QUICKGUIDE

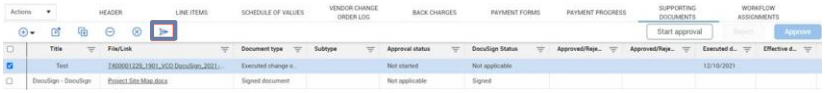
DOCUSIGN

InEight® CHANGE

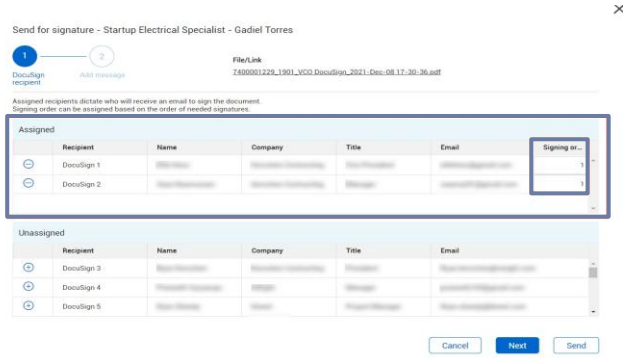
SEND A DOCUMENT FOR E-SIGNATURE

Documents must be in Word, Excel, or PDF format. They must be saved to the contract or VCO supporting documents page with the document source My computer.

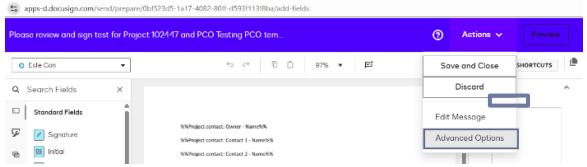
1. From the contract or VCO Supporting documents page, select one or more documents with the document source *My compute*r, and then click the **Send** for signature icon.



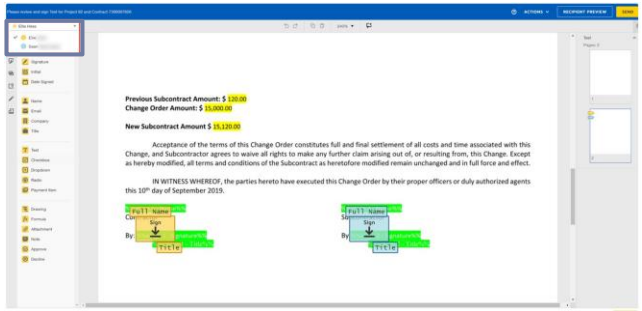
2. Review the Names in the Assigned section of the wizard. If you want to add additional recipients, find their names in the Unassigned section, and then click the **Add** icon. All signees in the Assigned section have ad-hoc signee tags that can be placed on the document in DocuSign.



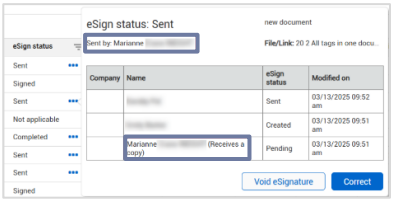
3. Review the values in the Signing order column. The numbers in the column specify the order in which the recipients are sent the document for eSignature.
4. If recipient information is missing from the Assigned section, update the information as needed.
5. Click **NEXT**.
6. If your DocuSign administrator has configured Advanced Options, you can optionally expand the Actions menu, and then select Advanced Options.



7. Enter an email subject line and message to the recipients, and then click **Send**. A DocuSign window opens with the documents you chose.



8. All names from the Assigned section of the wizard are shown in a drop-down list in the upper left pane. Select the name of the person you want to add, and then select Signature, Initial, or Date Signed, and then click the place in the document.
9. Click **SEND**.
10. The last step of the eSign status on the Supporting documents tab now shows the sender of the envelope with the annotation Receives a copy.



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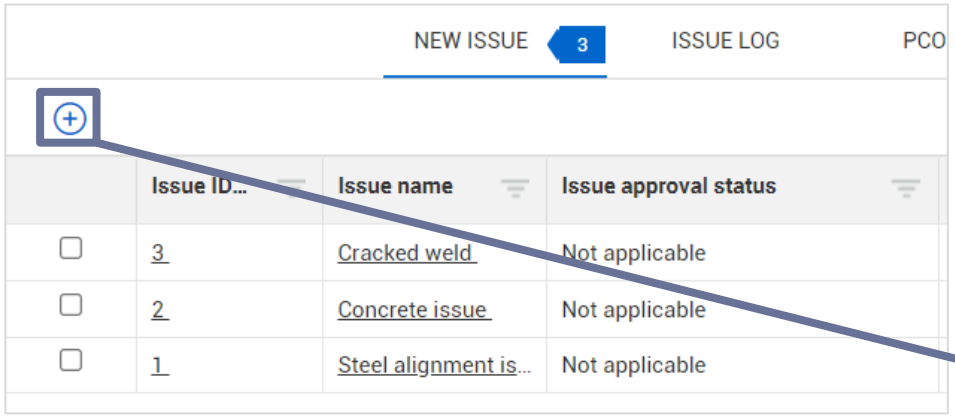
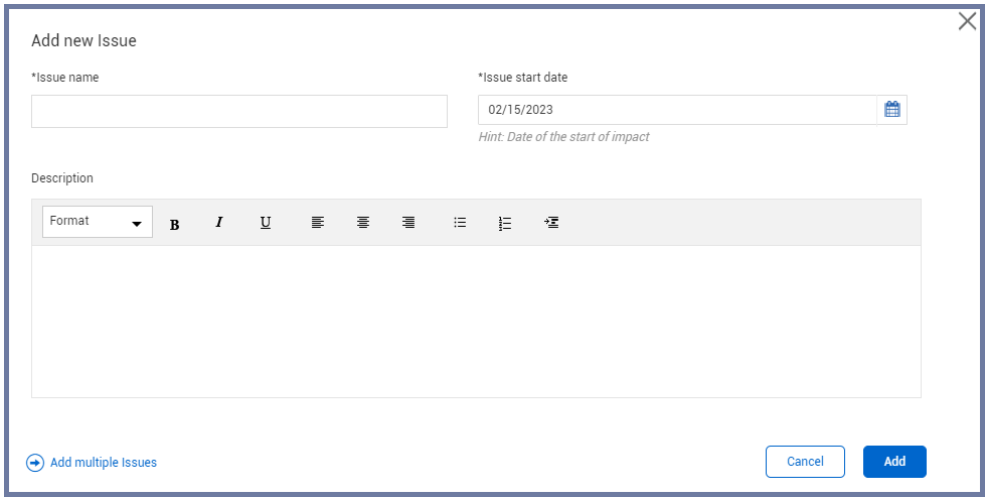
DOCUSIGN SETUP

1. From the New issue page or the issue log, click the **Add issue** icon. The Add new issue dialog box opens.
2. Enter the issue name and issue start date. You can also optionally enter a description of the issue.
3. Click **Add**.





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