CREATE A DOCUSIGN POWERFORM

1. Login to DocuSign via my.AState (Digital Forms) or directly (https://app.docusign.com/home)

2. There are different places to initiate the creation of a PowerForm

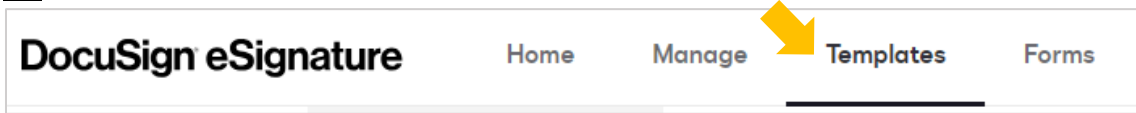   a. On the home page, select "**Start**" then "**Create a PowerForm**"
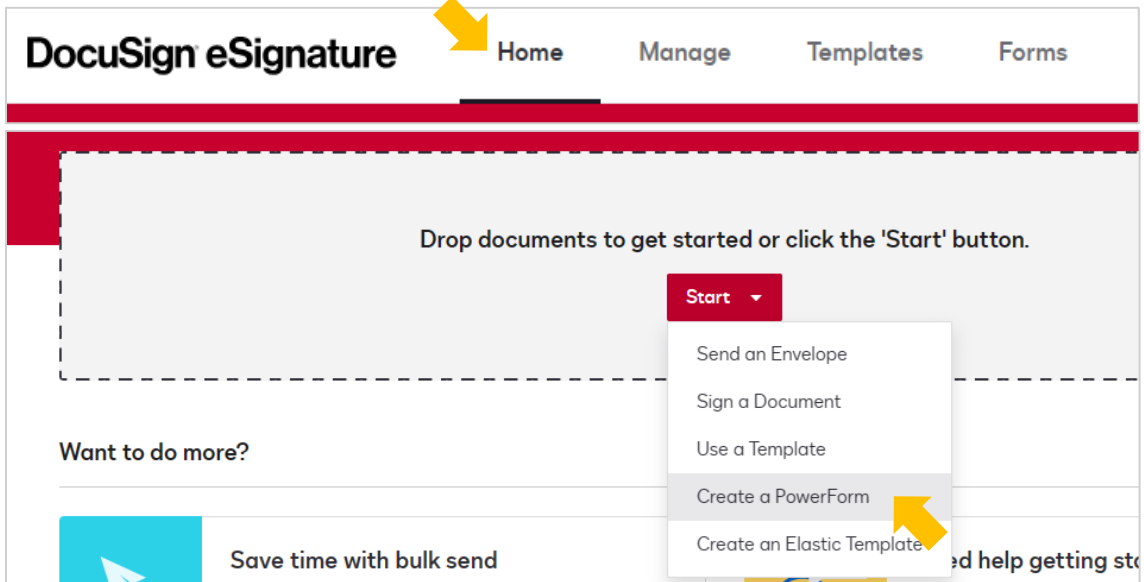
   b. OR go to **Manage** on the top navigation bar, then select "**New**" and "**Create a PowerForm**"
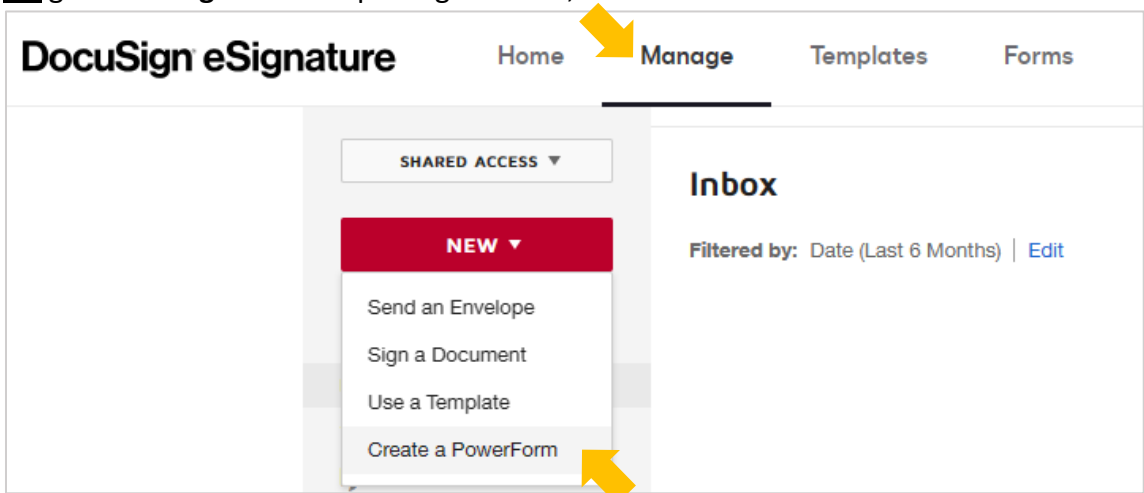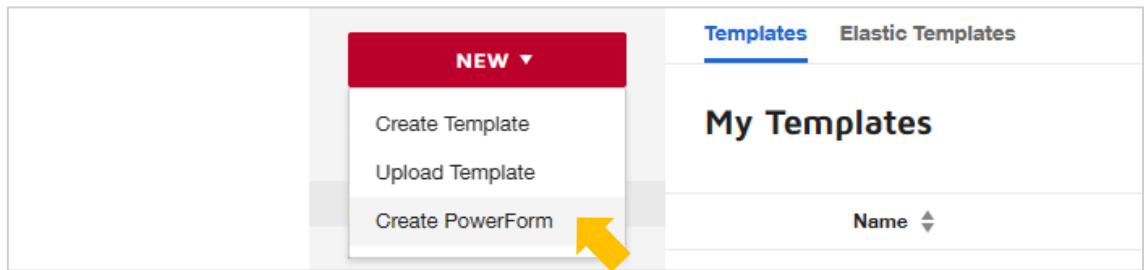
   c. OR go to **Forms** on the top navigation bar, then select "**New**" and "**Create PowerForm**"
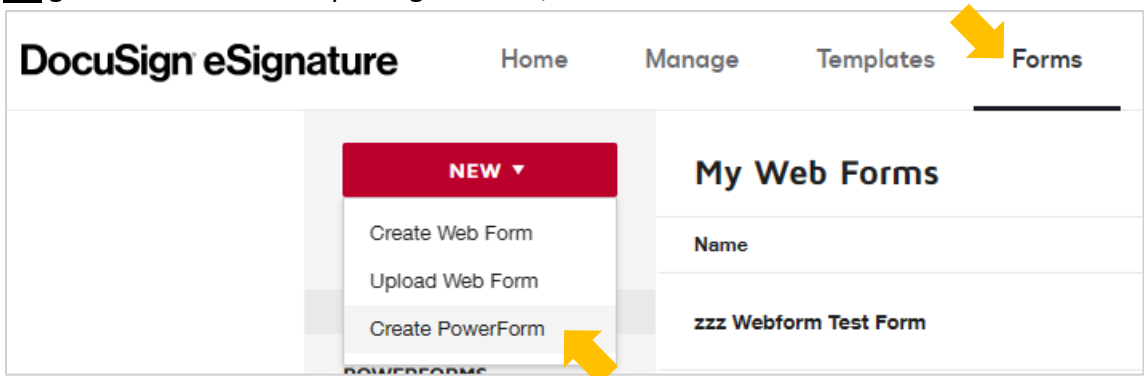
d. <u>OR</u> go to **Templates** on the top navigation bar

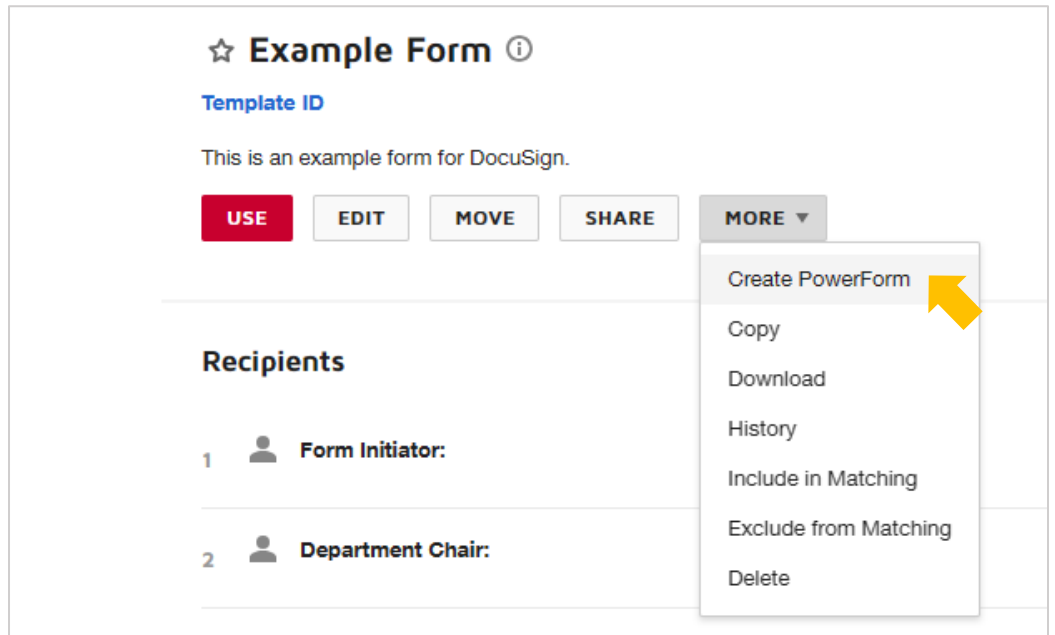i. Select "**New**" and "**Create PowerForm**"

ii. <u>OR</u> select a template title to open the template details
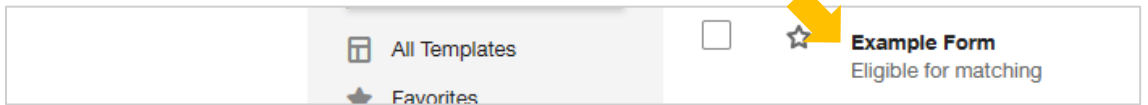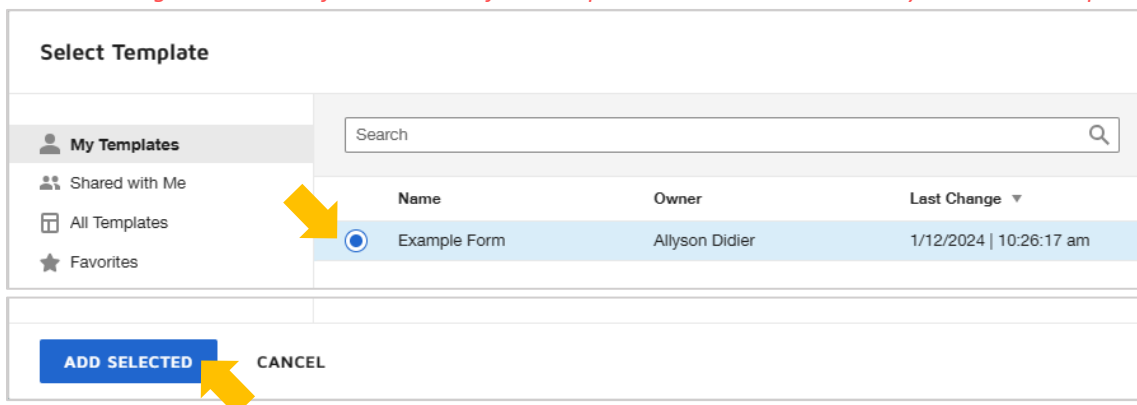

1. On the template details page select "**More**" then "**Create PowerForm**"

3. Select a template for the PowerForm then select "**Add Selected**"

Note: Initiating the creation of a PowerForm from template details will automatically select that template and skip this step.

4. Edit the PowerForm **Name**, **Email Subject**, and **Instructions** (optional)

Create PowerForm

A PowerForm is an envelope initiated from a URL that you make available for signers to complete.

Name *

Example Form

Email Subject *

Complete with DocuSign: Example Form for DocuSign.pdf

Instructions for First Recipient Only

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

Note: It is helpful to add the form title to the top of the instructions; the first page of the PowerForm does not have a title.

5. Select "**Create**"

CREATE

6. Copy the PowerForm URL by selecting "**Copy**"

PowerForm URL

URL LINK   EMBED CODE

URL

https://na4.docusign.net/Member/PowerFormSigning.aspx?PowerForm...

COPY

    a. There are different places to copy a PowerForm URL after the PowerForm has been created.

        i. Go to **Manage** OR **Forms** on the top navigation bar

            1. Select "**PowerForms**" on the left

            2. Scroll to the PowerForm, select the arrow button, then select "**Copy URL**"

        ii. OR go to **Templates** on the top navigation bar

            1. Select a template title to open the template details

            2. On the template details page scroll down to **Associated PowerForms**

            3. Select "**Actions**" then "**Copy URL**"

POWERFORM MANAGEMENT

You can only edit PowerForms created from templates owned by or shared with you.
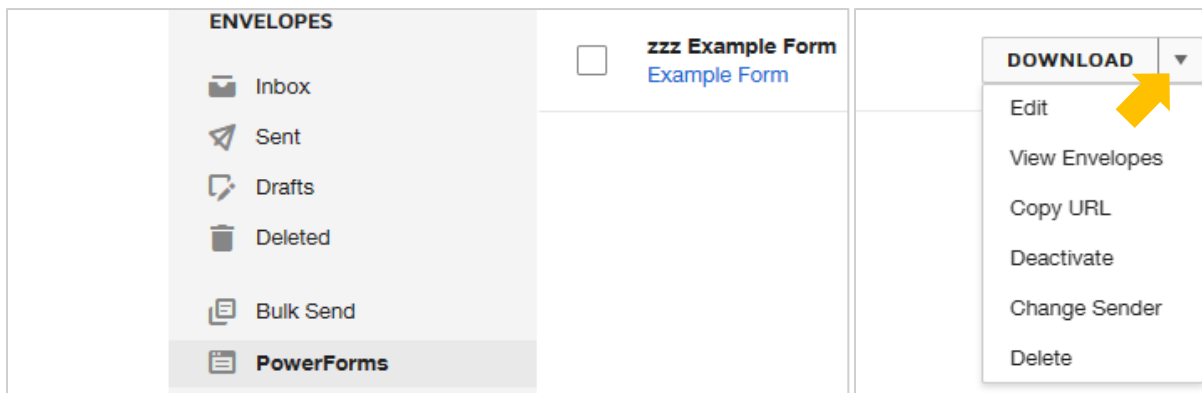
To view PowerForms

1. Go to **Manage** OR **Forms** on the top navigation bar
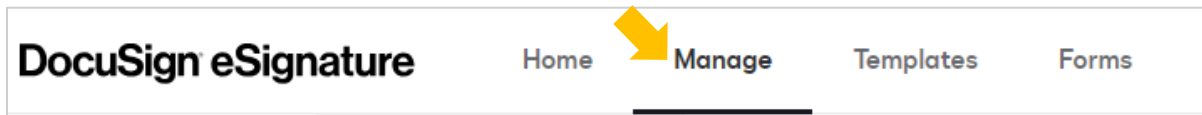
2. Select "**PowerForms**" on the left

Use the arrow button to open a list of actions you can take on a PowerForm.

a. **Download**: downloads an excel file of all responses in the selected date range

b. **Edit**: make changes to a PowerForm's name, email subject, instructions, etc.
   Note: You can only edit PowerForms created from templates owned by or shared with you

c. **View Envelopes**: open a listing of the PowerForm submissions/responses (AKA envelopes)

d. **Deactivate**: deactivated forms cannot be submitted; the URL gives an error when accessed

e. **Change Sender**: the "sender" is the user listed in all emails associated with a form
   Note: If you've created a PowerForm for a different user or department, make them the sender