# Reference Forms

Reference Forms are reusable templates for signature requests created from Reference Docs with signer roles and fields already in place. They give your team a faster, more consistent way to request signatures without starting from scratch.

## Introduction

Reference Forms are reusable templates created from PDFs in your team's shared Reference Library. They give your team a consistent, structured starting point for sending signature requests without rebuilding from scratch every time.

Think of them as the digital version of a well-prepared form: organized, repeatable, and easy to customize for each deal.

Created by admins, each Reference Form includes pre-defined signer roles along with pre-placed fields for signatures, initials, dates, and transaction details. All fields remain editable, so senders can make updates as needed before sending.

Admins can include all possible signer roles when creating the form. When a request is sent, only the relevant signers are included, keeping the process focused and clean.

Team members choose a form, personalize it with deal-specific info, and send. This saves time, reduces errors, and gives the sender confidence that nothing important is missed.

Signers only see the fields assigned to them, making the experience clear and simple.

Reference Forms help your team move faster, stay consistent, and keep every signature request on track.

## How It Works

#### Admins Create the Form

Admins build Reference Forms from PDFs in the shared Reference Library, adding signer roles and key fields like signatures, dates, and transaction info. Once saved, the form becomes a reusable template for the whole team.

#### Team Members Prepare and Send

Admins and agents choose a form, fill in the deal-specific details, and send. The structure is set, they just handle the details.

#### Signers Review and Sign

Signers get a secure link with only the fields they need to complete. The process is clear, fast, and works on any device.

## Create a Reference Form

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

**Who Can Do This**: Master Admins.

To create a Reference Form:

### Go to Your Reference Library

- Click [Reference] from the top menu.

### Choose a Doc to Convert

- Find the PDF doc you want to turn into a form.
- Click the gear next to it and select [Convert to Form].

### Select a Signer

- Click the *Signers* dropdown and choose the role of someone who will always sign this form.


**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.

### Add Fields to Set the Form Structure

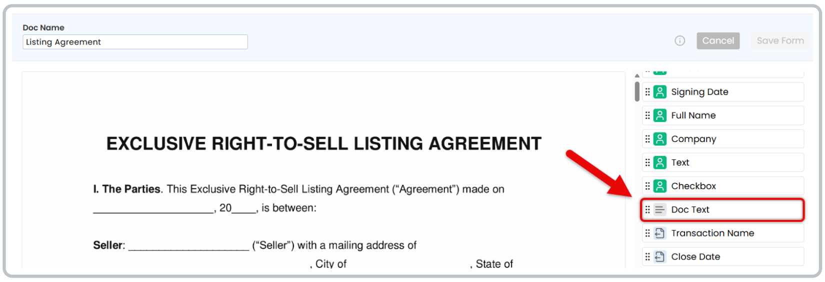
- Drag and drop your desired fields onto the doc, starting with those that should always be included in every signature request (outlined below).

Autofilled Transaction Info

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

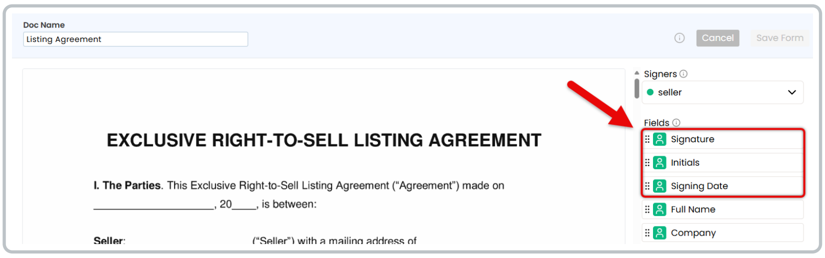

Document Text

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




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 at the time.

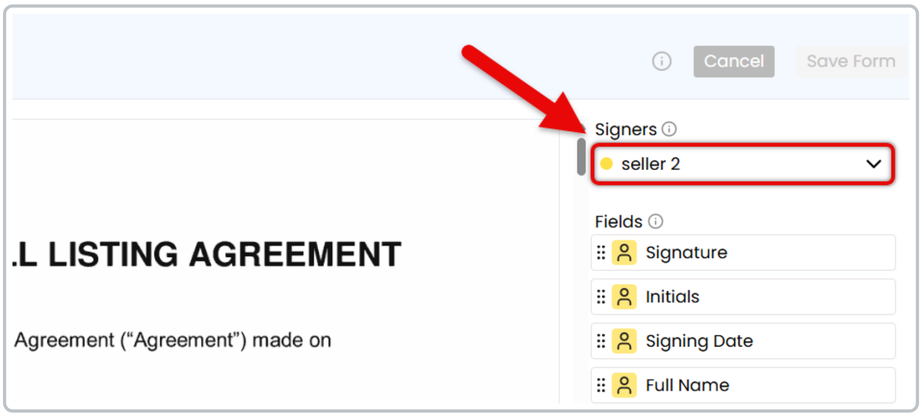
- Add **Full Name** and **Company** fields to automatically pull signer details directly from the transaction.
- Add a **Text** field when you need a flexible space that either the sender or signer can fill in with custom information.

- Add a **Checkbox** field when you need something acknowledged, required, or reviewed every time the form is used.


**Need help choosing the right fields?** Check the Signature Fields Reference Guide for details on each field type.

### Add Additional Signers & Place Their Fields

- Use the *Signers* dropdown to add each signer role, one at a time. Then, place only the fields that apply to each signer to keep the form clean and focused.




### Save the Form

- Once your fields are placed and the form is structured, click [Save Form].

Now, your team can use the Reference Form as a consistent starting point for signature requests.

## Edit a Reference Form

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

**Who Can Do This:** Master admins.

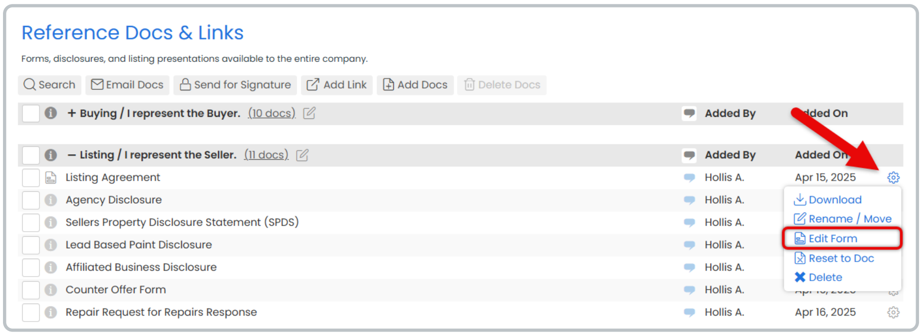
To make changes to a Reference Form:

### Go to Your Reference Library

- Click [Reference] from the top menu.

### 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].




### Update & Save the Form

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

## Reset a Reference Form

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

**Who Can Do This:** Master admins.

To reset a Reference Form:

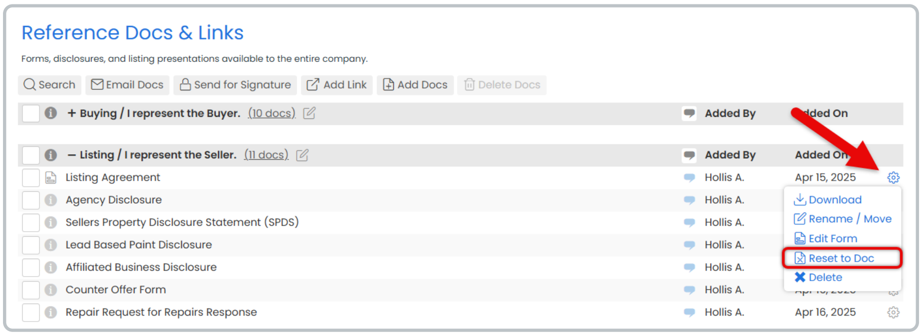
### Go to Your Reference Library

- Click [Reference] from the top menu.

### Choose the Doc to Reset

- Find the Reference Form you want to clear and reset.

- Click the gear next to it, then select [Reset to Doc].




#### Confirm

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

## View Reference Forms

View Reference Forms from your Reference Library or within individual transactions.

**Who Can Do This:** Anyone.

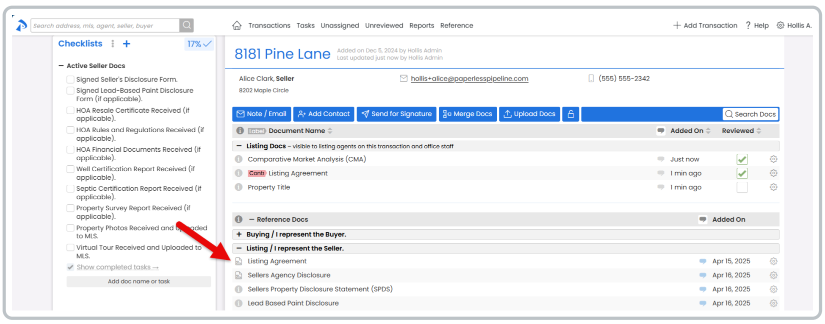
To view a Reference Form:

#### Access Reference

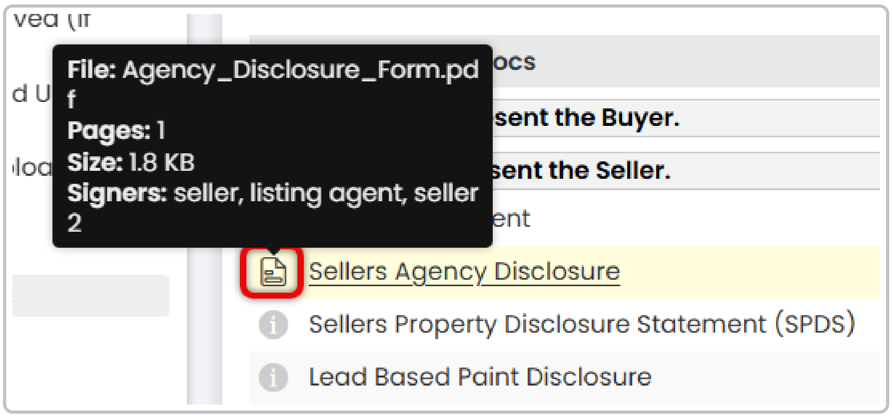
- You can access Reference Docs from two places:
  - Click [Reference] from the top menu.
  - Or, open a transaction, and scroll down to the *Reference Docs* section.

#### View Reference Forms

- Look for the form icon in the "i" column, this identifies a Reference Form.



- Hover over the icon to see more details, including the number of pages and included signers.




## Use Reference Forms

Use Reference Forms to send signature requests faster with preset signers, consistent fields, and fewer errors.

**Who Can Do This:** Anyone.

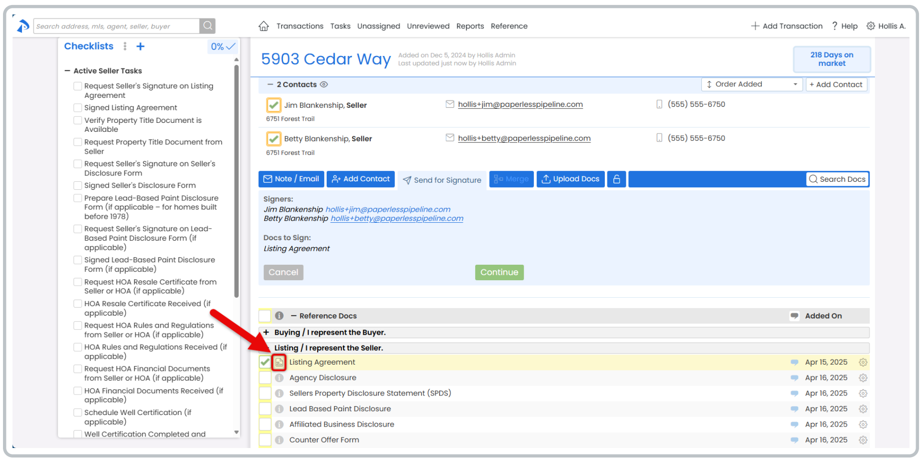
To send a signature request using a Reference Form:

### Start a Signature Request

- Start by sending a signature request from a transaction or Reference.

### Choose Reference Form(s)

- When choosing docs to be signed, select the Reference Form(s) you want to include.

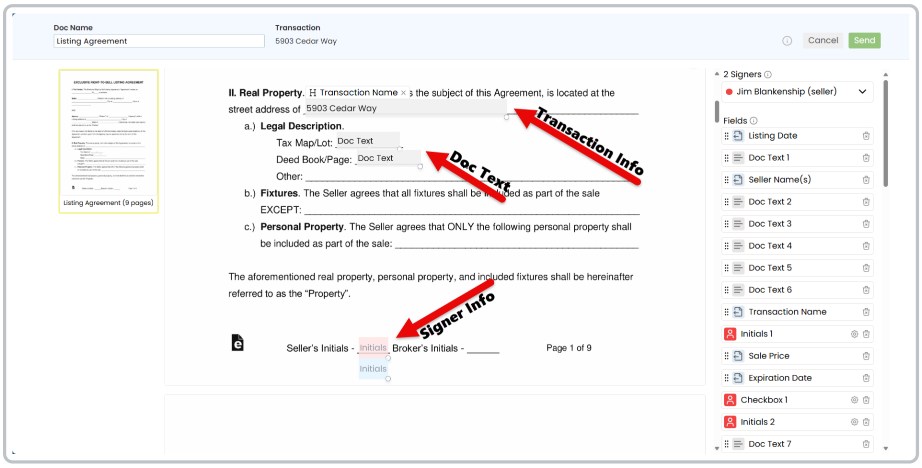


### Review Signers

- Open the *Signers* dropdown and make sure all required signers are listed.
- Add additional signers by clicking [Add Third, Fourth Party].
- Remove any signers that aren't needed: Hover over their name and click [x].


### Review & Fill Placed Fields

- Confirm any **Transaction Info** is autofilled from the transaction. If it isn't, enter it.
- Fill in any **Doc Text** fields that weren't filled by your admin.
- Fill in any **Signer** fields you're responsible for and leave the rest to the signers.




### Complete the Doc

- Fill in the remaining details you have and leave the rest for signers (outlined below).

Transaction Info

Add any deal-specific info using **Transaction Info** autofilled from the transaction.

Doc Text

Add any **Doc Text** fields for custom text.

Signer Fields

Add any missing **Signer** fields if needed.

Unneeded Fields

Remove any fields that aren't relevant to this request.

**Send Request**

- When the form is ready to be signed, finish sending the signature request as needed (depending on where you're sending it from).