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My Page | Workflow

Personalize Content Layout Valerie Kessler (100750919)

My Menu

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- Change My Password

Create your Alteration in Forms Portfolio as you normally would and save as a PDF.

Log into DocuSign <https://account.docusign.com/> with your Fresno State Credentials

DocuSign

Please log in to your account

CONTINUE

No account? Sign up for free

Home Manage Templates Reports Admin

Sign or Get Signatures

NEW

Select "New" and "Send an Envelope"

Home Manage Templates Reports Admin

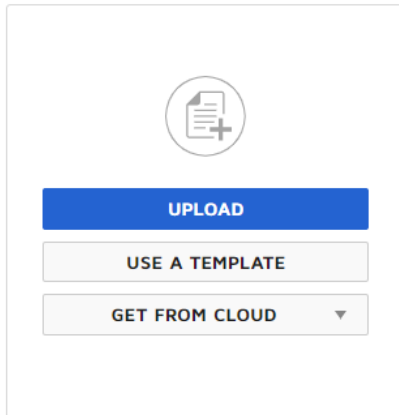
Sign or Get Signatures

NEW

- Send an Envelope
- Sign a Document
- Use a Template
- Create a PowerForm

Last 6 Months | WHAT'S NEW | CUSIGN ID

Add Documents to the Envelope



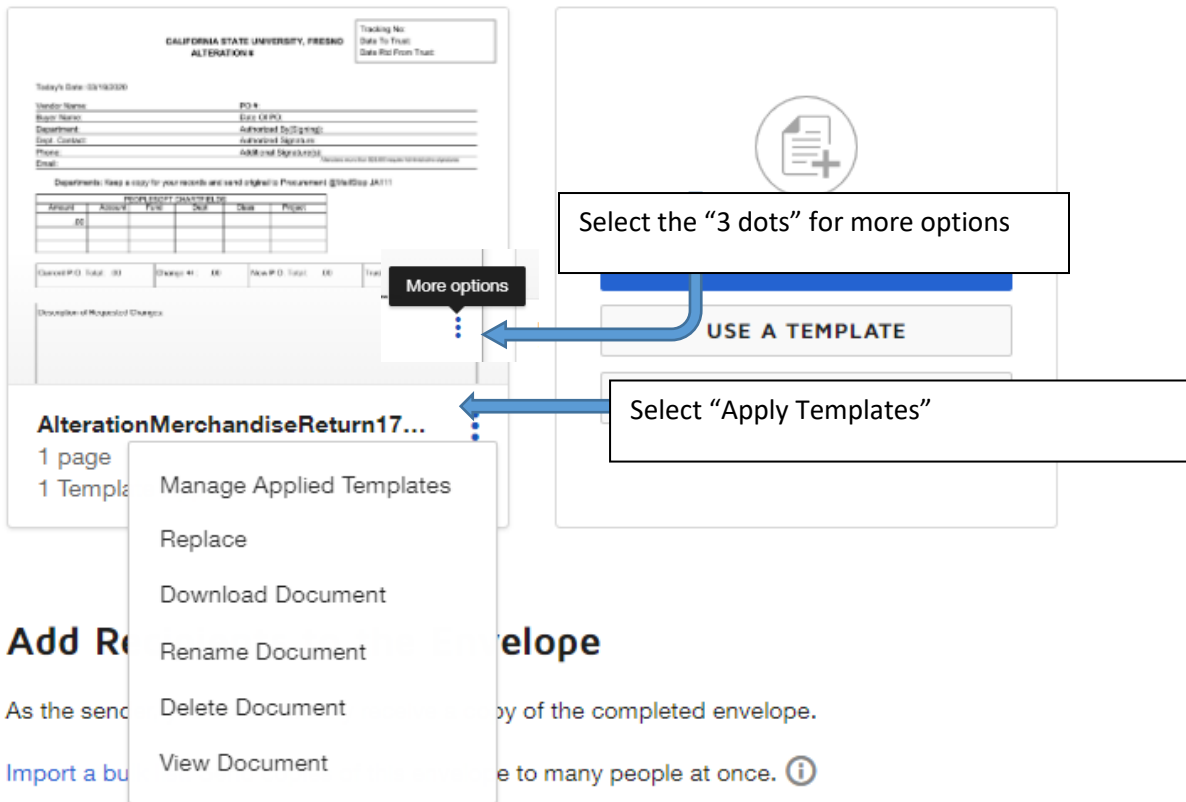
Select "Upload" to select your "Forms" PDF you saved.

Select upload again to add any additional documents.

NOTE: When you upload, DocuSign may pop up a template it thinks you need. Disregard it by canceling the pop up window and apply the template per the instructions below.

NOTE: If you are uploading **multiple** Alteration Forms you must apply the template to each of the pages where you need the approval signatures. Repeat the process below until the template is applied to each signature page.

Add Documents to the Envelope



Apply Templates for AlterationMerchandiseReturn179800.pdf

SUGGESTED **BROWSE**

1. Select "Browse"

2. Select "Shared Folders"

3. Select "Procurement"

4. Select "Alteration"

5. Select "Apply Selected"

Name	Owner	Last Change
<input checked="" type="checkbox"/> Alteration Template	Valerie Kessler	
<input type="checkbox"/> Please DocuSign: Procard Approval	Valerie Kessler	3/18/2020 02:45:10 pm
<input type="checkbox"/> Purchase Requisition - Template	Valerie Kessler	3/18/2020 09:41:40 am

APPLY SELECTED CANCEL

The template is designed to represent the signature flow of the **Alteration Form**. You can remove any unwanted signature blocks below, by pressing the “X” to remove. (See screen shot at bottom)

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list](#). Send copies of this envelope to many people at once. ⓘ

Set signing order

1 **Signer 1** ✎ NEEDS TO SIGN ▾ MORE ▾

Name *
Valerie Kessler

Email *
vkessler@csufresno.edu

Enter the Appropriate contact information

2 **Signer 2** ✎ NEEDS TO SIGN ▾ MORE ▾

Name *
Valerie Kessler

Email *
vkessler@csufresno.edu

3 **Procurement** ✎ NEEDS TO SIGN ▾ MORE ▾

Name *
Valerie Kessler

Email *
vkessler@csufresno.edu

2 **Signer 2** ✎ NEEDS TO SIGN ▾ MORE ▾

Name *
Valerie Kessler

Email *
vkessler@csufresno.edu

Select “X” to remove additional unwanted approval blocks

It is **very important** to enter the Vendor or Payee name in the Email Subject field.

Message to All Recipients

Custom email and language for each recipient

To: Valerie Kessler

Email Language *
English (US)

Email Subject *
Please DocuSign: Alteration
Characters remaining: 73

Email Message
Hello,
Please approve the alteration needed in order for payments to be processed.
any questions.
Characters remaining: 9857

To: Valerie Kessler

Email Language *
English (US)

Email Subject *
Please DocuSign: Alteration
Characters remaining: 73

Email Message
Hello,

SEND NOW **NEXT**

Very important to enter the Vendor or Payee name

Customize message as needed

Select "Next" to Review

**CALIFORNIA STATE UNIVERSITY, FRESNO
ALTERATION #**

Tracking No:

Today's Date: 03/19/2020

Vendor Name: _____ PO #: _____
Buyer Name: _____ Date Of PO: _____
Department: _____ Authorized By (Signing):
Dept. Contact: _____ Authorized Signature: _____
Phone: _____ Additional Signature(s):
Email: _____ Alterations more than \$25,000 require Administrative signature

Departments: Keep a copy for your records and send original to Procurement @MailStop JA111

PEOPLESFT CHARTFIELDS					
Amount	Account	Fund	Dapt	Class	Project
.00					

Current P.O. Total: .00 Change +/-: .00 New P.O. Total: .00 Trust Approval and Date: _____

Description of Requested Changes:

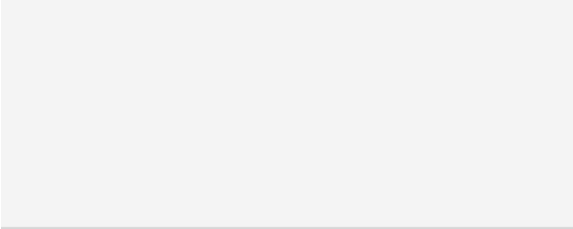
FOR PROCUREMENT USE ONLY

Approved By: Date Approved:

PS Entry By: Date Completed:

PeopleSoft Entry Comments:

NOTE: You might need to move and align these fields with your uploaded Alteration Form.



SEND NOW

NEXT

Once you Select "Send" the form will be sent to your designated approvers you assigned and then to the Procurement office. You will receive a notification once the document is complete.