eSign

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The eSign menu at the top of the page, once a master admin has turned Pipeline eSign on: your forms, your drafts, and every request you have sent and where each one stands.

Introduction

The menu appears the moment eSign is activated for the account. Before that, a master admin can send two free requests to try it while nobody else sees the menu at all.

Setting up comes first, then sending. A form prepared once goes out the same way every time, and every request you send sits in one list so you can see who has signed and who is holding things up.

Setting It Up

Prepare the Forms Your Office Sends Most

A PDF from your Reference page becomes a form with the signers named and the fields placed, 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

The Switch, the Limit, and the Usage

One page under Add-On Modules turns eSign on, caps what it can cost in a month, and shows what the team has sent.

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 Settings

Sending

Send a Document for Signature

Start from a transaction, from your Reference Library, or from a file on your computer. The signed copy comes back onto the deal.

Send a document out for signature without leaving Pipeline — start from a transaction, from your Reference Library, or from a file on your computer.

See Sending eSign Requests

Save One to Finish Later

Save the request as a draft and pick it back up when the details, the approval, or the timing lands.

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

Every Request and Where It Stands

One list of everything you have sent, who has signed, and who is holding things up. When the last signature lands the signed document comes back on its own.

Every request you've sent sits in one list, so you can see who has signed and who is holding things up. When the last signature lands, the signed document comes back to Pipeline on its own.

See eSign Requests