Creating a Template

Overview

This guide provides information on creating a new template. 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 signer attachments.

The general steps in creating a new template are:

• add Template Summary information
• add document(s) for the template
• add the recipient roles for the template a template message
• place tags in the template
• preview and save the template.

Before creating a template, DocuSign recommends that you plan the information needed and the layout of your template.

Important: Some features, such as Templates, are only supported in certain DocuSign plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Service (service@docusign.com) for assistance.

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 DocuSign Service User Guide.

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Starting a New Template

Note: The options and screens shown in your browser might be different from those shown in this guide depending on your account type and options. If you have questions about the options available for your account, contact your Account Manager. For more information on different options, refer to the DocuSign Service User Guide or Console online help.

Creating a new template is similar to creating a new envelope. The main change is that you can add recipient roles in addition to actual recipients. A template can contain multiple documents, which can have multiple pages, and can be sent to several recipients.

IMPORTANT: When creating 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 will populate with the same data when a recipient enters or modifies information in the tag for all documents in the template. If the account setting is Document, only DocuSign tags with the same Label and in the same document will populate with the same data when a recipient enters or modifies information in the tag.

1. Click the down arrow on the Create button and select Template.

Alternately, you can click Actions and select New Template.

The Prepare Template page is displayed.
2. Type the name for your template in the **Template Name** field.

![Template Summary](image)

3. Optionally, type a description of the template in the **Description** field.

4. Optionally, you can also set password security so that only users that know the password can use the template.

Select the **Password protected** check box, the New Password dialog appears. Type the password in the **New Password** field, retype the password in the **Verify Password**, and then click **Save**.

5. Optionally, you can share the template with groups or other account members. To share a template:

- Click the **Groups** tab. Select the groups that will have access to the template. Click **Select All** to select all the groups in the list. All templates are automatically shared with the Administrators group.
- Click the **Members** tab. Select the members that will have access to the template. Click **Select All** to select all the members in the list.

**Note:** Due to the way Group and Member template access is tracked, Members that are part of a selected Group are not shown as selected when viewing the Members tab.

6. Go to the Documents for Signature section to add documents to the template.

### Adding Documents to a Template

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

1. Select the source of your document:

![Documents for Signature](image)

- **To upload documents from your computer:** click **Browse from my Computer**, the File Upload dialog box is displayed. Locate the file on your computer or network and click **Open**. The document is added to the template and a thumbnail image of the document is added to the section.
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- To upload an external document: click Choose an Online Document, the Add a Document dialog box is displayed. Select the location of the online document you want to upload on the left side of the dialog box. Select the document and then click Add. The document is added to the template and a thumbnail image of the document is added to the section.

![Add a Document Dialog Box]

**Note:** If you want to select a document from an external source, such as Box.Net or GoogleDocs, you might need to log on to the external document source.

2. Repeat Step 1 to add another document to the template.

3. 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.
   - Click Other Actions to replace the document.
   - If you have multiple documents in the template, you can 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.

4. After all documents are added, go to the Recipients section to add template roles and recipients.

### Adding Recipient Roles

In the Recipients and Routing section you add recipient roles and, optionally, set the routing order and add identification methods.

The routing order sets the order in which recipients receive and can act on documents in the envelope. Recipients with the same routing order receive and can act on envelopes at the same time (in parallel), while recipients with different routing orders receive and act on envelopes in sequential order.

If your account is enabled to send bulk recipient files, you can use bulk recipients in your template. See the Using the Bulk Recipient Feature quick start guide or DocuSign Service User Guide for more information about adding bulk recipients to a template.

1. Type the Recipient Role. Click Add Signer to add the role to the list with a Sign recipient Action or click Add CC to add the role to the list with a Receive a copy recipient Action.
If you know the information for the recipient role, type the name Email address and Name in the appropriate fields. As you type, the system will provide suggestions to auto-fill the fields based on entries in your Address Book.

**Note:** If your account is enabled to send bulk recipient files, you can use bulk recipients in your template. See the *Creating a Template with Bulk Recipients quick start guide* or *DocuSign Service User Guide* for more information about adding bulk recipients to a template.

2. **Recipient Actions:** After adding a recipient role, you can select the Action for the recipient, this sets the actions a recipient can perform. When you add a recipient by clicking **Add Signer**, the recipient Action is set to Sign. When you add a recipient by clicking **Add CC**, the recipient action is set to Receive a copy. An envelope must have at least one Signer or Acknowledge receipt recipient. The different recipient actions are described below:

- **Sign:** Use this action if your recipient must sign, initial, date or add data to form fields on the documents in the envelope.

- **Sign in person:** Use this action if the signer is in the same physical location as a DocuSign user who will act as a **Signing Host** for the transaction. The recipient added is the Signing Host and new separate **Signer Name** field appears after **Sign in person** is selected. Type the name of the signer in the Signer Name field. See Sending for In Person Signing in the *DocuSign Service User Guide* for more information about this recipient action.

- **Acknowledge receipt:** Use this action if the recipient must receive the completed documents for the envelope to be completed, but the recipient does not need to sign, initial, date or add information to any of the documents.

- **Receive a copy:** Use this action if the recipient should get a copy of the envelope, but the recipient does not need to sign, initial, date or add information to any of the documents. This type of recipient can be placed in any order in the recipient list. The recipient receives a copy of the envelope when the envelope reaches the recipient’s order in the process flow and when the envelope is completed.

- **Address recipients:** This recipient can add name and email information for recipients that appear after the recipient in workflow order. This recipient type is only available if the Send to Manage feature is enabled for the sender and document visibility is not enabled. See Agent Managed Envelopes in the *DocuSign Service User Guide* for more information about this recipient action.

- **Manage envelope:** This recipient has the same management and access rights for the envelope as the sender and can make changes to the envelope as if they were using the Advanced Correct feature. This recipient can add name and email information, add or change the routing order and set authentication options for the remaining recipients. Additionally, this recipient can edit signature/initial tabs and data fields for the remaining recipients. This recipient must have a DocuSign account and is only available if the Send to Manage feature is enabled for the sender. See Agent Managed Envelopes in the *DocuSign Service User Guide* for more information about this recipient action.
3. Identifying Recipients: Optionally, you can select how to Identify a recipient.

**Note:** In some cases, such as Phone Authentication, a sender might need to enter additional information for identifying a recipient.

Click on the **Identify** list to select the authentication options you want to use for the recipient.

![Identify](identify.png)

By default, Email identification is selected. Other options, Access Code, Phone Authentication, ID Check, Live ID and Social ID items can be selected for the recipient. The identification options available depend on your account settings. Each authentication option is described below:

**Note:** You can add Access Code authentication and one other authentication type for a single recipient.

- **Access Code:** The Access Code option requires your recipient to enter an access code before they can view the envelope.

![Access Code](access_code.png)

To enable access code security option, select the **Access Code** check box and type the access code into the field. The access code can include upper case or lower case letters, numbers, and special characters. You must provide this access code to your recipient. It is recommended that you provide the code over the phone or using some other secure method. There is no additional fee for using this authentication check.

- **Phone Authentication:** The Phone Authentication option asks the recipient to select or type a phone number to use for authentication and then they are presented with a validation code while the system places a call to the number. After answering the phone, the recipient is prompted to enter the validation code and speak their name. There is an additional fee for using this authentication check.

**Note:** Do not use the Phone Authentication if your recipient cannot connect to the Internet and use their telephone at the same time.
To enable Phone Authentication, select the - **Identity Check** - check box and then select **Phone authentication** from the list. The Phone Authentication information for the recipient appears. If the recipient name and email is not specified you can only select the **New Number** or **Recipient may provide** options.

**Important:** If phone authentication is selected and the system does not have a number to dial for the recipient (either by allowing the recipient to enter a number, or from the Address Book or by the entering a number), you cannot complete the sending process.

- Select phone numbers that the recipient can choose from for use during the authentication phone call. The phone numbers listed here are associated with the Address Book entry for the recipient. If the recipient does not have any phone numbers in the Address Book or is not in your Address Book, no numbers are shown.
- You can also select **New Number** to add a phone number for the recipient. Select the Country for the phone number, type the phone number and, if the number has an extension, type the extension number.
- Additionally, you can select **Recipient may provide** to allow the recipient to type their own phone number.

- **ID Check:** The ID Check option asks the recipient to provide some initial personal information (current address is required, but there is other optional information the recipient can enter) and then answer a set of questions before the recipient can view the envelope. The questions are based on data available in public records (such as where they have lived).

  The ID Check is a knowledge-based authentication provided by RSA. This service is often used by many banks to validate the ID of recipients.

  The ID Check option might not be useful for recipients outside the United States. There is an additional fee for using this authentication check.

**Note:** If you select ID Check for a recipient, then the recipient name you supply is the one used for the ID check.

To enable the ID Check option, select the - **Identity Check** - check box and then select **ID Check** from the list.
4. Set Sender actions: Optionally, you can set the actions the template sender cannot take with the recipient role.

- **Edit recipient**: This option locks the recipient information preventing the template sender from changing the information for this recipient role.
- **Delete recipient**: This option requires this recipient role to be part of any envelope sent with this template preventing the template sender from deleting this recipient role.

5. Repeat steps 1 through 4 to add additional recipient roles.

- 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.

**Live ID or Social ID Identity Check**: This option requires your recipient to enter their Live ID or Social ID (Salesforce, LinkedIn, Google, etc.) credentials before they can view the envelope.

To enable the Live ID or Social ID security option, select the - **Identity Check** - check box and then select **Live ID** or **Social ID** from the list.
You can remove a recipient by clicking the remove icon (×) associated with that recipient.

6. After all roles and recipients are added, go to the Email Subject section.

Adding Email Message Information and Envelope Settings

In the Email Message section you can customize the email subject and, optionally, the messages for recipients.

**Note:** The DocuSign service automatically adds a subject based on the documents you have added.

1. Type an Email Subject for the envelope. The subject is limited to 100 characters.
2. Optionally, type an Email Message for all recipients. The message is limited to 2000 characters.
3. 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.
4. Optionally, you can select the email language used for a recipient. This option sets the language used in the standard email format and initial signing view 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 Service (service@docusign.com) for assistance.
• Click *Customize email and signing language for each recipient* the Customize Email Language dialog box appears.

![Customize Email Language Dialog Box]

• 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.

5. Optionally, you can lock the email content (the Subject, Email Message and recipient Notes) of the template by selecting **Sender cannot edit Subject, Message, or Note**. This prevents senders from changing the content when they send an envelope with this template. When a sender uses a template with locked email content, they see the content, but cannot make any changes or additions to it.

   If the email content is locked and the template Subject is left blank, senders will be able to add a subject to the envelope.

   Locking the email content will also prevent users from making changes to the email content when correcting envelopes.

6. After the Email Message information is added, scroll down go to the Envelope Settings section.

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

**Note:** The options available in the Envelope Settings depend on your account type and settings.

This section provides information about the different options in the Envelope Settings section.
Branding Setting
If your account has Branding enabled and you have access to multiple brand profiles, you can select the account brand that is seen by recipients during viewing and signing. Additionally, you can prevent users from changing the brand profile used when sending an envelope with this template by selecting *Don't allow sender to change selected Brand*.

Recipient Information Settings
The following options might be available for your account:

- **Allow recipient(s) to sign on paper**: Select this option to allow signers to print and sign the document on paper instead of electronically. See *Allowing Your Recipients to Sign On Paper* for more information about this.

- **Allow recipient(s) to edit the document(s)**: Select this option to enable the Document Markup feature, which allows recipients to access the markup tool. The markup tool is used to cover up old text, cover text and add new text, or to add new text. Recipients that signed a document before the markup tool changes are made are given a new opportunity to review and approve the changes before any document is finalized. See *Using the Document Markup Feature* for more information about Document Markup.

- **Allow recipient(s) to change signing responsibility**: Select this option to allow the recipient to reassign the envelope to another person.
• **Turn on auto navigation:** Select this option to turn on auto navigation for the envelope. If this is not selected, there is no auto navigation in the envelope.

• **Must be a signer to view signed documents:** When this option is selected, recipients will only be able to see documents that have Signature or Initial tags assigned to them or that do not have any Signature or Initial tags.

**Reminders and Expirations Settings**
Optionally, you define rules to remind your recipients of their signing tasks and to expire your envelope if it is not signed.

**Sender Settings**
This section lets you select to stamp the envelope ID on the documents in the envelope and has the active Envelope Custom Fields for your account.

When you are done changing any Envelope Settings, click **Next** to begin tagging the documents.

**Adding Tags**

On the Add Tags page, you will add signature, initial and other information tags to help your signers know precisely what actions you want them to take, where in the document you want them to sign, initial or add information, and in what order.

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 Service User Guide* for more information about DocuSign tags.

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**Note:** When adding tags, you can open the properties for the tag and select **Required** or **Locked** to require or lock the tags. Locked tags cannot be removed when a sender opens the template.
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You can move to different pages in the document by scrolling through the document or by clicking on the appropriate page in the Page Guide shown on the right side of the console.

**Note:** If Document Visibility is enabled for your account, you can set the visibility options for the template. See the Document Visibility quick start guide or DocuSign Service User Guide for more information.

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 Saving the Template**

1. Optionally, you can preview how your recipient will see the tags by clicking **Continue**.
   
   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** to return to the Add Tags page.

2. When you have added all the needed tags and are done previewing the envelope, click **Save**.
   
   The template is saved and you are returned to the DocuSign console.

**Template Matching and Intelligent Document Recognition**

When a sender starts a new envelope and adds a document, template matching, also known as Intelligent Document Recognition (IDR), reviews the text and information in the document to determine if the document matches a saved template. If a match is found, the system will ask the sender if they want to apply the template to the document in the envelope.

**Note:** The IDR feature is only supported in DocuSign Standard and Enterprise plans. Your account may not support this option. To access this functionality, contact your Account Manager or DocuSign Service ([service@docusign.com](mailto:service@docusign.com)) for assistance.
IDR looks at the following factors to determine if there is a match between a document and a template:

- the number of pages in the template is equal to or less than the number of pages in the document,
- the first and last 25 words in the document are the same as the template or, if IDR region match boxes are used in a template, the words in document are the same as those in the IDR regions.

In the case where a template document has similar opening and closing text to many other documents used by a group, you can add an IDR region match box to the template to narrow down and improve the IDR selection process.

You can select any region of text within a document for IDR. There is no functional limit to the maximum or minimum volume of text you can select to define a match. However, the less text you select the more false positive matches IDR is likely to find and the more text you select, the longer it will take for the IDR matching process to finish.

**Setting Intelligent Document Recognition Regions**

1. Before saving a template, on the Tag toolbar click the IDR Regions button.
2. Place your cursor near the text you want to use and then left-click and drag the cursor over the portion of text to match when DocuSign applies IDR. A dashed line appears around the selected text.

   If the area selected is not the area you wanted:
   - To adjust the size of the region, place your cursor over the lower right corner of the region (the cursor turns into a double-headed arrow), click and drag the region to set the correct area.
   - To move the region, place your cursor over the region (the cursor turns into a four-headed arrow), left-click and drag the region to a new area.
   - To remove the region, place your cursor over the region (the cursor turns into a four-headed arrow), left-click and drag the region over the DocuSign Tags (the right side of the page) and release the mouse button.

3. Complete and save the template normally.

**For More Information**

For more information about additional DocuSign features, go to the DocuSign Support Site.
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Version: DocuSign Release (May 2013)

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:

- Added information about how to lock email content (email Subject, Message and recipient Notes) when creating a template.