

# 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 displays 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 'Document Templates' section with a grid icon and a list icon. To the right of this are 'UPLOAD' and 'CREATE' buttons. The main area shows 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](mailto:aaron@speakerboxlive.com) or [kop@speakerboxlive.com](mailto: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:** [Text Field]

**Promoter Address:** [Text Field]

**Representative:** [Text Field]

Together referred to as "the Parties".

**2. EVENT DETAILS**

**Event Date:** [Date Picker]

**Event Start Time:** [Time Picker]

**Curfew:** [Time Picker]

**VENUE HIRE AGREEMENT - \_\_HIRER NAME\_\_**

ADD DOCUMENT

**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

**Signature** Venue Signature

**Date of Venue Signing**

**Text** **Signature** **Initials**

**Date** **Number** **Image**

**Checkbox** **Multiple** **File**

**Radio** **Select** **Cells**

## 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. At the top left is the DocuSeal logo. A notification banner says "New recipients have been added." with a close button. On the right is a "Settings" button with a user icon "AW". The main title is "VENUE HIRE AGREEMENT (TEST)" with a "Default" dropdown. Below the title are buttons for "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 the 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". The main title is "VENUE HIRE AGREEMENT" followed by "1. PARTIES". Below this is a form with a "Promoter Name" label and a text input field containing "Type here...". A "NEXT" button is at the bottom of the form. A progress indicator at the very bottom shows a series of dots, with the first one filled.

## **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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