smarter drafter PRO

by tensis

Enable and Use DocuSign

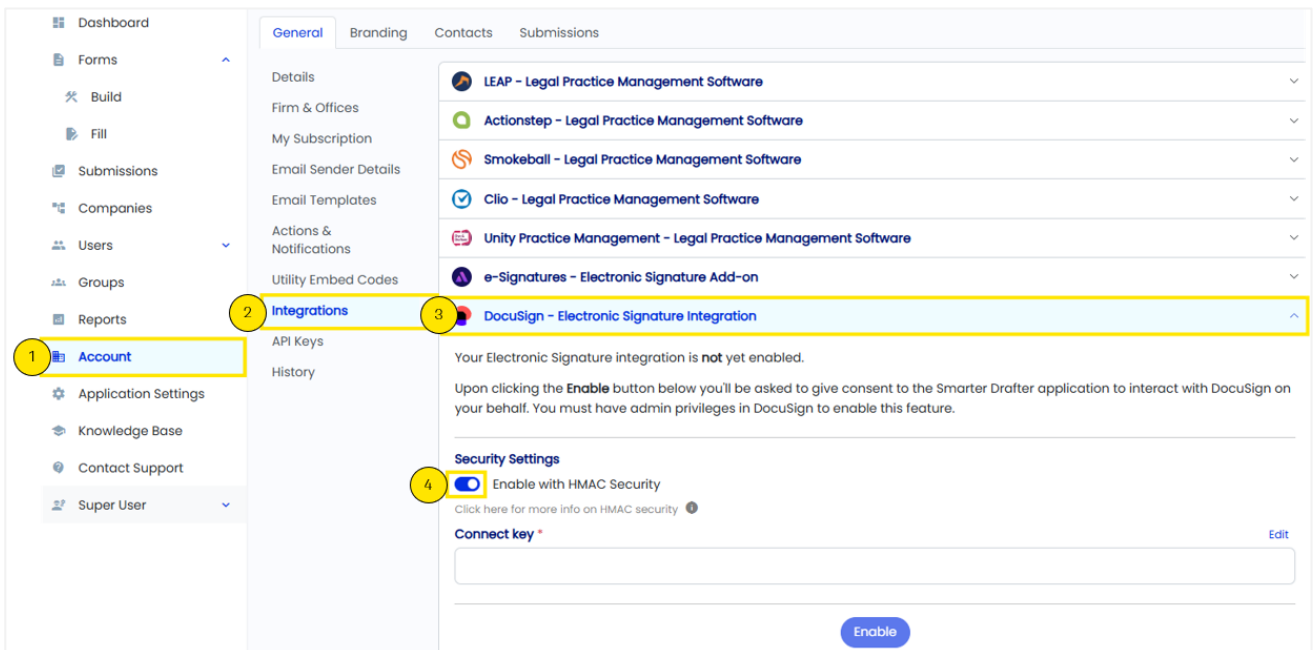Help Guide

Table of Contents

1. Enable DocuSign Integration

DocuSign is an electronic signature integration. To request signatures via DocuSign, the integration must be enabled in Smarter Drafter Pro.

Note: To enable DocuSign, all other e-signature integrations must be disabled. Only one e-signature integration can be implemented at once.

To enable the integration in Smarter Drafter Pro:

1. Click **Account**.
2. Click **Integrations**.
3. Click **DocuSign – Electronic Signature Integration**.
4. There is an option to **Enable with HMAC Security**. If this option is preferred, toggle the setting on, and enter a **Connect Key** (contact your administrator to discuss the Connect Key).

Alternatively, the HMAC Security feature can be turned off by sliding the toggle. When the HMAC security is set as required, click **Enable** to enable Docusign.

Your Electronic Signature integration is **not** yet enabled.

Upon clicking the **Enable** button below you'll be asked to give consent to the Smarter Drafter application to interact with DocuSign on your behalf. You must have admin privileges in DocuSign to enable this feature.
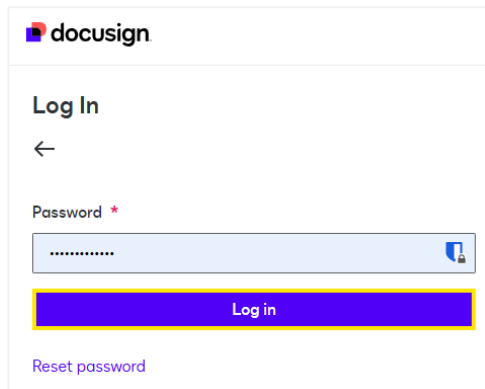
Security Settings

🔘 Enable without HMAC Security

Click here for more info on HMAC security ⓘ

Enable

1.1   Log In to DocuSign

The **Log In** pop up for DocuSign may appear. Enter your credentials and click **Log In**.

docusign

Log In

←

Password *

············ 🔒

Log in

Reset password

1.2   DocuSign is Enabled

DocuSign is now enabled. To disable it, click **Disable** in the integration accordion.

DocuSign - Electronic Signature Integration   ⌃

Your Electronic Signature integration is **enabled**.

E-signature allows you to sign documents via **Submissions** page or Smarter Drafter Word add-in.
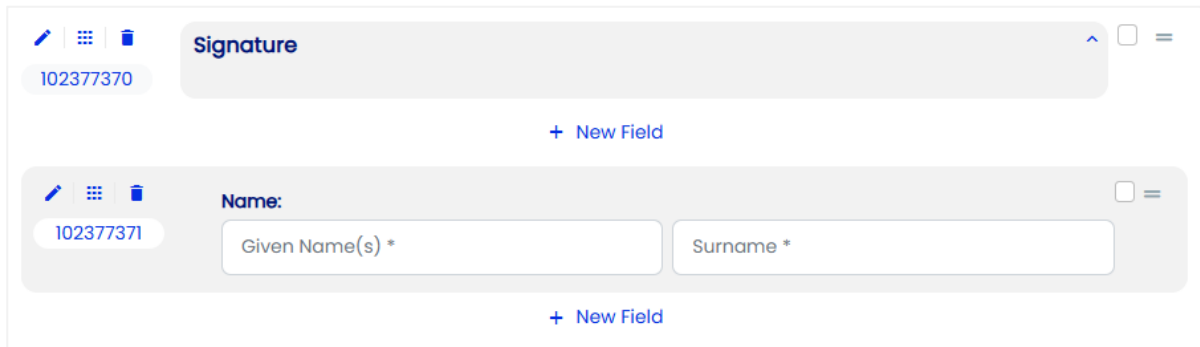
Security Settings

🔘 Enable without HMAC Security

Click here for more info on HMAC security ⓘ

**Disable**   **Update**

2.   Add e-Signature to a Form

When creating a form with a DocuSign e-signature, add a **name field**. This will be used when the e-signature field is added to the template. In this example, the section is called Signature.
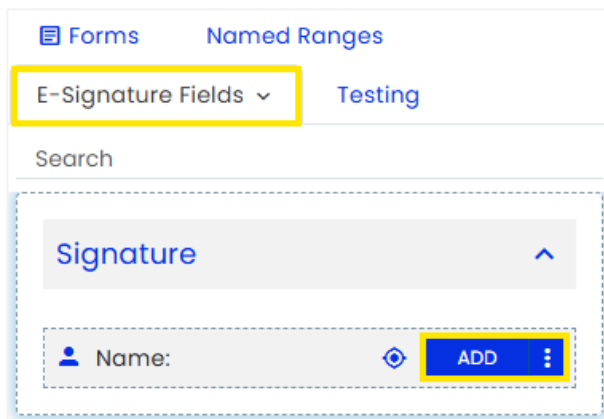

3.   Add Signature to a Template

Now that the form is done, the template can be completed in MS Word, with the e-signature field. To add an e-signature field:

1.   Click **More**.
2.   Click **E-Signature Fields**.
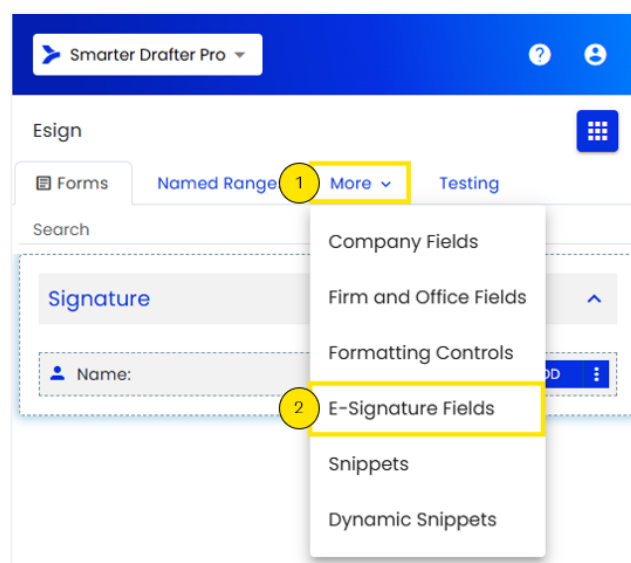
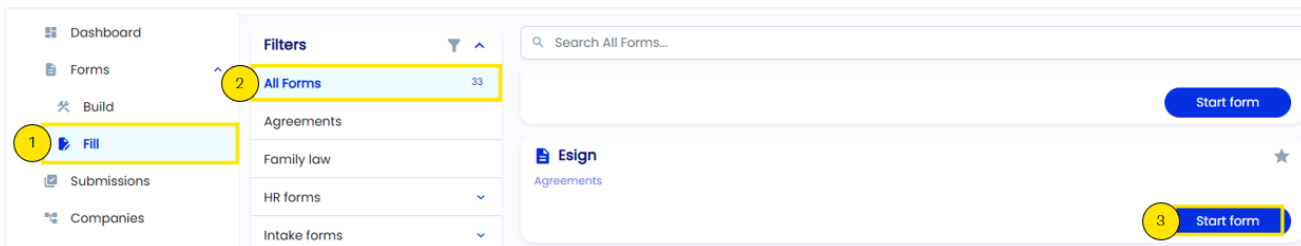The E-Signature Fields tab will open. Click **Add** beside the name for which the e-signature is required.

3.1   Finish and Upload the Template

The **e-signature field** is dropped into the word document, with green content controls. The template can be uploaded to Smarter Drafter Pro (follow the [Help Guide: Create a Simple Template](#) to upload the template).
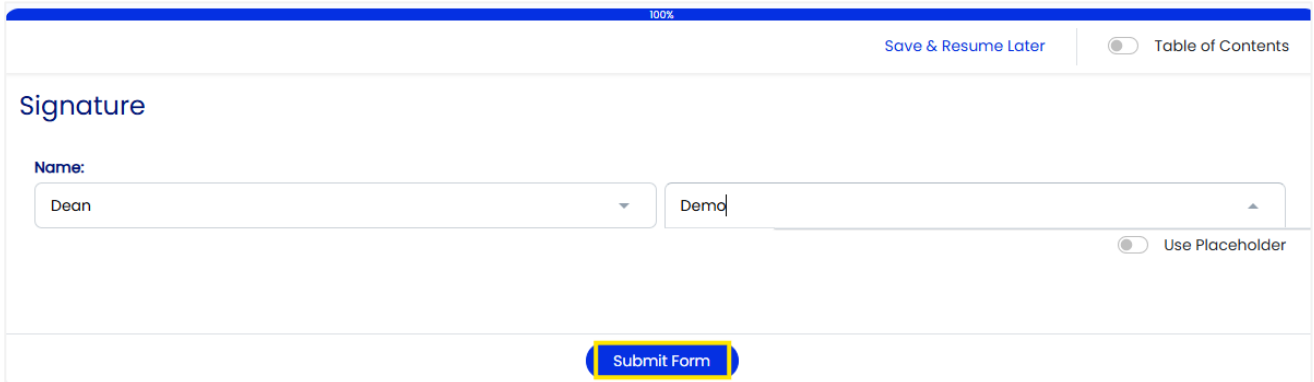

4.   Fill in the Form

The form can now be filled in and tested. There are two ways to test: use **Preview mode** to fill in the form or click **Fill** under the **Forms** heading in the navigation menu. Click **Start form** to fill in the form.
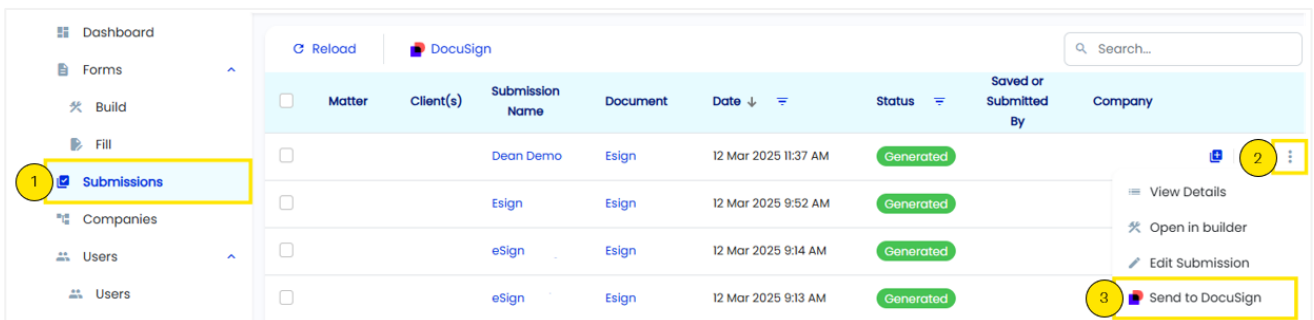
4.1 Submit the Form

Fill in the fields and click **Submit Form**.

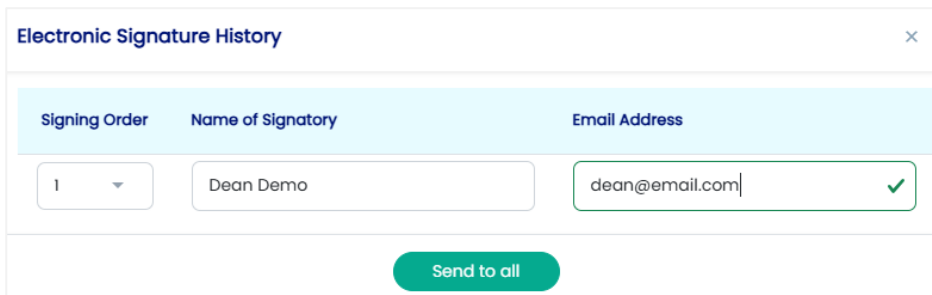## 5. Request the Signature

5.1 Send the Document to DocuSign

1. Open the **Submissions** list from the navigation menu.
2. Click the **ellipsis** beside the submission.
3. Click **Send to DocuSign**.

5.2 Send the Document to the Signatory

The **Electronic Signature History** pop up opens. The name of the signatory is added and the Email Address can be added for delivery to the signatory. Click **Send to All**.
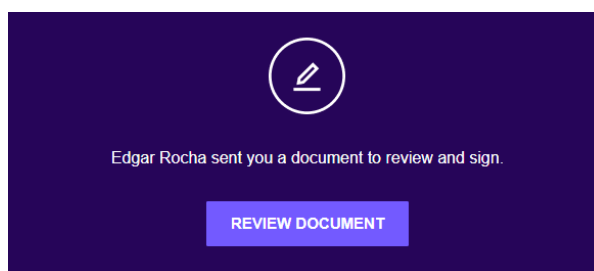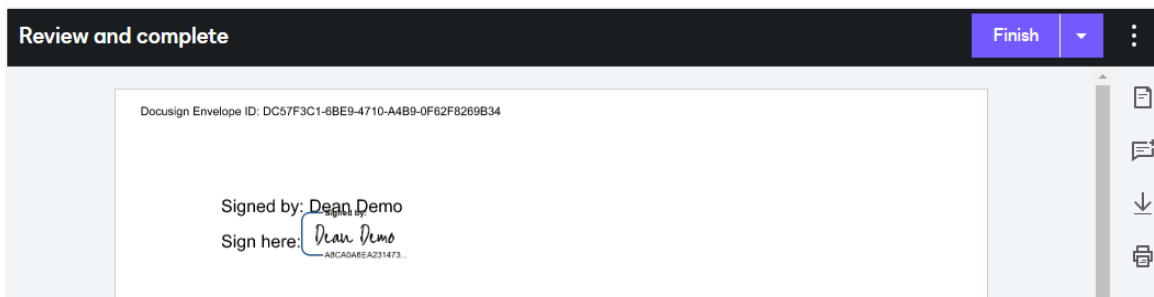

5.3 The Email is Delivered

An email will be sent to the signatory, including a button to **Review Document**.

5.4 The Signature can be Added to the Document

The signatory can sign the document in the e-signature field and click **Finish** to complete the signing.
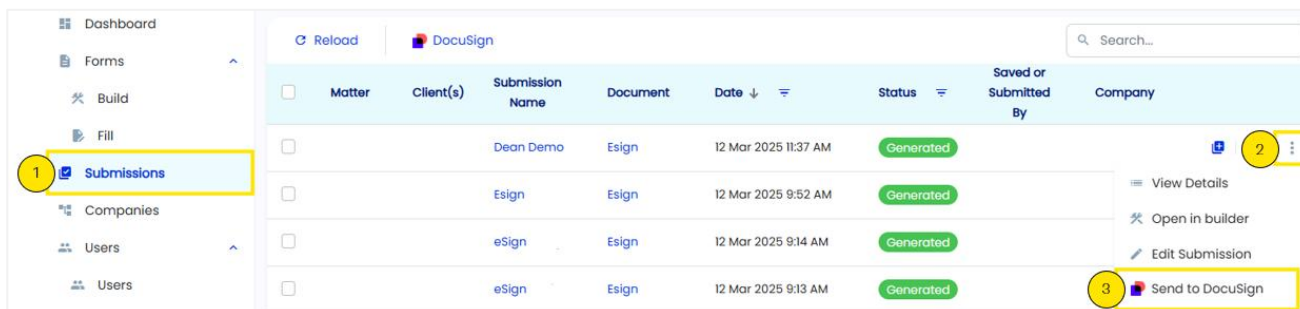
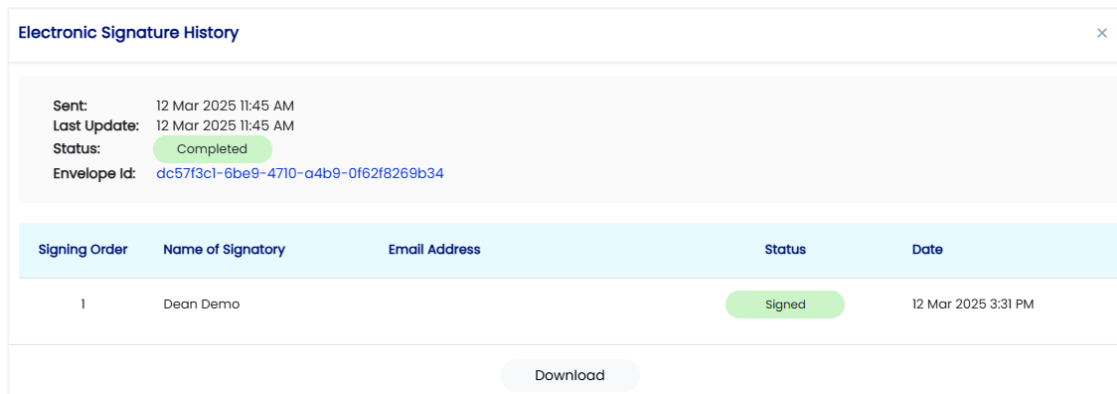## 5.5   Review the Signature

Find the submission in the **Submission list** and check the signed status.

1. Open the **Submissions** list from the navigation menu.
2. Click the **ellipsis** beside the submission.
3. Click **Send to DocuSign**.

The **Electronic Signature History** pop up opens. The status on the e-signature is **Completed** and **Signed**, because the signatory has signed the document. If the signature is still pending, the status will be **Sent**.