

SuiteCRM DocuSign Connector

User Guide

DocuSign Connector 1

Outright

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 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 (<u>http://Yourwebsite.com/privacy</u>)
 - Link to Terms of use: You have to enter your URL with /privacy format. example (http://Yourthe website.com/terms)

	Add ADL late system Key	×	
API and	Add API Integrator Key		
integrate Docu	App Description *		a client_id)
ling an API dire	Testing Process		
tion	Link to Privacy Policy		
	http://twilio.outrightcrm.com/sau_fg/privacy		
0dc43a4a53e	Link to Terms of Use		
	http://twilio.outrightcrm.com/sau_fg/terms		
564b241caad	This is a mobile app.		
' Keys KEY	ADD CANCEL		
	Integrator Key		
	No Integrator Keys		

5. Copy the generated integrator key for further process

	Сору Кеу
App Description 🔺	Integrator Key
Testing Process	8e38c2b1-636b-469b-b8fa-9b708cf6017f

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

CREATE - O				
	Profile			
CLICK	Employees			
HERE	Admin			
	Support Forum			
	About			
	Logout			

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 🔍				
Regist of Doc	ered Email address usign DocuSign Account Type:				
	ashish.negi+2@outrightcrm.com				
Password	Password:				
	•••••				
Generated I	Integrator Key				
8e38c2b1-636b-469b-b8fa-9b708cf6017f					
	STORE CREDENTIALS				

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.

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	
		C		G

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 DOCUMEN				
Edit	SEND DOCOMEN	I SEPARATELY FOR EACH			
Duplicate	Test	Assigned to:	Assigned to: Administrator		
Delete	testing-Campaign				
Find Duplicates Send DocuSign Template Separately	Hi I am Testing	Email Message:	Hi I am testing		
Send To All DocuSign Template	11/16/2018	Date Modified:	11/16/2018		
View Change Log	SENI	D ONLY ONE DOCUMENT FOR ALL (MULTIF	PLE SIGNATURE DOCUMENT)	
DOCUSIGN DOCUMENTS					
🛟 LEADS					-
Name 🕀 🛛 Referred By	🗧 🛛 Lead Source 🖨 🔹 Office Pho	one 🗧 Email	Lead Source Description	Assigned User 🕀	
Create				K < (1 - 1 of 1)	× ×
Test Test		ashish.negi@outrightcrm.com		Administrator	Edit 🚽