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

Every office has a handful of documents that go out for signature over and over. Without a form, somebody rebuilds the same request each time: drop in the doc, hunt for the signature line, drag a box onto it, retype the property address, retype the seller's name, and hope nothing got missed.

A form does that work once and then stops asking. Someone takes a PDF off your shared Reference page, names the roles who sign it, and places every field where it belongs. After that, whoever sends the document picks the form, confirms the details, and sends. Because the fields are tied to the transaction, Pipeline fills in what it already knows and asks only for what's genuinely missing. One master copy also means your office sends one correct version of a document instead of a dozen near-copies of it.

The honest trade is that the building happens up front, and it's yours to do. Pipeline doesn't carry a state, board, or MLS forms library, so the PDFs come from your association and keeping those versions current stays with your office. Build the two or three documents you send most and the payback comes fast. Build all forty before you've sent anything and you feel every one of them.

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.

eSign Forms FAQ

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.

See eSign Forms FAQ