Turning On Pipeline eSign

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Turn Pipeline eSign on from one page under Add-On Modules, which also caps what it can cost and shows what the team has sent. It stays off until a master admin decides otherwise.

Introduction

Pipeline eSign arrives switched off. Nothing about it reaches your bill or your agents' screens until a master admin turns it on, and it turns on for the whole account at once.

Its page does the whole job: the switch, the monthly limit, and the usage. Once it's on, one more thing is worth setting up: the forms your office sends most.

1. Turn On Pipeline eSign

A master admin can send two free requests first, with nobody else seeing eSign. Activate, and the eSign menu and Send for Signature appear for everyone, billed by the send from your next bill date.

Pipeline eSign arrives switched off. From one page a master admin turns it on, sets the most it can cost in a month, and watches what the team sends.

See Pipeline eSign Activation

2. Prepare the Forms Your Office Sends Most

A PDF from your Reference page becomes a form with the signers named, the fields placed, and transaction details filled in, so the doc your office sends most goes out the same way every time.

Turn a PDF from your Reference page into a reusable form with the signers named, the fields placed, and transaction details already filled in — so the doc your office sends most goes out the same way every time.

See eSign Forms