Docusign

User Guide

Docusign config Steps

1. First we need to create a sandbox account on Docusign(developer account) and login successfully.

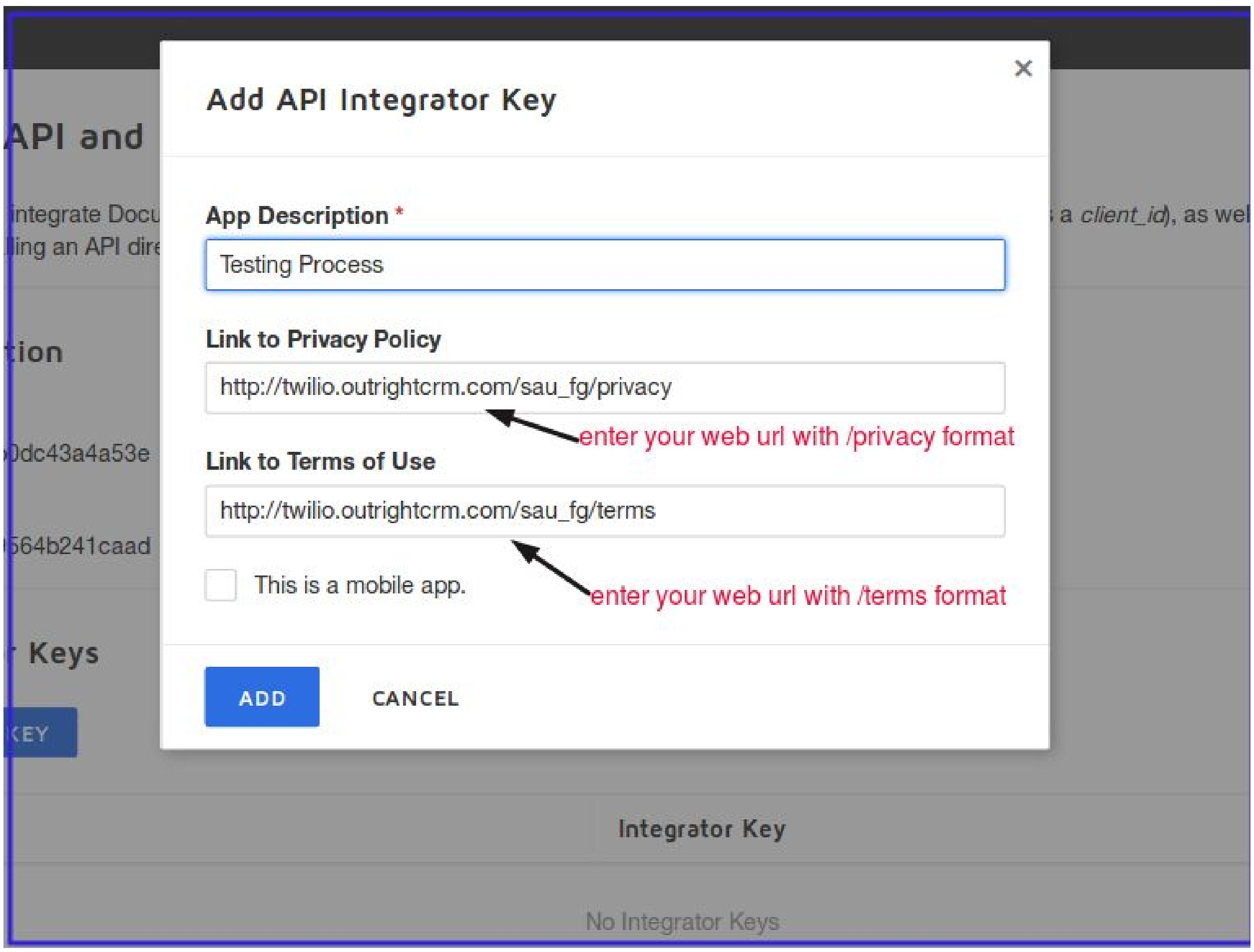
2. After that click on your profile and go to the admin section.

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

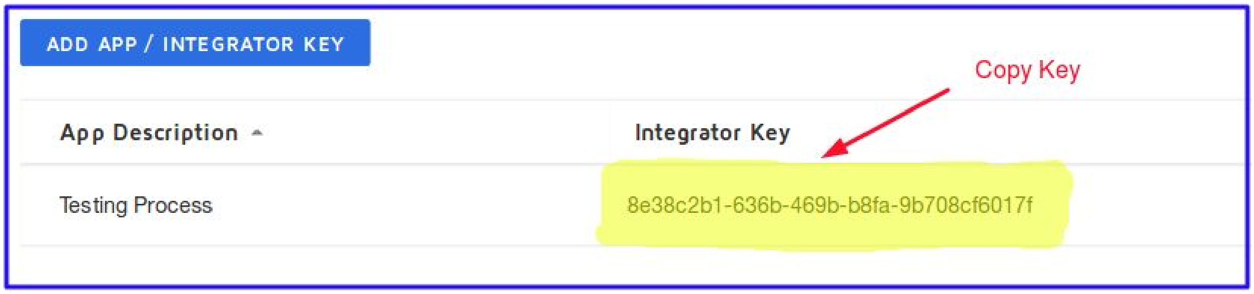
4. After clicking on API and Keys you will see a pop-up where you have to enter your web URL whom with you want to create a connection.

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

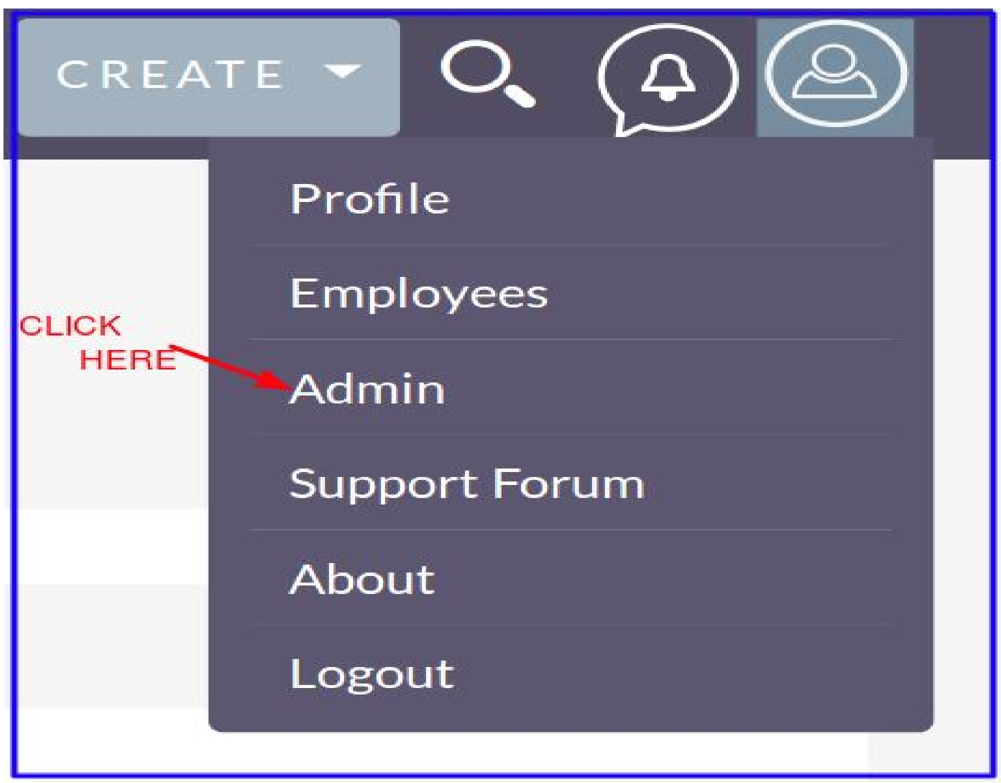
   ii. **Link to Terms of use** :You have to enter your url with /privacy format. **example (http://Yourwebsite.com/terms)**



5. Copy the generated integrator key for further process

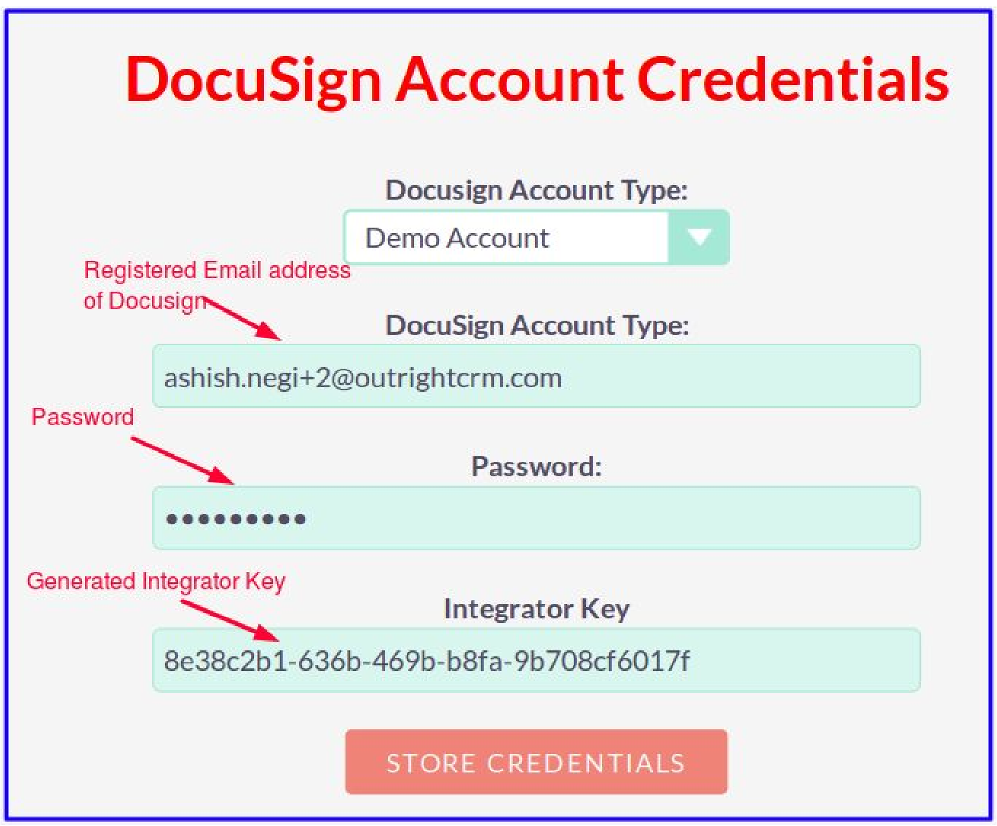


6. Go to your SuiteCRM and click the Admin section for further process.



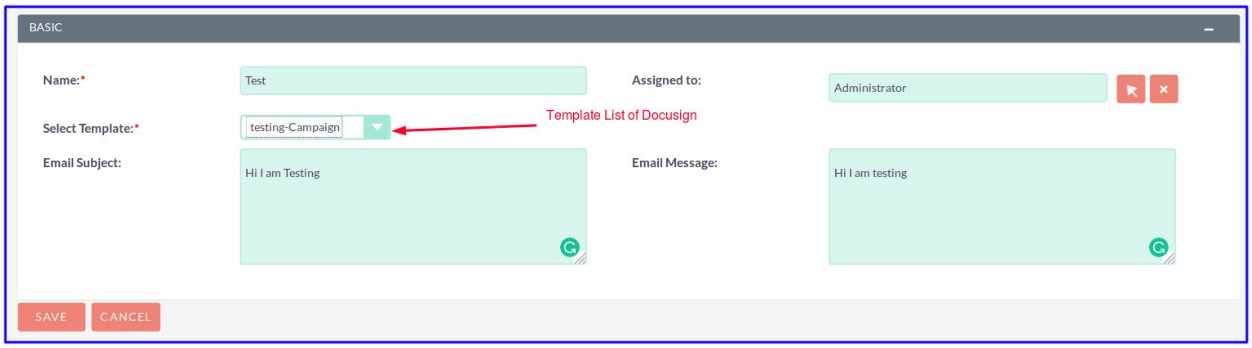
7. Click on the Docusign Config options.

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



DocuSign 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.



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.