

UNIVERSITY OF DELAWARE EXCHANGE

DocuSign Instructions
Revised 1/30/2024

DocuSign Instructions

DocuSign is to be used by staff when a document, such as a contract, requires signature by one or more parties.

Users requiring access to DocuSign should contact procurement@udel.edu to request an invitation to an account.

Requests for DocuSign accounts made directly through the DocuSign system will not be processed.

This guide will illustrate:

- **Creating a DocuSign Document (Slide 2)**
- **Assigning a DocuSign to Someone Else (Slide 25)**



Creating a DocuSign Document



Log in to DocuSign

Enter your email to log in.

Email *

NEXT

[Sign Up for Free](#)

To access DocuSign, go to <https://account.docusign.com/#/username>.
Your login for DocuSign is your email address.





On the Home screen select **Start**.
Select **Send an Envelope**.

0
Expiring Soon

0
Completed

Drop documents here to get started

or

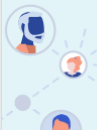
START ▾

Send an Envelope

Sign a Document


Use a Template

Want to do more?




Automate Envelope Routing
Now you can send to the right people based on predefined routing rules.

[Learn More](#)



Drawing
With drawing fields, recipients can upload or draw on images.

[Learn More](#)

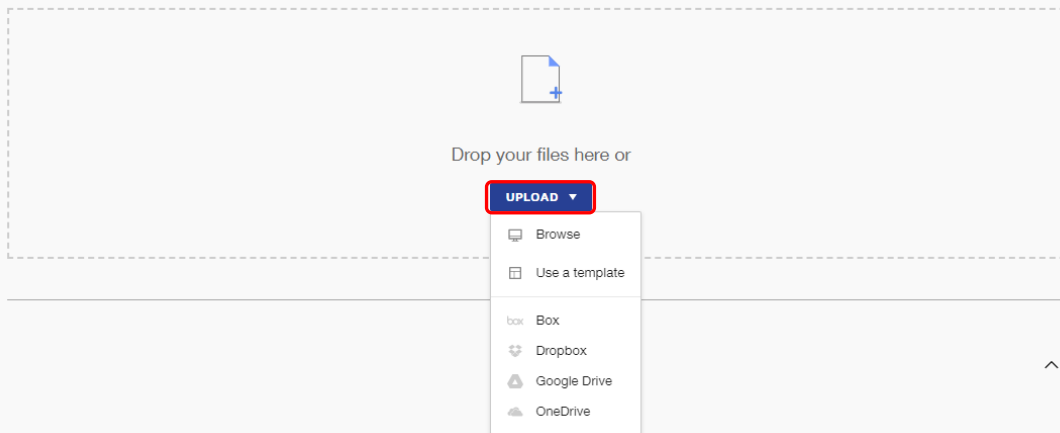


Need help getting started?
Get help with basic questions.

[View Our Guide](#)



Add documents



You will be prompted to **Add documents** to the Envelope:

Upload the final version of the document(s) you need signed.

- Uploads can be in Word or PDF formats (DocuSign automatically converts Word documents into PDF).
- You may also retrieve documents from the cloud and connect to Google Drive.



Add recipients

The screenshot shows the 'Add recipients' interface. At the top, there is a checkbox for 'Set signing order' which is checked. Below this are links for 'View' and 'Bulk send' with a 'NEW' badge. The main area contains two recipient entries, numbered 1 and 2. Each entry has a 'Name' field and an 'Email' field. A red box highlights the first recipient's fields, which contain 'YouDee' and 'youdee@udel.edu'. A second red box highlights the 'NEEDS TO SIGN' dropdown menu, which is open and shows several options: 'Needs to Sign' (checked), 'In Person Signer', 'CC Receives a Copy' (indicated by a red arrow), 'Needs to View', 'Specify Recipients', 'Allow to Edit', 'Update Recipients', 'Signs with Notary', and 'Signs with Witness'. At the bottom, there are buttons for 'ADD RECIPIENT' and '+ ADD DELAY'.

Add recipients to the Envelope:

Complete the recipient fields with the **name(s)** and **email address(es)** of the people who should receive the document for signature.

The menu offers additional options such as **cc** if a recipient should only **Receive a Copy**.

You can also **Set signing order**, if you require that one recipient sign before another.

Add message

Custom email and language for each recipient

Email Subject *

Please DocuSign - Computer Bill of Sale

Characters remaining: 61

Email Message

Please DocuSign the Computer Bill of Sale in this envelope

Characters remaining: 9942

Add message (optional):

You can add a message to be distributed to **all** recipients.

Or, you can select the option to create **Custom email and language for each recipient**.



Add message

Custom email and language

To: You Dee

Email Language *

English (US)

Email Subject *

Please DocuSign - Computer B

Characters remaining: 61

Email Message

Please DocuSign the Computer

Characters remaining: 9922

To: George Walueff

Email Language *

Dutch

Advanced Options

Recipient Privileges

- Allow recipients to sign on paper
- Allow recipients to change signing responsibility or assign a delegated signer
- Allow recipients to edit

Reminders

- Send automatic reminders

Number of days before sending first reminder:

5

Number of days between reminders:

1

Expiration

120

Envelope will be queued for expiration on 3/9/2024

Number of days in which to warn signers before expiration:

30

SAVE CANCEL

Select **Advanced Options** for additional features such as allowing recipients to change signing responsibility or sending recipients automatic reminders.



English (US)

Email Subject *

Please DocuSign - Computer Bill of Sale

Characters remaining: 61

Email Message

Please DocuSign the Computer Bill of Sale for the computer you are purchasing.

Characters remaining: 9922

To: George Walueff

Email Language *

English (US)

Email Subject *

Please DocuSign - Computer Bill of Sale

Characters remaining: 61

Email Message

Please DocuSign the Computer Bill of Sale in this envelope for the computer you are selling.

Characters remaining: 9908

Frequency of reminders: Every 0 days ⓘ

Click **Next** in the bottom right corner of the screen.

SEND NOW

NEXT



You Dee

✓ You Dee
● George Walueff

Edit Recipients

Signature
Initial
Date Signed

Name
Email
Company
Title

Text
Number
Checkbox
Dropdown
Radio
Payment Item

Drawing
Formula
Attachment
Note

221%

Computer Bill of Sale Demo Document

Documents

Computer Bill of Sale ...

Pages: 1



This page contains your document.

In the **top left-hand corner**, you will see a menu listing the recipients responsible for signing. Each recipient will have a colored circle next to their name.

BACK

SEND



George Waluff

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Number **NEW**
- Checkbox
- Dropdown
- Radio
- Payment Item

- Drawing
- Formula
- Attachment
- Note

For each recipient:

Drag and drop the **Standard Fields** into the places of the document that they need to complete.

The most commonly used fields are signature, name, title, and date signed.

Each field will be color-coded to the recipient.



Date Signed



Date Signed

SAVE AS CUSTOM FIELD

DELETE

BACK

SEND



George WaluEFF

221%

SHORTCUTS

Search Fields

- Standard Fields
 - Signature
 - Initial
 - Date Signed
 - Name
 - Email
 - Company
 - Title
- Text
- Number **NEW**
- Checkbox
- Dropdown
- Radio
- Payment Item
- Drawing
- Formula
- Attachment
- Note

To make a field required:
Click the field in the document, then select the **Required Field** checkbox in the right-hand sidebar.

Signature

Recipient

- George WaluEFF
- Required Field

Formatting

- 100 Scale %

Data Label

Tooltip

Location

SAVE AS CUSTOM FIELD

DELETE



Date Signed



Date Signed

BACK SEND



- Standard Fields
 - Signature
 - Initial
 - Date Signed
 - Name
 - Email
 - Company
 - Title
 - Text
 - Number **NEW**
 - Checkbox
 - Dropdown
 - Radio
 - Payment Item
 - Drawing
 - Formula
 - Attachment
 - Note

The **Actions** menu offers options to edit the message, recipients, documents, or anything else you created on the previous page.

Computer Bill of Sale Demo Document



Date Signed



Date Signed

ACTIONS

PREVIEW

SHORTCUTS

SAVE AND CLOSE

DISCARD

Edit Message

Edit Recipients

Edit Documents

Advanced Options

100 Scale %

Data Label

Tooltip

Location

SAVE AS CUSTOM FIELD

DELETE

BACK

SEND



Complete with DocuSign: Computer Bill of Sale

Viewing as You Dee

Desktop View

Please review the documents below. FINISH OTHER ACTIONS

START

Computer Bill of Sale Demo Document

Sign

DocuSign

Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2023 DocuSign Inc. | V2R

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Number **NEW**
- Checkbox
- Dropdown
- Radio
- Payment Item
- Drawing
- Formula
- Attachment
- Note

Documents

Computer Bill of Sale ...

Pages: 1

1

PREVIEW

SHORTCUTS

BACK SEND

Click **Preview** to view the document as one of your recipients. You have the option to select desktop, tablet, or mobile view. Click the **X** in the top right to close recipient view.



You Dee

221%

SHORTCUTS

Search Fields

- Standard Fields
 - Signature
 - Initial
 - Date Signed
- Name
- Email
- Company
- Title
- Text
- Number **NEW**
- Checkbox
- Dropdown
- Radio
- Payment Item
- Drawing
- Formula
- Attachment
- Note

Computer Bill of Sale Demo Document

Sign ↓ Date Signed

Sign ↓ Date Signed

Documents

Computer Bill of Sale ...

Pages: 1

1

When your document is ready, click **Send** in the lower right corner of the screen.

BACK SEND



Please Review & Act on These Documents

DocuSign



Margot Martin
University of Delaware

Please DocuSign the Computer Bill of Sale in this envelope

Please review the documents below.

CONTINUE

OTHER ACTIONS ▾



11/9/2023

Recipients will receive an alert to sign the document.

If they are new to DocuSign, they will be asked to agree to use electronic records and signatures.





Margot Martin
University of Delaware

Please DocuSign the Computer Bill of Sale in this envelope

Please review the documents below.

CONTINUE

OTHER ACTIONS ▾



11/9/2023

- Finish Later
- Print & Sign
- Assign to Someone Else
- Void
- Correct
- Help & Support [↗](#)
- About DocuSign [↗](#)
- View History
- View Certificate (PDF) [↗](#)
- Session Information
- Report Abuse

If they are not ready to apply their electronic signature, the **Other Actions** menu offers options such as Print and Sign depending on the settings you applied when creating your Envelope.





Margot Martin
University of Delaware

Please DocuSign the Computer Bill of Sale in this envelope

Please review the documents below.

CONTINUE

OTHER ACTIONS ▾



11/9/2023

If they are ready to apply their electronic signature, they can click **Continue**.



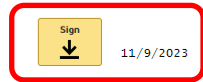


START

DocuSign Envelope ID: ABCE857C-6D4F-4268-B53E-628634BBDC34

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docusign.com

Computer Bill of Sale Demo Document



Recipients will need to click on the required fields to complete them.





DocuSign Envelope ID: ABCE857C-8D4F-4268-B53E-628634BBDC34

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docusign.com

Computer Bill of Sale Demo Document

DocuSigned by:
Margot Martin 023
AB2DE870E98848D

Once the required fields are completed, recipients will need to click **Finish** to move the document to the next recipient.

Ready to Finish?

You've completed the required fields. Review your work, then select **FINISH**.



Log in to DocuSign



A copy of this document has been saved to your DocuSign account. Please log in to view it.

Email
margotm@udel.edu

LOG IN NO THANKS

DocuSigned by:
Margot Martin 023
AKZ6K70EMR4D

A copy of the document will be saved for the recipients.

Ready to Finish?

You've completed the required fields. Review your work, then select **FINISH**.

FINISH



Welcome back

Last 6 Months



Signed by:
Margot Martin
AB2DE970E99848D...

0

Action Required

1

Waiting for Others

0

Expiring Soon

0

Completed

Drop documents to get started or click the 'Start' button.

Start

The dashboard on the DocuSign Home displays the status of all your envelopes. You can click on one of the status options or on the Manage tab to view details.

Recent Activity

Go to Manage →

Complete with DocuSign: Computer Bill of Sale
19 minutes ago

Waiting for 2 others

Resend



SHARED ACCESS ▾

NEW ▾

ENVELOPES

- Inbox
- Sent
- Drafts
- Deleted
- Bulk Send
- PowerForms

QUICK VIEWS

- Action Required
- Waiting for Others
- Expiring Soon
- Completed
- Authentication Failed

Developer Environment

Complete with DocuSign: Computer Bill of Sale

Envelope ID: [ID]

From: Margot Martin
Last changed on 11/9/2023 02:52:43 pm
Sent on 11/9/2023 02:45:28 pm

Waiting for Others

CORRECT | PROVE | RESEND | MOVE ▾

Recipients

Recipient	Status	Action
Margot Martin	COMPLETED	Signed
George Walueff	CURRENT	Needs to Sign
You Dee		Needs to Sign

Search Inbox and Folders FILTERS

	Status	Last Change
Complete with DocuSign: Computer Bill of Sale To: George Walueff, Margot Martin +1 more	1/3 done Waiting for Others	11/9/2023 02:52:43 pm

RESEND ▾

- Move
- Correct
- Copy
- Save as Template
- Void
- History
- Form Data
- Transfer Ownership
- Export as CSV
- Delete

Looking for more? | Edit your filters

On the **Manage** page you can select from options on the **Actions** menu as well as see additional linked details on each listed document.

The **Manage** page also offers pre-set **Quick Views** in the left-hand sidebar and options for additional **filters** in the document listing.



UNIVERSITY OF DELAWARE®



Your document has been completed.



[VIEW COMPLETED DOCUMENT](#)


Once fully executed by all parties, you and all recipients will receive a copy of the executed document as well as a notification email.



Assigning DocuSign to Someone Else



 DocuSign Demo System <dse_demo@docusign.net>
To  McCabe, Margot

 If there are problems with how this message is displayed, click here to view it in a web browser.

  Reply  Reply All  Forward  

Thu 11/9/2023 2:47 PM

This document is for demonstration purpose only.

DocuSign



Margot Martin sent you a document to review and sign.

REVIEW DOCUMENT

Margot Martin
margotm@udel.edu

Please DocuSign the Computer Bill of Sale in this envelope

Do Not Share This Email

This email contains a secure link to DocuSign. Please do not share this email, link, or access code

You may receive an email notification asking you to review a document.
Click **Review Document**.





Margot Martin
University of Delaware

Please DocuSign the Computer Bill of Sale in this envelope

Please review the documents below.

CONTINUE

OTHER ACTIONS ▾



11/9/2023

- Finish Later
- Print & Sign
- Assign to Someone Else
- Void
- Correct
- Help & Support [↗](#)
- About DocuSign [↗](#)
- View History
- View Certificate (PDF) [↗](#)
- Session Information
- Report Abuse

If you want someone else to sign the document for you, select **Assign to Someone Else** from the **Other Actions** menu.



Assign to Someone Else



* Required

Email Address for the New Signer *

janedoe@udel.edu

New Signer's Name *

Jane Doe

Please provide a reason for changing signing responsibility

Jane Doe is my POA

232 characters remaining

Selecting the Assign to Someone Else button will send a notification to the person to whom you assigned this envelope. The original sender will also receive a notification. You will be added as a Carbon Copy (CC) recipient.

ASSIGN TO SOMEONE ELSE

CANCEL

Fill in the **email address** and **name** of the recipient who should sign and a brief **reason** for changing signing responsibility.

Click **Assign to Someone Else**.

Once you select **Assign to Someone Else**, a notification will be sent to the new recipient.

The original sender will also receive a notification.

You will be added as a Carbon Copy (CC) recipient.

Upon the document garnering all signatures, you will receive another email with the fully executed version.



Questions:

- procurement@udel.edu

Resources:

- [Procurement Service Website](#)
- [DocuSign University](#)

