

# Forms

Forms are reusable templates for signature requests that can automatically fill in details from the transaction, define who needs to sign, and identify what information they need to enter. They give your team a consistent, efficient starting point for your most frequently signed documents.

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## Introduction

Forms make it easy for you and your team to send signature requests for the docs that need to be signed most often. Instead of starting from scratch each time, use a ready-made template built for your most common workflows.

Forms are created using PDFs from your shared Reference Library. They include everything you need up front; signer roles, autofilled transaction info, custom text, signature fields, and more.

When it's time to send, just pick the right form, confirm the details, and send it off. Optionally, you can even add or update any information if needed.

This saves time, reduces mistakes, and gives everyone a smoother, more consistent signing experience.

## How It Works

### Admins Create the Form

From the shared Reference Library, master admins can turn PDFs into reusable forms by choosing a doc, identifying signers, and placing fields exactly where they belong.

Once created, a form becomes a reliable template your team can use again and again for fast, accurate signature requests.

### Smart Signer Selection

Admins can set up forms with all possible signers, but each sender can choose which signers to include when sending the request.

### Team Members Prepare and Send

When it's time to send a request, a team member selects the right form, confirm the details, and fills in any deal-specific info. All fields can be edited, so it's easy for the sender to make changes to

fit each situation on the fly.

## Signers Review and Sign

Signers get a secure link with just the fields they need to fill out. It's a smooth, straightforward experience that works on any device.

## Create a Form

Turn a Reference doc into a structured, reusable form with the key fields and transaction information already in place for senders and signers.

**Who Can Do This:** Master admins whose company is subscribed to Pipeline eSign.

To create a Form:

- 1 Go to Your Reference Library**
  - Click [Reference] from the top menu.
- 2 Choose a Doc to Convert to a Form**
  - Find the PDF doc you want to turn into a form.
  - Click the gear next to it and select [Convert to Form].
- 3 Select a Signer**
  - Choose the role of someone who will always sign this form using the **Signers** dropdown in the right menu.



The screenshot shows a web interface for creating a form. At the top, there's a 'Doc Name' field containing 'Listing Agreement' and buttons for 'Cancel' and 'Save Form'. The main content area displays the text of an 'EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT'. The text includes sections for 'I. The Parties', 'Seller', and 'Agency', each with blank lines for input. On the right side, there is a 'Signers' dropdown menu. The dropdown is open, showing a list of roles: 'seller' (selected), 'listing agent', 'listing agent 2', 'seller 2', 'buying agent', 'buying agent 2', 'buyer', 'buyer 2', 'escrow officer', 'mortgage', 'outside listing agent', and 'title'. Below the dropdown, there are several input fields with labels: 'Close Date', 'MLS Number', 'Listing Date', 'Expiration Date', and 'Acceptance Date'. A red arrow points to the 'Signers' dropdown menu.

**Start with the primary signer** – someone who always signs, like the *Seller* or *Buyer*. This keeps the form organized and fields tied to the right roles.

#### 4 Add Fields to Set the Form Structure

- Drag the necessary fields from the *Fields* section on the right, and drop them onto the doc on the left (outlined below).

### Autofilled Transaction Info

Insert **Transaction Info** fields to automatically pull key details directly from the transaction, like *Transaction Name*, *Listing Date*, and *Buyer Name(s)*.

*Transaction Info* can be entered by the admin and / or sender. If the information is missing at time of sending, the sender will be required to enter it.

The screenshot shows a form editor interface. On the left is a document titled "EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT". The document text includes "I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on \_\_\_\_\_, 20\_\_\_\_, is between:" followed by fields for "Seller:" and "Agency:". On the right is a "Fields" panel with a list of field types: Signing Date, Full Name, Company, Text, Checkbox, Doc Text, Transaction Name, Close Date, MLS Number, Listing Date, Expiration Date, Acceptance Date, List Price, Sale Price, Buyer Name(s), and Seller Name(s). A red box highlights the last seven items, and a red arrow points from the "Transaction Name" field in the panel to the document text.

### Document Text

Insert **Document Text** for any standard text that should appear every time the form is used, like brokerage name, company details, or any required legal language.

*Document Text* can be entered by the admin and / or sender. If the information is missing at time of sending, the sender will be required to enter it.

## Signer Fields

Insert fields the signer is responsible for completing: **Signature**, **Initials**, and **Signing Date**.

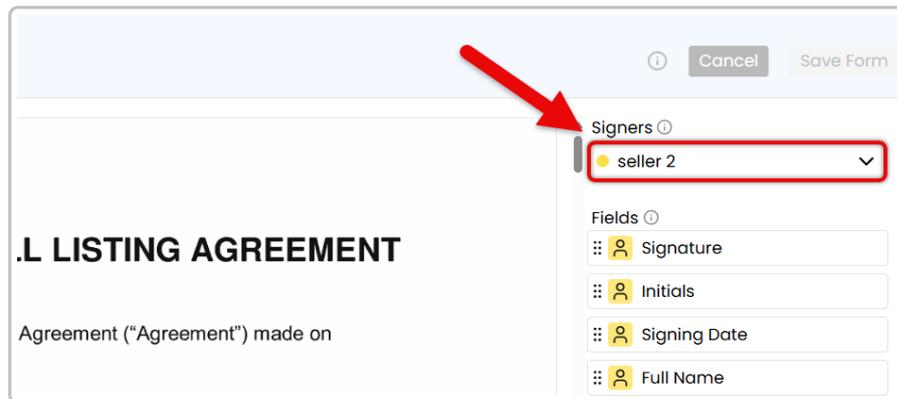
## Flexible Fields

Insert flexible fields that can be completed by either the sender or signer, depending on who has the information.

- Add **Full Name** and **Company** fields to automatically pull the signer's details directly from the transaction.
- Add a **Text** field when you need a flexible space that either the sender or signer can fill in with custom information.
- Add a **Checkbox** field whenever it will be needed on the form.

## 5 Add Additional Signers & Place Their Fields

- Use the *Signers* dropdown to add each signer role, one at a time.
- Place only the fields that apply to the selected signer.



REAL ESTATE LISTING AGREEMENT

Agreement ("Agreement") made on

Signers

seller 2

Fields

- Signature
- Initials
- Signing Date
- Full Name

Fields are color-coded to match each signer, making it easy to see which fields belong to the signer currently selected in the dropdown.

## 6 Save the Form

- Once the form is finalized, click [Save Form]. Your team can now use the form as a consistent starting point for signature requests.

## Edit a Form

Edit a Form to update signers, fields, or content, so your team always sends the most accurate, up-to-date version.

**Who Can Do This:** Master admins whose company is subscribed to Pipeline eSign.

To make changes to a Form:

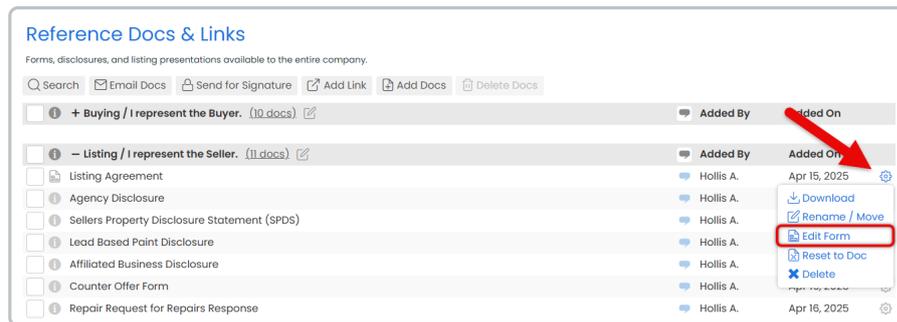
### 1 Go to Your Reference Library

- Click [Reference] from the top menu.

### 2 Choose a Doc to Edit

- Find the Reference Form you want to make changes to.

- Click the gear next to it, then select [Edit Form].



### 3 Update & Save the Form

- Make your desired updates to the form.
- Click [Save Form].

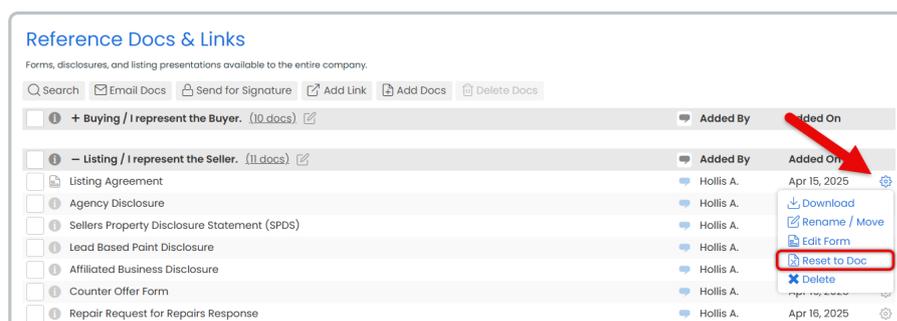
## Reset a Form

Reset a Form to clear signers and fields, restoring it to the original doc for a fresh start.

**Who Can Do This:** Master admins whose company is subscribed to Pipeline eSign.

To reset a Form:

- 1 **Go to Your Reference Library**
  - Click [Reference] from the top menu.
- 2 **Choose the Doc to Reset**
  - Find the Form you want to clear and reset.
  - Click the gear next to it, then select [Reset to Doc].



### 3 Confirm

- Click [Clear] to confirm you want to reset the form back to the original doc.

## Send Signature Requests

[Learn how to Send Signature Requests](#)