

DocupletionForms Integration Architecture

***End-to-End Workflow: Google Sheets → Zapier → DocupletionForms → Airtable
→ Make.com → DocuSign → Airtable (Status Feedback)***

1. High-Level System Overview

- Google Sheets acts as an upstream trigger source.
- Zapier listens for new rows and submits data into DocupletionForms.
- DocupletionForms performs conditional logic processing and PDF data-merge.
- Zapier sends submission data into Airtable (Orchestration Layer).
- Airtable manages scheduling, batching, and state transitions.
- Make.com executes document workflows and manages DocuSign envelopes.
- DocuSign handles signature collection.
- Make updates Airtable with envelope and completion status.

2. Submission Entry Points

- A. Google Sheets → Zapier → DocupletionForms
 - - New row triggers Zap.
 - - Zap submits structured data to DocupletionForms API.
 - - Triggers form submission and PDF data-merge.
- B. CSV Mass Uploader (Inside DocupletionForms)
 - - Bulk client CSV uploaded.
 - - Multiple submissions created simultaneously.
 - - Each submission enters the same downstream workflow.

3. Airtable as Integration Hub (State Machine)

- Primary Table: FormSubmissions
 - - Submission ID
 - - Client (Linked)
 - - Scheduled Release Time
 - - Batch Group
 - - Processing Status (Controlled Enum)
 - - Make Trigger Timestamp
 - - DocuSign Envelope ID
- Supporting Tables:
 - - PDFDocuments (Document lifecycle tracking)
 - - Clients (Client records)
 - - WorkflowStatus (Event audit log)

4. Airtable Automations

- Incoming Submission Automation:
 - - Trigger: New record created.
 - - Sets Processing Status to 'Received'.
 - - Applies scheduling rules.
- Scheduled Processing Automation:
 - - Trigger: Scheduled Time reached AND Status = Scheduled.
 - - Updates Status to 'Sent to Make'.
 - - Calls Make webhook.

5. Make.com Execution Engine

- Scenario 1: Processing
 - - Receive Airtable webhook.
 - - Generate or confirm PDF.
 - - Create DocuSign Envelope.
 - - Write Envelope ID back to Airtable.
- Scenario 2: DocuSign Tracking
 - - Webhook or polling from DocuSign.
 - - Update PDFDocuments table.
 - - Update FormSubmissions status.

6. Operational Controls & Safeguards

- Use controlled status enums to prevent automation loops.
- Implement Integration Lock field to prevent double processing.
- Store timestamps in UTC to avoid timezone drift.
- Maintain WorkflowStatus table for full audit trail.
- Use fallback polling for DocuSign webhook reliability.

7. Complete Workflow Sequence (Linear View)

- 1. Google Sheets row added (OR CSV uploaded in DocuptionForms).
- 2. Zapier submits data to DocuptionForms.
- 3. DocuptionForms performs data-merge and generates PDF.
- 4. Zapier sends submission record to Airtable.
- 5. Airtable schedules and queues submission.
- 6. Airtable triggers Make at scheduled time.
- 7. Make generates DocuSign envelope.
- 8. DocuSign sends status updates to Make.
- 9. Make updates Airtable with envelope and completion status.
- 10. Client Portal reflects real-time status from Airtable.

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