

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.

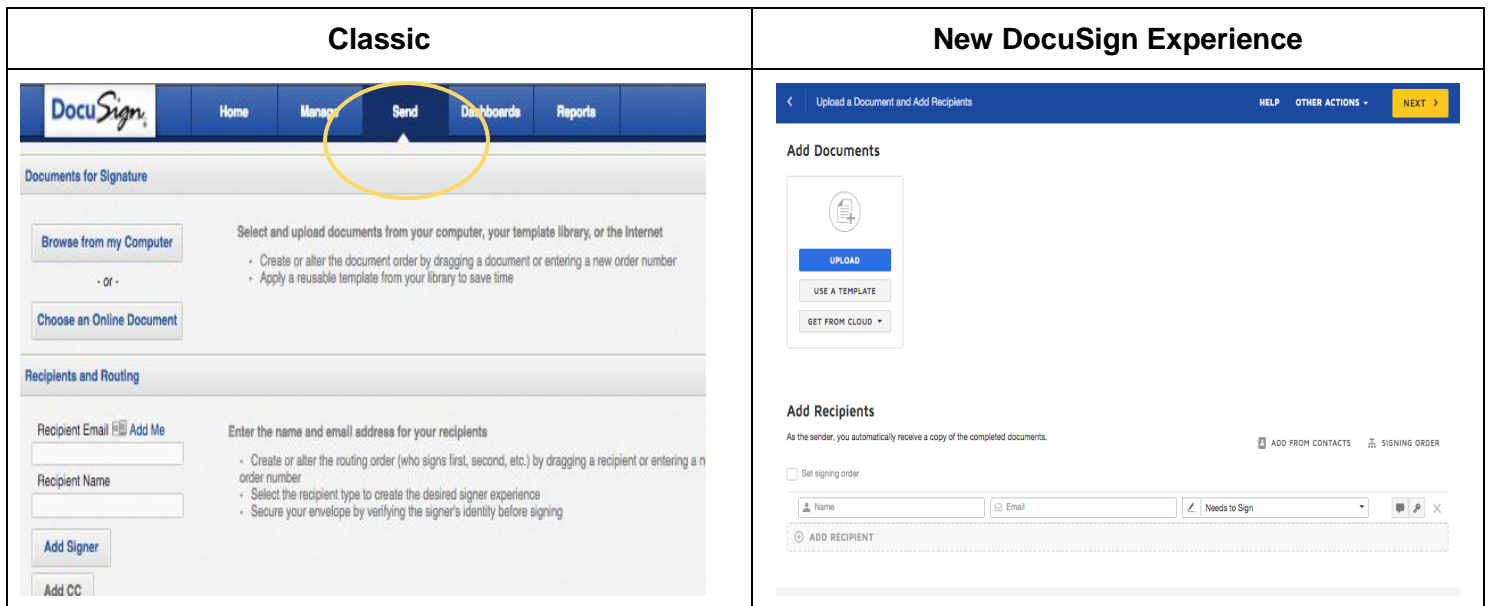
Why did we do this?

The product team at DocuSign took years of digital transaction workflow knowledge and combined it with state-of-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.

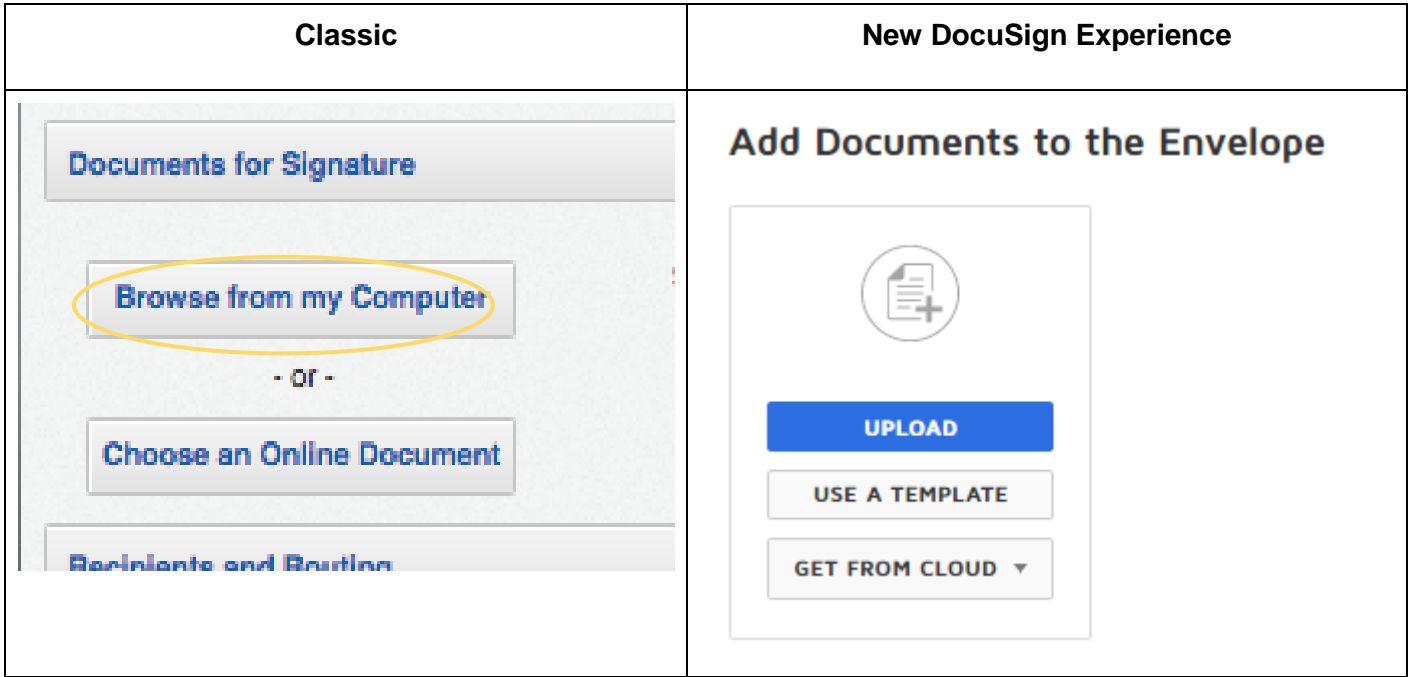
Note: We recommend you take time to read the transition documents and watch the videos as this will make your transition quicker and smoother.

Sending an Envelope – Common Workflow Changes

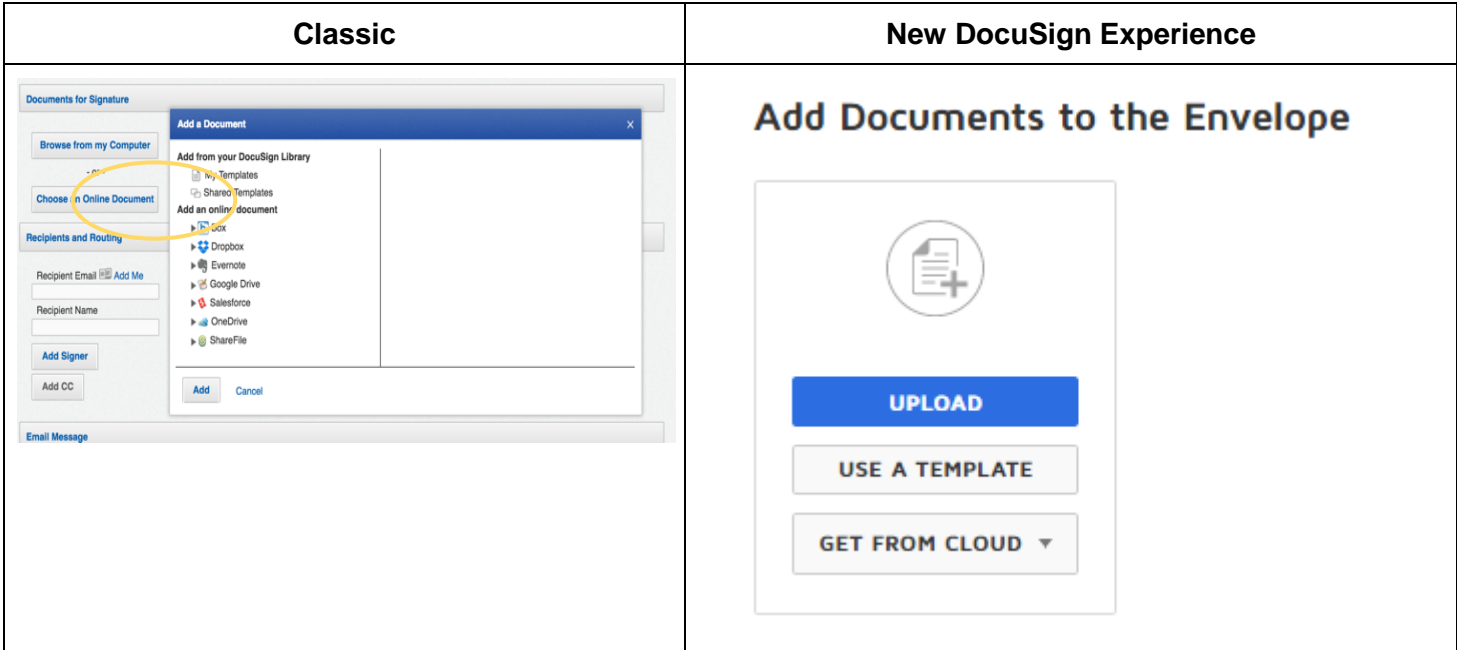
Here's a comparison between Classic and New DocuSign for sending an envelope.



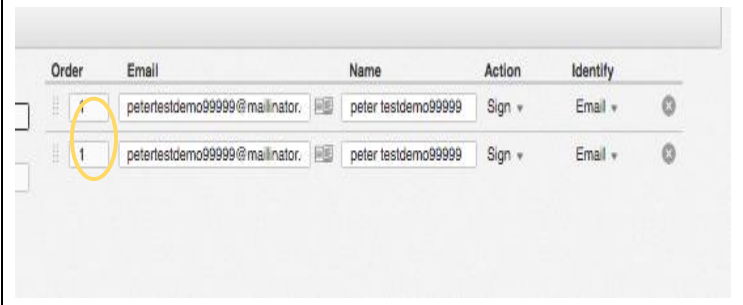
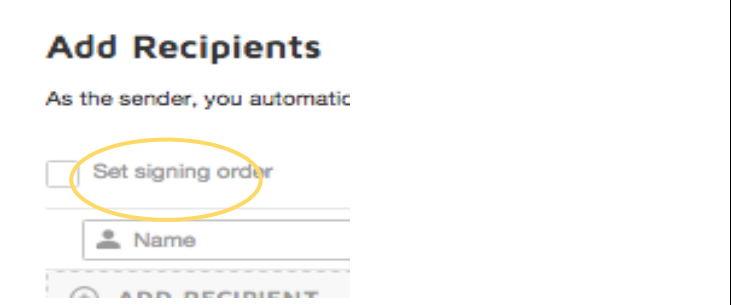
The Classic Send page no longer exists - When you choose to send an envelope in the New DocuSign Experience, a new view is displayed, called the Prepare page.



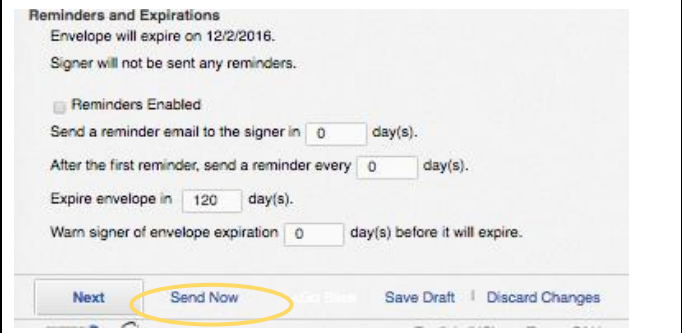
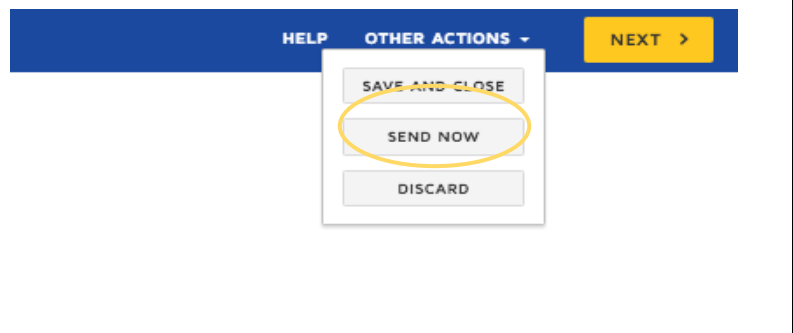
Browse button is now Upload.




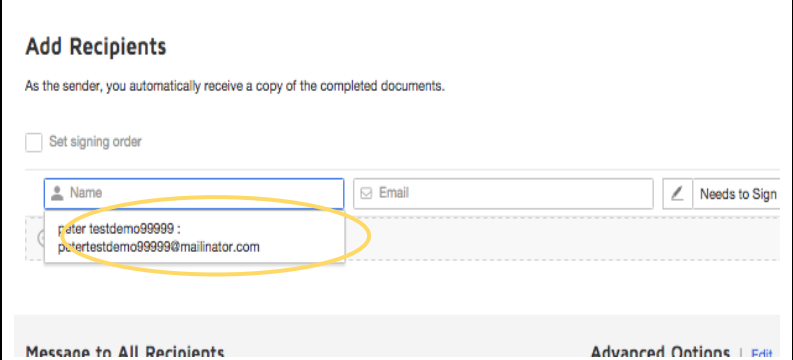
Included with the Upload button are options to Use a Template and Get from Cloud.

Classic	New DocuSign Experience
	

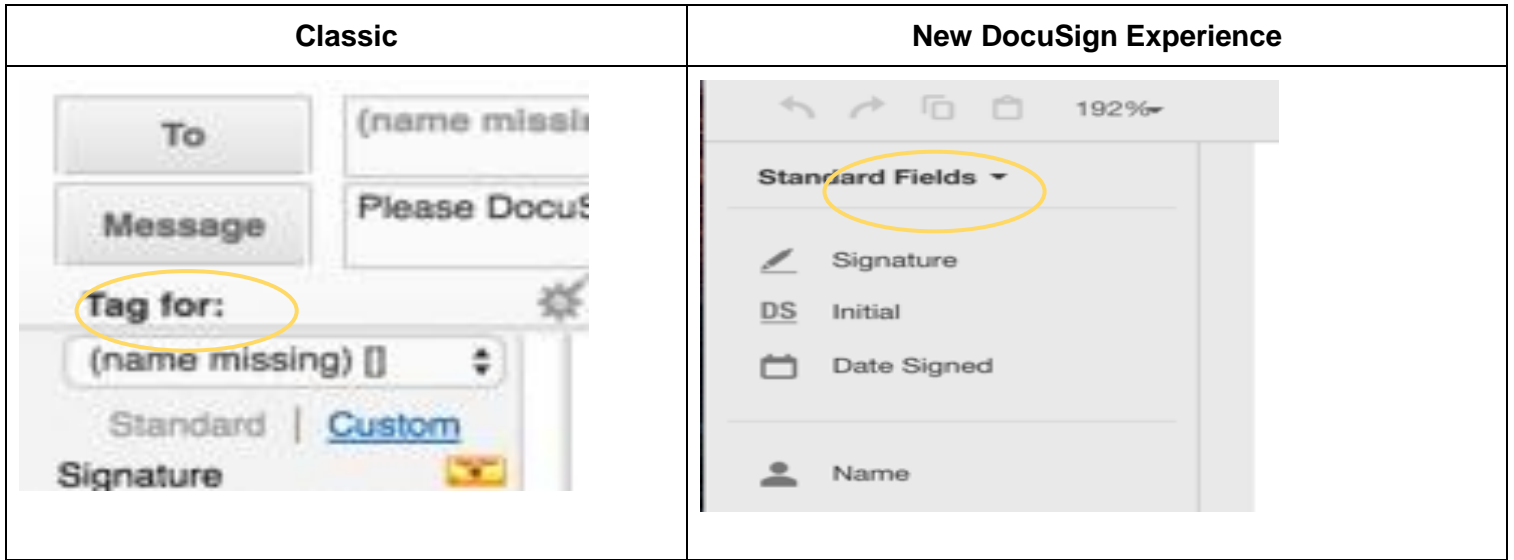
Signing Order - To set [signing order](#) in New DocuSign Experience, select the [Set Signing Order](#) checkbox.

Classic	New DocuSign Experience
	

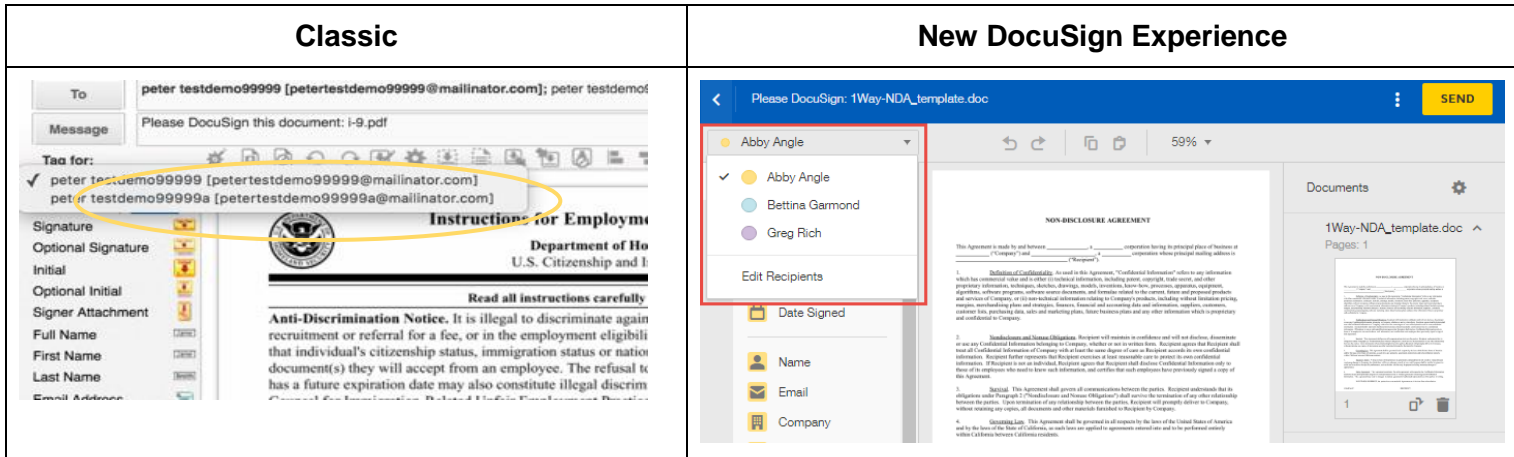
Send Now has moved - It is now under “Other Actions” at the top of the app

Classic	New DocuSign Experience
	

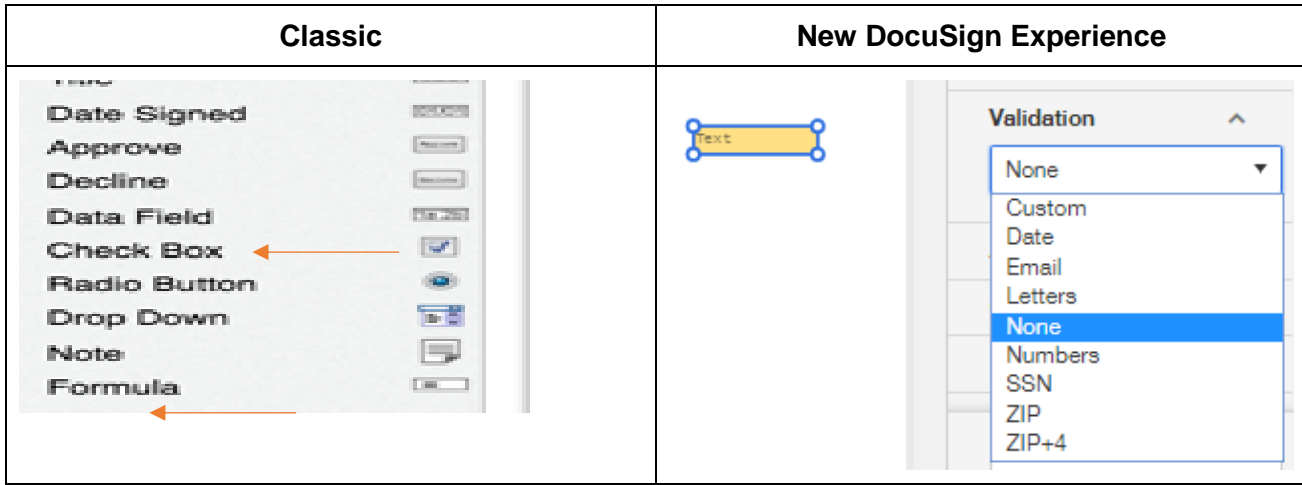
There is no Add Me button - If you just [click in the blank recipient line](#), your name and email will display. Press Down arrow and hit return or just select it and it will populate the recipient line with your name and email.



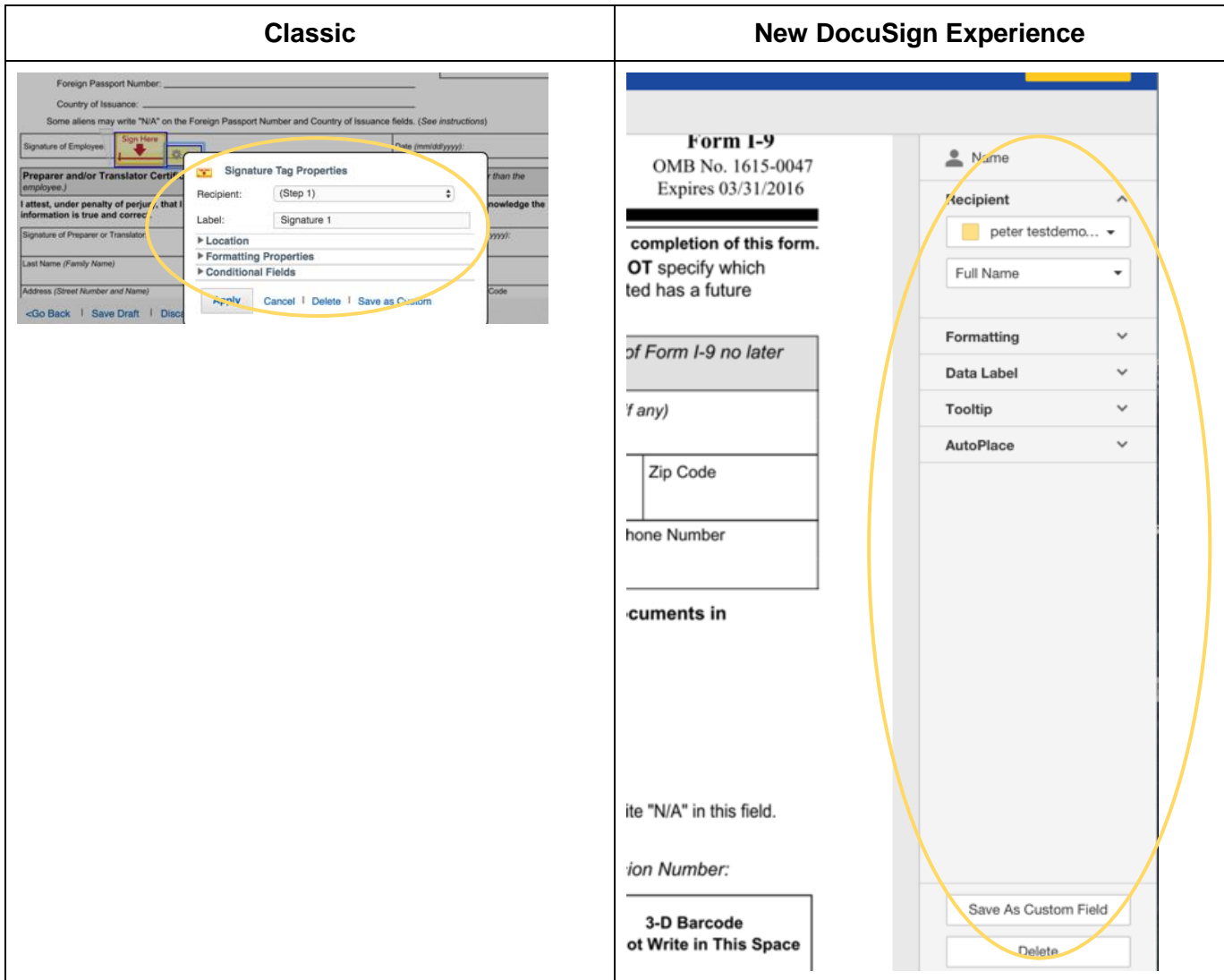
Tags in Classic are now called **Fields** in New DocuSign Experience.



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



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.



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

expiration date may also constitute illegal discrimination.

Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of Form I-9 *no later than the first day of employment, but not before accepting a job offer.*)

Last Name (Family Name) Last Name	First Name (Given Name) First Name	Middle Initial	Other Names Used (if any) Full Name
--------------------------------------	---------------------------------------	----------------	--

Address (Street Number and Name)
This is a shorter sentence

Apt. Number
This has a longer sentence and should wrap.

State

Date of Birth (mm/dd/yyyy)

U.S. Social Security Number

E-mail Address

Telephone Number

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, 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) This is a data field.

An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy) _____ . Some aliens may write "N/A" in (See instructions)

For aliens authorized to work, provide your Alien Registration Number/USCIS Number **OR** Form I-94 Admission Number:

1. Alien Registration Number/USCIS Number: _____

OR This is a data field that is longer and should wrap.

2. Form I-94 Admission Number: _____

Do Not

If you obtained your admission number from CBP in connection with your arrival in the United States, you must provide the number.

New DocuSign Experience

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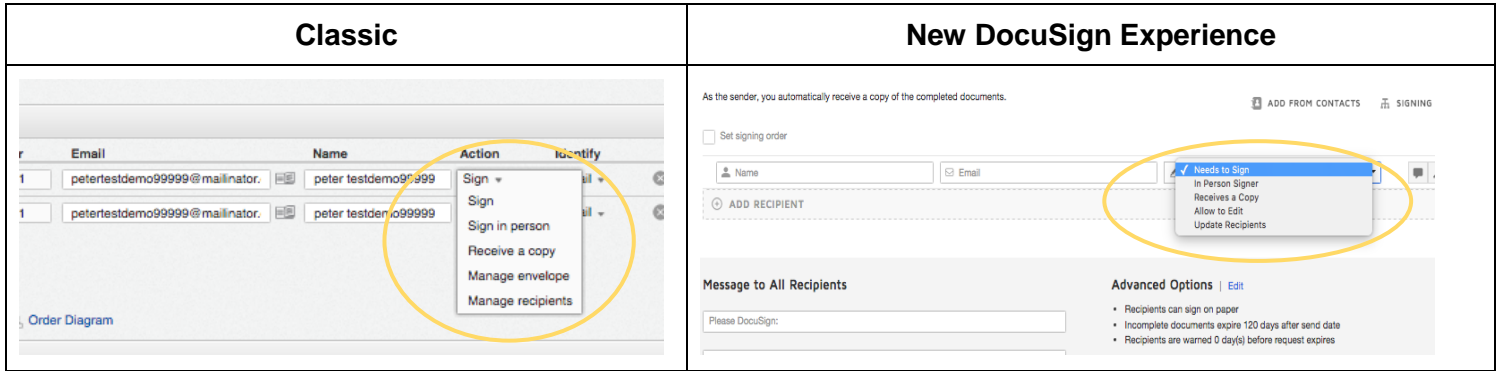
OR This is a data field that is longer and should wrap.

2. Form I-94 Admission Number: _____

3-D Bar
Do Not Write In

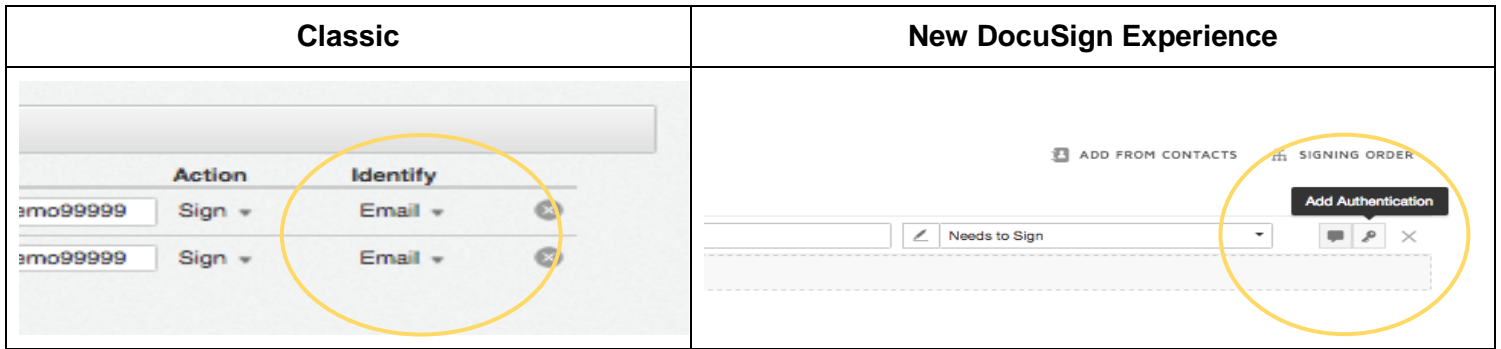
Template fields conversions – There are still some situations where templates created in Classic will not convert exactly in the New DocuSign Experience. Some of the fields may resize differently or not be in the same position. We recommend that you modify the fields to the correct size and position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

Sending an Envelope – Advanced Workflow Changes



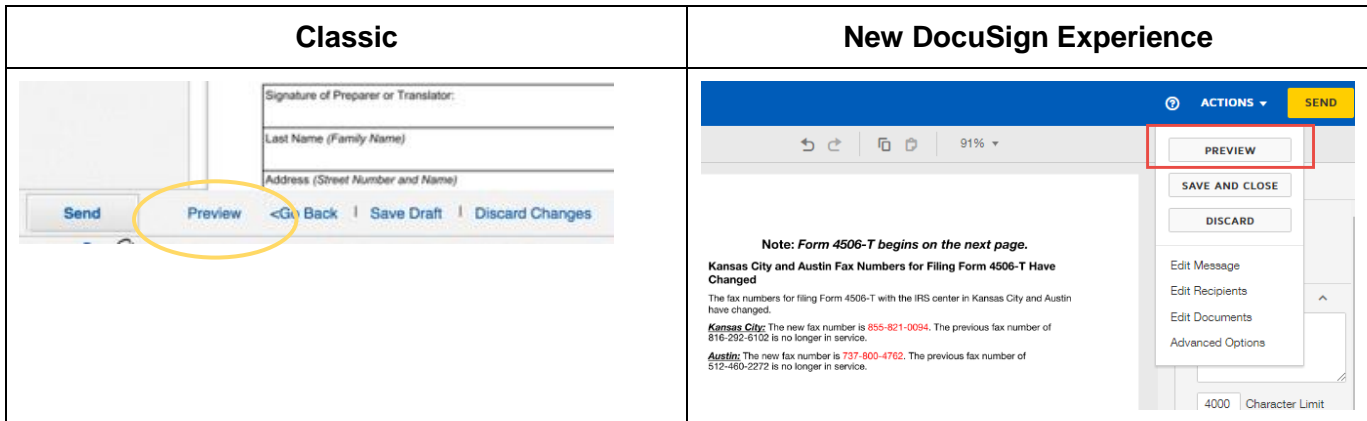
There are several recipient action terms that have changed.

- 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**



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

- Identity Check is now **Knowledge Based**



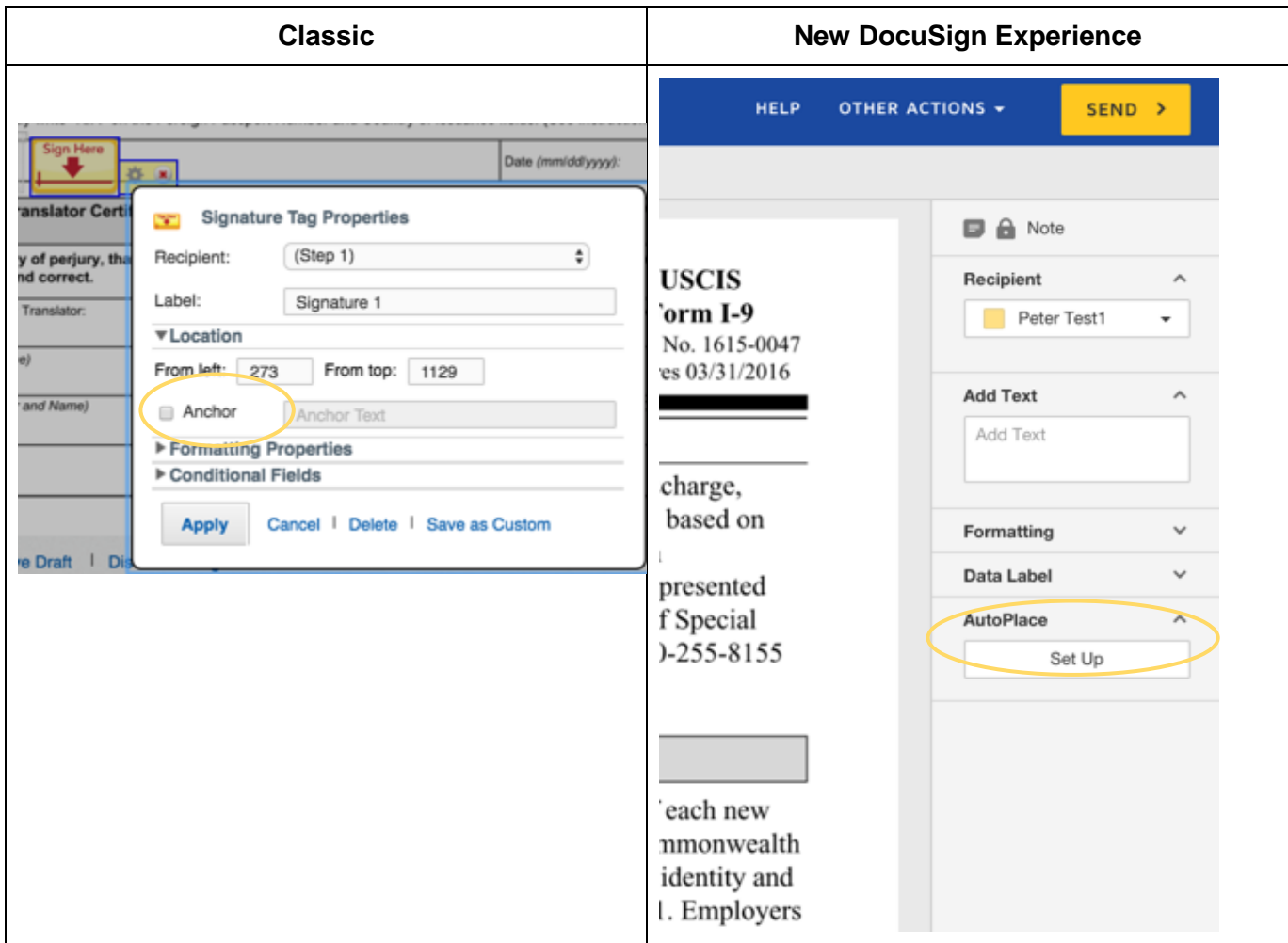
Preview has moved to the Actions menu – From the tagger, selection Actions > Preview.

Classic	New DocuSign Experience												
<p>Recipient Email Add Me</p> <p>GW.west@yahoo.com</p> <p>Recipient Name</p> <p>GW.west@yahoo.com Any Signer</p> <p>GW.west@yahoo.com Chuck Wagon</p> <p>GW.west@yahoo.com Dave Dollar</p> <p>GW.west@yahoo.com Harry Tate</p> <p>GW.west@yahoo.com -- New Name --</p>	<p>Contacts</p> <p>ADD CONTACT REMOVE</p> <p>ALL SHARED</p> <p>Q signing group</p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Name ^</th> <th>Email</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Docs</td> <td>(Signing Group)</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Mike & Mark</td> <td>(Signing Group)</td> </tr> <tr> <td><input type="checkbox"/></td> <td>My Team</td> <td>(Signing Group)</td> </tr> </tbody> </table> <p>DOCS (3)</p> <p>Guy Swanson swanson@mailnesia.com Properties, Inc.</p> <p>Mark R. Lyon mlyon@mailnesia.com Properties, Inc.</p> <p>View All</p> <p>Deschutes Properties, Inc.</p>	<input type="checkbox"/>	Name ^	Email	<input type="checkbox"/>	Docs	(Signing Group)	<input type="checkbox"/>	Mike & Mark	(Signing Group)	<input type="checkbox"/>	My Team	(Signing Group)
<input type="checkbox"/>	Name ^	Email											
<input type="checkbox"/>	Docs	(Signing Group)											
<input type="checkbox"/>	Mike & Mark	(Signing Group)											
<input type="checkbox"/>	My Team	(Signing Group)											

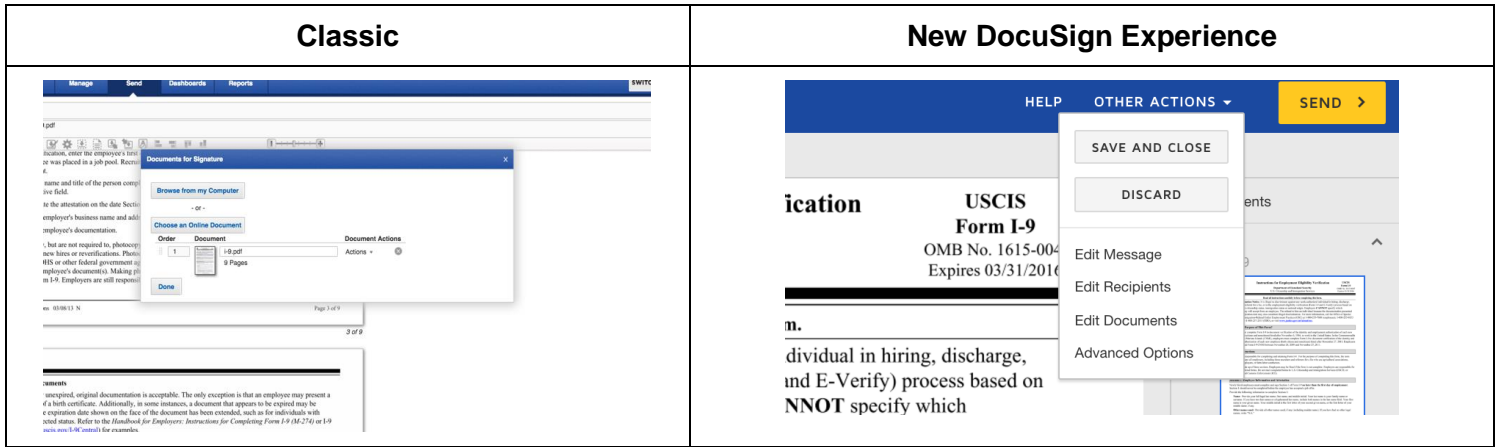
Any Signer is now Signing Groups. Signing groups are controlled by account admins in the Groups administration view.

Classic	New DocuSign Experience
<p>Envelope Settings</p> <p>Recipient Information</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Allow recipient(s) to sign on paper. <input type="checkbox"/> Allow recipient(s) to edit the document(s). <input checked="" type="checkbox"/> Allow recipient(s) to change signing responsibility. <input type="checkbox"/> Turn on auto navigation. <input type="checkbox"/> Must be a signer to view signed documents. <p>Reminders and Expirations</p> <p>Envelope will expire on 11/2/2016. Signer will be warned of expiration on 10/23/2016 Signer will not be sent any reminders.</p> <p><input type="checkbox"/> Reminders Enabled</p> <p>Send a reminder email to the signer in <input type="text" value="2"/> day(s).</p> <p>After the first reminder, send a reminder every <input type="text" value="2"/> day(s).</p> <p>Expire envelope in <input type="text" value="90"/> day(s).</p> <p>Warn signer of envelope expiration <input type="text" value="10"/> day(s) before it will expire.</p> <p>Sender Settings</p> <p>Custom Field(s)</p> <p><input type="text" value="EnvelopeType"/></p>	<p>Envelope Custom Fields</p> <p>* Declined Reason Quarterly Reports Text 1</p> <p>Invalid <input type="text" value="-- Select --"/> <input type="text"/></p>

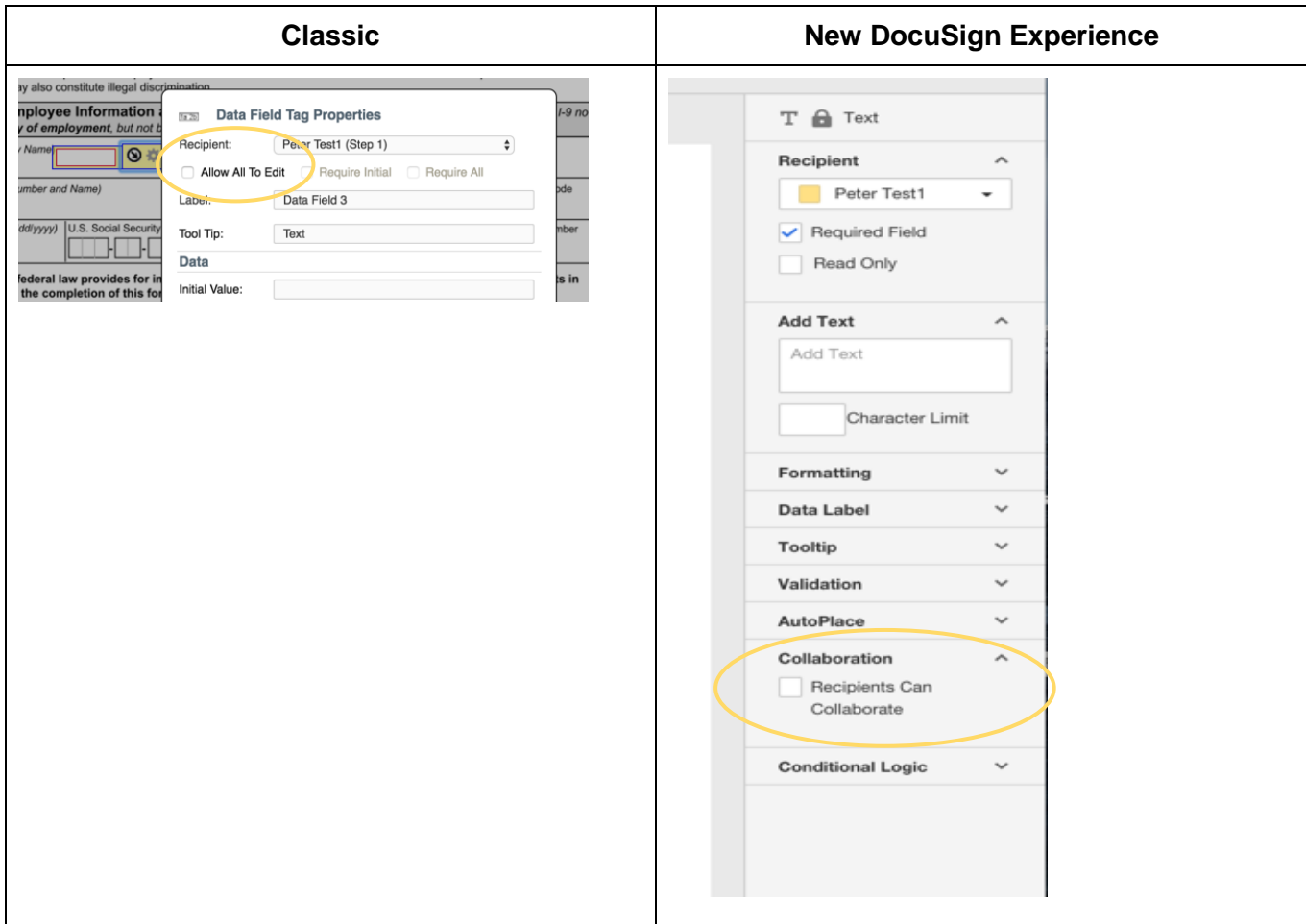
Custom Fields are now Envelope Custom Fields.



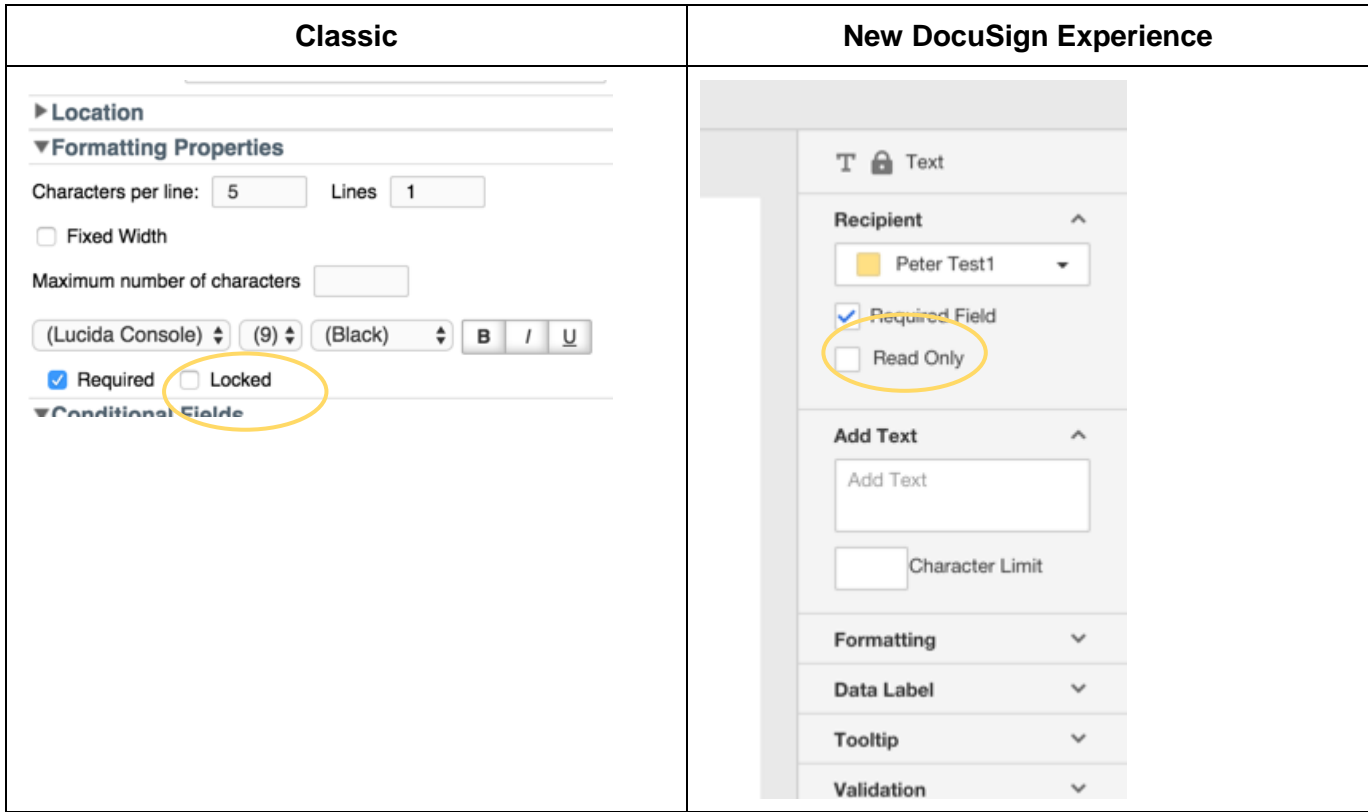
Anchor Text is now AutoPlace.



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.



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



Locked fields are now Read Only fields.