Manage Signature Requests

Manage every signature request you've sent from one central place. Track progress, send reminders, cancel requests, and more.

Introduction

Stay in control of every signature request you've sent without needing to track emails, chase signers, or guess what's still pending.

From one organized view, keep track of every request sent, including who has signed and who has not.

Need to take action? Instantly send reminders, cancel requests, and download PDF copies for your records.

View Signature Requests

Stay on top of every signature request sent. Instantly see what's pending, what's completed, and what's still in progress.

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

To view signature requests you've sent:

1 **Access Your Signature Requests**
   • Click your name in the upper right, then select [My Info].
   • From the left menu, select [Manage Signature Requests] under *Pipeline eSign*.

2 **View Sent Requests**
   • See a list of signature requests you've sent. Each request shows the date it was sent, its current status, and where it was sent from.

Track Signer Status

Know exactly who has signed, who's up next, and who may need a reminder.

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

To view the status of signature requests:

1 Access Your Signature Requests

● Click your name in the upper right, then select [My Info].

● From the left menu, select [Manage Signature Requests] under *Pipeline eSign*.

2 View Request Status

● Find the request you want to track.

● See the overall request status in the *Status* column.

● For requests with multiple signers, click [Show] in the *Signers* column to see each individual signer's status.

Send a Reminder

Send a quick reminder to signers who haven't completed their part.

Who Can Do This: Anyone whose company is subscribed to Pipeline eSign.
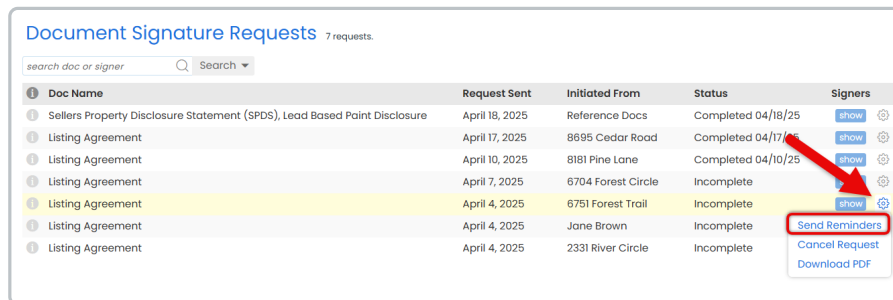
To send a signature request reminder:

① **Access Your Signature Requests**
- Click your name in the upper right, then select [My Info].
- From the left menu, select [Manage Signature Requests] under *Pipeline eSign*.

② **Send Reminders**
- Find the request you want to send a reminder for.
- Click the gear next to it, then select [Send Reminders].

③ **Confirm Reminders**
- Click [Send Reminders] to confirm. The system will send a reminder to any signers you're still waiting on.

Cancel a Signature Request

If a signature request is no longer needed, cancel it to stop the process.

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

To cancel a signature request:

① **Access Your Signature Requests**
- Click your name in the upper right, then select [My Info].
- From the left menu, select [Manage Signature Requests] under *Pipeline eSign*.

2 Cancel Request

- Find the request you want to cancel.
- Click the gear next to it, then select [Cancel Request].

3 Confirm Cancel

- Click [Cancel Signing Request] to stop the request. Your request will be canceled.

Download PDF

Download a PDF copy of a doc sent for signature to store, share, or review offline.

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

To download a PDF copy:

1 Access Signature Requests

- Click your name in the upper right, then select [My Info].
- From the left menu, select [Manage Signature Requests] under *Pipeline eSign*.

2 Download PDF

- Find the request containing the doc.
- Click the gear next to it, then select [Download PDF]. A PDF copy will download to your device.

Remove Signature Request from List

Remove any completed, canceled, or declined requests from your list.

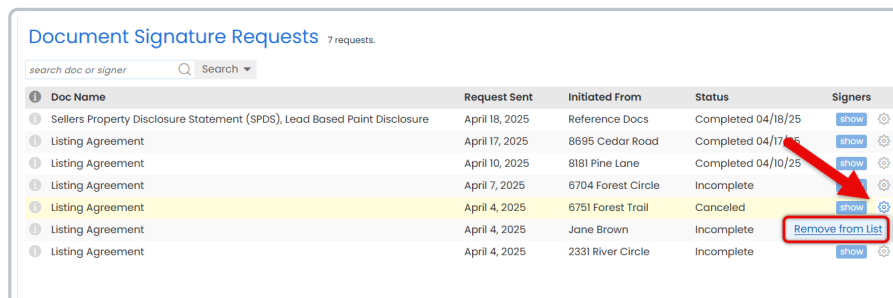**Who Can Do This:** Anyone whose company is subscribed to Pipeline eSign.

To remove a signature request:

1 Access Your Signature Requests

- Click your name in the upper right, then select [My Info].
- From the left menu, select [Manage Signature Requests] under *Pipeline eSign*.

2 Remove from List

- Find the request you want to remove from the list.
- Click the gear next to it, then select [Remove from List].

3 Confirm Removal

- Click [Remove] to confirm.