



Docusign

Overview

Docusign is an online platform for digital signature activities, it provides multiple options where we can share documents for single and multiple signatures.

Purpose

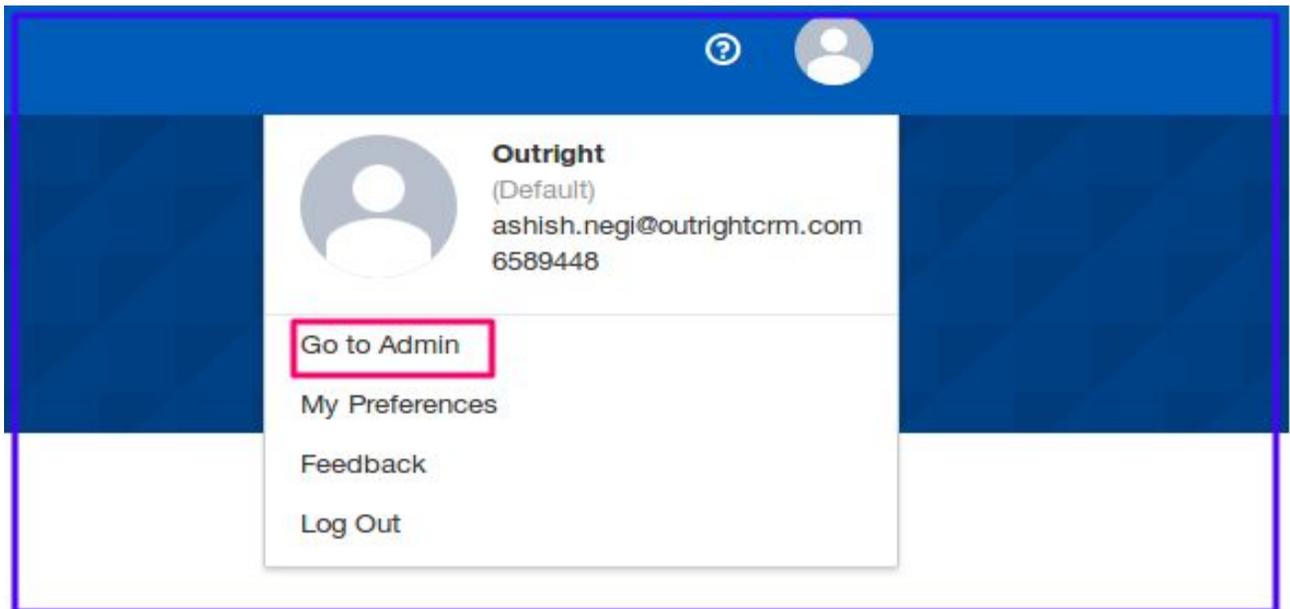
We are integrating API of docusign to use its functionality so we can send templates (documents which need to be signed) to our CRM contact's and can see their status as well.

DocuSign SugarCRM Integration

First we need to configure the settings of docuSign from below mention options.

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.

The screenshot displays the Docusign Account Profile page. On the left is a sidebar menu with categories: ACCOUNT PROFILE, USERS AND GROUPS, SIGNING AND SENDING, and INTEGRATIONS. The 'API and Keys' option is highlighted with a red box. The main content area is divided into three sections: Usage, Billing Information, and Billing History. The Usage section shows 'Envelopes' at '3/Unlimited' with a 'View Usage Details' link. The Billing Information section includes 'Billing Terms' (Purchase Order), 'Current Billing Period' (September 19, 2018 - October 19, 2018), and 'Next Payment Due' (October 19, 2018). The Billing History section has a table with columns for Date, Action, and Transaction #. The Plan section on the right shows a user profile for 'DEVELOPER' with Account ID: 6589448.

ACCOUNT PROFILE

- Security Settings
- Regional Settings
- Brands
- Classic Preferences
- System Updates

USERS AND GROUPS

- Users
- Permission Sets
- Groups

SIGNING AND SENDING

- Signing Settings
- Sending Settings
- Email Preferences
- Custody Transfer
- Document Retention
- Legal Disclosure
- Reminders and Expiration
- Comments
- Document Custom Fields
- Envelope Custom Fields

INTEGRATIONS

- Connected Apps
- Connect
- API and Keys**

Usage

Envelopes 3/Unlimited

[View Usage Details](#)

Plan



DEVELOPER
Account ID: 6589448

Billing Information

Billing Terms
Purchase Order

Current Billing Period
September 19, 2018 - October 19, 2018

Next Payment Due
October 19, 2018

Billing History

Date	Action	Transaction #
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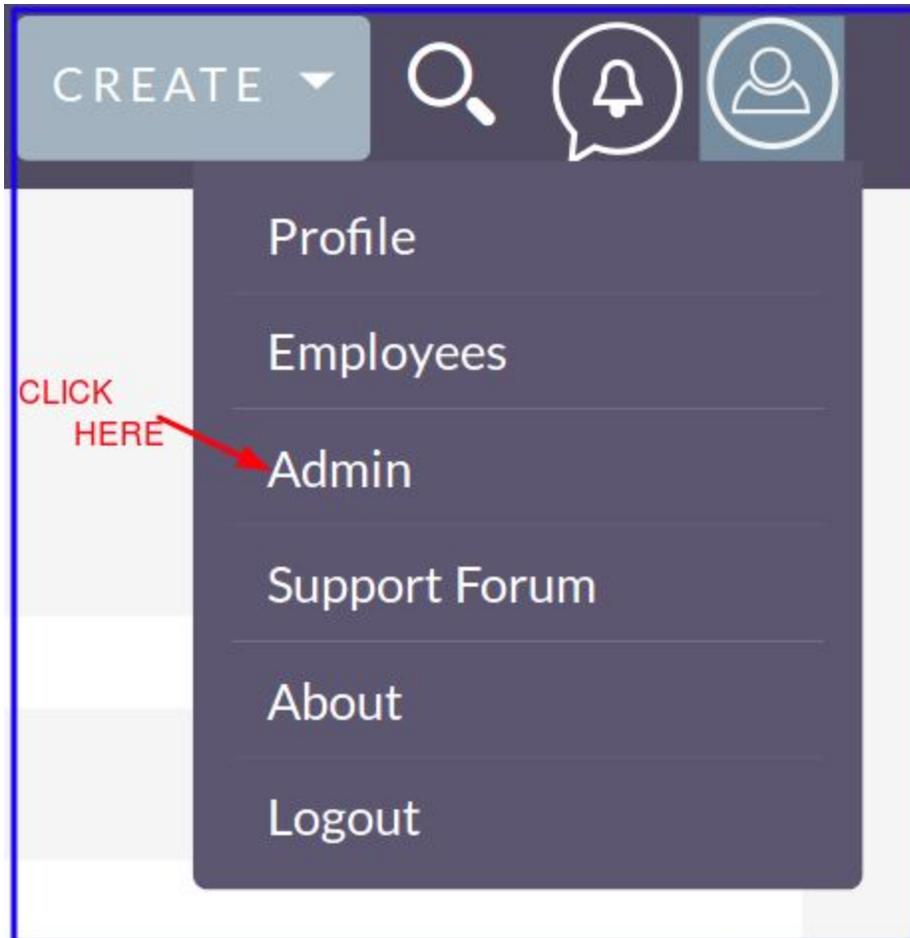
Payment Information

Payment Method: Purchase Order

4. We have to select API and Keys option to generate the key for connectivity process.

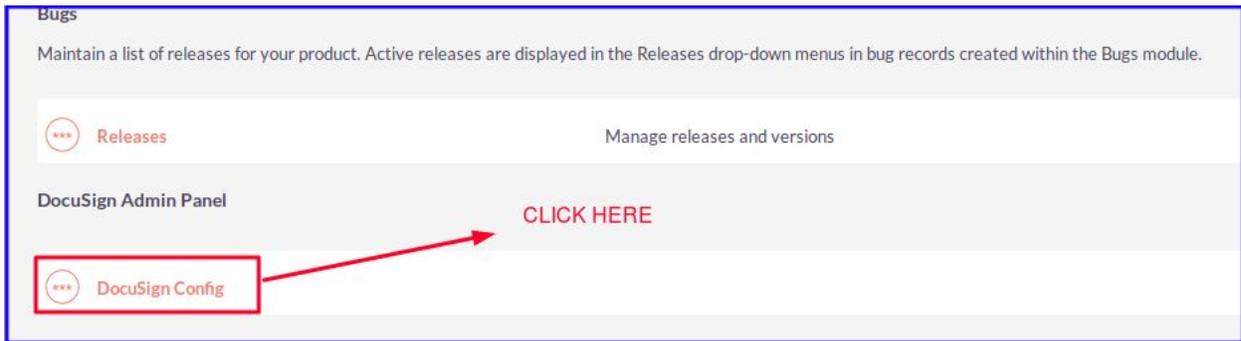
App Description	Integrator Key	Status	
Ashish321	711a7c46-a947-43f9-8560-4ff7613849c8	● Demo	ACTIONS ▾

5. Go to your Admin section for further process.



DocuSign

6. Click on the DocuSign Config options.



DocuSign

7. 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

The image shows a form titled "DocuSign Account Credentials" with four input fields. The first is a dropdown menu for "DocuSign Account Type" with "Demo Account" selected. The second is a text field for "DocuSign Account Type" containing "ashish.negi+2@outrightcrm.com". The third is a password field with "Password:" above it and "....." inside. The fourth is a text field for "Integrator Key" containing "8e38c2b1-636b-469b-b8fa-9b708cf6017f". A red button labeled "STORE CREDENTIALS" is at the bottom. Red arrows point from text labels to each of the four input fields.

DocuSign Template

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

The screenshot shows a 'BASIC' form with the following fields and values:

- Name:** Test
- Assigned to:** Administrator
- Select Template:** testing-Campaign (indicated by a red arrow and the label 'Template List of DocuSign')
- Email Subject:** Hi I am Testing
- Email Message:** Hi I am testing

At the bottom of the form, there are two buttons: 'SAVE' and 'CANCEL'.

DocuSign

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

The screenshot displays the DocuSign interface. At the top, there are tabs for 'BASIC' and 'ACTIONS'. The 'ACTIONS' menu is open, showing options: Edit, Duplicate, Delete, Find Duplicates, Send DocuSign Template Separately, Send To All DocuSign Template, and View Change Log. A red arrow points from the 'Send To All DocuSign Template' option to the 'SEND ONLY ONE DOCUMENT FOR ALL (MULTIPLE SIGNATURE DOCUMENT)' text. Another red arrow points from the 'Send DocuSign Template Separately' option to the 'SEND DOCUMENT SEPARATELY FOR EACH' text. The document details are as follows:

Test	Assigned to:	Administrator
testing-Campaign		
Hi I am Testing	Email Message:	Hi I am testing
11/16/2018	Date Modified:	11/16/2018

Below the document details is a table for 'DOCUSIGN DOCUMENTS' and a 'LEADS' table. The 'LEADS' table has columns: Name, Referred By, Lead Source, Office Phone, Email, Lead Source Description, and Assigned User. The first row shows 'Test Test', 'ashish.negi@outrightcrm.com', and 'Administrator'. There is also a 'Create' button and a '1 - 1 of 1' indicator.