



DocuSign

Securely send/receive documents

Robin Biffath

Catch me if you Can



Sometimes it feels like-

They never got it

OR

Have they even looked at the Quote/Proposal

OR

“ Yep we are good to go BUT...I'll scan when I get in the office”
Then nothing for days







Sending the request

Processing DocuSign From the system

Make it easy

- From a Quote/Proposal click the Print button
- Mark the email box
- Select whatever print option desired
- On the next screen click Continue

Select From The Print Options Below

 Itemized Standard	 Non-Itemized Description	 Job Mail All	 Shipping Label
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Additional General Print Options

<input checked="" type="checkbox"/> Print Material Description	<input checked="" type="checkbox"/> Print Line Item Notes
<input checked="" type="checkbox"/> Print Labor Description	<input type="checkbox"/> Print Additional Conditions
<input type="checkbox"/> Print Found Records	<input type="checkbox"/> Print Builder Participation

Additional Unit Print Options

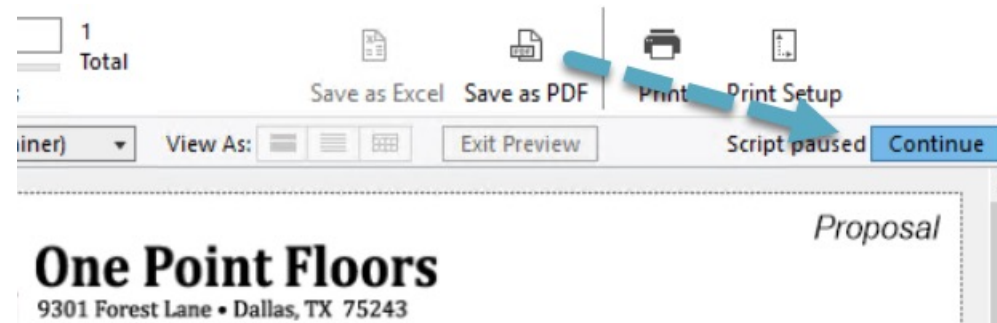
<input type="checkbox"/> Print As SY	<input checked="" type="checkbox"/> Print As Displayed	<input type="checkbox"/> Print with Alternates
<input type="checkbox"/> Print As SF		<input checked="" type="checkbox"/> Show Totals
		<input type="radio"/> Summary
		<input checked="" type="radio"/> Detail

Additional Non-Itemized Print Options

<input type="checkbox"/> Grand Total Only	<input checked="" type="checkbox"/> Detailed Totals
<input type="checkbox"/> Partial Detailed Totals	

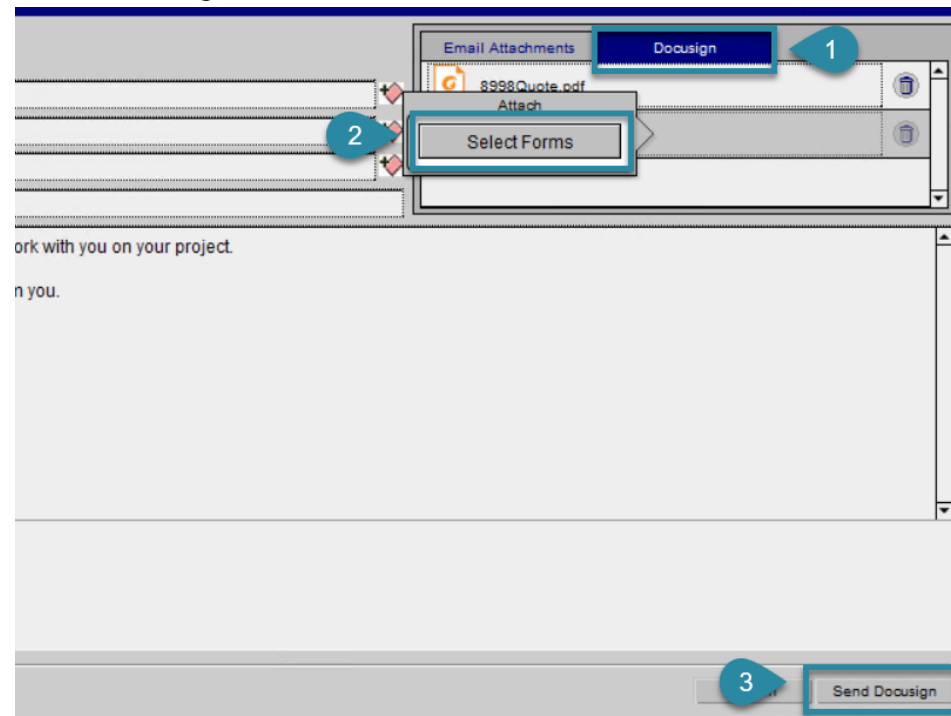
Language Print Option

USA Email



Generate the DocuSign Request

1. Note the Quote/Proposal is already attached
2. Select any additional forms you wish to attach (such as a Letter of Transmittal)
3. Send DocuSign



Generate the DocuSign Request



Fill in the Recipients email address

A screenshot of a software dialog box titled "Assign Recipients for DocuSign". The dialog has a dark blue header with the title in white. Below the header, the word "Buyer" is positioned to the left of a text input field. The input field contains a blurred email address and has a small 'X' icon in its top right corner. Below the input field are two dark blue buttons with white text: "Cancel" on the left and "Continue" on the right.

DocuSign Login



The DocuSign Login screen will automatically launch
Fill in all the details...

DocuSign

Log in to DocuSign

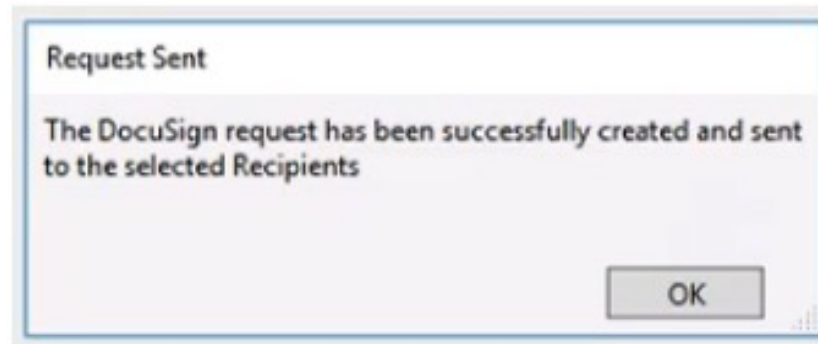
Enter your email to log in.

Email *

Confirmation



Once the form(s) have been submitted by DocuSign's web sight, the system will alert you that the DocuSign Request has been processed.





Tracking the Request

Has the Customer completed the DocuSign

Tracking the Status



Using the CRM tab the status can easily be checked
Use the magnifying glass on the left to access details

Quote *One Point Floors 2 DEV* 1 of 1 1014

Proposal For: CALIFORNIA TREATMENT CENTER, 4365 EXECUTIVE DRIVE, STE 1600, SAN DIEGO, CA 92121

Contact / Phone: [Redacted]

Ship To: Capitol Investments, 1450 Jeppesen Street, Connifer, CO 80125

Community / Plan: [Redacted]

Proposal #: 10158, Customer PO: [Redacted], Date: 10/29/2021, Contract #: [Redacted], Store: One Point Floors 2, Entry Person: Tim Noe, Marketing Source: Constant Contact, Market Sector: Corporate TI, Sales Person 1: Davey Jones, Sales Person 2: Matt Stevens

Entry CRM Activities Upgrades Bundle Alternates Profits Job Mail Forms

PENDING Check Mail Activities List

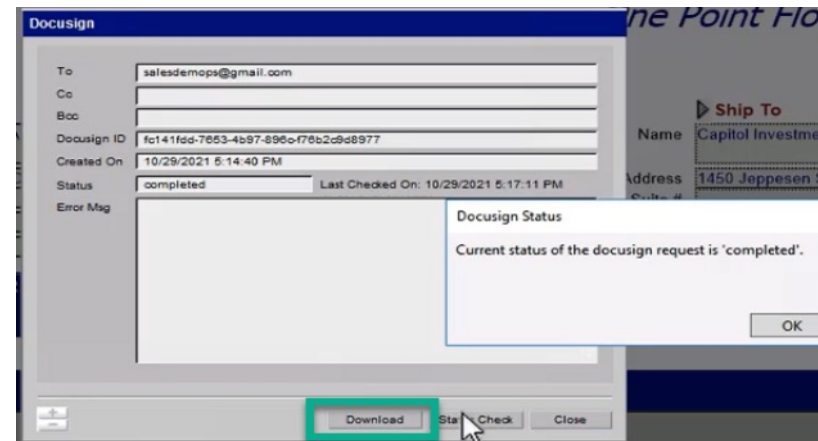
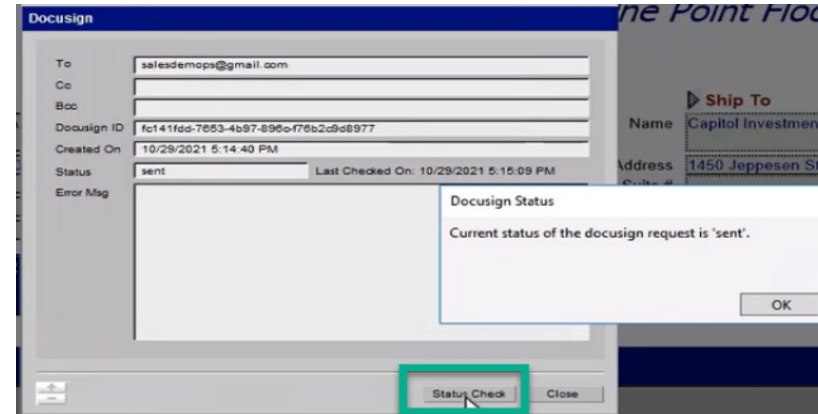
Due Date	Due Time	Assigned To	Type	Text	Next Action	Created From	Completed
		Tim Noe	Docusign	Sent		Proposal #10158	

HISTORY

Date	Assigned To	Type	Text	Created From
10/29/2021	Tim Noe	Outgoing Email	To: salesdemops@gmail.com Subject: Quotes10158 Text:	Proposal #10158
10/29/2021	Tim Noe	Outgoing Email	To: Subject: Quotes10158 Text:	Proposal #10158

Checking the Status

- Click Check Status to send the request to DocuSign
- Once the Download is available the button will appear



Document(s)



The downloaded document(s) are held on the Forms tab > Docs Area

Forms *One Point Floors 2 DEV* 1 of 1 1014

Proposal For **Contact / Phone**

CALIFORNIA TREATMENT CENTER
4365 EXECUTIVE DRIVE
STE 1600
SAN DIEGO CA 92121
Fax

Ship To **Community / Plan**

Name: Capitol Investments
Address: 1450 Jeppesen Street
Lot / Suite #
City, State, Zip: Connifer CO 80125
Phone

Proposal # 10158
Date 10/29/2021
Store 2 One Point Floors 2
Marketing Source Constant Contact
Sales Person 1 Davey Jones
Sales Person 2 Matt Stevens

Customer PO
Contract #
Entry Person Tim Noe
Market Sector Corporate TI

Entry CRM Activities Upgrades Bundle Alternates Profits Job Mail **Forms**

Docs

Type	Description	Attachment (Click to Add / View)	Added By / Date Time
Docusign	Signed Docusign PDF	Completed_Docusign_10-29-2021.pdf	Tim Noe 10/29/2021 5:17:23 PM

Forms

Form Name	Date	Created By	Notes	Status	Actions
				Resolved	New Del



Let's Do This

Set up steps

Pacific Solutions and DocuSign

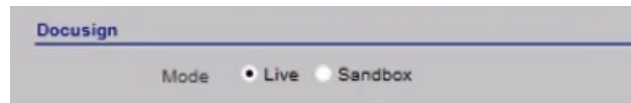


- Your Company must be current on PS Maintenance and JobRunner of FloorManager
- Have a current SSL certificate for external connectors such as DocuSign
- Request the DocuSign integration activation – there is a one-time set up fee of \$500 and a \$50/per month subscription
- Contact DocuSign
www.docuSign.com
- Create an account **it is strongly recommended that each individual using DocuSign have their own unique log in

System set up

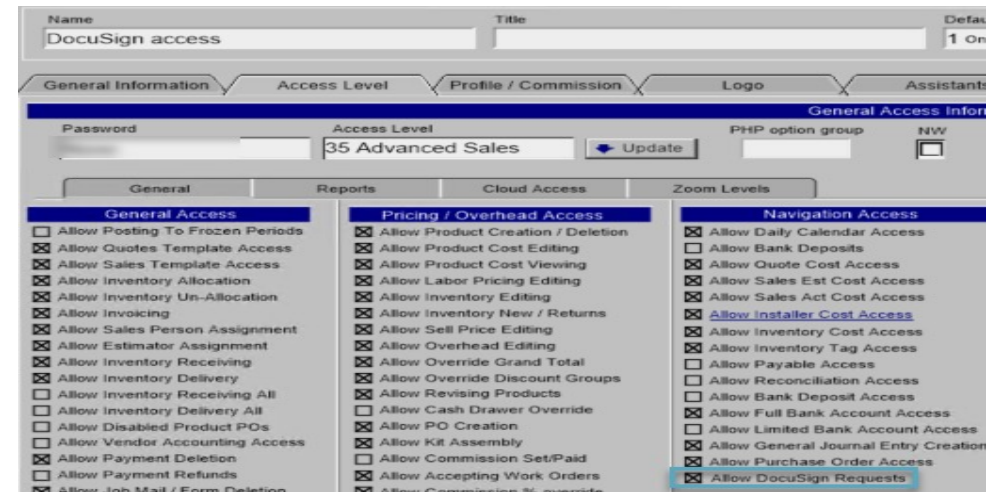
API Services

- Access the Admin > API Services
- Toggle the DocuSign indicator to “Live”



Personnel Access

- It will only work for the system personnel that you specify
- Access Admin> Personnel > Access Level tab for the desired personnel.



Help Center

www.pacific-solutions.com/help-center--client-zone.html