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 →].

Video 🎬

🕐 1:27

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].

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

After You Connect Pipeline to Dropbox Sign

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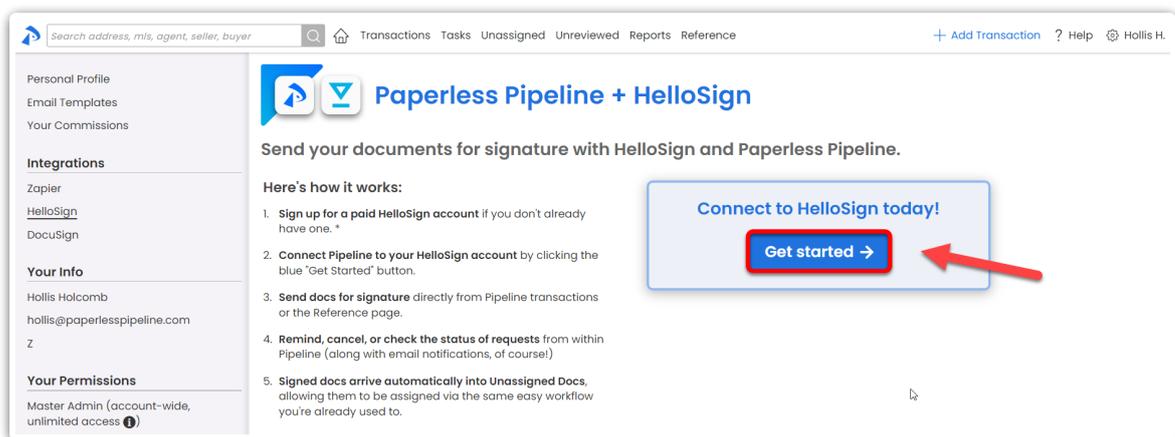
You'll now see the "Send to Dropbox Sign" option on *Reference Docs* and transactions.

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.
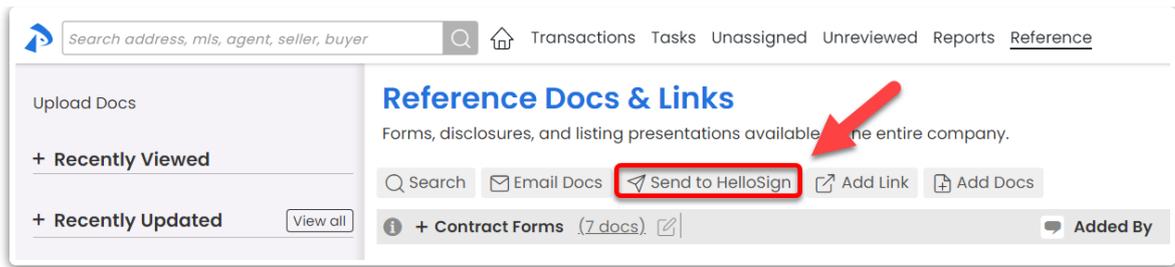
2 Check the yellow boxes next to the docs to send for signature, then **click [Continue].**
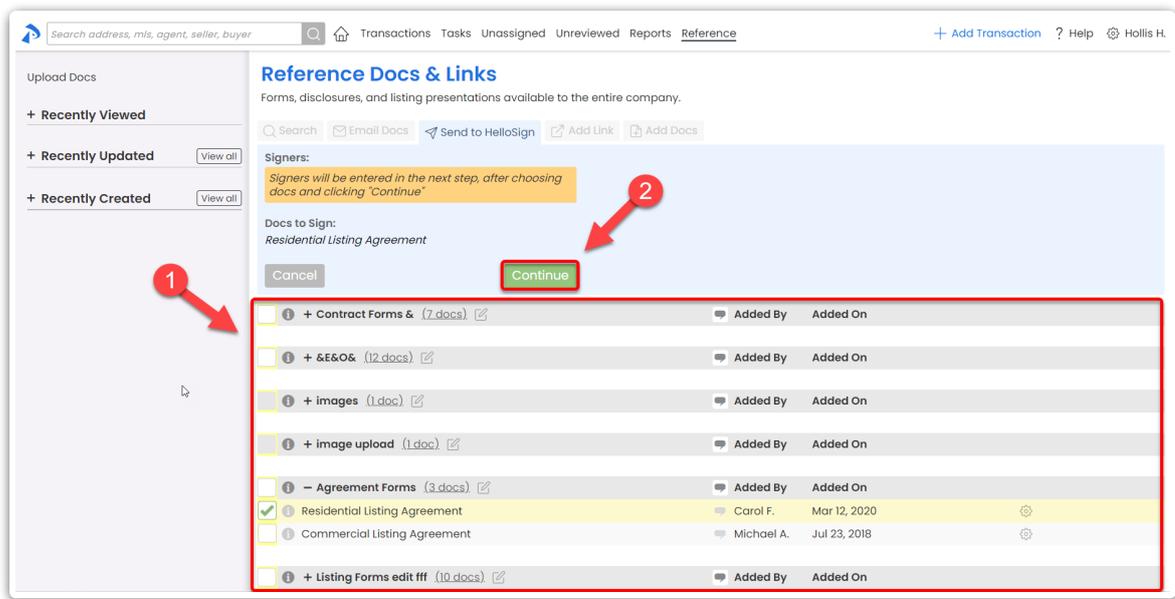
3 Complete the request for signature(s):

- **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, and **click [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].**
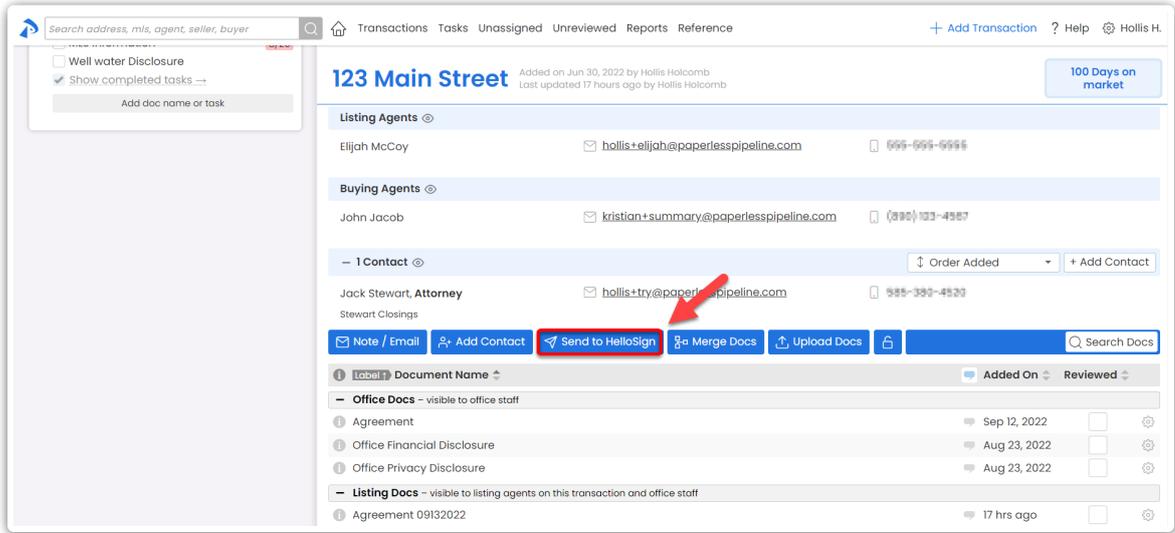
2 **Check the orange boxes next to your desired signers** from the *Listing Agents*, *Buying Agents*, and *Contacts* section above.
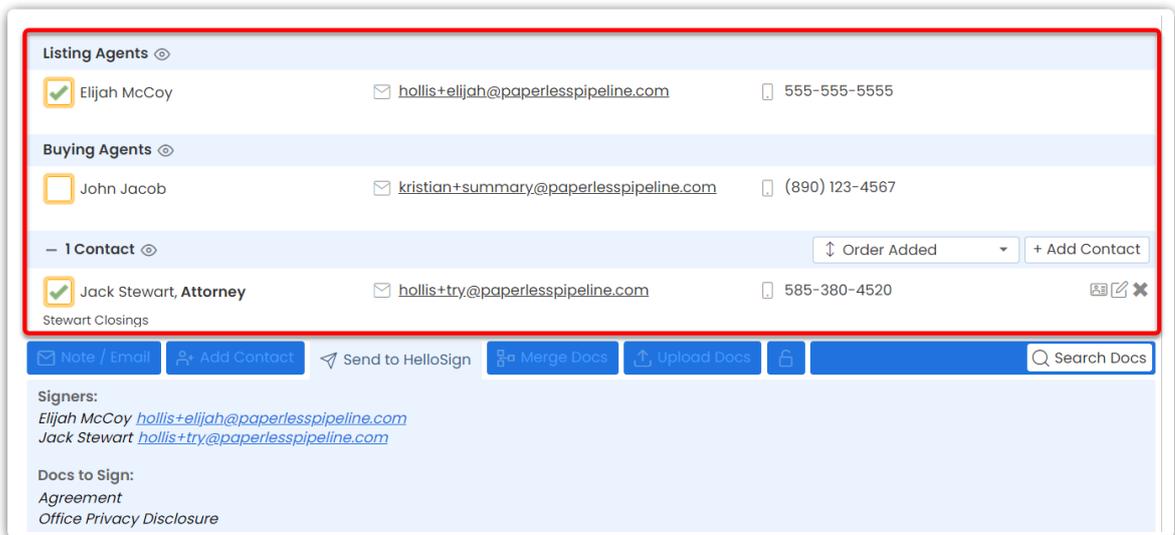
3 **Check the yellow boxes next to the docs to send for signature**, then **click [Continue].**
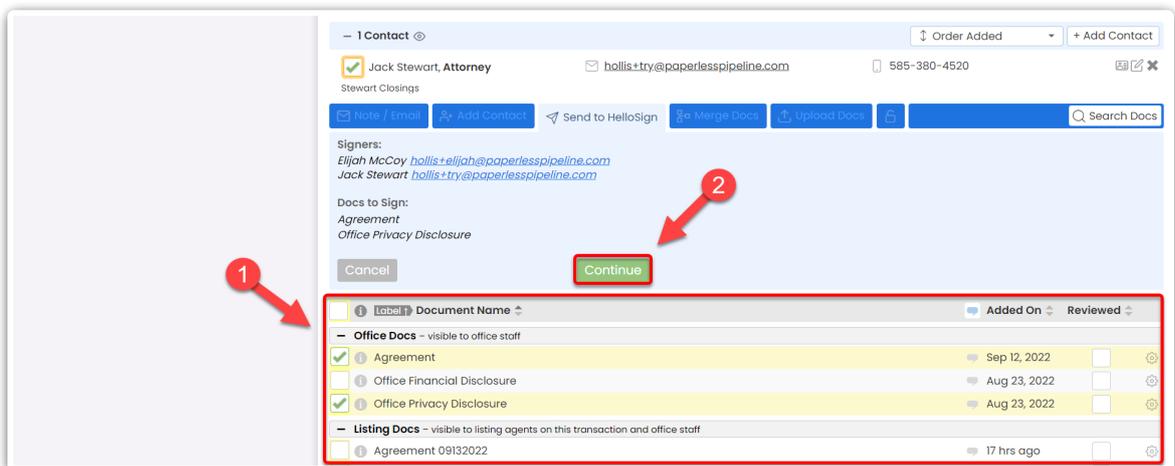
4 **Complete the signature request:**

- **Confirm signers,** 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**, and **click [Next].**

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

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

View Sent Requests

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.

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 ⚙
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	Initiated From
Residential Listing Agreem		cs
22J Lead Base Paint signe		r Street
A Reference Document		cs
Agreement		et

Signer Status

Name	Email	Status
Agent Hollis	hollis+agendevt@paperlesspipeline.com	Signed
Odysseus Davis	hollis+odie@paperlesspipeline.com	Signed

Ok, Close 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 a *Status* of *Awaiting Signature*.
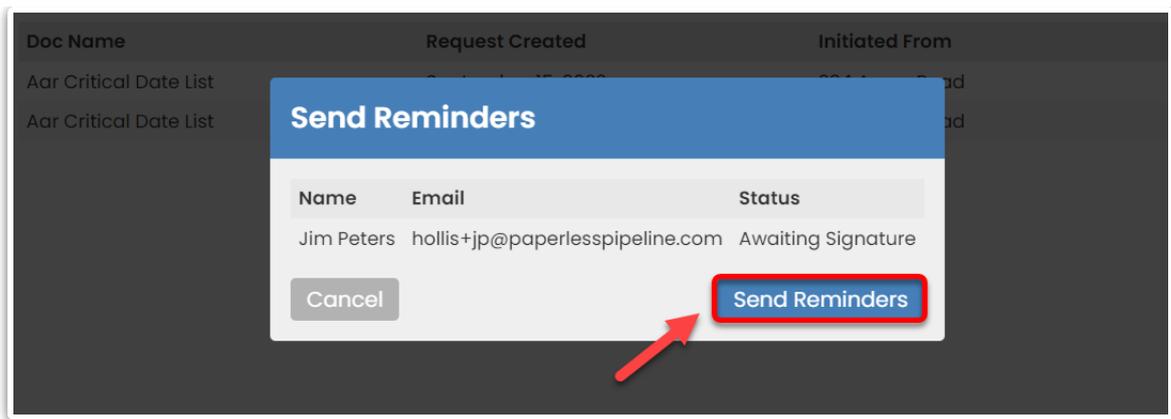
Cancel a Signature Request

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].**

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].**

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 ⚙
22J Lead Base Paint signed by seller	September 15, 2022	123 December Street	Completed 09/15/22	show ⚙
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 →].

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.