

# Salesforce Agreement Process

Initiate  
Salesforce  
Approval Process

- Route Agreement through all steps prior to Contract Execution

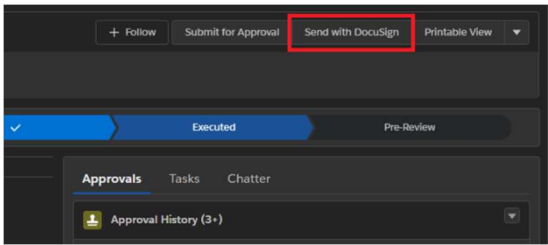
DocuSign  
Document  
Routing

- Procurement Lead creates and routes DocuSign envelope to vendor and SDWP executive
- Unable to route documents on unapproved Salesforce agreements

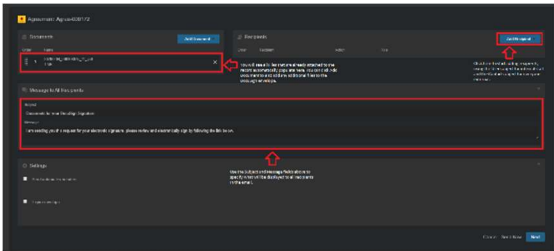
Complete  
Salesforce  
Approval Process

- Agreement is automatically executed when the DocuSign document is signed by all parties.

# DocuSign Steps to Send Documents



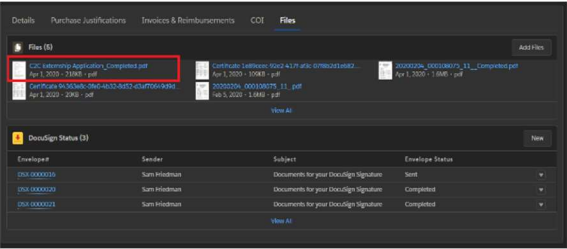
**Step 1.** Click Send with DocuSign Button



**Step 2.** Add Documents, Recipients, and Email Message



**Step 3.** Add signature & merge fields, review, and send



**Step 4.** Once document is signed by all recipients, it is automatically emailed to the Sender and all Recipients, and it is also attached to the Agreement record.

Detailed instructions can be found in this [Salesforce knowledge article](#).