Pipeline eSign Settings

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Pipeline eSign arrives switched off. From one page a master admin turns it on, sets the most it can cost in a month, and watches what the team sends.

Introduction

Pipeline eSign lets your team send documents for signature without leaving Pipeline. It's a paid add-on, billed separately from your Transaction Plan, in blocks of requests and only in the months your team sends them, on the same bill and card you already use.

Everything about paying for it sits on one page. The monthly limit you set there is the most Pipeline can charge in a billing cycle. It buys nothing in advance, and a month with no sends costs nothing. Your rate per request depends on your Transaction Plan and is shown on that page. eSign turns on for the whole account at once rather than for one agent or one office, so it's one decision for your company.

You can see whether it fits before anyone else in the account sees it. A master admin can send two real signature requests free, on documents your office actually signs.

How It Works

Starting, sizing, watching and stopping eSign all happen on the Pipeline eSign page.

Try It Before You Activate

Before anyone activates, a master admin can send two free signature requests. They're real requests, with real documents, real signers and a signed file coming back, and they go out from anywhere eSign normally works: a transaction, your Reference Library, or the eSign menu at the top of the page. Nobody else in the account sees eSign while you try it, and nothing is charged or committed.

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.

What Changes the Moment You Activate

Activate, and eSign 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, on your regular Pipeline bill and the card already on file, so send your team their instructions before you throw the switch.

What a Request Costs

One send is one request, however many documents, signers, or fields it carries. It counts the moment it goes out, whether it's completed, canceled, or declined, and because a sent request can't be edited, correcting one means

sending a second, which counts again. Pipeline bills requests in blocks of ten, rounded up, at a per-request rate set by your Transaction Plan and shown on the page, and never bills for an unused block. There's no contract and no monthly minimum: a month with no sends costs nothing.

The Limit and the Cycle

The monthly limit caps what Pipeline can charge you in a billing cycle and buys nothing up front, so you can set it high for headroom and still pay only for what your team sends. Usage starts at zero each cycle while the limit stays where you set it, so there's nothing to renew. The limit can't be set below what your team has already used this cycle; you can lower it once usage resets on your next billing date. Reach the limit partway through a month and a master admin can raise it on the spot, with the extra requests available straight away.

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.

Change Your Monthly eSign Limit

Adjust the most Pipeline can charge your account for signature requests in a billing cycle.

Who Can Do This: Master admins whose company is subscribed to Pipeline eSign.

To change your monthly eSign limit:

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 the limit you want. To go above 2,000 signature requests a month, type the number instead.
4. Click **[Change Spending Limit]**.
5. Review the updated billing details, then click **[Change Spending Limit]** again to confirm.

The new limit takes effect right away. Your team can send up to it this cycle, and you're billed only for the blocks

they use. Set it to 0 and sending pauses for the whole team until you raise it again. The limit can't go below this cycle's usage, so if your team has already sent requests, you can set it to 0 once usage resets on your next billing date.

Track Your Company's eSign Usage

See how many signature requests your team has sent this billing cycle and what they've cost so far.

Who Can Do This: Master admins whose company is subscribed to Pipeline eSign.

To track your company's eSign usage:

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. Review your team's usage for the current billing period.

Usage updates as your team sends, so what you're looking at is current: requests used, requests remaining, and what's been spent against your limit.

View All Sent Signature Requests

Open the company-wide list of every signature request your team has sent.

Who Can Do This: Master admins whose company is subscribed to Pipeline eSign.

To view all sent signature requests:

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. Click **[View all signature requests →]**.

You'll see every request sent by anyone on your team, each showing the sender, the date it went out, its current status, and where it was sent from.

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.

See Which Plan Sets Your Rate

Two offices sending the same number of requests can be charged differently, and nothing on the eSign page explains why. The answer is the plan the account already sits on.

Pipeline bills on a simple monthly transaction plan — a ladder you move up or down as your deal volume changes.

See Transaction Plans

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

Frequently Asked Questions

Is there a free trial of Pipeline eSign?

Yes — two free signature requests. They're real requests to real signers, not a sandbox, so you can judge eSign on a document your office actually sends.

Who can send the free requests?

Master admins. Sending the trial requests and activating a plan afterward are both master admin actions.

Does trying eSign cost anything?

No. There's no upfront cost and nothing to cancel. Charges only begin once a plan is activated and your team starts sending.

Where can I send the free requests from?

Anywhere eSign normally works. From a transaction, from your Reference Library, or from the eSign menu at the top of the page.

Will my agents see eSign while I'm trying it?

Not yet. During the trial, eSign menu items show for master admins only. Everyone else in the account sees eSign once a paid plan is activated.

Can I get more than two free requests?

No — there's no extended trial. If you want a longer look, activate for a month, use eSign across a few real deals,

then set the limit to 0 once usage resets on your next billing date. You're billed only for the blocks you actually send, so a light month of testing costs very little.