How do I add fields to a document in DocuSign?

Tell Me

Important Background Information:

- After opening/creating an envelope, click the black Next button at the bottom right of the screen to be taken to the page where you add fields.
- On the left of the next screen is the Fields Toolbar. This toolbar houses all of the fields that can be placed on a document.
  - **Standard Fields** includes all the fields that get completed by a recipient in DocuSign.
  - **Custom Fields** (the tab with the wrench below the Standard Fields tab on the left side of the page) includes all of the SSO fields and all fields including default validation.
    - SSO fields are fields that will be prepopulated by Single-Sign-On. This means that these fields pull information from the DocuSign login (like name and email) and are populated by this information upon a recipient opening a document. This also means that recipients are unable to edit information in these fields. It is also important to make sure SSO fields are added for the correct recipients. You should not add SSO fields for recipients filling out a form on behalf of someone.
    - Fields with default validation means that they already have validations (date or employee ID for example) built into them to make sure the correct information is being inputted into these fields by recipients.
- When you click a field, a gray menu appears on the right side of the page. This is where you can change formatting options for fields and give them tool-tips or validations. It is also important to note that you shouldn't edit the data labels for SSO fields.

Adding a Field:

1. You need to specify who is going to complete a field before you add it. To do this, click the drop-down menu in the top left-hand corner of the page (labeled with the first role on the document) and select the role for which you are adding a field.
   a. To change which role needs to complete a field on the document, click the field and select which role needs to complete the field in the drop-down menu under **Recipient** in the gray menu on the right side of the page.
2. Select the field you would like to add and drag it where you want it to be on the document.
   a. More information about when to use different types of fields can be found in the "Show Me" section.
3. Format the field in the gray menu to the right of the page.
4. Do this until the form appears how you would like it to.
5. Make sure to click **Recipient Preview** in the top right corner of the page as fields may not appear for recipients how they appear in this stage. This allows you to make sure everything will look how it should for recipients.

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