Try Pipeline eSign Before Opening It to the Office

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Two free signature requests are enough to answer the real question — not whether the software works, but whether the round trip fits how your office already runs.

Introduction

Nothing about eSign appears in your account until a master admin goes looking for it. There's no menu, no send option on a transaction, and no charge. That's deliberate, and it's what makes a quiet evaluation possible: while you're testing, your agents don't see eSign menu items at all, so nobody is asking about a tool you haven't decided on yet.

You get two free signature requests to spend, and they behave exactly like paid ones: real documents, real signers, a real executed copy coming back. What those two sends are for is the whole loop: how a request reaches a signer, how you watch it, where the finished document lands, and who in your office should be driving it.

Activation is the moment that changes for everyone. The second you turn eSign on it's available to every user in the account, so the decisions worth making are the ones you make before that.

When to Use This

- You want to see what Pipeline eSign actually does before committing your office to it.
- You're weighing it against the signing tool you already pay for and want a real send, not a demo.
- Your agents have started asking about eSign and you'd rather have an answer than a guess.
- You want to know what it will cost your office before you turn anything on.
- You'd like to test it quietly, without your team seeing menu items you're not ready to explain.

Why This Beats Holding Out for a Longer Trial

The instinct, once the two requests are gone, is to ask us for more of them — a thirty-day trial, an extended evaluation, something shaped like the trial every other tool offers. There isn't one, and the reason is that eSign isn't priced like those tools. There's no subscription and no monthly minimum, so a month where your office sends nothing costs nothing at all.

That changes what a trial even means here. Offices that want real room to evaluate don't wait for a longer one — they activate, use eSign properly across a few live deals for a month, and turn it back off if it didn't earn its place. Because you're billed only for the blocks your team actually sends, a light month of honest testing costs very little, and it answers what two requests never could: whether your people will use it.

1. Spend Your Two Free Requests on Real Paperwork

The two free requests belong to you as master admin, and they're spent by sending. Use them on documents that genuinely need signing rather than on a test file — a real send puts a real signer on the other end, and that's the half you can't simulate.

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

> A request is counted per send, not per page, document, or signature — so bundling three documents and four signers into one request still spends one credit. Canceled and declined requests count too, and a sent request can't be edited, so correcting one means sending a new one.

> No sign of eSign anywhere in your account? See Why Don't I See Pipeline eSign in My Account?

2. Watch the Whole Round Trip, Not Just the Send

Sending is the easy half. What tells you whether eSign fits your office is what happens after — whether signers open it without calling you, how quickly you can see who's holding things up, and how a stalled request gets moved along.

Every request you've sent sits in one list, so you can see who has signed, who is holding things up, and what you can do about it.

See Request Status

Then follow the finished document home. When the last signature lands, the executed document comes back to Pipeline on its own — see Signed Docs Return

3. Decide Who Will Be Doing the Sending

This is the decision worth making while eSign is still invisible to everyone else, because it shapes how the whole office will experience it. Some brokerages want agents sending their own requests from their own transactions. Others keep signature collection centralized with the admins or transaction coordinators who already handle the paperwork.

Visibility follows the answer. Anyone who sends sees the requests they sent; admins can search and manage requests from users across the company, within what they already have permission to see. So an office where agents send ends up with each agent watching their own queue and an admin watching all of them, while a centralized office ends up with one list that already holds everything.

Settle it now, and what you send your team on activation day is a workflow, not a new button.

4. Set a Monthly Limit and Activate

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

Activation is account-wide and immediate. The moment you turn eSign on, every user in the account can send, and billing starts on your next bill date — so send your team's instructions before you flip it, not after.

5. Give It a Real Month Before You Judge It

Two requests answer whether eSign works. A month answers whether your office uses it, which is the question that actually decides this. Put live deals through it, let your agents reach it in their own transactions, and see what comes back in the way of questions.

Give yourself one advantage going in: build the document your office sends most often into a reusable form before the month starts, so the second send is faster than the first and your team is judging the tool rather than the setup.

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

If the month says no, you're not stuck with it. Offices routinely turn eSign on for a stretch of real deals and turn it back off afterward — and with no monthly minimum, a quiet month after that costs nothing.