

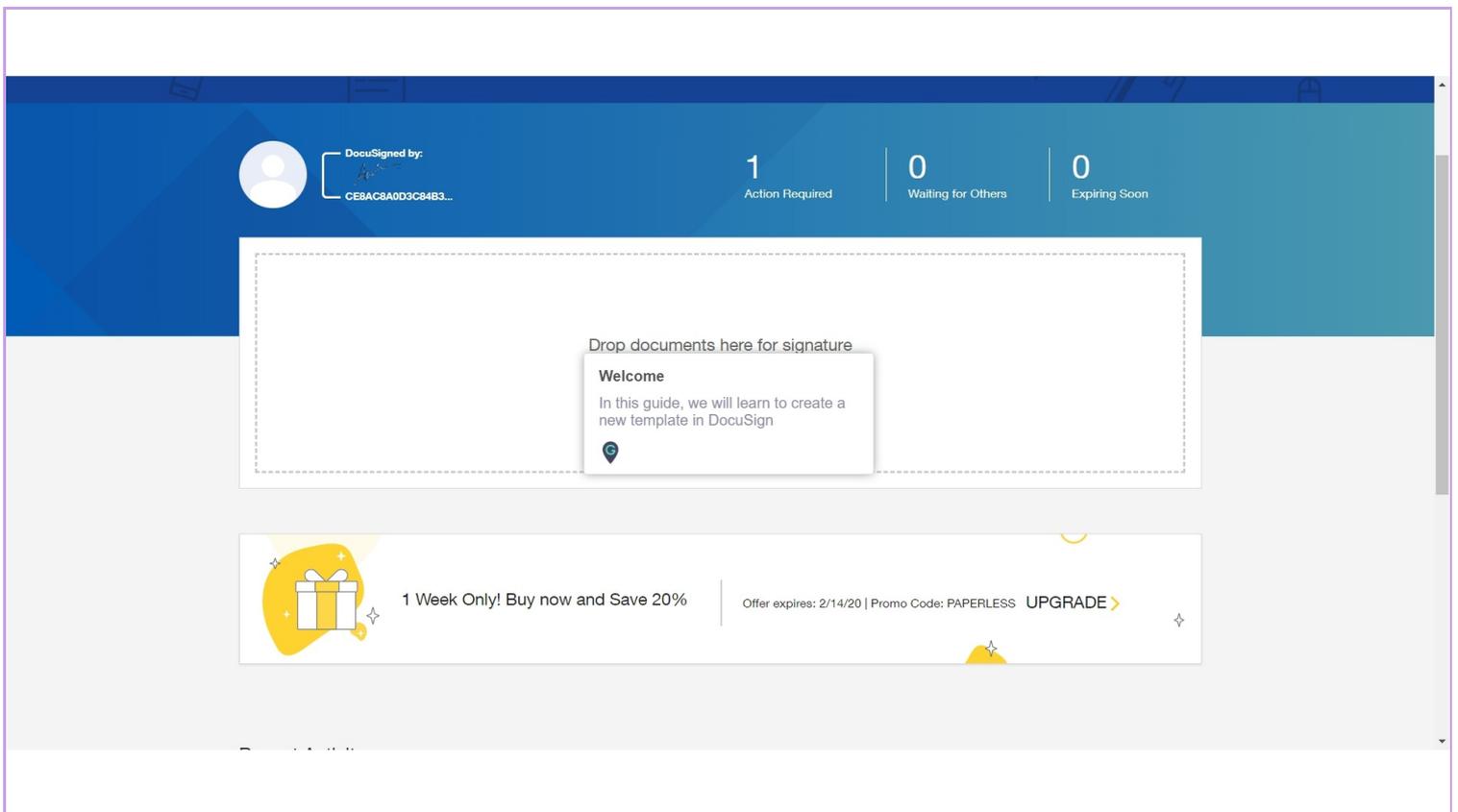


How to create a new template in DocuSign

Step: 01

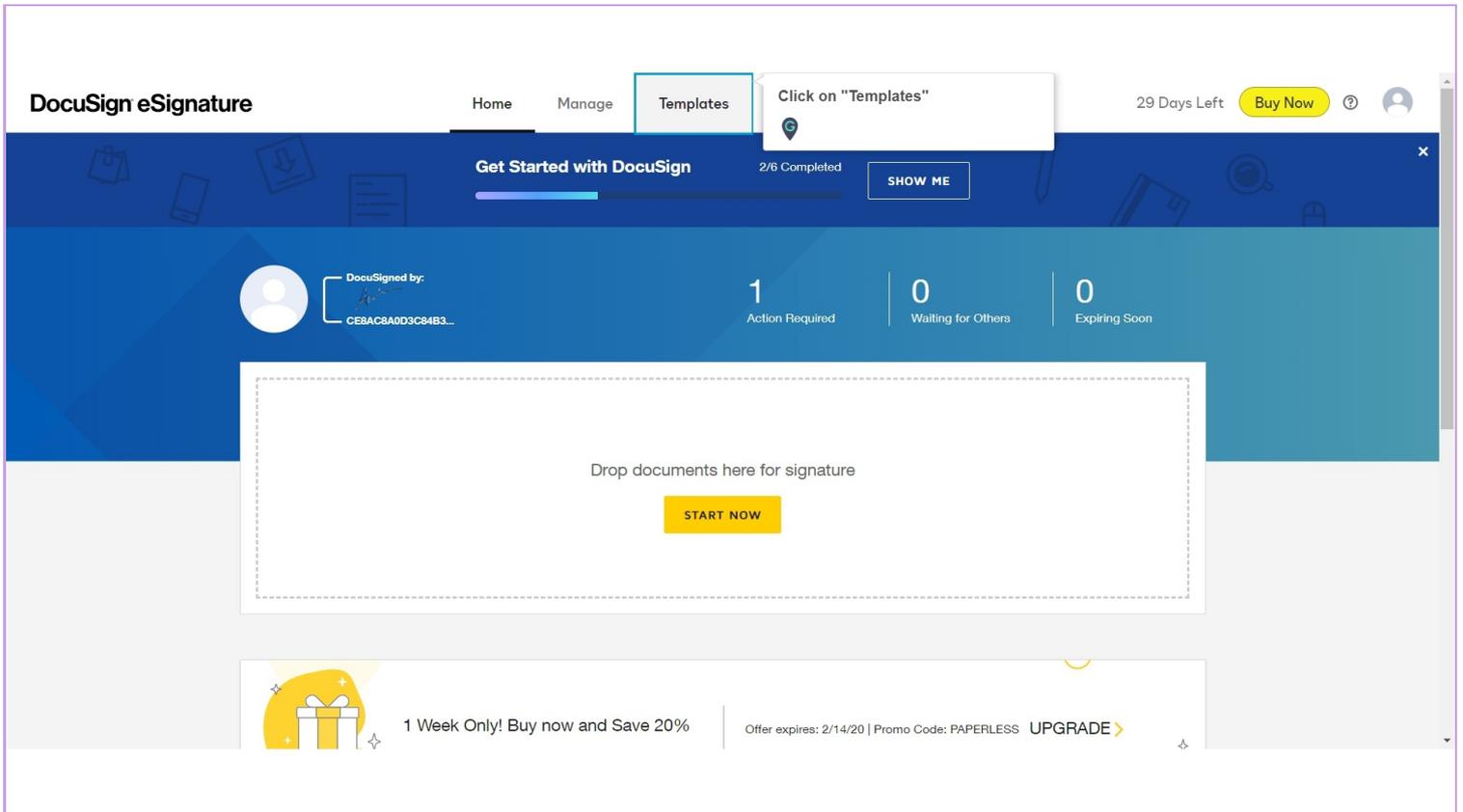
Welcome

In this guide, we will learn to create a new template in DocuSign



Step: 02

Click on "Templates"



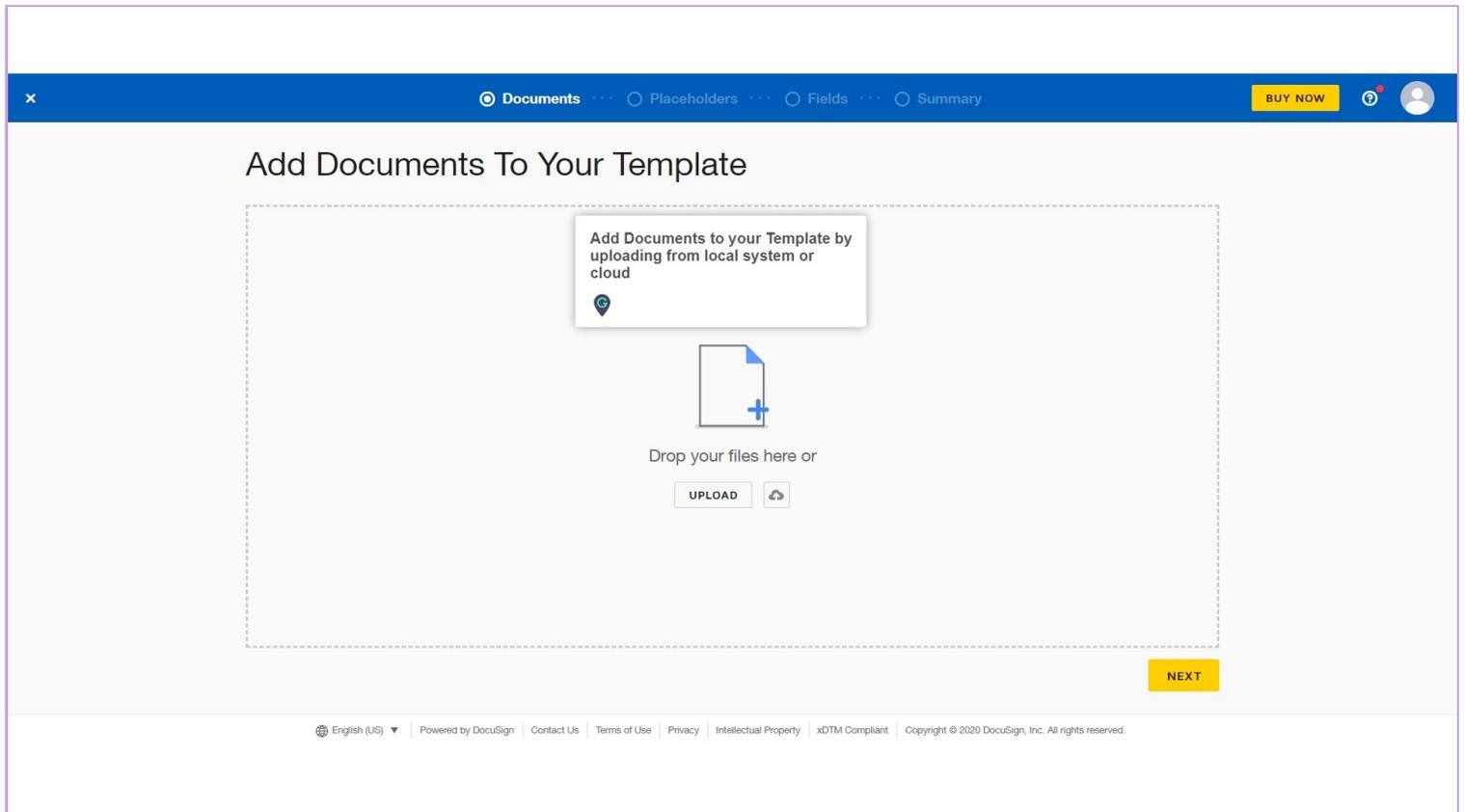
Step: 03

Click on "Create a Template"

The screenshot displays the DocuSign eSignature dashboard. At the top, the navigation bar includes 'Home', 'Manage', 'Templates', 'Reports', and 'Admin'. A 'Buy Now' button is visible in the top right corner. Below the navigation bar, a blue banner reads 'Get Started with DocuSign' with a progress indicator showing '2/6 Completed' and a 'SHOW ME' button. The main content area features a section titled 'Resending the Same Envelopes?' with an illustration of a person holding a document. A yellow 'CREATE A TEMPLATE' button is highlighted, and a white callout box with a location pin icon points to it, containing the text 'Click on "Create a Template"'. Below this, there is a section 'Save a recent envelope as a template' with two entries: one for 'Please DocuSign: 16-08-2019-5d5...' and another for '[Untitled]'. Each entry has a 'SAVE AS TEMPLATE' button. The footer contains language settings, 'Powered by DocuSign', and various legal links.

Step: 04

Add Documents to your Template by uploading from local system or cloud



The screenshot shows the DocuSign interface for adding documents to a template. The top navigation bar includes a close button (x), a breadcrumb trail (Documents > Placeholders > Fields > Summary), a 'BUY NOW' button, and a user profile icon. The main heading is 'Add Documents To Your Template'. A central dashed box contains a callout box with the text 'Add Documents to your Template by uploading from local system or cloud' and a location pin icon. Below this is a file icon with a plus sign and the text 'Drop your files here or'. There are two buttons: 'UPLOAD' and a cloud icon. A yellow 'NEXT' button is located at the bottom right of the dashed box. The footer contains a language dropdown (English (US)), 'Powered by DocuSign', and various legal links (Contact Us, Terms of Use, Privacy, Intellectual Property, xDTM Compliant), along with a copyright notice for 2020 DocuSign, Inc.

Step: 05

Click on "Next"

The screenshot displays the DocuSign interface for adding documents to a template. At the top, a blue navigation bar contains the text "Documents", "Placeholders", "Fields", and "Summary", along with a "BUY NOW" button and a user profile icon. The main heading is "Add Documents To Your Template". Below this, a document card shows "224x86.png" with "1 page". A dashed box below the card contains the text "Drop your files here or" followed by an "UPLOAD" button and a file icon. A callout box with a location pin icon points to a yellow "NEXT" button. The footer includes a language selector set to "English (US)", "Powered by DocuSign", and various legal links: "Contact Us", "Terms of Use", "Privacy", "Intellectual Property", "xDTM Compliant", and "Copyright © 2020 DocuSign, Inc. All rights reserved."

Step: 06

For Placeholders, add recipients to represent each role or person who will sign your documents

Generally, these will be just roles like "Tenant", "Buyer", or "Client".
But if you have a specific individual who will sign or receive a copy of every envelope sent from this template, you can add their name

The screenshot shows the DocuSign interface for creating placeholder recipients. At the top, there is a blue navigation bar with 'Documents', 'Placeholders', 'Fields', and 'Summary' tabs. A 'BUY NOW' button and a user profile icon are on the right. The main heading is 'Create Placeholder Recipients'. On the left, a callout box contains the text: 'For Placeholders, add recipients to represent each role or person who will sign your documents. Generally, these will be just roles like "Tenant", "Buyer", or "Client". But if you have a specific individual who will sign or receive a copy of every envelope sent from this template, you can add their name'. The main area features a list of placeholders. The first placeholder is 'Placeholder 1 (e.g. Client, Buyer, HR)' with a text input field below it. To the right of the input field are 'NEEDS TO SIGN' and 'MORE' options. Below the list is an 'ADD PLACEHOLDER' button. At the bottom right are 'BACK' and 'NEXT' buttons. The footer contains language settings (English (US)), 'Powered by DocuSign', and various legal links (Contact Us, Terms of Use, Privacy, Intellectual Property, xDTM Compliant) and a copyright notice for 2020 DocuSign, Inc.

Step: 07

Click on "More"

The screenshot displays the 'Create Placeholder Recipients' interface in a web browser. The browser's address bar shows '224x86'. The top navigation bar includes 'Documents', 'Placeholders', 'Fields', and 'Summary', along with a 'BUY NOW' button and a user profile icon. The main heading is 'Create Placeholder Recipients'. Below the heading, there is a checkbox for 'Set signing order' and a 'View' link. The main form area contains a placeholder entry for 'Placeholder 1 (e.g. Client, Buyer, HR)' with a 'Client Name' input field. To the right of the input field is a 'NEEDS TO SIGN' dropdown menu and a 'MORE' button. A callout box with a location pin icon points to the 'MORE' button, containing the text 'Click on "More"'. Below the form is an 'ADD PLACEHOLDER' button. At the bottom of the form area are 'BACK' and 'NEXT' buttons. The footer contains the text: 'English (US) | Powered by DocuSign | Contact Us | Terms of Use | Privacy | Intellectual Property | xDTM Compliant | Copyright © 2020 DocuSign, Inc. All rights reserved.'

Step: 08

Click on "Add name and email"

The screenshot displays the 'Create Placeholder Recipients' interface in DocuSign. The top navigation bar includes 'Documents', 'Placeholders', 'Fields', and 'Summary' tabs, along with a 'BUY NOW' button and a user profile icon. The main content area is titled 'Create Placeholder Recipients' and features a 'Set signing order' checkbox and a 'View' link. A placeholder card for 'Placeholder 1 (e.g. Client, Buyer, HR)' is shown with a 'Client Name' input field. A dropdown menu is open, listing options: 'Add name and email', 'Add access authentication', 'Delete Recipient', and 'Advanced settings'. A callout box highlights the 'Add name and email' option with the text 'Click on "Add name and email"'. Below the placeholder card is an 'ADD PLACEHOLDER' button. A 'NEXT' button is visible to the right of the dropdown menu. The footer contains 'English (US)', 'Powered by DocuSign', and various legal links.

Step: 09

Enter Recipient Name

The screenshot displays the DocuSign interface for creating placeholder recipients. At the top, a blue navigation bar contains the document ID '224x86', a breadcrumb trail 'Documents > Placeholders > Fields > Summary', a 'BUY NOW' button, and a user profile icon. The main heading is 'Create Placeholder Recipients'. Below this, there is a checkbox for 'Set signing order' and a 'View' link. A list of placeholders is shown, with the first one titled 'Placeholder 1 (e.g. Client, Buyer, HR)' and containing the text 'Client Name'. To the right of this placeholder are icons for 'NEEDS TO SIGN' and 'MORE'. Below the placeholder list is a 'Recipient' section with 'Close' and 'Discard' options. This section contains a 'Name' field with a blue border and a location pin icon, and an 'Email' field. A modal dialog titled 'Enter Recipient Name' is overlaid on the 'Name' field, featuring a location pin icon. At the bottom left of the recipient section is an 'ADD PLACEHOLDER' button. At the bottom right are 'BACK' and 'NEXT' buttons. The footer contains a language dropdown set to 'English (US)', a 'Powered by DocuSign' logo, and various legal links: 'Contact Us', 'Terms of Use', 'Privacy', 'Intellectual Property', 'xDTM Compliant', and 'Copyright © 2020 DocuSign, Inc. All rights reserved.'

Step: 10

Enter Recipient Email

224x86 Documents Placeholders Fields Summary BUY NOW

Create Placeholder Recipients

Set signing order | View

Placeholder 1 (e.g. Client, Buyer, HR) NEEDS TO SIGN MORE

Client Name

Recipient: Close Discard

Name

Email

Enter Recipient Email

ADD PLACEHOLDER

BACK NEXT

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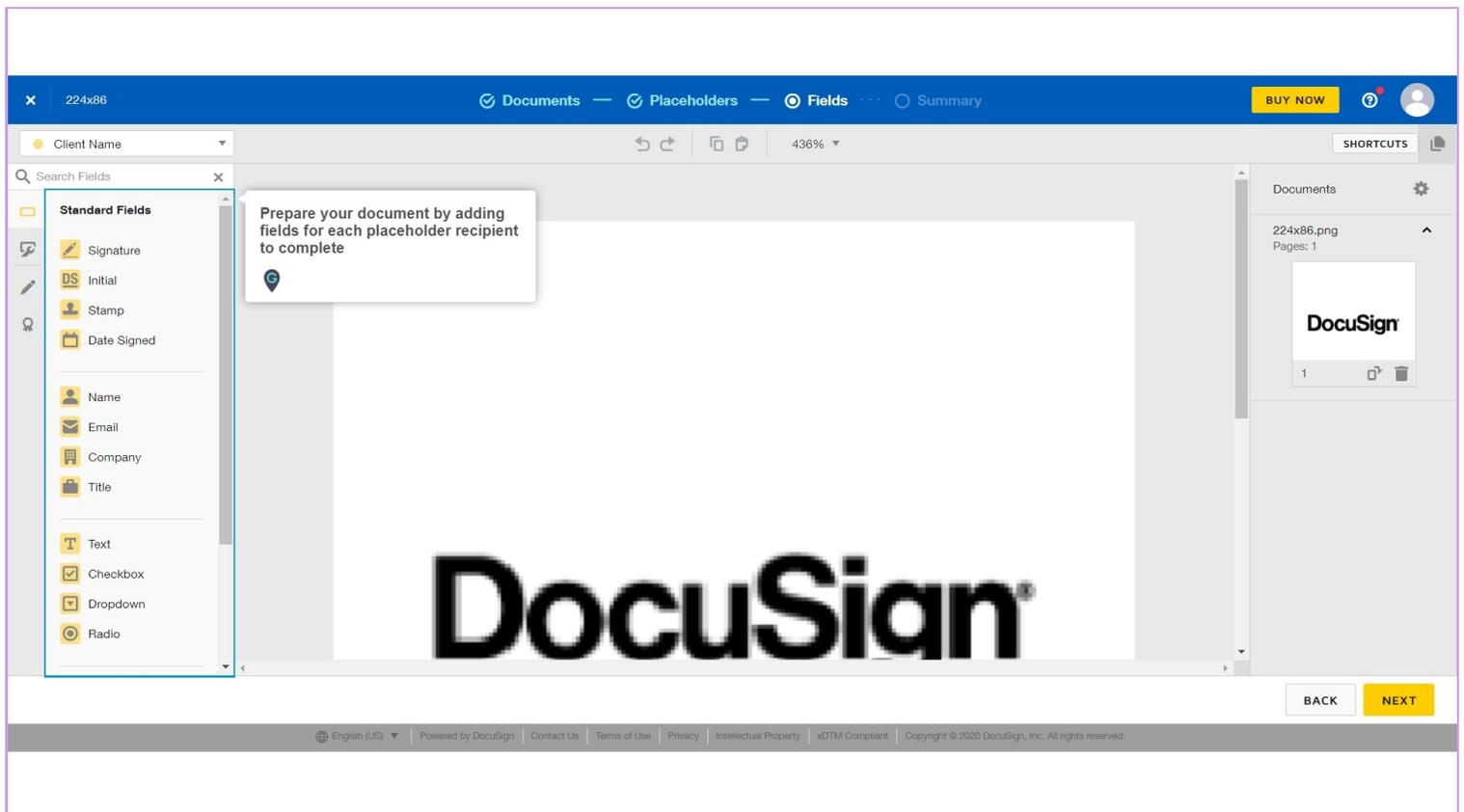
Step: 11

After adding all your placeholder recipients, click NEXT

The screenshot shows the 'Create Placeholder Recipients' interface in DocuSign. At the top, there is a blue navigation bar with 'Documents', 'Placeholders', 'Fields', and 'Summary' tabs. A 'BUY NOW' button and a user profile icon are also visible. The main content area is titled 'Create Placeholder Recipients' and includes a 'Set signing order' checkbox and a 'View' link. A placeholder card is shown with the title 'Placeholder 1 (e.g. Client, Buyer, HR)' and a 'Client Name' input field. Below this is a 'Recipient' section with 'Name' and 'Email' input fields. At the bottom of the card are 'Close' and 'Discard' buttons. An 'ADD PLACEHOLDER' button is located below the card. At the bottom right, there are 'BACK' and 'NEXT' buttons. A callout box with a location pin icon contains the text: 'After adding all your placeholder recipients, click NEXT'. The footer contains language settings (English (US)), 'Powered by DocuSign', and various legal links.

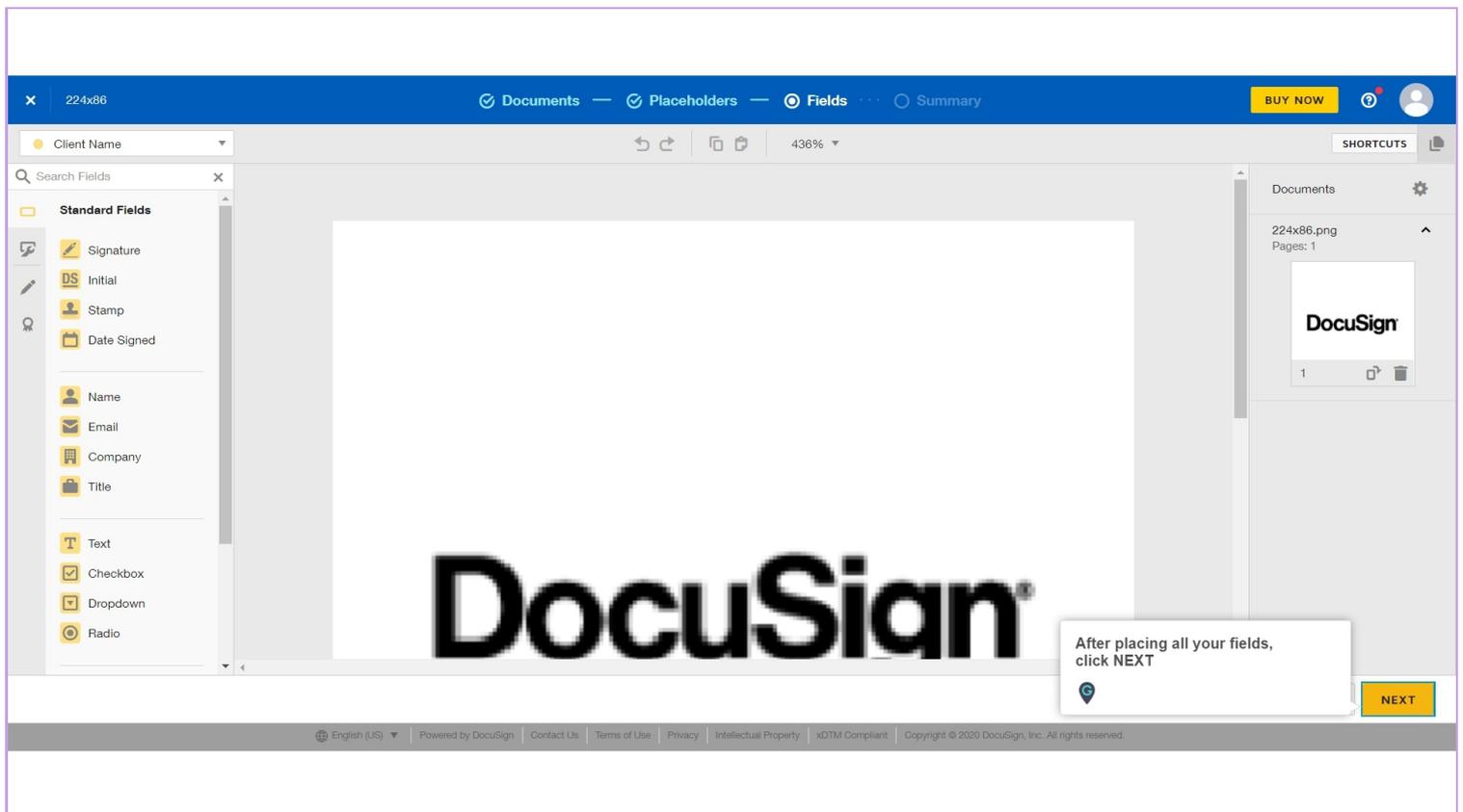
Step: 12

Prepare your document by adding fields for each placeholder recipient to complete



Step: 13

After placing all your fields, click NEXT



Step: 14

For Summary, review your template

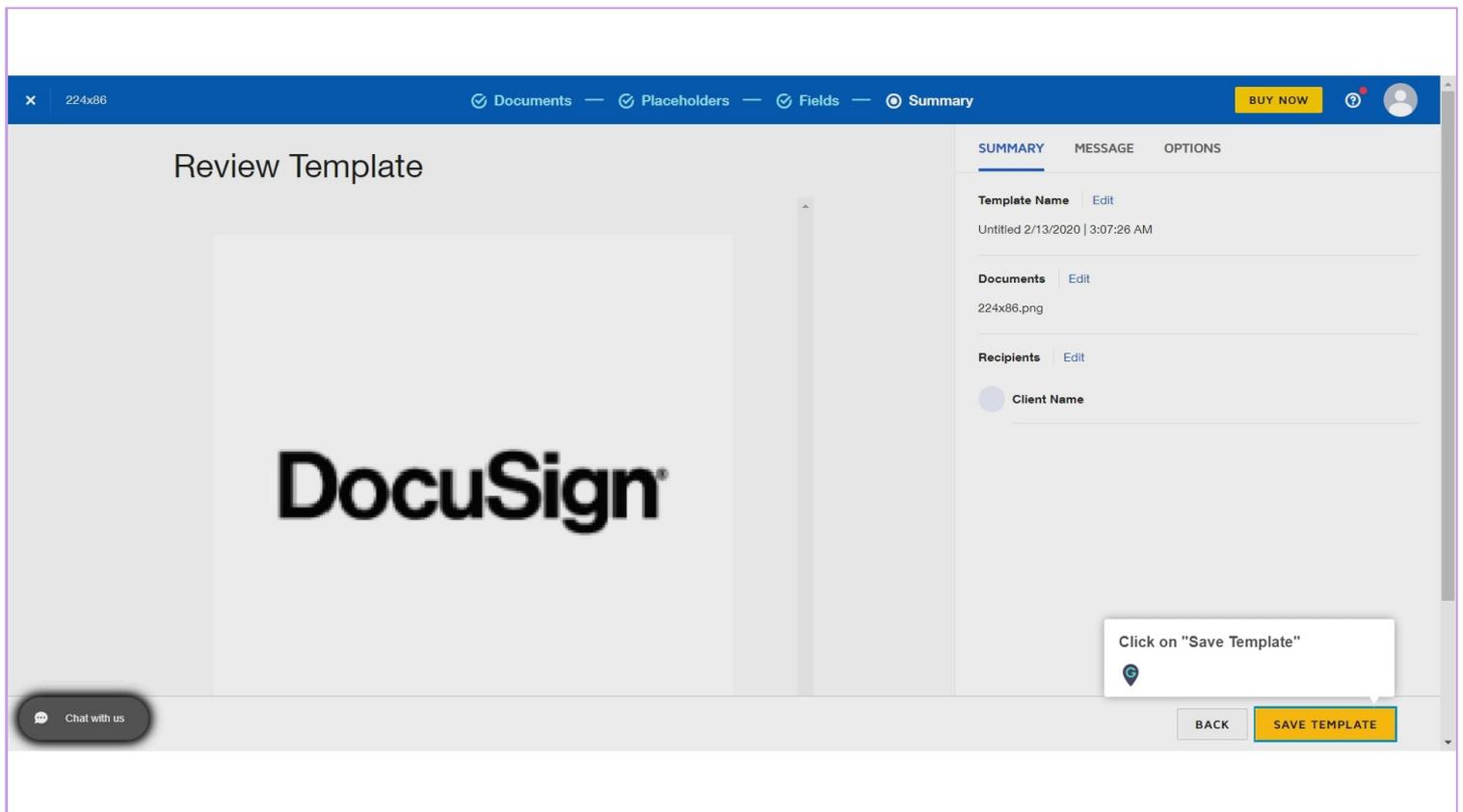
The screenshot displays the DocuSign 'Review Template' interface. The main content area features the DocuSign logo. A notification bubble in the upper right of the main area reads 'For Summary, review your template'. The right sidebar is titled 'SUMMARY' and includes the following sections:

- Template Name** | Edit: Untitled 2/13/2020 | 2:38:25 AM
- Documents** | Edit: 224x86.png
- Recipients** | Edit: Client Name

At the bottom right of the interface, there are two buttons: 'BACK' and 'SAVE TEMPLATE'.

Step: 15

Click on "Save Template"



Thank You!

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