



The global standard for eSignature

## Sending a Document with DocuSign

### Overview

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A key feature of the DocuSign® Service is the ability to quickly create and send documents for signing. This guide provides an overview of how to send a document for signing. The general steps in this process are:

- add documents
- add recipients
- add your subject and message for the envelope
- place tags for signatures and other information in the document
- preview 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

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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.

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 and the procedure for sending a document for guided signing is explained in this 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. For more information about sending a document for free-form signing, see the *Sending a Document for Free-Form Signing* quick start guide or the *DocuSign Service User Guide*.

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*.

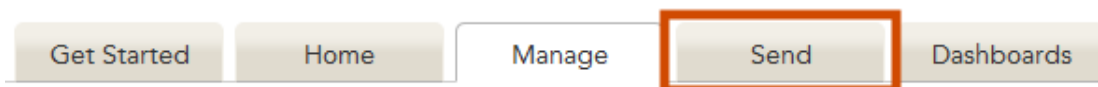
## Starting a New Envelope

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**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](mailto: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.

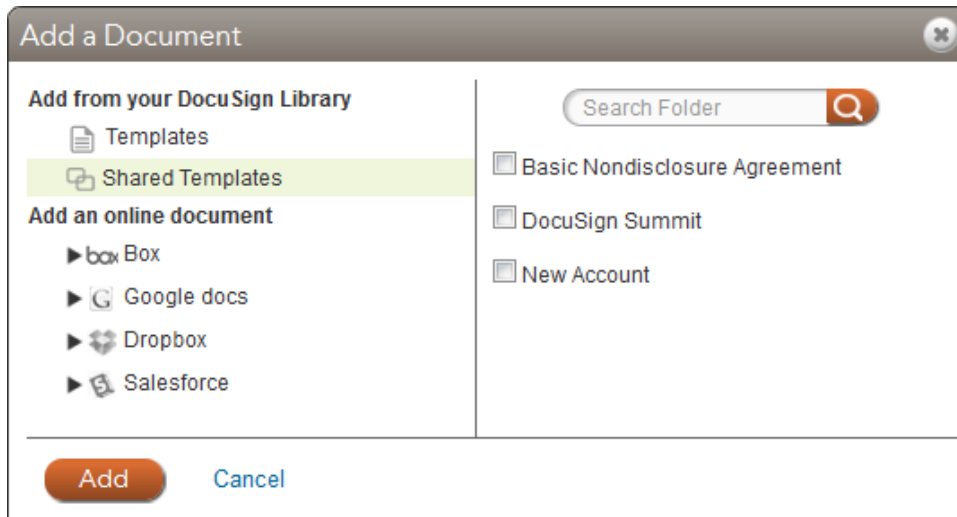
1. Select the source of your document:



- 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


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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

- or -

Add Bulk Recipient

**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

Kevin Smith

Add

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.

If you are not changing any Envelope Settings, click **Next** to begin tagging the documents.

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

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 **Next** to begin tagging the documents.

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

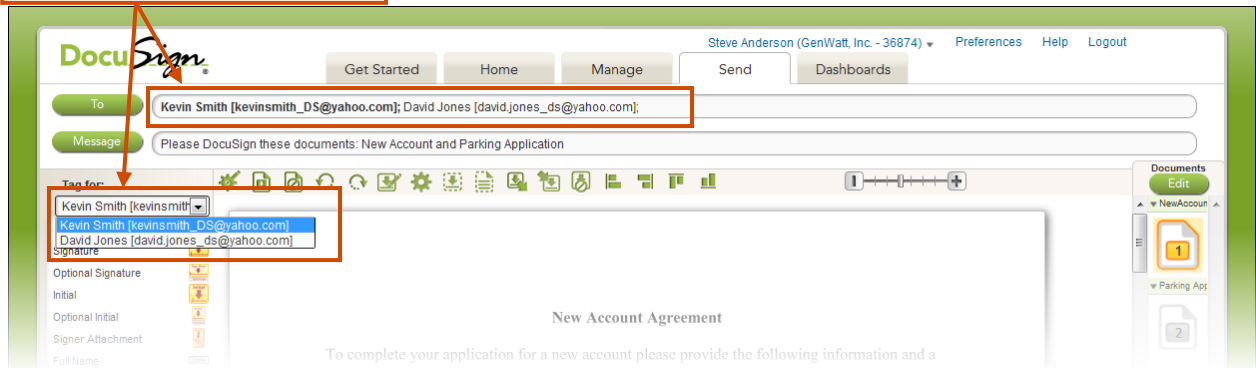
**Note:** Optionally, you can send the document for free-form signing instead of adding tabs to the document. If you are sending the document with free-form signing, click **Send**.

## Adding Tags to Documents

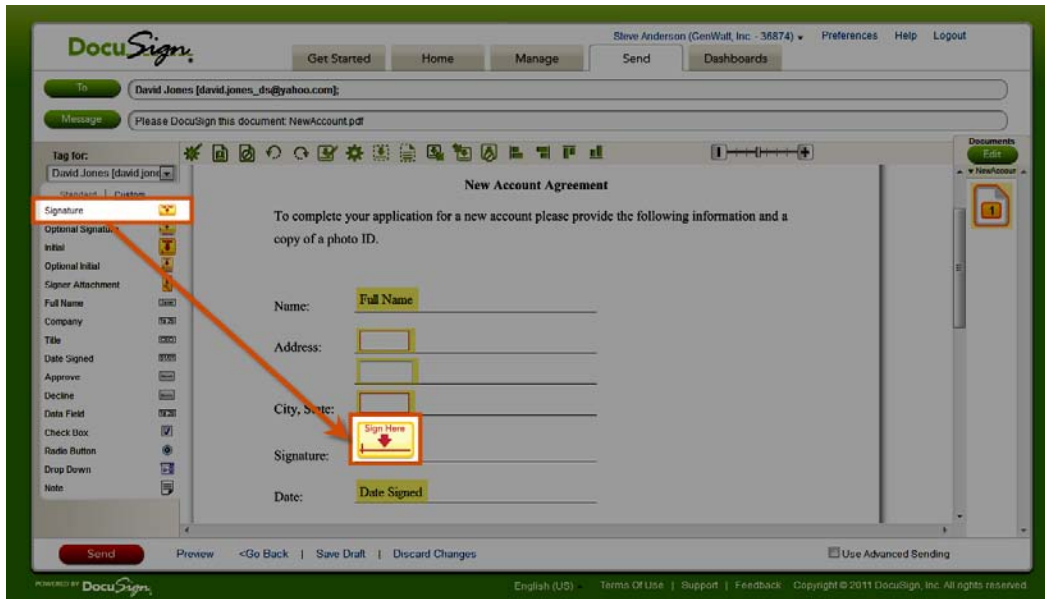
On the Add Tags page, you will add signature, initial and other information tags to help your signers know precisely what actions you want them to take, where in the document you want them to sign, initial or add information, and in what order.

1. To assign a signature, initial or other tag to a recipient, click the recipient's name on the **To** line or select the recipient name in the **Tag for:** list.

Select the recipient for tagging



Click and drag a tag from the palette and drop it on the document. You can also use the Tagging Toolbar to edit your envelope settings, documents and tags. The Tagging Toolbar is on the upper-portion of the Add Tags page, below the message field. For more information about DocuSign tags, how to change tag properties and using the Tagging Toolbar, refer to the DocuSign Tag Information section in the *DocuSign Service User Guide* or online help.



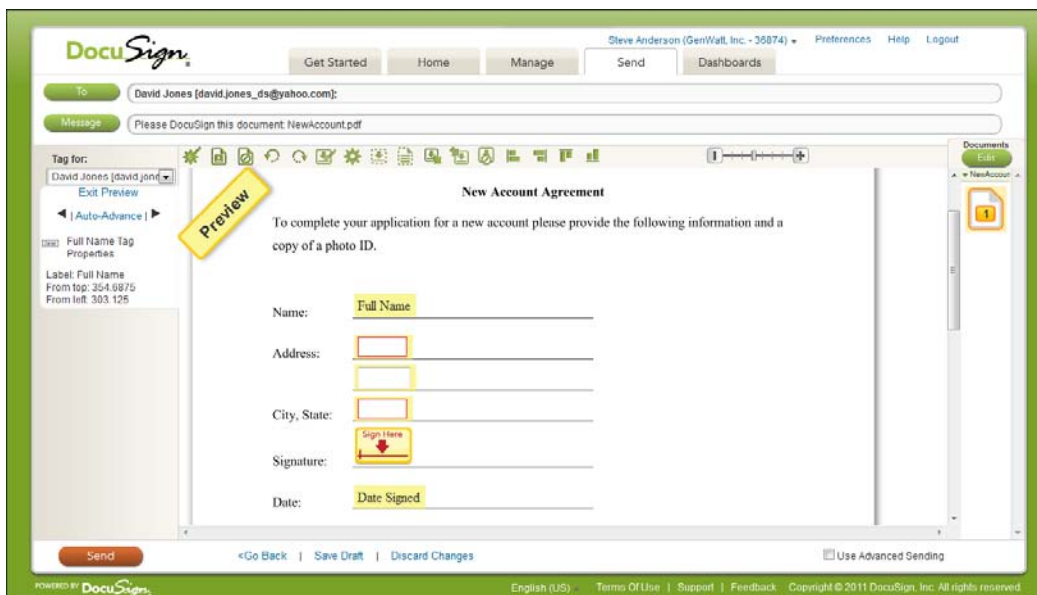
You can move to different pages in the document by scrolling through the document or by clicking on the appropriate page in the **Page Guide** shown on the right side of the console.

2. Continue placing tags for this recipient until you have added all the needed tags.
3. Repeat steps 1 and 2 for each recipient in the envelope.
4. Optionally, before sending an envelope, you can preview how your recipient will see the tags by clicking **Preview**.

You can also click **Send** to send the envelope.

## Reviewing and Sending an Envelope

1. Optionally, before sending an envelope, you can preview how your recipient will see the tags by clicking **Preview**.



Select the recipient you want to preview tags for and use the arrowhead icons to advance or move back. Alternately, you can click **Auto-Advance** to automatically cycle through the tags.

Click **Exit Preview** or **<Go Back** to return to the Add Tags page.

2. When you have added all the needed tags and are done previewing the envelope, click **Send**. The envelope is sent and you are returned to the DocuSign Member Console.

## For More Information

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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.

Version: DocuSign Release November 2011

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



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