

eSign Forms FAQ

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Master admins build eSign forms from the PDFs on your Reference page, and every field stays editable when a request goes out. Answers to the common questions about who builds forms, what you can put on them, and what a sender can change.

Who can create an eSign form?

Master admins, on an account subscribed to Pipeline eSign. Everyone else uses the forms your master admin builds — creating, editing, and resetting are master admin actions.

What documents can I turn into a form?

PDFs that are already on your Reference page. The [Convert to Form] option sits on the gear next to a Reference doc, so if the document isn't there yet, upload it to Reference first.

Does Pipeline come with state, board, or MLS forms?

No, and there's no sync with a forms library. Pull the current PDF from your association's platform, put it on your Reference page, and build the form from it. Keeping those versions up to date stays with your office.

What kinds of fields can I put on a form?

Four families. **Transaction Info** pulls values from the transaction (*Transaction Name, Listing Date, Buyer Name(s)*). **Document Text** is wording that appears every time. **Signer Fields** are the signer's job — *Signature, Initials, Signing Date*. **Flexible Fields** can be completed by either the sender or the signer: *Full Name, Text, Checkbox, Select, Radio*, and *Checkbox Group*.

What happens if a field is still empty when someone sends the form?

The sender has to fill it in before the request can go out. Transaction Info and Document Text can be set by the admin building the form, by the sender, or by both — anything left empty becomes required at send time.

Can the person sending a form change it?

Yes — every field is editable at send time. That's what lets one form handle the variations between deals instead of needing a separate form for each.

Do I have to include every signer on every request?

No. Build the form with every signer role it could ever need, and each sender picks which of those signers to include on the request in front of them.

How do I keep track of which fields belong to which signer?

By color. Each signer role has its own color and their fields match it. Select a role in the **Signers** dropdown and place only that signer's fields before switching.

Can I turn a form back into a plain doc?

Yes — use [Reset to Doc]. It clears the signers and fields and restores the original PDF, so you can start the form over.

Can signers sign on their phone?

Yes. Each signer gets a secure link showing only the fields they're responsible for, and it works on a phone, a tablet, or a desktop.

Learn More

Turn a PDF from your Reference page into a reusable form with the signers named, the fields placed, and transaction details already filled in — so the doc your office sends most goes out the same way every time.

See [eSign Forms](#)

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.
