DocuSign Spring '15 Release Notes

This document provides information about the updates deployed to the DocuSign Production environment as part of the March 6, 2015 DocuSign Spring '15 Release.

> **Note:** Some items listed in the Release Notes were implemented in previous monthly service packs. The month the item was implemented is given in the heading for that item. The list of features, descriptions, and other release information are updated on a regular basis until the actual release date. Be sure to check the full release notes link DocuSign web site Upcoming Release page for updates. Changes to the release notes since the previous version are shown by a change bar on the left side of the page.

Contents

Discontinued Support of SSLv3

On October 14, 2014, a vulnerability in Secure Sockets Layer (SSL) version 3 was announced under the name POODLE (Padding Oracle on Downgraded Legacy Encryption). This vulnerability impacts the way clients and servers secure their communications over a network and can expose information that was previously protected. The National Vulnerability Database has rated this issue as medium severity and assigned it the tracking number CVE-2014-3566.

As a corrective action for this issue DocuSign will discontinue support for SSLv3.

For more information about this issue, please refer to the following:

- US-CERT Alert TA14-290A: https://www.us-cert.gov/ncas/alerts/TA14-290A
- NVD Vulnerability Summary for CVE-2014-3566: http://web.nvd.nist.gov/view/vuln/detail?vulnId=CVE-2014-3566

Schedule

DocuSign plans to discontinue support of the SSLv3 protocol on the following dates:

- February 23, 2015   Demo environment (North America)
- March 10, 2015   EU Production environment
- March 23, 2015   North American Production environments

Action

Customers should be aware of these important dates and ensure that all browsers and clients have been updated to recent versions in order to support the change. You will be able to check connections to the DocuSign Demo environment for this after February 23, 2015.

> **IMPORTANT:** Once the disabling of SSLv3 is completed on DocuSign's core platform, customers using legacy browsers or unique configurations might not be able to connect to DocuSign's web servers.

If you have any questions, please email or call (866) 219-4318 to contact your DocuSign Account Manager.

New DocuSign Experience Release Information

You can keep up with the latest news for the New DocuSign Experience on the WHAT'S NEW, WHAT'S COMING section of the New DocuSign Experience web application Home page. There you can read about the new features and upcoming enhancements. You can also visit the new DocuSign Experience Announcements page for the full release notes.

With the New DocuSign Experience, some aspects are new, some are different, and some things are not there. For some account types, everything from the Classic DocuSign Experience is already available in the New DocuSign Experience. For others, if you do not see something you are used to using, you can always switch back to the Classic DocuSign Experience, using the account settings menu at the top right of all the main application pages.

New Signing Experience Updates

As part of the continuing improvements for the new signing experience, DocuSign has added the following changes. These changes only apply to the new signing experience.

Remember that on August 31, 2015 the previous signing experience will be retired and all users will be automatically transitioned to the most recent version of the new signing experience. There will be no exceptions to this.

Updated Browser Support Information

With the DocuSign Spring '15 release signers can use Internet Explorer 9 and above in compatibility mode with the new signing experience.

Note that signers using Internet Explorer 8 in compatibility mode cannot use the new signing experience and will receive a Browser Not Supported message asking them to update their browser or turn off compatibility mode.

Decline Warning (added in February)

This change adds a new warning dialog that provides additional information to signers about the action they are about to take when selecting the **DECLINE TO SIGN** option from the Other Actions menu.
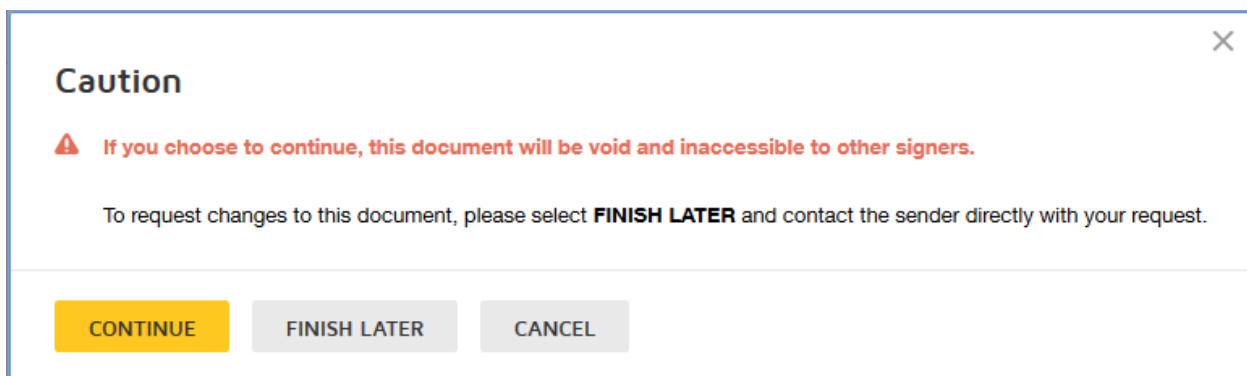
If the signer clicks **CONTINUE**, then they follow the normal Decline to Sign actions for your account. Clicking **FINISH LATER** closes the signing experience, saving any information the signer might have entered. Clicking **CANCEL** returns the signer to the signing experience.

> **Note:** The text in the warning dialog can be modified in the signing resource file.

Disabling Return by Fax (added in February)

This change allows customers that use signing resource file branding to disable the fax option for the Printing & Sign option and for returning signer attachments, requiring signers to upload their documents and attachments.

Note: You must have resource file branding enabled for your account to change these options.

The fax options are controlled by the following lines in the DocuSign signing resource file:

- DocuSign_FaxAllowForSignOnPaper
- DocuSign_FaxAllowForAttachment

When **DocuSign_FaxAllowForSignOnPaper** is set to **false** in the brand profile signing resource file, the text discussing faxing documents back is removed from the print and sign option and uploading is the only available method of returning documents.

PRINT & SIGN

Print the document and sign in ink.
Then either scan and upload or fax
back the document.

PRINT & SIGN

Print the document and sign in ink.
Then upload the document to finish
signing.

Print & Sign option – fax available   **Print & Sign option – fax disabled**

Print & Sign dialog – fax available

Print & Sign dialog – fax disabled

When **DocuSign_FaxAllowForAttachment** is set to **false** in the brand profile signing resource file, the fax option, and subsequent fax dialogs, is removed for returning signer attachments.

Add your Attachment dialog – fax available
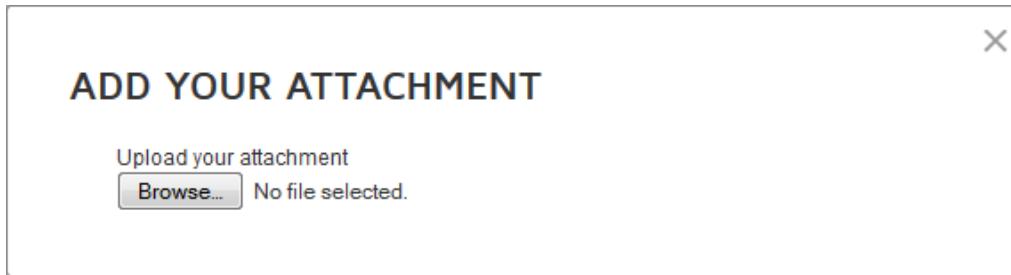
Add your Attachment dialog – fax disabled

Classic DocuSign Experience Updates

Field Markup Update

This update adds a new optional tag property, called **Require All**, associated with the field markup feature. When field markup is enabled for the tag (**Allow All To Edit** is selected) and **Require All** is selected, information must be entered in this tag in order for the signer to complete the envelope.

The **Require All** property is available for the Data Field, Radio Button, and Drop Down tags.

> **Note:** The **Require All** property is not included for the Check Box tag since enabling **Require All** would require that the check box be selected (checked).

Envelopes sent with the **Require All** property enabled follow the same flow as other envelopes that have field markup enabled.

Document Retention Update (added in February)

This update adds the option to remove additional information from the DocuSign system when documents are deleted.

This setting can be enabled in the Classic DocuSign Experience by clicking your profile image in the upper right and selecting **Preferences**. In the navigation pane on the left side of the page, under the Account Administration heading, click **Features**. Under the Manage Account section, click the **Document Retention** link to go to the Document Retention Settings page.

When a document retention setting is set and the **Remove meta data** option is selected, DocuSign will delete the original envelope documents, any fields that were added to the documents, and any attachments that were added the envelope from the system. When a document retention setting is set and the option is not selected, then DocuSign only deletes the original envelope documents from the system.

When the retention date setting is reached, the envelope documents and, if selected, the envelope meta data are placed in a purge queue for deletion in 14 days. A warning email notification is sent to the sender and recipients associated with the envelope notifying them that the envelope document will be deleted in 14 days and providing a link to the documents. Another email is sent 7 days later with the same message. At the end of the 14-day period, the envelope documents and, if selected, the envelope meta data are deleted from the system.

DocuSign Connect Configurations (added in January)

We have updated the system configuration setting to increase the number of Connect configurations for an account. An account can now have a maximum of 100 configurations in each DocuSign environment (DEMO and Production). The previous maximum number of configurations was 10.

API Changes for the DocuSign Spring '15 Release

This section provides addition information on the API changes to implement the features in the DocuSign Spring '15 Release. The following table shows a list of the features in the release that impact the DocuSign SOAP and REST APIs.

REST API Changes

Using Bulk Send in the REST API

With the Bulk Send feature, you can easily send the same document to a large number of recipients. You just create a file that contains the list of recipient names and email addresses, start an envelope, select your documents, add the bulk recipient file you created as a recipient, and send the envelope. Once you send an envelope with a bulk recipient file, DocuSign creates a separate envelope for each recipient in the bulk recipient file – eliminating the need to separately create and send an envelope for each signer.

Additionally, you can customize authentication (access code, ID check, phone authentication or social network IDs), add notes and other custom information for each recipient in the list by adding the information to the file.

Bulk Send Limitations:

- Bulk send can only be used with Signer recipient types and there can only be one bulk recipient in an envelope or template. An envelope or template can have other Signers and recipient types that are added to the envelope or template normally. When a bulk recipient file is added to an envelope, the single bulk recipient Signer is replaced with all recipients in the bulk recipient file. There can only be one bulk recipient file associated with an envelope when it is sent.

- When an envelope with bulk recipients is sent, the envelopes are added to a bulk recipient queue and sent in a metered fashion. There is a limit of 2,000 envelopes in the bulk recipient queue and an error message is shown to the sender if this limit is reached. If you receive this error, you should wait and resend the envelope at a later time.

> **Note:** If you frequently run into queue limits, please contact your account manager to discuss modifying the queue limits for your account.

General steps to use Bulk Send:

- Create the bulk recipient CSV (Comma Separated Value) file.

  The required and optional information that can be included the file is described in the Add or Replace an Envelope Bulk Recipient File section.

- Create draft envelope with a bulk recipient signer. The envelope can be created from a template that has a bulk recipient.

  A bulk recipient signer is a Signer recipient type where "isBulkRecipient" is set to true. (Note there can only be one bulk recipient signer per envelope).

  Templates and draft envelopes can be saved with a bulk recipient signer, but a bulk recipient file must be uploaded before an envelope with a bulk recipient signer can be sent.

- Add (PUT) the bulk recipient file to the envelope.

- Send the draft envelope.

  Transitioning an envelope with a bulk recipient signer from "created" to "sent" triggers the sending of an envelope for each recipient in the associated bulk recipient file. The original (draft) envelope is discarded. The response returned from sending the envelope included:

  - bulkRecipientsBatchId: This is the batch identifier used to query the status of the entire bulk send operation.

  - bulkRecipientTransactions: This is an array with identifying information about each envelope sent. The information included in this response:

    - transactionId: The ID used to reference the queued envelope transaction.

    - name: The name of the recipient assigned to this envelope transaction.

    - email: The email address of the recipient assigned to this envelope transaction.

Additional Bulk Send Account Settings

The following account setting was added for this change.

Setting Name	Value	Authorization Required	Description
enableBulkRecipient	Boolean	Admin	When true, the account allows bulk sending of envelopes.

Additional Bulk Send User Settings

The following user setting was added for this change.

Setting Name	Value	Authorization Required	Description
allowBulkRecipients	Boolean	Admin	When true, this user can use the bulk send functionality.

Changes to Signers Recipient Type for Bulk Send

The following parameters were added to the Signer Recipient Type.

Name	Reqd?	Type	Description
isBulkRecipient	No	Boolean	When true, this signer is a bulk recipient and the recipient information is contained in a bulk recipient file. Note that when this is true the email and name for the recipient becomes bulk@recipient.com and "Bulk Recipient". These fields may not be changed for the bulk recipient.
bulkRecipientsUri	No	String	The URL for the bulk recipient file with the bulk recipient information for this envelope. This information is only shown after the bulk recipient file is uploaded (PUT) to the envelope.

Add or Replace an Envelope Bulk Recipient File

This adds or replaces a bulk recipient file to a draft envelope. The Content-Type supported for uploading a bulk recipient file is CSV (text/csv).

The REST API does not support modifying individual rows or values in the bulk recipients file. It only allows the entire file to be added or replaced with a new file.

URL:

/accounts/{accountId}/envelopes/{envelopeId}/recipients/{recipientId}/bulk_recipients

Formats:

XML, JSON

HTTP Method:

PUT

Parameters:

The only required parameters are the envelope ID and recipient ID.

The parameters listed below are the supported fields for the csv file being added to the envelope. The first row of the csv file is the header row that must have the field names for the file. Each subsequent row represents a unique recipient with the information for that recipient.

There can be a maximum of 1,000 rows in the bulk recipient csv file.

The characters <, >, #, and & cannot be used in the bulk recipient csv file.

If the value you are adding has a comma or double-quotation marks ("), the value must be enclosed in double-quotation marks ("). Example: if you have a Text tab with a tabLabel of Group and one of the entries for a recipient is Inside Sales, NE, the would use "Inside Sales, NE" in the Group column for that recipient.

Name	Reqd?	Type	Description
Name	Yes	String	The recipient's name. This can be a maximum of 50 characters.
Email	Yes	Sting	The recipient's email address. This can be a maximum of 100 characters.
Note	No	String	A note that will be unique to this recipient. This note will be sent to the recipient via the signing email. This note will also display in the signing UI. This can be a maximum of 1000 characters.
AccessCode	No	String	If a value is provided, the recipient must enter the value as the access code to view and sign the envelope. This can be a maximum of 50 characters and must conform to account's access code format setting.
			If blank, but the signer accessCode is specified in the envelope, then that value is used.
			If blank and the signer accessCode is not specified, then access code is not required.
Identification	No	String	Specifies the authentication check used for the signer. If blank then no authentication check is required for the signer. Only one value can be used in this field.
			The acceptable values are:
			• KBA: Enables the normal ID check authentication set up for your account.
			• Phone: Enables phone authentication.
			• SMS: enables SMS authentication.

Name	Reqd?	Type	Description
PhoneNumber	No	String	This is only used if the **Identification** field has **Phone** or **SMS**. The value for this field can be a valid telephone number or, if Phone, usersupplied (SMS authentication cannot use a user supplied number). Parenthesis and dashes can be used in the telephone number. If "usersupplied" is used, the signer supplies his or her own telephone number.
{tabLabel}	No	String	This is used to populate recipient tabs with information. This allows each bulk recipient signer to have different values for their associated tabs. Any number of tabLabel columns can be added to the bulk recipient file. The information used in the bulk recipient file header must be the same as the tabLabel for the tab. The values entered in this column are automatically inserted into the corresponding tab for the recipient in the same row.

Example Bulk Recipient CSV File

```
Name,Email,Note,AccessCode,Identification,PhoneNumber,address1
David Jones,david.jones@yahoo.com,Here is the document we discussed.,,ID Check,,123
Main St
Kevin Smith,kevinmith@yahoo.com,,2243,,,697 My Way
Elisabeth Bozick,elisabeth.bozick@yahoo.com,,,phone,usersupplied,827 1st Ave
```

Example Request Body

```
PUT https://{server}/restapi/{apiVersion}//accounts/{accountId}/envelopes/
{envelopeId}/recipients/{recipientId}/bulk_recipients

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integra
torKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Content-Type: application/json
Content-Disposition: file;filename={file name};fileExtension=.csv
```

Response

The response returns the recipient information for each row of the bulk recipient csv file, the total number of recipients in the file, and the bulkRecipientUri.

Example Response

```
{
  "bulkRecipients": [
    {
```

```
        "rowNumber": "string",
        "email": "string",
        "name": "string",
        "note": "string",
        "accessCode": "string",
        "identification": "string",
        "phoneNumber": "string",
        "tabLabels": [
          {
            "name": "string,"
            "value": "string"
          }
        ]
      },
      {
        "rowNumber": "string",
        "email": "string",
        "name": "string",
        "note": "string",
        "accessCode": "string",
        "identification": "string",
        "phoneNumber": "string",
        "tabLabels": [
          {
            "name": "string,
            "value": "string"
          }
        ]
      }
    ],
    "bulkRecipientsCount": "string",
    "bulkRecipientsUri": "string"
}
```

Retrieve Envelope Bulk Recipient File

This is used to retrieve the bulk recipient file information for an envelope with a bulk recipient.

URL:

/accounts/{accountId}/envelopes/{envelopeId}/recipients/{recipientId}/bulk_recipients

Formats:

XML, JSON

HTTP Method:

GET

Parameters:

The only required parameters are the envelope ID and recipient ID.

Example Request Body

```
GET https://{server}/restapi/{apiVersion}//accounts/{accountId}/envelopes/
{envelopeId}/recipients/{recipientId}/bulk_recipients
```

```
X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integr
atorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json
```

Response

The response returns the recipient information for each row of the bulk recipient csv file, the total number of recipients in the file, and the bulkRecipientUri.

The following example shows the response json body.

Example Response Body

```
{
  "bulkRecipients": [
    {
      "rowNumber": "string",
      "email": "string",
      "name": "string",
      "note": "string",
      "accessCode": "string",
      "identification": "string",
      "phoneNumber": "string",
      "tabLabels": [
        {
          "name": "string,"
          "value": "string"
        }
      ]
    },
    {
      "rowNumber": "string",
      "email": "string",
      "name": "string",
      "note": "string",
      "accessCode": "string",
      "identification": "string",
      "phoneNumber": "string",
      "tabLabels": [
        {
          "name": "string,
          "value": "string"
        }
      ]
    }
  ],
  "bulkRecipientsCount": "string",
  "bulkRecipientsUri": "string"
}
```

Delete Envelope Bulk Recipient File

This removes the bulk recipient file from an envelope. This cannot be used if the envelope has been sent.

After using this, the bulkRecipientsUri field will not be returned in subsequent GET calls for the envelope, but the recipient will remain as a bulk recipient

URL:

/accounts/{accountId}/envelopes/{envelopeId}/recipients/{recipientId}/bulk_recipients

Formats:

XML, JSON

HTTP Method:

DELETE

Parameters:

The only required parameters are the envelope ID and recipient ID.

Example Request Body

```
DELETE https://{server}/restapi/{apiVersion}//accounts/{accountId}/envelopes/
{envelopeId}/recipients/{recipientId}/bulk_recipients

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integr
atorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json
```

Response

The response returns a success or failure.

Checking Status of all Bulk Recipient Batches

This returns status information about all the bulk recipient batches. A bulk recipient batch is the set of envelopes sent from a single bulk recipient file. The response includes general information about each bulk recipient batch.

URL:

/accounts/{accountId}/bulk_envelopes

Optional query strings: count={integer 1 to 20}, start_position={integer}

Formats:

XML, JSON

HTTP Method:

GET

Parameters:

No additional parameters are required, but the following optional query strings can be added to narrow the response results.

Name	Reqd?	Type	Description
count	No	Integer	The number of results to return. This can be 1 to 20.
start_position	No	Integer	The position of the bulk envelope items in the response. This is used for repeated calls, when the number of bulk envelopes returned is too large for one return. The default value is 0.

Example Request Body

```
GET https://{server}/restapi/{apiVersion}/accounts/{accountId}/bulk_envelopes

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integr
atorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json
```

Response

The response returns information about the envelopes sent in bulk recipient batches, including the batchId, which can be used to retrieve a more detailed status of individual bulk recipient batches.

The following example shows the response json body.

Example Response Body

```
{
  "batchSize": "string",
  "batchId": "string",
  "bulkEnvelopesBatchUri": "string",
  "failed": "string",
  "queued": "string",
  "sent": "string",
  "submittedDate": "string",
  "resultSetSize": "string",
  "startPosition": "string",
  "endPosition": "string",
  "totalSetSize": "string",
  "nextUri": "string",
  "previousUri": "string",
  "bulkEnvelopes": [
    {
      "transactionId": "string",
      "submittedDateTime": "string",
      "envelopeId": "string",
      "envelopeUri": "string",
      "bulkRecipientRow": "string",
      "name": "string",
      "email": "string",
      "bulkStatus": "string"
    }
  ]
}
```

Checking the Status of a Bulk Send Batch

This returns status information about a single bulk recipient batch. A bulk recipient batch is the set of envelopes sent from a single bulk recipient file.

URL:

/accounts/{accountId}/bulk_envelopes/{batchId}

Optional query strings: include={all, failed, queued, processing, sent}

Formats:

XML, JSON

HTTP Method:

GET

Parameters:

The only required parameter is the batchId.

The following optional query strings can be added to narrow the response results.

Name	Reqd?	Type	Description
include	No	String	Sets which entries are included in the response. Multiple entries can be included by using commas in the query string (example: ?include="failed,queued")
			Valid entries are:
			• all - Returns all entries. If present, overrides all other query settings. This is the default if no query string is provided.
			• failed - This only returns entries with a failed status.
			• queued - This only returns entries with a queued status.
			• processing – This only returns entries with a processing status.
			• sent – This only returns entries with a sent status.

Example Request Body

```
GET https://{server}/restapi/{apiVersion}/accounts/{accountId}//bulk_envelopes
/{batchId}

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integr
atorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json
```

Response

The response returns status information about a single bulk recipient batch.

The following example shows the response json body.

Example Response Body

```
{
  "bulkEnvelopeStatuses": [
    {
      "batchSize": "string",
      "batchId": "string",
      "bulkEnvelopesBatchUri": "string",
      "failed": "string",
      "queued": "string",
      "sent": "string",
      "submittedDate": "string",
      "resultSetSize": "string",
      "startPosition": "string",
      "endPosition": "string",
      "totalSetSize": "string",
      "nextUri": "string",
      "previousUri": "string",
      "bulkEnvelopes": [
        {
          "transactionId": "string",
          "submittedDateTime": "string",
          "envelopeId": "string",
          "envelopeUri": "string",
          "bulkRecipientRow": "string",
          "name": "string",
          "email": "string",
          "bulkStatus": "string"
        }
      ]
    }
  ],
  "resultSetSize": "string",
  "startPosition": "string",
  "endPosition": "string",
  "totalSetSize": "string",
  "nextUri": "string",
  "previousUri": "string"
}
```

Add or Replace an Template Bulk Recipient File

This adds or replaces a bulk recipient file to a template. The Content-Type supported for uploading a bulk recipient file is CSV (text/csv).

The REST API does not support modifying individual rows or values in the bulk recipients file. It only allows the entire file to be added or replaced with a new file.

URL:

/accounts/{accountId}/templates/{templateId}/recipients/{recipientId}/bulk_recipients

Formats:

XML, JSON

HTTP Method:

PUT

Parameters:

The only required parameters are the template ID and recipient ID.

The parameters listed below are the supported fields for the csv file being added to the template. The first row of the csv file is the header row that must have the field names for the file. Each subsequent row represents a unique recipient with the information for that recipient.

There can be a maximum of 1,000 rows in the bulk recipient csv file.

The characters <, >, #, and & cannot be used in the bulk recipient csv file.

If the value you are adding has a comma or double-quotation marks ("), the value must be enclosed in double-quotation marks ("). Example: if you have a Text tab with a tabLabel of Group and one of the entries for a recipient is Inside Sales, NE, the would use "Inside Sales, NE" in the Group column for that recipient.

Name	Reqd?	Type	Description
Name	Yes	String	The recipient's name. This can be a maximum of 50 characters.
Email	Yes	Sting	The recipient's email address. This can be a maximum of 100 characters.
Note	No	String	A note that will be unique to this recipient. This note will be sent to the recipient via the signing email. This note will also display in the signing UI. This can be a maximum of 1000 characters.
AccessCode	No	String	If a value is provided, the recipient must enter the value as the access code to view and sign the envelope. This can be a maximum of 50 characters and must conform to account's access code format setting. If blank, but the signer accessCode is specified in the template, then that value is used. If blank and the signer accessCode is not specified, then access code is not required.
Identification	No	String	Specifies the authentication check used for the signer. If blank then no authentication check is required for the signer. Only one value can be used in this field. The acceptable values are: • KBA: Enables the normal ID check authentication set up for your account. • Phone: Enables phone authentication. • SMS: Enables SMS authentication.

Name	Reqd?	Type	Description
PhoneNumber	No	String	This is only used if the **Identification** field has **Phone** or **SMS**. The value for this field can be a valid telephone number or, if Phone, usersupplied (SMS authentication cannot use a user supplied number). Parenthesis and dashes can be used in the telephone number. If usersupplied is used, the signer supplies his or her own telephone number.
{tabLabel}	No	String	This is used to populate recipient tabs with information. This allows each bulk recipient signer to have different values for their associated tabs. Any number of tabLabel columns can be added to the bulk recipient file. The information used in the bulk recipient file header must be the same as the tabLabel for the tab. The values entered in this column are automatically inserted into the corresponding tab for the recipient in the same row.

Example Bulk Recipient CSV File

```
Name,Email,Note,AccessCode,Identification,PhoneNumber,address1
David Jones,david.jones@yahoo.com,Here is the document we discussed.,,ID
Check,,123 Main St
Kevin Smith,kevinmith@yahoo.com,,2243,,,697 My Way
Elisabeth Bozick,elisabeth.bozick@yahoo.com,,,phone,usersupplied,827 1st Ave
```

Example Request Body

```
PUT https://{server}/restapi/{apiVersion}//accounts/{accountId}/templates/
{templateId}/recipients/{recipientId}/bulk_recipients

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integr
atorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Content-Type: application/json
Content-Disposition: file;filename={file name};fileExtension=.csv
```

Response

The response returns the recipient information for each row of the bulk recipient csv file, the total number of recipients in the file, and the bulkRecipientUri.

Example Response

```
{
   "bulkRecipients": [
      {
```

```
          "rowNumber": "string",
          "email": "string",
          "name": "string",
          "note": "string",
          "accessCode": "string",
          "identification": "string",
          "phoneNumber": "string",
          "tabLabels": [
            {
              "name": "string,"
              "value": "string"
            }
          ]
        },
        {
          "rowNumber": "string",
          "email": "string",
          "name": "string",
          "note": "string",
          "accessCode": "string",
          "identification": "string",
          "phoneNumber": "string",
          "tabLabels": [
            {
              "name": "string,
              "value": "string"
            }
          ]
        }
      ],
      "bulkRecipientsCount": "string",
      "bulkRecipientsUri": "string"
}
```

Retrieve Template Bulk Recipient File

This is used to retrieve the bulk recipient file information for a template with a bulk recipient.

URL:

/accounts/{accountId}/templates/{templateId}/recipients/{recipientId}/bulk_recipients

Formats:

XML, JSON

HTTP Method:

GET

Parameters:

The only required parameters are the template ID and recipient ID.

Example Request Body

```
GET https://{server}/restapi/{apiVersion}//accounts/{accountId}/templates/
{templateId}/recipients/{recipientId}/bulk_recipients
```

```
X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integr
atorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json
```

Response

The response returns the recipient information for each row of the bulk recipient csv file, the total number of recipients in the file, and the bulkRecipientUri.

The following example shows the response json body.

Example Response Body

```
{
  "bulkRecipients": [
    {
      "rowNumber": "string",
      "email": "string",
      "name": "string",
      "note": "string",
      "accessCode": "string",
      "identification": "string",
      "phoneNumber": "string",
      "tabLabels": [
        {
          "name": "string,"
          "value": "string"
        }
      ]
    },
    {
      "rowNumber": "string",
      "email": "string",
      "name": "string",
      "note": "string",
      "accessCode": "string",
      "identification": "string",
      "phoneNumber": "string",
      "tabLabels": [
        {
          "name": "string,
          "value": "string"
        }
      ]
    }
  ],
  "bulkRecipientsCount": "string",
  "bulkRecipientsUri": "string"
}
```

Delete Template Bulk Recipient File

This removes the bulk recipient file from a template.

After using this, the bulkRecipientsUri field will not be returned in subsequent GET calls for the template, but the recipient will remain as a bulk recipient

URL:

/accounts/{accountId}/templates/{templateId}/recipients/{recipientId}/bulk_recipients

Formats:

XML, JSON

HTTP Method:

DELETE

Parameters:

The only required parameters are the template ID and recipient ID.

> **Example Request Body**
>
> ```
> DELETE https://{server}/restapi/{apiVersion}//accounts/{accountId}/templates/
> {templateId}/recipients/{recipientId}/bulk_recipients
>
> X-DocuSign-Authentication:
> <DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integr
> atorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
> Accept: application/json
> Content-Type: application/json
> ```

Response

The response returns a success or failure.

Tab Type Updates

This change adds a new optional element to the Date Tab, Email Tab, List Tab, Number Tab, SSN Tab, Text Tab, and Zip Tab.

| Name	Reqd?	Type	Description
requireAll	No	Boolean	Optional element associated with *shared* element (field markup). When true and *shared* is true, information must be entered in this field to complete the envelope.

Envelope and Template Locking (added in February)

This change adds the ability to lock an envelope or template for editing to prevent other users or recipients from accessing and changing the envelope or template. Locking is the first phase in expanding the envelope correct mechanisms. Draft envelopes, sent envelopes, and templates can all be locked.

> **Note:** API users are not required to use the new lock functionality. It is completely optional and current customer applications will continue to function as-is. If API users want to apply a set of edits on an envelope or template, the lock function simply enables them to do so without concern that other users can also be making changes to the envelope or template.

The general workflow for envelope or template locking through the REST API is:

1. Determine if envelope locking capability is available for the user. This is done by checking to see if the user setting 'canLockEnvelopes' is true for the user.

2. The user locks the envelope for editing using a POST. Draft envelopes, sent envelopes, and templates can all be locked for editing. While the envelope/template is locked, other users and recipients cannot access the envelope/template and are presented with a message, in the appropriate environment, stating that the envelope is locked. The image below shows an example envelope lock message when viewing the envelope summary in the Classic DocuSign Experience web application.
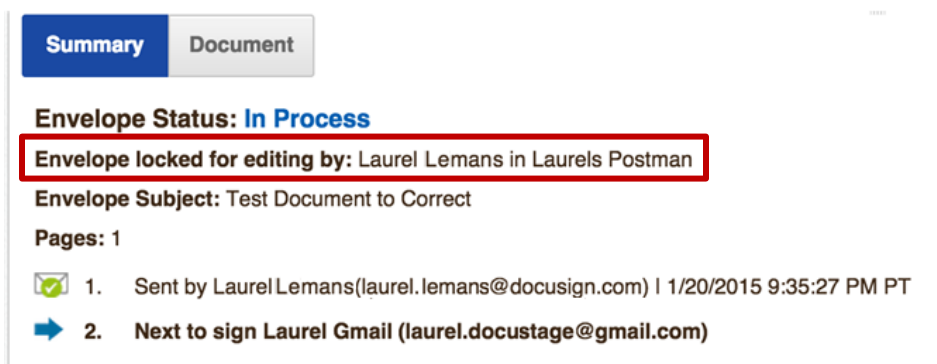
3. The user takes the lock token from the POST lock response and creates an X-DocuSign-Edit header.

4. The X-DocuSign-Edit header is added to all subsequent envelope/template calls (and their constituent parts) to show that the caller is the owner of the lock.

5. If the user is not actively editing the envelope and wants to extend the lock, the user can update the lock duration using a PUT.

6. When the user has finished editing, they use a DELETE to remove the lock.

The added calls for envelope/template locking are:

- POST /accounts/{accountId}/envelopes/{envelopeId}/lock

    This locks the envelope or template and sets the time until the lock expires.

> **Note:** When locking a template, the templateId is used in place of the envelopeId.

Name	Reqd?	Type	Description
lockDurationInSeconds	No	String	Optional setting to set the time, in seconds, until the lock expires when there is no activity on the envelope. If no value is entered, then the default value of 300 seconds is used. The maximum value is 1,800 seconds. The lock duration can be extended.
lockType	Yes	String	The type of lock being set. The accepted value is: edit

Name	Reqd?	Type	Description
useScratchPad	No	Boolean	Reserved for future use. Optional setting that shows if a scratchpad is used for editing information.
lockedByApp	No	String	Optional setting that provides an easily understood name of the application that is locking the envelope.

Example Request

```
POST https://{server}/restapi/{apiVersion}/accounts/{accountId}/envelopes/
{envelopeId}/lock

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integr
atorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json

{
      "lockDurationInSeconds": "string",
      "lockType": "string",
      "useScratchPad": "boolean",
      "lockedbyApp": "string"
}
```

Example Response

The response returns the lock information and a lock token that is used to in the X-DocuSign-Edit header to access and make changes to the locked envelope.

```
{
      "lockedByUser": {
            "userName": "string",
            "email": "string",
            "userId": "string"
      },
      "lockedByApp": "string",
      "lockedUntilDateTime": "dateTime",
      "lockDurationInSeconds": "string",
      "lockType": "string",
      "useScratchPad": "boolean",
      "token": "string"
}
```

The X-DocuSign-Edit header must be included in all subsequent envelope or template calls to show the user is the owner of the envelope lock. The header structure is:

```
X-DocuSign-Edit = <DocuSignEdit><LockToken>{token from response}
</LockToken><LockDurationInSeconds>600</LockDurationInSeconds></DocuSignEdit>
```

- PUT /accounts/{accountId}/envelopes/{envelopeId}/lock

This is used to extend the lock duration time or update the lockedByApp information. The user and integrator key must match the lockByUser user and integrator key information and the X-DocuSign-Edit header must be included or an error will be generated.

Example Request

```
PUT https://{server}/restapi/{apiVersion}/accounts/{accountId}/envelopes/
{envelopeId}/lock

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integr
atorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json

X-DocuSign-Edit = <DocuSignEdit><LockToken>{token from response}
</LockToken><LockDurationInSeconds>600</LockDurationInSeconds></DocuSignEdit>

{
        "lockDurationInSeconds": "string",
        "lockedbyApp": "string"
}
```

The response returns the same information as a POST.

- GET /accounts/{accountId}/envelopes/{envelopeId}/lock

This returns general information about the envelope lock. If the call is made by the lockedByUser and the request has the same integrator key as original, then the X-DocuSign-Edit header and additional lock information is included in the response. This allows users to recover a lost editing session token and the X-DocuSign-Edit header.

Example Response (standard)

```
{
        "lockedByUser": {
                "userName": "string",
                "email": "string",
                "userId": "string"
        },
        "lockedByApp": "string",
        "lockedUntilDateTime": "dateTime",
        "lockType": "string"
}
```


Example Response (for lockedByUser)

```
X-DocuSign-Edit: {"token": "token_string", "lockDurationInSeconds": "string"}
{
        "lockedByUser": {
                "userName": "string",
                "email": "string",
                "userId": "string"
        },
        "lockedByApp": "string",
        "lockedUntilDateTime": "dateTime",
        "lockDurationInSeconds": "string",
        "lockType": "string",
        "useScratchPad": "boolean",
```

```
        "token": "string"
}
```

- DELETE /accounts/{accountId}/envelopes/{envelopeId}/lock

  This removes the lock from the envelope or template. The X-DocuSign-Edit header must be included in the request. Additionally, an optional query string can be added to the request to resend the envelope.

Name	Reqd?	Type	Description
resend_envelope	No	Boolean	Optional setting, when true the envelope is sent to all recipients in the current routing order.

Example Request

```
DELETE https://{server}/restapi/{apiVersion}/accounts/{accountId}/envelopes/
{envelopeId}/lock?resend_envelope=true

X-DocuSign-Authentication:
<DocuSignCredentials><Username>{name}</Username><Password>{password}</Password><Integr
atorKey>{integrator_key}</IntegratorKey></DocuSignCredentials>
Accept: application/json
Content-Type: application/json

X-DocuSign-Edit = <DocuSignEdit><LockToken>{token from response}
</LockToken><LockDurationInSeconds>600</LockDurationInSeconds></DocuSignEdit>
```

Additional Response Information for Envelope Templates (added in February)

This change adds an optional query parameter that, when set, will return template matching information in the response when retrieving (GET) the list of templates in an envelope.

Name	Reqd?	Type	Description
include	No	String	The possible values are: • matching_applied – This returns template matching information for the template.

An example response, with include=matching_applied, is shown below.

Example Response

```
{
    "templates": [
        {
                "templateId": "string",
                "name": "string",
                "documentId": "string",
                "documentName": "string",
                "applied": "string",
                "templateMatch": {
```

```
                    "matchPercentage": "string",
                    "documentStartPage": "string",
                    "documentEndPage": "string"
                },
                "uri": "string"
            }
        ]
    }
```

Account Settings Updates (added in February)

This change adds two accountSettings:

Setting Name	Value	Authorization Required	Description
allowSharedTabs	Boolean	Admin	When true, the account allows users to share custom tags (fields). Note: This setting is only shown when getting account settings. It cannot be modified.
phoneAuthRecipientMayProvide PhoneNumber	Boolean	Admin	When true, senders can select to allow the recipient to provide a phone number for the Phone Authentication process.

Additional Response Information for Users (added in January)

This change adds the date and time a user was created to the basic response when retrieving (GET) a list of account users or information for a single user. Additionally, the create date and time is returned in the response when a user is added to an account.

SOAP API Changes

Envelope Tab Update

This change adds a new optional element for the Envelope – Tab.

Name	Schema Type	Description
RequireAll	Boolean	Optional element associated with *SharedTab* element (field markup). When true and *SharedTab* is true, information must be entered in this field to complete the envelope.

Documentation Change for RequestStatusChanges and RequestStatusCodes (added in January)

The text of the note in the RequestStatusChanges and RequestStatusCodes descriptions was updated to reflect that requests for status changes should not exceed 1 status request per unique envelope per 15 minutes as expressed in the DocuSign API Requirements Information Guide.

Bug Fixes

DocuSign Spring '15 Release Bug Fixes

The following bug fixes were deployed to the DocuSign Production environment as part of the DocuSign Spring '15 Release. The name-number is the internal DocuSign tracking number for the bug.

> **Important:** Issue numbers that are **bold underlined text** are externally reported bugs or customer commitments that were fixed in the release.

- **WAPP-4933:** When using the Classic DocuSign Experience web application bulk recipient feature user received an ambiguous error message when uploading a CSV file that had a blank header row entry. The error message related to this condition was updated.

- **WAPP-4934:** When using the Classic DocuSign Experience web application and opening the All Account Templates folder the system was timing out due to a large number of automatically generated templates. This issue is related to WAPP-4990.

- WAPP-4967: After completing signing using an Internet Explorer 8 browser, users were unable to download the documents.

- WAPP-4990: When using the Classic DocuSign Experience web application and trying to work with templates, customers were experiencing system time outs due to the system having to search through a large number of automatically generated templates. This issue was corrected by providing a way to disable the **Turn on Active Template Creation to create new templates as you work** user option (found in the Preferences – Template Matching options) on an account-wide basis. This issue is related to WAPP-4934.

- **WAPP-5005:** When using the Classic DocuSign Experience web application, users were receiving system error message when trying to delete a role from a template that was linked to a PowerForm. This issue is related to WAPP-5006.

- **WAPP-5006:** When using the Classic DocuSign Experience web application, users were receiving a system error message when trying to edit and save a template that was linked to a PowerForm. This issue is related to WAPP-5005.

- **WAPP-5025:** When using the Classic DocuSign Experience web application bulk recipient feature, users with memberships in multiple accounts were unable to use the feature if the feature was disabled in one of the user's other accounts.

- **SIGN-5100:** Envelopes using the Any Social ID authentication option would not advance to the signing experience for signers that successfully passed the check and were using an Internet Explorer 10 or 11 web browser.

- **SIGN-5127:** When using the new signing experience and clicking the Other Actions – View History option, the recipient information was not being displayed in the history.

- SIGN-5161: When using the version 1.1 email templates and sending from IBM Lotus Notes, the background color and image do not appear in the email.

- **SIGN-5210:** When field markup was enabled for a required field, a subsequent signer could delete the information and envelope would complete. Note, this issue was resolved with the addition of the **Require All** option for field markup.

- SIGN-5233: After completing signing, users received an error when trying to log on to their Facebook account.

- SIGN-5260: When using the new signing experience, after completing signing and trying download documents the download dropdown list text was being cut off.

- **SIGN-5447:** When using the new signing experience with an Internet Explorer 11 browser the Decline to Sign button was not functioning correctly.

- **SIGN-5495:** When using the new signing experience with accounts where the Topaz signature pad option was enabled, signers were being asked to sign with a signature pad even if one was not connected to their system.

- **SIGN-5560:** Updated envelope history event triggers to include when documents are downloaded or printed.

- SIGN-5632: When using the new signing experience with devices that allow entry from a touch screen or mouse, using a mouse for free-form signing was not working correctly.

- **SIGN-5671:** When signing a document that has formula fields in the new signing experience, the formula field values were not being updated.

- **PLAT-3447:** Completion emails were not being sent to all recipients when all of the recipients used the same email address, even if the recipients used different names.

- **PLAT-3459:** When sending documents using the SOAP API some anchor tags were not being applied to documents due to PDF formatting.

- **PLAT-3653:** When using the Classic DocuSign Experience web application with custom branding enabled SMTP bounce back messages were not being correctly shown in the envelope summary.

- CONNECT -12: In DocuSign Connect for Salesforce the QuickStart, QuickStart Two Tab, and DocuSign for Salesforce Real Time Quotes options were removed from the drop-down menu at the bottom of the page to prevent incorrect setups.

- **CONNECT-20:** When using DocuSign Connect for Salesforce to return documents to Salesforce, the document title was being changed if signer used the Sign On Paper option and the Connect settings for Attachments were Filename = Document Name remove extension + .pdf" and Contents = Document - one PDF per envelope.

- **API-1087:** When using the SOAP API to create a new account an error was received if the new account was created with a credit card and no account address was provided.

- **API-1262:** When using the REST API (v2) to update radio button group values, the updates were not being reflected in subsequent requests.

- **API-1381:** When using the SOAP API to create an envelope some radio buttons were being unselected when the envelope was viewed in the Classic DocuSign Experience web application due to two copies of the radio button being generated on a document page.

February Service Pack Bug Fixes

The following bug fixes were deployed to the DocuSign Production environment as part of February 6, 2015 Service Pack. The name-number is the internal DocuSign tracking number for the bug.

> **Important:** Issue numbers that are **bold underlined text** are externally reported bugs or customer commitments that were fixed in the Service Pack.

- **WAPP-4784:** When using the Classic DocuSign Experience web application to send documents from Box, some javascript code was being displayed when an envelope was being sent.

- WAPP-4862: Subject and Email merge fields were not working for some distributor plans.

- **WAPP-4866:** An administrative setting was incorrectly preventing customer administrators from importing templates.

- **WAPP-4901:** When using the Classic DocuSign Experience web application bulk recipient feature with an Internet Explorer browser the bulk recipient CSV file failed to load when creating or editing an envelope.

- **WAPP-4912:** When using the Classic DocuSign Experience web application bulk recipient feature to send from a template, the bulk recipient routing order changed after reassigning tags and changing routing order.

- **WAPP-4922:** When using the Classic DocuSign Experience web application bulk recipient feature with a template, users were getting system errors when clicking the Bulk Recipient icon.

- **WAPP-4936:** A user with membership in multiple accounts was unable to use the bulk recipient feature in an account where the feature was enabled if the feature was disabled in the user's default account.

- **WAPP-4942:** When using the Classic DocuSign Experience web application bulk recipient feature with a template, tags were being removed after envelopes were sent.

- **SIGN-2479:** When signing using a mobile browser on a Windows Phone the signing pages were not loading correctly and could not be scrolled.

- SIGN-5054: When using the Brand profile signing resource file to set brand color information, users were unable to change the header font color.

- **SIGN-5160:** When using the new signing experience with an Internet Explorer 8 browser the documents were being shown in a separate window that prevented signing.

- **SIGN-5201:** When using free-form signing with a Chrome browser the signer could not select tags to complete the signing process.

- SIGN-5261: Email messages where the recipient language was set to Korean were not fully localized.

- API-11: When using the REST API (v2) to add a radio button group in a composite template with a radio button selected, the set radio button selection was not being shown in the signing interface.

- API-125: When using the REST API (v2) to retrieve documents for an envelope marked as Authoritative Copy, the Envelope ID stamp was not being shown on the document PDFs.

- API-192: When using the REST API (v2) tags could not be added to an in-process envelope for a recipient that has not completed the envelope.

- API-446: When using the REST API (v2) recipients could not be changed from remote to embedded (captive) and vice-versa.

- API-852: When using the REST API (v2) to add multiple radio button groups and one radio button group is uses another as a conditional tag, the set radio button selection was not being shown and the conditional radio button group was not being shown.

- **API-906:** When using the Classic DocuSign Experience web application bulk recipient feature, if the bulk recipient was not the first recipient in the routing order an "envelope creation has been cancelled" error was being generated, but the envelopes were being sent correctly.

- API-939: When using the REST API (v2) to retrieve envelope information the results of an SMS Authentication check were not being included in the response.

- API-1007: When using the REST API (v2) to add phone numbers for SMS authentication in a composite template, the phone numbers were not being shown in the SMS authentication signing interface.

- **API-1094:** When using the bulk send feature in the Classic DocuSign Experience web application, the New DocuSign Experience web application, and the REST API, error messages were being generated and sending prevented if a CSV file field entry exceeded 100 characters in length.

January Service Pack Bug Fixes

The following bug fixes were deployed to the DocuSign Production environment as part of January 2015 Service Pack. The name-number is the internal DocuSign tracking number for the bug.

> **Important:** Issue numbers that are **bold underlined text** are externally reported bugs or customer commitments that were fixed in the Service Pack.

- WAPP-4602: When using the Classic DocuSign Experience web application, senders could not use the Correct option to add tags for the last recipient or newly added recipients if the last recipient did not have tags assigned when the envelope was originally sent.

- WAPP-4822: Improved error messages and handling when using the bulk recipients feature.

- WAPP-4845: When using the Classic DocuSign Experience web application, a brand profile could not be edited after uploading a resource file with incorrect formatting.

- SIGN-4652: When using PowerForms, if a signer exited out of signing without completing the PowerForm the button on the default landing page had that was supposed to return the signer to the PowerForm was inactive. The default landing page has been updated to remove the button.

- **SIGN-5054:** When using a Branding resource file with the new signing experience, changes to the Brand_Color_Background were not being reflected when signing with mobile devices.

- SIGN-5057: When using the Change Signer option during signing an error occurred if the combined length of note from the recipient changing the signer and the note from the sender exceeded 1000 characters. The change prepends the recipient's note to the sender's note and truncates the combined note to 1000 characters.

- **SIGN-5069:** When using a Branding resource file with the new signing experience, changes to the DocuSign_ConsumerDisclosure text were not being reflected when signing with mobile devices.

- FS-915: When using Connect for Salesforce, Salesforce Object Document attachment settings were not being saved after editing.

- **FS-934:** When using DocuSign Connect for Box, an error was being generated that prevented customers from editing or adding a DocuSign Connect for Box configuration.

- **PLAT-2835:** When using the Classic DocuSign web application senders were not able to see documents in Box folders during sending or viewing from the Manage tab.

- API-238: When using the SOAP API to send with ID Check, the IDCheckInformationInput information was being returned in the response when the ReceiveInResponse setting was false.

- API-883: When using the Classic DocuSign Experience web application bulk recipient feature envelopes could not be sent due to special characters in the bulk recipient csv file fields.

- API-894: When trying to import the DocuSign WSDL an internal port error caused the WSDL to not import into Visual Studio.

- API-931: When using the SOAP CreateEnvelopeFromTemplateAndForms without including PDFBytes in the Document node an incorrect error was being used.

- **API-949:** When using the Classic DocuSign Experience web application bulk recipient feature, data field tags that were blank (no entry) in the CSV file were being populated with data field tag information from a previous recipient.

- **API-975:** When using the Classic DocuSign Experience web application bulk recipient feature, CSV file data fields with Chinese Simplified, Korean, and Thai characters in the were not being displayed correctly during the signing process.