

Request Signatures via DocuSign

You can use Pipeline's integration with DocuSign to easily send signature requests from Pipeline and automatically receive signed docs back in Pipeline. [Learn more about DocuSign & Pipeline →](#)

Send DocuSign signature requests in Pipeline from a transaction, the *Unassigned* page, or the *Reference* page.

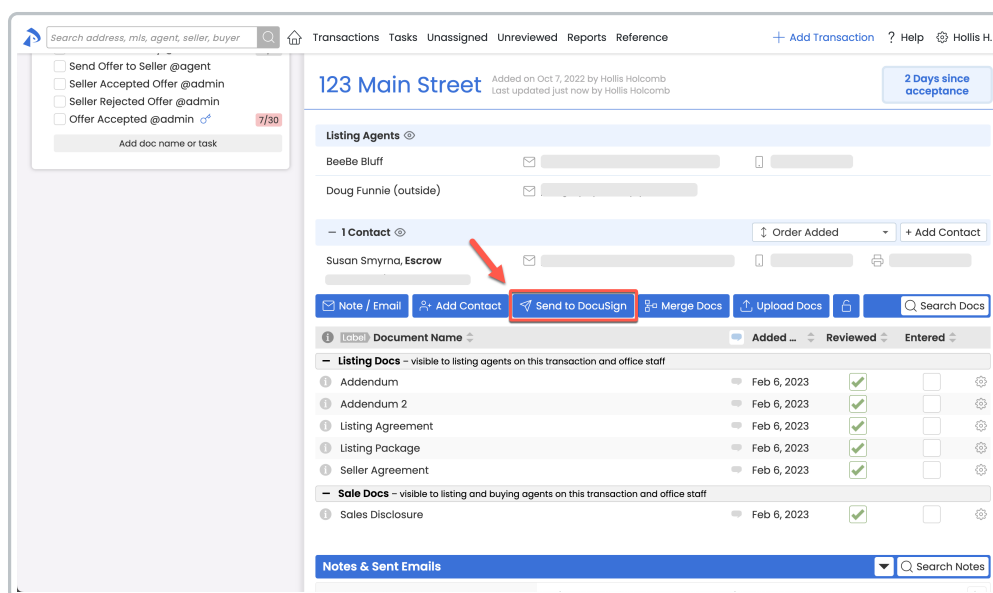
Send a Signature Request from a Transaction

Send a signature request from a transaction via DocuSign and automatically receive executed docs back in Pipeline.

Who Can Do This? Anyone with a [DocuSign](#) account that is connected to Paperless Pipeline.

To send a DocuSign signature request from a transaction:

- 1 Go to the Transaction**
 - Open the transaction where you need to take action.
- 2 Click [Send to DocuSign] below the sections for *Agents* and *Contacts*.**



- 3 Enter an *Envelope Subject* to name the DocuSign Envelope.**

123 Main Street

Added on Jun 30, 2022 by Hollis Holcomb
 Last updated 24 minutes ago by Hollis Holcomb

407 Days on market

Listing Agents

Elijah McCoy

hollis+elijahm@paperlesspipeline.com

555-555-5555

Buying Agents

John Jacob

kristian+summary@paperlesspipeline.com

(890) 123-4567

2 Contacts

Order Added

+ Add Contact

Leonardo, Buyer

hollis+l@paperlesspipeline.com

555-555-5555

Turtle

Jack Stewart, Attorney

hollis+try@paperlesspipeline.com

585-380-4520

Note / Email

Add Contact

Send to DocuSign

Merge Docs

Upload Docs

Search Docs

Envelope Subject:

Please sign docs for 123 Main Street

Signers:

Check the orange boxes of signers above.

Docs to Sign:

Check the yellow boxes of docs below.

Cancel

Send to DocuSign

Document Name

Added

Reviewed

Entered

Office Docs - visible to office staff

Agreement

Sep 12, 2022

Office Financial Disclosure

Aug 23, 2022

Office Privacy Disclosure

Aug 23, 2022

- Check the orange boxes next to your desired signers from the Agents and Contacts section above.

123 Main Street

Added on Jun 30, 2022 by Hollis Holcomb
 Last updated just now by Hollis Holcomb

407 Days on market

Listing Agents

Elijah McCoy

hollis+elijahm@paperlesspipeline.com

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Buying Agents

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585-380-4520

Note / Email

Add Contact

Send to DocuSign

Merge Docs

Upload Docs

Search Docs

Envelope Subject:

Please sign docs for 123 Main Street

Signers:

John Jacob kristian+summary@paperlesspipeline.com
 Leonardo hollis+l@paperlesspipeline.com

Docs to Sign:

Check the yellow boxes of docs below.

Cancel

Send to DocuSign

Document Name

Added

Reviewed

Entered

Office Docs - visible to office staff

Agreement

Sep 12, 2022

Office Financial Disclosure

Aug 23, 2022

Office Privacy Disclosure

Aug 23, 2022

- Click the yellow boxes next to the docs to send for signature.

Note / Email Add Contact Send to DocuSign Merge Docs Upload Docs Search Docs

Envelope Subject:
Please sign docs for 123 Main Street

Signers:
John Jacob kristian+summary@paperlesspipeline.com
Leonardo hollis+!@paperlesspipeline.com

Docs to Sign:
Office Financial Disclosure
Office Privacy Disclosure

Cancel Send to DocuSign

Label	Document Name	Added ...	Reviewed	Entered
Office Docs – visible to office staff				
☐	Agreement	Sep 12, 2022	☐	☐
☒	Office Financial Disclosure	Aug 23, 2022	☐	☐
☒	Office Privacy Disclosure	Aug 23, 2022	☐	☐
Listing Docs – visible to listing agents on this transaction and office staff				
☐	Agreement (#2)	Feb 9, 2023	☐	☐
☐	Keybox Authorization	Aug 23, 2022	☐	☐
☐	Lead-based Paint Disclosure	Aug 23, 2022	☐	☐

6 Click [Send to DocuSign] to continue your request.

Note / Email Add Contact Send to DocuSign Merge Docs Upload Docs

Envelope Subject:
Please sign docs for 123 Main Street

Signers:
John Jacob kristian+summary@paperlesspipeline.com
Leonardo hollis+!@paperlesspipeline.com

Docs to Sign:
Office Financial Disclosure
Office Privacy Disclosure

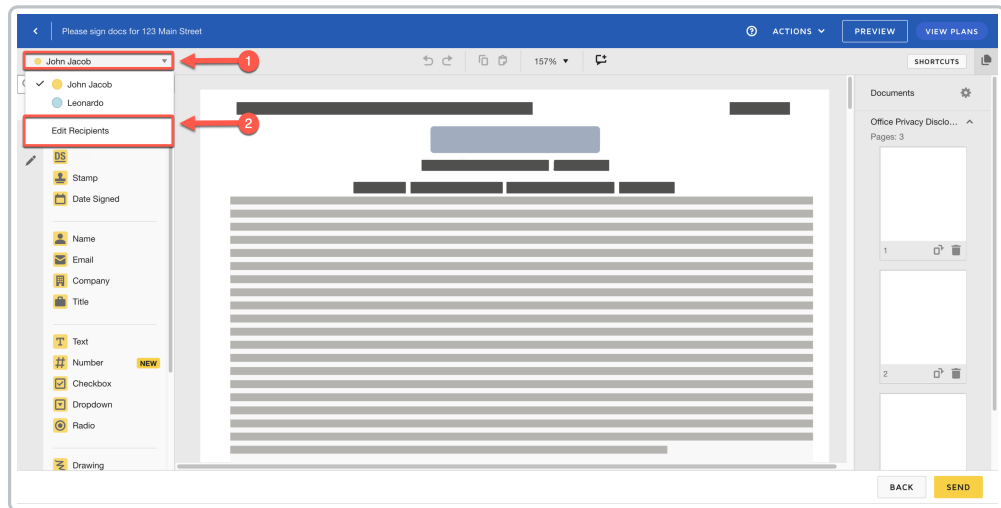
Cancel Send to DocuSign

Label	Document Name
Office Docs – visible to office staff	
☐	Agreement
☒	Office Financial Disclosure
☒	Office Privacy Disclosure

7 Specify who should receive the DocuSign Envelope and what actions they should take.

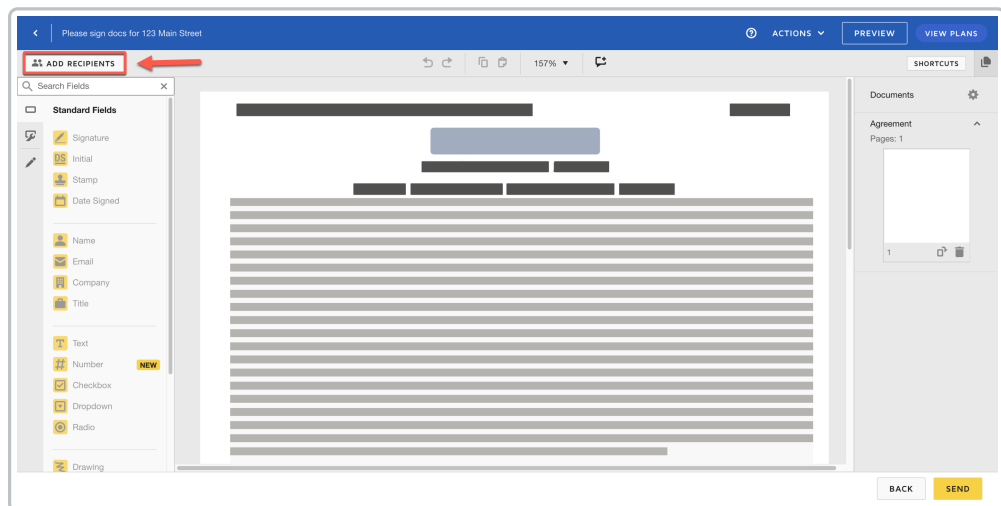
- If you already selected recipients from the transaction

If needed, add more recipients or make changes to your preferences for recipients by clicking the dropdown for [Recipients] in the upper left corner, then [Edit Recipients].



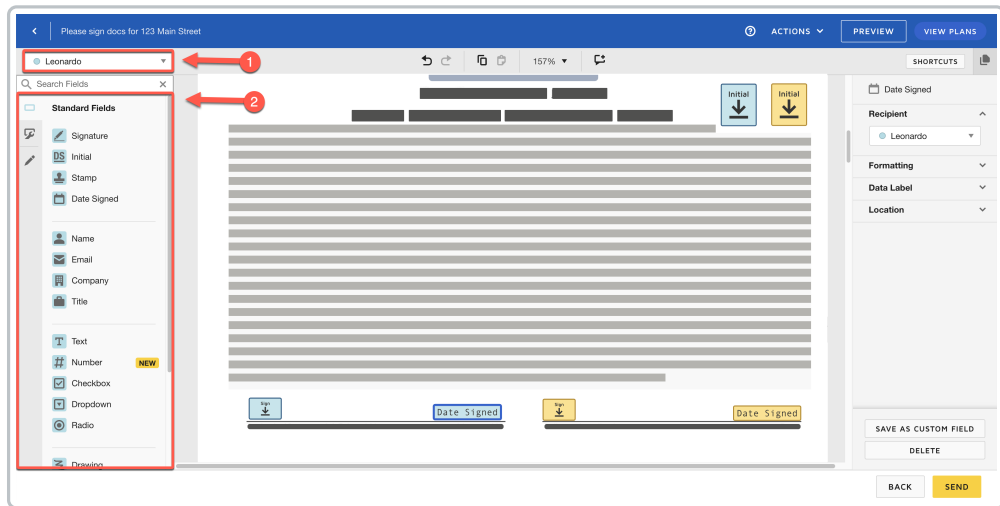
- **If you did not select recipients from the transaction**

Add your desired recipients and set your preferences for them by clicking [Add Recipients].

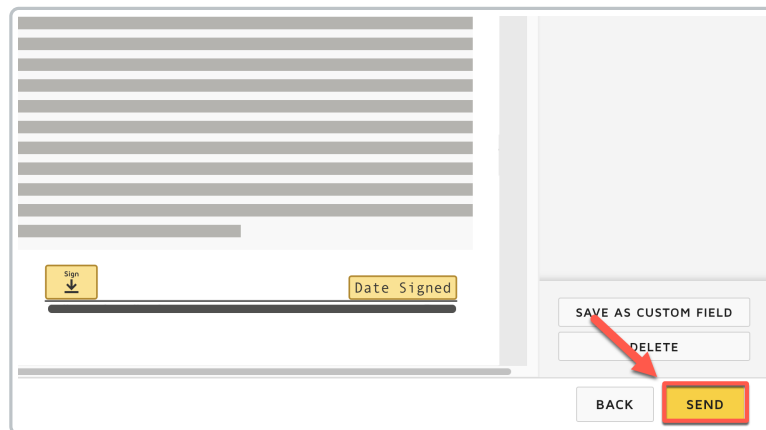


8 Complete the request for each recipient:

- **Select a recipient** from the Recipients dropdown menu in the upper left corner.
- **Drag and drop the signing fields** and other information needed to your desired position within the docs.



- 9 Click [Send] when you have completed your request.



Once the signers complete your request, the executed document will appear automatically on the [Unassigned](#) page. At that point, the doc will be pre-assigned to the transaction and you can assign it like any other doc.

[Learn how to Assign Docs](#) →

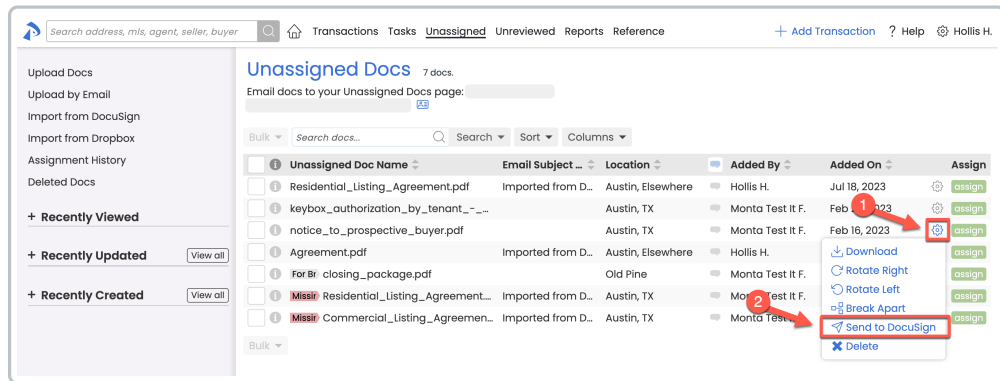
Send a Signature Request from Unassigned

Send a signature request from the *Unassigned* page via DocuSign and automatically receive executed docs back in Pipeline.

Who Can Do This? Anyone with a [DocuSign](#) account that is connected to Paperless Pipeline.

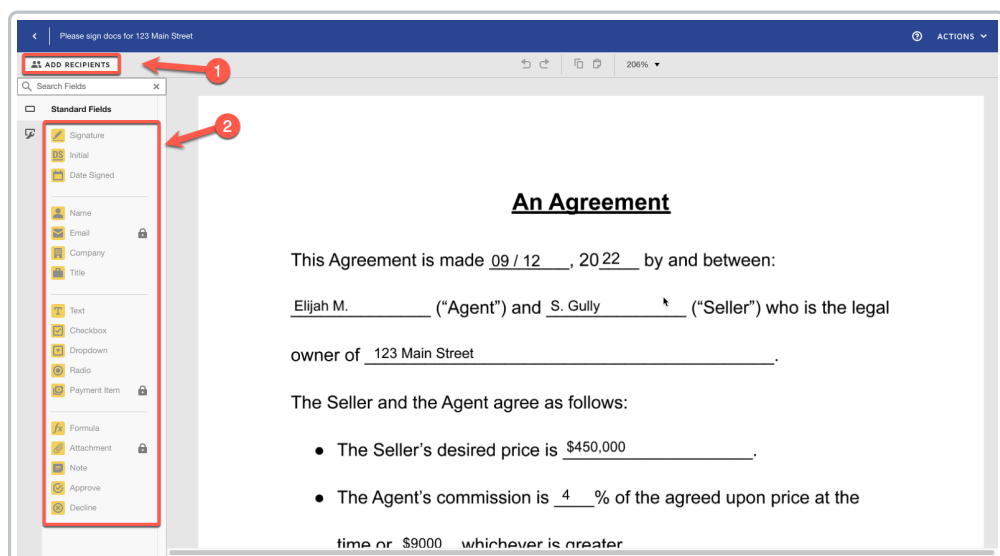
To send a DocuSign signature request from the *Unassigned* page:

- 1 Go to the **Unassigned** page by clicking [Unassigned] from the top menu.
- 2 Next to the doc you want to send for signature, click the [⚙️], then click [Send to DocuSign] and [Send] to confirm.



- 3 Complete the signature request:

- Click [Add Recipients] in the upper left corner to add your desired recipients.
- Drag and drop the signing fields and other information needed to your desired position within the docs.
- Repeat for each signer as needed.



- 4 Click [Send] when you have completed your request.

[Learn how to Assign Docs →](#)

Send a signature request from the *Reference* page via DocuSign and automatically receive executed docs back in Pipeline.

To send a DocuSign signature request from the *Reference* page:

- [Transactions](#)

[Tasks](#)

[Unassigned](#)

[Unreviewed](#)

[Reports](#)

[Reference](#)

[+ Add](#)

Upload Docs

+ Recently Viewed

+ Recent Lookups

+ Recently Updated View all

+ Recently Created View all

Reference Docs & Links

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

☐	- Awards & Recognition (2 docs)		Added By	Added On
☐	2023 Awards & Recognition		Hollis H.	Jul 31, 2023
☐	2023 Winner Announcement		Hollis H.	Dec 10, 2018
☐	+ Company Images (2 docs)		Added By	Added On
☐	- Contract Forms (5 docs)		Added By	Added On
☐	Listing Contract		Hollis H.	Aug 5, 2021
☐	Lead Based Paint Disclosure		Hollis H.	Jun 27, 2018
☐	Purchase Contract		Hollis H.	Apr 17, 2019

- 3 Check the yellow boxes next to the docs to send for signature, then click [Send to DocuSign].

Reference Docs & Links

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

Search

Envelope Subject

Please sign these documents

Docs to Sign:
Seller's Disclosure

☐	+ Agreement Forms (5 docs)		Added By
☐	- Contract Forms (6 docs)		Added By
☒	Seller's Disclosure		Hollis H.
☐	Buyer's Agreement		Hollis H.
☐	Lead Based Paint Disclosure		Hollis H.

4 Complete the signature request:

- Click [Add Recipients] in the upper left corner to add your desired recipients.
- Drag and drop the signing fields and other information needed to your desired position within the docs.
- Repeat for each signer as needed.

Please sign docs for 123 Main Street

ADD RECIPIENTS

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio
- Payment Item
- Formula
- Attachment
- Note
- Approve
- Decline

An Agreement

This Agreement is made 09 / 12 , 2022 by and between:

Elijah M. ("Agent") and S. Gully ("Seller") who is the legal owner of 123 Main Street.

The Seller and the Agent agree as follows:

- The Seller's desired price is \$450,000.
- The Agent's commission is 4 % of the agreed upon price at the time or \$9000 whichever is greater.

5 Click [Send] when you have completed your request.

Once the signers complete your request, the executed document will appear automatically on the [Unassigned](#) page and you can assign it to a transaction like any other doc.

[Learn how to Assign Docs →](#)