eSign Drafts

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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.

Introduction

You've picked the documents, added the signers, and placed forty fields. Then the number you were waiting on doesn't arrive, or your broker wants a look first, and the whole thing has to sit until tomorrow.

A draft is the pause button for that. It holds the entire request as you built it: the documents, the signers you chose, and every field you placed, exactly where you left them. Nothing has gone anywhere in the meantime. Pipeline hasn't emailed anyone, no signer knows the request exists, and nothing counts against what your office spends. A request counts when you send it, not when you save it.

Waiting on one missing number doesn't cost you the work you already did. Drafts sit in their own list, apart from what you've already sent, so there's no mistaking one for the other. Open a draft and you're back in the same editor you left, free to change anything before it goes.

How It Works

Drafts are a pause button on a request you've already started building.

Save at Any Point

While you're editing a request, [Save as Draft] sits in the upper-right corner. Click it whenever — after uploading the docs, halfway through placing fields, right before sending.

Where Drafts Live

Click [eSign] from the top menu, then [Drafts] from the left menu. Each row shows the doc name being sent, when it was last updated, and where it was saved from.

What Drafts Are Not

A draft hasn't gone anywhere. Pipeline hasn't emailed anyone, no signer knows the request exists, and nothing counts — Pipeline counts a request when you send it, not when you save it.

Who Can See Yours

Your drafts are yours. Admins can search across drafts saved by users throughout the company, within whatever they already have permission to see.

Finish a Draft

Opening a draft puts you back in the same editor you left. Change what you need to, then either save it again or send it — sending a draft works exactly like sending a fresh request.

Save a Signature Request as a Draft

Park a request you've started so you can finish it later without rebuilding it.

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

To save a signature request as a draft:

1. Start a signature request and add whatever you have so far.
2. Click [Save as Draft] in the upper-right corner while you're editing.

The request moves to your *Drafts* list with everything you'd added still in place.

Open Your Saved Drafts

See everything you've started but haven't sent, in one list.

Who Can Do This: Anyone whose company is subscribed to Pipeline eSign can open their own saved drafts.

To open your saved drafts:

1. Click [eSign] from the top menu.
2. Select [Drafts] from the left menu.

You'll see each draft with the doc name being sent, the date it was last updated, and where it was saved from.

Edit a Saved Draft

Pick a draft back up and change whatever needs changing.

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

To edit a saved draft:

1. Open your saved drafts.
2. Find the draft you want, then click [Edit or send draft] to the left of it.
3. Make your changes.
4. Click [Save as Draft] to pause again.

The draft keeps its place in the list, with its *last updated* date reset to now.

Send a Saved Draft

> Finish a draft and put it in front of your signers.

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

To send a saved draft:

1. Open your saved drafts.
2. Find the draft you want, then click [Edit or send draft] to the left of it.
3. Make any last changes, then click [Send] in the upper-right corner.
4. Add each signer's email address, set the signing order or a message if you need them, and click [Send Request].

Signers get an email with a secure link to review and sign from any device, and the request moves out of *Drafts* and into your sent requests.

Delete a Saved Draft

> Clear out a draft you're not going to send.

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

To delete a saved draft:

1. Open your saved drafts.
2. Find the draft you want to remove, then click [Delete draft] to the left of it.
3. Click [Delete] again to confirm.

The draft comes off your list. Nothing was ever sent, so there's nobody to tell.

Search Your Saved Drafts

> Find a specific draft by what's in it rather than scrolling for it.

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

To search your saved drafts:

1. Open your saved drafts.
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 —**Company-wide Drafts** for admins, and **Date Updated** to narrow by when a draft was last touched.
4. Click [Search] to see your results.

Results show the same columns as the full list, so you can go straight from a match to editing or sending it.

eSign Drafts FAQ

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.

See [Signature Request Drafts FAQ]