



Sending Documents with DocuSign

Sending Envelopes	Steps
Step 1: Upload your document	<ol style="list-style-type: none">1. From your DocuSign Account, click NEW, then click Send an Envelope.2. Click UPLOAD A FILE to upload a document from your computer.
Step 2: Add the recipient	<ol style="list-style-type: none">1. Enter the recipient's name and email address. Click the drop-down NEEDS TO SIGN option to identify the action the recipient will take. <p>Reminder: You are unable to send envelopes to alias email accounts.</p>
Step 3: Add the email subject and message	<ol style="list-style-type: none">1. Complete the MESSAGE fields. Click NEXT
Step 4: Add signing fields	<ol style="list-style-type: none">1. Verify the recipient's name appears in Recipient's List box for proper routing.2. From the Fields Palette, click and drag all fields you require directly into the document where the recipient will place their information.
Step 5: Preview and send your document	<p>When you finished adding documents, recipients, messages, and signing fields, you are ready to preview your work and send your envelope.</p> <ul style="list-style-type: none">● To save a draft without sending, click ACTIONS and select SAVE AND CLOSE.● To cancel the envelope preparation and return to your Manage page, click ACTIONS and select DISCARD.● To preview your recipients' experience, click RECIPIENT PREVIEW.● To send your envelope, click SEND.



Sending Documents with DocuSign

Creating New Templates	Steps
Step 1: Upload your document	<ol style="list-style-type: none">1. From your DocuSign Account, click NEW, then click Send an Envelope.2. Click UPLOAD A FILE to upload a document from your computer, or click GET FROM CLOUD to upload a document from an online location.
Step 2: Add the recipient	<ol style="list-style-type: none">1. Enter the recipient's name and email address. Click the drop-down NEEDS TO SIGN option to identify the action the recipient will take.
Step 3: Add the email subject and message	<ol style="list-style-type: none">1. Complete the MESSAGE fields. Click NEXT
Step 4: Add signing fields	<ol style="list-style-type: none">1. Verify the recipient's name appears in Recipient's List box for proper routing.2. From the Fields Palette, click and drag all fields you require directly into the document where the recipient will place their information.3. Change the document view and add fields by selecting each individual page under DOCUMENTS.
Step 5: Preview and send your document	<p>When you finished adding documents, recipients, messages, and signing fields, you are ready to preview your work and send your envelope.</p> <ul style="list-style-type: none">● To save a draft without sending, click ACTIONS and select SAVE AND CLOSE.● To cancel the envelope preparation and return to your Manage page, click ACTIONS and select DISCARD.● To preview your recipients' experience, click RECIPIENT PREVIEW.● To send your envelope, click SEND.
Step 6: Save your signature	<ol style="list-style-type: none">1. Click ADOPT AND SIGN to adopt and save your signature information.2. You'll be returned to the document.
Step 7: Confirm signing	<ol style="list-style-type: none">1. When you finish clicking all signature tags in the document, confirm signing by clicking FINISH.



Sending Documents with DocuSign

Using Existing Templates	Steps
Step 1: Upload your document	<ol style="list-style-type: none">1. From your DocuSign Account, click NEW, then click Send an Envelope.2. Click UPLOAD A FILE to upload a document from your computer, or click GET FROM CLOUD to upload a document from an online location.
Step 2: Add the recipient	<ol style="list-style-type: none">1. Enter the recipient's name and email address.2. Click the drop-down NEEDS TO SIGN option to identify the action the recipient will take.
Step 3: Add the email subject and message	<ol style="list-style-type: none">1. Complete the MESSAGE fields.2. Click NEXT.
Step 4: Add signing fields	<ol style="list-style-type: none">1. Verify the recipient's name appears in Recipient's List box for proper routing.2. From the Fields Palette, click and drag all fields you require directly into the document where the recipient will place their information.3. Change the document view and add fields by selecting each individual page under DOCUMENTS.
Step 5: Preview and send your document	<p>When you've finished adding documents, recipients, messages, and signing fields, you are ready to preview your work and send your envelope.</p> <ul style="list-style-type: none">● To save a draft without sending, click ACTIONS and select SAVE AND CLOSE.● To cancel the envelope preparation and return to your Manage page, click ACTIONS and select DISCARD.● To preview your recipients' experience, click RECIPIENT PREVIEW.● To send your envelope, click SEND.
Step 6: Save your signature	Click ADOPT AND SIGN to adopt and save your signature information and return to the document.
Step 7: Confirm signing	When you finish clicking all signature tags in the document, confirm signing by clicking FINISH .