Getting Started with Pipeline eSign

Unlock the power of Pipeline eSign. Start a free trial, activate your plan, and get your team ready to send secure signature requests inside Paperless Pipeline.

Introduction

Getting started with Pipeline eSign is quick. There's nothing new to log into, no extra tools, and no need to change how your team works.

Once activated, your team can start sending requests instantly. Everything stays within Pipeline from start to finish.

Video ⬚

Request a Free Trial

Give Pipeline eSign a try with two free signature requests.

Who Can Do This: Master Admins.

To request a free Pipeline eSign trial:

Begin The Process — contact us using one of the following methods:

- Log into your Master Admin profile and message us within Pipeline.

- Or, send us an email from the email address tied to your Master Admin profile.

Await Review

Once we receive your request, we'll follow up with the next steps.

Activate Pipeline eSign

Activate Pipeline eSign by setting a flexible monthly budget that works for your team. You choose your monthly usage limit, and you're only billed for what you actually use.

Who Can Do This? Master Admins.

To activate Pipeline eSign:

Go to eSign Settings

- Click your name in the upper right, then select [Admin / Settings].

- From the left menu, select [Pipeline eSign] under *Add-On Modules*.

Choose Your Limit

- Drag the slider to set your max monthly budget based on the number of signature requests you want to allow.

- If you need more than 2,000 signature requests, enter the amount manually.

Activate Pipeline eSign

- Click [Activate Pipeline eSign →].

- Review billing details, then click [Add Document Signing] to activate your Pipeline eSign plan.

Learn more about how your Pipeline eSign plan works.

Set Up Pipeline eSign

No setup is required to start using Pipeline eSign. Once it's activated, your team can begin sending signature requests right away.

A few optional steps can make the process even smoother:

- **Tune Up Your Doc Settings**: Make sure your Doc Labels and Doc Names are optimized for signed docs.

- **Get Your Reference Library Ready**: Add frequently used docs to your Reference Library so your team

can access them quickly.

- **Create Reference Forms**: Turn frequently used docs into smart forms that autofill with transaction and signer details.

Use Pipeline eSign

Pipeline eSign is your team's secure e-signature solution, built directly into Paperless Pipeline. You can prepare documents, send them for signature, track their status, and collect signed copies, all without leaving the system.

Learn how to Use Pipeline eSign.