



The global standard for eSignature

Sending a Document for Free-Form Signing

Overview

A feature of the DocuSign® Service is the ability to quickly create and send documents for signing without placing tabs or using a template. This guide provides an overview of how to send a document for free-form signing. The general steps in this process are:

- prepare an envelope and add a document
- add a recipient
- add your subject and message for the envelope
- 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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Guided Signing and Free-Form Signing

The DocuSign Service offers two basic ways to have recipients add signatures, initials or other information to a document: Guided Signing and Free-Form Signing. The procedure for sending a document for Free-Form signing is explained in this guide.

With Guided Signing, the sender places tags for signatures, initials and other information in documents manually or by applying a template. These tags serve as guideposts to help recipients know where to sign, initial or provide other information in the document. When recipients open documents sent for guided signing, DocuSign walks the recipient through an orientation and the signing process to complete the signing. Guided signing is the standard way envelopes are sent. For more information about sending a document for guided signing, see the *Sending a Document with DocuSign* quick start guide or the *DocuSign Service User Guide*.

With Free-Form Signing, documents are sent to recipients without adding tags. When recipients open documents sent for free-form signing, DocuSign walks the recipient through an orientation and then the recipient sees the Click & Drag dialog box in the upper left corner of the document window. The recipients are able to click and apply or drag their signature, initials and other information onto the document to complete signing.

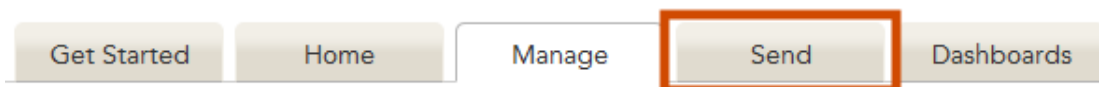
The DocuSign Service also offers options for having recipients sign on paper and return documents as file attachments or by fax. For more information about these topics, see the *Allow your Recipients to Sign on Paper* or *Requesting Documents from your Recipients* quick start guides or the *DocuSign Service User Guide*.

Starting a New Envelope

Note: The options and screens shown in your browser might be different from those shown in this guide depending on your account type and options. If you have questions about the options available for your account, contact your Account Manager or DocuSign Service (service@docusign.com) for assistance. For more information on different options, refer to the *DocuSign Service User Guide* or Console online help.

A DocuSign envelope is a container used to send one or more documents for signature using the DocuSign system. An Envelope can have multiple documents and several recipients. The documents in an envelope can have multiple pages.

1. Click the **Send** navigation tab. The Prepare Envelope page is displayed.



Alternately, you can click the down arrow on the **Create** button and select **Envelope** or click the **Actions** button and select **New Envelope**. If you are on the Home tab, you can click **Start a New Envelope**.

Note: You can save an envelope as a draft by clicking **Save Draft** at the bottom of the page. The saved envelope is placed in the Draft folder. You can exit the page without saving the envelope by clicking **Discard Changes** at the bottom of the page.

Adding Documents to Your Envelope

In the Documents for Signature section, you add documents from your computer or an online document, which includes templates and external documents.

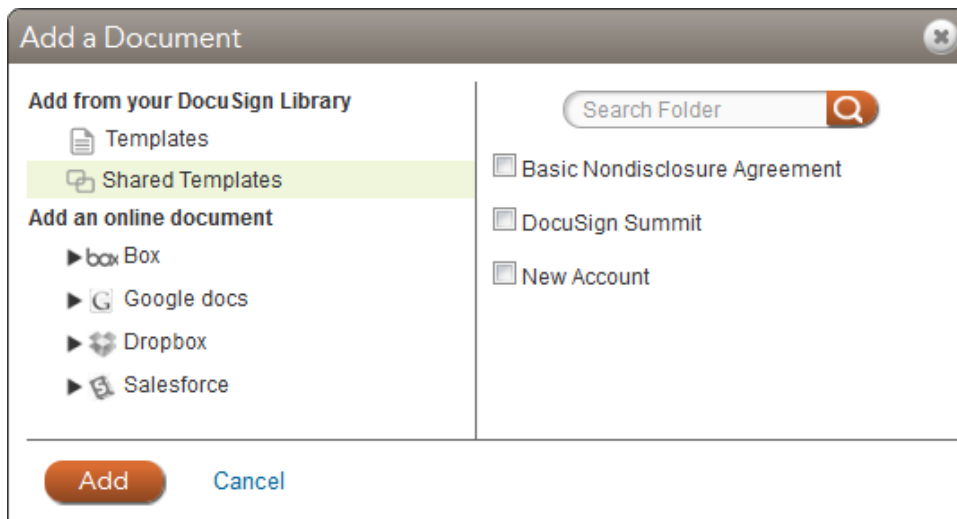
1. Select the source of your document:



- To upload documents from your computer: click **Browse from my Computer**, the File Upload dialog box is displayed. Locate the file on your computer or network and click **Open**. The document is added to the envelope and a thumbnail image of the document is added to the section.



Note: If Automatic Template Matching is enabled for your account, the system checks to see if the document you've uploaded matches a template in your system. If a match is found, the system gives you the option of applying that template to the document.

- To upload a Template or an external document: click **Choose an Online Document**, the Add a Document dialog box is displayed. Select the location of the Template or online document you want to upload on the left side of the dialog box. Select the Template or document and then click **Add**. The document is added to the envelope and a thumbnail image of the document is added to the section.



Note: If you want to select a document from an external source, such as Box.Net or GoogleDocs, you might need to log on to the external document source.

2. Repeat Step 1 to add another document to the envelope.

3. You can make changes to the documents you've uploaded as described below:
 - You can view a PDF version of the document by clicking on the document image.
 - You can change the name of the uploaded document by clicking in the document name field and typing a new name.
 - Click **Other Actions** to apply a template, match the document with a template, replace the document, or recognize form fields for PDFs with Adobe Form Fields.
 - To move a document up or down in the order of appearance, click on the grip icon () associated with the document and drag the document to the new location.
 - To remove a document, click the remove icon () associated with that document.
4. After all documents are added, go to the Recipients section to add envelope recipients.


Adding Recipients to Your Envelope

In the Recipients and Routing section you add recipients and, optionally, set the routing order and add identification methods.

The routing order sets the order in which recipients receive and can act on documents in the envelope. Recipients with the same routing order receive and can act on envelopes at the same time (in parallel), while recipients with different routing orders receive and act on envelopes in sequential order.

1. Type the Recipient's Email address and Name in the appropriate field. As you type, the system will provide suggestions to auto-fill the fields based on entries in your Address Book. Click **Add Signer** to add the recipient to the list with a Sign recipient Action or click **Add CC** to add the recipient to the list with a Receive a copy recipient Action.


Recipients and Routing

Recipient Email  Add Me

Recipient Name

Add Signer
Add CC

Sending to Yourself: You can add yourself as a recipient by clicking the **Add Me** link, your information is added to the Recipient Email and Recipient Name, and then click **Add Signer** or **Add CC**. The system adds you to the list.

Adding recipients from your DocuSign Address Book: You can add recipients from your DocuSign Address book by clicking the address book icon (), the Address Book dialog box appears. Select if you are looking in your Personal Contacts or Shared Contacts address book, then select the recipients you want to send the envelope to and click **Add**. All the selected names are added with a Sign recipient Action.

Sending a Bulk Recipient file: If your account is enabled to send bulk recipient files, you can upload a file with multiple recipients. See the *Using the Bulk Recipient Feature* quick start guide or *DocuSign Service User Guide* for more information about this feature.

For more information about recipient actions and options, see the Adding Recipients to Your Envelope section in the *DocuSign Service User Guide* or online help.

2. Repeat step 1 to add additional recipients.
 - If you have multiple recipients, you can change the routing order in which the recipients receive the envelope and perform signing and other activities. To set routing order, type the **Order** in which your recipients receive and sign the document.
 - Alternately, if you have already set the order for some recipients, you can click on the grip icon (☰) associated with the recipient and drag them to the new order. The Order number for the recipient is automatically updated.
 - You can remove a recipient by clicking the remove icon (✖) associated with that recipient.
3. After all recipients are added, go to the Email Subject section.

Adding Email Message Information

In the Email Message section you can customize the email subject and, optionally, the messages for recipients.

Note: The DocuSign service automatically adds a subject based on the documents you have added.

Email Message

Email Subject to **All Recipients**

Please DocuSign these documents: New Account and Parking Application

Email Message to **All Recipients**

Select recipient email language

Add a Note to

1. Type an **Email Subject** for the envelope. The subject is limited to 100 characters.
2. Optionally, type an Email Message for all recipients. The message is limited to 2000 characters.
3. Optionally, add a note for a recipient:
 - Select the recipient for the message from the Add a Note to: list and click **Add**. The Custom note dialog box appears.
 - Type the message for the recipient. The message is limited to 1000 characters.
 - Repeat this step to add a message for a different recipient.
4. After the Email Message information is added, you can optionally go to the Envelope Settings section.

For more information about other email actions, see the Adding Email Message Information in the *DocuSign Service User Guide* or online help.

Adding Envelope Settings and Sending the Envelope

The Envelope Settings section lets you set recipient options, reminders and expirations, and sender settings.

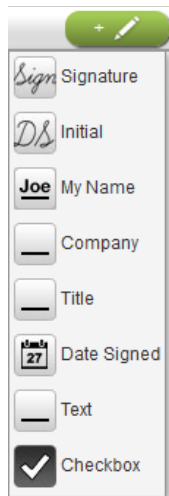
Note: The options available in the Envelope Settings depend on your account type and settings.

When you are done changing any Envelope Settings, click **Send**. The envelope is sent and you are returned to the DocuSign Member Console.

For more information about envelope settings, see the Adding Envelope Settings section in the *DocuSign Service User Guide* or online help.

What Your Recipient Sees

When recipients open documents sent for free-form signing they can place tags in the document as needed. Recipients use the **Add** menu at the top of the signing page to add a tag (Signature, Initial, My Name, Company, title, Date Signed, Text, or Checkbox) and to the documents.



To add a signature, initial or other information to a document, the recipient clicks the **Add** menu, selects the appropriate tag (a Signature, Initial, My Name, Company, title, Date Signed, Text, or Checkbox) and then clicks the appropriate location in the document to place the tag.

When the recipient places a Signature tag, they are asked to adopt their signature in the same way as guided signing.

The My Name, Company and Title tags use pre-filled recipient information, but can be modified by the recipient. The Date Signed tag uses the current date.

In cases where they need to add text into the document, they will click and drag a Text box to the document. After placing the Text box, they can type information directly into it.

The Checkbox places a checked box on the document.

Recipients can reposition a tag by clicking on the tag to select it and then dragging it to a new location. They can resize a tag by clicking on it to select it and then dragging the corner of the tag. They can remove a tag from the document by clicking on the tag and then clicking the delete icon on the tag.

After the recipient has placed all the tags in the document, they click **Finish** to complete signing. The envelope is completed or sent to the next recipient.

The recipient has completed signing and a message stating that they have completed signing and the documents have been received is displayed.

They are given the option of downloading a PDF copy of the documents, print a copy of the documents or view the completed document.

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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If you have any comments or feedback on our documentation, please send them to us at: Documentation@DocuSign.com.



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