Send Signature Requests

With Pipeline eSign, send fast, secure, reliable signature requests. Docs flow seamelessly from Paperless Pipeline to your signers, then return completed and ready to move forward.

Introduction

Send secure, professional signature requests without leaving Paperless Pipeline or interrupting your workflow.

Start from a transaction to autofill 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 deal.

As you prepare your request, you can add signer roles, drag and drop fields exactly where they're needed, and insert transaction information automatically to save time and reduce errors. You can also customize the signing experience by setting a signing order, adding CCs, and including a personal message.

Each request goes out with a secure link that can be signed from any device. Once completed, the signed document is automatically returned to Unassigned Docs, ready to be assigned like any other doc.

Send a Signature Request from Transactions

Send a signature request directly from a transaction to choose signers effortlessly, autofill transaction details, 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:

Go to the Transaction

• Open the transaction where signatures are needed.

Start the Signature Request

• Click [Send for Signature] from the action bar on the transaction.

Select Signers

 Check the boxes next to people who need to sign. Choose from Agents, Assistants, Outside (Co-op) Agents, or Contacts.

ale & Commission				
List Price: \$489,452				
Listing Agents ③				
Sarah Goode	hollis+sarah.goode@paperlesspipeline.com	. (555) 223-7898		
- 2 Contacts ③		1 Order A	Added +	+ Add Contact
Jane Smith, Seller 101 Doc Signing Road	hollis+jane@paperlesspipeline.com	. (555) 555-4345	🔒 (555)	555-4000
Alice Clark, Seller 8202 Maple Circle	hollis+alice@paperlesspipeline.com	. (555) 555-2342		
		2		Q Search Docs
Mote / Ernali Add Contact	Send for Signature Ad Merge Docs upload Docs			
Signers:	Send for signature	2		
Signers: Check the orange boxes of signers about	ve.			
Signers: Check the orange boxes of signers about Docs to Sign:	re.	J		
Signers: Check the orange boxes of signers abo Docs to Sign: Check yellow boxes of docs below in yo	ve ur preferred order.			
Cancel	ve. ur preferred order.			
Creact He orange bases of signers abor Check the orange bases of signers abor Docs to Sign: Check yellow bases of docs below in yo Cancel	ve. ur preferred order. Continue	•	Added On ≑	Reviewed 🔶
Check the orange boxes of signers abor Check the orange boxes of signers abor Does to Sign: Check yellow boxes of docs below in yo Cancel Cancel Listing Docs – visible to listing ogens on t	ve. ur preferred order. Continue	•	Added On 🗘	Reviewed 🗘
Cencer Hear Per Nob Contact Signers: Check the arange baxes of signers abor Does to Sign: Check yellow baxes of docs below in yoo Cancel District Document Name Litting Docs - visible to listing agents on Comparative Market Analysis (CM	ve ur preferred order. Continue his transaction and office staff (A)	•	Added On 💠	Reviewed 🗘

?

Only select people who will be signing. If you're just preparing the doc, you don't need to include yourself.

Select Docs to be Signed

- Check the boxes next to the docs you want to include in the request. Choose from Transaction Docs and Reference Docs.
- Click [Continue] to start preparing the request.

81	81 Pine Lane Added on Dec t Last updated 11	5, 2024 by Hollis Admir hour ago by Hollis Adr	n nin								
820	Alice Clark, Seller 12 Maple Circle	∑ <u>hollis+ali</u>	ce@paperlesspip	eline.com		. (555) 555-2342					
	Note / Email 🛛 음+ Add Contact 🛛 🦪 Se	end for Signature	문 Merge Docs	1 Upload Docs	6					Q Search D	ocs
Sig Alia Jar	ners: ce Clark <u>hollis+alice@paperlesspipeline.c</u> ne Smith <u>hollis+jane@paperlesspipeline.c</u>	<u>com</u>									
Doo Seli	es to Sign: lers Agency Disclosure										
С	ancel	Co	ontinue								
Г	🚺 🚺 Label) Document Name 🗘						•	Added On	e V	Reviewed \diamondsuit	٦
- 1	Listing Docs - visible to listing agents on this t	transaction and office	staff								
	Comparative Market Analysis (CMA)						•	1 hr ago		~	
	Contr Listing Agreement						9	1 hr ago		 Image: A set of the set of the	 (3)
	Property Title						•	1 hr ago			⇔
_							_		_		_
	1 – Reference Docs								•	Added On	
+	Buying / I represent the Buyer.										
- 1	Listing / I represent the Seller.										
	🖹 Listing Agreement								•	Apr 15, 2025	 (3)
~	Sellers Agency Disclosure								•	Apr 16, 2025	<0}
	Sellers Property Disclosure Statement	it (SPDS)							•	Apr 16, 2025	63
	Lead Based Paint Disclosure								•	Apr 16, 2025	٨

Select a Signer

• Use the Signers dropdown to choose the first person who will sign.

Sellers Agency Disclosure	DIGI Pina Lone	Concel Send
oonors agency bisclosure		
HOURSENSE 	AGENCY DISCLOSURE FORM	2 Signers Jone Smith (seller) Jone Smith (seller) Alice Clork (seller 2)
Anton Mana Marian Far Leanna Far Leanna Far Leanna Far Leanna Far Leanna Far	Property Address: City: ZIP:	P. Add Third Party
Sellers Agency Disclosure () pages)	2. PURPOSE OF THIS FORM	: 😫 Company
	This form is intended to disclose the agency relationships available in a real estate transaction,	II 🔗 Text
	and to document the specific agency relationship established between the parties.	# 😫 Checkbox
	3. TYPES OF AGENCY RELATIONSHIPS	E Doc Text
	[] Seller's Agent - The real estate agent represents only the Seller.	Close Date
	[] Buyer's Agent - The real estate agent represents only the Buyer.	II 🔄 MLS Number

Start with the first signer. This keeps the request organized and fields tied to the right roles.

Place Fields for the Signer

• Drag and drop the necessary fields from the right menu onto the doc (outlined below).

Autofilled Transaction Info

Insert the available 🔁 **Transaction Info** fields to automatically pull key details directly from the transaction, like *Transaction Name*, *Listing Date*, and *Buyer Name*(s).

greement		(i) Cancel Sav
		Signing Date
		H 😫 Full Name
EXCLUSIVE RIGHT	-TO-SELL LISTING AGREEMENT	🗄 🔗 Company
		H 😫 Text
I. The Parties. This Exclusive Right-	to-Sell Listing Agreement ("Agreement") made on	II 😤 Checkbox
, 20, is	s between:	II II Doc Text
Coller /*C	aller") with a mailing address of	🗄 📑 Transaction Name
	. City of . State of	🗄 🔁 Close Date
		🗄 🔁 MLS Number
		🗄 🔁 Listing Date
AND		🗄 🔁 Expiration Date
Agency: ("Broker") of ("Agency") with a	🗄 🔁 Acceptance Date
mailing address of	, City of	🗄 🔁 List Price
, State of	Collectively, the Seller and Agency	🗄 🛅 Sale Price
shall be referred to as the "Parties".		ii 🔁 Buyer 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.

Name	
ting Agreement	Cancer Save Fo
	A
	📗 🗄 🙁 Signing Date
	🗄 😫 Full Name
EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT	II 🤗 Company
	🗄 😫 Text
I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on	II 😫 Checkbox
, 20, is between:	🗄 🚍 Doc Text
	🗄 🔁 Transaction Name
Seller: ("Seller") with a mailing address of . Citv of . State of	🗄 🔁 Close Date

Signer Fields

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

loc Name			
listing Agreement		(i) Cancel	
		Signers ①	
		• seller	~
		Fields 0	
EXCLUSIV	E RIGHT-TO-SELL LISTING AGREEMENT	II 🔗 Signature	
		🗄 🔗 Initials	
I. The Parties. This E	Exclusive Right-to-Sell Listing Agreement ("Agreement") made on	🗄 🤗 Signing Date	
	, 20, is between:	🗄 🔗 Full Name	
		T 🖸 Company	

Flexible Fields

Insert flexible fields that can be completed by either you or signer(s), depending on who has the information.

- Add **Full Name** and **Company** fields to automatically pull signer details directly from the transaction.
- Add a **Text** field when you need a flexible space for the signer to fill in custom information.
- Add a **Checkbox** field when you need something acknowledged, required, or reviewed by the signer.

isting Agreement	(i) Cancel Save For
	 Signers ① seller
	Fields ()
EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT	ii 🔗 Initials
I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on , 20, is between:	II R Signing Date
Seller: ("Seller") with a mailing address of	ii 🔀 Company
, City of, State of	ii 🤗 Text
	II CHECKDOX
AND	# Ch Transaction Name



Need help choosing the right fields? Check the Signature Fields Reference Guide for details on each field type.

Repeat for Additional Signers

- Use the Signers dropdown to select additional signers, one at a time.
- Place and fill fields required for each signer to keep the form organized and easy to use.

oc Name isting Agreement	(i) Cancel Save For
	Signers O seller
EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT	Fields ① :: 🔗 Signature
I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on	Imitials
Seller: ("Seller") with a mailing address of	III A Full Name
, City of, State of	Image: Part Provide the second sec
AND	III == Doc Text

Finalize Request

- When the doc is finalized, click [Send] in the upper right corner of the doc preview.
- Optionally, customize the signing flow, include non-signers, or add a personal message:
 - Set 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.
 - **Update Subject**: Customize the email subject to reflect the docs to be signed, or leave it as is.
 - Add CCs: If someone who isn't signing needs to receive a copy of the signed (docs), enter their email address.
 - Add a Message: Add a short note or instructions to appear in the body of the email your recipients receive.

Transaction 9062 Birch Way		
COUNTER OI	Signers	 2 Signers () Bitty Kab
1. PROPERTY	Bitty Kabobs (seller) ↑ hollis+bob@paperlesspipeline.com Gloria Witherspoon (buyer) ↑ hollis-gloria@paperlesspipeline.com	Fields () Signatu
2. ORIGINAL OFFER DATE Date of Original Offer: 03/27/2	Subject	። 🤗 Signa ። 🔗 Initial
3. TERMS BEING COUNTER	Sign Docs for: 9062 Birch Way - Counter Offer CC (will receive signed doc) hollis+agent@paperlesspipeline.com Enter email addresses	
Buyer to pay closing costs.	Message (optional) Hi, Please review and sign the attached Counter Offer.	II Check
4. ACCEPTANCE DEADLINE	Cancel Send Now	II 🕘 Trans II 🕘 Close
This counter offer shall expire 5. SIGNATURES	unless accepted by: 04/26/2025	II 🕘 MLS N II 🕘 Listing II 🕘 Expire

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 automatically added to Unassigned Docs, ready to assign like any other doc.

Send a Signature Request from Reference

Send a signature request from the Reference Library when you need a quick, flexible option 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:

Go to Your Reference Library

• Click [Reference] from the top menu.

Start the Signature Request

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

eference Docs & Links		
rms, disclosures, and listing presentations available to the entire pany.		
) Search 🗹 Email Docs 🕒 Send for Signature 🖸 Add Link 🕒 Add Docs 🗊 Delete Docs		
+ Buying / I represent the Buyer. (10 docs)	Added By	Added On
Listing / I represent the Seller. (11 docs) [7]	Added By	Added On
Listing Agreement	 Hollis A. 	Apr 15, 2025
Sellers Agency Disclosure	 Hollis A. 	Apr 16, 2025
Sellers Property Disclosure Statement (SPDS)	 Hollis A. 	Apr 16, 2025
Lead Based Paint Disclosure	Hollis A	Apr 16, 2025

Select Docs to be Signed

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

Refere	INCE DOCS	& Links sentations available to the e	ntire company.						
Q Search	🗹 Email Docs	🛆 Send for Signature	🖸 Add Link	Add Docs	Delete Docs				
Signers:									
Signers wi clicking "C	ill be entered in the Continue"	e next step, after choosi	ng docs and						
Docs to Sig Listing Agre Sellers Prop Cancel	ın: eement oerty Disclosure St	tatement (SPDS)	Contin	ue					
0 + 1	Buying / I represe	nt the Buyer. (<u>10 docs)</u>	C			9	Added By	Added On	
0 -	Listing / I represer	nt the Seller. (<u>11 docs)</u> [2			-	Added By	Added On	
🖌 📄 List	ing Agreement					-	Hollis A.	Apr 15, 2025	ŵ
📄 🖻 Sel	lers Agency Disclo	sure				-	Hollis A.	Apr 16, 2025	٢
🖌 🚺 Sel	lers Property Discl	osure Statement (SPDS)				-	Hollis A.	Apr 16, 2025	٢
🚺 🚺 Lea	d Based Paint Dis	closure				-	Hollis A.	Apr 16, 2025	٢
Affi	ligted Business Dis	sclosure				-	Hollis A.	Apr 16, 2025	@

Select a Signer

• Use the Signers dropdown to choose the first person who will sign.

Doc Name	Transaction	
Sellers Agency Disclosure	8181 Pine Lane	(i) Cancel Send
LUCIOLOGY Martine Martin	AGENCY DISCLOSURE FORM 1. PROPERTY INFORMATION Proverty Address:	• 2 Signers ⊙ • Jane Smith (seller) & • Jane Smith (seller) • Jane Smith (seller) • Alice Clark (seller 2) \$ \$ \$ Add Third Party
hr br	City: State: ZIP:	II 😫 Full Name
poges)	2. PURPOSE OF THIS FORM	🗄 🤮 Company
	This form is intended to disclose the agency relationships available in a real estate transaction,	🗄 🙎 Text
	and to document the specific agency relationship established between the parties. 3. TYPES OF AGENCY RELATIONSHIPS 1. Solida have The established according to the particulation of the particulation	# 🤱 Checkbox
		# 🚍 Doc Text
		🗄 🛅 Transaction Name
	[] Seller's Agent - The real estate agent represents only the Seller.	🗄 🔁 Close Date
	[] Buver's Agent - The real estate agent represents only the Buver.	II D MIS Number

Start with the first signer. This keeps the request organized and fields tied to the right roles.

Place Fields for the Signer

• Drag and drop the necessary fields from the right menu onto the doc (outlined below).

Autofilled Transaction Info

Insert the available 🗄 **Transaction Info** fields to automatically pull key details directly from the transaction, like *Transaction Name*, *Listing Date*, and *Buyer Name*(s).

bc Name isting Agreement	Cancel Save Form
	I 🖁 Signing Date
	🗄 😫 Full Name
EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT	🗄 🔗 Company
	II 😫 Text
I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on	II 🔗 Checkbox
, 20, is between:	H 🖃 Doc Text
Seller ("Seller") with a mailing address of	🗄 🔁 Transaction Name
, City of, State of	🗄 🔁 Close Date
	🗄 🔁 MLS Number
	🗄 🔁 Listing Date
AND	🗄 🔁 Expiration Date
Agency: ("Broker") of ("Agency") with a	🗄 🔁 Acceptance Date
mailing address of, City of	🗄 🔁 List Price
, State of Collectively, the Seller and Agency	II 🔁 Sale Price
shall be referred to as the "Parties".	🗄 🔁 Buyer Name(s)
If for any reason the Broker is not able to fulfill their duties under the terms and conditions of this	🗄 🔁 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.

	O Ornert Cruster
Listing Agreement	Cancer Save Po
	📗 🗄 🔗 Signing Date
	🗄 🤗 Full Name
EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT	II 🔗 Company
	ii 😫 Text
I. The Parties. This Exclusive Right-to-Seil Listing Agreement ('Agreement') made on, 20, is between:	🔛 🗄 😤 Checkbox
	🗄 🚍 Doc Text
Colley: ("Colley") with a mailing address of	🗄 🔁 Transaction Name
Seller: (Seller) with a mailing address of	:: 📮 Close Date

Signer Fields

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

Doc Name		
Listing Agreement		(i) Cancel Save Form
		* Signers ①
	•	• seller V
		Fields 💿
EXCLUSIV	E RIGHT-TO-SELL LISTING AGREEMENT	# 😫 Signature
		# 🔗 Initials
I. The Parties. This E	xclusive Right-to-Sell Listing Agreement ("Agreement") made on	II 😫 Signing Date
	, 20, is between:	H 🔒 Full Name
Seller:	("Seller") with a mailing address of	II 😫 Company

Flexible Fields

Insert flexible fields that can be completed by either you or signer(s), depending on who has the information.

- Add **Full Name** and **Company** fields to automatically pull signer details directly from the transaction.
- Add a **Text** field when you need a flexible space for the signer to fill in custom information.
- Add a **Checkbox** field when you need something acknowledged, required, or

Listing Agreement		(i) Cancel Save Form
		Signers 🛈
		• seller V
		Fields ()
EXCLU	SIVE RIGHT-TO-SELL LISTING AGREEMENT	II 🤗 Signature
	# 🔗 Initials	
I. The Parties.	I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on	II 😫 Signing Date
	, 20, is between:	🗄 🔗 Full Name
Seller:	("Seller") with a mailing address of	# 😫 Company
	, City of, State of	# 🔗 Text
		II 🔒 Checkbox
		E E Doc Text
AND		II D Transaction Name



Need help choosing the right fields? Check the Signature Fields Reference Guide for details on each field type.

Repeat for Additional Signers

- Use the Signers dropdown to select additional signers, one at a time.
- For each signer, place and fill fields required.

Doc Name Listing Agreement	Cancel Save Form
	 Signers ① ● seller
EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT	Fields ① III 🔗 Signature
I. The Parties. This Exclusive Right-to-Sell Listing Agreement ("Agreement") made on	# A Initials # A Signing Date
, 20, is between: Seller: ("Seller") with a mailing address of	# 🤗 Full Name # 🤗 Company
, City of, State of	# 🤗 Text # 🤗 Checkbox
AND	ii ≡ Doc Text ii 🔁 Transaction Name

Complete Request

- Click [Send] in the upper right corner of the doc preview.
- Optionally, customize the signing flow, include non-signers, or add a personal message:
 - **Set 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.
 - **Update Subject**: Customize the email subject to reflect the docs to be signed, or leave it as is.
 - Add CCs: If someone who isn't signing needs to receive a copy of the signed (docs), enter their email address.

• Add a Message: Add a short note or instructions to appear in the body of the

email your recipients receive.

osure			
WIE	Signers		 2 Signers () buyer
1. PURPOSE	tuyer hollis+bob@paperlesspipeline.com buyer 2 bollis+chorin@paperlesspipeline.com		Fields ① P Signatu II P Signir
This disclosure is provided to transactions.	Set signing order	j in real estate	II 🔗 Signa
2. WARNING Wire fraud is a serious and gra	Subject Sign Doc: Buyers Wire Fraud Warning Disclosure CC (will receive signed doc) holis+ogent@paperlesspipeline.com	il accounts and	I P Full No
- Always verify wiring instruction	Enter email addresses Message (optional) Hi,		표 온 Text 표 온 Chec
Before wiring any funds, cont	Please review and sign the attached disclosure. Cancel Send Now		II Doc T II Trans
By signing below, the undersig	ned acknowledge they have read and understood this	warning:	II 🕘 MLS N
Buyer/Seller Signature: Signature:	Date: Signing Date		Expire

Send the Request

- Click [Send Now]. Your recipients 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 automatically added to Unassigned Docs, ready to assign like any other doc.