DocuSign Integration

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Connect your own DocuSign account to Pipeline and send documents for signature without leaving a transaction — signed copies come back on their own.

Introduction

DocuSign is a separate e-signature service, and Pipeline plugs into it. Once your profile is connected, you can pick documents off a transaction, the Unassigned page, or the Reference page and push them into DocuSign for signature without downloading anything.

When every signer is finished, the executed document comes back to Pipeline on its own and waits in Unassigned. If you sent it from a transaction, it arrives already pre-assigned to that transaction.

The piece people miss most often: the connection belongs to a **person**, not to your company's account. Your office admin connecting doesn't connect you, and your connection doesn't connect your transaction coordinator.

How It Works

Two things have to be true before you can send: you have your own DocuSign account, and your Pipeline profile is connected to it.

The Connection Is Yours, Not Your Account's

Every person who wants to send through DocuSign connects their own Pipeline profile, from their own settings. No Pipeline permission is involved — master admins and agents connect exactly the same way, and there's nothing an admin has to switch on first.

Your Pipeline login email address and your DocuSign email address don't have to match. You can connect your profile to whichever DocuSign account you sign in with.

What You Need

An active DocuSign subscription of your own. Connecting from Pipeline's side costs nothing, but Pipeline doesn't include DocuSign, doesn't resell it, and doesn't cover the cost of your envelopes — DocuSign bills you directly, and only DocuSign can change or cancel that subscription.

Where You Can Send From

Three places, once you're connected: a transaction, the *Unassigned* page, and the *Reference* page. Sending from a transaction is the one that carries context — Pipeline offers the agents and contacts already on the deal as signers, and the returning document knows which transaction it belongs to.

How Signed Docs Come Back

Completed documents return automatically to the *Unassigned* page, where you assign them like anything else that arrives. Send several documents in one envelope and they come back as a single combined PDF rather than separate files.

Whichever way a signed doc arrives, filing it is the same job:

A doc has landed in Unassigned and now it needs a home. Assigning is the step that puts it on the right transaction, with the right name and the right permission category.

See Doc Assignment

Pull In Docs Already in DocuSign

You don't have to send from Pipeline to get a document back. If it's already in your DocuSign Inbox, pull it into Unassigned with **Import from DocuSign** on the Unassigned page.

Connect to DocuSign

> Link your own DocuSign account to your Pipeline profile so you can send signature requests and receive signed docs.

> **Who Can Do This**: Anyone with their own DocuSign account. No Pipeline permission is needed, and admins and agents connect the same way.

To connect your DocuSign account to Pipeline:

1. Click the [Gear] in the upper-right corner, then [My Info].
2. Select [DocuSign] from the *Integrations* section of the left menu.
3. Click [Get Started], then follow the prompts to finish the connection.

Your profile is connected. [Send to DocuSign] now appears on transactions, the *Unassigned* page, and the *Reference* page, and [Import from DocuSign] appears on the *Unassigned* page.

Send a Signature Request From a Transaction

> Send docs that are already on a transaction out for signature, and get the executed copy back pre-assigned to that same transaction.

> **Who Can Do This**: Anyone whose Pipeline profile is connected to DocuSign.

To send a signature request from a transaction:

1. Open the transaction you're sending docs from.

2. Click [Send to DocuSign], below the sections for *Agents* and *Contacts*.

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

4. Check the boxes next to your signers in the *Agents* and *Contacts* sections above.

5. Click the boxes next to the docs you're sending for signature.

6. Click [Send to DocuSign] to continue into DocuSign.

7. Set your recipients. Click [Recipients] in the upper-left corner, then [Edit Recipients] to adjust the ones carried over from the transaction — or [Add Recipients] if you didn't select any in Pipeline.

8. Select each recipient from the *Recipients* menu, then drag the signing fields onto the docs.

9. Click [Send].

Once every signer finishes, the executed document appears on the *Unassigned* page, already pre-assigned to the transaction.

Send a Signature Request From the Unassigned Page

> Send a doc that's waiting in Unassigned out for signature before you file it anywhere.

> **Who Can Do This**: Anyone whose Pipeline profile is connected to DocuSign.

To send a signature request from the Unassigned page:

1. Click [Unassigned] from the top menu.

2. Next to the doc you're sending, click the [Gear], then [Send to DocuSign] and [Send] to confirm.

3. Click [Add Recipients] in the upper-left corner of DocuSign to add your signers.

4. Drag the signing fields onto the docs, repeating for each signer.

5. Click [Send].

The executed document returns to the *Unassigned* page when the request is complete, ready to assign to a transaction.

Send a Signature Request From the Reference Page

Send a blank form out of your company's reference library for signature, without attaching it to a transaction first.

Who Can Do This: Anyone whose Pipeline profile is connected to DocuSign.

To send a signature request from the Reference page:

1. Click [Reference] from the top menu.
2. Click [Send to DocuSign].
3. Check the boxes next to the docs you're sending for signature, then click [Send to DocuSign].
4. Click [Add Recipients] in the upper-left corner of DocuSign, then drag the signing fields onto the docs. Repeat for each signer.
5. Click [Send].

The executed document returns to the *Unassigned* page, ready to assign to a transaction.

Import Docs From Your DocuSign Inbox

Bring documents that are already in DocuSign into Pipeline, without sending them from Pipeline first.

Who Can Do This: Anyone whose Pipeline profile is connected to DocuSign.

To import docs from your DocuSign Inbox:

1. Click [Unassigned] from the top menu.
2. Click [Import from DocuSign] from the left menu.

3. Check the boxes next to the docs you want, then click [Import Docs].

4. Wait about 30 seconds, then refresh the *Unassigned* page.

The docs you selected appear in *Unassigned Docs*, ready to assign.

Disconnect From DocuSign

> Break the link between your Pipeline profile and your DocuSign account.

> **Who Can Do This**: Anyone whose Pipeline profile is connected to DocuSign.

To disconnect from DocuSign:

1. Click the [Gear] in the upper-right corner, then [My Info].

2. Select [DocuSign] from the *Integrations* section of the left menu.

3. Click [Disconnect from DocuSign].

Sending and importing stop for your profile. You can connect to DocuSign again at any time.

Sign Without a Second Subscription

This integration assumes every person who sends has a DocuSign subscription of their own, which is what makes it awkward to roll out past one or two people. Pipeline has its own signing, switched on once for the whole account.

Send a document out for signature without leaving Pipeline — start from a transaction, from your Reference Library, or from a file on your computer.

See Sending eSign Requests

DocuSign Integration FAQ

Connecting is free on Pipeline's side and happens one person at a time, but the DocuSign subscription is your own. Answers to the common questions about cost, who can use it, and where signed documents land. See DocuSign Integration FAQ.

DocuSign Integration Troubleshooting

Buttons missing, connection dropped, or an error when you send? Start here.

- DocuSign Isn't Working in Pipeline