DocuSign for Quickbase

Easily route documents for electronic signature

Automate the workflow by sending documents with our DocuSign integration and have your customers sign and send back your documents within minutes. It is very easy, fast and intuitive to send and sign the document with our integration.

Highlights of DocuSign for Quickbase

- ✓ Send any type of document stored in a file attachment field from your Quickbase application(s) or a document stored in your S3 account for signing
- ✓ Specify and order any number of signers from the information stored in your Quickbase application
- ✓ Configure the tags and fields to certain lines of text so that they appear at the right location during the signing process. You can specify tags based upon the document template type
- ✓ Specify subject, email message body, expiration and reminder values for an envelope from your Quickbase application
- ✓ Bring back the information that the recipient enters during signing process and store in Quickbase
- ✓ **ACCEPT CREDIT CARDS** without violating Quickbase terms of service
- ✓ **PROCESS CREDIT CARDS** Direct integration with **Authorize.net**, **Intuit QuickBooks Payments(QBMS) and Stripe**
- ✓ **Change a recipient** after the Envelope is created in DocuSign
- ✓ **Add a CC recipient** after the Envelope is created in DocuSign
- ✓ **Void an Envelope** after it is created in DocuSign
- ✓ The **status** of the approval process is updated in real time right in Quickbase
- ✓ The fully executed document is sent back to Quickbase and stored in a file attachment/Amazon S3 field when completed
- ✓ Close the deal on the spot with **In-Person Signing**!
- ✓ **Integration with Exact Forms Plus!** to generate the documents that need to be sent to DocuSign for routing and approval
- ✓ Use the **DocuSign Dashboard** from within your Quickbase application
- ✓ Supports DocuSign access tokens so that you do not have to share your DocuSign account credentials with us
- ✓ You can send out a document for signing based upon a triggering event from a table in your Quickbase application
- ✓ Generate an envelope on behalf of another user from your DocuSign account

DocuSign Dashboard

DEMO

Powered by

For more information contact:
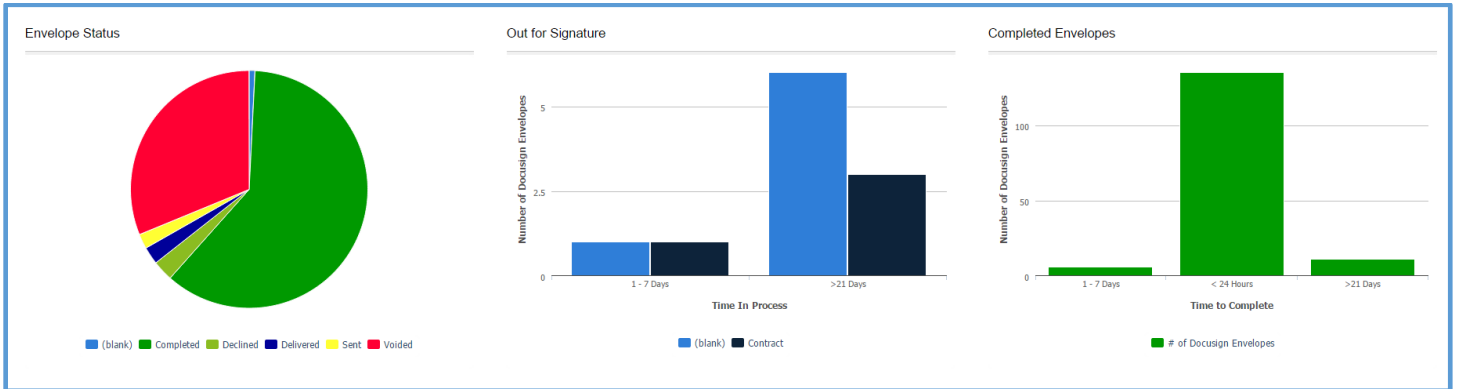info@juicedtech.com
631-617-5060
www.juicedtech.com

DocuSign for Quickbase

Envelope Status

(blank)　Completed　Declined　Delivered　Sent　Voided

Out for Signature

Number of Docusign Envelopes

Time In Process

1 - 7 Days　　>21 Days

(blank)　Contract

Completed Envelopes

Number of Docusign Envelopes

Time to Complete

1 - 7 Days　< 24 Hours　>21 Days

# of Docusign Envelopes

Images from DocuSign for Quickbase

Send to DocuSign UI

DocuSign Envelope Details

Juiced Technologies Extended Maintenance and Support Agreement

DOCUMENT　HIDE
Quote_579.pdf
SEND REMINDER　HIDE
3　(in days)
REMINDER FREQUENCY　HIDE
7　(in days)
EXPIRE ENVELOPE　HIDE
30　(in days)
EXPIRE REMINDER　HIDE
3　(in days)
ENVELOPE SENDER　HIDE
toddj@juicedtech.com

RECIPIENTS

Name	Email	Order	Action	Type	Captive Recipient
Keith Jusas	keithj@juicedtech.com	1	Signer		
Todd Jusas	toddj@juicedtech.com	2	Receive a Copy		

Create Envelope　Close　v6.5

User Experience in DocuSign

FINISH

START

DocuSign Envelope ID: 0DFBC333-A146-4FA1-88D1-A29DF8D97522

JUICED TECHNOLOGIES

3505 Veterans Highway
Suite O
Ronkonkoma, NY 11779
Ph. 631-617-5060
Fx. 631-617-5062

Quote

Quote Date: 05/30/2018
Proposal #: 579

Client: Juiced Technologies, Inc.

Extended Maintenance/Support Plan: Plan#: QEMP-579

Plan Details: For new Quick Base clients or for clients with existing Quick Base application(s) that are looking for minor modifications and/or support, we offer an "Extended Maintenance/Support Plan". We charge an upfront fee or "retainer" based on a predetermined # of hours, we charge against that retainer for time spent on development activities as well as conference calls, discovery meetings, demos, troubleshooting issues, screen shares etc.

Select your block of time　-- select --

Terms: Payment can be made via credit card or check. Once payment is received your work will be scheduled for completion. A detailed report will be provided after completion of any unit of work or upon request. That report will list the work completed and applied against your plan and it will also show the remaining balance. Our hourly billing rate is discounted for this plan based on the agreement that payment is being made prior to any work being started.

Please indicate how you would like to pay:　OK to charge the credit card on file

To pay via credit card, enter your cc info using the following link. (Your credit card is NOT charged right away, we manually charge your card for the amount of this Quote and email you a receipt after you enter your payment info.)
https://www.qbutilities.com/Juiced/Payments/default.aspx

Client Approval:　Sign　　　Date: 5/30/2018

Keith Jusas

By signing this page you agree to the terms of this Quote and you confirm that you have the authority to enter into this agreement on behalf of *Juiced Technologies, Inc.*.

Quote Valid for 30 days after the Quote Date.

For more information contact:
info@juicedtech.com
631-617-5060
www.juicedtech.com

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