



Sending documents in bulk

Available only in the Enterprise edition

The bulk send and group bulk send options in Zoho Sign allow users to send multiple copies of documents to a combination of dynamic recipients and fixed recipients in their signature request at one go, saving organizations a great deal of time.

- The *bulk send* feature can be used in scenarios where the sender has one of dynamic recipients along with other fixed recipients in their signature request workflow. For example, consider an organization that wants their employees to sign the newly drafted policy document with a copy sent to their HR. Through the bulk send feature, the sender can have one dynamic list (the employee list) added to the signature workflow along with other static recipients, in this case, the HR. [Learn how to use bulk send](#)
- The *group bulk send* feature will be effective in scenarios where you have more than one dynamic recipient in your signature request along with other fixed recipients. For example, consider a scenario where an educational institution wants to collect signatures on a consent form from all their students and parents in bulk, where a copy of the consent form is sent to each student and their parent, which makes the entire recipient list dynamic. [Learn how to use group bulk send](#)

ⓘ ***This feature consumes 5 complimentary Zoho Sign credits ([Complimentary credits](#) are provided to organizations on a monthly basis subject to their complimentary credits limit) for every recipient from the list of recipients uploaded in bulk. Upon exhaustion, additional usage requires [Zoho Sign credits](#) purchased as add-ons.***



How to send documents to a bulk list of recipients

1. From your Zoho Sign dashboard, click **Send for signature** and upload the document or select one of the templates that you have created.
2. Click **Add bulk recipients**.
3. Upload your bulk recipients list saved in the CSV format. If you are unsure how to create one, you can download our sample csv file.
4. Once the CSV file has been uploaded, you can verify that the details are correct.

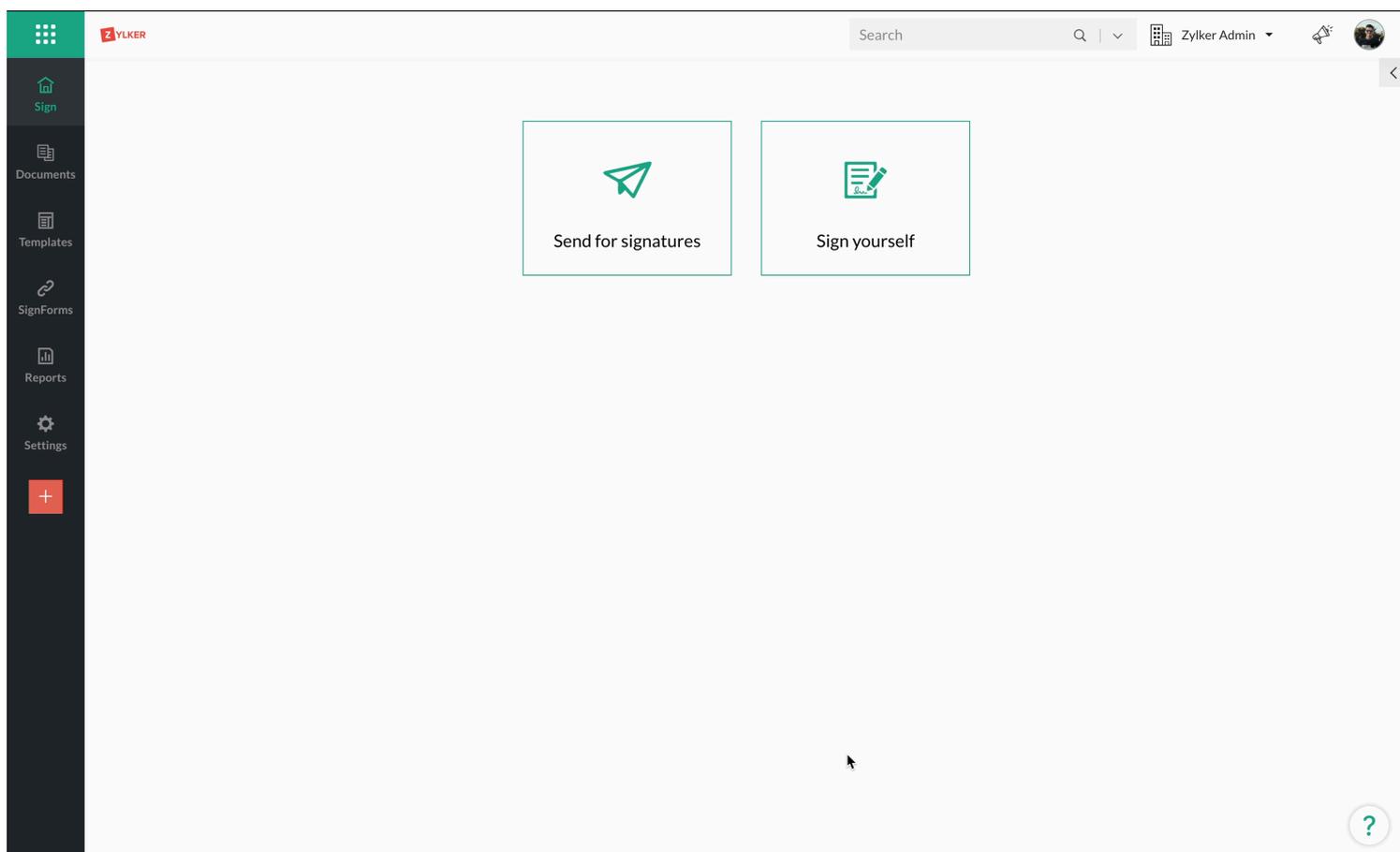
 **Your CSV file can contain a maximum of 1000 recipients.**

5. The recipient's email address and the recipient's name are mandatory fields. If you have additional data values present in the CSV file, they can be merged with the signer fields in your document where the data label of the field and the CSV column are the same. **Ensure that the data label format is the same at both instances.**
6. If needed, you can add more recipients to the same document workflow by clicking **+Add recipient**.
7. Once you are done with all the additional customizations, click **Continue**.
8. Once you are in the document viewer page, you can see the signer fields at the bottom-left corner.
9. Drag and drop a text field. Click the text field and change the data label to match the one in the CSV file. Once done, you can see a small text that says merged data.
10. Once all the fields are added, click **Send**.

How to send documents to a group of recipients

This feature only works for templates

1. From your Zoho Sign dashboard, click **Templates** from the left navigation pane.
2. Click +Create template, upload or import the document, enter the template and recipient details with their role. Learn more about Zoho Sign templates
3. Select the created template, select a particular recipient, then click **Add bulk recipients**.
4. Upload the CSV file that contains the recipient details.
5. The created template roles will be automatically appended in the dropdown from the bulk import recipients dialog.
6. Select the *role_email* and *role_name* based on the signer's role from the dropdown and click **Import**.



How to track the status of documents sent to bulk recipients

1. Place your cursor on **Documents** in the left side navigation pane and click Bulk Send from the dropdown.
2. Click the document that you would like to track from the list of documents displayed, and view the signing status for each recipient from the bulk list.

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