Getting Started with Pipeline eSign

Early Access

Pipeline eSign is in early access, which means you're getting a sneak peek before it's widely released. Want to try it out? Contact us!

Try Pipeline eSign for free and see how easy it is to send secure, legally binding signatures in Paperless Pipeline. Then, when you're ready, activate your plan to enable signature requests for your whole team.

Introduction

Getting started with Pipeline eSign is quick and easy. There's nothing new to log into, no extra tools, and no need to change how your team works.

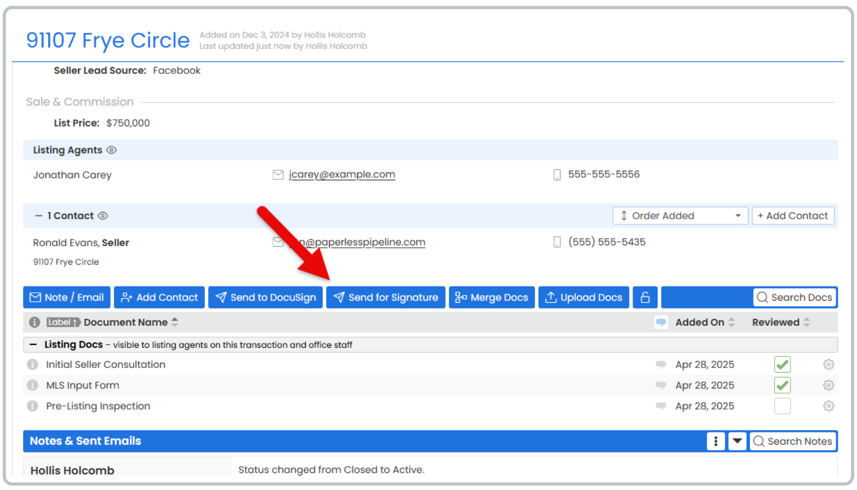
Once activated, your team can start sending requests instantly. Everything stays within Pipeline from start to finish.

Try It Free

Send your first two signature requests free with Pipeline eSign.

Who Can Do This: Master Admins.

To send a free signature request, click [Send for Signature] from a transaction or the Reference page to see how it works.



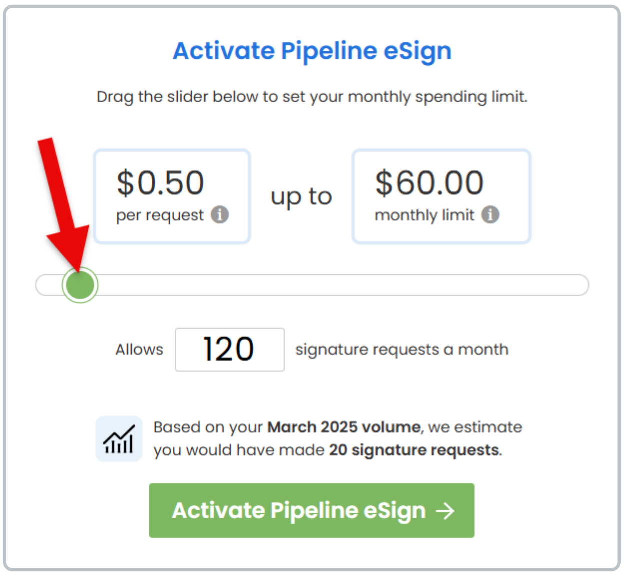
Activate Pipeline eSign

Once you're ready to activate eSign for your whole team, set a monthly spending limit that fits your team's size and pace.

Who Can Do This: Master Admins.

To activate Pipeline eSign:

1. **Go to Your Pipeline eSign Page**
   - Click your name in the upper right, then select [Admin / Settings].
   - From the left menu, select [Pipeline eSign] under *Add-On Modules*.
2. **Choose Your Company's Limit**
   - Drag the slider to set your max monthly budget based on the number of signature requests you want to allow.
   - If you need more than 2,000 signature requests per month, type the amount.



3. **Activate eSign**
   - Click [Activate Pipeline eSign →].
   - Review billing details, then click [Add Document Signing] to activate your eSign plan.

Learn more about your Pipeline eSign plan.

Set Up Pipeline eSign

No setup is required to start using Pipeline eSign. Once activated, your team can begin sending signature requests right away.

A few optional steps can make the process even smoother:

- **Tune Up Your Doc Settings**: Make sure your Doc Labels and Doc Names are optimized for signed docs.
- **Get Your Reference Library Ready**: Add frequently signed docs to your Reference Library so your team can access them quickly.
- **Create Reusable Templates**: Set up Forms to turn frequently signed docs into smart templates that autofill with transaction and signer details.

Use Pipeline eSign

Send, track, and manage signature requests with ease. Pipeline eSign supports every stage of your team's signing workflow with a flexible plan, reusable form templates, and built-in tools.

Learn how to Use Pipeline eSign