# USER GUIDE

# USING DOCUSIGN IN DASH

May 2024

# Prerequisites

To be able to use DocuSign in DASH, you will need to have an existing account with DocuSign.

If you do not currently have an account with DocuSign, you will need to sign up to DocuSign before you will be able to use the DocuSign app in DASH.

The Docusign App from the Store will also need to be subscribed to.

## What this integration includes

DASH connects with DocuSign to allow you and your clients to electronically sign documents such as a generated SOA from DASH. Once the document(s) have been signed by all parties, you will be able to pass the signed document back to the client's file note in DASH.

## Contents

# Launching DocuSign in DASH

1. From within a Contact in DASH, select the **Apps Panel**
2. Select the Docusign app > Launch
3. A new window will open, requesting sign in details to Docusign

# Using DocuSign

Once you have signed in, you will be shown the DocuSign Envelopes screen which is where you will be able to create and view the DocuSign Envelopes you have sent to the selected contact.

## Creating a DocuSign Envelope

You can create a DocuSign Envelope that you want to send off to your client(s), by doing the following

1. Select **CREATE** at the top right of the screen
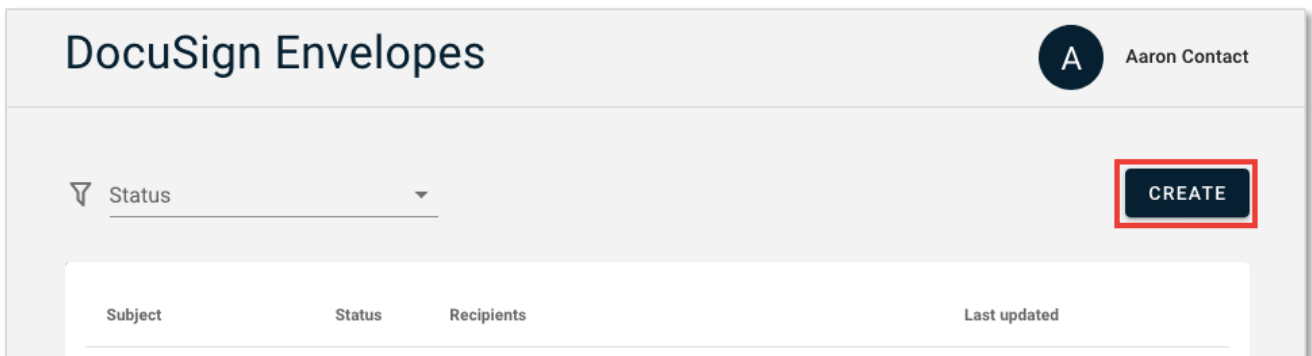


2. In the displayed overlay you will need to enter a **Subject (a)** and also specify the **Recipients (b)**

   - For the subject, just add subject name to allow you to identify what document is being sent.
   - Recipients will automatically pull the email address if that has been included for the contact in ROAR. You can remove a recipient by clicking on the **X** or add additional recipients by clicking on **+ ADD NEW RECIPIENT**.
   - You can edit the name and email of the recipients should that be necessary.
   - You can also specify if each recipient needs to sign via the drop-down which allows you to pick between **Signer** and **CC**. Signer is intended for a person who needs to sign the document.
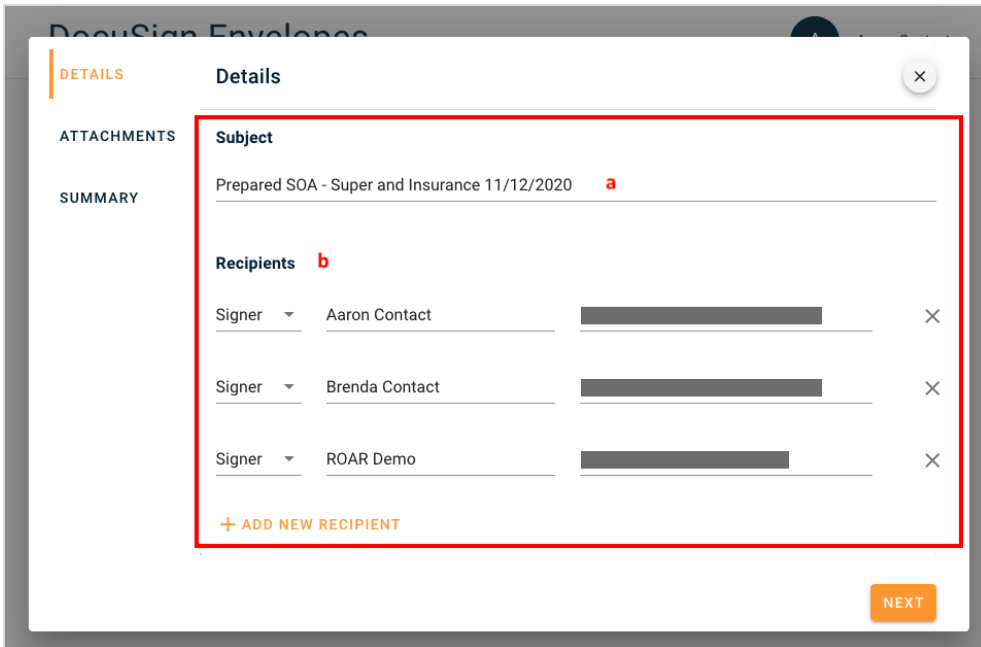
3.  Click on **NEXT** located at the bottom right to head over to the Attachments section

    - When adding an attachment, you will have two options which are covered in the following Attachments section. Please refer to the following section for more information.

## Attachments

In attachments, you will be a able to upload the file you want to attach. There are two options for uploading an attachment. One is **From Local File** (your computer) and the other is **From File Note** which allows you to select the a file from the contact's file note in DASH.

The location of the attachment is controlled by the **Choose From** toggle, which is by default set to **From Local File**. You can click on the toggle will change the setting to **From File Note**.
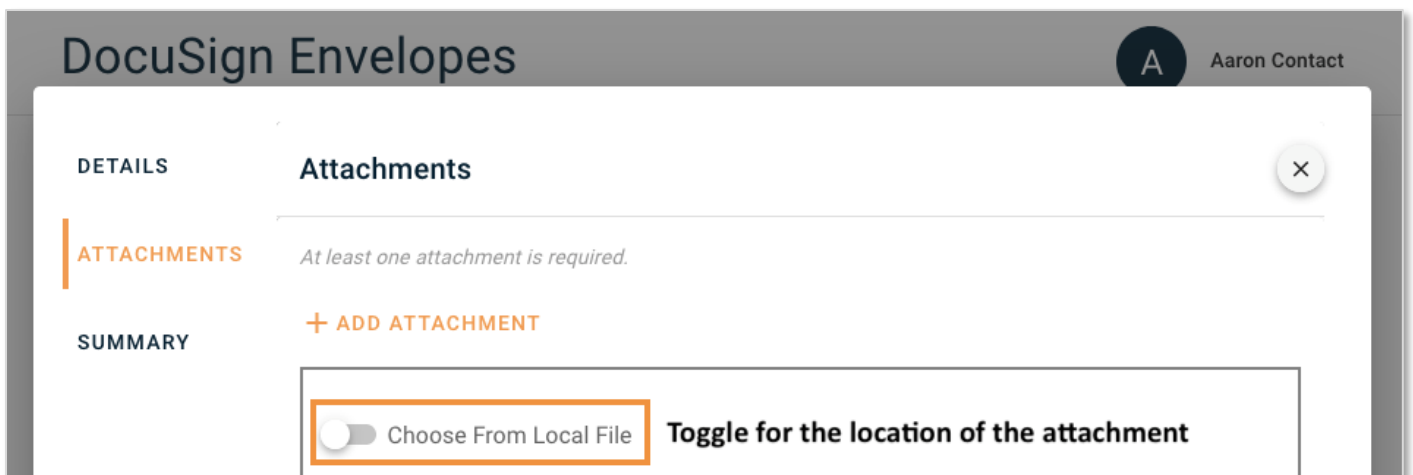
## From Local File

If the attachment you want to add is from your local files, you can add a file by doing the following:

1.  In Attachments, Select **+ ADD ATTACHMENT**

2.  Select **Upload file** text or the **paperclip** icon.
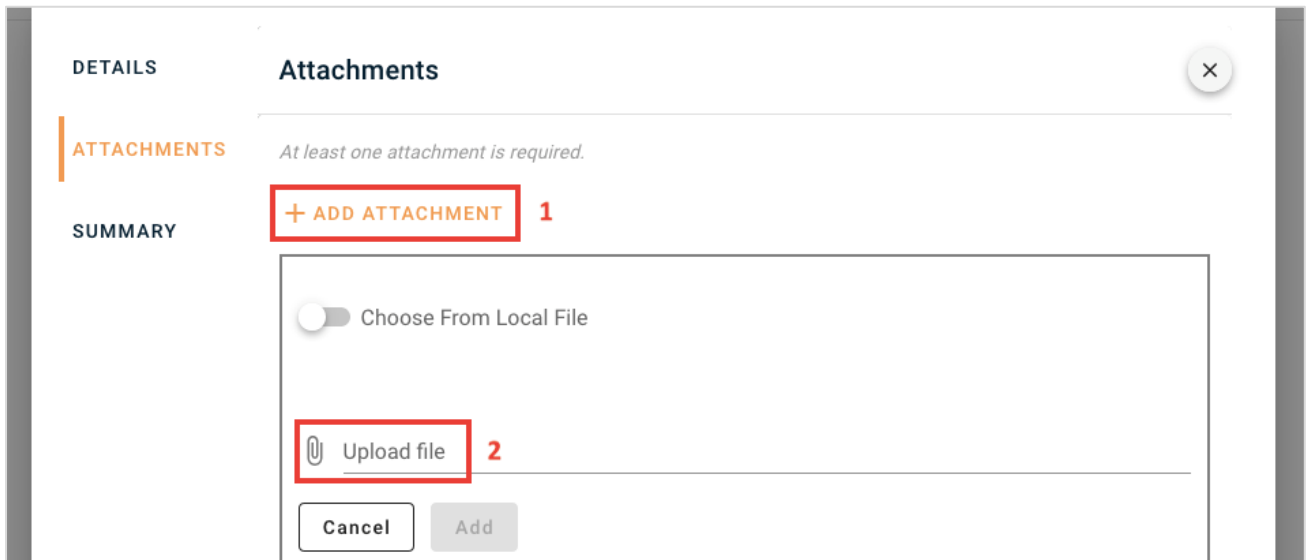


3.  Select the file that you want to add as an attachment

4.  After selecting the file you want uploaded, click on **Add**

## From File Note

If the attachment you want to add is from the contact's File Note in DASH, you can add the file by completing the following steps:
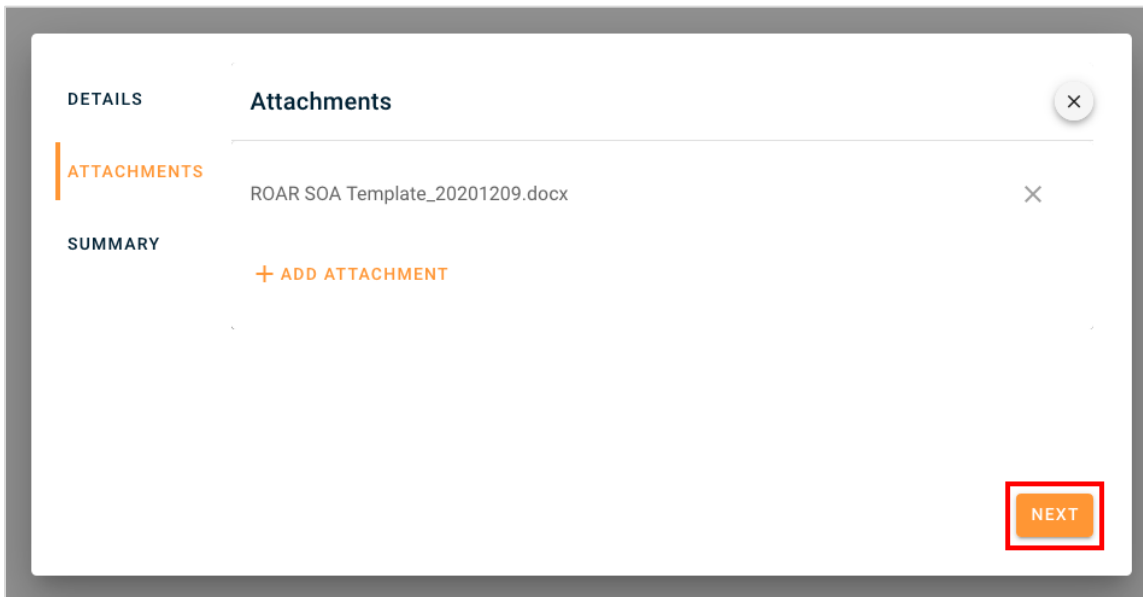
1.  In Attachments, click on **+ ADD ATTACHMENT**

2.  Click on the **Choose From** toggle to set it to **From File Note**
3.  Use the **File Notes** drop-down to select the Subject of the file note that contains the file you want to attach

4.  Select an attachment via the Attachments drop-down
    -  The drop-down options will display all the files that can be used as an attachment from the specified File Note.
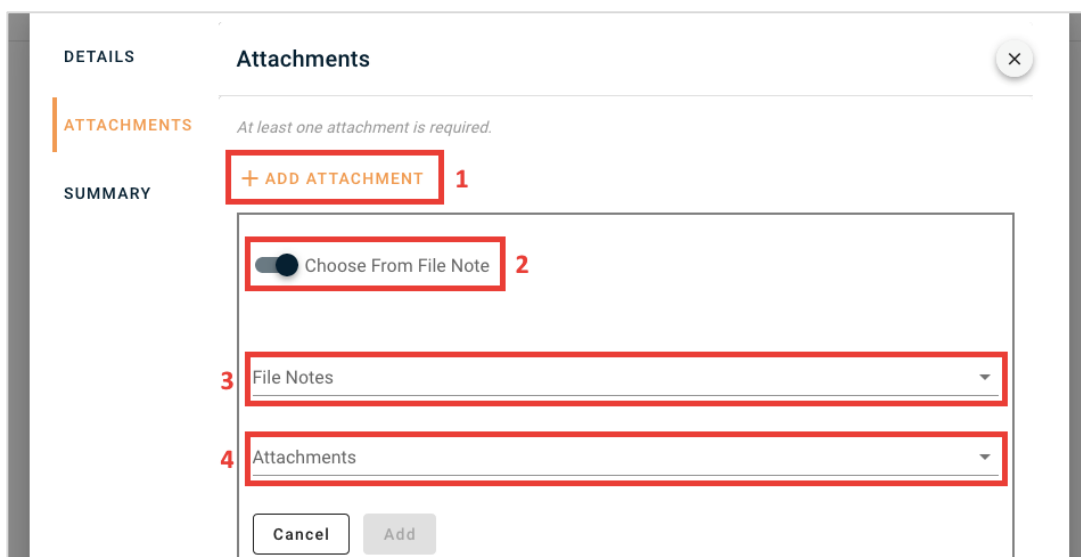


5.  After selecting the file you want uploaded, click on **Add**

**After Adding an Attachment**

Once all the attachments have been added, click on **NEXT** to move on to the Summary section.



**Note:** You can attach additional documents by clicking on **+ ADD ATTACHMENT**. If you want to remove an attachment, you can click on the **X**.

## Summary

The Summary screen is where you will be complete the process of creating a DocuSign Envelope. You will have two options, **CREATE ENVELOPE** and **CREATE EVELOPE AND SEND**.

- **CREATE ENVELOPE:** This will create DocuSign envelope and bring you to DocuSign sender view. DocuSign sender view is where you will be able to further edit the document options such as specifying signature location. You will then be able to send to recipients once ready.

- **CREATE ENVELOPE AND SEND:** This foregoes the sender view so you won't be able to use the document options such as specifying the signature location in the document and the document will be sent as is. This will create DocuSign envelope and send to recipients.

## DETAILS

## ATTACHMENTS

## SUMMARY

# Summary

**Subject**
Prepared SOA - Super and Insurance 11/12/2020

**Recipients**
Signer: Aaron Contact <​ ​>
Signer: Brenda Contact <​ ​>
Signer: ROAR Demo <​ ​>

**Attachments**
ROAR SOA Template_20201209.docx

> ℹ️ **Create envelope:** This will create DocuSign envelope and bring you to DocuSign sender view to further edit the document options such as specifying signature location. You can send to recipients once ready.
> **Create envelope and send:** This will create DocuSign envelope and send to recipients.

**CREATE ENVELOPE**   **CREATE ENVELOPE AND SEND**

# Save Completed Document to File Note

## Save to File Note

Once all parties have signed the document, you will be able to save the signed document back to the contact's file note back in DASH. This option is only available when the status for the envelope is **'Complete'**.
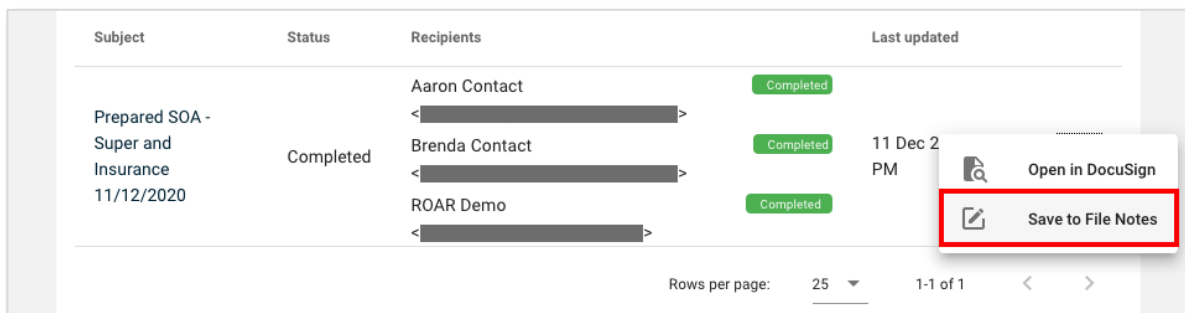
You can save the signed document back to DASH by doing the following:

1.  Select the **3 horizontal dots**
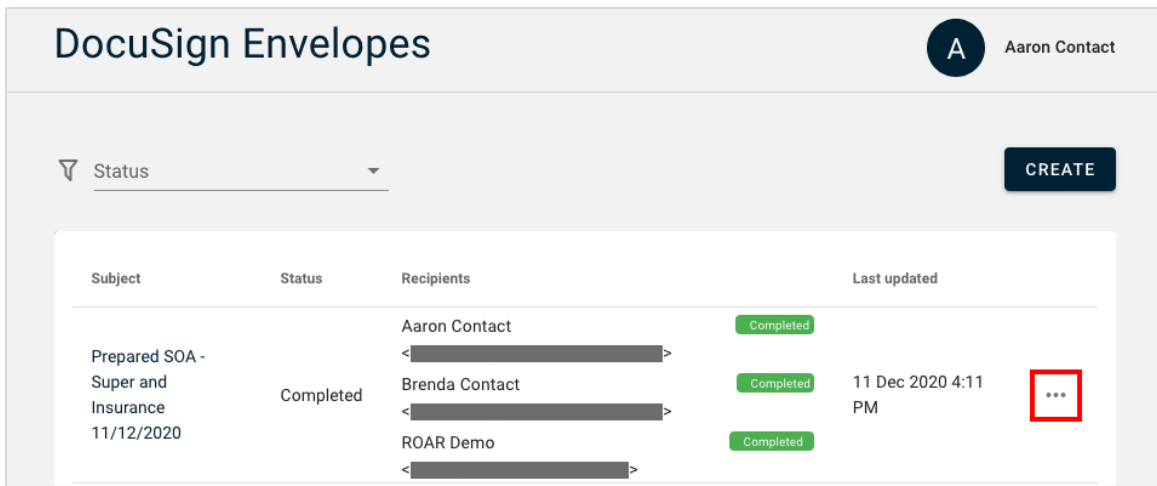


2.  Click on the **Save to File Notes** option

    - Option is only available when the document status is 'Complete' which is when all parties have signed the document.



3.  When saving to File Note, you can either **Create a File Note** or **Select File Note**

    - Create a File Note is the option to select if you would like to save the document to a new file note.
    - In the event that you want to save to an existing file note, you will need to click on the toggle to set it to **Select File Note** which will allow you to select an existing file note subject to save the document in.

4.  Click on **Save**, this will save the document back to the contact in DASH.

    -  If you have opted to create a new file note, the document(s) will be contained within the file note with the Subject that you had entered.
    -  If you had specified an existing file note to save the document(s) back to, they will be contained within the file note you had specified.

## Viewing File Notes

After using the Save to File Notes option, you will be able to see the document(s) via the **File Notes** tab in the selected contact. You will need to click on the subject and any attachments should be visible in comments of the subject. Attached documents can be downloaded by clicking on the attachment link.