

# Bulk Import Contacts

## Bulk Import Contacts

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### Overview

- When you send envelopes, you can use saved contacts to automatically populate recipient information.
- You can add personal contacts to your address book one at a time or if you have many contacts to add, you can use the bulk import contacts feature.
- You can add up to 500 contacts at a time with the bulk import contacts feature.

### How to View Contacts

- Go to the DocuSign homepage, click on your initials and go to **My Preferences**.
- In the left-hand menu, under **Account**, select **Contacts**. You're in the contacts view.
- Click **Bulk Import** to open the import contacts page.
- Click **Download Sample** to download the sample CSV file.
- You can use the sample file as an example of how to format your own CSV file or to collect your contacts to import.

### How to Format Contacts File

- Use the sample CSV file and enter the contact information. If you already have a list of contacts you want to import you can format your list to match the columns shown in the sample file.
- When preparing your bulk import CSV file, your contact information must be formatted to the rules below:
  1. Name and Email columns are required.
  2. The Shared column is required to indicate whether to share contacts with other account users.
  3. Phone Number columns must be formatted as **Text** in the file.
  4. Saved phone numbers cannot be used for recipient identity verification options i.e. Phone Call and Knowledge-Based.
  5. Fax column is not used for the MIT DocuSign account.
  6. Your columns can be in any order.

#### Contacts File Information

Field	Note
Full Name	Required field. Enter the contact's name as you expect them to sign the document with.
Email	Required field. Enter the email address to send notifications for the contact to view and sign documents. If the contact has a DocuSign account that you know of, use their account email address in order for your documents to arrive at their DocuSign account. Recipients do not need an account to sign documents.
Company	Optional field.
Mobile/Home/Work/Other Phone	Optional fields. Non-US numbers must include a leading "+" for country code, example: +42 7 872 0517. US numbers require the 10-digit number without the country code, example: 202.555.1234. Phone numbers should be entered as: 2025551234. <b>Note:</b> Saved phone numbers cannot be used for recipient identity verification options i.e. Phone Call and Knowledge-Based. <b>Note:</b> Fax is not used for the MIT DocuSign account. <b>Note:</b> Numbers are checked against an international phone number database for validity.

Shared	Required field. Specifies whether the contact is shared with other account users. Each contact must have a value of either <b>TRUE</b> or <b>FALSE</b> .
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## How to Upload Contacts

- In the contacts view, click **Bulk Import** and upload your bulk import contacts CSV file.
- Click **Review** to review your contacts to check for formatting errors. If there are formatting issues, select the **Errors** tab.
- Correct each error or delete the contact row from the import.
- Once all errors are corrected, click **Finish Import**.
- Contacts are imported to your personal address book.
- Depending on the number of contacts you're uploading, the import process may take a few minutes to complete.
- The ability to do another bulk import is disabled until the active import completes.

## See Also

- [MIT DocuSign Landing Page](#)