# CASE STUDY

## DocuSign Integration with Salesforce for Fintech company

## CUSTOMER

A financial company is a lender that lends in residential real estate investors. They have experienced continued growth, expanding from operations in the Chicago area to the entire United States

## CHALLENGE

The Customer faced significant challenges in processing and managing onboarding and closing services from Salesforce-based online forms across multiple states in USA. The manual process of collecting signatures caused delays, introduced errors, and created compliance risks. These inefficiencies not only slowed down client onboarding and closing but also made real-time tracking difficult.

To address these issues, Aspire Software Consultancy was tasked with integrating Nintex and Docusign software into the Customer's online forms, generated document dynamically and automated the signing process, and improved the overall efficiency.

# SOLUTION
## Key milestones that the Aspire team performed:

### Initial Setup
We downloaded and configured the "Docusign eSignature for Salesforce" managed package. And setup the connection with Nintex. This involved setting up the connection between Docusign and Salesforce, DocuSign and Nintex, defining the integration parameters, and ensuring the system was correctly configured to meet the customer's specific requirements.

### User Creation and Permission Management
The Aspire team set up user accounts and assigned permissions tailored to their roles and responsibilities. This approach guaranteed that users had access exclusively to the documents and features necessary for their work, safeguarding security and compliance. Additionally, we aligned the users' permissions with DocuSign, ensuring uniformity across both systems.

### Generated Document Template
Implemented custom templates using the Nintex and setup DocuSing Signer and the flow of the signing order and the configure the storage setting after document completed.

### Dynamic Data Insertion
We created Nintex/DocuSign templates to automatically pull client-specific details like names, addresses, and account information from Salesforce. This automatic data insertion removed the need for manual input, minimized errors, and ensured each document was accurate and personalized.

### Data Storage
In a custom object in Salesforce, we set up storing and tracking all relevant info, such as the document status, delivery time, signing time, and the signer identity. Also, data update based on the document status to the related Account, Opportunity and other custom object.

### Docusign Integration into the Form
The development team embedded Docusign into the customer's online Application forms, automating the document process. When a client reaches a certain step in the onboarding process and agrees to the terms and conditions, a Docusign envelope is automatically sent to the client's email. This allows clients to sign agreements electronically, making the process fast, secure, and easy.

# RESULTS

With Aspire's help, the Customer successfully streamlined their sales process by integrating Docusign with the onboarding and closing processes and synchronizing it with Salesforce. The time required to onboard new clients was reduced, allowing clients to sign agreements and activate services within minutes.

The technical implementation, including the setup of document templates, dynamic data insertion, user management, and automated synchronization, not only improved operational efficiency and data accuracy but also ensured compliance with financial regulations across multiple regions.

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