

Using Templates

Overview

This guide provides an overview of how to use a template when creating and sending an envelope. Templates help streamline the sending process when you frequently send the same or similar documents. Templates allow you create a standard envelope, with set documents, recipient roles, signing and information tags. Templates can also contain the signing instructions for the document and any signer attachments.

The general steps to use a template are:

- Prepare an envelope, add a template or one or more documents and apply templates
- Replace role information with recipient information
- Review the subject and message for the envelope
- Verify the placement of tags in the documents
- Preview and send the envelope.

The procedures in this guide assume that you have a DocuSign account and are logged on to the console. For more information and details on any of these subjects, see the *Classic DocuSign Experience User Guide*.

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Starting a New Envelope from a Template

The process for using a template to create and send an envelope is similar to the normal process for creating and sending a new envelope.

IMPORTANT: When sending with a template, you need to be aware of the Data Population Scope setting for your account. If the account setting is **Envelope**, DocuSign tags with the same Label in all documents in the envelope will populate with the same data when a recipient enters or modifies information the tag. If the account setting is **Document**, DocuSign tags with the same Label in the same document in the envelope will populate with the same data when a recipient enters or modifies information the tag.

1. Click the **Send** navigation tab. The Prepare Envelope page is displayed.



Alternately, you can click **Create** button or click the **Actions** button and select **New Envelope**. If you are on the Home tab, you can click **Start a New Envelope**.

Note: You can save an envelope as a draft by clicking **Save Draft** at the bottom of the page. The saved envelope is placed in the Draft folder. You can exit the page without saving the envelope by clicking **Discard Changes** at the bottom of the page.

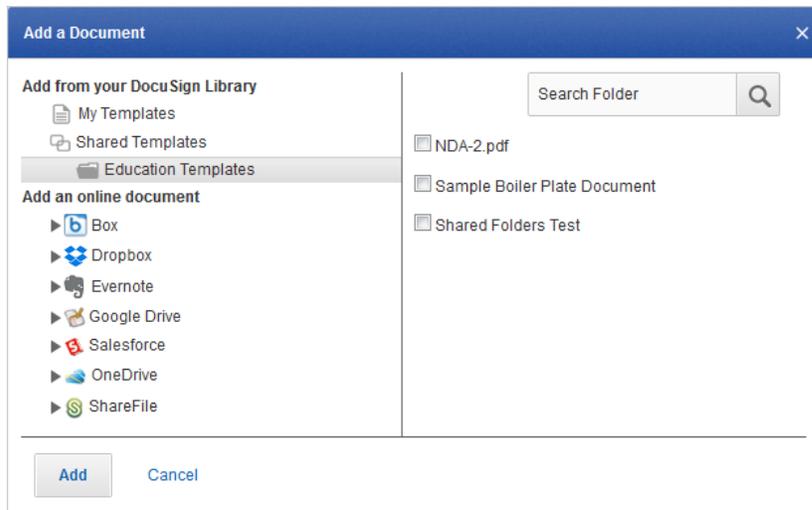
A screenshot of the DocuSign 'Prepare Envelope' page. The top navigation bar shows 'DocuSign' logo and tabs for 'Home', 'Manage', 'Send', and 'Dashboards'. The 'Send' tab is active. The page is divided into three main sections: 'Documents for Signature', 'Recipients and Routing', and 'Email Message'. The 'Documents for Signature' section has buttons for 'Browse from my Computer' and 'Choose an Online Document', with instructions to select and upload documents. The 'Recipients and Routing' section has input fields for 'Recipient Email' and 'Recipient Name', buttons for 'Add Signer', 'Add CC', and 'Add Bulk Recipient', and instructions to enter recipient information. The 'Email Message' section has a 'Subject to All Recipients' input field. At the bottom, there are buttons for 'Next', 'Send Now', 'Go Back', 'Save Draft', and 'Discard Changes', along with a 'Use Advanced Sending' checkbox. The footer includes 'POWERED BY DocuSign' and copyright information.

In the Documents for Signature section, you add documents from your computer or an online document, which includes templates and external documents.

2. Select the source of your document:



- **To upload a Template:** click **Choose an Online Document**, the Add a Document dialog box is displayed. Select the location of the Template use on the left side of the dialog box (Templates or Shared Templates). Select the Template on the right and then click **Add**. The document(s) in the template is added to the envelope and a thumbnail image of the document is added to the section.



3. Alternately, you can click **Browse from my Computer** to upload a document from your computer and, if Automatic Template Matching is enabled for your account, the system checks to see if the document you've uploaded matches a template in your system. If a match is found, the system gives you the option of applying that template to the document.

Also, after adding a document, you can click **Other Actions** to apply a template, match the document with a template, replace the document, or recognize form fields for PDFs with Adobe Form Fields.

4. Repeat Step 2 or 3 to add another document to the envelope.

Important: When you add or apply a template to an envelope and the template has a locked email subject and message (the **Sender cannot edit Subject, Message, or Note** checkbox is selected in the template), that subject and message is used for the envelope and cannot be changed even if another locked template is subsequently added or applied to the envelope. If you entered an email subject or message before adding or applying a locked template, a warning message saying that the email subject and message will be overwritten with the email subject and message from the locked template is shown.

5. You can make changes to the documents you've uploaded as described below:

- You can view a PDF version of the document by clicking on the document image.

- You can change the name of the uploaded document by clicking in the document name field and typing a new name.
- To move a document up or down in the order of appearance, click on the grip icon (☰) associated with the document and drag the document to the new location.
- To remove a document, click the remove icon (✕) associated with that document.

6. After all documents are added, go to the Recipients section to add envelope recipients.

Recipients and Routing

In the Recipients and Routing section you add recipients and, optionally, set the routing order and add identification methods. If the template you selected uses a bulk recipient file, you can review the bulk recipients and upload a new bulk recipient file. See the *Using the Bulk Recipient Feature* quick start guide or *DocuSign Service User Guide* for more information about using bulk recipients.

1. When sending from a template, placeholders for the recipients have already been added to the envelope. Replace the placeholder recipient Email and Role Name information with the Email and Name of your recipient.

Note: If the template uses an Access Code, Phone Authentication or ID Check Identify option for placeholder recipients, you should review the information to ensure it is correct for the recipient.

Order	Email	Name	Action	Identify
1		Applicant (required)	Sign ▼	Email ▼
2	steve.anderson_ds@yahoo.com	Steve Anderson	Sign ▼	Email ▼

2. You can add additional recipients by typing the Recipient's Email address and Name in the appropriate field. As you type, the system will provide suggestions to auto-fill the fields based on entries in your Address Book. Click **Add Signer** to add the recipient to the list with a Sign recipient Action or click **Add CC** to add the recipient to the list with a Receive a copy recipient Action.

Recipients and Routing

Recipient Email [Add Me](#)

Recipient Name

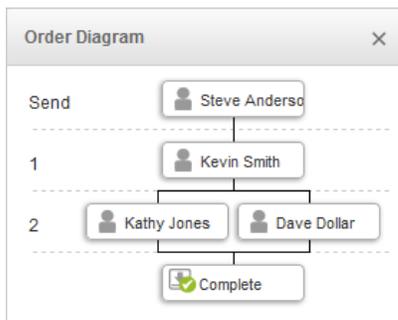
[Add Signer](#) [Add CC](#)

3. You can change the Actions and Identify options for any recipients you add.

Note: Depending on the settings the template creator used for the recipient role, you might be able to change the Actions and Identify options for those recipients.

4. Repeat steps 1 through 3 to add additional recipients.

- If you have multiple recipients, you can change the routing order in which the recipients receive the envelope and perform signing and other activities. To set routing order, type the **Order** in which your recipients receive and sign the document.
- Alternately, if you have already set the order for some recipients, you can click on the grip icon (☰) associated with the recipient and drag them to the new order. The Order number for the recipient is automatically updated.
- You can remove a recipient by clicking the remove icon (⊗) associated with that recipient.
- You can see a graphical representation of the routing order for your recipients by clicking the **Order Diagram** link.



5. After all recipients are added, go to the Email Subject section.

Adding Messages

In the Email Message section you can customize the email subject and, optionally, the messages for recipients. This information is usually already entered by the template creator, but you can modify this information as needed.

Email Message

Subject to **All Recipients**

Please DocuSign this document: New Account

Email Message to **All Recipients** (Characters Used: 0/2000)

[Customize email language for each recipient](#)

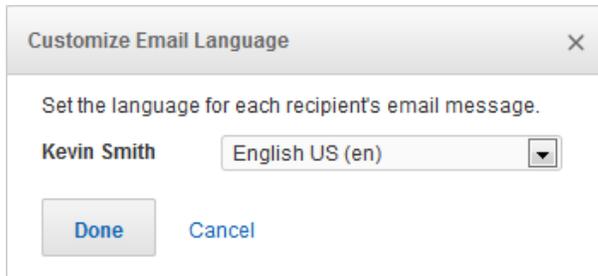
Add a Note to Add

1. Optionally, Type an **Email Subject** for the envelope and an **Email Message** for all recipients. The subject is limited to 100 characters and the message is limited to 2000 characters.
2. Optionally, add a note for a recipient:
 - Select the recipient for the message from the Add a Note to: list and click **Add**. The Custom note dialog box appears.
 - Type the message for the recipient. The message is limited to 1000 characters.
 - Repeat this step to add a message for a different recipient.

3. Optionally, you can select the email language used for a recipient. This option sets the language used in the standard email format for the recipient, but it does not translate the Email Subject, Email Message text or note text. You must type the subject, message or note in the correct language.

Note: This option might not be enabled for your account. If you have questions about the options available for your account, contact your Account Manager or DocuSign Customer Support for assistance. Visit our [Contact Support](#) web page for contact options to reach Customer Support.

- Click **Select recipient email language** the Customize Email Language dialog box appears.



- Select the language for each recipient and click **Save**. You are returned to the Prepare Envelope page and separate Email Subject, Email Message and Note fields are provided for each recipient.
 - For each recipient, type an **Email Subject** for the envelope. Optionally, type an Email Message and Note for the recipient.
4. After the Email Subject is added, you can optionally go to the Envelope Settings section. If you are not changing any Envelope Settings, you can:
 - Click **Next** to review or add tags in the documents.
 - Click **Send** to send the envelope.

Envelope Settings

The Envelope Settings section lets you set branding options, recipient options, reminders and expirations, and sender settings.

Note: If the person that created the template locked the template brand when creating the template, the brand cannot be changed.

When you are done changing any Envelope Settings, you can:

- Click **Continue** to review or add tags in the documents.
- Click **Send Now** to send the envelope.

Reviewing Tag Placement

The tags are usually placed by the template creator, but you can modify these and add new tags if needed.

1. To assign a signature, initial or other tag to a recipient, click on the recipient's name on the left side of the page and the Tag Palette is shown below the recipient's name.

Click and drag a tag from the palette and drop it on the document. For more information about tags and how to change tag properties, refer to the DocuSign Tag Information section in the *DocuSign Service User Guide* or online help.

2. Continue placing tags for this recipient until you have added all the needed tags.
3. Repeat steps 1 and 2 for each recipient in the document.

Previewing and Sending an Envelope

1. Optionally, before sending an envelope, you can preview how your recipient will see the tags by clicking **Preview**.

The screenshot shows the DocuSign interface in 'Preview' mode. The top navigation bar includes 'Home', 'Manage', 'Send', and 'Dashboards'. The 'Send' tab is active, and a status bar indicates 'Last Saved 3:46:16 PM'. The envelope is addressed to 'Kevin Smith [kevinsmith_DS@yahoo.com]; David Jones [david.jones_ds@yahoo.com]'. The message body reads: 'Please DocuSign this document: New Account'. The document title is 'New Account Agreement'. The content of the document is: 'To complete your application for a new account please provide the following information and a copy of a photo ID.' Below this, there are several form fields: 'Name: Full Name', 'Address:' (with two input boxes), 'City, State:' (with one input box), 'Signature:' (with a 'Sign Here' button and a red arrow pointing down), and 'Date: Date Signed'. A yellow 'Preview' callout is overlaid on the left side of the document. The bottom of the interface shows a 'Send' button, navigation options ('<Go Back', 'Save Draft', 'Discard Changes'), and a 'Use Advanced Sending' checkbox. The footer includes 'POWERED BY DocuSign', 'English (US)', 'Terms Of Use', 'Support', 'Feedback', and 'Copyright © 2012 DocuSign, Inc. All rights reserved.'

Select the recipient you want to preview tags for and use the arrowhead icons to advance or move back. Alternately, you can click **Auto-Advance** to automatically cycle through the tags.

Click **Exit Preview** or **<Go Back** to return to the Add Tags page.

2. When you have added all the needed tags and are done previewing the envelope, click **Send**. The envelope is sent and you are returned to the DocuSign Member Console.

For More Information

For more information about additional DocuSign features, go to the DocuSign Support Site.

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If you have any comments or feedback on our documentation, please send them to us at: Documentation@DocuSign.com.

Summary of changes for this version:

- Updated DocuSign Customer Support contact information.