**DocuSign (Select Information from Manual) and Videos**

[Thanks for Linda K from OTT for the selected manual info copied from DocuSign]

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# Get started with a video tour

Looking for a preview of how to use the new experience? Get started with our introductory

videos covering how to send and manage your documents, and how to create and use

templates:

**How to Use DocuSign – Step-by-Step Tutorial**

<https://www.youtube.com/watch?v=vpHz1cuqaPE>

**DocuSign Signing FAQs**

<https://support.docusign.com/en/articles/DocuSign-Signing-FAQs>

**How do I access the DocuSign documents that I signed?**

<https://support.docusign.com/en/articles/How-do-I-access-the-DocuSign-documents-that-I-signed>

**Sending Documents for Signature**

<https://support.docusign.com/en/guides/ndse-user-guide-send-a-document>

**Templates**

<https://docs.docusign.com/supportdocs/ndse-help/Content/templates.htm#dqj1578456412286>

**The Signing Experience for Recipients**

<https://support.docusign.com/en/videos/New-Signing-Experience>

**Sign a Document Yourself**

<https://support.docusign.com/en/videos/Prepare-and-Sign-a-Document>

**DocuSign eSignature - eLearning Self-Paced Courses for Signers, Senders, and Admins**

<https://support.docusign.com/en/articles/000039414>

# Basic Sending Steps

The basic steps for creating and sending a document for signature are as follows:

1. **Start an envelope**. You can start with a new envelope, use a template stored in

DocuSign, or finish a previously saved draft.

2. **Add your documents**. DocuSign supports a broad variety of file formats. Select files

from your local machine or from cloud storage providers like Google Drive or Dropbox.

3. **Add recipients**. Specify who receives your envelope and what action you want them to

take.

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DocuSign

4. **Add messages**. Enter the email subject and message details for your recipients.

5. **Advanced Options**. Set special recipient privileges, reminder settings, and expiration

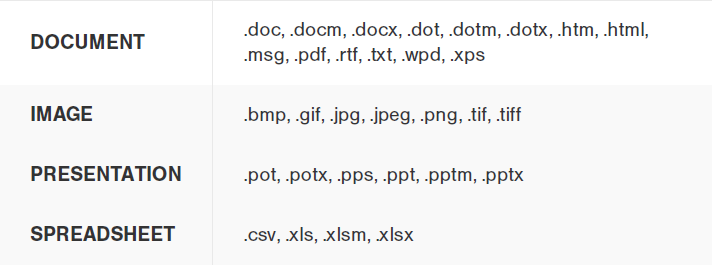
options.

6. **Add fields**. For each recipient, add fields to your documents to gather the desired electronic

signatures and other information, such as title, date signed, and more.

7. **Preview and send**. Review your field setup and send the envelope to your recipients.

**Supported File Types**



**Note**: DocuSign does not support files with password security enabled. To send a file with

password security, remove the security setting before uploading the file.

**File Size Limitations**

Maximum file size is 25 MB but recommended size is 5 MB. There is no limit for the cumulative file size of all files uploaded to an envelope, and no limit to the number of files you can upload.

# Reorder Documents

You can change the order of the documents you upload to DocuSign. No matter what order

you upload your documents, as long as you have not yet sent the envelope, you can

rearrange the order. From the Prepare view by hovering over the thumbnail or from the Add Fields view by selecting Other Actions|Edit Documents.

To rename a document in an envelope

You can change the name of a document after you upload it to a DocuSign envelope.

1. From the prepare view, after you upload a file to an envelope, click the menu icon

below the document name and select **Rename Document**.

To delete or replace a document in an envelope

After you upload a file to a DocuSign envelope, you can delete or replace it.

To delete a file, from the prepare view:

a. Click the menu icon below the document name and select **Delete**.

# Send Supplemental Documents

You can use supplemental documents to provide additional information to recipients which

does not require signature. From the document menu under the uploaded file and choose **Set as Supplement**. After adding a supplement, continue to the Add Fields view. Choices are Must View, Must Accept and Must Read (available only if both Must View and Must Accept are selected). For each supplement, you assign the required recipient actions for each recipient. Supplemental document interactions are logged in both the History and Certificate of

Completion for an envelope.

# Add Recipients

Once you select the documents to send, you add the recipients who will receive and sign

your documents, or just receive a copy. You provide an email address and name for each

recipient. Recipients do not need a DocuSign account. Even without an account, they can

still open your document and complete their signing action.

To set the appropriate action for the recipient, choose one of the following from the

drop-down list:

Document recipients:

l **Needs to Sign** - recipient must complete the required fields assigned to them, such

as, signature, initial, and date.

l **In Person Signer** - a DocuSign account holder hosts the signing session for the

recipient. Learn more...

l **Receives a Copy** - recipient receives a copy, with no further action required.

l **Needs to View** - recipient must open and view the document.

(Optional) Specify a signing order for the recipients to control the order in which your

recipients receive and sign your documents. For more information, see the guide Set a

Signing Order.

5. (Optional) To require a recipient to provide additional information to identify themselves

during the signing process, add an authentication method:

a. In the recipient's row, click the **More** drop down and select **Add access**

**authentication**.

Receive a copy of the completed document

Your account and personal preferences may be set such that you automatically receive a

copy of the completed documents by email.

# Set a Signing Order

If your envelope has more than one recipient, you can choose to set a signing order. The

signing order lets you control the order in which your recipients receive and sign your

documents.

A convenient signing order diagram allows you to see a visual representation of how your

envelope will be distributed to the recipients.

With **Set signing order** enabled, you can specify a recipient routing order. (Select the **Set signing order** check box.) You can set up

a simple sequential routing order, where each recipient receives the email notification once

the previous recipient has completed their action. You can also have a mix of sequential

and parallel routing.

With **Set signing order** disabled, all recipients receive the document in parallel.

4. To set a parallel order, such that some recipients receive the document at the same

time, set the same value for the signing order.

5. To see a visual representation of the recipient routing for your document, click the

signing order diagram.

Once you send the envelope, the color of the recipient circles will indicate status as

follows:

l **White** - recipient is next in line to sign

l **Gray** - recipients awaiting their turn to sign

l **Green** - recipient has completed signing

l **Red** - there is a problem with the recipient. Hover over the status circle for additional

information, including "Auto Responded" (indicates the email notification could not

be delivered to the recipient.

# Require Recipients to Draw Each Signature

For some transactions, you may want to require a recipient to draw their signature, rather

than use a DocuSign preformatted style or upload an image, and to do so for each

signature or initial field in a document. Typically, this is a required practice for certain

financial or legal transactions. You can set a recipient option to require they draw all signature and initials on your

documents. When the recipient opens your documents to sign, as they click on each

signature or initial field tag, they are prompted to draw their entry. They can only draw their

script; the other options to select a preformatted style or upload an image are not present

during signing.

1. From the prepare view, add the recipient.

2. Click **More** and select

3. Under Signing Settings, select the option **Draw a new signature for each signature or**

**initial field**. **Advanced Settings**:

4. Repeat these steps for each recipient to whom you want to apply the requirement to

draw each signature.

# Add Messages

DocuSign sends the notification for your signature transaction to recipients through email.

After you add recipients, you enter the email subject and message. The subject is also

used for the envelope title. This title is how you identify your envelope on the Manage page

and is presented to your recipients as the notification email subject. For the message sent to all recipients, the message subject line is automatically generated

from the names of the files you upload to your envelope. The subject is prefixed with

"Please DocuSign:". For example, if you upload a file named "NDA Agreement", your

subject line defaults to "Please DocuSign: NDA Agreement". If you upload multiple files, the

file names are added to the subject line, up to the 100-character limit. You can change the

subject line to anything you like.

Add private messages to individual recipients

In addition to the general message, you can create private messages for individual

recipients. Only the selected recipient sees the private message. Private message

recipients see both the general message and the private message. A private message is

included in the email notification under the heading **Notes** and is also visible when the

recipient opens the documents to view and sign.

To add a private message for one recipient

1. In the recipient's row, click **More** and select **Add private message**.

The Private Message panel opens.

2. Enter your message text and click **Close**.

To remove a private message

You can remove a private message from a draft envelope, or when correcting an in process

envelope.

1. In the recipient's row, click **More** and select **Add private message**.

2. In the Private Message panel, click **Discard**.

# Set Advanced Options

When preparing envelopes, you can set various recipient privileges, reminder settings, and

expiration options. These options are, by default, controlled from the Sending Settings set

for your account, where you specify settings for all of the envelopes that you send. You

can override these default options at any point in the process of preparing documents for

signature.

2. Open the Advanced Options for the envelope by clicking the **Edit** link by the Advanced

Options details:

3. In the Advanced Options dialog, modify the default settings for the envelope. The

available settings are described in detail below.

Allow recipients to sign on paper

(Default: On)

Allow recipients to change signing responsibility

(Default: Off)

Allow recipients to edit the document

(Default: Off)

Turn on auto navigation

(Default: On)

Reminders

(Default: Off)

Expiration

(Default: 120 days; no warning)

Sender Settings

If enabled for your account, you can choose whether or not to automatically **Stamp**

**documents with envelope ID**. This stamp appears at the top left of every page in your

document. This automatic stamp cannot be repositioned. Furthermore, the envelope ID becomes a

permanent part of your document and cannot be removed.

If you want the ID on the document but prefer it in a different location, disable this setting

and instead use the Envelope ID field to place the ID exactly where you want it to appear.

# Control Envelope ID Placement

The Envelope ID is a long, unique identifier generated for each envelope by the DocuSign

system. When you send an envelope, you can control whether or not the ID is included on

documents, and where and how it appears. Regardless of whether the Envelope ID is

stamped on your documents, it is always recorded in the envelope History.

How it works

If you choose to add the ID to your document, the ID is seen by all recipients and becomes

a permanent part of the document and cannot be removed.

For the Envelope ID, you have the following options:

l Automatically stamp the ID at the top-left of every page in your document

l Manually place the ID where you want it to appear, and set the font and other formatting

properties

l Send a document without the ID appearing anywhere on it

To automatically stamp every page with the Envelope ID

1. Start a new envelope and add documents and recipients as usual.

2. Open the Advanced Options by clicking the **Edit** link.

3. Under Sending Settings, select the option **Stamp envelope ID onto top left of every**

**page**.

4. Send your envelope.

To manually place and format the Envelope ID on a document

1. Start a new envelope and add documents and recipients as usual.

2. Open the Advanced Options by clicking the **Edit** link.

3. Under Sending Settings, clear the option **Stamp envelope ID onto top left of every**

**page**.

4. Continue to the Add Fields view.

5. Select the Envelope ID field in the list of Standard Fields and then place it at the desired

location in your document. It does not matter which recipient you assign the field to; all

recipients will see the ID when they view or print the document.

6. (Optional) To adjust the appearance of the field, select it, and then expand the

Formatting properties and set the font, font size, and other characteristics.

7. Send the envelope.

To send a document without the Envelope ID on it

1. Start a new envelope and add documents and recipients as usual.

2. Open the Advanced Options by clicking the **Edit** link.

3. Under Sending Settings, clear the option **Stamp envelope ID onto top left of every**

**page**.

4. Continue to the Add Fields view and add fields as usual, but do not add the Envelope

ID field to the document.

# Add Fields to Documents

Once your envelope includes files, recipients, and messages, you add the fields that

instruct your signers to provide their signature, initials, or other information. You add a

unique set of signing fields for each recipient.

2. In the recipients list at the top of the page, select a person to add fields for.

**Note**: The fields you add apply only to the selected recipient and are color-coded to

match the recipient's color. You can only add fields for the recipients you designated

as signers.

3. In the page guide at right, select a page you want to tag with fields.

The selected page becomes the active page and displays in the center panel.

4. From the Fields palette at left, click and drag one of the available field types to add it to

the active page.

5. To adjust the look, the assigned recipient, or other characteristics of a field, click the

field. The Field Properties panel slides in over the page guide. Set the properties as

desired.

6. Use the page guide to scroll through the pages and add more fields for your recipient.

To align fields

l Select two or more fields (**SHIFT+Click** or click and drag), and use the alignment tools

in the Field Properties panel.

# Field Types

You can add the following standard fields to your documents:

Types of fields

l **Signature.** New users first confirm their signing name and initials, and then select a

signature style. When they adopt their signature, it is applied to the signing field.

Otherwise, the signature is applied with a single click. Easy! The signing name is the

name as you entered it when you added the recipient to your document. Default:

Required

l **Initial.** Just like signing, new users first adopt a signature, and then their initials are

applied to the document. Default: Required

l **Date Signed.** This field is automatically filled in with the current date. Your account

administrator can set the format of the date for all documents sent from your account, in

the Signing Settings set for your account. The format can include a time stamp.

l **Name.** This name field supports three formats: First Name, Last Name, or Full Name.

Place the field on your document. In the properties panel on the right, select the name

format. For First Name, the first word of the name is used. For Last Name, the last word

of the name is used

Depending on the format you choose, the field automatically populates with the

recipient's name, or portion of the name, as you entered it when you added the recipient

to your envelope. If the recipient changes their name when they adopt their signature,

the Name field updates to reflect the new name. Default: Full Name

l **Company**. This field automatically populates with the recipient's company name as

specified in their preferences My Identity information. If your recipient does not have a

DocuSign account, or they have not specified a company name then this field is a blank

free text field in which they can enter their information.

l **Title.** Just like the Company field, the Title field automatically populates with the

recipient's title from their My Identity information. Otherwise, the recipient can type in

their title.

l **Email**. This field automatically populates with the recipient's email address.

l **Attachment**. The Attachment field allows you to request additional documentation from a

recipient. The recipient is asked to upload or fax in the documentation. When they

complete the document, the attachment is added to the final document and can be

downloaded or printed.

The Attachment field can be required or optional. If you set the **Required Field** property,

your recipient must attach a file in order finish signing. Default: Required

l **Approve.** The Approve field offers an alternative to a required Signature or Initial field for

recipients to approve your documents. The Approve field is always required. If the

recipient clicks Approve during the signing process, the recipient is considered to have

signed. If the recipient has completed all other required fields, when they click Approve,

they complete the signing process.

The Approve field does not add any information on the document, but it records and

"Approved" action in the Document history. For your recipient to decline the document,

you can add the Decline field, or they can use the Decline to Sign option.

You can adjust the name of the field, as seen by the recipient, using the **Button Text**

property.

l **Decline.** The Decline field works the same way as the signing option Decline to Sign. If

the recipient clicks the Decline tag during signing, any remaining fields on the

documents are skipped, and he is prompted to provide a reason for declining. The

Document history records the action and the reason provided by the recipient. You can

adjust the name of the field, as seen by the recipient, using the **Button Text** property.

l **Envelope ID.** The Envelope ID fields allows you to manually place the envelope ID

anywhere on your documents. This ID is the unique identifier for an envelope. This

identifier is shown in the History, the Certificate of Completion, some envelope reports,

and is useful for API developers using the DocuSign API. You can use the Envelope

ID field to place and format the ID as you want it to appear. You can set the position, font

type, size, and color of the ID stamp.

As an alternative to using the Envelope ID field, you can set the Advanced Option for a

document to automatically stamp the envelope ID onto the document. The stamp is

placed at the top left of every page of the document.

You can use either the Envelope ID field or the automatic stamp, or you can use both on

a document. However you choose to add the envelope ID to your document, be aware

that the ID stamp becomes a permanent part of your document and cannot be removed.

# Field Properties

When you add fields to your documents, you can set a variety of properties. With these

properties you can do things like:

l Make a field required or optional

l Change the recipient for a field

l Enter data in the field and make it read only for recipients

l Apply data validation to enforce data entry rules for the recipient

l Set the font, size, or color for a text field

l Hide the recipient's entry in a text field with asterisks for added data security

l Set up conditional field relationships

To edit field properties

To access the property settings, do either of the following:

l For a single field, click the field to select it.

The field properties panel slides in over the page guide on the right-hand side to reveal

the settings you can adjust:

For multiple fields, click and drag to encompass the fields to change, or press

**SHIFT+Click** to select each field.

The field properties panel slides in. The changes you make to the properties apply to all

of the fields currently selected.

Basic properties

l **Recipient** - controls which recipient the field applies to; use this property to change the

recipient for a field tag.

l **Required Field** - specifies whether the field is required or optional; required fields must

be completed by the recipient in order to finish the signing process. Only the following

fields have this property: Signature, Initial, Company, Title, Text, Radio Button, Dropdown,

and Attachment.

l **Formatting** - defines the font family, size, and color, and character styling; for text fields,

there is an additional formatting property to hide the text entered with asterisks, concealing

the data from anyone else viewing the document. For signature and initials

fields, there is a scale % property you can use to set the size of the field (50 -100%)

l **Tooltip** - provides use tips that appear when the recipient mouses over the field.

Field types with a required option

The following field types default to required but can be set as optional:

l Signature

l Initial

l Text

l Company

l Title

l Attachment

How to tell the difference between required and optional fields

Required fields are filled with the recipient's color, as indicated by the color square next to

their name in the **Add fields for:** list. Optional fields have a border in the recipient’s color.

3. In the properties panel, uncheck the **Required Field** property. The field is now optional

and signers can choose whether or not to complete it.

# Delete Pages From a Document

If you upload documents containing pages you don't want to include for recipients, you

can easily delete the unwanted pages.

To delete pages

1. After preparing your envelope with documents, recipients, and messages, continue to

the Add Fields view.

2. In the Documents list at the right, scroll through the page guide to locate the page you

want to delete.

3. Hover over the page thumbnail with your mouse until a trash can icon appears at the

bottom right corner of the image.

4. Click the trash can icon to remove the page. Any fields on the page are deleted, along

with the page.

# Rotate Pages in a Document

You can rotate individual pages in a document. If you upload a document and then find you

need to rotate a page, you can do so when you add fields for your recipients to complete.

To rotate a page

1. After preparing your envelope with documents, recipients, and messages, continue to

the Add Fields view.

2. In the Documents list at the right, scroll through the page guide to locate the page you

want to rotate.

3. Hover over the page thumbnail with your mouse until a set of controls appears at the

bottom of the image.

4. Click the **rotate** icon. Each click rotates the page clockwise 90 degrees.

About field resizing

The fields which you can scale have sizing handles at each corner. Click and drag on any

corner to resize the field. Signature and Initials fields can also be resized by setting a scale

%. Fields which are populated automatically with recipient information cannot be resized.

# Preview and Send

Once you finish adding documents, recipients, messages, and signing fields, you are

ready to preview your work, and then send your envelope.

From the Add Fields view, the top navigation bar presents options to send, preview, save,

or discard the envelope:

l To preview your recipients' experience, click **Other Actions** and select **Preview**.

l To send your envelope, click **Send**.

l To save a draft without sending, click **Other Actions** and select **Save and Close**.

l To cancel the envelope preparation and return to your Manage page, click **Other**

**Actions** and select **Discard**.

Once you send your envelope, your recipients receive an email notification, asking them to

review and sign.

# Recipient Identity Authentication

Recipient identity authentication is an option you can set for individual recipients,

requiring them to provide additional information to prove their identity. Identity

authentication methods include: phone (extra charge), SMS, and knowledge-based ID check. You can

select one method for any or all of the recipients on an envelope. If your business case

requires a higher threshold for recipients to prove their identity, then use authentication.

Optional or required

By default, recipient authentication is not required; when you send an envelope, you

choose whether or not to apply this feature.

Access codes for basic recipient security

In addition to an authentication method, you can add an access code requirement. You add

a code to the envelope and communicate the code to the recipient. The recipient must enter

the code correctly in order to view and sign the document.

Combine access codes and recipient authentication

To enhance document security even further, you can combine an access code with a

recipient authentication method.

# Sending using Digital Certificates

DocuSign offers digital certificates as part of its Standards-Based Signatures platform.

Using digital certificates during signing provides higher levels of identity authentication

and document transaction security.

What signature types does DocuSign support?

1. Electronic Signature -The most common type of e-signature and used by the majority of

DocuSign customers. It does not require ID proofing to complete and does not apply

digital certificates to the transactions.

2. Express Signature - Similar to the DocuSign Electronic Signature with additional security

as a digital certificate is applied to the transaction.

3. EU Advanced Electronic Signature - Used in cases where additional user validation is

required. Sender is required to verify the identity of the signer. A digital certificate is

generated as part of this transaction. See section below for more about EU Advanced

Electronic Signatures.

What is an Express Signature?

Part of DocuSign's Standards-Based Signature portfolio, Express Signature is a digital

signature that ensures PKI standard and X509-compliance for any transaction. Express

Signature differs from EU Advanced Standards-Based Signatures in that it does not require

identity proofing.

# The Signing Experience

In addition to this guide, we offer more support articles for signers on our website at

DocuSign Support - Help With Signing.

For your recipients, this is a good article to help walk them through the signing process:

How do I sign a DocuSign document?

Manage page for basic status information

The Manage page provides basic status for your envelopes. From this list, you can see the

following details:

l **Subject** - provides the title of your transaction, which is generated by the Subject line of

the message

l **Status** - specifies the current status of the envelope, such as Completed, Waiting For

Others, Voided, and Draft

l **To:** - the list of recipients for the envelope

l **Last Change** - provides the date of the current status

Details view for more specifics

The Details view, which you can see by clicking on an envelope in the Manage list, gives

more specifics on the signing status. The view shows each recipient's activity on the

envelope, including the date viewed, which recipients have signed, and which have yet to

complete the signing transaction.

**Recipient status**

The status for each recipient is similar to the overall envelope status options:

l **Needs to Sign** - The recipient has not yet signed.

l **Copy Received** - The email notification was sent to a cc: recipient. When the recipient

views the document, the date is recorded.

l **Signed** - The recipient has finished signing. This status includes a **Signed in location**

link. This link provides the geolocation of the signer at the time of signing.

l **Needs to View** - The recipient has not yet viewed the document.

l **Viewed** - The Needs to View recipient reviewed the document on the date specified.

l **Authentication Failed** - The recipient failed to pass the access authentication requirement

for the envelope. Authentication failures are recorded in the Envelope History,

which you can check for more details on the failure. These failures are listed in the Activity

log as "IDCheck Failed".

l **Auto Responded** - The email notification failed to reach the intended recipient. Check

the email address used and correct as needed. For this recipient status, on the Manage

page, you'll also see the status **Delivery Failure: Email bounced**.

l **Declined** - The recipient declined to sign.

History and Certificate of Completion

Sometimes you need a complete audit trail of your DocuSign transaction. In addition to the

Manage page and Details view, which provide basic document and recipient status, there

are two additional resources containing further document details: the envelope History and

the Certificate of Completion. These resources provide

a full audit trail of your DocuSign transaction. If a participant in the transaction repudiates

their signature, or if there is any question about the transaction, this audit trail can resolve

all such objections. These records are available to all participants in a transaction.

Envelope History

The History provides a summary of the envelope and document details and a list of

Activities to date.

**Certificate of Completion**

This resource provides complete details of the envelope events and the executed

Consumer Disclosure. The Signer Events section provides details about each signer on

the document, including the signer's IP address and other identifying information,

signature image, and event timestamps.

1. From the Manage page, locate the envelope by searching, filtering, or simply scanning

the list.

2. Click the envelope to show the Details view.

3. To view the complete History, click the **More** drop-down and select **History**.

4. To download and view the Certificate of Completion PDF, click the **Download** icon and

select **Certificate of Completion**.

# Correct Envelopes

You can correct the details of in process envelopes that you sent or are shared with you,

including both the recipient and document information. If you leave the Correct view without sending the envelope, your changes are discarded

and the status reverts to the previous state.

To correct an envelope

1. From the Manage page, locate the in process envelope for which you want to correct

information.

2. Click the action me

3. The Prepare view appears, with the status **Correcting** and you can edit the documents,

recipient information

4. For recipient details, you can change the email address, name, routing order, recipient

action, private message, and authentication.

5. To modify the expiration date or reminder details, or change recipient signing options,

next to Advanced Options, select **Edit**., and fields:nu and select **Correct**.

6. When you are done editing the Prepare information, click **NEXT**.

7. Delete, modify, or add fields as needed, then click **CORRECT** to reissue the document

to your outstanding recipients whose turn it is to sign.

The envelope is corrected and returns to the previous status state. If you modified

recipient information, in process recipients receive a new email notification, which

contains a new link to the envelope. Links in any previously received email notifications

will no longer work and the recipient must use the link in the new email.

**For recipients**, if they have not yet finished signing, you can correct any of the following

information:

l Email address

l Name

l Routing order

l Recipient action

l General or Private Message

l Authentication

In addition, you add new recipients and remove recipients entirely from a envelope.

**For the files uploaded to your envelope**, you can add and delete files, and add or change

recipient fields. You can also modify any of the advanced options for the envelope, such as

extending the expiration date. Note that, if *any* recipient has completed signing, you can no

longer delete or reorder the existing files. You can still add new files, and add fields to

existing files.

**For automatic reminders**, if they are enabled for an envelope, then correcting resets the

time sent for automatic reminder notifications. For example, if your automatic reminders are

set for 3 days and you correct and resend an envelope, the automatic reminder will be sent

3 days after the correction, not 3 days after it was originally sent.

# Add Signatures to a Completed Document

If you have a completed document but now you want to add additional signers or get more

information from the original recipients, you’ll have to create a new document to do so. You

have two options:

l **Forward the completed envelope**: Forwarding creates a copy of a completed envelope

which you can send to new recipients as is or add new documents and fields as

needed. For a forwarded envelope, you cannot remove any information or signatures on

the completed documents, but you can add new recipients, documents, and recipient

fields.

l **Clone the original envelope and start over**: Redo the original envelope entirely so that

all audit information is in one transaction. You can create a copy of the original envelope

– cloning makes an exact copy of what you sent the first time—and add files, recipients

and fields as needed.

# Void Envelopes

Voiding an envelope cancels all outstanding signing activities. You can void any of your

sent envelopes that have not yet completed. You can only void envelopes that you sent or

manage, or are shared with you, and that are still in process. Envelopes with a status of

either Waiting For Others, Needs to Sign, or Needs to View are in process.

To void an envelope

You can void any envelope that you sent or manage, or is shared with you, and that is still

in process. Be aware that if you *delete* such an envelope, that also *voids* the envelope.

1. From the Manage page, locate the in process envelope that you want to void.

2. Click the **drop-down arrow** to show the actions menu and select **Void**.

3. Enter a brief reason for voiding the document. This reason is included in the email notification

sent to recipients, and is added to the envelope Details and History views.

4. Confirm your action by clicking **VOID**.

The envelope is voided, and the status in the Manage list changes to Voided.

Access to voided envelopes

When you void an envelope, recipients who have not yet signed can no longer view or sign

it. For recipients who have finished signing and the sender, voiding does not restrict their

access to it. However, a "VOID" watermark is placed on all pages.

Notifications for voided envelopes

When you void an envelope, all recipients who have either finished signing or whose turn it

is to sign receive an email telling them that the envelope was voided. If there are recipients

further down the routing order, they do not receive any notification regarding the voided

envelope.

If you do not want void notifications sent to recipients whose turn it is to sign, you can

correct the envelope to remove them from the routing order. After you correct the envelope

you can void it, and notifications will be sent only to the recipients who have already

finished signing.

# Delete Envelopes

You can delete any of your sent or received envelopes, regardless of what state they are in.

You can delete draft, in process, completed, and voided envelopes. Deleting an envelope

that you sent cancels any outstanding signing activities and voids the transaction. For any

deleted envelope, after a short delay, it is permanently removed from your DocuSign

account.

Deleting an in process envelope that you sent, manage, or is shared with you will also void

the transaction. If you are trying to clear out your Inbox or Sent folder and want to avoid

voiding an in process envelope, you can instead move the envelope to a personal folder. Deleted envelopes remain in your Deleted bin for less than 24 hours after which they are removed permanently and cannot be recovered.

To delete an envelope

Be aware that if you delete an in process envelope you sent, manage, or is shared with

you, it will also void the transaction for all recipients.

1. From the Manage page, locate the envelope you want to delete.

2. Click the drop-down action list for the envelope and select **Delete**.

3. The envelope is deleted and placed in your Deleted bin.

# Resend Envelopes

Resending an envelope sends another copy of the original email notification to all signers

whose turn it is to sign and have yet to finish signing. These recipients receive the same

email notification as was originally sent to them with an updated link to review and sign the

documents. Links in any previously received email notifications will no longer work and

the recipient must use the link in the new email.

How to resend an envelope

There are two ways to resend an envelope:

l Resend to all outstanding recipients whose turn it is to sign

l Resend to just one recipient

To resend from the Manage page or Details view

1. From the Manage page, locate the in process document which you want to resend, and

click **RESEND**.

2. (Optional) To review the detailed status of an envelope before resending

a. Click the title to open the Details view.

b. To resend the email notification to the outstanding recipients whose turn it is to

sign, click **RESEND**

An email notification for your envelope is sent to all outstanding recipients whose turn it is

to sign. The email contains a new link to open the envelope. The link in any previous

notification will no longer work.

To resend an envelope to just one recipient

If you want to selectively remind a single recipient, you can use the Correct feature to add

or edit the Private Message. When you modify the Private Message for a recipient, an email

notification is issued to that person, with the new Private Message text and a new link to the

envelope.

1. From the Manage page, locate the in process document which you want to resend and

click the title to open the Details view

2. Click **Correct**.

3. For the recipient you want to remind, click the **More** menu and select **Add private message**

and enter your message.

4. Click **Done**. The message panel collapses and shows a private message is added for

the recipient.

5. Click **Next**, and then **Save and Resend**.

The recipient receives a new email notification with your updated private message and

a new link to open the envelope. The link in any previous notification will no longer

work.

**When to use resend**

The resend feature is useful for these situations:

l Your recipients have deleted or lost the original notification email

l You want to remind the outstanding recipients whose turn it is to sign to DocuSign your

document

l You added access code authentication to your document and the recipient

fails the validation

process; resend gives them another chance to pass the authentication challenge

# Clone Envelopes with Create a Copy

The Create a Copy option clones an envelope to make a copy, which contains all of the

same uploaded files, recipients, and signing fields. You can clone any envelope you

created that is either in progress, completed, or voided.

Create a Copy is a great time saving feature that allows you to leverage the preparation

work you've already done. Once you copy an envelope, you can modify any aspect of it.

You can add files, change recipients, modify the message, and make changes to the

signing fields.

Common use cases for cloning:

l Copy a completed envelope to send to a new recipient.

l If you void an envelope, you can create a copy, make any necessary changes, and send

it again.

To create a copy of an envelope

1. From the Manage page, locate the envelope by searching, filtering, or simply scanning

the list.

2. Click the **drop-down arrow** to show the actions menu and select **Create a Copy**.

3. Make whatever changes to the envelope you like: add or remove files, recipients, or

modify the message.

4. To make changes to your recipient fields, click **NEXT**.

5. To send your envelope, click **SEND**.

# Forward a Completed Envelope

Forwarding creates a copy of a completed envelope which you can send to new recipients

as is or add new documents and fields as needed. For a forwarded envelope, you cannot

remove any information or signatures on the completed documents, but you can add new

recipients, documents, and recipient fields.

You can forward any completed envelope that you sent or received, or created to sign

yourself. If you have access to any shared envelopes, you can forward any of those sent or

received by the owner.

To forward a completed envelope

1. From the Manage page, locate the completed envelope that you want to forward by

clicking the **Completed** Quick View, and then searching, filtering, or simply scanning

the list.

2. Click the action menu for the envelope and select **Forward**.

3. In the new envelope, the completed documents are present and renamed to include the

prefix "FWD:". You can add documents or apply templates as needed.

4. Add recipients to the new envelope and fill in the message details. The message subject

becomes the envelope name in your account, and the message is included in the email

notification sent to all recipients.

5. Click **NEXT** to add fields for your recipients.

The previously completed documents retain all information and signatures committed

on the original envelope; you cannot remove or change any of this detail.

6. Add fields for your recipients as needed.

7. Click **SEND** when you're ready to send the new envelope.

The envelope is sent to the recipients you defined. They can see all the information and

signatures that were on the original documents, and complete their assigned fields.

# Folders

To organize your envelopes, you can create folders and subfolders from the Manage page.

You can move items out of your general **Inbox** and **Sent** views by putting them into folders.

Once you create one or more folders, you can file your envelopes by either of these

methods:

l Select the envelope and click **MOVE** at the top of the list.

l Drag and drop the envelope from the list to the desired folder

By default, the folders show your envelopes from the last six months. You can use the

**Load All** option for folders with no activity in the last six months. Or you can edit the filters

applied to your folder.

To create, edit, delete, and move folders

1. Navigate to the Manage page.

2. To create a top-level folder:

a. Click the **+** icon at the top of the Folders list.

b. In the New Folder dialog, enter a folder name and click **Create**

The new folder appears in your Folders list.

3. To create a sub-folder:

a. In the list of folders, select the parent folder for the new subfolder.

b. Click the menu icon next to the folder name, and select **New Subfolder**.

c. Enter the folder name and click **Create**.

4. To edit or delete an existing folder, click the menu icon next to the folder name.

l To edit the folder name, select **Rename**.

l To delete the folder, select **Delete**.

**Note**: only empty folders can be deleted.

5. To move a folder:

a. In the list of folders, locate the folder you want to move.

b. Click the icon next to the folder name, and select **Move**.

c. In the Move to Folder dialog, select where you want to move the folder to. You can

move the folder inside an existing folder, into a new folder, or out of a folder and into the main Folders list.

# Download or Print Documents

To download documents

1. From the **Manage** page, locate the envelope that you want to download.

2. Click the envelope name to go to the Details view.

3. To download the envelope contents, click the **Download** icon at the top of the view and

select which files you want to download:

l For separate files in a ZIP file - check **All** for all files, or check the files you want to

download as separate files in a ZIP file. **Document** gives you all of the documents in

the envelope.

l For a single PDF of all files in the envelope - check **Combine all PDFs into one file**.

4. The selected files download to your local Downloads folder.

To print documents

1. From the **Manage** page, locate the envelope that you want to print.

2. Click the envelope name to go to the Details view.

3. Click the **Print** icon at the top right of the view.

The PDF appears containing all documents in the envelope and the Certificate of

Completion.

4. Use the controls provided to print or save a copy of your document.

# Envelope Status

Every envelope that you create or receive through DocuSign, has a status. The status

indicates the current state of the transaction. This list defines all of the possible statuses:

l **Draft**. For an envelope you created and then saved without sending. Draft envelopes are

stored in your account for 30 days from the date they were created. After 30 days, drafts

are removed from your account and purged from the system.

l **Sent**. The email notification has been sent to at least one recipient. The envelope

remains in this state until all recipients have viewed the documents. (Shown in Reports

and History only)

l **Delivered**. All recipients have viewed the documents. (Shown in Reports and History

only)

l **Waiting for Others**. The envelope has at least one recipient who has yet to complete

their action. The recipient status in the Details view shows whether the outstanding

recipients need to sign (Needs to Sign) or view (Needs to View). From the Manage page,

you can see whose turn it is to sign by hovering over the status.

l **Needs To Sign**. You are a recipient and you need to sign.

l **Needs to View**. You are a certified delivery recipient and you are required to view the

document.

l **Correcting**. The sender started to correct an in process envelope and has not yet saved

his changes. In this state, any outstanding signers are unable to view or sign. The

sender must either save or cancel his changes in order to move the envelope out of the

Correcting status.

l **Voided**. The sender canceled the envelope before it was completed. Recipients can no

longer view or sign the document. Voided documents appear in your sending account

as voided. You can still view and print the document, though it has a "VOID" watermark.

l **Declined**. A signer has declined to sign.

l **Completed**. An envelope is completed once all of the recipients have completed their

actions.

l **Expired**. A document that has exceeded its set expiration period without completing will

expire. Recipients can no longer view or sign the expired document. Expired documents

appear in your sending account as voided. You can still view and print the document,

though it has a "VOID" watermark.

l **Delivery Failure**. The email notification did not reach the recipient. Review the Details to

see which recipient status is listed as **Auto Responded**. For this recipient, check the

email address you entered and correct the document to fix any errors. From the Manage

page, you can see which recipient delivery failed by hovering over the status warning.

l **Authentication Failed**. At least one signer has failed the authentication check. You can

either send a reminder to the recipients, which gives the signer another chance to

access and pass the authentication. Or you can correct the envelope and modify the authentication setting. The envelope History provides additional detail on the authentication

failure.

l **Completed or Voided - Purging Soon**. This status indicates that your account is using

document retention to purge completed and voided envelopes from the system after a

set holding period. See Purge Documents for more information.

l **Completed or Voided - Purged**. Your account document retention policy implemented a

purge process on the envelope. The purge holding period has concluded and the envelope

documents have been purged from the system. See Purge Documents for more

information.

# Template Basics

Templates help streamline the sending process when you frequently send the same or

similar documents, or send documents to the same group of people. You can also use the Save as Template feature to make a template out of any of your existing envelopes. You can save a template with as little or as much information as you like. You can save it with just a title or just a document, or any other level of

completeness.

The Difference Between Templates and Documents

Creating a template is as easy as setting up a document. The key difference is that a

document is a one-time transaction and a template is a blueprint for repeatable

transactions. With templates, you can add named persons, just as you do when creating a

regular document. But you can also define *placeholder roles*, that is, not an actual person

but rather a role that would regularly participate in a transaction using the template.

Typically, with templates you assign roles rather than named persons, as it's likely your

recipients and signers will change every time you use the template.

The NDA template example illustrates a situation where you would set a placeholder role

for your template recipient, rather than a named person.

1. From the Templates page, click **NEW** and select **Create Template**.

The prepare view appears where you can add files, recipient roles, and messaging.

2. Enter a name and description for your template.

These entries are visible only on the template itself and are not seen by signers of any

envelopes generated from the template.

3. To upload one or more files to the template from your local machine or from one of

your authorized cloud storage providers, follow the regular procedure described in

Add Files.

4. To add recipient roles, do the following:

a. Define the role for the recipient in the Role field. The role helps template users

understand whom to enter as the recipient when they use the template to send a

document. Example: Applicant

**Note**: Enter a unique Role to represent each individual who must sign your

document. Example: Applicant 1; Applicant 2. You can use the signing order option

if you need to route the envelope to the same role more than once.

b. Select the signing action for the placeholder role. Example: Needs to Sign

c. To add additional recipient roles, click **ADD RECIPIENT** and repeat steps a-b.

5. To add named recipients, do the following:

a. Enter the person's email address and name.

b. Select the signing action for the recipient.

c. (Optional) Enter a role for the recipient. The role entry is optional and is useful to

define why the person is signing the document. Example: Sales Approval

d. To add additional named recipients, click **ADD RECIPIENT** and repeat steps a-c.

6. To set a routing order for your document or add an authentication method, follow the

regular procedure described in Add Recipients.

7. To define a standard message for your template, or to add private messages for individual

recipients, follow the regular procedure described in Add Messages.

8. To set advanced options, such as reminder and expiration schedules, or to add a password

to protect your template from being modified, click the **Edit** link next to the

Advanced Options details. See Set Advanced Options for more information.

9. To save your template without adding fields, click **Other Actions** and select **SAVE AND**

**CLOSE**.

10. To set the signing fields for your document, click **NEXT**.

11. To add signing fields for each of your template recipients, follow the regular procedure

described in Add Fields to Documents.

12. To finish your template, click **SAVE AND CLOSE**.

Your template is saved and ready to use.

# How to Customize Envelope Titles with Recipient's Name or Email

When you use a template to send envelopes, if you use the default message subject as is,

the envelopes will all be titled the same, making it hard to identify a particular one. This can

be especially problematic if you are using the bulk send feature to send the same

documents to many different people at once.

To customize the envelope titles for each document sent from a template, use the recipient

role and merge fields to automatically insert the recipient's name or email address into the

message subject. The message subject becomes both the email notification message

subject and the name of the envelope as shown in your account. This is a good solution for

a template with a single recipient.

To add merge fields to a template message subject

1. Create a new template and add your files as usual.

2. Add one or more recipients, completing the **Role** field. You can also enter a name and

email address for the recipient but it is not required.

3. For the Message to All Recipients, click the **merge field icon** at the end of the subject

field. The drop-down list contains options to insert the Name and Email Address for

each recipient on the template.

4. Select which merge fields to include in the message subject.

5. Add fields for your recipient as usual, and save and close the template.

6. When you use the template to start a new envelope, the message subject and envelope

title include the recipient information you specified.

**Example** — Inserting recipient's name:

# Edit Templates

You can edit any template that you previously created and saved. If you have access to

templates shared with you by other users, you may be able to edit these as well.

When editing a template, if you decide you do not want to save your changes after all, you

can discard the changes and leave the template in its original form.

To edit a template

1. Navigate to the **Templates** page.

The Template list appears, showing your saved templates.

2. Locate the template you wish to edit by searching, filtering, or simply scanning the Template

list.

3. Click the template actions menu and select **Edit**.

If you do not see the Edit option, check with your DocuSign administrator regarding

your user permissions for templates.

4. If the template is password protected and you are not the owner, enter the password in

the Enter Password dialog and click **SUBMIT**.

The selected template opens in the Prepare Template view.

5. Edit the template. You can change any aspect of the template, including the template

name, and the files, recipients, and recipient fields

To cancel changes while editing a template

1. At any point while editing your template, click **Other Actions** and select **Discard**

**Changes**.

2. Click **Discard** to confirm your action.

Your changes are discarded and your template is restored to its original state.

# To share a template directly

1. Navigate to the Templates page.

2. Locate the template you wish to share by searching, filtering, or simply scanning the

Template list.

3. Mark the check box for the template to select it. You can select multiple templates to

share at once.

4. Click **MORE** and select **Share**.

The Sharing dialog opens for you to select the users and groups to share your

template with.

5. Make your user and group sharing selections - the Search function returns results for

the selected tab:

l **Users** - lists all users on your account.

l **Groups** - lists all groups defined for your account. Groups are listed by name only;

group members are not displayed. The list includes standard account groups of

Administrators and Everyone. By default, all templates are shared with the

Administrators group and this cannot be changed. In addition to the standard

groups, your DocuSign administrator can define customized groups of account

users and can provide further details.

l **Selected** - all users and groups that are selected for sharing. Use this tab to verify

your selections and make any necessary changes.

6. Click **Done**.

# To create a shared template folder

1. Navigate to the Templates page.

2. Click the **New Folder icon** next to Shared Folders.

3. Enter a name for your shared template folder and click **Save**.

When you share the folder, the name you enter identifies the folder to the users with

whom you share it.

4. Click the **menu icon** next to your new folder and select **Share**.

5. In the Sharing dialog, make your user and group sharing selections - the Search

function returns results for the selected tab:

l **Users** - lists all users on your account.

l **Groups** - lists all groups defined for your account. Groups are listed by name only;

group members are not displayed. The list includes standard account groups of

Administrators and Everyone. By default, all templates are shared with the

Administrators group and this cannot be changed. In addition to the standard

groups, your DocuSign administrator can define customized groups of account

users and can provide further details.

l **Selected** - all users and groups that are selected for sharing. Use this tab to verify

your selections and make any necessary changes.

6. Click **Done**.

Your folder is now shared with the users and groups you selected, and these users

can now see the folder listed under their Shared Folders section. Any templates you

add to the new folder are shared automatically and accessible to everyone with access

to the folder.

To share a template by adding it to a shared template folder

1. Navigate to the Templates page.

2. Locate the template you wish to share by searching, filtering, or simply scanning the

Template list, and mark the check box to select it. You can select multiple templates at

once.

3. Click and hold on the template row and drag the template to the shared folder you want

to add it to.

4. Release the mouse button to drop the templates into the folder.

The template is shared and accessible to anyone who you selected to share the

template folder with.

# Protect your shared templates

When you share a template, you grant the selected users or groups the right to edit the

template, provided the users have the necessary permissions (template create or share). To

protect a shared template, you can set a password or lock parts of the template.

l **Set a password.** You can protect your shared template from being modified by other

users by setting a password. Then, if the template is shared with other users, in order

for them to edit the shared template, they must provide the password.

Administrators on your account can access all templates created within the account and

can edit them and modify sharing settings, regardless of the password setting. They

cannot delete templates created by other users. (Only the template creator can delete a

template.)

l **Lock template elements.** You can also apply settings to limit the types of changes that

can be made when the template is used to send an envelope. You can control how the

template is used by locking recipient information, the email message to all recipients

and private messages to individual recipients, and the brand.

To use a template to create an envelope

1. Navigate to the Templates page.

The Template list appears, showing your saved templates.

2. Locate the template you wish to use by searching, filtering, or simply scanning the Template

list.

3. To use the template to start a new document, click **USE**.

4. A new envelope opens with your template settings loaded. If your envelope is complete

with at least one file, one recipient, and one field, then follow To use a complete

template.

5. For any recipient roles, enter the actual email and name values.

6. Enter your Message to All Recipients subject and text. If your template includes a

message subject and text, that information is added to your envelope. You can use the

template message as is, or modify it.

**TIP**: If you send the same envelope over and over, enter a custom subject line. If you

use the default subject as is, the envelopes will all be titled the same, making it hard to

identify a particular one.

7. To review the recipient fields, click **NEXT**.

8. To send your envelope click **SEND**.

# Complete templates

If your template is complete, you can save even more time. For a template to be complete, it

must contain at least one of each of the following items: document, recipient, and recipient

field. When you use a complete template, you have the option to simply fill in your recipient

names and review the email message. If your account uses envelope custom fields, you

can enter the field values

# Add a template to an envelope

If you start an envelope you can add one or more templates to the envelope. You can add

other documents, recipients, and fields to the envelope separate from the templates you

add.

1. From the Home or Manage page, start a new envelope from **NEW > Send an Envelope**.

2. From the prepare view, under Add Documents to the Envelope, click **USE A**

**TEMPLATE**.

3. In the Select Templates dialog, browse or search through the template collections at

left and select one or more templates to use.

4. Click **ADD SELECTED**. The documents, recipients, messages, and recipient fields are

added to your document.

# Manage Your Identity

To manage your identity, go to **My Preferences > ACCOUNT > Personal Information**.

The key tasks for these preferences are:

l **Upload a profile image.** Add a photo to customize your account. If you share your identity

with other users, your photo is included on email notifications, helping your document

recipients feel more confident with their signing experience. The maximum and

recommended image size to upload is 79x79 pixels.

l **Change your name.** If you need to correct or change your name on your account, click

the **Edit** link.

l **Manage Privacy Settings.** Privacy settings control what information you share with

other DocuSign users. Click the **Privacy & Security** link and select the information you

want to share.

l **Change your company name**. You can edit your company name on your account from

the Company field.

l **Manage your signature.** Want a different style for your signature? Click the **Edit** link

next to your saved signature and pick your new look. Or get fancy and draw your own

signature or upload an image. You can also use the **+ Add New** link to add

new names and signatures to your account, allowing people to send you documents for

signature using the additional names you specify.

l **Change your email address.** Your account email address is used to log in to DocuSign

and receive documents to sign. To enter a new email address for your DocuSign

account, click the **Edit** link. Once you change and verify your new email address, it is

linked to your DocuSign account and all of your sent and received documents.

l **Update your contact information.** Keep your company name, title, address, and phone

and fax information up to date. Use your privacy settings to control which details you

share with other users.

To add, edit, or delete personal contacts

If your permissions include the ability to create personal contacts, you can add and

manage them through your **My Preferences > Account > Contacts** view.

# Manage Notifications

DocuSign provides email notifications to senders and recipients for many different

scenarios. By default, all of the notifications are turned on. The Notifications preferences

give you control over the communications that you receive.

We know you're busy—you may not want to be notified every time an envelope that you sent

was viewed, or when another recipient reassigns an envelope to you. After all, everything

you need to know about an envelope, either as a sender or as a recipient, is visible from

your DocuSign account. The email notifications are just a convenience to let you know

about any change or activity.

To manage notifications

1. Go to **My Preferences > Signing and Sending > Notifications**.

# Manage Custom Fields

You can create custom versions of standard fields and save them for reuse on future

documents. Define any combination of field properties, such as font type or size, or a

validation setting. Custom fields help speed up your document preparation by allowing

you to save fields customized for your use.

You can also create custom fields directly in the Add Fields view, when you apply recipient

fields to a document. The custom fields you create there, appear in the Custom Fields list in

Preferences.