



Enable and Use DocuSign

Help Guide

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Table of Contents

1.	Enable DocuSign Integration.....	2
1.1	Log In to DocuSign.....	3
1.2	DocuSign is Enabled.....	3
2.	Add e-Signature to a Form.....	4
3.	Add Signature to a Template.....	4
3.1	Finish and Upload the Template.....	5
4.	Fill in the Form.....	5
4.1	Submit the Form.....	6
5.	Request the Signature.....	6
5.1	Send the Document to DocuSign.....	6
5.2	Send the Document to the Signatory.....	7
5.3	The Email is Delivered.....	7
5.4	The Signature can be Added to the Document.....	7
5.5	Review the Signature.....	8

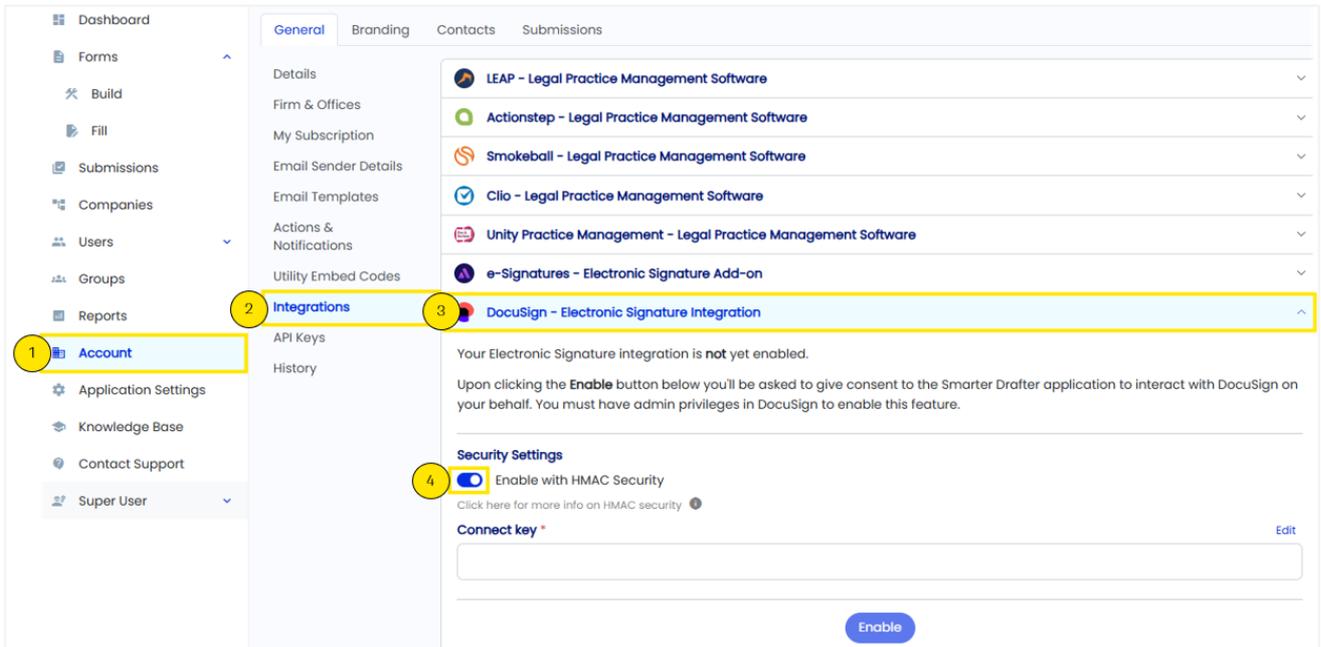
1. Enable DocuSign Integration

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).



The screenshot displays the Smarter Drafter Pro user interface. On the left sidebar, the 'Account' menu item is highlighted with a yellow box and a circled '1'. Below it, the 'Integrations' menu item is also highlighted with a yellow box and a circled '2'. In the main content area, the 'Integrations' tab is active, and a list of various integrations is shown. The 'DocuSign - Electronic Signature Integration' item is highlighted with a yellow box and a circled '3'. Below this list, the 'DocuSign - Electronic Signature Integration' page is displayed. It features a message stating 'Your Electronic Signature integration is not yet enabled.' and instructions on how to proceed. A 'Security Settings' section is visible, with the 'Enable with HMAC Security' toggle switch turned on, highlighted with a yellow box and a circled '4'. Below this, there is a 'Connect key' input field and an 'Enable' button.

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

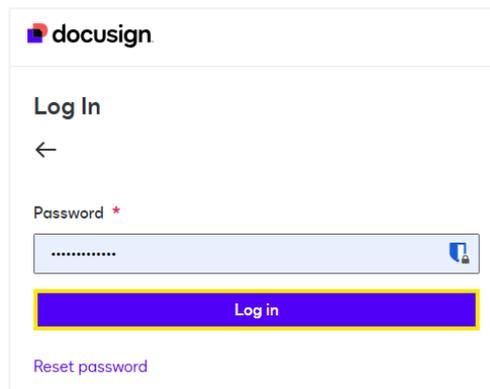
Enable without HMAC Security

[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

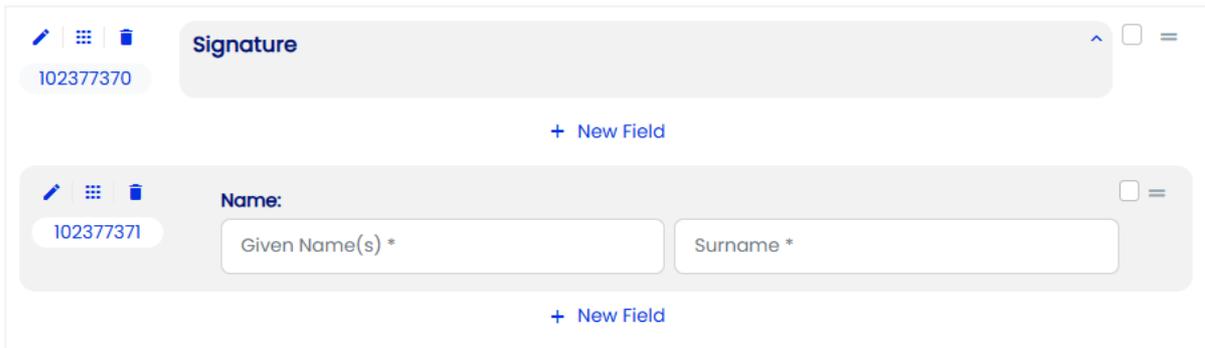
Enable without HMAC Security

[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**.

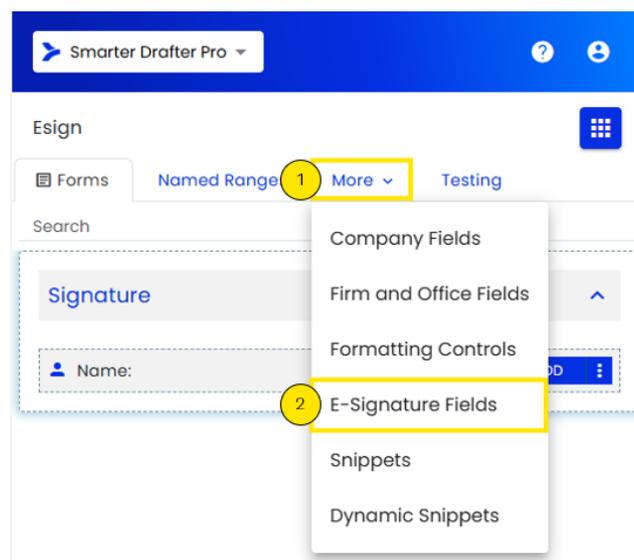


The screenshot shows two panels in the Smarter Drafter Pro interface. The top panel is titled "Signature" and contains a "Name:" label and two input fields: "Given Name(s) *" and "Surname *". The bottom panel is also titled "Signature" and contains the same "Name:" label and two input fields. Both panels have a "+ New Field" button below them.

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.



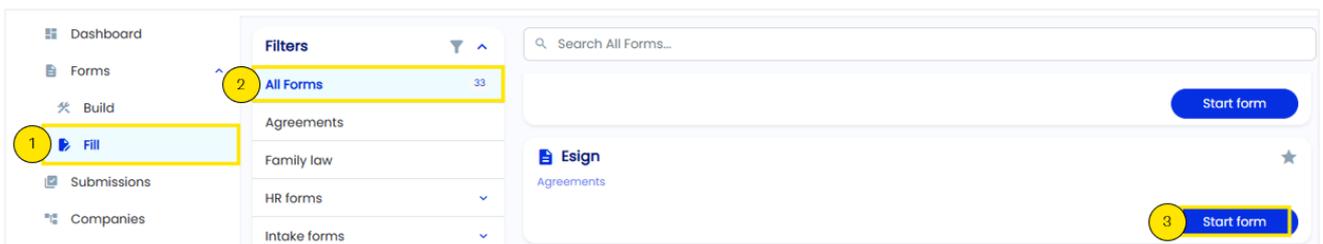
3.1 Finish and Upload the Template

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).



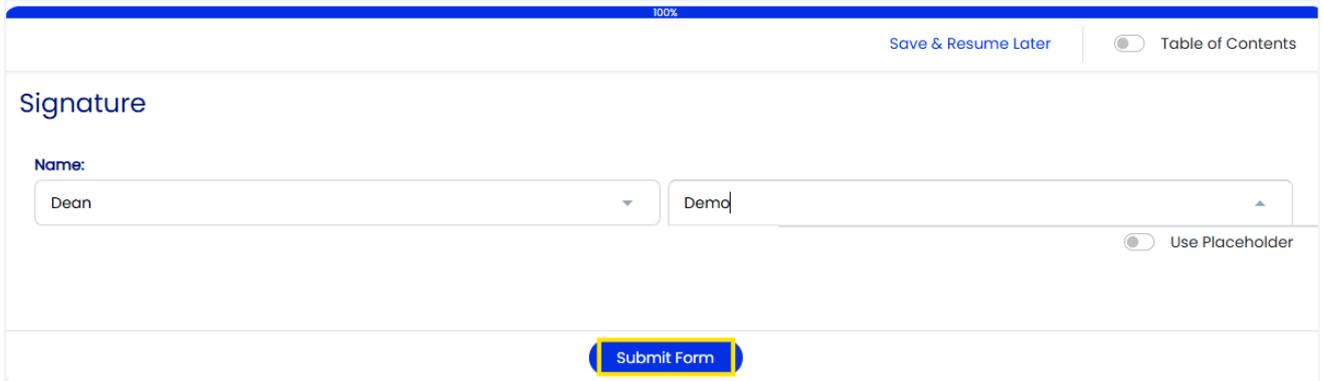
4. Fill in the Form

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**.

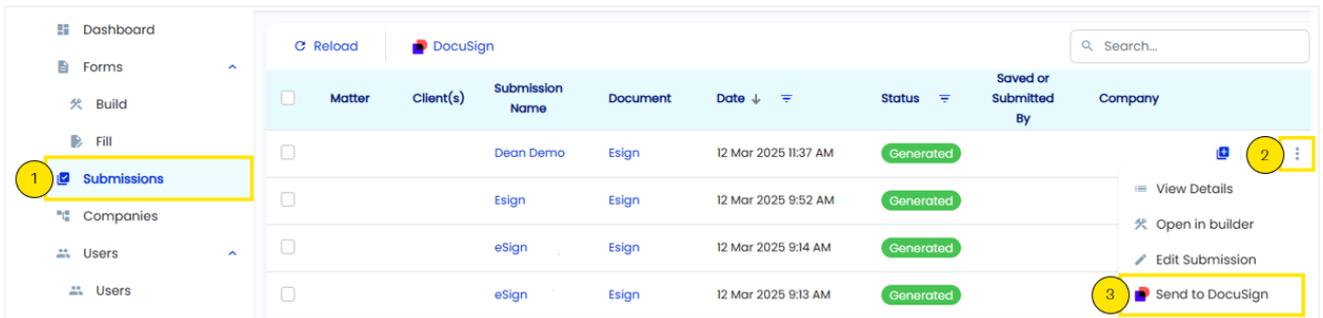


The screenshot shows a 'Signature' form with a 'Name:' label. Below it are two input fields: the first contains 'Dean' and the second contains 'Demo'. To the right of the second field is a 'Use Placeholder' toggle switch. At the bottom center, a blue button labeled 'Submit Form' is highlighted with a yellow box.

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**.

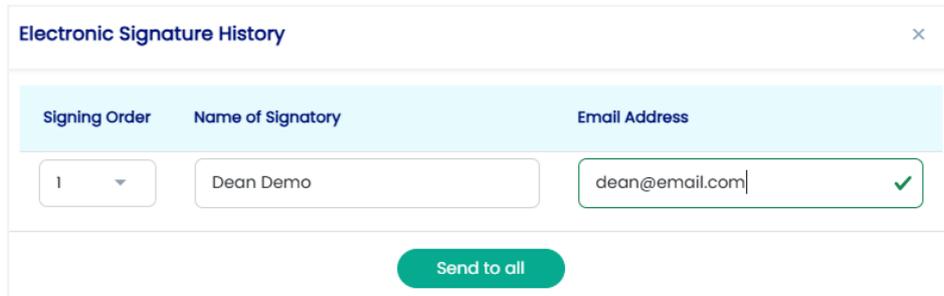


The screenshot shows a navigation menu on the left with 'Submissions' highlighted (1). The main content area displays a table of submissions under the 'DocuSign' header. The table has columns for Matter, Client(s), Submission Name, Document, Date, Status, Saved or Submitted By, and Company. The first row is highlighted, and its ellipsis menu is open (2), showing options like 'View Details', 'Open in builder', 'Edit Submission', and 'Send to DocuSign' (3).

Matter	Client(s)	Submission Name	Document	Date	Status	Saved or Submitted By	Company
	Dean Demo	Esign	Esign	12 Mar 2025 11:37 AM	Generated		
	Esign	Esign	Esign	12 Mar 2025 9:52 AM	Generated		
	eSign	Esign	Esign	12 Mar 2025 9:14 AM	Generated		
	eSign	Esign	Esign	12 Mar 2025 9:13 AM	Generated		

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**.



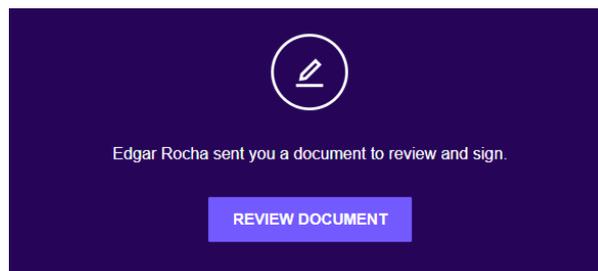
The screenshot shows a pop-up window titled "Electronic Signature History" with a close button (X) in the top right corner. The window contains a table with three columns: "Signing Order", "Name of Signatory", and "Email Address".

Signing Order	Name of Signatory	Email Address
1	Dean Demo	dean@email.com

Below the table is a green button labeled "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

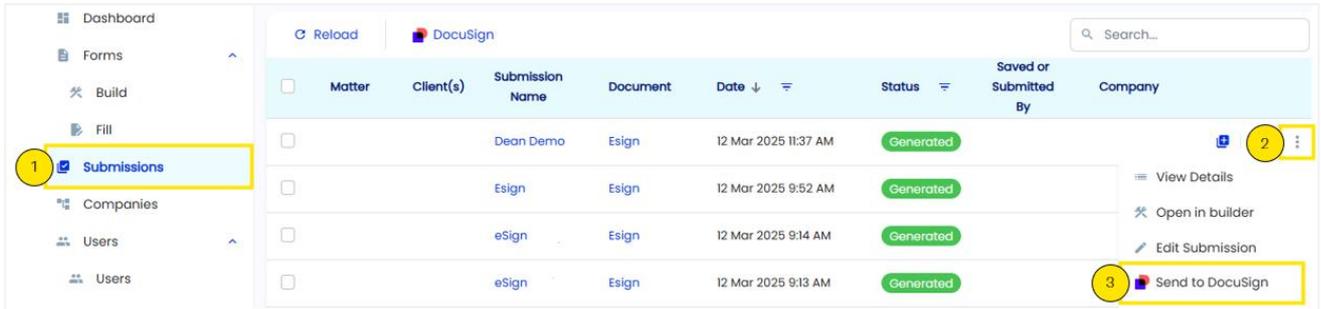
The signatory can sign the document in the e-signature field and click **Finish** to complete the signing.



5.5 Review the Signature

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

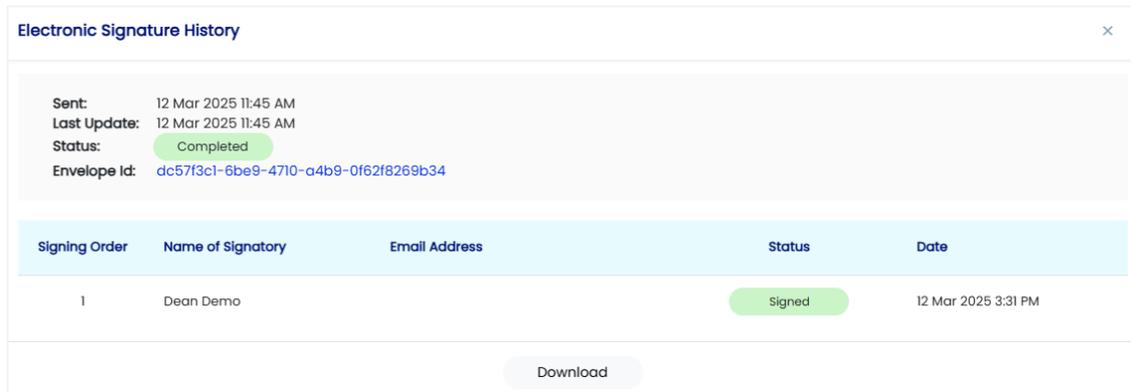
1. Open the **Submissions** list from the navigation menu.
2. Click the **ellipsis** beside the submission.
3. Click **Send to DocuSign**.



The screenshot shows a navigation menu on the left with 'Submissions' highlighted (1). The main table lists submissions with columns: Matter, Client(s), Submission Name, Document, Date, Status, Saved or Submitted By, and Company. The first row is selected, and a dropdown menu is open (2) showing options: View Details, Open in builder, Edit Submission, and Send to DocuSign (3).

Matter	Client(s)	Submission Name	Document	Date	Status	Saved or Submitted By	Company
<input type="checkbox"/>		Dean Demo	Esign	12 Mar 2025 11:37 AM	Generated		
<input type="checkbox"/>		Esign	Esign	12 Mar 2025 9:52 AM	Generated		
<input type="checkbox"/>		eSign	Esign	12 Mar 2025 9:14 AM	Generated		
<input type="checkbox"/>		eSign	Esign	12 Mar 2025 9:13 AM	Generated		

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**.



The pop-up window displays the following information:

- Sent:** 12 Mar 2025 11:45 AM
- Last Update:** 12 Mar 2025 11:45 AM
- Status:** Completed
- Envelope Id:** dc57f3c1-6be9-4710-a4b9-0f62f8269b34

Signing Order	Name of Signatory	Email Address	Status	Date
1	Dean Demo		Signed	12 Mar 2025 3:31 PM

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