

# Sending eSign Requests

With Pipeline eSign, send fast, secure, and reliable signature requests. Documents flow smoothly from Paperless Pipeline to your signers and come back automatically, signed and ready to go.

## Introduction

Send secure, reliable signature requests without leaving Paperless Pipeline or interrupting your existing workflow using Pipeline eSign.

Start from a transaction to automatically pull in 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 transaction.

For each request, add signers, drag fields exactly where they're needed, and insert fields that autofill transaction information to save time and reduce errors. Customize the signing experience by setting a signing order, adding CCs, and including a personal message.

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

## How It Works

### Pick Your Starting Point

Start from a transaction to automatically pull in 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 transaction.

### Choose Docs and Signers

Choose the documents that need to be signed and who needs to sign them. You can select agents, assistants, contacts, or outside parties, whatever the deal calls for.

Each signature request can contain any number of docs, signers, and signatures.

### Place the Fields

Choose what information should be displayed on the doc and what the signer needs to enter.

Let the system fill in important details from the transaction to save time and avoid mistakes.

### Send with Confidence

Set a signing order if needed, add CCs, and include a personal message. After you click send, Pipeline takes care of the rest.

### A Smooth Signing Experience

Signers get a secure link with just the fields they need to fill out. It's a smooth, straightforward experience that works on any device.

## Get Signed Docs Back Instantly

Once all parties have signed, the signed document is automatically returned to Paperless Pipeline in Unassigned Docs, ready to be assigned like any other doc.

## Send a Signature Request from Reference

Send a signature request from the Reference Library to request a signature that isn't tied to a specific transaction.

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

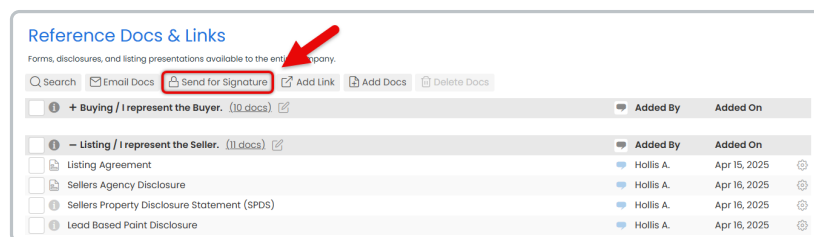
To send a signature request from the Reference Library:

### Go to Your Reference Library

- Click [Reference] from the top menu.

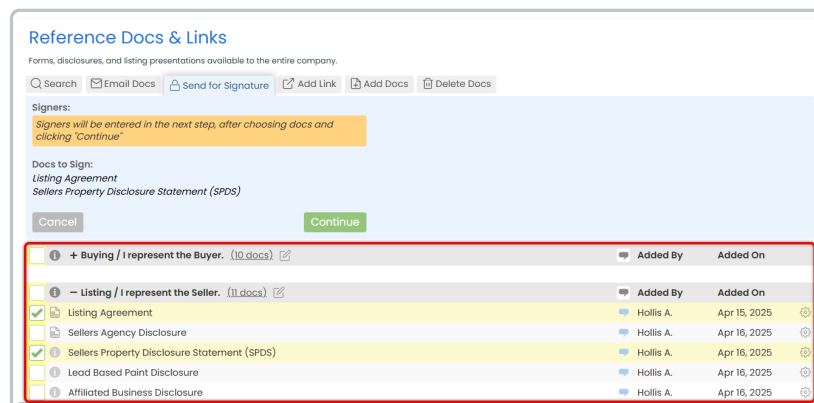
### Start the Signature Request

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

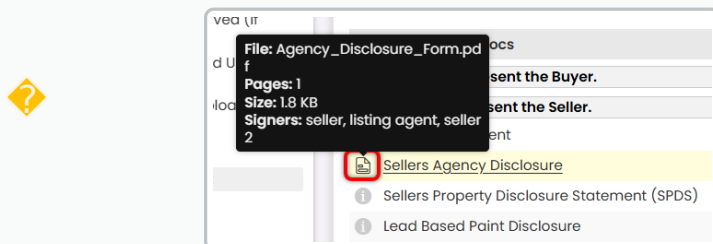


### Select Docs to be Signed

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



If a doc in your Reference Library has a form, you'll see a form icon in the "i" column. Hover over it to instantly view document information, including signers and page count.



### Place Fields for the First Party

- If you're using a Form, confirm the prefilled details and place any additional fields needed.
- Drag the necessary fields onto the doc from the *Fields* section on the right (outlined below).



Need to pause? You can save your request as a draft at any time – just click [Save as Draft] in the upper right corner while editing. [Learn more.](#)

### Transaction Info

Insert **Transaction Info** fields for deal-specific details like *Transaction Name*, *Listing Date*, and *Buyer Name(s)*.



Want *Transaction Info* fields to autofill? [Send the request from a transaction](#) instead.



### Document Text

Insert **Document Text** to fill in any standard details you're responsible for

entering, such as disclaimers or other required text.

**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

Right-hand sidebar fields: Initials, Signing Date, Full Name, Text, Checkbox, Select, Radio, Checkbox Group, **Doc Text**, Transaction Name, Close Date.

#### Signer Fields

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

**EXCLUSIVE RIGHT-TO-SELL LISTING AGREEMENT**

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**Seller:** \_\_\_\_\_ ("Seller") with a mailing address of \_\_\_\_\_, City of \_\_\_\_\_, State of \_\_\_\_\_

AND

Right-hand sidebar fields: Signers (First Party), Fields (Signature, Initials, Signing Date, Full Name, Text, Checkbox).

#### Flexible Fields

Insert flexible fields that can be completed by either the sender or signer, depending on who has the information.

- Add **Full Name** to automatically pull the signer's details directly from the transaction.
- Add a **Text** field when you need a flexible space that either the sender or signer can fill in with custom information.
- Add a **Checkbox** field whenever it will be needed on the form.
- Add a **Select**, **Radio**, or **Checkbox Group** to offer predefined choices. Copy and paste your first option for easy placement of subsequent options.

**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

Right-hand sidebar fields: Signers (First Party), Fields (Signature, Initials, Signing Date, Full Name, Text, Checkbox, Select, Radio, Checkbox Group, Doc Text, Transaction Name).

### Repeat for Additional Signers

- Use the Signers dropdown to add and select additional signers, one at a time.
- Place only the fields that apply to the selected signer.

The screenshot shows a document titled "L LISTING AGREEMENT" with the text "Agreement ("Agreement") made on". A red arrow points to the "Signers" dropdown menu. The menu is open, showing a list of signers: "Second Party" (selected), "First Party", and "Add Third Party". Below the list, there are checkboxes for "Signing Date" and "Full Name". The "Signers" dropdown is highlighted with a red box.

### Confirm & Customize Request

- Once ready, click [Send] in the upper right corner.
- Optionally, customize the signing flow, include non-signers, or add a personal message (outlined below).

#### Add Signers Email

Enter the email address for each signer as First Party, Second Party, and so on.

The screenshot shows the "Signers" form. It has a blue header with the word "Signers". Below the header, there are two sections: "First Party" and "Second Party". Each section has a text input field for an email address. The "First Party" field contains "hollis+seller@paperlesspipeline.com" and the "Second Party" field contains "hollis+buyingagent@paperlesspipeline.com". At the bottom, there is a checkbox labeled "Set signing order" which is currently unchecked.

#### 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.

The screenshot shows the "Signers" form with the "Set signing order" checkbox checked. The signers are listed in a specific order: "Second Party" (with a double-headed arrow icon to its left) and "First Party" (with a double-headed arrow icon to its left). The email addresses are the same as in the previous screenshot. The "Set signing order" checkbox is now checked, indicated by a green checkmark.

### Subject

Customize the email subject to reflect the docs to be signed, or leave it as is.

A screenshot of a form field labeled "Subject". The text inside the field is "Sign Docs for: 9062 Birch Way - Counter Offer".

Subject  
Sign Docs for: 9062 Birch Way - Counter Offer

### CC

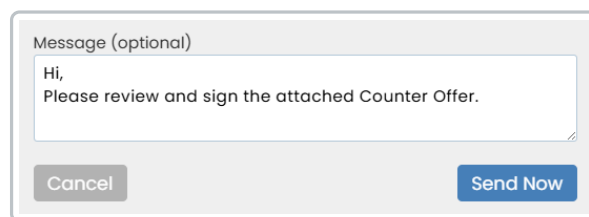
If anyone who isn't signing needs to receive a copy of the signed doc, enter their email address(es).

A screenshot of a form field labeled "CC (will receive signed doc)". The text inside the field is "hollis+agent@paperlesspipeline.com". Below the field is the placeholder text "Enter email addresses".

CC (will receive signed doc)  
hollis+agent@paperlesspipeline.com  
Enter email addresses

### Message

Add a short note or instructions to appear in the body of the email your recipients receive.

A screenshot of a form field labeled "Message (optional)". The text inside the field is "Hi, Please review and sign the attached Counter Offer." Below the field are two buttons: "Cancel" and "Send Now".

Message (optional)  
Hi,  
Please review and sign the attached Counter Offer.  
Cancel Send Now

### Send the Request

- Click [Send Request]. Signers will receive an email with a secure link to review and sign from any device.
- When all signatures are complete, a final copy will be automatically returned to Pipeline in Unassigned Docs. A final copy will also be emailed to you and all recipients.

## Send a Signature Request from Transactions

Send a signature request directly from a transaction to choose signers effortlessly, have transaction details autofilled, 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 you need to take action.

## Start the Signature Request

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

## Select Signers

- Check boxes next to people who need to sign from the *Agents* or *Contacts* area.

## 8181 Pine Lane

Added on Dec 5, 2024 by Hollis Admin  
Last updated 1 hour ago by Hollis Admin

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Sale & Commission

**List Price:** \$489,452

**Listing Agents**

<b>Sarah Goode</b>	<a href="mailto:hollis+sarah.goode@paperlesspipeline.com">hollis+sarah.goode@paperlesspipeline.com</a>	(555) 223-7898
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**- 2 Contacts**

<b>Jane Smith, Seller</b> <small>101 Doc Signing Road</small>	<a href="mailto:hollis+jane@paperlesspipeline.com">hollis+jane@paperlesspipeline.com</a>	(555) 555-4345               (555) 555-4000
<b>Alice Clark, Seller</b> <small>8202 Maple Circle</small>	<a href="mailto:hollis+alice@paperlesspipeline.com">hollis+alice@paperlesspipeline.com</a>	(555) 555-2342

Note / Email
 Add Contact
 Send for Signature
 Merge Docs
 Upload Docs

**Signers:**

Check the orange boxes of signers above.

**Docs to Sign:**

Check yellow boxes of docs below in your preferred order.

Cancel

Continue

**List Docs** Document Name ▾

Added On ▾

Reviewed ▾

- Listing Docs - visible to listing agents on this transaction and office staff

Comparative Market Analysis (CMA)

Cont... Listing Agreement

1 hr ago

1 hr ago

✓

✓

⌵


⌵


### Select Docs to be Signed


- Check boxes next to the docs you want to include in the request. Choose from the list of transaction documents or Reference Docs.
- Click [Continue] to initiate the request.

8181 Pine Lane

Added on Dec 5, 2024 by Hollis Admin  
Last updated 1 hour ago by Hollis Admin


Alice Clark, Seller  
8202 Maple Circle


[hollis+alice@paperlesspipeline.com](mailto:hollis+alice@paperlesspipeline.com)


(555) 555-2342

Note / Email

+ Add Contact

✍ Send for Signature

📎 Merge Docs

📄 Upload Docs

🗑

🔍 Search Docs

Signers:

Alice Clark [hollis+alice@paperlesspipeline.com](mailto:hollis+alice@paperlesspipeline.com)  
Jane Smith [hollis+jane@paperlesspipeline.com](mailto:hollis+jane@paperlesspipeline.com)

Docs to Sign:

Sellers Agency Disclosure

Cancel

Continue

📄 ⓘ Label Document Name

🗨 Added On

📝 Reviewed

– Listing Docs – visible to listing agents on this transaction and office staff

📄 ⓘ Comparative Market Analysis (CMA)

🕒 1 hr ago

✅

⚙

📄 ⓘ Cont Listing Agreement

🕒 1 hr ago

✅

⚙

📄 ⓘ Property Title

🕒 1 hr ago

❌

⚙

📄 ⓘ – Reference Docs

🗨 Added On

+ Buying / I represent the Buyer.

– Listing / I represent the Seller.

📄 ⓘ Listing Agreement

🕒 Apr 15, 2025

⚙

✅ 📄 ⓘ Sellers Agency Disclosure

🕒 Apr 16, 2025

⚙

📄 ⓘ Sellers Property Disclosure Statement (SPDS)

🕒 Apr 16, 2025

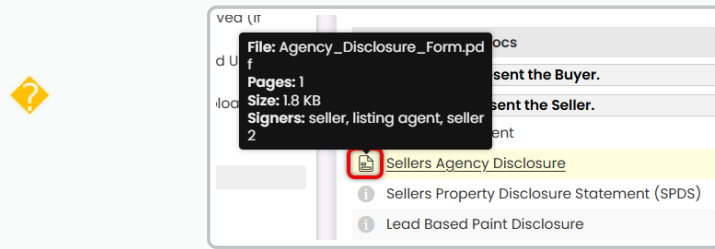
⚙

📄 ⓘ Lead Based Point Disclosure

🕒 Apr 16, 2025

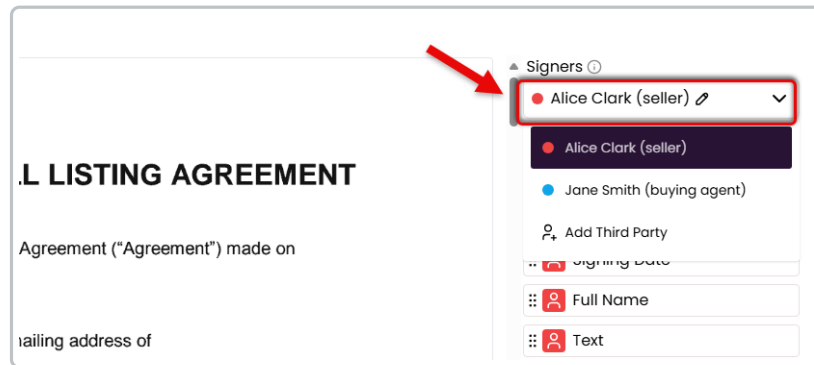
⚙

If a doc in your Reference Library has a form, you'll see a form icon in the "i" column. Hover over it to instantly view document information, including signers and page count.



### Select a Signer

- Choose the first person who will sign using the *Signers* dropdown in the right menu.



### Place Fields for the Signer

- If you're sending a Form, confirm the fields that have already been placed. If needed, make any necessary adjustments.
- Drag the necessary fields onto the doc from the *Fields* section on the right (outlined below).



Need to pause? You can save your request as a draft at any time – just click [Save as Draft] in the upper right corner while editing. [Learn more.](#)

### Autofilled Transaction Info

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



**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 Agreement, another agent from the Agency may be appointed during the term of this Agreement.

**II. Real Property.** The real property, that is the subject of this Agreement, is located at the street address of \_\_\_\_\_

**Field Types:**

- Initials
- Signing Date
- Full Name
- Text
- Checkbox
- Select
- Radio
- Checkbox Group
- 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.

**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

**Field Types:**

- Initials
- Signing Date
- Full Name
- Text
- Checkbox
- Select
- Radio
- Checkbox Group
- Doc Text
- Transaction Name
- Close Date

#### Signer Fields

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

**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:**

- Alice Clark (seller)

**Fields:**

- Signature
- Initials
- Signing Date
- Full Name
- Text

#### Flexible Fields

Insert flexible fields that can be completed by either the sender or signer, depending on who has the information.

- Add **Full Name** to automatically pull the signer's details directly from the transaction.
- Add a **Text** field when you need a flexible space that either the sender or signer can fill in with custom information.
- Add a **Checkbox** field whenever it will be needed on the form.
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Seller: \_\_\_\_\_ ("Seller") with a mailing address of \_\_\_\_\_, City of \_\_\_\_\_, State of \_\_\_\_\_

AND

Signers dropdown menu options: Initials, Signing Date, Full Name, Text, Checkbox, Select, Radio, Checkbox Group, Doc Text, Transaction Name, Close Date.

### Repeat for Additional Signers

- Use the *Signers* dropdown to add and select additional signers, one at a time.
- Place only the fields that apply to the selected signer.

**I. LISTING AGREEMENT**

Agreement ("Agreement") made on \_\_\_\_\_

Mailing address of \_\_\_\_\_

Signers dropdown menu options: Alice Clark (seller), Jane Smith (buying agent), Add Third Party, Full Name, Text.

### Confirm & Customize Request

- Once ready, click [Send] in the upper right corner.
- Optionally, customize the signing flow, include non-signers, or add a personal message (outlined below).

#### 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.

**Signers**

Bitty Kabobs (seller)  
hollis+bob@paperlesspipeline.com

Gloria Witherspoon (buyer)  
hollis+gloria@paperlesspipeline.com

☒ Set signing order

#### Subject

Customize the email subject to reflect the docs to be signed, or leave it as is.

**Subject**

Sign Docs for: 9062 Birch Way - Counter Offer

If anyone who isn't signing needs to receive a copy of the signed doc, enter their email address(es).



CC (will receive signed doc)

hollis+agent@paperlesspipeline.com

Enter email addresses

#### Message

Add a short note or instructions to appear in the body of the email your recipients receive.



Message (optional)

Hi,  
Please review and sign the attached Counter Offer.

Cancel Send Now

#### 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 all recipients. It will also be automatically added to Unassigned Docs, ready to assign like any other doc.

## Manage Sent Requests

Manage Your eSign Requests

**Learn how to [Manage Your eSign Requests](#)**

Manage Company-Wide eSign Requests

**Learn how to [Manage Company-Wide eSign Requests](#)**