

Connecting and Disconnecting from DocuSign

SUMMARY

Paperless Pipeline integrates with DocuSign. This means you can exchange documents between the two systems directly from Pipeline. .

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Connecting to DocuSign

- 1 **Identify your DocuSign account number.** Have your DocuSign account number and email address handy.
- 2 **Click your user icon on the top right corner of your DocuSign home page.** Your account information including your DocuSign account number will pop up automatically.
- 3 **Click your name in the upper right corner then "Personal Profile".**
- 4 **From the Integrations menu on the left, click *Connect to DocuSign*.**
- 5 **Enter your DocuSign account log in information.** This includes your DocuSign account number, email address, and password.
- 6 **Click [Connect to DocuSign].**

The screenshot shows a sidebar on the left with navigation options: Personal Profile, Email Templates, Your Commissions, Integrations (with sub-options for Connect Zapier and Connect DocuSign), Your Info (showing Rachel McWhirter, rachel@paperlesspipeline.com, Agent), and Your Permissions (showing company-wide master admin privileges). The main content area is titled 'Connect Your DocuSign Account' and contains a form with the following fields: DocuSign Account ID (with a search icon), a link to find the account ID, DocuSign Login Email (pre-filled with rachel@paperlesspipeline.com), and DocuSign Password (masked with dots). At the bottom of the form are 'Connect to DocuSign' and 'Cancel' buttons.

Disconnecting or Changing a Connected DocuSign Account

To change or disconnect a DocuSign account:

- 1 Click your name in the upper right corner then "Personal Profile".
- 2 From the Integrations menu on the left, click *Disconnect DocuSign*.
- 3 Check [Disconnect your DocuSign account from Paperless Pipeline].
- 4 Click [Disconnect from DocuSign].

The screenshot shows the 'Disconnect Your DocuSign Account' form. The sidebar on the left is similar to the previous screenshot, but the 'Integrations' menu now highlights 'Disconnect DocuSign'. The main content area is titled 'Disconnect Your DocuSign Account' and features a checkbox labeled 'Disconnect your DocuSign account from Paperless Pipeline'. Below the checkbox are 'Disconnect from DocuSign' and 'Cancel' buttons.

Once the account has been disconnected, you will no longer see DocuSign-related options throughout Pipeline.