RentalPoint Electronic Signatures

Last Modified on 05/05/2022 12:23 pm EDT

RPSign can be used to request and receive digital signatures for documents when requesting quotes from clients. This is a built-in feature of RentalPoint3, so no third party application is needed.

Alternatively, RentalPoint can also be configured to integrate with DocuSign (a subscription to DocuSign is required)

Using RPSign in RentalPoint3

Producing your Document

Once RentalPoint3 is configured to use RPSign, use any template that already has the RPSign field included OR add the necessary fields to your custom templates before proceeding

For standard templates (i.e. included with RentalPoint3), display your Fast Report with 'Print RPSign Rental Terms' Checked



Save your quote

			QUOTE				Page 1 of
	E 觉	ма	Printed on, 28/Feb/2022 10:54 Al	м	Job: Status:	WOWAUE Confirmed	00001 d
	AV		By Mandy Fox		Ref:	WOW Wir 2022	nter Fete Feb
					Showname	WOW Wir 2022	nter Fete Feb
					Terms:	* Cash on	delivery
	PREPARED FOR		DATES			JOB SITE	
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Paris Or Canada	ntario L5L 3K5	Show Start: Show End: Pickup:	Wed, 02-Feb-22 11:3 Wed, 02-Feb-22 6:0 Wed, 02-Feb-22 6:0	00 PM	Address:	998 Clanb Elora Onta	orassil Street ario K5G3F4
Contact Phone:	: Samuel Golden				Contact: Phone:		
cilidii.	should manageman.com						
QTY	DESCRIPTION		DAYS	UN	IIT RATE	DISC %	EXTENDED
20	RF 15 Floor Standing Spea	aker Hal Camara	3		80.00		4,800.00
1	Sigma fp L Mirrorless Digi	tal Camera	3		0.00		500.00
Heading Mai	<mark>g Totals</mark> n Body						7,800.00
						Rental	\$ 7,800.00
					Tot	al Due:	\$ 7,800.00
By sign	ing below, the undersigned accept this quotation and	l acknowledge any terms outl	s their authority to lined within	L			



Then use the

Send 🚀

option to request an electronic signature



Email addresses associated with the booking will display. Choose an email address to send your document to, then click

	Send e	emails			×
		Emily Blunt Thomas O'Reilly Emily Blunt	emilyb@abbeyhotel.com accounts@abbeyhotel.com emilyb@abbeyhotel.com	Booking Payment Customer	
<	1				

next, choose a signature and enter or select your email body paragraph

- 1. If you haven't already set up email signatures or body paragraphs, see how under <u>General information at</u> <u>this link</u>
- 2. Enlarge the body paragraph by dragging the window from point 2 below

Rentalpoint email sen	d					×	
Email address	mandy@rentp.co	om			CC To Self		
То	emilyb@abbeyh	otel.com			Search		
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Emily, See attached quotation as We look forward to workin Best regards, Sally Hansen	s requested. Plea	se e-sign and re	turn to secu	ure your b	ooking.	li	2
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Attached files	*	Size	$\frac{1}{2}$	\$	Add		
4	No attached fi	les.		Þ			
Prompt for email password	before sending en	nail			Close	end	

then click

Send

You may be required to enter your email password before sending OR force the prompt using

Prompt for email password before sending email checkbox on the lower left of the window.

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Email address To Subject Signature	mandy@rentp.com □ c rentp.mandy@gmail.com Sec Please enter email password ×	C To Self arch
WOWAUD-00001Q Attached files	Save password: Close Apply	
Prompt for email pa	No attached files.	Close Send



What your customer will see

Ensure your customer has added your email address to their contacts list in order to prevent your electronic signature request going to their Spam folder.

The client will see an email from your email address with an attached PDF.

A clickable link in the signature box, will prompt for an electronic signature

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Contact Phone:	: Samuel Golden			Contact: Phone:		
Email:	sholden@gmail.com					
QTY	DESCRIPTION		DAYS	UNIT RATE	DISC %	EXTENDED
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5	Sigma fp L Mirrorless Dig	tal Camera	3	0.00		2,500.00
1	Sigma fp L Mirrorless Dig	ital Camera	3	0.00		500.00
IVIdi	n bouy				Rental	\$ 7,800.00
				т	otal Due:	\$ 7,800.00
By sign	ning below, the undersigne accept this quotation and on behalf of WO	d acknowledges any terms outli N Audio & Even	their authority to ned within ts			
	en senarj oj Wer					
Click to	add Signature					
				_		

Insert signature text, format as needed, accept terms and proposal

	Please sign docum	ent	=	AEYAYQBzAHQAUgBl	1 / 1	- 59% +	:	\$		Ŧ	•
Date: Show: Booking: Document: Your name:	28 Feb, 2022 WOW Winter Fete Feb 2022 WOWAUD00001 WOWAUD-00001Q-V007.pdf RentalPoint Support	₹ Use as Signature				Eav		QUOTE Printed on, 28/766/2022 10:56 AM By Mandy Fes	Job: Status: PO #: Ref: Shownarr Terms:	WOWAUD Confirmed 564 WOW Win 2022 * WOW Wir 2022 * Cab on	Pa X0001 ter Fete I ter Fete I
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K	RentalPoint S	upport				QTV DESCRIPTION 20 RF 15 Floor Standing Speal 5 Sigma fip L Minores Digit 1 Sigma fip L Minores Digit Heading Totals Main Body	ker al Camera al Camera	DAYS 3 3 3	UNITRATE 80.00 0.00 0.00	Rental Iotal Due:	EXC 4 2 3 \$1 \$3
•	Clear	• • • • •				By signing below, the undersigned accept this quotation and a on behalf of WOW	ocknowledges my terms outli ' Audio & Event	their authority to ned within s			
Review, Sign & Acc Please read your terms	cept of service as it contains important information regarding the your name, accept the terms and click accept proposal.	scope and conditions of this proposal. To									
electronically sign, type											

Once accepted, the signee will see a 'Document signed' confirmation in the top right corner of the page and the operator who sent the quote will receive a notification email.



Signed Documentation Attached to the Booking

Once the document has been signed, the sending operator will receive and email notification



Highlight the booking, then click on View Attachments



OR from right click menu

WOWAUD00001 WOW Audio & Events		WOW Winter Fete F	eb 2022	Confirmed	Renta
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	🕝 Open	+			
	View	•	🥔 Attachme	ents	
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Click on any document link to see signage details

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8/2022 12:35:31 PM Ren	talPoint Support	WOWAUD-00001Q-V007.pdf			Terms:	2022 * Cash on de	liver
Rental	Point	Suppor	Canada SI Pi Contact: Samuel Golden Phone: Email: sholden@gmail.com	how End: Wed, 02-Feb-22 6: ickup: Wed, 02-Feb-22 6:	00 PM 00 PM Contact: Phone:	Elora Ontari	э K5G
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Review All E-Signature Documents

See all e-signature documents under the Action Lists menu option

Fig 1.1

RentalPoint	= RentalPoint3	DB [12.0.2.2] Rev [3150]									nandy@rentp.com =
🙆 Dashboard	1.2								Rep	orts • Assets • Setup •	Others - Help -
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🚨 Card file	Copen H Print	4									.
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	WOWAUD00001	WOW Audio & Events	WOW Winter Fete Feb 2022	2/2/2022 12:00:00 AM	2/4/2022 12:00:00 AM		4,810.00	Confirmed	Not sent	2/24/2022 4:26:39 PM	RP Sign
it⊒ Action Lists ✓	WOWAUD00001	WOW Audio & Events	WOW Winter Fete Feb 2022	2/2/2022 12:00:00 AM	2/4/2022 12:00:00 AM		4,810.00	Confirmed	sent	2/24/2022 8:50:45 PM	DocuSign
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🤳 Contacts											

1. Use the **T** option to filter between **RPSign** and **DocuSign** documents. You can also exclude documents saved but not emailed out for signature 'not sent' and/or documents sent out for e-signature that were not signed 'declined' documents.

Display Preferences		Region/Location	
 Overdue Unconfirmed Overdue for Checkout Overdue for Return Overdue for Invoicing Bookings To Be Re-Invoiced Target Margins Electronic Signatures 		 All Select Location O - Main 	~
Type Scope All Docu Sign service RP Sign service	Exclude Scope Exclude Not se	ent ed	

2. Access other menu options via DocuSign account.

including opening the DocuSign envelope to review directly in your



- 3. Use the Search option on the far right of the window to search for a particular booking (fig 1.1 above)
- 4. Open/Print booking details
- 5. Identifies the type of e-signature requested i.e. DocuSign or RPSign

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Configure RentalPoint3 RPSign Integration

(I) RPSign works by assigning a URL to the document and pasting it into the PDF document sent to clients. By clicking on the URL, the customer can review and sign the document.

The following APP Settings are required in c:/inetpub/wwwroot/RP3RentalPoint3/web.config file - contact support@rentp.com for assistance with this step as needed.

Define RPSign URL

```
</appSettings>
<add key="RPSignURL" value="https://<Your Server DNS>/RP3/Sign/Index/" />
</appSettings>
```

Define Email Subject

By default, the email subject for all documents sent out for signature will be 'Signature Request'. If you would like to change the subject, use the terminology below in web.config

</appSettings> <add key="defaultEmailSubject" value="Electronic Signature Request" /> </appSettings>

Email Settings

- Gmail (using a public or private domain account hosted by Google)
 - You'll need to set up both a Project and Gmail API (for desktop app) in your Google Account.
 - Then create OAuth credentials

← Create OAuth client	ID
A client ID is used to identify a sing multiple platforms, each will need i information. <u>Learn more</u> about OA	gle app to Google's OAuth servers. If your app runs on its own client ID. See <u>Setting up OAuth 2.0</u> for more uth client types.
Desktop app	•
Name * RP3 Mail	
The name of your OAuth 2.0 client. console and will not be shown to en	This name is only used to identify the client in the id users.
Note: It may take 5 minutes to a fe	w hours for settings to take effect
CREATE CANCEL	

and download the json file

OAuth client created

0

DOWNLOAD JSON

The client ID and secret can always be accessed from Credentials in APIs & Services

> OAuth is limited to 100 <u>sensitive scope logins</u> until the <u>OAuth</u> <u>consent screen</u> is verified. This may require a verification process that can take several days.

Your Client ID	6
Your Client Secret	Б

- Rename the file to 'credentials' and contact support@rentp.com to complete your gmail setup.
- The email used in Location (via setup-->Locations) or Company (via Setup-->Parameters) SMTP settings
 must match the account used to set up the Gmail API and the account used to configure email in
 RentalPoint3

0	RP	RentalPoint Version 11 Parameter Setup					
4 4	Company Name	Accounts	invoicing	Custom Printing	کی Booking Hardcopy		
4	Pricing Setup	Operational Satur	_	w	Terminology		
4	Friding Setup		Web and Em	nail Setup	×		
5		General SMTP WebServices SMTP					
4	Web and Email	Email Address	rentp.mandy@gmai	il.com			
4 5		SMTP Address(Host)	smtp.gmail.com				
2	Parameter Notes	SMTP Port	587				
8		SSL/TLS	TLS 🔻				
7		My smtp server requires authentication					
1							
0	Clear Stored Password						

- Office365
 - You'll need to *configure a connector to send mail using Microsoft 365 or Office 365 SMTP relay*
 - Once configured, goto Setup-->Operators in RentalPoint2 and configure as follows using the connector address in SMTP Address below
 - No password is needed when using a connector, so when prompted for a password just leave it blank

Email settings	Use Custor	Use Custom Email Settings 🗸 🗸				
Email Address	info@ l.com					
SMTP Address(Host)						
SMTP Port	25	SSL/TLS	Not used 💌			

My smtp server requires authentication

• Configure email settings in web.config file

<svstem.net></svstem.net>	
<mailsettings></mailsettings>	
<smtp deliverymethod="network" from="info@l.com"></smtp>	
<pre><network enablessl="false" host="icom.mail.protection.outlook.com" password="" port="25" username="</pre></td><td>.com"></network></pre>	
<appsettings></appsettings>	
<add key="useGmailApi" value="false"></add>	
<add key="webpages:Version" value="3.0.0.0"></add>	
<add key="webpages:Version" value="3.0.0.0"></add>	

• If 'Document Signed' notification emails go to your Spam or Junk folder, you'll need to register the static IP of your RentalPoint3 server in your Microsoft 365 admin center. Contact

support@rentp.com for your Static IP

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RentalPoint3 Fast Report Templates

In RentalPoint3, customedesigner.exe is used to edit your '.fr3' report templates. The electronic signature field should be available on standard quotes using the 'Print RPSign Rental Terms' option OR contact support@rentp.com to add the fields to your custom templates.

The text or picture field added must have the name RpSign

	Properties		Р х		
U	RpSign TextObject				
L	?≣ ≵↓ 💷 🧭				
	(Name)	RpSign	^		
	AllowExpressions	True			
	Anchor	Top, Left			
	Angle	0			
	AutoShrink	None	=		
	AutoShrinkMinSize	0			