SIGNETEC

Preparing and sending documents

A short guide for Administrators, Managers and Agents:
templates, merge tags and where their values come from, and generating documents on the fly.

Version 1.4 · 30 October 2026
All screenshots use a made-up demo agency (“Blue Crane Realty”) and made-up people. No real client data is shown.

Contents

1 How it fits together

2 Preliminary preparation (Admin / Manager)

- 2.1 Create a template
- 2.2 Import a template from Google Docs
- 2.3 Set up the fields
- 2.4 Content zones
- 2.5 Logo and legal notice
- 2.6 Look after your templates

3 Merge tags: where values come from

- 3.1 The sources at a glance
- 3.2 Agent profile and profile fields
- 3.3 Google Sheets: organisation data
- 3.4 Google Sheets: client lookup
- 3.5 Typed on the Generate screen
- 3.6 Filled by the signatory
- 3.7 Troubleshooting

4 On-the-fly preparation (Agent)

5 Sending and signing

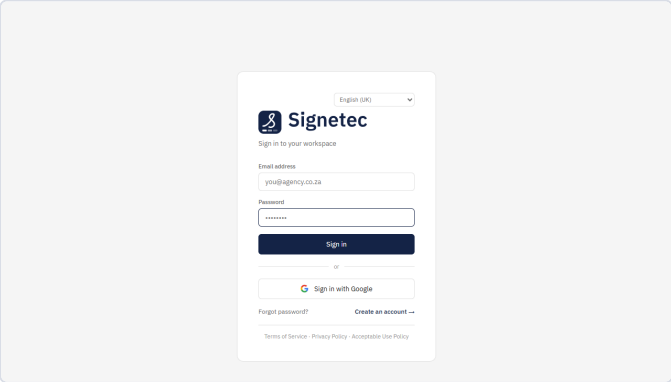
6 Where your documents are kept (Admin)

- 6.1 What Signetec keeps, and for how long
- 6.2 Save signed documents in your Google Drive
- 6.3 Templates linked to Google Docs
- 6.4 Before you cancel or close an account

7 Quick reference

Before you start

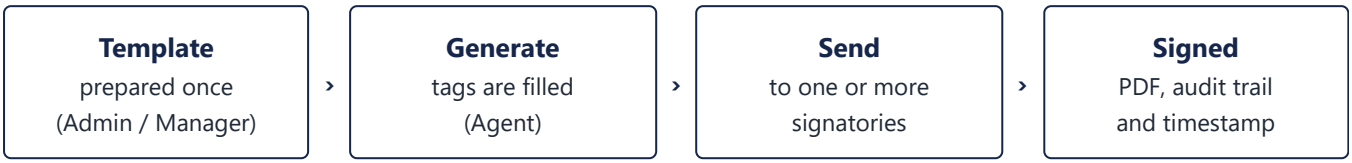
- Sign in at **app.signetec.com**. What you see depends on your role: **Admin** (Organisation Admin), **Manager** or **Agent**.
- **Do not use Signetec** for documents that need a notarial deed, a wet-ink signature, or that the law of your region excludes from electronic signature (in South Africa, for example, agreements covered by the Alienation of Land Act). The Generate screen shows this reminder every time.
- **On a phone or tablet** the menu is behind the ☰ button at the top left. Tap a section to go there and the menu closes. Signing works the same way on any phone.



The sign-in page.

1 How it fits together

Every document starts as a **template**: a master document with **merge tags** such as `{{tenant_full_name}}` where the details go. Templates are prepared once. Each time someone needs a document they **generate** a fresh copy from the template, the tags are filled in, and the copy is sent for signing. The template is never changed.



Who does what

Role	What they do in this guide
Admin	Everything a Manager does, plus **Settings**: logo, legal notice, profile fields, Google Sheets data sources and mappings. Manages users.
Manager	Creates and imports templates, sets up their fields, syncs Google Docs templates.
Agent	Keeps their own profile up to date, generates documents from templates, sends them for signing.

The three kinds of field

Every merge tag in a template is set up as one of three kinds. The colours are used throughout the app.

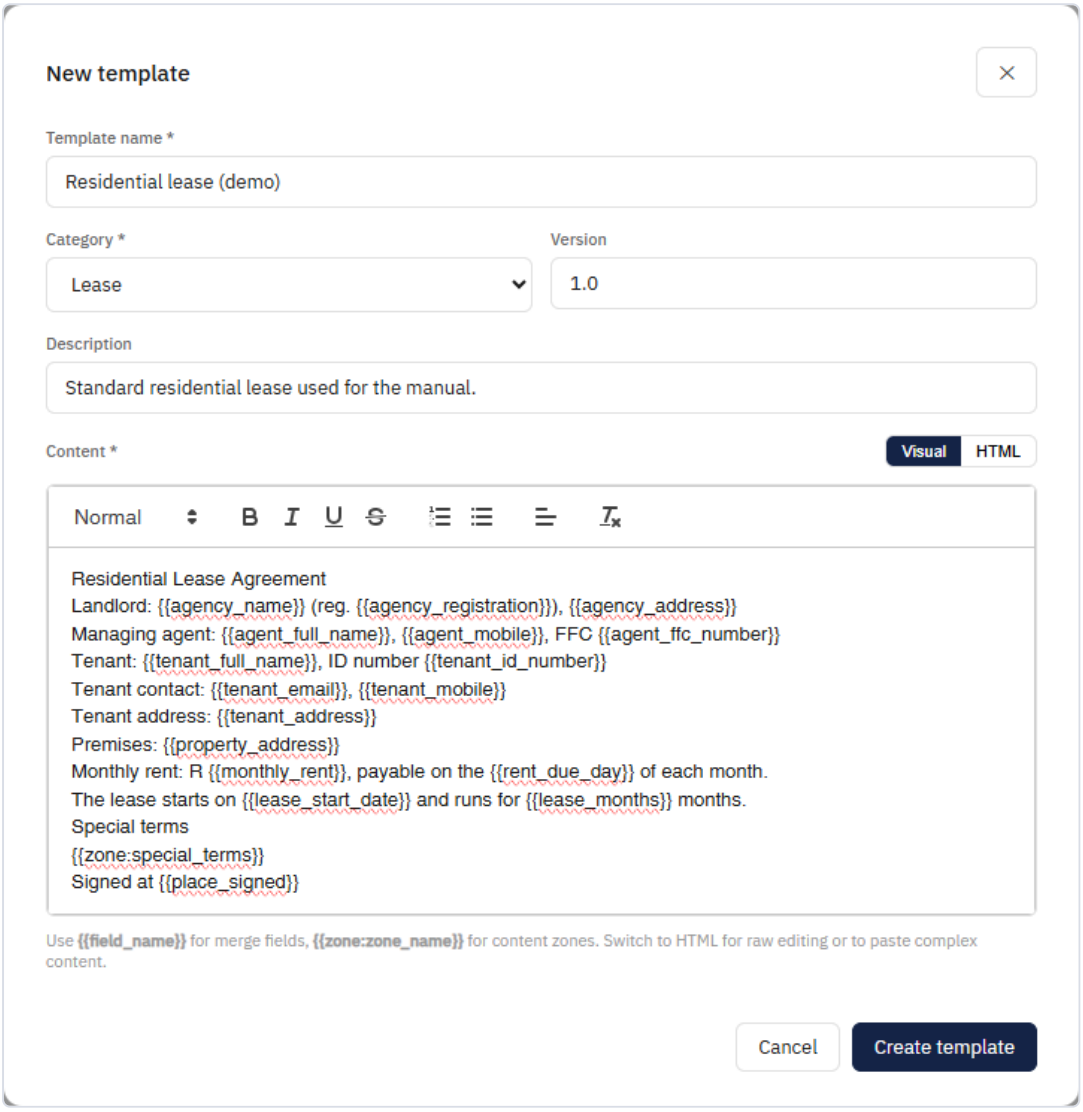
Kind	Who supplies the value	Typical examples
System	Signetec, automatically, when the document is generated (from the agent's profile and your connected Google Sheets).	Agency name, agent name and mobile, FFC number
Agent	The person generating the document, on the Generate screen. Can be pre-filled from a client sheet.	Tenant name, property address, rent, dates
Signatory	The signatory, on the signing page, just before they sign.	ID number, place of signing

2 Preliminary preparation (Admin / Manager)

Do this once per template, before agents need it. There are two ways to get a template into Signetec: type it in the built-in editor (2.1), or write it in a Google Doc and import it (2.2).

2.1 Create a template

1. Open **Templates** and click **+ New template**.
2. Give it a **name**, **category** and **description**.
3. Write the document in the **Visual** editor (or switch to **HTML** to paste ready-made content). Wherever a detail will change from document to document, type a merge tag in double curly brackets.
4. Click **Create template**. Signetec finds every tag in the text and lists them as the template's merge fields.

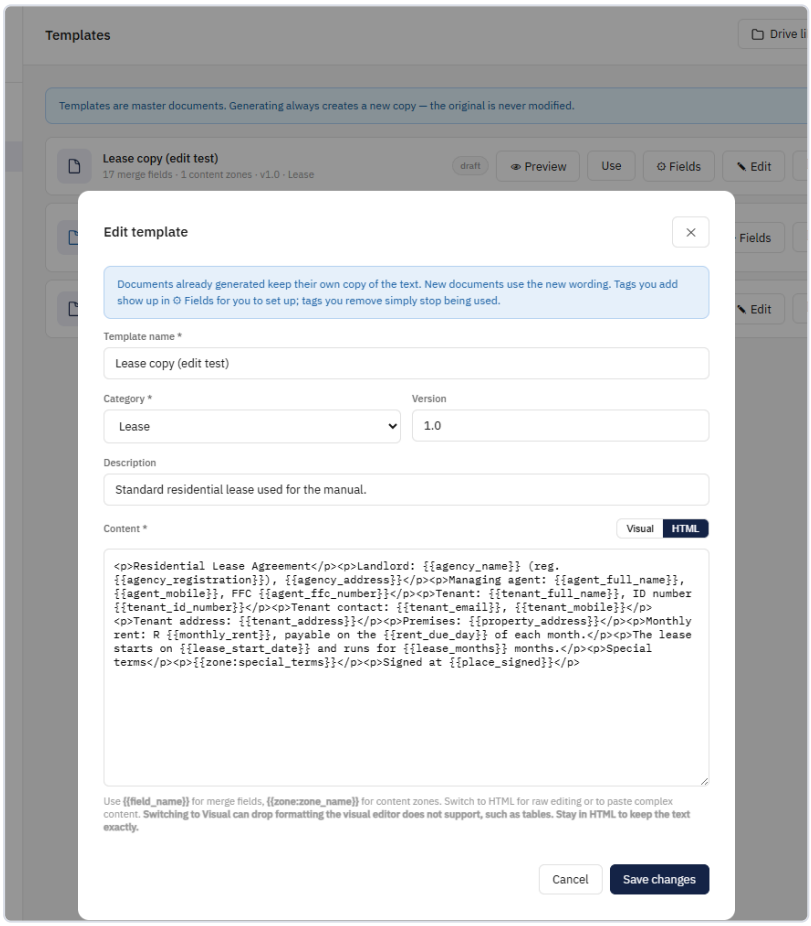


The New template window with merge tags typed into the text.

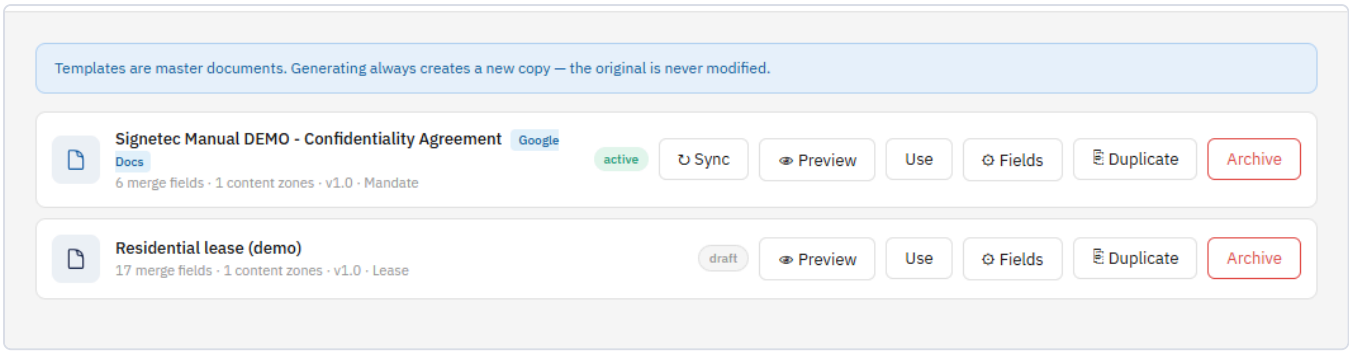
You type	It means
`{{tenant_full_name}}`	A **merge field**: one short value. Use lowercase letters, numbers and underscores. Capitals and spaces are tidied up for you (`{{Tenant Full Name}}` becomes `{{tenant_full_name}}`).
`{{zone:special_terms}}`	A **content zone**: a block of free text (clauses, a property description). See 2.4.

Tip. Use the same tag name wherever the same detail appears, in every template. That is what lets one agent profile and one client sheet fill many different templates.

Changing a template later. Click ✎ **Edit** on the template (templates made in Signetec only; a Google Doc template is edited in the Doc and re-synced, see 2.2). The text opens exactly as stored, in the HTML view. Save, and Signetec finds the tags in the new text, keeps how your existing fields are set up, starts any new field with the default set-up (for you to adjust in ⚙ Fields) and raises the version number. Documents already generated keep their own copy of the old wording. **Switching to the Visual editor can drop formatting it does not support, such as tables**, so stay in HTML to keep the text exactly.



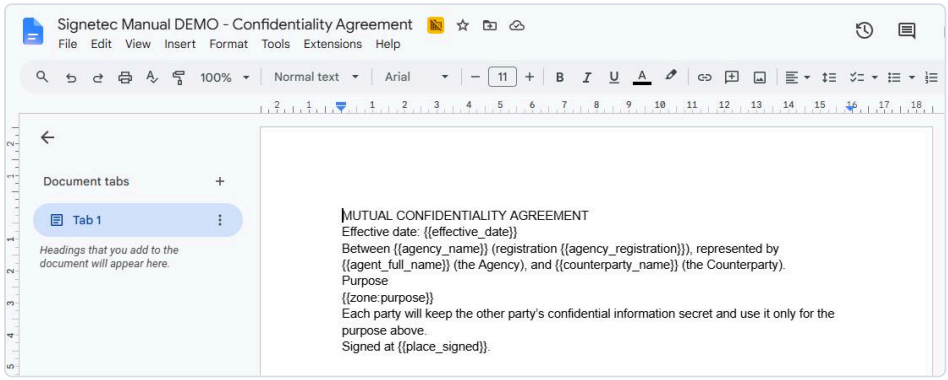
Editing a template: the text opens as stored, with a warning about the Visual view.



The Templates list. Each row shows how many merge fields and content zones the template has.

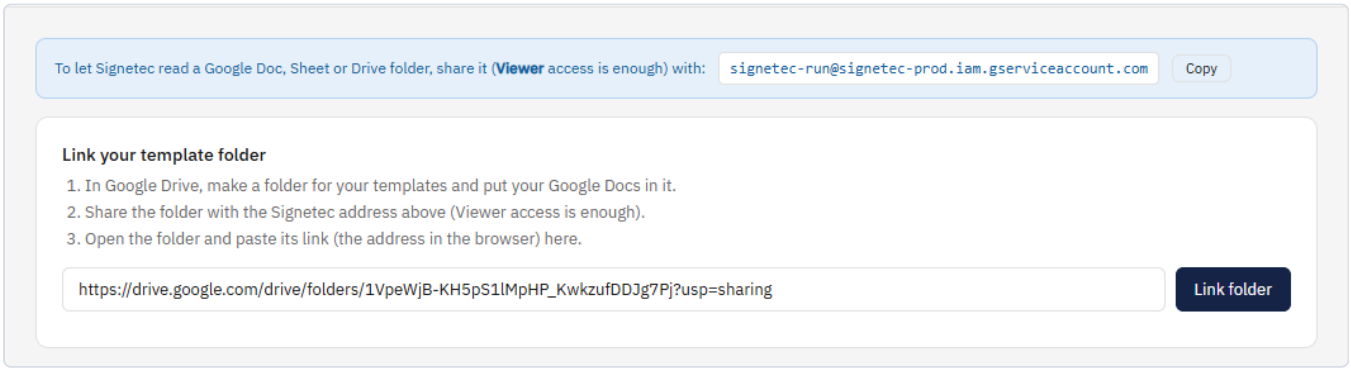
2.2 Import a template from Google Docs

If your wording lives in Google Docs, write it there and use the same tags. Signetec reads the Doc, keeps its formatting, and re-reads it whenever you ask.

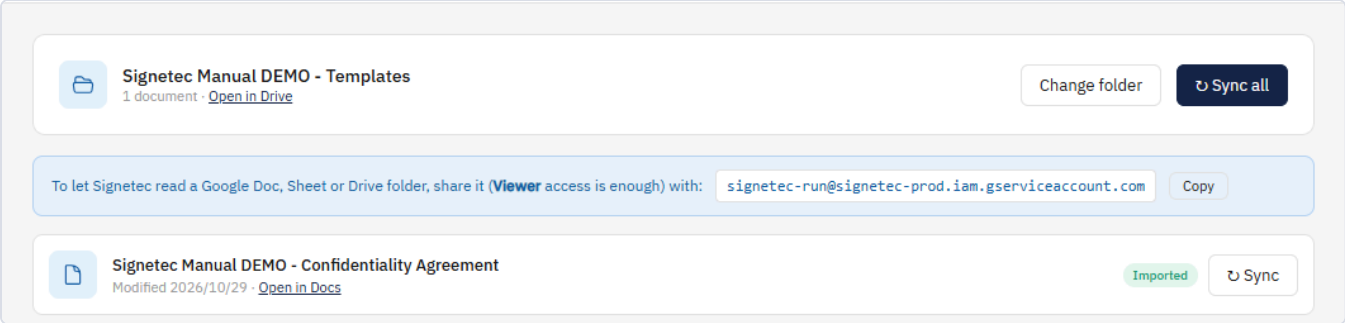


A Google Doc template. The tags are typed as normal text.

1. Put the Doc in a templates folder in your Google Drive, and share that folder with Signetec's Google address (Viewer access).
2. In Signetec open **Templates** and click **Drive library**. The first time, paste the folder's link (the address in your browser when the folder is open) and click **Link folder** (an administrator does this once). The library then lists every Doc in the folder. **Change folder** links a different one.
3. Click ⬇ **Import** next to the Doc. It now appears in your Templates list with a **Google Docs** label.
4. Later, after editing the Doc, click ↻ **Sync** (on the template, or in the Drive library). Signetec re-reads the Doc, raises the version number (for example 1.0 to 1.1), and detects any new tags. **Sync all** does this for every Doc in the folder.



The first time, the Drive library asks for your folder's link. Share the folder with the address in the blue box, paste the link and click **Link folder**.



Once the folder is linked, the library lists its Docs. "Imported" Docs can be re-synced at any time, and **Change folder** links a different folder.

> **Note.** The **Drive library** button only appears where Google integration is switched on for your account. If you do not see it, ask Signetec support. The Drive library page shows the Signetec service account's address with a **Copy** button: share your templates folder with it (Viewer access) or Signetec cannot read your Docs. Only an Admin can link or change the folder; Managers can import and sync from it. Each organisation has its own folder, which nobody else can see.

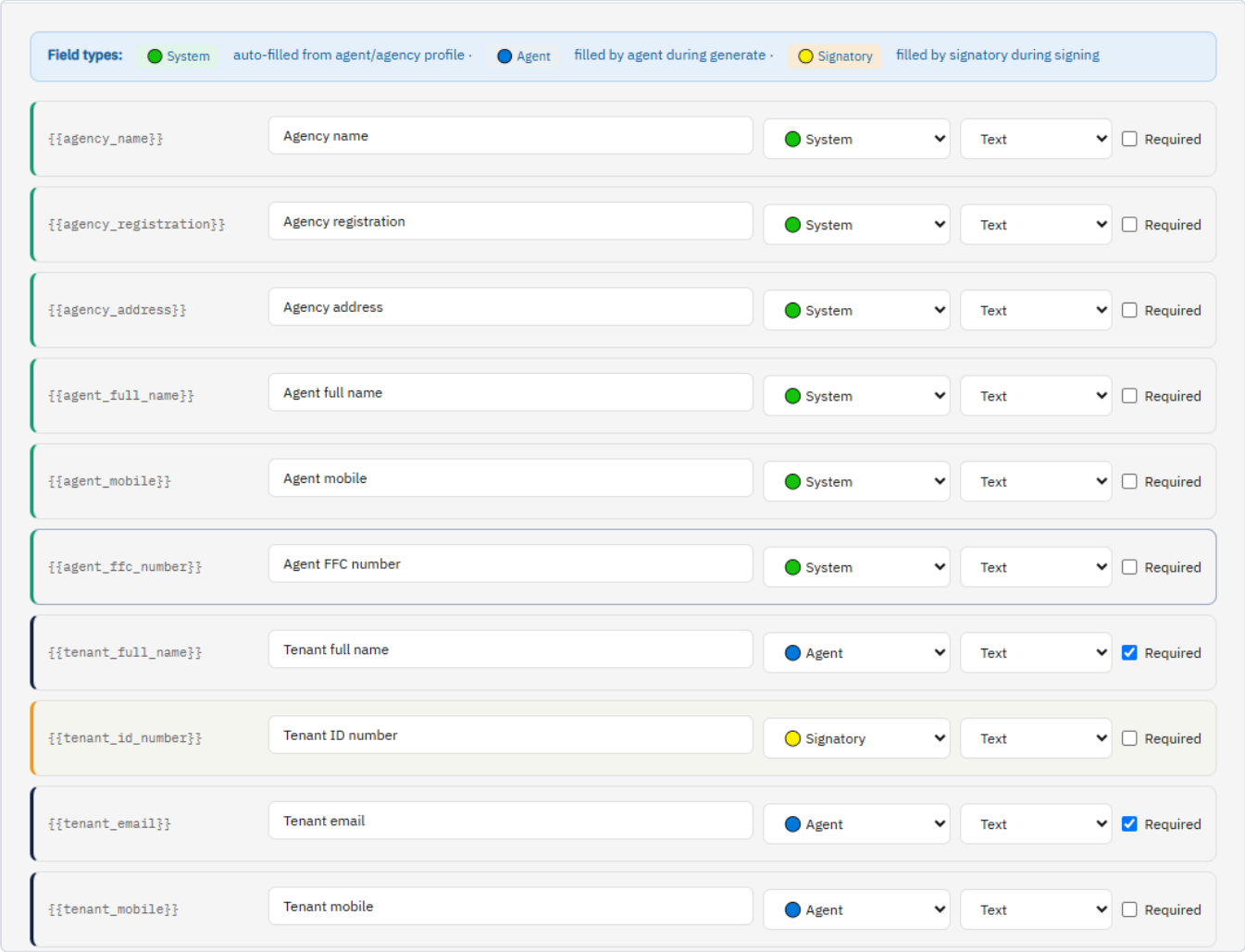
> **Linked, not copied.** Signetec does not keep the text of a Google Doc template. It reads the Doc from Google each time it is needed (generating a document, previewing) and keeps it in memory for a few minutes at most. Edit the Doc and the next document uses the new wording straight away. The Doc must stay shared with Signetec, or generating from it fails (6.3).

> **Note.** Tags that are new after a sync start out as ● Agent / Text fields. Fields you already set up keep their setup.

2.3 Set up the fields

After a template is created or imported, open its ⚙ **Fields** page. This is where you decide, tag by tag, who fills it in and how it looks on the Generate screen.

1. Click ⚙ **Fields** on the template.
2. For each tag choose the **kind**: ● System, ● Agent or ● Signatory.
3. Choose how it is entered: **Text, Number, Currency (R), Date, Dropdown, Radio buttons, Checkbox** or **Text area**. For Dropdown, Radio and Checkbox, type the options separated by commas.
4. Tick **Required** for anything the agent must not skip, and give each field a friendly **label**.
5. Click **Save field definitions**.



The field editor for the lease template: agency and agent details are System, the tenant's ID number is Signatory, everything else is Agent.

> **Required and optional fields.** A field marked **Required** must have a value before a document can be generated: the Generate form shows a red asterisk and refuses to continue, and Signetec checks again on its side. An **optional** field left empty comes out **blank** in the document, and before generating Signetec lists those fields so you can go back and fill them. Signatory fields and the signature, date and place are completed at signing and are never blank.

2.4 Content zones

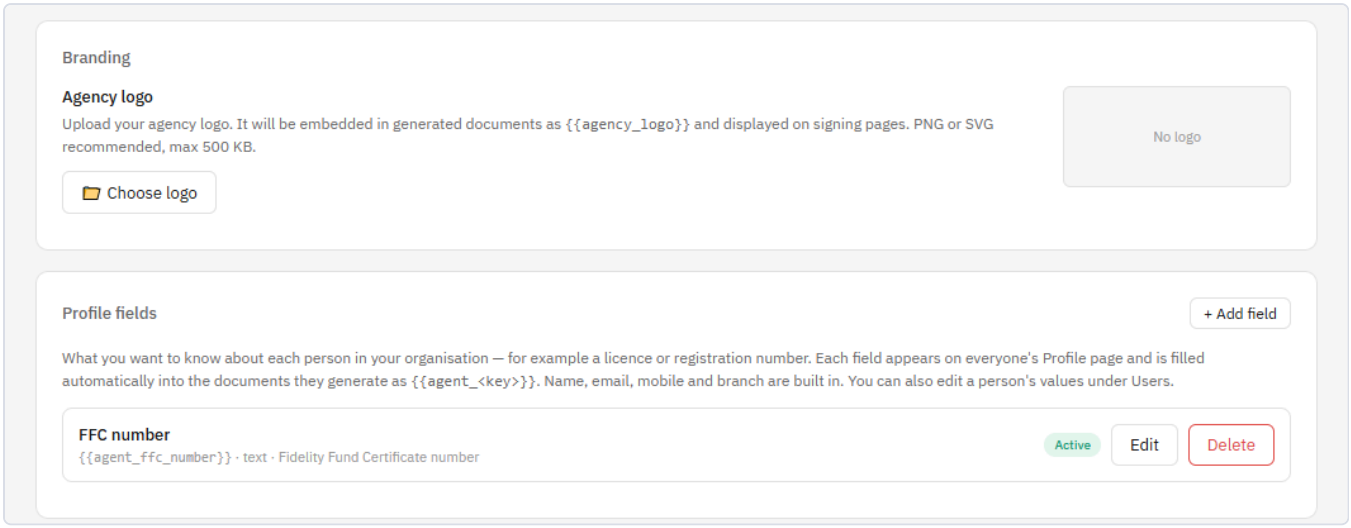
A `{{zone:name}}` tag becomes a larger text box on the Generate screen. Agents can type, or paste text from elsewhere. Simple formatting is accepted: a line starting with `-` becomes a bullet. Zones can carry default wording that the agent may edit.

2.5 Logo and legal notice (Admin)

In **Settings**:

- **Agency logo.** Upload a PNG or SVG (up to 500 KB). Put `{{agency_logo}}` in a template to print it, and it also appears on signing pages.
- **Custom legal disclaimer.** Switch it on and write your own notice (for example a statutory exclusion that applies to your business). It then shows on the Generate screen and is printed on every document. Signetec

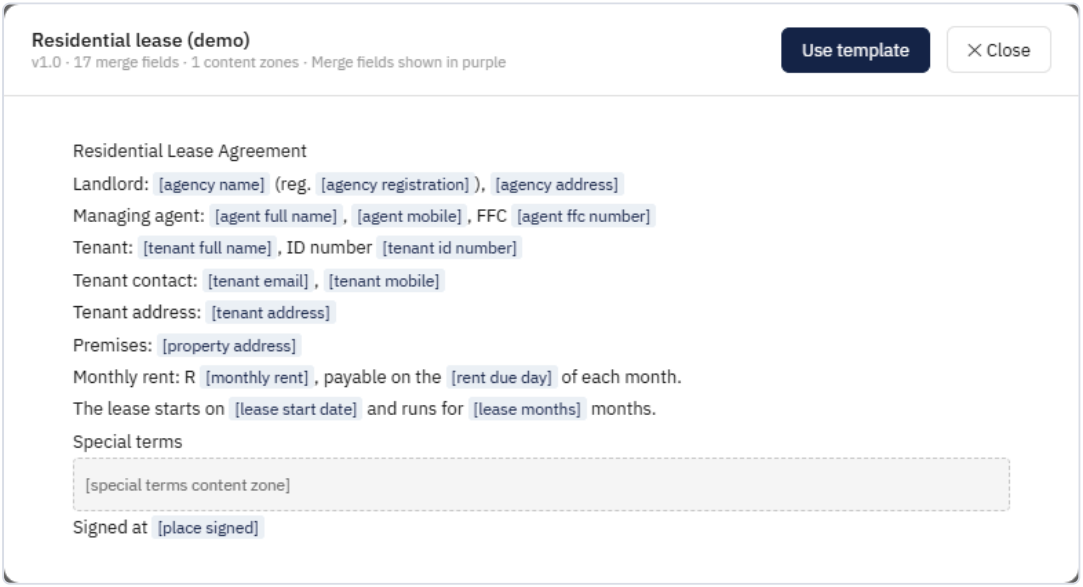
does not pre-fill any legal wording; ask your legal counsel.



Settings: branding, profile fields and the legal disclaimer (data sources are further down).

2.6 Look after your templates

Button	What it does
👁 **Preview**	Shows the template with its tags highlighted, so you can check the wording. **Use template** jumps straight to Generate.
Use	Opens Generate with this template selected.
✎ **Edit**	Changes the name, category, description or text of a template made in Signetec (see 2.1). Not available for Google Doc templates, which you edit in the Doc.
⎘ **Duplicate**	Makes a copy under a new name, including how each field is set up (useful for a variation).
Archive	Hides the template from use. An Admin can **Restore** it, or **Purge** it permanently.



Template preview: tags are shown as highlighted placeholders.

3 Merge tags: where values come from

When an agent generates a document, Signetec fills each tag from the first suitable source below. This chapter explains each source, who looks after it and where.

3.1 The sources at a glance

Source	Fills tags like	Looked after by	Where
Agent profile	`{{agent_full_name}}` `{{agent_email}}` `{{agent_mobile}}` `{{agent_branch}}`	Each person (branch: Admin)	Click your name, bottom left: **My profile**
Profile fields (your own extras)	`{{agent_ffc_number}}`, `{{agent_licence_number}}` …	Admin defines them; each person fills in their own	**Settings** → **Profile fields**; **My profile**; **Users**
Google Sheet: organisation data	`{{agency_name}}` `{{agency_address}}` and anything else that is the same for everyone	Admin	The Google Sheet itself; **Settings** → **Data sources**
Google Sheet: client lookup	`{{tenant_full_name}}` `{{tenant_email}}` … (one row per client)	Admin	The Google Sheet; connected in **Settings**; used on **Generate**
Agency logo	`{{agency_logo}}`	Admin	**Settings** → **Branding**
Typed on Generate	Any 🔵 Agent field, and content zones	The agent generating	**Generate**
Filled by the signatory	Any 🟡 Signatory field	The signatory	The signing page

> **If two sources offer the same tag,** the order of priority is: **1.** what the agent types on the Generate screen; **2.** the agent's profile; **3.** the organisation Google Sheet. A value typed on the Generate screen always wins; an empty box never overrides anything.

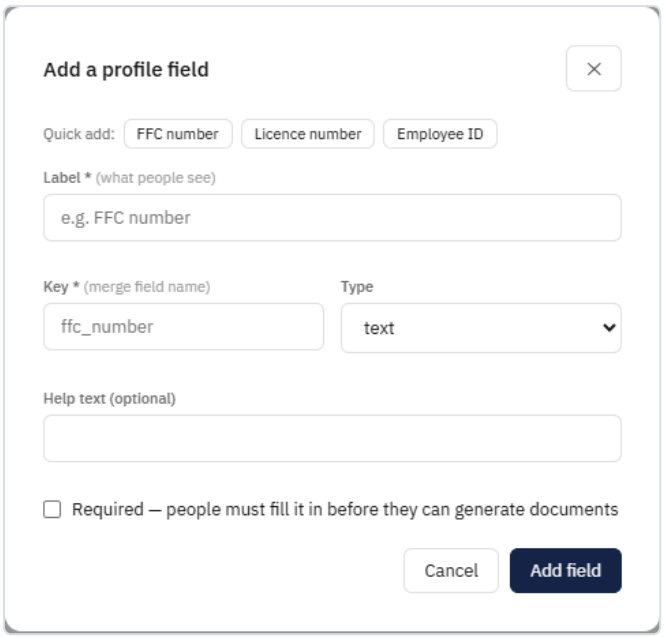
3.2 Agent profile and profile fields

Every person has a profile. Four values are built in: `{{agent_full_name}}`, `{{agent_email}}`, `{{agent_mobile}}` and `{{agent_branch}}` (the branch is set by an Admin). Whatever you put in a template is filled from the person generating the document, so each agent's documents carry their own details.

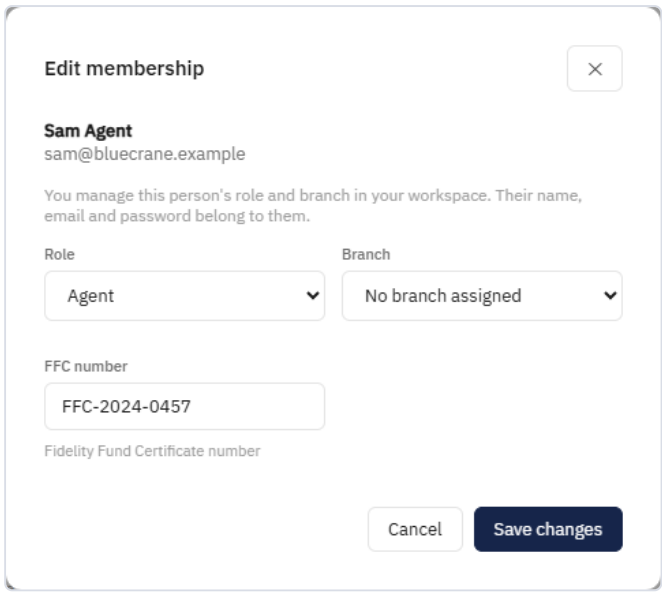
Extra details your organisation needs (a licence or FFC number, an employee ID) are **profile fields**:

1. **Admin:** open **Settings** → **Profile fields** → **+ Add field**. Give it a label and a key. The key becomes the tag: key `ffc_number` gives `{{agent_ffc_number}}`. Choose text, number, date or a dropdown. Tick **Required** if people must complete it before they can generate documents.
2. **Each person:** click your name (bottom left) to open **My profile** and fill in your values. The **Merge field reference** panel at the bottom lists every tag your profile fills and its current value.

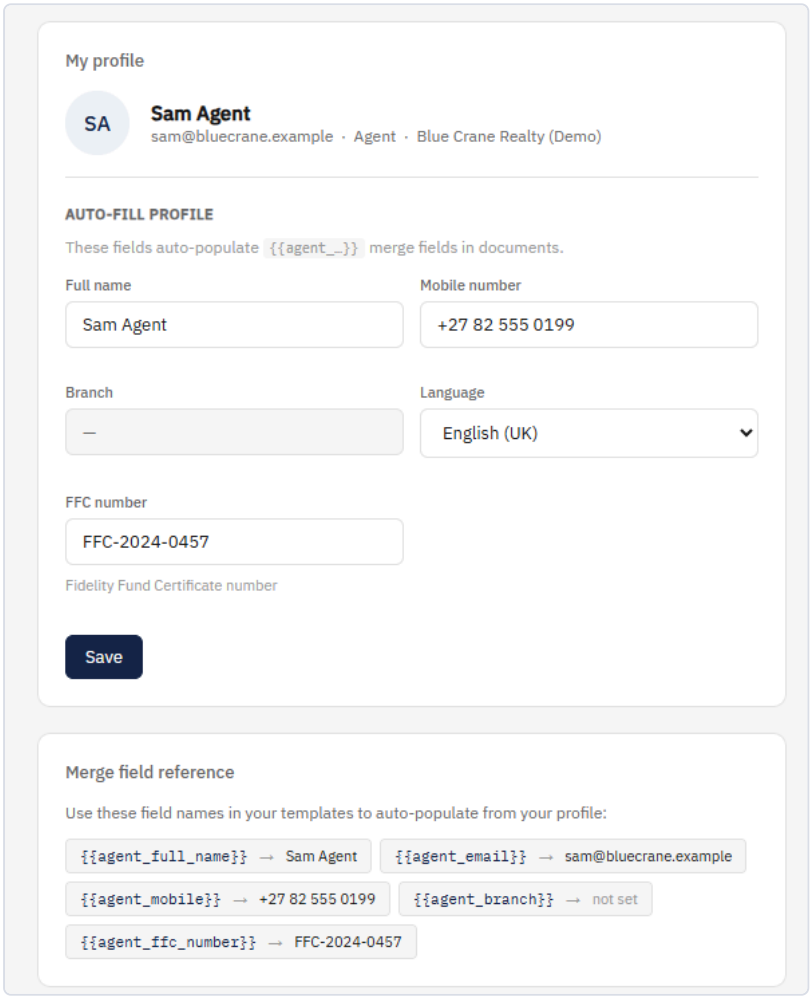
3 **Admin** can also fill in or correct a person's values under **Users**.



Admin: adding a profile field. "Quick add" offers common ones.



Admin: Users → Edit. Set a person's role and branch, and fill in their profile field values (here the FFC number).



An agent's My profile page. The Merge field reference at the bottom shows which tags it fills.

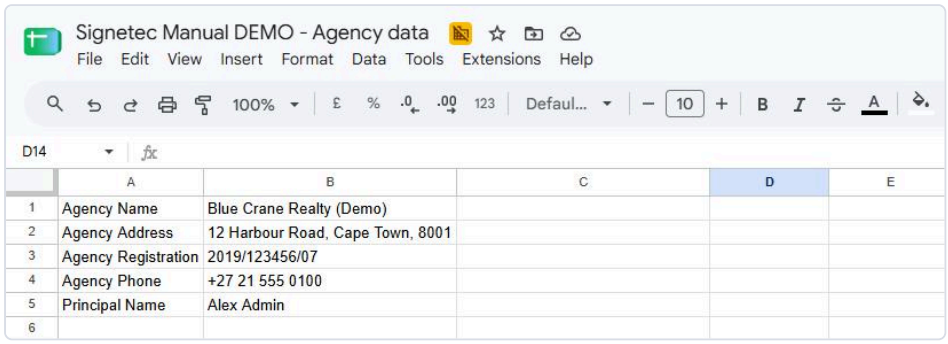
> **Tip.** If a required profile field is empty, generating is blocked with a message naming the missing field. Fill it in on My profile and try again.

3.3 Google Sheets: organisation data (Admin)

Details that are the same for every document your organisation produces (agency name, address, registration number, principal) are best kept in one Google Sheet that you maintain in one place. Change the sheet, and every new document uses the new value.

Prepare the sheet

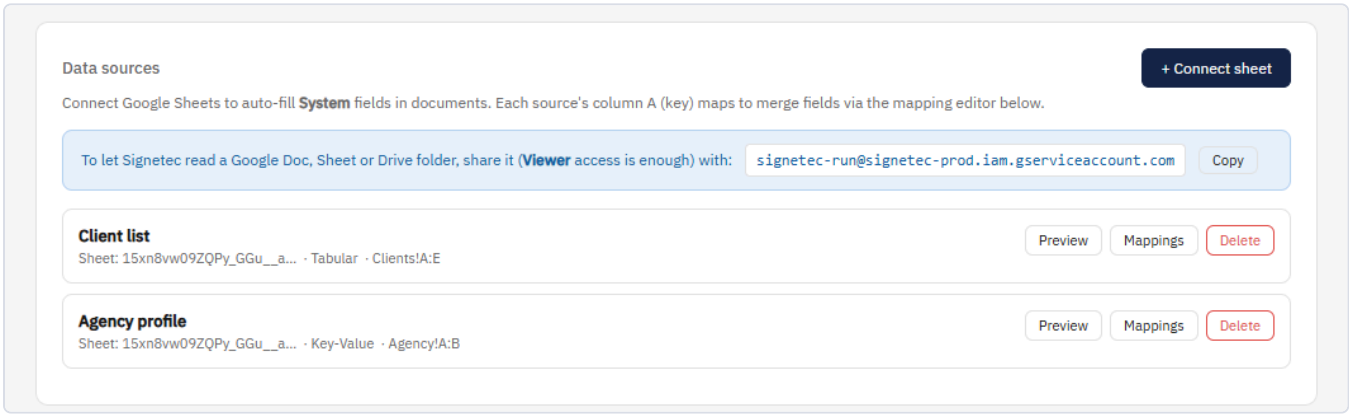
Use two columns: **column A is the name** of the detail, **column B is the value**. Names can be written naturally: "Agency Name" becomes the tag `{{agency_name}}` automatically (lowercase, spaces become underscores).



	A	B	C	D	E
1	Agency Name	Blue Crane Realty (Demo)			
2	Agency Address	12 Harbour Road, Cape Town, 8001			
3	Agency Registration	2019/123456/07			
4	Agency Phone	+27 21 555 0100			
5	Principal Name	Alex Admin			
6					

A "key-value" sheet: names in column A, values in column B.

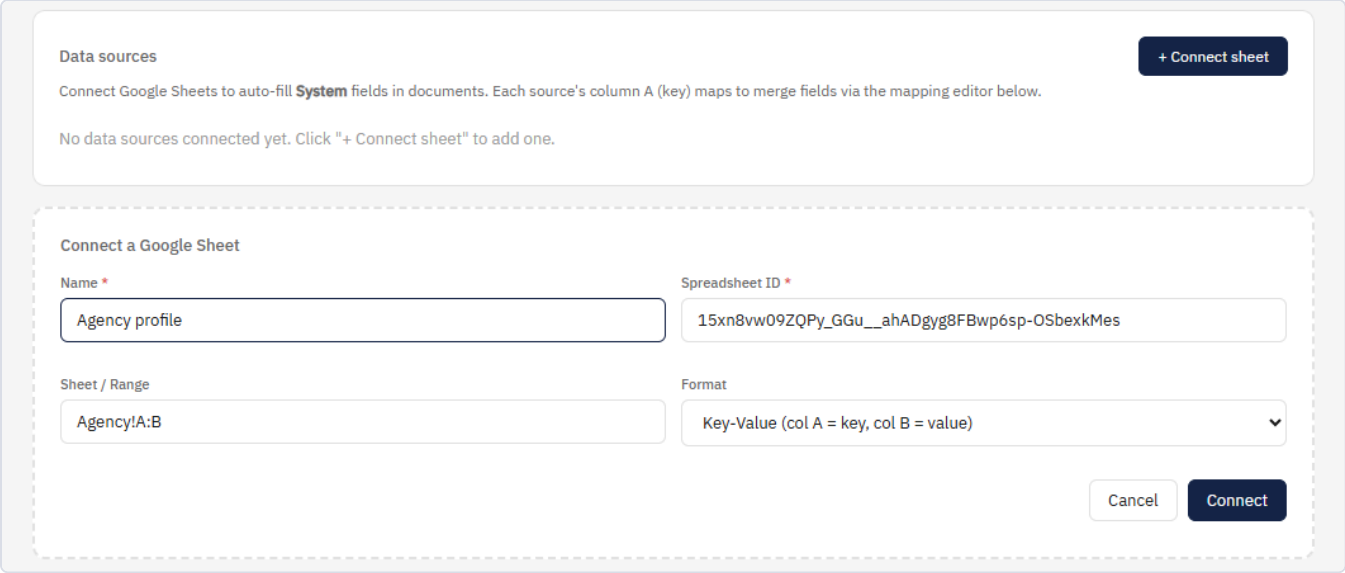
Share the sheet (Viewer access is enough) with Signetec's Google service account. Its address is shown for you in **Settings → Data sources**, with a **Copy** button. Without this, Signetec cannot read the sheet.



Settings → Data sources shows the address to share your Google Sheets and Docs with.

Connect it

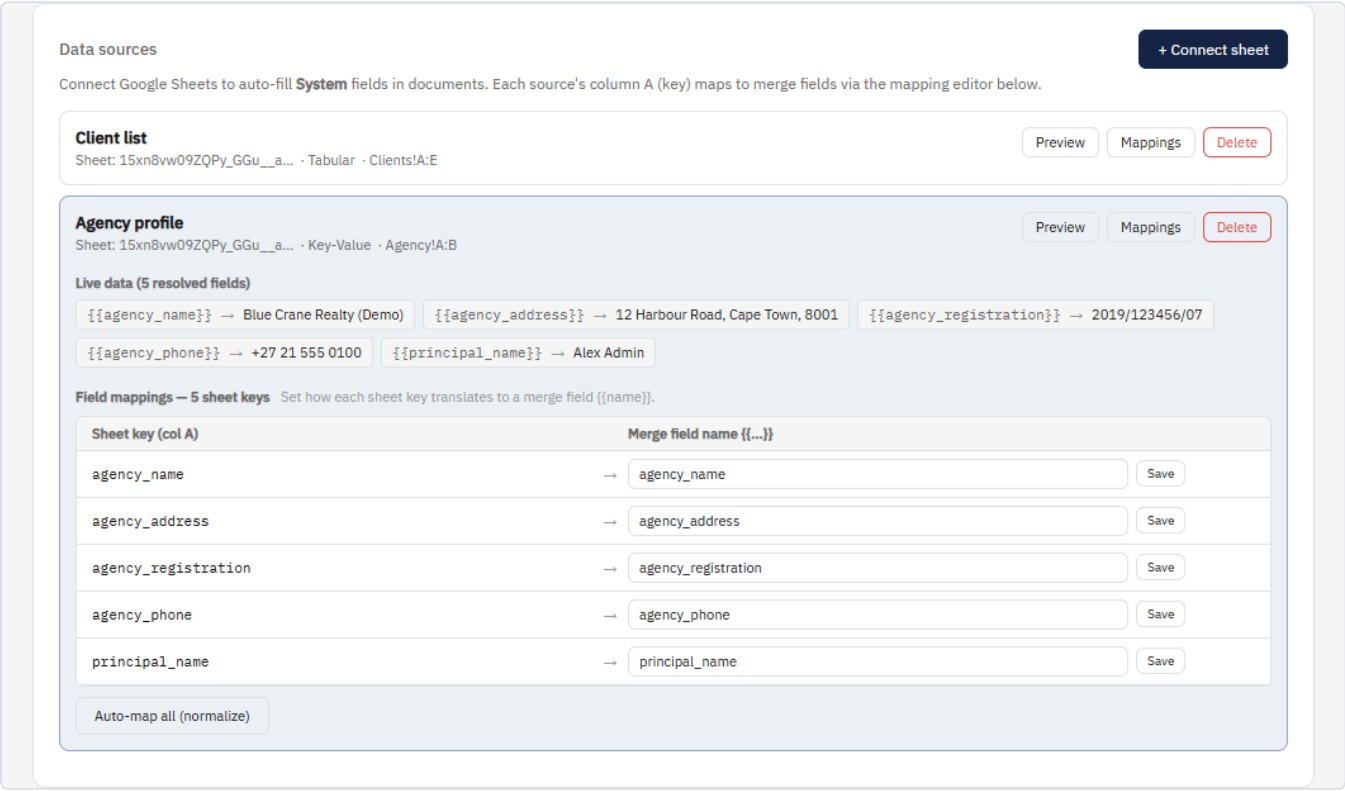
1. Open **Settings** and scroll to **Data sources**. Click **+ Connect sheet**.
2. **Name:** anything you will recognise, e.g. "Agency profile". **Spreadsheet ID:** the long code in the sheet's web address, between `/d/` and `/edit`.
3. **Sheet / Range:** the tab and columns to read, e.g. `Agency!A:B`. **Format: Key-Value**. Click **Connect**.



Connecting a Key-Value sheet.

Check it and map it

Click **Preview** to see exactly what Signetec reads: each value with the tag it will fill. If a name in your sheet does not match the tag in your templates, open **Mappings**, type the tag you want in the right-hand box, and click **Save**. (For example, map `agency_phone` to `office_number` if that is what your templates use.) **Auto-map all** saves the tidied-up names in one go.

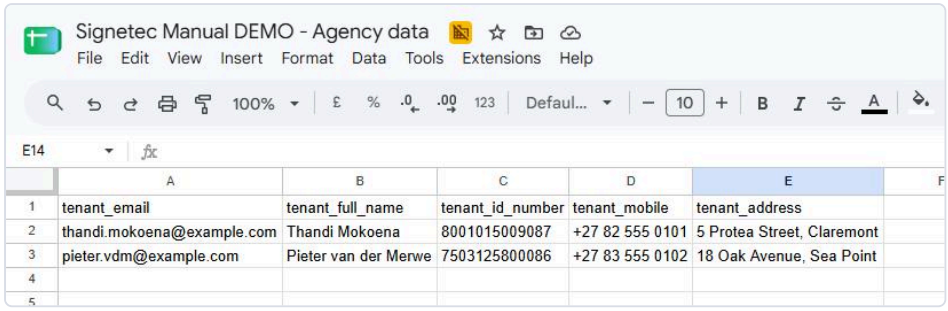


Preview (live data) and Mappings for the Agency profile sheet.

> **Note.** A Key-Value sheet applies to **every** document automatically; you do not choose it per document. Tags set up as ● System fields are the natural fit.

3.4 Google Sheets: client lookup (Admin sets up; Agents use)

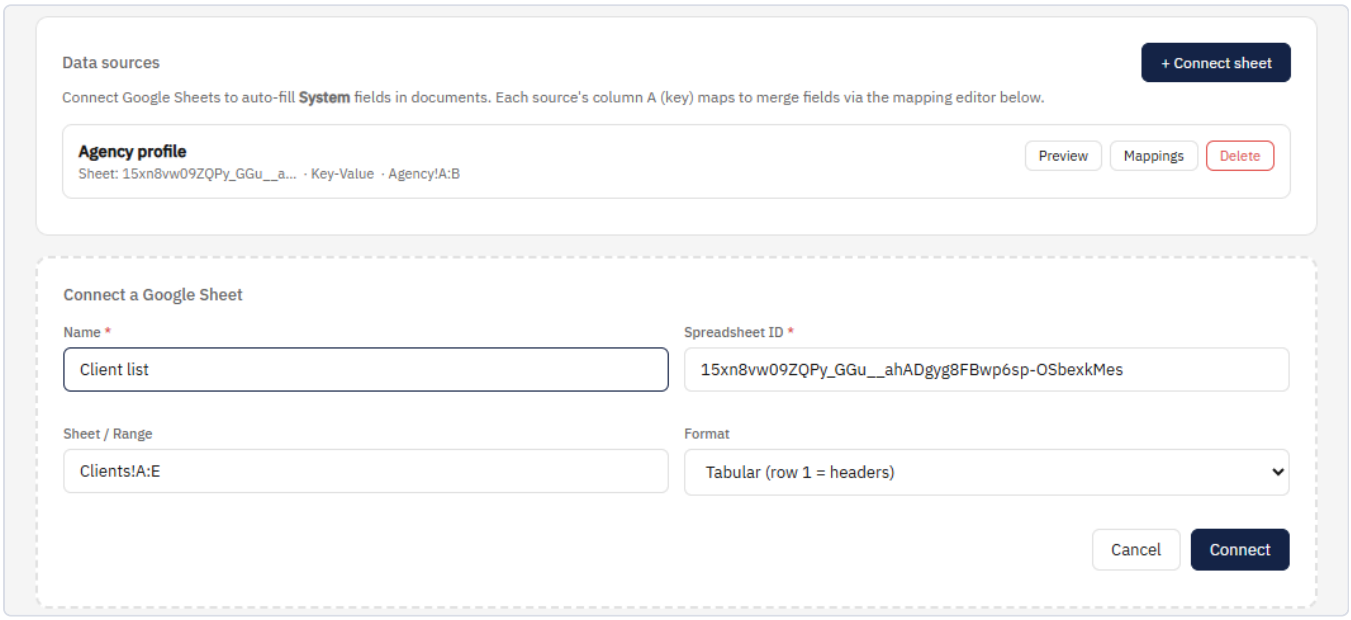
A **Tabular** sheet is a list of records: one row per client or property, a heading row at the top. Agents pull one row into a document using **Prefill from Google Sheets**. It never fills documents by itself.



	A	B	C	D	E	F
1	tenant_email	tenant_full_name	tenant_id_number	tenant_mobile	tenant_address	
2	thandi.mokoena@example.com	Thandi Mokoena	8001015009087	+27 82 555 0101	5 Protea Street, Claremont	
3	pieter.vdm@example.com	Pieter van der Merwe	7503125800086	+27 83 555 0102	18 Oak Avenue, Sea Point	
4						
5						

A “tabular” sheet. The headings are exactly the tags they will fill.

1. **Name the headings exactly like the tags** you want filled (`tenant_email`, `tenant_full_name` …). Prefill matches by heading.
2. Share the sheet as in 3.3, then **Settings → Data sources → + Connect sheet**. Choose the range (`Clients!A:E`) and Format **Tabular (row 1 = headers)**.



Connecting a Tabular sheet: choose Format “Tabular (row 1 = headers)”.



Both sources connected: one Key-Value (automatic), one Tabular (lookup).

> **Format matters.** Choose Key-Value for organisation-wide details and Tabular for lists of clients. Do not use Key-Value for a client list: it would apply to every document.

3.5 Typed on the Generate screen

Anything not supplied by a profile or a sheet is typed by the agent while generating (chapter 4). Whatever is typed here wins over every other source. When a client row has been pulled in with **Prefill**, the agent can still correct any value before generating.

Matching profile values to tags. If your profile contains a value the template does not use by that name, the Generate screen shows an orange box listing it. Choose the tag it belongs to and click **Apply now** (just this once) or **Save** (remember it for next time). Choose *Don't map* to ignore it.

3.6 Filled by the signatory

Mark a tag ● **Signatory** in ⚙ Fields (2.3) when only the person signing can supply it: their ID number, for instance. The agent leaves it blank and sees it listed as "Signatory will fill". The signatory completes it on the signing page, and it is inserted into the document before they sign.

3.7 Troubleshooting

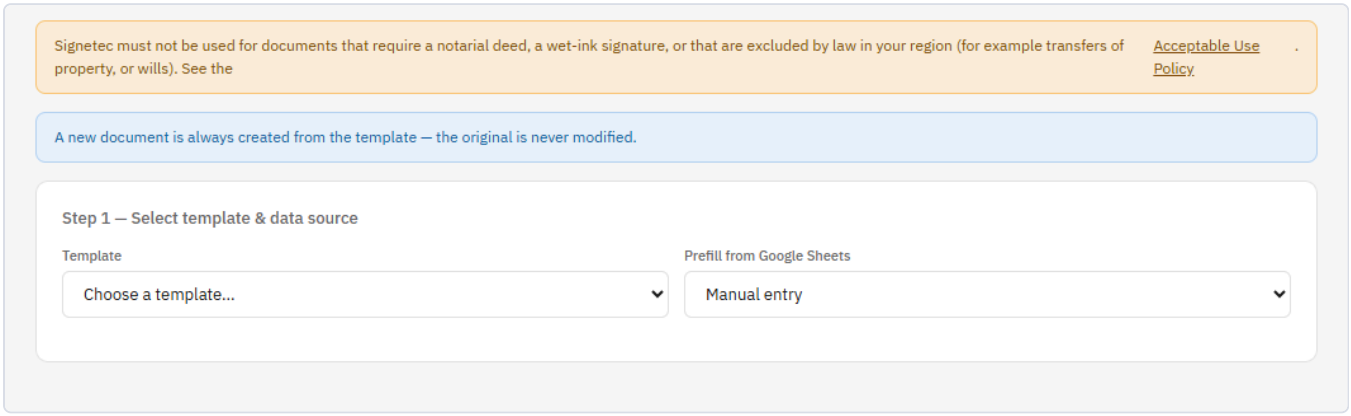
What you see	Likely cause and fix
A tag such as `{{tenant_id_number}}` still shows in a generated document	It is a ● Signatory field (or the signature, date or place): the signer completes it when signing. Optional fields left empty come out blank and are listed after generating; mark a field **Required** (2.3) if it must always be filled.
"Required fields missing" when generating	Fill in the fields named in the message. Required fields come from ⚙ Fields (2.3); a required field supplied by your profile or sheet (a ● System field) must have a value there.
A System field is empty	Check the Sheet name or mapping produces exactly the tag used in the template (**Settings** → **Data sources** → **Preview**). Or the agent's profile value is empty.
Preview shows an error or no data	The sheet is not shared with the Signetec service account (its address is in **Settings** → **Data sources**), the Spreadsheet ID is wrong, or the range (tab name) is wrong.
Prefill says "No matching row found"	The match column must be a heading in your sheet, and the match value must equal a cell in that column exactly.
"Complete your profile before generating documents"	A required profile field is empty. Fill it in under **My profile**.
New tags added to a Google Doc do not appear	Click ↻ **Sync** on the template (2.2), then set the new fields up in ⚙ Fields.

4 On-the-fly preparation (Agent)

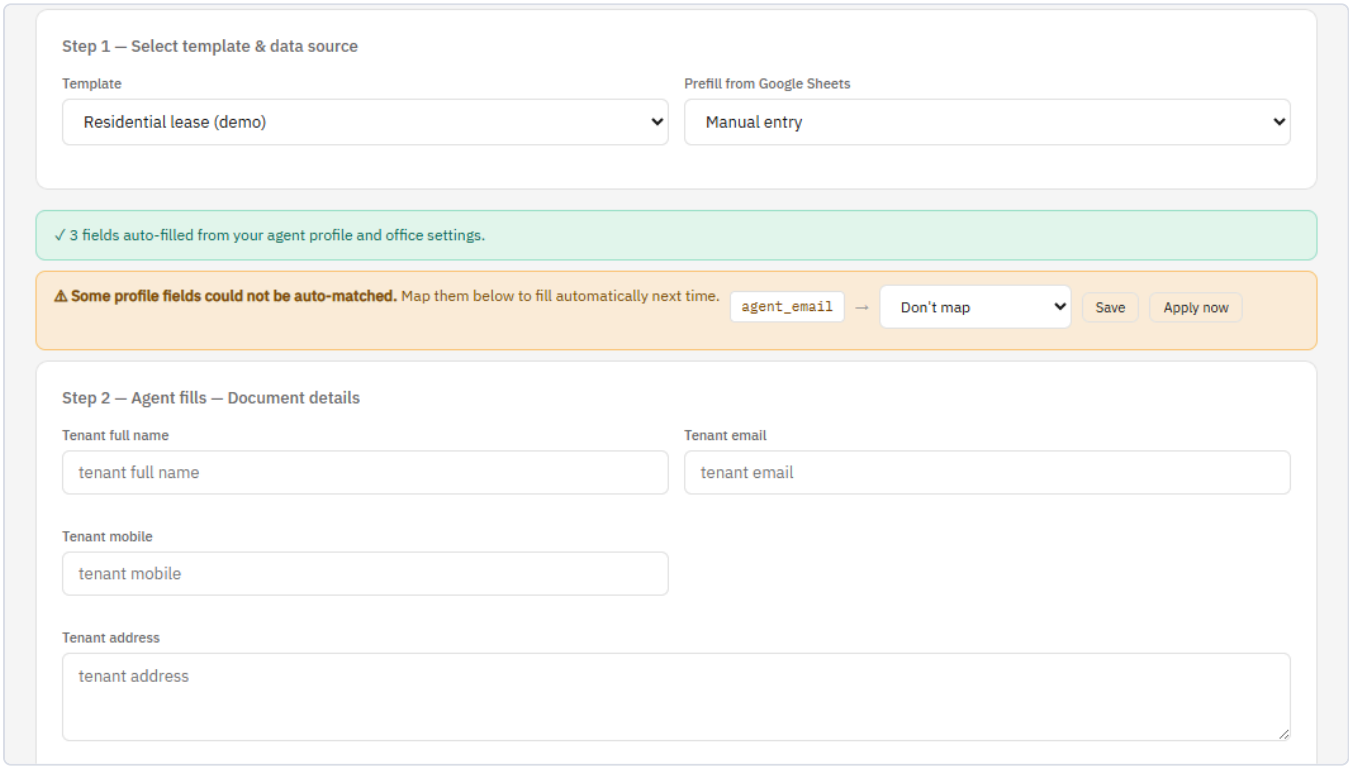
This is the everyday job: turning a template into a finished document for a particular client, in a couple of minutes.

1. Click **Generate** (or **Use** on a template). Read the legal notice at the top.
2. Choose the **Template** (*Step 1* on screen).

3. *Optional:* choose a sheet under **Prefill from Google Sheets**, type the **match column** (for example `tenant_email`) and the **match value** (the client's email), and click **Prefill fields from sheet**.
4. Complete the remaining ● Agent fields (*Step 2*). A red outline means a required field is empty.
5. Write or paste the **content zones** (*Step 3*).
6. Check the name under **Document name** and click **Generate document**. A red asterisk marks required fields, and the form will not continue until they are filled. If optional fields are empty it lists them and asks you to confirm.

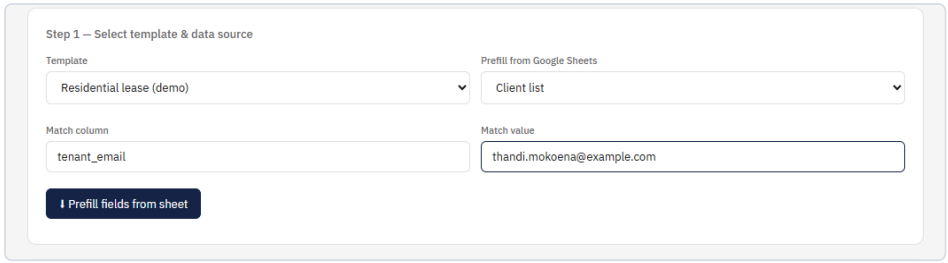


Generate: the legal notice, then Step 1.

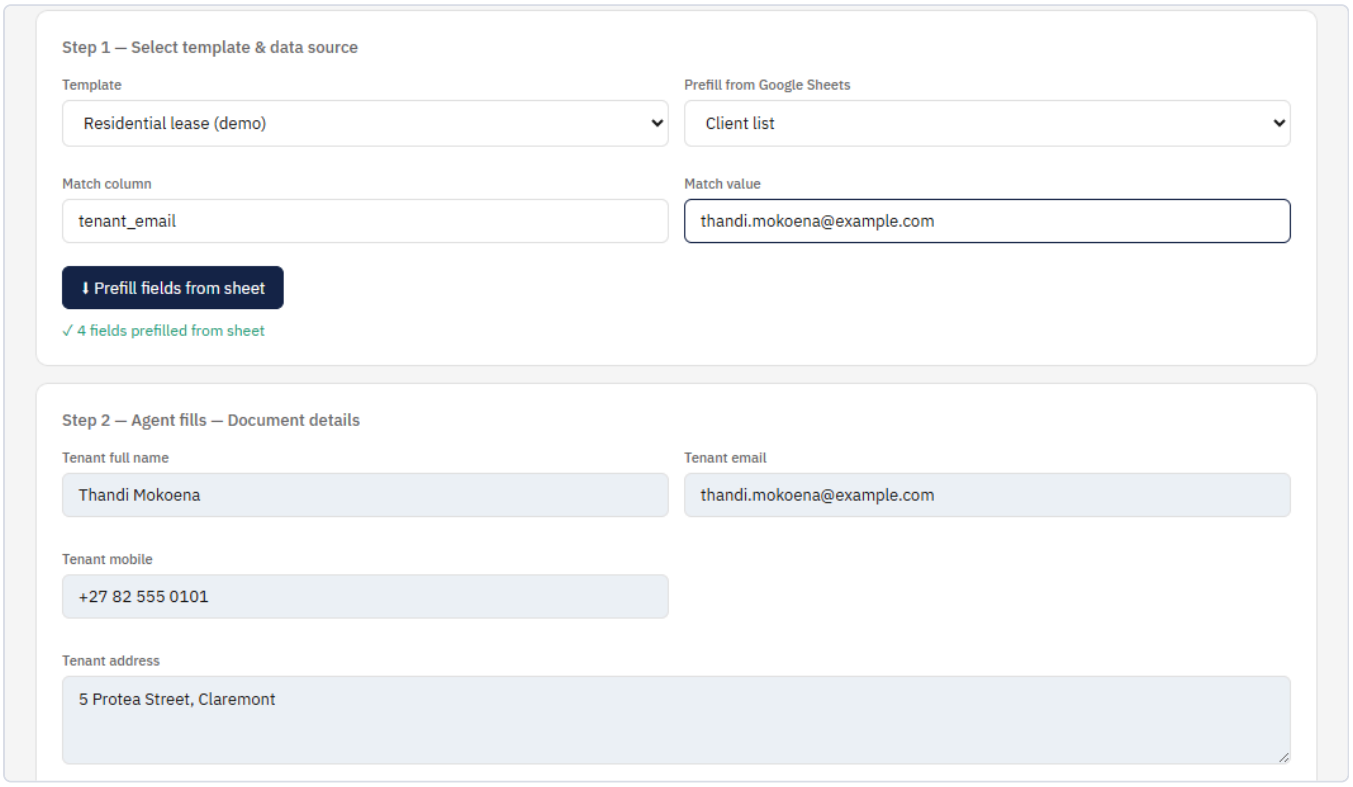


Choosing the template shows Step 2: the fields the agent fills in. Your own details and the agency's are filled automatically.

Prefill from a client sheet

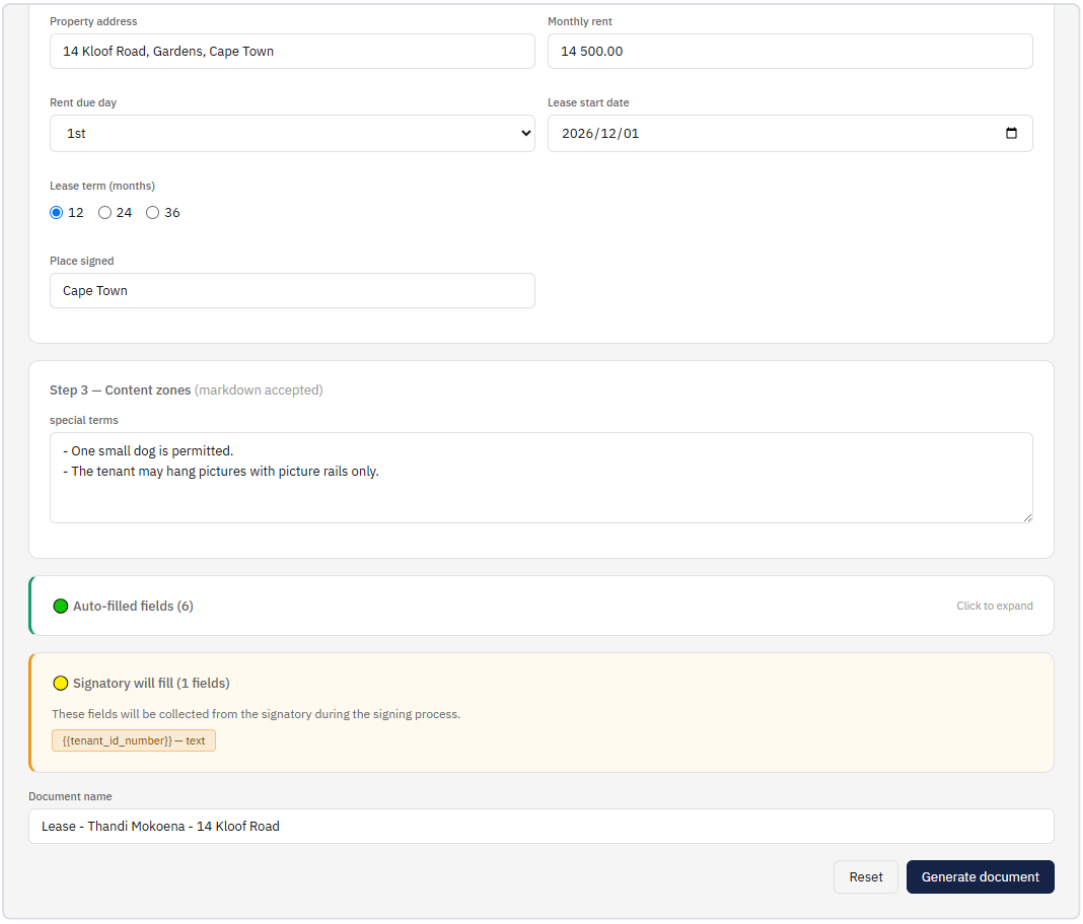


Choose the sheet, then say which client to look up.



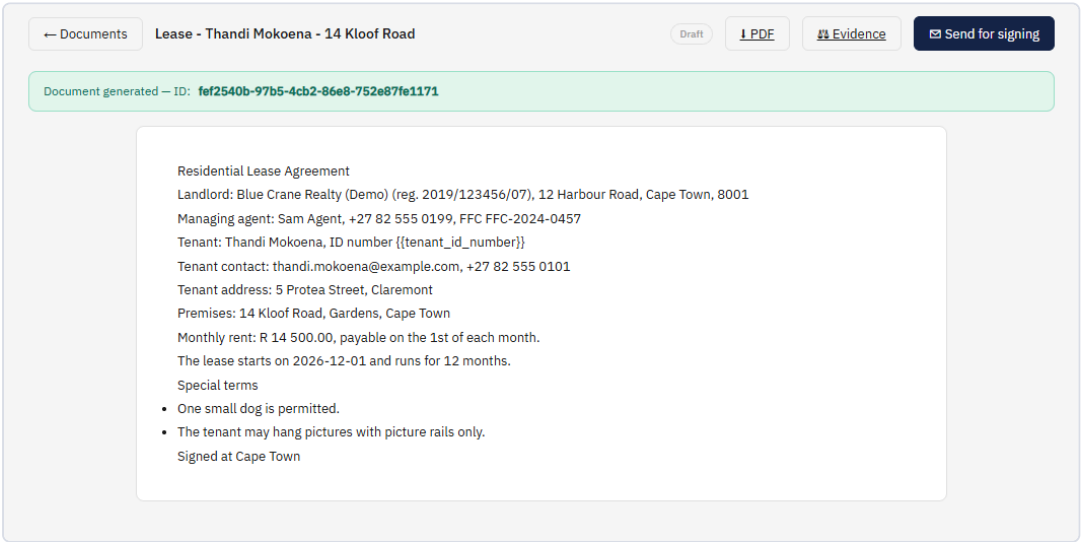
The four matching fields are filled in from the client's row (briefly highlighted). Anything can still be edited.

Finish and generate



The completed form. "Auto-filled fields" (green) shows what Signetec fills itself; "Signatory will fill" (amber) is left for the signatory.

Signetec creates the document, and shows it with the **Draft** status, with a note listing any optional fields that were left blank. Read it through. From here you can download the **PDF**, view the **Evidence** package, or click **Send for signing**.



The generated document. Tenant ID number still reads as a tag: the signatory will fill that in when signing.

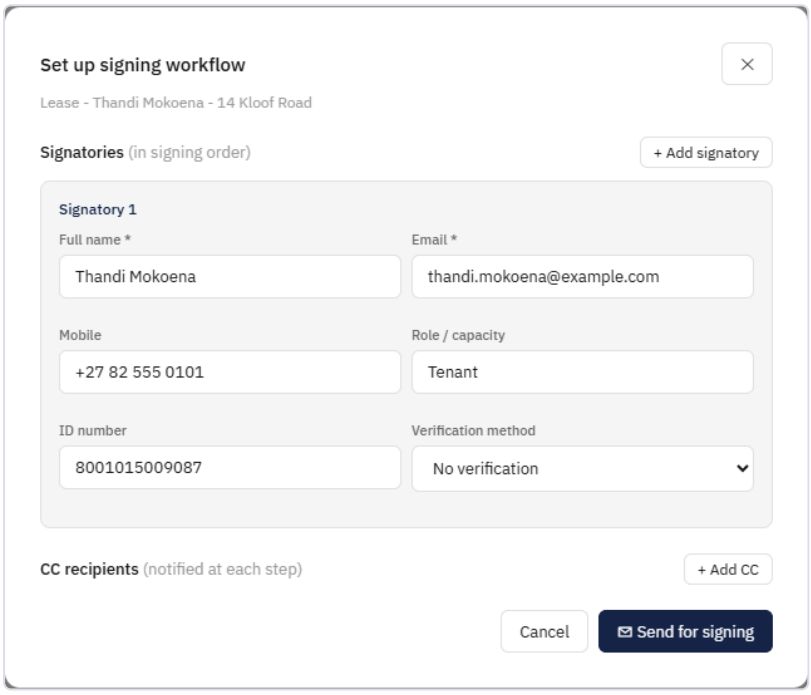
> **Tip.** Click **Reset** to start the form again. A document that is wrong can be archived from the Documents list; generating again always starts from the template.

5 Sending and signing

5.1 Send for signing

From the document (or from **Documents**, using ✉ **Sign**) set up the signing workflow:

1. Under **Signatories**, enter each signer's **name, email** and, optionally, mobile, role and ID number. **+ Add signatory** adds more, who sign in the order listed.
2. Choose the **verification method** for each signer: **Email OTP**, **SMS OTP** (a one-time code they must enter) or **No verification**.
3. Add **CC recipients** if others should be notified, and click ✉ **Send for signing**.



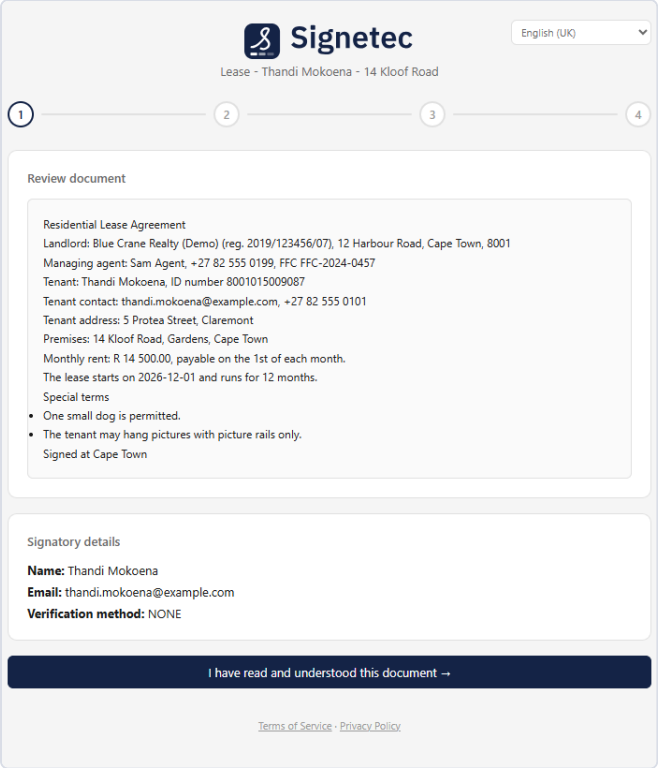
Setting up the signing workflow.

Each signer receives an email with a personal link that expires after a few days. The document's status moves from **draft** to **pending**; open 📋 **Workflow** on the Documents list to follow progress.

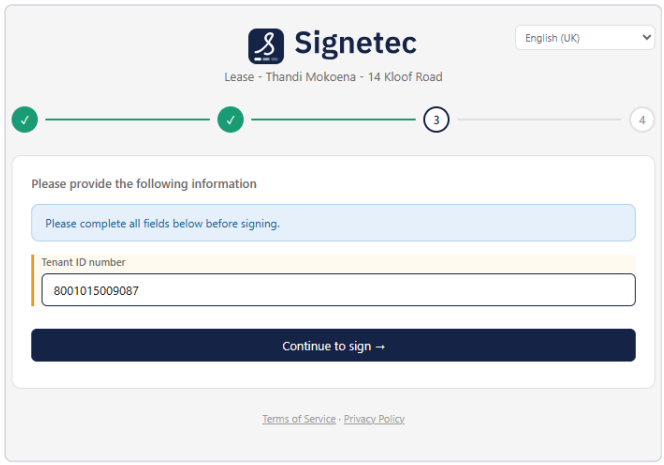
5.2 What the signatory sees

The signatory needs only the email link, with no account. They are taken through four short steps:

1. **Review** the document and confirm they have read it.
2. **Verify** their identity (enter the code, if you asked for one).
3. **Provide information**: complete any ● Signatory fields (this step appears only when the template has some).
4. **Sign**: confirm the signing location and sign.



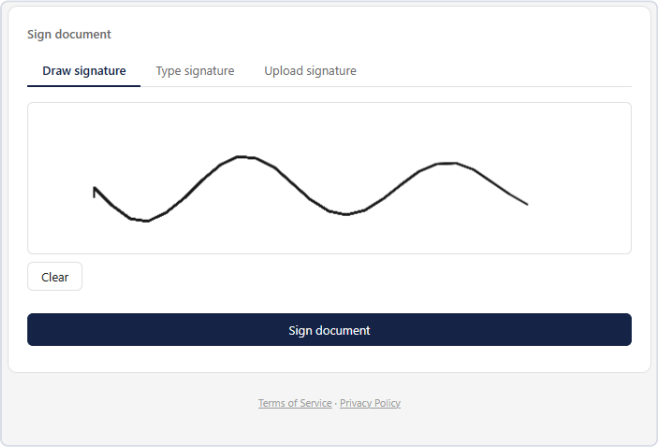
Step 1: the signatory reviews the document.



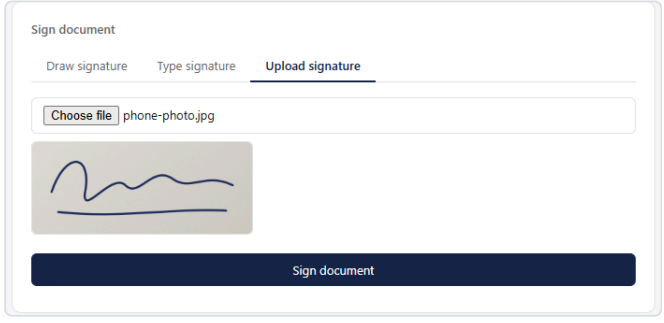
Step 3: fields marked Signatory are filled in by the signer.

5.3 Three ways to sign

Draw signature	Sign with a finger, stylus or mouse in the box.
Type signature	Type their name; it is shown in a signature typeface.
Upload signature	Upload an image of a handwritten signature: a scan or a **photo** (PNG, JPEG, GIF or WebP). On a phone, the file picker offers the camera and the photo library. Signetec trims the empty space around the signature automatically, leaving a small margin, and shrinks very large photos.



Draw signature.

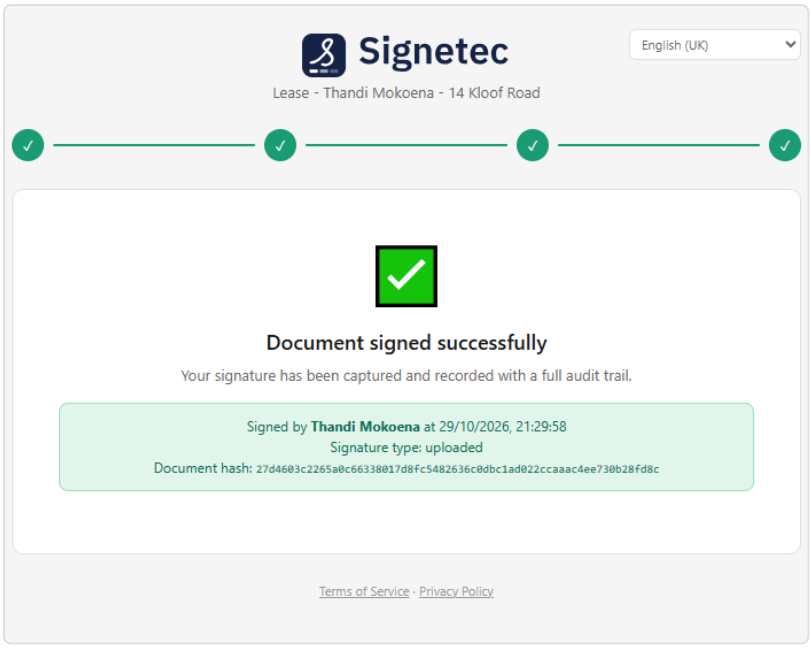


Upload signature: a photo of a signature on paper, trimmed to the signature automatically. The preview is shown before signing.

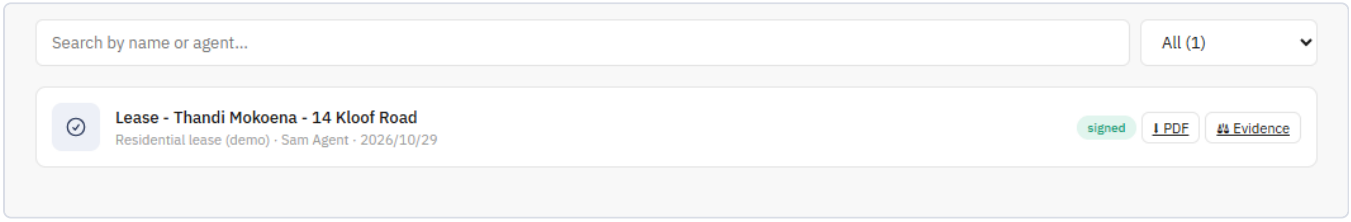
> **Tip for signatories using a photo.** Sign on plain white paper in good light and photograph it straight on. There is no need to crop the photo first.

5.4 Done

When every signatory has signed, the document status becomes **signed**. Signetec records a full audit trail, fixes the document's fingerprint (hash) and timestamps it. Download the signed **PDF** and the **Evidence** package from the Documents list. If your organisation has linked a Google Drive (6.2), both are also saved there automatically, and Signetec deletes its own copy after a set number of days, so keep the Drive copy safe.



The signatory's confirmation.



The Documents list. The ⚖ Evidence button opens the evidence package.

6 Where your documents are kept (Admin)

Signetec keeps what it needs to run the service and nothing it does not. This chapter says what is stored, where, for how long, and how to keep your own copies. The Terms of Service (section 12A) is the authoritative statement; the figures below are the ones in force when this guide was written (data policy version 2026-10-1).

6.1 What Signetec keeps, and for how long

What	Where, and for how long
Templates made in Signetec	On Signetec until you delete them or the account is closed.
Templates linked to Google Docs	**Not stored.** Only the Doc's ID, name, field list and field set-up are kept. The text is read from your Google Drive when needed and held in memory for at most 5 minutes.
Generated documents and signing details	On Signetec from the moment they are generated: the text, the details typed in, and what signatories supply (name, email, mobile, ID number, signature, IP address, location).
Signed documents, **no** Google Drive linked	On Signetec until the account is closed.
Signed documents, Google Drive linked	Copied to your Drive when the last signature is in. Signetec then keeps **its own copy for 90 days** and deletes it. Nothing is deleted before the copy to your Drive has succeeded.
Proof record	Document fingerprint, signing times, signer names and emails, timestamp reference and the audit trail: **7 years** after completion, then deleted.
Evidence packages	**Not stored.** Built when you ask for one. After Signetec has deleted its copy of a document, only the copy saved in your Drive remains.
If you close the account	**Everything is deleted at once** and cannot be recovered. You are asked to confirm first.
If access ends (cancelled, or a trial that lapsed)	You can no longer open or download documents. Content is kept for a period, then deleted; you can subscribe again before then. You are emailed when access ends and before deletion.
Backups	Deleted data can remain in encrypted backups for up to 7 days.

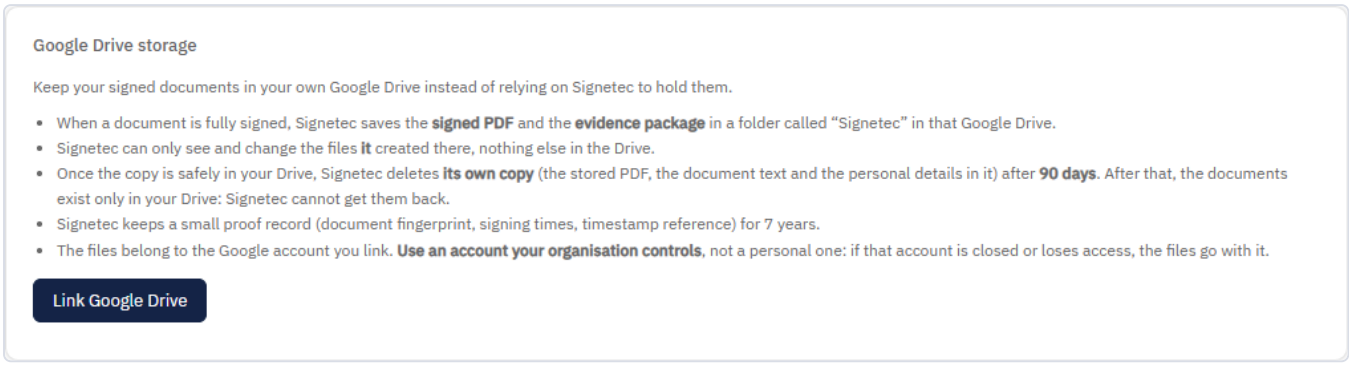
> **Keep your own copies.** Signetec cannot get back what it has deleted under these rules. Keep a copy of every document you may need in future somewhere secure that you control.

6.2 Save signed documents in your Google Drive

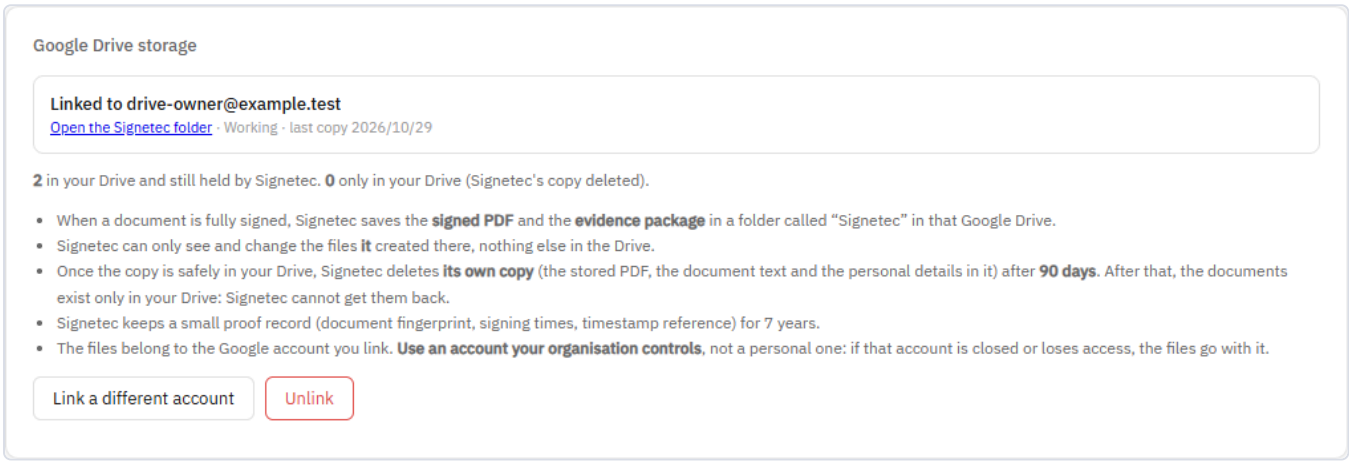
An organisation Admin can link a Google Drive in **Settings** → **Google Drive storage**. From then on, each fully signed document is saved as two PDFs (the signed document and its evidence package) in a folder called "Signetec" in that Drive.

1. Open **Settings** → **Google Drive storage** and read what it says. Click **Link Google Drive**.

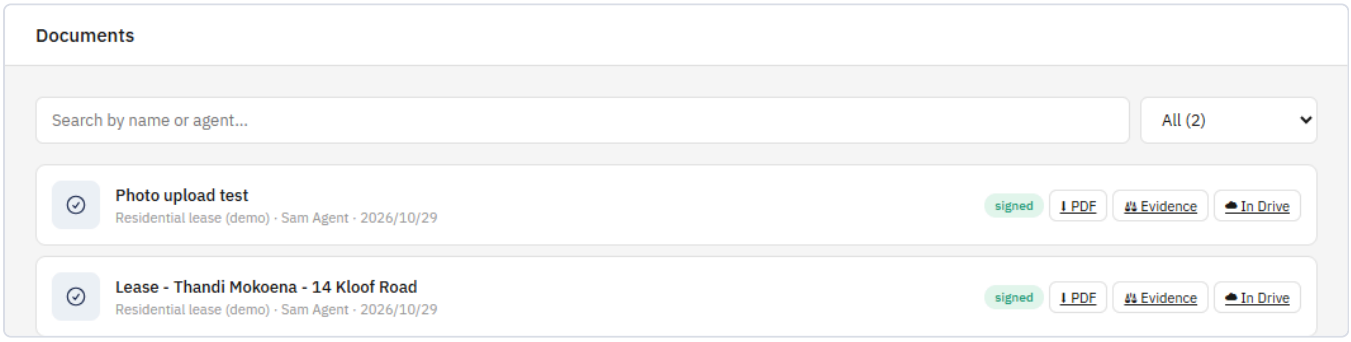
2. In Google, choose the account and allow access. Signetec asks only to see and change **files it creates itself**, nothing else in the Drive. Leave the Drive permission ticked.
3. You return to Settings, which now shows whose Drive is linked, a link to the folder, and how many documents are copied.



Settings → Google Drive storage, before linking. It states exactly what will happen.



After linking: the account, the folder, and how many documents are in Drive.



Documents that are also in Drive show an **In Drive** button. Once Signetec has deleted its own copy, the PDF and Evidence buttons become **PDF in Drive** and **Evidence in Drive**.

> **Use an account your organisation controls.** The files belong to the Google account you link. If that account is closed or loses access, the files go with it. If Signetec can no longer reach the Drive, Settings shows "Action needed" and signed documents stay on Signetec until you link it again. Nothing is deleted while the link is broken.

Unlink removes the link. Files already in your Drive stay there. Documents not yet copied stay with Signetec, and new documents are no longer copied. **Copy waiting documents now** retries any that have not gone

through.

6.3 Templates linked to Google Docs

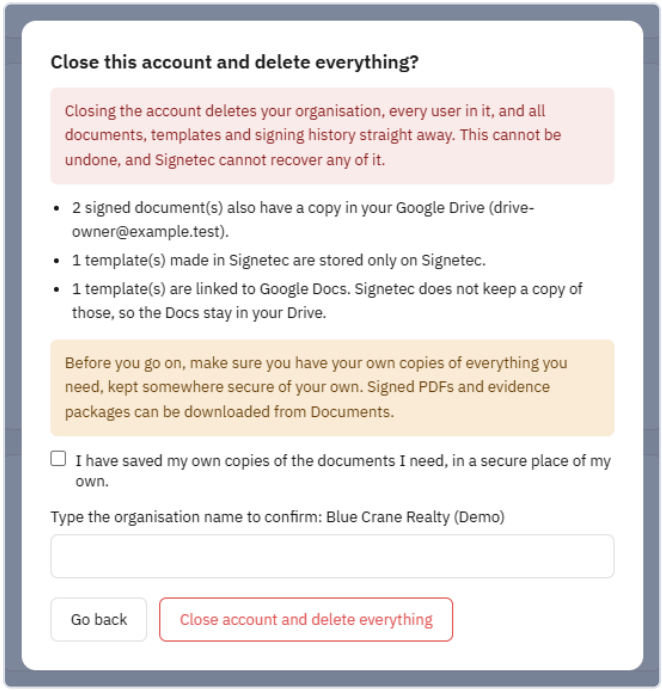
Because Signetec reads a linked Doc live, it must still be shared with Signetec's Google account (the address is shown in **Settings** → **Data sources** and on the Drive library page; see 3.3). If the Doc is deleted, or sharing is removed, generating from that template stops with a message saying so. Documents already generated are unaffected; they carry their own copy of the text.

6.4 Before you cancel or close an account

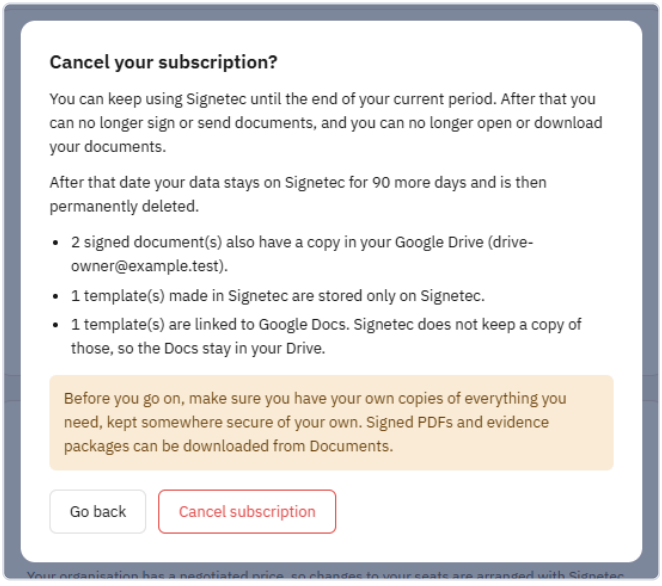
On **Account** (the Billing link) the **Cancel subscription** and **Delete organisation** buttons open a warning that lists, from your own account:

- how many signed documents exist **only on Signetec**, how many are also in your Drive, and how many are in your Drive only;
- how many unsigned documents and in-app templates would be lost, and how many templates are linked Google Docs (which stay in your Drive);
- what happens to your access, and your data afterwards.

To **close the account** you must also tick that you have saved your own copies and type the organisation's name. Closing deletes everything immediately and cannot be undone. Signetec cannot recover it.



Closing an account: what would be lost, and a required confirmation.



Cancelling a subscription: when access ends and what happens to the data.

To get copies, open **Documents**, download the **PDF** and **Evidence** of each signed document, and store them somewhere secure of your own. Documents already in your Drive are there already.

7 Quick reference

Checklist: a new template, start to finish

1. Write the document with `{{tags}}` and `{{zone:name}}` blocks (in Signetec, or in a Google Doc and import it).
2. Open ⚙ **Fields**: set each tag to System, Agent or Signatory; set input types, options and Required; save.
3. Make sure the System tags have a source: an agent profile field, or a name in your organisation sheet (check with **Preview**).
4. Generate a test document and read it. Check the list of fields left blank, and that required fields are really marked Required.

Checklist: before an agent generates

1. My profile is complete (name, mobile, FFC number or other required fields).
2. I know which template to use, and which client row to look up (if using a sheet).

Which source should supply this tag?

The detail is…	Use
About the person generating the document	Agent profile / profile field
The same for the whole organisation	Key-Value Google Sheet
About one client or property, and already recorded in a sheet	Tabular Google Sheet + Prefill
Different every time, known to the agent	Agent field, typed on Generate
Known only to the signer	Signatory field
A paragraph or clauses	Content zone

Words used in this guide

Term	Meaning
Template	A master document containing merge tags. Never changed by generating.
Merge tag / merge field	A placeholder such as `{{tenant_full_name}}` that is replaced by a value.
Content zone	A placeholder for a block of free text: `{{zone:special_terms}}`.
Data source	A connected Google Sheet that supplies values.
Mapping	A rule that says “this name in the sheet fills that tag”.
Profile field	An extra detail your organisation records about each person (e.g. FFC number).
Signatory	A person who signs the document.
Linked template	A template whose text stays in your Google Doc. Signetec reads it when needed and does not store it.
Proof record	The small record kept after a document’s content is deleted: fingerprint, signing times, signer names and emails, timestamp, audit trail.
Evidence package	The audit trail, document fingerprint and timestamp that prove who signed what, and when.