



Docusign

User Guide

Docusign config Steps

1. First we need to create a sandbox account on Docusign(developer account) and login successfully.
2. After that click on your profile and go to the admin section.

3. Click on the API and Keys Option for further process.



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4. After clicking on API and Keys you will see a pop-up where you have to enter your web URL whom with you want to create a connection.

i. **Link to privacy policy** :You have to enter your url with /privacy format.
example (http://Yourwebsite.com/privacy)

ii. **Link to Terms of use** :You have to enter your url with /privacy format.
example (http://Yourwebsite.com/terms)

Add API Integrator Key

App Description *
Testing Process

Link to Privacy Policy
http://twilio.outrightcrm.com/sau_fg/privacy
enter your web url with /privacy format

Link to Terms of Use
http://twilio.outrightcrm.com/sau_fg/terms
enter your web url with /terms format

☐ This is a mobile app.

ADD **CANCEL**

Integrator Key

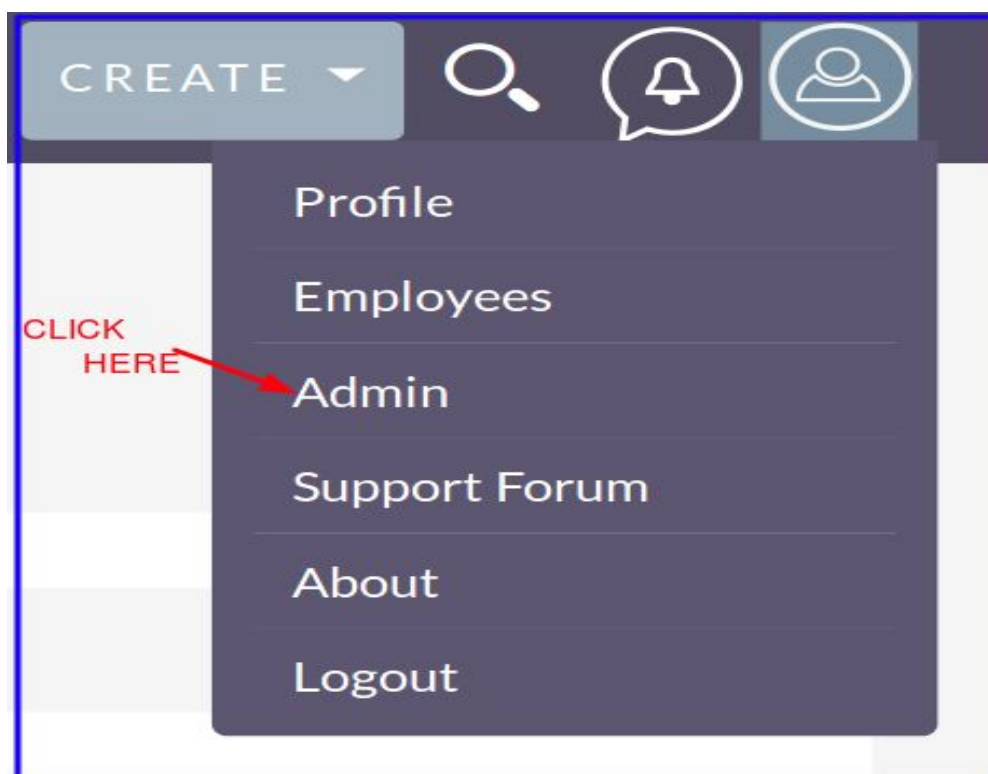
No Integrator Keys

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5. Copy the generated integrator key for further process

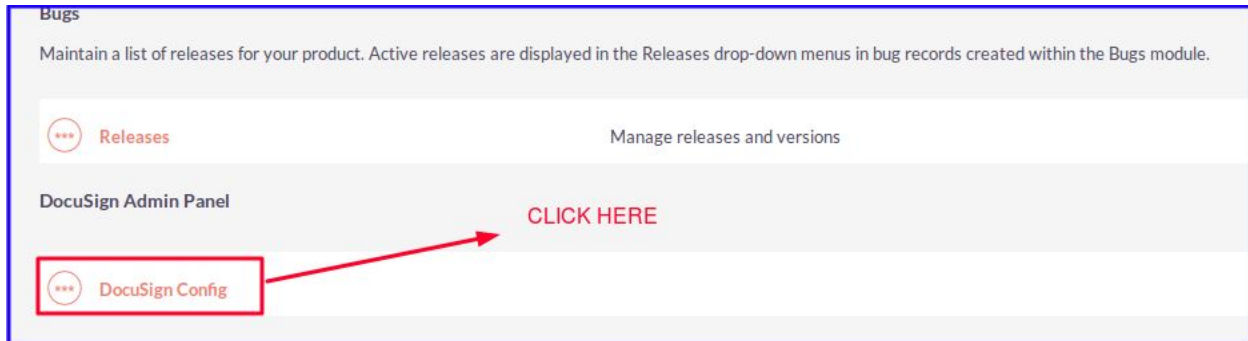
ADD APP / INTEGRATOR KEY	
App Description ^	Integrator Key
Testing Process	8e38c2b1-636b-469b-b8fa-9b708cf6017f

6. Go to your SuiteCRM and click the Admin section for further process.



DocuSign

7. Click on the DocuSign Config options.



8. We will enter that generated key in DocuSign config for the connectivity of CRM and DocuSign by clicking on store credentials button.

DocuSign Account Credentials

DocuSign Account Type:
Demo Account

Registered Email address of DocuSign
DocuSign Account Type:
ashish.negi+2@outrightcrm.com

Password
Password:
.....

Generated Integrator Key
Integrator Key
8e38c2b1-636b-469b-b8fa-9b708cf6017f

STORE CREDENTIALS

DocuSign

DocuSign Template

1. After creating connection, we will get templates in this module which is coming from DocuSign, we will select it and create a record.

BASIC

Name: Test

Assigned to: Administrator

Select Template: testing-Campaign (Template List of DocuSign)

Email Subject: Hi I am Testing

Email Message: Hi I am testing

SAVE CANCEL

2. After creating a record we will add some contacts whom we want to share documents for digital sign purpose, and we will choose the Send to all docuSign template for further process.

BASIC ACTIONS

SEND DOCUMENT SEPARATELY FOR EACH

Test

Assigned to: Administrator

testing-Campaign

Email Message: Hi I am testing

Hi I am Testing

Date Modified: 11/16/2018

11/16/2018

SEND ONLY ONE DOCUMENT FOR ALL (MULTIPLE SIGNATURE DOCUMENT)

DOCUSIGN DOCUMENTS

LEADS

Name	Referred By	Lead Source	Office Phone	Email	Lead Source Description	Assigned User
Create						

Test Test

ashish.negi@outrightcrm.com

Administrator

Edit