

Request Signatures via DocuSign

You can use Pipeline's integration with DocuSign to easily send signature requests from Pipeline and automatically receive signed docs back in Pipeline. [Learn more about DocuSign & Pipeline →](#)

Send DocuSign signature requests in Pipeline from a transaction, the *Unassigned* page, or the *Reference* page.

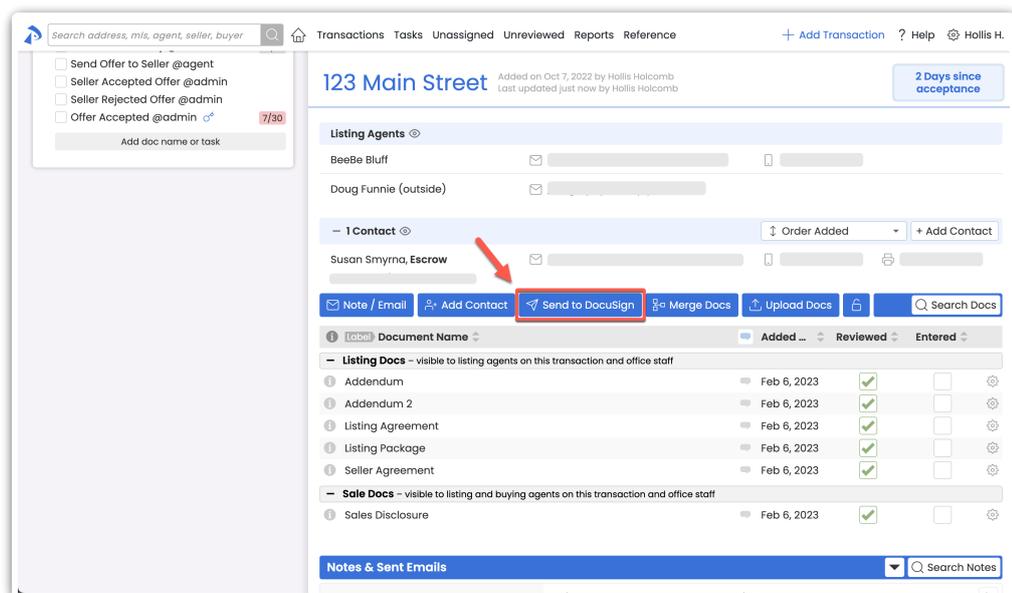
Send a Signature Request from a Transaction

Send a signature request from a transaction via DocuSign and automatically receive executed docs back in Pipeline.

Who Can Do This? Anyone with a [DocuSign](#) account that is connected to Paperless Pipeline.

To send a DocuSign signature request from a transaction:

- 1 Go to a transaction.
- 2 Click [Send to DocuSign] below the sections for *Agents* and *Contacts*.



- 3 Enter an *Envelope Subject* to name the DocuSign Envelope.

123 Main Street Added on Jun 30, 2022 by Hollis Holcomb
Last updated 24 minutes ago by Hollis Holcomb 407 Days on market

Listing Agents

- Elijah McCoy hollis+elijahm@paperlesspipeline.com 555-555-5555

Buying Agents

- John Jacob kristian+summary@paperlesspipeline.com (890) 123-4567

2 Contacts Order Added ▾ + Add Contact

- Leonardo, Buyer hollis+l@paperlesspipeline.com 555-555-5555 Turtle
Pizza Co / 123 Pizza
- Jack Stewart, Attorney hollis+try@paperlesspipeline.com 585-380-4520
Stewart Closings

[Note / Email](#) [Add Contact](#) [Send to DocuSign](#) [Merge Docs](#) [Upload Docs](#) [Search Docs](#)

Envelope Subject:
Please sign docs for 123 Main Street

Signers:
Check the orange boxes of signers above.

Docs to Sign:
Check the yellow boxes of docs below.

[Cancel](#) [Send to DocuSign](#)

Label	Document Name	Added ...	Reviewed	Entered
Office Docs - visible to office staff				
<input type="checkbox"/>	Agreement	Sep 12, 2022	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Office Financial Disclosure	Aug 23, 2022	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Office Privacy Disclosure	Aug 23, 2022	<input type="checkbox"/>	<input type="checkbox"/>

4 Check the orange boxes next to your desired signers from the Agents and Contacts section above.

123 Main Street Added on Jun 30, 2022 by Hollis Holcomb
Last updated just now by Hollis Holcomb 407 Days on market

Listing Agents

- Elijah McCoy hollis+elijahm@paperlesspipeline.com 555-555-5555

Buying Agents

- John Jacob kristian+summary@paperlesspipeline.com (890) 123-4567

2 Contacts Order Added ▾ + Add Contact

- Leonardo, Buyer hollis+l@paperlesspipeline.com 555-555-5555 Turtle
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Stewart Closings

[Note / Email](#) [Add Contact](#) [Send to DocuSign](#) [Merge Docs](#) [Upload Docs](#) [Search Docs](#)

Envelope Subject:
Please sign docs for 123 Main Street

Signers:
John Jacob kristian+summary@paperlesspipeline.com
Leonardo hollis+l@paperlesspipeline.com

Docs to Sign:
Check the yellow boxes of docs below.

[Cancel](#) [Send to DocuSign](#)

Label	Document Name	Added ...	Reviewed	Entered
Office Docs - visible to office staff				
<input type="checkbox"/>	Agreement	Sep 12, 2022	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Office Financial Disclosure	Aug 23, 2022	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Office Privacy Disclosure	Aug 23, 2022	<input type="checkbox"/>	<input type="checkbox"/>

5 Click the yellow boxes next to the docs to send for signature.

Envelope Subject:
Please sign docs for 123 Main Street

Signers:
John Jacob kristian+summary@paperlesspipeline.com
Leonardo hollis+@paperlesspipeline.com

Docs to Sign:
Office Financial Disclosure
Office Privacy Disclosure

Cancel Send to DocuSign

<input type="checkbox"/>	Label	Document Name	Added	Reviewed	Entered
Office Docs - visible to office staff					
<input type="checkbox"/>		Agreement	Sep 12, 2022	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		Office Financial Disclosure	Aug 23, 2022	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		Office Privacy Disclosure	Aug 23, 2022	<input type="checkbox"/>	<input type="checkbox"/>
Listing Docs - visible to listing agents on this transaction and office staff					
<input type="checkbox"/>		Agreement (#2)	Feb 9, 2023	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		Keybox Authorization	Aug 23, 2022	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		Lead-based Paint Disclosure	Aug 23, 2022	<input type="checkbox"/>	<input type="checkbox"/>

6 Click [Send to DocuSign] to continue your request.

Envelope Subject:
Please sign docs for 123 Main Street

Signers:
John Jacob kristian+summary@paperlesspipeline.com
Leonardo hollis+@paperlesspipeline.com

Docs to Sign:
Office Financial Disclosure
Office Privacy Disclosure

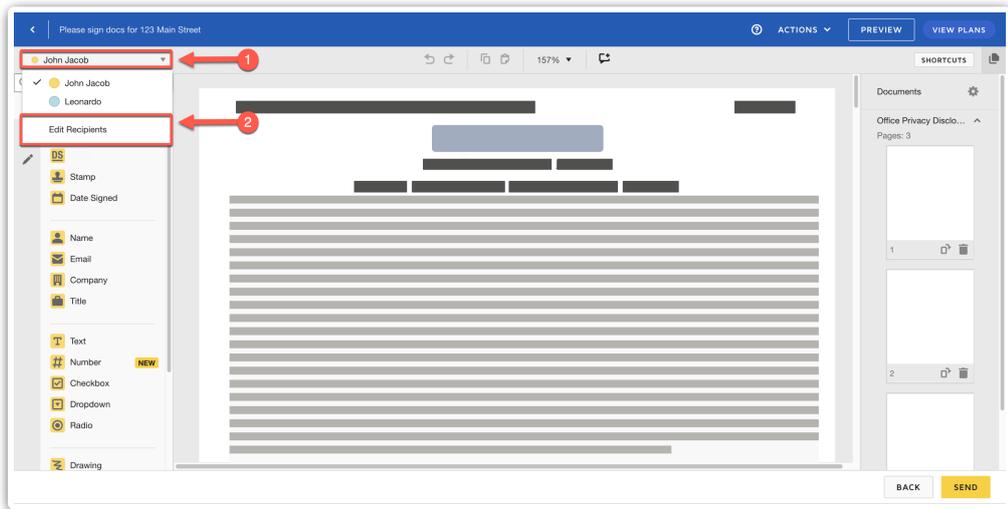
Cancel Send to DocuSign

<input type="checkbox"/>	Label	Document Name
Office Docs - visible to office staff		
<input type="checkbox"/>		Agreement
<input checked="" type="checkbox"/>		Office Financial Disclosure
<input checked="" type="checkbox"/>		Office Privacy Disclosure

7 Specify who should receive the DocuSign Envelope and what actions they should take.

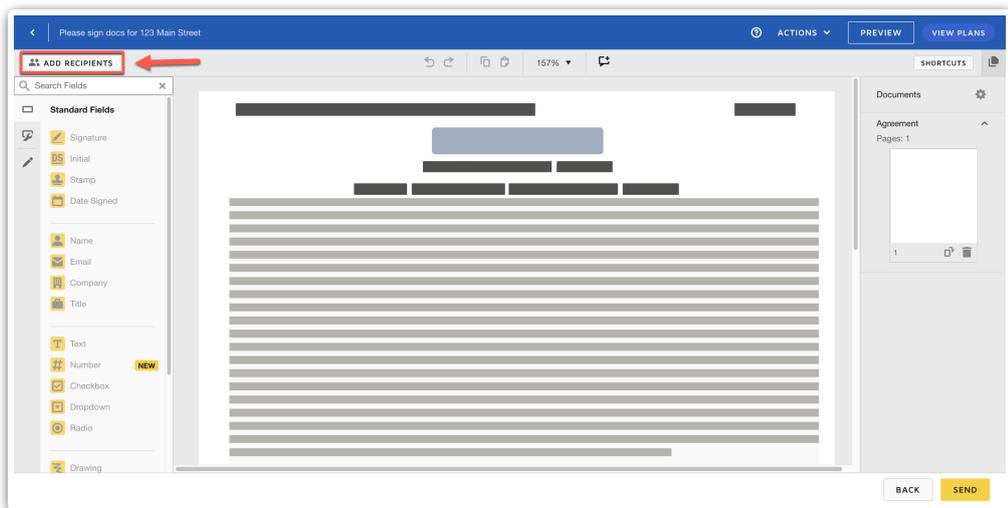
• **If you already selected recipients from the transaction:**

If needed, add more recipients or make changes to your preferences for recipients by clicking the dropdown for [Recipients] in the upper left corner, then [Edit Recipients].



- **If you did not select recipients from the transaction**

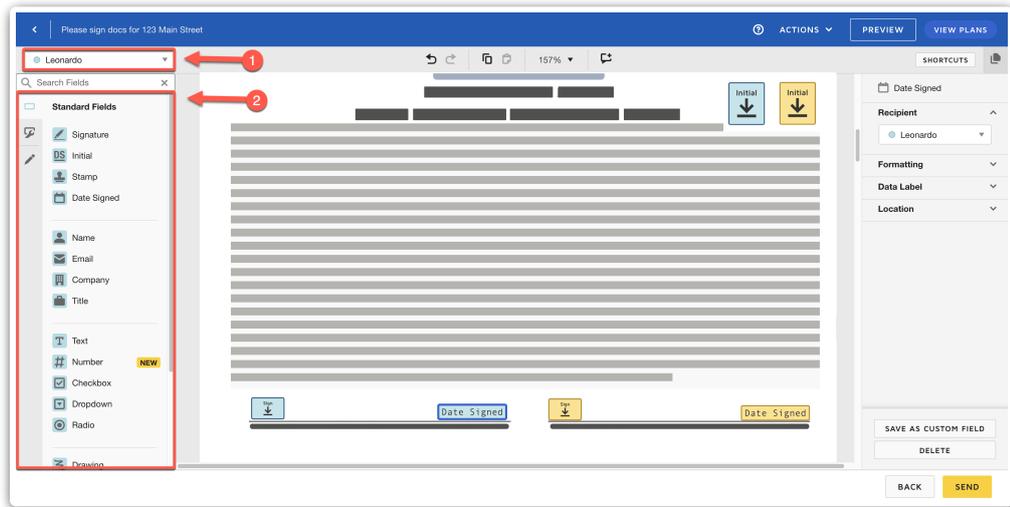
Add your desired recipients and set your preferences for them by clicking [Add Recipients].



8 Complete the request for each recipient:

- Select a recipient from the Recipients dropdown menu in the upper left corner.

- Drag and drop the signing fields and other information needed to your desired position within the docs.



9 Click [Send] when you have completed your request.



Once the signers complete your request, the executed document will appear automatically on the [Unassigned](#) page. At that point, the doc will be pre-assigned to the transaction and you can assign it like any other doc.

[Learn how to Assign Docs](#) →

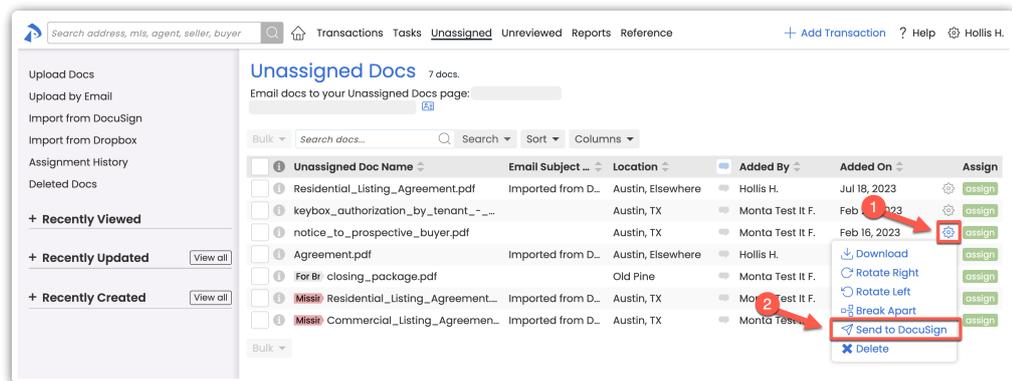
Send a Signature Request from Unassigned

Send a signature request from the *Unassigned* page via DocuSign and automatically receive executed docs back in Pipeline.

Who Can Do This? Anyone with a [DocuSign](#) account that is connected to Paperless Pipeline.

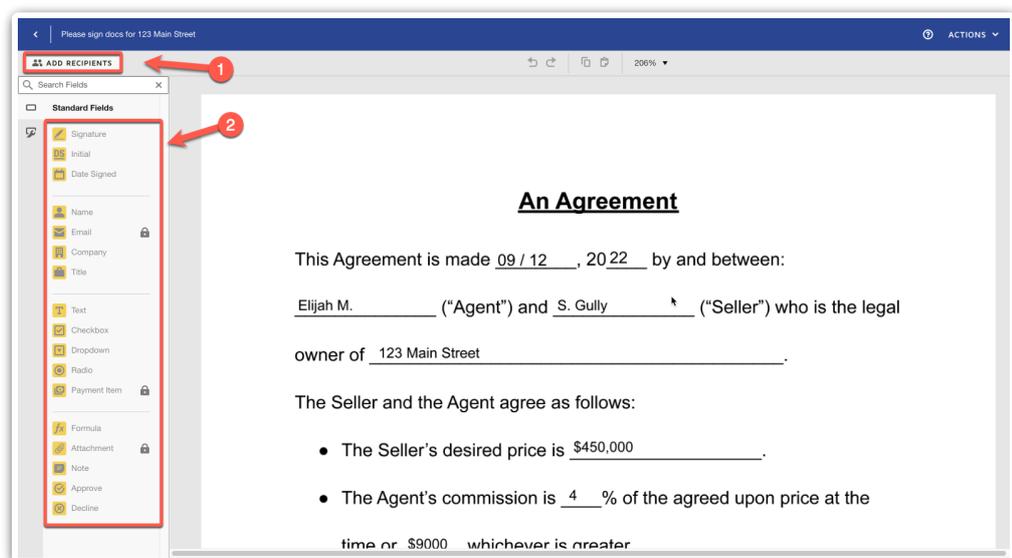
To send a DocuSign signature request from the *Unassigned* page:

- 1 Go to the **Unassigned** page by clicking [Unassigned] from the top menu.
- 2 Next to the doc you want to send for signature, click the [⚙️], then click [Send to DocuSign] and [Send] to confirm.



- 3 Complete the signature request:

- Click [Add Recipients] in the upper left corner to add your desired recipients.
- Drag and drop the signing fields and other information needed to your desired position within the docs.
- Repeat for each signer as needed.



- 4 Click [Send] when you have completed your request.

Once the signers complete your request, the executed document will appear automatically on the **Unassigned** page and you can assign it to a transaction like any other doc.

[Learn how to Assign Docs →](#)

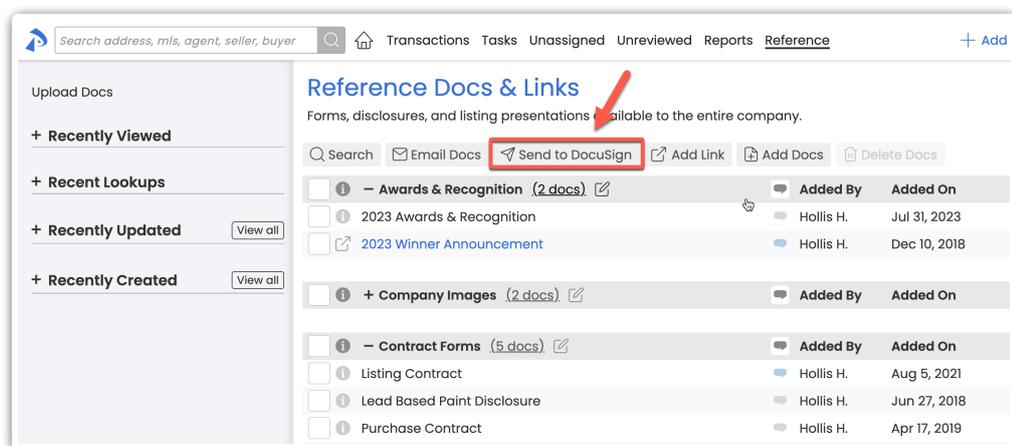
Send a Signature Request from Reference

Send a signature request from the *Reference* page via DocuSign and automatically receive executed docs back in Pipeline.

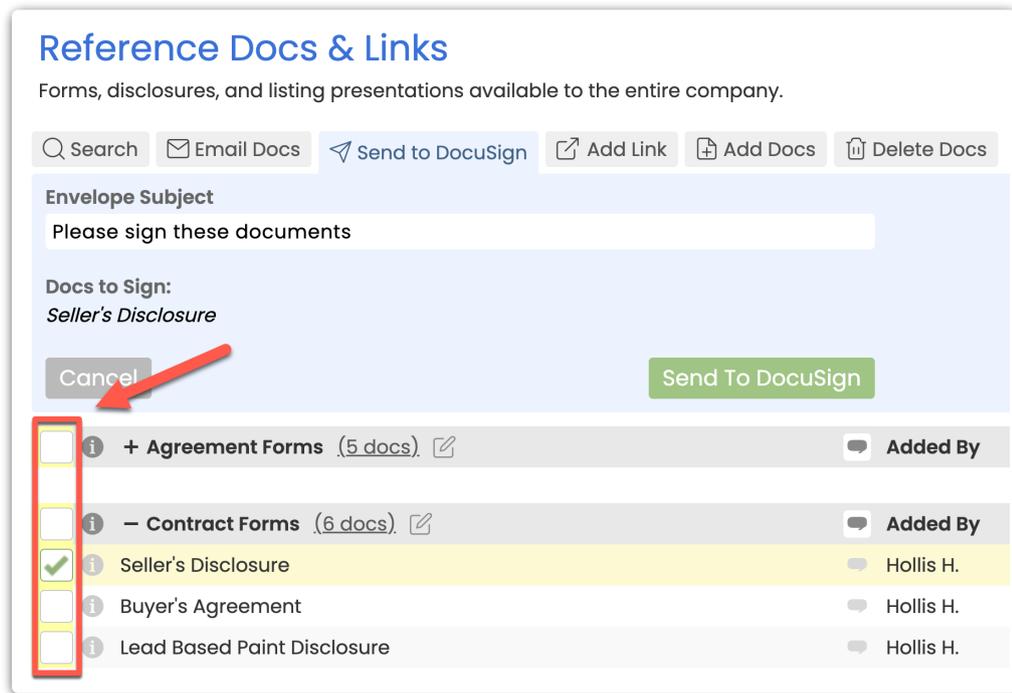
Who Can Do This? Anyone with a **DocuSign** account that is connected to Paperless Pipeline.

To send a DocuSign signature request from the *Reference* page:

- 1 Go to the **Reference page** by clicking [Reference] from the top menu.
- 2 Click [Send to DocuSign].

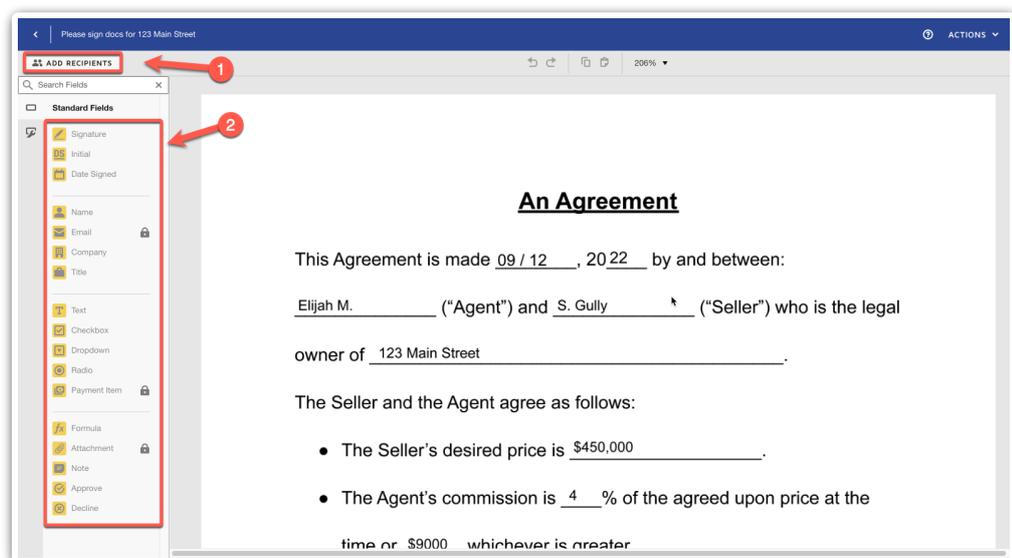


- 3 Check the yellow boxes next to the docs to send for signature, then click [Send to DocuSign].



4 Complete the signature request:

- Click [Add Recipients] in the upper left corner to add your desired recipients.
- Drag and drop the signing fields and other information needed to your desired position within the docs.
- Repeat for each signer as needed.



5 Click [Send] when you have completed your request.

Once the signers complete your request, the executed document will appear automatically on the [Unassigned](#) page and you can assign it to a transaction like any other doc.

[Learn how to Assign Docs →](#)

View Signed DocuSign Docs

View an executed signature request from the *Reference* page via DocuSign and automatically receive executed docs back in Pipeline.

Who Can Do This? Anyone with a [DocuSign](#) account that is connected to Paperless Pipeline.

Once the signers complete your request, the executed document will appear automatically on the [Unassigned](#) page and you can assign it to a transaction like any other doc. [Learn how to Assign Docs →](#)