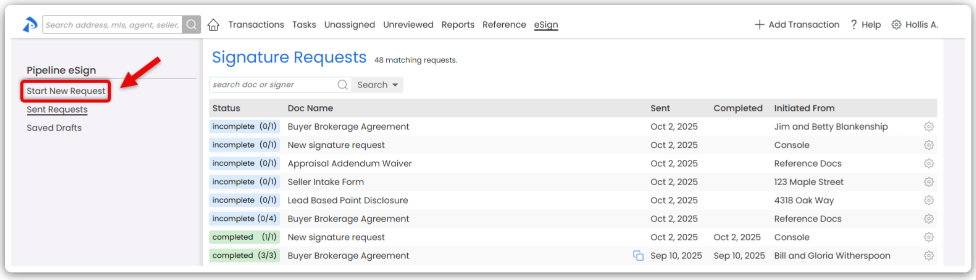
Sending eSign Requests

Send a standalone signature request from the eSign Page for documents you upload from your computer — outside any transaction or the Reference Library.

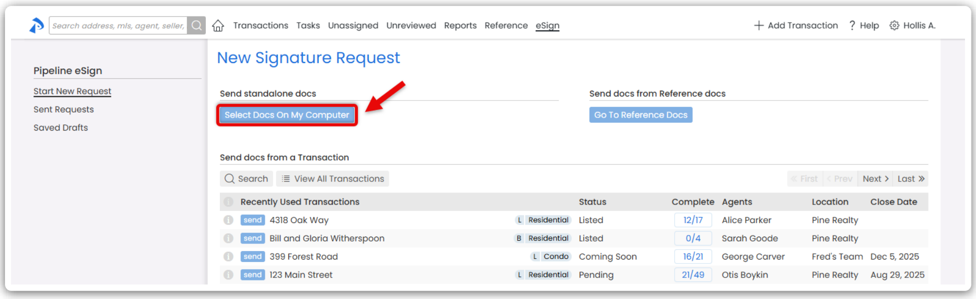
Who Can Do This: Anyone whose company is subscribed to Pipeline eSign.

To send a standalone signature request:

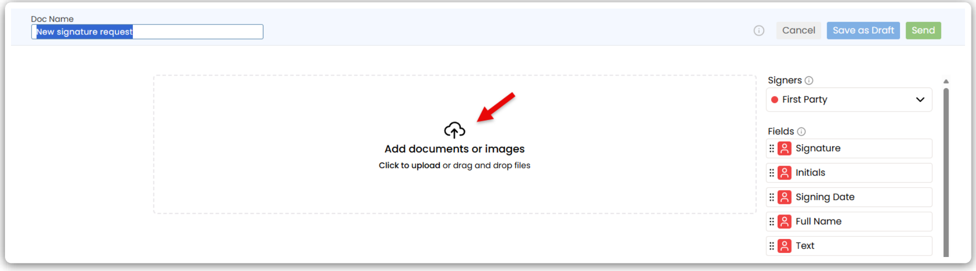
1. **Go to the eSign Page**
   - Click [eSign] from the top menu.
2. **Start the Signature Request**
   - Click [Start New Request] from the left menu.



   - Choose [Select Docs On My Computer].



3. **Upload Docs to be Signed**
   - Click to upload or drag and drop files you want to include in the request.



4 Place Fields for the First Party

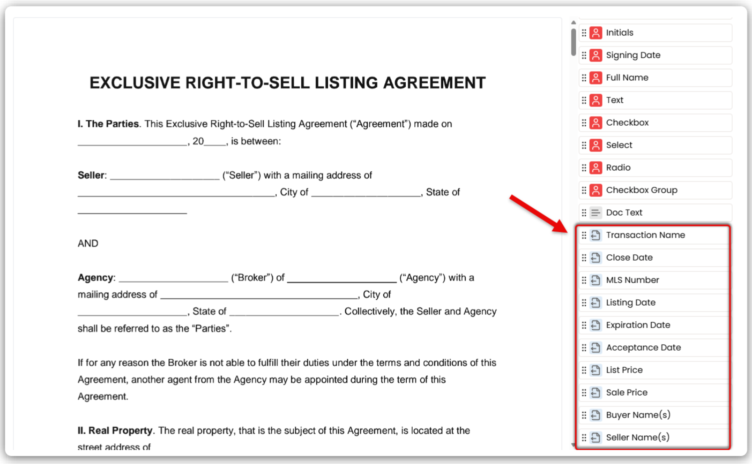
- Drag the necessary fields onto the doc from the*Fields* section on the right (outlined below).

> Need to pause? You can save your request as a draft at any time — just click [Save as Draft] in the upper right corner while editing. Learn more.

Transaction Info

Insert **Transaction Info** fields for deal-specific details like*Transaction Name*, *Listing Date*, and *Buyer Name(s)*.

> Want *Transaction Info* fields to autofill? Send the request from a transaction instead.



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**.

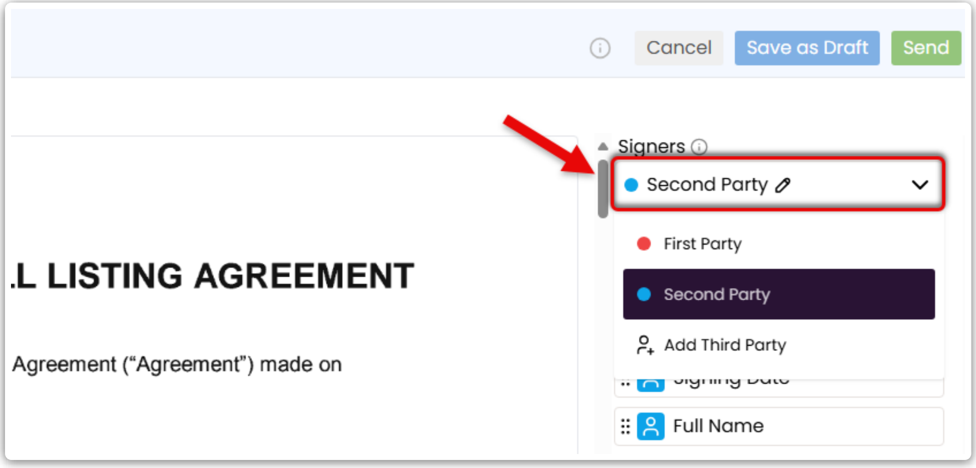
Flexible Fields

Insert flexible fields that can be completed by either the sender or signer, depending on who has the information.

- Add **Full Name** to automatically pull the signer's details directly from the transaction.
- Add a **Text** field when you need a flexible space that either the sender or signer can fill in with custom information.
- Add a **Checkbox** field whenever it will be needed on the form.
- Add a **Select**, **Radio**, or **Checkbox Group** to offer predefined choices.
  Copy and paste your first option for easy placement of subsequent options.

5 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.

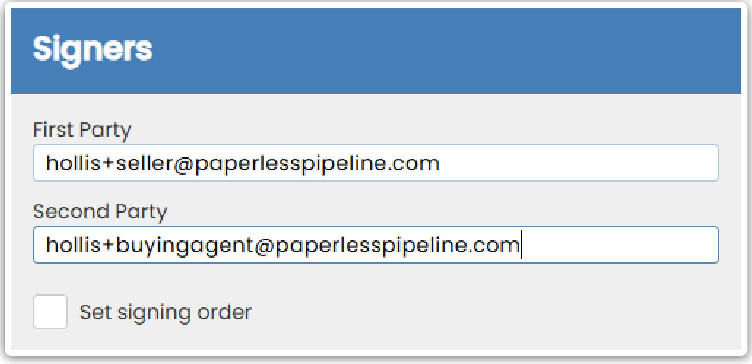


6 Confirm & Customize Request

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

Add Signers Email

Enter the email address for each signer as First Party, Second Party, and so on.

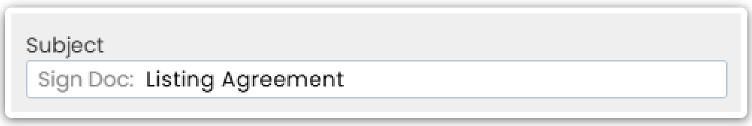


Signing Order

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 it 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.

7 **Send the Request**

- Click [Send Request]. Signers will receive an email with a secure link to review and sign from any device.
- When all signatures are complete, a final copy will be automatically returned to Pipeline in Your Sent Requests. 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.

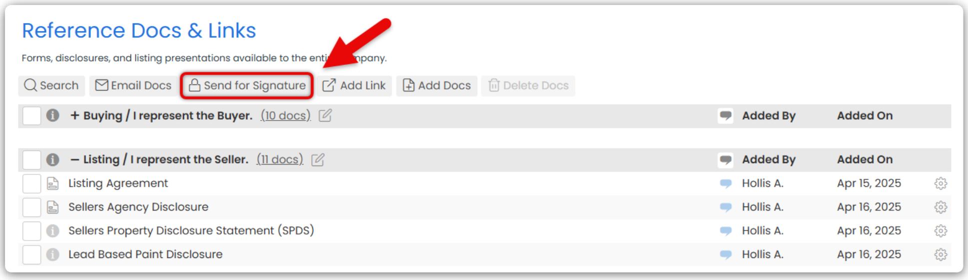
To send a signature request from the Reference Library:

1 Go to Your Reference Library

- Click [Reference] from the top menu.

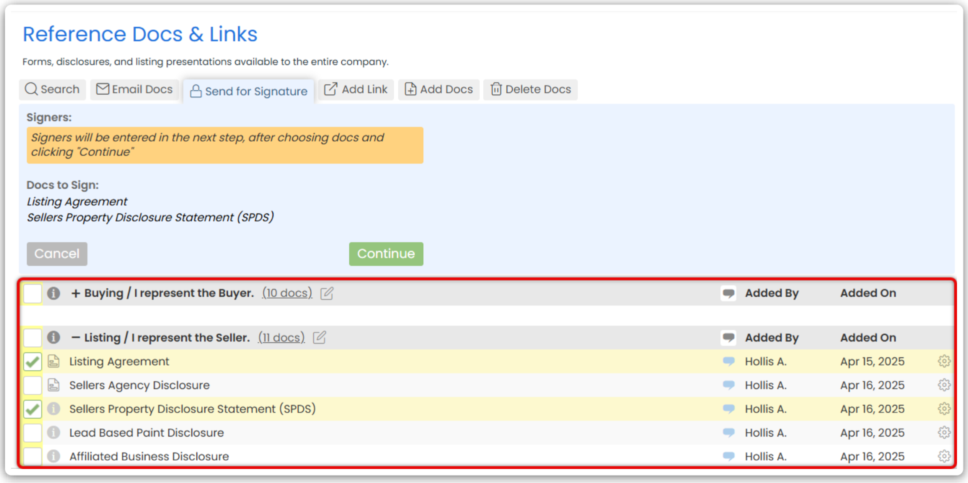
2 Start the Signature Request

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

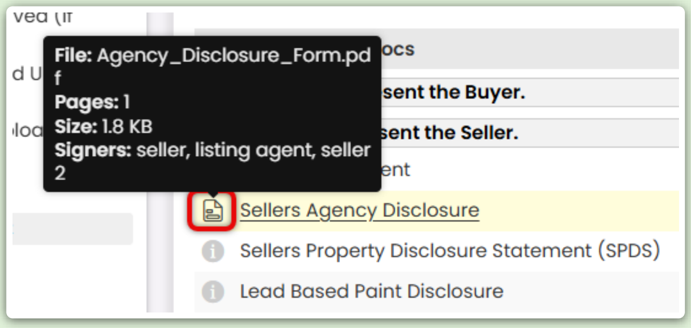


3 Select Docs to be Signed

- Check boxes next to the docs you want to include in the request.
- Click [Continue] to start preparing the request.



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.



4 Place Fields for the First Party

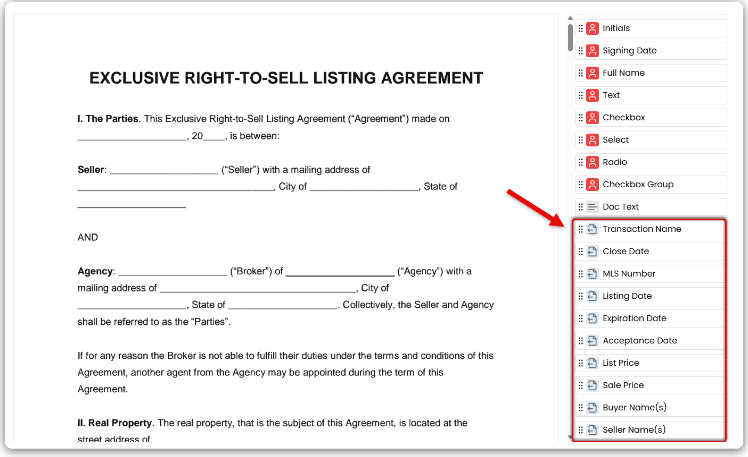
- If you're using a Form, confirm the prefilled details and place any additional fields needed.
- Drag the necessary fields onto the doc from the *Fields* section on the right (outlined below).

> Need to pause? You can save your request as a draft at any time — just click [Save as Draft] in the upper right corner while editing. Learn more.

Transaction Info

Insert **Transaction Info** fields for deal-specific details like *Transaction Name*, *Listing Date*, and *Buyer Name(s)*.

> Want *Transaction Info* fields to autofill? Send the request from a transaction instead.



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**.

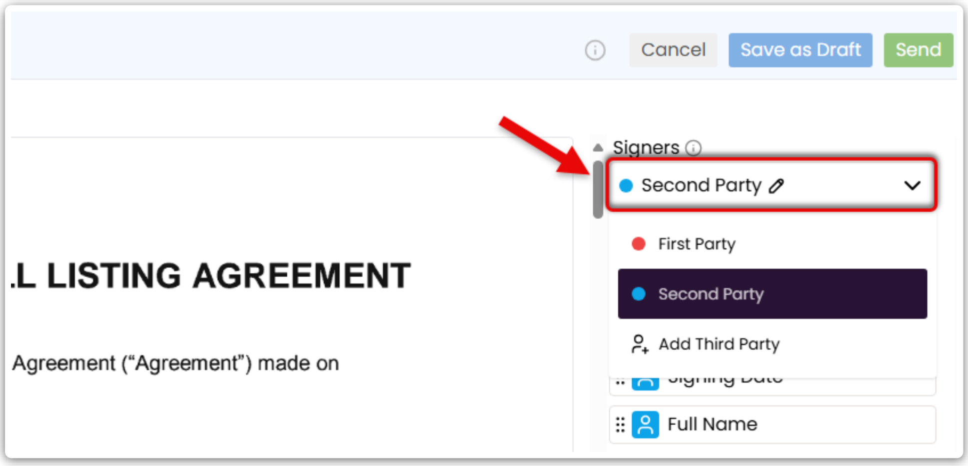
Flexible Fields

Insert flexible fields that can be completed by either the sender or signer, depending on who has the information.

- Add **Full Name** to automatically pull the signer's details directly from the transaction.
- Add a **Text** field when you need a flexible space that either the sender or signer can fill in with custom information.
- Add a **Checkbox** field whenever it will be needed on the form.
- Add a **Select**, **Radio**, or **Checkbox Group** to offer predefined choices. Copy and paste your first option for easy placement of subsequent options.

5 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.

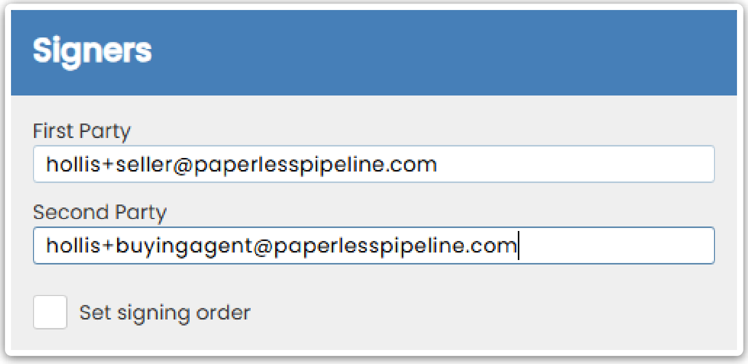


6 Confirm & Customize Request

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

Add Signers Email

Enter the email address for each signer as First Party, Second Party, and so on.



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 it 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.

7 **Send the Request**

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

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:

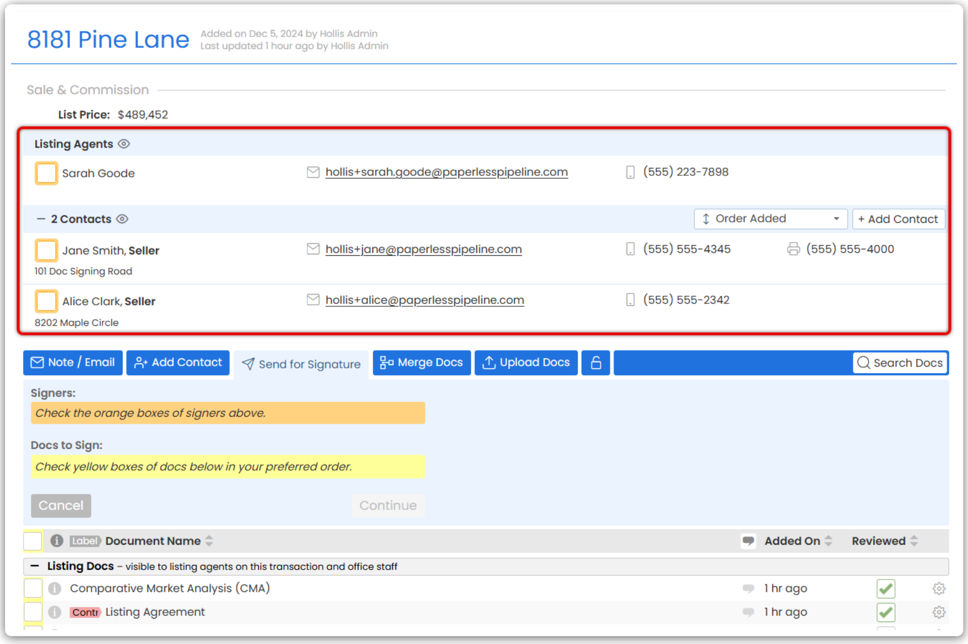
1 Start the Signature Request

Begin a signature request from the **eSign Page** or directly from a **transaction**.

- **From the eSign Page**: Go to the eSign Page by clicking [eSign] from the top menu. Select [Start New Request], then click [Send] next to the transaction you want to send a request from.
- **From the transaction**: Go to the transaction. Select [Send for Signature] from the blue action bar on the transaction.

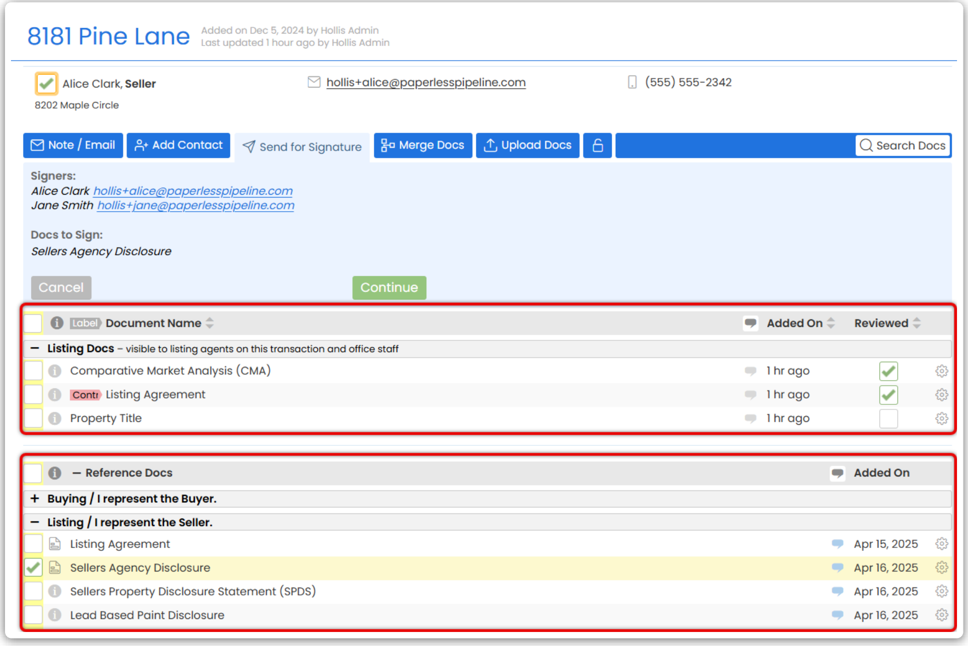
2 Select Signers

- Check boxes next to people who need to sign from the *Agents* or *Contacts* area.



3 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.



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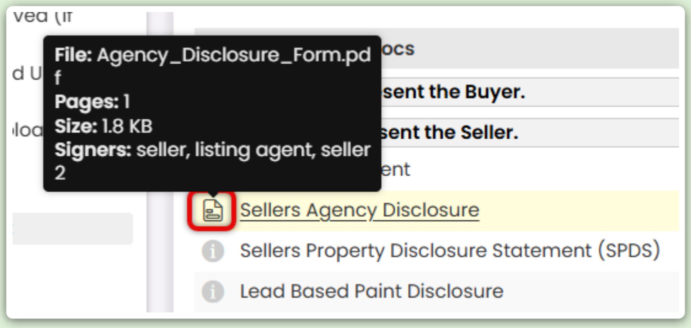
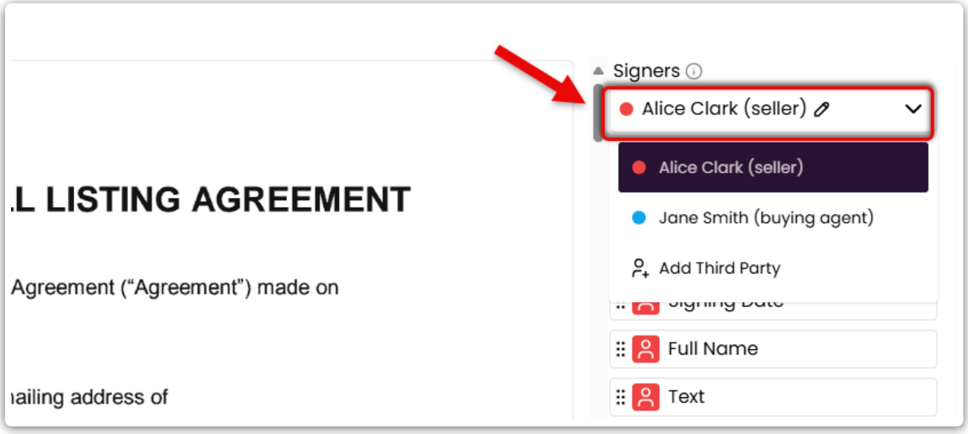


4 Select a Signer

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



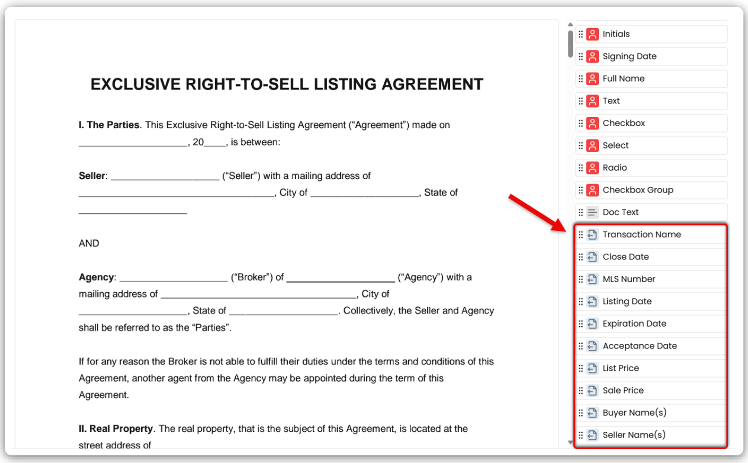
5 Place Fields for the Signer

- If you're 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).

> Need to pause? You can save your request as a draft at any time — just click [Save as Draft] in the upper right corner while editing. Learn more.

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

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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 the sender or signer, depending on who has the information.

- Add **Full Name** to automatically pull the signer's details directly from the transaction.
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6 Repeat for Additional Signers

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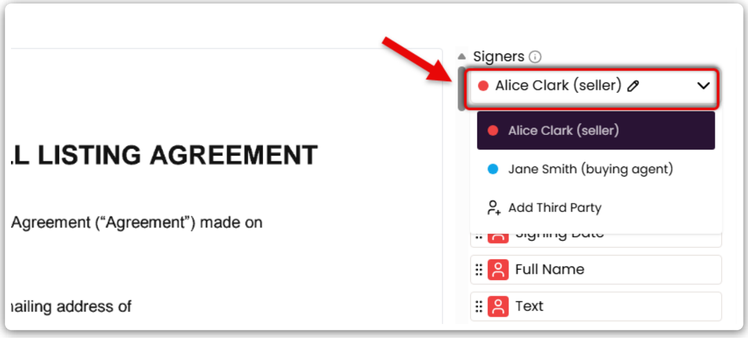
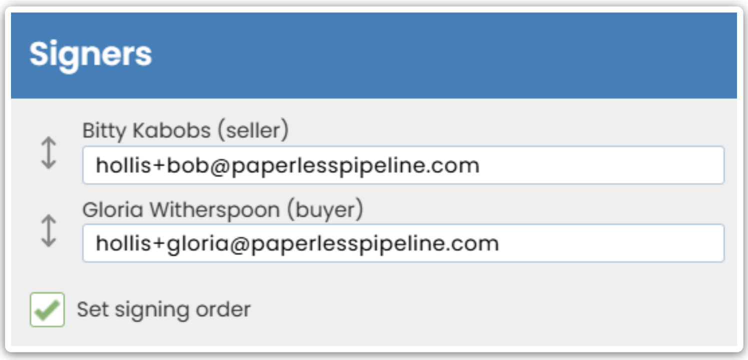


7 Confirm & Customize Request

- Once ready, 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

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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.

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.

Manage Sent Requests & Saved Drafts

Manage Your eSign Requests

Learn how to Manage Your eSign Requests

Manage Your eSign Drafts

Learn how to Manage Your eSign Drafts