Send a Blank Form and Get the Signed Copy Back

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The form lives on your Reference page, the executed copy belongs on the transaction — and there's a clean path between them that leaves a record of the send.

Introduction

An agent needs a blank office form. You want the completed, signed version on the deal, and you want to be able to prove, later, that you sent it and when.

The instinct is to drag the form from Reference onto the transaction, and that's not possible on purpose. A Reference doc is a blank; a transaction is a record of a deal. Putting an empty form on a file would mean the file now contains a document nobody signed, which is the opposite of what the file is for.

So the path runs the other way round: send the blank from the transaction, let the agent fill it wherever they fill PDFs, and take the completed copy back in as a normal upload. Each half is one step, and the send is recorded for you.

When to Use This

- An agent needs a blank form and you're about to email it from your own computer.
- You tried to drag or assign a Reference doc onto a transaction and couldn't.
- You want a record on the file showing the form was sent and when.
- You're uploading blank forms to transactions just to email them, then deleting them afterwards.
- An agent is asking whether they can fill in the form inside Pipeline.

Why This Beats Uploading a Blank to the Transaction

Uploading the blank so you can email it works exactly once, then leaves you a document to delete — and offices doing this several times a day end up asking us for a bulk delete that doesn't exist. Worse, if you forget, the transaction now holds an unexecuted form that looks like part of the deal.

Sending from Reference costs the same effort and leaves nothing to clean up. The message lands in the transaction's own log with the doc name attached, so you get the record without the residue.

1. Keep the Blank Form on the Reference Page

One copy of each form, posted once, in the place the whole office can reach. This is what makes the rest of this a two-click job instead of a hunt through your downloads folder.

Your company's Reference page is the shared library — the blank forms, disclosures, training material, and links an admin posts once so nobody on the team has to hunt for them.

See Reference Library & Forms

2. Send It From the Transaction, Not From Reference

Open Note/Email on the transaction that needs the form. Below Transaction Docs, click the **[+]** beside Reference Docs, tick the form you want, and send.

Doing it here rather than from the Reference page is what earns you the record: the message lands in the transaction's Notes & Sent Emails log and in its history, with the recipient, the time, and the document that went with it.

> Leave the subject line blank and Pipeline fills in the transaction name, so the agent sees which property the form is for without you typing the address.

3. Track the Obligation With a Checklist Task

Sending the form doesn't make it come back. A checklist task for the completed document is what keeps the ask alive — it shows on the transaction, it can carry a due date that puts it into the agent's reminder emails, and it goes red when it's overdue.

The tasks on a checklist are the documents to collect and the steps to finish on a transaction.

See Document Names or Tasks to Track

> Don't use a blank placeholder doc on the transaction as the reminder. It doesn't prompt anybody, and it leaves an unsigned form sitting on the file looking like evidence.

4. Have the Agent Fill It Outside Pipeline

Pipeline isn't a form builder and has no fillable-form feature — a PDF in Pipeline is a document to store, preview, and share, not one to type into.

The agent opens the form with **Open Original Doc**, fills it in a real PDF program, and saves it. Worth telling them once: a browser's built-in PDF viewer often won't save what was typed into a form. Adobe Acrobat Reader, or any proper PDF application, will.

5. Take the Completed Copy Back In

The signed version comes in like any other document — uploaded to the transaction, or emailed to its maildrop address. Now the file holds what it should: the executed form, and nothing else.

Drag a stack of PDFs in or pick them from your computer — docs go straight onto a transaction, or into Unassigned to file later.

See Uploading Docs