

Send Signature Requests

With Pipeline eSign, send fast, secure, reliable signature requests. Docs flow seamlessly 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.

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
8202 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

Document Name	Added On	Reviewed
Listing Docs - visible to listing agents on this transaction and office staff		
<input type="checkbox"/> Comparative Market Analysis (CMA)	1 hr ago	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Listing Agreement	1 hr ago	<input checked="" type="checkbox"/>

 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.

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

Document Name	Added On	Reviewed
Listing Docs - visible to listing agents on this transaction and office staff		
<input type="checkbox"/> Comparative Market Analysis (CMA)	1 hr ago	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Listing Agreement	1 hr ago	<input checked="" type="checkbox"/>
<input type="checkbox"/> Property Title	1 hr ago	<input type="checkbox"/>
Reference Docs		
+ Buying / I represent the Buyer.		
- Listing / I represent the Seller.		
<input type="checkbox"/> Listing Agreement	Apr 15, 2025	<input type="checkbox"/>
<input checked="" type="checkbox"/> Sellers Agency Disclosure	Apr 16, 2025	<input checked="" type="checkbox"/>
<input type="checkbox"/> Sellers Property Disclosure Statement (SPDS)	Apr 16, 2025	<input type="checkbox"/>
<input type="checkbox"/> Lead Based Paint Disclosure	Apr 16, 2025	<input type="checkbox"/>

Select a Signer

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

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)*.

Document Text

Insert **Document Text** to fill in any standard details you're responsible for entering, such as disclaimers or other required text.

Signer Fields

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

Doc Name
Listing Agreement

Cancel Save Form

Signers
seller

Fields

- Signature
- Initials
- Signing Date
- Full Name
- Company

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 _____

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.

Doc Name
Listing Agreement

Cancel Save Form

Signers
seller

Fields

- Signature
- Initials
- Signing Date
- Full Name
- Company
- Text
- Checkbox
- Doc Text
- Transaction Name

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



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.

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.

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.

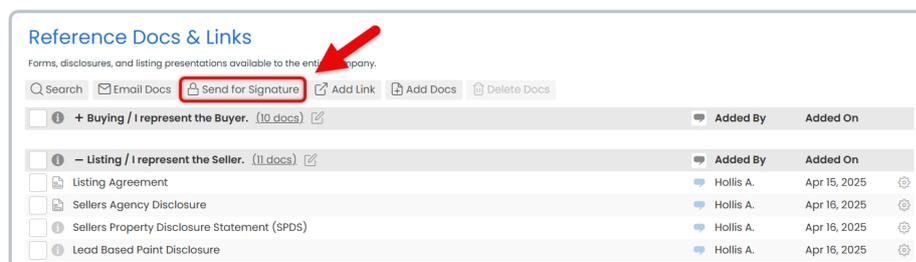
To send a signature request from the Reference Library:

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.



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.

Reference Docs & Links

Forms, disclosures, and listing presentations available to the entire company.

Search

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)

	+ Buying / I represent the Buyer. (10 docs)	Added By	Added On
	- Listing / I represent the Seller. (11 docs)		
<input checked="" type="checkbox"/>	Listing Agreement	Hollis A.	Apr 16, 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

Select a Signer

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

Doc Name: Sellers Agency Disclosure Transaction: 8181 Pine Lane

AGENCY DISCLOSURE FORM

1. PROPERTY INFORMATION
 Property Address: _____
 City: _____ State: _____ ZIP: _____

2. PURPOSE OF THIS FORM
 This form is intended to disclose the agency relationships available in a real estate transaction, and to document the specific agency relationship established between the parties.

3. TYPES OF AGENCY RELATIONSHIPS
 Seller's Agent - The real estate agent represents only the Seller.
 Buyer's Agent - The real estate agent represents only the Buyer.

2 Signers

- Jane Smith (seller)
- Alice Clark (seller 2)
-

Full Name
 Company
 Text
 Checkbox
 Doc Text
 Transaction Name
 Close Date
 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)*.

Doc Name
Listing Agreement

Cancel Save Form

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

- Signing Date
- Full Name
- Company
- Text
- Checkbox
- Doc Text
- Transaction Name
- Close Date
- MLS Number
- Listing Date
- Expiration Date
- Acceptance Date
- List Price
- Sale 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.

Doc Name
Listing Agreement

Cancel Save Form

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 _____

- Signing Date
- Full Name
- Company
- Text
- Checkbox
- Doc Text
- Transaction Name
- Close Date

Signer Fields

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

Doc Name
Listing Agreement

Cancel Save Form

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 _____

Signers
seller

- Signature
- Initials
- Signing Date
- Full Name
- 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.

Doc Name
Listing Agreement

Cancel Save Form

Signers
seller

Fields

- Signature
- Initials
- Signing Date
- Full Name
- Company
- Text
- Checkbox
- Doc Text
- Transaction Name

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



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
seller

Fields

- Signature
- Initials
- Signing Date
- Full Name
- Company
- Text
- Checkbox
- Doc Text
- Transaction Name

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

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.

The screenshot shows a 'Signers' dialog box overlaid on a document. The dialog has a blue header and contains the following fields and options:

- Signers:** A list of two signers: 'buyer' (email: hollis+bob@paperlesspipeline.com) and 'buyer 2' (email: hollis+gloria@paperlesspipeline.com). Arrows indicate they can be reordered.
- Set signing order:** A checked checkbox.
- Subject:** A text field containing 'Sign Doc: Buyers Wire Fraud Warning Disclosure'.
- CC (will receive signed doc):** A text field containing 'hollis+agent@paperlesspipeline.com' with a placeholder 'Enter email addresses' below it.
- Message (optional):** A text area containing 'Hi, Please review and sign the attached disclosure.'
- Buttons:** 'Cancel' and 'Send Now'.

The background document is partially visible, showing sections: '1. PURPOSE', '2. WARNING', and '3. ACKNOWLEDGMENT'. The 'WARNING' section includes the text: 'Wire fraud is a serious and gr... send fraudulent wiring instructi... - Always verify wiring instructi... - Do not rely solely on email to... - Before wiring any funds, com...'. The 'ACKNOWLEDGMENT' section includes: 'By signing below, the undersigned acknowledge they have read and understood this warning: Buyer/Seller Signature: Signature Date: Signing Date'.

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.