eSign Drafts FAQ

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A draft holds a signature request exactly as you built it: the documents, the signers, and every field you placed, waiting until you're ready to send. Answers to the common questions about saving, finding, and finishing one.

Where do I find a request I saved but didn't send?

Click [eSign] from the top menu, then [Drafts] from the left menu. Everything you've started and not sent is there, newest activity first.

Can I fill out a document and save it before sending it for signature?

Yes. Click [Save as Draft] in the upper-right corner at any point while you're editing — after uploading, midway through placing fields, or right before you send. The whole request is held as you left it.

Does saving a draft count against my monthly eSign limit?

A request is counted when you send it. Saving a draft doesn't send anything — no signer is emailed and nothing goes out until you click [Send Request].

Will my admin be told when I save a draft for them to review?

No — there's no notification when a draft is saved. Admins can find drafts by searching company-wide from the *Drafts* list, but nothing alerts them. If a broker needs to look at something before it goes out, tell them it's waiting.

Can other people in my office see my drafts?

Admins can search them; other agents can't. Your *Drafts* list shows your own work. Admins can turn on **Company-wide Drafts** in search to include drafts from users across the company, limited to what they already have permission to see.

What happens to the draft after I send it?

It leaves *Drafts* and joins your sent requests. From there you track signer status, send reminders, or cancel it like any other request.

Learn More

Not ready to send? Save the request as a draft and pick it back up when the details, the approval, or the timing finally lands.

See eSign Drafts

Still Have Questions?

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