Docusign Integration Guide

For administrators setting up the ZoomInfo Sales integration with Docusign

A Zoominfo Sales admin can connect the Docusign integration using their Docusign admin credentials.

- Using this connection, ZoomInfo will ingest Docusign activity - when content is shared, delivered, signed and declined - on a nightly basis.
- Your organization's users can use Docusign Buyer Intent filters along with ZoomInfo data to find decision makers at accounts that have Docusign activity.

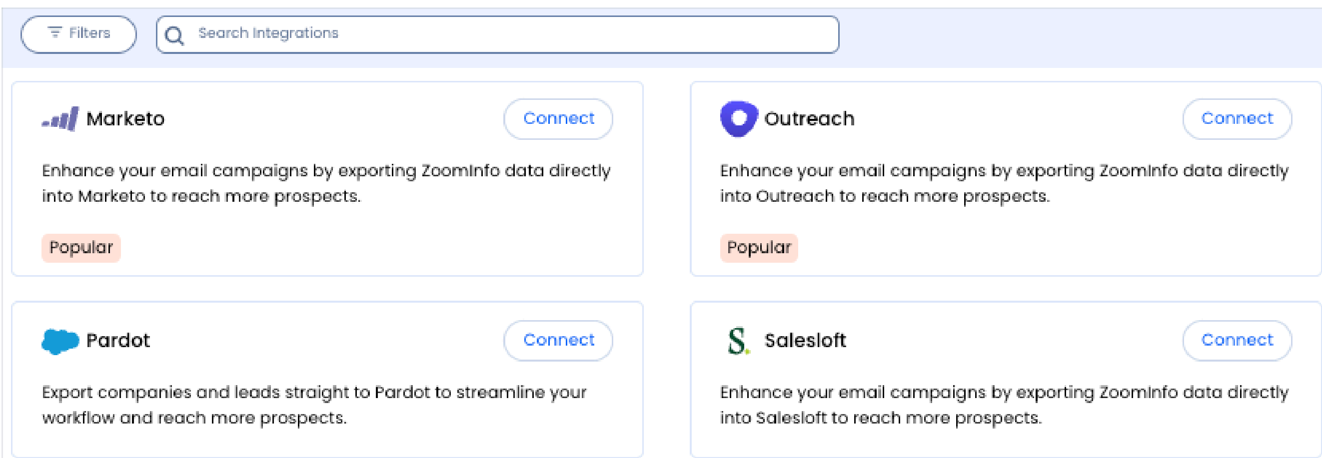
Prerequisites

To establish the connection between ZoomInfo and Docusign, you must be an admin in Docusign.

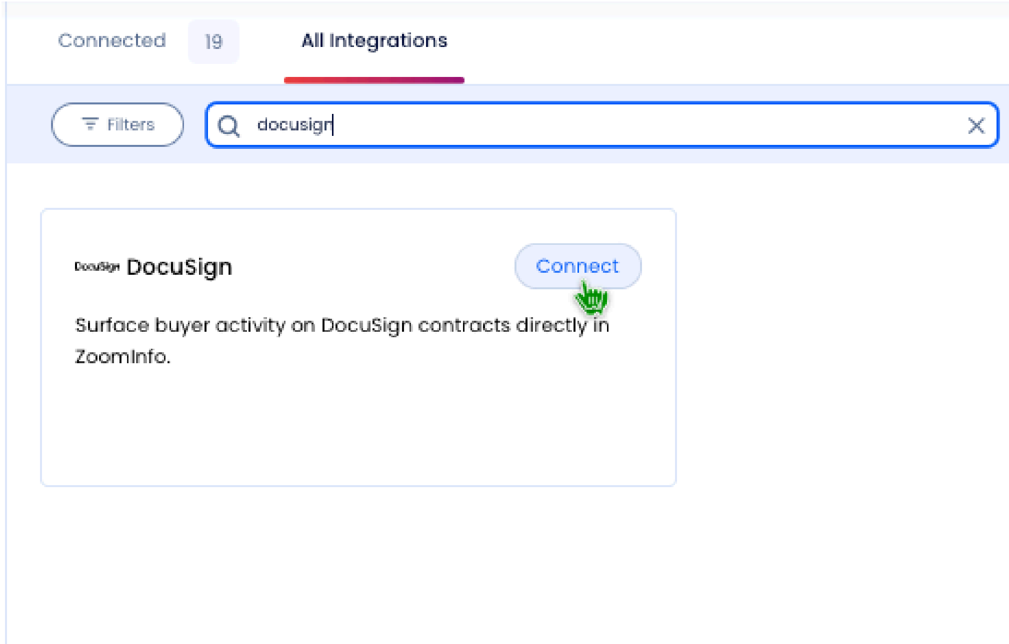
Get Connected

To connect the Docusign integration:

1. Log in to ZoomInfo and select **Admin Portal** from the waffle menu.
2. Click **Integrations > Connections**.

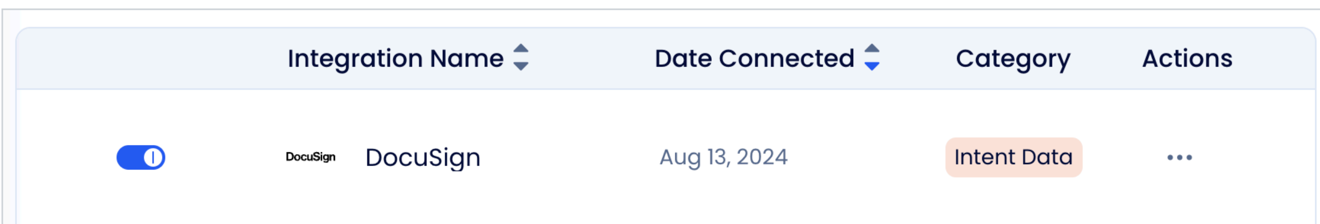


3. Use the **Filters** or **Search All integrations** options to find your integration.
4. On the tile for your integration, click **Connect**.



5. Log in to Docusign using your admin credentials.

   The toggle indicates the connection is ON.



Once you establish the connection, Docusign buyer intent data will begin populating in ZoomInfo within 24 hours.

Manage the Connection

You can do the following by clicking the Actions menu:

- Click **Actions > Settings** to go to the **General Settings** page. Here you can change the connection name.
- Click **Actions > Disconnect** to disconnect the integration.
- Click the toggle to turn the integration off for your users.

User Experience

When Docusign content is shared, delivered, signed, and declined, it will surface in the Activity Feed and in notifications