Use Dropbox Sign with Paperless Pipeline

SUMMARY

Learn about using Dropbox Sign (formerly known as HelloSign) with Paperless Pipeline.

Introduction

You can connect Pipeline to your Dropbox Sign account to send docs for signature directly from transactions or from *Reference Docs*. Once your Pipeline account is connected to Dropbox Sign, you'll see options to send docs for signature, send reminders, cancel, and check the status of any requests you've sent from Pipeline. Once docs are fully executed, they'll arrive automatically in *Unassigned Docs* where they can be assigned via the same easy workflow you're already used to.

Connecting Pipeline to Dropbox Sign is free once you sign up for a Standard or Premium Dropbox Sign subscription.

Paperless Pipeline customers on a paid plan who sign up for a new Dropbox Sign account receive a Dropbox Sign discount at signup for any Standard or Premium annual subscription. Discount requests must be made by going to the Dropbox Sign area in Pipeline and clicking [Request discount here \rightarrow].

Video 🛛

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Who Can Do This?

Anyone with a Standard or Premium Dropbox Sign account can connect to Dropbox Sign and send requests for signatures.

How To

Navigate to the Dropbox Sign Area

Before You Connect Pipeline to Dropbox Sign

1 Go to your Personal Profile by clicking your name in the upper right corner, then [Personal Profile].



After You Connect Pipeline to Dropbox Sign

² Select [Dropbox Sign] from the *Integrations* section on the left menu.

Connect Paperless Pipeline to Dropbox Sign

To connect to Dropbox Sign in Paperless Pipeline:

1 Go to your Personal Profile by clicking your name in the upper right corner, then [Personal Profile].

2 Select [Dropbox Sign] from the *Integrations* section on the left menu.

3 Click [Get Started], then complete the connection process.

Search address, mls, agent, seller, buye	ar O m Transactions Tasks Unassigned Unreviewed Re	eports Reference	+ Add Transaction	? Help 🛞 Ho	ollis H.
Personal Profile Email Templates Your Commissions	Paperless Pipeline + H	HelloSign			
Integrations	Send your documents for signature with He	lloSign and Paperless Pipeline.			
Zapier	Here's how it works:				
HelloSign DocuSign	 Sign up for a paid HelloSign account if you don't already have one. * 	Connect to HelloSign todo	ay!		
Your Info	 Connect Pipeline to your HelloSign account by clicking the blue "Get Started" button. 	Get started →			
Hollis Holcomb hollis@paperlesspipeline.com	 Send docs for signature directly from Pipeline transactions or the Reference page. 				
Z	 Remind, cancel, or check the status of requests from within Pipeline (along with email notifications, of course!) 				
Your Permissions Master Admin (account-wide, unlimited access ())	 Signed docs arrive automatically into Unassigned Docs, allowing them to be assigned via the same easy workflow you're already used to. 	D			

You'll now see the "Send to Dropbox Sign" option on Reference Docs and transactions.

Send a Signature Request

You can send a signature request from *Reference Docs* or from a transaction.

Send a Request from Reference

To send a signature request from *Reference Docs*:

1 Click [Send to Dropbox Sign] from the top of the Reference Docs page.

Search address, mis, agent, seller, buy	er Q A Transactions Tasks Unassigned Unreviewed Reports Reference
Upload Docs	Reference Docs & Links Forms, disclosures, and listing presentations available on the entire company.
+ Recently Viewed	Q Search ☐ Email Docs
+ Recently Updated View all	+ Contract Forms (7 docs) Added By

2 Check the yellow boxes next to the docs to send for signature then click [Continue].

Search address, mls, agent, seller, buyer	Q 🏠 Transactions Tasks Unassigned Unreviewed Re	ports <u>Reference</u>	+ Add Transaction	? Help 🛞 Hollis H.
Upload Docs + Recently Viewed	Reference Docs & Links Forms, disclosures, and listing presentations available to the entire cor	npany.		
+ Recently Updated (View all)	Signers: Signers will be entered in the next step, after choosing docs and clickina "Continue"			
	Docs to Sign: Residential Listing Agreement Cancel Continue			
	+ Contract Forms & (7_docs) 2	Added By Ad	ided On	
¢1	+ images (1 doc) 2	Added By Ad	lded On	
	 + image upload (<u>1doc</u>). Agreement Forms (<u>3 docs</u>). 	Added By Ad	lded On	
	Residential Listing Agreement Commercial Listing Agreement	Carol F. Ma Michael A. Ju	ar 12, 2020 🛞 I 23, 2018 🛞	
	1 + Listing Forms edit fff (10 docs).	Added By Ad	lded On	

3 Complete the request for signature(s):

• Enter the Signer's Email Address, then optionally add any additional signers, and click [Next].

• Drag and drop the fields for Signatures, Initials, and other information needed to your desired position within the docs, repeat for each signer as needed, andclick [Next].

• Optionally, add any CC recipients that should receive a copy of the request and a message for the signers.

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

Send a Request from a Transaction

To send a signature request from a transaction:

1 Click [Send to Dropbox Sign].

Well weter Diselesure	120			
✓ Show completed tasks →	123 Main Street 🖞	ldded on Jun 30, 2022 by Hollis Holcomb ast updated 17 hours ago by Hollis Holcomb		100 Days on market
Add doc name or task				
	Listing Agents 💿			
	Elijah McCoy	hollis+elijah@paperlesspipeline.com	. 665-695-6986	
	Buying Agents 💿			
	John Jacob	kristian+summary@paperlesspipeline.com	(890)123-4987	
	- 1 Contact 💿		1 Order Added	+ Add Conte
	Jack Stewart, Attorney	hollis+try@papert_spipeline.com	. 585-380-4520	
	Stewart Closings			
	🖸 Note / Email 🛛 유+ Add Contact	t 🛛 🛛 Send to HelloSign 🖁 Hange Docs 🐧 Upload Do	cs	Q Search D
	🚺 Label 🕈 Document Name 🗢		Added On	Reviewed \$\dot\$
	- Office Docs - visible to office staff			
	Agreement		🤍 Sep 12, 202	2
	Office Financial Disclosure		Aug 23, 203	22
	Office Privacy Disclosure		Aug 23, 203	22
	- Listing Docs - visible to listing goor	ate on this transaction and office staff		

2 Check the orange boxes next to your desired signers from the Listing Agents, Buying Agents, and Contacts section above.

Listing Agents 💿					
🛃 Elijah McCoy	∑ <u>hollis+elijah@paper</u> l	esspipeline.com	. 555-555-5555		
Buying Agents 💿					
John Jacob	∑ <u>kristian+summary@</u>	<u>paperlesspipeline.com</u>	. (890) 123-4567		
– 1 Contact ⊚			Crder Added	-	+ Add Contact
Jack Stewart, Attorney Stewart Closings	hollis+try@paperles	<u>spipeline.com</u>	. 585-380-4520		
🖸 Note / Email 💁 Add Contact	Send to HelloSign 🖁 Mer	ge Docs 🕺 Upload Doc	s 6		Q Search Doc
Signers: Elijah McCoy <u>hollis+elijah@paperles</u> Jack Stewart <u>hollis+try@paperlessp</u>	spipeline.com ipeline.com				
Docs to Sign: Agreement Office Privacy Disclosure					

3 Check the yellow boxes next to the docs to send for signature then click [Continue].

– 1 Contact ⊚		Order Added •	+ Add Contact
Jack Stewart, Attorney	hollis+try@paperlesspipeline.com	585-380-4520	a 🗹 🗙
Stewart Closings			
Note / Email A+ Add Contact	∜ Send to HelloSign 몸ª Merge Docs 1 Upload Doc	\$ 6	Q Search Docs
Signers: Elijah McCoy <u>hollis+elijah@paperles</u> Jack Stewart <u>hollis+try@paperlessp</u>	ipeline.com		
Docs to Sign:			
'eement ice Privacy Disclosure			
ancel	Continue		
abel 🜓 Document Name ≑		🥏 Added On 🌲	Reviewed 😂
Office Docs - visible to office staff			
Office Docs - visible to office staff Agreement		🥏 Sep 12, 2022	0
Office Docs - visible to office staff Agreement Office Financial Disclosure		Sep 12, 2022	0
Office Docs - visible to office staff Agreement Office Financial Disclosure Office Privacy Disclosure		 Sep 12, 2022 Aug 23, 2022 Aug 23, 2022 	() () () () () () () () () () () () () (
Office Docs - visible to office staff Office Privacy Disclosure Office Privacy Disclosure Usting Docs - visible to listing agent	s on this transaction and office staff	Sep 12, 2022 Aug 23, 2022 Aug 23, 2022	0 0 0 0 0 0

Confirm signers, then optionally add any additional signers, andclick [Next].
Drag and drop the fields for Signatures, Initials, and other information needed to your desired position within the docs, repeat for each signer as needed, and click [Next].
Optionally, add any CC recipients that should receive a copy of the request and a message for the signers.
Click [Send for Signature]once you've completed all the information needed for your request.

View Sent Requests

4 Complete the signature request:

To view Dropbox Sign signature requests you've sent from Paperless Pipeline:

1 Go to your Personal Profile by clicking your name in the upper right corner, then [Personal Profile].

2 Select [Dropbox Sign] from the *Integrations* section on the left menu.

A list of all signature requests you've sent from within Paperless Pipeline will be displayed along with their related information.

Search address, mls, agent, seller, buy	er Q 🏠 Transactions Tas	sks Unassigned Unreviewed Re	ports Reference	+ Add Transaction	? Help 🛞 Hollis H.
Personal Profile Email Templates Your Commissions Integrations	HelloSign Signature Rec	ess Pipeline + H	elloSign	Disconnec	it HelloSign Account
HelloSign	Doc Name	Request Created	Initiated From	Status	Signers
DocuSign	A Reference Document	September 14, 2022	Reference Docs	Incomplete	show 🔅
	Agreement	September 13, 2022	123 Main Street	Completed 09/13/22	show 🚯
Your Info					

Check Document Completion Status

To view the completion status of a signature request you've sent from Paperless Pipeline:

1 Go to your list of Dropbox Sign Signature Requests.

2 View the Status column next to any doc. For completed docs, the date of the document's completion will also be displayed.

Doc Name	Request Created	Initiated From	Status	Signers
A Reference Document	September 14, 2022	Reference Docs	Incomplete	show 63
Agreement	September 13, 2022	123 Main Street	Completed 09/13/22	show 🔅

Check Individual Signer Status

To view a list of Signers for a request:

1 Go to your list of Dropbox Sign Signature Requests.

2 Click [Show] in the *Signers* column next to any doc.

Doc Name	Request Created	Initiated From	Status	Signers
A Reference Document	September 14, 2022	Reference Docs	Incomplete	show 🔅
Agreement	September 13, 2022	123 Main Street	Completed 09/13/22	show 🔅

A pop-up window will appear showing each individual Signer's Name, Email and the Status of their signature.

Doc Name		Request Created II	nitiated Fror	n
Residential Listing Agreen	Signer Stat	2015		cs
22J Lead Base Paint signe				r Street
A Reference Document	Name	Email	Status	CS
Agreement	Agent Hollis	hollis+agendevt@paperlesspipeline.com	Signed	ət
	Odysseus Davis	hollis+odie@paperlesspipeline.com	Signed	
		Ok, Cio	ose This	

Send a Signature Request Reminder

To send a signature request reminder to a signer:

1 Go to your list of Dropbox Sign Signature Requests.

2 Click the gear to the right of the doc, then [Send Reminders].

Doc Name	Request Created	Initiated From	Status	Signers
Residential Listing Agreement	September 15, 2022	Reference Docs	Incomplete	show 🔅
22J Lead Base Paint signed by seller	September 15, 2022	123 December Street	Completed 09/15/22	Send Reminders
A Reference Document	September 14, 2022	Reference Docs	Incomplete	Cancel Request
Agreement	September 13, 2022	123 Main Street	Completed 09/13/22	Download PDF

³ Click [Send Reminders] to send a reminder to signers with aStatus of Awaiting Signature.

Doc Name		Request Created	Initiated From	m
Aar Critical Date List				br
Aar Critical Date List	Send Re	eminders		ad
	Name	Email	Status	
	Jim Peters	hollis+jp@paperlesspipeline.com	Awaiting Signature	
	Cancel		Send Reminders	

Cancel a Signature Request

To cancel a request you've sent from Paperless Pipeline:

1 Go to your list of Dropbox Sign Signature Requests.

2 Click the gear to the right of the doc, then [Cancel Request].

Doc Name	Request Created	Initiated From	Status	Signers
Residential Listing Agreement	September 15, 2022	Reference Docs	Incomplete	show 🔅
22J Lead Base Paint signed by seller	September 15, 2022	123 December Street	Completed 09/15/22	Send Reminders
A Reference Document	September 14, 2022	Reference Docs	Incomplete	Cancel Request
Agreement	September 13, 2022	123 Main Street	Completed 09/13/22	Download PDF

Download a Signature Request

To download the document of any signed or unsigned request you've sent from Paperless Pipeline:

1 Go to your list of Dropbox Sign Signature Requests.

2 Click the gear to the right of the doc, then [Download PDF].

Request Created	Initiated From	Status	Signers
September 15, 2022	Reference Docs	Incomplete	show 🚯
September 15, 2022	123 December Street	Completed 09/15/22	Send Reminders
September 14, 2022	Reference Docs	Incomplete	Cancel Request
September 13, 2022	123 Main Street	Completed 09/13/22	Download PDF
	Request Created September 15, 2022 September 15, 2022 September 14, 2022 September 13, 2022	Request Created Initiated From September 15, 2022 Reference Docs September 15, 2022 123 December Street September 14, 2022 Reference Docs September 13, 2022 123 Main Street	Request CreatedInitiated FromStatusSeptember 15, 2022Reference DocsIncompleteSeptember 15, 2022123 December StreetCompleted 09/15/22September 14, 2022Reference DocsIncompleteSeptember 13, 2022123 Main StreetCompleted 09/13/22

Remove a Signature Request

To delete a request from your list of signature requests:

1 Go to your list of Dropbox Sign Signature Requests.

2 If the request is incomplete, you'll need to cancel the signature request first.

3 Click the gear to the right of the doc, then [Remove from List].

Doc Name	Request Created	Initiated From	Status	Signers
Residential Listing Agreement	September 15, 2022	Reference Docs	Incomplete	show (စွဲ}
22J Lead Base Paint signed by seller	September 15, 2022	123 December Street	Completed 09/15/22	show {ô}
A Reference Document	September 14, 2022	Reference Docs	Incomplete	Download PDF
Agreement	September 13, 2022	123 Main Street	Completed 09/13/22	Remove from List

FAQ (Frequently Asked Questions)

What does it cost to connect Pipeline to Dropbox Sign?

Connecting Pipeline to Dropbox Sign is free but you do need to sign up for a Standard or Premium Dropbox Sign subscription.

Paperless Pipeline customers on a paid plan who sign up for a new Dropbox Sign account receive a Dropbox Sign discount at signup for any Standard or Premium annual subscription. Discount requests must be made by going to the Dropbox Sign area in Pipeline and clicking [Request discount here \rightarrow].

What is the Dropbox Sign discount percentage for Paperless Pipeline users?

The discount is determined by Dropbox Sign based on the plan you sign up for, so we aren't aware of the exact percentage.

Will I be able to send signature requests to someone that does not have a Dropbox Sign account?

Yes, once you're connected to Dropbox Sign in Pipeline, you can send anyone requests for signatures. Your agents, or any signers, will not need a Dropbox Sign account to sign your requested docs. Here's more info from Dropbox Sign's Help Center →

Why am I getting the error, "Payment Required, An upgrade is required to use this integration," when I try to connect to Dropbox Sign in Pipeline?

You will see this error if your current Dropbox Sign plan is lower than the plan required for the integration. To integrate with Dropbox Sign in Pipeline, you'll need to upgrade to Dropbox's Standard or Premium plan.