



Document Template Planner

Map each document's fields to your CRM, so every signature updates your records automatically.

FREE WORKSHEET

Grey rows are examples. Add one row per field group for every document you send repeatedly.

Document	Signer	Fields on the document	CRM field it feeds	What it should trigger
Buyer NDA	Buyer	Name, email, phone	First name, last name, email, phone	Data room access; add to buyer lists
Buyer NDA	Buyer	Industry, area, price range	Buyer criteria fields	Dynamic email lists update
Buyer NDA	Buyer	Proof of funds amount	Liquid capital	Buyer qualified flag
Listing agreement	Seller	Asking price, commission, term	Listing price, fee, expiry date	Listing created; expiry reminder
LOI	Buyer	Offer price, deposit, closing date	Offer amount, deposit, target close	Deal stage moves to LOI

Documents to plan

- ☐ Buyer registration / NDA
- ☐ Engagement or listing agreement
- ☐ Letter of intent
- ☐ Co-brokerage agreement
- ☐ Seller questionnaire or disclosure

When your plan is done

- ☐ Build each template once
- ☐ Link every field to its CRM field
- ☐ Test with a colleague
- ☐ Send from the contact record with one button

With Vertica Sign, each mapped field is saved on the signed PDF and in the CRM at the same time. Full article: "A DocuSign Alternative for Business Brokers" at businessbrokerscrm.com.