

Windward Reports and DocuSign Anchor Tags

This article describes Windward's out-of-the-box support for DocuSign. No extra coding, Tags or queries are needed to add DocuSign signatures to your Report Template output.

You can enter <u>DocuSign Anchor Tags and Anchor Text</u> into your Report Template, generate output, then send your output to DocuSign for signatures.

Just enter the Anchor Tags from the table below, (e.g. "/s1/") in your Report Template, apply your formatting, and the Anchor Tag will appear in your Report Template output. Then send your output to DocuSign for signature(s) - that's all there is to it!



Salesforce Role Names and Anchor Text				
Tag Type	Signer 1	Signer 2	Signer 3	Signer 4
Signature	\s1\	\s2\	\s3\	\s4\
Initial	\i1\	\i2\	\i3\	\i4\
Optional Initial	\oi1\	\oi2\	\oi3\	\oi4\
Name	\n1\	\n2\	\n3\	\n4\
Company	\co1\	\co2\	\co3\	\co4\
Title	\t1\	\t2\	\t3\	\t4\
Date Signed	\d1\	\d2\	\d3\	\d4\

For example, to add:

- A Signature tag for Salesforce Role Name Signer 2, you would type \s2\ in the document.
- A Company tag for Salesforce Role Name Signer 3, you would type: \co3\ in the document.
- A Title tag for Salesforce Role Name Signer 1, you would type: \t1\ in the document.