

Signers

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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.

Introduction

A signature request is only as good as the list of names on it. A wrong address on the third signer doesn't fail loudly. It sits there not being signed, while you assume everything is in motion.

Signers are whoever needs to put their name on the document, and that's a wider group than the people in your account. An attorney, a client, an out-of-office broker, somebody who has never heard of Paperless Pipeline: they all sign the same way, through a secure link that opens on whatever they happen to be holding. There's nothing to install and no account to create, which is usually what decides whether a signature comes back today or next week.

You also set the shape of the signing before any of it goes out. Whether people sign in a set order or all at once, and who receives the finished document without being asked to sign it, are both yours to decide per request. Each person only ever sees the fields you gave them, so a request carrying four signers doesn't turn into four people scrolling past each other's boxes.

How It Works

You set the signers, their fields, their order, and who gets copied, all before you send.

Who Can Be a Signer

Anyone. From a transaction, check the boxes next to the people you need in the *Agents* or *Contacts* area. From anywhere else, add signers as **First Party**, **Second Party**, and so on, and enter an email address for each. A request can carry any number of signers.

Each Signer Gets Their Own Fields

You place fields one signer at a time. Select a signer from the **Signers** dropdown, drop their **Signature**, **Initials**, and **Signing Date** fields where they belong, then switch to the next. A signer only ever sees what you assigned to them.

Decide Who Signs First

By default, signers can go in any order. Check [Set Signing Order] on the send screen and drag them into sequence when one signature has to come before another.

Copy Someone Who Doesn't Sign

The **CC** field takes email addresses for anyone who should receive the signed document without being asked to sign it.

What a Signer Actually Sees

Signers get an email with a secure link that works on any device. On the signing page they can click [Sign Now] and

Pipeline walks them through each required field in turn, or scroll the document and click the red-highlighted fields at their own pace.

What Signers Can See of Each Other

You see the requests you sent. Admins can view and manage requests from users across the company, within what they already have permission to see. An agent doesn't get visibility into a request someone else started.

Add Signers to a Signature Request

Choose who needs to sign before you start placing fields — you place fields one signer at a time.

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

To add signers to a signature request:

1. Start the signature request.
2. If you started from a transaction, check the boxes next to the people who need to sign in the *Agents* or *Contacts* area.
3. Otherwise, use the **Signers** dropdown to add signers one at a time as you place their fields.

Each signer you add becomes selectable in the **Signers** dropdown, so you can place their fields separately from everyone else's.

Enter a Signer's Email Address

You enter email addresses on the send screen, not while you're placing fields.

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

To enter a signer's email address:

1. With the request ready, click [Send] in the upper-right corner.
2. Enter the email address for each signer under **Add Signers Email**, in order — **First Party**, **Second Party**,

and so on.

3. Click [Send Request].

Each address gets its own secure link, so two signers never share one.

Set a Signing Order

Make signers go in sequence when one signature has to land before the next.

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

To set a signing order:

1. With the request ready, click [Send] in the upper-right corner.
2. Check [Set Signing Order].
3. Drag the signers into the sequence you want.
4. Click [Send Request].

Pipeline emails the first signer, then the next one once the signature ahead of them is in. Leave the box unchecked and everyone gets the request at the same time.

CC Someone Who Doesn't Need to Sign

Send the finished document to someone who has no fields to fill in — a coordinator, a lender, the other agent.

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

To CC someone who doesn't need to sign:

1. With the request ready, click [Send] in the upper-right corner.
2. Enter their email address (or addresses) in the **CC** field.

3. Click [Send Request].

They get a copy of the signed doc, with nothing to fill in.

Change a Signer's Email Address Before Sending

Caught a typo in an address? Fix it on the send screen instead of rebuilding the request.

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

To change a signer's email address before sending:

1. Finish setting up the document — you can't edit the address while you're placing fields.
2. Click [Send] in the upper-right corner.
3. Update the address in the *Signers* window.
4. Click [Send Now].

Nothing you built is lost. Once the request has gone out, though, addresses are set — you'd cancel and start a new request.

Get a Missing Signer Onto the List

Starting from a transaction, the checkboxes come from the people already on it. A client who isn't in that list isn't missing from eSign — they're missing from the deal.

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See [Adding a Contact](#)

Signers FAQ

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.

See [Signers FAQ](#)

