LEE KENNEDY
Let's build on big thinking.

Last edited November 16, 2023

DOCUSIGN
PLAYBOOK

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Options for Accessing Docusign

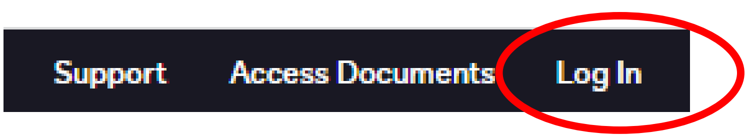
1 QR Code

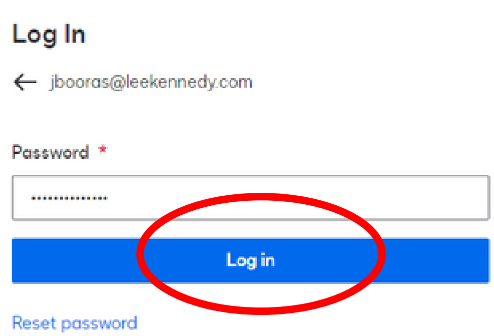
2 Website

www.docusign.com

3 Login

- Click Log in at the top right-hand corner of the screen
- Enter password
    - Username will autofill
- Click “Log in”

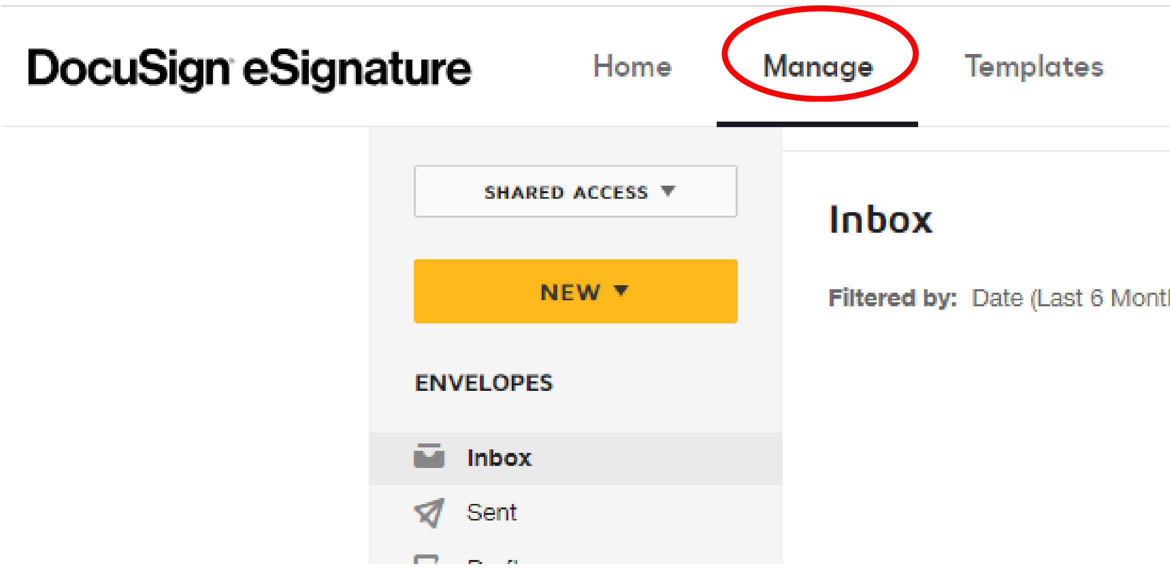




Sending Documentation

1- Upload Document(s)

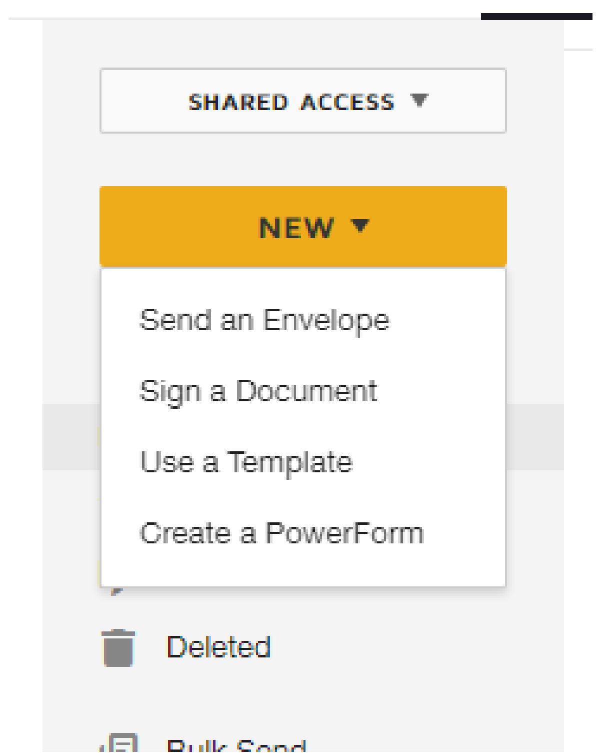
- Click on the “Manage” tab



2- Upload Document(s)

- Click on the “NEW” button on the upper left-hand side of the screen

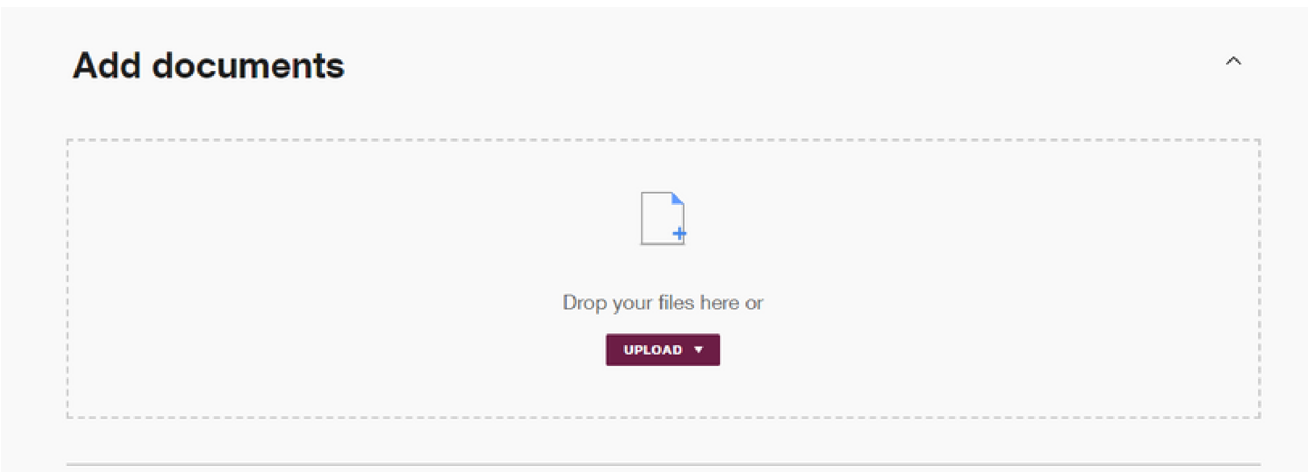
- Click “Send an Envelope”



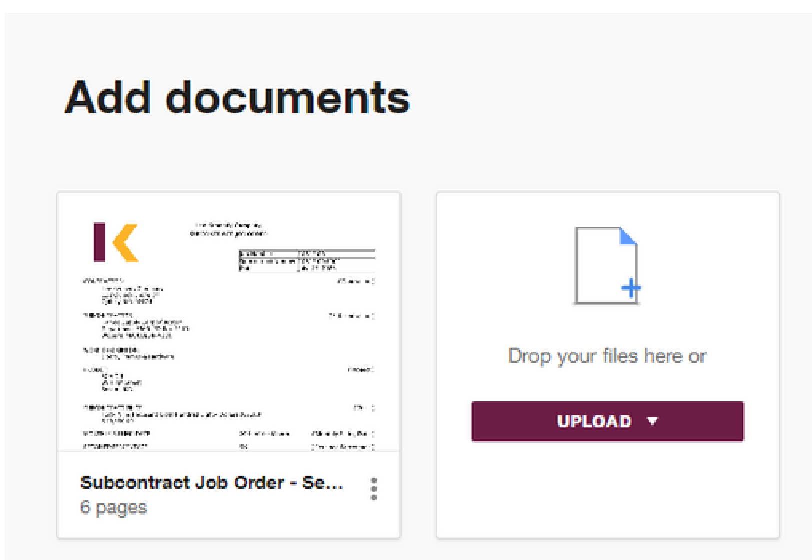
Sending Documentation

3- Upload Document(s)

- Upload documents to the envelope by:
  - Dragging and dropping the file into the white box labeled “DROP FILE HERE”
  - Click the “Upload” button and select the file



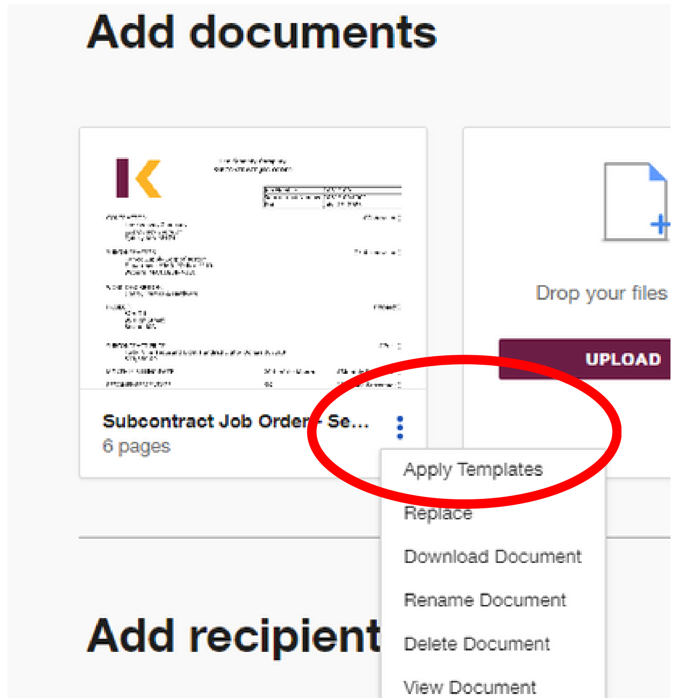
- Once you have uploaded the document, you will see it under the “Add Documents” section



Sending Documentation

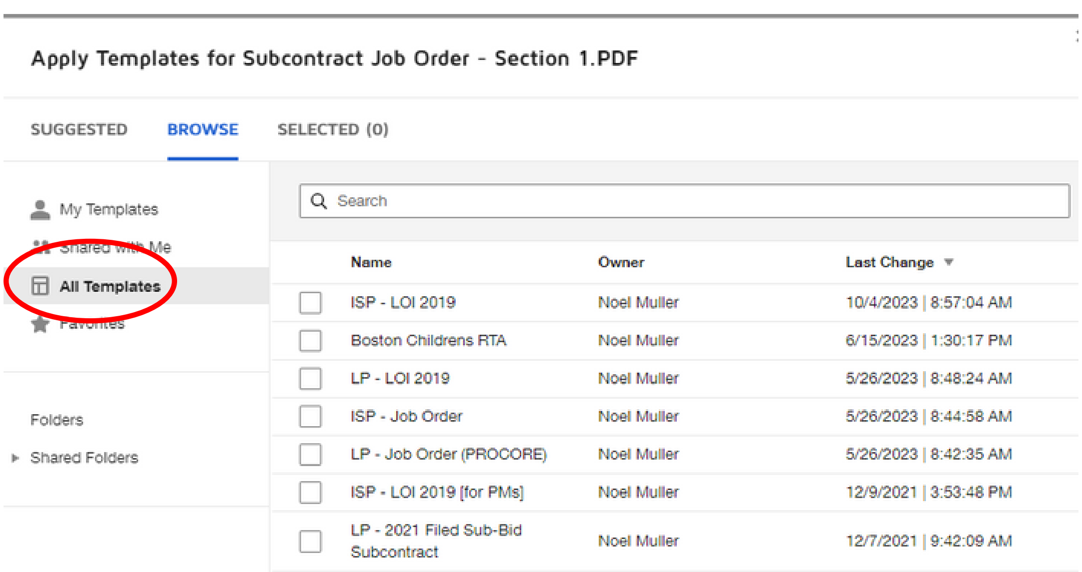
4- Apply Template(s)

- **Click on the 3 vertical dots at the bottom right-hand side of the document**
- **Click "Apply Templates"**



5- Apply Template(s)

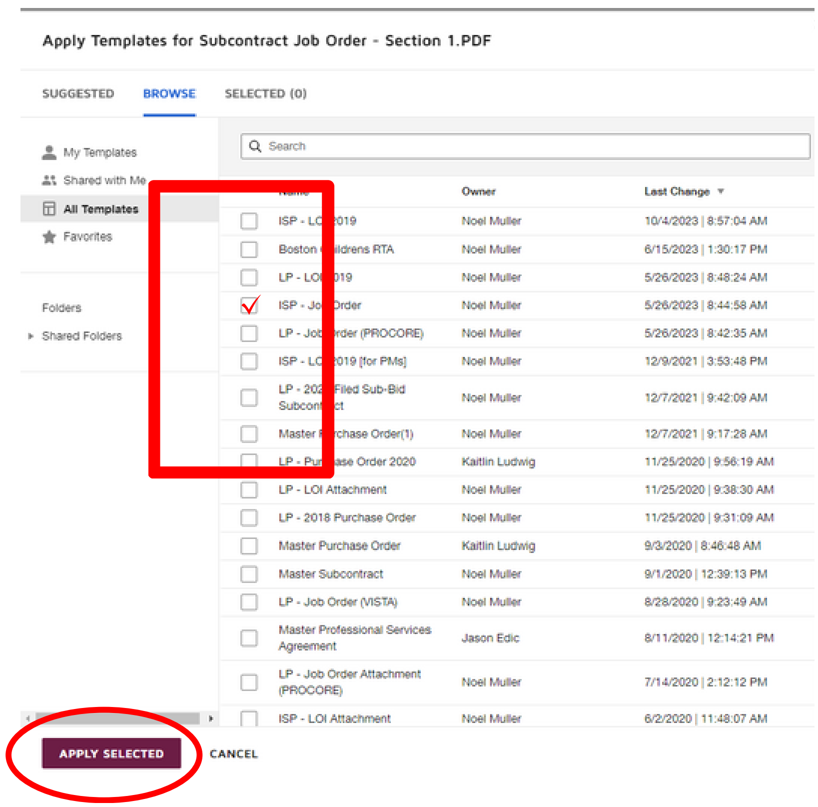
- **A new window will appear, click "All Templates" on the left-hand tree view**



Sending Documentation

6- Apply Template(s)

***All of the template options will appear. They are named accordingly with the document to which they apply.**



- **Click the checkbox next to the appropriate template**

- **Click "Apply Selected"**

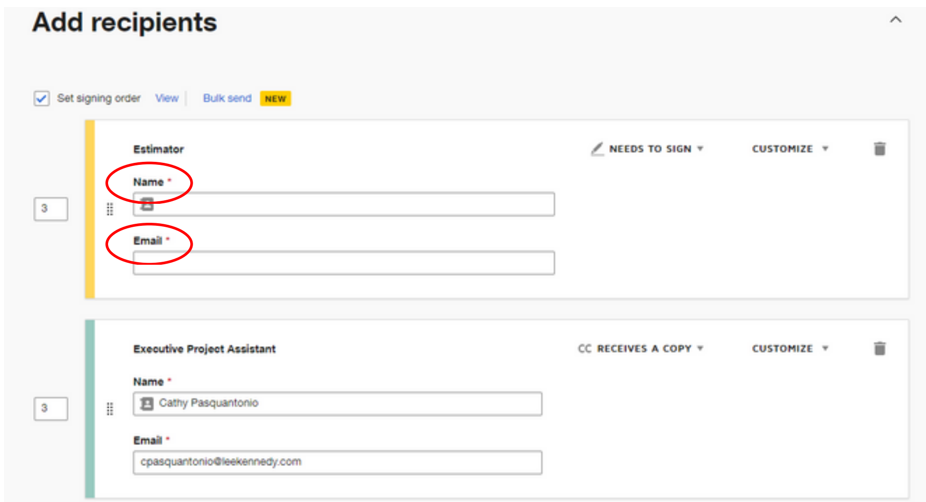
- **Repeat this step for all documents in the envelope**

Sending Documentation

7- Fill in the rest and send

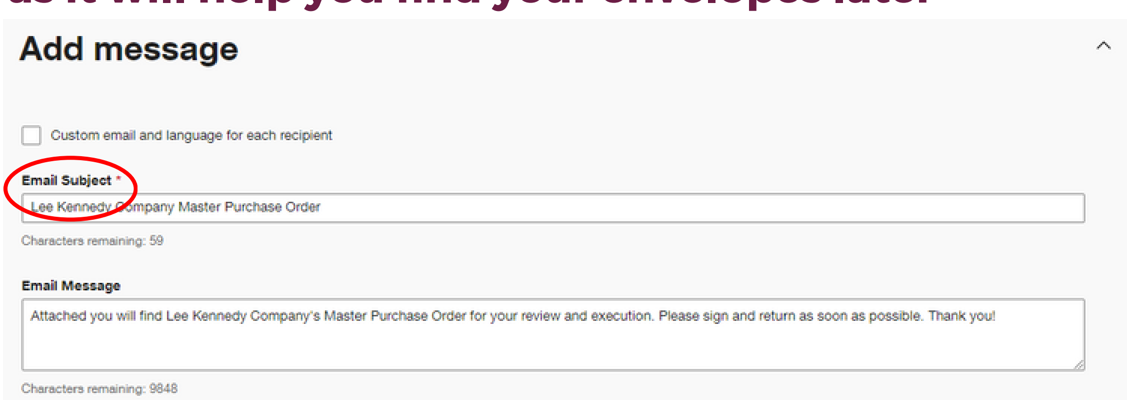
- **Under “Add recipients” input the names and emails of all the recipients**

***NOTE- Some fields will autofill**



8-Fill in the rest and send

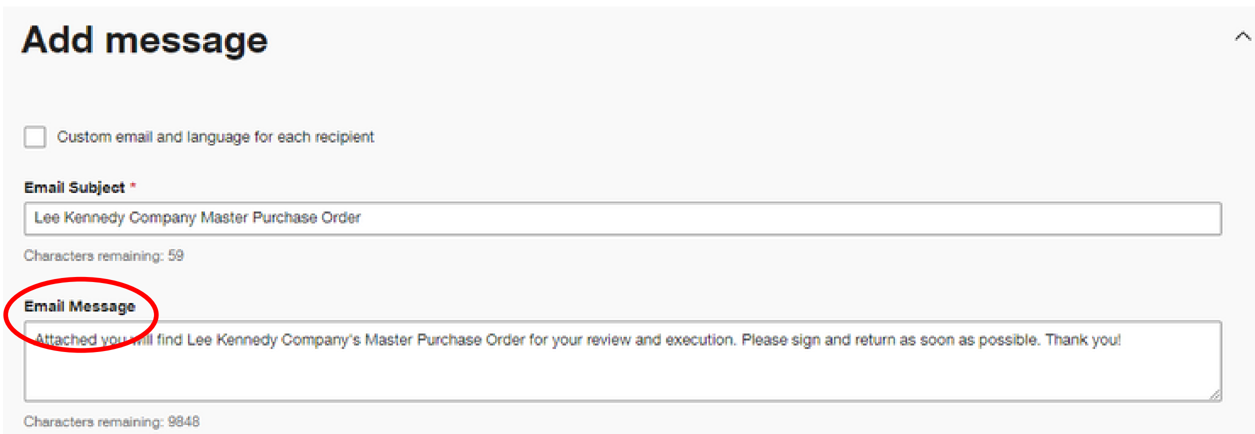
- **Scroll down to “Add message”**
- **Enter the “Email Subject”**
  - ***The program will only search the subject of the email. Be aware of this as you are naming the email subject, as it will help you find your envelopes later**



Sending Documentation

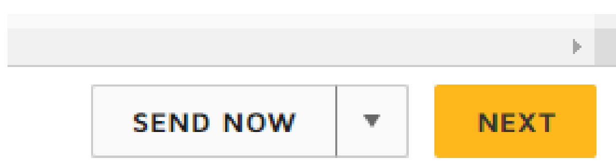
9- Fill in the rest and send

- **Private messages are automatically applied to recipients as part of the template, so no email message is necessary**

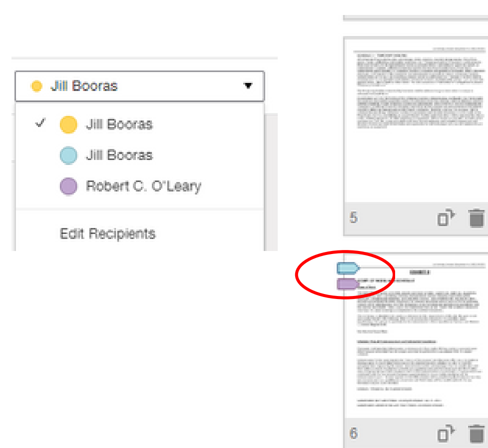


10-Fill in the rest and send

- **Click "NEXT" in the bottom right-hand corner to preview the document**



***NOTE- in the top left-hand corner, the recipient is listed with a color code. This allows you to see where in the document they should sign**



Sending Documentation

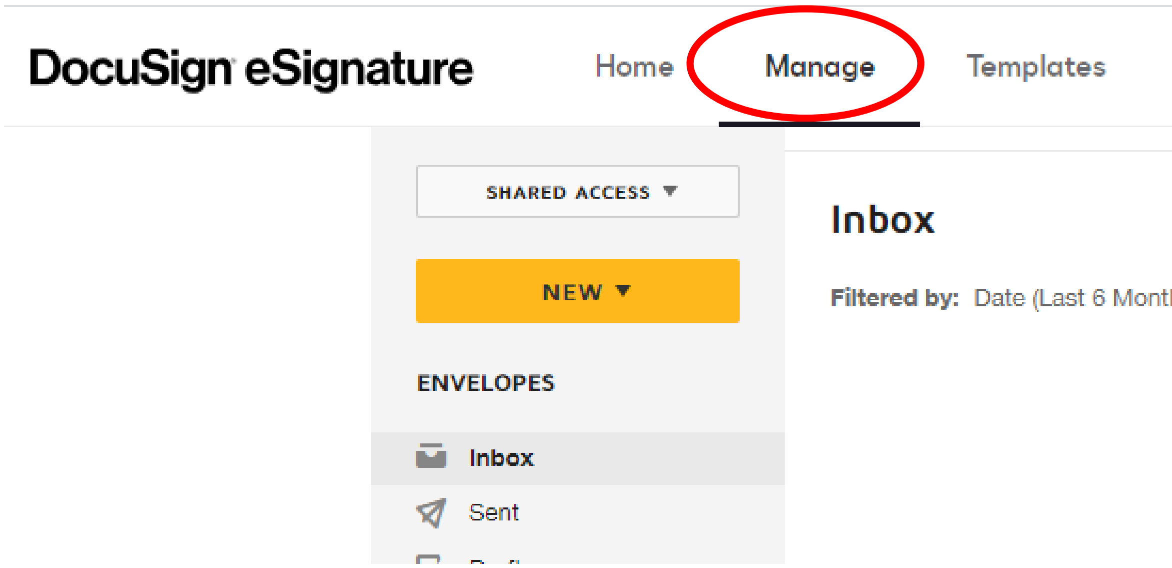
11- Fill in the rest and send

- **Click the yellow "Send" button in the bottom right-hand side of the page**

Track Documents

1

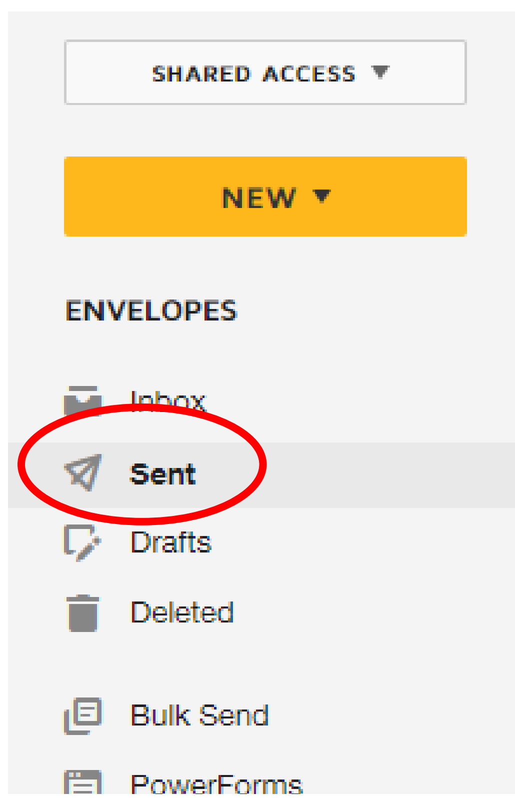
- **Click on the “Manage” tab**



***This will default you to your inbox.**

2

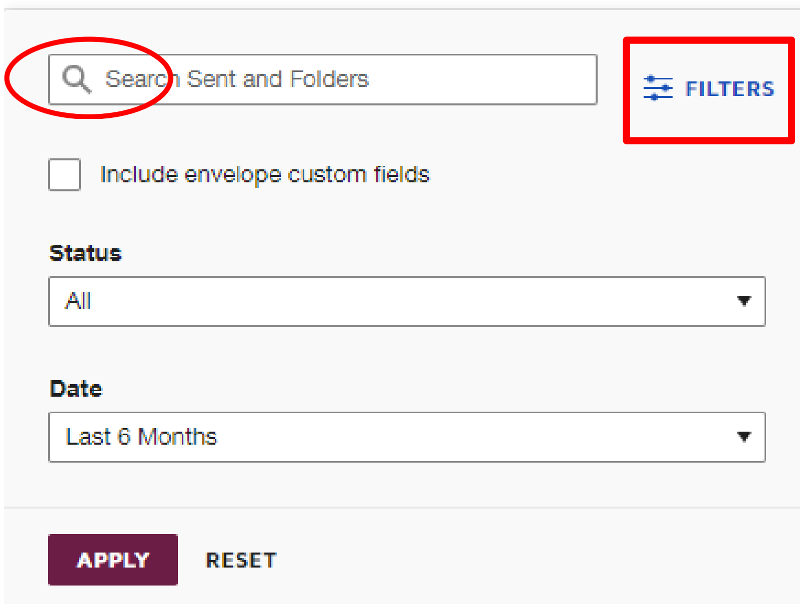
- **Click the “Sent” button on the left-hand side of the screen to see all of the envelopes that you have sent**



Track Documents

3

- **To filter, click on "Filters" in the upper-right-hand corner**
- **Click "Search Sent and Folders"**
- **Click "Apply"**

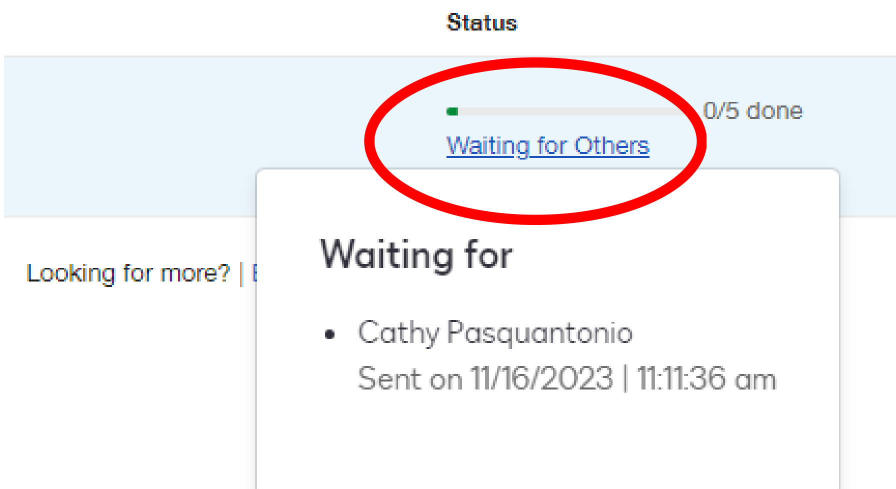


***From here you can search for any name/number included in the subject line, filter by the status of the envelope, and/or filter by date**

Track Documents

4

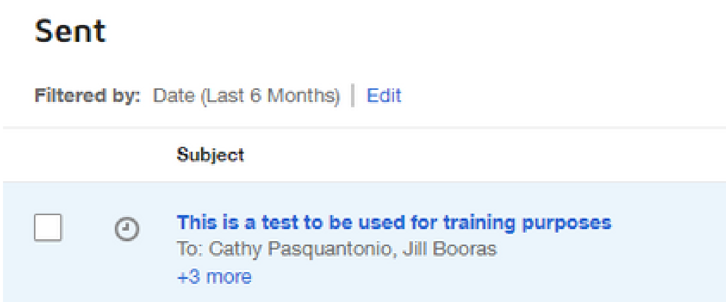
- **Hover over the "Waiting for Others" status on an envelope to see whom the envelope is currently waiting for a signature from**

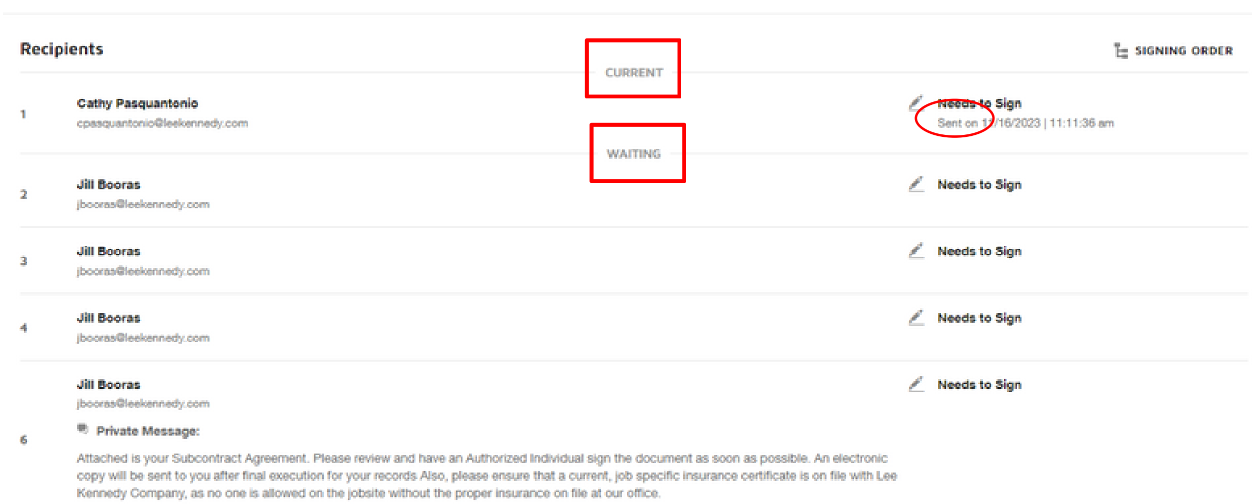


Track Documents

4

- Click anywhere on the envelope listing. This will open a new screen with just that envelope. Information includes:
    - Who has already signed the envelope and what date/time they did
    - Who the envelope is with currently, if they viewed it, and what time/date they did
    - Who is waiting to receive the envelope

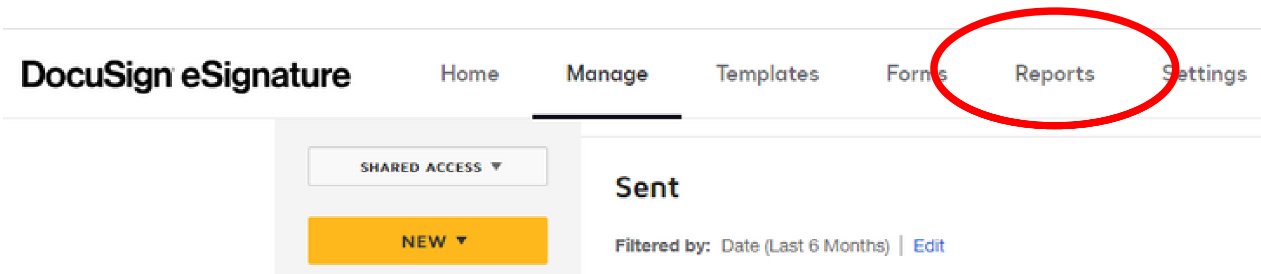




Create Reports

1

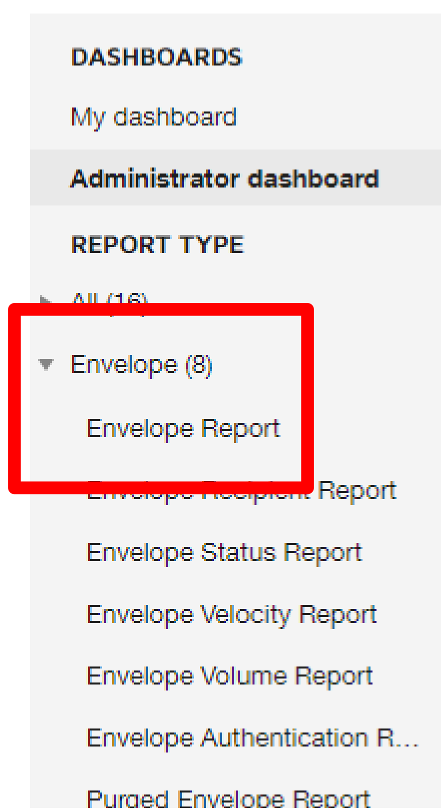
- Click on the “Reports” tab



2

- Click on the arrow next to “Envelope” on the treeview on the left-hand side of the page

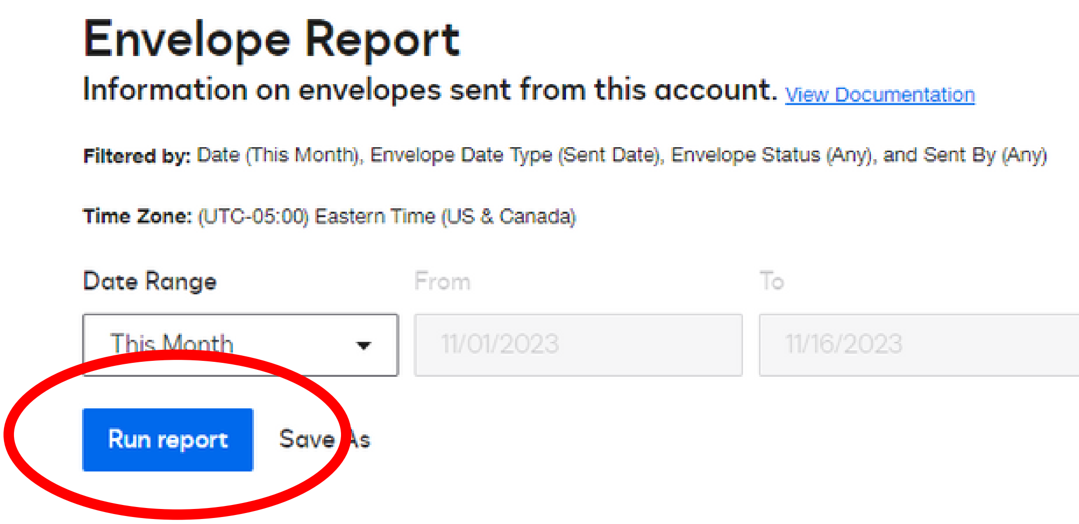
- Click on “Envelope Report”



Create Reports

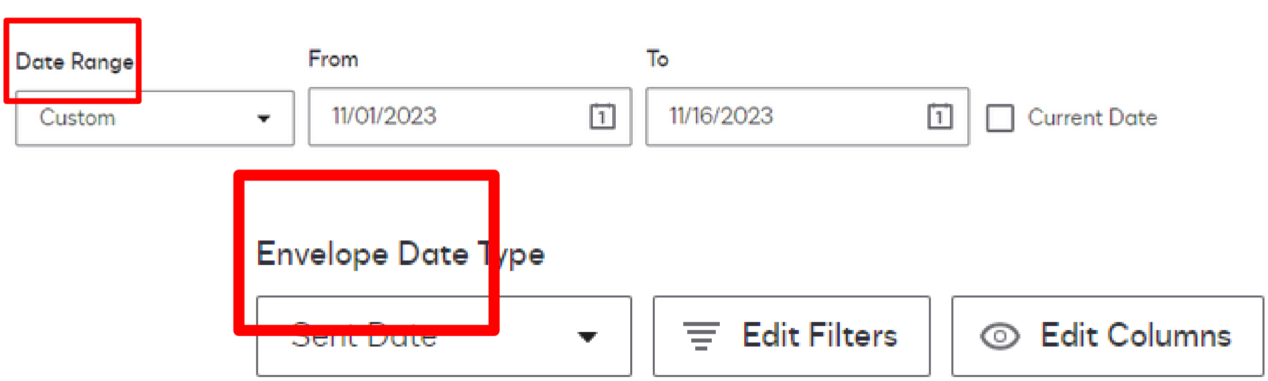
3

- **Click on the "Run Report" button**



4

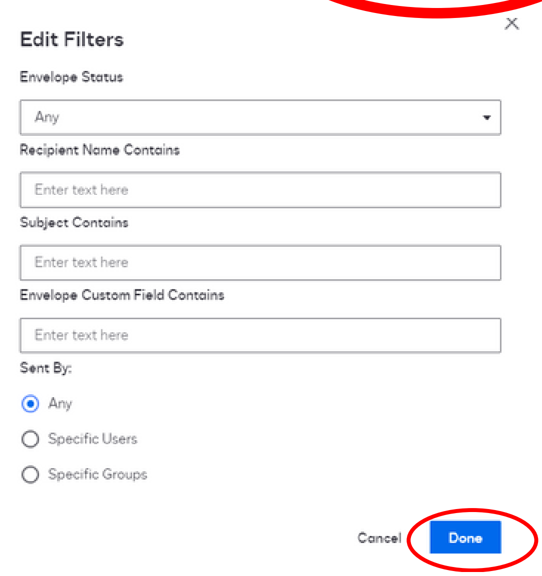
- **In the report screen, you can apply the following filters:**
  - **Date Range**
  - **Envelope date type**



Create Reports

*NOTE

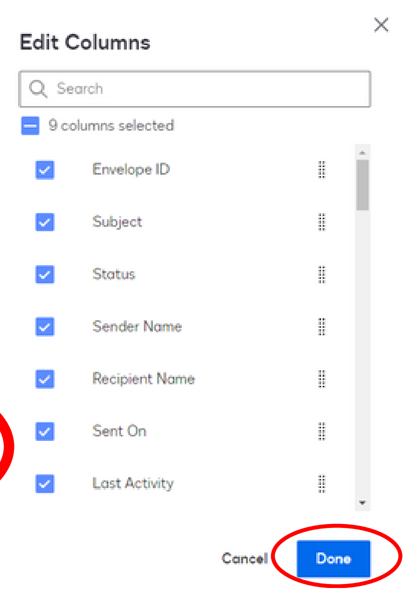
- **Click "Edit Filters" to filter by**
  - **Envelope Status**
  - **Job#**
  - **Subcontractor**

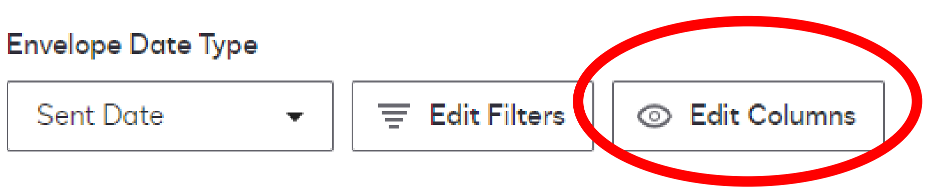


- **Click "Done"**

- **Click "Edit Columns" to check or uncheck filtered items**

- **Click "Done"**



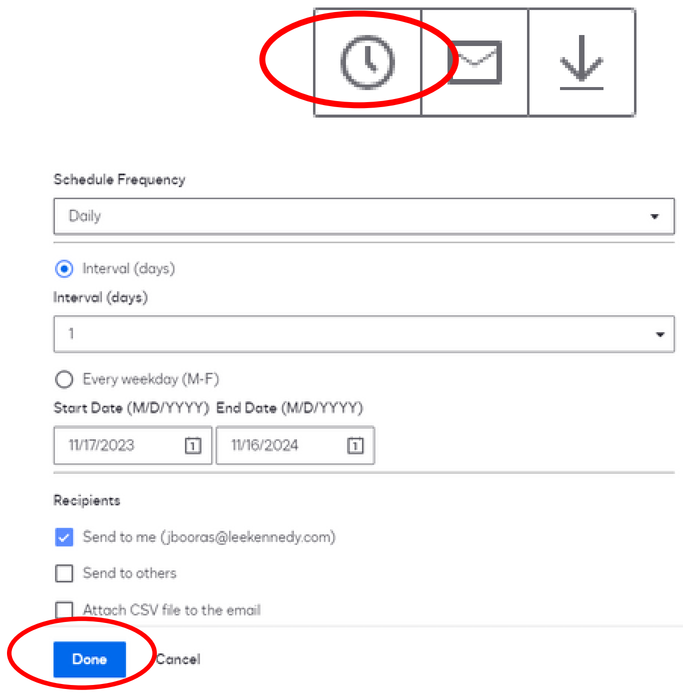


Create Reports

7

- Use the clock icon on the right side of the screen to schedule the report to be emailed automatically

- Click “Done” when settings have been applied

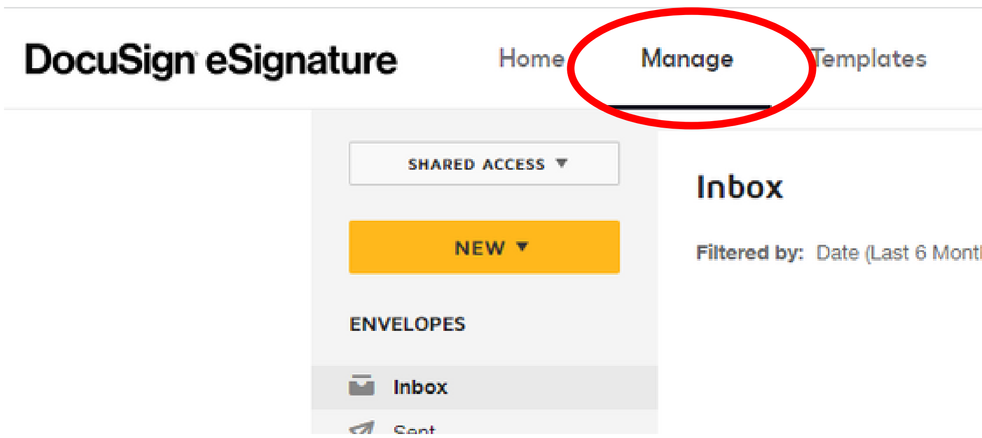


Share Envelopes

1

***NOTE- To share envelopes with team members, you must reach out to a DocuSign Administrator. Contact the IT Team for help**

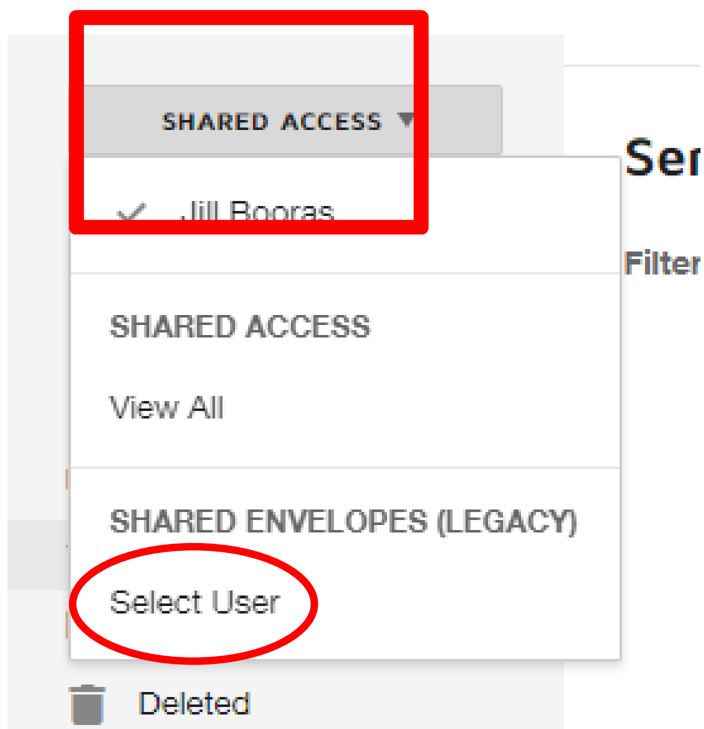
- **Click on the "Manage" tab**



2

- **Click on "Shared Access" in the top left-hand side of the screen**

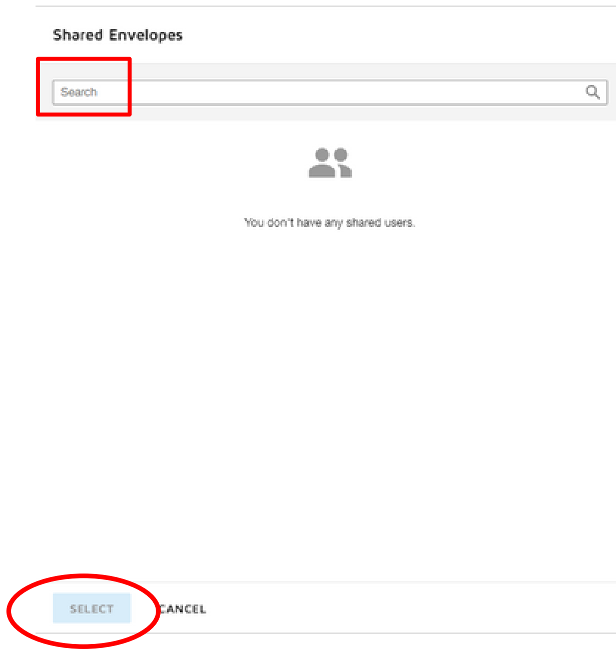
- **Under "Shared Envelopes" click on "Select User"**



Share Envelopes

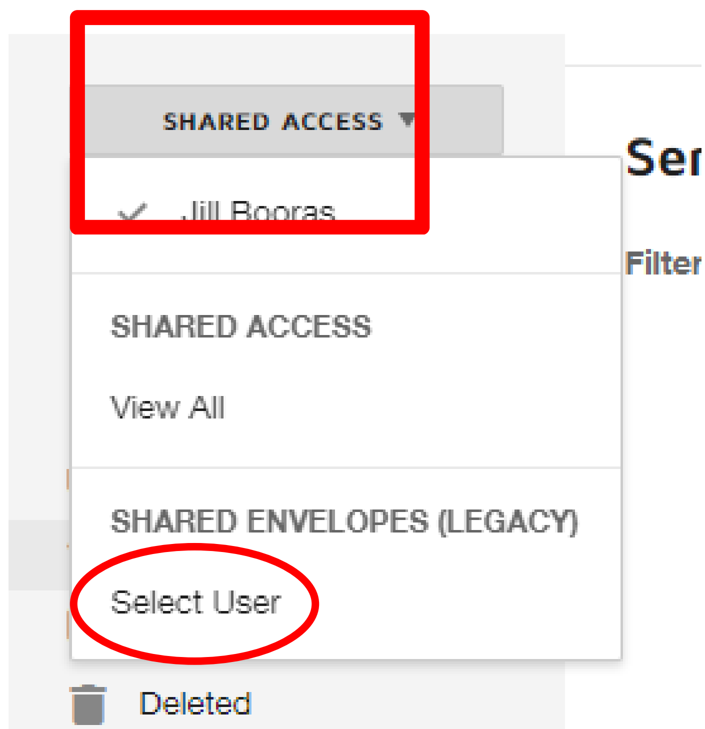
3

- **A new screen will appear. Input the name of the person you'd like to share an envelope with**
- **Click "Select" at the bottom left of the screen**



4

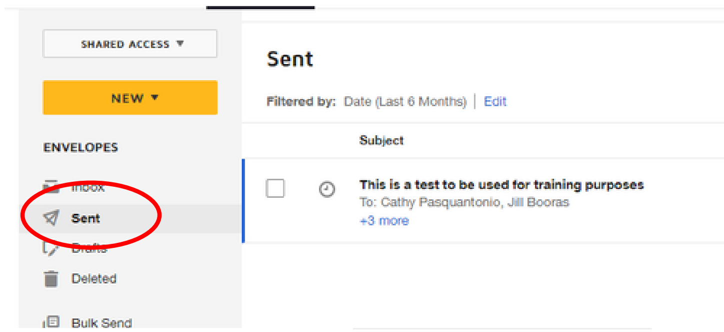
- **Click on "Shared Access" in the top left-hand side of the screen**
- **Under "Shared Envelopes" click on "Select User"**



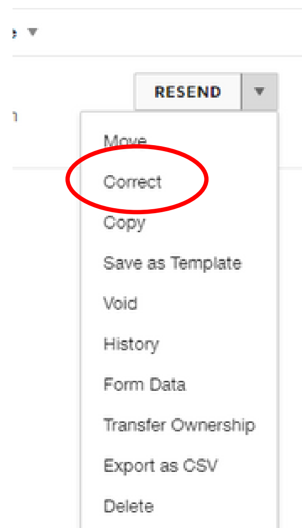
FAQs

Why can’t I find the envelope that I just sent?

- You are defaulted to your inbox when you go to the manage section. If the workflow has not reached your role yet, it will not show up in your inbox. You must select the sent items to see all the envelopes you have sent.

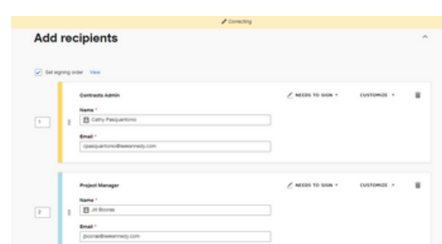


The subcontractor contact is not the correct contact, what should I do?



- While you can select an envelope, click correct, and update information such as email addresses for non-completed roles, you should only do that if the person is no longer at the company OR if the email address was entered incorrectly.

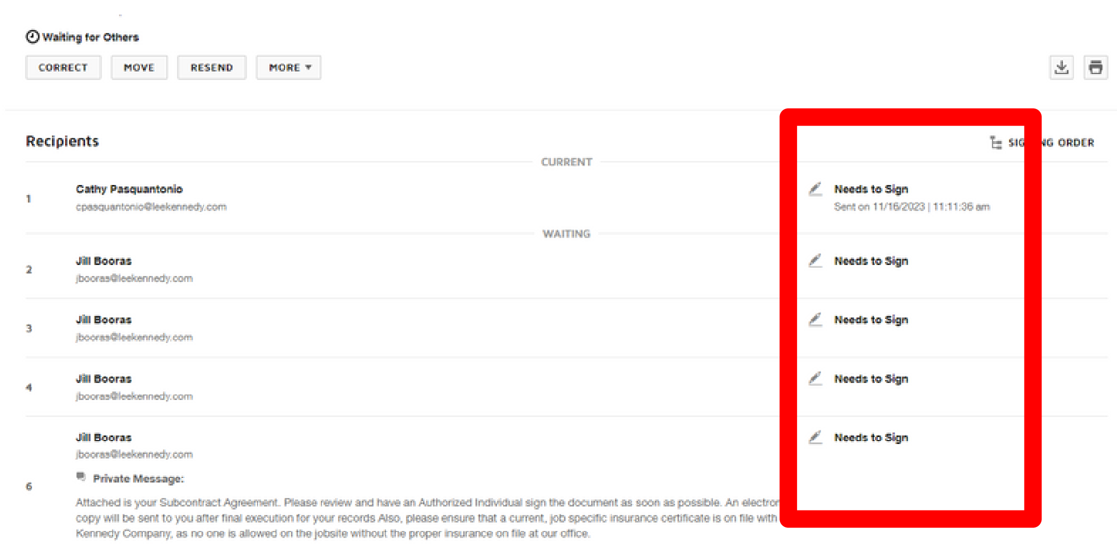
- If the envelope was received but the person isn’t the correct signer, we recommend that they manage to reassign the envelope on their end by clicking on “Other Actions” from within the envelope and selecting “Assign to Someone Else” Then they will be able to enter the correct person’s information and will still receive a copy of the fully executed document once it’s completed.



FAQs

My envelope is not complete yet, how do I see who it's waiting on?

- From your sent items, click on the envelope to open it. From the envelope screen, you can see who has completed the envelope, who it's waiting on, and who's yet to receive it. It will also show you when it was sent to the recipient as well as if they've viewed it, but not completed it.



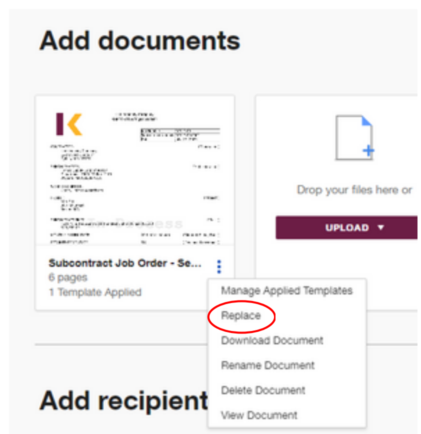
Someone declined my envelope, what do I do now?

- When someone declines an envelope, they need to give a reason. You will have to recreate the envelope with a new, corrected document (that addresses whatever the issue that prompted the decline) and start the review/signing process all over again.

FAQs

There's something wrong with the document in the envelope, how do I fix it?

- If nobody has signed off on the envelope yet, you can swap out existing documents for a new, corrected document. From your sent items, click on the envelope to open it. From the envelope screen, click on the "Correct button". Once the correcting screen opens, click on the three dots button on the document and select "Replace". You are now able to navigate to and select the correct document. The template that was previously applied to the envelope will remain, so there is no need to re-apply a template after swapping out the documents



- If someone has signed off on the envelope, you will need to void the envelope and start from scratch. This can be done by clicking the drop-down menu to the right of the envelope in the inbox and selecting "void". The system will prompt you for a reason for voiding the envelope, this reason will be emailed out to all recipients that already signed. So not delete the envelope, voiding the envelope is sufficient.