



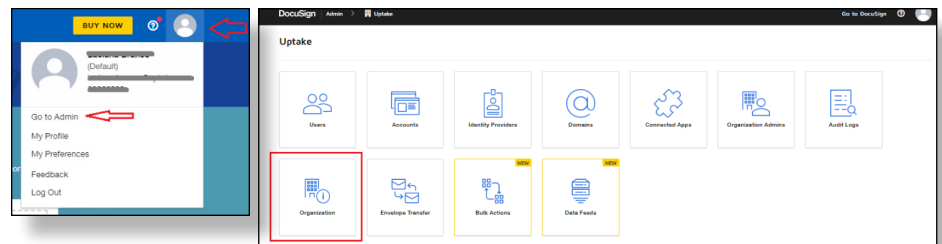
QUESTIONS? Contact Uptake Customer Service

(312) 242-2300
support@uptake.com

This guide will walk you through the steps to create API credentials in *DocuSign* so your customer can electronically sign agreements sent from *iQuote*.

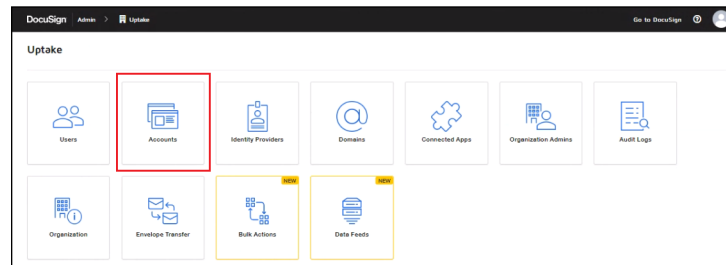
SELECT ORGANIZATION BOX

After logging into *DocuSign*, click on **Go to Admin** within the **User Profile** dropdown. Then select **Organization** (or create one, if prompted).



SELECT ACCOUNT BOX

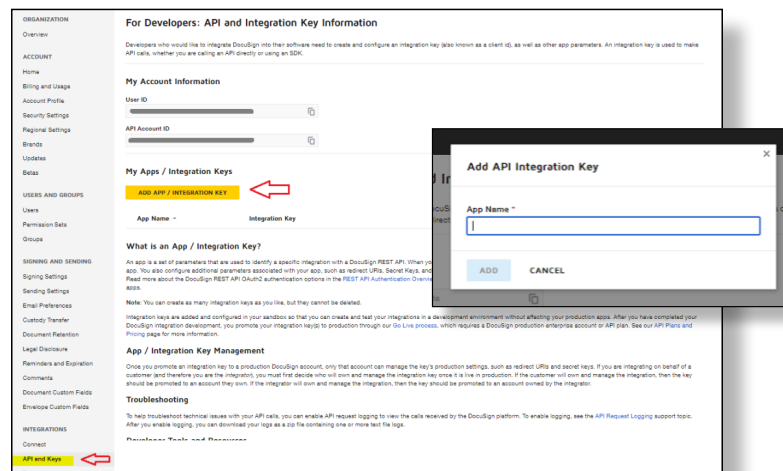
Select the **Accounts** tile in order to access developer information.



API AND KEYS

In the **My Apps/Integration Keys** section, click on **ADD APP/ INTEGRATION KEY**.

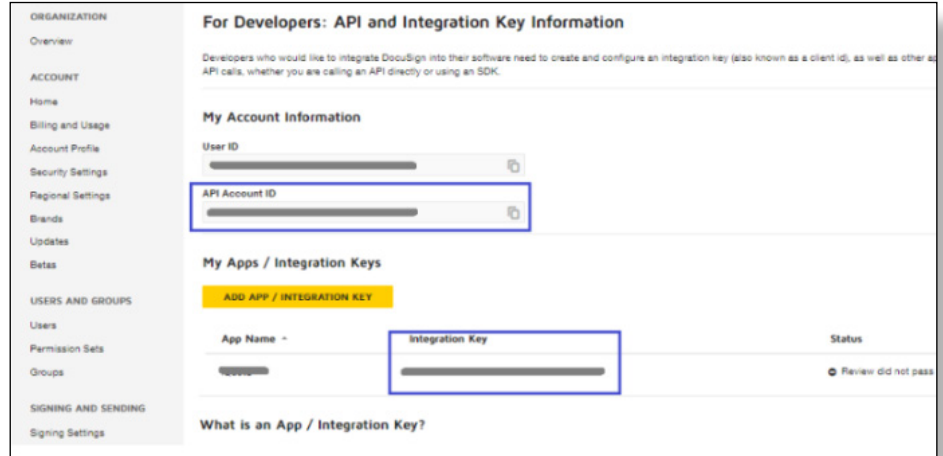
Enter the app name and click **ADD**.





API AND KEYS (CONT.)

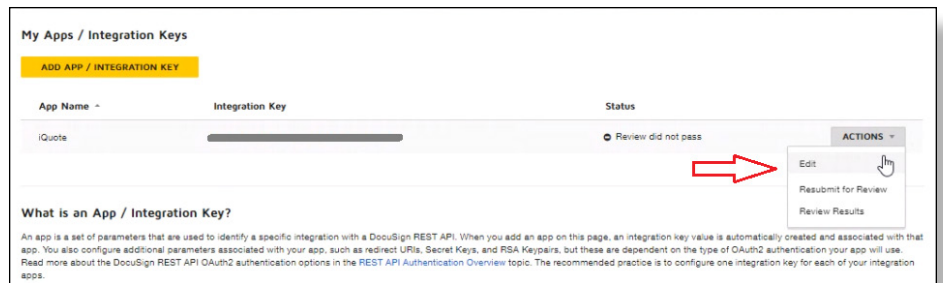
User ID and API Account ID are displayed under **My Account Information**. The **App Name** and **Integration Key** are shown under **My Apps/Integration Keys**.



RSA KEYPAIR & API USERNAME

Under the account left menu, select **API and Keys** and click the **ACTIONS** dropdown button to the right of the integration key.

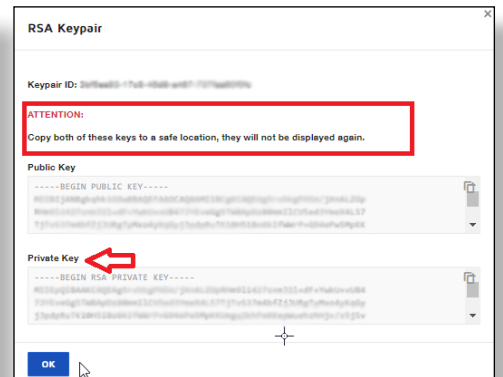
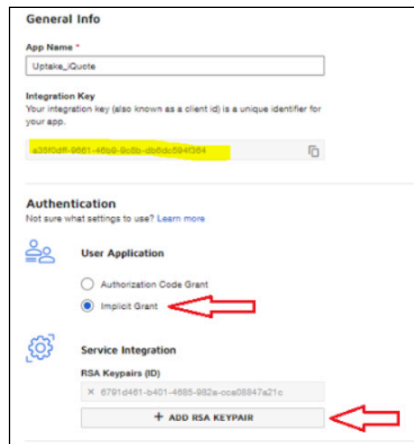
Click **EDIT** in the dropdown to select settings.



Under **Authentication**, select the **Implicit Grant** option and click **+ ADD RSA KEYPAIR** button.

Copy both keys to a safe place as they will not be displayed again.

NOTE: *iQuote* only needs the **Private Key**.



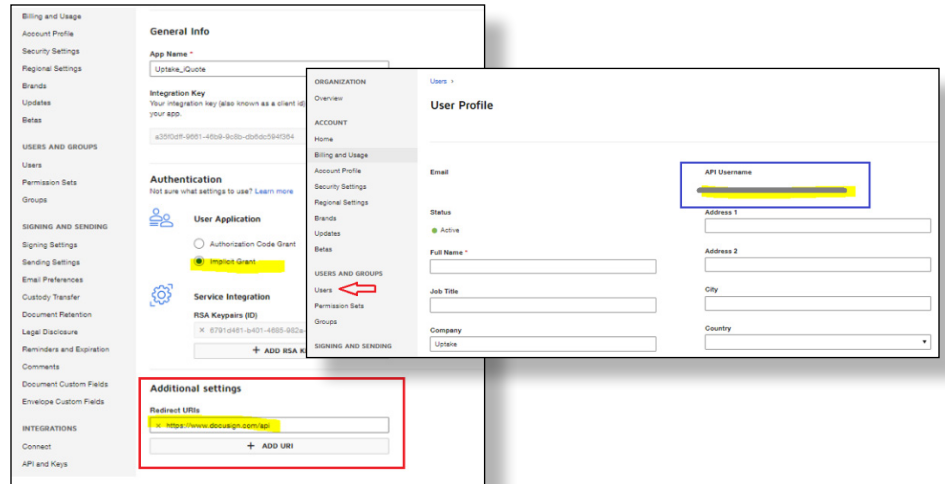


RSA KEYPAIR & API USERNAME (CONTINUED)

Under **Additional settings**, add a **Redirect URL**:

<https://www.docusign.com/api>

Under the **ORGANIZATION** menu, select **Users** to view the **API Username**.

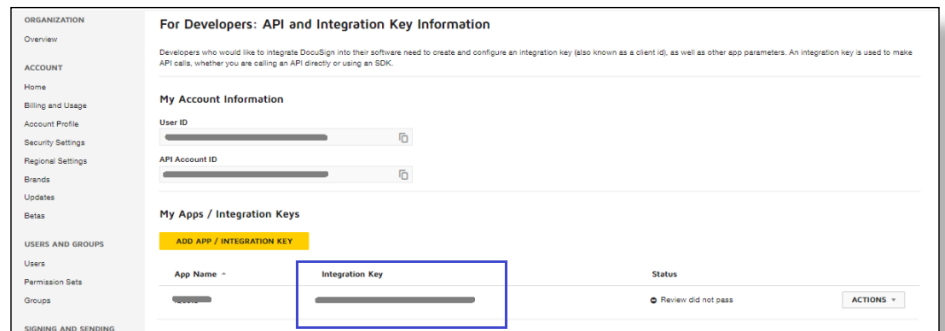


CONSENT TO IQOTE

Each Dealer needs to give its consent for *iQuote* to use its *DocuSign API Integration Key*.

Go to this address, using your dealership's **Integration Key**:

https://account-d.docusign.com/oauth/auth?response_type=token&scope=signature_impersonation&client_id={your Integration key}&redirect_uri=https://www.docusign.com/api



DEMO xLIVE API KEY

When the **Integration Key** is created, it will be in *Demo* status. After 20 API calls, the dealer can change it to **Live Production DocuSign** from the **API and Keys** menu. Select **Review Transactions** under the **ACTIONS** dropdown.

A pop-up displays to review and confirm the request to change status to a *Live DocuSign Account*.

