Pipeline eSign Forms

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:

Go to Your Reference Library

- Click [Reference] from the top menu.

If you don't have PDF documents in your Reference Library, add some first. Learn how.

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].

Select a Signer

- Choose the role of someone who will always sign this form using the *Signers* dropdown in the right 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.

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.

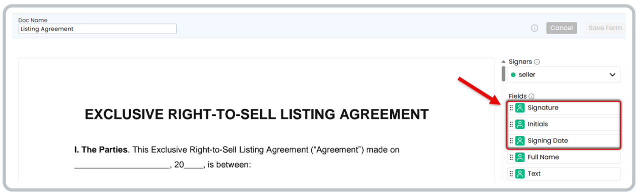
Document Text

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** 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.
- Add a **Select**, **Radio**, or **Checkbox Group** to offer predefined choices. Copy and paste your first option for easy placement of subsequent options.

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.

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

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.

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To make changes to a form:

Go to Your Reference Library

- Click [Reference] from the top menu.

Choose a Doc to Edit

- Find the 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 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:

Go to Your Reference Library

- Click [Reference] from the top menu.

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].

Confirm Reset

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

Send eSign Requests

Learn how to Send eSign Requests