Signature Fields Explained

Use this guide to understand how signature request fields work when preparing a doc to be signed — whether you're building a Reference Form or sending a one-off Signature Request. This will help you confidently place the right fields in the right spots and give your signers a smooth experience.

Introduction

Each field in a signature request plays a specific part; some are autofilled from the transaction, some require signer input, and others help you add context or clarity.

This guide breaks down what each field does, when to use it, and who's responsible for completing it.

Transaction Info

What It Does: Automatically pulls in key details from the transaction. When the information isn't available, it can be entered by senders manually.

When to Use: Use to keep important deal info consistent across docs without needing to retype or manually update it.

Who Fills It In: System (autofilled based the transaction). If missing, senders can fill it in manually before sending.

Fields:

- Transaction Name
- Close Date
- MLS Number
- Listing Date
- Expiration Date
- Acceptance Date
- List Price
- Sale Price
- Buyer Name(s)
- Seller Name(s)

Document Text

What It Does: Displays static or custom text on a doc. It's great for information that isn't covered by other fields.

When to Use: Use on Reference Forms for standard text that should appear every time. When sending a signature request, use to fill in specifics that aren't covered by other fields.

Who Fills It In: Admins (when creating Reference Forms) or senders (when preparing a request). Admins can pre-fill or leave placeholders. Senders can complete or insert their own.

Field: Document Text

Signature Fields

What It Does: Fields the signer must complete. These are tied to a specific person and role.

When to Use: Use for required signer input.

Who Fills It In: Signer

Fields:

- Signature
- Initials
- Signing Date

Flexible Fields

Signer Info

What It Does:

When to Use:

Who Fills It In:

Fields:

- Full Name
- Company

Text

What It Does:

When to Use:

Who Fills It In:

Field: Text

Checkbox

What It Does:

When to Use:

Who Fills It In:

Field: Checkbox

All Fields Reference Chart

Field	What It Does	When to Use	Who Fills It In

Field	What It Does	When to Use	Who Fills It In
Signature	Allows the signer to add their full signature.	Use on sections requiring formal sign-off.	Signer
Initials	Lets the signer initial a section of the doc.	Use for multi-page docs or key clauses.	Signer
Signing Date	Records the date the signer signs the document.	Use to track signature timing.	Signer
Full Name	Auto-fills the signer's name from the transaction.	Use when the name needs to appear in the doc.	System or Sender
Company	Auto-fills the signer's company from the transaction.	Use for business or brokerage documents.	System or Sender
Text	Open text box for custom details.	Use when input varies per deal.	Sender or Signer
Checkbox	Signer checks to acknowledge or confirm.	Use for approvals, opt-ins, or compliance.	Signer
Document Text	Displays static or custom text on the doc.	Use for disclaimers or required language.	Admin or Sender
Transaction Name	Auto-fills with the transaction's name.	Use to clearly identify the deal.	System or Sender
Close Date	Auto-fills with the expected closing date.	Use in contracts or schedules.	System or Sender
MLS Number	Auto-fills with the listing's MLS ID.	Use when referencing listing data.	System or Sender
Listing Date	Auto-fills with the date the property was listed.	Use on disclosures or timelines.	System or Sender
Expiration Date	Auto-fills with listing expiration date.	Use when setting contract duration.	System or Sender
Acceptance Date	Auto-fills with the date the offer was accepted.	Use in contract timelines.	System or Sender
List Price	Auto-fills with the listing price.	Use for pricing history or disclosures.	System or Sender
Sale Price	Auto-fills with the agreed sale price.	Use in deal summaries or contracts.	System or Sender
Buyer Name(s)	Auto-fills with the buyer(s) on the transaction.	Use to identify the buyer in the doc.	System or Sender

Field	What It Does	When to Use	Who Fills It In
Seller Name(s)	Auto-fills with the seller(s) on the transaction.	Use to identify the seller in the doc.	System or Sender