DocuSign

DocuSign and HubSpot integration

The benefits of an integrated experience - HubSpot and DocuSign Powered by Integration Glue

How does the DocuSign and HubSpot integration work?

1. Create a HubSpot workflow to trigger the sending of documents to DocuSign for signing using a custom DocuSign workflow action. Specify the original file within the HubSpot file system - this can be set from a property on a record. Specify who the document needs to be signed by - this can be set from properties on a record.

2. This will trigger DocuSign to send standard DocuSign emails to the specified recipients.

3. You can specify different groups or orders for recipients to sign the documents.

4. Failures and successes are pushed back to HubSpot and captured against the original record.

5. Once fully signed, the Integration gets the signed PDF from DocuSign, uploads it to HubSpot and associates it with the original record.

Key benefits of this integration

Improved sales and marketing workflows

Real-time notifications and document status updates keep your sales teams well-informed throughout the signing process, because they know what documents are being looked at and when. Marketing teams can also incorporate record signing into their campaigns, delivering a more unified customer experience.

Enhanced data accuracy and security

Centralised storage of signed documents and associated data makes it simple for your team to access what they need when they need it. Secure cloud storage of signed copies mitigates the risk of data loss. This integration ensures adherence to legal and regulatory requirements, offering peace of mind regarding data protection and privacy.

It also solves problems that we know users have with the current native integration, including:

– Associating documents with relevant records in HubSpot - with the new integration documents can be associated with specific company or contact records

– Access to custom fields - Integration Glue used in combination with the DocuSign integration allows the user to use any field in the object

– Tracking of the signature flow - we can map all DocuSign webhooks to HubSpot properties to enable workflows to be triggered

Use Cases

The DocuSign and HubSpot integration empowers users in a range of different ways:

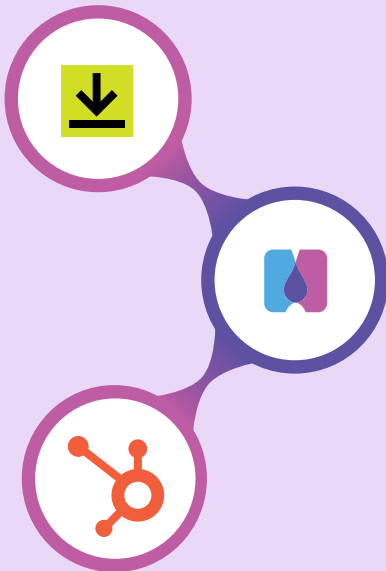### Streamlined contract and proposal submissions

Submit contracts and proposals for electronic signatures directly from HubSpot, elevating the customer experience.

Insightful document tracking

Keep tabs on document status and engagement metrics, empowering sales teams to identify bottlenecks and take immediate actions.

Marketing campaign integration

Capture leads from various marketing channels and automatically send follow-up documents for electronic signatures. Nurture leads with personalised document workflows based on their engagement and preferences.

DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

HubSpot

HubSpot is a customer platform with all the software, integrations, and resources you need to connect your marketing, sales, content management, and customer service. HubSpot's connected platform enables you to grow your business faster by focusing on what matters most: your customers. HubSpot's customer platform is made up of six core products for marketing, sales, customer service, content management, operations, and commerce. Each product in the platform is connected to the same underlying CRM database, giving you incredible insight into every contact at each stage in their customer journey.

INTEGRATION GLUE

Integration Glue helps businesses enhance their HubSpot experience with bespoke solutions in integrations and micro applications. Integration Glue enables businesses to consolidate all of their integrations onto one platform, to achieve significant reductions in initial and ongoing integration maintenance, and security costs - allowing business to work on what matters.