Adopt Pipeline eSign Alongside Your Current E-Sign Tool

Last Modified on 09/04/2026 11:18 am EDT

You don't have to break an agreement or move your whole form library to start. Pipeline eSign is priced by the send, so it can run beside the tool you already have until you're ready to decide.

Introduction

Most offices meet Pipeline eSign in the middle of a commitment to something else — a multi-year signing agreement with time left on it, a library of forms someone spent months building, and agents who are fluent in the tool they already open every day. All three feel like reasons to wait.

None of them has to be. Pipeline eSign has no subscription, no per-user fee, and no monthly minimum: you're billed for the signature requests your team actually sends, in blocks of ten, and in a month where nobody sends anything you're charged nothing. That means adding it costs you nothing you aren't using, and there's nothing to cancel first.

So the move isn't a switch, it's an overlap. You start with one document, put real deals through it, and let the evidence accumulate while your existing tool keeps carrying everything else. When your current agreement comes up for renewal, you're deciding with your own numbers instead of a guess.

When to Use This

- You're locked into a multi-year signing agreement and can't get out of it yet.
- You have hundreds of forms built somewhere else and rebuilding them all at once isn't realistic.
- Your agents are comfortable with the tool they already use and won't move on a memo.
- You want to try Pipeline eSign on live deals without giving up the tool your office depends on.
- Your renewal is coming and you want real evidence before you sign for another term.

Why This Beats Waiting for Your Contract to End

The instinct is to treat this as an either/or — cancel one, adopt the other — and since you can't cancel yet, to put the whole question off until the agreement runs out. That framing is what costs you the year. It assumes Pipeline eSign has an ongoing fee you'd be paying twice, and it doesn't.

Waiting also postpones the only work that actually takes time. Rebuilding a form library is the real cost of moving, and it doesn't get shorter for having been deferred — an office that starts the day the renewal notice arrives is doing the whole thing under a deadline. Starting now, one document at a time, means the library gets built in the ordinary course of business, and when the renewal does land you're not deciding between a tool you know and a tool you've read about.

1. Set a Limit Sized for a Small Start

Your only spend control is the monthly limit, and while you're running in parallel it should be a small number. It's a ceiling, not a purchase — nothing is bought up front, unused blocks are never billed, and you can raise it the moment a month gets busier than you planned.

Set the most your office can spend on signature requests in a month, then pay only for the blocks your team actually sends.

See eSign Monthly Limit

> A request counts per send, not per page, document, or signature — so a package of three documents going to four signers is one request. Requests are billed in blocks of ten at a per-request price set by your Transaction Plan; your account's exact rate is on your Pipeline eSign page.

2. Choose the One Document You Send Most

Don't start with the library. Start with the single document your office sends more than any other — the listing agreement, the buyer representation agreement, the office's own disclosure. One document is enough to test the whole loop, and it's the one where a reusable form pays for itself fastest.

Pick it by frequency, not by importance. The form your admins retype twice a week teaches you more in a month than the one you send at closing.

3. Put That Document on Your Reference Page

An eSign form is built from a PDF that already lives on your company's Reference page, so that's where the document goes first. It's shared shelf space rather than a personal upload — post it once and everyone who needs it can find it.

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

4. Build It Into a Reusable eSign Form

This is the step that carries the real cost of moving, and it's why the honest advice is to adopt gradually rather than migrate. Naming the signers, placing the fields, and mapping the transaction details is genuine work — bearable for one document, a project for hundreds.

Turn a PDF from your Reference page into a reusable form with the signers named, the fields placed, and transaction details already filled in — so the doc your office sends most goes out the same way every time.

See eSign Forms

> Build one, use it for a few weeks, then build the next. An office that adds a form a month has its ten busiest documents covered inside a year, without ever stopping to do a migration.

5. Route Live Deals Through It, Not Test Ones

Send the real thing. A test send tells you the buttons work; a live deal tells you whether your signers open it without calling the office, and that's the number your renewal decision rests on. Everything not covered by your new form keeps going out the way it always has.

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

> Agents entrenched in a tool they already know are the real variable here, not the software. An office that hands its agents one document and leaves the rest alone gets adoption; one that announces a platform change usually gets a deferral.

6. Decide at Renewal, Using Your Own Numbers

By the time your existing agreement comes up you'll have a year of evidence sitting on your Pipeline eSign page: how many requests your team actually sent, what they cost, and which documents they went out on. Set that against the renewal quote in front of you.

Either answer is fine, and neither one strands you. If the parallel run says yes, you already have your busiest forms built and your agents already know the flow. If it says no, offices turn eSign back off after a stretch of real deals as a matter of course — and with no monthly minimum, a quiet month afterward costs nothing.