

DocuSign Setup with Forms Logic

OVERVIEW

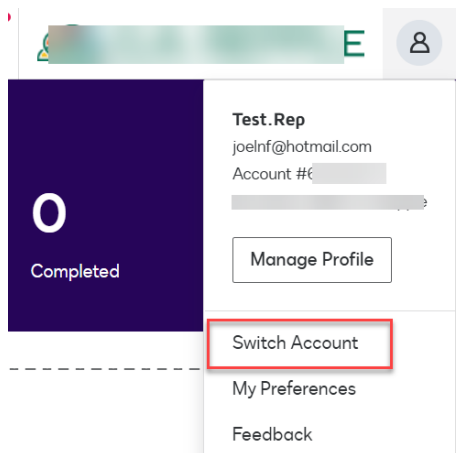
Before submitting your first DocuSign transaction through Forms Logic, two setup steps must be completed: setting Forms Logic as your default DocuSign account, and creating the digital handshake between the two systems.

PART 1 — SET FORMS LOGIC AS YOUR DEFAULT DOCUSIGN

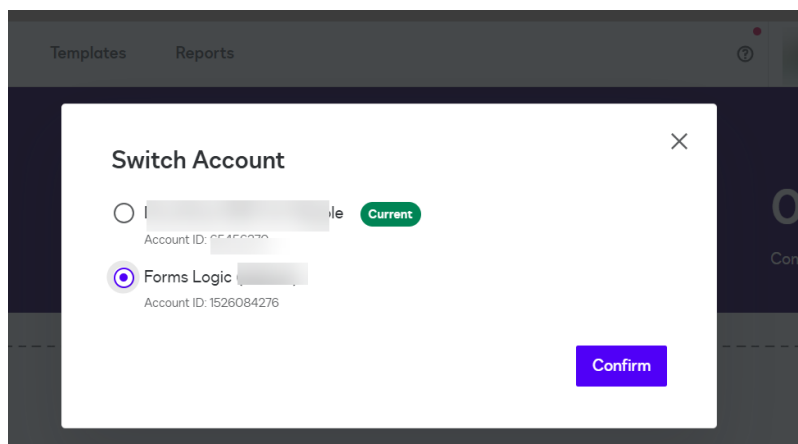
You will receive an account activation invitation to your Forms Logic DocuSign account.

Note: If your DocuSign account is used exclusively with Forms Logic, **you can skip this section.**

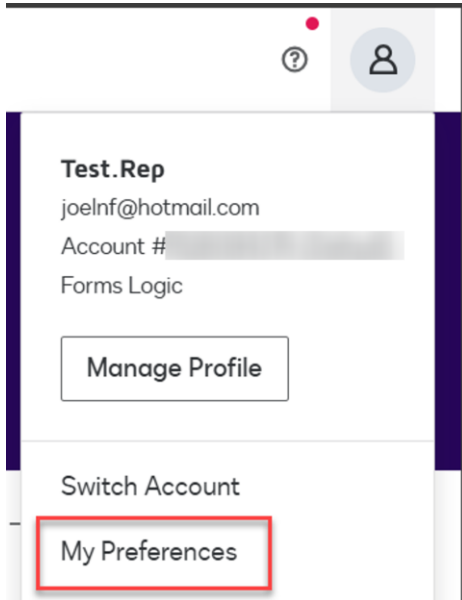
1. In DocuSign, Select your name or icon in the upper right corner and select **Switch Account**.



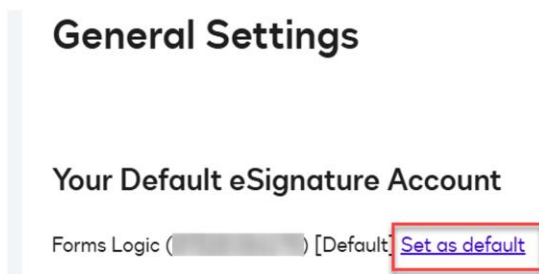
2. On the next screen, select **Forms Logic** and click **Confirm**.



3. Select your icon in the upper right corner again and select **My Preferences**.



4. Set Forms Logic as the default account and click **Confirm**.

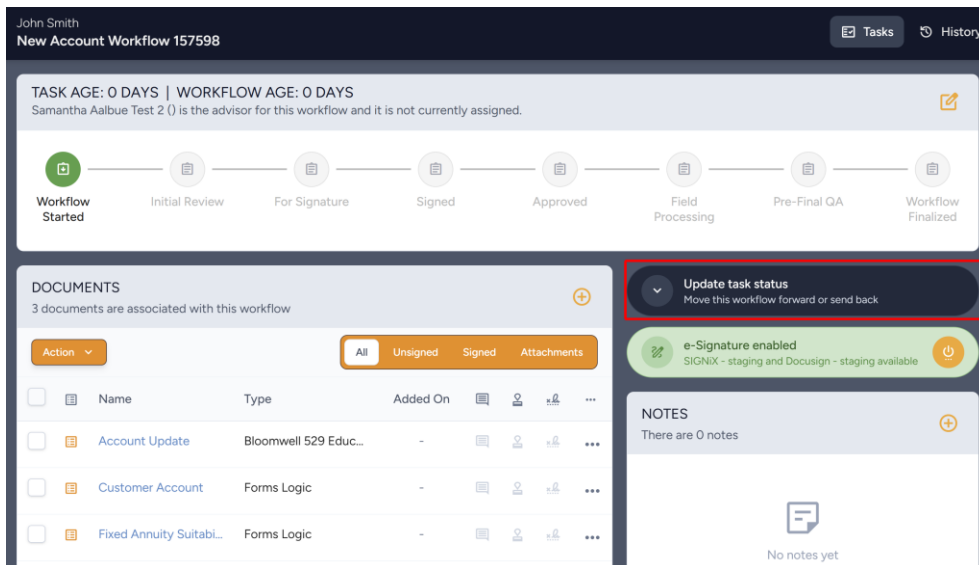


5. You are now set up to use Forms Logic with DocuSign.

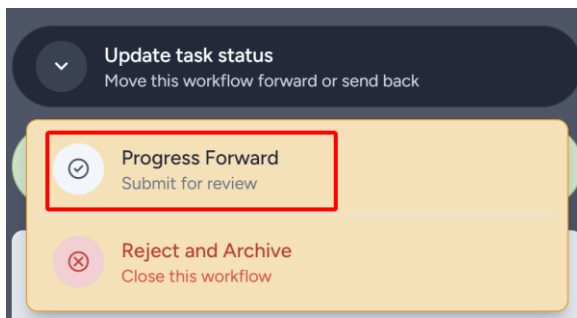
PART 2 — CREATE THE DIGITAL HANDSHAKE

The first time you use Forms Logic with DocuSign, you must complete a one-time authorization step — the 'digital handshake' — that allows all future e-sign transactions between the two systems to run automatically.

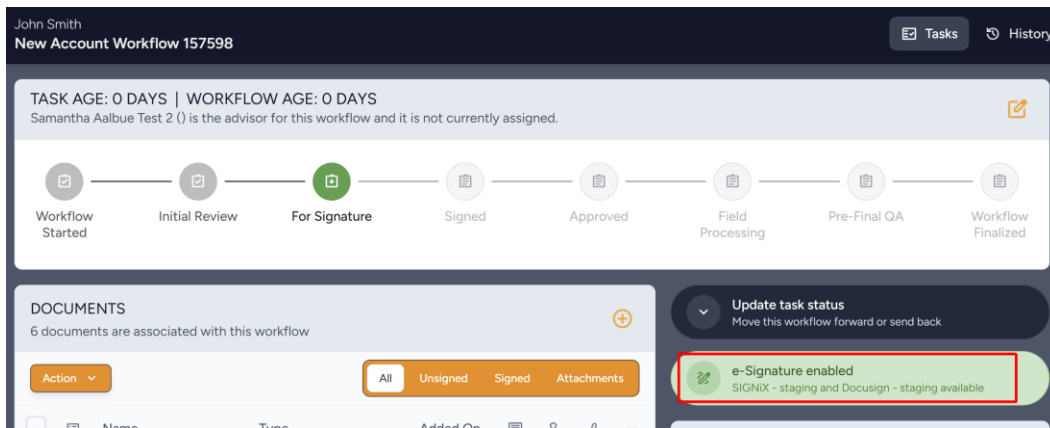
1. Locate a workflow that is set up to be sent via e-sign and open it.
2. Inside the Workflow, click the **Update Task Status** button.



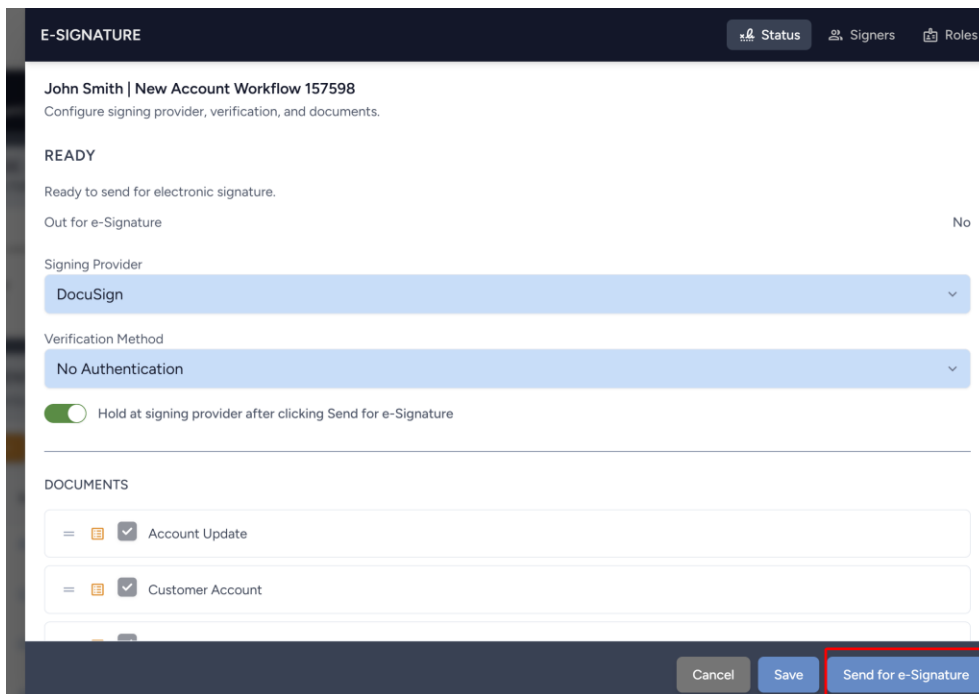
3. From the dropdown, select **Progress Forward**.



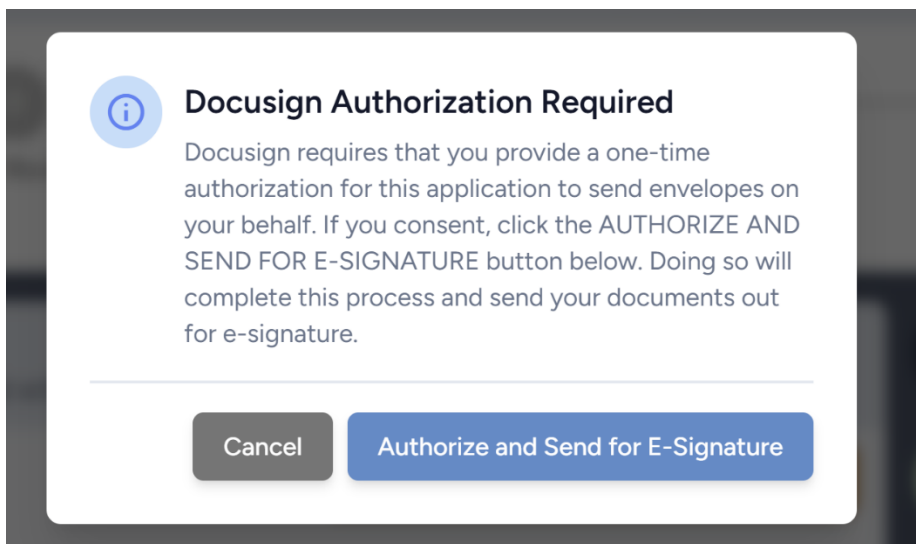
4. Go back into the Workflow and click on the **Signature Indicator**.



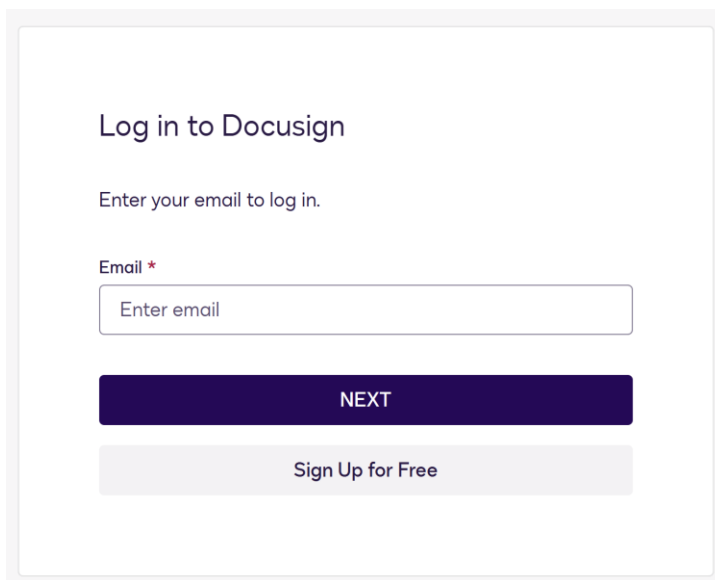
5. The E-signature drawer will open. In the bottom right, click **Send for E-Signature**.



6. The FIRST time sending for E-signature, you will see a popup about one-time consent. Click **Authorize and Send for E-Signature**.



7. You will be redirected to DocuSign and will need to login.

The image shows a Docusign login interface. At the top, it says "Log in to Docusign". Below that, it prompts the user to "Enter your email to log in." There is a text input field with the placeholder "Enter email". Below the input field are two buttons: a dark blue button labeled "NEXT" and a light gray button labeled "Sign Up for Free".

Log in to Docusign

Enter your email to log in.

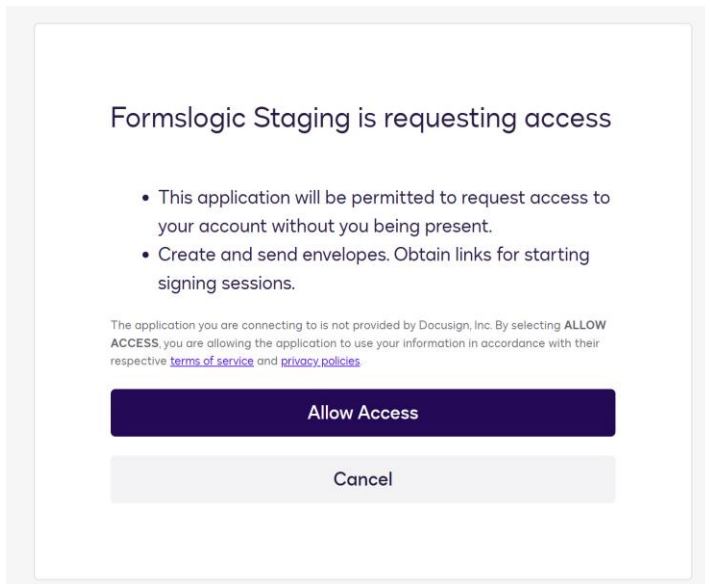
Email *

Enter email

NEXT

Sign Up for Free

8. Once you log in, you will be asked to Allow Access with Forms Logic. Click **Allow Access**.

The image shows a screen titled "Formslogic Staging is requesting access". It contains two bullet points: "This application will be permitted to request access to your account without you being present." and "Create and send envelopes. Obtain links for starting signing sessions." Below the bullet points is a disclaimer: "The application you are connecting to is not provided by Docusign, Inc. By selecting ALLOW ACCESS, you are allowing the application to use your information in accordance with their respective [terms of service](#) and [privacy policies](#)." At the bottom are two buttons: a dark blue button labeled "Allow Access" and a light gray button labeled "Cancel".

Formslogic Staging is requesting access

- This application will be permitted to request access to your account without you being present.
- Create and send envelopes. Obtain links for starting signing sessions.

The application you are connecting to is not provided by Docusign, Inc. By selecting **ALLOW ACCESS**, you are allowing the application to use your information in accordance with their respective [terms of service](#) and [privacy policies](#).

Allow Access

Cancel

9. This completes the integration and the Workflow will automatically be sent for E-signature.
10. On all future e-sign submissions you only need to click **Send for E-Signature** — no further authorization steps are required.