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.

Name			
ng Agreement			() Cancel Save Fo
			Signers O
			listing agent
EXCLUSIVE	RIGHT-TO-SELL LISTING A	GREEMENT	listing agent 2 seller
I. The Parties. This Exc	usive Right-to-Sell Listing Agreement ("Agreeme	nt") made on	 seller 2 buying agent
	_, 20, is between:		buying agent 2buyer
Seller:	("Seller") with a mailing address of, City of	, State of	buyer 2escrow officer
	-		mortgage outside listing agent
AND			• title
Agency:	("Broker") of	("Agency") with a	II 🔁 Close Date
mailing address of	, City of		# 🔁 MLS Number
shall be referred to as the	_, State of Collectively, e "Parties".	the Seller and Agency	# 🔁 Listing Date
If for any reason the Bro	ker is not able to fulfill their duties under the term	s and conditions of this	II E Acceptance Date

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).

	(A) Cancel Save For
reement	Guider Save Por
	II 😫 Signing Date
	🗄 🔗 Full Name
EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT	🗄 😫 Company
	II 😫 Text
I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on	II 🔗 Checkbox
, 20, is between:	ii 🚍 Doc Text
	🗄 🛅 Transaction Name
Seller: ("Seller") with a mailing address of	🗄 🔁 Close Date
, only of, only of, on the of	🗄 🕘 MLS Number
	🗄 🛅 Listing Date
AND	:: 🔁 Expiration Date
Agency: ("Broker") of ("Agency") with a	# 🗄 Acceptance Date
mailing address of, City of	🗄 🔁 List Price
, State of Collectively, the Seller and Agency	ii 🕘 Sale Price
shall be referred to as the "Parties".	:: 🕘 Buyer Name(s)
	: D Seller 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.

Doc Name Listing Agreement	Cancel Save Form
	ii 😫 Signing Date
EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT	# 🔗 Company # 🔗 Text
I. The Parties. This Exclusive Right-to-Sell Listing Agreement ('Agreement') made on, 20, is between:	# 🔗 Checkbox
Seller: ("Seller") with a mailing address of . City of . State of	II 🔁 Transaction Name

Signer Fields

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

c Name		
sting Agreement		(i) Cancel Save Form
		≜ Signers ①
		• seller •
		Fields ①
EXCLUSIV	E RIGHT-TO-SELL LISTING AGREEMENT	# 😫 Signature
		# 🔗 Initials
I. The Parties. This E	Exclusive Right-to-Sell Listing Agreement ("Agreement") made on	🗄 🔗 Signing Date
	, 20, is between:	II 🤗 Full Name
		II 😫 Company

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.

	Signers ① Signers ① Seller
	Fields O
EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT	
I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on	II R Signing Date
, 20, is between:	E Pull Name
Seller: ("Seller") with a mailing address of	II 🙎 Company
, City of, State of	# 🤗 Text
	II 🔗 Checkbox
AND	II = Doc Text
	🗄 🔁 Transaction Name

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].

rms, disclosures,	and listing pres	sentations available to the e	entire company.					
) Search 🛛	Email Docs	🛆 Send for Signature	🖸 Add Link	Add Docs	Delete Docs			
🌔 + Buyir	ng / I represe	nt the Buyer. (<u>10 docs)</u>	Ľ			9	Added By	dded On
🕕 – Listin	ng / I represer	nt the Seller. (<u>11 docs)</u> [2			-	Added By	Added On
🔒 Listing A	Agreement					-	Hollis A.	Apr 15, 2025
Agency	Disclosure					-	Hollis A.	🕁 Download
Agency Disclosure Sellers Property Disclosure Statement (SPDS)		-	Hollis A.	Rename / Mo				
🕕 Lead Ba	ised Paint Dis	closure				-	Hollis A.	Edit Form
Affiliate	d Business Di	sclosure				-	Hollis A.	Reset to Doc
Counter	r Offer Form					-	Hollis A.	A Delete
Repair R	Request for Re	epairs Response					Hollis A.	Apr 16, 2025

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].

Reference Docs & Links		
Q Search ⊠Email Docs A Send for Signature C Add Link Add Docs A Delete Docs		
+ Buying / I represent the Buyer. (10 docs).	Added By	dded On
Listing / I represent the Seller. (<u>11 docs</u>)	Added By	Added On
Listing Agreement	Hollis A.	Apr 15, 2025 💮
Agency Disclosure	Hollis A.	⊎ Download
Sellers Property Disclosure Statement (SPDS)	Hollis A.	Rename / Move
Lead Based Paint Disclosure	 Hollis A. 	Edit Form
Affiliated Business Disclosure	Hollis A.	Reset to Doc
Counter Offer Form	 Hollis A. 	
Repair Request for Repairs Response	 Hollis A. 	Apr 16, 2025 💮

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.

Checklists + 17% -	8181 Pine Lane	ed on Deo 5, 2024 by Hollis Admin updated just now by Hollis Admin				
- Active Seller Docs						
Signed Seller's Disclosure Form.	Alice Clark, Seller	holis+alice@paperlesspipeline.com	(555) 555-2342			
Signed Lead-Based Paint Disclosure Form (if applicable).	8202 Mople Circle					
 HOA Resale Certificate Received (if applicable). 	🖻 Note / Email 🔗 Add Contact	Send for Signature So Merge Docs 🛧 Upload Docs 🗧	à		Q Search I	200
 HOA Rules and Regulations Received (if applicable). 	Document Name		-	Added On 0	Reviewed 0	
HOA Financial Documents Received (if	 Listing Docs - visible to listing agent 	its on this transaction and office staff				
opplicable).	Comparative Market Analysis (C	CMA)		Justnow	~	
Well Certification Report Received (if applicable).	Control Listing Agreement			1 min ago	~	ę
 Septic Certification Report Received (if applicable). 	Property Title		-	1 min ago		
Property Survey Report Received (if						
applicable).	Reference Docs				Added On	
to MLS.	+ Buying / I represent the Buyer.					
Virtual Tour Received and Uploaded to	- Listing / I represent the Seller.					
Show completed tasks	🖹 🗈 Listing Agreement				Apr 15, 2025	ę
	Sellers Agency Disclosure				Apr 16, 2025	6
Add doc name or task	Sellers Property Disclosure State	ement (SPDS)			Apr 16, 2025	6
	Lead Based Point Disclosure				Apr 16, 2025	

• Hover over the icon to see more details, including the number of pages and included

signers.

vea (II	
File: Agency_	_Disclosure_Form.pd ^{OCS}
Pages: 1	sent the Buyer.
Ioa Size: 1.8 KB Signers: selle	sent the Seller.
2	ent
	Sellers Agency Disclosure
	Sellers Property Disclosure Statement (SPDS)
	Lead Based Paint Disclosure

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.

Checklists + 0%	5903 Cedar Way	ded on Dec 5, 2024 by Hollis Admin t updated just now by Hollis Admin		218 Days on market
	- 2 Contrate @		1 Order Added	- I a satu Contor
Request Seller's Signature on Listing	- 2 Contacts (b)		1 Oldel video	* + Add Contoc
Signed Listing Agreement	Jim Blankenship, Seller	hollis+jim@paperlesspipeline.com	(555) 555-6750	
Verify Property Title Document is	6751 Forest Troil			
Request Property Title Document from Seller	Betty Blankenship, Seller	hollis+betty@paperlesspipeline.com	. (555) 555-6750	
Request Seller's Signature on Seller's Disclosure Form				0 · · · · ·
Signed Seller's Disclosure Form	Mote / Emoil A+ Add Contact <	7 Send for Signature 30 Merge T, Upload Docs		Q Search Da
 Prepare Lead-Based Paint Disclosure Form (if applicable – for homes built before 1978) 	Signers: Jim Blankenship hallis+jim@paperlessp Betty Blankenship hallis+betty@paperle	ipeline.com ispipeline.com		
Request Seller's Signature on Lead- Based Paint Disclosure Form (if applicable)	Docs to Sign: Listing Agreement			
Signed Lead-Based Paint Disclosure Form (if applicable)	Cancel	Continue		
Request HOA Resale Certificate from Seller or HOA (if applicable)	_			
HOA Resale Certificate Received (if applicable)	Reference Docs			Added On
Request HOA Rules and Regulations from Seller or HOA (if applicable)	+ Buying / I represent the Buyer.			
HOA Rules and Regulations Received (If applicable)	Listing / I represent the Seller.			
Request HOA Financial Documents	Listing Agreement			Apr 15, 2025
from Seller or HOA (if applicable)	Agency Disclosure			Apr 16, 2025
 HOA Financial Documents Received (if applicable) 	Sellers Property Disclosure Stater	ment (SPDS)		Apr 16, 2025
Schedule Well Certification (if	Lead Based Paint Disclosure			Apr 16, 2025
applicable)	Affiliated Business Disclosure			Apr 16, 2025

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].

Doc Name	Transaction	
Listing Agreement	5903 Cedar Way	 Cancel Sen
EXCLUSIVE INSULT TO ADD, LETING AND CONTACT		2 Signers ⊙ ● Jim Blankenship (seller) ✓
Control and a second seco	EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT	 Jim Blankenship (seller) Betty Blankenship (seller 2)
Bare A Constant Section and a strategy and strate A constants of the strategy and strategy and strategy A constants of the strategy and strategy and strategy and strategy A strategy and a strategy and strategy and strategy and strategy A strategy and strategy and strategy and strategy and strategy and strategy	I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on	Add Third Porty
Listing Agreement (9 pages)		🗄 🚍 Doc Text 2 🔹
	Seller: Jim & Betty Blankenship ("Seller") with a mailing address of	ii 🚍 Doc Text 3 🔅
	City of State of	n = normal d

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.

Doc Name	Transaction		
Listing Agreement	5903 Cedar Way	 Cance 	l Se
		▲ 2 Signers ①	
CROADING MINTY TO ADD, LETING ADDICATION TO	I Real Property H Transaction Name x the subject of this Agreement, is located at the	 Jim Blankenship (seller) 	
Mar And a second se	atroat address of 5903 Cedar Way		
and Section 2 Control of Control	sileet address of store codal way	Fields ①	
And a start of the second to the second seco	a.) Legal Description.	II III Listing Date	
EXAMPLE VIEW AND	Tax Map/Lot: Doc Text		
Anna P. Mar and Anna Anna Anna Anna Anna Anna Anna	Deed Book/Page: Doc Text	II E Doc Text 1	
	Other:	II 🔁 Seller Name(s)	
1 mm_mm_ +++	b.) Fixtures. The Seller agrees that all fixtures shall be included as part of the sale		
Listing Agreement (9 pages)	EXCEPT:	: Doc Text 2	
	c.) Personal Property. The Seller agrees that ONLY the following personal property shall	II 🚍 Doc Text 3	
	be included as part of the sale:	I = Doo Toxt 4	
		B DOC TEXT 4	
	The aforementioned real preparty, personal preparty, and included first use shall be bereighter	II 📰 Doc Text 5	
	Interactioned real property, personal property, and included includes shall be neremaner	# E Doc Text 6	
	referred to as the Property .		
	nerti	🗄 🛃 Transaction Name	
	Sign.	A Initials 1	۲
	Seller's Initials - Initials, Broker's Initials - Page 1 of 9	" D Cala Drian	
	Initials	: El sule Filce	
		🗄 🔁 Expiration Date	
		A Checkbox 1	۲
		R Initials 2	۲

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).