

I. Home Page

a. Shows you a summary of recent documents (waiting, completed, action required, expiring soon)

b. Manage Tab

- i. Looks like email, you can organize and make folders according to what you are sending out
- ii. Under sent, you can click on the individuals name and see if they have viewed it, signed it, waiting for others and time stamps.
- iii. Under completed, you will see all of the documents you have every sent that have been complete
- iv. If you create folders, you will see it below in folders tab and you can move/label it from completed

c. Templates

- i. My Templates: where all the documents you create will be
- ii. All Templates: Because we have a joined account, all our documents are in here and can be used (does not changed yours)

iii. New Template

- 1. **Create:** This will allow you to upload any document (word works better in my experience).
 - a. Title
 - b. Add recipients/signing order
 - c. Email Subject/Email Message
- 2. **Upload:** Uploading an already made template and adjust
 - a. You must download the template first
- 3. **Filling it In**
 - a. On the top left you will see the recipients you inputted (Student, Parent/Guardian, Advisor, Staff, etc.) They are color coded, so you know which parts each recipient is filling in.
 - b. In the left tools bar is the basics (Name, Signature, Date, etc.)
 - c. Once you assign it, a tools menu will pop up on right with settings
 - d. Main ones used other than the basics, can create rules!
 - i. Text
 - ii. Checkbox
 - iii. Dropdown
 - iv. Radio

iv. Using/Editing a template:

- 1. Click on the template and it will bring up many options
 - a. **Use Button:** Will bring up a pop-up page for you to use as is (use mostly if you are only sending to a couple students)
 - b. **Edit Button:** Can change the title of file, recipients, email subject, email message, and can add documents. The “Next” yellow button will take you to the document and you can edit the fill in boxes. Depending on how many are in your signing order, there will be coded by color at the top left corner. Lots of options!! Once done, you hit save and close.

v. Downloading completed envelopes

- 1. Have to be downloaded one by one
- 2. On home screen/manage go to “completed”, click the document you need to download.
- 3. On the top right corner you will see a downward arrow to “download”
- 4. If document has multiple pages click “Combine All PDFs”

vi. Bulk Send - CSV Files

1. Go to home page, click big yellow “NEW” button, and select “Send an envelope”
2. Select “Use a Template”
3. Under “Add Recipients to the Envelope”, you will see a sentence blue hyperlink that says, “Import a bulk list” and at the end of that sentence is this symbol ⓘ
4. Click the information symbol and then “Download the sample CSV template.”
5. An excel template will be downloaded. Open It.
 - a. Fill out columns A-D if student/parent signatures needed (Student Name, Student Email, Parent/Guardian Name, Parent/Guardian Email)
 - b. Fill out columns A-B if only 1 signature needed
 - c. Fill out columns according to how many signers
6. Once you fill it out, save it and rename it!
7. Then you click the blue hyperlink that says, “Import a bulk list”, select your file.
8. You will get a “Bulk List Preview” pop up window, double check information then click “Finish Import”.
9. Click next, make sure the document looks good, hit SEND!

****If any edits are made to the docusign template/signing order, a fresh CSV template must be downloaded****

d. Sandbox Accounts - <https://appdemo.docusign.com/> or <https://account-d.docusign.com/#/username> (These links get you to the sandbox login page)

- i. **CREATE AN ACCOUN FIRST** <https://go.docusign.com/o/sandbox/>
- ii. Sandbox lets you test run the documents without wasting an envelope
- iii. Works the same as docusign, but make sure it says “appdemo” in the link

e. Organizing in our own outlook inbox

- i. DocuSign emails (creating a rule)
- ii. Can get overwhelming because you get emails when the document has been viewed/signed by student, viewed/signed by parent/guardian, and when the document has been completed

➤ Link to Zoom training given to a few staff members (5/11):

https://docusign.zoom.us/rec/share/yuBEHo3y0z9OX6vI93jYfrx9Fb-6eaa8hCIX8vIPykoHrnd_onqKeArCZE65pu3K Password: OB=zo.z?