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:



2 Click [Send to DocuSign] below the sections for Agents and Contacts.

Search address, mls, agent, seller, buyer	0	Transactions Tasks Unassigned	Unreviewed Reports Reference	+ Add Trar	nsaction ? Help	Hollis H.
Send Offer to Seller @agent Seller Accepted Offer @admin Seller Rejected Offer @admin	7/20	123 Main Street	Added on Oct 7, 2022 by Hollis Holcomb Last updated just now by Hollis Holcomb		2 Day acce	ys since eptance
	//30	Listing Agents ()				
Add doc hame of task		BeeBe Bluff				
		Doug Funnie (outside)				
		– 1 Contact 💿		Order Adde	d 👻 + Ad	ld Contact
		Susan Smyrna, Escrow			8	
		🖂 Note / Email 🛛 음• Add Conta	act 🛛 🛛 Send to DocuSign 🖁 🖁 Merge I	Docs	🔒 🔍 Se	earch Docs
		🚺 Label) Document Name 🗘		I Added 🗘 R	eviewed 🗘 🛛 Ente	red ‡
		- Listing Docs - visible to listing ag	gents on this transaction and office staff			
		Addendum		Feb 6, 2023		
		Addendum 2		Feb 6, 2023		٢
		Listing Agreement		Feb 6, 2023		©
		Listing Package		Feb 6, 2023		٢
		Seller Agreement		Feb 6, 2023	 Image: A set of the set of the	0
		- Sale Docs - visible to listing and	buying agents on this transaction and office sto	aff		
		Sales Disclosure		Feb 6, 2023		0
		Notes & Sent Emails			▼ ○ Se	arch Notes

3 Enter an Envelope Subject to name the DocuSign Envelope.

123 Main Street	ed on Jun 30, 2022 by Hollis Holcomb 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 Contac
Leonardo, Buyer Pizza Co / 123 Pizza	hollis+l@paperlesspipeline.com	🗋 555-555-5555 🛛 🖨 Tur	tle
Jack Stewart, Attorney Stewart Closings	hollis+try@paperlesspipeline.com	. 585-380-4520	
Note / Email A+ Add Contact Envelope Subject: Please sign docs for 123 Main Stree	≪ Send to DocuSign 등 Merge Docs ♪ Upload Docs 은		Q Search Doo
Signers: Check the orange boxes of signers a	ibove.		
Docs to Sign: Check the yellow boxes of docs belo	w.		
Cancel	Send to DocuSign		
🚺 Label) Document Name 🗘		Added	i 🗘 Entered 🗘
- Office Docs - visible to office staff			
 Agreement 		Sep 12, 2022	
Office Financial Disclosure		 Aug 23, 2022 	
Office Privacy Disclosure		Aug 23, 2022	- 4

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

23 Main Street Added on Jun 30, 2022 by Hollis Holcomb Last updated just now by Hollis Holcomb						
Listing Agents 💿						
Elijah McCoy	hollis+elijahm@paperlesspipeline.com	<u>555-555-5555</u>				
Buying Agents 💿						
John Jacob	kristian+summary@paperlesspipeline.com	. (890) 123-4567				
- 2 Contacts 💿		Order Added	+ Add Contac			
Leonardo, Buyer Pizza Co / 123 Pizza	hollis+l@paperlesspipeline.com	. 555-555-5555 🕀	Turtle			
Jack Stewart, Attorney Stewart Closings	hollis+try@paperlesspipeline.com	585-380-4520				
Mote / Email Add Contact <	🛿 Send to DocuSign 🖁 Herge Docs 🔿 Upload Docs	i l	Q Search Doo			
Envelope Subject: Please sign docs for 123 Main Street						
Signers: John Jacob <u>kristian+summary@paper</u> Leonardo <u>hollis+!@papertesspipeline.cc</u> Docs to Sign: <u>Check the yellow boxes of docs below.</u>	lesspipeline.com pm					
Cancel	Send to DocuSign					
1 Label Document Name 🗘		Added	wed 🗘 Entered 🗘			
- Office Docs - visible to office staff						
Agreement		Sep 12, 2022				
Office Financial Disclosure		Aug 23, 2022				
Office Privacy Disclosure		Aug 23, 2022				

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

☑ Note / Email At Add Contact 夕 Send to DocuSign 묘 Merg	je Docs 🕂 Upload Docs 🔓	Q Search Docs
Envelope Subject:		
Please sign docs for 123 Main Street		
Signers: John Jacob <u>kristian+summary@paperlesspipeline.com</u> Leonardo <u>hollis+l@paperlesspipeline.com</u> Docs to Sign: Office Financial Disclosure Office Fivacy Disclosure		
Cancel Send	to DocuSign	
🚺 [labə]) Document Name 🗘	Added	d 🗢 Reviewed 🗢 Entered 🗢
 Office Docs – visible to office staff 		
1 Agreement	Sep 12	, 2022
🕑 🕕 Office Financial Disclosure	 Aug 2 	3, 2022 📄 🔅
Office Privacy Disclosure	 Aug 2 	3, 2022 📄 🔅
- Listing Docs - visible to listing agents on this transaction and office staff		
Agreement (#2)	🗢 Feb 9,	2023
Keybox Authorization	Aug 2	3, 2022
🔲 🕕 Lead-based Paint Disclosure	Aug 2	3, 2022

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

🖂 Note / Email 🛛 🖧 Add Contact	🔊 Send to DocuSign	Derge Docs	🛧 Upload Docs 🔓			
Envelope Subject:						
Please sign docs for 123 Main Stree	t					
Signers: John Jacob kristian+summary@paperlesspipeline.com Leonardo hollis+1@paperlesspipeline.com Docs to Sign: Office Financial Disclosure Office Privacy Disclosure Cancel						
🚺 🚺 Document Name 🗘						
- Office Docs - visible to office staff						
Agreement						
Office Financial Disclosure						
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].

Please sign docs for 123 Main Street		ACTIONS PREVIEW VIEW PLAN
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Company		
💼 Title		
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Checkbox		
Dropdown		
Radio		
2 Drawing		

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.

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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 \rightarrow

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.

Upload Docs		Una	issigned Docs	7 docs.						
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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.

<	Please sign docs for 123	ain Street	0	actions 🗸
1	ADD RECIPIENTS	<u>→</u> 1 5 c 6 6 206% •		
Q S	earch Fields			
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	💄 Name	An Agreement		
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	💼 Title	······································		
		Flijah M ("Agent") and S Gully ("Seller") who is the legal		
	T lext			
	Dropdown	sum an af 122 Main Street		
	Radio	Owner of 123 Main Street		
	🖸 Payment Item 🔒			
		The Seller and the Agent agree as follows:		
	fx Formula			
	🔗 Attachment 🛛 🔒	 The Seller's desired price is \$450,000 		
	D Note			
	Ø Approve	• The Agent's commission is 4 % of the agreed upon price at the		
	🛞 Decline			
		time or \$9000 whichever is areater		

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 \rightarrow

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].

Search address, mls, agent, seller, buy	er Q fransactions Tasks Unassigned Unreviewed R	eports <u>Reference</u> + Add
Upload Docs	Reference Docs & Links	tire company.
+ Recently Viewed	Q Search 🗹 Email Docs 🖪 Send to DocuSign 🗗 Add Lin	nk 🕒 Add Docs 🔟 Delete Docs
+ Recent Lookups	Awards & Recognition (2 docs)	Added By Added On
	1 2023 Awards & Recognition	🖤 🛑 Hollis H. 🛛 Jul 31, 2023
r Recently opdated	2023 Winner Announcement	Hollis H. Dec 10, 2018
+ Recently Created View all	+ Company Images (2 docs)	Added By Added On
	Contract Forms (5 docs)	Added By Added On
	Listing Contract	 Hollis H. Aug 5, 2021
	Lead Based Paint Disclosure	 Hollis H. Jun 27, 2018
	Purchase Contract	 Hollis H. Apr 17, 2019

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

Reference Docs & Links Forms, disclosures, and listing presentations available to the entire company.							
Q Search	🗠 Email Docs	🔊 Send to DocuSign	🖸 Add Link	Add Docs	ا ال	Delete Docs	
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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.

۰	Please sign docs for	123 Main Street		⑦ ACTIONS ➤
.	ADD RECIPIENTS	+	୍ର ଅଟେ କ	
Q S	earch Fields	×		
	Standard Fields			
F	Signature		2	
	DS Initial			
	Date Signed			
	-		An Agreement	
	💄 Name		An Agreement	
	🔛 Email	8		
	Company		This Agreement is made 09/12 2022 by and between:	
	💼 Title			
		- 1	Fliish M ("Agent") and S Gully ("Coller") who is the legal	
	T Text		(Seller) who is the legal	
	Checkbox			
	Dropdown		owner of 123 Main Street	
	Radio	~		
	Payment Item		The Seller and the Agent agree as follows:	
	for Formula			
	Attachment	A	• The Seller's desired price is \$450,000	
	Note	-	• The Seller's desired price is	
	Approve			
	Decline		 The Agent's commission is <u>4</u>% of the agreed upon price at the 	
			time or \$9000 whichever is greater	
			time or \$9000 whichever is greater	

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 \rightarrow

View Signed DocuSign Docs

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

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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 docLearn how to Assign Docs \rightarrow