

Sending eSign 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 using Pipeline eSign.

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 eSign 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.

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

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

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

<input type="checkbox"/> + Buying / I represent the Buyer. (10 docs)	Added By	Added On
<input type="checkbox"/> - Listing / I represent the Seller. (11 docs)	Added By	Added On
<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

☒ Sellers Agency Disclosure

☐ Sellers Property Disclosure Statement (SPDS)


☐ Lead Based Paint Disclosure

4 Place Fields for the First Party

- If you're using a Form, confirm the prefilled details and place any additional fields


needed.

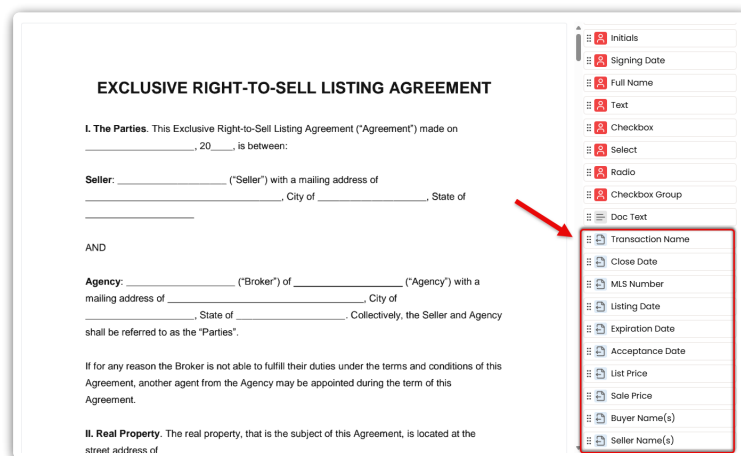
- Drag the necessary fields onto the doc from the *Fields* section on the right (outlined below).

 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.



The screenshot displays a document editor interface. The main document area shows a form titled "EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT". The form includes sections for "I. The Parties" and "II. Real Property", with various fields for names, addresses, and dates. On the right side, there is a sidebar titled "Fields" containing a list of available fields. A red arrow points from the "Transaction Name" field in the sidebar to the document text. The fields in the sidebar include: Initials, Signing Date, Full Name, Text, Checkbox, Select, Radio, Checkbox Group, Doc Text, Transaction Name, Close Date, MLS Number, Listing Date, Expiration Date, Acceptance Date, List Price, Sale Price, Buyer Name(s), and 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.

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

Fields:

- Initials
- Signing Date
- Full Name
- Text
- Checkbox
- Select
- Radio
- Checkbox Group
- Doc Text**
- Transaction Name
- Close Date

Signer Fields

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

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 _____

Signers: First Party

Fields:

- Signature**
- Initials
- Signing Date
- Full Name
- Text
- Checkbox

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.

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

Signers ▾
 ● First Party ▾

Fields ▾
 :: Signature
 :: Initials
 :: Signing Date
 :: Full Name
 :: Text
 :: Checkbox
 :: Select
 :: Radio
 :: Checkbox Group
 :: Doc Text
 :: Transaction Name

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.

L LISTING AGREEMENT

Agreement ("Agreement") made on _____

Signers ▾
 ● Second Party ▾

● First Party

● Second Party

⚙ Add Third Party

:: Signing Date

:: Full Name

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.

Signers

First Party

hollis+seller@paperlesspipeline.com

Second Party

hollis+buyingagent@paperlesspipeline.com

☐ Set signing order

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

↕

Second Party

hollis+buyingagent@paperlesspipeline.com

↕

First Party

hollis+seller@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)

Enter email addresses

Message

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

Message (optional)

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 Go to the Transaction

- Open the transaction where you need to take action.

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 (555) 223-7898

2 Contacts Order Added + Add Contact

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

☐ Alice Clark, **Seller** hollis+alice@paperlesspipeline.com (555) 555-2342
9202 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

Listing Docs - visible to listing agents on this transaction and office staff

Label	Document Name	Added On	Reviewed
<input type="checkbox"/>	Comparative Market Analysis (CMA)	1 hr ago	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Conte 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** ☐ hollis+alice@paperlesspipeline.com (555) 555-2342
8202 Maple Circle

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

Signers:
Alice Clark hollis+alice@paperlesspipeline.com
Jane Smith hollis+jane@paperlesspipeline.com

Docs to Sign:
Sellers Agency Disclosure


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


Label	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"/>
	Cont Listing Agreement	1 hr ago	<input checked="" type="checkbox"/>
	Property Title	1 hr ago	<input type="checkbox"/>
Reference Docs			
+ Buying / I represent the Buyer.			
- Listing / I represent the Seller.			
	Listing Agreement	Apr 15, 2025	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Sellers Agency Disclosure	Apr 16, 2025	<input checked="" type="checkbox"/>
	Sellers Property Disclosure Statement (SPDS)	Apr 16, 2025	<input type="checkbox"/>
	Lead Based Paint Disclosure	Apr 16, 2025	<input type="checkbox"/>




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

 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.

EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT

Agreement ("Agreement") made on _____

Mailing address of _____

Signers

- Alice Clark (seller) [edit icon]
- Alice Clark (seller)
- Jane Smith (buying agent)

+ Add Third Party

Signing Date

Full Name

Text

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).

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)*.

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 Agreement, another agent from the Agency may be appointed during the term of this Agreement.

II. Real Property. The real property, that is the subject of this Agreement, is located at the street address of _____

Fields

- Initials
- Signing Date
- Full Name
- Text
- Checkbox
- Select
- Radio
- Checkbox Group
- Doc Text
- Transaction Name
- Close Date
- MLS Number
- Listing Date
- Expiration Date
- Acceptance Date
- List Price
- Sole 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.

The screenshot shows a form titled "EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT". The form content includes a section "I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on _____, 20____, is between:" followed by a "Seller:" line with a placeholder for a mailing address. The sidebar on the right lists various field types: Initials, Signing Date, Full Name, Text, Checkbox, Select, Radio, Checkbox Group, Doc Text (highlighted with a red box and a red arrow), Transaction Name, and Close Date.

Signer Fields

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

This screenshot shows the same form as before, but with the "Signers" dropdown menu open. It displays "Alice Clark (seller)" as the selected signer. Below the dropdown, a list of fields is shown for this signer: Signature, Initials, Signing Date, Full Name, and Text. A red arrow points to the "Signature" field in this list.

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.

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

- Initials
- Signing Date
- Full Name
- Text
- Checkbox
- Select
- Radio
- Checkbox Group
- Doc Text
- Transaction Name
- Close Date

7 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.

EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT

Agreement ("Agreement") made on _____

mailing address of _____

Signers

- Alice Clark (seller)
- Jane Smith (buying agent)
- Add Third Party

8 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.

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.

A screenshot of a form field labeled "Subject". The text "Sign Docs for: 9062 Birch Way - Counter Offer" is entered into the field.

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).

A screenshot of a form field labeled "CC (will receive signed doc)". The email address "hollis+agent@paperlesspipeline.com" is entered. Below the input field is a placeholder text "Enter email addresses".

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.

A screenshot of a form field labeled "Message (optional)". The text "Hi, Please review and sign the attached Counter Offer." is entered. At the bottom of the form are two buttons: "Cancel" and "Send Now".

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 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

Manage Your eSign Requests

Learn how to [Manage Your eSign Requests](#)

Manage Company-Wide eSign Requests

Learn how to [Manage Company-Wide eSign Requests](#)