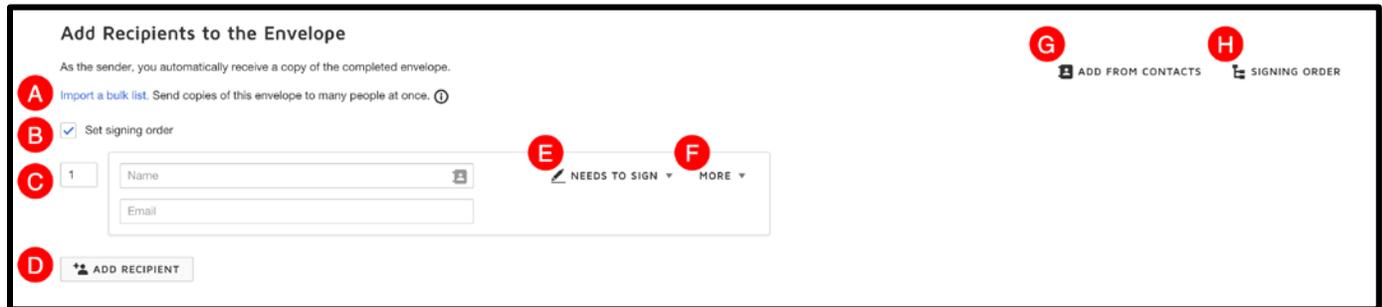


Adding Recipients

As the sender, you automatically receive a copy of the completed envelope. From the Adding Recipients to the Envelope section, you can **A)** Import a Bulk List, **B)** Choose whether or not to Set Signing order (checking or unchecking), **C)** Enter a Recipient, **D)** Add additional Recipients, **E)** Select who needs to sign, **F)** Select more options, **G)** Add from Contacts, and **H)** set Signing Order.



Add Recipients to the Envelope

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

A Import a bulk list. Send copies of this envelope to many people at once. ⓘ

B Set signing order

C 1 Name **E** **F** NEEDS TO SIGN MORE

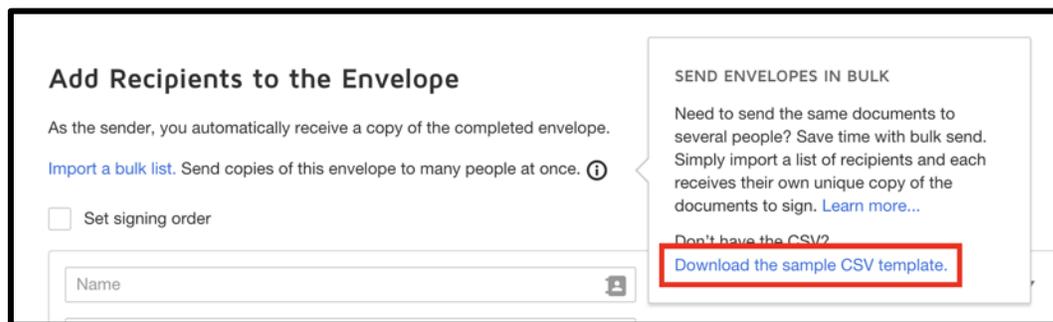
D

G **H**

Import a Bulk List - Bulk send from a template



1. Click on the  button.
2. Click **Download the sample CSV template.**



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

Name

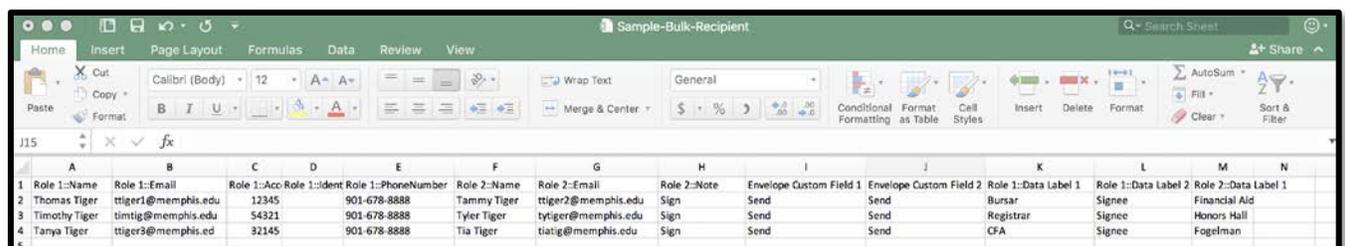
SEND ENVELOPES IN BULK

Need to send the same documents to several people? Save time with bulk send. Simply import a list of recipients and each receives their own unique copy of the documents to sign. [Learn more...](#)

Don't have the CSV?

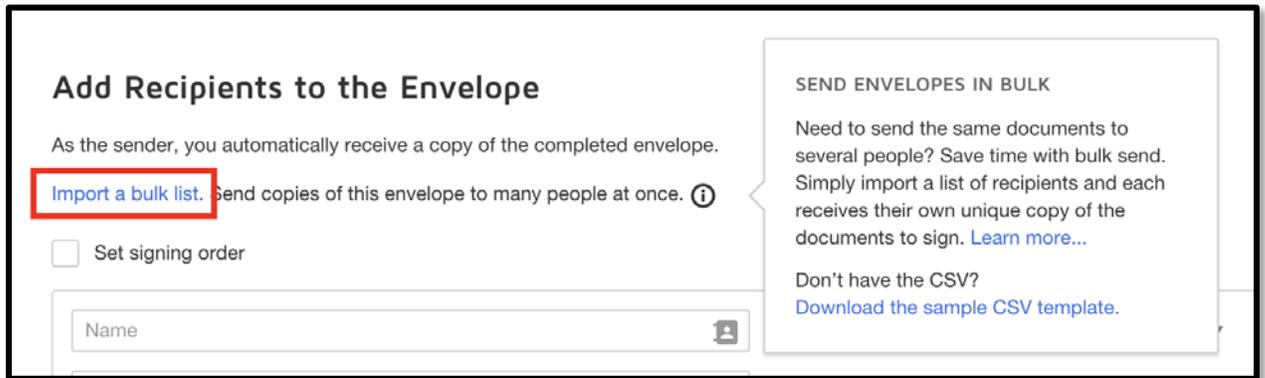
Download the sample CSV template.

3. This will provide you with an Excel spreadsheet to use as a CSV Template. Manually enter the necessary information (name, email, etc.) and save the file.
Note: No fields are required.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Role 1:-Name	Role 1:-Email	Role 1:-Acc	Role 1:-Ident	Role 1:-PhoneNumber	Role 2:-Name	Role 2:-Email	Role 2:-Note	Envelope Custom Field 1	Envelope Custom Field 2	Role 1:-Data Label 1	Role 1:-Data Label 2	Role 2:-Data Label 1	
2	Thomas Tiger	ttiger1@memphis.edu	12345	901-678-8888	Tammy Tiger	ttiger2@memphis.edu	Sign	Send	Send	Bursar	Signee	Financial Aid		
3	Timothy Tiger	tmtig@memphis.edu	54321	901-678-8888	Tyler Tiger	tytiger@memphis.edu	Sign	Send	Send	Registrar	Signee	Honors Hall		
4	Tanya Tiger	ttiger3@memphis.edu	32145	901-678-8888	Tia Tiger	tiafig@memphis.edu	Sign	Send	Send	CFA	Signee	Fogelman		

4. Click **Import Bulk List**.



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

Name

SEND ENVELOPES IN BULK

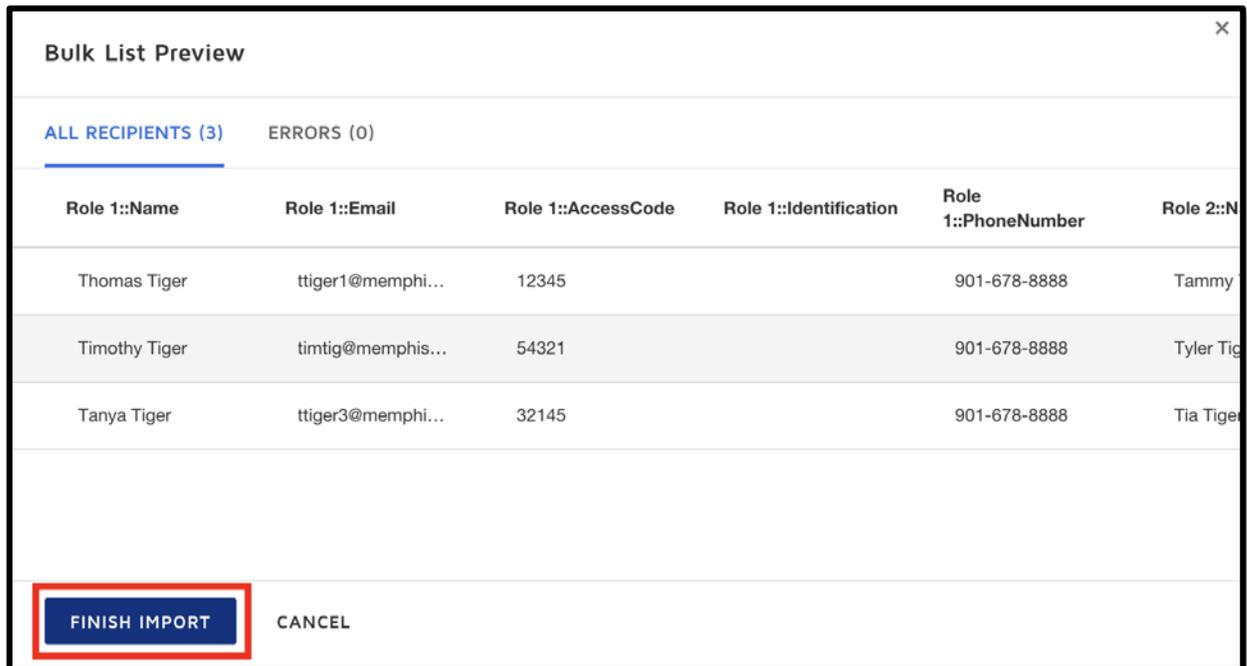
Need to send the same documents to several people? Save time with bulk send. Simply import a list of recipients and each receives their own unique copy of the documents to sign. [Learn more...](#)

Don't have the CSV?
[Download the sample CSV template.](#)

5. Browse to your CSV Template. Click to upload.

6. Click **Finish Import**.

Note: This will also tell you the number of recipients as well as number of errors in the Bulk List CSV Template upload.



Bulk List Preview [X]

ALL RECIPIENTS (3) ERRORS (0)

Role 1::Name	Role 1::Email	Role 1::AccessCode	Role 1::Identification	Role 1::PhoneNumber	Role 2::Name
Thomas Tiger	ttiger1@memphi...	12345		901-678-8888	Tammy
Timothy Tiger	timtig@memphis...	54321		901-678-8888	Tyler Tig
Tanya Tiger	ttiger3@memphi...	32145		901-678-8888	Tia Tig

FINISH IMPORT CANCEL

Note About Limits: Your bulk list can contain up to 1000 rows of data: one row for the header and up to 999 recipient rows.

Adding Recipients to an Envelope (Individually)

Now select who will sign the document. This can be your signature and/or someone else's.

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 [Name] [Email] [NEEDS TO SIGN] [MORE]

2 [Name] [Email] [NEEDS TO SIGN] [MORE]

ADD RECIPIENT

ADD FROM CONTACTS SIGNING ORDER

1. Add recipients:

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 [Name] [Email] [NEEDS TO SIGN] [MORE]

2 [Name] [Email] [NEEDS TO SIGN] [MORE]

ADD RECIPIENT

ADD FROM CONTACTS SIGNING ORDER

- Click on add recipients. Enter the email and name for recipient. From the drop-down menu, select who needs to sign
- Select the order in which the signatures should be signed by clicking Set Signing Order.



- You may also add from your contacts. Place a check by all the recipients you wish to send to from your contacts within the DocuSign System.

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. ⓘ

ADD FROM CONTACTS
SIGNING ORDER

Set signing order

1

✍ NEEDS TO SIGN
⌵ MORE

2

✍ NEEDS TO SIGN
⌵ MORE

+ ADD RECIPIENT

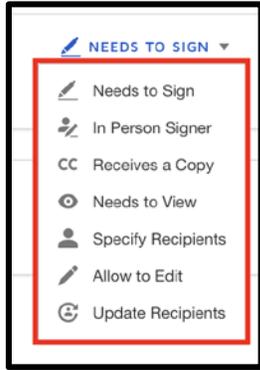
Select Contacts

BROWSE
SELECTED (0)

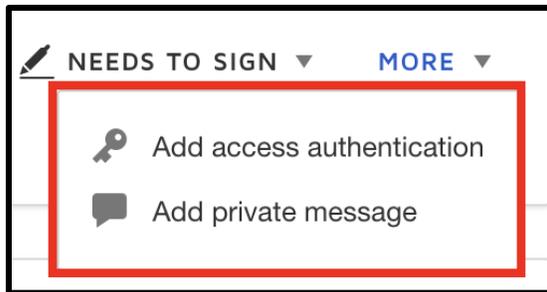
	Name	Email	Company
<input type="checkbox"/>		@memphis.edu	
<input type="checkbox"/>	UOM PIP	Signing Group	University of Memphis (Univ...
<input type="checkbox"/>	UOM Signing Group Test	Signing Group	University of Memphis (Univ...
<input type="checkbox"/>	UOM Terndelete AcadInnov	Signing Group	University of Memphis (Univ...
<input type="checkbox"/>	UOM Terndelete Bursar	Signing Group	University of Memphis (Univ...
<input type="checkbox"/>	UOM Terndelete FinAid	Signing Group	University of Memphis (Univ...
<input type="checkbox"/>	UOM Terndelete GradSchool	Signing Group	University of Memphis (Univ...
<input type="checkbox"/>	UOM Terndelete RegAnalysis	Signing Group	University of Memphis (Univ...
<input type="checkbox"/>	UOM Terndelete Registrar	Signing Group	University of Memphis (Univ...

ADD SELECTED
CANCEL

3. Under **Needs to Sign** there is a drop-down menu. From here you can choose how a person is to sign the document.

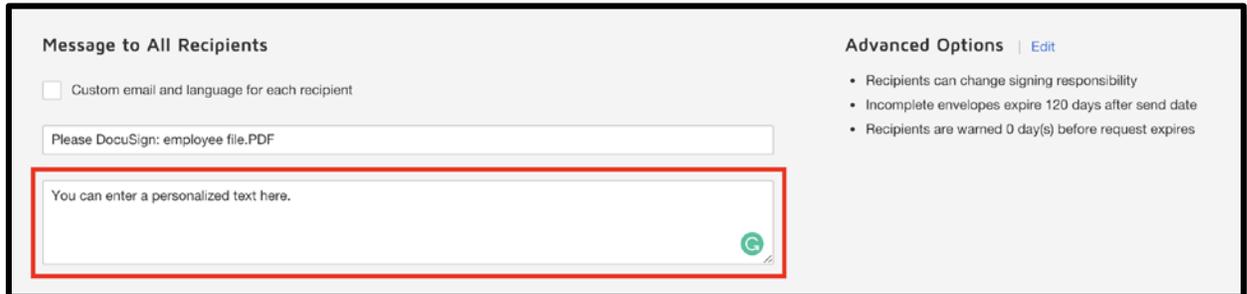


Under **More** there is an additional drop-down menu. From here you can add User Authentication and/or a private message.



Sending Message to Recipients

1. Just below **Add Recipients to the Envelope**, you will see **Message to All Recipients**. Enter your personalized message.



Message to All Recipients

Custom email and language for each recipient

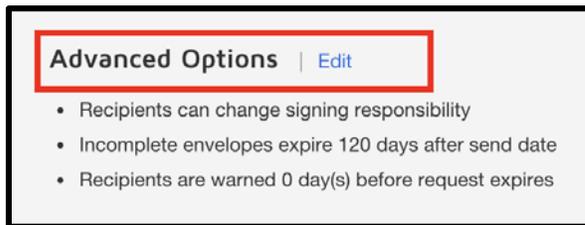
Please DocuSign: employee file.PDF

You can enter a personalized text here.

Advanced Options | [Edit](#)

- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires

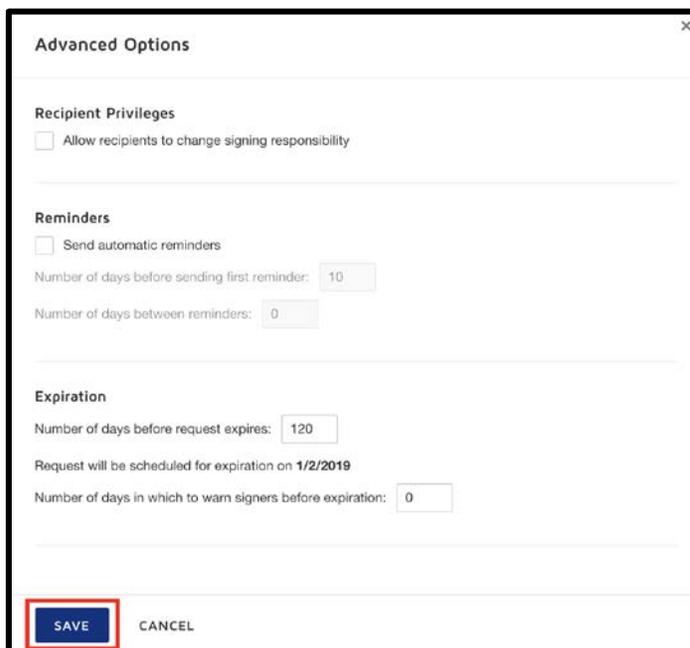
2. Click **Edit** by **Advanced Options** to view the advanced options.



Advanced Options | [Edit](#)

- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires

3. You will see the following options under **Advanced Options**. You can give **Recipient Privileges**, **Set Reminders**, and **Set the Expiration Date**. Once you have decided the options, click **Save**.



Advanced Options

Recipient Privileges

Allow recipients to change signing responsibility

Reminders

Send automatic reminders

Number of days before sending first reminder: 10

Number of days between reminders: 0

Expiration

Number of days before request expires: 120

Request will be scheduled for expiration on 1/2/2019

Number of days in which to warn signers before expiration: 0

SAVE CANCEL

4. At the top of the window you can choose what **A)** Actions to take from the drop-down menu or **B)** click **Next** to continue.

