DocSeal User Guide

Step-by-step instructions for routing an internal paper for signature.

Getting an account

There's no sign-up page - an admin adds you. When they do, you'll get an email with a link to set your own password. Click it, choose a password, and you're straight into your dashboard. That link only works once and expires after a few days, so use it promptly.

Sending a document for approval

1. Start a new approval

From your dashboard, click **New approval**. Give it a short title and, if it helps, a one-line note explaining what you're asking people to approve.

2. Upload the document

Upload a PDF, or drag one onto the page. Any fillable form fields in the file are locked down as part of this, so nothing in it can be changed after signing. Password-protected PDFs aren't accepted - remove the password first (most PDF viewers can "print to PDF" to make an unprotected copy).

3. Add the people who need to sign

Add each person in the order they should sign, with a role label (Reviewer, Approver, etc. - whatever fits). People are emailed **one at a time** - the next person only gets notified once the person before them has made their decision. This tool is for people inside your own company only - if an outside client, vendor, or auditor needs to sign, use DocuSign instead.

4. Show people exactly where to sign (optional)

You can skip this - every signature just gets added as a summary page at the end of the document. Or, place fields directly on the document itself: pick a signer, choose a field (Signature, Date, Name, or a custom question), and click or drag it onto the page where it belongs. Move or resize it anytime before sending.

5. Send it

Click **Sign & send for approval** to email the first person right away, or save it as a draft to send later.

What happens after you send it

If everyone approves

Once the last person signs, everyone's signatures are merged into the original PDF and it's sealed - after that point, any edit to the file becomes detectable. You'll get an email, and the finished document is ready to download from your dashboard.

If someone rejects it

The whole approval stops immediately - it doesn't skip ahead to the next person. Everyone still waiting has their link cancelled, and you (the sender) get an emailed explanation of who rejected it and why. You'll need to fix the issue and send a new approval if you want to try again.

Changed your mind? You can void it

Sent something by mistake, or plans changed? Open the document and choose **Void this approval**. This immediately cancels every link still waiting to be signed and lets anyone who already had a pending link know it's no longer needed. This only works before the approval is finished - once everyone has signed and it's sealed, it can't be undone.

Waiting on your own signature?

If someone has sent *you* something to sign, you'll see it front and centre at the top of your own dashboard as soon as you log in - you don't need to go hunting through email for the link.

What a signer sees

1. A personal, one-time link

Each signer gets their own email with a link meant only for them. It only works once you decide (approve or reject) and only for the address it was sent to. Nothing about the document is shown until it's actually your turn in the chain.

2. See exactly where your signature will land

Before you sign anything, the document preview shows you the real page, with your signature, date, and any other fields marked right where they'll actually appear in the final document - no surprises.

3. Sign your way

Draw your signature with a mouse or finger, type your name (it's turned into a neat handwriting-style image), or upload a photo of your signature. Answer any other questions you've been asked, then approve or reject - rejecting requires a short note explaining why.

What makes this a real signature

- You have to actively confirm you mean to sign - it's not a pre-ticked box.
- Your link only works for one specific email address, confirmed before you see anything.
- Every action is recorded in a tamper-evident history that can't be edited or deleted afterward - if anyone tries to alter the finished document, it's detectable.
- That history is also saved as a portable file next to the document itself, not buried in a system log somewhere.

What this tool is not for

- External people - clients, vendors, auditors. Use DocuSign for anyone outside the company.
- Anything legally requiring a "qualified" electronic signature - that needs a licensed provider, not this tool.
- Notarised documents, witnessed signatures, or anything needing a wet-ink original.
- Get sign-off from your own legal/compliance team before treating this as a full DocuSign replacement for anything sensitive.