

DocuSign Tables Overview

DocuSign is an e-signature provider offering secure electronic signatures for documents. Agiloft provides embedded integration with DocuSign, and has completed an extensive certification process by DocuSign to verify that the Agiloft API is compliant with all DocuSign and e-signing standards requirements. You will need to set up an account at DocuSign before configuring the Agiloft interface.

Visit the DocuSign website at <http://www.docusign.com> to read FAQs and whitepapers, watch How-To videos, and learn more about the e-sign infrastructure. To see more about the DocuSign solution, [view FAQs](#).

Turning on the DocuSign extension creates several tables, fields, and actions in Agiloft. The Agiloft template has been preconfigured with DocuSign to the extent possible without a DocuSign production account, so these tables and fields are already created for you.

To use DocuSign with Agiloft, you will need a Business or Enterprise license for at least one DocuSign user. Anyone in Agiloft who will send a contract document for signature via DocuSign will need a corresponding DocuSign user account. A DocuSign administrator account will be needed to complete the initial configuration within Agiloft.

For full details on how to complete the configuration of DocuSign to deploy it, please review the [DocuSign Users Manual](#). The manual gives a full, detailed overview of how to use DocuSign and how it works.

Use Case for Signing Contracts

The system is currently configured to use DocuSign with Contracts. Note that DocuSign integration can be added to any table in Agiloft by creating a DocuSign action in that table to create an envelope and adding the DocuSign Envelope and DocuSign Recipients related tables to the other table.

For contracts, the DocuSign process begins by pressing the Create DocuSign Envelope action button on the DocuSign tab of a contract record. This button runs a DocuSign action, and that action can be edited if you have a different preferred configuration of signers. It is currently set to use one internal signer and up to two external party signers. These fields are on the Details tab of the contract record and should be filled in during the contract process.

When the button is used to create the envelope, the user may click a Create & Preview button in the Envelope record to go directly to the envelope in DocuSign and preview everything before clicking the Send button to launch the signature process.

Further details of this process are provided in the [Contracts Table](#) section, and in the [DocuSign Integration](#) topic.

Print Templates

We have set up a few sample print templates with DocuSign tags to use as a guide for your own contract print templates. One template, simply a page with a tagged signature block, is on the Attachments table, and the others are in the Contracts table.

The tagging process is fully discussed in the manual, but to see a sample document in the system, go to Print Templates and open the print template with the title "Hosted Service Level Agreement DocuSign Tags".

This template has DocuSign tags in the Signature area – the tags are not visible unless you mouse over the text and apply a different text color. The tags are stored in white font color so they do not appear on the final signed document. If you add more signers or change the basic signing configuration, you will need to create your own tagged signature blocks.