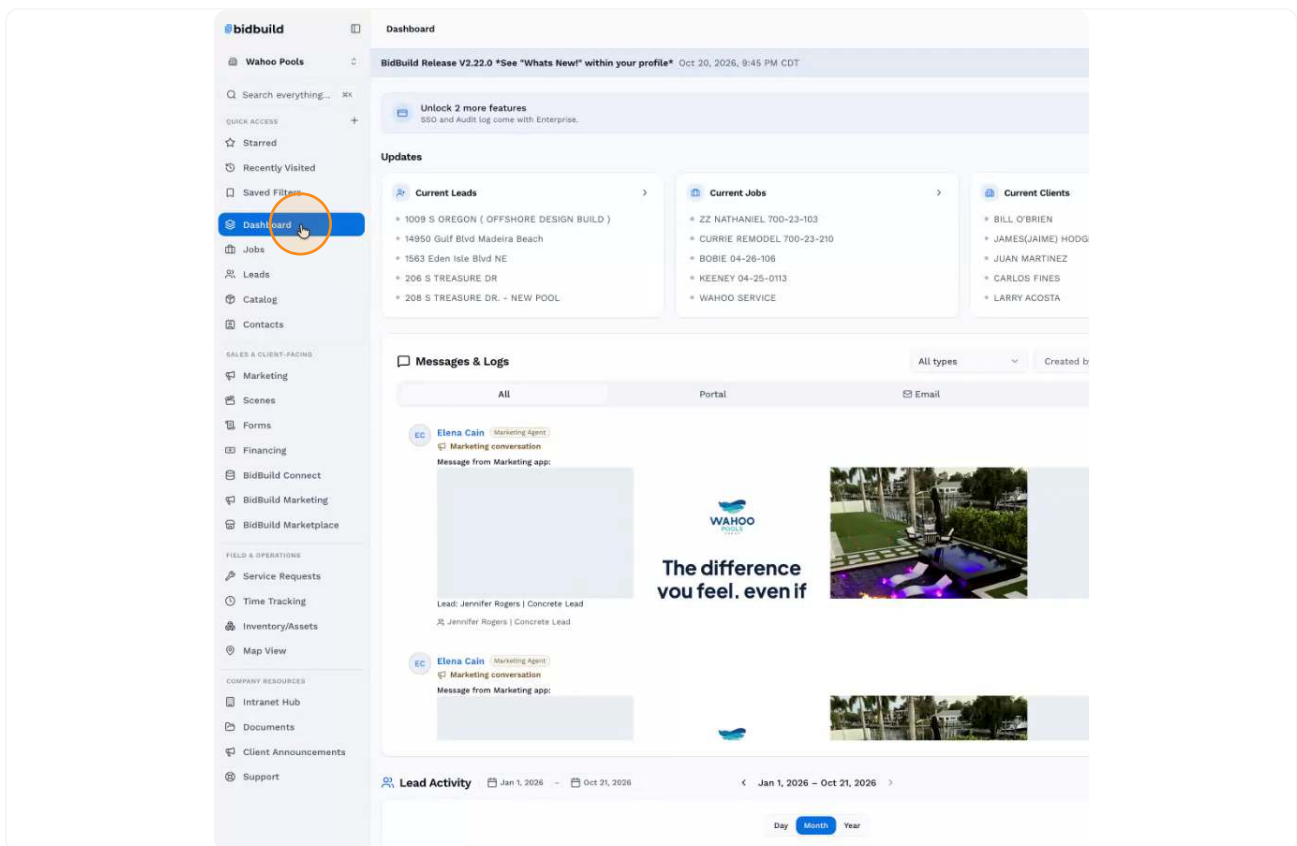


Managing E-Signatures and Forms in Buildsign / SignNow

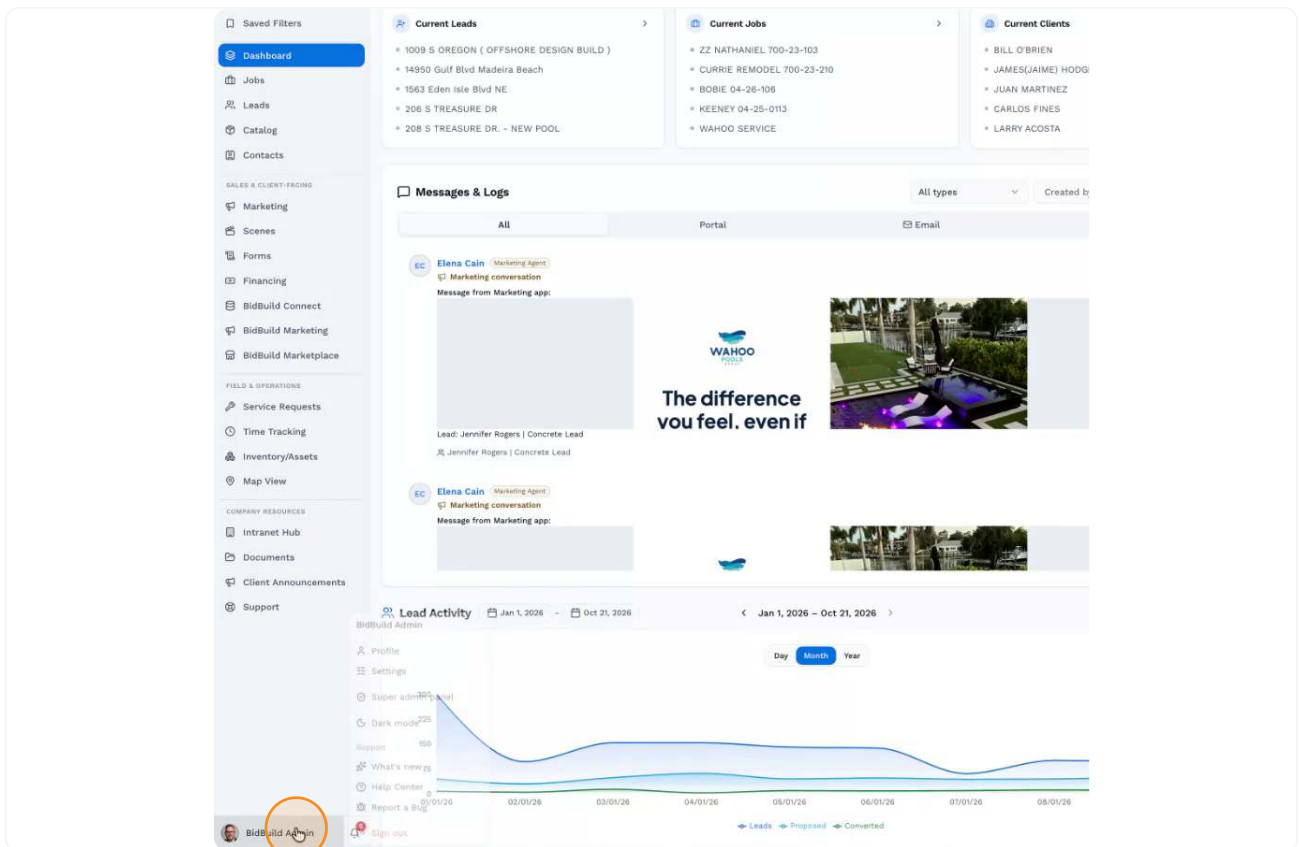
This document explains how to connect your SignNow account (or purchase signature credits), upload forms, send them for e-signature, and organize completed documents and folders within the system.

Step 1: Access Profile and E-Sign Settings

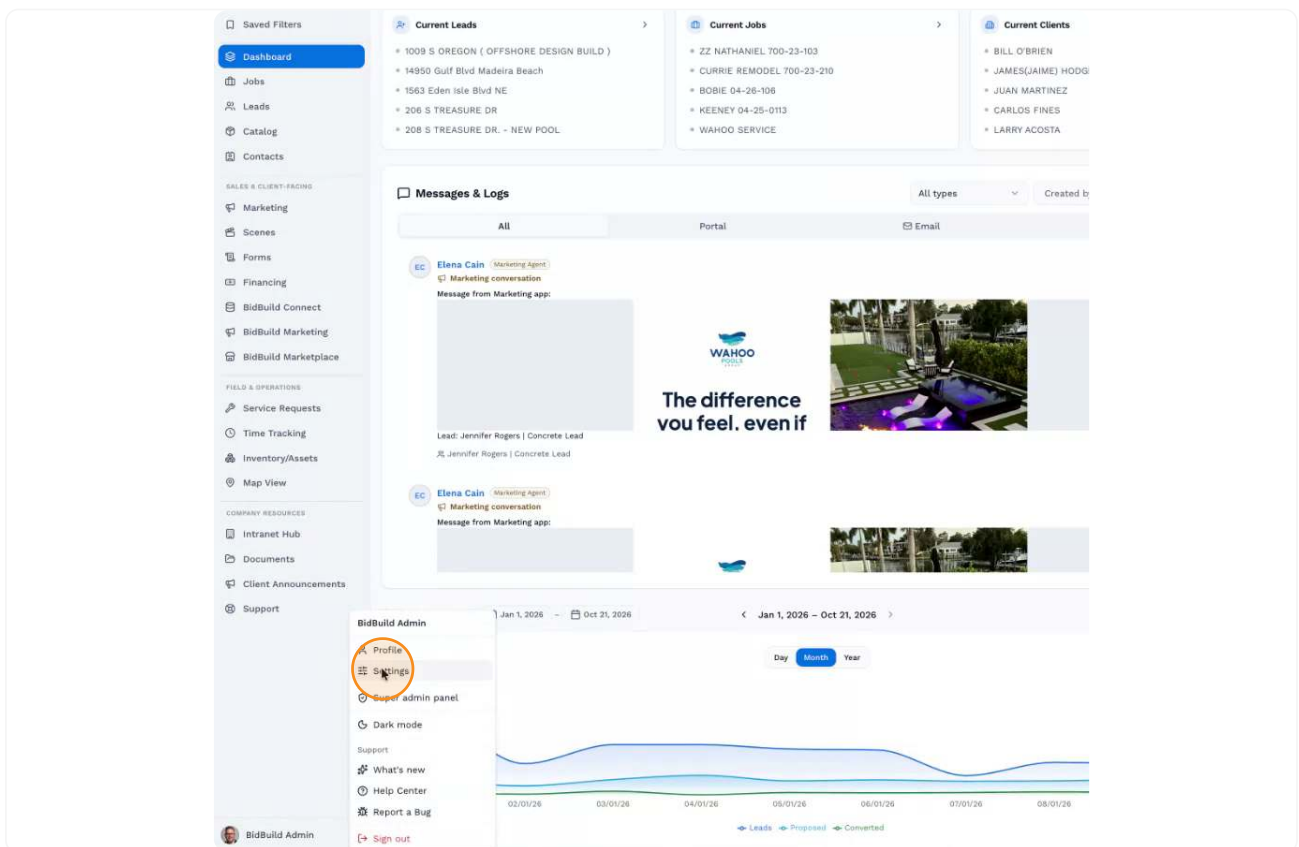
Use



Buildsign or SignNow and log in to your account. Navigate down to your Profile and Settings area. Inside the settings section, open the e-sign configuration area

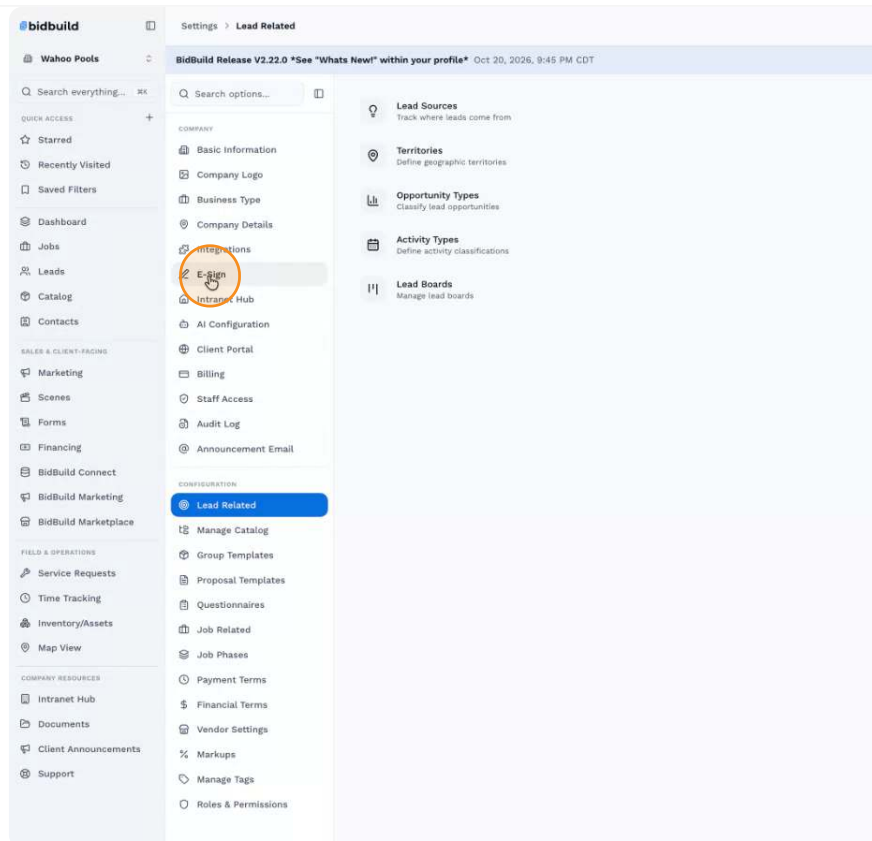


and then go up to your e-sign options

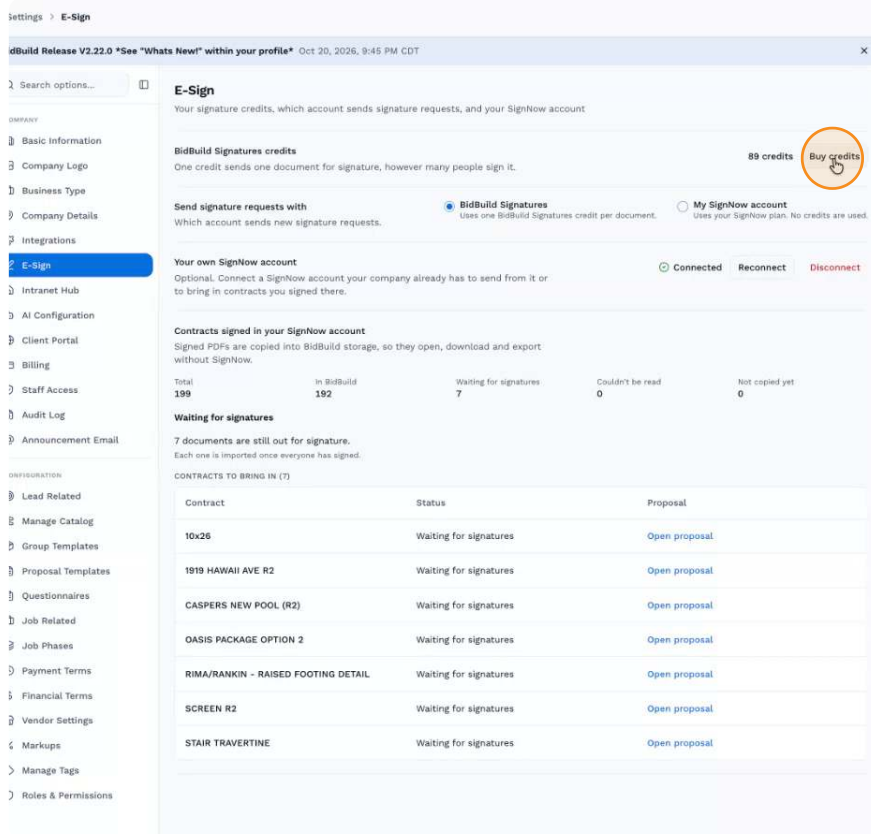


Step 2: Connect SignNow or Purchase Signature Credits

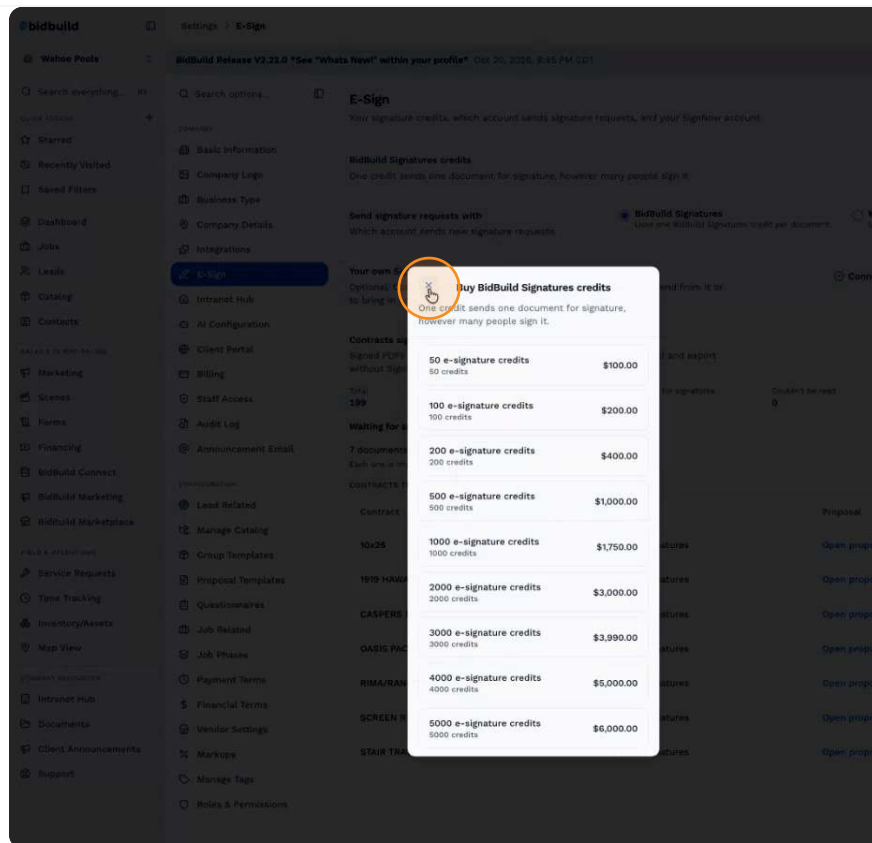
If you would like to connect your



existing SignNow account, use this e-sign settings space to complete the connection. If you do not want to connect an existing account, purchase signature credits from Bid, Build, Sign by selecting the “Buy Now Credits” option. Once you purchase,



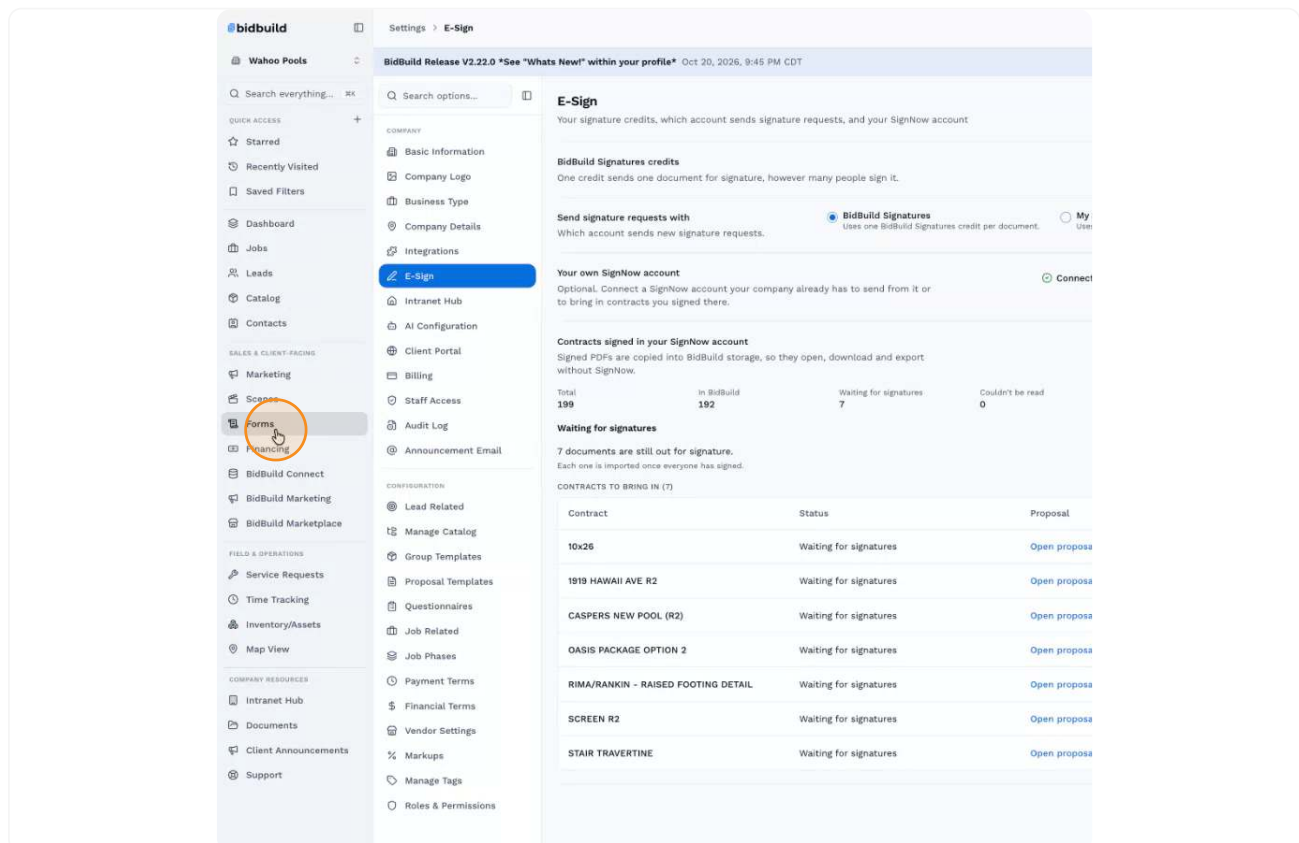
the system will track your credits.



Those credits are counted against signature envelopes.

Step 3: Open the Forms Section

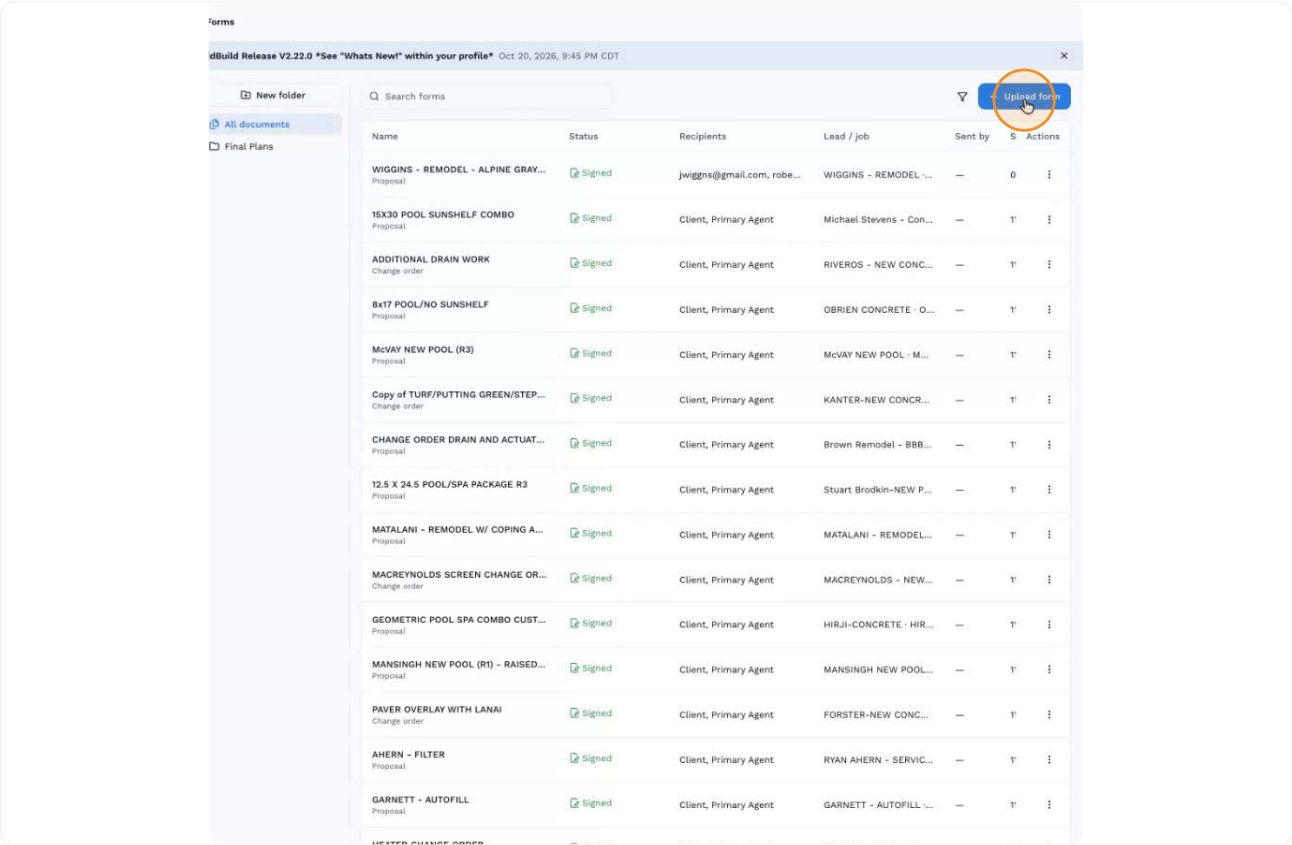
Navigate to the Forms section in the left-hand menu; this is where all of your signatures



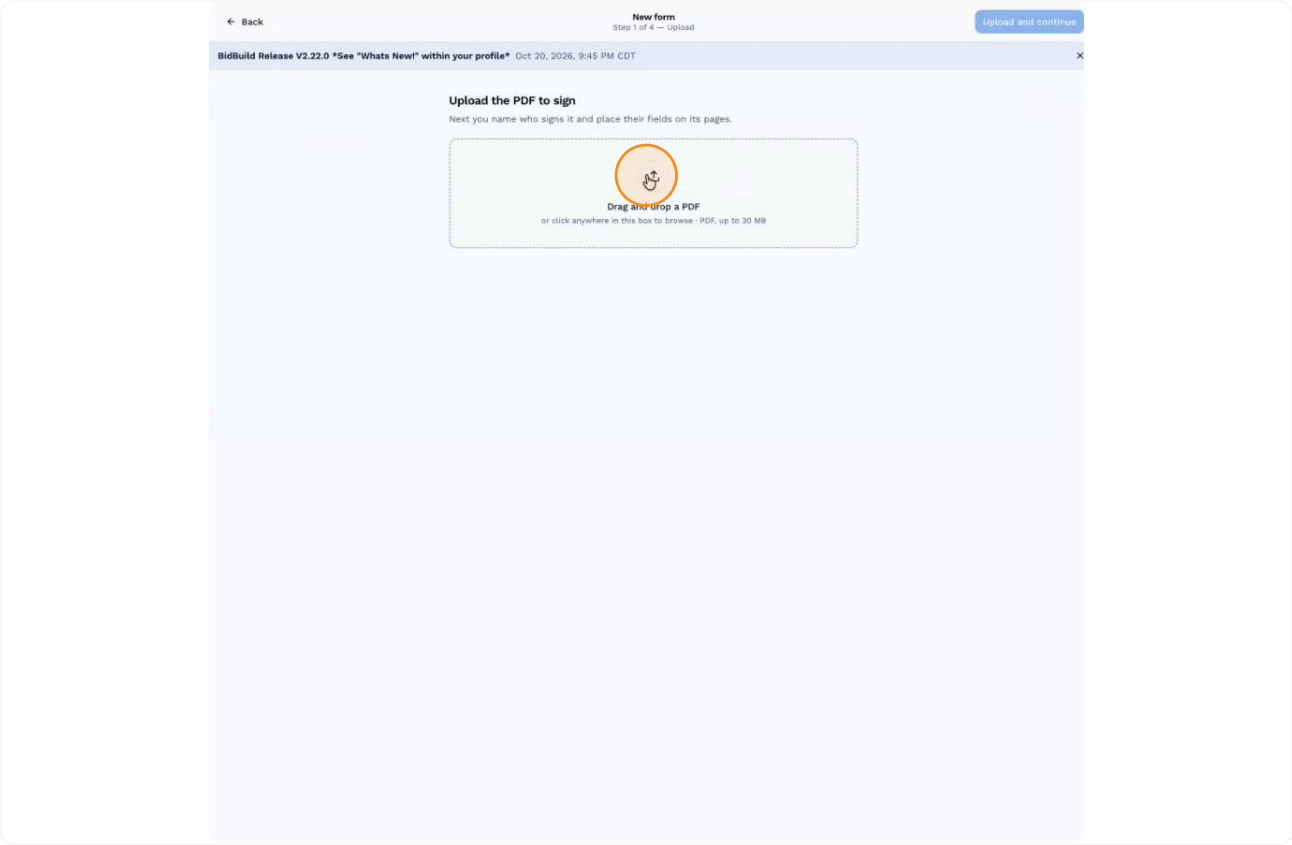
and related forms will be stored.

Step 4: Upload a New Form

To add a new form, click **Upload Form**. Select the document



that you would like to have signed. Once



the file is uploaded, you can rename the file. You can also attach it to a specific lead or to

← Back

New form
Step 1 of 4 — Upload

BidBuild Release V2.22.0 *See "Whats New!" within your profile* Oct 20, 2026, 9:45 PM CDT

Upload and continue

Upload the PDF to sign
Next you name who signs it and place their fields on its pages.

Drag and drop a PDF
or click anywhere in this box to browse - PDF, up to 30 MB

GetSalesOrder.pdf

Form name
GetSalesOrder

Lead (optional)
No lead

Job (optional)
No job

a specific job. If

← Back

New form
Step 1 of 4 — Upload

BidBuild Release V2.22.0 *See "Whats New!" within your profile* Oct 20, 2026, 9:45 PM CDT

Upload and continue

Upload the PDF to sign
Next you name who signs it and place their fields on its pages.

Drag and drop a PDF
or click anywhere in this box to browse - PDF, up to 30 MB

GetSalesOrder.pdf

Form name
GetSalesOrder

Lead (optional)
No lead

Search leads...

- 1009 S OREGON (OFFSHORE DESIGN BUILD)
- 14950 Gulf Blvd Madeira Beach
- 1563 Eden Isle Blvd NE
- 206 S TREASURE DR
- 208 S TREASURE DR. - NEW POOL
- 2101 W MARJORY AVE (OFFSHORE DESIGN)
- 2225 N RIDGEWOOD AVE

you do not assign it to anything, it will remain in this Forms section.

Step 5: Add Recipients and Signers

Next,

This screenshot shows the 'New form' interface at Step 1 of 4, 'Upload'. The title bar indicates the form is named 'GetSalesOrder.pdf' and was created on Oct 20, 2026, at 9:45 PM CDT. The main heading is 'Upload the PDF to sign', with a subtext: 'Next you name who signs it and place their fields on its pages.' A large dashed box contains an upload icon and the text 'Drag and drop a PDF' or 'click anywhere in this box to browse · PDF, up to 30 MB'. Below this, the file 'GetSalesOrder.pdf' is listed. The 'Form name' field contains 'GetSalesOrder'. The 'Lead (optional)' dropdown is set to 'No lead', and the 'Job (optional)' dropdown is set to 'No job'. A blue 'Upload and continue' button is circled in orange in the top right corner.

enter the email address of the person

This screenshot shows the 'Who needs to sign?' step (Step 2 of 4) for the 'GetSalesOrder' form. The title bar shows the form is 'Saved'. The main heading is 'Who needs to sign?' with the instruction: 'Add everyone who needs to sign. Each gets their own signing link by email.' There are two input fields: 'Full name' and 'Email address'. The 'Full name' field is circled in orange and contains the text 'Full name'. Below the input fields is a '+ Add recipient' button. On the left side, there is a sidebar menu with various navigation options, including 'Forms' which is currently selected.

you want to send the form to. You

can also add additional signers

by selecting the appropriate option. Once you have added all recipients, click **Save and Continue**.

Step 6: Place Signature and Form Fields

From

Back
GetSalesOrder
Step 2 of 4 — Recipients
Unsaved changes
Save and continue

dBuild Release V2.22.0 *See "Whats New!" within your profile* Oct 20, 2026, 9:45 PM CDT

Who needs to sign?

Add everyone who needs to sign. Each gets their own signing link by email.

Dave G

dave@bidbuild.app

+ Add recipient

here, drag and drop any required signature fields onto the document and resize

Filters

Dave G

0 Fields

Signature

Initials

Date signed

Text

Drag onto the page, or click to add.

Dave G still needs a signature or initials field.

SELECTED FIELD

Drag a field to move it, or drag a corner to resize it. Select a field to remove it.

880 Carlsbad Village Dr Suite 202
Carlsbad, CA 92008
(949) 373-3333 Fax (949) 373-3350

STOCK#0419150

Member PO#

CC961988

Carecraft PO#

08/11/2026

Received Date

SALES ORDER ACKNOWLEDGEMENT

VENDOR

AQUASTAR POOL PRODUCTS INC.

SHIP TO

WAHOO POOLS GROUP, INC.
6657 US-301 South
Riverview, FL 335783284 US
(813) 699-3282

PO Special Instructions-

PLEASE CHARGE SALES TAX. IF VENDOR IS UNABLE TO TAX, MEMBER IS RESPONSIBLE.

Member's Order Date: 08/11/2026

Date Received: 08/11/2026

Date Released To Vendor: 08/11/2026

Ship Date

Ship Via

FOB Point

A.S.A.P

Most Economical

Ventura, I

Quantity	Model #	Description	Unit Price
1	20 ea	PC103 Light Gray Perfect Circle	\$243.54

Product Total

Carecraft : 2.5%

Total

Comments

Signature

- THIS IS OUR ORDER CONFIRMATION.
- PLEASE REVIEW IT CAREFULLY AND ADVISE US IMMEDIATELY IF THERE ARE ANY DISCREPANCIES.
- NON REPLY CONSTITUTES ACCEPTANCE OF THIS ORDER.
- ABOVE PRICING IS ACCURATE TO THE BEST OF OUR ABILITY.
- HOWEVER, IT IS SUBJECT TO ADJUSTMENT PENDING RECEIPT OF VENDOR INVOICE.

*PLEASE USE THIS **CC961988** NUMBER AS A REFERENCE WITH ANY INQUIRIES REGARDING THIS PURCHASE ORDER.

Quote: 10041988 10-01-2017

them as needed, along with date fields.

Filters

• Dave G

2 fields

Fields

Signature

Initials

Date signed

Text

Drag onto the page, or click to add.

Selected Field

Date signed for Dave G

Width (pt) 110

Height (pt) 24

Remove field

Drag a corner to resize.

Arrow keys move this field, Alt with an arrow key resizes it, and Delete removes it. Hold Shift for steps of ten.

880 Carlsbad Village Dr Suite 202

Carlsbad, CA 92008

(949) 373-3333 Fax (949) 373-3350

Stockurainsb

Member PO#

CC961988

Carecraft PO#

08/11/2026

Received Date

SALES ORDER

ACKNOWLEDGEMENT

VENDOR

AQUASTAR POOL PRODUCTS INC.

PO Special Instructions-

PLEASE CHARGE SALES TAX. IF VENDOR IS UNABLE TO TAX, MEMBER IS RESPONSIBLE.

SHIP TO

WAHOO POOLS GROUP, INC.

6657 US-301 South

Riverview, FL 335783284 US

(813) 699-3282

Member's Order Date: 08/11/2026

Date Received: 08/11/2026

Date Released To Vendor:

Ship Date

Ship Via

FOB Pair

A.S.A.P

Most Economical

Ventura

Quantity	Model #	Description	Unit Price
1	20 ea	PC103	Light Gray Perfect Circle

Product Total

Carecraft : 2.5%

Total

Comments

Signature

Date signed

Text

1. THIS IS OUR ORDER CONFIRMATION.

2. PLEASE REVIEW IT CAREFULLY AND ADVISE US IMMEDIATELY IF THERE ARE ANY DISCREPANCIES.

3. NON REPLY CONSTITUTES ACCEPTANCE OF THIS ORDER.

4. ABOVE PRICING IS ACCURATE TO THE BEST OF OUR ABILITY.

5. HOWEVER, IT IS SUBJECT TO ADJUSTMENT PENDING RECEIPT OF VENDOR INVOICE.

*PLEASE USE THIS CC961988 NUMBER AS A REFERENCE WITH ANY INQUIRIES REGARDING THIS PURCHASE ORDER.

Booked: 10/01/2026 10:51:55 1775

and optionally add a name or label inside the field. Once you are ready,

Saved Filters

Dashboard

Jobs

Leads

Catalog

Contacts

SALES & CLIENT-FACING

Marketing

Scenes

Forms

Financing

BidBuild Connect

BidBuild Marketing

BidBuild Marketplace

FIELD & OPERATIONS

Service Requests

Time Tracking

Inventory/Assets

Map View

COMPANY RESOURCES

Intranet Hub

Documents

Client Announcements

Support

• Dave G

3 fields

Fields

Signature

Initials

Date signed

Text

Drag onto the page, or click to add.

Selected Field

Drag a field to move it, or drag a corner to resize it. Select a field to remove it.

880 Carlsbad Village Dr Suite 202

Carlsbad, CA 92008

(949) 373-3333 Fax (949) 373-3350

Stockurainsb

Me

C

Car

0

Rei

SALES ORDER

ACKNOWLEDGEMENT

VENDOR

AQUASTAR POOL PRODUCTS INC.

PO Special Instructions-

PLEASE CHARGE SALES TAX. IF VENDOR IS UNABLE TO TAX, MEMBER IS RESPONSIBLE.

SHIP TO

WAHOO POOLS GROUP, INC.

6657 US-301 South

Riverview, FL 335783284 US

(813) 699-3282

Member's Order Date: 08/11/2026

Date Received: 08/11/2026

Date Release

Ship Date

Ship Via

FOB Pair

A.S.A.P

Most Economical

Quantity	Model #	Description
1	20 ea	PC103

Product

Carecraft

Comments

Signature

Date signed

Text

1. THIS IS OUR ORDER CONFIRMATION.

2. PLEASE REVIEW IT CAREFULLY AND ADVISE US IMMEDIATELY IF THERE ARE ANY DISCREPANCIES.

3. NON REPLY CONSTITUTES ACCEPTANCE OF THIS ORDER.

4. ABOVE PRICING IS ACCURATE TO THE BEST OF OUR ABILITY.

5. HOWEVER, IT IS SUBJECT TO ADJUSTMENT PENDING RECEIPT OF VENDOR INVOICE.

*PLEASE USE THIS CC961988 NUMBER AS A REFERENCE WITH ANY INQUIRIES REGARDING THIS PURCHASE ORDER.

Booked: 10/01/2026 10:51:55 1775

click **Save and Continue**.

Step 7: Send for Signature

From

Back

GetSalesOrder
Step 3 of 4 — Place fields

Unsaved changes

Previous step

Save and continue

Build Release V2.22.0

See "Whats New!" within your profile

Oct 20, 2026, 9:45 PM CDT

Page 1 of 1

Choose a recipient, then drag a field to where they sign. Each recipient needs at least one signature or initials field.

LACE FIELDS FOR

Dave G 3 fields

FIELDS

- Signature
- Initials
- Date signed
- Text

Drag onto the page, or click to add.

ELECTED FIELD

Drag a field to move it, or drag a corner to resize it. Select a field to remove it.

CARECRAFT

INTERNATIONAL POOL GROUP

880 Carlsbad Village Dr Suite 202

Carlsbad, CA 92008

(949) 373-3333 Fax (949) 373-3350

StockDrains81126

Member PO#

CC961988

Carecraft PO#*

08/11/2026

Received Date

SALES ORDER ACKNOWLEDGEMENT

VENDOR

AQUASTAR POOL PRODUCTS INC.

PO Special Instructions:

PLEASE CHARGE SALES TAX. IF VENDOR IS UNABLE TO TAX, MEMBER IS RESPONSIBLE.

SHIP TO

WAHOO POOLS GROUP, INC.

6657 US-301 South

Riverview, FL 335783284 US

(813) 699-3282

Member's Order Date: 08/11/2026

Date Received: 08/11/2026

Date Released To Vendor: 08/11/2026

Ship Date

Ship Via

FOB Point

A.S.A.P

Most Economical

Ventura, CA

Quantity	Model #	Description	Unit Price	Ext.Price
1	20 ea	PC103	Light Gray Perfect Circle	\$243.54 \$4,870.80

Product Total

\$4,870.80

Carecraft : 2.5%

\$121.77

Total

\$4,992.57

Comments

Signature

Date signed

Notes

On this screen, select **Send for Signature** to send the document out to the designated recipients for signing. Once

Back

GetSalesOrder
Step 4 of 4 — Review and send

✓ Saved as draft

Previous step

Send for signature

Build Release V2.22.0

See "Whats New!" within your profile

Oct 20, 2026, 9:45 PM CDT

Review and send

Each recipient gets their own signing link by email. The link works for 30 days.

Recipients

Edit recipients

Dave G

dave@bidbuild.app

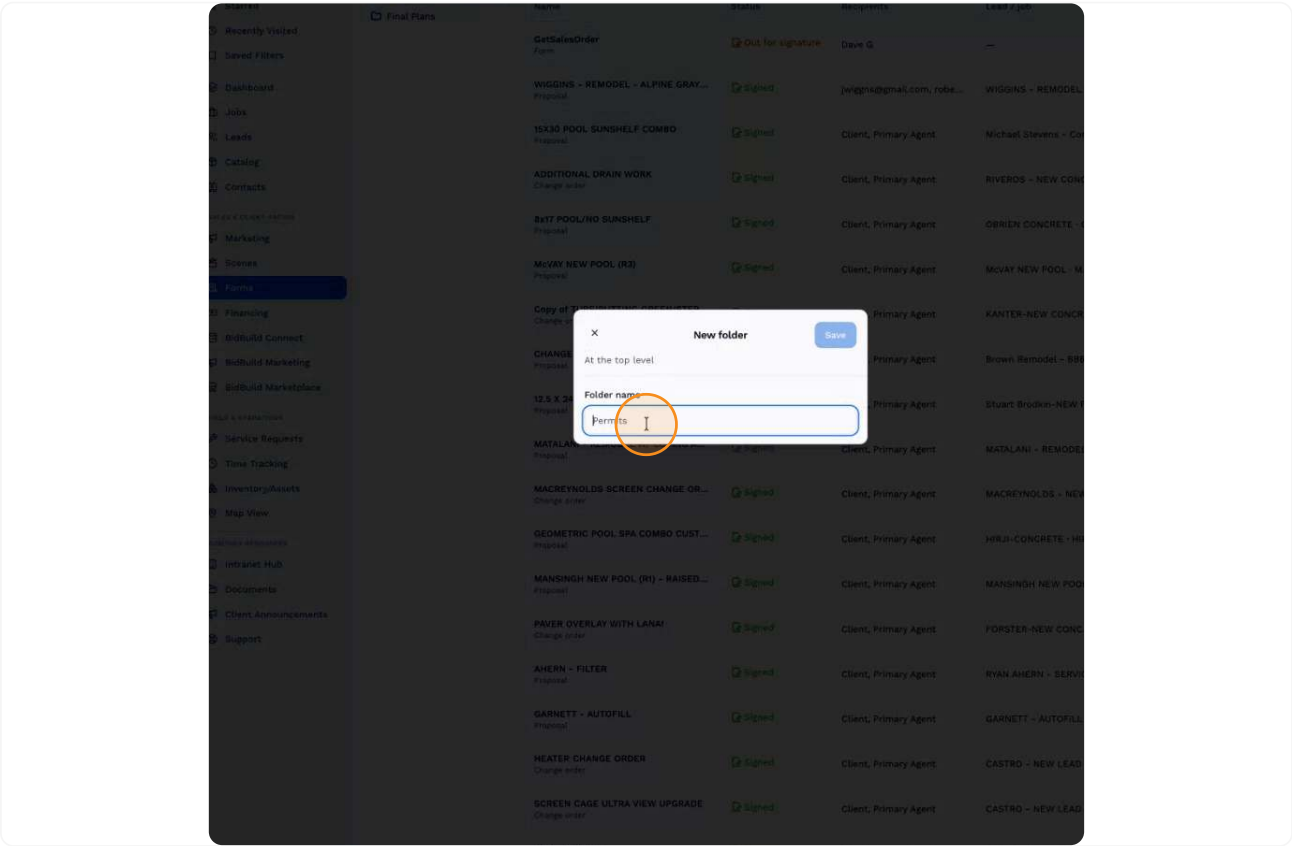
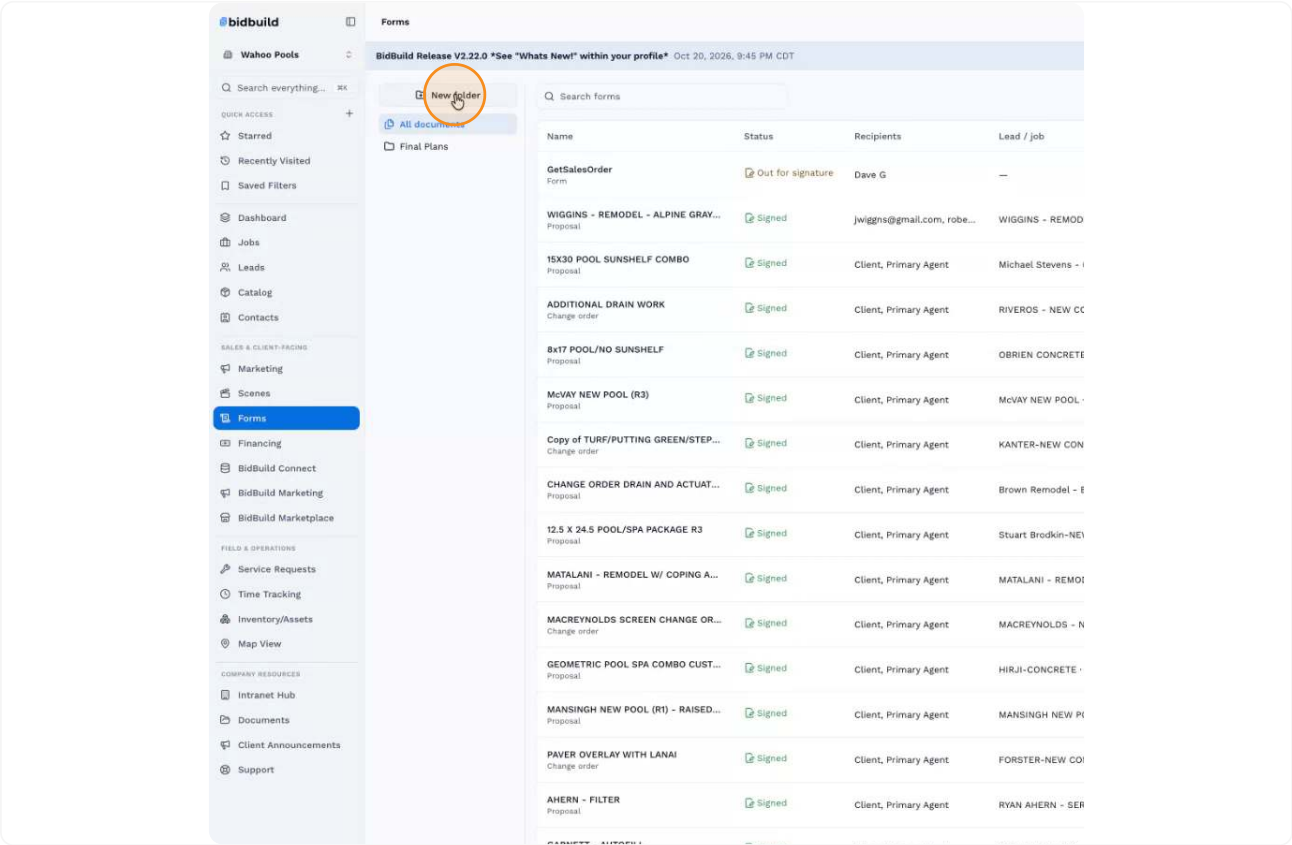
3 fields

Uses 1 of your 89 BidBuild Signatures credits

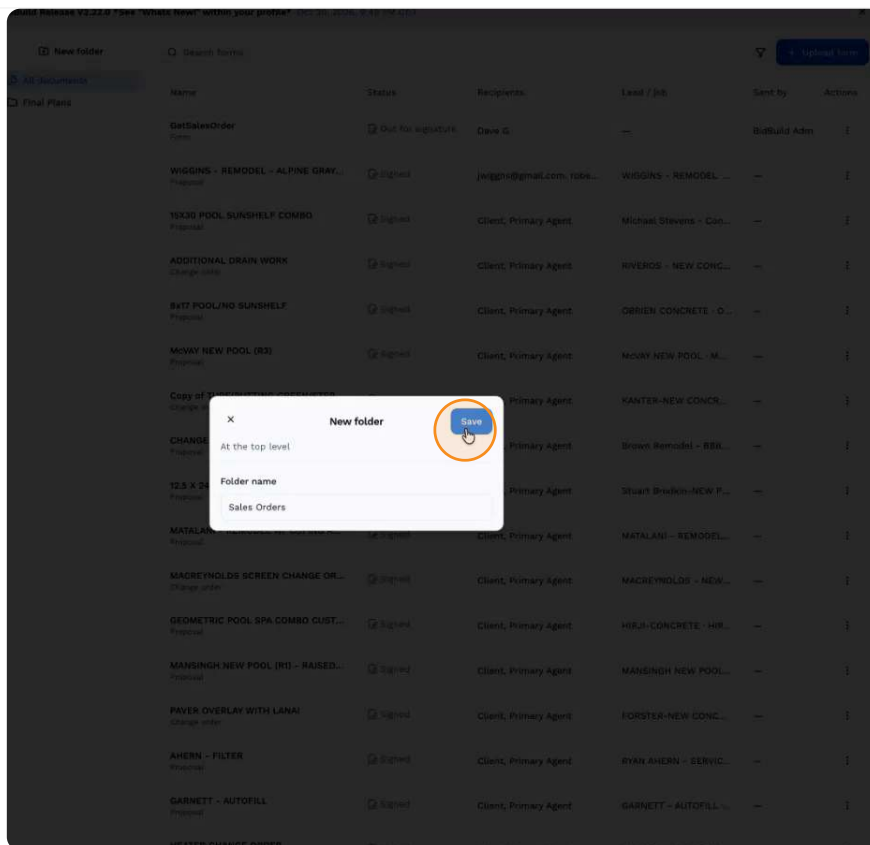
After the document is sent, it will appear in the area labeled **Out for Signature**.

Step 8: Create Folders and Move Items

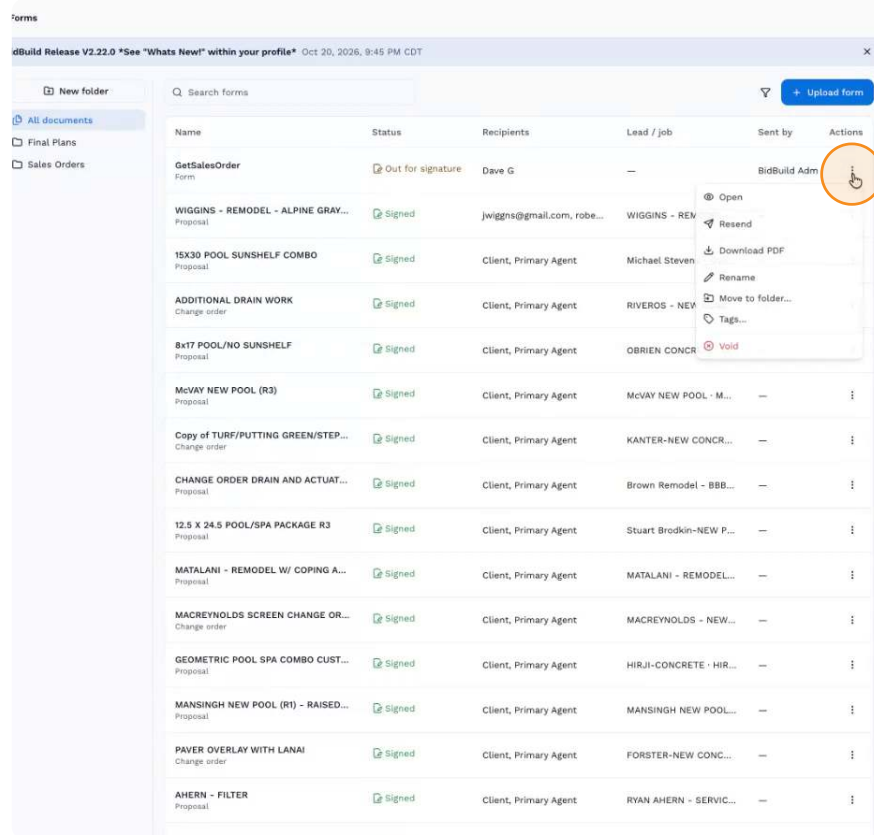
You can organize your files by creating folders. Select **New Folder** to create a folder. Once



a folder is created,



you can move items into that folder.



Now

Forms

Build Release V2.22.0 *See "Whats New!" within your profile* Oct 20, 2026, 8:45 PM CDT

New folder

Search forms

+ Upload form

Name	Status	Recipients	Lead / Job	Sent by	Actions
GetSalesOrder Form	Out for signature	Dave G	—	BidBuild Adm	
WIGGINS - REMODEL - ALPINE GRAY... Proposal	Signed	jwiggins@gmail.com, robe...	WIGGINS - REM...	—	
15X30 POOL SUNSHELF COMBO Proposal	Signed	Client, Primary Agent	Michael Steven	—	
ADDITIONAL DRAIN WORK Change order	Signed	Client, Primary Agent	RIVEROS - NEW	—	
8x17 POOL/NO SUNSHELF Proposal	Signed	Client, Primary Agent	OBRIEN CONC	—	
McVAY NEW POOL (R3) Proposal	Signed	Client, Primary Agent	McVAY NEW POOL - M...	—	
Copy of TURF/PUTTING GREEN/STEP... Change order	Signed	Client, Primary Agent	KANTER-NEW CONC...	—	
CHANGE ORDER DRAIN AND ACTUAT... Proposal	Signed	Client, Primary Agent	Brown Remodel - BBB...	—	
12.5 X 24.5 POOL/SPA PACKAGE R3 Proposal	Signed	Client, Primary Agent	Stuart Brodtkin-NEW P...	—	
MATALANI - REMODEL W/ COPING A... Proposal	Signed	Client, Primary Agent	MATALANI - REMODEL...	—	
MACREYNOLDS SCREEN CHANGE OR... Change order	Signed	Client, Primary Agent	MACREYNOLDS - NEW...	—	
GEOMETRIC POOL SPA COMBO CUST... Proposal	Signed	Client, Primary Agent	HIRJI-CONCRETE · HIR...	—	
MANSINGH NEW POOL (R1) - RAISED... Proposal	Signed	Client, Primary Agent	MANSINGH NEW POOL...	—	
PAVER OVERLAY WITH LANAI Change order	Signed	Client, Primary Agent	FORSTER-NEW CONC...	—	
AHERN - FILTER Proposal	Signed	Client, Primary Agent	RYAN AHERN - SERVIC...	—	
GARNETT - AUTOFILL Proposal	Signed	Client, Primary Agent	GARNETT - AUTOFILL...	—	

Open
Resend
Download PDF
Rename
Move to folder...
Tags...
Void

Build Release V2.22.0 *See "Whats New!" within your profile* Oct 20, 2026, 8:45 PM CDT

New folder

Search forms

+ Upload form

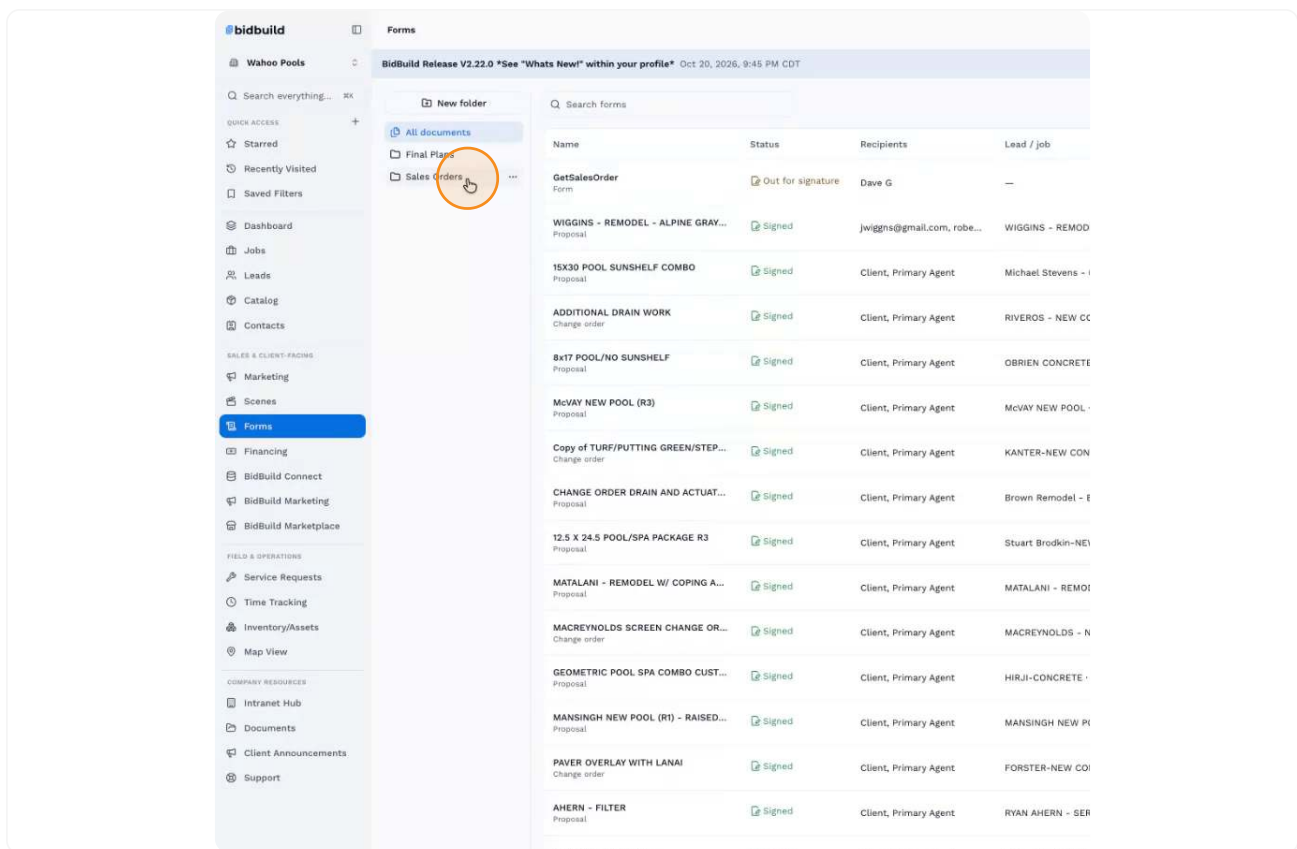
Name	Status	Recipients	Lead / Job	Sent by	Actions
GetSalesOrder Form	Out for signature	Dave G	—	BidBuild Adm	
WIGGINS - REMODEL - ALPINE GRAY... Proposal	Signed	jwiggins@gmail.com, robe...	WIGGINS - REMODEL ...	—	
15X30 POOL SUNSHELF COMBO Proposal	Signed	Client, Primary Agent	Michael Stevens · Cab...	—	
ADDITIONAL DRAIN WORK Change order	Signed	Client, Primary Agent	RIVEROS - NEW CONC...	—	
8x17 POOL/NO SUNSHELF Proposal	Signed	Client, Primary Agent	OBRIEN CONCRETE · O...	—	
McVAY NEW POOL (R3) Proposal	Signed	Client, Primary Agent	McVAY NEW POOL · M...	—	
Copy of TURF/PUTTING GREEN/STEP... Change order	Signed	Client, Primary Agent	KANTER-NEW CONC...	—	
CHANGE ORDER DRAIN AND ACTUAT... Proposal	Signed	Client, Primary Agent	Brown Remodel - BBB...	—	
12.5 X 24.5 POOL/SPA PACKAGE R3 Proposal	Signed	Client, Primary Agent	Stuart Brodtkin-NEW P...	—	
MATALANI - REMODEL W/ COPING A... Proposal	Signed	Client, Primary Agent	MATALANI - REMODEL...	—	
MACREYNOLDS SCREEN CHANGE OR... Change order	Signed	Client, Primary Agent	MACREYNOLDS - NEW...	—	
GEOMETRIC POOL SPA COMBO CUST... Proposal	Signed	Client, Primary Agent	HIRJI-CONCRETE · HIR...	—	
MANSINGH NEW POOL (R1) - RAISED... Proposal	Signed	Client, Primary Agent	MANSINGH NEW POOL...	—	
PAVER OVERLAY WITH LANAI Change order	Signed	Client, Primary Agent	FORSTER-NEW CONC...	—	
AHERN - FILTER Proposal	Signed	Client, Primary Agent	RYAN AHERN - SERVIC...	—	
GARNETT - AUTOFILL Proposal	Signed	Client, Primary Agent	GARNETT - AUTOFILL...	—	
MATER CHANGE ORDER	Signed	Client, Primary Agent	MATER CHANGE ORDER...	—	

X Move document

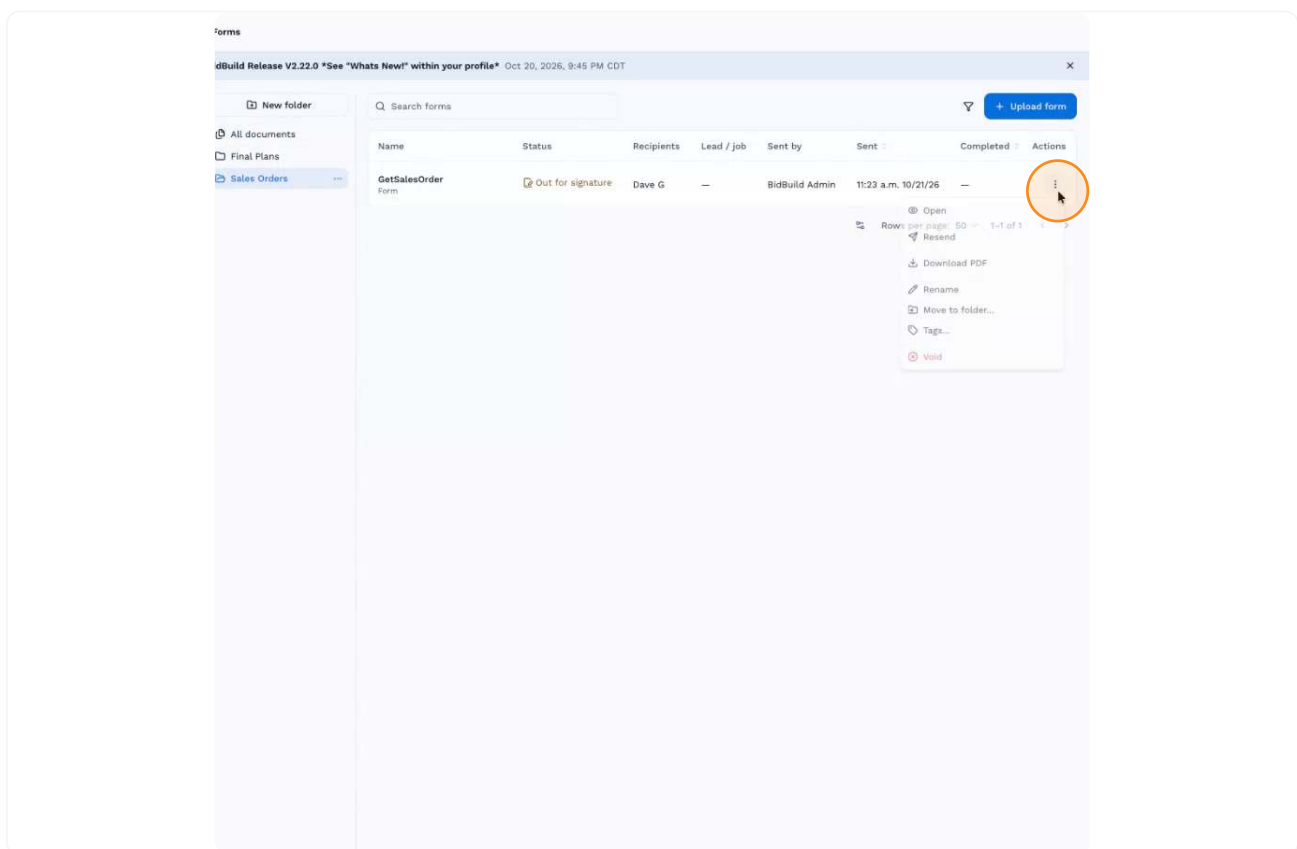
Final Plans
Sales Orders
Unfiled

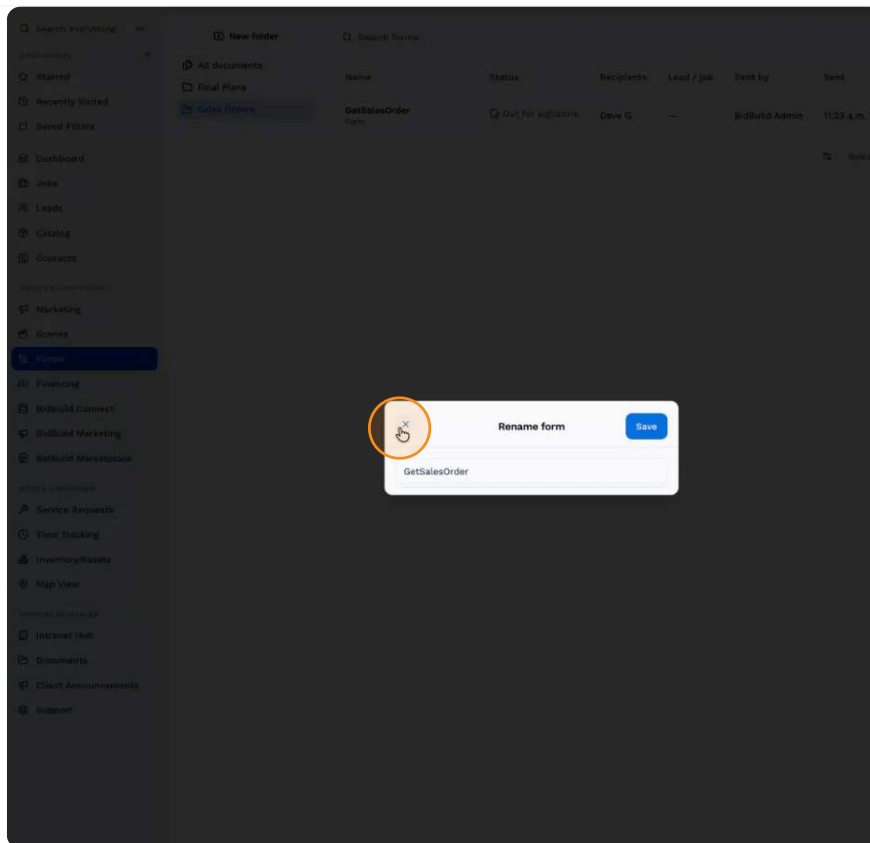
Move

those items will be saved inside the folder.

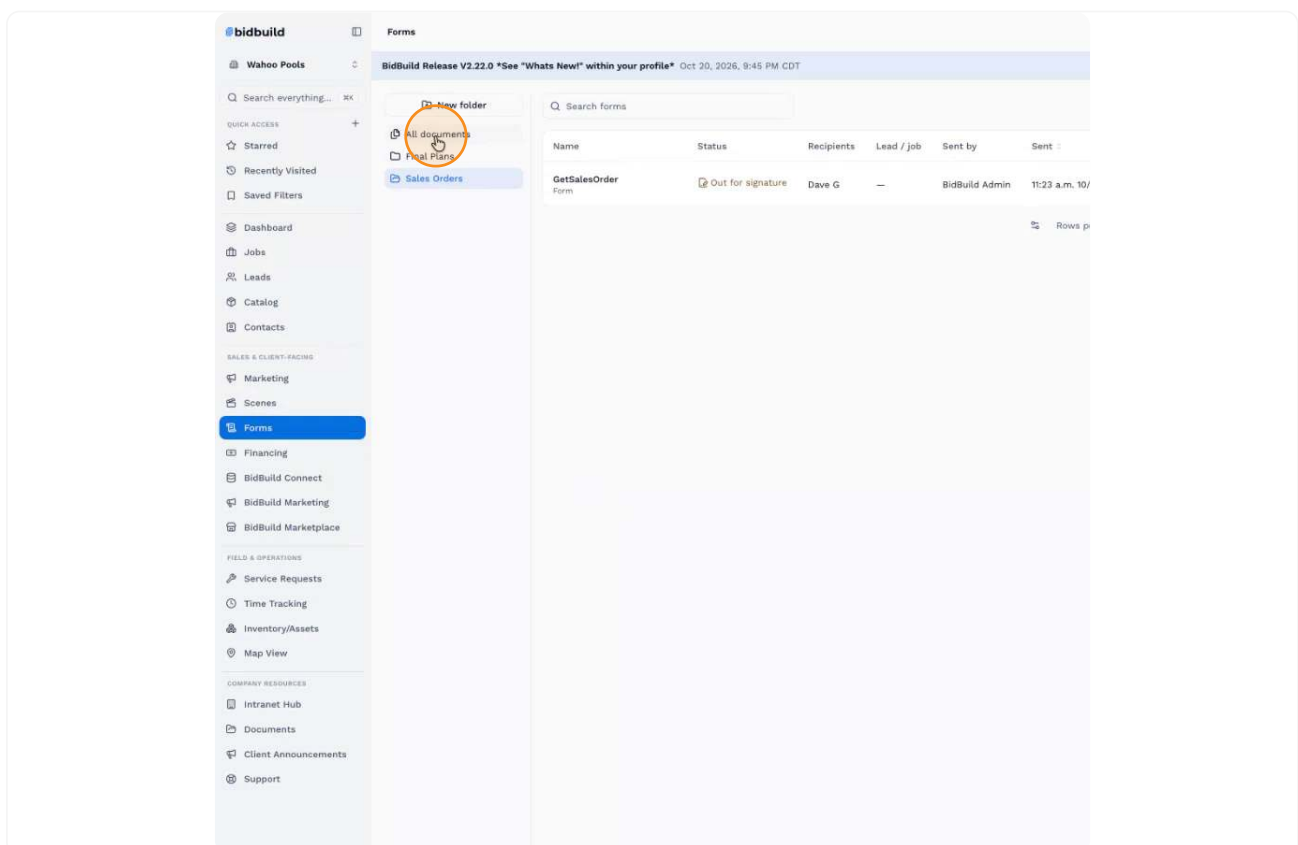


Also,





documents will



be saved if they are configured to be saved against a job or a sales lead.

Step 9: Access Saved Forms from Jobs

In your Jobs section, you'll

see an area

labeled **Forms**. This is where any forms associated with that job or sales lead will be saved and accessible.

Wahoo Pools

Search everything...

QUICK ACCESS

Starred

Recently Visited

Saved Filters

Dashboard

Jobs

Leads

Catalog

Contacts

SALES & CLIENT-FACING

Marketing

Scenes

Forms

Financing

BidBuild Connect

BidBuild Marketing

BidBuild Marketplace

FIELD & OPERATIONS

Service Requests

Time Tracking

Inventory/Assets

Map View

COMPANY RESOURCES

Intranet Hub

Documents

Client Announcements

Support

Jobs > WALMSLEY - 04-26-130

BidBuild Release V2.22.0 *See "Whats New!" within your profile* Oct 20, 2026, 9:45 PM CDT

Quick facts

WALMSLEY - 04-26-130

WALMSLEY-NEW CONCRETE

Created 01:03 p.m. 09/09/26

Overview

Finances

Schedule

To-Do's

Documents

Fields

Selections

Products

Inspections

Work Orders

Time Logs

RFIs

HISTORY

Activities

Logs

Timeline

Pre-Construction

Site Prep

Layout/Dig/Steel

Concrete Shoot

Plumbing

Tile/Coping

Footers

Schedule phases

09/09/26 → 10/06/26 - 28 days

Unscheduled

Accessories 09/09/26

Demo 09/10/26

Electrical 09/11/26

Engineering & Permitting 09/12/26

Equipment 09/13/26

Patio 09/15/26

Plaster 09/16/26

Plumbing 09/17/26

Punch List 09/18/26

Shell 09/19/26

Structures 09/20/26

Footers 10/06/26

Show unscheduled phases (2)

Financial summary

With contingency

Without contingency

Contract value

\$172,800.00

No change orders

Budget cost

\$138,178.71

\$122,659.29 to complete

Profit (with contingency)

\$34,621.29

20% margin (profit + contract value)

Comp

11%

\$5,761

Billed to client

\$60,480.00 of \$172,800.00

Spent against budget

35% collected

\$112,320.00 outstanding

\$114,262.26 committed in POs

Client information

John WALMSLEY

+18139577192

JOSH1287@AOL.COM

4401 Winding River Dr, Valrico, FL

Secondary Contact

No name

Job details

Type

Start Date

Division

Board

JOE

Project Manager

To Thomas Olguin

Secondary Managers

Mitch Buckley

Tara Greene

Elizabeth Cacace

David Evans

Custom Fields

HC-BLD-26-0086685

Wahoo Pools

Search everything...

QUICK ACCESS

Starred

Recently Visited

Saved Filters

Dashboard

Jobs

Leads

Catalog

Contacts

SALES & CLIENT-FACING

Marketing

Scenes

Forms

Financing

BidBuild Connect

BidBuild Marketing

BidBuild Marketplace

FIELD & OPERATIONS

Service Requests

Time Tracking

Inventory/Assets

Map View

COMPANY RESOURCES

Intranet Hub

Documents

Client Announcements

Support

Jobs > WALMSLEY - 04-26-130

BidBuild Release V2.22.0 *See "Whats New!" within your profile* Oct 20, 2026, 9:45 PM CDT

Quick facts

Overview

Finances

Schedule

To-Do's

Documents

Forms

Fields

Selections

Products

Inspections

Work Orders

Time Logs

RFIs

HISTORY

Activities

Logs

Timeline

Forms

Forms linked to this job, and its proposals and change orders sent for signature.

Q Search forms

Table with 6 columns: Name, Status, Recipients, Lead / job, Sent by, Sent

Row 1: R&R Pool Proposal, Signed, Client, Co-Client +1, WALMSLEY-NEW CON..., 11:21 p.m. 10

Rows per page