



Classic DocuSign Experience User Guide

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Classic DocuSign Experience User Guide: Updated April 3, 2015

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

Summary of changes for this version:

- Clarified that when using the [Concealed Field feature](#) senders cannot see concealed information when viewing the PDF. But senders, or envelope owners if the envelope has been transferred, can use the Form Data option to download the information after the envelope is complete.

Table of Contents

Classic DocuSign Experience Overview	9
Launching the DocuSign Service	9
The Classic DocuSign Experience Components	9
<i>Manage Tab Navigation Panel Information</i>	11
<i>Dashboards</i>	13
<i>Reports</i>	13
<i>Running Reports</i>	23
<i>Customizing Reports</i>	24
<i>Scheduling Reports</i>	26
<i>Viewing and Editing Scheduled Report Information</i>	27
<i>Viewing Report Information</i>	28
Supported Languages.....	29
Logging Off	29
Sending Documents for Electronic Signing with DocuSign.....	30
Guided Signing and Free-Form Signing	30
Starting a New Envelope	30
Adding Documents to Your Envelope	31
Adding Recipients to Your Envelope.....	33
Adding Email Message Information.....	39
Adding Envelope Settings	40
Adding Tags to Documents.....	41
Reviewing and Sending an Envelope.....	43
DocuSign Tag Information	44
<i>Working with the Tagging Toolbar</i>	65
<i>Using Anchor Text</i>	67
<i>Creating Custom Tags</i>	67
<i>Adding a Custom Tag to a Document</i>	70
<i>Editing Custom Tags</i>	70
Advanced Sending Options	72
Using the Payment Processing Feature	72
<i>How It Works</i>	72
<i>Enabling Payment Processing in an Envelope</i>	73
<i>What Your Recipient Sees</i>	73

Using the Calculated Fields Feature	75
<i>Formula Tag Information and Building Your Formula</i>	75
<i>Adding Formula Tags to a Document</i>	77
<i>What Your Recipient Sees</i>	79
Electronic Notary	79
<i>How it Works</i>	80
<i>Restrictions for using Electronic Notary</i>	80
<i>Sending a Document with an Electronic Notary Request</i>	80
<i>Electronic Notary Certificate of Completion Information</i>	81
Requiring Digital Certificates during Signing	82
<i>Digital Certificate and Signature Information</i>	82
<i>Restrictions and Limitations</i>	82
<i>Sending an Envelope Requiring a Digital Certificate or Signature</i>	83
<i>What the Signer Sees</i>	85
<i>Viewing Certificate Information in Completed Envelopes</i>	87
Agent Managed Envelopes	89
<i>How it Works</i>	90
<i>Sending an Agent Managed Envelope</i>	92
<i>What a Manage Envelope Reviewer Sees</i>	93
<i>What an Address Recipients Reviewer Sees</i>	94
Using the Intermediary Recipient Feature	95
<i>How it Works</i>	95
<i>Sending an Envelope with an Intermediary Recipient</i>	95
<i>What an Intermediary Recipient Sees</i>	97
Using the Document Markup Feature	97
<i>Enabling the Document Markup Feature</i>	98
<i>Using the Markup Tool in a Document</i>	98
<i>Reviewing a Document with Document Markup Changes</i>	100
Using the Field Markup Feature.....	101
<i>Enabling Field Markup</i>	101
<i>Using Field Markup in a Document</i>	102
<i>Reviewing a Document with Field Markup Changes</i>	103
Using Conditional Fields	103
<i>How it Works</i>	104
<i>Adding Conditional Fields to a Document</i>	104

<i>What your Recipient Sees</i>	105
Adding Concealed Fields	106
<i>What Recipients See</i>	107
Using the Fax Out for Signature Feature.....	107
<i>How it Works</i>	108
<i>Sending an Envelope with the Fax Out for Signature Feature</i>	109
<i>Adding Fax Recipients to a Template</i>	110
<i>Fax Out History Events and Certificate of Completion Information</i>	111
Requesting Documents from your Recipients	112
Allowing your Recipients to Sign On Paper	113
Sending for In Person Signing	113
<i>How it Works</i>	113
<i>Creating and Sending an Envelope for In Person Signing</i>	114
Using the Sign In Each Location Feature	115
<i>How it Works</i>	115
<i>Sending an Envelope with Sign in Each Location</i>	115
Sending for Free-Form Signing.....	116
Using the Bulk Recipient Feature.....	117
<i>Building a Bulk Recipient File</i>	117
<i>Sending an Envelope with a Bulk Recipient</i>	119
<i>Creating a Template with a Bulk Recipient</i>	121
<i>Sending from a Template with Bulk Recipients</i>	122
<i>Bulk Recipient File Errors</i>	123
Using Document Visibility.....	124
<i>How Document Visibility Works</i>	124
<i>Using Document Visibility in an Envelope</i>	125
<i>Using Document Visibility in a Template</i>	126
Using Check Boxes and Radio Buttons.....	128
<i>When to use Check Boxes and Radio Buttons</i>	128
<i>Adding Check Boxes</i>	129
<i>Adding and Grouping Radio Buttons</i>	129
Using the Accessibility Support Feature.....	130
<i>How it Works</i>	131
<i>Sending an Envelope with Accessibility</i>	132
<i>Creating a Template with Accessibility</i>	133

<i>Exporting Reading Zone Information</i>	134
Advanced Sending Option	135
<i>Enabling Advanced Sending</i>	135
<i>Using the Advanced Sending Page</i>	135
Managing Envelopes and Folders.....	139
Searching for Envelopes.....	139
Viewing Envelope Status and Details.....	140
Viewing Envelope History	141
Opening an Envelope	141
Collecting Envelope Form Data.....	142
Viewing Changes to Envelope Data.....	142
<i>Viewing and Downloading Highlighted Data Changes</i>	142
<i>Viewing and Downloading Form Data Changes</i>	143
Voiding an Envelope	144
Resending an Envelope.....	145
Correcting an Envelope	145
Cloning an Envelope.....	146
Moving Envelopes between Folders	146
Adding a Folder	146
Deleting a Folder	146
Signing Documents with DocuSign.....	148
Basic Signing.....	148
<i>Email Notification</i>	148
<i>Signing Welcome</i>	149
<i>Signing Process</i>	150
<i>Other Actions</i>	157
<i>More Options</i>	158
<i>Free-Form Signing</i>	159
<i>Sign On Paper Option</i>	159
<i>Signer Attachments</i>	164
<i>Completing the Signing Process</i>	167
Authentication Options.....	169
<i>Access Code Authentication</i>	170
<i>SMS Authentication:</i>	170
<i>Phone Authentication:</i>	171

<i>ID Check:</i>	173
<i>LiveID or Any Social ID Authentication:</i>	174
Hosting an Electronic Notary Signing Session	174
Conducting an In Person Signing Session	179
Templates.....	182
Template Last Modified and Used Information	182
Sharing Existing Templates	182
Creating a New Template	183
<i>Adding Documents to a Template</i>	185
<i>Adding Recipient Roles</i>	186
<i>Adding Email Message Information and Envelope Settings</i>	191
<i>Adding Tags</i>	194
<i>Previewing and Saving the Template</i>	195
Editing a Template	195
Downloading and Uploading Templates.....	195
<i>Downloading Template Files</i>	195
<i>Uploading Template Files</i>	196
Using Templates.....	196
<i>Recipients and Routing</i>	198
<i>Adding Messages</i>	199
<i>Envelope Settings</i>	200
<i>Reviewing Tag Placement</i>	201
<i>Previewing and Sending an Envelope</i>	201
Template Matching and Intelligent Document Recognition.....	201
<i>Setting Intelligent Document Recognition Regions</i>	201
Automatic Template Matching Settings	202
User Account Preferences	204
Member Profile Section.....	204
<i>Names Available</i>	205
<i>Manage Identity</i>	205
<i>Your DocuSign ID Card</i>	209
<i>Electronic Notary Public Information</i>	210
<i>Managing Your Email Notifications</i>	212
<i>Social ID Login</i>	213
<i>Time Zones</i>	214

<i>Changing your Password</i>	215
<i>Changing your Email</i>	215
Member Options Section	216
<i>Managing your Address Book</i>	216
<i>Managing Custom Tags</i>	218
<i>Managing Template Matching</i>	218
Account Administration Section	219
<i>Envelope Publish</i>	219

Classic DocuSign Experience Overview

The Classic DocuSign® Experience web application provides you with an easy to use and flexible interface to DocuSign's core e-signature capabilities that let you and your customers quickly and easily sign the full range of documents online.

The section provides information on how to log on to the Classic DocuSign Experience web application, an overview of the application components and how to log off the web application.

Launching the DocuSign Service

1. Open your Internet browser and go to the [DocuSign website](https://www.docusign.com/) (https://www.docusign.com/) and click the **Login** button.

The DocuSign Login page appears.



2. Type your Email Address and Password, and then click **Login**.

Note: If your account uses Single Sign On, you are able to use your network credentials to log in to the DocuSign web application.

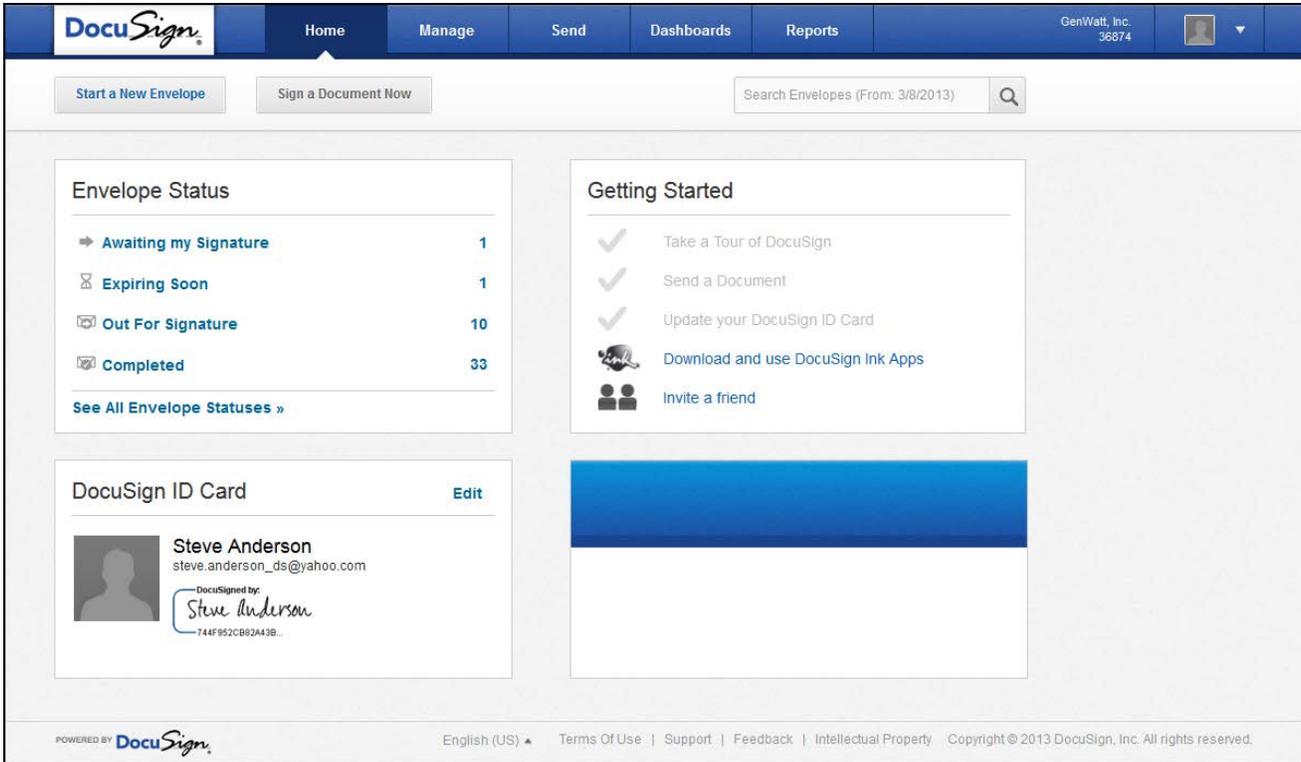
The Classic DocuSign Experience opens.

The Classic DocuSign Experience Components

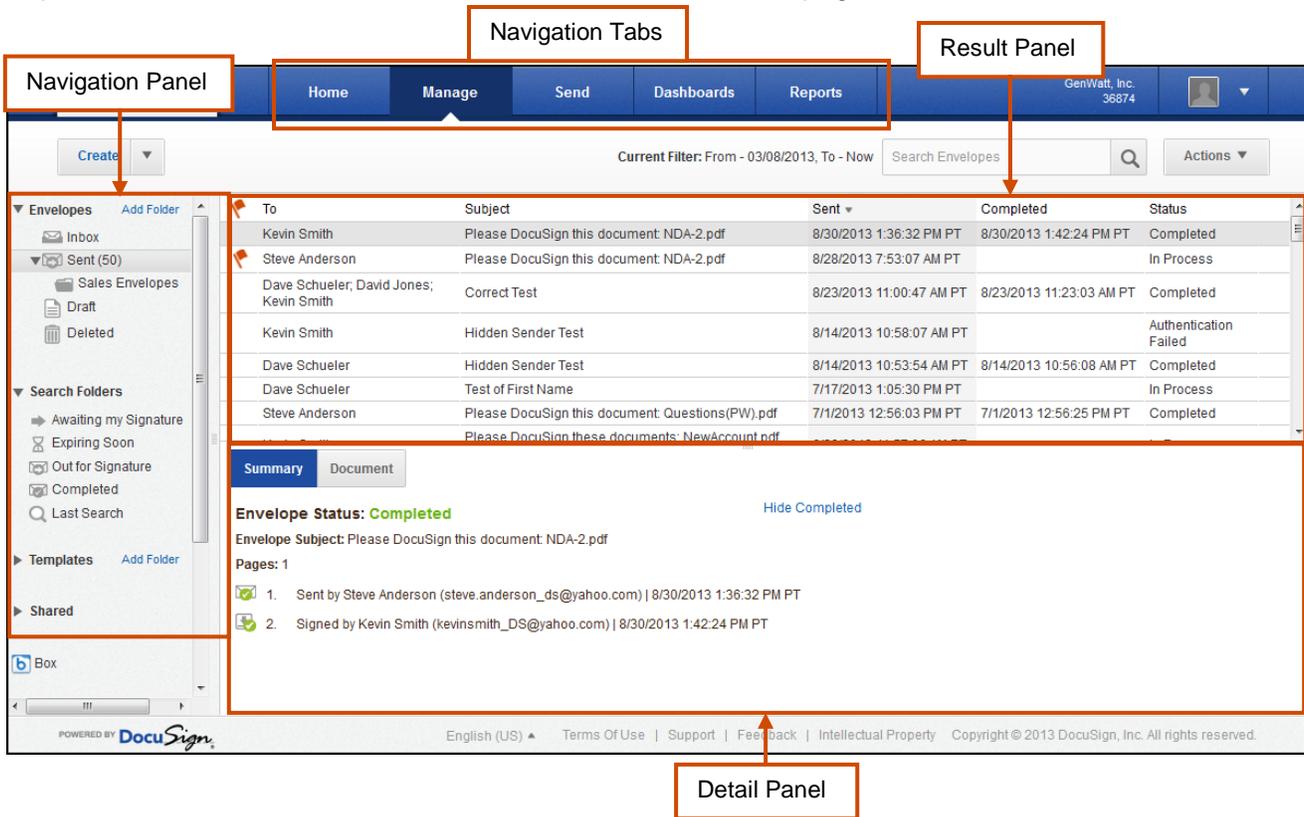
The Classic DocuSign Experience has been designed to be flexible and have a familiar look and feel. When you first log in to DocuSign you are taken to the Get Started or Home tab.

The Get Started tab provides users with information about DocuSign. This tab is the default tab used when you first log on to the application, unless **Start on Home tab** on this tab is selected.

The Home tab provides quick links to starting a new envelope, signing a document, Envelope Status, your ID Card and DocuSign Support information.



The following figure provides an overview of the different sections of the Classic DocuSign Experience. The different sections are described on the next page.



Navigation Tabs: These tabs are used to access different functions in the Classic DocuSign Experience. The navigation tabs are:

- **Home:** This tab provides quick links to Envelope Status, your ID Card and DocuSign Support information.
- **Manage:** This tab provides access to envelope folders, with all your envelopes, search folders and templates associated with your account. See [Manage Tab Navigation Panel Information](#) for information about what is shown by this tab.
- **Send:** This tab is used to create and send DocuSign envelopes. See [Sending Documents for Electronic Signing with DocuSign](#) for information about using this tab.
- **Dashboards:** This tab provides access to the visual reports of your activity within the account. See [Dashboards](#) for more information about this tab.
- **Reports:** This tab provide access to the DocuSign standard reports. It is only shown for accounts with DocuSign Professional, Business, Business Premium, Enterprise, DocuSign for Salesforce, DocuSign for REALTORS, and DocuSign for Real Estate plans. See [Reports](#) for information about using this tab.

Navigation Panel: The navigation panel is shown on the left side of the web application when the **Manage** and **Dashboards** tabs are selected. The navigation panel is used to select different information for display. The selected information is shown in the Results Panel.

Results Panel: The results panel is the main working area. This is the area where information is shown and where you work with envelopes, templates and other items.

Detail Panel: When an envelope or template is selected in the Results Panel, information about that envelope or template is shown in the Detail Panel. The information shown depends on the selected Detail Panel tab. The Detail Panel tabs are:

- **Summary:** For envelopes, this tab shows when the envelope was sent or created and provides a quick view of the envelope progress by showing the status of envelope recipients. For templates, this tab shows a list of recipients and when the template was created.
- **Document:** This tab provides a view of the documents in the selected envelope or template. If the envelope is completed, this view shows the information and signatures in the documents. You cannot take any actions on the documents from this view.
- **Dashboard:** This tab is only available when a report is selected from the Dashboard section in the navigation panel. This tab provides a view of the report associated with the current Results Panel view.

Manage Tab Navigation Panel Information

The Manage tab provides access to envelope folders, search folders and templates associated with your account. The folders, with envelopes, and templates are shown in the navigation panel when the Manage tab is selected. The folder sections are described below:

- **Envelopes:** This section provides access to your envelope folders. The standard folders are listed below, but you can add and delete additional folders. See [Managing Envelopes and Folders](#) for information about working with envelopes and adding and deleting folders. Folders that you add can be deleted, but the standard folders cannot be deleted.

The information displayed in the envelope folders is filtered by the **Current Filter** date, which is set to the last 180 days by default. See [Changing the Current Filter](#) for information on changing the date range for the filter.

The standard **Envelopes** folders are:

- **Inbox:** This folder has envelopes that are sent to you.
- **Sent:** This folder has the envelopes you have sent for signing.
- **Draft:** This folder has envelopes that you have started, but have not sent. Drafts are only held for 30 days before they are automatically removed from the folder.
- **Deleted:** This folder has envelopes that you have deleted. If you accidentally deleted an envelope, you can go to this folder to restore the envelope. Envelopes in this folder are removed from the folder during overnight processing. When all account users have deleted the envelope, it is purged from the DocuSign system.

When you select a folder, the envelopes in that folder are shown in the Results Panel. Selecting an envelope in the Results Panel displays the envelope information in the Detail Panel.

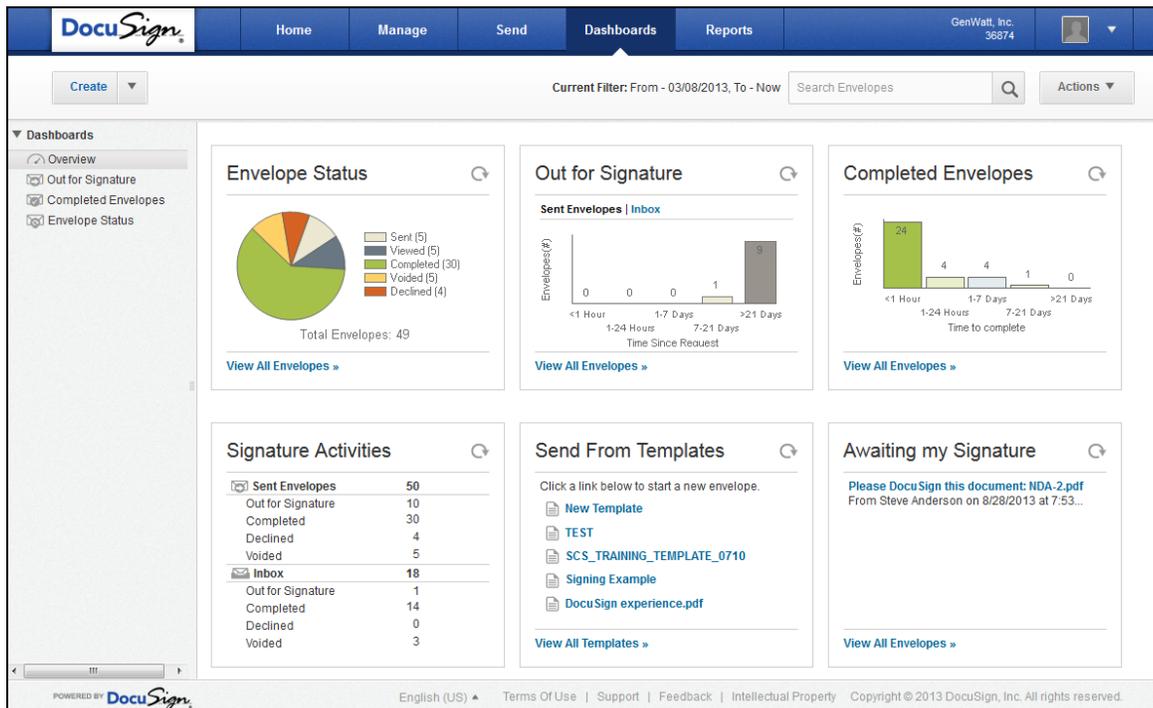
- **Search Folders:** These folders contain pre-set envelope filters. The filters are common envelope searches, including your Most Recent search, and when selected shows envelopes that meet the filter search criteria in the Results Panel.
- **Templates:** This section provides access to template folders. Depending on your account access, the folders listed can include your templates, shared templates, and PowerForms. You can add new folders to this segment and folders you add can be deleted.

The **My Templates** folder contains the templates you have created or own. The **Shared Templates** folder has the templates that you have shared, that have been shared with Groups you belong to or shared directly with you. If you are an administrator for your account, you will see an additional **All Account Templates** folder that has all the templates, shared or unshared, in the account.

- **Shared:** This section provides access to the folders of shared users for your account. Depending on your account access, you might not have any folders listed here.

Dashboards

The Dashboards tab provides access to visual reports of your activity with the account.



When you initially click the Dashboards tab, all the visual reports are shown in the Results Panel. You can scroll through the reports and select items directly from the reports. The information displayed in the reports is filtered by the **Current Filter** date, which is set to the last 180 days by default. See [Changing the Current Filter](#) for information on changing the date range for the filter.

There are several pre-formatted report filters available in the Dashboards tab. These report filters provide quick access to commonly requested envelope information. Each of the report filters are described below:

- **Overview:** This option shows all the visual reports and reporting options.
- **Out for Signature:** This option shows a list of envelopes that have been sent, but not signed, in the Results Panel, with a bar chart aging report showing the number of days since an envelope was sent for signature in the Detail Panel. Optionally, you can show the aging report for envelopes awaiting your signature.
- **Completed Envelopes:** This option shows a list of envelopes that are completed in the Results Panel and a bar chart Time To Complete report showing the number of days between sending an envelope and completing the envelope in the Detail Panel.
- **Envelopes Status:** This option shows a list of envelopes that have been sent in the Results Panel and a pie chart showing the status of the envelopes in the Detail Panel.

Reports

The DocuSign reporting feature provides an easy way for DocuSign users and account administrators to see information about their account. Reports can be run by account users and account administrators. When users run reports, they will only see their personal information. When users with administrator permission run reports, they will see group and account level information.

The reporting data is available in complete days and might be delayed up to 24 hours. So recently sent envelopes might not appear in your reports.

Report Descriptions and Settings

When running a report, you can use the default settings or modify the report settings. All reports use a default time setting of 'Month to Date' and all other settings of 'Any.'

The Standard Reports are divided into three categories; the reports in each category are described below.

Envelope Reports:

- Envelope Report – This report lists of all envelopes for the selected report parameters. Each report row is for a different envelope and shows envelope status, the sender, the recipient(s) and activity information for the envelope.

The available information columns for the Envelope Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Envelope Report Column	Description
Subject*	The Envelope Subject Line.
Status*	Envelope Status when the report was generated. <ul style="list-style-type: none"> • Sent: This status is used when the email notification has been sent to at least one recipient. The envelope remains in this state until all recipients have viewed the envelope. • Delivered: This status is used when <u>all</u> recipients have opened the envelope. This does not signify an email delivery of an envelope. • Completed: The status is used when the envelope has been completed by all the recipients. • Declined: The status is used when envelope has been declined by one of the recipients. • Voided: The status is used when envelope has been voided by the sender.
Sender*	The sender's name.
Recipient*	The recipient's name. If there is more than one recipient "multiple" appears in this column.
Sent On*	The date and time the envelope was first sent.
Last Activity*	The date and time of the last Status change for the envelope.
Completed On*	The date and time the envelope was completed.
Completion Time*	The time from when the envelope was first sent until it was completed.
Created Date	The date and time the envelope was created
Custom Fields	The envelope custom field information for the envelope.
Declined Date	The date and time the envelope was declined.
Delivered Date	The data and time the envelope status changed to

	Delivered.
Envelope ID	The DocuSign envelope ID.
EOD Document Description	The eOriginal document description.
EOD Document Name	The eOriginal document name.
EOD Document Profile ID	The document profile ID set by eOriginal when the document is successfully vaulted.
EOD Status	The eOriginal document status.
EOD Transaction ID	The transaction ID set by eOriginal when the document is successfully vaulted.
EOD Transaction Name	The transaction name set by eOriginal when the document is successfully vaulted.
Expiration Date	The date the envelope will expire. This date is based on expirations settings for the envelope or default account settings.
Last Sent Date	The date and time the envelope was last sent. If there are recipients in different routing orders, this time will change when the envelope is sent to recipients in the next routing order.
# of Authenticated Recipients	The number of recipients that successfully passed authentication.
# of Completed Signatures	The number of signatures in the completed documents.
# of Documents	The number of documents in the envelope
# of Pages	The number of pages in the envelope
# of Recipients	The number of recipients for the envelope
# of Signers	The number of signers for the envelope
Reason For Declining	The recipient's reason for declining the envelope.
Reason for Voiding	The reason for voiding an envelope, as entered by the person that voided the envelope.
Sender Company Name	The sender's company as shown in their ID card.
Sender Country	The sender's country.
Sender Email	The sender's email address.
Sender IP Address	The sender's IP address.
Sender Job Title	The sender's job title as shown in their ID card.
Sender User ID	The DocuSign ID for the sender.
Signed Date	The date and time the envelope was signed.
Number of Remaining Signatures	The total number of signatures remaining for the envelope.
Voided Date	The data and time the envelope was voided.

- Envelope Recipient Report – This report is similar to the Envelope Report, but provides additional information about the recipients, their place in the routing order, how they were authenticated, and their actions.

The available information columns for the Envelope Recipient Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Envelope Recipient Report Column	Description
Subject*	The Envelope Subject Line.
Status*	Envelope Status when the report was generated. <ul style="list-style-type: none"> • Sent: This status is used when the email notification has been sent to at least one recipient. The envelope remains in this state until all recipients have viewed the envelope. • Delivered: This status is used when <u>all</u> recipients have opened the envelope. This does not signify an email delivery of an envelope. • Completed: The status is used when the envelope has been completed by all the recipients. • Declined: The status is used when envelope has been declined by one of the recipients. • Voided: The status is used when envelope has been voided by the sender.
Sender*	The sender's name.
Recipient*	The recipient's name. If there is more than one recipient in the same routing order for an envelope, the Subject, Status, and Sender columns is only shown for one recipient and blank for the others in the routing order.
Routing Order*	The recipient's routing order.
Action*	The last status action for the recipient.
Sent On*	The date and time the envelope was first sent.
Completed On *	The date and time the envelope was completed.
Completion Time*	The time from when the envelope was first sent until it was completed.
Account ID	The DocuSign Account ID for the sending account.
Created Date	The date and time the envelope was created.
Custom Field	The envelope custom field information for the envelope.
Declined Date	The date and time the envelope was declined.
Declined Reason	The recipient's reason for declining the envelope.
Envelope ID	The DocuSign envelope ID.
Envelope Voided Reason	The reason for voiding an envelope, as entered by the person that voided the envelope.
Time Envelope Sent	The date and time the envelope was sent to this recipient. This can be different than the Sent On date and time depending on the recipient's routing order.
IP Address	The Signer's IP address.
# of Sends	The number of times the envelope was sent to the recipient.
Reassign Reason	The recipient's reason for reassigning the envelope.
Recipient Company Name	The recipient's company name.

Recipient Country	The recipient's country.																		
Email	The recipient's email address.																		
Recipient ID	The DocuSign ID for the recipient.																		
Recipient Template Role Name	The template role name associated with the recipient. If a template was not used, this will be blank.																		
Recipient Title	The recipient's title.																		
Recipient Type	The recipient's action type. The information shown in the column is slightly different than the information shown in the DocuSign web application when sending. The <table border="0"> <thead> <tr> <th><u>Column Display is:</u></th> <th><u>Application Display is</u></th> </tr> </thead> <tbody> <tr> <td>Agent</td> <td>Address recipients</td> </tr> <tr> <td>Carbon Copy</td> <td>Receive a copy</td> </tr> <tr> <td>Certified Delivery</td> <td>Acknowledge receipt</td> </tr> <tr> <td>Editor</td> <td>Manage envelope</td> </tr> <tr> <td>In Person Signer</td> <td>Sign in person</td> </tr> <tr> <td>Intermediary</td> <td>Manage recipients</td> </tr> <tr> <td>Signer</td> <td>Sign</td> </tr> <tr> <td>Signing Host</td> <td>Sign in person host</td> </tr> </tbody> </table>	<u>Column Display is:</u>	<u>Application Display is</u>	Agent	Address recipients	Carbon Copy	Receive a copy	Certified Delivery	Acknowledge receipt	Editor	Manage envelope	In Person Signer	Sign in person	Intermediary	Manage recipients	Signer	Sign	Signing Host	Sign in person host
<u>Column Display is:</u>	<u>Application Display is</u>																		
Agent	Address recipients																		
Carbon Copy	Receive a copy																		
Certified Delivery	Acknowledge receipt																		
Editor	Manage envelope																		
In Person Signer	Sign in person																		
Intermediary	Manage recipients																		
Signer	Sign																		
Signing Host	Sign in person host																		
Sender Account ID	The sender's account ID.																		
Sender Email	The sender's email address.																		
Sender IP Address	The sender's IP address.																		
Sender User ID	The DocuSign ID for the sender.																		
Signature Type	This shows how the signer's signature was applied to the envelope. If the recipient is not a Signer or In Person Signer, this will be blank.																		
Sign Date	The date and time the recipient completed signing the envelope.																		
Signed on Mobile	Shows if the signer used a mobile device during signing.																		
Signed on Paper	Shows if the signer used the sign on paper option.																		
Status Changed Date	The date and time of the last status change for the envelope.																		
Terminal Status Date	The date and time the envelope was completed, voided, or declined.																		
Time To Deliver	The time from when the envelope was first sent until the recipient viewed the envelope.																		
User ID	If the recipient is also a DocuSign user, this is the recipient's DocuSign user ID.																		
View Date	The date and time the recipient viewed the envelope.																		

- Envelope Status Report – This report provides envelope totals sorted by status for the selected report parameters. Each report row is for a different envelope status and shows the total envelope with that status, the number of unique senders, the total recipients, the total signers, the total documents and total pages.

The available information columns for the Envelope Status Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Envelope Status Report Column	Description
Status*	The envelope status. Each row in the report has a different status.
Total Envelopes*	The total number of envelopes with this status
Unique Senders*	The total number of different senders for all envelopes with this status.
Total Recipients*	The total number of recipients for all envelopes with this status.
Total Signers*	The total number of signers for all envelopes with this status.
Total Documents*	The total number of documents for all envelopes with this status.
Total Pages*	The total number of pages for all envelopes with this status.

- Envelope Velocity Report – This report provides information about envelope completion times for the selected report parameters.

The available information columns for the Envelope Velocity Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Envelope Velocity Report Column	Description
Completion Time*	The span of time from when the envelope was first sent until it was completed. Each row in the report covers a different time span.
Total Envelopes*	The total number of envelopes completed in this time span.
Unique Senders *	The total number of different senders for all envelopes in this time span.
Total Recipients*	The total number of recipients for all envelopes in this time span.
Total Signers *	The total number of signers for all envelopes in this time span.
Total Documents*	The total number of documents for all envelopes in this time span.
Total Pages*	The total number of pages for all envelopes in this time span.

- Envelope Volume Report – This report provides information about envelopes sent, completed, corrected, declined and voided, along with the average completion time, for the selected report parameters.

Note: If the selected time period interval for the Envelope Volume Report includes the shift to or from Daylight Savings Time, the Period Start and Period End times might appear to be inaccurate. This is a known issue and no statistical data has been lost or changed.

The available information columns for the Envelope Volume Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Envelope Volume Report Column	Description
Period Start*	The date and time the measured time period starts.
Period End*	The date and time the measured time period ends.
Envelopes Sent*	The total number of envelopes sent during the time period.
Envelopes Completed*	The total number of envelopes completed during the time period.
Envelopes Declined*	The total number of envelopes declined during the time period.
Envelopes Voided*	The total number of envelopes voided during the time period.
Average Time To Complete*	The average time from when envelopes were sent until they were completed during the time period.

- Envelope Authentication Report – This report provides details for all recipients with authentication checks for the selected report parameters. Each report row is for a different recipient and shows the recipient information, authentication check information, and the result of the authentication check.

The available information columns for the Envelope Authentication Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Envelope Authentication Report Column	Description
Event Date*	The date the authentication event occurred.
Envelope ID*	The DocuSign envelope ID.
Recipient Name*	The recipient's name.
Recipient Email*	The recipient's email address.
Authentication Category*	The general authentication category for the authentication type used by the recipient. The categories and associated authentication types are: <ul style="list-style-type: none"> Access Code = Access Code ID Check = iAuth, iAge, iPatriot, and STAN Phone = Phone Authentication and SMS Authentication PKI Cert = PKI Certificate Social ID = Google, AnySocialID, Salesforce, LinkedIn, Facebook, Live ID, Yahoo, Twitter, OpenId WURFL = WURFL Device Detection Other = Any non-established type
Authentication Type*	The specific type of authentication check used for the recipient. The possible values are: Access Code, AnySocialID, Facebook, Google, iAge, iAuth,

	iPatriot, LinkedIn, Live_ID, OpenId, PhoneAuth, PKICert, Salesforce, SMSAuth, STAN, Twitter, WURFL_DeviceDetection, and Yahoo.
Authentication Success*	The authentication result where True = passed authentication and False = failed authentication.
Sender User ID	The DocuSign ID for the sender.
Sender Name	The sender's name.
Recipient ID	The DocuSign ID for the recipient.
Recipient User ID	If the recipient is also a DocuSign user, this is the recipient's DocuSign user ID.
Vendor Return Code	The vendor's result code associated with this authentication check. Note that this is typically only populated for failed authentication checks.
Vendor Failure Reason	The vendor's failure reason associated with this authentication check. Note that this is only populated for failed authentication checks.

Recipient Reports:

- Recipient Activity Report – This report provides activity information for envelope recipients for the selected report parameters. Each report row is for a different recipient and shows the number of envelopes received, signed, not signed, a completion rate and the average time for that recipient to complete an envelope.

The available information columns for the Recipient Activity Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Recipient Activity Report Column	Description
Recipient*	The recipient's name.
Email*	The recipient's email address.
Envelopes Received*	The number of envelopes this recipient received.
Envelopes Requiring Signature*	The number of envelopes that this recipient was required to sign.
Envelopes Not Signed*	The number of envelopes that this recipient was required to sign, but has not signed.
Completion Rate*	The percentage of envelopes completed by the recipient.
Average Time to Complete*	The average time from when envelopes were sent until they were completed by the recipient.

- Recipient Authentication Report – This report provides information about the authentication methods used to verify the identity of users for the selected report parameters.

Note: In some cases, records may be reported showing no authentication activity. This is a known issue and will be addressed in the future.

The available information columns for the Recipient Authentication Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Recipient Authentication Report Column	Description
Recipient*	The recipient's name.
Email*	The recipient's email address.
Access Code Attempts*	The total number Access Code attempts made by the recipient for the report period.
Access Code Failures*	The total number Access Code failures for the recipient for the report period.
ID Check Attempts*	The total number ID Check attempts made by the recipient for the report period.
ID Check Failures*	The total number ID Check failures for the recipient for the report period.
Phone Attempts*	The total number Phone Authentication attempts made by the recipient for the report period. This total includes both Phone Authentication and SMS Authentication attempts.
Phone Failures*	The total number Phone Authentication failures for the recipient for the report period. This total includes both Phone Authentication and SMS Authentication failures.

Usage Reports:

Note: User, Group and Account-Wide Activity Reports and the Account Authentication Report are only available to administrators.

- User Activity Report – This report provides activity information for account users for the selected report parameters. Each report row is for a different account user and shows the number of envelopes sent, completed, the number of templates created and the last envelope activity for each user.

The available information columns for the User Activity Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

User Activity Report Column	Description
Name*	The user's name.
Email*	The user's email address.
Envelopes Sent*	The total number of envelopes sent by this user during the report period.
Envelopes Completed*	The total number of envelopes sent by this user that were completed during the report period.
Templates Created*	The total number of templates created by this user during the report period.
Last Envelope Sent *	The date and time the user last sent an envelope.
Sender User ID	The DocuSign ID for the user.

- Group Activity Report – This report provides activity information for groups in your account for the selected groups and timeframe. The report shows the number of users in each group, the number of envelopes sent, the number of envelopes completed, the number of templates created and the last envelope activity for a member of the group.

The available information columns for the Group Activity Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Group Activity Report Column	Description
Group*	The group name.
Users*	The number of users in the group.
Envelopes Sent*	The total number of envelopes sent by users in the group during the report period.
Envelopes Completed*	The total number of envelopes sent by users in the group that were completed during the report period.
Templates Created*	The total number of templates created by users in this group during the report period.
Group ID*	The DocuSign group ID.
Last Envelope Sent*	The date and time any user in the group last sent an envelope.

- Account Activity Report – This report provides activity information for the account for the selected timeframe. The report shows the number of users in the account, the number of envelopes sent, the number of envelopes completed, the number of templates created and the last envelope activity for the account.

The available information columns for the Account Activity Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

Account Activity Report Column	Description
Users*	The total number of users in the account.
Envelopes Sent*	The total number of envelopes sent from the account during the report time period.
Envelopes Completed*	The total number of envelopes sent from the account that were completed during the report time period.
Templates Created*	The total number of templates created for the account during the report time period.
Last Envelope Sent*	The date and time any account user last sent an envelope.

- Account Authentication Report – This report provides overall authentication check information for the account for the selected timeframe. The report shows the number of authentication check successes and failures for each authentication type for envelopes sent by the account.

The available information columns for the Account Authentication Report are shown below. Columns marked with an asterisk (*) are default report settings. Columns can be added or removed from the report by customizing the report.

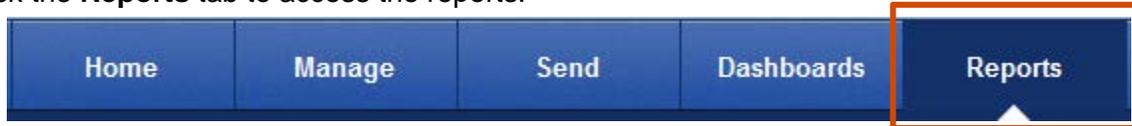
Account Authentication Report Column	Description
Authentication Category*	The general authentication category for the authentication types. The categories and associated authentication types are:

	<ul style="list-style-type: none"> • Access Code = Access Code • ID Check = iAuth, iAge, iPatriot, and STAN • Phone = Phone Authentication and SMS Authentication • PKI Cert = PKI Certificate • Social ID = Google, AnySocialID, Salesforce, LinkedIn, Facebook, Live ID, Yahoo, Twitter, OpenId • WURFL = WURFL Device Detection • Other = Any non-established type
Authentication Type*	<p>The specific type of authentication check. The possible values are:</p> <p>Access Code, AnySocialID, Facebook, Google, iAge, iAuth, iPatriot, LinkedIn, Live_ID, OpenId, PhoneAuth, PKICert, Salesforce, SMSAuth, STAN, Twitter, WURFL_DeviceDetection, and Yahoo.</p>
Successes*	The number of successful authentication events.
Failures*	The number of failed authentication events.

Running Reports

Reports can be run by account users and account administrators. User run reports only return information associated with their envelopes, while administrator run reports can return information for all account users and envelopes.

1. Click the **Reports** tab to access the reports.



2. In the list of standard reports, on the left, or My Reports, on the right, find the report you want to run and click on the report name.

The report runs with the default settings and columns. For more information on the actions that can be taken with completed reports, see [Viewing Report Information](#).

The screenshot displays the Reports interface. On the left, under the 'ENVELOPES' section, there are five report options: Envelope Report, Envelope Recipient Report, Envelope Status Report, Envelope Velocity Report, and Envelope Volume Report. On the right, under the 'MY REPORTS' section, there are three report options: Envelope Report, Envelope Report 2, and Envelope Volume Report YTD. Each report entry includes a description and 'Edit | Schedule' links.

Customizing Reports

All reports can be customized for a one-time use or saved to the My Reports section of the Reports tab for future use. Reports saved in the My Reports section can be run, edited, and scheduled in the same manner as standard reports. Each user can have up to 100 customized reports saved in My Reports.

To customize a report, click **Edit** adjacent to the report name to go to the Customize page. After selecting and entering the parameters and appearance options, click **Run Report** to view the report or **Save to My Reports** to save the report in My Reports.

If you are editing a saved report, you can make changes and save them by clicking **Update this Report with these changes**. Additionally, you can delete the report by clicking **Remove from My Reports**.

The information that can be changed for a report is described below.

Report Title – This parameter sets the title shown for the report. The default setting is the standard report name. If you are saving the report, the Report Title cannot be the same as any other title. The title can be up to 128 characters long and cannot contain the special characters / \ : ? “ * < > and |.

Description – This provides a short description of the report. The description can be 140 characters long.

Parameter Options:

The parameters available vary depending on the report type. Each parameter is described below.

CUSTOMIZE THIS REPORT

Report Title: Envelope Report

Description: All envelopes sent or received by me.

PARAMETERS

Date Type: Sent Date Completed Date

Date Range: Month To Date

Envelope Status: Sent

Subject Contains:

Recipient Contains:

Sent By: Any Specific Users Specific Groups

Dates – Available for the Envelope Report, Envelope Recipient Report, Envelope Status Report, Envelope Velocity Report, Recipient Activity Report and Recipient Authentication Report. This parameter sets if the report date interval is based on the envelope’s sent date or completed date. The default setting is sent date. The From data cannot be earlier than January 1, 2001 and the To data cannot be after the current date.

Sent/Completed/Activity Date – Available for all reports. This parameter sets the start and end date interval for the report. The **Any** setting uses a date interval of the account’s start date to the current date. The **Custom** setting allows the user to manually select the start and end dates used. The default setting is Month to Date.

Period Interval – Available for the Envelope Volume Report. This parameter sets the period start and end interval for the report. The default setting is Monthly.

Envelope Status – Available for the Envelope Report, Envelope Recipient Report, Recipient Activity Report and Recipient Authentication Report. This parameter sets the status of the envelopes shown in the report. The default setting is Any.

Subject Contains – Available for the Envelope Report, Envelope Recipient Report, Envelope Velocity Report, Recipient Activity Report and Recipient Authentication Report. This parameter sets the text and characters searched for in the envelope subject. The search is not case sensitive. All envelopes with the text and characters in the envelope subject are included in the report. The special characters '<', '>', and '&#' are not allowed in this field.

Note: Subject text searches do not support Unicode or multi-byte characters at this time. This is a known issue.

Example: If *West* is entered as a parameter, the report will include envelopes with *west*, *West*, *southwest* and *northwest* in the subject.

Recipient Contains – Available for the Envelope Report, Envelope Recipient Report, Envelope Velocity Report, Recipient Activity Report and Recipient Authentication Report. This parameter sets the text and characters searched for in the envelope recipients. The search is not case sensitive. All envelopes with the text and characters as an envelope recipient are included in the report. The special characters '<', '>', and '&#' are not allowed in this field.

Specific Users & Groups – These options are only available to account administrators and are available for the Envelope Report, Envelope Recipient Report, Envelope Velocity Report, Recipient Activity Report, Recipient Authentication Report, User Activity Report and Group Activity Report. This parameter sets the specific users or groups shown in the report. The default setting is Any.

Select the user or group from the Available block on the left and click **Add>>** to move the user or group to the Selected block. You can select multiple users/groups in a block by pressing the Shift key or Ctrl key while selecting users/groups.

The screenshot shows a user selection interface with three radio buttons at the top: 'Any', 'Specific Users' (which is selected), and 'Specific Groups'. Below these are two main panels. The left panel is titled 'Available' and contains a list of three users: Steve Anderson (steve.anderson_ds@yahoo.com), Steve Wright (swright@amica.com), and Tom Test (t.test_ds@yahoo.com). Above the list are 'Select All' and 'Filter by Name...' options. The right panel is titled 'Selected' and is currently empty, with 'Select All' and 'Filter by Name...' options. Between the two panels are two buttons: 'Add >>' and '<< Remove'.

Appearance Options: - These options are available to all users, but vary depending on the report being customized. The Appearance Options set the columns that are shown in the report. See the report description for information on the columns that are available for each report.

You can add a column from the Available Columns list by selecting it and clicking **Add>>** or by clicking and dragging the column to Selected Columns. You can remove a column from the Selected Columns list by selecting it and clicking **Remove>>** or by clicking and dragging the column to Available Columns. You can also select and move multiple columns.

You can change the order in which columns appear in the report by selecting the column and using the up or down arrow buttons to the right of Selected Columns or by clicking and dragging the column to the proper position.

Scheduling Reports

Scheduling allows users to set when a report is run and, optionally, set up a list of people that will receive a copy of the report by email. Reports are delivered to the email recipients as a zipped file attachment. The zipped file contains a CSV (Command-Separated Value) file with the report information, allowing easy importation and management of the report information. Scheduling can be used with standard and customized reports and a user can have up to 20 scheduled reports. Scheduled reports start running at midnight for the time zone set for the user that schedules the report.

1. To set a report schedule, click **Schedule** adjacent to the report name to go to the Schedule a Report page.

SCHEDULE A REPORT

Report: Envelope Report

SCHEDULE

Daily
 Weekly
 Monthly
 Once

Every days
 Every weekday (Monday - Friday)

Start Date:

End Date:

DELIVERY

Format: Comma-separated values (CSV)

Recipients: Send to me (*steve.anderson@docusign.com*) Send to others

Message (Optional):

2. On the Schedule a Report page, select the Schedule time frame (**Daily, Weekly, Monthly, or Once**) and additional parameters for your scheduled report.

Note: If you select **Once**, you can only set the date for the report and it cannot be the current date or a past date. If you want to see the report using the current data, run a standard or customized report and save it as a .CSV file so it can be sent to others.

3. Set the **Schedule Start Date** and **Schedule End Date** for the report. The start date always defaults to tomorrow, but can be set for any date in the future. The end date will default to 1 year from the start date for Monthly schedules or 6 months from the start date for Daily or Weekly schedules.

Note: The Schedule End Date cannot be set to more than 1 year from the Schedule Start Date. DocuSign will send a warning email to the report creator when a scheduled report's end date is within 30 days alerting them that they scheduled report will expire soon.

4. Set the Delivery information for the schedule report.

- Select if you want the CSV file of the report sent to your email address.
- Select if you want the CSV file of the report sent to others.

This opens a text box where the email addresses are entered. The **Send to Others** text box can have a maximum of 2000 characters. Multiple email addresses must be separated by a comma.

Note: DocuSign does not validate the email addresses when they are entered, so it is important to double-check the email addresses after you add them to the text box. Email addresses that do not match standard email patterns are removed after a report is scheduled.

- Optionally, you can add a message that is included in the email with the CSV file. The **Message** text box can have a maximum of 200 characters.

5. Click **Schedule** to schedule the report delivery.

You are returned to the Reports tab and a clock icon appears adjacent to the scheduled report.

Viewing and Editing Scheduled Report Information

Scheduled Reports have a clock icon adjacent to the Schedule link. If there is a problem with the running a scheduled report, the clock icon changes to a warning icon. You can view information about a scheduled report and the report history by clicking the **Schedule** link adjacent to the report name.

The right side of the Schedule a Report page shows the history of the scheduled report, including when the report ran, where the report was sent (a list of email addresses), and if there were errors when running the report. The history section shows information from the previous 10 scheduled reports or previous 2 years (whichever is less). You can download the .CSV file of a previous report by clicking on the report date link in the History section.

You can edit the report schedule by following the same steps as scheduling a report and clicking **Update** to save the changes.

Important: If you update a scheduled report, all the History information for the previous schedule is removed from the report and can no longer be accessed.

You can remove a scheduled report by clicking **Deactivate Schedule** at the bottom of the Schedule a Report page.

Viewing Report Information

When the report is complete, it is shown on the page.

<< Back to Reports

Download as CSV | Print | Edit

Report: Envelope Report

Dates: 1/1/2013 to 11/20/2013 (Year To Date) Total results: 12
As of: 11/20/2013 12:00:00 AM PT

Subject	Status	Sender	Recipient	Sent On ▼	Last Activity	Completed On	Completion Time (DD:HH:MM)
Please DocuSign this document:	Delivered	Steve Anderson	Kevin Smith	11/13/2013 3:52:26 PM PT	11/13/2013 3:53:01 PM PT		
Please DocuSign this document:	Delivered	Steve Anderson	Kevin Smith	11/13/2013 3:38:24 PM PT	11/13/2013 3:40:44 PM PT		
Express ID	Completed	Steve Anderson	Dave Schueler	11/13/2013 3:28:47 PM PT	11/13/2013 3:34:25 PM PT	11/13/2013 3:34:25 PM PT	00:00:06
Please DocuSign this document: NDA-2.pdf	Delivered	Steve Anderson	Steve Anderson	11/11/2013 3:18:48 PM PT	11/11/2013 3:19:26 PM PT		
Please DocuSign this document: NDA-2.pdf	Delivered	Steve Anderson	Kevin Smith	11/7/2013 2:04:25 PM PT	11/7/2013 2:06:21 PM PT		
Please DocuSign this non-disclosure agreement	Completed	Steve Anderson	Kevin Smith	9/26/2013 10:50:59 AM PT	9/26/2013 11:01:39 AM PT	9/26/2013 11:01:39 AM PT	00:00:11
Please DocuSign this document: NDA-2.pdf	Sent	Steve Anderson	Multiple	8/16/2013 8:51:16 AM PT	8/16/2013 8:51:16 AM PT		
Please DocuSign Notary this document	Completed	Steve Anderson	Multiple	8/12/2013 8:08:01 AM PT	8/15/2013 3:00:34 PM PT	8/15/2013 3:00:34 PM PT	03:06:53
Sign Documents with a Notary	Voided	Steve Anderson	Multiple	8/11/2013 5:28:54 PM PT	8/12/2013 8:05:28 AM PT		
Digital Certificate Test	Delivered	Steve Anderson	Kevin Smith	8/7/2013 2:08:41 PM PT	8/7/2013 2:09:31 PM PT		
Notarized Documents	Completed	Steve Anderson	Multiple	8/7/2013 10:39:02 AM PT	8/7/2013 11:05:21 AM PT	8/7/2013 11:05:21 AM PT	00:00:27
Notarized Documents	Completed	Steve Anderson	Multiple	8/6/2013 5:22:37 PM PT	8/6/2013 5:43:00 PM PT	8/6/2013 5:43:00 PM PT	00:00:21

Page 1 of 1

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The report date and non-default parameters are shown above the report on the left side of the page. All the parameter settings for the current report can be seen in a pop-up box by placing cursor over the parameters.

Envelope Status: Any

Subject Contains: All Subjects

Recipient Contains: All Recipients

Dates: 08/01/2013 to 08/21/2013

Users: All

The 'As of' date and time, shown at the top right of the report, shows the end date for data in the report.

As of: 8/22/2013 12:00:00 AM PT

Users can click:

- A report column heading to change the sort order for the report. The Custom Fields column cannot be used to sort the report.
- << **Back to My Reports** to return to the list of Standard Reports

- **Download as CSV** to save the report information to a comma separated value (CSV) file
- **Print** to send the report information to a printer
- **Edit** to go to the Customize page for the report

Supported Languages

DocuSign supports the following languages in sending:

Chinese Simplified	Dutch	English (US)	French
German	Italian	Japanese	Korean
Portuguese	Portuguese (Brazil)	Russian	Spanish

DocuSign supports the following languages in signing, viewing and emails:

Arabic	Bulgarian	Bahasa Indonesia	Bahasa Melayu
Chinese Simplified	Chinese Traditional	Croatian	Czech
Danish	Dutch	English (UK)	English (US)
Estonian	Farsi	Finnish	French
French (Canada)	German	Greek	Hebrew
Hindi	Hungarian	Italian	Japanese
Korean	Latvian	Lithuanian	Norwegian
Polish	Portuguese (Brazil)	Portuguese (Portugal)	Romanian
Russian (Russian)	Serbian-Latin	Slovakian	Slovenian
Spanish (Latin America)	Spanish (Spain - Modern Sort)	Swedish	Thai
Turkish	Ukrainian	Vietnamese	

Logging Off

When are done working with DocuSign, we recommend that you log off the web application.

Note: The web application is configured to automatically log off inactive users. The automatic log off time is set by your account administrator, with the default value set to 20 minutes.

To log off, click **Logout**. This returns you to the DocuSign Login screen.

Sending Documents for Electronic Signing with DocuSign

A key feature of DocuSign is the ability to easily create and send documents for signing. This section of the user guide provides step-by-step procedures for sending documents for signing. The general steps in this process are:

- Start a new envelope
- 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.

Each of these steps is described in the following sections.

DocuSign also offers advanced sending options, such as allowing recipients to sign on paper, provide documents as file attachments or by fax and conditional fields. The advanced features available to you vary based on your DocuSign plan. See the [Advanced Sending Options](#) section of this guide for more information about these options.

For more information about how recipients see and sign documents, see the [Signing Documents with DocuSign](#) section.

Guided Signing and Free-Form Signing

DocuSign has 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 section.

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 for Free-Form Signing](#) section in this guide.

Starting a New Envelope

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: If the Advanced Sending option is selected for your web application, you will use the one-page sending view. See [Advanced Sending Option](#) for more information about using this option.

The screenshot shows the DocuSign 'Send' interface. At the top, there are navigation tabs: Home, Manage, Send (active), and Dashboards. The user is logged in as GenWatt, Inc. 36874. The main content area is divided into three sections:

- Documents for Signature:** Contains two buttons: 'Browse from my Computer' and 'Choose an Online Document'. Below them is a separator '- or -'. To the right, there is instructional text: 'Select and upload documents from your computer, your template library, or the Internet' and a bulleted list:
 - Create or alter the document order by dragging a document or entering a new order number
 - Apply a reusable template from your library to save time
- Recipients and Routing:** Contains input fields for 'Recipient Email' (with an 'Add Me' link) and 'Recipient Name'. Below these are buttons for 'Add Signer' and 'Add CC', followed by a separator '- or -' and a button for 'Add Bulk Recipient'. To the right, there is instructional text: 'Enter the name and email address for your recipients' and a bulleted list:
 - Create or alter the routing order (who signs first, second, etc.) by dragging a recipient or entering a new order number
 - Select the recipient type to create the desired signer experience
 - Secure your envelope by verifying the signer's identity before signing
 Below this is a link for 'Order Diagram'.
- Email Message:** Contains a 'Subject to All Recipients' input field with '(required)' below it.

At the bottom of the form, there are buttons for 'Next', 'Send Now', 'Save Draft', and 'Discard Changes'. A checkbox for 'Use Advanced Sending' is also present. The footer includes the DocuSign logo, 'English (US)', and links for 'Terms Of Use', 'Support', and 'Feedback'. Copyright © 2012 DocuSign, Inc. All rights reserved.

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:

This is a close-up of the 'Documents for Signature' section from the screenshot above. It shows the two buttons: 'Browse from my Computer' and 'Choose an Online Document', separated by a '- or -' separator.

Note: If you are uploading a PDF file with Form Fields, DocuSign Automatically detects the fields and will ask if you would like the fields to be converted to DocuSign tags.

- 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.

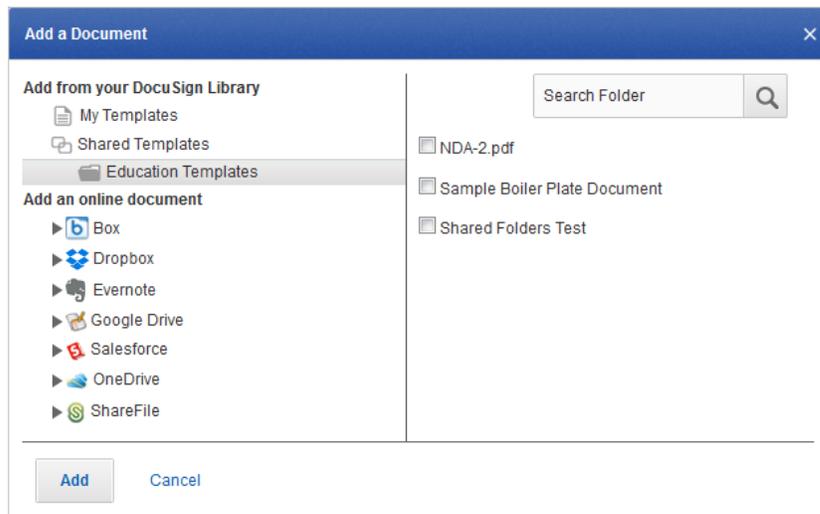
DocuSign converts documents to PDF file format, but you can upload documents in any of the following file formats:

- Microsoft® Word® 2003, 2007, 2010, 2013
- Microsoft Excel® 2003, 2007, 2010, 2013
- Microsoft PowerPoint® 2003, 2007, 2010, 2013
- Text files (.txt)
- Rich Text Format (.rtf)
- Image file formats (.png, .jpg, .gif and .tif)
- Portable Document Format (.pdf) files

Note: DocuSign does not support macro-enabled files. Please remove the macros or convert the file to PDF prior to adding it to an envelope.

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 or Google Drive, you might need to log on to the external document source. You might need to disable your pop-up blocker to log on to an external document source.

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

Note: If you are using multiple documents or templates, you should be aware of the Data Population Scope setting for your account. If the account setting is **Envelope**, DocuSign tags with the same Label will populate with the same data when a recipient enters or modifies information in the tag for all documents in the envelope. If the account setting is **Document**, only DocuSign tags with the same Label and in the same document will populate with the same data when a recipient enters or modifies information in the tag.

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.

The screenshot shows the 'Recipients and Routing' interface. At the top, there's a header 'Recipients and Routing'. Below it, there are two input fields: 'Recipient Email' with an 'Add Me' link to its right, and 'Recipient Name'. Below these fields are two buttons: 'Add Signer' and 'Add CC'. Underneath these buttons is the text '- or -' and a button labeled 'Add Bulk Recipient'.

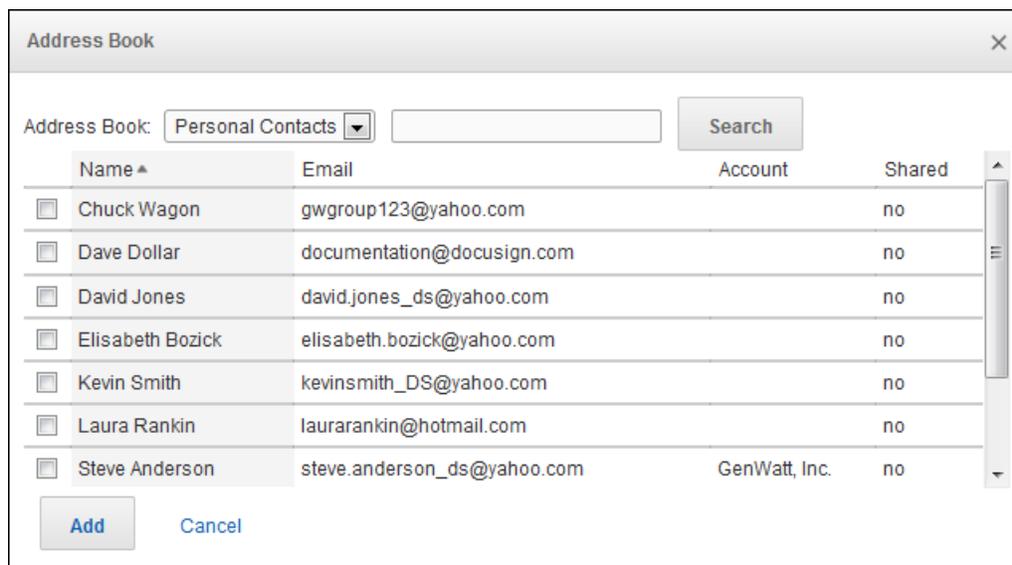
Sending to recipients with the same Email address: You can send an envelope to people that share an email address by adding the first person normally. Then add the second person by

typing the same email address in the Email field, typing the second person's name in the Name field and then clicking **Add Signer**. The system adds the second recipient to the list.

Sending with the Fax Out for Signature Feature: If your account is enabled to deliver an envelope by fax, you are not required to type an Email address and you can select a Fax delivery method. See [Using the Fax Out for Signature Feature](#) for more information.

Sending a Bulk Recipient file: If your account is enabled to send bulk recipient files, you can upload a file with multiple recipients. See [Using the Bulk Recipient Feature](#) for more information.

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.



Adding recipients for a template: If you are sending an envelope from a template, there are placeholders for the recipients already added to the envelope. Replace the placeholder recipient Email and Name information with the Email and Name of your recipient.

Sending to Yourself: You can add yourself as a recipient by clicking the **Add Me** link. Your information is added to the recipient list with a Sign Action. Adjust your Action and other settings as needed.

2. **Recipient Actions:** After adding a recipient, you can select the Action for the recipient. This sets the actions a recipient can perform. When you add a recipient by clicking **Add Signer**, the recipient Action is set to Sign. When you add a recipient by clicking **Add CC**, the recipient action is set to Receive a copy. An envelope must have at least one Signer or Acknowledge receipt recipient.

Note: you can only assign tags to recipients with a **Sign** or **Sign in person** recipient action.

The different recipient actions are described below:

- **Sign:** Use this action if your recipient must sign, initial, date or add data to form fields on the documents in the envelope.
- **Sign in person:** Use this action if the signer is in the same physical location as a DocuSign user who will act as a **Signing Host** for the transaction. The recipient added is the Signing

Host and new separate *Signer Name* field appears after **Sign in person** is selected. Type the name of the signer in the Signer Name field. See [Sending for In Person Signing](#) for more information on sending an envelope for in person signing.

- **Acknowledge receipt:** Use this action if the recipient must receive the completed documents for the envelope to be completed, but the recipient does not need to sign, initial, date or add information to any of the documents.
- **Receive a copy:** Use this action if the recipient should get a copy of the envelope, but the recipient does not need to sign, initial, date or add information to any of the documents. This type of recipient can be placed in any order in the recipient list. The recipient receives a copy of the envelope when the envelope reaches the recipient's order in the process flow and when the envelope is completed.
- **Address recipients:** This recipient can add name and email information for recipients that appear after the recipient in workflow order. This recipient type is only available if the Send to Manage feature is enabled for the sender and document visibility is not enabled. See [Agent Managed Envelopes](#) for more information on using this recipient action.
- **Manage envelope:** This recipient has the same management and access rights for the envelope as the sender and can make changes to the envelope as if they were using the Advanced Correct feature. This recipient can add name and email information, add or change the routing order and set authentication options for the remaining recipients. Additionally, this recipient can edit signature/initial tags and data fields for the remaining recipients. This recipient must have a DocuSign account and is only available if the Send to Manage feature is enabled for the sender. See [Agent Managed Envelopes](#) for more information on using this recipient action.
- **Manage recipients:** This recipient can, but is not required to, add name and email information for recipients at the same or subsequent level in the workflow order. This recipient type is only available if the Send to Manage feature is enabled for the sender and document visibility is not enabled. See [Using the Intermediary Recipient Feature](#) for more information on using this recipient action.

3. Identifying Recipients: Optionally, you can select how to Identify a recipient.

Click on the **Identify** list to select the authentication options you want to use for the recipient.



By default, Email identification is selected. Other authentication options (Access Code, SMS Authentication, Phone Authentication, ID Check, Live ID and Social ID) can be selected for the recipient. The authentication options available depend on your account plan and settings. Each authentication option is described below:

Note: You can add Access Code authentication and one other authentication type for a single recipient.

- **Access Code:** The Access Code option requires your recipient to enter an access code before they can view the envelope.

The screenshot shows the 'Identify' dialog box. At the top, there is a dropdown menu labeled 'Email'. Below it, there is a checked checkbox labeled 'Email'. Underneath, there is a checked checkbox next to an empty text input field. At the bottom, there is an unchecked checkbox next to a dropdown menu labeled '-- Identity Check --'.

To enable access code security option, select the **Access Code** check box and type the access code into the field. The access code can include upper case or lower case letters, numbers, and special characters. You must provide this access code to your recipient. It is recommended that you provide the code over the phone or using some other secure method. There is no additional fee for using this authentication check. The maximum length of an Access Code is 50 characters.

Note: There might be requirements for the access code if your account has enabled the Access Code Format option. Check with your administrator to determine if there are any access code requirements for your account.

- **SMS Authentication:** The SMS Authentication option asks the recipient to select a mobile phone number that a one-time passcode text message can be sent to for authentication. DocuSign sends the passcode to the phone number and the recipient must enter the passcode to open the envelope.

The screenshot shows the 'Identify' dialog box. At the top, there is a dropdown menu labeled 'Email, ID'. Below it, there is a checked checkbox labeled 'Email'. Underneath, there is an unchecked checkbox next to a text input field labeled 'Access Code'. Below that, there is a checked checkbox next to a dropdown menu labeled 'SMS Auth'. Underneath, there is a section titled 'SMS Authentication' with a horizontal line. Below the line, there are three unchecked checkboxes with labels: 'Home 111-222-3333', 'Home 222-333-4444', and 'Work 333-444-5555'. At the bottom, there is an unchecked checkbox next to a dropdown menu labeled 'US/Canada' and a button labeled 'New Number'.

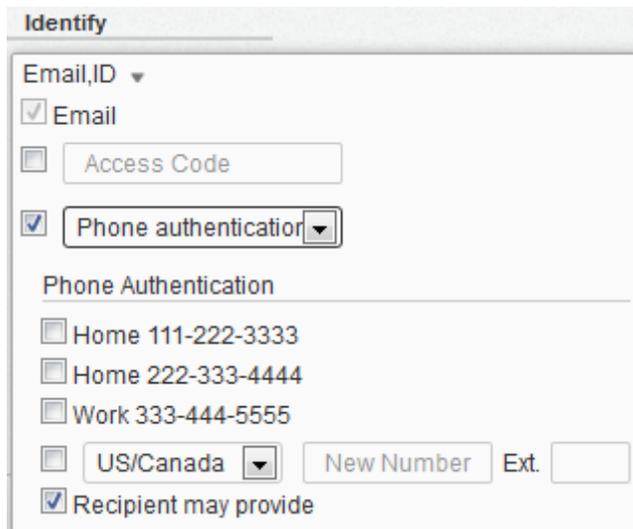
To enable SMS Authentication, select the **Identity Check** checkbox and then select **SMS Auth** from the list. The SMS Authentication information for the recipient appears.

Note: The number used for SMS Authentication must be able to accept an SMS text message.

- Select phone numbers that the recipient can choose from for use during the authentication phone call. The phone numbers listed here are associated with the Address Book entry for the recipient. If the recipient does not have any phone numbers in the Address Book or is not in your Address Book, no numbers are shown.

- You can also select to add a phone number for the recipient. Select the Country for the phone number, type the phone number and, if the number has an extension, type the extension number.
- **Phone Authentication:** The Phone Authentication option asks the recipient to select or type a phone number to use for authentication and then they are presented with a validation code while the system places a call to the number. After answering the phone, the recipient is prompted to enter the validation code and speak their name. There is an additional fee for using this authentication check.

Note: Do not use the Phone Authentication if your recipient cannot connect to the Internet and use their telephone at the same time.



The screenshot shows a web form titled "Identify". At the top, there is a dropdown menu labeled "Email, ID" with a downward arrow. Below this are three checked checkboxes: "Email", "Access Code" (with an adjacent text input field), and "Phone authentication" (with a dropdown arrow). Under the "Phone authentication" section, there are three unchecked checkboxes for phone numbers: "Home 111-222-3333", "Home 222-333-4444", and "Work 333-444-5555". Below these is a "New Number" section with a checked checkbox, a dropdown menu set to "US/Canada", a "New Number" text input field, and an "Ext." text input field. At the bottom of the form, there is a checked checkbox labeled "Recipient may provide".

To enable Phone Authentication, select the - **Identity Check** - check box and then select **Phone authentication** from the list. The Phone Authentication information for the recipient appears.

Important: If phone authentication is selected and the system does not have a number to dial for the recipient (either by allowing the recipient to enter a number, or from the Address Book or by the entering a number), you cannot complete the sending process.

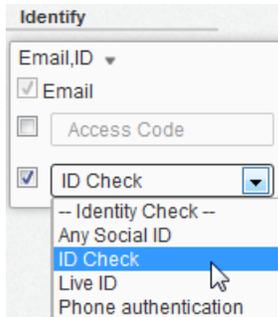
- Select phone numbers that the recipient can choose from for use during the authentication phone call. The phone numbers listed here are associated with the Address Book entry for the recipient. If the recipient does not have any phone numbers in the Address Book or is not in your Address Book, no numbers are shown.
- You can also select **New Number** to add a phone number for the recipient. Select the Country for the phone number, type the phone number and, if the number has an extension, type the extension number.
- Additionally, you can select **Recipient may provide** to allow the recipient to type their own phone number.
- **ID Check:** The ID Check option asks the recipient to provide some initial personal information (current address is required, but there is other optional information the recipient can enter) and then answer a set of questions before the recipient can view the envelope. The questions are based on data available in public records (such as where they have lived).

The ID Check is a knowledge-based authentication provided by RSA. This service is often used by many banks to validate the ID of recipients.

The ID Check option might not be useful for recipients outside the United States. There is an additional fee for using this authentication check.

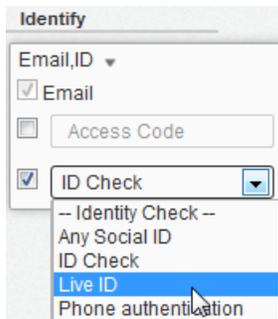
Note: If you select ID Check for a recipient, then the recipient name you supply is the one used for the ID check.

To enable the ID Check option, select the - **Identity Check** - check box and then select **ID Check** from the list.



- **Live ID or Social ID Identity Check:** This option requires your recipient to enter their Live ID or Social ID (Salesforce, LinkedIn, Google, etc.) credentials before they can view the envelope.

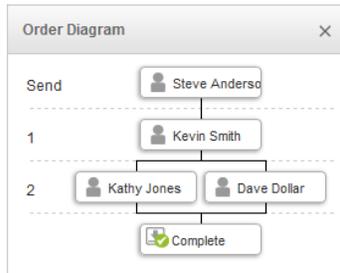
To enable the Live ID or Social ID security option, select the - **Identity Check** - check box and then select **Live ID** or **Social ID** from the list.



4. Repeat steps 1 through 3 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.

- You can see a graphical representation of the routing order for your recipients by clicking the **Order Diagram** link.



- 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: DocuSign automatically adds a subject based on the documents you have added.

Email Message

Subject to **All Recipients**

Please DocuSign this document: NDA-2.pdf

Email Message to **All Recipients**

[Customize email and signing language for each recipient](#)

Add a Note to

- Type an **Email Subject** for the envelope. The subject is limited to 100 characters.
- Optionally, type an Email Message for all recipients. The message is limited to 2000 characters.
- 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.
- Optionally, you can select the email language used for a recipient. This option sets the language used in the standard email format and initial signing view for the recipient, but it does not translate the Email Subject, Email Message text or note text. You must type the subject, message or note in the correct language.

Note: This option might not be enabled for your account. If you have questions about the options available for your account, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

- Click **Customize email and signing language for each recipient** the Customize Email Language dialog box appears.
- Select the language for each recipient and click **Done**. You are returned to the Prepare Envelope page and separate Email Subject, Email Message and Note fields are provided for each recipient.
- For each recipient, type an **Email Subject** for the envelope. Optionally, type an Email Message and Note for the recipient.

5. 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.

Adding Envelope Settings

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

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

The following section describes the different options in the Envelope Settings section.

Branding Setting

If your account has Branding enabled and you have access to multiple brand profiles, you can select the account brand that is seen by your recipient during viewing and signing.

Note: If you are sending from a template and the person that created the template locked the template brand when creating the template, the brand profile cannot be changed.

Recipient Information Settings

The following options might be available for your account:

- **Allow recipient(s) to sign on paper:** Select this option to allow signers to print and sign the document on paper instead of electronically. See [Allowing Your Recipients to Sign On Paper](#) for more information about this.
- **Allow recipient(s) to edit the document(s):** Select this option to enable the Document Markup feature, which allows recipients to access the markup tool. The markup tool is used to cover up old text, cover text and add new text, or to add new text. Recipients that signed a document before the markup tool changes are made are given a new opportunity to review and approve the changes before any document is finalized. See [Using the Document Markup Feature](#) for more information about Document Markup.
- **Allow recipient(s) to change signing responsibility:** Select this option to allow the recipient to reassign the envelope to another person.
- **Turn on auto navigation:** Select this option to turn on auto navigation for the envelope. If this is not selected, there is no auto navigation in the envelope.
- **Must be a signer to view signed documents:** When this option is selected, recipients will only be able to see documents that have Signature or Initial tags assigned to them or that do not have any Signature or Initial tags. See [Using Document Visibility](#) for more information on this setting.

Reminders and Expirations Settings

Optionally, you define rules to remind your recipients of their signing tasks and to expire your envelope if it is not signed.

Sender Settings

This section lets you select to stamp the envelope ID on the documents in the envelope and has the active Envelope Custom Fields for your account.

When you are done changing any Envelope Settings, click **Next** to begin tagging the documents.

Adding Tags to Documents

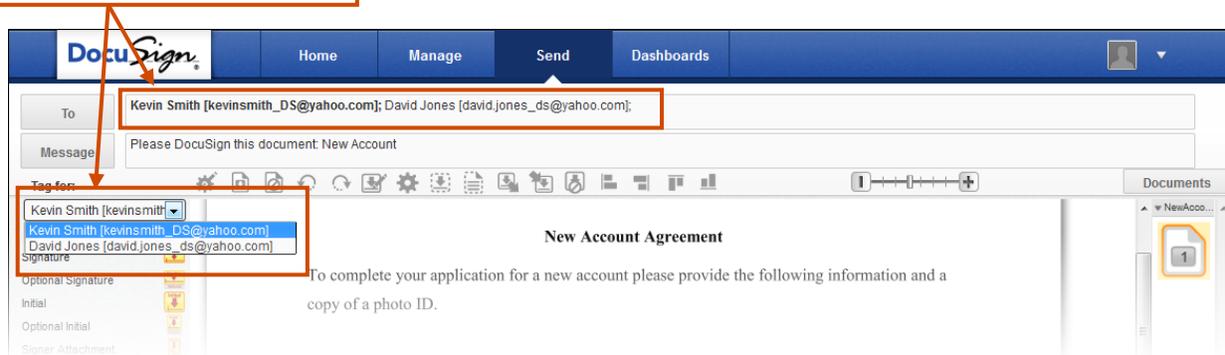
Note: You can only add/assign tags to recipients with a **Sign** or **Sign in person** recipient action. If there are no recipients with a **Sign** or **Sign in person** recipient action, you cannot add any tags.

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.

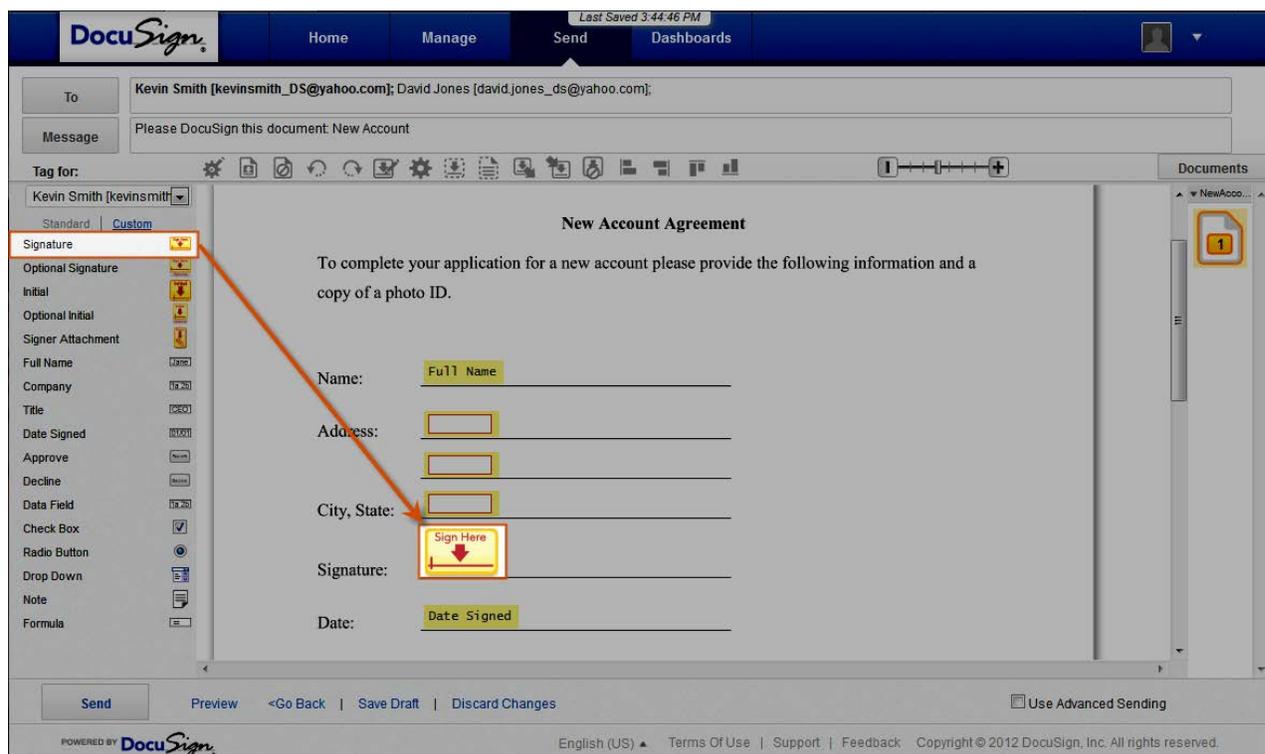
Note: Optionally, you can send the document for free-form signing instead of adding tags to the document. If you are sending the document with free-form signing, click the **Send** button. See [Sending for Free-Form Signing](#) for more information.

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. See the [DocuSign Tag Information](#) section for more information about tags and tag properties.



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 web application.

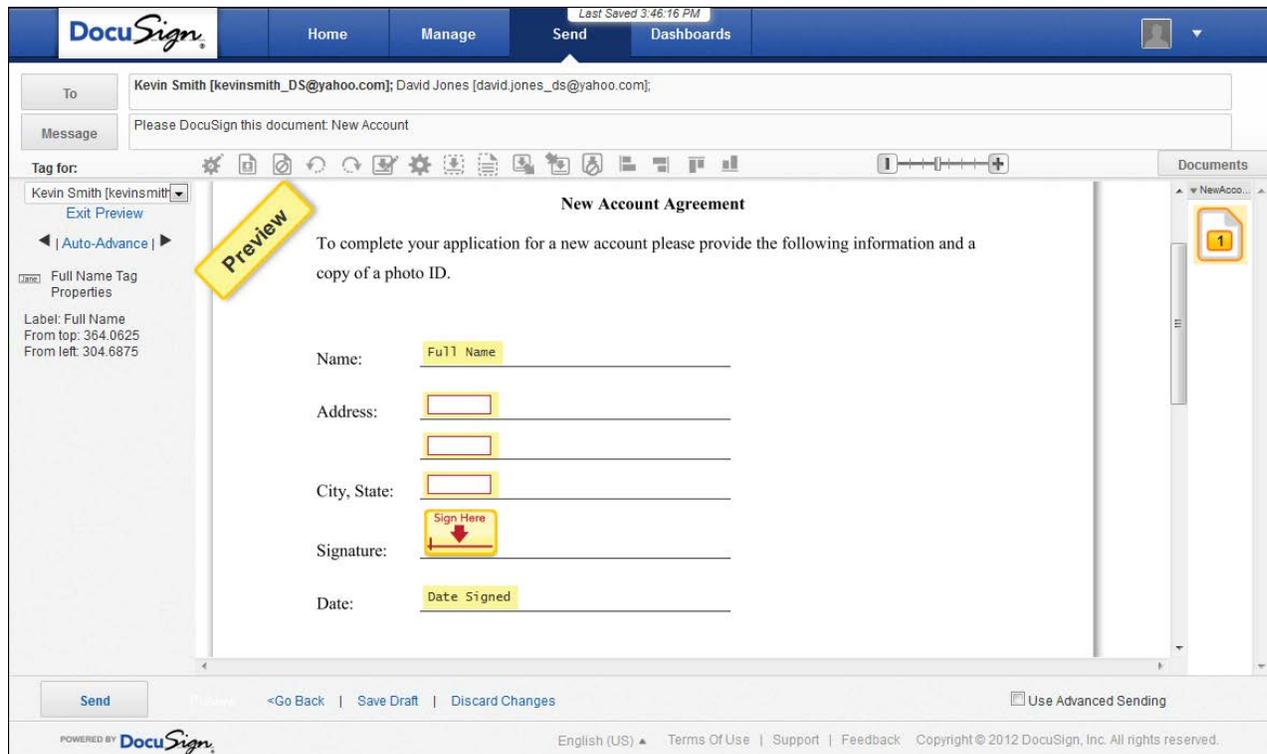
You can also use the Tagging Toolbar to edit your envelope settings, documents and tags. The Tagging Toolbar is on the upper-portion of the Add Tags page, below the message field. See [Working with the Tagging Toolbar](#) for more information about the toolbar.

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. Before sending an envelope, you have the option to 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 Manage tab.

DocuSign Tag Information

DocuSign tags are used to indicate locations on a document where the recipient needs to take an action and to provide information for the recipient. Some tags are automatically filled with recipient information. This section describes all the different DocuSign tag types, when the tags are used and the properties associated with each tag type.

Note: Your account might not support all of the tag types and tag properties. Tag properties that are not standard have an asterisk (*) after the name. If you have questions about supported tag types, check your DocuSign account.

When you add tags you can set options for the tag. Click on the **Properties** icon  adjacent to the tag to open the Properties dialog box for the tag. The Properties dialog box is divided into several sections, which depend on the type of tag.

The different DocuSign tags are listed below. Click on the tag name below to jump to the tag description and the properties associated with the tag.

Signature	Optional Signature	Initial	Optional Initial
Signer Attachment	Full Name	First Name	Last Name
Email Address	Company	Title	Date Signed
Approve	Decline	Data Field	Check Box
Radio Button	Drop Down	Note	Formula

Signature Tag: Place this tag where the recipient must sign the document. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Scale:** Sets the size of the tag. The size can also be set by clicking and dragging the slider bar on the left side of the tag.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.



Optional Signature Tag: Place this tag where the recipient can sign, if they wish, it is not a required tag. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Scale:** Sets the size of the tag. The size can also be set by clicking and dragging the slider bar on the left side of the tag.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.



Initial Tag: Place this tag where the recipient must initial the document. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Scale:** Sets the size of the tag. The size can also be set by clicking and dragging the slider bar on the left side of the tag.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.



Optional Initial Tag: Place where the recipient can initial, if they wish, but it is not required. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Scale:** Sets the size of the tag. The size can also be set by clicking and dragging the slider bar on the left side of the tag.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.



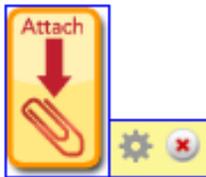
Signer Attachment Tag: The signer attachment is where the recipient initiates the process of adding supporting documents to an envelope. See [Requesting Documents from Your Recipients](#) for more information about signer attachments. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.



Formatting Properties

- **Require Signer Review After Upload:** If the recipient sends the documents by fax, selecting this option requires the recipient to verify the faxed documents are correct before the envelope is complete. After the fax is received by DocuSign, the recipient receives a new email asking them to verify the documents. The default is not required.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

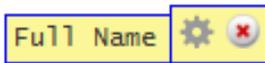
Full Name Tag: Place this tag on the document where you want the recipient's name to appear. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.



Formatting Properties

- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

First Name Tag: Place this tag on the document where you want the recipient's first name to appear. This tag takes the recipient's name, as entered in the recipient information, splits it into parts based on spaces and uses the first part as the first name. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.

Location

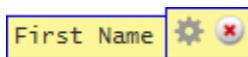
- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

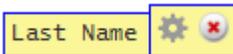


Last Name Tag: Place this tag on the document where you want the recipient's last name to appear. This tag takes the recipient's name, as entered in the recipient information, splits it into parts based on spaces and uses the last part as the last name. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.

Location



- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

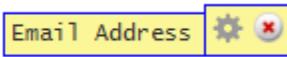
Email Address Tag: Place this tag on the document where you want the recipient's email address, as entered when adding the recipient to the envelope, to appear. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.



Formatting Properties

- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

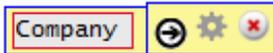
Company Tag: Place this tag on the document where you want the recipient's company name to appear. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.
- **Tool Tip:** The text a recipient sees when they position their cursor over the tag when signing a document. You can specify a tool tip for the tag to provide help for your recipient.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.



Formatting Properties

- **Characters per line and Lines:** This sets the maximum number of characters for the tag. You can also adjust the length of the tag by clicking and dragging the arrow icon to the right of the tag.
- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.
- **Required:** You can choose to make the tag required or optional for the recipient. The default is required.
- **Locked:** If you provide information for a tag, you can choose to lock the tag, so that the information cannot be changed, or make it editable by the recipient. The default is editable (not-locked).

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

Title Tag: Place this tag on the document where you want the recipient's title to appear. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.
- **Tool Tip:** The text a recipient sees when they position their cursor over the tag when signing a document. You can specify a tool tip for the tag to provide help for your recipient.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.



Formatting Properties

- **Characters per line and Lines:** This sets the maximum number of characters for the tag. You can also adjust the length of the tag by clicking and dragging the arrow icon to the right of the tag.
- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.
- **Required:** You can choose to make the tag required or optional for the recipient. The default is required.
- **Locked:** If you provide information for a tag, you can choose to lock the tag, so that the information cannot be changed, or make it editable by the recipient. The default is editable (not-locked).

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

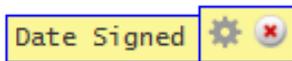
Date Signed Tag: Place this tag on the document where you want the date the recipient signed the document to appear. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.



Formatting Properties

- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

Approve Tag: Place this tag on the document where you want the recipient to approve documents in an envelope without placing a signature or initials on the document. If the recipient clicks the Approve tag during the signing process, the recipient is considered to have signed the document. No information is shown on the document for the approval, but it is recorded as a signature in the envelope history. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.
- **Tool Tip:** The text a recipient sees when they position their cursor over the tag when signing a document. You can specify a tool tip for the tag to provide help for your recipient.



Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

Decline Tag: Place this tag on the document where you want to give the recipient the option of declining an envelope. If the recipient clicks the Decline tag during the signing process, the envelope is voided. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.
- **Tool Tip:** The text a recipient sees when they position their cursor over the tag when signing a document. You can specify a tool tip for the tag to provide help for your recipient.



Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

Data Field Tag: This tag is an adaptable field that allows the recipient to enter different information. After placing a data field, you can edit the properties of the data field. The following properties can be edited for this tag:

Tip: You can set up a Data Field tag to act as a link in the document by using the following settings:

Label = Type #HREF in the Label. If you will have more than one link in an envelope, add more information after the #HREF, so each Label is different (example: #HREF Link 1).

Tool Tip = Type the url for the link in the Tool Tip.

Data: Initial Value = Type the text to display for the link.

Formatting Properties: Locked = This must be selected (locked).



Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Allow All to Edit*:** Select this option to enable Field Markup for this tag. When selected, Require Initial becomes active and can be selected to require signers that have already completed signing to review and initial the changes to complete the envelope. If this option is selected, the *Hide value as asterisks **** option cannot be used. See [Using the Field Markup Feature](#) for more information about Field Markup.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope. Data field tags that share the same label and mask will share the same data when provided by the signer (i.e. information entered into one tag is automatically copied into other tags with the same label).
- **Tool Tip:** The text a recipient sees when they position their cursor over the tag when signing a document. You can specify a tool tip for the tag to provide help for your recipient.

Data

Data Field Tag (continued)

- **Initial Value:** This sets the initial information in the data field tag.
- **Mask:** This sets the type of data entered in the field. The default mask is text. The mask types are:

Text: Text fields accept any characters. The length and height of the field is adjustable.

Email: Email fields are single-line fields that accept any characters. The length of the field is adjustable.

Date: Date fields are single-line fields. A date can be entered in any format and the date will be reformatted to MM/DD/YYYY.

Number: Number fields are single-line fields that only accept numbers. The length of the field is adjustable.

SSN: SSN fields are single-line fields that accept numbers. A SSN can be typed with or without dashes. The length of the field is adjustable.

ZIP5: ZIP5 fields are single-line fields that accept numbers. The length of the field is adjustable.

ZIP5-4: ZIP5-4 fields are similar to ZIP5 fields. The zip code can be typed with or without dashes. The length of the field is adjustable.

Data Field Tag (continued)

- Hide value as asterisks *** – You can choose to conceal (hide) the information a recipient types into the field. The information appears normally while the recipient is adding or modifying the information, but the data is not visible to any other signer or the sender when signing or viewing the PDF. See [Adding a Concealed Fields](#) for information on adding the field. Senders or envelope owners can download and view the information through the web application, see [Collecting Envelope Form Data](#) for information on how to view and download the concealed field data. If this option is selected, the *Allow All to Edit* option cannot be used.
- This is a Payment Amount*: This option designates this tag as a payment tag. See [Using the Payment Processing Feature](#) for more information.
- Regex Pattern: This option is only available if the Mask type is Text. A Regular Expression (Regex) pattern is used to set the pattern or literal string that a signer must enter when completing the Data Field tag. If the signer does not enter the correct information, the entry in the Validation Error field is shown to the signer.

DocuSign uses the .NET implementation of regular expressions. For more information using and building regular expressions, refer to the [MSDN .NET Framework Regular Expressions](#) documentation.

DocuSign recommends testing your regex pattern against a .NET parser before saving the tag properties. There are a number of free online tools, such as: <http://regexstorm.net/tester>, available for testing .NET regex patterns.

Example: The Regex pattern `^(?=[^\d_].*?\d)\w(\w|[@#$%]){7,20}` restricts text entered to 8 to 20 alphanumeric characters and select special characters. Also, the text cannot start with a digit, underscore, or special character, and must have at least one digit.

- Validation Error: This option is only available if the Mask type is Text. This is the message that appears when the information entered by the signer does not match the Regex Pattern.

Location

- From left and From top: These fields show the position of the tag on the document and can be used to manually set the position.
- Anchor: Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on

using the anchor feature.

Formatting Properties

- **Characters per line and Lines:** This sets the maximum number of characters for the tag. You can also adjust the length of the tag by clicking and dragging the arrow icon to the right of the tag.
- **Fixed Width:** Select this option to prevent the Data Field tag from getting any larger on a document, even if the font type or size changes. This option can prevent a tag from covering up text on a document if the font type or size is changed.
- **Maximum number of characters:** This sets the maximum number of characters a signer can enter in the tag.
- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.
- **Required:** You can choose to make the tag required or optional for the recipient. The default is required.
- **Locked:** If you provide information for a tag, you can choose to lock the tag, so that the information cannot be changed, or make it editable by the recipient. The default is editable (not-locked).

Data Field Tag (continued)

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
 - **Parent Value:** Sets the value used to activate this field.
-

Check Box Tag: Place this tag on the document in a location where the recipient can select an option. See [Using Check Boxes and Radio Buttons](#) for more information about when and how to use radio buttons. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Allow All to Edit*:** Select this option to enable Field Markup for this tag. When selected, Require Initial becomes active and can be selected to require signers that have already completed signing to review and initial the changes to complete the envelope. See [Using the Field Markup Feature](#) for more information about Field Markup.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope. Check Box tags that share the same label will share the same data when provided by the signer (i.e. a check box that is checked will be automatically copied to other check boxes with the same label).
- **Tool Tip:** The text a recipient sees when they position their cursor over the tag when signing a document. You can specify a tool tip for the tag to provide help for your recipient.



Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Locked:** You can choose to lock the tag, so that the information cannot be changed, or make it editable by the recipient. The default is editable (not-locked).

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

Radio Button Tag: Place this tag on the document in a location where the recipient can select an option. See [Using Check Boxes and Radio Buttons](#) for more information about when and how to use radio buttons. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Allow All to Edit*:** Select this option to enable Field Markup for this tag. When selected, Require Initial becomes active and can be selected to require signers that have already completed signing to review and initial the changes to complete the envelope. See [Using the Field Markup Feature](#) for more information about Field Markup.
- **Group:** The name of the radio button group associated with this radio button. The group name connects multiple radio buttons in the same group. A recipient can only select one radio button in a group.
- **Value:** This is the value that appears in the form data for the document if the radio button is selected.



Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Required:** You can choose to make one button in the Radio Button group required or optional for the recipient. The default is required.
- **Locked:** You can choose to lock the tag, so that the information cannot be changed, or make it editable by the recipient. The default is editable (not-locked).

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

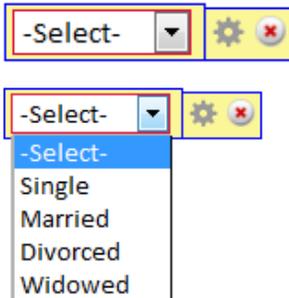
- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

Drop Down Tag: Use this tag to give your recipient a list of options they can select. The following properties can be edited for this field:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Allow All to Edit*:** Select this option to enable Field Markup for this tag. When selected, Require Initial becomes active and can be selected to require signers that have already completed signing to review and initial the changes to complete the envelope. See [Using the Field Markup Feature](#) for more information about Field Markup.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope). Drop Down tags that share the same label are set to the same value when the recipient selects the value for one linked drop down.

Data



- **Drop Down items:** These are the items shown in the drop down list. The items must be separated by semi-colons (;). This field is limited to 2000 characters, including the semi-colon separators.

For example: if you want a recipient to select from a list of marital status, you would type “Single;Married;Divorced;Widowed” in the field.

- **Drop down values:** These are optional values that relate to the drop down items, but can be different from the list of drop down items.

For example: You want the values for the previous list to have a value of 1 to 4, you would type “1;2;3;4” in the field and when Single is selected in the list, the value for the field would be 1.

- **Selected Value:** You can specify a default value for the drop down list. If you do not specify a default value, the word ‘select’ appears as the value in the list.
- **This is a Payment Amount*:** This option designates this tag as a payment tag. See [Using the Payment Processing Feature](#) for more information.

Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on

using the anchor feature.

Formatting Properties

- **Text Style:** These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.
- **Required:** You can choose to make the tag required or optional for the recipient. The default is required.
- **Locked:** If you provide information for a tag, you can choose to lock the tag, so that the information cannot be changed, or make it editable by the recipient. The default is editable (not-locked).

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- **Parent Tab:** Selects the Parent Tab for the Conditional Field
- **Parent Value:** Sets the value used to activate this field.

Note Tag: Place this tag on the document where you want additional information on a document for a recipient. The following properties can be edited for this tag:

Basic Properties

- **Recipient:** This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- **Allow All to View:** Select this option to allow all recipients to view the note.
- **Include in email:** Select this option to include the note in the email and on the document.
- **Label:** A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.
- **Tool Tip:** The text a recipient sees when they position their cursor over the tag when signing a document. You can specify a tool tip for the tag to provide help for your recipient.
- **Note:** The text of the note for the recipient. You might need to resize the note tag after typing the text.



Location

- **From left and From top:** These fields show the position of the tag on the document and can be used to manually set the position.
- **Anchor:** Anchors the tag to the specified word(s) in the envelope. See [Using Anchor Text](#) for more information on using the anchor feature.

Formatting Properties

- **Text Style:** These options are used to set the font type, size,

and color for the text in this tag. This allows you to match the text formatting in your documents.

Conditional Fields*: See [Using Conditional Fields](#) for more information about conditional fields.

- Parent Tab: Selects the Parent Tab for the Conditional Field
- Parent Value: Sets the value used to activate this field.

Formula Tag: Place this tag on the document where you want to include a calculation. See [Using the Calculated Fields Feature](#) for more information. The following properties can be edited for this tag:

Basic Properties

- Recipient: This shows the recipient associated with the tag. If there are multiple recipients in the envelope, you can use this list to select the recipient associated with the tag.
- Label: A unique identifier for the tag. This is only seen by the sender and in the Form Data for the envelope.
- Tool Tip: The text a recipient sees when they position their cursor over the tag when signing a document. You can specify a tool tip for the tag to provide help for your recipient.
- Formula: This field contains the formula information for the tag.
- Insert Tag Name: A selection list used to select the reference tags to insert into the Formula field.
- Round to decimal places: This sets the number of places shown after the decimal point for the final field value. It can only be set to 2 or 0.
- This is a Payment Amount*: This option designates this tag as a payment tag. See [Using the Payment Processing Feature](#) for more information.

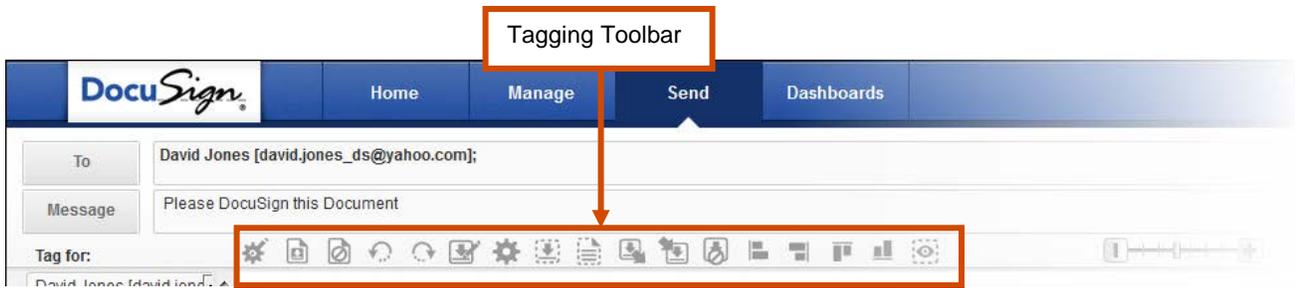


Formatting Properties

- Text Style: These options are used to set the font type, size, and color for the text in this tag. This allows you to match the text formatting in your documents.

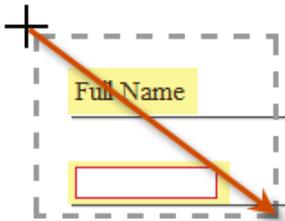
Working with the Tagging Toolbar

The Tagging Toolbar allows you to edit your envelope settings, documents and tags from the Add Tags page. The Tagging Toolbar is on the upper-portion of the Add Tags page, below the message field.



In general, the buttons on the left portion of the toolbar deal with envelope settings and documents, while the buttons on the right portion deal with tags.

You usually need to select one or more tags to use the tag buttons on the toolbar. You can select a single tag by clicking on the tag. You can select multiple tags by holding the **Ctrl** key while clicking on the tags.



To select a specific group of tags, place your cursor crosshair near the tags and then click and drag the cursor over the tags you want to select. You only have to include a portion of a tag to select it.

Selected tags have a blue border to show they are selected.

Each of the buttons on the toolbar are described below:



Edit Settings: Opens the Envelope Settings section, allowing you to edit recipient options, reminders and expirations and sender settings.



Match Templates: The system checks to see if the document matches a template in your system. If a match is found, you have the option of applying a template.



Remove Page: Removes the current page from the envelope.



Rotate Page left 90°: Rotates the current page left 90°.



Rotate Page right 90°: Rotates the current page right 90°.



Identify Recipient Tags: Clicking this button shows the recipient associated with each tag in the envelope.



Edit Tag Properties: Opens the Properties dialog box for the selected tag.



Select All Tags: Selects all the tags on all the documents in the envelope.



Select All Tags on Current Page: Selects all the tags on this page.



Copy Selected Tags: Copies the currently selected tags.



Paste Copied Tags: Pastes any copied tags into the current page.



Delete Selected Tags: Removes all the selected tags from the envelope.



Align Selected Tags: These four buttons align the selected tags to the left, right, top or bottom side of the selected tags.



Create Reading Zone: This allows you to create accessibility reading zones on your documents. See [Using the Accessibility Support Feature](#) for more information.

Using Anchor Text

You can anchor a tag to a word or series of words in your document. This section explains how to add anchor tags to an envelope.

1. Drag and drop the tag on to a document and open the Properties dialog box for the tag.
2. In the Location section of the dialog box, select the **Anchor** checkbox.
3. Type the word or words that you want the tag to be anchored to in the **Anchor Text** field. Note that the words typed in the **Anchor Text** field are case sensitive. Click **Apply** to save and close the change.

The tag is attached to all occurrences of the word(s) in your envelope and the system displays a message saying how many and where the tags were placed. For example, you want to anchor a signature tag to the words Sign Here in your document. Select the **Anchor** checkbox and type "Sign Here" in the **Anchor Text** field. A scan is run on the text in the document. If the scan finds the text "Sign Here" anywhere in the document, it automatically places the signature tag next to the text.

Tags that are anchored have an anchor symbol

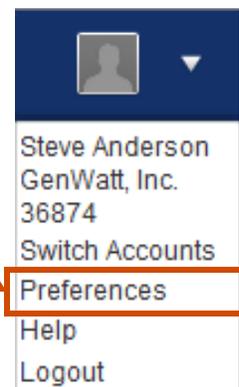


Creating Custom Tags

The information needed for creating a custom tag is similar to the information in the Properties dialog box of a standard DocuSign Tag.

1. From the Classic DocuSign Experience, click your profile image at the top of the application and select **Preferences**.

Select to view your Preferences



The Preferences page is displayed.

- In the Navigation Panel on the left side, under the Member Options section, click **Custom Tags**. The list of your custom tags and shared custom tags is shown.
- Click **Add**, the Custom Tags page appears.

Custom Tags

Your Custom Tags: Shared

Label: Type: Approve

Tool Tip:

Initial Value:

Font: Default

Font Size: Default

Font Style: Default (Regular)

Font Color: Default

Conceal entered value as *** characters

Width (pixels): Height:

Max Characters:

Regex Pattern:

Validation Error:

Anchor:

The Form Field is: Locked Fixed Size Relate to Salesforce

Recipient Note: Include Note in Email

- Type a name for the custom tag in the **Label** field and select the **Type** of tag.

Note: **Label** and **Type** are the only required fields for a custom tag. All other fields are optional and the available fields can change, depending on the type of tag selected.

The **Label** is a unique identifier for the tag that is only seen by the sender. Tags that share the same label will share the same data when entered by a recipient (for example: if you add two data field tags with the labels *Address 1*, when a recipient types data into the first data field tag, the information is automatically copied into the second tag).

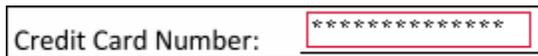
The **Type** list sets the type of information entered in the field and can change the active fields on the page. For example, when a Check Box tag type is selected, the Initial Value, Conceal entered value, Width, Regex Pattern and Validation Error fields are inactive; while selecting a Drop Down List type adds the Items field and the Conceal entered value, Regex Pattern and Validation Error fields are inactive.

If your account is integrated with Salesforce, you can relate this tag to a Salesforce field.

Note: See the *DocuSign for Salesforce Merge Fields* quick start guide for more information about relating a custom tag to a Salesforce object.

- Type the **Tool Tip** for the tag. The tool tip is text the recipient sees when they position their cursor over the tag when signing a document.

6. The other fields that are active in the window depend on the Type selected. These fields have the same properties as standard tags. General information about these fields follows, but
- If the tag Type selected is Drop Down List, add the **Items** for the list. These are the items shown to a recipient in the drop down list. The items must be separated by semi-colons (;). This field is limited to 2000 characters, including the semi-colon separators.
 - You can type an **Initial Value** for the tag. The recipient can change this information unless the **Locked** option is selected.
 - Text Styles: These options are used to set the **Font**, **Font Size**, **Font Style** and **Font Color** for the text in this tag. This allows you to match the text formatting in your documents.
 - If the **Conceal entered value as *** characters** option is active, you can choose to conceal (hide) the information a recipient types into the tag. The information appears normally while the recipient is adding or modifying the information, but the data is not visible to any other signer or the sender. See [Collecting Envelope Form Data](#) for information on how to view and download the concealed tag data. The figure below shows how a concealed tag appears after information is entered into the tag.



- If the **Regex Pattern** field is active, you can use Regular Expressions syntax to format a custom text mask. The custom mask checks the information a recipient types in the field and, if the information does not follow the format, displays the message entered in the **Validation Error** field. For more information on how to build a regular expression, we recommend the following resources:
Regular-Expressions.info — <http://www.regular-expressions.info/>
Wikipedia — http://en.wikipedia.org/wiki/Regular_expression
RegExLib.com — <http://regexlib.com/>
- If the **Validation Error** field is active, type a short message that appears when a recipient incorrectly completes the tag, based on the format of the **Regex Pattern** field.
- Using the **Anchor** field you can anchor the custom tag to a word or series of words in a document. Type a word or words in the **Anchor** field. The tag is attached to all occurrences of the words in the documents in an envelope. Note that the word(s) typed in the **Anchor** field are case sensitive. See [Using Anchor Text](#) for information about anchoring a tag.
For example, you want to anchor a custom tag to the words home address in your document, type "Home Address" in the **Anchor** field. A scan is run on the text in the document. If the scan finds the text "Home Address" anywhere in the document, it automatically places the custom tag next to the text.
- **Required** option: You can choose to make the tag required or optional for the recipient. The default is required.
- **Locked** option: If you provide information for a tag, you can choose to lock the tag, so that the information cannot be changed, or make it editable by the recipient. The default is editable (not-locked).
- **Fixed Length** option: This sets the maximum number of characters for the tag.
- **Shared** option: Select to allow other users to use this custom tag.

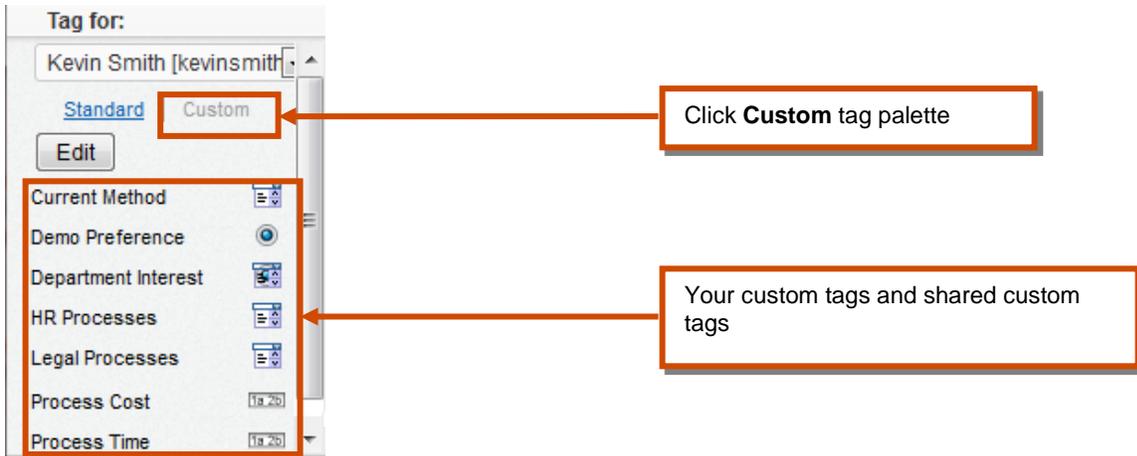
- **Include Note in Email** option: If the tag Type is **Note**, select this option to have the note appear in the email sent to the recipient.

7. Click **Save** to save the custom tag. The custom tag is ready for use.

Adding a Custom Tag to a Document

The method for adding a custom tag to your document is similar to adding a standard DocuSign tag.

1. Start an envelope normally. When you are ready to add a custom tag, click on the **Custom** tag palette, your custom tags and any shared custom tags are shown in the tag palette.



2. Find the custom tag you want to add to the document, then click and drag the tag onto the document and drop it.
3. Finish adding any other tags and send the envelope normally.

Editing Custom Tags

You can edit a custom tag from your Preferences or from the Custom tag palette while adding the tags.

1. Go to the list of custom tags:
 - From the Classic DocuSign Experience, click your profile image at the top of the application and select **Preferences**. In the Navigation Panel on the left side, under the Member Options section, click **Custom Tags**. The list of your custom tags and shared custom tags is shown.
 - If you are adding tags, click on the **Custom** tag palette and click **Edit**. The list of your custom tags and shared custom tags is shown.

Custom Tags							
Your Custom Tags		Add					
<input type="checkbox"/>	Type	Label	Anchor	Shared	Modified by	Last modified	
<input type="checkbox"/>	List	Color Selection	Red;White;Blue	Red	No	Steve Anderson	6/7/2011 10:27:28 AM PT
<input type="checkbox"/>	List	Department Interest	Sales;HR;Legal;Procurement		No	Steve Anderson	
<input type="checkbox"/>	List	Legal Processes	NDA;Non Compete;MSA;All		No	Steve Anderson	
<input type="checkbox"/>	List	Procurement Processes	Vendor Agreements;Statements of Work;Equipment Requisitions;All		No	Steve Anderson	
<input type="checkbox"/>	List	Sales Processes	New Customers;Renewals;Additional Sales;All		No	Steve Anderson	

2. To edit a custom tag, select the check box adjacent to the tag you want to edit and click **Edit** at the bottom of the list. The SecureFields page for the custom tag appears.

Make the changes to the custom tag as needed. Making changes to a custom tag is similar to creating a new custom tag. Refer to the procedure for creating a custom tag for more information about the custom tag fields.

When you have made all of the changes, click **Save** to save the modified custom tag and return to the list of custom tags.

3. To delete custom tags, select the check box adjacent to the tags you want to delete and click **Delete** at the bottom of the list.

Note: If you are not a customer administrator, you can only delete your custom tags. A customer administrator can delete shared custom tags.

The custom tags are removed from the list.

4. When you are finished editing or deleting custom tags, click **Done**. You are returned to the Manage tab.

Advanced Sending Options

This section describes the advanced sending options for DocuSign. The options available depend on your account plan and if the options are enabled for your account.

Using the Payment Processing Feature

The Payment Processing feature allows you to integrate your DocuSign account with your PayPal™ account to collect payments from signers while they are signing an envelope.

You must have a PayPal account to use this feature and you will need to enter some of your PayPal account information in the Classic DocuSign Experience Preferences.

Note: The Payment Processing feature is only supported in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

You must have one of the following PayPal account types to use this feature:

- PayPal Payments Advanced (U.S. only)
- PayPal Payments Pro (U.S. only)
- Payflow Pro (U.S. and Canada only)
- Payflow Link (U.S. and Canada only)

IMPORTANT: DocuSign requires you to enter your PayPal account Partner, Merchant Login (PayPal uses the terms 'Merchant Login' and 'Vendor' interchangeably), User, and Password information. This information is created when you establish your PayPal account and PayPal expects you to manage your credential information. If you do not know this all of this information, contact the PayPal Support Center for assistance.

See the *Using Payment Processing Feature* quick start guide or *Account Administration Reference Guide* for information about setting up your DocuSign account with PayPal.

How It Works

Payment Processing allows you to collect payments through your PayPal account from your signers while they are signing your documents.

After enabling Payment Processing and entering your PayPal account information, you can designate Data Field, Drop Down and Formula tags as payment tags in your envelopes. When creating an envelope or template just place a tag on a document, open the tag Properties and specify that a tag is a payment amount. Multiple tags can be designated as payment amounts in the envelope and they can be assigned to the same or different recipients.

When the recipient opens the envelope and completes all required tags, including signature and initial tags, they are prompted to pay. The signer clicks **Pay Now** to open the Payment dialog, which shows the total amount due and provides the payment methods. If a recipient has multiple Payment Processing tags, all of the amounts in the field are added together for the total amount due. After the signer completes the payment process, they are returned to the envelope to Confirm Signing and complete the envelope.

When a signer completes the payment process, the PayPal payment status is set to pending. If the envelope is declined by a subsequent signer or voided, the PayPal payment status is changed to

Canceled. When an envelope is completed (all signers have signed), the PayPal payment status is changed to Completed. The sender can capture or void PayPal information before envelope completion. If this happens, an email message is sent to the sender and signer.

The DocuSign Envelope ID is included for reference in the PayPal transaction comments section for both the Sender and Signer.

Enabling Payment Processing in an Envelope

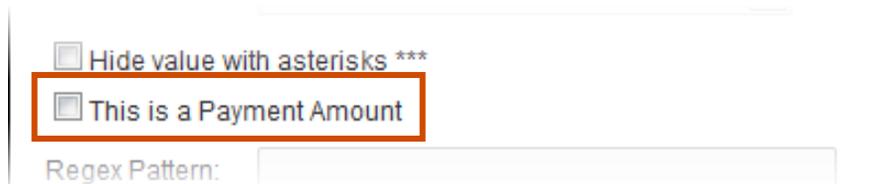
Payment processing can be enabled in Data Field, Drop Down and Formula tags. Multiple Payment Processing tags can be assigned to the same recipient in an envelope. The process for enabling payment processing in a tag is similar to the normal process for creating an envelope and adding tags. The changes are described in the following procedure.

Note: The value of the Payment Processing tag is the amount the recipient is asked to pay and must be a number. The field value can be based on a calculated value using the Calculated Fields feature. See the [Using the Calculated Fields Feature](#) for more information about Calculated Fields.

1. Create a new envelope. Add documents, recipients, Email Subject and Email messages, and select any Envelope Settings normally.
2. Add the tags normally.
3. When you are ready to enable a tag that will have a payment account, select or place the tag and open the Properties for the tag.

Note: Tags that are used as payment tags cannot be shared tags (**Allow All to Edit** cannot be selected for the tags).

Select **This is a Payment Amount**. This designates the tag as a payment tag.



The screenshot shows a dialog box with two checkboxes. The first checkbox is labeled 'Hide value with asterisks ***' and is unchecked. The second checkbox is labeled 'This is a Payment Amount' and is checked. Below the checkboxes is a text input field labeled 'Regex Pattern:' which is currently empty.

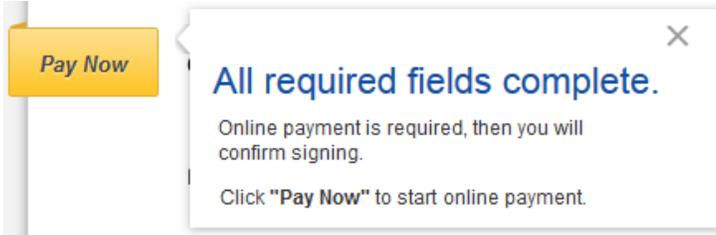
Click **Apply** to save the change.

IMPORTANT: The value of a payment tag must be a number. If multiple tags are enabled for Payment Processing for the same recipient, the values of all of the tags are totaled during the payment process to determine the amount due. If you are using the Calculated Fields feature, be careful that you don't double-charge your recipient by designating a tag for payment and including it again in the formula for a calculated field that is also designated as a payment tag.

4. Complete and send the envelope normally.

What Your Recipient Sees

When the recipient receives the envelope with Payment Processing tags and completes all the required tags, including signature and initial tags, they are prompted to pay. Once the signer clicks **Pay Now**, the envelope will be locked and the signer cannot make changes in the envelope (unless they cancel out of the payment process to return to the envelope).



Clicking **Pay Now** opens the Payment dialog, which shows the total amount due and provides the payment methods. If a recipient has multiple Payment Processing tags, all of the amounts in the field are added together for the total amount due.

Payment

Amount due: \$49.00

› Pay with PayPal

The faster, safer way to pay

› Pay with credit or debit card

Credit card number

Expiration date mm / yy /

CSC
What is this ?

Pay Now

[Cancel](#)

After the signer completes the payment process, they are returned to the envelope to Complete Payment.

Payment

Amount due: \$ 10.00

To confirm your payment and submit your completed document with all supplied data and signatures, please press the "Complete Payment" button. You will have an opportunity to save your copy on the next screen.

Complete Payment

[Cancel Payment](#)

After the signer clicks **Complete Payment**, the envelope is closed and a message window stating the signer has completed the documents is displayed. The signer is given the option of downloading a PDF copy of the documents or printing a copy of the documents.

Using the Calculated Fields Feature

Using DocuSign Calculated Fields you can add tags to your envelopes with formulas that reference other tags and calculate and display the values as recipients make changes.

Note: The Calculated Fields feature is only supported in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

Formula Tag Information and Building Your Formula

The Calculated Fields feature adds the Formula tag to the tag palette. The Formula tag contains the Formula field where the sender can build a calculation using other tags in an envelope or template. The tags used in the formula are called “reference tags.” The special conditions and limitations associated with Formula tags are:

- Formula tags cannot be used if document markup is enabled for the envelope (the **Envelope Setting Allow recipient(s) to edit the document(s)** is selected).
- Formula tags are always locked. Envelope recipients cannot directly enter information into the tags. The Formula tag calculates and displays a new value when changes are made to the reference tag values.
- Formula tags can be used as Payment Processing tags.
- A Formula tag cannot be used as an Anchor tag
- Formula tags only work across multiple documents in an envelope if the Account Administration Features Data Population Scope setting is set to Envelope.

The special conditions and limitations associated with reference tags are:

- Reference tags must use numbers or dates. If a Data Field tag is used as reference tag, it must use the Number or Date mask.
- A reference tag cannot be a shared tag (**Allow All to Edit** cannot be selected for the tag).
- The maximum number of characters displayed in a Formula tag is fifteen.

Tips for Building a Formula

The formulas built in a Formula tag can use the basic math operations of addition, subtraction, multiplication, division and rounding. The operators used in the formula are “+” (plus sign for addition), “-” (minus sign for subtraction), “*” (asterisk for multiplication), and “/” (forward slash for division).

It is important to note that when creating your formula the result for the Formula tag first calculates multiplication and division operations from left to right and then calculates addition and subtraction options from left to right.

Example: The formula: $6+4*2$, gives a result of 14, while the formula: $2*6+4$, gives a result of 16.

You can change the order of calculations by enclosing portions of the formula in parentheses. The operations inside parentheses are calculated first and then the operations outside the parentheses are calculated.

Example: The formula: $2*(6+4)$ gives a result of 20.

Note: If a 0 (zero) is included in a multiplication operation, the system shows 0 (zero) as the tag value. If a 0 (zero) is included in a division operation, the system shows a “Div/0” error as the tag value.

Rounding truncates the displayed result based on the **Round to decimal places** setting in the Formula tag. This setting can be zero or two places after the decimal point. The last number shown is adjusted based on the value of the number that would normally appear after the last number. If that number is 5 to 9, then the last number is increased by 1; if that number is 0 to 4, then the last number is not changed.

Example: With the **Round to decimal places** setting at 2, if a calculated result is 1.047, the displayed result would be 1.05. If the calculated result is 1.044, the displayed result would be 1.04.

Most formulas are built using the Label of reference tags in the formula instead of a number. This allows the inputs to the formula to be variable. It is important to use unique and distinct Labels for the reference tags. The reference tag can be added to the Formula field using the **Insert Tag Name** drop down list (select the tag and click **Insert** to add it) or by typing the tag Label inside brackets([]). The Label for tags that cannot be used as reference tags do not appear in the **Insert Tag Name** drop down list.

Date Tags and Date Operators

Date Signed tags and Data Field tags with a Date mask can be used as reference tags in a Formula tag. There are special operators that can be used with the date information. The operators are explained below, along with some examples of use.

- Day difference calculator: The **DateDiff(d1,d2)** operator provides a number that is the difference between two reference date fields (d1 – d2).
- Current day of month operator: The **Day(d)** operator provides the current day of the month for the referenced date field (d). It will have a value of 1 through 31.
- Days in month operator: The **Days(d)** operator provide the number of days in the month for the referenced date field (d).

Important: The date operators cannot be used with values from drop-down list tags. Additionally, if the date reference tag includes hours, the hours are not used in calculations by the date operators.

Example 1: You have a daily charge (\$5.00) for your service and want to calculate how much to charge a customer for the remaining time in the month, based on the day they sign an envelope (the date signed tag label is “datesigned1”). In the Formula tag Formula field you would type:

$5.00 * (Days([datesigned1]) - Day([datesigned1]))$

Example 2: You have a bike rental service that charges \$25.00 a day for a bike. You can use calculated fields to calculate how much to charge a customer for the rental based on the day the start the rental (“dateout”) and when they return the bike (“datein”). In the Formula tag Formula field you would type:

$DayDiff([datein],[dateout]) * 25.00$

- AddDays operator: The **AddDays(d1,n1)** operator provides a number of days (n1) to add/subtract to a date (d1). To subtract from the date (d1), a “-“ (minus sign) is placed in front of the number of days (n1).

Example 1: If you want to determine the date for one day after a document is signed (where the date signed tag label is “datesigned1”), in the Formula tag Formula field you would type: `AddDays([datesigned1],1)`.

Example 2: If you want to determine the date for one day before the document is signed (where the date signed tag label is “datesigned1”), in the Formula tag Formula field you would type: `AddDays([datesigned1],-1)`.

- **AddMonths operator:** The **AddMonths(d1,n1)** operator provides a number of months (n1) to add/subtract to a date (d1). To subtract from the date (d1), a “-” (minus sign) is placed in front of the number of months (n1).

Example 1: If you want to determine the date for 6 months after the day a document is signed (where the date signed tag label is “datesigned1”), in the Formula tag Formula field you would type: `AddMonths([datesigned1],6)`.

Example 2: If you want to determine the date one month before the day a document is signed (where the date signed tag label is “datesigned1”), in the Formula tag Formula field you would type: `AddMonths([datesigned1],-1)`.

- **AddYears operator:** The **AddYears(d1,n1)** operator provides a number of years (n1) to add/subtract to a date (d1). To subtract from the date (d1), a “-” (minus sign) is placed in front of the number of years (n1).

Example: If you have a lease that starts on the first day of a month and you want it to end in one year on the last day of the previous month (for example, the lease starts on January 1 and ends on December 31) you could the date as follows:

LeaseEndDate tag Formula field = `AddDays(AddYears([datesigned1],1),-1)`

Important: If you use a Formula tag as a reference tag for another Formula tag, the reference Formula tag’s output must be a number. This can be an issue when referring to Formula tags that output information in a date format. However, you can nest operators within a formula to get the same results.

Example: You want use Formula tags to calculate two dates. The first date is two days from the date signed (date1 in the example) and the second date is two months from the first date. Normally the formulas for these tags would be:

Formula1 tag Formula field = `AddDays([date1],2)`

Formula2 tag Formula field = `AddMonths([Formula1],2)`

In this case, Formula2 will cause an error since the tag is expecting a number for [Formula1]. But, you can still calculate the date by nesting the contents of Formula1 in Formula2 as follows:

Formula1 tag Formula field = `AddDays([date1],2)`

Formula2 tag Formula field = `AddMonths(AddDays([date1],2),2)`

Adding Formula Tags to a Document

The process for adding and using Formula tags is similar to the normal process for creating an envelope and adding tags. The changes are described in the following procedure.

1. Create a new envelope. Add documents, recipient, Email Subject and Email messages, and select any Envelope Settings normally.

2. Add tags that will be referenced by the Formula tags. Set the Properties of the reference tags as needed.

IMPORTANT: Because the tag **Label** is used to construct formulas, it is important to use unique and distinct names for the reference tags. Additionally, reference tags must use numbers and if it is a Data Field tag it must use the Number or Date mask.

3. Drag a Formula tag onto the document and open the tag properties.

4. Type a **Label** for the tag.
5. Add the **Formula** information for the tag:
 - Select the tag to be referenced by the formula in the **Insert Tag Name** list and click **Insert**. Alternately, type the Label inside brackets([]) for the tag to be referenced by the formula.
 - Type calculation operators between tags. The operators that can be used in the Formula are + (plus sign for addition), - (minus sign for subtraction), * (asterisk for multiplication), and / (forward slash for division).
 - The formula is calculated from left to right, according to a specific order for each operator in the formula. You can enclose portions of the formula in parentheses to change the order of calculation.
6. Select the **Round to decimal places** option for the calculated field. The selection can be **2** for two places after the decimal, or **0** for zero places after the decimal.
7. Optionally, select **This is a Payment Amount** if the calculated value for the tag should be submitted for payment processing. See the [Using the Payment Processing Feature](#) for more information about Payment Processing.
8. Optionally, set the **Formatting Properties** for the Formula tag.
9. Click **Apply** to save the tag information.

10. Complete adding tags and send the envelope normally.

What Your Recipient Sees

When the recipient receives the envelope and starts the signing process, they can change information in non-formula tags normally. When a recipient updates a tag referenced by a formula tag, the associated formula tags are automatically updated.

Example: In this example, the sender set up a formula tag that multiplies the number of Will's Wonder Widgets by 12.00. When the recipient types the number of widgets, the formula tag calculates and displays the new value.

The recipient types a number.

Description:	Price per Item	Number	Total
Will's Wonder Widgets	\$12.00	<input type="text" value="0"/>	0
Frank's Flawless Flip-Flops	\$15.00	<input type="text" value="0"/>	0

Enter the number of Widgets you want

The Formula tag calculates and updates the result.

Description:	Price per Item	Number	Total
Will's Wonder Widgets	\$12.00	<input type="text" value="3"/>	36.00
Frank's Flawless Flip-Flops	\$15.00	<input type="text" value="0"/>	0

The recipient completes filling out the remaining tags and signs the document normally.

Note: If Payment Processing was enabled for a Formula Tag, the recipient is prompted to pay the amount. See the [Using the Payment Processing Feature](#) for more information about Payment Processing.

Electronic Notary

There might be times when the documents you want to send must be notarized. The DocuSign Electronic Notary feature provides this capability.

Important: The use of electronic notary feature is currently limited to electronic Notaries registered in the State of North Carolina.

The DocuSign electronic notary feature provides two primary functions:

- Allows Notaries to add their electronic notary credential information to their DocuSign account. All of the electronic notary signing sessions completed by the Notary using DocuSign are recorded in the Notary Journal.
- Allows senders to require that documents be notarized. The sender chooses the electronic Notary used in the signing process.

Note: Electronic Notaries must have a DocuSign account. All users are able to enter electronic notary credentials for their account. The ability to request an electronic notary when sending documents is only supported in DocuSign Business, Business Premium, Enterprise, and System Automated (SA) plans. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

How it Works

To use the Electronic Notary feature, the sender creates an envelope and adds documents and recipients as usual. The sender then selects that the signer must sign with an electronic notary and adds the contact information for an electronic Notary to the envelope. The envelope can be sent with tags or for free-form signing, but cannot use the Sign On Paper, Document Markup, Field Markup and Change Signer options.

An email notification is sent to the signer informing them of the request to sign with a notary and to the notary with a request to contact the signer to set up the signing session. Signers can review documents by clicking the link in the email, but cannot initiate the signing process.

To complete documents, the authorized electronic Notary and Signer meet to conduct a signing session that is similar to the existing DocuSign in-person signing session. The Notary initiates the signing process from the email or from the Notary's DocuSign account. The Notary authenticates the Signer just as they would do normally. Then the Signer signs the documents and the Notary applies an electronic notary seal using DocuSign. Information about the signing process is added to the Notary's DocuSign Notary Journal. The whole process remains secure.

See the Electronic Notary Public Information section for information about adding and editing electronic notary credentials and the Notary Journal.

See the [Hosting an Electronic Notary Signing Session](#) section for more information about what the electronic Notary and Signer see and the actions they can take.

Restrictions for using Electronic Notary

The following restrictions apply to using the Electronic Notary when sending documents:

- No other authentication methods can be used when the Sign with Notary option is used.
- The Sign On Paper, Document Markup, Field Markup and Change Signer options cannot be used for the documents.
- Tags cannot be assigned to the notary.
- A credible witness can be used during signing, but the browser used for the signing process must be HTML5 compatible to allow the witness to sign. In general, a credible witness is used if the signer does not have any acceptable forms of identification and must provide a witness to vouch for their identity to the notary. Credible witness requirements vary between states, the Notary is responsible for ensuring that the applicable requirements are followed.

Sending a Document with an Electronic Notary Request

The process for sending an envelope with electronic notary is similar to the normal procedure for sending documents for electronic signatures. The changes are provided in the following procedure:

1. Create a new envelope, add documents and a recipient normally.
2. In recipient **Action** list, select **Sign with Notary**. The notary information lines are added below the recipient.

Signer information

Order	Delivery	Email / Fax	Name	Action	Identify
1	Email	kevinsmith_DS@yahoo.com	Kevin Smith	Sign With Notary	Email
		Notary Email (Required)	Notary Name (Required)	Find a Notary	

3. Type the **Notary Email** and **Notary Name** information. If you have notaries in your DocuSign Address Book you can click the address book icon, select an electronic notary from the list (only contacts that have added electronic notary credentials are shown) and click **Add**.

Important: The Notary Email and Notary Name must exactly match the information in the North Carolina state database.

Alternately, you can search the North Carolina state database for an electronic notary by clicking **Find a Notary** to open the North Carolina state database in a new browser window. Follow the instructions on the database page to find an electronic notary.

4. Add the Email Subject and Email messages, select any Envelope Settings and add tags normally.

Important: The Sign On Paper, Document Markup, Field Markup and Change Signer options cannot be used with the electronic notary feature.

5. Send the envelope.

An email notification is sent to the Signer informing them of the request to sign with a notary and to the Notary with a request to contact the Signer. The Signer can review the documents, but cannot initiate the signing process. The Notary can initiate the signing process when the Signer is available. See the [Hosting an Electronic Notary Signing Session](#) section for more information about what the electronic Notary and Signer see and the actions they can take.

Electronic Notary Certificate of Completion Information

When the electronic notary feature is used, information about the signing session is added to the Certificate of Completion under the Notary Events heading. The information includes the name, email and address for the Notary, the Signer's name, the Sender's name and date/time timestamps for the envelope events.

Notary Events

Ozie Stallworth
 docusign_notary@docusign.com
 Notary address: 11901 Pacemaker Lane
 Huntersville NC 28078
 Notary signer: Dave Dollar
 Notary designated by: Steve Anderson
 Security Level: Email, Account Authentication

Timestamp

Sent: 8/15/2013 2:45:27 PM PT
 Viewed: 8/15/2013 2:59:46 PM PT
 Signed: 8/15/2013 3:00:34 PM PT
 Freeform Signing

Additionally, all the audit trail events are recorded in the envelope History and can be viewed as needed.

Requiring Digital Certificates during Signing

If you are doing business in an industry or region of the world that demands digital signatures, you can leverage DocuSign's expanded digital signature capabilities. With these capabilities, senders can require signers to apply DocuSign-backed or third-party digital signatures.

All DocuSign digital signatures are PKI standards-based, fast to deploy, and easy to use. All digital signatures are fully integrated with our industry-leading Digital Transaction Management (DTM) platform.

In addition to requiring the signer to generate a digital signature by applying a supported digital certificate, once an envelope is complete you can view the completed envelope documents and check the validity of the digital signature.

DocuSign currently supports digital certificates from the following Root Certificate Authorities:

- DocuSign, Inc.
- SAFE-BioPharma, through Verizon Universal Identity Services
- OpenTrust

Note: The ability to request digital certificates is only supported in DocuSign Business, Business Premium, Enterprise, and System Automated (SA) plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

Digital Certificate and Signature Information

Digital signatures use cryptography to prove the identity of a signer and integrity of a document. This cryptography uses Public Key Infrastructure (PKI) technology to issue certificates based on X.509 standards. A trusted third-party, known as a Certificate Authority (CA), performs identity-proofing and issues certificates to represent the digital identity of a signer. When the signer uses a certificate to digitally sign a document, other people (known as relying parties) can trust the digital signature because they trust the CA has done their part to ensure the signer matches their digital identity.

DocuSign currently supports certificates from the following CAs:

- DocuSign Express
- SAFE-BioPharma Digital Certificate through Verizon Universal Identity Services (UIS)
- OpenTrust Protect and Sign

Restrictions and Limitations

There are some restrictions and limitations associated with requesting digital certificates or signatures.

- A digital certificate or signature can only be requested from recipients with a **Signer** or **In Person** recipient action.
- The recipient required to use a digital signature must be the only recipient in their routing order, must have at least one required Signature or Initials tag in the envelope (the envelope cannot be sent for Free-Form signing), and cannot use the Sign On Paper option.

- If the first recipient in the envelope is required to use a digital signature, then all subsequent recipients must be required to use a digital signature and can only have Signature and Initial tags assigned to them. Otherwise the digital signatures for all recipients might be invalidated.
- When using OpenTrust Protect & Sign, the Sender must complete their DocuSign user profile with their legal company name and ensure the Country reflects their actual physical location.
- When using OpenTrust Protect & Sign, the Sender fulfills the role of a Registration Authority (RA) in [OpenTrust Protect & Sign Personal Signature via DocuSign](#) life cycle. In this role, the Sender is responsible for performing identity-proofing on all recipients assigned to a **Signer** or **In Person** recipient action. The Sender must verify the recipients' full name and email address before sending an envelope.
- When using OpenTrust Protect & Sign Digital Signatures, each recipient can only have a combined total of 5 signature and initials tags in an envelope.
- When using OpenTrust Protect & Sign Digital Signatures, you must include a second authentication option (Access Code or SMS Authentication) for the signer. You cannot send the envelope until an option is set.
- The Document Markup, Field Markup, and Electronic Notary features cannot be used in the envelope.
- Envelopes sent requiring a digital signature can be corrected, but this might cause the signature to appear as invalid in some PDF readers.
- Vaulting with eOriginal is not supported for documents with digital certificates and signatures applied.

Sending an Envelope Requiring a Digital Certificate or Signature

The process for sending an envelope requiring a digital signature or certificate is similar to the normal procedure for sending documents for electronic signatures. The additional steps and changes are shown in this procedure.

The process for sending an envelope requiring a digital signature or certificate is similar to the normal procedure for sending documents for electronic signatures. The additional steps and changes are shown in this procedure.

1. Create a new envelope and add documents to the envelope normally.
2. Add recipients normally. You can only require digital certificates or signatures for recipients with a **Signer** or **In Person** recipient action.

Note: When requiring an OpenTrust digital signature, you must enter the validated email address and full name in the Recipient Email and Recipient Name text boxes.

3. For the recipient, click on the **Identify** list and click the **Digital Certificate** list:

- To require the signer apply a DocuSign Express Digital Signature, select **DocuSign Express** from the list. The Digital Certificate checkbox is automatically selected.

The screenshot shows the 'Identify' dialog box. Under the 'Email' section, the 'Email' checkbox is checked. Below it are 'Access Code', '-- Identity Check --', and 'Sign In Each Location' options. The 'Digital Certificate' dropdown is open, showing a list of options: 'DocuSign Express', 'SAFE-BioPharma', and 'OpenTrust'. 'DocuSign Express' is highlighted with a blue selection bar and a red rectangular box.

- To require the signer apply a SAFE-BioPharma certificate, select **SAFE BioPharma** from the list. The Digital Certificate checkbox is automatically selected.

Note: When requiring a SAFE-BioPharma digital certificate from a signer, you should ensure they have or can acquire the digital certificate. DocuSign does not issue certificates for SAFE-BioPharma.

The screenshot shows the 'Identify' dialog box. Under the 'Email' section, the 'Email' checkbox is checked. Below it are 'Access Code', '-- Identity Check --', and 'Sign In Each Location' options. The 'Digital Certificate' dropdown is open, showing a list of options: 'DocuSign Express', 'SAFE-BioPharma', and 'OpenTrust'. 'SAFE-BioPharma' is highlighted with a blue selection bar and a red rectangular box.

- To require the signer apply an OpenTrust digital signature, select **OpenTrust** from the list. The Digital Certificate checkbox is automatically selected.

Note: When requiring an OpenTrust digital signature, you must include a second authentication option (Access Code or SMS Authentication) for the signer. You cannot send the envelope until an option is set.

The screenshot shows the 'Identify' dialog box. Under the 'Email' section, the 'Email' checkbox is checked. Below it are 'Access Code', '-- Identity Check --', and 'Sign In Each Location' options. The 'Digital Certificate' dropdown is open, showing a list of options: 'DocuSign Express', 'SAFE-BioPharma', and 'OpenTrust'. 'OpenTrust' is highlighted with a blue selection bar and a red rectangular box.

4. Add any other authentication options for the recipient using the **Identify** list as needed.
5. Add any other recipients for the envelope. You are not required to set any authentication options or digital certificate requirements for the other recipients.
6. Add the Email Subject and any Email messages, and then select any Envelope Settings.

Note: The Allow recipient(s) to edit the document(s) option cannot be selected.

The email sent to the signer will explain that the signer must provide a digital signature or certificate to complete the envelope. If this is the first time you have required a signer to apply a digital signature or certificate when signing, DocuSign recommends that you include a message or note to the signer about the requirement.

7. Add tags to the documents. Recipients that are required to apply a digital certificate or signature must have at least one required Signature or Initials tag.

Note: The Allow All to Edit option cannot be selected for any tags in the envelope.

8. Complete sending your envelope normally.

The envelope is sent and any recipient with the Digital Certificate requirement must sign the document digitally to complete the envelope.

What the Signer Sees

The email sent to the signer explains that the signer must apply a digital certificate or signature to complete the envelope. When the recipient opens the envelope, they are reminded that they must apply the digital certificate or signature to complete the envelope.

The actions a recipient takes to apply a digital certificate or signature depend on the type of certificate or signature the sender requires.

DocuSign Express Digital Signature

The signer opens the envelope and adds information, initials, and signatures in all the required fields. When the signer is ready to complete the signing process, they click **Confirm Signing** to digitally sign the envelope.

Apply Digital Certificate ×

Please review the fields below to confirm they are correct before completing signing.

Relying Party: Steve Anderson

Signatory Name: Bob Stack

Signatory Email: steve.anderson_ds@yahoo.com

Certificate Type: DocuSign Express Digital Signature

Signing Reason:

Company: *

Location: *

(* = Required Information)

I agree to the terms outlined in the [DocuSign Express Digital Signature Subscriber Agreement](#)



The signer is asked to review and confirm the information, including the Signing Reason, their Company, and Location. The signer must agree to the terms in the DocuSign Express Digital Signature Subscriber Agreement. The signer clicks **OK** to digitally sign the document.

The digital signature information is tracked in the envelope history and Certificate of Completion.

SAFE-BioPharma Digital Signature

The signer opens the envelope and adds information, initials, and signatures in all the required fields. When the signer is ready to complete the signing process, they click **Confirm Signing**.

The signer is then asked to enter their SAFE-BioPharma credentials for authentication and to allow DocuSign to apply their digital certificate to the documents. After the credentials are authenticated, the signer is asked to review and confirm the information, including the Signing Reason, their Company, and Location.

Apply Digital Certificate [X]

Please review the fields below to confirm they are correct before completing signing.

Relying Party: Steve Anderson

Signatory Name: Bob Stack

Signatory Email: steve.anderson_ds@yahoo.com

Certificate Type: SAFE-BioPharma

Signing Reason: I approve this document [v]

Company: Stack Industries *

Location: Waco, TX *

(* = Required Information)

I agree to the terms outlined in the [SAFE-BioPharma Subscriber Agreement](#)

 **OK**

The Industry Standard for Digital Trust

The signer must agree to the terms in the SAFE-BioPharma Subscriber Agreement. The signer clicks **OK** to digitally sign the document.

The digital certificate information is tracked in the envelope history and Certificate of Completion.

OpenTrust Digital Signature

The email sent to the signer explains that the sender requires the document to be digitally signed with a OpenTrust Protect & Sign digital signature to complete the envelope. The signer opens the envelope and adds information, initials, and signatures in all the required fields. When the signer is ready to complete the signing process, they click **Confirm Signing**.

Apply Digital Certificate ✕

Please review the fields below to confirm they are correct before completing signing.

Relying Party: Steve Anderson

Signatory Name: Bob Stack

Signatory Email: steve.anderson_ds@yahoo.com

Certificate Type: OpenTrust

Signing Reason: I approve this document ▼

Company: Stack Industries *

Location: Waco, TX *

(* = Required Information)

I agree to the terms outlined in the [OpenTrust Subscriber Agreement](#)


OK

The Signer is asked to review and confirm the information, including the Signing Reason, their Company, and Location. The signer must agree to the terms in the OpenTrust Subscriber Agreement. The signer clicks **OK** to digitally sign the document.

The OpenTrust information is tracked in the envelope history and Certificate of Completion.

Viewing Certificate Information in Completed Envelopes

There are several ways to see that a digital certificate has been applied to an envelope.

- When viewing the envelope in the Classic DocuSign Experience Summary tab, a Digitally Signed icon and text appears adjacent to the signer information. The icon and text used varies depending on how the document was signed.

 Digitally signed with DocuSign Express

 Digitally signed with OpenTrust Protect & Sign

- If you open a document signed with a DocuSign Express certificate in the Classic DocuSign Experience web application, you can click on icon adjacent to signatures with digital certificates to see more information about the certificate that was applied.

Note: This feature is currently disabled if the document was signed with an OpenTrust certificate.


Secured by DocuSign Express Digital Signature
✕

 **Valid Signature**

Signer Name: Bob Stack

Signer Email: bstack@mailnesia.com

Time Signed: 7/2/2014 7:46:03 AM

 **Valid Digital Certificate**

Authority: DocuSign CA2

Expiration Date: 7/3/2015 5:45:47 AM

Serial Number: 77eff6651a2f4cd69e0ca7ca3aa91dec

[Public Key](#)

[Certification Practice Statement](#)

[Learn more about Digital Signatures at the DocuSign Trust Center](#)

- In the envelope History, there is an entry each time a digital certificate is applied. The order of history events is: the certificate is authorized, the envelope is signed, and finally the certificate is applied to the envelope (not to each document).

2:39:54 PM	(US)) [Web:192.168.11.134]		[documents:(NDA-2.pdf)]	
7/2/2014 2:43:40 PM	Bob Stack (English (US)) [Web:192.168.11.134]	Recipient Certificate Authorized	DocuSign Express digital certificate authorized via Recipient authorization - Reason: I approve this document, Location: Waco TX, Company: Stack Industries	Delivered
7/2/2014 2:43:45 PM	Bob Stack (English (US)) [Web:192.168.11.134]	Signed	Bob Stack signed the envelope	Completed
7/2/2014 2:43:57 PM	Bob Stack (English (US)) [Web:192.168.11.54]	Recipient Certificate Applied	DocuSign Express digital certificate applied	Completed
7/2/2014 2:44:02 PM	Steve Anderson (English (US))	Printable Copy	Steve Anderson was sent the document (NDA-2.pdf) attached to the completed	Completed

- In the Certificate of Completion, there are four entries in the Signer Events section that show Digital Certificate information.

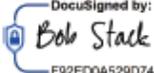
Signer Events

Bob Stack
 bstack@mailnesia.com
 Security Level: Email, Account Authentication (None), Digital Certificate

Signer Certificate Applied:
 Issuer: DocuSign Express Digital Signature
 Signer Certificate Type: DocuSign Express Digital Signature
 Signer Certificate Reason:
 I approve this document
 Signer Certificate Location:
 Waco TX

Electronic Record and Signature Disclosure:
 Accepted: 7/2/2014 2:39:51 PM PT
 ID: 5ded5747-c9c8-48dd-84de-d2e5d49fff9c
 Company Name: GenWatt, Inc.

Signature

DocuSigned by:

 F92ED0A529D747A...
 Using IP Address: 192.168.11.134

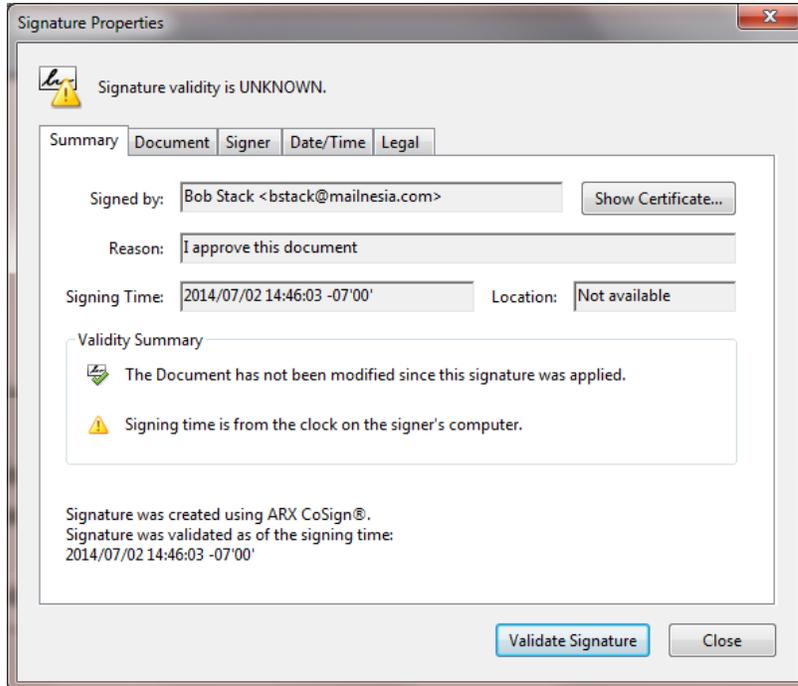
The Signer Certificate Applied entry shows the issuer for the digital certificate.

The Signer Certificate Type entry provides information about the type of digital certificate that was applied.

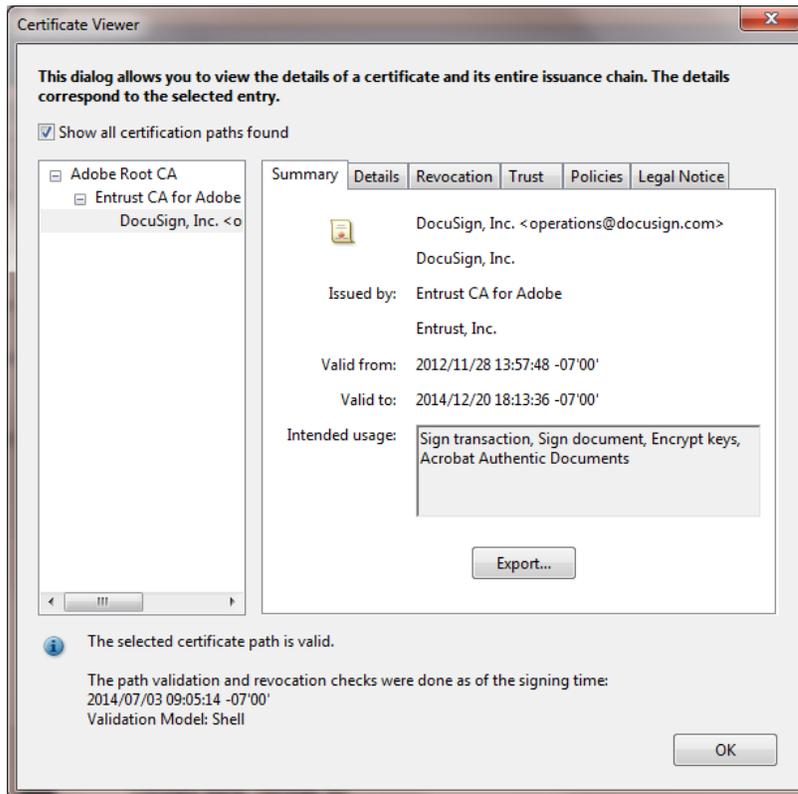
The Signer Certificate Reason entry is the signer selected reason.

The Signer Certificate Location entry is the signer entered information for their location.

- Opening the document with a PDF reader and clicking on icon adjacent to a signature with digital certificates to see more information about the signature properties.
 The information is shown for each signer, but the validity of signer signatures might appear as 'unknown' unless you have trusted the certificate. The DocuSign signature, which is the last item in the list, is always valid.



Additionally, you can inspect the digital signature in popular PDF clients like Adobe Reader to review the Signature and X.509 information for the completed envelope PDF.



Agent Managed Envelopes

There might be times when you, as a sender, must manage a complex, brokered transaction where you do not know the contact information for the all recipients and signers for a transaction. However,

you do know the agents or brokers for those recipients, who can add in the contact information needed to complete the transaction.

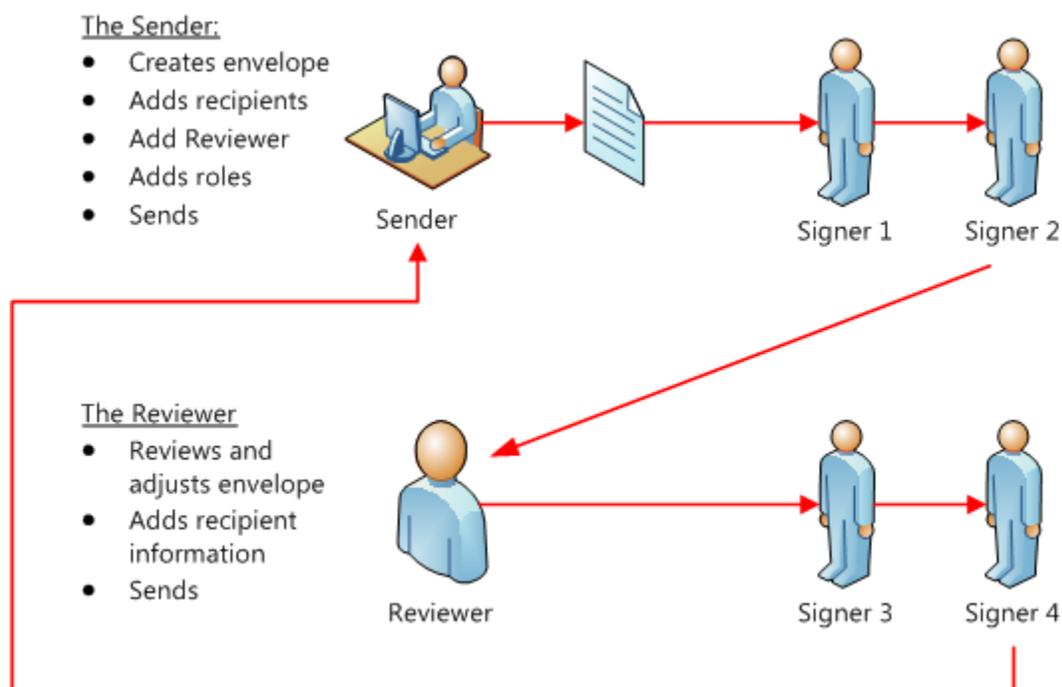
This type of transaction can be completed by using agent managed envelopes in the DocuSign® Service.

Note: Agent managed envelopes are only supported in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

The process for using an agent managed envelope is similar to the standard procedure for sending documents for electronic signatures. This section explains how the process works, the additional steps needed to send an agent managed envelope and what the reviewers for these envelopes see when they receive an envelope.

How it Works

Agent managed envelopes allow the sender to create and assign workflow in a DocuSign envelope without knowing all the recipient information. Using this option, the sender adds recipients and assigns roles, without having to enter name and email information, and assigns a “reviewer” to the envelope. The reviewer is an agent/broker who knows the contact information for the remaining recipients and directs the envelope to those recipients. The reviewer receives and reviews the envelope, adds name and email information for the next recipients, and sends the envelope. After the recipients sign the documents in the envelope, it final version is returned to the original sender. There can be several reviewers and groups of recipients in the workflow. A reviewer can be added after some recipients, but must be added before the recipients that the sender does not have information for. The following figure shows an example of a simple agent managed envelope workflow.



Just as the sender does not know the contact information for all the recipients, the reviewer does not see contact information for recipients that are ahead of the reviewer in the workflow. For example, in the figure above; the Sender does not have the contact information for Signer 3 and 4, so he creates

an envelope, adds the recipients he knows (Signer 1 and 2), adds the Reviewer, adds the roles for Signer 3 and 4 and then sends the envelope. After Signer 1 and 2 sign the document, it is sent to the Reviewer. The Reviewer adds the contact information for Signer 3 and 4 after receiving the envelope, but does not see the contact information for Signer 1 and 2.

Agent managed envelopes allow agents or brokers from both sides of a transaction to manage the signing process through DocuSign, to easily support brokered or channel transactions. Some examples of where agent managed envelopes could be used are:

- In an insurance transaction where the insurance carrier can generate an envelope and send it to an insurance agent for use with customers, without knowing any information for the customers. The insurance agent can later add the customer information and send it to them for signing.
- In a real estate transaction where the buyer's agent can generate documents, send them to the buyers to sign and then hand the transaction off to the seller's agent. The seller's agent then reviews the documents, adds the signer's contact information and sends it to them for their signatures to complete the transaction all in one envelope.
- In a legal transaction where one attorney creates a document for signature, and sends it to a second attorney for review and, if approved, the second attorney can send it to his customers for their signature.

When a sender creates a new agent managed envelope, the reviewer must be added as one of the recipients. There are two recipient Actions that indicate a recipient is a reviewer; **Manage envelope** and **Address recipients**. The recipient Action selected by the sender depends on what changes and additions the sender wants the reviewer to be able to make and the reviewer's access to a DocuSign account. Each type is described below:

- **Manage envelope:** A Manage envelope recipient must have a DocuSign account. This recipient has the same management and access rights for the envelope as the sender and can make changes to the envelope as if they were using the Advanced Correct feature. This recipient can add name and email information, add or change the routing order and set authentication options for the remaining recipients. Additionally, this recipient can edit tags for the remaining recipients. The reviewer must fill out the missing information for the remaining recipients before sending the envelope.
- **Address recipients:** A recipient with the Address recipients Action does not require a DocuSign account, so anyone can be assigned to this Action. This recipient can add name and email information for recipients that appear after the recipient in workflow order. The reviewer must fill out the missing information for the remaining recipients before sending the envelope.

Note: The Address recipients Action is not available if document visibility is enabled. Contact your Account Manager or DocuSign Support (support@docusign.com) for more information about this setting.

After adding a reviewer recipient (a recipient with Manage envelope or Address recipients Action), the sender can add recipients without adding the name and email information for those recipients. If the sender leaves a recipient's name or email blank, the sender must specify a role name for that recipient. If the lock name and email option is enabled for your account, you can lock a recipient's name and email address to prevent the agent recipient from changing them.

Sending an Agent Managed Envelope

The process for adding a reviewer to a workflow is similar to the standard procedure for sending documents for electronic signatures. The additional steps are shown in this procedure.

1. Create a new envelope and add documents to the envelope normally.
2. Add any known recipients normally, when you are ready to add a reviewer:
 - Type the email address and name for the reviewer and click **Add Signer** or **Add CC**.
 - In the **Action** list, select **Manage envelope** or **Address recipients**.

A **Manage envelope** recipient type must have a DocuSign account. This recipient can add name and email information, add or change the routing order and set authentication options for the remaining recipients. Additionally, the recipient can edit DocuSign tags for the remaining recipients. The reviewer must fill out the missing information for the remaining recipients before sending the envelope.

IMPORTANT: A recipient with a **Manage envelope** Action has the same management and access rights for the envelope as the sender and can make changes to the envelope as if they were using the Advanced Correct feature. This recipient Action should be used with care.

An **Address recipients** recipient type does not require a DocuSign account, so anyone can be assigned this Action. This recipient can add name and email information for recipients that appear after the recipient in workflow order. The reviewer must fill out the missing information for the remaining recipients before sending the envelope.

- Optionally, select Authentication Options (Phone Authentication, ID Check and Access Code) for the reviewer.
3. After selecting the Action for the reviewer, the Place Holder Recipient field appears under the normal Recipient fields.

The screenshot shows the 'Recipients and Routing' section of a DocuSign interface. It contains several input fields and buttons. The 'Recipient Email' field has an 'Add Me' button next to it. Below it is the 'Recipient Name' field. There are two buttons: 'Add Signer' and 'Add CC'. Below these is a section titled 'Add Place Holder Recipients for Kevin Smith' which contains a text input field. This field is highlighted with an orange box, and an arrow points from a label 'Role Place Holder field' to it. At the bottom of this section are 'Add Role' and 'Done' buttons.

1. Type the **Place Holder Recipient** role name.
The role name can be as generic or specific as needed and is used as a placeholder for the Email and Name information for a recipient.
2. Click **Add Role**. The placeholder recipient is added to the recipient list.
3. If needed, change the **Order** for the placeholder recipient. The recipient order must be the same as or after the reviewer.

- Optionally, if you know the recipient's email address and name, you can add it; but the email information is not required.

If you enter a recipient's name or email address and the lock name and email option is enabled for your account, you can select the **Email locked** and **Name locked** checkboxes to prevent the Agent (**Manage envelopes** or **Address recipients** recipient type) from changing the recipient's email or name. If the name or email is left blank or if the email is not in a proper email format, the Agent can always edit the information. If the Agent and additional recipients are in the same routing order, the locked checkboxes are ignored.

Note: If the **Email locked** and **Name locked** checkboxes are not available, contact your Account Manager or DocuSign Support (support@docusign.com) to enable this option.

- Optionally, select Authentication Options (Phone Authentication, ID Check and Access Code) for the recipient.

Repeat this step to add any additional recipients.

- Add the Email Subject and Email messages, select any Envelope Settings and add tags normally.
- Send the envelope.

The envelope is sent to any recipients that precede the reviewer in order and then to the reviewer. When a reviewer receives the envelope, what the reviewer sees and the actions the reviewer can take depend on the Action selected for the reviewer. The next two sections describe what reviewers see and the actions they can take.

What a Manage Envelope Reviewer Sees

The recipient assigned as a Manage envelope reviewer receives an email asking them to review the documents in the envelope and to provide contact information for the recipients the reviewer represents for the transaction. The reviewer clicks the **Review Documents** link in the email, is taken to the login page for the DocuSign web application and asked to log on.

After logging on, the reviewer is taken to the document and a message asking them to review and add information for the recipients is presented at the top of the page.

The reviewer can:

1. Review the documents in the envelope by scrolling down through the document.
2. Click **Edit Envelope** to edit elements of the envelope. The reviewer has the same access to the documents as if they were using the Advanced Correct feature. The envelope is opened and the reviewer can make changes to the envelope.

The reviewer follows the same actions that would be taken for editing any other envelope and the Email and Name information for the remaining recipients must be entered here. After editing the envelope, the reviewer sends the envelope normally.

Note that the only elements that can be changed are ones that have not been completed by previous recipients.

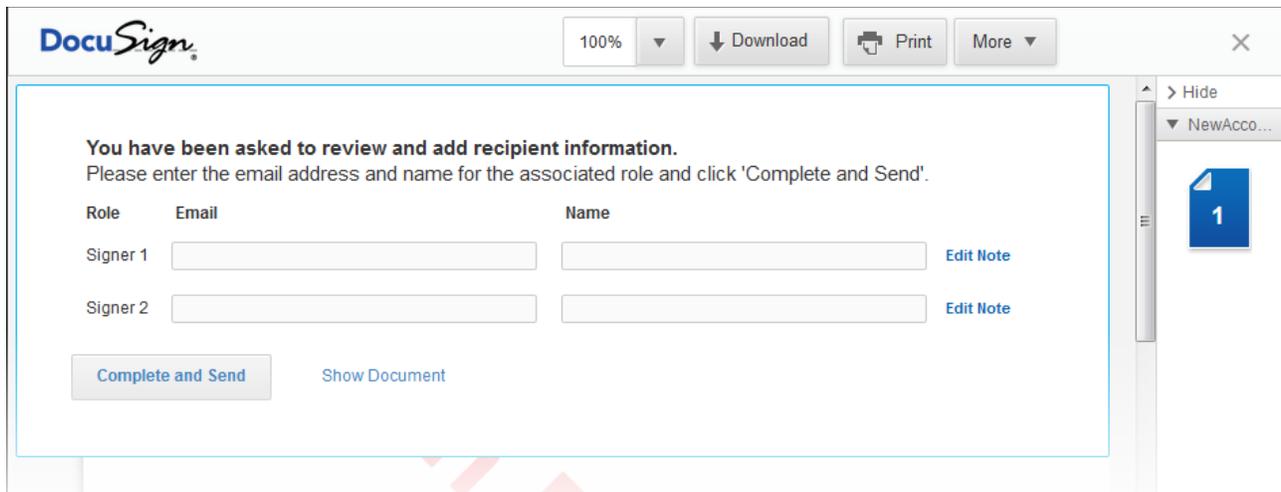
3. Type the Email, Name and, optionally, add a note for the remaining recipients.

After adding the recipient information, the reviewer clicks **Complete and Send** to save the recipient information and send the envelope to the next recipient.

What an Address Recipients Reviewer Sees

The recipient assigned as an Address recipients reviewer receives the email asking them to review the documents in the envelope and to provide contact information for the recipients the reviewer represents for the transaction. The reviewer clicks the **Review Documents** link in the email and is taken to the envelope.

The reviewer might be asked to agree to conduct business electronically and then is taken to the document. A message asking the reviewer to review and add information for the recipients is presented at the top of the page.



The screenshot shows the DocuSign user interface. At the top, there is a navigation bar with the DocuSign logo, a 100% zoom dropdown, and buttons for Download, Print, and More. Below this is a main content area with a blue border. The content area contains the following text: "You have been asked to review and add recipient information. Please enter the email address and name for the associated role and click 'Complete and Send'." Below this text is a table with three columns: Role, Email, and Name. There are two rows of input fields, one for Signer 1 and one for Signer 2. Each row has an "Edit Note" link to the right of the Name field. At the bottom of the form, there are two buttons: "Complete and Send" and "Show Document". On the right side of the interface, there is a sidebar with a "Hide" button and a "NewAcco..." button. Below these buttons is a blue document icon with the number 1 on it.

The reviewer can:

1. Review the documents in the envelope by scrolling down through the document. However, the reviewer cannot make any changes to the documents.
2. Type the Email, Name and, optionally, add a note (using **Edit Note**) for the remaining recipients.

After adding the recipient information, the reviewer clicks **Complete and Send** to save the recipient information and send the envelope to the next recipient.

Using the Intermediary Recipient Feature

There might be times when a sender wants to include a recipient to an envelope that is notified about the envelope and can, but is not required to, add or change some recipient information.

This type of transaction can be completed by adding an intermediary recipient to the envelope.

Note: The intermediary recipient type is only supported in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

The process for adding an intermediary recipient is similar to the standard procedure for sending documents for electronic signatures. This guide explains how the process works, the additional steps needed to send an agent managed envelope and what the reviewers for these envelopes see when they receive an envelope.

How it Works

The intermediary recipient type allows the sender to add a recipient in a DocuSign envelope that is notified about the envelope and can, but is not required to, add or change some recipient information.

The intermediary recipient type can only add or change name, email, access code and note information for the other recipients of an envelope. The intermediary recipient can also void the envelope. An intermediary can access and make changes to recipient information for recipients that have not signed the envelope at any time up until the envelope is completed. An intermediary is not required to have a DocuSign account, so anyone can be assigned to this action.

When a sender creates an envelope, they add the intermediary recipient as one of the recipients and sets the recipient Action to **Manage recipients**.

Important: The **Manage recipients** Action is not available if document visibility is enabled. Contact your Account Manager or DocuSign Support (support@docusign.com) for more information about this setting.

After adding the intermediary recipient, the sender can add other recipients with or without adding the name and email information for those recipients. If the sender leaves a recipient's name or email blank, the sender must specify a role name for that recipient. If the lock name and email option is enabled for the account, the sender can lock a recipient's name and email address to prevent the intermediary recipient from changing them.

Sending an Envelope with an Intermediary Recipient

The process for adding an intermediary is similar to the standard procedure for sending documents for electronic signatures. The additional steps are shown in this procedure.

1. Create a new envelope and add documents to the envelope normally.
2. Add any recipients normally, when you are ready to add an intermediary recipient:
 - Type the email address and name for the intermediary recipient and click **Add Signer** or **Add CC**.
 - In the **Action** list, select **Manage recipients**.

A **Manage recipients** recipient type does not require a DocuSign account, so anyone can be assigned this Action. This recipient can add name and email information for recipients that

appear after the recipient in workflow order. The reviewer must fill out the missing information for the remaining recipients before sending the envelope.

- Optionally, select Authentication Options (Phone Authentication, ID Check and Access Code) for the intermediary recipient.
6. After selecting the Action for the intermediary recipient, the Place Holder Recipient field appears under the normal Recipient fields.
- You can add subsequent recipients normally (typing the name and email information and clicking **Add Signer**) or by typing a **Place Holder Recipient** role name, clicking **Add Role** and, optionally, typing the recipient's email address and name.

The screenshot shows the 'Recipients and Routing' section of the DocuSign interface. It includes fields for 'Recipient Email' and 'Recipient Name', with an 'Add Me' button next to the email field. Below these are 'Add Signer' and 'Add CC' buttons. A section titled 'Add Place Holder Recipients for Kevin Smith' contains a text input field, which is highlighted with a red box. An arrow points from a label 'Role Place Holder field' to this input field. At the bottom of this section are 'Add Role' and 'Done' buttons.

Note: The recipient name and email information is not required.

The screenshot shows the configuration for 'Signer 1'. It includes a dropdown menu for 'Signer 1', a list of 2 recipients, an 'Email' dropdown menu, and input fields for 'JJohnson@home.com' and 'John Johnson'. Checkboxes for 'Email locked' and 'Name locked' are checked.

If you enter a recipient's name or email address and the lock name and email option is enabled for your account, you can select the **Email locked** and **Name locked** checkboxes to prevent the intermediary recipient from changing the recipient's email or name. If the name or email is left blank or if the email is not in a proper email format, the intermediary recipient can always edit the information.

Note: If the **Email locked** and **Name locked** checkboxes are not available, contact your Account Manager or DocuSign Support (support@docusign.com) to enable this option.

- Optionally, select Authentication Options for the recipient.

Note: An intermediary recipient has the option to edit a recipient's authentication access code.

Repeat this step to add any additional recipients.

7. Add the Email Subject and Email messages, select any Envelope Settings and add tags normally.

Note: You cannot add tags for an intermediary recipient. If the intermediary recipient needs to sign or fill out a tag, they must be added as a separate normal recipient.

8. Send the envelope.

The envelope is sent to any recipients that precede the intermediary recipient in the routing order and then to the intermediary recipient and any other recipients at the same routing order level. The next section describes what an intermediary recipient can see and the actions they can take.

What an Intermediary Recipient Sees

The intermediary recipient receives an email asking them to review and complete the recipient information for the envelope recipients. The intermediary recipient clicks **Review Documents** link in the email and is taken to the envelope.

Depending on account settings, the intermediary recipient might be asked to agree to conduct business electronically. A message asking the intermediary recipient to review and add information for the recipients is presented at the top of the page.

Re-Send	Role	Email	Name	
<input checked="" type="checkbox"/>	Signer 1	JJohns@home.com	John Johnson	Edit Note
<input type="checkbox"/>	Signer 2	<input type="text"/>	<input type="text"/>	Edit Note

Buttons: [Send Updates](#) [Void](#) [Show Document](#)

The intermediary recipient can:

- Review the documents in the envelope by scrolling down through the document. However, the intermediary recipient cannot make any changes to the documents.
- Add or change name, email, access code and note information for the other recipients of an envelope that have not signed the envelope.

Note: If a recipient's name and/or email address is locked by the sender, the intermediary recipient cannot change the name or email address.

- Resend an envelope to a recipient by selecting the Re-Send checkbox.
- Void the envelope. This will cause the envelope to show as Declined

Using the Document Markup Feature

There may be times when you need to be able to negotiate different aspects of your documents during the online signing process. For example, sender and signer may want to negotiate the wording of clauses in the document.

Using the DocuSign Document Markup feature recipients can make changes and additions to a document through DocuSign, while managing approval initials from all signers for the changes and maintaining a secure audit trail of the changes.

The markup tool is used to 'white out' (cover up) document text, or to cover up text and add new text over the old text, or just to add new text in a blank region of the document. Changes made by one

recipient must be reviewed and approved by all recipients. Recipients that signed a document before the changes were made are given a new opportunity to review and approve the changes before any document is finalized.

Note: The Document Markup feature is only supported in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

Enabling the Document Markup Feature

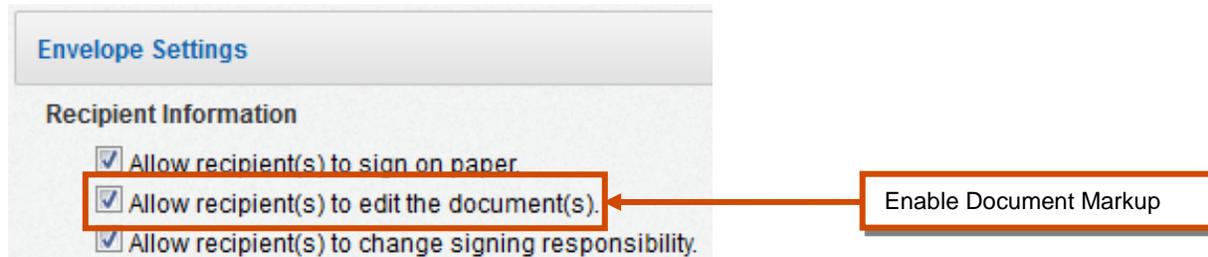
The process for sending an envelope with Document Markup is similar to the normal process for sending an envelope. The changes to the normal process are described in the following procedure.

Note: Document Markup cannot be used with In Person Signing and Calculated Fields. Additionally, Field Markup is allowed on all tags that allow Field Markup, even if **Allow all to edit** is not selected on the individual tags.

1. Create a new envelope. Add documents, recipients, Email Subject and Email messages normally.

Note: You might want to add a note to your recipients informing them that they can use the mark up feature.

2. In the Envelope Settings section, select **Allow recipient(s) to edit the document(s)**. This allows recipients to access the markup tool.

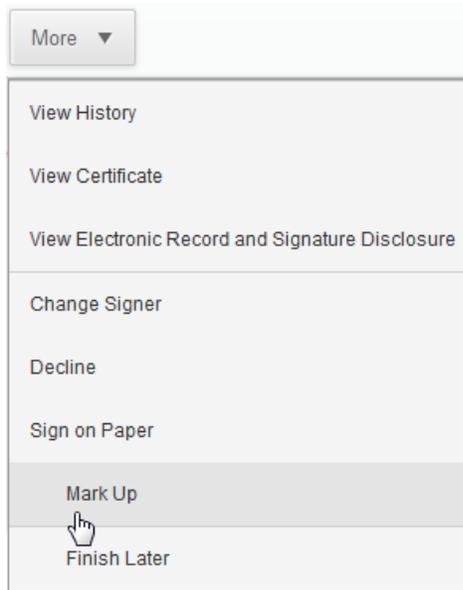


3. Add tags to the envelope and complete sending your envelope normally.
Your recipients receive the request to sign a document and, during the signing process, they have the option to use the Markup tool.

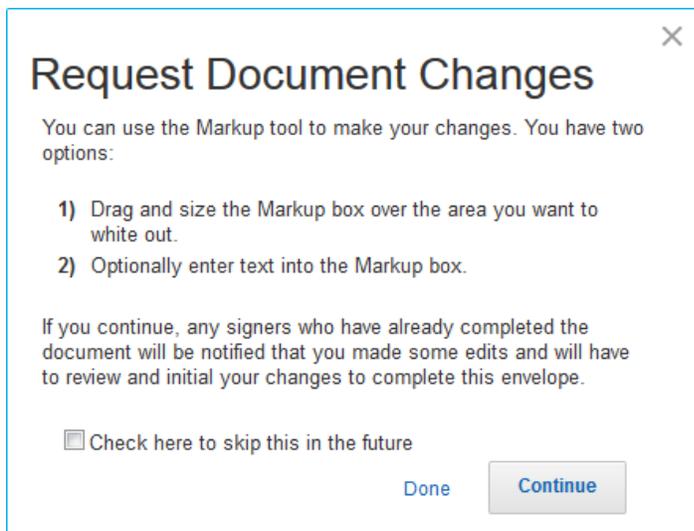
Using the Markup Tool in a Document

When a recipient receives a document with the Markup tool enabled, they can activate the Markup tool and make changes to the document.

1. Click **More** and select **Mark Up** to activate the Markup tool.



The Request Document Changes dialog box appears.

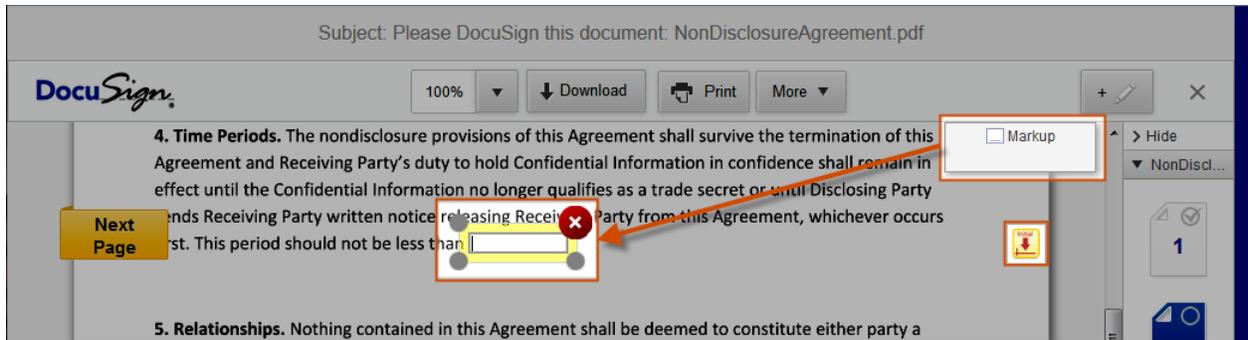


Review the information in the dialog box. Optionally you can select to skip this dialog box in the future.

Click **Continue** to enable the markup, the Markup tool appears under the **+** button on the upper-right side of the document page.



2. To cover a section of text (white out) or add/change a section of text:
 - Click on the Markup tool, drag a markup box onto the document and drop it on the text you want to cover or change.



- Use your cursor to resize the markup box as needed.
- To add new text, click the cursor inside the markup box and type your message.

User Tip: If you are adding text to the markup box, you should resize the markup box to be larger than you think you will initially need. After typing the changes, you can resize the markup box.

3. To edit a markup box, click the cursor inside the markup box and type the changes.
4. To remove a markup box from the document, click on the markup box and drag it off the document.
5. After adding any changes with the Markup tool, initial all the changes.
6. Complete signing the document normally.

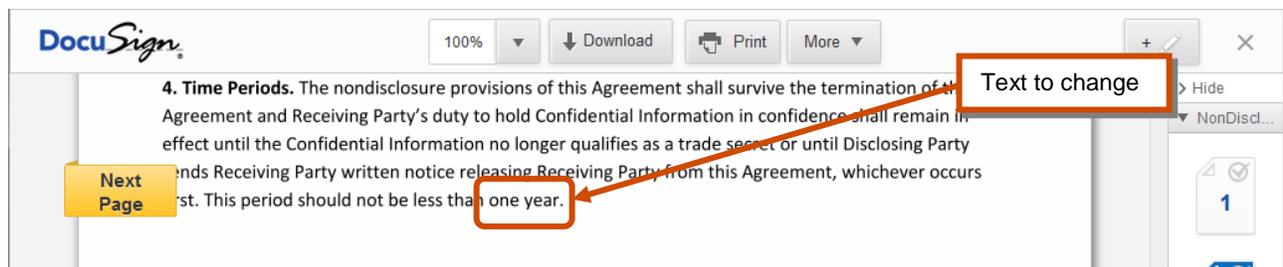
Reviewing a Document with Document Markup Changes

If another recipient makes changes to a document you have signed by adding or changing a markup box, an email message is sent to you saying that there are suggested changes to the document and who made the changes.

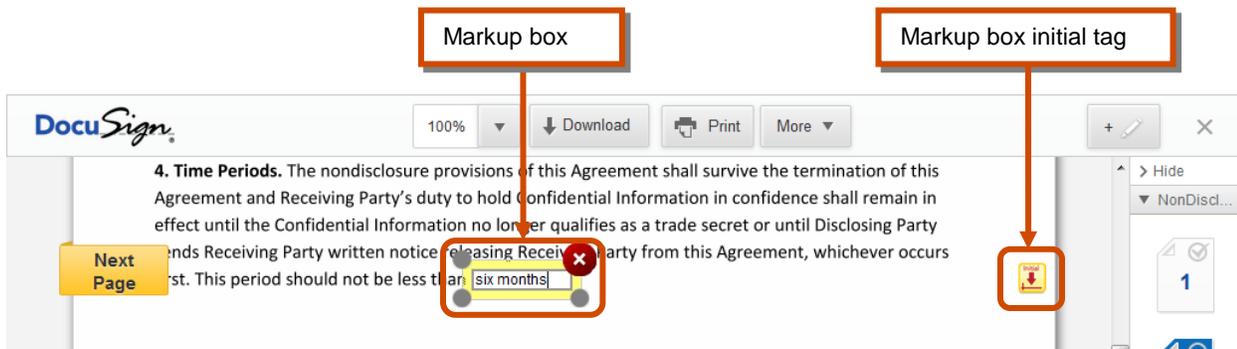
When you open the document, an initial tag is added in the document's right-hand margin of the document on the same line where any changes are located.

Note: If you had added or changed a markup box and that box was modified by another signer, your initials from your previous change are removed from the document. However, the information about the change is retained in the document history.

In the following example, one signer changed the time period from “one year” to ...



... six months by placing the markup box on the text, adding “six months” and initialing the change.



- If you agree with the change, you can initial the change to complete the document.
- If you don't agree with the change, you can make a change to the information in the markup box, add a new markup box, or decline to sign the document. If you make a change or add a new box, you must initial the change or addition.

After initialing any changes or making changes, complete signing the document normally. The envelope is sent to the next recipient and, if there were changes, an email is sent to recipients that previously completed the document.

These changes and counter-changes can go back and forth until all recipients agree to the changes or someone declines to sign the document. All of the changes are recorded in the document history. See [reviewing envelope history](#) for information on accessing the history of an envelope.

Using the Field Markup Feature

There may be times when you want to be able to negotiate small changes to certain aspects of your documents with other signers during the online signing process. For example, a sender and signer may want to propose changes to a closing date or some other small change in the document.

Using the DocuSign Field Markup feature, a sender can allow certain field content to be edited through DocuSign, while managing approval initials from all signers for the changes and maintaining a secure audit trail of the changes.

When Field Markup is enabled for a field, changes made by one recipient can be reviewed and approved by all recipients. Recipients that signed a document before the changes were made are given a new opportunity to review and approve the changes before any document is finalized.

Note: The Field Markup feature is only supported in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

Enabling Field Markup

Only the Data Field, Check Box, Radio Button, and Drop Down tags can be enabled for Field Markup. The process for sending an envelope with Field Markup is similar to the normal process for sending an envelope. The changes to the normal process are described in the following procedure.

Note: Field Markup cannot be used with In Person Signing. Additionally, if Document Markup is enabled for the envelope, Field Markup is allowed on all tags that allow Field Markup, even if **Allow all to edit** is not selected on the individual tags.

1. Create a new envelope. Add documents, recipients, Email Subject and Email messages, and Envelope Settings normally.

Note: You might want to add a note to your recipients informing them that they can use the field markup feature.

2. Add tags for recipients normally.

To enable the tags for markup, drag and drop the tag onto the document and open the Properties dialog box.

Data Field Tag Properties

Recipient: Bob Stack (Step 1)

Allow All To Edit Require Initial Require All

Label: Organization1

Tool Tip: Text

Data

- Select **Allow All To Edit** to enable the tag for markup and collaboration.

By default, **Require Initial** is also enabled when a tag is enabled for markup. This requires that signers that have already completed signing must review any changes to this field and initial the change to complete the envelope.

Optionally, select **Require All** to require that information be entered in this tag in order for the signer to complete the envelope.

Note: The **Require All** property is not included for the check box tag since enabling **Require All** would require that the check box be selected (checked).

- Complete the remaining properties for the tag and click **Apply** to save the changes.

Continue to add other tags as needed.

3. After tags are added, complete sending your envelope normally.

Your recipients receive the request to sign a document and, during the signing process, they have the option to use field markup.

Using Field Markup in a Document

When the recipient reaches the tag (Data Field, Check Box, Radio Button, or Drop Down tag) enabled for editing, either by clicking **Next** or by clicking in the field, and makes a change to the information, a small initial tag appears to the right of the field. This indicates that changing the field information requires initialing the change. The initial tag is placed in the right-hand margin of the document.

An example of this is shown below, with the small initial tag indicating that changes to the field must be initialed by the signer making the change.

all offices at



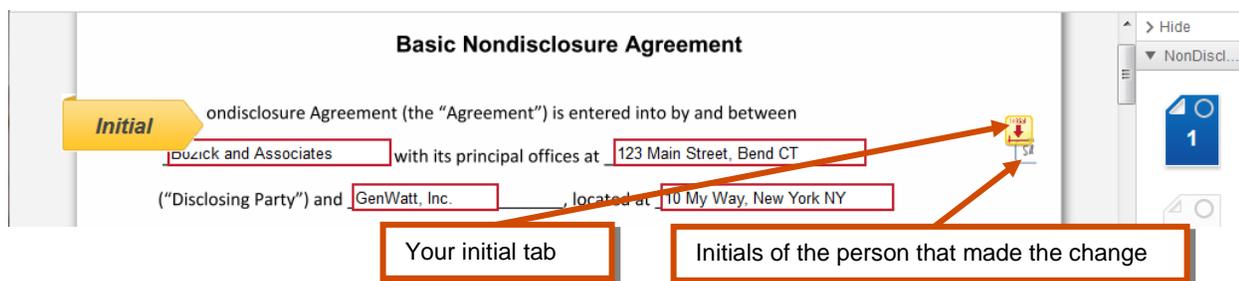
After making a change to the field, the recipient initials the change and completes signing the document.

The document is then sent to the next recipient and to signers that have already completed signing.

Reviewing a Document with Field Markup Changes

If another recipient makes changes to a document you have signed by changing information in a tag, an email message is sent to you saying that there are suggested changes to the document and who made the changes. When you open the document, an initial tag is added in the document's right-hand margin on the same line where any changes are located.

Note: If you had previously made a change to a tag and that tag was modified by another signer, your initials from your previous change are removed from the document. However, the information about the change is retained in the document history.



- If you agree with the change, you can initial the change to complete the document.
- If you don't agree with the change, you can make a change to the information in the field or decline to sign the document. If you make a change, you must initial the change.

After initialing any changes or making changes, complete signing the document normally. The envelope is sent to the next recipient. If a change was made and **Require Initial** was selected for the field, an email is sent to signers that have already completed signing so they can initial any changes.

These changes and counter-changes can go back and forth until all recipients agree to the changes or someone declines to sign the document. All of the changes are recorded in the document history. See [reviewing envelope history](#) for information on accessing the history of an envelope.

Using Conditional Fields

There might be times when the information shown to recipients or information they need to enter should change based on how the recipients respond to a different field. For example, if a recipient indicates that they have different shipping and billing addresses, you will want to collect both addresses in your document or if a recipient selects a certain service option, you might want to display the price for that option.

Using DocuSign® conditional fields you can create dynamic documents that allow customers to make choices that modify content and signing locations, helping to optimize the signer's experience.

Note: The conditional fields feature is only supported in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

How it Works

When a recipient opens a document with conditional fields and changes information for the tag associated with a conditional field (for example: the recipient selects an option, enters text, signs/initials an optional tag, etc.), it triggers a change to the conditional field causing it to appear or disappear in the document.

The DocuSign tag used to trigger the change to conditional fields is referred to as the *Parent Tag*. The Parent Tag can trigger any number of conditional fields based on the information entered or changed in the Parent Tag; this is referred to as the *Parent Value*. A tag that is active as a conditional field can even be used as a Parent Tag for another tag conditional field. However, only certain DocuSign tags can be used as Parent Tags. The tags and the values used to trigger conditional fields are listed below:

Tag used as parent tag	Values used to activate a conditional field
Optional Signature	Signed or Not Signed
Optional Initial	Initialed or Not Initialed
Data Field	Specific text entered, or any text entered, or no text (blank)
Check Box	Checked or Not Checked
Radio Button group	The Value text in the Properties window for each group button
Drop Down	Any value in the list

Conditional fields do not have to be used to enter additional data; they can be used to display additional information. For example, a conditional field could be a locked Data Field tag that shows information text when a particular option is selected.

Adding Conditional Fields to a Document

The process for turning a tag into a conditional field is similar to the normal process for creating an envelope and adding tags. The changes are described in the following procedure.

5. Create a new envelope. Add documents, recipients, Email Subject and Email messages, and select any Envelope Settings normally.
6. Add the tags normally.
7. To enable a tag as a conditional field:
 - Select, or place, a tag and then open the Properties dialog box for the tag.
 - Expand the Conditional Fields section and select the **Parent Tag**. This is the tag that activates the conditional field.

The screenshot shows the 'Conditional Fields' section of a tag's properties dialog. It includes a dropdown for 'Parent Tag' (currently set to '-Select-') and a text input for 'Parent Value'. Red arrows point from labels 'Select Parent Tag' and 'Select Parent Value' to these respective fields.

- Select the **Parent Value** for the Parent Tag. This is the value that activates the conditional field.

For example, if you select a Check Box tag as the Parent Tag, you can select Checked or Not Checked as the Parent Value.

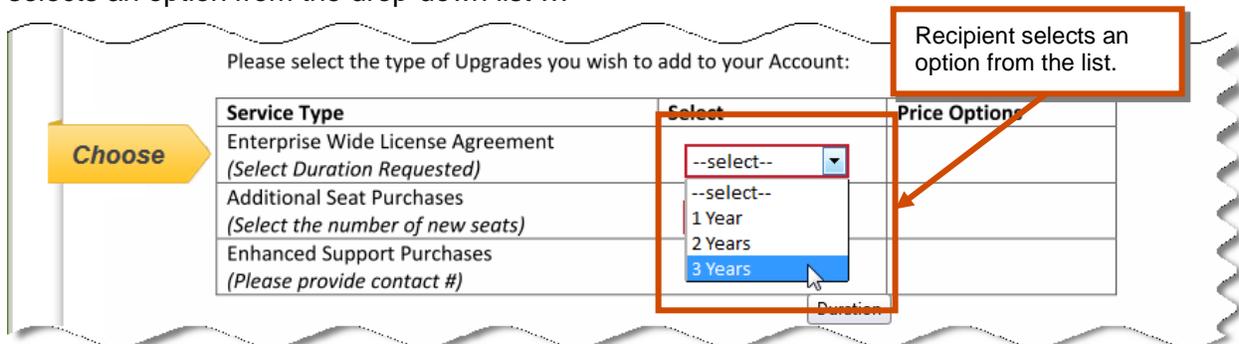
If the Parent Tag is a Data Field tag an additional text field is shown below the Parent Value. You can select the Parent Value of **Specified Text** and then type the specific text that must be entered to activate the conditional field in the field below the Parent Value. Alternately, you can select a Parent Value of **Any Text** and leave the text field blank.

- Finish filling out the remainder of the tag properties, click **Apply** to save the information.
8. Repeat step 3 to add and enable additional conditional fields.
 9. Complete sending the envelope normally.

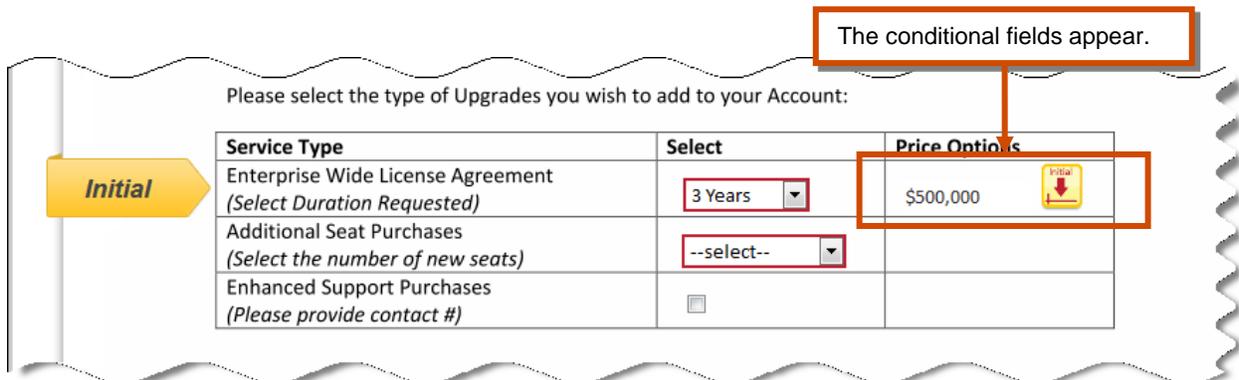
What your Recipient Sees

When the recipient receives the envelope and starts the signing process the tags appear normally. If the recipient changes information in a tag (selects an option, enters text, signs/initials an optional tag, etc.) associated with conditional fields, it triggers a change to the conditional fields causing them to appear or disappear in the document.

Example 1 - New Information Conditional Field: The Enterprise Wide License Agreement drop down list is associated with an information conditional field and initial tag. When the recipient selects an option from the drop-down list ...



The information conditional field and initial tag appear. In this example the conditional field is a locked Data Field tag pre-filled by the sender and used to display information to the recipient.



The recipient completes filling out the remaining tags and signing the document.

Example 2 - New Conditional Data Field: The Enhanced Support Purchases checkbox is associated with a conditional Data Field tag that requests the recipient's phone number. When the recipient selects the check box tag ...

Service Type	Select	Price Options
Enterprise Wide License Agreement (Select Duration Requested)	3 Years	\$500,000
Additional Seat Purchases (Select the number of new seats)	10	\$75
Enhanced Support Purchases (Please provide contact #)	<input checked="" type="checkbox"/>	

The conditional phone number data field tag appears and becomes active for the recipient to complete.

Service Type	Select	Price Options
Enterprise Wide License Agreement (Select Duration Requested)	3 Years	\$500,000
Additional Seat Purchases (Select the number of new seats)	10	\$75
Enhanced Support Purchases (Please provide contact #)	<input checked="" type="checkbox"/>	Enter Phone Number Phone: <input type="text"/>

The recipient completes filling out the remaining tags and signing the document.

Adding Concealed Fields

There might be times when you need to hide sensitive information, such as a credit card number or Social Security number, in a document. Using the concealed field feature, you can conceal the information a recipient types into the field. The information appears normally while the recipient is adding or modifying the information, but the data is not visible to any other signer or the sender when signing or viewing the PDF. Senders or envelope owners, if the envelope is transferred, can download and view the data after the envelope is completed.

The information in the field can be retrieved after the envelope is completed by viewing the Form Data for the envelope.

Only the Data Field tag can be enabled as a concealed field. The process for sending an envelope with concealed fields is similar to the normal process for creating an envelope and adding fields. The changes to the normal process are described in the following procedure.

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

To add a concealed field, select the recipient that will add the information needing to be concealed.

- Drag and drop a data field tag from the tag palette onto the document. Open the Properties dialog box for the tag.
- Type a name for the data field in **Label**. It is important that you give the field an easily identifiable name, since the name is used to identify the field associated with value entered into the concealed field when the data is retrieved.
- If needed, select a **Mask** for the data field and, if needed, add any **Regex Pattern** and **Validation Error** information.
- Select the **Hide value as asterisk ***** check box to enable the conceal field feature for this tag.

Important: When this option is selected, the *Allow All to Edit* option cannot be used.

The screenshot shows the 'Data' field configuration dialog. The 'Hide value with asterisks ***' checkbox is checked and highlighted with an orange border. An orange arrow points from a callout box on the right to this checkbox. The callout box contains the text 'Select to conceal the field characters.' Other fields in the dialog include 'Initial Value', 'Mask' (set to 'Text'), 'Regex Pattern', and 'Validation Error'.

- Click **Apply**.

3. Complete sending your envelope normally.

What Recipients See

When a recipient associated with the concealed field first opens a document, the field appears as normal. After information is entered into the field and the recipient goes to the next field, the information is hidden using asterisks (*) in place of the real data. The sample screenshot below shows how a concealed field appears.

Credit Card Number: *****

The information in the concealed field is hidden from all other recipients and the signer. It can only be retrieved by the sender or envelope owner (if the envelope was transferred) after the envelope is completed by viewing the Form Data for the envelope. See [Collecting Envelope Form Data](#) for information on how to view and download concealed field data.

Using the Fax Out for Signature Feature

There might be times when you need to send documents to a signer that can only accept a fax, but you want to track this through your DocuSign account.

DocuSign can help you manage signatures and transactions across any type of device including fax machines. Fax Out for Signature lets you simply select 'fax' as a delivery option, provide the fax number and let DocuSign execute through completion.

Note: The Fax Out for Signature feature is an optional feature supported in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. This feature might not be enabled for your account. To access this feature, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

How it Works

When the Fax Out for Signature feature is enabled for an account, a new column, named **Delivery**, is added to the Recipients and Routing section of the prepare envelopes page. The Delivery list is used to select the delivery method, Email or Fax, for the recipient. When Fax is selected, the recipient's fax number is entered in the Email/Fax field. Additionally, any email note added for a fax recipient is added to the fax cover sheet sent to the recipient.

When an envelope is sent to a fax recipient, DocuSign adds a fax cover sheet to the envelope and then faxes the envelope to the recipient's fax number. The recipient fills in the appropriate information and signs the faxed documents. Then the recipient uses the return cover sheet to fax the completed documents back to DocuSign. When DocuSign receives the documents, the documents are attached to the envelope and the envelope is completed or sent to the next recipient in the routing order.

For a Carbon Copy recipient, the fax cover sheet and documents are just sent to the recipient's fax number.

The fax operation has a built-in retry logic. If the fax number is busy or rings 10 times without being answered, the system tries to resend the fax 3 minutes later. If that attempt fails, it will try again 5 minutes later and, if that attempt fails, it will try 10 minutes later. If the number is busy or rings 10 times for all three attempts, the fax is considered to have failed. The sender can use Correct to edit the fax number and resend the envelope or just resend the envelope.

If the system gets a voice answer during any fax attempt, the fax is considered to have failed. The sender can use Correct to edit the fax number and resend the envelope or just resend the envelope.

Fax Out for Signature Restrictions and Notes

The following restrictions and notes apply to the Fax Out for Signature feature:

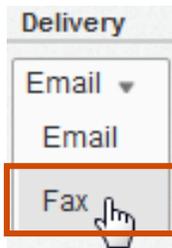
- The recipient of the fax must be the only recipient in the particular routing order. This prevents potential problems with the workflow.
- Signer Authentication (Access Code, ID Check, Phone authentication, Social ID/Live ID authentication) cannot be used for the fax recipient.
- Document Visibility cannot be enabled for envelopes sent with the Fax Out for Signature feature.
- Tags assigned to the fax recipient are ignored.
- Recipients with an Action of **Manage envelope**, **Address recipients** or **Manage envelopes** that are in a routing order before a fax recipient cannot change the Delivery or Fax Number for the fax recipient.
- The fax recipient cannot be changed using Correct after the envelope is sent. Fax recipients cannot be corrected if they are in the current routing UNLESS the fax delivery fails. Fax recipients later in the routing CAN be edited after the envelope is sent.

Sending an Envelope with the Fax Out for Signature Feature

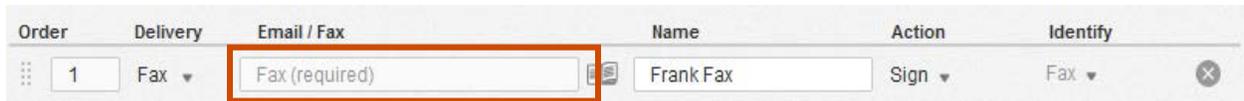
Note: The options and screens shown in your browser might be different from those shown in this guide depending on your account type and options. If you have questions about the options available for your account, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

The process for sending an envelope with a fax recipient is similar to the normal procedure for sending documents for electronic signatures. The differences are explained in this procedure.

1. Create a new envelope.
2. Add documents to the envelope normally.
3. Add recipients normally. When you are ready to add a fax recipient:
 - Type the name for the fax recipient and click **Add Signer** or **Add CC**.
 - In the Delivery list, select **Fax**.



- Type the recipient's fax number in the Email/Fax field.



Note: If the recipient is in your Address Book and has a Fax number entry, the fax number is automatically added for the recipient.

- If you have multiple recipients for the envelope, each fax recipient must be in a different routing order.

To change the 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.

4. Repeat step 3 for any additional recipients.
5. Type an **Email Subject** for the envelope (the subject is limited to 100 characters). Optionally, you can add a custom note for a recipient. The note for a fax recipient is added to the fax cover sheet. To add a note:
 - 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.
6. Add Envelope Settings and tags normally.

Note: Any tags assigned to a fax recipient are ignored and do not appear in the faxed documents.

7. Send the envelope.

The envelope is sent to any recipients in the normal routing order. When the routing order reaches a fax recipient, the documents are faxed to the recipient. When the fax recipient returns the documents, the envelope is sent to the next recipient in the routing order.

Adding Fax Recipients to a Template

The process for creating a template with a fax recipient is similar to the normal procedure for creating a template. The differences are explained in this procedure.

1. Create a new template, add the Template Summary information and documents.
2. Add a Recipient Roles normally. When you are ready to add a fax recipient:
 - Type the name for the fax recipient and click **Add Signer** or **Add CC**.
 - In the Delivery list, select **Fax**.



- Optionally, type the recipient's fax number and name.
- Optionally, set the actions the template sender cannot take with the recipient role.
- If you have multiple recipients for the envelope, each fax recipient must be in a different routing order.

To change the 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.

3. Repeat step 2 for any additional recipient roles.
4. Type an **Email Subject** for the envelope (the subject is limited to 100 characters). Optionally, you can add a custom note for a recipient. The note for a fax recipient is added to the fax cover sheet. To add a note:
 - 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.
5. Add Envelope Settings and tags normally.

Note: Any tags assigned to a fax recipient are ignored and do not appear in the faxed documents.

6. Save the template.

Fax Out History Events and Certificate of Completion Information

For fax recipients, DocuSign records additional information in the envelope history and Certificate of Completion.

The following additional events are recorded in the envelope history:

- When the outbound fax is sent, the Action is set to Sent Invitations and the Activity shows the invitation was sent to the recipient with the recipient’s fax number (instead of an email address).

Example: *[Sender Name]* sent an invitation to *[Recipient Name]* *[Fax Number]*.

- When the fax is received from the signer, the Action is set to Received Fax and the Activity shows the recipient that returned the fax.

Example: Fax received from *[Recipient Name]* that contains paper with hand signature.

Time	User	Action	Activity	Status
5/2/2012 1:40:51 PM PT	Ima Test (English) [API:8.20.114.10]	Registered	The envelope was created by Ima Test	Created
5/2/2012 1:40:55 PM PT	Ima Test (English) [API: 92.168.11.129]	Sent Invitations	Ima Test sent an invitation to Mr Fax [7327091733]	Sent
5/2/2012 1:47:05 PM PT	Mr Fax (English) [API:255.255.255]	Received Fax	Fax received from Mr Fax that contains paper with hand signature	Sent
5/2/2012 1:47:05	Ima Test (English)		Ima Test sent an invitation to Armond Hammer	

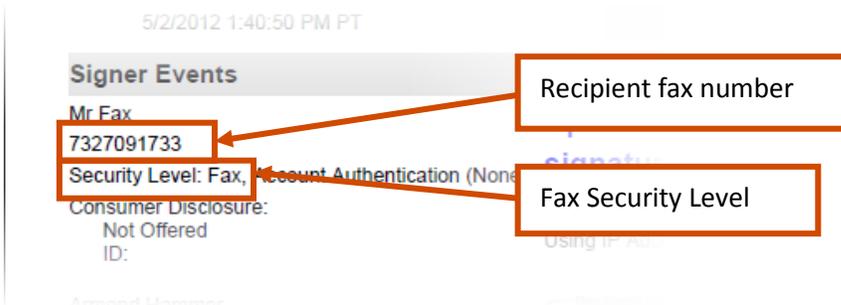
- If the fax delivery fails, the Action is set to Fax Failure recorded and the Activity shows the failure information.

Example: *[Sender Name]* invitation to *[Recipient Name]* *[Fax Number]* failed.

27-06-12 AZT	Betty Spaggett1 (English (US)) [Web:192.168.11.54]	Sent Invitations	Betty Spaggett1 sent an invitation to Mr Fax [7327091733]	Sent
27-06-12 AZT	Mr Fax (English (US)) [API:192.168.11.54]	Fax Failure Recorded	Betty Spaggett1 invitation to Mr Fax [7327091733] failed. Invalid Number.(err:6503)	Sent

The following information is recorded in the Certificate of Completion:

- In the Recipient Information section for the outbound fax recipient, the recipient’s fax number is displayed instead of recipient’s email address.
- The Security Level for the outbound fax recipient shows “Fax” instead of “Email”.



Requesting Documents from your Recipients

Using DocuSign, 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.

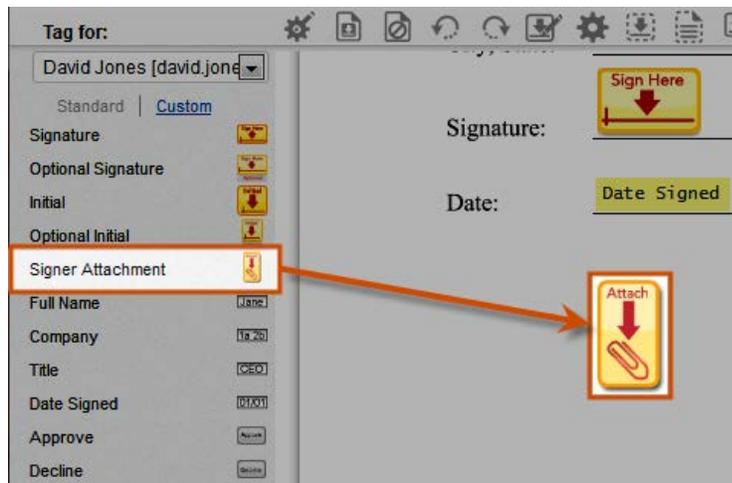
Note: Signer Attachments are only supported in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. This feature might not be enabled for your account. To access this feature, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

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 enabled for your account. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

3. Complete sending your envelope normally.

When your recipient opens the envelope, the note with instructions on how to provide the specified attachment is shown.

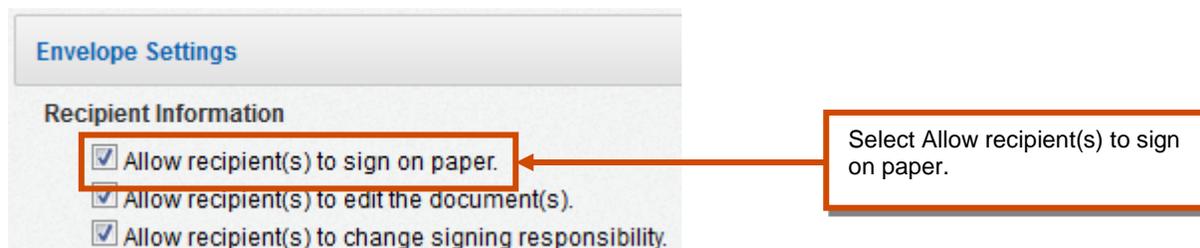
See the [Signer Attachments](#) section for information about what your recipient sees and the actions they can take.

Allowing your Recipients to Sign On Paper

Rather than signing documents electronically, some recipients prefer to sign using pen on paper. Using DocuSign, you can allow those recipients to sign on paper and then provide the document by fax or upload it as an attachment to the DocuSign envelope during the signing process. The Sign on Paper feature allows signers to sign documents on paper, while still allowing you to take advantage of DocuSign's ability to store and manage documents electronically.

The process for enabling a recipient to sign on paper is similar to the standard procedure for sending documents for electronic signatures. The additional steps are shown in this procedure.

1. Create a new envelope. Add documents, recipients, Email Subject and Email messages normally.
2. In the Envelope Settings section, select **Allow recipient(s) to sign on paper**. This allows the recipient to use the sign on paper option.



3. Add tags to the envelope and complete sending your envelope normally.

Your recipient receives the request to sign a document electronically and they are able to select the **Sign on Paper** option.

You will receive an email notification when all signers have completed signing.

See the [Sign On Paper Option](#) section for more information about what your recipient sees and the actions they can take.

Sending for In Person Signing

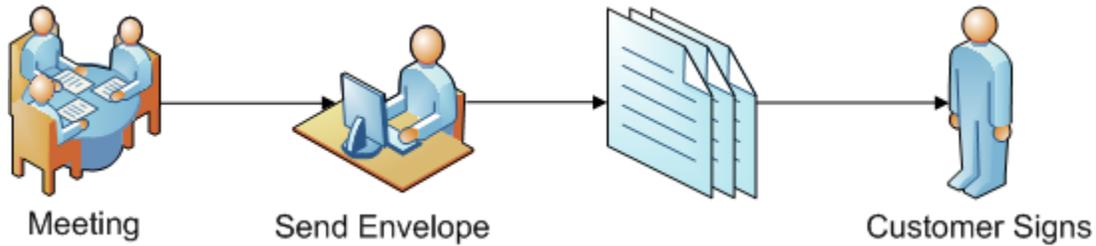
The In Person Signing feature lets you use the DocuSign® Service for electronic signatures even if the signer does not have access to email or a computer.

With the In Person Signing feature you set up an envelope normally, but assign it to a DocuSign user who will act as a *Signing Host* for the process. The signer goes to the same physical location as the signing host; the host then initiates the signing process and then helps the signer complete the electronic documents. After completing the process, the documents can be saved and printed as needed.

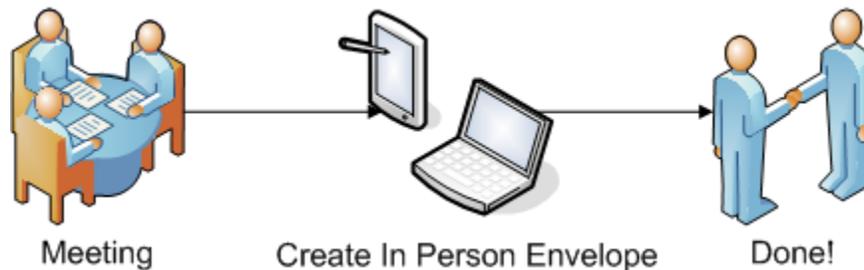
Note: The In Person Signing feature is available to all DocuSign plans, but must be enabled for your account. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

How it Works

In today's busy business environment, there are many times when your customers will be visiting your office or you will be visiting them and you want to get their signature during that visit. For a normal DocuSign envelope, you meet with your customer, after the meeting, you create and send the envelope to your customer and then they would sign the documents when they have access to their email.



With In Person Signing, the whole transaction can be completed face-to-face. You can create an In Person envelope during your meeting, assign yourself as the signing host, start the session and guide your customer through the signing process, completing the whole process during the meeting. After signing, the envelope documents can be saved, emailed to your customer and printed as needed.



Creating and Sending an Envelope for In Person Signing

The process for setting up in person signing is similar to the standard procedure for sending documents for electronic signatures. The steps that are different from the normal process are shown in this procedure.

Note: Document Markup and Field Markup cannot be used with In Person Signing.

1. Create a new envelope and add documents to the envelope normally.
2. In the Recipients and Routing section, add the signing host and signer information.
 - Type the email address and name for the signing host and click **Add Signer** or **Add CC**. The signing host is added to the recipient list.

IMPORTANT: The signing host must have a DocuSign account.

- In the **Action** list, select **Sign in person**. The **Signer Name** field appears.
- Type the name of the signer in the **Signer Name** field. This is the legal name the signer uses for signing documents.

Order	Delivery	Email / Fax	Name	Action	Identify
1	Email	steve.anderson_ds@yahoo.com	Steve Anderson	Sign in person	Email

Annotations in the screenshot:

- A box labeled "Signing Host information" points to the "Name" column containing "Steve Anderson".
- A box labeled "Signer Name" points to the "Name" column containing "Steve Anderson".
- A box labeled "Signer Name goes here" points to the "Name" column containing "Steve Anderson".

3. Optionally, select Authentication Options (Phone Authentication, ID Check and Access Code) for the signing host.

Note: If your account is set up to require an ID Question, the system automatically asks the signing host to type the information into the system before starting the signing process. This information is saved and viewable in the Certificate associated with the completed envelope. Contact your Customer Administrator to determine if there is an ID Question associated with in person signing for your account. If you are an individual user, you are the Customer Administrator and can adjust the question yourself by going to **Preferences** and then **Features**.

4. Add the Email Subject and Email messages, select any Envelope Settings and add tags normally.
5. Send the envelope.

The email notification with the signing request is sent to the signing host. The host can open the email and initiate the signing process when the signer is available.

See the [Conducting an In Person Signing Session](#) section for more information about what the signing host and signer see and the actions they can take.

Using the Sign In Each Location Feature

Normally envelope signers adopt a signature style or write (draw) a signature once when signing documents. However, there might be situations where you need a signer to write their signature and initials in each signature and initial tag. Using the Sign In Each Location option, senders can require signers to draw their signature online either during signature adoption or for every signature.

Note: The Sign In Each Location feature is only available for DocuSign Enterprise and System Automated (SA) Premium plans. This feature might not be enabled for your account. Contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

How it Works

When the **Sender can set Sign in Each Location** feature is enabled, the sender can select to have a signer write their signature and initials in each Signature and Initial tag. This is selected as an option from the Identify list when adding recipients to an envelope.

When the signer opens the envelope and reaches a signature or initial tag, the signer is asked to draw his or her signature or initials instead of adopting a signature style. This is repeated for each signature or initial tag in the envelope.

The envelope history and Certificate of Completion notes when Sign In Each Location is used for a signer. The Certificate of Completion does not have images of the signer's signatures and initials.

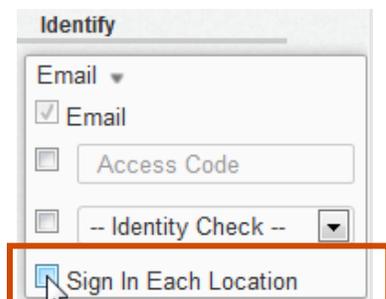
Sending an Envelope with Sign in Each Location

Important: Signers must have a browser that supports HTML5 to write their signature in each signature tag. If the signer does not have an HTML5 browser, they will see a message informing them that they cannot open documents for signing because their browser does not support HTML5.

The process for sending an envelope with Sign in Each Location is similar to the normal procedure for sending documents for electronic signatures. The differences are explained in this procedure.

1. Create a new envelope.
2. Add documents normally.

3. Add recipients normally. When you are ready to add a recipient that must sign in each location:
 - Type the name and email address for the recipient and click **Add Signer**.
 - Select **Sign In Each Location** from the Identify list.



4. Repeat step 3 for any additional recipients.
5. Optionally, type an **Email Subject** for the envelope and add a custom note for recipients.
6. Add Envelope Settings and tags normally.

Note: Free-Form Signing cannot be used if a signer must Sign in Each Location.

7. Send the envelope.

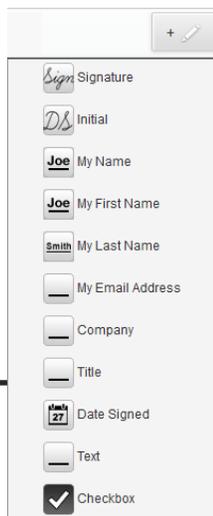
If a signer that is required to write their signature attempts to view an envelope, but does not have an HTML5 browser, it is recorded in the envelope history and the envelope status remains as "Sent" and does not change to "Delivered."

Sending for Free-Form Signing

You can send documents without tags that indicate to your recipients where they should sign, initial or add information in the document. Signing without the assistance of tags is called Free-Form Signing. Sending an envelope for free-form signing is done in the same way as sending an envelope for guided signing, except you do not add any tags to the documents in the envelope.

When recipients open documents sent for free-form signing they can place tags in the document as needed. Recipients use the + menu at the top of the signing page to add tags (Signature, Initial, My Name, My First Name, My Last Name, My Email Address, Company, Title, Date Signed, Text, or Checkbox) to the documents.

To add a signature, initial or other information to a document, the recipient clicks the + menu, selects the appropriate tag (a Signature, Initial, My Name, My First Name, My Last Name, My Email Address, 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 or Initials tag, they are asked to adopt their signature and initials in the same way as guided signing.

The My Name, My First Name, My Last Name, My Email Address, 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 selected checkbox 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.

Using the Bulk Recipient Feature

There might be situations that require a sender to send the same document to a large number of recipients. A typical example is an updated policy document that all employees must review and sign. For these types of situations, you can use the Bulk Recipient feature to send the envelope.

With the Bulk Recipient feature, you simply create a file that contains the list of recipient names and email addresses, start an envelope, select your documents, add the Bulk Recipient file you created as a recipient, tag the documents and send the envelope. Once you send the envelope, DocuSign creates a separate envelope to each recipient in your Bulk Recipient file – eliminating the need to separately create and send an envelope for each signer.

Additionally, you can customize authentication (access code, ID check, phone authentication or social network IDs), add notes and other custom information for each recipient in the list by adding the information to the file.

Note: The Bulk Recipient feature is only available for DocuSign Business Premium and System Automated (SA) plans. Contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

Building a Bulk Recipient File

The bulk recipient file must be formatted as a comma-separated values (CSV) file. You can build a bulk recipient file using most word processing, database, spreadsheet or text edit applications. The most common method is to use a spreadsheet such as Microsoft® Excel®.

Important: The recipients in a bulk recipient file are only assigned the Sign Recipient Action.

You must follow the rules below when building your file:

- The first row of the file is the header row that must have the field names for the file. Each subsequent row represents a unique recipient with the information for that recipient.
- A bulk recipient file can have a maximum of 1,000 recipients.
- If the value you are adding has a comma or double-quotation marks (“”), the value must be enclosed in double-quotation marks (“”). Example: if you have a Title tag and one of the entries is Inside Sales, NE you would type “Inside Sales, NE” in the Title column for that recipient.

Tip: If you are using Excel to create your file, you do not need to add commas or double-quotation marks in the columns, just type the information and save the file as a CSV file. Excel will automatically add the double-quotations when you save the file.

- The characters: <, >, # or & cannot be used the file.
- Only certain field names are supported in the bulk recipient file.

Note: If you have previously used bulk recipient files in the DocuSign Professional Desktop Client, portions of the files can be used with the web application bulk recipient feature. Refer to the [DocuSign Professional Desktop Client Bulk Recipient Files](#) section for more information.

You must include columns for recipient **Name** and **Email**. All other columns are optional. Information in the CSV file takes precedence over data that a sender adds to a field when sending an envelope or creating a template. If you are cutting and pasting information into a new file, verify that no extra spaces are included in the pasted result, since this can cause errors in the new file. The list below shows the column headers supported in a bulk recipient file:

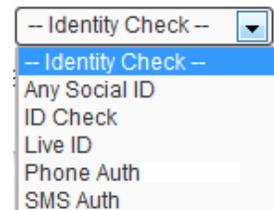
Name: The recipient's name. This field and column is required.

Email: The recipient's email address. This field and column is required.

Note: This is a note sent only to the recipient.

AccessCode: If blank, this recipient is not required to enter an access code before opening the envelope. If a value is provided, the recipient must enter the value as the access code to view and sign the envelope.

Identification: If blank, the envelope does not require any other recipient authentication. If a value is provided, it is the type of authentication used for the recipient. The possible values for this field are: AnySocialID, ID Check, Live ID, Phone Auth and SMS. With the exception of SMS authentication (which uses the value SMS) the field value must exactly match the information that appears in the Identity Check list for your account.



Phone Auth enables phone authentication, SMS enables SMS authentication and ID Check enables the normal ID check authentication for your account. The other values are used with social ID authentication. Your account must be configured to use the authentication method listed.

PhoneNumber: This column is only valid if **Identification** field Uses Phone Auth or SMS. The value for this field can be a valid telephone number or, for Phone Auth, "usersupplied" (SMS authentication cannot use a user supplied number). If "usersupplied" is used, the recipient supplies his or her own telephone number.

DocuSign Tag Name: You can add a column to set the values of DocuSign tags on documents in the envelope. The title of the column must be the same as the DocuSign tag Label, as it appears in the tag Properties dialog box. The tag name is not case-sensitive. The values entered in this column are automatically inserted into the corresponding DocuSign tag for the recipient in the same row.

Example: You are adding a tag with the recipient's street address (tag Label is "address1") and you want to pre-fill the tag when it is sent. Add a column with the column title "address1" and add the address information in the appropriate row for each recipient.

The following figure shows an example of a Bulk Recipient file in Excel.

	A	B	C	D	E	F	G
1	Name	Email	Note	AccessCode	Identification	PhoneNumber	address1
2	David Jones	david.jones_ds@yahoo.com	Here is the document we discussed.		ID Check		123 Main St
3	Kevin Smith	kevinmith_DS@yahoo.com		2243			697 My Way
4	Elisabeth Bozick	elisabeth.bozick@yahoo.com			Phone	usersupplied	827 1st Ave

Sending an Envelope with a Bulk Recipient

When you add a bulk recipient file to an envelope, you are replacing a single recipient entry with a file that contains many recipients. An envelope with a bulk recipient can also contain other individual recipients, but there can only be one bulk recipient file associated with an envelope. The recipients in a bulk recipient file can only be assigned a Sign Recipient Action.

The process for sending an envelope with Bulk Recipients is similar to the normal procedure for sending documents for electronic signatures. The additional steps are shown in this procedure.

Important: You cannot specify a unique Custom Envelope Field for a specific recipient in a bulk recipient file. You can specify Custom Envelope Fields for the entire envelope so that all envelopes sent from the bulk recipient file will have the same envelope custom fields. Also, bulk recipients cannot be used with mobile sending, In-Person signing, or as a recipient for agent managed envelopes.

1. Create a new envelope.
2. Add documents to the envelope normally.
3. If you want to add a recipient before the Bulk Recipient file recipients, add the recipient normally.

Reminder: You can add non-bulk recipients later and change the routing order as needed.

4. Click **Add Bulk Recipient**. Select and upload the bulk recipient CSV file for the envelope.

5. The file is uploaded and the information is shown in the Bulk Recipient List.

Note: If an error message is shown, refer to the [Bulk Recipient File Errors](#) section for more information about the message.

Bulk Recipient List						
	Name	Email	Note	AccessCode	Identification	PhoneNumber
1	David Jones	david.jones_ds@yahoo.com	Here is the document we discussed.		ID Check	
2	Kevin Smith	kevinmith_DS@yahoo.com		2243		
3	Elisabeth Bozick	elisabeth.bozick@yahoo.com				

[Close](#)

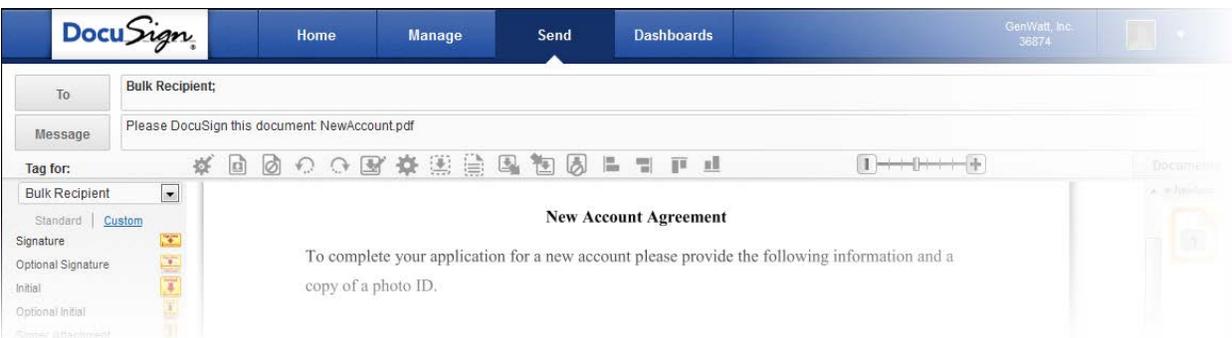
Review the information in the list. If it is correct, click **Close** and continue sending the envelope.

If the information in the list is not correct; click **Close**, correct the file, return to the envelope and click **Edit Bulk Recipient**. Select the corrected bulk recipient CSV file.

- A Bulk Recipient line is added to the Recipients and Routing list. You can open and view the Bulk Recipient List by clicking the bulk recipient icon.



- If you want to add a recipient after the bulk recipient file recipients, add the recipient normally.
- Add the Email Subject, Email messages and select any Envelope Settings normally. Click **Next** to add tags.
- On the Add Tags page, select **Bulk Recipient** in the **To** line or **Tag for:** list and then click and drag a tag from the palette and drop it on the document.



Open the tag properties and modify the tag information as needed.

Reminder: When adding tags that have information in the bulk recipient file, ensure that the Label name used for the tag is the same as the one used in the file.

- After adding all the needed tags, you can Preview and Send the envelope normally.

The system sends a separate envelope to each recipient in the bulk recipient file. The envelopes are listed as separate envelopes in the Sent folder in the **Manage** tab.

If envelope information needs to be corrected, you will use the Correct feature for each individual envelope.

Creating a Template with a Bulk Recipient

The process for creating a template with bulk recipients is similar to the normal procedure for creating a template. The additional steps are shown in this procedure.

Note: Templates with bulk recipients cannot be used with PowerForms.

1. Create a new template, add the Template Summary information and documents.
2. If you want to add a Recipient Role before the bulk recipient file recipients, add the role normally.

Reminder: The template can have multiple recipient roles, but you can only upload one bulk recipient file per template. You can add non-bulk recipients later and change the routing order as needed.

3. Type the Recipient Role for the bulk recipients and click **Add Bulk Recipient**.

Select and upload the bulk recipient CSV file for the template.

Note: The bulk recipient CSV file can be changed by a user when sending the template.

4. The file is uploaded and the information is shown in the Bulk Recipient List.

Note: If an error message is shown, refer to the [Bulk Recipient File Errors](#) section for more information about the message.

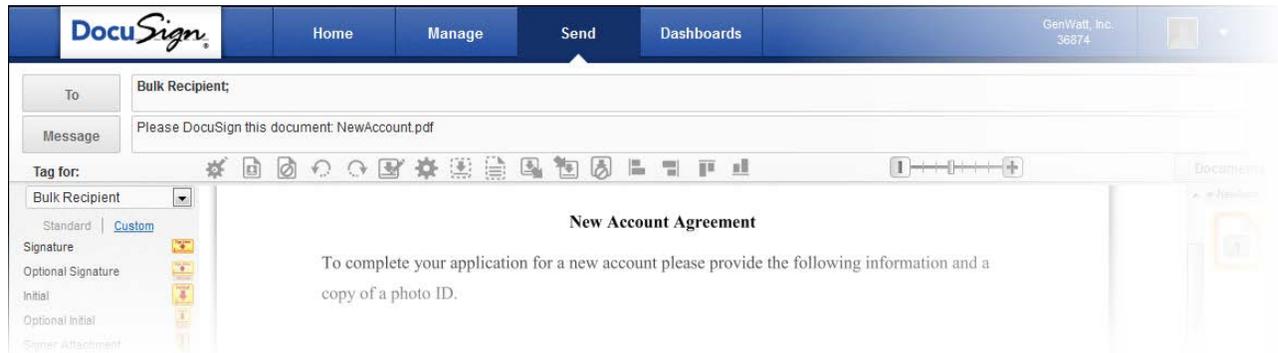
Bulk Recipient List						
	Name	Email	Note	AccessCode	Identification	PhoneNumber
1	David Jones	david.jones_ds@yahoo.com	Here is the document we discussed.		ID Check	
2	Kevin Smith	kevinmith_DS@yahoo.com		2243		
3	Elisabeth Bozick	elisabeth.bozick@yahoo.com				

[Close](#)

Review the information in the list. If it is correct, click **Close** and continue creating the template.

If the information in the list is not correct; click **Close**, correct the file, return to the template and click **Edit Bulk Recipient**. Select the corrected bulk recipient CSV file.

5. If you want to add a recipient or recipient role after the bulk recipient file recipients, add it normally.
6. Add the Email Subject, Email messages and select any Envelope Settings normally. Click **Next** to add tags.
7. On the Add Tags page, select **Bulk Recipient** in the **Roles** line or **Tag for:** list and then click and drag a tag from the palette and drop it on the document.



Open the tag properties and modify the tag information as needed.

Reminder: When adding tags that have information in the bulk recipient file, ensure that the Label name used for the tag is the same as the one used in the file.

8. After adding all the needed tags, you can Preview and Save the template normally.

Sending from a Template with Bulk Recipients

The process for creating a template with bulk recipients is similar to the normal procedure for creating a template. The additional steps are shown in this procedure.

1. Create a new envelope and upload the template you want to use.
2. Review the bulk recipient file attached to the template by clicking the Bulk Recipient icon.



The Bulk Recipient List is opened.

Bulk Recipient List						
	Name	Email	Note	AccessCode	Identification	PhoneNumber
1	David Jones	david.jones_ds@yahoo.com	Here is the document we discussed.		ID Check	
2	Kevin Smith	kevinmith_DS@yahoo.com		2243		
3	Elisabeth Bozick	elisabeth.bozick@yahoo.com				

[Close](#)

- If the recipient information listed in the file is correct, click **Close**.
- If the information needs to be updated, click **Close** and click **Edit Bulk Recipient**. Select and upload the correct bulk recipient CSV file for the envelope.

3. Complete sending the envelope normally.

Bulk Recipient File Errors

If the bulk recipient file you want to upload has errors, the file is not uploaded and an error message is displayed. The error message displays the file row with the error and an error description. The messages are described below. The information in the brackets ([]) is a variable that changes with the error information.

- **[Field]: Must not be blank.** You must add a value to the field before the file can be used.
- **[Field]: exceeds max length of [Value] chars.** The provided value has too many characters. The value must be shortened before the file can be used.
- **You have exceeded the maximum number of 1000 recipients.** The file has more than 1,000 recipients. A Bulk Recipient file can have a maximum of 1,000 recipients.
- **[Field]: contains invalid characters.** The value in the field has one or more of the following characters: <, >, # or &. The character must be removed before the file can be used.
- **[Field]: invalid email format.** The email format is not in the standard XXX@XXX.XXX format. The email must be corrected before the file can be used.
- **[Field]: '[Value]' not a valid Identification.** The value must be one of the identification methods listed in the [Building a Bulk Recipient File](#) section.
- **[Field]: account not configured for [Value].** Your account is not configured to use the listed recipient authentication method. Contact support if you feel this is an error.
- **PhoneNumber: must contain valid phone.** If the identification entered was “phone” the value for this field must be a valid telephone number or “usersupplied”.
- **File must contain a [Column] column.** The file does not contain the required Name or Email column. You must add this column before the file can be used.
- **[Column] is not a supported column.** The file contains a column that is not supported by the Bulk Recipient feature. You have probably tried to upload a DocuSign Professional desktop client file. See the following section for more information about the columns that are not supported in the Bulk Recipient feature.

DocuSign Professional Desktop Client Bulk Recipient Files

In some cases, Bulk Recipient files used with the DocuSign Pro desktop client can be used with the DocuSign web application. The DocuSign Pro fields that are NOT supported in the web application are: EnvelopeField, EnvelopeNumber, Subject, Message, RecipientNumber and IDCheck.

If one or more of these columns is in the uploaded file, the error message “[Column]] is not a supported column” is displayed.

If you are cutting and pasting from a DocuSign Pro bulk recipient file, verify that no extra spaces are included in the pasted result. This can cause errors in the new file.

Using Document Visibility

There might be times when you need to send an envelope to several recipients, but you only want each recipient to see the documents they must sign, not all the documents in the envelope. This can be accomplished using the DocuSign® Document Visibility feature.

Document Visibility controls document access by limiting who can view documents in an envelope. When Document Visibility is enabled, documents with DocuSign tags can only be viewed by signers that have a tag on that document. Recipients that have an administrative role (recipients with an Action of Manage envelopes, Address recipients, Manage recipients, Receive a copy or Acknowledge receipt) can always see all the documents in an envelope, unless they are excluded when an envelope is sent. Documents that do not have tags are always visible to all recipients, unless they are excluded when an envelope is sent.

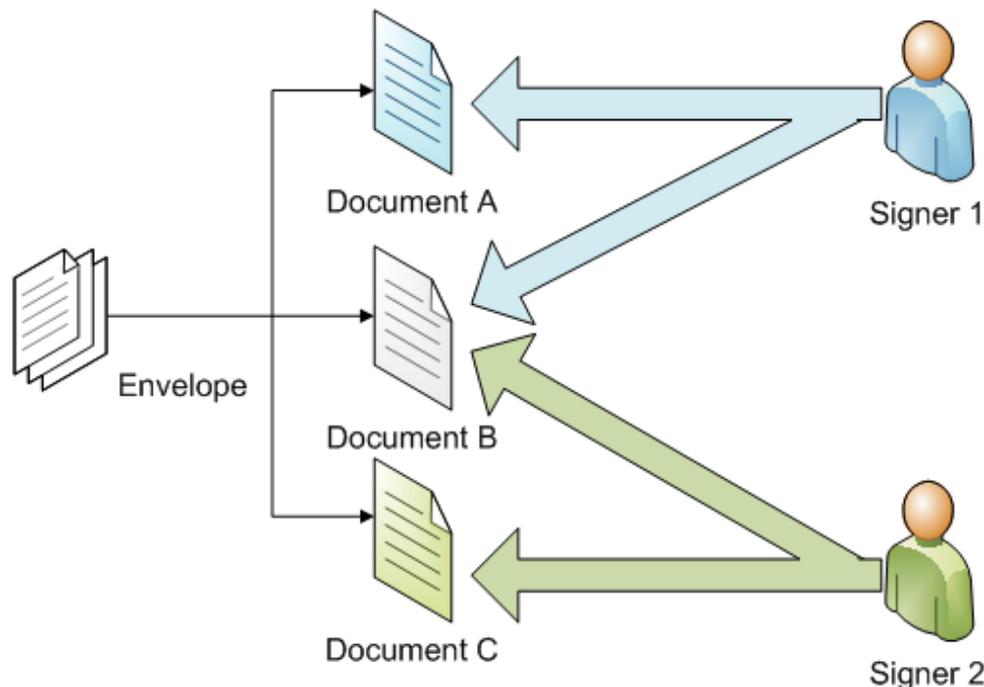
Note: The Document Visibility feature is only supported in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. Your current account might not support this feature. To access this feature, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

How Document Visibility Works

Document Visibility allows the sender to create an envelope with multiple documents and limit the documents recipients can see. This way the sender only has to send one envelope with all the documents, rather than sending multiple envelopes with only a few documents.

For example, a sender needs to send three documents for signing. One document needs to be signed by both signers, while the other two just need to be signed by each of the signers. Instead of sending three envelopes, each with one document, the sender can send all of the documents in one Smart Envelope.

The following figure provides an illustration of a simple Smart Envelope usage. In this example Signer 1 needs to sign Document A and B, while Signer 2 needs to sign Document B and C. The sender does not want Signer 1 to see Document C and Signer 2 does not need to see Document A.



To accomplish this Document Visibility is enabled for the account, the sender creates an envelope with all three documents, places signature tags for Signer 1 on Document A and B, places signature tags for Signer 2 on Document B and C, and then sends the envelope. When Signer 1 receives the envelope, only Document A and B are visible and can be signed. When Signer 2 receives the envelope, only Document B and C are visible and can be signed.

Recipients that have an administrative role (recipients with an Action of Manage envelopes, Address recipients, Manage recipients, Receive a copy or Acknowledge receipt) can always see all the documents in an envelope, unless they are excluded when an envelope is sent. Documents that do not have tags are always visible to all recipients, unless they are excluded when an envelope is sent.

If Document Visibility is enabled for your account by DocuSign, customer administrators can set the Document Visibility option for the account. Check with your local administrator to see which option is available for your account.

Using Document Visibility in an Envelope

The process for using Document Visibility is similar to the normal process for creating and sending an envelope. The changes to the normal process are described in the following procedure.

1. Create a new envelope. Add documents, recipients, Email Subject and Email messages normally.
2. Optionally, in the Envelope Settings section, select **Must be a signer to view signed documents**, to enable Document Visibility for the envelope.

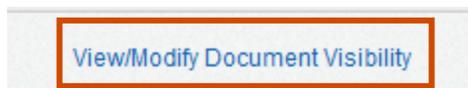
Note: This action is only available if one of the “**Sender Can Set ...**” Document Visibility options is selected for your account. If Document Visibility is enabled for your account but one of those options is not selected, Document Visibility is automatically used for any envelopes you send.



3. Click **Next** to go to the Add Tags page. Add DocuSign tags to the envelope normally.

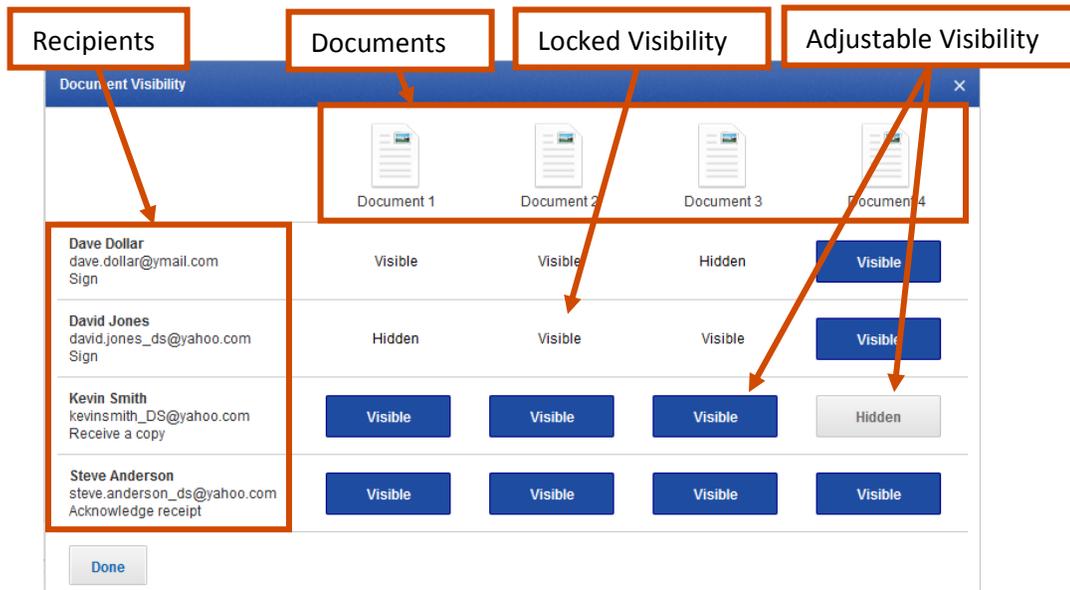
Note: If Document Visibility is enabled, all Signers must have a tag assigned. Free-Form signing is not allowed.

4. If Document Visibility is enabled for the envelope, click the **View/Modify Document Visibility** link at the bottom center of the web application to adjust recipient document visibility.



The Document Visibility grid shows the documents in the envelope across the top of the grid and the envelope recipients on the left side of the grid. The row for each recipient shows if the document is visible to the recipient or hidden from the recipient. If the listed visibility (Visible or Hidden) has a block around it, the visibility status can be changed by clicking on the status.

Note: If a Signer has a tag on a document, that document is always visible for that Signer and the document visibility is locked and cannot be changed. If there are tags on a document and none of the tags are associated with a Signer, that document is hidden for that Signer and the document visibility is locked and cannot be changed.



Example: in the figure above, Signer Dave Dollar has tags on Document 1 and 2, but not on Document 3. So, when signing, Dave Dollar will see Document 1 and 2, but not Document 3. Document 4 does not have any tags, so the visibility can be adjusted for all recipients.

Click **Done** to close the Document Visibility grid and save any visibility changes.

5. Complete sending the envelope normally.

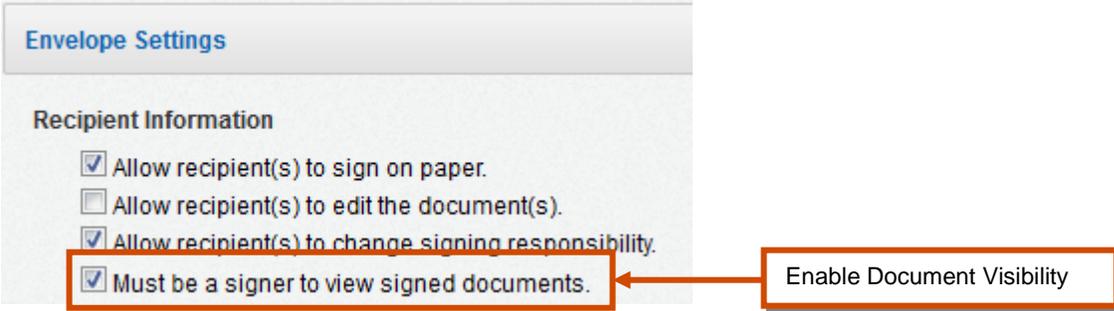
Your recipients receive email invitations normally. However, they will only be able to see documents that have tags assigned to them or that do not have any tags and are set to be visible.

Using Document Visibility in a Template

The process for using Document Visibility in a template is similar to the normal process for creating a template. The changes to the normal process are described in the following procedure.

1. Create a new template. Name the template and share as needed. Add documents, recipient roles, Email Subject and Email messages normally.
2. Optionally, in the Envelope Settings section, select **Must be a signer to view signed documents**, to enable Document Visibility for the template.

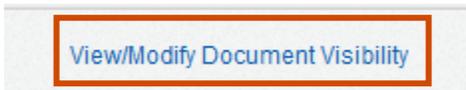
Note: This action is only available if one of the “**Sender Can Set ...**” Document Visibility options is selected for your account. If Document Visibility is enabled for your account but one of those options is not selected, Document Visibility is automatically used for any templates you create.



3. Click **Next** to go to the Add Tags page. Add DocuSign tags to the template normally.

Note: If Document Visibility is enabled, all Signers must have a tag assigned. Free-Form signing is not allowed.

4. If Document Visibility is enabled for the template, click the **View/Modify Document Visibility** link at the bottom center of the web application to adjust recipient document visibility.



The Document Visibility grid shows the documents in the template across the top of the grid and the recipient roles on the left side of the grid. The row for each recipient role shows if the document is visible to the role or hidden from the role. If the listed visibility (Visible or Hidden) has a block around it, the visibility status can be changed by clicking on the status.

Note: If a Signer has a tag on a document, that document is always visible for that Signer and the document visibility is locked and cannot be changed. If there are tags on a document and none of the tags are associated with a Signer, that document is hidden for that Signer and the document visibility is locked and cannot be changed.

Recipient Roles	Documents	Locked Visibility	Adjustable Visibility	
	Document 1	Document 2	Document 3	Document 4
Sign	Visible	Visible	Hidden	Visible
Sign	Hidden	Visible	Visible	Visible
Receive a copy	Visible	Visible	Visible	Hidden
Acknowledge receipt	Visible	Visible	Visible	Visible

Example: in the figure above, the first signer has tags on Document 1 and 2, but not on Document 3. So, when signing, that signer will see Document 1 and 2, but not Document 3. Document 4 does not have any tags, so the visibility can be adjusted for all recipients.

Click **Done** to close the Document Visibility grid and save any visibility changes.

5. Complete the template normally.

Using Check Boxes and Radio Buttons

When adding fields to a document, there might be times when you want to let your recipient select options on the document and you might not be sure if you should use check boxes or radio buttons for the options.

This section provides information on when to use check boxes and radio buttons in a document. It also provides procedures for adding check boxes and radio buttons, including how to group radio buttons, to a document.

When to use Check Boxes and Radio Buttons

Use the following guidelines to help determine when to use check boxes or radio buttons in a document:

- Use check boxes in situations where a recipient can select one or more options from a list of options. Check boxes can also be used in cases where you just need a simple way to have a recipient select a single option.
- Use radio buttons in situations where a recipient can only select one option from a list of options.

You can have both check boxes and radio buttons in the same document. Check boxes can be placed individually or in groups, while radio buttons should only be placed in groups.

Note: Depending on how your document is laid out, you might want to use a Drop Down tag instead of a group of radio buttons. See the [DocuSign Tag Information](#) section for more information about Drop Down tags and other tags.

Example: Check Box and Radio Button usage

In the following document, the recipient should only check one box in section C, while they can check all boxes that apply in section D.

The screenshot shows a document form with two sections highlighted by orange boxes and callouts:

- Section C:** "C. BUYER'S RIGHTS (check one box only):" This section contains two radio button options. An orange callout box points to this section with the text "Select only one".
- Section D:** "D. BUYER'S ACKNOWLEDGMENT (check applicable boxes):" This section contains two check box options. An orange callout box points to this section with the text "Select all that apply".

Other visible text in the form includes: "(b) Seller has no reports or records pertaining to lead-based paint and/or lead-based paint hazards on the Property", "E. BROKERS' ACKNOWLEDGMENT: Brokers have informed Seller of Seller's obligations under 42 U.S.C. 4852d to: (a) provide Buyer with a federally approved pamphlet on lead-based paint hazards; (b) complete this", and "money will be refunded to Buyer".

When using the form in DocuSign:

- For section C, add a group of two radio buttons, so that the recipient only selects one option.
- For section D, add two check boxes, so that the recipient can select one, two or no options.

Adding Check Boxes

Adding check boxes to a document is a normal part of sending documents for electronic signatures. Check boxes appear in documents as square boxes.

1. Create a new envelope. Add documents, recipients, Email Subject and Email messages, and select any Envelope Settings normally.
2. Start to add the tags normally.
3. Drag a Check Box tag to the document and drop it on the document.
4. Click on the **Properties** icon adjacent to the Check box tag to open the Properties dialog box for the tag.
5. Change the Label, add a Tool Tip or modify other properties for the Check Box.

Note: If there are multiple check boxes in the document that have the same Label, selecting or clearing one check box will automatically select or clear all the other check boxes with the same Label.

6. Click **Apply** to save the button information.

Note: You can save the Check Box tag as a custom tag by clicking **Save as Custom**.

7. Optionally, you can place a checkmark in the Check Box to be checked by clicking on the check box in the document.
8. Repeat steps 3 – 7 to add more check boxes.
9. Finish adding any other tags and send the envelope.

Adding and Grouping Radio Buttons

Adding radio buttons to a document is a normal part of sending documents for electronic signatures. Radio buttons, also referred to as option buttons, appear in documents as round buttons.

1. Create a new envelope. Add documents, recipients, Email Subject and Email messages, and select any Envelope Settings normally.
2. Start to add the tags normally.
3. Drag a Radio Button tag to the document and drop it on the document.
4. Click on the **Properties** icon adjacent to the Radio Button tag to open the Properties dialog box for the tag.

Radio Button Tag Properties

Recipient:

Allow All To Edit Require Initial

Group:

Value:

▶ Location

▶ Formatting Properties

▶ Conditional Fields

| |

Type the **Group** name

Type a **Value** for the selection

5. Type a name for the radio button **Group**. The Group name is used to join together multiple radio buttons in the same group. A recipient can only select one radio button in a group.
6. Add the **Value** for the Radio Button. This is the value that appears in the form data for the document if the radio button is selected.
7. Modify any other properties for the Radio Button tag.
8. Click **Apply** to save the button information.

Note: You can save the Radio button as a custom tag by clicking **Save as Custom**.

9. Drag another Radio Button tag to the document and drop it on the document.
10. Open the Properties window for the Radio Button.
Type the same **Group** name as the first radio button. Modify any other properties for the tag.
11. Click **Apply** to save the button information.
12. Repeat steps 9 – 11 to add any other buttons to the group.
13. Optionally, after adding all the buttons for a group, you can select one radio button for the group by clicking on the radio button. The recipient can still select a different option, unless the **Locked** form field option is selected.
14. Finish adding any other tags and send the envelope.

Using the Accessibility Support Feature

DocuSign is committed to providing our high quality solution in a manner that is accessible to all individuals, regardless of their abilities. To help meet this goal, DocuSign has incorporated an Accessibility Support feature.

The accessibility support feature permits screen reader applications to read instructions, envelope documents, and DocuSign tags. This allows blind and visually impaired signers to act on the tags and complete signing.

Note: The accessibility support feature is available to all DocuSign plans, but must be enabled for your account. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

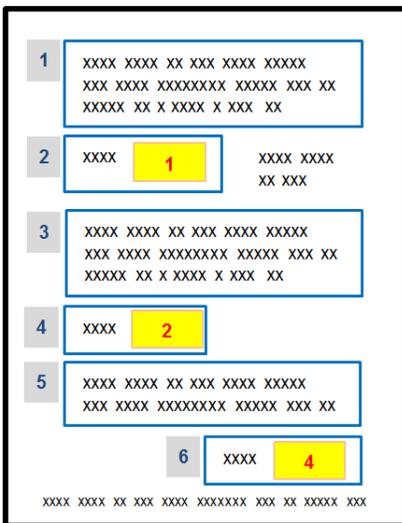
How it Works

DocuSign’s accessibility support feature allows your blind and vision impaired customers the flexibility of signing documents online. The feature works with screen readers to provide an audio version of the documents in an envelope and the DocuSign tags. The accessibility support feature has been tested with the NonVisual Desktop Access (NVDA[®]) open source screen reader, but should work with other screen readers.

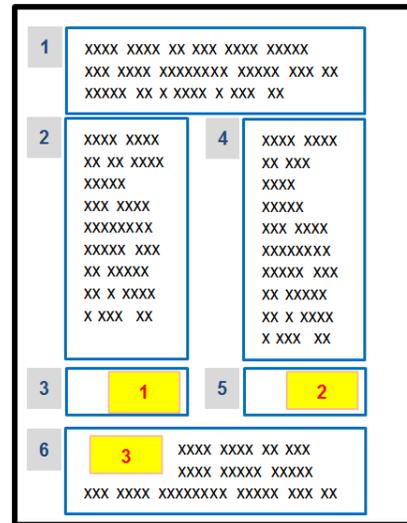
With the accessibility support feature, senders specify the order in which document text and DocuSign tags are read to the signer. The order of reading is set by creating numbered reading zones on envelope documents while adding tags in the DocuSign web application. The reading zone numbers set the order in which the document text and DocuSign tags are read. For the best signing experience, DocuSign recommends that you create separate reading zones for text and DocuSign tags and that each reading zone only has one DocuSign tag.

When the recipient opens the envelope and they have a screen reader installed, they are asked if they want the screen reader to read the documents and tags. The recipient can use the Tab key to move in order from one reading zone to the next. The text and tags in a reading zone are read to the signer. In cases where there is text in the same reading zone as a DocuSign tag, the text is read first (even when the text appears after the tag) and then the tag is read. There is an audio cue associated with tags that need the recipient to enter information, which uses the information entered in the DocuSign tag Label property. Text that is not included in a reading zone is never read.

Example: The diagrams below show two documents with reading zones and DocuSign tags added to the document. In the diagrams, the blue outlined areas represent reading zones, with the reading zone number adjacent to the zone, and the yellow boxes are DocuSign tags.



Example 1



Example 2

In Example 1, the reading order is reading zones 1 through 6 as the signer tags through the document. In reading zones 2, 4, and 6 the text in the reading zone is read and then the tag Label is read and a cue for the expected entry type is given. The text that is not included in reading zones, the text adjacent to reading zone 2 and at the bottom of the page, is not read.

In Example 2, the reading order is reading zones 1 through 6 as the signer tags through the document. In reading zones 3 and 5, only the DocuSign tag information is read. In reading zone 6, the text is read first and then the tag information is read.

Sending an Envelope with Accessibility

The process for sending an envelope with accessibility is similar to the standard procedure for sending documents for electronic signatures. The steps to set up the reading zones are shown in this procedure.

1. Create a new envelope. Add documents, recipients, Email Subject and Email messages, and then select any Envelope Settings. Click **Next** to add tags.
2. Select your recipients and add tags normally.

When editing tag Properties, the text entered in the Label field is what the screen reader application reads to describe the action needed for the tag. It is important that the label text is descriptive, so the recipient understands the action needed when the tag is read by the screen reader.

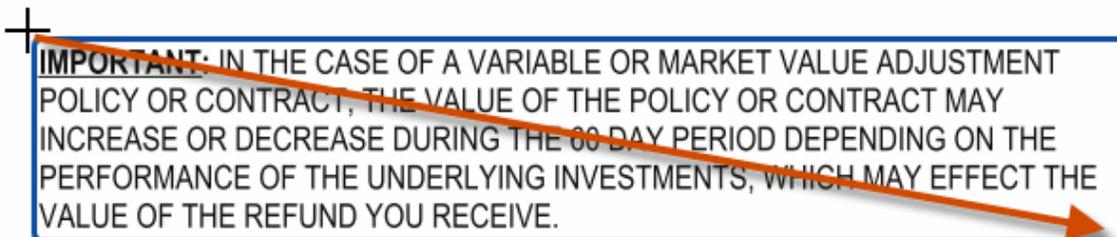
3. After adding tags, place the screen reader zones to the document. Screen reader zones are blocks of text and tags that will be read together by the recipient's screen reader.

Note: For the best signing experience, DocuSign recommends that you create separate reading zones for text and DocuSign tags and that each reading zone only contains one DocuSign tag.

In the Tagging Toolbar, click the Create Reading Zones button.



Place your cursor crosshair where you want to start the reading zone and then click and drag the cursor to place a box around the text or tag for this reading zone.



After placing the reading zone, a numbered box appears adjacent to the reading zone. The number is the order in which the screen reader will read the reading zones.



- You can change the order number for a reading zone by clicking on the Properties icon for the zone and typing a new number and press Enter.
- You can adjust the size of the reading zone by placing your cursor on the lower right edge of the zone until a double-headed arrow appears, click and drag your cursor to change the size of the zone.

- You can move the reading zone by placing your cursor over the reading zone until a four-headed arrow appears, click and drag the zone to place it in the correct location.
 - You can delete a reading zone by placing your cursor over the reading zone until a four-headed arrow appears, click and then drag it off the screen.
4. Repeat step 3 to add more reading zones to the document.
 5. Complete sending the envelope normally.

Note: The Preview function does not allow for use of a screen reader to check the reading zones.

Creating a Template with Accessibility

The process for creating a template with accessibility is similar to the normal procedure for creating a template. The steps are shown in this procedure.

1. Create a new template; add the Template Summary information and documents.
2. Add the Recipient Role information, the Email Subject, Email messages and select any Envelope Settings normally. Click **Next** to add tags.
3. Select your recipients and add tags normally.

When editing tag Properties, the text entered in the Label field is what the screen reader application reads to describe the action needed for the tag. It is important that the label text is descriptive, so the recipient understands the needed action when tag is read by the screen reader.

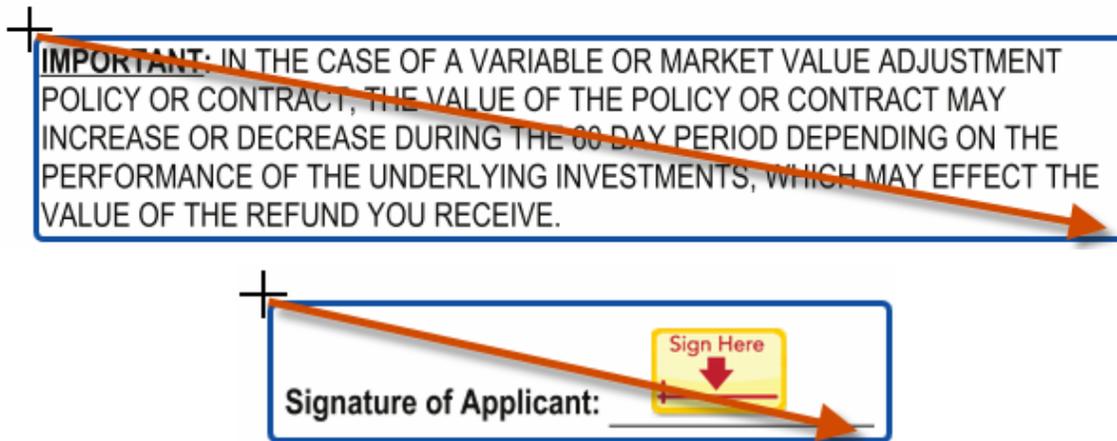
4. After adding tags, place the screen reader zones to the document. Screen reader zones are blocks of text and tags that will be read together by the recipient's screen reader.

Note: For the best signing experience, DocuSign recommends that you create separate reading zones for text and DocuSign tags and that each reading zone only contains one DocuSign tag.

In the Tagging Toolbar, click the Create Reading Zones button.



Place your cursor crosshair where you want to start the reading zone and then click and drag the cursor to place a box around the text and tags for this reading zone.



After placing the reading zone, a numbered box appears adjacent to the reading zone. The number is the order in which the screen reader will read the reading zones.



- You can change the order number for a reading zone by clicking on the Properties icon for the zone and typing a new number and press ENTER.
 - You can adjust the size of the reading zone by placing your cursor on the lower right edge of the zone until a double-headed arrow appears, click and drag your cursor to change the size of the zone.
 - You can move the reading zone by placing your cursor over the reading zone until a four-headed arrow appears, click and drag the zone to place it in the correct location.
 - You can delete a reading zone by placing your cursor over the reading zone until a four-headed arrow appears, click and then drag it off the screen.
5. Repeat step 4 to add more reading zones to the document.
 6. Complete and save the template.

Exporting Reading Zone Information

Exporting reading zone information allows you to use the accessibility support feature when sending through the API (this feature is supported in both the DocuSign SOAP and REST APIs). The reading zone information can be exported from a template. When sending through the API, you must use the same documents, recipients and tags as the original template.

1. Open the template from which you want to export the reading zones.
2. Click **Next** to go to the tagging page.
3. In the Tagging Toolbar, click the Export Reading Zones button.



The Reading Zone Data dialog box is displayed.



Copy and save the encoded information in the Reading Zone Data dialog box. This information is what is used when sending from the API.

4. Optional: Because the document, recipient and tag information for the envelope sent through the API must match the information original template, DocuSign recommends that you export the template information and use that information in the API.

To export the template information:

- From the Classic DocuSign Experience Manage tab, find template with the exported reading zones.
 - Select the template and in the Actions menu select **Download Template(s)**. The template information is saved as an XML file.
5. When sending through the API, add the saved encoded string to the accessibility node in the envelope.

For the REST API the accessibility node is in the POST /accounts/{accountId}/envelopes

For the SOAP API the accessibility node is in the Envelope section for CreateAndSendEnvelope and CreateEnvelope and in the Envelope Information section for CreateEnvelopeFromTemplate and CreateEnvelopeFromTemplatesAndForms.

Advanced Sending Option

The Advanced Sending option shifts your Classic DocuSign Experience to use the one-page sending view for new envelopes instead of the standard envelope sending process. The one-page sending view uses the Add Tags page to add documents, recipients, messages, email settings, and tags to an envelope.

Enabling Advanced Sending

The Advanced Sending option is enabled from the **Send** tab in the Classic DocuSign Experience. Users can enable Advanced Sending or return to standard sending on their own.

- To enable the Advanced Sending option for your web application:

Click the **Send** tab and, at the bottom of the web application, select **Use Advanced Sending**.

Use Advanced Sending

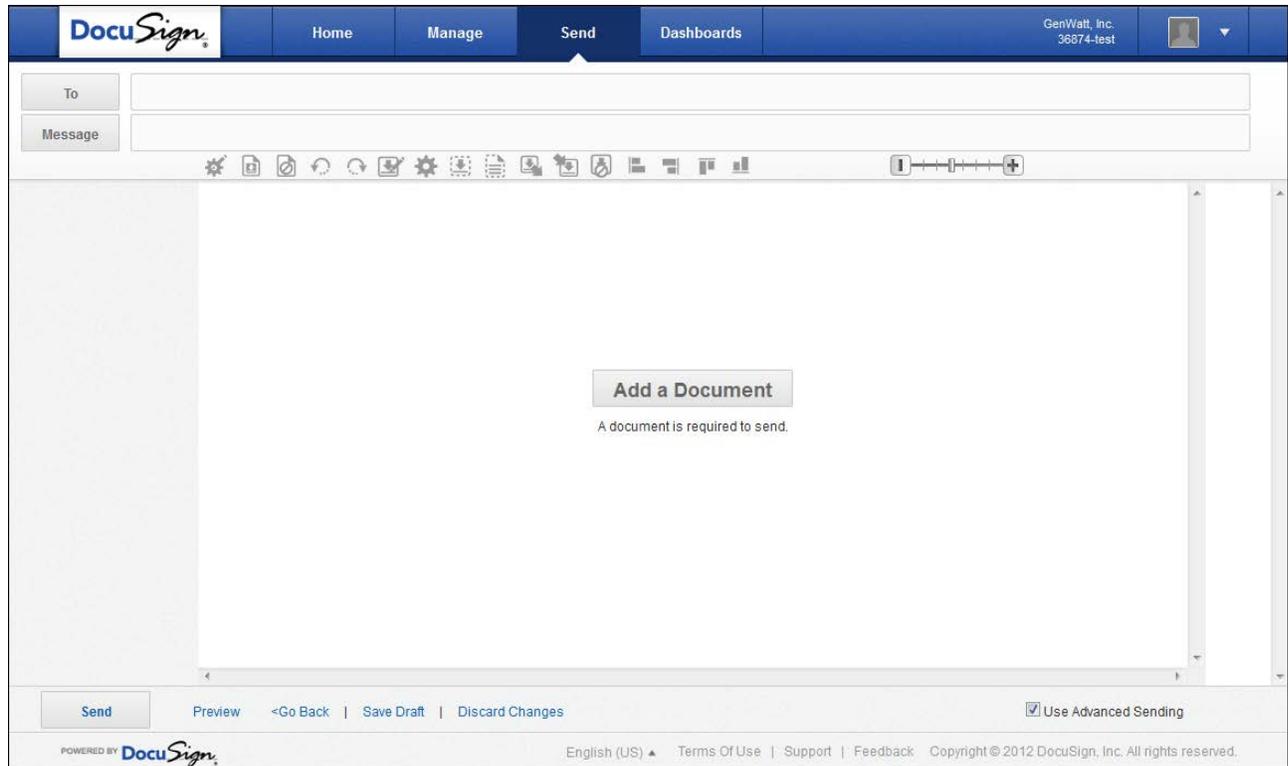
The Advanced Sending option is enabled. The next time you send an envelope you are taken to the Advanced Sending page.

You can return to the standard sending pages by clearing **Use Advanced Sending**.

Using the Advanced Sending Page

The Advanced Sending page uses the Add Tags page to add documents, recipients, messages, email settings, and tags to an envelope. Sending from this page is similar to the standard sending an envelope process. The differences are explained below.

1. Click the **Send** navigation tab. The Advanced Sending page is displayed.



2. Click **Add a Document**. The Documents for Signature dialog box is displayed. 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.

After adding the first document, you can add more documents in the same manner. When you have finished adding documents, click **Done**.

To add more documents or edit the current documents, click **Edit** above the document map on the right side of the page.

3. Click the **To** button below the Navigation tabs to add recipients. The Recipients and Routing dialog box is displayed.

- 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.

Sending to recipients with the same Email address: You can send an envelope to people that share an email address by adding the first person normally. Then add the second person by typing the same email address in the Email field, typing the second person's name in the Name field and then clicking **Add Signer**. The system adds the second recipient to the list.

Sending a Bulk Recipient file: If your account is enabled to send bulk recipient files, you can upload a file with multiple recipients. See [Using the Bulk Recipient Feature](#) for more information.

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.

Adding recipients for a template: If you are sending an envelope from a template, there are placeholders for the recipients already added to the envelope. Replace the placeholder recipient Email and Name information with the Email and Name of your 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.

- Set the recipient Action and Identify option for the recipient.
- Add other recipients as needed. When you have finished adding recipients, click **Done**.

To add more recipients or edit the current recipients, click the **To** button.

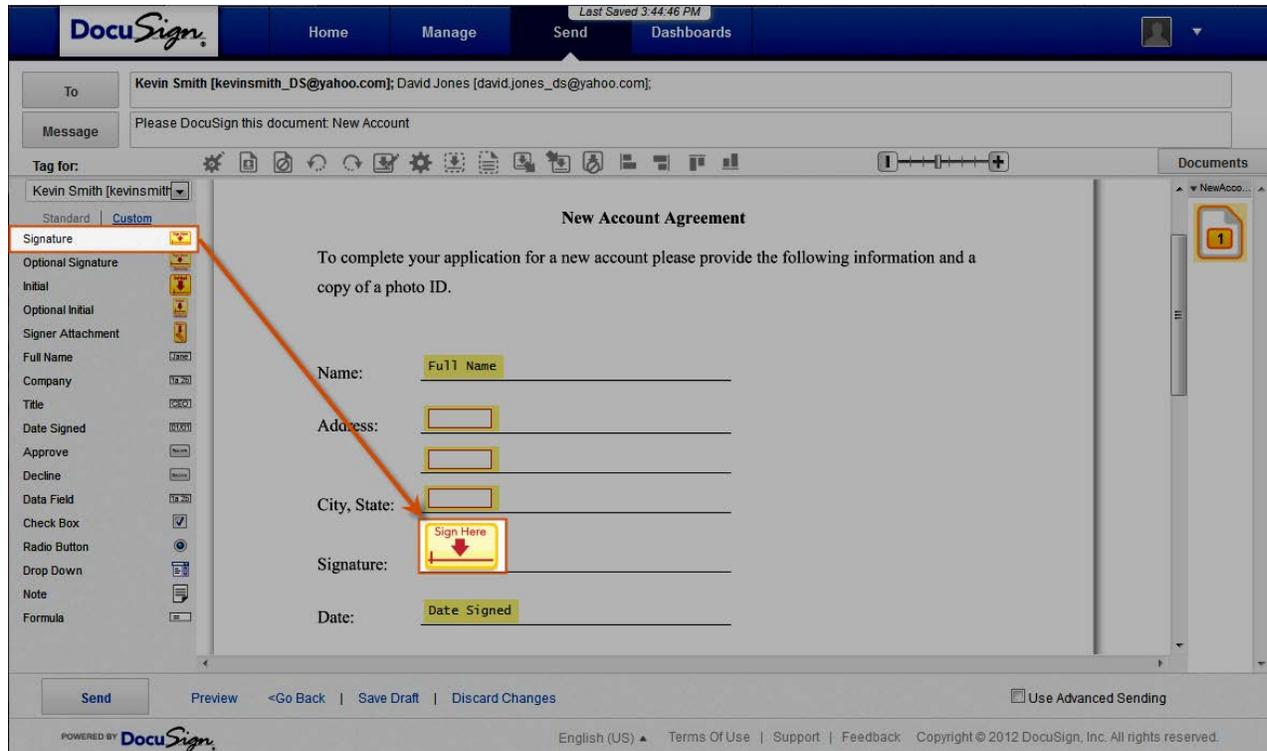
4. Click the **Message** button below the recipient line to edit the email subject and message for the recipients. The Email Message dialog box is displayed.

Modify the **Email Subject**, **Email Message**, and add a **Note** for individual recipients as needed.

Click **Done** when you have completed editing the message information. Click the **Message** button to modify the message information.

5. Add tags to the document for the recipients. Click the recipient's name on the **To** line or select the recipient name in the **Tag for:** list.

Click and drag a tag from the palette and drop it on the document. See the [DocuSign Tag Information](#) section for more information about tags and tag properties.



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 web application.

Use the Tagging Toolbar to edit your envelope settings, documents and tags. The Tagging Toolbar is on the upper-portion of the page, below the message field. See [Working with the Tagging Toolbar](#) for more information about the toolbar.

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.

Managing Envelopes and Folders

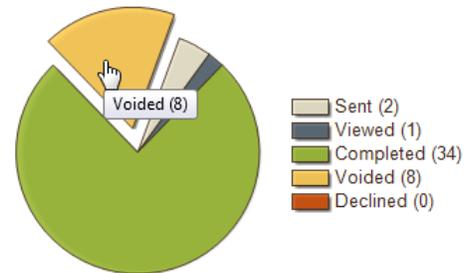
An important feature of DocuSign is the ability to easily manage your envelopes and folders from the Classic DocuSign Experience. This section provides an overview of how to search for an envelope, view envelope status, view envelope history, collect form data for documents with concealed fields, correct information in an envelope, clone an envelope for sending as a new envelope and move envelopes to different folders. It also explains how to add and delete folders.

Searching for Envelopes

Several methods can be used to search for a particular envelope. When looking for an envelope, you can:

- With the **Manage** navigation tab selected, you can select a folder in the **Envelopes** section of the navigation panel and sort the envelope list by clicking the header for a column.
- With the **Manage** navigation tab selected, you can select a folder in the **Search Folders** section of the navigation panel to filter the envelope search and then sort the envelope list by clicking the header for a column. The **Most Recent** folder in this section has envelopes from your most recent search.
- With the **Dashboards** navigation tab selected, you can select an option in the navigation panel to filter the envelope list. You can also click on a graphical element to filter envelopes by that element.

Example: In the figure to the right, the user has clicked on the Voided portion of the Envelope Status graphic to filter the search to find envelopes with a Voided status.



- Changing the **Current Filter** date: The Current Filter defaults to searching in the last 180 days. You can change the filter search criteria using the search bar. Click on the Current Filter information or in the *Search Envelope* field to expand the search criteria. For search criteria you can type a particular search term, select the text searched on (Subject, Recipients, Sender Name and Envelope Fields), select the folder (This Folder, All My Envelopes, or Dashboards), select the envelope status (All Statuses, Completed, Declined, In Process, Voided, and Authentication Failed), search your envelopes or a date range.

Note: The “Envelope Fields” filter lets you search for envelopes with particular Envelope Custom Field information by selecting **Envelope Fields** and typing the search term for the Envelope Custom Field in the search criteria (note that this is not searching for a custom tag or other tags in envelopes).

The Envelope Custom Fields are created by customer administrators and the information that can be used in a search is added, or selected, by senders in the Envelope Settings section.

Example: The Customer Administrator creates an Envelope Custom Field called “Sales Region” where a sender will add their sales region information when sending an envelope. A sender in the North Sales Region is preparing an envelope, they scroll to the Envelope Settings section and under the Custom Fields heading type “North” in the Sales Region custom field, and then finish and send the envelope.

(Note continued) When searching for an envelope from the North Sales Region, the Current Filter can be changed by selecting “Envelope Fields” and typing “North” in the search criteria. The search shows all the envelopes with “North” in the Custom Envelope Field.

After adding the search criteria, click **Search**.

Note: Clicking on the calendar icon adjacent to the From and To date range fields opens a calendar selection tool to assist with entering dates.

Viewing Envelope Status and Details

1. Find and select the envelope you want to view the details for using one of the methods described in [Searching for Envelopes](#).
2. Click the Summary tab in the detail panel.

This tab shows the envelope status at the top of the panel. It also shows the detail of when the envelope was sent or created and provides a quick view of the envelope progress by showing the status of envelope recipients.

There are four categories of envelope status:

- In Process: The envelope has been sent and is waiting for one or more recipients to complete their actions.

Note: If a recipient fails an authentication check, the **Manage** tab result panel shows the envelope status as “Authentication Failed.” When the envelope is selected, the **Summary** tab still shows the envelope status as “In Process” and a short description of the authentication failure (Failed Access Code, Failed ID Check, or Failed Phone Authentication) is shown adjacent to the recipient. This information is also recorded in the envelope history.

If there is an undeliverable email notification for an envelope invitation, the recipient status in the **Summary** tab is changed to “Auto Responded” and raw SMTP string text for the response is shown adjacent to the recipient.

- **Completed:** All recipients have completed the actions for the envelope.
- **Voided:** The sender of the envelope has cancelled an envelope.
- **Declined:** A signer has declined to sign/complete the envelope.

Viewing Envelope History

1. Find and select the envelope you want to view the history of using one of the methods described in [Searching for Envelopes](#).
2. Click **Actions** and then select **History**. The envelope history is opened in a new browser window. The browser shows the Envelope Data, Record Tracking information and the actions taken by the users.
 - Click **Printable Version** to see a version formatted for printing.
 - Click **Certificate** to see and print the envelope certificate information.
 - After you are done viewing the history, click **Close** to close the browser window.

Opening an Envelope

When you open an envelope you can view the documents in the envelope, any pre-filled tags (such as Full Name tags) and the information that has been added by recipients. You can also print and download the envelope documents using the buttons at the top of the page. Additionally, the **More** options menu can be used to view the envelope history, view the certificate, clone the envelope, and close the envelope.

1. Find and select the envelope using one of the methods described in [Searching for Envelopes](#).
2. Click **Actions** and then select **Open**. The envelope opens for viewing. You have the following options available: (most of these options can also be selected from the **Actions** menu without opening the envelope)
 - **Clone:** This opens the envelope so it can be sent as a new envelope with all the same documents, recipients and tags. Information in the cloned envelope can be changed before it is sent. See [Cloning an Envelope](#) for more information.
 - **Correct:** (only available on In Process envelopes) This allows you to correct information in the envelope. You can correct the information in a sent envelope that has In Process status. See [Correcting an Envelope](#) for more information.
 - **Delete:** This moves the envelope to the Deleted folder. If you accidentally deleted an envelope, you can go to this folder to restore the envelope. Envelopes in this folder are removed from the folder during overnight processing.
 - **Form Data:** (only available for Completed envelopes) This opens a window that shows the form data for the envelope. The information can be downloaded as an XML or CSV file.
 - **Forward:** (only available from the **Actions** menu on Completed envelopes) This opens a new envelope with the completed documents as the documents in the envelope. Unlike a cloned envelope, the data in the envelope documents cannot be changed.
 - **History:** This opens the envelope history in a new browser window.
 - **Certificate:** This opens the envelope certificate of completion in a new browser window.
 - **Export as CSV:** This allows you to export the information for the selected envelope(s) as a CSV file.

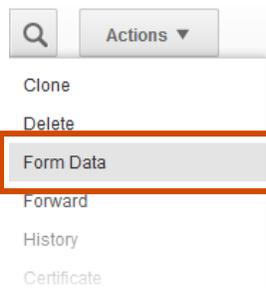
- **Resend:** (only available for In Process envelopes) This sends the envelope again without any changes to the envelope. See [Resending an Envelope](#) for more information.
 - **Void:** (only available for In Process envelopes) This cancels the envelope. You will be asked to provide a reason for voiding the envelope. See [Voiding an Envelope](#) for more information.
3. Click the close icon () or select **Close Envelope** from the **More** menu to close the envelope.

Collecting Envelope Form Data

This section explains how to view and download information from information fields, including concealed fields, in a document. The information can be downloaded as an XML or CSV file.

Note: If your account has the data change view option enabled, there is an additional column in the data showing the original values of a tag. See the [Viewing Changes to Envelope Data](#) for more information about this.

1. Find and select the envelope with the form data (this can include concealed fields) you want to collect using one of the methods described in [Searching for Envelopes](#).
2. Click **Actions** and then select **Form Data**.



A new browser window opens showing the envelope form data, including the concealed field label and the value entered by the recipient.

To download the field information, click **Download XML** or **Download CSV** to download the information as an XML or CSV file. The file includes the Envelope ID, Recipient Name, Recipient Email, the timestamp when the recipient signed the document, the field label and the value entered in the concealed field.

Click **Close** to close the browser window.

Viewing Changes to Envelope Data

The data change view option provides a way to see which information was changed during envelope signing. When enabled, this option can highlight changed information when viewing documents in an envelope and when downloading or printing a PDF version of the envelope documents. Additionally, when viewing Form Data, a new column is added to the data report that shows the original value of information in the tags. If downloading the file, the column with the original value information is not included.

Note: This option is included in DocuSign Business, Business Premium, Enterprise, System Automated (SA), DocuSign for REALTORS, and DocuSign for Real Estate plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

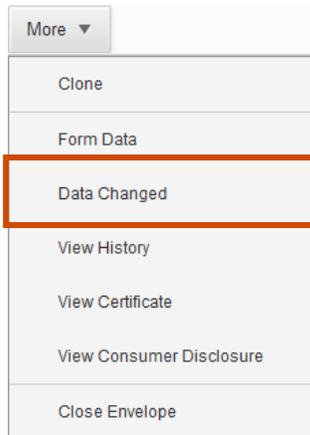
The highlighted, or original information for Form Data, is available for the following tag types:

Optional Signature	Optional Initials	Full Name	First Name	Last Name
Email Address	Title	Company	Date Signed	Data Field
Check Box	Radio Button	Drop Down	Formula	

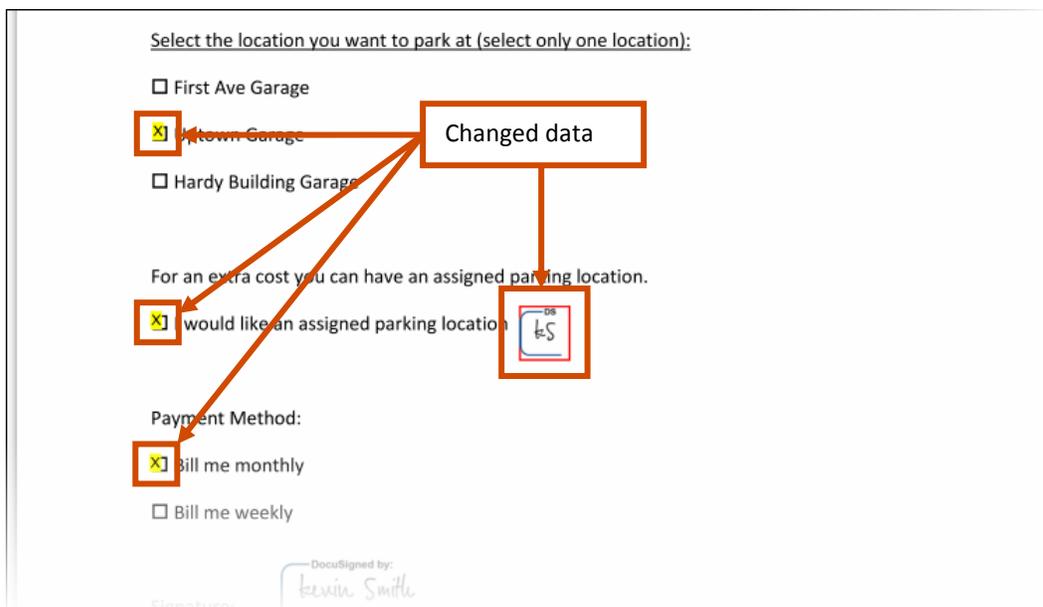
Viewing and Downloading Highlighted Data Changes

1. Find and select the envelope you want to open using one of the methods described in [Searching for Envelopes](#).

2. Click **Actions** and then select **Open**. The envelope opens for viewing.
Click the **More** menu and select **Data Changed**.



The information that changed is highlighted in yellow, while optional signatures or initials that are filled in are outlined in red. If you download or print the PDF of the documents, the changes are shown.



Viewing and Downloading Form Data Changes

1. Find and select the envelope with the form data (this can include concealed fields) you want to collect using one of the methods described in [Searching for Envelopes](#).
2. Click **Actions** and then select **Form Data**.

Note: You can also get the envelope form data by opening the envelope, clicking the **More Options** menu and then selecting **Form Data**.

A new browser window opens showing the envelope form data, including the concealed field label and the value entered by the recipient. The form data is presented in two columns, one that shows the Original Value of information in the tags and one that shows the final Value of the information.

Envelope Form Data		
Field	Original Value	Value
Widgets	0	2
Boxes	5	3
Crates	2	2
Containers	0	1

To download the field information, click **Download XML** or **Download CSV** to download the information as an XML or CSV file. When downloading the file, the column with the original value information is not included. The file includes the Envelope ID, Recipient Name, Recipient Email, the timestamp when the recipient signed the document, the field label, and the value entered by recipients.

Click **Close** to close the browser window.

Voiding an Envelope

This action cancels the envelope and marks it as voided. Once an envelope is voided, recipients can no longer view or sign the envelope. When the envelope is voided, all recipients are sent an email informing them that the envelope was voided and providing the reason it was voided.

Note: Only envelope with In Process status can be voided.

1. Find and select the envelope you want to cancel using one of the methods described in [Searching for Envelopes](#).
2. Click **Actions** and then select **Void**.

The void envelope page appears.

Are you sure you want to void this envelope?

Voiding an envelope will remove access to the envelope for your recipients. Once voided, they will no longer be able to view or sign it.

To void this envelope, please provide a reason for voiding below, and press 'Void Envelope'. An email will be sent to recipients who have already signed, informing them this envelope has been voided along with your comments.

Status	Envelope ID	Subject
Will be voided:	B136657D-5F1A-4C5E-B597-716EC62D16B2	Please DocuSign this document: NewAccount.pdf

characters remaining 200

- Type the reason for voiding the envelope. This information will be included in the email sent to recipients that have already signed the envelope.

- Click **Void Envelope**. You are returned to the Manage tab and the envelope status is changed to Voided.

Resending an Envelope

There might be times when you need to resend an In Process envelope to a recipient (for example the recipient deleted an email without accessing the envelope). This action lets you send the envelope without having create a new one, it does not allow you to change any envelope information. For information on changing envelope information, see [Correcting an Envelope](#).

Note: The Resend option is only available for envelopes with In Process status.

1. Find and select the envelope you want to resend using one of the methods described in [Searching for Envelopes](#).
2. Click **Actions** and then select **Resend**.
A message dialog box is shown explaining that the system will resend the envelope to recipients in the next state without any changes to the envelope.
3. Click **OK** to resend the envelope.

Correcting an Envelope

You can correct the information in a sent envelope that has In Process status. This can be helpful if an envelope was sent to the wrong email address or routing order was used in the original envelope.

Note: Changes are only allowed for recipients who have not yet completed their assigned envelope task. A new email is sent to a recipient whose name or email address is changed. An email is also sent to the original recipient informing them of the change.

1. Find and select the envelope you want to correct using one of the methods described in [Searching for Envelopes](#).
2. Click **Actions** and then select **Correct**.
The envelope is opened in the standard Prepare Envelope page so that you can make changes to the envelope. In the Prepare Envelope page heading the system displays **Correcting Envelope** to show that you are correcting an envelope.

Note: If your account uses Simple Correct you can only make changes to: routing order, recipient names, email addresses, authentication information and resend the envelope; you cannot change or add documents or work with tags on the documents. You can only make changes to documents and tags if the Advanced Correct option is enabled for your account. Check with your DocuSign administrator to learn if Advanced Correct is enabled.



3. Follow the same actions you would take for completing and sending the envelope.
If the envelope needs to be resent to a recipient, select the **Resend** checkbox.

Order	Delivery	Email / Fax	Name	Action	Identify	Re-Send
1	Email	kevinsmith_DS@yahoo.c	Kevin Smith	Sign	Email, ID	

When all corrections and changes are completed, click **Correct** to complete correcting and resend (if selected) the envelope. You are then returned to the Manage tab.

Cloning an Envelope

Cloning an envelope opens an envelope so it can be sent as a new envelope with all the same documents, recipients and tags. Information in the cloned envelope can be changed before it is sent.

1. Find and select the envelope you want to correct using one of the methods described in [Searching for Envelopes](#).
2. Click **Actions** and then select **Clone**.

The envelope is opened in the **Send** navigation tab so that you can make changes to the envelope. Follow the same actions you would take for completing and sending the envelope.

Moving Envelopes between Folders

You can move envelopes into other folders in the **Envelopes** section in the navigation panel.

Note: You cannot move envelopes into or out of the **Draft** folder.

1. Find and select the envelope you want to correct using one of the methods described in [Searching for Envelopes](#).
2. Click and drag the envelope to the new folder. The envelope is moved to the new folder.
3. Repeat this until you have moved all the envelopes you want to move.

Adding a Folder

You can customize your folder layout by adding new folders to your current folder structure. You can add new folders to the **Envelopes** and **Templates** sections in the navigation panel.

You can add a folder at the same level as the main folders or under the main folders in the **Envelopes** section, except for the Draft folder. You can also add a folder under the **Templates** folder.

- To add a folder on the same level as the main folders in the Envelopes section, select the Draft folder and click **+Add Folder**.

A folder, named **New Folder**, appears at the bottom of the list. Double-click on the **New Folder** and type the name of the folder.

- To add a folder under an **Envelopes** section main folder or the **Templates** folder, click on the folder you want to add the new folder below and then click **+Add Folder**.

A folder, named **New Folder**, appears below the selected folder. Double-click on the **New Folder** and type the name of the folder.

Deleting a Folder

You can delete the folders that you have created in your web application.

Important: You cannot delete the default folders and all items must be removed from a folder before it can be deleted.

- To delete a folder, move your cursor over the folder and click the delete icon (), the folder is

removed from the list.

Signing Documents with DocuSign

Senders have an array of options about how signers sign electronically in DocuSign. New signers will also have a slightly different experience than returning signers and signers with a DocuSign account.

This section provides information about the signing experience and how different options appear to signers of your electronic envelopes. You and your signers can find step-by-step guides for electronically signing documents, using the Sign on Paper feature, and for providing documents to the sender.

Note: If your account is using the DocuSign Winter '15 signing experience, also known as the new signing experience, refer to the new signing experience topics for signing information. If you are not using the new signing experience, refer to the previous signing experience topics. If you aren't sure if you are using the new signing experience, check with your DocuSign administrator or look at the signing images and help topics to ensure you are referring to the correct help topic.

Basic Signing

A signer's first experience with DocuSign is an email notifying them of documents needing their signature or review.

Note: The email can be branded with the corporate name and colors of the sender.

Email Notification

The email is sent from DocuSign on behalf of the sender. The email contains a message from the sender and a link to open the document on DocuSign. The signer clicks **Review Documents** to start the signing process.

Note: The email shown depends on which signing experience your account is using the email on the left is the new signing experience and the email on the right is the previous signing experience.

The image displays two side-by-side screenshots of DocuSign email notifications. The left screenshot, representing the new signing experience, features a blue header with the DocuSign logo and a central blue box containing a document icon and the text 'Steve Anderson sent you a document to review and sign.' Below this is a prominent yellow 'REVIEW DOCUMENT' button. A private message section follows, showing a message from Steve Anderson to Bob. The right screenshot, representing the previous signing experience, has a blue header with the DocuSign logo and the text 'Please review and sign your document'. It includes sender information for Steve Anderson (GenWalt, Inc.), a greeting to Kevin Smith, and a yellow 'Review Documents' button. Below the button is an 'ALTERNATELY' section with a document code: 6AED384087CE4767AF5C50E6DEF2A2E3. A footer section provides contact information for technical assistance.

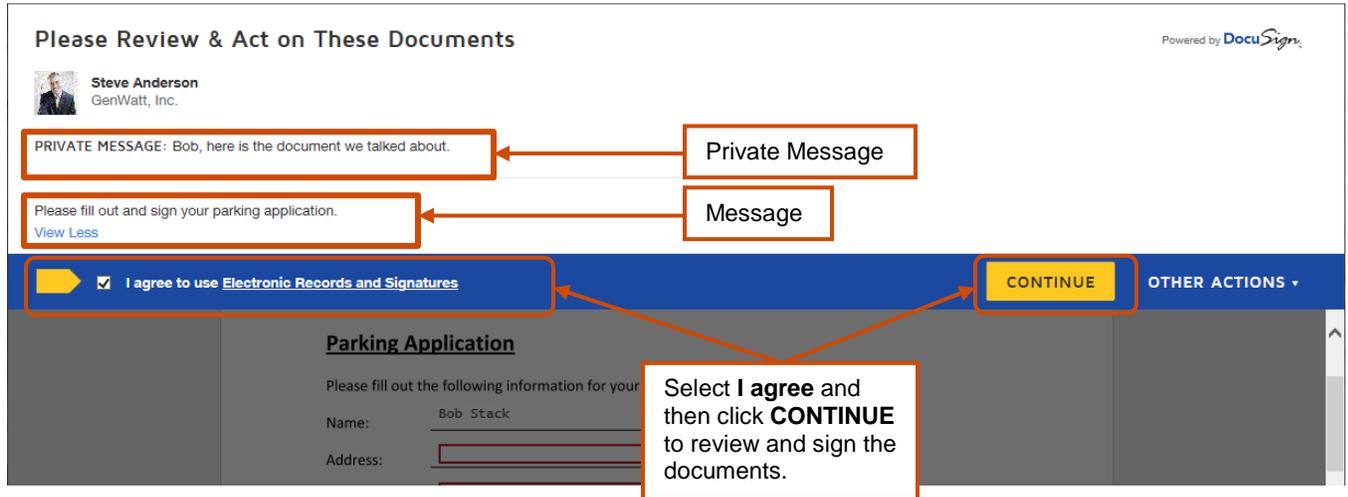
Alternately, the signer can access the documents by going to the DocuSign website, click the **Access Document** link and entering the document code from the email.

Signing Welcome

The signing welcome pages for the [new](#) and [previous](#) signing experiences are outlined below.

New Signing Experience

The welcome page provides information about the sender and documents in the envelope, and has access to the sender's electronic record and signature consent disclosure, which covers conducting business electronically with the sender.



The signer can review the disclosure and select the check box for agreeing to use Electronic Records and Signatures, and then click **CONTINUE** to hide the welcome begin reviewing and signing the documents.

Important! The signer must agree to use electronic records and signatures in order to view and sign the documents.

Optionally, the signer can use the **OTHER ACTIONS** menu at the right of the browser to select a different option for the documents, such as finishing later or declining to sign. The available options depend on sender settings; see the [Other Actions section](#) for more information about these options.

Previous Signing Experience

The welcome page provides information about the sender and documents in your envelope, and has access to the sender's electronic record and signature consent disclosure, which covers conducting business electronically with the sender.

The signer will review the disclosure and select the checkbox for consenting to use Electronic Records and Signatures, and then clicks **Review Documents** to continue.

Important! The signer must consent to use electronic records and signatures in order to view and sign the documents.

Request for Signature

From:  **Steve Anderson**
GenWatt, Inc.

Documents (1): Parking Application.pdf

From time to time, GenWatt, Inc. (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign, Inc. (DocuSign) electronic signing system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.

[Read Electronic Record and Signature Disclosure](#)

I consent to use Electronic Records and Signatures

Review Document Decline Finish Later Sign on Paper Change Signer

Select I consent and then click Review Documents to continue.

The other options available to the signer are:

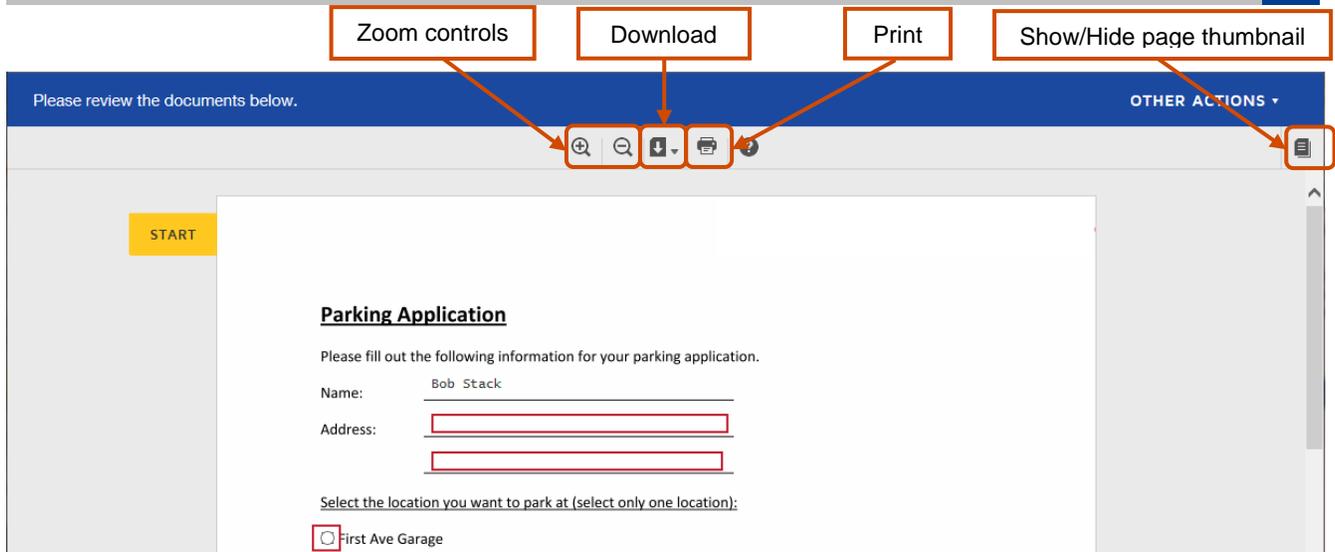
- Click **Finish Later** if you are not ready to sign the document. You can return to the document later by using the link in the email notification.
- Click **Sign on Paper** to sign the document on paper. See the *Signing with the Sign on Paper Feature* guide on the DocuSign website for more information about using this option. In some cases this option might not be available.
- Click **Change Signer** to send this document to another person to sign. You will be asked to provide the new signer's name and email address. A message is sent to the person that sent the document telling them you have reassigned the document.
- Click **Decline** to decline signing the document. You are asked to provide a message for the person that sent the document telling them why you have declined to sign.

Signing Process

The signing processes for the [new](#) and [previous](#) signing experiences are outlined below.

New Signing Experience

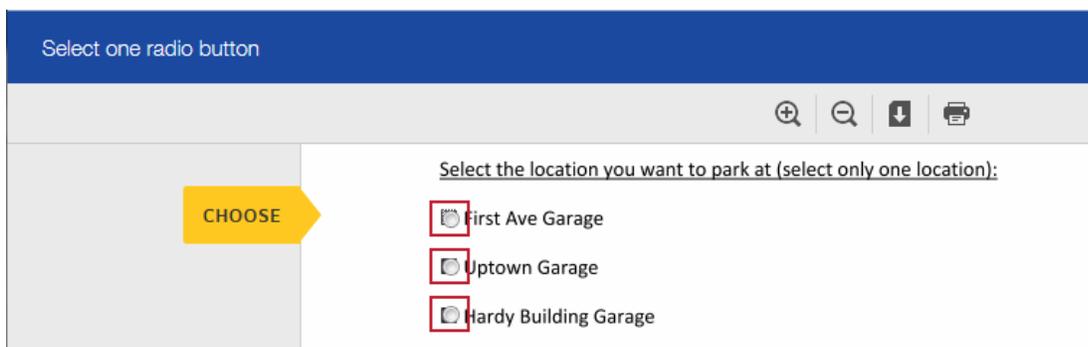
The first page of the document for signing is shown in the browser window. There are several controls available for the signer.



- In the center there are controls for zooming in or out on the current page, downloading all the pages as a PDF file, and printing the pages.
- The right side of the window has a show/hide page thumbnail option to show and hide a document map that shows the number of pages. You can click on a page to jump to a page.

Click **START** on the left side of the page to begin the signing process.

The action indicator on the left side of the page moves through the document, showing where information needs to be added, while a cue in the upper-left of the browser provides more information about the action you are expected to take for the current field. You can also place your cursor over a field to see any tips the sender has provided.



Fields that are outlined in red are required and must be filled out to complete the signing process.

Note: Some fields, such as signing date fields, are automatically filled in based on information available to the system. You cannot change or modify this information.

- To select a radio button or check box, click on the appropriate radio button or check box. Note that you can only select one radio button in a group.
- To select an option from a drop-down list, click on the list and select the appropriate option.
- To add other information in a boxed field, type the requested information into the field and click **NEXT** or press the Tab key to continue.
- To sign or initial, click the **SIGN** or **INITIAL** field on the document.

Adopting your signature: The first time you click a **SIGN** or **INITIAL** field, you are asked to adopt your signature and initials.

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name
Bob Stack

Initials
BS

Select Style Draw

Preview

DocuSigned by:
Bob Stack
1359F1658659478...

DS
BS Change Style

By clicking Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

To adopt your signature:

- First verify your name and initials are correct. If not, they can change them as needed. If you would like to change your name or initials, type the changes in the **Full Name** and **Initials** fields.
- Choose if you want to select a preformatted signature style or if you will draw your signature.

Note: Drawing a signature and initials can only be done if your browser is HTML5 capable and the device allows it.

If you choose to use a preformatted style, you can click **Select Style** to view and select a signature style. Just click on a style to select it.

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name
Bob Stack

Select Style Draw

Preview

DocuSigned by:
Bob Stack
1359F1658659478...

By clicking Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

DocuSigned by:
Bob Stack
1359F1658659478... DS
BS

If you choose to draw your signature, click **Draw** to show the blocks for adding your signature or initials. In the **Draw your signature** or **Draw your Initials** block, draw your signature/initials using a mouse or, for a touch-screens, your finger or a stylus. If you make a mistake, click **Clear** to reset the block.

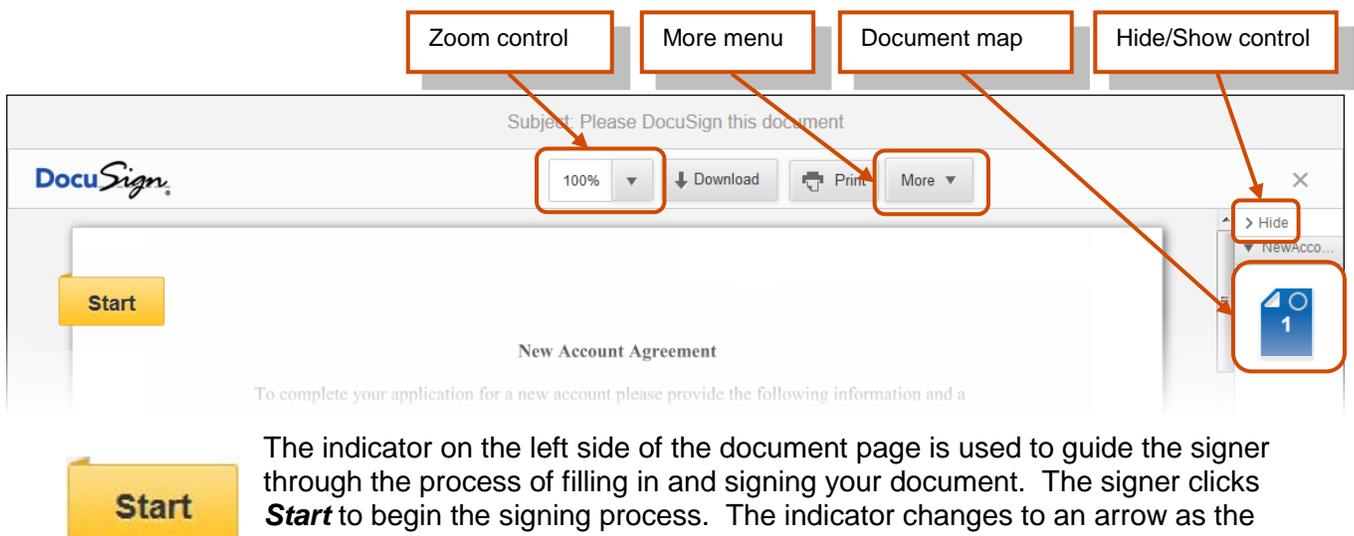
Note: You can return to the preformatted signature styles by clicking **Select Style**.

- Finally click **ADOPT AND SIGN** to adopt and save your signature information and return to the document.

Previous Signing Experience

The first page of the document for the signer is shown in the window.

- The right side of the window has a document map showing the number of pages in the envelope and the pages that have tags. The signer can click on a page to jump to a page. They can hide or show the document map by click the Hide/Show control.
- There is also a control for zooming in or out on the current page. The signer can select the page size from the list.
- In the center of the header the signer can download the document as a PDF file, print the document, and access the **More** menu. From the **More** menu, the signer can view information about the envelope, or select to change the signer, decline to sign, print and sign on paper and fax, or finish signing later. See the [More Options](#) section of this guide for more information about the options presented.



The indicator on the left side of the document page is used to guide the signer through the process of filling in and signing your document. The signer clicks **Start** to begin the signing process. The indicator changes to an arrow as the

signer is taken to the first tag to fill out.

The text shown in the indicator arrow is the action the signer is expected to take for the current information tag. The text in the arrow changes as the indicator guides the signer through the document. The images below are examples of possible indicator arrows and with the expected actions:

	<p>Select an item from a drop down list, a checkbox, or option button.</p>		<p>Type information into the data field. Click Next (see below) or press the Tab key to go to the next information field.</p>
	<p>Click the Sign Here or Initial tag to place a signature or initials in the document. If this is the first signature or initial tag, signers are asked to Adopt your Signature. See Adopting your Signature below for more information.</p>		<p>The sender is asking the signer to provide some supporting documentation. See Signer Attachments below for information about submitting the documents.</p>
	<p>Click the Sign Here or Initial tag to place a signature or initials in the document. If this is the first signature or initial tag, signers are asked to Adopt your Signature. See Adopting your Signature below for more information.</p>		<p>The sender is asking the signer to provide some supporting documentation. See Signer Attachments below for information about submitting the documents.</p>
	<p>After adding information to all the required tags, signers can review the document. After they are done reviewing the document, they click Confirm Signing to complete signing the process.</p>		<p>After adding information to a tag, the signer can click Next to go to the next tag or, in some cases, Next Page to go to the next page in the envelope.</p>

As the arrow leads the signer through the document, they use the following guidelines for filling out information:

Note: Some fields, such as signing date fields, are automatically filled in based on information available to the system. The signer cannot change or modify this information.

- To select an option button or checkbox, the signer clicks on the appropriate option button or checkbox. Note that the signer can only select one option button in a group.
- To select an option from a dropdown list, the signer clicks on the list and selects the appropriate option.
- To add other information in a boxed field, the signer types the requested information into the field and clicks **Next** or presses the **Tab** key to continue.
- To sign or initial a tag, the signer clicks the **Sign Here** or **Initial** tag.

Adopting your signature: The first time a signer clicks a **Sign Here** or **Initial** tag, they are asked to adopt a signature and initials.

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name Initials

[Select Style](#) [Draw](#)

Signature Style

DocuSigned by:
Kevin Smith
3143CD30CA0D40B...

DS
KS

[Change Style](#)

By clicking Adopt, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

To adopt their signature:

- The signer verifies their name and initials are correct. If not, they can change them as needed.
- The signer chooses if they will select a preformatted signature style or if they will draw their signature.

Note: Drawing a signature and initials can only be done if the signer's browser is HTML5 capable and drawing signatures is not disabled.

If the signer chooses to use a preformatted style, they can click **Change Style** to view and select a signature style.

The screenshot shows the 'Adopt Your Signature' interface. At the top, it says 'Adopt Your Signature' and 'Confirm your name, initials, and signature.' Below this is a 'Full Name' field containing 'Kevin Smith'. There are two buttons: 'Select Style' (highlighted in orange) and 'Draw'. Below the buttons is a 'Signature Style' section showing a preview of a signature and initials 'KS'. To the right of this preview is a 'DocuSigned by:' field containing the signature and initials 'KS'. Below the preview and 'DocuSigned by:' field is a list of five preformatted signature styles, each with a 'DocuSigned by:' field and initials 'KS'. The first style in the list is highlighted with an orange border. At the bottom of the interface, there is a disclaimer: 'By clicking Adopt, I agree that the signature purposes when I (or my agent) use them on signature or initial.'

If the signer chooses to draw their signature, they click **Draw** to show the blocks for adding their signature or initials.

The screenshot shows the 'Adopt Your Signature' interface. At the top, it says 'Adopt Your Signature' and 'Confirm your name, initials, and signature.' Below this are two input fields: 'Full Name' containing 'Kevin Smith' and 'Initials' containing 'KS'. There are two buttons: 'Select Style' and 'Draw' (highlighted in orange). Below the buttons is a 'Draw your signature' block with a 'Clear' button. Below the 'Draw your signature' block is a disclaimer: 'By clicking Adopt, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.' At the bottom right, there are two buttons: 'Adopt and Sign' (highlighted in yellow) and 'Cancel'.

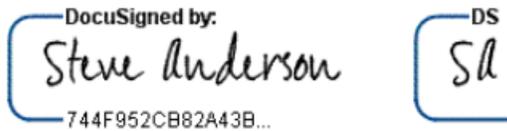
In the **Draw your signature** or **Draw your Initials** block they draw their signature/initials using a mouse or, for a touch-screens, their finger or a stylus. If they make a mistake, they can click **Clear** to reset the block.

Note: Signers can return to the preformatted signature styles by clicking **Select Style**.

- Finally the signer clicks **Adopt and Sign** to adopt and save their signature information and return to the document.

Signature and Initials Formatting

The appearance of the signature and initials depends on your account setting. Your customer administrator can set if the signatures and initials on documents, including the Certificate of Completion, for envelopes sent by the account appear with or without the DocuSign eSignature format. For more information about the DocuSign eSignature format and why to use it, see the *Account Administrator Reference Guide*.



DocuSign eSignature format enabled



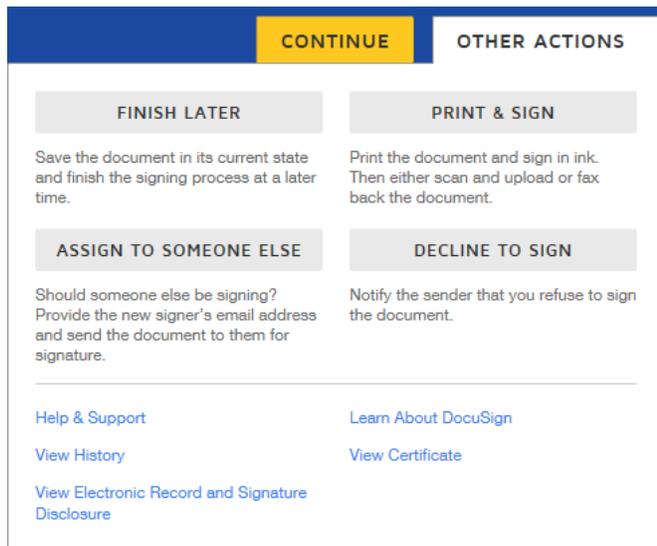
DocuSign eSignature format disabled

To determine the settings for your account, check with your administrator.

Other Actions

The Other Actions menu is available in the new signing experience and this section provides more information about the other actions available to signers.

Clicking **OTHER ACTIONS** shows the options available to signers while signing documents. The options are:



FINISH LATER: This option lets the signer exit the signing process, while saving the information that has been entered. They can return to finish signing the document later by using the link in the email notification.

PRINT & SIGN: This option lets the signer print and sign the document on paper. See the [Sign On Paper](#) section for more information about using this option. In some cases this option might not be available.

ASSIGN TO SOMEONE ELSE: This option can be used to send this document to another person when they should be the signer. The signer will be asked to provide the new signer's name, email address and a reason for changing the signer. The reason for changing the signer

is sent to person that sent the document, along with the new signer's name and email.

DECLINE TO SIGN: This option lets the signer decline to sign the document. They might be asked to provide a message for the person that sent the document telling them why you have declined to sign.

View History: This option shows the sending and signing history for the documents.

View Certificate: This option opens a new browser window with a PDF version of the certificate of completion, which includes information about the events, and the disclosure. The PDF can be saved or printed.

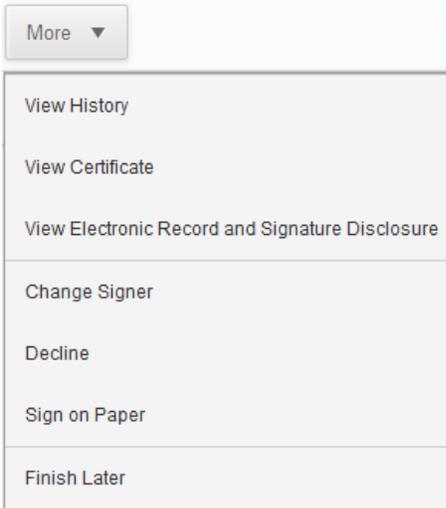
View Electronic Record and Signature Disclosure: This option shows the sender's Electronic Record and Signature Disclosure.

Learn About DocuSign: This link takes you to the DocuSign University page, which has more information about using DocuSign and what features are available.

Help & Support: This link takes you to the DocuSign Support page.

More Options

The More menu is available in the previous signing experience and shows the options available to signers while signing documents. The options are:



View History: This option shows envelope data and history.

View Certificate: This option opens a new browser window with a PDF version of the certificate of completion, which includes information about the envelope events, and the disclosure. The PDF can be saved or printed.

View Electronic Record and Signature Disclosure: This option shows the Electronic Record and Signature Disclosure for the envelope.

Change Signer: This option is used to send this document to another person to sign. You will be asked to provide the new signer's name, email address and a reason for changing the signer. The reason for changing the signer is sent to the person that sent the document, along with the new signer's name and email.

Decline: This option lets you decline to sign the document. You are asked to provide a message for the person that sent the document telling them why you have declined to sign.

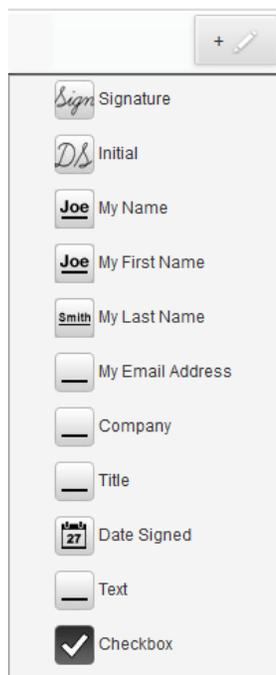
Sign on Paper: This option lets you print and sign the document on paper. See the [Sign on Paper](#) section for more information about using this option. In some cases this option might not be available.

Finish Later: This option lets you exit the signing process. You can return to sign the document later by using the link in the email notification.

Free-Form Signing

If the free-form signing option is used, recipients can place tags in the document as needed.

In the new signing experience the free-form signing menu is persistent on the left side of the browser, while the current experience uses a collapsing menu format.



When recipients open documents sent for free-form signing they can place tags in the document as needed. Recipients use the menu to add tags (Signature, Initial, My Name, My First Name, My Last Name, My Email Address, Company, Title, Date Signed, Text, or Checkbox) to the documents.

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

The My Name, My First Name, My Last Name, My Email Address, 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, printing a copy of the documents or viewing the completed document.

Sign On Paper Option

Sometimes, signers prefer to sign a document using pen on paper. The Sign on Paper feature allows signers to sign documents on paper, while still allowing you to take advantage of DocuSign's ability to store and manage documents electronically.

This section shows how signers would use the Print & Sign/Sign On Paper option in the [new](#) and [previous](#) signing experiences.

New Signing Experience

The welcome and instructions, along with any messages from the sender, is shown at the top of the browser.

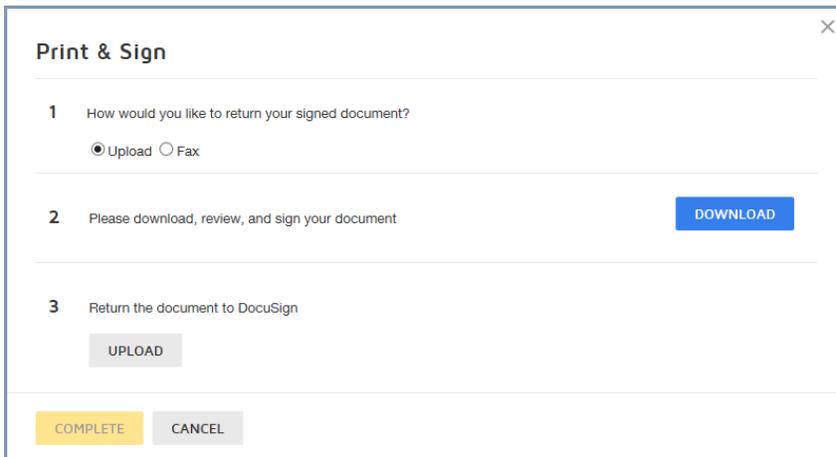


To print and sign your documents, click **OTHER ACTIONS**.



Then click **PRINT & SIGN**.

The Print and Sign dialog box is shown.



The next steps you take depends on how you want to return the requested documents; by uploading them or by faxing them. Follow the appropriate instructions below to submit the documents.

Uploading Your Documents

If you want to upload the signed document:

- Select the radio button for **Upload**.
- Click **DOWNLOAD** to download your documents.
- Print the documents using your normal printing method. Fill out and sign the printed pages as needed.

Create an electronic file version of the documents (for example scan the documents and save them as a file on your computer).

- Click **UPLOAD** to upload your completed documents.

Note: In some cases you might be automatically logged off from the signing process when printing, signing, and creating an electronic file takes too long. If you are logged off, you can return to the documents to upload them using the link in the email that was originally sent to you. Just follow steps 1, 2, and 3 to access the Print & Sign dialog.

Select the signed electronic file version of your document to upload. The file is uploaded and the file name is shown adjacent to the UPLOAD button. If you selected the incorrect file, click **remove** to remove the file and then upload the correct file.

Print & Sign

1 How would you like to return your signed document?
 Upload Fax

2 Please download, review, and sign your document **DOWNLOAD**

3 Return the document to DocuSign
UPLOAD ReplacementNotice.pdf - remove

COMPLETE CANCEL

- Click **COMPLETE** to upload the file.
- Go to [Step 4](#).

Faxing Your Documents

If you want to fax the document:

- Select the radio button for **Fax**.
- Click **DOWNLOAD** to download the fax cover page and your documents.
- Print the fax cover page and documents using your normal printing method.

After the fax cover page and documents are printed, click **COMPLETE** to exit the signing process.

- Fill out and sign the printed pages as needed.
- Follow the instructions on the printed fax cover page to fax the documents to DocuSign.

When faxing your documents, the DocuSign fax cover page must be the first page that is sent. The fax cover page has information that links your documents to the envelope and your documents might be lost if the cover sheet is not the first page.

When DocuSign receives the fax, your documents are matched with the sender's original request to complete the process.

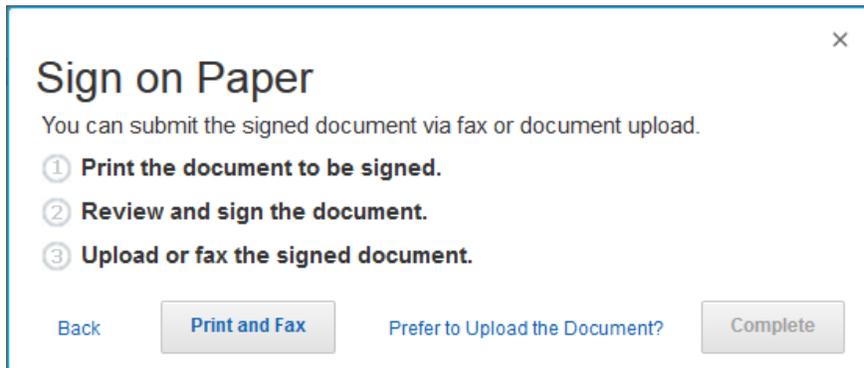
Note: if you change your mind and want to upload the documents, you can return to the document using the link in the email that was sent to you and after the document is opened, click **CANCEL FAX** to cancel the fax process and then follow the instructions for uploading your documents.

Previous Signing Experience

When the recipient receives the envelope and starts the signing process, they can select the Sign on Paper option by clicking **Sign on Paper**.



The Sign on Paper dialog box appears.



The actions the recipient takes depends on whether they will upload or fax the completed document.

Note: The recipient can also decide to sign the documents electronically by clicking **Back**.

Faxing a Document

To fax a signed document, the recipient:

- Clicks **Print and Fax**. A new browser window opens with the document and fax cover sheet.
- Prints, fills out and signs the document. The recipient then follows the instructions on the fax cover sheet to fax the document to DocuSign.
- After the documents have been faxed, the recipient clicks **Complete**.
- This completes the signing process.

Uploading a Document

To upload a signed document, the recipient:

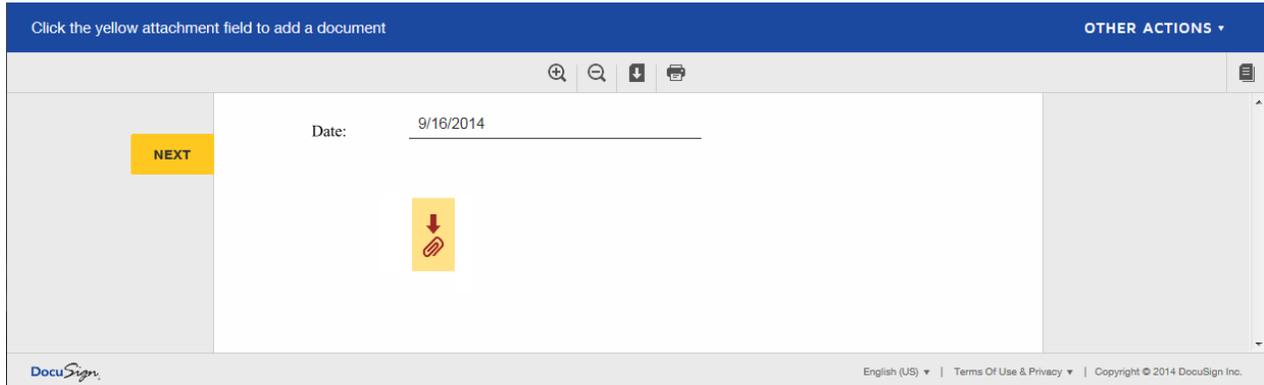
- Clicks **Prefer to Upload the Document?** A new browser window opens with the document.
- Prints, fills out and signs the document. Then scans the signed document and saves it as a file on their computer.
- Clicks **Browse** and selects the file to upload.
- Clicks **Complete** to upload the documents.
- After the documents have been uploaded, the signing process is completed.

Signer Attachments

This section shows how signers would add attachments in the [new](#) and [previous](#) signing experiences.

New Signing Experience

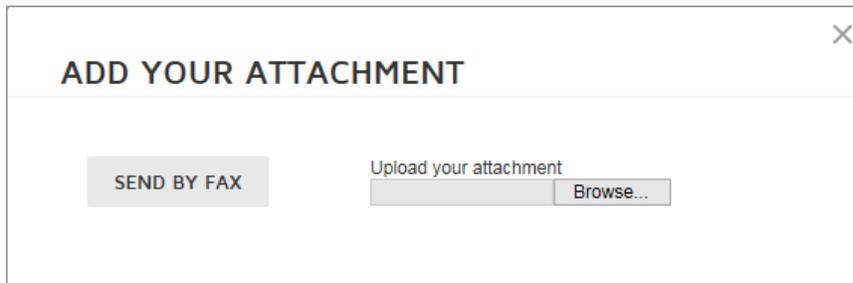
When you reach an attachment field, you are prompted to click the attachment field to add the supporting document.



The next steps you take depends on how you are submitting the requested documents; by uploading them or by faxing them. Follow the appropriate instructions below to submit the documents.

Uploading Your Documents

If you want to upload the requested document, you must have an electronic copy (such as a scanned copy) of the document saved as a file on your computer. Click the attachment field, the Add Your Attachment dialog box is shown.



Click **Browse...** and select the file to upload. The system attaches the file as a new page after the current page and replaces the attachment field with an upload icon.

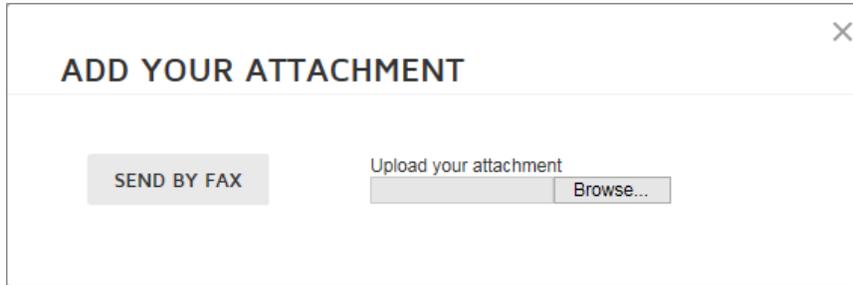
You will be asked if you want to add another attachment. Add other attachments as needed following the same upload process.

After uploading all your attachments, finish adding any more information to the document and review the documents.

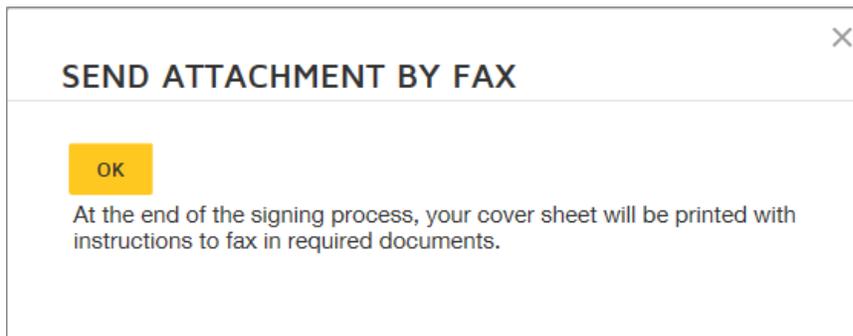
After you are done reviewing the document, click **FINISH**. to complete the signing process.

Faxing Your Documents

If you want to fax copies of the requested documents, click the attachment field, the Add Your Attachment dialog box is shown.



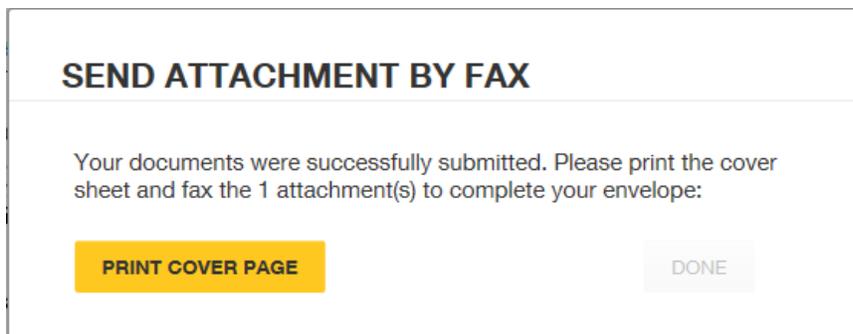
Click **SEND BY FAX**, the Send Attachment by Fax dialog box is shown. The dialog box informs you that you will be able to print a fax cover sheet at the end of the signing process. Click **OK** to continue.



The system replaces the attachment field with a fax icon. You can click the fax icon to cancel the fax process anytime until the fax is received by DocuSign.

Finish adding any more information to the document and review the documents. After you are done reviewing the document, click **FINISH** to complete the signing process.

After clicking **FINISH**, a second Send Attachment by Fax dialog box appears. Click **PRINT COVER PAGE**.



A new browser window opens with a fax cover page. Print the fax cover page.

IMPORTANT: When faxing documents you only need one fax cover page for all the requested documents.

After the fax cover page is printed, click **DONE** in the Send Attachment by Fax dialog box to finish the signing process.

Note: if you change your mind and want to upload the documents, you can return to the document using the link in the email that was sent to you and after the document is opened, click the fax icon to cancel the fax process and then follow the instructions for uploading your documents.

Follow the instructions on the printed fax cover page to fax the documents to DocuSign.

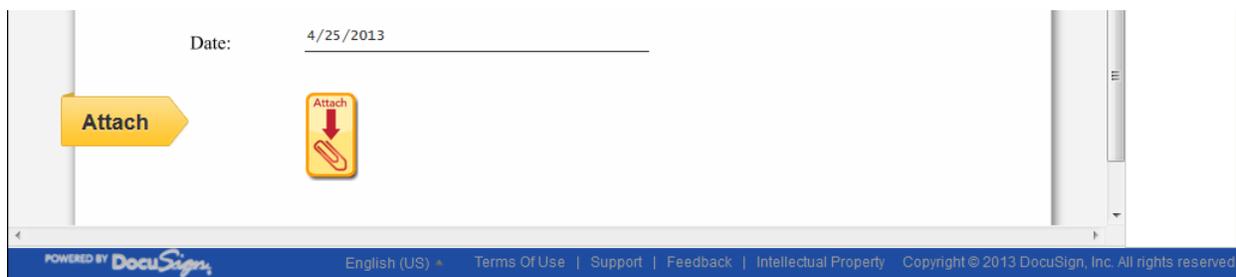
When faxing your documents, the DocuSign fax cover page must be the first page that is sent. The fax cover page has information that links the requested documents to the envelope and the documents might be lost if the cover page is not the first page.

When DocuSign receives the fax, your documents are matched with the sender's original request to complete the process.

Previous Signing Experience

The Signer Attachment feature shows a request for the recipient to provide supporting documentation to the sender by uploading the document to the DocuSign envelope during the signing process or by faxing the document.

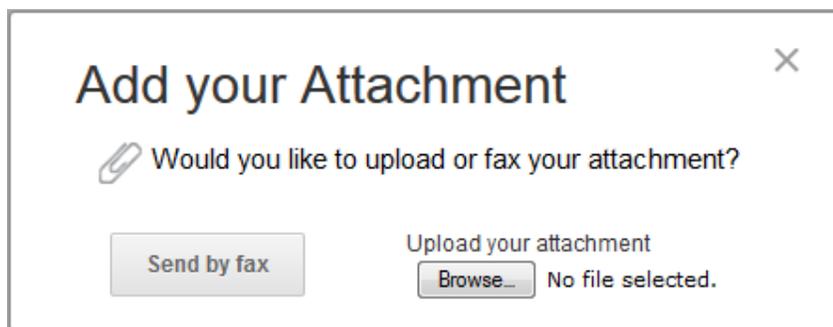
During the signing process, the recipient is prompted to provide a document.



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.



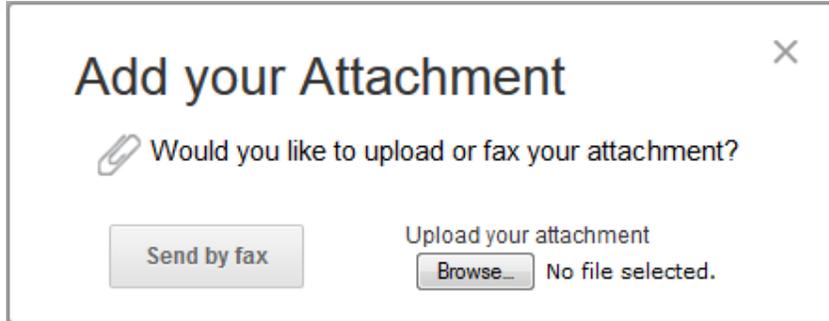
The recipient clicks **Browse...** and selects the file to upload.

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.

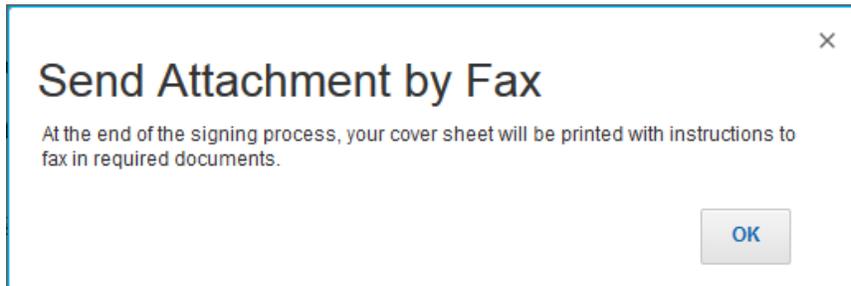
After the documents have been uploaded and all other tags are filled out or signed, the recipient completes the signing process normally.

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.

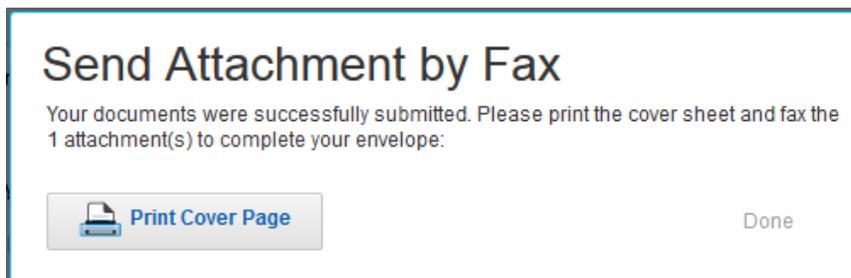


The recipient clicks **Send by fax**, the Send Attachment by Fax dialog box appears. The dialog box informs the signer that they will be able to print the fax cover sheet at the end of the signing process. The signer clicks **OK** to continue.



The system replaces the Attach tag 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.

Completing the Signing Process

The information on completing the signing processes for the [new](#) and [previous](#) signing experiences is outlined below.

New Signing Experience

After you have added information to all the required fields and any signatures and initials, the actions move to the bottom of the browser.

Uptown Garage
Hardy Building Garage

For an extra cost you can have an assigned parking location.

I would like an assigned parking location

Payment Method:

Bill me monthly
 Bill me weekly

DocuSigned by:
Bob Stack
1a2CH7710048a63A

Signature: _____
Date: 11/18/2014

Done! Click Finish to send the completed document.

FINISH OTHER ACTIONS ▾

DocuSign English (US) | Terms Of Use & Privacy | Copyright © 2014 DocuSign Inc.

You can stay, review the document, and make any changes to the information you have added to the required and optional information fields. After you are done reviewing the document, click **FINISH**.

Your signing information is saved and a message window stating that you have finished signing your documents is shown. You are given the option of downloading a PDF copy of the documents or printing a copy of the documents.

FINISHED SIGNING!

This document is complete. Sign up for a **FREE** DocuSign account to access it any time! You can also download or print using the icons above.

Email: _____

Password: _____

Confirm Password: _____

By clicking the "SIGN UP" button below, you agree to the [Terms and Conditions](#)

SIGN UP

- Save all your signed documents securely in one place.
- Electronically sign any document, even if it wasn't sent through DocuSign.
- Get signatures from others quickly and track progress.

LOG IN TO DOCUSIGN

A copy of this document has been saved to your DocuSign account. Please log in to view it.

Email: bstack@mailnesia.com

Password: _____

LOG IN NO THANKS [Forgot Password?](#)

Or log in using:

Windows, Google, Facebook, LinkedIn, Office 365, Yahoo!, Twitter, OneDrive

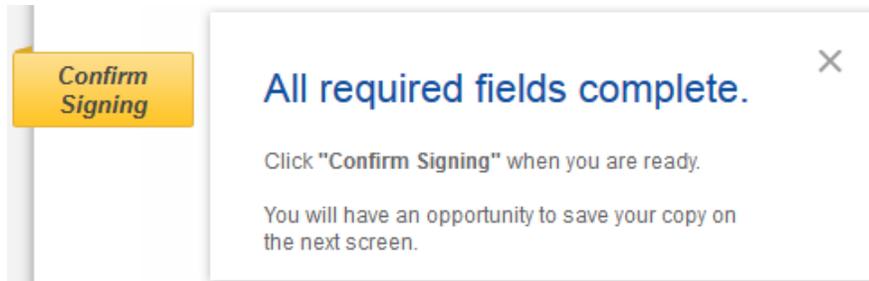
If you do not have a DocuSign account, you can sign up for a free DocuSign account and save the document in your account. If you already have a DocuSign account, you will be given the option to log in to your DocuSign account.

You can also just close the message window by clicking the **X** icon in the upper right corner.

After closing the message window, the browser displays a website designated by the sender.

Previous Signing Experience

When the signer has completed adding information to all the required tags in the envelope, the indicator arrow changes to a box that says Confirm Signing.



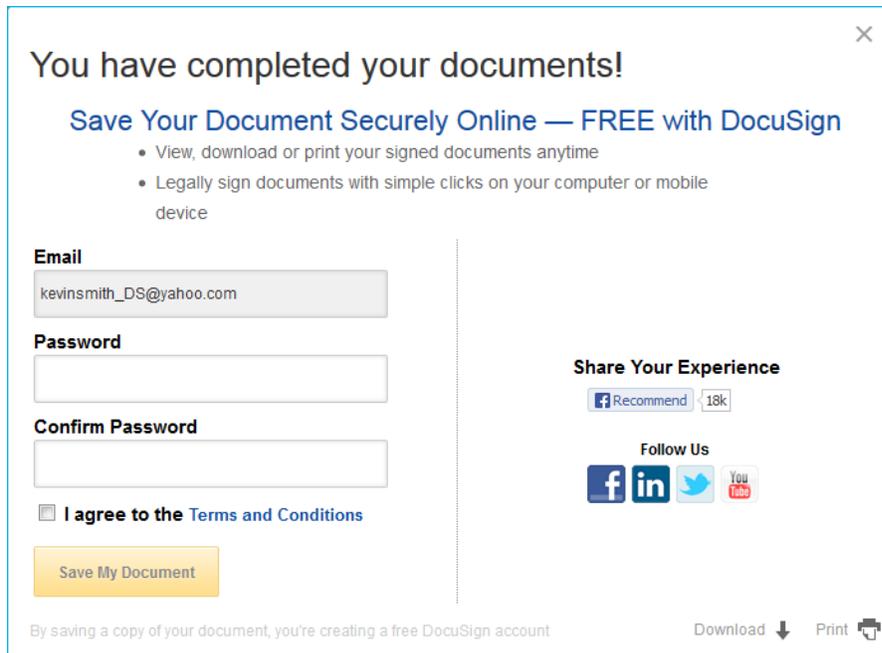
The signer can stay and review the document and make any changes to the information added and to optional information tags. After the signer is done reviewing the document, they click the **Confirm Signing** indicator.

The signer's information is saved and a message window stating the signer has completed the documents is displayed.

The signer is given the option of downloading a PDF copy of the documents or printing a copy of the documents.

Additionally, the signer can create a free DocuSign account and save the document in the account.

You can close the message window by clicking the **X** icon in the upper right corner.



After closing the message window, the browser displays a website designated by the sender.

Authentication Options

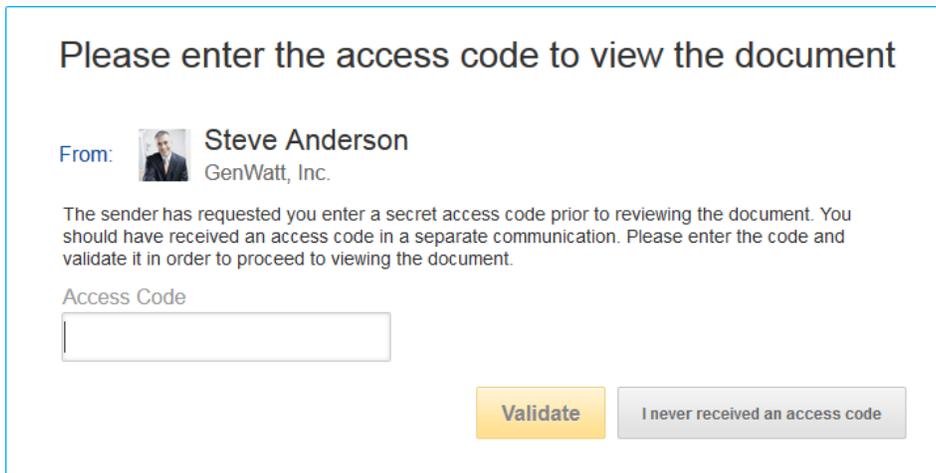
An important feature of DocuSign is the ability to add signer authentication to an envelope. Signer authentication is a way to require envelope recipients to verify their identity before they can access an

envelope. The type of security option selected determines what the recipient sees when they try to access the envelope. A recipient may have an Access Code security check combined with Phone Authentication or an ID Check.

What a recipient sees for each authentication option follows.

Access Code Authentication

If the Access Code option is enabled for a recipient, the recipient is presented with a security request page and must enter the code to access the documents for signing.



The screenshot shows a security request page with the following elements:

- Title:** Please enter the access code to view the document
- From:** Steve Anderson, GenWatt, Inc. (with a profile picture)
- Text:** The sender has requested you enter a secret access code prior to reviewing the document. You should have received an access code in a separate communication. Please enter the code and validate it in order to proceed to viewing the document.
- Form:** An input field labeled "Access Code".
- Buttons:** A yellow "Validate" button and a grey "I never received an access code" button.

The recipient enters the code and clicks **Validate** to complete the security request. The recipient has three attempts to enter the access code correctly.

The recipient can send a message to the sender saying that they do not have the code by clicking **I never received an access code**.

After the access code has been correctly entered, the recipient is taken through the normal signing process.

SMS Authentication:

If the SMS Authentication option was selected for a recipient, the recipient is presented with a request page and must select a phone number to use for authentication. The recipient clicks **Send SMS** to continue or can click **Cancel** to postpone the call and return later.

Security Requests from Sender

From:  Steve Anderson
GenWatt, Inc.

SMS Authentication

In order to access this document, you need to confirm your identity using your mobile phone.

1. Choose a phone number below and click the "Send SMS" button to receive a text message.
2. Enter the access code on the following page.

Authenticating Signer Name: **Kevin Smith**

Please select a phone that can receive text messages so you can authenticate:

- 111-222-3333
 222-333-4444

Send SMS

Cancel

If you do not have access to your mobile phone at this time, click "Cancel" and retry when you have access.

After clicking **Send SMS**, a SMS text message with a passcode is sent to the recipient. The recipient enters the code and clicks **Confirm Code** to complete the security request. The recipient has three attempts to enter the code correctly.

Security Requests from Sender

From:  Steve Anderson
GenWatt, Inc.

SMS Authentication

SMS messages sent to your mobile phone. You should receive it momentarily.test

Enter the code you received in the SMS message in the field below and press Confirm Code.

Confirm Code

Cancel

If you do not receive an SMS message, click "Back", verify the mobile phone number and try sending the SMS message again.

After the code is correctly entered, the recipient is taken through the normal signing process.

Phone Authentication:

If the Phone Authentication option was selected for a recipient, the recipient is presented with a security request page and must select a phone number, or type a new number, to use for authentication. The recipient clicks **Call** to continue or can click **Cancel** to postpone the call and return later.

Security Requests from Sender

From:  **Steve Anderson**
GenWatt, Inc.

Phone Authentication

The sender has selected phone authentication.

1. Choose or enter a phone number where you can receive a phone call, and click the "Call" button below.
2. You will receive a phone call, and will be prompted to provide a code and speak your name.

Authenticating Signer Name: **Kevin Smith**

Please select a phone that you currently can answer to authenticate:

- 222-333-4444
 333-444-5555
 or Enter phone number (with area code):

Ext.

Cancel

Call

If you are not near a phone to authenticate you, click "Cancel", and return when you are near one of the above phones.

After clicking **Call**, the recipient is presented with an authentication code and the system places a call to the selected (or entered) number.

Security Requests from Sender

From:  **Steve Anderson**
GenWatt, Inc.

Phone Authentication

Call Placed. Your phone should ring within 10 seconds.

When your phone rings, you must enter the following Authentication Code into your phone.

Authentication Code: 91643

Once you enter the code in response to the telephone prompt, and provide a voice sample, you will be authenticated.

Cancel

Phone Authentication Complete

If your phone does not ring within a minute, click "Back" and ensure you have entered the correct phone information.

After answering the phone, the recipient is prompted to use the phone keypad to enter the authentication code and then speak their name, which might be saved for the sender if that option was selected when the envelope was created.

After the authentication code is authenticated, the system informs the recipient to follow on-screen instructions and the recipient is taken through the normal signing process.

ID Check:

If the ID Check authentication option was selected for a recipient, the recipient is prompted to complete an identity check. An ID check presents a set of questions about recipient and information from recipient's past based on data available in public records (such as where they have lived).

The recipient will initially be prompted to enter some personal information.

Security Requests from Sender

From:  **Steve Anderson**
GenWatt, Inc.

ID Check - Personal Information

Enter your home address. This information, along with your name will be used to generate a list of questions to verify your identity.

<p>Required Information (Home Address)</p> <p>Kevin Smith</p> <p>Street 1: <input type="text"/></p> <p>Street 2: <input type="text"/></p> <p>City: <input type="text"/></p> <p>State: <input type="text"/></p> <p>Zip: <input type="text"/> - <input type="text"/></p>	<p>Optional Information</p> <p>Last 4 digits of SSN: <input type="text"/></p> <p>Date of Birth: <input type="text"/> / <input type="text"/> / <input type="text"/> mm / dd / yyyy</p>
--	---

You must enter required and valid information before you can continue.

After entering the information and clicking **Next**, the recipient is presented with a set of questions based on publicly available information.

Security Requests from Sender

From:  **Steve Anderson**
GenWatt, Inc.

ID Check - Identification Questions

These questions are being generated as a means of an identity check requested by the document sender. None of this information is provided to the document sender or to anyone except you.

In which of the following housing complexes or communities have you ever lived or owned property?

Oro Valley Estates Summit Ridge
 Silver Creek Worthington Fields
 Stonebridge Country I have never been associated with any of these communities.

With which of the following addresses have you ever been associated (ALL correct answers must be selected)?

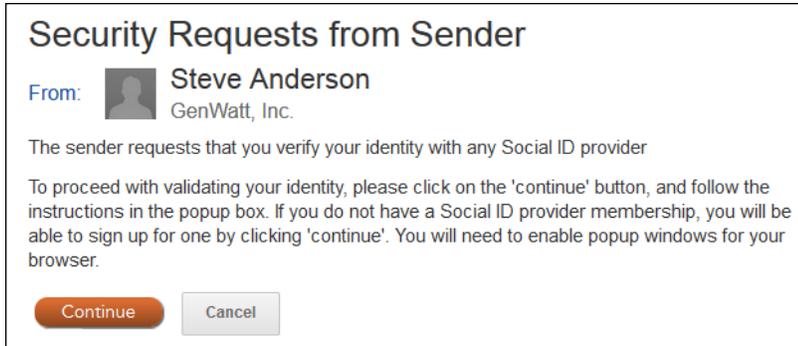
14600 Paul Revere Ln
 2412 SW Holden St
 26228 33rd Ave S
 3057 Pawtucket Rd
 4824 192nd Dr NE

I have never been associated with any of these addresses

The recipient answers and submits the questions. If the ID check is successfully completed, the recipient is taken through the normal signing process.

LiveID or Any Social ID Authentication:

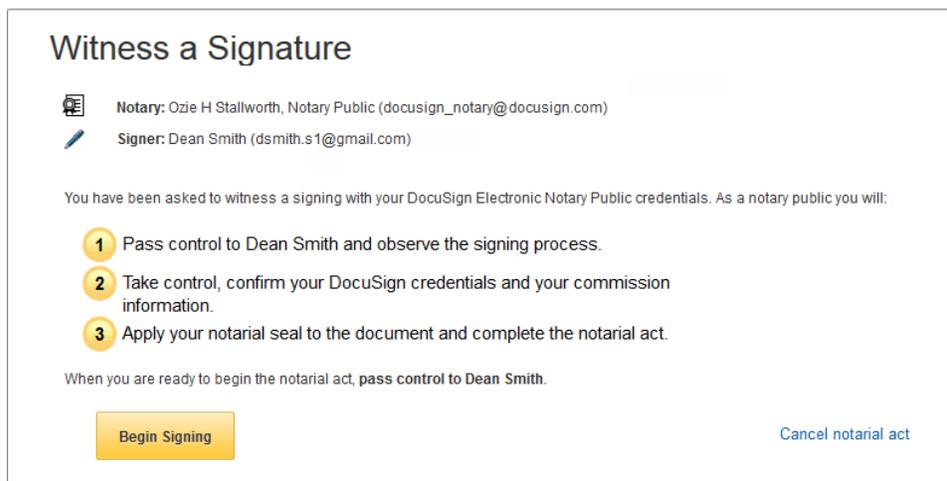
If the LiveID or Any Social ID authentication option was selected for a recipient, the recipient is presented with a security request page explaining the security check. The recipient clicks **Continue** and must enter their LiveID or other social ID information to access the documents for signing.



Hosting an Electronic Notary Signing Session

To conduct an electronic notary signing session, the authorized electronic Notary and Signer must be in the same location and, for this release, in the State of North Carolina. When the signer is ready to sign the document, follow the procedure below to complete electronic notary signing session.

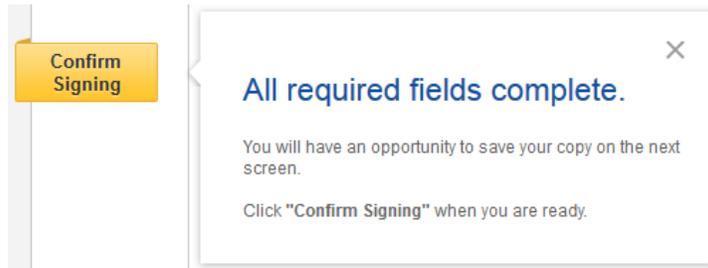
1. The Notary opens the email and clicks **Review Documents** to start the signing process. Alternately, the Notary can open the envelope from their DocuSign account.
2. The overview dialog box appears. Review the information and click **Continue**.



The Notary passes control of the device used for signing to the Signer.

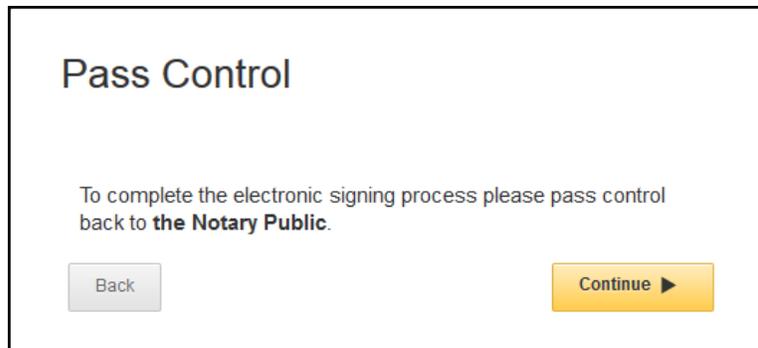
3. The Signer goes through the standard orientation process and, if required by the Sender's account, consents to use electronic records and signatures.
4. The Signer adds information, initials and signatures as needed to the document. The Notary can assist the signer as needed.

5. After the Signer completes adding information to all the required tags in the envelope, the Confirm Signing indicator and message box appears.

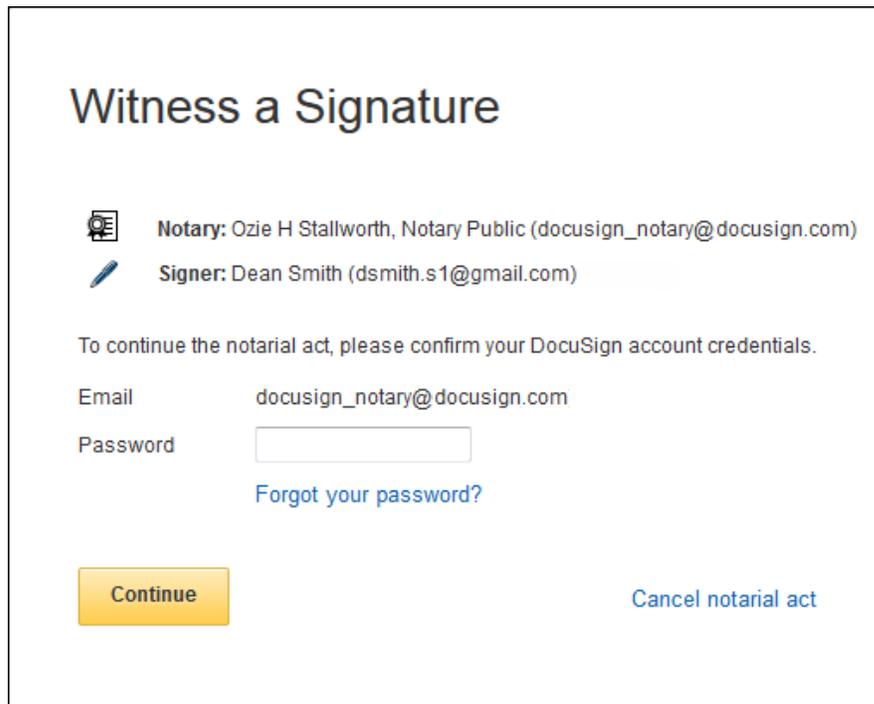


The Signer can stay and review the document and make any changes to the information and to optional information tags.

6. After the Signer completes reviewing the document, click **Confirm Signing**. The Signer is asked to pass control back to the Notary Public. The Notary clicks **Continue**.



7. The Notary logs on to their DocuSign account to enter verification information and add other information to complete the signing process.



The Notary types their password and clicks **Continue**.

8. The Notary uses the drop-down list to select their jurisdiction, selects the form of ID used to verify the Signer's identity and adds any notes about the signing session. This information is entered in the DocuSign Notary Journal.

If a Credible Witness is used for the notary process, the Notary clicks **Add witness**. The Notary adds the Name and Address information for the witness, and then has the witness draw their signature in the **Signature** field. Credible witness requirements vary between states, the Notary is responsible for ensuring that the applicable requirements are followed.

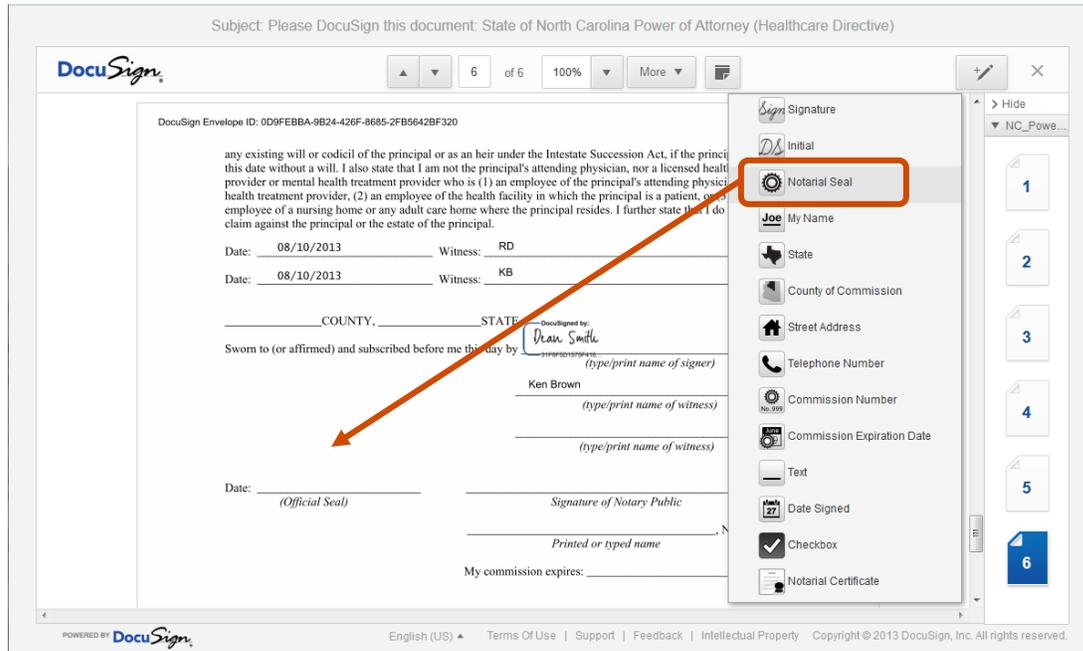
Note: The browser used for signing must be HTML5 compatible to allow the witness to sign.

The Notary clicks **Continue Notarial Act** to add their Notary Seal and, optionally, add additional notary information or certificates.

9. The Notary uses the Notary Tag palette to click and place tags onto the documents. After adding a tag the palette contracts to allow the Notary to work with a tag.

The Notary clicks  to expand the palette to add additional tags.

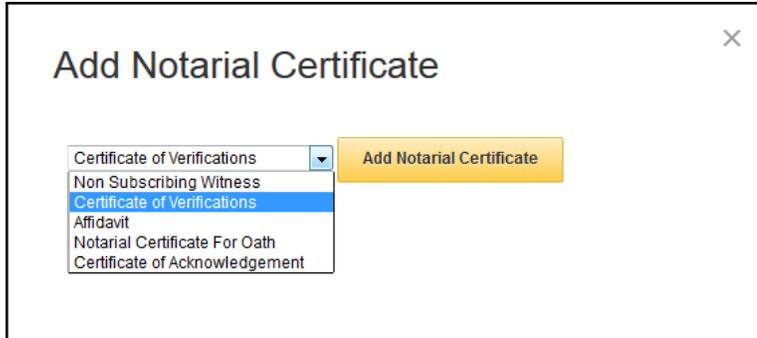
To add a tag from the palette, the Notary clicks on the tag and then clicks on the appropriate location in the document to place the tag.



The tags on the Notary Tag palette are used as follows:

- The **Signature** or **Initial** tags are used to place the Notary's adopted signature or initials on the documents.
- The **Notary Seal** tag is used to place the Notary's electronic notary information on the documents.
- The **My Name**, **State**, **County**, **Street Address**, **Telephone Number**, **Commission Number** and **Commission Expiration Date** tags are used to place the Notary's pre-filled information on the documents. These items can be edited, if needed, without changing the information in the Notary's DocuSign profile.
- The **Date Signed** tag is used to place the current date on the documents.
- The **Checkbox** tag is used to place a checked box on the documents.
- The **Text** tag is used in cases where other information needs to be placed on the documents. To use a **Text** tag, the Notary clicks and places the tag on the document and then types information directly into the tag. The tag can be resized to have all the information fit.

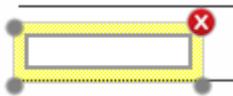
- The **Notary Certificate** tag is used to add other Notary Certificate pages to an envelope. To add a **Notary Certificate** tag the Notary clicks the tag on the palette and places it in a blank location on the page. The Add Notary Certificate dialog box appears. The Notary selects the appropriate certificate from the drop-down list and then clicks **Add Notarial Certificate**.



The certificate is added as a new page after all the other pages in the envelope and is ready to be filled out. The Notary clicks on the new page in the document map on the right side of the window to go to the certificate and can add tags from the palette as needed.

Working with tags:

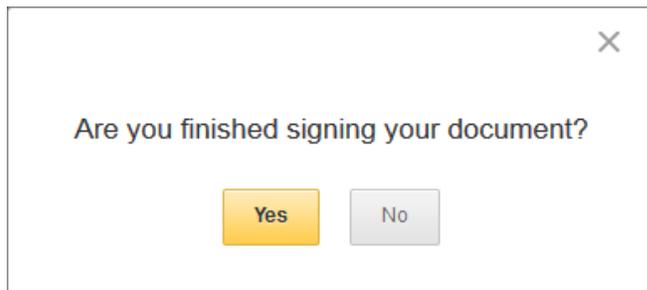
- To reposition a tag, click on the tag to select it and then drag it to a new location.
- To resize a tag, click on it to select it and then drag a gray dot to change the size.



- To remove a tag from the document, click on the delete icon (X) on the tag.

10. After the Notary has placed all the tags on the documents, they click **Finish**.

11. DocuSign asks the Notary to confirm they are finished signing. They click **Yes** to complete signing or **No** to continue adding tags to the documents.



The electronic notary signing session is complete. Emails are sent to the Signer and Sender, and information about the signing session is added to the Notary's Notary Journal.

Note: The Notary does not get a copy of the completed documents and cannot view the documents through their DocuSign account.

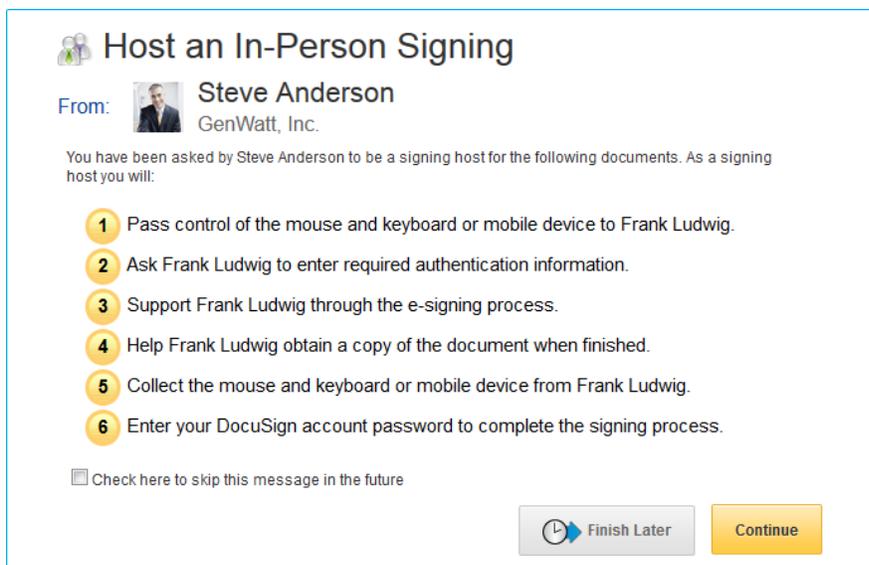
Conducting an In Person Signing Session

The In Person Signing feature lets you use DocuSign for electronic signatures even if the signer does not have access to email or a computer. This procedure is used by the Signing Host and recipient to sign documents sent for In Person signing. For more information about creating and sending an envelope for in person signing, see [Sending for In Person Signing](#).

When the signer is ready to sign the document, follow the procedure below to complete an in person signing session.

Important: The dialog boxes that provide additional instructions for signing hosts and signers can be enabled, disabled, and modified using the account branding signing resource file. Contact your DocuSign Account Administrator for more information about the dialog boxes and resource file.

1. Open the email and click **Review Documents** to start the signing process.
2. The signing host overview dialog box is shown. Review the information and click **Continue**.



The screenshot shows a dialog box titled "Host an In-Person Signing" from Steve Anderson at GenWatt, Inc. It contains a list of six numbered steps for the signing host to follow. At the bottom, there is a checkbox for "Check here to skip this message in the future" and two buttons: "Finish Later" and "Continue".

Host an In-Person Signing

From:  Steve Anderson
GenWatt, Inc.

You have been asked by Steve Anderson to be a signing host for the following documents. As a signing host you will:

- 1 Pass control of the mouse and keyboard or mobile device to Frank Ludwig.
- 2 Ask Frank Ludwig to enter required authentication information.
- 3 Support Frank Ludwig through the e-signing process.
- 4 Help Frank Ludwig obtain a copy of the document when finished.
- 5 Collect the mouse and keyboard or mobile device from Frank Ludwig.
- 6 Enter your DocuSign account password to complete the signing process.

Check here to skip this message in the future

3. The initial view depends on if the sender's account requires an In Person Signer ID question:
 - If the sender's account is set up to require an ID question, the system asks the signing host to collect the information. Type the information into the system and click **Continue**.



The screenshot shows a dialog box titled "Collect Signer Identification" from Steve Anderson at GenWatt, Inc. It prompts the user to collect identification for Frank Ludwig, specifically a Driver's License ID. There is a text input field for the ID and two buttons at the bottom: "Finish Later" and "Continue".

Collect Signer Identification

From:  Steve Anderson
GenWatt, Inc.

Please collect the required Identification for Frank Ludwig

Driver's License ID

Note: The In Person Signer ID question information is saved and viewable in the Certificate associated with the envelope.

- If no question is required or after entering the required information, the normal signing process starts.
4. The signer completes any security authentication, providing information and answering questions as needed.
 5. The signer goes through the standard orientation process and, if required, consents to use electronic records and signatures.
 6. The signer adds information, initials and signatures as needed to the document. The signing host can assist the signer as needed.

Adopting a signature: The first time the signer clicks a **Sign Here** or **Initial** tag, the signer is asked to adopt a signature and initials.

- To adopt a signature, the signer verifies that the signing name and initials are correct. The signer can change the name or initials as needed by typing in the **Full Name** and **Initials**.
- The signer chooses if they will select a preformatted signature style or if they will draw their signature.

Note: If the browser is HTML5 capable and the sender has enabled this option, the signer can click **Draw**, to write out their own custom signature.

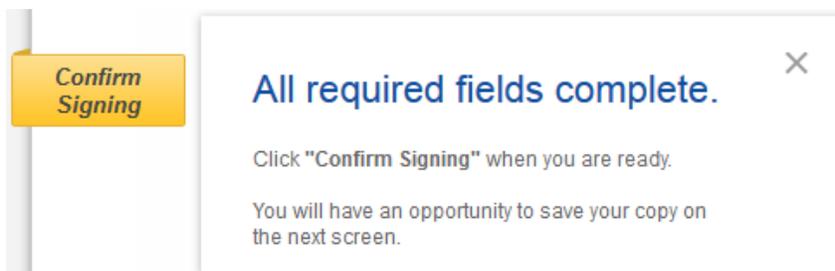
If the signer chooses to use a preformatted style, they can click **Change Style** to view and select a signature style. This style is used for all signatures and initials in the document.

If the signer chooses to draw their signature, they click **Draw** to show the blocks for adding their signature or initials. In the **Draw your signature** or **Draw your Initials** block they draw their signature/initials using a mouse or, for a touch-screens, their finger or a stylus. If they make a mistake, they can click **Clear** to reset the block.

- The signer clicks **Adopt and Sign** adopt and save their signature information and return to the document.

Note: A signature or initial can be removed from the document by clicking on the signature or initial. The signature/initial is replaced with a signature/initial tag.

7. After the signer has completed adding information to all the required tags in the envelope, the indicator arrow changes to a box that says Confirm Signing and a message box.



The signer can stay and review the document and make any changes to the information and to optional information tabs. After they are done reviewing the document, click the **Confirm Signing** indicator.

The signer has the option of adding an email address where a copy of the completed documents can be sent and/or printing the documents.

Save your Copy

Frank Ludwig, please enter your email address so a copy of the signed document can be sent to you after all people have signed.

Email Address

 Print  Continue ▶

If the signer does not want to enter an email, they click **Continue** and pass control back to the host.

8. The signing host is asked to log on to their account, which completes the signing process.

Templates

Templates help streamline the sending process when you frequently send the same or similar documents. Templates allow you to create a standard document, with set recipient roles, signing tags and information fields. Templates can also contain the signing instructions for the document and any signature attachments.

When there are some differences in the information needed for a document, a sender can still use a template to provide some recipient and tag information, while still allowing the sender to make additions and changes to the document before sending.

Template Last Modified and Used Information

Templates that are created or modified after June 6, 2014 will show the date the template was last modified and the name of the user that modified the template. To view the information, select a template and view the information in the Detail Panel.

Summary Document

Envelope Status: Template

Envelope Subject: Please DocuSign this document: General Agreement Form.pdf

Modified: 5/13/2014 8:18:17 AM PT | Steve Anderson (steve.anderson_ds@yahoo.com)

Pages: 1

1. Created by Steve Anderson (steve.anderson_ds@yahoo.com) | 6/20/2013 11:50:21 AM PT
2. Recipient () | Signer 1 at route Signer 1
3. Recipient () | Signer 2 at route Signer 1
4. Recipient Steve Anderson (steve.anderson_ds@yahoo.com) | Legal CC at route CarbonCopy 2

Additionally, you can get a quick view of when a template was last used or modified by placing your cursor over the template Auto-Match icon.

Shared	Auto-Match	Name
		Confidentiality Agreement Steve Anderson
		Template will try to be Auto-Matched, Last Used: Tue 5/13/14 Steve Anderson

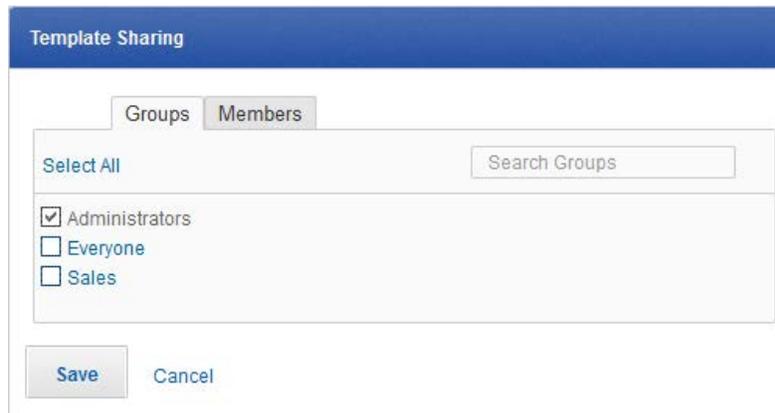
Sharing Existing Templates

Sharing a template allows other users to access and use the template to send envelopes. You can change the sharing options for existing templates through the Classic DocuSign Experience **Manage** tab or by opening each template and editing it. The **My Templates** folder contains the templates you have created or own. You can only share templates you created or own with groups and other users.

Note: If you are an administrator for the account, you will see an additional **All Account Templates** folder that has all the templates, shared or unshared, in the account. Administrators can share any template with groups and users.

To share existing templates:

1. With the **Manage** navigation tab selected, in the **Templates** section of the navigation panel, click the **My Templates** folder.
2. Find and select the template you want to share. You can select multiple templates.
3. Click **Actions** and then select **Share**. The Template Sharing dialog box is displayed.



If you selected multiple templates to share: a blank box indicates all the templates are not shared with any Groups/Members, a checked box indicates the templates are shared with all the Groups/Members, a red question mark (?) indicates the template is shared with some, but not all, Groups/Members.

- In the **Groups** tab, select the groups that will have access to the template. Click **Select All** to select all the groups in the list. All templates are automatically shared with the Administrators group.
- Click the **Members** tab. Select the members that will have access to the template. Click **Select All** to select all the members in the list.

Note: Due to the way Group and Member template access is tracked, Members will not be shown as selected when viewing the Members tab even if the Member is part of a selected Group.

4. Click **Save** to save the template sharing information.

Creating a New Template

Before creating a template, DocuSign recommends that you plan the information needed and the layout of your template. You can always edit the template later, but it is easier to create the template when you know the information you want to present in the template as you are creating it.

Before creating the template, you should answer the following questions:

- What document(s) will be used for the template?
- What are the roles of the recipients who will be signing?
- Does the template need a pre-set standard message?
- Where in the document will the recipients sign and add information?

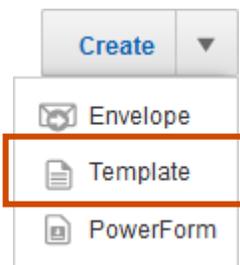
After determining what is needed in the template, you are ready to create the new template.

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 Support (support@docusign.com) for assistance.

Creating a new template is similar to creating a new envelope. The main change is that you can add recipient roles in addition to actual recipients. A template can contain multiple documents, which can have multiple pages, and can be sent to several recipients.

IMPORTANT: When creating a template, you need to be aware of the Data Population Scope setting for your account. If the account setting is **Envelope**, DocuSign tags with the same Label will populate with the same data when a recipient enters or modifies information in the tag for all documents in the template. If the account setting is **Document**, only DocuSign tags with the same Label and in the same document will populate with the same data when a recipient enters or modifies information in the tag.

1. Click the down arrow on the **Create** button and select **Template**.



Alternately, you can click **Actions** and select **New Template**.

The Prepare Template page is displayed.

2. Type the name for your template in the **Template Name** field.

Template Summary

Template ID: 2339F209-632E-4FC5-9406-92EE2AEB5B3B

Template Name
(required)

Description

Password protected

Share With | **Groups** | Members

Select All Search Groups

Administrators
 Everyone
 Sales

3. Optionally, type a description of the template in the **Description** field.
4. Optionally, you can also set password security so that only users that know the password can use the template.

Select the **Password protected** check box, the New Password dialog appears. Type the password in the **New Password** field, retype the password in the **Verify Password**, and then click **Save**.

5. Optionally, you can share the template with groups or other account members. To share a template:
 - In the **Groups** tab, select the groups that will have access to the template. Click **Select All** to select all the groups in the list. All templates are automatically shared with the Administrators group.
 - Click the **Members** tab. Select the members that will have access to the template. Click **Select All** to select all the members in the list.

Note: Due to the way Group and Member template access is tracked, Members that are part of a selected Group are not shown as selected when viewing the Members tab.

6. Go to the Documents for Signature section to add documents to the template.

Adding Documents to a Template

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

1. Select the source of your document:

Documents for Signature

Browse from my Computer

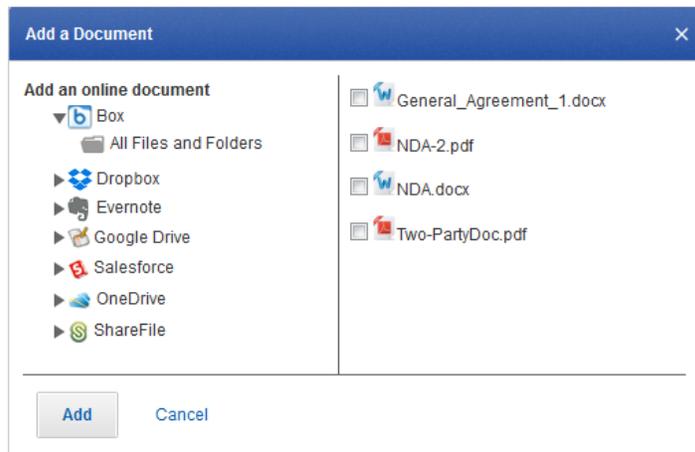
- or -

Choose an Online 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 template and a thumbnail image of the document is added to the section.

- To upload an external document: click **Choose an Online Document**, the Add a Document dialog box is displayed. Select the location of the online document you want to upload on the left side of the dialog box. Select the document and then click **Add**. The document is added to the template 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 or Google Drive, you might need to log on to the external document source.

2. Repeat Step 1 to add another document to the template.
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 replace the document.
 - If you have multiple documents in the template, you can 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 template roles and recipients.

Adding Recipient Roles

In the Recipients and Routing section you add recipient roles 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.

If your account is enabled to send bulk recipient files, you can use bulk recipients in your template. See [Creating a Template with Bulk Recipients](#) for more information about adding bulk recipients to a template.

1. Type the Recipient Role. Click **Add Signer** to add the role to the list with a Sign recipient Action or click **Add CC** to add the role to the list with a Receive a copy recipient Action.



The screenshot shows a window titled "Recipients and Routing". Inside, there is a label "Recipient Role" above a text input field. Below the input field are two buttons: "Add Signer" and "Add CC".

If you know the information for the recipient role, type the Email address and Name in the appropriate fields. As you type, the system will provide suggestions to auto-fill the fields based on entries in your Address Book.

2. Recipient Actions: After adding a recipient role, you can select the Action for the recipient, this sets the actions a recipient can perform. When you add a recipient by clicking **Add Signer**, the recipient Action is set to Sign. When you add a recipient by clicking **Add CC**, the recipient action is set to Receive a copy. An envelope must have at least one Signer or Acknowledge receipt recipient. The different recipient actions are described below:
 - **Sign:** Use this action if your recipient must sign, initial, date or add data to form fields on the documents in the envelope.
 - **Sign in person:** Use this action if the signer is in the same physical location as a DocuSign user who will act as a **Signing Host** for the transaction. The recipient added is the Signing Host and new separate *Signer Name* field appears after **Sign in person** is selected. Type the name of the signer in the Signer Name field. See [Sending for In Person Signing](#) for more information about this recipient action.
 - **Acknowledge receipt:** Use this action if the recipient must receive the completed documents for the envelope to be completed, but the recipient does not need to sign, initial, date or add information to any of the documents.
 - **Receive a copy:** Use this action if the recipient should get a copy of the envelope, but the recipient does not need to sign, initial, date or add information to any of the documents. This type of recipient can be placed in any order in the recipient list. The recipient receives a copy of the envelope when the envelope reaches the recipient's order in the process flow and when the envelope is completed.
 - **Address recipients:** This recipient can add name and email information for recipients that appear after the recipient in workflow order. This recipient type is only available if the Send to Manage feature is enabled for the sender and document visibility is not enabled. See [Agent Managed Envelopes](#) for more information about this recipient action.
 - **Manage envelope:** This recipient has the same management and access rights for the envelope as the sender and can make changes to the envelope as if they were using the Advanced Correct feature. This recipient can add name and email information, add or change the routing order and set authentication options for the remaining recipients. Additionally, this recipient can edit signature/initial tags and data fields for the remaining recipients. This recipient must have a DocuSign account and is only available if the Send to Manage feature is enabled for the sender. See [Agent Managed Envelopes](#) for more information about this recipient action.
3. Identifying Recipients: Optionally, you can select how to Identify a recipient.

Note: In some cases, such as Phone Authentication, the sender might need to enter additional information for identifying a recipient.

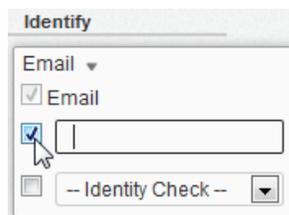
Click on the **Identify** list to select the authentication options you want to use for the recipient.



By default, Email identification is selected. Other options, Access Code, Phone Authentication, ID Check, Live ID and Social ID items can be selected for the recipient. The identification options available depend on your account settings. Each authentication option is described below:

Note: You can add Access Code authentication and one other authentication type for a single recipient.

- **Access Code:** The Access Code option requires your recipient to enter an access code before they can view the envelope.



To enable access code security option, select the **Access Code** check box and type the access code into the field. The access code can include upper case or lower case letters, numbers, and special characters. You must provide this access code to your recipient. It is recommended that you provide the code over the phone or using some other secure method. There is no additional fee for using this authentication check. The maximum length of an Access Code is 50 characters.

Note: There might be requirements for the access code if your account has enabled the Access Code Format option. Check with your administrator to determine if there are any access code requirements for your account.

To require that an Access Code is used for this recipient role, select **Access Code Required**.

- **SMS Authentication:** The SMS Authentication option asks the recipient to select a mobile phone number that a one-time passcode text message can be sent to for authentication. DocuSign sends the passcode to the phone number and the recipient must enter the passcode to open the envelope.

The screenshot shows the 'Identify' form with the following options:

- Email, ID ▾
- Email
- Access Code
- SMS Auth ▾
- SMS Authentication
 - Home 111-222-3333
 - Home 222-333-4444
 - Work 333-444-5555
 - US/Canada ▾
 - New Number

To enable SMS Authentication, select the **Identity Check** checkbox and then select **SMS Auth** from the list. The SMS Authentication information for the recipient appears.

Note: The number used for SMS Authentication must be able to accept an SMS text message.

- Select phone numbers that the recipient can choose from for use during the authentication phone call. The phone numbers listed here are associated with the Address Book entry for the recipient. If the recipient does not have any phone numbers in the Address Book or is not in your Address Book, no numbers are shown.
 - You can also select to add a phone number for the recipient. Select the Country for the phone number, type the phone number and, if the number has an extension, type the extension number.
- **Phone Authentication:** The Phone Authentication option asks the recipient to select or type a phone number to use for authentication and then they are presented with a validation code while the system places a call to the number. After answering the phone, the recipient is prompted to enter the validation code and speak their name. There is an additional fee for using this authentication check.

Note: Do not use the Phone Authentication if your recipient cannot connect to the Internet and use their telephone at the same time.

The screenshot shows the 'Identify' form with the following options:

- Email, ID ▾
- Email
- Access Code
- Phone authenticator ▾
- Phone Authentication
 - Home 111-222-3333
 - Home 222-333-4444
 - Work 333-444-5555
 - US/Canada ▾
 - New Number
 - Ext.
 - Recipient may provide

To enable Phone Authentication, select the - **Identity Check** - check box and then select **Phone authentication** from the list. The Phone Authentication information for the recipient appears. If the recipient name and email is not specified you can only select the **New Number** or **Recipient may provide** options.

Important: If phone authentication is selected and the system does not have a number to dial for the recipient (either by allowing the recipient to enter a number, or from the Address Book or by the entering a number), you cannot complete the sending process.

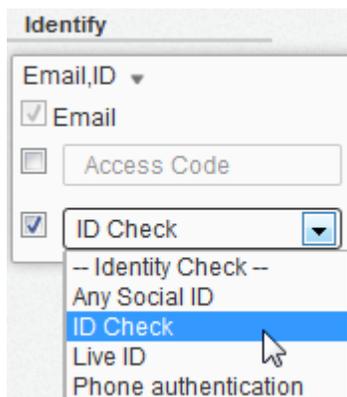
- Select phone numbers that the recipient can choose from for use during the authentication phone call. The phone numbers listed here are associated with the Address Book entry for the recipient. If the recipient does not have any phone numbers in the Address Book or is not in your Address Book, no numbers are shown.
 - You can also select **New Number** to add a phone number for the recipient. Select the Country for the phone number, type the phone number and, if the number has an extension, type the extension number.
 - Additionally, you can select **Recipient may provide** to allow the recipient to type their own phone number.
- **ID Check:** The ID Check option asks the recipient to provide some initial personal information (current address is required, but there is other optional information the recipient can enter) and then answer a set of questions before the recipient can view the envelope. The questions are based on data available in public records (such as where they have lived).

The ID Check is a knowledge-based authentication provided by RSA. This service is often used by many banks to validate the ID of recipients.

The ID Check option might not be useful for recipients outside the United States. There is an additional fee for using this authentication check.

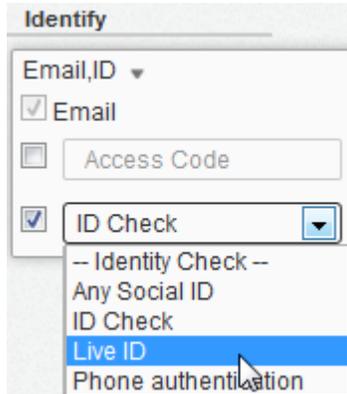
Note: If you select ID Check for a recipient, then the recipient name you supply is the one used for the ID check.

To enable the ID Check option, select the - **Identity Check** - check box and then select **ID Check** from the list.

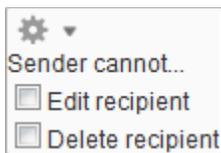


- **Live ID or Social ID Identity Check:** This option requires your recipient to enter their Live ID or Social ID (Salesforce, LinkedIn, Google, etc.) credentials before they can view the envelope.

To enable the Live ID or Social ID security option, select the - **Identity Check** - check box and then select **Live ID** or **Social ID** from the list.



4. Set Sender actions: Optionally, you can set the actions the template sender cannot take with the recipient role.



- **Edit recipient:** This option locks the recipient information preventing the template sender from changing the information for this recipient role.
 - **Delete recipient:** This option requires this recipient role to be part of any envelope sent with this template preventing the template sender from deleting this recipient role.
5. Repeat steps 1 through 4 to add additional recipient roles.
 - 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.
 6. After all roles and recipients are added, go to the Email Subject section.

Adding Email Message Information and Envelope Settings

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

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

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. Optionally, you can select the email language used for a recipient. This option sets the language used in the standard email format and initial signing view for the recipient, but it does not translate the Email Subject, Email Message text or note text. You must type the subject, message or note in the correct language.

Note: This option might not be enabled for your account. If you have questions about the options available for your account, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

- Click **Customize email and signing language for each recipient** the Customize Email Language dialog box appears.

- Select the language for each recipient and click **Done**. You are returned to the Prepare Envelope page and separate Email Subject, Email Message and Note fields are provided for each recipient.
 - For each recipient, type an **Email Subject** for the envelope. Optionally, type an Email Message and Note for the recipient.
5. Optionally, you can lock the email content (the Subject, Email Message and recipient Notes) of the template by selecting **Sender cannot edit Subject, Message, or Note**. This prevents senders from changing the content when they send an envelope with this template. When a sender uses a template with locked email content, they see the content, but cannot make any changes or additions to it.
- If the email content is locked and the template Subject is left blank, senders will be able to add a subject to the envelope.
- Locking the email content will also prevent users from making changes to the email content when correcting envelopes.
6. After the Email Message information is added, scroll down go to the Envelope Settings section.
7. The Envelope Settings section lets you set branding options, recipient options, reminders and expirations, and sender settings for the template.

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

This section provides information about the different options in the Envelope Settings section.

Envelope Settings

Branding

Select a brand for your recipients

GenWatt

Don't allow sender to change selected Brand

Recipient Information

Allow recipient(s) to sign on paper.

Allow recipient(s) to edit the document(s).

Allow recipient(s) to change signing responsibility.

Turn on auto navigation.

Must be a signer to view signed documents.

Reminders and Expirations

Envelope will expire on Tuesday, May 28, 2013.

Signer will not be sent any reminders.

Reminders Enabled

Send a reminder email to the signer in day(s).

After the first reminder, send a reminder every day(s).

Expire envelope in day(s).

Warn signer of envelope expiration day(s) before it will expire.

Sender Settings

Stamp documents with envelope ID.

Branding Setting

If your account has Branding enabled and you have access to multiple brand profiles, you can select the account brand that is seen by recipients during viewing and signing. Additionally, you can prevent users from changing the brand profile used when sending an envelope with this template by selecting **Don't allow sender to change selected Brand**.

Recipient Information Settings

The following options might be available for your account:

- **Allow recipient(s) to sign on paper:** Select this option to allow signers to print and sign the document on paper instead of electronically. See [Allowing Your Recipients to Sign On Paper](#) for more information about this.
- **Allow recipient(s) to edit the document(s):** Select this option to enable the Document Markup feature, which allows recipients to access the markup tool. The markup tool is used to cover up old text, cover text and add new text, or to add new text. Recipients that signed a document before the markup tool changes are made are given a new opportunity to review and approve the changes before any document is finalized. See [Using the Document Markup Feature](#) for more information about Document Markup.
- **Allow recipient(s) to change signing responsibility:** Select this option to allow the recipient to reassign the envelope to another person.
- **Turn on auto navigation:** Select this option to turn on auto navigation for the envelope. If this is not selected, there is no auto navigation in the envelope.
- **Must be a signer to view signed documents:** When this option is selected, recipients will only be able to see documents that have Signature or Initial tags assigned to them or that do not have any Signature or Initial tags.

Reminders and Expirations Settings

Optionally, you define rules to remind your recipients of their signing tasks and to expire your envelope if it is not signed.

Sender Settings

This section lets you select to stamp the envelope ID on the documents in the envelope and has the active Envelope Custom Fields for your account.

When you are done changing any Envelope Settings, click **Next** to begin tagging the documents.

Adding Tags

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. On the Add Tags page, select recipient/role in the **Roles** line or **Tag for:** list and then click and drag a tag from the palette and drop it on the document. See the [DocuSign Tag Information](#) section for more information about tags and tag properties.

Use the Tagging Toolbar to edit your envelope settings, documents and tags. The Tagging Toolbar is on the upper-portion of the page, below the message field. See [Working with the Tagging Toolbar](#) for more information about the toolbar.

Note: When adding tags, you can open the properties for the tag and select **Required** or **Locked** to require or lock the tags. Locked tags cannot be removed when a sender opens the template.

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 web application.

Note: If Document Visibility is enabled for your account, you can set the visibility options for the template. See [Using Document Visibility in a Template](#) for more information.

2. Continue placing tags for this recipient until you have added all the needed tags.
3. Repeat steps 1 and 2 for each recipient/role in the document.

Previewing and Saving the Template

1. Optionally, 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** to return to the Add Tags page.
2. When you have added all the needed tags and are done previewing the envelope, click **Save**. The template is saved and you are returned to the Classic DocuSign Experience Manage tab.

Editing a Template

Editing a template is similar to creating a template.

1. With the **Manage** navigation tab selected, in the **Templates** section of the navigation panel, click the **My Templates** folder.
2. Find and select the template you want to edit.
3. Click **Actions** and then select **Open**.
The template is opened for editing.
4. Follow the steps for [creating a template](#), changing or adding information as needed.
5. When you have made all the needed changes, click **Save** to save the modified template.

Downloading and Uploading Templates

In addition to creating and editing templates, you can download and upload template files to your DocuSign account. Templates are saved as .xml files.

Downloading Template Files

Use the following procedure to download templates from your DocuSign account to your computer or network.

1. With the **Manage** navigation tab selected, in the **Templates** section of the navigation panel, click the **My Templates** or **Shared Templates** folder.
2. Find the template or templates you want to download and select the template(s).

3. Click **Actions** and then select **Download Template(s)**.

Note: Individual templates are saved as .xml files. If you download multiple templates, they are saved in a zipped file.

4. The selected templates are saved to your system.

Uploading Template Files

Use the following procedure to upload a template file or zipped template file to your account.

1. With the **Manage** navigation tab selected, in the **Templates** section of the navigation panel, click the **My Templates** or **Shared Templates** folder. This is the folder where the uploaded template is saved.
2. Click **Actions** and then select **Upload Template(s)**.



3. Click the **Browse** button, locate the file on your computer or network and click **Open** or type the file location and name in the **Upload Template** field.

You can upload individual .xml files or zipped files to the templates folder. If you are uploading a zipped file, the system automatically unzips and loads the individual .xml file.

4. The system uploads the template(s).

If an uploaded template has the same name as an existing template, the name of the uploaded template has a number in parenthesis added to the template name.

Using Templates

The process for using a template to create and send an envelope is similar to the normal process for creating and sending a new envelope.

IMPORTANT: When creating a template, you need to be aware of the Data Population Scope setting for your account. If the account setting is **Envelope**, DocuSign tags with the same Label will populate with the same data when a recipient enters or modifies information in the tag for all documents in the template. If the account setting is **Document**, only DocuSign tags with the same Label and in the same document will populate with the same data when a recipient enters or modifies information in the tag.

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



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

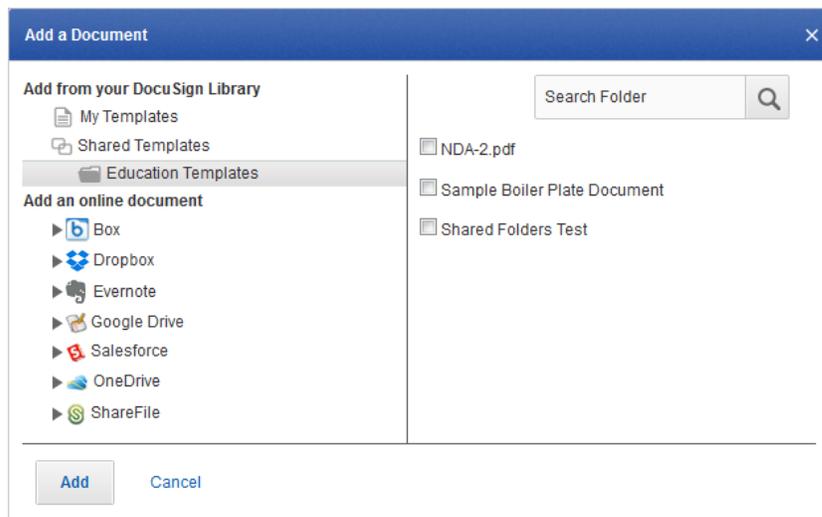
Note: You can save an envelope as a draft by clicking **Save Draft** at the bottom of the page. The saved envelope is placed in the Draft folder. You can exit the page without saving the envelope by clicking **Discard Changes** at the bottom of the page.

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

2. Select the source of your document:



- **To upload a Template:** click **Choose an Online Document**, the Add a Document dialog box is displayed. Select the location of the Template on the left side of the dialog box (Templates or Shared Templates). Select the Template on the right and then click **Add**. The document(s) in the template is added to the envelope and a thumbnail image of the document is added to the section.



3. Alternately, you can click **Browse from my Computer** to upload a document from your computer and, 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.

Also, after adding a document, you can 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.

4. Repeat Step 2 or 3 to add another document to the envelope.

Important: When you add or apply a template to an envelope and the template has a locked email subject and message (the **Sender cannot edit Subject, Message, or Note** checkbox is selected in the template), that subject and message is used for the envelope and cannot be

changed even if another locked template is subsequently added or applied to the envelope. If you entered an email subject or message before adding or applying a locked template, a warning message saying that the email subject and message will be overwritten with the email subject and message from the locked template is shown.

5. 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.
 - 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.
6. After all documents are added, go to the Recipients section to add envelope recipients.

Recipients and Routing

In the Recipients and Routing section you add recipients and, optionally, set the routing order and add identification methods. If the template you selected uses a bulk recipient file, you can review the bulk recipients and upload a new bulk recipient file. See [Sending a Template with Bulk Recipients](#) for more information.

1. When sending from a template, placeholders for the recipients have already been added to the envelope. Replace the placeholder recipient Email and Role Name information with the Email and Name of your recipient.

Note: If the template uses an Access Code, Phone Authentication or ID Check Identify option for placeholder recipients, you should review the information to ensure it is correct for the recipient.

Order	Email	Name	Action	Identify
☰ 1	<input type="text"/>	<input type="text" value="Applicant (required)"/>	Sign ▼	Email ▼ ✕
☰ 2	<input type="text" value="steve.anderson_ds@yahoo.com"/>	<input type="text" value="Steve Anderson"/>	Sign ▼	Email ▼ ✕

2. You can add additional recipients by typing 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

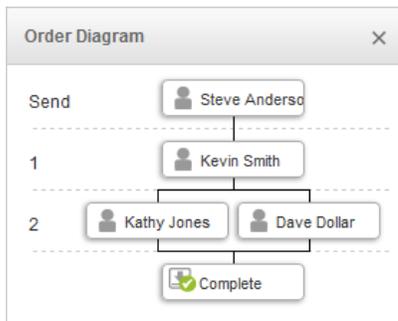
Recipient Email [Add Me](#)

Recipient Name

3. You can change the Actions and Identify options for any recipients you add.

Note: Depending on the settings the template creator used for the recipient role, you might be able to change the Actions and Identify options for those recipients.

4. Repeat steps 1 through 3 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.
 - You can see a graphical representation of the routing order for your recipients by clicking the **Order Diagram** link.



5. After all recipients are added, go to the Email Subject section.

Adding Messages

In the Email Message section you can customize the email subject and, optionally, the messages for recipients. This information is usually already entered by the template creator, but you can modify this information as needed.

Email Message

Subject to **All Recipients**

Please DocuSign this document: New Account

Email Message to **All Recipients** (Characters Used: 0/2000)

[Customize email language for each recipient](#)

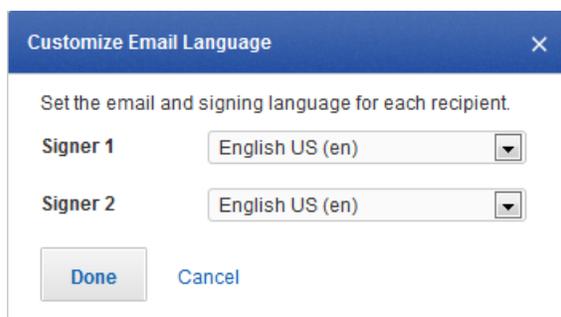
Add a Note to Add

1. Optionally, Type an **Email Subject** for the envelope and an **Email Message** for all recipients. The subject is limited to 100 characters and the message is limited to 2000 characters.
2. 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.
3. Optionally, you can select the email language used for a recipient. This option sets the language used in the standard email format and initial signing view for the recipient, but it does not translate the Email Subject, Email Message text or note text. You must type the subject, message or note in the correct language.

Note: This option might not be enabled for your account. If you have questions about the options available for your account, contact your Account Manager or DocuSign Support (support@docusign.com) for assistance.

- Click **Customize email and signing language for each recipient** the Customize Email Language dialog box appears.



- Select the language for each recipient and click **Done**. You are returned to the Prepare Envelope page and separate Email Subject, Email Message and Note fields are provided for each recipient.
 - For each recipient, type an **Email Subject** for the envelope. Optionally, type an Email Message and Note for the recipient.
4. After the Email Subject is added, you can optionally go to the Envelope Settings section.
- If you are not changing any Envelope Settings, you can:
- Click **Continue** to review or add tags in the documents.
 - Click **Send Now** to send the envelope.

Envelope Settings

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

Note: If the person that created the template locked the template brand when creating the template, the brand cannot be changed.

When you are done changing any Envelope Settings, you can:

- Click **Continue** to review or add tags in the documents.
- Click **Send Now** to send the envelope.

Reviewing Tag Placement

The tags are usually placed by the template creator, but you can modify these and add new tags if needed.

1. To assign a signature, initial or other tag to a recipient, click on the recipient's name on the left side of the page and the Tag Palette is shown below the recipient's name.

Click and drag a tag from the palette and drop it on the document. For more information about tags and how to change tag properties, refer to the [DocuSign Tag Information](#) section.

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 document.

Previewing and Sending an Envelope

1. Optionally, 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** to return to the Add Tags page.

2. When you have added all the needed tags and are done previewing the envelope, click the **Send** button. The envelope is sent and you are returned to the Classic DocuSign Experience Manage tab.

Template Matching and Intelligent Document Recognition

When a sender starts a new envelope and adds a document, Intelligent Document Recognition (IDR) reviews the text and information in the document to determine if the document matches a saved template. If a match is found, the system will ask the sender if they want to apply the template to the document in the envelope.

IDR looks at the following factors to determine if there is a match between a document and a template:

- the number of pages in the template is equal to or less than the number of pages in the document,
- the first and last 25 words in the document are the same as the template or, if IDR region match boxes are used in a template, the words in document are the same as those in the IDR regions.

In the case where a template document has similar opening and closing text to many other documents used by a group, you can add an IDR region match box to the template to narrow down and improve the IDR selection process.

You can select any region of text within a document for IDR. There is no functional limit to the maximum or minimum volume of text you can select to define a match. However, the less text you select the more false positive matches IDR is likely to find and the more text you select, the longer it will take for the IDR matching process to finish.

Setting Intelligent Document Recognition Regions

1. Before saving a template, on the Tag toolbar click the IDR Regions button. 

- Place your cursor near the text you want to use and then left-click and drag the cursor over the portion of text to match when DocuSign applies IDR. A dashed line appears around the selected text.

If the area selected is not the area you wanted:

- To adjust the size of the region, place your cursor over the lower right corner of the region (the cursor turns into a double-headed arrow), click and drag the region to set the correct area.
- To move the region, place your cursor over the region (the cursor turns into a four-headed arrow), left-click and drag the region to a new area.
- To remove the region, place your cursor over the region (the cursor turns into a four-headed arrow), left-click and drag the region over the DocuSign Tags (the right side of the page) and release the mouse button.

- Complete and save the template normally.

Automatic Template Matching Settings

When automatic template matching is enabled for a user and the user adds a document to an envelope, DocuSign automatically checks to see if the document matches an existing template.

Account templates will be in one of three Auto-Match states, which determines how they are used during automatic template matching. This limits the number of templates the system searches through before recommending or applying a template to an envelope.

The template Auto-Match states and the icons associated with those states are:

-  **Try to Auto-Match:** This template was created or used within the past 120 days and will be checked for automatic template matching.
-  **No Auto-Match:** This template has not been used in the past 120 days and will not be checked for automatic template matching.
-  **Always Try Auto-Match:** This template will always be checked for automatic template matching.

When viewing templates in the Classic DocuSign Experience Manage tab, the current template Auto-Match state is shown in the Auto-Match column.

Shared	Auto-Match	Name	From
		NDA-2.pdf	Steve Anderson
		Shared Folders Test	Steve Anderson
		Sample Boiler Plate Document	Steve Anderson

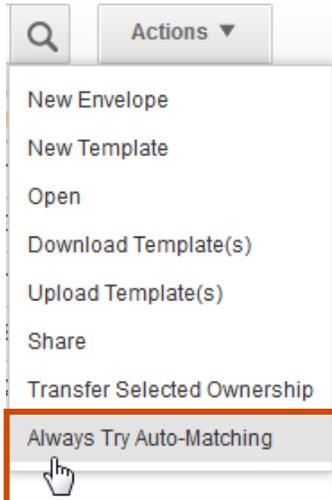
Templates that have not been used within the past 120 days are changed to a **No Auto-Match** state and are not checked for template matching.

Important: A template that has not been used for the past 120 days still remains in the system (it is not deleted), it is just not included in the template matching search.

Template creators and account administrators have the ability to set the **Always Try Auto-Match** option for templates. This prevents the template from being changed to a **No Auto-Match** state and can be done for a template currently in a **Try to Auto-Match** or **No Auto-Match** state.

To set the **Always Try Auto-Match** option:

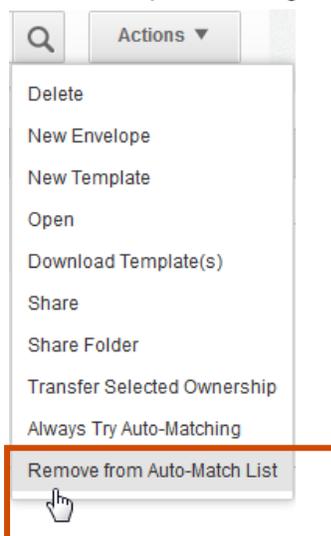
- In the Manage tab, find and select the template that should always try to be automatically matched.
- In the Actions menu (or the menu for the row), select **Always Try Auto-Matching**. The icon for the template changes to the **Always Try Auto-Match** icon.



Alternately, if there are templates that should not be included in the automatic template matching check, template creators and account administrators can set those templates to the **No Auto-Match** state, even if the template has been used in the previous 120 days. This can be done for a template in a **Try to Auto-Match** or **Always Try Auto-Match** state.

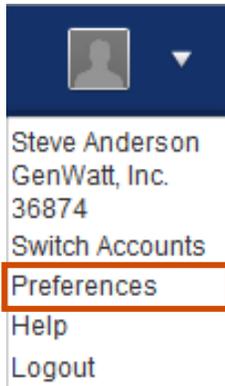
To set the **No Auto-Match** option:

- In the Manage tab, find and select the template that should be excluded from automatic matching.
- In the Actions menu (or the menu for the row), select **Remove from Auto-Match List**. The icon for the template changes to the **No Auto-Match** icon.



User Account Preferences

This section describes the Preference options available to DocuSign users. More options might be available to a user, depending on the Permission settings for their account. Account preferences available to customer administrators are covered in another guide.



From the Classic DocuSign Experience, click your profile image in the upper right and select **Preferences**.

Select to view your Preferences

The Preferences page is displayed.

Click a navigation tab (Home, Manage, Send or Dashboards) to return to that tab.

For information about the options available to customer administrators, see the *Account Administration Reference Guide* on the DocuSign website.

Member Profile Section

The Member Profile section lets you view and manage your profile information. This section has the following options:

Connected Apps – This function is associated with DocuSign's REST API authentication. If you are not directly using DocuSign's REST API, you can ignore this option. It is used to revoke

authentication tokens for your account. Refer to the DocuSign REST API Guide for more information.

Names Available – Set if senders can add new spellings for your name

Note: Depending on the settings for your account, this function might use the heading **Merge Users** instead of **Names Available**.

Manage Identity - View and update your signature, DocuSign ID card information and upload an ID card photo.

Electronic Notary Public – Add and edit electronic notary credential information and view and export Notary Journal information.

Manage Email Notifications – View and update the email notifications you receive from DocuSign.

Social ID Login – If your account allows you to log in to DocuSign with social accounts, this section lets you set your credentials.

Time Zone – Select the Time Zone used when you sign documents and Date Format used in your web application. This option is only available if your account manager allows you to set a unique time zone.

Change Password – Edit your password and security question.

Change Email – Update your email address.

The information in each option and procedures for updating those options are provided below.

Names Available

This section lets you set whether users can add new spellings of your name. In the navigation bar on the left side of the page, under the Member Profile heading, click **Names Available**.

Note: Depending on the settings for your account, this function might use the heading **Merge Users** instead of **Names Available**.

Under the Names Available to Senders heading, select **Senders may add new spellings of my name** if:

- you will allow new spellings of your name for business and legal purposes AND
- you will share this email address with other people.

Click **Done** to return to the Account Preferences.

Manage Identity

This section explains how to view and modify your DocuSign ID card, and view and modify your adopted signature and add a new signature.

In the navigation bar on the left side of the page, under the Member Profile heading, click **Manage Identity**, your DocuSign ID card is displayed.

Manage Identity
 Your DocuSign identity makes your electronic signature more secure. When a user clicks on your signature in a document you signed using DocuSign, the user will see your DocuSign ID Card if your privacy settings have been configured to display your DocuSign ID Card.
 Information saved.

Callout 1: Click here to upload a profile image for your ID Card (points to 'Add Photo')

Callout 2: Click here to change your ID Card privacy settings (points to 'Privacy Settings')

Callout 3: Click here to add a new signature, upload a signature, modify your signature or delete a signature. (points to 'Edit' link next to signature)

Callout 4: Click here to modify your ID Card personal information settings. (points to 'Edit' link at the bottom)

Profile Information:
 Dave Dollar
 dave.dollar@ymail.com
 DocuSigned by: Dave Dollar
 22F8F23D41D849E...

Signed:
 2 envelopes
 7/26/2012 last signed

Company:
 Finance
 GenWatt, Inc.
 2068658888
 12 Median Way
 Austin, TN 98989
 United States

Authentication:
 1 method
 11/28/2011 last authenticated
 Access Code last authentication

To edit your Privacy Settings:

- Click the **Privacy Settings** link to go to the Privacy Settings page.

Privacy Settings
 Edit your DocuSign ID Card privacy settings below.

ID Card Display Settings

- Show my DocuSign ID Card
- Display Company/Title
- Display Address/Phone
- Display Usage History

Save Settings **Back**

- Select the information you want to show in your ID card.
- Click **Save Settings**. Your information is saved and you are returned to the ID Card.

To edit a signature, upload a signature, modify or delete a signature:

- Click the **Edit** link by your signature to go the modify signature page.

Name	Signature	Initials	
Dave Dollar	DocuSigned by:  22F8F23D410849E...	DS 	Edit Delete
David Doller	DocuSigned by:  22F8F23D410849E...	DS 	Edit Delete
New			
Done			

- To modify your signature and initials, click the **Edit** link adjacent to the signature you want to modify, or to add a new signature or initials style, click the **New** link.

- Selecting your signature style:

If you clicked the **New** link, type your name and initials for the new signature in the **Name** and **Initials** fields.

Select style for your signature and initials and click **Adopt**. The new or modified signature and initial style is saved.

- Drawing your signature:

If your browser is HTML5 capable, you can click **Draw**, at the top of the page, to draw your custom signature.

Tip: You can use the DocuSign mobile app on a tablet or other mobile device to draw your signature using a stylus or just your finger. This is an easy way to capture your own unique signature and use it to DocuSign.

If you clicked the **New** link, type your name and initials for the new signature in the **Name** and **Initials** fields.

In the **Draw your signature** or **Draw your Initials** block draw your signature/initials using your finger or stylus (for a touch-screen) or mouse.

If you make a mistake, click **Clear** to reset the block.

Click **Adopt** to save the save your signature and initials.

You can return to the pre-set signature styles by clicking **Select Style**.

- Uploading your signature:

Note: The upload signature option supports common image files (.jpg, .png, .tiff) with a maximum file size of 200kb. For signature and initials images, the image height should be 145 pixels. The width of the image varies depending on the length of the person's name. The maximum width for signatures is 400 pixels and 150 pixels for initials.

Click **Upload**, at the top of the page, to upload your signature.

If you clicked the **New** link, type your name and initials for the new signature in the **Name** and **Initials** fields.

Click **Browse...** the File Upload dialog box appears. Find the signature file you want to upload, select the file and click **Open**. The signature file is uploaded.

Click **Browse...** the File Upload dialog box appears. Find the initial file you want to upload, select the file and click **Open**. The initial file is uploaded.

Click **Adopt** to save the save your signature and initials.

- Click **Done** to return to your ID card.

To upload an image to your DocuSign ID card:

- Click **Add Photo** to go the upload profile image page.



Upload your DocuSign ID Card profile image.

Profile Image

maximum display size = 79 x 79 (pixels)

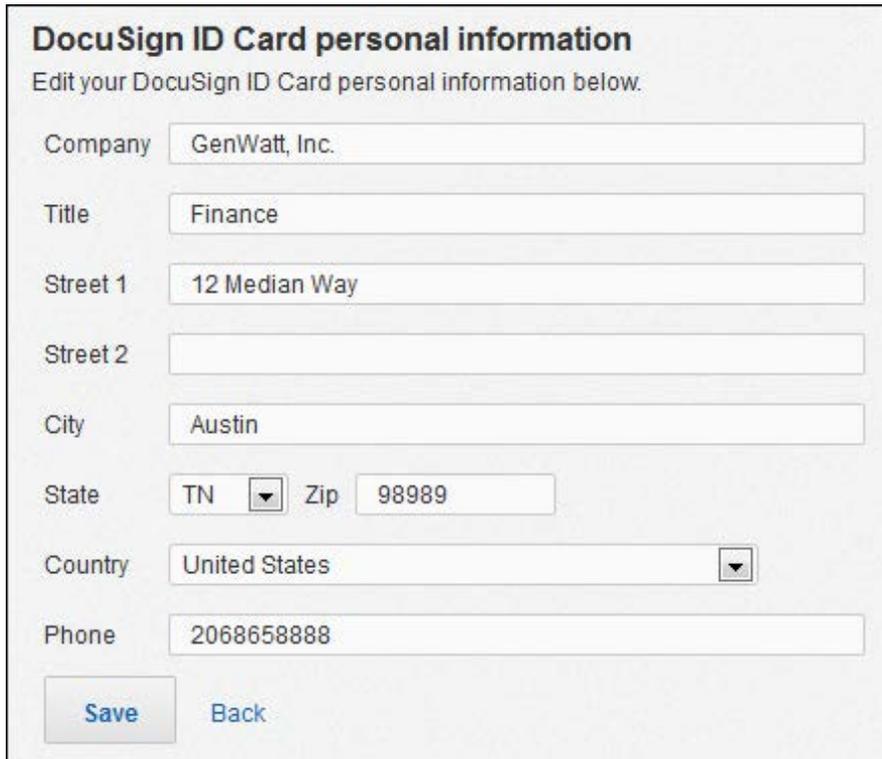
- Click **Browse...** the File Upload dialog box appears. Find the image you want to upload, select the file and click **Open**.

Note: The maximum display size for the image is 79 pixels wide and high; this is also the recommended size for the image.

- Click **Upload Photo**. The photo file is uploaded and you are returned to your ID card.

To edit your ID Card Personal Information:

- Click the **Edit** link by your signature to display your personal information.



The screenshot shows a form titled "DocuSign ID Card personal information" with the instruction "Edit your DocuSign ID Card personal information below." The form contains the following fields:

- Company: GenWatt, Inc.
- Title: Finance
- Street 1: 12 Median Way
- Street 2: (empty)
- City: Austin
- State: TN (dropdown menu)
- Zip: 98989
- Country: United States (dropdown menu)
- Phone: 2068658888

At the bottom of the form are two buttons: "Save" and "Back".

- Type your personal information into the appropriate fields.
- Click **Save**. Your information is saved and you are returned to your ID card.

Your DocuSign ID Card

The DocuSign ID Card provides identification assurance to your DocuSign network. The DocuSign ID Card can be accessed from your signed documents and the DocuSign audit trail.

A signer's DocuSign ID card can be accessed:

- When viewing a document with a signature by moving the mouse over the signature.
- When viewing an envelope's history by moving the mouse over a recipient names in the Envelope Data section.

The DocuSign ID card shows the owner's profile image (if uploaded), name, email address and signature. If the signer has enabled usage statistics (the number of envelopes and documents signed), the date the document was signed, the signing location.

The signing location is the location where the signer signed the document. This information can be retrieved by clicking the **Signed in Location** link; a new browser window will open showing the location.

You can modify your ID card by adding an image and you can update your personal information (company, title, address and phone number) from the ID card.

Electronic Notary Public Information

This section provides information for Notaries on how to add their electronic notary information to their DocuSign account, how to edit their notary information and how to use the Notary Journal.

Electronic Notary Requirements and Limitations

The following requirements and limitations apply to adding your credentials to your DocuSign account and acting as a notary:

- For this release, electronic Notaries cannot complete registration in their DocuSign account unless they are a commissioned and active Electronic Notary in the State of North Carolina. Please see <http://www.secretary.state.nc.us/enotary/> for more details.
- You must have a DocuSign account. This can be any type of account, even a free Personal plan.
- You cannot use a pre-generated signature for your member profile. You must draw or upload your signature to your account.
- If a credible witness is used during a signing session, the browser used for signing must be HTML5 compatible.
- You will not receive a copy of the completed notarized documents and cannot open completed documents from the Classic DocuSign Experience. Information about the signing session is automatically added to your Notary Journal.

Adding Electronic Notary Credentials to Your Account

To add your electronic notary credentials to your member profile:

Note: To use your notary credentials, you must use a drawn or uploaded signature in your Identity.

1. From the Classic DocuSign Experience, click your profile image in the upper right and select **Preferences**.
2. Under Member Profile heading, click **Electronic Notary Public**. Click **Register** to add your electronic notary information.

The Electronic Notary Profile page appears. This page shows the contact information that is sent to signers, your notary jurisdiction information and your notary journal. To change your contact information you need to edit your DocuSign Personal Information and Address.

Electronic Notary Profile

This is the your contact information that will be given to signers needing a Notary. If you need to make any changes to it, click on the 'Personal Info' link in the member profile section.

Name	Steve Anderson
Address	12 Median Way Austin TN 98989
Phone Number	2068658888
Email Address	steve.anderson_ds@yahoo.com

Jurisdictions

Currently supporting only North Carolina notaries

County	Registered Name	Commission Id	Expiration Date	Notary Seal	Action
<input type="button" value="Add Jurisdiction"/>					

3. Click **Add Jurisdiction**.

Add Jurisdiction

Select Jurisdiction

Commission Id

County Name

Registered Name

Commission Expiration Date

Validating causes your notary seal and DocuSign signature to be submitted to the selected jurisdiction. Please return and re-validate if you update those items.

4. Select your **Jurisdiction** and type your **Commission Id**.

Important: The use of electronic notary is currently limited to the state of North Carolina. North Carolina is the only Jurisdiction that can be selected.

5. Click **Validate Credentials**. DocuSign checks your credentials against North Carolina's electronic database to verify the electronic notary is commissioned and active in the North Carolina electronic notary database. Valid credentials are added to the Jurisdictions list. After your credentials are successfully added, DocuSign attaches a notary icon under your signature on your DocuSign ID card.

Editing Your Electronic Notary Credential information

To edit your electronic notary credential information:

1. From the Classic DocuSign Experience, click your profile image in the upper right and select **Preferences**.
2. Under Member Profile heading, click **Electronic Notary Public**. The Electronic Notary Profile page appears. This page shows the contact information that is sent to signers, your notary jurisdiction information and your notary journal.
3. Find the credentials you want to modify and click **Edit**. You can delete credentials by clicking **Delete**.
4. Select your **Jurisdiction** and type your **Commission Id**.

Important: The use of electronic notary is currently limited to the state of North Carolina. North Carolina is the only Jurisdiction that can be selected.

5. Click **Validate Credentials**. DocuSign checks your credentials against North Carolina's electronic database to verify the electronic notary is commissioned and active in the North Carolina electronic notary database. Valid credentials are added to the Jurisdictions list.

The Notary Journal

The Notary Journal contains records of all electronic notary transactions you complete using DocuSign. When an electronic notary signing session is completed the information about the session is automatically added to your Notary Journal.

To locate your Notary Journal, from the Classic DocuSign Experience click your profile image in the upper right, select **Preferences** and then, under Member Profile heading, click **Electronic Notary Public**.

- You can search for specific signers or documents in your Journal by typing the information in the search field and clicking **Search**.
- You can print the information shown in your journal by clicking **Export Journal Data**. Your journal entries are exported to a PDF file that can be downloaded or printed.

Notary Journal

Enter the name of a signer or document that you wish to search for.

Date	Signer Name	Signature	Jurisdiction	Documents Signed
8/7/2013 11:05:23 AM	Kevin Smith	Signers signature	North Carolina	Notarized Documents
8/6/2013 5:43:02 PM	Kevin Smith	Signers signature	North Carolina	Notarized Documents

Display 5 items per page
Page 1 of 1

Managing Your Email Notifications

The procedure explains how to view and update the email notifications you receive from DocuSign.

1. In the navigation bar on the left side of the page, under the Member Profile heading, click **Manage Email Notifications**.

The notification management page appears.

Manage your email notifications

Email notifications alert the user to an envelope action or information regarding an envelope. To control when you receive email notifications, toggle the settings below.

Notify me when:

I am a Signer:

- Select All
- I have an envelope to sign
- An envelope that I have signed is complete
- I have been designated to receive a copy of an envelope
- I have been asked to Acknowledge receipt of an envelope
- A fellow recipient has declined to sign an envelope
- An envelope has been voided by the sender
- An envelope has been corrected by the sender
- A signer has reassigned their envelope to me
- Documents inside an envelope will be purged from the system
- Your fax has been received
- Another signer has made changes that need my approval
- I represent signers and need to provide contact information

I am a Sender:

- Select All
- An envelope that I have sent is complete
- An envelope that I have sent has been assigned to a different signer
- A signer has declined to sign an envelope that I have sent
- A signer has withdrawn their consent to do business with me online
- An envelope that I have sent has been viewed
- An envelope has failed to be delivered to a recipient

2. Select or clear the checkboxes for the options when you want to receive an email.
3. Click **Save** to save the changes.
4. Click **Done** to return to the Preferences page.

Social ID Login

The procedure explains how to map a social account ID to your DocuSign account. This option is only available if your account manager allows you to use a Social ID login.

1. In the navigation bar on the left side of the page, under the Member Profile heading, click **Social ID Login**.

Social ID Configuration

Use another Social ID site to provide the credentials to log into your DocuSign account. Pick one of the sites listed below and follow the steps that they provide to allow DocuSign to link to your Social ID account.

If you change your Social ID Provider settings, such as User Name or Email Address, you will need to re-associate that account with your DocuSign membership.

Enable Social ID Login for my DocuSign membership.

Pick a social provider to map to your DocuSign account

Windows Live ID Google

Facebook LinkedIn

Salesforce Yahoo!

Twitter

Social Login by Janrain

Save Cancel

2. On the Social ID Configuration page:

- Select **Enable Social ID Login for my DocuSign membership**.
- Click on the social provider you want to use to log on to DocuSign with.
- A new browser window opens for the social provider. Enter your credentials and save the information to close the browser window.
- Click **Save** to save your log in information.

Time Zones

The procedure explains how to view and update your default time zone used when signing envelopes and set the date-time format used in your web application. This option is only available if your account manager allows you to set a unique time zone.

1. In the navigation bar on the left side of the page, under the Member Profile heading, click **Time Zone**.

The Time zone and date format configuration page appears.

Time zone and date format configuration - Dave Dollar

Set or change your default time zone display for signing envelopes. Also set or change your default date - time format when viewing the member console. The time zone functionality is only available for the current user interface.

My local time zone (UTC-08:00) Pacific Time (US & Canada)

Format my local date and time as 7/27/2012 3:42 PM PT

Save Cancel

2. Select the formats you want to use. Each option is discussed below:

My local time zone – This option selects the default time zone to be used in your web application.

Format my local date and time as – This option selects the format used in your web application. It also sets the format used when the user signs an envelope.

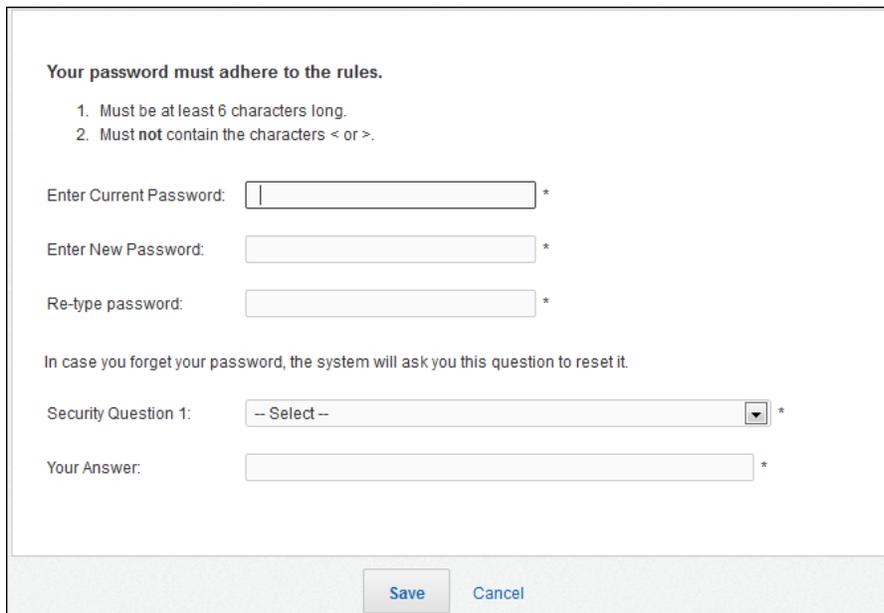
3. Click **Save** to save the changes.

Changing your Password

This procedure explains how to change your current password and add or update a security question to your account.

1. In the navigation bar on the left side of the page, under the Member Profile heading, click **Change Password**.

The password page appears.



The screenshot shows a web form for changing a password. At the top, it states "Your password must adhere to the rules." followed by two numbered rules: "1. Must be at least 6 characters long." and "2. Must not contain the characters < or >." Below the rules are three input fields: "Enter Current Password:" with a text box and an asterisk, "Enter New Password:" with a text box and an asterisk, and "Re-type password:" with a text box and an asterisk. Below these fields is a note: "In case you forget your password, the system will ask you this question to reset it." This is followed by "Security Question 1:" with a dropdown menu showing "-- Select --" and an asterisk, and "Your Answer:" with a text box and an asterisk. At the bottom of the form are two buttons: "Save" and "Cancel".

2. Type your current password, type your new password and then retype your new password.

Review the rules for your new password (in the example above the password must be at least six characters long and cannot contain the less than (<) or greater than (>) symbols). These rules can be set by your Customer Account Manager.

3. Select a security question and type the answer to that question.

The security question is used if you forget your password.

4. Click **Save**.

You are returned to the Account Preferences page.

Changing your Email

This procedure explains how to change the email address used for your account.

- In the navigation bar on the left side of the page, under the Member Profile heading, click **Change Email**.

The Account Email Address Change page appears.

Account Email Address Change

If you would like to change the email address assigned to your account, you may do so here. Since your email address is your login, and used centrally to identify you, the process of changing your email address will involve:

- Provide the new email address you want to use
- A message will be sent to your old email address as a notice of this change
- A message will be sent to your new email address with a hyperlink you must follow to complete the change.

New Email Address: *

[Next >>](#) [Cancel](#)

- Type your new email address.
- Click **Next**.

A message is sent to your old email address informing you about the change of email request. Another message is sent to your new email address with a link where you will confirm the email change.

Member Options Section

The Member Options section lets you view and manage your profile information. This section has three options:

Address Book - View and manage contact information in your address book

Custom Tags (SecureFields) - Create, edit, share, and delete custom tags

Template Matching - Manage settings for automatic recognition and application of templates

Managing your Address Book

This procedure explains how to view and manage your address book entries.

1. In the navigation bar on the left side of the page, under the Member Options heading, click **Address Book**.

The address book opens showing your personal contacts.

Selecting the **Show Details** option displays the Account (if any) associated with the contact and whether the contact is a shared contact.

- Adding a new contact:** To add a new contact, click **Add New**. The Edit address book item window appears. Type the contact information and click **Save** to add the new contact.

When adding contact telephone numbers – select the type of phone (Home, Work, Mobile, Other), select the Country Code for the phone number, type the phone number and, if the number has an extension, type the extension number.

Note: DocuSign does not validate the format of phone numbers entered into the Address Book.

When you go to the extension field after typing a Phone number, a new blank phone number line is added to the Address Book Item. An Address Book contact can have a maximum of 4 phone numbers associated with it.

A phone number can be deleted by clicking the red x (✖) adjacent to the telephone number.

- Finding a contact:** If you have a large number of contacts in your address book, there are several ways to search for a specific contact:

Address Book drop down list: This drop down list allows you to select from the address book, Personal Contacts, Shared Contacts or other address books, used to look for a contact.

Contact your account administrator if you think you should see more address books.

Find: This is a search function for the selected address book. Select the column you want to search in by clicking on the column header, type a search term into the **Find** field and click **Find**. Contacts that meet the search term are displayed in the list.

Sort: Click on a column header to sort your contacts by that column.

- 4. Sharing and Unsharing contacts:** You can share contacts from your Personal Contacts address book to the Shared Contacts address book and you can remove your contacts from the Shared Contacts address book. To share or remove a contact, find and select the contact you want to share with/remove from the Shared Contacts address book. Click **Share** to share the contact with or **Unshare** to remove the contact from the Shared Contacts address book.
- 5. Editing contact information:** You can edit the information of contacts in your Personal Contacts address book. To edit a contact, find and select the contact you want to edit and click **Edit**. The Edit address book item window appears. Type the new contact information and click **Save** to save the new contact information.
- 6. Deleting a contact:** You can delete contacts from your Personal Contacts address book. To delete a contact, find and select the contact you want to delete and click **Remove**. The system will ask you to confirm that you want to remove the contact from your Personal Contacts address book, click **OK** to remove the contact.
- 7.** When you are done managing your address book, click **Close** to close the book and return to the last page you were viewing.

Managing Custom Tags

This section is used to manage your Custom Tags.

See [Creating Custom Tags](#) for more information and details about creating and using custom tags.

Managing Template Matching

When a sender starts a new envelope and adds a document, if Intelligent Document Recognition (IDR) is enabled, the service reviews the text and information in the document to determine if the document matches a saved template.

In general, IDR looks at the following factors to determine if there is a match between a document and a template:

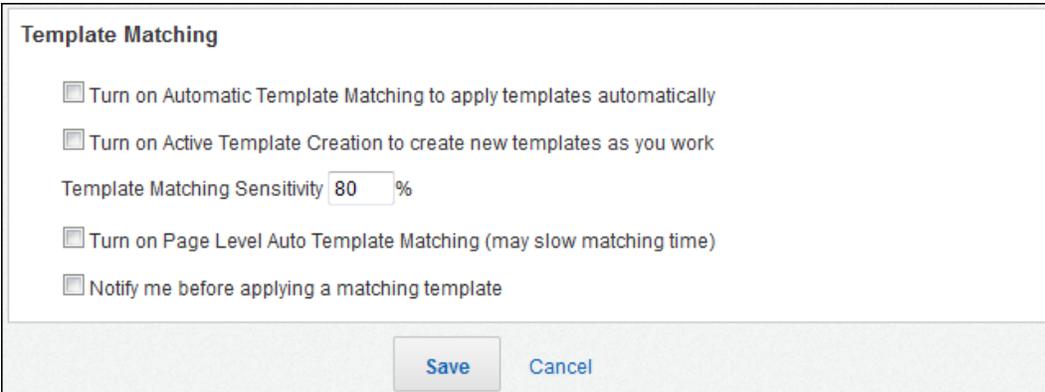
- the number of pages in the template is equal to or less than the number of pages in the document,
- the first and last 25 words in the document are the same as the template or, if IDR region match boxes are used in a template, the words in document are the same as those in the IDR regions.

Note: IDR region match boxes can be set when a template is created. For more information and details about setting IDR match regions, see [Intelligence Document Recognition](#).

This procedure explains how to view and manage your IDR settings.

- 1.** In the navigation bar on the left side of the page, under the Member Options heading, click **Template Matching**.

The Template Matching settings page appears.



The screenshot shows a dialog box titled "Template Matching". It contains five checkboxes and a text input field. The first checkbox is "Turn on Automatic Template Matching to apply templates automatically". The second checkbox is "Turn on Active Template Creation to create new templates as you work". The text input field is labeled "Template Matching Sensitivity" and contains the value "80" followed by a percent sign. The third checkbox is "Turn on Page Level Auto Template Matching (may slow matching time)". The fourth checkbox is "Notify me before applying a matching template". At the bottom of the dialog box, there are two buttons: "Save" and "Cancel".

2. Select the settings you want to use. Each option is discussed below:

Turn on Automatic Template Matching to apply templates automatically: If this option is selected, when you add a document to a DocuSign envelope the service will check the document to see if it matches with an existing template. If the document matches a template, the system will apply the template to the document unless the **Notify me before applying a matching template** option (see below) is selected, in which case the service will ask if you want to apply the template.

Turn on Active Template Creation to create new templates as you work: If this option is selected, after you complete an envelope that did not use a template you will have the option to save the document as a template.

Template Matching Sensitivity: This option sets the matching sensitivity for template matching. The higher the sensitivity setting, the closer the document and template match must be.

Turn on Page Level Auto Template Matching: If this option is selected, instead of only checking the number of pages and first and last 25 word of a document, the service will check each page of a document with a template to search for a match.

Notify me before applying a matching template: If this option is selected and the service finds a matching template, the service will ask if you want to apply the template to the document.

3. Click **Save** to save the settings.

You are returned to the Account Preferences page.

Account Administration Section

The Account Administration section lets you view envelope reports and the Terms of Use information. This section has two options:

Envelope Publish - Publish envelope information from your account to CSV and XML files.

API - This section shows if API access for your account is enabled, provides information about your Integrator's Key, and example API information. Click **Done** to return to the Account Preference page.

Envelope Publish

1. In the navigation bar on the left side of the page, under the Account Administrations heading, click **Envelope Publish**.

The Envelope Publish page appears with the search criteria shown at the top of the page.



The screenshot shows a search form for envelope reports. It includes the following fields and options:

- For Account:** GenWatt, Inc. (dropdown)
- For Sender:** Dave Dollar (dropdown)
- From:** 7/1/2012 (calendar icon)
- To:** 7/27/2012 (calendar icon)
- Envelope Status:** All Sent/Finished (dropdown)
- Recipient:** (text input)
- Subject:** (text input)
- Show Recipient Information:** (checkbox)
- Show Custom Fields:** (checkbox)
- Buttons:** View, Cancel

2. Enter the selection criteria for the envelope report:

Note: Typically users do not have more than one account or access to envelope reports for other senders.

- Type or select the date range for the search.
- Select the **Envelope Status** for the search.
- You can type **Recipient** and/or **Subject** information to further limit the search.
- Select **Show Recipient Information** to display the recipient names and email address for the envelopes that meet the search criteria.
- Select **Show Custom Fields** to display envelope custom fields for the envelopes.

3. Click **Generate**.

The envelope report for the entered search criteria appears.

- The default view shows 20 envelopes per page in the report. You can display 20, 50 or 100 envelopes per page by selecting the appropriate option.
- You can sort the data in the envelope report by clicking on the column heading for the column you want to sort.
- Optionally, select **Apply DocuSign Connect settings** to apply Connect settings to the output.
- Optionally, select **Publish XML** for all or some envelopes to add XML information for other applications.
- You can save or view the information as a comma separated value (.CSV) or XML file by clicking **Save data as .CSV file** or **Publish XML**.
- You can print the report using your browser's print feature.



The Global Standard for eSignature