

DocuSign for Outlook Quick Start Guide

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DocuSign for Outlook - 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 they can 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 or reply window — just like they would start a new email.

Users with an existing account can log in with their DocuSign credentials. Users new 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:

- IE11, Edge (current version)
- Chrome (current version)
- Firefox (current version)
- Outlook Web App
- Outlook 2013 (Windows)
- 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. After you have confirmed the application installation, a success screen appears.

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 now have DocuSign for Outlook installed and should 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 you install DocuSign for Outlook successfully, you see the DocuSign application in the gray Outlook apps toolbar in any email that has an attachment.

Supported File Formats and Size

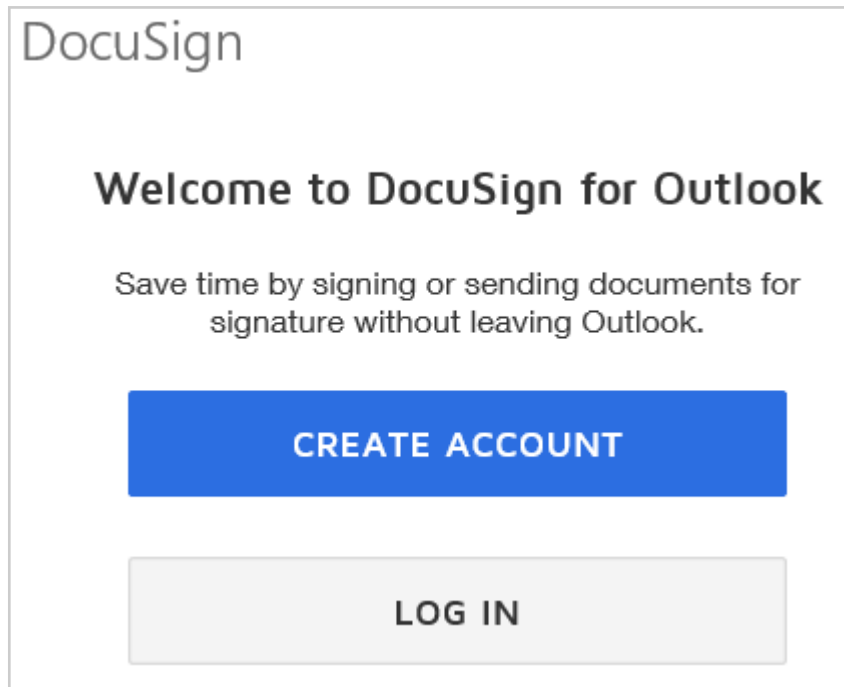
DocuSign for Outlook supports the following file formats:

- **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 or attachments you want to sign with DocuSign.
2. Open the DocuSign application in the gray Outlook apps toolbar.

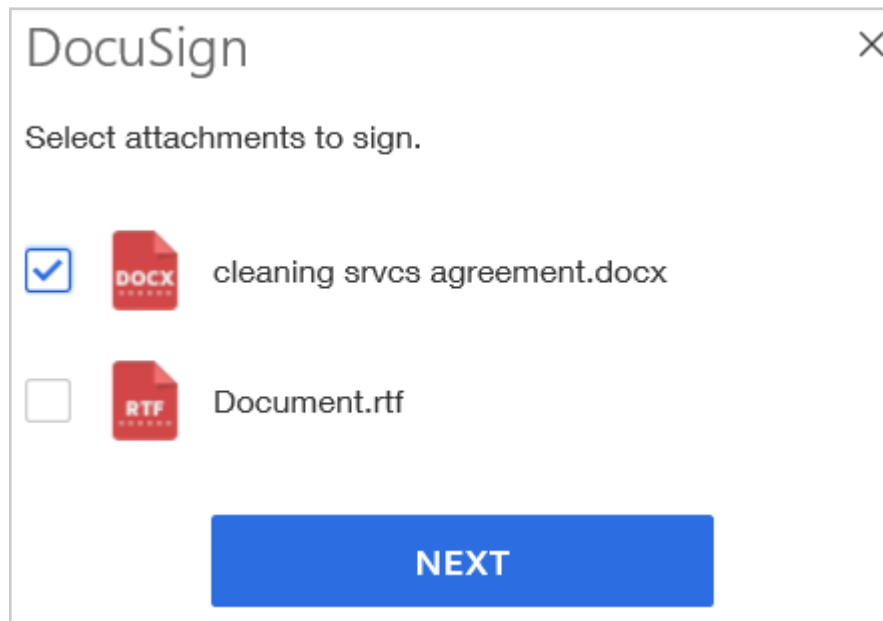
3. If this is the first time you are signing attachments, or you previously logged out of DocuSign, you are asked to log in to an existing account or to create a new DocuSign account using your Office 365 credentials.



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. In this example, you are the only one signing, so choose the **Only Me** option.

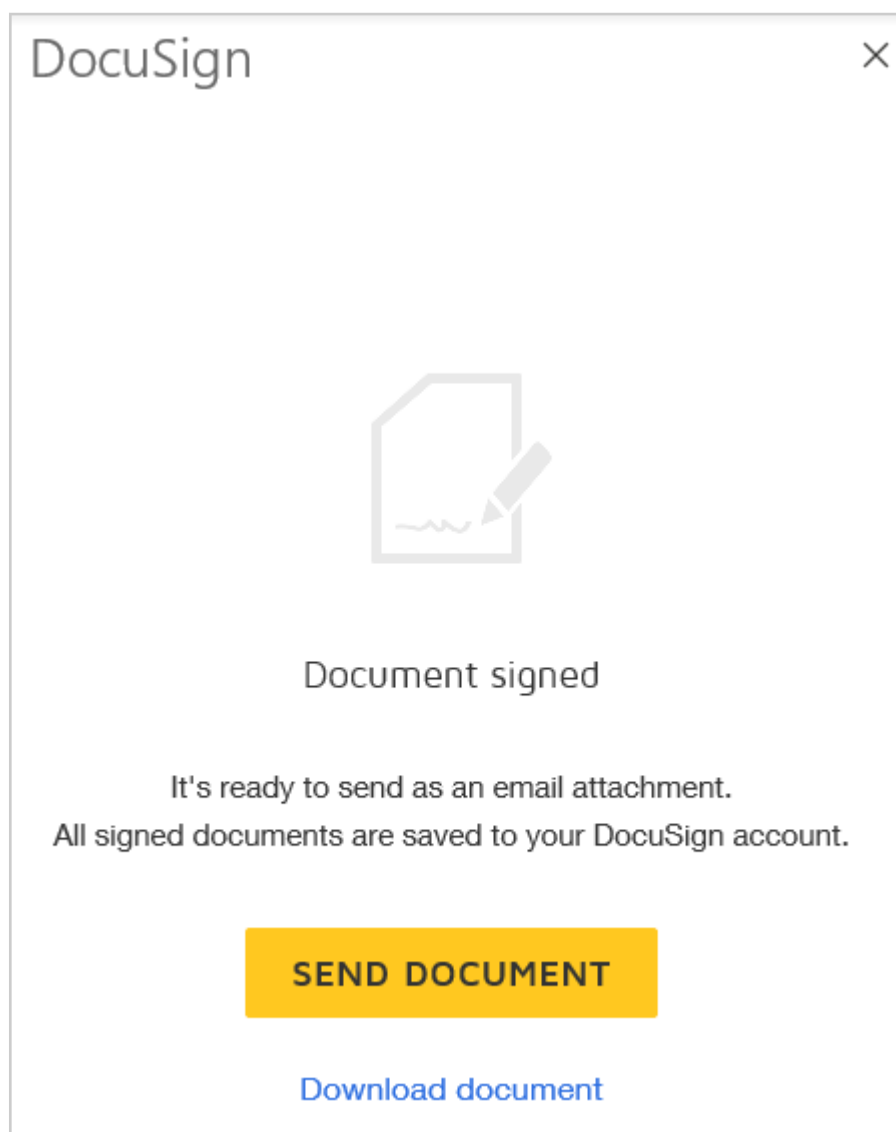
5. Select the attachments you want to sign. All attachments selected will be merged into one document to make signing as fast as possible.

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



6. Click **NEXT** to tag and send the document
7. In the tagging window, add a signature, initial, or other information to the document
8. Click the field you want to place, and then drag and drop the field to the appropriate location in the document.
9. If it is the first time you are signing or initialing a document, you are asked to adopt your signature.
10. After you have placed all the fields in the document, click **NEXT** to complete your document signing.

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



Returning or Saving Signed Documents from DocuSign for Outlook

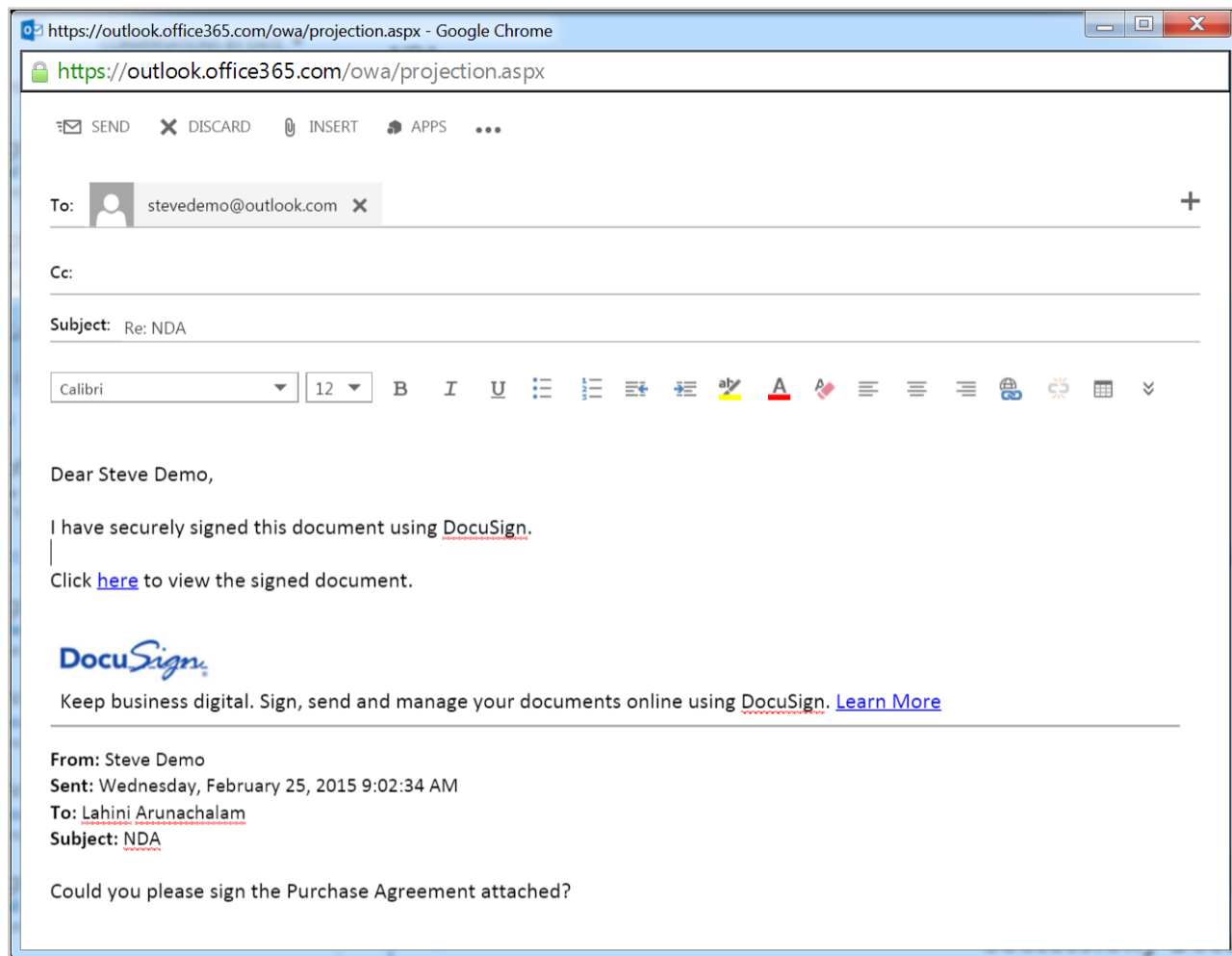
1. After you have completed signing a document, you can take three different actions on the signed attachment or attachments:

- Return them to the original recipient
- Save them locally
- Save them 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 or attachments to the original recipient, click **Send Signed Document**. This pre-populates an email reply to the original sender with a link to your signed document.

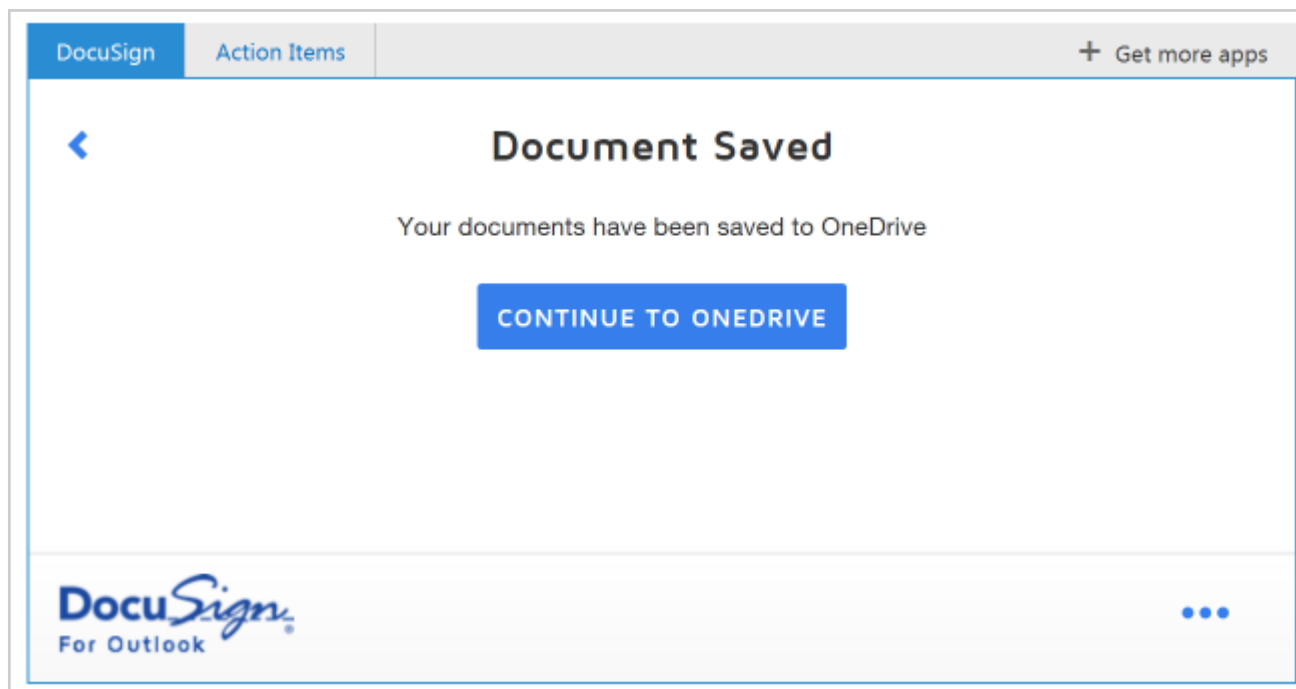
Note: Note: Be sure to disable pop-up blocking on your browser so that you can see the email reply.



3. If you choose to save the signed document locally, click **Download Documents**. This downloads 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.



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

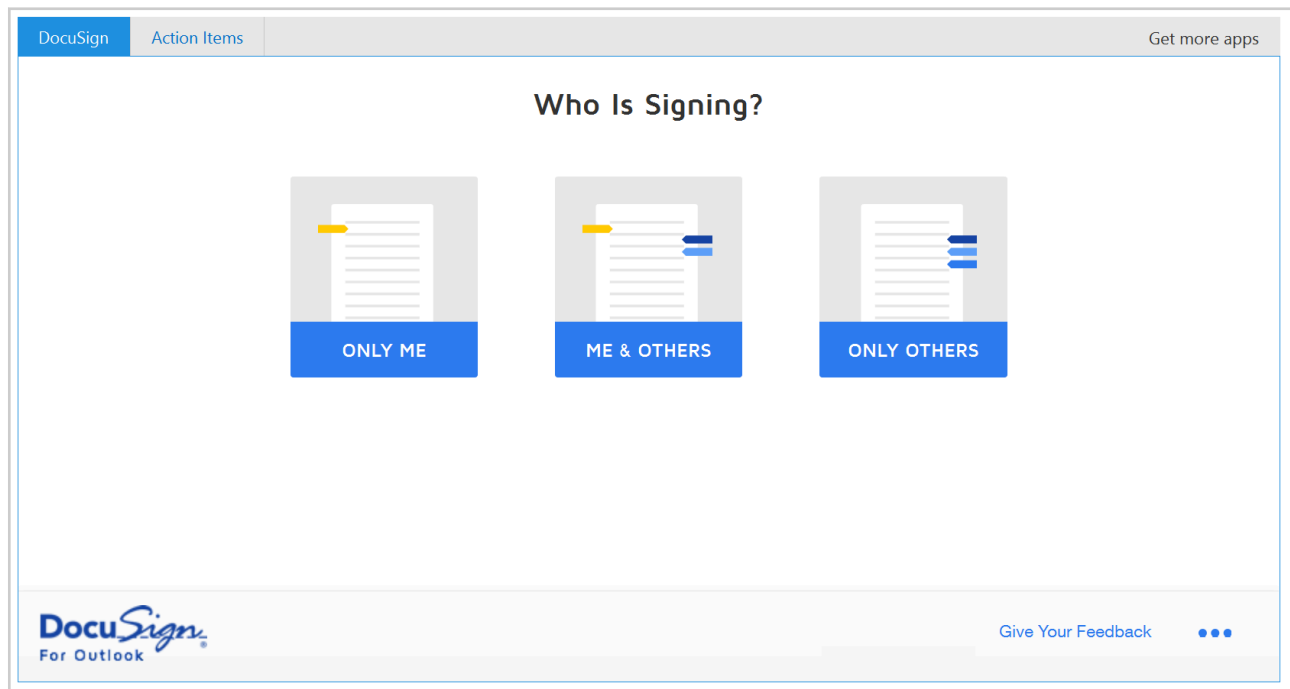
5. If you want to sign attachments in the email message again or send the email attachments to others to sign, click the **Start over** link.

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 or attachments 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 to 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. In this example, you want to get signatures from others, choose either the **Only Others** option or the **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 are not prompted to make a selection.

6. 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, and then click **Add Signer**. You should see the recipient's name at the top. When you are finished, click **Continue**. The sender of the original document is added as a CC recipient of the document. This means that she or he automatically receives a copy of the signed document.

The screenshot shows the 'Add Signers' window in the DocuSign for Outlook application. The window has a header with 'DocuSign' and 'Action Items' tabs, and a '+ Get more apps' link. The main area is titled 'Add Signers' and contains a list of signers. Two signers are already added: 'cc Lani Achalam' and 'Chester Harris'. Below the list are three input fields: 'Name', 'Email Address', and a dropdown menu set to 'Needs to sign'. At the bottom are three buttons: 'ADD SIGNER', 'ADD ME', and 'CONTINUE'. The DocuSign logo and 'For Outlook' text are in the bottom left, and 'Give Your Feedback' with a three-dot menu is in the bottom right.

7. Now you can enter an email subject and message that all recipients of the document will receive. The email subject is populated from the original email. Add this information, and then click **Go to DocuSign**.
8. The DocuSign sending experience opens in a new browser tab. 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 [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 from where you can resend your documents or track the status of the documents in DocuSign.

9. Done!

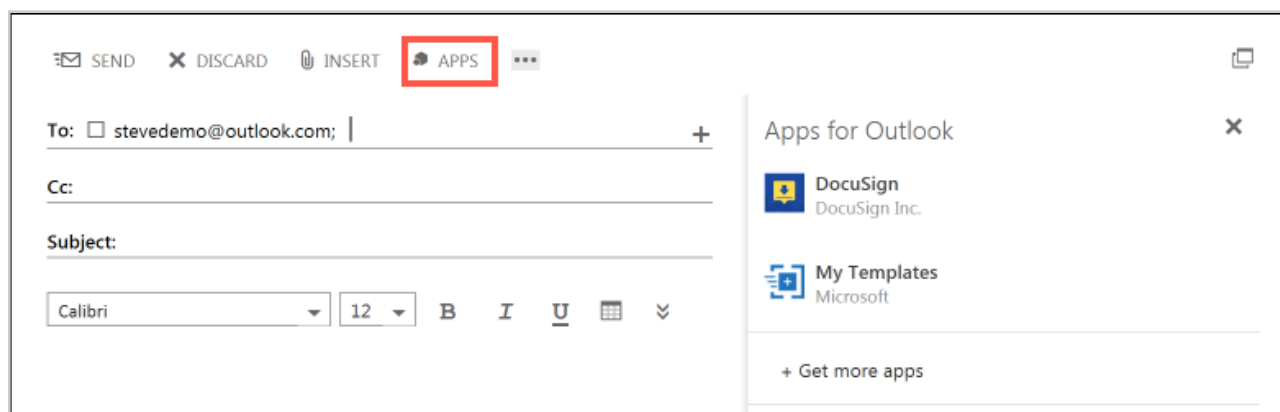
You have successfully sent documents for signature with DocuSign.

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 or 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 to create a new DocuSign account using your Office 365 credentials.

SEND

DISCARD

INSERT

APPS

To:

Cc:

Subject: NDA

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DocuSign

X

< Upload Documents

Upload documents from your computer to send to others to sign or use a template from your DocuSign account

UPLOAD DOCUMENTS

OR

CHOOSE TEMPLATE

DocuSign®
For Outlook

SEND

DISCARD

INSERT

APPS

To:
stevedemo@outlook.com

Cc:

Subject:

Calibri | 12 | B I U | [List Bulleted] [List Numbered] [List Task] [Text Color] [Background Color] [Link] [Table] [More]

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DocuSign

< Choose Template

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Recently Used Templates

Sales Agreement

Partner Agreement

Standard NDA Template

Test Template

Direct Deposit Form

CONTINUE

DocuSign
For Outlook

6. You are prompted to specify signers for the attachment. 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, and 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 predefined display as read-only and cannot be changed.

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

The screenshot shows an Outlook email composition window with the 'To' field populated with 'stevedemo@outlook.com'. Overlaid on the right is the 'DocuSign Add Signers' dialog box. The dialog has a title bar with a back arrow, 'DocuSign', and a close button. Below the title bar is a list of signers with one entry: '1 Steve Demo' with a delete icon. Underneath is a form with three fields: 'Name' (containing 'Steve Demo'), 'Email Address' (empty), and a dropdown menu set to 'Needs to sign'. At the bottom of the form are two buttons: 'ADD SIGNER' and 'ADD ME'. Below these is a large blue 'CONTINUE' button. At the very bottom of the dialog is the 'DocuSign For Outlook' logo and a three-dot menu icon.

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

Add this information, and then click **Continue**.

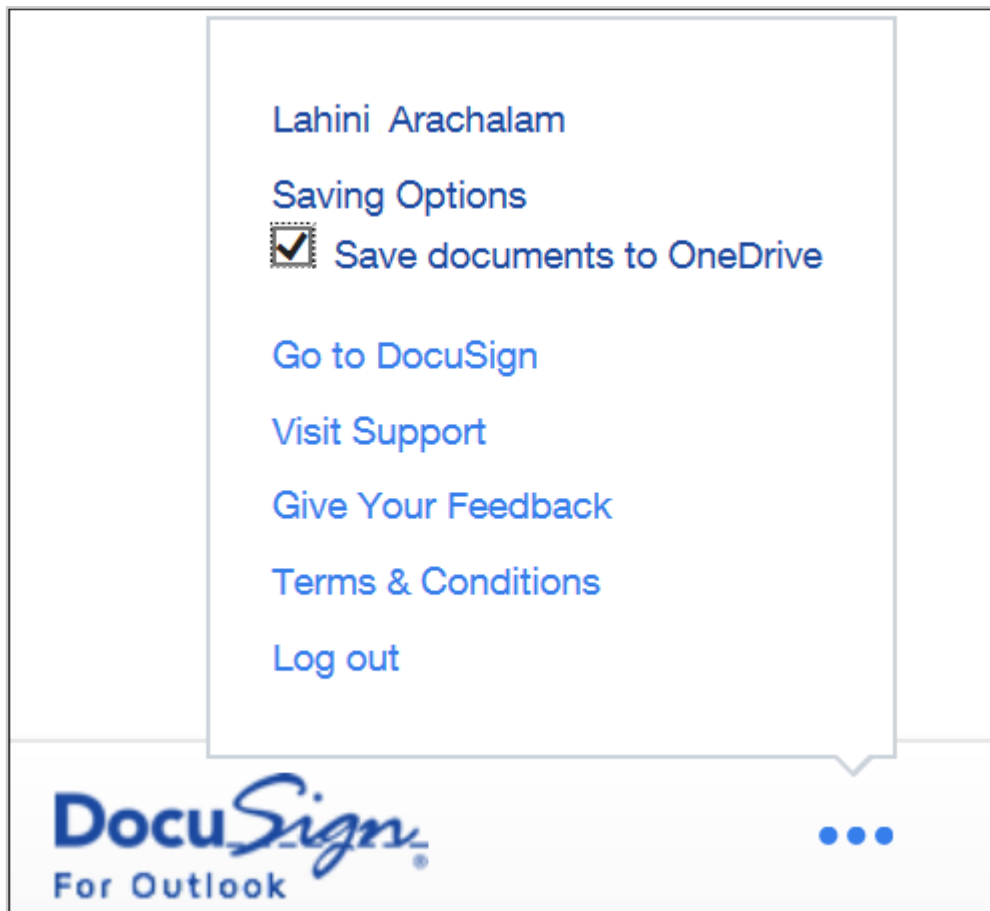
The screenshot shows the Outlook interface with a DocuSign add-in pane open on the right. The add-in pane is titled 'DocuSign' and contains a section 'Add a message'. Below this title, it says 'Write a message for All Recipients'. There are two input fields: 'Subject' with the placeholder 'Enter subject' and 'Message' with the placeholder 'Enter recipient message'. Below these fields is a blue button labeled 'GO TO DOCUSIGN'. At the bottom of the pane is the DocuSign logo and the text 'For Outlook'.

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**.

The screenshot shows the Outlook interface with the DocuSign add-in pane open. The pane is titled 'DocuSign' and contains a section 'You're ready to send!'. Below this title, there is a grey button labeled 'PREVIEW DOCUMENT'. Below that, it says 'I'm ready to send my document'. At the bottom of this section is a blue button labeled 'SEND DOCUMENT'. At the bottom of the pane is the DocuSign logo and the text 'For Outlook'.

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 corner and updating the **Save documents to OneDrive** option.



8. If you chose **Go to DocuSign** or **Preview Document**, the DocuSign sending experience opens in a new browser tab. 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 [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 from where you can resend your documents or track the status of the documents in DocuSign.

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

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9. Done!

You have successfully sent documents 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, 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?

- DocuSign is a secure and legal service, so we verify your identity before allowing you to sign a document in Office 365. Then, all of your signed documents are automatically stored back to 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 pop-up 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?

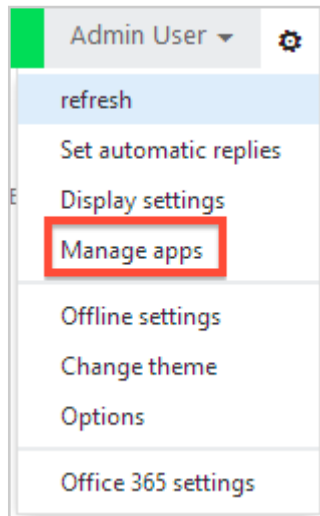
- Within DocuSign for Outlook, navigate to the menu in the upper left corner. Select **Go to DocuSign**. The DocuSign home page appears. Click **Preferences** and **Manage Identity** to adopt a new signature.

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

- If you do not see the **Choose Template** option in the new mail or 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 corner and select **Manage apps**.



Select **DocuSign for Outlook**, and then click the **Disable** link on the right side. After 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.

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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 corner. Select **Send Feedback**. This generates 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!