

The fastest way to get a signature.™



## Getting Started

**Learn how to send a document, create a template, and send using a template in less than 10 minutes!**

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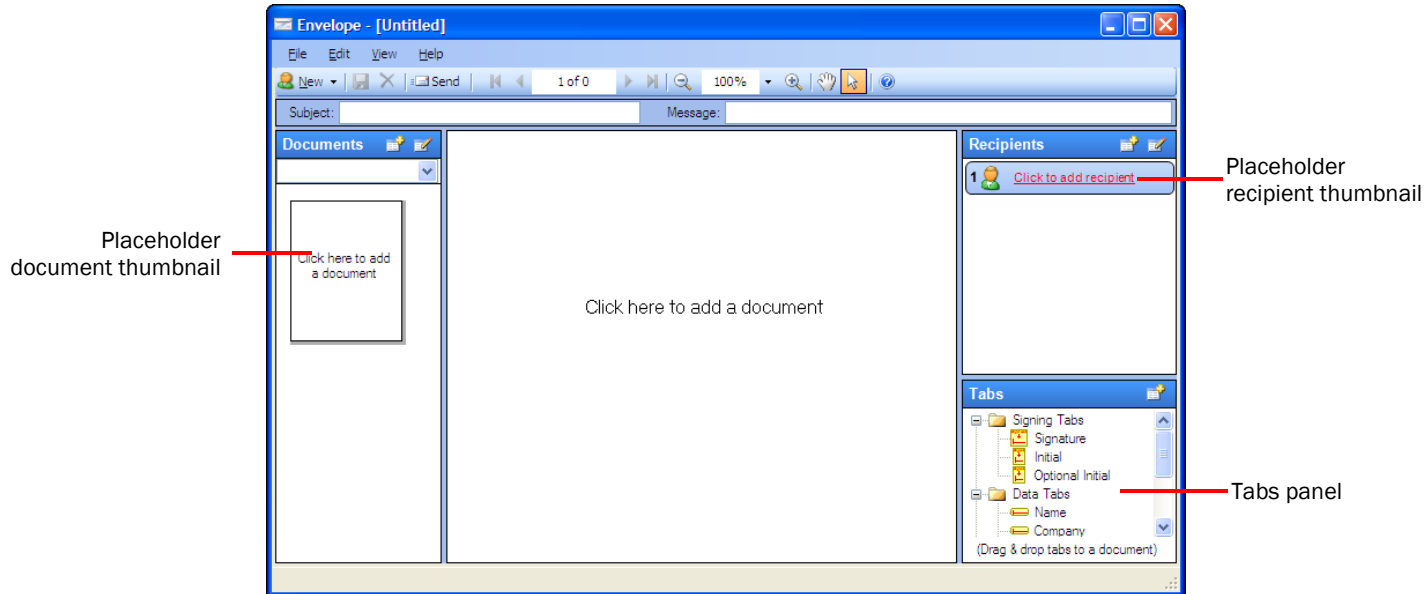
DocuSign Professional is a powerful web service that lets you send documents for signature quickly and easily. The service includes the DocuSign Professional Advanced desktop application which enables you to prepare documents for signature using versatile tools such as Templates, Custom Data Tabs, and an Address Book. It is complemented by the online interface known as your DocuSign Professional Member Console.

Some key tasks you will want to try out once you have set up your account and installed DocuSign Professional Advanced are described below. Detailed instructions are included in the *DocuSign Professional Advanced User Guide*.

# Send an Envelope in Five Easy Steps

## 1 Make an envelope

Open DocuSign Professional Advanced. On the toolbar, click **New > Envelope**. You can also **start** an envelope by printing a document from any application and selecting the DocuSign Professional printer.



## 2 Add a document

Click the placeholder document thumbnail on the left. Select **Browse to a document**, then click **Next**. Find the document on your computer or network. Click **Open**.

## 3 Add a recipient

Click the placeholder recipient thumbnail on the right. Use the **Type** drop list to select a recipient type. Type the recipient email address, name, and if desired a note. Click **Add**.

## 4 Place tabs

Highlight a recipient in your list of recipients. Then drag and drop yellow sticky tabs from the Tabs panel on the right onto the document in each place where you want the highlighted recipient to sign or provide information. Repeat this step for each recipient.

## 5 Identify your message

Enter the subject for the envelope and optionally provide a message that will be viewed by all recipients.

## Send!

### Click the Send button

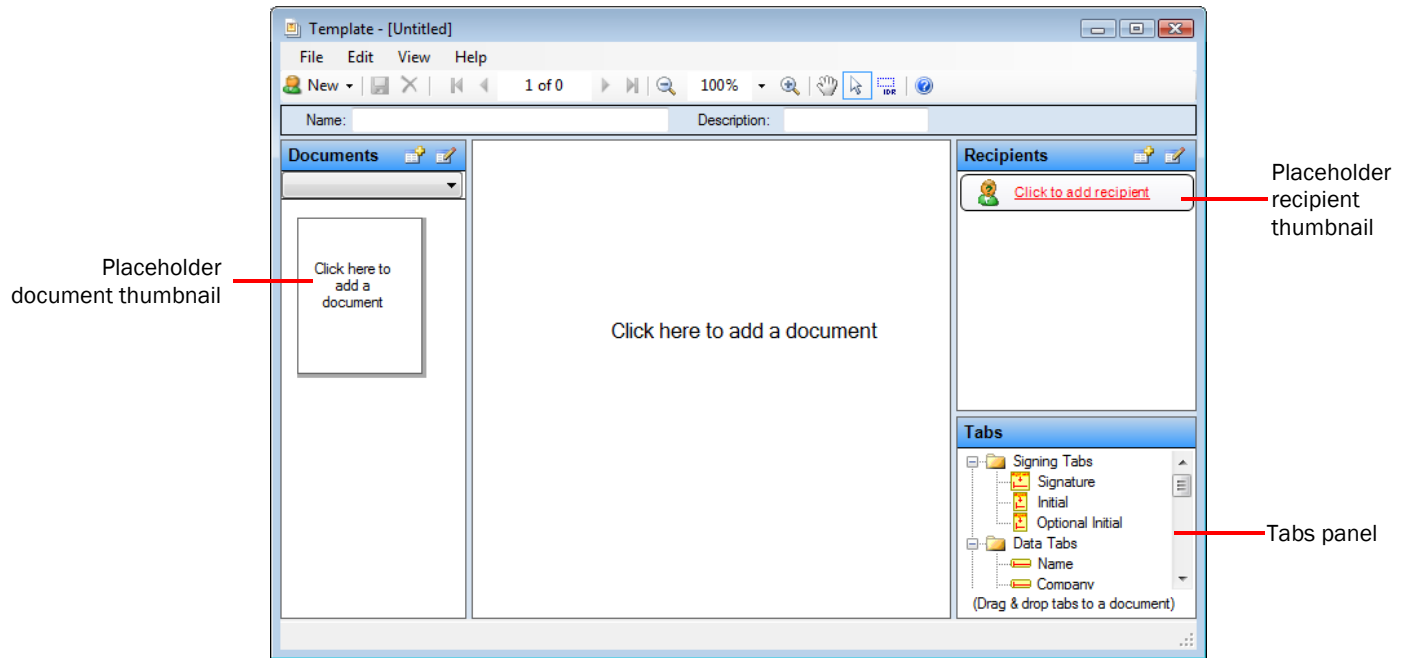
If you are online, DocuSign Professional Advanced sends your envelope immediately. If you are offline, the envelope is stored in your Outbox and sent automatically the next time you connect.

# Create a Template for Documents You Send Often

After mastering sending envelopes, you are ready to use templates. Templates let you “pre-tag” a document so that when you send, you only need to add the recipient details. Templates make sending an envelope even faster and more simple.

## 1 Make a template

On DocuSign Professional Advanced toolbar, click **New > Template**.



## 2 Add a document

Click the placeholder document thumbnail on the left. Find the document on your computer or network and click **Open**.

## 3 Add a role

With a template, you add roles instead of recipients. A role is a placeholder for the recipients that the sender adds when they use the template. For example, you could use the role “Borrower” on a loan application. Click the placeholder recipient thumbnail on the right. Type a role name for the signer. Use the **Type** drop list to select a recipient type. Click **Add**.

## 4 Place tabs

Highlight a role in your list of recipients. Drag and drop yellow sticky tabs from the Tabs panel on the right onto the document in each place where you want the highlighted recipient to sign or provide information. Repeat this step for each role in your recipient list.

## 5 Identify your template

Enter the name for the template and optionally provide a description of the template that will be viewed by a sender who uses the template.

## Save!

### Click the Save button

Your template is stored in your templates folder. Saved templates can be sent in an envelope OR can be applied to another document in an envelope.

# Send an Envelope using a Template

A template is really just a document with most of the work already done! When you add a template to an envelope you are automatically prompted to add recipient email and name.

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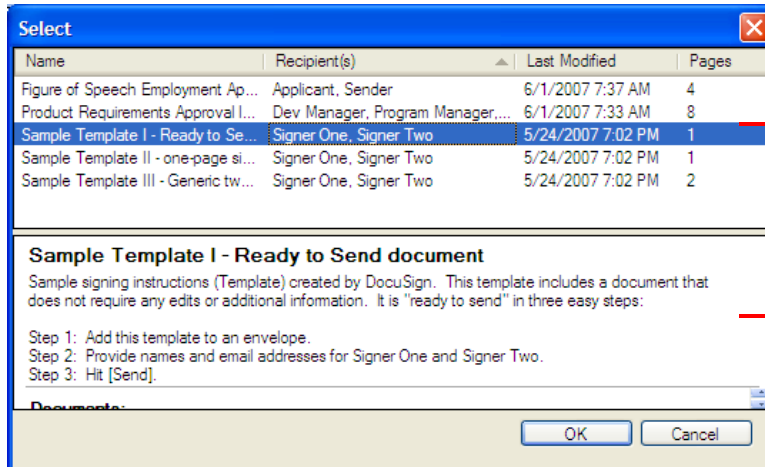
## Make an envelope

Open DocuSign Professional Advanced. On the toolbar, click **New > Envelope**.

2

## Add a template

Click the placeholder document thumbnail on the left. Click **Select a DocuSign template**, then click **Next**. Select a template from your list of available templates. Click **OK**.



List of templates in stored in the templates folder on your computer

Detail about the selected template to help you identify it in the list

3

## Add a recipient

When prompted to do so, click **Add Recipients**. Type the email address, name, and if desired a recipient note for each role and click **Add**.

4

## Identify your message

Enter the subject for the envelope and optionally provide a message that will be viewed by all recipients.

Send!

## Click the Send button

If you are online, DocuSign Professional Advanced sends your envelope immediately. If you are offline, the envelope is stored in your Outbox and sent automatically the next time you connect.

# Viewing the status of your Sent Items

Sent items appear in the Sent Items folder in DocuSign Professional Advanced. However, the Sent Items list is only a copy of what you sent from the desktop client. To view real-time status of your envelopes along with tools to correct, void, and manage your transactions, use the DocuSign Professional Member Console on the web.

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## Browse to your account

From the DocuSign Professional Advanced main view, select the **My Account** navigation folder. The client connects to and displays your DocuSign Professional Member Console.

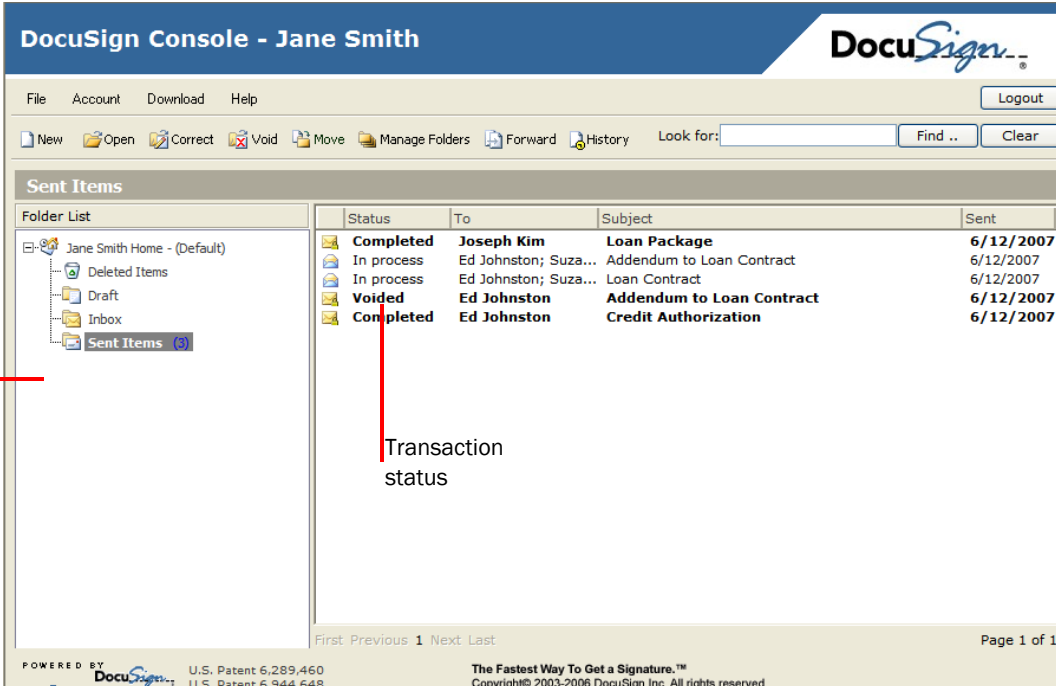
2

## View Sent Items

In the Folder List on the left hand side, click the **Sent Items** folder.

Status!

That's all there is to it. All transactions sent using DocuSign Professional Advanced appear in the DocuSign Professional Member Console Sent Items folder.



The screenshot shows the DocuSign Console interface for Jane Smith. The 'Sent Items' folder is selected in the Folder List on the left. The main area displays a table of transactions with columns for Status, To, Subject, and Sent date. A red line points from the 'Sent Items folder' label to the 'Sent Items' folder in the Folder List. Another red line points from the 'Transaction status' label to the 'Status' column in the table.

Status	To	Subject	Sent
Completed	Joseph Kim	Loan Package	6/12/2007
In process	Ed Johnston; Suza...	Addendum to Loan Contract	6/12/2007
In process	Ed Johnston; Suza...	Loan Contract	6/12/2007
Voided	Ed Johnston	Addendum to Loan Contract	6/12/2007
Completed	Ed Johnston	Credit Authorization	6/12/2007