

Sending contracts to DocuSign

In order to use DocuSign and be able to sign a Charter Agreement using DocuSign, you need to integrate first.

The integration process is explained [here](#).

Once the integration is active, each user will have to connect Leon account with one's own account in DocuSign and then, will be able to use it.

Connecting Leon account to DocuSign



Connecting to DocuSign

The connection between the user Leon account and the DocuSign account takes place when the first Contract after activating integration is sent.

In order to **connect** own account in Leon to DocuSign account, you need to:

1. Click on the 'CONTRACT' option in the quote edit section
2. In the 'Send document' pop-up window switch the tab to **DOCUSIGN**
3. Click on the blue 'CONNECT DOCUSIGN' button
4. In the pop-up window, log in to your DocuSign account

Once you signed in, you should see the following message:

SUCCESS. Your Leon account has been connected to DocuSign. Please wait for connection in Leon view.

This is when you can start using the integration.

Usage



Preview and update option

DocuSign integration works only with the 'Charter Agreement' document and allows reviewing and signing the document in a fast and secure way.

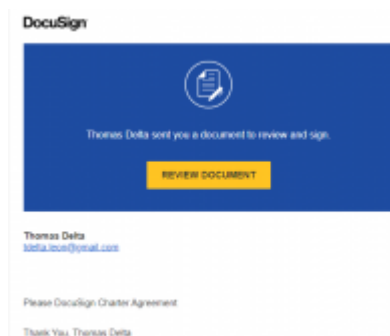
After connecting to DocuSign, each new 'Charter Agreement' will require **creating a draft in DocuSign**.

Once the draft is created, you will be able to **send** the document to DocuSign.

In the 'Send document' window you will be able to **select the 'Charter Agreement' version** (based on the number of versions created in the Documents Manager). Additionally, you can select the **Email template**. This is the 'Charter Contract' email template.

'**To**' email is the default email of the Requester or Representative. The 'To' email can also be inserted manually. '**CC**' email is the email to which the confirmations will be sent, e.g. confirmation of the contract signed by the Client. 'CC' email can be inserted by default in the 'Charter Contract' email template.

Before sending the 'Charter Agreement' to the Client, you can also select one of the available options:



Link to DocuSign in mailbox

- **SHOW DRAFT IN DOCUSIGN** - which will allow you to preview it in DocuSign
- **UPDATE DRAFT IN DOCUSIGN** - which will allow you to update the document if there are any changes within the request

Once the '**Charter Agreement**' is sent, the Client will receive it to his mailbox titled 'Agreement from [Airline name]'.

The email will also contain the link to DocuSign which will allow **reviewing the document** for the Client.

Also, the selections in the "Send document" window will change to **SHOW DOCUMENT IN DOCUSIGN** and **UPDATE DOCUMENT IN DOCUSIGN**

Adopting Client's signature

Preview of signed document in DocuSign

The client will be able to sign, date and stamp the document without having to print it.

It is possible to include the **signature tabs** in the document so to indicate, where the document should be signed.

The tab icon can be included in HTML in the Documents Manager - 'Charter Agreement' by using the below:

- {% _SellerSignature_ %} - to indicate where the seller should sign
- {% _BuyerSignature_ %} - to indicate where the buyer should sign

For example, inserting below code HTML

```
<td class="signature">{% _BuyerSignature_ %}</td>
```

will insert the following tab in 'Charter Agreement' in DocuSign:



The client can click on the 'Sign' tab and insert the signature.

Once the Client reviewed it and signed it, the Client can press finish which will send a notification to an email that the agreement has been signed and in DocuSign, it will be marked as 'Completed'.

Agreement from Leon ⓘ

Envelope ID

Last change on 11/20/2020 | 12:33:08 pm

Sent on 11/20/2020 | 12:22:59 pm

✓ Completed

MOVE

MORE ▾

Recipients

✓ Delta

Signed

on 11/20/2020 | 12:33:08 pm

Signed in location

SIGNING ORDER

Charter Agreement

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<https://wiki.leonsoftware.com/> - **Leonsoftware Wiki**

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<https://wiki.leonsoftware.com/leon/docusign-integration?rev=1621579448>

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