

Saving eSign Drafts

Save an eSign draft to pause a request and finish it later, or allow an admin to review. Everything stays exactly as you left it so you can pick up where you left off.

Introduction

Pipeline eSign signature requests can be sent from transactions or from Reference Docs, blending seamlessly into your process.

But, sometimes, those requests are not always ready to send. You may be waiting on details, an internal review, or just need to pause mid-process.

Save your work as a draft instead of starting over later. Your documents, signers, and fields stay exactly as you left them.

How It Works

Pause Anytime

Start a signature request and add your documents, recipients, and fields. If you're not ready to send, just save your progress as a draft.

Pick Up Where You Left Off

Your saved draft stays just as you left it. You can return to it anytime, or an admin may review or finish it.

Send When You're Ready

Agents or their admins may return to the draft at any time to review, edit, or send.

Save a Draft from Reference

Save a draft while preparing a signature request from the Reference Library, so you can finish and send it later.

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

To save a signature request draft from Reference:

1 Start a Signature Request

- Begin [sending an eSign request](#) from the Reference Library — add your documents, signers, and any needed fields.

2 Save as Draft

- Click [Save as Draft] to pause your progress and return to it later.

The screenshot shows the Pipeline eSign interface. At the top, there's a header with 'Doc Name: Listing Agreement' and a 'First Party' indicator. The main area displays a document titled 'EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT'. The document content includes a section 'I. The Parties' with fields for 'Seller' and 'Agency'. On the right side, there's a sidebar with a list of fields: Transaction Name, Doc Text 2, Doc Text 3, Signature, Initials, Signing Date, Full Name, Text, Checkbox, Select, Radio, Checkbox Group, and Doc Text. At the top right of the document area, there are three buttons: 'Cancel', 'Save as Draft' (highlighted with a red box and a red arrow), and 'Send'.

Save a Draft from Transactions

Save a draft while preparing a signature request from a transaction, so you can finish and send it later.

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

To save a signature request draft from a transaction:

1 Start a Signature Request

- Begin [sending an eSign request](#) from a transaction — add your documents, signers, and

any needed fields.

2 Save as Draft

- Click [Save as Draft] to pause your progress and return to it later.

Doc Name
Listing Agreement

Transaction
9771 Lakeshore St

Cancel Save as Draft Send

• buyer

EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT

I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on 9771 Lakeshore St, 2025, is between:

Seller: Adrienne Stokes ("Seller") with a mailing address of Doc Text 3 x St, City of City, State of State

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".

Listing Agreement (3 pages)

Signers
• Jon Tompkins (buyer)

Fields
Transaction Name
Doc Text 1
Seller Name(s)
Doc Text 2
Doc Text 3
Signature
Initials
Signing Date
Full Name
Text
Checkbox

Manage Saved Drafts

Manage Your Drafts

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

Manage Company-Wide Drafts

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