

DocuSign for Outlook (Windows) v2.1

Published December, 2014

Overview

With DocuSign for Outlook, users can sign and return email attachments directly from the Outlook desktop client. The DocuSign for Outlook connector is available for Outlook 2007, Outlook 2010, and Outlook 2013.

Users with an existing account can log in with their DocuSign credentials. New users to DocuSign can signup for a free trial from within the Outlook connector. This free trial allows for an unlimited number of sign and returns, and up to 5 free DocuSign envelope sends.

This guide provides information on installing and signing documents with DocuSign for Outlook.

Installing DocuSign for Outlook	2
Signing Email Attachments with DocuSign for Outlook	2
FAQ	4
For More Information or Assistance	5

Installing DocuSign for Outlook

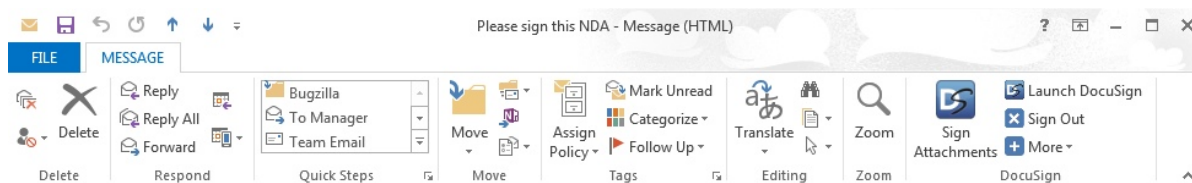
The DocuSign for Outlook package is available from the DocuSign Partner Solutions Showcase. Follow these steps to download and install the package:

1. To get the DocuSign for Outlook package:
 - a. Go to the [DocuSign for Outlook \(Windows\)](#) page on the DocuSign website.
 - b. Click **DOWNLOAD** to download the package as an .msi file to your computer.
2. To install the package:
 - a. Double click the .msi file to launch the DocuSign for Outlook Setup Wizard.
 - b. Follow the on-screen instructions.
 - c. Once DocuSign for Outlook has been successfully installed, click **Close** to exit the Setup Wizard.

DocuSign for Outlook is installed and the DocuSign group is added to your Outlook ribbon.

Signing Email Attachments with DocuSign for Outlook

When you open Outlook after DocuSign for Outlook has been installed successfully, you see the DocuSign group integrated into the application and email ribbon bar:



Supported File Formats

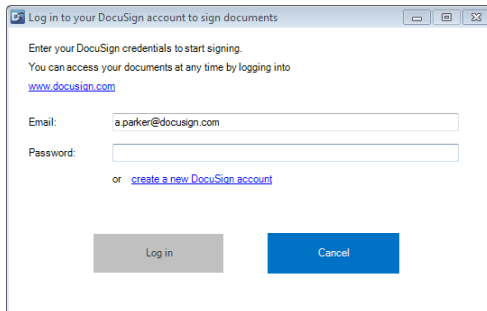
DocuSign for Outlook supports the following file formats for signing:

- **Document:** .pdf, .doc, .docx, .rtf, .txt
- **Spreadsheet:** .xls, .xlsx
- **Presentation:** .ppt, .pptx
- **Image:** .jpg, .png, .tiff, .gif
- **Webpage:** .htm, .html

To sign an attachment

1. Select the email with the attachment(s) you want to sign with DocuSign.
2. Click **Sign Attachments** on the Outlook ribbon bar.

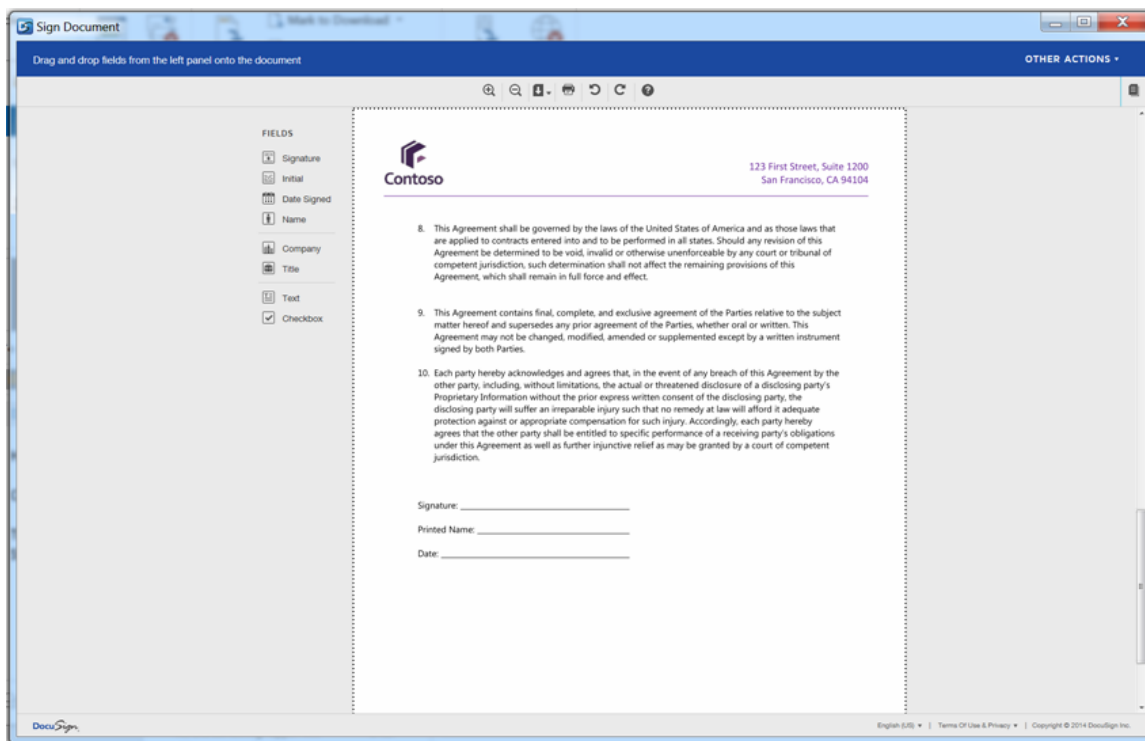
3. If this is the first time you are signing attachments, or you previously logged out of DocuSign, you are asked to log in or create a new account:



The screenshot shows a 'Log in to your DocuSign account to sign documents' dialog box. It contains the following text and elements:

- Header: 'Log in to your DocuSign account to sign documents'
- Instruction: 'Enter your DocuSign credentials to start signing. You can access your documents at any time by logging into www.docusign.com'
- Form fields: 'Email:' with the value 'a.parker@docusign.com' and 'Password:' with a masked input field.
- Link: 'or [create a new DocuSign account](#)'
- Buttons: 'Log in' (grey) and 'Cancel' (blue).

4. To add a signature, initial, or other information to the document, first click **Continue** to review and sign your document.
5. Click on the tag you want to place and then drag and drop the tag at the appropriate location in the document.

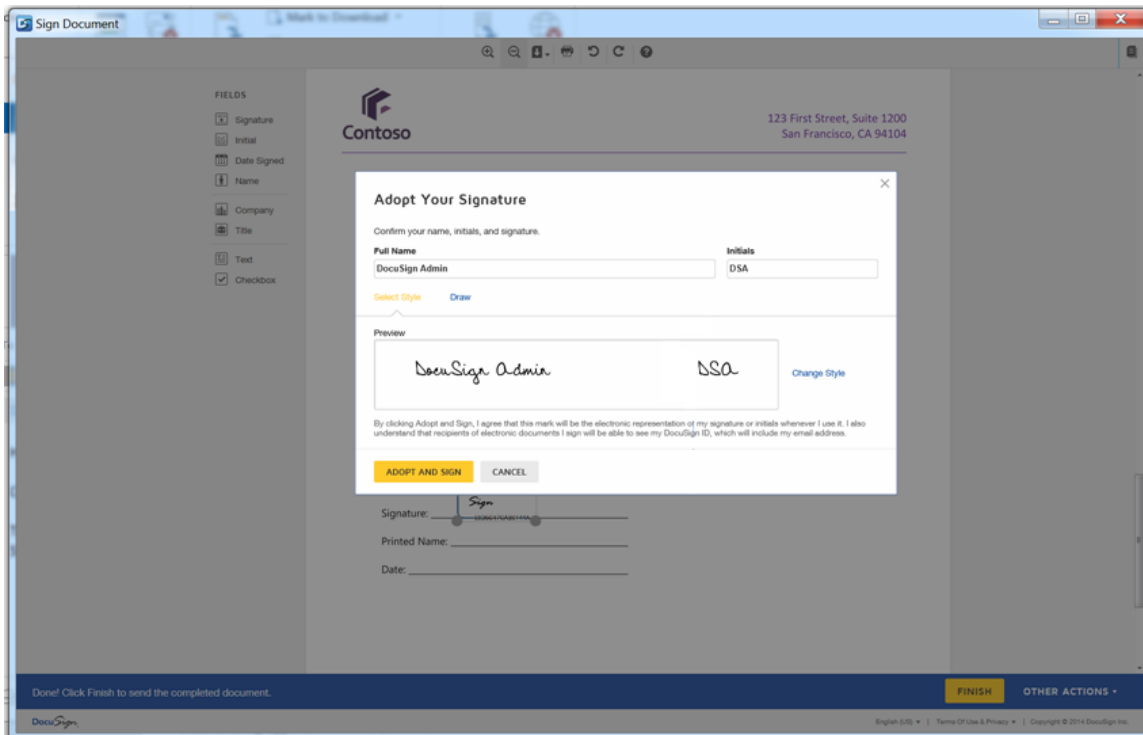


The screenshot shows the 'Sign Document' interface in a window. It features a 'FIELDS' panel on the left with the following options:

- Signature
- Initial
- Date Signed
- Name
- Company
- Title
- Text
- Checkbox

The main document area displays the 'Contoso' logo and address: '123 First Street, Suite 1200 San Francisco, CA 94104'. Below this is a list of numbered paragraphs (8, 9, 10) representing the document's terms. At the bottom of the document area, there are three fields for 'Signature:', 'Printed Name:', and 'Date:'. The interface also includes a toolbar with icons for search, zoom, and other actions, and an 'OTHER ACTIONS' menu in the top right corner.

- If it is the first time you are signing or initialing a document, you are asked to adopt your signature:



- After you have placed all the tags in the document, click **FINISH** to complete your document signing.
- Outlook generates a reply to the original sender with the signed document included as an attachment.

Note: The document is saved as a PDF, regardless of the original file format.

- The document is also saved in your DocuSign account. You can access your signed document at any time through your account, or from your sent email.

Note: You can quickly access your DocuSign account by clicking the **Launch DocuSign** button on the Outlook ribbon.

FAQ

How do I change the signature I adopted?

- In the DocuSign ribbon bar group, click **More** and select **Manage Identity**. The DocuSign Manage Identity page appears. Click **Edit** to adopt a new signature. You can also select **Privacy Settings** to adjust the information you share with other DocuSign users.

How do I uninstall DocuSign for Outlook?

- To uninstall DocuSign for Outlook from your PC, click **Start > Control > Programs**. Select **DocuSign for Outlook** and click **Uninstall**.

How do I give feedback on DocuSign for Outlook?

- In the DocuSign for Outlook ribbon bar group, click **More** and select **Give us your Feedback**. You can also send email to outlookfeedback@docusign.com.

I installed DocuSign for Outlook but I don't see the DocuSign group in the email ribbon bar? (Outlook 2013)

- In Outlook 2013, go to **File** and click **Slow and Disabled Add-Ins**. Under **DocuSign for Outlook**, select **Always enable this add-in**. The DocuSign group should now be visible in your Outlook application and email ribbon bars.

For More Information or Assistance

For more information or assistance, visit [DocuSign Support](#), the [DocuSign Community](#), docusign.com, or contact DocuSign Support.