



# DocuSign User Guide

**Published: 8 May 2018**

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# Welcome

Welcome to DocuSign, the global standard for Digital Transaction Management. DocuSign accelerates transactions with the easiest, fastest, most secure network for sending, signing, tracking, and storing documents in the cloud. With DocuSign, you can prepare and execute electronic signature transactions easier and faster than ever before.

## Get started with a video tour

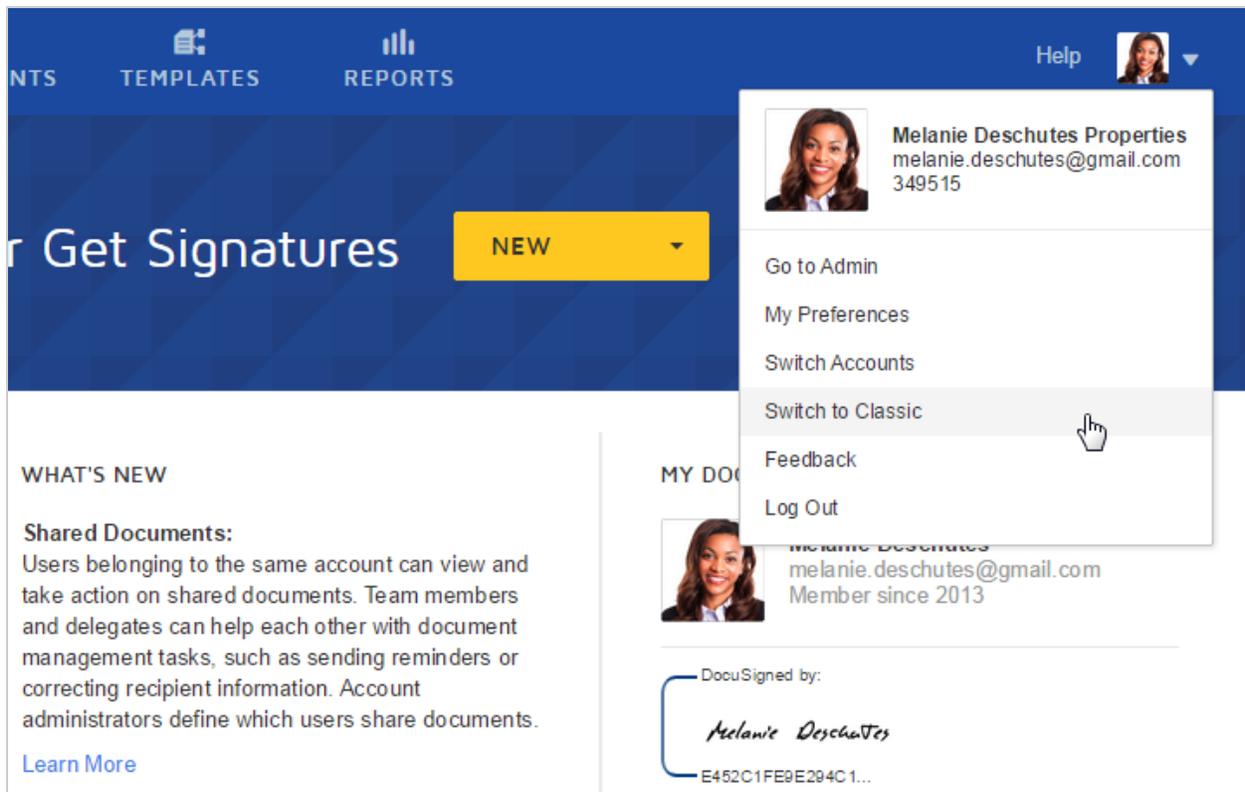
Looking for a preview of how to use the new experience? Get started with our introductory videos covering how to send and manage your documents, and how to create and use templates:

- Sending Documents for Signature—[watch video](#)
- Managing Your DocuSign Transactions—[watch video](#)
- Templates—[watch video](#)
- The Signing Experience for Recipients—[watch video](#)
- Sign a Document Yourself—[watch video](#)

## Continuous improvement

Keep up with the latest news with the **WHAT'S NEW** section on the Home page, and read about the new features and upcoming enhancements. With the new experience, some aspects are new, some are different, and some things are not there. For some account types, everything from the classic DocuSign experience is already available in new

experience. For others, if you do not see something you are used to using, you can always switch back to the classic experience, using the account settings menu at the top right of all the main application pages.



## Help us help you

DocuSign is committed to your success. Tell us how we can do a better job:

- **Product feedback:** Send your product ideas or questions to [new-docusignexperience@docuSign.com](mailto:new-docusignexperience@docuSign.com)

- **Online help:** For feedback about this help system, use the **Send feedback...** link available on any topic page

Here are some other resources to help you:

- **New DocuSign Experience forum:** Visit the [DocuSign Community](#) and connect with other users and share best practices
- **Contact Support:** Need help? Visit our [Contact Support](#) web page for contact options to reach Customer Support.
- **New Experience feature list:** Review the [New DocuSign Experience Feature Availability matrix](#), detailing the available product features.
- **Download a PDF of this guide:** Prefer PDF? [Download a PDF](#) of the complete New DocuSign Experience User Guide.

# Get to Know the New DocuSign Experience

There are five main areas in DocuSign:

- **Home** The Home page provides quick links to start or finish a document transaction and see an overview of your envelopes' status. The bottom panel presents links to suggested knowledge topics and other important resources.

The screenshot shows the DocuSign Home page. At the top is a dark blue navigation bar with the DocuSign logo on the left and four menu items: HOME (with a house icon), MANAGE (with a folder icon), TEMPLATES (with a document icon), and REPORTS (with a bar chart icon). A help icon (question mark) and a user profile icon are on the right. Below the navigation bar is a large blue banner with the text "Sign or Get Signatures" and a yellow "NEW" button. The main content area is divided into three columns. The left column, titled "OVERVIEW" with a "Last 6 Months" filter, lists four categories: "Action Required" (5 items), "Waiting for Others" (2 items), "Expiring Soon" (1 item), and "Completed" (19 items). The middle column, titled "WHAT'S NEW", features two sections: "Shared Template Folders" and "Supplemental Documents". The right column, titled "MY DOCUSIGN ID", shows a user profile for Melanie E. Deschutes, including her email, member since date, and a "DocuSigned by:" signature block. At the bottom, there are three sections: "TIPS AND TRICKS" with a "Have questions?" link, "WE WANT YOUR FEEDBACK" with a "Give Feedback" link, and "HELP AND SUPPORT" with "Support Home" and "Community" links.

- **Send an Envelope** Sending an envelope is quick and easy. You upload the documents you want signed and we combine them into a PDF. Then you specify who needs to sign and what kind of information they will add, such as a signature, initials, or their company name.

[Learn more...](#) or [watch an introductory video.](#)

[←](#) Upload a Document and Add Envelope Recipients [HELP](#) [OTHER ACTIONS ▾](#) [NEXT >](#)

### Add Documents to the Envelope



[UPLOAD](#)

[USE A TEMPLATE](#)

[GET FROM CLOUD ▾](#)

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[≡ IMPORT BULK LIST](#) [ADD FROM CONTACTS](#)  
[SIGNING ORDER](#)

Set signing order

Name  [NEEDS TO SIGN ▾](#) [MORE ▾](#)

Email

[+ ADD RECIPIENT](#)

### Envelope Custom Fields

**\* Declined Reason** Quarterly Reports Text 1

-- Select -- -- Select --

#### Message to All Recipients

Custom email and language for each recipient

Please DocuSign:

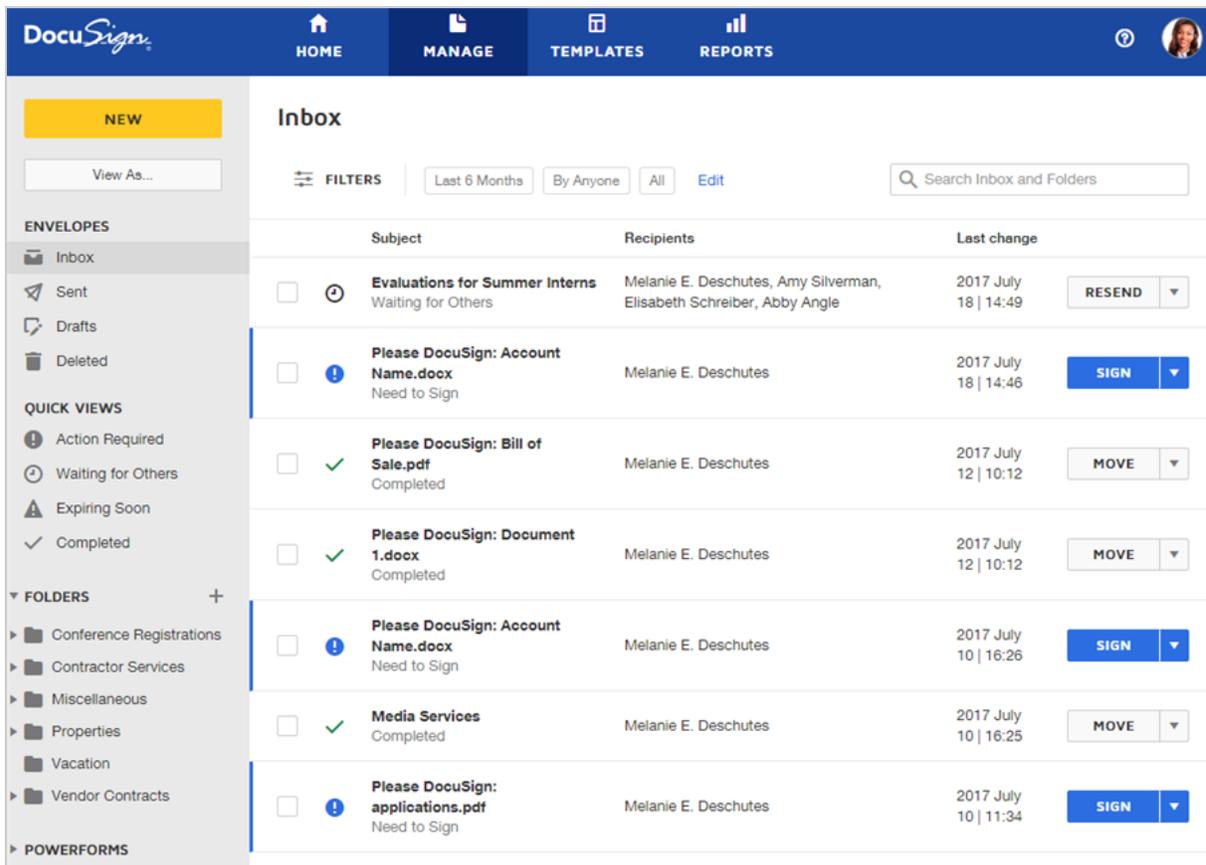
Enter Message

#### Advanced Options | [Edit](#)

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 29 days after send date
- Recipients are warned 2 day(s) before request expires

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- **Manage** The Manage page lists all of your envelopes. You can easily review status, access your files, create folders, search for a specific envelope, and perform additional actions, like resending or creating a copy. You can also start and send a new envelope from this page. [Learn more...](#) or [watch an introductory video](#).



The screenshot displays the DocuSign 'Manage' page. The top navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The left sidebar contains a 'NEW' button, a 'View As...' dropdown, and sections for 'ENVELOPES' (Inbox, Sent, Drafts, Deleted), 'QUICK VIEWS' (Action Required, Waiting for Others, Expiring Soon, Completed), 'FOLDERS' (Conference Registrations, Contractor Services, Miscellaneous, Properties, Vacation, Vendor Contracts), and 'POWERFORMS'. The main area is titled 'Inbox' and features a search bar and filter options (Last 6 Months, By Anyone, All, Edit). The inbox table lists several envelopes with columns for Subject, Recipients, Last change, and action buttons (RESEND, SIGN, MOVE).

	Subject	Recipients	Last change	
<input type="checkbox"/>	<b>Evaluations for Summer Interns</b> Waiting for Others	Melanie E. Deschutes, Amy Silverman, Elisabeth Schreiber, Abby Angle	2017 July 18   14:49	RESEND
<input type="checkbox"/>	<b>Please DocuSign: Account Name.docx</b> Need to Sign	Melanie E. Deschutes	2017 July 18   14:46	SIGN
<input type="checkbox"/>	<b>Please DocuSign: Bill of Sale.pdf</b> Completed	Melanie E. Deschutes	2017 July 12   10:12	MOVE
<input type="checkbox"/>	<b>Please DocuSign: Document 1.docx</b> Completed	Melanie E. Deschutes	2017 July 12   10:12	MOVE
<input type="checkbox"/>	<b>Please DocuSign: Account Name.docx</b> Need to Sign	Melanie E. Deschutes	2017 July 10   16:26	SIGN
<input type="checkbox"/>	<b>Media Services</b> Completed	Melanie E. Deschutes	2017 July 10   16:25	MOVE
<input type="checkbox"/>	<b>Please DocuSign: applications.pdf</b> Need to Sign	Melanie E. Deschutes	2017 July 10   11:34	SIGN

- **Templates** The Templates page provides access to all of your saved templates. You can also create new templates from this page, or select a template to use to start and send a new envelope. [Learn more...](#) or [watch an introductory video](#).

**DocuSign** HOME MANAGE TEMPLATES REPORTS

**My Templates** Search My Templates FILTERS

Filtered by: Date (Last 6 Months) | Edit

Name	Owner	PowerForms	Last change
<input type="checkbox"/> <b>Purchase Orders</b> Eligible for matching	Melanie E. Deschutes		2017 July 18   15:04
<input type="checkbox"/> <b>Board Meeting Notes</b> Eligible for matching	Melanie E. Deschutes		2017 July 18   15:04
<input type="checkbox"/> <b>Group Planning - Fall Quarter</b> Eligible for matching	Melanie E. Deschutes		2017 July 18   15:02
<input type="checkbox"/> <b>Media Services - Western Region</b> Eligible for matching	Melanie E. Deschutes		2017 July 18   15:02
<input type="checkbox"/> <b>Untitled 2017 June 26</b> Eligible for matching	Melanie E. Deschutes		2017 June 26   09:24

- **Reports** The Reports page provides access to the standard reports on documents, recipients, and usage. You can view, edit, and download reports, as well as save customized reports for later use. [Learn more...](#)

The screenshot displays the DocuSign Reports page. The top navigation bar includes the DocuSign logo and four menu items: HOME, MANAGE, TEMPLATES, and REPORTS. Below the navigation bar is a search bar and a sidebar with filter options. The main content area shows a list of 12 reports, each with a title and a brief description.

TYPE		12 Reports
Overview		<b>Recipient Activity Report</b> Detail, status and completion information
All	12	<b>Envelope Report</b> All envelopes sent or received by me.
Envelope	6	<b>Envelope Status Report</b> Totals by status.
Recipient	2	<b>Envelope Velocity Report</b> Envelope completion time.
Usage	4	<b>Envelope Volume Report</b> Status totals for specified time periods.
Custom	0	<b>Envelope Authentication Report</b> Envelope authentication details.
		<b>Envelope Recipient Report</b> Information about envelope recipients.
		<b>Recipient Authentication Report</b> Identity verification data.
		<b>User Activity Report</b> Account activity by user.
		<b>Group Activity Report</b> Account activity by group.
		<b>Account Activity Report</b> Summary user, envelope, and template data.
		<b>Account Authentication Report</b> Summary authentication activity and results.

- **Preferences** In Preferences, you manage your personal preferences, such as your signature and date and time settings, and general application settings for sending

envelopes, and view usage and billing information. [Learn more...](#)

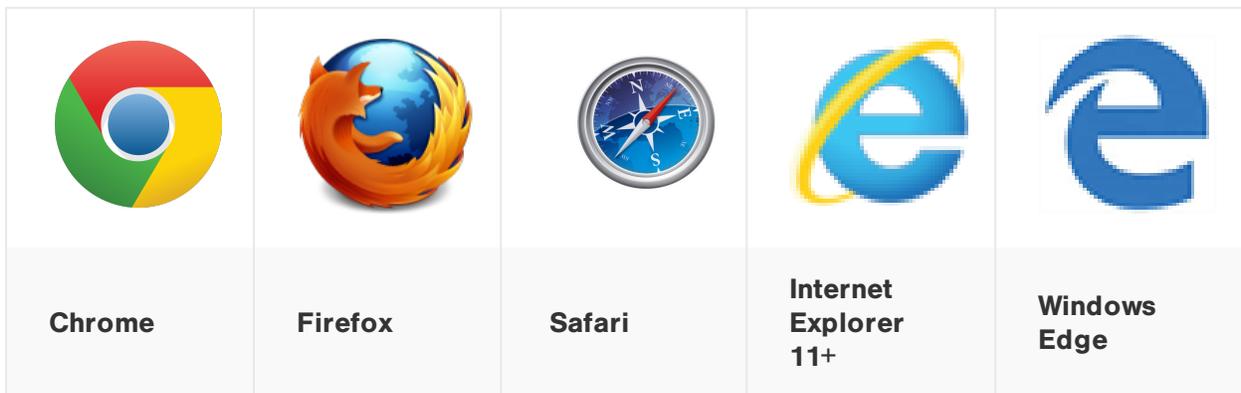
The screenshot displays the DocuSign user interface. At the top, there is a navigation bar with 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS' tabs, along with a user profile icon. A left sidebar lists various account settings under two main categories: 'ACCOUNT' and 'SIGNING AND SENDING'. The 'Personal Information' section is active, showing a user profile for Melanie E. Deschutes. The profile includes a circular photo, the name 'Melanie E. Deschutes' with an 'Edit' link, the email 'melanie.deschutes@gmail.com' with an 'Edit' link, and the account name 'Deschutes Properties, Inc.' with an 'Edit' link. Below the profile information is an 'EDIT PHOTO' button. Underneath, the 'Company and Job Title' section contains two input fields: 'Company' with the text 'Deschutes Properties Co.' and 'Job Title' with the text 'Owner'.

## System Requirements

Most modern computers will work just fine with DocuSign. But just to be thorough, this topic provides the minimum system requirements needed to enjoy the DocuSign experience.

### Supported Browsers

DocuSign supports the latest stable release (except where noted) of the following browsers:



### Screen Resolution

- 1024 x 768 minimum (for desktops and laptops)

## Security

- Allow per session cookies
- Users accessing the Internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection
- Firewall settings must allow access to the following server: <https://docucdn-a.akamaihd.net>. DocuSign leverages Akamai as a content delivery service to enhance our application's performance.

## Supported Languages

DocuSign is available in the following 13 languages, making it easy for global users to send documents for signature in their native language:

- English (U.S.)
- Chinese Simplified
- Chinese Traditional
- Dutch
- French
- German
- Italian
- Japanese
- Korean
- Portuguese (Brazil)
- Portuguese (Portugal)
- Russian
- Spanish

You can set the display language for your DocuSign account through the [My Preferences](#) view, or from the selection menu at the bottom of every page in the application.

**DocuSign** HOME DOCUMENTS TEMPLATES

ACCOUNT

- Personal Information
- Privacy & Security
- Regional Settings**
- Contacts

SIGNING AND SENDING

- Template Matching
- Connected Apps
- Notifications

### Regional Settings

SAVE CANCEL

#### Time and Date

Match my computer's time zone  
 Specify a Time Zone

(UTC-08:00) Pacific Tir

Date/Time Format :  
8/27/2015 | 3:50 PM

#### Language

- English
- English**
- Deutsch
- Español
- Français
- Italiano
- Nederlands
- Português (Brasil)
- Português (Portugal)
- Русский
- 中文(繁体)
- 中文(简体)
- 日本語
- 한국어

English | Powered by DocuSign | Contact Us | Terms of Use | Privacy | Intellectual Property

For account users, administrators can also set the display language for all users through the administration view. [Learn more...](#)

For signers, DocuSign supports 43 localized languages, as listed on our [Global Business Standard](#) web page. Languages are detected through the signers' browser settings.

## How Do I...

Looking for help with a specific DocuSign task? This topic lists common tasks and provides links to the related help topics.

Have a question not covered here?

- Send feedback to [documentation@docusign.com](mailto:documentation@docusign.com) and tell us what you need to know.
- Visit the [DocuSign Community forum](#) and connect with other users and share best practices.
- Visit our [Contact Support](#) web page for contact options to reach Customer Support.
- Get [help](#) for administrators—information on managing users and account settings.

## Working with Recipients

[Send a document to more than one recipient](#)

[Control the order in which people sign my document](#)

[Send a document to two people at the same email address](#)

[Fix recipient information after I've sent a document](#)

[Tell if a recipient has viewed or signed my document](#)

[Require recipients to authenticate their identity](#)

[Help a signer who failed the authentication challenge](#)

Send a document to a group of people for any one of them to sign

Set up reminders for my recipients

Get signatures from people during a face-to-face meeting

Allow recipients to sign on paper

Allow recipients to reassign a document to another signer

Upload a large list of recipients for an envelope

Add people to my DocuSign Contacts list

## Working with Envelopes and Documents

Send a document for signature

Sign a document myself

Know what kind of files I can upload

Download or print a document

Delete a page from a document before I send it

Send a document from my Dropbox or other cloud storage account

Make changes to the recipients, files, or fields in a document

Check the status of an envelope

[Get an audit log for an envelope](#)

[Use zipForm Plus with DocuSign](#)

[Cancel an envelope](#)

[Change the location of the Envelope ID stamp on my documents](#)

[Get more signatures on a completed document](#)

[Resend an envelope](#)

[Send a copy of a completed document to someone](#)

[Set an expiration date for my envelope](#)

[Send a PDF with form fields through DocuSign](#)

[Stop getting so many emails about my documents](#)

## Working with Signing Fields

[Add signing fields to my document](#)

[Know what kind of signing fields I can add to my document](#)

[Make a field optional](#)

[Make a field read only](#)

[Change the size of a field / make tiny fields bigger](#)

[Change the recipient for a field](#)

[Change how a field looks or set other characteristics](#)

[Create a custom field](#)

[Allow recipients to collaborate on a text field entry](#)

[Restrict data entry in a text field to match certain criteria](#)

[Make a field conditional on the entry in another field](#)

[Calculate a result from other fields in my document](#)

[Add a time stamp to signatures](#)

## Working with Templates

[Learn about templates](#)

[Create a template](#)

[Share a template](#)

[Edit a template](#)

[Use a template to start a new envelope](#)

[Apply a template to a document](#)

## Miscellaneous

[Change my signature](#)

[Upload my own signature and initials images](#)

[Change my name](#)

[Change my company or account name](#)

[Change my email address](#)

[Switch to another DocuSign account](#)

[See reports about my account](#)

# Sending Documents for Signature

With DocuSign, getting signatures on a document is quick and easy. You upload the documents you want signed. Then you add the contact information for the people who need to sign and what kind of information they will add, such as a signature, initials, or their company name.

**Note:** if you just need to sign a document yourself (no one else needs to sign), then follow the steps in [Sign a Document](#).

## Sending Documents Video

Here's a two minute video on sending documents to get you started:

[Click here to watch video](#)

## Basic Sending Steps

The basic steps for creating and sending a document for signature are as follows:

1. **Start an envelope.** You can start with a new envelope, use a template stored in DocuSign, or finish a previously saved draft.
2. **Add your documents.** DocuSign supports a broad variety of [file formats](#). Select files from your local machine or from cloud storage providers like Google Drive or Dropbox.

3. **Add recipients.** Specify who receives your envelope and what action you want them to take.
4. **Add messages.** Enter the email subject and message details for your recipients.
5. **Advanced Options.** Set special recipient privileges, reminder settings, and expiration options.
6. **Add fields.** For each recipient, add fields to your documents to gather the desired electronic signatures and other information, such as title, date signed, and more.
7. **Preview and send.** Review your field setup and send the envelope to your recipients.

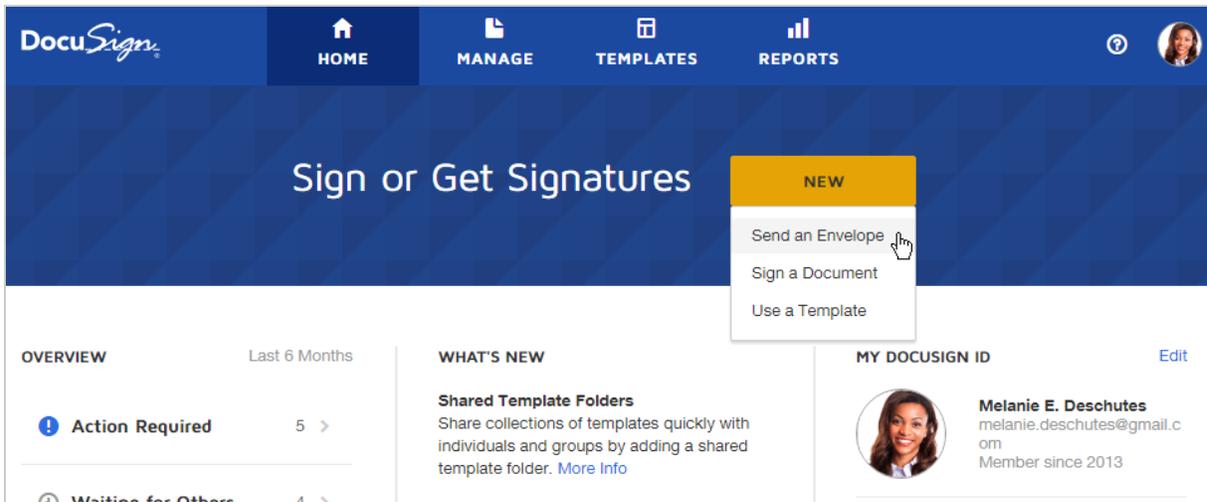
## Using Templates

When you've mastered the basics, check out our [Templates](#) feature. Templates are another way to start and send an envelope. If you have standard documents that you send out time and time again, templates are a great, time saving way to go.

## Start an Envelope

To get signatures from other people, you start an envelope in either of the following ways:

- From the Home page, click the **NEW** drop down and select **Send an Envelope**.
- From the Manage page, click the **NEW** drop down and select **Send an Envelope**



The Prepare view appears.

< Upload a Document and Add Envelope Recipients HELP OTHER ACTIONS ▾ NEXT >

### Add Documents to the Envelope



**UPLOAD**

USE A TEMPLATE

GET FROM CLOUD ▾

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

≡ IMPORT BULK LIST 👤 ADD FROM CONTACTS  
📅 SIGNING ORDER

Set signing order

Name 👤 ✍️ NEEDS TO SIGN ▾ MORE ▾

Email

👤 ADD RECIPIENT

### Envelope Custom Fields

\* Declined Reason Quarterly Reports Text 1

-- Select -- ▾ -- Select -- ▾

#### Message to All Recipients

Custom email and language for each recipient

Please DocuSign:

Enter Message

#### Advanced Options | [Edit](#)

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 29 days after send date
- Recipients are warned 2 day(s) before request expires

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## Start with a template

If you've already [created a template](#), you can use it to start an envelope, through either of the following:

- From the Home page or the Manage page, click the **NEW** drop down and select **Use a Template**, and select the template to use.
- From the Templates page, locate the template you wish to use by searching, filtering, or simply scanning the Template list, and click **USE**.

For more on using templates, see [Use a Template](#).

**Next Step:** [Add Files](#)

## Add Documents to an Envelope

Once you start an envelope, you add the documents you want your recipients to review and sign electronically. DocuSign supports a wide variety of [file formats](#), covering the popular document, presentation, image, drawing, and spreadsheet applications. When you add your files, DocuSign converts them to PDF format for sending and storage.

You can add documents that are stored on your local machine. Depending on your account settings, you may be able to add documents from an authorized cloud storage provider, such as Google Drive or Dropbox. Your DocuSign administrator controls which providers you can use. See [Connected Apps](#) for details.

## CONTENTS

[How to add a document to an envelope](#)

[How to rename a document in an envelope](#)

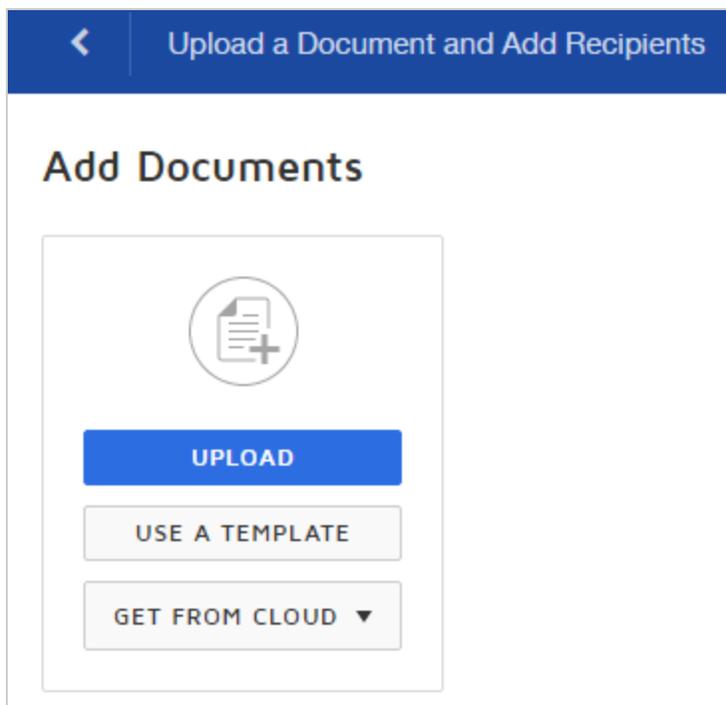
[How to delete or replace a document](#)

[Related topics](#)

## To add a document to an envelope

File names are used to generate the default envelope name and are used when the documents are downloaded using the separate PDFs option.

1. Start a new envelope from **NEW > Send an Envelope**.
2. From the prepare view, to add a file stored on your local machine, click **UPLOAD**.



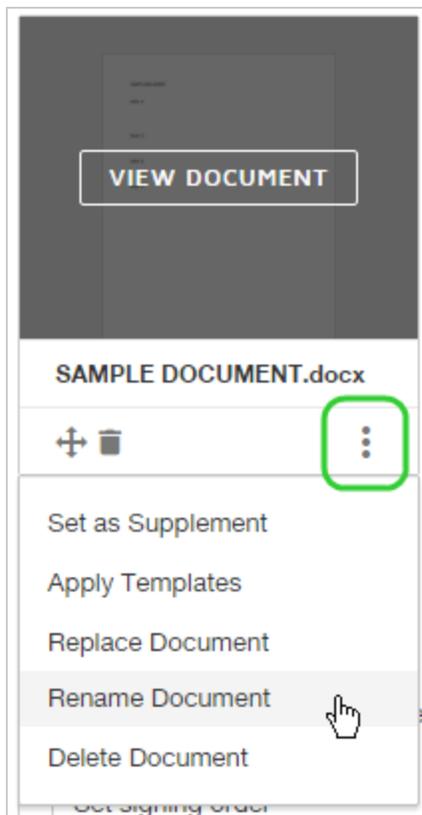
3. To add a file from one of your [authorized cloud storage providers](#), click the **GET FROM CLOUD** drop down and select the provider. Then select your files, and click **ADD SELECTED**.

**Note:** Your account administrator controls which providers are available in the **GET FROM CLOUD** menu for you to select. If you do not see the **GET FROM CLOUD** option at all, your administrator has disabled the feature.

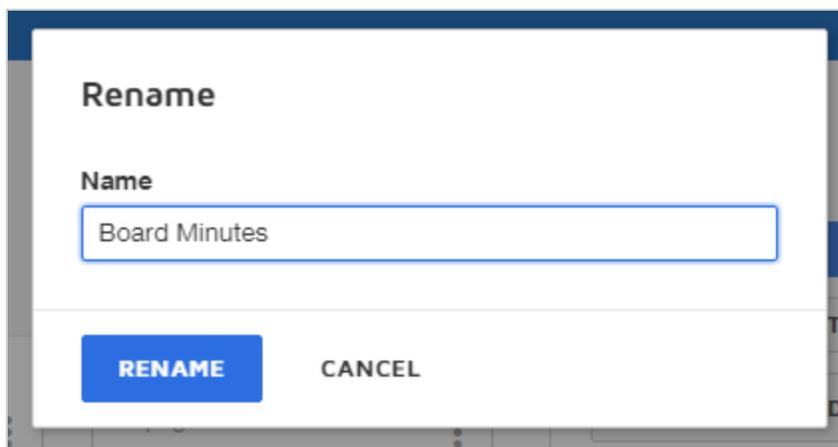
## To rename a document in an envelope

You can change the name of a document after you upload it to a DocuSign envelope.

1. From the prepare view, after you upload a file to an envelope, click the menu icon below the document name and select **Rename Document**.



2. Enter a new name (a file extension is not required).

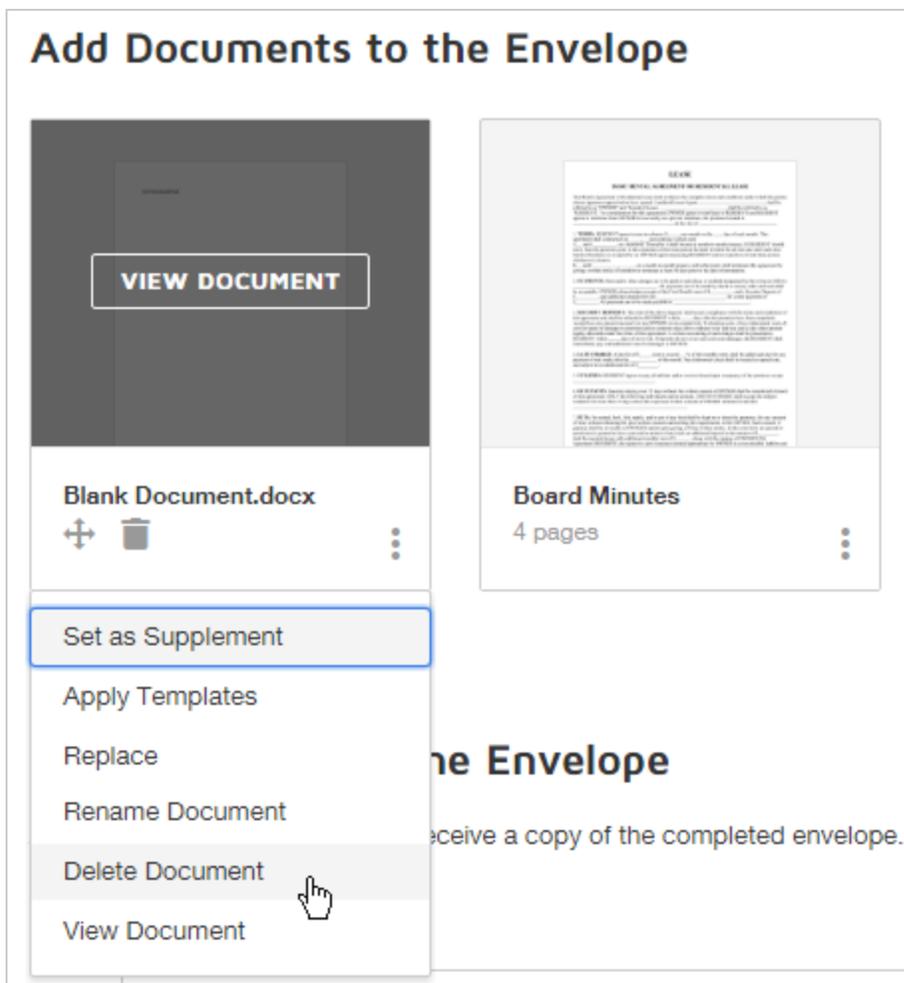


3. Click **RENAME**.

### To delete or replace a document in an envelope

After you upload a file to a DocuSign envelope, you can delete or replace it. If you replace it, any fields already applied on the original document carry through to the new document.

1. To delete a file, from the prepare view:
  - a. Click the menu icon below the document name and select **Delete**.



- b. Confirm your action by clicking **Delete Document**. If there are any fields on the document, they will be removed along with the file.

The file is removed from your envelope.

2. To replace a file, from the prepare view:
  - a. Click the menu icon below the document name and select **Replace Document**.
  - b. Browse and select the replacement file.

The file is replaced in the envelope.

## Related topics

- [Document visibility](#). Control who can see each uploaded file with document visibility rules.
- [Authorize cloud storage providers](#). You can authorize popular cloud storage provider, such as Google Drive or Dropbox, and add files directly from the provider to a DocuSign envelope.
- [Administrators: Select cloud storage providers for the account](#). As an account administrator, you can specify which cloud providers are available for users to authorize and use.
- [Apply templates to files](#). You can manually apply any saved or shared template to the files you upload to an envelope.
- [Use templates](#). You can add templates to an envelope or use a template to create an envelope to quickly populate your transaction with files, recipients, messages, and fields.
- [Adobe form fields](#). If you add a PDF that has form fields, DocuSign automatically recognizes and converts the fields to DocuSign signing fields.

**Previous Step:** [Start an Envelope](#)

**Next Step:** [Add Recipients](#)

## Supported File Formats

DocuSign supports the following file types:

<b>DOCUMENT</b>	.doc, .docm, .docx, .dot, .dotm, .dotx, .htm, .html, .msg, .pdf, .rtf, .txt, .wpd, .xps
<b>IMAGE</b>	.bmp, .gif, .jpg, .jpeg, .png, .tif, .tiff
<b>PRESENTATION</b>	.pot, .potx, .pps, .ppt, .pptm, .pptx
<b>SPREADSHEET</b>	.csv, .xls, .xlsm, .xlsx

**Note:** DocuSign does not support files with password security enabled. To send a file with password security, remove the security setting before uploading the file.

### File size limitations for an envelope

Along with the file format, there are file size limitations for your file uploads.

<b>MAXIMUM FILE SIZE</b>	25 MB
<b>RECOMMENDED SIZE</b>	5 MB

For best performance, DocuSign recommends restricting your file uploads to no more than 5 MB.

The 25 MB maximum file size limit refers to the maximum size of an individual file uploaded to an envelope. There is no limit for the cumulative file size of all files uploaded to an envelope, and no limit to the number of files you can upload.

However, for the completed PDF, if you want it included with the [completed email notification](#), the size of that PDF cannot exceed 5MB. If the final PDF is larger than 5MB, then it is not included in the completed email notification.

## Google file formats

While Google file formats (Docs, Sheets, and Slides) are not supported in their native format, you can upload these file types if you connect your Google Drive cloud storage to DocuSign. Once you've connected, you can use the cloud storage option to add the Google files to an envelope. See "Give DocuSign Access to Your Cloud Storage" on page 67 for details.

## Apply Templates to Files

If you have any saved templates or templates that are shared with you, you can apply them to the documents you upload. When you *apply a template* (as opposed to [use a template](#)), you apply the template setup to your document, adding the recipients, message, and recipient fields, but the documents in the template are not added to your envelope.

## CONTENTS

[Automatic template matching](#)

[Apply templates manually](#)

[Remove applied templates](#)

**Note:** You can use a mix of uploaded documents and templates in an envelope.

## Automatic template matching

This feature evaluates your uploaded files, comparing them to your saved and shared templates that are included in template matching. If the documents are similar enough, you can apply the matching template. Automatic template matching depends on your [account settings to enable the feature](#), and the [matching setting for each template](#).

### To apply a template using automatic template matching

1. Start a new envelope and upload one or more files.
2. If your file matches a previously saved template, depending on your [template matching preferences](#), the template is either applied to your document automatically, or the Select Matching Templates dialog appears for you to choose which templates to apply.

**Select Matching Templates** ✕

Select the matching templates to apply to your uploaded documents.

^ <b>Bill of Sale.doc</b>		
<input type="checkbox"/>	Bill of Sale	Matching: 100% Pages: 1-3
<input type="checkbox"/>	Procedure Plan(1)	Matching: 100% Pages: 1-3
<input checked="" type="checkbox"/>	Sales Agreement	Matching: 100% Pages: 1-3

^ <b>Document 1.docx</b>		
<input type="checkbox"/>	Agreement III	Matching: 92% Pages: 1-1

**APPLY** CANCEL

3. Select the templates you want to apply for each file uploaded, and click **APPLY**. (Click **CANCEL** if you do not want to apply any templates.)

The templates are applied to your documents. The recipients, messages, and recipient fields from the template are added to your document.

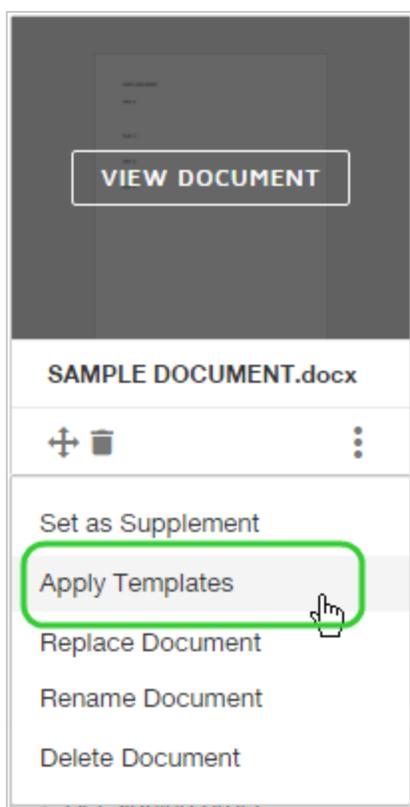
## Apply templates manually

You can select any template to manually apply to your uploaded file to quickly set up recipients, messages, and signing fields. You can specify a starting page number on the document to begin applying the template. For example, if you have a template that you use to add an Initial field to the top right corner of every page, when you apply it to a multi-page document, you can specify to apply the template starting on any page number in your document. If you have a 10 page document and you specify to apply the template starting on page 5, then an Initial field is placed on pages 5-10 of your document.

**Note:** If you set your [template matching preferences](#) to use page-level matching, then you can apply templates to different pages in your document.

### To manually select a template to apply to a file

1. Upload your file to an envelope.
2. Click the menu below the document name and select **Apply Templates**.



3. From the Apply Templates dialog, select the templates to apply to your document.
  - **Suggested:** Templates that meet your account's matching preferences.
  - **Browse:** Search all of your templates, including templates shared with you.

- **Selected:** The list of templates you have selected to apply.

**Note:** If you set your [template matching preferences](#) to use page-level matching, then you can apply templates to different pages in your document.

4. (Optional) To start the template at a particular page in your document, enter the page number under the **Start Page** column:

Apply Templates for test1.docx					
SUGGESTED <b>BROWSE</b> SELECTED (1)					
Initial					
	Name	Match	Page Range	Owner	Start Page
<input checked="" type="checkbox"/>	Initial pages			Melanie E. Deschutes	3

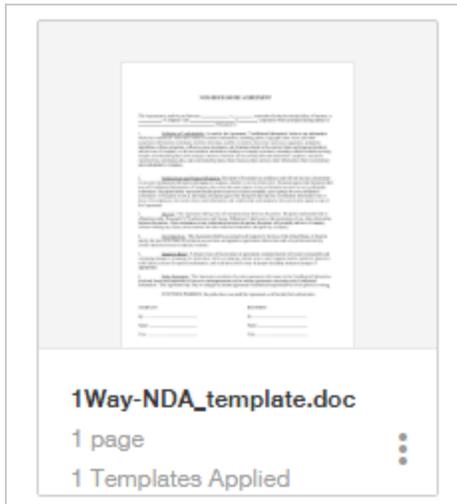
Fields in the template will be applied only from the indicated start page through the end of the document.

5. Click **APPLY SELECTED**.

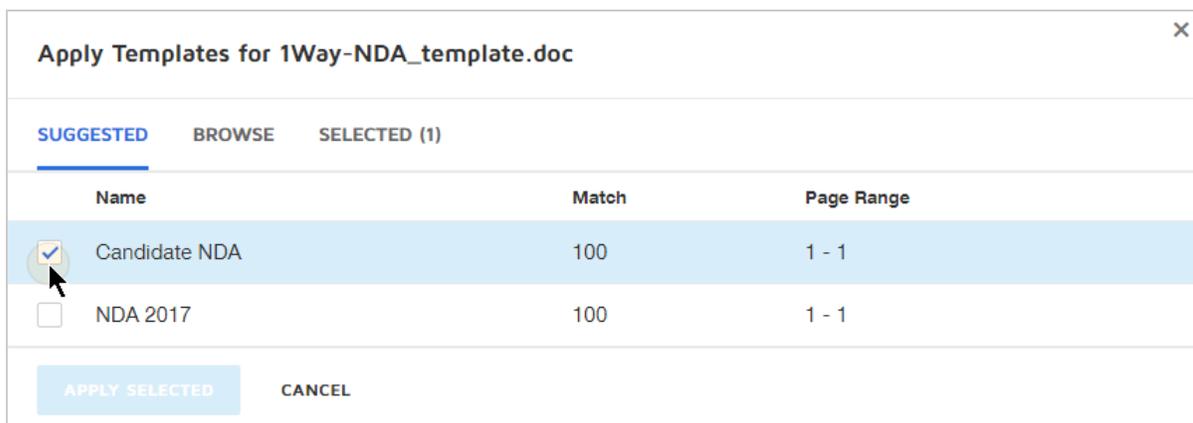
Your template is applied, and the recipient fields, recipients, and messages are added.

## To remove an applied template

1. Files with applied templates indicate how many templates are applied on the file tile.



2. Click the menu icon below the file name and select **Manage Applied Templates**.
3. The Suggested tab shows the templates currently applied.
4. Clear the check mark next to the applied template you want to remove.



5. Click **APPLY SELECTED**.

The template details are removed from the file and envelope.

## Give DocuSign Access to Your Cloud Storage

You can select files stored with cloud storage providers, like Google Drive or Dropbox, to send through DocuSign. To use cloud storage files, you first give DocuSign access to your cloud storage provider. You can disconnect authorized cloud storage providers at any time.

Your DocuSign administrator controls which providers you can use. See [Connected Apps](#) for details.

### CONTENTS

[Supported cloud storage providers](#)

[Give DocuSign access to cloud storage](#)

[To disconnect cloud storage access](#)

[Why don't I see a certain provider in my Connected Apps?](#)

[About Google file formats](#)

## Supported cloud storage providers

The following providers are supported:

- Google Drive
- Dropbox
- Box

- OneDrive (Personal and Business)

**Note:** For OneDrive, both Personal and Business accounts can be connected to DocuSign. However, you can only connect a single OneDrive account; you cannot connect both a Personal and a OneDrive for Business account.

## To give DocuSign access to cloud storage

To use cloud storage files, you first give DocuSign access to your cloud storage provider.

1. Start a new envelope as described in [Start an Envelope](#).
2. In the Add Documents section, click **GET FROM CLOUD** and select the storage provider to access. Icons in gray indicate they are not yet authorized with DocuSign.
3. Sign in to your cloud storage provider account.  
DocuSign is now authorized to access your cloud storage files for the selected provider.

## To disconnect cloud storage access

You can disconnect authorized cloud storage providers at any time.

1. Navigate to the Preferences page, using the account settings menu in the top navigation bar and selecting **My Preferences**.
2. Under the list of Signing and Sending preferences, click **Connected Apps**.  
The Cloud Storage Apps list appears, showing the available storage apps and the connection status.
3. To disconnect a storage app, do either of the following:

- To disconnect a specific app, click the **Disconnect** link next to the provider's name.
- To disconnect all storage apps, click the **Disconnect All Apps** link at the bottom of the list.

DocuSign is no longer authorized for the selected cloud storage apps and you can no longer upload files directly from the apps to DocuSign. You can reauthorize providers at any time by following the first procedure in this topic.

## Why don't I see a certain cloud storage provider in my Connected Apps?

Your DocuSign administrator controls which cloud storage providers you can use. If you do not see some of the [supported providers](#), check with your account administrator.

Administrators can refer to [Connected Apps](#) for details on how to manage the account settings.

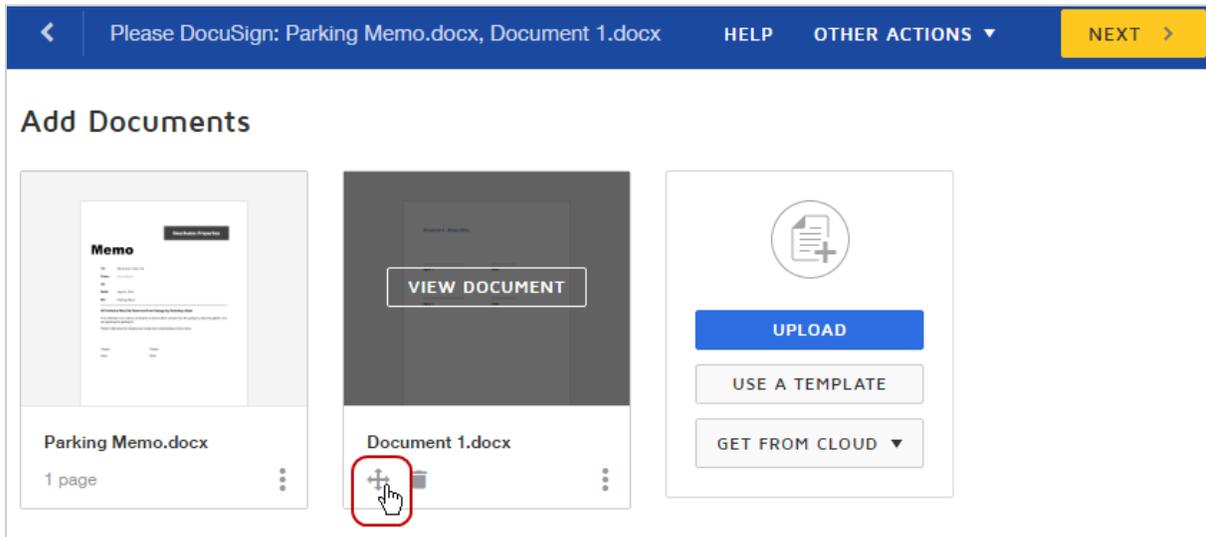
## About Google file formats

Google file formats (Docs, Sheets, and Slides) are not supported in their native format for direct upload. But if you connect your Google Drive cloud storage to DocuSign, you can use the cloud storage option to add the Google files to an envelope. See [Supported File Formats](#) for details.

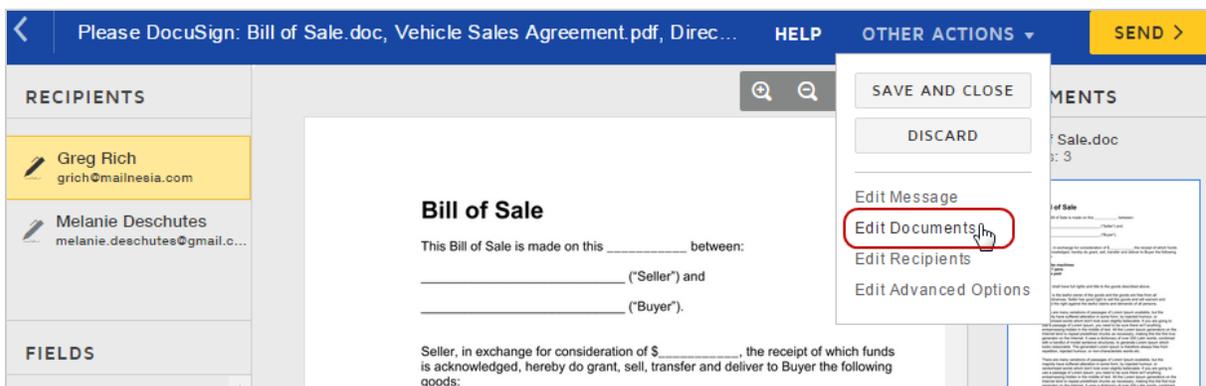
## Reorder Documents

You can change the order of the documents you upload to DocuSign. No matter what order you upload your documents, as long as you have not yet sent the envelope, you can rearrange the order.

- **From the Prepare view** - Hover over the thumbnail image of the document you want to reorder. Click and drag on the directional marker in the lower-left corner of the image, and move the file into the desired position:



- **From the Add Fields view** - Select **Other Actions > Edit Documents**, and then drag and reorder the files:



**See also:** [Add Files](#)

## Use Document Visibility to Control Recipient Access

If you send an envelope containing multiple files and you want to control which files each recipient sees, you can use document visibility to accomplish this. A common scenario is you want recipients to see only those files which they need to sign. With document visibility, you can create one envelope with files intended for individual recipients, rather than having to create a separate envelope for each recipient.

### CONTENTS

[Account settings to use document visibility](#)

[Requirements and limitations](#)

[How to set document visibility on an envelope](#)

### Account settings for document visibility

Document visibility must be enabled for your account by your DocuSign administrator. The feature has multiple settings, which specify the options you have when sending documents. The main difference between these options is in whether the feature is available, and if it is, whether you can choose to enable document visibility controls for any documents you send. The settings are described in [this help guide](#) for administrators.

## Some things to know about document visibility

With document visibility, there are a few unique requirements and limitations you should be aware of:

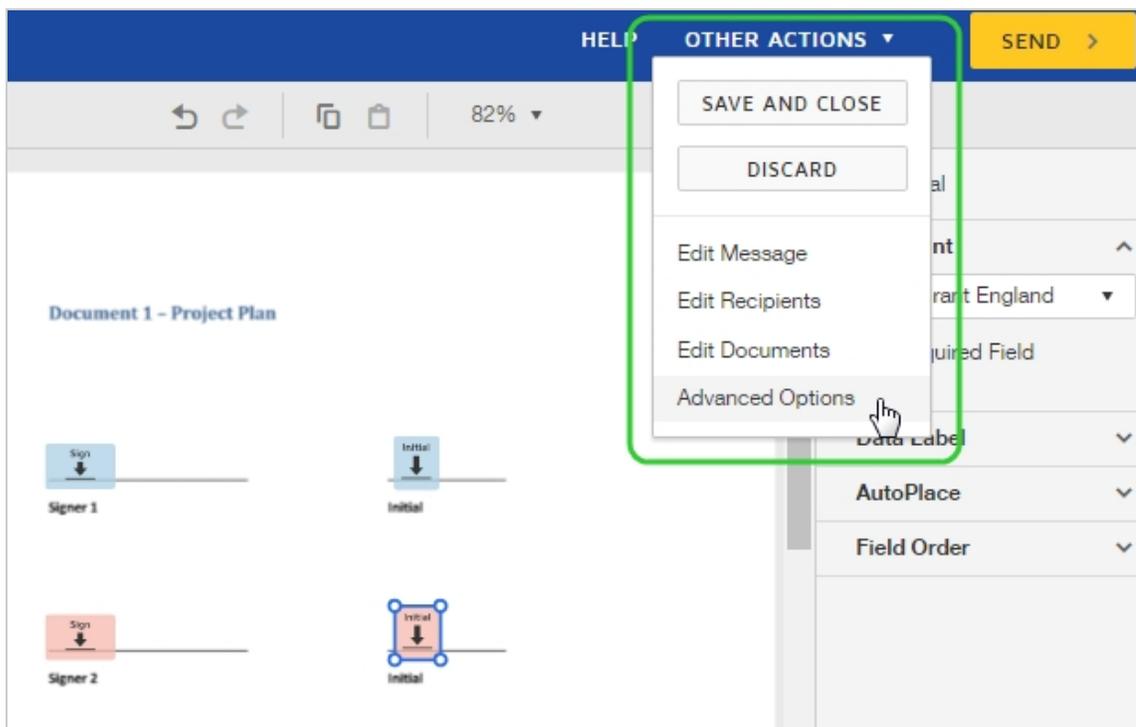
- **Free-form signing is not permitted.** Each recipient who is a signer must have at least one assigned field.
- **Account setting for recipients who are members of your DocuSign account.** When you add fields to a document, visibility is automatically limited to only those recipients with fields placed anywhere on that file. Depending on the [account setting](#) for the feature, if you have recipients who are members of your DocuSign account, you can grant or restrict access to files for which they do not have any assigned fields.
- **Documents without any fields are visible to all recipients.** Documents which do not have any fields placed on them are, by default, visible to all recipients. You can modify the visibility of these files for each recipient before sending.
- **The sender can always see all of the documents.** Your account setting controls whether other account users can also see the documents.
- **Manager recipients can see all documents.** By default, recipients assigned with a manager recipient action (specify, update, allow to edit), or a non-signing recipient action of Receives a Copy or Needs to View, see all the documents in an envelope. You can modify document visibility for each of these recipient types.
- **Document visibility settings are not supported in PowerForms.** A PowerForm signer will see all documents that exist in the PowerForm's associated template, regardless of any document visibility settings applied on the template.

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or

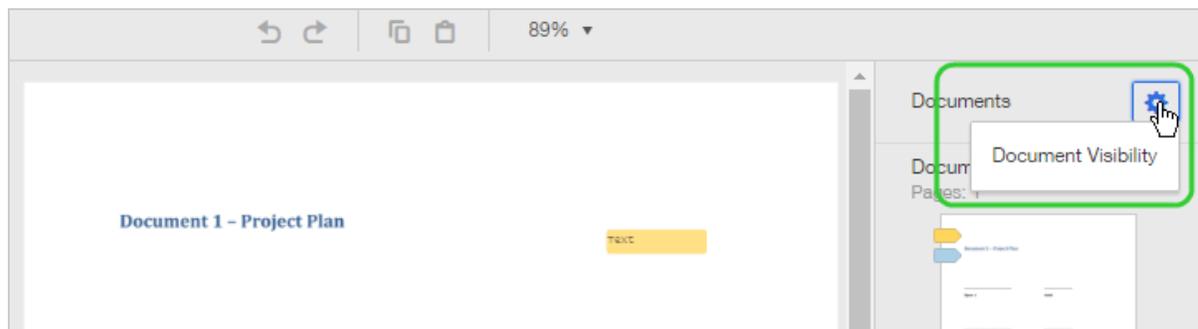
contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## To set document visibility

1. Start a new envelope and prepare it as usual, adding files, recipients, and messages.
2. Continue to the Add Fields view, and add the fields for each of your recipients as described in [Add Fields](#).
3. If your account allows senders to selectively turn on and off document visibility for each document sent:
  - a. Click **Other Actions** and then select **Advanced Options**:



- b. Under Recipient Privileges, select **Recipients must be signers to view signed documents** to turn on document visibility.
4. At the top of the page guide, click the **gear icon** and select **Document Visibility**:



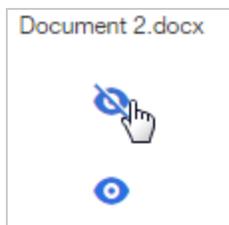
5. The visibility control table opens:

Document Visibility			
			
	Document 1.docx	Document 2.docx	Document 3.docx
Fred Marshall			
Grant England			
Melanie Deschutes			
<a href="#">DONE</a>			

In this example, the following recipient and field information defines the visibility:

- Fred has fields on Document 1 and Document 3 so he sees those files
- Grant has fields on Document 1 so he sees that file
- Melanie is the sender of the document so she sees all of the files
- There are no fields on Document 2, so both Fred and Grant can see the file; the visibility icon is active and can be clicked to change the visibility setting to hide the file

- Since Fred has a field on Document 3 and Grant doesn't, Grant cannot see the file, indicated by the slash through the visibility icon
6. To hide a file from a recipient, click the active blue visibility icon. The icon is marked with a slash to indicate it is now hidden:



7. When you are finished adjusting the visibility settings, click **Done**.
8. Send your document.

Your recipients receive email invitations as usual. However, each recipient sees only the documents that have fields assigned to them, plus any others that are set to be visible.

## Send Supplemental Documents

You can use supplemental documents to provide additional information to recipients which does not require signature, such as legal disclosures or terms and conditions. In signing, supplemental documents are represented by an action strip, keeping them separate from the content your recipients need to sign and reducing the complexity for viewing and signing. Recipients view and accept supplements before they can finish signing.

### Additional Membership Agreement Terms

These documents must be viewed to complete signing.

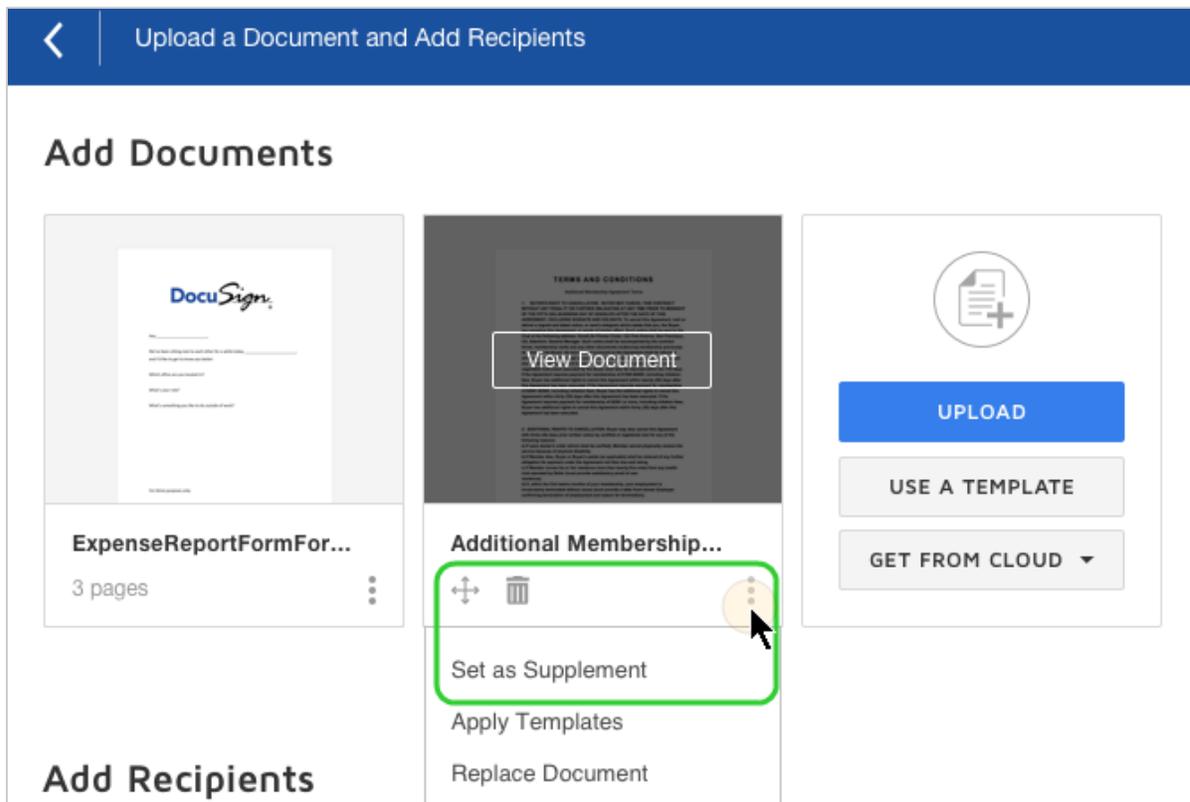
[VIEW](#)

## CONTENTS

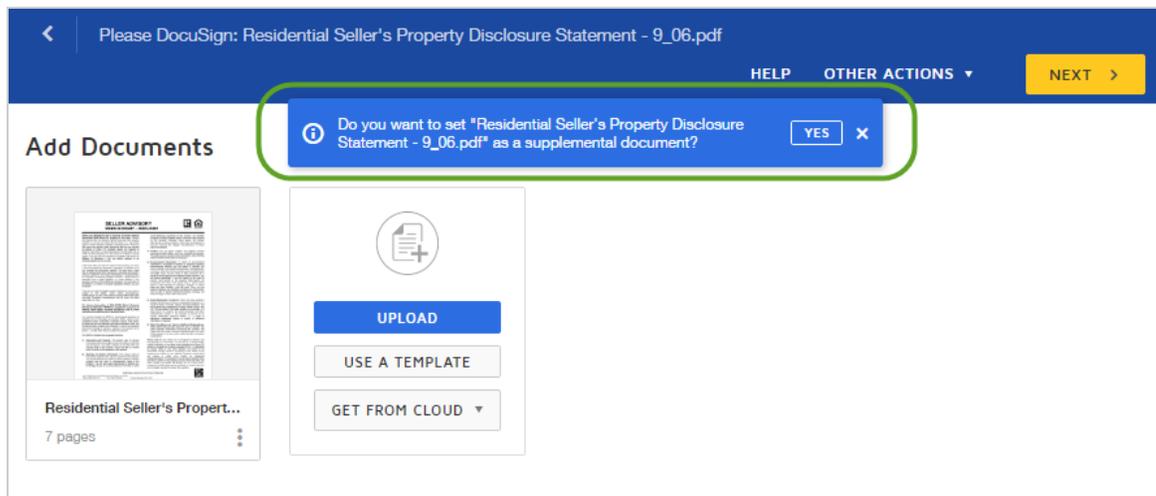
[How to add a supplement](#)[How to specify supplement actions for each recipient](#)[How it works](#)[Audit trail information](#)

## To add a supplement

1. Create a new envelope as usual, adding the files for recipients to view and sign.
2. For a supplement, upload the document just as you would any other file. Then select the document menu under the uploaded file and choose **Set as Supplement**.



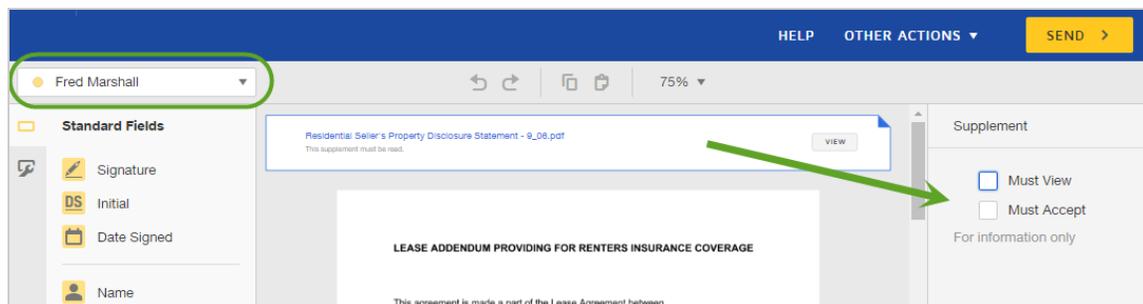
- The system may recognize a file as a potential supplemental document and prompt you to set it as a supplement. Click **YES** to do so.



3. (Optional) Reorder the files and supplements, by clicking on the directional marker in the lower-left corner of the image, and dragging them into the order you want to present to your recipients.

## To specify supplement actions for each recipient

1. After adding a supplement, continue to the Add Fields view.
2. Set the supplement actions for the first recipient on the envelope:
  - a. Click the supplement action strip to open the supplement properties.



- b. In the supplement properties, select the signer actions your recipient must complete in order to finish signing your documents:
  - **Must View:** Recipients must click the **View** button on the supplement strip to open the supplement view, which lets them read through the document, and download or print it.
  - **Must Accept:** Recipients must click the **Accept** button on the supplement strip.
  - **Must Read:** Recipients must open the supplement view and scroll to the end of the supplement. This action is available only if both **Must View** and **Must Accept** actions are selected.
3. Select the next recipient on your envelope and set their supplement actions. Repeat for all remaining recipients.
4. Finish preparing your documents, adding fields as needed, and then send the envelope.

## How it works

With supplemental documents, you can provide information necessary to meet regulatory or other internal compliance requirements of your industry or operation. All delivery, receipt, access, and acknowledgment actions are recorded in the Document History and the Certificate of Completion, providing a complete audit trail.

Supplements are mainly intended for recipients who must sign a document; that is, for recipients who are assigned the Needs to Sign or In Person Signer recipient type. If you have Receives a Copy recipients who simply receive a copy, they can view any included supplements, but are not assigned any recipient actions.

You can add multiple supplements to an envelope, and reorder them to dictate how they appear in signing with the other files sent for signature.

For each supplement, you assign the required recipient actions for each recipient. You assign actions for each recipient who is a signer on the document. Recipients must complete the actions before they can finish signing the document. Fields cannot be added to supplements; the recipient actions are the only controls added to supplements.

You can use [document visibility](#) to control which recipients can view a supplement.

**Note:** Supplemental documents must be enabled for your account and included in your user [permissions set](#). Check with your DocuSign administrator if you do not have access to the feature as presented in this help guide.

## Audit trail information

Supplemental document interactions are logged in both the [History and Certificate of Completion](#) for an envelope.

### History

When viewing an envelope's history through the DocuSign web application, the action taken (viewed or accepted) by the recipient for the supplemental document, and a short description of the event, are included. The name of the supplemental document is included in the description.

### Certificate of Completion

Supplemental document information is shown in two places in the Certificate of Completion:

- **Source Envelope Information section** – Shows the total number of pages for all supplemental documents associated with the envelope.
- **Recipient Event sections** – Includes the name of the supplemental document and time stamps for the first time a recipient viewed the document, when a recipient finishes a must read action, and for when the recipient accepted the supplemental document (if required).

## Add Recipients

Once you select the documents to send, you add the recipients who will receive and sign your documents, or just receive a copy. You provide an email address and name for each recipient. Recipients do not need a DocuSign account. Even without an account, they can still open your document and complete their signing action.

### CONTENTS

[Adding recipients \(basic\)](#)

[What are the different actions you can assign to recipients? \(video\)](#)

[Use the Contacts list to add recipients](#)

[Receive a copy of the completed documents](#)

[Include the same recipient more than once](#)

[Send a document to two people who share an email address](#)

## To add recipients

1. From the prepare view, enter the email address and name of your first recipient.

### Add Recipients

As the sender, you automatically receive a copy of the completed documents.

 IMPORT BULK LIST  
 ADD FROM CONTACTS  
 SIGNING ORDER

Set signing order

 NEEDS TO SIGN ▼ MORE ▼

 ADD RECIPIENT

**Note:** To add a fax recipient, see the guide [Fax Documents for Signature](#).

2. To set the appropriate action for the recipient, choose one of the following from the drop-down list:

#### Document recipients:

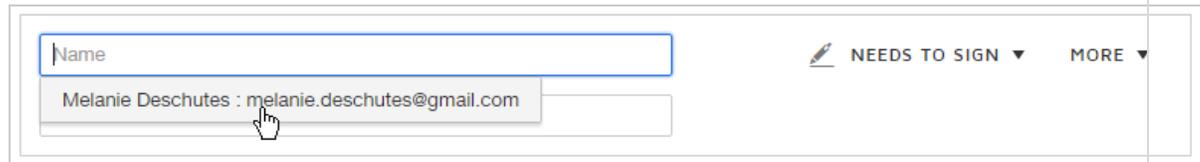
- **Needs to Sign** - recipient must complete the required fields assigned to them, such as, signature, initial, and date.
- **In Person Signer** - a DocuSign account holder hosts the signing session for the recipient. [Learn more...](#)
- **Receives a Copy** - recipient receives a copy, with no further action required.
- **Needs to View** - recipient must open and view the document.

#### Manager recipients: [Learn more...](#)

- **Specify Recipients** - recipient can fill in the name and email address of the role recipients who are at their same position or later in the signing order.

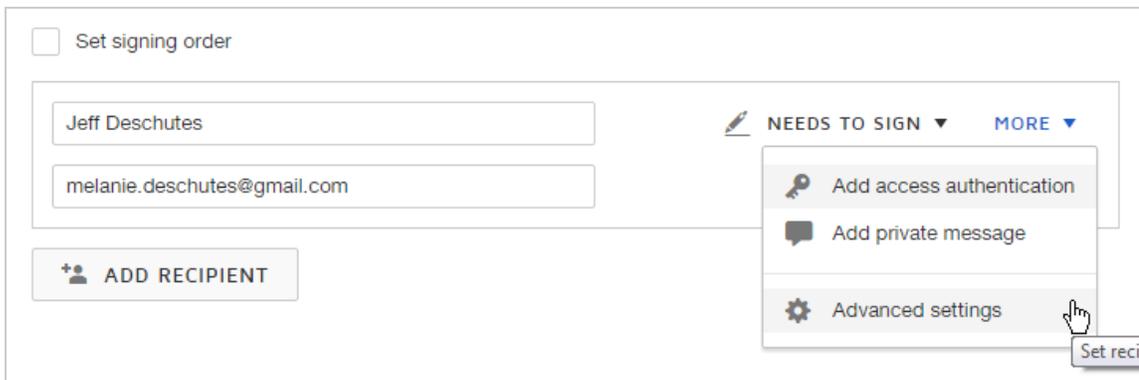
- **Update Recipients** - recipient can edit recipient details for any remaining recipients in the signing order.
  - **Allow to Edit** - recipient can make recipient and document changes (correct) to an in process envelope. This recipient must have a valid DocuSign account.
3. To add additional recipient rows, click **ADD RECIPIENT**.

**TIP:** To add yourself as a recipient on a document, type "@me" in the **Name** field. Or just click in the **Name** field and then select your name and email in the pop up:



The screenshot shows a recipient row in a DocuSign interface. The 'Name' field is highlighted with a blue border. Below it, a dropdown menu is open, showing 'Melanie Deschutes : melanie.deschutes@gmail.com' with a mouse cursor pointing to it. To the right of the name field, there are two dropdown menus: 'NEEDS TO SIGN' and 'MORE'.

4. (Optional) Specify a signing order for the recipients to control the order in which your recipients receive and sign your documents. For more information, see the guide [Set a Signing Order](#).
5. (Optional) To require a recipient to provide additional information to identify themselves during the signing process, add an authentication method:
- a. In the recipient's row, click the **More** drop down and select **Add access authentication**.



- b. Select an authentication method for the recipient and complete the required fields.  
[Learn more...](#)
- c. Click **Close** to collapse the authentication information.

The summary authentication details appear below the recipient information.



**Note:** For enhanced security, you can add an access code plus an identity authentication method (phone, sms, or ID check).

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## Recipient actions video

You can assign different actions to the recipients of your document, such as to sign or just receive a copy. Here's a two minute video on the different actions you can assign:

[Click here to watch video](#)

**Note:** The Needs to View recipient action is equivalent to the Acknowledge Receipt feature in the classic experience. Some recipient actions are available for select plans only and may not be included in your account.

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## Use the Contacts list to add recipients

Your DocuSign account includes a [Contacts list](#). You can select recipients from your Contacts list to add to an envelope. Your [permission settings](#) control the types of contacts you have access to.

**Note:** If your permission settings allow you to create personal contacts, when you send an envelope, the recipients are added to your Contacts list automatically, so you only have to enter their information once.

## To use the Contacts list to add recipients

1. From the prepare view, click **Add From Contacts**, located at the top right of the recipients.

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

Set signing order

  SIGNING ORDER





 NEEDS TO SIGN   MORE 



2. If you are a regular user and not an account administrator, in your Contacts list:
  - a. Select recipients from the Address book category, which can contain any of the following depending on your permission settings: personal contacts, contacts shared with you, and account signing groups.
  - b. Click **ADD SELECTED**.
3. If you are an account administrator with All Administration Capabilities, you can select recipients from either of the following categories:
  - **Address Book**: contains your personal contacts and contacts shared with you, and all signing groups.

- **Directory:** contains all active users on your account.

Name	Email	Company
<input type="checkbox"/> Abbie Newton	abbie.newton@mailnesia.com	French Market
<input type="checkbox"/> Abby Angle	angle@mailinator.com	Zynx, Inc.
<input type="checkbox"/> Abigail Pfeiffer	apfeiffer@mailinator.com	
<input type="checkbox"/> Alex Designs	alex.designs.sf@gmail.com	Alex Designs SF
<input type="checkbox"/> Alex Designs	alex.designs.sf@gmail.com	Alex Designs SF

#### 4. Set the appropriate action for each added recipient.

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### Receive a copy of the completed document

Your account and personal preferences may be set such that you automatically receive a copy of the completed documents by email. If your account administrator enables sending the PDF with the completed email notification, and you [opt to receive the completed email notification](#), then you will receive an emailed copy of your documents once all recipients have completed signing.

If you do not need to sign the document, then there is no need to add yourself as a recipient. You can always view or download the completed documents from within your DocuSign account, or use the copy sent to you with the completed email notification.

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## Include the same recipient more than once

If you need to send documents to the same person more than once, you must specify a signing order. You cannot have the same recipient listed more than once at the same position in the routing order.

1. From the prepare view, select the **Set signing order** check box.
2. Add your recipients, including the same recipient listed more than once.
3. Adjust the routing order and recipient type as needed.

Set signing order

1	<div><input type="text" value="Guy Swanson"/> </div> <div><input type="text" value="swanson@mailnesia.com"/> <input type="text" value="swanson@mailnesia.com"/></div>	NEEDS TO SIGN ▼  MORE ▼
2	<div><input type="text" value="Axel Aire"/> </div> <div><input type="text" value="axelaire@mailinator.com"/> <input type="text" value="axelaire@mailinator.com"/></div>	NEEDS TO SIGN ▼  MORE ▼
3	<div><input type="text" value="Guy Swanson"/> </div> <div><input type="text" value="swanson@mailnesia.com"/> <input type="text" value="swanson@mailnesia.com"/></div>	NEEDS TO SIGN ▼  MORE ▼

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## Send an envelope to two recipients at the same email address

With DocuSign, you can easily send documents for signature to two people who are sharing an email address. You add both parties as recipients, using the same email address and their own names. You assign recipient fields for signing, dating, etc., for each person.

Each recipient receives a notification email at the shared email address. The email contains a unique link to view the documents with that recipient's signing fields.

Once you send an envelope, the recipients are added to your Contacts list. The next time you enter that shared email address for a recipient, you'll see both recipients as suggested contacts. You can select which recipient you want to send to.

## To add multiple recipients with the same email address

1. From the prepare view, add the name and email of your first recipient.
2. Click **ADD RECIPIENT**.
3. For the new recipient, enter the same email address as the first recipient and the new recipient's name.



The screenshot displays a list of two recipients in a DocuSign interface. Each recipient is represented by a card with a name field, an email field, and action buttons. The first recipient is Melanie Deschutes, and the second is Jeff Deschutes. Both have the email address melanie.deschutes@gmail.com. The action buttons for each recipient include a pen icon, the text 'NEEDS TO SIGN', and a 'MORE' dropdown menu.

Melanie Deschutes	 NEEDS TO SIGN ▼	MORE ▼
melanie.deschutes@gmail.com		
Jeff Deschutes	 NEEDS TO SIGN ▼	MORE ▼
melanie.deschutes@gmail.com		

[Back to Top](#)[Previous Step: Add Files](#)[Next Step: Add Envelope Custom Fields](#)

## Fax Documents for Signature

You can fax documents to a signer and track the transaction through your DocuSign account. This guide explains how sending documents to sign by fax works.

### CONTENTS

[Fax documents for signature](#)[Track the status of a faxed envelope](#)[How sending by fax works](#)[Restrictions and limitations for this feature](#)[How many times will DocuSign attempt to redial a fax number?](#)

### To fax documents for signature

1. Create a new envelope as usual, adding the documents for recipients to view and sign.
2. To add a fax recipient, first select the **Fax** option in the drop-down.

### Add Recipients

As the sender, you automatically receive a copy of the completed documents.

[IMPORT BULK LIST](#)

[ADD FROM CONTACTS](#) [SIGNING ORDER](#)

Set signing order

1

Name  

**NEEDS TO SIGN** ▼ **MORE** ▼ ✕

Email ▼

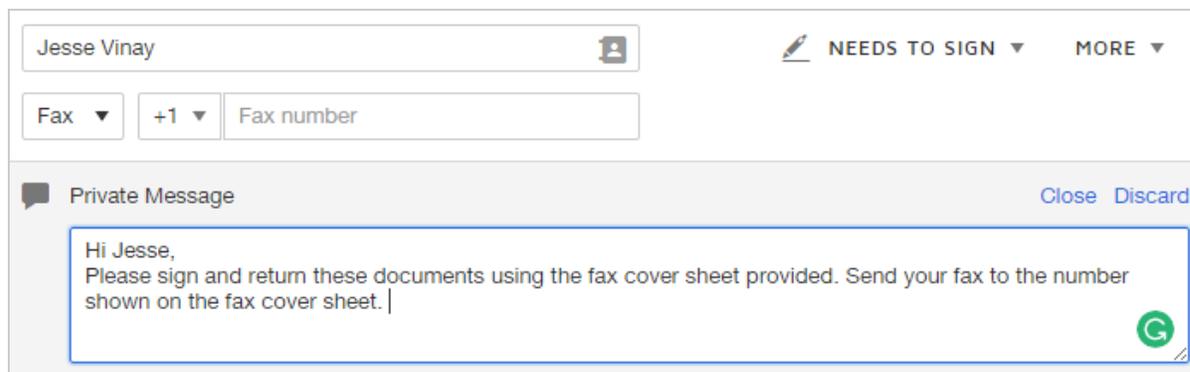
Email

Fax

 **ADD RECIPIENT**

3. Enter the fax recipient's **name** and **fax number**.
4. Set the fax recipient's action to either **Needs to Sign** or **Receives a Copy**.
5. To include a note to the fax recipient on the fax cover sheet, click **More** and select **Add private message** and enter your message.

**TIP:** Use the private message to instruct the fax recipient to return the signed document with the DocuSign fax cover sheet. If the fax recipient fails to use the provided fax cover sheet and faxes the document normally, the fax recipient's actions will not be recorded in your DocuSign account.



The screenshot shows a DocuSign interface for a document recipient named Jesse Vinay. At the top, there is a name field with a profile icon, a status indicator 'NEEDS TO SIGN', and a 'MORE' dropdown menu. Below this is a 'Fax' dropdown menu, a '+1' dropdown menu, and a 'Fax number' input field. A 'Private Message' section is visible, containing a message: 'Hi Jesse, Please sign and return these documents using the fax cover sheet provided. Send your fax to the number shown on the fax cover sheet.' The message is enclosed in a blue-bordered box with a green circular icon in the bottom right corner. 'Close' and 'Discard' buttons are located to the right of the message box.

6. If you added other email recipients, you can enter the message for them in the **Message to All Recipients** section. Fax recipients do not see the email message.
7. Click **NEXT** to proceed to the Add Fields view.
8. If you added other email recipients, add fields for them, and make any other adjustments to the documents as needed, such as rotate or remove pages.
9. Send the envelope.
10. When the fax recipient receives your fax, they complete the document and then fax it back to DocuSign using the provided cover sheet.

**IMPORTANT:** The fax recipient must use the provided fax cover sheet and fax back the completed documents to the phone number listed on the cover sheet. Numbers are provided for different geolocations.

## To track the status of a faxed envelope

Once you send an envelope to a fax recipient, you can monitor the progress just like you would any regular email recipient.

- **View recipient status in Details** - Locate the envelope in your Manage list and click it to open the Details view. The fax recipient's information and latest action on the envelope are shown.

**Please DocuSign: Permission form - Media.docx**  
Sent On: Feb 8, 2017 | 09:34

⌚ **Waiting for Others**

RESEND   CORRECT   MOVE TO ▼   MORE ▼

📄 ▼   🖨️

**Recipients**   **SIGNING ORDER**

**Fred Marshall**  
888648...   **Needs to Sign**

📧 **Private Message:** Fred, We need your signature on this permission form before we can proceed with the shoot. Please use the fax cover sheet provided and return the completed form to the number shown.

Permission form - M...  
Pages: 1

- **Completed fax is appended to the sent documents** - From the Details view, the returned fax from the signer is added to the documents that you sent. The file name is "Signed-on-Paper\_" followed by a unique identifier. You can see the file in the thumbnail view and it is included when you download or print the documents.

The screenshot displays the DocuSign interface for a document titled "Media.docx". The main area shows a "SIGNED ORDER" with a signature icon and the text "Signed on Feb 8, 2017 | 09:56". To the right, a sidebar lists document pages. The first page is "Permission form - M..." with 1 page. The second page is "Signed-on-Paper\_45..." with 2 pages, and this section is highlighted with a red border. Below the thumbnails, the text "is" is partially visible.

- **History lists fax actions** - From the Details view, click **More** and select **History**. All fax recipient actions are listed in the History.

Activity History				
Time	User	Action	Activity	Status
Feb 8, 2017   09:31	Melanie R. Deschutes (English (US)) [api:10.103.101.11]	Registered	The envelope was created by Melanie R. Deschutes	Created
Feb 8, 2017   09:34	Melanie R. Deschutes (English (US)) [web:174.46.233.194]	Sent Invitations	Melanie R. Deschutes sent an invitation to Fred Marshall [888648 Subject]	Sent
Feb 8, 2017   09:56	Fred Marshall (English) [api:255.255.255.255]	Received Fax	Fax received from Fred Marshall that contains paper with hand signature	Completed

- **The signature event is recorded in the Certificate of Completion** - From the History, click **View Certificate**, then open the downloaded certificate.

Certificate Of Completion		
Envelope Id: 23190060B10442C89C23FA732DE8CEA1	Status: Completed	
Subject: Please DocuSign: Permission form - Media.docx		
Code:		
Declined Reason:		
Source Envelope:		
Document Pages: 3	Signatures: 0	Envelope Originator:
Supplemental Document Pages: 0	Initials: 0	Melanie R. Deschutes
Certificate Pages: 1		
AutoNav: Disabled	Payments: 0	123 Danser Blvd
EnvelopeId Stamping: Enabled		San Francisco, CA 90001
Time Zone: (UTC-08:00) Pacific Time (US & Canada)		melanie.deschutes@gmail.com
		IP Address: 10.103.101.11
Record Tracking		
Status: Original	Holder: Melanie R. Deschutes	Location: DocuSign
Feb 8, 2017   09:31	melanie.deschutes@gmail.com	
Signer Events	Signature	Timestamp
Fred Marshall	<b>Completed</b>	Sent: Feb 8, 2017   09:34
888648		Viewed: Feb 8, 2017   09:56
Sr. Director	Using IP Address: 255.255.255.255	Signed: Feb 8, 2017   09:56
My company		
Security Level: Fax, Account Authentication (None)		
Electronic Record and Signature Disclosure:		
Not Offered via DocuSign		
ID:		

## How it works

When an envelope is sent to a fax recipient, DocuSign adds a fax cover sheet and faxes the documents to the recipient's fax number. The recipient signs the faxed documents, fills out the DocuSign fax cover sheet, and then faxes the completed documents back to DocuSign using the number shown on the cover sheet.

When DocuSign receives the fax, the documents are attached to the envelope and the envelope is completed or sent to the next recipient in the routing order.

The Document History and Certificate of Completion include the fax recipient's actions and information as part of the envelope's secure audit trail.

**IMPORTANT:** The fax recipient must fax back the completed documents to the phone number listed on the cover sheet. Numbers are provided for different geolocations.

## Using a signing order with fax recipients

You can include fax and regular email recipients on the same envelope. The envelope is sent to recipients in the signing order you specify. When the signing order reaches a fax recipient, the documents are faxed to the recipient. When the fax recipient returns the documents, the envelope is sent to the next recipient in the order.

## Restrictions

- Fax recipients cannot share a position in the signing order. The recipient of a fax must be the only recipient in a particular routing order position. This prevents potential problems with the envelope workflow.

- You cannot use authentication (access code, knowledge based, phone authentication, or SMS authentication) for a fax recipient.
- Document visibility must be off for your account in order to specify a fax recipient. Administrators can refer to [this topic](#) for information on configuring document visibility.
- You cannot add fields for fax recipients.
- Manager recipients with an action of Specify Recipients, Update Recipients, or Allow to Edit that are in a routing order before a fax recipient cannot change the delivery or fax number for the fax recipient.
- After an envelope is sent, you can correct a fax recipient in the current routing only if the fax delivery fails. You can correct fax recipients later in the routing order.

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## Automatic redial attempts

DocuSign attempts to fax the recipient four times. If the fax number is busy or rings 10 times without being answered on the initial attempt, the system tries to resend the fax 3 minutes later. If that attempt fails, it tries again 5 minutes later, and if that attempt fails, it tries 10 minutes later. After four attempts, the fax is considered to have failed. Or if the system gets a voice answer during any fax attempt, the fax is considered to have failed.

If the fax attempts fail, you can either [resend](#) the envelope or [correct](#) to edit the fax number and resend the envelope.

## Signing Groups

Signing groups enable you to send an envelope to a predefined group of recipients and have any one member of the group sign your documents. When you send an envelope to a signing group, anyone in the group can open it and sign it with their own signature.

### **Example — Legal Approval**

Your Facilities team negotiates services and leasing contracts, which require legal approval from a member of the Legal team. Your DocuSign administrator creates a signing group comprised of the members of your in-house legal team. You use the signing group to send the document to the legal team. Each member of the signing group receives a notification to review and sign off on the contract. One of the lawyers opens the contract, reviews and then approves it, allowing you to complete the contract with the vendor.

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[How to send an envelope to a signing group](#)

[Notifications and signing groups](#)

[Tracking signing group activity](#)

[Limitations and restrictions](#)

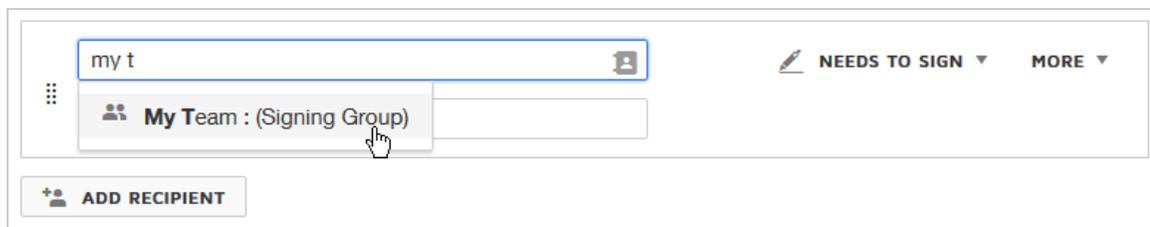
[Viewing signing groups in your Contacts list](#)

[Setting up signing groups](#)

### To send an envelope with a signing group recipient

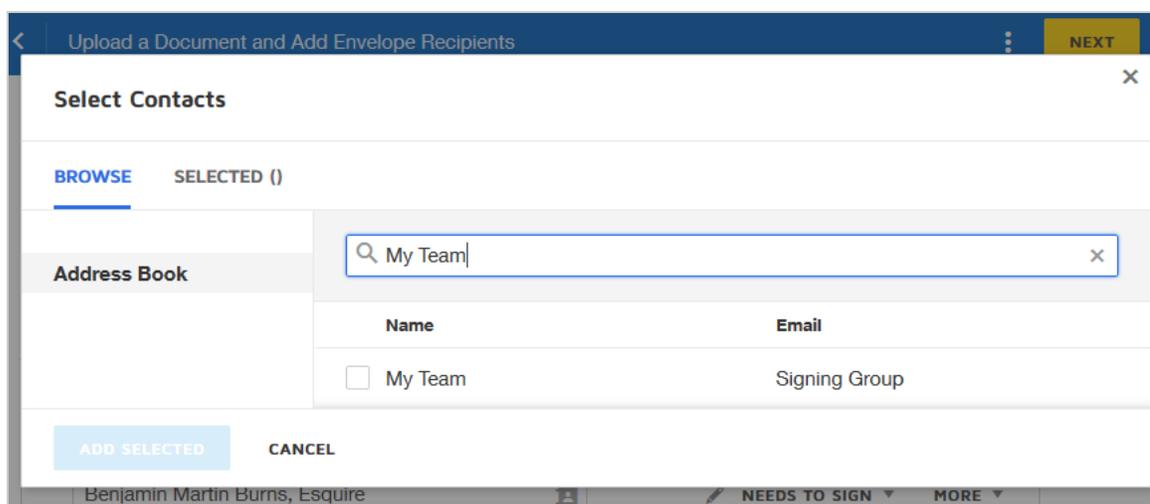
1. Start a new envelope as described in [Start an Envelope](#) and add documents as usual.
2. To add the signing group as a recipient, do one of the following:

- Start typing the group name in the Name field and select it from the pop up:



The screenshot shows a text input field containing "my t". Below the field, a dropdown menu is open, displaying a search result: "My Team : (Signing Group)". A mouse cursor is hovering over this result. To the right of the input field, there are two dropdown menus: "NEEDS TO SIGN" and "MORE". Below the input field, there is a button labeled "ADD RECIPIENT".

- Click **Add From Contacts**, select the Address Book category, and locate the group you want to add by scanning the list or searching for the group name.



The screenshot shows a dialog box titled "Select Contacts" with a close button (X) in the top right corner. The dialog has two tabs: "BROWSE" (selected) and "SELECTED ()". Under the "BROWSE" tab, there is a search bar with the text "My Team" and a search icon on the left and a close icon (X) on the right. Below the search bar, there is a table with the following content:

Name	Email
<input type="checkbox"/> My Team	Signing Group

At the bottom of the dialog, there are two buttons: "ADD SELECTED" and "CANCEL". The background of the dialog shows a document titled "Benjamin Martin Burns, Esquire" with a "NEEDS TO SIGN" status and a "MORE" dropdown menu.

3. Finish preparing your envelope as usual and send it.

Each member of the signing group receives the email notification to view and sign your documents. Only one member can complete the signing responsibility.

Or, if the signing group was set up to use an alternate email address for notifications, then all communications are sent to that email address and not to the individual group members.

## Notifications and signing groups

Notification behavior depends on whether or not the signing group was set up to use an alternate email address for notifications.

- **If the group uses an alternate email address**, then all communications are sent to that email address and not to the individual group members. Group members can access the envelope from their account, or, if they have access to the alternate email, they can use the link in the email notification but must first sign in to their account to view the documents.
- **If the signing group does not use the alternate email address**, then notifications are sent as follows:
  - All members of a signing group receive the email notification to view and sign
  - All group members receive reminder notifications
  - When the document is finished, all group members receive the completed email notification
  - If document markup is used, all group members receive notification of changes, and any one member can review and approve for the group

## Tracking signing group activity

- **Envelope Details** - The details view lists the signing group as the recipient. Actions on the envelope by all group members are recorded. Once the envelope is completed, the identity of the actual signer is listed below the group name.

### Please DocuSign: Assessment Form2.pdf

Sent on Mar 8, 2017 | 17:17

✓ **Completed**

MOVE
MORE ▼

▼

---

#### Recipients SIGNING ORDER

✓

**Volunteers**

Signed by: Mike L. Marsh (mike.marsh@mailnesia.com)

**Signed**

on Mar 8, 2017 | 17:25

- **History** - The History reflects the activity for each group member. So, for example, when you send an envelope to a signing group, each group member is listed as being sent an invitation to view and sign.

Time	User	Action	Activity
Mar 8, 2017   17:16	Melanie E. Deschutes (Français (FRANCE)) [api:10.101.101.11]	Registered	The envelope was created by Melanie E. Deschutes
Mar 8, 2017   17:17	Melanie E. Deschutes (Français (FRANCE)) [api:10.101.101.11]	Sent Invitations	Melanie E. Deschutes sent an invitation to Melanie E. Deschutes [melanie.deschutes@gmail.com], Signing Group: Volunteers
Mar 8, 2017   17:17	Melanie E. Deschutes (Français (FRANCE)) [api:10.101.101.11]	Sent Invitations	Melanie E. Deschutes sent an invitation to Mike L. Marsh [mike.marsh@mailnesia.com], Signing Group: Volunteers
Mar 8, 2017   17:17	Melanie E. Deschutes (Français (FRANCE)) [api:10.101.101.11]	Sent Invitations	Melanie E. Deschutes sent an invitation to Greg Rich [grich@mailnesia.com], Signing Group: Volunteers
Mar 8, 2017   17:17	Melanie E. Deschutes (Français (FRANCE)) [api:10.101.101.11]	Sent Invitations	Melanie E. Deschutes sent an invitation to Abbie Newton [abbie.newton@mailnesia.com], Signing Group: Volunteers

- **Certificate of Completion** - The Certificate records both the signing group used and the name and details of the actual signer.

Signer Events	Signature	Timestamp
Mike L. Marsh mike.marsh@mailnesia.com Melanie Deschutes Properties Signing Group: Volunteers Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Accepted: Jan 24, 2017   22:18 ID: 27420d05-0b0d-4b62-b436-b333cbe4192a	<b>Completed</b>  Using IP Address: 174.46.233.194	Sent: Mar 8, 2017   17:17 Viewed: Mar 8, 2017   17:25 Signed: Mar 8, 2017   17:25

## Limitations

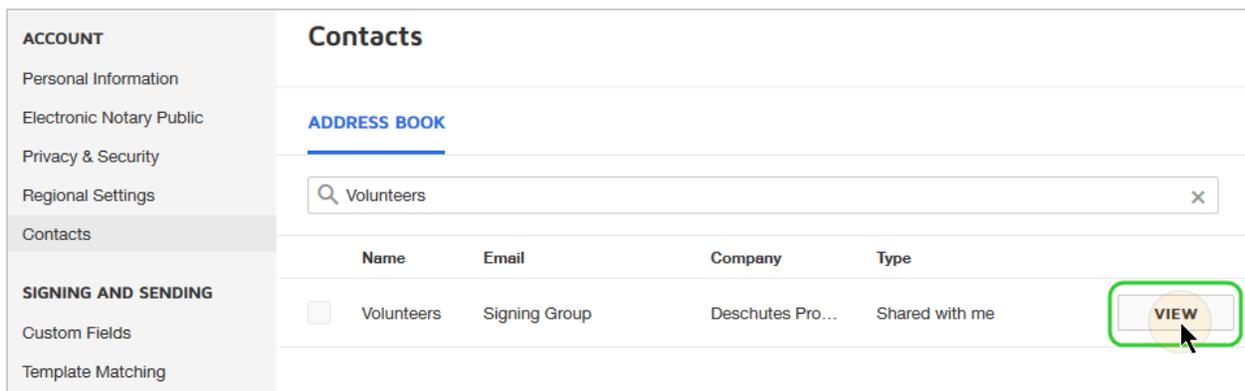
When using signing groups, you should be aware of the following limitations and restrictions:

- **In person signing.** You cannot use signing groups with in person signing, either for the host or as a hosted signer.
- **Managing groups.** Only DocuSign administrators can add, edit, or delete signing groups. [Learn more...](#)
- **New group members.** If a new member is added to a signing group, any in process envelopes to that group must be [resent](#) for the new member to gain access.
- **Recipient authentication.** Only access code authentication is available for signing groups.
- **Email address changes.** If a group member of any signing group changes his email address, your account administrator must update the group to use the new address. Otherwise, any email notifications sent to the signing group will continue to go to the old email address. If the group member is a DocuSign account holder, the envelopes

will not appear in his DocuSign account unless the group membership is updated to use the new email address.

## Viewing signing groups

You can see the signing groups available for your account in **My Preferences > Account > Contacts**. Signing groups appear in the **Address Book** category with the Email designation "Signing Group". To see a list of the members of a signing group, click **VIEW**.



The screenshot shows the DocuSign user interface. On the left is a navigation menu with sections: ACCOUNT (Personal Information, Electronic Notary Public, Privacy & Security, Regional Settings, Contacts), SIGNING AND SENDING (Custom Fields, Template Matching). The main content area is titled 'Contacts' and has a sub-section 'ADDRESS BOOK'. Below this is a search bar with 'Volunteers' entered. A table lists contacts with columns: Name, Email, Company, Type. One entry is 'Volunteers' with 'Signing Group' in the Email column, 'Deschutes Pro...' in the Company column, and 'Shared with me' in the Type column. A 'VIEW' button is located to the right of this entry, highlighted with a green box and a mouse cursor.

Name	Email	Company	Type	
Volunteers	Signing Group	Deschutes Pro...	Shared with me	<a href="#">VIEW</a>

If a signing group uses the alternate email address for notifications option (see [Notifications](#)), this detail is only visible to administrators in the DocuSign Admin application where the signing group is set up. You cannot see the alternate email information in the Contacts listing for the group.

## Setting up signing groups

Signing groups are set up for your account by your DocuSign administrator.

Administrators can refer to [this topic](#) for information on setting up and managing signing

groups.

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## Set a Signing Order

If your envelope has more than one recipient, you can choose to set a signing order. The signing order lets you control the order in which your recipients receive and sign your documents.

A convenient signing order diagram allows you to see a visual representation of how your envelope will be distributed to the recipients.

**Add Recipients**

As the sender, you automatically receive a copy of the completed documents.

IMPORT BULK LIST    ADD FROM CONTACTS

Set signing order    SIGNING ORDER

1	<input type="text" value="Frederich Lizst"/>	NEEDS TO SIGN ▼	MORE ▼
	<input type="text" value="flizst@mailnesia.com"/>		
2	<input type="text" value="Alyssa Pfeiffer"/>	NEEDS TO SIGN ▼	MORE ▼
	<input type="text" value="apfeiffer@mailinator.com"/>		

With **Set signing order** enabled, you can specify a recipient routing order. You can set up a simple sequential routing order, where each recipient receives the email notification once the previous recipient has completed their action. You can also have a mix of sequential and parallel routing.

When you use a signing order, you can route an envelope to the same person multiple times. For example, you want to send a purchase order to your manager to approve, then send it on to purchasing to sign, and finally send a copy to your manager again.

With **Set signing order** disabled, all recipients receive the document in parallel.

#### **EXAMPLE – Sequential Routing**

Let's say your independent contractor business sends Statement of Work (SOW) contracts for client approval. Your current client has two approvers: the project manager and the finance officer. You need the project manager to approve the contract before it goes to the finance officer for final approval. Once you have both approvals, you want to send a copy to your firm's accounting manager. With

Set signing order turned on, you can set up this sequential routing so that your three recipients receive and execute your document one after the other.

## To specify a signing order and view order diagram

1. From the prepare view, add your recipients.
2. Select the **Set signing order** check box.  
Signing order values appear at the left end of the recipient rows. By default, the signing order is the order in which you added the recipients.
3. To change the order, enter new values in the routing order boxes.

Set signing order

1	Frederich Lizst flizst@mailnesia.com
2	Alyssa Pfeiffer apfeiffer@mailinator.com
3	Elisabeth Schreiber schreiberlabs@gmail.com

4. To set a parallel order, such that some recipients receive the document at the same time, set the same value for the signing order.
5. To see a visual representation of the recipient routing for your document, click the signing order diagram:

### Add Recipients to the Envelope

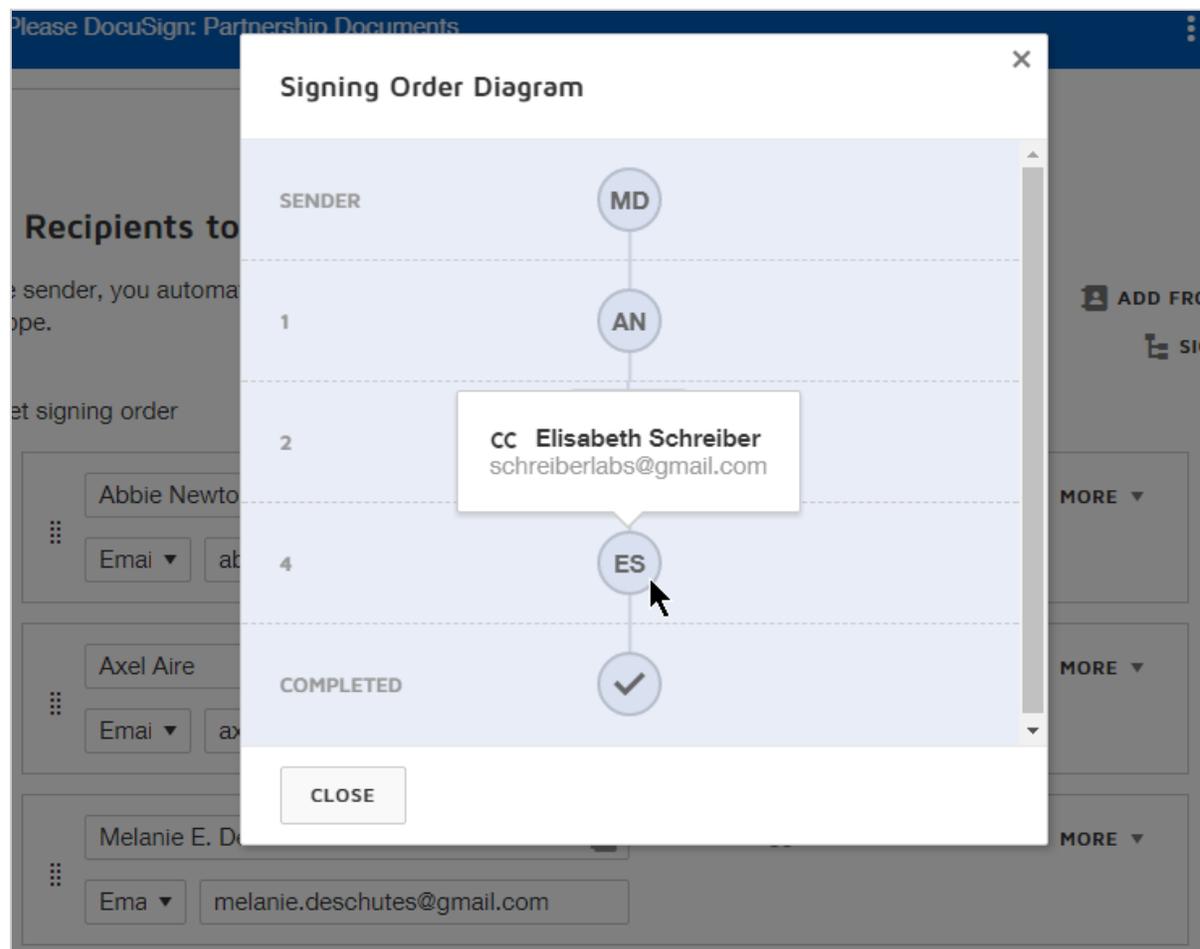
As the sender, you automatically receive a copy of the completed envelope.

[IMPORT BULK LIST](#) [ADD FROM CONTACTS](#) [SIGNING ORDER](#)

Set signing order

1	<input type="text" value="Abbie Newton"/>	NEEDS TO SIGN ▼	MORE ▼
	<input type="text" value="Email"/> <input type="text" value="abbie.newton@mailnesia.com"/>		
2	<input type="text" value="Axel Aire"/>	NEEDS TO SIGN ▼	MORE ▼
	<input type="text" value="Email"/> <input type="text" value="axelaire@mailinator.com"/>		

In the order diagram, each recipient is represented by their initials, in accordance with their position in the signing order. Hover over each recipient circle to see more details.



Once you send the envelope, the color of the recipient circles will indicate status as follows:

- **White** - recipient is next in line to sign
- **Gray** - recipients awaiting their turn to sign
- **Green** - recipient has completed signing
- **Red** - there is a problem with the recipient. Hover over the status circle for additional information, including "Auto Responded" (indicates the email notification could not be delivered to the recipient. Check email address and [correct](#) as needed);

"Declined to Sign" (includes recipient's reason for not signing); "Failed Authentication" (recipient did not pass the authentication).

## Manager Recipients

There may be situations where you as the sender may not know who the eventual signer of a document will be or you may want someone to track the envelope and make changes to the recipients information as needed. Or you may want to grant full edit rights to an envelope to someone else.

These scenarios are supported by three special manager recipient types: Specify recipient, Update recipients, and Allow to edit.

### CONTENTS

#### [Which manager recipient type to use?](#)

#### Specify Recipients:

- [When to use Specify Recipients](#)
- [Set up an envelope for Specify Recipients](#)
- [What the Specify Recipients manager sees](#)

#### Allow to Edit:

- [When to use Allow To Edit](#)
- [Set up an envelope for Allow To Edit](#)
- [What the Allow To Edit manager sees](#)

### Update Recipients:

- [When to use Update Recipients](#)
- [Set up an envelope for Update Recipients](#)
- [What the Update Recipients manager sees](#)

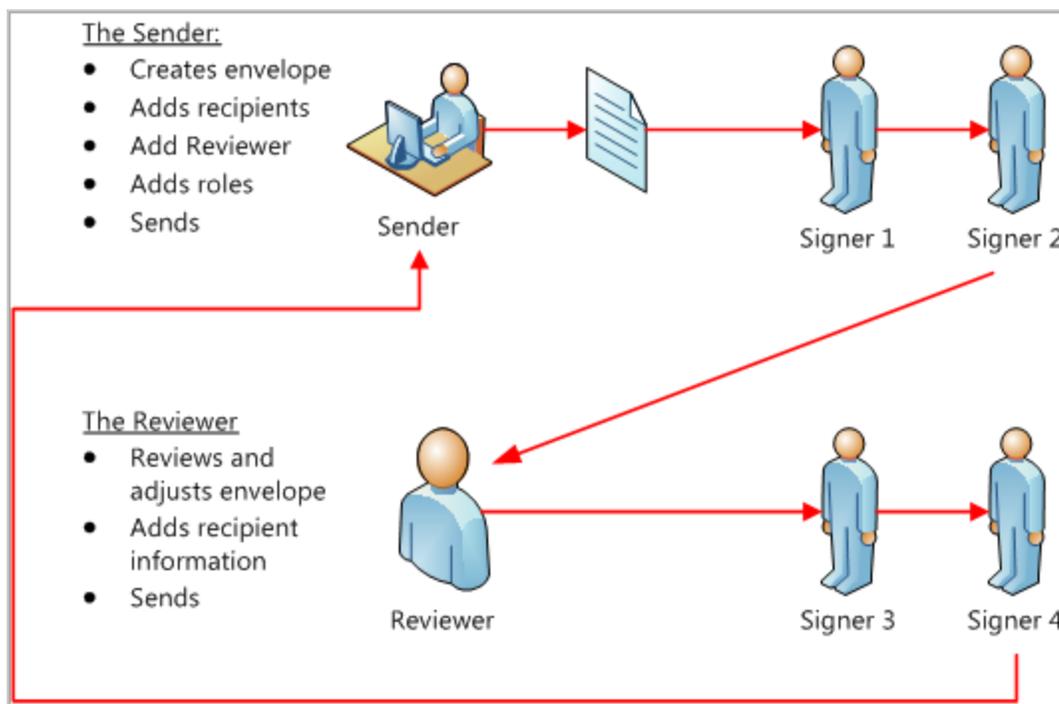
## Which manager recipient type to use?

In order to effectively use this feature, you should first identify the degree of control and responsibility you would like the manager recipient to have.

Scenario	Manager's Responsibility	DocuSign Account Required?	Manager Recipient Type
I do not know a signer's identity and I want to task someone else with providing the information after I send the envelope.	Must provide the name and email address of role recipients.	No	Specify Recipient
I want someone else to be able to add or edit recipient information.	Can review the recipients and make changes.	No	Update Recipients
I want to grant full correct rights for an envelope to another DocuSign user.	Can review the envelope and correct it to make changes to any aspect.	Yes	Allow To Edit

## When to use Specify Recipients

Specify Recipients should be used when you do not know who the eventual signers will be. This manager recipient will receive your envelope and fill in the name and email address for any role recipients. When you prepare the envelope, you add a specify recipients manager, followed by any role recipients for the manager to review and specify.



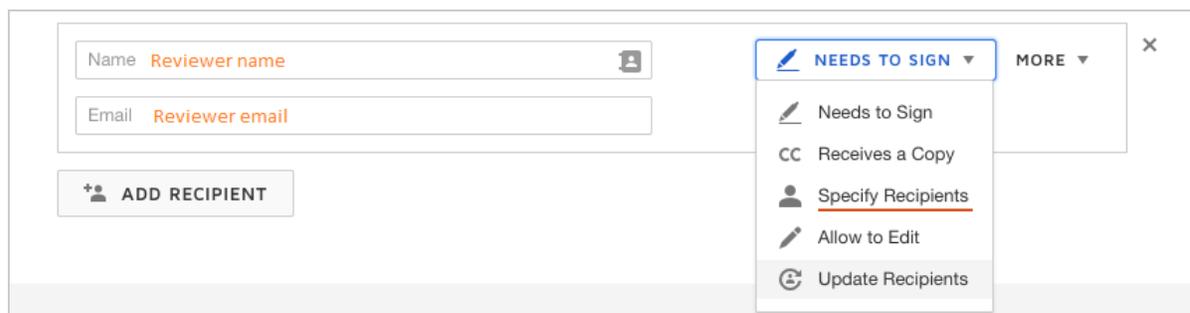
### Example — Real Estate Intent to Purchase Contract

A real estate agent for a buyer generates an Intent to Purchase contract to initiate a property sale. The Sender in the diagram above would be the buyer's agent. They prepare a document using the **Specify Recipients** option where they have a role for the seller to sign. Signer 1 and Signer 2 would be the buyer whose name

the agent already knows. The Reviewer would be the seller's agent who would add the seller's email and name. The document would then go to the seller for the final signature.

### To set up an envelope with a Specify Recipients manager

1. Follow the basic steps of setting up an envelope in the Prepare view.
2. Add the manager recipient name and email at the desired signing order position.
3. Select **Specify Recipients** from the Actions drop down.



The screenshot shows a recipient management interface. On the left, there are two input fields: 'Name' with the placeholder text 'Reviewer name' and 'Email' with the placeholder text 'Reviewer email'. Below these fields is a button labeled 'ADD RECIPIENT' with a plus icon. On the right, a dropdown menu is open, showing a list of actions: 'NEEDS TO SIGN' (highlighted in blue), 'Needs to Sign', 'CC Receives a Copy', 'Specify Recipients' (underlined), 'Allow to Edit', and 'Update Recipients'. A 'MORE' dropdown and a close 'X' button are also visible in the top right corner of the menu area.

4. Select **Add recipient** to add the role recipient.
5. Add a role name. **Do not add the signer's name or email even if they are known.** This should be done by the manager recipient when they receive your envelope to review.

The screenshot displays the 'Specify Recipients' interface in DocuSign. It is divided into two numbered sections:

- Section 1:** Contains a 'Name' field with a lock icon, an 'Email' field, and a 'SPECIFY RECIPIENTS' dropdown menu with a 'MORE' dropdown arrow.
- Section 2:** Contains a 'Role' field with the placeholder text 'Add role here (Client, buyer ,etc.)', a 'Name' field with the placeholder text 'Leave blank' and a lock icon, and an 'Email' field with the placeholder text 'Leave blank'. It also features a 'NEEDS TO SIGN' dropdown menu with a 'MORE' dropdown arrow.

6. Select the **Next** button.
7. In the Add Fields view, add any fields that the role recipient should view or act on. (The manager recipient is not assigned any fields.)
8. Click **Send**.

## What the Specify Recipients manager sees

A specify recipients manager receives an email notification to review your envelope recipients.

Upon opening the document, the manager is prompted to add recipient's name and email for any unspecified role recipients. The manager also has the option to add or edit the private message or view the document.

**You have been asked to review and add recipient information.**  
Please enter the email address and name for the associated role and select 'Complete and Send'.

Role	Email	Name	
Client	<input type="text"/>	<input type="text"/>	<a href="#">Edit Private Message</a>

[COMPLETE AND SEND](#) [Show Document](#)

Once the manager provides all of the missing recipient information, he selects **Complete and Send**. Your envelope proceeds to the next recipient in the signing order.

## When to use Allow To Edit

Allow To Edit should be used if you want to grant full correct rights for an envelope to another DocuSign user. This manager type can edit the entire envelope, using the correct mode to make changes. This manager type requires a DocuSign account, but the manager is not assigned any fields.

In addition to the manager, you can add role and named recipients, which the manager can review and edit, or you can send the envelope only to the manager. The manager can edit the envelope to add recipients and make other changes, or she can complete it as is with no changes.

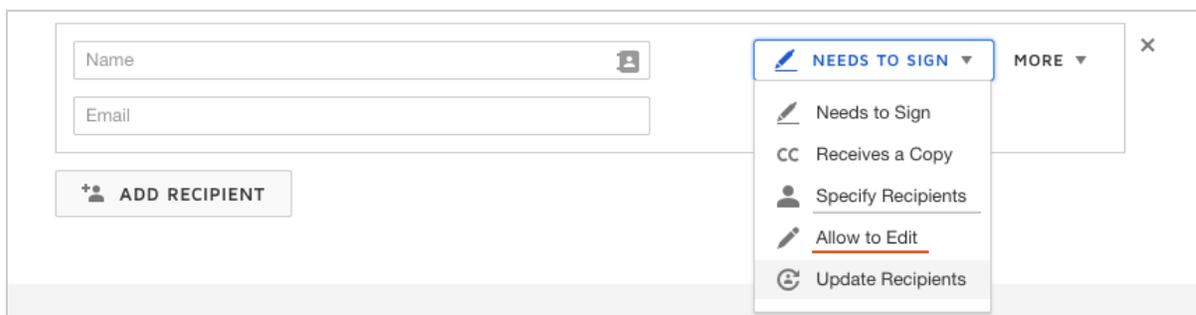
### **Example – Multiple Review Process**

A paralegal at a law firm writes up a contract for their client to sign. It requires one of the lawyers on staff to review it before it gets sent out. The paralegal adds the lawyer as a recipient (Editor) and sets the option to Allow To Edit. The lawyer opens the document from their email and selects the Edit Envelope button. This

opens the envelope in correct mode. The lawyer makes the necessary changes to the fields and recipients and then completes it where it is sent off to the client.

## To set up an envelope with an Allow to Edit manager

1. Follow the basic steps of setting up an envelope in the Prepare view.
2. Add the manager name and email at the desired signing order position.
3. Select **Allow to Edit** from the Actions drop down.



The screenshot shows a recipient management interface. On the left, there are input fields for 'Name' and 'Email', and a button labeled 'ADD RECIPIENT'. On the right, a dropdown menu is open, showing the current status as 'NEEDS TO SIGN'. The menu options are: 'Needs to Sign', 'CC Receives a Copy', 'Specify Recipients', 'Allow to Edit' (which is highlighted with a red underline), and 'Update Recipients'. A 'MORE' dropdown and a close 'X' button are also visible in the top right of the menu area.

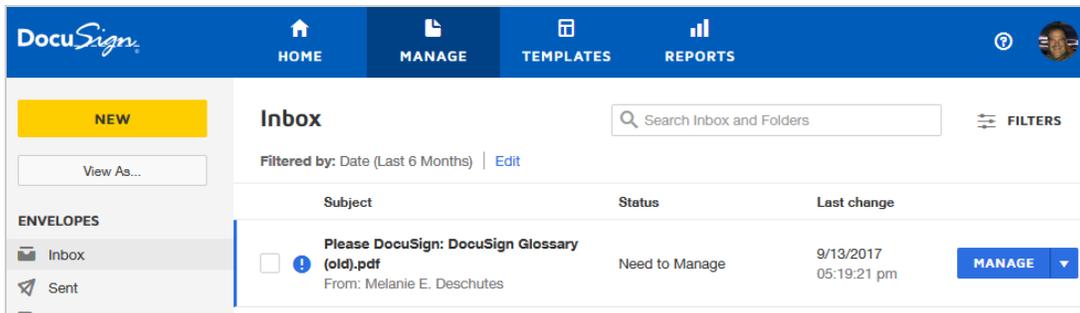
4. (Optional) Add unspecified role recipients for the Allow to Edit manager to fill in or named recipients, which the manager can review and edit.

If you do not add any other recipients, the manager will receive your envelope and can edit it to add recipients and make other envelope changes, or they can complete the envelope as is with no changes.

5. Finishing preparing your envelope as usual and send it.

## What the Allow To Edit manager sees

The Allow to Edit manager receives an email notification to review your envelope recipients, and the envelope is listed in their DocuSign Inbox with a **MANAGE** action.



The manager clicks **MANAGE** to open the envelope and is prompted to add or modify recipient name and email information for any unspecified role recipients. Once all recipient information is complete, the manager can click **Complete and Send** and the envelope proceeds to the next recipient.

**You have been asked to review and add recipient information.**  
Please enter the email address and name for the associated role and select 'Complete and Send'.

Role	Email	Name	
Client	<input type="text"/>	<input type="text"/>	<a href="#">Edit Private Message</a>

[Show Document](#)

Since an Allow to Edit manager has the same control of the envelope as the sender, they can click **Edit Envelope** and correct the recipients, signing order, fields, and other areas of

the envelope. Once the manager finishes correcting the envelope, their responsibility for the envelope is completed and it moves on to the next recipient.

## When to use Update Recipients

Update Recipients should be used when you want to set up a recipient as a reviewer of the signer information. They can specify details for role recipients and update information for named recipients.

The reviewer can modify the email, name, access code, and private message for all recipients as long as they have not already signed the document. They can also void the document. This manager type cannot add new recipients or change routing order. This manager type does not require a DocuSign account.

### **Example — Multiple owners of a document**

Two sales account managers are working to close a deal with a client. It is imperative that any changes to the signers of the contract are made quickly. Account manager Thomas adds the other account manager Susan as an Update Recipient. He then adds the three clients who need to sign. Susan tracks the document through emails and see that one of the clients has the wrong email address. She opens the document and corrects the email address. Because she was set up as an Update Recipient, she was able to make this change.

## To set up an envelope with an Update Recipients manager

1. Follow the basic steps of setting up an envelope in the Prepare view.
2. Add the Update Recipient manager's name and email address at the desired signing order position.

3. Select **Update Recipients** from the Actions drop down.

The screenshot shows a form for adding recipients. At the top left, there is a checkbox labeled "Set signing order". Below it are two input fields: "Name" and "Email". To the right of these fields is a dropdown menu currently set to "NEEDS TO SIGN". A "MORE" dropdown is also visible to the right of the main dropdown. Below the input fields is a button labeled "ADD RECIPIENT". The "NEEDS TO SIGN" dropdown menu is open, showing several options: "Needs to Sign", "CC Receives a Copy", "Specify Recipients", "Allow to Edit", and "Update Recipients". The "Update Recipients" option is highlighted with a blue underline.

4. Select **Add recipient**.

5. Add a role name. Name and email of role recipients are optional. They can be added by the update recipient at any stage.

The screenshot shows three recipient cards, numbered 1, 2, and 3. Card 1 has a "Name" field with the placeholder "Add Update Recipient Editor name" and an "Email" field with the placeholder "Add Update Recipient Editor email". Card 2 has a "Role" field with the placeholder "Recipient role", a "Name" field with the placeholder "Optional", and an "Email" field with the placeholder "Optional". Card 3 has a "Role" field with the placeholder "Recipient role", a "Name" field with the placeholder "Optional", and an "Email" field with the placeholder "Optional". Each card has a dropdown menu to its right, currently set to "NEEDS TO SIGN".

6. Finishing preparing your envelope as usual and send it.

## What the Update Recipient sees

An update recipients manager receives an email notification to review your envelope recipients.

The manager is prompted to add recipient's name and email for any unspecified role recipients. The manager also has the option to add or edit the private message or view the document.

**Review the recipient information**  
Please enter the email address and name for the associated role and select 'Complete and Send'.

Re-Send	Role	Email	Name	
<input type="checkbox"/>	signer1	<input type="text"/>	<input type="text"/>	<a href="#">Edit Private Message</a>
<input type="checkbox"/>	signer2	<input type="text"/>	<input type="text"/>	<a href="#">Edit Private Message</a>

[COMPLETE AND SEND](#)   [Void](#)   [Show Document](#)

The reviewer can void the transaction by clicking the **Void** link.

For any named recipients who have not yet signed, a check box appears under **Re-Send** . Selecting this option resends the email notification to the recipient, asking them to view and act on the envelope.

**Review the recipient information**  
Please enter the email address and name for the associated role and select 'Complete and Send'.

Re-Send	Email	Name	
<input type="checkbox"/>	<input type="text" value="fmarshall@mailinator.com"/>	<input type="text" value="Fred Marshall"/>	<a href="#">Edit Private Message</a>

**COMPLETE AND SEND**    [Void](#)    [Show Document](#)

The reviewer selects **Complete and Send** when they have completed the recipient information.

## Require Recipients to Draw Each Signature

For some transactions, you may want to require a recipient to draw their signature, rather than use a DocuSign preformatted style or upload an image, and to do so for each signature or initial field in a document. Typically, this is a required practice for certain financial or legal transactions.

**Note:** Previously, this feature was known as "Sign in Each Location"

You can set a recipient option to require they draw all signature and initials on your documents. This option is set for individual recipients, as described in the following procedure. When the recipient opens your documents to sign, as they click on each signature or initial field tag, they are prompted to draw their entry. They can only draw their script; the other options to select a preformatted style or upload an image are not present during signing.

Any recipient with the requirement to draw all signature and initials must have at least one assigned field.

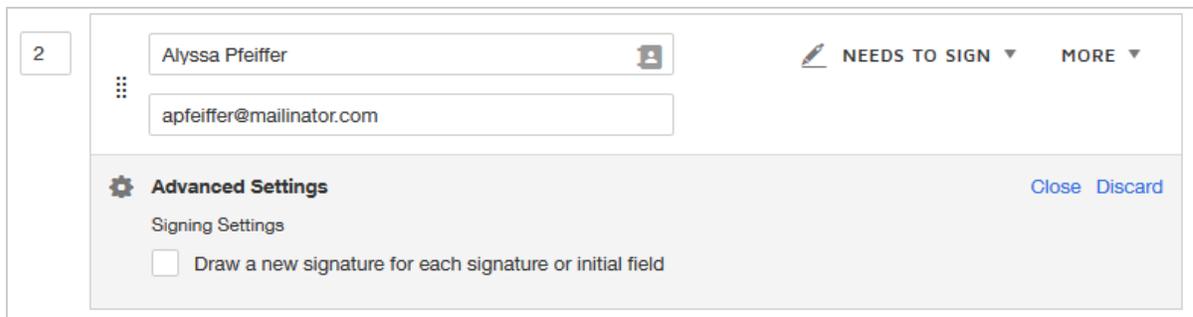
This feature must be supported by your account plan and enabled by your DocuSign administrator. Administrators enable the feature in the DocuSign Admin app, in the Sending Settings. [More info...](#)

To require a recipient to draw each signature or initial

1. From the prepare view, add the recipient.
2. Click **More** and select **Advanced Settings**:

The screenshot displays the recipient configuration interface. At the top left, there is a checkbox labeled "Set signing order". Below this, there are two input fields: the first contains "Jeff Deschutes" and the second contains "melanie.deschutes@gmail.com". To the right of these fields, there is a "NEEDS TO SIGN" dropdown menu and a "MORE" dropdown menu. The "MORE" menu is open, showing three options: "Add access authentication", "Add private message", and "Advanced settings". A mouse cursor is pointing at the "Advanced settings" option. Below the input fields, there is a button labeled "ADD RECIPIENT" with a plus icon and a person icon. In the bottom right corner, there is a small button labeled "Set recip".

3. Under Signing Settings, select the option **Draw a new signature for each signature or initial field**.



The screenshot shows a recipient card for Alyssa Pfeiffer with the email address apfeiffer@mailinator.com. The card includes a 'NEEDS TO SIGN' status and a 'MORE' dropdown menu. Below the card, an 'Advanced Settings' panel is open, showing a 'Signing Settings' section with a checkbox for 'Draw a new signature for each signature or initial field'.

4. Repeat these steps for each recipient to whom you want to apply the requirement to draw each signature.
5. Add fields for recipients as usual. You must add at least one field for any recipient to whom you apply the requirement to draw each signature.

## Add Envelope Custom Fields

With envelope custom fields, you have an additional way to categorize and identify your envelopes. Once your account administrator enables and configures envelope custom fields, you can provide field values for each envelope you send. Values can be free-text entries, or selected from a list of possible values. Envelope custom fields can be required or optional.

### **EXAMPLE—Envelope Custom Fields**

Your sales organization is divided into geographic regions. The administrator set up a required envelope custom field "Sales Region", with a predefined list of values for the five sales regions: North, South, East, West, and International. The team uses these labels to add their region to every sales contract they send

through DocuSign. The label allows your sales manager to easily locate and report on all contracts by sales region.

Field values are entered when you create an envelope, and are limited to 100 characters. You cannot edit or add values after you send an envelope. The values are visible to the sender only. As the sender of an envelope with a field value, you can see the values in the Details view. From the Manage page, you can search for envelopes by the envelope custom field values.

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

Administrators use the new administration experience to manage envelope custom fields. For administrators looking for information on how to add and manage envelope custom fields, see [this help topic](#) on the DocuSign Support site.

## To add envelope custom fields to an envelope

1. From the prepare view, once you upload at least one file to your new envelope, the **Envelope Custom Fields** section populates with whatever labels have been defined for your account by your account administrator.

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[IMPORT BULK LIST](#) [ADD FROM CONTACTS](#)  
[SIGNING ORDER](#)

Set signing order

Fred Marshall  [NEEDS TO SIGN](#) [MORE](#)

Email

[ADD RECIPIENT](#)

#### Envelope Custom Fields

\* Declined Reason

-- Select --

-- Select --

Expired

Invalid

Out of Stock

No Longer Available

Quarterly Reports  Text 1

[Advanced Options](#) | [Edit](#)

2. Complete all required custom fields; required fields are marked with a red asterisk (\*). Complete optional fields as needed. Your recipients cannot see the fields or their values.

**Previous Step:** [Add Recipients](#)

**Next Step:** [Add Messages](#)

## Add Messages

DocuSign sends the notification for your signature transaction to recipients through email. After you add recipients, you enter the email subject and message. The subject is also used for the envelope title. This title is how you identify your envelope on the Manage page and is presented to your recipients as the notification email subject.

## CONTENTS

[Add the message for all recipients](#)

[Add a private message for one recipient](#)

### Message to all recipients



The screenshot shows a form titled "Message to All Recipients". It contains two input fields: a text box with the placeholder text "Please DocuSign: Vehicle Sales Agreement.pdf" and a larger text area with the placeholder text "Enter Message".

For the message sent to all recipients, the message subject line is automatically generated from the names of the files you upload to your envelope. The subject is prefixed with "Please DocuSign:". For example, if you upload a file named "NDA Agreement", your subject line defaults to "Please DocuSign: NDA Agreement". If you upload multiple files, the file names are added to the subject line, up to the 100-character limit. You can change the subject line to anything you like.

All recipients see the message information. As the sender, you can see the message you added to a document on the [Details](#) view.

## To add a message (all recipients)

1. From the prepare view, in the Message to All Recipients section, accept the default subject line or edit as necessary. The subject line is limited to 100 characters.

**Important:** This entry is used for both your email subject, and the envelope title. A meaningful subject communicates the nature of your documents. If you send the same documents over and over, enter a custom subject line. If you use the default subject as is, the envelopes will all be titled the same, making it hard to identify a particular one.

2. Enter your message in the message field. The message field is limited to 10,000 characters.

## Add private messages to individual recipients

In addition to the general message, you can create private messages for individual recipients. Only the selected recipient sees the private message. Private message recipients see both the general message and the private message. A private message is included in the email notification under the heading **Notes** and is also visible when the recipient opens the documents to view and sign.

As the sender, you can see a private message you added to an envelope on the [Details](#) view.

## To add a private message for one recipient

1. In the recipient's row, click **More** and select **Add private message**.  
The Private Message panel opens.

2. Enter your message text and click **Close**.

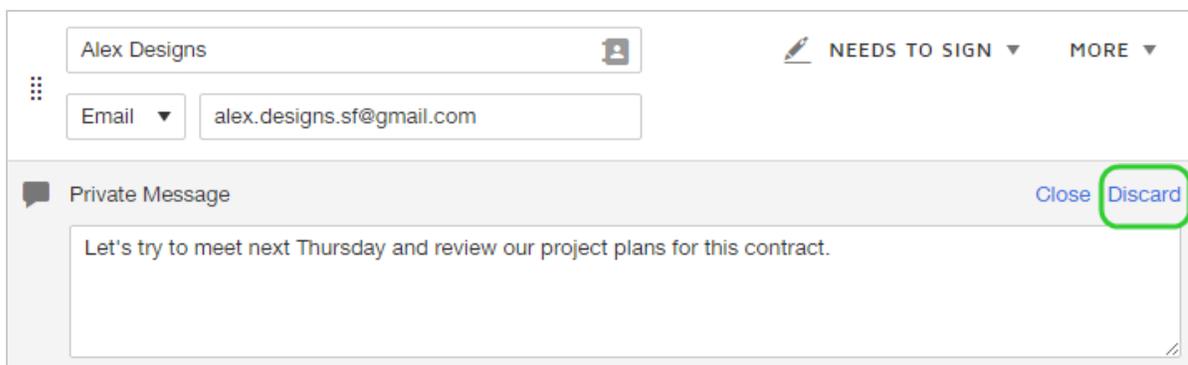
The message panel collapses and shows a private message is added for the recipient.



## To remove a private message

You can remove a private message from a draft envelope, or when [correcting](#) an in process envelope.

1. In the recipient's row, click **More** and select **Add private message**.
2. In the Private Message panel, click **Discard**.



The private message is removed.

**Previous Step:** [Add Labels](#)

**Next Step:** [Set Advanced Options](#)

## Set Recipient Language and Specify Custom Email Messages

You can specify a language setting and a custom email message for each recipient on an envelope. If you need to transact with people in different geographies or that have different language preferences, you can customize your envelope to address each person in their preferred language.

### CONTENTS

[Account settings](#)

[How it works](#)

[To set the recipient language and custom email message](#)

### Account settings for recipient language

To customize the recipient language and message, the feature must be enabled for your account by your DocuSign administrator. The setting is described in [this help guide](#) for administrators.

### How it works

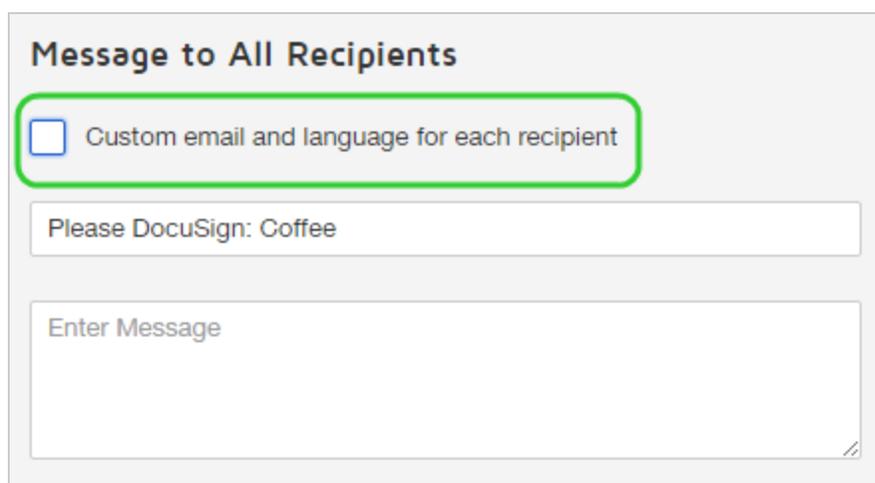
With this option, you can write a custom email message and set the language used in the standard email format and the signing view for each recipient. Email notifications present

all of the standard content in the selected language. For signing, when the recipient opens your document to sign, the menus and controls are all presented in the selected language.

The language setting does not translate the email subject or message, which you provide in the Message to All Recipients. Whatever you enter in these fields is transmitted exactly as you type it. The setting also does not have any translation effect on the files you upload for your recipients.

### To set the recipient language and a custom email message

1. Start a new envelope and prepare it as usual, adding documents and recipients.
2. In the Message to All Recipients, select **Custom email and language for each recipient**.



**Message to All Recipients**

Custom email and language for each recipient

Please DocuSign: Coffee

Enter Message

The message section expands to include a message setting for each recipient.

3. Set the language for each recipient. The language setting controls the set portions of all email notifications. The message subject and body are not translated. Whatever you enter into these two fields is transmitted exactly as entered.

4. Enter a custom message for each recipient. The text is not translated. It is sent to the recipient exactly as entered.

### Message to All Recipients

Custom email and language for each recipient

To: Melanie Deschutes

French (France) ▼

Renseignements sur les prix du café

S'il vous plaît examiner et signer dès que possible.

To: Fred Marshall

English (US) ▼

Coffee prices information

Please review and sign as soon as possible.

5. Complete and send your envelope as usual. Your recipients receive the email notification inviting them to sign in the language you selected. Example:

**Veillez examiner et signer votre document** 

**De :**  **Melanie Deschutes** ([melanie.deschutes@gmail.com](mailto:melanie.deschutes@gmail.com))  
Deschutes Properties

Bonjour Melanie Deschutes,

Melanie Deschutes vous a envoyé un nouveau document DocuSign à réviser et à signer. Veuillez cliquer sur le lien « Afficher les documents » ci-dessous pour commencer le processus de signature.

S'il vous plaît examiner et signer dès que possible.

**Afficher les documents**

Vous pouvez également accéder à ces documents en cliquant sur le lien « Accéder aux documents » du site [docusign.com](https://docusign.com), puis en spécifiant le code de sécurité :

DAF5A90A703A47688E0B4FABEF3223E01

Ce message vous a été envoyé par Melanie Deschutes qui utilise le service de signature électronique DocuSign. Si vous ne souhaitez plus recevoir d'e-mails de cet expéditeur, contactez-le pour le lui signaler.

Si vous avez besoin d'aide, veuillez contacter DocuSign Demo Support ([service@docusign.com](mailto:service@docusign.com))

6. In your account, the envelope takes the name as entered in the email subject for the first recipient listed on the envelope.

Inbox			Search Inbox and Folders
Filtered by: Date (Last 6 Months)   <a href="#">Edit</a>			
	Subject	Status	Last change
<input type="checkbox"/>	 <b>Contrat pour Marseille</b> To: Melanie E. Deschutes, Fred Marshall	Need to Sign	8/15/2017 10:35:43 pm

## Set Advanced Options

When preparing envelopes, you can set various recipient privileges, reminder settings, and expiration options. These options are, by default, controlled from the [Sending Settings](#) set for your account, where you specify settings for all of the envelopes that you send. You can override these default options at any point in the process of preparing documents for signature.

**Note:** These options apply to all recipients; you cannot specify these advanced options for a single recipient.

### To set advanced document options for an envelope

1. Create an envelope as usual, or continue a draft.
2. Open the Advanced Options for the envelope by clicking the **Edit** link by the Advanced Options details:

**Message to All Recipients**

Please DocuSign: LeadPaintDisclosure.pdf

Enter Message

**Advanced Options | Edit**

- Documents will expire 30 days after send date
- Recipients will be warned 2 day(s) before request expires

3. In the Advanced Options dialog, modify the default settings for the envelope. The available settings are described in detail below.

### Advanced Options

---

#### Recipient Privileges

- Allow recipients to sign on paper
- Allow recipients to change signing responsibility
- Allow recipients to edit
- Turn on auto navigation

---

#### Reminders

- Send automatic reminders

Number of days before sending first reminder:

Number of days between reminders:

---

#### Expiration

Number of days before request expires:  Request will be scheduled for expiration on **2017 August 3 | 13:49**

Number of days in which to warn signers before expiration:

---

#### Sender Settings

- Affix envelope ID to top left of every document page

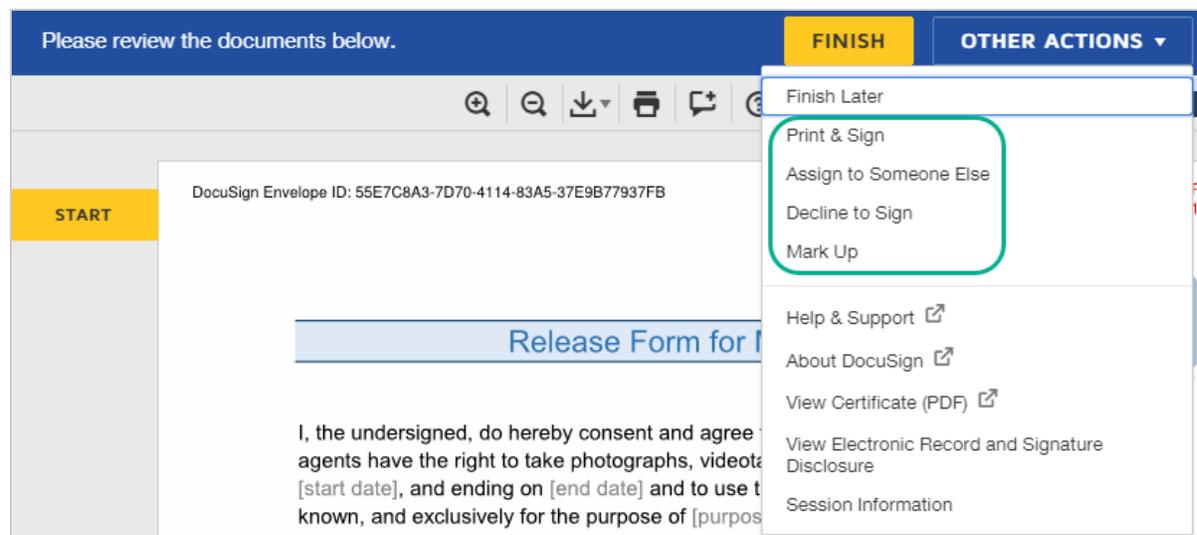
---

#### Branding

Signing for HR  Colors:

---

For the Recipient Privileges you select, signers will see additional options in the **OTHER ACTIONS** menu:



## Allow recipients to sign on paper

(Default: On)

Sometimes, signers prefer to sign a document using pen on paper. The Sign on Paper feature allows signers to sign documents on paper, while still allowing you to take advantage of DocuSign's ability to store and manage documents electronically.

When a recipient receives the document, they select the **Print & Sign** option. From there, the signer prints and signs the document. The recipient can choose to submit the completed document by fax, or by scanning it and uploading the file.

## Allow recipients to change signing responsibility

(Default: Off)

This option gives recipients the option to assign signing responsibility to another person.

When a recipient receives the document, they select the **Assign to Someone Else** option. The recipient provides the new signer's contact information, and the document is reassigned. In the document, field tags for the original recipient are reassigned to the new signer. The new signer receives a signing notification, which includes a message from the original signer if they opted to include one. The sender receives a change in signer notification. The original signer is added as a carbon copy recipient.

Once the document completes, the [Certificate of Completion](#) reflects the details of the signing event. The new signer is shown in the Signer Events section, and the original recipient is listed under Carbon Copy Events.

## Allow recipients to edit the document

(Default: Off)

This option allows recipients to make changes to the document with the document markup feature. If a recipient selects **Markup Document** and makes a change, all signers on the document must initial their approval of these changes, and a full audit trail is maintained in DocuSign. [Learn more...](#)

## Turn on auto navigation

(Default: On)

This option allows the sender to turn off the auto navigation setting specified for the account by the DocuSign administrator. Auto navigation controls how the fields are presented to the recipient when signing a document. To find out which auto navigation setting is specified for your account, check with your DocuSign administrator.

If auto navigation is turned off, then the recipient must navigate to fields manually; they are not prompted to complete fields. Recipients can scroll to locate their fields, or use the Tab key to step through fields. Even with auto navigation turned off, all required fields must be completed in order to finish signing the document.

## Reminders

(Default: Off)

You can turn on reminders to send follow up emails to signers automatically. When you enable reminders, you specify when and how often to send notifications.

**Note:** To send a manual reminder for an in process envelope, use the [resend envelope](#) feature.

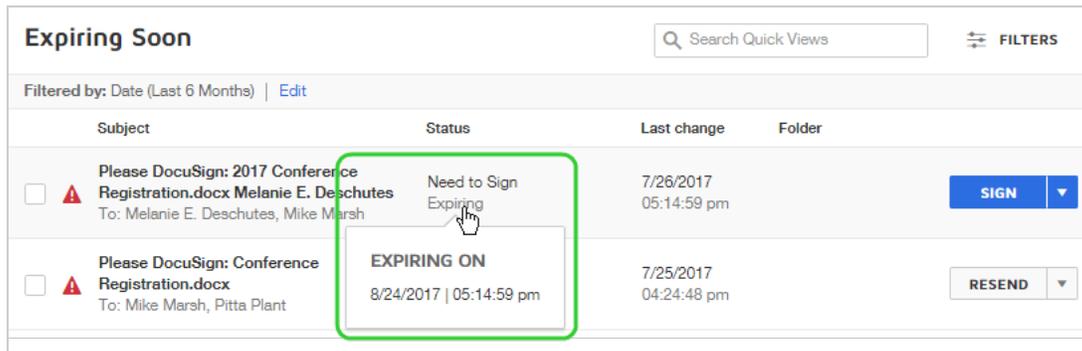
## Expiration

(Default: 120 days; no warning)

By default, envelopes expire 120 days after sending. When an envelope expires, the status changes to Voided and it can no longer be viewed or signed by recipients.

You can modify the default number of days before the envelope expires. The date and time shown is when the envelope enters the expiration process. Envelopes can take up to 24 hours from this time to expire. You can also add the option to send signers an expiration warning, which generates an expiration pending email to all outstanding signers.

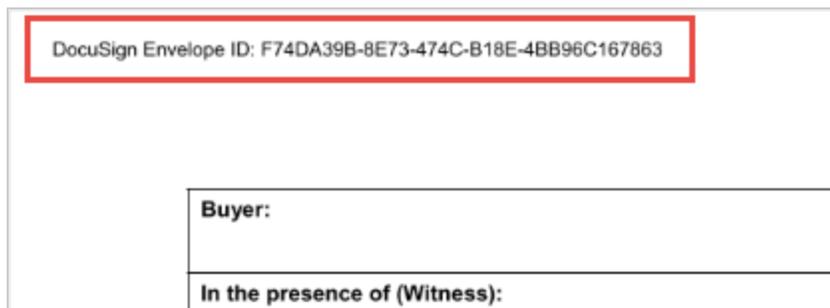
When an in process envelope reaches **six days to expiration**, a warning icon appears and the status shows "Expiring". Hover over the status to show the expiration date.



	Subject	Status	Last change	Folder
<input type="checkbox"/>	<b>Please DocuSign: 2017 Conference Registration.docx</b> Melanie E. Deschutes To: Melanie E. Deschutes, Mike Marsh	Need to Sign Expiring	7/26/2017 05:14:59 pm	<b>SIGN</b> ▼
<input type="checkbox"/>	<b>Please DocuSign: Conference Registration.docx</b> To: Mike Marsh, Pitta Plant	<b>EXPIRING ON</b> 8/24/2017   05:14:59 pm	7/25/2017 04:24:48 pm	<b>RESEND</b> ▼

## Sender Settings

If enabled for your account, you can choose whether or not to automatically **Stamp documents with envelope ID**. This stamp appears at the top left of every page in your document.



DocuSign Envelope ID: F74DA39B-8E73-474C-B18E-4BB96C167863

**Buyer:**

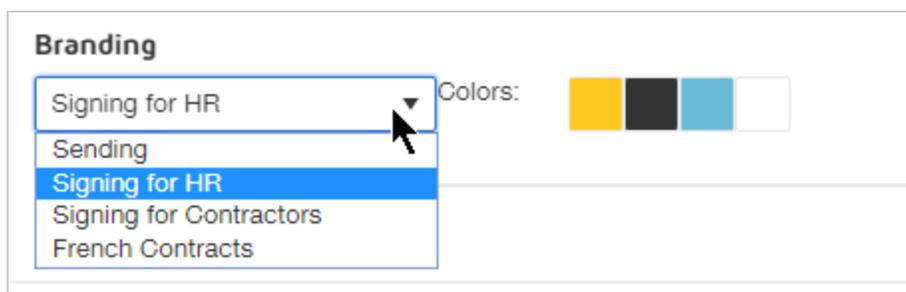
**In the presence of (Witness):**

This automatic stamp cannot be repositioned. Furthermore, the envelope ID becomes a permanent part of your document and cannot be removed.

If you want the ID on the document but prefer it in a different location, disable this setting and instead use the Envelope ID field to place the ID exactly where you want it to appear. See [Control Envelope ID Placement](#) for more information.

## Branding

If your account has configured custom signing brands, these brands are available for you to select and apply to your envelope.



With a custom signing brand, you can configure certain elements of the recipients' experience. These customizations include the logo and certain color elements in the email notifications and in what recipients see when they sign documents sent from your account. A signing brand may also include custom destination URLs, links, and resource files. See [Configure Brands](#) for more information on how administrators can create custom brands.

**Previous Step:** [Add Messages](#)

**Next Step:** [Add Fields to Document](#)

## Document Markup

Document markup is an [advanced sending option](#) that you can enable for any envelope, adding the ability to negotiate changes to documents from within the DocuSign workflow.

### CONTENTS

[About document markup](#)

[How to enable document markup on an envelope](#)

[Document markup and collaborative fields](#)

[How recipients use document markup](#)

[Related topics](#)

### About document markup

With document markup, you can allow recipients to make changes to your documents by covering up existing text and adding new text. Recipients can choose to use a special markup text field, which they can place anywhere on the documents, scale it and, if desired, fill it in. All changes must be reviewed and approved by all signers.

All markup changes and approvals are covered by the certified audit trail, with a detailed account of all changes recorded in the envelope history.

Oct 2, 2014 02:17 PT	Fiona Descartes (English (US)) [web:174.46.233.200]	Document Markup	TAB1 tab added in Document:[Sales Quote.xlsx] on Page:[1] with value [Delivery must be between the hours of 10 am and 4 pm. Signature is required. Unattended delivery will be returned as refused. ] 	Delivered
-------------------------------	---	--------------------	---	-----------

Email notifications highlight markup changes for all recipients and documents with markup applied are automatically rerouted to all recipients for approval of the changes.

#### **EXAMPLE – Changing the Duration of an NDA**

Your investment firm receives an NDA from the founder of a startup company who would like your financial backing. The NDA specifies an 18 month nondisclosure period, which is too restrictive. You use the markup feature to edit the period to a more reasonable six months. The document is returned to the founder through DocuSign, and she approves your change, completing the NDA.

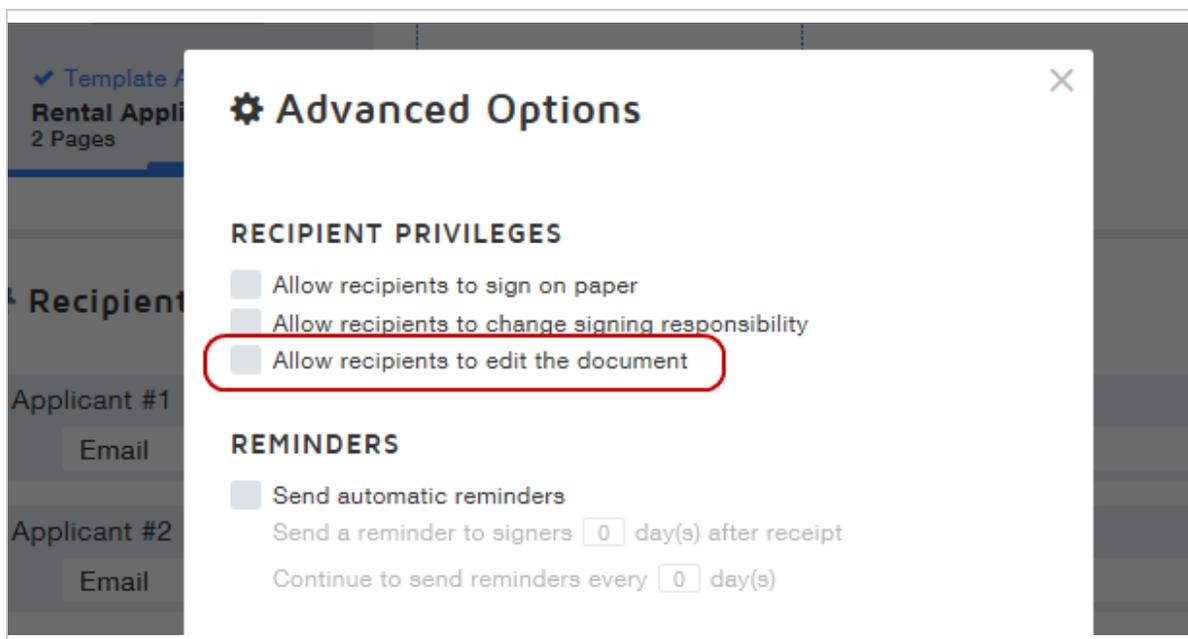
Document markup is enabled and managed by your DocuSign administrator. If your account administrator has enabled document markup for you, you can include the option for any document you send. See the [Signing Settings](#) guide for more information on how administrators enable document markup (Allow recipients to edit documents).

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## How to enable document markup on an envelope

You can enable the document markup option for any envelope you send.

1. As you set up your envelope, open the Advanced Options and enable the setting **Allow recipients to edit the document**.



**Note:** If you do not see this option listed, check with your DocuSign administrator.

2. Finish setting up your document as usual, and send it.

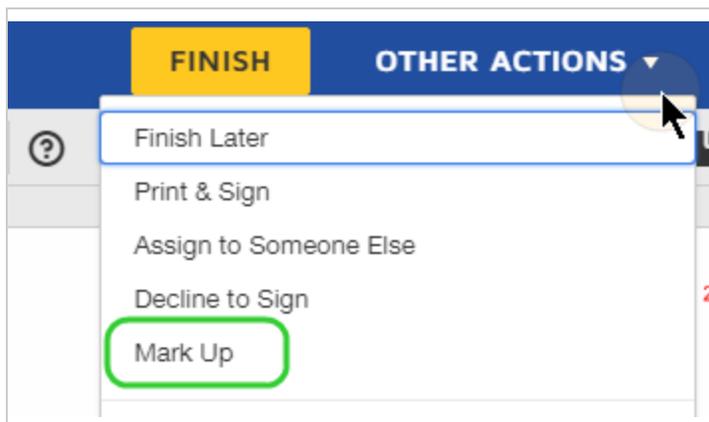
## Document markup and collaborative fields

An important aspect of document markup is the effect the setting has on any fields in the document that are valid for collaboration. Normally, fields are only visible and actionable by the recipient to whom they are assigned. For text, radio button, drop down, and check box fields, you can choose to set the collaboration property, which makes the fields visible and actionable by all recipients on the transaction. If you use document markup, these field types become collaborative automatically when the markup feature is activated by a recipient.

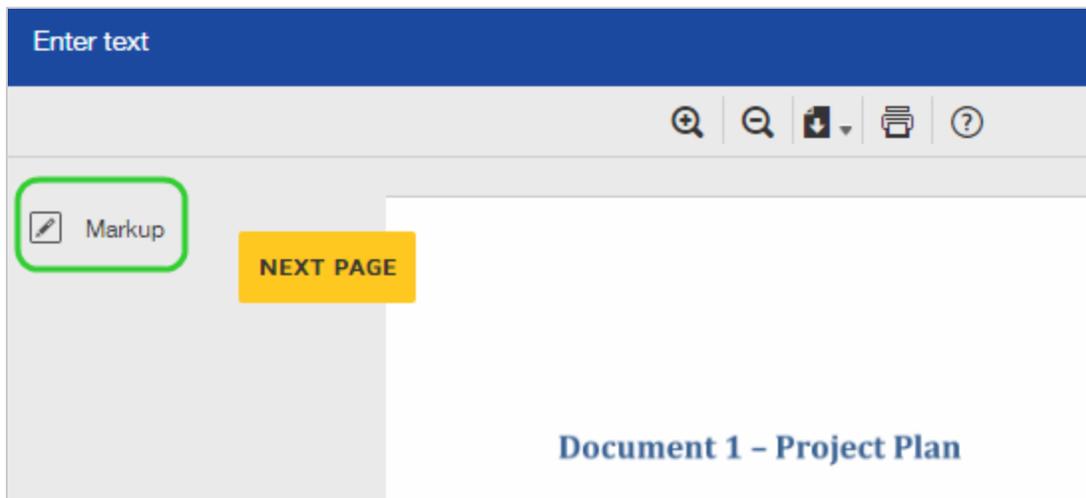
**For information on field collaboration:** [Collaborative Fields](#)

### How recipients use document markup

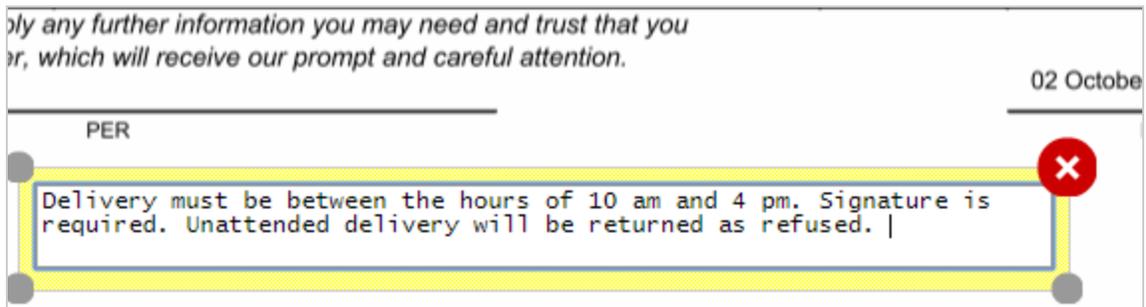
1. With document markup enabled, recipients see a **Mark Up** option in the **OTHER ACTIONS** menu.



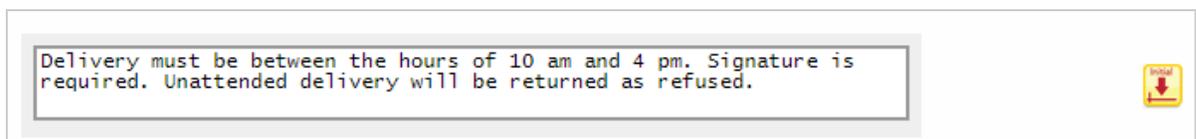
2. A special Markup field appears, which the recipient can drag and place anywhere on the document.



3. (Optional) The recipient can enter information into the markup field.



An Initial tag appears at the margin to the right of the field, which the recipient must sign to complete their markup action.



- Recipients who have already signed the document receive an email notification to review the suggested changes. When they view the document, they are guided to initial the changes.

Initial

Delivery must be between the hours of 10:00 am and 4:00 pm. Signature is required. An unattended delivery will be returned as refused.



Recipients can accept the change by initialing it, or edit the change and initial their version. The review process continues until all recipients have initialed all changes.

- Once all changes are initialed, the document is complete and a completed email notification is sent to all recipients. The notification includes details of the markup changes.
- The final document includes all completed fields, including the markup changes and corresponding initials.

ITEM	QUANTITY	DESCRIPTION	UNIT PRICE	DELIVERY DATE
1	15	Key Mark Drill Bits	255.00	11/20/2014
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

We will be happy to supply any further information you may need and trust that you call on us to fill your order, which will receive our prompt and careful attention.

PER

DATE

Delivery must be between the hours of 10:00 am and 4:00 pm. Signature is required. An unattended delivery will be returned as refused.

DocuSigned by:

Gina Descartes

17DA70000BP4433...

02 October 2014 | 12:11 PM PT



7. The History reflects the Document Markup activity, and includes the added text.

Oct 2, 2014 02:17 PT	Fiona Descartes (English (US)) [web:174.46.233.200]	Document Markup	TAB1 tab added in Document:[Sales Quote.xlsx] on Page:[1] with value [Delivery must be between the hours of 10 am and 4 pm. Signature is required. Unattended delivery will be returned as refused. ] 	Delivered
-------------------------------	---	--------------------	---	-----------

## Related topics

- [Strikethrough text for Real Estate](#). For Real Estate plans only, DocuSign offers a Line markup tool enabling real estate senders to strike through text and clauses on standard agreements within DocuSign. This is an alternative to document markup. With this markup tool, the sender can draw lines through areas on documents before sending them to recipients.

## Control Envelope ID Placement

The Envelope ID is a long, unique identifier generated for each envelope by the DocuSign system. When you send an envelope, you can control whether or not the ID is included on documents, and where and how it appears. Regardless of whether the Envelope ID is stamped on your documents, it is always recorded in the envelope [History](#).

### CONTENTS

[How it works](#)

[Automatically stamp the Envelope ID on documents](#)

[Manually place the Envelope ID stamp on documents](#)

---

## Send a document without the Envelope ID stamp

### How it works

If you choose to add the ID to your document, the ID is seen by all recipients and becomes a permanent part of the document and cannot be removed.

For the Envelope ID, you have the following options:

- Automatically stamp the ID at the top-left of every page in your document
- Manually place the ID where you want it to appear, and set the font and other formatting properties
- Send a document without the ID appearing anywhere on it

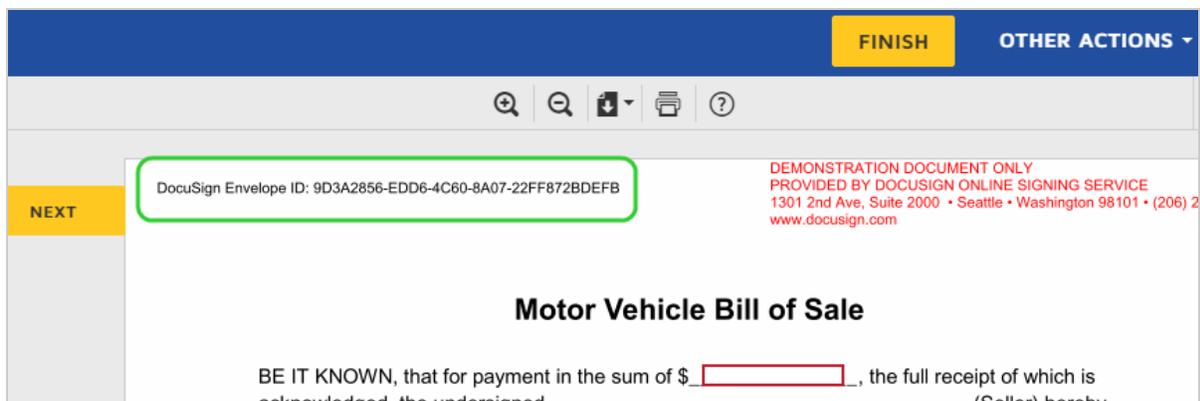
To include the Envelope ID on documents, the feature must be enabled for your account by your DocuSign administrator in the [Sending Settings](#).

### To automatically stamp every page with the Envelope ID

1. Start a new envelope and add documents and recipients as usual.
2. Open the Advanced Options by clicking the **Edit** link.
3. Under Sending Settings, select the option **Stamp envelope ID onto top left of every page**.
4. Send your envelope.

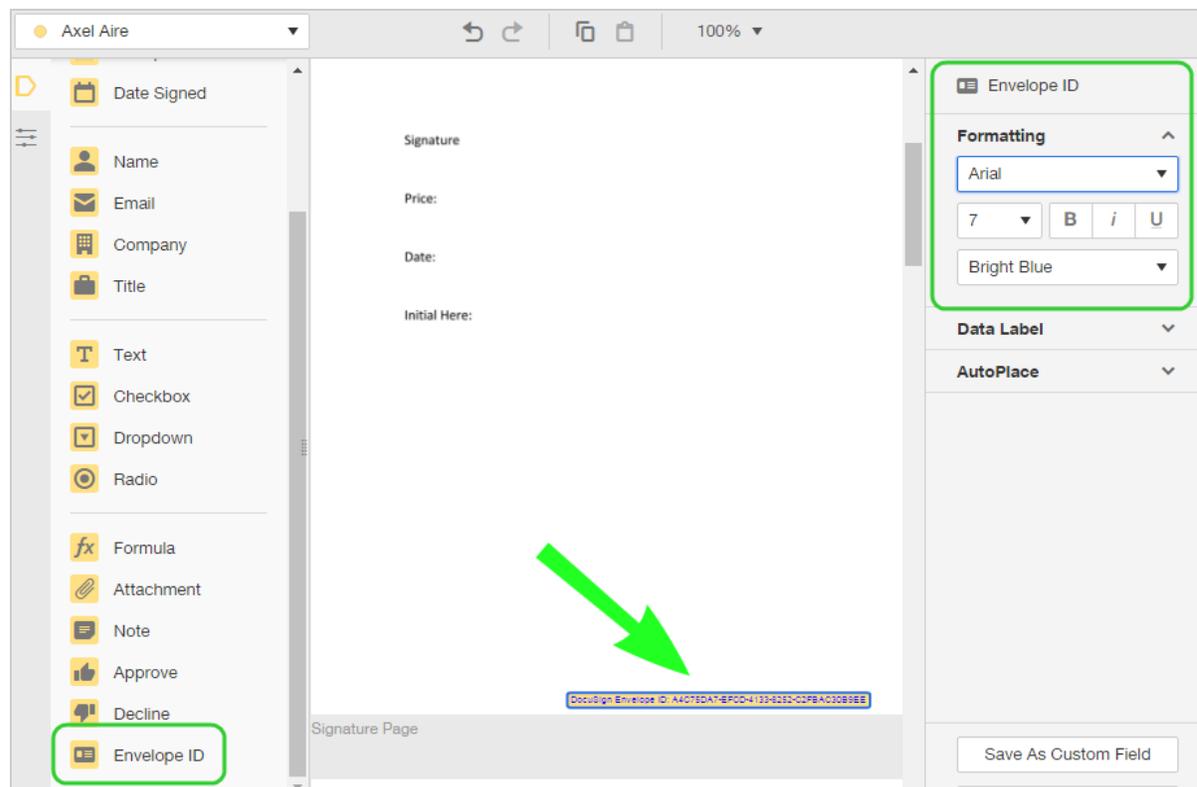
When any recipient opens the document, the Envelope ID appears at the top left of

every page.



To manually place and format the Envelope ID on a document

1. Start a new envelope and add documents and recipients as usual.
2. Open the Advanced Options by clicking the **Edit** link.
3. Under Sending Settings, clear the option **Stamp envelope ID onto top left of every page**.
4. Continue to the Add Fields view.
5. Select the Envelope ID field in the list of Standard Fields and then place it at the desired location in your document. It does not matter which recipient you assign the field to; all recipients will see the ID when they view or print the document.
6. (Optional) To adjust the appearance of the field, select it, and then expand the Formatting properties and set the font, font size, and other characteristics.



## 7. Send the envelope.

When any recipient opens the document, the Envelope ID appears only where you placed it.

To send a document without the Envelope ID on it

1. Start a new envelope and add documents and recipients as usual.
2. Open the Advanced Options by clicking the **Edit** link.
3. Under Sending Settings, clear the option **Stamp envelope ID onto top left of every page**.
4. Continue to the Add Fields view and add fields as usual, but do not add the Envelope ID field to the document.

## Advanced Options: Disabling Comments on an Envelope

If comments are enabled on your account and you would like to prevent recipients from commenting on documents in an envelope you're sending, you can:

- disable comments in the envelope before you send it
- correct an envelope in progress to disable comments

### To disable comments on an envelope before you send it or when correcting it

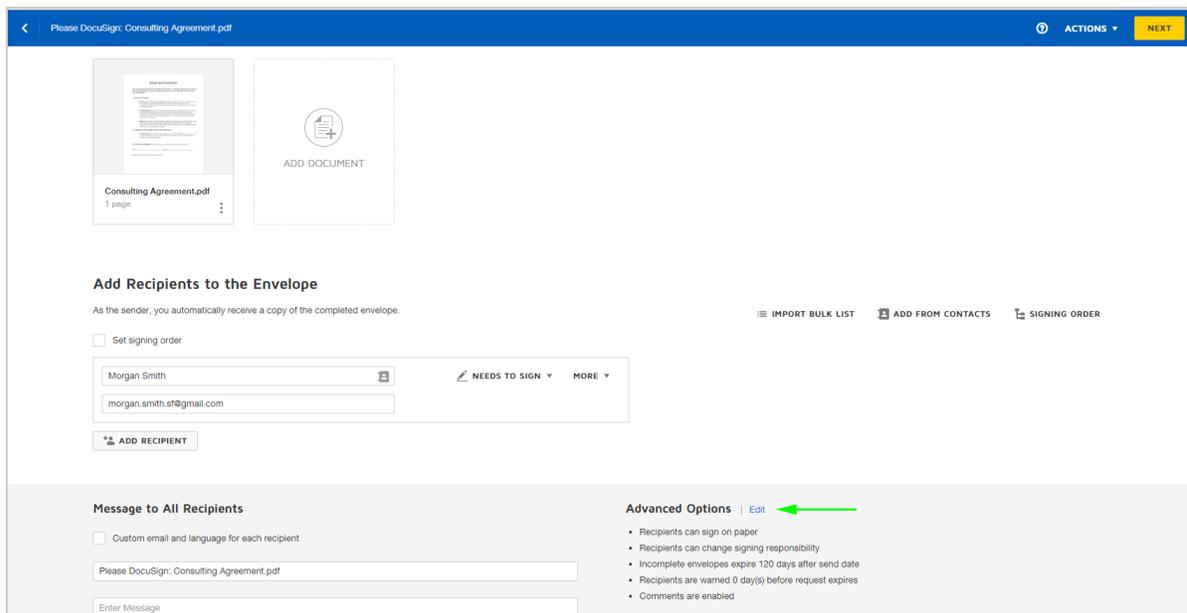
You can disable comments in an envelope by changing Advanced Options that are available to you when adding or changing documents and recipients in an envelope.

#### 1. Under Advanced Options:

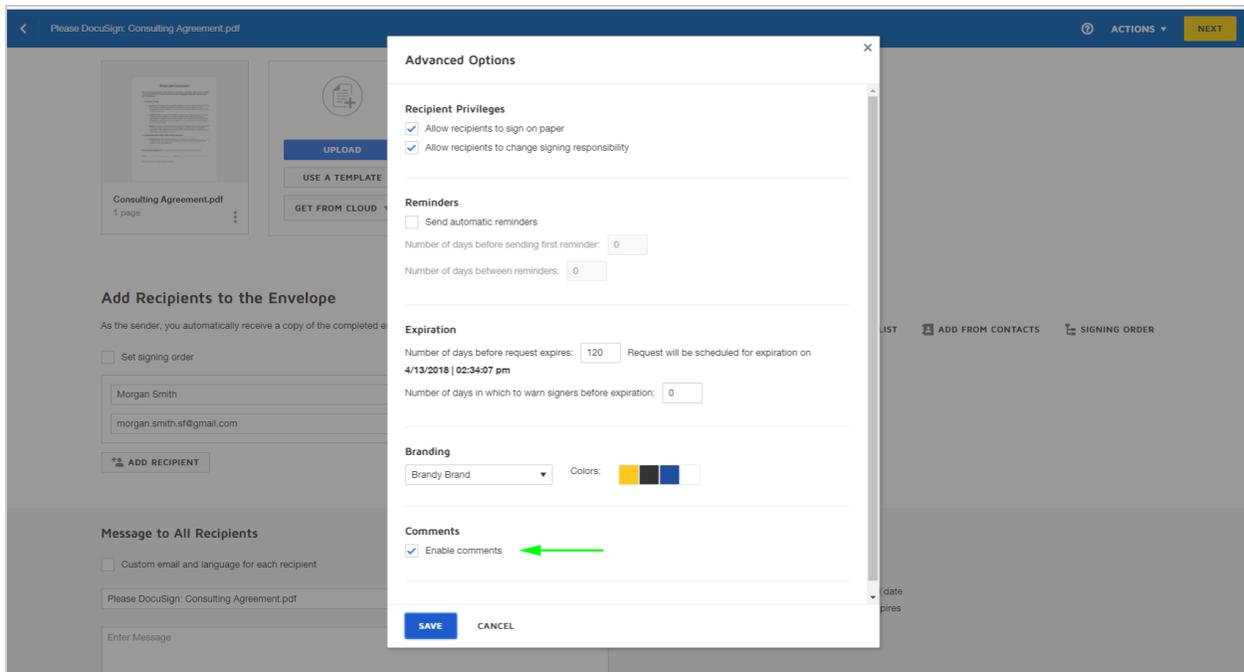
If you do not see *Comments are enabled*, comments are not enabled on your account and will not be available to the recipients of the envelope.

The screenshot shows the DocuSign envelope creation interface. At the top, there is a blue header with a back arrow, the text "Please DocuSign: Consulting Agreement.pdf", a help icon, "ACTIONS", and a yellow "NEXT" button. Below the header, there is a document preview area with a thumbnail of "Consulting Agreement.pdf" (1 page) and an "ADD DOCUMENT" button. The main section is titled "Add Recipients to the Envelope" and includes a note: "As the sender, you automatically receive a copy of the completed envelope." There are three buttons: "IMPORT BULK LIST", "ADD FROM CONTACTS", and "SIGNING ORDER". A checkbox for "Set signing order" is present. Below that, there is a recipient entry form with "Morgan Smith" and "morgan.smith.st@gmail.com" entered, and buttons for "NEEDS TO SIGN" and "MORE". An "ADD RECIPIENT" button is also visible. At the bottom, there is a "Message to All Recipients" section with a checkbox for "Custom email and language for each recipient", a text field containing "Please DocuSign: Consulting Agreement.pdf", and a field for "Enter Message". To the right of this section is the "Advanced Options" section, which is currently expanded. It lists several options: "Recipients can sign on paper", "Recipients can change signing responsibility", "Incomplete envelopes expire 120 days after send date", "Dispositions expire 180 days before request expires", and "Comments are enabled". The "Comments are enabled" option is circled in green.

If you see *Comments are enabled*, click Edit.



2. On Advanced Options, under Comments, deselect **Enable Comments**, then click **SAVE**.



## Related Topics

- **Admin settings** (admin privileges required): See [Comments Settings](#).
- **User preferences:** See [Changing the Frequency of Comment Notifications](#).

## Add Fields to Documents

Once your envelope includes files, recipients, and messages, you add the fields that instruct your signers to provide their signature, initials, or other information. You add a unique set of signing fields for each recipient.

## CONTENTS

[Overview on adding fields](#)

[How to add fields to a document](#)

[How to align fields](#)

[Using shortcut keys](#)

[Related topics](#)

**Note:** If you find you cannot add fields to the documents and templates you create, most likely this is because of your user permission profile. Contact your DocuSign administrator and ask to adjust your permission settings. These settings are documented in [this administrator help guide](#).

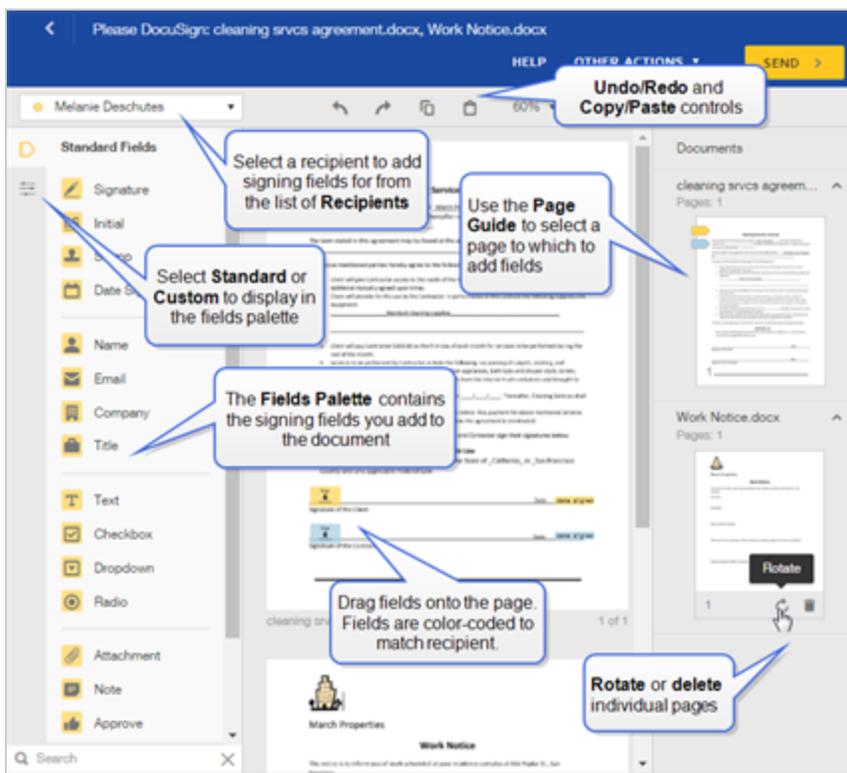
## Overview on adding fields

The Add Fields view has the following basic areas:

- **Recipients.** Lists all of the recipients who will receive your documents to sign. The fields you add apply only to the selected recipient and are color-coded to match the recipient's assigned color. You can add fields for the recipients you designate as signers. Use the **Edit Recipients** option in the recipient list to edit details, or add or remove recipients.
- **Undo/Redo and Copy/Paste.** Icons for one-click access to these common field actions. Standard keyboard controls are also supported, as well as a right-click context menu for easy field management.
- **Standard Fields.** Displays the set of standard fields you can add to your document. Select **Custom Fields** to use, add, or edit your custom fields.
- **Page Guide.** Contains a scrolling list of all of the pages in your document. This list includes all of the pages of all of the files you added to the document. Click on any page

in the Page Guide to make it the active page of your document. From the Page Guide, you can also delete and rotate individual pages from your documents and use **Other Actions > Edit Documents** to add, remove, or reorder documents.

- **Field Properties.** (Not shown) Contains the properties for a selected field or fields, allowing you to edit things like formatting, recipient assignment, and tool tips. This panel slides in over the Page Guide when one or more fields are selected.

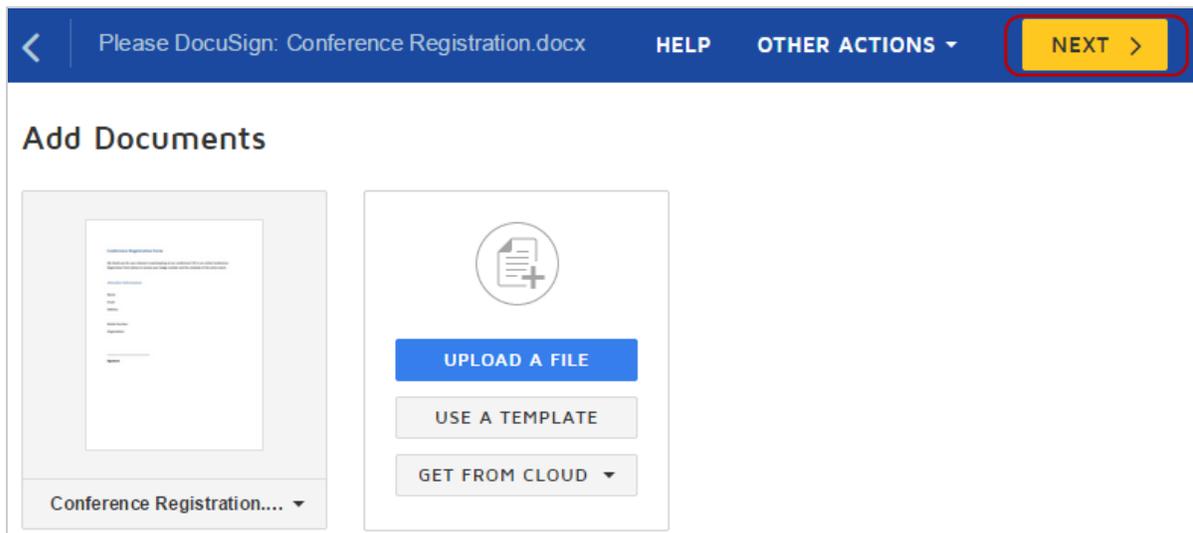


When recipients review your document, they navigate through the fields based on the Auto-Navigation setting for your account. Your DocuSign administrator [sets this option using the DocuSign Admin view](#). The default behavior is to navigate through all fields on the document. Alternate navigation options include Page only, where recipients scroll through documents manually, and Navigate Required Fields, which steps recipients through just

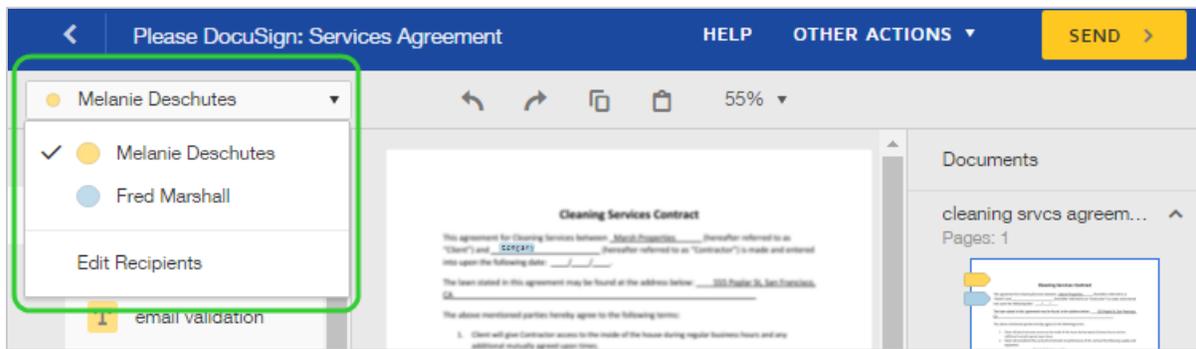
the fields marked as required. If you use Radio Buttons on your documents, the options to navigate *blank required fields* are recommended for a smoother signing experience.

## To add fields to a document

1. Start a new envelope and add documents and recipients as usual, and then click **Next**.



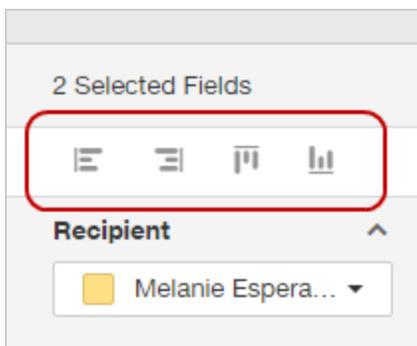
2. In the recipients list at the top of the page, select a person to add fields for.  
**Note:** The fields you add apply only to the selected recipient and are color-coded to match the recipient's color. You can only add fields for the recipients you designated as signers.



3. In the page guide at right, select a page you want to tag with fields.  
The selected page becomes the active page and displays in the center panel.
4. From the Fields palette at left, click and drag one of the available field types to add it to the active page.
5. To adjust the look, the assigned recipient, or other characteristics of a field, click the field. The Field Properties panel slides in over the page guide. Set the properties as desired.
6. Use the page guide to scroll through the pages and add more fields for your recipient.

### To align fields

- Select two or more fields (**SHIFT+Click** or click and drag), and use the alignment tools in the Field Properties panel.



## Using shortcut keys

There are several shortcut keys available in the Add Fields view. These shortcuts provide an alternative to mouse control to perform common actions on your recipient fields. Here are a few of the most commonly used shortcuts. See the [Shortcut Keys guide](#) for a complete list:

- **Change recipient:** Ctrl+Shift+. or Ctrl+Shift+,
- **Select all fields on the current page:** Ctrl+G
- **Select all fields on all pages:** Ctrl+A

## Related topics

For more information on topics related to adding fields, see the following:

- [Shortcut Keys](#). Use keyboard commands for common actions on recipient fields.
- [AutoPlace fields](#). Use AutoPlace to add fields automatically by matching to characters in your document.
- [Resize fields](#). To adjust the size of a field, click and drag on any field corner.

- [Field types](#). Use the right field type for the information you want from recipients.
- [Field properties](#). Control the appearance and behavior of fields through the available field properties.
- [Sender permission field properties for templates](#). Protect the fields you add to your template from being changed or deleted.

**Previous Step:** [Set Advanced Options](#)

**Next Step:** [Send Your Document](#)

## Shortcut Keys for Fields

There are several shortcut keys available in the Add Fields view. These shortcuts provide an alternative to mouse control to perform common actions on your recipient fields. With these keyboard commands, you can do things like change the recipient assigned to a field, tab through fields, select all fields on a page, and move fields.

### CONTENTS

[List of shortcut keys](#)

[How to see the list of shortcut keys](#)

## Shortcut keys list

### Shortcut Keys ✕

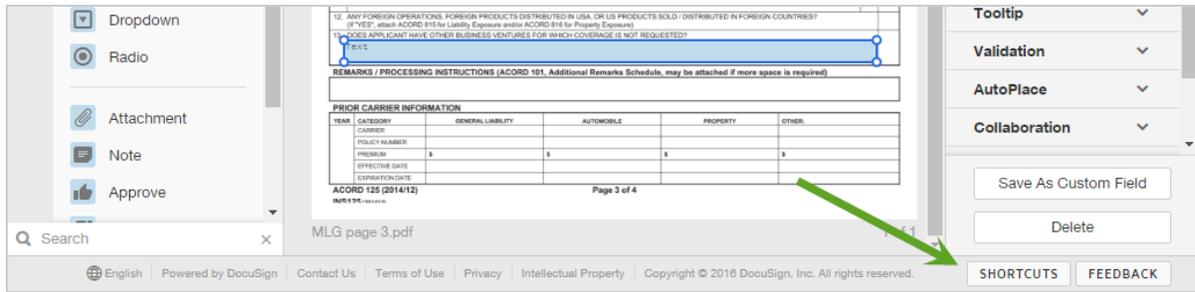
Use shortcut keys as an alternative to mouse control to perform common actions on recipient fields.

Change Recipient ⓘ	Ctrl+Shift+,, Ctrl+Shift+.	Redo	Ctrl+Y
Cut	Ctrl+X	Select all	Ctrl+A
Select tags on current page	Ctrl+G	Copy	Ctrl+C
Save	Ctrl+S	Paste	Ctrl+V
Cancel	Esc	Delete	Delete
Search placed fields	Ctrl+Shift+S	Duplicate	Ctrl+D
Add Field	Enter	Tab forward through fields	Tab
Tab backward through fields	Shift+Tab	Move ⓘ	Left, Right, Up, Down
Undo	Ctrl+Z	Focus on Properties Panel	Ctrl+E

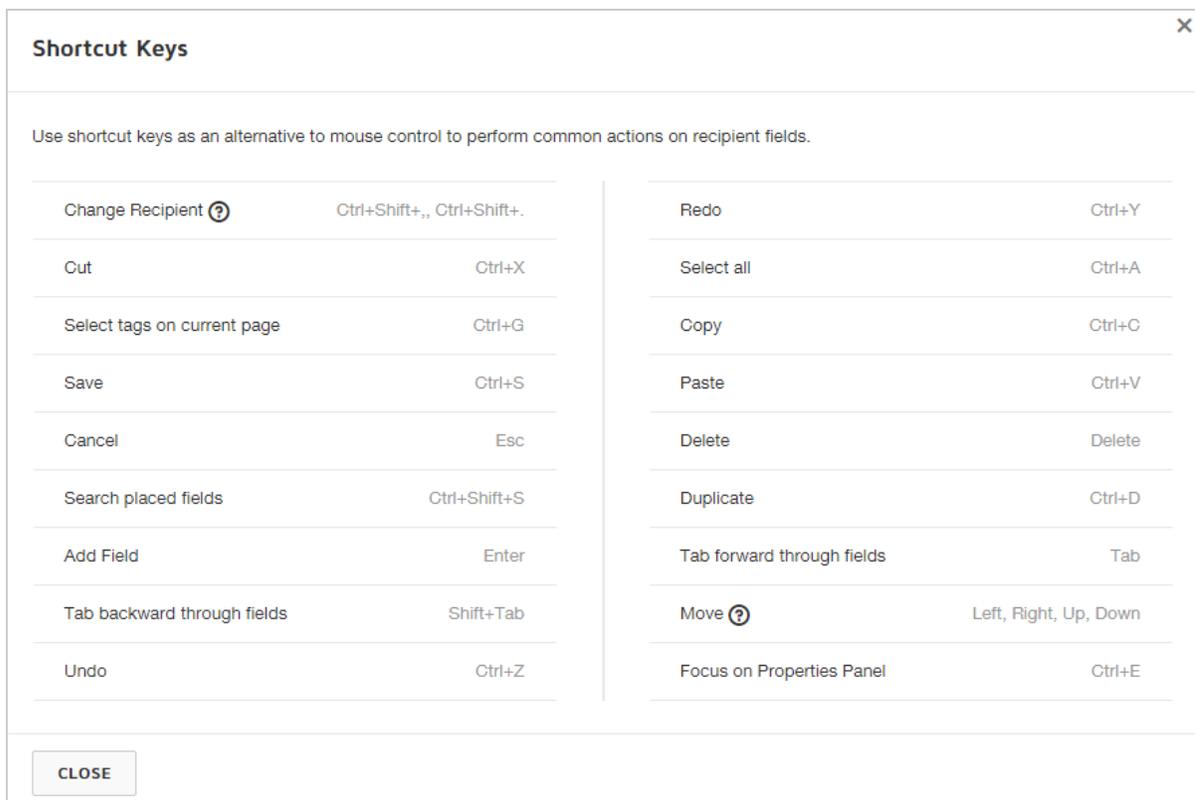
**CLOSE**

### To see the list of shortcuts

1. After preparing your envelope with documents, recipients, and messages, continue to the Add Fields view.
2. At the bottom right of the view, click **SHORTCUTS**.



3. The Shortcut Keys list appears, showing all the supported keyboard controls.



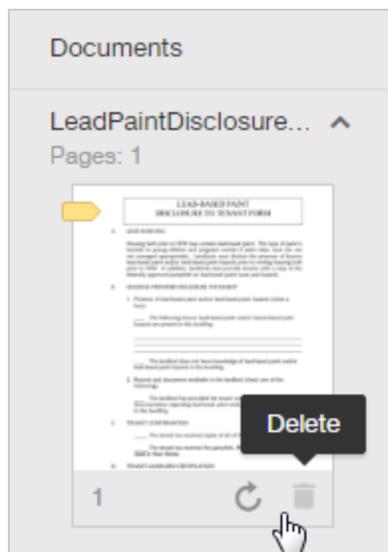
## Delete Pages From a Document

If you upload documents containing pages you don't want to include for recipients, you can easily delete the unwanted pages.

**Note:** If you want to add or remove entire documents, or reorder documents, use the **Other Actions > Edit Documents** option.

### To delete pages

1. After preparing your envelope with documents, recipients, and messages, continue to the Add Fields view.
2. In the Documents list at the right, scroll through the page guide to locate the page you want to delete.
3. Hover over the page thumbnail with your mouse until a trash can icon appears at the bottom right corner of the image.



4. Click the trash can icon to remove the page. Any fields on the page are deleted, along with the page.

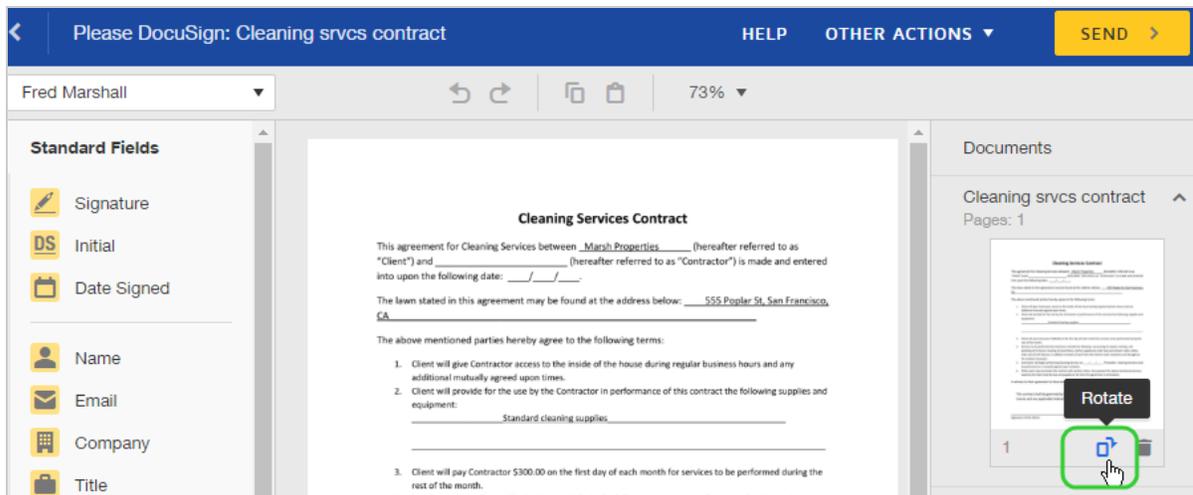
## Rotate Pages in a Document

You can rotate individual pages in a document. If you upload a document and then find you need to rotate a page, you can do so when you add fields for your recipients to complete.

### To rotate a page

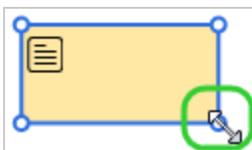
1. After preparing your envelope with documents, recipients, and messages, continue to the Add Fields view.
2. In the Documents list at the right, scroll through the page guide to locate the page you want to rotate.
3. Hover over the page thumbnail with your mouse until a set of controls appears at the bottom of the image.

4. Click the **rotate** icon. Each click rotates the page clockwise 90 degrees.



## Adjust Field Size

Once you place a field on a document, you can adjust many aspects of it. For some field types, you can adjust the size. The fields which you can scale have sizing handles at each corner. Click and drag on any corner to resize the field.



Fields which are populated automatically with recipient information cannot be resized. For example, the Name, Email, Company, and Title fields. When the recipient opens the documents to sign, these fields resize automatically to match the recipient information.

**Note:** Signature and Initial fields are both placed at 100% of their possible sizing. You can reduce the size of these field types, but you cannot make them any larger. If these fields seem too small, see the following advice for dealing with tiny fields.

Fields are also scaled relative to the size (dimensions) and resolution of your document. If you are uploading scanned documents, sometimes this relationship causes your fields to appear very small.

This topic provides information on how to adjust your field size for both of these situations.

### To adjust the actual size of a field

1. Prepare your envelope as usual.
2. Place a scalable field on your document. This is any field with the sizing handles as shown above.
3. Hover your mouse over one of the sizing handles until it changes to a double-headed arrow, indicating you can size the field.
4. Click and drag the field to the required size.

### For fields appearing very tiny

If you upload a scanned file to DocuSign, and your fields appear very small, then the cause is likely one of the following:

- The resolution of your uploaded file
- The page size of your uploaded file

When you scan a document you select a resolution (in dpi) and a page size. DocuSign is maintaining the scanned resolution and page size when the system converts your scanned file to a PDF. If the resolution is high or the page is oversized, then fields appear very small when placed on your document.

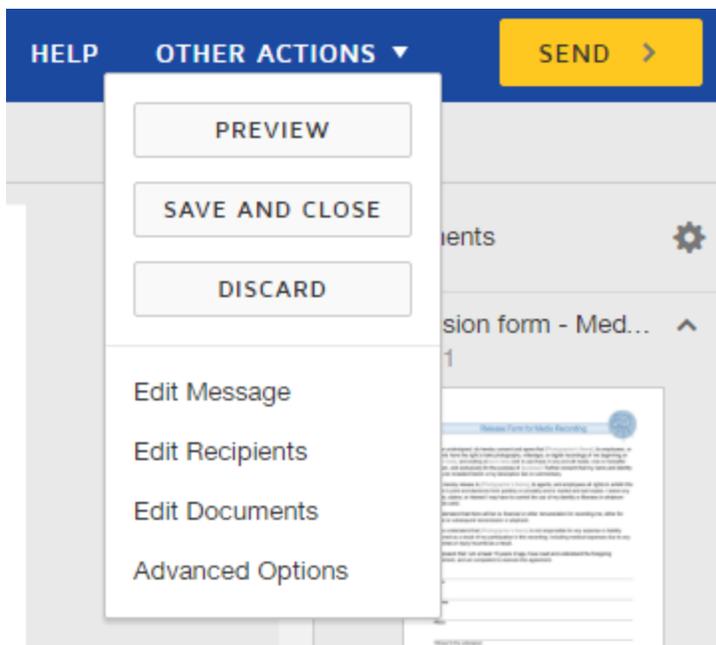
Try the following solutions:

1. Scan your original at a lower resolution. Generally, 200 dpi or lower should produce a manageable resolution.
2. Check the page output size for your scan. If you can set it to 8.5x11", you should get a file that will display fields at an appropriate scale.

## Preview and Send

Once you finish adding documents, recipients, messages, and signing fields, you are ready to preview your work, and then send your envelope.

From the Add Fields view, the top navigation bar presents options to send, preview, save, or discard the envelope:



- To preview your recipients' experience, click **Other Actions** and select **Preview**.
- To send your envelope, click **Send**.
- To save a draft without sending, click **Other Actions** and select **Save and Close**.
- To cancel the envelope preparation and return to your Manage page, click **Other Actions** and select **Discard**.

Once you send your envelope, your recipients receive an email notification, asking them to review and sign.

## About preview

Preview mode offers a simplified view of each recipient's signing experience. You can use this mode to step through each recipient's fields.

- To preview your recipients' experience, click **Other Actions** and select **Preview**.

Previewing as Melanie R. Deschutes 135% 1 / 4 Fields

Select a recipient to preview

Set the zoom level

Step through the recipient's assigned fields

Close the preview mode

## Bill of Sale

This Bill of Sale is made on this Date Signed between:

Full Name \_\_\_\_\_ ("Seller") and  
 \_\_\_\_\_ ("Buyer").

Seller, in exchange for consideration of \$Text the receipt of which funds is acknowledged, hereby do grant, sell, transfer and deliver to Buyer the following goods:

- 6 fax machines
- 117 pens
- the past

Buyer shall have full rights and title to the goods described above.

Seller is the lawful owner of the goods and the goods are free from all

Required fields have a red border

Optional fields have a gray border

- To check field entries, you can select radio button and dropdown values, or enter text.

**Document 1 - Project Plan**

Agreed? YES  NO

Required

**Document 3 - Beneficiary Form**

Name of Beneficiary:

- To preview signature and initials placement, click the fields to see a dummy manifestation.



**Previous Step:** [Add Fields](#)

## Field Types

You can add the following standard fields to your documents:

**Standard Fields**

-  Signature
-  Initial
-  Stamp
-  Date Signed

---

-  Name
-  Email
-  Company
-  Title

---

-  Text
-  Checkbox
-  Dropdown
-  Radio

---

-  Attachment
-  Note
-  Approve
-  Decline
-  Formula
-  Envelope ID

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

### EXAMPLE

Let's say you are sending a purchase agreement to a customer for a custom-built automobile. Your document details the vehicle specifications and the customer's contact information. You need the customer's initials on the specs, requested delivery location, and signature. You use the Initial and Sign Here fields for their initials and signature, and the Text field for the delivery location.

## Set field properties

Some fields automatically populate with the signer's data, while others require the signer to enter some information or make a choice. When you add fields to a document, you can define [field properties](#), such as font styling and character limits.

## Adjust the field size

You can easily [adjust the size of your field](#); just click and drag on the any of the sizing handles at the corners of the field:



## Types of fields

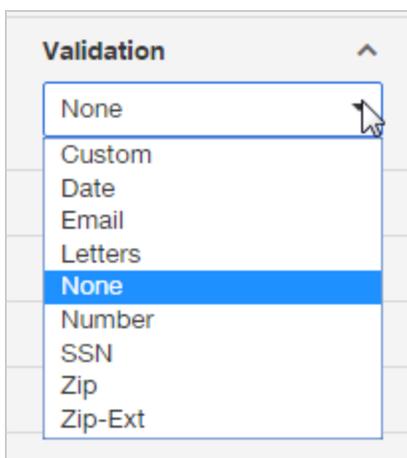
- **Signature.** New users first confirm their signing name and initials, and then select a signature style. When they adopt their signature, it is applied to the signing field. Otherwise, the signature is applied with a single click. Easy! The signing name is the name as you entered it when you added the recipient to your document. Default: Required
- **Initial.** Just like signing, new users first adopt a signature, and then their initials are applied to the document. Default: Required
- **Stamp.** The stamp field enables customers in varying markets, cultures, roles, and industry verticals to apply a stamped image to be representative of their signature, official approval, or company acknowledgment to documents. The stamp field cannot be resized by the sender.

Recipients who have a stamp field to complete, upload a stamp image, size and position it, and adopt it to apply to a document. If the signer is a DocuSign account holder and has previously added a stamp, the stamp is available to select and apply to the document. Once a signer applies a stamp, they can resize it or replace it before they finish signing the document. Default: Required

The stamp field must be enabled for your account by your account administrator in the [Sending Settings](#).

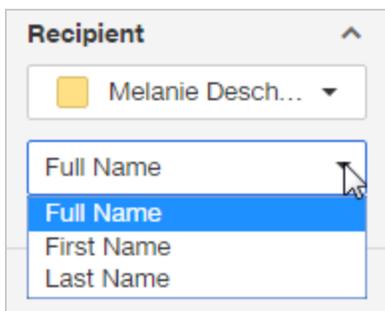
- **Date Signed.** This field is automatically filled in with the current date. Your account administrator can set the format of the date for all documents sent from your account, in the [Signing Settings](#) set for your account. The format can include a time stamp.

- **Text.** This is a free text field for data. By default, the text field accepts any characters. Enter a value in the Character Limit setting of the **Add Text** property to restrict the number of characters the recipient can enter. Set a **Formatting** property to hide text with asterisks, and conceal the signer's data entry from anyone viewing the document. Use the **Validation** property to [restrict the data entry in the field to a specific format](#), such as an email address or a social security number. Place the field on your document and select it. In the field properties pane, expand the **Validation** section, click the drop down, and select the validation format for the field.



Default: Required; Validation - None

- **Name.** This name field supports three formats: First Name, Last Name, or Full Name. Place the field on your document. In the properties panel on the right, select the name format. For First Name, the first word of the name is used. For Last Name, the last word of the name is used.



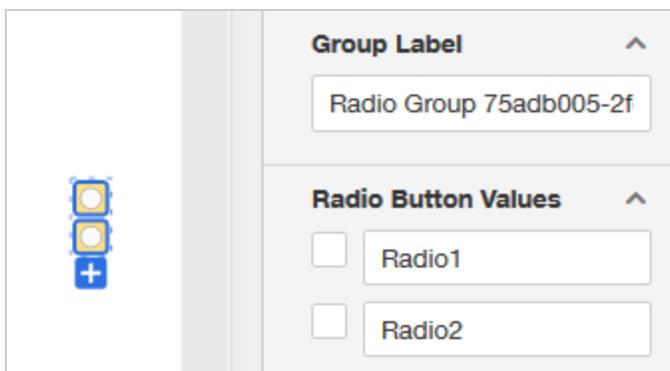
Depending on the format you choose, the field automatically populates with the recipient's name, or portion of the name, as you entered it when you added the recipient to your envelope. If the recipient changes their name when they adopt their signature, the Name field updates to reflect the new name. Default: Full Name

- **Company.** This field automatically populates with the recipient's company name as specified in their preferences My Identity information. If your recipient does not have a DocuSign account, or they have not specified a company name then this field is a blank free text field in which they can enter their information.
- **Title.** Just like the Company field, the Title field automatically populates with the recipient's title from their My Identity information. Otherwise, the recipient can type in their title.
- **Email.** This field automatically populates with the recipient's email address.
- **Checkbox.** This is a standard, square check box for recipients to select one or more options. You can mark the checkbox with the **Initially Checked** property, so that it appears checked to recipients. The check box is always optional, so that your recipient can skip it and still complete the document.

**TIP:** If you have a scenario where your recipient must mark to indicate explicit agreement, use a single radio button and select the Required Field option

- **Radio Button.** Radio buttons provide options from which recipients can select only one response. Radio buttons are placed as a group, and you can add, remove, or position the individual buttons. The group is identifiable by the **Group Label** property, and by the dotted blue line that encompasses all buttons in the group. Radio buttons can be spread out over a document, so these markers can help identify which buttons belong together. On the completed PDF, only the selected option remains, appearing as an "x".

When you add a radio button field, the group contains two options. Click the "+" icon to add an option to the radio group.



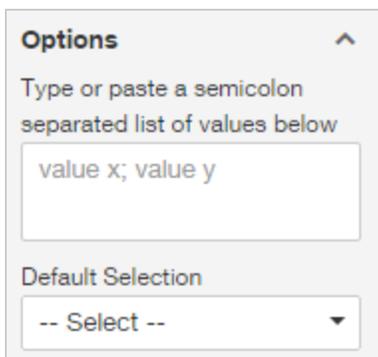
The **Radio Button Values** are not visible to the recipient, but the value for the selected response is included when you [download form data](#) for the document. In order to collect meaningful data from radio button selections by the recipient, enter unique and representative values for each radio button. The recipient will not see these values, but when you download form data you will see the value for the radio button selected.

Default values: "Radio1" "Radio2"

Radio buttons, as a group, can be required or optional. If you set the **Required Field** property, your recipient must select one of the options in order to finish signing. If you have a scenario where your recipient must mark to indicate explicit agreement, use a single radio button and select the Required Field option. Default: Required

**TIP:** When recipients review your documents, they navigate through the fields based on the Auto-Navigation setting for your account. If you use radio buttons on your documents, the options to navigate *blank required fields* are recommended for a smoother signing experience. Your DocuSign administrator sets this option using the new admin view. ([More Info](#))

- **Drop Down.** This field provides a drop-down list of options. Like radio buttons, recipients can select only one value from the drop-down list. When you place the field, the **Options** section opens on the properties panel. Create the options for your drop down list by entering a semicolon-separated list of values in the field provided. This list is what your recipient sees when signing your document. The **Default Selection** list populates with your list of values, and you can select which value to show in the field by default. You can set additional properties in the properties panel, such as formatting and whether or not the field is required.



**Options** ^

Type or paste a semicolon separated list of values below

value x; value y

Default Selection

-- Select -- ▾

The Drop Down field can be required or optional. If you set the Required Field property, your recipient must select one of the options in order to complete the document. Default: Required

- **Attachment.** The Attachment field allows you to request additional documentation from a

recipient. The recipient is asked to upload or fax in the documentation. When they complete the document, the attachment is added to the final document and can be downloaded or printed.

The Attachment field can be required or optional. If you set the **Required Field** property, your recipient must attach a file in order finish signing. Default: Required

- **Note.** The Note field is a free text field that you can use to enter additional information to your recipients. You can add a Note for an individual recipient and the text that you enter appears only during the signing session. Notes are visible only to their assigned recipient. Notes do not remain on the completed documents. However, you can use the [download form data](#) option to recall and view the information.
- **Approve.** The Approve field offers an alternative to a required Signature or Initial field for recipients to approve your documents. The Approve field is always required. If the recipient clicks Approve during the signing process, the recipient is considered to have signed. If the recipient has completed all other required fields, when they click Approve, they complete the signing process.  
  
The Approve field does not add any information on the document, but it records and "Approved" action in the Document history. For your recipient to decline the document, you can add the Decline field, or they can use the Decline to Sign option.  
  
You can adjust the name of the field, as seen by the recipient, using the **Button Text** property.
- **Decline.** The Decline field works the same way as the signing option Decline to Sign. If the recipient clicks the Decline tag during signing, any remaining fields on the documents are skipped, and he is prompted to provide a reason for declining. The Document history records the action and the reason provided by the recipient. You can adjust the name of the field, as seen by the recipient, using the **Button Text** property.
- **Formula.** This calculated field dynamically calculates a result based on recipient-entered values in other fields. You can [build formulas](#) based on numbers or dates, using the standard mathematical operations of addition, subtraction, multiplication, and

division.

- **Envelope ID.** The Envelope ID field allows you to manually place the envelope ID anywhere on your documents. This ID is the unique identifier for an envelope. This identifier is shown in the History, the Certificate of Completion, some envelope reports, and is useful for API developers using the DocuSign API. You can use the Envelope ID field to place and format the ID as you want it to appear. You can set the position, font type, size, and color of the ID stamp.

As an alternative to using the Envelope ID field, you can set the [Advanced Option](#) for a document to automatically stamp the envelope ID onto the document. The stamp is placed at the top left of every page of the document.

You can use either the Envelope ID field or the automatic stamp, or you can use both on a document. However you choose to add the envelope ID to your document, be aware that the ID stamp becomes a permanent part of your document and cannot be removed.

## Field Properties

When you add fields to your documents, you can set a variety of properties. With these properties you can do things like:

- Make a field required or optional
- Change the recipient for a field
- Enter data in the field and make it read only for recipients
- Apply data validation to enforce data entry rules for the recipient
- Set the font, size, or color for a text field
- Hide the recipient's entry in a text field with asterisks for added data security
- Set up conditional field relationships

The properties are similar for all of the field types, though not all properties apply to all fields. You can adjust the properties on a single field tag basis, or to multiple fields at once.

## CONTENTS

[How to set and edit field properties](#)

[Basic properties](#)

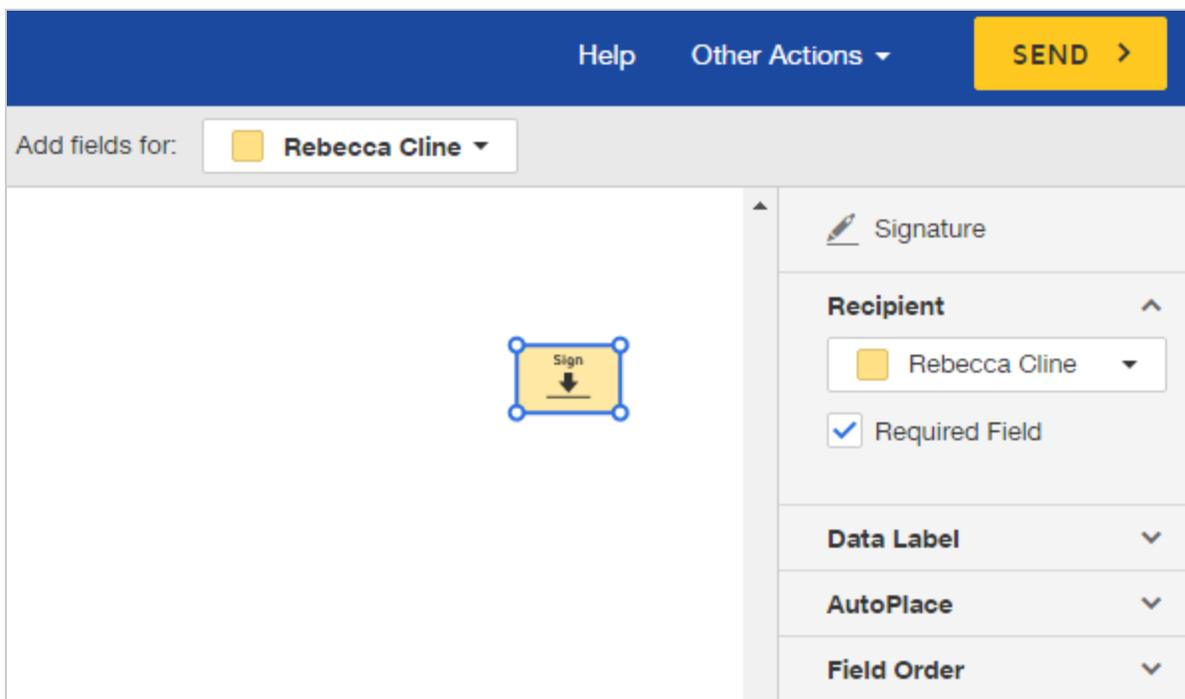
[Advanced properties](#)

## To edit field properties

To access the property settings, do either of the following:

- For a single field, click the field to select it.

The field properties panel slides in over the page guide on the right-hand side to reveal the settings you can adjust:



- For multiple fields, click and drag to encompass the fields to change, or press **SHIFT+Click** to select each field.

The field properties panel slides in. The changes you make to the properties apply to all of the fields currently selected.

## Basic properties

- **Recipient** - controls which recipient the field applies to; use this property to change the recipient for a field tag.
- **Required Field** - specifies whether the field is required or optional; required fields must be completed by the recipient in order to finish the signing process. Only the following fields have this property: Signature, Initial, Company, Title, Text, Radio Button, Drop-down, and Attachment. [Learn more...](#)

- **Add Text** - for text fields, you can enter the field contents to present to recipients. Apply the Read Only property if you want to protect your entry. Set a Character Limit to control how many characters recipients can enter into the field.
- **Read Only** - controls whether the recipient can edit the field; only the following fields have this property: Text, Company, Title, Dropdown, Checkbox, and Radio Button. As the sender, you can complete these fields and mark them as Read Only. All recipients see your entry or selection, but cannot change values. [Learn more...](#)
- **Formatting** - defines the font family, size, and color, and character styling; for text fields, there is an additional formatting property to hide the text entered with asterisks, concealing the data from anyone else viewing the document.
- **Tooltip** - provides use tips that appear when the recipient mouses over the field.

## Advanced properties

- **Data Label** - contains a field identifier that is only visible to the sender. You can use the Data Label property to automatically populate entries across fields, as noted below.

**Note:** If you set the data labels to be *exactly the same for fields of the same type*, the field data becomes linked. When the sender prepares the document or template, or when the signer signs the document, an entry in any one of the linked fields is automatically populated into all fields with the same data label. This behavior is constrained by the data population scope setting for the account. This setting can restrict the entry replication to just within the same uploaded file, or extend it to all files in the document. This setting may be set in DocuSign Admin, under the Sending Settings, and is called "Automatically replicate information in fields with the same Data Label". [Learn more...](#)

If your account administrator does not see this setting, they can contact DocuSign Customer Support for assistance <https://support.docusign.com/>.

- **Group Label** - for radio buttons, this label appears as a tool tip to identify a group of radio buttons and is visible to your document signers.
- **Radio Button Values** - for radio buttons, these are internal values for each radio button. For the response selected by the signer, the corresponding radio button value is included when you [download form data](#) for the document. In order to collect meaningful data from radio button selections by the recipient, enter unique and representative values for each radio button. These values are not visible to the recipient.
- **Location** - control placement of fields through exact x,y coordinates, or use AutoPlace to automatically place copies of a field at every instance of a pre-defined string. [Learn more about AutoPlace...](#) or [Learn more about coordinates...](#)
- **Collaboration** - for text fields, allow all recipients to make and change entries to the fields. Optionally, require all recipients to initial changes. [Learn more...](#)
- **Validation** - for text fields, restrict the type of data signers can enter. [Learn more...](#)
- **Conditional Logic** - set up, review, and edit conditional relationships between fields. [Learn more...](#)
- **Field Order** - specify the order fields are navigated to on each page of a document when recipients sign. Assign a field order does not ensure the signer will be navigated to a field. The auto-navigation setting ultimately controls how fields are presented to signers. For example, if a field has an assigned field order and is set as optional, and the auto-navigation is set to Navigate required fields, then the optional field is still present on the document, but the signer must manually select it to enter data.
- **AutoPlace**- automatically place copies of a field at every instance of a pre-defined string. [Learn more...](#)

## Optional Fields

Sometimes you want to place optional fields for your recipients to consider. Most often, you want to use an optional signature or initial field. For example, a permission form with a signature to be completed only if the recipient wants to grant her permission. Or a series of line items in a service contract—the signer initials only those items they want in the final contract.

### CONTENTS

[Field types with a required option](#)

[How to tell the difference between required and optional fields](#)

[How to make a field optional](#)

### Field types with a required option

The following field types default to required but can be set as optional:

- Signature
- Initial
- Text
- Company
- Title
- Radio Button
- Drop Down
- Attachment

## How to tell the difference between required and optional fields

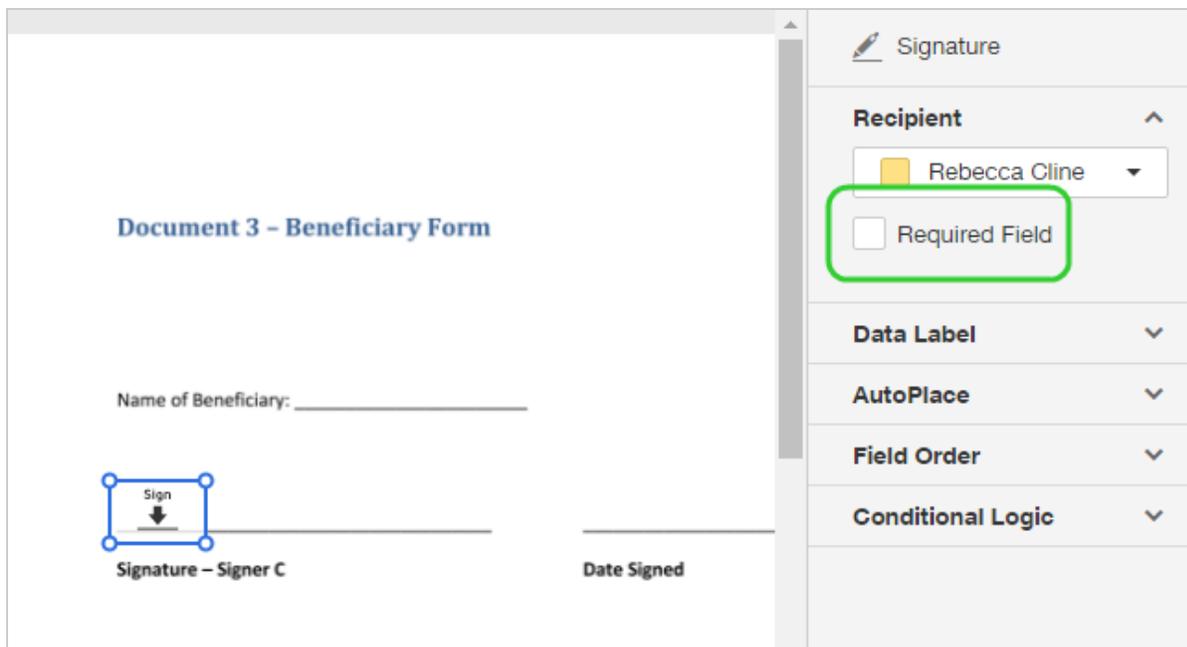
Required fields are filled with the recipient's color, as indicated by the color square next to their name in the **Add fields for:** list. Here's an example showing a required field on the left and an optional one on the right:



## To make a field optional

1. Start an envelope as usual, adding documents, recipients, and messages.
2. In the Add Fields view, click one of the field types listed above and place it onto the document.
3. In the properties panel, uncheck the **Required Field** property. The field is now optional

and signers can choose whether or not to complete it.



## Read Only Fields

For some field types, as the sender, you can complete the fields and mark them as read only for the recipients. The Read Only property locks a field from being changed by any recipient on the envelope.

### CONTENTS

[Field types with a read-only option](#)

[To add read-only fields to a document](#)

## Visibility of read-only fields

### Field types with a read-only option

The following field types can be set to read only:

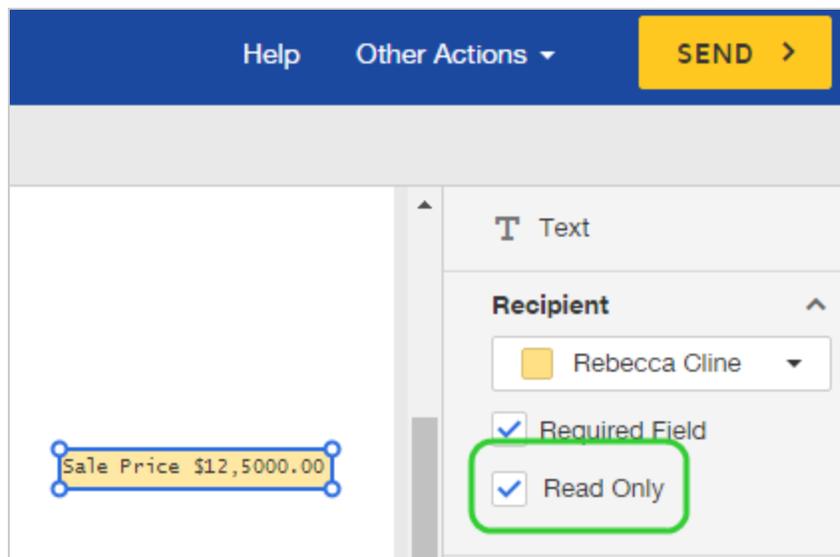
- Text
- Company
- Title
- Drop Down
- Checkbox
- Radio Button

**Note:** Even though you assign read-only fields to a single recipient, the fields and their contents may be seen by all recipients of the document. Read-only fields cannot be edited by recipients. See [Visibility of read-only fields](#) for more information.

### To add read-only fields to a document

1. Prepare your envelope as usual, adding documents, recipients, and messages.
2. In the Add Fields view, click the Text field or other field type as appropriate, and place it on the active document page.
3. In the properties panel, set the desired value for the new field. This value will be visible to all recipients.
4. In the properties panel, select the **Read Only** check box. For recipients, the field is now

read only and cannot be changed. The field and the contents you specified will be visible to all recipients.



## Visibility of read-only fields

There are a few factors that affect which envelope recipients can see the contents of read-only fields. In all cases, recipients cannot modify the read-only values.

- **Account setting to show values to all recipients.** Your account administrator can enable a setting to expose to all recipients any values you enter into fields prior to sending an envelope. See [Sending Settings](#) for more information.
- **Show read-only field values to all recipients.** If your account has not enabled the account setting to show values, you can set a signing order for your recipients and assign the read-only fields to the first recipient in the order.
- **Show read-only field values for recipients who have finished signing.** If you don't use a signing order, and the account setting to show values is not enabled, then recipients

can see field values for any fields assigned to them, plus field values for any fields assigned to recipients who have already finished signing.

## Data Validation for Text Fields

By default, the Text field type accepts any characters. If you need a specific type of information from your signer, data validation allows you to enforce a validation standard on the field, helping to ensure you get the right data from your signer.

When you use data validation, your signer is prompted to provide correctly formatted data. Once they complete the fields accurately, the prompt disappears, and they can finish signing your document.

### CONTENTS

[Supported validation options and examples](#)

[How to apply data validation to a Text field](#)

[Set up custom data validation](#)

## Validation options

The following data validation options are supported:

Validation Option	Format	Examples
Custom	Regular expression - see <a href="#">Custom Data Validation</a>	^\d\$

Validation Option	Format	Examples
Date	MM/DD/YYYY or DD/MM/YYYY or YYYY/MM/DD  The validation format for Date follows the Date Signed format set for the sender's account, reflecting whether the settings starts with a month, day, or year value.	05/31/1995  31/05/1995  1995/05/31
Email	someone@example.com  There is no validation on the actual email entered by the signer. The validation checks for a minimum entry of *@*. and the "*" can be any alphanumeric character. Some special characters are also allowed.	grich@mailnesia.com
Letters	Letters A-Z, in lower or uppercase, and spaces	California   San Pablo Avenue
Numbers	0-9 and one period only - no spaces	25   15.25   4234.00
SSN (Social Security Number)	###-##-####	123-45-6789
ZIP	xxxxx	94501
ZIP5-4	xxxxx-xxxx	94501-1234

### EXAMPLE – Employment Application

Your business is growing and you're hiring! You've set up a DocuSign template with the application form and all the fields applicants need to complete. While the form details the type of information the applicant must provide, you use data

validation where you can to help improve the accuracy of their information. Getting their Social Security Number is critical to processing their application, so you use the SSN data validation to reduce errors and speed up the process. Just one more reason to love DocuSign!

## To apply data validation to a Text field

1. Start an envelope as usual, adding files, recipients, and messages.
2. In the Add Fields view, click the **Text** field and place it on the document.
3. In the properties panel, expand the **Validation** section.
4. Click the drop-down and select the desired option.

## Custom data validation

In addition to the pre-defined validation types, DocuSign offers a Custom validation, which allows you to create more complex validation patterns. If you select **Custom** for your validation type, you provide a regular expression (regex) to formulate a pattern or literal string, which the recipient must match in order to complete the Text field. Using Custom validation, you could enforce just about any data definition you can think of, such as a bank routing number, a single digit, a US currency value, a time value in 24-hour format, password criteria, or a valid credit card number.

### **EXAMPLE – Regular Expression**

Here are just a few example expressions to illustrate the power of custom data

validation:

`^(?=[^\d_].*\d)\w(\w[!@#%]){7,20}` restrict passwords to a length of 8 to 20 alphanumeric characters and select special characters. The password also cannot start with a digit, underscore, or special character, and must contain at least one digit.

`^\d$` matches exactly 1 numeric digit (0-9).

#### **EXAMPLE — Regular Expression for date format and ZIP format in Japan**

Here is an example of validating Japanese date format:

`^(19|20)\d\d年(((01|03|05|07|08|10|12)月(0[1-9]|1[12]\d|3[01]))|((04|06|09|11)月(0[1-9]|1[12]\d|30))|(02月(0[1-9]|1[12]\d)))日$` validates Japanese date format. Example: 2016年4月1日

Here are examples of validating Japanese ZIP format:

`^[0-9]{3}-[0-9]{4}$` validates a 7-digit Japanese ZIP format. Example: 600-8216

`^\d{3}$` validates a 3-digit Japanese ZIP format. Example: 600

DocuSign uses the .NET implementation of regular expressions. For more information on using and building regular expressions, refer to the MSDN .NET Framework Regular Expressions documentation.

There are many useful resources on regular expression definitions, including whole libraries with expression solutions. Here are a couple of resources to get you started:

- [.NET Framework Regular Expressions](#) - Microsoft Developer Network documentation for regular expressions
- [Online tester](#) - RegexStorm.NET free online tester to test regex patterns

## To apply custom data validation

1. Follow the regular procedure to apply data validation to a Text field.
2. Select **Custom** in the Validation drop-down.
3. In the Regex Pattern field, enter the regular expression that defines the data format you want your recipient to enter.
4. In the Error Message field, enter text to guide your recipient to enter correctly formatted data.

## Custom Fields

Create custom versions of standard fields and save them for reuse on future documents that you send. Define any combination of [field properties](#), such as font type or size, validation setting, or autoplacement action. Custom fields help speed up your document preparation by allowing you to save fields customized for your use.

Use a custom field like any other standard field. Just place it on your document, and it retains all of the field properties you defined.

### CONTENTS

[Create a custom field](#)

[Edit a custom field](#)

[Delete a custom field](#)

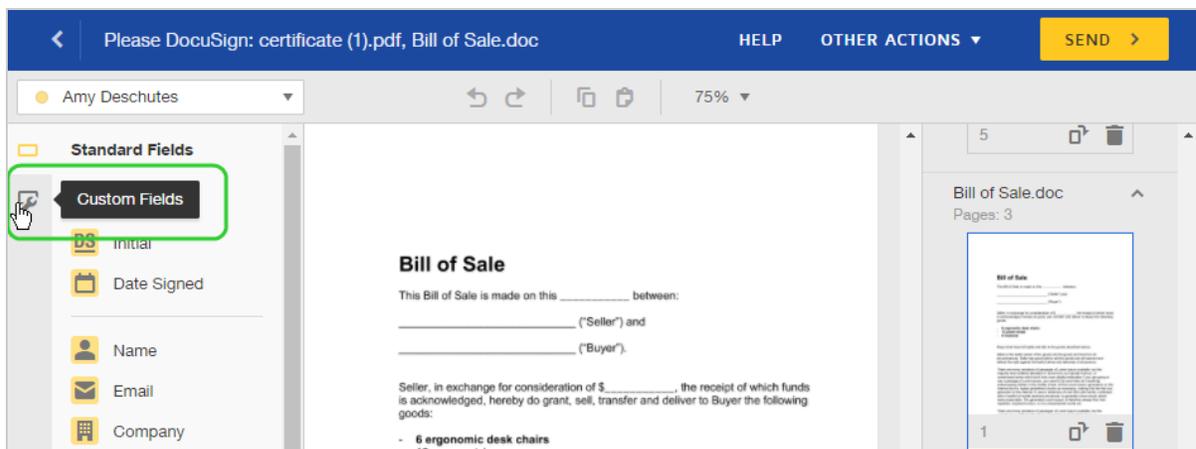
[Related topics](#)

### EXAMPLE — Fields with validation

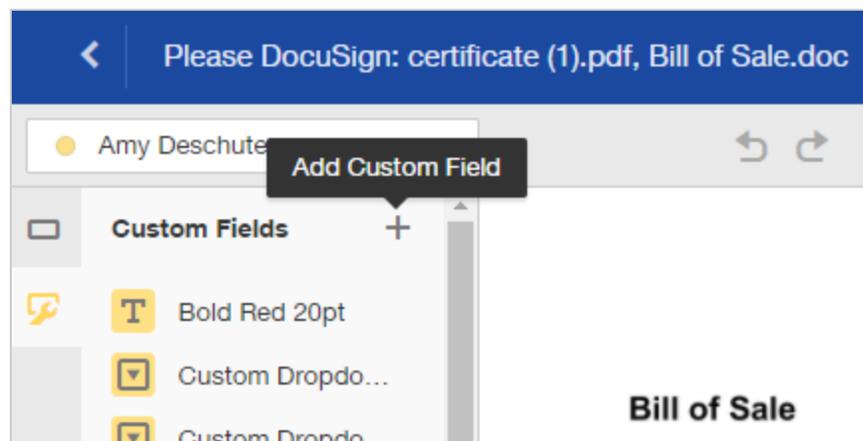
You prepare sales contracts for your company and almost always have to add validated fields for numbers and dates. Rather than repeatedly set up text fields with the proper validation, you create custom fields, which you can quickly apply where needed.

## To create a custom field

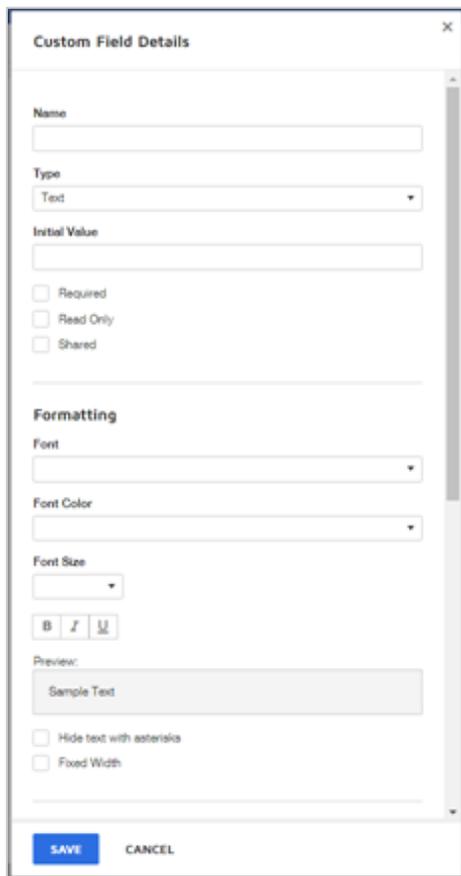
1. Start an envelope as usual, adding documents, recipients, and messages.
2. In the Add Fields view, select the **Custom Fields** palette



3. Click the **+** to add a new custom field.



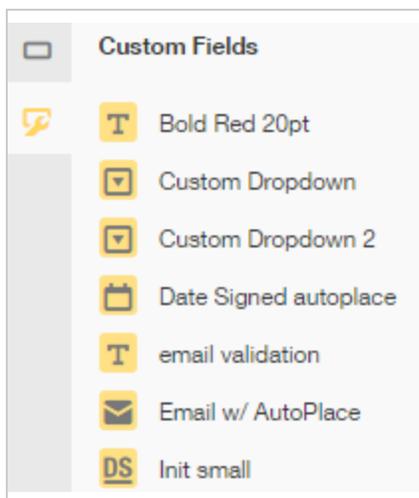
4. In the Custom Field Details dialog, select the field type for your new custom field and enter a name.



The image shows a 'Custom Field Details' dialog box with the following sections:

- Name:** A text input field.
- Type:** A dropdown menu currently set to 'Text'.
- Initial Value:** A text input field.
- Validation:** Three checkboxes: 'Required', 'Read Only', and 'Shared', all of which are currently unchecked.
- Formatting:**
  - Font:** A dropdown menu.
  - Font Color:** A dropdown menu.
  - Font Size:** A dropdown menu.
  - Three icons for text formatting: Bold (B), Italic (I), and Underline (U).
- Preview:** A shaded box containing the text 'Sample Text'.
- Options:** Two checkboxes: 'Hide text with asterisks' and 'Fixed Width', both currently unchecked.
- Buttons:** A blue 'SAVE' button and a 'CANCEL' button.

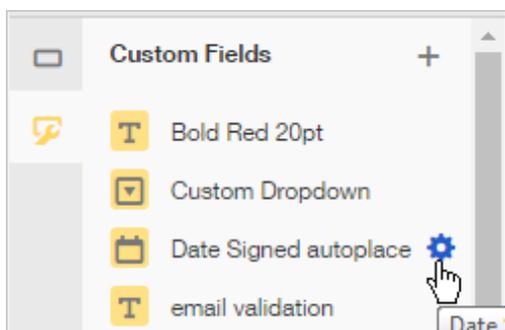
5. Set the properties for your custom field, such as font size, validation type, or AutoPlace.
6. (Optional) Select **Shared** to allow other users on your account to use the field.
7. Once you have set all the properties you wish to use, select **SAVE**.
8. Your new field appears in the list of Custom Fields.



### To edit a custom field

You can edit your own custom fields. You cannot edit custom fields shared with you, unless you are an account administrator. Administrators can edit shared custom fields from all users on their account.

1. Locate the custom field you want to edit in the Custom Fields list.
2. Click the **gear** icon by the field name to open the Custom Field Details dialog.



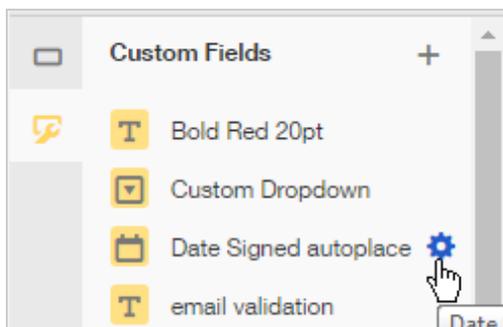
3. Make your changes to the custom field properties and click **SAVE**.

Your updated custom field is available in the Custom Fields list.

## To delete a custom field

You can delete your own custom fields. You cannot delete custom fields shared with you, unless you are an account administrator. Administrators can delete shared custom fields from all users on their account.

1. Locate the custom field you want to delete in the Custom Fields list.
2. Click the **gear** icon by the field name to open the Custom Field Details dialog.



3. Scroll to the bottom of the Custom Field Details dialog and click **DELETE**.

Hide text with asterisks  
Fixed Width

SAVE CANCEL DELETE

## Related topics

For more information on topics related to custom fields, see the following:

- [Manage your custom fields](#). Create, edit, and delete your custom fields from **My Preferences > Custom Fields**.
- [Custom fields for administrators](#). DocuSign admins can create and manage custom fields for their account users.
- [Add fields](#). Basic information on how to add fields, including custom and standard, to your documents.

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## Calculated Fields

With the Formula field, you can build formulas to calculate a value based on number or date fields in your document. When the recipient completes the underlying fields, the Formula field automatically calculates and displays the result.

Formula fields support standard mathematical operators (addition, subtraction, multiplication, and division), signs to evaluate mathematical inequality (<, >, <=>, <=, and >=), and a set of Date functions to calculate a number of days or determine a date.

### **EXAMPLE — Property Management**

You manage several residential properties. Often, a new tenant moves in mid month. You need to prepare a lease agreement with a pro-rated rent for the first month. You use a calculated field to provide the pro-rated rent.

You also have some optional amenities and facilities that tenants can choose to include in their lease. Using a Formula field, you can offer these options in the lease. Based on which option the tenant selects, the Formula field automatically calculates their monthly rent, including the cost of the selected options.

Formulas can reference number or date fields as follows:

- **Text fields** - must be [validated](#) to be either numbers or a date
- **Date Signed fields** - only the date is used in the calculation; if the field is formatted to include hours, they are ignored
- **Dropdown fields** - the options in the dropdown list must be numbers
- **Formula fields** - reference other Formula fields to create more complex formulas

**Note:** Collaborative fields should not be used in the definition of a formula field. If you set up a formula field on your documents, in the calculation for that field, do not reference a field that is marked for collaboration. The collaborative field cannot be processed reliably in calculations, and the formula result shown to signers will not always reflect the value from the collaborative field.

For more information on collaborative fields: [Collaborative Fields](#)

Mathematical formulas use the standard order of operations when calculating a result. Multiplication and division are calculated first, and then addition and subtraction. You can use parentheses to affect the order. Examples:

- $5 + 2 * 10 = 25$
- $(5 + 2) * 10 = 70$

You can use mathematical signs for inequality, such as greater than or less than, to construct formulas containing an evaluation of the result. For example, if you have a group of fields that must add up to less than or equal to 100, you can use a formula to evaluate the total, and then show a conditional note with a warning to correct the values.

- $[Field A] + [Field B] + [Field C] \leq 100$

## Day and Date Functions

Formulas to calculate number of days or a particular date, use either the Date Signed field or a Text field validated as a date. The day and date functions are as follows:

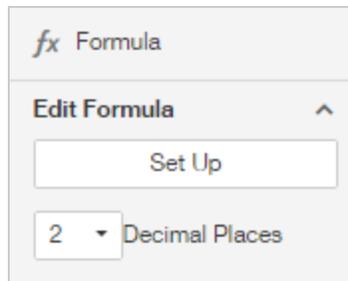
Function	Formula	Details
<b>AddDays</b>	AddDays (d1,n1)	Calculates a number of days (n1) to add or subtract from a date (d1). To subtract, a minus sign ("-") is used before (n1).
<b>AddMonths</b>	AddMonths (d1,n1)	Returns a number of months (n1) to add or subtract from a date (d1). To subtract, a minus sign ("-") is used before (n1).
<b>AddYears</b>	AddYears (d1,n1)	Returns a number of years (n1) to add or subtract from a date (d1). To subtract, a minus sign ("-") is used before (n1).
<b>DateDiff</b>	DateDiff(d1,d2)	Calculates the number of days between two dates (d1-d2)
<b>Day</b>	Day(d)	Returns the current day of the month as a value, 1 through 31
<b>Days</b>	Days(d)	Returns the number of days in the month for the reference date field (d)

## To add a formula field to a document

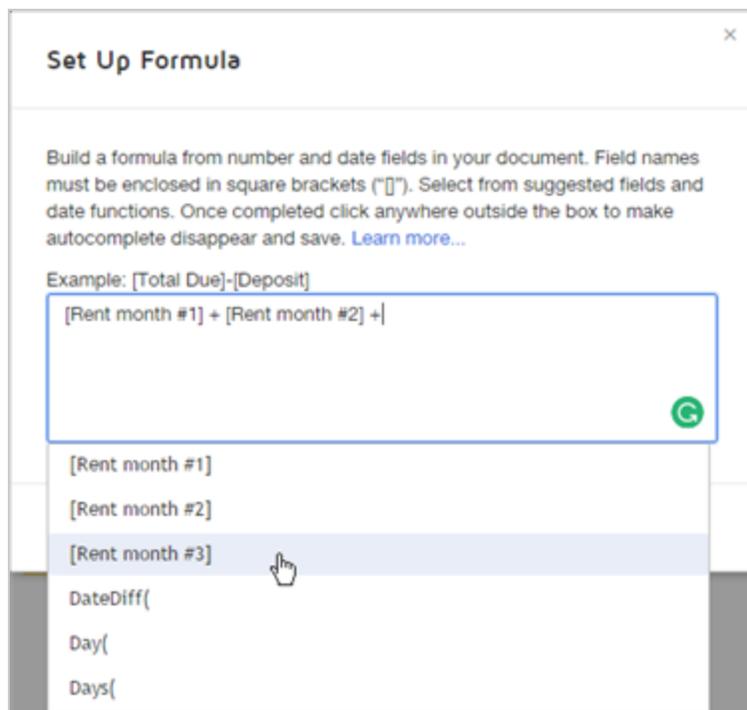
1. Start an envelope as usual, adding files, recipients, and messages.
2. In the Add Fields view, add the Text, Date Signed, and Drop Down fields that you will use in your formula.
  - a. [Set the validation for Text fields](#) as either **Numbers** or **Date**, depending on the type of data you need for your formula.

**TIP:** Set unique and meaningful data labels for the fields. The Formula field uses the label to identify the fields used in a calculation. By default, the labels are unique but nondescript, for example, Text 48acc5d4-5255...
  - b. For Drop Down fields, enter only numbers for the options in the list.

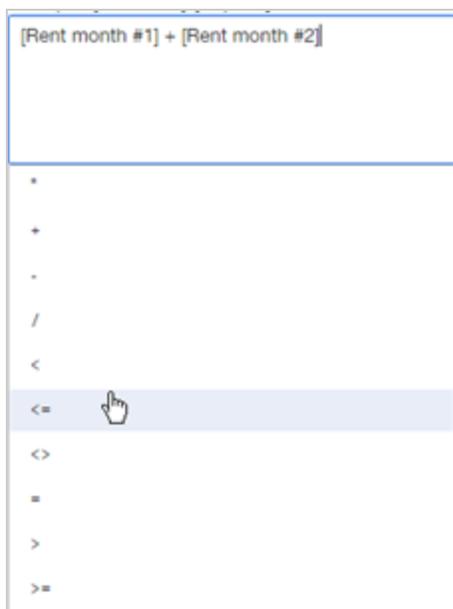
3. Select the **Formula** field and place it on the active document page.
4. (Optional) In the Formula properties panel, enter a meaningful descriptor in the Data Label field. This is useful if you will reference the formula in another formula.
5. In the properties panel, select **Set Up**.



The Set Up Formula dialog appears. Click in the formula box to show the drop-down list containing the available fields to use for the formula.



6. Select from the field names in the drop-down list to start building your formula. You can also type field names; names must be enclosed in square brackets ("[]"). Type or select mathematical operators between fields.



7. When your formula is complete, click **SAVE**.
8. (Optional) Define the number of decimal places for your Formula field. Select the Formula field and in the properties panel, select the desired value from the **Decimal Places** drop-down list.
9. Add any other fields as desired to your document and send as usual.

When your recipient opens and completes the fields used to calculate the Formula field, the field populates with the result.

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## Conditional Fields

With conditional fields, you can hide fields until the recipient makes an entry in your documents that triggers the fields to show, such as selecting a dropdown option or marking a checkbox. Conditional fields allow you to create dynamic documents that support a conditional work flow. Conditional fields only appear to the recipient when a specified condition is met.

Here are some typical conditions to trigger a conditional field:

- A checkbox is checked and the recipient is asked for additional information
- In a dropdown, the option "Other" is selected and the recipient must provide further details
- Specific text is entered in a text field and the recipient must answer an additional question

### **EXAMPLE – Auto Insurance Discount**

On your auto insurance application form, you offer a "Good Student" discount. If the applicant checks a box to request the discount, a Signer Attachment field appears for the applicant to provide proof of the student's GPA.

### **EXAMPLE – Ship To Address**

For your plumbing supply business, your order form requires a billing address. You offer a checkbox for customers to request a different shipping address. If the customer selects that option, then a text field appears for the customer to provide the shipping address.

You can apply conditional logic to the following field types:

- Checkbox
- Radio button
- Dropdown
- Text

You create a rule for your trigger field, and then select which additional fields to show if the recipient's entry in the trigger field matches the rule. The fields you select to show can be of any type.

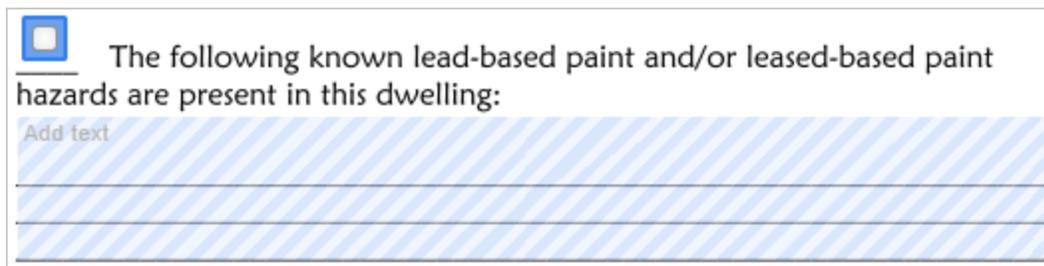
You can create multiple rules for a trigger fields, which allows you to specify different scenarios for your document. For example, if your trigger is a Dropdown, you can set up different fields to show based on which option the recipient selects from the list.

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## To define a conditional field

1. Start an envelope as usual, adding files, recipients, and messages.
2. In the Add Fields view, add all the fields to your documents, including those that will be conditionally displayed.
3. Select the field on your document (checkbox, radio button, drop down, or text) that will act as the trigger field to determine if additional fields are presented to the recipient.
4. In the properties panel, expand the **Conditional Logic** section and select **Create Rule**.

- In the rule banner at the top of the page, define the logic for your rule. In the box for your trigger field value, depending on the field type, you can set the following:
  - Checkbox:** checked or unchecked
  - Radio button:** select the button value
  - Dropdown:** select the dropdown option
  - Text:** enter the specific text for the field value (case-sensitive), or select the gear icon and choose **Any Text**
- Next, select the fields you want to show to the recipient when they trigger the rule. You can select as many fields as you like, of any type, as long as they are assigned to the same recipient as the trigger field. Selected fields are marked with a diagonal watermark to indicate they are conditional:



- Click **Done**.

Your conditional fields are defined. The recipient only sees the conditional fields if they complete the trigger field as defined in the rule logic.
- (Optional) Review and edit conditional fields by selecting the trigger field. The properties panel slides open and the Conditional Logic section shows how your trigger field is set up.

B. HOUSING PROVIDER DISCLOSURE STATEMENT

1. Presence of lead-based paint and/or lead-based paint hazards (check a box):

The following known lead-based paint and/or lead-based paint hazards are present in this dwelling:

The landlord does not have knowledge of lead-based paint and/or lead-based paint hazards in the dwelling.

2. Records and documents available to the landlord (check one of the following):

**Conditional Logic**

If this field is **Checked**, then show:

- Text a6599482-47c0-4...

Edit | Delete

Create Rule

The trigger field has a blue border and selected conditional fields appear with a diagonal watermark for identification.

- **Edit** - Modify the fields selected to show for the conditional rule.
  - **Delete** - Remove the conditional relationship between the trigger field and the fields set to show.
9. Finish defining your conditional fields and send the documents for signature. Recipients only see the conditional fields if they complete the trigger field as defined in the rule logic.

## Collaborative Fields

This feature allows recipients to collaborate on text, radio button, drop down, and check box fields. Collaborative fields are perfect for situations where signers might need to negotiate on changes to your document. For example, a sender and signer may want to propose changes to a closing date or some other small change in the document. Changes are managed within DocuSign, with all changes and approvals recorded in the secure audit trail.

## CONTENTS

[Set up a collaborative field](#)

[How it works](#)

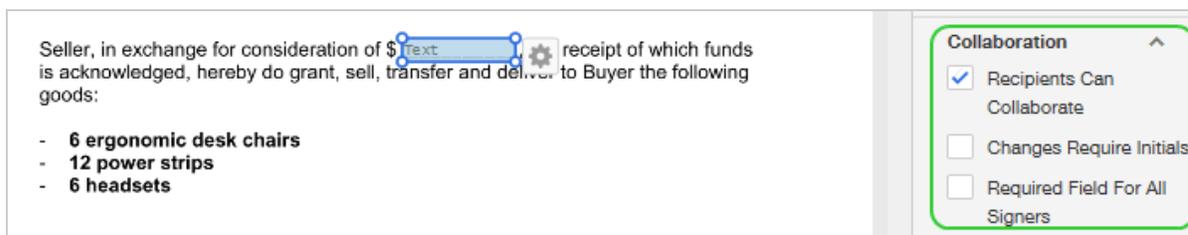
[Document markup and collaboration](#)

[Formula fields and collaboration](#)

[Related topics](#)

### To set up a collaborative field

1. Start an envelope as usual, adding documents, recipients, and messages.
2. In the Add Fields view, add a text, radio button, drop down, or checkbox field to your documents.
3. In the properties panel, expand the **Collaboration** section to show the Collaboration settings.
4. Select the **Recipients Can Collaborate** option.



5. (Optional) If you want all changes to the field to be rerouted to recipients for review and approval, select the **Changes Require Initials** option.
6. (Optional) To make the field required for all recipients and not just the assigned recipient, select the **Required Field For All Signers** option.

This option is not recommended for checkbox fields as it would require the checkbox to always be selected (checked).

7. Add any additional fields for your documents and send as usual.

## How it works

With a collaborative field, all recipients on a document can make or change entries to the field. Optionally, changes made by one recipient can be rerouted to all recipients for review and approval. Recipients that signed a document before the changes were made are given a new opportunity to review and approve the changes before the document is finalized.

### All signers can collaborate

When you enable collaboration on a field, then all recipients can make or change entries. It does not matter to whom you assign the text field, or whether you are using a signing order or not.

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## Document markup and collaboration

Additionally, if Document Markup is enabled for the envelope, field collaboration is allowed on all fields that allow collaboration, even if the setting is not selected on the individual

fields.

**For information on document markup:** [Document Markup](#)

## Formula fields and collaboration

Collaborative fields should not be used in the definition of a formula field. If you set up a formula field on your documents, in the calculation for that field, do not reference a field that is marked for collaboration. The collaborative field cannot be processed reliably in calculations, and the formula result shown to signers will not always reflect the value from the collaborative field.

**For information on formula fields:** [Calculated Fields](#)

## Related topics

- [Strikethrough text for Real Estate](#). For Real Estate plans only, DocuSign offers a Line markup tool enabling real estate senders to strike through text and clauses on standard agreements within DocuSign. This is an alternative to collaborative fields. With this markup tool, the sender can draw lines through areas on documents before sending them to recipients.
- [Document markup](#). Document markup is an advanced sending option that you can enable for any envelope, adding the ability to negotiate changes to documents from within the DocuSign workflow.

## Add Fields Automatically with AutoPlace

AutoPlace adds fields near each occurrence of a given string in a template or document. This advanced field action allows you to specify a string of characters in your document or template for automatic placement of the field.

You can use AutoPlace with any field type—you can even define custom fields to include the AutoPlace setting. When you AutoPlace a field, it is automatically placed at all instances in your document of the specified word or characters.

### Example — Initial Every Page

You have a purchase agreement which your recipient must initial on every page. The document has an "Initial Here" mark where you want to place the field. You add the Initial field to your document using AutoPlace, entering "Initial Here" as the text string to match. Your Initial field is automatically placed at every instance of the words "Initial Here", adding it to every page of your document.

## CONTENTS

[Add fields using AutoPlace](#)

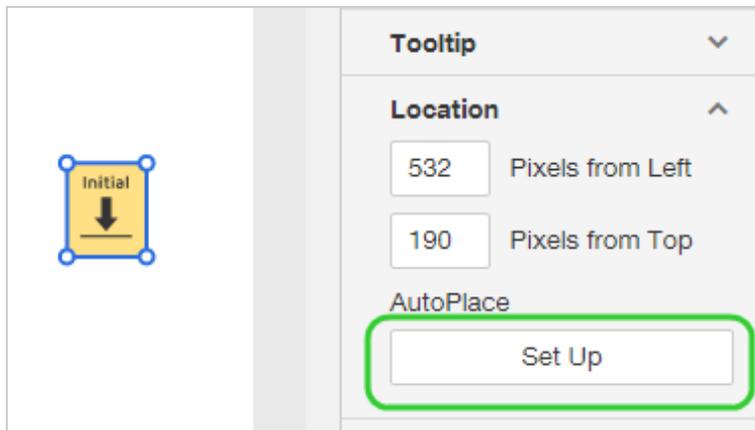
[Review AutoPlace matching and placement considerations](#)

[Read about using AutoPlace with templates](#)

## To AutoPlace fields

1. In the Add Fields view, select the recipient in the Recipients list for whom you want to add fields, and then select and place any one of the available field types to add it to the active page.
2. In the properties panel, expand the **Location** section and under the AutoPlace heading,

click **Set Up**.



3. In the AutoPlace Fields dialog, enter the string of characters to match to and automatically place copies of the field. Consider the matching requirements listed in [Matching and placement considerations](#) to help you define your string.
4. Select **APPLY**.

Your document is scanned for your string, and the fields are placed at each instance.
5. In the results dialog, you see the number of fields placed throughout your document. Continue with one of the following options:
  - **OK** - to make changes to the properties, placement, or size of the fields as a group
  - **UNGROUP** - to make changes to each placed field individually

When you ungroup fields, the AutoPlace association is removed; the fields become independent and are no longer affected by the AutoPlace setup.

You can also ungroup your fields later by selecting any of the grouped fields and clicking **Ungroup** under the AutoPlace section of the properties panel.
6. Select any one of the grouped fields and set additional field properties as needed, such as font size or data validation. Changes are applied to all grouped fields.

7. (Optional) Save your field as a [custom field](#) to use in future documents.

## Matching and placement considerations

There are a few things to consider when defining your AutoPlace string.

- Multiple words, including spaces allowed. Ex. "Enter Total Here"
- Alpha numeric and special characters allowed. Ex. "Sign123!"
- Matches are not case sensitive. Ex. The string "initial" matches "initial", "Initial", and "INITIAL"
- Matches are made on whole string, including any punctuation - no partial matches or wildcards. Ex. To match "Signature:", string must include the colon as "signature:"

When a match is made, the field is placed at the first character in the AutoPlace string.

- You can adjust the placed fields as a group, moving them to the desired offset from their initial placement.
- This placement is different than classic, which applies automatic anchor text tags to the right of the string.
- For each group of placed fields, the data label is the same for all fields in the group. This is important for field types which the recipient fills out, such as text fields. If you leave the data labels the same, when the recipient completes any one of the fields in the group, all the other like fields are automatically populated with the same data.

## AutoPlace action and templates

You can use the AutoPlace action with templates, and it works much the same way as with documents. You add a field, define the text string to match, and the fields are placed on the

first character of every instance of the string. You can then move the fields as a group and adjust other field properties, and save the template.

When you *use* the template, as described in [Use Templates](#), the fields remain in their saved position, and retain all other properties, as set on the template.

If you *apply* the template to another document, as described in [Add Files](#), the AutoPlace fields are added to your document, at the same saved position from the template. That is, they do not reset, based on any instances of the autoplace text string in the target document.

Known as automatic anchor text in the classic experience, even though the automatic placement is different (in classic, tags are placed to the right of the anchor string), if you use a classic-created template in the new experience, the fields remain at the same location as the classic setup.

## Position Fields Using Location Coordinates

Field location coordinates can be used to get and set the precise position of a field.

The screenshot displays a form editor interface. On the left, a form is shown with two main sections: "Social security number" and "Employer identification number". The "Social security number" section contains three "Text" fields, with the first field highlighted by a dashed blue box and a blue circle. The "Employer identification number" section contains two "Text" fields. To the right of the form, a settings panel is visible. It has a "Validation" section with a dropdown arrow and a "Location" section with an upward arrow. The "Location" section contains two input fields: "418" for "Pixels from Left" and "300" for "Pixels from Top". Below these is an "AutoPlace" checkbox.

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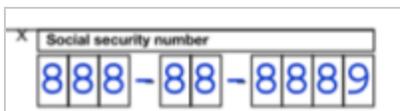
[Use cases for field coordinates](#)

[How to check and set field location](#)

### Use cases for field coordinates

- **Place a field at the exact same location on multiple pages using coordinates.**  
Coordinates provide an alternative to autoplace to position a field at the same coordinates on multiple pages in a document. For example, you want an Initial field at the top right of every page in your document and your document does not contain suitable text to match to. With field coordinates, you can position the field on the first page and check the location values. Then add an Initial field to each additional page, entering the same field coordinates for each one.
- **Place a field in a very exact location so that the entered text fits into a box or area in the underlying document.** It can take a lot of trial and error to determine exactly where the field should be placed to get the desired effect. Once you have this validated placement, the ability to specify coordinates when you place a field means you can easily recreate the placement on another envelope or template, or tell others how to do it.

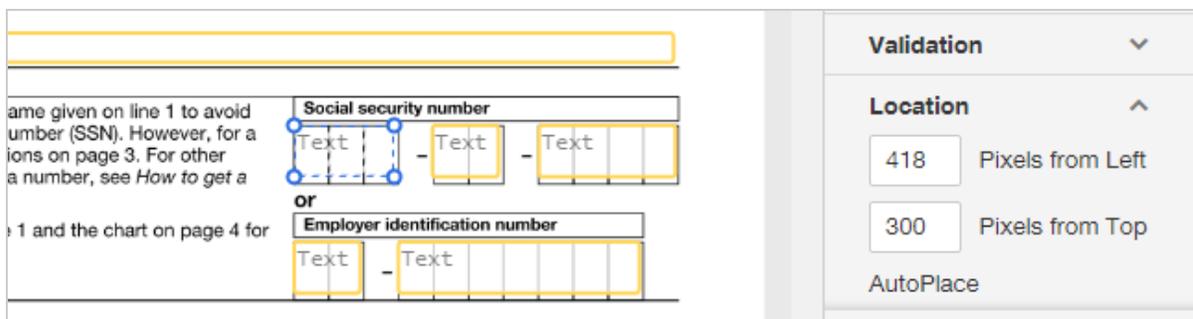
For example, the standard US W-9 tax form has boxes on the form to enter your SSN, with a box for each number. Rather than add a field for each number, you can create one text field with very specific attributes (regular expression mask, specific font size and type, and, most importantly, precise location coordinates). When the envelope is completed, the numbers and dashes typed into a single text field will fall neatly into the boxes and overlay the existing dashes on the original form.



**Note:** API customers should rely on the relevant API call to get a field's x,y coordinates. Currently, the coordinate values returned in the web app do not match those returned by the API.

## To check and set field location

1. Prepare your envelope as usual, adding documents, recipients, and messages.
2. In the Add Fields view, click any field type and place it on the active document page.
3. In the properties panel, expand the **Location** section.



4. Check the values and adjust as desired.

## Recipient Identity Authentication

Recipient identity authentication is an option you can set for individual recipients, requiring them to provide additional information to prove their identity. Identity authentication methods include: phone, SMS, and knowledge-based ID check. You can

select one method for any or all of the recipients on an envelope. If your business case requires a higher threshold for recipients to prove their identity, then use authentication.

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[What if recipients fail the authentication challenge?](#)

### Types of identity authentication

You apply authentication requirements when you [add recipients](#) to your envelope. For DocuSign, the available identity authentication methods are:

- **Phone Authentication:** This method requires the recipient answer a phone call and provide an authentication code, in order to view your documents. You can provide the phone number for the recipient, and also allow the recipient to enter a phone number of their choice. [Learn more...](#)

**Limits:** The phone number can contain space, dashes, and parentheses.

**Note:** Phone Authentication incurs a per use fee. This option is not available if disabled in your account's Recipient Security settings. See your account administrator for details.

- **SMS:** This method requires the recipient receive an SMS text message at a specified phone number. The text message contains an access code, which the recipient must enter in order to view your documents. The recipient has three chances to enter the code correctly. When you select SMS authentication, you provide the phone number for the recipient. The number must be able to receive SMS text messages. To enter the

phone number, you select the country code from the drop-down list, and then enter the complete phone number, including the area code.

**Limits:** The phone number can contain space, dashes, and parentheses.

**Note:** SMS Authentication incurs a per use fee. This option is not available if disabled in your account's Recipient Security settings. See your account administrator for details.

- **Knowledge-Based (KBA):** This method requires the recipient to answer detailed questions about themselves, based on data available in public records (such as their current and former addresses). The DocuSign KBA uses an identity verification service from LexisNexis Risk Solutions that validates user identities in real-time. Recipients are asked a series of top-of-mind questions generated from information from commercially available records. This dynamic identity check service, confirms identities on the fly, without requiring an organization to have a prior relationship with the user.

**Note:** KBA incurs a per use fee. See your account administrator for details.

## Optional or required

By default, recipient authentication is not required; when you send an envelope, you choose whether or not to apply this feature.

However, your DocuSign administrator can choose to impose stricter requirements and require all recipients to pass an authentication check before they can access and sign on any documents sent from the account. (See [Security Settings](#) for more information.) If authentication is required for your account, when you send envelopes you will need to add

one of the identity authentication methods (phone, SMS, or knowledge-based) for each recipient.

### Access codes for basic recipient security

In addition to an authentication method, you can add an access code requirement. You add a code to the envelope and communicate the code to the recipient. The recipient must enter the code correctly in order to view and sign the document. [More info...](#)

### If recipients fail the authentication challenge

If recipients fail the authentication, you can use the [resend](#) feature to send a new notification email and give them another chance to pass the validation step. For example, you have phone authentication on an envelope and the recipient enters an incorrect code three times. They no longer have access to your documents. You locate the envelope on your Manage page and resend it. A new notification email goes out to all outstanding recipients and your signer can again attempt to validate using the access code you provided them.

For knowledge-based authentication failures, the issue is most often that our identity verification service cannot validate the signer's identity. The [envelope history](#) contains additional details regarding authentication failures. These failures are listed in the Activity log as "IDCheck Failed".

## How Phone Authentication Works

Phone authentication is another form of recipient authentication that creates an enhanced level of signer identity. With phone authentication, you require an extra level of authentication your recipients must pass before they can access and DocuSign your documents.

**Note:** DocuSign employs two different phone authentication solutions. Your account settings determine which solution you are using. Information about both solutions are provided in this guide.

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### Overview

Phone authentication provides the following two possible experiences, depending on your account settings. DocuSign is in the process of moving all customers to the new method. Regardless of which phone authentication is in use for your account, details of the phone authentication are recorded on the Certificate of Completion. The phone authentication service is provided through a partnership with a third-party phone authentication provider.

1. **New method:** With phone authentication, a recipient must answer a phone call at a number you or she provides, to receive an authentication code. The recipient enters the number on her computer screen. Once the recipient successfully passes the authentication challenge, she can access and sign your documents as usual.

Phone authentication supports over 70 languages. The phone authentication call is provided in the language matching the recipient's geographical location and their browser language setting.

2. **Old method:** With phone authentication, a recipient must answer a phone call at a number either you or she provides, and then enter an authentication code during the call. Finally, the recipient speaks her name to provide a voice print recording, providing biometric proof for the envelope audit trail. Once the recipient successfully pass the authentication challenge, she can access and sign your documents as usual. For DocuSign Production environments only, the voice print recording is included with the separate PDFs download when you [download the document from the Details view](#). There can be a delay of several days before the recording is available to download.

**Note:** Phone Authentication incurs a per use fee. See your account administrator for details.

## To add phone authentication for a recipient

Let's walk through how you add phone authentication for a recipient and the recipient's experience.

1. Start an envelope as usual, adding documents, recipients, and messages as described in [Sending Documents for Signature](#).
2. In the recipient's row, click the **More** drop down and select **Add access authentication**.

Set signing order

Jeff Deschutes

melanie.deschutes@gmail.com

+ ADD RECIPIENT

NEEDS TO SIGN ▼ MORE ▼

- Add access authentication
- Add private message
- Advanced settings

Set recip

3. Select **Phone \$** for the access authentication method.
4. Use the drop-down menu to select the appropriate country code for the recipient. The selection defaults to a value based on your user or account address. If you change the default, the value is remembered and used for subsequent phone and SMS authentication settings.

Select access authentication Close

Phone \$ +1 Phone number Ext Discard

Allow recipient to provide phone number.

\$ A fee will be charged per usage.

+ ADD AUTHENTICATION

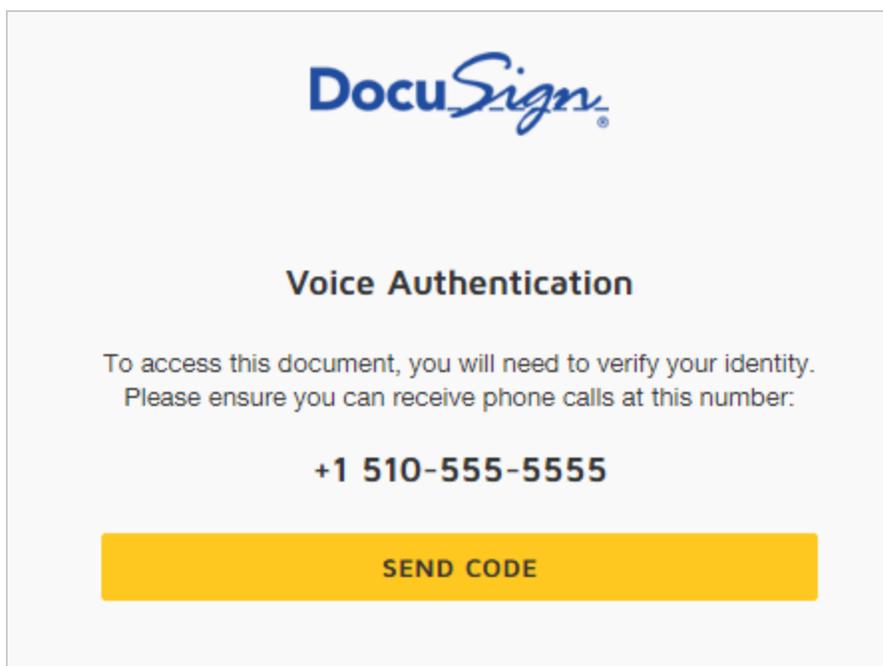
5. Enter the phone number for the recipient. This is a number at which the recipient can receive the authentication challenge. The entry must be numbers, and can include spaces, dashes, and parentheses.  
**Note:** You can leave this field blank and let the recipient provide a number, as described in the next step.
6. (Optional) Check **Allow recipient to provide number** if you want to let the recipient provide a phone number for the authentication process.

7. Finish setting up your envelope by assigning recipient fields and then send it.

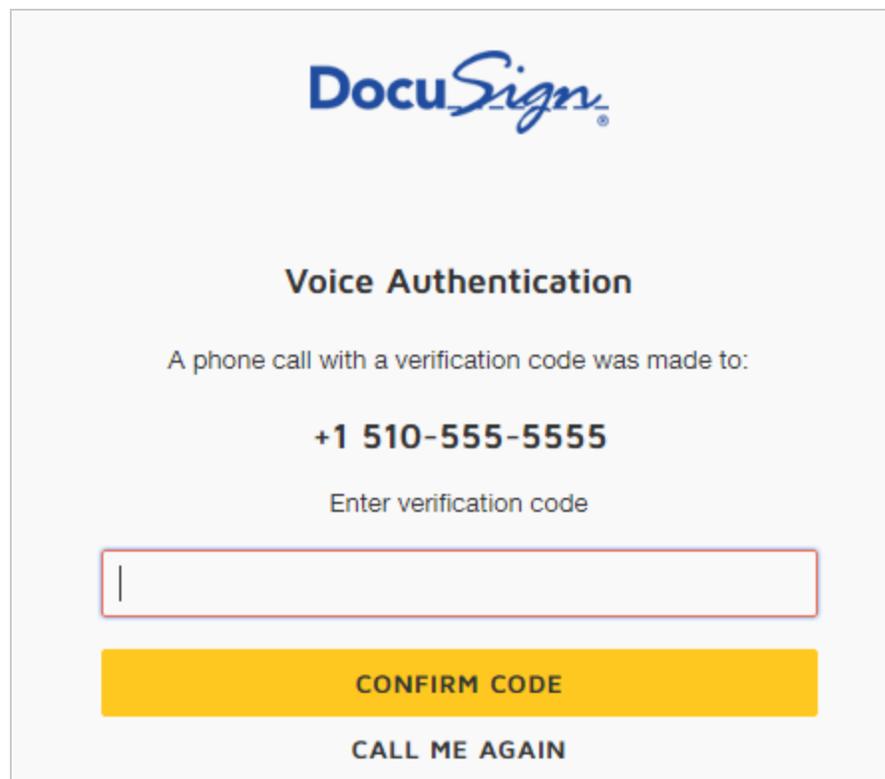
## The recipient experience with voice authentication

Depending on your account settings, recipients will experience one of the following two flows.

1. The recipient receives the standard email notification requesting her signature and clicks **Review Document**. The recipient gets the Voice Authentication page requesting the phone authentication.



2. When the recipient is ready to receive the authentication call, either using the number you provided, or providing one of their own, she clicks **SEND CODE**.
3. The Voice Authentication dialog updates to show the call is in process and provides a place for the recipient to enter the verification code.



The image shows a screenshot of the DocuSign Voice Authentication interface. At the top is the DocuSign logo. Below it, the title "Voice Authentication" is centered. A message states: "A phone call with a verification code was made to:" followed by the phone number "+1 510-555-5555". Below the number is the prompt "Enter verification code". There is a text input field with a vertical cursor on the left. Below the input field is a yellow button labeled "CONFIRM CODE". At the bottom of the dialog is a link labeled "CALL ME AGAIN".

4. Once the call connects, the recipient hears the code read to her.
5. She enters the code in the Voice Authentication dialog and clicks **CONFIRM CODE**.
6. When the authentication is successful, the recipient continues with the standard DocuSign signing process.

#### **Alternative flow - old method**

1. The recipient receives the standard email notification requesting her signature and clicks **Review Document**. The recipient gets the Security Requests page requesting the phone authentication.

## Security Requests from Sender

**From:**  **Steve Anderson**  
GenWatt, Inc.

### Phone Authentication

The sender has selected phone authentication.

1. Choose or enter a phone number where you can receive a phone call, and click the "Call" button below.
2. You will receive a phone call, and will be prompted to provide a code and speak your name.

Authenticating Signer Name: **Kevin Smith**

Please select a phone that you currently can answer to authenticate:

222-333-4444  
 333-444-5555  
 or Enter phone number (with area code):

US/Canada

Ext.

If you are not near a phone to authenticate you, click "Cancel", and return when you are near one of the above phones.

2. When the recipient is ready to receive the authentication call, either using the number you provided, or providing one of their own, she clicks **Call**.
3. The Security Requests dialog updates to show the call is in process and provides an authentication code.

## Security Requests from Sender

From:  **Steve Anderson**  
GenWatt, Inc.

Phone Authentication  
**Call Placed. Your phone should ring within 10 seconds.**

When your phone rings, you must enter the following Authentication Code into your phone.

**Authentication Code: 91643**

Once you enter the code in response to the telephone prompt, and provide a voice sample, you will be authenticated.

If your phone does not ring within a minute, click "Back" and ensure you have entered the correct phone information.

4. Once the call connects, the recipient is prompted to say or enter the code.
5. If the voice recording option is configured on your account, the recipient is prompted to record their name, creating a voice print that is recorded with the transaction.
6. When the authentication is successful, the recipient continues with the standard DocuSign signing process.

## Access Codes for Recipients

Adding an access code for your recipients adds an extra level of security to your documents. You add a code to a recipient on the document, and then communicate the code to the recipient. You can relay the code in any way that you wish, such as by phone

or in a separate email communication. However, do not include the code in the document message, as this would reduce the security value of the code. The recipient must enter the code correctly in order to view and sign the document.

**Limits:** The code can be up to 50 characters long, and contain alphanumeric and special characters, except for "<", ">", and "&#". You can use upper- and lower-case letters, but the code is not case-sensitive. Your DocuSign administrator can set access code rules to specify the requirements for valid codes. See [Security Settings](#) for details.

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[Add an access code for a recipient](#)

[Autogenerate codes for greater security](#)

[What if recipients fail the security challenge?](#)

[Access codes and templates](#)

[Combine access code and recipient authentication](#)

## To add an access code for a recipient

1. Add a recipient to a new document.
2. Click **MORE** and select **Add access authentication**.
3. Select **Access Code** in the authentication drop-down and enter a code using alphanumeric and special characters.

**Add Recipients**

As the sender, you automatically receive a copy of the completed documents.

Set signing order

Elisabeth Schreiber  
schreiberlabs@gmail.com

Select access authentication  
Access Code

Enter access code Discard

NEEDS TO SIGN MORE

- Add access authentication
- Add private message
- Advanced settings

4. Provide the code to your recipient. You can relay the code in any way that you wish, such as by phone or in a separate email communication. However, do not include the code in the document message, as this would reduce the security value of the code. When you send your document, the recipient must provide the access code in order to open the document.

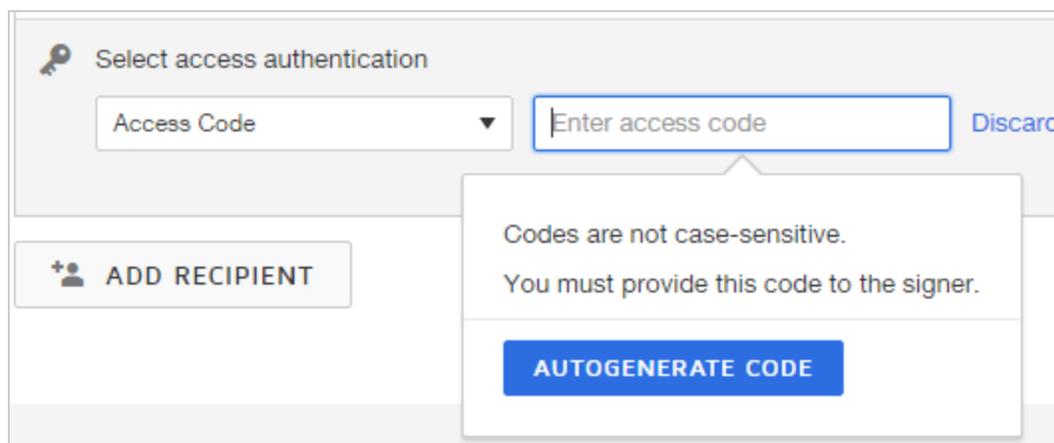
### Autogenerate codes for greater security

If the feature is enabled for your account, you can use the autogenerate code option to enter an access code. The code is generated in accordance with the access code format rules set for your account. The autogenerated codes provide a higher level of security due to their randomness and complexity.

Many DocuSign customers use access codes. However, most of them create simplistic codes like "123", which don't add much security to the transaction. The access code generator is designed to help you generate more secure codes.

## To autogenerate an access code

1. Add an access code to a recipient, and click in the empty code box.
2. Click **AUTOGENERATE CODE**.



Select access authentication

Access Code ▼

Enter access code

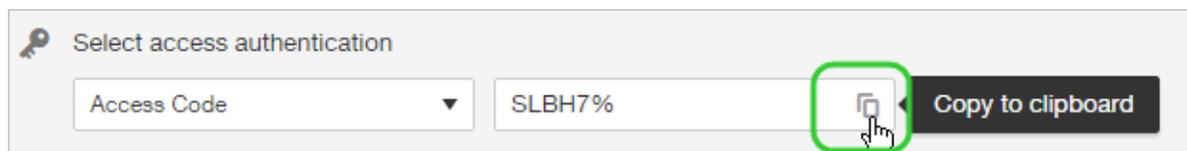
Discard

+ ADD RECIPIENT

Codes are not case-sensitive.  
You must provide this code to the signer.

**AUTOGENERATE CODE**

3. Use the **copy to clipboard** option to copy the code so that you can communicate it to the recipient.



Select access authentication

Access Code ▼

SLBH7%

Copy to clipboard

## If recipients fail the authentication challenge

If recipients fail the authentication, or have lost the code, and cannot access your document, what can you do?

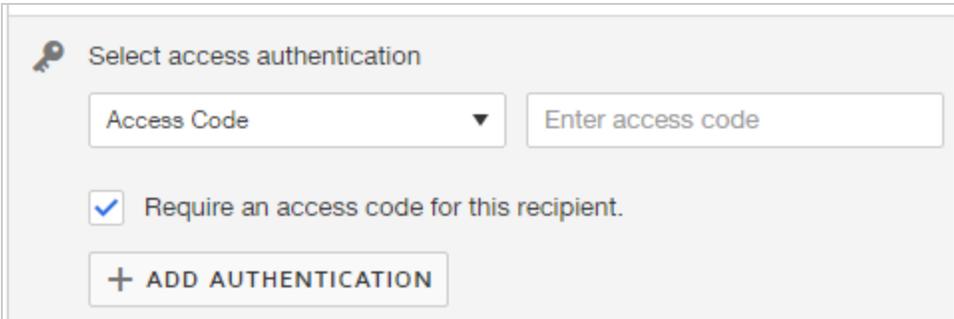
- **Resend.** Use the [resend](#) feature to send a new notification email and give them another chance to pass the validation step.
- **Check the code.** If you need to check the recipient's assigned code, you can see it in the [Document details](#) view.
- **Correct.** Use the [correct](#) feature to modify the document to remove or change the access code requirement.

## Access codes and templates

Just as with documents, you can apply access code requirements to template recipients. You can add an access code requirement to a template role or a named person.

With a template, you have the added options to:

- Make the access code required. Select the **Require an access code...** option. When the template is used to send a document, the sender must enter an access code for the recipient.



The screenshot shows a dialog box titled "Select access authentication" with a key icon. It contains a dropdown menu currently set to "Access Code" and a text input field labeled "Enter access code". Below these is a checked checkbox with the text "Require an access code for this recipient." At the bottom of the dialog is a button labeled "+ ADD AUTHENTICATION".

- Enforce a specific access code. Enter a code, and then set the Advanced Option **Don't allow senders to edit, add, or remove recipients.** When the template is used to send a

document, the access code you entered is applied to the recipient and cannot be changed or removed.

## Combine access codes and recipient authentication

To enhance document security even further, you can combine an access code with a recipient authentication method. Recipient authentication methods include phone, SMS, and knowledge-based ID check. See [Recipient Authentication](#) for more info.

## Sign a Document From Your Account

Sometimes you want to just sign a document yourself—just you, no other signers. And maybe you want to send a copy of the signed document to others. This could be a document someone sends to you outside of DocuSign, or a form you need to fill out and send to someone. With the Sign a Document feature, you can quickly upload a document to your DocuSign account, sign it, and send the signed document to anyone who needs to receive a copy.

You can start a new document to sign from either the Home page or the Manage page.

**IMPORTANT:** When you are the only signer on a document, if you have an account plan that includes a limited number of envelopes you can send, be sure to use the **Sign a Document** link from either the Manage or Home page to create your document. With Sign a Document, you are the only signer, and it does not count against the number of envelopes you can send from your account for others to sign.

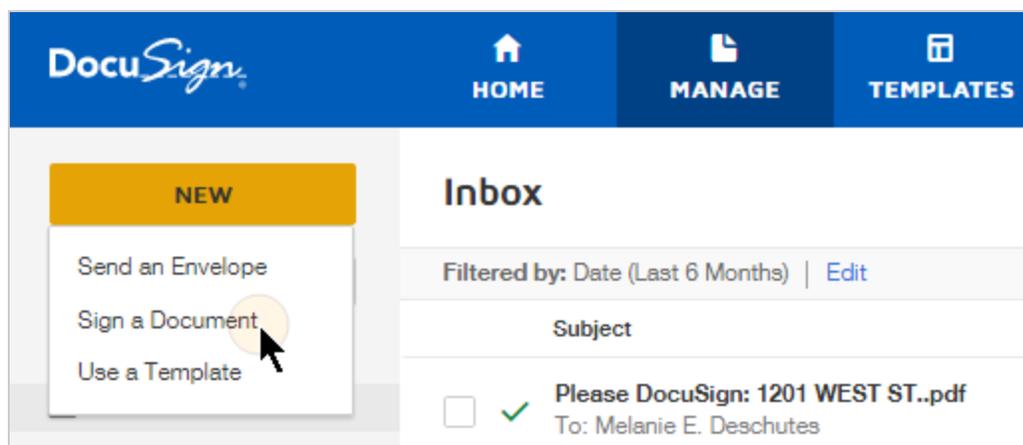
## Sign a Document Video

Here's a short video on signing documents yourself to get you started:

[Click here to watch video](#)

### To sign a document

1. From the Manage or Home page, click the **NEW** drop down and select **Sign a Document**:



2. In the Sign a Document window, add your document by any of the available methods: upload a file, add from cloud storage, or drag and drop a file. You can add multiple documents to sign.
3. To sign your document, click **SIGN**.
4. (Optional) If the file you uploaded is a PDF that contains form fields, you have the option to add these fields, and any data they contain to your document:

Please Review & Act on These Documents

 **Melanie Deschutes, CPM**  
Melanie Deschutes Properties

Please review the documents below.

**DOCUSIGN CAN HELP!**

DocuSign has identified form fields from your document.  
Would you like to apply those to your document signing?

**YES** **NO**

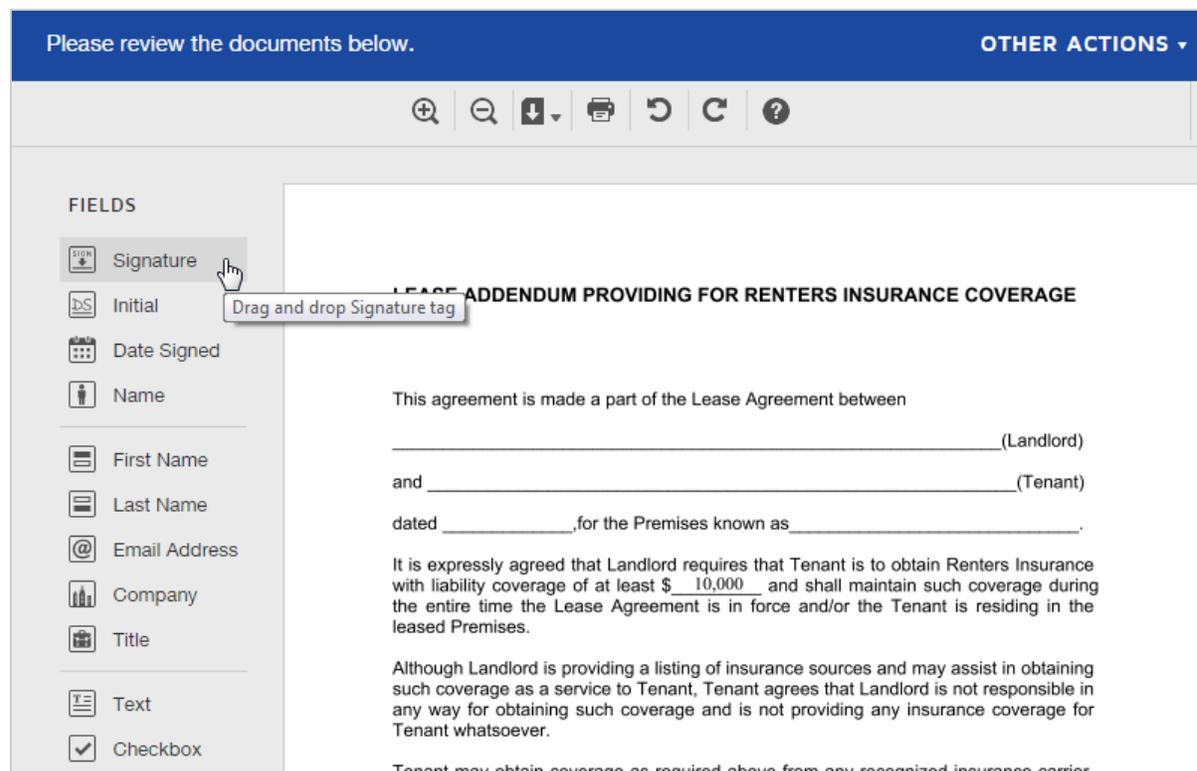
FOR R

This agreement is made a part of the Lease A

5. In the signing view, click **CONTINUE**.

Your document is ready to sign.

6. Use the **FIELDS** menu to drag the fields you want to add to your document.



7. When you're done signing your document, click **FINISH**.  
The Sign and Return dialog appears.
8. (Optional) If you want to send a copy of the signed document to others, complete the following details:
  - a. Enter the email address and name of your recipient.
  - b. For each additional recipient, click **+Add Recipient** and enter the information.
  - c. Use the default Subject, or change it to whatever you like.
  - d. (Optional) Enter a message for the recipients.
9. Click **Send and Close**.

10. Your document is signed and the completed document appears at the top of your Inbox list. If you want, you can [download or print](#) your document. If you chose to send a copy to others, they receive an email with the signed document attached.

## In Person Signing

If you are meeting in person with someone, you can use In Person Signing to simplify the signing process. With In Person Signing, a host facilitates a DocuSign session. The host must be a DocuSign account holder; signers are only required to be with the host in order to sign documents.

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[Set up an in person signing recipient](#)

[Conduct an in person signing session](#)

### Overview

Conducting the in person signing session entails getting together with your signer(s), and initiating the signing session from your device. As the host, you start the signing session, and then guide your signers through the process.

#### **EXAMPLE – In Person Signing**

Let's say you're an independent insurance agent and you meet with a client to review a new health insurance policy. The client is ready to sign. You use DocuSign to keep business digital, so you log in to your account and create a

new document from a saved template for health insurance policies. You assign yourself as the signing host and your client as the in person signer. From your computer or mobile device, you start the signing session and guide your client through the signing process. At the end of the meeting, you have a signed policy and a satisfied client.

Setting up in person signing is similar to the regular process for sending envelopes. The main difference is in how you create the recipients for your envelope, and then the signing event itself. An in person signing can include both in person signers, and regular recipients, as described in [Add Recipients](#). And you can use a signing order to create a workflow for your envelope.

The following screenshot is an example of in person signing. The host is account-holder Melanie Deschutes, and the in person signer, Margot Rivera. Margot works with the host Melanie to sign the document. Once Margot signs, Lissa Burnky receives a copy of the signed document.

## Add Recipients

As the sender, you automatically receive a copy of the completed documents.

 IMPORT BULK LIST  ADD FROM CONTACTS  
 SIGNING ORDER

Set signing order

1   IN PERSON SIGNER ▾ MORE ▾

2  CC RECEIVES A COPY ▾ MORE ▾

 ADD RECIPIENT

**Note:** The host's identity for an in person signing session is recorded on the envelope Details and the Certificate of Completion. The host can view and download the documents from their account.

### To set up in person signing

1. Start a new envelope as described in [Start an Envelope](#), and add documents as usual.
2. To add an in person signer:
  - a. Enter the signer's name in the Name field. **Note:** The person's signature will appear exactly as you enter it in this field.
  - b. For the recipient action, select **In Person Signer**.  
Blank fields for the host name and email appear.

- c. Enter the host information in the **Host Name** and **Host Email** fields - this could be you or anyone with a valid DocuSign account.
  - d. If the host or anyone else needs to sign the documents, click **Add Recipient** and add them as a separate recipient.
3. Follow the same process for adding messages and fields as described in [Sending Documents for Signature](#).
4. Send the envelope.

The host receives an email notification for each in person signer and the envelope appears in their Manage list Inbox with the status **Needs to Sign**. Signers do not receive any notification.

## To conduct an in person signing session

1. As the host for an in person signing transaction, if all of your signers are present,
  - a. Log in to your DocuSign account, locate the envelope to be signed, and click **SIGN**.
  - b. Follow the wizard to collect the signatures and other requested information from your in person signer.
  - c. If a signer chooses to provide their email address, they receive an email notification when the envelope is completed. The notification includes an attachment with the completed PDF and a permanent link to the documents, from which they can view, print, or download the PDF.
  - d. Repeat steps a-c for each additional signer.
2. If only some of your signers are present,
  - a. Locate the email notification naming the in person signer who is available to sign, and click **View Documents**.

- b. Follow the wizard to collect the signatures and other requested information from your in person signer.
  - c. If a signer chooses to provide their email address, they receive an email notification when the document is completed. The notification includes an attachment with the completed PDF and a permanent link to the documents, from which they can view, print, or download the PDF.
  - d. Once you are with the next signer, repeat steps a-c for each additional signer.
3. Once all signers have completed their in person signing, the envelope is complete and any signer who provided an email address receives the completed email notification.

## Send a PDF with Form Fields

When you start a new envelope, if you upload a PDF that has form fields, DocuSign recognizes and converts the fields to DocuSign recipient fields. As you set up your document, you choose how to apply the converted fields:

- **Assign** all of the fields to a recipient; any data that was entered into the original form is included in the DocuSign field. All fields are assigned to one recipient, but you can change the recipient assignment after you convert the form fields.
- **Flatten** the fields, converting the contents of the fields from the original PDF form into a permanent, read-only part of your document.
- **Delete** all of the fields and any data they contain.

### **EXAMPLE — Insurance application**

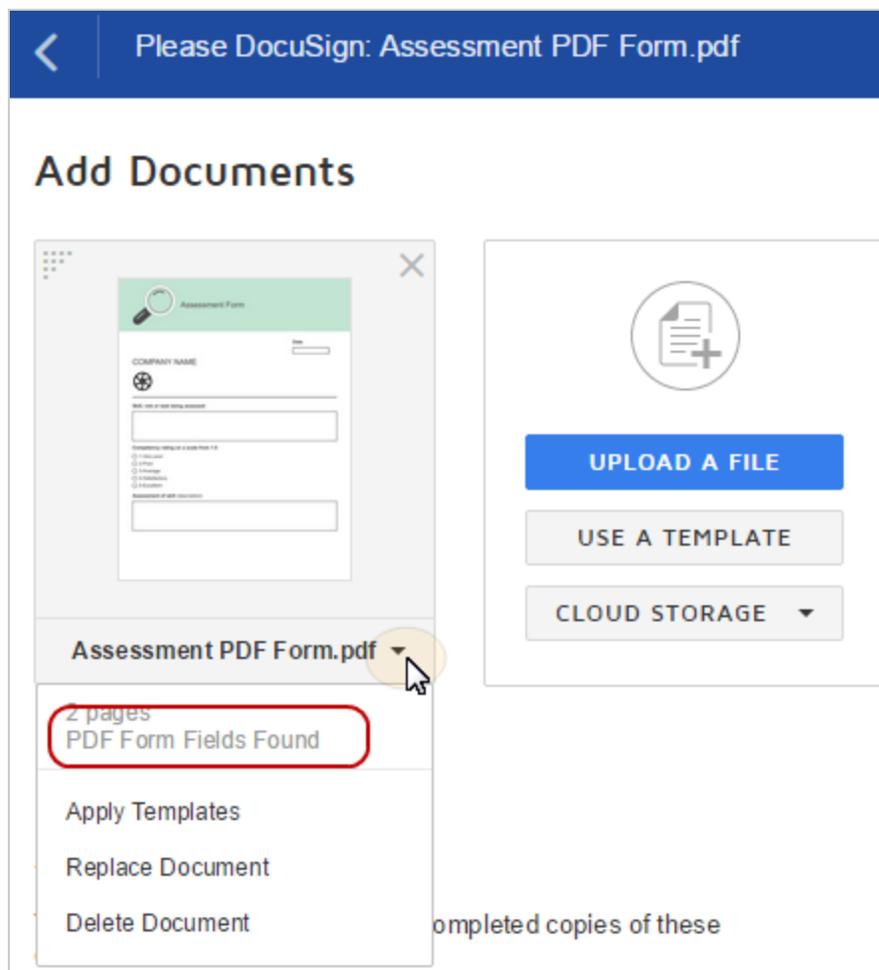
Your insurance agency has a coverage application form. The form is a PDF with

form fields. Prospective customers download the form from your website, and then complete it on their local computer and return it to you by email. You use DocuSign to send the application through your agency's internal review and approval process. You upload the application to DocuSign, which recognizes the form fields and their contents. You flatten the fields, making the applicant's information read-only and a permanent part of the application.

This topic explains how to upload a PDF with form fields to DocuSign, and then choose how to manage the fields and their contents.

### To send a PDF with form fields

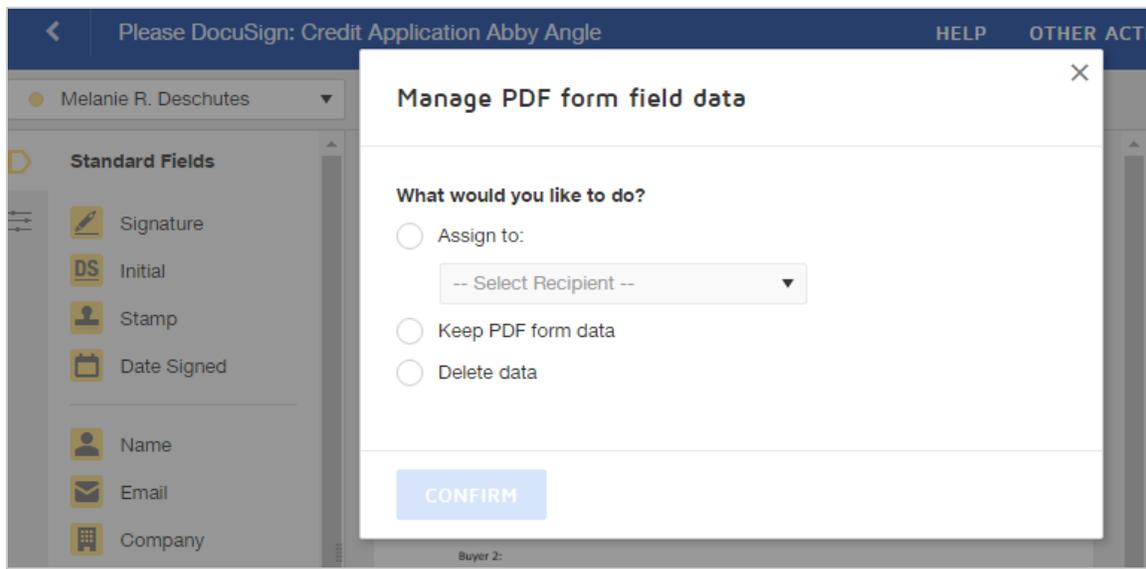
1. Start a new envelope as described in [Start an Envelope](#), and upload the PDF with form fields.



A confirmation appears on the uploaded document's action list, indicating there are form fields in your document.

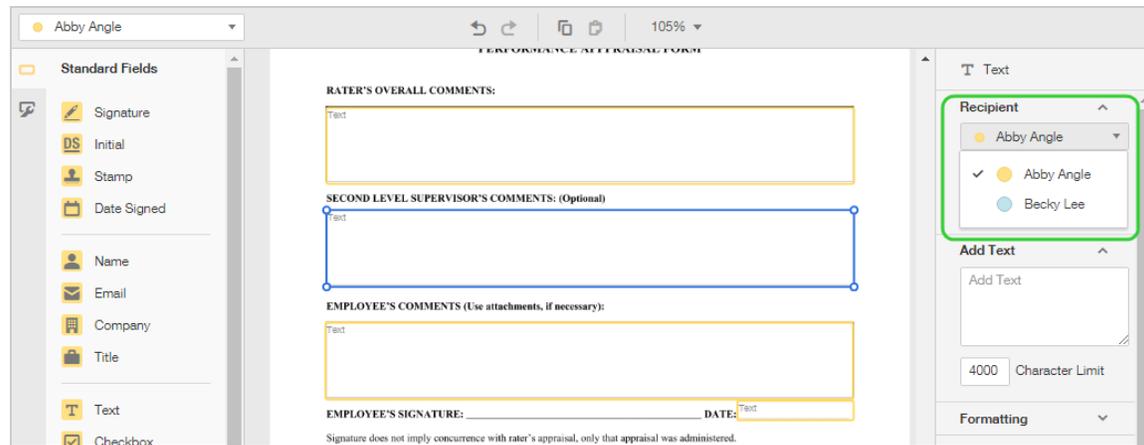
2. To add the recipients and messages, follow the regular procedures described in [Add Recipients](#) and [Add Messages](#).
3. Click **NEXT >**.

The Add Fields view appears with your document, showing the **Manage PDF form field data** dialog.



4. Select how you would like to manage the PDF form fields:
  - **Assign to.** Select the recipient to assign the fields to. The field outline changes to match the recipient's color code. All fields are assigned to one recipient, but you can change the recipient assignment after you convert the form fields.
  - **Keep PDF form data.** Select this option to convert the contents of the form fields from the original PDF form into a permanent, read-only part of your document.
  - **Delete data.** Select this option to delete the converted fields from your document. All of the form fields, and any data they contain, are removed from your document.
  
5. (Optional) If you assigned the form fields and you want to change the recipient for any of the converted form fields:
  - a. Select the field to reassign. (Use **Shift+click** to select multiple fields.)
  - b. In the field properties panel on the right, expand the **Recipient** list and click the

recipient you want to assign the selected fields to.



6. Finish preparing your document as usual, adding additional fields if needed.

## Using Bulk Send

With the Bulk Send feature, you can easily send the same documents to a large number of recipients. You simply set up your envelope once, import your recipients, and each receives a unique copy of the documents to complete. Additionally, you can customize authentication, add notes and other custom information for each recipient.

### **Example — Annual Compensation Plans**

Every year, your company must communicate the changes to benefit plans to your entire organization. You use the Bulk Send feature to send the plan documents to every employee for their review and acknowledgment.

You create a new envelope, upload the plan files, and then upload a spreadsheet

listing all of the recipients. Each employee receives their own unique copy of the benefits plan details, and can sign the document. You track the completion of all responses to your bulk send envelope, following up as needed.

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[Create a bulk send recipient list](#)

[Send an envelope using bulk send](#)

You must have the appropriate permissions set for your account and your user login in order to use Bulk Send features. If you are not able to follow the instructions in this section, check with your account administrator to see if you have the necessary permissions.

Administrators can [refer to this article](#), which describes how to enable the bulk send feature for users.

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## Create a Bulk Send Recipient List

The bulk send recipient list is a spreadsheet file containing the recipient information for your bulk send document. The file must be formatted as a comma-separated values (CSV) file. You can use any common spreadsheet, database, or plain text editor like Notepad, and save the file in the .csv format.

Once you create your CSV recipient list, you are ready to [Send a Document Using Bulk Send](#).

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[General requirements for the CSV file](#)

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## General requirements for the bulk send CSV file

The following general requirements and specifications must be met to create a valid bulk send CSV file:

- The first row of the file is the header row that must have the field names for the file. Each subsequent row represents a unique recipient with the information for that recipient.
- A bulk recipient file can have a maximum of 1,000 recipients.
- If the value you are adding has a comma or double-quotation marks (“), the value must be enclosed in double-quotation marks (“”). Example: if you have a Title tag and one of the entries is Inside Sales, NE you would type “Inside Sales, NE” in the Title column for that recipient.

**Tip:** If you are using Excel to create your file, you do not need to add commas or double-quotation marks in the columns, just type the information and save the file as a CSV file. Excel will automatically add the double-quotations when you save the file.

- Only certain field names are supported in the bulk recipient file. You must include columns and provide values for recipient **Name** and **Email**. All other columns are optional. See [Supported column headers](#) for more details.
- Information in the CSV file takes precedence over data that a sender adds to a field when sending an envelope or creating a template.
- For multibyte character languages, use UTF-8 with byte order mark (BOM) character codes for the bulk send file.

## Supported column headers

This section presents the required and optional columns, and the type and format of information you can include in the file. Besides the basic recipient information of name and email address, you can specify an authentication method and add notes and other custom information for each recipient in the list by adding it to this file.

- **Name.** The recipient's name. This field and column is required.
- **Email.** The recipient's email address. This field and column is required.
- **Note:** This is a note sent only to the recipient. The text appears as the private message to the recipient, and is included in the email notification and displayed when the recipient accesses your document.

- **AccessCode:** If blank, the recipient is not required to enter an access code before opening the envelope. If a value is provided, the recipient must enter the value as the access code to view and sign the envelope.
- **Identification:** If blank, the envelope does not require any other recipient authentication. If a value is provided, it is the type of authentication used for the recipient. You can use only the authentication methods that are available and configured for your account. The authentication methods you use have additional requirements as follows:
  - **Phone** and **SMS.** You must include the PhoneNumber column and provide valid information as specified.
  - **Live ID.** The recipient must provide a valid Windows Live ID membership. If they do not have a Windows Live ID they can sign up for one.

Values: **Phone, ID Check \$, SMS, and Live ID**

- **PhoneNumber:** This column is only valid, and must be included, if the Identification column is included and contains either **Phone** or **SMS**. The valid values for the PhoneNumber column are as follows:
  - **Phone.** A valid telephone number or “usersupplied”. If “usersupplied” is used, the recipient supplies his or her own telephone number to receive and complete the phone authentication.
  - **SMS.** One or more valid telephone numbers. If multiple phone numbers are provided, the recipient selects which one to use to receive the SMS verification text. Enter multiple phone numbers separated by semi-colons, no spaces. (Ex. 5555555555;1231231234).

**TIP:** For international phone numbers, DocuSign requires the country code be prefixed by a plus sign (“+”). For example, here is an entry for a London number:

	A	B	C	D	E
1	Name	Email	Identification	PhoneNumber	
2	Vinicius P	vinicius.p	Phone	+44 2012345678	
3					

If you plan on creating your CSV file in Excel, enter international phone numbers using the following format:

**[']+[country code][space][phone number]**

**[']** The apostrophe (') forces the cell to a text format so the entry won't be treated as a formula.

**[+]** The plus symbol (+) indicates an international number with a country code to follow.

**[space]** The space makes Excel retain the above formatting if you reopen the CSV file, even though the apostrophe will disappear.

	A	B	C	D	E
1	Name	Email	Identification	PhoneNumber	
2	Vinicius P	vinicius.p	Phone	+44 2012345678	
3					

D2    X    ✓    fx    '+44 2012345678

- **DocuSign Field Name:** You can add a column to set the values of DocuSign fields, which you place on your document. The title of the column must be the same as the DocuSign field Label, as it appears in the tag Properties dialog box. The tag name is not

case-sensitive. The values entered in this column are automatically inserted into the corresponding DocuSign field for the recipient in the same row. DocuSign recommends using the Text field to set field values in the CSV file. The Text field offers an easy and flexible way to set the initial value and allow recipients to input information.

**Limits:** You can use the **Text**, **Drop Down**, and **Note** fields only to set values using the bulk recipient file. You cannot use fields that do not have data or that are automatically populated, such as Signature, Full Name, Email Address, Company, Title, and Date Signed tags.

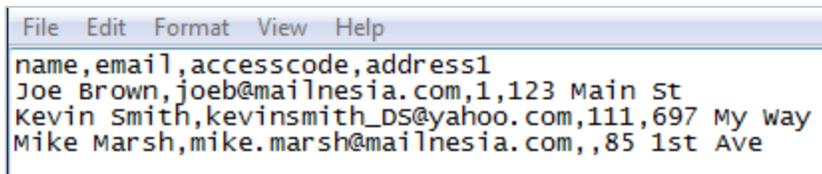
**Example** — You are adding a field to your document for the recipient’s street address. The field Label is “address1”. You want to pre-fill the field with the address when you send the document. You add a column with the column header “address1”, and add the address information in the appropriate row for each recipient.

## Example CSV file

Here's an example of a simple CSV file created in Excel to use as a Bulk Send Recipient list:

	A	B	C	D	E	F
1	Email	Name	Note	AccessCode	Identification	PhoneNumber
2	grich@mailnesia.com	Gregory Barney	Review the requirements section.		Phone	usersupplied
3	fmarshall@mailinator.com	Fred Marshall			ID Check \$	
4	angle@mailinator.com	Abby Angle		3j8R2017		

If you prefer to use a text editor, like Notepad, your file might look like this:

A screenshot of a Notepad window with a menu bar containing 'File', 'Edit', 'Format', 'View', and 'Help'. The text area contains a CSV file with three columns: 'name', 'email', 'accesscode', and 'address1'. The data rows are: 'Joe Brown, joeb@mailnesia.com, 1, 123 Main St', 'Kevin Smith, kevin.smith\_DS@yahoo.com, 111, 697 My Way', and 'Mike Marsh, mike.marsh@mailnesia.com, , 85 1st Ave'.

```
File Edit Format View Help
name,email,accesscode,address1
Joe Brown,joeb@mailnesia.com,1,123 Main St
Kevin Smith,kevin.smith_DS@yahoo.com,111,697 My Way
Mike Marsh,mike.marsh@mailnesia.com,,85 1st Ave
```

You can download a sample CSV file at: <https://app.docusign.com/static/Sample-Bulk-Recipient.csv>. Customize this sample file with your own bulk list recipient data.

## Send Documents Using Bulk Send

Once you [create your bulk send recipient list](#), you are ready to setup and send your documents, using the list. You prepare the envelope as described in [Sending Documents for Signature](#). When you add recipients, you simply select the bulk list you created. The recipient action for all bulk list recipients is Needs to Sign.

You must have the appropriate permissions set for your account and your user login in order to use Bulk Send features. If you are not able to follow the instructions in this section, check with your account administrator to see if you have the necessary permissions.

Administrators can [refer to this article](#), which describes how to enable the bulk send feature for users.

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[Send an envelope to a bulk send recipient list](#)

[Considerations for bulk lists](#)

[Customize bulk send envelopes with recipient info](#)

### To send an envelope using bulk send

1. Start a new envelope as described in [Start an Envelope](#), and add files as usual.
2. To add a bulk list of recipients:
  - a. In the Add Recipients section, click **Import Bulk List**.

**Add Recipients to the Envelope**

As the sender, you automatically receive a copy of the completed envelope.

**IMPORT BULK LIST** **ADD FROM CONTACTS** **SIGNING ORDER**

Set signing order

Name  **NEEDS TO SIGN** **MORE**

Email

**ADD RECIPIENT**

- b. In the Upload Bulk List dialog, click **Upload CSV File** and select your bulk list file. Your file can be stored locally or on a cloud storage account, such as Google Drive.
- c. Review your recipient data and correct any errors presented on the Errors tab in

the import dialog.

**Almost Done Importing Recipients**

There are errors in the list. You can fix these errors below or [upload a new file](#).

**ALL RECIPIENTS (3)**    **ERRORS (1)**

	email	name	accesscode	Note
1	<input type="text"/>	Greg Rich	1	Greg - Owens is ...
2	joeb@mailnesia....	Joe Brown	1	Joe - Please pro...
3	mike.marsh@m...	Mike Marsh	5	Mike - You are p...

**FINISH IMPORT**    **CANCEL**

- d. Click **Finish Import**. Your bulk list recipients are added to the envelope, appearing as a single recipient "Bulk List" with a count of how many recipients are in the list:

**Add Recipients**

As the sender, you automatically receive a copy of the completed documents.

Set signing order

Client MORE ▾

Bulk List (15 recipients)

3. If you need to edit, replace, or download the bulk list file, click the **More** menu.

Customers MORE ▾

Bulk List (3 recipients)

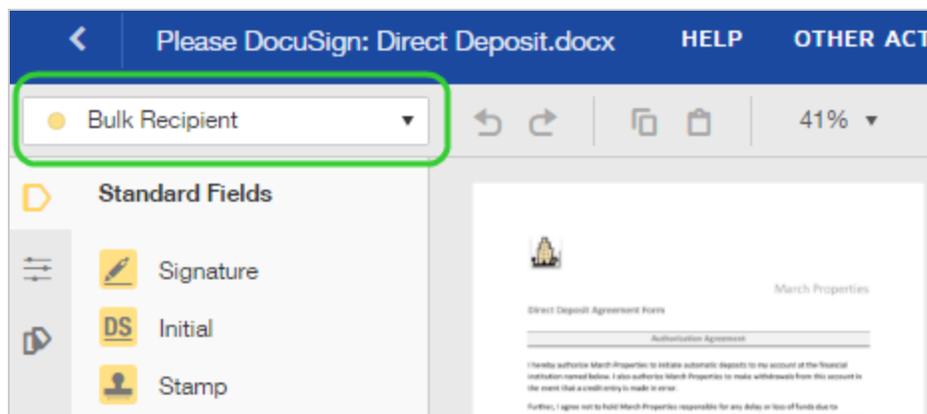
Replace List

Edit List

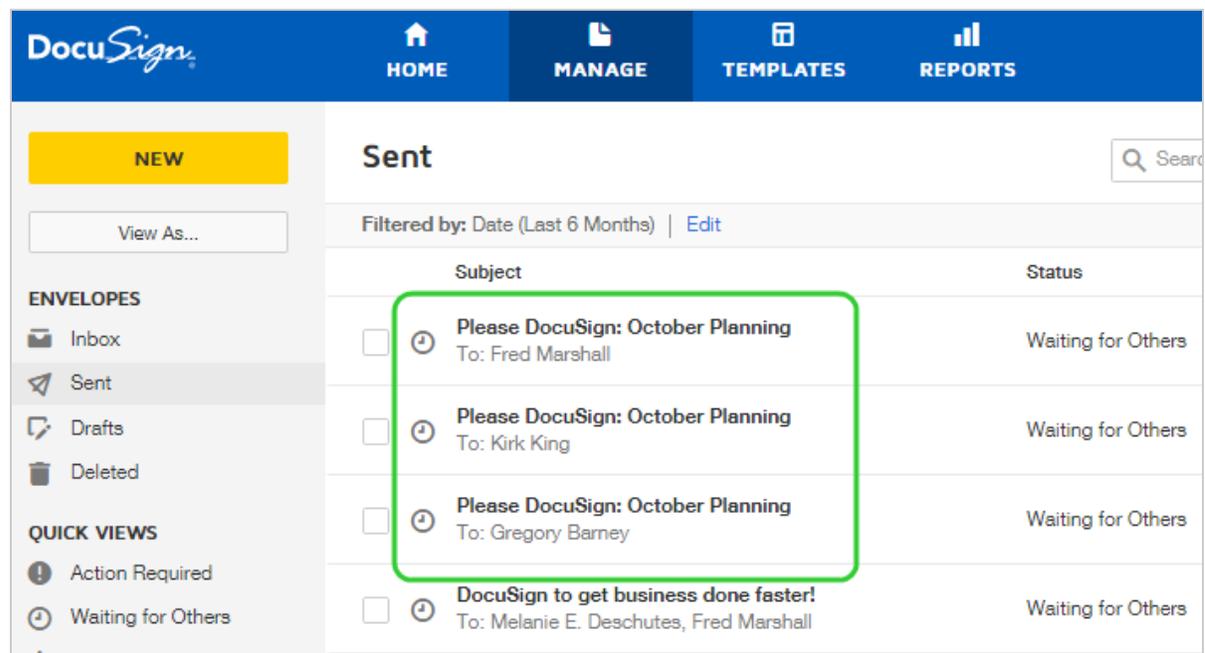
Download List

Add private message

4. To continue preparing your envelope and place fields for your recipients, click **Next**. Bulk list recipients are represented on the Add Fields view as **Bulk Recipient**.



5. Select the Bulk Recipient and add recipient fields. If you defined data in your bulk list that you want inserted into the documents, you must add and set the field's data label to match the column header in your list, as described in [Considerations for bulk lists](#).
6. Send the envelope.  
A separate envelope is sent to each individual listed in your Bulk Send list, and any other individual recipients you added. The envelopes are in your **Sent** folder. You may need to refresh your browser to view your envelopes in the list.



## Considerations for bulk lists

**One bulk list per envelope.** You can add only one bulk list to an envelope, Error checking warns you of formatting or other issues with the entries in your bulk list, helping you to correct any errors in the file.

**Adding other recipients.** You can add individual recipients in addition to the list, but be aware that individual recipients will receive a separate copy of the envelope for each bulk list recipient. So if your bulk list contains 20 recipients and you add an individual recipient as shown below, the individual (Melanie E. Deschutes) is added to each envelope sent to bulk list recipients. Melanie will receive 20 separate envelopes to view and sign. Each bulk list recipient will receive their own envelope to view and sign.

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

Set signing order

 ADD FROM CONTACTS  SIGNING ORDER

Customers MORE ▾

⋮ Bulk List (20 recipients)

Melanie E. Deschutes  NEEDS TO SIGN ▾ MORE ▾

⋮ melanie.deschutes@gmail.com

**Insert data from bulk list into documents.** When you add fields to your documents, you must define and label any fields specified in the bulk list, in order for the data in the list to be inserted into your sent documents.

#### Example — Add Recipient Address

Your bulk list includes the recipient's address in a column labeled "address1" and you want that data to be added to the document, you would add a Text field to the document, and then edit the field's Data Label property to match:

<b>Email:</b>		<b>Data Label</b>
<b>Address:</b>	<input type="text" value="Add text"/>	<input type="text" value="address1"/>
		<b>Validation</b>

**Each bulk list recipient receives their own documents to sign.** A separate envelope is created for each recipient on the bulk list. When you send your envelope, each recipient from the bulk list receives their own documents to sign. So, for example, if you import a bulk list with 35 recipients, when you send the envelope, 35 separate envelope are generated and sent from your account.

**Bulk list recipients are not added to your Contacts list.** When you send envelopes, individual recipients are automatically added to your [Contacts list](#). However, bulk list recipients are not added.

## Customize bulk send envelopes with recipient name or email address

When you use bulk send, the envelopes for the bulk list recipients are all titled the same, making it hard to identify a particular one. You can create a template and add your bulk list as a recipient, and then apply merge fields to the message subject to customize each document with the recipient name or email address.

To send to your bulk list, you use the template you created. You can send to the list as is, or you can edit or even replace the list.

[More info...](#)

## Bulk Send for Multiple Recipients

DocuSign's enhanced Bulk Send feature allows senders to easily send a standardized document to many recipients at one time. This can be particularly convenient for transactions where a formal acknowledgment may be required (e.g., new company policies), when mass notifications take place, or a myriad of other use cases where the same document needs to be sent out to a large group.

Though Bulk Send can be powerful in its simplicity, the ability to email hundreds or even thousands of recipients with the click of a button opens senders to some risk. It is important to leave time for adequate preparation and testing before executing a bulk send to make sure everything is in order. Taking the extra time to pilot a bulk send to a small group of test recipients before using the full and final recipient list helps catch potential errors and inconsistencies in the eventual signing experience.

**Note:** This topic covers the new bulk send supporting multiple recipients, more recipient types, and envelope custom fields. If you are using the previous version of bulk send, see [Using Bulk Send](#) for more information.

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[Prepare your template for the bulk send](#)

[Prepare your documents to accommodate data from bulk recipient file](#)

[Generate a customized CSV file for the bulk recipient list](#)

[Recipient authentication information](#)

[Bulk send from a template](#)

You must have the appropriate permissions set for your account and your user login in order to use Bulk Send features. If you are not able to follow the instructions in this section, check with your account administrator to see if you have the necessary permissions.

Administrators can [refer to this article](#), which describes how to enable the bulk send feature for users.

## Prepare your template for the bulk send

When using the new multiple recipient bulk send, begin by preparing the template that will be used for the bulk send. Prepare your template as usual, adding the required document (s).

### Recipients

Add one or more role recipients. Role names can include spaces and the supported recipient types are: Needs to Sign, Receives a Copy, Needs to View, Specify Recipients, and Update Recipients. Role recipients are designed to be filled in when you import your bulk list.

You can add named recipients in addition to the role recipients, but be aware that individual recipients will receive a separate copy of the envelope for each bulk list entry. So if your bulk list contains 20 entries and you add a named recipient, the individual is added to each of the 20 envelopes sent to bulk list recipients.

### Authentication

For authentication, the process is similar to the prior version of bulk send. The Access Code, SMS or Phone required to authenticate the recipient is not included in the template; the authentication information is entered in the bulk recipient CSV file directly. See more about authentication in the section [Recipient authentication information](#).

### Envelope Custom Fields

If your template contains envelope custom fields, the bulk recipient CSV file can specify these field values for each bulk send envelope. For envelope custom fields, bulk send accepts only text string entries; list values are not supported.

If you specify values in the CSV file, these entries override any envelope custom field entries made directly on the envelope.

### **Messages**

Add the message subject (with merge fields if desired), and the message for all signers.

If you want to include a private message, you can add a 'dummy' private message to your template role recipients, but best practice is to add the Role::Note column to your bulk list CSV with the private message entries you want to include.

### **Recipient Fields**

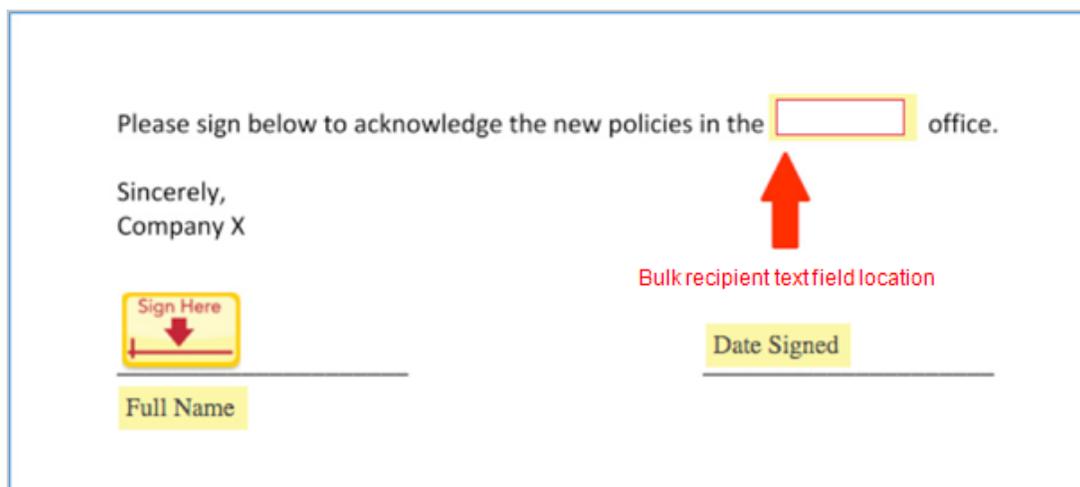
Include recipient fields on template documents as usual. As with the prior version of bulk send, to specify values for Text, Drop Down, and Note fields, change the Data Label for the fields to a meaningful string and insert a column with the same string in the CSV file, prefaced with the recipient role name (e.g., Role::data label).

### **Prepare your documents to accommodate data from bulk recipient file**

When using bulk send, you prepare a bulk recipient comma-separated values (CSV) file with the recipient and envelope information specified by your template. This file lists, at a minimum, the name and email address of each recipient role defined on the template. However, the file can also contain additional columns with customized information to be populated on the documents for each bulk send recipient. When preparing the template documents to be used for bulk send, you should consider which language or information will be the same for all recipients, and which information you want to customize. When preparing the document outside of DocuSign, be sure to leave an appropriate amount of blank space where the personalized data will go.

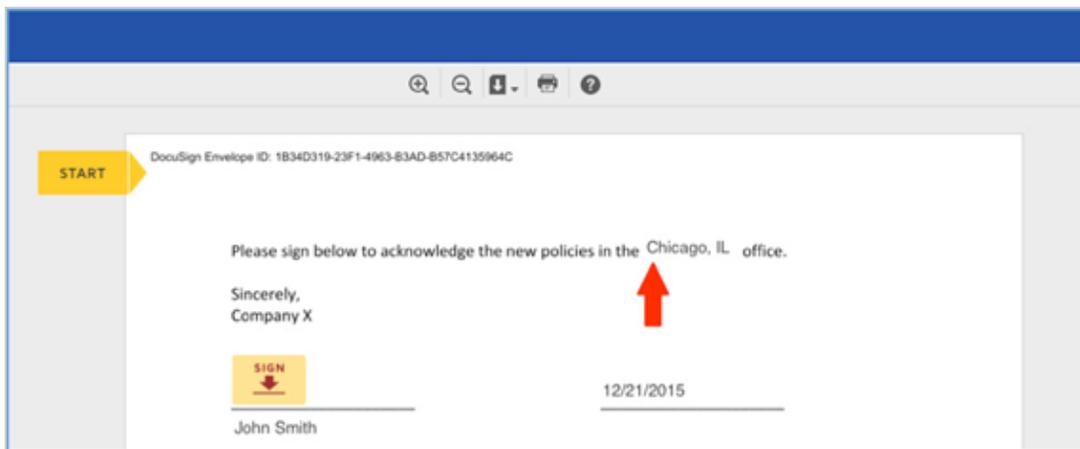
For instance, let's say you are sending envelopes to recipients in various office locations and you want to include a personalized location in the document. You include a "Role::Location" column in your Bulk Recipient CSV listing the office location for each recipient. In your template document, you placed a text field and set the field's data label to "Location". In your original source document, you left sufficient space to accommodate the longest possible value from the CSV. See images 1.1 and 1.2.

### 1.1 – Bulk Recipient CSV File and Template Text Field

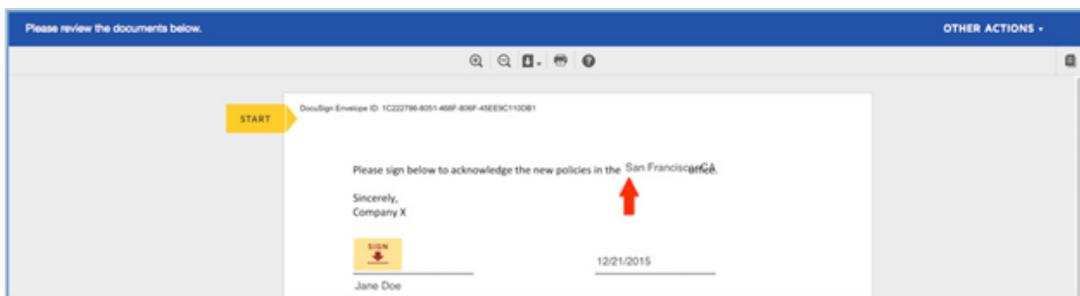


### 1.2– Recipient Documents

In John's version of the document, his location of "Chicago, IL" fits nicely in the space left for the Text field.



However, Jane’s location of “San Francisco, CA” takes up more space, and overlaps with the text that comes after it.



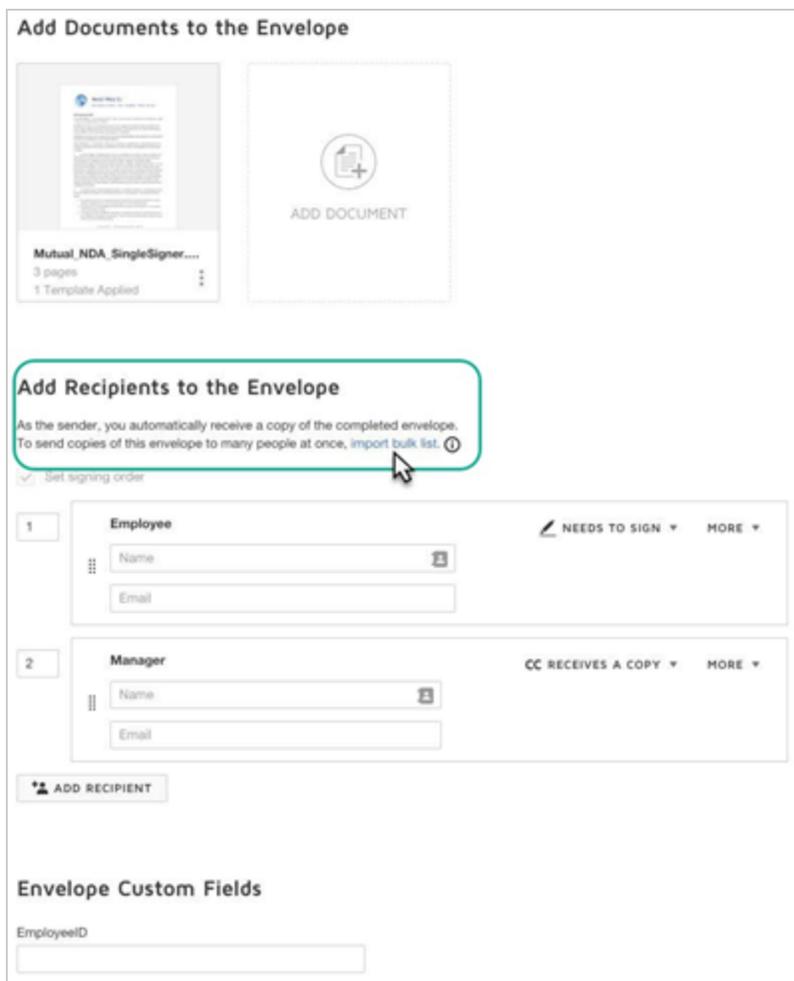
The space left in the document needs to accommodate that LONGEST value that will be imported from the CSV, which means there may be some extra blank space around shorter values.

## Generate a customized CSV file for the bulk recipient list

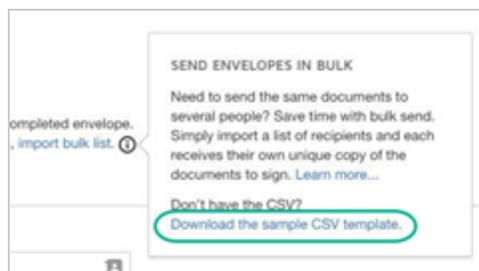
Once you have your template ready, if you need help preparing a bulk recipient file, you can generate a sample CSV file that is pre-populated with the columns needed to support the template. Bulk recipient CSV files can be challenging to configure correctly, particularly if there are many recipients, envelope custom fields, and fields that will be populated from the CSV. The new bulk send flow allows you to generate a customized CSV file that shows the data from the template that needs to be completed.

### To generate a customized bulk recipient CSV file

1. From the prepared template, click the **USE** button to start a new envelope.
2. Click **ADVANCED EDIT** to access the full Prepare stage of the new envelope:



3. In the Add Recipients to the Envelope section, locate the link to import bulk list and hover over the (i) icon to open a tool tip.



- Click the **Download the sample CSV template** link to generate a CSV file that is customized to the envelope:

	A	B	C	D	E	F
1	Employee::Name	Employee::Email	Manager::Name	Manager::Email	EmployeeID	Employee::Company
2						
3						
4						

- The generated CSV shows the Role::Field pair for each recipient role on the envelope. In this case, we have a template with two role recipients: "Employee" and "Manager", with the Employee getting custom data added to a document field called 'Company'. The EmployeeID column that does not have a Role assigned is an envelope custom field. This is the only column that is not related to a recipient, but to the envelope as a whole.

**Envelope Custom Fields**

EmployeeID

6. Fill in the column data as required.
  - To include access and authentication for recipients, see the section [Recipient authentication information](#).
  - To customize envelopes and prefill data into specific document fields, insert columns with the recipient role name and data label pairs. (e.g., Role::data label).

When your bulk recipient list is completed, you are ready to [bulk send from a template](#).

## Recipient authentication information

As a general best practice, if you want to add an Access Code, SMS, Phone or KBA authentication, you include it manually in the generated CSV by inserting columns as follows:

- **Access Code.** Include the following column for each role recipient.
  - **Role::AccessCode.** If blank, the recipient is not required to enter an access code before opening the envelope. If a value is provided, the recipient must enter the value as the access code to view and sign the envelope.
- **ID Check.** Include the following column for each role recipient.
  - **Role::Identification.** If this column remains blank, the envelope does not require any other recipient authentication. If a value is provided, it is the type of authentication used for the recipient. Value: ID Check
- **SMS/Phone.** These authentication methods need two different columns, one for each role recipient, indicating the authentication type, and one for the phone number.
  - **Role::Identification.** If this column remains blank, the envelope does not require any other recipient authentication. If a value is provided, it is the type of authentication used for the recipient. A user can use only the authentication methods that are available and configured for their account. Possible values: SMS/Phone

- **Role::PhoneNumber.** This column is only valid, and must be included, if the Role::Identification column is included and contains either Phone or SMS. The valid values for the PhoneNumber column are as follows:
  - **Phone.** A valid telephone number or “usersupplied”. If “usersupplied” is used, the recipient supplies his or her own telephone number to receive and complete the phone authentication.
  - **SMS.** One or more valid telephone numbers. If multiple phone numbers are provided, the recipient selects which one to use to receive the SMS verification text. Enter multiple phone numbers separated by semi-colons, no spaces. (Ex. 5555555555;1231231234).

## Bulk send from a template

Once your bulk recipient CSV file is ready, you can use your template to generate a bulk send envelope.

1. From the prepared template, click the **USE** button to start a new envelope.
2. Click **ADVANCED EDIT** to access the full Prepare stage of the new envelope
3. In the Add Recipients to the Envelope section, click the **Import a bulk list** link to import and upload your prepared CSV file.

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list.](#) Send copies of this envelope to many people at once. 

## Sending using Digital Certificates

DocuSign offers digital certificates as part of its Standards-Based Signatures platform. Using digital certificates during signing provides higher levels of identity authentication and document transaction security.

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### What are digital certificates?

Digital certificates use cryptography to prove the identity of a signer and integrity of a document. This cryptography uses Public Key Infrastructure (PKI) technology to issue certificates based on X.509 standards. A trusted third-party, known as a Certificate Authority (CA), performs identity-proofing and issues certificates to represent the digital identity of a signer. When the signer uses a certificate to digitally sign a document, other people (known as relying parties) can trust the digital signature because they trust the CA has done their part to ensure the signer matches their digital identity.

Standard-Based Signatures is DocuSign's platform for providing a full range of signature capabilities using digital certificates. If you are a regulated multinational or European Union customer in the financial services, insurance, life science and other regulated industry, Standard-Based Signatures are the easiest way to move forward with electronic signature solutions in what can be a complex and confusing process.

## What signature types does DocuSign support?

1. **Electronic Signature** -The most common type of e-signature and used by the majority of DocuSign customers. It does not require ID proofing to complete and does not apply digital certificates to the transactions.
2. **Express Signature** - Similar to the DocuSign Electronic Signature with additional security as a digital certificate is applied to the transaction.
3. **EU Advanced Electronic Signature** - Used in cases where additional user validation is required. Sender is required to verify the identity of the signer. A digital certificate is generated as part of this transaction. See section below for more about [EU Advanced Electronic Signatures](#).

## Requiring digital certificates during signing

If you are doing business in an industry or region of the world that demands digital signatures, you can leverage DocuSign's expanded digital signature capabilities. With these capabilities, senders can require signers to apply DocuSign-backed or third-party digital signatures. All DocuSign digital signatures are PKI standards-based, fast to deploy, and easy to use as well as being fully integrated with our industry-leading Digital Transaction Management (DTM) platform.

In addition to requiring the signer to generate a digital signature by applying a supported digital certificate, once an envelope is complete you can view the completed envelope documents and check the validity of the digital signature.

Upon completion of the signing process, PDF documents are digitally signed with EU PAdES standard to guarantee integrity and traceability.

## What is an Express Signature?

Part of DocuSign's Standards-Based Signature portfolio, Express Signature is a digital signature that ensures PKI standard and X509-compliance for any transaction. Express Signature differs from EU Advanced Standards-Based Signatures in that it does not require identity proofing.

## Sending a document using Express Signature

1. Start a new envelope as described in [Start an Envelope](#), and add documents as usual.
2. Add the recipient or recipients who will sign the documents.
3. Under the **More** dropdown, choose **Select signature type**.
4. Under the **Select signature type** dropdown, select **DS Express**.

The screenshot shows a recipient configuration form. At the top, there is a checkbox labeled "Set signing order". Below this are two input fields: "Name" and "Email". The "Name" field has a small person icon on the right and a pencil icon on the far right. Below the "Email" field is a section titled "Select signature type" with a pencil icon on the left. A dropdown menu is open, showing two options: "DS Electronic" and "DS Express", with "DS Express" selected and marked with a checkmark. At the bottom of the form is a button with a plus icon and the text "ADD RECIPIENT".

5. Add additional recipients to the recipient list as needed for your transaction.
6. Complete the sending portion of the transaction as referenced in [Sending Documents for Signature](#).

### What does the signer see when they receive an EU Advanced Signature?

The signer will see an additional dialog appear that they will need to accept in order to complete an express signature.

## Signing with DocuSign Express

To finish signing your document with a DocuSign Express certificate, please agree to the following terms.

I agree to the [DocuSign Express Subscriber Agreement](#) terms

**CONTINUE** CANCEL

## What is an Advanced Electronic Signature?

Advanced Electronic Signatures are one of the three levels of electronic signatures that were released as part of the EU regulation 910/2014, also known as eIDAS.

Advanced Electronic Signatures differ from the Electronic Signature in that they require the following:

- are uniquely linked to the signer
- are capable of identifying the signer
- are created using electronic signature creation data that the signer can, with a high level of control, use under their sole control
- are linked to the data signed therewith in such a way that any subsequent change is detectable

Advanced Electronic Signatures link the signer to the document by issuing a digital certificate. This also binds the signer identity with the certificate. This is only generated

after it has been enforced authentication through issuing a second code through SMS or through a sender generated access code. DocuSign supports Advanced Electronic Signatures through our EU Advanced Electronic Signature product as well as supporting other Trust Service Providers (TSPs) who provide a similar service.

## What steps are required before you can use the EU Advanced Signature?

Before using the EU Advanced Signature, an account must sign documents to ensure they comply with the requirement that they become a Registration Authority.

A Registration Authority (RA) is responsible for verifying the identity of the signers and maintaining the proper documentation.

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## Sending using DocuSign EU Advanced

1. Start a new envelope as described in [Start an Envelope](#), and add documents as usual.
2. Add the recipient or recipients who will sign the documents.
3. Under the **More** dropdown, Choose **Select signature type**.

### Add Recipients

As the sender, you automatically receive a copy of the completed documents.

Set signing order

Name  

Email

 **ADD RECIPIENT**

 **NEEDS TO SIGN** ▼ **MORE** ▼

-  Select signature type
-  Add access authentication
-  Add private message

4. Under the **Select signature type** dropdown, select **DS EU Advanced**.

### Add Recipients

As the sender, you automatically receive a copy of the completed documents.

Set signing order

Name  

Email

 **Select signature type** Done Discard

- DS Electronic
- DS EU Advanced

 **ADD RECIPIENT**

5. Select an authentication method that you will use to ensure the authenticity of the signer.

- For **Access Code**, enter a code that only the signer knows.

**Add Recipients**  
As the sender, you automatically receive a copy of the completed documents.

Set signing order

Name  NEEDS TO SIGN ▼ MORE ▼

Email

Select signature type Done Discard

DS EU Advanced  Access Code SMS

A green arrow points to the 'Access Code' option in the signature type dropdown menu.

- For **SMS**, select the international prefix and enter the cellular number for a text-enabled device.

Set signing order

Name  NEEDS TO SIGN ▼ MORE ▼

Email

Select signature type Done Discard

DS EU Advanced  SMS

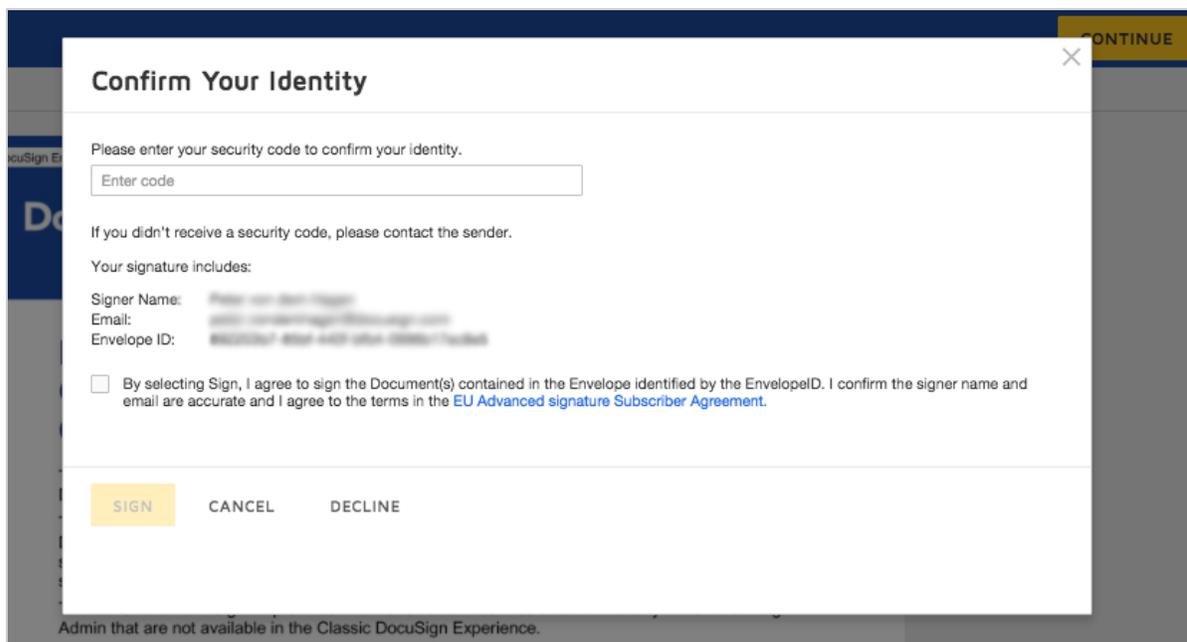
A green arrow points to the 'SMS' option in the signature type dropdown menu.

6. Add additional recipients to the recipient list as needed for your transaction.
7. Complete the sending portion of the transaction as referenced in [Sending Documents](#).

## What does the signer see when they receive an EU Advanced Signature?

When a signer is sent a document to sign using DocuSign EU Advanced Signature, they will follow the standard [signing experience](#). However they will have to complete an identity confirmation dialog to finish the signing transaction.

1. Enter the security code that you received previously from the sender of the document or that you received via SMS.
2. Select the **check box** to confirm.
3. Click **Sign** to complete the signing.



**Confirm Your Identity** × CONTINUE

Please enter your security code to confirm your identity.

If you didn't receive a security code, please contact the sender.

Your signature includes:

Signer Name: John Doe  
Email: john.doe@example.com  
Envelope ID: 12345678901234567890

By selecting Sign, I agree to sign the Document(s) contained in the Envelope identified by the EnvelopeID. I confirm the signer name and email are accurate and I agree to the terms in the [EU Advanced signature Subscriber Agreement](#).

SIGN CANCEL DECLINE

Admin that are not available in the Classic DocuSign Experience.

## Viewing certificate info in completed envelopes

There are several ways to see that a digital certificate is applied to an envelope.

When viewing the document in the New DocuSign Experience Detail view, a digitally signed icon and text appears adjacent to the signer information. The icon and text used varies depending on how the document was signed.

In the document History, there is an entry each time a digital certificate is applied.

In the Certificate of Completion, there are four entries in the Signer Events section that show Digital Certificate information.

- The Signer Certificate Applied entry shows the Certificate Authority for the digital certificate
- The Signer Certificate Type entry provides information about the type of digital certificate that was applied

Opening the document with a PDF reader and click on icon adjacent to signatures with digital certificates to see more information about the certificate that was applied.

The information is shown for each signer, but the validity of signer signatures might appear as 'unknown' unless you have trusted the certificate. The DocuSign signature, which is the last item in the list, is always valid.



### Signatures ✕

---

 **Validate All**

---



▶  **Rev. 1: Signed by TEST EU Advanced <frankstuart@live.com>**

▼  **Rev. 2: Signed by DocuSign, Inc. <techops@docusign.com>**

Signature is valid:

- Source of Trust obtained from Adobe Approved Trust List (AATL).
- Document has not been modified since this signature was applied
- Signer's identity is valid
- Signing time is from the clock on the signer's computer.
- Signature is not LTV enabled and will expire after 2018/12/20 11:40:09 -07'00'

▼ **Signature Details**

- Reason: Digitally verifiable PDF exported from www.docusign.com
- Location:  
[Certificate Details...](#)
- Last Checked: 2017.03.29 12:42:34 -07'00'
- Field: ENVELOPEID\_52FA59703D0D4696BEC867FEB4134F95 (invisible signature)

**Document Locked by ENVELOPEID\_52FA59703D0D4696BEC867FEB4134F95**

Additionally, selecting **Certificate Details** shows the Signature and X.509 information for the completed envelope PDF.

**Certificate Viewer**

**This dialog allows you to view the details of a certificate and its entire issuance chain. The details correspond to the selected entry.**

Show all certification paths found

- ▼ Entrust.net Certificat
- ▼ Entrust Class 3 Cl
- DocuSign, Inc.

**Summary**   Details   Revocation   Trust   Policies   Legal Notice

 DocuSign, Inc. <techops@docusign.com>  
DocuSign, Inc.

Issued by: Entrust Class 3 Client CA - SHA256  
Entrust, Inc.

Valid from: 2016/10/24 11:10:12 -07'00'  
Valid to: 2018/12/20 11:40:09 -07'00'

Intended usage: Digital Signature, Non-Repudiation, Encrypt Keys, Document Signing, 2.16.840.1.114027.40.11

[Export...](#)

## zipForm Plus and DocuSign

You can use the New DocuSign Experience to sign your zipForm® Plus forms. This DocuSign video tutorial shows how to use zipForm Plus with DocuSign:

[Click here to watch video](#)

### Register your DocuSign account credentials in zipForm Plus

To use zipForm Plus with DocuSign, you must first register your DocuSign account credentials in zipForm Plus. You only need to do this once, but if you ever change your DocuSign credentials, such as changing the email address or password on the account, you will need to update your credentials in your zipForm Plus account.

1. In your zipForm Plus account, click the drop-down arrow by your name and select **Profile**.
2. In the left pane, select **Settings**.
3. Under E-Signature Options, select **DocuSign** and enter your DocuSign email address and password.
4. Click **Save**.

### Send a zipForm form for signature

Sending a zipForm form for signature is easy. From your zipForm Plus account, simply select the documents to sign, add the signers' information, and then add the DocuSign fields to your documents.

Please refer to the training video for further details on esigning zipForm transactions, or visit our [zipForm Support articles](#) for troubleshooting and other tips.

## The Signing Experience

So you've put together your envelope and sent it off to the recipients for their signature. What is the signing experience? How do your documents appear to them? Where do the messages and fields you added show up and how does the signer DocuSign and complete your electronic signature transaction?

In addition to this guide, we offer more support articles for signers on our website at [DocuSign Support - Help With Signing](#).

For your recipients, this is a good article to help walk them through the signing process: [How do I sign a DocuSign document?](#)

### Typical signing scenario

Now let's walk through a typical signing scenario:

#### **SCENARIO — Signing a Document**

You manage a small apartment building and you have a new prospective tenant, Grant England. You prepare and send a rental agreement to Grant for his signature. You also send a Lead Paint Disclosure form, which Grant must acknowledge. You've got a waiting list for the open unit and if Grant's not going to take it, you need to move on to the next applicant, so you want the agreement completed within five days. You set document options to send a reminder to Grant every day,

and you set an expiration date for the document for five days from today. You explain this deadline to Grant in your document message.

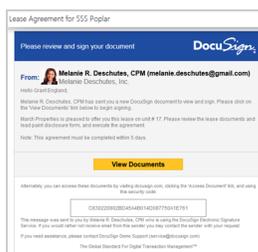
The building's owner, Lissa Burnky, wants copies of all completed rental agreements. You add Lissa as a copy only recipient to your document. You use the Sign in Order feature so that Lissa receives the document only after Grant signs it. You add a private note to Lissa, explaining that Grant passed the credit and reference checks.

Here are the steps in the signing experience for this scenario. Screen shots show you in detail what your recipients see.

1. Your prospective tenant, Grant, receives an email notification from you through DocuSign.

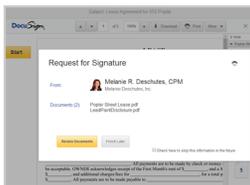


Grant opens the email.

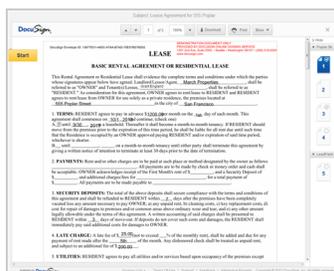


The notification includes your photo, name, email, and company name. The subject of the email is the Email subject you entered in the Message. Grant decides he's not ready to sign the lease just yet.

2. A day later, Grant receives a reminder to sign your document, and now he's ready to sign the lease, Grant's ready to sign the lease, so he clicks the **View Documents** link. Even though Grant does not have a DocuSign account, he can view and sign your document.
3. The Request for Signature dialog appears. This dialog includes:
  - The files names of the lease and lead paint disclosure agreements which you included in your document
  - The Consumer disclosure statement
  - Buttons to Review Documents, Decline, Finish Later



4. Grant checks the box to agree to do business electronically and clicks **Review Documents**. Your document appears with the signing fields.



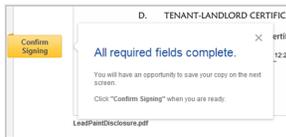
5. Grant begins to step through the signing fields, first confirming his signing name and choosing a signature style.



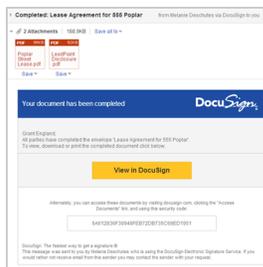
- Grant notices that you already signed the document. He hovers his mouse over your signature and reviews your signature ID card.



- Grant finishes all the signing actions and confirms the signing.



- Grant receives an email notification that the document is complete. The notification includes the completed, tamper-sealed PDF as an attachment.



9. Lissa Burnky, the property owner, receives an email notification that your document is complete and ready for her to view. The email includes the signed forms as attachments, and the private message you sent to Lissa appears on the document.

## DocuSign eNotary Resources: Supported States and Available Documentation

This guide presents the list of states that support electronic notarization and summaries for each state, plus a list of available documentation on eNotary.

The DocuSign eNotary summaries are based on research into the laws and regulations regarding electronic notarization on a state-by-state basis, and are not intended to provide guidance on specific state requirements, including qualifications of a notary and practices of electronic notarization. The research for each state was conducted by a national law firm in the United States. This information is provided as a public resource to understand electronic notary laws. These summaries are not a substitute for professional legal advice.

### List of supported states and eNotary summaries

- [Washington](#)
- [Florida](#)

- [Texas](#)
- [North Carolina](#)
- [New York](#)
- [New Jersey](#)
- [Idaho](#)
- [Indiana](#)
- [Kentucky](#)

## Available eNotary Documentation

- [Requesting Electronic Notary Service](#) - How to prepare and send an envelope with a request for a notary to witness the electronic signature.
- [A Guide for Notaries](#) - How to electronically notarize documents.
- [Electronic Notary Profile](#) - How a notary creates their electronic notary profile in DocuSign, and uses the Notary Journal to review their DocuSign eNotary transactions.
- [Signing with a Notary](#) - Step-by-step instructions on how to sign documents with a notary.

## A Guide for Notaries: How to Electronically Notarize Documents

Notaries in select jurisdictions can use DocuSign eNotary to electronically notarize documents. This topic is for notaries and explains the requirements to set up your DocuSign account and complete an electronic notary session.

**Note:** In accordance with the [Notary Terms and Conditions](#), the sender of the envelope and notary are responsible for ensuring that electronic notarization is acceptable for the specific jurisdiction and document.

## How DocuSign eNotary works

DocuSign eNotary enables in-person electronic notarization of documents. With DocuSign eNotary, recipients can be required to sign electronically at an in-person signing session with a Notary Public. The notary adds her electronic notary credentials to the document, witnessing the signature. Notary signing sessions are automatically recorded in the Notary Journal in the notary's DocuSign account.

## What do you need to do when you receive an electronic notary service request?

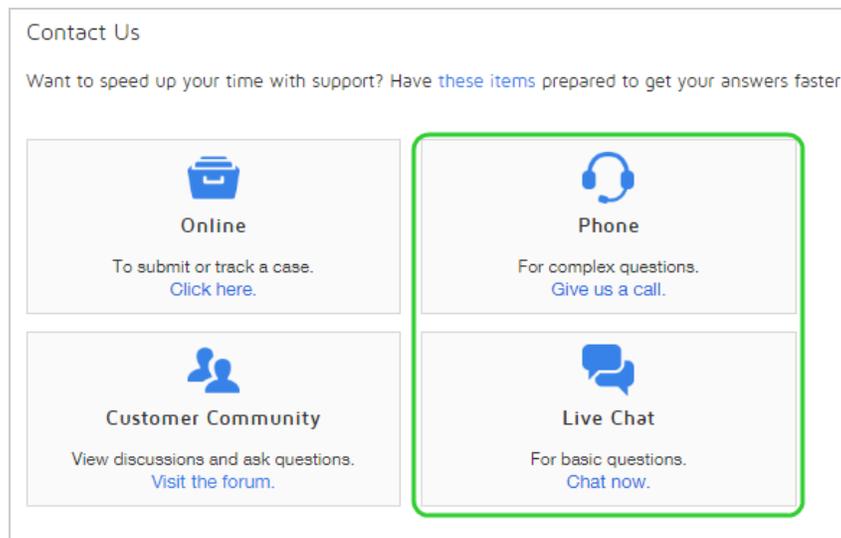
If you receive an email notification to act as a notary and witness an electronic signature, here are the steps to complete your account setup and the electronic notary session with the signer:

### 1. Activate your DocuSign account

When someone sends an envelope and adds you as a notary, if you do not already have a DocuSign account, one is created for you and you must activate it.

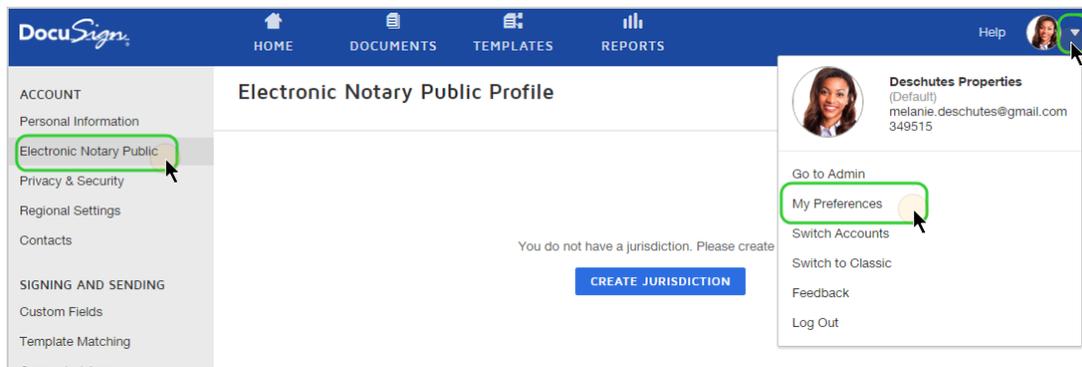
1. In your email account, locate the activation email from DocuSign and click the **Activate** link.
2. Follow the steps to complete your account activation.

**Note:** If you cannot locate the activation email, please contact DocuSign Support for assistance. Go to <https://support.docusign.com/en/contactSupport>, select the prompts for assistance with something else, and use either the phone or chat option to contact Customer Support:



## 2. Register as an electronic notary public

In your activated DocuSign account, you add a profile with your notary jurisdiction and credential details to use for the electronic notary session. Follow the steps in [Electronic Notary Profile](#) to complete your electronic notary profile. Your profile information is used in the signing session.

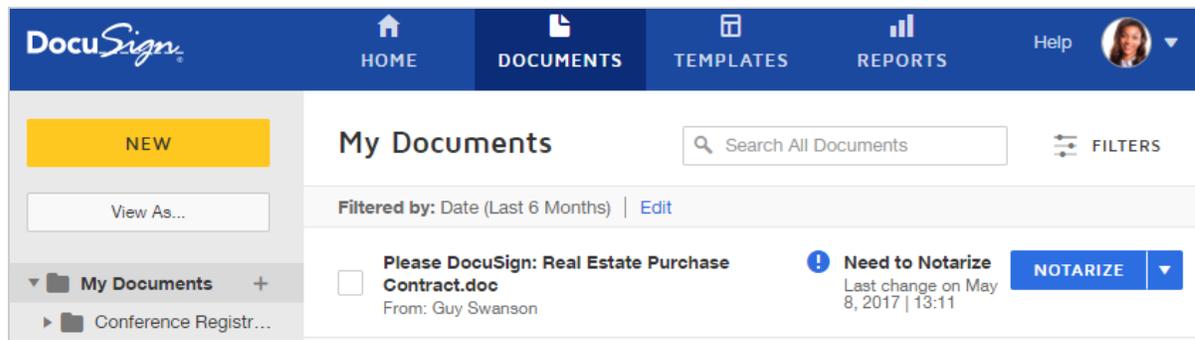


Before continuing, make sure your notary credentials are correct and that the expiration date is a valid future date.

### 3. Conduct the electronic notary service with the signer

Meet with the signer and together you start the session and complete the signing process. You can start the session from within your DocuSign account or from the email notification you received. (The signer receives a similar notification, which allows them to preview the documents in a read-only session.)

1. Arrange to meet in person with the person who is signing the documents.
2. At the meeting, log in to your DocuSign account and locate the envelope containing the documents to be notarized.



3. Click **NOTARIZE** to start the session.

Alternatively, you can use the DocuSign email notification you received requesting an electronic notary service, and click the link in the email notification to start the session.

4. For detailed information on the signing session, see [Signing with a Notary](#).

#### 4. View the details of the signing session in your DocuSign Notarial Journal

After you successfully complete an electronic notary session, the details of the transaction are automatically captured in your DocuSign Notarial Journal, including the signer's name and signature.

The Notarial Journal is available from your Electronic Notary Public Profile. See "The Notarial Journal" in [Electronic Notary Profile](#) for more information.

## Requesting Electronic Notary Service

Notaries in select jurisdictions can use DocuSign eNotary to notarize documents as part of a DocuSign electronic signature transaction. This topic explains how to prepare and send an envelope with a request for a notary to witness a recipient's electronic signature, and how to monitor the transaction process.

**For information on which states DocuSign eNotary supports:** [DocuSign eNotary](#)

## Resources

### CONTENTS

[How it works](#)

[Limitations](#)

[To send an envelope with a notary request](#)

[To mark pages for a notary's attention](#)

[To monitor progress - Envelope details and Certificate of Completion](#)

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## How it works

Sending an envelope with a request for electronic notary service is similar to the standard procedure for sending documents for signature. For recipients whose signature requires notarization, you use the **Signs with Notary** recipient action and provide the name and email address for the notary.

### Add Recipients

As the sender, you automatically receive a copy of the completed documents.

☰ IMPORT BULK LIST    👤 ADD FROM CONTACTS  
📄 SIGNING ORDER

Set signing order

ⓘ  
  
 ⓘ

▾    MORE ▾

Signs with Notary recipients are required to sign electronically at an in-person signing session with the specified Notary Public. The notary adds her electronic notary credentials to the document, witnessing the signature. Notary signing sessions are automatically recorded in the Notary Journal in the notary's DocuSign account.

The notary must have a DocuSign account. If the notary does not have an account, then one is automatically created for her.

**For more information for notaries:** [A Guide for Notaries](#)

The signer and the notary each receive an email notification informing them of the request to sign with a Notary. The Signer can review the documents, but cannot initiate the signing process. The notary meets with the signer and initiates the signing process from either his email notification or Documents list.

**For more information on the signing process:** [Signing with a Notary](#)

**Note:** In accordance with the [Notary Terms and Conditions](#), the sender of the envelope and notary are responsible for ensuring that electronic notarization is acceptable for the specific jurisdiction and document.

## Limitations

The following restrictions apply when sending a document with an Electronic Notary request:

- The following [advanced document options](#) cannot be used:
  - Sign on paper
  - Change signing responsibility
  - Edit the document (document markup)
- The sender cannot assign fields for notaries; notaries use free-form signing to add their notarial seal or certificate, and other necessary details.
- You cannot use a signing group or a bulk list for the signer.
- The signer cannot be designated as a [fax recipient](#).
- DocuSign mobile apps do not yet support electronic notary signing sessions.

## To send a document with a notary request

1. Start a new envelope as described in [Start an Envelope](#), and add documents as usual.
2. Add the recipient whose signature requires a notary witness and set their action to **Signs with Notary**.

The screenshot shows a recipient card for Fred Marshall with the email fmarshall@mailinator.com. A dropdown menu is open, showing options: Needs to Sign, In Person Signer, Receives a Copy, Needs to View, Specify Recipients, Allow to Edit, Update Recipients, and Signs with Notary (highlighted). Below the card is an 'ADD RECIPIENT' button and a 'Document Labels' section with 'Code' and 'Declined Reason' dropdowns.

3. In the notary fields that appear, enter the notary's name and email address.  
If you do not know the notary's identity, you can add a manager recipient, either **Specify Recipients** or **Update Recipients**, to fill in the notary's information.

The screenshot shows two recipient cards. Card 1 is for Elisabeth Schreiber (schreiberlabs@gmail.com) with 'SPECIFY RECIPIENTS' selected. Card 2 is for Fred Marshall (fmarshall@mailinator.com) with 'SIGNS WITH NOTARY' selected. Card 2 also has fields for 'Notary Name' and 'Notary Email'. A 'Set signing order' checkbox is checked at the top.

4. Finish preparing your envelope with additional recipients, messages, and fields for signers.

5. To help ensure the notary applies their seal or other information, use the Notarize Page field to [add a notification at the top of the page for the notary](#).

6. Send the envelope.

The notary receives a notary service requested email, which they can use to start the signing process once they are with the signer. The signer also receives an email, and they can review the documents they are being asked to sign, but they cannot start the signing process.

## Mark pages for a notary's attention

To help ensure the notary attends to certain pages within your document, use the Notarize Page field. This special field is available only for a Signs with Notary recipient. By adding the Notarize Page field to a page, when the notary opens the document they are directed to each page so marked. The notification appears at the top of the page only for the notary; no one else can see the indicator. To satisfy the Notarize Page field, the notary must add at least one field to the marked page.

1. Prepare your envelope as usual, adding a **Signs with Notary** recipient.
2. As you add fields for your Signs with Notary recipient, for any page which you want to highlight for the notary's attention:
  - a. Select the **Notary Fields** tab.
  - b. Click and drag the **Notarize Page** field onto the page you need the notary to notarize.
  - c. By default, the Notarize Page action is required; you can clear the **Required Field** property to make it optional.

### 3. Send the envelope.

When it is the notary's turn to sign, for each page you marked with the Notarize Page field, there is an indicator at the top left of the page instructing the notary to add at least one field.

To monitor the transaction process

- **Envelope Details.** The details view lists both the signer and the notary and provides the envelope and recipient status:

## Please DocuSign: Residential Property Agreement - 123 Spring St. ⓘ

Last change on 8/3/2017 | 04:48:49 pm

✓ **Completed**

[MOVE](#) [MORE ▾](#) [↓ ▾](#) [🖨️](#)

---

### Recipients 📄 SIGNING ORDER

✓ **Fred Marshall**  
fmarshall@mailinator.com

🔒 **Signed with Notary**  
on 8/3/2017 | 04:47:09 pm

🔒 **Notary: Melanie E. Deschutes**  
(melanie.deschutes@gmail.com)

- **History.** The envelope history records all of the signing activities, including the notarization events. If the notary chooses to attach a certificate form, the activity is recorded as "Uploaded Attachment".

Envelope and Document History				
8/3/2017   04:46:53 pm	Fred Marshall (English (US)) [web:12.202.171.34]	Viewed	Fred Marshall viewed the envelope [documents:(Blank Document.docx)]	Sent
8/3/2017   04:47:09 pm	Fred Marshall (English (US)) [web:12.202.171.34] <a href="#">Signed in location</a>	Signed	Fred Marshall signed the envelope	Sent
8/3/2017   04:47:36 pm	Melanie E. Deschutes (English (US)) [web:12.202.171.34]	Notary Auth	Melanie E. Deschutes was authenticated as a valid electronic notary public by the state of Florida	Sent
8/3/2017   04:47:40 pm	Melanie E. Deschutes (English (US)) [web:12.202.171.34]	Viewed	Melanie E. Deschutes viewed the envelope [documents:(Blank Document.docx)]	Delivered
8/3/2017   04:48:17 pm	Melanie E. Deschutes (English (US)) [web:12.202.171.34]	Uploaded Attachment	Melanie E. Deschutes uploaded a file that contains a signer attachment to document a190f1c5-bb92-4a03-8ecc-11df36777957	Delivered
8/3/2017   04:48:49 pm	Melanie E. Deschutes (English (US)) [web:12.202.171.34] <a href="#">Signed in location</a>	Notarized	Melanie E. Deschutes notarized the envelope	Completed

- **Certificate of Completion.** The signer and notary events are captured on the Certificate for a complete audit trail of the transaction.

Signer Events	Signature	Timestamp
<p>Fred Marshall fmarshall@mailinator.com Sr. Director My company Security Level: Notarized Signing (Notary: Mike Marsh), Account Authentication (None) Electronic Record and Signature Disclosure: Accepted: Feb 17, 2017   15:32 ID: 4597ee49-ff6b-4ebf-9f14-5662bc8a5293</p>	<p>DocuSigned by:  Using IP Address: 174.46.233.194</p>	<p>Sent: Feb 17, 2017   15:32 Viewed: Feb 17, 2017   15:32 Signed: Feb 17, 2017   16:15</p>
In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Notary Events		Timestamp
<p>Notary Name: Mike L. Marsh Notary Email: mike.marsh@mailnesia.com Notary Address: 123 Danser Blvd San Francisco CA 90001 Notary Signer: Fred Marshall Notary Designated By: Melanie R. Deschutes Security Level: Email, Account Authentication (None)</p>		<p>Sent: Feb 17, 2017   15:32 Viewed: Feb 17, 2017   16:16 Signed: Feb 17, 2017   16:17 Freeform Signing</p>

- **Download or print.** As the sender, you can download or print the documents as usual. If the notary attached an additional notarial certificate to the documents, it is included when you download or print. The notary's access to the signed documents is limited to the signing session; they cannot view or download the documents after the transaction is completed.

# Managing Envelopes

In DocuSign, an *envelope* is comprised of the documents you send for signature, and the recipient and other information that you associate with it.

The Manage page lists all of your envelopes. You can easily review status, access your files, create folders, search for a specific envelope, and perform additional actions, like resending or correcting. Once you send an envelope, or just start a draft, it is added to your Manage list.

## Managing Envelope Video

Here's a two minute video on managing envelopes to get you started:

[Click here to watch video](#)

The Manage page provides a convenient workspace for all of your envelope management activities:

- [Access all details](#) of your sent, received, and in process envelopes
- Use the convenient filters to find envelopes by status, sender, or date quickly and easily
- Create custom [folders](#) to file and organize your envelopes
- Resume preparing your draft envelopes with a single click
- Start a new envelope
- Take further action, such as [sign](#), [correct](#), [create a copy](#), [void](#), [delete](#), or [remind](#) your recipients to sign

The screenshot displays the DocuSign web interface. At the top, there is a navigation bar with 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. Below this is a 'NEW' button and an 'Inbox' header. A search bar and 'FILTERS' button are also present. The main area shows a list of envelopes with columns for status, date, and time. A left sidebar contains 'ENVELOPES', 'QUICK VIEWS', 'FOLDERS', and 'POWERFORMS'. Several callouts are overlaid on the interface:

- Start a new envelope**: Points to the 'NEW' button.
- View unfiled envelopes that you sent or received, and your unsent drafts**: Points to the 'Inbox' folder in the sidebar.
- Use filters to select documents to display by status, sender, or date**: Points to the 'FILTERS' button.
- Quick Views provide one click access to common categories**: Points to the 'QUICK VIEWS' section in the sidebar.
- Move, sign, or resend envelopes with a single click**: Points to the 'MANAGE' button for an envelope.
- Select an envelope to take additional actions**: Points to the 'SIGN' button for an envelope.
- Create folders to organize your envelopes**: Points to the 'FOLDERS' section in the sidebar.

Envelope Title	Status	Date	Time	Action
Please DocuSign: Residential Property Agreement - 123 Spring St.	Completed	8/3/2017	04:48:49 pm	MOVE
Business done faster!	Waiting for Others	8/2/2017	02:01:36 pm	RESEND
Please DocuSign: Credit Application Melanie E. Deschutes	Completed	7/28/2017	12:11:20 pm	MOVE
Registration Deschutes	Need to Sign	7/26/2017	05:14:59 pm	SIGN
Review Meeting Minutes	Need to Sign	7/26/2017	02:07:42 pm	SIGN
Summer Interns	Waiting for Others Expiring	7/19/2017	04:18:26 pm	RESEND
Please DocuSign: Bill of Sale.doc	Declined	7/19/2017	01:46:30 pm	MOVE

## View Envelope Details

One of the key benefits of DocuSign is the recording and storage of all documents and their related activities. You can see details on the routing, recipient actions, and status for any envelope that you sent or received.

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[Manage page - basic status information](#)

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## Manage page for basic status information

The Manage page provides basic status for your envelopes. From this list, you can see the following details:

Inbox				Q Search Inbox and Folders	FILTERS
Filtered by: Date (Last 6 Months)   <a href="#">Edit</a>					
	Subject	Status	Last change		
<input type="checkbox"/>	✓ <b>Please DocuSign: Document 1.docx</b> To: Melanie E. Deschutes for Abby Angle	Completed	2017-09-19 14:44	MOVE	▼
<input type="checkbox"/>	! <b>Application for Membership</b> To: John O'Reilly, Melanie E. Deschutes	Need to Sign	2017-09-19 10:25	SIGN	▼
<input type="checkbox"/>	✓ <b>Please DocuSign: Resume Spec</b> To: Melanie E. Deschutes	Completed	2017-08-30 16:05	MOVE	▼
<input type="checkbox"/>	✓ <b>Please DocuSign: Document 1.docx</b> To: Melanie E. Deschutes	Completed	2017-08-28 08:21	MOVE	▼
<input type="checkbox"/>	! <b>Please DocuSign: Document 1.docx, Permission form - Media.docx</b> To: Melanie E. Deschutes for Abby Angle	Need to Notarize Expiring	2017-08-25 11:20	NOTARIZE	▼
<input type="checkbox"/>	✓ <b>Please DocuSign: Bill of Sale.doc</b> To: Melanie E. Deschutes	Completed	2017-08-24 11:49	MOVE	▼
<input type="checkbox"/>	✓ <b>Please DocuSign: Lease Agreement</b> To: Melanie E. Deschutes	Completed	2017-08-22 10:25	MOVE	▼

- **Subject** - provides the title of your transaction, which is generated by the Subject line of the message

- **Status** - specifies the current [status of the envelope](#), such as Completed, Waiting For Others, Voided, and Draft
- **Recipients** - the list of recipients for the envelope
- **Last Change** - provides the date of the current status

## Details view for more specifics

The Details view, which you can see by clicking on an envelope in the Manage list, gives more specifics on the signing status. The view shows each recipient's activity on the envelope, including the date viewed, which recipients have signed, and which have yet to complete the signing transaction.

The screenshot shows the details view for an envelope titled "Poplar Street Lease - Unit #17, Angle, Abbey & Johann". The status is "Waiting for Others". The page includes a "Recipients" table and a "SIGNING ORDER" section. The recipients table lists three recipients: Abby Angle (Needs to Sign, Viewed on 21-Feb-18 | 14:37), Johann Angle (Needs to Sign), and Melanie E. Deschutes (Needs to Sign). The signing order section shows three pages of the document, with the first page being the current page.

**Poplar Street Lease - Unit #17, Angle, Abbey & Johann** ⓘ  
Last change on 21-Feb-18 | 14:37  
Sent on 21-Feb-18 | 14:35

⌚ **Waiting for Others**

RESEND MOVE CORRECT MORE ▾

⬇️ 🖨️

**Recipients** SIGNING ORDER

	CURRENT	
1	<b>Abby Angle</b> angle@mailinator.com	<b>Needs to Sign</b> Viewed on 21-Feb-18   14:37
	<b>Johann Angle</b> johanna@mailinator.com	<b>Needs to Sign</b>
	WAITING	
3	<b>Melanie E. Deschutes</b> melanie.deschutes@gmail.com	<b>Needs to Sign</b>

Poplar Street Lea...  
Pages: 4

1

2

**EXAMPLE**

Let's say you are a landlord for an apartment complex. Recently, you sent a lease agreement to two prospective tenants. It's been a few days and the envelope still shows a status of Waiting For Others. You want to see which person still needs to sign the lease. From the Manage page, you click on the envelope to view the details. You review the Recipients section and see that, while both signers have received the lease, neither one has signed yet. You decide to follow up with your prospective tenants to see if they still intend on renting the apartment.

## Recipient status

The status for each recipient is similar to the overall envelope status options:

- **Needs to Sign** - The recipient has not yet signed.
- **Signs in Person** - The In Person signer has not yet signed.
- **Copy Received** - The email notification was sent to a cc: recipient. When the recipient views the document, the date is recorded.
- **Signed** - The recipient has finished signing.
- **Needs to View** - The recipient has not yet viewed the document.
- **Viewed** - The Needs to View recipient reviewed the document on the date specified.
- **Authentication Failed** - The recipient failed to pass the access authentication requirement for the envelope. Authentication failures are recorded in the [Envelope History](#), which you can check for more details on the failure. These failures are listed in the Activity log as "IDCheck Failed".
- **Auto Responded** - The email notification failed to reach the intended recipient. Check the email address used and correct as needed. For this recipient status, on the Manage page, you'll also see the status **Delivery Failure: Email bounced**.

**Note:** Delivery failures to Receives a Copy recipients are not reported. Use Needs to View as the recipient action if you need to confirm delivery.

- **Fax Pending** - The recipient chose to sign on paper and return the document by fax. The system is waiting for the return fax.
- **Declined** - The recipient declined to sign.

**Note:** When a recipient declines to sign, the envelope status changes to Declined and no further action is allowed.

## History and Certificate of Completion

Sometimes you need a complete audit trail of your DocuSign transaction. In addition to the Manage page and Details view, which provide basic document and recipient status, there are two additional resources containing further document details: the envelope History and the Certificate of Completion. [More info...](#)

## History and Certificate of Completion

Sometimes you need a complete audit trail of your DocuSign transaction. In addition to the [Manage page and Details view](#), which provide basic document and recipient status, there are two additional resources containing further document details:

- **History.** The History provides a summary of the envelope and document details and a list of Activities to date.

**Envelope and Document History**

**Details**

**Subject**  
Please DocuSign this document: Star of America Shuttle schedule.pdf

**Envelope ID**  
34979fb7-1929-4b7b-9eb6-faed31773774

**Date Sent**  
2017 July 11 | 10:54

**Date Created**  
2017 July 11 | 10:27

**Location**  
Online

**Time Zone**  
My computer's time zone

**Enclosed Documents**  
Star of America Shuttle schedule.pdf

**Envelope Recipients**  
Fred Marshall

**Status**  
Completed

**Status Date**  
2017 July 11 | 10:55

**Holder**  
Melanie E. Deschutes

**Activities**

Time	User	Action	Activity	Status
2017 July 11   10:27	Melanie E. Deschutes (English (US)) [web:12.202.171.34]	Registered	The envelope was created by Melanie E. Deschutes	Created
2017 July 11   10:54	Melanie E. Deschutes (English (US)) [web:12.202.171.34]	Sent Invitations	Melanie E. Deschutes sent an invitation to Fred Marshall [fmarshall@mailinator.com]	Sent
2017 July 11   10:55	Fred Marshall (English (US)) [web:12.202.171.34]	Opened	Fred Marshall opened the envelope [documents:(Star of America Shuttle schedule.pdf)]	Sent
2017 July 11   10:55	Fred Marshall (English (US)) [web:12.202.171.34]	Viewed	Fred Marshall viewed the envelope [documents:(Star of America Shuttle schedule.pdf)]	Delivered
2017 July 11   10:55	Fred Marshall (English (US)) [web:12.202.171.34] <a href="#">Signed in location</a>	Signed	Fred Marshall signed the envelope	Completed
2017 July 11   12:22	Fred Marshall (English (US)) [web:12.202.171.34]	Viewed	Fred Marshall viewed the envelope [documents:(Star of America Shuttle schedule.pdf)]	Completed

**Buttons:** DOWNLOAD CERTIFICATE, PRINT, CLOSE

English | Powered by DocuSign | Contact Us | Terms of Use | Privacy | Intellectual Property | xDTM Compliant | Copyright © 2017 DocuSign, Inc. All rights reserved.

- **Certificate of Completion.** This resource provides complete details of the envelope events and the executed Consumer Disclosure.

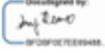


Certificate of Completion		
Envelope Number: 4A02C6EF93A94B9C8F54291E370432D7	Status: Completed	
Subject: Agreement for Services		
Code: expired		
Source Envelope:		
Document Pages: 1	Signatures: 1	Envelope Originator:
Certificate Pages: 2	Initials: 0	Melanie Deschutes, CPM
AutoNav: Enabled		123 Danser Blvd
Envelope Stamping: Enabled		San Francisco, CA 90001
		melanie.deschutes@gmail.com
		IP Address: 54.218.177.230

Record Tracking		
Status: Original 07-20-2014   11:07 PT	Holder: Melanie Deschutes, CPM melanie.deschutes@gmail.com	Location: DocuSign

Signer Events	Signature	Timestamp
Amy Demo amy.silverman@docusign.com Alpha One Security Level: Email, Account Authentication (None)  Electronic Record and Signature Disclosure: Not Offered ID:	 Digitized by: amy.silverman@docusign.com  Using IP Address: 174.46.233.200	Sent: 09-20-2014   11:09 PT Viewed: 09-20-2014   11:09 PT Signed: 09-20-2014   11:09 PT

In Person Signer Events	Signature	Timestamp

Editor Delivery Events	Status	Timestamp

Agent Delivery Events	Status	Timestamp

Intermediary Delivery Events	Status	Timestamp

Certified Delivery Events	Status	Timestamp

Carbon Copy Events	Status	Timestamp
Denise Ravetti denise.ravetti@mailnesia.com Chief Product Officer Ravetti Cleaning Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered ID:	<div style="border: 2px solid blue; padding: 5px; display: inline-block; font-weight: bold; color: blue;">COPIED</div>	Sent: 09-20-2014   11:09 PT
Mike Marsh mike.marsh@mailnesia.com Melanie Deschutes Properties Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered ID:	<div style="border: 2px solid blue; padding: 5px; display: inline-block; font-weight: bold; color: blue;">COPIED</div>	Sent: 09-20-2014   11:09 PT

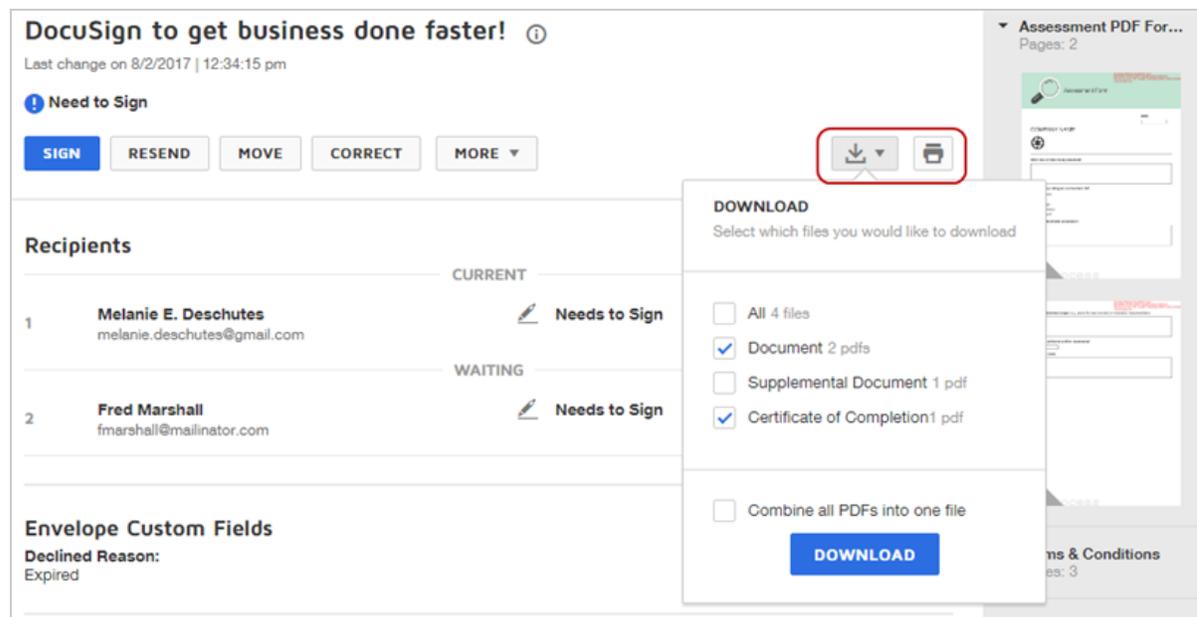
These resources provide a full audit trail of your DocuSign transaction. If a participant in the transaction repudiates their signature, or if there is any question about the transaction, this audit trail can resolve all such objections. These records are available to all participants in a transaction.

## To view the History or Certificate of Completion

1. From the Manage page, locate the envelope by searching, filtering, or simply scanning the list.
2. Click the envelope to show the Details view.  
This view provides summary history information about your envelope.

The screenshot shows the details of a DocuSign envelope titled "Poplar Street Lease - Unit #17, Angle, Abbey & Johann". The envelope status is "Waiting for Others". It was last changed and sent on 21-Feb-18 at 14:37. The page includes action buttons: RESEND, MOVE, CORRECT, and MORE. There are also icons for download and print. The "Recipients" section is divided into "CURRENT" and "WAITING" categories. The "CURRENT" category shows two recipients: Abby Angle (angle@mailinator.com) and Johann Angle (johanna@mailinator.com), both with a "Needs to Sign" status. The "WAITING" category shows one recipient: Melanie E. Deschutes (melanie.deschutes@gmail.com), also with a "Needs to Sign" status. A "SIGNING ORDER" icon is visible. On the right side, there is a preview of the document pages, showing "Poplar Street Lea..." and "Pages: 4".

3. To view the complete History, click the **More** drop-down and select **History**.
4. To download and view the Certificate of Completion PDF, click the **Download** icon and select **Certificate of Completion**.



The Certificate is downloaded to your local Downloads folder.

metadata: audit log; e-signature audit log; documentid; document id; Document ID;  
envelope ID

## Correct Envelopes

You can correct the details of in process envelopes that you sent or are shared with you, including both the recipient and document information.

### CONTENTS

[How to correct an envelope](#)

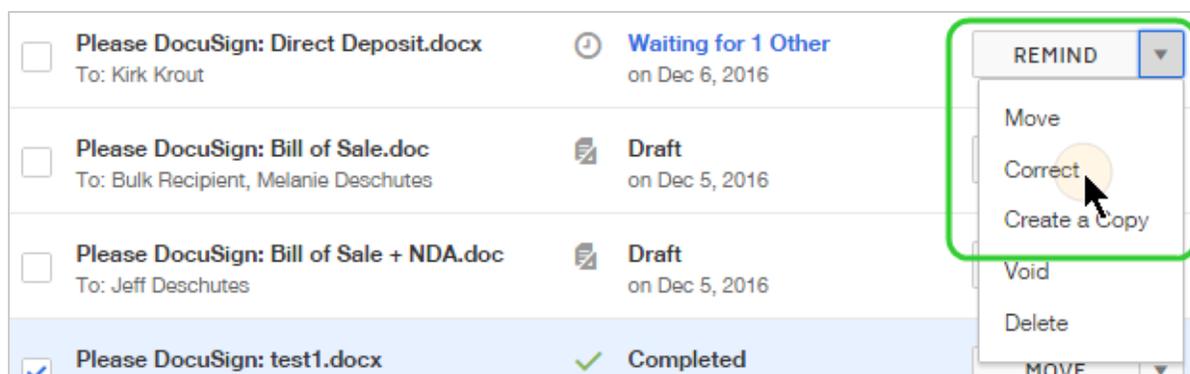
[How correct works \(video\)](#)

[Why can't I add documents when correcting an envelope?](#)

## What recipients see when you correct an envelope

### To correct an envelope

1. From the Manage page, locate the in process envelope for which you want to correct information.
2. Click the action menu and select **Correct**.



3. The Prepare view appears, with the status **Correcting** and you can edit the documents, recipient information, and fields:

← Please DocuSign: Direct Deposit.docx HELP DISCARD CHANGES NEXT >

Correcting

### Add Documents



Direct Deposit.docx

1 page



UPLOAD

GET FROM CLOUD ▾

### Add Recipients

As the sender, you automatically receive a copy of the completed documents.

≡ IMPORT BULK LIST

ADD FROM CONTACTS SIGNING ORDER

Set signing order

Kirk Kroun  NEEDS TO SIGN ▾ MORE ▾

kk22@mailnesia.com

ADD RECIPIENT

4. For recipient details, you can change the email address, name, routing order, recipient action, private message, and authentication.
5. To modify the expiration date or reminder details, or change recipient signing options, next to Advanced Options, select **Edit**.

**Message to All Recipients**

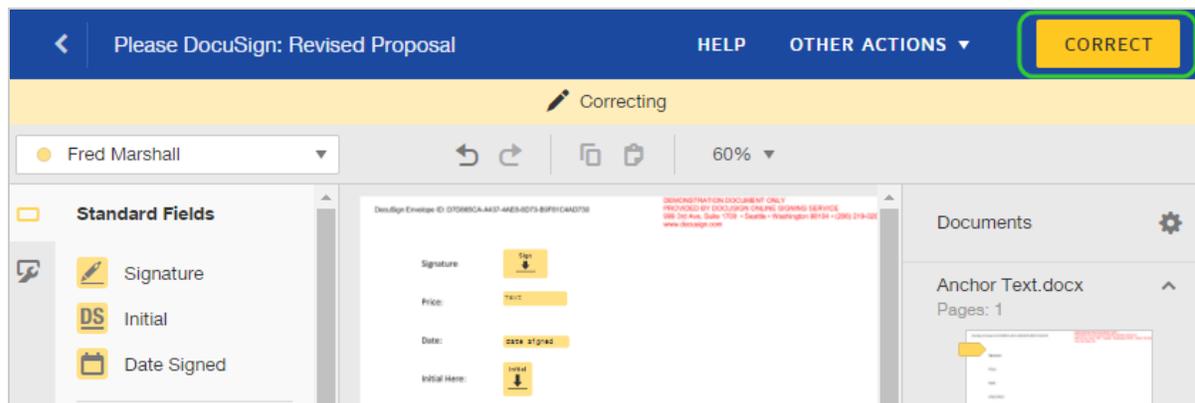
Please DocuSign: LeadPaintDisclosure.pdf

Enter Message

**Advanced Options** | [Edit](#)

- Documents will expire 30 days after send date
- Recipients will be warned 2 day(s) before request expires

6. When you are done editing the Prepare information, click **NEXT**.
7. Delete, modify, or add fields as needed, then click **CORRECT** to reissue the document to your outstanding recipients whose turn it is to sign.



The envelope is corrected and returns to the previous status state. If you modified recipient information, in process recipients receive a new email notification, which contains a new link to the envelope. Links in any previously received email notifications will no longer work and the recipient must use the link in the new email.

## How correct works

Want to see how correct works? Here's a two minute video to get you started:

[Click here to watch video](#)

**For recipients**, if they have not yet finished signing, you can correct any of the following information:

- Email address
- Name
- Routing order
- Recipient action
- General or Private Message
- Authentication

In addition, you add new recipients and remove recipients entirely from an envelope.

**For the files uploaded to your envelope**, you can add and delete files, and add or change recipient fields. You can also modify any of the advanced options for the envelope, such as extending the expiration date. Note that, if *any* recipient has completed signing, you can no longer delete or reorder the existing files. You can still add new files, and add fields to existing files.

**For automatic reminders**, if they are enabled for an envelope, then correcting resets the time sent for automatic reminder notifications. For example, if your automatic reminders are set for 3 days and you correct and resend an envelope, the automatic reminder will be sent 3 days after the correction, not 3 days after it was originally sent.

If you leave the Correct view without sending the envelope, your changes are discarded and the status reverts to the previous state.

## Why can't I add documents when I correct an envelope?

Sometimes when you correct an envelope, you may find that you cannot add new documents. The option to upload files is not present, as in this example:

Please DocuSign: Employment application.pdf DISCARD CHANGES NEXT

Correcting

### Add Documents to the Envelope

Employment application.pdf  
3 pages

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope. ADD FROM CONTACTS SIGNING ORDER

Set signing order

1 Deborah Sanders NEEDS TO SIGN MORE  
Email deb.sanders@mailinator.com

2 Pillar News NEEDS TO SIGN MORE X  
Email pnews@mailinator.com

Your account administrator can set an account option to restrict adding documents to in process envelopes where at least one recipient has completed

their action. In the above example, you can see the first recipient is grayed out, indicating they have finished signing the document.

This account option is set through the DocuSign Admin [Sending Settings](#).

## What your recipients see

- **Notifications.** When you correct an envelope, if you modify recipient information, a new email notification is sent to all outstanding recipients whose turn it is to sign. Recipients later in the routing order do not receive any notifications until it is their turn to sign. If a new email is generated, it contains a new link to the envelope. Links in any previously received email notifications will no longer work and the recipient must use the link in the new email.
- **Access while correcting.** If recipients try to view an envelope while you are correcting it, they get a message that it is not accessible, and that it is being corrected by the sender.

**Note:** Currently, correct is only available to users with paid DocuSign plans. Free accounts cannot use the correct feature. In addition, some accounts have only a more basic correct feature, which supports correcting some of the recipient information only. If you cannot access the more advanced correct features described in this topic, contact Customer Support. Visit our [Contact Support](#) web page for contact options.

## Add Signatures to a Completed Document

If you have a completed document but now you want to add additional signers or get more information from the original recipients, you'll have to create a new document to do so. You

have two options:

- **Forward the completed envelope:** [Forwarding](#) creates a copy of a completed envelope which you can send to new recipients as is or add new documents and fields as needed. For a forwarded envelope, you cannot remove any information or signatures on the completed documents, but you can add new recipients, documents, and recipient fields.
- **Clone the original envelope and start over:** Redo the original envelope entirely so that all audit information is in one transaction. You can [create a copy](#) of the original envelope – cloning makes an exact copy of what you sent the first time—and add files, recipients and fields as needed.

## Void Envelopes

Voiding an envelope cancels all outstanding signing activities. You can void any of your sent envelopes that have not yet completed. You can only void envelopes that you sent or manage, or are shared with you, and that are still in process. Envelopes with a status of either Waiting For Others, Needs to Sign, or Needs to View are in process.

**NOTE:** You cannot unvoid an envelope. Once you void an envelope, or if a signer refuses to sign, which voids the envelope, there is no way to reactivate the transaction. Your only options are to create a copy of the voided envelope and start the transaction over again, or create a new envelope from scratch.

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[How to void an envelope](#)

[Access to voided envelopes](#)

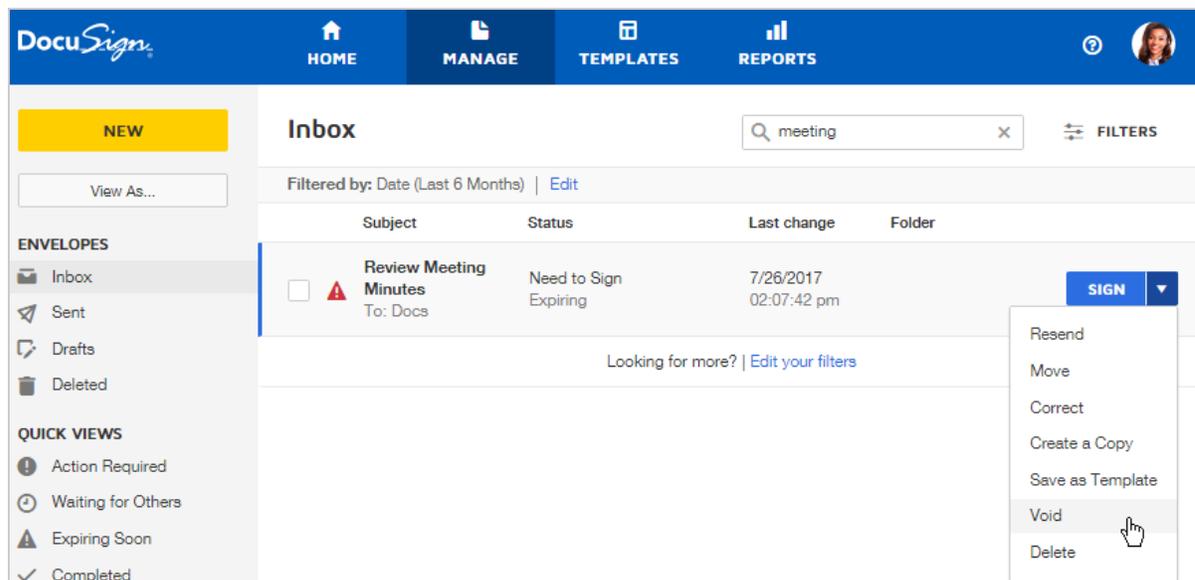
[Notifications for voided envelopes](#)

[Voiding an envelope on which you are also a recipient](#)

## To void an envelope

You can void any envelope that you sent or manage, or is shared with you, and that is still in process. Be aware that if you *delete* such an envelope, that also *voids* the envelope.

1. From the Manage page, locate the in process envelope that you want to void.
2. Click the **drop-down arrow** to show the actions menu and select **Void**.



3. Enter a brief reason for voiding the document. This reason is included in the email notification sent to recipients, and is added to the envelope Details and History views.
4. Confirm your action by clicking **VOID**.

The envelope is voided, and the status in the Manage list changes to Voided.

## Access to voided envelopes

When you void an envelope, recipients who have not yet signed can no longer view or sign it. For recipients who have finished signing and the sender, voiding does not restrict their access to it. However, a "VOID" watermark is placed on all pages.

## Notifications for voided envelopes

When you void an envelope, all recipients who have either finished signing or whose turn it is to sign receive an email telling them that the envelope was voided. If there are recipients further down the routing order, they do not receive any notification regarding the voided envelope.

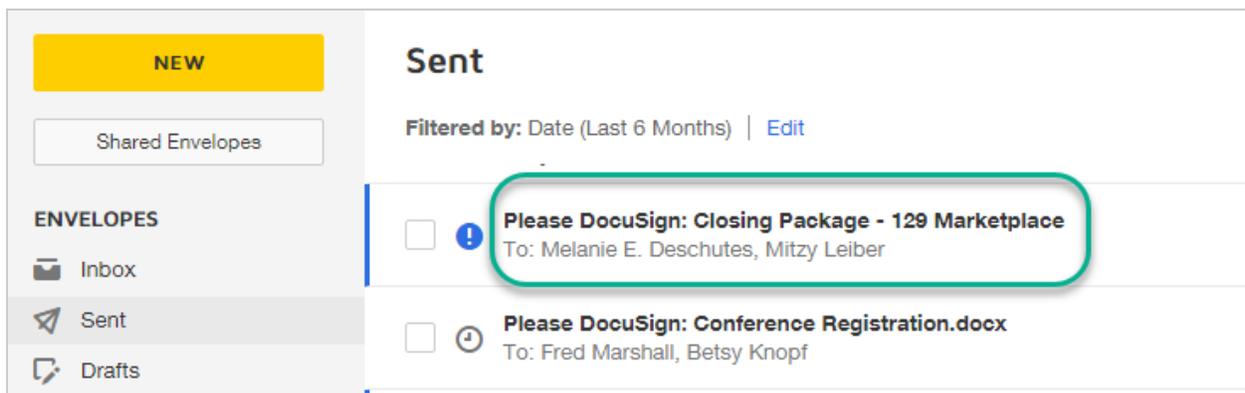
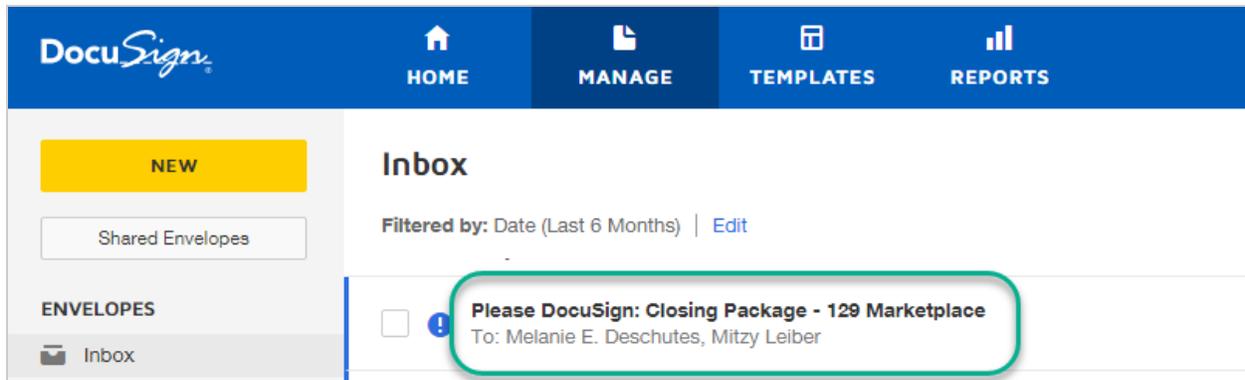
If you do not want void notifications sent to recipients whose turn it is to sign, you can [correct the envelope](#) to remove them from the routing order. After you correct the envelope you can void it, and notifications will be sent only to the recipients who have already finished signing.

## Voiding an envelope on which you are also a recipient

You may be both the sender and a recipient on an envelope. In this case, the in process envelope can appear in three places: Sent folder, Inbox, and Action Required quick view. These are all representations of one envelope, and any action you take on any one of them affects the envelope entirely. That is, you cannot void the envelope from your Inbox without voiding and deleting the transaction for all parties.

If you are trying to clear out your Inbox or Sent folder and want to avoid voiding an in process envelope, you can instead move the envelope to a personal folder. For more on folders, see the [Folders guide](#).

Here's an example for an envelope sent by Melanie in which she is also the first recipient. Shown are the three views of the envelope, in her Inbox, Sent folder, and Action Required quick view. All three represent the same envelope and Melanie can void the envelope from any one of the views.



**NEW**

Shared Envelopes

**ENVELOPES**

- Inbox
- Sent
- Drafts
- Deleted

**QUICK VIEWS**

- Action Required

### Action Required

Filtered by: Date (Last 6 Months) | [Edit](#)

<input type="checkbox"/>	<b>Please DocuSign: Closing Package - 129 Marketplace</b> To: Melanie E. Deschutes, Mitzy Leiber	Need to Sign
--------------------------	---	--------------

[Looking for more?](#) | [Edit y](#)

## Delete Envelopes

You can delete any of your sent or received envelopes, regardless of what state they are in. You can delete draft, in process, completed, and voided envelopes. Deleting an envelope that you sent cancels any outstanding signing activities and voids the transaction. For any deleted envelope, after a short delay, it is permanently removed from your DocuSign account.

Deleting an in process envelope that you sent, manage, or is shared with you will also [void](#) the transaction. If you are trying to clear out your Inbox or Sent folder and want to avoid voiding an in process envelope, you can instead move the envelope to a personal folder. For more on folders, see the [Folders guide](#).

**IMPORTANT:** Deleted envelopes remain in your Deleted bin for only a short time (less than 24 hours), after which they are removed permanently and cannot be recovered.

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[To retrieve a deleted envelope](#)

[What happens when you delete an envelope?](#)

[Retrieving deleted envelopes](#)

## To delete an envelope

Be aware that if you delete an in process envelope you sent, manage, or is shared with you, it will also **void** the transaction for all recipients.

1. From the Manage page, locate the envelope you want to delete.
2. Click the drop-down action list for the envelope and select **Delete**.



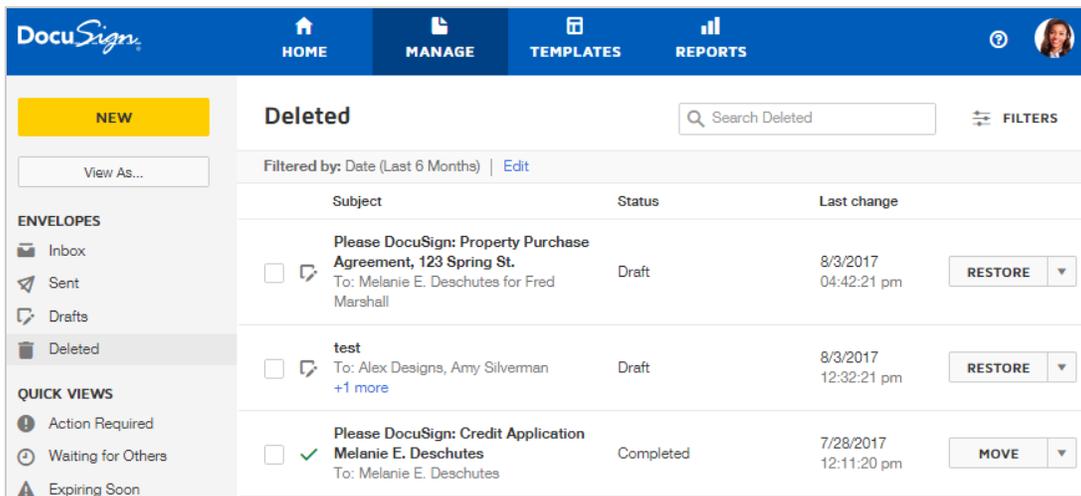
3. The envelope is deleted and placed in your Deleted bin.

## To retrieve a deleted envelope

1. On the Manage page, click the **Deleted** bin.
2. In the list of deleted envelopes, locate the one you want to retrieve.

3. Depending on the status, do one of the following:

- **Draft.** Click **Restore**. The envelope is restored to your Drafts folder.
- **Completed.** Click **Move** and select a folder to move the envelope to.
- **Voided.** Click **Move** and select a folder to move the envelope to. The envelope remains voided but will not be removed from your account.



The screenshot shows the DocuSign interface for the Deleted envelopes section. The top navigation bar includes HOME, MANAGE, TEMPLATES, and REPORTS. The main content area is titled "Deleted" and includes a search bar and a filter button. The envelopes are listed in a table with columns for Subject, Status, and Last change. Each envelope has a checkbox and a button (RESTORE or MOVE).

Subject	Status	Last change	Action
<input type="checkbox"/> <input type="checkbox"/> Please DocuSign: Property Purchase Agreement, 123 Spring St. To: Melanie E. Deschutes for Fred Marshall	Draft	8/3/2017 04:42:21 pm	RESTORE
<input type="checkbox"/> <input type="checkbox"/> test To: Alex Designs, Amy Silverman <a href="#">+1 more</a>	Draft	8/3/2017 12:32:21 pm	RESTORE
<input type="checkbox"/> <input checked="" type="checkbox"/> Please DocuSign: Credit Application Melanie E. Deschutes To: Melanie E. Deschutes	Completed	7/28/2017 12:11:20 pm	MOVE

What happens when you delete an envelope?

### For the envelopes you send

If you delete an envelope which you sent, the effects on the recipients varies, depending on the state of the envelope when you delete it.

**For in process envelopes.** As the sender, deleting an *in process* envelope cancels any outstanding signing activities and voids the transaction. The envelope moves to your

Deleted bin for a short time, and then is removed permanently from your account.

Recipients on a deleted in process envelope experience the following:

- All outstanding recipients, and recipients who have completed signing, receive an email telling them that the envelope was voided.
- Recipients who have not yet signed can no longer view or sign it.
- Recipients who have already finished signing can still view, download, and print the documents, but they bear a "VOID" watermark.

**For completed envelopes.** If you delete a *completed* envelope, where all recipients have finished signing, the envelope moves to your Deleted bin for a short time, and then is removed permanently from your account. Recipients are unaffected when you delete a completed envelope from your account; they can still view, download, and print the completed documents.

### **For the envelopes sent to you**

As a recipient, you can delete any received envelopes in your account. Deleting a received envelope does not cancel your signing action, and it has no effect on the sender or any other recipients. If you have not yet signed, you may still receive reminder notifications to view and sign.

Deleting an envelope moves it to your Deleted bin for a short time (less than 24 hours), and then it is removed permanently from your account.

As a recipient, you can delete any received envelopes in your account. Deleting a received envelope does not cancel your signing action, and it has no effect on the sender or any other recipients. If you have not yet signed, you may still receive reminder notifications to view and sign.

Deleting an envelope moves it to your Deleted bin for a short time (less than 24 hours), and then it is removed permanently from your account.

### **For the envelopes where you are both the sender and a signer**

You may be both the sender and a recipient on an envelope. In this case, the in process envelope can appear in three places: Sent folder, Inbox, and Action Required quick view. These are all representations of one envelope, and if you delete any one of them, you are voiding and deleting the envelope entirely. That is, you cannot delete the envelope from your Inbox without voiding and deleting the transaction for all parties.

If you are trying to clear out your Inbox or Sent folder and want to avoid voiding an in process envelope, you can instead move the envelope to a personal folder. For more on folders, see the [Folders guide](#).

### **Retrieving deleted envelopes**

If you decide you want to keep a deleted envelope after all, you have a short time (less than 24 hours) to retrieve it before it is permanently deleted from your account.

- **Drafts.** You can restore a deleted draft to your Drafts folder and continue preparing it to send.
- **Completed or Voided.** For a completed or voided envelope, you can move it into a folder, either your Inbox or any other folder in your account, to regain access to the envelope and keep it in your account.

The screenshot displays the DocuSign interface for the 'Deleted' section. The top navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The main content area is titled 'Deleted' and features a search bar and a 'FILTERS' button. Below this, a table lists deleted envelopes with columns for 'Subject', 'Status', and 'Last change'. The table contains three entries:

Subject	Status	Last change	Action
Please DocuSign: Property Purchase Agreement, 123 Spring St. To: Melanie E. Deschutes for Fred Marshall	Draft	8/3/2017 04:42:21 pm	RESTORE
test To: Alex Designs, Amy Silverman <a href="#">+1 more</a>	Draft	8/3/2017 12:32:21 pm	RESTORE
Please DocuSign: Credit Application Melanie E. Deschutes To: Melanie E. Deschutes	Completed	7/28/2017 12:11:20 pm	MOVE

The left sidebar contains a 'NEW' button, a 'View As...' dropdown, and sections for 'ENVELOPES' (Inbox, Sent, Drafts, Deleted) and 'QUICK VIEWS' (Action Required, Waiting for Others, Expiring Soon).

## Resend Envelopes

Resending an envelope sends another copy of the original email notification to all signers whose turn it is to sign and have yet to finish signing. These recipients receive the same email notification as was originally sent to them with an updated link to review and sign the documents. Links in any previously received email notifications will no longer work and the recipient must use the link in the new email.

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[How to resend to all outstanding recipients](#)

[How to resend to just one recipient](#)

[When to use resend](#)

[How it works](#)

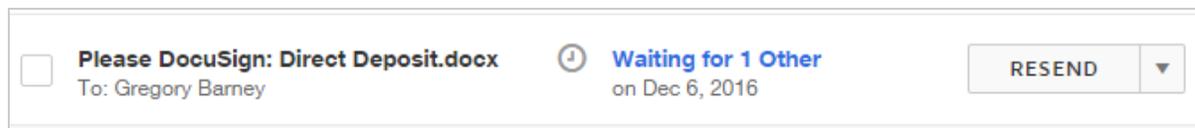
## How to resend an envelope

There are two ways to resend an envelope:

- [Resend to all outstanding recipients whose turn it is to sign](#)
- [Resend to just one recipient](#)

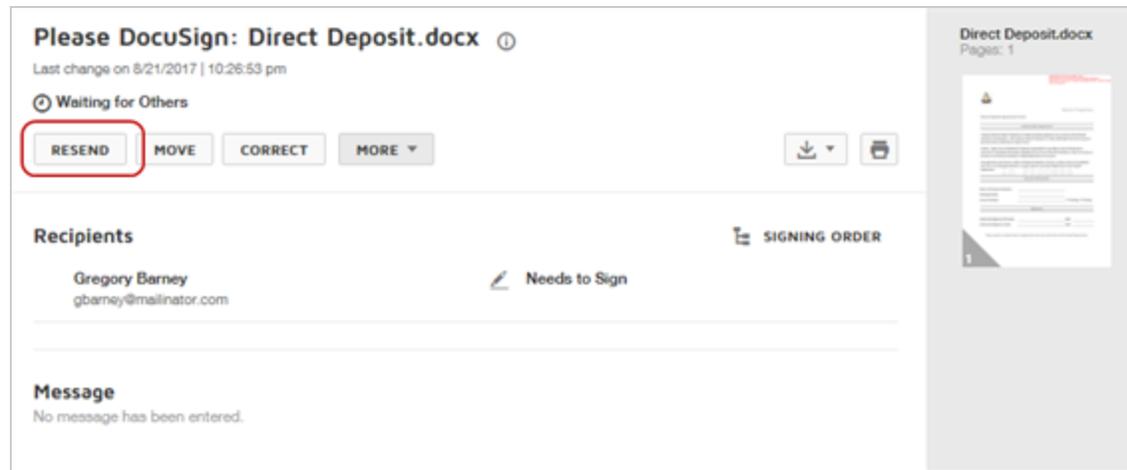
### To resend from the Manage page or Details view

1. From the Manage page, locate the in process document which you want to resend, and click **RESEND**.



2. (Optional) To review the detailed status of an envelope before resending
  - a. Click the title to open the Details view.
  - b. To resend the email notification to the outstanding recipients whose turn it is to

sign, click **RESEND**



An email notification for your envelope is sent to all outstanding recipients whose turn it is to sign. The email contains a new link to open the envelope. The link in any previous notification will no longer work.

### To resend an envelope to just one recipient

If you want to selectively remind a single recipient, you can use the Correct feature to add or edit the [Private Message](#). When you modify the Private Message for a recipient, an email notification is issued to that person, with the new Private Message text and a new link to the envelope.

1. From the Manage page, locate the in process document which you want to resend and click the title to open the Details view
2. Click **Correct**.

3. For the recipient you want to remind, click the **More** menu and select **Add private message** and enter your message.
4. Click **Done**. The message panel collapses and shows a private message is added for the recipient.



The screenshot shows a recipient's information in a DocuSign interface. It includes a text input field containing the name "Fred Marshall", another text input field containing the email address "fmarshall@mailinator.com", and a status indicator "NEEDS TO SIGN" with a dropdown arrow. To the right of the status is a "MORE" dropdown menu. Below the input fields, a notification bubble with a speech icon and the text "Private message added" is visible.

5. Click **Next**, and then **Save and Resend**.

The recipient receives a new email notification with your updated private message and a new link to open the envelope. The link in any previous notification will no longer work.

## When to use resend

The resend feature is useful for these situations:

- Your recipients have deleted or lost the original notification email
- You want to remind the outstanding recipients whose turn it is to sign to DocuSign your document
- You added access code authentication to your document and the recipient fails the validation process; resend gives them another chance to pass the authentication challenge

## How resend works

You can resend any of your sent envelopes or those shared with you that are not yet completed. All in process recipients whose turn it is to view and sign receive a new email notification. The email notification is the same as was originally sent to them but has an updated link to review and sign the documents. Links in any previously received email notifications will no longer work and the recipient must use the link in the new email.

If automatic reminders are enabled for an envelope, then resending it resets the time sent for automatic reminder notifications. For example, if your automatic reminders are set for 3 days and you resend a document, the automatic reminder will be sent 3 days after that date, not 3 days after the envelope was originally sent.

**Note:** You can only resend envelopes that you sent or are shared with you, and that are still in process. Envelopes with a status of either Waiting For Others, Needs to Sign, or Needs to View are in process.

## Clone Envelopes with Create a Copy

The Create a Copy option clones an envelope to make a copy, which contains all of the same uploaded files, recipients, and signing fields. You can clone any envelope you created that is either in progress, completed, or voided.

Create a Copy is a great time saving feature that allows you to leverage the preparation work you've already done. Once you copy an envelope, you can modify any aspect of it. You can add files, change recipients, modify the message, and make changes to the signing fields.

Common use cases for cloning:

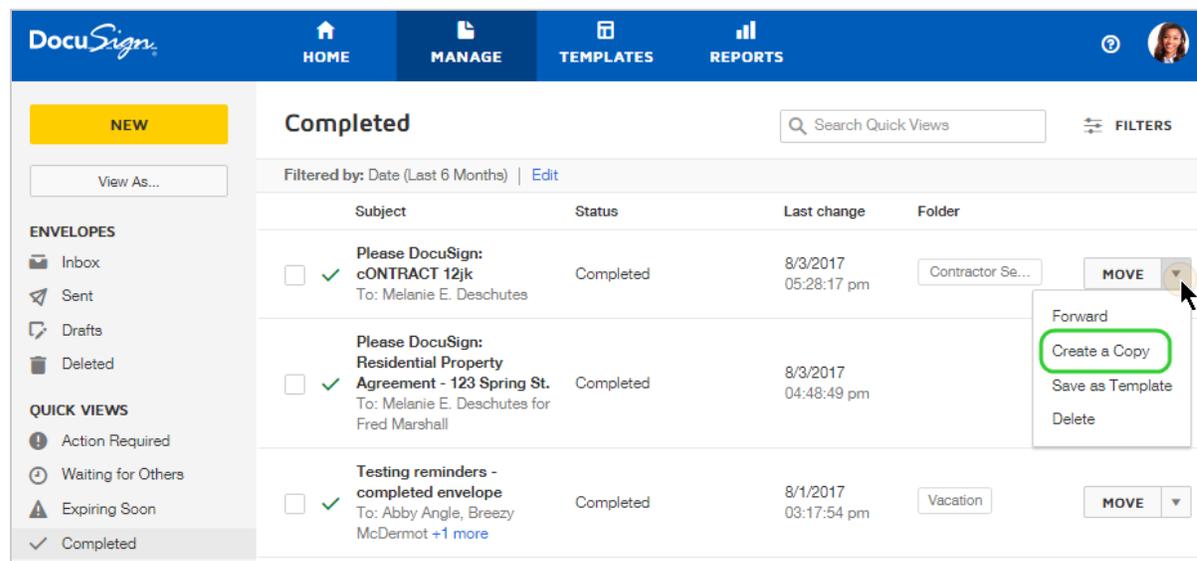
- Copy a completed envelope to send to a new recipient.
- If you void an envelope, you can create a copy, make any necessary changes, and send it again.

#### **EXAMPLE**

You run a landscape design company and you just sent a proposal to a new client for their approval. But one of the recipients signs the proposal, you realize you forgot to include a wireframe layout of the proposed design. You void the original document, and then clone it. The cloned document still has all of the original document's information, so you don't need to go through all of the sending steps. You just add the missing drawing file, place an Initial signing field, and send the documents out to your client.

### To create a copy of an envelope

1. From the Manage page, locate the envelope by searching, filtering, or simply scanning the list.
2. Click the **drop-down arrow** to show the actions menu and select **Create a Copy**.



The screenshot shows the DocuSign interface with a navigation bar at the top containing 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. A sidebar on the left includes a 'NEW' button and sections for 'ENVELOPES' (Inbox, Sent, Drafts, Deleted) and 'QUICK VIEWS' (Action Required, Waiting for Others, Expiring Soon, Completed). The main area is titled 'Completed' and shows a table of envelopes. The table has columns for 'Subject', 'Status', 'Last change', and 'Folder'. Three envelopes are listed, all with a status of 'Completed'. A context menu is open over the 'MOVE' button of the first envelope, with options: 'Forward', 'Create a Copy' (highlighted with a green circle), 'Save as Template', and 'Delete'.

Subject	Status	Last change	Folder
Please DocuSign: cONTRACT 12jk To: Melanie E. Deschutes	Completed	8/3/2017 05:28:17 pm	Contractor Se... MOVE
Please DocuSign: Residential Property Agreement - 123 Spring St. To: Melanie E. Deschutes for Fred Marshall	Completed	8/3/2017 04:48:49 pm	
Testing reminders - completed envelope To: Abby Angle, Breezy McDermot +1 more	Completed	8/1/2017 03:17:54 pm	Vacation MOVE

3. Make whatever changes to the envelope you like: add or remove files, recipients, or modify the message.
4. To make changes to your recipient fields, click **NEXT**.
5. To send your envelope, click **SEND**.

## Save as Template

Save as Template provides a quick way to make a template from an envelope you've already prepared. You can save any envelope you sent or drafted as a template. Everything you added to the original envelope is included in the template. This includes all envelope data, including the recipient properties and message information, and all advanced option settings, such as reminders and expirations. The template also includes all documents in the envelope, plus all fields placed with any data you entered and all field properties.

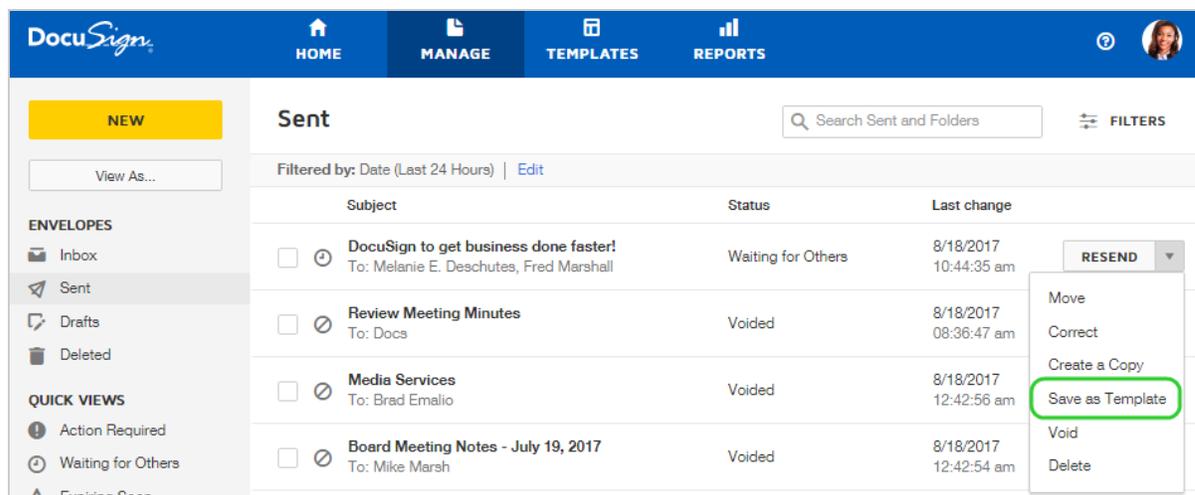
**Note:** Your access to templates is controlled by your user permissions, as defined by your DocuSign administrator. If you cannot create or edit, or even use templates, check with your administrator.

## Envelope recipients become roles on the template

On the template, the original recipients are replaced by role recipients, but retain the recipient action. The role name reflects the action. For example, a Receives a Copy recipient on the original envelope becomes "CC 1" on the template, and a Needs to Sign recipient becomes "Signer 1".

## To save an envelope as a template

1. From the Manage page, locate the envelope you want to save as a template.
2. Click the action menu and select **Save as Template**.



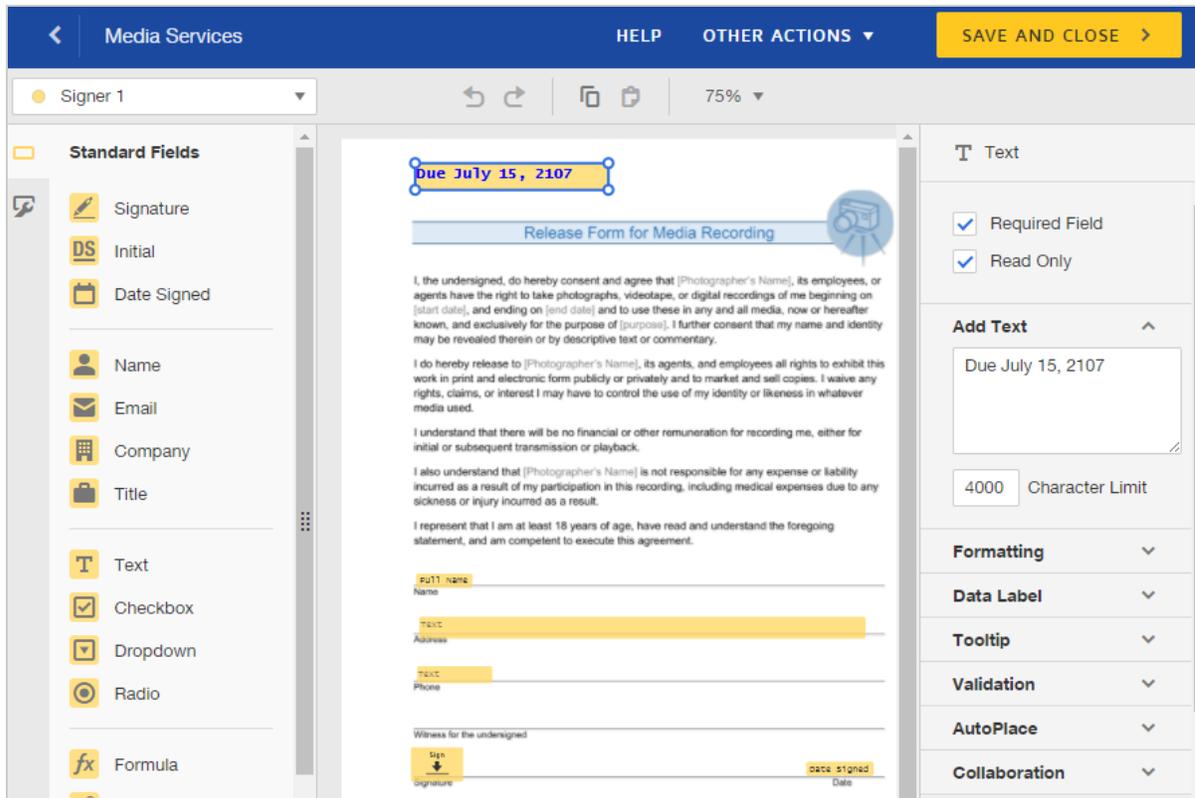
The screenshot shows the DocuSign interface with the 'Sent' folder selected. The interface includes a navigation bar with 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The 'Sent' folder is active, and a search bar is visible. The main content area displays a list of envelopes with columns for Subject, Status, and Last change. A context menu is open over the first envelope, 'DocuSign to get business done faster!', with the 'Save as Template' option highlighted in green.

Subject	Status	Last change
DocuSign to get business done faster! To: Melanie E. Deschutes, Fred Marshall	Waiting for Others	8/18/2017 10:44:35 am
Review Meeting Minutes To: Docs	Voided	8/18/2017 08:36:47 am
Media Services To: Brad Emelio	Voided	8/18/2017 12:42:56 am
Board Meeting Notes - July 19, 2017 To: Mike Marsh	Voided	8/18/2017 12:42:54 am

3. A new template appears, open for further editing.

The screenshot shows the 'Media Services' template creation interface. At the top, there is a blue header with a back arrow, the text 'Media Services', and navigation links for 'HELP', 'OTHER ACTIONS', and a yellow 'NEXT' button. Below the header, the 'Template Name and Description' section contains a text input field with 'Media Services' and a larger text area for an optional description. The 'Add Documents' section features a document preview of a 'Permission form - Media.do...' with '1 page' and a menu icon, alongside an 'UPLOAD' button and a 'GET FROM CLOUD' dropdown menu. The 'Add Recipients' section includes the instruction 'As the sender, you automatically receive a copy of the completed documents.' and three icons: 'IMPORT BULK LIST', 'ADD FROM CONTACTS', and 'SIGNING ORDER'. A checkbox for 'Set signing order' is present. A recipient card for 'Signer 1' is shown with fields for 'Name' (with a contact icon) and 'Email' (with a dropdown arrow), and a 'NEEDS TO SIGN' status with a 'MORE' dropdown. An 'ADD RECIPIENT' button is at the bottom.

4. The template includes all the fields placed on the original documents and any data you entered, plus all field properties as they were set.



5. Make any other edits as desired and click **SAVE AND CLOSE**.
6. Your new template is saved and listed on the Templates page in your My Templates list.

<div style="display: flex; justify-content: space-between; align-items: center;"> <span>HOME</span> <span>MANAGE</span> <span style="background-color: #0056b3; color: white; padding: 2px 10px; border-radius: 3px;">TEMPLATES</span> <span>REPORTS</span> </div>				
<h2>My Templates</h2>		<input type="text" value="Search My Templates"/>		
Name	Owner	PowerForms	Last change	Folders
<input type="checkbox"/> <b>Media Services</b> Eligible for matching	Melanie E. Deschutes		08-Feb-18 11:30	

## Forward a Completed Envelope

Forwarding creates a copy of a completed envelope which you can send to new recipients as is or add new documents and fields as needed. For a forwarded envelope, you cannot remove any information or signatures on the completed documents, but you can add new recipients, documents, and recipient fields.

You can forward any completed envelope that you sent or received, or created to sign yourself. If you have access to any shared envelopes, you can forward any of those sent or received by the owner.

### CONTENTS

[How to forward a completed envelope](#)

[How to forward a shared envelope](#)

[Forwarding events in the History](#)

### To forward a completed envelope

1. From the Manage page, locate the completed envelope that you want to forward by clicking the **Completed** Quick View, and then searching, filtering, or simply scanning the list.

The screenshot shows the DocuSign 'Completed' envelope view. The interface includes a navigation bar with 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. A search bar contains 'NDA'. The main table lists two completed envelopes. The 'Completed' view is highlighted in the left sidebar.

Subject	Status	Last change	Folder
<input type="checkbox"/> ✓ NDA - Schreiber Labs To: Elisabeth Schreiber	Completed	26-Feb-18 11:23	MOVE ▾
<input type="checkbox"/> ✓ Please DocuSign: 1Way-NDA_template.doc To: Melanie E. Deschutes	Completed	26-Feb-18 09:37	MOVE ▾

Looking for more? | [Edit your filters](#)

2. Click the action menu for the envelope and select **Forward**.

The close-up screenshot shows the 'Forward' action menu for an envelope. The menu options are 'Forward', 'Create a Copy', 'Save as Template', and 'History'.

Subject	Status	Last change	Folder
<input type="checkbox"/> ✓ NDA - Schreiber Labs To: Elisabeth Schreiber	Completed	26-Feb-18 11:23	MOVE ▾
<input type="checkbox"/> ✓ Please DocuSign: 1Way-NDA_template.doc To: Melanie E. Deschutes	Completed	26-Feb-18 09:37	MOVE ▾

Looking for more? | [Edit your filters](#)

3. In the new envelope, the completed documents are present and renamed to include the prefix "FWD:". You can add documents or apply templates as needed.
4. Add recipients to the new envelope and fill in the message details. The message subject becomes the envelope name in your account, and the message is included in the email notification sent to all recipients.
5. Click **NEXT** to add fields for your recipients.

The previously completed documents retain all information and signatures committed on the original envelope; you cannot remove or change any of this detail.

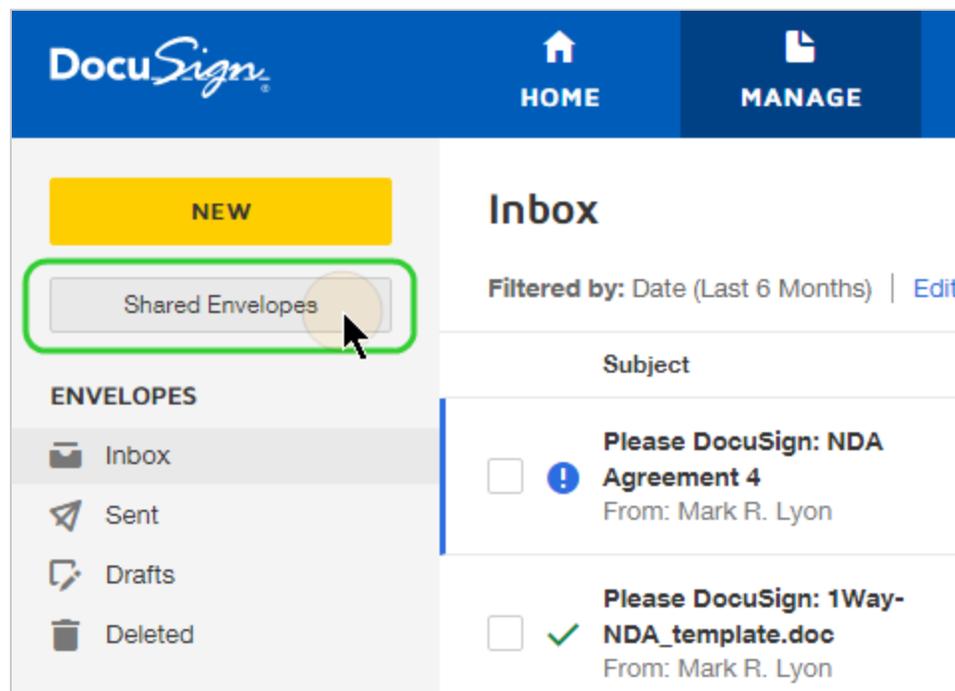
6. Add fields for your recipients as needed.
7. Click **SEND** when you're ready to send the new envelope.

The envelope is sent to the recipients you defined. They can see all the information and signatures that were on the original documents, and complete their assigned fields.

## To forward a shared envelope

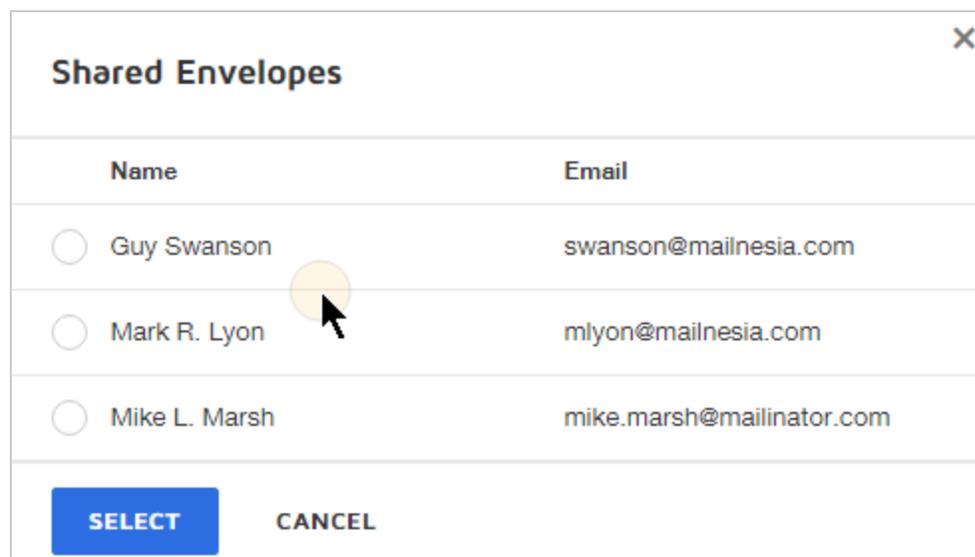
If you have access to shared envelopes, you can forward any completed shared envelope. The forwarded envelope is sent from your account, not the shared user's. Your DocuSign administrator sets up sharing between users. For more information on shared envelopes, see [Shared Envelopes](#).

1. Log in to your account and go to the **Manage** page.
2. In the left-hand navigation, click the **Shared Envelopes** button.



The screenshot shows the DocuSign interface. At the top, there is a blue navigation bar with the DocuSign logo on the left, and 'HOME' and 'MANAGE' buttons on the right. Below the navigation bar, there is a sidebar on the left and a main content area on the right. The sidebar contains a yellow 'NEW' button, a 'Shared Envelopes' button (highlighted with a green border and a mouse cursor), and a list of envelope categories: 'ENVELOPES', 'Inbox', 'Sent', 'Drafts', and 'Deleted'. The main content area is titled 'Inbox' and shows a list of envelopes. The first envelope is 'Please DocuSign: NDA Agreement 4' from Mark R. Lyon, with a blue exclamation mark icon. The second envelope is 'Please DocuSign: 1Way-NDA\_template.doc' from Mark R. Lyon, with a green checkmark icon. The 'Shared Envelopes' button in the sidebar is highlighted with a green border and a mouse cursor.

If you have access to others' envelopes, the Shared Envelopes window opens, listing all the user names of the people whose envelopes are shared with you.



The screenshot shows a 'Shared Envelopes' dialog box. The dialog has a title bar with the text 'Shared Envelopes' and a close button (X) in the top right corner. Below the title bar, there is a table with two columns: 'Name' and 'Email'. The table contains three rows of data:

Name	Email
<input type="radio"/> Guy Swanson	swanson@mailnesia.com
<input type="radio"/> Mark R. Lyon	mlyon@mailnesia.com
<input type="radio"/> Mike L. Marsh	mike.marsh@mailinator.com

At the bottom of the dialog, there are two buttons: 'SELECT' (a blue button) and 'CANCEL' (a grey button). A mouse cursor is pointing at the radio button for Mark R. Lyon.

3. Select a user and click **SELECT**.

The selected user's envelopes appear with a banner at the top of the list identifying the shared user.

DocuSign

HOME MANAGE TEMPLATES REPORTS

Envelopes belonging to Mark R. Lyon. [Return to my envelopes](#)

Shared Envelopes

**Inbox** Search Inbox and Folders FILTERS

Filtered by: Date (Last 6 Months) | [Edit](#)

ENVELOPES	Subject	Status	Last change
Inbox			
Sent			
Deleted			
	<b>Agreement - Preliminary Draft</b> To: Mark R. Lyon, Melanie E. Deschutes	Needs to be Signed	2017-10-09 15:21

RESEND

4. Click the **Completed** Quick View, and then locate the envelope you want to forward by searching, filtering, or simply scanning the list.

5. Click the **FORWARD** button next to the envelope you want to forward.

Shared Envelopes

**Completed** Search Quick Views FILTERS

Filtered by: Date (Last 6 Months) | [Edit](#)

ENVELOPES	Subject	Status	Last change	Folder
Inbox				
Sent				
Deleted				
QUICK VIEWS				
Action Required				
Waiting for Others				
Expiring Soon				
Completed				
	<b>Please DocuSign: Five Canyons map</b> From: Melanie E. Deschutes	Completed	16-Mar-18 15:55	
	<b>Please DocuSign: Amy Silverman.docx</b> To: Deborah Sanders	Completed	28-Feb-18 17:41	
	<b>Please DocuSign: Amy Silverman.docx</b> To: Melanie Deschutes	Completed	28-Feb-18 17:02	

FORWARD

FORWARD

FORWARD

6. The new envelope opens for you to add documents, recipients, message, and fields.

7. Complete and send the new envelope.

The previously completed documents retain all information and signatures committed on the original envelope; you cannot remove or change any of this detail.

## Forwarding tracked in History

A forwarded envelope is a tracked event in your DocuSign account, helping to maintain a complete record of your transactions. The History for a forwarded envelope records the forwarding activity for both the original envelope and the forwarded copy

- **In the original document**, the History shows a Forwarded To event, with the envelope ID of the new copy.
- **For the forwarded copy**, the History shows a Forwarded From event, with the envelope ID of the original envelope. Document file names are prefixed with "FWD:".

**Example:** Original envelope history—Forwarded To event

Oct 21, 2016   12:29	Melanie Deschutes (English (US)) [api:10.103.101.11]	Forwarded To	Melanie Deschutes forwarded to envelope 3f293789-e246-4651-a1b9-f0037a68a78d	Completed
----------------------------	--	-----------------	--	-----------

**Example:** Forwarded envelope history—Forwarded From event

Envelope History				
<b>Subject</b> For board approval		<b>Enclosed Documents</b> FWD: NDA - Schreiber Labs.pdf		
<b>Envelope ID</b> ac1dd85e-ca11-405f-a50a-39bb189a8ac9		<b>Envelope Recipients</b> Mitzy Leiber		
<b>Date Sent</b> 16-Mar-18   18:11		<b>Status</b> Completed		
<b>Date Created</b> 16-Mar-18   17:45		<b>Status Date</b> 16-Mar-18   18:15		
<b>Time Zone</b> My computer's time zone		<b>Holder</b> Melanie E. Deschutes		
Activities				
Time	User	Action	Activity	Status
16-Mar-18   17:45	Melanie E. Deschutes (English (US)) [api:24.4.236.122]	Registered	The envelope was created by Melanie E. Deschutes	Created
16-Mar-18   17:45	Melanie E. Deschutes (English (US)) [api:24.4.236.122]	Forwarded From	Melanie E. Deschutes forwarded from envelope a91b8a1c-2bfb-4b30-81a8-dcb263545f32	Created

## Sign Documents In Your Account

From the DocuSign Documents page, you can easily sign documents that are already in your account and awaiting your signature. You can sign one document at a time, or you can select multiple documents and queue them up to sign one after the other.

If you are looking for how to upload a document to your account to sign yourself, no other signers, see [Sign a Document](#).

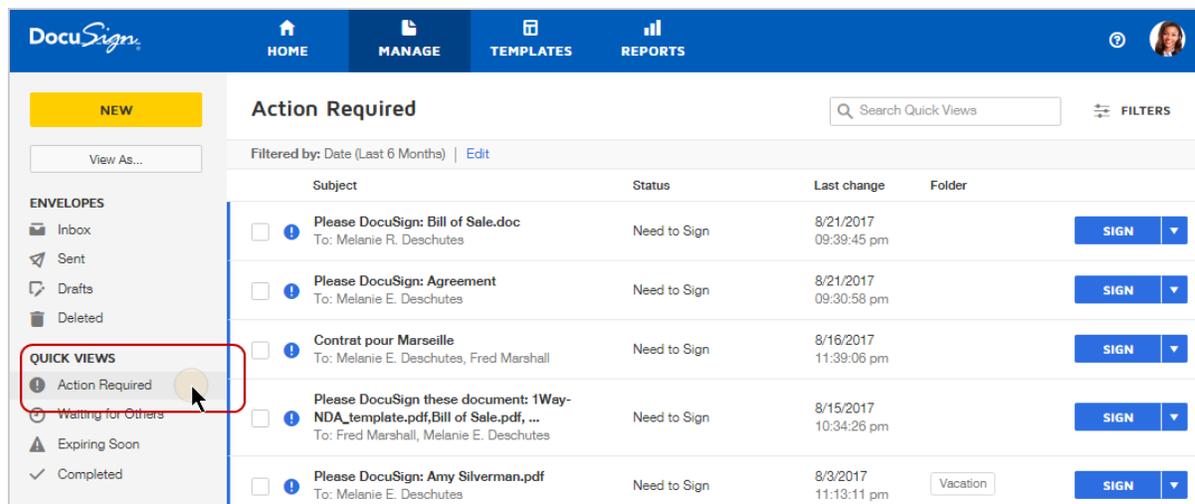
## CONTENTS

[How to sign one document](#)

[How to sign multiple documents](#)

### To sign one document

1. From the Manage page, filter the list by clicking the **Action Required** option in the Quick Views list.



The screenshot shows the DocuSign Manage page. The top navigation bar includes HOME, MANAGE, TEMPLATES, and REPORTS. The left sidebar contains ENVELOPES (Inbox, Sent, Drafts, Deleted) and QUICK VIEWS (Action Required, Waiting for Others, Expiring Soon, Completed). The 'Action Required' option in the Quick Views list is highlighted with a red box and a mouse cursor. The main content area displays a table of documents with columns for Subject, Status, Last change, and Folder. The table is filtered by 'Date (Last 6 Months)'. The documents listed are:

Subject	Status	Last change	Folder
<input type="checkbox"/> Please DocuSign: Bill of Sale.doc To: Melanie R. Deschutes	Need to Sign	8/21/2017 09:39:45 pm	
<input type="checkbox"/> Please DocuSign: Agreement To: Melanie E. Deschutes	Need to Sign	8/21/2017 09:30:58 pm	
<input type="checkbox"/> Contrat pour Marseille To: Melanie E. Deschutes, Fred Marshall	Need to Sign	8/16/2017 11:39:06 pm	
<input type="checkbox"/> Please DocuSign these document: 1Way-NDA_template.pdf,Bill of Sale.pdf, ... To: Fred Marshall, Melanie E. Deschutes	Need to Sign	8/15/2017 10:34:26 pm	
<input type="checkbox"/> Please DocuSign: Amy Silverman.pdf To: Melanie E. Deschutes	Need to Sign	8/3/2017 11:13:11 pm	Vacation

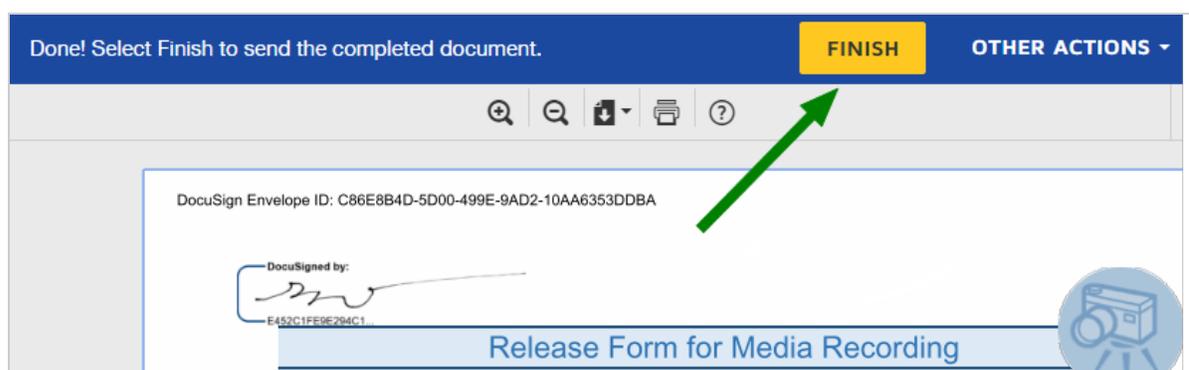
The list updates to show only those envelopes awaiting your action, including sign, needs to view, and correcting.

2. Locate the envelope you wish to sign and click the **SIGN** button.  
The Request for Signature dialog appears.
3. Click **Continue** to start signing.
4. Click **Finish** to finish signing and return to the DocuSign Manage page.

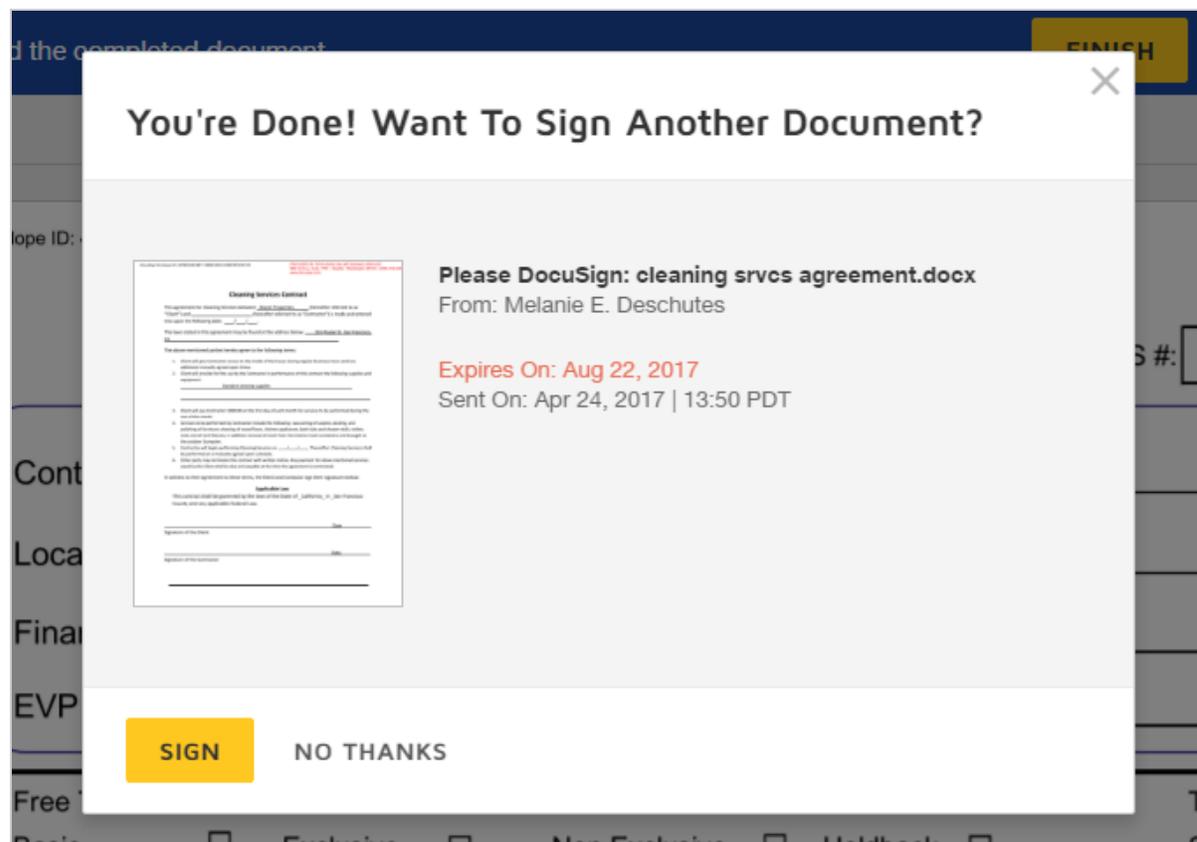
## To sign multiple documents

When you open any document from within your account to sign, when you finish signing, if you have additional documents to sign, you are prompted to sign the next document awaiting your action. Documents are offered in the order they appear in your account.

1. From the Manage page, locate the first document you wish to sign and click the **SIGN** button.
2. Complete the required fields and click **FINISH**.



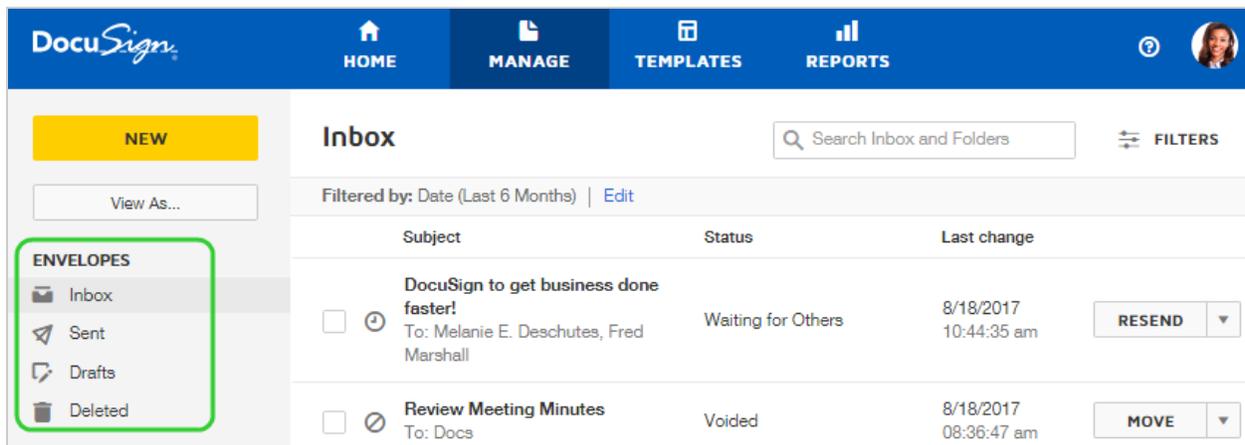
3. If you have additional documents to sign, you are prompted to address the next item that requires your action.



4. Click **Sign** to open the document and continue signing.
5. Click **No Thanks** to return to your account without signing.

## Folders

Folders provide another way to organize your Manage page. To start, your account has a set of envelope folders: Inbox, Sent, Drafts, and Deleted.



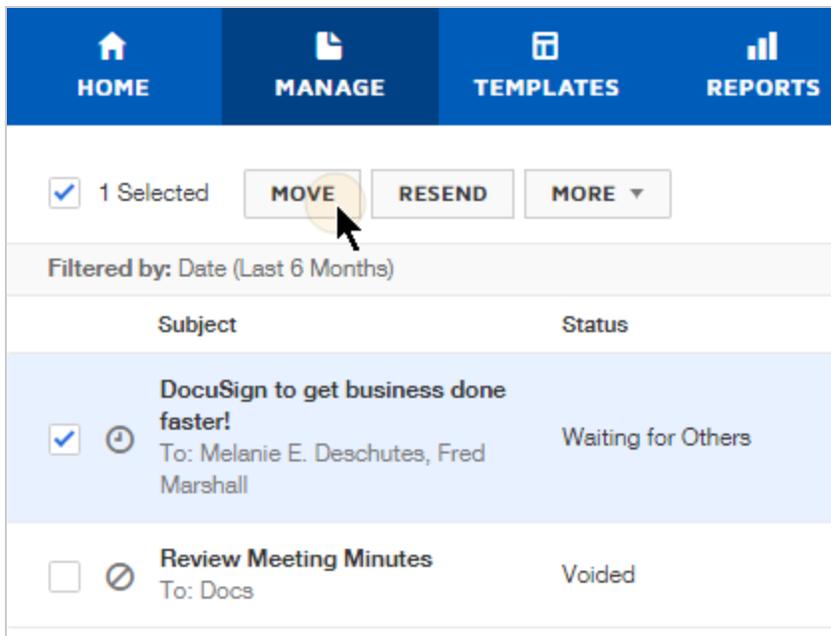
The screenshot shows the DocuSign interface. At the top, there is a blue navigation bar with the DocuSign logo and four main menu items: HOME, MANAGE, TEMPLATES, and REPORTS. On the right side of this bar, there is a user profile icon and a help icon. Below the navigation bar, the main content area is titled 'Inbox'. On the left side of the main area, there is a sidebar with a yellow 'NEW' button and a 'View As...' dropdown. Below this, there is a section titled 'ENVELOPES' with a green border, containing four options: 'Inbox', 'Sent', 'Drafts', and 'Deleted'. The main area displays a table of envelopes. The table has columns for 'Subject', 'Status', and 'Last change'. There are two envelopes listed:

Subject	Status	Last change
<input type="checkbox"/>  DocuSign to get business done faster! To: Melanie E. Deschutes, Fred Marshall	Waiting for Others	8/18/2017 10:44:35 am
<input type="checkbox"/>  Review Meeting Minutes To: Docs	Voided	8/18/2017 08:36:47 am

Each envelope row has a 'RESEND' or 'MOVE' button with a dropdown arrow.

To organize your envelopes, you can create folders and subfolders from the Manage page. You can move items out of your general **Inbox** and **Sent** views by putting them into folders. Once you create one or more folders, you can file your envelopes by either of these methods:

- Select the envelope and click **MOVE** at the top of the list.



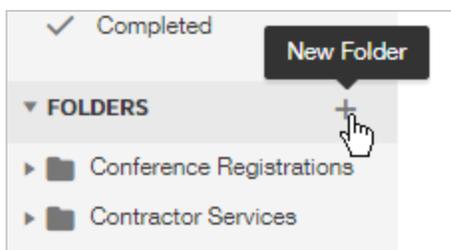
- Drag and drop the envelope from the list to the desired folder

By default, the folders show your envelopes from the last six months. You can use the **Load All** option for folders with no activity in the last six months. Or you can edit the filters applied to your folder. For more information, see [Locate Envelopes](#).

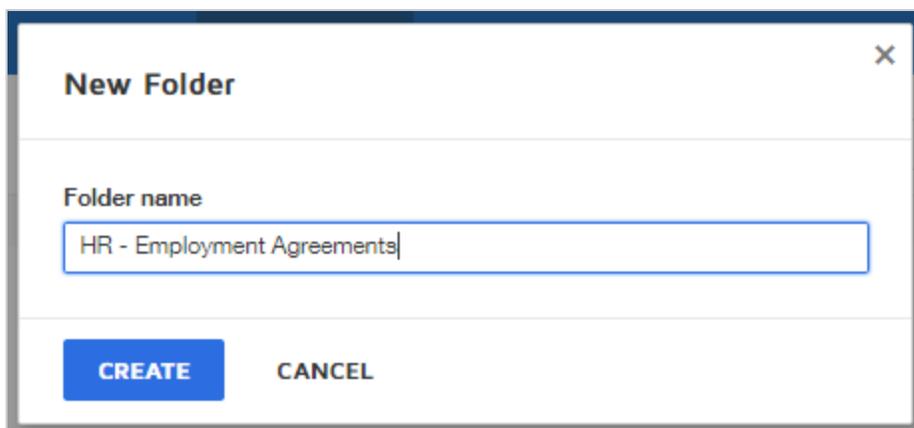
Folders are listed alphabetically, and the first 10 folders are visible. Use the **View More** option to expand the list to show all of your folders.

## To create, edit, delete, and move folders

1. Navigate to the Manage page.
2. To create a top-level folder:
  - a. Click the + icon at the top of the Folders list.

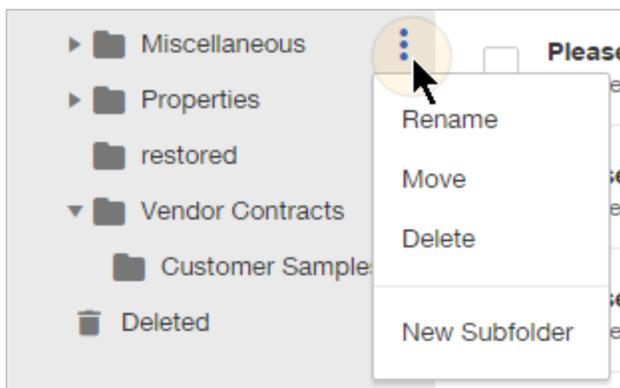


- b. In the New Folder dialog, enter a folder name and click **Create**.



The new folder appears in your Folders list.

3. To create a sub-folder:
  - a. In the list of folders, select the parent folder for the new subfolder.
  - b. Click the menu icon next to the folder name, and select **New Subfolder**.

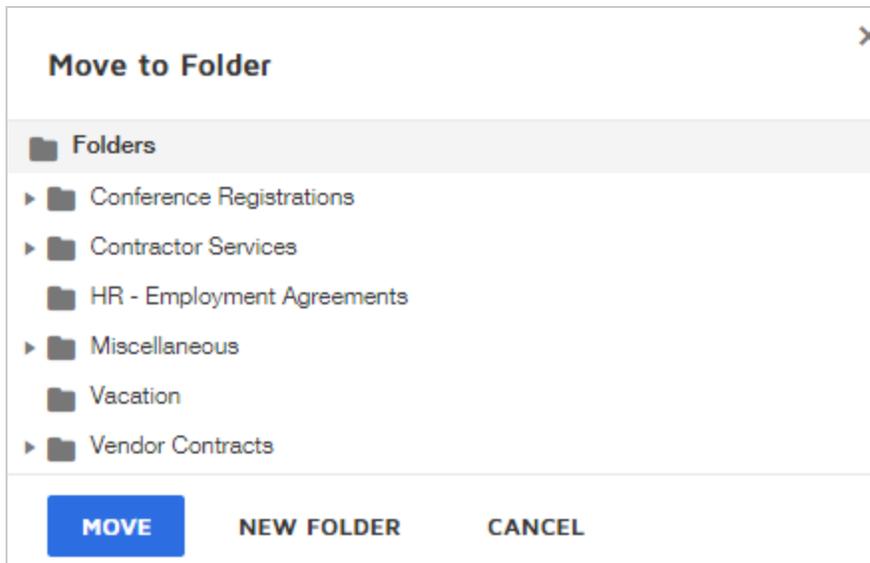


- c. Enter the folder name and click **Create**.



4. To edit or delete an existing folder, click the menu icon next to the folder name.
- To edit the folder name, select **Rename**.
  - To delete the folder, select **Delete**.  
**Note:** only empty folders can be deleted.
5. To move a folder:
- a. In the list of folders, locate the folder you want to move.
  - b. Click the icon next to the folder name, and select **Move**.
  - c. In the Move to Folder dialog, select where you want to move the folder to. You can move the folder inside an existing folder, into a new folder, or out of a folder and

into the main Folders list.



**Related Topics:** [Locate Envelopes](#)

## Locate Envelopes

The Manage page gives you access to all of the envelopes you sent, received, and the drafts which you are preparing to send. There are different ways to locate envelopes, including search, filters, and Quick Views. This topic explains how to use these methods to find an envelope in your account.

For most methods described in this topic, the results are limited to documents with activity in the last six months; this is a default date range applied to your envelopes list. To locate items older than six months, you can use the Filters method and select a different time period.

## Combine methods for targeted results

You can combine the Quick Views with search and filter methods. For example, if you select the Completed Quick View, and then enter a search term, the search returns results from within the list of completed envelopes.

### CONTENTS

[Using Quick Views](#)

[Search for envelopes](#)

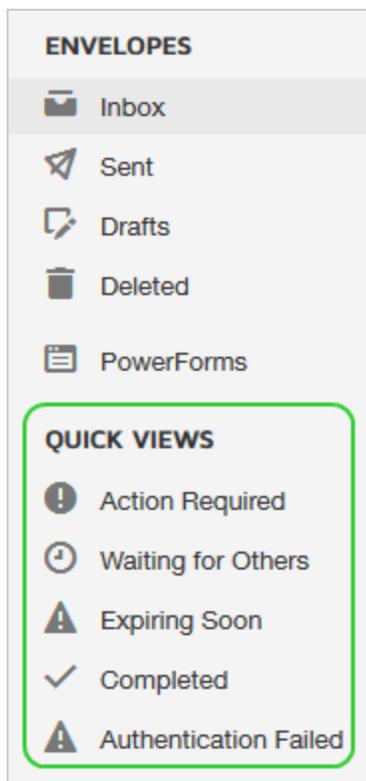
[Using filters](#)

**Note:** If you are using the **Shared Envelopes** option to view envelopes shared with you, these methods return results from the [shared envelopes](#).

## Using Quick Views

Quick Views are a great way to easily filter your envelopes for key categories. When you select a Quick View, the results list shows all of the envelopes that match the selected category. These results are restricted to activity from the last six months. To get different results, use the Filters menu to select a different time frame or specify the sender, or enter a search term to narrow the quick view results by envelope name, sender or recipient name, recipient email, or envelope ID.

Quick Views are located below your main Inbox, Sent, and Draft envelopes:



The Quick Views options are:

- **Action Required** - envelopes awaiting your action, which you need to either sign or view
- **Waiting for Others** - envelopes sent by you that are waiting for others to act on, either to sign or to view
- **Expiring Soon** - in process envelopes that are due to expire within six days
- **Completed** - envelopes with the status Completed, either sent or received
- **Authentication Failed** - envelopes with a recipient who failed the authentication challenge

Quick Views are also available on the Home page.

## Search for envelopes

The Search box at the top of your Manage page searches for matches to the envelope name, sender and recipient names, recipient email, and envelope ID. If you select the option to search in envelope custom fields, your search includes matches to the envelope [field values](#).

- **To search across all folders in your account** – Select your **Inbox**, then enter your search term in the **Search Inbox and Folders** box at the top of the page. In the results, if the envelope is filed in a folder, the folder is listed.

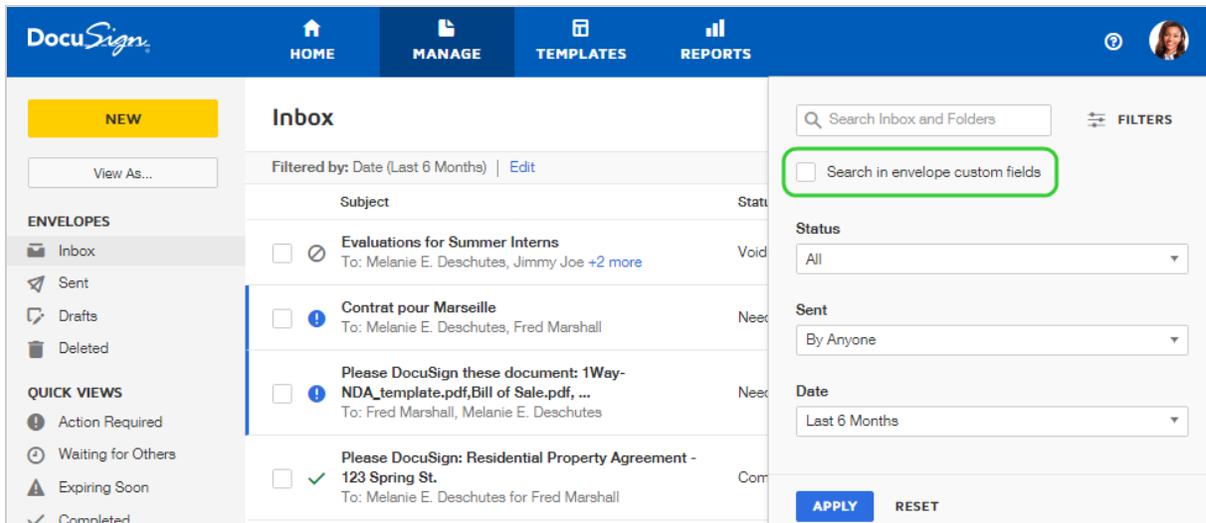
As an example, here is a search for all of the envelopes sent to or from "abby":

Inbox		<input type="text" value="abby"/> <span style="float: right;">FILTERS</span>	
Filtered by: Date (Last 6 Months)   <a href="#">Edit</a>			
Subject	Status	Last change	Folder
<input type="checkbox"/> <span style="font-size: small;">Please DocuSign: Blank Document.docx</span> To: Fred Marshall, Melanie E. Deschutes <a href="#">+1 more</a>	Waiting for Others	8/17/2017 11:27:38 am	Miscellaneous <input type="button" value="RESEND"/>
<input type="checkbox"/> <span style="font-size: small;">Evaluations for Summer Interns</span> To: Melanie E. Deschutes, Jimmy Joe <a href="#">+2 more</a>	Voided	8/17/2017 12:12:35 am	<input type="button" value="MOVE"/>
<input checked="" type="checkbox"/> <span style="font-size: small;">Testing reminders - completed envelope</span> To: Abby Angle, Breezy McDermot <a href="#">+1 more</a>	Completed	8/1/2017 03:17:54 pm	Vacation <input type="button" value="MOVE"/>
<input type="checkbox"/> <span style="font-size: small;">Testing reminders</span> To: Abby Angle, Breezy McDermot <a href="#">+1 more</a>	Waiting for Others	8/1/2017 03:11:50 pm	Vendor Contr... <input type="button" value="RESEND"/>

These results are restricted to activity from the last six months. To get more results, you can use the [Filters method](#), and include filter criteria to set a broader date range with your search terms.

- **To limit results to a single folder** – Select the folder you want to search from your folder list, and then enter your search term in the **Search Folders** box. The search is restricted to the selected folder; any sub-folders are not included in the search.

- **To search by envelope ID** - Select your **Inbox**, then enter the complete envelope ID in the **Search Inbox and Folders** box at the top of your Manage page.
- **To search envelope custom field values** - Enter your search term and select the **Search in envelope custom fields** option. Only exact matches are returned.



The screenshot shows the DocuSign interface with the 'MANAGE' tab selected. The main area displays the 'Inbox' with a list of envelopes. On the right, the 'FILTERS' panel is open, showing a search box and several filter options. The 'Search in envelope custom fields' checkbox is highlighted with a green box.

Subject	Status
<input type="checkbox"/> <input type="checkbox"/> Evaluations for Summer Interns To: Melanie E. Deschutes, Jimmy Joe +2 more	Void
<input type="checkbox"/> <input type="checkbox"/> Contrat pour Marseille To: Melanie E. Deschutes, Fred Marshall	Need
<input type="checkbox"/> <input type="checkbox"/> Please DocuSign these document: 1Way-NDA_template.pdf,Bill of Sale.pdf, ... To: Fred Marshall, Melanie E. Deschutes	Need
<input type="checkbox"/> <input checked="" type="checkbox"/> Please DocuSign: Residential Property Agreement - 123 Spring St. To: Melanie E. Deschutes for Fred Marshall	Com

## Using Filters

Filters offer a more detailed way to search for envelopes based on selected criteria. You can use the filter options with or without a search term or a quick view. The default filter, with Inbox selected, returns all of the envelopes in your Inbox from the last six months. Or, you can select one of your folders or a quick view and then filter for the items you want from that collection only.

The screenshot shows the DocuSign interface with the 'Inbox' view. The top navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The left sidebar has a 'NEW' button and a 'View As...' dropdown. Below that are sections for 'ENVELOPES' (Inbox, Sent, Drafts, Deleted) and 'QUICK VIEWS' (Action Required, Waiting for Others, Expiring Soon, Completed). The main 'Inbox' area shows a list of envelopes filtered by 'Date (Last 6 Months)'. The filter criteria are displayed at the top of the list: 'Filtered by: Date (Last 6 Months) | Edit'. The right sidebar contains a search bar and a 'FILTERS' panel with options for 'Search in envelope custom fields', 'Status' (All), 'Sent' (By Anyone), and 'Date' (Last 6 Months). 'APPLY' and 'RESET' buttons are at the bottom of the filter panel.

Set the filter criteria to display the envelopes you want. For example, to locate items older than six months, change the **Date** filter to **All**. Filter results show the envelopes which match all of your selected criteria. Your active filter criteria appear at the top of the search results. To modify the filter, click the **Edit** link.

This screenshot shows a portion of the DocuSign interface. The 'Inbox' title is on the left. To the right is a search bar labeled 'Search Inbox and Folders' and a 'FILTERS' button. Below these, the filter criteria are shown: 'Filtered by: Date (Last 30 Days), Status (Completed) | Edit'.

## Download or Print Documents

DocuSign aggregates all of your uploaded files into a PDF for a secure signing experience. You add files in any of our many [supported file formats](#), such as Word documents, spreadsheets, or images, and DocuSign brings them all together into a single,

tamper-sealed PDF. You can view the document image directly in the application, or you can download the PDF file for viewing, sharing, and printing.

When you download or print a PDF from DocuSign, it presents the current state of your document. In process documents bear an "In Process" watermark, and you can see any information or signatures from signers who have already finished signing. Only completed envelopes show the signing information for all recipients.

#### **EXAMPLE**

You've just completed a contract to provide cleaning services for a small startup. You contact the building manager for after hours access to the facility. The building manager needs proof of your contract with their tenant, so you download a copy of your cleaning services contract and email it to the building manager.

#### **CONTENTS**

[Download documents](#)

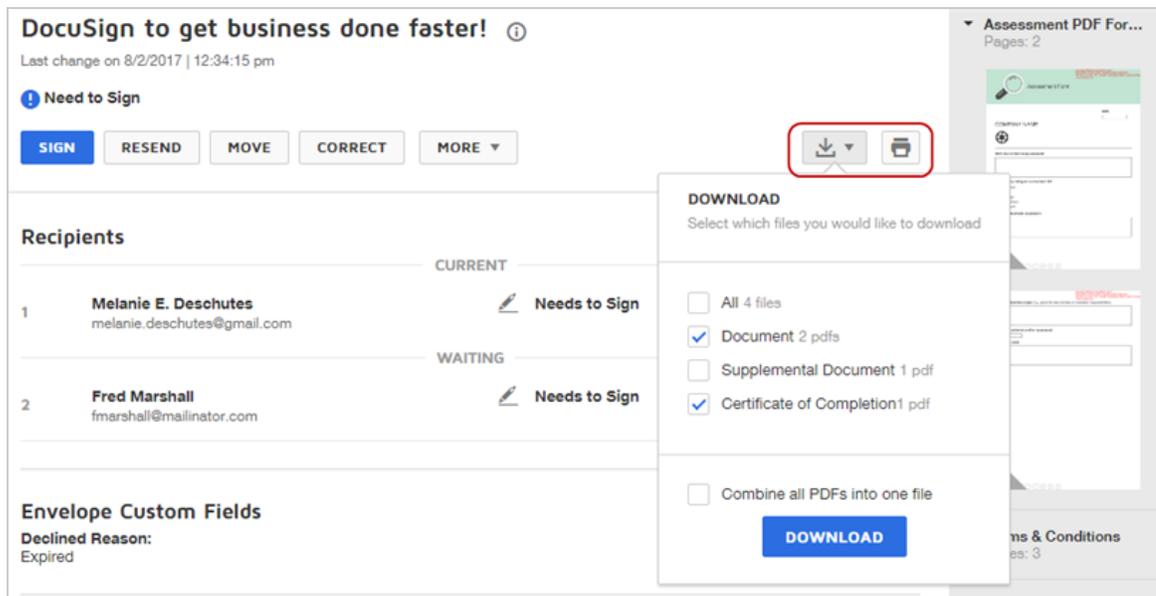
[Print documents](#)

[Troubleshooting: No Certificate of Completion in combined PDF option](#)

### To download documents

1. From the **Manage** page, locate the envelope that you want to download.
2. Click the envelope name to go to the Details view.
3. To download the envelope contents, click the **Download** icon at the top of the view and select which files you want to download:

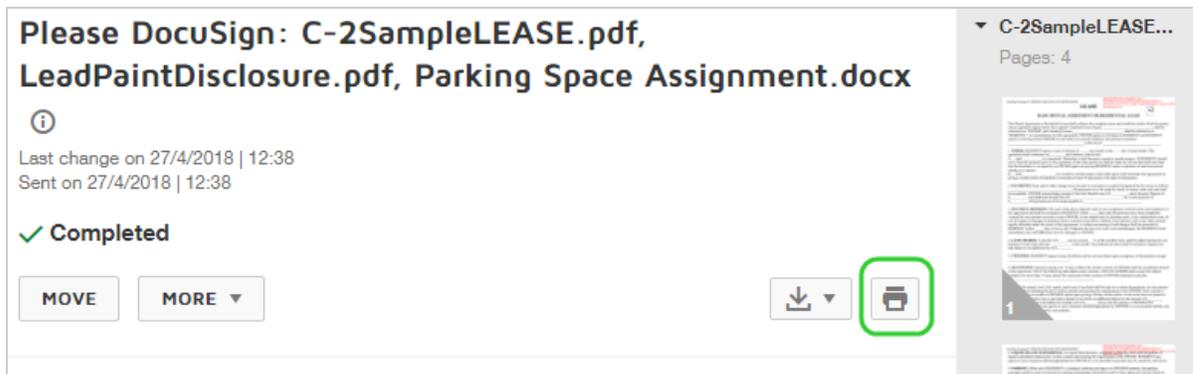
- For separate files in a ZIP file - check **All** for all files, or check the files you want to download as separate files in a ZIP file. **Document** gives you all of the documents in the envelope.
- For a single PDF of all files in the envelope - check **Combine all PDFs into one file**.



4. The selected files download to your local Downloads folder.

## To print documents

1. From the **Manage** page, locate the envelope that you want to print.
2. Click the envelope name to go to the Details view.
3. Click the **Print** icon at the top right of the view.



The PDF appears containing all documents in the envelope and the Certificate of Completion.

4. Use the controls provided to print or save a copy of your document.

## Troubleshooting: No Certificate of Completion in combined PDF option

### **Problem:**

If you download your documents using the **Combine all PDFs into one file** option and you do not get the Certificate of Completion in the resulting PDF, this is likely due to an account setting. Your DocuSign administrator can check and adjust this setting as needed.

### **Solution:**

In the DocuSign Admin view, under Signing Settings, there is a section called Envelope Delivery. In this section is the option **Attach certificate of completion to envelope**.

This setting determines whether the Certificate is included in the combined PDF file. If the option is checked, then you should see the Certificate included in both the downloaded combined PDF and in the PDF attached to completion emails.

For more information on Signing Settings administration, see [this help article](#).

## Shared Envelopes

With shared envelopes, users on the same account can view and take action on shared envelopes. Team members and delegates can help each other with management tasks, such as sending reminders or correcting recipient information.

For any shared envelope, if the owner is the sender, then you can view status and details, remind, correct, forward, void, or create a copy. If the owner is the signer, you can only view status and details; you cannot sign on their behalf or take any other actions. You cannot move shared envelopes within the owner's account.

### CONTENTS

[Setting up shared envelopes](#)

[How to view shared envelopes](#)

[How to take action on shared envelopes](#)

[How to return to your own envelopes from a shared view](#)

### **EXAMPLE – Offer Letters**

Your company is growing and your HR coordinators are busy sending offer letters to prospective employees. Offers are highly time sensitive, so to help manage the workflow, the HR coordinators share documents with one another, and with the hiring managers.

Hiring managers can check the status of their offers by reviewing the

coordinators' documents. If a hiring manager needs to retract an offer, any coordinator can quickly void it. If a prospect needs help accessing the offer, any coordinator can review the envelope and help the prospect by resending or correcting the recipient's email address as needed.

## Setting up shared envelopes

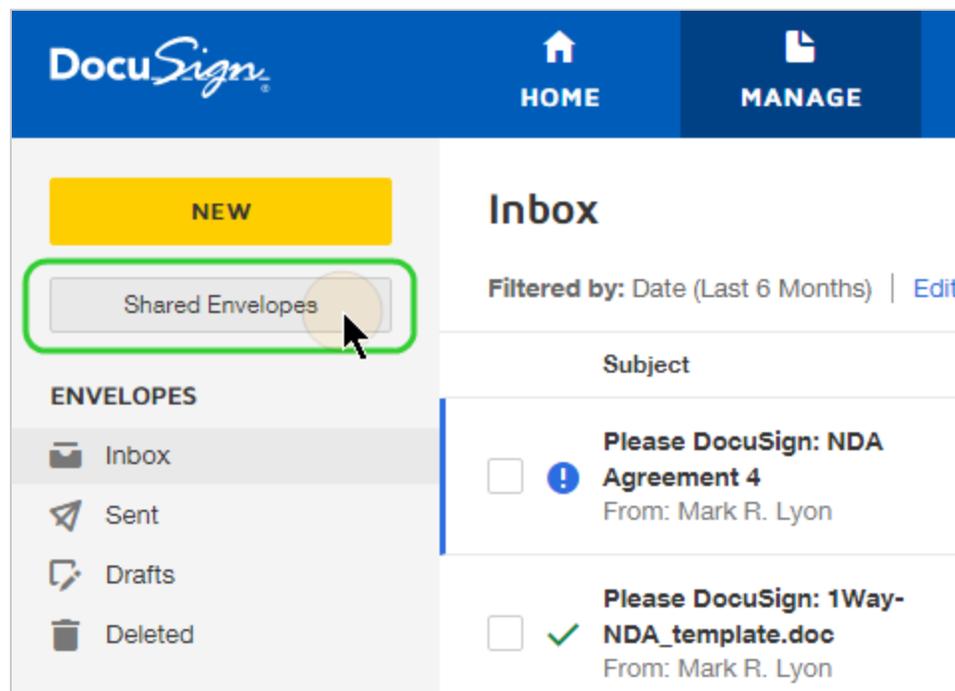
Sharing is enabled and managed by your DocuSign administrator. If your account administrator has enabled sharing for you, you can view and help manage the envelopes that are shared with you. If you are not able to follow the procedures in this topic, check with your account administrator to see if sharing is set up for you.

For information on how administrators enable sharing, see the [Envelope Sharing Between Account Users](#) guide.

## To view envelopes shared with you

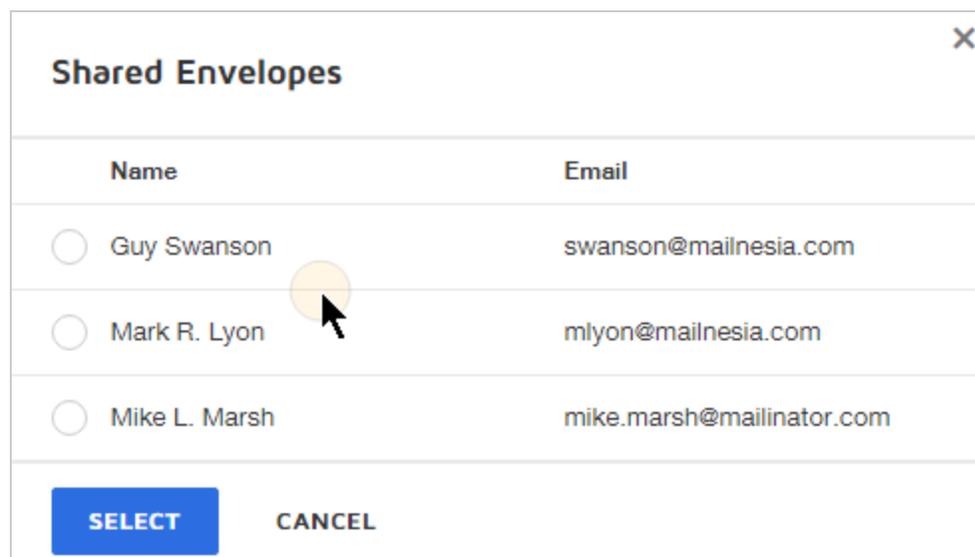
Your DocuSign administrator sets up sharing between users. You can view these shared envelopes from the Manage page.

1. Log in to your account and go to the **Manage** page.
2. In the left-hand navigation, click the **Shared Envelopes** button.



The screenshot shows the DocuSign user interface. At the top, there is a blue navigation bar with the DocuSign logo on the left, and 'HOME' and 'MANAGE' buttons on the right. Below the navigation bar, the left sidebar contains a yellow 'NEW' button, a 'Shared Envelopes' button (highlighted with a green box and a mouse cursor), and a list of envelope categories: 'ENVELOPES', 'Inbox', 'Sent', 'Drafts', and 'Deleted'. The main content area on the right is titled 'Inbox' and shows a list of filtered envelopes. The filter is set to 'Date (Last 6 Months)'. Two envelopes are visible: 'Please DocuSign: NDA Agreement 4' from Mark R. Lyon and 'Please DocuSign: 1Way-NDA\_template.doc' from Mark R. Lyon.

If you have access to others' envelopes, the Shared Envelopes window opens, listing all the user names of the people whose envelopes are shared with you.

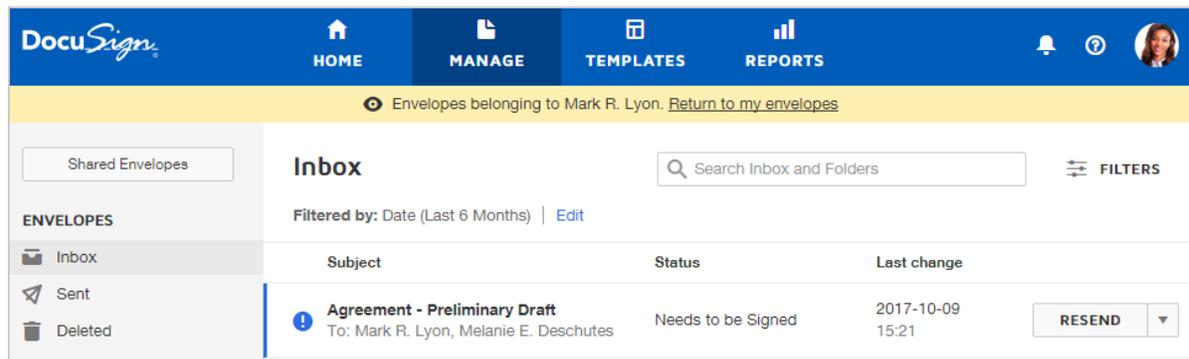


The screenshot shows a 'Shared Envelopes' dialog box with a close button (X) in the top right corner. The dialog contains a table with two columns: 'Name' and 'Email'. The table lists three users: Guy Swanson (swanson@mailnesia.com), Mark R. Lyon (mlyon@mailnesia.com), and Mike L. Marsh (mike.marsh@mailinator.com). A mouse cursor is pointing at the radio button next to Mark R. Lyon. At the bottom of the dialog, there are two buttons: 'SELECT' and 'CANCEL'.

Name	Email
<input type="radio"/> Guy Swanson	swanson@mailnesia.com
<input type="radio"/> Mark R. Lyon	mlyon@mailnesia.com
<input type="radio"/> Mike L. Marsh	mike.marsh@mailinator.com

3. Select a user and click **SELECT**.

The selected user's envelopes appear with a banner at the top of the list identifying the shared user.



This view, by default, is the Inbox view, showing all unfiled received documents. You can also select the Sent and Deleted envelopes to view. Draft documents are not shared.

4. The Folders list now represents the shared user's folders, and you can see their folders, with any documents filed within them.

Envelopes belonging to Mark R. Lyon. [Return to my envelopes](#)

Shared Envelopes

**ENVELOPES**

- Inbox
- Sent
- Deleted

**QUICK VIEWS**

- Action Required
- Waiting for Others
- Expiring Soon
- Completed

**FOLDERS**

- Completed Agreements
- In Process - 2017

**Completed Agreements**

Filtered by: Date (Last 6 Months) | [Edit](#)

Subject	Status
<b>Please DocuSign: Time Card.xlsm</b> From: Melanie E. Deschutes	Voided

[Looking for more?](#) | [Edit your filters](#)

## To take action on a shared envelope

You can take action on a shared envelope if the shared user is the sender. Available actions include: correct, resend, void, create a copy, and forward. You cannot move a shared envelope.

1. From the Manage page, select **Shared Envelopes**, and select the shared user whose envelopes you wish to act on.
2. Locate the envelopes, either by scanning the list, or through searching, or using the Folder or filter options.
3. Click on the envelope to open the Details view.

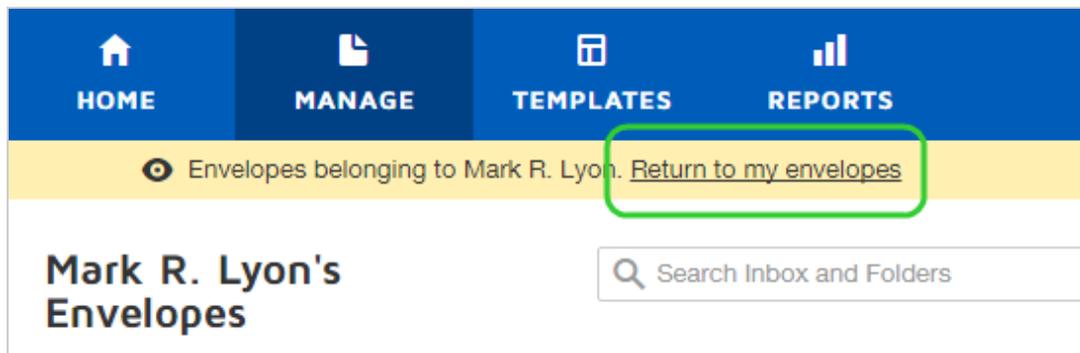
4. Use the action buttons and the **More** menu to correct, resend, void, forward, or copy the envelope.

**Note:** only completed envelopes can be forwarded.

The screenshot displays a DocuSign envelope interface. At the top, a yellow banner indicates the envelope belongs to Mark R. Lyon and provides a link to 'Return to my envelopes'. The main title is 'Please DocuSign: Confidentiality Disclaimer Statement.pdf' with an information icon. Below the title, it shows the last change on 2017-10-16 at 16:17. The status is 'Waiting for Others'. Action buttons include 'RESEND', 'CORRECT', and 'MORE' (with a dropdown arrow), along with download and print icons. A 'Recipients' section is visible, with a 'SIGNING ORDER' icon. The recipients are listed in two columns: 'CURRENT' and 'WAITING'. Under 'CURRENT', recipient 1 is Frank Hsi (frank.hsi@mailnesia.com) with a 'Needs to Sign' status. Under 'WAITING', recipient 2 is Axel Aire (axelaire@mailinator.com) with a 'Needs to Sign' status. On the right, a preview of the document 'Confidentiality Discla...' is shown, indicating it has 1 page.

## To return to your own envelopes

When viewing shared envelopes, you remain in the shared user's view as you navigate around the application. When you are ready to view your own envelopes again, simply click the **Return to my envelopes** link in the sharing banner at the top of the page.



## View Data Changes

The data changes view provides a way to see the information that was added or changed during signing. For the documents you send, data changes offers a view that highlights the changed or added information.

You can view data changes on in process, completed, and voided documents. The data changes option appears as soon as at least one recipient has finished signing, and you can view the data changes for any completed recipients.

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

The data highlighting is available for changes to the following field types:

- Optional Signature
- Optional Initials
- Title
- Company
- Date Signed
- Email
- Text
- Checkbox
- Radio
- Dropdown
- Formula

For Text fields protected by the **Hide text with asterisks** property, the signer's entry remains concealed when you view data changes. To obtain concealed data, and all other envelope data, use the [download form data](#) feature.

### To view data changes

1. From the Manage page, locate the in process, completed, or voided envelope for which you want to view data changes.
2. Click the envelope name to go to the Details view.
3. Click **More** and select **Data Changes**.

### Lease Agreement for 555 Poplar

Sent On: Nov 9, 2016

✓ **Completed**

MOVE TO ▾ MORE ▾

Delete  
Forward  
Data Changes  
Create a Copy  
History

SIGNING ORDER

Recipients		
1 ✓ <b>Melanie D</b> melanie.de		<b>Signed</b> on Nov 9, 2016
✓ <b>Fred Marshall</b> fmarshall@maininator.com		<b>Signed</b> on Nov 9, 2016
2 <b>Private Message:</b> For your unit, I will need you to provide a \$300 deposit. After you complete the lease and disclosure form. Call me at 555-111-0000 to arrange how you'd like to pay the deposit. Thanks.		
3 ✓ <b>Lissa Burnky</b> lissa.burnky@gmail.com		CC <b>Copy Received</b>

An image of the document appears with all data changes highlighted in yellow.  
Completed optional signatures or initials are outlined in red.

The following known lead-based paint and/or lead-based paint hazards are present in this dwelling:

The garage door was painted with lead-based paint in 2001.

\_\_\_\_\_ The landlord does not have knowledge of lead-based paint and/or lead-based paint hazards in the dwelling.

2. Records and documents available to the landlord (check one of the following):

The landlord has provided the tenant with all available documentation regarding lead-based paint and/or lead-based paint hazards in the dwelling.

TENANT CONFIRMATION 

4. The highlighting and outlines are only seen in the data changes view and are not part of the actual document.

## Form Data

You can view and download envelope and field data from any in process, completed, or canceled envelope that you sent or is [shared with you](#). Recipients who are also full administrators on an account can view form data for any envelopes sent to them from another user on the account.

**TIP:** To use this feature, your DocuSign administrator must enable the Sending Setting **Allow sender to download form data**. If you are not able to follow the procedures below, contact your administrator to confirm the feature is enabled on the account.

## CONTENTS

[View form data](#)

[Download form data](#)

[Form data and hidden text](#)

## To view form data

You can view form data from the Manage page or the envelope details view.

1. From the Manage page, locate the envelope you want to review.
2. Click the actions menu for the envelope and select **Form Data**.

The screenshot shows the DocuSign interface with a blue navigation bar containing 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. Below the navigation bar, the page title is 'Completed'. There is a search bar labeled 'Search Quick Views' and a 'FILTERS' button. Below the search bar, it says 'Filtered by: Date (Last 6 Months) | Edit'. The main content is a table with columns: 'Subject', 'Status', 'Last change', and 'Folder'. There are three rows of documents, each with a checkbox and a green checkmark. A context menu is open over the third document, listing options: 'Forward', 'Create a Copy', 'Save as Template', 'History', 'Form Data' (highlighted with a green box and a mouse cursor), and 'Delete'. A 'MOVE' dropdown menu is also visible above the context menu.

Subject	Status	Last change	Folder
<input type="checkbox"/> <input checked="" type="checkbox"/> <b>Please DocuSign: Contract</b> To: Melanie E. Deschutes, Fred Marshall	Completed	07-Feb-18 13:10	
<input type="checkbox"/> <input checked="" type="checkbox"/> <b>Please DocuSign: Conference Registration</b> To: Sam Signer	Completed	01-Feb-18 17:50	
<input type="checkbox"/> <input checked="" type="checkbox"/> <b>Please DocuSign: Permission form - Media.docx</b> To: Bulk Recipient	Completed	01-Feb-18 17:39	

3. The envelope form data appears, presenting the envelope information and all of the recipient fields and their values.

**Envelope Form Data****Envelope ID**

031dba75-04ac-4817-b02c-033adbb2719c

**Subject**

Please DocuSign Contract

**Sent**

07-Feb-18 | 13:09

**PRINT****Status**

Completed

**All Envelope Data**

Field	Value
Text 10d24016-036a-41d2-b3e7-cb6cd1cdbdc3	Winston Brown
Date Signed 10da7b0d-b2cc-4068-bab4-a90c094002a9	7/2/2018   1:09 PM PST
Text 81f9f7e6-041f-42fc-a80e-a46d7cb892e8	\$401,987.00
Text 613e5de4-b634-4b59-9367-ed022cc9393e	Security Code 449876
Name 971736f5-2ab4-4a22-9a8d-c1cbaf6cdc2e	Fred Marshall

**Recipient Form Data for: Melanie E. Deschutes [melanie.deschutes@gmail.com]**

Field	Value
Text 10d24016-036a-41d2-b3e7-cb6cd1cdbdc3	Winston Brown
Date Signed 10da7b0d-b2cc-4068-bab4-a90c094002a9	7/2/2018   1:09 PM PST

**Recipient Form Data for: Fred Marshall [fmarshall@mailinator.com]**

Field	Value
Text 81f9f7e6-041f-42fc-a80e-a46d7cb892e8	\$401,987.00
Text 613e5de4-b634-4b59-9367-ed022cc9393e	Security Code 449876
Name 971736f5-2ab4-4a22-9a8d-c1cbaf6cdc2e	Fred Marshall

**DOWNLOAD**

## Download form data

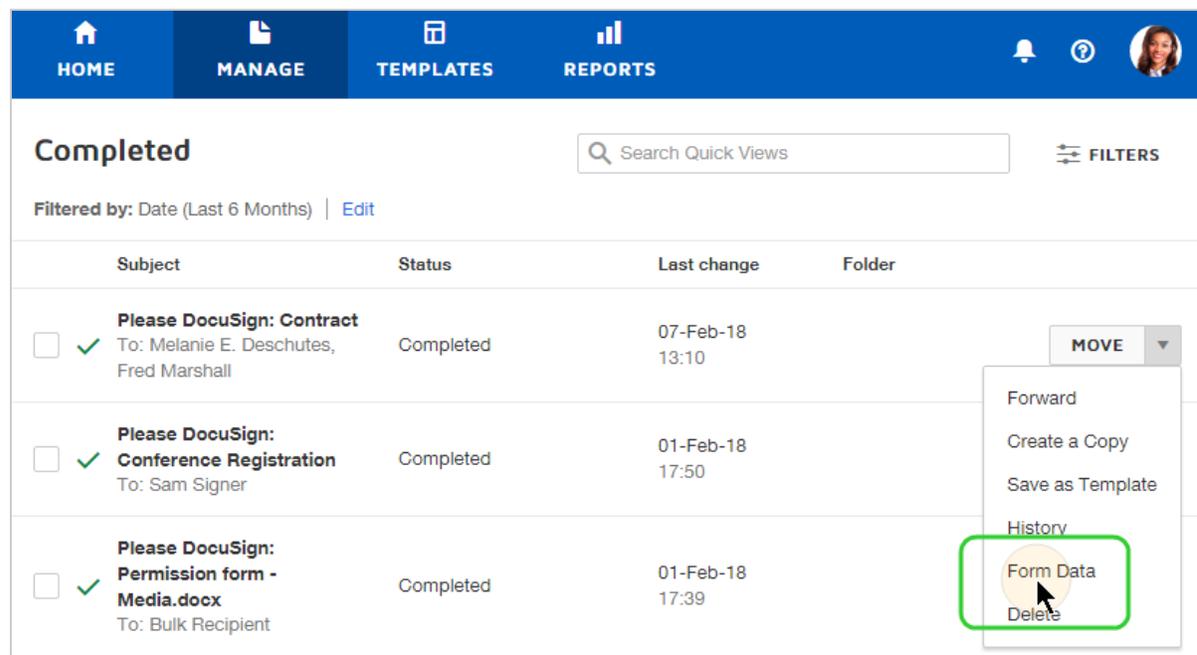
You download form data to a CSV file. The file contains rows for each field in the documents, with the envelope ID, the recipient name and email, and the field name and any entered value. The Recipient Signed column represents the date and time when the recipient finished signing.

	A	B	C	D	E	F
1	EnvelopeId	Recipient Name	Recipient Email	Recipient Signed	Field	Value
2	eb06e475-af89-4549-8df1-a682ffb0c395	Gregory Barney	grich2@mailnesia.com	8/28/2017 23:23	Name 5759ba78-16e0-491a-8927-23d7d8f2bbb8	Gregory Barney
3	eb06e475-af89-4549-8df1-a682ffb0c395	Gregory Barney	grich2@mailnesia.com	8/28/2017 23:23	Text ba59a82a-ccfc-4589-834f-ab6803fd0543	\$12,109.00
4	eb06e475-af89-4549-8df1-a682ffb0c395	Gregory Barney	grich2@mailnesia.com	8/28/2017 23:23	Checkbox a6443d7a-1cbd-41a1-9742-526adbcf633e	X

**NOTE:** You cannot download data from draft documents or documents sent to you by others.

## To download form data

1. From the Manage page, locate the envelope you want to review.
2. Click the actions menu for the envelope and select **Form Data**.



The screenshot shows the DocuSign interface with a navigation bar at the top containing 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. Below the navigation bar, there is a search bar labeled 'Search Quick Views' and a 'FILTERS' button. The main content area is titled 'Completed' and shows a list of documents. The list is filtered by 'Date (Last 6 Months)'. The table below shows three documents, all with a status of 'Completed'.

Subject	Status	Last change	Folder
<input type="checkbox"/> <input checked="" type="checkbox"/> <b>Please DocuSign: Contract</b> To: Melanie E. Deschutes, Fred Marshall	Completed	07-Feb-18 13:10	
<input type="checkbox"/> <input checked="" type="checkbox"/> <b>Please DocuSign: Conference Registration</b> To: Sam Signer	Completed	01-Feb-18 17:50	
<input type="checkbox"/> <input checked="" type="checkbox"/> <b>Please DocuSign: Permission form - Media.docx</b> To: Bulk Recipient	Completed	01-Feb-18 17:39	

A context menu is open over the 'Form Data' option for the document 'Please DocuSign: Permission form - Media.docx'. The menu items are: Forward, Create a Copy, Save as Template, History, Form Data (highlighted with a green box and a mouse cursor), and Delete. A 'MOVE' button is also visible in the top right corner of the menu.

3. In the Envelope Form Data view, at the bottom of the window, click **DOWNLOAD**.

The form data is exported to a CSV file and saved to your local Downloads folder.

## Form data and hidden text

Form data is especially useful if you use the field property **Hide text with asterisks** to obscure text entries for privacy and security purposes. The data entered by the recipient, though hidden in the document PDF, is included and visible in the form data.

### EXAMPLE — Hidden Text

You offer direct deposit for expense report reimbursement to your staff. You create a DocuSign template for employees to sign up for this convenience. The template includes text fields for their bank routing and account numbers. These

fields have the **Hide text with asterisks** property set, so their bank information is concealed on the document.

You use your template to send a document to each employee, and everyone who wants to sign up for direct deposit completes the document, and provides their bank information. When you view or download the form data, you have all the document and field data, including the signer's bank account information, and you can sign them up.

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## Envelope Status

Every envelope that you create or receive through DocuSign, has a status. The status indicates the current state of the transaction. This list defines all of the possible statuses:

- **Draft.** For an envelope you created and then saved without sending. Draft envelopes are stored in your account for 30 days from the date they were created. After 30 days, drafts are removed from your account and purged from the system.
- **Sent.** The email notification has been sent to at least one recipient. The envelope remains in this state until all recipients have viewed the documents. (Shown in Reports and History only)

- **Delivered.** All recipients have viewed the documents. (Shown in Reports and History only)
- **Waiting for Others.** The envelope has at least one recipient who has yet to complete their action. The recipient status in the Details view shows whether the outstanding recipients need to sign (Needs to Sign) or view (Needs to View). From the Manage page, you can see whose turn it is to sign by hovering over the status.

The screenshot displays the 'Waiting for Others' section of the DocuSign interface. At the top, there is a navigation bar with 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. Below this, the title 'Waiting for Others' is followed by filter options: 'Last 6 Months', 'By Anyone', and 'Edit'. A search bar labeled 'Search Quick View' is also present. The main content is a table with the following columns: Subject, Recipients, Last change, and Folder. Two rows are visible in the table, each with a 'RESEND' button. A tooltip is overlaid on the first row, indicating the status 'WAITING FOR Fred Marshall' and the time 'Sent on 2017 July 18 | 14:50'. The tooltip also contains a link to 'Waiting for Others'.

Subject	Recipients	Last change	Folder
Evaluations for	Melanie E. Deschutes, Silverman, Abby e Elisabeth Schreiber	2017 July 19   13:27	
Agreement	Marshall, Melanie E. chutes	2017 July 18   14:50	

- **Needs To Sign.** You are a recipient and you need to sign.
- **Needs to View.** You are a certified delivery recipient and you are required to view the document.
- **Correcting.** The sender started to correct an in process envelope and has not yet saved his changes. In this state, any outstanding signers are unable to view or sign. The sender must either save or cancel his changes in order to move the envelope out of the Correcting status.

- **Voided.** The sender canceled the envelope before it was completed. Recipients can no longer view or sign the document. Voided documents appear in your sending account as voided. You can still view and print the document, though it has a "VOID" watermark.
- **Declined.** A signer has declined to sign.
- **Completed.** An envelope is completed once all of the recipients have completed their actions.
- **Expired.** A document that has exceeded its set expiration period without completing will expire. Recipients can no longer view or sign the expired document. Expired documents appear in your sending account as voided. You can still view and print the document, though it has a "VOID" watermark.
- **Delivery Failure.** The email notification did not reach the recipient. Review the [Details](#) to see which recipient status is listed as **Auto Responded**. For this recipient, check the email address you entered and [correct](#) the document to fix any errors. From the Manage page, you can see which recipient delivery failed by hovering over the status warning.

**Sent**

DELIVERY FAILURE

Brad Malion  
Email bounced

media services brad Malion

Brad Malion

2017  
July 19  
| 13:55

**CORRECT**

	Recipients	Last change	
<input type="checkbox"/>	Brad Malion	2017 July 19   13:55	<b>CORRECT</b> ▼

- **Authentication Failed.** At least one signer has failed the authentication check. You can either [send a reminder](#) to the recipients, which gives the signer another chance to access and pass the authentication. Or you can [correct](#) the envelope and modify the

authentication setting. The [envelope History](#) provides additional detail on the authentication failure.

- **Completed or Voided - Purging Soon.** This status indicates that your account is using document retention to purge completed and voided envelopes from the system after a set holding period. See [Purge Documents](#) for more information.
- **Completed or Voided - Purged.** Your account document retention policy implemented a purge process on the envelope. The purge holding period has concluded and the envelope documents have been purged from the system. See [Purge Documents](#) for more information.

## Purge Envelopes

Envelope purging is a process to permanently remove documents and their field data from completed and voided envelopes after a specified retention period. Warnings of pending purges are shown in your account and through email notifications, giving you a chance to download the documents before they are purged. By default, documents are kept in your account indefinitely, but your account administrator can choose to set up purging rules and specify a document retention period.

**Note:** Administrators refer to the [Document Retention guide](#) for information on how to set up and manage purging rules for all account envelopes.

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[What is purging?](#)

[Example - Envelopes purged 30 days after completion](#)

[What happens when an envelope enters the purge queue?](#)

[Purge notifications](#)

[Related topics](#)

## What is purging?

Purging is an automatic process to remove documents from completed or voided envelopes after a set retention period. Your DocuSign administrator enables purging and specifies the retention period for your account. The retention settings also specify if the envelope's meta data is purged along with the documents. Meta data refers to the fields and their contents.

When an envelope has been completed or voided for the duration of the retention period, it enters the purging queue. The sender and any recipients who hold the envelope in a DocuSign account are notified by email of the pending purge, providing an opportunity to download the documents if desired. Envelopes remain in the purging queue for 14 days, after which the documents in the envelopes are removed permanently from the DocuSign system and cannot be recovered by anyone, including DocuSign Support.

If meta data is not purged, then you can still access the completed field data using the [download form data](#) option.

### **Example - Document Retention set to 30 days; meta data is also purged**

An envelope you sent is completed by all signers on October 31st. At that point, the document retention count down starts and 30 days later, the envelope moves into the purge queue. The envelope remains in the queue for 14 days, with notifications issued at the beginning and again when the queue has 7 days remaining. During this period, you can access the documents in the envelope,

download and print them, and download form data.

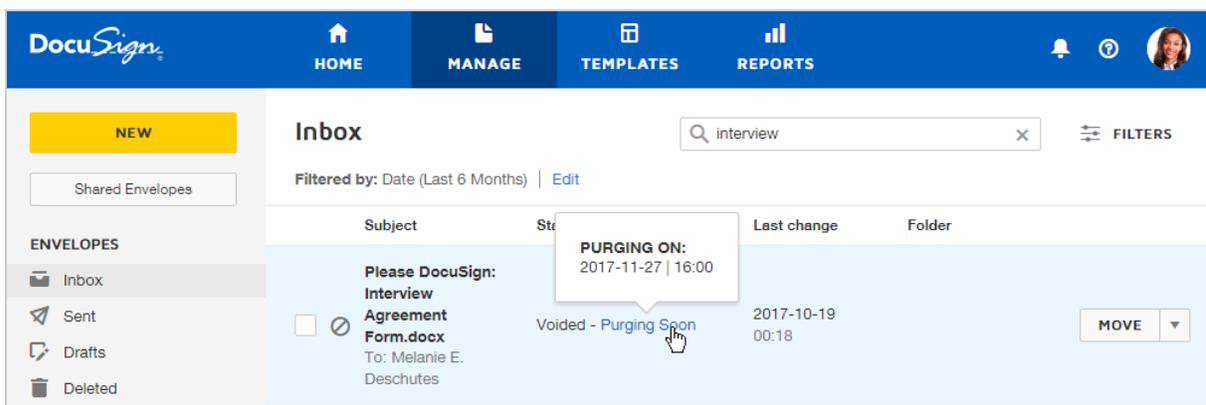
At the end of the 14 days, the envelope is purged, removing the documents and the meta data from DocuSign. The envelope remains in your account, but you can no longer access the documents or download the form data.

## What happens when an envelope enters the purge queue?

When an envelope has been completed or voided for the duration of the account's document retention setting, it enters a 14 day purge queue. In your account, you can see indications of this status from the Manage page and the envelope details view. Email notifications are sent as described below in [Purge notifications](#).

The purpose of this holding queue is to give all parties a chance to download the documents and meta data before they are permanently removed from the system.

- **Manage page.** The envelope status includes a "Purging Soon" warning label. Hover over this label to see the date and time on which the envelope will be purged.



The screenshot displays the DocuSign user interface. At the top, there is a navigation bar with 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS' tabs. Below this, the 'Inbox' section is visible, filtered by 'Date (Last 6 Months)'. A search bar contains the text 'interview'. The main content area shows a table of envelopes. One envelope is highlighted, with a tooltip indicating it is 'VOIDED - Purging Soon' and will be purged on '2017-11-27 | 16:00'. The envelope details include the subject 'Please DocuSign: Interview Agreement Form.docx' and the recipient 'To: Melanie E. Deschutes'. The status is 'Voided - Purging Soon' and the last change date is '2017-10-19 00:18'. A 'MOVE' button is visible next to the envelope.

Subject	Status	Last change	Folder
Please DocuSign: Interview Agreement Form.docx To: Melanie E. Deschutes	VOIDED - Purging Soon 2017-11-27   16:00	2017-10-19 00:18	

- **Envelope details view.** The details view includes a warning with the pending purge date and time.

**Please DocuSign: Interview Agreement Form.docx** ⓘ

Last change on 2017-10-19 | 00:18  
Sent on 2017-10-18 | 11:47

⊘ **Voided** - Envelope has expired. ⚠ **The documents in this envelope will be purged on 2017-11-27 | 16:00**

MOVE MORE ▾

⬇️ 🖨️

**Recipients** SIGNING ORDER

**Melanie E. Deschutes**  
melanie.deschutes@gmail.com ✍️ Needs to Sign

**Interview Agreement...**  
Pages: 1

If you click on the document thumbnail, the preview shows the pending purge date and time.

DocuSign

HOME MANAGE TEMPLATES REPORTS

The documents in this envelope will be purged on: 2017-11-27 | 16:00

**Interview Agreement Form.docx**  
Pages: 1

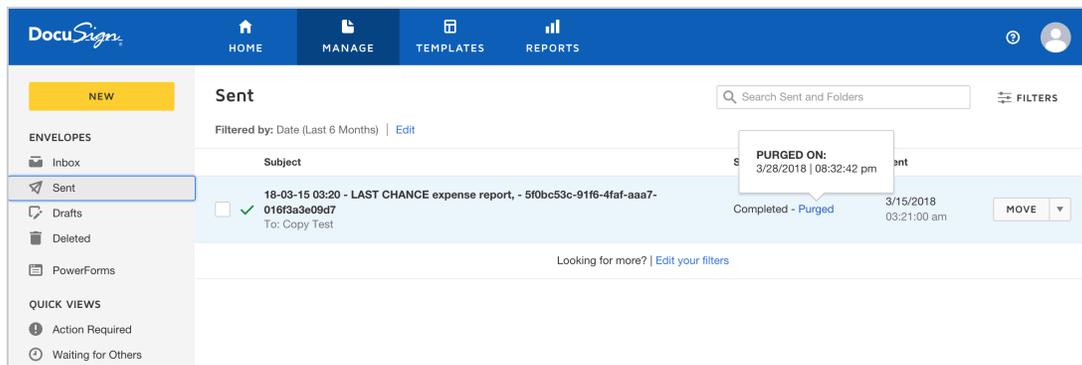
**DEMONSTRATION DOCUMENT ONLY  
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE  
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200  
www.docusign.com**

**Interview Use Agreement Form**  
Created January 2011

The undersigned does hereby authorize name/representative to record audio and/or video files.

\_\_\_\_\_  
Name of Person

At the end of the 14 days, the envelope documents are purged. The envelope status updates to reflect the new state, and you can no longer view document thumbnails or download or print the documents. If the meta data is also purged, then you can no longer download the form data for the envelope.



The envelope itself remains in your account, and is still available for reporting, and you can still view and download the Certificate of Completion for the envelope. The envelope details view shows the detailed information about the document purge, including the date and time of the purge.

## Purge notifications

The sender and any signers who hold an envelope in a DocuSign account can receive warning notifications regarding pending purge actions. To receive notifications, you must enable the appropriate items in your **My Preferences > Notifications**. There is one each for sending (for the envelopes you send) and recipient (for the envelopes you receive).

**DocuSign** HOME MANAGE TEMPLATES REPORTS

**ACCOUNT**

- Personal Information
- Electronic Notary Public
- Privacy & Security
- Regional Settings
- Contacts

**SIGNING AND SENDING**

- Custom Fields
- Template Matching
- Connected Apps
- Notifications **2**
- Stamps

### Notifications

SAVE CANCEL

#### Sending Notifications

Notify me when I am the sender and:

- Select All
- An envelope is complete
- A signer assigns an envelope to someone else
- A signer declines to sign
- A signer withdraws consent to do business online
- The first time each recipient views an envelope
- Envelope delivery to a recipient fails
- A signer's offline signature fails to synchronize
- Documents will be purged from the system
- A comment is posted in an envelope I've sent

All comments  
 Only comments that mention me or are private to me

#### Recipient Notifications

Notify me when I am a recipient and:

- Select All
- I have an envelope to sign
- An envelope is completed
- I am a copy-only recipient
- I am an acknowledge recipient
- Another signer declines to sign
- The sender voids an envelope
- The sender corrects an envelope
- A signer assigns an envelope to me
- Documents will be purged from the system
- My fax is received

Deschutes Properties, Inc. (Default)  
melanie.deschutes@gmail.com  
349515

Go to Admin

**My Preferences 1**

Switch Accounts

Switch to Classic

Feedback

Log Out

https://appdemo.docusign.com/preferences

There are two notifications issued during the purge process. Each email explains the envelope's documents will be deleted and provides a link to the envelope:

- When an envelope enters the purge queue at the start of the 14 day countdown.
- When there are 7 days remaining in the queue.

## Related topics

- [Envelope Status](#). Draft envelopes are purged according to a separate rule. Drafts are retained for only 30 days, and then deleted from the system without further notification.
- [Document Retention](#). Information for administrators on how to set up document retention for an account.

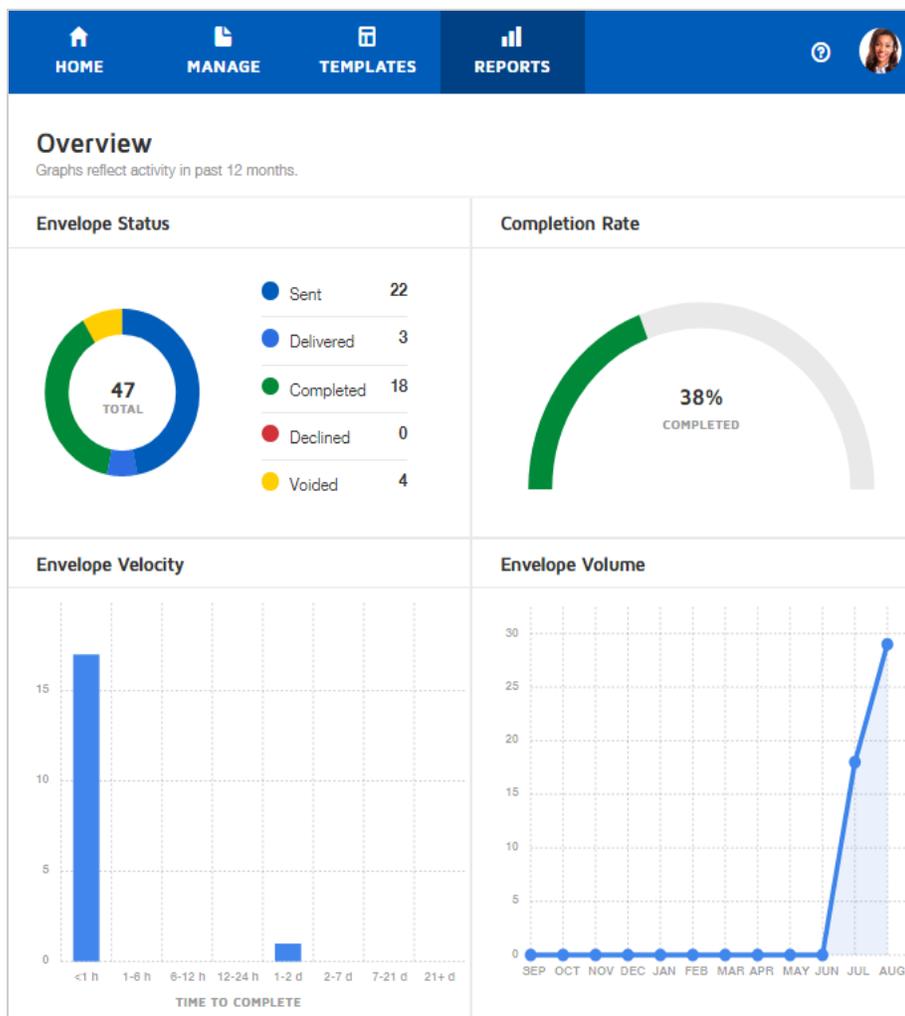
## Using Reports

The Reports feature allows users and administrators to run, customize, schedule, and download and print reports for their account. Report data is generated continuously, and reports contain near real-time data from document activity.

When users run reports, they see information from their own user activity only. Account administrators see all account-level activity. Reports run in the application can return up to 5000 rows of data.

## Reports Overview

The **Reports Overview** provides a look at key metrics on your sent envelope activity. Use the Overview to quickly see overall envelope status, time to complete, and volume over time for the envelopes you send. The Overview covers document activity for the past 12 months and is available to all account users.



## Standard Reports

Beyond the Overview, there are several **standard reports** provided to quickly view information about your account. These reports are categorized as follows:

- **Envelope** - available to all users; includes data on the envelopes you send
- **Recipient** - available to all users; includes data on the recipients of the envelopes you send

- **Usage** - for account administrators only; reflects activity and usage for the entire account

The screenshot shows the DocuSign interface with a top navigation bar containing 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The 'REPORTS' tab is active. On the left is a sidebar with a search bar and a filter table. The main content area displays a list of 12 reports.

Overview	
TYPE	
All	12
Envelope	6
Recipient	2
Usage	4
Custom	0

12 Reports	
<b>Recipient Activity Report</b>	Detail, status and completion information
<b>Envelope Report</b>	All envelopes sent or received by me.
<b>Envelope Status Report</b>	Totals by status.
<b>Envelope Velocity Report</b>	Envelope completion time.
<b>Envelope Volume Report</b>	Status totals for specified time periods.
<b>Envelope Authentication Report</b>	Envelope authentication details.
<b>Envelope Recipient Report</b>	Information about envelope recipients.
<b>Recipient Authentication Report</b>	Identity verification data.
<b>User Activity Report</b>	Account activity by user.
<b>Group Activity Report</b>	Account activity by group.
<b>Account Activity Report</b>	Summary user, envelope, and template data.
<b>Account Authentication Report</b>	Summary authentication activity and results.

By default, all reports run with the following filters:

- **Date Range:** Month to Date
- **Envelope Status:** Any
- **Sent By:** Any

## Custom Reports

You can alter the report filters to modify the information returned in the report. Set filters to create custom reports and save them for later use. [Learn more...](#)

## Schedule Reports

Finally, you can schedule reports to run automatically, download report data to a CSV file, and print reports. [Learn more...](#)

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## View and Modify Reports

When you select a report to view from the Reports list, the default report data is shown. From this default result set, you can modify the date range, filters, and columns displayed

to deliver the information you want to see. The results reflect the relevant document activity for your account. You can also export a report to a CSV file, or print your report for further use and analysis.

#### **EXAMPLE — User Activity Report**

You're the administrator for your company's DocuSign account and you want to find out if the users on the account are taking full advantage of this great productivity and money-saving business tool. You select the User Activity Report and modify the date range to select Year to Date. You want to see everything, so the default report filter of any sender works for you.

Examining the report data, you can see the activity for every DocuSign user in your company, including how many documents each person sent. You export the data and later you'll reach out to the low-usage users to see if they need some additional training or other help with DocuSign.

## CONTENTS

[Modify report criteria to show a particular set of data](#)

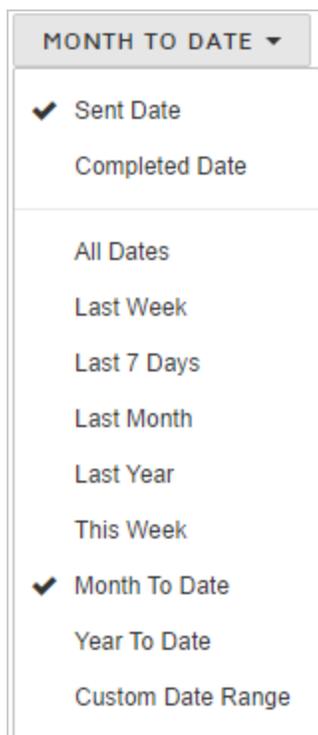
[Create or edit a custom report and save it for future use](#)

[Learn about scheduling reports or how to download a report](#)

## To modify report criteria

1. From the Reports page, select a report to view.
2. In the Report Details view, modify the report criteria to display the data you want, using any of the following:

- **Date Range.** Use the drop-down to select a date range for your report. You can choose to filter by either Sent or Completed Date, and then select one of the predefined ranges, or select Custom Date Range and enter your own range.



- **Edit Filters.** Modify the filter criteria to focus on the information you want to see. Different reports offer different filters. Depending on the report, you can enter criteria to select particular senders, envelope status, document subject, or recipient names. Enter your criteria and click **DONE**. The report data updates to reflect your changes.

**Edit Filters** ✕

---

**Envelope Status** Any **Recipient Contains**

**Subject Contains**

Sent By:  Any  Specific Users  Specific Groups

**DONE** **CANCEL**

- **Edit Columns.** Add or remove the columns displayed in the report. Reorder columns by selecting the drag handles and dragging the column to the desired place in the order. Click **DONE** to save your changes and update the report display. The report data updates to reflect your changes.

### Edit Columns

AVAILABLE	<a href="#">Add All</a>	SELECTED	<a href="#">Remove All</a>
Search		Search	
# of Recipients	ADD	Subject	REMOVE
# of Signers	ADD	Status	REMOVE
Reason for Declining	ADD	Sender	REMOVE
Remaining Signatures	ADD	Recipient	REMOVE
Sender Country	ADD	Sent On	REMOVE
Sender Email	ADD	Last Activity	REMOVE

**DONE** CANCEL

## To create and save a custom report

Starting from a standard report, select the criteria, such as date range or filters, and define how to display the results. Once you save your custom report, you can access it any time you want. You can save up to 100 custom reports at a time.

1. From the Reports page, select a report to start with.
2. In the Report Details view, modify the report to display the desired information by selecting the date range, filters, and columns to apply to your custom report.

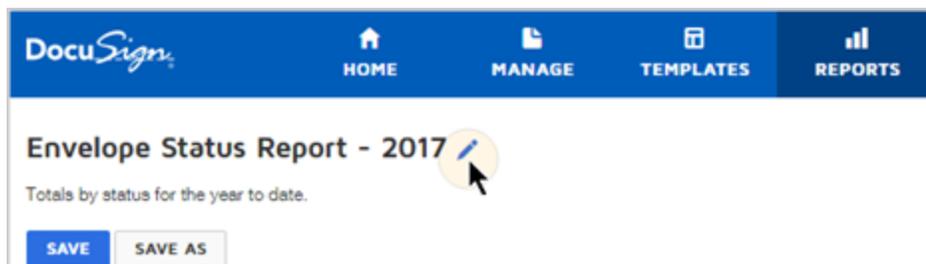
3. To save the custom report, click **SAVE AS...**

**Note:** If you started with a custom report, you can save your changes to the existing custom report (click **SAVE**), or save as a new custom report (click **SAVE AS...**).

4. In the **Save as Custom Report** dialog box, provide a unique report title and a description, and click **SAVE**.

Your custom report is saved and appears on the Reports list under **Custom**.

5. To edit an existing custom report, select your report from the Reports page:
  - To modify the report results, make the desired changes to the report criteria, and click **SAVE**.
  - To edit the title or description of your custom report, click the **pencil icon** to the right of the title:



## Schedule, Download, or Print Reports

You can set up a recurring schedule to automatically run reports. You can set a schedule for any report, and, optionally, have the report sent by email as a zipped CSV file to

yourself and other recipients. You can schedule both standard and saved custom reports. Scheduled reports start running at midnight, based on the time zone setting for your account.

You can also download or print reports, either from the Report Details view or from the history of a previously scheduled report.

**Note:** If you choose to send the report by email, be aware that many email providers and firewalls reject emails with a .zip attachment.

## CONTENTS

[Limits for reports](#)

[Download or print a report](#)

[Schedule or edit a report schedule](#)

[Download a scheduled report](#)

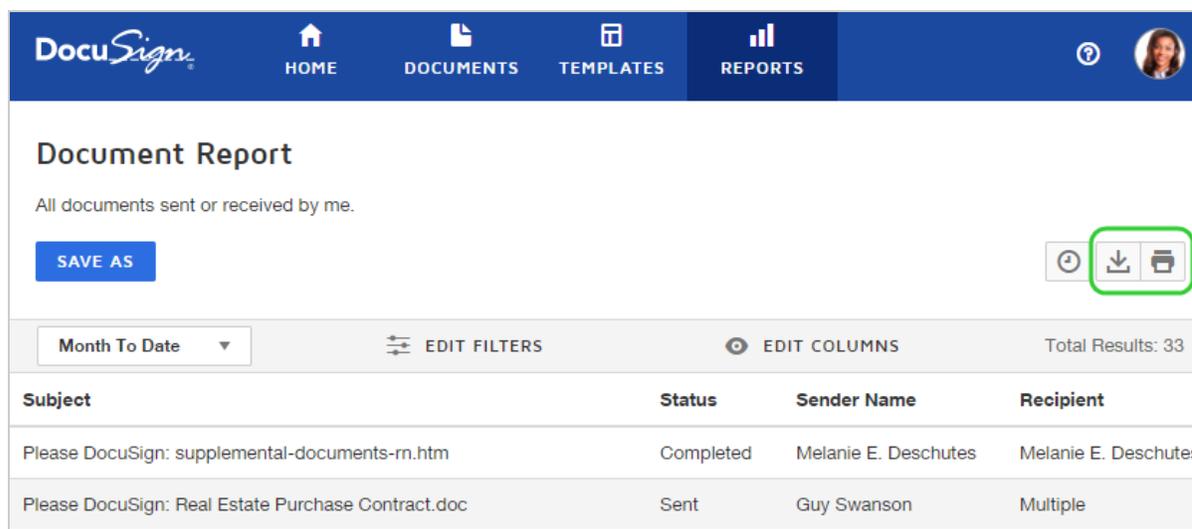
## Limits

The following limits apply to reports:

- You can have up to 20 scheduled reports
- You can set schedule start and end dates for up to 365 days from the current date
- The History for a scheduled report contains the last 10 report instances
- Report instances are retained in the History for up to two years from the run date
- A scheduled report can contain up to 100,000 rows - additional data is truncated

## To download or print a report

1. From the Reports page, select a report to view.
2. In the Report Details view, modify the report to display the desired information.



**Document Report**  
All documents sent or received by me.

[SAVE AS](#)   

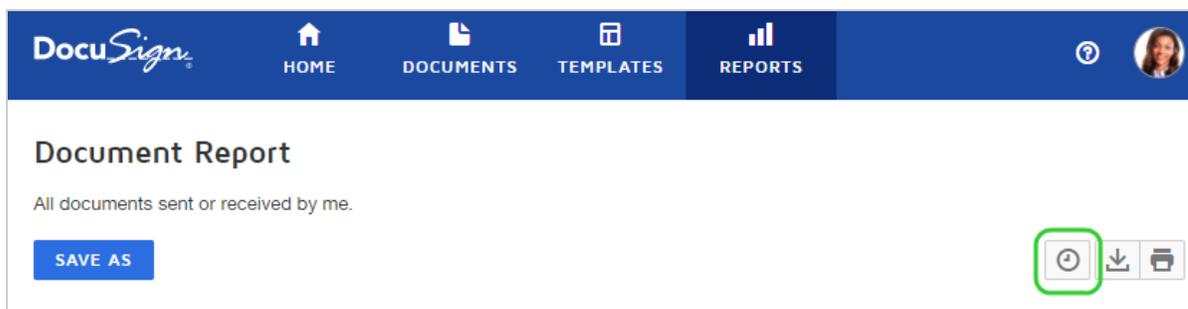
Month To Date  EDIT FILTERS  EDIT COLUMNS Total Results: 33

Subject	Status	Sender Name	Recipient
Please DocuSign: supplemental-documents-rn.htm	Completed	Melanie E. Deschutes	Melanie E. Deschutes
Please DocuSign: Real Estate Purchase Contract.doc	Sent	Guy Swanson	Multiple

3. To download the report, click the download icon.  
The report data displayed downloads as a CSV file to your specified downloads folder.
4. To print the report, click the print icon.

## To schedule or edit a report schedule

1. From the Reports page, select a standard or a saved custom report to view.
2. In the Report Details view, to schedule the report, click the clock icon.



3. In the Schedule Report dialog, set up or edit the schedule details:
  - a. Set the report frequency (e.g., Weekly on Mondays), and the start and end dates.  
**Note:** Start and end dates refer to the time frame in which to run the scheduled report; they do not impact the date range of the report itself.
  - b. (Optional) To send the report to recipients by email, select the appropriate options. To send the report to others, select the option and enter the recipient email addresses, separated by a comma.
  - c. (Optional) Enter a custom email subject. Only the first 142 characters are saved.
4. Click **DONE** to save the scheduled report.  
On the Reports list, a Scheduled flag is added to the report title:

<b>Envelope Status Report</b> Totals by status.	 <b>Scheduled</b> Last Delivered 13-Mar-18   01:05	<b>VIEW</b> ▼
<b>Envelope Velocity Report</b> Envelope completion time.		Edit Schedule Deactivate

5. To edit a scheduled report, locate the report in the Reports list, then click the report menu and select **Edit Schedule**.
6. In the Schedule Report dialog, you can edit the schedule details or cancel the schedule by clicking **DEACTIVATE**.

### To download a scheduled report

1. From the Reports list, locate the scheduled report you wish to download.
2. Click the report menu and select **Edit Schedule** to open the Schedule Report dialog.
3. In the **History** section, locate the specific report record you wish to download and click the download icon.

History		
13-Mar-18   01:05	To melanie.deschutes@gmail.com & 0 others	
12-Mar-18   01:05	To melanie.deschutes@gmail.com & 0 others	
11-Mar-18   00:05	To melanie.deschutes@gmail.com & 0 others	
10-Mar-18	To melanie.deschutes@gmail.com &	

The report is downloaded to your local machine.

# Working with Templates

Looking for a way to save even more time with DocuSign? Try creating a template.

Templates are perfect for almost any DocuSign workflow that you do over and over again.

Leveraging the documents and recipient information in your template makes the sending process a snap!

So what are some ways to use templates?

- **Same document, different recipients:** You have a disclosure form that you send to every potential client.
- **Same recipients, different document:** Every month, you send a report to your Board of Directors for their approval.

## CONTENTS

[Introduction to Templates \(video\)](#)

[Template basics](#)

[Create or copy a template](#)

[Share a template](#)

[Use a template](#)

[Edit a template](#)

[Organize templates with folders](#)

[Upload or download a template](#)

[Set template matching behavior for a template](#)

[Check account settings for template matching](#)

**Note:** Your access to templates is controlled by your user permissions, as defined by your DocuSign administrator. If you cannot create or edit, or even use templates, check with your administrator.

## Introduction to Templates Video

Here's a two minute video on templates to get you started:

[Click here to watch video](#)

## Template Basics

Templates help streamline the sending process when you frequently send the same or similar documents, or send documents to the same group of people. Templates allow you to create a standard document with any of the [supported file types](#), with set recipients and recipient roles, and signing fields. A template can include multiple files and can be sent to one or more recipients, using a signing order or not, as desired. Templates can also contain the signing instructions for the document.

Templates are flexible. You can use a template as is, without making any changes, or you can use a template as a starting point for your document. You can make changes to all aspects of a template, customizing your document however you like.

### **EXAMPLE – NDA Template**

Your technology start up regularly meets with potential partners. For each of

these meetings, you require a Non Disclosure Agreement (NDA) to protect your nascent business ideas and intellectual property. You create a template and upload your NDA file. You define a recipient role of "Technology Partner" and set signing fields for the role's signature, title, company name, and date signed. You define a message for your Document with the subject "NDA - Please Sign" and some appropriate text in the message field, asking for the signed document prior to your upcoming meeting.

When you schedule a meeting that requires an NDA, you create a document using your template, entering the actual contact information for the Technology Partner role that you defined.

## The Difference Between Templates and Documents

Creating a template is as easy as setting up a document. The key difference is that a document is a one-time transaction and a template is a blueprint for repeatable transactions. With templates, you can add named persons, just as you do when creating a regular document. But you can also define *placeholder roles*, that is, not an actual person but rather a role that would regularly participate in a transaction using the template. Typically, with templates you assign roles rather than named persons, as it's likely your recipients and signers will change every time you use the template.

The NDA template example illustrates a situation where you would set a placeholder role for your template recipient, rather than a named person.

## Create Templates

Creating a template is a lot like starting an envelope. You add files, recipients, messages, and signing fields, and you can add any of the standard [supported file types](#) to your template.

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[About templates](#)

[Create a template](#)

[Copy a template](#)

[Related topics](#)

**Note:** Your access to templates is controlled by your user permissions, as defined by your DocuSign administrator. If you cannot create or edit, or even use templates, check with your administrator.

## About templates

The key difference between creating envelopes and templates is that with templates you can add *placeholder roles* to your recipients list. The placeholder role represents a recipient in the envelopes created when you use the template. When you later start an envelope using your template, you fill in the actual person's information for that role. Typically, you use placeholder roles for the recipients rather than named persons, as you likely will send the template to different people every time you use it.

You can create a template from scratch, or you can copy an existing template and make changes to it. You can also use the [Save as Template](#) feature to make a template out of any of your existing envelopes. You can save a template with as little or as much information as you like. You can save it with just a title or just a document, or any other level of completeness.

## Create complete templates for maximum productivity

If your template is complete, you can save even more time. For a template to be complete, it must contain at least one of each of the following items: file, recipient, and recipient field. When you use a complete template, you have the option to simply fill in your recipient names and add the email message; if your account uses envelope custom fields, you can also enter the field values.

## Limit the changes senders can make when they use your template

There are several ways you can restrict the changes that can be made when a template is used to send an envelope. These restrictions are useful if you want to control how your template is used. For more information on how to limit changes to the recipients, messages, brand, and fields, see [Limit Changes to Templates and Template Fields](#).

## To create a template

You can save a template at any level of completeness. This procedure addresses all the things you can add or set for your template, but all steps are optional and you can choose exactly how you want to set up your template.

1. From the Templates page, click **New Template**.

The prepare view appears where you can add files, recipient roles, and messaging.

The screenshot shows the 'Prepare' view in DocuSign. At the top, there is a navigation bar with a back arrow, the text 'Untitled Dec 6, 2016', 'HELP', 'OTHER ACTIONS' with a dropdown arrow, and a yellow 'NEXT' button with a right arrow. Below this is the 'Template Name and Description' section, which contains a text input field with 'Untitled Dec 6, 2016' and a larger text area for 'Template Description (optional)'. The next section is 'Add Documents', featuring a document icon with a plus sign, a blue 'UPLOAD' button, and a 'GET FROM CLOUD' button with a dropdown arrow. The 'Add Recipients' section includes a note: 'As the sender, you automatically receive a copy of the completed documents.' To the right are three options: 'IMPORT BULK LIST' with a hamburger menu icon, 'ADD FROM CONTACTS' with a person icon, and 'SIGNING ORDER' with a list icon. Below these is a checkbox for 'Set signing order'. A recipient form contains three input fields for 'Role', 'Name', and 'Email'. To the right of these fields are two dropdown menus: 'NEEDS TO SIGN' with a pencil icon and 'MORE'. At the bottom left is a button with a plus and person icon labeled 'ADD RECIPIENT'.

2. Enter a name and description for your template.

These entries are visible only on the template itself and are not seen by signers of any envelopes generated from the template.

3. To upload one or more files to the template from your local machine or from one of your authorized cloud storage providers, follow the regular procedure described in [Add Files](#).

4. To add recipient roles, do the following:

- a. Define the role for the recipient in the Role field. The role helps template users understand whom to enter as the recipient, when they use the template to send a document. Example: Applicant

**Note:** Enter a unique Role to represent each individual who must sign your document. Example: Applicant 1; Applicant 2. You can use the signing order option if you need to route the envelope to the same role more than once.

- b. Select the signing action for the placeholder role. Example: Needs to Sign
  - c. To add additional recipient roles, click **ADD RECIPIENT** and repeat steps a-b.
5. To add named recipients, do the following:
    - a. Enter the person's email address and name.
    - b. Select the signing action for the recipient.
    - c. (Optional) Enter a role for the recipient. The role entry is optional and is useful to define why the person is signing the document. Example: Sales Approval
    - d. To add additional named recipients, click **ADD RECIPIENT** and repeat steps a-c.
  6. To set a routing order for your document or add an authentication method, follow the regular procedure described in [Add Recipients](#).

7. To define a standard message for your template, or to add private messages for individual recipients, follow the regular procedure described in [Add Messages](#).
8. To set advanced options, such as reminder and expiration schedules, or to add a password to protect your template from being modified, click the **Edit** link next to the Advanced Options details. See [Set Advanced Options](#) for more information.
9. To save your template without adding fields, click **Other Actions** and select **SAVE AND CLOSE**.
10. To set the signing fields for your document, click **NEXT**.
11. To add signing fields for each of your template recipients, follow the regular procedure described in [Add Fields to Documents](#).
12. To finish your template, click **SAVE AND CLOSE**.  
Your template is saved and ready to use.

## To copy a template

1. Navigate to the **Templates** page.  
The Template list appears, showing your saved templates.
2. Locate the template you wish to copy by searching, filtering, or simply scanning the Template list.
3. Click the template actions menu and select **Create a Copy**.  
The new template copy opens for you to change any aspect, including the template name, and the files, recipients, and recipient fields.
4. When you are finished making changes, click **SAVE AND CLOSE**.

## Related topics

- [Add merge fields to a template](#)
- [Use a template](#)
- [Edit a template](#)
- [Learn about template passwords](#)
- [Use a bulk send list with a template](#)

## How to Customize Envelope Titles with Recipient's Name or Email

When you use a template to send envelopes, if you use the default message subject as is, the envelopes will all be titled the same, making it hard to identify a particular one. This can be especially problematic if you are using the bulk send feature to send the same documents to many different people at once.

To customize the envelope titles for each document sent from a template, use the recipient role and merge fields to automatically insert the recipient's name or email address into the message subject. The message subject becomes both the email notification message subject and the name of the envelope as shown in your account. This is a good solution for a template with a single recipient.

### CONTENTS

[How to add merge fields to a template message subject](#)

[How to create a template with a bulk list recipient and merge fields](#)

## Adding individual recipients in addition to a bulk list

### Related topics

## To add merge fields to a template message subject

1. Create a new template and add your files as usual.
2. Add one or more recipients, completing the **Role** field. You can also enter a name and email address for the recipient but it is not required.

### Add Recipients

As the sender, you automatically receive a copy of the completed documents. ≡ IMPORT BULK LIST

Set signing order

 NEEDS TO SIGN ▼ MORE ▼



3. For the Message to All Recipients, click the **merge field icon** at the end of the subject field. The drop-down list contains options to insert the Name and Email Address for each recipient on the template.

**Message to All Recipients**

Custom email and language for each recipient

Please DocuSign: Credit Application

Enter Message

Insert Applicant's Name

Insert Applicant's Email Address

4. Select which merge fields to include in the message subject.
5. Add fields for your recipient as usual, and save and close the template.
6. When you use the template to start a new envelope, the message subject and envelope title include the recipient information you specified.

**Example** – Inserting recipient's name:

Subject	Status	Last change
<input type="checkbox"/> Please DocuSign: 2017 Conference Registration.docx Abby Angle To: Abby Angle, Mike Marsh	Waiting for Others	8/22/2017 10:49:05 am

## To create a template with a bulk list recipient and merge fields

If you use a bulk list recipient on a template, you can customize each envelope generated to include the recipient's name or email address in the title. By adding the merge fields to

the message subject, you avoid creating multiple envelopes with identical titles and you can easily distinguish one transaction from one another.

A template can include one bulk list recipient. Adding merge fields for a template with a bulk list recipient is recommended to customize the envelopes generated from the template. Also, if you want to include authentication for bulk list recipients, do so in the [bulk recipient list CSV file](#) using the Identification and PhoneNumber columns; do not add authentication separately in the Recipients section.

1. Create a new template and add your documents as usual.
2. In the Add Recipients section, click **IMPORT BULK LIST**.
3. Select a prepared bulk list and finish the import.

**TIP:** If you do not have a prepared bulk recipient list, you can upload a sample list configured with the appropriate columns and a sample recipient. When you use the template, you can replace the sample list with a list containing the actual recipients and column data you want to use.

4. Fill in the **Role** field.

**Example** – Bulk list with one sample recipient and Role = "Applicant":

**Add Recipients**

As the sender, you automatically receive a copy of the completed documents.

Set signing order

Applicant

[Bulk List \(1 recipients\)](#)

5. For the Message to All Recipients, click the **merge field icon** at the end of the subject field. The drop-down list contains options to insert the Name and Email Address for each recipient on the template.

**Message to All Recipients**

Custom email and language for each recipient

Please DocuSign: Credit Application 

Enter Message

Insert Applicant's Name

Insert Applicant's Email Address

6. Select which merge fields to include in the message subject.
7. Add fields for your bulk list recipient as usual, and save and close the template.
8. When you use the template to start a new envelope, you can replace or edit the bulk list.

## Adding individual recipients in addition to a bulk list

You can add individual recipients in addition to the list, but be aware that individual recipients will receive a separate copy of the envelope for each bulk list recipient. So if your bulk list contains 20 recipients and you add an individual recipient as shown below, the individual (Melanie E. Deschutes) is added to each envelope sent to bulk list recipients. Melanie will receive 20 separate envelopes to view and sign. Each bulk list recipient will receive their own envelope to view and sign.

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

Set signing order

**ADD FROM CONTACTS**   **SIGNING ORDER**

**MORE ▾**

⋮ Bulk List (20 recipients)

**NEEDS TO SIGN ▾** **MORE ▾**

⋮ melanie.deschutes@gmail.com

## Related topics

For more information on topics related to this help guide, see the following:

- [Create Templates](#). How to create templates.
- [Use Templates](#). How to use a template to start a new envelope.
- [Using Bulk Send](#). Overview of the bulk send feature.
- [Send Documents Using Bulk Send](#). Add a bulk list recipient to an envelope.

## Add, Change, or Remove a Template Password

Template passwords protect against editing. You can set a password on any template you create. If the [template is shared with other users](#) who have the necessary permissions to edit the shared template (template create or share), they must first provide the password. In this way, you can share templates and not worry about them being modified. If you want to allow another user to modify your template, you can provide them with the password.

**Note:** Account administrators do not need to provide passwords on protected templates. They can edit any template created within the account.

The password is not visible. If you forget the password you added to a template, you can easily reset the template to remove the password or enter a new one.

If you edit a template shared with you, you cannot modify or add a template password. Only the template creator can set or modify the password.

When you download a template, the password is removed from the downloaded copy. You can provide the downloaded template to others without having to provide password details.

### To add a password to a template

1. Start by creating a new template (as described in [Create Templates](#)) or editing an existing template (as described in [Edit Templates](#)).
2. In the Template prepare view, in the Advanced Options section, click the **Edit** link.

**Message to All Recipients**

Please DocuSign: LeadPaintDisclosure.pdf

Enter Message

**Advanced Options | Edit**

- Documents will expire 30 days after send date
- Recipients will be warned 2 day(s) before request expires

3. In the Advanced Options dialog, under the **Password** section, enter a password, and then re-enter to verify the password.

Template passwords are limited to 15 characters.

4. Click **SAVE**.

Your password is added to the template.

5. Finish creating or editing your template, and then save and close it.

## To change or remove a template password

1. Start by editing your template (as described in [Edit Templates](#)).
2. In the Template prepare view, in the Advanced Options section, click the **Edit** link.
3. In the Password section, click **Reset**.

A screenshot of a web form titled "Password". Below the title is a label "Password" and a text input field containing ten dots. Below the input field is a blue "Reset" button, which is circled in green.

The empty password fields appear.

4. Do one of the following:
  - To enter a new password, fill in the password fields.
  - To remove the password, leave the fields blank.
5. Click **SAVE**.
6. Save and close the template.

## Limit Changes to Templates and Template Fields

For the templates you create, you can limit the changes that can be made when a template is used to send an envelope. These restrictions are useful if you want to control how your template is used. This guide describes the options and steps for restricting changes to your template regarding general template settings, recipient details and settings, and template fields.

**Note:** If you [share a template](#) with other account users, they may be able to edit your template, including changing modification or permission property settings. You can protect your shared template from being modified by other users by [setting a password](#). Then, if

the template is shared with other users, in order for them to edit the shared template, they must provide the password.

## CONTENTS

[Template modification settings](#)

[Recipient modification settings](#)

[Sender permission field properties](#)

## Template modification settings

Through the template advanced options settings, you can limit changes across your template, generally. These settings, and their effects when the template is used or applied to a document, are as follows:

- **Don't allow sender to edit, add, or remove recipients**

Completed recipient information cannot be edited, and recipients cannot be deleted or added to the envelope. If there is any missing recipient information, such as when only the role is provided and the name and email address are still needed to send the envelope, or a phone number for phone authentication is left blank, the sender can complete all remaining fields.

- **Don't allow senders to edit the subject, email, or private messages**

Protects the email message sent to all recipients, and any private messages entered for individual recipients. Anything you enter into these areas on the template are carried over to all documents created from the template. If you leave any of these areas blank, they will remain so in any template documents.

- **Don't allow senders to edit the brand**

Protects the brand setting you select for your template. Any envelopes sent from the template will use the specified brand for email notifications and the signing experience.

## To specify template modification settings

1. From the template prepare view (either on a new template you create or when editing an existing template), select the **Edit** link next to the Advanced Options section.

**Message to All Recipients**

Please DocuSign: LeadPaintDisclosure.pdf

Enter Message

**Advanced Options** | **Edit**

- Documents will expire 30 days after send date
- Recipients will be warned 2 day(s) before request expires

2. Select the check boxes for the specific restrictions you want to apply to the template:
  - Don't allow sender to edit, add, or remove recipients
  - Don't allow senders to edit the subject, email, or private messages
  - Don't allow senders to edit the brand
3. Click **Save**.
4. Click **Other Actions** and select **Save and Close**.

## Recipient modification settings

Through the recipient advanced options, you can limit the changes that senders can make to individual recipients on your template. The settings and their effects when the template is used or applied to a document are as follows:

- **Don't allow senders to edit recipient**

Completed recipient information for the selected recipient cannot be modified. If there is any missing recipient information, such as when only the role is provided and the name and email address are still needed to send the envelope, the sender can complete all remaining fields.

- **Don't allow senders to delete recipient**

The selected recipient cannot be removed. This setting ensures the recipient is included on all envelopes sent from the template.

## To specify recipient modification settings

1. From the template prepare view (either on a new template you create or when editing an existing template), on a recipient row, click **More** and select **Advanced settings**.

**Add Recipients**

As the sender, you automatically receive a copy of the completed documents.

≡ IMPORT BULK LIST    👤 ADD FROM CONTACTS  
📄 SIGNING ORDER

Set signing order

Applicant  
Name  
Email

+ ADD RECIPIENT

NEEDS TO SIGN ▼ MORE ▼

- 🔑 Add access authentication
- 💬 Add private message
- ⚙️ Advanced settings

2. In the Advanced Settings panel, select the check boxes for the modification settings you want to apply to the recipient:
  - Don't allow senders to edit recipient
  - Don't allow senders to delete recipient
3. Click **Done**.

The advanced settings panel collapses and shows that settings are selected.

## Sender permission field properties

You can protect the fields you add to your template from being changed or deleted. When the template is used, depending on which permission properties you set, the sender cannot change or delete protected fields. The sender permission property settings are as follows:

- **Restrict changes**

This setting guarantees the field will be present on all envelopes created with the template, exactly as it was set up on the template. For all field types, the sender cannot

delete the field or change the recipient, or modify the placement, size, data label, conditional logic, or any other field property setting.

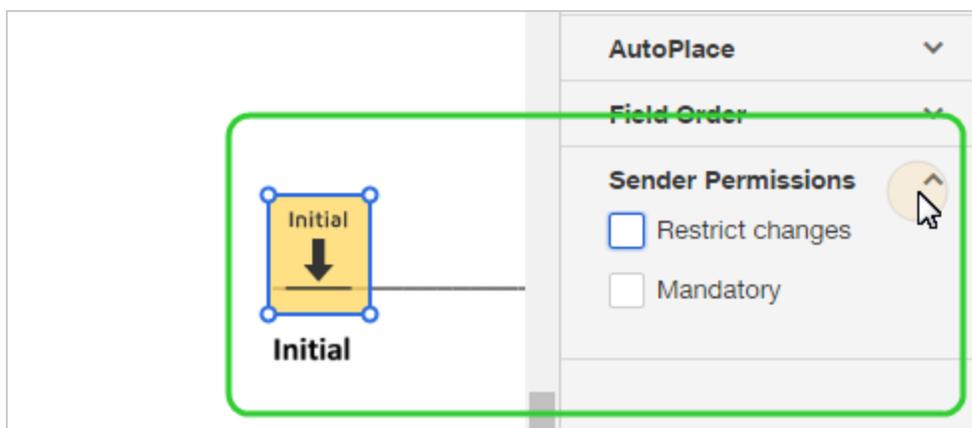
For text, checkbox, and radio button fields, the sender can enter text and make selections. For note fields, the sender can enter the note text. However, since the note field size is fixed, only the text that fits into the field is included and visible to the recipient.

- **Mandatory**

This setting guarantees the field will be present on all envelopes created with the template. The sender cannot delete a mandatory field. They can, however, make other changes to the field, such as moving, resizing, or setting any other field properties.

### To specify sender permission settings for a field

1. From the template add fields view (either on a new template you create or when editing an existing template), place the field onto the document.
2. In the properties panel on the right, expand the **Sender Permissions** section:



3. Select the permission settings you want to enforce when senders use the template:
  - **Restrict changes** - sender cannot change any field properties or delete the field
  - **Mandatory** - sender cannot delete the field
4. Save and close the template.

## Edit Templates

You can edit any template that you previously created and saved. If you have access to templates shared with you by other users, you may be able to edit these as well.

When editing a template, if you decide you do not want to save your changes after all, you can discard the changes and leave the template in its original form.

**Note:** Your access to templates is controlled by your user permissions, as defined by your DocuSign administrator. If you cannot create or edit, or even use templates, check with your administrator.

### CONTENTS

[How to edit a template](#)

[How to cancel changes while editing](#)

[Template history](#)

[Template passwords](#)

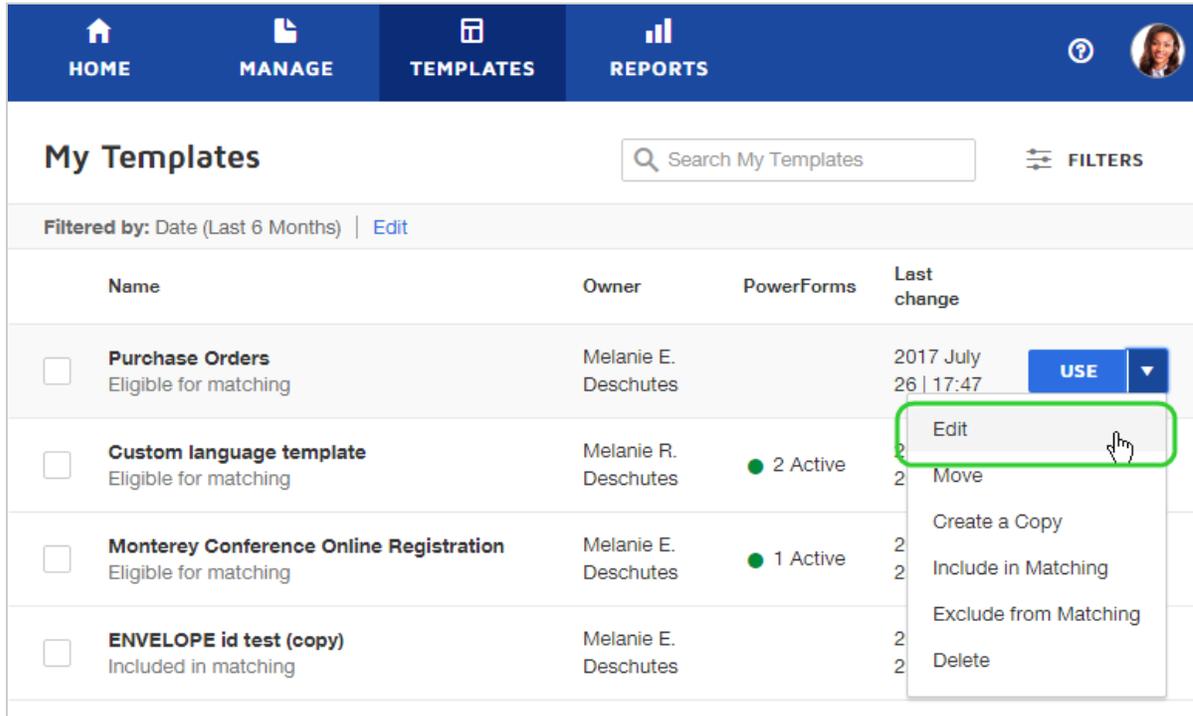
## To edit a template

1. Navigate to the **Templates** page.

The Template list appears, showing your saved templates.

2. Locate the template you wish to edit by searching, filtering, or simply scanning the Template list.
3. Click the template actions menu and select **Edit**.

If you do not see the Edit option, check with your DocuSign administrator regarding your user permissions for templates.



The screenshot displays the 'My Templates' interface. At the top, there is a navigation bar with 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. Below this, the 'My Templates' section includes a search bar and a 'FILTERS' button. The main content is a table of templates. The first row, 'Purchase Orders', has a dropdown menu open, with 'Edit' selected. The table columns are Name, Owner, PowerForms, and Last change.

Name	Owner	PowerForms	Last change
<input type="checkbox"/> <b>Purchase Orders</b> Eligible for matching	Melanie E. Deschutes		2017 July 26   17:47
<input type="checkbox"/> <b>Custom language template</b> Eligible for matching	Melanie R. Deschutes	● 2 Active	2
<input type="checkbox"/> <b>Monterey Conference Online Registration</b> Eligible for matching	Melanie E. Deschutes	● 1 Active	2
<input type="checkbox"/> <b>ENVELOPE id test (copy)</b> Included in matching	Melanie E. Deschutes		2

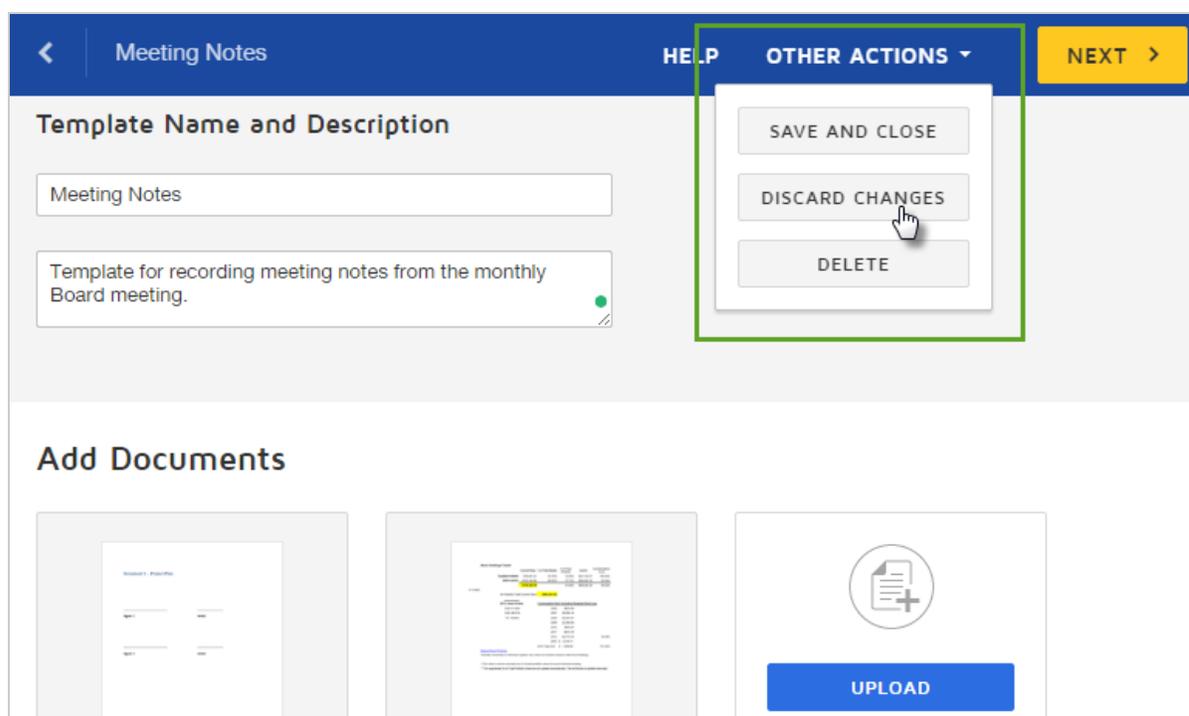
4. If the template is password protected and you are not the owner, enter the password in the Enter Password dialog and click **SUBMIT**.

The selected template opens in the Prepare Template view.

5. Edit the template. You can change any aspect of the template, including the template name, and the files, recipients, and recipient fields.

## To cancel changes while editing a template

1. At any point while editing your template, click **Other Actions** and select **Discard Changes**.



2. Click **Discard** to confirm your action.

Your changes are discarded and your template is restored to its original state.

## Template history

The template history records the template details, including the template ID, owner, list of documents, and more. The activity history lists the date and user for when the template was created and each time it was edited.

1. Navigate to the **Templates** page.
2. Locate the template you wish to edit by searching, filtering, or simply scanning the Template list.
3. Click the template title to select it and open the Template Details view.
4. Click the **MORE** menu and select **History**.

The screenshot shows the DocuSign interface with a blue navigation bar at the top containing 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The main content area displays the template title 'Monterey Conference Online Registration' with an information icon and a user icon. Below the title, it says 'Eligible for matching' and 'Online registration for 2017 investment conference.' There are five buttons: 'USE', 'EDIT', 'MOVE', 'SHARED (3)', and 'MORE'. A mouse cursor is pointing at the 'MORE' button. Below the buttons is a 'Recipients' section with a 'SIGNING ORDER' icon. The recipients list includes 'Attendee:' and 'Conference Manager: Mike Marsh' (mike.marsh@mailinator.com), both with a 'Needs to Sign' status and a pen icon.

## 5. The Template History displays in a window.

### Template History

---

#### Template Details

<b>Subject</b>	Please DocuSign: 2017 Conference Registration.docx [[Attendee_UserName]]
<b>Template ID</b>	6f2b1eef-c4f9-4b73-add6-5412bb6b4d88
<b>Owner</b>	Melanie E. Deschutes
<b>Location</b>	Online
<b>Documents</b>	Conference Registration.docx
<b>Recipients</b>	Attendee, Mike Marsh
<b>Time Zone</b>	My computer's time zone

---

#### Activity History

Time	User	Action
5/15/2017   09:54:10 am	Melanie E. Deschutes (English (US)) [api:10.101.101.11]	Created
5/15/2017   09:56:26 am	Melanie E. Deschutes (English (US)) [api:10.101.101.11]	Edited
5/16/2017   01:58:14 pm	Mike L. Marsh (English (US)) [api:10.101.101.11]	Edited
7/25/2017   04:23:14 pm	Melanie E. Deschutes (English (US)) [api:10.101.101.11]	Edited

## Template passwords

If the templates that are shared with you have a password applied, you will need the password in order to edit the template. Passwords are set by the template creator. [Learn more...](#)

If you are an account administrator, you do not need to provide a password to modify the templates created by your account users.

## Share Templates

Sharing a template allows other users and user groups on your account to access and use it to send documents for signature. As long as you have template *share* permission on your DocuSign account, you can share any template you created, and you can modify sharing settings for any template shared with you.

**IMPORTANT:** Your template permissions are set by your DocuSign administrator. You must have template permission set to *share* in order to share templates. For more information on setting user permissions see [Permission Sets](#).

### Two ways to share templates

There are two ways you can share your templates:

- Share a template directly with select users and groups.
- Share a template by adding it to a shared template folder.

#### CONTENTS

[Protect your shared templates](#)

[Share a template directly](#)

[Create a shared template folder](#)

[Share a template by adding it to a shared template folder](#)

[Remove a template from a shared folder](#)

[Related topics](#)

All template sharing information and settings are available from the Template Details view.

## Protect your shared templates

When you share a template, you grant the selected users or groups the right to edit the template, provided the users have the necessary permissions (template create or share). To protect a shared template, you can set a password or lock parts of the template.

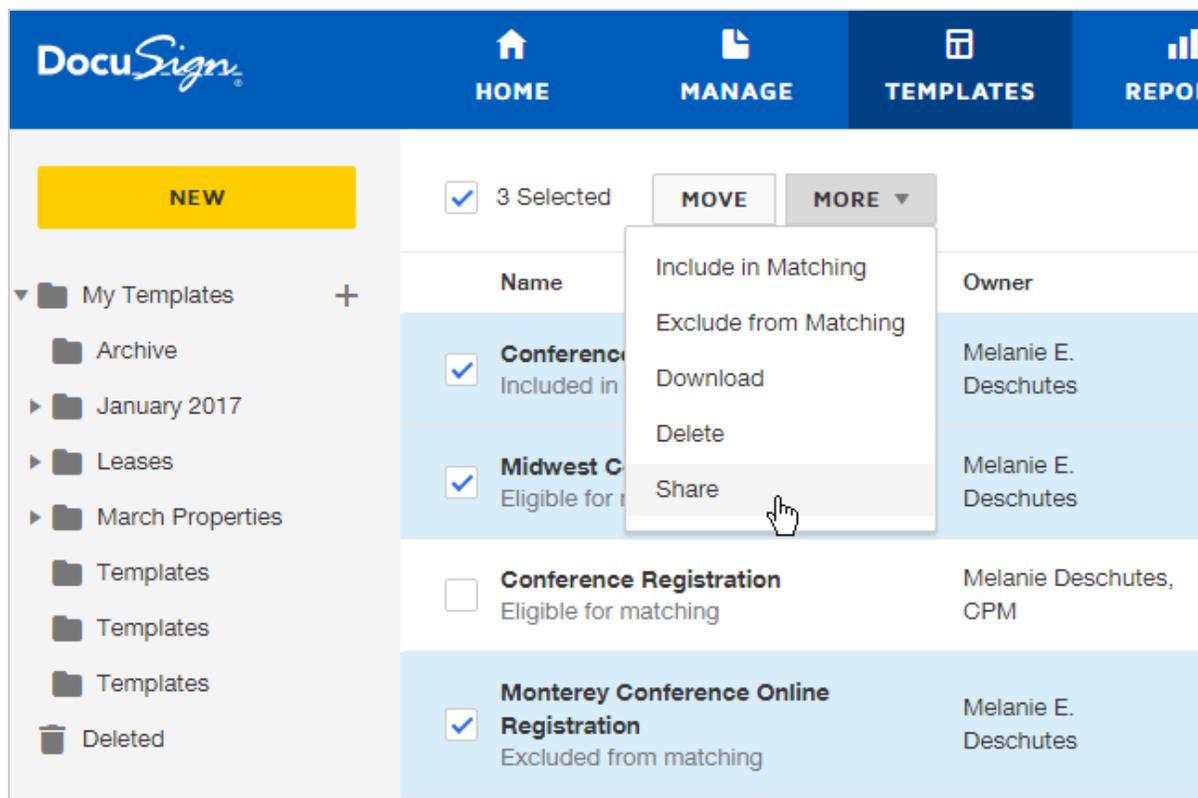
- **Set a password.** You can protect your shared template from being modified by other users by [setting a password](#). Then, if the template is shared with other users, in order for them to edit the shared template, they must provide the password.

Administrators on your account can access all templates created within the account and can edit them and modify sharing settings, regardless of the password setting. They cannot delete templates created by other users. (Only the template creator can delete a template.)

- **Lock template elements.** You can also apply settings to [limit the types of changes](#) that can be made when the template is used to send an envelope. You can control how the template is used by locking recipient information, the email message to all recipients and private messages to individual recipients, and the brand.

## To share a template directly

1. Navigate to the Templates page.
2. Locate the template you wish to share by searching, filtering, or simply scanning the Template list.
3. Mark the check box for the template to select it. You can select multiple templates to share at once.
4. Click **MORE** and select **Share**.

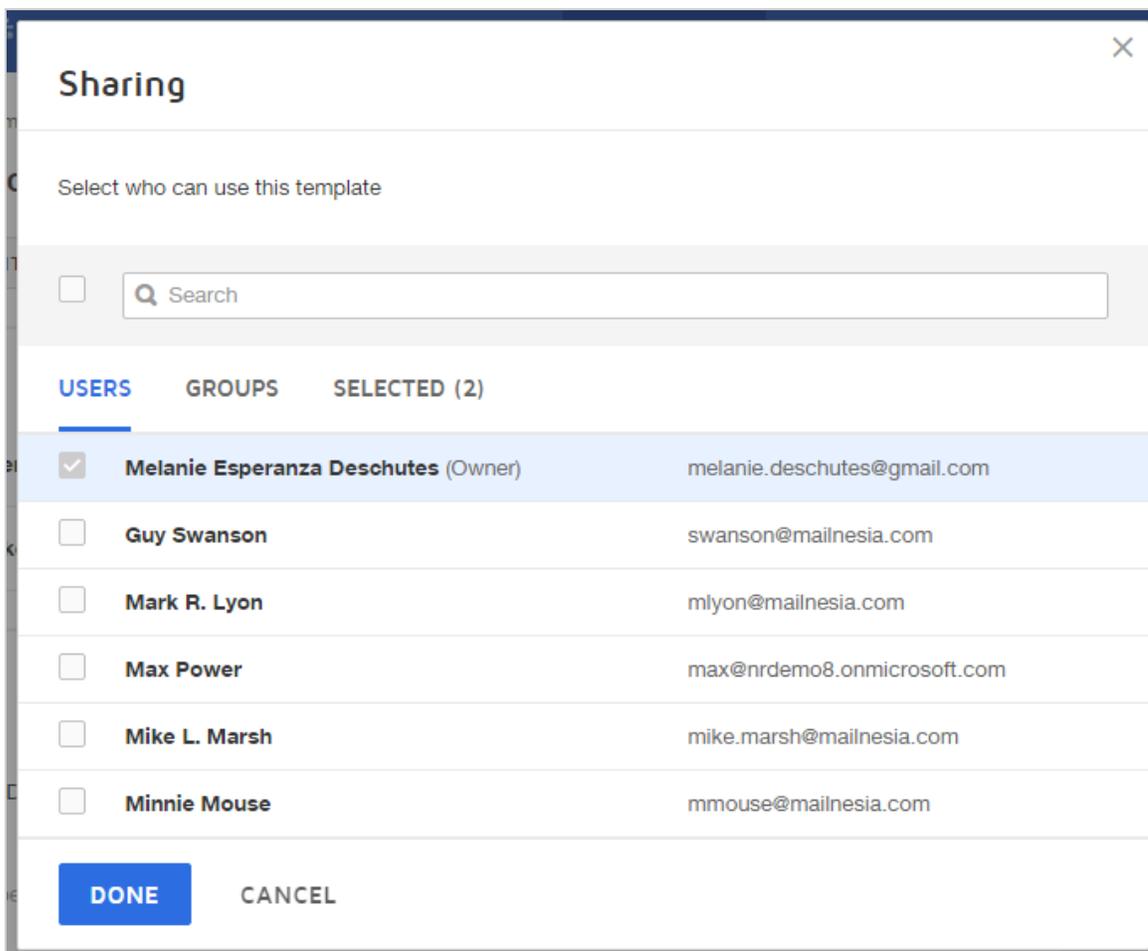


The Sharing dialog opens for you to select the users and groups to share your template with.

5. Make your user and group sharing selections - the Search function returns results for the selected tab:
  - **Users** - lists all users on your account.
  - **Groups** - lists all groups defined for your account. Groups are listed by name only; group members are not displayed. The list includes standard account groups of Administrators and Everyone. By default, all templates are shared with the Administrators group and this cannot be changed. In addition to the standard groups, your DocuSign administrator can define customized groups of account users and can provide further details. [Learn more...](#)

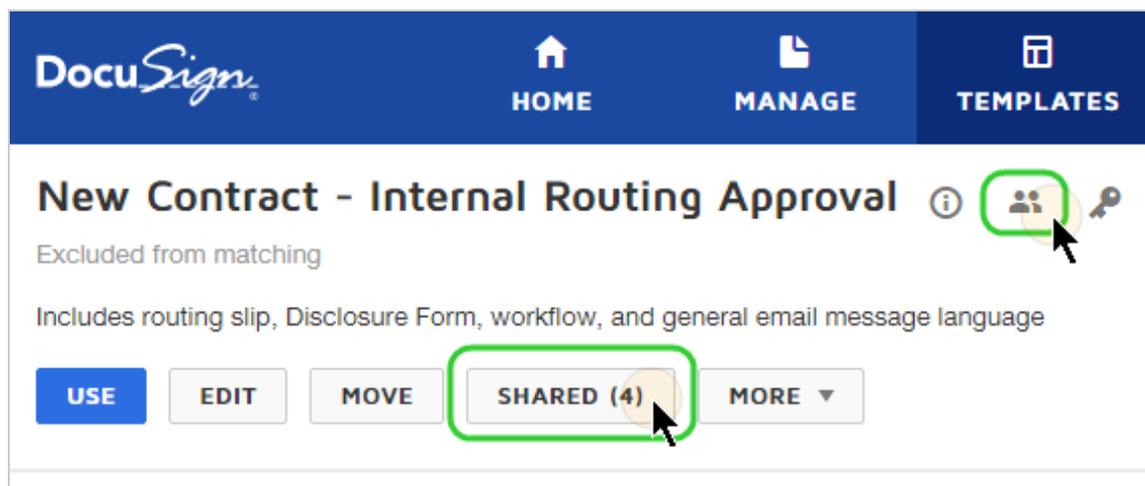
**TIP:** To easily share your template with everyone in your account, on the **Groups** tab, select **Everyone**.

- **Selected** - all users and groups that are selected for sharing. Use this tab to verify your selections and make any necessary changes.



6. Click **Done**.

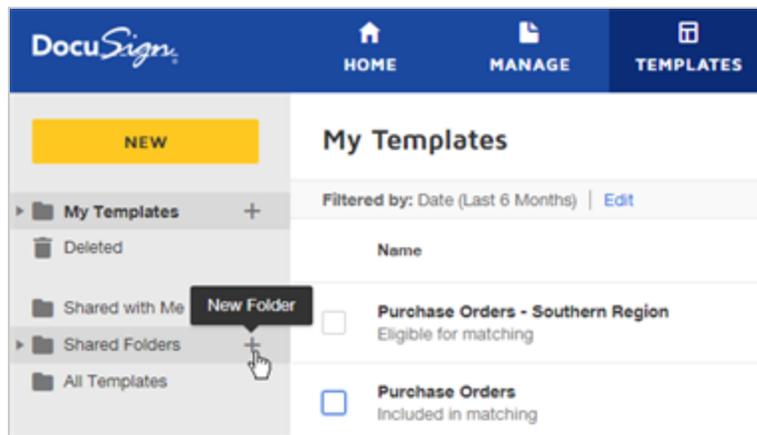
The Template Details view updates to indicate the template is now shared. You can always check to see whom it is shared with and make changes to the sharing selections.



For the people you have shared the template with, it appears in their **Shared with Me** folder on their Templates page.

### To create a shared template folder

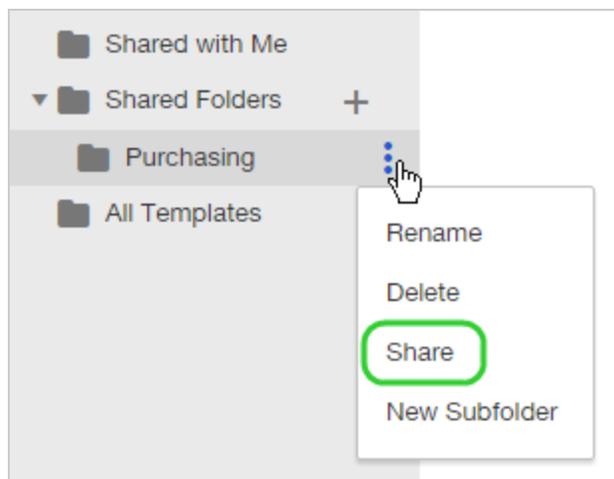
1. Navigate to the Templates page.
2. Click the **New Folder icon** next to Shared Folders.



3. Enter a name for your shared template folder and click **Save**.

When you share the folder, the name you enter identifies the folder to the users with whom you share it.

4. Click the **menu icon** next to your new folder and select **Share**.



5. In the Sharing dialog, make your user and group sharing selections - the Search function returns results for the selected tab:

- **Users** - lists all users on your account.
- **Groups** - lists all groups defined for your account. Groups are listed by name only; group members are not displayed. The list includes standard account groups of Administrators and Everyone. By default, all templates are shared with the Administrators group and this cannot be changed. In addition to the standard groups, your DocuSign administrator can define customized groups of account users and can provide further details. [Learn more...](#)

**TIP:** To easily share your template with everyone in your account, on the Groups tab, select **Everyone**.

- **Selected** - all users and groups that are selected for sharing. Use this tab to verify your selections and make any necessary changes.

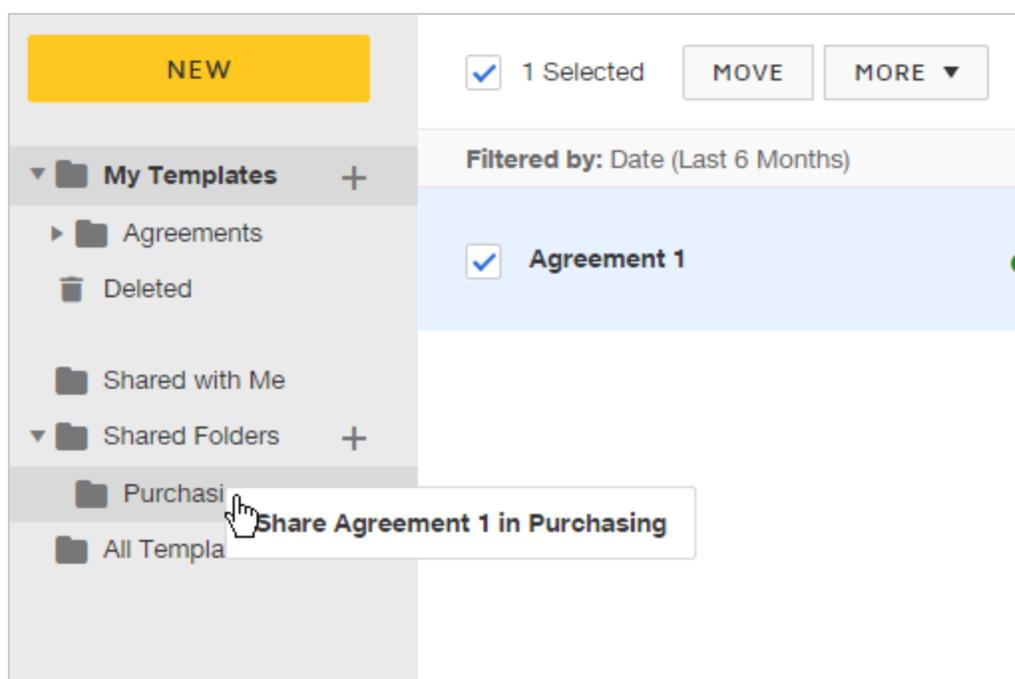
6. Click **Done**.

Your folder is now shared with the users and groups you selected, and these users can now see the folder listed under their Shared Folders section. Any templates you add to the new folder are shared automatically and accessible to everyone with access to the folder.

**IMPORTANT:** Anyone with access to the shared folder and who has template share permissions can also add and remove templates from the shared folder.

## To share a template by adding it to a shared template folder

1. Navigate to the Templates page.
2. Locate the template you wish to share by searching, filtering, or simply scanning the Template list, and mark the check box to select it. You can select multiple templates at once.
3. Click and hold on the template row and drag the template to the shared folder you want to add it to.



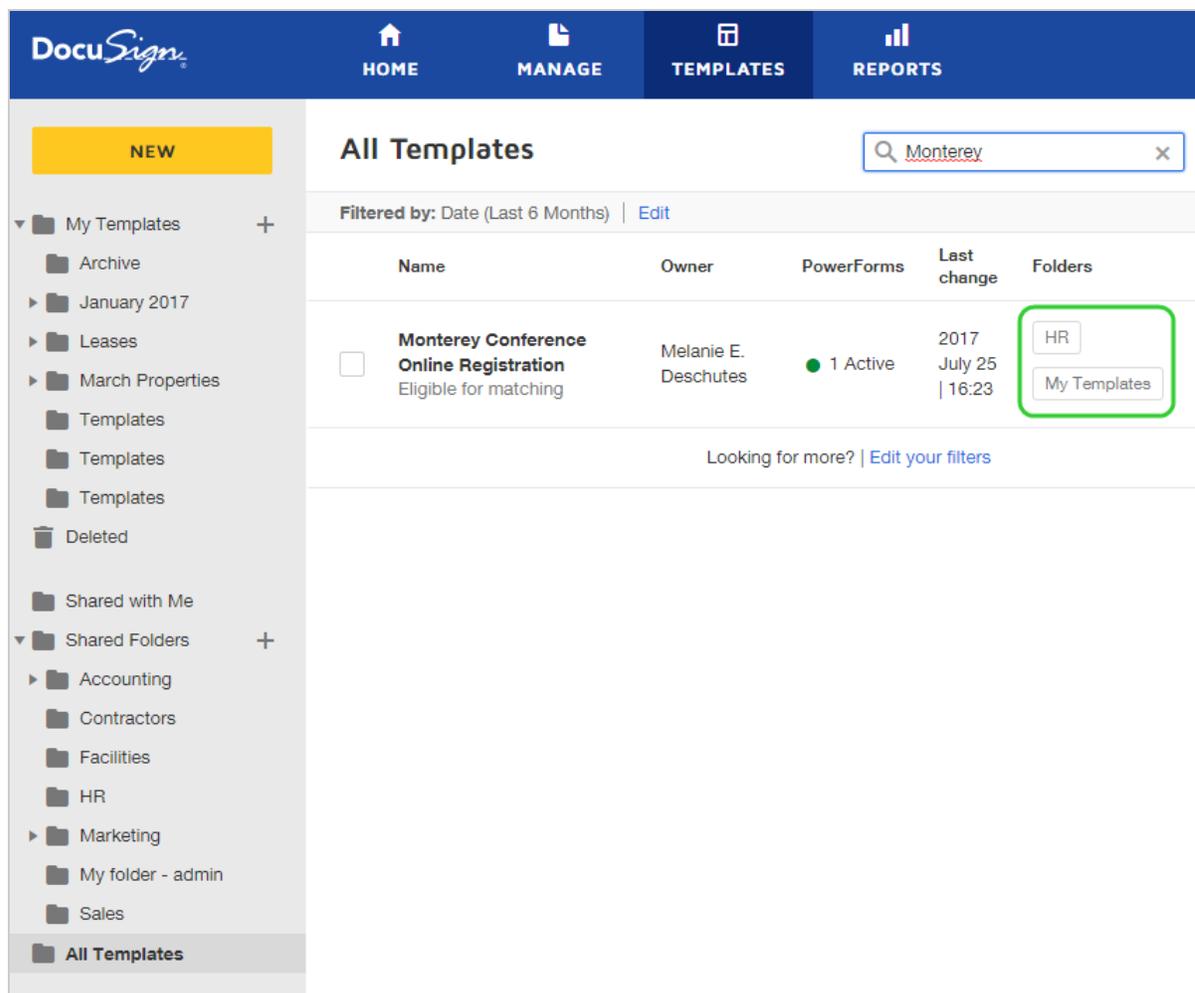
4. Release the mouse button to drop the templates into the folder.

The template is shared and accessible to anyone who you selected to share the template folder with.

## To remove a template from a shared template folder

Anyone with template *share* permission can remove a template from any of their shared template folders.

1. Navigate to the Templates page.
2. Locate the template you wish to remove from sharing by selecting the **All Templates** folder and searching for some portion of the template name.



The screenshot shows the DocuSign interface. The top navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The left sidebar shows a tree view of folders, with 'All Templates' selected at the bottom. The main content area is titled 'All Templates' and features a search bar with the text 'Monterey'. Below the search bar, it indicates 'Filtered by: Date (Last 6 Months) | Edit'. A table displays the search results:

Name	Owner	PowerForms	Last change	Folders
<input type="checkbox"/> <b>Monterey Conference Online Registration</b> Eligible for matching	Melanie E. Deschutes	● 1 Active	2017 July 25   16:23	HR My Templates

Below the table, there is a link: 'Looking for more? | Edit your filters'.

If you know which shared folder the template is in, you can just navigate there directly and skip to Step 4.

- The Folders column shows which folders the template is located in. Click the shared folder label to view the folder's contents. Example: From the above screenshot, click the "HR" label to open the HR shared template folder.

HR					Search Folder's Templates	FILTERS
Filtered by: Date (Last 6 Months)   <a href="#">Edit</a>						
Name	Owner	PowerForms	Last change			
<input type="checkbox"/> <b>Monterey Conference Online Registration</b> Eligible for matching	Melanie E. Deschutes	1 Active	2017 July 25   16:23	<a href="#">USE</a>		
<input type="checkbox"/> <b>ENVELOPE id test (copy)</b> Included in matching	Melanie E. Deschutes		2017 July 25   14:41	<a href="#">USE</a>		
Looking for more?   <a href="#">Edit your filters</a>						

- Select the check box for the templates you want to remove from the shared folder, and then click **REMOVE**.

1 Selected MORE				
Name	Owner	PowerForms	Last change	
<input type="checkbox"/> <b>Monterey Conference Online Registration</b> Eligible for matching	Melanie E. Deschutes		05-Feb-18 12:37	<a href="#">USE</a>
<input checked="" type="checkbox"/> <b>TE</b> Excluded from matching	Melanie E. Deschutes		26-Jul-17 18:01	<a href="#">USE</a>

The template is removed and no longer shared with the users have access to the shared folder.

## Related topics

- [Using shared templates](#). A guide on how to use templates that are shared with you.

## Use Templates

Templates help streamline the sending process when you frequently send the same or similar documents, or send documents to the same group of people. You can use your saved templates to start a new envelope. Everything defined in the saved template is applied and added to the new envelope. You can use the template as is, or you can add additional files, modify signing fields, add recipients, and add and modify messages.

### CONTENTS

[How to use a template to create an envelope](#)

[Complete templates](#)

[Add a template to an envelope](#)

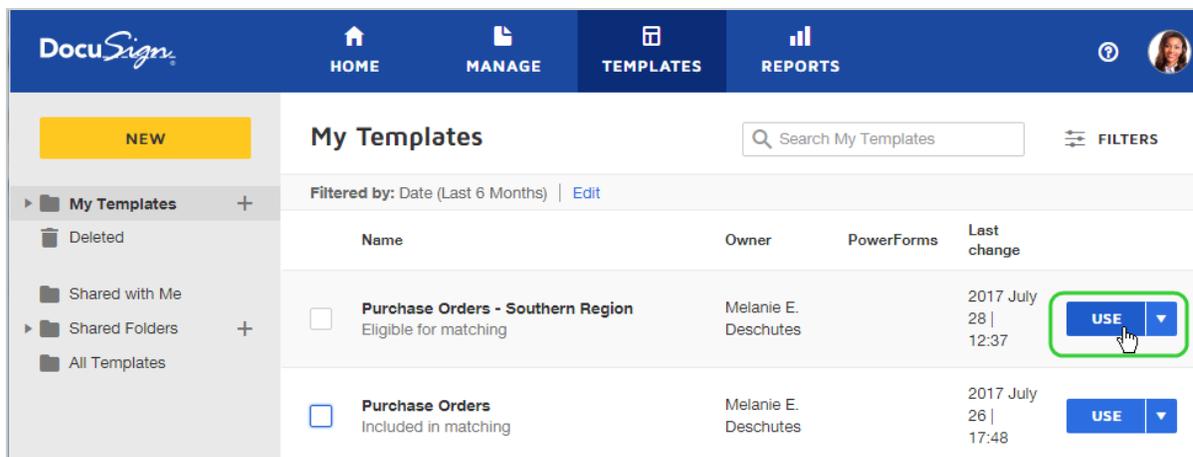
[Locked items on a template](#)

[Related topics](#)

**Note:** Your access to templates is controlled by your user permissions, as defined by your DocuSign administrator. If you cannot create or edit, or even use templates, check with your administrator.

## To use a template to create an envelope

1. Navigate to the Templates page.  
The Template list appears, showing your saved templates.
2. Locate the template you wish to use by searching, filtering, or simply scanning the Template list.
3. To use the template to start a new document, click **USE**.



The screenshot shows the DocuSign interface for the 'My Templates' page. The navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The 'TEMPLATES' tab is active. On the left, there is a sidebar with a 'NEW' button and a list of folders: 'My Templates', 'Deleted', 'Shared with Me', 'Shared Folders', and 'All Templates'. The main content area is titled 'My Templates' and includes a search bar and a 'FILTERS' button. Below this, there is a table of templates. The table has columns for 'Name', 'Owner', 'PowerForms', and 'Last change'. Two templates are listed:

Name	Owner	PowerForms	Last change
<input type="checkbox"/> <b>Purchase Orders - Southern Region</b> Eligible for matching	Melanie E. Deschutes		2017 July 28   12:37
<input type="checkbox"/> <b>Purchase Orders</b> Included in matching	Melanie E. Deschutes		2017 July 26   17:48

The 'USE' button for the first template is highlighted with a green box.

4. A new envelope opens with your template settings loaded. If your envelope is complete with at least one file, one recipient, and one field, then follow [To use a complete template](#).
5. For any recipient roles, enter the actual email and name values.

### Add Recipients

As the sender, you automatically receive a copy of the completed documents. ☰ IMPORT BULK LIST

Set signing order

Applicant	 NEEDS TO SIGN ▾	MORE ▾
Name		
Email		

6. Enter your Message to All Recipients subject and text. If your template includes a message subject and text, that information is added to your envelope. You can use the template message as is, or modify it.

**TIP:** If you send the same envelope over and over, enter a custom subject line. If you use the default subject as is, the envelopes will all be titled the same, making it hard to identify a particular one.

7. To review the recipient fields, click **NEXT**.
8. To send your envelope click **SEND**.

## Complete templates

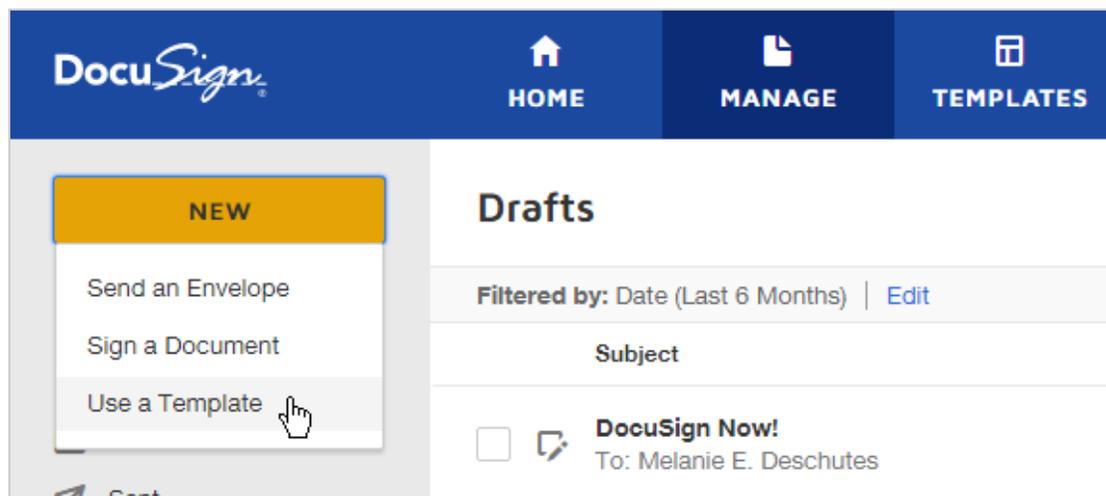
If your template is complete, you can save even more time. For a template to be complete, it must contain at least one of each of the following items: document, recipient, and recipient field. When you use a complete template, you have the option to simply fill in your recipient names and review the email message. If your account uses envelope custom fields, you can enter the field values.

**EXAMPLE — Complete Templates**

Your Facilities staff uses DocuSign to issue temporary badges to contractors working in your facility. You receive several contractors every month, so you have a template prepared with the temporary access and badge request files that contractors must sign. The template is complete, with the files, recipient role for the contractor, and the fields for the contractor to complete. When Facilities uses the template, they simply fill in the contractor's name and email, and send the envelope.

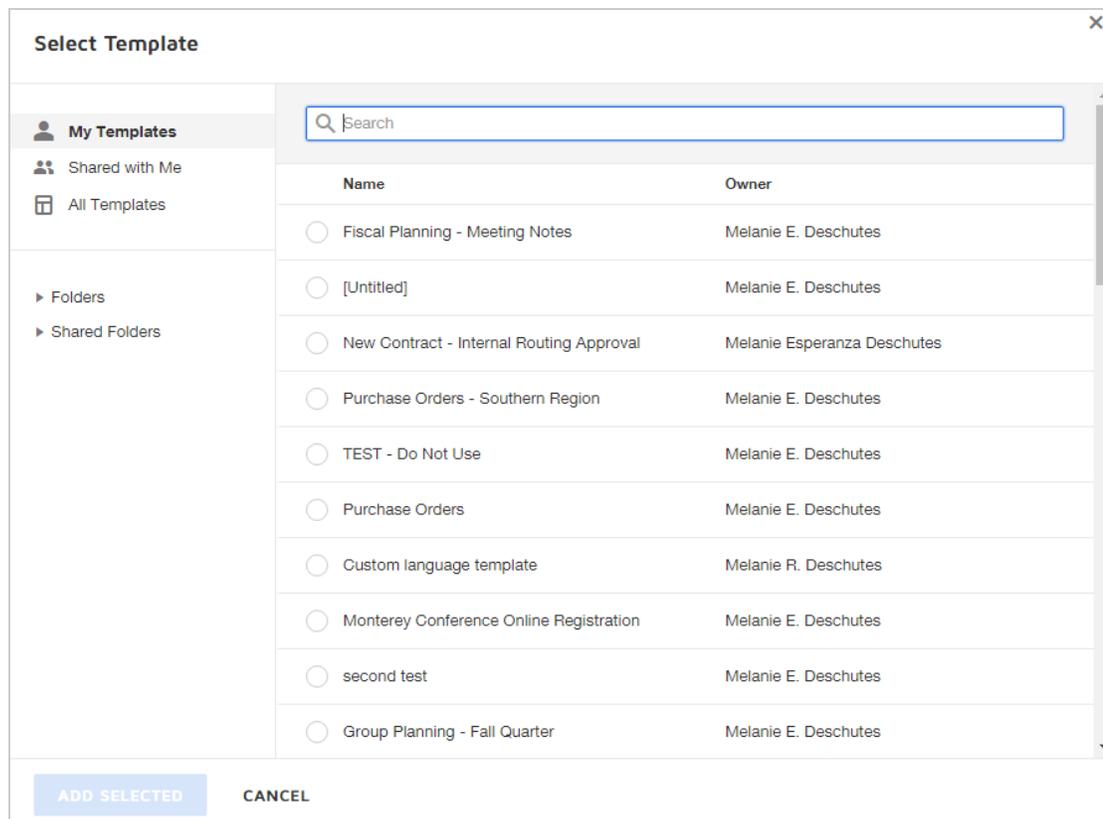
**To use a complete template**

1. Use one of the following methods to start an envelope from a complete template:
  - From the Manage page:
    - a. Click the **NEW** drop down and select **Use a Template**.



- b. In the Select Template dialog, select the template you want to use. Your templates

and the templates shared with you are available to search and select.



- From the Templates page: Locate the template you want to use for your new document and click **USE**.

**My Templates**  **FILTERS**

Filtered by: Date (Last 6 Months) | [Edit](#)

	Name	Owner	PowerForms	Last change	
<input type="checkbox"/>	<b>Fiscal Planning - Meeting Notes</b> Eligible for matching	Melanie E. Deschutes		8/2/2017 11:01:39 am	<b>USE</b> ▼
<input type="checkbox"/>	<b>[Untitled]</b> Eligible for matching	Melanie E. Deschutes		7/31/2017 12:12:11 pm	<b>USE</b> ▼

- 2. In the prepare view for your new envelope, complete the required fields:
  - a. Fill in the recipient information for any role recipients.
  - b. Review the Message Subject and text and adjust as desired.

- c. (Optional) Enter values for any envelope custom fields defined for your account.

### Purchase Orders

#### Recipients

1 **signer 1**  **NEEDS TO SIGN** **MORE** ▼

Name

Email ▼

#### Envelope Custom Fields

Code  Declined Reason  Quarterly Reports

#### Message to All Recipients

Custom email and language for each recipient

#### Advanced Options

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 29 days after send date
- Recipients are warned day(s) before request expires

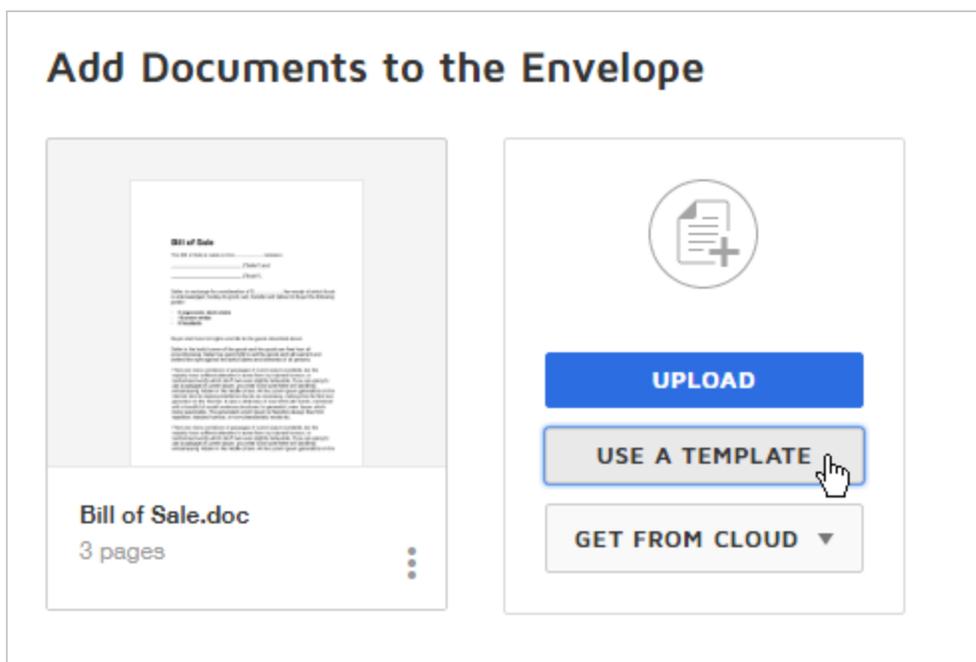
**SEND**   **ADVANCED EDIT**   **DISCARD**

3. To send your envelope as is, click **SEND**.
4. (Optional) To make additional changes, such as upload additional files, or add more recipients or recipient fields, click **ADVANCED EDIT** and complete and send your envelope.

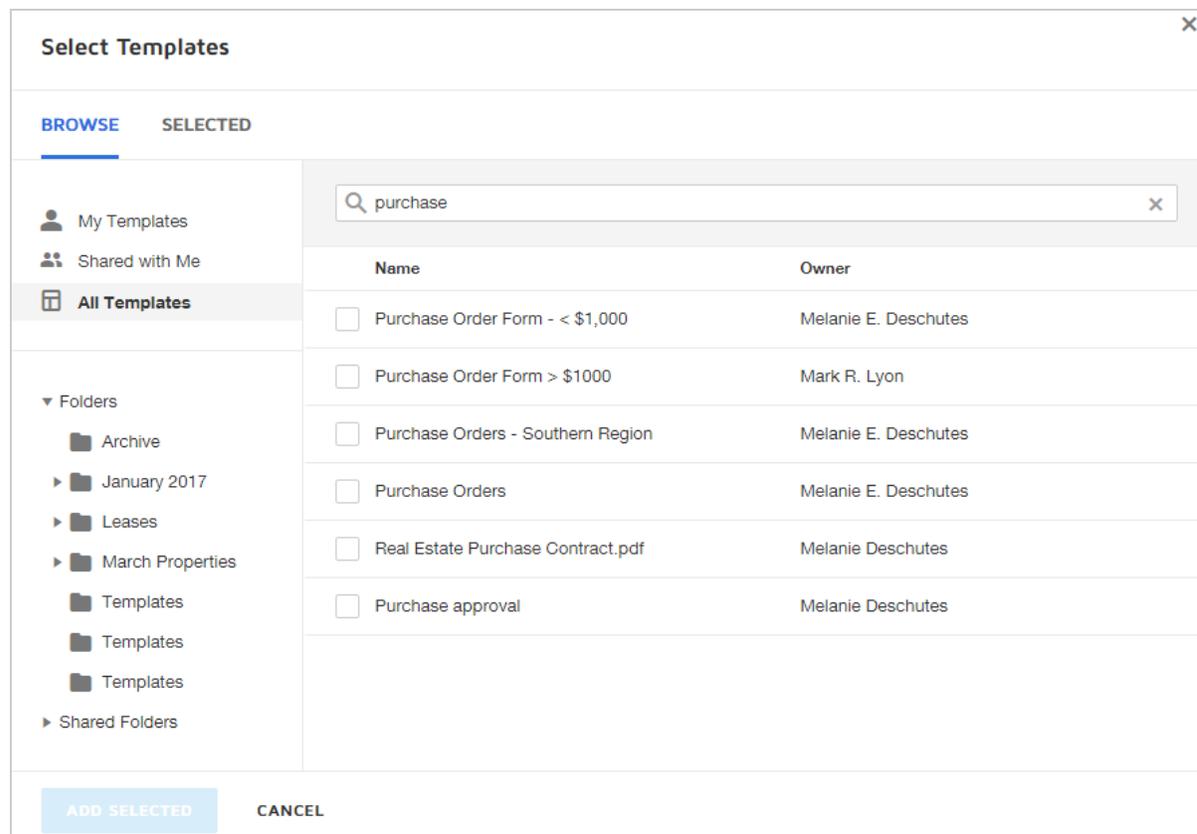
## Add a template to an envelope

If you start an envelope you can add one or more templates to the envelope. You can add other files, recipients, and fields to the envelope separate from the templates you add.

1. Start a new envelope from **NEW > Send an Envelope**.
2. From the prepare view, under Add Files, click **USE A TEMPLATE**.



3. In the Select Templates dialog, browse or search through the template collections at left and select one or more templates to use.



4. Click **ADD SELECTED**. The documents, recipients, messages, and recipient fields are added to your document.

## Locked items on a template

When you use a template, you might find that some aspects of the template are locked and cannot be edited. These areas include recipient information, the email message to all recipients and private messages to individual recipients, the brand, and individual fields. Fields or controls which are restricted in this way, will appear grayed out and you cannot change or use them.

The template owner (whom you can identify in the [Template ID](#) details) controls these settings, and can restrict modifications to various template settings, recipient information, and individual fields in order to ensure the template is used as designed.

## Related topics

- [Template Basics](#). Information about templates including a short introductory video.
- [Template permissions](#). Your user permission settings are controlled by your DocuSign administrator.
- [Locked items](#). How to limit the changes that can be made when a template is used to send an envelope.
- [Using Shared Templates](#). Use templates that others have shared with you.
- [Apply templates](#). Apply template settings only to the documents you upload to send.

## Using Shared Templates

Besides the templates you create for yourself, other template owners may choose to share templates with you. Templates can be shared in two ways: directly or through a shared template folder. This guide explains how shared templates are presented in your account, and how to use them.

### CONTENTS

[Folders for shared templates](#)

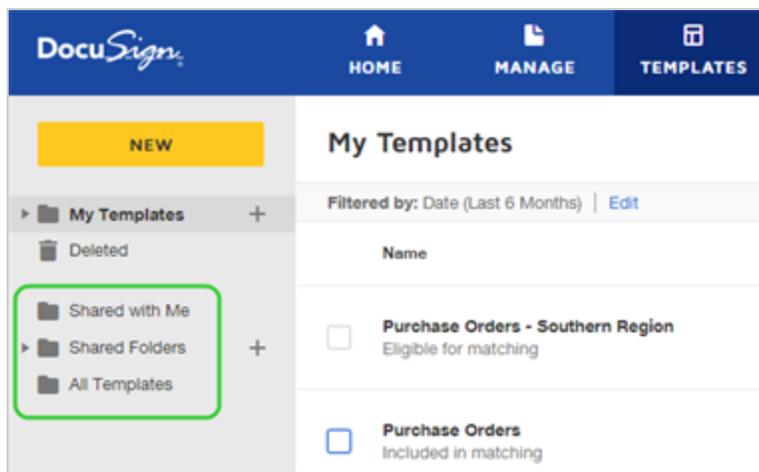
[How to use a shared template](#)

[How to search for shared templates](#)

## How to identify who owns a template shared with you

### Folders for shared templates

Provided you have the necessary user permissions to use templates, your Templates page includes a set of folders for shared templates:



These folders are defined as follows:

- **Shared with Me** – Contains all the templates that are shared with you directly, that is, not through a shared template folder.
- **Shared Folders** – Contains any shared template folders that others created and shared with you, either as an individual or as part of a group to which you belong. Any templates added to a shared template folder are automatically shared to anyone with access to that folder. If you have the necessary permissions to share templates yourself, then Shared Folders also contains any folders you create to share with others on your account. [More info...](#)

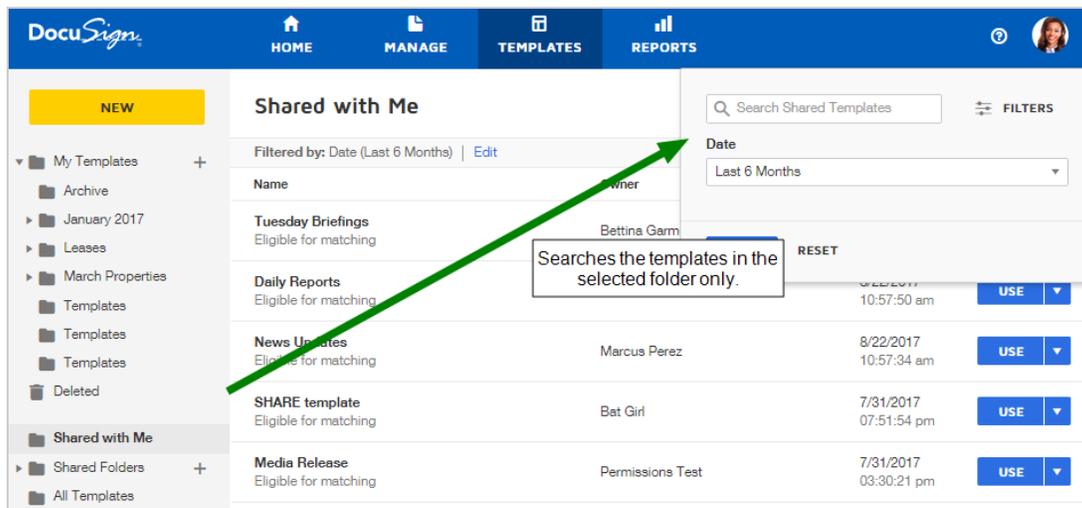
- **All Templates** – Contains all of the templates that you have access to, including the templates you created and any shared with you in any fashion (either directly or through a folder).

### To use a shared template

1. Navigate to the Templates page.
2. Locate the shared template and click **USE**.
3. If the template is complete (contains at least one recipient, one document, and one field), you can fill in the recipient information for any role recipients, and either send as is, or select **Advanced Edit** to further customize your document.
4. If the template is not complete, follow the standard process to use a template and complete all required information and customize your document as needed.

### To search for a shared template

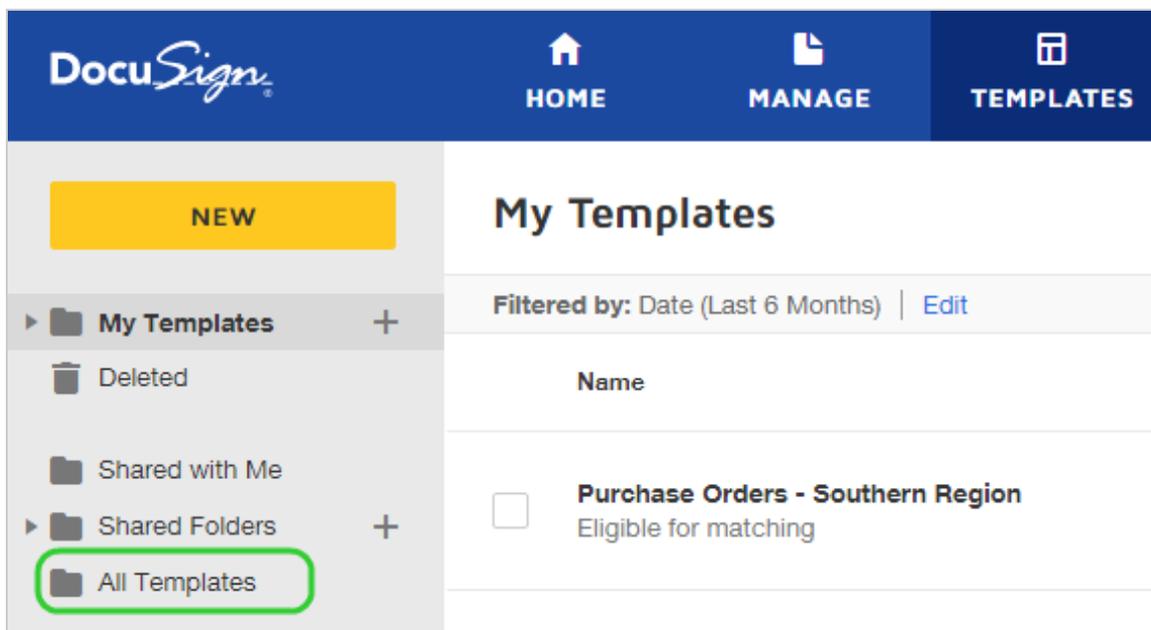
You can use the Search box and filter by date to locate a shared template. These controls work on the selected folder only.



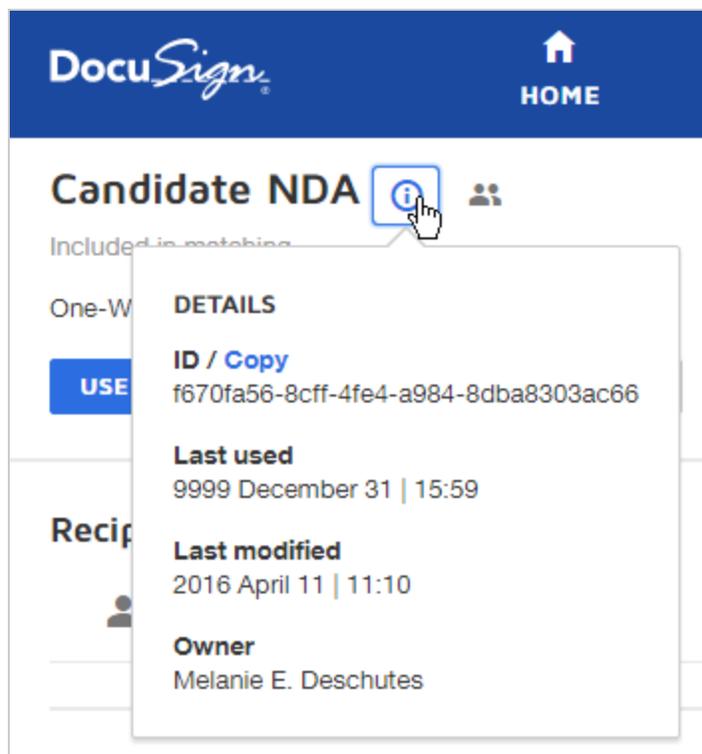
- **To search within a specific folder**, click on the folder to select it, and then enter your search or filter criteria. Folder search is strictly limited to the folder; it does not include results from any sub-folders present.
- **To search all templates you have access to**, click on the **All Templates** folder and enter your search or filter criteria.

To identify who owns a shared template

1. Navigate to the Templates page.
2. Select the **All Templates** folder.



3. Locate the shared template by searching or simply scanning the templates listed.
4. Click the template title to select it and open the Template Details view.
5. Click the information icon to reveal the template owner's name and other template details.



## Locate a Template ID

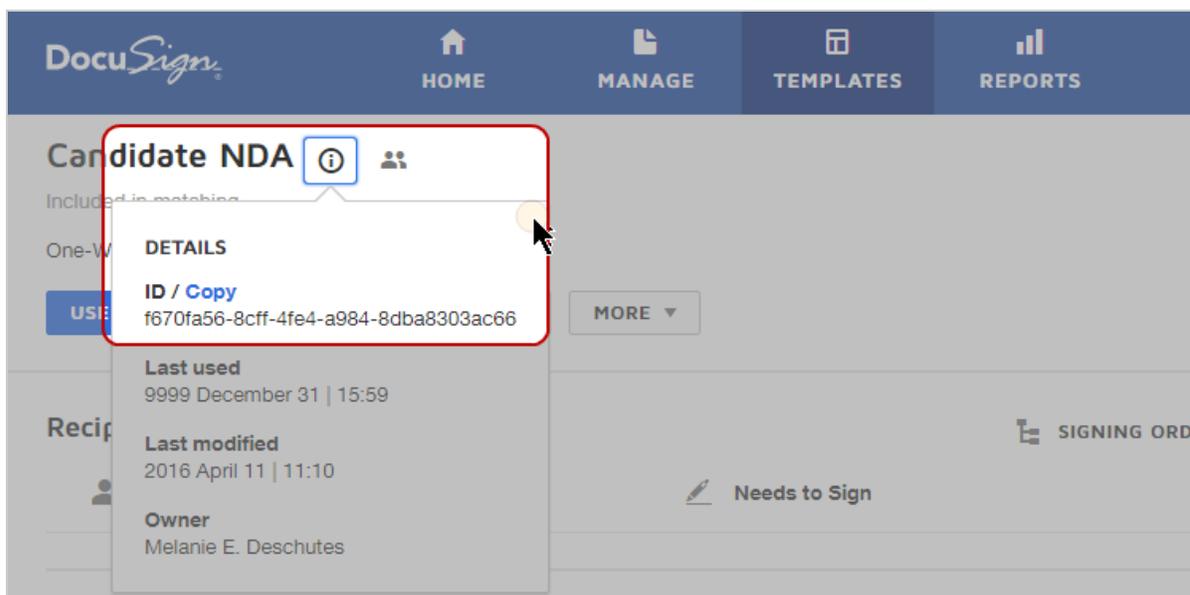
The Template ID is a unique identifier for a template. This identifier is useful for API developers using the DocuSign API.

The Template ID is available from the Template Details view.

### To locate a Template ID

1. Navigate to the **Templates** page.  
The Template list appears, showing your saved templates.

2. Locate the template for which you want to get the Template ID by searching, filtering, or simply scanning the Template list.
3. Click the template title to select it and open the Template Details view.
4. Select the information icon next to the template name to open the advanced details. These details include the Template ID.



5. (Optional) Use the **Copy ID** link to copy the Template ID to your clipboard.

## Merging Duplicate Recipients

Note: This guide is under construction. Content coming soon.

## Set Template Matching Behavior

As a template creator or a DocuSign administrator, provided you have [enabled template matching on your account](#), you can set matching behavior on the individual templates that you own or administer. Template matching speeds up envelope preparation by importing the recipients, messages, and recipient fields from the template.

### CONTENTS

[Specify whether a template is included in matching](#)

[Set custom IDR zones to use for matching](#)

[Related topics](#)

## Include or exclude templates from template matching

The matching state determines if the template is evaluated for template matching when you [add files](#) to your envelope. An individual template can be in one the following matching states:

- **Eligible for matching**

When you create a template, it is automatically eligible for template matching. When you upload files to DocuSign, eligible templates are included in the pool of templates evaluated for a match. The template remains eligible as long as it has been used within the past 120 days. This is the default matching state for all templates.

After 120 days of no activity on an eligible template, the matching state switches to Excluded. The template remains in your account, it is just not used for matching.

If the excluded template is used (either manually applied to a document or used to create an envelope) or modified, then the matching state reverts to Eligible and the 120 day countdown starts over.

- **Included in matching**

If you set the matching behavior for a template to Included, then it is always checked for a match. The template remains in the matching pool and never times out.

You can set an included template to Excluded.

- **Excluded from matching**

If you set the matching behavior for a template to Excluded, then it is never checked for a match. The template remains in your account and you can still use it to create a document or apply it manually to an uploaded file.

If an excluded template is used or modified, then the matching state reverts to Eligible.

## To check and set matching behavior on a template

1. Navigate to the **Templates** page.
2. Locate the template you want to check by searching, filtering, or simply scanning the Template list.
3. The current matching state is shown in the Templates list.

Name	Owner	PowerForms	Last change
<input type="checkbox"/> <b>TEST - Do Not Use</b> Excluded from matching	Melanie E. Deschutes		2017 July 26   18:01
<input type="checkbox"/> <b>Purchase Orders(1)</b> Eligible for matching	Melanie E. Deschutes		2017 July 26   17:59
<input type="checkbox"/> <b>Purchase Orders</b> Included in matching	Melanie E. Deschutes		2017 July 26   17:48

4. To set matching behavior from the Template list:
  - a. Select one or more templates by clicking the check box next to the template name.
  - b. Click **More** and select the matching behavior from the list.
    - **Include in Matching** - template remains in the matching pool until you exclude or delete it.
    - **Exclude from Matching** - template is removed from the matching pool until you

include it again or edit the template.



The screenshot shows a table of templates with a 'MORE' dropdown menu open over the 'Purchases' row. The table has columns for Name, Owner, PowerForms, and Last change. The 'Purchases' row is highlighted in blue and has a 'USE' button. The 'Purchase Orders' row is also highlighted in blue and has a 'USE' button. The 'MORE' dropdown menu has three options: 'Include in Matching', 'Exclude from Matching', and 'Delete'. A mouse cursor is pointing at the 'Include in Matching' option.

Name	Owner	PowerForms	Last change
<input checked="" type="checkbox"/> <b>Purchases</b> Eligible for matching	Melanie E. Deschutes		2017 July 28   12:31
<input checked="" type="checkbox"/> <b>Purchase Orders</b> Included in matching	Melanie E. Deschutes		2017 July 26   17:48

5. To check and set matching from the Template Details view, the current matching behavior appears below the template title, and you can change the current setting from the **More** list.

The screenshot shows the DocuSign interface for a template titled "Purchase Orders - Southern Region". The top navigation bar includes "HOME", "MANAGE", and "TEMPLATES". Below the title, there is a status "Eligible for matching" and a description: "Use this template for all PO reqs for the southern region." Action buttons include "USE", "EDIT", "MOVE", "SHARED (4)", and "MORE". The "MORE" dropdown menu is open, showing options: "Delete", "Create PowerForm", "Create a Copy", "Download", "History", "Include in Matching", and "Exclude from Matching". The "Include in Matching" and "Exclude from Matching" options are highlighted with green boxes. Below the dropdown, the "Recipients" section shows "signer 1:" and the "Message" section shows "Subject".

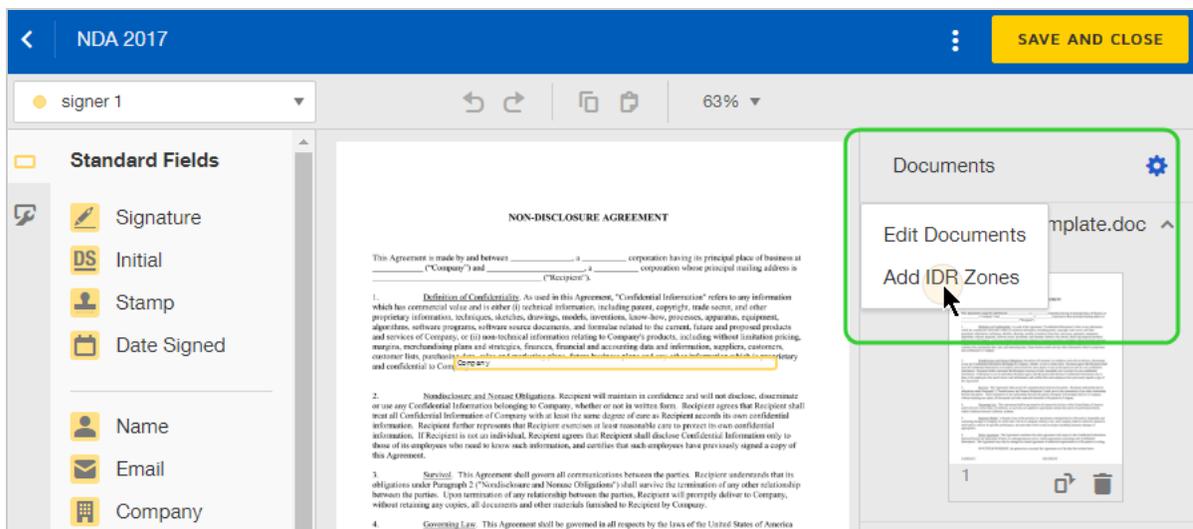
## Set custom IDR zones

Intelligent Document Recognition (IDR) is the process that reviews the text and information in a document to determine if it matches a saved template. By default, template matching examines the first and last 25 words in a document. To get more precise matching, you can add custom IDR zones to your template documents. This is useful if you have multiple documents with similar opening and closing texts. You can set IDR zones to focus on unique portions of the document.

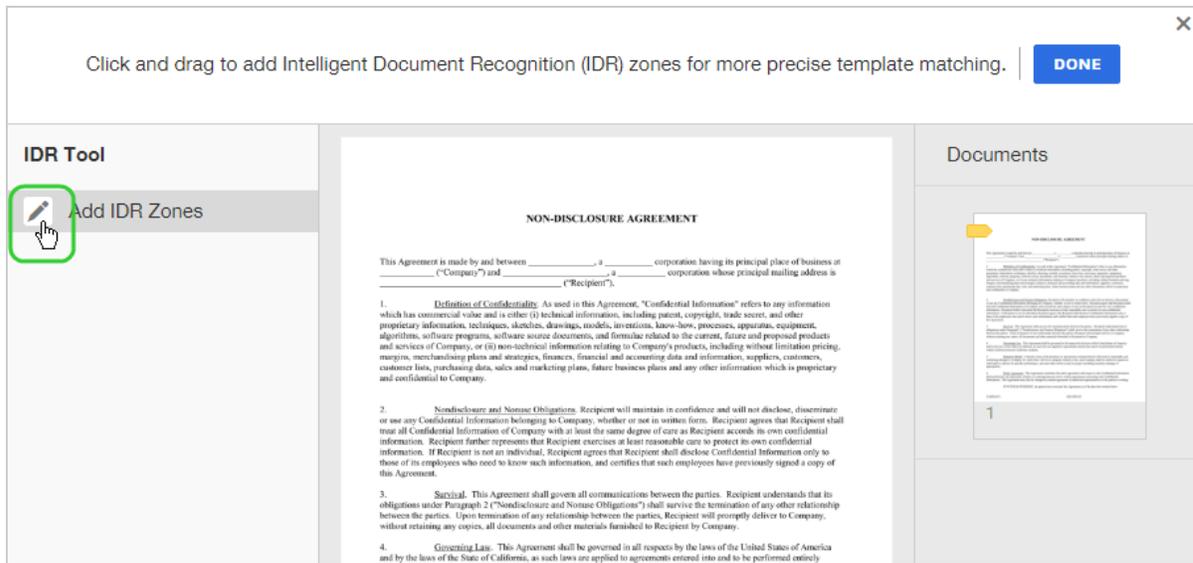
You can select any region of text within a document for IDR. There is no limit to the maximum or minimum volume of text you can select to define a match. However, the less text you select, the more false positive matches are likely, and the more text you select, the longer the matching process will take.

## To set or edit custom IDR zones

1. Navigate to the **Templates** page.  
The Template list appears, showing your saved templates.
2. Locate the template you wish to edit by searching, filtering, or simply scanning the Template list.
3. Click the template title to select it and open the Template Details view.
4. Click **EDIT** to open the template for editing.
5. Click **NEXT** to continue to the Add Fields view for the template.
6. Click the **gear icon** at the top of the list of documents and select **Add IDR Zones**.



7. In the IDR Tool panel, click and drag the **Add IDR Zones** tool to the text you want to mark as an IDR zone.



8. Click and drag on any of the sizing handles in the corners of the IDR zone to encompass the area you want to use for matching. Click and drag to zone to move the box around on your document.

**NON-DISCLOSURE AGREEMENT**

This Agreement is made by and between \_\_\_\_\_, a \_\_\_\_\_ corporation having its principal place of business at \_\_\_\_\_ ("Company") and \_\_\_\_\_, a \_\_\_\_\_ corporation whose principal mailing address is \_\_\_\_\_ ("Recipient").

1. **Definition of Confidentiality.** As used in this Agreement, "Confidential Information" refers to any information which has commercial value and is either (i) technical information, including patent, copyright, trade secret, and other proprietary information, techniques, sketches, drawings, models, inventions, know-how, processes, apparatus, equipment, algorithms, software programs, software source documents, and formulae related to the current, future and proposed products and services of Company, or (ii) non-technical information relating to Company's products, including without limitation margins, merchandising plans and strategies, finances, financial and accounting data and information, suppliers, customer lists, purchasing data, sales and marketing plans, future business plans and any other information which is proprietary and confidential to Company.

2. **Nondisclosure and Nonuse Obligations.** Recipient will maintain in confidence and will not disclose, disseminate or use any Confidential Information belonging to Company, whether or not in written form. Recipient agrees that Recipient will treat all Confidential Information of Company with at least the same degree of care as Recipient accords its own confidential information. Recipient further represents that Recipient exercises at least reasonable care to protect its own confidential information. If Recipient is not an individual, Recipient agrees that Recipient shall disclose Confidential Information only to those of its employees who need to know such information, and certifies that such employees have previously signed a copy of this Agreement.

3. **Survival.** This Agreement shall govern all communications between the parties. Recipient understands that its obligations under Paragraph 2 ("Nondisclosure and Nonuse Obligations") shall survive the termination of any other relationship between the parties. Upon termination of any relationship between the parties, Recipient will promptly deliver to Company without retaining any copies, all documents and other materials furnished to Recipient by Company.

4. **Governing Law.** This Agreement shall be governed in all respects by the laws of the United States of America.

9. Add additional zones as needed. When you're finished adding IDR zones, click **DONE** in the banner at the top of the page.
10. To edit existing zones, from the template Add Fields view, click the **Edit IDR Zones** link at the top of the Documents list.

The screenshot shows the DocuSign interface for a document titled "NDA 2017". The document content is a "NON-DISCLOSURE AGREEMENT" form with several fields. A yellow box highlights the "Company" field in the first paragraph. On the right side, there is a "Documents" list with a document titled "1Way-NDA\_templa...". A green box highlights the "Edit IDR Zones" link in the Documents list. The interface includes a top navigation bar with a back arrow, a search icon, and a "SAVE AND CLOSE" button. Below the navigation bar, there is a "Standard Fields" panel with options for Signature, Initial, Stamp, and Date Signed. The document preview area shows the text of the agreement with the "Company" field highlighted.

11. Edit the zones as follows:
  - To change the location of a zone, click and drag it to the new position.
  - To remove a zone, click to select it, and then press **DELETE** on your keyboard.
  - To resize a zone, click to select it, and then click and drag on any one of the sizing handles at the corners of the zone.
12. When you are finished adding and editing IDR zones, click **DONE**, and then **SAVE AND CLOSE** the template.

## Related Topics

- [Set Template Matching Account Preferences](#). Information on how to enable template matching for your account.

## Download and Upload Templates

The ability to download and upload templates is useful when you need to move copies of templates around. You can use the download and upload functions to copy templates between users and between accounts, and even between DocuSign environments.

**Note:** You must have the appropriate template permission setting (*create* or *share*) in order to download or upload templates. This setting is controlled by your account administrator, as described in the [Permission Sets](#) guide.

## CONTENTS

[Download templates](#)

[Upload templates](#)

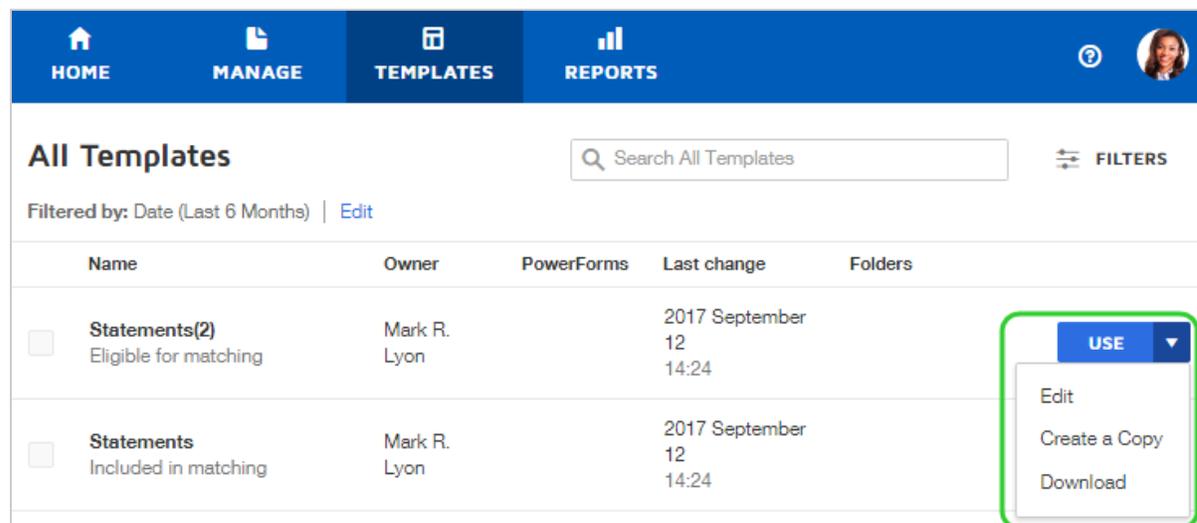
[Use cases for downloading and uploading templates](#)

## Download templates

You can download any template available in your account. This includes both the templates you create and those created by others and shared with you. You can download templates one at a time or in bulk. Downloading a single template from the template details view exports a copy of the template in JSON format. If you select one or more templates from the Templates page to download, they are delivered in JSON format in a .ZIP file.

### To download one template

1. Navigate to the **Templates** page.  
The Template list appears, showing your saved templates and the templates shared with you.
2. Locate the template you wish to download by searching, filtering, or simply scanning the Templates list.
3. Click the template actions menu and select **Download**.



The screenshot displays the 'All Templates' interface. At the top, there are navigation tabs: HOME, MANAGE, **TEMPLATES**, and REPORTS. A search bar labeled 'Search All Templates' and a 'FILTERS' button are also present. Below the navigation, it indicates 'Filtered by: Date (Last 6 Months) | Edit'. The main content is a table with the following data:

Name	Owner	PowerForms	Last change	Folders
<input type="checkbox"/> <b>Statements(2)</b> Eligible for matching	Mark R. Lyon		2017 September 12 14:24	
<input type="checkbox"/> <b>Statements</b> Included in matching	Mark R. Lyon		2017 September 12 14:24	

A context menu is open over the first row, containing the following options: **USE** (highlighted with a green box), Edit, Create a Copy, and Download.

4. A .ZIP file containing a copy of the template in JSON format is saved to your Downloads folder. The file name is "DocuSignTemplates\_[date\_and\_time].zip".

### To download multiple templates at once

1. Navigate to the **Templates** page.
2. Select the **All Templates** folder and locate the templates you wish to download by searching, filtering, or simply scanning the list.

The screenshot shows the DocuSign interface for managing templates. The top navigation bar includes HOME, MANAGE, TEMPLATES, and REPORTS. The left sidebar shows a folder structure with 'All Templates' selected. The main content area is titled 'All Templates' and shows a list of templates. A filter dropdown is open, showing 'Date' set to 'Last 30 Days'. The list of templates includes:

Name	Owner	PowerForms	Last change	Folders	Actions
<input type="checkbox"/> Approval - Accounting Eligible for matching	Melanie E. Deschutes				
<input type="checkbox"/> Draft - certification forms(1) Eligible for matching	Melanie E. Deschutes	15:38		My Templates	USE
<input type="checkbox"/> Statements Eligible for matching	Melanie E. Deschutes		2017-09-21 14:43	My Templates	USE

3. Select the checkboxes next to the templates you want to download.
4. Click the **MORE** drop down and select **Download**.

The screenshot shows the DocuSign interface for managing templates. The top navigation bar includes HOME, MANAGE, TEMPLATES, and REPORTS. The left sidebar shows a folder structure with 'All Templates' selected. The main content area is titled 'All Templates' and shows a list of templates. A filter dropdown is open, showing 'Date' set to 'Last 30 Days'. The list of templates includes:

Name	Owner	PowerForms	Last change	Folders	Actions
<input checked="" type="checkbox"/> Approval - Accounting Eligible for matching	Melanie E. Deschutes		2017-09-28 10:09	My Templates	USE
<input type="checkbox"/> Draft - certification forms(1) Eligible for matching	Melanie E. Deschutes	15:38	2017-09-22 15:38	My Templates	USE
<input checked="" type="checkbox"/> Statements Eligible for matching	Melanie E. Deschutes		2017-09-21 14:43	My Templates	USE
<input type="checkbox"/> [Untitled] Eligible for matching	Melanie E. Deschutes		2017-09-21 10:45	My Templates	USE

A .ZIP file containing copies of the selected templates in JSON format is saved to your Downloads folder. The file name is "DocuSignTemplates\_[date\_and\_time].zip".

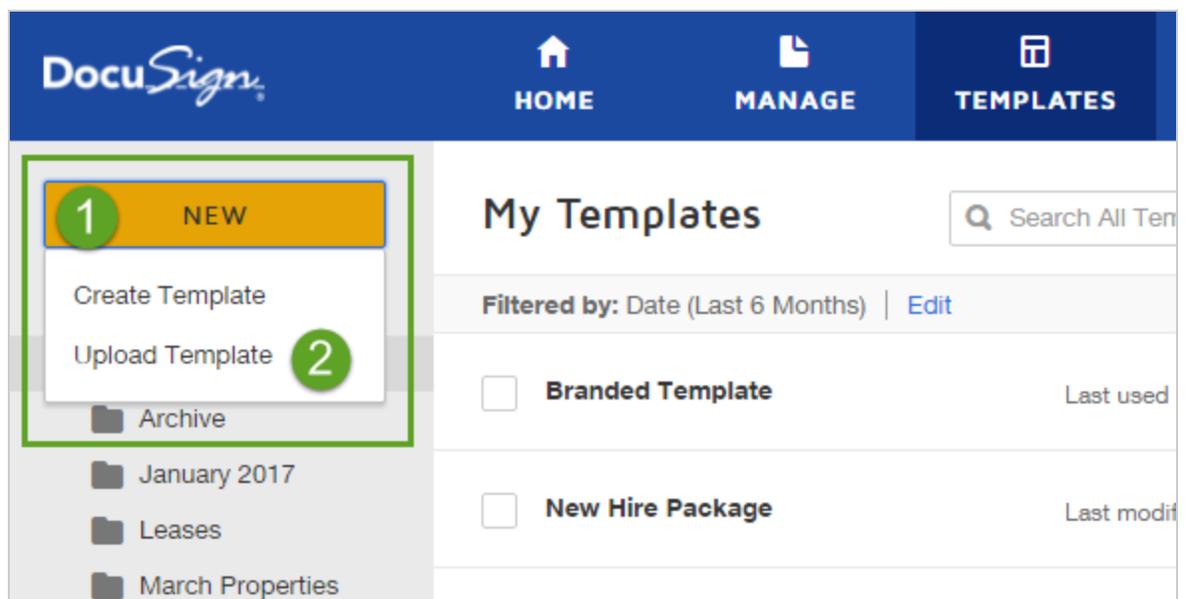
## Upload templates

When you upload a template, it creates a new template in your account and you are the owner of the template.

You can upload any individual template downloaded from DocuSign, originating from either the classic or new experience. You can upload individual templates in either JSON or XML format to any account using the new experience. You can also upload .ZIP files containing multiple templates. When you upload a .ZIP file, it creates separate templates for each file in the .ZIP file.

### To upload a template

1. Navigate to the **Templates** page.
2. Click **New** and select **Upload Template**.



3. Browse to the location of the template file you want to upload and open it.

You can upload an individual JSON or XML template file, or a collection of zipped template files. If you upload a zipped file, the system automatically unzips and creates individual templates.

4. The new template appears at the top of your Templates list.

If an uploaded template has the same name as an existing template, the name of the uploaded template has a number in parenthesis added to the template name.

## Common use cases

Templates are downloaded in JSON format when downloaded one at a time from the Template details view. If you select one or more templates from the Templates page to download, they are delivered in JSON format in a .ZIP file. You can edit the template using a standard text editor or a specialized editor. To send the downloaded file to another DocuSign user, use your email or other shared file service. Once the person receives your file, they can upload it to their account.

Some common use cases for downloading and uploading templates:

- Give a copy of a template to someone in a different DocuSign account
- Troubleshoot a template issue with DocuSign Customer Support
- Move a copy of a template developed in your DocuSign demo account to your production account
- Receive a template built for you by DocuSign Professional Services

## Template Folders

Template folders provide a way to organize your Templates list. You create folders from the Templates page. Once you create one or more folders, you can file your Templates into folders.

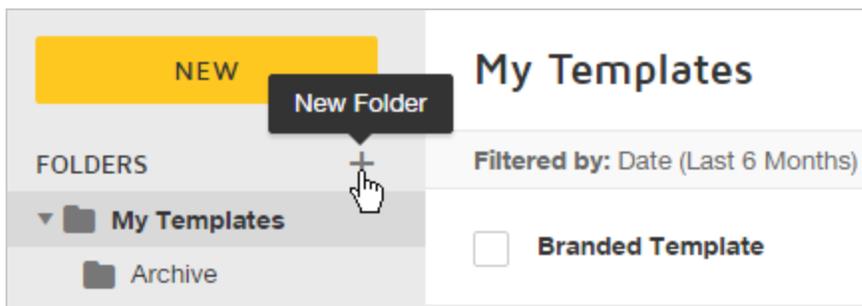
### CONTENTS

[Create, edit, and delete folders](#)

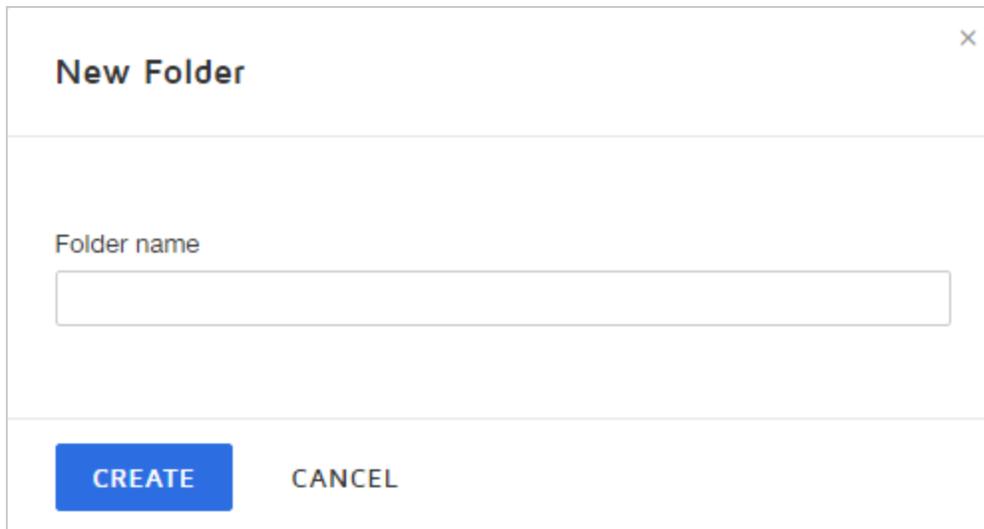
[Move a template into a folder](#)

### To create, edit, and delete folders

1. Navigate to the Templates page.
2. To create a folder:
  - a. In the left-hand navigation pane, click the + icon next to **FOLDERS**.

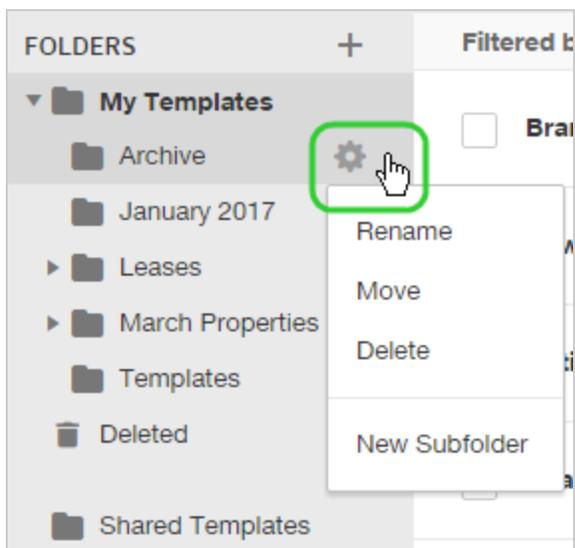


- b. Enter a folder name and click **CREATE**.



A dialog box titled "New Folder" with a close button (X) in the top right corner. Below the title is a text input field labeled "Folder name". At the bottom of the dialog, there are two buttons: a blue "CREATE" button and a "CANCEL" button.

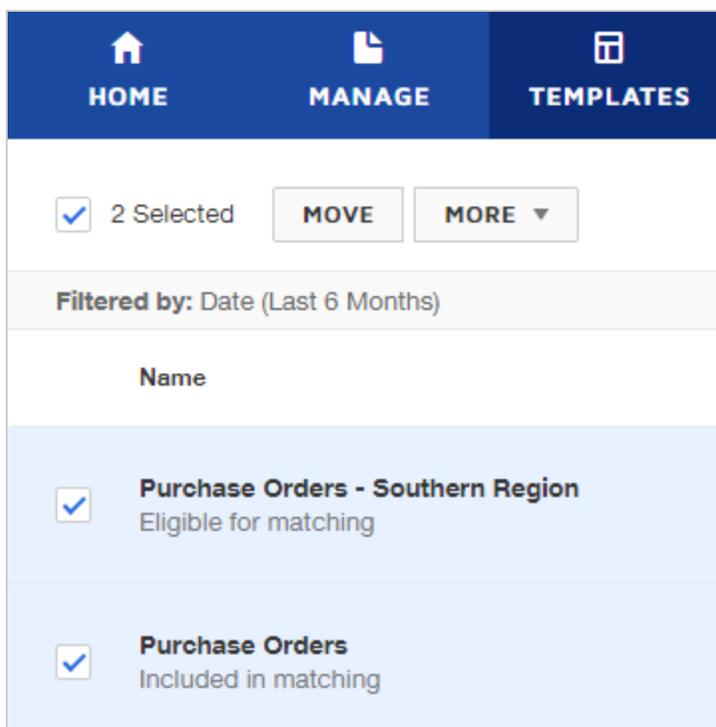
3. To rename, move, or delete an existing folder, hover over the folder name and click the **gear** icon.



4. To create a subfolder, hover over the folder name and click the gear icon to the right, and select **New Subfolder**.

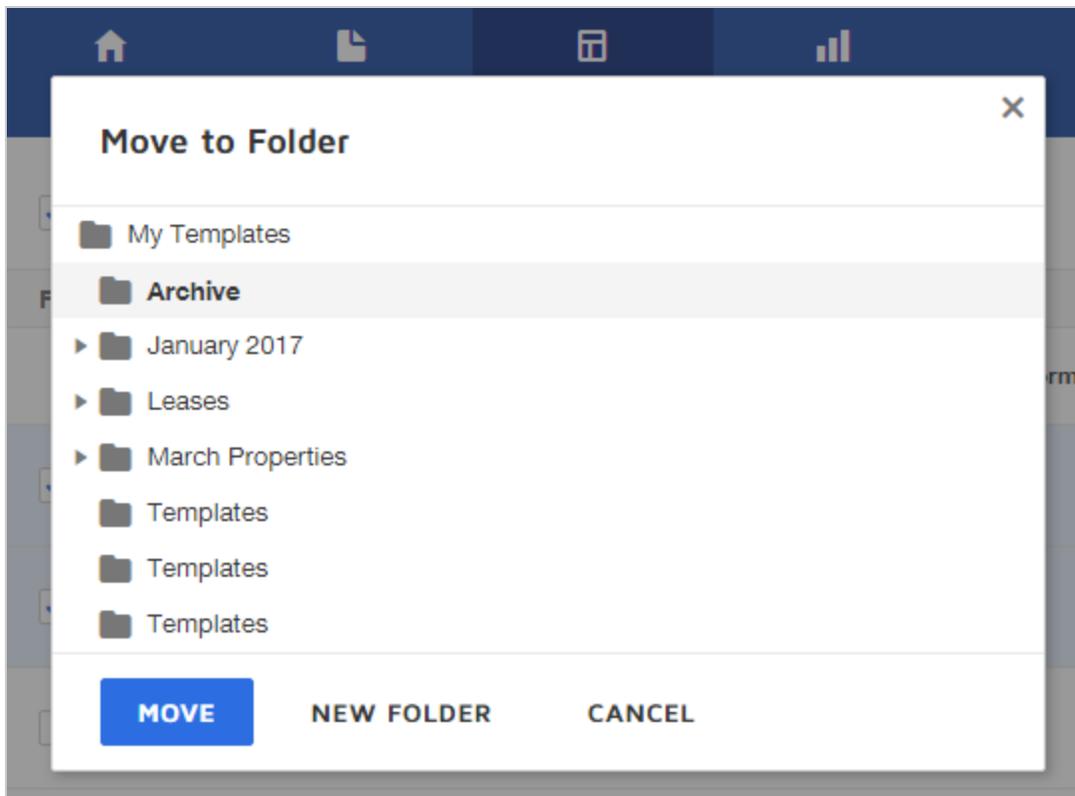
## To move a template into a folder

- **From the Templates list:**
  - Select one or more templates and click the **Move** button and select the folder to move to. You can also drag and drop selected templates to a folder.



- To move one template, click the Template actions menu and select **Move**. Then select

the folder to move the template to and click **MOVE**.



- **From the Template details view:**
  - Click **MOVE** and select a folder to move to.

## Monterey Conference Online Registration

Eligible for matching

Online registration for 2017 investment conference.

[USE](#) [EDIT](#) [MOVE](#) [SHARED \(3\)](#) [MORE ▾](#)

---

### Recipients

 <b>Attendee:</b>	 <b>Needs to Sign</b>
 <b>Conference Manager: Mike Marsh</b> mike.marsh@mailinator.com	 <b>Needs to Sign</b>

## Using PowerForms

A PowerForm is a way to create self-service documents for signature without writing any code. A PowerForm is initiated from a unique, secure URL that you make available for signers to complete.

### CONTENTS

[Overview](#)

[Create a PowerForm](#)

[Edit a PowerForm](#)

[Distribute a PowerForm](#)

[View PowerForm responses and download data](#)

## Overview

With PowerForms, you can create a DocuSign transaction without having to send the documents from your DocuSign account. You can link the PowerForm on your website, or distribute as a secured link through email. Signers can access and sign your forms on demand, making PowerForms a way to capture signatures and data from people whom you do not know ahead of time.

PowerForms are created from templates. To [create a PowerForm](#), you first create a template, then create a PowerForm from the template. For an extra layer of recipient authentication, you can require signers to complete an email validation before they can access and sign the PowerForm.

Data from all [responses](#) to a PowerForm can be retrieved as a CSV file for use in other applications.

### **Example – Event Registration**

Your company is getting ready for its annual conference. The conference is open to anyone interested in your company. Since you don't have a specific invitation list, in order to allow anyone to sign up, you create a PowerForm for registration and post the link to the form on your company's website. Prospects visit the website and sign up using the DocuSign PowerForm. Once the conference registration closes, you download a CSV file containing all of the form data collected in the PowerForm, and you use the data to see who is attending, and plan for the event.

### **User permission requirements**

You must have the appropriate permissions set for your account and your user ID in order to create, use, and manage PowerForms. If you are not able to follow the instructions in

this section, check with your account administrator to see if you have the necessary permissions. For details about PowerForm role permissions, see [Permission Sets](#).

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## Advanced PowerForms topics

To go further with PowerForms, refer to the following advanced topics:

- [Embed a PowerForm](#)
- [Populate Custom Fields in a PowerForm](#)

## Create a PowerForm

A PowerForm is a way to create a self-service document for signature without writing any code. A PowerForm is initiated from a unique, secure URL that you make available for signers to complete. For example, your company creates a Powerform for employee PTO requests, and posts the link to the request form on the company intranet.

### CONTENTS

[Overview](#)

[Create a PowerForm](#)[Test a PowerForm](#)[Template requirements for a PowerForm](#)

## Overview

PowerForms are created from a saved template. Only a single template can be referenced by the PowerForm. Once a PowerForm is created, you can change the associated template. The template must meet [certain requirements](#) to be used for a PowerForm.

**IMPORTANT:** To create or edit a PowerForm, you must have **PowerForm Administrator** permissions. If you are not able to follow the instructions in this section, check with your account administrator to see if you have the necessary permissions. For more information on setting user permissions see [Permission Sets](#).

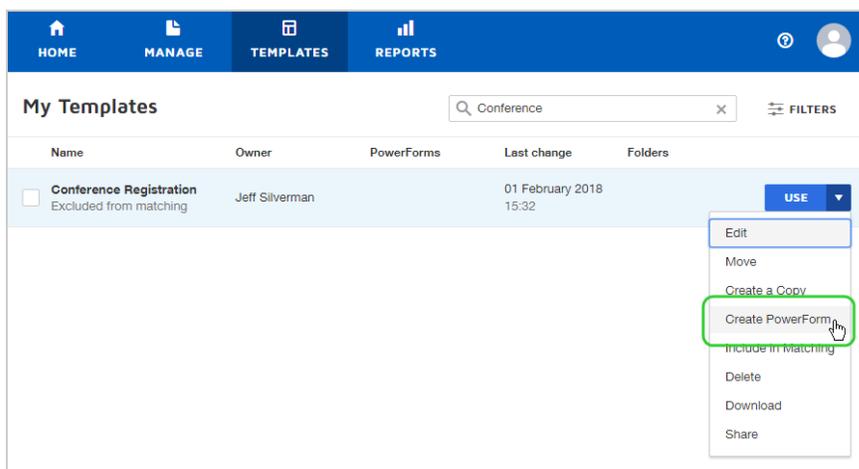
The person who creates a PowerForm, by default, becomes the PowerForm sender and is the sender of the envelopes generated by the form. The PowerForm creator can [change the sender](#) to any other user on the account who has the necessary permissions. The PowerForm sender has the PowerForm-generated envelopes in their account as sent items. The sender is also the person who receives the email notifications when a PowerForm is completed.

The following procedures assume that you have a completed template ready to use for your PowerForm. See [Create Templates](#) for more information on how to prepare a template and the [Template requirements](#) section in this guide.

## To create a PowerForm

To create a PowerForm, you must have **PowerForm Administrator** permissions.

1. From the Templates page, locate the template you want to use for your PowerForm.
2. Click the actions menu and select **Create PowerForm**.



3. The Create PowerForm view appears.

The summary information is prefilled from the template information.

Conference Registration

## Create PowerForm

A PowerForm is an envelope initiated from a URL that you make available for signers to complete.

**Name \***

**Envelope Subject \***

**Instructions for First Recipient Only**

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

**CREATE**

**SUMMARY** | **OPTIONS**

**PowerForm Name**

Conference Registration

**Templates** | [Replace](#)

Conference Registration

**Recipients**

1 **ATTENDEE**

Needs to Sign

4. Complete the Summary information as follows:

- **Name.** The name of your PowerForm. This field is prefilled with the name of the template, but you can change it to anything you like.
- **Envelope Subject.** This subject represents the name of the envelopes generated from the PowerForm. This field is prefilled with the subject from the template, and most likely you'll want to use this, but you can change it. You can customize the subject line by using merge fields to insert a recipient's name or email address. When recipients complete your PowerForm, the merge fields are added to the title, making it easier to identify and locate specific responses on the Manage page. If you choose to use the email validation option for the PowerForm, this entry is also the subject of the email the signer receives.

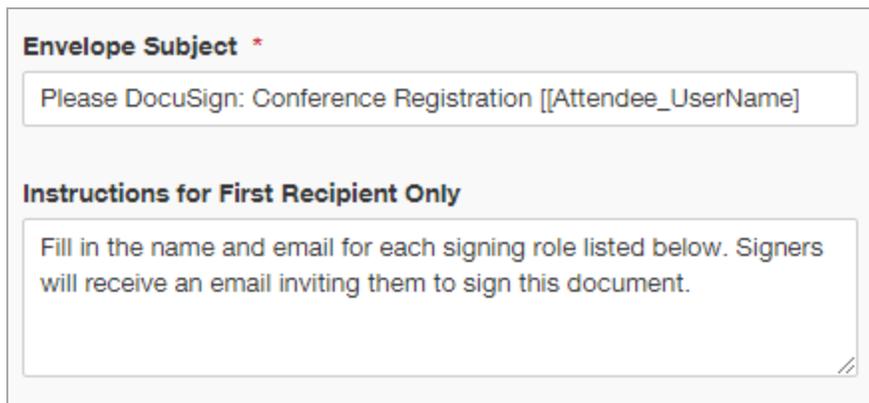
To add merge fields to the subject:

- a. Click in the **Email Subject** field.
- b. Select the merge field icon inside the field:



The screenshot shows a text input field labeled "Email Subject" containing the text "Please DocuSign: Assessment PDF Form". A small square icon with a right-pointing arrow is located at the end of the text. This icon is highlighted with a green rounded rectangle, indicating it is the merge field icon.

- c. Select the merge fields to insert in the email subject. Fields for the name and email address for each role on the underlying template are listed to choose from.



The screenshot shows a text input field labeled "Envelope Subject \*" containing the text "Please DocuSign: Conference Registration [[Attendee\_UserName]]". Below this field is a section titled "Instructions for First Recipient Only" with a text area containing the following text: "Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document." There is a small pencil icon in the bottom right corner of the text area.

- **Instructions for First Recipient Only:** Instructions for the first signer on how to complete your PowerForm. These instructions appear below the PowerForm Signer Information when a signer initiates the form. The field is pre-filled with default instructions. You can leave the default text in place or replace it with your own custom information, or leave it blank if you wish.
5. Click the **OPTIONS** tab to set additional options for your PowerForm.

**SUMMARY**    **OPTIONS**

---

**Email Validation** ⓘ

Require email validation

---

**Usage Settings**

Set usage limit by quantity

Set usage limit by time between submissions

- **Email Validation:** Signer must verify their identity through email before accessing and signing the PowerForm. Recipient provides email address and then receives a validation code for the PowerForm. Recipient must retrieve the code and provide it in order to sign. This option enables the following field:
  - **Email Message** - Once the signer passes the email validation step, this text is presented at the top of the browser window, above your PowerForm documents. Most likely, you'll want to use the same message as used for the template on which the PowerForm is based.

**Note:** Your account setting may require email validation for all PowerForms. Check with your account administrator for more information.

- **Usage Settings:** Usage limits lets you control how much or how often your PowerForm is used. Your account plan may allow for only a limited number of PowerForm documents, so limiting the usage would be important to controlling your allotment. Specify limits for usage of your PowerForm as follows:

**Usage Settings**

Set usage limit by quantity

**Maximum # of Responses**

Your PowerForm will be disabled when limit is reached.

Set usage limit by time between responses

**Minimum Time Between Responses**

Your PowerForm will be disabled when limit is reached.

**Maximum # of Responses** - enter a whole number to specify how many envelopes can be generated from the PowerForm.

**Minimum Time Between Responses** - enter a whole number and select a time period to specify how often the PowerForm can be used to generate an envelope.

6. Click **CREATE** to create and activate your PowerForm.

Your PowerForm is ready to use, but you should [test it](#) before you distribute it for signers to access.

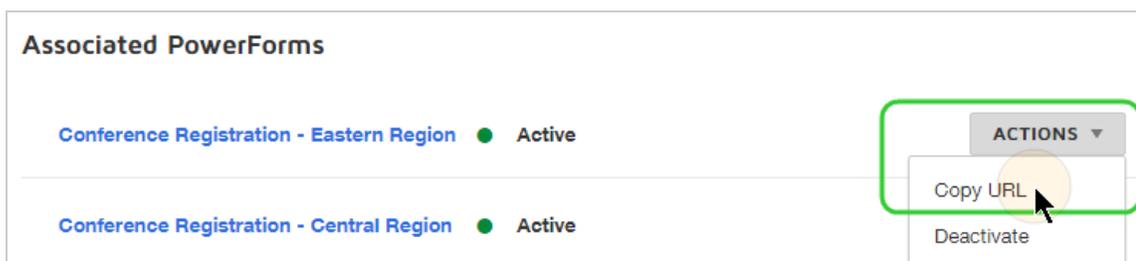
PowerForm URL ×

URL

## To test your PowerForm

Once you create a PowerForm, you should test it before distributing it for signers to access. If you find you need to make changes, see [Edit a PowerForm](#).

1. Initiate the PowerForm in one of the following ways:
  - a. From the PowerForm URL dialog, select the **URL LINK** tab and click **COPY**. Then paste the copied link into a browser.
  - b. From the Template Details view, in the Associated PowerForms section, click the **ACTIONS** menu and select **Copy URL**. Then paste the copied link into a browser.



2. In the PowerForm Signer Information form, enter your name and email address, and click **Begin Signing**.

## PowerForm Signer Information

Please enter your name and email to begin the signing process.

Your Role:  
**Attendee** \*

Your Name:

Your Email:

[Begin Signing](#)

Complete this registration by February 28, 2015. You will receive a conference packet by email 24 hours after you register.

POWERED BY  English (US) ▲ [Terms Of Use](#) | [Support](#) |

3. If your PowerForm requires email validation, retrieve the validation code from your email and enter it. Your PowerForm document displays.

## Please Review & Act on These Documents



**Melanie Deschutes, CPM**  
Melanie Deschutes Properties



Powered by **DocuSign**

Join us in Monterey! This year's conference promises to be our biggest and best ever.

Please review the documents below. [CONTINUE](#) [OTHER ACTIONS ▾](#)

DocuSign Envelope ID: 9463DBE0-4826-449F-AF38-F7E256283D5B

DEMONSTRATION DOCUMENT ONLY  
PROVIDED BY DOCUSIGN ONLINE SIGNING SER  
1301 2nd Ave, Suite 2000 ?Seattle ?Washington 98  
www.docusign.com

### Conference Registration Form

We thank you for your interest in participating at our conference! Fill in our online Conference Registration Form below to receive your badge number and the schedule of the entire event.

- Once you finish signing, you can review your completed envelope as described in [View PowerForm Responses](#).

If everything is working as expected with the PowerForm, you can [distribute it for signers to access](#).

## Template Requirements for PowerForms

When creating a PowerForm from a template, consider the following:

- First recipient must be a placeholder role.** The template can have more than one recipient, and you can use a mix of placeholder and person (named) recipients. However, the first recipient must be a placeholder. A placeholder is just a role, not a named recipient. So on the template, the recipient is represented by the entry in the Role field only—the Name and Email fields are left empty. The role can be anything, for example "Signer", "Contractor", "approver 1", and so on.

- **A PowerForm is initiated from the PowerForm URL by the first recipient in the signing order;** other recipients must initiate signing from an email notification.
- **To control who initiates the PowerForm, use a signing order in the associated template.** The first recipient (which must be a placeholder, not a named person) initiates the PowerForm.
- **Collaborative fields are not recommended.** [Collaborative fields](#) allow signers to negotiate changes with one another. If your PowerForm is distributed without requiring email validation, collaborative fields that require changes to be approved by all signers will not work.
- **Document visibility settings are not supported in PowerForms.** A PowerForm signer will see all documents that exist in the PowerForm's associated template, regardless of any document visibility settings applied on the template.
- **Changes to the associated template may take up to 20 minutes to be reflected in a PowerForm.** If changes are made to the template associated with a PowerForm, there can be a delay in those changes being applied to any PowerForms initiated by signers. You can [test your PowerForm](#) to verify the changes are live.

**Note:** If you want to specify the name and email information for the first recipient, you can pre-populate the recipient's information in the PowerForm by [customizing the URL](#)

## Edit a PowerForm

You can modify an existing PowerForm, and your changes apply to any future use of the PowerForm. You can edit the PowerForm details and you can make changes to the associated template. (Note that changes to the associated template may take several

minutes to be reflected in the PowerForm.) If you delete the template, the associated PowerForm is also deleted, while any completed envelopes from the PowerForm remain in your account.

## CONTENTS

[Edit a PowerForm](#)

[Edit a PowerForm from the Templates page](#)

[Deactivate or delete a PowerForm](#)

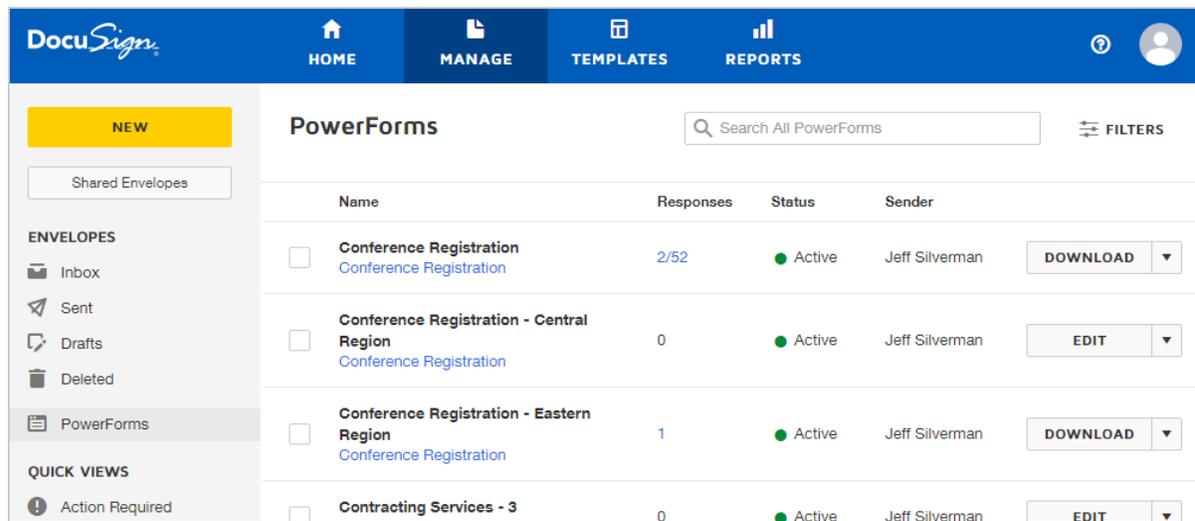
[Change the PowerForm sender](#)

**IMPORTANT:** To make changes to a PowerForm, you must have **PowerForm Administrator** permissions. If you are not able to follow the instructions in this section, check with your account administrator to see if you have the necessary permissions. For more information on setting user permissions see [Permission Sets](#).

## To edit a PowerForm

If you have the necessary user permissions, you can edit your PowerForms to make changes to the PowerForm settings, such as the name or the email validation required setting, or replace the template associated with a PowerForm.

1. From the Manage page, select the **PowerForms** folder on the left to display all of your PowerForms.



The screenshot displays the DocuSign PowerForms management interface. The top navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. A search bar is present with the text 'Search All PowerForms'. The main content area shows a table of PowerForms with the following data:

Name	Responses	Status	Sender	Actions
<input type="checkbox"/> <b>Conference Registration</b> Conference Registration	2/52	Active	Jeff Silverman	DOWNLOAD
<input type="checkbox"/> <b>Conference Registration - Central Region</b> Conference Registration	0	Active	Jeff Silverman	EDIT
<input type="checkbox"/> <b>Conference Registration - Eastern Region</b> Conference Registration	1	Active	Jeff Silverman	DOWNLOAD
<input type="checkbox"/> <b>Contracting Services - 3</b>	0	Active	Jeff Silverman	EDIT

2. Locate the PowerForm you want to edit by searching, filtering, or simply scanning the list.
3. To edit the PowerForm, depending on whether there are any responses for it and if you have access to the responses, do one of the following:
  - No responses or if you do not have access to the responses: click the **EDIT** button.
  - Responses received and you have access: click the actions menu and select **Edit**.

<input type="checkbox"/>	<b>Conference Registration - Central Region</b> Conference Registration	0	● Active	Jeff Silverman	EDIT
<input type="checkbox"/>	<b>Conference Registration - Eastern Region</b> Conference Registration	1	● Active	Jeff Silverman	DOWNLOAD

**No responses** (arrow pointing to the first row)

**Responses received** (arrow pointing to the second row)

- Edit
- View Envelopes
- Copy Url
- Deactivate
- Change Sender
- Delete

4. In the Edit PowerForm view you can modify the settings as described in [Create a PowerForm](#).

### Edit PowerForm

A PowerForm is an envelope initiated from a URL that you make available for signers to complete.

**Name \***  
Conference Registration - Central Region

**Envelope Subject \***  
Please DocuSign: Conference Registration [[Attendee\_Usel

**Instructions for First Recipient Only**  
Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

**SAVE & CLOSE**

**SUMMARY** | **OPTIONS**

**Status**  
● Active

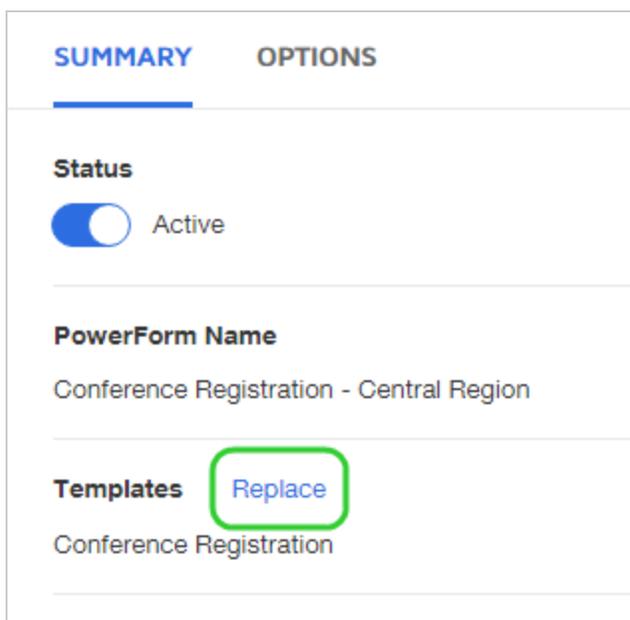
**PowerForm Name**  
Conference Registration - Central Region

**Templates** | [Replace](#)  
Conference Registration

**Recipients**

- 1 **ATTENDEE**  
Needs to Sign

5. To change the associated template for the PowerForm,
  - a. Select the **Summary** tab.
  - b. In the Templates section, click **Replace**.



The screenshot shows a configuration interface for a PowerForm. At the top, there are two tabs: "SUMMARY" (selected) and "OPTIONS". Below the tabs, there are three sections: "Status" with a toggle switch set to "Active", "PowerForm Name" with the text "Conference Registration - Central Region", and "Templates" with a "Replace" button highlighted by a green rounded rectangle. Below the "Replace" button, the text "Conference Registration" is visible.

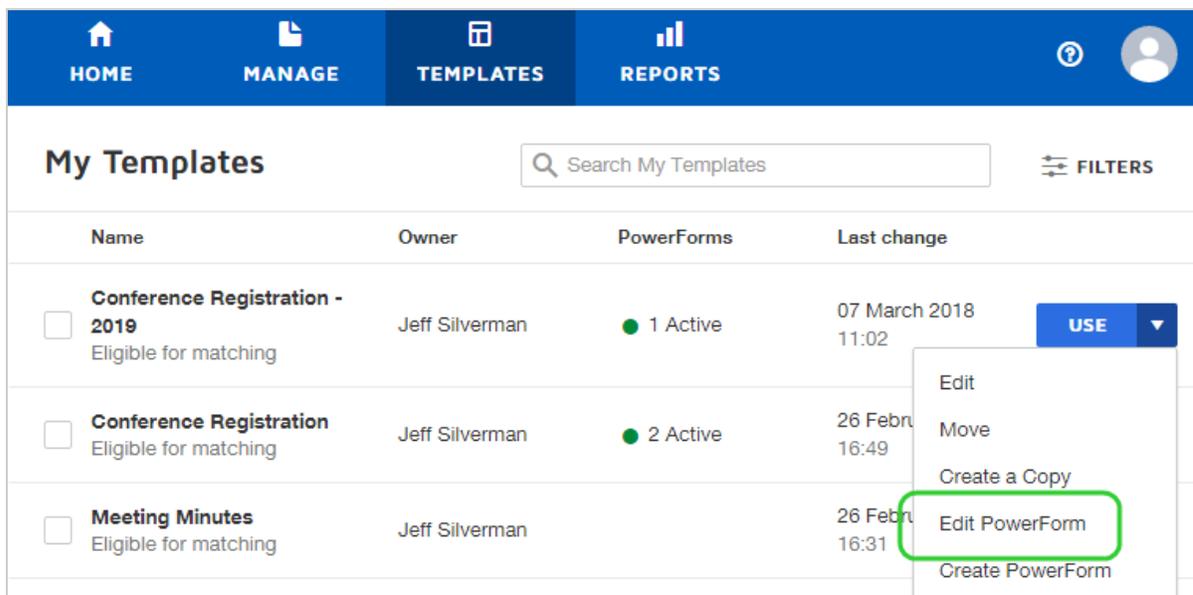
- c. In the Select Template dialog, locate and select the new template to use.
  - d. Click **REPLACE TEMPLATE**.

The new template association appears in the Edit PowerForm dialog. The URL for the PowerForm is unchanged.
6. When you are finished making changes, click **SAVE & CLOSE**.

## To edit a PowerForm from the Templates page

If you know which template's PowerForm you want to edit, you can start the process from the Templates page.

1. From the Templates page, locate the template with the PowerForm you want to edit.
2. Click the actions menu and select **Edit PowerForm**.



The screenshot displays the 'My Templates' interface. At the top, there are navigation tabs: HOME, MANAGE, **TEMPLATES**, and REPORTS. Below the tabs is a search bar labeled 'Search My Templates' and a 'FILTERS' button. The main content is a table with the following columns: Name, Owner, PowerForms, and Last change. The table lists three templates:

Name	Owner	PowerForms	Last change
<input type="checkbox"/> <b>Conference Registration - 2019</b> Eligible for matching	Jeff Silverman	● 1 Active	07 March 2018 11:02
<input type="checkbox"/> <b>Conference Registration</b> Eligible for matching	Jeff Silverman	● 2 Active	26 Febru 16:49
<input type="checkbox"/> <b>Meeting Minutes</b> Eligible for matching	Jeff Silverman		26 Febru 16:31

A dropdown menu is open for the 'Meeting Minutes' template, showing the following options: Edit, Move, Create a Copy, **Edit PowerForm** (highlighted with a green box), and Create PowerForm. A 'USE' button is also visible next to the first template.

If there are multiple PowerForms associated with the template, you can select the one you want to edit.

3. In the Edit PowerForm view you can modify the settings as described in [Create a Power-Form](#).
4. When you are finished making changes, click **SAVE & CLOSE**.

## To deactivate or delete a PowerForm

If you **deactivate** the PowerForm then it cannot be distributed to signers. You can reactivate the PowerForm at any time.

When you **delete** a PowerForm, only the PowerForm itself is deleted. The underlying template and any documents generated from the PowerForm are unaffected.

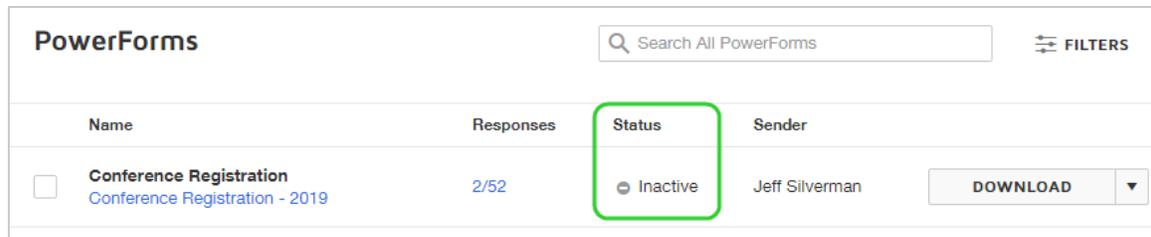
1. From the Manage page, select the **PowerForms** folder on the left to display all of your PowerForms.
2. Locate the PowerForm you want to edit and click the actions menu next to the PowerForm you want to modify and then select one of the following:

PowerForms		Search All PowerForms	FILTERS
Name	Responses	Status	Sender
<input type="checkbox"/> <b>Conference Registration</b> Conference Registration - 2019	2/52	● Active	Jeff Silverman
<input type="checkbox"/> <b>Conference Registration - Central Region</b> Conference Registration	0	● Active	Jeff Silverman
<input type="checkbox"/> <b>Conference Registration - Eastern Region</b> Conference Registration	1	● Active	Jeff Silverman
<input type="checkbox"/> <b>Contracting Services - 3</b> Contracting Services	0	● Active	Jeff Silverman

The screenshot shows a table of PowerForms with columns for Name, Responses, Status, and Sender. An actions menu is open for the 'Conference Registration - Eastern Region' form, displaying options: DOWNLOAD, Edit, View Envelopes, Copy Url, Deactivate, Change Sender, Delete, and EDIT. Green arrows point to the 'Deactivate' and 'Delete' options.

- **Delete** - to delete the PowerForm from the account; only the PowerForm is deleted
- **Deactivate** - to keep the PowerForm but deactivate it from use; the PowerForm

status changes to "Inactive"

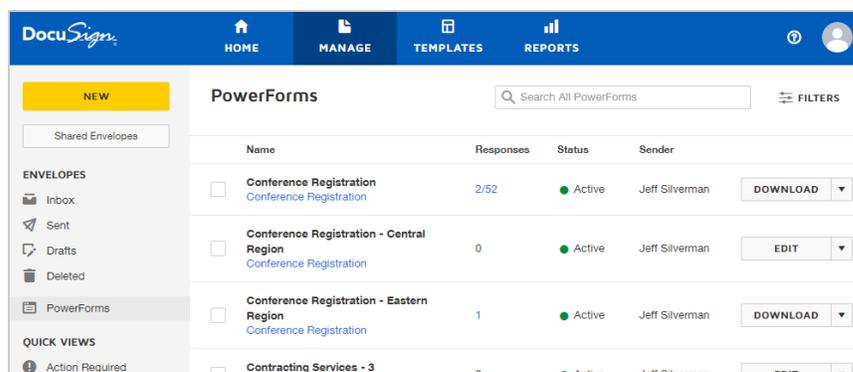


Name	Responses	Status	Sender
<input type="checkbox"/> <b>Conference Registration</b> Conference Registration - 2019	2/52	Inactive	Jeff Silverman

## To change the PowerForm sender

To be assigned as the PowerForm sender, the selected user must have the appropriate permission settings defined in their [Permission Profile](#). These settings must include the permission **Can send envelopes** and the PowerForm role of either **Standard User** or **Administrator**. Any user with the PowerForm Administrator role permission setting can change the sender to any other user in the account who has appropriate permission settings.

1. From the Manage page, select the **PowerForms** folder on the left to display all of your PowerForms.

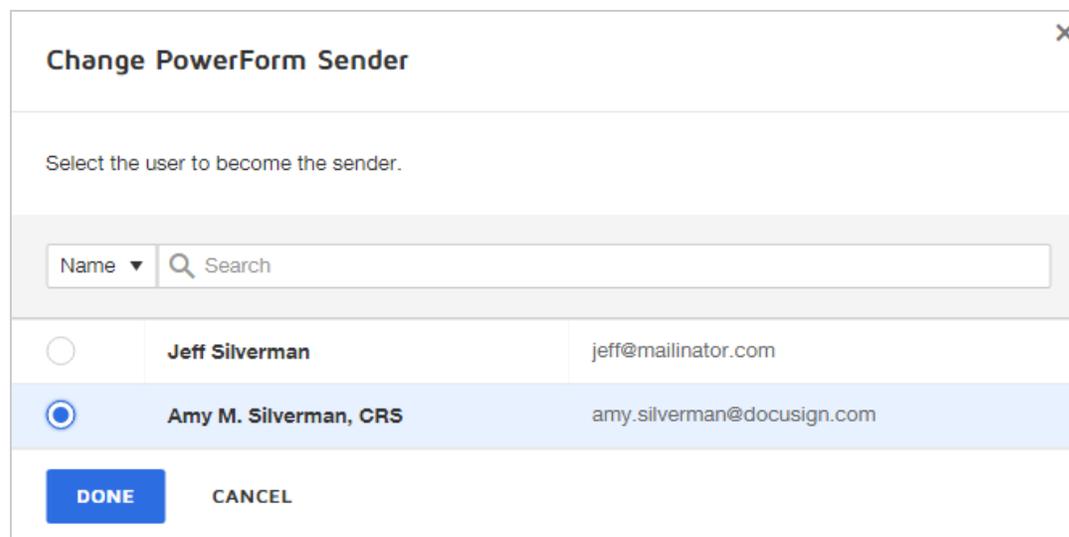


Name	Responses	Status	Sender
<input type="checkbox"/> <b>Conference Registration</b> Conference Registration	2/52	Active	Jeff Silverman
<input type="checkbox"/> <b>Conference Registration - Central Region</b> Conference Registration	0	Active	Jeff Silverman
<input type="checkbox"/> <b>Conference Registration - Eastern Region</b> Conference Registration	1	Active	Jeff Silverman
<input type="checkbox"/> <b>Contracting Services - 3</b>	0	Active	Jeff Silverman

2. Locate the PowerForm you want to edit by searching, filtering, or simply scanning the list.
3. Click the actions menu next to the PowerForm you want to modify and select **Change Sender**.

The Change PowerForm Sender dialog appears, listing all users on your account who have PowerForm permissions. The current sender is selected.

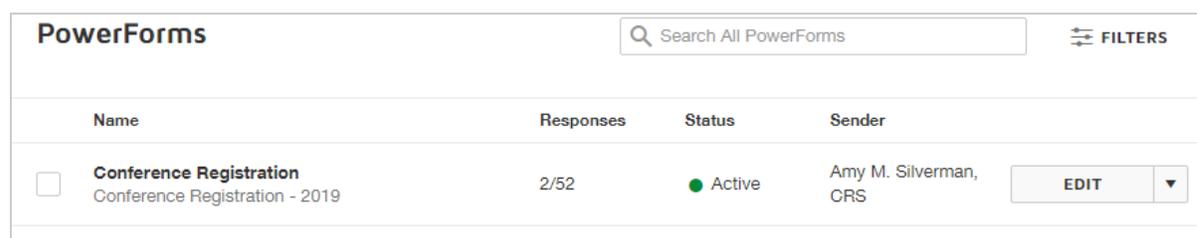
4. In the Change PowerForm Sender dialog, locate and select the new sender. Then click **DONE**.



The dialog box is titled "Change PowerForm Sender" and contains the instruction "Select the user to become the sender." Below this is a search bar with a "Name" dropdown and a "Search" input field. A table lists two users: Jeff Silverman (jeff@mailinator.com) and Amy M. Silverman, CRS (amy.silverman@docusign.com). The second user is selected with a radio button. At the bottom are "DONE" and "CANCEL" buttons.

Name	Search
<input type="radio"/>	Jeff Silverman jeff@mailinator.com
<input checked="" type="radio"/>	Amy M. Silverman, CRS amy.silverman@docusign.com

5. The PowerForm sender is updated and the new sender is listed on the PowerForms list.



The PowerForms list shows a table with columns: Name, Responses, Status, and Sender. A search bar "Search All PowerForms" and a "FILTERS" button are at the top right. The first entry is "Conference Registration" with 2/52 responses, Active status, and sender "Amy M. Silverman, CRS". An "EDIT" button is next to it.

Name	Responses	Status	Sender
<input type="checkbox"/> <b>Conference Registration</b> Conference Registration - 2019	2/52	● Active	Amy M. Silverman, CRS

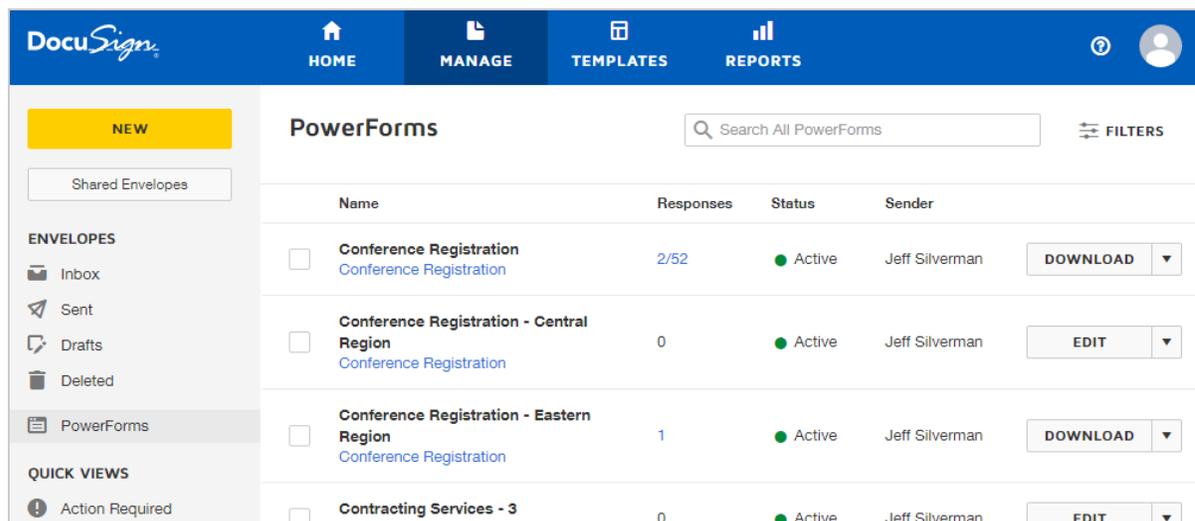
## Distribute a PowerForm

PowerForms are accessed through the unique URL generated when the form is created. You can distribute this URL directly to recipients by email, or you can embed the URL in a web page for recipients to access.

This procedure assumes you have already [created your PowerForm](#). The PowerForm must be active for recipients to access the form.

### To distribute a PowerForm URL

1. From the Manage page, select the **PowerForms** folder on the left to display all of your PowerForms.



The screenshot shows the DocuSign interface with the 'MANAGE' tab selected. The left sidebar shows the 'PowerForms' folder selected under 'ENVELOPES'. The main content area displays a table of PowerForms with columns for Name, Responses, Status, and Sender. Each row includes a checkbox, a 'DOWNLOAD' or 'EDIT' button, and a dropdown menu.

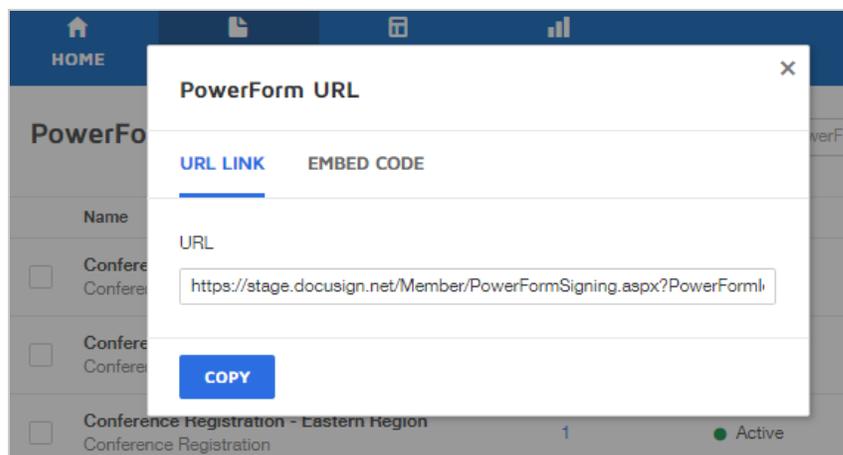
	Name	Responses	Status	Sender	
<input type="checkbox"/>	Conference Registration <a href="#">Conference Registration</a>	2/52	● Active	Jeff Silverman	DOWNLOAD ▾
<input type="checkbox"/>	Conference Registration - Central Region <a href="#">Conference Registration</a>	0	● Active	Jeff Silverman	EDIT ▾
<input type="checkbox"/>	Conference Registration - Eastern Region <a href="#">Conference Registration</a>	1	● Active	Jeff Silverman	DOWNLOAD ▾
<input type="checkbox"/>	Contracting Services - 3	0	● Active	Jeff Silverman	EDIT ▾

2. Locate the PowerForm you want to distribute by searching, filtering, or simply scanning the list.
3. Click the actions menu for the PowerForm and select **Copy URL**.

	Name	Responses	Status	Sender	
<input type="checkbox"/>	<b>Conference Registration</b> Conference Registration - 2019	3/52	● Active	Jeff Silverman	<b>DOWNLOAD</b> ▼
<input type="checkbox"/>	<b>Conference Registration - Central Region</b> Conference Registration	0	● Active	Jeff Silverman	Edit
<input type="checkbox"/>	<b>Conference Registration - Eastern Region</b> Conference Registration	1	● Active	Jeff Silverman	View Envelopes
<input type="checkbox"/>	<b>Contracting Services - 3</b> Contracting Services	0	● Inactive	Jeff Silverman	<b>Copy URL</b>
					Deactivate
					Change Sender
					Delete

4. In the PowerForm URL dialog, select one of the tabs and then click **COPY**.

- URL LINK - a link to the PowerForm landing page; paste the link into a browser or other location to use or record.
- EMBED CODE - an html <a> tag specifying a hyperlink with an href attribute, which indicates the link's destination of the PowerForm landing page.



The URL or embed code is copied to your clipboard and you can paste it into a browser or other location to use or record.

**See also:** [View PowerForm Responses](#)

## View PowerForm Responses

Once you [create](#) and [distribute](#) a PowerForm, if you are listed as the PowerForm sender, you can access the envelopes generated when a signer initiates a response to the form. PowerForm envelopes for which you are listed as the sender, appear in both your Manage page and the list of responses for an individual PowerForm.

From the PowerForms List, you can download the form data from the envelopes initiated from the PowerForm with you as the PowerForm sender. When you download the form data, you get a CSV file containing the data collected by the PowerForm for all of the envelopes for which you are the sender.

**Note:** PowerForm administrators can be granted additional permission rights to be able to view all envelopes for a PowerForm, even if they are not the PowerForm sender. See [Permission Sets guide](#) for more information.

If the PowerForm includes merge fields in the email subject, such as the recipient's name, this field data is added to the envelope title, making it easier to identify and locate specific responses.

### CONTENTS

[View PowerForm responses](#)

[View a count of responses](#)

[Download data from PowerForm responses](#)

## To view responses to a PowerForm

You can view the responses to a PowerForm that were generated with you as the PowerForm Sender. If you are a PowerForm administrator, you may be able to view all envelopes, depending on your user permissions.

1. From the Manage page, select the **PowerForms** folder, then select the PowerForm you want to view.

Name	Responses	Status	Sender	
<input type="checkbox"/> Conference Registration <a href="#">Conference Registration</a>	2/52	Active	Jeff Silverman	DOWNLOAD ▾
<input type="checkbox"/> Conference Registration - Central Region <a href="#">Conference Registration</a>	0	Active	Jeff Silverman	EDIT ▾
<input type="checkbox"/> Conference Registration - Eastern Region <a href="#">Conference Registration</a>	1	Active	Jeff Silverman	DOWNLOAD ▾
<input type="checkbox"/> Contracting Services - 3	0	Active	Jeff Silverman	EDIT ▾

2. In the PowerForm envelope list, you see all the responses initiated from the PowerForm for which you are the sender:

Monterey Conference Online Registration ⓘ		Search PowerForm	FILTERS
Filtered by: Date (Last 6 Months)   <a href="#">Edit</a>			
<input type="checkbox"/>	<b>Please DocuSign: Conference Registration.docx</b> To: Mike Marsh, Mikka Brown	✓ <b>Completed</b> Last change on Jun 13, 2017   11:03	MOVE ▾
<input type="checkbox"/>	<b>Please DocuSign: Conference Registration.docx</b> To: Dennis Quark, Mike Marsh	✓ <b>Completed</b> Last change on Jun 13, 2017   11:03	MOVE ▾

If you are a PowerForm administrator, you may be able to view all responses, regardless of who was the PowerForm sender.

3. Click on a response to view the envelope details.

### To view a count of responses for a PowerForm

1. From the Manage page, select the **PowerForms** folder, then locate the PowerForm you want to review.
2. In the PowerForms list, you can see the count of total responses received under all senders. If the PowerForm is set up with a maximum number of responses, the count is represented as **n/maximum#**. In this example for the Conference Registration PowerForm, three responses have been received out of a total maximum number of 52.

PowerForms		Search All PowerForms	FILTERS
Name	Responses	Status	Sender
<input type="checkbox"/> <b>Conference Registration</b> Conference Registration - 2019	3/52	● Active	Jeff Silverman
<input type="checkbox"/> <b>Conference Registration - Central Region</b> Conference Registration	2	● Active	Jessica Smythe

## To download data from PowerForm envelopes

You can download data from the responses to a PowerForm that were generated with you as the PowerForm Sender. If you are a PowerForm administrator, you may be able to download data from all envelopes, depending on your user permissions.

1. From the Manage page, select the **PowerForms** folder.
2. In the PowerForms list, locate the PowerForm for which you want to download data and click **DOWNLOAD**.

PowerForms				Search All PowerForms	FILTERS
Name	Responses	Status	Sender		
<input type="checkbox"/> Conference Registration Conference Registration - 2019	3/52	● Active	Jeff Silverman	<b>DOWNLOAD</b> ▼	
<input type="checkbox"/> Conference Registration - Central Region Conference Registration	2	● Active	Jessica Smythe	<b>EDIT</b> ▼	

3. In the Download PowerForm Data date picker, adjust the date range for the download. By default, the range is set to the current day only.

### Download PowerForm Data

Start Date: 07/01/2016

End Date: 09/27/2016

**DOWNLOAD** CANCEL

#### 4. Click **DOWNLOAD**.

The form data for all envelopes that fall within the specified date range is exported to a CSV file and saved to your local Downloads folder.

## Embed a PowerForm in a Web Page

You can use the URL for a PowerForm to embed the form into a web page as a link. You can get the URL for PowerForm as described in [Distribute a PowerForm](#).

If the web page gathers information about the user who will use the PowerForm link, you can add that information to the link, such that it pre-populates fields in the PowerForm. For example, if your page collects the user's email address and the PowerForm Role Name is Signer1 you can add the call for the email address to the URL link to pre-populate the email address. **Example:** Signer1\_Email=Server.UrlEncode(this.customerEmailText.Text)

You can also customize the PowerForm URL to pre-populate information into the form. For more information, see [Populate Custom Document Fields in a Web PowerForm](#).

**Note:** iFrames should not be used for embedded operations on mobile devices due to screen space issues. For iOS devices DocuSign recommends using a WebView.

### Example: Embed a PowerForm in an iFrame

The HTML example below shows how to embed a web PowerForm into an iFrame. This format maintains a website's design around the PowerForm.

```
<html>
  <head>
    <title>IFrame PowerForm Sample</title>
    <style type="text/css">
      body { background-color: #fefdfc;}
      p.description { width: 500px; border: 1px solid
#cfc; padding: 20px; }
      .form_cont { border: 1px solid #cfc; padding:
20px; width: 1024px; background-color: #cd9;}
      .top_cont { width: 1124px; margin-left: auto;
margin-right: auto; }
      #dswpf { width: 1024px; height: 700px;}
    </style>
  </head>

  <body>
    <div class="top_cont">
      <p class="description">This page embeds a
DocuSign Web PowerForm into an HTML iframe.

      This allows a website's branding and design to
be retained while a user fills out
      and signs a form.</p>
      <div class="form_cont">
        <iframe id="dswpf"
src="https://demo.docusign.net/MEMBER/PowerFormSigning
.aspx?PowerFormId=
          8968380d-16da-447c-97d7-
```

```
fa989ed11082&Signer%201_UserName=James%20Smith"/>
    </div>
</div>
</body>
</html>
```

## Populate Custom Document Fields in a Web PowerForm

When using a URL for a Web PowerForm, you can customize the URL to pre-populate information into the PowerForm. This can make the signing process easier for the recipient, and is useful if you know your recipient's identity, or you want to specify an envelope custom field or field values in advance.

You add custom document fields to your PowerForm URL as parameters, separated by an ampersand (&) symbol. The first parameter is also preceded by an ampersand.

You can add the following parameters to the URL:

- **Recipient Name:** To populate the recipient's name in the Web PowerForm, add the following text in the URL:

```
<RoleName>_UserName=<value>
```

Where *<RoleName>* is the recipient role in the PowerForm and the *<value>* is the name of the recipient.

Example: Signer1\_UserName=John Smith

- **Recipient Email:** To populate the recipient's email address in the Web PowerForm, add the following text in the URL:

```
<RoleName>_Email=<value>
```

Where *<RoleName>* is the recipient role in the PowerForm and the *<value>* is the email address of the recipient.

Example: Signer1\_Email=John.Smith@yahoo.com

- **Envelope Field:** To populate an envelope field in the Web PowerForm, add the following text in the URL:

EnvelopeField\_*<EnvelopeFieldName>*=*<value>*

Where *<EnvelopeFieldName>* is the name of the envelope field in the Web PowerForm and the *<value>* is the value you want in the field.

Example: EnvelopeField\_Region=Northwest

- **Field:** To populate the field information in the Web PowerForm, add the following text in the URL:

*<SecureFieldName>*=*<value>*

Where *<SecureFieldName>* is the name (Label) of the field in the Web PowerForm and the *<value>* is the value you want in the field.

Example: State=Alaska

If a document has two or more fields with the same name, but for different roles in the document, add the role name before the field name as follows:

*<RoleName>*\_*<SecureFieldName>*=*<value>*

Example: Signer1\_State=Alaska

A check box can be set as selected by setting the value to x.

Example: checkbox1=x

- **Activate Only Flag:** An activate only flag can be appended to the PowerForm URL. When the flag is active, an email is sent to the first recipient with a link that initiates the signing session without requiring the signer to enter an emailed access code, which is the case when the flag is not enabled. It is important to note that using this flag still provides the same level of signer authentication without the burden of entering an access code from an email, since in either case the signer still has to access their email to initiate signing.

The activate only flag is not applicable to Direct PowerForms, since emails are not sent to initiate a signing session.

To enable the activate only flag, add the following text in the URL:

*activateonly=1*

- **Persist Original Flag:** A persist original flag can be appended to the PowerForm URL. When the flag is active, the data originally entered in fields by the sender remains in the fields when the envelope is reassigned to another signer. If the flag is not active, the data is not included in the fields. To enable the persist original flag, add the following text in the URL:

*persistoriginal=1*

## Examples of Pre-populating Information

### **Example — Add recipient name and email**

For Role Name = Customer , recipient name = David Jones, recipient email = David.Jones\_ds@yahoo.com, you customize the PowerForm URL as follows:

```
https://  
{server}/MEMBER/PowerFormSigning?PowerFormId=0b4851b6-  
b52a-462f-b3fd-27a4b130eaac&Customer_  
UserName=David%20Jones&Customer_Email=David.Jones_  
ds@yahoo.com
```

### **Example — Add activate only, recipient name (Role Name = Tax Filer), and two fields (Address and Phone)**

```
https://{server}/MEMBER/PowerFormSigning?  
PowerFormId=1ed83228-6b44-4f8b-a147-
```

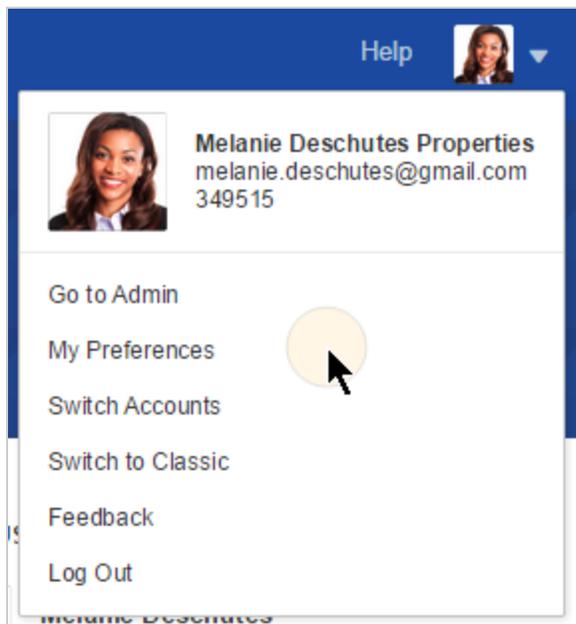
52c5ae22c381&activateonly=1&Tax%20Filer\_  
UserName=Howard%20I.%20Getz&Address=172%20East%20161%20  
StreetBronx%2CNew%20York%2CNew%20York%2C10451&Phone=55  
5-555-1212

# Preferences

You can control many aspects of your DocuSign account, from changing your email address and signature style, to managing your contacts list. This section describes the various personal preferences settings and how to set or change them, including:

- [Create Your Signature](#)
- [Change Your Email Address](#)
- [Change Your Name](#)
- [Change Your Password](#)
- [Manage Contacts](#)
- [Manage Notifications](#)

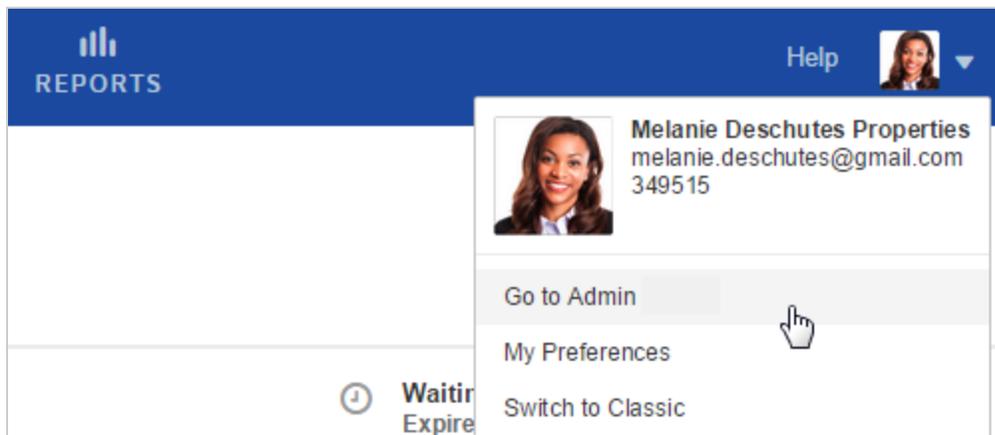
To access your personal preferences page, in the top navigation bar, click the account settings drop-down, and select **My Preferences**.



## Administer your account using DocuSign Admin

In addition to your personal preferences, you can manage other aspects of your account using **DocuSign Admin**: set reminder and expiration and other defaults for the documents you send; review billing information for your account; for multi-user accounts, manage user and permission settings.

From your DocuSign account, select the **Go to Admin** link in the account settings dropdown menu.



You can also access DocuSign Admin directly by going to the administrator log in page and entering your credentials: <https://admin.docusign.com>

For more information on using DocuSign Admin, visit our [Support site](#).

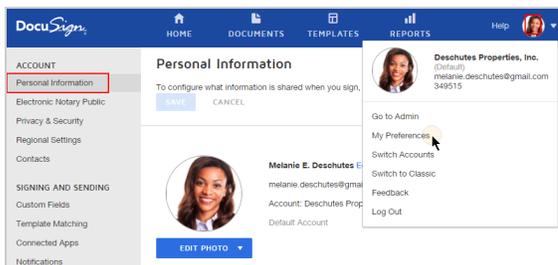
## Manage Your Identity

Managing your DocuSign identity is about maintaining your profile and account information and deciding what you want to share with other DocuSign users.

The Personal Information preferences give you control over your personal DocuSign identity. You can add and update your personal information and choose what information to share with other DocuSign users through your privacy settings.

Email notifications to document recipients include your profile image, name, company name, and email address. The full ID card appears when your document recipients hover over your signature in a document that you have signed.

To manage your identity, go to **My Preferences > ACCOUNT > Personal Information**.



The key tasks for these preferences are:

- **Upload a profile image.** Add a photo to customize your account. If you share your identity with other users, your photo is included on email notifications, helping your document recipients feel more confident with their signing experience. The maximum and recommended image size to upload is 79x79 pixels.
- **Change your name.** If you need to correct or change your name on your account, click the **Edit** link. [Read more...](#)
- **Manage Privacy Settings.** Privacy settings control what information you share with other DocuSign users. Click the **Privacy & Security** link and select the information you want to share.
- **Change your company name.** You can edit your company name on your account from the Company field. [Read more...](#)
- **Manage your signature.** Want a different style for your signature? Click the **Edit** link next to your saved signature and pick your new look. Or get fancy and draw your own signature or upload an image. [Read more...](#) You can also use the + **Add New** link to add new names and signatures to your account, allowing people to send you documents for signature using the additional names you specify.
- **Change your email address.** Your account email address is used to log in to DocuSign and receive documents to sign. To enter a new email address for your DocuSign account, click the **Edit** link. Once you change and verify your new email address, it is linked to your DocuSign account and all of your sent and received documents.

- **Update your contact information.** Keep your company name, title, address, and phone and fax information up to date. Use your privacy settings to control which details you share with other users.

## Change Your Name

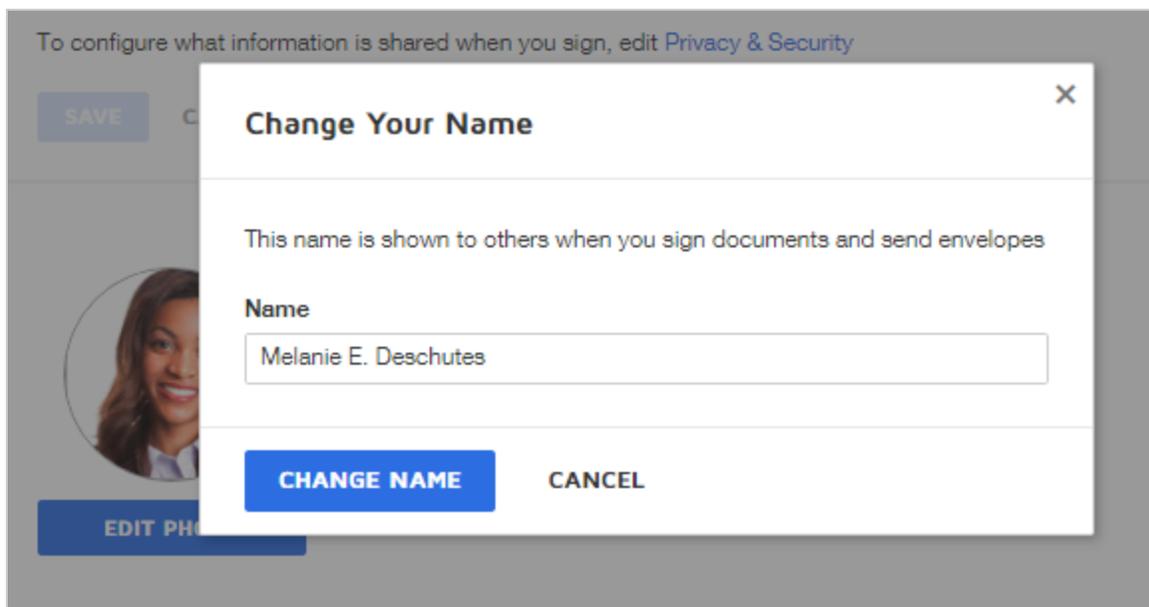
A key part of your DocuSign identity is your name. Your name appears on your ID Card and is included on the email notifications sent to your recipients. (You can see examples of what your recipients see in [The Signing Experience](#).)

If the name on your account is not correct, or you've changed your name and want to update your account, it's easy to do so from the Personal Information preferences.

**Note:** If you do not see the option to edit your name as described in this guide, check with your DocuSign account administrator. Your administrator can restrict account members from changing their name in the DocuSign application.

### To change your name

1. Go to **My Preferences > Account > Personal Information**.
2. Your current name is shown next to your profile image. Click **Edit** to change your name.
3. In the Change Your Name dialog, modify your name as desired.
4. Click **CHANGE NAME**.



5. Your name is updated and the changes apply to all future envelopes and notifications.

## Change Your Email Address

Along with your name, your email address is a key part of your DocuSign identity. You use your email address to log in to your account, and receive documents to sign from others.

If the email address on your account is not correct, or you are using a different email address and want to update your account, it's easy to do so from the Personal Information preferences.

### CONTENTS

[How to change your email address](#)

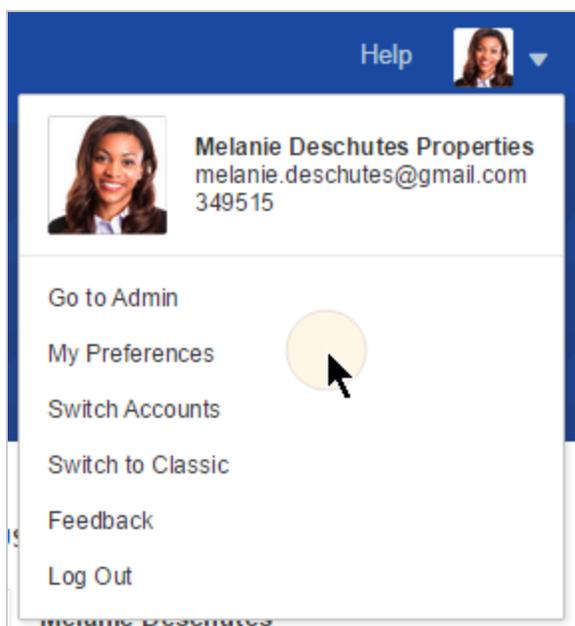
What happens to your envelopes when you change your email address

How are signing groups you belong to affected when you change your email address?

Troubleshooting tips

## To change your email address

1. Go to **My Preferences**.



2. Select **Account > Personal Information**. Your current email address is shown next to your profile image.

## Personal Information

To configure what information is shared when you sign, edit [Privacy & Security](#)



**Melanie Deschutes, CPM** [Edit](#)  
melanie.deschutes@gmail.com [Edit](#)  
Account: Melanie Deschutes Properties

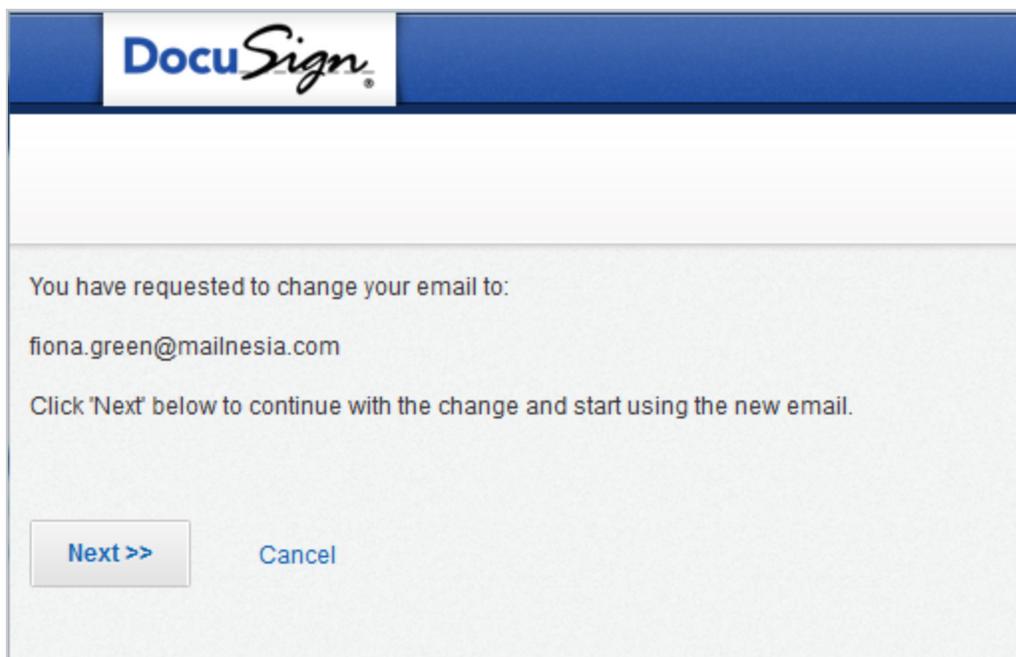
3. Click **Edit** to change your email address.
4. In the Change Account Email Address dialog, modify your address as required.
5. Click **CHANGE EMAIL**.

A message is sent to your old email address informing you about the change of email request. Another message is sent to your new email address with a link for you to confirm the change.

6. Log out of your DocuSign account.

**Note:** You must log out before you confirm the email change.

7. At the new email address, in the confirm message, click the **CONFIRM** link.
8. A DocuSign web page appears confirming your request to change your email address - click **Next >>>**



Once you confirm the change, your email is updated and the changes apply to all future envelopes and notifications.

9. Log in to DocuSign with your new email address and your existing password.  
Your new email address appears in your Personal Information preferences.

## What happens to your envelopes when you change your email address?

Changing your email address does not modify any envelopes currently in your account. You can still access all envelopes that were previously sent and received at the old email address. Notifications for new envelopes which you send, are sent to the new email address.

In order to receive new envelopes at your new email address that are sent from other senders, be sure to instruct them to use your new email address. If they send envelopes to

your old email address, provided you have access to the email account, you can still view and sign them. But since your account now uses a new email address, those envelopes will not appear in your account.

## How are the signing groups you belong to affected when you change your email address?

A [signing group](#) is a predefined group of recipients and any one member of the group can sign documents sent to the group. If you are a member of any signing groups and you change your email address, your account administrator must update the signing group to use your new email address. Otherwise, any email notifications sent to the group will continue to go to your old email address, and the envelopes will not appear in your DocuSign account. Administrators can refer to [this topic](#) for information on setting up and managing signing groups.

## Troubleshooting tips

### **Why doesn't the email address change go through?**

When changing your DocuSign email address, take care to follow the steps carefully. If the change does not seem to go through, it's most likely because you still had your account session open when you confirmed the email address change. **Note Step 6**, instructing you to log out of your DocuSign account before you confirm the address change.

### **Why do I get an error when I try and change my email address?**

If you get an error telling you the change did not go through and to try again, then most likely this is because the new address you are trying to use is already in use on another DocuSign account. To resolve this error, enter a different email address or contact

DocuSign Customer Support for assistance. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## Create Your Signature

Customize your account by creating your signature. You can edit or delete an existing signature, or add a new one. When you change or add your signature, you can choose one of the preformatted styles, upload image files, or draw your signature directly.

While you can save multiple signatures, you cannot select which to use when you sign. Generally, it's best to have just one saved signature. If you have multiple signatures, when you sign a document, the saved signature matching the name on your account is used.

**Note:** To upload or draw your signature, you must apply both the signature and initials. You cannot upload or draw just one of these elements.

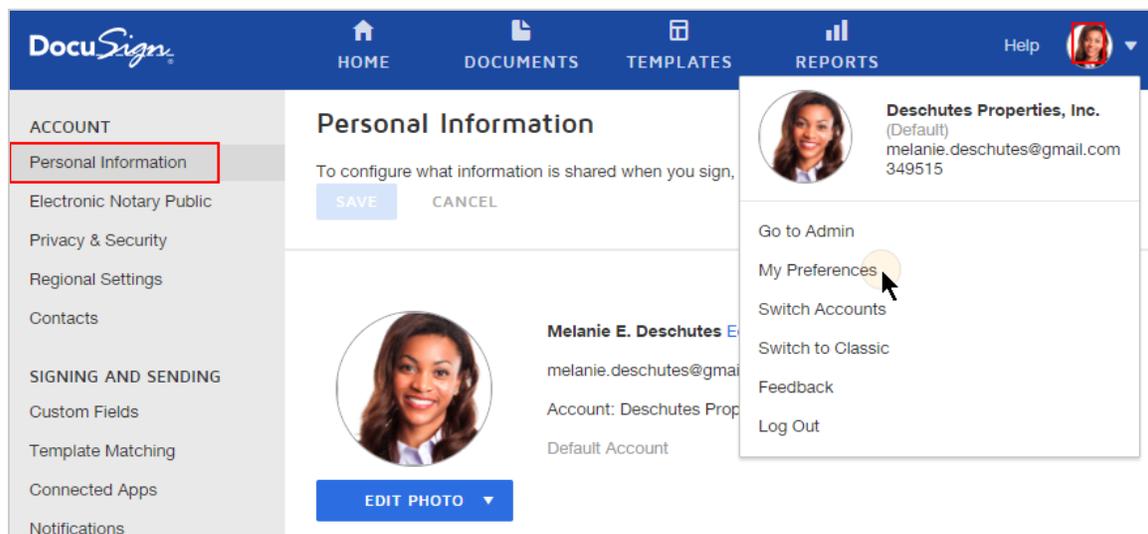
To upload a signature or initials image, the image height should be 145 pixels. The width of the image can vary depending on the length of the person's name. The maximum width for signatures is 400 pixels and 150 pixels for initials. The maximum file size is 200 kb. The format of your image file can be any of the common image file types, including jpg, png, tiff.

Drawing your signature and initials freehand works best if you have a stylus. But you can also use your mouse pointer or even your finger if you have a touch screen device.

**Tip:** You can use the DocuSign mobile app on a tablet or other mobile device to draw your signature using a stylus or just your finger. This is an easy way to capture your own unique signature and use it to DocuSign.

## To create a signature

1. Go to **My Preferences > Account > Personal Information**.



2. Scroll down to the **Signatures** section and either **Edit** an existing signature or **Add New** signature.
3. In the Create Your Signature dialog, enter your name and initials exactly as you wish to sign, and do one of the following. For both Draw and Upload options, you must provide both your signature and your initials.
  - **Choose** - select any of the preformatted signature styles.
  - **Draw** - create a freehand drawing of your signature and initials.

- **Upload** - upload your own signature and initials image files.

## Create Your Signature

Full Name M. R. Deschutes      Initials MD

**CHOOSE**    **DRAW**    **UPLOAD**

  
**UPLOAD SIGNATURE**

  
**UPLOAD INITIALS**

Accepted File Formats: GIF, JPG, PNG, BMP. Max file size 200KB.

By clicking Create, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

**CREATE**    CANCEL

4. Click **Create** to accept the new signature and initials style.

## Add the REALTOR Logo to Your Signature

If you have a DocuSign for REALTOR or DocuSign for REALTOR PLUS plan, you can use your National Association of Realtors membership to add the REALTOR® logo to your DocuSign signature. The REALTOR® membership mark helps identify you as a member of the National Association of REALTORS®.

You can add the logo to any saved or new signature, using either one of the pre-drawn styles, your own drawn version, or an uploaded image.

### CONTENTS

[Add the REALTOR® logo to your signature](#)

[Remove the REALTOR® logo from your signature](#)

**Note:** This feature is only available for DocuSign for Realtor PLUS plans.

For more information on adding a signature, [see this Help topic](#).

### To add the REALTOR® logo to your signature

1. Go to **My Preferences > Account > Personal Information**, and scroll down to the **Signatures** section.
2. To edit an existing signature and add the logo:
  - a. Click **Edit**.
  - b. Click **Add the REALTOR® logo to my signature**.

### Create Your Signature

Full Name	Melanie Deschutes	Initials	MD	<a href="#">Add the REALTOR® logo to my signature</a>
-----------	-------------------	----------	----	---

[CHOOSE](#)   [DRAW](#)   [UPLOAD](#)

c. Enter your NRDS ID and the Last Name for the ID, and click **Validate**.

### Validate NAR Membership

Please validate your NAR membership to add the REALTOR® logo to your signature.

Last Name:

NRDS ID:

[VALIDATE](#)   [CANCEL](#)

If your credentials are valid, the logo is added to your signature and initials:



## To remove the REALTOR® logo from your signature

1. Go to **My Preferences > Account > Personal Information**, and scroll down to the **Signatures** section.
2. To edit an existing signature and add the logo:
  - a. Click **Edit**.
  - b. Click **Remove the REALTOR® logo from my signature**.
  - c. Click **Create**.

Your signature and initials are updated, removing the logo.

## Change Your Company Name

There are two company names associated with your account:

- **Company name** - this is a unique value for your DocuSign user ID. The company name appears on your ID Card and is shown to other DocuSign users, depending on your Privacy Settings.
- **Account name** - this is a global value for every user on your DocuSign account. The account name appears in notification emails to your recipients. This value can only be changed by your account administrator. [Learn more...](#)

**EXAMPLE — Company and Account Names**

If you work in a small business, you'll likely use the same value for both names. So, for example, your company name and account name would both be "Express Tire & Automotive".

But what if you work for a large, global corporation. The account is owned by your corporate parent company, and you work for a subsidiary. So your account name might be "Hargrave International, Inc." and your company name is that of your subsidiary, "Western Supplies, Inc."

**To change your company name**

1. Go to **My Preferences > Account > Personal Information**.
2. Under Job Title and Company, edit the value in the Company field as desired.  
Your change is saved automatically.



**Company and Job Title**

Company  
Deschutes Property Management

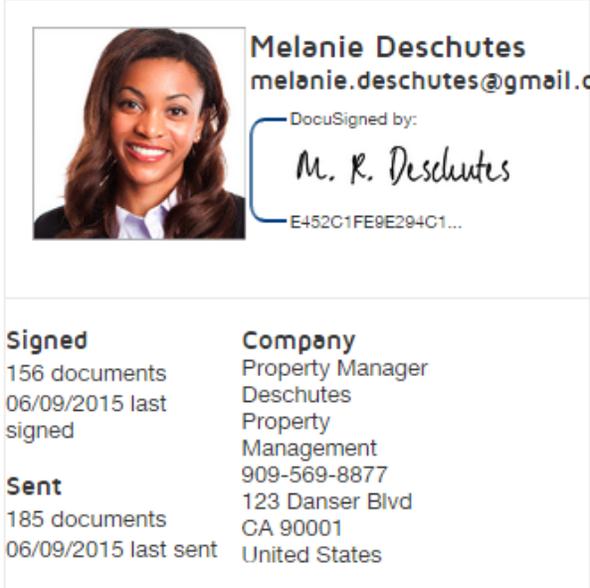
Job Title  
Property Manager

3. To verify the change, click **Privacy and Security** to view your full ID card.
4. Under Display these items on my ID card, select **Company and title**.

Your company name is shown on your ID Card.

### DocuSign ID Card

This is what other DocuSign users will be able to see. To edit, see [Personal Information](#)



**Melanie Deschutes**  
melanie.deschutes@gmail.com

DocuSigned by:  
*M. R. Deschutes*  
E452C1FE8E294C1...

<b>Signed</b>	<b>Company</b>
156 documents	Property Manager
06/09/2015 last signed	Deschutes
	Property Management
	909-569-8877
<b>Sent</b>	123 Danser Blvd
185 documents	CA 90001
06/09/2015 last sent	United States

#### ID Card Privacy Settings

Show my ID card to other DocuSign users

#### Display these items on my ID card

Company and title

Address and phone number

Usage history

## Change Your Account Name

There are two company names associated with your account:

- **Account name** - this is a global value for every user on your DocuSign account. The account name appears in notification emails to your recipients. This value can only be changed by your account administrator.
- **Company name** - this is a unique value for your DocuSign user ID. The company name appears on your ID Card and is shown to other DocuSign users, depending on your Pri-

vacy Settings. Users can [change their company name](#) through their personal preferences.

**EXAMPLE — Company and Account Names**

If you work in a small business, you'll likely use the same value for both names. So, for example, your company name and account name would both be "Express Tire & Automotive".

But what if you work for a large, global corporation. The account is owned by your corporate parent company, and you work for a subsidiary. So your account name might be "Hargrave International, Inc." and your company name is that of your subsidiary, "Western Supplies, Inc."

To change your account name (administrators)

1. Log in as an account administrator and go to **My Preferences > Account > Personal Information**.
2. The account name is displayed next to your profile image.

## Personal Information

To configure what information is shared when you sign, edit [Privacy & Security](#)



**Melanie Deschutes, CPM** [Edit](#)  
melanie.deschutes@gmail.com [Edit](#)  
**Account: Melanie Deschutes, Inc.** [Edit](#)

3. Click **Edit** next to your account name.
4. Enter your new account name and click **CHANGE NAME**.

### Change Your Account Name ✕

Please Note: Account Name appears on email notifications, documents and envelopes sent from this account. It is also displayed when switching between multiple accounts.

**Account Name**

Your account name is changed and the new name is reflected in your Personal Information and on all future email notifications.

## Change Your Password

You can change your password at any time. Change your password periodically, ideally at least every six months. If you think someone else has gained access to your password, change it immediately. When you change your password, you cannot reuse any of your previous 12 passwords.

### CONTENTS

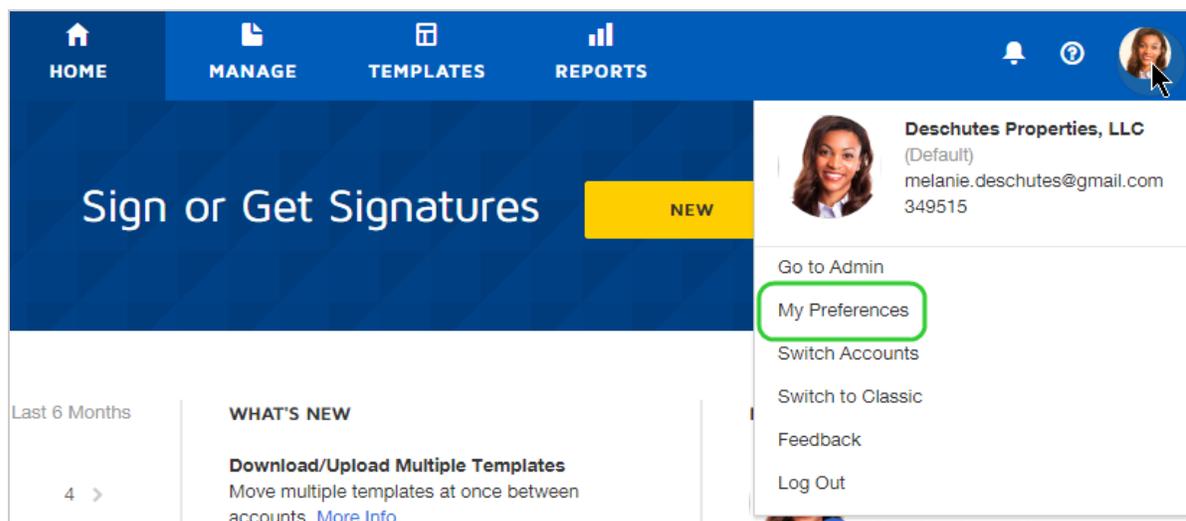
[How to change your password](#)

[Reset a forgotten password](#)

[Video: Reset your password](#)

To change your password or security question

1. Go to **My Preferences**.



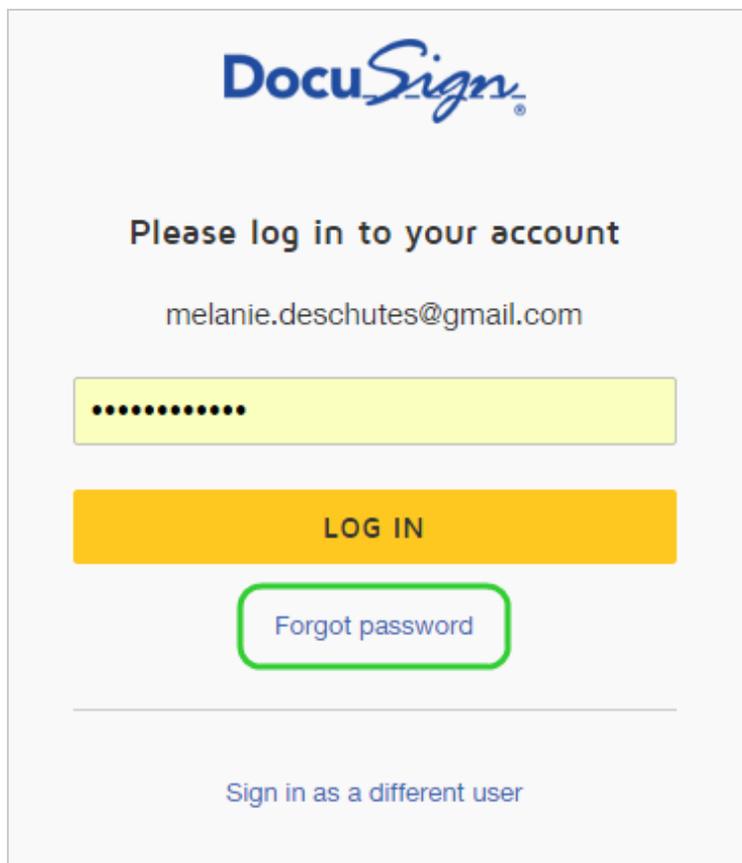
2. In the left-hand menu, select **Privacy & Security**.

3. Click **CHANGE MY PASSWORD**.
4. If required, log in to your account to authenticate.
5. Complete the Password form: enter and verify a new password, and provide password questions and answers.
6. Click **SAVE**.  
Your password is changed.

### Forgot your password?

We all forget our passwords from time to time. If you set a security question, DocuSign can use it to confirm your identity and help you recover your password. Options for resetting a password are:

- From the login page, click the **Forgot password** link and follow the directions to reset your password.



The image shows a DocuSign login interface. At the top is the DocuSign logo. Below it is the text "Please log in to your account" followed by the email address "melanie.deschutes@gmail.com". There is a password field with a yellow background and a masked password of ten dots. Below the password field is a yellow "LOG IN" button. Underneath the button is a green-bordered button labeled "Forgot password". At the bottom of the form is a horizontal line and the text "Sign in as a different user".

- Contact your DocuSign administrator and ask them to reset your password for you. See the [Manage Users](#) guide for more information.

## Reset Password Video

Forgot your password? Here's a short video on how to reset your password:

[Click here to watch video](#)

## Two-Step Verification

Two-step verification is a standard security feature aimed at protecting your data. This feature protects your account by requiring two pieces of verification before you can access DocuSign. By default, all users are protected by their password. But with two-step verification, you must know something (your password) and you must have something (access to your phone) in order to log in. If your password is compromised, this second layer of protection prevents a malicious user from accessing your account.

This security feature is available for both the New DocuSign Experience and the Classic DocuSign Experience, and is also supported by most DocuSign apps, including our mobile apps and integrations such as DocuSign for SharePoint.

### CONTENTS

[How to setup two-step verification](#)

[How to log in with two-step verification](#)

[How to turn off two-step verification](#)

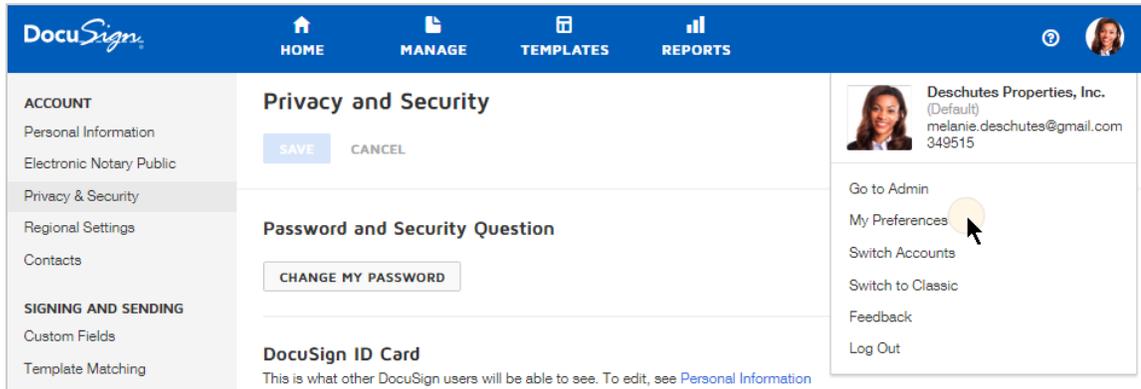
[Use an Authenticator app for two-step verification](#)

[Verified security information: use and best practices](#)

**IMPORTANT:** Some third-party apps may not yet support this feature. If you enable two-step verification, you will not be able to use those apps to access DocuSign. DocuSign does this to ensure all access to your account, even from other apps, uses strong authentication methods to access your data. For assistance, please contact the third-party application developer.

## To set up two-step verification

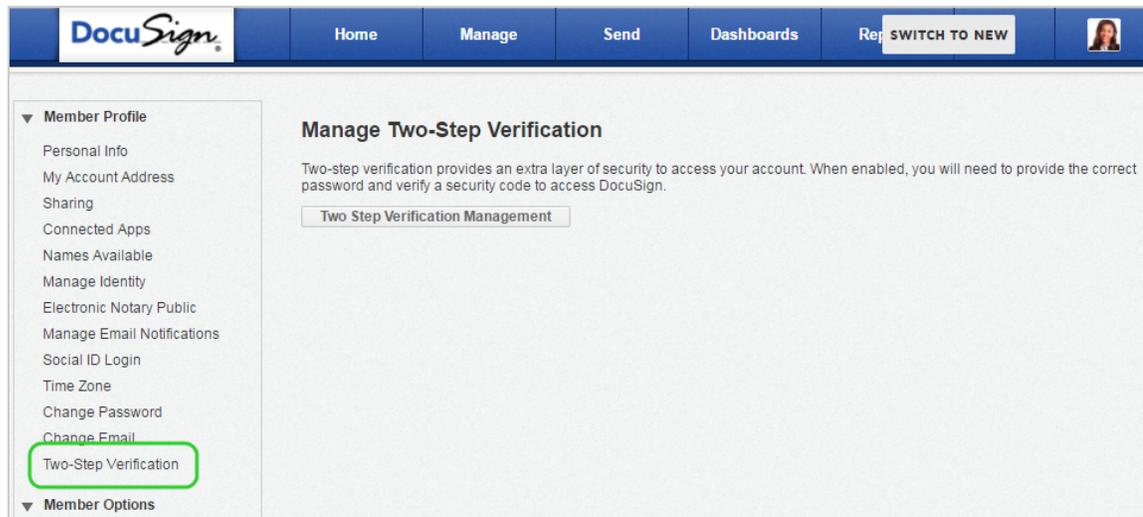
1. If you are using the New DocuSign Experience:
  - a. Go to **My Preferences > Privacy & Security**.



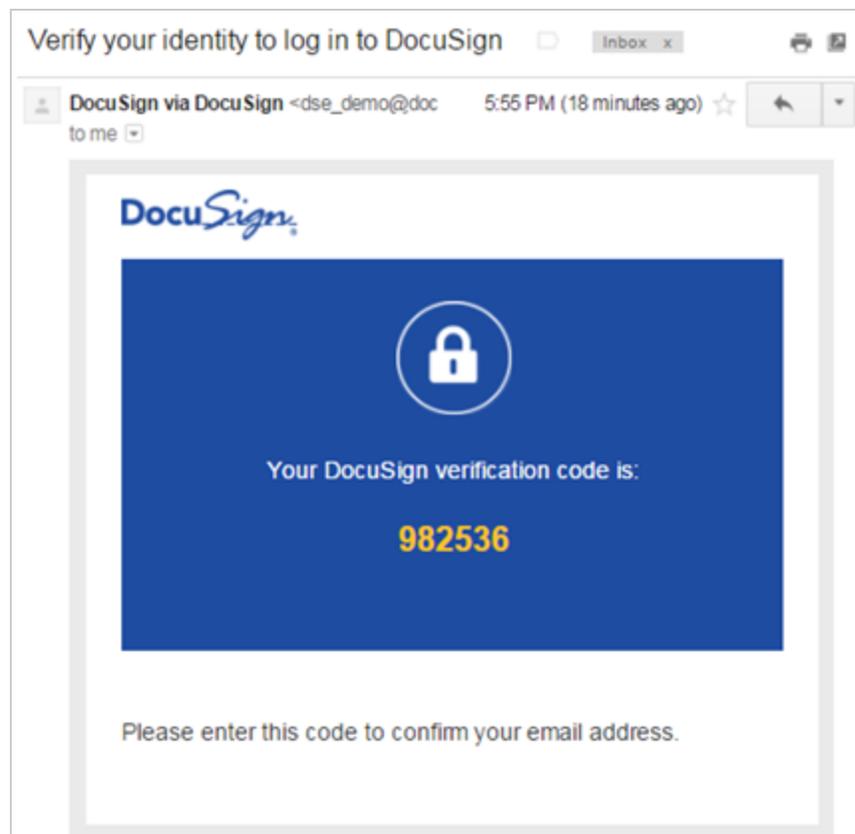
- b. Scroll down to the Two-Step Verification section and click **MANAGE TWO-STEP VERIFICATION**.



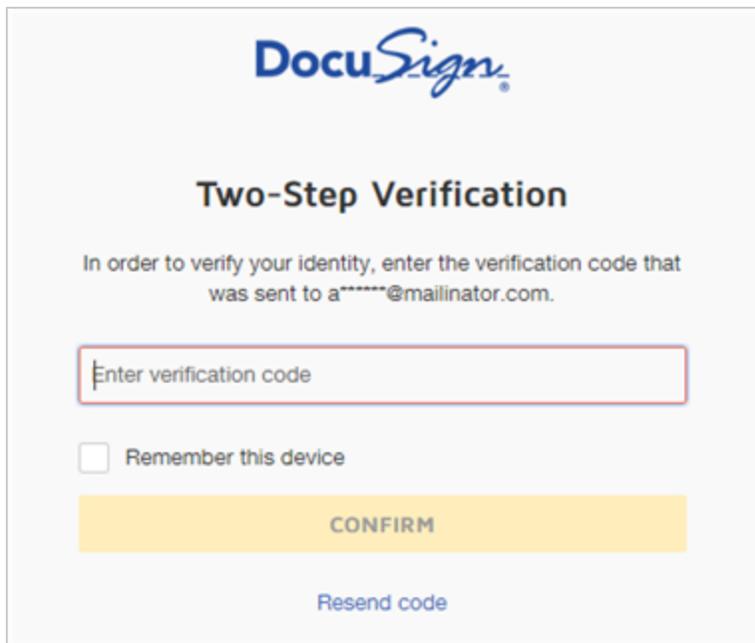
2. If you are using the Classic DocuSign Experience:
  - a. Go to **Preferences > Member Profile > Two-Step Verification**.



- b. Click **Two Step Verification Management**.
3. Follow the onscreen prompts to log in to your DocuSign account to start the verification process.
4. Check your email for a verification code from DocuSign.



5. Enter the verification code in the box provided.



The image shows a DocuSign Two-Step Verification screen. At the top is the DocuSign logo. Below it is the title "Two-Step Verification". The instructions read: "In order to verify your identity, enter the verification code that was sent to a\*\*\*\*\*@mailinator.com." There is a text input field with the placeholder text "Enter verification code". Below the input field is a checkbox labeled "Remember this device". At the bottom of the form is a yellow button labeled "CONFIRM" and a blue link labeled "Resend code".

6. Click **CONFIRM**.
7. The My Settings page appears with your email address in the Verified Security Information section.

The screenshot shows the 'My Settings' page for Amy Lyon (NA3-EU1). The page is titled 'DocuSign My Settings' and has a 'Log Out' link. The main section is 'Two-Step Verification', which includes a toggle switch that is currently off, with the text 'Two-step verification is off'. Below this is a section for 'Verified Security Information' with an email icon and the text 'Email amylyon@mailinator.com'. There is a blue button labeled 'ADD SECURITY INFORMATION'. The next section is 'Trusted Devices' with a description and a button labeled 'REVOKE ALL'. At the bottom, there are links for 'Help', 'Terms', 'Intellectual Property', and 'Privacy Policy', along with a copyright notice for 2017 DocuSign, Inc.

8. Click the **Two-step verification** toggle.
9. In the Additional Security Information Required dialog, click **ADD SECURITY INFORMATION** to add a second authentication method and enable two-step verification for your account.
10. Click **ADD** to select one of the three authentication methods offered. DocuSign recommends you add a verified phone number.

### Add Security Information

Add security information which can be used as a second method for authentication



#### Verified Phone

Add a verified phone number.

ADD



#### Authenticator App

Set up an authenticator app on your mobile device.

ADD



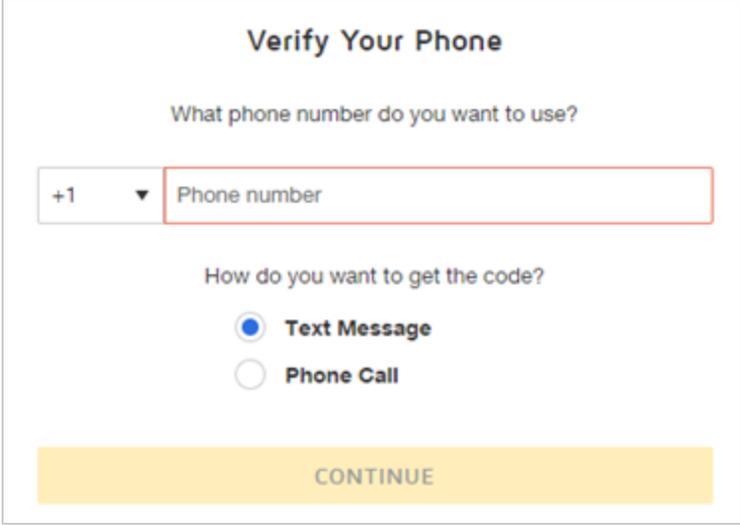
#### Email

Add a backup email in case you cannot access your primary email

ADD

CANCEL

11. Follow the guided setup to verify and add your selected method.
  - **Phone.** You can receive the verification code by either text message or a phone call.



**Verify Your Phone**

What phone number do you want to use?

+1 ▼ Phone number

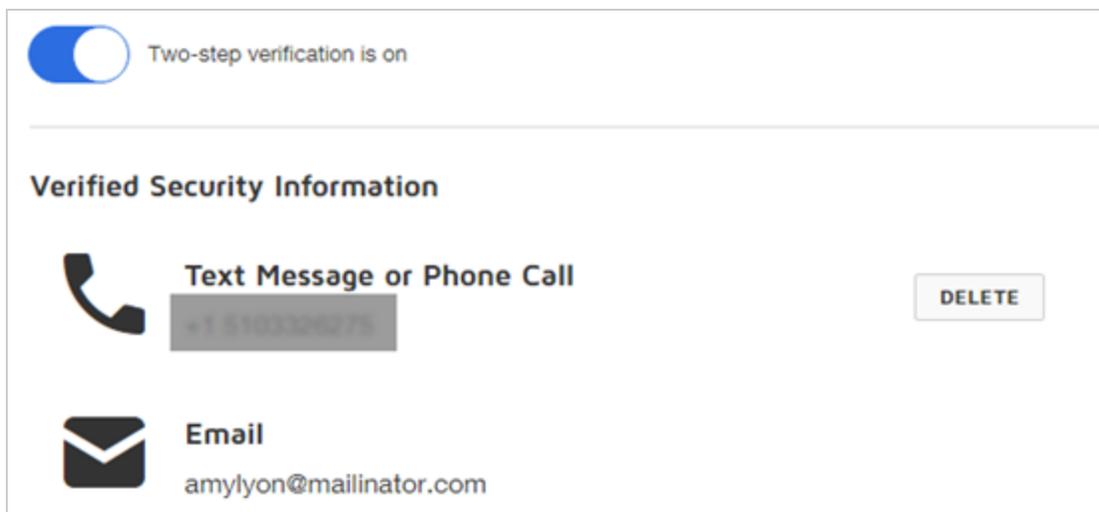
How do you want to get the code?

**Text Message**

**Phone Call**

CONTINUE

- **Authenticator App.** You can download an app from your mobile app store. See [Use an authenticator app](#) below for details.
  - **Email.** You can add a second verified email address.
12. Once you have completed the verification process, you will have two pieces of verified security information listed and two-step verification is enabled.



13. Two-step verification is enabled on your account and you receive a confirmation at your verified security information.

[Back to Top](#)

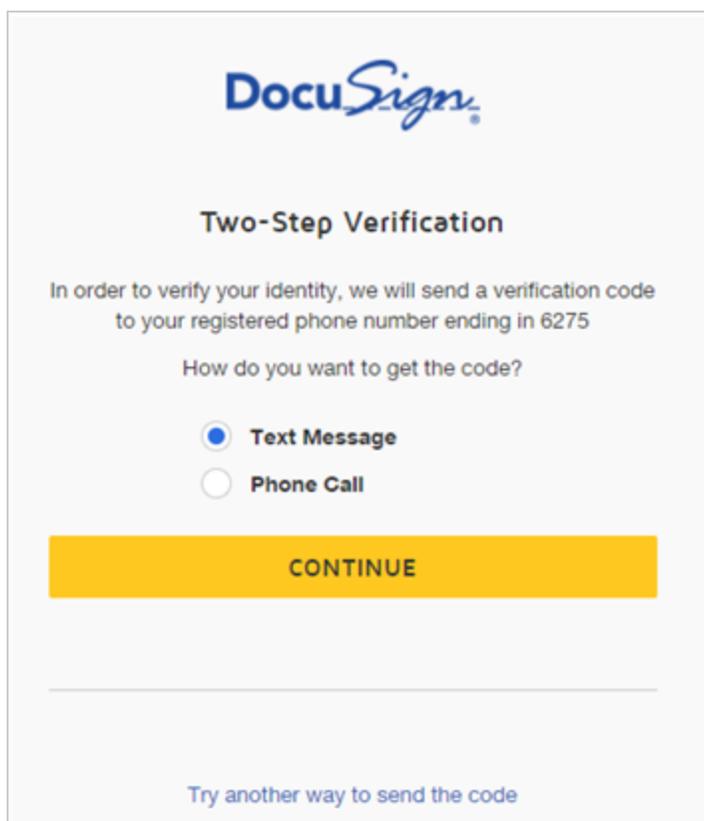
## Log in with Two-Step Verification

With two-step verification enabled, when you log in to DocuSign, you are prompted to verify a security code which you receive using your verified security information. After confirming your password, DocuSign sends a verification code to your registered phone number. You can select to receive either a text message or phone call.

### To log in with two-step verification

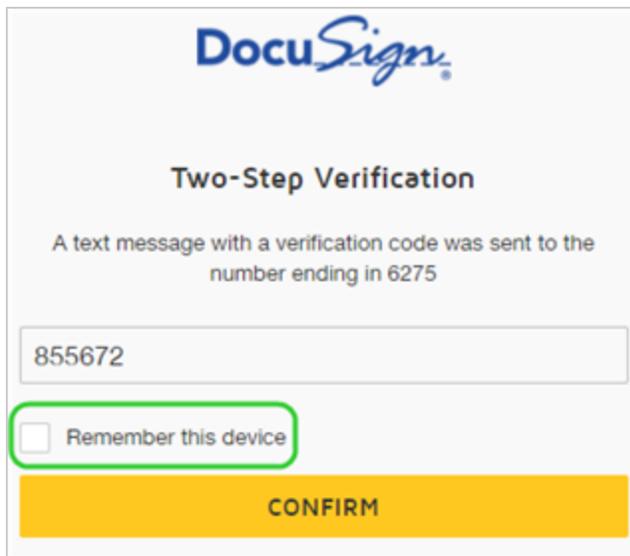
1. Use your browser to go to the DocuSign login page.
2. Enter your email address and password.

3. Select how to receive your verification code and click **CONTINUE**:
  - **Text Message**. Delivers the verification code over SMS, so this phone number must belong to a mobile device.
  - **Phone Call**. Places a voice call to your phone number. An automated system reads your code out loud.



The image shows a DocuSign Two-Step Verification screen. At the top is the DocuSign logo. Below it, the title "Two-Step Verification" is centered. The text reads: "In order to verify your identity, we will send a verification code to your registered phone number ending in 6275". Below this, it asks "How do you want to get the code?". There are two radio button options: "Text Message" (which is selected) and "Phone Call". A large yellow button labeled "CONTINUE" is positioned below the options. At the bottom, there is a horizontal line and a link that says "Try another way to send the code".

4. Once you receive the code, enter it in the space provided and click **CONFIRM**.
5. If you want DocuSign to remember the device you are using and bypass further two-step verification challenges when you use it to log in, select **Remember this device**.



**DocuSign**

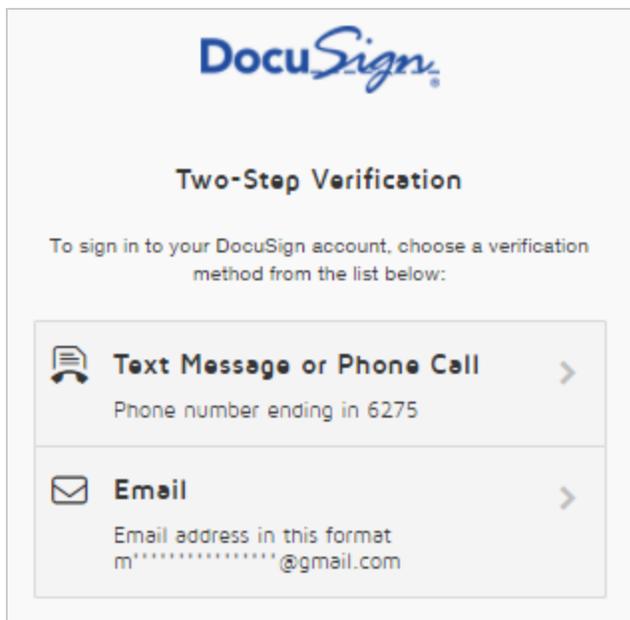
### Two-Step Verification

A text message with a verification code was sent to the number ending in 6275

Remember this device

**CONFIRM**

6. If you want to receive the code through a different verified security method, click **Try another way to verify your identity** and make your selection.



**DocuSign**

### Two-Step Verification

To sign in to your DocuSign account, choose a verification method from the list below:

-  **Text Message or Phone Call** >  
Phone number ending in 6275
-  **Email** >  
Email address in this format  
m\*\*\*\*\*@gmail.com

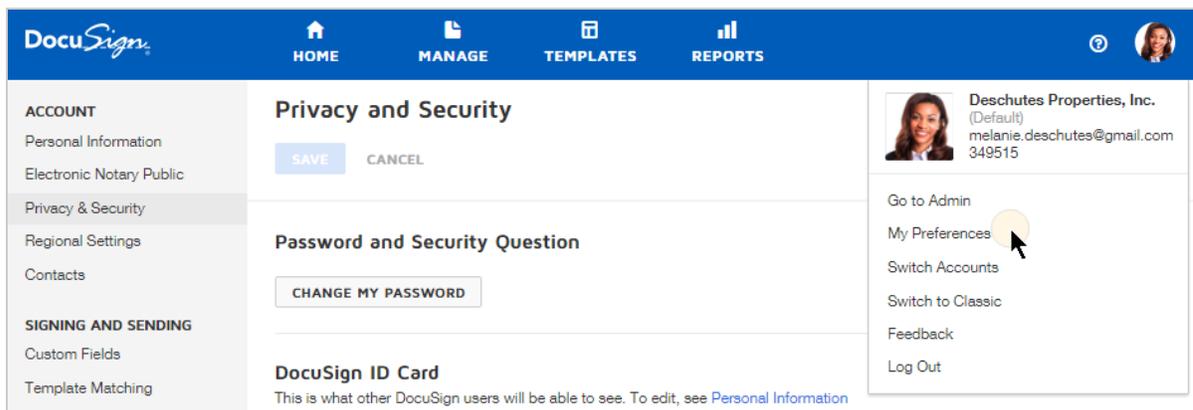
[Back to Top](#)

## Disable Two-Step Verification

You can disable two-step verification for your account at any time. DocuSign will keep your verified security to use if you decide to re-enable two-step verification, and for other use cases, such as when you need to reset your password.

### To turn off two-step verification

1. Log in to your DocuSign account and go to **My Preferences > Privacy & Security**.

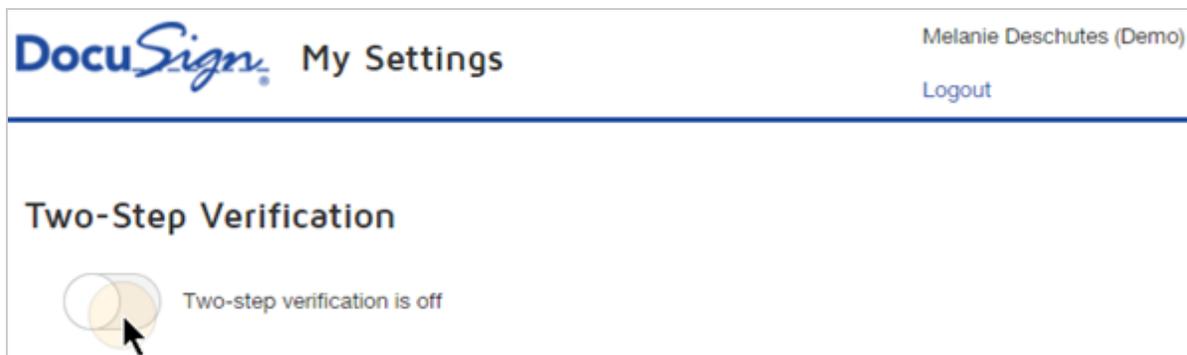


2. Scroll down to the Two-Step Verification section and click **MANAGE TWO-STEP VERIFICATION**.



3. Log in to your DocuSign account and complete the verification process.

4. Click to toggle two-step verification off.



Two-step verification is turned off on your account and you receive a confirmation message on all of your verified phone numbers and emails.

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## Use an Authenticator app for two-step verification

You can register one authenticator app to your identity in DocuSign. Authenticator apps are apps that scan a barcode and use that to generate new codes every 30 seconds to verify your identity. They are useful because they do not require cell service or an internet connection to get a code needed for two-factor authentication.

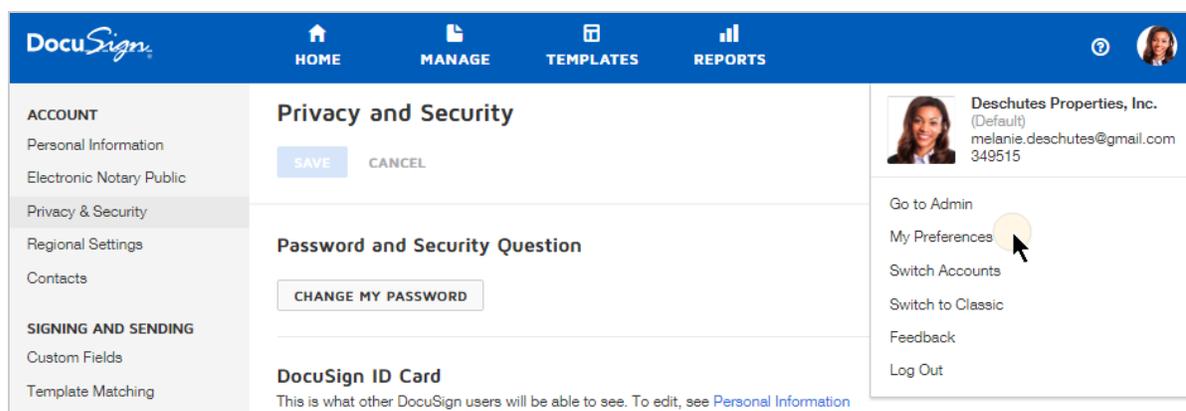
There are several options for which authenticator app to use. Here are a few we recommend:

- Google Authenticator (Apple App Store/Google Play)
- Microsoft Authenticator (Apple App Store/Google Play/Windows Phone)
- Authy (Apple App Store/Google Play)

**Note:** You must download and install the authenticator app of your choice onto your mobile device before you set it up to use with DocuSign's two-step verification.

## To set up an authenticator app to use with DocuSign verification

1. Log in to your DocuSign account and go to **My Preferences > Privacy & Security**.



2. Scroll down to the Two-Step Verification section and click **MANAGE TWO-STEP VERIFICATION**.
3. Log in to your DocuSign account and complete the verification process.
4. Click Add Security Information.

## Two-Step Verification

Two-step verification protects your account by requiring two pieces of information. Some mobile apps may not yet support this feature. [Learn more.](#)

Two-step verification is on

---

### Verified Security Information

 **Text Message or Phone Call**  
[REDACTED]

 **Email**  
amylyon@mailinator.com

**ADD SECURITY INFORMATION**

5. In the Add Security Information list, click **ADD** for the Authenticator App option.
6. On your mobile device, open the authenticator app follow the instructions in the Verify an Authenticator App.

## Verify an Authenticator App

1. You will need to first download an authenticator app from a mobile app store. Find our list of recommended apps [here](#).
2. Scan the QR code displayed below with the authenticator app on your phone.



If you are unable to scan this QR code, enter the key below into your authenticator app.

FEFV - AP3F - BYOG - Q6NM - WLWX - XZ3W - XJCP - MKZW

3. Enter the verification code generated by your authenticator app.

**CONFIRM**

**CANCEL**

7. Once you enter and confirm the verification code, the authenticator app is included in the Verified Security Information list. You can use the app to verify your future logins by entering the code displayed in the app.

## Use and best practices for Verified Security Information

You can register additional phone numbers, an authenticator app, and alternative email addresses to your identity in DocuSign. This gives you more alternatives into verifying your identity. For example, you may change phone numbers or no longer have access to that email address. DocuSign would need an alternative way of identify you, and without that, you will not be able to access your account.

It is always a good practice to make sure you change your security information before you lose access to the phone number, authenticator app, or email address that you originally registered with DocuSign. This is especially important with authenticator apps, which become usable pieces of verified security information if you lose or replace a mobile device. If you lose access to both the registered email address and phone number in DocuSign, you will no longer be able to access your account.

With a registered phone number, DocuSign now has a much stronger way to authenticate you as a user. This helps in other scenarios where we need your verification. For example, when you reset your password, we will now allow you to perform verification with your registered phone number instead of asking you your secret question. This ensures that DocuSign is always using the strongest form of verification where possible whenever you are making any changes to your account.

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## Manage Contacts

DocuSign includes a Contacts list to help make sending envelopes even easier. When you send an envelope, the recipients are automatically added to your Contacts list. You can [use the Contacts list](#) to quickly add recipients to the envelopes you send.

You can add, modify, and delete entries in your Contacts list through the **My Preferences > Account > Contacts** view.

## CONTENTS

[How to add, edit, or delete contacts](#)

[Signing group contacts](#)

[Shared contacts](#)

[How to share a contact](#)

[How to view shared contacts](#)

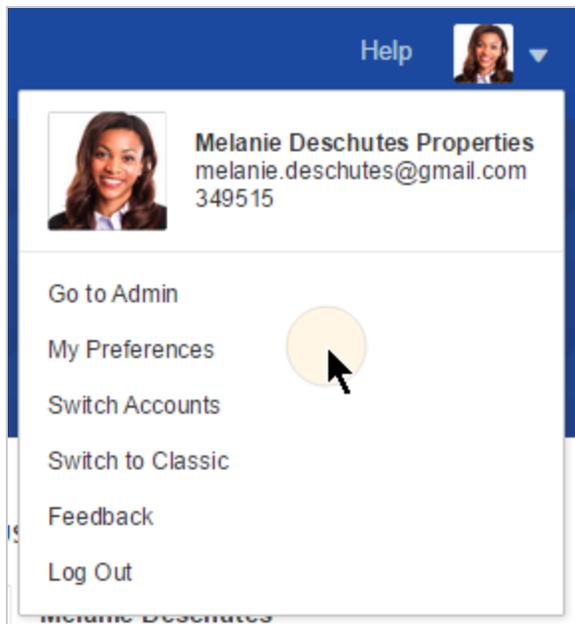
[Related topics](#)

**Note:** Your user permissions affect what types of contacts you can see in your Contacts list. If you cannot follow any of the instructions provided in this guide, check with your DocuSign administrator to see what Address Book permissions you have. For more information on setting user permissions, see [Permission Sets](#).

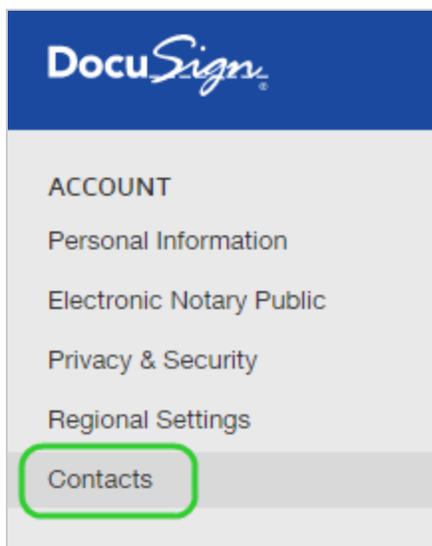
## To add, edit, or delete personal contacts

If your permissions include the ability to create personal contacts, you can add and manage them through your **My Preferences > Account > Contacts** view.

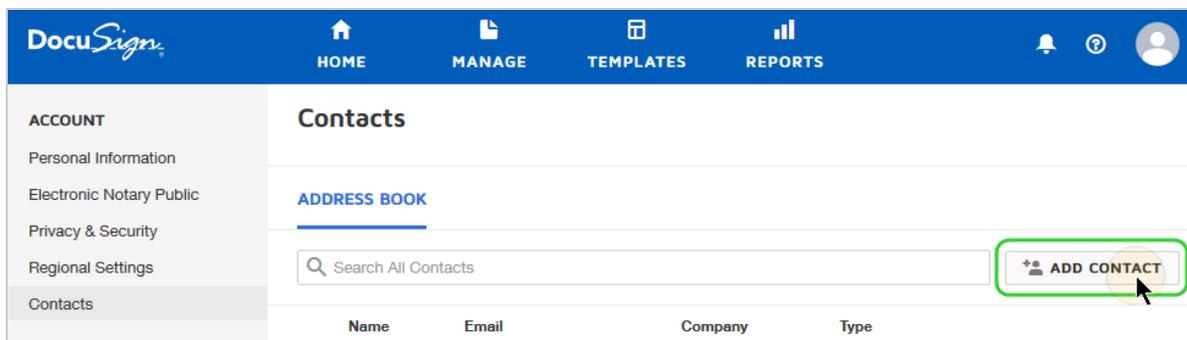
1. Go to **My Preferences**.



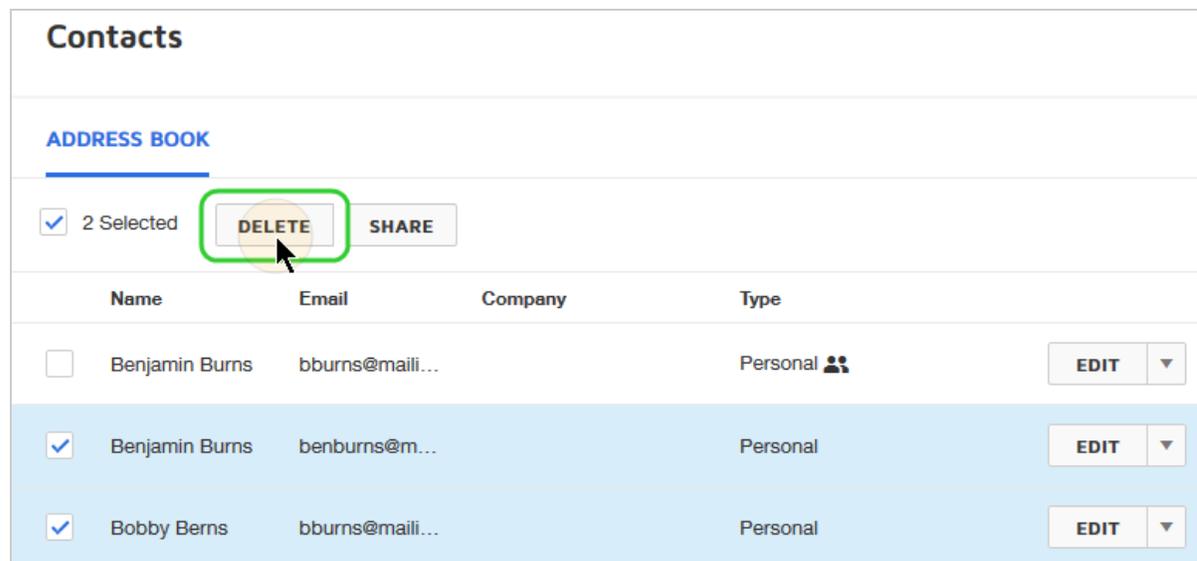
2. In the left-hand menu, under **Account**, select **Contacts**.



3. To add a contact, click **ADD CONTACT**, and enter the contact's name and email. You can also enter a company name and phone numbers.



4. To edit a contact, locate the contact by searching or scanning the list. Click **EDIT**, edit the contact details, and click **SAVE**.
5. To delete one or more contacts, select the check box next to the contacts you want to delete and click **DELETE**.



The screenshot shows the 'Contacts' section of the DocuSign interface. Under the 'ADDRESS BOOK' heading, there are two buttons: 'DELETE' and 'SHARE'. The 'DELETE' button is highlighted with a green circle and a mouse cursor. Below the buttons is a table with columns for Name, Email, Company, and Type. Three contacts are listed, with the second and third rows selected. Each row has an 'EDIT' button with a dropdown arrow.

	Name	Email	Company	Type	
<input type="checkbox"/>	Benjamin Burns	bburns@maili...		Personal	EDIT ▼
<input checked="" type="checkbox"/>	Benjamin Burns	benburns@m...		Personal	EDIT ▼
<input checked="" type="checkbox"/>	Bobby Berns	bburns@maili...		Personal	EDIT ▼

**Note:** Your contacts list is optimized for up to 500 contacts. While you can have more than 500 contacts saved, for performance reasons, you can only scroll through the first 500. To locate contacts beyond the first 500, you can use the Search function.

## Signing groups

Your Contacts list also may include signing groups. Signing groups enable you to send an envelope to a predefined group of recipients and have any one member of the group sign your document. Signing groups appear in the **Address Book** category with the Email designation "Signing Group".

You can search for signing groups by Name or your DocuSign account name. To see a list of the members of a signing group, click **VIEW**.

The screenshot shows the 'Contacts' page in the DocuSign interface. On the left is a navigation menu with sections: ACCOUNT (Personal Information, Electronic Notary Public, Privacy & Security, Regional Settings, Contacts), and SIGNING AND SENDING (Custom Fields, Template Matching). The main content area is titled 'Contacts' and has a sub-section 'ADDRESS BOOK'. A search bar contains the text 'Volunteers'. Below the search bar is a table with columns: Name, Email, Company, Type, and a 'VIEW' button. The table has one row with the following data: Name: Volunteers, Email: Signing Group, Company: Deschutes Pro..., Type: Shared with me. The 'VIEW' button for this contact is highlighted with a green rectangular box.

### Shared contacts

Depending on your user permissions, you may see shared contacts included in your Contacts Address Book. These are contacts shared with the account by other users and are identified by the Type "Shared with me".

This screenshot shows a different view of the 'Contacts' page. It features a search bar labeled 'Search All Contacts' and an 'ADD CONTACT' button. Below is a table with columns: Name, Email, Company, Type, and a 'VIEW' button. The 'Type' column is highlighted with a green rectangular box. The table contains two rows of shared contacts:

Name	Email	Company	Type	VIEW
<input type="checkbox"/> Abbie Ne...	abbie.newton@mailnesi...	French Market	Shared with me	VIEW
<input type="checkbox"/> Abby Angle	angle@mailinator.com	Zynx, Inc.	Shared with me	VIEW

**Note:** Your access to contacts, and to the ability to share contacts with other account users and see contacts shared by others, is controlled by your user permissions set. If you do not have access to the features presented in this help guide, check with your DocuSign administrator. For more information on setting user permissions, see [Permission Sets](#).

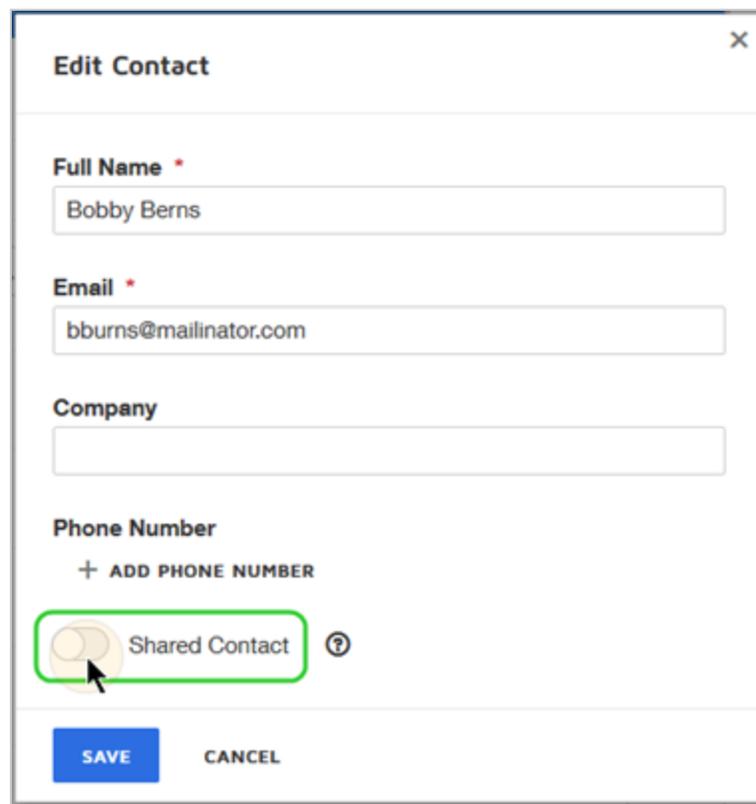
You may also be able to share your own contacts. If you share any of your contacts, then all other users on the account who have access to shared contacts can view and use the ones you shared.

Only the contact owner can edit or delete a shared contact; users with shared access to a contact can only view and use the contact.

## To share a contact

**Note:** In order to share contacts, your user profile must have the **Share** setting for the Address Book permission setting.

1. Go to **My Preferences > Account > Contacts**.
2. Locate the contact by searching or scanning the list, and then click in the contact row.
3. Toggle the **Shared** option to the on position and click **Save**.



**Edit Contact**

**Full Name \***  
Bobby Berns

**Email \***  
bburns@mailinator.com

**Company**

**Phone Number**  
+ ADD PHONE NUMBER

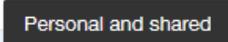
 Shared Contact ⓘ

**SAVE** **CANCEL**

Any user on the account who has access to shared contacts can now view and use the contact you shared.

## To view shared contacts

1. Go to **My Preferences > Account > Contacts**.
2. If you have access to both your own and shared contacts, your Address Book includes both types of contacts: **Personal** and **Shared with me**. If you have shared one of your personal contacts, the type includes a shared icon.

Contacts					
ADDRESS BOOK					
<input type="text" value="mailinator"/>					<input type="button" value="ADD CONTACT"/>
Name	Email	Company	Type		
<input type="checkbox"/>	Abby Angle	angle@maili...	Zynx, Inc.	Shared with me	<input type="button" value="VIEW"/>
<input type="checkbox"/>	Axel Aire	axelaire@m...		Shared with me	<input type="button" value="VIEW"/>
<input type="checkbox"/>	Benjamin Bu...	bburns@ma...		Personal 	<input type="button" value="EDIT"/> <input type="button" value="▼"/>
<input type="checkbox"/>	Mitchell Devon	mdevon@m...	Devonshire Creamery	Personal	<input type="button" value="EDIT"/> <input type="button" value="▼"/>

3. To view details for a shared contact, click **View**.

## Related topics

- [Add Recipients](#): How to add recipients to an envelope using your Contacts list.
- [Signing Groups](#): How to send an envelope to a signing group.
- [Signing Groups Administration](#): How to set up and manage signing groups. Signing groups are set up by your DocuSign administrator; you cannot modify them from your Contacts list.
- [Permission Sets](#): Information for administrators on managing permission sets.

## Time and Date Settings for Your Account

From your **My Preferences > Regional Settings**, you can view the time zone and date and time format in use for your account. The time and date settings are used to record events in your account, and are displayed in places like the envelope History and the Certificate of Completion.

If enabled by your account administrator, you can specify values for these settings.

The screenshot displays the DocuSign user interface for 'Regional Settings'. The top navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The left sidebar lists various account settings, with 'Regional Settings' highlighted. The main content area is titled 'Regional Settings' and contains a 'SAVE' button and a 'CANCEL' button. Below this, the 'Time and Date' section has two radio button options: 'Match my computer's time zone' (selected) and 'Specify a Time Zone'. Underneath is a 'Date/Time Format' dropdown menu showing '2017 September 6 | 15:24'. On the right side, there is a user profile for 'Deschutes Properties, Inc.' with a 'My Preferences' link highlighted in a green circle. The left sidebar also has 'Regional Settings' highlighted in a green circle.

**Note:** These settings do not affect the format of the Date Signed field. Your account administrator controls the formatting of the Date Signed field through **DocuSign Admin > Signing Settings > Document Formatting**. [More info...](#)

### Time zone setting

You can use your computer's time zone or specify a time zone by selecting that option, and then choosing a setting from the drop-down list.

### Time and Date

Match my computer's time zone

Specify a Time Zone

(UTC-08:00) Pacific Time ▼

## Date/time format setting

You can select from a large list of formats to reflect the date and time stamps in your preferred style. The date/time format is used to record events in your account, and are displayed in places like the envelope History and the Certificate of Completion.



## Read-only settings

If your account enforces default time and date values, then your settings reflect the account defaults and cannot be changed in your My Preferences. Your account administrator controls these values from the **DocuSign Admin > Regional Settings** view. [More info...](#)

## Regional Settings

[SAVE](#) [CANCEL](#)

---

### Time and Date ⓘ

Time Zone:  
(UTC-08:00) Pacific Time (US & Canada)

**Date/Time Format**  
9/6/2017 | 02:49 pm

## Manage Custom Fields

You can create custom versions of standard fields and save them for reuse on future documents. Define any combination of field properties, such as font type or size, or a validation setting. Custom fields help speed up your document preparation by allowing you to save fields customized for your use.

You can also [create custom fields directly in the Add Fields view](#), when you apply recipient fields to a document. The custom fields you create there, appear in the Custom Fields list in Preferences.

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or

contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## To manage custom fields

1. Go to **My Preferences > Signing and Sending > Custom Fields**.

Custom Fields				<a href="#">+ ADD NEW FIELD</a>
Name	Type	Owner	Shared	
Bold Red 20pt	Text	Melanie E. Deschutes	 <a href="#">ACTIONS</a> ▼	
Custom Dropdown	Dropdown	Marcus Perez	<a href="#">ACTIONS</a> ▼	
Custom Dropdown 2	Dropdown	Marcus Perez	<a href="#">ACTIONS</a> ▼	
Date Signed autoplace	Date Signed	Melanie E. Deschutes	 <a href="#">ACTIONS</a> ▼	

2. To create a new custom field:
  - a. Click **ADD NEW FIELD**.
  - b. Enter the properties for the field.  
**TIP:** Use a descriptive name to help you identify it later in the Fields palette.
  - c. Click **SAVE**.  
Your new custom field appears in the list.

3. To edit or delete an existing custom field:
  - a. Locate the field in the Custom Fields list.
  - b. To edit the field:
    - Click the **Actions** menu and select **Edit**.
    - Change the properties as desired and click **SAVE**.
  - c. To delete, click the **Actions** menu and select **DELETE**.

## Set Template Matching Account Preferences

You can enable and configure template matching for your account from your **Template Matching** preferences.

### CONTENTS

[How template matching works](#)

[Manage automatic template matching preferences](#)

[Related topics](#)

### How template matching works

Automatic template matching compares the files that you upload with all previously saved templates. Based on the sensitivity setting you select, if the match is close enough, you can choose to apply the matching template to your document, either automatically or with a notification. When you apply a matched template, all aspects of the template are applied to your new document: the recipients, messages, and the recipient signing fields.

With template matching enabled, you can tune the matching results by adjusting the template matching sensitivity setting. The higher the setting, the closer the document and the template must match before the feature triggers. The default value for this setting is 80%.

Finally, you can enable page-level matching, which means every page of the files you upload are checked for matches. With page-level matching disabled, only the first and last 25 words of the entire document are checked.

The screenshot shows the 'Template Matching' settings page in DocuSign. On the left is a navigation sidebar with sections: 'ACCOUNT' (Personal Information, Privacy & Security, Regional Settings, Contacts) and 'SIGNING AND SENDING' (Template Matching, Connected Apps, Notifications). The 'Template Matching' option is selected. The main content area is titled 'Template Matching' and contains a 'SAVE' button and a 'CANCEL' button. Below this is the 'Automatic Template Matching' section with the following settings:

- Match templates to uploaded files
- Automatically apply matching templates
- Notify me of matching templates
- Match sensitivity level:  %
- Enable page-level template matching

## To manage automatic template matching

1. Go to **My Preferences > Signing and Sending > Template Matching**.
2. To enable template matching, select **Match templates to uploaded files**.  
The feature is enabled and additional options display for you to configure.
3. Select how you want DocuSign to apply matching templates:
  - a. **Automatically**. When there is only a single template match for each uploaded file, the template is applied to the file automatically. If there are multiple matches for any uploaded file, then the matching dialog is shown and you must select which templates to apply.
  - b. **Notify me**. When you upload files and there are one or more matches, you are shown the matching dialog to select which templates to apply for each file.
4. (Optional) Adjust the Template Matching Sensitivity factor, by typing a value in the field.  
The default is **80%**.
5. (Optional) Select **Enable page-level template matching** to apply template matching to each page of your uploaded files.
6. Click **SAVE**.

## Related topics

For more information on topics related to template matching, see the following:

- [Set template matching behavior](#) - specify matching and set custom IDR zones on individual templates
- [Apply templates](#) - how to apply templates to the files you upload to an envelope

## Manage Notifications

DocuSign provides email notifications to senders and recipients for many different scenarios. By default, all of the notifications are turned on. The Notifications preferences give you control over the communications that you receive.

We know you're busy—you may not want to be notified every time an envelope that you sent was viewed, or when another recipient reassigns an envelope to you. After all, everything you need to know about an envelope, either as a sender or as a recipient, is visible from your DocuSign account. The email notifications are just a convenience to let you know about any change or activity.

### To manage notifications

1. Go to **My Preferences > Signing and Sending > Notifications**.

The screenshot shows the DocuSign user interface. The top navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The left sidebar menu has 'ACCOUNT' and 'SIGNING AND SENDING' sections. Under 'SIGNING AND SENDING', 'Notifications' is highlighted with a green arrow. The main content area is titled 'Notifications' and has 'SAVE' and 'CANCEL' buttons. Below this is the 'SENDING NOTIFICATIONS' section with the heading 'Notify me when I am the sender and:'. A list of notification events follows, all with checked boxes: 'Select All', 'An envelope is complete', 'A signer assigns an envelope to someone else', 'A signer declines to sign', 'A signer withdraws consent to do business online', 'The first time each recipient views an envelope', 'Envelope delivery to a recipient fails', and 'A signer's offline signature fails to synchronize'. On the right, a user profile for 'Deschutes Properties, LLC' is shown with a dropdown menu containing 'Go to Admin', 'My Preferences' (highlighted with a green arrow), 'Switch Accounts', 'Switch to Classic', 'Feedback', and 'Log Out'.

The list of Sending and Recipient Notifications appears. By default, all notification options are turned on.

2. Clear the check box for any notification that you do not want to receive.
3. Click **SAVE**.  
Your notification preferences are updated and the changes apply to all future envelopes.

## Changing the Frequency of Comment Notifications

Each member of an account can control the frequency of comment notifications. How you change the frequency of comment notifications depends on whether you want to change the frequency of comment notifications on documents you are sending out for signature or for documents you have received and have been asked to sign.

### **To change the frequency of comment notifications on envelopes you send**

If you feel like you're getting too many email notifications about comments on documents you're sending for signature, you can change the frequency of notifications you're receiving. The change applies to all documents you send from the account.

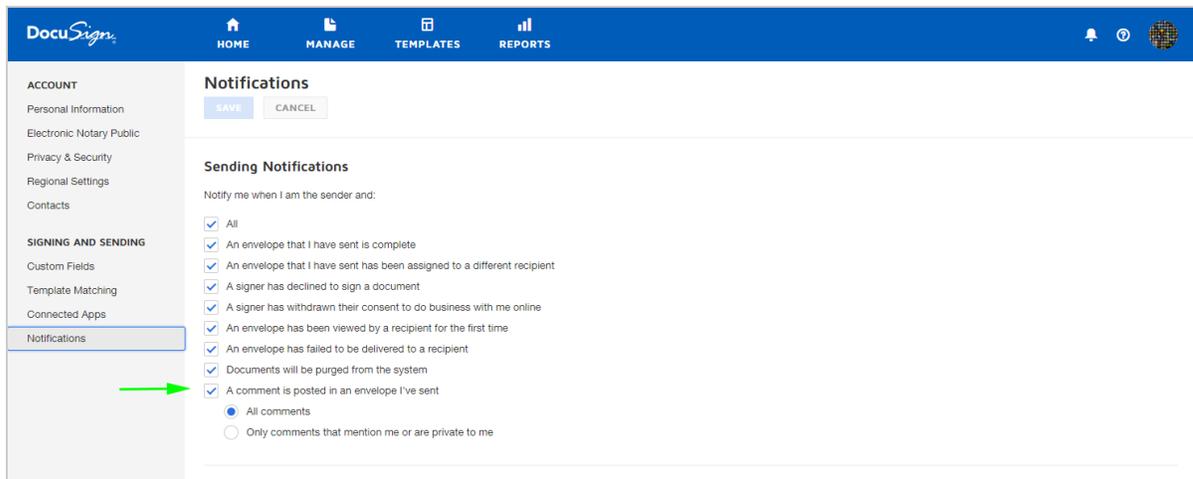
1. Go to [www.docusign.com](http://www.docusign.com) and log in to your DocuSign account.
2. In your DocuSign account, click the account menu drop-down in the upper right corner and select **My Preferences**.

The screenshot shows the DocuSign user dashboard. At the top, there is a navigation bar with 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The main header area says 'Sign or Get Signatures' with a yellow 'NEW' button. On the right, a user profile for 'Alex Designs SF' is shown with a dropdown menu. The 'My Preferences' option in the dropdown is highlighted with a green box. Below the header, there are sections for 'OVERVIEW' (Action Required, Waiting for Others, Expiring Soon, Completed), 'WHAT'S NEW' (Shared Template Folders, Supplemental Documents), and 'MY DOCUSIGN ID'. At the bottom, there are sections for 'TIPS AND TRICKS', 'WE WANT YOUR FEEDBACK', and 'HELP AND SUPPORT'.

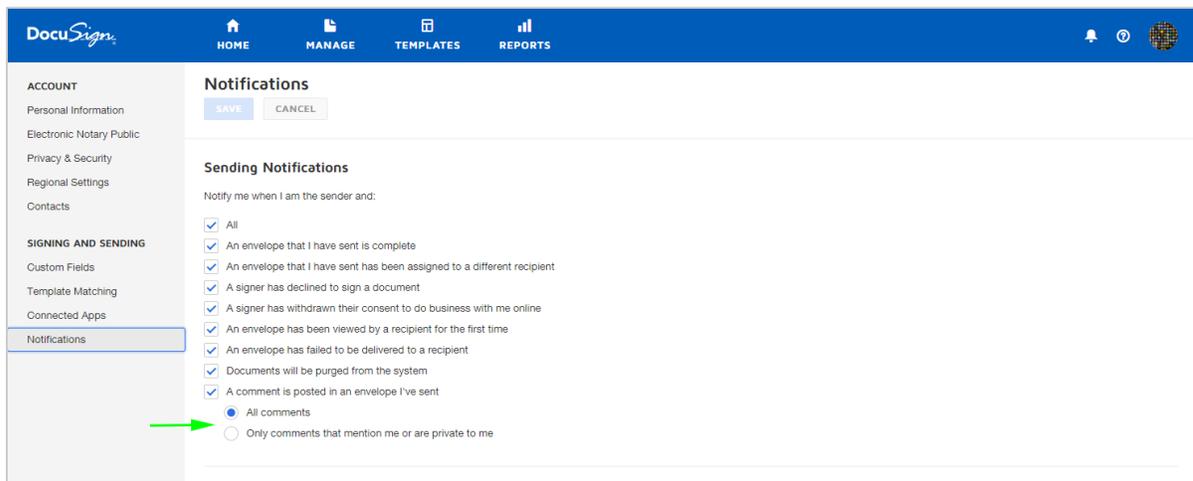
3. On the Preferences page, on the left under SIGNING AND SENDING, select **Noti-  
fications**.

The screenshot shows the 'Personal Information' preferences page. The left sidebar has a 'SIGNING AND SENDING' section with 'Notifications' highlighted by a green box and a green arrow. The main content area shows the user's profile for 'Alex Designs' with fields for email, account name, and default account, along with an 'EDIT PHOTO' button.

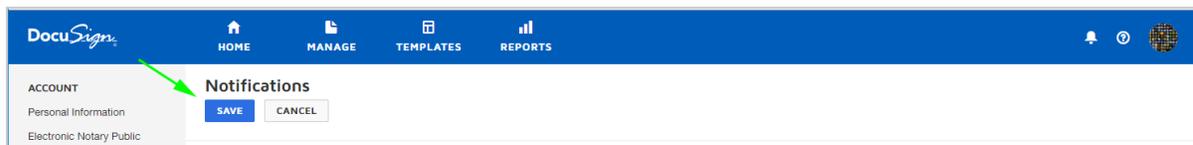
4. On the right, under Sending Notifications:
  - To enable comment notifications, check **A comment is posted in an envelope I've sent**.
  - To disable comment notifications, uncheck **A comment is posted in an envelope I've sent**.



5. You can further customize the frequency of notifications by choosing whether you are notified every time one of your recipients comments or replies to a comment or whether the recipient chooses to reply only to you.
  - To receive notification for all comments and replies, choose **All comments**.
  - To receive notification of comments sent only to you, choose **Only comments that mention me or are private to me**.



6. At the top (or bottom), click **SAVE**.



To change the frequency of comments notifications on envelopes you receive

If you feel like you're getting too many email notifications about comments in envelopes you're asked to sign, you can change the frequency of notifications you're receiving. The change applies to all envelopes you receive that are sent to the email address associated with your account. You can only change the frequency of comments notifications you're receiving if you have an account at DocuSign.

1. Go to [www.docusign.com](http://www.docusign.com) and log in to your DocuSign account.
2. In your DocuSign account, click the account menu drop-down in the upper right corner and select **My Preferences**.

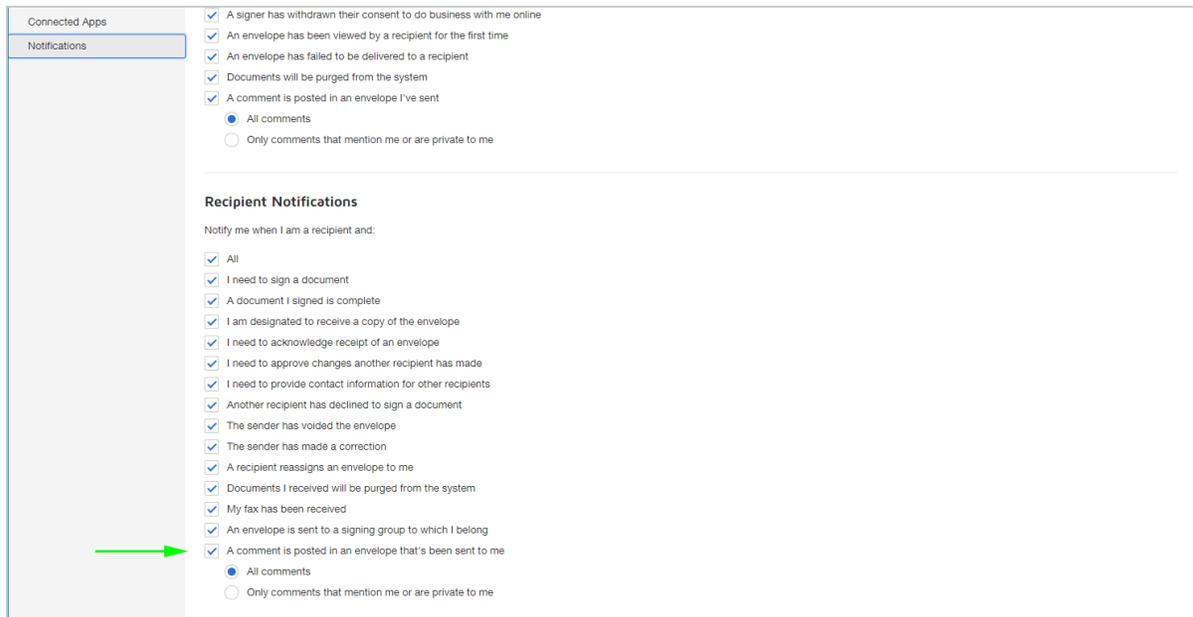
The screenshot shows the DocuSign user dashboard. At the top, there is a navigation bar with 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The main header area says 'Sign or Get Signatures' with a yellow 'NEW' button. On the right, a user profile for 'Alex Designs SF' is shown with a dropdown menu. The 'My Preferences' option in the dropdown is highlighted with a green box. Below the header, there are sections for 'OVERVIEW' (Action Required, Waiting for Others, Expiring Soon, Completed), 'WHAT'S NEW' (Shared Template Folders, Supplemental Documents), and 'MY DOCUSIGN ID'. At the bottom, there are sections for 'TIPS AND TRICKS', 'WE WANT YOUR FEEDBACK', and 'HELP AND SUPPORT'.

3. On the Preferences page, on the left under SIGNING AND SENDING, select **Noti-  
fications**.

The screenshot shows the 'Personal Information' preferences page in DocuSign. The left sidebar has a 'SIGNING AND SENDING' section with 'Notifications' highlighted by a green box and a green arrow. The main content area shows the user's profile for 'Alex Designs' with fields for email, account name, and default account, along with an 'EDIT PHOTO' button.

4. On the right, under Recipient Notifications:

- To enable comment notifications, check **A comment is posted in an envelope that's been sent to me.**
- To disable comment notifications, uncheck **A comment is posted in an envelope that's been sent to me.**



Connected Apps

Notifications

- A signer has withdrawn their consent to do business with me online
- An envelope has been viewed by a recipient for the first time
- An envelope has failed to be delivered to a recipient
- Documents will be purged from the system
- A comment is posted in an envelope I've sent
  - All comments
  - Only comments that mention me or are private to me

**Recipient Notifications**

Notify me when I am a recipient and:

- All
- I need to sign a document
- A document I signed is complete
- I am designated to receive a copy of the envelope
- I need to acknowledge receipt of an envelope
- I need to approve changes another recipient has made
- I need to provide contact information for other recipients
- Another recipient has declined to sign a document
- The sender has voided the envelope
- The sender has made a correction
- A recipient reassigns an envelope to me
- Documents I received will be purged from the system
- My fax has been received
- An envelope is sent to a signing group to which I belong
- A comment is posted in an envelope that's been sent to me
  - All comments
  - Only comments that mention me or are private to me

5. You can further customize the frequency of notifications by choosing whether you are notified every time one of your recipients comments or replies to a comment or whether the recipient chooses to reply only to you.

- To receive notification for all comments and replies, choose **All comments.**
- To receive notification of comments sent only to you, choose **Only comments that mention me or are private to me.**

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- My fax has been received
- An envelope is sent to a signing group to which I belong
- A comment is posted in an envelope that's been sent to me
  - All comments
  - Only comments that mention me or are private to me

6. At the top (or bottom), click **SAVE**.

DocuSign

HOME MANAGE TEMPLATES REPORTS

ACCOUNT

Personal Information

Electronic Notary Public

**Notifications**

**SAVE** CANCEL

## Related Topics

Admin settings (admin privileges required): See [Comments Settings](#).

Envelope settings: See [Disabling Comments on an Envelope](#).

## Electronic Notary Profile

Notaries in select jurisdictions can use DocuSign eNotary to electronically witness and authenticate the execution of documents. Notaries must have a DocuSign account and the electronic notary profile must be set up before they can use DocuSign to notarize document.

A notarial journal records all of the electronic notary sessions, and the details are also captured on the [Certificate of Completion](#).

**Note:** In accordance with the [Notary Terms and Conditions](#), the sender of the envelope and notary are responsible for ensuring that electronic notarization is acceptable for the specific jurisdiction and document.

### CONTENTS

[Adding and managing a jurisdiction](#)

[The Notarial Journal](#)

[Related topics](#)

## Adding and managing a jurisdiction

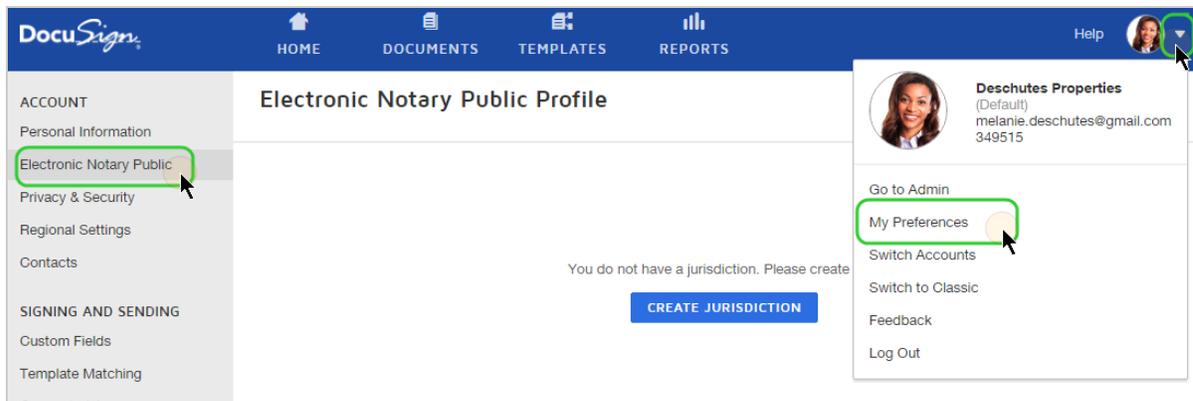
As a notary in any of our supported jurisdictions, you can add an electronic notary public profile with your notary commission information. Once you create a valid notary jurisdiction profile, you can provide electronic notary services through DocuSign.

## To create a jurisdiction

1. Log in to your DocuSign account.
  - If you are new to DocuSign and you received an Activation email for a new account, complete the account activation first.
  - If you need to create a free account, go to <https://secure.docusign.com/signup/free> and sign up.

**Note:** These free accounts allow you to set up your electronic notary public profile and complete requests for eNotary service. You cannot, however, send a document and include an eNotary service request.

2. Go to **My Preferences > Account > Electronic Notary Public**.



3. Click **CREATE JURISDICTION**.
4. Complete the fields in the Jurisdiction form with your notary commission details and agree to the Terms and Conditions.
5. Click **SAVE**.

Your jurisdiction is added.

### Electronic Notary Public Profile

**MELANIE R. DESCHUTES**  
Notary Public

State of Washington  
Commission Expires 2/28/2017

Melanie R. Deschutes [Edit](#)

Washington [Edit](#) | [Delete](#)

6. Ensure your name and commission information is entered correctly. Use the **Edit** link next to your jurisdiction to make any necessary corrections.
7. Enter your address into your DocuSign profile so that it will be available to you during the electronic notary session.
  - a. Click the **Edit** link next to your name to open the Personal Information view for your account.
  - b. Complete the Company, Job Title, Address, and Phone fields.
  - c. Click **SAVE**.

## The Notarial Journal

After you successfully complete an electronic notary session, the details of the transaction are automatically captured in the Notarial Journal, including the signer's name and

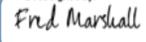
signature. If the signer did not have a Signature field to complete, then the Signature column shows "Completed".

Here's an example of a Notarial Journal entry:

**Notarial Journals**

[EXPORT](#) Q Search

1 - 1 of 1 journal First < > Last

Date	Signer Name	Jurisdiction	Document Signed	Signature
Dec 7, 2016   16:50	Fred Marshall	Washington - Snohomish	Please DocuSign this document: Real Estate Purchase Contract.pdf	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> <small>DocuSigned by:</small>    <small>3DA6FF4383AE45D...</small> </div>

1 - 1 of 1 journal First < > Last

## To print your notarial journal

You can export a copy of your notarial journal to a PDF by clicking the **EXPORT** button on the journal. You can export all journal entries, or use the search to select a subset of entries, and then export that set.

The PDF contains complete journal information with the additional fields from the notary transaction, as shown in the following example. You can download or print the PDF.

Notary Journal Export					
1 / 1					
<p>Notary Journal for Melanie Deschutes Dec 7, 2016   17:17 PST</p>					
<b>Date</b> Dec 7, 2016   16:50 PST	<b>Jurisdiction</b> Washington	<b>Document</b> Please DocuSign this document: Real Estate Purchase Contract.pdf	<b>Signer</b> Fred Marshall	<b>Signature</b> DocuSigned by: <i>Fred Marshall</i> 3049FF4353A245D...	<b>ID Type</b> Driver's License
<b>Notes</b> WDLN54398543					
<b>Credible witness list</b>					
Witness: Winnie Marshall		Address: 8 Vista Rd, Seattle, WA		Signature: <i>WMM</i>	
<b>Date</b> Dec 7, 2016   17:16 PST	<b>Jurisdiction</b> Washington	<b>Document</b> Please DocuSign this document: Real Estate Purchase Contract.pdf	<b>Signer</b> Abbie Newton	<b>Signature</b> DocuSigned by: <i>Abbie Newton</i> 253D1188664C40D...	<b>ID Type</b> Military ID
<b>Notes</b> USAF registration AKF485JIYU					

## Related topics

For more information on topics related to notarizing documents through DocuSign eNotary, see the following:

- [Notary process overview](#). A guide for notaries to the complete electronic notary process.
- [Signing with a notary](#). Step-by-step instructions on how to sign a document with a notary.

## Manage Stamps

DocuSign Stamps enables customers in varying markets, cultures, roles, and industry verticals to apply a stamp to be representative of their signature, official approval, or company acknowledgment to documents.

Just like adopting a signature, you can add your own personal stamps to your DocuSign account profile. When you receive documents to sign that contain a Stamp field, you can use your saved stamps.

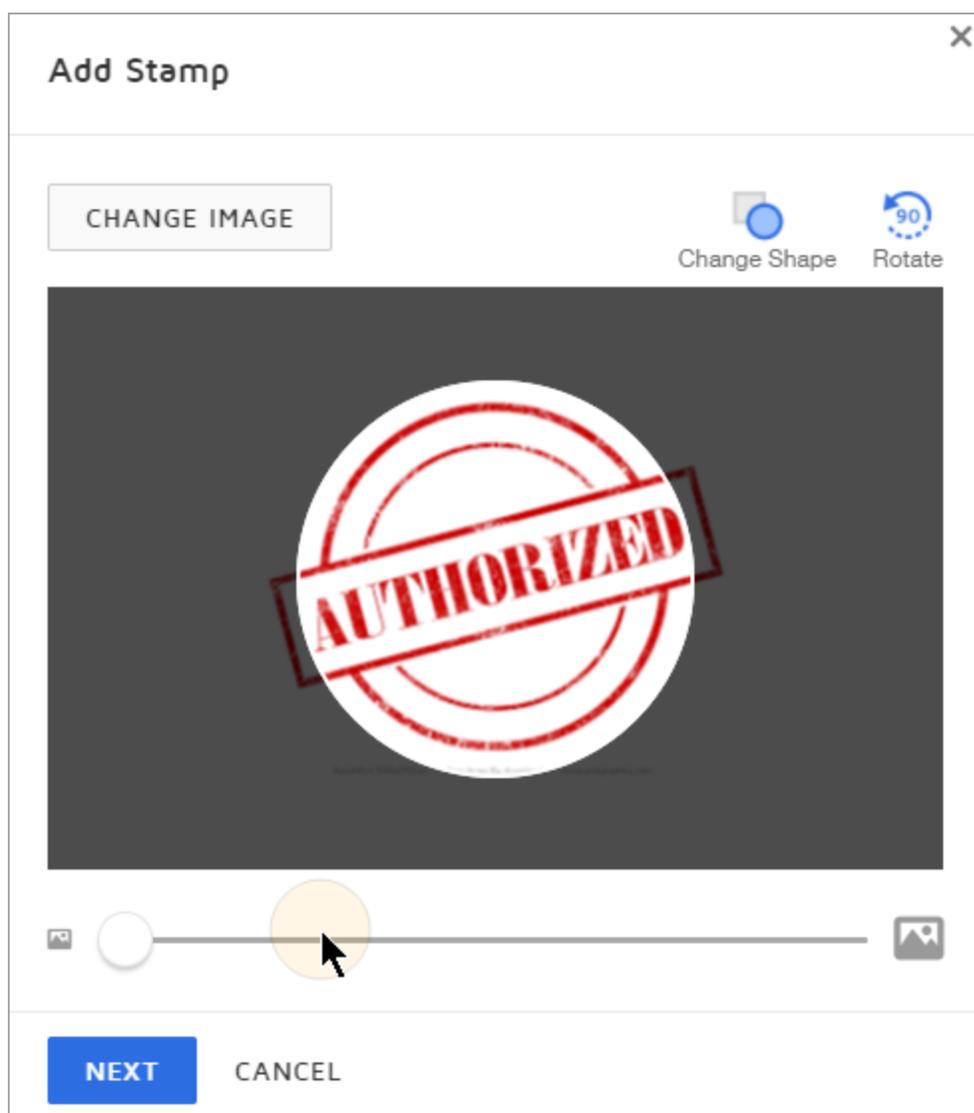
For Japan, the adoption of eSignature has been influenced by the fact that signers are accustomed to using a Hanko to represent their signature on paper documents. DocuSign Stamps supports eHanko functionality, allowing signers to upload and apply their personal Hanko to represent their signature on an agreement.

You manage your personal stamps in **My Preferences**, in the **Stamps** section.

The screenshot displays the DocuSign user interface. At the top, there is a navigation bar with the DocuSign logo and menu items: HOME, DOCUMENTS, TEMPLATES, and REPORTS. On the right side of the navigation bar, there is a 'Help' link and a user profile icon. The user profile icon is highlighted with a green circle. Below the navigation bar, there is a sidebar menu on the left with the following categories: ACCOUNT, SIGNING AND SENDING, and Notifications. The 'Stamps' option under the ACCOUNT category is highlighted with a green circle. The main content area is titled 'Stamps' and shows a message: 'You currently do not have any Stamps.' Below this message is an 'ADD STAMP' button. On the right side of the main content area, there is a user profile card for 'Schreiber Labs (Default)' with the email 'schreiberlabs@gmail.com' and the ID '1908860'. Below the profile card is a dropdown menu with the following options: 'Go to Admin', 'My Preferences' (highlighted with a green circle), 'Switch to Classic', 'Feedback', and 'Log Out'.

## To add a stamp

1. From **My Preferences > Stamps**, click **Add Stamp**.
2. Select your stamp image by dragging and dropping the image file onto the Add Stamp dialog, or click **Browse** to locate and select an image.
3. Use the slider to scale the image to fit within the shape window.



4. If your image is square, click the **Change Shape** option to switch to a square window.
5. When your image is correctly positioned in the stamp window, click **Next**.
6. Enter a name for your stamp and click **Adopt**.

The stamp is saved in your account and will be available for you to use when you sign a document that has a Stamp field for you to complete.

**Note:** Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, check your account plan or contact your Account Manager or Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

## Manage Connected Applications

You can connect applications to your DocuSign account to enable access to your cloud storage providers, such as Google Drive, and grant access to your DocuSign account to third-party applications.

You can manage your connected applications in **My Preferences** in the **Connected Apps** section.

The screenshot shows the DocuSign user interface. At the top, there is a navigation bar with 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. On the left, a sidebar menu includes 'ACCOUNT', 'SIGNING AND SENDING', and 'Notifications'. The 'Connected Apps' section is highlighted in the sidebar. The main content area shows 'Connected Apps' with a sub-section for 'Cloud Storage Apps'. Below this, there is a table listing connected apps: Box (Disconnect), Dropbox (Connect), and GoogleDrive (Disconnect). On the right, a user profile dropdown menu is open, showing the user's name 'Deschutes Properties, Inc.', email 'melanie.deschutes@gmail.com', and phone number '349515'. The 'My Preferences' option in the dropdown is highlighted with a green circle.

## CONTENTS

[Managing your cloud storage providers](#)

[Managing applications with access to DocuSign](#)

### Managing your cloud storage providers

You can upload files stored with cloud storage providers, like Google Drive or Dropbox, to send through DocuSign. To use cloud storage files, you first give DocuSign access to your cloud storage provider. You can disconnect authorized cloud storage providers at any time.

The following providers are supported:

- Google Drive
- Dropbox

- Box
- OneDrive

Your DocuSign administrator controls which providers you can use and you may not see all of these options in your account. Administrators can refer to [Connected Apps](#) for details.

**Note:** Google file formats (Docs, Sheets, and Slides) are not supported in their native format for direct upload. But if you connect your Google Drive cloud storage to DocuSign, you can use the cloud storage option to add the Google files to an envelope. See "Supported File Formats" on page 60 for more details.

## To give DocuSign access to cloud storage providers

1. Navigate to **My Preferences > Connected Apps**.
2. In the Cloud Storage Apps section, click **Connect** for the storage provider you want to access.

Your DocuSign administrator controls which providers you can use. If you do not see some of the [supported providers](#), check with your account administrator.

3. Sign in to your cloud storage provider account.  
DocuSign is now authorized to access your cloud storage files for the selected provider.

## To disconnect cloud storage access

1. Navigate to **My Preferences > Connected Apps**.

The Cloud Storage Apps list appears, showing the available storage apps and the connection status.

2. To disconnect a storage app, do either of the following:

- To disconnect a specific app, click the **Disconnect** link next to the provider's name.
- To disconnect all storage apps, click the **Disconnect All Apps** link at the bottom of the list.

### Cloud Storage Apps

DocuSign can always get document files from your computer's file system, but if you get your documents from an application which generates or stores them for you, connecting DocuSign directly to that application can save you the step of saving to your computer before you can use the file. Connected apps appear available wherever you upload files to create a DocuSign envelope.

 Box	<a href="#">Disconnect</a>
 Dropbox	<a href="#">Connect</a>
 GoogleDrive	<a href="#">Disconnect</a>
 Salesforce	<a href="#">Connect</a>
 OneDrive	<a href="#">Connect</a>

[Disconnect All Apps](#)

DocuSign is no longer authorized for the selected cloud storage apps and you can no longer upload files directly from the apps to DocuSign. You can reauthorize providers at any time by following the first procedure in this topic.

## Applications with Access to your DocuSign account

If you grant applications access to your account to send or sign documents, you can view and revoke this access at any time.

### To manage applications with access to DocuSign

1. Navigate to **My Preferences > Connected Apps**.
2. In the Applications with Access to DocuSign section, click **Manage Apps**.  
The list of connected apps appears.
3. To remove access for an app, click the **REVOKE** button next the connected app you wish to remove.  
The application's access to your account is revoked and the application is removed from the list of connected apps.

## Switch Accounts and Set a Default Account

Some DocuSign users have multiple DocuSign accounts. A common example is someone who has an account through work and another account for personal transactions. If you have multiple DocuSign accounts, and they use the same email and password combination, then you can easily switch between them once you log in.

This account switching is only available for accounts using the same email and password combination, and only applies to active and suspended accounts. Inactive or closed accounts do not show up in the account drop-down.

## CONTENTS

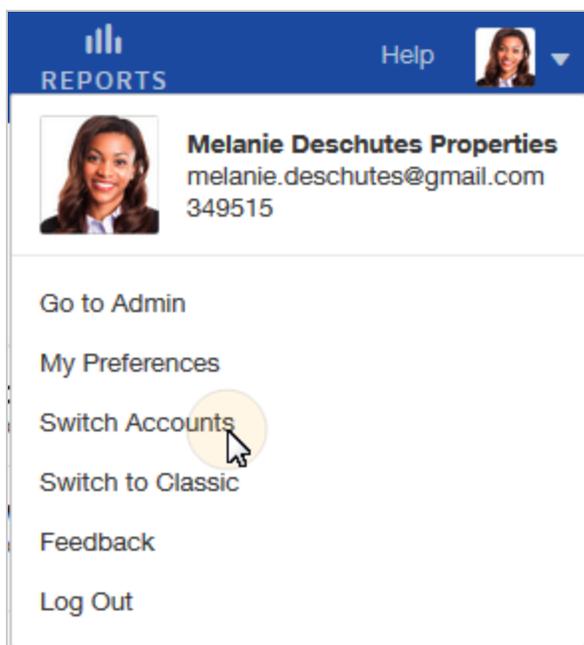
[How to switch between accounts](#)

[Set a default account](#)

### To switch between accounts

1. Click your profile image to show the account actions menu.

The account listed next to your image is the current account currently in use.



2. Select **Switch Accounts**.
3. In the Select an Account dialog, select the account to switch to.  
DocuSign refreshes and loads the selected account. The new account selection appears at the top of the account actions menu.



## Set a default account

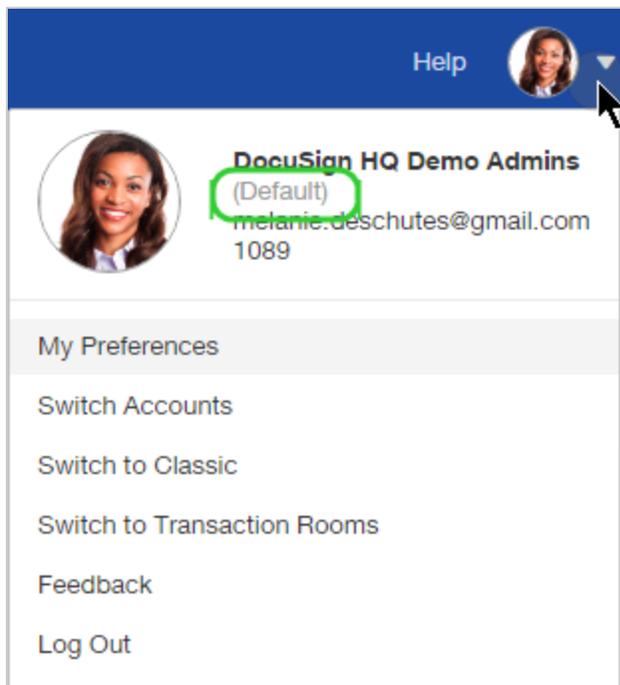
If you have multiple accounts and can switch between them, then you can select one of the accounts to be your default account. When you set a default, you will always start in that account when you log in.

### To set a default account

1. Switch to the account you want to be your default using the **Switch Accounts** menu option.
2. Click your profile image to display the account settings menu, and select **My Preferences**.
3. In the Personal Information section, select the **Set as default** account.

The screenshot displays the DocuSign user interface. At the top, there is a dark blue navigation bar with the DocuSign logo and four menu items: HOME, MANAGE, TEMPLATES, and REPORTS. Below this is a light gray sidebar menu. The 'ACCOUNT' section is expanded, showing options like Personal Information, Electronic Notary Public, Privacy & Security, Regional Settings, and Contacts. The 'SIGNING AND SENDING' section includes Custom Fields, Template Matching, Connected Apps, and Notifications. The main content area is titled 'Personal Information' and contains a sub-header: 'To configure what information is shared when you sign, edit [Privacy & Security](#)'. Below this are 'SAVE' and 'CANCEL' buttons. A profile picture of a woman is shown with an 'EDIT PHOTO' button below it. To the right of the photo, the user's name 'Melanie E. Deschutes' is displayed with an 'Edit' link, followed by the email address 'melanie.deschutes@gmail.com' and another 'Edit' link. Below the email is the text 'Account: Goldstar Properties' with an 'Edit' link. A button labeled 'Set as default account' is highlighted with a green border.

Your default account is set and the next time you log in you will open this account. The account is identified as the default here and in the account menu.



## Switch to the Classic DocuSign Experience

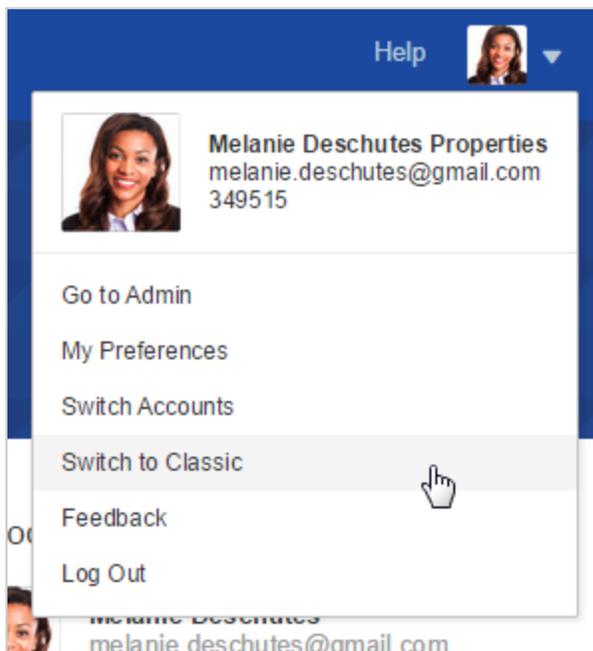
The new experience provides the most commonly-used features from our classic DocuSign experience, plus all the latest updates and new capabilities. For many users, the new experience provides everything they want in DocuSign.

However, some users may not be ready to transition to the new experience. If your account allows you access to the classic experience, you can switch back to the classic experience, using one of the following two options:

**IMPORTANT:** Not all users and accounts have the option to switch back to classic. Check with your DocuSign administrator if you cannot follow the steps presented in this guide.

- **To switch to the classic experience for the current session only.**

Use the **Switch to Classic** link in the account settings menu at the top right of all the main application pages:



You will remain in the classic experience for the duration of your current logged-in session only. The next time you log in to DocuSign, you will be back in the new experience.

**Note:** Not all users have this option. If you do not see the **Switch to Classic** link, either your plan type is fully covered by the features in the new experience, or your DocuSign administrator has opted to require all users to use the new experience.

- **To change to the classic experience for current and future sessions.**

Select your **My Preferences > Privacy & Security** settings, and scroll down to the **Experience** section. Then select **Use Classic**.

### Experience

You are using the New DocuSign Experience, where you'll receive the latest updates and new features. If you prefer our older app, you can still use the Classic DocuSign Experience.

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You will remain in the classic experience until you select the **Switch to New** link there to return to the new experience.

## API Request Logging

If you experience problems with your account and engage DocuSign Customer Support, the Support rep may ask you to enable API Request logging on your account. This logging captures the last 50 API requests and assists Support in troubleshooting account issues.

Once you enable logging, you can download the resulting logs, and provide them to your Support rep to help analyze your account issues.

**Note:** Enable API Request logging when you are actively engaged in troubleshooting an account issue. Logging captures up to 50 requests and then disables. You can download the request log files and then re-enable logging to continue capturing API requests.

## To use API Request logging

1. Click the account settings drop-down next to your Profile image, and select **My Preferences**.
2. Under General preferences, select **Privacy & Security**.
3. In the Request Logging section, you can do the following:
  - **ENABLE LOGGING** - to begin logging API requests for your account
  - **DISABLE LOGGING** - to stop logging requests
  - **DOWNLOAD** - to download a zipped file containing log files for all captured API requests
  - **CLEAR # of 50 LOGS** - to clear any logged requests and continue logging
4. Click **Save**.