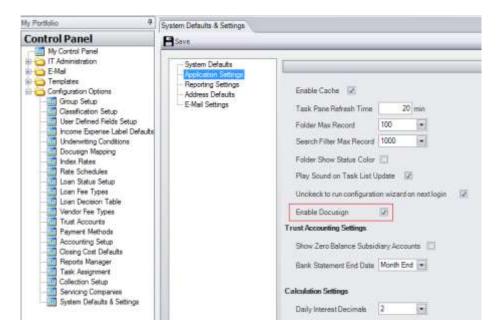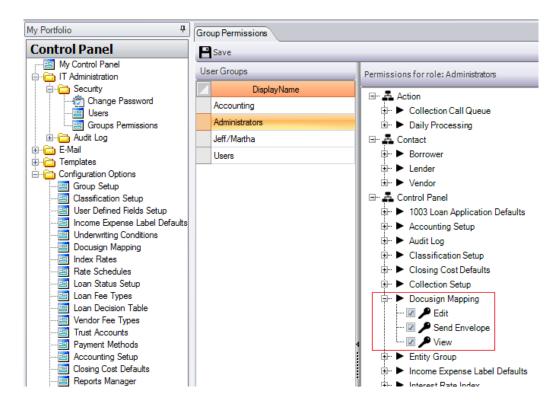# LOAN SERVICING SOFT DocuSign Integration

This document will guide you through the process of creating and posting DocuSign envelopes using LOAN SERVICING SOFT.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.

1) Sign up with DocuSign: https://www.DocuSign.com/signup/free selecting a trial account or one of the plans they offer. DocuSign will provide an account e-mail (the username) and a password. These credentials are used in both the DocuSign web user interface and LOAN SERVICING SOFT.

2) Using the DocuSign user interface, define envelope templates which will be mapped to LOAN SERVICING SOFT. These templates are used to create and post envelopes. DocuSign provides a user guide on this here: https://www.DocuSign.com/support/how-to-guides/creating-a-template

3) Enable DocuSign in LSS: Go to Control Panel -> Configuration Options -> System Defaults & Settings -> Application Settings and check the **Enable DocuSign** option.
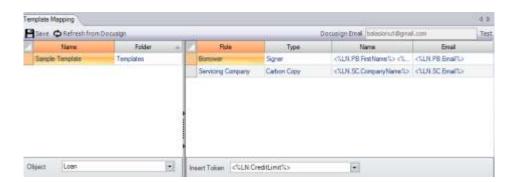
4) Assign proper user rights to users that will be using DocuSign:

- View right = user will be able to view template mapping screen.
- Edit right = user will be able to change template mapping screen.
- Send Envelope right = user can create and send DocuSign envelopes based on LOAN SERVICING SOFT reports.

5) Go to Control Panel -> Configuration Options -> Servicing Companies and select the company for which DocuSign will be enabled. Go to the E-Sign tab and enter the DocuSign Credentials.

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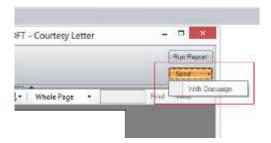6) Go to Control Panel -> Configuration Options -> DocuSign Mapping

The Template Mapping screen is used to import DocuSign defined envelope templates and map them to LOAN SERVICING SOFT entities (i.e. loan, borrower, lender, and vendor).

To begin, click the top right button labeled **Test**. This contacts the DocuSign server to validate the credentials entered in step 5.

If the validation returns successfully, click the **Refresh from DocuSign** button. This will import the templates defined in step 2 into LOAN SERVICING SOFT.
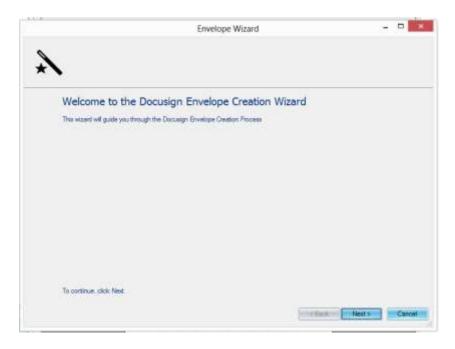
Once the DocuSign templates are imported, they will have to be configured:
- Select the template in the left pane.
- Select the entity (usually **Loan**) from the Object drop-down menu.
- In the right pane you can customize the template roles (these are also downloaded from DocuSign). Enter a Name and Email in the appropriate columns, or use LOAN SERVICING SOFT tokens to feed the Name and the Email fields on envelope creation.
- Click the **Save** button to save your changes.

7) To create an envelope based on a customized template, go to the Documents section and run any report to be used as the envelope's contents. After validating the content of the report, click **Send** -> **With DocuSign**.

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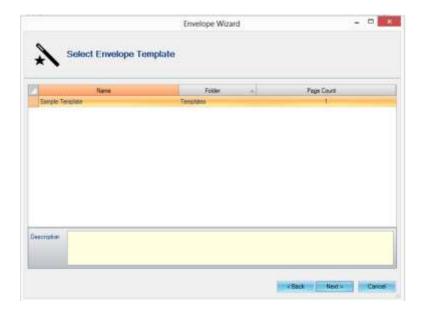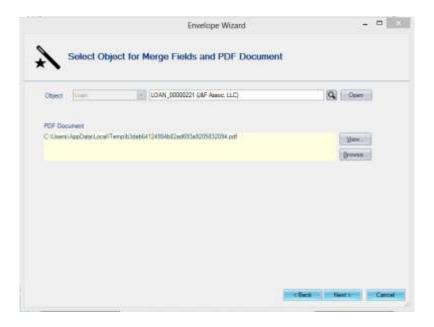8) The DocuSign Envelope Creation Wizard will pop up.

9) A list of available templates are displayed alongside the parent folder of the template and the number of pages the template has. Select the template you want to use for your envelope. Press Next.
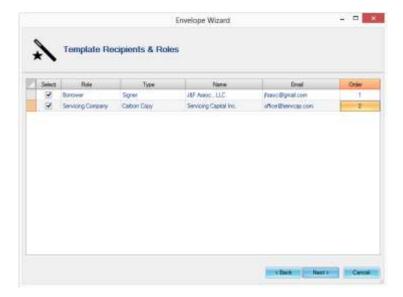

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10) Use the magnifying glass icon to select a LOAN SERVICING SOFT object (based on the object type selected for this template in the step 6 mapping screen). This object (usually a loan) will be used to feed the names and e-mail addresses to the envelope. From this page you also have the option to open the envelope's contents as a PDF document or browse to its location. Press Next.
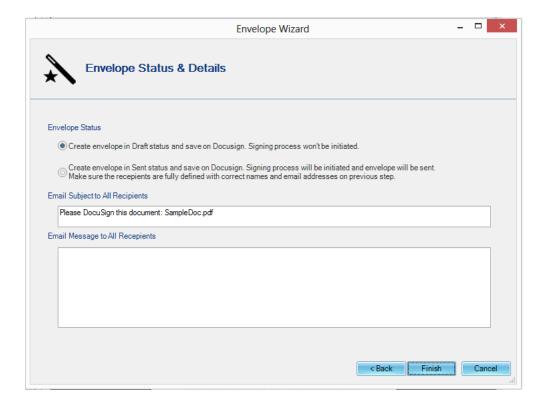

11) On this page, envelope roles can be reviewed and adjusted. The name and email fields should already be filled out. Press Next.

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12) On this final page, the envelope's status can be selected.
- If the Draft status is selected the envelope will be created and saved on the DocuSign web portal. In this case the delivery process will not start allowing the user to further adjust the envelope online (for example adding or removing roles from the envelope).
- If the Sent status is selected, the signing process will be initiated when the **Finish** button is clicked.

Fill out the envelope's e-mail subject and e-mail message body. Press Finish.

13) If the creation was successful a confirmation message will be visible on screen with the new envelope status and ID.

14) You can now login to the DocuSign web portal and continue editing the envelope if the Draft status was selected, or wait to receive the confirmation e-mail from DocuSign when the signing process is over. The envelope can then be printed or archived.

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