How to create a new template in DocuSign

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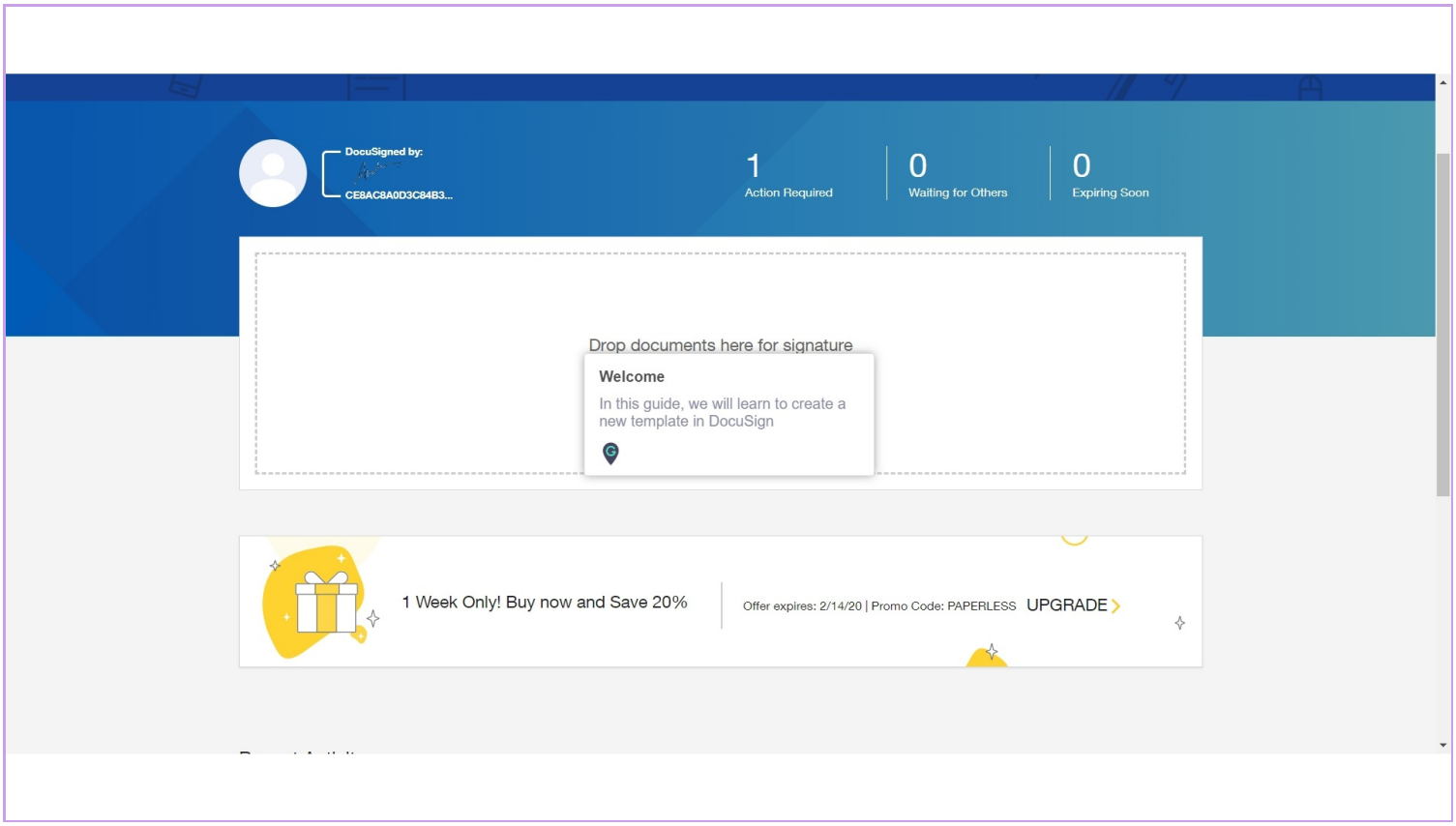
Step: 01

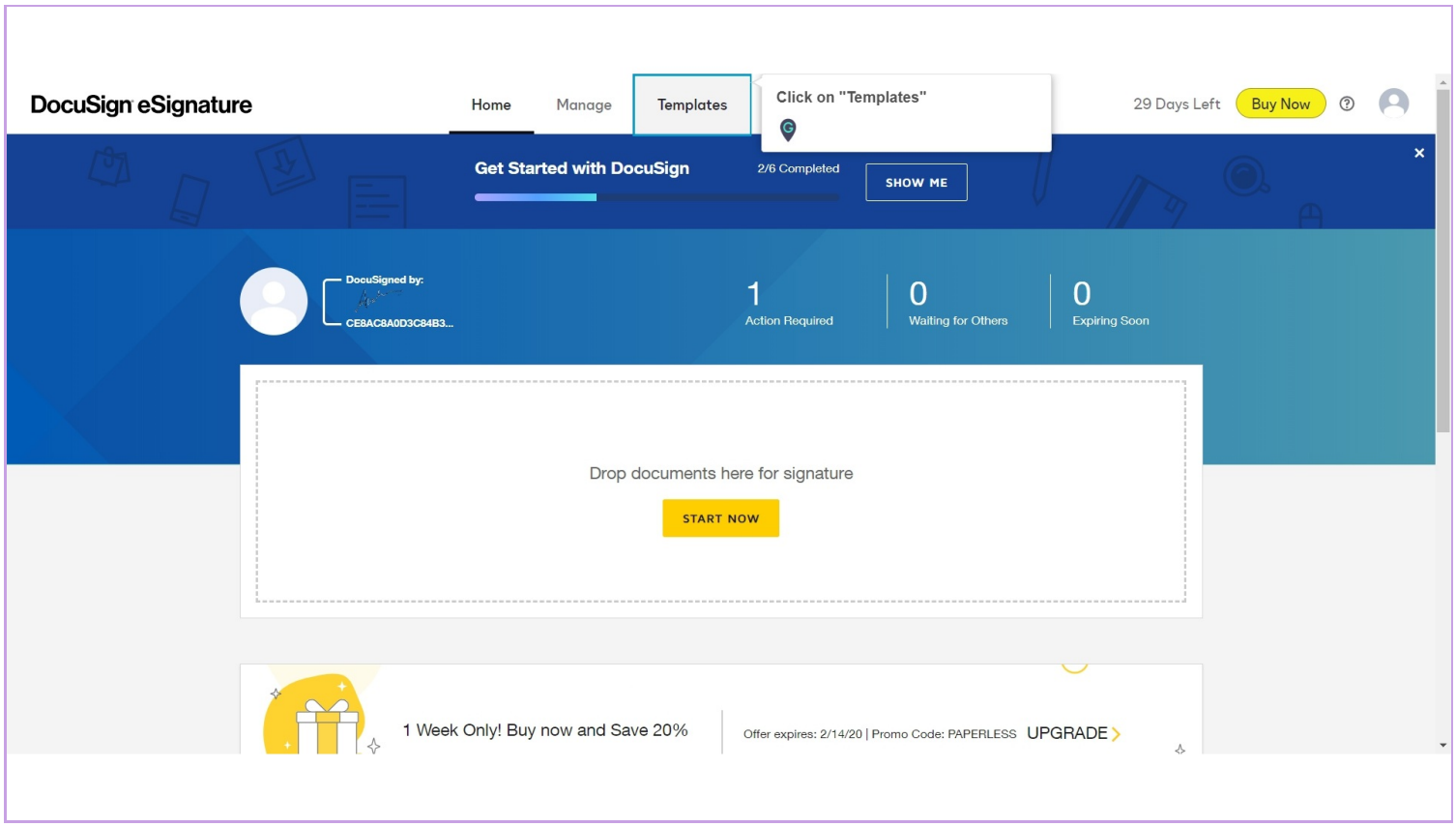
Welcome

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



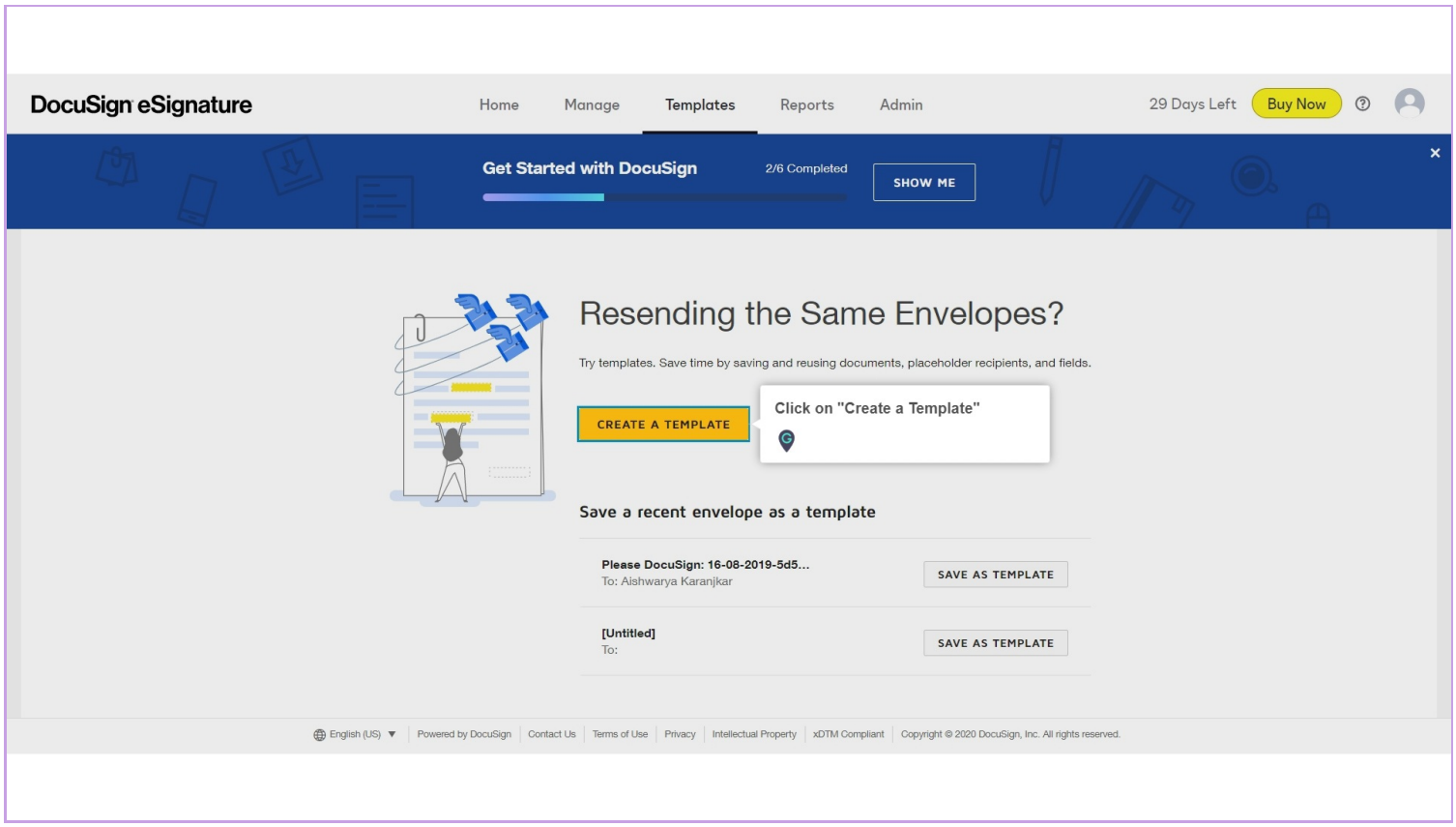
Step: 02

Click on "Templates"



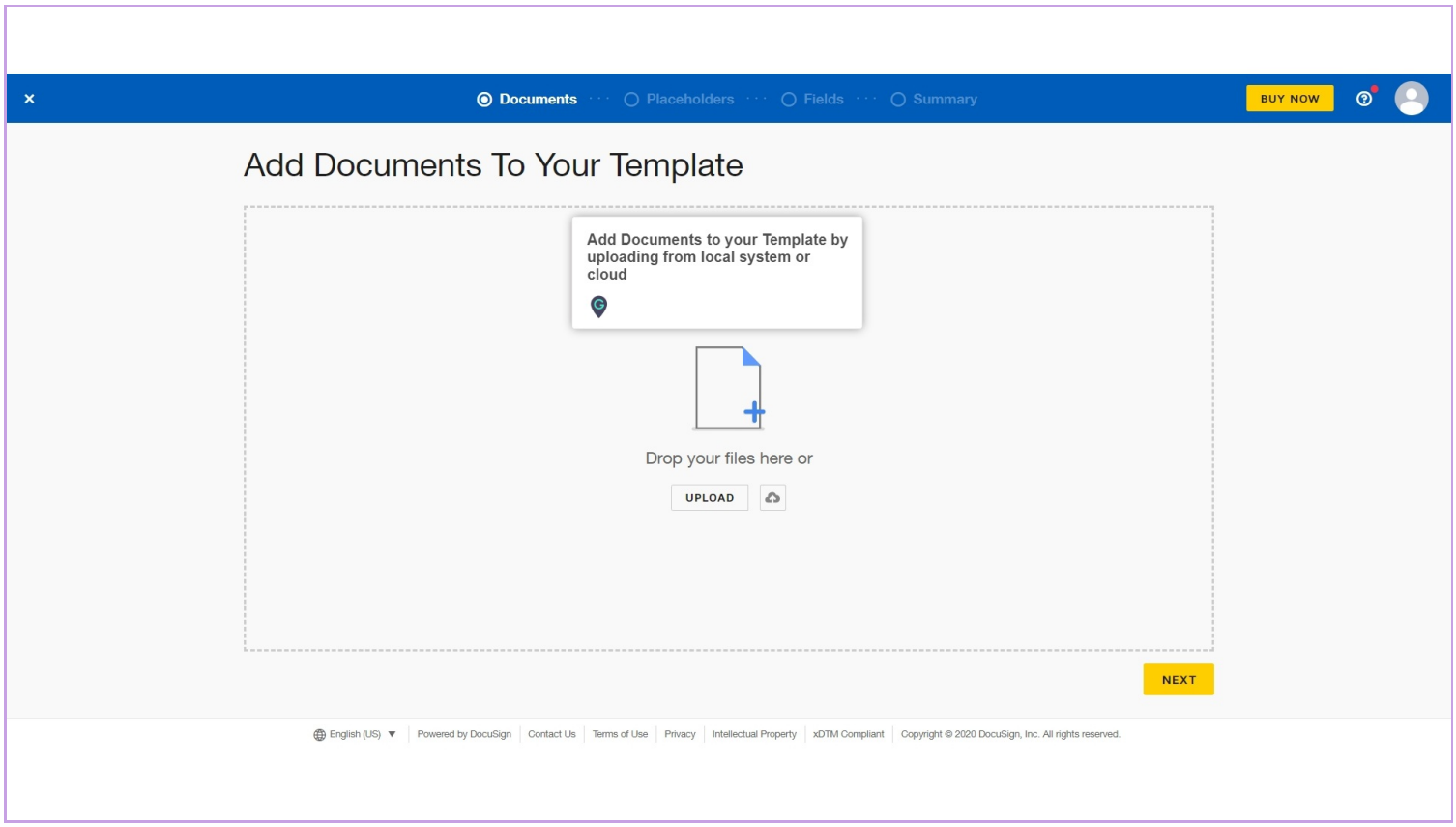
Step: 03

Click on "Create a Template"



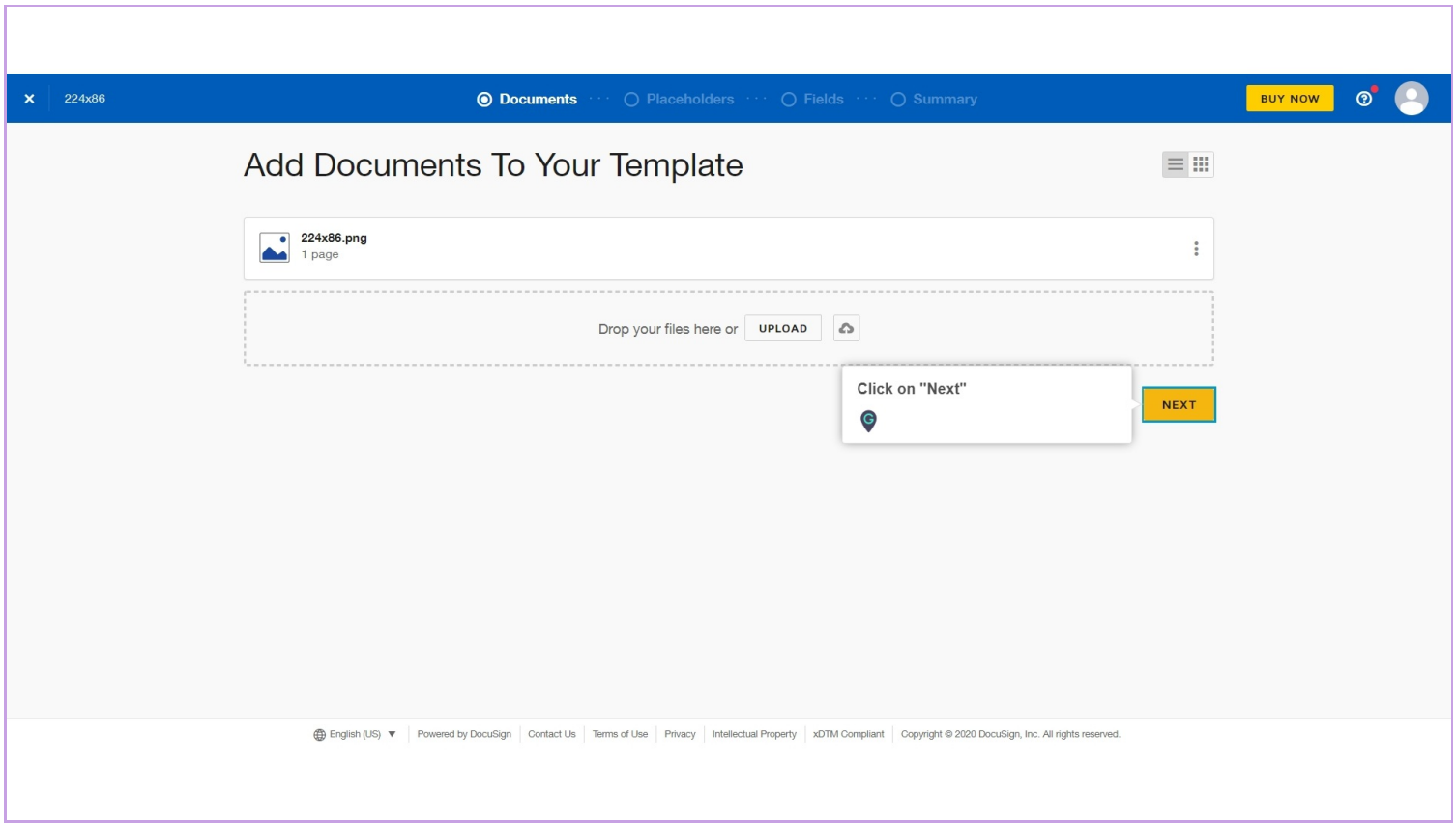
Step: 04

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



Step: 05

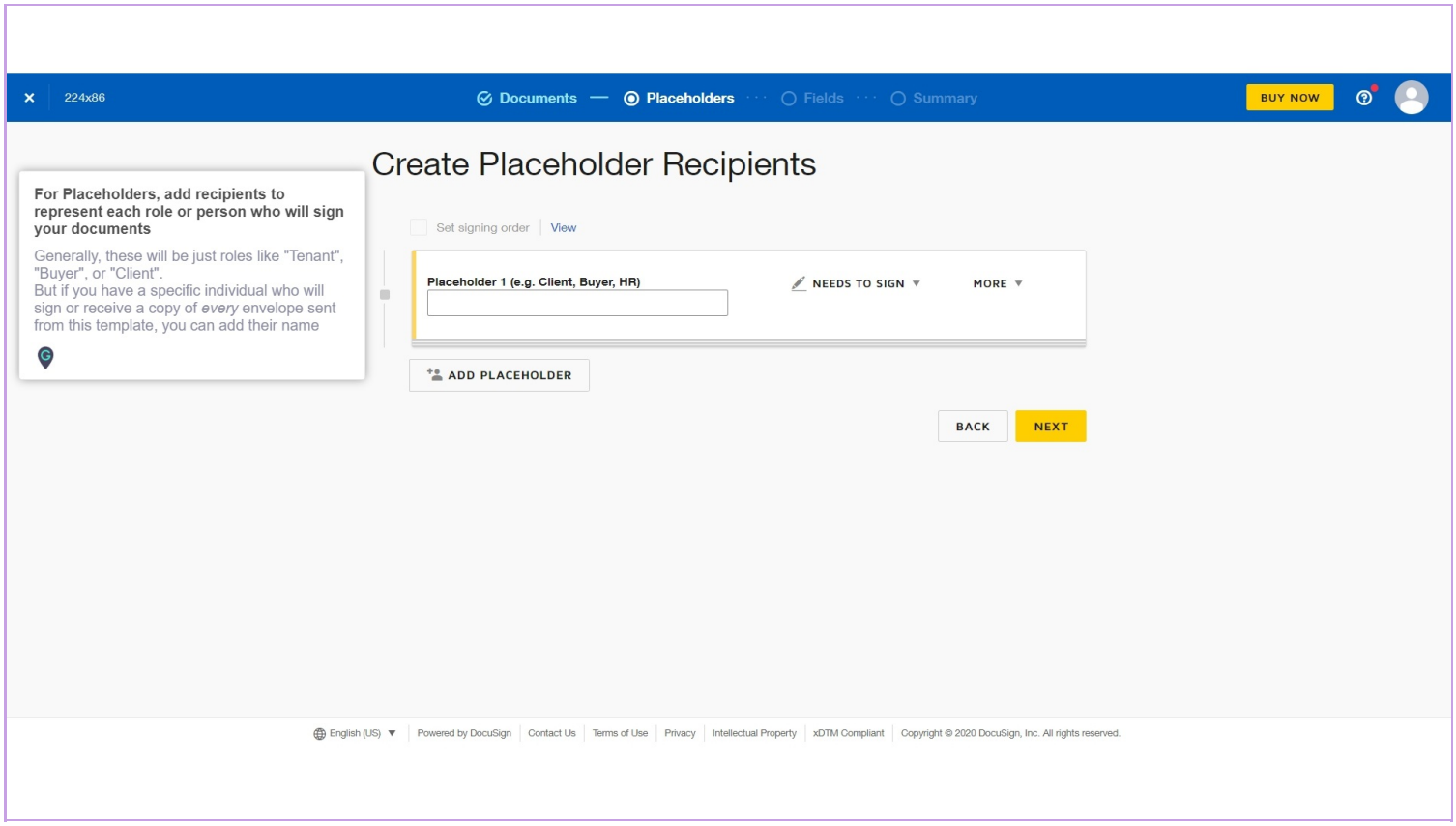
Click on "Next"



Step: 06

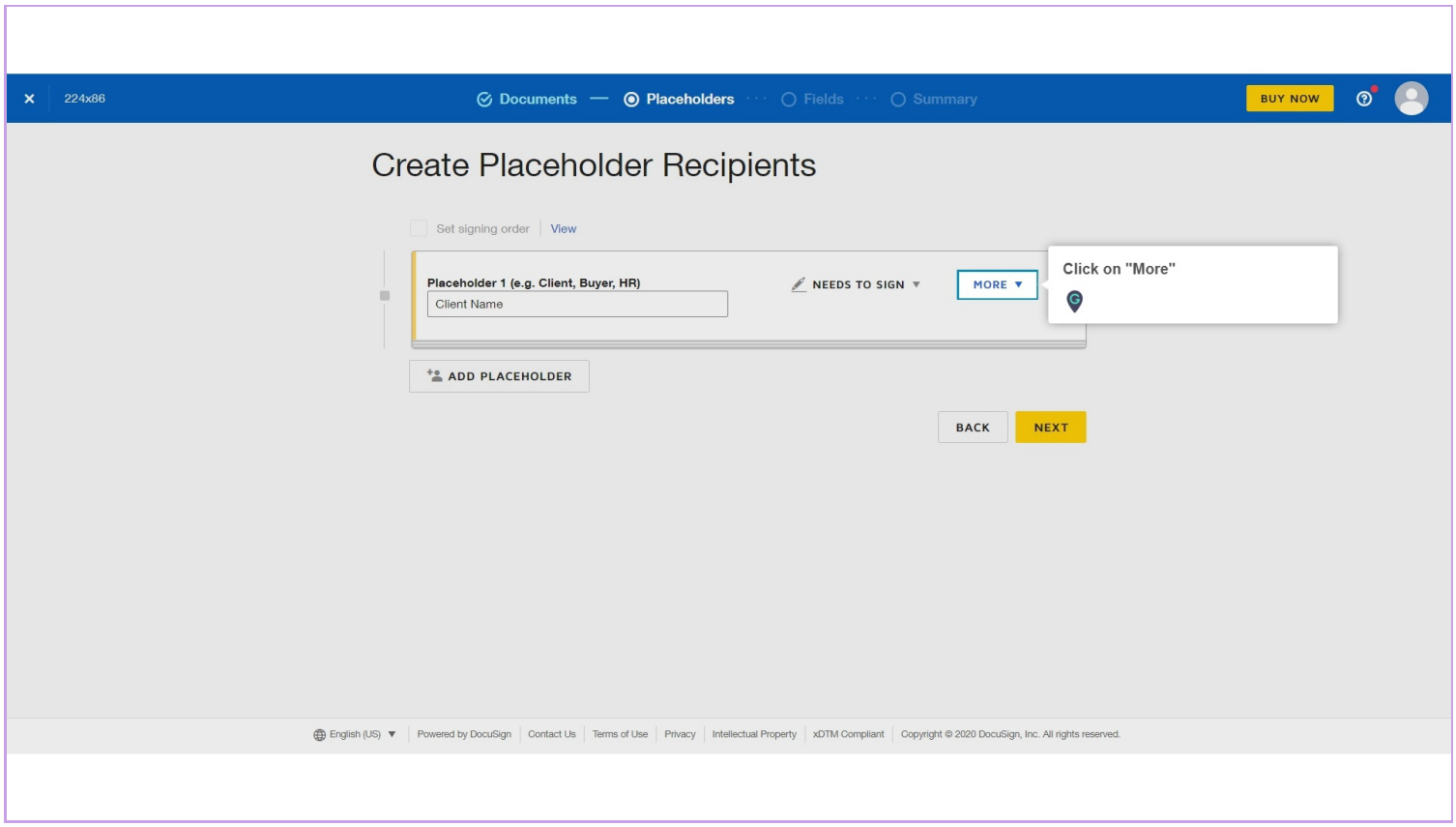
For Placeholders, add recipients to represent each role or person who will sign your documents

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



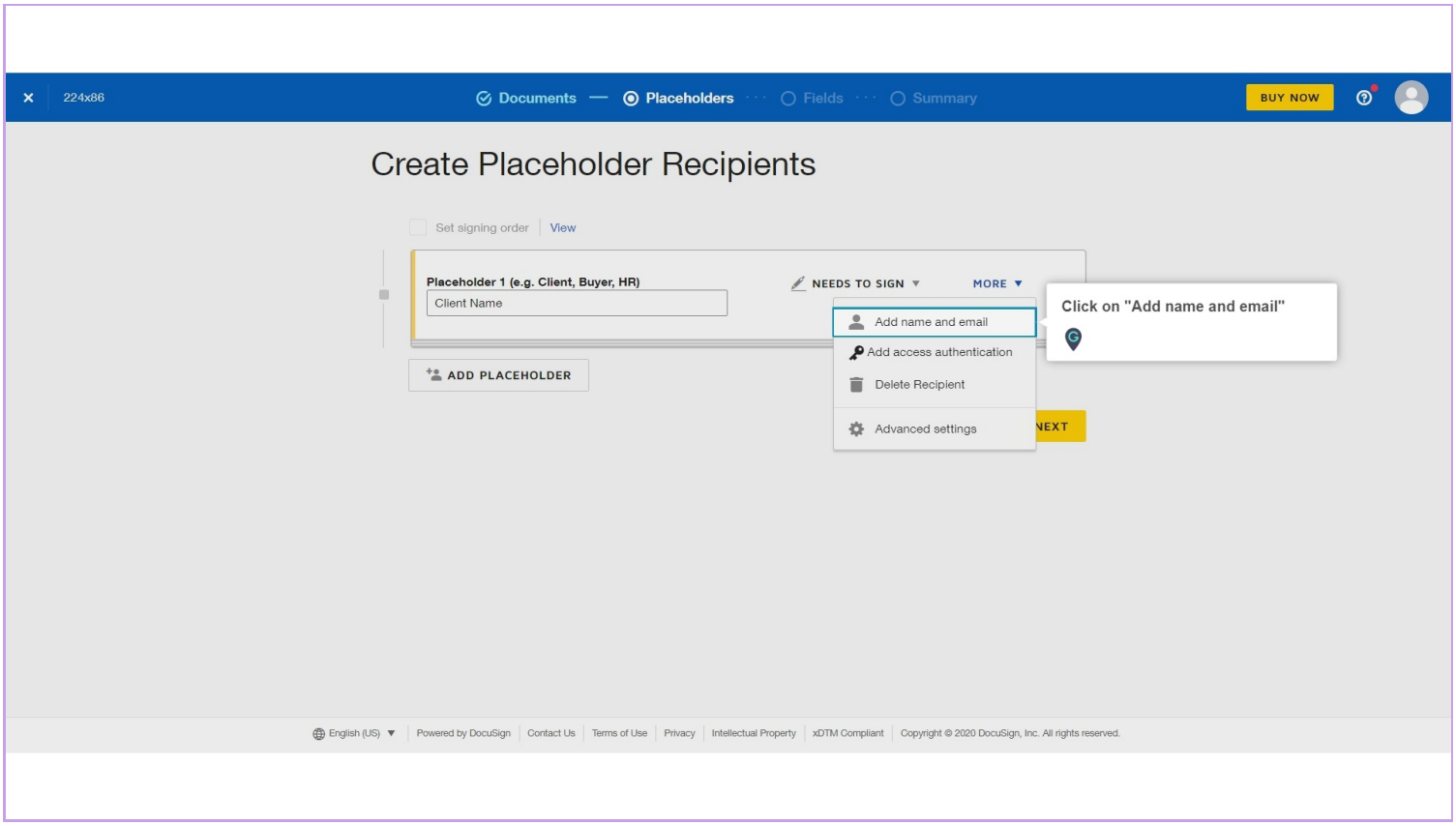
Step: 07

Click on "More"



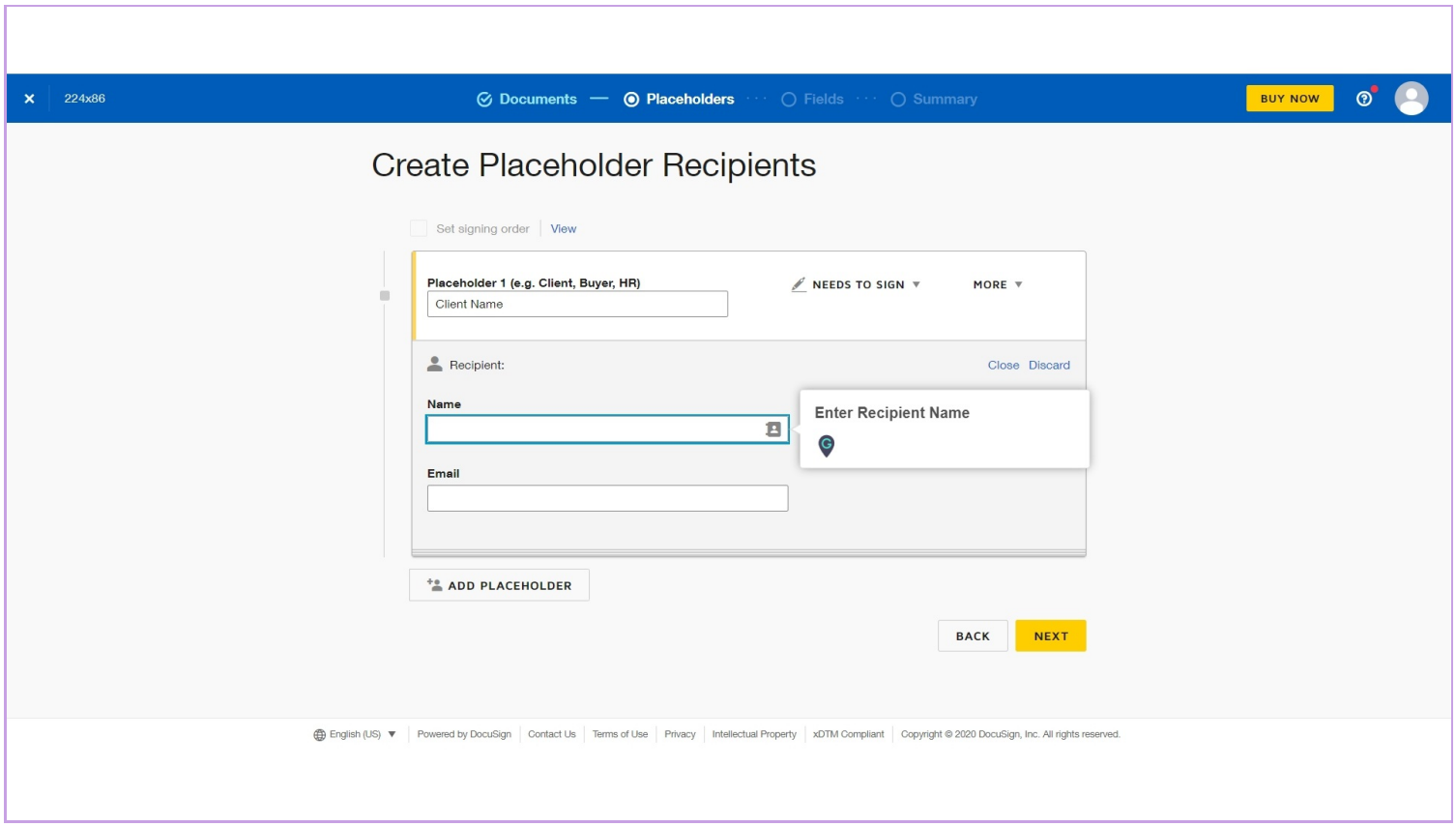
Step: 08

Click on "Add name and email"



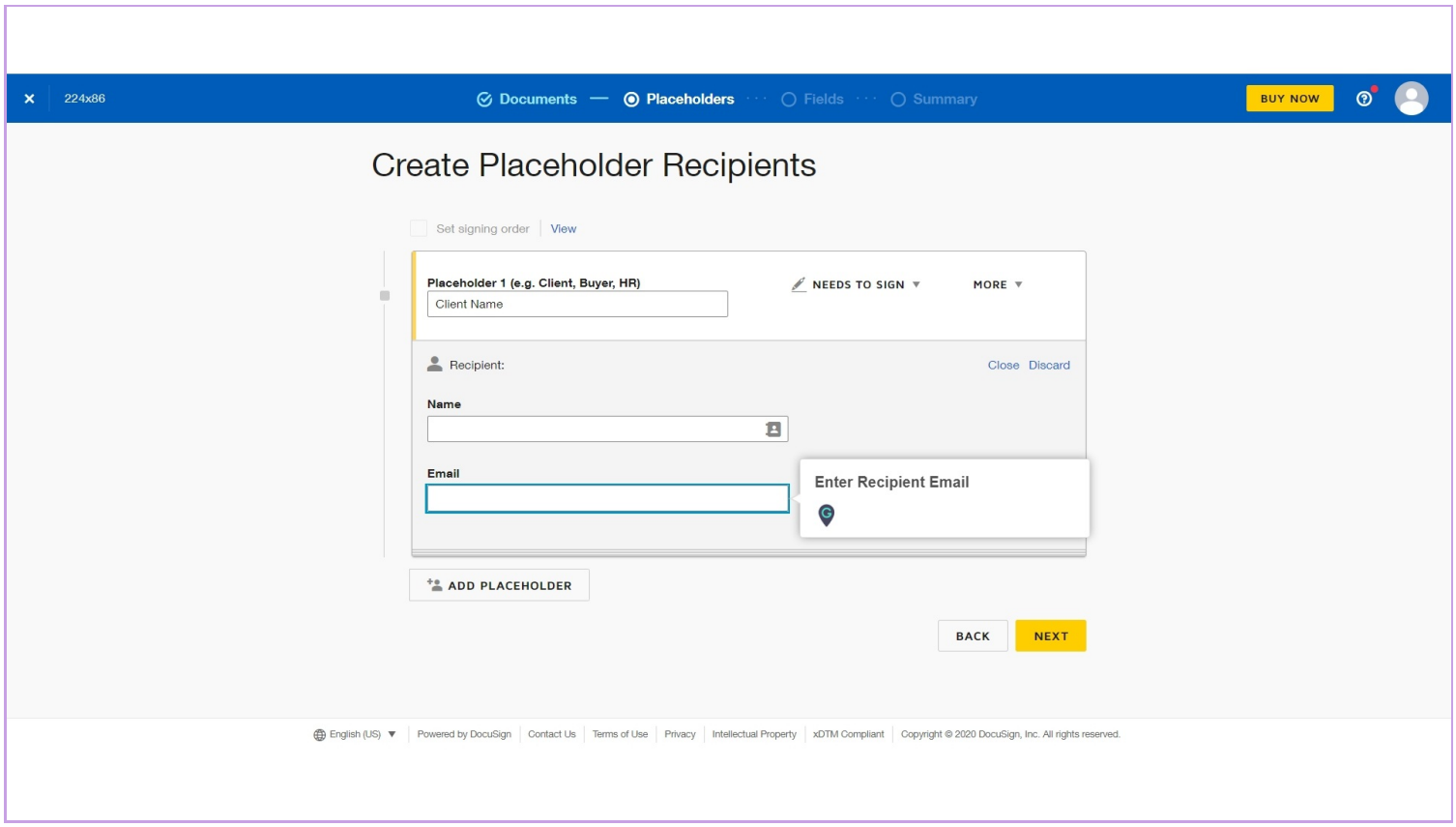
Step: 09

Enter Recipient Name



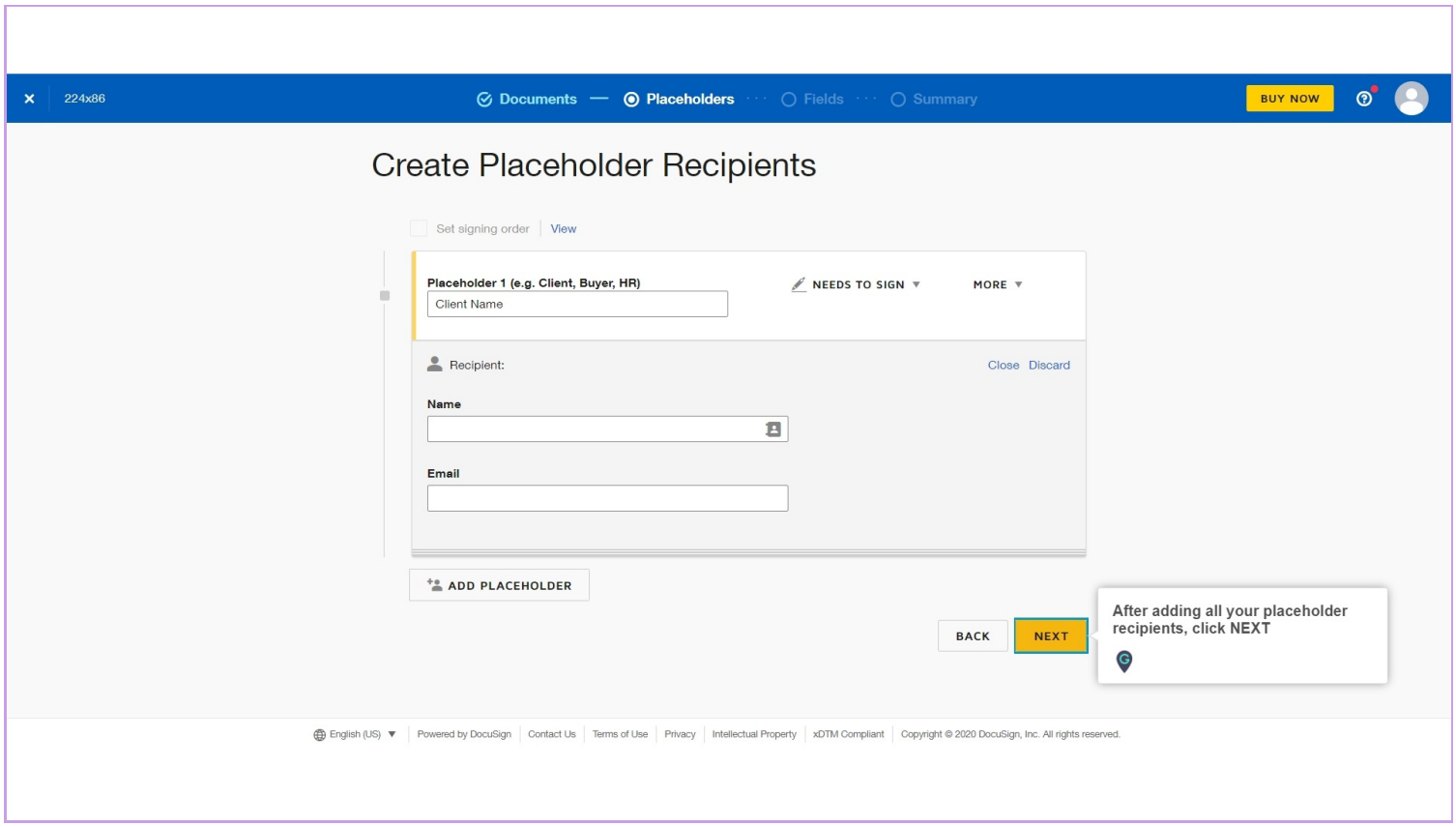
Step: 10

Enter Recipient Email



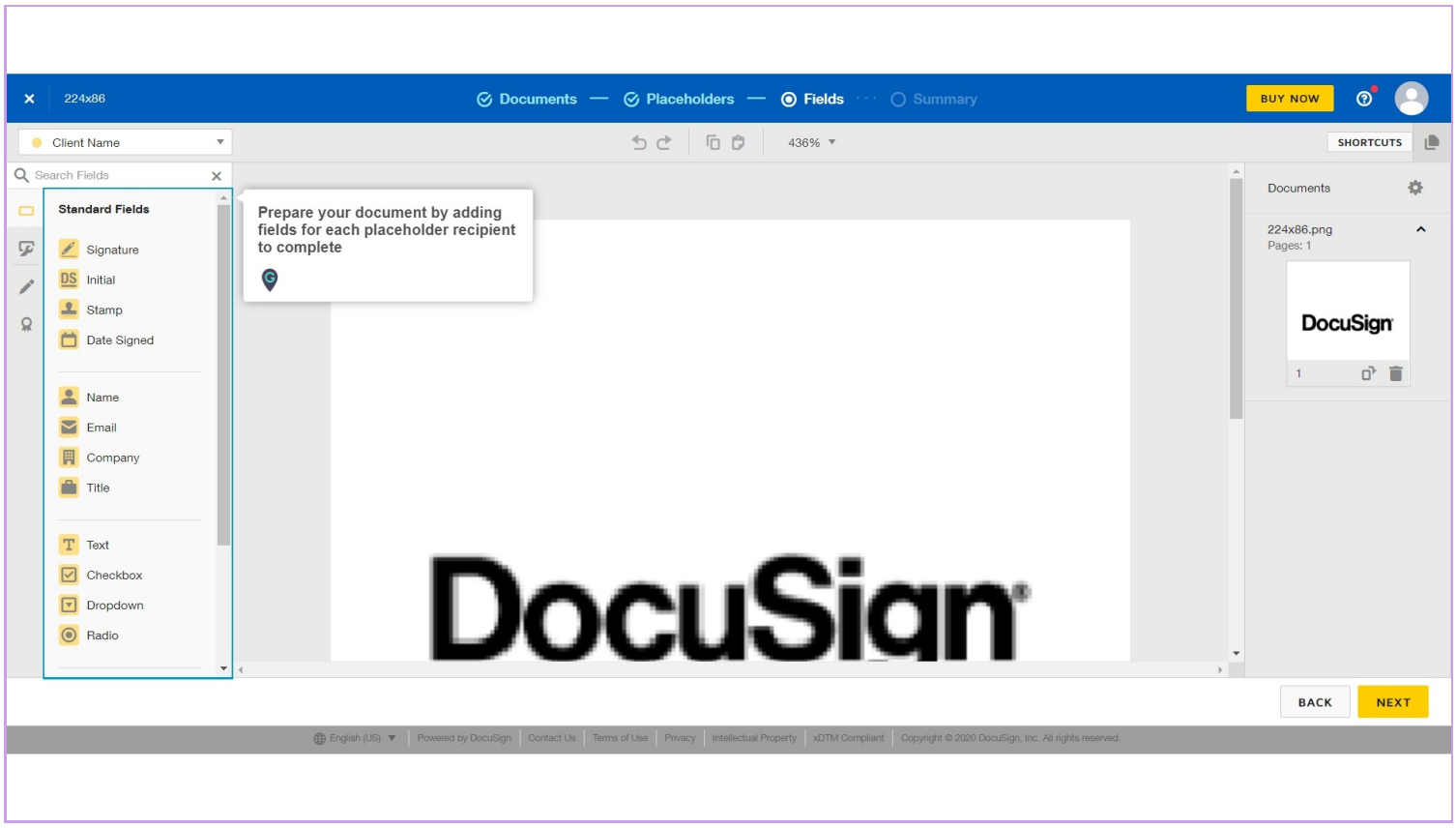
Step: 11

After adding all your placeholder recipients, click NEXT



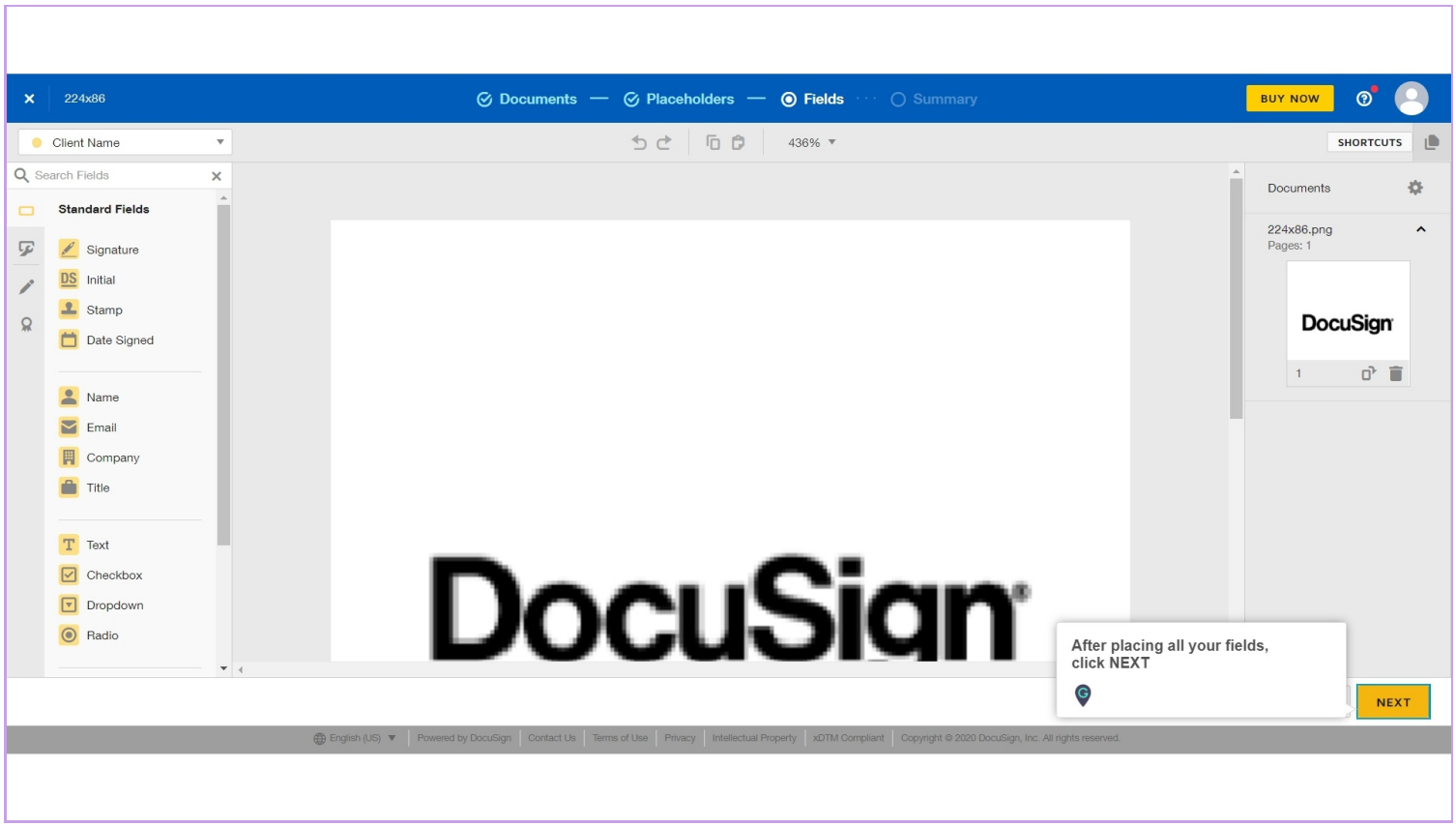
Step: 12

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



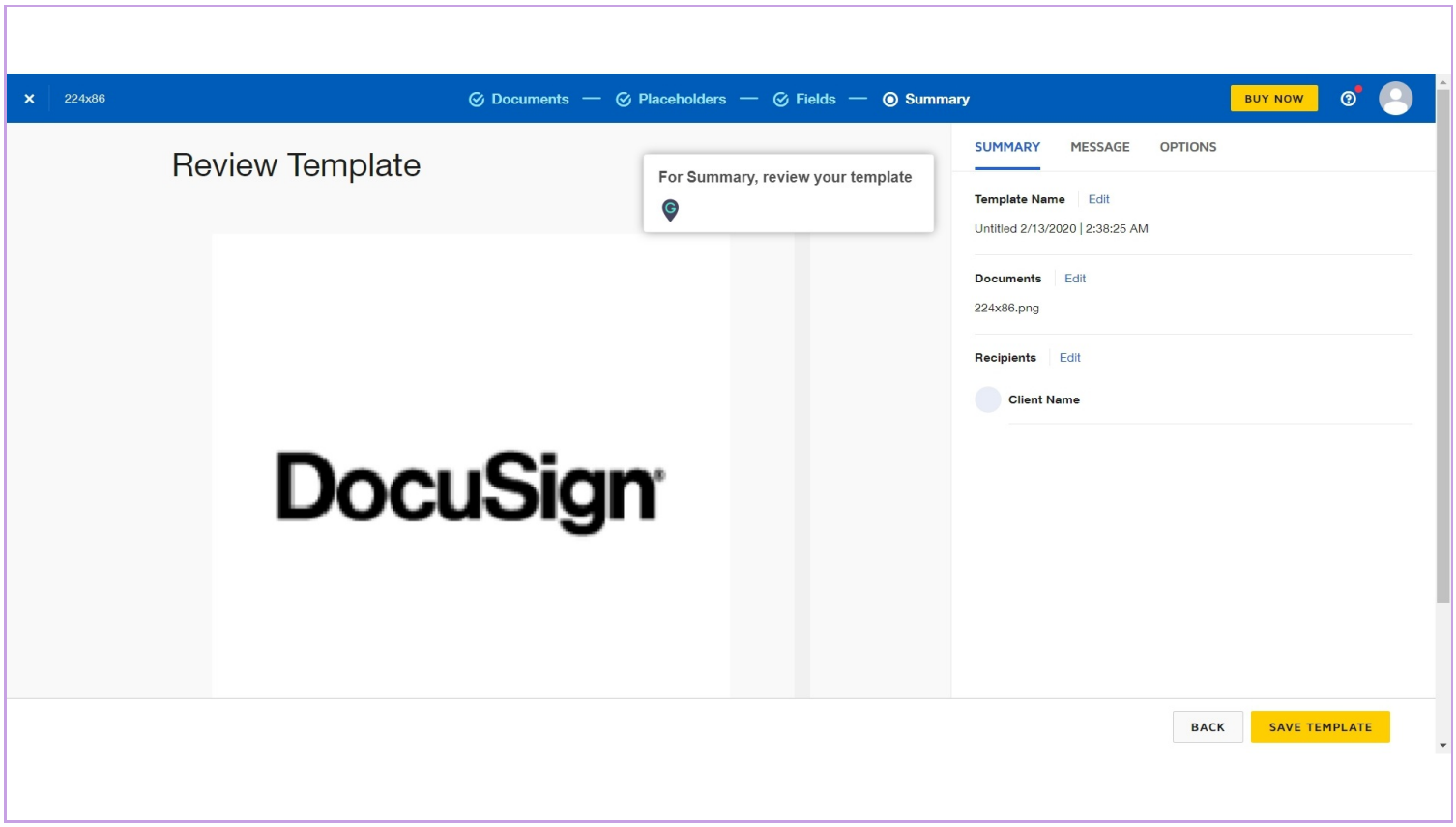
Step: 13

After placing all your fields, click NEXT



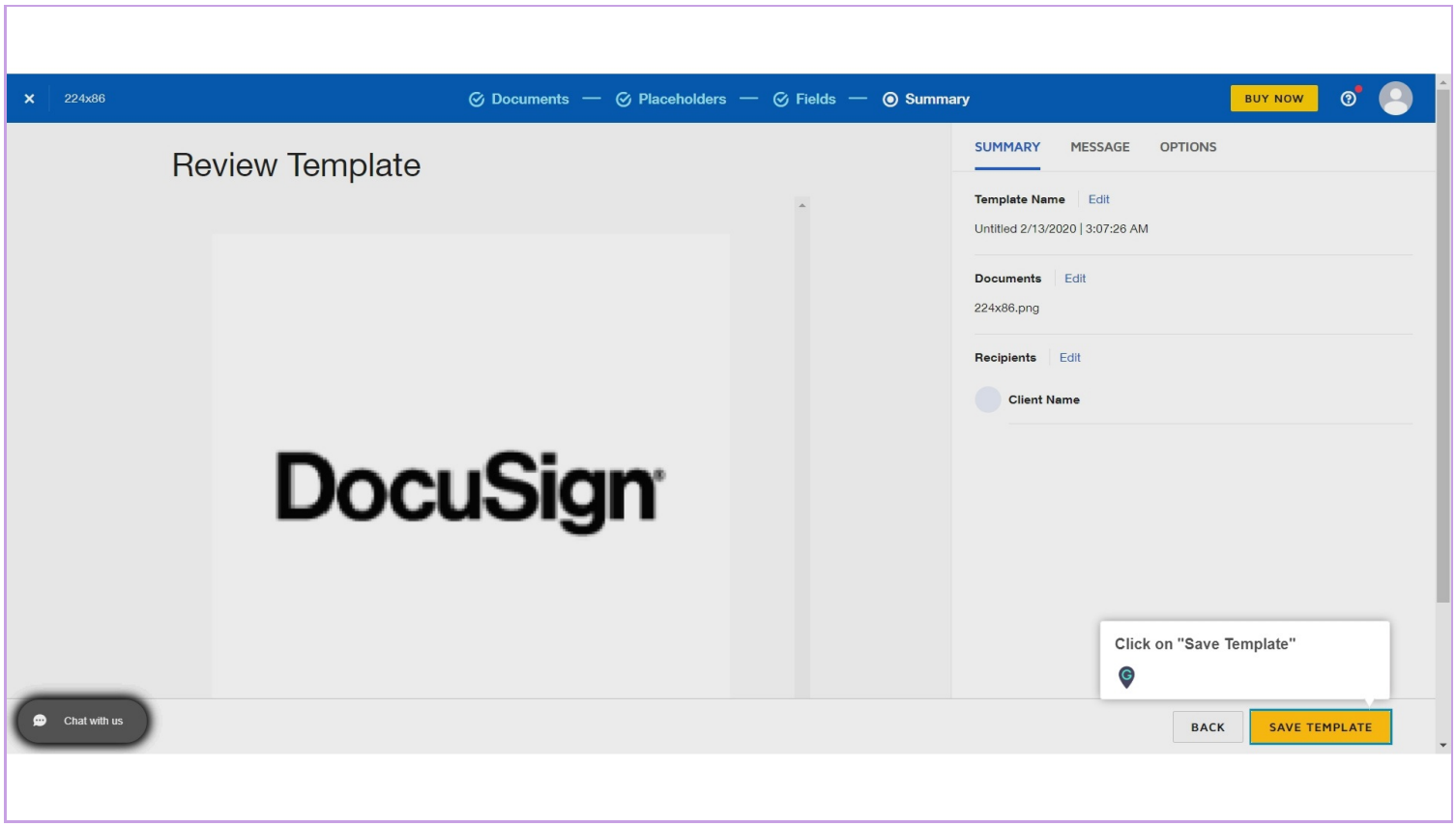
Step: 14

For Summary, review your template



Step: 15

Click on "Save Template"



Thank You!

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