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)

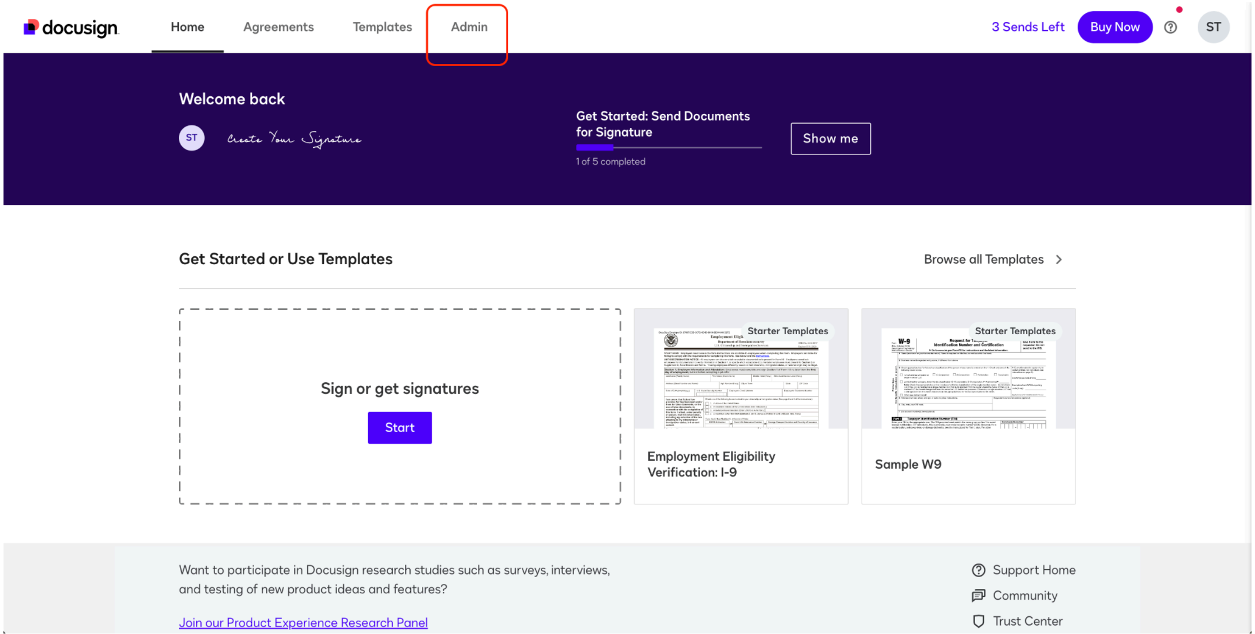
In this guide, you will learn how to:

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

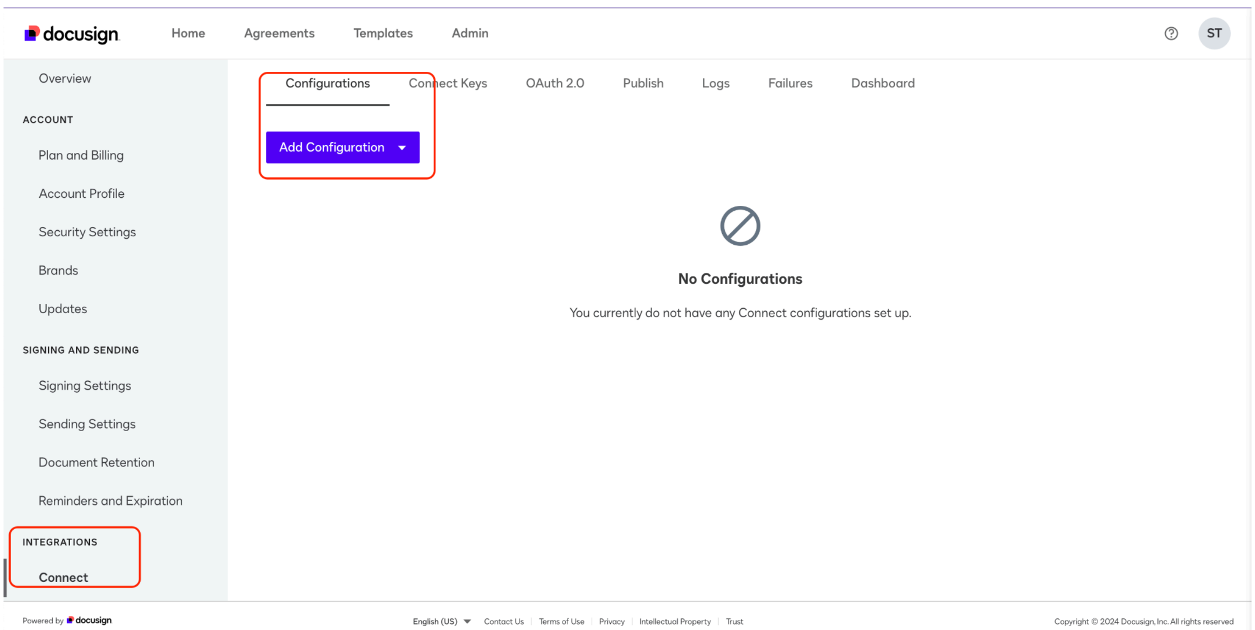
Set up Docusign <> GoodTime integration

Section A: Setting up Custom Fields

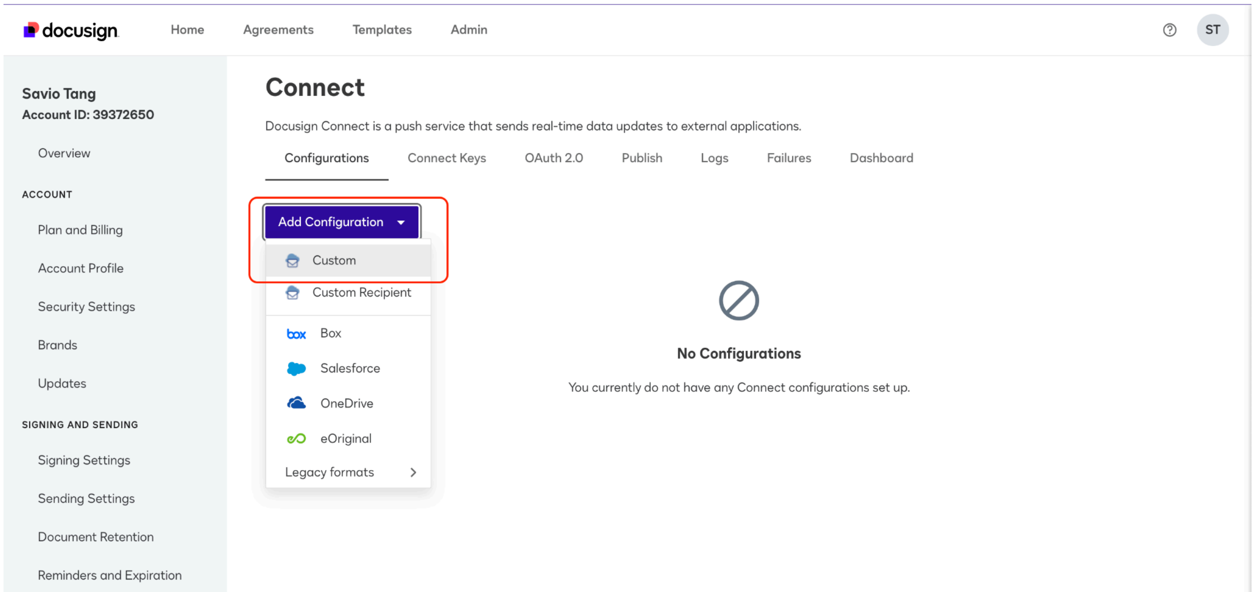
1. From your Docusign Home, Go to "Admin"



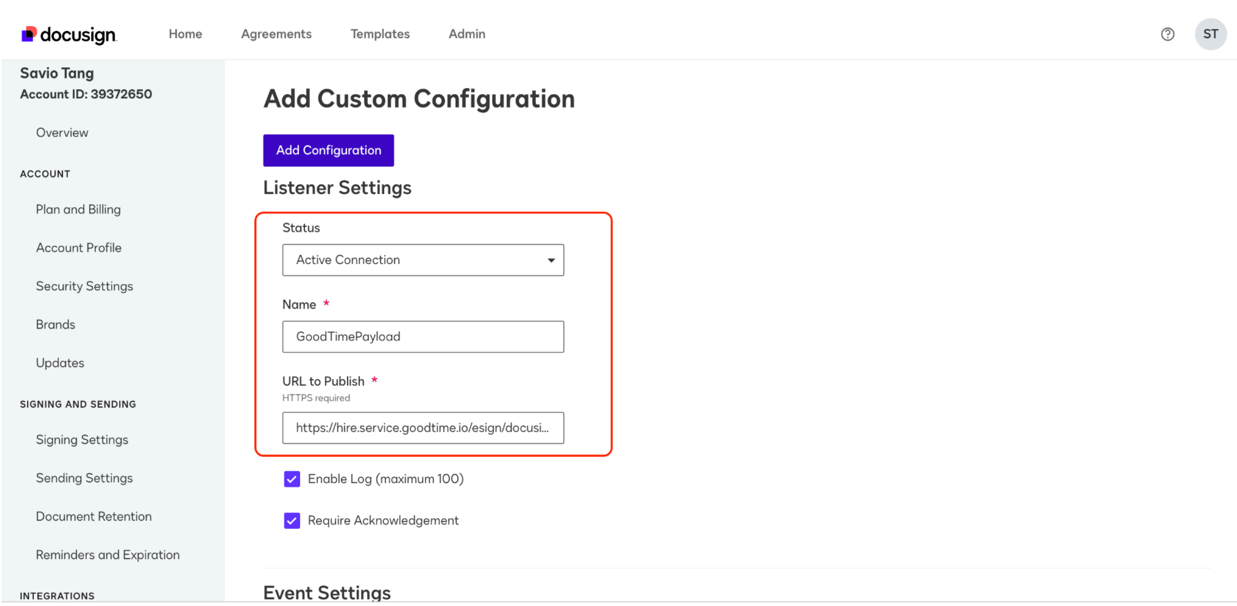
2. On the left menu, go to "Integrations"->"Connect". Under "Configurations"->"Add Configuration"



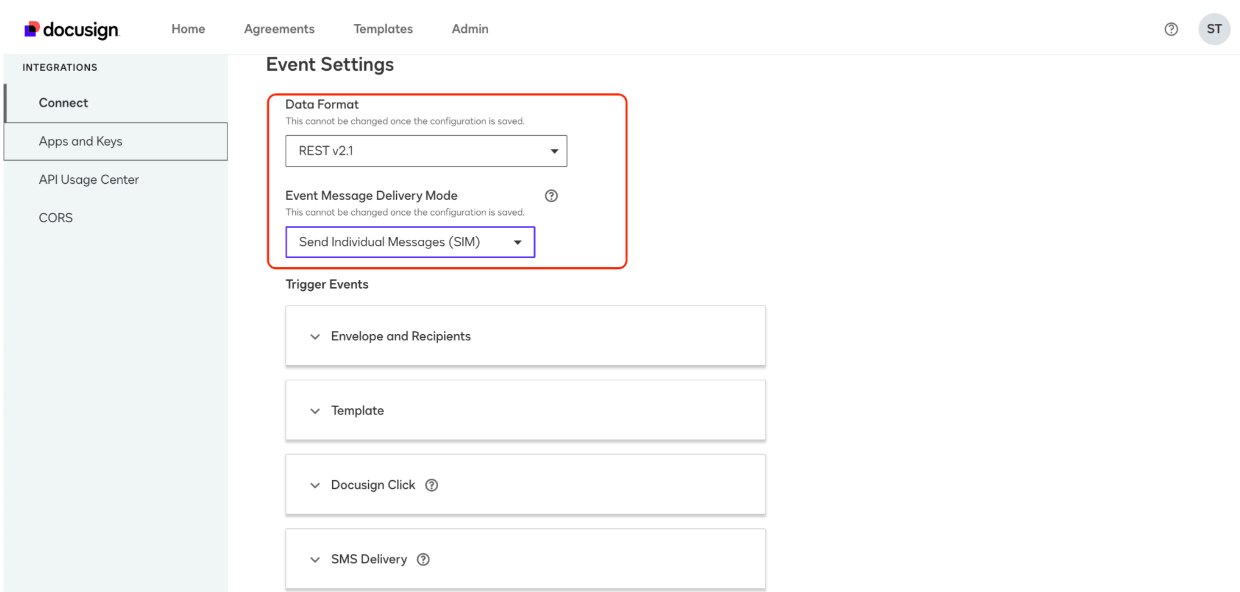
3. Choose "Custom"



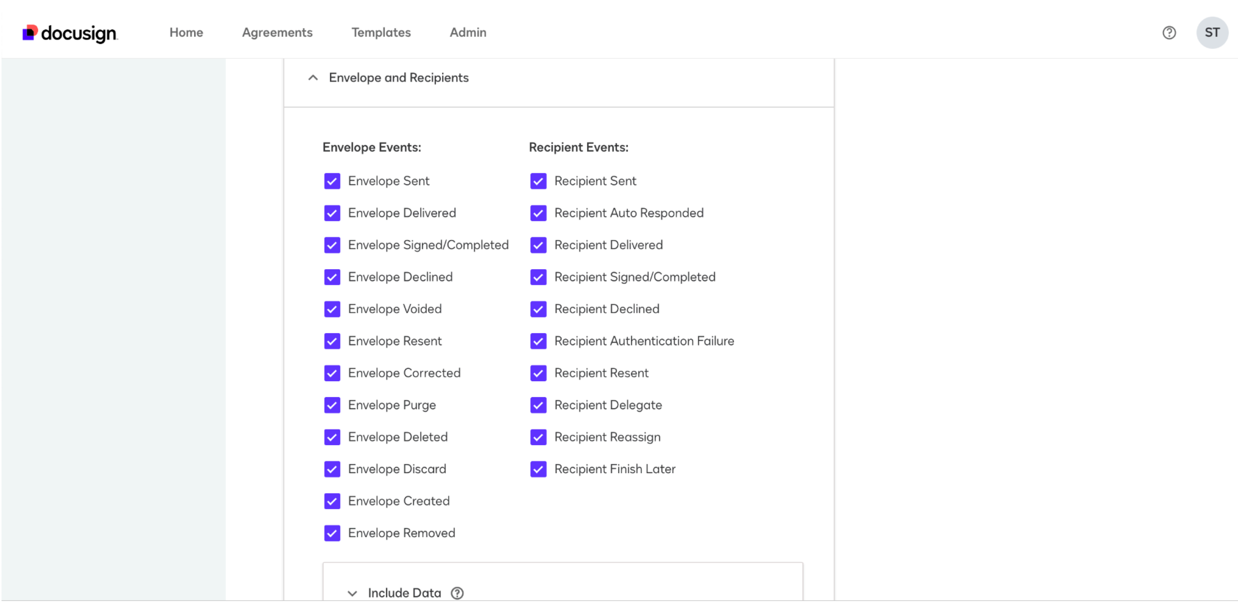
4. In “Listener Settings”, Status should be “Active Connection”, set name to “GoodTimePayload”. The URL to Publish should be: https://hire.service.goodtime.io/esign/docusign/callback
Make sure to check both checkboxes “Enable Log…” and “Require Acknowledgement”.



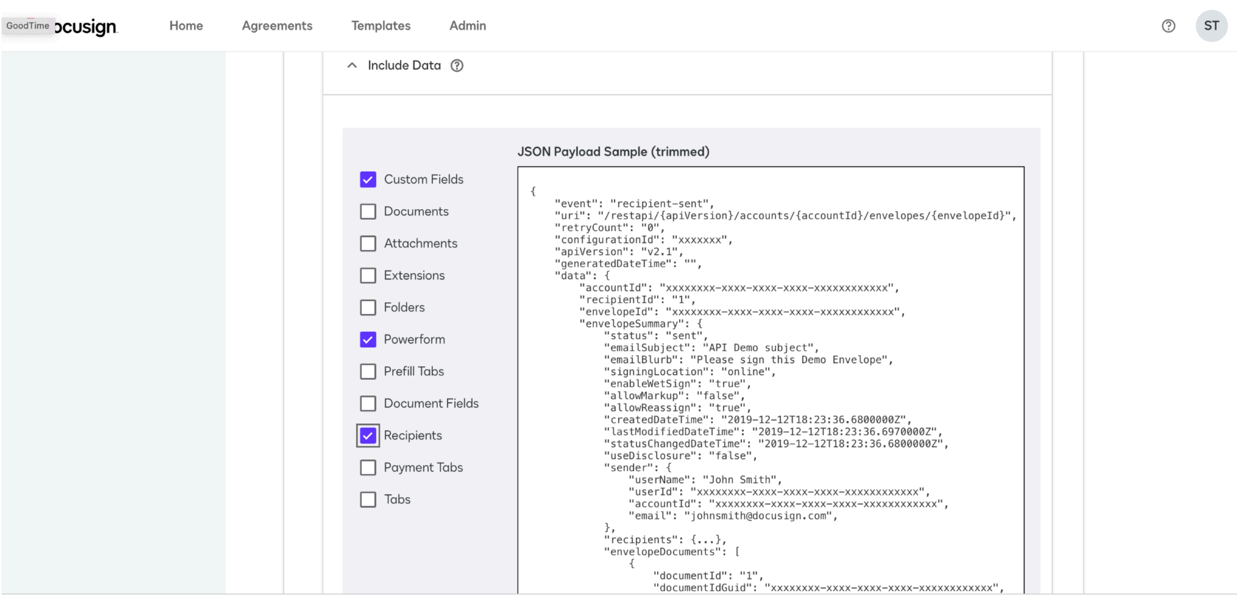
5. Under the “Event Settings” session, make sure Data Format is “REST v2.1” and Delivery Mode is “Send Individual Message (SIM)”



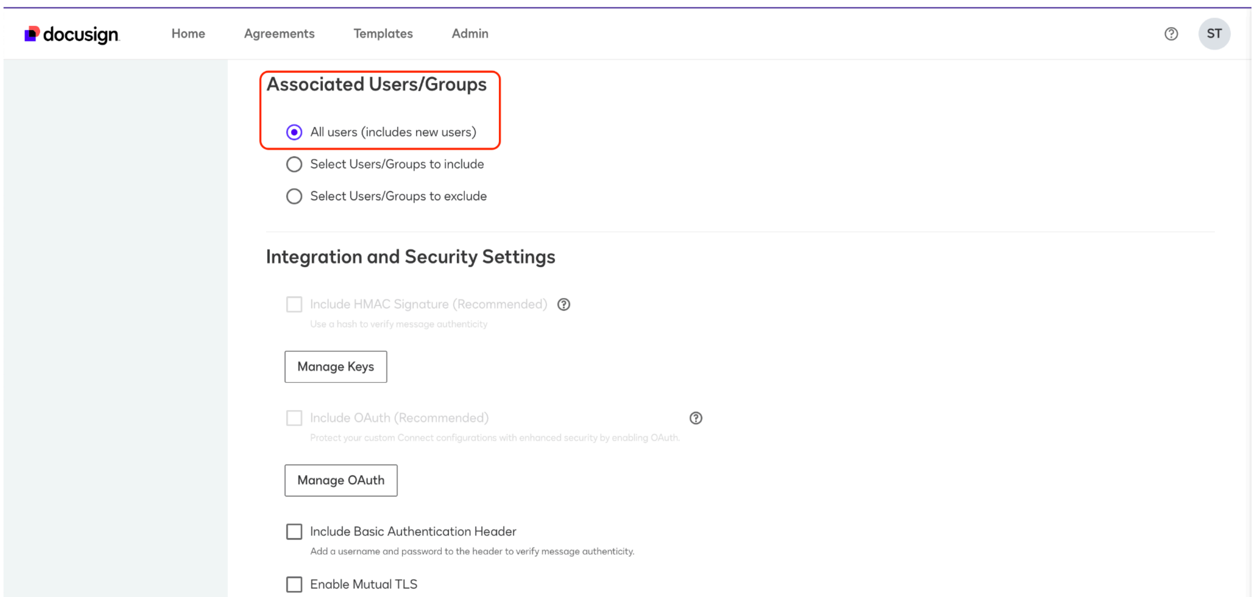
6. Under the “Envelope and Recipients" section, check all the options



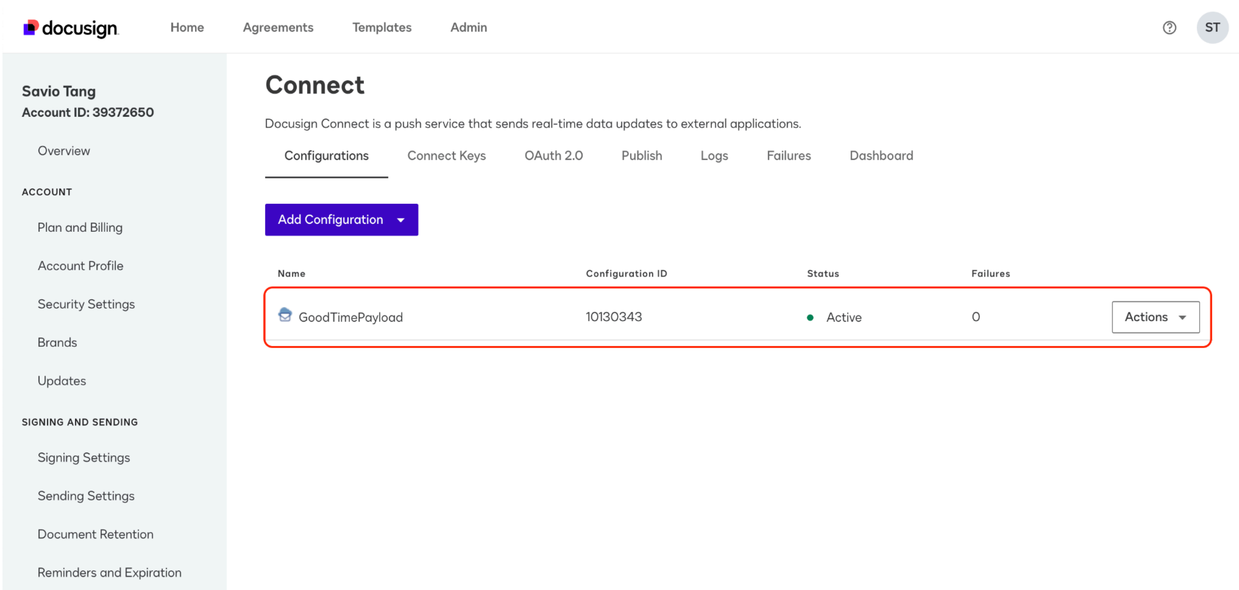
7. Under the “Include Data” section, make sure to check “Custom Fields”, “Powerform” and “Recipients”



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:



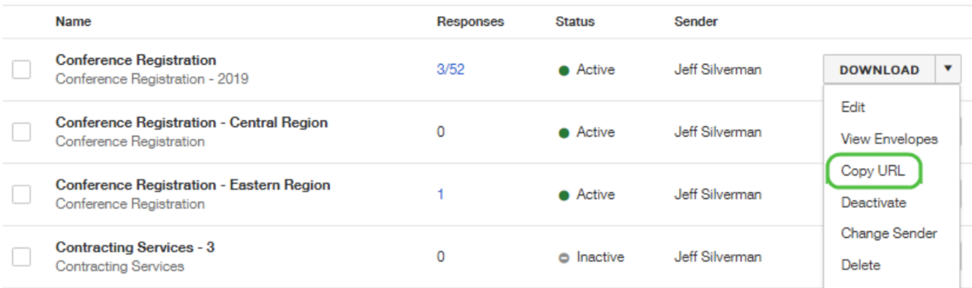
Insert a Docusign PowerForm URL in GoodTime

1. In Docusign:

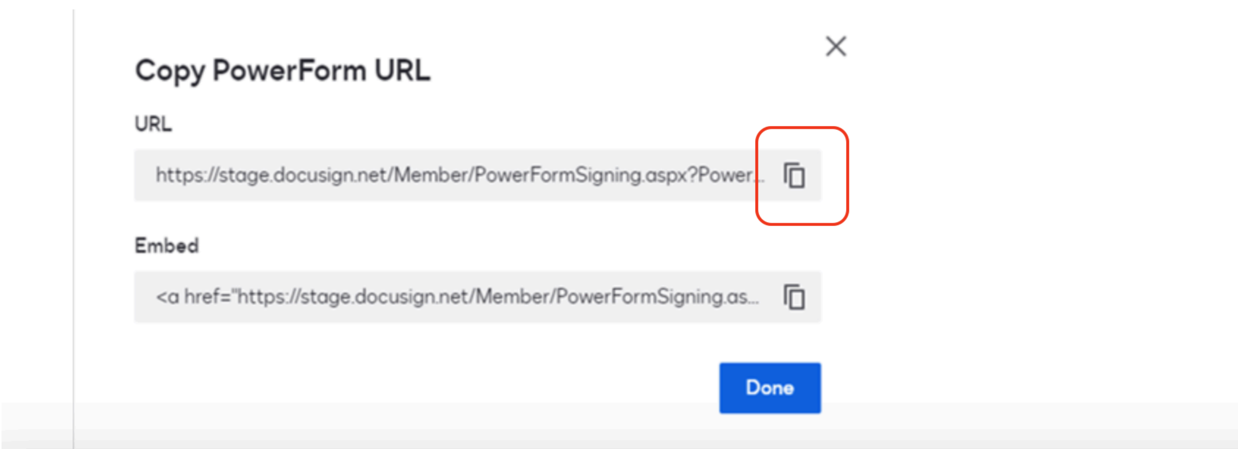
1. On the **Agreements** tab, select the **PowerForms** folder on the left panel to display all of your PowerForms.

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**.

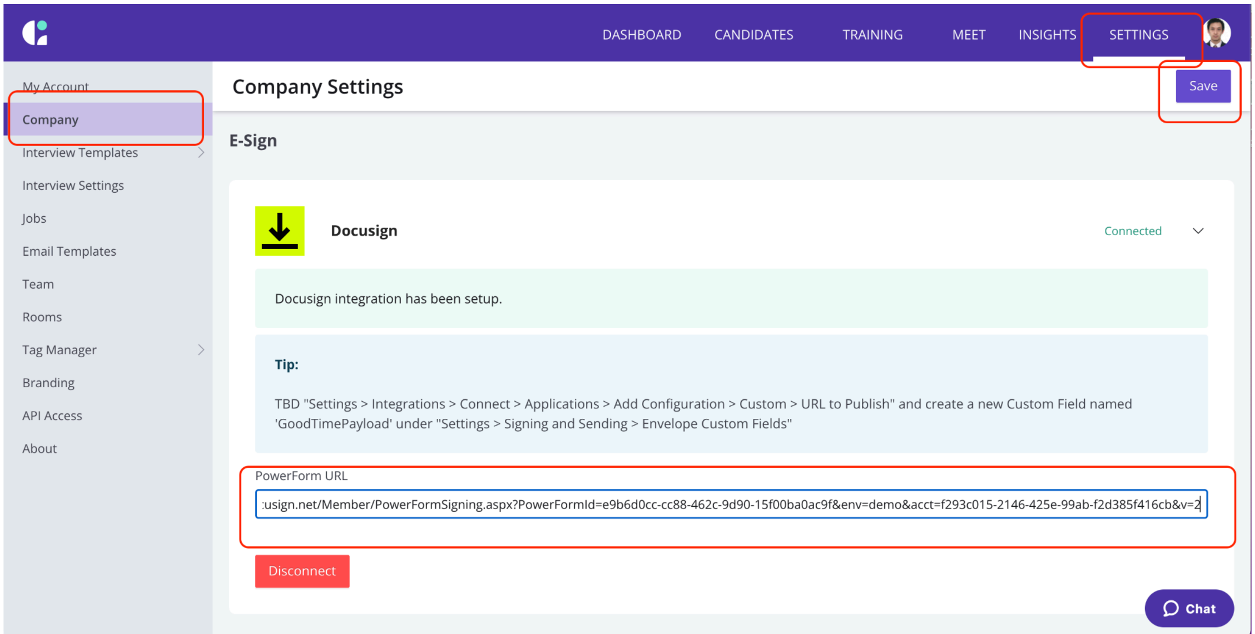


4. Select one of the tabs in the PowerForm URL dialog box and select **COPY**.
   - **URL LINK**: A link to the PowerForm landing page. Then paste the link into a browser or other location to use or record.
   - **EMBED CODE**: An HTML <a> tag specifying a hyperlink with an href attribute. This tag indicates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

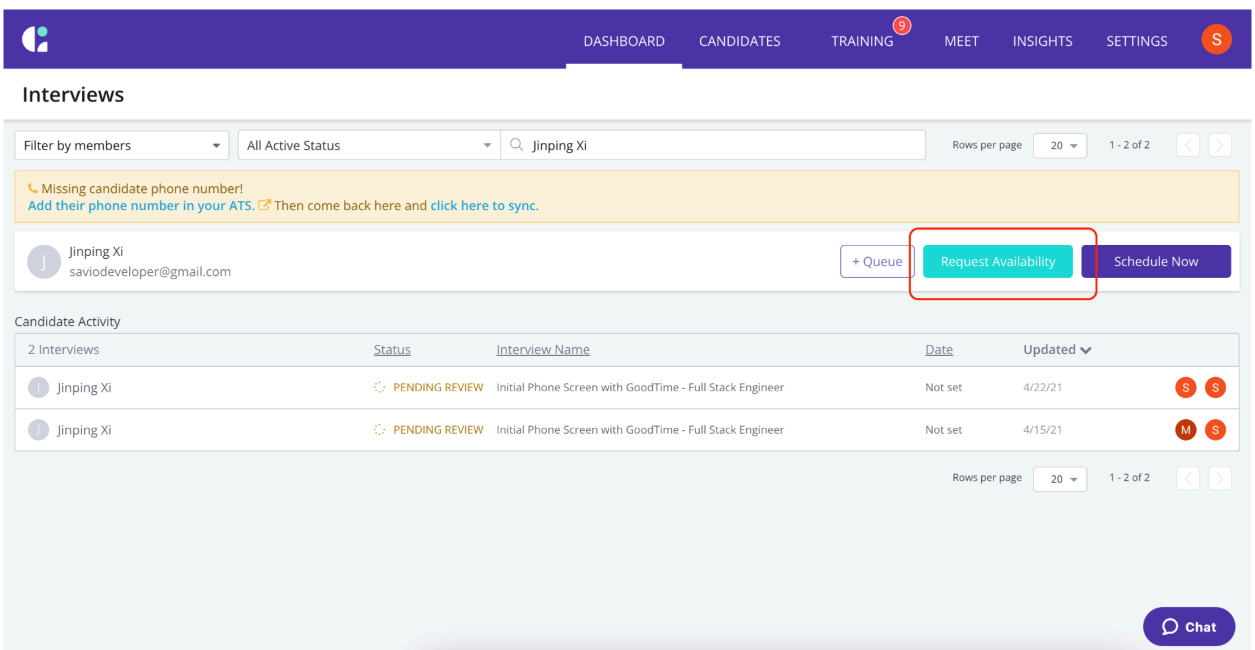


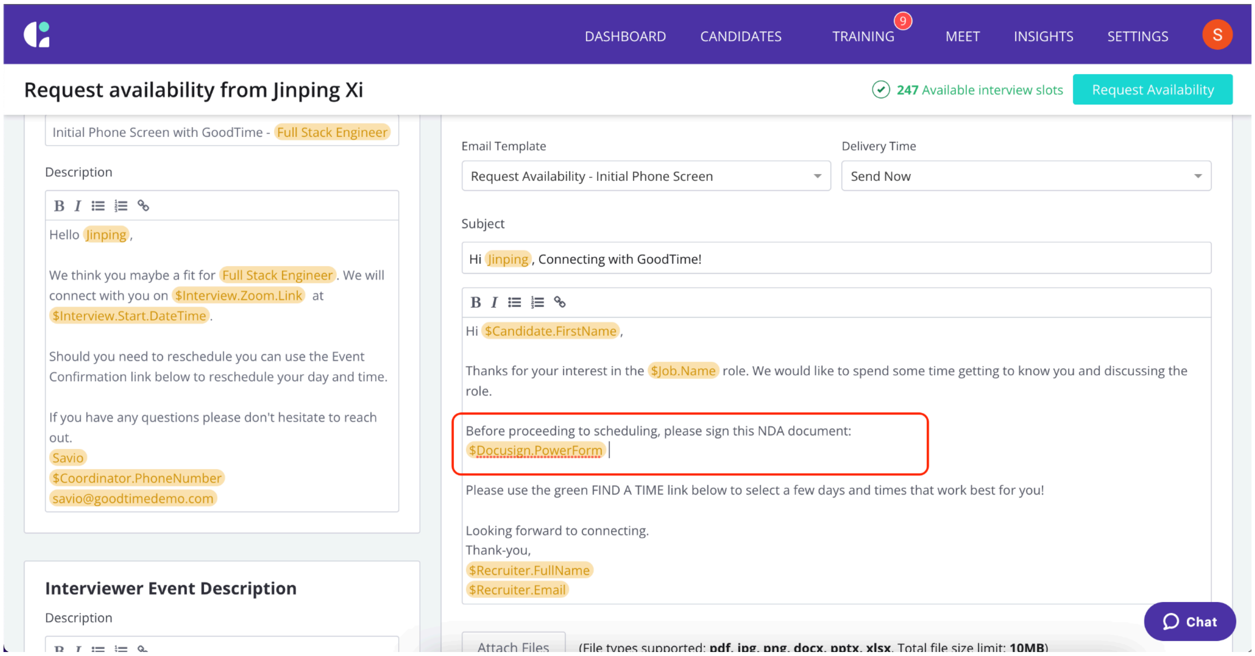
2. Remember to use the copy button on the right side:
   *** URL must be in raw format - if the user drag the mouse over URL to copy the value, it might get truncated and integration wouldn't work as expected ***

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.

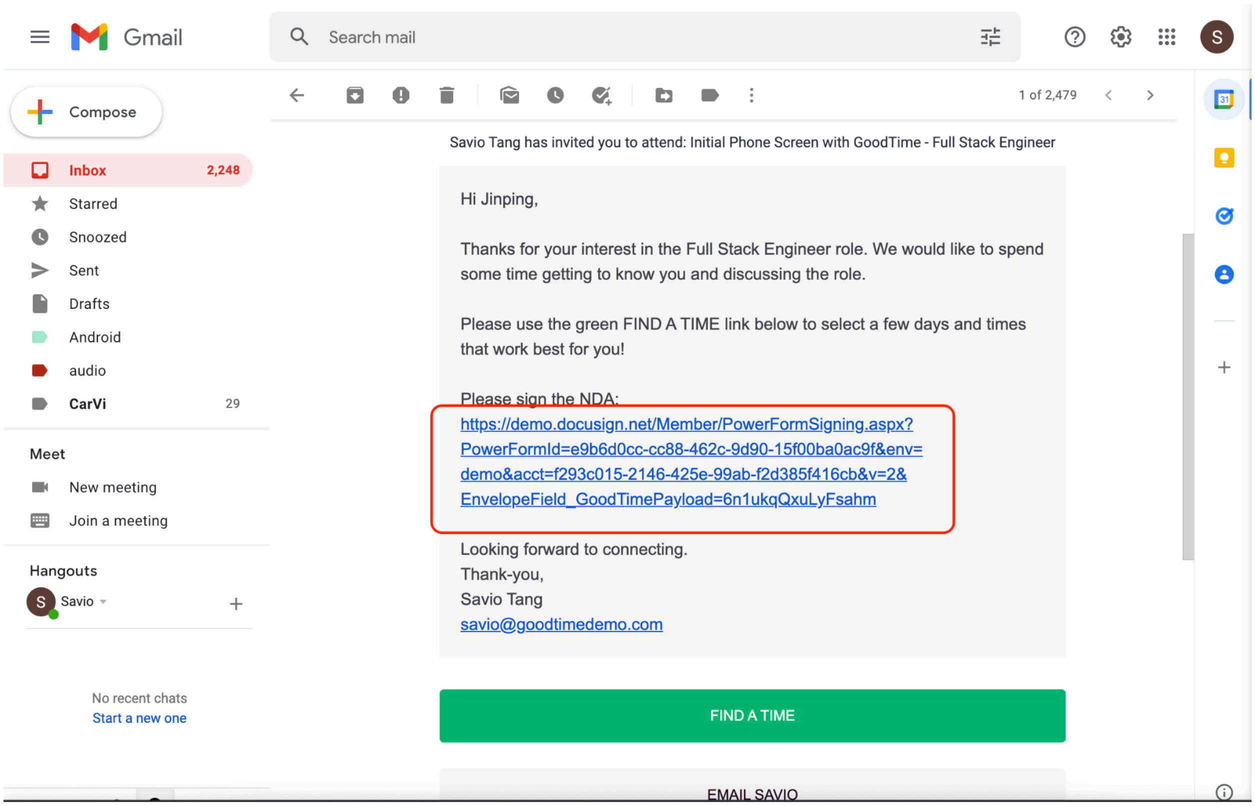


4. In GoodTime's "Request Availability" or "Schedule Now" workflow a user can insert a variable token "`$Docusign.PowerForm`" into the Email body text area. The variable token, when resolved, will pass interview information between GoodTime and Docusign. The following screenshot shows how to use the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

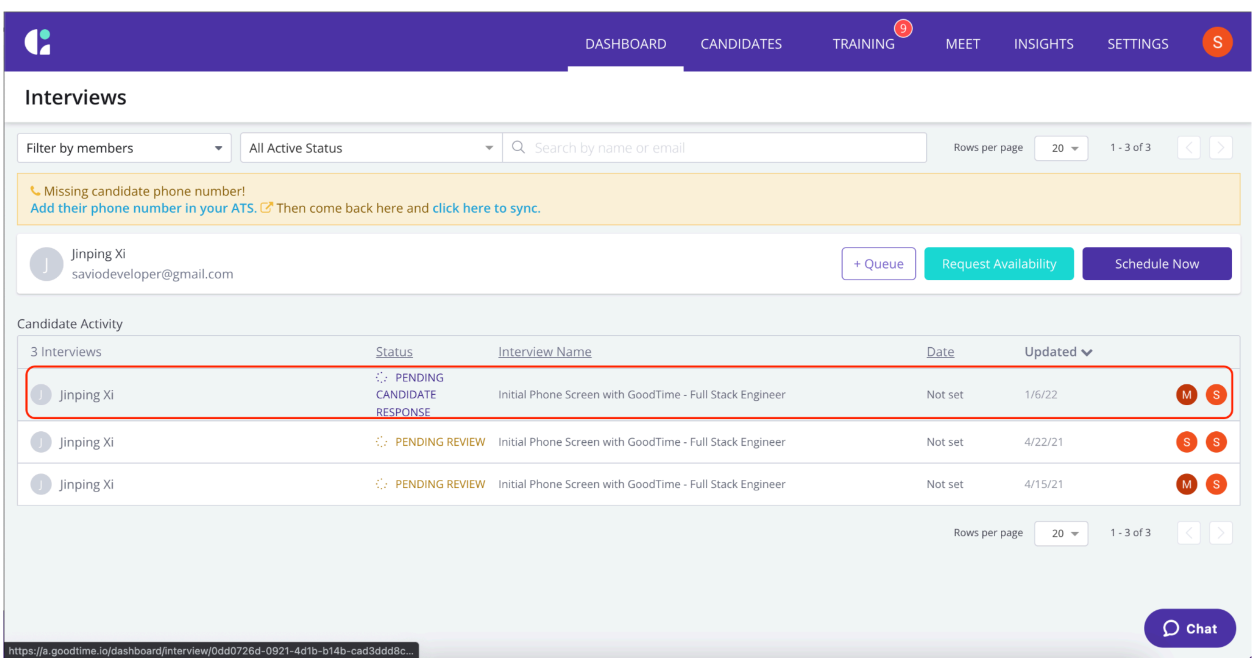




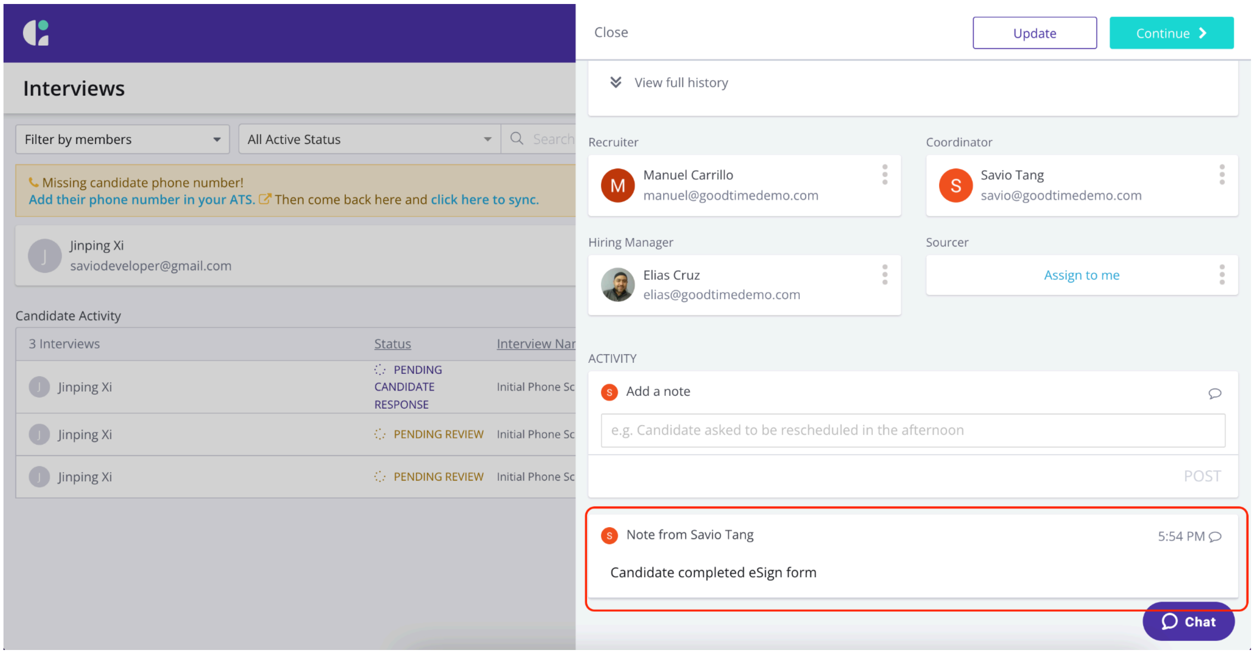
When the candidate receives the email, the variable token will be resolved into the Docusign PowerForm URL:



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:



Notes:

Variables supported are:

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