Sending eSign Requests

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

Introduction

An addendum is ready and the seller needs to sign it tonight. Done outside Pipeline, that's a download, an upload to a separate signing tool, a wait, and then fetching the signed copy and putting it on the deal yourself.

A signature request keeps all of it inside Pipeline: the documents, the people signing, and the fields each one fills, sent together. Where you start it matters most. Start on a transaction and Pipeline fills in the deal's details, and the signed copy comes back to *Unassigned* already pointed at that deal, ready for you to file. Start from your *Reference* page or a file on your computer when there's no transaction yet, like a buyer broker agreement signed before a house is found. That signed copy waits with your sent requests until you move it.

Signers don't need a Pipeline account, just the emailed link, on any device.

How It Works

A signature request is one package — the docs, the signers, and the fields — sent in one go.

Pick Where You Start

From a transaction pulls the deal's details in with it, so Pipeline fills in details like the transaction name or property address, contacts, and dates for you. **From the Reference Library** sends your office's standard forms — pre-listing paperwork, disclosures — before a transaction exists. **From the eSign page** sends a document you upload from your computer, tracked entirely outside the transaction workflow.

Who Signs, and How

Anyone can sign. That includes an agent or contact on the deal, a client, an attorney, or somebody who has never used Pipeline. From a transaction, you check the people you need in the *Agents* or *Contacts* area; from anywhere else, you add signers as **First Party**, **Second Party**, and so on. Each signer gets an email with a secure link that works on any device, and can click [Sign Now] to be walked through each required field or click the red-highlighted fields at their own pace.

One Package, One Request

A request can hold any number of docs, signers, and fields, and sending it counts as one request however much is inside. That count is what your monthly eSign spending limit measures — see Pipeline eSign Settings for what a request costs. Docs go into the request in the order you select them, so pick them in the sequence you want the signer to work through.

Fields, Signer by Signer

You place fields one signer at a time: pick a signer from the **Signers** dropdown, drop their **Signature**, **Initials**, and

Signing Date fields, then switch to the next. Some fields you fill, some Pipeline fills from the transaction, and each signer sees only the fields assigned to them. A Reference doc with a form already built on it shows a form icon in the **i** column, and its fields come with it — see *eSign Forms*.

Send a Signature Request From a Transaction

Start from the transaction when the document belongs to an active deal — the deal's details come along with it, and the signed doc comes back pre-assigned to that transaction.

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

To send a signature request from a transaction:

1. Go to the transaction, then click [Send for Signature] in the blue action bar. (You can also click [eSign] from the top menu, select [Start New Request], then click [Send] next to the transaction you want.)
2. Check the boxes next to the people who need to sign, from the*Agents* or *Contacts* area.
3. Check the boxes next to the docs you want signed — transaction documents, Reference Docs, or both — selecting them in the order you want them to appear.
4. Click [Continue].
5. Place the fields each signer needs, then place any information you're filling in yourself.
6. Click [Send] in the upper-right corner, add the signers' email addresses, and click [Send Request].

Each signer gets an email with a secure link they can sign from any device. Not ready yet? Click [Save as Draft] at any point while you're editing and come back to it later.

Send a Signature Request From the Reference Library

Send one of your office's standard forms for signature when there's no transaction to attach it to yet.

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

To send a signature request from the Reference Library:

1. Click [Reference] from the top menu.
2. Click [Send for Signature] at the top of the page.
3. Check the boxes next to the docs you want signed.
4. Click [Continue] to start preparing the request.
5. Place the fields each signer needs on the document.
6. Click [Send] in the upper-right corner, add the signers' email addresses, and click [Send Request].

Because the request didn't start from a transaction, the signed document comes back to your sent requests rather than to *Unassigned*. You decide when — and whether — it goes onto a transaction.

Send a Standalone Signature Request

Send a document straight off your computer, tracked entirely outside the transaction workflow.

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

To send a standalone signature request:

1. Click [eSign] from the top menu.
2. Click [Start New Request] from the left menu, then choose [Select Docs On My Computer].
3. Click to upload, or drag and drop the files you want in the request.
4. Place the fields for the first party (outlined below).
5. Use the **Signers** dropdown to add each additional signer in turn, placing only the fields that apply to the signer you've selected.
6. Click [Send] in the upper-right corner, add each signer's email address, and click [Send Request].

Signers receive an email with a secure link to review and sign from any device. Transaction Info fields don't autofill on a standalone request — there's no transaction to pull from — so start from a transaction instead when you want those filled in for you.

Place Fields on the Document

Drag fields onto the doc to decide what shows on it and what each signer has to enter.

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

To place fields on a document:

1. With the request open, select the signer you're placing fields for from the **Signers** dropdown.
2. Drag the fields you need from the *Fields* section on the right onto the doc (the four families are outlined below).
3. Repeat for each signer, placing only the fields that apply to the one you've selected.

Transaction Info

Deal-specific details like **Transaction Name**, **Listing Date**, and **Buyer Name(s)**. These autofill from the transaction, so send from a transaction if you want Pipeline to do the typing.

Document Text

Standard text you're responsible for entering yourself — disclaimers, required language, anything the signer shouldn't have to write.

Signer Fields

The fields the signer completes: **Signature**, **Initials**, and **Signing Date**.

Flexible Fields

Fields either you or the signer can complete, depending on who has the information. Add **Full Name** to pull the signer's details from the transaction. Add a **Text** field for custom information. Add a **Checkbox** where the form needs one. Add a **Select**, **Radio**, or **Checkbox Group** to offer a set of predefined choices — copy and paste your first option to place the rest quickly.

Placing fields is the part that takes the longest on a document you send often. That's what *eSign Forms* is for: build the field layout once and reuse it.

Add a Subject and Message to the Signing Email

Set what your signers see in their inbox before the request goes out.

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

To add a subject and message to the signing email:

1. With the request ready, click [Send] in the upper-right corner.
2. Edit the **Subject** to reflect what's being signed, or leave it as it is.
3. Add a short note or instructions under **Message** to appear in the body of the email.
4. Click [Send Request].

The same screen is where you set the signing order and copy anyone who doesn't need to sign.

Set a Signing Order

Make signers go in sequence when one signature has to land before the next.

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

To set a signing order:

1. With the request ready, click [Send] in the upper-right corner.
2. Check [Set Signing Order].
3. Drag the signers into the sequence you want.
4. Click [Send Request].

Pipeline emails the first signer, then the next one once the signature ahead of them is in. Leave the box unchecked and everyone gets the request at the same time.

CC Someone Who Doesn't Need to Sign

Send the finished document to someone who has no fields to fill in — a coordinator, a lender, the other agent.

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

To CC someone who doesn't need to sign:

1. With the request ready, click [Send] in the upper-right corner.
2. Enter their email address (or addresses) in the **CC** field.
3. Click [Send Request].

They get a copy of the signed doc, with nothing to fill in.

Change a Signer's Email Address Before Sending

Caught a typo in an address? Fix it on the send screen instead of rebuilding the request.

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

To change a signer's email address before sending:

1. Finish setting up the document — you can't edit the address while you're placing fields.
2. Click [Send] in the upper-right corner.
3. Update the address in the *Signers* window.
4. Click [Send Now].

Nothing you built is lost. Once the request has gone out, though, addresses are set — you'd cancel and start a new request.

Keep the Documents You Send Most in One Place

Two of the three starting points send something that already lives in Pipeline. The third has you going back through your own computer for the same disclosure you sent last week.

Your company's Reference page is the shared library — the blank forms, disclosures, training material, and links an admin posts once so nobody on the team has to hunt for them.

See Reference Library & Forms

Get a Missing Signer Onto the List

Starting from a transaction, the checkboxes come from the people already on it. A client who isn't in that list isn't missing from eSign — they're missing from the deal.

Keep the escrow officer, the lender, and the co-op agent right on the transaction, where anyone working the deal can find them.

See Adding a Contact

Frequently Asked Questions

Do I have to start from a transaction?

No — you can start from three places. Start from a transaction when the document belongs to an active deal, from your *Reference* library when you're sending an office form with no transaction yet, or from the *eSign* page when the file is on your computer.

Do my signers need a Paperless Pipeline account?

Signers sign from an emailed link. Each one gets a secure link that opens the document with their fields ready to fill, on any device — no app, no install.

How does my signer actually sign?

They open the email, click the link, and either click [Sign Now] or click the fields directly. [Sign Now] walks them through every required field in order; the red-highlighted fields let them work down the document at their own pace.

What counts as one signature request?

One send is one request. It doesn't matter how many documents, signers, or fields you put in it — the whole package counts once. See Pipeline eSign Settings for what that costs.

Can I control what order the documents appear in?

Yes — they follow the order you select them in. Check the docs in the sequence you want the signer to work through, and the request keeps that order.

Can two people sign at the same time?

Yes — leave the signing order off. Without [Set Signing Order] checked, every signer gets the request at once. What isn't possible yet is putting two signers at the same numbered position within an order; if that's what you need, tell us and your feedback shapes what we build next.