

# Docusign + GoodTime Integration

Updated Aug 4, 2022

## Overview

This is a step-by-step guide for integrating Docusign with GoodTime. With this integration, you can easily add links to your Docusign PowerForms (example: NDA) into your interviews in GoodTime, and be informed whether the candidate has signed the Docusign PowerForm.

These integration steps only need to be performed ONCE by a user for the whole team. Once set up properly, it should continue to work unless the Docusign PowerForm URL has changed

First, make sure you have the following permissions:

- You must have the **admin** role access in your company's Docusign account
- You must have **super admin** access in GoodTime (Your Talent Acquisition team leaders should know the list of GoodTime super admins)

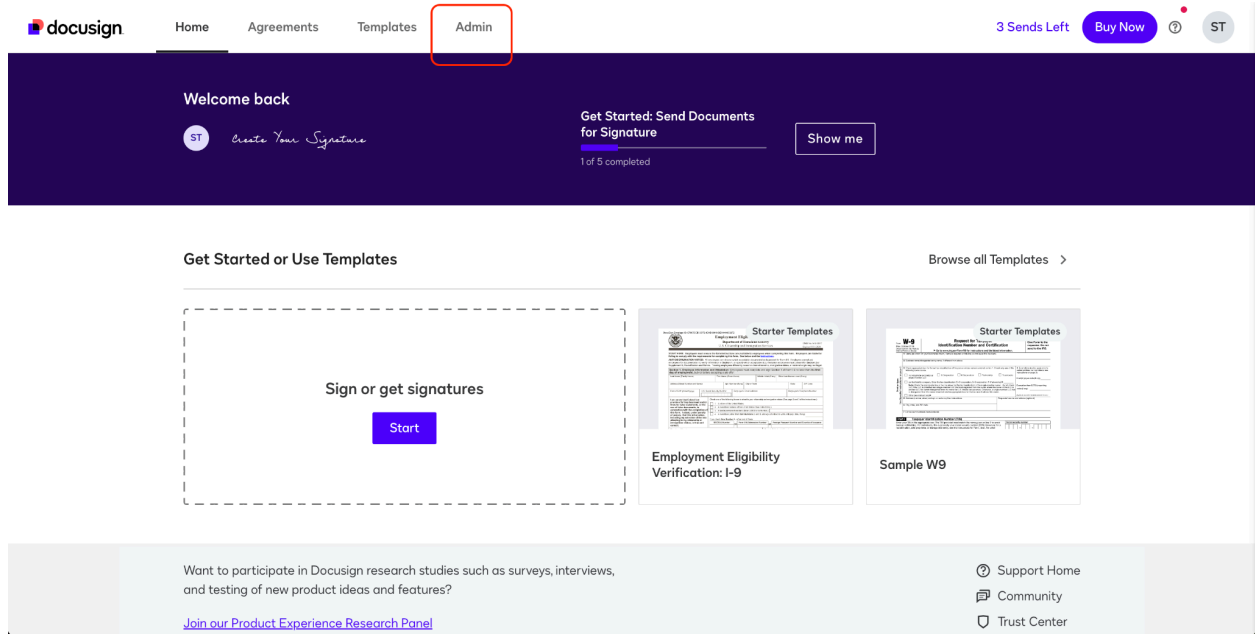
In this guide, you will learn how to:

- Set up the Docusign <> GoodTime integration
- Insert a Docusign PowerForm URL in GoodTime
- Be informed whether the candidate has signed the Docusign PowerForm

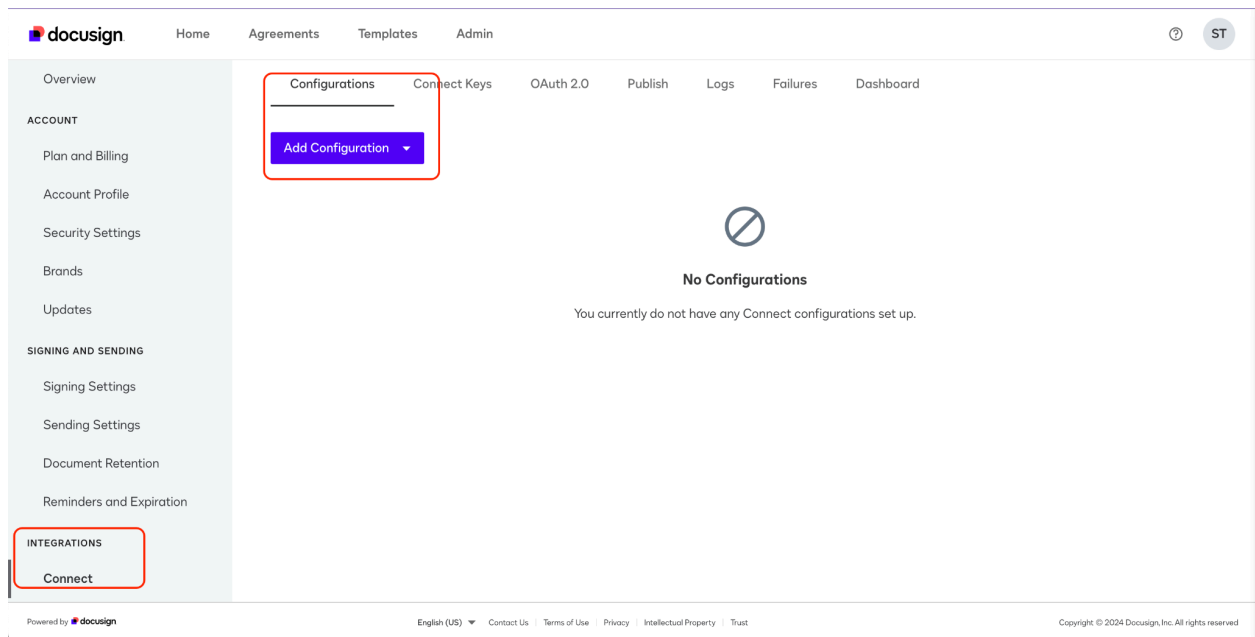
## Set up Docusign <> GoodTime integration

### Section A: Setting up Custom Fields

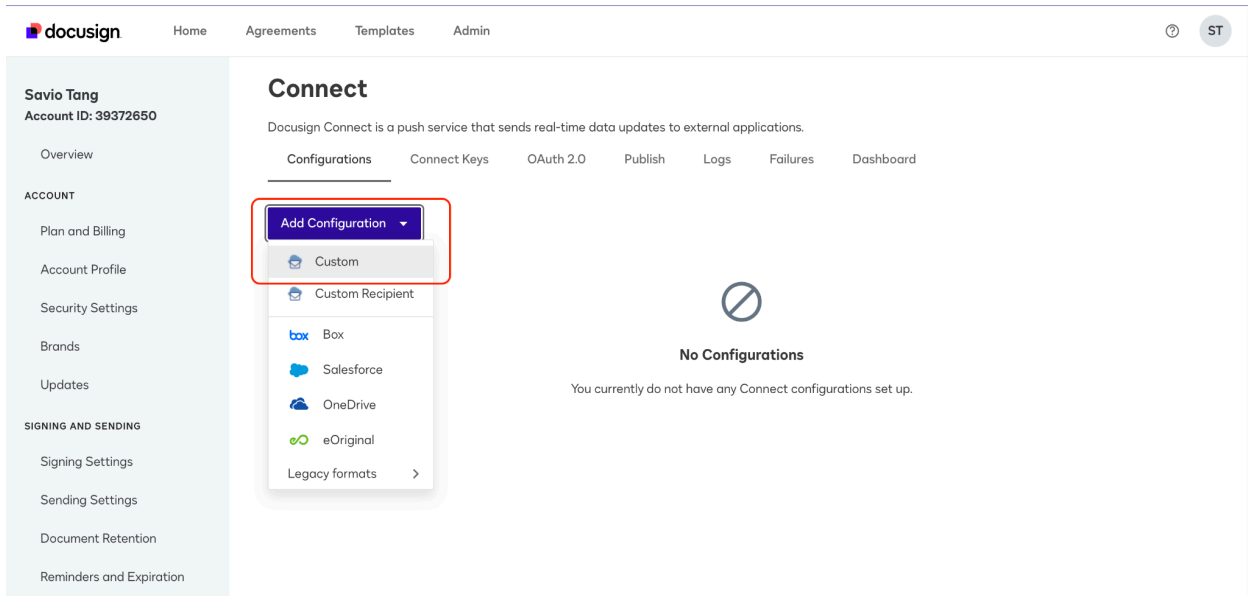
1. From your Docusign Home, Go to "Admin"



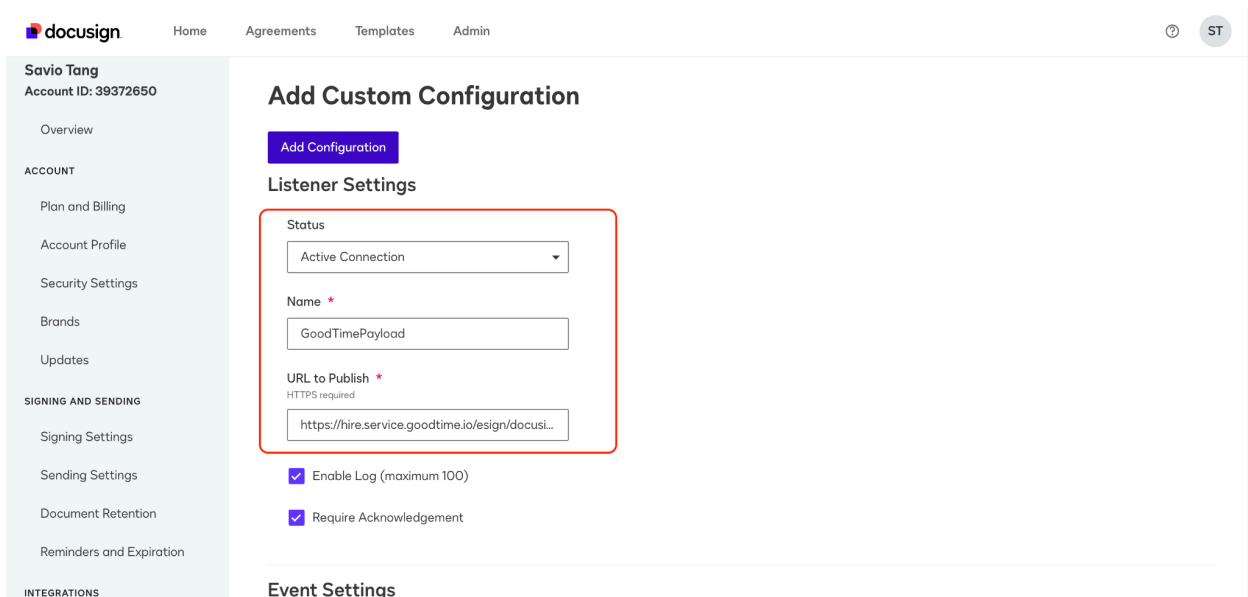
2. On the left menu, go to “Integrations”->”Connect”. Under “Configurations”->”Add Configuration”



3. Choose “Custom”



4. In “Listener Settings”, Status should be “Active Connection”, set name to “GoodTimePayload”. The URL to Publish should be:  
<https://hire.service.goodtime.io/esign/docusign/callback>  
Make sure to check both checkboxes “Enable Log...” and “Require Acknowledgement”.



5. Under the “Event Settings” session, make sure Data Format is “REST v2.1” and Delivery Mode is “Send Individual Message (SIM)”

**docusign** Home Agreements Templates Admin ? **ST**

INTEGRATIONS

- Connect
- Apps and Keys
- API Usage Center
- CORS

### Event Settings

**Data Format**  
This cannot be changed once the configuration is saved.

REST v2.1

**Event Message Delivery Mode** ?  
This cannot be changed once the configuration is saved.

Send Individual Messages (SIM)

**Trigger Events**

- Envelope and Recipients
- Template
- Docusign Click ?
- SMS Delivery ?

6. Under the “Envelope and Recipients” section, check all the options

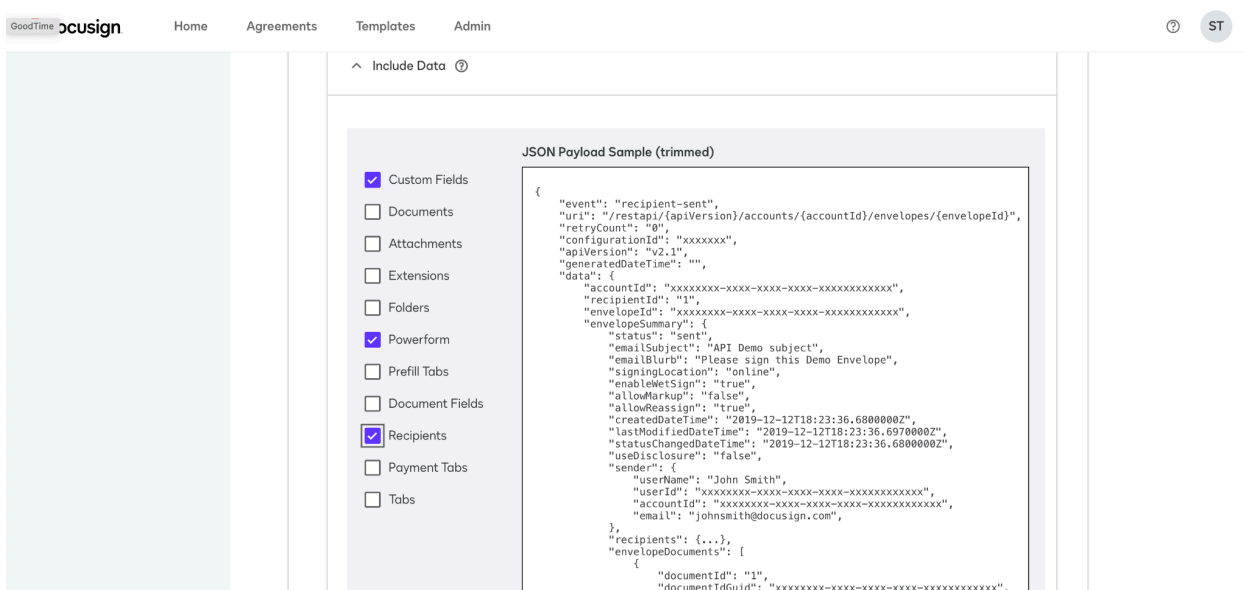
**docusign** Home Agreements Templates Admin ? **ST**

Envelope and Recipients

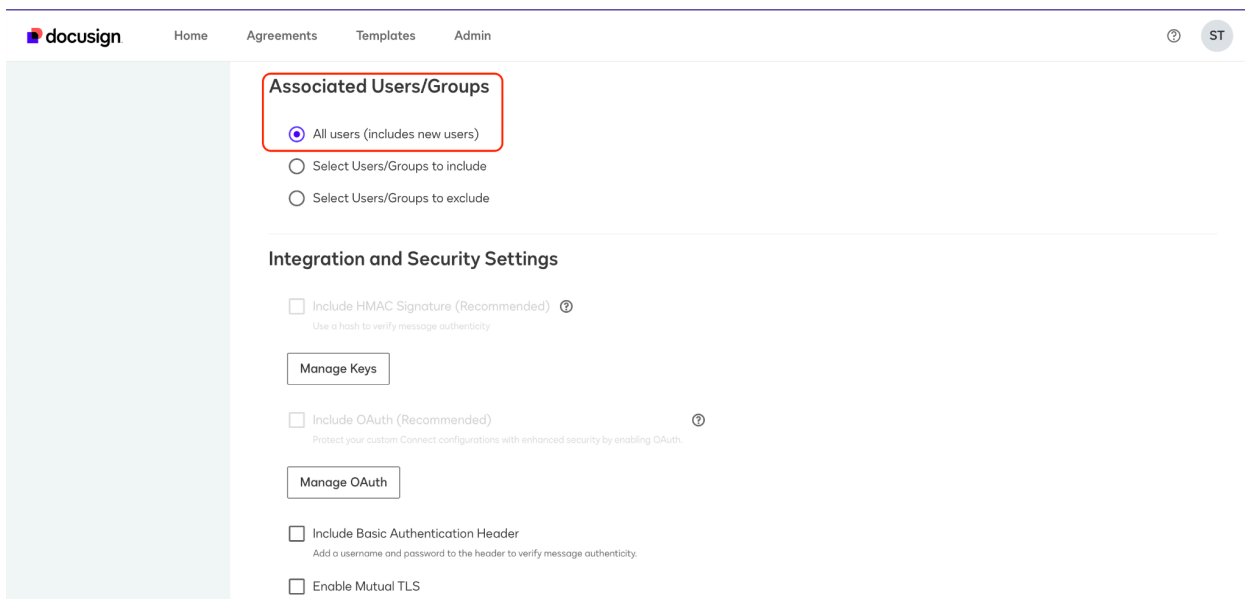
Envelope Events:	Recipient Events:
<input checked="" type="checkbox"/> Envelope Sent	<input checked="" type="checkbox"/> Recipient Sent
<input checked="" type="checkbox"/> Envelope Delivered	<input checked="" type="checkbox"/> Recipient Auto Responded
<input checked="" type="checkbox"/> Envelope Signed/Completed	<input checked="" type="checkbox"/> Recipient Delivered
<input checked="" type="checkbox"/> Envelope Declined	<input checked="" type="checkbox"/> Recipient Signed/Completed
<input checked="" type="checkbox"/> Envelope Voided	<input checked="" type="checkbox"/> Recipient Declined
<input checked="" type="checkbox"/> Envelope Resent	<input checked="" type="checkbox"/> Recipient Authentication Failure
<input checked="" type="checkbox"/> Envelope Corrected	<input checked="" type="checkbox"/> Recipient Resent
<input checked="" type="checkbox"/> Envelope Purge	<input checked="" type="checkbox"/> Recipient Delegate
<input checked="" type="checkbox"/> Envelope Deleted	<input checked="" type="checkbox"/> Recipient Reassign
<input checked="" type="checkbox"/> Envelope Discard	<input checked="" type="checkbox"/> Recipient Finish Later
<input checked="" type="checkbox"/> Envelope Created	
<input checked="" type="checkbox"/> Envelope Removed	

Include Data ?

7. Under the “Include Data” section, make sure to check “Custom Fields”, “Powerform” and “Recipients”



## 8. Under the “Associated Users/Groups” section, select “All users”



## 9. Double check if you performed the above step correctly. The result should look like this:

docusign

Home

Agreements

Templates

Admin

?

ST

Savio Tang

Account ID: 39372650

Overview

ACCOUNT

Plan and Billing

Account Profile

Security Settings

Brands

Updates

SIGNING AND SENDING

Signing Settings

Sending Settings

Document Retention

Reminders and Expiration

Connect

DocuSign Connect is a push service that sends real-time data updates to external applications.

Configurations

Connect Keys

OAuth 2.0

Publish

Logs

Failures

Dashboard

Add Configuration

Name	Configuration ID	Status	Failures	
<div><div></div>GoodTimePayload</div>	10130343	<div>Active</div>	0	<div>Actions</div>

## Insert a Docusign PowerForm URL in GoodTime

1. In Docusign:

1. On the **Agreements** tab, select the **PowerForms** folder on the left panel to display all of your PowerForms.
2. Locate the PowerForm you want to distribute by searching, filtering, or simply scanning the list.
3. Select the actions menu for the PowerForm and select **Copy URL**.

	Name	Responses	Status	Sender	
<input type="checkbox"/>	Conference Registration Conference Registration - 2019	3/52	● Active	Jeff Silverman	<div>DOWNLOAD ▾</div> <div>Edit</div> <div>View Envelopes</div> <div>Copy URL</div> <div>Deactivate</div> <div>Change Sender</div> <div>Delete</div>
<input type="checkbox"/>	Conference Registration - Central Region Conference Registration	0	● Active	Jeff Silverman	
<input type="checkbox"/>	Conference Registration - Eastern Region Conference Registration	1	● Active	Jeff Silverman	
<input type="checkbox"/>	Contracting Services - 3 Contracting Services	0	● Inactive	Jeff Silverman	

4. Select one of the tabs in the PowerForm URL dialog box and select **COPY**.
  - **URL LINK**: A link to the PowerForm landing page. Then paste the link into a browser or other location to use or record.
  - **EMBED CODE**: An HTML <a> tag specifying a hyperlink with an href attribute. This tag indicates the link's destination on the PowerForm landing page.

Copy PowerForm URL

URL

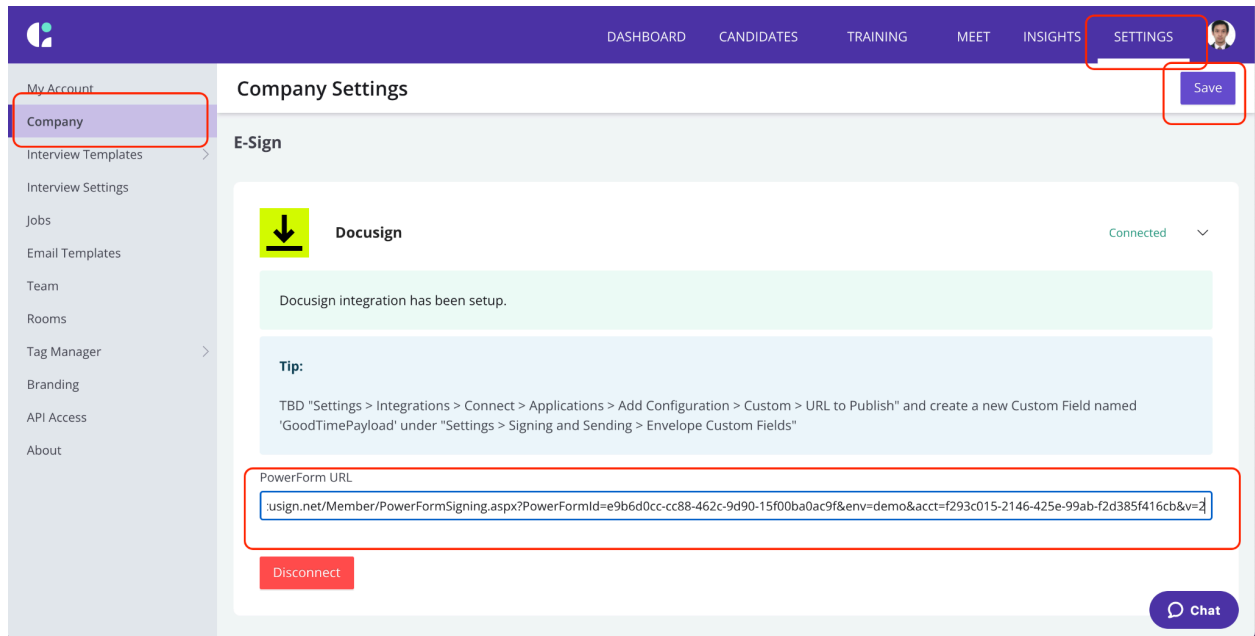
<https://stage.docusign.net/Member/PowerFormSigning.aspx?Power...>

Embed

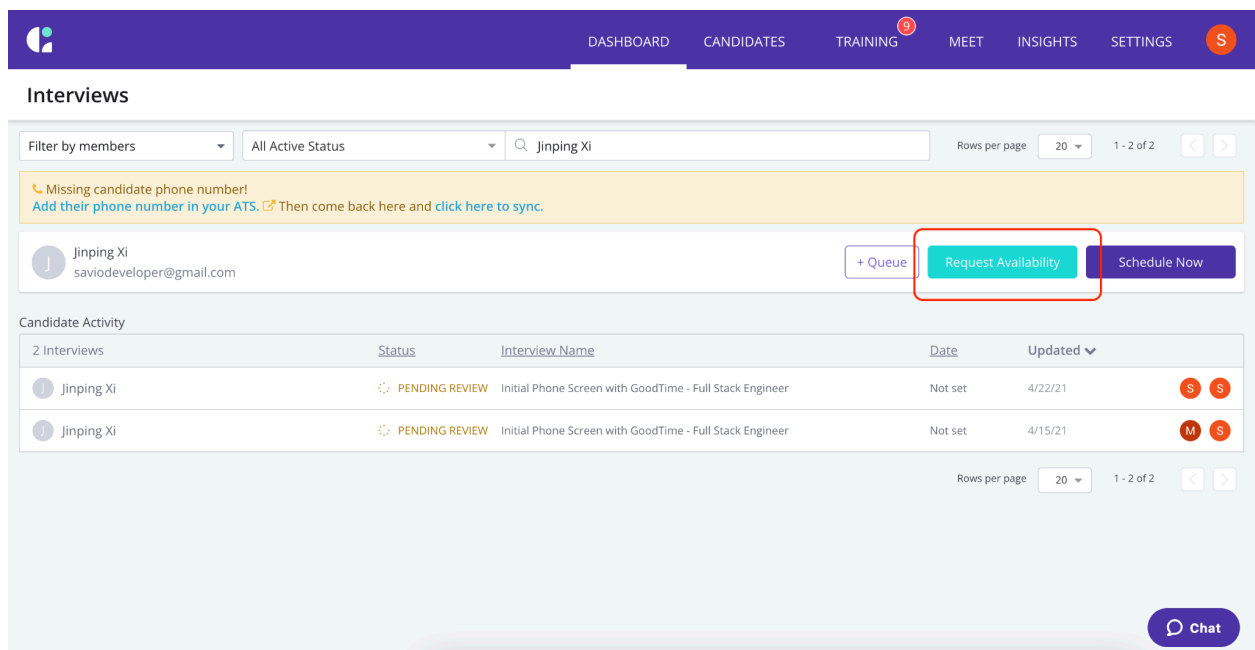
[<a href="https://stage.docusign.net/Member/PowerFormSigning.as...](https://stage.docusign.net/Member/PowerFormSigning.as...)

Done


2. Remember to use the copy button on the right side:  
 \*\*\* URL must be in raw format - if the user drag the mouse over URL to copy the value, it might get truncated and integration wouldn't work as expected \*\*\*
3. Inside GoodTime, under "Settings", select "Company" on the left-side-pane, scroll down to the "E-sign" section. You should see the "Docusign" section. Paste the URL from the previous step into the box and remember to click "Save" on top.



- In GoodTime's "Request Availability" or "Schedule Now" workflow a user can insert a variable token "`$Docusign.PowerForm`" into the Email body text area. The variable token, when resolved, will pass interview information between GoodTime and Docusign. The following screenshot shows how to use the variable token in the "Request Availability" workflow:





DASHBOARDCANDIDATESTRAINING9MEETINSIGHTSSETTINGS

Request availability from Jinping Xi

247 Available interview slotsRequest Availability

Initial Phone Screen with GoodTime - Full Stack Engineer

Description

B I ≡ ≡ ☰

Hello **Jinping**,

We think you maybe a fit for **Full Stack Engineer**. We will connect with you on **\$Interview.Zoom.Link** at **\$Interview.Start.DateTime**.

Should you need to reschedule you can use the Event Confirmation link below to reschedule your day and time.

If you have any questions please don't hesitate to reach out.

**Savio**  
**\$Coordinator.PhoneNumber**  
**savio@goodtimedemo.com**

Interviewer Event Description

Description

B I ≡ ≡ ☰

Email Template

Request Availability - Initial Phone Screen

Delivery Time

Send Now

Subject

Hi **Jinping**, Connecting with GoodTime!

B I ≡ ≡ ☰

Hi **\$Candidate.FirstName**,

Thanks for your interest in the **\$Job.Name** role. We would like to spend some time getting to know you and discussing the role.

Before proceeding to scheduling, please sign this NDA document:  
**\$DocuSign.PowerForm**

Please use the green FIND A TIME link below to select a few days and times that work best for you!

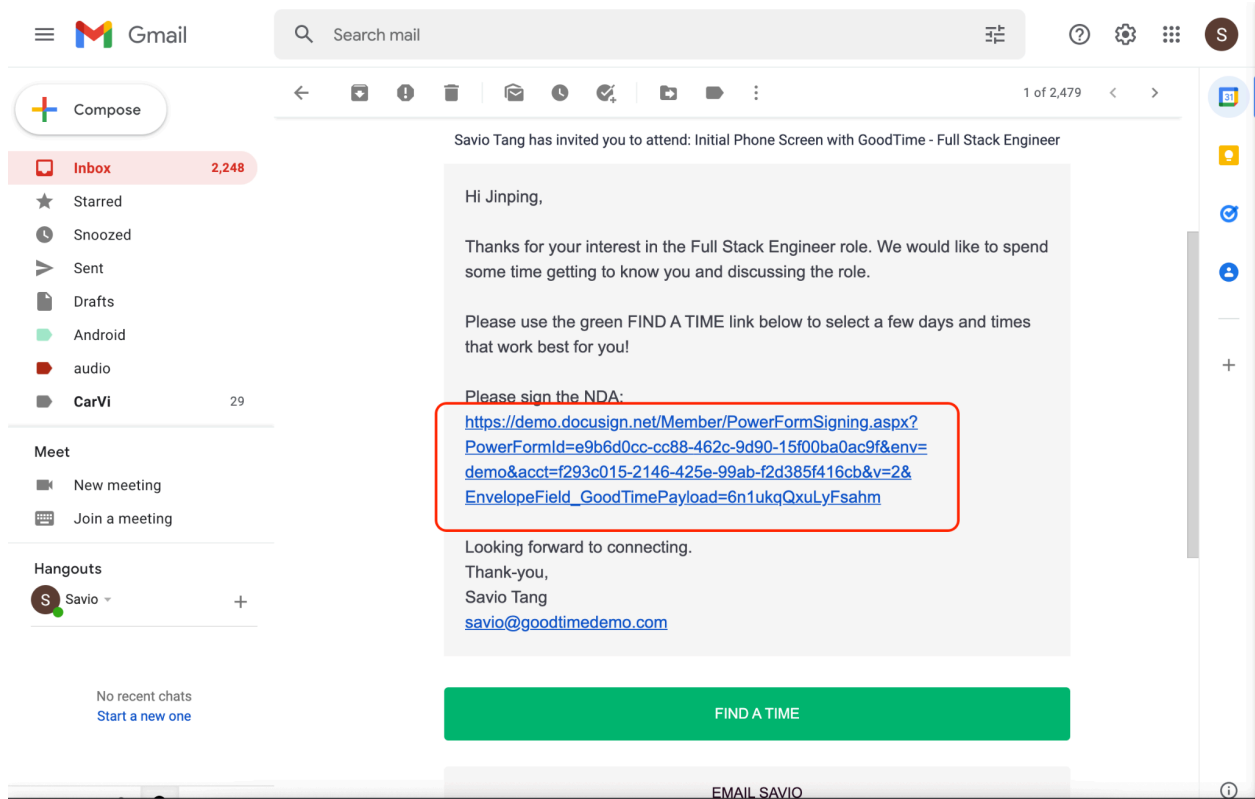
Looking forward to connecting.

Thank-you,  
**\$Recruiter.FullName**  
**\$Recruiter.Email**

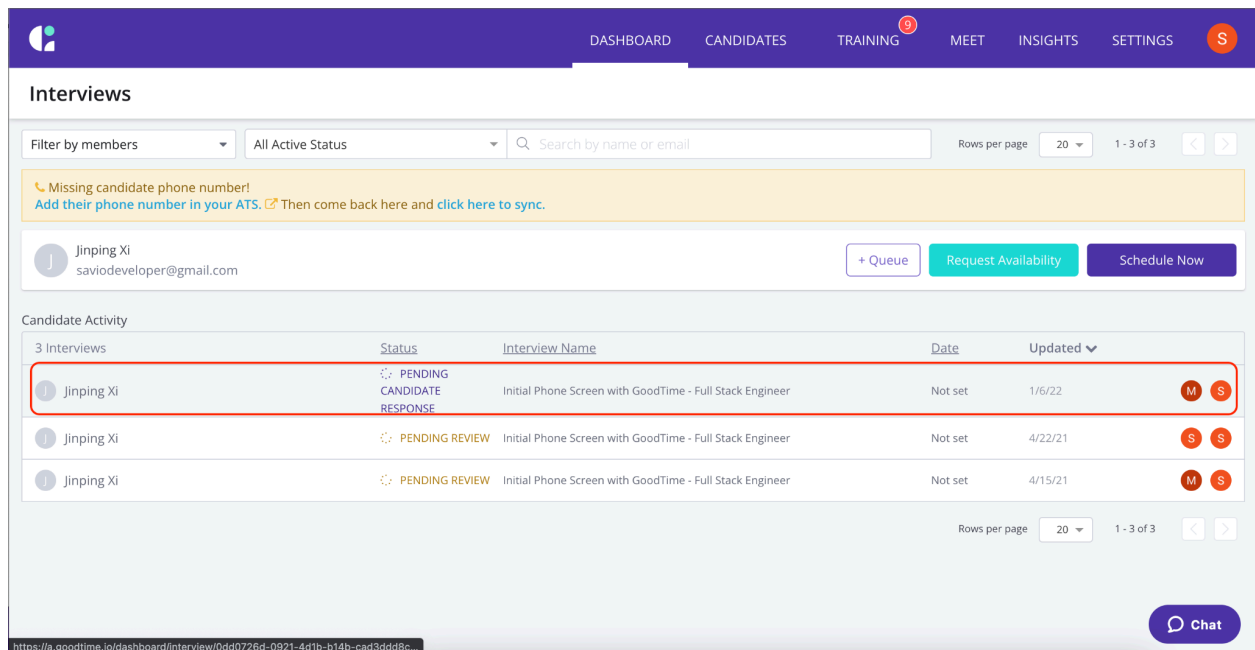
Attach Files (File types supported: pdf, img, png, docx, pptx, xlsx. Total file size limit: 10MB)

Chat


When the candidate receives the email, the variable token will be resolved into the DocuSign PowerForm URL:



To check if a candidate has signed the PowerForm, click on the relevant interview from GoodTime Dashboard:



If the candidate has signed the PowerForm, a note will be inserted in the Notes area:



Interviews

Filter by members

All Active Status

Search

Missing candidate phone number!  
Add their phone number in your ATS. Then come back here and click here to sync.

Jinping Xi  
saviodeveloper@gmail.com

Candidate Activity

3 Interviews	Status	Interview Name
Jinping Xi	PENDING CANDIDATE RESPONSE	Initial Phone Sc
Jinping Xi	PENDING REVIEW	Initial Phone Sc
Jinping Xi	PENDING REVIEW	Initial Phone Sc

Close

Update

Continue >

View full history

Recruiter

Manuel Carrillo  
manuel@goodtimedemo.com

Coordinator

Savio Tang  
savio@goodtimedemo.com

Hiring Manager

Elias Cruz  
elias@goodtimedemo.com

Sourcer

Assign to me

ACTIVITY

Add a note

e.g. Candidate asked to be rescheduled in the afternoon

POST

Note from Savio Tang

Candidate completed eSign form

5:54 PM

Chat

Notes:

Variables supported are:

- `$DocuSign.PowerForm` - to pull the DocuSign PowerForm URL