

# Use a DocuSign Template

Follow the steps below for instructions on how to use a template in DocuSign.

The screenshot shows the DocuSign eSignature dashboard. The navigation bar includes 'Home', 'Manage', 'Templates', 'Reports', and 'Settings'. The 'Templates' menu item is highlighted with a red box and a circled '1'. Below the navigation bar, there is a summary section for 'Last 6 Months' with a user profile icon and the text 'DocuSigned by: E72D052CB67E413...'. The summary includes four metrics: 7 Action Required, 0 Waiting for Others, 1 Expiring Soon, and 15 Completed. Below this is a large dashed box containing the text 'Drop documents here to get started' and an orange 'START' button. At the bottom, there is a promotional banner for the 'DocuSign Developer Conference | 24 Sessions + Live Coding Demos of our Award-Winning APIs' scheduled for 'October 26-27' with a 'REGISTER' button.

1. From the DocuSign homepage, select **Templates**.

# Use a DocuSign Template

DocuSign eSignature

Home Manage **Templates** Reports Settings

UJEP JM

NEW ▾

## My Templates

Search My Templates FILTERS

Name	Owner	Created Date	Last Change	
<input type="checkbox"/> ☆ Sign-In Page		9/14/2021 02:23:20 pm	9/17/2021 02:21:07 pm	USE ▾

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2. Locate where the desired template is utilizing the “My Templates” folder, “Shared with Me” folder, or the “All Templates” folder.

# Use a DocuSign Template

**NEW** ▾

1 Selected **MOVE** **MORE** ▾

Name	Owner	Created Date	Last Change
<input checked="" type="checkbox"/> ☆ <b>Sign-In Page</b>		9/14/2021 02:23:20 pm	9/17/2021 02:21:07 pm

**USE** ▾

3. Select the desired template.  
4. Click **USE**.

# Use a DocuSign Template

DocuSign Signature Home Manage Templates Reports Settings

Sign-In Page

Recipients

	Name *	Email *
1	Employee Team	employees@utep.edu

NEEDS TO SIGN CUSTOMIMIZE

Message to All Recipients

Custom email and language for each recipient

To: Employee Team

**SEND** ADVANCED EDIT DISCARD

5. A pop-up window will appear.  
6. Enter the necessary recipient information.  
7. Click **SEND**.

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