Signers FAQ

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Signers reach the document through a secure emailed link and see only the fields you assigned them. Answers to the common questions about adding signers, ordering them, and what they experience.

Do my signers need a Paperless Pipeline account?

Signers sign from an emailed link. Each one gets a secure link that opens the document with their fields ready to fill, on any device — no app, no install.

How does my signer actually sign?

They open the email, click the link, and either click [Sign Now] or click the fields directly. [Sign Now] walks them through every required field in order; the red-highlighted fields let them work down the document at their own pace.

Can two people sign at the same time?

Yes — leave the signing order off. Without [Set Signing Order] checked, every signer gets the request at once. What isn't possible yet is putting two signers at the same numbered position within an order; if that's what you need, tell us and your feedback shapes what we build next.

Can I reorder my signers?

Yes — check [Set Signing Order] and drag them into place. If dragging isn't responding, a browser extension is the usual culprit; try again with extensions disabled, or in a different browser.

I typed a signer's email wrong. Do I have to rebuild the request?

Not if you haven't sent it yet. Finish setting up the document, click [Send], and correct the address in the *Signers* window before you click [Send Now]. Once a request has gone out, addresses are fixed — you'd cancel it and send a new one.

Can I copy someone who doesn't need to sign?

Yes — use the **CC** field on the send screen. Enter their email address and they get the signed document without being asked for a signature.

Can Pipeline fill in my signers' email addresses and phone numbers for them?

Not today. **Transaction Info** fields autofill deal details like names and dates from the transaction, and **Full Name** pulls a signer's name — but signers still enter their own contact details.

Why does my contact's role show up as part of their name on the signature?

The signer's Contact Role travels with them, and there's no way to turn it off. If your role names carry a prefix — *7-Buyer*, *5-Seller* — that prefix rides along too. Renaming the role is the only lever today, and we've logged the ask.

Can I see requests other people in my office sent?

Admins can; agents see their own. Admins can view and manage signature requests from users across the company, limited to what they already have permission to see. An agent doesn't get visibility into a request someone else started.

Do I have to resize every initials field by hand?

Yes, for now. Each initials field is placed at its default size and sized individually, which adds up on a document with a lot of them. Having new fields inherit the last size you used is on our list, and it came from customers telling us — so keep it coming.

Learn More

Signers are the people a request goes out to. Choose who signs, set the order they sign in, and copy anyone who just needs to see it.

See [Signers]

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.