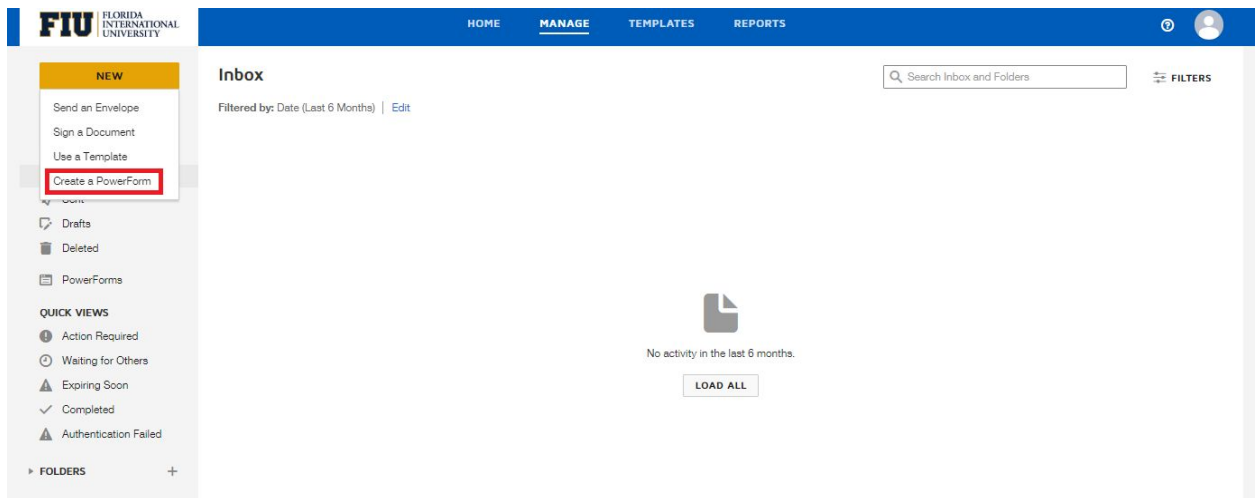
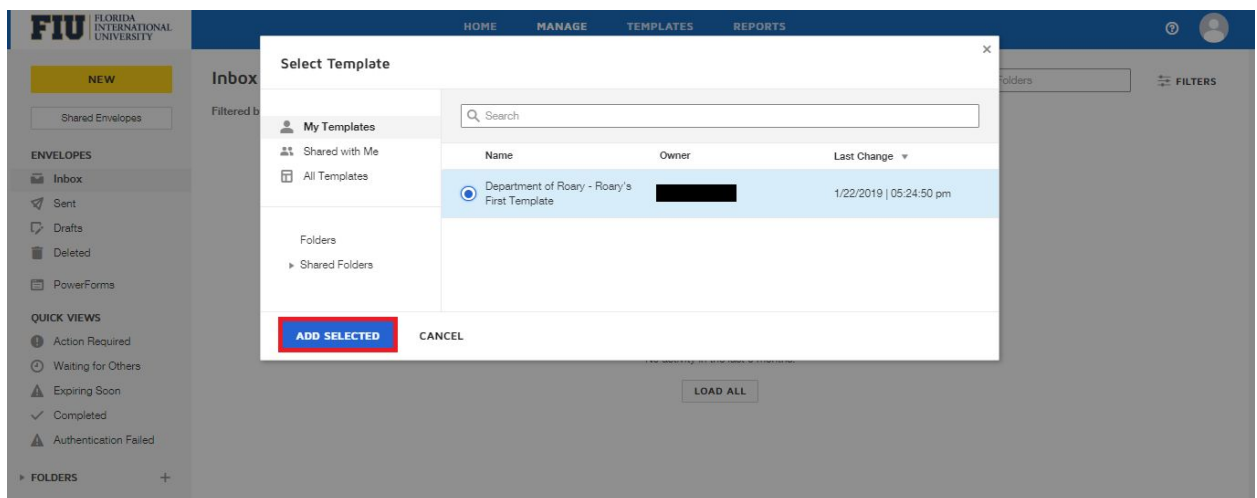


Creating DocuSign PowerForms

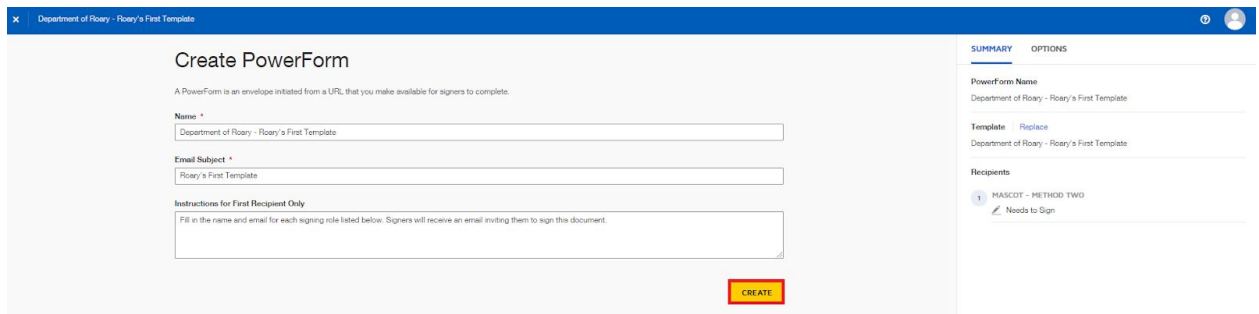
1. To begin creating a DocuSign PowerForm you'll first need to make sure you have created a template only filling in the **role** field for the recipient and have left the **email** and **name** field blank. If your template is not set up this way DocuSign will fail to create your PowerForm. Once you have your template formatted properly you can start the PowerForm process either in the **Template** view or in the **Manage** view. The steps are the same regardless of the view you are in, just click **New** and then click **Create a PowerForm**.



2. Select the **Template** you wish to use for your Powerform from **My Templates** or from **Shared with Me** and then click **Add Selected**.



- At this stage you will be able to set the **Name**, **Email Subject**, and **Instructions for First Recipient Only** (this refers to the person that will click on the PowerForm link) fields for your PowerForm. On the right hand side you will see the **Summary** and **Options** tabs. The **Summary** will let you know at a glance the name of the PowerForm, what template it is using, and an overview of the recipients' responsibilities and signing order. The **Options** will let you decide whether you will require email validation to complete the form, what message every signer will get before they complete the form, if you will set a maximum number of form completions and if so what number, and if you will set a minimum time between form submissions and if so how long. Once you have set up your PowerForm appropriately, click **Create**.



Create PowerForm

A PowerForm is an envelope initiated from a URL that you make available for signers to complete.

Name *
Department of Roary - Roary's First Template

Email Subject *
Roary's First Template

Instructions for First Recipient Only
Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

CREATE

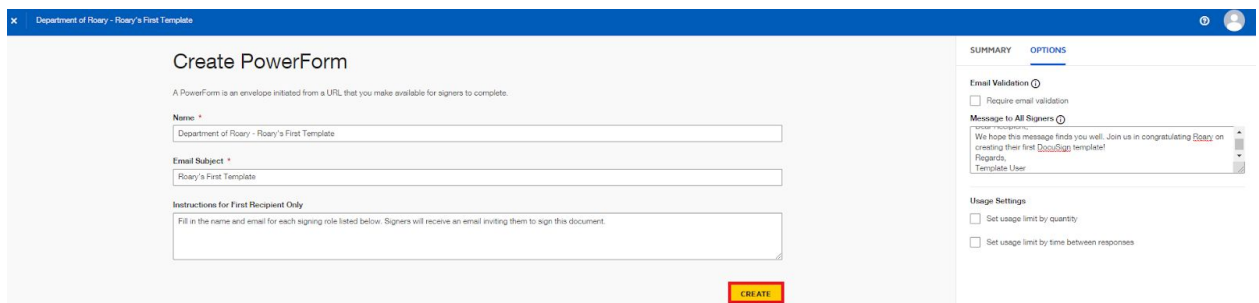
SUMMARY **OPTIONS**

PowerForm Name
Department of Roary - Roary's First Template

Template [Replace](#)
Department of Roary - Roary's First Template

Recipients

1. **MASCOT - METHOD TWO**
Needs to Sign



Create PowerForm

A PowerForm is an envelope initiated from a URL that you make available for signers to complete.

Name *
Department of Roary - Roary's First Template

Email Subject *
Roary's First Template

Instructions for First Recipient Only
Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

CREATE

SUMMARY **OPTIONS**

Email Validation

☐ Require email validation

Message to All Signers

We hope this message finds you well. Join us in congratulating [Roary](#) on creating their first [DocuSign](#) template!

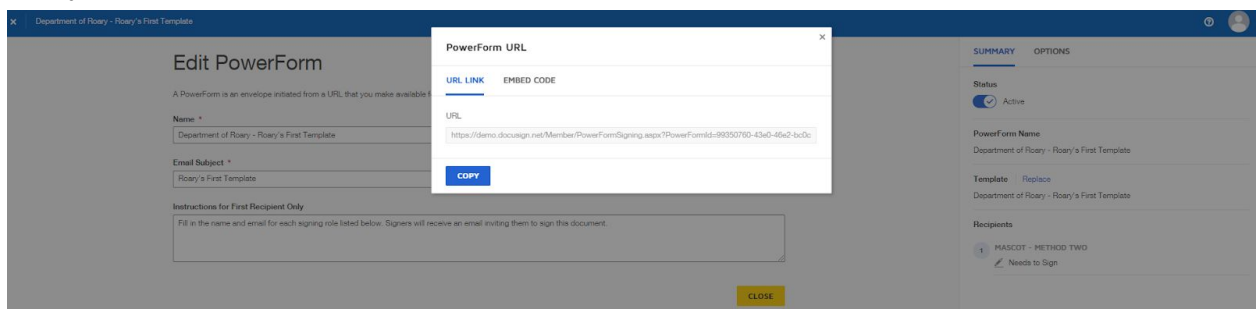
Regards,
Template User

Usage Settings

☐ Set usage limit by quantity

☐ Set usage limit by time between responses

- At this point your PowerForm will now be live and you should see the following pop-up informing you of your PowerForm's URL Link that you can copy and paste to wherever you need to distribute it. For your convenience, DocuSign also provides the HTML for the hyperlink under **Embed Code**.



Edit PowerForm

A PowerForm is an envelope initiated from a URL that you make available for signers to complete.

Name *
Department of Roary - Roary's First Template

Email Subject *
Roary's First Template

Instructions for First Recipient Only
Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

CLOSE

PowerForm URL

URL LINK **EMBED CODE**

URL
<https://demo.docusign.net/Member/PowerForm/Signing.aspx?PowerFormId=99350760-43a0-46a2-bc0c>

COPY

SUMMARY **OPTIONS**

Status
 Active

PowerForm Name
Department of Roary - Roary's First Template

Template [Replace](#)
Department of Roary - Roary's First Template

Recipients

1. **MASCOT - METHOD TWO**
Needs to Sign

- If at any point you decide to deactivate the PowerForm simply navigate to the **Manage** view, click **PowerForms** on the left-hand side, locate the PowerForm you wish to deactivate, click the down-arrow, and then click **Deactivate**.