

SOP: Digital Contract Signing via DocuSeal

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System: sign.speakerbox.live

Access: start.speakerbox.live → eSign bookmark

Owner: Operations Team (Aaron, Kop)

Last Updated: 11 February 2025

COMPLETE WORKFLOW

STEP 1: Access DocuSeal

1. Navigate to **start.speakerbox.live**
2. Click **eSign** bookmark
3. Lands on Document Templates page

The screenshot shows the DocuSeal interface. At the top left is the DocuSeal logo. To the right is a 'Settings' button with a user icon 'AW'. Below the logo is a navigation bar with 'Document Templates' and two buttons: 'UPLOAD' and '+ CREATE'. The main content area features a template card for 'VENUE HIRE AGREEMENT' by Aaron Winning, dated 05 Feb 02:10 PM. Below the card is a large dashed box with an upload icon and the text 'Upload a New Document' and 'Click to upload or drag and drop'. A 'View Archived' link is visible at the bottom left.

STEP 2: Clone Template

1. Hover over "**VENUE HIRE AGREEMENT**" template card
2. Click "**Clone**" button



Document Templates

VENUE HIRE AGREEMENT



Aaron Winning



05 Feb 02:10 PM

Clone



STEP 3: Name Document

1. Replace "VENUE HIRE AGREEMENT (Clone)" with **promoter's name**
 - Example: "VENUE HIRE AGREEMENT - SROAST ENTERTAINMENT"
2. Leave folder as "Default" (or organize by month/event type)
3. Click **SUBMIT**

Result: Document editor opens

Clone Template ×

VENUE HIRE AGREEMENT (Clone)

Default [Change Folder](#)

SUBMIT

STEP 4: Add Recipients

1. Click **SIGN YOURSELF** button (top left)
2. "Add Recipients" dialog appears

Fill in:

- **First Party:** [Your email] - pre-filled based on active login
 - Example: aaron@speakerboxlive.com or kop@speakerboxlive.com
- **Second Party:** Enter **promoter's email address**

Checkboxes:

- **Preserve order** ← CRITICAL - ensures venue signs before promoter
- **Send Email** ← Automatically sends to promoter after venue signs

Optional: Click "Edit message" to customize email text

3. Click **ADD RECIPIENTS**

Result: Takes you to Submissions tracking page

VENUE HIRE AGREEMENT (TEST) SIGN YOURSELF SEND SAVE

VENUE HIRE AGREEMENT

1. PARTIES

Venue Name: Speakerbox Limited Partnership (Head Office)
(TH Tax ID: #0103566003106)

Venue Address: 1000/39 Soi Sukhumvit 59, Khlong Tan Nuea, Watthana, Bangkok, 10110

Representative: Edward Mellor

Promoter Name: _____

Promoter Address: _____

Representative: _____

Together referred to as "the Parties".

2. EVENT DETAILS

Event Date: _____

Event Start Time: _____

Curfew: _____

First Party +

Tr Promoter Name

Tr Company Tax ID

Tr Promoter Address

Tr Contact Name

Event Date

Tr Event Start Time

Tr Curfew

Tr Venue Hire Fee

Venue Signature

Date of Venue Signing

Text Signature Initials

Date Number Image

Checkbox Multiple File

Radio Select Cells

ADD DOCUMENT

Add Recipients ×

via Email via Phone Detailed Upload List

First Party Second Party

aaron@speakerboxlive.com Email

Preserve order ⓘ

Send Email [Edit message](#)

ADD RECIPIENTS

STEP 5: Complete Venue Signature

On Submissions page:

1. Click **SIGN NOW** button

Multi-page form appears - fill in ALL fields:

Page 1 - Parties Information:

- Promoter Name
- Promoter Address
- Promoter Tax ID (Company Registration Number)
- Promoter Contact Name

Page 2 - Event Details:

- Event Date
- Event Start Time
- Curfew (hard stop time)

Page 3 - Financial Terms:

- Venue Hire Fee (total amount in THB)

Page 4 - Venue Signature:

- Venue Signature (draw, type, or upload)
- Date of Venue Signing

Navigation: Click **NEXT** button at bottom to move between pages

2. After completing all fields, click **SUBMIT**

Result: Returns to Submissions tracking page

The screenshot shows the DocuSeal interface for a document titled "VENUE HIRE AGREEMENT (TEST)". At the top left is the DocuSeal logo. A notification banner says "New recipients have been added." with a close button. On the right are "Settings" and a user profile icon "AW". Below the title are several action buttons: a filter icon, "LINK", "ARCHIVE", "CLONE", and "EDIT". A "Submissions" section shows a list of recipients: "SENT aaron@speakerboxlive.com" and "AWAITING kop@speakerboxlive.com". To the right of this list are buttons for "EXPORT", "ADD RECIPIENTS", "SIGN NOW", "VIEW", and "COPY LINK".

The screenshot shows the document preview for "VENUE HIRE AGREEMENT (TEST)". At the top left is the DocuSeal logo. On the right are "DECLINE" and "DOWNLOAD" buttons. The document content includes the Speakerbox logo and contact information: "Speakerbox Limited Partnership, 1000/39 Soi Sukhumvit 55 (Thong Lo), Khlong Tan Nuea, Watthana, Krung Thep Maha Nakhon, 10110, e: events@speakerboxlive.com". Below this is the title "VENUE HIRE AGREEMENT" and the section "1. PARTIES". A form field for "Promoter Name" is shown with a text input area containing "Type here..." and a "NEXT" button below it. At the bottom of the form are several small circular indicators.

STEP 6: Contract Automatically Sent to Promoter

Submissions page now shows:

- **SENT** [your email] (venue signed)
- **AWAITING** [promoter email] (waiting for signature)

Automatic actions:

- Promoter receives email with signing link
- Email sent because "Preserve order" was ticked
- Reminder emails sent automatically (check if DocuSeal Pro needed for custom intervals)

Venue-side process complete - now waiting for promoter

STEP 7: Promoter Signs Contract

What the promoter sees:

1. Receives email from DocuSeal with subject: "Venue Hire Agreement requires your signature"
2. Clicks link in email
3. Sees Speakerbox-branded signing page
4. Reviews pre-filled information (venue already filled this in)
5. Adds their signature and date
6. Clicks **SUBMIT**

STEP 8: Contract Completion Notification

When promoter signs, automatic actions occur:

Notifications:

- Email sent to venue signer (person who created the contract)
- Email sent to promoter
- Both emails contain signed PDF attachment

System storage:

- Contract saved in DocuSeal system
- Accessible via Submissions page

Submission status updates:

- **SENT** ☐ [venue email]
- **SENT** ☐ [promoter email]
- All parties signed = **COMPLETED**

STEP 9: File Completed Contract (MANUAL)

Action required - venue staff:

1. Download signed contract PDF from DocuSeal
 - Via email attachment, OR
 - Click **VIEW** on Submissions page → Download PDF
2. Save to Google Drive in correct location:

Google Drive > SB3 > Bookings > [Promoter Name Folder]

3. Update NoCoDB:
 - Event record → Mark contract as "Signed"
 - Add link to Google Drive location
 - Update status to "Confirmed"

Process complete ☐

CHASING UNSIGNED CONTRACTS

If promoter hasn't signed within 3 days:

Option 1: Send reminder via WhatsApp/LINE

1. Go to Submissions page
2. Find the pending contract
3. Click **COPY LINK** button
4. Send link via WhatsApp/LINE with message:

Hi [Promoter Name],

Just following up on the venue hire agreement for [Event Date].

You can sign it here: [paste link]

Let me know if you have any questions!

Option 2: Resend email

- Click **SEND** button on Submissions page
- Triggers new email notification

Option 3: Check if automatic reminders working

- DocuSeal may send automatic reminders
- Confirm if Pro version needed for custom reminder schedules

MONITORING & TRACKING

Where to check contract status:

Submissions Page (main tracking location):

- **SENT** = Signed and completed
- **AWAITING** = Waiting for signature
- **VIEWED** = Promoter opened link but didn't sign yet

Actions available:

- **SIGN NOW** - Complete your signature (if you're pending signer)
- **COPY LINK** - Get direct URL to share via messaging apps
- **VIEW** - Preview/download contract
- **DELETE** - Remove submission (use with caution)
- **EXPORT** - Download signed PDF

DECISION TREE

ScenarioAction

Standard venue hire booking

Use existing template, clone and send

Custom terms needed

Edit cloned template fields before signing

Urgent - need signature today

Send DocuSeal link + WhatsApp follow-up

Promoter says link doesn't work

Click COPY LINK, send fresh URL via WhatsApp

Wrong promoter email entered

Delete submission, start over with correct email

Need to change contract after sending

Cannot edit - must delete and create new

Promoter can't find email

Check spam folder OR use COPY LINK → WhatsApp

Contract taking >3 days to sign

Send WhatsApp reminder with COPY LINK

INTEGRATION WITH BOOKING WORKFLOW

Current NoCoDB Process:

Booking Confirmation Flow:

1. Eddie confirms booking → Creates hold in NoCoDB
2. **[TRIGGER]** Hold → Confirmed status change
3. **[NEW STEP]** Kop/Aaron sends DocuSeal contract within 24 hours
4. Promoter receives email, signs contract
5. **[ACTION REQUIRED]** Save completed contract to Google Drive
6. **[ACTION REQUIRED]** Update NoCoDB event record with contract status

Future EventFlow Integration:

When EventFlow is production-ready:

- **Cue Created:** "Send Venue Hire Agreement"
- **Assigned to:** Kop/Aaron
- **Triggered by:** Event status change to "Confirmed"
- **Deadline:** 24 hours after confirmation
- **Auto-updates:** When contract signed, cue marked complete
- **Next cue triggers:** "Collect Event Details" (production/bar requirements)

FOLDER ORGANIZATION IN DOCUSEAL

Recommended Structure:

Default folder: Quick/urgent contracts

Monthly folders:

- "2025-01 Contracts"
- "2025-02 Contracts"
- etc.

Event type folders:

- "Venue Hire Agreements"
- "Artist Agreements" (future)
- "Sponsorship Agreements" (future)

To create folders:

1. Settings → Folders → Create New
2. Move completed contracts via "Change Folder" option

GOOGLE DRIVE FILING STRUCTURE

Required path:

Google Drive

└─ SB3

└─ Bookings

└─ [Promoter Name]

└─ VENUE_HIRE_AGREEMENT_[Date].pdf

Example:

Google Drive

└─ SB3

└─ Bookings

└─ SROAST ENTERTAINMENT

└─ VENUE_HIRE_AGREEMENT_2025-01-25.pdf

If promoter folder doesn't exist:

1. Create new folder with exact promoter name
2. Save contract inside
3. Add event runsheet, riders, etc. to same folder later

ACCESS & PERMISSIONS

Who can send contracts:

- Aaron (admin access)
- Kop (admin access)
- Eddie (to be configured - send only)

Promoter access:

- No login required
- Receives unique signing link via email
- Link valid for 30 days (default)
- Can sign from any device (mobile-friendly)

Security:

- Each contract link is unique and expires
- Cannot edit after sending
- Audit trail of all signatures and timestamps
- IP addresses logged for each signature

COMMON ISSUES & SOLUTIONS

ProblemSolution

"I forgot to add promoter email"

Delete submission, start over - cannot add recipients after initiating signing

"Promoter says link expired"

Generate new contract, send fresh link

"I made a mistake in the contract details"

Cannot edit after sending - delete and recreate

"Promoter signed but I didn't get notification"

Check spam folder, or go to Submissions page to verify status

"Contract stuck at AWAITING for 1 week"

Contact promoter via WhatsApp with COPY LINK

"Need to cancel contract"

Click DELETE on Submissions page (use caution - irreversible)

"Promoter needs to sign offline"

Not possible with DocuSeal - use paper contract if required

EMAIL TEMPLATE (OPTIONAL CUSTOMIZATION)

Default email sent to promoter:

Subject: Venue Hire Agreement requires your signature

Dear [Promoter Name],

Please review and sign the venue hire agreement for your event at Speakerbox.

Click here to sign: [Link]

This document has been prepared by [Your Name] from Speakerbox.

Best regards,
Speakerbox Team

To customize:

- Click "Edit message" in Add Recipients dialog
- Add event-specific details
- Include event date/time
- Add contact information for questions

CHECKLIST: Before Sending Contract

- Verified promoter email address is correct
- Event date, time, and curfew are accurate
- Venue hire fee amount is correct
- Promoter name and company details are accurate

- "Preserve order" is ticked (venue signs first)
- "Send Email" is ticked (auto-send to promoter)

POST-SIGNING CHECKLIST

- Signed contract downloaded from DocuSeal
- Contract saved to Google Drive > SB3 > Bookings > [Promoter Folder]
- NoCoDB event record updated with contract status
- Event status changed to "Confirmed"
- Next steps triggered (production/bar requirements collection)

NOTES & REMINDERS

Important:

- Pre-fill link is based on **active user login** - whoever sends the contract is listed as "First Party"
- Cannot edit contract fields after clicking "Add Recipients"
- Automatic reminder functionality may require DocuSeal Pro (verify with current subscription)
- Keep contracts organized by moving to appropriate folders monthly

Future improvements:

- Integration with EventFlow for automated workflow
- Automatic NoCoDB updates when contract signed
- Webhook triggers for contract completion notifications
- Template variations for different event types (premium tier, multi-day, etc.)

RELATED PROCESSES

See also:

- SOP: Event Data Request (production/bar requirements from promoter)
- SOP: NoCoDB Event Management
- SOP: Google Drive File Organization
- SOP: EventFlow Workflow (when production-ready)

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