Can I add fields to a document?

Tell Me

1. Once opening an envelope, click Correct, which can be found above the Recipients heading. How do I get to this point?
2. Click the Next button at the top and bottom of the right side of the screen. This takes you to the actual document where you can make edits.
3. Select which role you are adding a field for in the drop-down menu at the top left side of the screen.

You need to specify which role you are adding a field for before you add it so DocuSign knows who is supposed to be filling out which fields. For example, if you were adding a place for someone named Jane Doe to sign on a document, you would select Jane Doe from the drop-down, then add a signature field. Each roles' fields have a different color during editing so you are able to differentiate which fields are for whom on the document.

4. There are two ways to add a field from this point. You can select a field from the menu on the left that you would like to add and click where on the document you would like to place it. You can also drag and drop fields to where you want them on the document.
5. To move a field, select and drag it where you would like it to be.

You are unable to edit fields that have been completed by signers.

6. Click the Next button at the top and bottom of the right side of the screen followed by the Correct button to save your changes. Clicking Correct also resends the document to whoever is currently signing so roles have an updated copy of the document to sign.
7. To discard your unsaved edits, click Actions next to the Correct button followed by Discard Changes.

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