

DocuSign Integration

Last Modified on 05/19/2021 2:17 pm EDT

Overview

The eSignature solution trusted by hundreds of millions of users:

Get remote work done faster and easier: From sales contracts and offer letters to account openings and invoices, DocuSign eSignature is the world's #1 way to send and sign from practically anywhere, at any time. And because it's part of the DocuSign Agreement Cloud, you can extend these benefits to other stages of the agreement process, such as preparing, acting on, and managing agreements.

Our DocuSign integration works with their [eSignature Plans](#). See more about our [partnership with DocuSign](#).

We integrate with DocuSign by generating a PDF in Order Time and appending the signature. Order Time allows for multiple recipients and you can email straight from our platform. The DocuSign signature is saved as an attachment on your shipping documents.

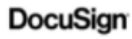
Activating the Integration

Connecting DocuSign to Order Time is quick and easy:

1. Have your Super Admin go to the cog at the upper-right in Order Time
2. Select [Other Integrations](#) in the General column
3. Click the green Activate button under DocuSign
4. This takes you to an Authorization screen where you log into DocuSign and give the permissions.
5. Now you're connected!

Other Integrations

DocuSign



Get remote work done faster and easier: From sales contracts and offer letters to account openings and invoices, DocuSign eSignature is the world's #1 way to send and sign from practically anywhere, at any time.

Deactivate

Setting Up Your Form Templates

First up now that we've activated the integration, we need to edit the Quote and Sales Order Form Templates.

We need to do this to add the Authorized Signature section so that DocuSign knows where to put the signature once your document has been signed.

Head to your Admin section and click on Form Templates under the Settings column.

Admin	
<p>General</p> <ul style="list-style-type: none"> ▶ Import ▶ Profile Lists ▶ Doc Status ▶ Alerts ▶ ECommerce Integration ▶ Shipping Integration ▶ Accounting Integration ▶ Label Printing ▶ EDI Integration ▶ REST Api ▶ B2B Customer Portals ▶ Other Integrations ▶ Mail and Calendar Integration ▶ Create Support Login 	<p>Settings</p> <ul style="list-style-type: none"> ▶ Company Info ▶ Company Preferences ▶ Custom Fields ▶ Page Layouts ▶ Email Templates ▶ Form Templates ▶ Label Templates

Now search for all the Sales Order and Quote Templates that you have that you want to add a signature to.

Each template will need to be edited by clicking the Edit button under the Actions column.

TYPE	NAME	DESCRIPTION	CUSTOM	IS DEFAULT	RECORD INFO MODIFIED DATE/TIME	RECORD INFO MODIFIED BY	ACTIONS
Sales Order	Work Order	Sales Order Form	<input type="radio"/>	<input checked="" type="radio"/>	4/26/2021 03:06 PM	Ian Benoliel	
Sales Order	Pick List	Sales Order information without prices	<input type="radio"/>	<input checked="" type="radio"/>	5/5/2021 03:39 PM	Ian Benoliel	
Sales Order	Sales Order Clone	A custom Form cloned from Sales Order	<input checked="" type="radio"/>	<input type="radio"/>	2/24/2021 12:09 PM	Ian Benoliel	
Sales Order	Proforma	A custom Form cloned from Sales Order	<input checked="" type="radio"/>	<input type="radio"/>	3/16/2021 11:37 AM	Ian Benoliel	
Sales Order	Manufacturing Order	A custom Form cloned from Pick List	<input checked="" type="radio"/>	<input type="radio"/>	6/28/2019 02:16 PM	Ian Benoliel	
Sales Order	Sales Order T	A custom Form cloned from Sales Order Clone	<input checked="" type="radio"/>	<input type="radio"/>	4/28/2021 02:41 PM	Ian Benoliel	
Sales Order	for exporing	A custom Form cloned from Sales Order T	<input checked="" type="radio"/>	<input type="radio"/>	12/9/2020 03:07 PM	Ian Benoliel	
Quote	Quote	Quote Form	<input type="radio"/>	<input checked="" type="radio"/>	4/26/2021 04:09 PM	Ian Benoliel	

Total Records: 8

IMPORTANT: Once you're editing the individual template go to the Data tab. From here you want to add the words **Authorized Signature** to the Custom Message field. Then click Save in the top-right. This needs to be done for each form that you want to use with DocuSign.

Admin > Form Templates > Edit Template

Edit Template for Quote

Revert to Default Save Reset

General Design **Data** Template Preview

Drag a checkbox up or down to reorder its position.

Summary

- Subtotal
- Ship Amount
- Discount
- Taxes
- Total Amount
- Additional Fee

Doc Final

Custom Message

Authorized Signature

Template Preview

QUOTE

All Orders Demo

No. 123
Date 5/19/2021
Promise Date 5/20/2021

SHIP TO

Barber Inc.
101 Willow Greene Drive
Linden, AL 36748

BILL TO

Barber Inc.
101 Willow Greene Drive
Linden, AL 36748

Revision	Terms	Cust PO	Discount
1	Net 30	123NC	Shop Discount

1	1456-Y76	Large metal enclosure.	10.00	29.00	290.00	EA

Sending a Quote or Sales Order Using DocuSign

Head on over to the Quote or Sales Order that you want to send to the customer for a signature. Click on the Create PDF arrow to see the drop-down of all your Form Templates. Choose the specific one you want to send and click on it.

Sales > Quotes > Quote

Quote - 131 To Sales Order 1494 Create PDF Export

Quote

General Bill Address Ship

No. 131
 Customer Reusability [Change](#)
 Date 2/24/2021
 Promise Date 2/24/2021
 Contact


Items Details Memo & Instructions Custom Attachments Open Activities Activity History

⚙️

LINE NO.	ITEM	DESCRIPTION	QUANTITY	FILLED	UOM	P
1	111	Spare Parts - Sencorp:o-ring	10.00	0.00	EA	7.
2	112	VIRGIN RESIN	10.00	0.00	EA	1.

Make sure you've chosen the correct Form Template by previewing it and click on the **Save and DocuSign** button.

QUOTE



All Orders Demo No. 131
 All Orders Demo Date 2/24/2021
 4651 Sheridan St Promise Date 2/24/2021
 Hollywood, FL 33021
 (800)2786243

BILL TO SHIP TO

Revision Terms Cust PO Discount

2

IMAGE	LINE NO.	ITEM	DESCRIPTION	QUANTITY	PRICE	EXT.	UOM
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Save Save and Email Save and DocuSign Close

This brings up the Send DocuSign prompt. Choose the **Contact** under that Customer that you would like to email the form to. If the Contacts are blank go to the specific Customer, click on the Contacts Tab and add some! You can also add an **Additional Signer** email address in the second field. **Carbon Copy** can be used to send a copy to all email addresses that you want CCed on the

document.

Type in an appropriate email Subject and click on the **Send** button.

The screenshot shows a web application interface with a 'Send DocuSign' modal dialog box. The background interface includes a header with '1494', 'Create PDF', and 'Export' buttons, and a table with columns for 'Bill Address' and 'Ship Address'. The modal dialog box is titled 'Send DocuSign' and contains the following fields:

- Contact:** A dropdown menu with 'Michael DeFelice' selected.
- Additional Signer:** An empty text input field with a lock icon on the right.
- Carbon Copy:** An empty text input field.
- Subject:** A text input field containing 'Quote for Reusability Inc.'

At the bottom right of the modal, there are two buttons: a green 'Send' button and a black 'Cancel' button.

The contacts will receive an email similar to the one below. From here they can review the document and sign it within the DocuSign interface.

Quote for Reusability Inc. 🔍 Inbox x



via DocuSign <dse_na2@docusign.net>
to me ▾

1:46 PM (0 minutes ago) ☆ ↶ ⋮

DocuSign



[Redacted] sent you a document to review and sign.

REVIEW DOCUMENT

DocuSign
[Redacted]

Michael DeFelice,

Please DocuSign _131_5.pdf

Thank You,

They can choose to use a preformatted signature, upload a signature or even draw one in the box.

Adopt Your Signature ✕

Confirm your name, initials, and signature.

* Required

Full Name*

Michael DeFelice

Initials*

MD

SELECT STYLE

DRAW

UPLOAD

PREVIEW

[Change Style](#)

DocuSigned by:
Michael DeFelice DS
DD4F0E8765D2435... MD

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN

CANCEL

After they sign the document a copy will be created under the **Attachments** tab. You can




download it as a PDF by clicking the signed link.

Sales > Quotes > Quote

Quote - 131 To Sales Order 1494 [Create PDF](#) [Export](#)

General	Bill Address	Ship Ad
No. 131 Customer Reusability Change Date 2/24/2021 Promise Date 2/24/2021 Contact		

Items Details Memo & Instructions Custom **Attachments** Open Activities Activity History

NAME ^	RECORD INFO CREATED DATE/TIME
_131_2.pdf	5/19/2021 01:32 PM
_131_3.pdf	5/19/2021 01:33 PM
_131_4.pdf	5/19/2021 01:36 PM
_131_5.pdf	5/19/2021 01:45 PM
_131_5_signed.pdf	5/19/2021 01:51 PM
Quote_131_1.pdf	2/24/2021 05:26 PM

Total Records: 6

The PDF will look like the one below with the signature and DocuSign code clearly affixed. You can print the form for your records or locate it under the attachments at any time.

QUOTE



All Orders Demo

All Orders Demo
4651 Sheridan St
Hollywood, FL 33021
(800)2786243

No. 131
Date 2/24/2021
Promise Date 2/24/2021

BILL TO

SHIP TO

Revision	Terms	Cust PO	Discount				
5							
IMAGE	LINE NO.	ITEM	DESCRIPTION	QUANTITY	PRICE	EXT.	UOM
	1	111	Spare Parts - Sencorp:o-ring	10.00	73.37	733.70	EA
	2	112	VIRGIN RESIN	10.00	1.88	18.80	EA
Created By : Ian Benoliel					Subtotal	752.50	
Memo :					Ship Amount	0.00	
					Discount	-0.00	
					Taxes	0.00	
					Total Amount	752.50	

Authorized Signature

DocuSigned by:
Michael DeFelice
DD4F0E8765D2435...

After the document has been signed an Activity will be created. This appears in the **Open Activities** tab on the Sales Order or Quote.

Quote - 131 To Sales Order 1494 Create PDF Export

General No. 131 Customer Reusability Change Date 2/24/2021 Promise Date 2/24/2021 Contact	Bill Address	Ship Adc
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- Items
- Details
- Memo & Instructions
- Custom
- Attachments
- Open Activities
- Activity History

TYPE	SUBJECT	DUE DATE	DESCRIPTION
Task	Review DocuSign: _131_5_signed.pdf	5/19/2021 01:56 PM	_131_5.pdf has bee

Total Records: 1

It will pop up as a Reminder for the user who sent the form to the Customer, this will send you back to the Quote or Sales Order so that you can set the status to Closed Won. You can continue your regular Sales workflow from that point on.

Reminders [-] [?] [x]

<input type="checkbox"/>	SUBJECT	DESCRIPTION	RELATED TO ENTITY NAME	DUE DATE	REMINDER
<input type="checkbox"/>	Review DocuSign: _131_5_signed.pdf	_131_5.pdf has been signed		5/19/2021 01:56 PM	Overdue

Total Records: 1

Dismiss Dismiss All 5 Minutes Snooze