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 it's functionality so we can send templates (documents which need to be signed) to our CRM contact's and can see their status as well.

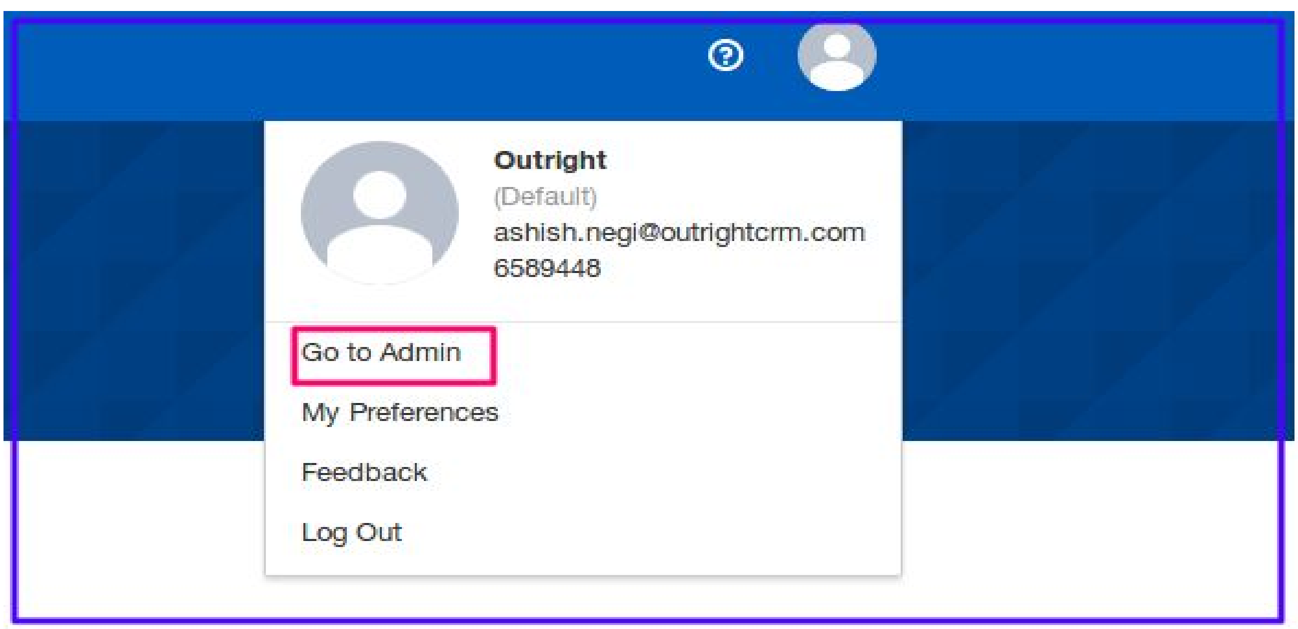
DocuSign SugarCRM Integration

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

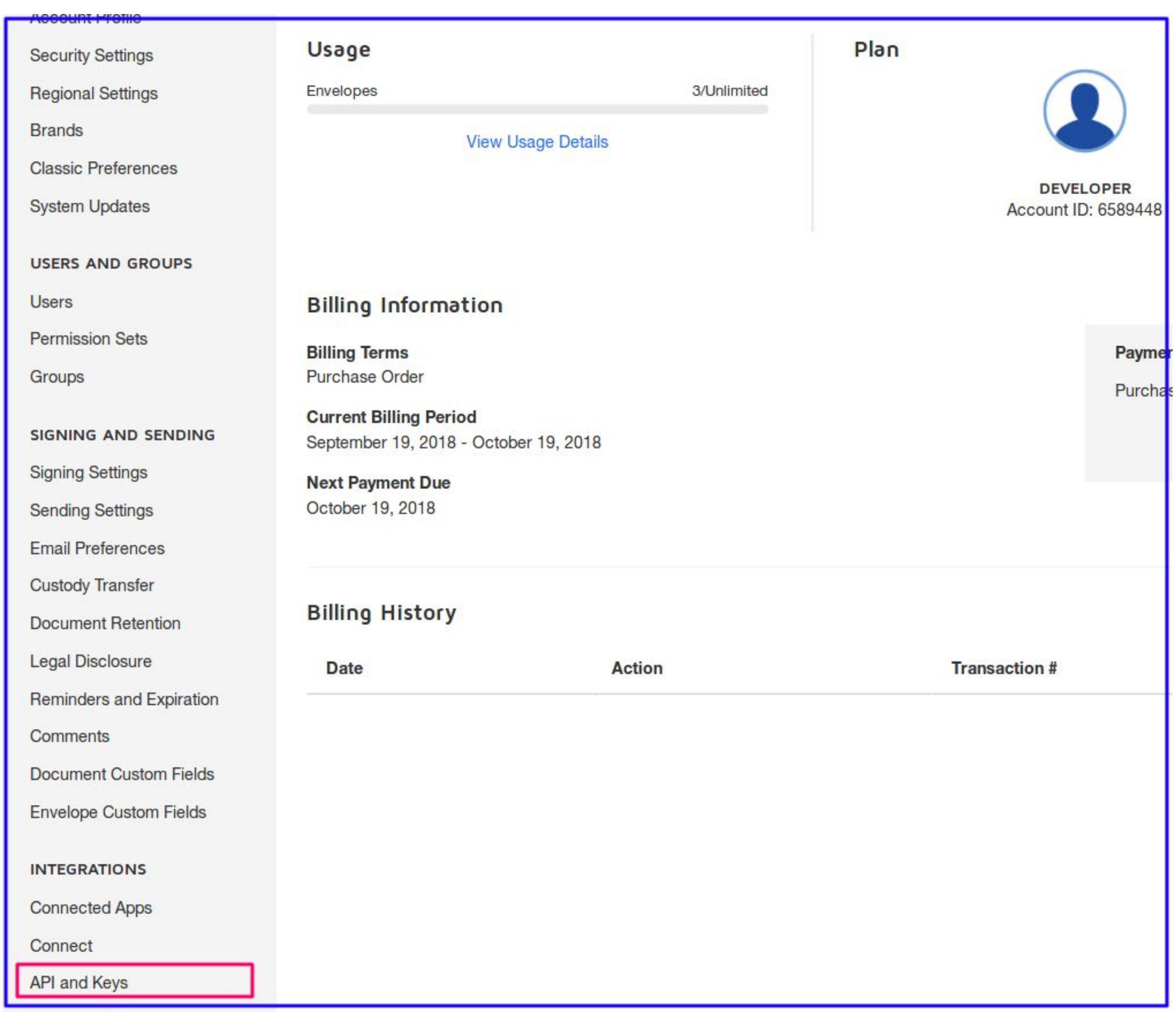
Docusign config Steps

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.

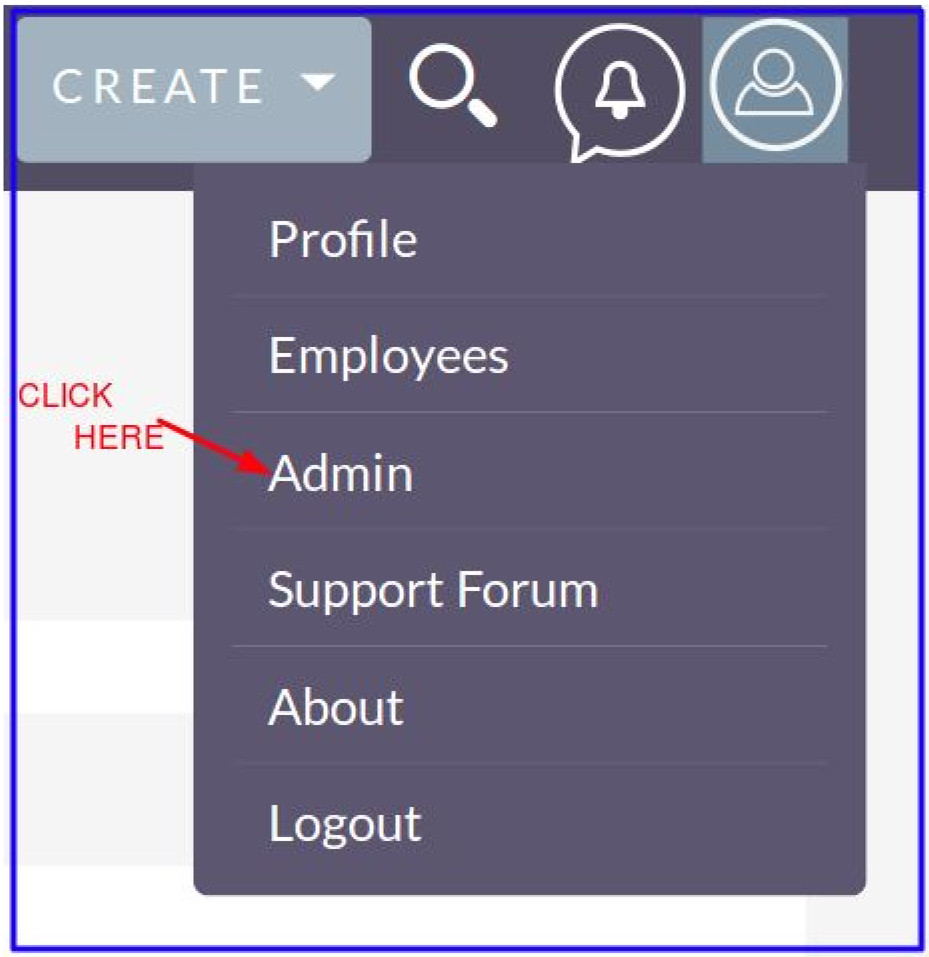


3. Click on the API and Keys Option for further process.



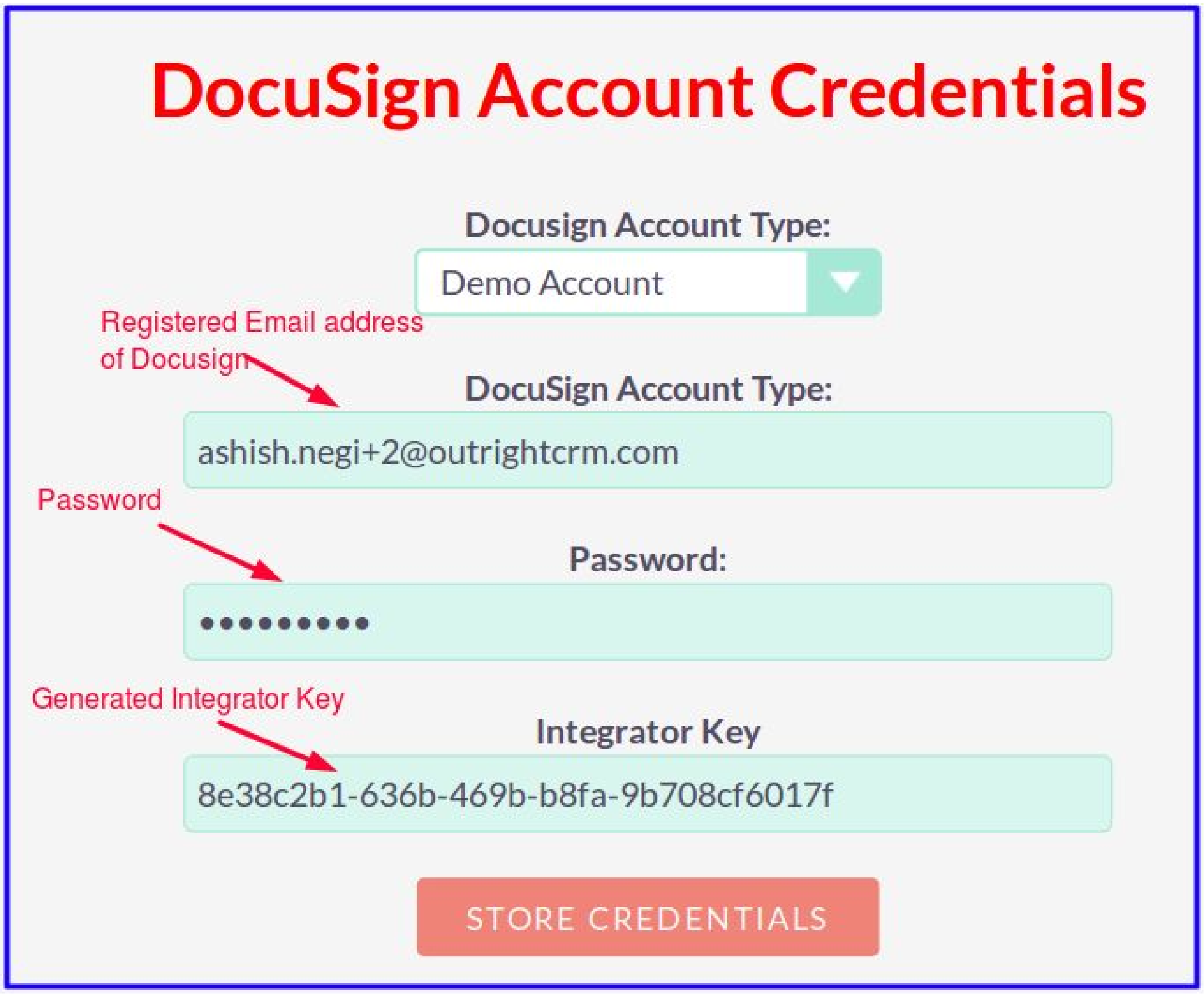
4. We have to select API and Keys option to generate the key for connectivity process.

5. Go to your Admin section for further process.



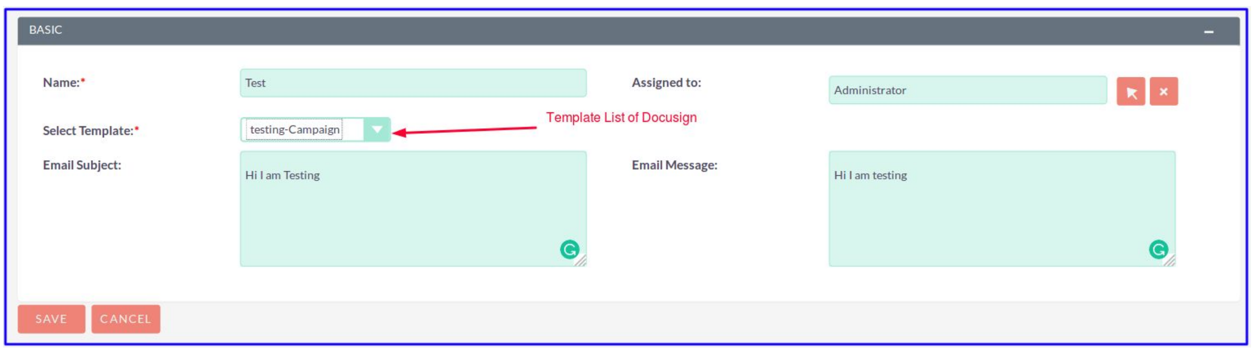
6. Click on the Docusign Config options.

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



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.



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.