Welcome to the New DocuSign Experience!

Sending an Envelope

If you are reading this then you have begun your transition from the Classic DocuSign application to the New DocuSign Experience. We believe you will find the New DocuSign Experience to be a refreshing and more efficient way of sending and managing your documents.

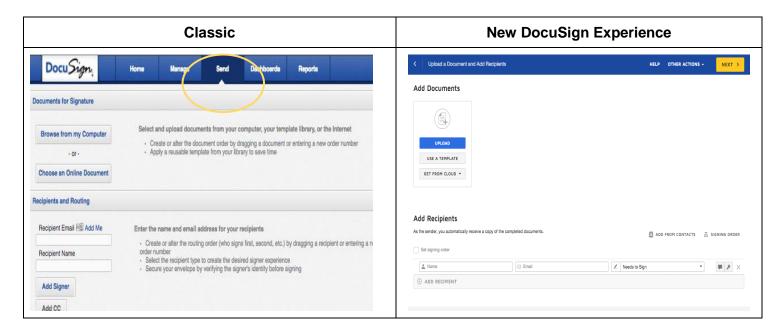
Why did we do this?

The product team at DocuSign took years of digital transaction workflow knowledge and combined it with stateof-the-art user design to create a new front end experience that is both intuitively easier to use and functionally more powerful. By building it on new technologies, we can now add features and fix issues much faster than we could with Classic.

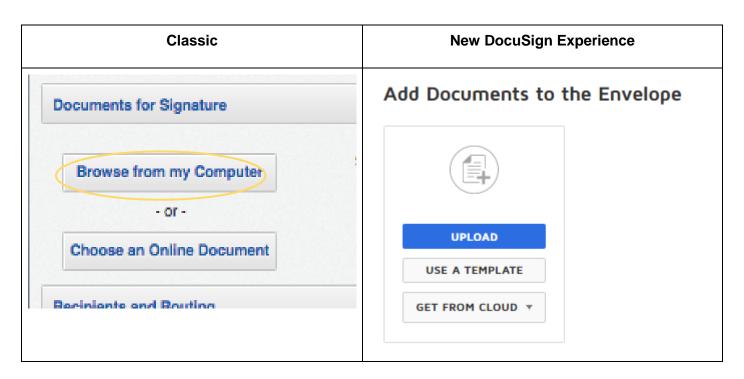
Note: We recommend you take time to read the transition documents and watch the videos as this will make your transition quicker and smoother.

Sending an Envelope – Common Workflow Changes

Here's a comparison between Classic and New DocuSign for sending an envelope.



The Classic Send page no longer exists - When you choose to send an envelope in the New DocuSign Experience, a new view is displayed, called the Prepare page.



Browse button is now Upload.

Classic	New DocuSign Experience	
Documents for Signature Add = Document X Browse from my Computer Add from your DocuSign Library -20 Wp.Templates	Add Documents to the Envelope	
Choose n Online Document Add an online document Pecipients and Routing Pecipient Email IIII: Add Me Pecipient Name Pecipient Name Pecipient Name Pecipient Name Pecipient Part Name Pecipient Name Pecipient Name Pecipient Name Pecipient Name		
Add CC Add Cancel	UPLOAD	
Email Message	USE A TEMPLATE	
	GET FROM CLOUD V	

Included with the Upload button are options to Use a Template and Get from Cloud.

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Signing Order - To set signing order in New DocuSign Experience, select the Set Signing Order checkbox.

Classic	New DocuSign Experience	
Reminders and Expirations Envelope will expire on 12/2/2016. Signer will not be sent any reminders. Reminders Enabled Send a reminder email to the signer in 0 day(s). After the first reminder, send a reminder every 0 day(s). Expire envelope in 120 day(s). Warn signer of envelope expiration 0 day(s) before it will expire. Next Send Now Save Draft Discard Changes	HELP OTHER ACTIONS - NEXT >	

Send Now has moved - It is now under "Other Actions" at the top of the app

Classic		New DocuSign Experience		
Recipients and Routing Recipient Email Add Me Create or alter the select the recipient Name Select the recipient Name Recipient Name Recipient Nam		Set signing order		
Add Signer Ad	d CC	peter testdemo99999 : petertestdemo99999@mailinator.com		
Add Bulk Recipient		Messane to All Recipients	Advanced Ontions L FdB	

There is no Add Me button - If you just click in the blank recipient line, your name and email will display. Press Down arrow and hit return or just select it and it will populate the recipient line with your name and email.

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C	Classic	New DocuSign Experience	
То	(name missle	↑ ♪ □ □ 192%	
Message	Please Docus	Stanriard Fields -	
Tag for:	*	Signature DS Initial	
(name missir	¢ 0 (gr	Date Signed	
Standard Signature	Custom	Le Name	

Tags in Classic are now called Fields in New DocuSign Experience.

Classic		New DocuSign Experience				
To	-	099999 [petertestdemo99999@mailinator.com]; peter testdemot gn this document: i-9.pdf	Please DocuSign: 1Way-N	DA_ter	mplate.doc	: SEND
Taα for: ✓ peter testue	mo99999 [pet mo99999a [pe wre	ertestdemo99999@mailinator.com] tertestdemo99999@mailinator.com] Instructions for Employme Department of Ho U.S. Citizenship and I Read all instructions carefully Anti-Discrimination Notice. It is illegal to discriminate again recruitment or referral for a fee, or in the employment eligibili that individual's citizenship status, immigration status or natio document(s) they will accept from an employee. The refusal to has a future expiration date may also constitute illegal discrimine (Constitute Internet Inter	Abby Angle Abby Angle Abby Angle Bettina Garmond Greg Rich Edit Recipients Date Signed Name Email Company	•	<section-header><form><form><form></form></form></form></section-header>	Documents

Selecting the fields for a recipient is now at the top left and different recipients have different colored fields.

Classic		New DocuSign Experience		
Date Signed Approve Decline Data Field Check Box Radio Button Drop Down Note Formula		Validation None Custom Date Email Letters None Numbers SSN ZIP ZIP ZIP+4		

The Data tag is replaced by the Text field. The Text field includes a validation property to achieve the data masking for text, numbers, email, etc.

Classic	New DocuSign Experience
Classic	Form 1-9 OMB No. 1615-0047 Expires 03/31/2016 Completion of this form. OT specify which ted has a future
	bof Form I-9 no later Data Label Y any) Tooltip Zip Code AutoPlace hone Number Image: Comparison of the second seco
	ite "N/A" in this field. <i>tion Number:</i> 3-D Barcode ot Write in This Space

Field Properties has moved - In Classic selecting the gear icon on a tag displayed the field properties for that tag. When you select the field in New DocuSign Experience, a properties panel displays on the right.

Classic	New DocuSign Experience
xpiration date may also constitute illegal discrimination. Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of han the first day of employment, but not before accepting a job offer.) aet Name (Even Name) Middle Initial Other Names Used (if i	document(s) they will accept from an employee. The refusal to the an individual because the documentation presented has a expiration date may also constitute lilegal discrimination. Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of Form I than the first day of employment, but not before accepting a job offer.)
Last Name First Name Full Name This is a shorter sentence Act Number Sentence and should wrap. Date of Birth (mm/dd/yyyy) U.S. Social Security Number E-mail Address Should wrap. Tekptx arm aware that federal law provides for imprisonment and/or fines for false statements or use of false doc nonection with the completion of this form. attest, under penalty of perjury, that I am (check one of the following): A clitzen of the United States A noncitizen national of the United States (See instructions) A lawful permanent resident (Alien Registration Number/USCIS Number Inter 1 is a data field. An alien authorized to work, provide your Alien Registration Number/USCIS Number OR Form I-94 Admissic 1. Alien Registration Number/USCIS N	Last Name (Family Name) First Name (Given Name) Midde Initial Other Names Used (if any) Last Name First Name First Name Full Name Image: This is a shorter sentence Act Number This is has a longer sentence Zip Co Date of Birth (mm/ddyyyy) U.S. Social Security Number E-mail Address Tsiephone Num Last and rederal law provides for imprisonment and/or fines for false statements or use of false document: connection with the completion of this form. Tsiephone Num Lattest, under penalty of perjury, that I am (check one of the following): A citizen of the United States A noncitizen national of the United States (See instructions) A lawful permanent resident (Alien Registration Number/USCIS Number). Some aliens may write "NIA" in (See instructions) For aliens authorized to work, provide your Alien Registration Number/USCIS Number OR Form I-94 Admission Num 3-D Ba Laien Registration Number/USCIS Number Some aliens may write "NIA" in (See instructions) Some aliens audorized to work, provide your Alien Registration Number/USCIS Number OR Form I-94 Admission Num I. Alien Registration Number/USCIS Number Some aliens audorized to work provide your Alien Registration Number/USCIS Number OR Form I-94 Admission Num I. Alien Registration Number/USCIS Number So Da Ba Do Nort Write i Some aliens addod wrap.

Template fields conversions – There are still some situations where templates created in Classic will not convert exactly in the New DocuSign Experience. Some of the fields may resize differently or not be in the same position. We recommend that you modify the fields to the correct size and position in the New DocuSign Experience.

Sending an Envelope – Advanced Workflow Changes

Classic	New DocuSign Experience		
r Email Name Action Kichtify 1 petertestdemo99999@mailinator. = peter testdemo99999 1 petertestdemo99999@mailinator. = peter testdemo99999 Sign in person Receive a copy	As the sender, you automatically receive a copy of the completed documents.		
, Order Diagram	Message to All Recipients Advanced Options Edit Please DocuSign: • Recipients can sign on paper • Incomplete documents expire 120 days after send date • Recipients are warred 0 daylej before request expires		

There are several recipient action terms that have changed.

- Intermediary or Manage Recipients is now called Update Recipients
- Agent or Address Recipients is now Specify Recipients
- Acknowledge Receipt is now Needs to View
- Editor or Manage Envelope is now Allow to Edit

Classic	New DocuSign Experience	
Action Identify amo99999 Sign + Email + amo99999 Sign + Email + Email +	ADD FROM CONTACTS Add Authentication Needs to Sign	

The Identity dropdown is now called Add Authentication and some other terms have changed.

• Identity Check is now Knowledge Based

	Signature of Preparer or Translator:		
	Last Name (Family Name)	<u>ち</u> ご つ つ 91% マ	Actions - Send Preview
Send Preview	Address (Street Number and Name)	Note: Form 4506-T begins on the next page.	SAVE AND CLOSE DISCARD
		Kansas City and Austin Fax Numbers for Filing Form 4506-T Have Changed The fax numbers for filing Form 4506-T with the IRS center in Kansas City and Austin have changed. <u>Kansas City</u> : The new fax number is 855-821-0094. The previous fax number of 815-822-6102 is no longer in service.	Edit Message Edit Recipients Edit Documents Advanced Options

Preview has moved to the Actions menu – From the tagger, selection Actions > Preview.

Clas	ssic	N	lew DocuSign	Experience	
Recipient Email E Add Me GW.west@yahoo.com Recipient Name		Contacts ADD CONTACT REP ALL SHARED	MOVE		
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GW.west@yahoo.com GW.west@yahoo.com	Harry Tate New Name	Docs Mike & Mark	(Signing Group) (Signing Group)	Mark R. Lyon mlyon@mailnesia.com	Properties, Inc. Properties, Inc.
		My Team	(Signing Group)	View All Deschutes	Properties, Inc.

Any Signer is now Signing Groups. Signing groups are controlled by account admins in the Groups administration view.

Classic	New DocuSign Experience
Envelope Settings Recipient Information Allow recipient(s) to sign on paper. Allow recipient(s) to edit the document(s). Allow recipient(s) to change signing responsibility. Turn on auto navigation. Must be a signer to view signed documents. Reminders and Expirations Envelope will expire on 11/2/2016. Signer will not be sent any reminders. Reminders Enabled	New DocuSign Experience Envelope Custom Fields * Declined Reason Cuarterly Reports Invalid Text 1
Send a reminder email to the signer in 2 day(s). After the first reminder, send a reminder every 2 day(s). Expire envelope in 90 day(s). Warn signer of envelope expiration 10 day(s) before it will expire. Sender Settings Custom Field(s) EnvelopeType	

Custom Fields are now Envelope Custom Fields.

Classic	New DocuSign Experience		
	HELP OTHER ACTIONS - SEND >		
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Signature Tag Properties	🗊 🔒 Note		
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e) From left: 273 From top: 1129	No. 1615-0047 es 03/31/2016		
and Name) Anchor Text	Add Text		
Formatting Properties Conditional Fields	Add Text		
	based on		
Apply Cancel Delete Save as Custom	Formatung		
	presented Data Label ~		
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Anchor Text is now AutoPlace.

Classic	New DocuSign Experience		
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an offeit N Page J of Y 3 of P	m. Edit Documents dividual in hiring, discharge, ind E-Verify) process based on Advanced Options		
Among a copycol, original documentation is acceptable. The only excerption is that an employee may present a 4 a brief confidence. Additionally, in some instance, a document that appeares to be explored and the experiment and above on the local of the document that appeares to be explored and the explored and the local of the document appeares to be explored and the explored and the local of the document appeares to be explored and and the explored and the local of the document appeares to be explored and and the explored and the local of the explored and the document appeares the explored and and the explored and the explored and the explored and the document appeares the explored and and the explored and the explored and the explored and the explored and the explored and and the explored and the explored and and the explored and th	NNOT specify which		

Use Other Actions - Selecting the dropdown at the top called Other Actions will give you options to add, remove and reorder documents and recipients as well as change the message.

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Allow All to Edit (Field Markup) is now Collaborative fields.

Classic	New DocuSign Experience
 ► Location ▼Formatting Properties Characters per line: 5 Lines 1 Fixed Width Maximum number of characters (Lucida Console) ‡ (9) ‡ (Black) ‡ B / U ✓ Required Locked ✓ Conditional Fielde 	T Dext Recipient Peter Test1 Peter Test1 Peequired Field Read Only Add Text Add Text Character Limit
	Formatting ~
	Data Label 🗸
	Tooltip ~
	Validation ~

Locked fields are now Read Only fields.