

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.

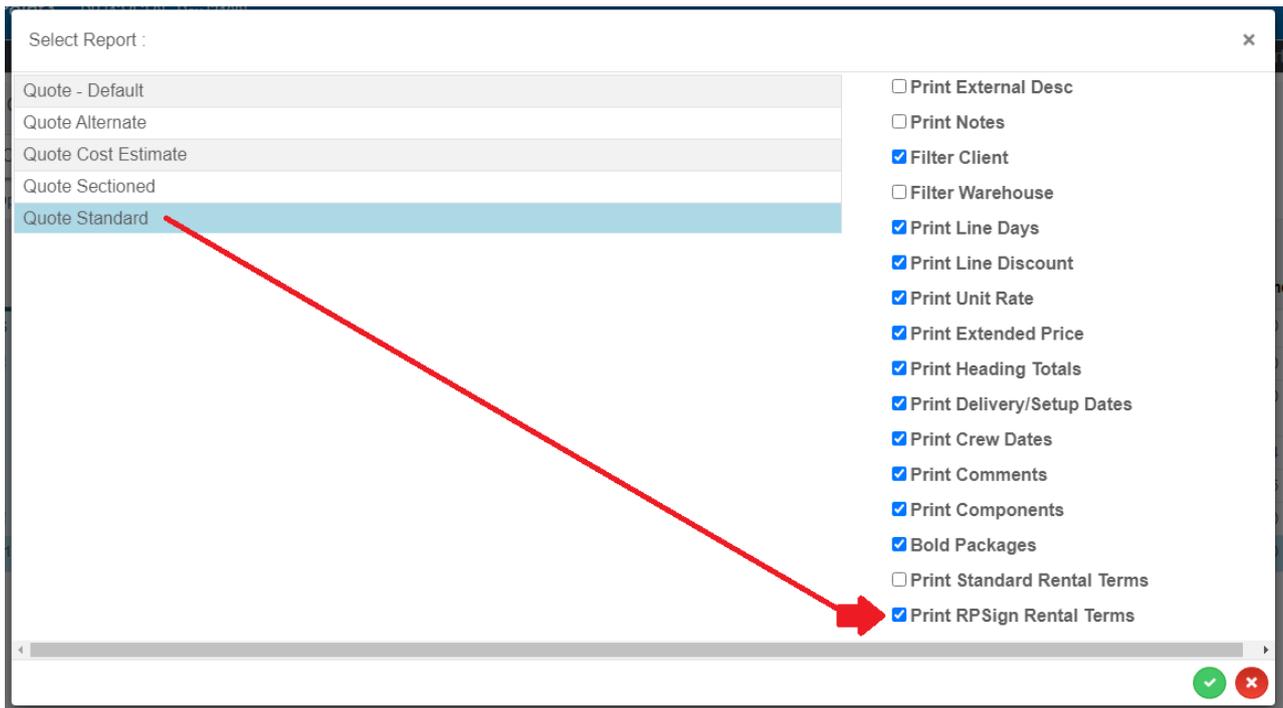
 Alternatively, RentalPoint can also be configured to integrate with **DocuSign** (a subscription to DocuSign is required)

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

Printed
Mon, 28/Feb/2022 10:54 AM

By
Mandy Fox

Job: WOWAUD00001
Status: Confirmed
PO #: 564
Ref: WOW Winter Fete Feb 2022
Showname: WOW Winter Fete Feb 2022
Terms: * Cash on delivery

PREPARED FOR	DATES	JOB SITE
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WOW Audio & Events
88776 Westmorland Street
Paris Ontario L5L 3K5
Canada

Deliver: Wed, 02-Feb-22 11:37 AM
Set-Up By: Wed, 02-Feb-22 11:37 AM
Show Start: Wed, 02-Feb-22 11:37 AM
Show End: Wed, 02-Feb-22 6:00 PM
Pickup: Wed, 02-Feb-22 6:00 PM

Venue: Heritage Park
Room:
Address: 998 Clanbrassil Street
Elora Ontario K5G3F4

Contact: Samuel Golden
Phone:
Email: sholden@gmail.com

Contact:
Phone:

QTY	DESCRIPTION	DAYS	UNIT RATE	DISC %	EXTENDED
20	RF 15 Floor Standing Speaker	3	80.00		4,800.00
5	Sigma fp L Mirrorless Digital Camera	3	0.00		2,500.00
1	Sigma fp L Mirrorless Digital Camera	3	0.00		500.00

Heading Totals
Main Body

Rental \$ 7,800.00
Total Due: \$ 7,800.00

By signing below, the undersigned acknowledges their authority to accept this quotation and any terms outlined within on behalf of WOW Audio & Events

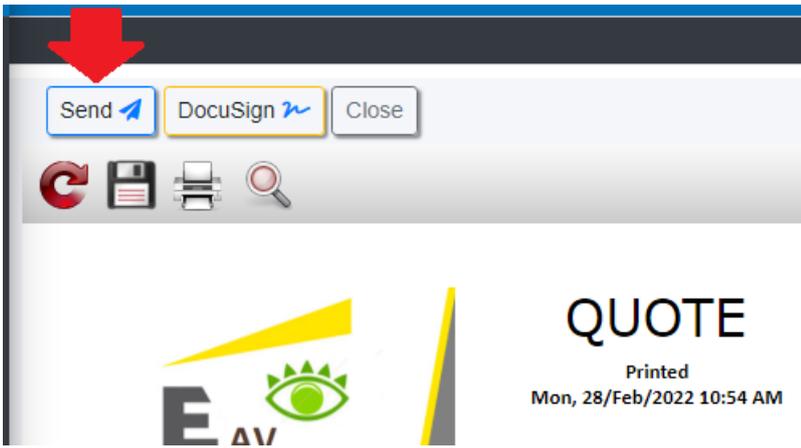
Click to add Signature



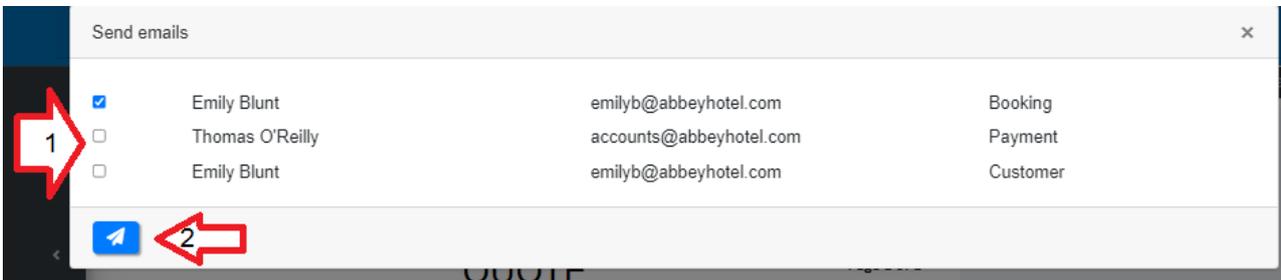
File saved with name:
WOWAUD-00001Q-V007.pdf

OK

Then use the  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 



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 [General information at this link](#)
2. Enlarge the body paragraph by dragging the window from point 2 below

Rentalpoint email send ×

Email address CC To Self

To

Subject

Standart text **1**

Signature

Emily,
See attached quotation as requested. Please e-sign and return to secure your booking.
We look forward to working with you!
Best regards,
Sally Hansen

2

Attached files	Size		Add
No attached files.			

Prompt for email password before sending email

then click

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.

Rentalpoint email send ✕

Email address CC To Self

To

Subject

Signature

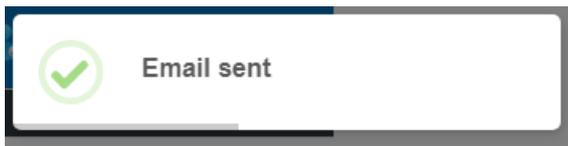
Please enter email password ✕

Save password:

WOWAUD-00001Q

Attached files	Size
No attached files.	

Prompt for email password before sending email



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

PARIS ONTARIO L5L 3K3
Canada

Show Start: Wed, 02-Feb-22 11:37 AM
Show End: Wed, 02-Feb-22 6:00 PM
Pickup: Wed, 02-Feb-22 6:00 PM

Address: 998 Chambrassii Street
Elora Ontario K5G3F4

Contact: Samuel Golden
Phone:
Email: sholden@gmail.com

Contact:
Phone:

QTY	DESCRIPTION	DAYS	UNIT RATE	DISC %	EXTENDED
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Heading Totals

Main Body

7,800.00

Rental \$ 7,800.00

Total Due: \$ 7,800.00

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Click to add Signature

<https://rentalpointsoftware.com/4/RPMVC/Sign/Index/npctnvdjilpnpxmqouzvjgh>



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

Please sign document

Date: 28 Feb, 2022
Show: WOW Winter Fete Feb 2022
Booking: WOWAUD00001
Document: WOWAUD-00001Q-V007.pdf
Your name: RentalPoint Support Use as Signature

Slope: -4 Slant: 12 Size: 76

Signature

RentalPoint Support

Clear

Review, Sign & Accept
Please read your terms of service as it contains important information regarding the scope and conditions of this proposal. To electronically sign, type your name, accept the terms and click accept proposal.

I accept the above terms

By clicking accept, you agree to the terms of this proposal. If you have any questions please don't accept and submit your question in the section below.

Accept Proposal

QUOTE

Job: WOWAUD00001
Status: Confirmed
PO #: 564
Bill: WOW Winter Fete Feb 2022
Showname: WOW Winter Fete Feb 2022
Terms: * Cash on delivery

PREPARED FOR	DATE	JOB SITE
WOW Audio & Events 8876 Westonsland Street Paris Ontario L5L 3K3 Canada	Deliver: Wed, 02-Feb-22 11:37 AM Set Up By: Wed, 02-Feb-22 11:37 AM Show Start: Wed, 02-Feb-22 11:37 AM Show End: Wed, 02-Feb-22 6:00 PM Pickup: Wed, 02-Feb-22 6:00 PM	Room: Heritage Park Address: 998 Chambrassii Street Elora Ontario K5G3F4

QTY	DESCRIPTION	DAYS	UNIT RATE	DISC %	EXTENDED
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Heading Totals
Main Body 7,800.00
Rental \$ 7,800.00
Total Due: \$ 7,800.00

By signing below, the undersigned acknowledges their authority to accept this quotation and any terms outlined within on behalf of WOW Audio & Events

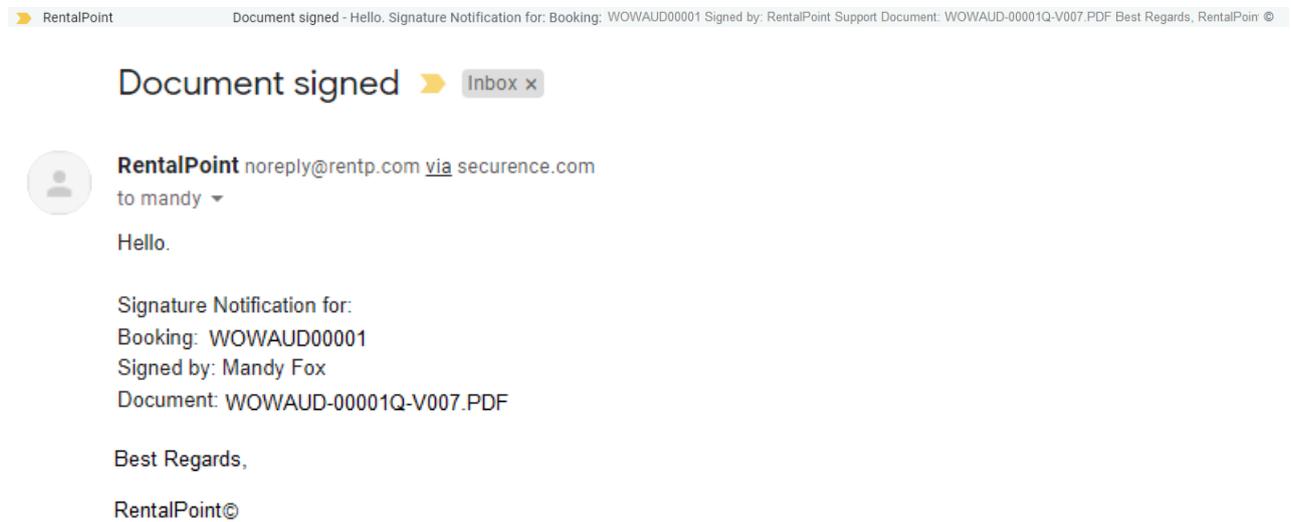
Click to add Signature

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.

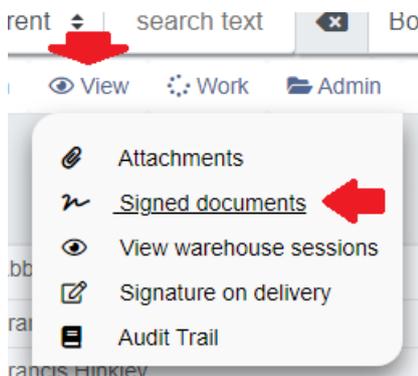
Document signed

Signed Documentation Attached to the Booking

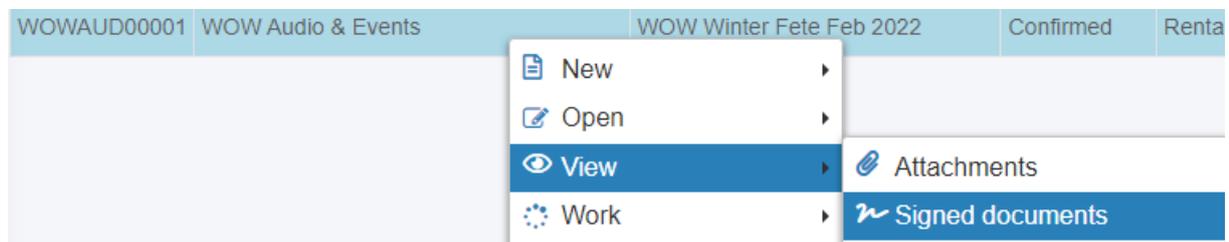
Once the document has been signed, the sending operator will receive an email notification



Highlight the booking, then click on View Attachments



OR from right click menu



Click on any document link to see signage details

The screenshot shows the RentalPoint3 interface. On the left, a table lists documents with columns for Data, Signer, and Document. The document 'WOWAUD-00001Q-V007.pdf' is highlighted. Below the table is a 'RentalPoint Support' logo. On the right, a quote document is displayed, including the EAV logo, job details, and a table of items with columns for QTY, DESCRIPTION, DAYS, UNIT RATE, DISC %, and EXTENDED. The total due is \$7,800.00.

Data	Signer	Document
2/24/2022 4:26:39 PM		WOWAUD-00001Q-V002.pdf
2/24/2022 4:29:22 PM		WOWAUD-00001Q-V003.pdf
2/24/2022 4:41:42 PM		WOWAUD-00001Q-V004.pdf
2/24/2022 4:57:20 PM	Mandy Fox	WOWAUD-00001Q-V005.pdf
2/24/2022 5:10:40 PM	Mandy Fox	WOWAUD-00001Q-V006.pdf
2/28/2022 12:35:31 PM	RentalPoint Support	WOWAUD-00001Q-V007.pdf

QTY	DESCRIPTION	DAYS	UNIT RATE	DISC %	EXTENDED
20	RF 15 Floor Standing Speaker	3	80.00		4,800.00
5	Sigma fp L Mirrorless Digital Camera	3	0.00		2,500.00
1	Sigma fp L Mirrorless Digital Camera	3	0.00		500.00
Heading Totals					
Main Body					7,800.00
					Rental \$ 7,800.00
					Total Due: \$ 7,800.00

Review All E-Signature Documents

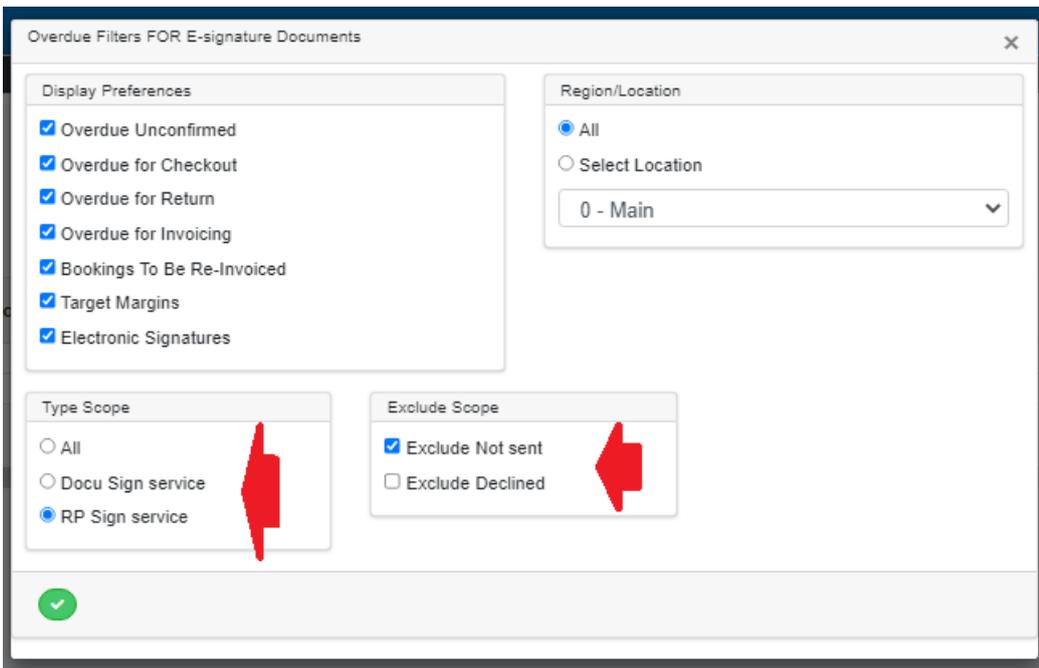
See all e-signature documents under the Action Lists menu option

Fig 1.1

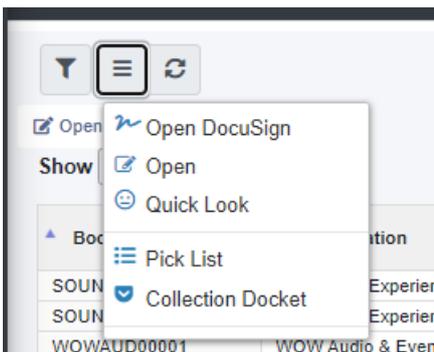
The screenshot shows the RentalPoint3 interface with the 'E-signature Documents' list. The 'Action Lists' menu is open, and the 'Electronic Signatures' option is highlighted with a red arrow. The list of documents includes columns for Booking, Organisation, Show Name, Out date, In date, Salesperson, Amount, Progress, Sign, Date, and Type.

Booking	Organisation	Show Name	Out date	In date	Salesperson	Amount	Progress	Sign	Date	Type
SOUND00015	SoundByte Experience		1/28/2022 12:00:00 AM	2/8/2022 12:00:00 AM		0.00	Confirmed	sent	2/23/2022 8:54:10 PM	DocuSign
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
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

1. Use the  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.



2. Access other menu options via  including opening the DocuSign envelope to review directly in your DocuSign account.



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

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 single app to Google's OAuth servers. If your app runs on multiple platforms, each will need its own client ID. See [Setting up OAuth 2.0](#) for more information. [Learn more](#) about OAuth client types.

Application type *
Desktop app ▼

Name *
RP3 Mail

The name of your OAuth 2.0 client. This name is only used to identify the client in the console and will not be shown to end users.

Note: It may take 5 minutes to a few hours for settings to take effect

CREATE CANCEL

and download the json file

Email settings: Use Custom Email Settings

Email Address: info@.....l.com

SMTP Address(Host):-com.mail.protection.ou

SMTP Port: 25 SSL/TLS: Not used

My smtp server requires authentication

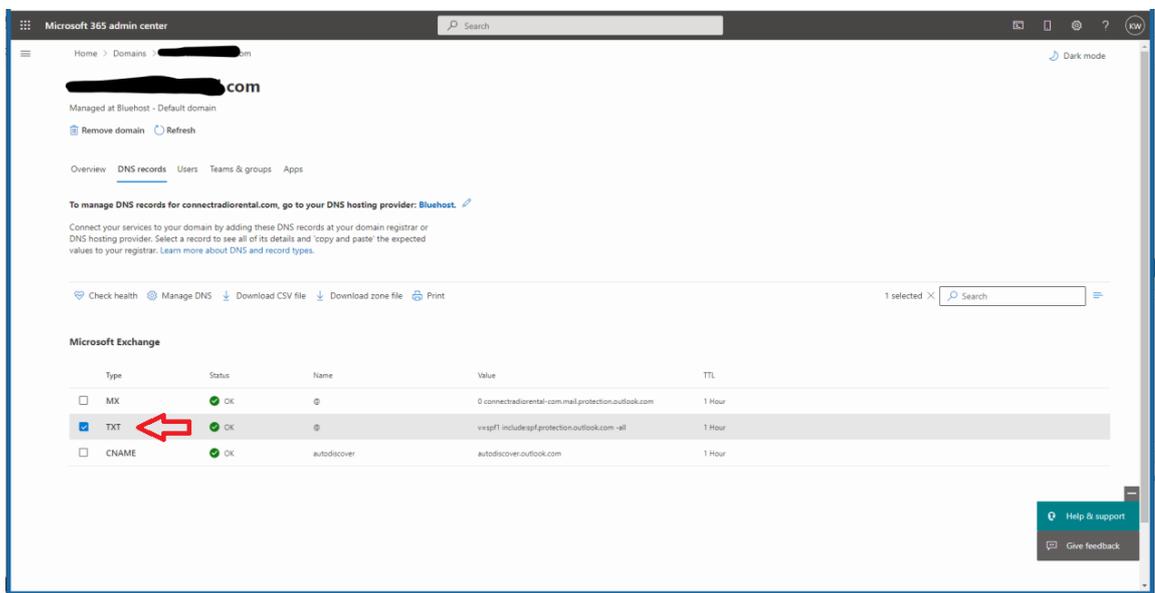
- o Configure email settings in web.config file

```

<system.net>
  <mailSettings>
    <smtp deliveryMethod="network" from="info@.....l.com">
      <network host=".....-com.mail.protection.outlook.com" port="25" enableSsl="false" userName=".....l.com" password="" />
    </smtp>
  </mailSettings>
</system.net>
<appSettings>
  <add key="useGmailApi" value="false" />
  <add key="webpages:Version" value="3.0.0.0" />

```

- o 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



RentalPoint3 Fast Report Templates

In RentalPoint3, customdesigner.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**

