

DocuSign Envelopes Table

This table holds DocuSign Envelope records, which link back to the Contract record they were created from. DocuSign Envelope records also contain an embedded table of the DocuSign Recipients list, as well as an Attached Documents field, which holds the attached files to be reviewed and signed.

Use Case

By default, a DocuSign Envelope is created when a user clicks the Create DocuSign Envelope in the DocuSign Envelopes tab of a Contract record. The DocuSign Envelopes tab of a Contract is currently visible only to users in the admin and DocuSign Users groups. How the envelope and recipients are populated depends on the configuration of the action run by the Create DocuSign Envelope button, and it may be changed by updating that action.

The Status of an Envelope is updated automatically based on its progress at DocuSign. Once it has been sent to DocuSign, it has a Status of Created and shows the Envelope ID in DocuSign. As each Recipient signs the envelope, the Status of the Recipient record is updated to Completed.

More details on working with DocuSign Envelopes are provided in [Create and Send DocuSign Envelopes](#).

Automation

In the standard system demo, the DocuSign Envelopes table contains two rules. These rules are accessed by expanding the DocuSign Envelopes table in the left pane, selecting Setup DocuSign Envelopes, and then selecting the Rules tab:

- **Edit: Convert to Attachments and set Contract to Signed when Status is Completed, API only:** This rule uses a saved search to run whenever the Status field of a DocuSign Envelope record is set as completed. It uses an If-Then-Else action called "Update Contract Status to Signed or Active" and updates the Status of Contract. It also runs a conversion action to create a new attachment record for the signed documents.
- **Edit: Set Contract to Pending Signature when Envelope is sent (Web, API):** This rule uses a saved search to run whenever the Status field of a DocuSign Envelope record is set as Sent. It uses a linked record action to change the related contract record's status as Pending Signature.

Ownership

DocuSign Envelope records are owned by the sender of the envelope. Specifically, records are owned by the user whose Login matches the Sender Login field.