CONSTELLATION❶

Constellation1 eSign Online User Guide

Constellation1 eSignature offers a simple, user-friendly interface that is accessible anywhere you are. Create signing sessions, email those documents for eSignatures, and get confirmations fast!

Contents

Log into Constellation1 eSignature

Each implementation of eSignature is created in a secure environment that is specific to your company. Your company will provide the website URL to log into.

Use your email address and temporary password to login. Once logged in, review and accept the Terms & Conditions, then reset your password.

Dashboard

The dashboard is a snapshot of your signing sessions and a way to quickly access the sessions needing attention.
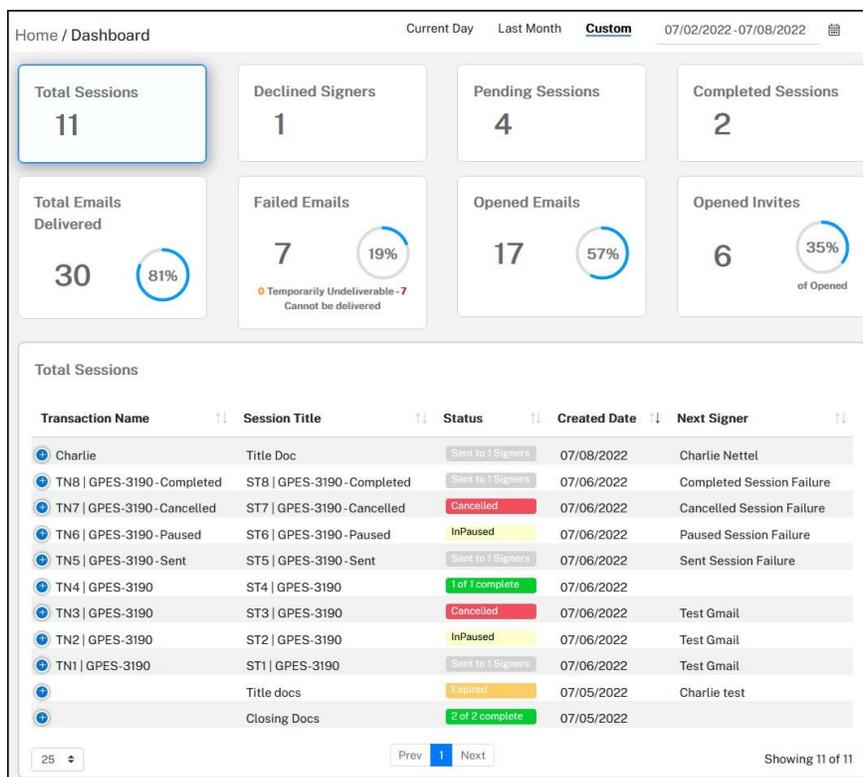
Set a date range to filter the results. Date range options are,

- Current day
- Last month
- Custom
  - o Select the date range on the calendar.

To filter the list further, click on any one of the eight tiles to view the sessions that correspond to the tile. The tiles are,

- Total Sessions – Total number of signing sessions sent for the defined date range.
- Declined Sessions – Number of sessions declined by a signer.
- Pending Sessions – Number of sessions that are pending signatures.
- Completed Sessions – Number of completed sessions.
- Total Emails Delivered – Number and percentage of emails successfully delivered.
- Failed Emails – Number and percentage of emails not delivered. Bounced emails.
- Opened Emails – Number and percentage of emails opened.
- Opened Invites - Number and percentage of invites opened.

In the results listed, click on the blue dot with the plus sign or click the Transaction Name to show more details related to the session. Depending on the status, the options will very. See more details regarding each option in the Session / Home section of this document.
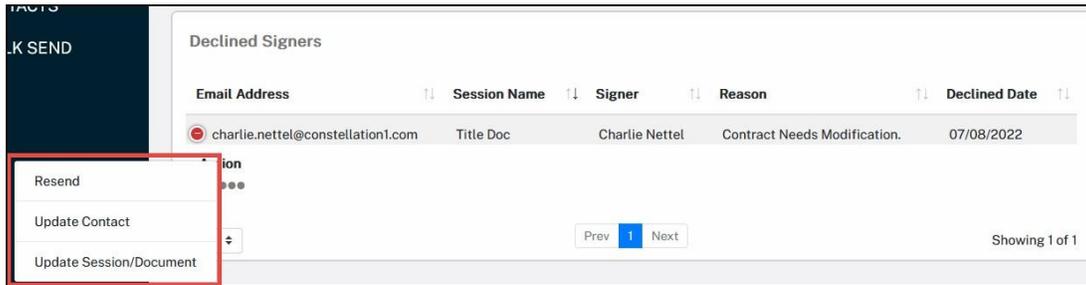

Show are results for Total Sessions

Two sections that may be the most helpful are Declined Signers and Failed Emails

Declined Signers

Sub-menu options available for Declined Signers are,

- Resend – Resends the session invite.
- Update Contact – Opens the contact record to edit the contact information.
- Update Session/Documents – Opens the signing session in edit mode.

Failed Emails

When an email fails to be delivered, a reason will be given. In the Actions menu, the sender has the options,

- Send SMS – Opens a popup modal to send an SMS text message.

- Remove from Blacklist – Updates our email server to remove the email address from the blacklist.
  - This option is only available one time per email address.

Note: See more details regarding each option in the Session / Home section of this document.

Home / Sessions Page

When logging in, you will be taken to the Home / Sessions page. This page displays previously created eSignature sessions with the Title, Status and the creation Date of the session.

There are five statuses, they are

- Draft – A signing session is being created and has not been sent to selected signers.
- Sent – An active signing session with its documents has been sent to signers.
- Paused – An active signing session is in edit mode and is being edited. Signers are not able to sign their documents until the session has been sent again.
- Completed – Documents have been signed by all signers.
- Cancelled - Signing session has been cancelled by the sender.

| Home / Sessions					
Transaction Name	**Session Title**	**Status**	**Created Date**	**Next Signer**	**Actions**
123 Main St	123 Main St	Paused	06/24/2022	Charlie Nettel	•••
123 Main St	Title Docs	Draft	06/23/2022	Charlie Nettel	•••
123 Main St	Title Docs	Sent	05/20/2022	Charlie Nettel	•••
Inspection docs	Inspection docs	Completed	05/17/2022		•••
Closing Docs	Closing Docs	Cancelled	04/08/2022	Mary Choo	•••

In the top right corner, there is a funnel icon. Click the funnel icon to filter the sessions by Transaction name, Session Title, Status or Date Range.

The Actions column may contain a combination of the following options, depending on the status of the signature session.

- View – Displays the Session Information page.
- Cancel – Allows the sender to stop and cancel the signing session.
- Copy – Creates a copy of the signing session.
- Edit – Pauses a session that has been sent and allows the sender to edit it.
- Delete – The sender can delete a session only if it's in the Draft status.
- Continue – The sender can continue creating the signing session that has been paused or is in draft mode.

Create a Signing Session

Using our 3-step process, it's easy to create and send a signing session. On the Home/Sessions page, click the Add+ button.

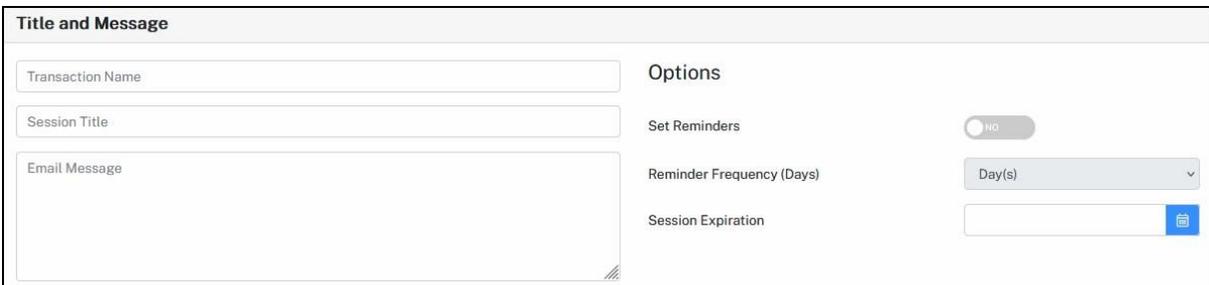| Home / Sessions		▼
Search by Transaction name or Session title	🔍	Add +
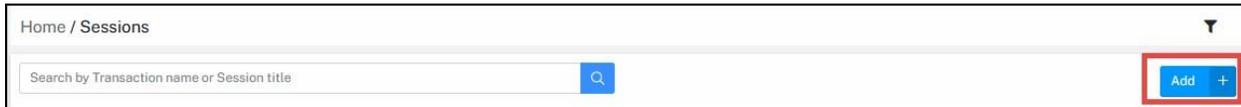
Step 1

Setup a signing session, add recipients, configure authentication, and add documents to your session.

Title and Messages:

Give your session a name and title. A message can be added that will be sent to the signers.

Enable Reminders as needed. Email reminders can be sent to signers on a regular basis from once a day to once every 30 days, until they complete their signing session.

Set an expiration date if needed. When a signing session expires the session will not be available to signers. The session will show as canceled.

Title and Message

Transaction Name		Options	
Session Title		Set Reminders	NO
Email Message		Reminder Frequency (Days)	Day(s)
		Session Expiration	📅

Recipients:

The sender can add multiple recipients to the session. There are three recipient roles. They can be summarized as:

- Signer – A signer must sign, initial, date or add additional information to the document as needed to complete their signing session.
- Reviewer – A reviewer can view the session documents but does not have any signer tags.
- CC Recipient – A CC Recipient receives a copy of the completed documents once the signing session has been completed.

When adding recipients to a session, the sender has the following options,

Recipient Ordering - Set the order of who should sign first, second and so forth. When Recipient Ordering is enabled, recipients will receive their signing session invite emails in sequential order, only after the pervious person has completed their signing session.

Use the numbers dropdown to the left of the recipient's name, to set the signing order.

If recipient ordering is off, all recipients will receive their session invite emails simultaneously.

Recipients

Recipient Ordering	YES	Include me as a Signer	YES	ⓘ Show signing groups	NO		
Recipient Sequence	**Name**	**Email**		**Status**		**Type**	**Actions**
1 ⌄	Mary Choo	mchoo@email.com		Pending Invite		Signer ▾	•••
2 ⌄	Charlie Nettel	Charlie.Nettel@constellation1.com		Pending Invite		Reviewer ▾	•••
3 ⌄	Doug Nettel	douglas.nettel@gmail.com		Pending Invite		Signer ▾	•••
4 ⌄	Mary Smith	charlien63@gmail.com		Pending Invite		CC-Recipient ▾	•••

to add new recipient type 3 or more characters

Include Me as a Signer – The sender can also add themselves as a signer to the signing session. When enabled, the sender will automatically be added as a signer to the session.

When the signing session is sent and depending on the signing order, the sender may be asked if they would like to sign now or later.

Show Signing Groups – Signing groups allow any one person who is part of a group to sign on behalf of the group. Enable this option to show the Signing Groups column.

In the signing groups column, enter the name of the group. The group name must be an exact match for the system to include everyone on the group.

Recipients

Recipient Ordering	NO	Include me as a Signer	YES	ⓘ Show signing groups	YES		
Recipient Sequence	**Name**	**Email**	**Status**	**Signing Group**		**Type**	**Actions**
1 ⌄	Mary Choo	mchoo@email.com	Pending Invite	Group1		Signer ▾	•••
1 ⌄	Doug Nettel	douglas.nettel@gmail.com	Pending Invite	Group1		Signer ▾	•••
1 ⌄	Mary Smith	charlien63@gmail.com	Pending Invite	Group2		Signer ▾	•••
1 ⌄	Charlie Nettel	Charlie.Nettel@constellation1.com	Pending Invite	Group2		Signer ▾	•••

This example shows two groups. Group1 and Group2

To add recipients, the sender can search for contacts that have previously been added to the system. Entering a portion of the recipient's name or email address will display filtered results in the auto suggest box. Click on the person(s) who should be included in the signing session.
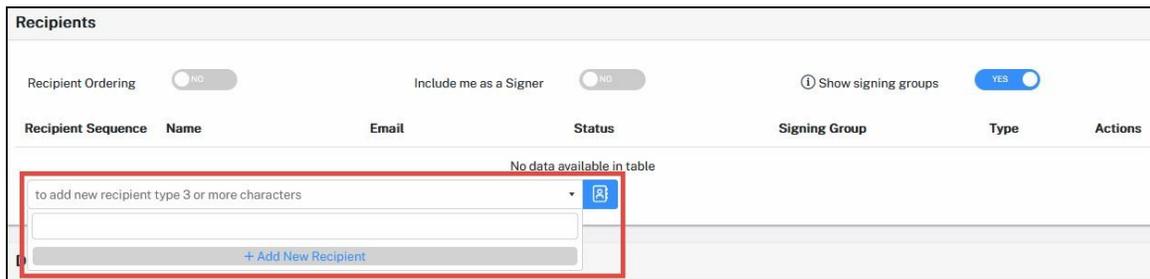
Senders can also use the Address Book icon or select to Add a New Recipient.

New signers can be added when the signing session is created. Click the +Add New Recipient text in the recipient search box. A pop-up screen will open.

At a minimum, enter the recipient's First name, Last name, and Email address. Click Save to add them to the session. They will also be saved as a contact and available for future signing sessions.

When adding or editing recipients, the sender can personalize signer options for each recipient. They include,

Authentication – The sender can add additional authentication methods to each signer. The available authentication methods include:

- Pin – Assign a unique pin to access the signing ceremony.
- SMS - Sends signers a one-time unique password codes via text message. Standard text message rates apply.
- KBA (Knowledge Base Authentication) - This type of authentication is an identity validation method to authenticate a signer by asking random questions selected from public and commercial information related exclusively to the signer. KBA is $1/signer.

Allow Delegation – Allows the signer to delegate their signature session to another person.

Sign In-Person – Allows the signer to sign in the in the presents of the sender or other authorized witness. This option is an electronic signature, not a wet signature.

Disable Edit Name – Disables the ability for the signer to edit their name during the signing session.

Include Attachments – Sends completed documents as an email attachment.

Document Review – Requires the signer to scroll through all documents before being prompted to sign.
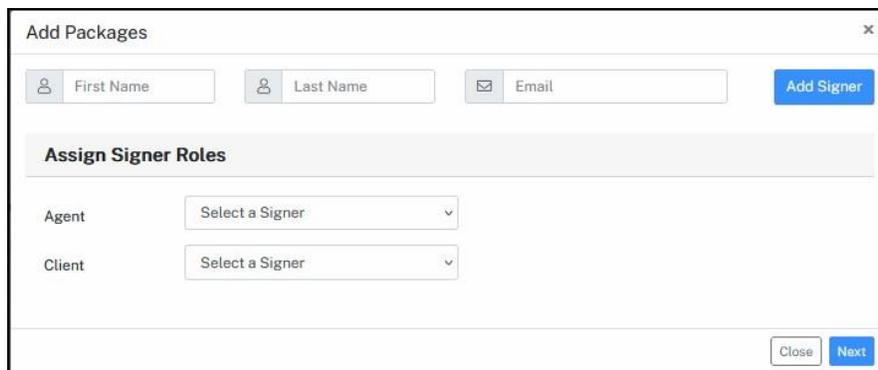
Documents:
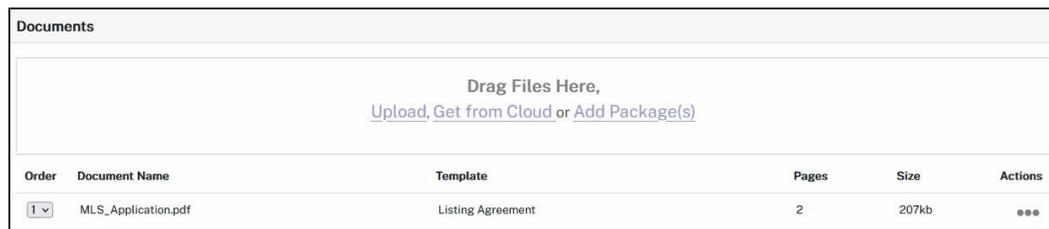
Documents					
		Drag Files Here,			
		Upload, Get from Cloud or Add Package(s)			
Order	Document Name	Template	Pages	Size	Actions
1 ⌄	MLS_Application.pdf	Listing Agreement	2	207kb	•••

There are four options available when adding documents to a signature session. They are:

- Drag and drop your documents to the documents section.
- Upload – From your computer or local drive, navigate to the document(s) then select them.
- Get from Cloud – Select from OneDrive, Dropbox or box, then navigate to the documents and select them.
- Add Package(s) – In the pop-up modal, navigate to the package or template and select it and click Next. Then assign signers to a role.

Note: See the Template and Packages section below for more details.

Add Packages			✕
⌂ First Name	⌂ Last Name	✉ Email	**Add Signer**
Assign Signer Roles			
Agent	Select a Signer ⌄		
Client	Select a Signer ⌄		
			Close Next

In the Action menu next to each document, you have the following options,

- Rename – Give the document a different name.
- Delete – Remove the document from the signing session.
- Clear Template – Removes any template that may exist on the document.
    - In the case where the document is in the system as a template but and you need to remove the template for this signing session.
- Apply Template – Adds a template to the document.
    - In the case where you are importing a document through our API and need to apply a template.
- Read Tags – The system will scan the document for anchor tags and signing locations.
    - For more details, https://docs.constellation1.com/anchor-tags/

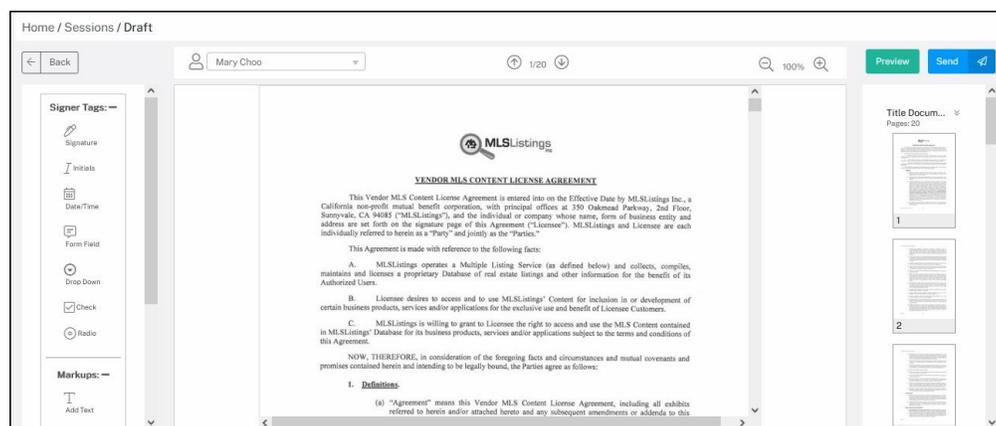eSignature supports the following document types,

- PDF
- Word
- RTF
- Excel
- PNG
- HTML

Documents must not exceed 25MB each. Total documents per signing session, must not exceed 50MB.

Once Step 1 is complete, click the Next button in the top right corner to move to Step 2.

Step 2

Add signer tags and markups to the documents.

In the left rail, drag and drop signer tags onto the document. Signer tags are items where the signer may need to add their signature, initials or supply additional information.

Signer Tags include:

- Signature – Signer will add their signature.
- Initials – Signer will add their initials.
- Date/Time – Signer will add the date and time.
- Form Field – Signer may need to add additional text.
- Drop Down – Signer may need to select an option from the drop down.
- Check – Place a check mark on your document.
- Radio – Signer may need to select a radio button.

Signer tags are added for each signer. Select the signer from the dropdown above the document. A minimum of one signer tag needs to be placed on the document for each signer.
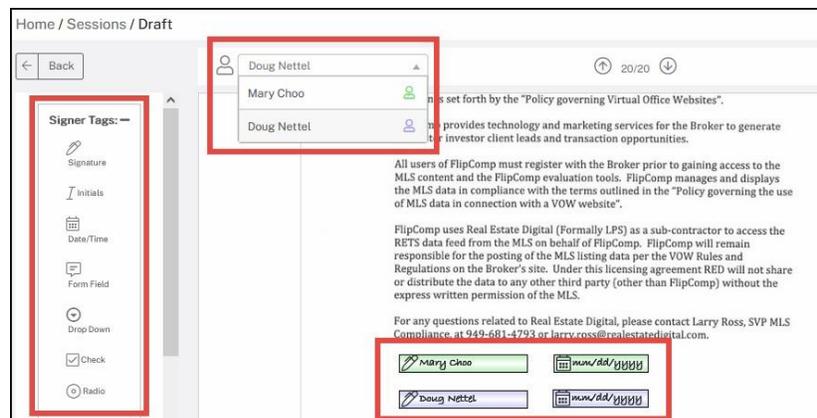

The sender can modify the document by adding markups. Drag and drop markups onto the document as needed.

Markups include:

- Add Text – A text box can be placed on the document. The sender can add text to the document.
- Strikethrough – A red line can be placed over text on the document.
- Underline – A blue line can be placed under the desired text.
- Highlight – A yellow overlay can be placed over the selected text.
- Check Mark – A blue checkmark allows the sender to select an item on the document.

Some markups are adjustable or editable. For example, the Strikethrough can be extended to cover an entire line of text. The corner of the Add Text box can be dragged out to make the box larger or click the gear icon on the markup to open the edit box.
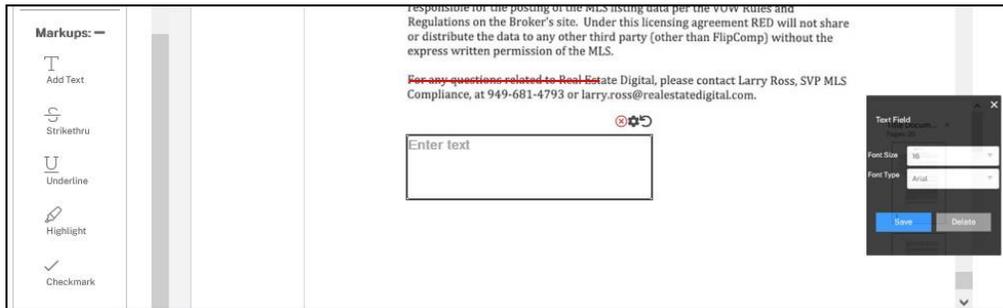
When the documents have all the necessary signer tags and markups, the sender can either Preview the session and the documents or Send the session to the recipients.

Step 3

This step is optional. It allows the sender to preview their session before sending it.
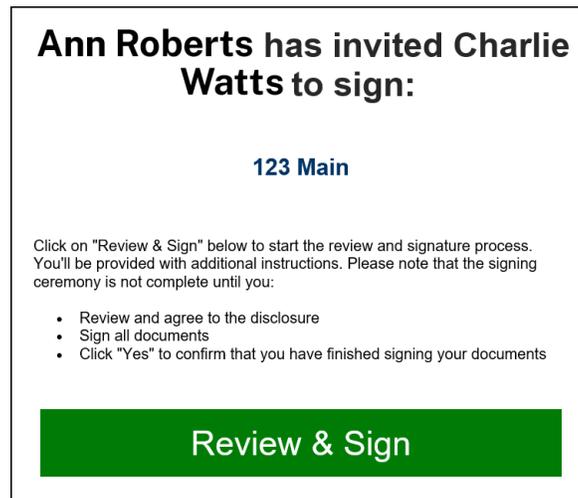
This page is divided into four sections:

- Signing Session Information
- Documents
- Recipients
- Signer Tags

The sender can click Back to make changes to the session or click Send to send the session.
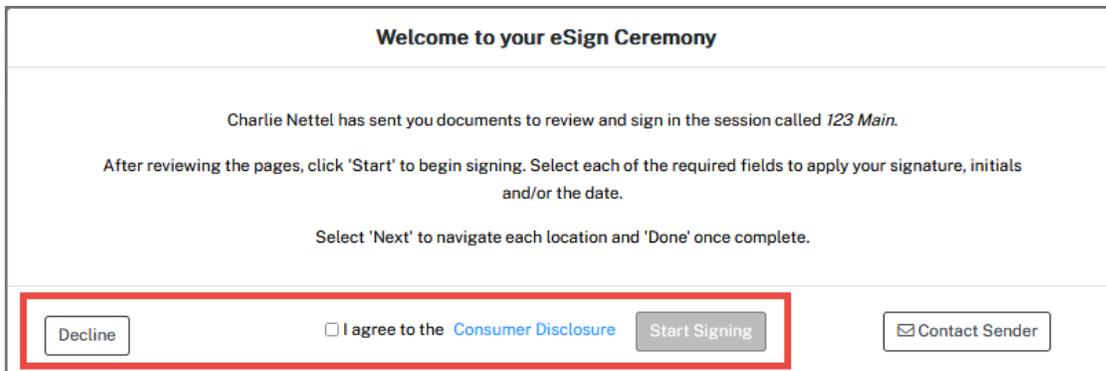
Signing Ceremony

When a signing session is sent, the recipients will receive an email inviting them to sign. The email will contain a link to Review & Sign. Clicking Review & Sign will grant them access to their signing session.

Ann Roberts has invited Charlie Watts to sign:

123 Main

Click on "Review & Sign" below to start the review and signature process. You'll be provided with additional instructions. Please note that the signing ceremony is not complete until you:

- Review and agree to the disclosure
- Sign all documents
- Click "Yes" to confirm that you have finished signing your documents

Review & Sign

Signers will be prompted to accept the Consumer Disclosure before they can begin to sign.

Welcome to your eSign Ceremony

Charlie Nettel has sent you documents to review and sign in the session called *123 Main*.

After reviewing the pages, click 'Start' to begin signing. Select each of the required fields to apply your signature, initials and/or the date.

Select 'Next' to navigate each location and 'Done' once complete.

Decline   □ I agree to the Consumer Disclosure   Start Signing   ☑ Contact Sender

Click the I Agree box, then click Start Signing to enter the signing session.

In the signing session, the signer may have the options to Upload Documents, Edit their Signature, Decline Singing or Contact the Sender.

⤒ Upload Document   ✎ Edit Signature   ⊘ Decline Signing   ☑ Contact Sender

Click Start and use the Next button to navigate through the tags within the document.
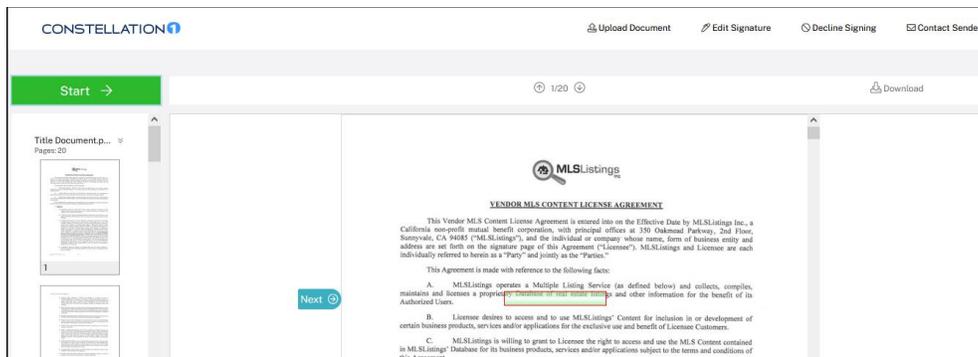
When all tags have been completed, select Done in the top left corner to complete the signing session.

An email will be sent to the session sender notifying them that the signature session has been completed. The signer can then download a copy of their signed document.

Session Status and Information

The Signing Session Information page allows the sender to view the session details. To access the Status / Information page, click the three dots in the Action menu next to the signing session, then click View.
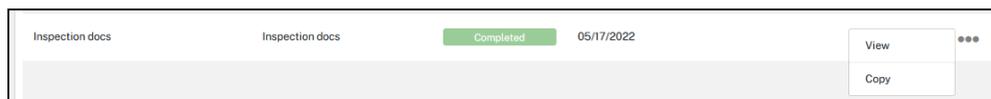
The session information page is sorted into 4 sections:

- Signing Session Information:
    - Transaction Name
    - Session Title
    - Email Message
    - Created, Modified and Expiration Dates
    - Current Session Status
    - Certificate of authenticity download

- Documents
    - Document name
    - Options to view and download

Documents						Download all: 🗎 zip or 🖨 PDF
Order	Document Name	Template		Pages	Size	Actions
1 ⌄	Roof Inspection.pdf			19	91kb	•••

- Recipients, those who were included in the signing session.
    - Name
    - Email address
    - Authentication Method
    - Role
    - Status

Recipients							
Recipient Sequence	First Name	Last Name	Email Address	Authentication	Role	Status	Actions
1 ⌄	Mary	Choo	mchoo@email.com		Signer	Invited	•••
1 ⌄	Charlie	Nettel	Charlie.Nettel@constellation1.com		Signer	Completed	•••

- History, shows a timestamp of all session events, such as adding markups, signers agreeing to the disclosure, authentication method and other important details related to the signing session.
    - Action Date
    - IP Address
    - Description

History			
Action Date	IP Address	Description	Actions
6/29/2022 12:13:13 PM PDT	24.56.240.28	Signing Completed by Charlie Nettel (Charlie.Nettel@constellation1.com)	•••
6/29/2022 12:10:34 PM PDT	24.56.240.28	Signature created and disclosure approved by Charlie Nettel (Charlie.Nettel@constellation1.com)	
6/29/2022 11:58:49 AM PDT	24.56.240.28	Invitation sent to Charlie Nettel(Charlie.Nettel@constellation1.com) by Charlie Nettel	
6/29/2022 11:58:49 AM PDT	24.56.240.28	Invitation sent to Mary Choo(mchoo@email.com) by Charlie Nettel	
6/29/2022 11:58:48 AM PDT	24.56.240.28	eSignOnline Session Created by Charlie Nettel	
6/29/2022 11:57:36 AM PDT	24.56.240.28	Session edited by: Charlie Nettel	
6/29/2022 11:36:56 AM PDT	24.56.240.28	Invitation sent to Mary Choo(mchoo@email.com) by Charlie Nettel	
6/29/2022 11:36:56 AM PDT	24.56.240.28	Document Title Document.pdf has been marked up by Charlie Nettel	
6/29/2022 11:36:53 AM PDT	24.56.240.28	eSignOnline Session Created by Charlie Nettel	

Templates

Create Templates for commonly used documents sent using eSignature. Markups and signer tags will be saved on the document as a template. Templated documents can be sent individually or added to a Package.

Home / Templates

Group ⇅	Template Name ⇅	Description ⇅	TemplateType ⇅	Document Link	Signers	Pages	Modified ⇅	Actions
	Listing Agreement		User Template	api connects to ...	6	2	07/01/2022	●●●
	Closing Document		User Template	Closing Docume...	2	20	07/01/2022	●●●

Search by Template name, description, group or document link 🔍   Add +

25 ⬍   Prev 1 Next   Showing 2 of 2

To create a template, click on the Add+ button.

Enter a name in the Template Draft field.

Enter a description as needed.

In the Document Link field enter your document code. The system will access the document by the code number then apply the template. This field is designed for enterprise customers and is dependent on our API to connect to custom documents.

Home / Template / Template draft

Cancel   Save

Documents

Template draft   Description

Document Link

Drag Files Here,
Upload, Get from Cloud

Document Name	Pages	Size	Actions
No data available in table			

Signer role(s)   + Add Role

Roles	Actions
No data available in table	

Upload your document. There are three options when adding a document to a template. The available options are:

- Drag and drop your documents to the documents section.
- Upload – From your computer or local drive, navigate to the document(s) then select them.
- Get from Cloud – Select from OneDrive, Dropbox or box, then navigate to the documents and select them.

Next, add the signer roles.

Pro Tip: *Add the maximum number of signer roles that are appropriate for the document. It's easier to remove unnecessary tags when creating a signing session.*

Click the +Add Role button and in the pop-up modal select the signer roles, and click the Select button.
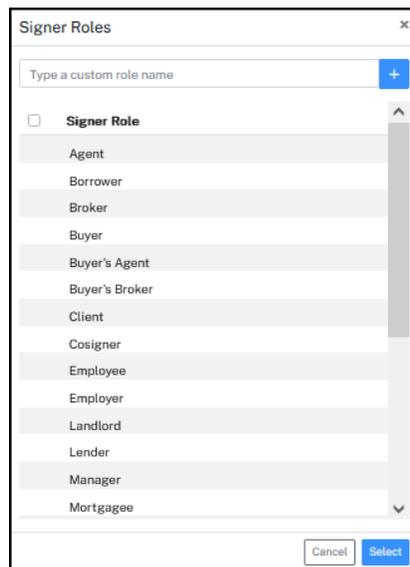
When the signer roles have been added, the document will show in the section below. Add the signer tags and markups as needed. Be sure to add a signer tag for every role included in the template.
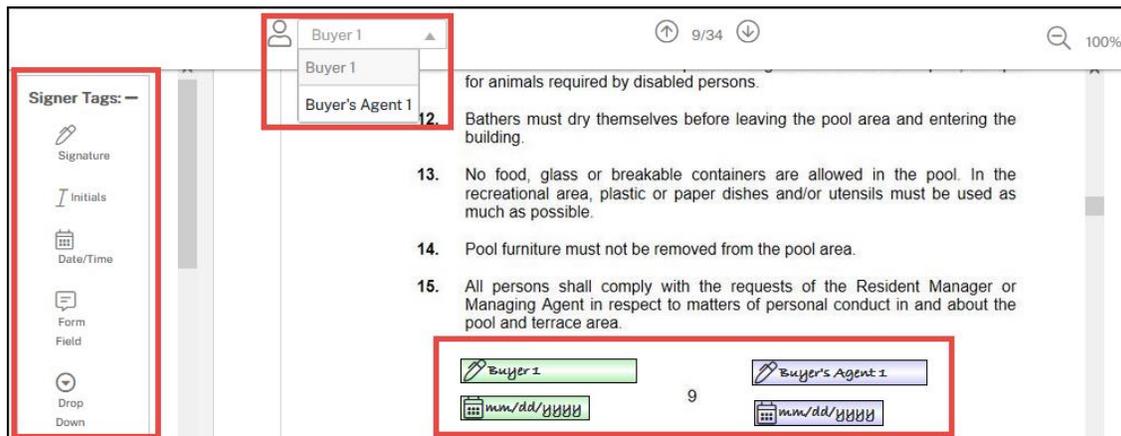
This is similar to Step 2 when creating a signing session.

When your template has been configured, click Save in the top right corner.

Packages

Multiple templates can be brought together into a Package. A group of documents that are normally signed together can be included in a single package.
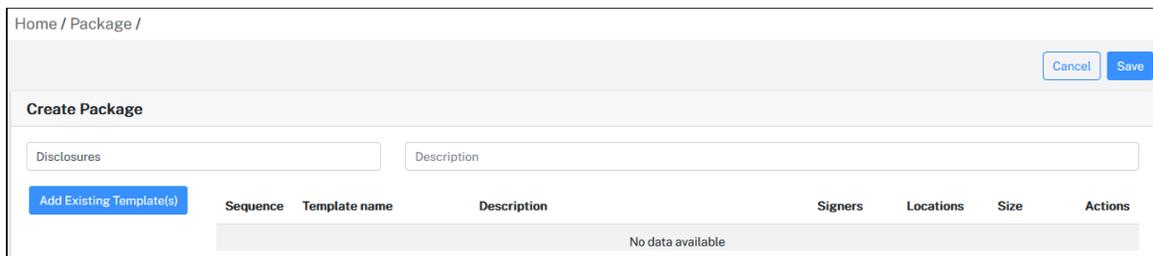
To create a package,

Enter a name in the Template Draft field.

Enter a description as needed.

Click the Add Existing Template(s) button. In the pop-up modal, select the templates to be included in the package.
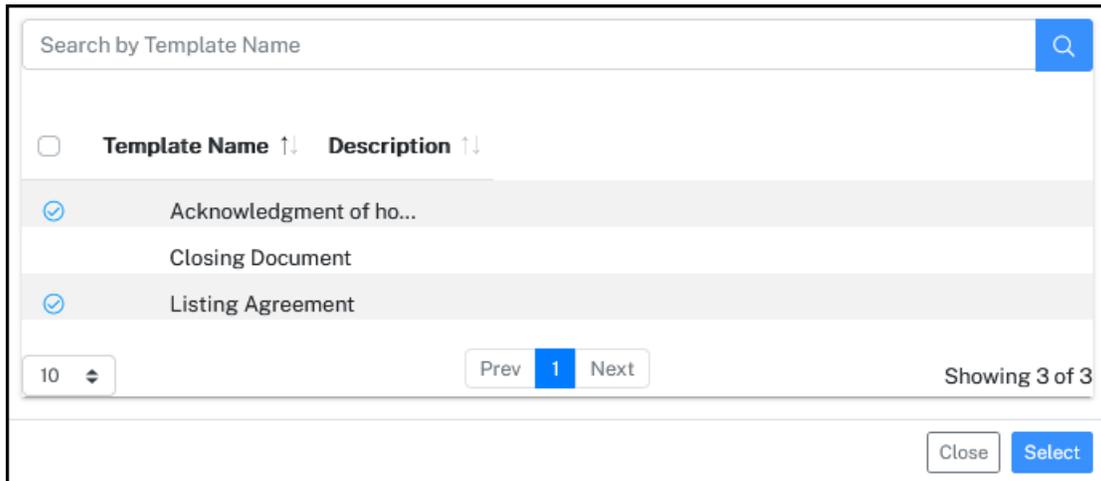
Then click the Select button.

Then click Save in the top right corner.

Create a Signing Session Using Packages.

There are some differences in the workflow when creating a signing session that incorporates templates or packages. The difference is how documents are added to a signing session.

To begin, create a session as you normally would. Be sure to add recipients before adding a package.

See "Create a Signing Session" above.

When it comes time to add documents to the session, click on Add Package(s).
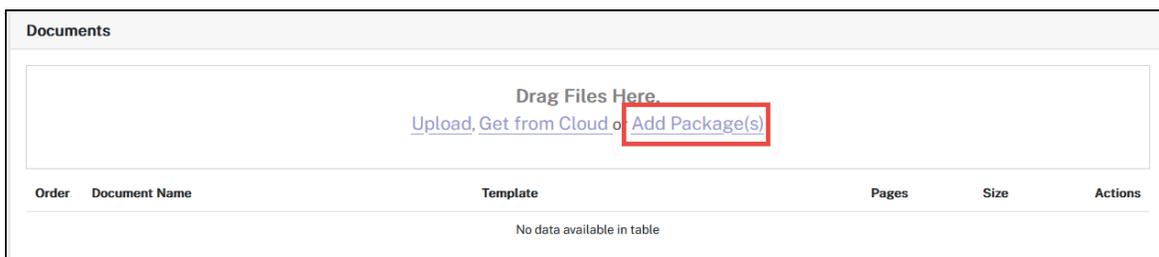
In the pop-up modal, navigate to and select the package(s) to be added to the signing session, then click Next.
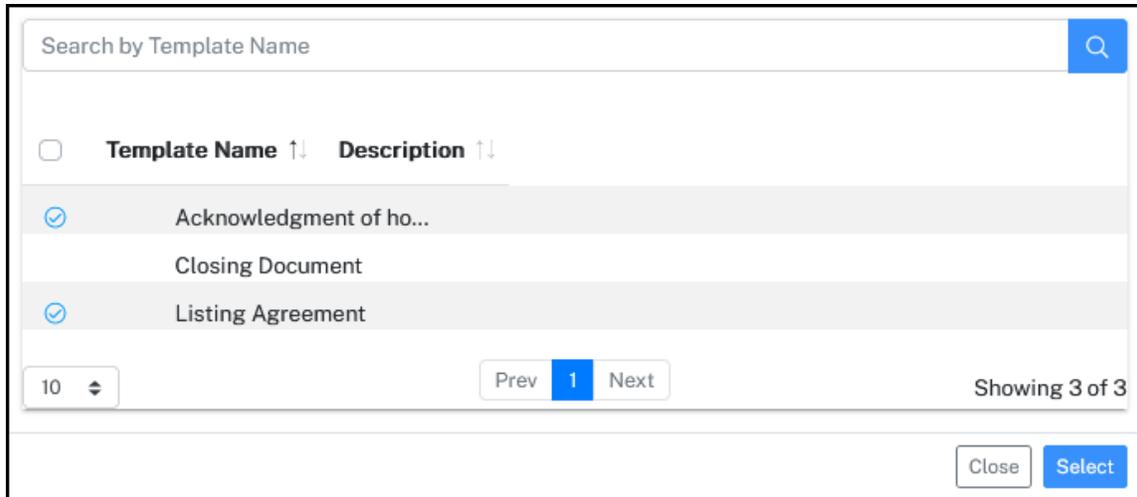
Then, select the signers by their title, and click Next.

Pro Tip: Add recipients to the session before adding templates or packages.

Because signer tags have already been added to the document the system just needs to know who signs where.
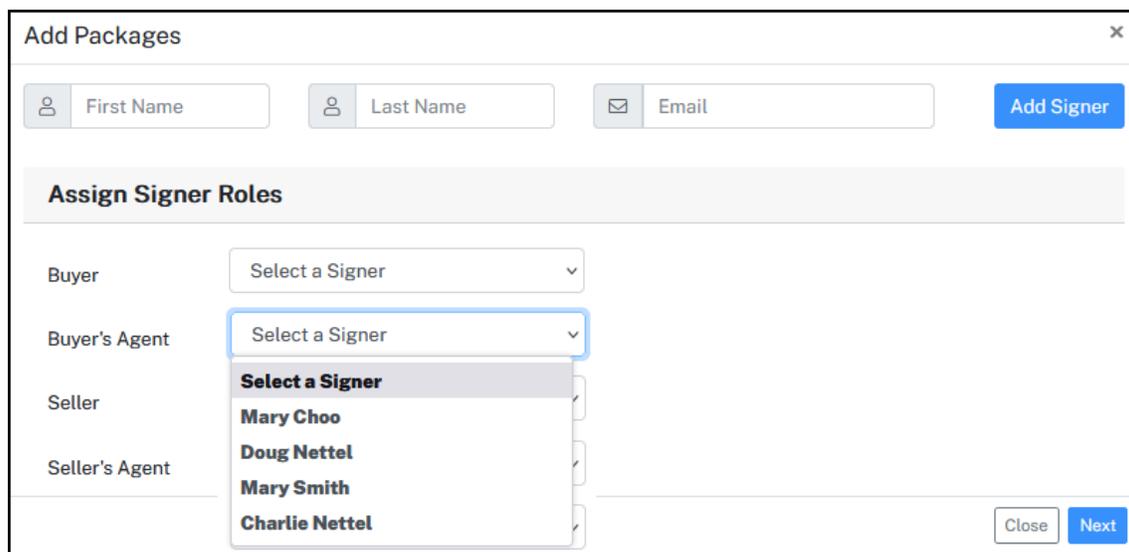
Click Next.

If there are more signer tags than there are signers, you will presented with the following message,
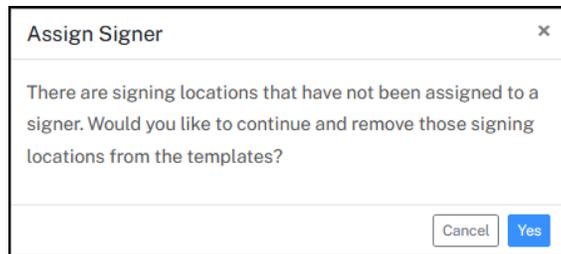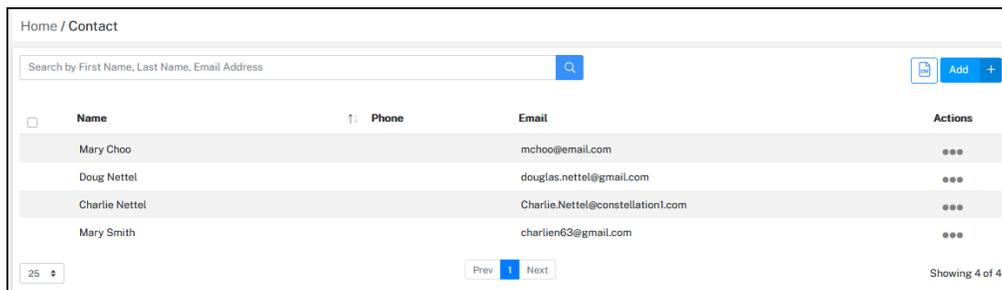

Click Yes, to have the extra signer tags removed from the document for this signing session.

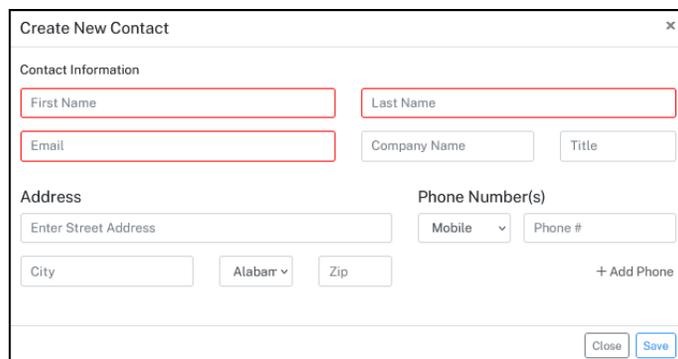You're now ready to move on to Step 2. See "Create a Signing Session" above.

Contacts

Adding contacts to eSignature is an easy way to manage people who are regularly included in signing sessions.

To add a contact, click the Add+ button.

On the Create New Contact form enter the contacts information.

To edit or delete a contact, click on the ellipsis in the action column.

Bulk Send

Bulk send allows you to create multiple signing sessions all at one time. An example of this would be if there is an updated company policy and need everyone to acknowledge the change. A signing session will be created for each recipient independent of the other recipients.

To begin, create a session as you normally do. See "Create a Signing Session" above.

Give your session a name and title. Include an email message that will be sent to all recipients.

The difference with Bulk Send is how recipients are added to the session. There are three options for adding recipients. They are:

Add from your contacts. This is the same workflow that is defined in the Create a Signing Session.

Upload a CSV file (Comma Separated Values) from your local computer or local drive or from the cloud. Navigate to the file and select it. The recipients will be added to the session.
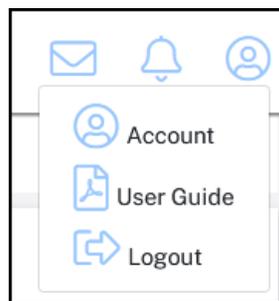
Add the needed documents to the session.

You're now ready to move on to Step 2. See "Create a Signing Session" above.

Profile

Manage account details, notifications, attachments, and your signature.

Click on the Profile icon in the top right corner to access your account information, view a user guide or logout.

Note: You will automatically be logged out when you close the browser window.

Profile

Click on Account to access your Profile information. Account information that can be updated include,

- User's name
- Company
- Job Title
- Phone
- Photo
- Password
- Email address
- Time zone

Home / Profile

First Name: Charlie	Last Name: Nettel		Password: xxxxxxxxxxxxx
Replace Photo Company: Constellation1	Job Title:		Email / Username: Charlie.Nettel@constellation1.com
Phone:	Mobile:		Time Zone: Date Format:
			Pacific Standard Time

Click the pencil icon to edit each section.

Email Notifications

Decide what events or actions you would like to be notified.

Email Notifications

Session State

Session Started — NO   Session Viewed — YES   Session Signed — YES

Session Delegate Notice — YES   Session Declined — NO

Session Invites

Session Reminder Summary — YES

Session Expiration

Session Expiring — YES   Session Expired — YES

Session Documents

Session Documents — YES

Toggle on or off each option as desired.

Attachments

When a signing session is complete, the signed documents will automatically be sent as an attachment to the sender. This feature is only available to upgraded accounts.

Signatures

Add or edit your signature as it should appear on any documents you may sign.

There are two options when creating a signature. Similar to the signing session, you can select a (font) Style or draw (write) your signature.

When you're satisfied with your signature, click the Update Signature button to save it to the system.

Billing

eSignature can be provided to enterprise companies or to individuals.

Individual account holders can use the Billing page to manage payment information, view billing history, view subscriptions and view invoices.

Home / Billing

Payment Information

Please select a plan and enter billing information

Active Plan: | Gold (Unlimited sessions/month) ▾ |

Update Preferences

☐ Use existing card

Subscription: ○ $20/month
○ $15/month when paid annually ($180/year)

| First Name | Last Name | 📇 Credit Card Number |

| Address Line 1 | | MM/YY 📅 | Security Code |

| Address Line 2 |

| City | Select State ▾ | Zip | United States▾ |

Billing History

License Details

eSign Plan	Session Per Month	Sessions This Month	KBA Credits
Gold	Unlimited	3	0

Active Subscriptions

Description	Price	Next Bill Date
There is not active subscriptions		

Invoices

↑↓ Invoice Number	Date	Amount	Status
No data available			

25 ▴▾   Prev   Next   No records available

If you have any questions regarding the changes noted or need additional assistance, please reach out to your Account Manager or contact support at eSignSupport@realestatedigital.com .

For information on other Constellation1 solutions, visit our website at www.constellation1.com