

Use DocuSign with Paperless Pipeline

SUMMARY

Learn about using DocuSign with Paperless Pipeline.

Introduction

In Pipeline, you can easily send documents for signature via DocuSign and import documents back from DocuSign. By connecting Pipeline to DocuSign, you can send documents directly for signature from transactions or *Reference Docs*, and executed documents can be imported back into Pipeline from *Unassigned Docs*.



Connecting Pipeline to DocuSign is free once you sign up for a DocuSign account [Learn more about DocuSign →](#)

Who Can Do This?

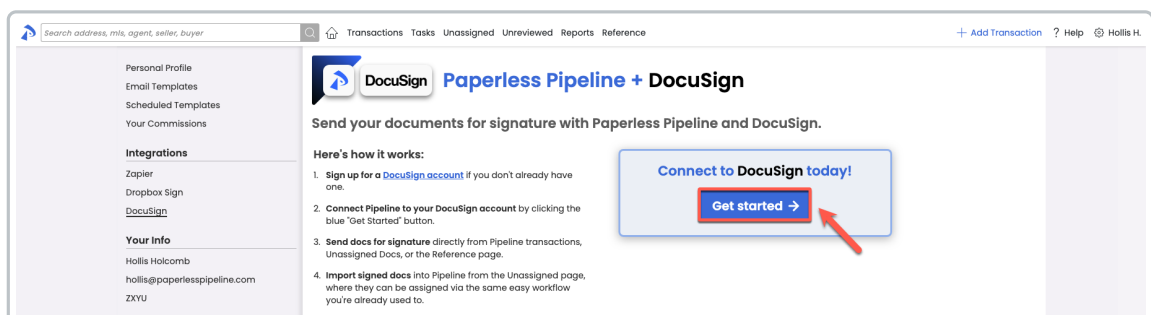
Anyone with a DocuSign account can connect to DocuSign to send requests for signatures and import docs.

How To

Connect Paperless Pipeline to DocuSign

To connect to DocuSign in Paperless Pipeline:

- 1 Go to your [Personal Profile](#) by clicking your name in the upper-right, then [Personal Profile].
- 2 Select [DocuSign] from the *Integrations* section on the left menu.
- 3 Click [Get Started], then complete the connection process.

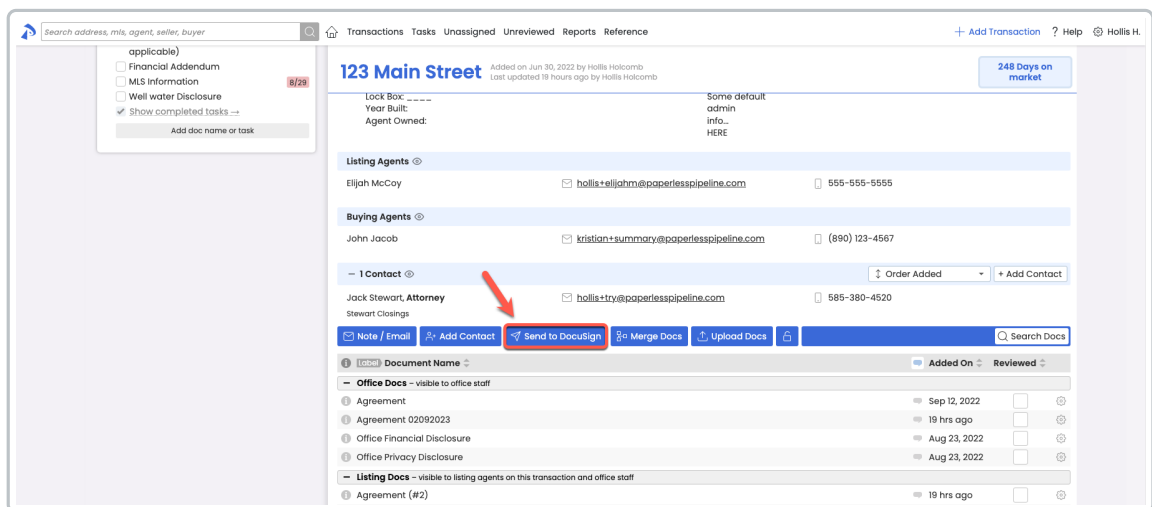


- Once you're connected to DocuSign, there will be options to "Send to DocuSign" or *Reference Docs* and transactions, as well as an option to "Import from DocuSign" or *Unassigned Docs*.

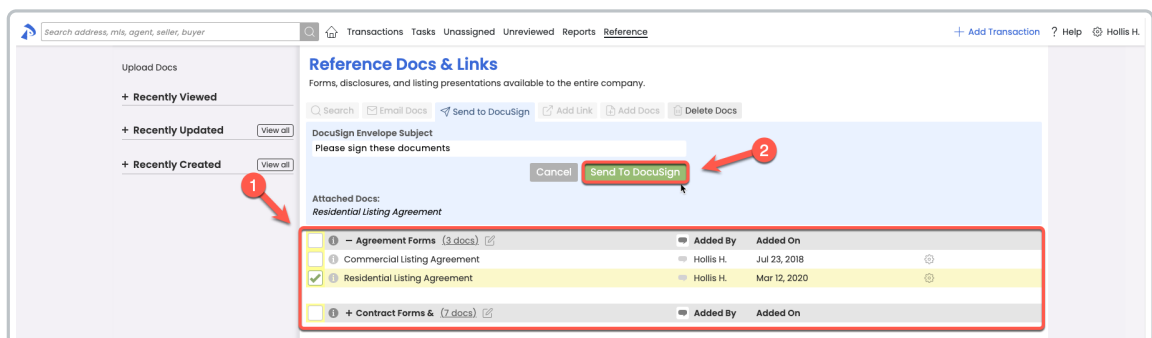
Send a Signature Request

To send a signature request from *Reference Docs* or from a transaction:

- Go to a transaction, or go to **Reference Docs** by clicking [Reference] from the top menu.
- Click [Send to DocuSign].

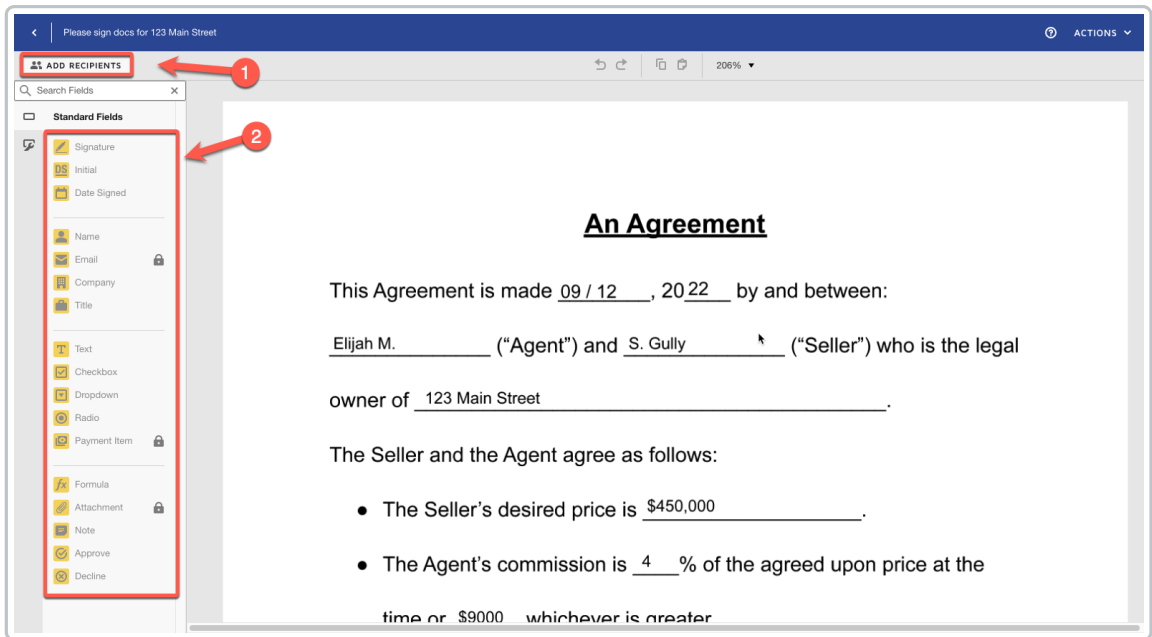


- Check the yellow boxes next to the docs to send for signature then click [Send to DocuSign].



- Complete the signature request:

- Click [Add Recipients] to add your desired recipients.
- Drag and drop the fields for Signatures, Initials, and other information needed to your desired position within the docs, and repeat for each signer as needed.

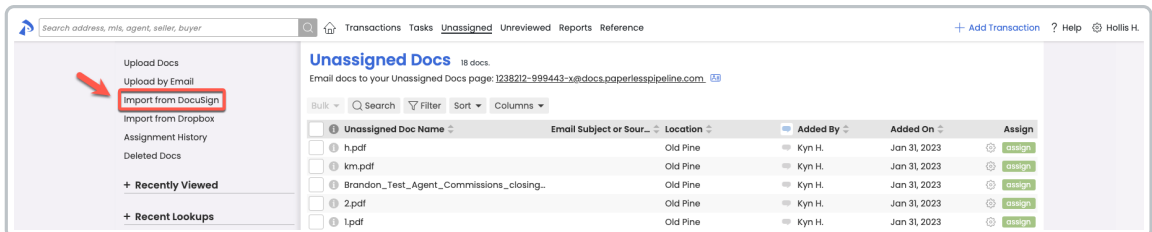


- 5 Click [Send] once you've completed all the information needed for your request.

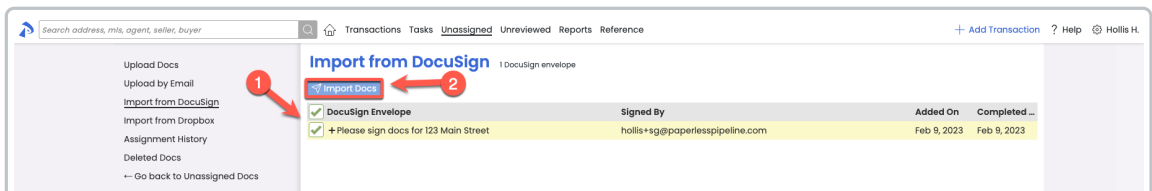
Import Docs from DocuSign

To import docs from DocuSign to the *Unassigned Docs* page:

- 1 Go to **Unassigned Docs** by clicking [Unassigned] from the top menu.
- 2 Click [Import from DocuSign].



- 3 Check the boxes next to your desired docs then click [Import Docs].



- 4 Wait about 30 seconds, then refresh the *Unassigned* page. The selected document(s) will be imported from DocuSign into your *Unassigned Docs*.

Search address, mis, agent, seller, buyer

Transactions Tasks **Unassigned** Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H.

Unassigned Docs 18 docs

Email docs to your Unassigned Docs page: 1238212-999443-x@docs.paperlesspipeline.com

Bulk Search Filter Sort Columns

| Unassigned Doc Name | Email Subject or Sour... | Location | Added By | Added On | Assign |
|--|--------------------------|-------------------|-----------|--------------|---------------------------------------|
| <input type="checkbox"/> Agreement.pdf | Imported from DocuSign | Austin, Elsewhere | Hollis H. | 21 mins ago | <input type="button" value="assign"/> |
| <input type="checkbox"/> h.pdf | | Old Pine | Kyn H. | Jan 31, 2023 | <input type="button" value="assign"/> |
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