

DocuSign for Outlook (Windows) v2.1

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Overview

With DocuSign for Outlook, users can sign and return email attachments directly from the Outlook desktop client. The DocuSign for Outlook connector is available for Outlook 2007, Outlook 2010, and Outlook 2013.

Users with an existing account can log in with their DocuSign credentials. New users to DocuSign can signup for a free trial from within the Outlook connector. This free trial allows for an unlimited number of sign and returns, and up to 5 free DocuSign envelope sends.

This guide provides information on installing and signing documents with DocuSign for Outlook.

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Installing DocuSign for Outlook

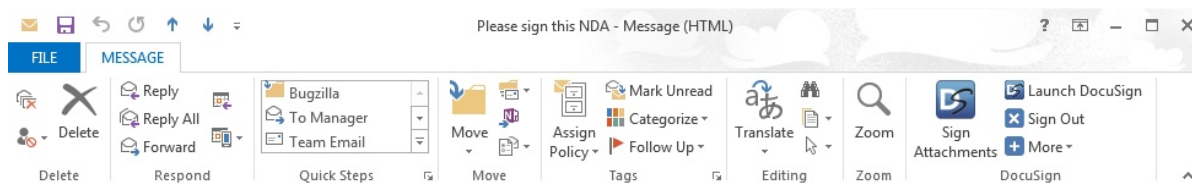
The DocuSign for Outlook package is available from the DocuSign Partner Solutions Showcase. Follow these steps to download and install the package:

1. To get the DocuSign for Outlook package:
 - a. Go to the [DocuSign for Outlook \(Windows\)](#) page on the DocuSign website.
 - b. Click **DOWNLOAD** to download the package as an .msi file to your computer.
2. To install the package:
 - a. Double click the .msi file to launch the DocuSign for Outlook Setup Wizard.
 - b. Follow the on-screen instructions.
 - c. Once DocuSign for Outlook has been successfully installed, click **Close** to exit the Setup Wizard.

DocuSign for Outlook is installed and the DocuSign group is added to your Outlook ribbon.

Signing Email Attachments with DocuSign for Outlook

When you open Outlook after DocuSign for Outlook has been installed successfully, you see the DocuSign group integrated into the application and email ribbon bar:



Supported File Formats

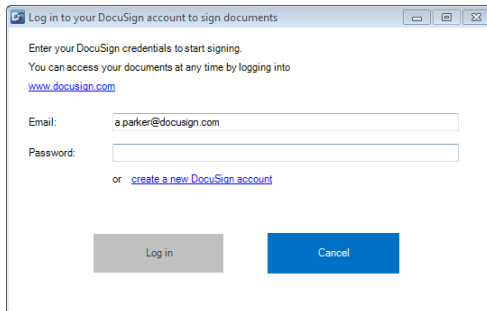
DocuSign for Outlook supports the following file formats for signing:

- **Document:** .pdf, .doc, .docx, .rtf, .txt
- **Spreadsheet:** .xls, .xlsx
- **Presentation:** .ppt, .pptx
- **Image:** .jpg, .png, .tiff, .gif
- **Webpage:** .htm, .html

To sign an attachment

1. Select the email with the attachment(s) you want to sign with DocuSign.
2. Click **Sign Attachments** on the Outlook ribbon bar.

- If this is the first time you are signing attachments, or you previously logged out of DocuSign, you are asked to log in or create a new account:



Log in to your DocuSign account to sign documents

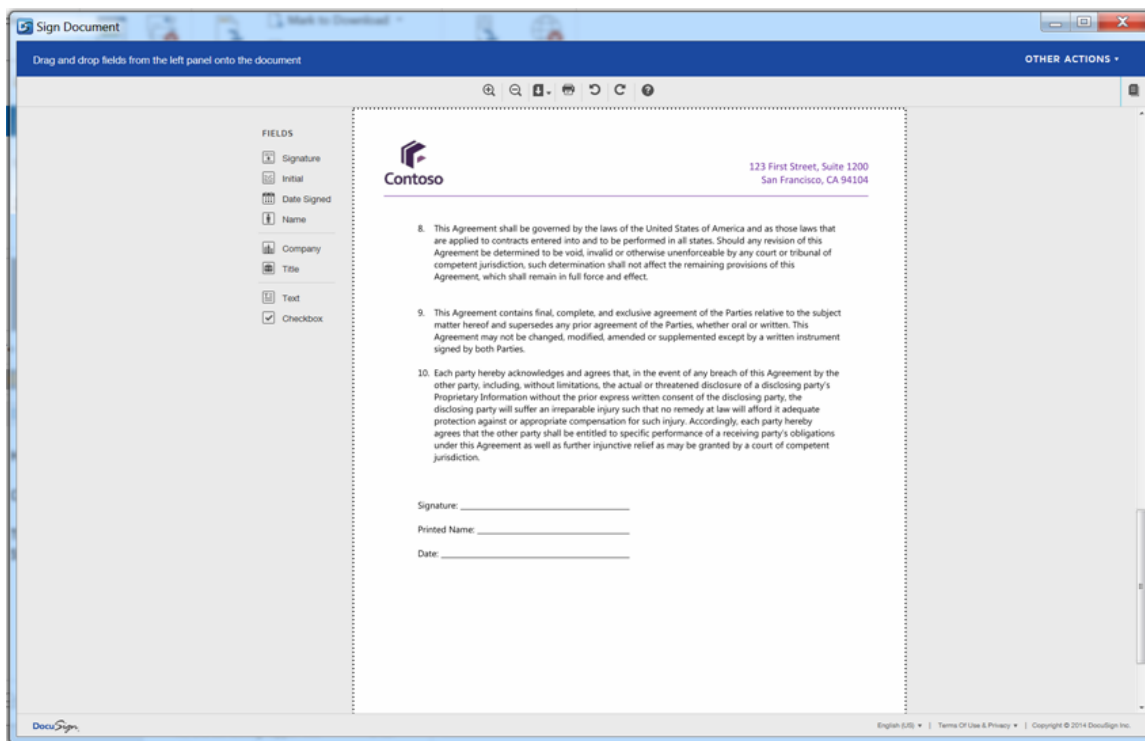
Enter your DocuSign credentials to start signing.
You can access your documents at any time by logging into www.docusign.com

Email:

Password:

or [create a new DocuSign account](#)

- To add a signature, initial, or other information to the document, first click **Continue** to review and sign your document.
- Click on the tag you want to place and then drag and drop the tag at the appropriate location in the document.



Sign Document

Drag and drop fields from the left panel onto the document

OTHER ACTIONS ▾

FIELDS

- Signature
- Initial
- Date Signed
- Name
- Company
- Title
- Text
- Checkbox

Contoso

123 First Street, Suite 1200
San Francisco, CA 94104

8. This Agreement shall be governed by the laws of the United States of America and as those laws that are applied to contracts entered into and to be performed in all states. Should any revision of this Agreement be determined to be void, invalid or otherwise unenforceable by any court or tribunal of competent jurisdiction, such determination shall not affect the remaining provisions of this Agreement, which shall remain in full force and effect.

9. This Agreement contains final, complete, and exclusive agreement of the Parties relative to the subject matter hereof and supersedes any prior agreement of the Parties, whether oral or written. This Agreement may not be changed, modified, amended or supplemented except by a written instrument signed by both Parties.

10. Each party hereby acknowledges and agrees that, in the event of any breach of this Agreement by the other party, including, without limitations, the actual or threatened disclosure of a disclosing party's Proprietary Information without the prior express written consent of the disclosing party, the disclosing party will suffer an irreparable injury such that no remedy at law will afford it adequate protection against or appropriate compensation for such injury. Accordingly, each party hereby agrees that the other party shall be entitled to specific performance of a receiving party's obligations under this Agreement as well as further injunctive relief as may be granted by a court of competent jurisdiction.

Signature: _____

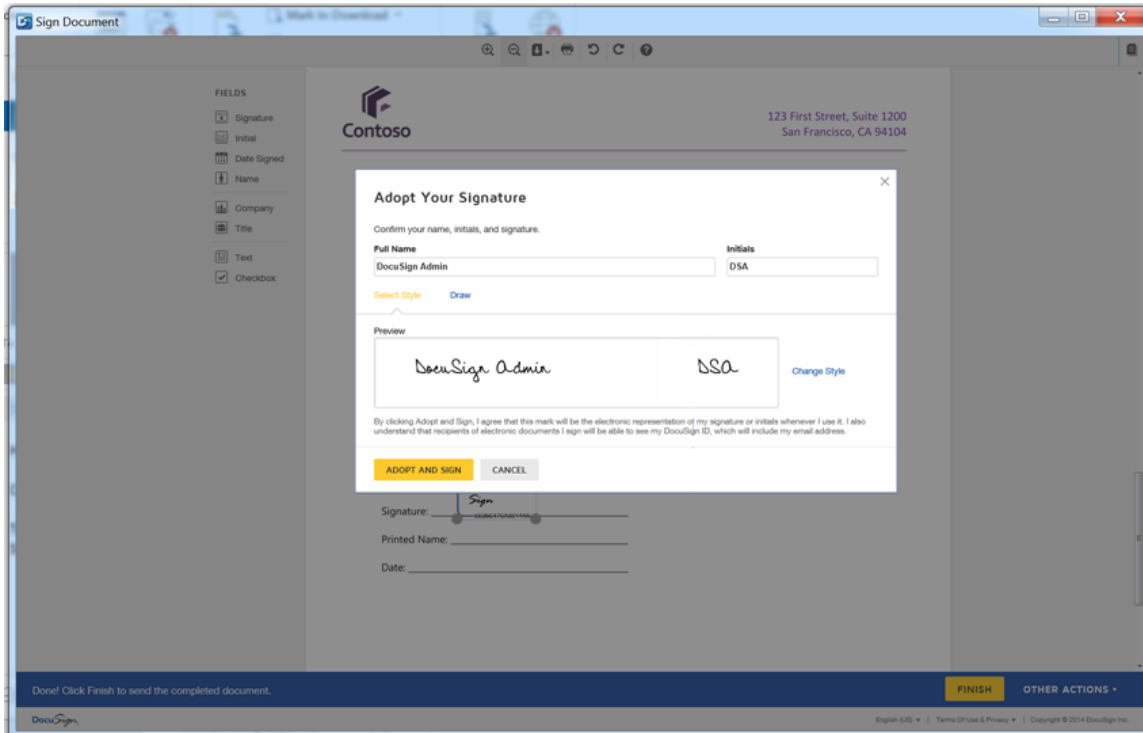
Printed Name: _____

Date: _____

DocuSign

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- If it is the first time you are signing or initialing a document, you are asked to adopt your signature:



- After you have placed all the tags in the document, click **FINISH** to complete your document signing.
- Outlook generates a reply to the original sender with the signed document included as an attachment.

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

- The document is also saved in your DocuSign account. You can access your signed document at any time through your account, or from your sent email.

Note: You can quickly access your DocuSign account by clicking the **Launch DocuSign** button on the Outlook ribbon.

FAQ

How do I change the signature I adopted?

- In the DocuSign ribbon bar group, click **More** and select **Manage Identity**. The DocuSign Manage Identity page appears. Click **Edit** to adopt a new signature. You can also select **Privacy Settings** to adjust the information you share with other DocuSign users.

How do I uninstall DocuSign for Outlook?

- To uninstall DocuSign for Outlook from your PC, click **Start > Control > Programs**. Select **DocuSign for Outlook** and click **Uninstall**.

How do I give feedback on DocuSign for Outlook?

- In the DocuSign for Outlook ribbon bar group, click **More** and select **Give us your Feedback**. You can also send email to outlookfeedback@docusign.com.

I installed DocuSign for Outlook but I don't see the DocuSign group in the email ribbon bar? (Outlook 2013)

- In Outlook 2013, go to **File** and click **Slow and Disabled Add-Ins**. Under **DocuSign for Outlook**, select **Always enable this add-in**. The DocuSign group should now be visible in your Outlook application and email ribbon bars.

For More Information or Assistance

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