

DocuSign: How to send a revised document when an existing document is out for signature

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This process locks down DocuSign so that only one document is out for customer signature at a time.

If you need to send an revised document, follow the process below.

Verify document is out to the customer

1. Click the dropdown menu
2. Check to see if **Send for signature DS** displays
 - a. If is not visible = document is already sent to the customer. To send a new one, you must void the previously sent one.

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 - b. If Send for signature DS does display = no document is out to the customer. Follow your normal process to send a new document.

Void existing document

1. Go to **Related** tab
 2. Locate document
 3. Click **Void Envelope**
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4. Type in reason for voiding envelope
 5. Click **Void**
-
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Send revised document

1. Go to the Details tab



NOTE: Refresh page. Can take up to approx 1 minute for the Send for signature DS option to display.

2. Click dropdown menu

3. Select Send for signature DS and go through the normal process to submit a document - [DocuSign Steps](#)

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For a video on this process, watch it [DocuSign Lockdown-20240529_093446-Meeting Recording.mp4](#).