

DOCUSIGN INSTRUCTIONS

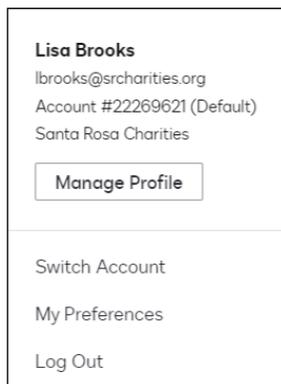
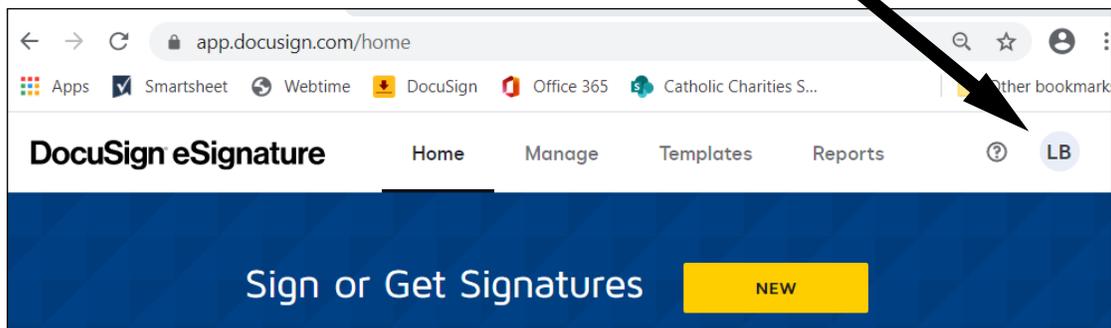
DocuSign is used to obtain signatures on documents. You upload your documents to DocuSign, prepare them for signing, and manage the signed documents.

You can view a video tutorial for DocuSign at <https://www.youtube.com/watch?v=HAV-nw9tYuc>

Access DocuSign at <https://account.docusign.com>

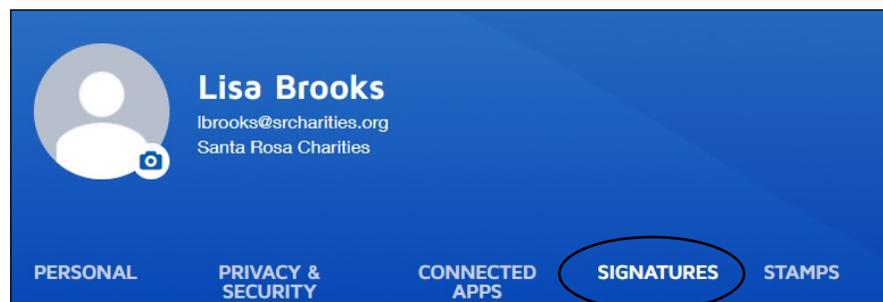
YOUR ACCOUNT PREFERENCES

When you sign in the Home page will be displayed. Click on your account icon.



To update your personal profile information click on **Manage Profile**.

To create your DocuSign signature, click on **Signatures** and then click on **+Add New**. You can choose one of the preformatted styles, upload image files or draw your signature directly.



Close the Profile page when you are finished updating your preferences.

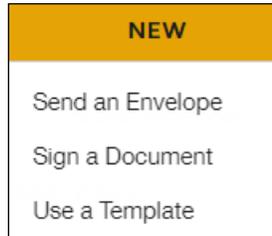
ENVELOPES

Documents are uploaded to an Envelope in DocuSign. You can upload documents from the Home page or the Manage page.

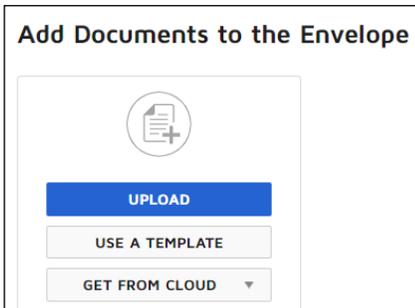
Click on the yellow **NEW** button



Select **Send an Envelope**



ADDING DOCUMENTS TO THE ENVELOPE



Click on the blue **UPLOAD** button to select your document. You'll be able to select documents from your computer and the network drives. Click **Open** to upload your document. Multiple documents can be uploaded.

To upload documents from the One Drive select **GET FROM CLOUD**.

ADD RECIPIENTS

Add recipients to the Envelope by typing in their name and email address. Once you enter a recipient they will be added to your contact list and you can use the Add from Contacts button. You can add yourself as a signor.

If you have more than one signor click on the **ADD RECIPIENT** button. To set the signing order for multiple signors select the **Set signing order** box. To add a recipient who only receives a copy of the signed document, use the **NEEDS TO SIGN** dropdown and select **Receives a Copy**.

To send a private message to a signor use the **MORE** dropdown.

A screenshot of the 'Add Recipients to the Envelope' form. The title is 'Add Recipients to the Envelope'. Below the title is a note: 'As the sender, you automatically receive a copy of the completed envelope.' There is a checkbox labeled 'Set signing order'. Below this are two input fields: 'Name *' and 'Email *'. To the right of the 'Name' field are two dropdown menus: 'NEEDS TO SIGN' and 'MORE'. At the bottom of the form is a button labeled 'ADD RECIPIENT' with a plus sign and a person icon.

MESSAGE TO ALL RECIPIENTS

Message to All Recipients

Email Subject*

Purchase Order for Rural Food Distribution Supplies

Characters remaining: 49

Email Message

As discussed, the supplies on this Purchase Order are requests by the Rural Food Distribution Team.
Thanks!

Characters remaining: 9893

Advanced Options | Edit

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires
- Senders can use either quick send or advanced edit

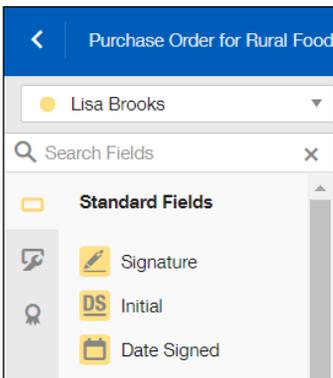
DocuSign populates the Email Subject with a default. You can modify the Email subject and enter an Email Message for the Signors. **Advanced Options** include the auto send of reminders.

SEND NOW

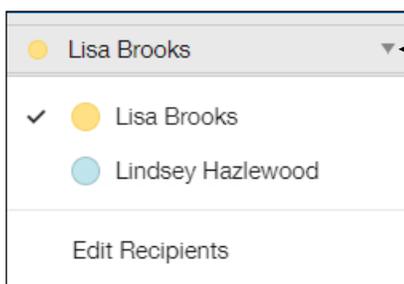
NEXT

Press the Yellow **NEXT** button to continue.

PLACING FIELDS ON DOCUMENT



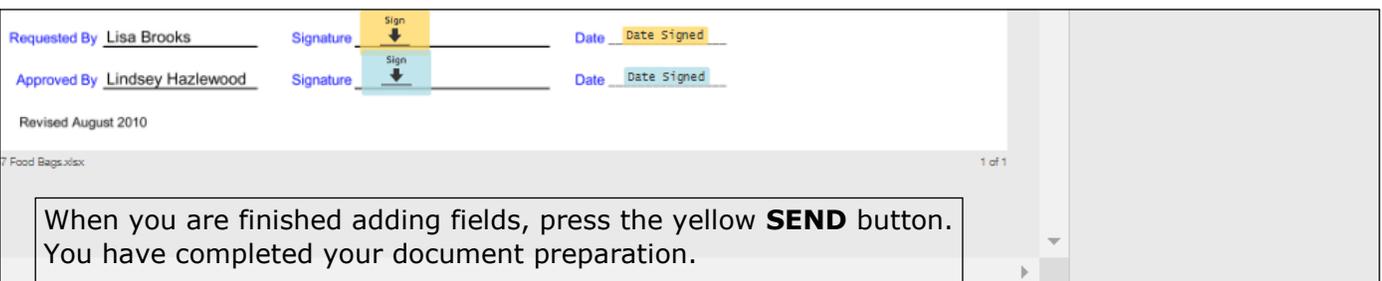
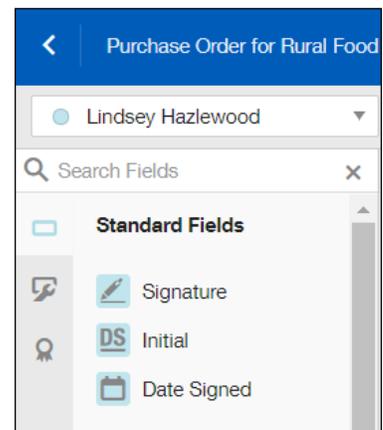
The first signor's name appears above the **Standard Fields**. To move a field, such as Signature, click down and drag it to the signature line of the document. Repeat for the other required fields for your document.



To select the next signor, click on the drop down next to the first signor's name.

Drag the required fields to the document.

Fields are color-coded for each signor.



When you are finished adding fields, press the yellow **SEND** button. You have completed your document preparation.

Click on your Account icon to use the Log Out option.

BACK

SEND

DOCUMENT SIGNING

The designated signors will receive an email from you via DocuSign. The email has a **REVIEW DOCUMENT** box. Clicking on the box opens a webpage where the signor can review the document. The webpage will direct the signor to the **Sign** flag you added to the document. Clicking on the **Sign** flag will add their signature.

If the envelope has a signing order for multiple signors, you will receive an email from DocuSign when each signor reviews and signs the document. When the final person has signed, you will receive an email with Completed: at the beginning of the subject.

You can click on the **Review Completed Document** box in the email and DocuSign will open with your completed document. You can print your document from this page.

TRACKING DOCUSIGN ENVELOPES

You can track your envelopes from the **Home** or **Manage** page in DocuSign.

The **Waiting for Others** view will display the envelopes waiting to be signed. You can hover your mouse on the **Waiting for Others** text in the **Status** column to see who has not signed. You have the option to resend the envelope.

The **Completed** view will display the envelopes that have been signed. You can access completed documents by clicking on the **Subject** of the envelope.

LOGGING OUT

Click on your Account icon to use the Log Out option.