eSign Requests

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Every request you've sent sits in one list, so you can see who has signed and who is holding things up. When the last signature lands, the signed document comes back to Pipeline on its own.

Introduction

Once a request is out, the waiting starts. Two sellers got the link yesterday, one has signed, and the closing date isn't moving. What you need to know is who still owes a signature and whether it's time to nudge them.

Every request you send sits in one list on the *eSign* page with its status beside it. Click the status to see each signer, so a request waiting on one person out of three tells you which one. From the same list you can send a reminder, call off a request, or download a copy. Pipeline doesn't send reminders on its own, and it can't tell you whether someone opened the email, so the follow-up starts with you and this list.

When the last signature lands, the signed document comes back to Pipeline by itself, with a certificate and a signing log added at the end. There's nothing to download and upload again.

How It Works

One list, one status per request, a gear menu with everything you can do to it, and a signed document that comes back on its own.

Statuses, and Who You're Waiting On

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. On a request with several signers, click its status to see exactly who has signed and who hasn't. Every request counts against your monthly limit once it's sent, however it ends, so canceling and re-sending a corrected version counts twice.

Where the Signed Document Goes

When the last signature lands, the signed document comes back into Pipeline by itself. Where it lands depends on where the request started. From a transaction, it returns to *Unassigned* already pre-assigned to that transaction, ready for you to assign with the right name and permission category. From *Reference* or the *eSign* page, it stays with your sent requests until you copy it to *Unassigned* yourself.

What Comes Back

One request returns as one signed file. Its docs sit in the order you sent them, so break it apart afterwards if you want them filed separately. Pipeline appends a **Certification of Authenticity** and an **Event Log** recording the signing events, and emails a final copy to you and to every recipient on the request.

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.

Copy a Signed Doc to Unassigned

Move a completed signed document out of your requests list and into *Unassigned*, where you can put it on a transaction.

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

To copy a signed doc to Unassigned:

1. Click [eSign] from the top menu to view your sent requests.
2. Find the completed request.
3. Click the gear next to it, then select [Copy to Unassigned].

The signed document appears in *Unassigned*, ready to assign. Requests that started from a transaction are already there — you only need this for the ones sent from Reference or the eSign page.

What to Do With the Doc Once It's Back

From here the signed document is an ordinary Pipeline document, and the rest of what you'd do with it is

documented where documents live.

Unassigned Docs List

Unassigned is the holding queue every emailed doc passes through on its way to a transaction — open it to see what arrived, who added it, and what it came in with.

See Unassigned Docs List

Doc Assignment

A doc has landed in Unassigned and now it needs a home. Assigning is the step that puts it on the right transaction, with the right name and the right permission category.

See Doc Assignment

Doc Break Apart

One scanned stack, many documents. Break a doc apart to split it into separate docs, pull out the pages you need, and name each one as you go.

See Doc Break Apart

Frequently Asked Questions

Where do I see everything I've sent for signature?

Click [eSign] from the top menu. You land on your sent requests, each showing the date it went out, its status, and where it was sent from.

What do the statuses mean?

Incomplete, Completed, Declined, or Canceled. Incomplete means signatures are still outstanding, **Completed** means everyone has signed, **Declined** means a signer refused, and **Canceled** means you called it off.

How do I tell which signer is holding things up?

Click the status on that request. The **Status** column gives you the request as a whole; clicking it opens the per-signer breakdown, so you can see exactly who hasn't signed.

Can I nudge a signer who hasn't signed?

Yes — gear icon, then [Send Reminders]. Pipeline emails a reminder to the next signer in line. Reminders go out when you send them, so a slow signer is a two-click fix rather than a note to yourself.

Can I tell whether a signer has opened the document?

No — there's no read receipt. What you get is signing status: who has signed and who hasn't. If nobody has moved, send a reminder rather than guess.

If I cancel a request, does it still count against my limit?

Yes. Every request counts once it's been sent, whether it ends up completed, canceled, or declined. Canceling to fix a mistake and re-sending means two requests.