

# DocuSign Service QuickStart Guide

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## zipForm<sup>®</sup>6 Setup and Sending Guide

### Overview

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This guide shows how to easily set up your zipForm<sup>®</sup>6 account to directly load into your DocuSign<sup>®</sup> member console to speed up the process of sending out contracts to your clients.

This guide also provides an overview of how to send zipForm<sup>®</sup>6 forms for signing using DocuSign.

For more information and details on working with the DocuSign Service, see the *DocuSign Service User Guide*.

### Table of Contents

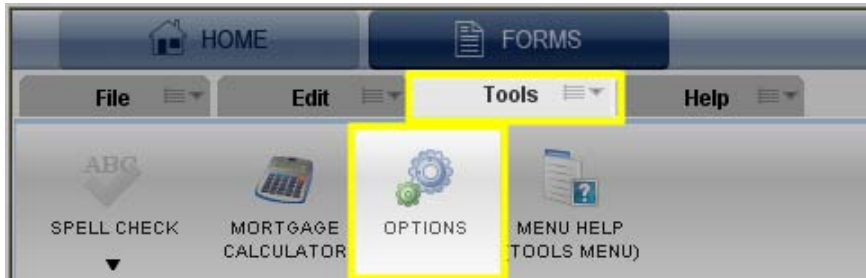
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Credential Setup .....	2
Sending from zipForm <sup>®</sup> 6 and DocuSign Overview.....	3
For More Information .....	4

## Credential Setup

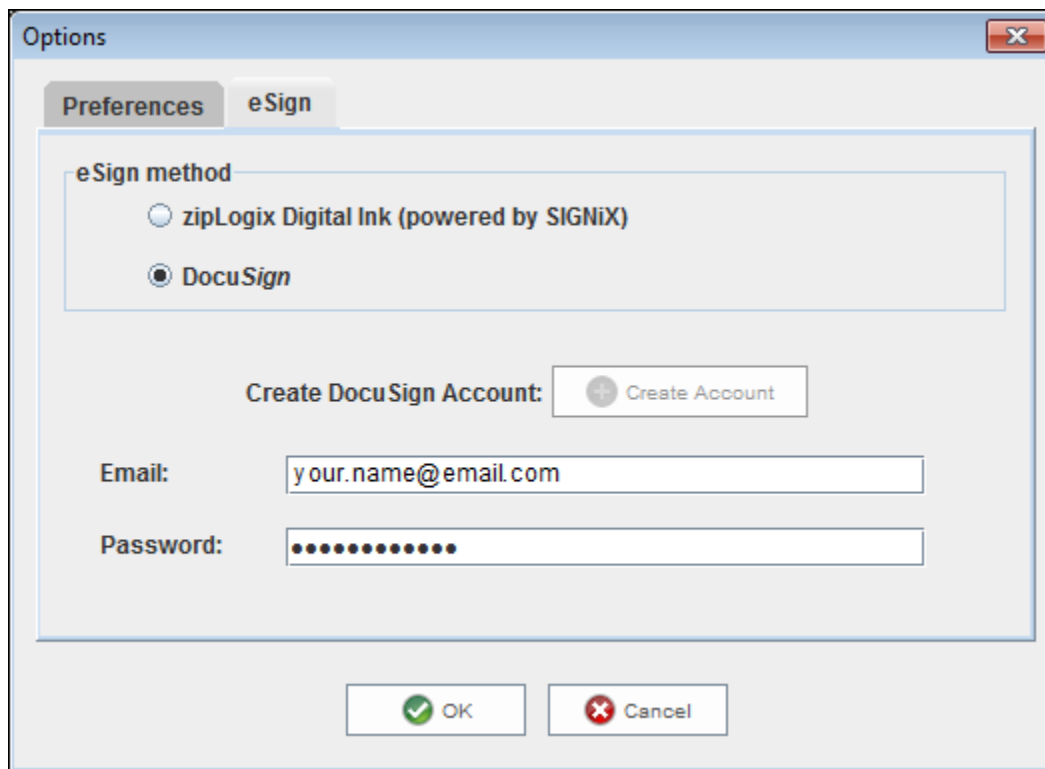
To use DocuSign with your zipForms®6 account you need to set up your credentials in zipForm®6.

1. Open a browser window and go to the ZipFormOnline Login. Log in to your zipForm®6 account.
2. Click the **Forms** tab.
3. From the Forms tab, click the **Tools** tab and click **Options**. The Options dialog box appears.



Click the **eSign** tab.

4. Select **DocuSign** and type the **Email** and **Password** used to log on to your DocuSign account.




Click **OK**. Your credentials are now set up and you can send documents for signing using DocuSign.

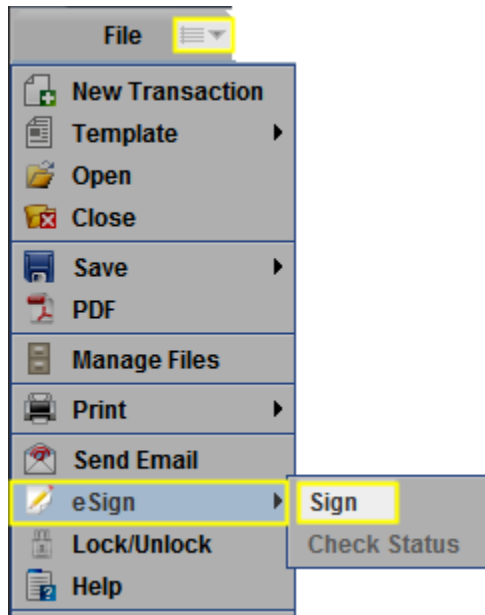
**Note:** If you get an error message that your credentials are invalid, you might have mistyped your email or password. If you need to reset your password, email [passwordreset@docusign.com](mailto:passwordreset@docusign.com).

If you get an error message that states, "You do not have sufficient permissions to interact with DocuSign." email [service@docusign.com](mailto:service@docusign.com) to enable this feature on your account.

## Sending from zipForm® 6 and DocuSign Overview

You are now ready to send forms directly to your DocuSign account.

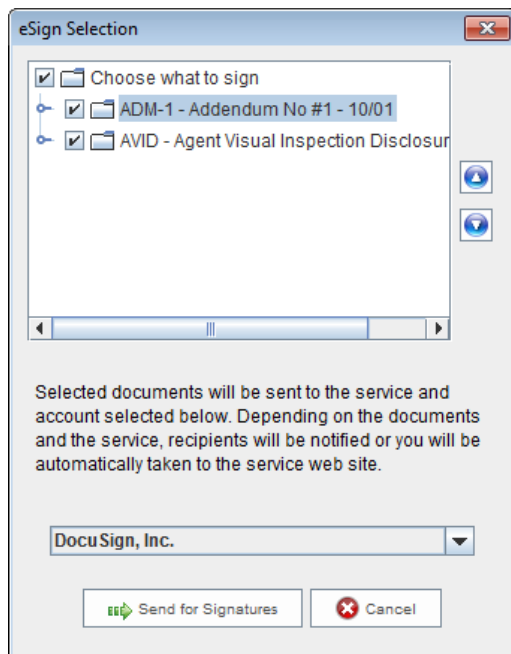
1. Once you have filled out your forms in zipForm® 6, on the **File** tab click the options menu button  to show the available options.



Select **eSign** from the menu and then select **Sign**. The eSign Selection dialog box appears.

2. Choose the form(s) to send by selecting or clearing the checkbox adjacent to the form. You can select all the forms by selecting the checkbox adjacent to **Choose what to sign**.

Select the DocuSign account to be used to send the documents from the drop-down list.



Click **Send for Signatures**. The Select Recipients dialog box appears.

3. Select the recipients for the document and type the recipients' Email, Name and set the Signing Order for the recipients.

**Note:** The Signing Order sets the order in which recipients receive and perform signing and other activities. Recipients can have the same Signing Order number, in which case they are sent the document at the same time and can sign in parallel, or have different numbers, in which case they are sent the document sequentially.

Provide the email address and name of your recipients below. The values in the order column will determine signing order. Recipients with a lower number must sign before those with a higher number will receive notification to sign.

Select/Unselect All

	Role	Email	Name	Signing Order
<input checked="" type="checkbox"/>	Buyer One		K Smith	1
<input checked="" type="checkbox"/>	Buyer Two			1
<input checked="" type="checkbox"/>	Reviewed By			1
<input checked="" type="checkbox"/>	Seller One			1
<input checked="" type="checkbox"/>	Seller Two			1

Modify    Send Now    Cancel

Modify in DocuSign

By clicking Send, I agree that I have previewed all the documents and that I have kept only the signature and initial fields which are applicable to this transaction for the selected signers.

4. Click **Send Now** to send the document OR click **Modify in DocuSign** to make changes to the document, add tabs or other information. If you are modifying in DocuSign, unselect all the recipients in the Select Recipients dialog box.

**Important:** If you click **Modify** you are taken to the zipLogix Digital Ink system, not to the DocuSign system. You must click **Modify in DocuSign** to make changes using DocuSign.

If you click **Modify in DocuSign**, the DocuSign Console opens in a new browser window with the documents loaded in an electronic envelope. For information on how to set up an envelope and send to your clients, please refer to the sender documentation and user guide section of our Web site: <http://www.docusign.com/senders-support/sender-product-documentation-and-user-guides>.

## For More Information

For more information about additional DocuSign features, go to the DocuSign Support Site at:

<http://www.docusign.com/senders-support/support-main-page>

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## Patent Information

Licensed under U.S. Patent 6,289,460, U.S. Patent 6,944,648, and other patents pending.

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