent immediately.
65. The original failed address, mail-server response, correction, and replacement invitation remain in the request history.

Other delivery actions

- **Retry:** attempts the same frozen address again when the mailbox or server problem may be temporary.
- **Stop Trying:** suppresses further attempts to that address without changing successful invitation links.
- **Check & send missing invitations:** retries invitation delivery records that are missing or ready for another immediate attempt.

No regular-expression replacement

Contact correction targets the exact normalized email row associated with the failed delivery. It does not search and replace a combined text string, so other saved addresses remain safe.

16. Complete a request as a signer

Signers normally do not need a Joomla account. The secure invitation link exchanges into a signer-specific session and opens only the fields assigned to that participant.

Signer workflow

66. Open the secure link from the invitation email.
67. Review the document and any sender message or instructions.
68. Complete each required field assigned to you.
69. Click a Signature or Initials field to type or draw the value. The whole field is interactive.
70. Review automatic Signer Name, Email, Phone, and Signed Date fields. These values are read-only.
71. Check every required Checkbox.
72. Wait for autosave to finish when the interface indicates that saving is still active.
73. Click Submit when every required field is complete.

Signer protections

- A signer can edit only the fields assigned to that signer.
- Completed prior-signer values may be visible read-only when routing requires them.
- Future-signer values remain hidden or blank as appropriate.
- Two signers using the same browser remain isolated in separate signer sessions.
- A reusable invitation link stops working after completion, expiration, cancellation, revocation, replacement, or participant replacement.
- Signed Date is inserted automatically from the linked Signature or Initials completion time; the signer cannot choose another date.

17. Send reminders and cancel a request

Automatic reminders

The QC Digital Signature Automatic Reminders Scheduled Task checks hourly and sends only reminders that are due according to each user's saved reminder interval. It does not delay initial invitations or completion notices; those are attempted immediately by the action that causes them.

- Only active, incomplete, non-expired signers are eligible for automatic reminders.
- Each frozen signer email address receives its own reminder delivery record.
- Reminder emails do not consume a new monthly request allowance.
- A task run with no reminders due should finish successfully without sending email.

Send a manual reminder

74. Open Requests > Unsigned.

75. Click Send Reminder beside the request, or use the applicable request action from View.

76. Confirm the action. The Reminder Email Template is sent immediately to every active incomplete participant address.

Cancel an unsigned request

77. Open Requests > Unsigned and click Cancel.

78. Review the confirmation and enter a reason when requested.

79. Confirm cancellation.

- Active signer links and sessions are revoked.
- The Cancellation Email Template is sent to the frozen participant addresses.
- The request snapshot, delivery records, cancellation reason, and audit history are preserved.
- Cancelling a request does not refund a monthly request that was successfully sent.

18. Review Completed requests, PDFs, and Audit Trails

When all required signers complete, QC Digital Signature finalizes the request once, creates the completed document, appends the Audit Trail, stores one immutable PDF, and immediately attempts completion delivery.

Completed manager actions

Action	Behavior
View	Opens the user-facing request details, participants, timeline, delivery, and files.
Download	Streams the exact protected completed PDF stored at finalization.
Resend	Uses the Completed-document Resend Email Template and attaches the exact stored completed PDF rather than regenerating it.

Audit Trail and file integrity

- The Audit Trail may include the request title, sender, participants, frozen delivery addresses, delivery events, viewed/signed/submitted/completed times, signature method, Signed Date evidence, IP address, user agent, time zone, and document hashes when actually captured.
- QC Digital Signature does not invent a computer name, precise location, or identity assurance that was not collected.
- The protected Download, completion attachment, and resend attachment use the same immutable stored PDF.

- A failed completion email does not undo signatures, invalidate the final PDF, or move the request out of Completed.
- Failed completion recipients can be corrected or resent without regenerating the completed document.

19. Configure Max user-group request limits

Max and All Access administrators can control how many signature requests members of each Joomla user group may send during each calendar month. This can support membership levels, customer plans, departments, internal budgets, or sites that sell access to electronic-signature services.

Enable and configure limits

80. Open the administrator User Group Limits tab.
81. Enable monthly request limits.
82. Enter a numeric allowance for each group, or select Unlimited.
83. Click Save User Group Limits.
84. Test with a normal user account from each important group before offering paid or controlled access.

Allowance rules

- When the feature is enabled, every group starts at 0 unless another value is saved.
- A user in multiple groups receives the highest configured allowance.
- Unlimited overrides every numeric value.
- Joomla Super Users remain unlimited.
- Only successfully sent requests count.
- Failed sends and abandoned transient preparation screens do not count.
- Cancellation does not refund a successfully sent request.
- Reminders, downloads, completion, and completed-document resends do not count as new requests.
- The count resets at the start of each calendar month in the user account time zone, falling back to the Joomla site time zone.

The entire User Group Limits section remains visible on Basic and Pro as a disabled Max preview. Saved values remain preserved after downgrade.

20. Email delivery and Joomla mail settings

QC Digital Signature uses Joomla's configured mail transport. The administrator controls the global sender identity, while registered users control their request subjects and messages through frontend Email Templates.

Immediate and scheduled email behavior

Email	When it is attempted
Invitation	Immediately when the sender clicks Send.
Sequential signer invitation	Immediately when the participant becomes active.
Manual reminder	Immediately when the sender clicks Send Reminder.
Automatic reminder	When the hourly reminder task finds a reminder that is due.
Cancellation	Immediately after the sender confirms cancellation.
Completion	Immediately after the final PDF and Audit Trail are created.
Completed-document resend	Immediately when the sender clicks Resend.

Email	When it is attempted
Send Test	Immediately to the currently logged-in Joomla user's email address.

Before relying on email

- Send a Joomla test email and a QC Digital Signature Email Template test.
- Confirm the global sender domain is authorized by the configured SMTP or mail provider.
- Check SPF, DKIM, DMARC, mailbox existence, blocklists, provider quotas, and spam filtering when a recipient rejects mail.
- Use Request View > Delivery to see the result for each address rather than assuming the entire signer failed.
- Do not place license keys, passwords, private storage paths, or sensitive personal information in email templates.

21. Support tab and downloadable resources

The Support tab provides direct access to QuantaCade help, account management, product information, and the current User Walkthrough PDF.

Button or resource	Destination or purpose
Open Support Center	https://www.quantacade.com/user/my-profile?qc_profile_tab=support
Open My Profile	https://www.quantacade.com/user/my-profile
View Product Page	https://www.quantacade.com/extensions?qc_product=qc-digital-signature
User Walkthrough PDF	Setup, daily use, signer flow, delivery troubleshooting, completion, and going-live guidance.
QuantaCade Website	Products, accounts, licenses, downloads, documentation, and support resources.

Support Information

The Support Information card includes product, version, product code, domain, masked saved key, license status, Effective Tier, and Installation UUID. Include these values in a support request when possible. Do not send the full license key, signer tokens, private file paths, SMTP passwords, database credentials, or other secrets.

22. Going live checklist

- QC Digital Signature 1.01.06 is installed and the package, component, and companion plugins are enabled.
- The license validates, Effective Tier is correct, and Status shows a valid next automatic check.
- The Automatic Reminders task is enabled and runs hourly without exit-code errors.
- The License Revalidation task is enabled and runs every 24 hours.
- The administrator sender name and sender email are correct, or Joomla's fallback values are intentional.
- A normal registered user can open the frontend application and sees Dashboard, Requests, Templates, Contacts, and Settings.
- The frontend menu item uses Registered access when all logged-in users should have access.
- A Contact with one email address receives an invitation and can complete a request.
- A Contact with multiple email addresses receives separate deliveries while remaining one signer.
- A deliberately invalid secondary address produces Sent with errors without blocking the successful invitation link.

- Correct & Send updates the exact saved Contact address and delivers a replacement link.
- A PDF Template can be added, edited, published, used, duplicated, and deleted without damaging history.
- Every unlocked field can be moved and resized; Lock placement blocks both.
- Signed Date, automatic signer fields, creator Text/Multiline Text, and required Checkbox behavior are verified.
- A two-signer same-browser test keeps signer sessions isolated.
- A manual reminder and an automatic reminder are delivered using the saved Reminder template.
- Cancellation revokes signer access and sends the Cancellation email.
- Completion creates the final PDF and appended Audit Trail.
- Completion attachment, protected Download, and Resend attachment are the same immutable file.
- On Max/All Access, important Joomla groups have tested monthly allowances before access is sold or bundled.
- Support links, protected package downloads, licensed Joomla updates, and the User Walkthrough PDF open correctly.

23. Troubleshooting

Issue	What to check
License is pending or the tier is wrong	Save and validate the key again, confirm the QuantaCade plan and domain, review Last checked and Next automatic check, then confirm the License Revalidation task.
Registered user cannot open QC Digital Signature	Confirm the user is logged in, the menu item is published, Access is Registered or otherwise appropriate, and Joomla/component permissions allow access.
Add Template upload fails	Try a small PDF, confirm file type and size, private storage permissions, quarantine checks, document-conversion support for DOC/DOCX, and server logs.
Template Use button is gray	Open Edit and publish the Template. Use is available only when a usable published version exists and the user is not blocked by the monthly request allowance.
Field will not move or resize	Select the field, confirm Lock placement is off, use the lower-right resize handle, clear browser cache, and verify the current extension assets loaded.
Publish or Send is blocked	Follow the red field-level warning. Check page bounds, Contact assignment, Signed Date link, creator Text value, retired field type, and required field configuration.
Invitation email never arrives	Open Request View > Delivery. Confirm the request was sent immediately, review each address result, Joomla mail settings, SMTP provider response, spam filtering, and mailbox spelling.
Request shows Sent with errors	At least one address succeeded and another failed. The successful link remains usable. Correct, retry, or stop trying the failed address from Delivery.
Secure invitation says request is unavailable	Confirm the request is not completed, expired, cancelled, revoked, replaced, or undeliverable. For partial delivery, verify that the successful address has an active invitation delivery.
Automatic reminder task fails	Open System > Scheduled Tasks, review the task result and Joomla logs, confirm the task plugin is enabled, and verify the request database is current.
Automatic reminder is not sent	Confirm the request is active and incomplete, not expired, the user reminder interval is due, the hourly task runs, and the address is not suppressed.

Issue	What to check
Signer cannot submit	Complete every required assigned field, wait for autosave, check required Checkbox fields, and confirm the signer is using the correct participant link.
Signed Date is blank	Link the Signed Date to a Signature or Initials field in the request. The date appears only after that source is completed.
Completed email fails	The request should remain Completed. Review Delivery, correct or retry the failed recipient, and use Resend. Do not regenerate or recreate the request.
Download or PDF is unavailable	Confirm the request completed, the protected file exists, ownership and permissions are correct, and direct public access is not being used.
Monthly request is blocked	Review Requests sent this month, the user's Joomla groups, enabled Max group limits, highest allowance, account time zone, and whether the calendar month reset.
Email Template test fails	Confirm the logged-in Joomla user has an email address, Joomla mail can send, the global sender identity is accepted by the provider, and the template contains valid placeholders.
Update is not detected	Confirm the saved license key, update site registration and enabled state, QuantaCade version metadata, protected package entitlement, and Joomla update cache.

24. Glossary

Term	Meaning
Private signing area	The automatically provisioned, user-specific QCDS boundary containing one registered user's Contacts, Templates, requests, settings, and files.
Contact	One saved signer identity. A Contact may have multiple email addresses but remains one participant.
Template	A reusable document and field layout. Published Templates can be used to create requests and remain editable through version succession.
Published Template	A Template version approved for Use. An unpublished Template can be edited but cannot start a request.
Request	A frozen electronic-signature transaction created from a Template and sent to one or more participants.
Unsigned	A request that is active and still waiting for at least one required signer.
Completed	A request whose required participants submitted and whose final PDF was created.
Participant	One signer identity frozen into a request, including its ordered email-address list.
Invitation	A secure signer-specific email and link used to open the signing application.
Request Status	The request-level summary of invitation delivery, such as Sent, Sent with errors, Not sent, or Undeliverable.
Signer Status	The participant progress state, such as not viewed, viewed, or signed.
Signed Date	An automatic read-only date linked to a Signature or Initials field and derived from that field's completion timestamp.

Term	Meaning
Delivery record	The saved result of one email attempt to one frozen address.
Replacement invitation	A new secure invitation created after correcting a failed address while preserving the original failure history.
Automatic reminder	A scheduled email sent to an active incomplete signer when the saved reminder interval is due.
Audit Trail	The appended pages summarizing captured request, signer, delivery, timing, and integrity evidence.
Immutable completed PDF	The one protected final document stored at completion and reused for Download, completion email, and Resend.
Effective Tier	The Basic, Pro, Max, or All Access feature tier currently recognized by license validation.
Monthly request allowance	The Max/All Access limit controlling how many successfully sent requests a Joomla user group may use in one calendar month.
Installation UUID	A unique installation identifier used for licensing and support context.