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## Requesting Documents from your Recipients

### Overview

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Using the DocuSign® Service, you can request supporting documents from your recipients and allow them to provide those documents by fax or upload as an attachment to the DocuSign envelope during the signing process.

**Note:** Signer Attachments are optional feature and might not be enabled for your account. Contact your Account Manager or DocuSign Service ([service@docusign.com](mailto:service@docusign.com)) for more information about the features enabled for your account.

The process to request that a signer provide supporting documentation is similar to the standard procedure for sending documents. This guide provides the additional steps for requesting supporting documents and an overview of what your recipient will see when they receive a document with a document request. The general process for requesting documents from you recipients is:

- create an envelope, add documents and recipients
- add the signer attachment
- place tabs for signatures in the document and place the Signer Attachment tag
- review and send the envelope.

The procedures in this guide assume that you have a DocuSign account and are logged on to the console. For more information and details on any of these subjects, see the *DocuSign Service User Guide*.

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## Adding a Document Request to an Envelope

The process to request that a recipient provide supporting documents is similar to the standard procedure for sending documents for electronic signatures. The additional steps to request a document are shown in this procedure.

1. Create a new envelope. Add documents, recipients, Email Subject and Email messages, select any Envelope Settings, and add tags to the documents normally.

**Note:** DocuSign recommends that you add a note for the recipient providing information and instructions about the documents they need to provide.

2. Select the recipient that will provide the document. Click and drag a Signer Attachment tag onto the document.



Modify the Properties for the tag as needed.

Repeat this step to add additional document requests.

**Note:** In order to add multiple Signer Attachment tags, the Allow Multiple Signer Attachments option must be enable for your account. To access this functionality, contact your Account Manager or DocuSign Service ([service@docusign.com](mailto:service@docusign.com)) for assistance.

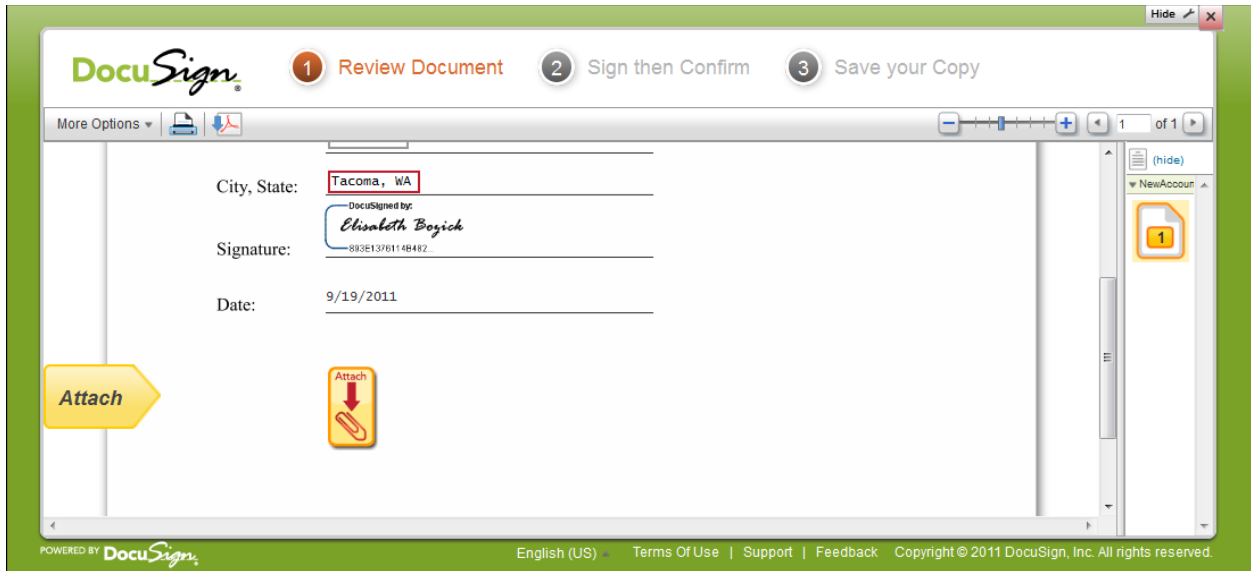
3. Complete sending your envelope normally.

When your recipient receives the envelope with email with instructions on how to sign the document and how to provide the specified attachment.

## What Your Recipient Sees

The information below is an overview of how a recipient adds the documents you have requested. For detailed information about how a recipient adds requested documents, see the *Signing Documents with Requests for Attachments* Signer guide.

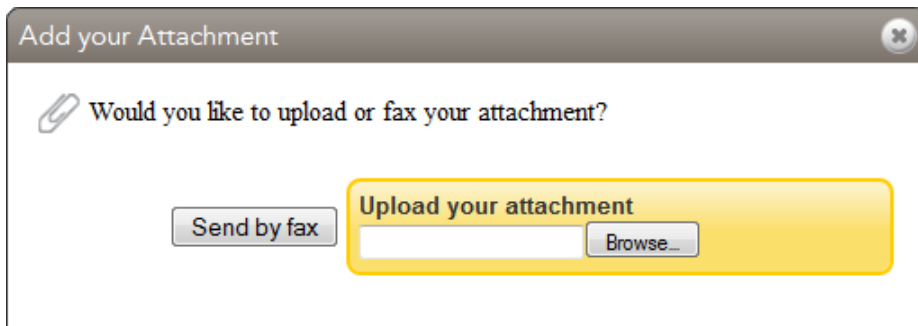
During the signing process, the recipient is prompted to provide the attachment.



The steps taken by the recipient depends on how your recipient is submitting the requested documents; by upload or by fax.

### Uploading the Documents

If the recipient will upload the requested document, they must have an electronic copy (such as a scanned copy) of the document saved as a file on their computer. The recipient clicks the **Attach** tag, the Add your Attachment dialog box appears.



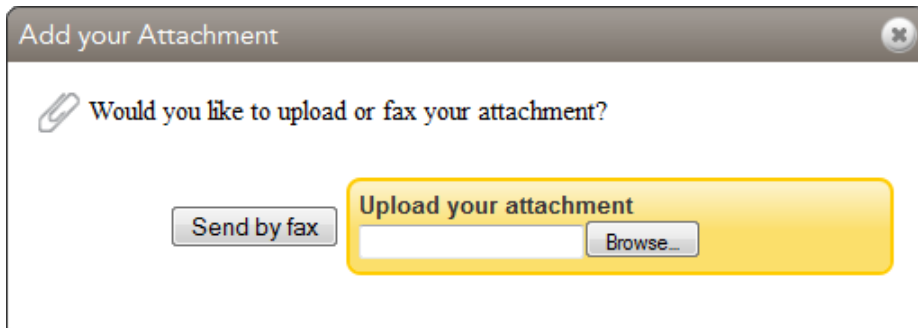
The recipient clicks **Browse...** and selects the file to upload.

The system attaches the file to the envelope as a new page and replaces the Attach tag with an upload icon. If they need to upload another attachment or remove an attachment, they can click the upload icon and repeat the steps for uploading or select to remove the attachment.

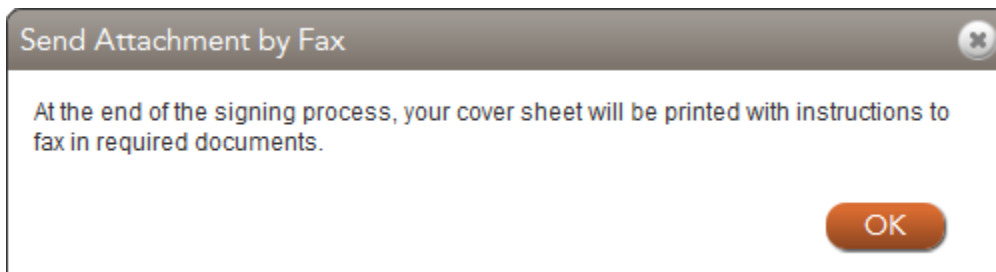
After the documents have been uploaded and all other tags are filled out or signed, the recipient completes the signing process normally.

### Faxing the Documents

If the recipient will fax copies of the requested documents, they click the **Attach** tag and the Add your Attachment dialog box appears.

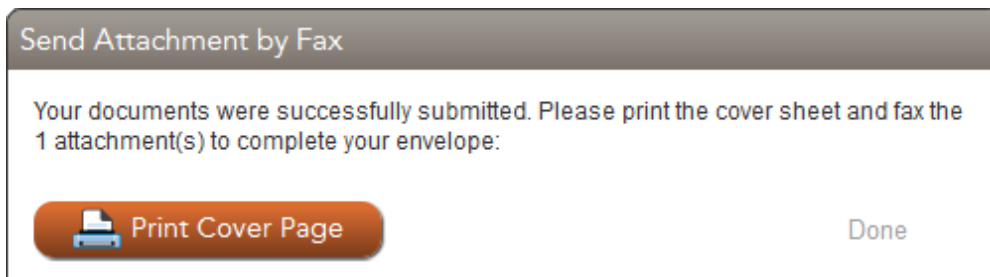


The recipient clicks **Send by fax**, the Send Attachment by Fax dialog box appears. The dialog box informs the signer that they will be able to print the fax cover sheet at the end of the signing process. The signer clicks **OK** to continue.



The system replaces the Attach tab with a fax icon. The recipient can click the fax icon to cancel the fax process anytime until the fax is received.

After all the remaining tags are filled out or signed, the second Send Attachment by Fax dialog box appears. The recipient clicks **Print Cover Page** to print the fax cover page.



A new browser window opens with a fax cover sheet. The recipient prints the fax cover sheet and follows the instructions on the printed fax cover sheet to fax the requested documents.

**Note:** When faxing documents the signer only needs one fax cover page for all the requested documents.

After the fax cover page is printed, the signing process is completed normally.

## For More Information

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

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

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1301 2nd Avenue, Suite 2000  
Seattle, WA 98101  
tel 206.219.0200  
fax 206.622.0736  
[www.docusign.com](http://www.docusign.com)