Pipeline eSign Activation

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Turning Pipeline eSign on is a master admin's job, and it takes about a minute from inside your account. The moment you do, signature requests open up for everyone on your team.

Introduction

Your deals already live in Pipeline and the signatures happen somewhere else. Someone downloads the contract, uploads it to a signing tool, chases the signers, then files the executed copy back by hand.

Pipeline eSign closes that gap, and it arrives switched off. Nothing about it shows up in an account until a master admin goes looking — no eSign menu, no send option on a transaction, nothing billed. Activation is the moment that changes, and it changes for the whole company at once.

It's self-serve, so there's no demo to sit through and no ticket to open. The two things worth settling first are who in your office will be sending requests and what you're willing to spend in a month, because both land on everyone the second eSign goes live.

How It Works

Activation lives with your other add-ons in Admin / Settings, and starting, sizing, and stopping all happen on that one page.

Where the Switch Lives

The switch sits on the *Pipeline eSign* page, under **Add-On Modules** in Admin / Settings. That one page is the whole add-on: turning eSign on, setting the most it can charge you in a month, watching what your team sends, and dropping it again if it isn't earning its place.

What Changes the Moment You Activate

Before activation, a master admin can send free trial requests and nobody else in the account sees eSign at all — see Trial Credits. Activate, and it opens to everyone straight away: the **eSign** menu appears at the top of the page, **[Send for Signature]** appears on transactions and on your *Reference* page, and anyone in the account can send. Billing starts on your next bill date, so send your team their instructions before you throw the switch.

One Switch for the Whole Account

Pipeline eSign turns on for the company rather than for a person, a team, or a single office, so the decision belongs to whoever runs the account. An agent who wants it makes the case to their office admin. It's also independent of your Transaction Plan: moving up a plan changes what a request costs, not whether eSign is on.

Activate Pipeline eSign

> Open signature requests to everyone in your account, from inside Admin / Settings.

> **Who Can Do This**: Master admins.

To activate Pipeline eSign:

1. Click the **[Gear]** in the upper-right corner, then **[Admin / Settings]**.
2. Under **Add-On Modules** in the left menu, click **[Pipeline eSign]**.
3. Drag the slider to set the most your office can spend on signature requests in a month.
4. Click **[Activate Pipeline eSign →]**.
5. Review the billing details, then click **[Add Document Signing]**.

eSign is live for everyone in the account from that moment, and billing starts on your next bill date. There's nothing else to set up first — your team can send its first request straight away.

Ask Us to Hide Pipeline eSign in Your Account

> Not taking eSign this year? We can hide it across your account so nobody sees the menus or the prompts.

> **Who Can Do This**: Your company's decision-maker for the account. An enterprise admin can ask on behalf of every account in their enterprise.

To have Pipeline eSign hidden in your account:

1. Email us at **help@paperlesspipeline.com**.
2. Tell us whether you want eSign hidden in this account only, or across every account in your enterprise.
3. We hide it, and eSign stops appearing anywhere in the accounts you named.

Hiding eSign is reversible. Ask us again whenever you want it back, and the activation option reappears on its own.

Decide What You'll Spend Before You Switch It On

The slider on the activation screen is the only spend control eSign has, so it's worth knowing what that number does before you drag it.

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

Keep the Signing Tool You Already Pay For

Activating eSign doesn't ask you to cancel anything, which is the part that matters when there's time left on an agreement somewhere else.

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.

See Adopt Pipeline eSign Alongside Your Current E-Sign Tool

Show Your Team Where a Request Starts

Activation is the last admin step. What your team needs on day one is where to begin a request, because that decides what Pipeline fills in for them and where the signed copy comes back to.

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

Pipeline eSign Activation Troubleshooting

Turned it on and something's still missing? Start here.

- Why Don't I See Pipeline eSign in My Account?