
W-Systems Sugar Connector to DocuSign User Guide

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W-Systems Sugar Connector to DocuSign User Guide

Overview

The W-Systems Sugar Connector to DocuSign lets users send documents for electronic signature and view the signed documents attached to the originating record in Sugar.

This guide covers how administrators and users can engage with the Sugar Connector to DocuSign after it has been installed to your Sugar instance. For more information on installing the Sugar Connector to DocuSign, please refer to the [W-Systems Product Installation Guide](#). For information on activating the package, please refer to the [Sugar Connector to DocuSign Administration](#) section of this page.

Note: This guide pertains to the latest release of the W-Systems Sugar Connector to DocuSign. If you are not using the latest version, then you may not have access to some of the features listed on this page. Please refer to the [W-Systems Supported Platforms](#) page for more information on the latest package versions.

Features

Increase Productivity

Sending a document for electronic signature is simple using DocuSign for Sugar. Just drag and drop the DocuSign dashlet on any object, including custom objects, and click the "Send with DocuSign" button. The DocuSign dashlet is included by default on the Account, Contact, Lead, Opportunity, and Quote modules. Then, use the familiar DocuSign interface to specify recipients, define signing workflow, edit tags, and send the envelope from Sugar. View real-time updates on the status of DocuSign envelopes, and view signed documents automatically attached back to the originating record in Sugar.

Increase Revenue

Designed for sales, there's nothing new to learn with DocuSign. Documents are auto-routed to the right people, with reminders and expiration times. Decision-makers can review & approve a contract within minutes. Signed agreements are legally binding & backed by a court-admissible audit trail DocuSign warrants compliance with the December 1999 Federal E-SIGN Act, which established a Community framework for the use of electronic signatures on electronic contracts

in the United States. DocuSign's advanced signature is ready and legal to accelerate the speed of business.

Gain More Control and Visibility into The Process

DocuSign provides an audit trail of edits and notifies every signer when a contract is changed. This helps streamline a negotiation, reduce errors, shorten the sales cycle, and lower costs. With DocuSign, you see in real-time who has received, reviewed, and signed a contract.

Take Advantage of Customization Opportunities

DocuSign is a platform designed and built for flexibility. DocuSign can be easily configured or customized to integrate with nearly any business process. DocuSign ships a complete set of APIs along with documentation and a world-class SDK to make extending any workflow a breeze.

Sugar Connector to DocuSign Administration

- [DocuSign Connector Settings](#)
- [Recipient Selection Behavior](#)
- [DocuSign Sweeper Job](#)
- [DocuSign Queue](#)

DocuSign Connector Settings

After installing the Sugar Connector to DocuSign, navigate to the Sugar Admin page, scroll down to the "DocuSign" section and click on "DocuSign Settings".

DocuSign

Manage settings for the DocuSign for SugarCRM connector.

 DocuSign Settings	Configure DocuSign settings
 DocuSign envelope recovery	List of the envelopes in DocuSign which are not saved in Sugar

Sugar will display the DocuSign Settings page where the admin can configure the following settings:

- **API Environment:** Select "Production" from the API Environment dropdown.
Note: If you are using a DocuSign Developer Account for testing or development, select "Demo" from the API Environment dropdown. If you

are not using a Developer Account and would like more information about obtaining one, please visit the DocuSign Developer Center at <https://developers.docusign.com> to get started.

- **Integrator Key:** This field is filled in by default (please leave this as-is).

Integrator Key:

WSYS-b80b7334-341b-4314-84fd-471addc4d608

- **Log Level:** Logging can be used to aid in troubleshooting issues that might occur with this package. There are three (3) logging levels options:
- **Fatal:** This level logs any errors that forced a shutdown of the service or application to prevent data loss (or further data loss). This is only used where situations exist that could have caused data corruption or loss.
- **Error:** Any error which is fatal to the operation, but not the service or application (i.e., cannot open a required file, missing data, etc.). These errors will force user (administrator, or direct user) intervention. These are usually reserved for incorrect connection strings, missing services, etc.
- **Debug:** Information that is diagnostically helpful to more than just the developers (i.e., support techs, IT staff, system admins, etc.).
- **Logging Location:** The errors will be logged in SugarCRM file located at `custom/docusign/sugarcrm.docusign.log`
- **Recipient Selection Behavior:** The available options are:
 - **Display list of potential recipients:** A list of potential recipients is opened for the user to select from by using checkboxes and the Select button.
 - **Do not use show potential recipients:** The list of recipients will not be displayed and the following DocuSign actions are disabled: "Quick Send with DocuSign" action from Documents subpanel, "Quick" and "Use Template" actions from DocuSign dashlet. A warning message will be displayed. Instead, the "Send with DocuSign" action from Documents subpanel or "Send" action from DocuSign dashlet can be used in order to send documents. The recipients can be chosen only from the DocuSign drawer once this is opened.
 - **Remove all DocuSign Envelope Status Records:** This action will remove all DocuSign envelopes and DocuSign Notes.

Remove all DocuSign Envelope Status Records

Remove DocuSign login information for all users

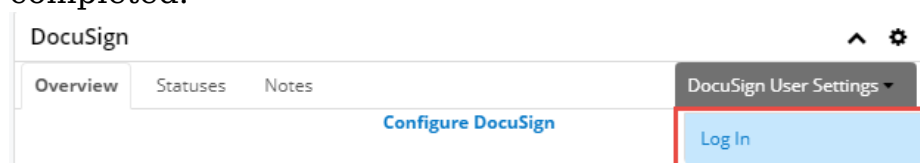
- **Remove DocuSign Login Information for All Users:** This action will log out all DocuSign users.

Remove all DocuSign Envelope Status Records

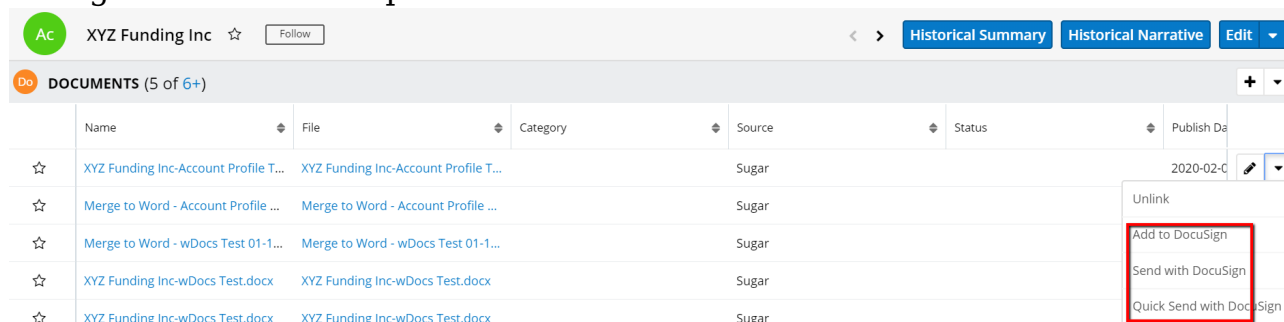
Remove DocuSign login information for all users

Note: For first-time users, the "**Remove...**" buttons do not need to be used. However, these two buttons can be used to clear user data in Sugar as required. If this is the case, click the **Remove all DocuSign Envelope Status Records** and/or the **Remove DocuSign Login Information for All Users** button(s) and the cleanup takes place when the **Save** button is clicked.

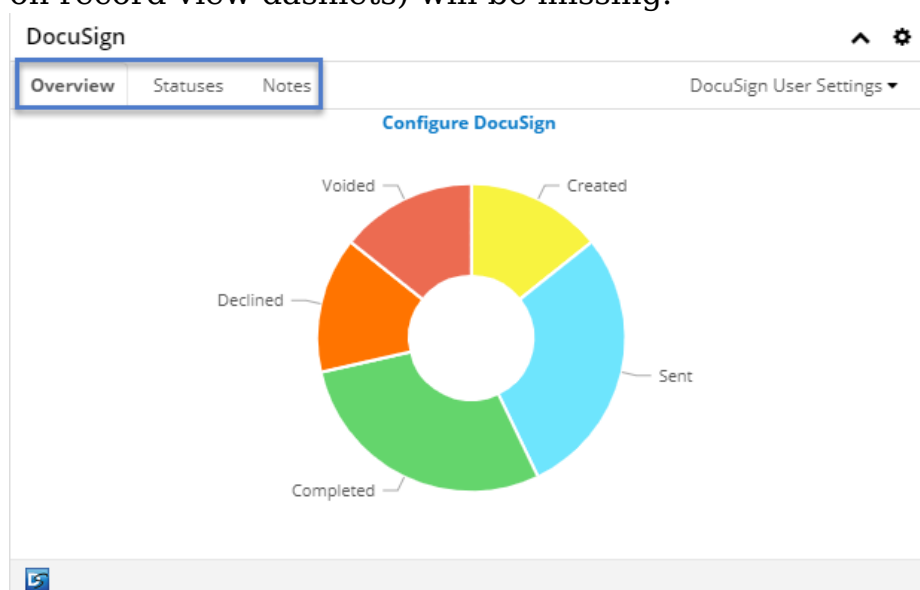
The admin user can Log In from a DocuSign dashlet after the configurations are completed.



Note: The "**Add to DocuSign**", "**Send with DocuSign**" and "**Quick Send with DocuSign**" options will be available on the Documents subpanel only after the configurations are completed.



When the DocuSign user is not logged in, the "**New envelope**" tab (available only on record view dashlets) will be missing.



Recipient Selection Behavior

To configure recipient selection behavior, navigate to Admin > DocuSign Settings.

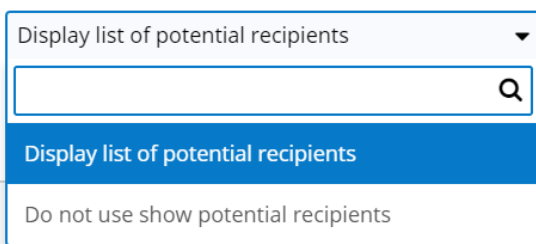
DocuSign

Manage settings for the DocuSign for SugarCRM connector.

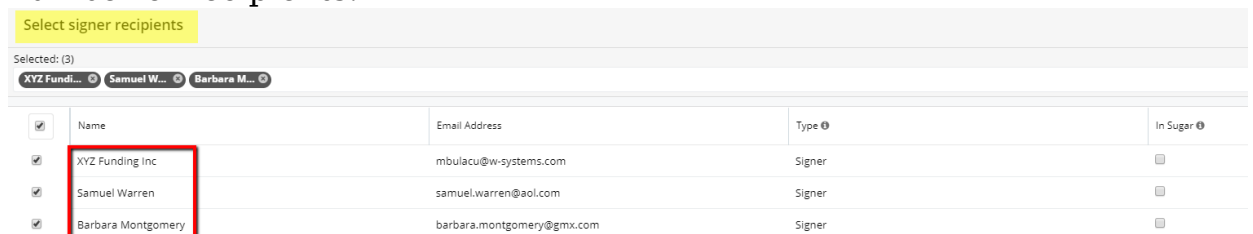


From the "Recipient Selection Behavior" dropdown field users can choose between two behavior options:

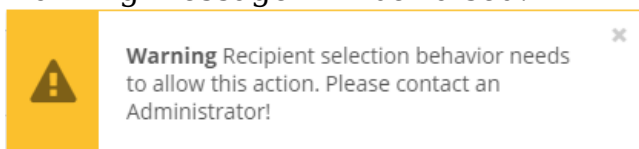
Recipient selection behavior:



- **Display list of potential recipients.** By setting the behavior to this option, a list of potential recipients will always be opened, regardless of the number of recipients.



- **Do not use show potential recipients.** By changing the behavior to this option, the list of potential recipients will never be opened, regardless of the number of available recipients.
 - When enabled, the following DocuSign actions will be disabled: the "Quick Send with DocuSign" action from documents subpanel, and the "Quick" and "Use Template" actions from DocuSign dashlet. A warning message will be raised.



- When enabled, the "Send with DocuSign" action from the Documents subpanel and the "Send" action from DocuSign dashlet can be used to send documents. The recipients can be chosen only from the DocuSign drawer once it opens.

DocuSign Sweeper Job

The status of the envelope uploaded to DocuSign is updated by the DocuSign Sweeper Job scheduler. The scheduler is automatically created once the package is installed, set to "Active", and it will run once a day at 12:00 am. For more information on scheduled jobs in Sugar, refer to the [Schedulers](#) documentation.

DocuSign Queue

The Queue page can be accessed from the DocuSign section on the Sugar Administration page.

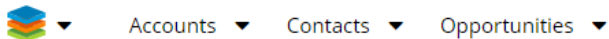
DocuSign

Manage settings for the DocuSign for SugarCRM connector.



The Queue page shows the envelopes that will be checked when the [DocuSign Sweeper Job](#) runs. The table status at certain moments can be seen on this page.

Queue with no records:



DocuSign Queue

No envelopes in queue.

Queue with records:

DocuSign Envelopes Queue

Clear Queue		Date entered	Envelope subject
		2017-02-17 13:29:08	MERGE Field-undefined 1/17/2017, 9:36:06 AM - DOCUSIGNED - DOCUSIGNED - DOCUSIGNED.pdf

Using the Sugar Connector to DocuSign

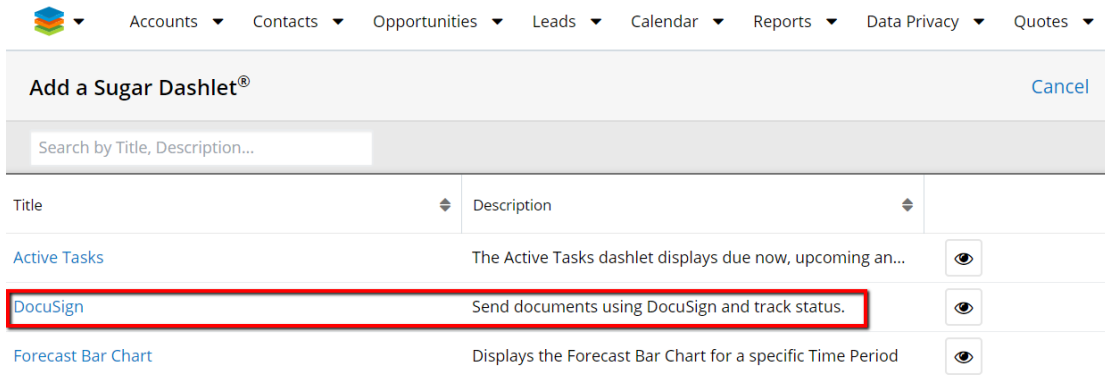
- [DocuSign Dashlet](#)
 - [User Settings](#)
 - [Tabs](#)
 - [Chart](#)
- [Notifications](#)

- [Adding a Related Contact as Recipient](#)
- [DocuSigned Document](#)
- [DocuSign Envelope and Audit](#)
- [Resend Envelopes](#)
- [In-Session Sending Experience](#)
- [Quick Send with DocuSign](#)
- [Template Mapping of Recipients](#)
- [DocuSign Envelopes Recovery](#)
- [Sending Documents Merged With wDocs to Signature](#)

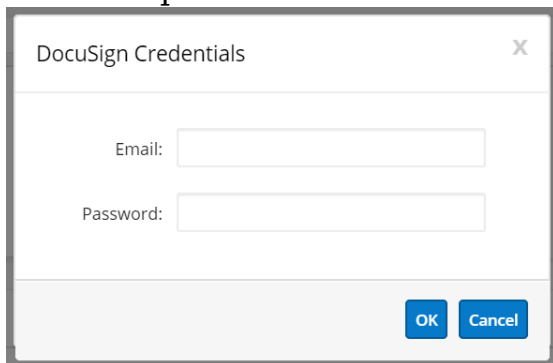
DocuSign Dashlet

To send documents with DocuSign, users must add the DocuSign Dashlet to the record view dashboard.

1. Navigate to the desired record view dashboard and follow the instructions for your Sugar version to [add a new dashlet](#). Select the "DocuSign" dashlet when prompted.

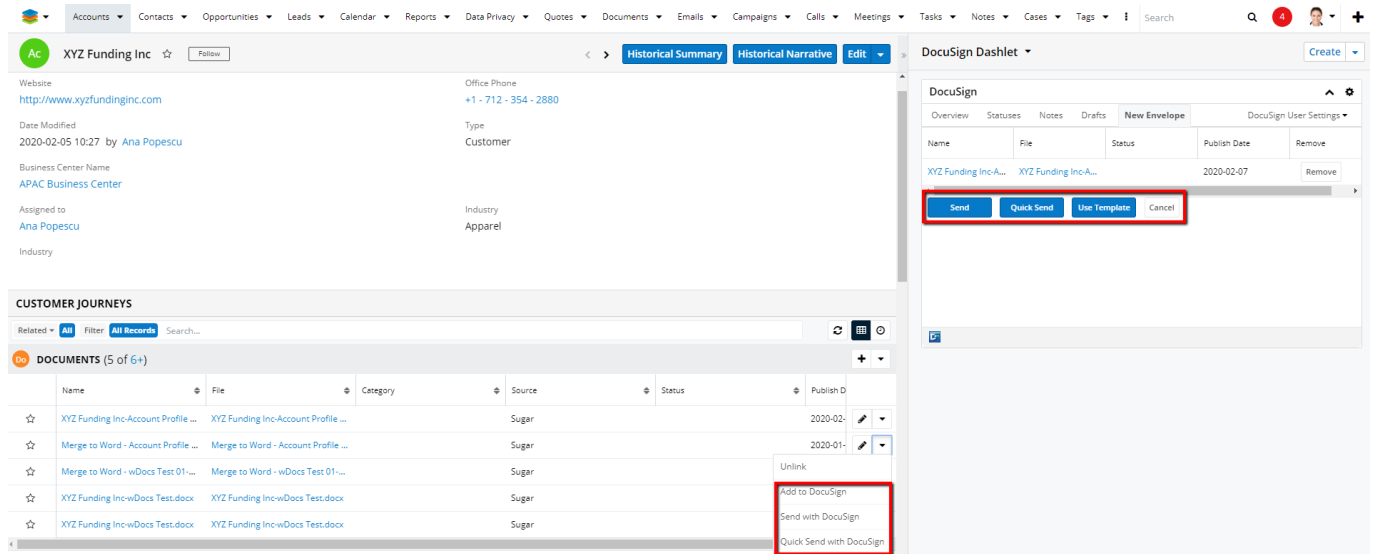


2. Save the dashboard with your new dashlet.
3. On the dashlet, click on "Configure DocuSign" and the DocuSign Credentials page will open. Enter your DocuSign username and password and then press "OK".



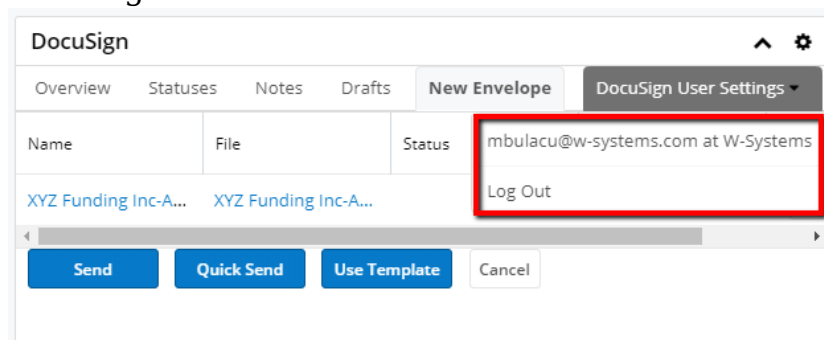
Now you can send envelopes with DocuSign by using the dashlet. If the DocuSign dashlet is not installed on the current dashboard in Record View, the DocuSign

actions will still be available on the Documents subpanel as long as the DocuSign user is connected:



DocuSign Dashlet User Settings

The "DocuSign User Settings" menu is available at the top-right menu of the DocuSign dashlet.



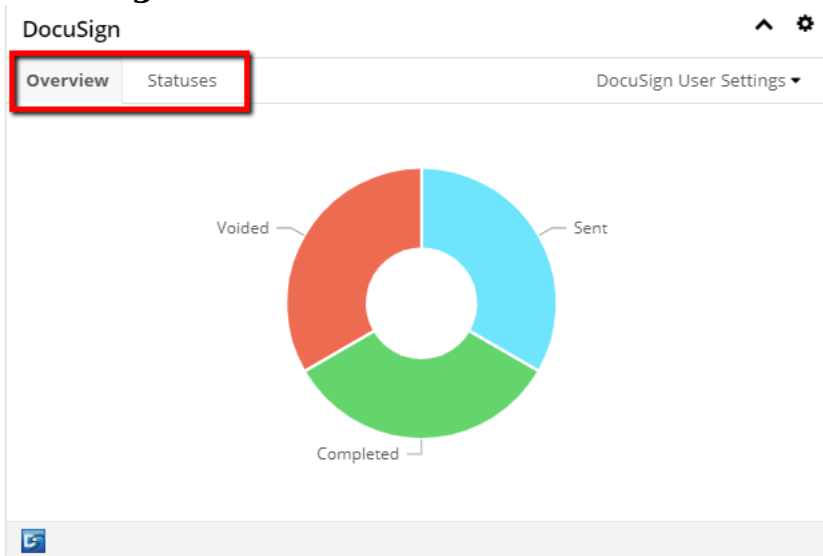
The DocuSign User Settings menu has the following options:

- **[Current User]:** The user currently logged in will be displayed along with their email address.
- **Log Out:** This option will disconnect the current user.
- **Switch Accounts:** This third option will only be available in the menu for users with multiple accounts for the email address.

DocuSign Dashlet Tabs

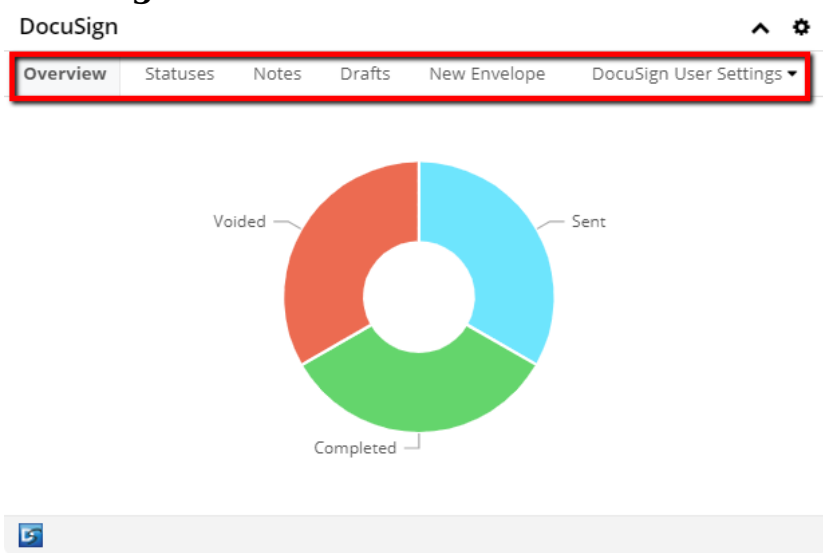
Users can observe different tabs at the top of the DocuSign dashlet for each view: Home, List View, and Record View.

DocuSign Dashlet tabs in Home screen and List Views:



- **Overview:** includes the general [DocuSign Chart](#) and a counter for each status.
- **Statuses:** includes all envelopes added to DocuSign, together with the details associated with each envelope (Date Created, Created By, Subject, Status).

DocuSign Dashlet tabs in Record Views:



- **Overview:** includes the general [DocuSign Chart](#) and a counter for each status.
- **Statuses:** includes all envelopes added to DocuSign, together with the details associated with each envelope (Date Created, Created By, Subject, Status).
- **Notes:** includes a Note for each envelope status.

DocuSign

Overview Statuses **Notes** Drafts New Envelope DocuSign User Settings

Date Created	Name	Created By
2020-02-11 14:47:58	DocuSign envelope XYZ Fun...	Jen Smith
2020-02-11 14:47:12	DocuSign envelope XYZ Fun...	Jen Smith
2020-02-11 14:46:16	DocuSign envelope XYZ Fun...	Jen Smith
2020-02-11 14:44:41	DocuSign envelope XYZ Fun...	Jen Smith
2020-02-11 14:43:54	DocuSign envelope XYZ Fun...	Jen Smith
2020-02-11 14:40:12	DocuSign envelope XYZ Fun...	Jen Smith
2020-02-11 14:39:26	DocuSign envelope XYZ Fun...	Jen Smith

- **Drafts:** Here, users can save Envelopes as Drafts. Clicking on the Send button next to each Draft will take the user to the DocuSign Send panel.

DocuSign

Overview Statuses Notes **Drafts** New Envelope DocuSign User Settings

Date Created	Created By	Subject	Envelope ID	Send
2019-03-25 16:40:...	Alexandra Voicule...	AccoutProfile - DO...	f063220b-1ce5-4a...	Send

- **New Envelope:** Users can View, Add, or Remove new documents that will be sent via DocuSign.

DocuSign

Overview Statuses Notes Drafts **New Envelope** DocuSign User Settings

Name	File	Status	Publish Date	Remove
XYZ Funding Inc-A...	XYZ Funding Inc-A...		2020-02-11	Remove

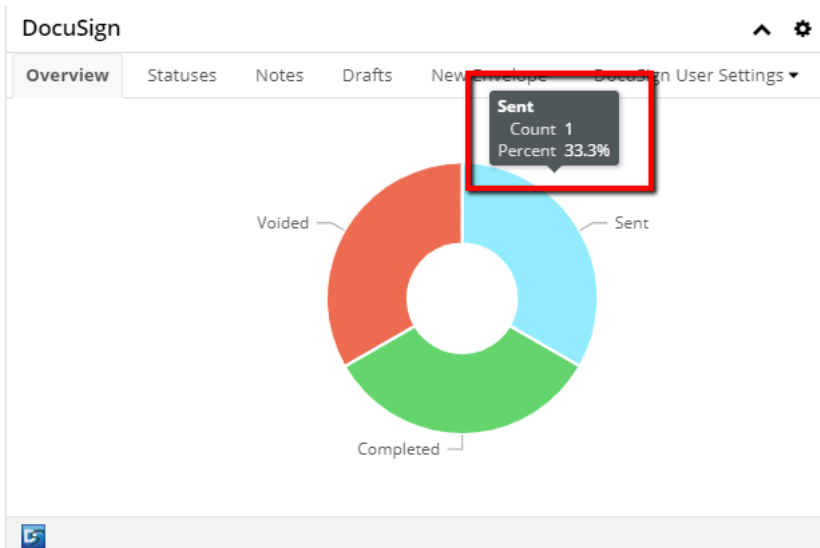
Send Quick Send Use Template Cancel

DocuSign Dashlet Chart

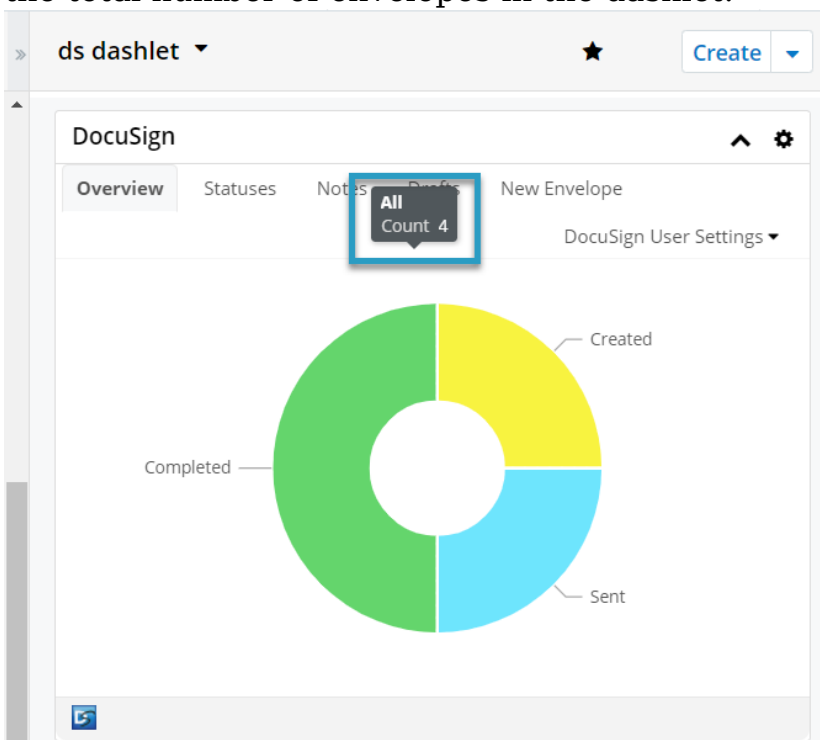
A DocuSign Chart is available on the Overview tab in the DocuSign Dashlet. Users can differentiate between different envelope statuses displayed in the Chart by their colors.

Note: Users with the **DrillDown Package** will notice a change in chart colors.

Hovering over a chart slice will display a tooltip with the number and percentage of envelopes having that status:



Note: Starting with version **3.10**, the DocuSign dashlet also supports a tooltip for the total number of envelopes in the dashlet.



Clicking on any slice of the chart will take the user to the Statuses tab and will display a list of all envelopes with the selected status:

DocuSign					
Overview	Statuses	Notes	Drafts	New Envelope	DocuSign User Settings
Date Created	Created By	Status / History	Envelope ID		
2020-02-11 14:46:...	Jen Smith	sent	f3377272-a8b1-4		

Clicking in the center of the chart will take the user to the Statuses tab with all envelopes in any status.

DocuSign					
Overview	Statuses	Notes	Drafts	New Envelope	DocuSign User Settings
Date Created	Created By	Status / History	Envelope ID		
2020-02-11 14:46:...	Jen Smith	sent	f3377272-a8b1-4		
2020-02-11 14:43:...	Jen Smith	voided	51db597f-0256-4		
2020-02-11 14:38:...	Jen Smith	completed	63cf4fa4-ca7f-43		

This function is also available for **Notes**.

Notifications

All envelope actions from DocuSign will generate a Sugar Notification for the user who generated the envelope. Each notification will include information on the Type and Severity of the Envelope.

Notifications (14) Results per Page: 20

Filter ▼ Create Search by subject...

Severity	Subject	Related to	Status
DocuSign Info	Sent:XYZ Funding Inc-Account Profile Te...	XYZ Funding Inc-Account Profile Templat...	Unread
DocuSign Info	Completed:XYZ Funding Inc-Account Pro...	XYZ Funding Inc-Account Profile Templat...	Unread
DocuSign Info	Voided:XYZ Funding Inc-Account Profile ...	XYZ Funding Inc-Account Profile Templat...	Read
Warning	Customer Journey license is about to ex...		Read
DocuSign Info	Sent:XYZ Funding Inc-Account Profile Te...	XYZ Funding Inc-Account Profile Templat...	Read
info	New Stock Reports Available		Read
DocuSign Info	Sent:XYZ Funding Inc-Account Profile Te...	XYZ Funding Inc-Account Profile Templat...	Read
DocuSign Info	Delivered:XYZ Funding Inc-Account Profil...	XYZ Funding Inc-Account Profile Templat...	Read
DocuSign Info	Delivered:XYZ Funding Inc-Account Profil...	XYZ Funding Inc-Account Profile Templat...	Read
DocuSign Info	Completed:XYZ Funding Inc-Account Pro...	XYZ Funding Inc-Account Profile Templat...	Read
Warning	Customer Journey license is about to ex...		Read
DocuSign Info	Sent:XYZ Funding Inc-Account Profile Te...	XYZ Funding Inc-Account Profile Templat...	Read
Warning	Missing SMTP Server settings		Read
DocuSign Info	Sent:XYZ Funding Inc-Account Profile Te...	XYZ Funding Inc-Account Profile Templat...	Read

Adding a Related Contact as Recipient

If a record has one or more Contacts related to it, the user can select which contact to send the envelope to. The **Select Signer Recipients** drawer has all contacts selected as recipients by default. The user can select which of the related contacts to receive and sign the document.

Select signer recipients

Selected: (3)

XYZ Fundi... Samuel W... Barbara M...

<input checked="" type="checkbox"/>	Name	Email Address	Type	In Sugar
<input checked="" type="checkbox"/>	XYZ Funding Inc	mbulacu@w-systems.com	Signer	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Samuel Warren	samuel.warren@aol.com	Signer	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Barbara Montgomery	barbara.montgomery@gmx.com	Signer	<input type="checkbox"/>

DocuSigned Document

New records for the DocuSigned documents are created in the **Documents** module. These are related to the record from where the document was sent and to the [DocuSign Envelope Module](#).

Edit ▾

Overview	
File Name:	XYZ Funding Inc-Account Profile Template - DOCUSIGNED.pdf
Document Name:	XYZ Funding Inc-Account Profile Template - DOCUSIGNED.pdf
Document Type:	
FOR LABEL MERGING:	<input checked="" type="checkbox"/>
USE REVISIONS:	<input checked="" type="checkbox"/>
IS MERGED:	<input checked="" type="checkbox"/>
Publish Date:	2020-02-12
Expiration Date:	
Description:	
Related Document:	
Assigned to:	Jen Smith

Accounts	
Create ▾	
Name ⇅	City ⇅
XYZ Funding Inc	Orlando

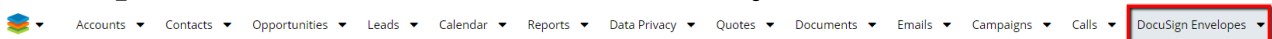
Envelopes	
Select ▾	
Name ⇅	Envelope Status ⇅
XYZ Funding Inc-Account Profile Template - DOCUSIGNED.pdf	completed

DocuSigned Documents can be recognized by their name, constructed in the following way:

[First_document_name_added_in_envelope] - DOCUSIGNED.[file_extension]

DocuSign Envelope and Audit

After the DocuSign module is installed on a Sugar instance, the **DocuSign Envelope** module will be created automatically.



Once new Envelopes or Drafts are created with DocuSign, a new record is automatically created in the **DocuSign Envelopes** module. The module contains all relevant information about each record:

-
- **DocuSign Envelope Name** - given by the first document name (NOT filename) added to the envelope.
 - **Completed DocuSign Envelope Name** - all completed documents are saved with the **DOCUSIGNED** particle at the end of the name.
 - **Envelope ID Envelope Status** - the current status of the envelope. It will be updated each time a change is made. The **Status** of an envelope can be changed through two methods: **Scheduled Job** or **DocuSign Notification**.
 - **Note:** DocuSign Envelope statuses are automatically updated in Sugar without running a Scheduled Job. By default, the [DocuSign scheduled job](#) is set to run once a day.
 - **Subject** - given by the first document name (NOT filename) added to the envelope.
 - **Assigned To** - the user that initially created the envelope.
 - **Flex Relate Field** - contains information on the module and the hyperlinked record where the document has been sent.
 - **Completed Document** - this field is populated for the completed envelopes, exclusively.
 - **Last Audit** - this is a datetime type of field and is automatically updated with every audit performed. It contains the date and time when an update for the envelope has been requested from DocuSign regarding the current envelope.

Updates regarding the **Envelope Status** can be requested in two different ways:

- **Manually.** Use the **Fetch from DocuSign** action available in **Record View** for each envelope.
- **Automatically.** Run the **DocuSign Scheduled Job** action.

Documents in Envelope subpanel: all documents created in **DocuSign Envelope** can be found in the **Documents in Envelope** subpanel.

Notes subpanel: a new **Notes** subpanel will be created for each record in the **DocuSign Envelopes** module. The subpanel holds information about each envelope's status.

Accounts/Contacts/Leads/Targets/Opportunities/Cases subpanels: based on email addresses, new relations between envelope records and different modules are created.

In the example below, we have an email address from the **Accounts** module, so only the Accounts subpanel is populated.

AC ACCOUNTS (1)				
Name	City	Billing Country	Phone	
★ XYZ Funding Inc	Orlando	USA	+1 - 712 - 354 - 2880	👁️
<div style="display: flex; justify-content: space-between;"> CS CASES + ▾ </div> <div style="display: flex; justify-content: space-between;"> CO CONTACTS + ▾ </div> <div style="display: flex; justify-content: space-between;"> LE LEADS (0) + ▾ </div> <div style="display: flex; justify-content: space-between;"> OP OPPORTUNITIES + ▾ </div> <div style="display: flex; justify-content: space-between;"> TA TARGETS + ▾ </div>				

Resend Envelopes

Users that want to resend envelopes can manage to do so from the DocuSign Dashlet.

Note: The Resend action is only available for the "Sent" and "Delivered" envelope statuses.

Go to the Statuses tab and click on the action menu next to any Envelope in the list view. Here you will see the Resend action item:

DocuSign				
Overview	Statuses	Notes	Drafts	New Envelope
DocuSign User Settings ▾				
Date Created	Created By	Status / History	Enve	
2020-02-12 08:41:...	Jen Smith	completed	afcei	🔄 ▾
2020-02-11 14:46:...	Jen Smith	sent	f337	🔄 ▾
2020-02-11 14:43:...	Jen Smith	voided		Resend
2020-02-11 14:38:...	Jen Smith	completed	63cf	🔄 ▾

The Resend action is also available from the DocuSign Envelopes record view actions menu.

DE XYZ Funding Inc-Account Profile Template.xlsx ☆

Envelope ID
f3377272-a8b1-46d2-9680-43baadd0bfe2

Envelope Status
sent

Subject
XYZ Funding Inc-Account Profile Template.xlsx

Assigned to
Jen Smith

Teams
Global (Primary)

Account
XYZ Funding Inc

Completed Document

Last audit
2020-02-11 16:47

Date Created
2020-02-11 16:47

Created By

Dropdown menu options:
Share
Find Duplicates
Copy
Historical Summary
View Audit Log
Envelope History
Fetch from DocuSign
Resend
Delete
Merge Document
Merge Document to PDF

In-Session Sending Experience

The In-Session feature can be used only with the following actions:

- **Send with DocuSign:** From the Document subpanel
- **Send:** From the New Envelope tab on the DocuSign dashlet

Once any of the actions above is triggered, the **Select Signer Recipients** drawer opens.

Select signer recipients

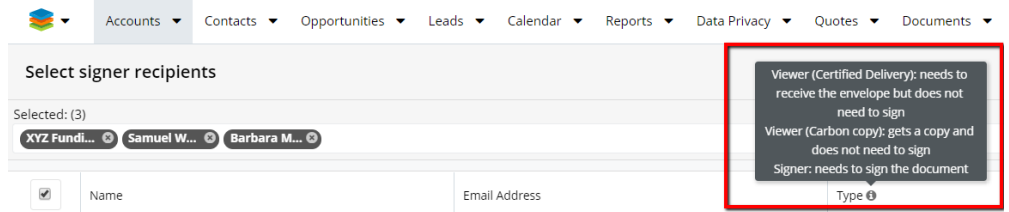
Selected: (3)

XYZ Fundi... Samuel W... Barbara M...

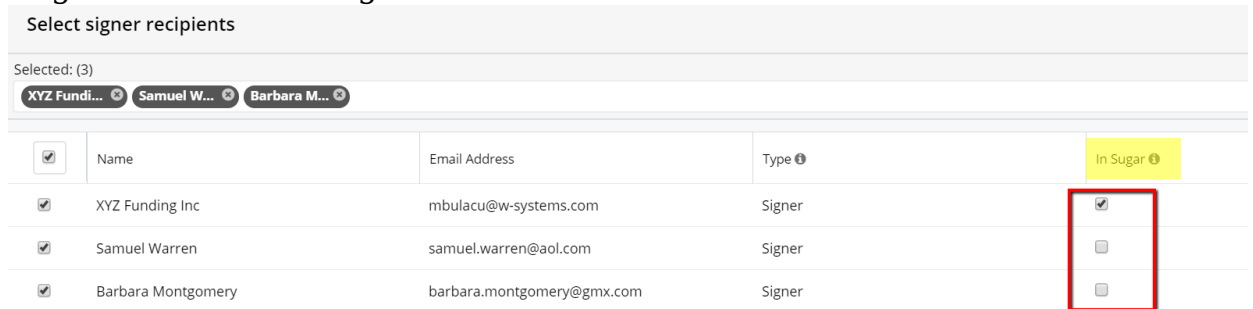
<input type="checkbox"/>	Name	Email Address	Type ⓘ	In Sugar ⓘ
<input checked="" type="checkbox"/>	XYZ Funding Inc	mbulacu@w-systems.com	Signer	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Samuel Warren	samuel.warren@aol.com	Signer	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Barbara Montgomery	barbara.montgomery@gmx.com	Signer	<input type="checkbox"/>

The Select Signer Recipient drawer contains data regarding the following:

- **Name**
- **Email Address**
- **Type:** The header will have an info tooltip that will explain each value of the Type dropdown field:
 - Viewer (Certified Delivery): needs to receive the envelope but does not need to sign the document.
 - Viewer (Carbon Copy): gets a copy but does not need to sign the document.
 - Signer: needs to sign the document.

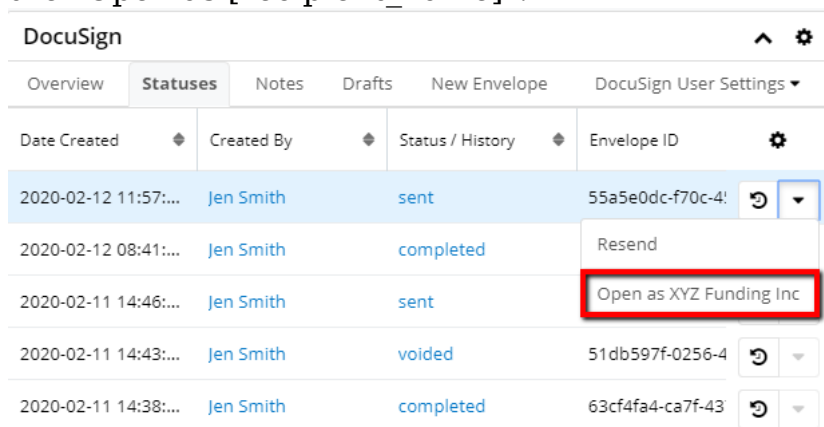


- **In Sugar:** This is a checkbox that once ticked will open the envelope from Sugar without sending an email.



Note: If a recipient is marked as "Viewer (Carbon copy)" and also with "In Sugar" checked, the drawer will not close and an error is raised: "Error Viewer (Carbon copy) recipients can not open the envelope from Sugar." Users must untick the "In Sugar" checkbox to complete this action. The Carbon Copy viewer will only receive a copy of this envelope.

Once the envelope is sent, this can be opened as each recipient from Sugar using the "Open as [recipient_name]":



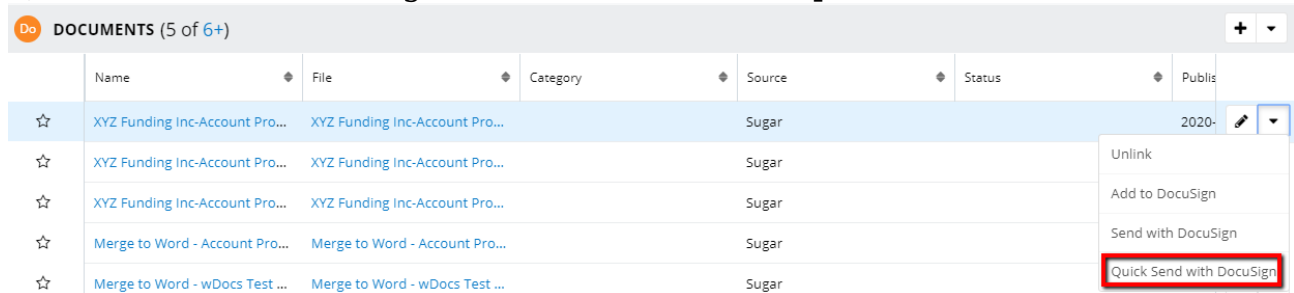
The DocuSign document will open in a new tab where the user can sign the document.

Once signed, the tab automatically closes.

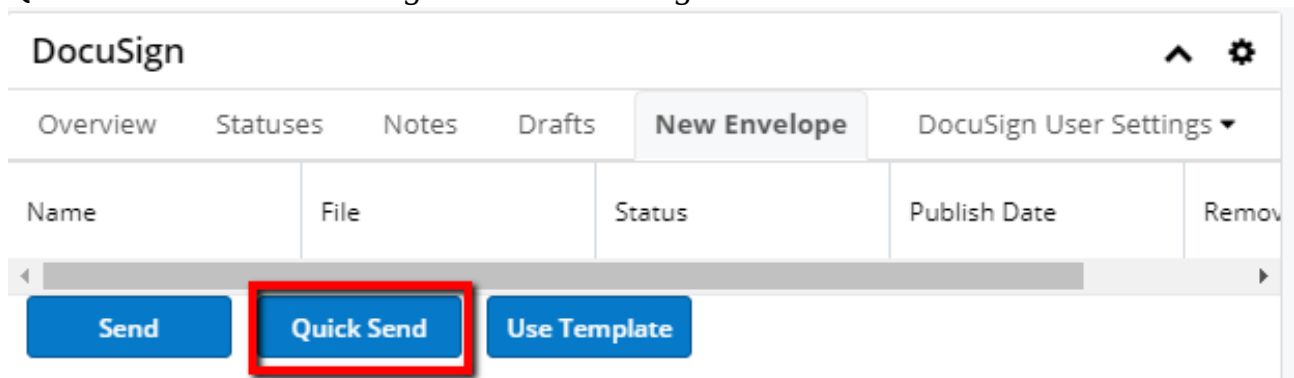
Quick Send with DocuSign

The "Quick Send with DocuSign" action is available from the Documents subpanel in Record View but also from the "New Envelope" tab on the DocuSign dashlet. This action will not provide the [In-Session Sending Experience](#) presented above.

Quick Send with DocuSign in the Documents Subpanel:



Quick Send with DocuSign in the DocuSign Dashlet:



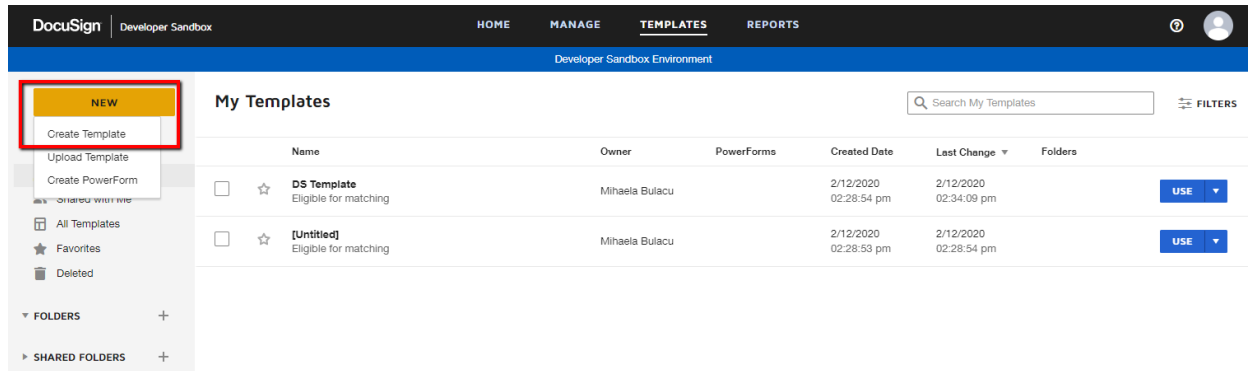
Template Mapping of Recipients

DocuSign has a new feature that allows users to see the number of recipients related to the selected template. The **Template Mapping of Recipients** feature allows users to relate and map recipients with a template in DocuSign. To manage this, follow the steps below.

1. Go to DocuSign and log in with your user credentials.
2. Click on the Templates button in the header menu.



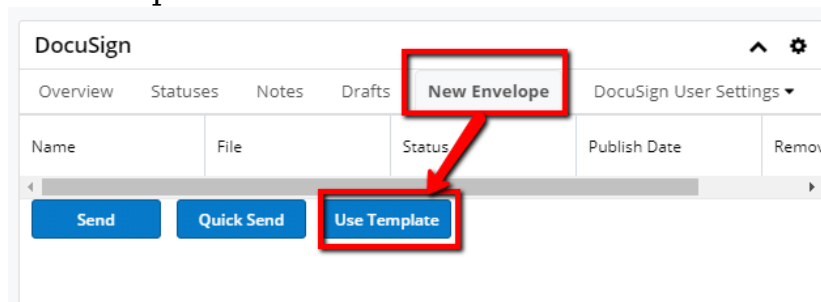
3. Create a new template by clicking on the **New** button. Select the **Create Template** option from the menu.



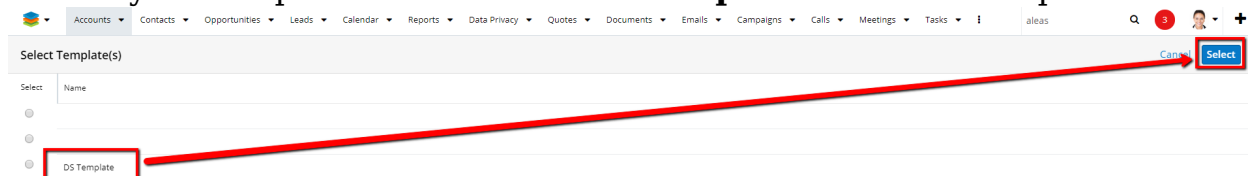
- **Note:** When creating a new template make sure to:
 - Upload documents
 - Add recipients to the envelope
 - Set signing order
 - Set role for each recipient. There is already a list of roles offered by DocuSign:
 - Needs to sign
 - In Person Signer
 - Receives a Copy
 - Needs to View
 - Allow to Edit
 - Specify Recipients
 - Update Recipients
 - Set Email subject
 - Add Email Message

4. Save your template.

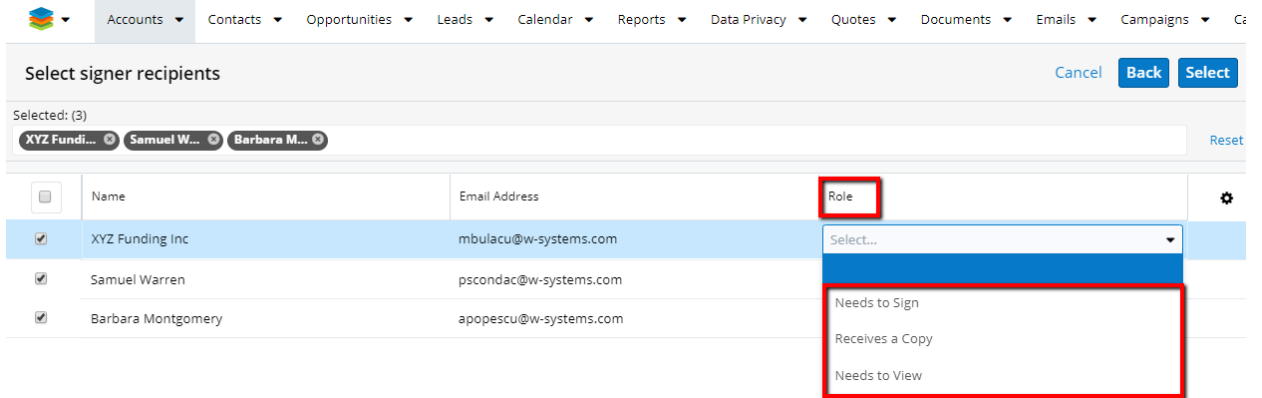
5. Go to your DocuSign dashlet in Sugar, in the New Envelope tab. Press the Use Template button.



6. **Select** your template from the **Select Template** drawer that opens.



7. Choose the recipient(s) from the **Select Signer Recipients** drawer and set **Roles** for each of them.



Once the user sets roles for each recipient, a new web tab with the configured document will open.



Note: The Recipient signing order in the DocuSign template will be the same as the one established when the template was created.

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

Set signing order

1	Role Needs to Sign	NEEDS TO SIGN
	Name Mihaela Bulacu	
	Email mbulacu@w-systems.com	
2	Role Needs to View	NEEDS TO VIEW
	Name Mihaela Bulacu	
	Email mbulacu@w-systems.com	
3	Role Receives a Copy	CC RECEIVES A COPY
	Name Mihaela Bulacu	
	Email mbulacu@w-systems.com	

DocuSign Envelopes Recovery

The recovered DocuSign envelope record will be assigned to the User with the corresponding 'Sender email'.

The 'Parent' field is populated on the new recovered envelope with the corresponding account/contact that has the same email address as the envelope recipients. If an account record is found, that will be the envelope's parent. If a contact record is found, first we try to use his parent account (if set) and then we use the respective contact record.

DocuSign Envelopes Recovery

Start: 08/13/2020 End: 08/13/2020

Bulk

[Schedule recover envelopes for user](#) [Schedule recover all](#)

User name - DocuSign Account [Email]

User Envelopes

Monica A - W-SYSTEMS [mmanea@w-systems.com] [List](#) [Get selected](#)

You have selected all 2 envelopes

<input checked="" type="checkbox"/>	Envelope Name	Status	Sender email	Created on	Last modified	Envelope URI	
<input checked="" type="checkbox"/>	abc - DOCUSIGNED.pdf	sent	mmanea@w-systems.com	August 13th 2020, 2:17:47 pm		/envelopes/bb43dafc-914c-4576-a44d-e86bb8527533	Get
<input checked="" type="checkbox"/>	abc - DOCUSIGNED.pdf	sent	mmanea@w-systems.com	August 13th 2020, 1:59:40 pm		/envelopes/5b0ad050-9f3f-41c8-b133-c31c07ef99b0	Get

- **Start Date:** The start date of the interval you want to set up Sugar to search for recovered envelopes.
- **End Date:** The end date of the interval you want to set up Sugar to search for recovered envelopes.
- **Schedule Recover Envelopes for User:** This option will create a Schedule Job that recovers the envelopes for the specified interval, for a specific DocuSign User
- **Schedule Recover All:** This option will create a Schedule Job that recovers all envelopes for the specified interval, for all users
- **User Envelopes:** This field shows the users for which the envelopes are recovered.

Ticking the **Envelope Name** checkbox will automatically select all envelopes.

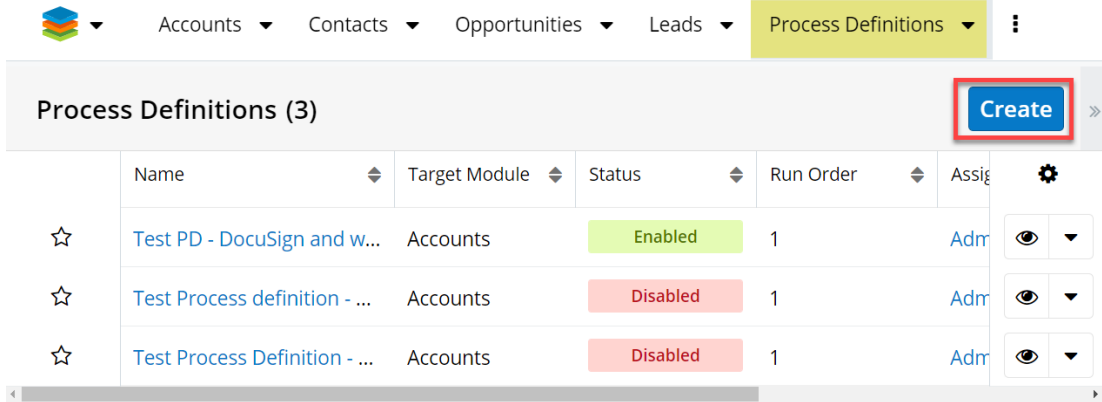
Sending Documents Merged With wDocs to Signature

Documents merged with wDocs can now be sent for signature to DocuSign by

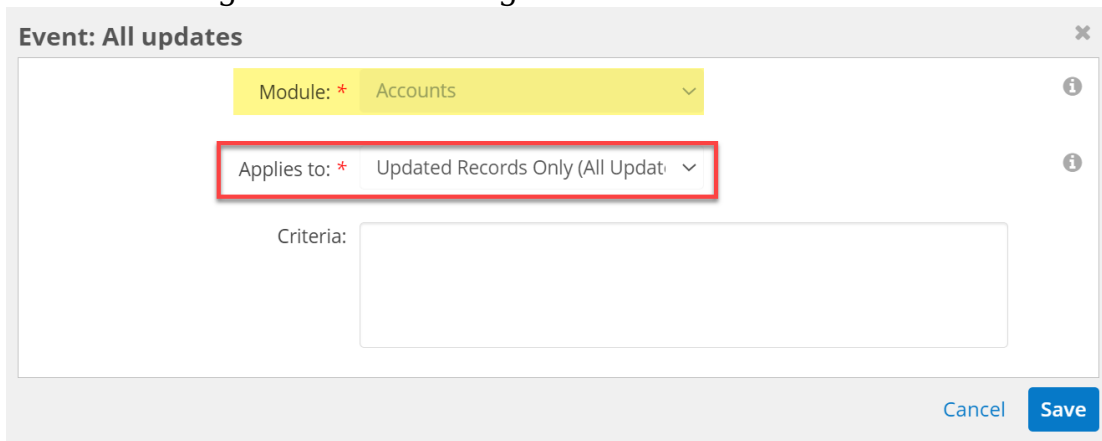
creating a process definition in [SugarBPM](#).

Note: To set up this behavior, you must have [wDocs](#) installed in your instance and you must be using Sugar Sell, Serve, Enterprise, or Ultimate.

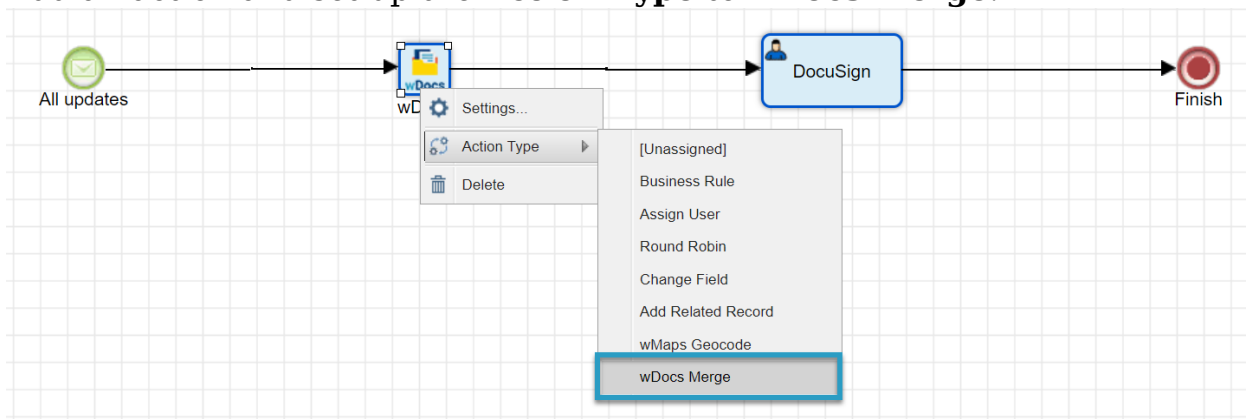
1. Navigate to **Process Definitions** and press the **Create** button.



2. Add a starting event and configure it as follows:



3. Add an action and set up the **Action Type** to **wDocs Merge**.



4. Right-click on the **wDocs Action** type and go to **Settings**.

wDocs Merge Options

Document Name: test-wDocs1.docx

Merge Type: DOCX

Email Template: Select...

From: * Current User

To:

Cancel Save

5. Add another action with a form button to send merged documents for signature to **DocuSign**:

Activity: DocuSign

General | Readonly fields | Required fields | Expected Time

Form Buttons: Send to DocuSign

Other Routing Options:

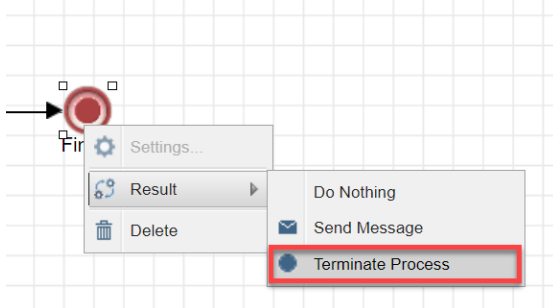
Change Assigned To User:

Team: Global

Select New Process User:

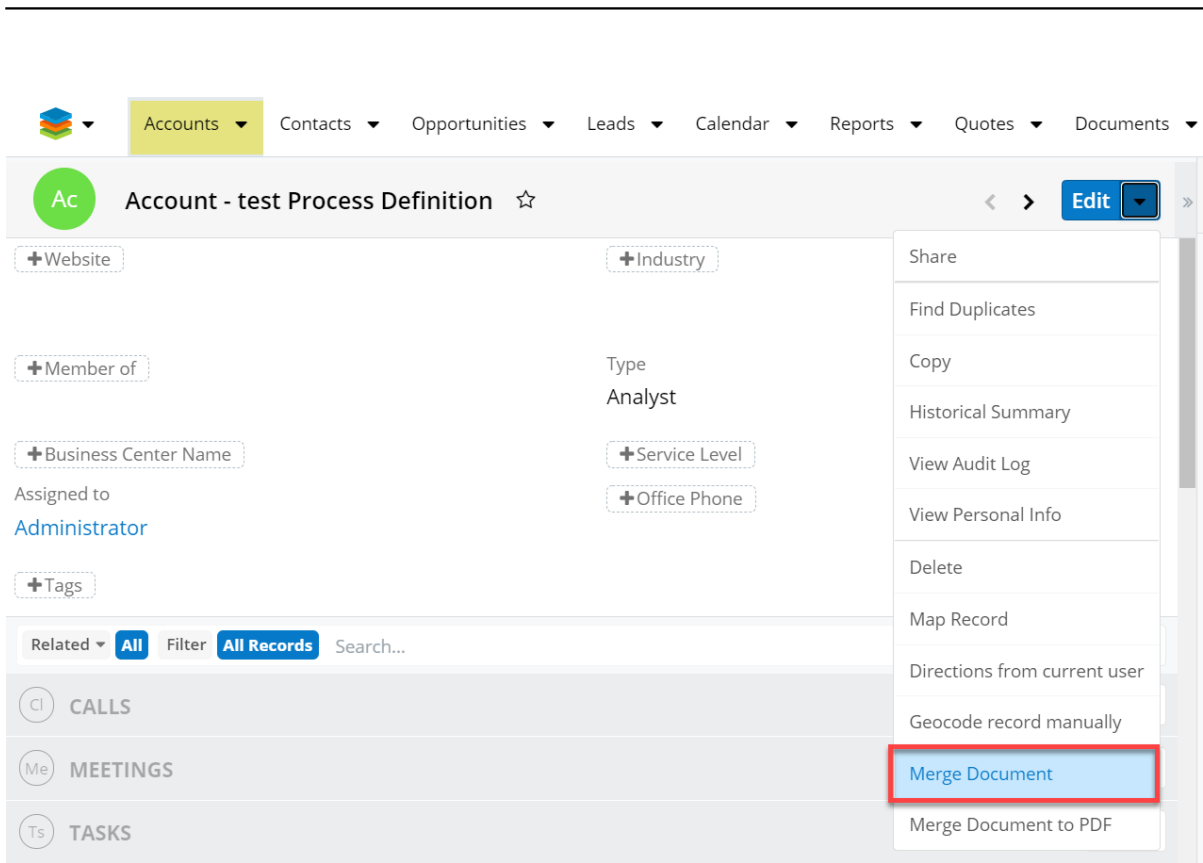
Cancel Save

6. Add an End event configured like in the image below.

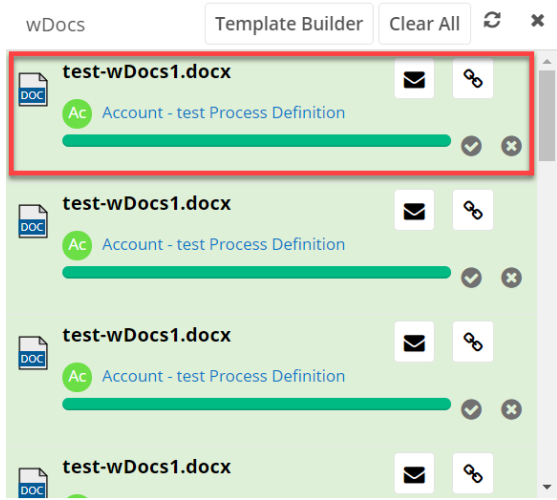


7. **Save** your Process Definition configuration.

To use this new feature, go to the Module for which you have defined the process (**Accounts**, in our example), and open a record in **Record View**.



Merge record data into a new wDocs Microsoft Word document.



Create a new home dashboard with **Processes**.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ ⋮

Add a Sugar Dashlet® Cancel

Process

Title	Description	
Process Business Rules	Process Business Rules dashlet displays th...	
Process Definitions	Process Definitions dashlet displays the te...	
Process Email Templates	Process Email Templates dashlet displays t...	
Processes	Processes dashlet displays the templates t...	

The new dashboard will display the new process definition set up with the merged document.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾

Processes

Current Overdue

1
My Processes

Process # 16 - Account - test Process Definition
 Administrator 9 days ago DocuSign
 Test PD - DocuSign and wDocs

Clicking the entry will open a record view of the process with a predefined button that allows users to send the merged document to signature.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Processes ▾

Test PD - DocuSign and wDocs | DocuSign

Ac Account - test Process Definition ☆ Send to DocuSign

+ Website

+ Industry

+ Member of

Type Analyst

+ Business Center Name

+ Service Level

Assigned to Administrator

+ Office Phone

Last Modified: 2021-05-18 02:35:25