

DocuSign® eSignature Connector

Sign. Send. Success.

DocStar offers an embedded electronic signature capability developed using the DocuSign eSignature API. You can access DocuSign from within DocStar workflow tasks and ad hoc actions for all DocStar document content, forms, and packages. Complete approvals and agreements in minutes—not days—from virtually anywhere in the world. Quickly and securely access and sign documents. Easily upload and send documents for others to sign. Send reminders and check signing status any time.

The combination of DocStar plus DocuSign eSignature constitutes a complete contract management system and facilitates end-to-end business workflows where content validation with eSignature is required for documents, forms, and packages. In DocStar, DocuSign maintains a complete, automated history of every viewing, printing, sending, signing, or declining activity on a document. Once a document is signed, the certificate of completion is attached in DocStar as proof of the signing process to all parties of the transaction. With DocuSign, you can be confident that your technology satisfies current regulations and statutes, such as the Uniform Electronic Transactions Act (UETA), the U.S. Federal E-SIGN Act, and E.U. Directive 1999/93/EC, among others.

How It Works

Send

Easily select and send DocStar documents for electronic signature.

Step 1: Select your document in DocStar

Simply upload a Microsoft Word, PDF, or other common document format from DocStar.

Step 2: Indicate who needs to sign

Add the names and email addresses of your signers and other recipients, and even specify the order in which they should sign.



Benefits

Sign documents from anywhere on any device

Email documents for instant signature and return

Help ensure documents are secure with encryption and complete audit trail

Step 3: Place fields and send

In DocStar, drag and drop DocuSign fields to indicate where you need a signature, initial, or date. You can also add standard or custom fields for signers to fill in. Then, click Send. DocuSign emails a link to each recipient which they can then use to access the document. Once the document is complete, it's stored securely for easy retrieval.

Sign

Quickly access and sign documents that require your signature.

Step 1: Click the link in the email

With one click, you can access the document and start the document signing process on virtually any Internet-enabled device.

Step 2: Follow the DocuSign tabs

Tabs and simple instructions guide you through the signing process. Your electronic signatures are secure, legally binding, and widely accepted for business transactions around the world.

Step 3: Finish

Once you're finished signing, click Finish to complete the process.

Manage

Readily check a document's status, send reminders, view audit trails, and securely store online.

Step 1: View your document's status

Just pull up your DocuSign dashboard to check status and schedule, run reports, and view audit trails. You can always see where your document is in the signing process and even set automatic reminders and receive notifications at every step of the process.

Step 2: Save automatically and securely

Once completed, both senders and signers have anytime, anywhere access to the document. It is stored online and can be downloaded and printed as needed.

Step 3: Administer with ease

You can manage internal users, adjust branding, and get visibility into documents across your organization. Advanced options help you adhere to and set compliance policies, as well as access advanced reporting.

Typical Use Cases**Contact Management**

Use when your contract requires signature and countersignature. Electronic signature capabilities have revolutionized how business gets done.

Human Resources

Use when a new employee application form requires a signature on some or all documents within the package, or when you require a signature on the package to approve/validate the whole package.

Engineering

Use when drawing changes require a review cycle and sign-off by stakeholders, including customers.

Production testing and quality management

Use when production plans and production test results require signoff by quality personnel.

Field service

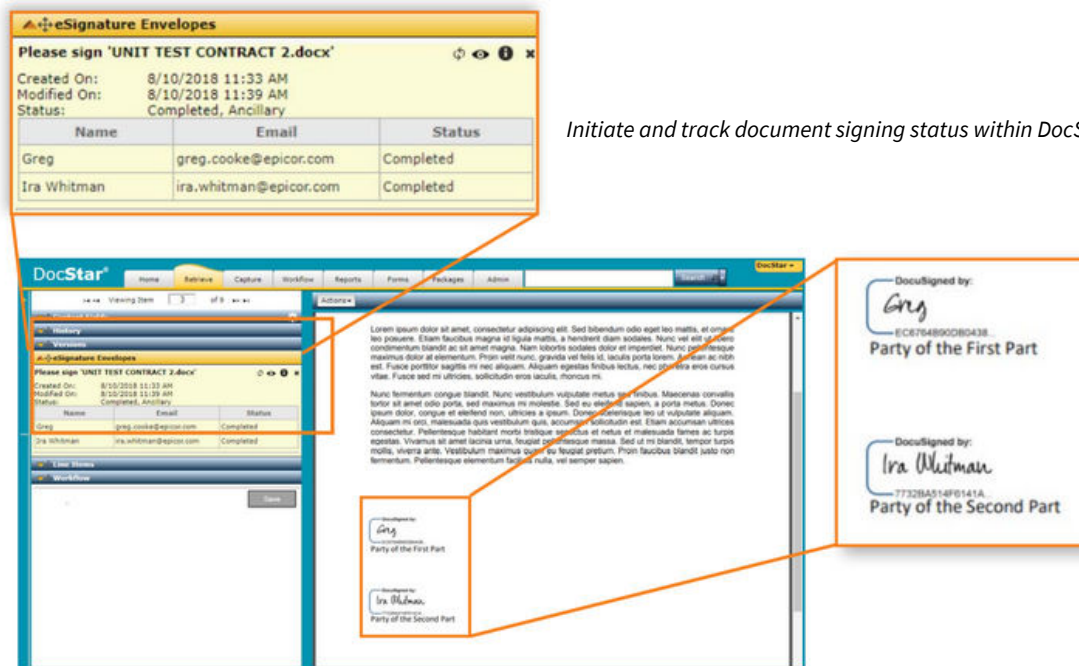
Use electronic signatures to sign off on work orders or acknowledge goods received at an offsite location. Also use when received orders require sign-off by quality personnel.

Key Features

- DocuSign eSignature is accessible and racked within DocStar.
- DocuSign eSignature is a web-based service
- Supported document types for eSignature include Microsoft® Word, PDF, HTML, and other common formats
- DocStar envelopes track the signing status of one or more related documents
- Recipient types include signer, cc/ carbon copy, must read, editor, and more
- Signature blocks, initial blocks, and metadata blocks such as PO numbers can be placed anywhere on the document

Requirements

DocuSign eSignature capability in DocStar requires the purchase of a license or subscription for DocStar DocuSign Connector. DocStar Version 18.2 or higher is also required. You will be required to set up an account at www.docusign.com/products/electronicsignature. While DocuSign is always free to users signing documents, DocuSign charges users for premium features like requesting signatures from others, custom branding, signer authentication, and more.



Initiate and track document signing status within DocStar

EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

Contact Us Today: info@epicor.com | www.epicor.com

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