DocuSign Instructions

1. Start here: <https://app.docusign.com/home>
   1. Username will be your Granite email address
   2. For password assistance either use “Forgot Password” or speak with Melissa
2. Once logged on click the yellow “Start” button
3. From the drop-down select “Send an Envelope”
4. You will be taken to a new page and given the opportunity to “Upload” (it’s the blue button)
5. Once you’ve clicked “Upload” it will open up your documents so you can select the document you need a signature on
6. Next, we will need to designate who needs to sign the document by entering their name and email address under “Add Recipients to the Envelope”
   1. You can designate that this person either “Needs to Sign” or click that button to instead select “CC/Receives a Copy” if you just want to keep others in the loop on status of document
7. Moving down the page your next step is to draft a message that will be included with the email DocuSign sends out to the signor, there’s a place to designate the subject line and include a brief message
8. At the bottom right corner select the yellow “Next” button
9. The next step will be to designate what type of text needs to be where on the document
   1. Click and drag from the left hand navigation bar the type of text you want and release it over the document where you want that specific text
   2. For example, click and drag “Date Signed” and drop it over the empty line where a signed doc would have the date
   3. For required fields make sure that the right hand navigation menu has “Required Field” checked, for fields that they may need to use or not, make sure that that box is unchecked so that the signor can continue without putting anything in if it doesn’t apply to them
10. Once you’ve completed all of the fields you want on the form use the yellow box in the bottom right corner to “Send”