eSign Forms

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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.

Introduction

Some documents go out for signature every week. A seller's disclosure, your brokerage's service agreement, the paperwork every new agent signs. Without a form, whoever sends one rebuilds the request each time: drop in the PDF, find every signature line, drag a box onto it, and type the property address again.

A form does that setup once. Someone takes the PDF from your *Reference* page, names the roles who sign it, and places each field where it belongs. After that, the sender picks the form, and on a transaction Pipeline fills in the details it already has. The sender can still change any field before it goes out. That lets one form fit different deals, and it also means a form can't lock wording in place.

The building is your office's work, one document at a time. Pipeline doesn't carry state, board, or MLS forms, so the PDFs come from your association, and a new version from them means building the form again. That's why forms pay off fastest on the documents your brokerage writes itself and rarely changes.

How It Works

What You Can Put on a Form

A form is a Reference PDF with fields dragged onto it from the **Fields** panel. Add signer roles one at a time and place only that signer's fields while their role is selected — fields are color-coded to match, so a glance tells you who owns what.

Field type	What it holds
Transaction Info	Details pulled straight from the transaction — *Transaction Name*, *Listing Date*, *Buyer Name(s)*.
Document Text	Wording that should appear every time — your brokerage name, company details, required legal language.
Signer Fields	What the signer is responsible for — *Signature*, *Initials*, *Signing Date*.
Flexible Fields	Filled by the sender or the signer, whoever has the information — *Full Name*, *Text*, *Checkbox*, *Select*, *Radio*, *Checkbox Group*.

What the Sender Still Chooses

Build the form with every signer it could ever need; each sender picks which of those to include on the request in front of them, and every field stays editable. Whatever a Transaction Info or Document Text field is still missing, the sender fills in before the request goes out.

What the Signer Sees

A secure link showing only the fields they're responsible for. It opens on a phone, a tablet, or a desktop and walks them through what they need to complete.

Create an eSign Form

Turn a Reference doc into a reusable form with the signers, fields, and transaction details already in place.

Who Can Do This: Master admins whose company is subscribed to Pipeline eSign.

To create an eSign form:

1. Click [Reference] from the top menu.
2. Find the PDF you want to turn into a form, click the gear next to it, then select [Convert to Form].
3. Choose the role of someone who always signs this document from the **Signers** dropdown in the right menu. Start with the primary signer — the Seller or the Buyer — so the rest of the fields hang off the right role.
4. Drag that signer's fields from the **Fields** panel onto the doc.
5. Add each remaining signer role from the **Signers** dropdown, one at a time, placing only that signer's fields before you move on.
6. Click [Save Form].

The doc is now a form your team can use as the starting point for signature requests.

Don't see the PDF you need on the Reference page? Put it there first.

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

Edit an eSign Form

Update a form's signers, fields, or content so your team always sends the current version.

Who Can Do This: Master admins whose company is subscribed to Pipeline eSign.

To edit an eSign form:

1. Click [Reference] from the top menu.
2. Find the form you want to change, click the gear next to it, then select [Edit Form].
3. Make your updates.
4. Click [Save Form].

The updated form is what your team sends from here on.

Reset an eSign Form to the Original Doc

Clear a form's signers and fields, restoring the plain doc you started from.

Who Can Do This: Master admins whose company is subscribed to Pipeline eSign.

To reset an eSign form:

1. Click [Reference] from the top menu.
2. Find the form you want to clear, click the gear next to it, then select [Reset to Doc].
3. Click [Clear] to confirm.

The signers and fields are gone and you're back to the original doc, ready to build the form again from scratch.

Frequently Asked Questions

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.