

## DocuSign for Word — v3.1.2

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### Overview

DocuSign for Word allows users to send or sign documents created or edited in Word.

Users with an existing account can log in with their DocuSign credentials. New users to DocuSign can sign up for a free trial from within the Word app by joining DocuSign using their Office 365 credentials or Microsoft credentials. A free trial created using your Office 365 credentials allows each individual to have an unlimited number of sign and returns, and up to 10 free DocuSign document sends. A free trial created using your Microsoft credentials allows each individual to have an unlimited number of sign and returns, and up to 5 free DocuSign document sends.

This guide provides information on opening, sending, and signing documents from DocuSign for Word.

Supported Versions: Word 2013 desktop client (Windows only) and Word for iPad

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

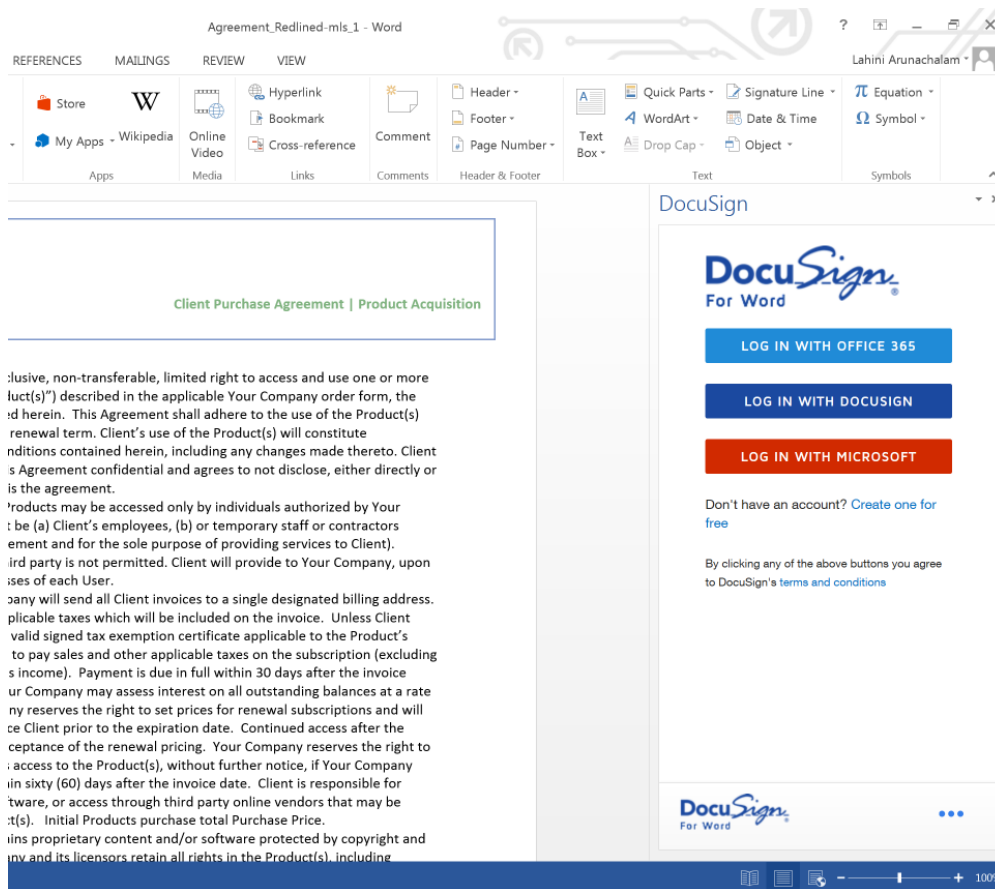
Chinese (Simplified), Chinese (Traditional), Dutch, English, French, German, Italian, Japanese, Korean, Portuguese (Brazil), Portuguese (Portugal), Russian, and Spanish

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# Opening DocuSign for Word

DocuSign for Word is available from the [Office.com](https://www.office.com) Store. Follow these steps to insert DocuSign for Word:

1. Open or create a new Microsoft Word document.
2. In the top ribbon click **Insert** and under My Apps, click **See All...**
3. Click the **STORE** tab in the **My Apps** dialog, and enter "DocuSign" in the search bar.
4. Click the **DocuSign for Word** application and click **Trust It**.
5. This will open DocuSign for Word in the application panel on the right-hand side of your document.



# Sending Documents using DocuSign for Word

With DocuSign for Word, you can send documents out for signature directly from the application panel in Word.

1. Edit and save your Word document.
2. Choose how you would like to log into DocuSign.
  - You can log in using your Office 365 credentials.
  - You can log in with your Microsoft credentials (these credentials correspond to an email address and password you use to log in to Outlook.com, Xbox LIVE, OneDrive, or Windows Phone).
  - You can log in with existing DocuSign account by clicking **Log in with DocuSign** and entering your email and password.
  - If you do not have an account, you can create a new one by using Office 365 credentials or Microsoft credentials.
    - Creating a new account using Office 365 credentials gives you up to 10 free document sends and an unlimited number of sign and returns.
    - Creating a new account using Microsoft credentials gives you up to 5 free document sends and an unlimited number of sign and returns.



LOG IN WITH OFFICE 365

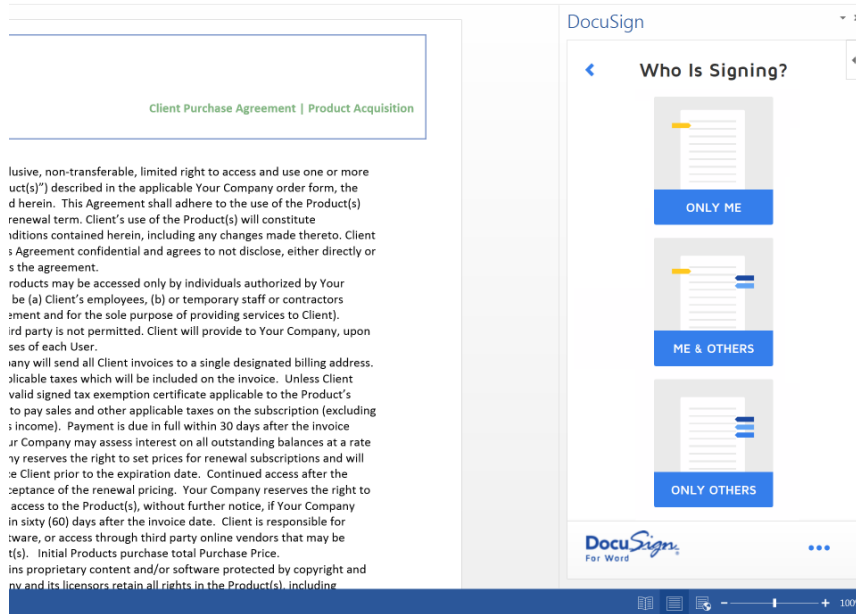
LOG IN WITH DOCUSIGN

LOG IN WITH MICROSOFT

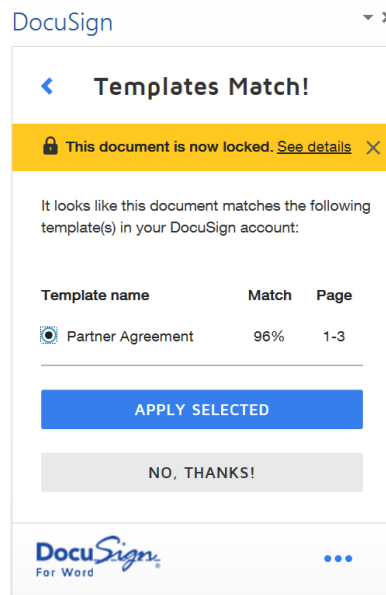
Don't have an account? [Create one for free](#)

By clicking any of the above buttons you agree to DocuSign's [terms and conditions](#)

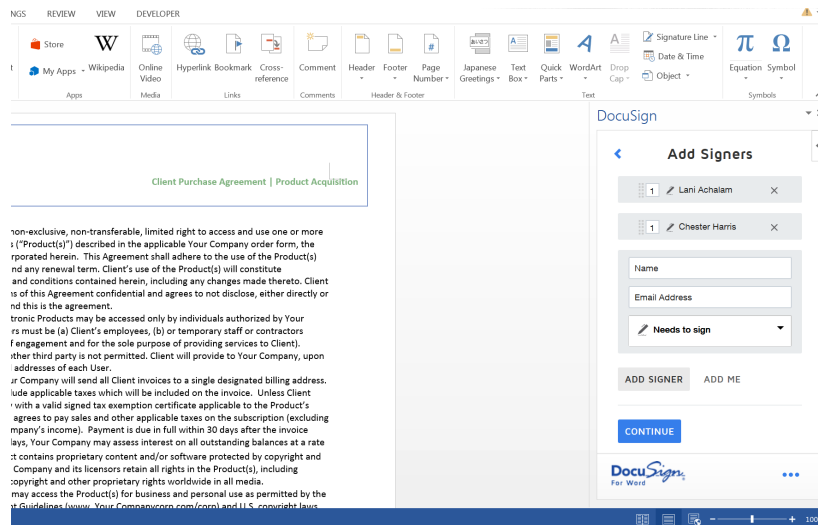
- You are prompted to choose who is signing. Since you need others to sign, select **Only Others** or **Me & Others** option



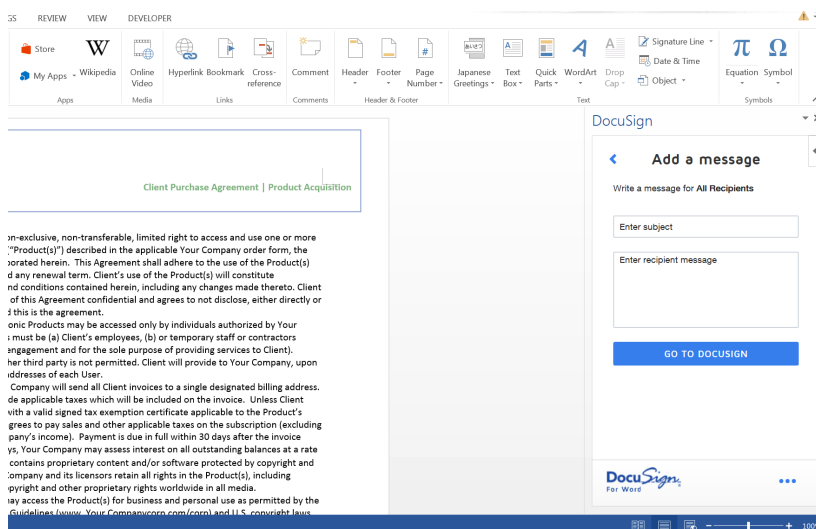
If your document matches a template in your DocuSign account, you will see a prompt that allows you to apply the template to the document. This means that the signing workflow and tags will be pre-defined as specified by the template in DocuSign. Any changes you make to the document in Word will no longer be reflected in DocuSign if you choose to apply the template match. To make changes to the document after this point, click the back arrow on the top left corner of the application pane.



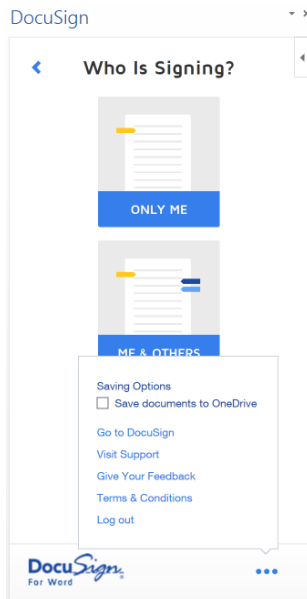
- You are prompted to specify signers for the document. Enter the first signer's name, email address, and indicate whether they should sign the document or receive a copy. Then click **Add signer**. You should see the signer's name at the top. When you are finished, click **Continue**. If you are using a DocuSign template, the signing roles and specific signers might be pre-populated as defined by the template workflow. Signers that have been pre-defined display as read-only and cannot be changed.
  - If you would like to add yourself as a recipient, click **Add me**.
  - You can add as many recipients as you would like to the document.



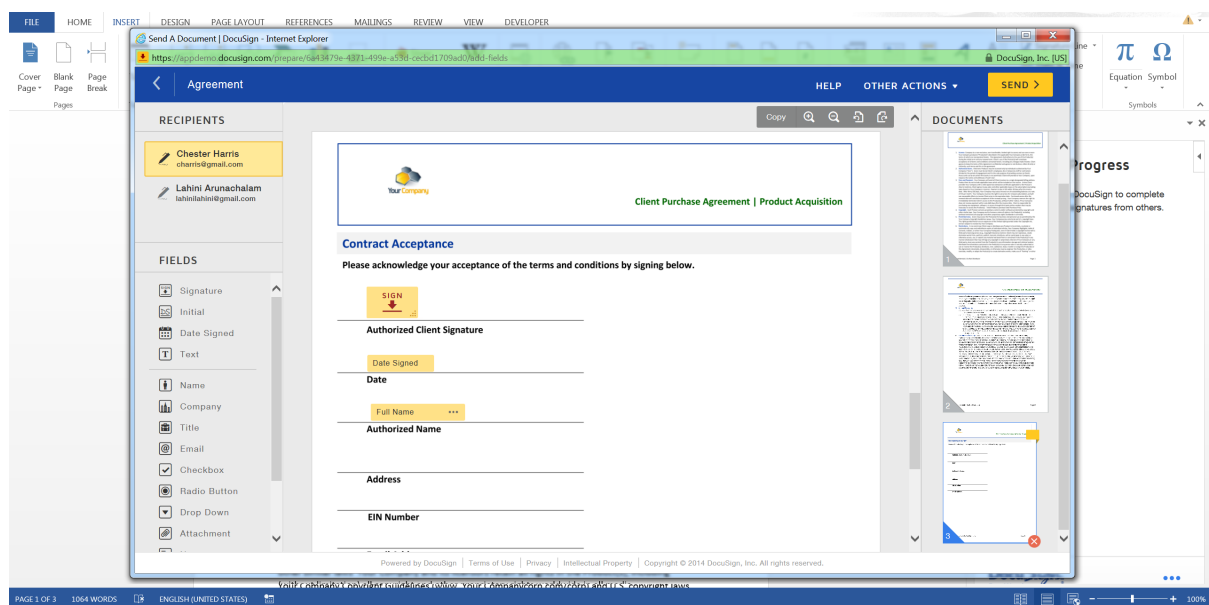
- Now you can enter an email subject and message that all recipients of the document will receive. Add this information and click **Continue**. Note that the email subject is populated from the reply/new mail if you are uploading a new document, or from the workflow if you are using a DocuSign template.



6. If this is your first time using DocuSign for Word 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.. If this is your first time using DocuSign for Word and you have logged in with a Microsoft ID, you can choose your OneDrive preferences This action allows the app to save signed DocuSign documents to OneDrive. When you have specified your choice, click **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.



7. The DocuSign sending experience opens in a new browser window. The document from Word is automatically included as the document being sent.



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

- **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.

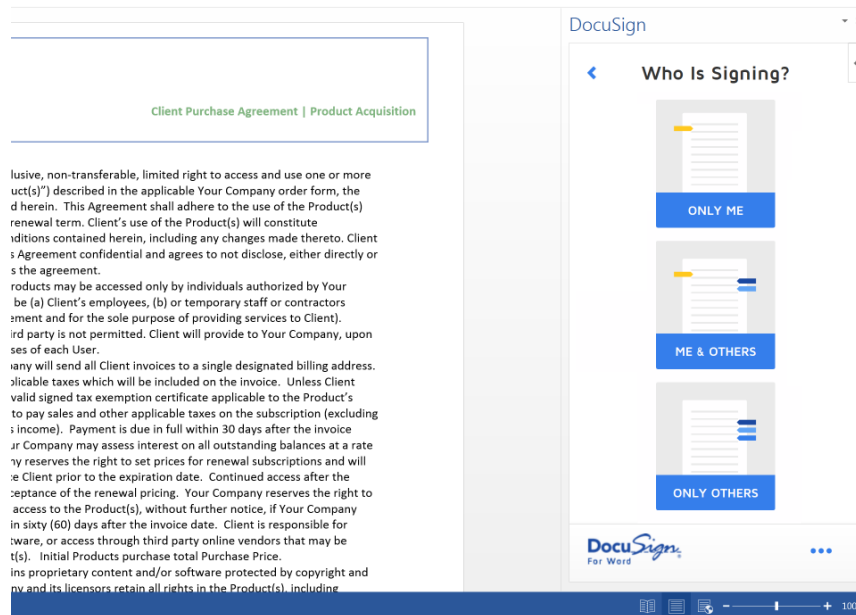
Your document is sent and the DocuSign for Word application shows a success screen where you can re-send your documents or track the status of the documents in DocuSign.

## 8. Done!

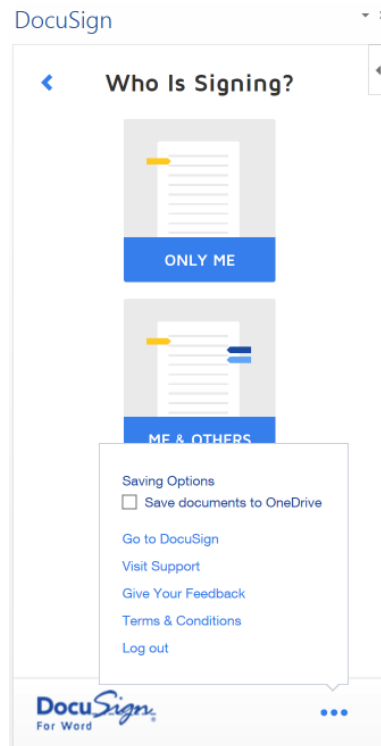
You have successfully sent documents out for signature with DocuSign.

# Signing Documents with DocuSign for Word

1. Edit and save your Word document.
2. You are prompted to choose who is signing. Since you are the only one signing, choose the **Only Me** option.



3. If this is the first time you are using DocuSign for Word 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.. If this is your first time using DocuSign for Word and you have logged in with a Microsoft ID, you can choose your OneDrive preferences This action allows the app to save signed DocuSign documents to OneDrive. When you have specified your choice, click **Go to DocuSign**.

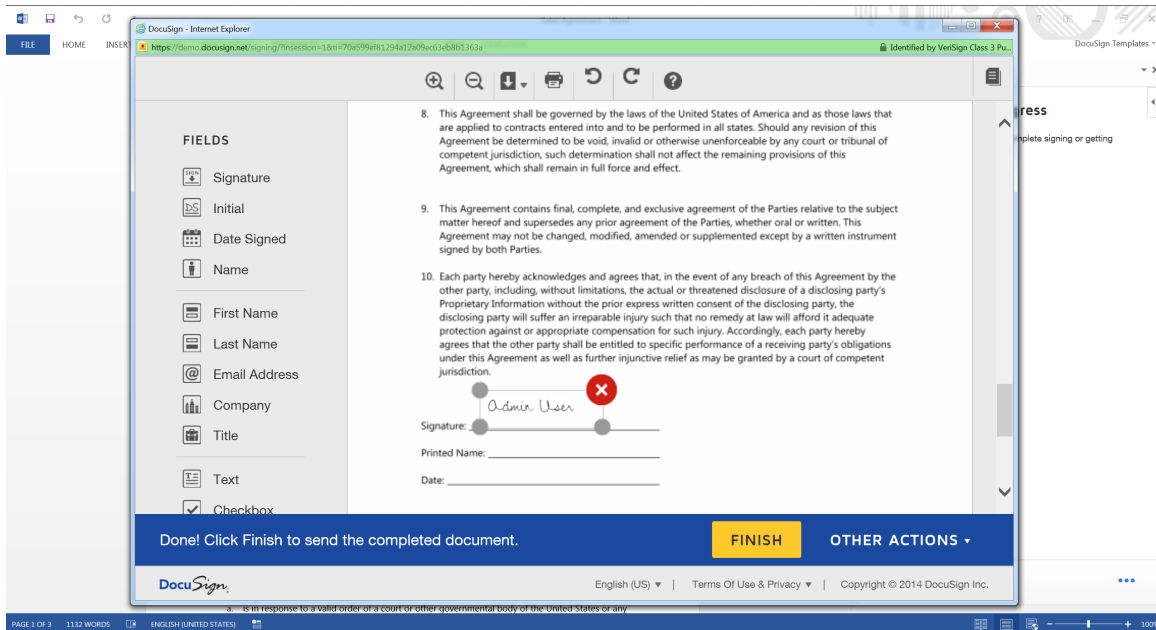



4. A new page opens with DocuSign free-form signing.
5. Sign the document.

To add a signature, initial, or other information to the document, first click **Continue** to review and sign your document.



Click on the field you want to place and then drag and drop the field at the appropriate location in the document.



6. After you have placed all the fields in the document, click  to complete your document. The DocuSign for Word application shows a success screen where you can send your documents or track the status of the documents in DocuSign.
7. Done!  
You have successfully signed documents with DocuSign.

## FAQ

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

- A new DocuSign account with 10 free document sends per user in your organization is created. If you run out of document sends, you must contact your Office 365 account admin to upgrade your account to a paid DocuSign account.

### What happens when I create a DocuSign account using my Microsoft credentials ?

- A new DocuSign account with 5 free document sends per user in your organization is created. If you run out of document sends, you must upgrade your account to a paid DocuSign account. You can do this by clicking **Buy Now** on the web or by contacting our sales team at [sales@docusign.com](mailto:sales@docusign.com) or 1.877.720.2040.

### 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](mailto:sales@docusign.com) or 1.877.720.2040.

### What is the difference between "Send" and "Sign" with DocuSign?

- Send with DocuSign is used when you want to send a document, or documents, to one or more people to gather signatures or information from those people. You, as the sender, can also be a signer on documents, but you do not have to be. Sign with DocuSign is used when you just want to sign something yourself that can be delivered to someone else.

Using the Sign with DocuSign option only takes you to the signing page in DocuSign, while the Send with DocuSign lets you add signers and tag the document for sending.

### Can I use DocuSign for Word with Word Web App?

- DocuSign for Word can be used with Microsoft Word 2013 desktop and Word for iPad.

### I love this! How do I leave a review?

- Go to the DocuSign for Word 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](http://docusign.com), or contact DocuSign Support.

## Release Notes

The following features were included as a part of DocuSign for Word v3.1.2:

- Adding support for Word for iPad