DocuSign Integration

Objectives

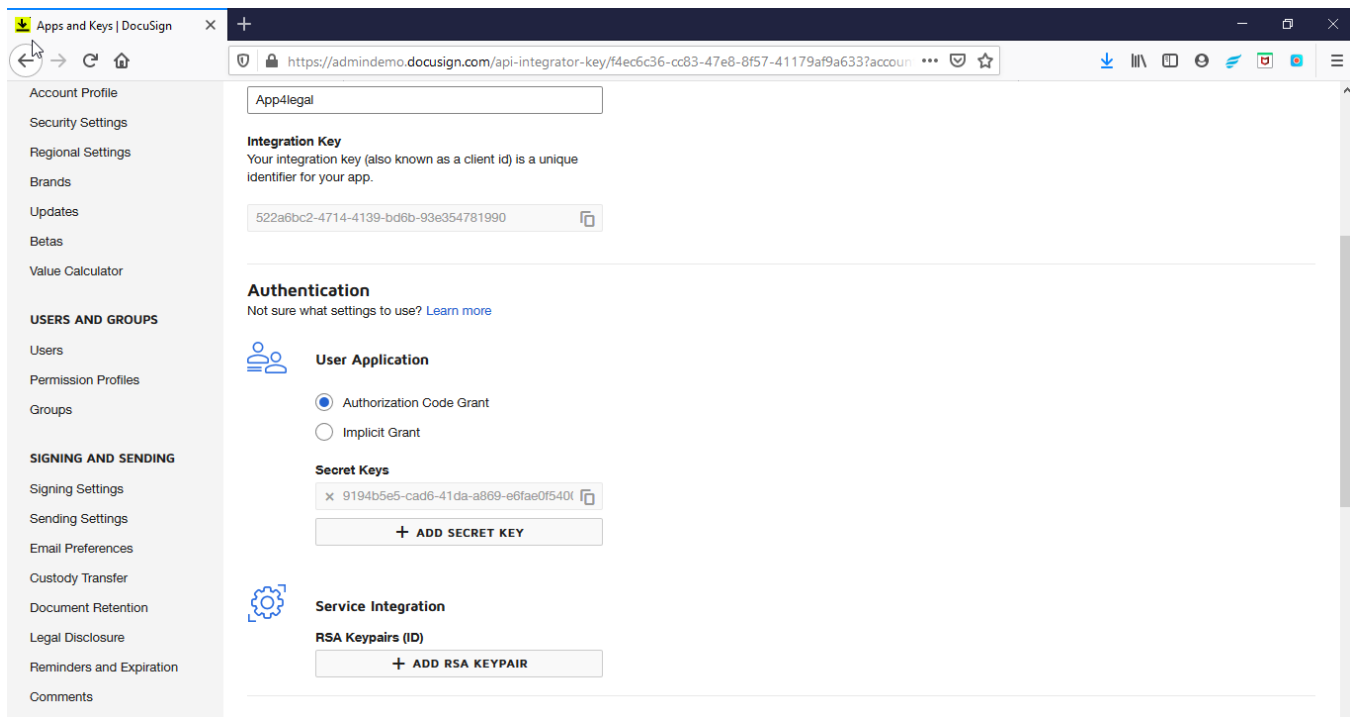- Setup the integration between LEXZUR and DocuSign

Steps

In LEXZUR, you can set up the integration between LEXZUR Contracts/ Documents and DocuSign.

Create a DocuSign application

Let's jump straight into creating your **developer** account in DocuSign.

- Go to https://account-d.docusign.com
- Click on "No account? Sign up for free"
- Activate your account
- Login through https://account-d.docusign.com
- Go to Settings
- Scroll down and click on "Apps and Keys" in the left-side menu
- Click on the button "Add APP & Integration Key"
- Name your App Name then press "Add API Integration Key"
- Click on "ADD secret key" (keep the default "Authorization Code Grant" selected)

- Login to your LEXZUR instance, and go to "Setup & Configuration" under "System Preferences" on the Settings page
- Copy your "Integration Key" and paste it into the "DocuSign integration key" under the DocuSign Integration tab
- Copy your "Secret Key" and paste it into "DocuSign integration key's secret" under the DocuSign Integration tab
- Copy this link "https://account-d.docusign.com" and paste it into "Login server" under the DocuSign Integration tab
- Save all

Property	Default Value	Actions
Login server	https://account-d.docusign.com	Save
DocuSign integration key	e8389ab7-999c-4af1-8f1a-e8166c4f06d5	Save
DocuSign integration key's secret	2f793b51-064a-46b8-a91c-1f18f422db24	Save
Email Template Message	Dear, Please sign the following document	Save
Email Template Subject	Agreement for Signature	Save

Active Directory
Advisor Portal
Contract Default Values
Client Portal
Default Values
DocuSign Integration
External Links
Hearing Verification Process
Maker Checker Control
Menu External Links
Notifications
Outgoing Mail
Password Policy
Reminders
System Values
Web Hooks

Save All

- Go back to the App you created in DocuSign, and from the Additional Settings, add 2 URIs (your instance URLs then modules/contract /docusign_integration/call_back & your instance URLs then modules/customer-portal/docusign_integration/call_back)
- Save

Service integration

RSA Keypairs (ID)

+ ADD RSA KEYPAIR

Additional settings

Redirect URIs

✕ https://www.app4legal.com/test/app4legal-instances/5823/modules/contract/docusi

✕ https://www.app4legal.com/test/app4legal-instances/5823/modules/customer-portal

+ ADD URI

Link to Privacy Policy

http://www.example.com/privacy

Now to move to the **production** account, do the following steps:

⚠ Note that You need to have a paid account

- Go to Settings in your LEXZUR instance, click on the "Docusign integration" link under the Contracts & Documents section
- Go to https://account-d.docusign.com and login
- Go to "Apps and Keys" in the left-side menu
- Click on the Actions for your created application and choose "View API Dashboard"

Apps and Keys

When building a DocuSign integration, you must first create an app and integration key. This key is required to call any DocuSign API, either directly or by using an SDK.

Create apps and keys manually or edit keys created automatically for you by Quickstart.

⌃ My Account Information

User ID	API Account ID	Account Base URI
ce17f062-ab3c-4240-9e50-2d54f80a5ce0 ⧉	0156e7a0-8335-44d3-9e72-35bde6c79f7c ⧉	https://demo.docusign.net ⧉

Apps and Integration Keys

ADD APP

App Name	Integration Key	Environment	Go Live Status	
App4Legal	c4cb7c14-f5f9-494d-822d-8eed5a622889	Development	● Submit for review	
Times Education	e8389ab7-999c-4af1-8f1a-e8166c4f06d5	Development	● Not started Make 20 successful API calls	ACTIONS ▾

Edit
Start Go-Live review
View API Dashboard ⇐
View Details
Delete

2 **0** **0**
Applications Successful Requests Failed Requests

Average Response Time over last 10 days

Not Enough Calls for Review ✕

Number of calls made in the last 30 days:
0

Go-live requirement:
Most recent 20 calls must be successful

Troubleshooting guide

ⓘ If you have already made calls, wait for 15 mins and try again.

VIEW DASHBOARD   CANCEL

- You should see there are more than 20 successful total requests (This may take up to 5 minutes)
- Go back to "Apps and Keys"
- Click on the Actions for your created application and choose "View API Dashboard"

Confident cases
Account ID: 15562132

Apps and Keys › API Dashboard

API Dashboard

Filter, sort, and view API usage for all active apps on this account.

REQUESTS   RESPONSE TIMES

Overview

ACCOUNT

Plan and Billing
Account Profile
Security Settings
Regional Settings
Brands
Updates
Value Calculator

USERS AND GROUPS

Users
Permission Profiles
Groups
Signing Groups

SIGNING AND SENDING

Signing Settings
Sending Settings
Identity Verification

View and filter API call request data.

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🔍 Integration Key is e8389ab7-999c-4af1-8f1a-e8166c4f06d5 ✕   Add Filter   LAST 30 DAYS ▾

Request volume over the last 30 days   ⋮

Show	Group By	Display as
All Responses ▾	Response Type (successful, failed requests) ▾	Area graph ▾

25 **0** **25**
Successful Calls Failed Calls Total Calls

— Success — Failed — Total

25
20
15

- The Go-live status will be changed to "Submit for Review"
- Click on the Actions for your created application and choose "Start Go-Live Review " then "Submit For Review" (it will take up to 20 minutes)

Request App Review

Requirements to pass review:

○ Complete 20 consecutive successful API calls in the past 30 days

○ Use OAuth 2.0 or App Password (for eSignature SOAP API only)

○ Comply With DocuSign API rules and limits.

ⓘ Reviews may take up to 20 minutes.

SUBMIT FOR REVIEW CANCEL

- The Go-live status will be changed to "Review Pending"
- Check the status after 20 minutes, it should become "Review passed". Now you have to Promote to Production.
- Click on the Actions for your created application and choose "Review Results"

- Click on "Select Production Account"

Review Results

×

Requirements to pass review:

✓ Completed 20 consecutive successful API calls in the past 30 days

✓ Uses OAuth 2.0 or App Password (for eSignature SOAP API only)

✓ Complies With DocuSign API rules and limits.

ⓘ Reviews may take up to 20 minutes.

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SELECT PRODUCTION ACCOUNT   CANCEL

- A new dialog will open, login in with your production account (paid one), and wait till your application is reviewed and approved.
- The Go-live status will be changed to "Pending Approval" and the review may take up to 48 hours
- After that go to the "Setup & Configuration" under "System Preferences" on the Settings page
- Change the "Login server" under the DocuSign Integration tab to "https://account.docusign.com"
- Log in with your paid account using the link https://account.docusign.com
- Copy your "Integration Key" and paste it into the "DocuSign integration key" under the DocuSign Integration tab
- Add a secret key then copy your "Secret Key" and paste it into "DocuSign integration key's secret" under the DocuSign Integration tab
- Add 2 URIs (your instance URLs then modules/contract/docusign_integration/call_back & your instance URLs then modules/customer-portal/docusign_integration/call_back)
- Save

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!