



The Global Standard for eSignature

## DocuSign Sample Use Cases

DocuSign Team

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DOCUSIGN CONFIDENTIAL

# DocuSign Sample Use Cases



## Sales

- Sales Order Processing
- Customer Account Provisioning
- Special Deal Terms
- Partner Agreements
- Referral Agreements
- Reseller Agreements



## HR

- New Hire Paperwork
- Candidate NDA
- On/Off-boarding Checklist
- Employee Policy Distribution and Signature
- Contractor Agreements
- Non-disclosure
- PTO Management



## Finance

- Invoice Processing
- Expense Reporting
- Capitalization Mgmt
- Audit Signoff
- Policy Management
- Inventory Signoff
- Asset Transfer/ Retirement



## IT / Operations

- Asset Tracking
- Change Requests
- Requirements Sign Off
- Access Management
- Incident Reporting
- Production Change Authorization
- Maintenance Authorization



## Legal

- Contracts
- Non Disclosures
- Internal Compliance
- Intellectual Property Licensing
- Outside Counsel Agreements



## Marketing

- Event Registration
- Customer Communication Approvals
- Mass Mailing / Email Approvals



## Facilities

- Front Desk Sign-in
- Work Orders
- Lease Agreements
- Move In / Move Out Requests
- Parking Permits



## Support

- Account Change
- Service / Work orders
- Terms Change
- Self Service Requests
- Compliance
- Field service



## Product Management

- Change Management
- Release Management
- Code Review Reporting
- Requirements Acceptance
- Release Scope Commitment



## Procurement

- Purchase Order
- Statement Of Work
- Master Service Agreement
- RFP Sign Off
- Supplier Compliance

# Sales - Sales Orders Processing

- Salesforce Integrated
- Real-Time Order Control
- Custody Management

The image displays two overlapping software windows. The background window is the Salesforce CRM interface, showing an 'Opportunity' for 'Microfabrica'. The foreground window is a DocuSign 'Order Form' for 'Clarity Security LLC - New Customer'. The DocuSign form includes contact information for both parties, a table of products, and a total amount of \$1,375.00. A large yellow watermark 'In Progress' is overlaid on the DocuSign form.

**Salesforce Opportunity Detail:**

Opportunity Name	Mic
Account Name	Mic
Order Type	New
Amount	USD
FinanceRecurringRollup	USD
FinanceNonRecurringRollup	USD
FinanceCMRR	USD
FinanceACV	USD

**DocuSign Order Form Details:**

DocuSign Envelope ID: 62D189C3-01F7-43CC-A839-9454823F3D0F

DocuSign, Inc. 1301 2nd Avenue, Suite 2006 Seattle, WA 98101

**Order Form**

Proposed By:	Michael Hunt	Date:	May 01, 2012
Phone Number:	(415) 480-1000	Quote Valid Until:	Nov 31, 2012
Email Address:	michael.hunt@docuSign.com	Doc ID:	45994
Proposed For:	Clarity Security LLC		
	Hugo Rosales (CEO)		
	(407) 444-2095		
	hugo@claritysecurity.com		

**Bill To:** Hugo Rosales, Clarity Security LLC, AZ, (407) 444-2095

Product Code	Product Name - Description	Unit Price	Qty	Totals (\$)
120002215	DocuSign for Sales - Salesforce (Seats)	\$275.00	5	\$1,375.00
14000051	DocuSign Self-Binding Subscription	\$0.00	1	\$0.00
8001010	Training - QuickStart	\$0.00	1	\$0.00

**Order Terms:** Order Start Date: May 11, 2012; Form: 12/mcr/mcr; Seats: 5

**Grand Total:** \$1,375.00

Optional C-Check (per User, US Only): \$2.50  
Optional One-Click Authentication (per User, International rates may apply): \$0.75

# Customer Service: Account Change

- Account Change Approvals
- Automate Change Workflow
- Audit Trail For Changes



# Vendor Management – Purchase Order

- Purchasing Authority
- Approval & Routing
- Asset Tracking Workflow

**DocuSign** Subject: Please DocuSign these documents: Purchase Order Request over 5K -- F5 Maintenance Renewal

Close More Options

Name:   
Date of Request:   
Date Needed:

Please check one:  
Budgeted:   
Unbudgeted:

**Provide Explanation / Value of purchase:**

This is an annual maintenance agreement for 15 fixed bitstreams delivered to 'User 1', for primary production. Description: Please describe any criticality to the function of the production site. Please include the date of the last update.

**Payment information**

Pay by Company Check:   
Company Credit Charge:   
Employee Expense:   
ACH/Wire:   
(If you attached vendors wire instructions)

Recurring Start Date:   
End Date:   
Frequency:

**\*\* Finance will fill in Grayed out Se**

Item	Description	Qty	Unit Price	Total Amount	Vendor Name	GL Number	2012 Budget
15 annual maint	annual maintenance renewal providing patch and upgrade access.	1	4507.50		9238 (18 net)	00-0000-12000	EXPNS 00-0000-40000
25 by 7 support	24 by 7 support for issues with production tool behavior's	2	241.37	3287.14	de11	00-0000-12000	EXPNS 00-0000-40000

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# Finance - Invoice Processing

- Signature Authority
- Payables Workflow
- Invoice Archive

The screenshot shows a DocuSign interface for an invoice approval. At the top, the DocuSign logo is on the left, and the subject 'Invoice Approval - UTEST 7257' is on the right. Below the logo is a toolbar with 'Close' and 'More Options' buttons, and icons for print, email, and other actions. The main content area displays a 'RECEIVED' stamp with the date '4/10'. Below this is the heading 'Details for Order 1580' and the uTest logo. To the right of the logo is the uTest company address: 'uTest Inc, 153 Cordaville Rd, Southborough, MA 01772, Main 508.480.9999, Fax 508.480.9975, billing@utest.com'. Below the logo and address is the 'Sold to' information for DocuSign Inc.: 'Lydia Extein, 111 Sutter St Ste 1000 San Francisco 94104, United States, nathaniel.mitchell@docuSign.com'. To the right of this is the 'Date: Tue Apr 10 11:56:16 UTC 2012' and 'Invoice #: 7257'. A handwritten note 'PO-2012-1235' is written in red over the invoice number. Below this is a table with columns 'Item', 'Description', and 'Price'. The table contains one row: '1 Test Cycle Pack \$1,500.00'. At the bottom right, there is a summary section: 'Order Total: \$1,500.00', 'Payment Received: (\$0.00)', and 'Balance: \$1,500.00'. The 'Balance' row is highlighted in red. At the bottom left, it says 'Terms NET 0'. At the very bottom, there is a footer with 'POWERED BY DocuSign', 'English (US)', 'Terms Of Use', 'Support', 'Feedback', and 'Copyright © 2012 DocuSign, Inc. All rights reserved.'

# HR - New Hire Paperwork

- New-Hire Packet Automation
- First DocuSign Experience
- Reduced NIGO

The screenshot displays a DocuSign document viewer interface. At the top, the DocuSign logo is visible, followed by three numbered steps: 1. Review Document, 2. Sign then Confirm, and 3. Save your Copy. Below the logo is a toolbar with various icons for document manipulation. The document being viewed is titled "I-9.pdf" and is page 3 of 5. The document content includes the following sections:

DocuSign Envelope ID: 8582398E-454D-404E-A3E2-9EADCB8D28C9

OMB No. 1615-0047; Expires 08/31/12

Department of Homeland Security  
U.S. Citizenship and Immigration Services

**Form I-9, Employment Eligibility Verification**

Read instructions carefully before completing this form. The instructions must be available during completion of this form.

**ANTI-DISCRIMINATION NOTICE:** It is illegal to discriminate against work-authorized individuals. Employers CANNOT specify which document(s) they will accept from an employee. The refusal to hire an individual because the documents have a future expiration date may also constitute illegal discrimination.

**Section 1. Employee Information and Verification** (To be completed and signed by employee at the time employment begins.)

Print Name - Last First Middle Initial Maiden Name

Address (Street Name and Number) Apt. # Date of Birth (mm/dd/yyyy)

City State Zip Code Social Security #

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.

Identify, 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 #)
- An alien authorized to work (Alien # or Admission #) (expiration date, if applicable - mm/dd/yyyy)

Employee's Signature Date (mm/dd/yyyy) May 1, 2012

**Preparer and/or Translator Certification** (To be completed and signed if Section 1 is prepared by a person other than the employee.) I attest, under penalty of perjury, that I have assisted in the completion of this form and did so on the basis of my knowledge of the information in, on, and correct.

Preparer's/Translator's Signature Print Name

Address (Street Name and Number, City, State, Zip Code) Date (mm/dd/yyyy)

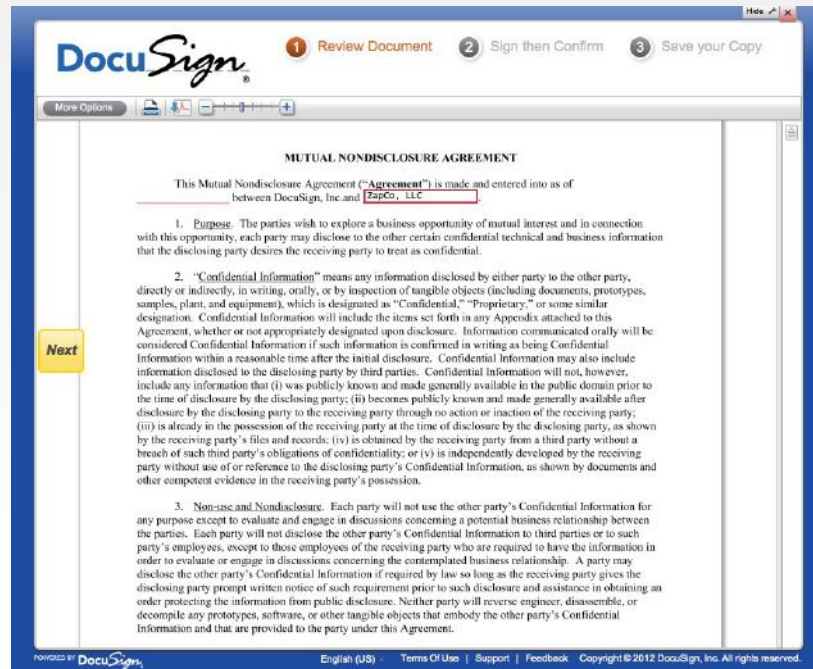
**Section 2. Employer Review and Verification** (To be completed and signed by employer. Examine one document from List A OR examine one document from List B and one from List C, as listed on the reverse of this form, and record the title, number, and expiration date, if any, of the document(s).)

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# Facilities – Front Desk Sign-In

- Assures Signed NDA
- In-Person Sign-in
- Security Policy Enforcement









# Operations - Change Management

- Change Authorization
- Sequence Workflow
- Tied To InfoSec Audit

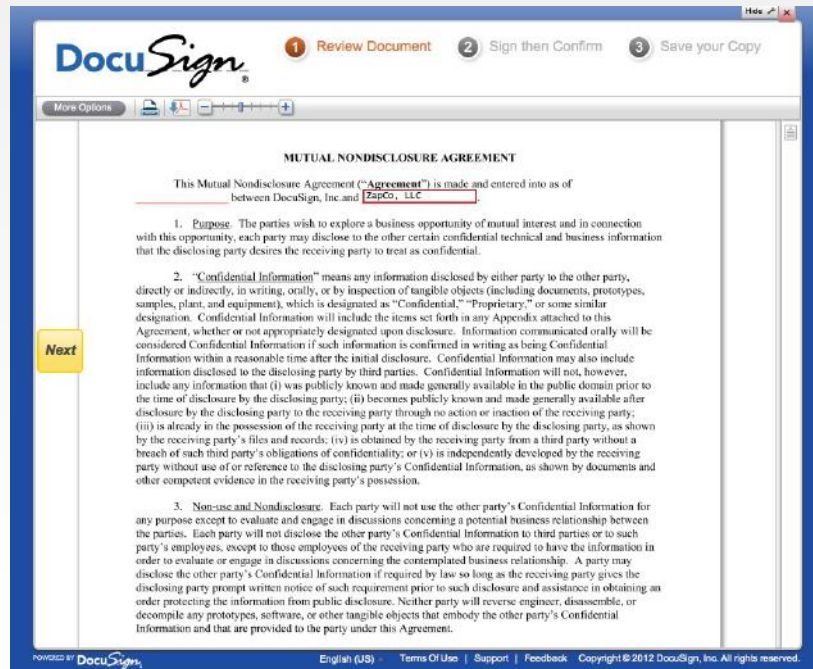
The screenshot shows a DocuSign document window. The title bar reads "DocuSign" and "Subject: Authorization Infrastructure Change Production - Update Janrain property to allow id creation". The document content includes a table with the following data:

Authorization - Infrastructure Change Production	
Infrastructure to Update	DocuSign Janrain configuration
Deployment Consideration	none
Required Authorizations	
Operations Manager approves change for production	 July 16, 2011
QA certifies changes have been tested and the change is approved for production	 No QA Required July 16, 2011
Operations has completed the infrastructure change	 November 10, 2011
CTO notified of production change	 July 17, 2011
Product Development Notified	July 17, 2011

At the bottom of the document, it says "Authorization - Infrastructure Change Production.pdf" and "1 of 1". The footer includes "POWERED BY DocuSign", "English (US)", "Terms Of Use", "Support", "Feedback", and "Copyright © 2012 DocuSign, Inc. All rights reserved."

# Legal – Contract Signing

- Signing Authority
- Instant Revisions
- Renewal management



# Product – Release Management

- Formal Authorization
- Workflow Enforcement
- Release workflow

The image displays three overlapping screenshots of the DocuSign web interface, illustrating its release management capabilities.

- Top Left Screenshot:** Shows an email envelope titled "Authorization for Feature Release - 06-04-2012" from Nat. Mitchell. The envelope status is "Completed". A list of actions is visible, including "Signed by Nat. Mitchell", "Signed by Donald G Peterson", "Signed by Karen Orr", "Signed by Doug Rybacki", "Signed by Karen Orr", "Signed by Eric Anderson", "Signed by Eric Anderson", "Signed by Karen Orr", and "Copy sent to All Employees".
- Top Right Screenshot:** Shows the "User & Account Identifier" settings for a user named "Damon". It lists various preferences such as "Signatures", "ID card", "Manage Secure Fields", "Address book", "Template matching", "Permissions", "Account Administration", "Branding", "Login", "Sign", "Completion Email", and "Envelope Activation Email".
- Bottom Screenshot:** Shows a "PRODUCTION" schedule table with columns for dates and times, likely used for managing the release workflow.

# Marketing - Event Registration [Demo]

- Create The Form
- Add Payment Processing
- Create PowerForm
- Register and Pay



The screenshot shows a registration form for the event "MOMENTUM 2012 EMEA" at the "LONDON FILM MUSEUM" on "9TH OCTOBER". The form is branded with the DocuSign logo and the tagline "eSignature & Beyond". The registration type is set to "Attendee".

Please fill out the information below, then click Next to proceed.

\* First Name:

\* Last Name:

\* Email Address:

\* Registration Type:  Attendee  [Already Registered?](#)

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