

A Self-Service Customer Onboarding Portal for a Pharmaceutical Distribution Leader

Replacing a paper-and-email onboarding process with a guided Experience Cloud portal powered by dynamic forms and DocuSign.

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One-liner: We replaced a slow, paper-and-email customer onboarding process with a guided Experience Cloud portal — embedding dynamic forms, automated document generation, and native DocuSign e-signature so new customers could be onboarded faster, with full status visibility and audit-ready compliance.

Engagement Snapshot

Client	HealthBridge Pharmaceutical Distribution Corp. (United States)
Industry	Pharmaceutical Distribution / Healthcare Supply Chain
Region	United States, delivered from India
Salesforce Cloud	Experience Cloud (+ Sales Cloud platform, DocuSign)
My Role	Salesforce Developer / Technical Lead (delivery)
Team Size	Cross-functional onboarding squad (developer, BA, manager, DocuSign SME)
Duration	Multi-phase program
Key Tools	Experience Cloud, LWC, Apex, DocuSign (Envelope Templates / dfsle), Excel-driven form catalogue

1. Project Context

HealthBridge Pharmaceutical Distribution Corp. is a major US healthcare supply-chain business whose growth depends on onboarding pharmacies, provider groups, and channel partners quickly and compliantly. Each new account onboarding required structured data capture, legal agreements, credentialing forms, and a documented signature trail.

The legacy process was heavily manual. Forms were assembled, emailed, printed, signed, scanned, and re-entered into internal systems. The process was slow, error-prone, difficult to track, and created compliance risk when documents were incomplete or inconsistently retained.

The client launched a transformation program to replace the process with a self-service Experience Cloud portal. I played a central role in the delivery, especially around the DocuSign integration architecture and the dynamic onboarding form experience.

2. Problem Statement

Our discovery phase surfaced a set of recurring issues that made onboarding slow, expensive, and difficult to audit:

- **Manual, paper-based onboarding.** The print-sign-scan-email loop created long cycle times and a poor first impression for new customers.
- **Large and varied form catalogue.** Dozens of forms had different signing requirements, from standard e-sign to special handling to no-signature paths, making consistency difficult.
- **Re-keying and document assembly.** Data entered in one place was typed again elsewhere, creating avoidable errors and rework.
- **No customer-facing status visibility.** Customers and internal teams could not clearly see where an application stood or what was still pending.
- **Compliance and auditability risk.** Signature capture, form handling, and document retention needed to be reliable, traceable, and reviewable.
- **Integration complexity.** Embedding e-signature properly into a Salesforce-hosted portal required evaluating and selecting the right DocuSign integration approach.

3. What We Built — The Solution

We delivered a guided, self-service onboarding solution on Experience Cloud that combined secure data capture, document automation, and embedded e-signature:

- **Branded Experience Cloud portal** — created a secure, customer-friendly onboarding site aligned to the client's brand and onboarding workflow.
- **Dynamic LWC forms** — captured onboarding information once and reused it downstream, eliminating manual re-keying.
- **Form categorisation engine** — analysed the full onboarding form catalogue and routed forms into standard e-sign, special-handling, and no-e-sign processing tracks.
- **Runtime document generation** — used DocuSign Envelope Templates and text-tab prefilling to generate signature-ready documents directly from Salesforce form data.
- **Native e-signature orchestration** — embedded DocuSign envelope creation, sending, and tracking into the onboarding journey for a smooth customer experience.
- **Status visibility and audit trail** — surfaced onboarding progress clearly to customers and internal teams while maintaining traceable document history.

4. My Role on the Engagement

I contributed as both a hands-on developer and delivery technical lead, with particular ownership of the DocuSign integration approach. My responsibilities included:

- **DocuSign integration ownership** — evaluating and evolving the integration design until we landed on the most maintainable and reliable pattern using Envelope Templates and runtime tab prefilling.
- **Technical design and development** — building LWC forms, Apex orchestration services, and the document/signature workflow inside Salesforce.
- **Form catalogue analysis** — producing the categorisation model that determined how each onboarding form should be generated and signed.
- **Documentation** — authoring technical design documents, requirement workbooks, and rollout material for stakeholders and support teams.
- **Cross-team collaboration** — working closely with the BA, delivery manager, and DocuSign SME to keep business rules, compliance needs, and technical design aligned.

5. How We Achieved It — Delivery Approach

1. **Requirement and form analysis.** Catalogued the full onboarding form inventory and classified each form by signature requirement, producing the logic matrix used in the final solution.
2. **Integration architecture selection.** Evaluated multiple DocuSign patterns and iterated toward the Envelope Template plus text-tab prefill model, which best balanced reliability, maintainability, and native user experience.
3. **Portal and form build.** Built the Experience Cloud site and dynamic Lightning Web Components to capture onboarding data into the Salesforce data model.
4. **Document orchestration.** Implemented runtime population of DocuSign envelopes using Salesforce data, removing the prior dependence on separately generated PDFs.
5. **Signature and status flow.** Connected envelope sending, callback handling, and status updates so signing progress was accurately reflected in Salesforce.
6. **Documentation and enablement.** Produced design documentation and handover material so the client team could operate and enhance the solution after rollout.

6. Outcomes and Business Impact

The onboarding experience moved from a slow paper-based process to a digitally guided portal with embedded compliance and visibility. Indicative outcomes included:

~50%	100%	Reduced	Real-time
Faster onboarding cycle time	E-sign document flow tracked in Salesforce	Manual re-keying and document assembly	Status visibility for customers and teams

- Onboarding shifted from manual paper/email to a guided self-service portal.
- Re-keying and manual document assembly were removed through dynamic forms and runtime prefill.
- Complex form handling became consistent through the categorisation engine.
- Reliable, auditable e-signature capture was embedded directly into the onboarding journey.
- Customers and internal teams gained real-time visibility into application progress.

Note: figures shown are representative portfolio outcomes and can be tailored to the client's measured onboarding KPIs before publication.

7. Tech Stack

Experience Cloud	LWC	Apex
DocuSign Envelope Templates	dfsle	Salesforce Data Model
SLDS	Excel Form Catalogue	Sales Cloud Platform

8. Architecture & Process Diagrams

The diagrams below illustrate the core process flows and architecture decisions behind the solution.

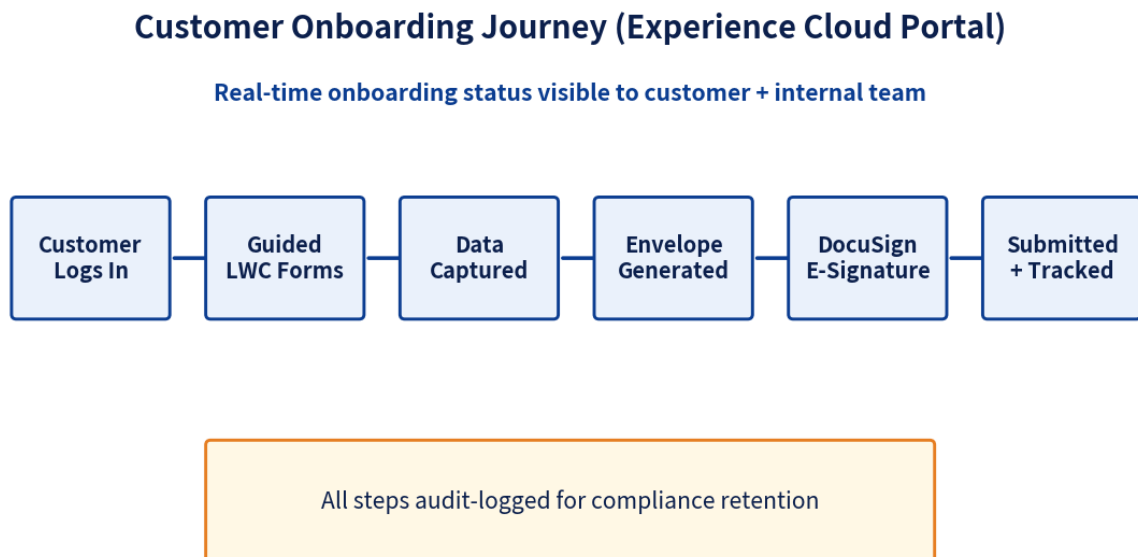


Figure 1 — Customer onboarding journey through the Experience Cloud portal.

DocuSign Integration Architecture

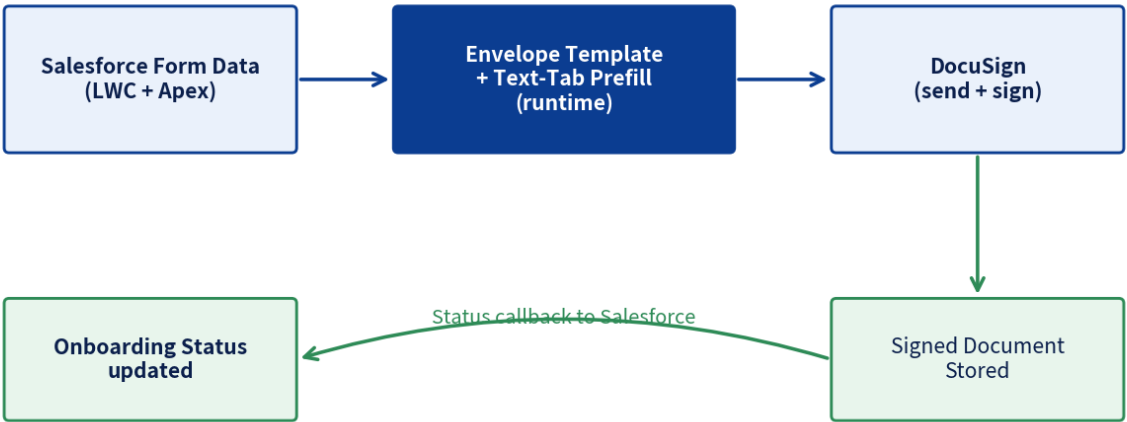


Figure 2 — DocuSign integration architecture using Envelope Templates and runtime text-tab prefill.

Form Catalogue Categorisation

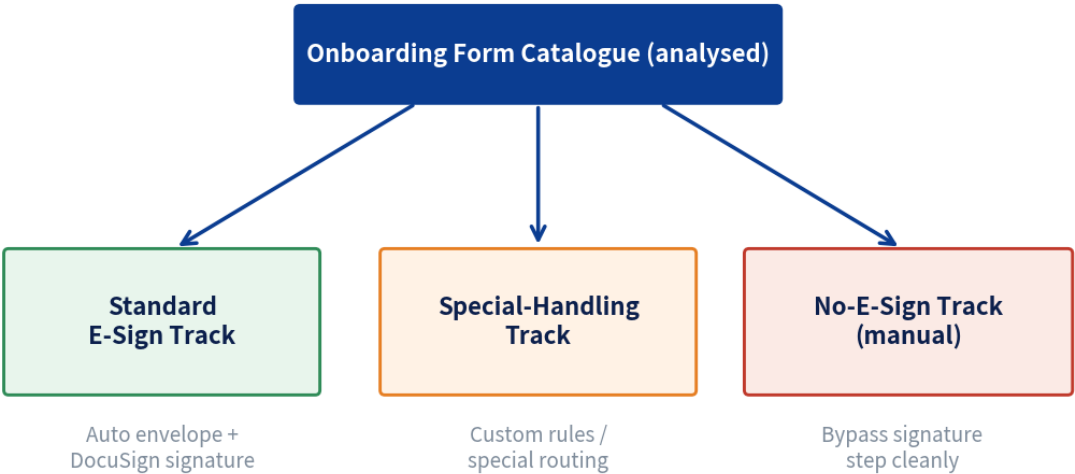


Figure 3 — Form catalogue categorisation matrix driving how each onboarding form is processed.

9. Key Takeaways

- **Portal UX matters as much as automation.** The success of the solution depended on making a complex compliance-heavy process feel guided and simple to the customer.
 - **Correct categorisation unlocks scale.** Analysing the form catalogue first allowed the platform to process very different document types consistently.
 - **Integration design is a business decision.** Choosing the right DocuSign pattern affected not just technical elegance, but maintainability, compliance, and rollout speed.
 - **Status visibility reduces friction.** A clear view of where onboarding stands removes avoidable follow-up emails and improves trust on both sides.
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About the Author

Parag Bhatt is a Salesforce Technical Lead and Senior Developer with 8.5 years of experience delivering CRM transformation programmes across Sales Cloud, Service Cloud, Experience Cloud, CPQ, Revenue Cloud, and Marketing Cloud. He has led offshore and hybrid delivery teams for clients across the GCC, North America, and APAC, with strong hands-on expertise in Apex architecture, automation design, integrations, e-signature, quote-to-cash, and customer engagement platforms.