eSign Drafts

Last Modified on 11/10/2026 12:29 pm EST

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 added the documents, chosen the signers, and placed every field. Then the sale price you were waiting on hasn't come through, or your broker wants to read the addendum before it goes out, and the request has to wait until tomorrow.

Save it as a draft and nothing you built is lost. The draft keeps the documents, the signers, and every field exactly where you put them, in its own Drafts list on the *eSign* page, apart from what you've already sent. Until you send it, nobody gets an email and nothing counts toward your office's eSign limit. Open it again and you're back in the same editor, free to change anything.

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 [Saved 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 [Saved 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.

Frequently Asked Questions

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

Click [eSign] from the top menu, then [Saved 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.