# 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.

### Request a Free Trial

Request a free trial to test Pipeline eSign in action.

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 monthly limit that fits your team's size and pace. It's not a flat fee, just a cap, and you only pay for the signature requests your team actually sends.

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 Drag the slider below to set your monthly spending limit.			
ł	\$0.50 per request 1	up to	\$60.00 monthly limit
	Allows 120	20 signature requests a month n your March 2025 volume, we estimate uld have made 20 signature requests. vate Pipeline eSign →	

#### **Activate Pipeline eSign**

- Click [Activate Pipeline eSign  $\rightarrow$ ].
- 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

Send, track, and manage signature requests with ease. Pipeline eSign supports every stage of your signing workflow with flexible plans, reusable templates, and built-in tools.

### Learn how to Use Pipeline eSign.