

DocuSign®

Sugar Connector to DocuSign



Send, Sign, Success

DocuSign® is the global standard for electronic signature, offering the easiest, fastest, most secure way to send, sign, track and store documents in the cloud. Integrated with all editions of Sugar, DocuSign for Sugar helps sales users close more business more quickly. Users can configure and send envelopes from the DocuSign dashlet on almost any object in Sugar, and your customers can sign documents from any browser, including mobile devices, within minutes.

DocuSign enables many different scenarios, including:

- Counter offers
- Multiple signers
- Confirmation of a signer's authority to sign
- Specified signer routing order
- Designation of specific fields as negotiable
- Delegation of signing responsibility to others

Key Features



Drag and drop the DocuSign dashlet on any object (included on Accounts, Contacts, Leads, Opportunities, and Quotes by default)



View envelope statuses for a summary of where your documents are



Signed documents are automatically stored back as a PDF onto the originating record in Sugar



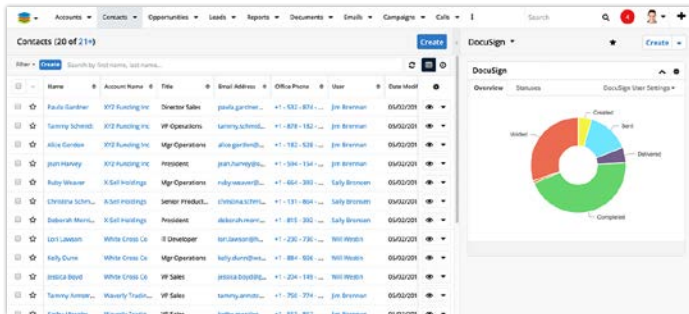
Send documents for signature right from the dashlet, and use the familiar DocuSign interface to add or edit tags within Sugar



Get real-time alerts on document status changes from your activity feed

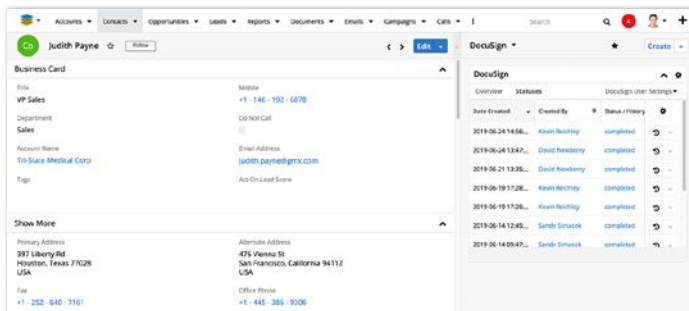
Features

Easy-to-Use Dashlet



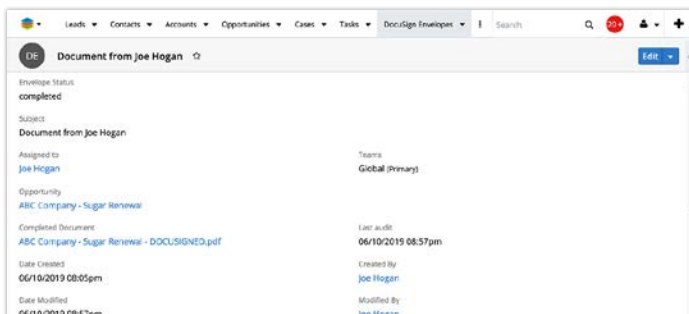
The DocuSign dashlet enables you to send and track documents directly from within Sugar, and can be added to any module, including Accounts, Contacts, Leads, Opportunities, and Quotes.

Envelope Statuses



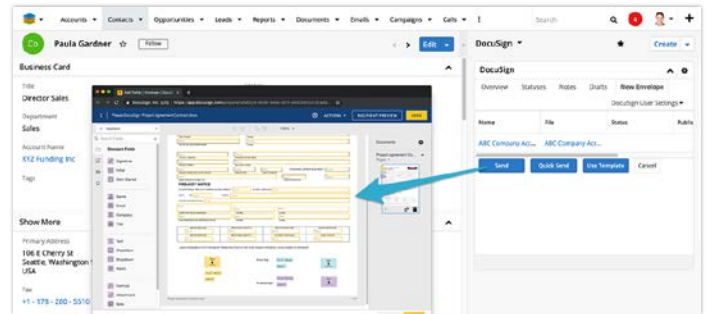
The Sugar Connector to DocuSign dashlet allows you to track your sent documents status directly within Sugar.

View Signed Documents in Sugar



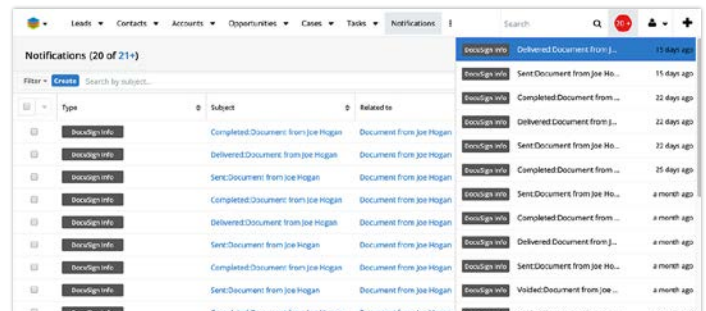
The Sugar Connector to DocuSign automatically stores your signed documents as PDFs in Sugar, and links them to the originating record.

Send Documents for Signature



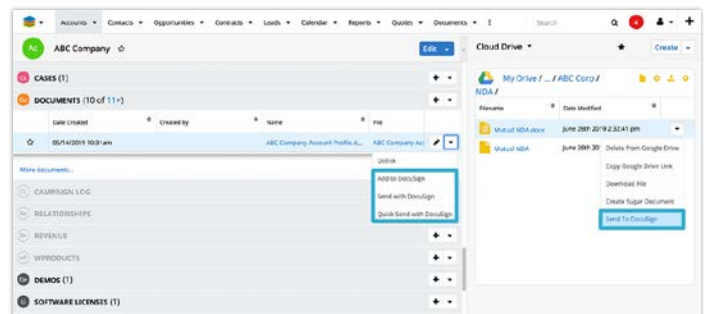
Using the Sugar Connector to DocuSign dashlet, you can send documents to your contacts for signature without having to switch browser windows.

Real-Time Alerts



With our DocuSign integration, you can receive real-time notifications on document status updates in Sugar.

wDocs and wDrive Support



Easily create ready-to-sign documents using wDocs, and then send them to DocuSign, or directly from your cloud storage solution using wDrive - all directly within Sugar!