

# 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.

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## 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.

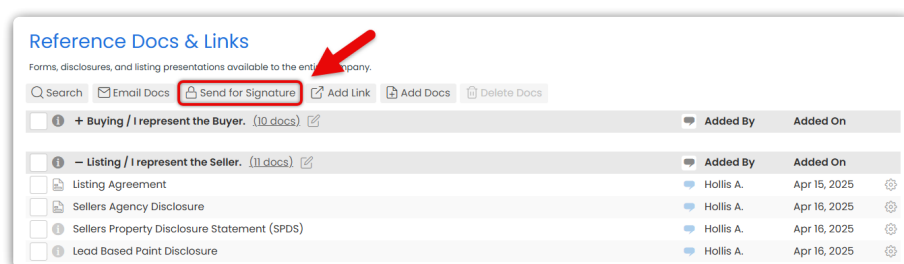
## Send a Signature Request from Reference

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.

**Reference Docs & Links**  
Forms, disclosures, and listing presentations available to the entire company.

Search | Email Docs | Send for Signature | Add Link | Add Docs | Delete Docs

**Signers:**  
Signers will be entered in the next step, after choosing docs and clicking "Continue"

**Docs to Sign:**  
Listing Agreement  
Sellers Property Disclosure Statement (SPDS)

Cancel | Continue

	Added By	Added On
<input type="checkbox"/> + Buying / I represent the Buyer. (10 docs)		
<input type="checkbox"/> - Listing / I represent the Seller. (11 docs)		
<input checked="" type="checkbox"/> Listing Agreement	Hollis A.	Apr 15, 2025
<input type="checkbox"/> Sellers Agency Disclosure	Hollis A.	Apr 16, 2025
<input checked="" type="checkbox"/> Sellers Property Disclosure Statement (SPDS)	Hollis A.	Apr 16, 2025
<input type="checkbox"/> Lead Based Paint Disclosure	Hollis A.	Apr 16, 2025
<input type="checkbox"/> Affiliated Business Disclosure	Hollis A.	Apr 16, 2025



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.

**File:** Agency\_Disclosure\_Form.pdf  
**Pages:** 1  
**Size:** 1.8 KB  
**Signers:** seller, listing agent, seller 2

☒ Sellers Agency Disclosure

☐ Sellers Property Disclosure Statement (SPDS)

☐ Lead Based Paint Disclosure

### 4 Select a Signer

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

Doc Name: Sellers Agency Disclosure

Transaction: 8181 Pine Lane

### AGENCY DISCLOSURE FORM

**1. PROPERTY INFORMATION**

Property Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

**2. PURPOSE OF THIS FORM**

This form is intended to disclose the agency relationships available in a real estate transaction, and to document the specific agency relationship established between the parties.

**3. TYPES OF AGENCY RELATIONSHIPS**

☐ Seller's Agent - The real estate agent represents only the Seller.

☐ Buyer's Agent - The real estate agent represents only the Buyer.

**2 Signers**

- Jane Smith (seller)
- Alice Clark (seller 2)
- Add Third Party

Full Name

Company

Text

Checkbox

Doc Text

Transaction Name

Close Date

MLS Number

## 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).

## 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)*.

Doc Name: Listing Agreement

Transaction: 8181 Pine Lane

### EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT

**I. The Parties.** This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on \_\_\_\_\_, 20\_\_\_\_, is between:

**Seller:** \_\_\_\_\_ ("Seller") with a mailing address of \_\_\_\_\_, City of \_\_\_\_\_, State of \_\_\_\_\_

AND

**Agency:** \_\_\_\_\_ ("Broker") of \_\_\_\_\_ ("Agency") with a mailing address of \_\_\_\_\_, City of \_\_\_\_\_, State of \_\_\_\_\_. Collectively, the Seller and Agency shall be referred to as the "Parties".

If for any reason the Broker is not able to fulfill their duties under the terms and conditions of this

Signing Date

Full Name

Company

Text

Checkbox

Doc Text

Transaction Name

Close Date

MLS Number

Listing Date

Expiration Date

Acceptance Date

List Price

Sale Price

Buyer Name(s)

Seller 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.

Doc Name  
Listing Agreement

Cancel Save Form

**EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT**

I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on \_\_\_\_\_, 20\_\_\_\_, is between:

Seller: \_\_\_\_\_ ("Seller") with a mailing address of \_\_\_\_\_, City of \_\_\_\_\_, State of \_\_\_\_\_

Signing Date  
Full Name  
Company  
Text  
Checkbox  
Doc Text  
Transaction Name  
Close Date

## Signer Fields

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

Doc Name  
Listing Agreement

Cancel Save Form

**EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT**

I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on \_\_\_\_\_, 20\_\_\_\_, is between:

Seller: \_\_\_\_\_ ("Seller") with a mailing address of \_\_\_\_\_

Signers  
seller

Fields  
Signature  
Initials  
Signing Date  
Full Name  
Company

## 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 flexible space for the signer to fill in custom information.
- Add a **Checkbox** to require the signer to agree to something or confirm they've seen it.

Doc Name  
Listing Agreement

Cancel Save Form

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I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on \_\_\_\_\_, 20\_\_\_\_, is between:

Seller: \_\_\_\_\_ ("Seller") with a mailing address of \_\_\_\_\_, City of \_\_\_\_\_, State of \_\_\_\_\_

AND

Signers  
seller

Fields  
Signature  
Initials  
Signing Date  
Full Name  
Company  
Text  
Checkbox  
Doc Text  
Transaction Name

## 6 Repeat for Additional Signers

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

Doc Name  
Listing Agreement

Cancel Save Form

**EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT**

I, The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on \_\_\_\_\_, 20\_\_\_\_, is between:

Seller: \_\_\_\_\_ ("Seller") with a mailing address of \_\_\_\_\_, City of \_\_\_\_\_, State of \_\_\_\_\_

AND

Signers  
seller

Fields  
Signature  
Initials  
Signing Date  
Full Name  
Company  
Text  
Checkbox  
Doc Text  
Transaction Name

## 7 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.

**Signers**

↑↓ Bitty Kabobs (seller)  
hollis+bob@paperlesspipeline.com

↑↓ Gloria Witherspoon (buyer)  
hollis+gloria@paperlesspipeline.com

☒ Set signing order

### Subject

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

Subject

Sign Docs for: 9062 Birch Way - Counter Offer

## CC

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

CC (will receive signed doc)

hollis+agent@paperlesspipeline.com

*Enter email addresses*

## Message

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

Message (optional)

Hi,  
Please review and sign the attached Counter Offer.

Cancel

Send Now

### 8 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 emailed to you and all recipients. It will also be automatically added to Unassigned Docs, ready to assign 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.

8181 Pine Lane Added on Dec 5, 2024 by Hollis Admin  
Last updated 1 hour ago by Hollis Admin

Sale & Commission

List Price: \$489,452

**Listing Agents**

☐ Sarah Goode [hollis+sarah.goode@paperlesspipeline.com](mailto:hollis+sarah.goode@paperlesspipeline.com) (555) 223-7898

**2 Contacts** [Order Added](#) [+ Add Contact](#)

☐ Jane Smith, **Seller** [hollis+jane@paperlesspipeline.com](mailto:hollis+jane@paperlesspipeline.com) (555) 555-4345 (555) 555-4000  
101 Doc Signing Road

☐ Alice Clark, **Seller** [hollis+alice@paperlesspipeline.com](mailto:hollis+alice@paperlesspipeline.com) (555) 555-2342  
8202 Maple Circle

[Note / Email](#) [Add Contact](#) [Send for Signature](#) [Merge Docs](#) [Upload Docs](#) [Search Docs](#)

**Signers:**  
Check the orange boxes of signers above.

**Docs to Sign:**  
Check yellow boxes of docs below in your preferred order.

[Cancel](#) [Continue](#)

Document Name	Added On	Reviewed
<b>Listing Docs</b> – visible to listing agents on this transaction and office staff		
<input type="checkbox"/> Comparative Market Analysis (CMA)	1 hr ago	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Listing Agreement	1 hr ago	<input checked="" type="checkbox"/>

**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.



8181 Pine Lane Added on Dec 5, 2024 by Hollis Admin  
Last updated 1 hour ago by Hollis Admin

☒ Alice Clark, Seller  
8202 Maple Circle

☐ hollis+alice@paperlesspipeline.com (555) 555-2342

[Note / Email](#) [Add Contact](#) [Send for Signature](#) [Merge Docs](#) [Upload Docs](#) [Lock](#)

Signers:  
Alice Clark [hollis+alice@paperlesspipeline.com](mailto:hollis+alice@paperlesspipeline.com)  
Jane Smith [hollis+jane@paperlesspipeline.com](mailto:hollis+jane@paperlesspipeline.com)

Docs to Sign:  
Sellers Agency Disclosure

[Cancel](#) [Continue](#)


Document Name	Added On	Reviewed
- Listing Docs - visible to listing agents on this transaction and office staff		
Comparative Market Analysis (CMA)	1 hr ago	<input checked="" type="checkbox"/>
<b>icon</b> Listing Agreement	1 hr ago	<input checked="" type="checkbox"/>
Property Title	1 hr ago	<input type="checkbox"/>


Reference Docs	Added On
+ Buying / I represent the Buyer.	
- Listing / I represent the Seller.	
Listing Agreement	Apr 15, 2025
<input checked="" type="checkbox"/> Sellers Agency Disclosure	Apr 16, 2025
Sellers Property Disclosure Statement (SPDS)	Apr 16, 2025
Lead Based Paint Disclosure	Apr 16, 2025




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File: Agency\_Disclosure\_Form.pdf  
Pages: 1  
Size: 1.8 KB  
Signers: seller, listing agent, seller  
2

 Sellers Agency Disclosure

 Sellers Property Disclosure Statement (SPDS)

 Lead Based Paint Disclosure

## 5 Select a Signer

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

Doc Name: Sellers Agency Disclosure

Transaction: 8181 Pine Lane

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**3. TYPES OF AGENCY RELATIONSHIPS**  
☐ Seller's Agent - The real estate agent represents only the Seller.  
☐ Buyer's Agent - The real estate agent represents only the Buyer.

**2 Signers**  
 Jane Smith (seller)  
 Alice Clark (seller 2)  
 Add Third Party

Full Name  
 Company  
 Text  
 Checkbox  
 Doc Text  
 Transaction Name  
 Close Date  
 MLS Number

## 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)*.

Doc Name: Listing Agreement

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AND

**Agency:** \_\_\_\_\_ ("Broker") of \_\_\_\_\_ ("Agency") with a mailing address of \_\_\_\_\_, City of \_\_\_\_\_, State of \_\_\_\_\_. Collectively, the Seller and Agency shall be referred to as the "Parties".

If for any reason the Broker is not able to fulfill their duties under the terms and conditions of this

Signing Date  
 Full Name  
 Company  
 Text  
 Checkbox  
 Doc Text  
 Transaction Name  
 Close Date  
 MLS Number  
 Listing Date  
 Expiration Date  
 Acceptance Date  
 List Price  
 Sale Price  
 Buyer Name(s)  
 Seller 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.

Doc Name  
Listing Agreement

Cancel Save Form

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Signing Date  
Full Name  
Company  
Text  
Checkbox  
Doc Text  
Transaction Name  
Close Date

## Signer Fields

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

Doc Name  
Listing Agreement

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Seller: \_\_\_\_\_ ("Seller") with a mailing address of \_\_\_\_\_

Signers  
seller

Fields  
Signature  
Initials  
Signing Date  
Full Name  
Company

## 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.

Doc Name  
Listing Agreement

Cancel Save Form

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AND

Signers  
seller

Fields  
Signature  
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## 7 Repeat for Additional Signers

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AND

Signers  
seller

Fields  
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Company  
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Doc Text  
Transaction Name

## 8 Confirm & Customize Request

- When the doc is finalized, click [Send] in the upper right corner.
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### 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.

**Signers**

Bitty Kabobs (seller)  
hollis+bob@paperlesspipeline.com

Gloria Witherspoon (buyer)  
hollis+gloria@paperlesspipeline.com

☒ Set signing order

### Subject

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

Subject

Sign Docs for: 9062 Birch Way - Counter Offer

## CC

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

CC (will receive signed doc)

hollis+agent@paperlesspipeline.com

*Enter email addresses*

## Message

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

Message (optional)

Hi,  
Please review and sign the attached Counter Offer.

Cancel

Send Now

### 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.

## Manage Signature Requests

Learn how to [Manage Signature Requests](#)