

## DocuSign for Sugar 7 – v1.0

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### Overview

This guide provides information on installing and signing documents with DocuSign for Sugar7. The [Release Notes for DocuSign for Sugar 7](#) provide additional release details.

### Supported Versions

DocuSign for Sugar 7 supports the following:

- **Sugar 7:** Professional, Enterprise, and Ultimate Editions, for both On-Site and On-Demand instances
- **Browsers:**
  - Firefox 24, 25
  - Safari 6.0
  - Internet Explorer 9, 10
  - Chrome 30

**Important:** DocuSign for Sugar 7 can only be installed by Sugar administrators. If you have a DocuSign account, the **Account-Wide Rights** and **Send on Behalf Of Rights (API)** features must be enabled for your account.

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## Installing DocuSign for Sugar 7

The DocuSign for Sugar 7 module is available from the DocuSign Partner Solutions Showcase, SugarExchange, or SugarForge. Follow these steps to download and install the package:

1. Get the DocuSign for Sugar 7 module:
  - a. Go to [SugarExchange](#) and locate the DocuSign for Sugar 7 module. You can also download the module from SugarForge or through the link on the [DocuSign Partner Solutions Showcase](#).
  - b. Download the module as a zipped file to your computer.
2. Load the module into Sugar:
  - a. Log in to your Sugar account. On the navigation bar, click the User menu and select **Admin** to go to the Administration Home Page.
  - b. Under Developer Tools click **Module Loader**.
  - c. Click **Choose File** and navigate to the DocuSign for Sugar 7 zipped module file on your computer. Click **Upload**, and the module displays in the bottom panel.
  - d. Click **Install**. The license agreement displays on the screen. Select **Accept** to accept the agreement and then click **Commit** to install the module.
  - e. If the installation is successful, DocuSign for SugarCRM appears in the list of installed extensions.

**Note:** This installation directs your account to the DocuSign Production environment. You can change the environment settings from the Administration Home Page by clicking **DocuSign Settings**, selecting the appropriate environment, and saving the changes. See [FAQs](#) for more information.

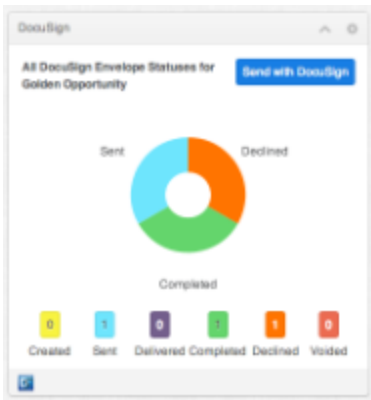
- f. Navigate to an Opportunity, Account, Contact, or Lead and click the **Configure DocuSign** link on the DocuSign dashlet. Follow the on-screen instructions to enter your credentials or create a free DocuSign account.

After you set up your DocuSign account on behalf of your organization, other Sugar 7 users automatically attach their membership to this account the first time they send a document.

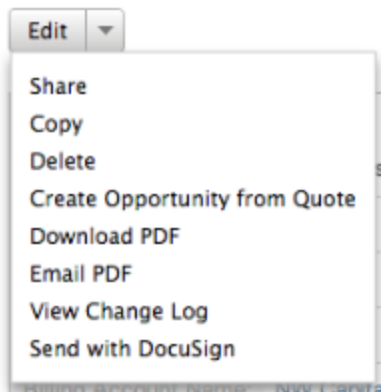
## Sending Documents for Signature with DocuSign for Sugar 7

With DocuSign for Sugar 7, you can add the DocuSign dashlet to any object that supports the dashlet functionality (including custom objects). See FAQs on how to add the DocuSign dashlet to an object.

The DocuSign dashlet is included by default on the Account, Contact, Opportunity, and Lead objects.



DocuSign support for the Quote object is also available through the "Edit" menu on the object.



## 1. Select an Object

- Select an object and open the detail page for the object you want to send documents from.

## 2. Send with DocuSign

- In the DocuSign dashlet in the dashboard section of the object, click **Send with DocuSign**. If you are on a Quotes object, the **Send with DocuSign** button is included in the Edit menu.

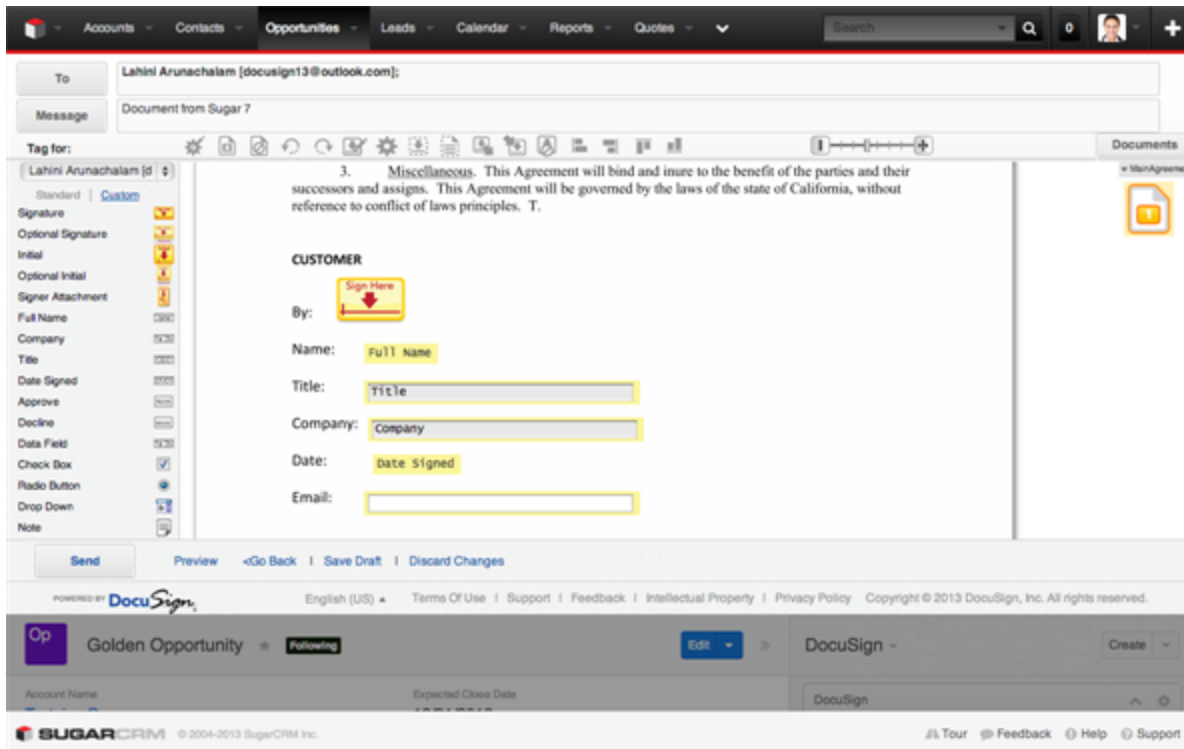
A modal overlay opens and a DocuSign envelope is created. Documents included in the Documents section are automatically included in the envelope for all objects except Quotes.

Additional information is added to the envelope depending on the object type:

- **Opportunity:** Contact(s) associated with the object are added as envelope recipient(s)
- **Account:** Contact(s) associated with the object are pulled in as envelope recipient(s)
- **Contact:** Contact is pulled in as the envelope recipient

- **Lead:** Lead is pulled in as the envelope recipient
- **Quote:** Billing contact is pulled in as the envelope recipient, and a PDF of the quote content is created and used as the document in the envelope; a note is created in the History section of the quote

### 3. Tag and Send Your Documents



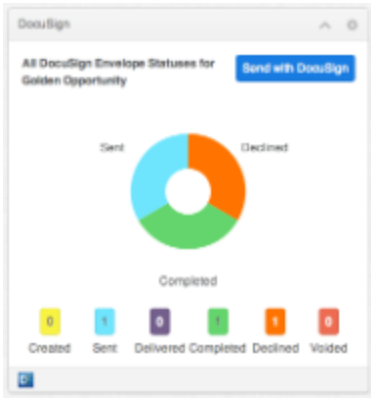
- Drag and drop DocuSign tags from the left-hand palette onto your document. You can modify the envelope by clicking the following:
    - **To** - to add, remove or modify recipients
    - **Message** - to change the e-mail subject and message
    - **Documents** - to add or remove the documents from the envelope

Refer to the *Quick Start – Sending a Document or DocuSign Service User Guide* on the DocuSign website for more details about completing your envelope.
  - Click **Preview** to preview how your recipient will see the tags.
  - Click **Send** to send the document for signing.
- The DocuSign overlay closes and the envelope is sent.

## 4. Done!

You have successfully sent documents attached to an object out for signature using DocuSign.

You can easily track the status of the envelope from the DocuSign dashlet itself. The dashlet displays a chart view of all envelope statuses for that object.



You can also view the envelope statuses in a table view by clicking on the chart displayed in the DocuSign dashlet.

The image shows the same DocuSign dashlet window, but with the table view selected. The table has columns for Envelope ID, Status, and Modified Date. Below the table are navigation links: "Back to chart view", "Previous", and "Next". The legend at the bottom is identical to the chart view.

Envelope ID	Status	Modified Date
1d731d8ee...	declined	Nov 14 2013...
11d1d80c 26...	sent	Nov 14 2013...
3d44e09-14...	completed	Nov 14 2013...

When the envelope is completed, the signed documents are attached to the object as a PDF. You can access this PDF by clicking the **Completed** link in the table view of the DocuSign dashlet.

See [FAQs](#) on how to view the DocuSign envelope statuses on a Quote object.

Refer to the *DocuSign Service User Guide* on the DocuSign website for more information about sending envelopes.

## FAQ

### What are “envelopes”?

- An envelope is an electronic container used to send one or more documents for signature with the DocuSign system. Envelopes can contain any number of pages or documents, and can be sent to multiple recipients.

### How many envelopes can I send from a free account?

- A free trial DocuSign account set up from Sugar can send 50 envelopes for all users in the account.

### How will I know when my trial account is running low on envelopes?

- The DocuSign system provides a warning when your free account is running low on envelopes.

### I’m not the administrator for my Sugar instance; can I still install DocuSign for Sugar 7?

- No, the module can only be installed by administrators.

### Do I have to give the other SugarCRM users my DocuSign credential information so they can send with DocuSign?

- No. If you created a new account, it is automatically setup to allow users in your account to send with DocuSign. If you have a DocuSign account, enable the **Account-Wide Rights** and **Send on Behalf of Rights (API)** features for your account. This allows the other users in your account to send with DocuSign.

Additionally, if your account uses the Password Strength setting **Custom**, you must set the **Password Questions Required** option to **0**. You can check your DocuSign Password Strength setting by going to **Preferences > Features** and, under the Manage Account heading, clicking **Password Strength**.

### Not all of my Sugar users have DocuSign accounts. Can they still use DocuSign for Sugar 7?

- Yes, as long as you have seats available in your DocuSign account. When a Sugar user clicks **Send with DocuSign**, the system checks to see if that user exists in DocuSign. (In this case a user is defined as a unique username/email combination.) There are three possible results:
  1. If the user does not exist as a member of the DocuSign account the system administrator associated with the Sugar instance, and does not have an existing DocuSign account, DocuSign creates a new user with that user's username and email combination and adds that user as a member of the DocuSign account.
  2. If the user does not exist as a member of the DocuSign account the system administrator associated with the Sugar instance, but does have an existing DocuSign account, the user is asked to enter a new username to go along with the new account. DocuSign then creates a new user with that user's username and email combination and adds that user as a member of the DocuSign account.

3. If the user exists in the DocuSign system and exists as a member of the account associated with the Sugar instance, DocuSign uses that information to send the envelope.

#### How do I change the DocuSign environment that my DocuSign for Sugar 7 module is pointing to?

- On the Administration Home Page, scroll to the lower portion of the page and click **DocuSign Settings**.

#### DocuSign

Manage settings for the DocuSign for SugarCRM connector.

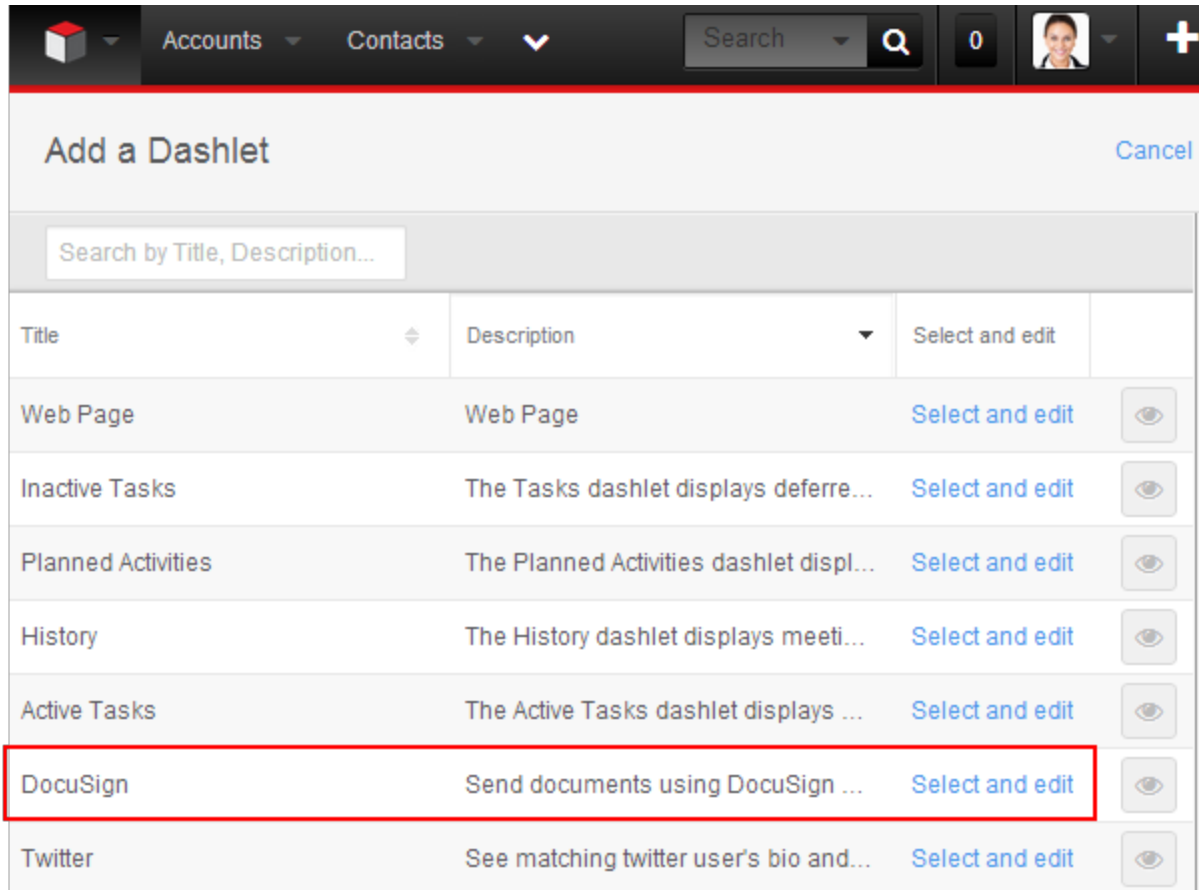


Select the desired DocuSign server from the **Set DocuSign API Environment** drop down. Note that this action also removes the system-wide login. Click **Save** to save the changes.

#### How do I add the DocuSign dashlet to an object?

- If the Sugar 7 dashlet functionality is available on an object, create a new dashboard or go to an existing dashboard. Click **Edit** on the dashboard and click **Add a Row** and then **Add a Dashlet**.

The Add a Dashlet list appears:



Find the DocuSign dashlet and click **Select and edit**, and then click **Save**. The DocuSign dashlet should now appear on your dashboard.

#### Which objects have the DocuSign dashlet displayed on a dashboard by default?

- When a Sugar administrator installs the DocuSign for Sugar 7 module, all users see the DocuSign dashlet on the Account, Contact, Lead, and Opportunity objects under the DocuSign dashboard.

**Note:** Any users created after the admin installs the DocuSign module will have to manually add the DocuSign dashlet to these objects.

#### What are the differences between the DocuSign dashlet I see on the Home page, on an object's list view, and on an individual object?

- The DocuSign dashlet can appear in a variety of places within Sugar 7:
  - **DocuSign Home Page dashlet** - displays the DocuSign envelope statuses for the envelopes you have sent across all objects
  - **DocuSign dashlet on an object's list view** - (e.g. when the user clicks the "Leads" tab) displays the DocuSign envelope statuses for the envelopes you have sent across all objects



of that type (e.g. all leads)

- **DocuSign dashlet on an individual object's dashboard** - displays the DocuSign envelope statuses for the envelopes any user has sent from that particular object. You can find the **Send with DocuSign** button only on this view of the dashlet.

#### How do I view my DocuSign envelope statuses for a Quote object?

- Quote objects do not yet include the dashlet functionality. You can view the statuses of envelopes sent from a Quote by scrolling down to the DocuSign Statuses list view at the bottom of the record.

#### How often are my DocuSign statuses updated?

- If you are a Sugar 7 on-demand customer, the DocuSign statuses are refreshed instantaneously. If you are a Sugar 7 on-site customer, you must setup a scheduled job to retrieve DocuSign statuses. In this job, you can specify how often you would like the statuses to update.
- To setup the DocuSign scheduled job:
  1. On the navigation bar, click the User menu and select **Admin** to go to the Administration Home Page.
  2. Under System, click **Scheduler**.  
The Schedulers list appears.
  3. On the navigation bar, under Sugar Scheduler, select **Create Scheduler**.
  4. In the Job Name field enter a scheduler name; in the Job drop-down select **DocuSign Sweeper**.

- Choose the desired refresh interval and click **Save**.

### Create

The screenshot shows a 'Create' job configuration form. At the top, there are 'Save' and 'Cancel' buttons. Below them is a form with the following fields and options:

- Job Name:** \* DS Minute Refresh
- Status:** Active (dropdown)
- Job:** DocuSign Sweeper (dropdown)
- Advanced Options:**
- Interval:** \* Every 1 Minutes (dropdown)
- Days of the week:**
  - Every Day
  - Monday
  - Tuesday
  - Wednesday
  - Thursday
  - Friday
  - Saturday
  - Sunday

At the bottom of the form, there is an 'Advanced Options' section with a chevron icon and another set of 'Save' and 'Cancel' buttons.

- Select **Sugar Scheduler > Schedulers** to return to the list of Schedulers. Below the list, you should see the commands needed to add to a batch file used to run Sugar Schedulers.
- To setup up a batch file in order to run scheduled jobs:
  - You must be on the server that SugarCRM is running on.
  - Open command prompt and navigate to the sugarcrm directory.
  - Run the job `sudo php -f cron.php > /dev/null 2>&1`

### I am having trouble sending a Quote for signature from Safari 6.0. What should I do?

- Go into Preferences in Safari. Click **Privacy** and set **Block Cookies: Never**.

### I have three documents attached to an object, but I only want to send two of them. How do I remove the other document?

- From the DocuSign dashlet, click **Send with DocuSign**. In the new browser window, click **Documents**, and then click the **remove** icon for the document you do not want to send.

### I have custom Quote templates in Sugar; which templates do DocuSign envelopes use?

- DocuSign is set to use the default template.

### How do I uninstall DocuSign for Sugar 7?

- To uninstall DocuSign for Sugar 7:
  - On the Administration Home Page, under Developer Tools, click **Module Loader**.
  - Locate DocuSign for Sugar 7 in the list of installed extensions and click **Uninstall**.

## Module Loader

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type	Version	Date Installed	Sign
DocuSign for Sugar 7	Uninstall	Disable	module	1.0.0	11/19/2013 02:44pm	Sign

### I love this! How do I write a review for DocuSign for Sugar 7?

- We are always happy to receive feedback. To add a review, go to the SugarExchange and find the DocuSign for Sugar 7 module. Click the **Reviews** tab and then click **+ Add Review**.

Thanks for submitting your review!

## Release Notes

The following new features are included as a part of DocuSign for Sugar 7 1.0:

- Drag and drop the DocuSign dashlet on any object, including custom objects
  - When DocuSign for Sugar 7 is installed, the DocuSign dashlet is included by default on the Account, Contact, Lead, and Opportunity objects
  - DocuSign is supported for the Quotes object in the "Edit" drop down on a Quote record
- Send documents for signature directly from the dashlet by using the familiar DocuSign interface to specify recipients, define signing workflow, and add or edit tags within Sugar 7
- View envelope statuses from the DocuSign dashlet in both a chart and table view for a summary of where your documents are in the signing process
- Get alerts on document status changes from your activity feed
- View signed documents that are automatically stored as PDFs onto the originating record in Sugar 7
- Get a view into the statuses of all of the envelopes you sent from Sugar 7 from the DocuSign Home page dashlet

## For More Information or Assistance

For more information or assistance, visit [DocuSign Support](#), the [DocuSign Community](#), [docusign.com](#), or contact DocuSign Support.