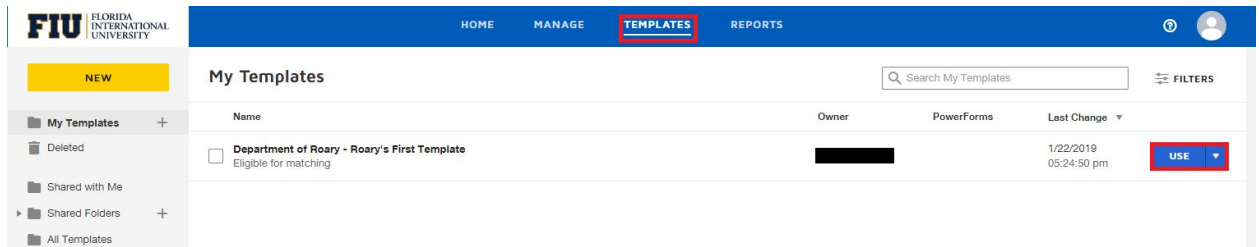


Using DocuSign Templates

To begin using a DocuSign template you can either be in the **Template** view or in the **Manage** view. The beginning process slightly changes based on where you start so we will divide them.

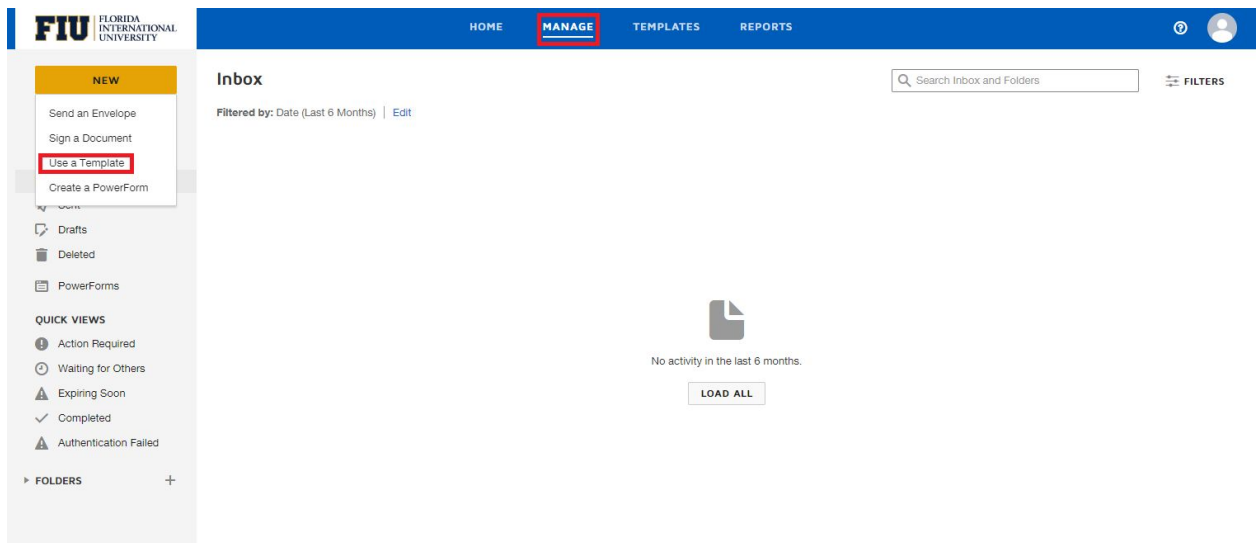
Template View:

1. Click **Use**.

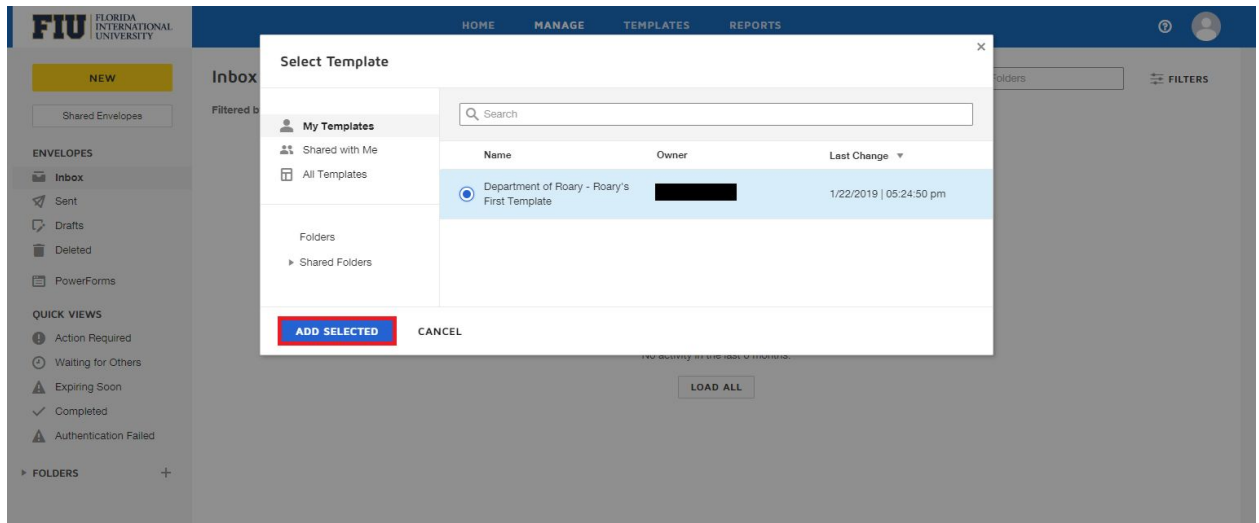


Manage View:

1. Click **New** and then **Use a Template**.

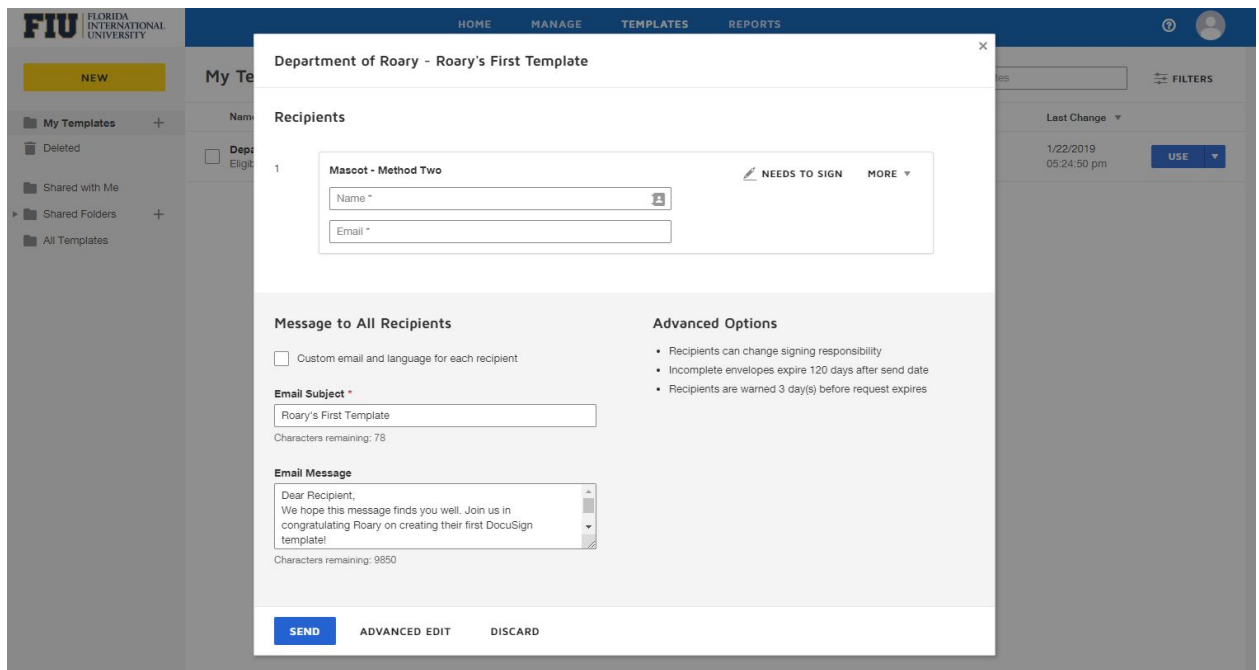


2. Select the Template you want to use from **My Templates** or from **Shared with Me** and then click **Add Selected**.



Either View:

1. You'll then be presented with a pop-up window. This pop-up contains all of the pre-populated information of the template and will allow you to quickly enter the **name** and **email** of the recipient(s), edit the **email subject** and **message**, and **send** the envelope. Should you choose to do further edits or upload a new document for the envelope you will want to click **Advanced Edit**.



- On the **Advanced Edit** page, you will have the same view as when you are normally sending an envelope. However, since you created a **Template**, you have an additional functionality for the document you choose to attach. If you replace the document used to create the **Template** with a document similar in structure, DocuSign will attempt to match the form fields as best as possible to the resulting document. For example, if we were to download the “Demonstration Test Form.pdf” and change the text on the document above the signature fields and then replace the existing PDF with our newly created one DocuSign would do it’s best to keep **signature fields** on the Employee Signature and Supervisor Signature lines, the **full name fields** on the Print Name lines, and the **date signed fields** on the Date lines. If you were to remove an area that had a form (i.e. if you were to remove the line for Supervisor Signature but kept Employee Signature), DocuSign would attempt to preserve as many of the other fields as possible. It is worth noting that DocuSign usually doesn’t get the field positions just right when you do this, so it is a good practice to check the field locations and move them appropriately before sending the document.

Rowey's First Template

ACTIONS NEXT

Add Documents to the Envelope

UPLOADED

USE A TEMPLATE

GET FROM CLOUD

Demonstration Test Form.pdf

1 page

1 Template

Replace

Download Document

Rename Document

Delete Document

View Document

Import a document

Set signing order

Masocot - Method Two

NEEDS TO SIGN MORE

ADD RECIPIENT

Message to All Recipients

Custom email and language for each recipient

Email Subject *

Rowey's First Template

Characters remaining: 75

Advanced Options Edit

- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 3 day(s) before request expires

SEND NOW NEXT

- At this stage you would ensure that the recipient **Name** and **Email** fields as well as the **Email Subject** and **Email Message** are filled out as appropriate, and then continue to send the envelope as you would normally.