

DocuSign Integration

Objectives

- Setup the integration between LEXZUR and DocuSign

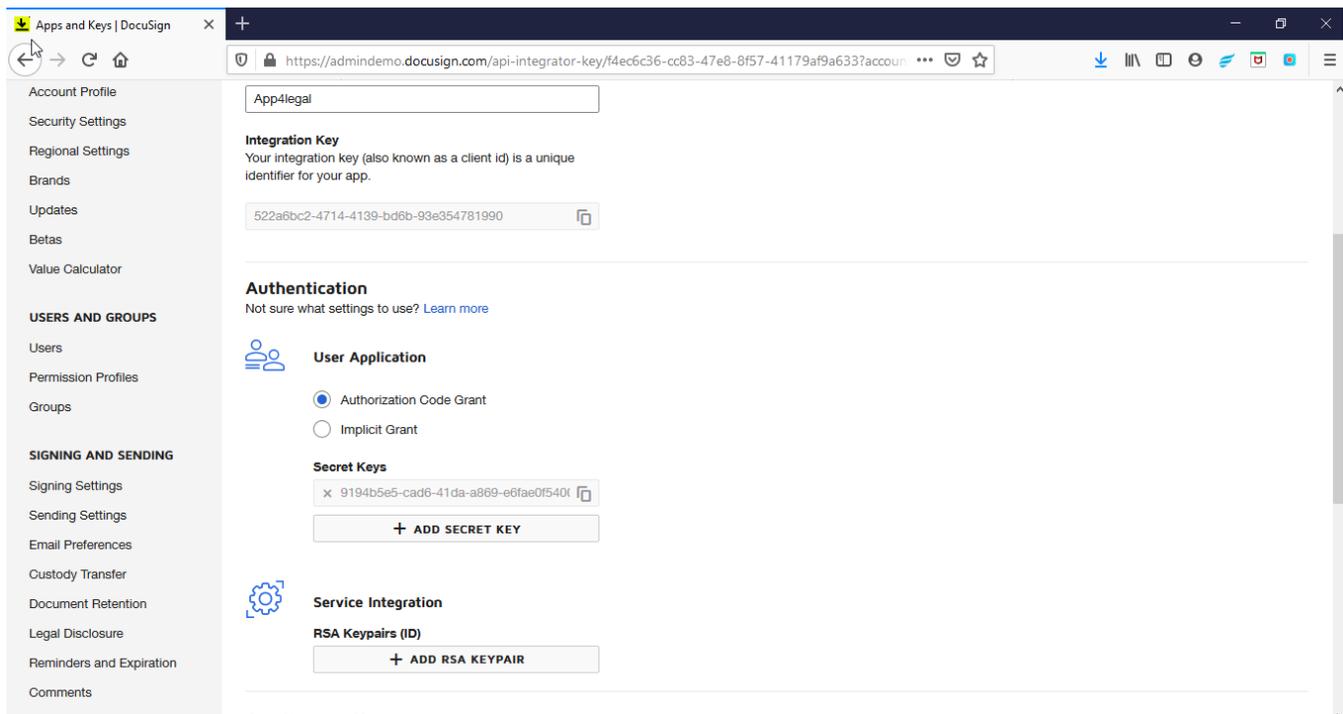
Steps

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	<input type="text" value="https://account-d.docuSign.com"/>	Save
DocuSign integration key	<input type="text" value="e8389ab7-999c-4af1-8f1a-e8166c4f06d5"/>	Save
DocuSign integration key's secret	<input type="text" value="2f793b51-064a-46b8-a91c-1f18f422db24"/>	Save
Email Template Message	<div style="border: 1px solid #ccc; padding: 5px;">Dear, Please sign the following document</div>	Save
Email Template Subject	<input type="text" value="Agreement for Signature"/>	Save

[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

x https://www.app4legal.com/test/app4legal-instances/5823/modules/contract/docuSign_integration/call_back

x https://www.app4legal.com/test/app4legal-instances/5823/modules/customer-portal/docuSign_integration/call_back

[+ ADD URI](#)

Link to Privacy Policy

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 ce17f062-ab3c-4240-9e50-2d54f80a5ce0	API Account ID 0159e7a0-8335-44d3-9e72-35bde8c79f7c	Account Base URI https://demo.docusign.net
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Apps and Integration Keys

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

2 Applications 0 Successful Requests 0 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](#)

i 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](#)

View and filter API call request data. [DOWNLOAD LOGS](#)

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

Request volume over the last 30 days

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

25 Successful Calls 0 Failed Calls 25 Total Calls

Success	Failed	Total
25	0	25

- 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](#).

i 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"

Apps and Integration Keys

ADD APP AND INTEGRATION KEY

App Name	Integration Key	Environment	Go Live Status	
App4Legal	c4cb7c14-f5f9-494d-822d-8eed5a622889	Development	● Submit for review	ACTIONS ▼
Times Education	e8389ab7-999c-4af1-8f1a-e8166c4f06d5	Development	● Review passed Promote to production	ACTIONS ▼

2 Applications **25** Successful Requests **0** Failed Requests

Average Response Time over last 10 days

- Edit
- Select Go-Live account
- Review Results** ←
- View API Dashboard
- View Details
- Delete

- 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.

DOWNLOAD LOGS

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!