Send Signature Requests

With Pipeline eSign, send fast, secure, and reliable signature requests. Documents flow smoothly from Paperless Pipeline to your signers and come back automatically, signed and ready to go.

Introduction

Send secure, reliable signature requests without leaving Paperless Pipeline or interrupting your existing workflow.

Start from a transaction to automatically pull in key details and keep everything tracked in the audit trail. Or use the Reference Library for a quick, flexible option that doesn't need to be tied to a specific transaction.

For each request, add signers, drag fields exactly where they're needed, and insert fields that autofill transaction information to save time and reduce errors. Customize the signing experience by setting a signing order, adding CCs, and including a personal message.

Each request goes out with a secure link and can be signed from any device. Once completed, the signed document is automatically returned to Paperless Pipeline in Unassigned Docs, ready to be assigned like any other doc.

How It Works

Pick Your Starting Point

Start from a transaction to automatically pull in key details and keep everything tracked in the audit trail. Or use the Reference Library for a quick, flexible option that doesn't need to be tied to a specific transaction.

Choose Docs and Signers

Choose the documents that need to be signed and who needs to sign them. You can select agents, assistants, contacts, or outside parties, whatever the deal calls for.

Each signature request can contain any number of docs, signers, and signatures.

Place the Fields

Choose what information should be displayed on the doc and what the signer needs to enter.

Let the system fill in important details from the transaction to save time and avoid mistakes.

Send with Confidence

Set a signing order if needed, add CCs, and include a personal message. After you click send, Pipeline takes care of the rest.

A Smooth Signing Experience

Signers get a secure link with just the fields they need to fill out. It's a smooth, straightforward experience that works on any device.

Get Signed Docs Back Instantly

Once all parties have signed, the signed document is automatically returned to Paperless Pipeline in Unassigned Docs, ready to be assigned like any other doc.

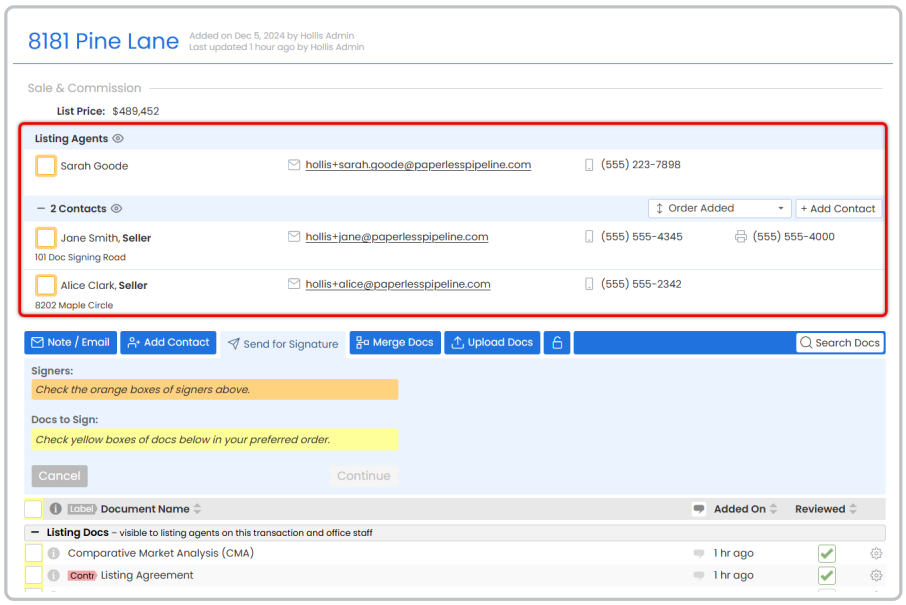
Send a Signature Request from Transactions

Send a signature request directly from a transaction to choose signers effortlessly, have transaction details autofilled, and keep everything tracked in the transaction's audit trail.

Who Can Do This: Anyone whose company is subscribed to Pipeline eSign.

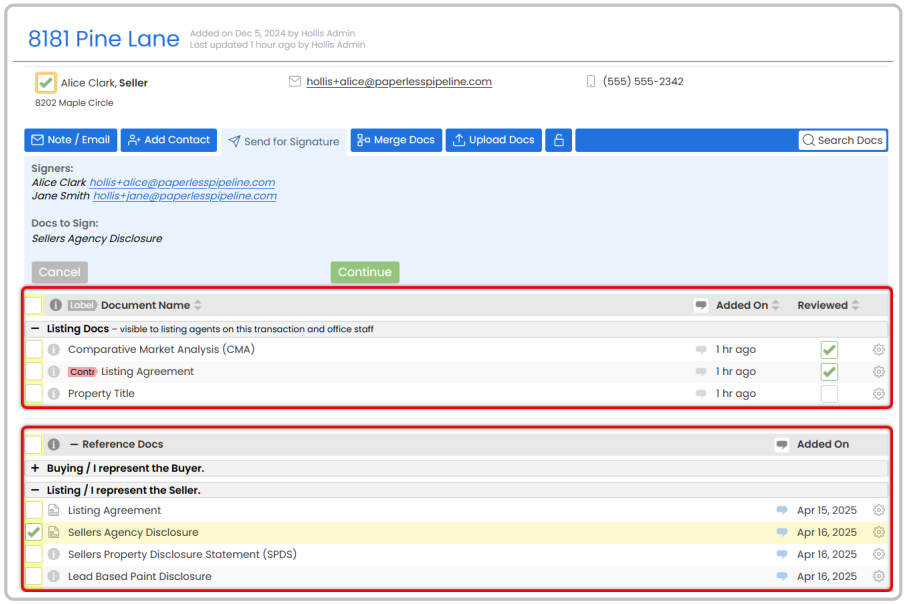
To send a signature request from a transaction:

1. **Go to the Transaction**
   - Open the transaction where signatures are needed.
2. **Start the Signature Request**
   - Click [Send for Signature] from the action bar on the transaction.
3. **Select Signers**
   - Check boxes next to people who need to sign from the *Agents* or *Contacts* area.

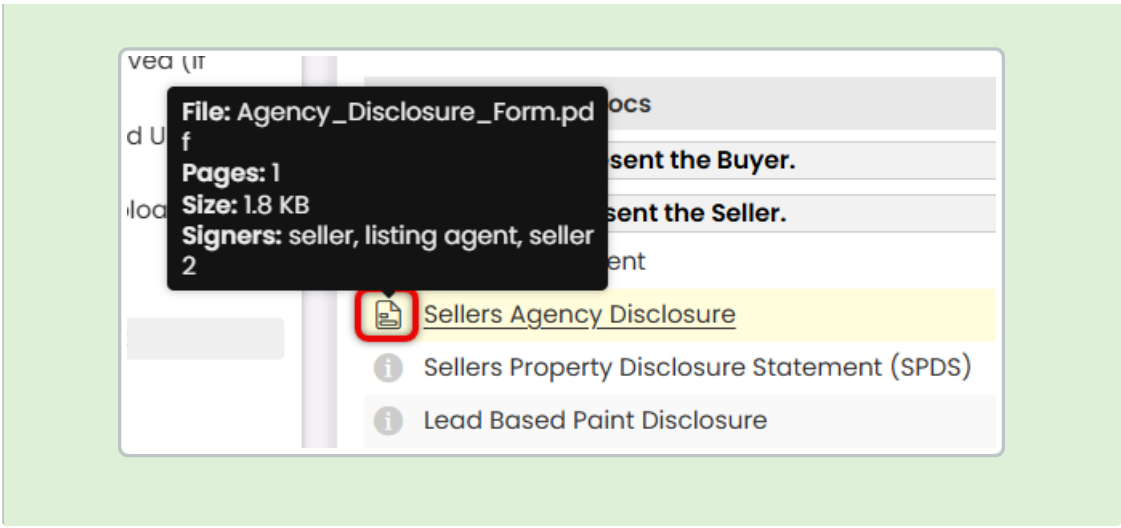


4 Select Docs to be Signed

- Check boxes next to the docs you want to include in the request. Choose from the list of transaction documents or *Reference Docs*.
- Click [Continue] to initiate the request.

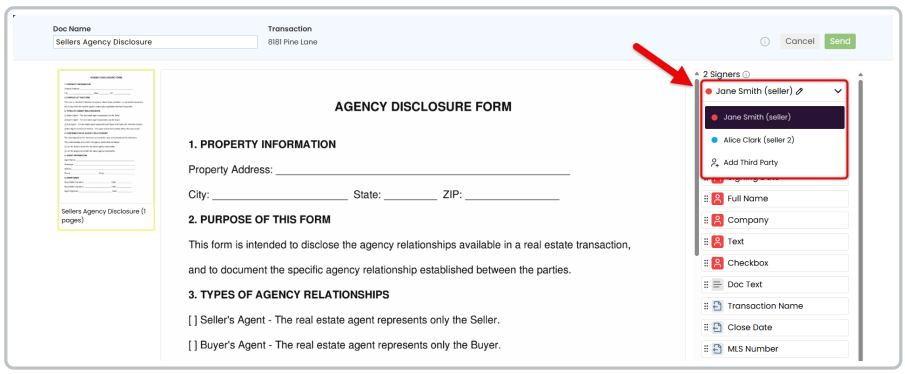


If a doc in your Reference Library has a form, you'll see a form icon in the "i" column. Hover over it to instantly view document information, including signers and page count.



5 Select a Signer

- Choose the first person who will sign using the *Signers* dropdown in the right menu.



6 Place Fields for the Signer

- If you're sending a Form, confirm the fields that have already been placed. If needed, make any necessary adjustments.
- Drag the necessary fields onto the doc from the *Fields* section on the right (outlined below).

Autofilled Transaction Info

Insert **Transaction Info** fields to automatically pull key details directly from the transaction, like *Transaction Name*, *Listing Date*, and *Buyer Name(s)*.

Document Text

Insert **Document Text** to fill in any standard details you're responsible for entering, such as disclaimers or other required text.

Signer Fields

Insert fields the signer is responsible for completing:**Signature**, **Initials**, and **Signing Date**.

Flexible Fields

Insert flexible fields that can be completed by either you or signer(s), depending on who has the information.

- Add **Full Name** and **Company** fields to automatically pull the signer's details directly from the transaction.
- Add a **Text** field when you need a space for the signer to fill in custom information.
- Add a **Checkbox** for any items that may require a signer's checkmark.

7 Repeat for Additional Signers

- Use the *Signers* dropdown to select any additional signers, one at a time.
- Place only the fields that apply to the selected signer.

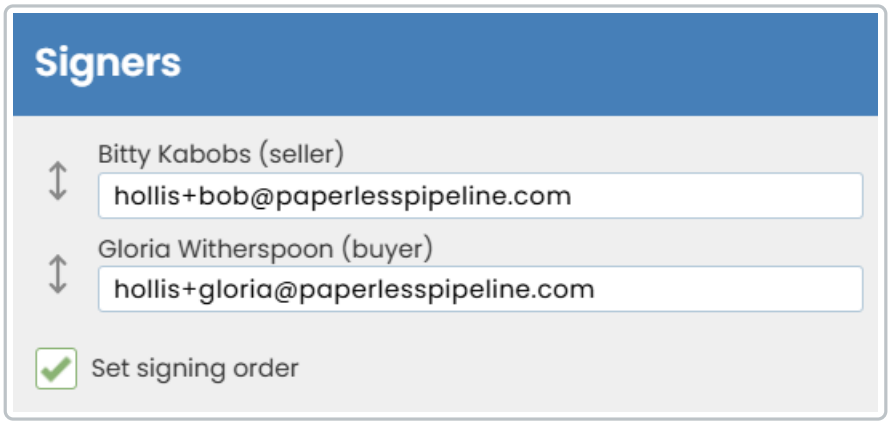
8 Confirm & Customize Request

- When the doc is finalized, click [Send] in the upper right corner.
- Optionally, customize the signing flow, include non-signers, or add a personal message (outlined below).

Signing Order

If signers need to complete the request in a specific order, check the option to [Set

Signing Order] and drag signers into the correct sequence.



Subject

Customize the email subject to reflect the docs to be signed, or leave as is.

CC

If anyone who isn't signing needs to receive a copy of the signed doc, enter their email address(es).

Message

Add a short note or instructions to appear in the body of the email your recipients receive.

9 **Send the Request**

- Click [Send Request]. Signers will get a secure link to review and sign from any device.
- When all signatures are complete, a final copy will be automatically added to Unassigned Docs. A final copy will also be emailed to you and all recipients.

Send a Signature Request from Reference

Send a signature request from the Reference Library to request a signature that isn't tied to a specific transaction.

Who Can Do This: Anyone whose company is subscribed to Pipeline eSign.

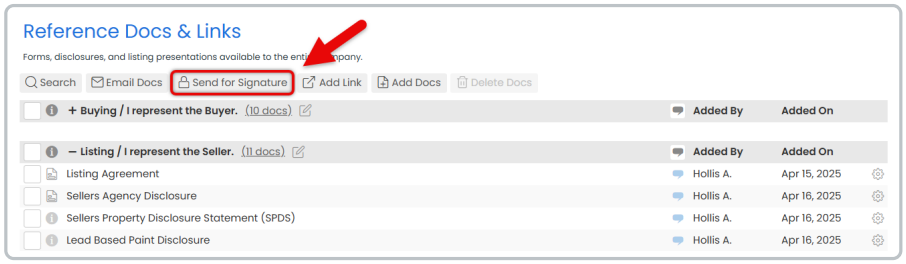
To send a signature request from the Reference Library:

1 **Go to Your Reference Library**

- Click [Reference] from the top menu.

2 **Start the Signature Request**

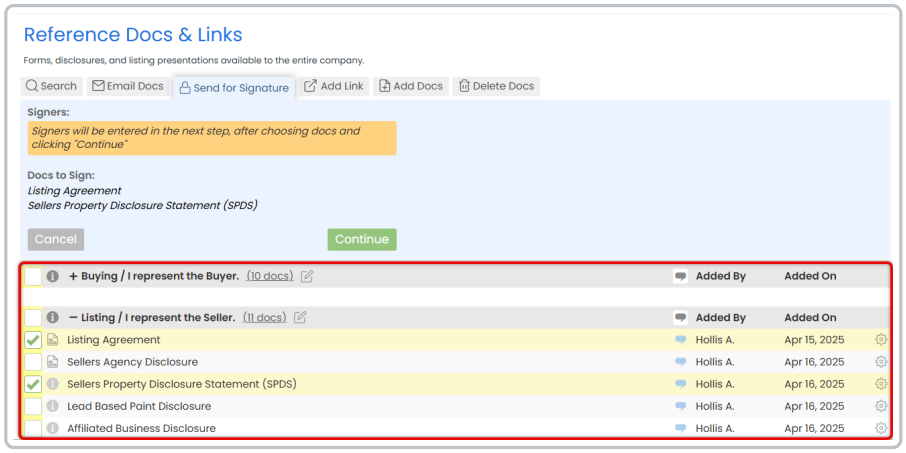
- Click [Send for Signature] at the top of the page.



3 **Select Docs to be Signed**

- Check boxes next to the docs you want to include in the request.

- Click [Continue] to start preparing the request.



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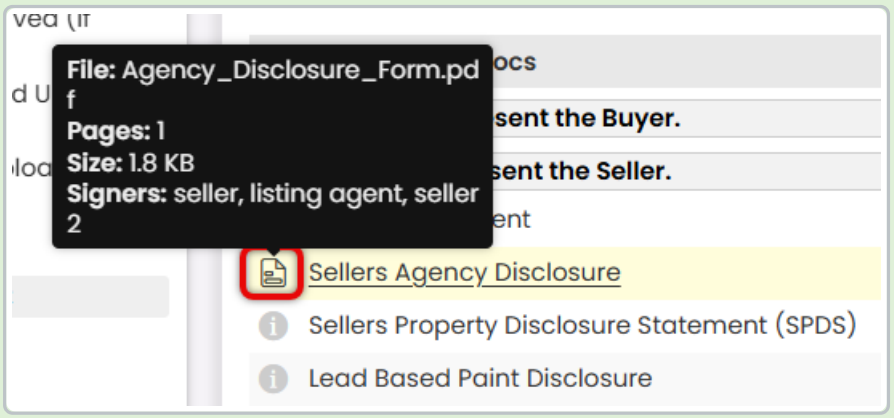

4 Select a Signer

- Choose the first person who will sign using the*Signers* dropdown in the right menu.

5 Place Fields for the Signer

- If you're using a Form, confirm the prefilled details and place any additional fields needed.
- Drag the necessary fields onto the doc from the *Fields* section on the right (outlined below).

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- Add a **Checkbox** to require the signer to agree to something or confirm they've seen it.

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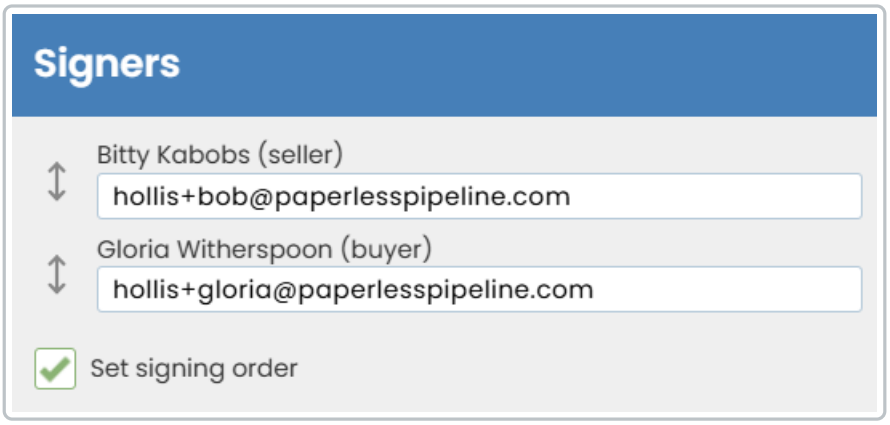

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What Signers See

Manage Signature Requests

Learn how to Manage Signature Requests