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.comClick 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)

Apps and Keys DocuSign X		- 0	×
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Value Calculator			
	Authentication Vot sure what settings to use? Learn more		
USERS AND GROUPS			
Users	User Application		
Permission Profiles			
Groups	Authorization Code Grant		
	O Implicit Grant		
SIGNING AND SENDING	Secret Keys		
Signing Settings	× 9194b5e5-cad6-41da-a869-e6fae0f540(
Sending Settings			
Email Preferences	ADD SECRET KET		
Custody Transfer	-9-7		
Document Retention	Service Integration		
Legal Disclosure	– RSA Keypairs (ID)		
Reminders and Expiration	+ ADD RSA KEYPAIR		
Comments			
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- 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

Settings / Setup & Configuration

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System Values		
Web Hooks		

- 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

	RSA Keypairs (ID)
	+ ADD RSA KEYPAIR
Additiona Redirect URI: × https://w × https://w	I settings
	+ ADD URI

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

- 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 ſ https://demo.docusian.net Apps and Integration Keys ADD APP Edit Start Go-Live rev App Name Integration Key Go Live Status Environment View API Dishboard < View Details c4cb7c14-f5f9-494d-822d-8eed5a622889 Submit for review App4Legal Development Delete Not started Make 20 suc Times Education e8389ab7-999c-4af1-8f1a-e8166c4f06d5 ACTIONS * Development ssful API calls Ŷ 0 0 2 Average Response Time over last 10 days Applications Successful Requests Failed Requests × . 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	Apps and Keys > API Dashboard	
A000011115. 10002102	API Dashboard	
Overview	Filter, sort, and view API usage for all active apps on this account.	
ACCOUNT	REQUESTS RESPONSE TIMES	
Plan and Billing		
Account Profile	View and filter API call request data.	DOWNLOAD LOGS
Security Settings		
Regional Settings	Q Integration Key is e8389ab7-999c-4af1-8f1a-e8166c4f06d5 × Add Filter	LAST 30 DAYS 🔻
Brands		
Updates		
Value Calculator	Request volume over the last 30 days	:
USERS AND GROUPS	Show Group By Display as	
Users	All Responses • Response Type (successful, failed requests) • Area graph •	
Permission Profiles	25 0 25	
Groups	Successful Calls Failed Calls Total Calls	
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Identity Verification	15 s	

- 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)

Reque	st App Review	×
Requirem	nents to pass review:	
\bigcirc	Complete 20 consecutive successful API calls in the past 30 days	
\bigcirc	Use OAuth 2.0 or App Password (for eSignature SOAP API only)	
\bigcirc	Comply With DocuSign API rules and limits.	
i Revie	ws may take up to 20 minutes.	
SUBN	AIT 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"

pps and Integration Keys			ADD AF	ADD APP AND INTEGRATION KEY	
App Name	Integration Key	Environment	Go Live Status		
pp4Legal	c4cb7c14-f5f9-494d-822d-8eed5a622889	Development	Submit for review	ACTIONS *	
imes Education	e8389ab7-999c-4af1-8f1a-e8166c4f06d5	Development	Review passed Promote to production	ACTIONS *	
				Edit	
2 25 0 Applications Successful Requests Failed Requests		Average Response Time over last 10 days		Select Go-Live account	
				Review Results	
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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. O Reviews may take up to 20 minutes. DOWNLOAD LOGS

- 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

SELECT PRODUCTION ACCOUNT

- · 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

CANCEL

 Add 2 URIs (your instance URLs then modules/contract/docusign_integration/call_back & your instance URLs then modules/customer-portal /docusign_integration/call_back)

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Save

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

Thank you!