DocuSign Integration
Momentus Elite

STREAMLINE YOUR WORKFLOWS WITH DOCUSIGN E-SIGNATURES

Momentus Elite's DocuSign integration streamlines the process of getting client signatures on important documents such as proposals, contracts, event orders, and invoices. Documents generated in Elite can be sent to DocuSign to distribute to the client for e-signature. Signed documents are returned to Momentus Elite to complete the workflow.

Maximize revenue and create memorable experiences.

Streamline the process of generating, distributing, and executing key documents using e-signatures.

Reduce manual data entry and save time leveraging Momentus Elite's document template generation.

Seamlessly send documents to DocuSign where documents can be marked for e-signature and distributed to the appropriate signees.

Keep teams up to date with signed documents returning to Momentus Elite and updating event status where applicable.

Proposals and Contracting

Proposals and contracts are created in Momentus Elite as document templates. Once created, these documents can be sent to DocuSign where signature or initial lines are designated. Additional documents can be attached to create a proposal or contract packet. The entire packet can then be sent to the customer for e-signature. Once signed, the packet will be returned to Momentus Elite and the Contract Status of the event will be marked as "Contract Signed."

Invoicing

Some organizations require signature on Invoices. Invoices created in Momentus Elite can be sent to DocuSign where signature or initial lines are designated for the client to sign off. The Invoice can then be processed and signed, which will then return to Momentus Elite.

The Momentus Solution

Challenge:
Obtaining signatures on key documents can be tedious and time-consuming, with signatories often printing, hand-signing and re-scanning documents once signed.

Solution:
Integrating DocuSign with Momentus Elite reduces the need to print, sign, and scan documents. Clients can review and sign documents electronically within a matter of seconds.

Challenge:
Signed documents are often returned via email (or even fax), creating additional friction points or manual steps to ensure they are attached to their respective events.

Solution:
Using the Momentus Elite DocuSign integration, documents signed via DocuSign are automatically returned to the respective events in Momentus Elite. Where applicable, event Contract Statuses can be updated automatically to trigger subsequent steps in the workflow.

Contact Us

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