SuiteCRM DocuSign Connector

# User Guide

Docusign Configuration 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.

Envelope Custom Fields

INTEGRATIONS

Connected Apps

Connect

API and Keys

Payments

AUDITING

CLICK HERE

Audit Logs

Bulk Actions

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

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

- **Link to Terms of use:** You have to enter your URL with /privacy format. **example (http://Yourthe website.com/terms)**
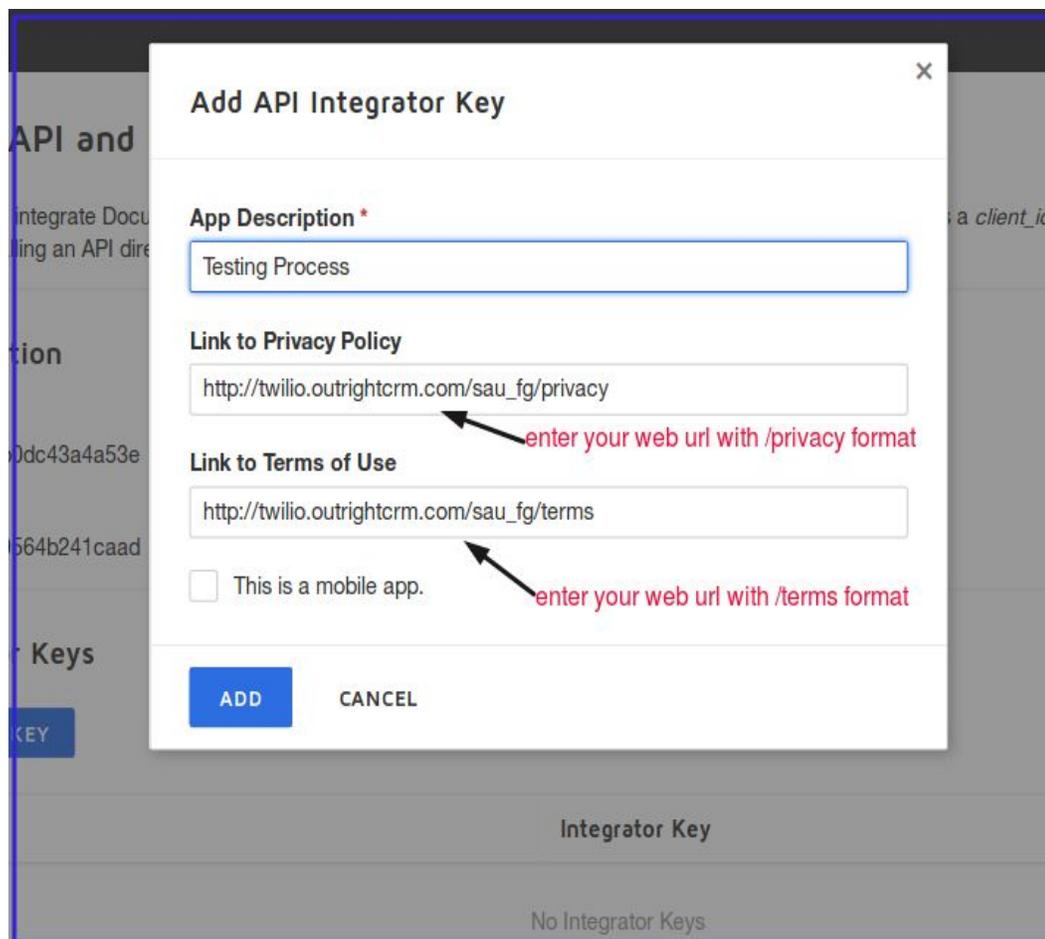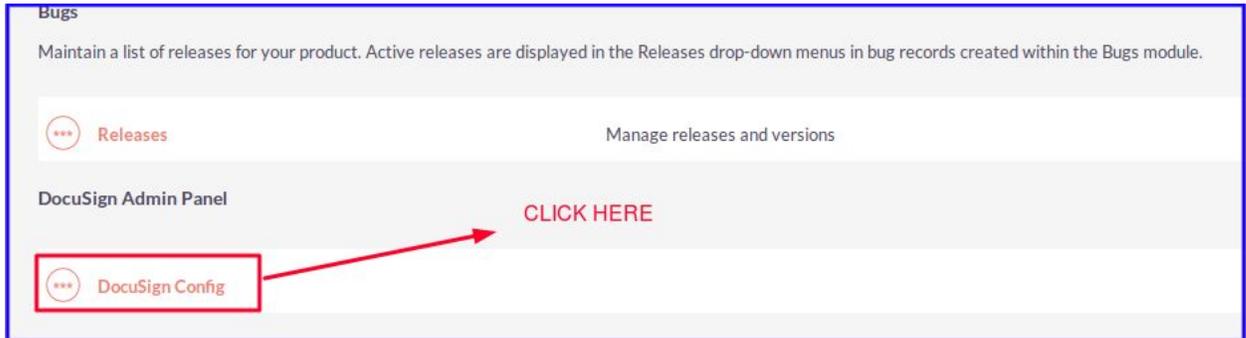
5. Copy the generated integrator key for further process
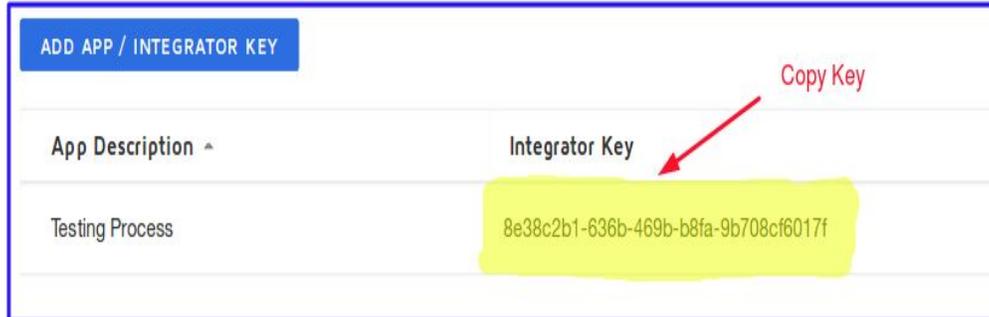
6. Go to your SuiteCRM and click the Admin section for further process.
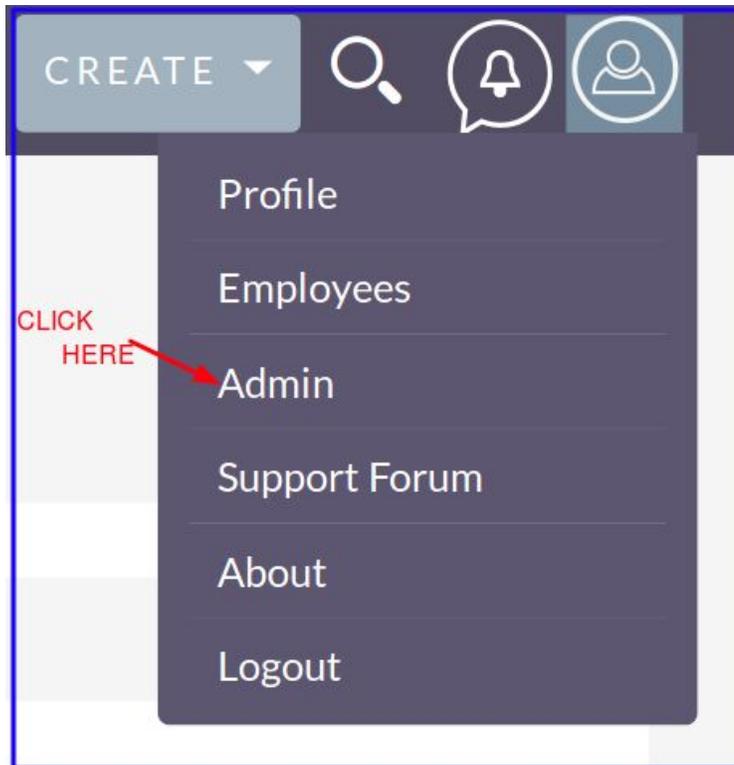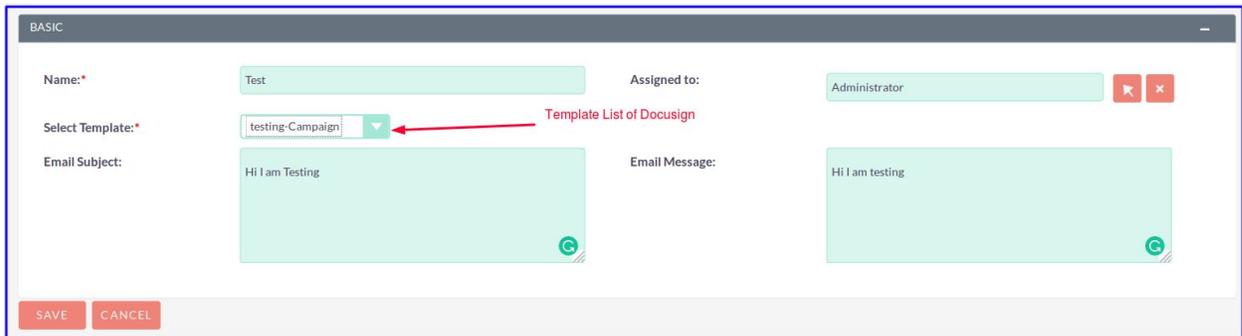
7. Click on the Docusign Config options.

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.