Quick Start Guide:
eSignature & On-the-Spot App

Updated: October 2017

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Overview

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

As an added enhancement to the eSignature feature, Blue Moon Software now offers an On-The-Spot app which allows you to collect resident signatures on-the-spot in your leasing office. You must first have the eSignature feature activated in order to then activate the On-The-Spot app. Continue reading for more details and instructions.
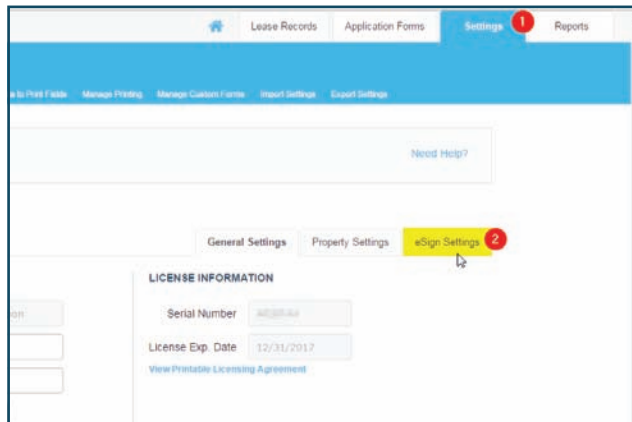
About eSignatures

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

While Blue Moon does not preserve documents generated for eSignature collection beyond a 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.
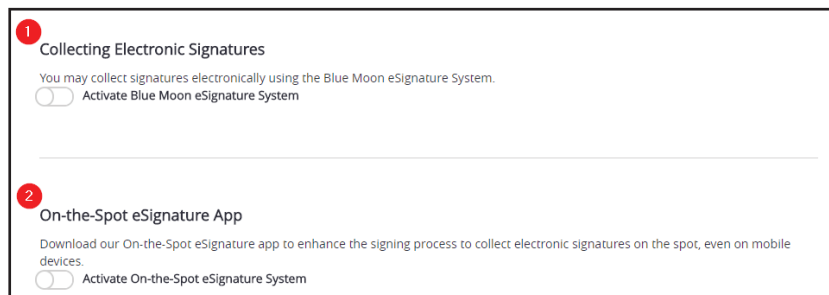
Activating the eSignature Feature

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). Then, click the **eSign Settings** tab.

3. You will see two sections: **Collecting Electronic Signatures** and **On-the-Spot eSignature App**.

4. To enable the eSignature feature, click the toggle button next to "Activate Blue Moon eSignature System." The toggle button will turn green, and additional settings will appear.
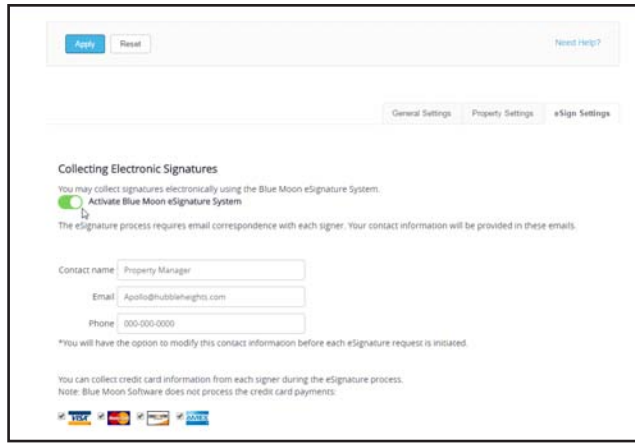
5. When using the eSignature feature, automated email correspondence is sent to each signer. You may enter contact information including a name, email, and phone number that signers may contact your property at in the event that they have questions or concerns regarding their documents.

6. You may also collect credit card information from each signer if a security deposit or other fee is due at the time of signing. Check the box next to each credit card type that your property accepts.


NOTE:
Blue Moon Software does not process credit card payments. If you collect credit card information during the eSignature process, you must then take that information and process the payment following your normal payment processing procedures.

7. If you do not wish to activate the On-the-Spot app, then you're done! Click the *Apply* button at the top of the screen to save your changes. Moving forward, when in the Print Menu, you'll have the option to request eSignature from residents.
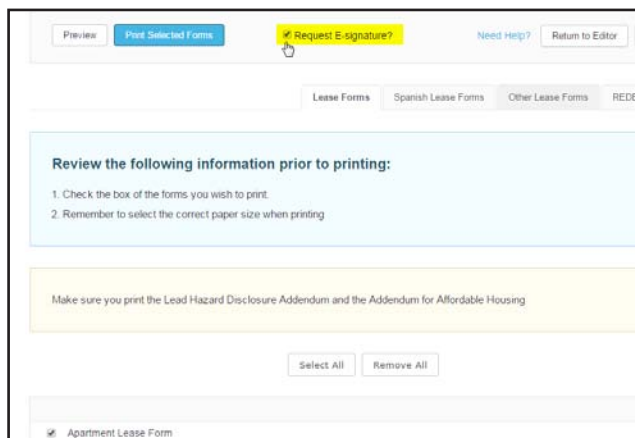
Activating the On-the-Spot eSignature App

Now that you have activated the eSignature feature, you may also activate the optional On-the-Spot app. This added feature allows you to collect electronic signatures on-the-spot in your leasing office using a tablet or other mobile device, making the signing process even quicker for those residents in front of you ready to sign their documents.

> ***NOTE:***
> You MUST activate the eSignature feature in order to activate the On-the-Spot app. And, BEFORE enabling the On-the-Spot app in the Blue Moon settings, you must first download the app onto your mobile device and create a mobile account in the app.
>
> You may activate just the eSignature feature and not the optional On-the-Spot app. But if you wish to use the On-the-Spot app, you must activate the eSignature feature first. If you have additional questions, please contact Blue Moon Technical Support.

To activate the On-the-Spot app follow these steps:

1. First, activate the eSignature feature by following the steps described in the previous section titled "Activating the eSignature Feature."

2. Then, download the On-the-Spot app in the app store of your mobile device. (The app is available in both the iTunes and Google Play stores, and it's free!) Search for Blue Moon Software in the app store and you'll find On-the-Spot available for download.

3. Once installed, you must create an account in the app. Click the **Sign Up** link to do so.
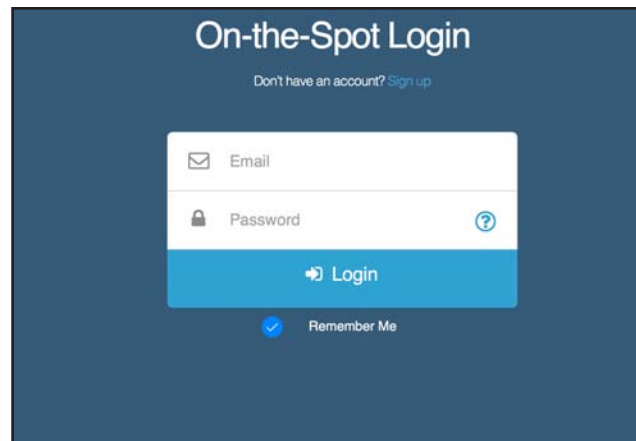
4. When creating an account, you'll be prompted to enter the following information: Account Number, Property ID, Email, Password.
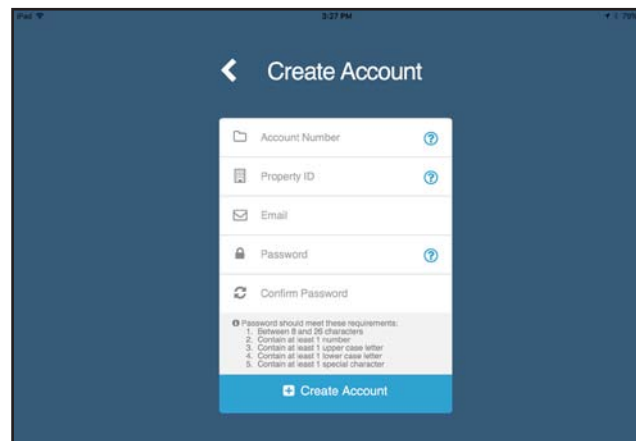
- Enter your Blue Moon account (or license number). You use this number to log into your Blue Moon account online. If logged into Blue Moon, you can view the account number in SETTINGS > GENERAL SETTINGS.
- In SETTINGS > PROPERTY SETTINGS you can view your Property ID.
- Enter a valid email address.
- Enter a password. Then, confirm the password.

5. Once all the required fields are completed, click the **Create Account** button.

6. You'll be returned to the Log In screen. Log into your account using the email address and password you entered on the previous screen.

7. Now, go back to SETTINGS > eSIGN SETTINGS in your Blue Moon account online, and click the toggle button next to "Activate On-the-Spot eSignature System." The toggle button will turn green and additional settings will appear.

8. The account number and property ID displayed to you were used to create your mobile account in the download-able On-the-Spot app.

9. Click the **Apply** button at the top of the screen to save your changes.

Requesting eSignatures and/or On-the-Spot eSignatures for Documents

You can request eSignatures for 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, MRI, RealPage, etc. you may export to Blue Moon per the standard process you currently use for that product.

2. Enter or update relevant field information in the lease editor as needed.

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 select the forms you wish to send to include with the eSignature request. Then, check the box next to *Request eSignature?* located to the right of the *Print Selected Forms* button.
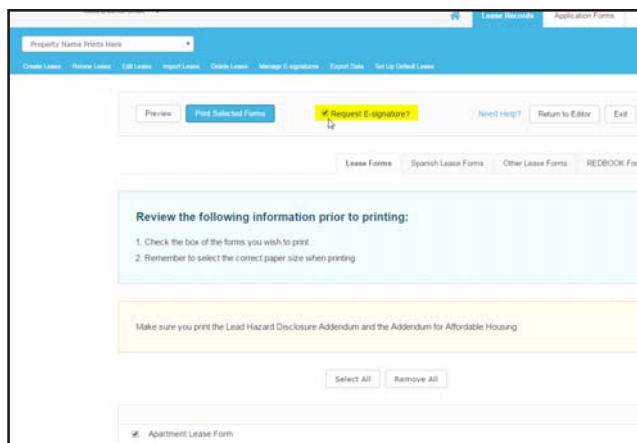
NOTE:

Some forms requiring additional manual completion by residents prior to signature may become disabled when the *Request eSignature?* option is checked.

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 forms have been selected in your print menu.

5. Click the *Print Selected Forms* button.

6. The document(s) will load in a new window and a section to the left of the document(s) will display information about the record including 1) how many forms are included, 2) the Lease Contract Date, 3) the Date the Lease Term Begins, and 4) the Resident Names.
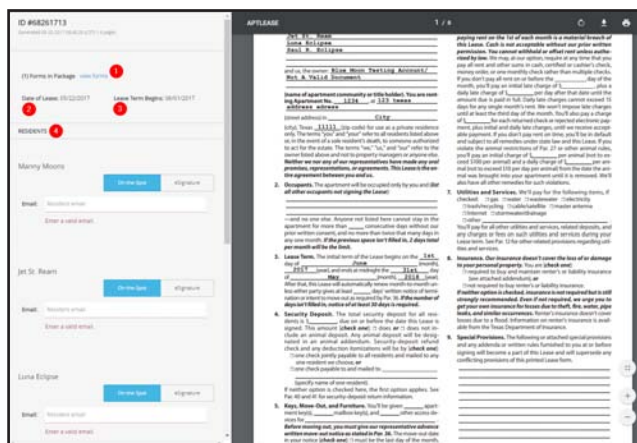
7. Enter a valid email address for each resident. If you've activated the On-the-Spot eSignature app, you'll need to choose whether each resident is signing via the eSignature system or On-the-Spot.
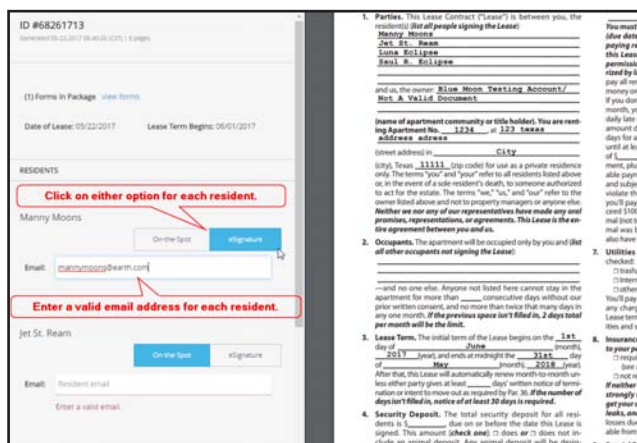
- If the resident is signing via the eSignature system, they will receive an email at the address you've specified that includes a secure link for them to follow to complete the signing process online.

- If the resident is signing via the On-the-Spot eSignature app, they will view and sign their documents immediately on-the-spot in your leasing office using the mobile device you've downloaded the On-the-Spot app to.

NOTE:
If you've only activated the eSignature feature and not the On-the-Spot eSignature app, you will not see the differing toggle buttons as shown in the screen above.

8. Scroll down the left side of the screen to complete the "Owner/Representative" and "Fees" sections. If you've entered default contact information in *Settings > eSign Settings* (see Page 4, item #5 in this document) this information will automatically populate for you on this screen.

You may modify the information if needed for this request only. If you need to collect a fee at the time of signing, you may enter that fee and the required fee description in the provided fields.

9. After you have inspected the document(s) for accuracy, you may submit to all parties for electronic signature by clicking the *Initiate eSignature Request* button. You'll receive a confirmation message.

Managing Electronically Signed Documents

Upon initiating an eSignature request, an email is sent to each signer.

NOTE:
Only residents signing via the eSignature feature will receive an email. Residents signing via the On-the-Spot eSignature app will complete the signing process immediately in the leasing office with the mobile device you've downloaded the On-the-Spot app to.

Each signer will be able to view the documents simultaneously. Once any resident makes a selection on a form and signs it, the other residents are notified on their screen that another resident has updated the form.

The owner/owner's representative will receive an email notification once all the residents have signed the document(s). The owner/owner's representative will then need to log into their Blue Moon account to sign and finalize the process.

Once the document(s) are signed by all parties, each resident and the owner/owner's representative will receive an email confirmation including a link to download their completed document(s).

Collecting Signatures using the eSignature System

Document(s) can be finalized 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.
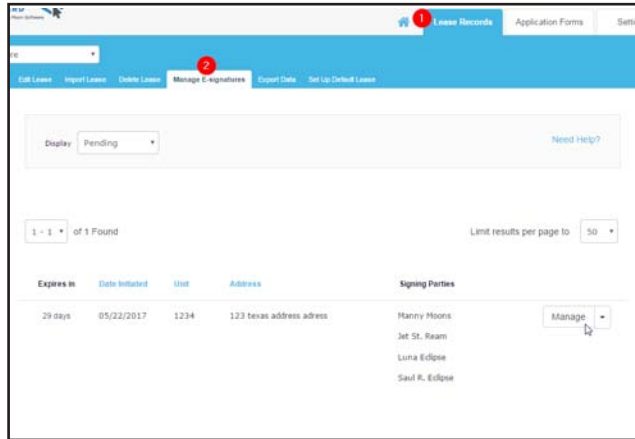

NOTE:
All pending eSignature records will display. To adjust which records display on this page use the **Display** menu to select from Pending, Entire History, Executed, or Lapsed.

3.   Each record displays the names of the signing parties (residents). A green checkmark will appear next to the names of residents who have signed their documents. Click on **Manage** to the right of any record to view more details. (If all the residents have signed, the button will instead say **Execute**.)

4.   The following screen displays additional information about the eSignature request including: 1) resident names, 2) resident email addresses, 3) the signing method each resident chose, and 4) the signature status.
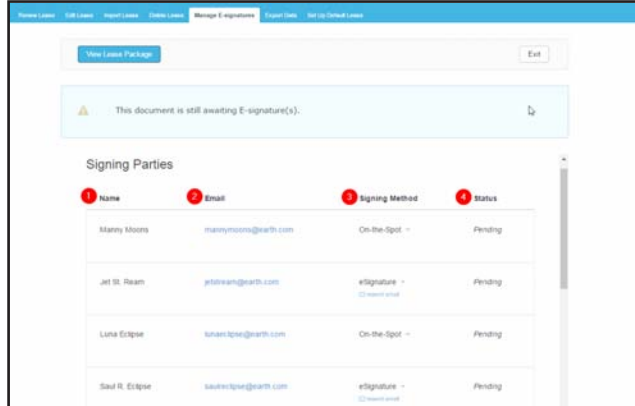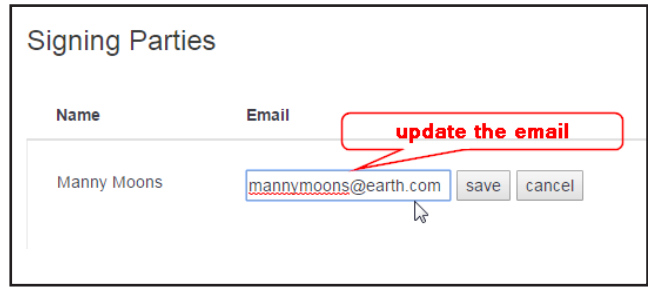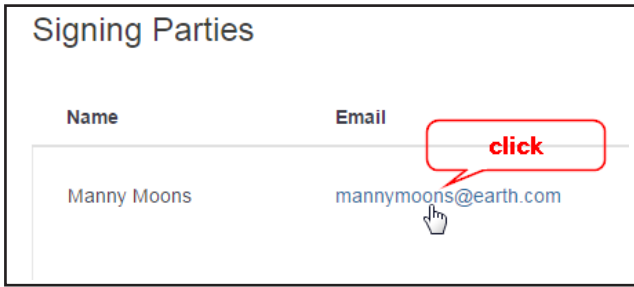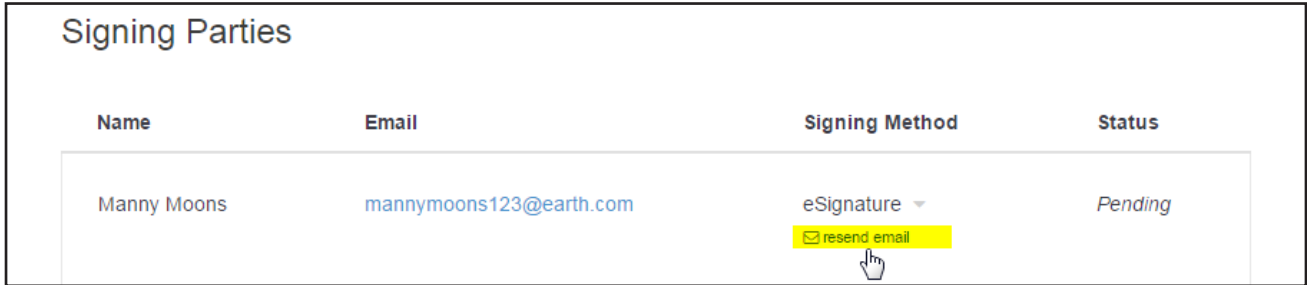

NOTE:
The top of the screen displays a general status of the record. A record will either be awaiting signatures, or will be ready for you to execute.
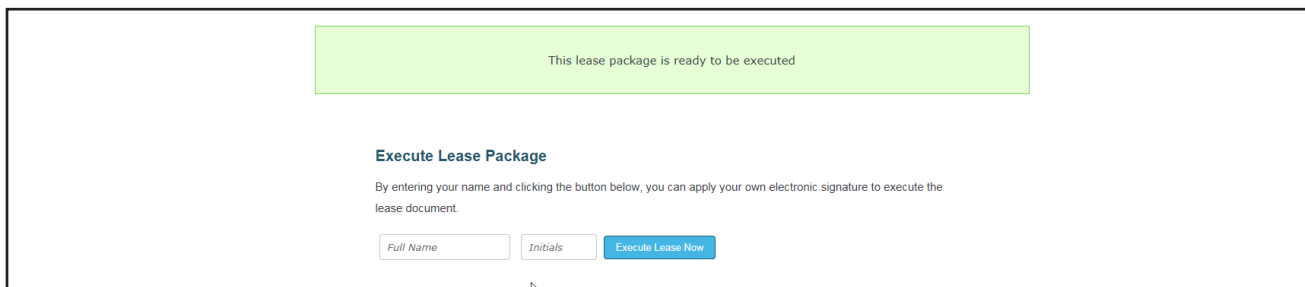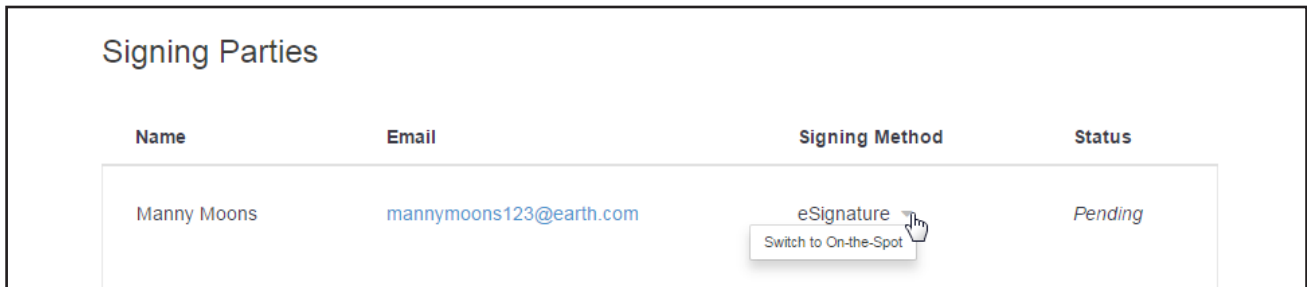
If you need to update any resident's email address, you may do so by clicking on the email address. You may then update the address and click **Save**.

Signing Parties

Name	Email
Manny Moons	mannymoons@earth.com

click

Signing Parties

Name	Email
Manny Moons	mannymoons@earth.com save cancel

update the email

To resend the request to the new email address, click on **resend email** underneath the signing method.

Signing Parties

Name	Email	Signing Method	Status
Manny Moons	mannymoons123@earth.com	eSignature ⌄	Pending
		✉ resend email	

If you need to change a resident's signing method, for instance, they originally requested to sign via eSignature (email) but they've instead later walked into your office and would rather sign on-the-spot, simply click the triangle next to the signing method and select the new method. (You cannot change the signing method if the resident has already signed their document(s).)

Signing Parties

Name	Email	Signing Method	Status
Manny Moons	mannymoons123@earth.com	eSignature ⌄	Pending
		Switch to On-the-Spot	

Remember, if a resident is switching to the On-the-Spot method they will complete the signing process in your leasing office on the mobile device you've downloaded the On-the-Spot eSignature app to. Conversely, if a resident is switching to the eSignature method, you'll need to click **resend email** to trigger the email notification to them.

You will only be able to toggle between the two signing methods if you have both the eSignature and On-the-Spot app features activated in your Blue Moon settings.

5.   If all the residents have signed and you are ready to sign and finalize the process, enter your full name and initials in the appropriate fields at the top of the screen.

6.   Click **Execute Lease Now**. A pop-up message will confirm that the document(s) have been signed.

We advise you to print and/or save a final copy of the document(s) to which a receipt page has been appended, detailing all of the signatures collected. The signing parties will also receive confirmation via email once the document(s) are signed, and *they* are also advised to print and/or save a copy of the executed document for their records. The receipt page can be accessed by clicking the **View Lease Package** button via the **Manage eSignatures** interface. Subsequent to expiration of the documents, the receipt can still be accessed by clicking the **View Signature Receipt** button in the same location.

Active Period for eSignature Requests

When 30 days of inactivity has passed for any eSignature request, that request will expire and no longer be accessible. For example, if a leasing agent creates a record and initiates an eSignature request but no residents ever eSign their documents and no activity occurs for 30 days, that eSignature request expires and the lease document attached to that request is deleted.

Once an eSignature request is initiated, a 30-day countdown begins. If three days later, a resident eSigns the document(s), the 30-day countdown starts over. If the next day the second resident eSigns the document(s), the 30-day countdown starts over again. In essence, each time any activity occurs for this eSignature request, the 30-day active period is extended.

Once you (the leasing agent) finalize the process and eSign the documents, they will remain accessible in Blue Moon for 30 days from that date of final activity. IT IS VERY IMPORTANT YOU DOWNLOAD OR PRINT THE COMPLETED DOCUMENTS WITH THE eSIGNATURE RECEIPT PAGE TO KEEP FOR YOUR RECORDS. If you do not save or print the finalized documents within this active period, and the expiration date passes, they are no longer accessible!

## Possible eSignature Status Messages You May See When Viewing Records

Awaiting eSignatures

If the beginning date of the lease term has not passed yet and the eSignature request has not expired, but the document(s) has not yet been signed by ALL residents, you will see the following status message:

> This document is still awaiting E-signature(s).
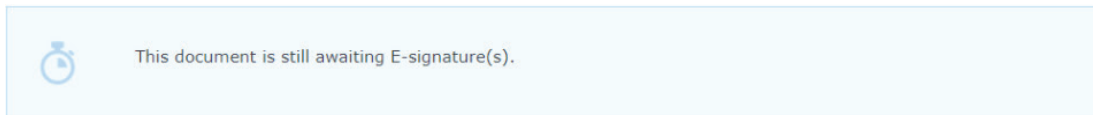
Ready to Sign

If the document(s) has been eSigned by ALL residents, the beginning date of the lease term has not passed yet, and the eSignature request has not expired, you will see the following status message:

> **GO!** This document is ready for you to sign.
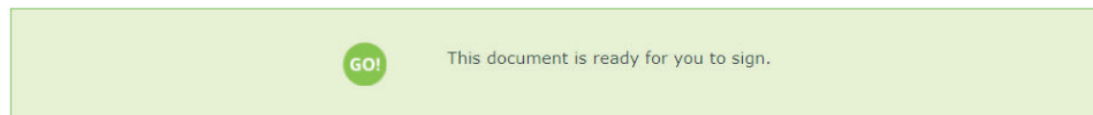
Signing After the Beginning Date of Lease Term

If the document(s) has been eSigned by ALL residents, the beginning date of the lease term has passed, but the eSignature request has not yet expired, you will see the following status message:

> ⚠ This document is ready for you to sign.
> You are signing a document after its beginning date.
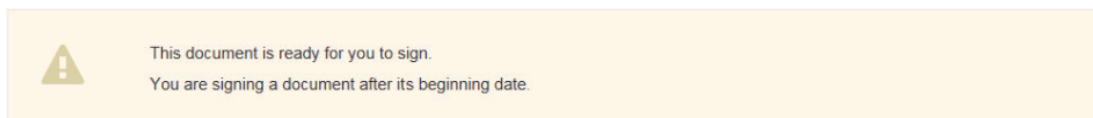
Document(s) Executed Successfully

If the document(s) has been eSigned by ALL parties (residents and owner representative), you will see the following status message:

> ⊘ This document was signed 5/15/2017 12:44:54 12:44 PM (CDT)
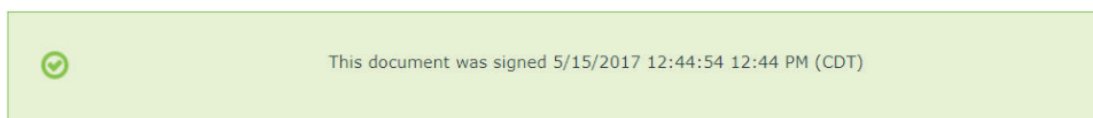
Expired Document(s) with No Owner eSignature

If the document(s) has been eSigned by ALL residents, but you (the leasing agent/owner representative) did not eSign the document(s), and the eSignature request has expired, you will see the following message:

> **STOP** This document has expired and cannot be signed.
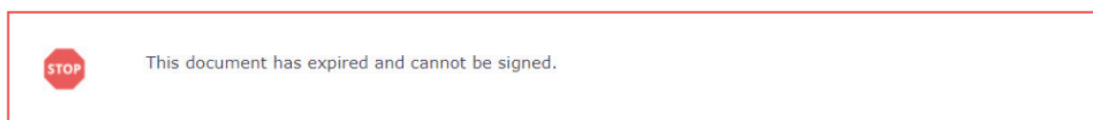
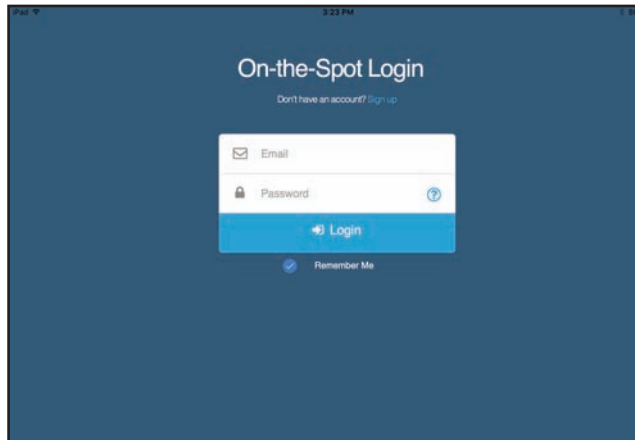**Expired Document(s) with No Resident eSignature**

If the document(s) has not been eSigned by ALL residents and the eSignature request has expired, you will see the following message:
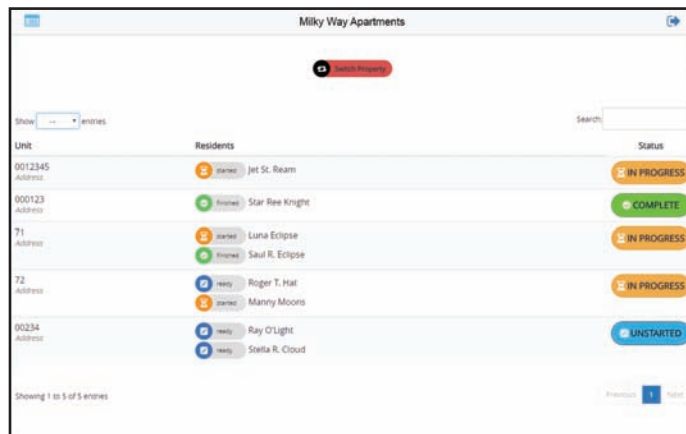

Collecting Signatures using the On-The-Spot App

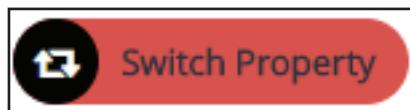Document(s) can be finalized by performing the following steps:

*1.* Log into the On-the-Spot app on your mobile device.

2. Once logged in, you'll see a list of pending eSignature requests.

If there are multiple properties linked to your Blue Moon account, you'll see a **Switch Property** button at the top of the screen.

Clicking the button allows you to switch to another property's view so that the pending eSignature requests for the selected property are displayed.
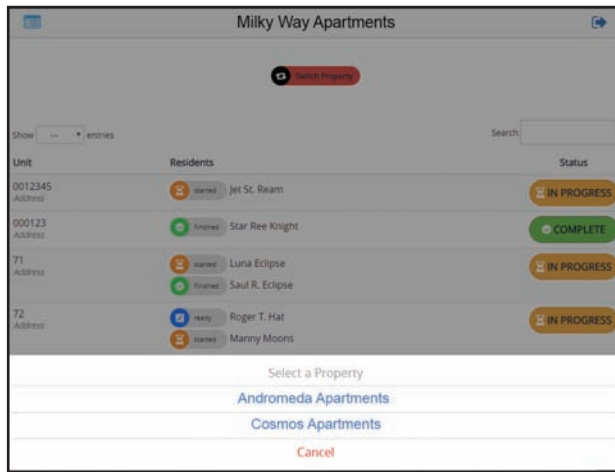
NOTE:

Most accounts are established for just one property. Only in special circumstances will your account have multiple properties linked to it, so you may not see the **Switch Property** button.

You may adjust the number of records displayed by using the **Show Entries** drop-down menu. You may also search the records by unit number or resident's name using the **Search** field.

If the signing process for a record *has not* started, the status button will read "Unstarted" and appear blue. The status next to each resident's name will be "ready."

If the signing process for a record *has* started, the status button will read "In Progress" and appear orange. The status next to each resident's name will vary between "ready," "started," and "finished."


3. If you're using the On-the-Spot app you likely have a resident in front of you ready to sign their documents. Locate the resident's record and click the button in the "Status" column.

4. The next screen will ask "Who is Signing?" Tap the signer's name.
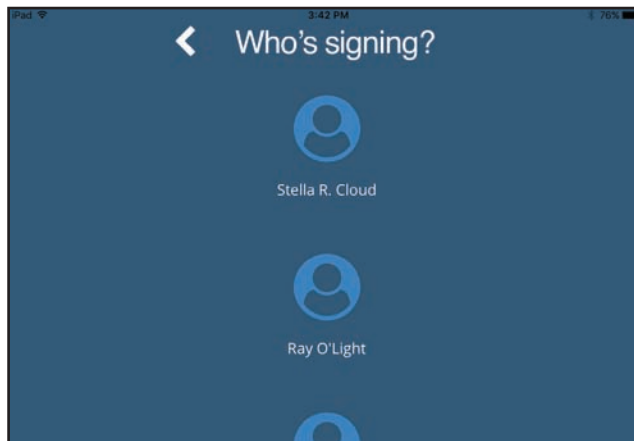
At this point, you'll hand the tablet to the signer.

5. Signing documents via a mobile device requires two-step verification to ensure the person completing the process is who they say they are. The signer will choose a preferred method to receive a PIN.
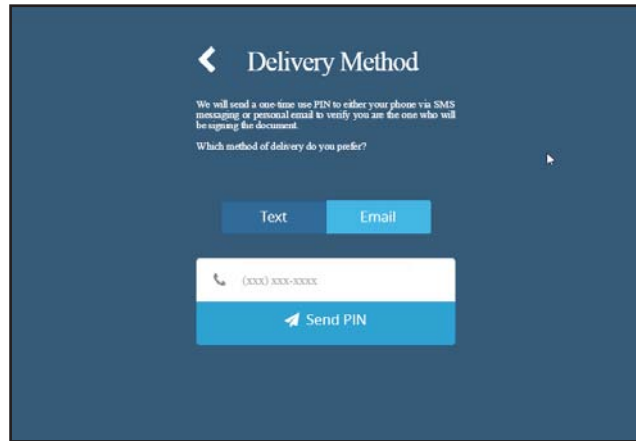
6. Their choices include by text message or by email. Once a method is selected and either a phone number or email address is entered, the signer will tap **Send PIN**.
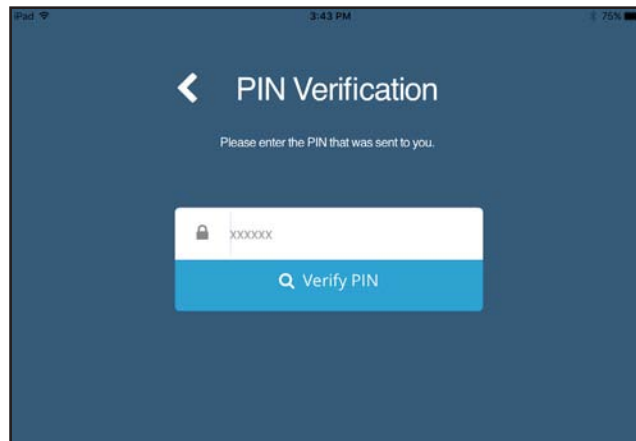
7. The signer will receive their PIN via text or email and will then need to verify the PIN by entering it on the next screen and tapping **Verify PIN**.

8. If the signer has entered the correct PIN, the signing process then begins. They will agree to a Consumer Disclosure, create a digital signature, view their documents, and electronically sign each page.

9. Once the signer is finished, the next On-the-Spot signer will follow steps 5 through 7 to complete the process.

10. Once all the residents have signed their documents, you are then able to sign and complete. You may do so in the On-the-Spot app or in the Manage eSignatures section in your Blue Moon account.
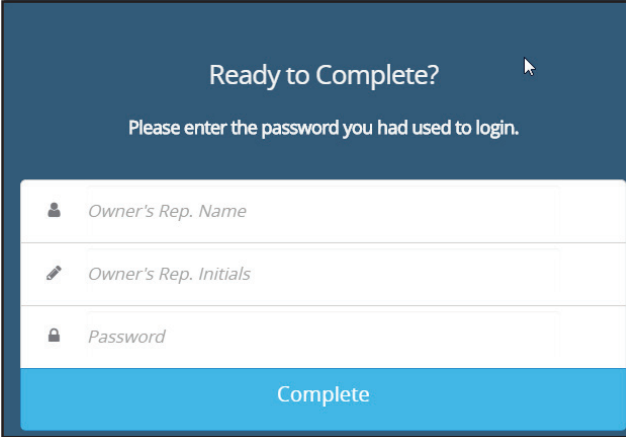
NOTE:
If you wish to sign and complete the process in the Manage eSignature section in your Blue Moon account, you'll follow the steps in the previous section of this document titled "Collecting Signatures using the eSignature System."

If you wish to sign and complete the process in the On-the-Spot app, you'll continue with the steps below.

11. Tap the **Complete** button for the record whose residents have all signed.

12. Enter your name and initials. Then enter the password you used when you created your account in the On-the-Spot app. Tap the **Complete** button.

13. You've just completed the signing process On-the-Spot! You and each resident will receive a confirmation email with a link to the signed documents for download.