**How to generate a DocuSign envelope from MSD**

**Prerequisites: check file** [Prerequisites to have access to use DocuSign directly from MSD.docx](https://nielsenenterprise.sharepoint.com/:w:/s/Q2CCPQCLM/ESYPDs0xgBpIim0ZmzR-gZUB64rHN29ws5UkJsYvAHFLeA?e=Qr1F9V)

1. Once the contract is ready to be signed, go to the corresponding Opportunity in MSD:

*A screenshot of a computer

Description automatically generated*

1. Upload the contract version that is ready to be signed (If not already added) and any additional documentation needed in the Opportunity under **Files** section:

***Upload -> Choose File ->* Select the documents *-> OK***

A screenshot of a computer

Description automatically generated

A screenshot of a computer

Description automatically generated

1. Click on the 3 dots at the right-top of the window and select **Send with DocuSign**

A screenshot of a computer

Description automatically generated

1. Click on **Get Signatures**

A screenshot of a computer screen

Description automatically generated

1. A list with the documents attached in the **Files** section will appear. Select the documents that you need to include in the envelope and click **Continue**

A screenshot of a computer

Description automatically generated

1. A pop-up with the contacts included in Opportunity will show up.

Currently, it picks up the contact added in the **Invoice Recipient** field on the Opportunity.

If that is the correct signer, select it and the contact information will automatically be brought into the envelope.

If not, leave it unselected.

A close-up of a logo

Description automatically generated

A close-up of a contact us

Description automatically generated

1. You can also search for the correct contact or contacts

Click on **Search Contacts** -> In the new window, add the contact name -> Select it and click **Add ->** Will be added in the list of contacts

A close-up of a computer screen

Description automatically generated A white rectangular object with a black border

Description automatically generatedA blue square with white squares

Description automatically generated

1. Click on **Open DocuSign** and the DocuSign envelope will be created and opened automatically

A screenshot of a computer

Description automatically generated

1. The documents and contacts added earlier in MSD will automatically be included in the envelope

A screenshot of a computer

Description automatically generated

1. On how to Configure the envelope check [How to configure an envelope in DocuSign.docx](https://nielsenenterprise.sharepoint.com/:w:/s/Q2CCPQCLM/EXrycssmpbFDmvw7GByZRN0BFTe6PtMqhrAuMss3PWoSjw?e=9bDIF4)