Get a Contract Signed Without Leaving the Transaction

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Send the paperwork out of the transaction it belongs to, let DocuSign collect the signatures, and the executed copy comes back to the same deal on its own.

Introduction

The signature run is one of the few places where a transaction has to leave Pipeline and come back, and almost every problem offices hit with it comes from the return trip rather than the send. Done through the integration, the loop closes itself: you pick the docs and the signers off the transaction, DocuSign collects, and the finished document arrives back in Pipeline already tied to the deal.

Two things shape the setup before you start. The connection belongs to a person, not to your company — your admin connecting theirs does nothing for yours. And the send finishes in DocuSign: Pipeline gathers the envelope and the signers, then hands you over to place the signing fields and press send, because that part is DocuSign's job and always has been.

When to Use This

- You're sending a purchase agreement, addendum, or disclosure out for signature and want the signed copy filed without a download-and-re-upload.
- Your office admin set up DocuSign but there's no [Send to DocuSign] button on your screen.
- Signed documents are arriving at your maildrop as a link instead of an attachment, and nothing lands in Pipeline.
- You have envelopes already sitting in DocuSign that need to get onto transactions.
- You send the same form on every deal and you're placing the same signature fields every time.

Why This Beats Emailing the Signed Copy In

The habit most offices bring with them is to let DocuSign email the completed envelope to the transaction's maildrop address. It works beautifully until a packet gets big — and then DocuSign quietly stops attaching the file and sends a download link instead, which happens once the total attachment size passes about 5MB. Pipeline processes attachments, not links, so nothing arrives. No error, no bounce; the document just isn't there, and usually nobody notices until someone goes looking for it at closing.

The integration doesn't have that ceiling, because the document never travels by email. Signed copies come back through the connection itself, and a document sent from a transaction returns already pointed at that transaction.

1. Connect Your Own DocuSign Account

This is per person, and it's the step people skip because someone else in the office already did it. There's no Pipeline permission involved — master admins and agents connect exactly the same way, from their own settings — and no account-wide switch an admin turns on first.

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

See DocuSign Integration

> The DocuSign option appears in everyone's settings whether they use it or not, and there's no way to hide it. It does nothing until someone connects an active DocuSign subscription of their own, so an agent who hasn't can't send anything by finding the button.

2. Put Your Signers on the Transaction First

When you send from a transaction, Pipeline offers the agents and contacts already on the deal as your signers — so a buyer who was never added as a contact isn't there to check. Adding them first turns the signer step into three clicks instead of retyping names and addresses into DocuSign.

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See Adding a Contact

3. Send From the Transaction, Then Finish in DocuSign

Sending from the transaction is the one that carries context, and it's worth doing even when the doc is sitting in Unassigned — file it first, then send. Pipeline collects three things: an envelope subject, the signers you check off from the Agents and Contacts sections, and the documents you're sending. Then it hands you into DocuSign.

In DocuSign you do the part only DocuSign can do — confirm or adjust the recipients that carried over, drag each signer's fields onto the pages, and send. Your envelope sits in DocuSign's Drafts until you do, which is where to look if you thought you'd sent something and no one has received it.

> If you send the same form every deal, build the DocuSign template once and give it **the same name as the Pipeline document**. DocuSign then offers the matching template as soon as your envelope arrives, and the fields land where they always land. You can also apply one by hand from Actions → Edit Documents → Apply Templates.

> Fillable PDFs can't be filled inside Pipeline. Download the form, fill it in a PDF editor, upload the filled version back to the transaction, and send that one for signature.

4. File the Executed Copy When It Comes Back

When the last signer finishes, the completed document returns to Pipeline on its own and waits on the Unassigned page. If you sent it from a transaction it arrives already pre-assigned to that transaction; if you sent it from

Unassigned or Reference, it comes back the way anything else arrives and needs a home.

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

> Several documents sent in one envelope come back as one combined PDF rather than as separate files. If your office files them individually, either send them as separate envelopes or break the returned document apart after it lands.

5. Pull In Anything That Was Signed Outside Pipeline

Not everything starts in Pipeline. When an envelope was sent from DocuSign directly — by the other side's agent, by your broker, by you before you connected — you don't have to download it and upload it again. **Import from DocuSign** on the Unassigned page reads your DocuSign Inbox and brings the documents you pick straight in.

This is also the fix for the 5MB link problem. Anything too big to arrive by email arrives fine this way, because it isn't traveling as an attachment.

Unassigned is the holding queue every emailed doc passes through on its way to a transaction — open it to see what arrived, who added it, and what it came in with.

See Unassigned Docs List

6. Send a Blank Form Out of Your Reference Library

Some signatures have no transaction yet — a buyer broker agreement before you have an address, an independent contractor agreement for a new agent, an office policy acknowledgement. Those live in your Reference library, and you can send them for signature straight from there. The executed copy returns to Unassigned like everything else, ready to file wherever it belongs.

Your company's Reference page is the shared library — the blank forms, disclosures, training material, and links an admin posts once so nobody on the team has to hunt for them.

See Reference Library & Forms