

eSignature Basics for Senders

2022-02-28

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Table of Contents

Welcome to DocuSign.	5
System Requirements.	6
Supported Languages.	7
Log in to Your DocuSign Account.	9
Get to know DocuSign eSignature.	9
Sending Documents for Signature.	12
Start an Envelope.	13
Add Documents to an Envelope.	15
To add a document to an envelope.	16
Add Recipients.	17
Add recipients.	17
Use the Contacts list to add recipients.	19
Set a Signing Order.	21
To specify a signing order and view order diagram.	21
Add Messages.	24
Add a message to all recipients.	24
Add private messages to individual recipients.	25
Remove a private message.	26
Add Fields to Documents.	26
To add fields to a document.	28
To align fields.	28
Related topics.	29
Field Types.	29
Field Properties.	35
Basic properties.	35
To edit field properties.	36
Read Only Fields.	36
Field types with a read-only option.	37
To add read-only fields to a document.	37
Visibility of read-only fields.	38
Optional Fields.	38
Field types with a required option.	38
How to tell the difference between required and optional fields.	39

To make a field optional.....	39
Preview and Send.....	40
Sign a Document From Your Account.....	42
The Signing Experience.....	42

Welcome to DocuSign

Take a video tour of the DocuSign eSignature application. Get contact information for Customer Support and the DocuSign Community.

Welcome to DocuSign eSignature, the leading eSignature solution. DocuSign's cloud-based platform for automating the agreement process enables more than 370,000 companies and hundreds of millions of users in over 180 countries to accelerate business and simplify life.

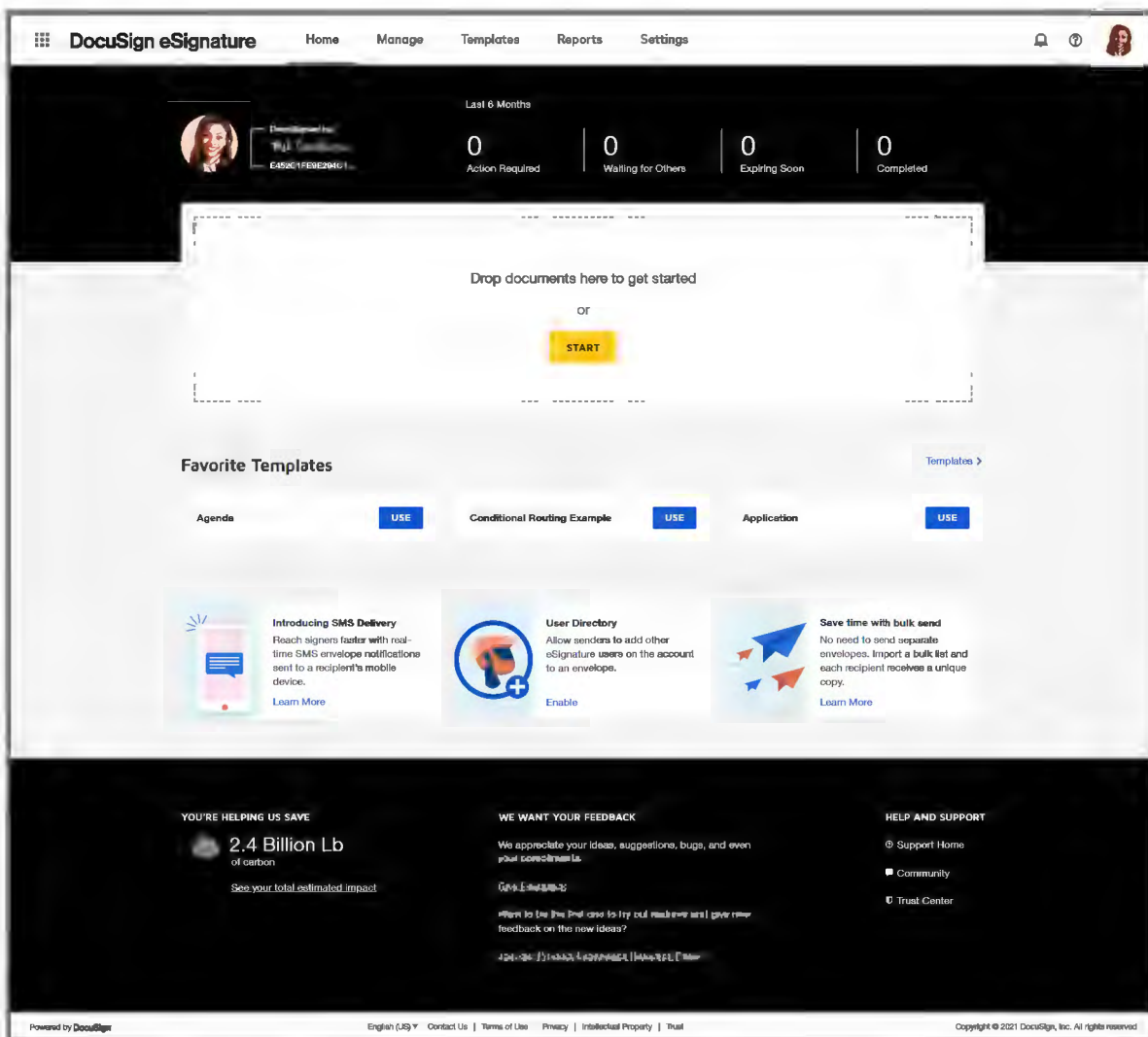
Get started with a video tour

Looking for a preview of how to use DocuSign? Get started with our introductory videos covering how to send and manage your documents, and how to create and use templates:

- Sending Documents for Signature—[watch video](#)
- Managing Your DocuSign Transactions—[watch video](#)
- Templates—[watch video](#)
- The Signing Experience for Recipients—[watch video](#)
- Sign a Document Yourself—[watch video](#)

Continuous improvement

Keep up with the latest news on the Home page and read about the new features and upcoming enhancements.



Help us help you

DocuSign is committed to your success. Tell us how we can do a better job:

- **Product feedback:** Send your product ideas to feedback@docusign.com.
- **Online help:** For feedback about this help system, use the **Send feedback...** link available on any topic page.

Here are some other resources to help you:

- **DocuSign Community:** Visit the [DocuSign Community](#) and connect with other users and share best practices.
- **Contact Support:** Need help? Visit our [Contact Support](#) web page for contact options to reach Customer Support.
- **Download a PDF of this guide:** Prefer PDF? [Download a PDF](#) of the complete DocuSign eSignature User Guide.

System Requirements

This topic provides the minimum system requirements needed to use DocuSign.

Most modern computers will work just fine with DocuSign eSignature. But just to be thorough, this topic provides the minimum system requirements needed to enjoy the DocuSign eSignature experience.

Supported Browsers

DocuSign eSignature supports the latest stable release (except where noted) of the following browsers:

			
Chrome	Firefox	Safari	Microsoft Edge

Screen Resolution

- 1024 x 768 minimum (for desktops and laptops)

Security

- Allow per session cookies
- Users accessing the Internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection
- Firewall settings must allow access to the following server: <https://docucdn-a.akamaihd.net>. DocuSign leverages Akamai as a content delivery service to enhance our application's performance.

Supported Languages

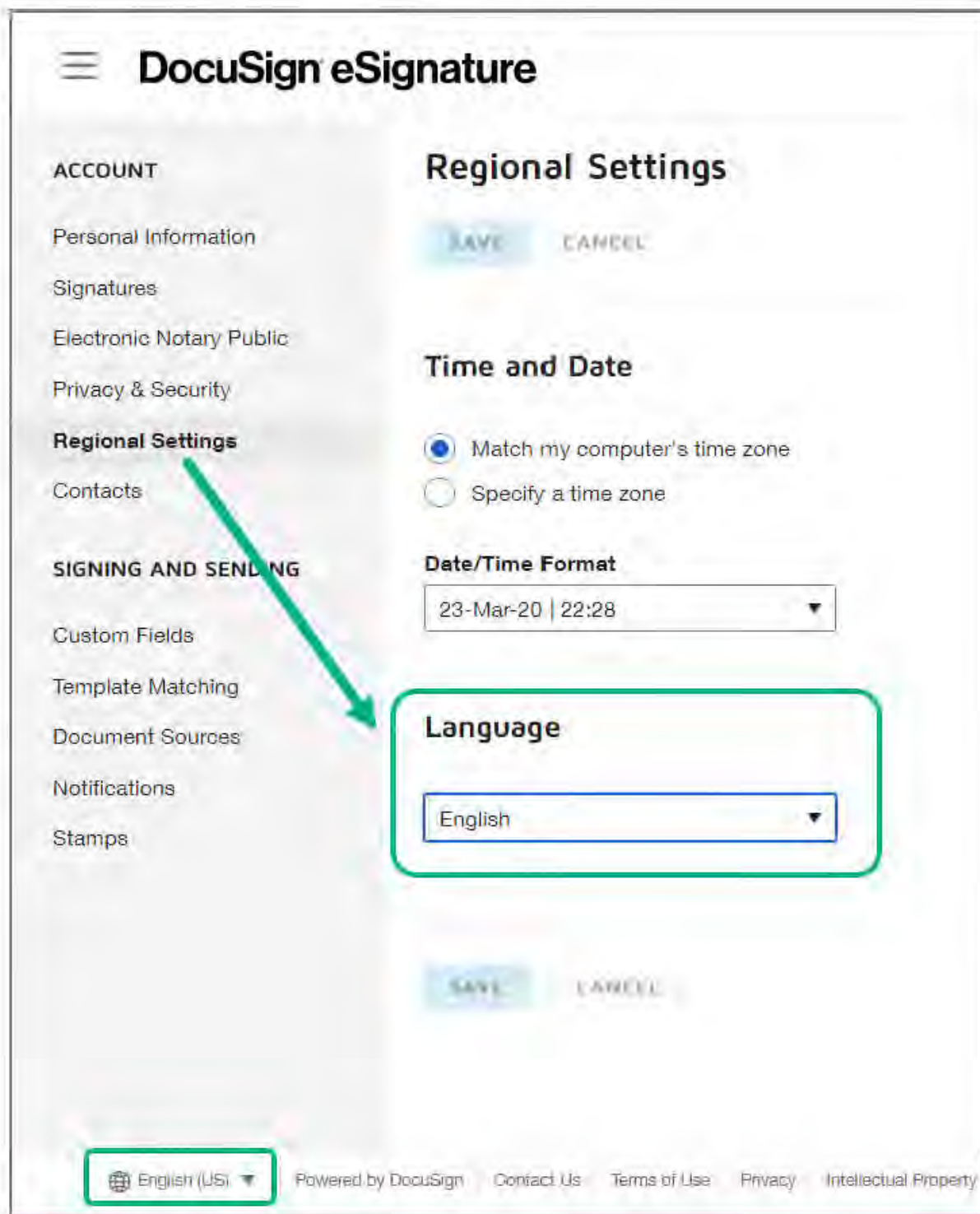
DocuSign eSignature supports 14 languages for account holders using the application.

DocuSign eSignature is available in the following 14 languages, making it easy for global users to send documents for signature in their native language:

- English (U.S.)
- Chinese Simplified
- Chinese Traditional
- Dutch
- French
- German
- Italian
- Japanese
- Korean
- Polish
- Portuguese (Brazil)

- Portuguese (Portugal)
- Russian
- Spanish

You can set the display language for your DocuSign account through the [My Preferences](#) view, or from the selection menu at the bottom of every page in the application.



For account users, administrators can also set the display language for all users through the administration view. [Learn more...](#)

For signers, DocuSign supports 43 localized languages, as listed on our [Global Business Standard](#) web page. Languages are detected through the signers' browser settings.

Log in to Your DocuSign Account

Read about how to log in to your DocuSign account.

You can log in to your DocuSign eSignature production account with your email address and password. If you have trouble logging in, see [I am having trouble logging in](#).

1. Go to <https://account.docusign.com/>.

Note: To access a DEMO account, go to <https://account-d.docusign.com/>.

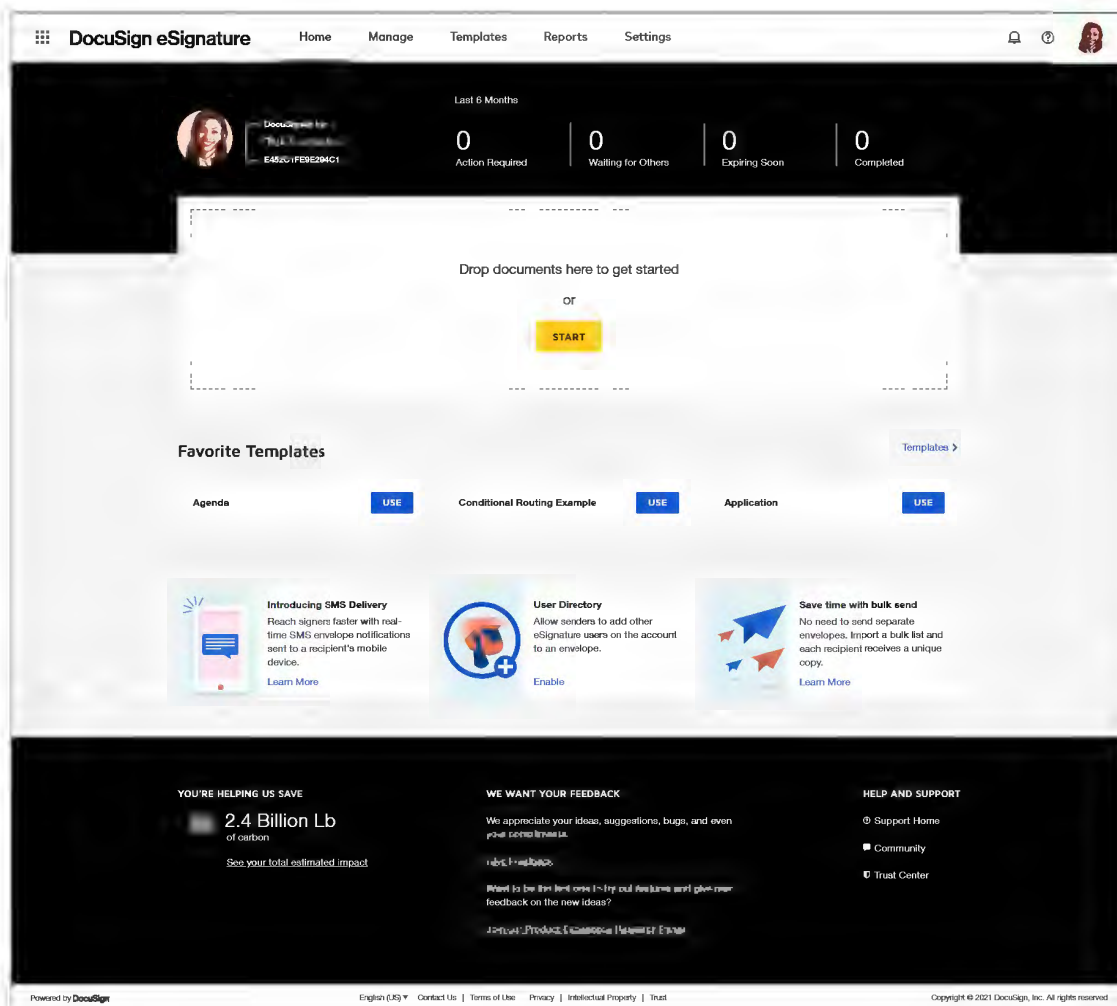
2. Enter the email address for your account and select CONTINUE.
3. Enter your account password and select LOG IN.
If you don't know your password, you can use the [Forgot password](#) link to reset your password.

Get to know DocuSign eSignature

This topic provides an overview of the main areas in the DocuSign eSignature web application.

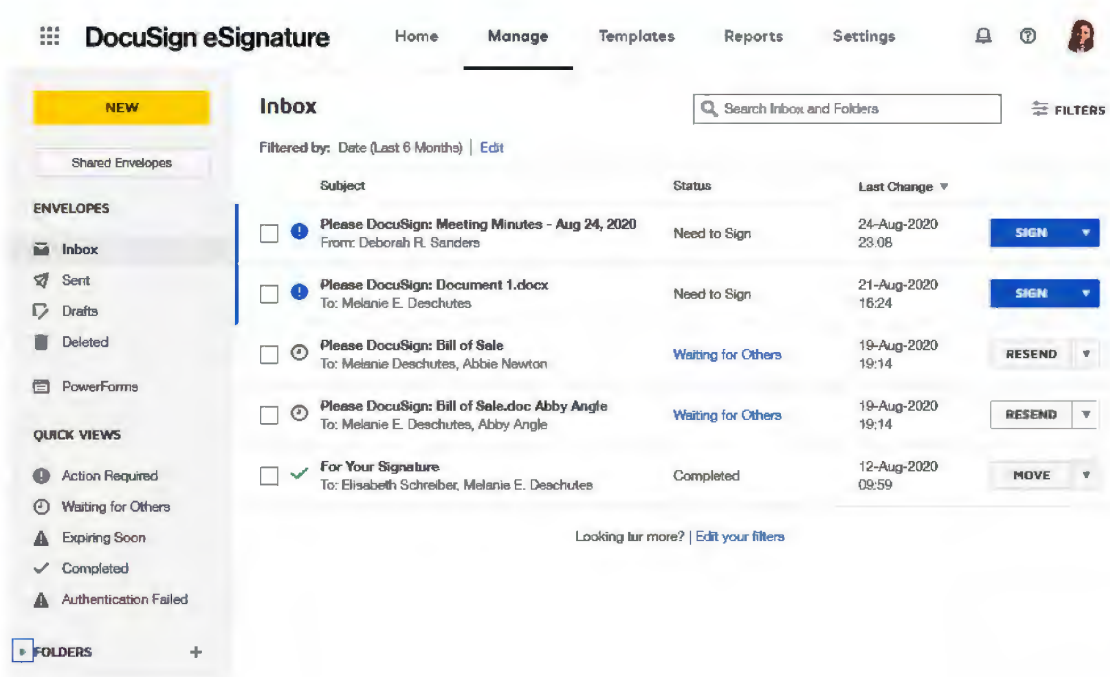
There are five main areas in DocuSign eSignature:

- **Home** The Home page provides quick links to start a document transaction, use a favorite template, and see an overview of your envelopes' status. You can also learn about new features and find links to suggested knowledge topics and other important resources.

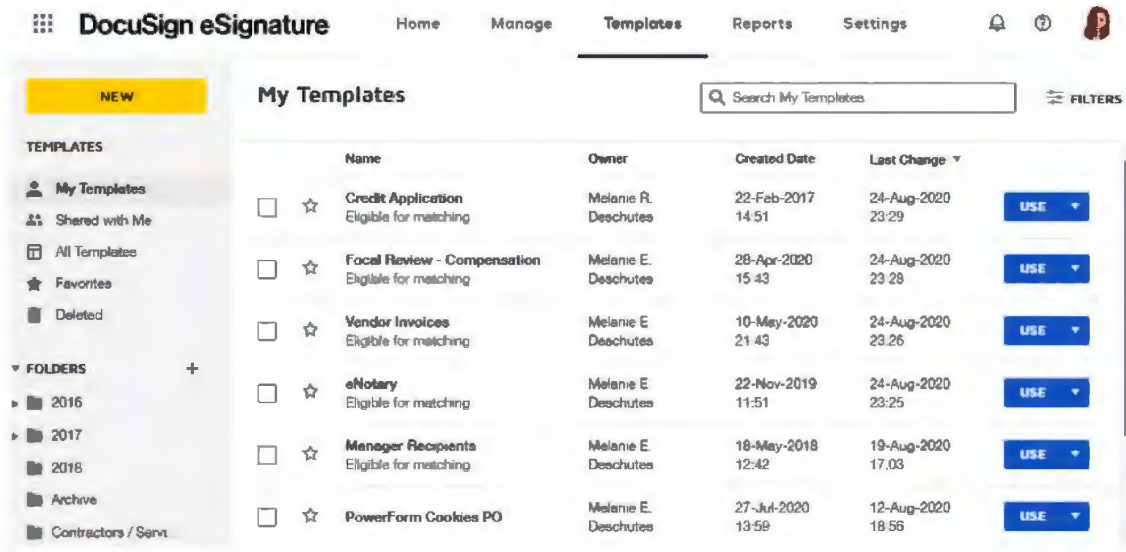


Sending an envelope from the Home page is quick and easy. You upload the documents you want signed and DocuSign combines them into a PDF. Then you specify who needs to sign and what kind of information they will add, such as a signature, initials, or their company name. See [Sending Documents for Signature](#).

- **Manage** The Manage page lists all of your envelopes. You can easily review status, access your files, create folders, search for a specific envelope, and perform additional actions, like resending or creating a copy. You can also start and send a new envelope from this page. See [Managing Envelopes](#) or [watch an introductory video](#).



- **Templates** The Templates page provides access to all of your saved templates. You can also create new templates from this page, or select a template to use to start and send a new envelope. See [Working with Templates](#) or [watch an introductory video](#).



- **Reports** The Reports page provides access to the standard reports on documents, recipients, and usage. You can view, edit, and download reports, as well as save customized reports for later use. See [Using Reports](#).

DocuSign eSignature Home Manage Templates **Reports** Settings

Search

18 Reports

TYPE	Name	Status	VIEW
All	Envelope Report All envelopes sent or received by me.	Scheduled Last Delivered 14-Jul-2020 00:05	VIEW
Envelope	Envelope Recipient Report Information about envelope recipients.		VIEW
Recipient			
Usage	Envelope Status Report Totals by status.	Scheduled Last Delivered 24-Aug-2020 01:05	VIEW
Custom	Envelope Velocity Report Envelope completion time.	Scheduled Last Delivered 12-Aug-2020 00:07	VIEW
Downloads	Envelope Volume Report Status totals for specified time periods.		VIEW

- **My Preferences** In My Preferences, you manage various account preferences, such as your language and date and time settings, saved contacts, and application settings for sending and signing, including notifications, document sources, and custom fields. See [Preferences](#).

DocuSign eSignature Home Manage Templates Reports **Settings**

ACCOUNT

General Settings SAVE CANCEL

General
Notary Public
Regional Settings
Contacts

SIGNING AND SENDING
Custom Fields
Template Matching
Document Sources
Notifications
Stamps

Your Default eSignature Account
Deschutes Properties, LLC (#349515) [Default]
[Switch Accounts](#)

DocuSign ID Card
This is what other DocuSign users will be able to see.

Melanie Deschutes
melanie.deschutes@gmail.com
DocuSigned by:
Mel Deschutes
e492c1fe-9a29-4c1...

Company
Owner
Deschutes Properties, Inc. #
123 Danser Blvd
Hanson, WV 24701
United States

Melanie Deschutes
melanie.deschutes@gmail.com
Account #349515 (Default)
Deschutes Properties, LLC
[Manage Profile](#)

Switch Account
My Preferences
Log Out

ID Card Privacy Settings
 Show my ID card to other DocuSign users

Display these items on my ID card
 Company and title
 Address and phone number
 Show signing and sending summary

Sending Documents for Signature

How to send a document to others to get their signature.

With DocuSign eSignature, getting signatures on a document is quick and easy. You upload the documents you want signed. Then you add the contact information for the people who need to sign and what kind of information they will add, such as a signature, initials, or their company name.

Note: if you just need to sign a document yourself (no one else needs to sign), then follow the steps in [Sign a Document From Your Account](#).

Sending Documents Video

Here's a two minute video on sending documents to get you started:

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 eSignature, or finish a previously saved draft.
2. **Add your documents.** DocuSign eSignature 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.
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.

If you include yourself as a signer, after you send the envelope, you can start the signing process from within your account. See [Sign Documents in Your Account](#) for details.

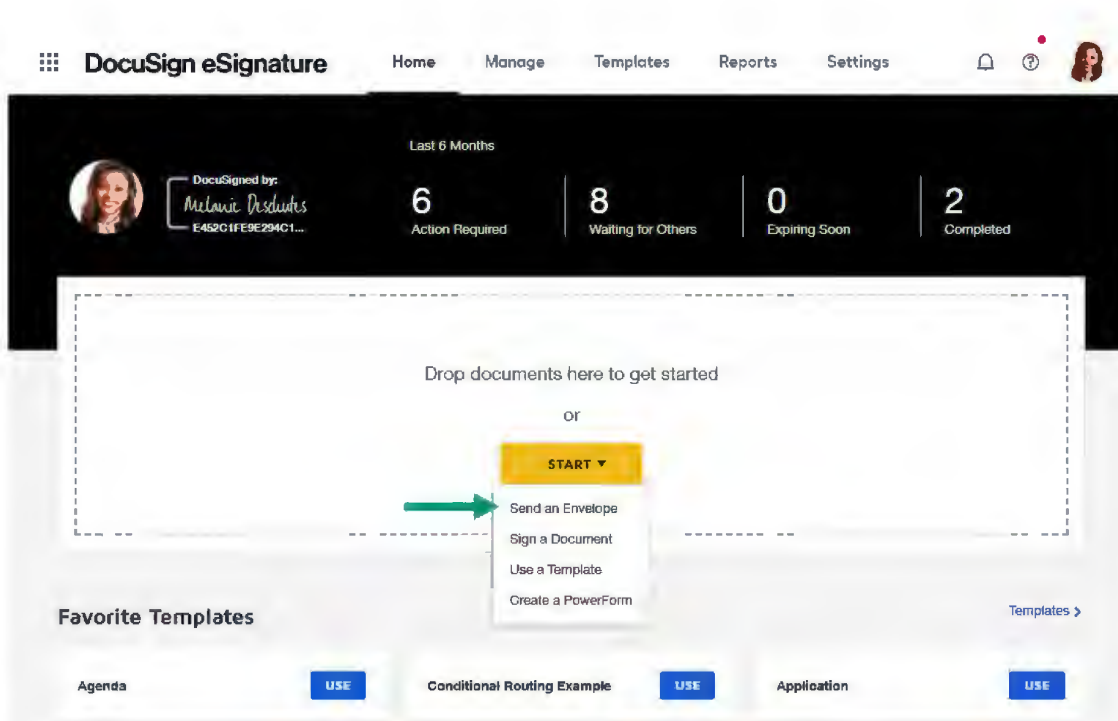
Using Templates

When you've mastered the basics, check out [Working with Templates](#).

Start an Envelope

To get signatures from other people, you start an envelope in either of the following ways:

- From the Home page, click START and select Send an Envelope.
- From the Manage page, click NEW and select Send an Envelope.



The Prepare view appears.

Upload a Document and Add Envelope Recipients

ACTIONS RECIPIENT PREVIEW NEXT

Add Documents to the Envelope

UPLOAD
USE A TEMPLATE
GET FROM CLOUD

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

ADD FROM CONTACTS SIGNING ORDER

Import a bulk list. Send copies of this envelope to many people at once.

Set signing order

Name * NEEDS TO SIGN CUSTOMIZE
Email *

ADD RECIPIENT ADD CONDITIONAL RECIPIENT

Envelope Custom Fields

April Custom Field Optional April Custom Field

Message to All Recipients

Custom email and language for each recipient

Email Subject*
Please DocuSign:
Characters remaining: 100

Email Message
Enter Message
Characters remaining: 10000

Advanced Options | Edit

- Recipients can view documents more easily on mobile devices with responsive signing **NEW**
- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 66 days after send date
- Recipients are warned 3 day(s) before request expires
- Comments are enabled
- Senders can use either quick send or advanced edit

SEND NOW NEXT

Next steps

[Add Documents to an Envelope](#)

Add Documents to an Envelope

Upload the files for your recipients to review and sign. Add files from your local machine or a cloud storage provider, such as Google Drive.

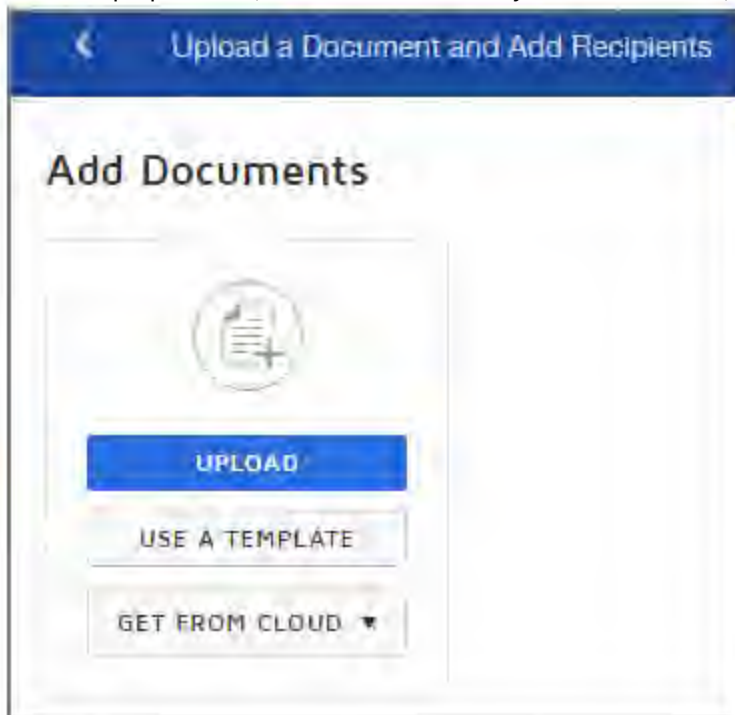
Once you start an envelope, you add the documents you want your recipients to review and sign electronically. DocuSign eSignature supports a wide variety of [file formats](#), covering the popular document, presentation, image, drawing, and spreadsheet applications. When you add your files, DocuSign converts them to PDF format for sending and storage.

You can add documents that are stored on your local machine. Depending on your account settings, you may be able to add documents from an authorized cloud storage provider, such as Google Drive or Dropbox. Your DocuSign administrator controls which providers you can use. See "Document Sources" in [Sending Settings](#) for details.

To add a document to an envelope

File names are used to generate the default envelope name and are used when the documents are downloaded using the separate PDFs option.

1. Start a new envelope from NEW > Send an Envelope.
2. From the prepare view, to add a file stored on your local machine, click UPLOAD.



3. To add a file from one of your [authorized cloud storage providers](#), click the GET FROM CLOUD drop down and select the provider. Then select your files, and click ADD SELECTED.

Note: Your account administrator controls which providers are available in the GET FROM CLOUD menu for you to select. If you do not see the GET FROM CLOUD option at all, your administrator has disabled the feature.

Add Recipients

Add the recipients who will receive your document. Set a signing order to control the order in which they receive your document.

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.

What actions can you assign to recipients?

You can assign different actions to the recipients of your document, such as to sign or just receive a copy. Here's a two minute video on the different actions you can assign:

Note: The Needs to View recipient action is equivalent to the Acknowledge Receipt feature in the classic experience. Some recipient actions are available for select plans only and may not be included in your account.

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. If your account administrator enables sending the PDF with the completed email notification, and you [opt to receive the completed email notification](#), then you will receive an emailed copy of your documents once all recipients have completed signing.

If you do not need to sign the document, then there is no need to add yourself as a recipient. You can always view or download the completed documents from within your DocuSign account, or use the copy sent to you with the completed email notification.

Add recipients

Learn how to add the people who will sign or take other actions on your documents.

Add the people who will act on or receive a copy of your documents. You can specify a signing order, require additional authentication, and set other options.

1. From the prepare view, enter the email address and name of your first recipient.

Note: To add a fax recipient, see the guide [Fax Documents for Signature](#).

2. To set the appropriate action for the recipient, choose one of the following from the drop-down list:

Document recipients:

- **Needs to Sign** - recipient must complete the required fields assigned to them, such as, signature, initial, and date.
- **In Person Signer** - a DocuSign account holder hosts the signing session for the recipient. [Learn more...](#)
- **Receives a Copy** - recipient receives a copy, with no further action required.
- **Needs to View** - recipient must open and view the document.

Manager recipients: [Learn more...](#)

- **Specify Recipients** - recipient can fill in the name and email address of the role recipients who are at their same position or later in the signing order.
- **Update Recipients** - recipient can edit recipient details for any remaining recipients in the signing order.
- **Allow to Edit** - recipient can make recipient and document changes (correct) to an in process envelope. This recipient must have a valid DocuSign account.

3. To add additional recipient rows, click ADD RECIPIENT.

Tip: To add yourself as a recipient on a document, type "@me" in the Name field. Or click in the Name field and then select your name and email in the pop up:

4. (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 a verification method:
 - a. In the recipient's row, click CUSTOMIZE and select Add identity verification.

The screenshot shows a recipient's information row for 'Melanie E. Deschutes' with email 'melanie.deschutes@gmail.com'. A 'CUSTOMIZE' dropdown menu is open, showing options: 'Add access code', 'Add identity verification' (highlighted with a blue box and a mouse cursor), 'Add private message', and 'Advanced settings'. The 'NEEDS TO SIGN' status is visible at the top right of the row.

- b. Select a verification method for the recipient and complete the required fields. [Learn more...](#)
The summary verification details appear below the recipient information.

The screenshot shows the recipient information row for 'Melanie E. Deschutes' with email 'melanie.deschutes@gmail.com'. The 'CUSTOMIZE' dropdown menu is closed, and a 'Knowledge-based' verification method is selected and highlighted with a green box below the email field. The 'NEEDS TO SIGN' status is visible at the top right.

Note: For enhanced security, you can add both an *access code* and an identity verification method (Phone Call, SMS, or Knowledge-based).

6. For Standards-Based Signatures accounts (SBS) only, select the signature type. For more information, see the SBS [signature types](#) and the list of supported [Trust Service Providers](#).

The screenshot shows the recipient information row with empty 'Name' and 'Email' fields. Below the fields is a 'Select signature type' dropdown menu. The dropdown is open, showing 'DS Electronic' selected. A green arrow points to the dropdown menu.

[Back to Top](#)

Use the Contacts list to add recipients

Your DocuSign eSignature account includes a [Contacts list](#). You can select recipients from your Contacts list to add to an envelope. Your [permission settings](#) control the types of contacts you have access to.

Note: If your permission settings allow you to create personal contacts, when you send an envelope, the recipients are added to your Contacts list automatically, so you only have to enter their information once.

To use the Contacts list to add recipients

1. From the prepare view, click Add From Contacts, located at the top right of the recipients.

2. Depending on your user permissions and account settings, you can search and select from the following categories of contacts:
 - **Address Book:** Depending on your permissions, your Address Book can contain personal contacts, contacts shared with you, and account signing groups.
 - **Directory:** Contains all active users on your account. DocuSign administrators always have Directory access; for other users, the feature must be enabled for your account by your DocuSign administrator.

	Name	Email	Company
<input type="checkbox"/>	Abbie Newton	abbie.newton@mailnesia.com	French Market
<input type="checkbox"/>	Abby Angle	angle@mailinator.com	Zynx, Inc.
<input type="checkbox"/>	Abigail Pfeiffer	apfeiffer@mailinator.com	
<input type="checkbox"/>	Alex Designs	alex.designs.sf@gmail.com	Alex Designs SF
<input type="checkbox"/>	Alex Designs	alex.designs.sf@gmail.com	Alex Designs SF

3. To add your contact selections to your envelope, click APPLY SELECTED.
The contacts you selected are added as recipients on your envelope with the default action Needs to Sign.
4. Adjust the action for each added recipient as needed to specify their responsibility for your envelope.

[Back to Top](#)

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.

The screenshot shows the 'Add Recipients to the Envelope' interface. At the top, there are two buttons: 'ADD FROM CONTACTS' and 'SIGNING ORDER'. Below these, there is a checkbox labeled 'Set signing order' which is checked. Underneath, there are two recipient entries, each with a 'Name' and 'Email' field. The first recipient is 'Abbigail Angle' with email 'angle@dsxtr.com'. The second recipient is 'Berg Werner' with email 'werner@dsxtr.com'. To the right of each recipient entry, there are two dropdown menus: 'NEEDS TO SIGN' and 'CUSTOMIZE'. The 'NEEDS TO SIGN' dropdown is set to 'NEEDS TO SIGN' and the 'CUSTOMIZE' dropdown is set to 'CUSTOMIZE'. There are also close buttons (X) next to each recipient entry.

With **Set signing order** enabled, you can specify a recipient routing order. 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.

When you use a signing order, you can route an envelope to the same person multiple times. For example, you want to send a purchase order to your manager to approve, then send it on to purchasing to sign, and finally send a copy to your manager again.

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

EXAMPLE – Sequential Routing

Let's say your independent contractor business sends Statement of Work (SOW) contracts for client approval. Your current client has two approvers: the project manager and the finance officer. You need the project manager to approve the contract before it goes to the finance officer for final approval. Once you have both approvals, you want to send a copy to your firm's accounting manager. With Set signing order turned on, you can set up this sequential routing so that your three recipients receive and execute your document one after the other.

To specify a signing order and view order diagram

1. From the prepare view, add your recipients.

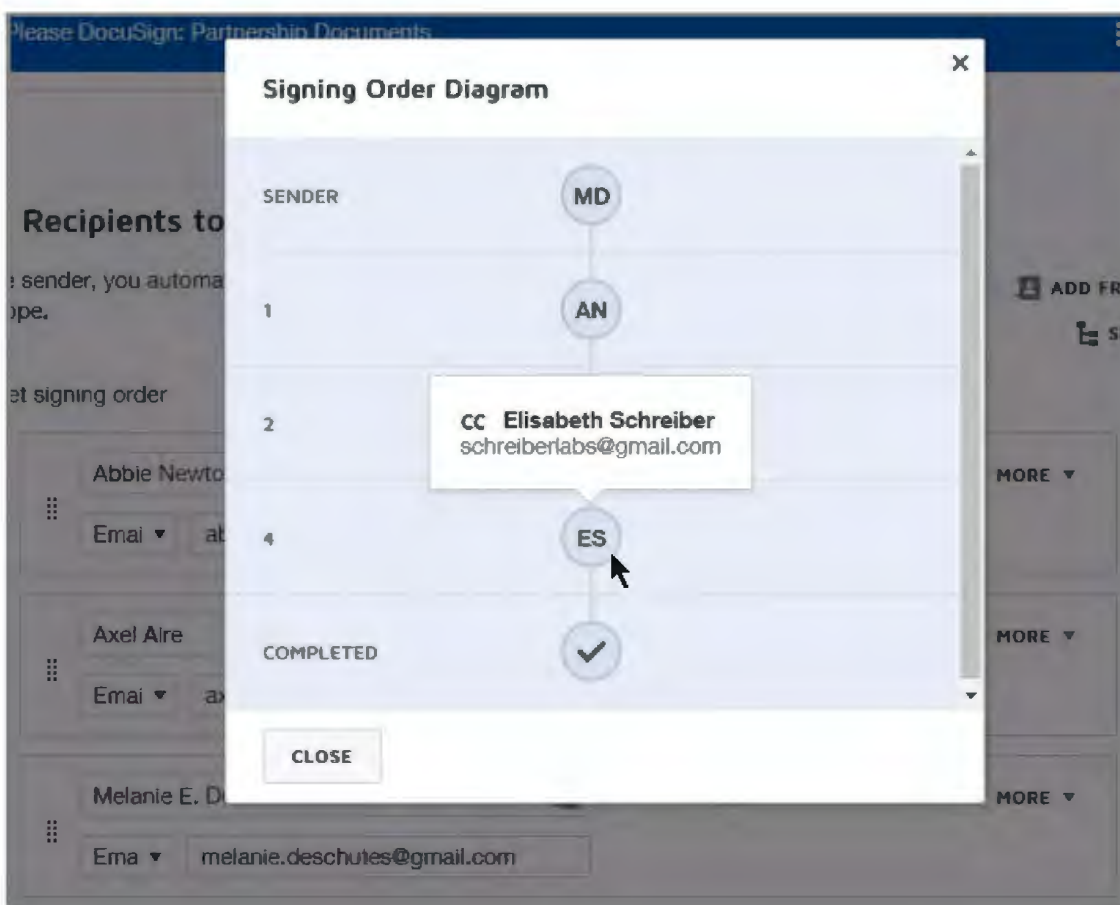
2. Select the **Set signing order** check box.
Signing order values appear at the left end of the recipient rows. By default, the signing order is the order in which you added the recipients.
3. To change the order, enter new values in the routing order boxes.

The screenshot displays a configuration window for recipient routing. On the left, a vertical column contains three input boxes for signing order values. The top box contains the number '1', and the two boxes below it contain the number '2'. A green rectangular box highlights these three input boxes, with an arrow pointing to the top-left corner. To the right of these boxes are three recipient entries, each consisting of a 'Name *' and an 'Email *' field. The first recipient is Abbigail Angle (angle@dsxtr.com), the second is Berg Werner (werner@dsxtr.com), and the third is Melanie E. Deschutes (melanie.deschutes@gmail.com). Each entry is separated by a vertical ellipsis icon.

Signing Order	Name *	Email *
1	Abbigail Angle	angle@dsxtr.com
2	Berg Werner	werner@dsxtr.com
2	Melanie E. Deschutes	melanie.deschutes@gmail.com

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:

In the order diagram, each recipient is represented by their initials, in accordance with their position in the signing order. Hover over each recipient circle to see more details.



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

- **White** - recipient is next in line to sign
- **Gray** - recipients awaiting their turn to sign
- **Green** - recipient has completed signing
- **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).

Check email address and [correct](#) as needed); "Declined to Sign" (includes recipient's reason for not signing); "Failed Authentication" (recipient did not pass the authentication).

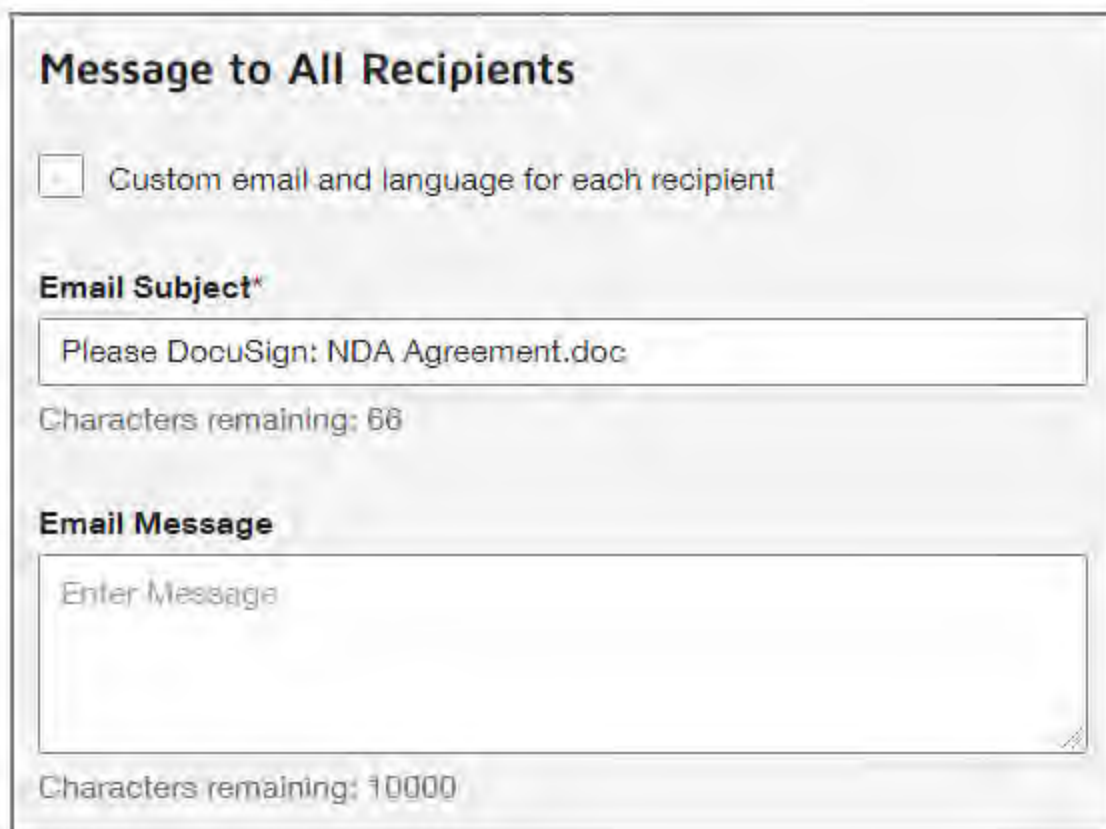
Add Messages

Include a message to your document recipients. You can create a group message to all, and private messages for individual recipients.

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.

Add a message to all recipients

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 field limit; additional characters are truncated. You can change the subject line to anything you like.



The screenshot shows a form titled "Message to All Recipients". At the top, there is a checkbox labeled "Custom email and language for each recipient" which is currently unchecked. Below this is the "Email Subject*" field, which contains the text "Please DocuSign: NDA Agreement.doc". Underneath the subject field, it says "Characters remaining: 68". The "Email Message" field is a large text area containing the placeholder text "Enter Message". Below the message field, it says "Characters remaining: 10000".

All recipients see the message information. As the sender, you can see the message you added to a document on the [Details](#) view.

The email message fields have the following character limits:

- Email Subject: 100 characters
- Email Message: 10,000 characters

1. From the prepare view, in the Message to All Recipients section, accept the default subject line or edit as necessary.
The subject line is limited to 100 characters.

Important: This entry is used for both your email subject, and the envelope title. A meaningful subject communicates the nature of your documents. If you send the same documents 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.

2. Enter your message in the message field.
The message field is limited to 10,000 characters.

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.

The private message field is limited to 1,000 characters.

As the sender, you can see a private message you added to an envelope on the [Details](#) view.

To add a private message for one recipient

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

The screenshot shows the 'Add Recipients to the Envelope' interface. At the top, it says 'As the sender, you automatically receive a copy of the completed envelope.' Below that is a link for 'Import a bulk list' and a checkbox for 'Set signing order'. The main form has two input fields: 'Name *' with the value 'Melanie E. Deschutes' and 'Email *' with the value 'melanie.deschutes@gmail.com'. To the right of these fields are two buttons: 'NEEDS TO SIGN' and 'CUSTOMIZE'. Below the 'CUSTOMIZE' button is a list of options: 'Add access code', 'Add identity verification', 'Add private message' (which is highlighted with a green box), and 'Advanced settings'. At the bottom left of the form are two buttons: 'ADD RECIPIENT' and 'ADD CONDITIONAL RECIPIENT'.

The private message panel opens.

2. Enter your message text.
The private message field is limited to 1,000 characters.
3. Click Close.
The message panel collapses and shows a private message is added for the recipient.



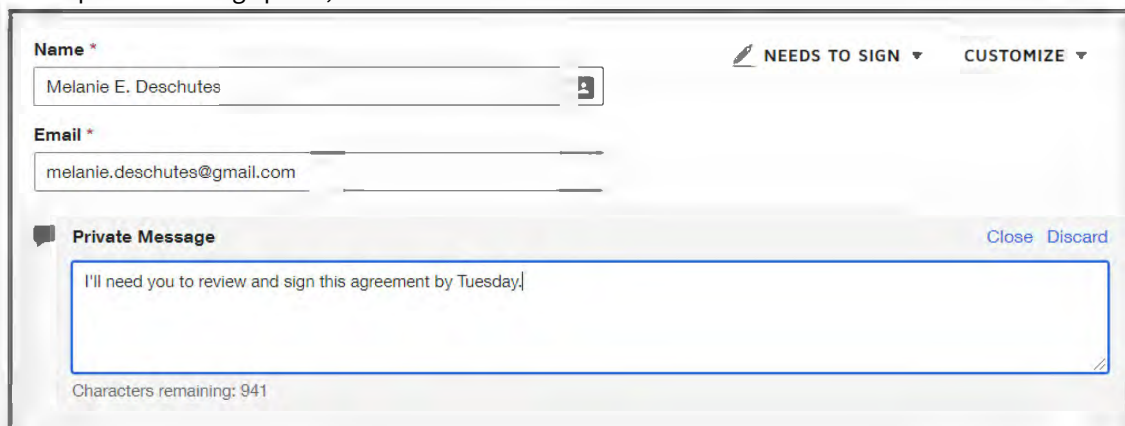
The screenshot shows a user interface for adding a signer. At the top, it says "Signer 2" and "NEEDS TO SIGN" with a dropdown arrow. Below that, there are two input fields: "Name" with the value "Johann Angle" and "Email" with the value "johann@dsxtr.com". At the bottom, there is a message icon and the text "Private message added".

Remove a private message

Learn how to remove a private message added for an envelope recipient.

You can remove a private message from a draft envelope, or when [correcting](#) an in process envelope.

1. In the recipient's row, click on the private message panel to expand it.
2. In the private message panel, click Discard.



The screenshot shows the "Private Message" panel expanded for a recipient. The recipient's name is "Melanie E. Deschutes" and the email is "melanie.deschutes@gmail.com". The "Private Message" panel is open, showing a text area with the message "I'll need you to review and sign this agreement by Tuesday." and a "Characters remaining: 941" indicator. There are "Close" and "Discard" buttons in the top right corner of the message panel.

The private message is removed.

Add Fields to Documents

Add the fields that instruct each of your signers where to provide their signature, initials, or other information.

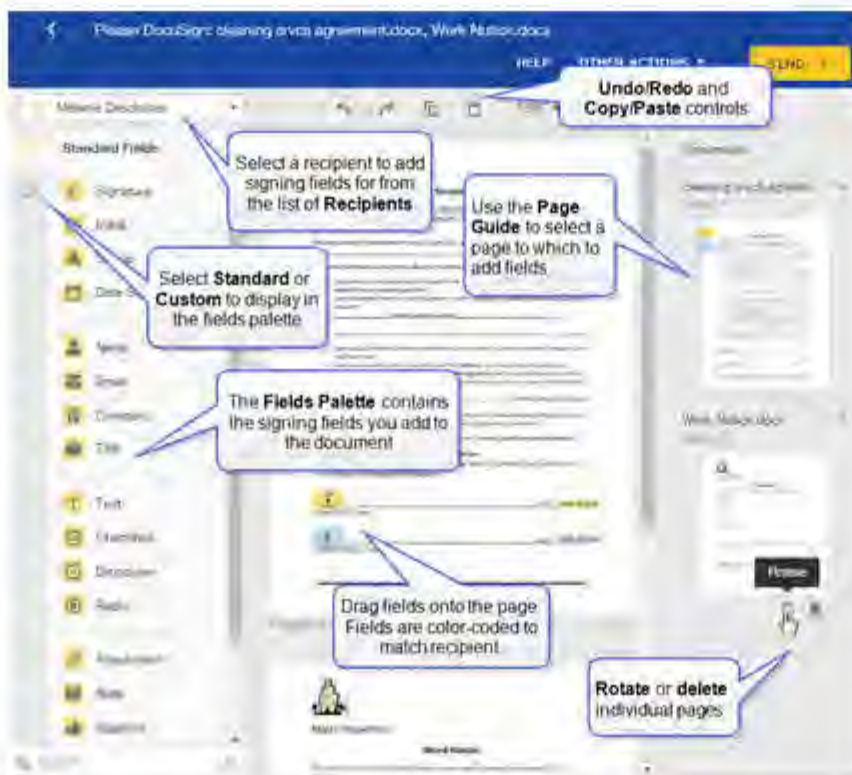
Once your envelope includes files, recipients, and messages, you add the fields that instruct your signers to provide their signature, initials, or other information. You add a unique set of signing fields for each recipient.

Note: If you find you cannot add fields to the documents and templates you create, most likely this is because of your user permission profile. Contact your DocuSign administrator and ask to adjust your permission settings. These settings are documented in [this administrator help guide](#).

Overview on adding fields

The Add Fields view has the following basic areas:

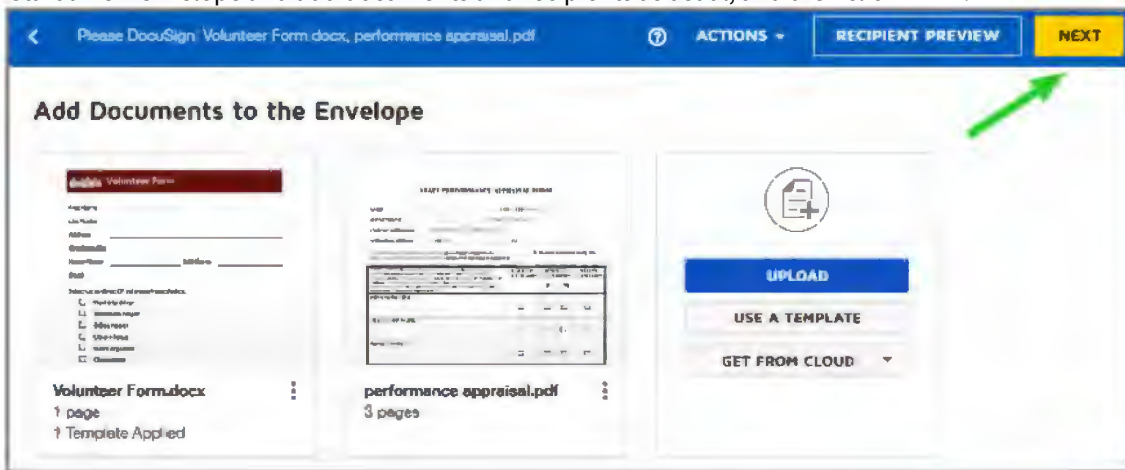
- **Recipients Lists** all of the recipients who will receive your documents to sign. The fields you add apply only to the selected recipient and are color-coded to match the recipient's assigned color. You can add fields for the recipients you designate as signers. Use the Edit Recipients option in the recipient list to edit details, or add or remove recipients.
- **Undo/Redo and Copy/Paste.** Icons for one-click access to these common field actions. Standard keyboard controls are also supported, as well as a right-click context menu for easy field management.
- **Standard Fields** Displays the set of standard fields you can add to your document. Select Custom Fields to use, add, or edit your custom fields.
- **Page Guide** Contains a scrolling list of all of the pages in your document. This list includes all of the pages of all of the files you added to the document. Click on any page in the Page Guide to make it the active page of your document. From the Page Guide, you can also delete and rotate individual pages from your documents and use ACTIONS to Edit Documents to add, remove, or reorder documents.
- **Field Properties (Not shown)** Contains the properties for a selected field or fields, allowing you to edit things like formatting, recipient assignment, and tool tips. This panel slides in over the Page Guide when one or more fields are selected.



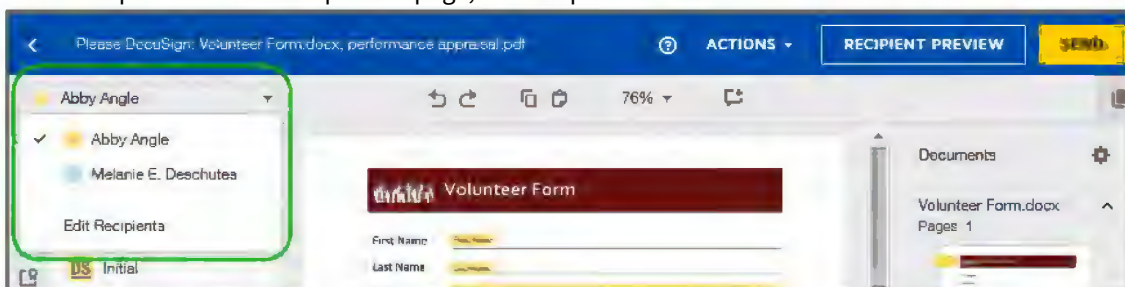
When recipients review your document, they navigate through the fields based on the Auto-Navigation setting for your account. Your DocuSign administrator [sets this option using the DocuSign eSignature Admin view](#). The default behavior is to navigate through all fields on the document. Alternate navigation options include Page only, where recipients scroll through documents manually, and Navigate Required Fields, which steps recipients through just the fields marked as required. If you use Radio Buttons on your documents, the options to navigate *blank required fields* are recommended for a smoother signing experience.

To add fields to a document

1. Start a new envelope and add documents and recipients as usual, and then click **NEXT**.



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

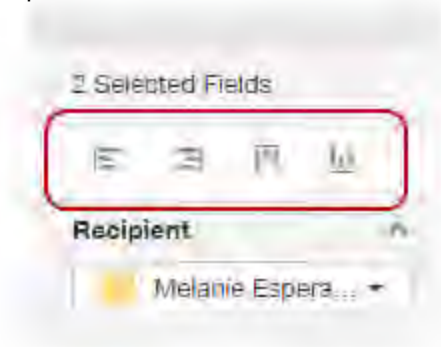


Note: The fields you add apply only to the selected recipient and are color-coded to match the recipient's color. You can only add fields for the recipients you designated as signers; you cannot add field for recipients who simply need to view or receive a copy only.

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. [Learn more...](#)
6. Use the page guide to scroll through the pages and add more fields for your recipient.

To align fields

- Select two or more fields (**SHIFT+Click** or click and drag), and use the alignment tools in the Field Properties panel.



Related topics

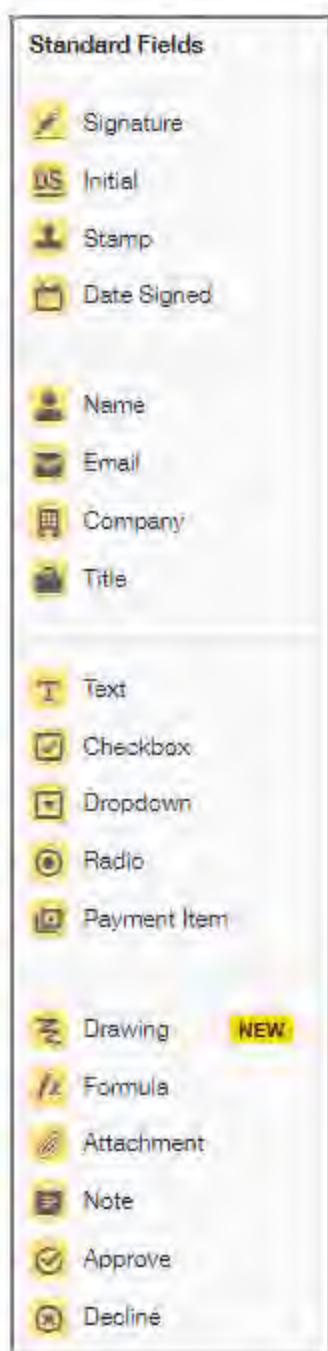
For more information on topics related to adding fields, see the following:

- [Shortcut Keys](#). Use keyboard commands for common actions on recipient fields.
- [AutoPlace fields](#). Use AutoPlace to add fields automatically by matching to characters in your document.
- [Resize fields](#). To adjust the size of a field, click and drag on any field corner.
- [Field types](#). Use the right field type for the information you want from recipients.
- [Field properties](#). Control the appearance and behavior of fields through the available field properties.
- [Sender permission field properties for templates](#). Protect the fields you add to your template from being changed or deleted.

Field Types

Depending on your account plan, there are many types of fields you can add to a document.

You can add the following standard fields to your documents:



Note: Some advanced features and options are supported only in certain DocuSign plans. Your account plan might not support some options discussed in this help topic. For more information about which options are available for your account, contact your account administrator or DocuSign Customer Support. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

EXAMPLE

Let's say you are sending a purchase agreement to a customer for a custom-built automobile. Your document details the vehicle specifications and the customer's contact information. You need the customer's initials on the specs,

requested delivery location, and signature. You use the Initial and Sign Here fields for their initials and signature, and the Text field for the delivery location.

Set field properties

Some fields automatically populate with the signer's data, while others require the signer to enter some information or make a choice. When you add fields to a document, you can define [field properties](#), such as font styling and character limits.

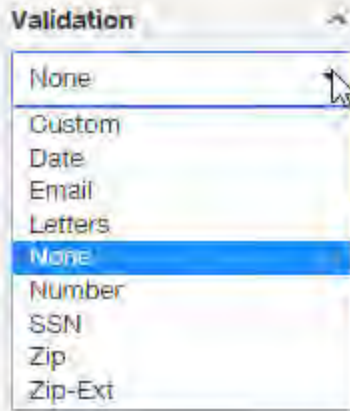
Adjust the field size

You can easily [adjust the size of your field](#); just click and drag on the any of the sizing handles at the corners of the field:



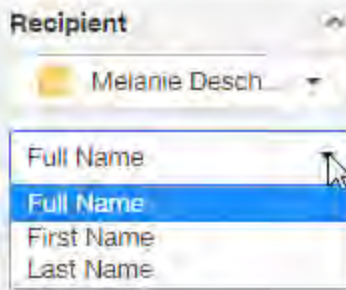
Types of fields

- **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
- **Initial.** Just like signing, new users first adopt a signature, and then their initials are applied to the document. Default: Required
- **Stamp.** The stamp field enables customers in varying markets, cultures, roles, and industry verticals to apply a stamped image to be representative of their signature, official approval, or company acknowledgment to documents. The stamp field cannot be resized by the sender. Recipients who have a stamp field to complete, upload a stamp image, size and position it, and adopt it to apply to a document. If the signer is a DocuSign account holder and has previously added a stamp, the stamp is available to select and apply to the document. Once a signer applies a stamp, they can resize it or replace it before they finish signing the document. Default: Required
The stamp field must be enabled for your account by your account administrator in the [Sending Settings](#).
- **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.
- **Text.** This is a free text field for data. By default, the text field accepts any characters. Enter a value in the Character Limit setting of the **Add Text** property to restrict the number of characters the recipient can enter. Set a **Formatting** property to hide text with asterisks, and conceal the signer's data entry from anyone viewing the document. Or select the Fixed Width option to restrict the field to a set size. Use the **Validation** property to [restrict the data entry in the field to a specific format](#), such as an email address or a social security number. Place the field on your document and select it. In the field properties pane, expand the **Validation** section, click the drop down, and select the validation format for the field.



Default: Required; Validation - None

- **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.

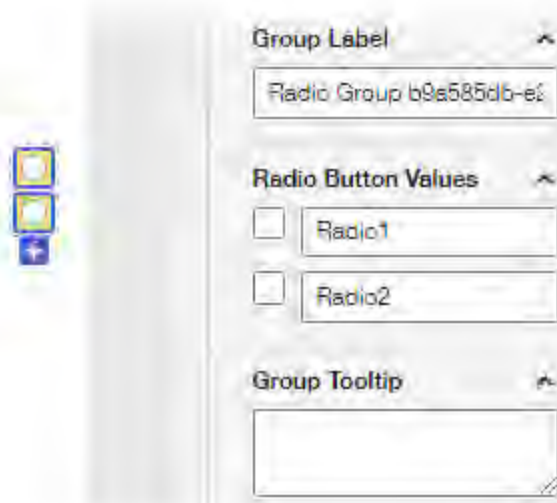


Depending on the format you choose, the field automatically populates with the recipient's name, or portion of the name, as you entered it when you added the recipient to your envelope. If the recipient changes their name when they adopt their signature, the Name field updates to reflect the new name. Default: Full Name

- **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.
- **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.
- **Email.** This field automatically populates with the recipient's email address.
- **Checkbox.** This is a standard, square box for recipients to select one or more options. You can add a single box or a group of multiple boxes. A checkbox group can include a validation rule to enforce how many checkboxes in the group your signer must select. Checkboxes can be required or optional, but if you apply validation that requires the signer to select a certain number of boxes, then the field becomes required. [Learn more...](#)

Tip: If you have a scenario where your recipient must mark to indicate explicit agreement, use a single checkbox and select the **Required Field** option.

- **Radio Buttons.** Radio buttons provide options from which recipients can select only one response. Radio buttons are placed as a group, and you can add, remove, or position the individual buttons. When you add a radio button field, the group contains two options. Click the "+" icon to add an option to the radio group.



Radio buttons have the following unique properties:

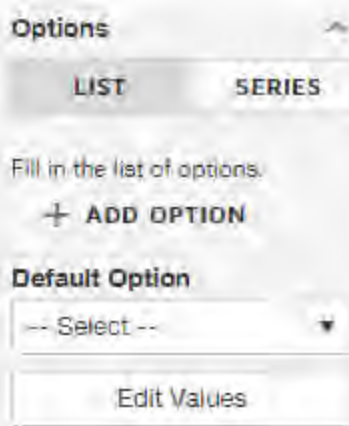
- **Group Label.** This label identifies the radio button group. It is not shown to recipients but is included with the envelope form data.
- **Radio Button Values.** Values for each radio button. These values are shown to recipients and the selected value is included when you [download form data](#) for the document. In order to collect meaningful data from radio button selections by the recipient, enter unique and representative values for each radio button. On the completed PDF, only the selected option remains, appearing as an "x". Default values: "Radio1" "Radio2"
- **Group Tooltip.** Add an optional tooltip text to show to recipients when they hover over or select a radio button.

Radio buttons, as a group, can be required or optional. If you set the **Required Field** property, your recipient must select one of the options in order to finish signing. Default: Required

If you have a scenario where your recipient must mark to indicate explicit agreement, use a single [checkbox](#) with validation.

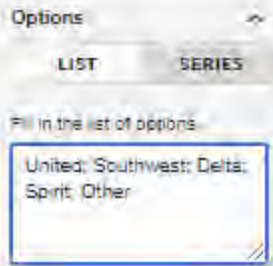
Tip: When recipients review your documents, they navigate through the fields based on the Auto-Navigation setting for your account. If you use radio buttons on your documents, the options to navigate *blank required fields* are recommended for a smoother signing experience. Your DocuSign administrator sets this option using the DocuSign eSignature Admin view. ([More Info](#))

- **Dropdown.** This field provides a drop down list of options. Like radio buttons, recipients can select only one value from the list. When you place the field, the **Options** section opens on the properties panel.



Create the options for your drop down list by selecting either LIST or SERIES:

- **LIST** - Create a list of options by selecting **+ ADD OPTION** and filling in the value. Do not use a semicolon (";") in an option value as this character is used to delineate options and would split the entry into separate options.
- **SERIES** - Enter a semicolon-separated list of values in the field provided. Example:



This list is what your recipient sees when signing your document.

The **Default Option** list populates with your list of values, and you can select which value to show in the field by default. You can set additional properties in the properties panel, such as formatting and whether or not the field is required.

The Drop Down field can be required or optional. If you set the Required Field property, your recipient must select one of the options in order to complete the document. Default: Required

- **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
- **Note.** The Note field is a free text field that you can use to enter additional information to your recipients. You can add a Note for an individual recipient and the text that you enter appears only during the signing session. Notes are visible only to their assigned recipient. Notes do not remain on the completed documents. However, you can use the [download form data](#) option to recall and view the information.
- **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.

- **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.
- **Formula.** This calculated field dynamically calculates a result based on recipient-entered values in other fields. You can [build formulas](#) based on numbers or dates, using the standard mathematical operations of addition, subtraction, multiplication, and division.
- **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

You set field properties to control the look and behavior of the fields you add to documents.

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

- Make a field required or optional
- Change the recipient for a field
- Enter data in the field and make it read only for recipients
- Apply data validation to enforce data entry rules for the recipient
- Set the font, size, or color for a text field
- Hide the recipient's entry in a text field with asterisks for added data security
- Set up conditional field relationships

The properties are similar for all of the field types, though not all properties apply to all fields. You can adjust the properties on a single field tag basis, or to multiple fields at once.

Basic properties

- **Recipient** - controls which recipient the field applies to; use this property to change the recipient for a field tag.
- **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. [Learn more...](#)

- **Add Text** - for text fields, you can enter the field contents to present to recipients. Apply the Read Only property if you want to protect your entry. Set a Character Limit to control how many characters recipients can enter into the field.
- **Read Only** - controls whether the recipient can edit the field; only the following fields have this property: Text, Company, Title, Dropdown, Checkbox, and Radio Button. As the sender, you can complete these fields and mark them as Read Only. All recipients see your entry or selection, but cannot change values. [Learn more...](#)
- **Formatting** - defines the font family, size, and color, and character styling. Your account administrator defines defaults for these settings, which you can change as needed for your document fields. [Learn more...](#)
 - 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. [Learn more...](#)
 - For signature and initials fields, there is a scale % property you can use to set the size of the field (50-100%).
- **Tooltip** - provides use tips that appear when the recipient mouses over the field. This property does not have a character limit. Use [Recipient Preview](#) to ensure your tooltip will display properly for signers.

To edit field properties

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

- 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.

Read Only Fields

For some field types, you can complete the fields and mark them as read only. All recipients can see the contents, but cannot modify the values.

For some field types, as the sender, you can complete the fields and mark them as read only for the recipients. The Read Only property locks a field from being changed by any recipient on the envelope.

Field types with a read-only option

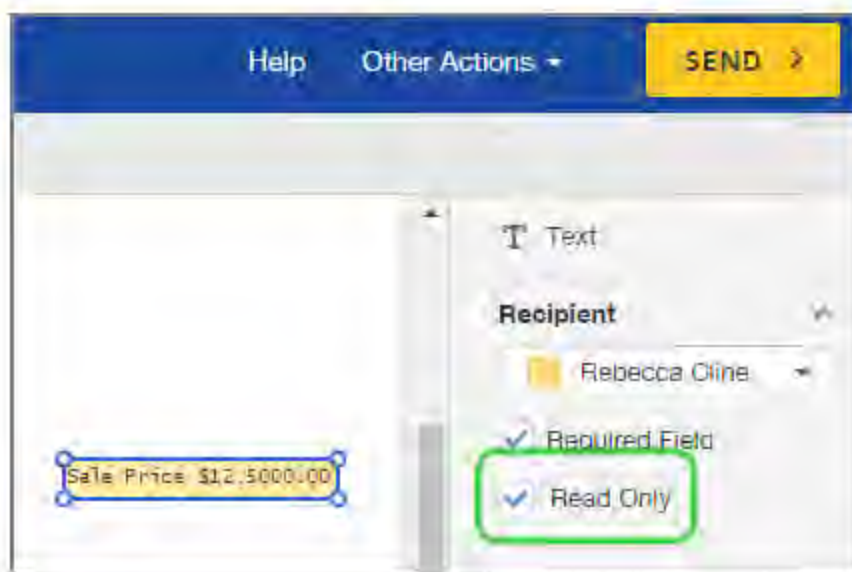
The following field types can be set to read only:

- Text
- Company
- Title
- Drop Down
- Checkbox
- Radio Button

Note: Even though you assign read-only fields to a single recipient, the fields and their contents may be seen by all recipients of the document. Read-only fields cannot be edited by recipients. See [Visibility of read-only fields](#) for more information.

To add read-only fields to a document

1. Prepare your envelope as usual, adding documents, recipients, and messages.
2. In the Add Fields view, click the Text field or other field type as appropriate, and place it on the active document page.
3. In the properties panel, set the desired value for the new field.
To determine who can see the value entered, see the section "[Visibility of read-only fields](#)".
4. In the properties panel, select the Read Only check box. For recipients, the field is now read only and cannot be changed. The field and the contents you specified will be visible to all recipients.



Visibility of read-only fields

There are a few factors that affect which envelope recipients can see the contents of read-only fields. In all cases, recipients cannot modify the read-only values.

- **Account setting to show values to all recipients.** Your account administrator can enable a setting to expose to all recipients any values you enter into fields prior to sending an envelope. See [Sending Settings](#) for more information.
- **Show read-only field values to all recipients.** If your account has not enabled the account setting to show values, you can set a signing order for your recipients and assign the read-only fields to the first recipient in the order.
- **Show read-only field values for recipients who have finished signing.** If you don't use a signing order, and the account setting to show values is not enabled, then recipients can see field values for any fields assigned to them, plus field values for any fields assigned to recipients who have already finished signing.

Optional Fields

You can place optional fields for your recipients to consider. Most often, you want to use an optional signature or initial field.

Sometimes you want to place optional fields for your recipients to consider. Most often, you want to use an optional signature or initial field. For example, a permission form with a signature to be completed only if the recipient wants to grant her permission. Or a series of line items in a service contract—the signer initials only those items they want in the final contract.

Field types with a required option

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

- Signature
- Initial
- Text
- Company
- Title
- Radio Button
- Drop Down
- 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 lists. Here's an example showing a required field on the left and an optional one on the right:



To make a field optional

1. Start an envelope as usual, adding documents, recipients, and messages.
2. In the Add Fields view, click one of the field types listed above and place it onto the document.
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.

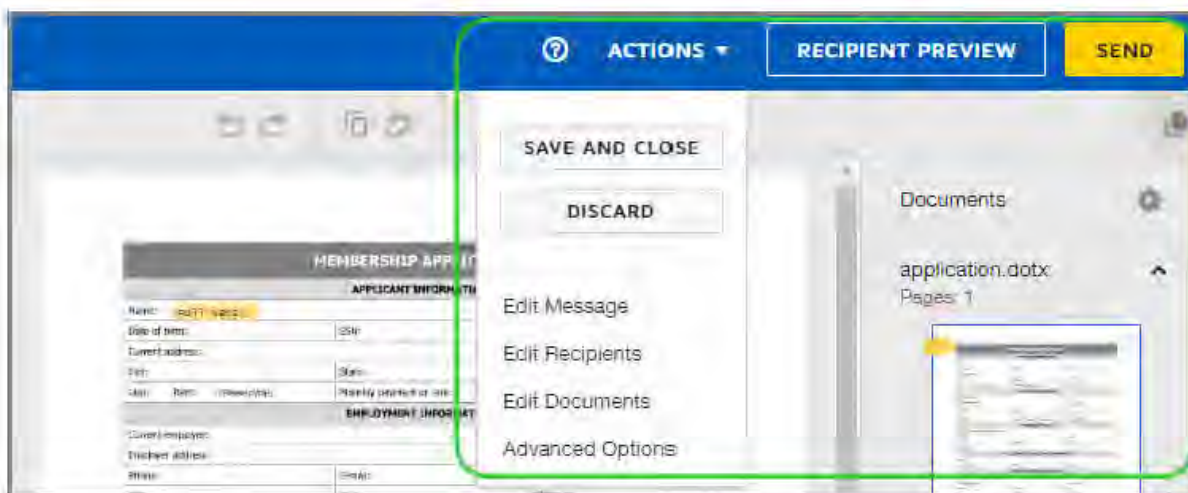


Preview and Send

Once you finish adding files, recipients, messages, and signing fields, you are ready to send your document for signature.

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:



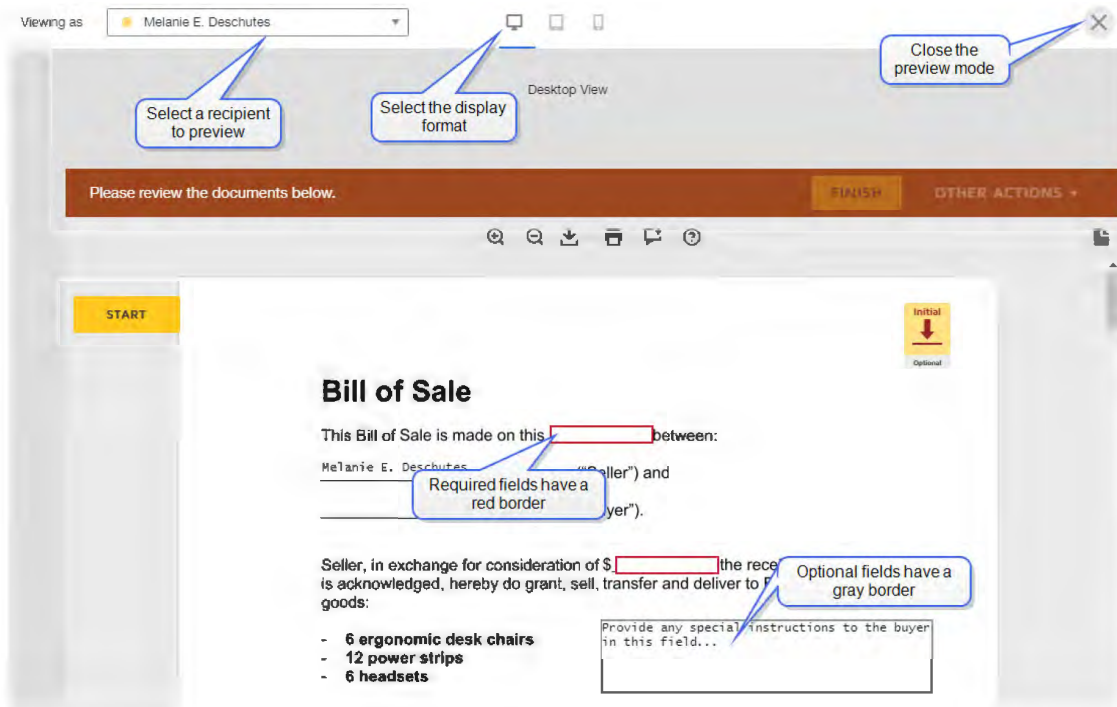
- To save a draft without sending, click ACTIONS and select SAVE AND CLOSE.
- To cancel the envelope preparation and return to your Manage page, click ACTIONS and select DISCARD.
- To preview your recipients' experience, click RECIPIENT PREVIEW.
- To send your envelope, click SEND.

Once you send your envelope, your recipients receive an email notification, asking them to review and sign. If you included yourself as a signer, you can start the signing process from within your account. See [Sign Documents In Your Account](#) for details.

Recipient preview mode

Preview mode offers a simplified view of each recipient's signing experience. You can use this mode to step through each recipient's fields.

- To preview your recipients' experience, click **RECIPIENT PREVIEW**.



- To check field entries, you can select radio button and dropdown values, or enter text.

Document 1 - Project Plan

Agreed? YES NO

Required

Document 3 - Beneficiary Form



Name of Beneficiary:

- To preview signature and initials placement, click the fields to see a dummy manifestation.



Sign a Document From Your Account

How to sign a document yourself, and then send it to anyone who needs to receive a copy.

Sometimes you want to just sign a document yourself—just you, no other signers. And maybe you want to send a copy of the signed document to others. This could be a document someone sends to you outside of DocuSign, or a form you need to fill out and send to someone. With the Sign a Document feature, you can quickly upload a document to your DocuSign account, sign it, and send the signed document to anyone who needs to receive a copy.

You can start a new document to sign from either the Home page or the Manage page.

Sign a Document Video

Here's a short video on signing documents yourself to get you started:

The Signing Experience

What is the signing experience? How does the signer DocuSign and complete your electronic signature transaction?

So you've put together your envelope and sent it off to the recipients for their signature. What is the signing experience? How do your documents appear to them? Where do the messages and fields you added show up and how does the signer DocuSign and complete your electronic signature transaction?

Signing experience video

Here's a short video demonstrating the signing experience to get you started:

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?](#)

Typical signing scenario

Now let's walk through a typical signing scenario:

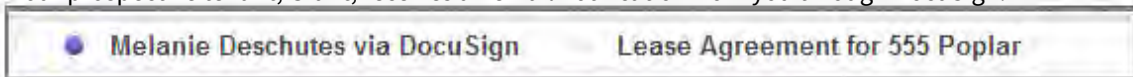
SCENARIO — Signing a Document

You manage a small apartment building and you have a new prospective tenant, Grant England. You prepare and send a rental agreement to Grant for his signature. You also send a Lead Paint Disclosure form, which Grant must acknowledge. You've got a waiting list for the open unit and if Grant's not going to take it, you need to move on to the next applicant, so you want the agreement completed within five days. You set document options to send a reminder to Grant every day, and you set an expiration date for the document for five days from today. You explain this deadline to Grant in your document message.

The building's owner, Lissa Burnky, wants copies of all completed rental agreements. You add Lissa as a copy only recipient to your document. You use the Sign in Order feature so that Lissa receives the document only after Grant signs it. You add a private note to Lissa, explaining that Grant passed the credit and reference checks.

Here are the steps in the signing experience for this scenario. Screen shots show you in detail what your recipients see.

1. Your prospective tenant, Grant, receives an email notification from you through DocuSign.



Grant opens the email.



The notification includes your photo, name, email, and company name. The subject of the email is the Email subject you entered in the Message. Grant decides he's not ready to sign the lease just yet.

2. A day later, Grant receives a reminder to sign your document, and now he's ready to sign the lease, Grant's ready to sign the lease, so he clicks the View Documents link. Even though Grant does not have a DocuSign account, he can view and sign your document.
3. The Request for Signature dialog appears. This dialog includes:
 - The files names of the lease and lead paint disclosure agreements which you included in your document
 - The Consumer disclosure statement

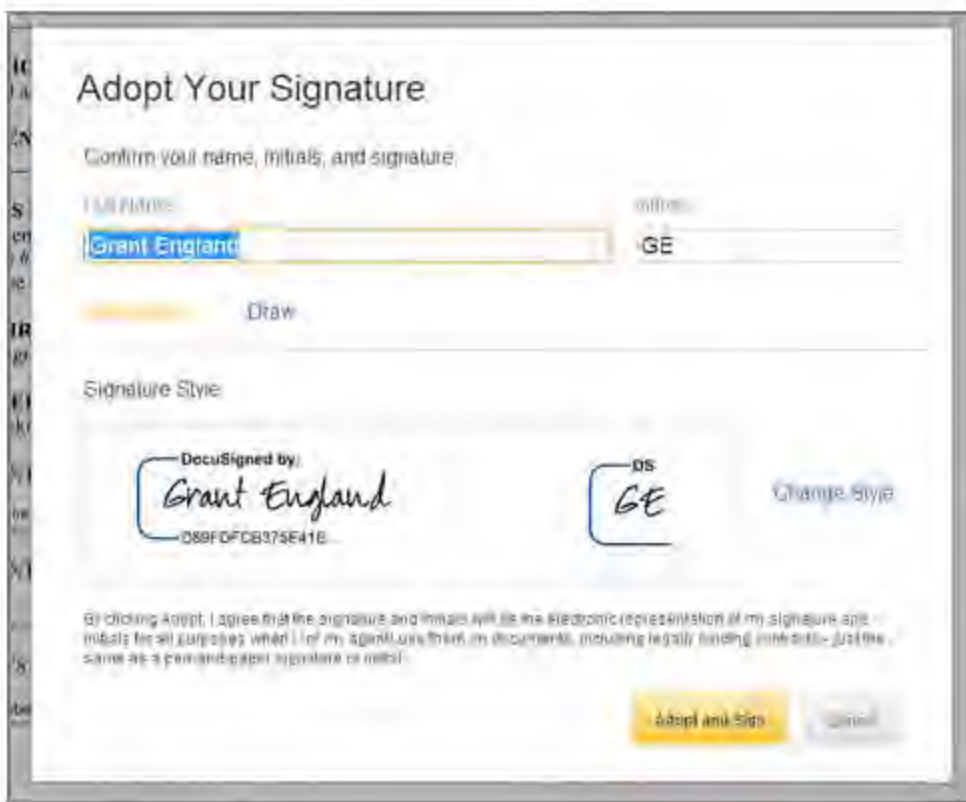
- Buttons to Review Documents, Decline, Finish Later



4. Grant checks the box to agree to do business electronically and clicks Review Documents. Your document appears with the signing fields.



5. Grant begins to step through the signing fields, first confirming his signing name and choosing a signature style.



- 6. Grant notices that you already signed the document. He hovers his mouse over your signature and reviews your signature ID card.



- 7. Grant finishes all the signing actions and confirms the signing.



8. Grant receives an email notification that the document is complete. The notification includes the completed, tamper-sealed PDF as an attachment.



9. Lissa Burnky, the property owner, receives an email notification that your document is complete and ready for her to view. The email includes the signed forms as attachments, and the private message you sent to Lissa appears on the document.