Request Status

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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.

Introduction

Sending is the easy part. What follows is the part that eats a Tuesday: working out whether the second seller ever opened the thing, and whether it's time to nudge somebody or leave them alone another day.

Every request you send lands in one list on the eSign page with its current state beside it, and that list is where the follow-up happens. Requests move through a small set of states and stay in the list however they ended, so one that was declined or called off is as visible as one that finished. On a request with more than one signer, the state you see is a summary of the whole thing, with a per-signer view underneath it for when the summary isn't enough.

The list answers who's actually holding things up, which is what you need before deciding to do anything at all. From there you can nudge the person you're waiting on, call off a request that's gone stale, or pull a PDF copy for your file. Nothing chases on your behalf, so the list is where the chasing starts.

How It Works

One list, one status per request, and a gear menu with everything you can do to it.

Where Your Requests Live

Click [eSign] from the top menu and you land on the requests you've sent. Each row shows the date it went out, where it was sent from, and its current status.

Know What Each Status Means

A request is **Incomplete** while signatures are still outstanding, **Completed** once everyone has signed, **Declined** if a signer refuses, and **Canceled** if you called it off.

See Who's Signed and Who Hasn't

The **Status** column gives you the request as a whole. On a request with several signers, click the status to open the breakdown and see exactly who has signed and who hasn't.

Who Sees What

You see the requests you sent. Admins can search and manage requests from users across the company, within what they already have permission to see.

Archive What You're Done With

Archiving takes a request off your main list without deleting it. Pipeline hides archived requests by default, and the **Show Archived** filter in search brings them back.

Every Request Counts, However It Ends

A request counts against your monthly limit once it's sent — completed, canceled, or declined all count the same. Canceling and re-sending a corrected version means two.

View Your Sent Signature Requests

> See everything you've sent and where each one stands.

> **Who Can Do This**: Anyone whose company is subscribed to Pipeline eSign can view their own sent requests. Admins can also view requests from across the company, within what they have permission to see.

To view your sent signature requests:

1. Click [eSign] from the top menu.

You'll see the list of requests you've sent, each with the date it went out, its current status, and where it was sent from.

Check Which Signers Have Signed

> Open the per-signer breakdown to see who's done and who you're waiting on.

> **Who Can Do This**: Anyone whose company is subscribed to Pipeline eSign can track their own sent requests. Admins can also track requests from across the company, within what they have permission to see.

To check which signers have signed:

1. View your sent signature requests.
2. Find the request you want to track and read its overall state in the **Status** column.
3. Click the status to see each individual signer's status.

That tells you who to chase — and if you've set a signing order, who the request is currently sitting with.

Send a Reminder to the Next Signer

> Nudge whoever the request is waiting on, without writing an email yourself.

> **Who Can Do This**: Anyone whose company is subscribed to Pipeline eSign.

To send a reminder to the next signer:

1. View your sent signature requests.
2. Find the request you want to send a reminder for.
3. Click the gear next to it, then select [Send Reminders].
4. Click [Send Reminders] to confirm.

Pipeline emails a reminder to the next signer in line.

Cancel a Signature Request

> Stop a request that shouldn't go through — the wrong document, the wrong signer, a deal that changed.

> **Who Can Do This**: Anyone whose company is subscribed to Pipeline eSign.

To cancel a signature request:

1. View your sent signature requests.
2. Find the request you want to cancel.
3. Click the gear next to it, then select [Cancel Request].
4. Click [Cancel Signing Request] to confirm.

Signing stops and nothing further happens on the request. Because a sent request can't be edited, canceling and building a fresh one is how you correct it — and both count against your monthly limit.

Archive a Signature Request

> Clear a finished or dead request off your main list without losing it.

> **Who Can Do This**: Anyone whose company is subscribed to Pipeline eSign can archive their own sent requests. Admins can also archive requests from across the company, within what they have permission to see.

To archive a signature request:

1. View your sent signature requests.
2. Find the request you want to remove from the list.
3. Click the gear next to it, then select [Archive].

The request drops out of your main view. Turn on **Show Archived** in search when you need to see it again.

Search Your Sent Signature Requests

> Find one request in a long list by document, signer, status, or where it started.

> **Who Can Do This**: Anyone whose company is subscribed to Pipeline eSign can search their own sent requests. Admins can also search requests from across the company, within what they have permission to see.

To search your sent signature requests:

1. View your sent signature requests.
2. Type a **Document Name**, **Signer Name**, or **Signer Email Address** into the search box for a quick search.
3. For more filters, click [Search] to open the advanced options (outlined below).
4. Click [Search] to see your results.

Company-wide Signature Requests

Admins only. Includes requests from users across the company, limited to what you have permission to view.

Show Archived

Brings archived requests back into the results. They're hidden by default.

Status

Narrows to **Incomplete**, **Completed**, **Declined**, or **Canceled**.

Date Sent

Filters by when the request originally went out for signature.

Initiated From

Filters by where the request started — a **Transaction**, **Reference Docs**, or **Standalone**.

Download a PDF Copy of a Request

> Pull a PDF of a document you sent for signature, to store or share offline.

> **Who Can Do This**: Anyone whose company is subscribed to Pipeline eSign.

To download a PDF copy of a request:

1. View your sent signature requests.
2. Find the request containing the doc you want.
3. Click the gear next to it, then select [Download PDF].

The PDF downloads to your device.

Request Status FAQ

Every sent request carries a status, a per-signer breakdown, and a gear menu of things you can do to it. Answers to the common questions about tracking, reminding, canceling, and archiving.

See Request Status FAQ