

Bulk Sending Scenario - Request Signature of same Company Policy by all Employees

Bulk Sending Explanation v 3.1

Sending a bulk is basically creating multiple independent envelopes, which are linked together by an identifier (bulk id). The API allows accessing the bulk and its envelopes. A bulk step is a step with multiple recipients.

 Please note that only one bulk per envelope is allowed.

The Story

The head of the company wants to send the new company policy to all employees. For this process he/she is using eSignAnyWhere to send a bulk. With this feature the creator of the bulk just has to add the recipients within the bulk and send the document once. Then, all recipients get the document and all can sign without dependence. You find a [list of available stories here](#).

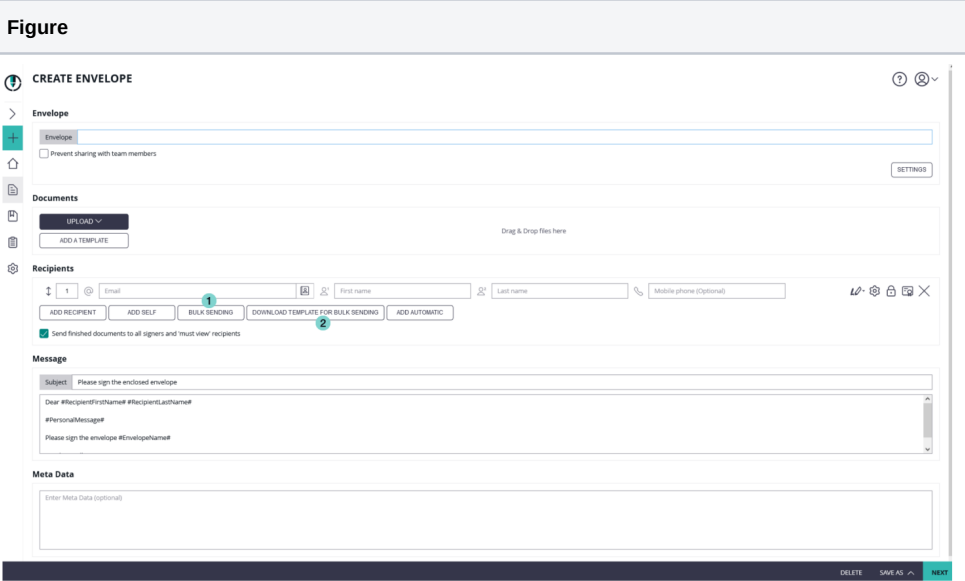
Please also see the developer mode for this tutorial here: [Visit the developer mode](#).

Use Case Description

- 1. Configuration in eSAW UI
- 2. Integration (api)
- 3. Creating the bulk
- 4. Add recipients within the bulk
- 5. Configure for example signature fields

Configuration in eSAW UI

The following Screenshots explain the process of sending an envelope with eSAW.

Figure	Description
	1. Add a bulk as recipient 2. Create a bulk CSV for upload

New buttons “Add Bulk” and “Bulk CSV Template” are available. You can add one bulk per envelope and you are defining the bulk recipients via CSV file. The “Bulk CSV Template” generates your desired bulk recipient configuration. So you are able to define Authentication or Information for Remote or Disposable Certificates in the CSV. Please note that you have a maximum of 1000 recipients per bulk.

If you click the button “Bulk CSV template” the following window appears where you can select options you need in the CSV:

1

Envelope

Prevent sharing with team members

Documents

UPLOAD

ADD A TEMPLATE

Recipients

1

Email

ADD RECIPIENT

ADD SELF

BULK SENDING

DOWNLOAD

☒ Send finished documents to all signers and 'must view' recipients

Message

Subject

Please sign the enclosed envelope

Dear #RecipientFirstName# #RecipientLastName#

#PersonalMessage#

Please sign the envelope #EnvelopeName#

Meta Data

Enter Meta Data (optional)

Download Template for Bulk Sending

☐ First Name

☐ Last Name

☐ Email

☐ Mobile phone

☐ Personal Message

☐ Language

AUTHENTICATION

☐ Access Code

☐ Windows Live

OAuth Authorization Providers

☐ Test

ADDITIONAL SIGNATURE DETAILS

☐ SMS-OTP Signature

☐ Digital Remote Signature

☐ Disposable Certificate

☐ SwissCom On-Demand Certificate

CANCEL

GENERATE

The Bulk Recipient in the Recipient List.

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⚙️

CREATE ENVELOPE

? 👤 ✓

Envelope

Envelope

☐ Prevent sharing with team members

SETTINGS

Documents

UPLOAD ▾

ADD A TEMPLATE

Drag & Drop files here

Recipients

↓ 1 ⚙️ BULK RECIPIENTS (2) ^ CSV UPLOAD

ADD RECIPIENT

Manuel Gierlinger @

X

License License @

X

☒ Send finished documents

Message

Subject Please sign the enclosed envelope

Dear #RecipientFirstName# #RecipientLastName#

#PersonalMessage#

Please sign the envelope #EnvelopeName#

Meta Data

Enter Meta Data (optional)

DELETE

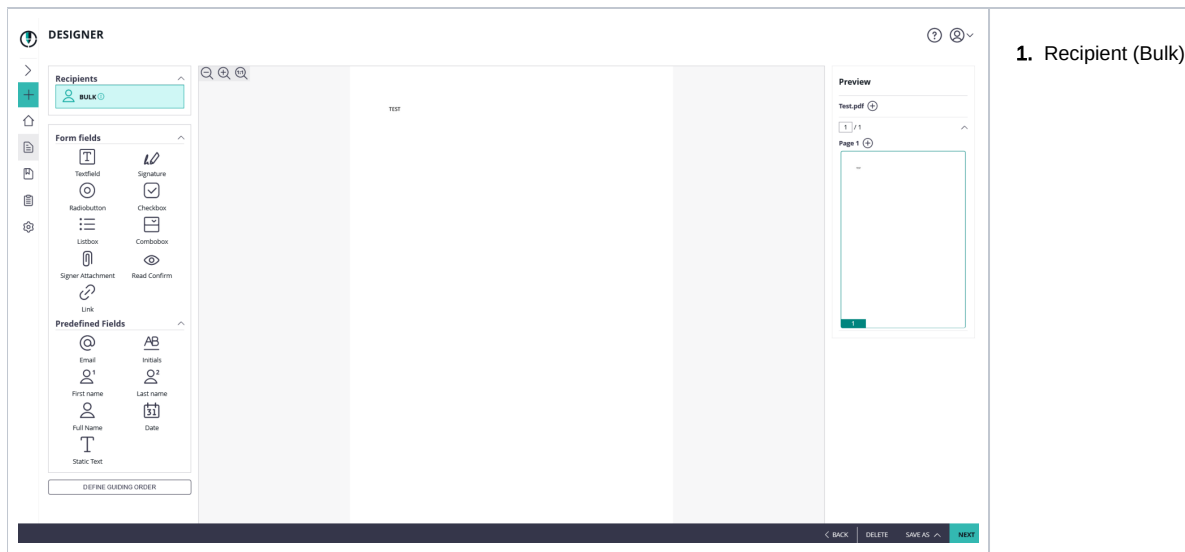
SAVE AS ▾

NEXT

You can see the uploaded recipient list and the number of recipients found in the uploaded CSV file.

Designer

Figure	Description
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1. Recipient (Bulk)

In the designer the bulk recipients behave like a normal recipient. You can place and define its signature fields, form fields or predefined fields.

Manage Bulk Envelopes

The bulk envelopes are listed normal in the document overview with special bulk envelope features. The statistics are added (number of completed, rejected, ... envelopes of the bulk). Moreover you still can control each unique workflow.

After sending the envelope you can click on “back to bulk parent” to get the following detailed overview:

Integration

The integration is quite simple. Just follow these steps

Sending a bulk is basically creating multiple independent envelopes, which are linked together by an identifier (bulk id). The API allows accessing the bulk and its envelopes. Please note that only one bulk per envelope is allowed.

1. Upload a document
2. Send the document or create a draft

The example contains a workstep configuration for a bulk with two recipients. In this case one signature field (ClickToSign) was added. After you have uploaded the file you can copy paste the workstep configuration for sending the envelope.

```

{
  "Documents": [
    {
      "FileId": "68b44e5d-1234-1234-1234-560c32549e27",
      "DocumentNumber": 1
    }
  ],
  "Name": "bulkEnvelopeName",
  "MetaData": "metaData",
  "AddDocumentTimestamp": true,
  "ShareWithTeam": true,
  "Activities": [
    {
      "Action": {
        "SignBulk": {
          "BulkRecipients": [
            {
              "RecipientConfiguration": {
                "ContactInformation": {
                  "Email": "johndoe@sample.com",
                  "GivenName": "John",
                  "Surname": "Doe",
                  "LanguageCode": "en"
                },
                "PersonalMessage": "BulkSign",
                "AllowDelegation": true
              }
            },
            {
              "RecipientConfiguration": {
                "ContactInformation": {
                  "Email": "janedoe@sample.com",
                  "GivenName": "Jane",
                  "Surname": "Doe",
                  "LanguageCode": "en"
                },
                "PersonalMessage": "BulkSign"
              },
              "SignatureDataConfiguration": {}
            }
          ]
        },
        "SequenceMode": "NoSequenceEnforced",
        "Elements": {
          "Signatures": [
            {
              "ElementId": "apiBulkSignature",
              "Required": true,
              "DocumentNumber": 1,
              "DisplayName": "Signature",
              "FieldDescription": "This is a Signature.",
              "AllowedSignatureTypes": {
                "ClickToSign": {}
              },
              "FieldDefinition": {
                "Position": {
                  "PageNumber": 1,
                  "X": 50,
                  "Y": 150
                },
                "Size": {
                  "Width": 300,
                  "Height": 100
                }
              },
              "TaskConfiguration": {
                "StampImprintDateConfiguration": {
                  "UseLocalTimezone": true,
                  "DateTimeFormat": "dd.MM.YYYY"
                },
                "UseExternalTimestampServer": false,

```

```

    "OrderDefinition": {
      "OrderIndex": 5
    }
  }
}

```

Result:

```

{
  "BulkChildren": [
    {
      "EnvelopeId": "6bda7944-1234-1234-1234-5c3140ff4a05",
      "BulkRecipientEmail": "johndoe@samaple.com"
    },
    {
      "EnvelopeId": "e85a1f99-1234-1234-1234-5894ca1d89d0",
      "BulkRecipientEmail": "janedoe@samaple.com"
    }
  ],
  "BulkParentId": "9118a857-1234-1234-1234-91b6b422eaf8"
}

```

The result of the API calls contain the bulk id and an envelope id for each recipient.

The Callbacks got an additional bulk parameter to provide the bulk id:

<http://www.mycallback.at?envelope=##EnvelopeId##&bulk=##BulkId##&action=##Action##>