Using Bulk Send

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Overview

- Bulk Send allows you to send one document to multiple people at the same time.
- Eliminate the need to create and send separate envelopes.
- Create a CSV file with the contact information of everyone who needs to receive a copy of the document. Upload and send the file in DocuSign.
- Everyone in the CSV file will receive their own copy of the document to sign and return.

Bulk Send Permission

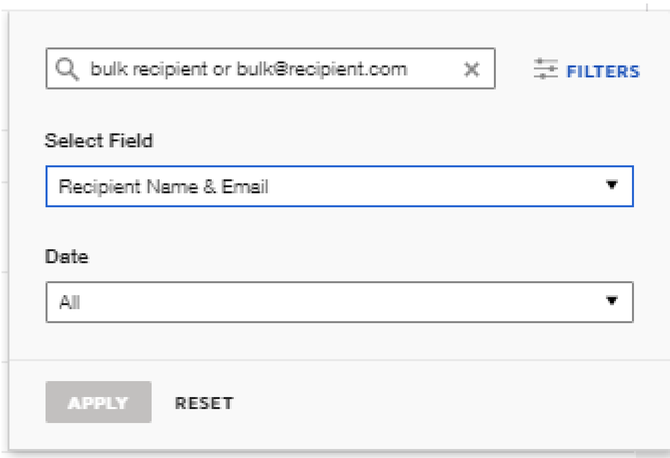
- You will need to have bulk send permission to use the feature in DocuSign.
- You must provide a business case/reason to use bulk send.
- To request bulk send access, please contact the MIT DocuSign administrator ovalenti@mit.edu or the IS&T Service Desk.

How to Determine if a Bulk Recipient Template is Using the Old Bulk Send (V1)

1. Search **My Templates** by using the following search criteria:

- Search By: **bulk recipient** or **bulk@recipient.com**
- Select Field: **Recipient Name & Email**
- Date: **All**

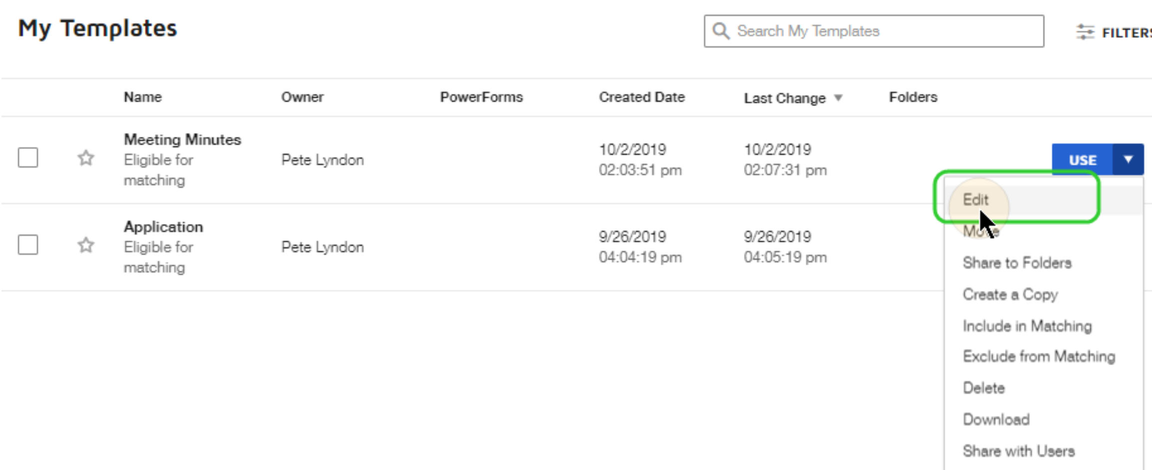
2. If there are templates found using the recipient name of **bulk recipient** or recipient email of **bulk@recipient.com**, then these templates are using the old bulk send.
3. Convert each old bulk send template to use the new bulk send.



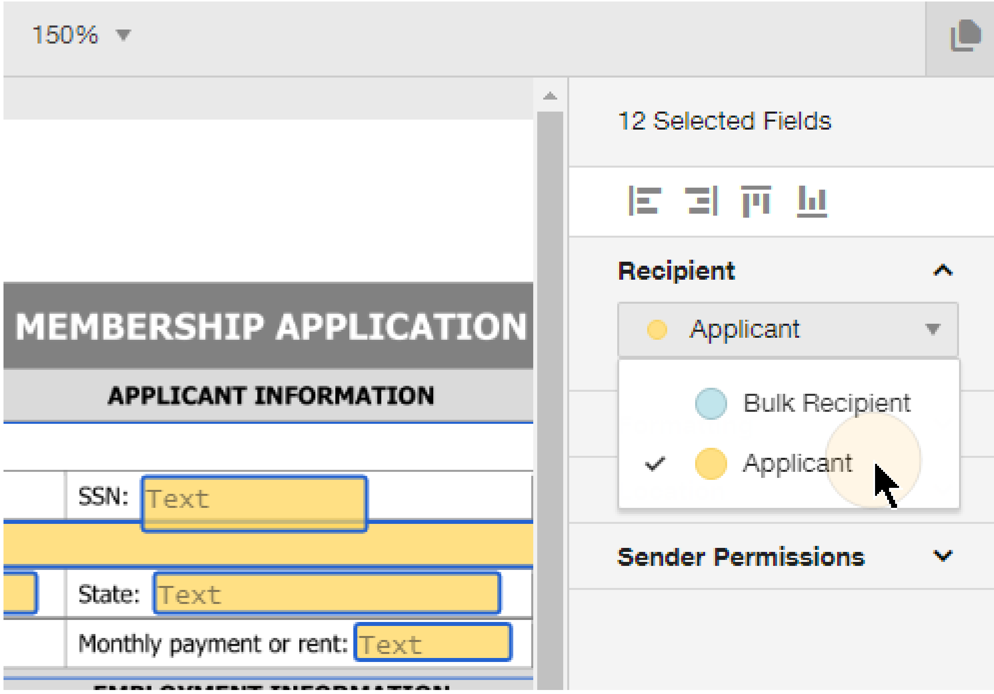
How to Convert a Bulk Recipient Template to the New Bulk Send (V2)

1. Navigate to **My Templates**.
2. Locate the template you want to convert.
3. Click the template actions menu and select **Edit**.

Note: You can create a test copy of your template to test the conversion. Select **Create a Copy** for your template. Add the word **Test** for your copied template name.

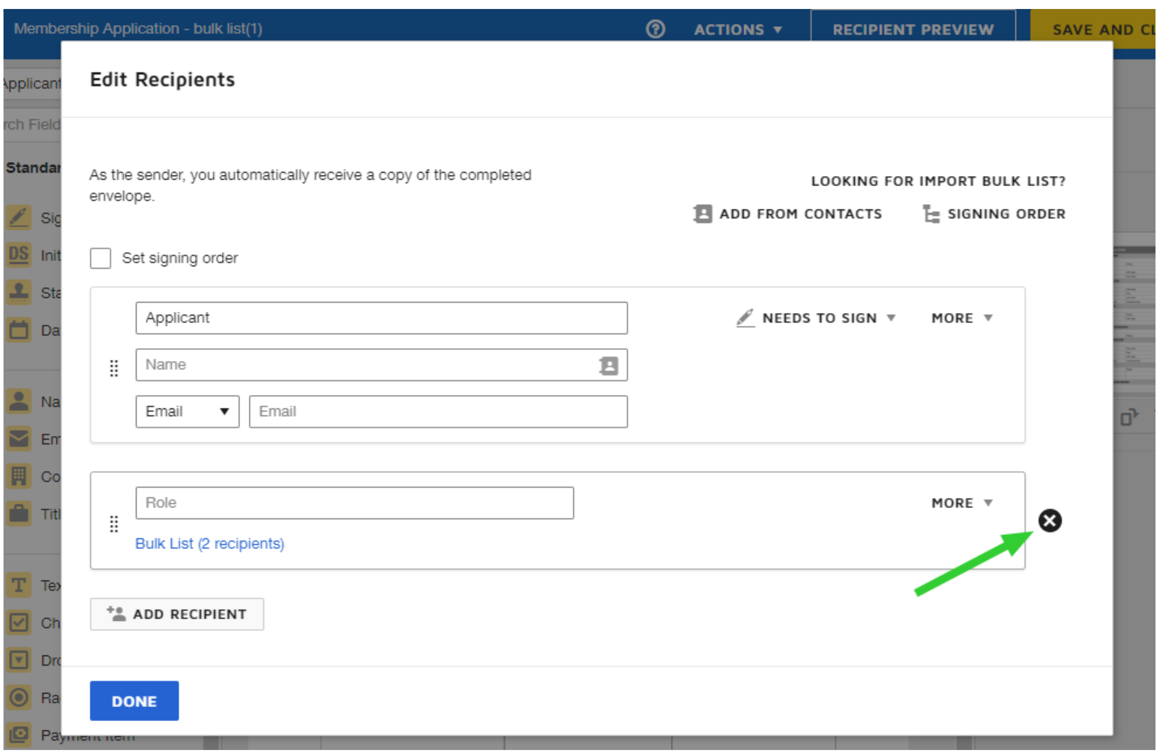


4. In the Add Recipients section, click **Add Recipient**.
    - Give the new recipient a role name.
    - Set the signing order to match that of the existing bulk recipient.
5. Click **Next** and the add fields screen should appear.
6. On the add fields screen, select all of the fields assigned to the bulk recipient.
    - If the bulk recipient is the only recipient on the template, press **CTRL + A** to select all of the assigned fields.
    - If there are multiple recipients, you will have to manually locate and select all of the bulk recipient's fields using **SHIFT + Click**.
7. With the bulk recipient's fields selected, on the properties panel on the right, click the recipient dropdown and select the new recipient you added.
8. The bulk recipient's fields are now reassigned to the new recipient.
    - Check a few of the field properties to ensure they were reassigned correctly. Such as formatting, list values, data/group labels or any conditional logic looks correct.



9. Delete the old bulk recipient.

- Click **Actions** in the top banner and select **Edit Recipients**.
- Click the **X** to the right of the old bulk recipient.



10. Click **Done**.
11. Click **Save And Close**.
12. Your template is converted and ready to use the new bulk send.

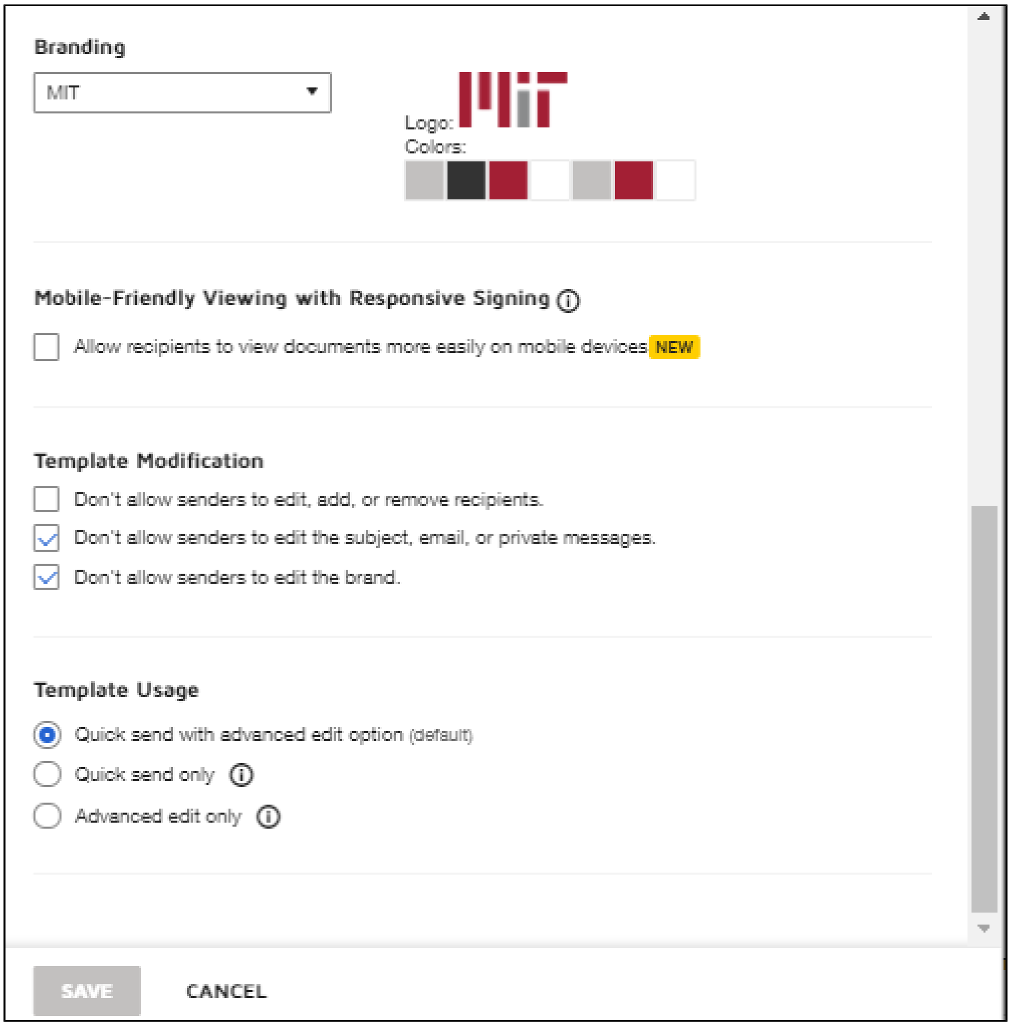
Note: If you're using a test template and the conversion went fine, no issues found. You can apply the changes to your live template.

How to Use the New Bulk Send (V2)

Key information and features about the new bulk send.

Template Requirements for Bulk Send

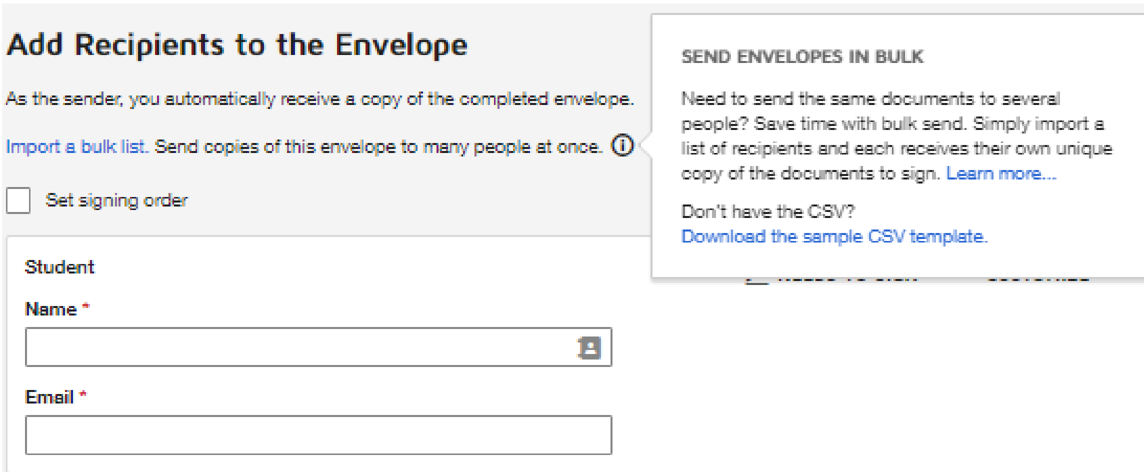
- Your template should have a role recipient with an action type selected. The supported recipient types for bulk send are: ***Needs to Sign***, ***Receives a Copy***, ***Needs to View***, ***Specify Recipients*** and ***Update Recipients***.
- Your template has a document uploaded.
- In **Advanced Options**, go to the **Template Modification** section and make sure option ***"Don't allow senders to edit, add, or remove recipients"*** is unchecked. Click save for any changes made.
- In the template, the envelope custom field (ECF) is required for entry.
- Assign DocuSign fields in your template.
- Each DocuSign field must have a data or group label. The data or group label of a field can be found in edit mode of the template where the DocuSign fields are assigned. Click on the field for your recipient role and look at the field properties to enter a data or group label.
- For the data labels and group labels, do not use commas (",") or periods ("."). These punctuation marks will cause errors when generating a CSV file and when importing a bulk recipient list.
- Save your template updates.



Generate a Customized Bulk Recipient CSV File

The new bulk send allows you to generate a customized CSV file that shows the data from the template that needs to be completed. Follow the steps below to generate a customized bulk recipient CSV file.

1. Click the **Use** button for your template.
2. Click **Advanced Edit** to access the envelope screen.
3. In the Add Recipients to the Envelope section, find the link to ***Import a bulk list*** and hover over the icon to open a tooltip.



4. Click the ***Download the sample CSV template*** link to generate a CSV file that is customized to the envelope.
5. Locate **Actions** in the top right of the screen and click **Discard**. This will cancel the envelope draft.

Prepare Your Bulk Recipient CSV File

You prepare a bulk recipient comma-separated values (CSV) file with the recipient and envelope information for your template. Also, the file can contain additional columns with customized information to be populated in your documents for each bulk send recipient.

- Your generated CSV file will display in the format of: **Recipient Role::Field** pair for each recipient role on the envelope.
- The envelope custom field (ECF) will not have a recipient role assigned as its related to the envelope, not to a recipient.
- **Name**, **Email** and the **Envelope Custom Field (ECF)** is required for the file.
- Text fields with data validation are not included when you generate the CSV file. This is not supported for bulk send.
- Do not use commas (",") or periods (".") in your bulk recipient list. This will cause errors when importing the file.
- Remove the columns that are not needed.
- Fill in the column data as required.
- If a column needs to be added to the file enter format as **Recipient Role::Field Data/Group Label**.
  Note: The data or group label of a field can be found in the edit mode of the template where the DocuSign fields are assigned. Click on the field for your recipient role and look at the field properties and find the data or group label. If label is blank, enter a description and save your template.
- Recipient data can be prefilled in your document by adding the field value to the CSV file.
- **To prefill recipient fields with data, enter the data in the CSV file as follows**:
  - Text or Note field: Enter the text.
  - **Note**: Text fields with data validation is not supported for bulk send.
  - Drop Down field: Enter a valid value from the field's specified list of options.
  - Checkbox field: Enter a capital "X".
  - Radio field: Enter a valid value from the list of radio button values.
  - Recipient Authentication Information: Insert a column and enter the format with a value. Example: Student::Access Code - ?12345

- When your updates are complete, save the CSV file.

Bulk Send from a Template

Your template and CSV file is complete. You're ready to send your bulk recipient list.

- Make sure to test bulk send with a small group of test recipients before using to send your actual list.
- You cannot undo bulk sends done in error.
- Your bulk list can contain up to 1000 rows of data. One row for the header and up to 999 recipient rows.
- Its recommended for bulk lists with more than **500 recipients** to be sent in batches. This is to avoid system performance issues.
- A separate envelope is sent for each entry in your bulk list.
- The envelopes will appear in your Sent folder.
- **Follow the steps to send your bulk recipient list:**

1. Click the **Use** button for your template.

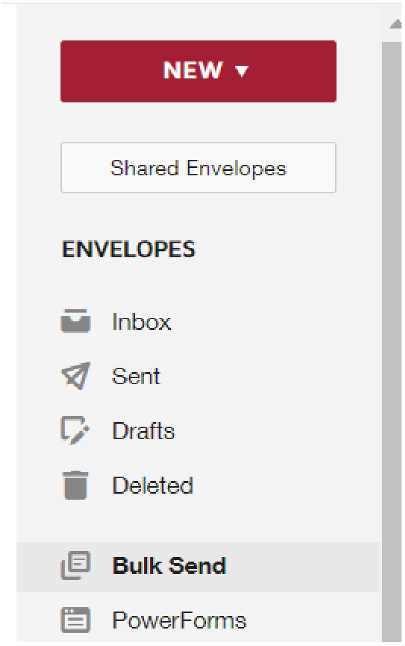
2. Click **Advanced Edit** to access the envelope screen.

3. In the Add Recipients to the Envelope section, click on the link to ***Import a bulk list*** and upload your bulk recipient list.
Note: A message may appear about bulk send matching exceptions. This message will display if fields have been removed from the original file. If errors are found, correct the errors in the CSV file. Then upload your file again and If everything looks fine, click **Accept**.

4. Click the **Send Now** button in the bottom right of the screen. Your envelopes are sent.

Bulk Send Management

- In the **Manage** tab, under **Envelopes** there is a **Bulk Send** section.
- You can track and manage your bulk send batch and envelopes within a batch.
- See key information about your batch and envelope like the number of envelopes successfully sent and the number failed.
- Use the search function to find a bulk send batch by Name or ID. Also, you can search for envelopes in a bulk send batch.

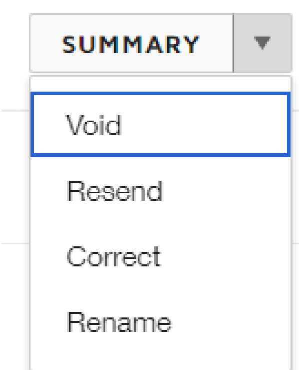


Bulk Send Batch Actions

- You can apply certain actions to an entire batch instead of manually selecting each envelope within that batch.
- Using batch actions can save time and reduce the risk of errors.
- **Bulk send batch actions can do the following:**

1. Void - Void envelopes in a batch.
2. Correct - Add or change the envelope expiration date.
3. Correct - Add or change the reminder date.
4. Resend - Resend the envelopes.
5. Rename - Change the batch name.

- To use a batch action, go to your batch and click the dropdown arrow on **Summary**. Then select the bulk send batch action.



Additional Information

- Bulk Send (V2) DocuSign Documentation

See Also

- MIT DocuSign Landing Page