



# Quick Start Guide: eSignature

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# Overview

eSignature allows for capturing signatures electronically for lease documents generated via the Click & Lease software. This document describes how to activate and use the eSignature feature of the program.

## About eSignatures

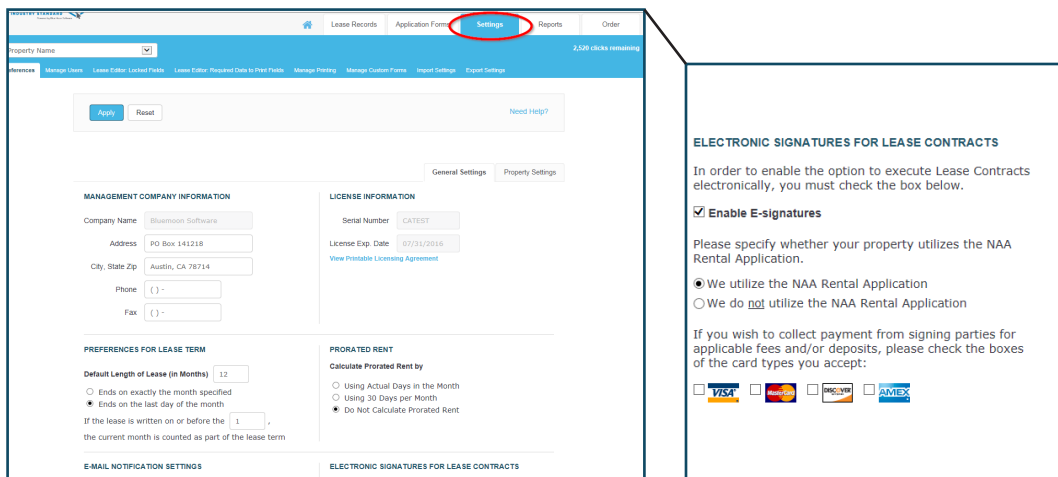
The eSignature feature enables property owners to collect signatures electronically without the need to collect traditional handwritten signatures from the parties to the lease contract. Documents signed electronically have the same legal consequences as those signed using the traditional handwritten method.

While Blue Moon does not preserve lease documents generated for E-signature collection beyond an initial 30-day period (it is recommended that you save and/or print a copy of the document prior to expiration), signature information recorded via the eSignature feature can be accessed in the program indefinitely.

## Activating the eSignature Feature

Before you can begin collecting electronic signatures, you must first activate this feature by performing the following steps:

1. Log into the Click & Lease program online.
2. Click the **Settings** tab (keep in mind an administrator-level user ID is required to access this section of the program).
3. Under the heading labeled **Electronic Signatures**, check the **Enable eSignatures** box.
4. If applicable, select the credit card types (MasterCard, Visa, etc.) that you accept for payment of fees and/or deposits which can be collected from the residents at the time of signature.



5. Click the **Apply** button at the top of the screen

# Requesting eSignature for Lease Documents

You can request eSignatures for lease documents by performing the following steps:

1. Open a lease record in the lease editor using the **Create Lease** or **Edit Lease** option.

**NOTE:**

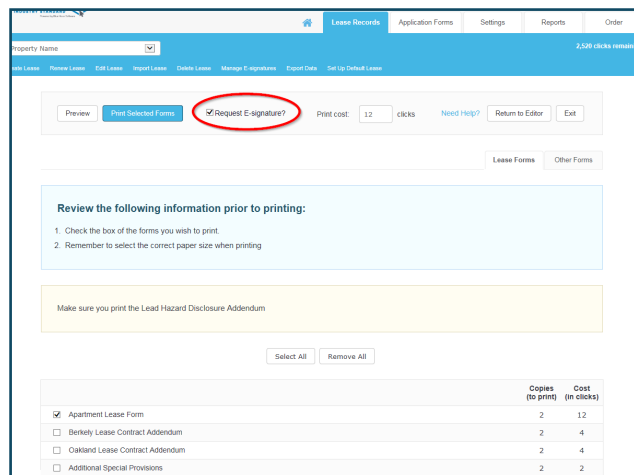
If you use a 3rd-party property management program such as Yardi Voyager, Intuit MRI, or RealPage OneSite, you may export to Blue Moon per the standard process you currently use for that product.

2. Enter/update relevant field information in the lease editor as applicable.

**NOTE:**

The Beginning Lease Date must fall AFTER the current date, otherwise the lease document cannot be signed electronically.

3. When you have verified that field values shown are complete and accurate, click the **View Print Menu** button.
4. On the **Print Menu** screen make sure that the lease form is selected for printing. You may also select a combination of other forms/addenda to include in the lease package.
5. Check the box labeled **Request eSignature** located to the right of the **Print Selected Forms** button. Some forms requiring additional manual completion by residents prior to signature may become disabled when this option is selected.



**NOTE:**

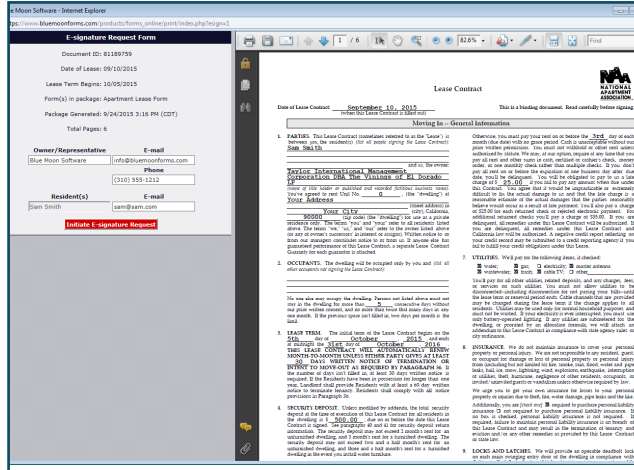
If the **Request eSignature** checkbox is not visible, make sure that you have completed the steps listed in the section of this document titled *Activating the eSignature Feature*. If the option is visible but disabled, make sure that the lease contract is selected for printing, and verify that the Beginning Lease Date entered is AFTER the current date.

6. Once you have selected all of the forms you wish to include in the lease document, click the **Print Selected Forms** button. Your clicks counter will be charged at this time regardless of whether you continue with the eSignature request process.

**NOTE:**

At this time the Lease Contract Guaranty cannot be included in the lease documents generated for eSignature as that form requires manual completion by the guarantor parties prior to execution.

- 7. Wait a few moments for the lease document to load in a new window. A column with the heading **eSignature Request Form** should appear to the left of the lease document. If it does not, please verify that you have completed all of the steps prior.



- 8. Enter the relevant information shown in the **eSignature Request Form** including the owner's or owner's representative's name and E-mail address, as well as the E-mail addresses of the parties from whom you are requesting signature.
- 9. If you wish to collect a fee from the signing parties at the time of signature, you may specify the total fees/deposits to be collected along with a description (e.g., "\$35.00 Application Fee + \$250 Security Deposit").
- 10. After you have inspected the lease document for accuracy, you may submit it to all parties for electronic signature by clicking the **Initiate eSignature Request** button.

## The eSignature Collection Process

Upon submitting an eSignature request, a confirmation E-mail detailing the transaction will be sent to the specified owner's/owner's representative's E-mail address. The signing parties will also receive emails notifying them that a lease document requires their electronic signature.

Each signer will be able to view the lease document prior to providing his/her signature and will be given an opportunity to provide payment via credit card for any applicable fees and/or deposits.

**NOTE:**

Credit card payments are not processed automatically via the eSignature feature. Payment information provided by signing parties can be retrieved by the leasing agent from within the Click & Lease program.

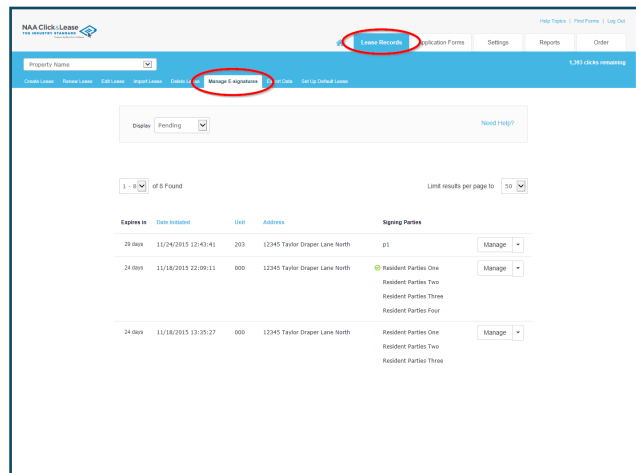
The property owner/owner's representative will receive an additional notification E-mail after each party applies his/her signature to the lease document. Once all parties have signed the document, the owner/owner's representative will receive a final notification advising him/her that the lease is ready to be executed.

# Executing Electronically Signed Lease Documents

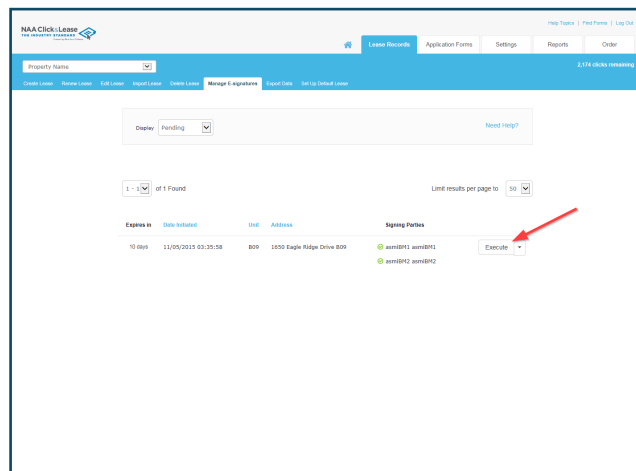
Even after electronic signatures from the signing parties have been collected, the lease shall not be considered executed until the property owner/owner's representative has applied his/her own signature to the document.

A lease document can be executed by performing the following steps:

1. Log into the Click & Lease program online.
2. Click the **Lease Records** tab and then click the **Manage eSignatures** option.



3. All pending eSignature records will display. To adjust which records display on this page use the **Display** menu to select from Pending, Entire History, Executed, or Lapsed.
4. Each record displays the names of the signing parties for that lease. A green checkmark will appear next to the names for residents who have submitted their eSignatures. Click on **Manage** to the right of any record to view more details. Or, if all parties have signed you may click on **Execute** to the right of that record.



5. To apply your signature and execute the lease, enter your full name and initials in the appropriate fields in the **Execute Lease Package** section. Click **Execute Lease Now**.

The screenshot displays a web application interface for executing a lease package. At the top, there is a navigation bar with tabs for 'Lease Records', 'Application Forms', 'Settings', 'Reports', and 'Order'. Below the navigation bar, there is a search field for 'Property Name' and a 'View Lease Package' button. A green notification bar states 'This lease package is ready to be executed'. Below this, a red-bordered box titled 'Execute Lease Package' contains the following text: 'By entering your name and clicking the button below, you can apply your own electronic signature to execute the lease document.' Below the text are two input fields: 'Full Name' and 'Initials', followed by an 'Execute Lease Now' button. At the bottom of the interface, there is a 'Signing Parties' section with two resident profiles. Each profile includes a 'Resend Request' button. The first resident is 'Resident 1' with name 'asnu@M1 asnu@M1' and email 'patil.asmita@gmail.com'. The second resident is 'Resident 2' with name 'asnu@M2 asnu@M2' and email 'asmorentcafe@gmail.com'.

Upon executing the lease, you are advised to print and/or save a final copy of the lease document to which a receipt page has been appended, detailing all of the signatures collected. The signing parties will also receive confirmation via E-mail once the lease is executed, and they are also advised to print and/or save a copy of the executed document for their records.

## Merging Online Rental Applications into the Lease Document

Properties which utilize the Online Rental Application feature to capture applicant data can merge the resulting Rental Application form into the lease document that is generated for eSignature.

This feature eliminates the need to print a Rental Application form for each applicant prior to generation of the lease and provides the means to collect signatures from all applicants/residents along with the other forms in the lease document in a single transaction.

For more information about the Online Rental Application feature, visit <http://www.bluemoonforms.com/?p=resources/onlinerentalapplication>.

You can tie an applicant to a lease record (requires activation of the eSignature feature) by following the steps below:

### NOTE:

If you use a 3rd-party property management program, such as Yardi Voyager, Intuit MRI, or RealPage OneSite, you may export to Blue Moon per the standard process you currently use for that product.

1. Click the **Application Forms** tab, then click the **Online Rental Applications** option.
2. Locate the record for the applicant you wish to move into a unit, then click the **Move In** link to the right of that record.
3. In the interface that follows, enter the unit number to which you wish to link the applicant, then click the **Find** button (or click the **Find All** button to find all the existing lease records for this property).

If a record matching your search criteria is returned, you have the option to move the applicant into a new lease record or add him/her to an existing record.

To link the applicant to a new record, select **Overwrite**, **Duplicate**, or **Pre-lease** from the pull-down menu and click **New**.

Otherwise, click **Add** to insert the applicant as a resident of an existing lease record.

4. At this point, the selected lease record will appear in the lease editor with the applicant selected for move-in appearing in the first available resident field.

**NOTE:**

The applicant/resident's name is greyed out and cannot be modified. This is because the resident name is tied directly to the name contained in the application record. If this name is not correct, then it follows that the name that appears on the Rental Application is also invalid, and therefore, an application containing the correct name would need to be resubmitted and reimported into the lease record.

5. Click the **Save** button to apply changes.

To move additional applicants into the unit, exit the lease editor and repeat the steps outlined above.

## Important Information Regarding eSignature Records

Lease documents generated for eSignature are active for a period of 30 days from the time of generation and can only be executed during that time. Likewise, pending lease documents can be viewed by the property owner/owner's representative and the signing parties as needed only while they are active in the system, after which, they are permanently deleted from the Blue Moon server. Blue Moon Software advises all parties to print and/or save a copy of the lease document prior to its expiration.

A lease package can only be signed electronically up until the end of the first day of the lease term. Likewise, an eSignature request cannot be initiated for a lease document if the Beginning Lease Date specified for that record has already passed. If the lease document has not been signed by all residents prior to the start of the lease term, the transaction will be removed from "pending" status in the program, and no further signatures can be collected for the document. In that event, the property manager may choose to adjust the lease term and generate the modified lease package for eSignature as appropriate.

Lease documents awaiting eSignature are locked and therefore not affected by additional changes made to the source lease record once the document has been generated. Please be sure that the contents of the lease document are complete and accurate prior to submitting it for eSignature. If you need to change the contents of a lease package after it has been sent out for signature (but before it has been executed), you should first delete the transaction record from the **Manage eSignatures** section. You may then modify the record as needed in the lease editor and follow the steps for requesting eSignature again.

Once a lease document has been executed, the signatures collected electronically during the transaction are stored on a permanent basis (unless expressly deleted by the user) in the program. While the transaction is active, the eSignature receipt page can be accessed by viewing the lease package via the **Manage eSignatures** interface. Subsequent to expiration of the lease document, the receipt can still be accessed by clicking the **View Signatures** button in the same location.

There is no charge for reviewing the lease document from the management console. A clicks charge is only assessed at the time the document is generated.