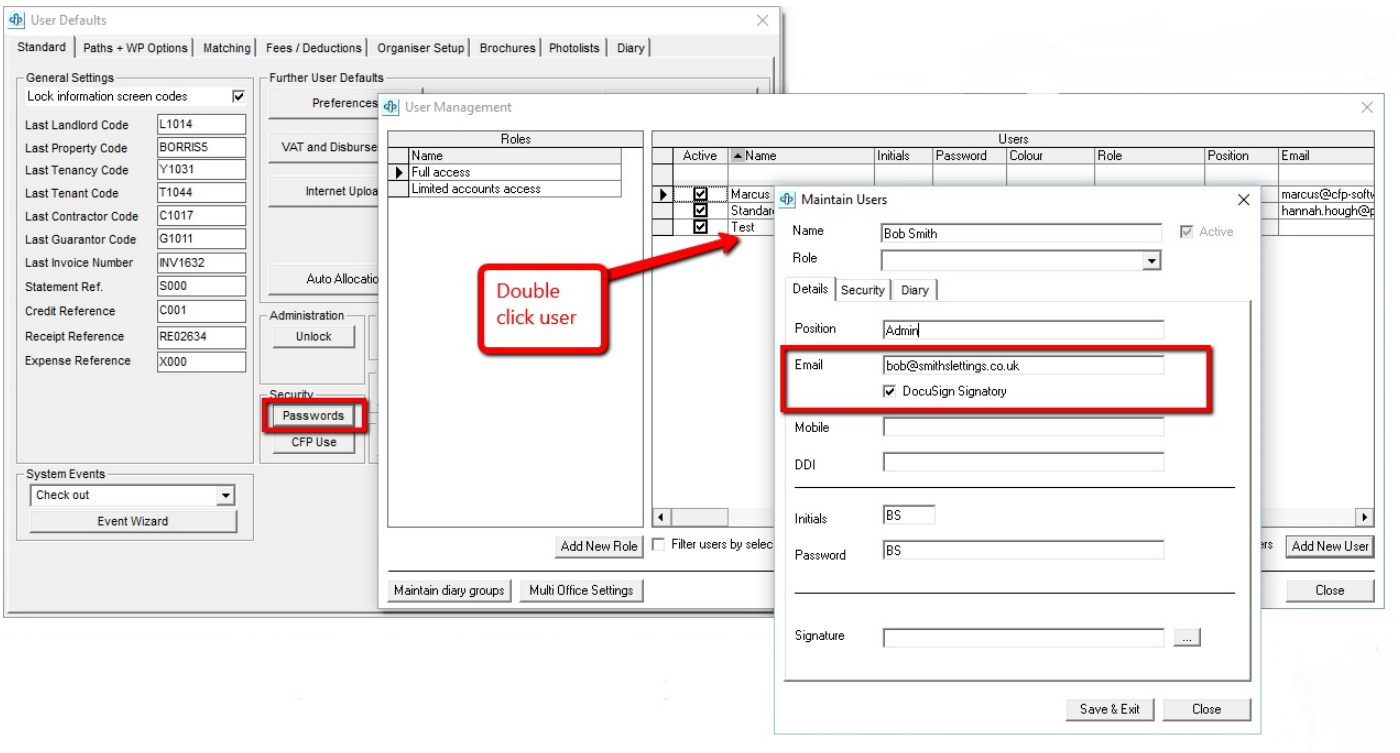
Adding a new Docusign User

Please see the below instructions for adding a new Docusign user. You will need to have purchased a licence from our Customer Service department for this to be enabled.

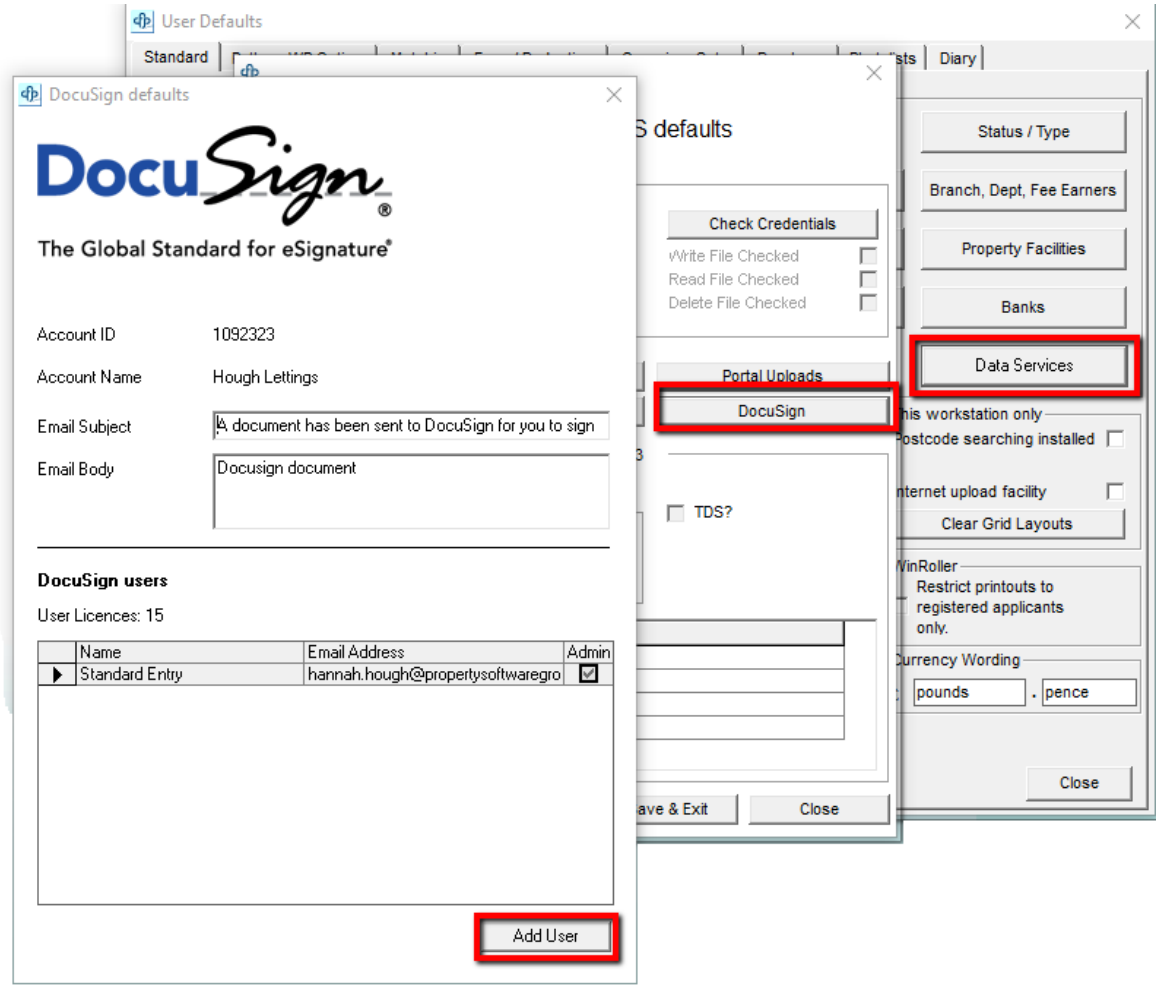
- Go to Defaults\User Defaults\Passwords – *this may need to be actioned by a Manager, who has access to the Passwords section.*

- Double click the new Docusign users Name and make sure that an email address has been entered, and tick 'Docusign Signatory' if you want to enable this feature. Now when a document that contains a Landlord Signature tag is created, on the **Post Envelope Screen** the user can select a **DocuSign Signatory** address from the drop down box, instead of using the Landlord email address.



Adding a new Docusign User

- Then Go to Defaults\User Defaults\Data Services\Docusign
- Press Add User

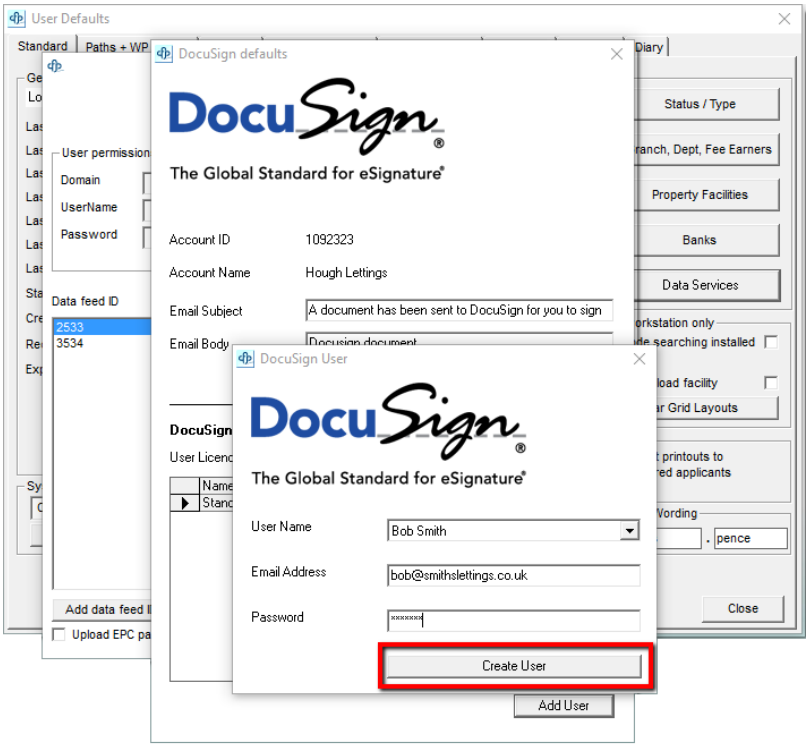


- Choose your new Docusign user from the drop down list, make sure that the email address has pulled through from the passwords table and that it is correct and has no typos

- Choose a Docusign password for the new user, this is the password they will use to log into Docusign online. We recommend making a note of this password for future reference, and if it is ever changed, please notify CFP so they can update the database.

Adding a new Docusign User

- Press Create user



- The user will then receive an email from Docusign asking that they activate their account. They need to click on the link and type in the password you entered into the Create user box.

Docusign is now activated for this user in CFP.

If you feel that you would prefer to go over this with a trainer or want to ensure that you are making best use of this facility telephone training is available please call 01209 314371.

or

Should you have any queries regarding the information in this help sheet, please do not hesitate to contact The Support Team on 01209 313121.