

# DocuSign Consulting – Quick Wins (Videos and Guides)

## *Business Pro Version*

### **DocuSign Account “Good to Know”**

- Account Tour – [Video](#)
- Email Notifications Settings – [Video](#)
- Sending Documents – [Video](#)
- The Signing Experience for Recipients – [Video](#)
- Sign a Document Yourself – [Video](#)
- Set up a Sandbox (testing) – [Link](#)

### **Building Templates:**

- Templates – [Video](#)
- Manager Recipients – [Guide](#) & [Video](#)
- Using Templates – [Guide](#)
- Template Matching – [Video](#) | [Guide](#)
- Apply a Template to an Envelope – [Video](#)
- Send an Envelope using a Template - [Video](#)
- Combining Templates – [Guide](#) & [Video](#)
- Share Templates – [Guide](#)

### **Managing Envelopes:**

- Managing Your Documents – [Video](#)
- Correcting Envelopes – [Video](#) & [Guide](#)
- View Shared Envelopes – [Video](#) & [Guide](#)
- Manage Folders – [Guide](#)

### **Added Knowledge and Advanced Configurations:**

- Assign the Specify Recipient Action – [Video](#)
- Field Properties – [Guide](#)
- Field Types – [Guide](#)
- Auto Place – [Guide](#)
- Checkboxes and Validation – [Guide](#)
- Formula's – [Guide](#)
- Conditional Logic – [Guide](#)
- Download and Upload Templates – [Guide](#)
- In Person Signing – [Guide](#)
- Payments – [Guide](#) & [FAQ](#)
- Comments – [Guide](#)
- Attachments – [Guide](#)

### **Powerforms:**

- Powerforms vs Templates – [Guide](#)
- Create Powerforms – [Guide](#)
- Distribute Powerforms – [Guide](#)
- Edit a Powerform – [Guide](#)
- Using a Powerform – [Guide](#)
- Powerforms – [\(Multiple videos\)](#)

### **Bulk Sending Envelopes:**

- Bulk sending overview – [Guide](#)
- Sending Documents Using Bulk Send – [Guide](#)
- Using Bulk Sending – [Guide](#)
- Bulk Sending Standards – [Guide](#)
- Create a Bulk Send Recipient List – [Guide](#)
- Bulk Send for Multiple Recipients – [Guide](#)
- Custom Email/Language Bulk Sending – [Guide](#)

### **Admin Videos & Guide:**

- DocuSign eSignature Admin – [Guide](#)
- Account Administration Overview – [Video](#)
- Add & Edit Users – [Video](#)
- Administrator (*Envelope Sharing*) – [Video](#) & [Guide](#)
- Reports Overview – [Video](#)
- Reports \*Custom – [Video](#)
- Brands – [Guide](#) ([Multiple Videos](#))

### **DocuSign University Learning Plans / Courses:**

- [Getting Started with DocuSign – Admin](#)
- [Getting Started with DocuSign – Sender](#)
- [Getting Started with DocuSign – Signer](#)