



E-Signatures

2018 - Summer Edition

User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Accessing the Tool](#)

[Creating an E-Signature Document](#)

[Creating an E-Signature from an Event](#)

Overview

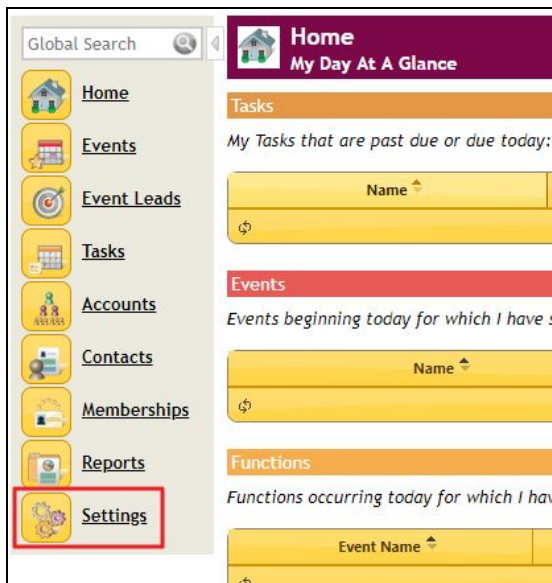
Reserve has the ability to request an e-signature for virtual contracts. This is done using the merge field `$(ext.documentSignature)` in the document(s) you need signatures on.

Use Case(s)

In the event you wish to send contracts to your members/clients virtually to obtain a signature.

Accessing the Tool

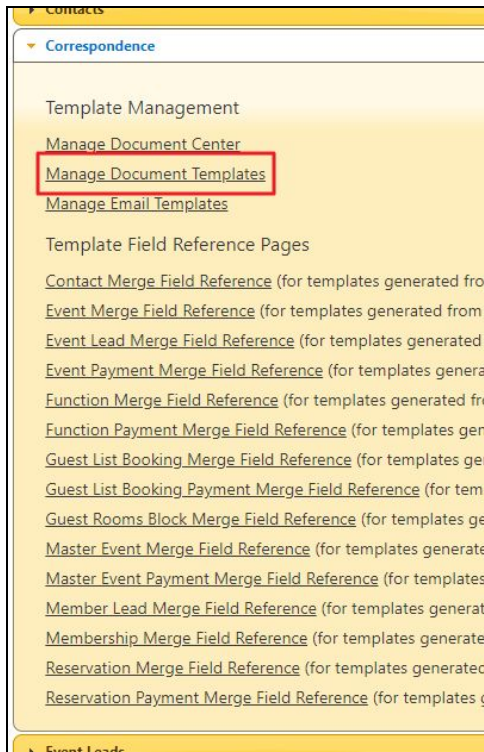
Within Banquets, click on **Settings**.



Click on **Correspondence**.



Then, **click Manage Document Templates.**



Creating an E-Signature Document

Click on the name of the document template you wish to use. This will download the document.

New Done		
Actions	Name ↑	Description
View Edit Delete	Contract/Confirmation Letter with Deposit Due	With Single Deposit: Letter to confirm tentatively booked event.
View Edit Delete	E-Signature Confirmation Letter	
View Edit Delete	E-Signature Event Order	Event Order with Prices and Total Charges
View Edit Delete	Event Invoice	Event Invoice
View Edit Delete	Event Order - Contact	Event Order with Prices and Summary of Charges
View Edit Delete	Event Order - Contact	Event Order with Prices and Total Charges
View Edit Delete	Event Order - Internal	without prices
View Edit Delete	Event Order - Internal	Internal Event Order with Prices and Internal Notes
View Edit Delete	Event Proposal	Event Proposal
View Edit Delete	Thank You Letter	Thank you letter with Survey

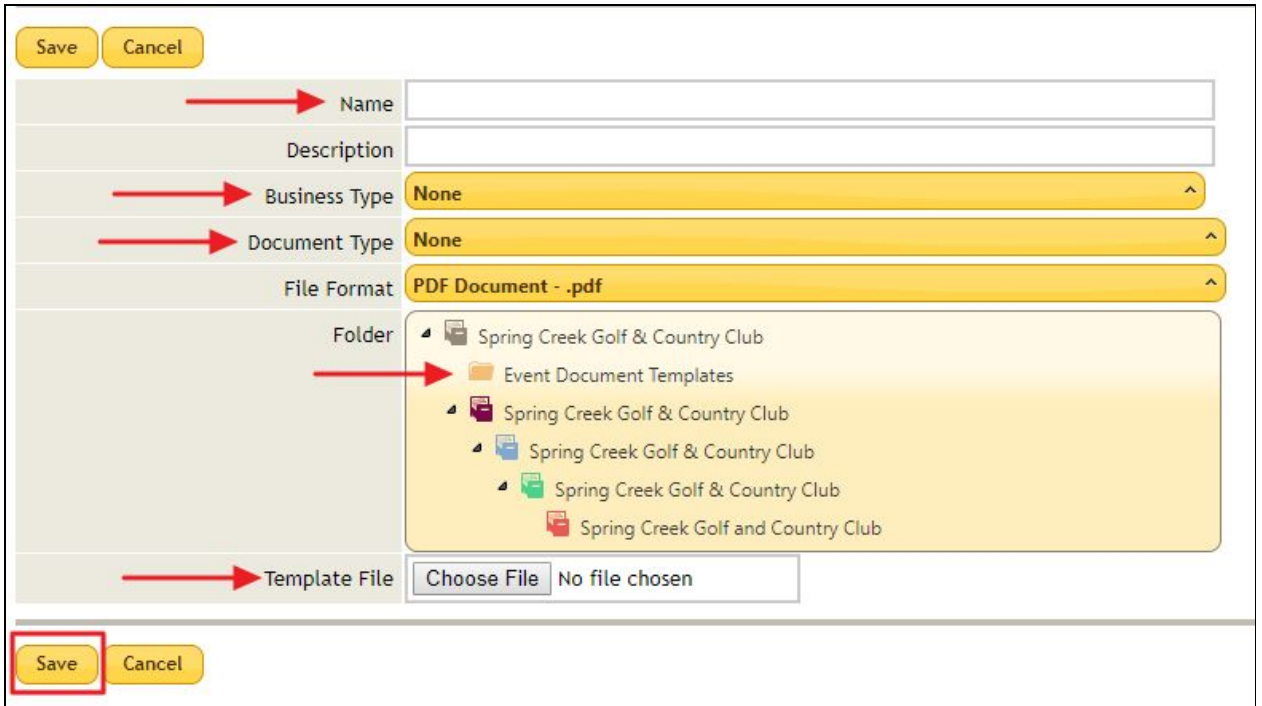
[Done](#)

Copy and paste the merge field to the document on the signature line or at the bottom.
 Save the document on your computer.
 Click New.

New Done		
Actions	Name ↑	Description
View Edit Delete	Contract/Confirmation Letter with Deposit Due	With Single Deposit: Letter to confirm tentatively booked event.

Enter the following information:

- Name
- Description
- Business Type (Event)
- Document Type, Select Folder (Event Document Templates)
- Choose File (upload document)



The screenshot shows a form with the following fields and controls:

- Buttons: Save, Cancel (top left)
- Name: Text input field with a red arrow pointing to it.
- Description: Text input field.
- Business Type: Dropdown menu with "None" selected and a red arrow pointing to it.
- Document Type: Dropdown menu with "None" selected and a red arrow pointing to it.
- File Format: Dropdown menu with "PDF Document - .pdf" selected.
- Folder: Tree view showing a folder structure. A red arrow points to the "Event Document Templates" folder.
- Template File: Text input field with "Choose File" and "No file chosen" buttons. A red arrow points to the "Choose File" button.
- Buttons: Save, Cancel (bottom left, with the "Save" button highlighted by a red box).

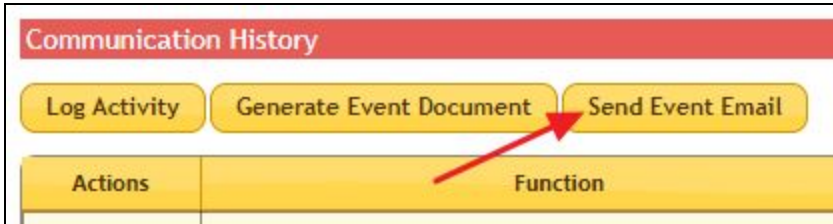
Note: We suggest naming the doc E-Signature _____. For example E-Signature BEO or E-Signature Contract.

Click Save.

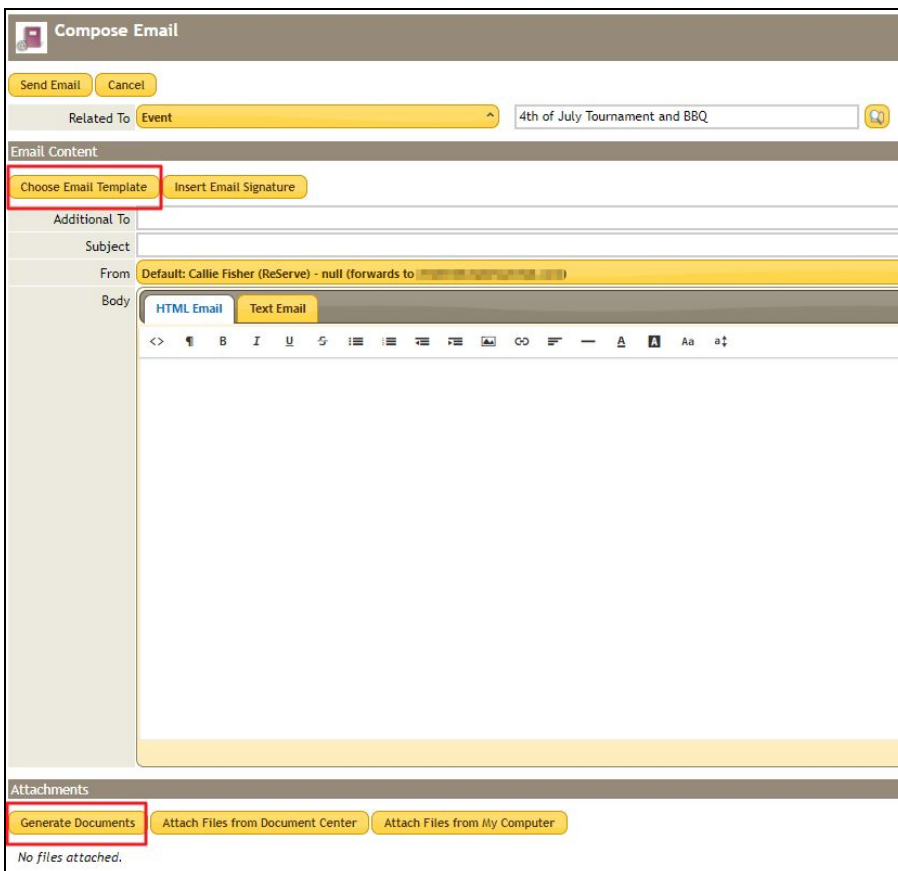
Creating an E-Signature from an Event

Open the Event from Calendar.

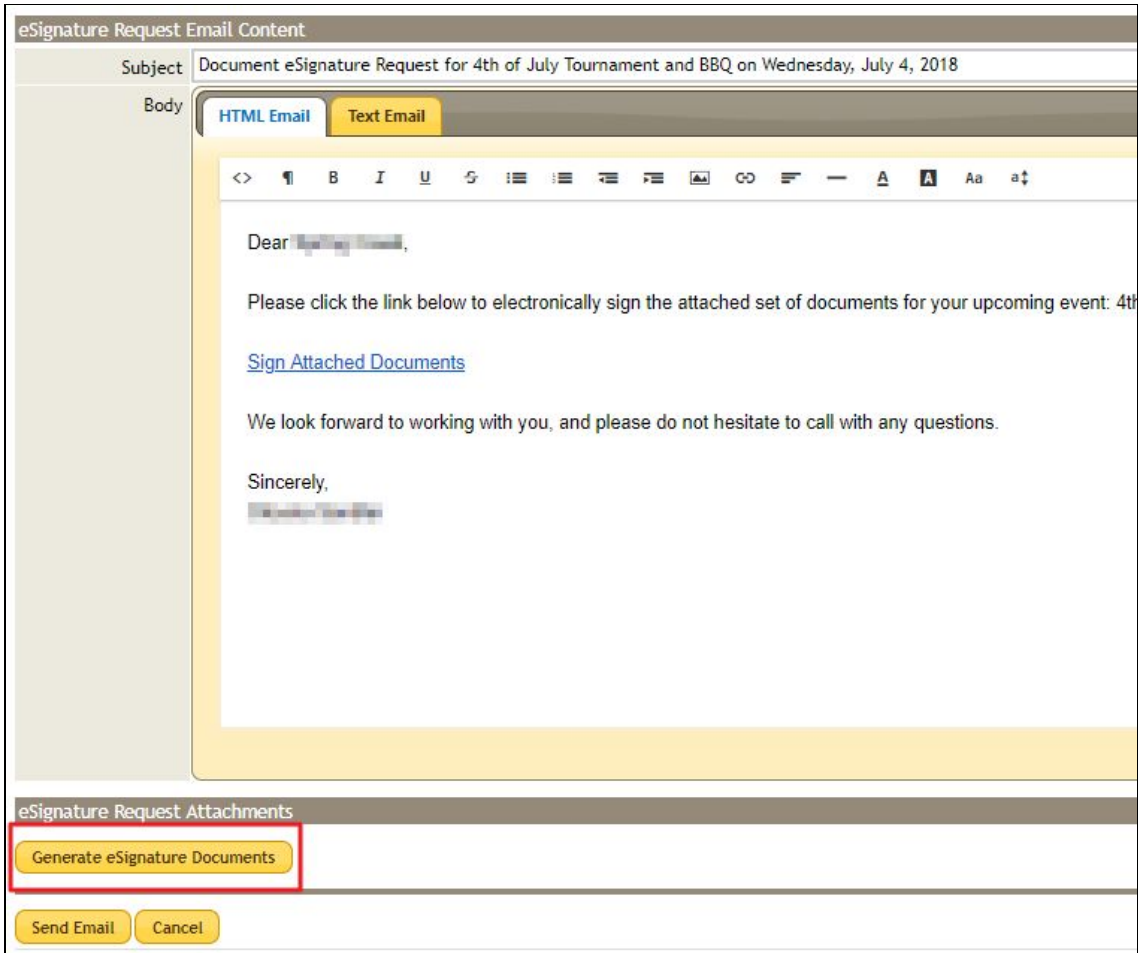
Click Send Event Email.



Click Choose Email Template. Then, click Generate Documents



Click, Generate E-Signature Documents.





eSignature Request Email Content

Subject Document eSignature Request for 4th of July Tournament and BBQ on Wednesday, July 4, 2018

Body

HTML Email Text Email

<> B I U   Aa a↑

Dear [Redacted],

Please click the link below to electronically sign the attached set of documents for your upcoming event: 4th

[Sign Attached Documents](#)

We look forward to working with you, and please do not hesitate to call with any questions.

Sincerely,
[Redacted]

eSignature Request Attachments

Generate eSignature Documents

Send Email Cancel

Check the box Request eSignature.

Folder: ReServe Default Documents All Organization Folders Spring Creek Golf & Country Club Document Type: All Document Types

Choose Filters

Filter by Functions Override Document Defaults

Choose Template

<input type="checkbox"/>	Name	Description	Document Type	Folder	Separate Function Pages	Sort First By	Filtered By	Format
<input type="checkbox"/>	Contract/Confirmation Letter with Deposit Due	With Single Deposit: Letter to confirm tentatively booked event.	Contract	Event Document Templates	No	Function		.pdf
<input checked="" type="checkbox"/>	E-Signature Confirmation Letter		Contract	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	E-Signature Event Order	Event Order with Prices and Total Charges	Event Order	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Invoice	Event Invoice	Invoice	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Order - Contact	Event Order with Prices and Total Charges	Event Order	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Order - Contact	Event Order with Prices and Summary of Charges	Event Order	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Order - Internal	Internal Event Order with Prices and Internal Notes	Event Order	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Order - Internal	without prices	Event Order	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Proposal	Event Proposal	Proposal	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Guest Menu	Displays menus for each function on a separate page.	Miscellaneous	ReServe Default Documents	Yes	Function		.pdf

Page 1 of 2 10 View 1 - 10 of 11

Generate Documents Cancel

Enter your name in the eSignature Requester box.

Compose eSignature Request.

The screenshot shows the 'Request eSignature' section of the interface. At the top, there are three buttons: 'Generate Documents', 'Attach Files from Document Center', and 'Attach Files from My Computer'. Below these is the text 'No files attached.' The 'Request eSignature' section has a checkbox labeled 'Request eSignature' which is checked. Below the checkbox is a text input field labeled 'eSignature Requester' with a search icon on the right. A 'Compose eSignature Request' button is located below the input field. The bottom section is titled 'eSignature Request Email Content' and includes a 'Subject' field and a 'Body' field with 'HTML Email' and 'Text Email' tabs and a rich text editor.

Generate eSignature Documents.

The screenshot shows the 'eSignature Request Email Content' editor. The 'Subject' field contains the text 'Document eSignature Request for 4th of July Tournament and BBQ on Wednesday, July 4, 2018'. The 'Body' field is in 'HTML Email' mode and contains the following text: 'Dear [Name],', 'Please click the link below to electronically sign the attached set of documents for your upcoming event: 4th of July BBQ.', a blue hyperlink 'Sign Attached Documents', 'We look forward to working with you, and please do not hesitate to call with any questions.', and 'Sincerely, [Name]'. At the bottom, there is a section titled 'eSignature Request Attachments' with a 'Generate eSignature Documents' button highlighted by a red box. Below this are 'Send Email' and 'Cancel' buttons.

Select the e-signature document.

Folder

- ReServe Default Documents
- All Organization Folders**
- Spring Creek Golf & Country Club

Document Type

All Document Types ^

Choose Filters

Filter by Functions

Override

Document Defaults

Choose Template

<input type="checkbox"/>	Name	Description	Document Type	Folder	Separate Function Pages	Sort First By	Filtered By	Format
<input type="checkbox"/>	Contract/Confirmat Letter with Deposit Due	With Single Deposit: Letter to confirm tentatively booked event.	Contract	Event Document Templates	No	Function		.pdf
<input checked="" type="checkbox"/>	E-Signature Confirmation Letter		Contract	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	E-Signature Event Order	Event Order with Prices and Total Charges	Event Order	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Invoice	Event Invoice	Invoice	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Order - Contact	Event Order with Prices and Total Charges	Event Order	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Order - Contact	Event Order with Prices and Summary of Charges	Event Order	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Order - Internal	Internal Event Order with Prices and Internal Notes	Event Order	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Order - Internal	without prices	Event Order	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Event Proposal	Event Proposal	Proposal	Event Document Templates	No	Function		.pdf
<input type="checkbox"/>	Guest Menu	Displays menus for each function on a separate page.	Miscellaneous	ReServe Default Documents	Yes	Function		.pdf

Page 1 of 2

View 1 - 10 of 11

Generate Documents

Cancel

Send Email.