

DocuSign for Outlook — v5.2

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Overview

DocuSign for Outlook allows users to sign and return or get signatures on email attachments directly from Outlook. Users signing attachments themselves can return the signed documents to the original sender, or save the signed documents locally or to OneDrive for Business. Users getting signatures from others can use the app to add recipients and tag the documents to gather information from those specified. With the latest release of the application, users can now initiate a signing process from the new mail/reply window — just like they would start a new email.

Users with an existing account can log in with their DocuSign credentials. New users to DocuSign can sign up for a free trial from the Outlook app by joining DocuSign using their Office 365 credentials. This free trial allows for each individual to have an unlimited number of sign and returns, and up to 10 free DocuSign document sends.

This guide provides information on installing, signing, saving, and sending documents from within DocuSign for Outlook.

DocuSign for Outlook is supported on:

- IE10, IE11, Edge (current version) Chrome (current version), Firefox (current version), Outlook Web App, Outlook 2013 (Windows), and Outlook 2016 (Windows and Mac)

DocuSign for Outlook supports the following languages for sending and signing:

Chinese (Simplified), Chinese (Traditional), Dutch, English, French, German, Italian, Japanese, Korean, Portuguese (Brazil), Portuguese (Portugal), Russian, and Spanish

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Installing DocuSign for Outlook

DocuSign for Outlook is available from the [Office.com Store](#). Follow these steps to install DocuSign for Outlook:

1. Go to the DocuSign for Outlook listing on the [Office.com Store](#). Click **Add**, and confirm that you would like to install the application by clicking **yes** when prompted.
2. Once you have confirmed the application install, you will see a success screen.

Note: If your Office 365 administrator has blocked your ability to install applications into Outlook, you may not be able to add DocuSign for Outlook from the Office.com Store. Contact your system administrator to enable DocuSign for Outlook on your behalf.

3. You should now have DocuSign for Outlook installed and see it in the Outlook apps toolbar below the message header on any email message that has an attachment.

Signing Documents using DocuSign for Outlook

When you open Outlook after DocuSign for Outlook has been installed successfully, you see the DocuSign application in the gray Outlook apps toolbar in any email that has an attachment included.

Supported File Formats and Size

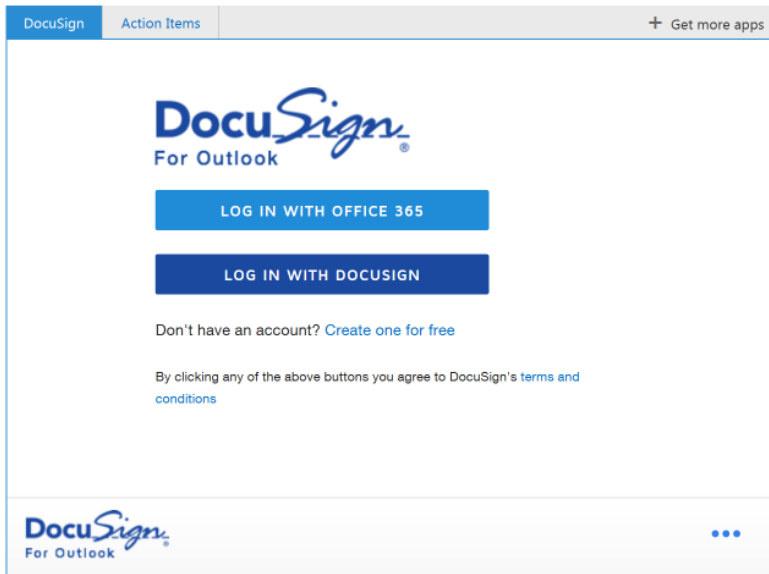
DocuSign for Outlook supports the following file formats:

- **Document:** as, asl, asp, doc, docm, docx, dot, dotm, dotx, htm, html, pdf, pdx, rtf, txt, wpd, wps, wpt
- **Drawing:** dwg, dxf, emz, svg, svgz, vdx, vsd, vss, vst
- **Image:** bmp, cdr, dcx, gif, ico, jpg, jpeg, pct, pic, png, egb, sam, tga
- **Presentation:** dps dpt, pot, potx, pps, ppt, pptm, pptx
- **Spreadsheet:** csv, et, ett, xls, xlsx, xslm, xlt
- **File Size Limitations:** Maximum File Size is 25 MB. Recommend File Size is 5 MB

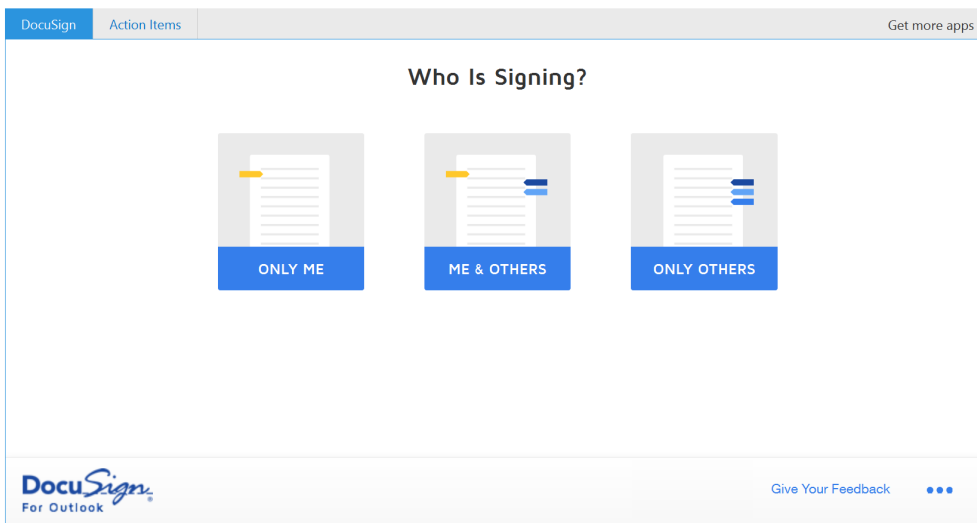
To sign an attachment

1. Select the email with the attachment(s) you want to sign with DocuSign.
2. Open the DocuSign application in the gray Outlook apps toolbar.

- If this is the first time you are signing attachments, or you previously logged out of DocuSign, you are asked to log in to an existing account or create a new DocuSign account using your Office 365 credentials.

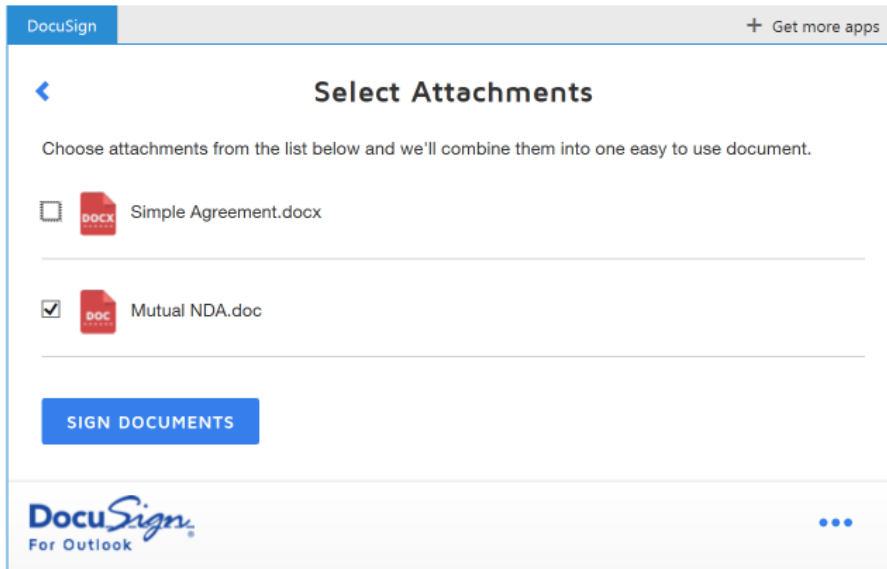


- You are prompted to choose who is signing. You can either sign an attachment yourself, get signatures from others, or specify that you and others need to sign the attachment. Since you are the only one signing, choose the **Only Me** option.

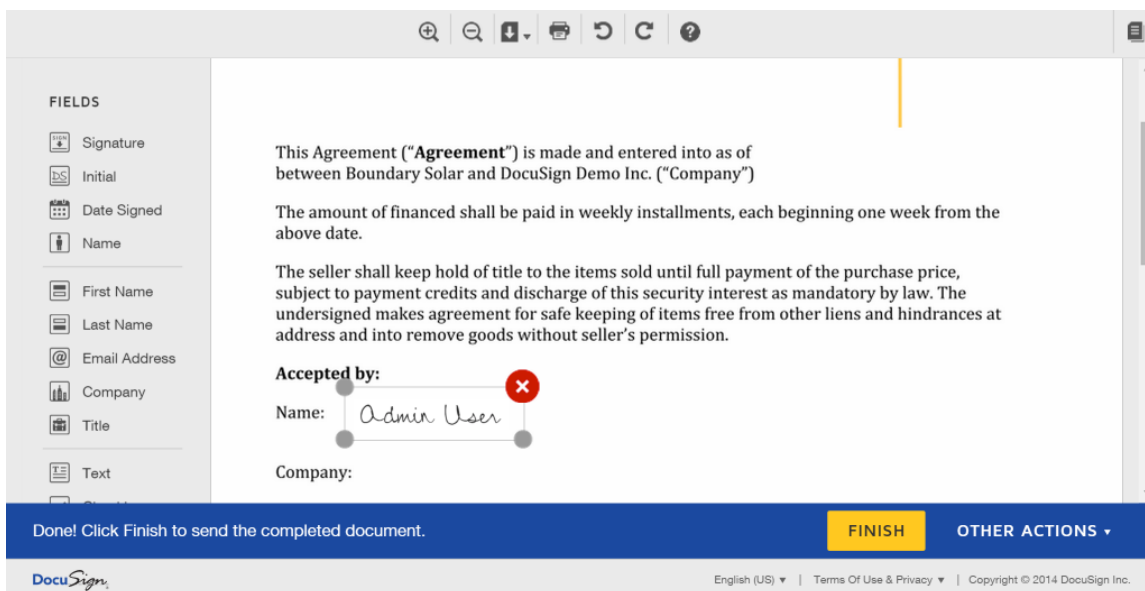


- Select the attachments you would like to sign. All attachments selected will be merged into one document to make signing as fast as possible.

Note: Only attachments in the supported file formats found above are displayed as eligible to sign.

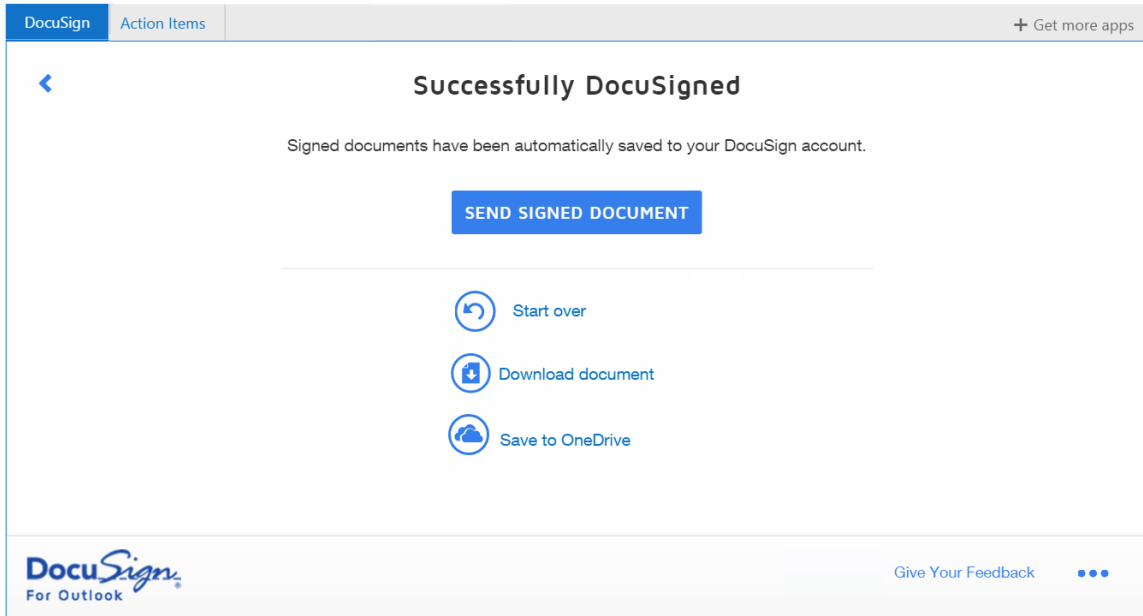


6. The DocuSign signing experience opens in a new window. To add a signature, initial, or other information to the document, first click **Continue** to review and sign your document.
7. Click on the field you want to place and then drag and drop the field at the appropriate location in the document.



8. If it is the first time you are signing or initialing a document, you are asked to adopt your signature.
9. After you have placed all the fields in the document, click **FINISH** to complete your document signing.

10. You are now prompted to send the document back to the original recipient or save the document.



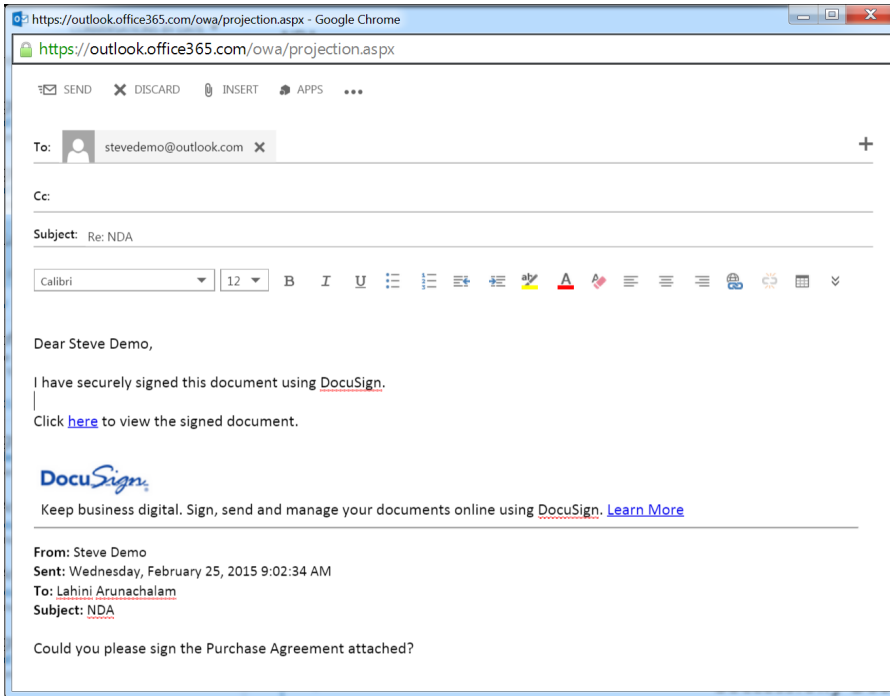
Returning or Saving Signed Documents from DocuSign for Outlook

1. Once you have completed signing a document, you can take 3 different actions:
 - Return the signed attachment(s) to the original recipient
 - Save the signed attachment(s) locally
 - Save the signed attachment(s) to OneDrive

Note: The document is saved as one PDF, regardless of the original file format.

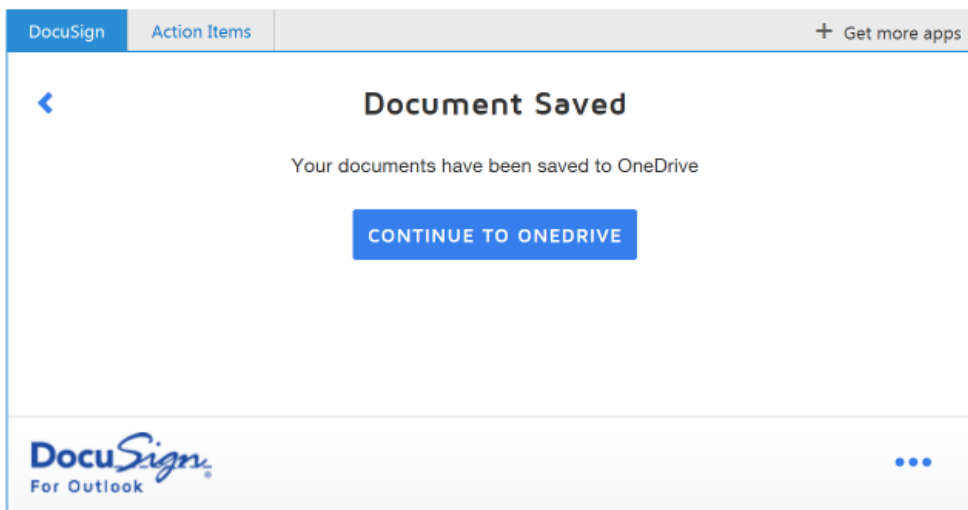
2. If you choose to return the signed attachment(s) to the original recipient, click the **Send Signed Document** button. This will pre-populate an email reply to the original sender with a link to your signed document.

Note: Please disable popup blocking on your browser in order to see the email reply.



3. If you choose to save the signed document locally, click the **Download Documents** button. This will download the signed document to your computer.
4. To upload the signed document to OneDrive, click the **Save to OneDrive** link.

Note: The **Save to OneDrive** option only appears if you logged in to DocuSign using Office 365.



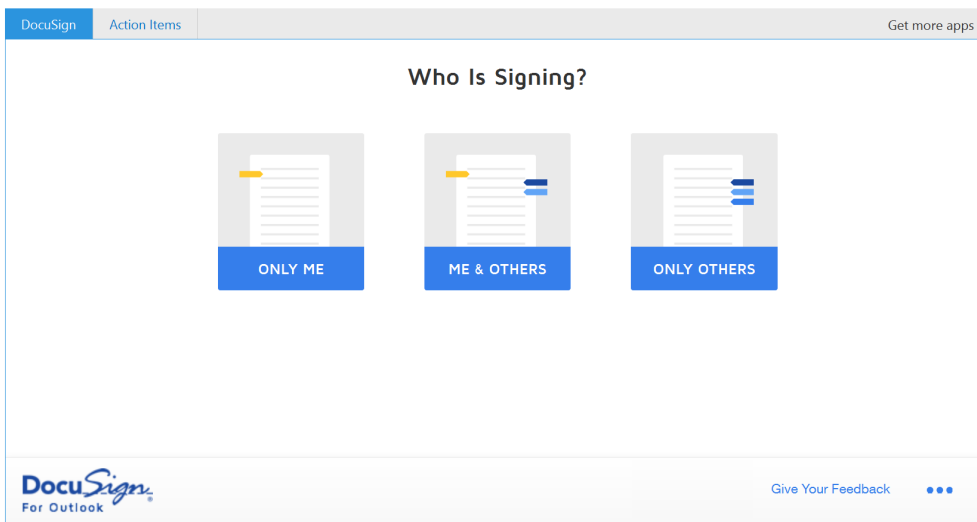
Once you have entered this information, the signed document is automatically saved to OneDrive in a folder called "DocuSign Documents".

5. If you would like to sign attachments in the email message again or send the email attachments to others to sign, click the **Start over** link.

Sending Documents using DocuSign for Outlook

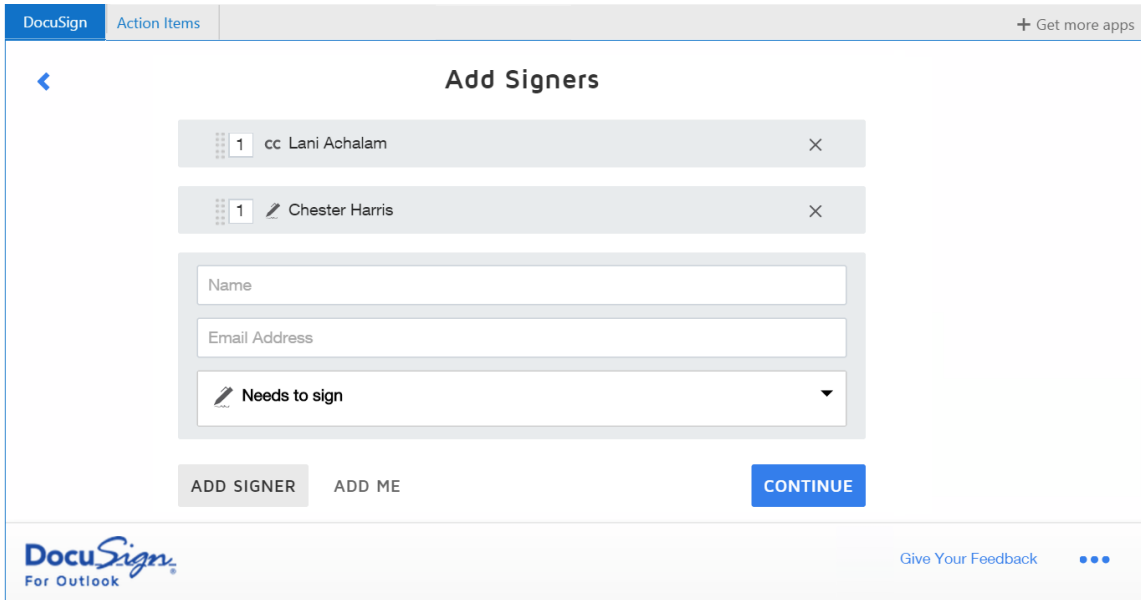
With DocuSign for Outlook, you can now get signatures on email attachments from others directly from an email message in Outlook.

1. Select an email with the attachment(s) you want to send with DocuSign.
2. Open the DocuSign application in the Outlook apps toolbar.
3. If this is the first time you are sending or signing attachments, or you previously logged out of DocuSign, you are asked to log in to an existing account or create a new DocuSign account using your Office 365 credentials.
4. You are prompted to choose who is signing. You can either sign an attachment yourself, get signatures from others, or specify that you and others need to sign the attachment. Since you would like to get signatures from others, choose the **Only Others** or **Me & Others** option.



5. Select the attachments on which you want to get signatures. If there is only one attachment on the email message, you will not see this prompt.

- You are prompted to specify signers for the attachment. Enter the first signer's name, email address, and indicate whether they should sign the attachment or receive a copy. Then click **Add Signer**. You should see the recipient's name at the top. When you are finished, click **Continue**. Note that the sender of the original document is added as a CC recipient of the document. This means that he or she automatically receives a copy of the signed document.



The screenshot displays the 'Add Signers' screen within the DocuSign for Outlook application. At the top, there is a navigation bar with 'DocuSign' and 'Action Items' tabs, and a '+ Get more apps' link. The main content area is titled 'Add Signers' and features a list of two signers: 'cc Lani Achalam' and 'Chester Harris'. Each entry includes a small '1' icon and a close 'X' button. Below the list are three input fields: 'Name', 'Email Address', and a dropdown menu currently set to 'Needs to sign'. At the bottom of the form, there are three buttons: 'ADD SIGNER', 'ADD ME', and 'CONTINUE'. The footer contains the DocuSign logo and the text 'For Outlook', along with a 'Give Your Feedback' link and a three-dot menu icon.

- Now you can enter an email subject and message that all recipients of the document will receive. Note that the email subject is populated from the original email. Add this information and click **Go to DocuSign**.
- A new browser tab opens with the DocuSign sending experience. The selected email attachments are automatically included as the document to send.

Drag and drop DocuSign fields from the left-hand palette onto your document. You can modify other information by clicking the following:

- **Recipients Edit** - to add, remove, or modify recipients
- **Message** - to change the e-mail subject and message
- **Documents Edit** - to add or remove the documents

Refer to the [DocuSign help](#) for more details about sending your document.

Click **Send** to send the document for signing.

The document is sent and the DocuSign for Outlook application shows a success screen where you can re-send your documents or track the status of the documents in DocuSign.

- Done!

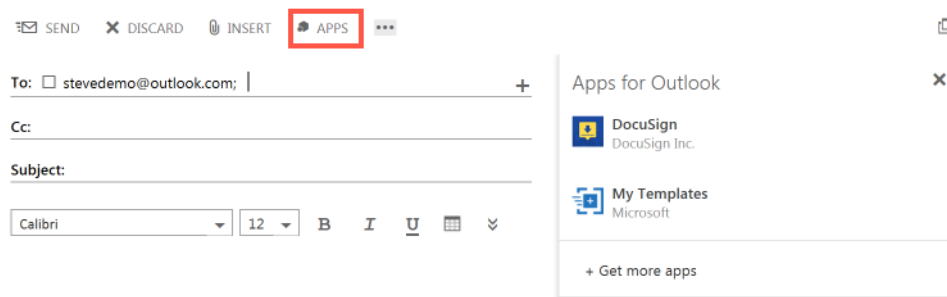
You have successfully sent documents out for signature with DocuSign.

Sending Documents using the New Mail or Reply Window with DocuSign for Outlook

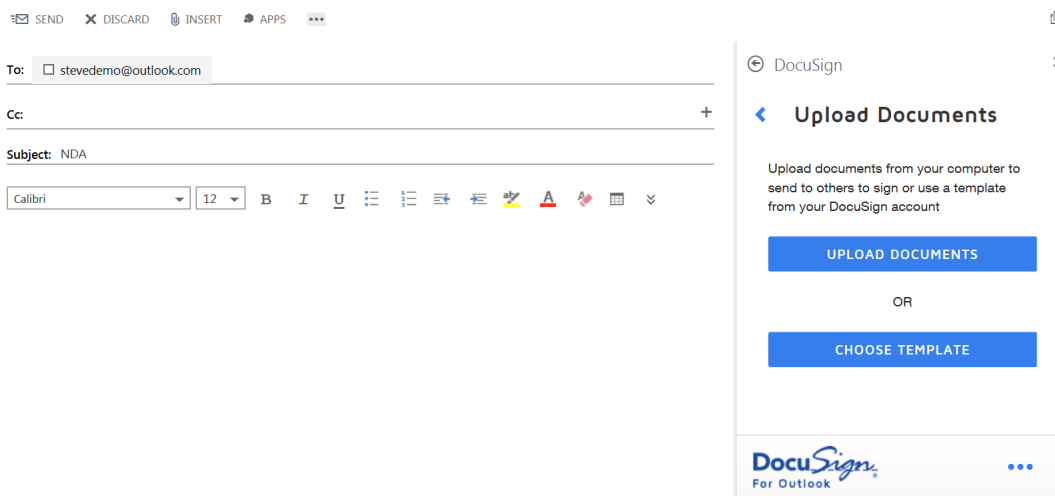
With DocuSign for Outlook, you can now initiate the signing process on any document directly from the new mail/reply window in Outlook — just like you would start a new email.

Note: This option is not available on the Mac. It is only available for the Windows and Online versions.

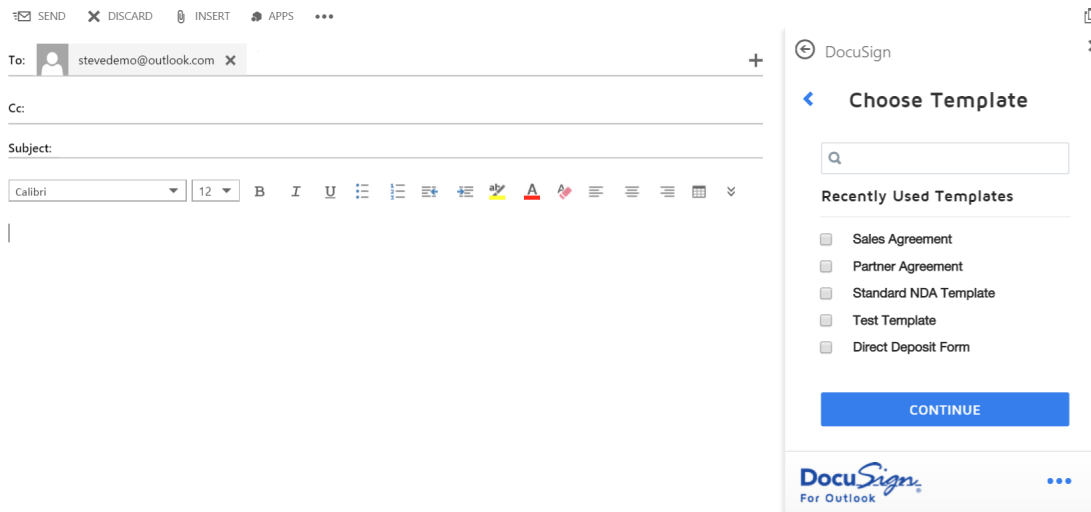
1. Click **+ New Mail** or reply to an existing email message in Outlook
2. Open the DocuSign for Outlook app by clicking **Apps** in the message bar



3. Click the DocuSign for Outlook application under “Apps for Outlook”
4. If this is the first time you are using the app, or you previously logged out of DocuSign, you are asked to log in to an existing account or create a new DocuSign account using your Office 365 credentials.
5. You are prompted to upload a document from your computer that you would like others to sign or choose a template from your DocuSign account to send to others to sign.



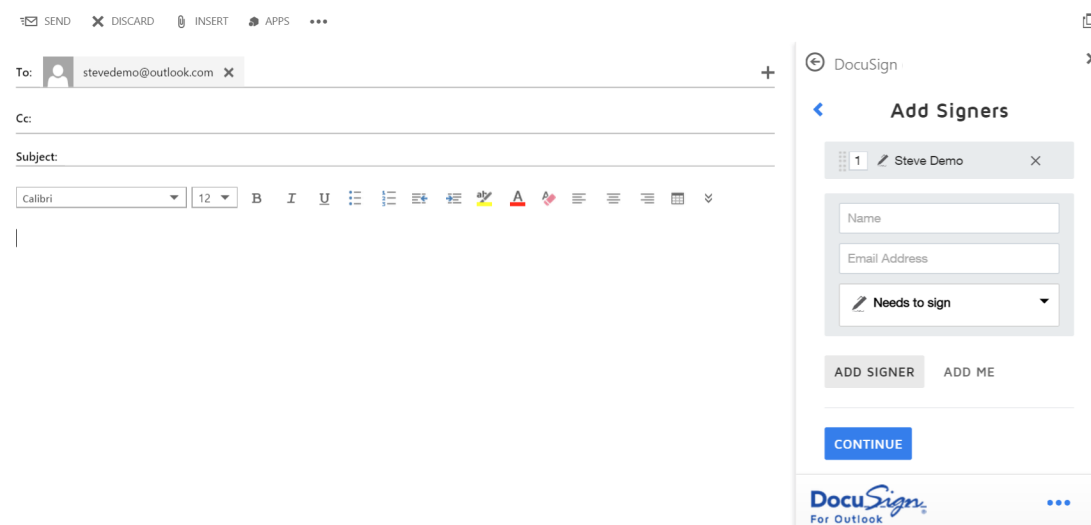
If you click **Choose Template**, you will have the option to select one or more templates from your DocuSign account. Recently used templates are displayed in a list and you can use the search bar at the top of the app to find a specific template. Click **Continue** after selecting the template.



- You are prompted to specify signers for the attachment. Note that any email recipients added are automatically populated as signers or CC recipients on the document. To add a new signer, enter the first signer's name, email address, and indicate whether they should sign the attachment or receive a copy. Then click **Add Signer**. You should see the recipient's name at the top.

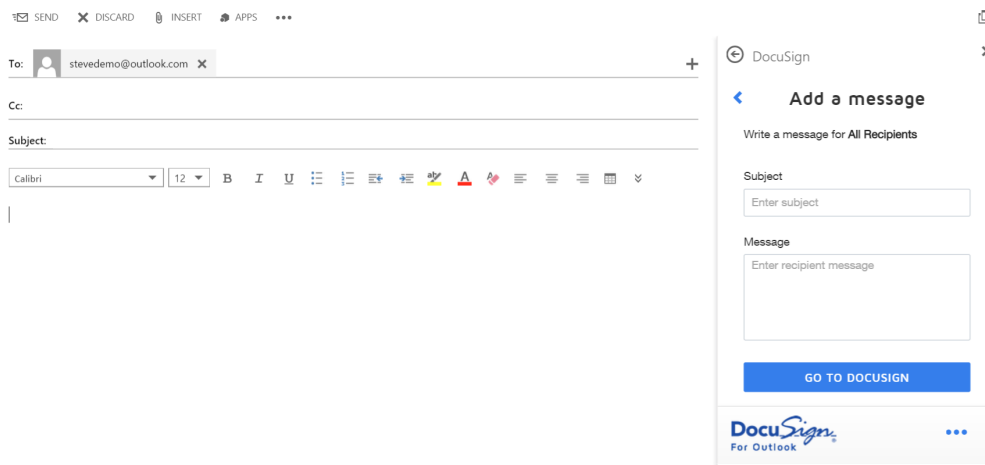
If you are using a DocuSign template, the signing roles and specific signers may be pre-populated as defined by the template workflow. Signers that have been pre-defined will display as read-only and cannot be changed.

When you are finished, click **Continue**.

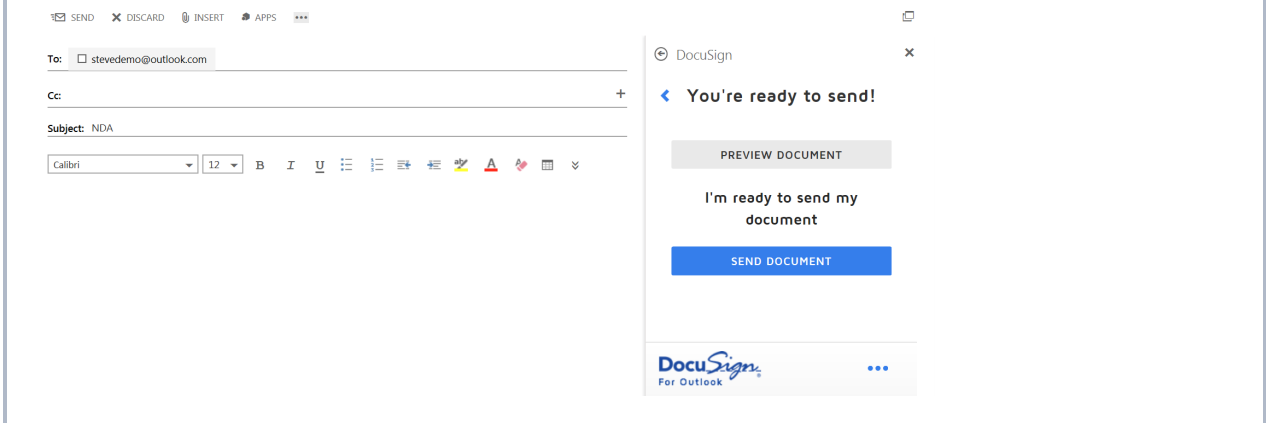


- Now you can enter an email subject and message that all recipients of the document will receive. Note that the email subject is populated from the reply/new mail if you are uploading a new document, or from the workflow if you are using a DocuSign template.

Add this information and click **Continue**.

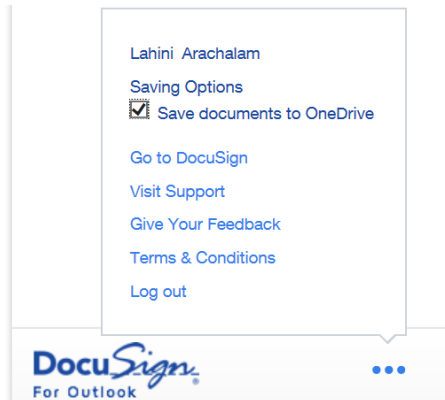


Note: If you are using a DocuSign template, you will see an option that allows you to send the document without going to DocuSign at all; to do so, click **Send Document**. To preview the document in DocuSign before sending it, click **Preview Document**.



If this is your first time using DocuSign for Outlook and you have logged in with Office 365, you can choose your OneDrive for Business Preferences. This action allows the app to save signed DocuSign documents to OneDrive for Business. When you have specified your choice, click **Continue** or **Go to DocuSign**.

- You can always change these preferences by going to the menu in the lower right hand corner and updating the Save documents to OneDrive option.



8. If you chose **Go to DocuSign** or **Preview Document**, a new browser tab opens with the DocuSign sending experience. The documents you uploaded are included as the document to send. Drag and drop DocuSign fields from the left-hand palette onto your document. You can modify other information by clicking the following:

- **Recipients Edit** - to add, remove, or modify recipients
- **Message** - to change the e-mail subject and message
- **Documents Edit** - to add or remove the documents

Refer to the [DocuSign help](#) for more details about sending your document.

Click **Send** to send the document for signing.

The document is sent and the DocuSign for Outlook application shows a success screen where you can re-send your documents or track the status of the documents in DocuSign.

9. Done!

You have successfully sent documents out for signature with DocuSign.

FAQ

When does the DocuSign application appear in the Outlook apps toolbar?

- The DocuSign application appears in the toolbar when an attachment is included in an email message.

What happens when I create a DocuSign account using my Office 365 credentials?

- A new DocuSign account with 10 free document sends is created. If you run out of document sends, please contact your system administrator to upgrade your account to a paid DocuSign account.

If I am an admin of Office 365 and would like to upgrade to a paid DocuSign account, what do I do?

- Contact our sales team at sales@docusign.com or 1.877.720.2040.

Why do I have to log in to DocuSign to sign or get signatures on an email attachment?

- Since DocuSign is a secure and legal service, we verify identity before allowing you to sign a document in Office 365. Then, all of your signed documents are automatically stored back into your DocuSign account for easy access.

I clicked the link to send the signed attachment back to the sender. Nothing happens. Why?

- Ensure that you have popup blocking disabled in your browser for the website. Outlook WebApp replies are brought up as new windows.

Where is my signed document saved in OneDrive?

- The signed document is saved in a designated folder called "DocuSign Documents".

How many times can I sign an attachment?

- You can sign an attachment as many times as you would like. Each signed PDF is saved as a different signed document in your DocuSign account.

How do I change the signature I adopted?

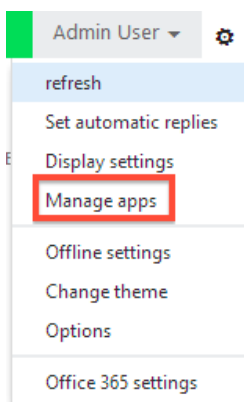
- Within DocuSign for Outlook, navigate to the menu in the upper left hand corner. Select **Go to DocuSign**. The DocuSign home page appears. Click **Preferences** and **Manage Identity** to adopt a new signature.

I do not see the templates option in the new mail/reply window in Outlook. Why?

- If you do not see the **Choose Template** option in the new mail/reply window in Outlook, your DocuSign account is not enabled with the templates feature. Contact sales@docusign.com for more information.


How do I disable or uninstall DocuSign for Outlook?

- Within Office 365, go to the menu in the upper right hand corner and select "manage apps".



Select DocuSign for Outlook and click the **Disable** link on the right hand side. Once it is disabled, you will no longer see the DocuSign application in the Outlook apps toolbar.

Select the garbage can icon in the top toolbar to uninstall the application.



Name	Provider	Installed by	Enabled
DocuSign	DocuSign Inc.	User	Yes
Bing Maps	Microsoft	Default	Yes
My Templates	Microsoft	Default	Yes
Suggested Meetings	Microsoft	Default	Yes
Unsubscribe	Microsoft	Default	Yes
Action Items	Microsoft	Default	Yes

Can I use DocuSign for Outlook with Outlook 2013?

- Yes, with version 1.2 and higher you can use DocuSign for Outlook with Outlook 2013.

How do I give feedback on DocuSign for Outlook?

- Within DocuSign for Outlook, navigate to the menu in the upper left hand corner. Select **Send Feedback**. This will generate an email to outlookwebfeedback@docusign.com. Thanks for your feedback!

I love this! How do I leave a review?

- Go to the DocuSign for Outlook listing on the Office.com Store. Click the **Reviews** tab and **Write your own review**. Thanks for sharing your ideas with us!

For More Information or Assistance

For more information or assistance, visit [DocuSign Support](#), the [DocuSign Community](#), docusign.com, or contact DocuSign Support.

Release Notes

The following changes were made as a part of DocuSign for Outlook v5.2:

- Improved support for lower screen resolutions
- Improved performance when there is an attachment.
- Added support for Outlook 2016 (Windows and Mac).