POC on ‘DocuSign for Salesforce’

Using the DocuSign® for Salesforce managed package, users can send a document for signatures from within Salesforce and guide signers in the signing process. If you are using the Salesforce Professional, Enterprise, or Unlimited Editions, DocuSign for Salesforce easily integrates into your Salesforce account. DocuSign for Salesforce is available from the AppExchange™.

The general steps for sending a document for guided signing from DocuSign for Salesforce are:

1. From a Salesforce object, select an instance of the Salesforce object to send for signing and create an envelope by clicking the Send with DocuSign button.

2. Add additional documents and set the document order.

3. Add additional recipients and set recipient information.

4. Set reminder and expiration details for the document.

5. Place signature and information tags (fields) on the documents in your envelope.

6. Review and send the envelope.

A DocuSign envelope is a container used to send one or more documents for signature using the DocuSign system. An envelope can have multiple documents and several recipients. The documents in an envelope can have multiple pages.

**Steps to install and Configure DocuSign in salesforce:**

* Go to AppExchange Marketplace and search for ‘DocuSign for salesforce’. Install it in your org using your credentials.
* Open DocuSign e-signature lightning app and navigate to DocuSign admin tab. Sign up and Login to your DocuSign account in the same tab.
* Login with your salesforce credentials and connect.
* Click on DocuSign Admin tab then click on DocuSign sub-tab that will navigate you to DocuSign official site.
* Click on Admin tab and look for Connect in left panel and open it. You will see active salesforce account. Edit the salesforce connection and activate the connect objects – docusign\_Status and docusign\_recipient\_status by clicking on actions dropdown. This will enable you to get the status notification when the document sent is signed.
* Out of the Box for standard object-
  + Go to DocuSign Admin tab and navigate to ‘Layouts’ subtab.
  + Customize the object layout by enabling the classic/lightning buttons and related list.
  + Add the ‘Send with DocuSign’ button and ‘DocuSign status’ related list in the required object layout.

Please refer below URL for more details on installation:

<https://support.docusign.com/en/guides/docusign-for-salesforce-user-guide>

**Set up DocuSign on Custom object:**

To add DocuSign features on custom object there are few steps that needs to be followed-

* Add DocuSign Sending Aura component on your page Layout.
* Created Lookup field on your custom object to relate it to DocuSign status object.
* Create Lookup Field on DocuSign status object and relate it to your custom object
* Update DocuSign Connect.

Please refer all the steps mentioned in below URL to configure Send with DocuSign button and DocuSign Status related list on custom object.

<https://support.docusign.com/en/guides/dfs-admin-guide-add-ds-status-to-custom-object>