

Laserfiche Integration with DocuSign



DocuSign® is the global standard for eSignature and eSignature transaction management leader. DocuSign automates manual, paper-based processes with the only open, independent, standards-based platform for managing all aspects of documented business transactions, including identity management, authentication, eSignature, forms/data collection, collaboration, workflow automation, payments and storage.

DocuSign accelerates transactions to increase speed to results, reduce costs, and delight customers with the easiest, fastest, most secure global network for sending, signing, tracking, and storing documents in the cloud. DocuSign helps companies securely collect information and payments, automate workflows, and sign anything, anywhere, anytime, on any device to do business faster and better.

The Laserfiche Integration with DocuSign enables users to initiate a signing process from within Laserfiche Web Access. Users may select the type of signing process they are initiating and attach documents that need to be a part of that process. Also, once the signing process completes, documents are imported back into the Laserfiche Repository from DocuSign as new versions of the un-signed document. Information captured during the signing process may be mapped to Laserfiche metadata fields.

DocuSign securely accelerates transaction cycle times to increase speed to results, reduce costs, and improve customer satisfaction.

Document Signing Automation

- Streamline the process of sending out contracts for signature. Eliminate manually keeping track of which contracts are outstanding and haven't been signed, and end the possibility of contracts changed by the customer before signing.
- Quickly and easily transform any electronic document (or even scanned copy of a paper document) into a PDF with signatures.
- Ensure document integrity throughout the business process by automatically validating signatures with Laserfiche Workflow to confirm documents are not altered after signing.

Features

Send to DocuSign from Laserfiche Web Access

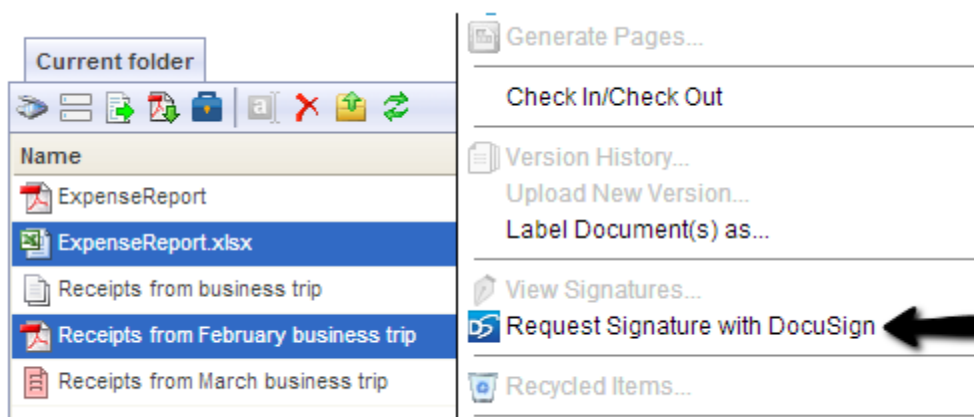
- Initiate a signing process with DocuSign easily from the Laserfiche Web Access interface – simply choose a document, choose the type of signing, who needs to sign it, and send.
- Make use of robust DocuSign features including
 - “Sign in-person”
 - Tablet signing or signature pad signing
 - User authentication constraint

Import to Laserfiche from DocuSign

- Round-trip integration: on import, documents can be saved as a new version of their originals in Laserfiche, eliminating duplication.
- Customize your metadata upon import: – make use of information about the DocuSign process, including capturing the names and e-mails of the individuals who have signed the document, timestamps, as well as comments for certain types of actions.
- Create consistent naming and filing conventions for importing signed documents: Support different routing and metadata capture, as well as automated folder creation and naming, depending on whether the document was signed successfully.
- Sign documents from Salesforce and import directly to Laserfiche for records retention.
- Automatic retry of import can be configured to ensure documents are correctly imported if the original document is briefly locked by another user. If a document is locked for many hours and the import fails completely, the import package is saved so an admin can recover the file later.
- Email error reporting notifies you immediately of any issues.

Support and Updates

- Your Laserfiche reseller will promptly troubleshoot and resolve any issues that arise.
- Laserfiche Rio customers have direct-to-Laserfiche Web chat for designated support personnel.
- New releases and product updates.
- 100% credit towards product upgrades.
- Access to the Knowledge Base articles, discussion forums and educational resources on the [Laserfiche Support Site](#).



Request Signature with DocuSign

Documents

ExpenseReport.xlsx

Receipts from February business trip

+ Add Document

DocuSign Template

Expense Report Request

Required

2 document(s)

Description

Please attach the expense report Excel document (first) and the document with your PhotoDocs-enhanced receipts second. Please select yourself as the first signer

Recipients

1

Employee (you)

Name (required)

Email (required)

2

Manager Approval

Name (required)

Email (required)

Email Subject & Message

Expense Report request

Please process this expense report.

Request Signature

Cancel

Help

Specifications

Requires Laserfiche Web Access 9.0.2 and Laserfiche Server 9.0.2 or later.

Pricing

\$500.00 Annually