Docusign + GoodTime Integration

Updated Mar 24, 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)

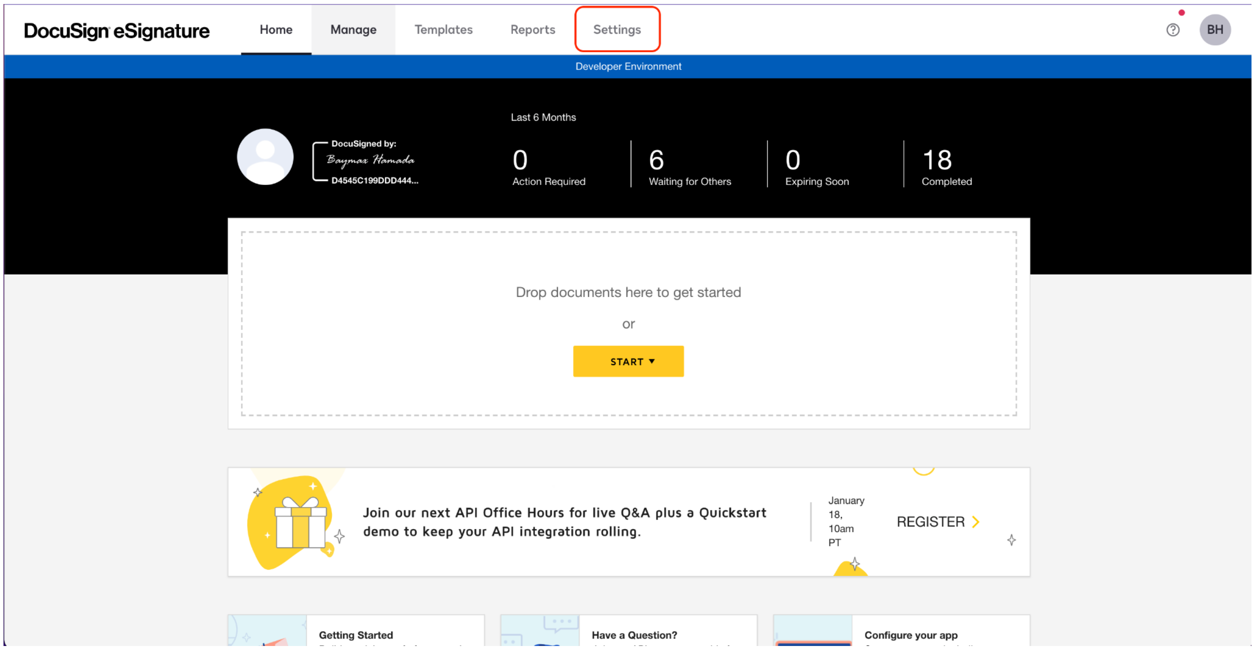
In this guide, you will learn how to:

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

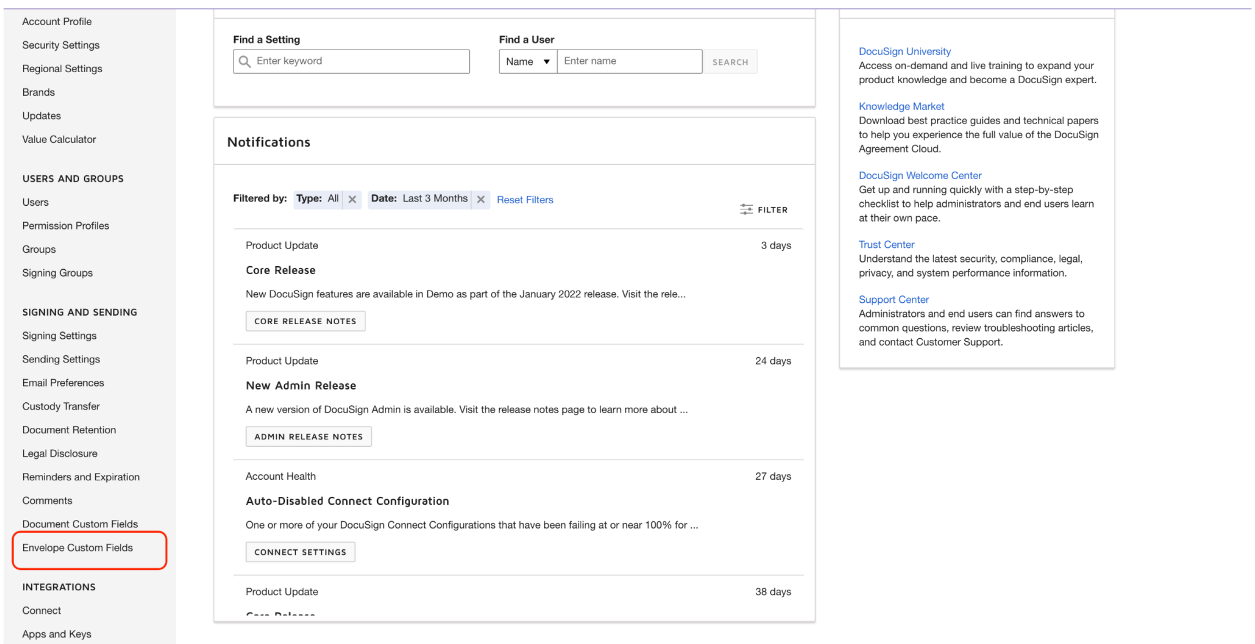
Set up Docusign <> GoodTime integration

Section A: Setting up Custom Fields

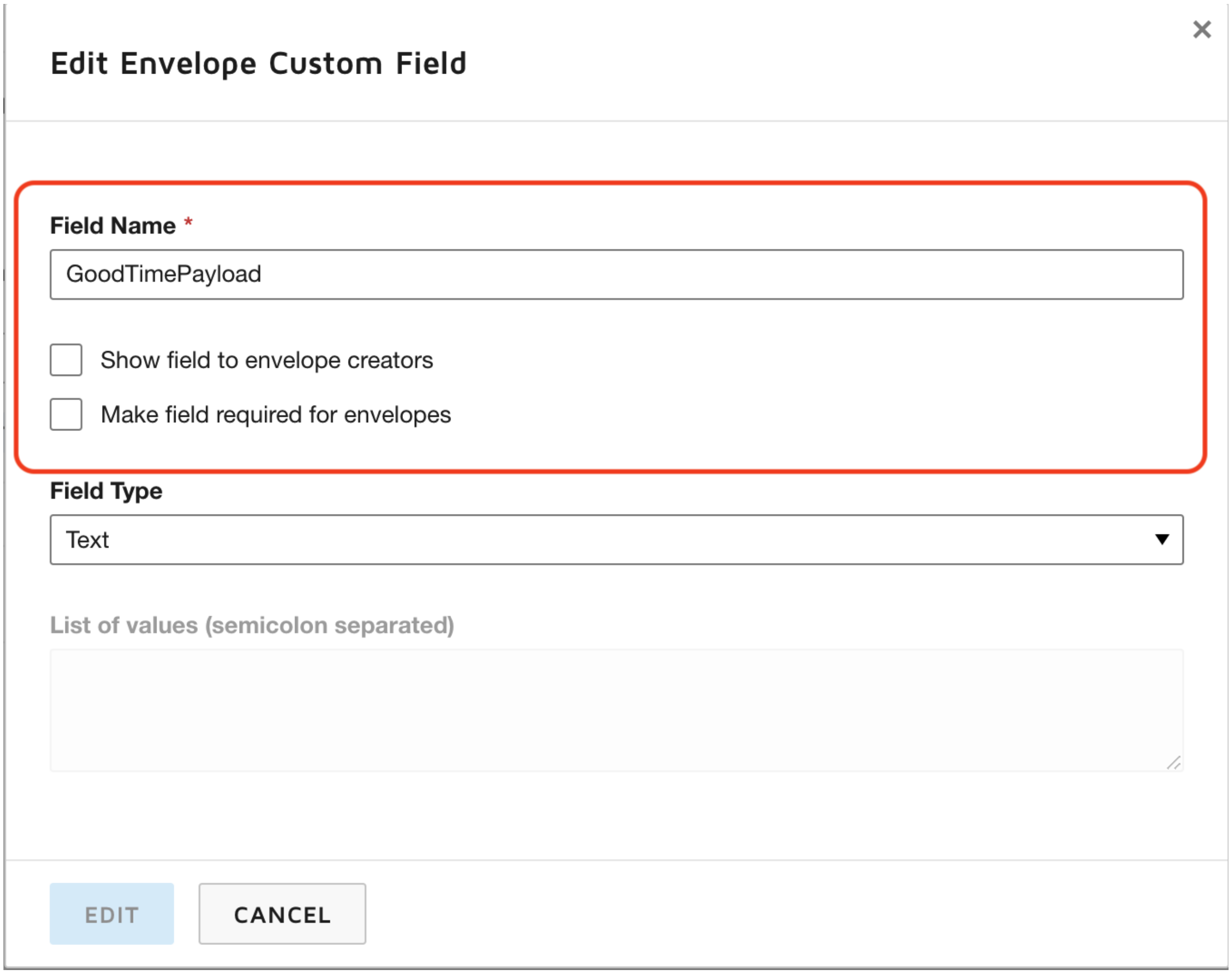
1. From your Docusign Home, Go to "Settings"



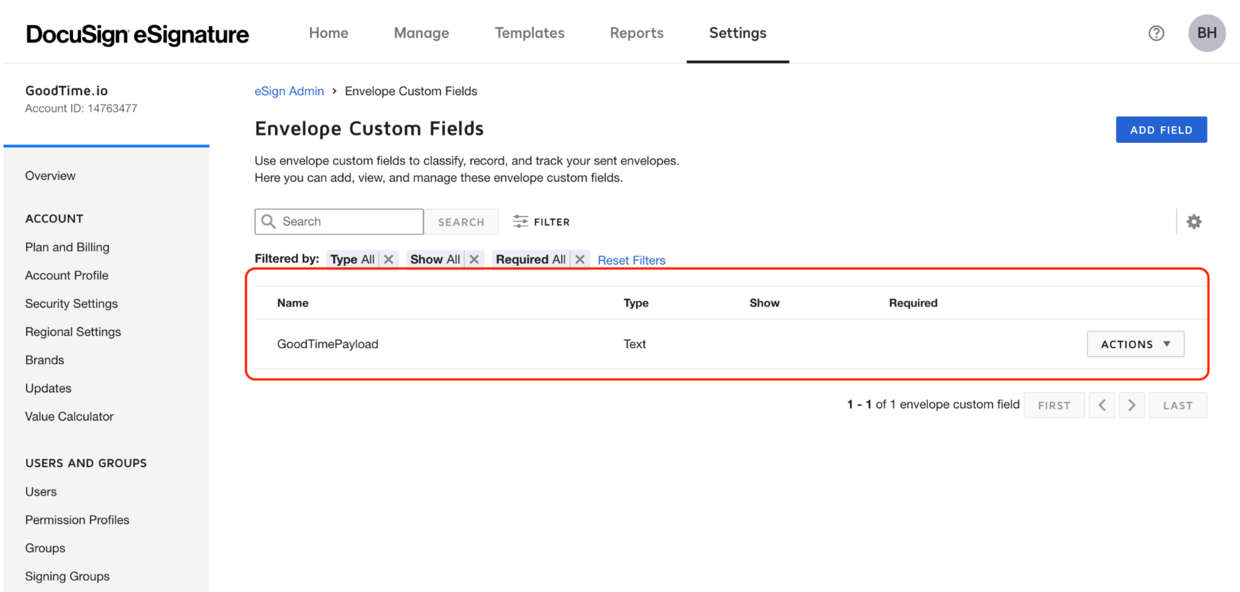
2. Then scroll down and find “Envelope Custom Fields” on the left-side-pane.



3. Click “Add Field”. A dialog box will pop-up. Input the Field Name as “GoodTimePayload” (Note: This name has to be exact, any typo or miss-spellings will not work) Set “Field Type” to Text. Finally click “Add” to finish this step.

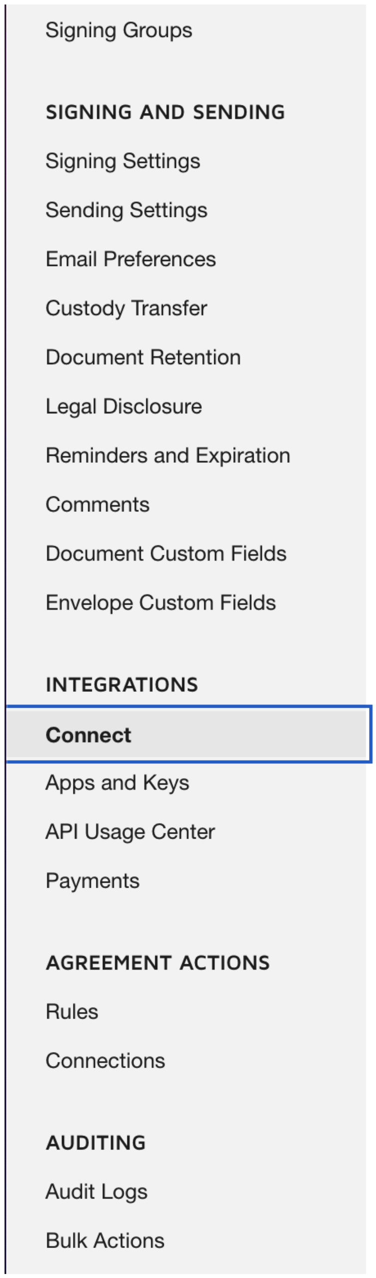


4. Double check if you performed the above step correctly. The result should look like this:

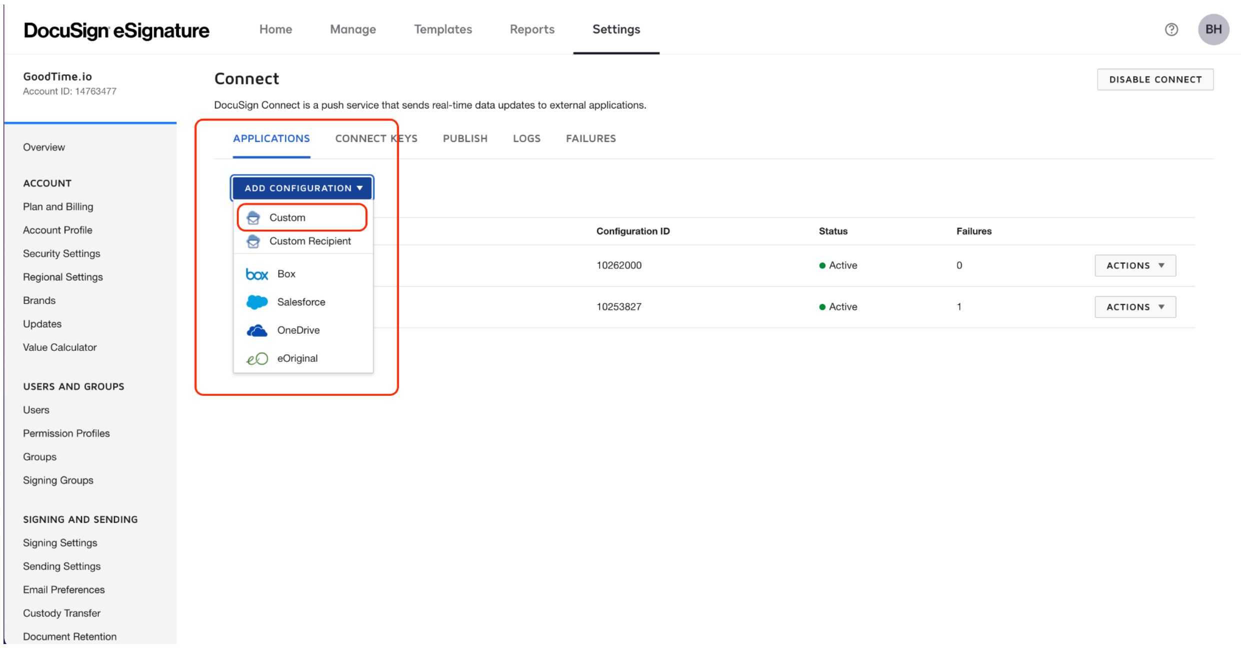


Section B: Setting up the Docusign-to-GoodTime Connect Configuration

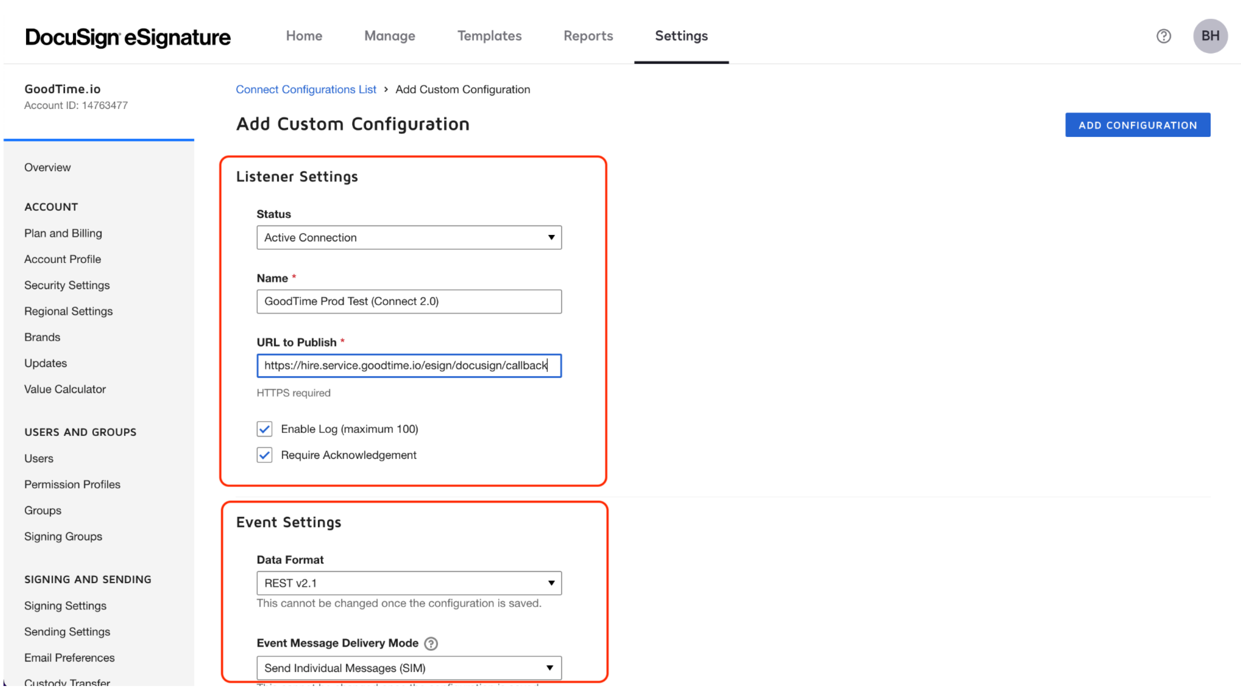
1. On the left-side-pane, navigate to and click on “INTEGRATIONS” -> “Connect”



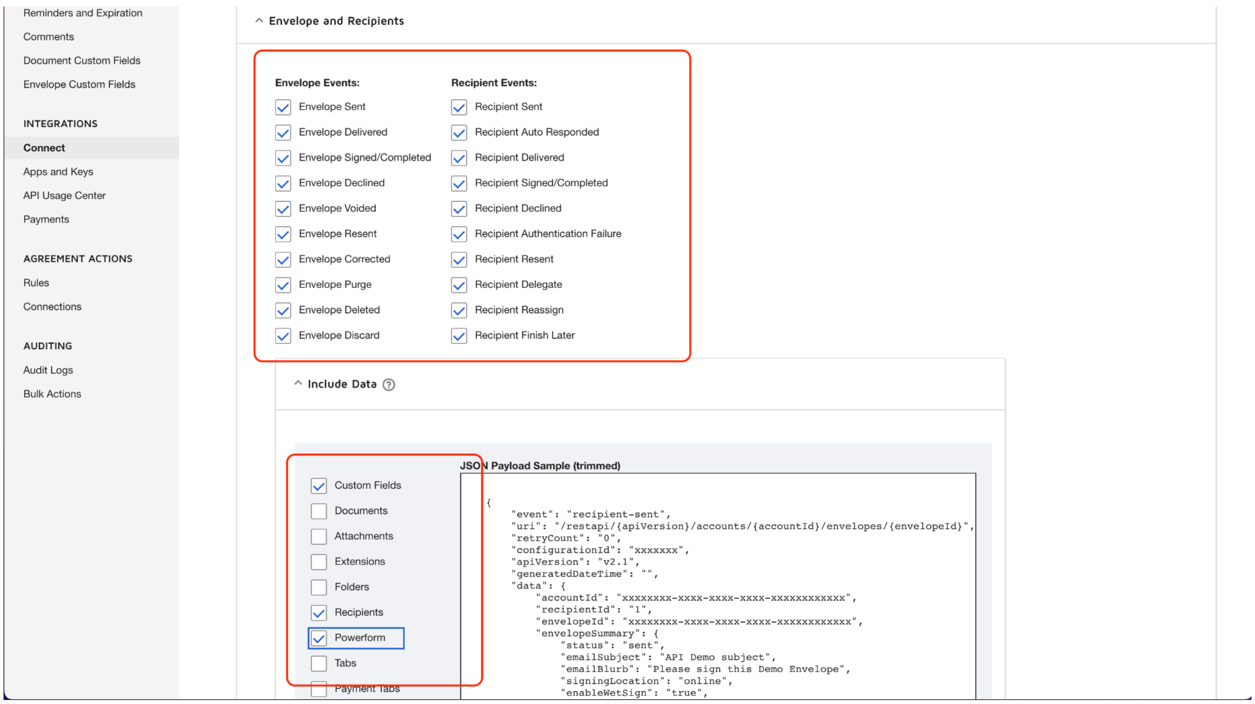
2. Under “APPLICATIONS”, Click “ADD CONFIGURATION” and “Custom”



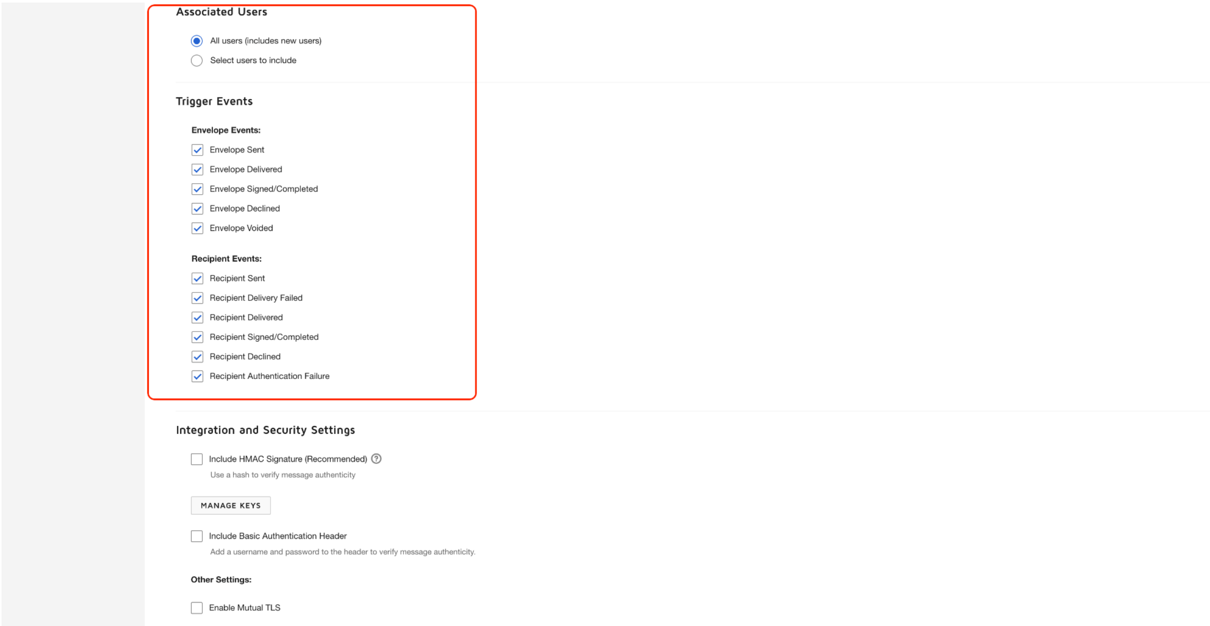
3. Under the "System Settings" options. Status should be "Active Connection", give this connection a descriptive name. The URL to Publish should be: https://hire.service.goodtime.io/esign/docusign/callback
Make sure to check both checkboxes "Enable Log…" and "Require Acknowledgement". Make sure Data Format is set to "REST v2.1" and Event Message Delivery Mode is set to "Send Individual Messages (SIM)



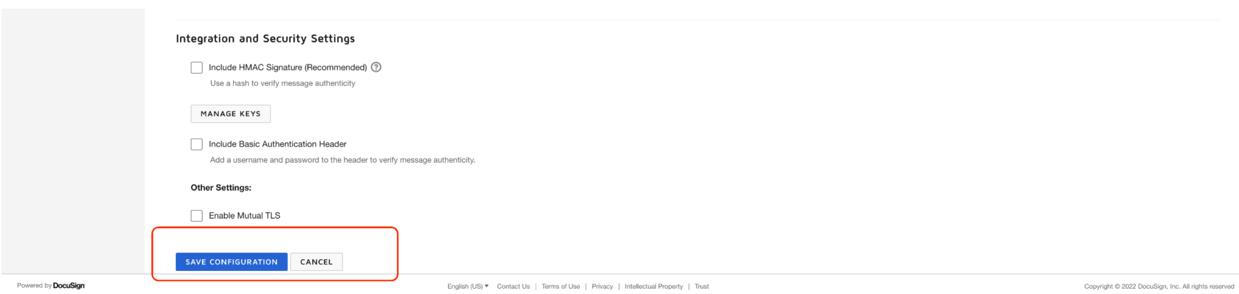
4. On the same screen scroll further down to expand “Envelope and Recipients” additional options below.
   Select all the checkboxes under “Envelop Events” and “Recipient Events”.
   Under “Include Data”, please select “Custom Fields”, “Recipients” and “Powerform”



5. On the same screen scroll further down.
   Under “Associated Users”, please select “All users”.;
   Under “Trigger Events”, select all the available options.

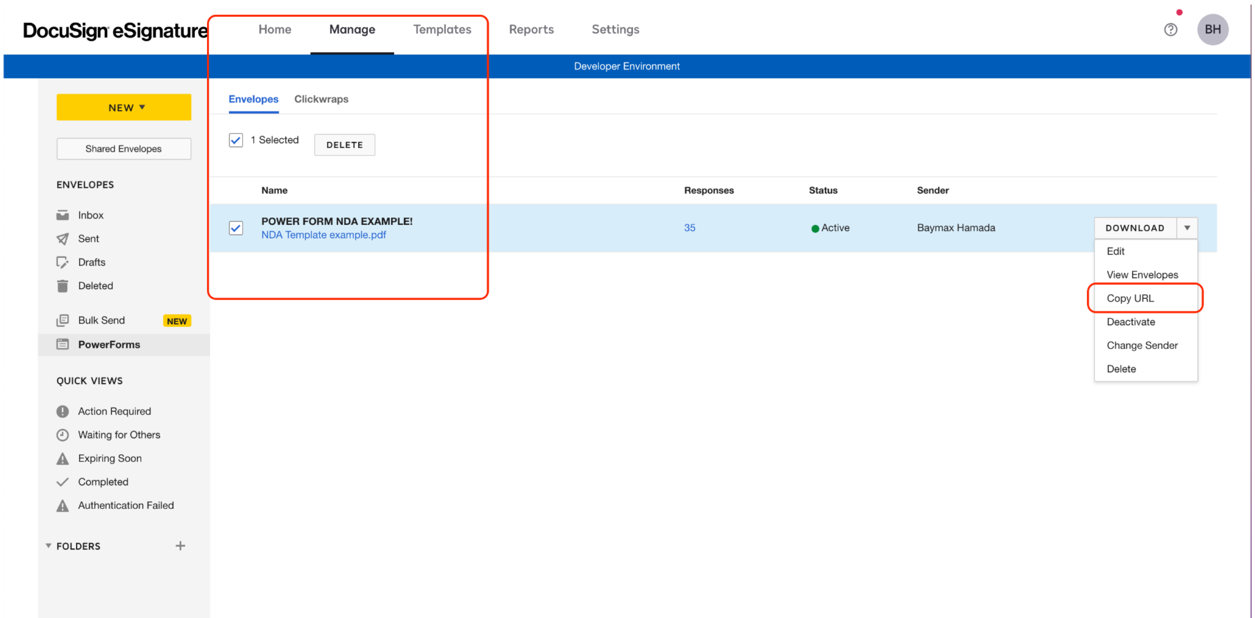


6. Remember to click “Save Configuration” at the very bottom of the page.

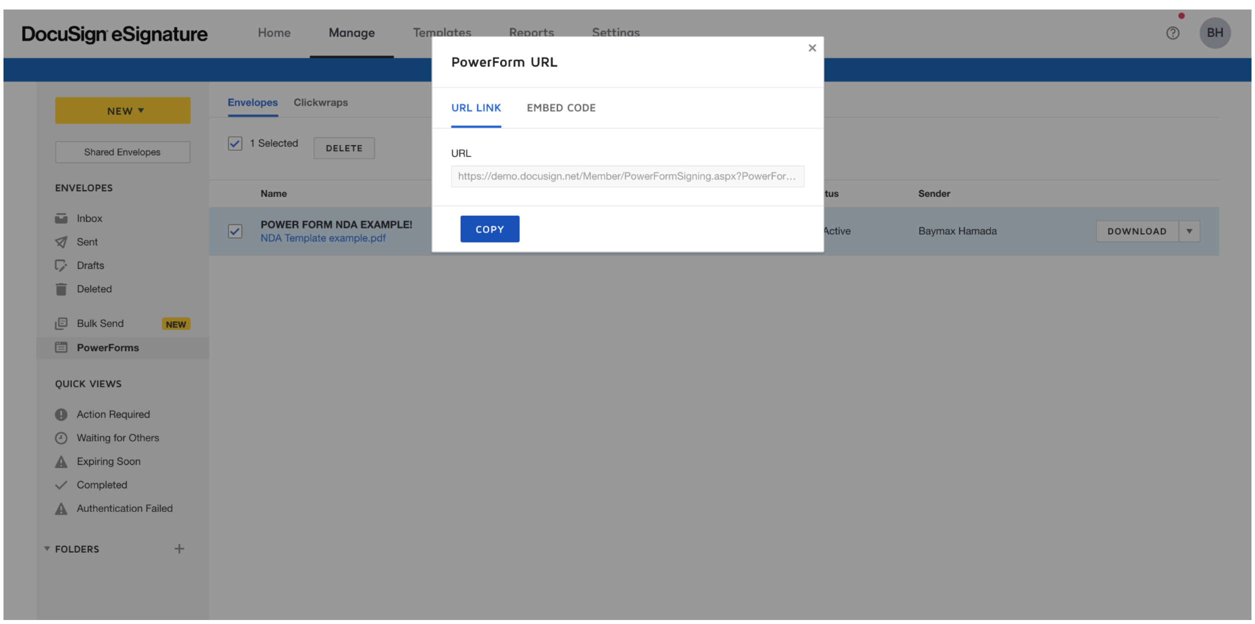


Insert a Docusign PowerForm URL in GoodTime

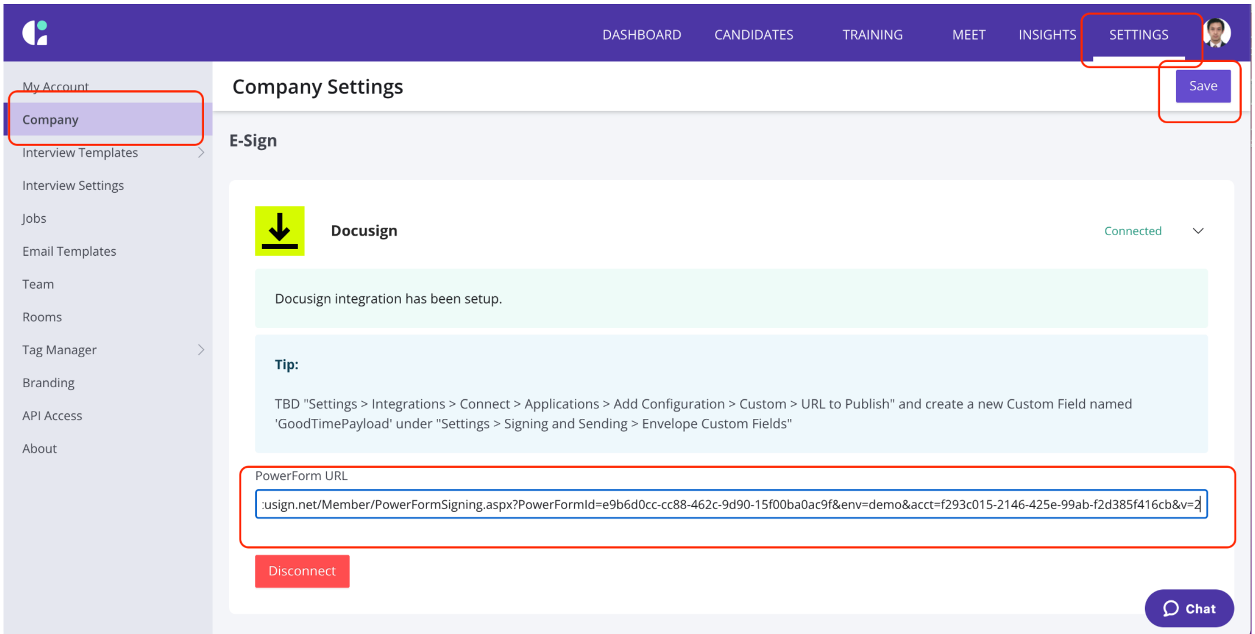
1. In Docusign, under the “Manage” tab on top, navigate to “PowerForms” on the left-side-pane, find the PowerForm (example: NDA) you wish to insert into GoodTime, and on the right side drop-down, select “Copy URL”.



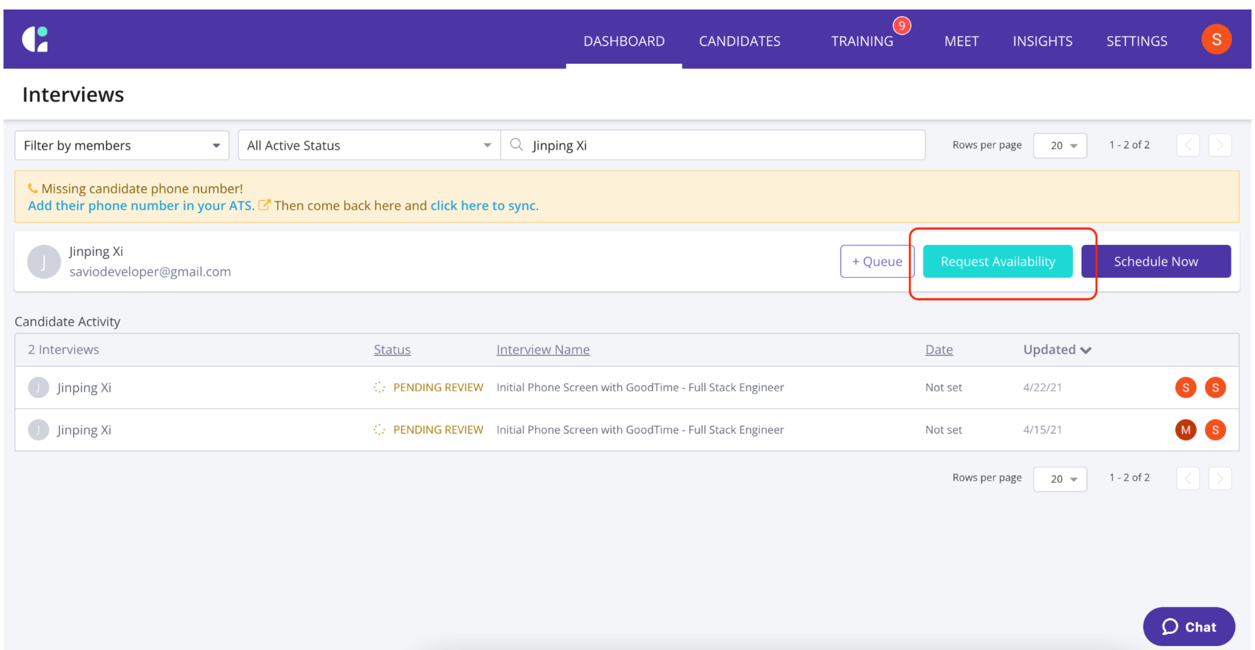
2. A dialog box will pop up, click “Copy” under the “URL LINK”
*** URL must be in raw format - if the user drag the mouse over URL to copy the value, it might get truncated and integration wouldn’t work as expected ***

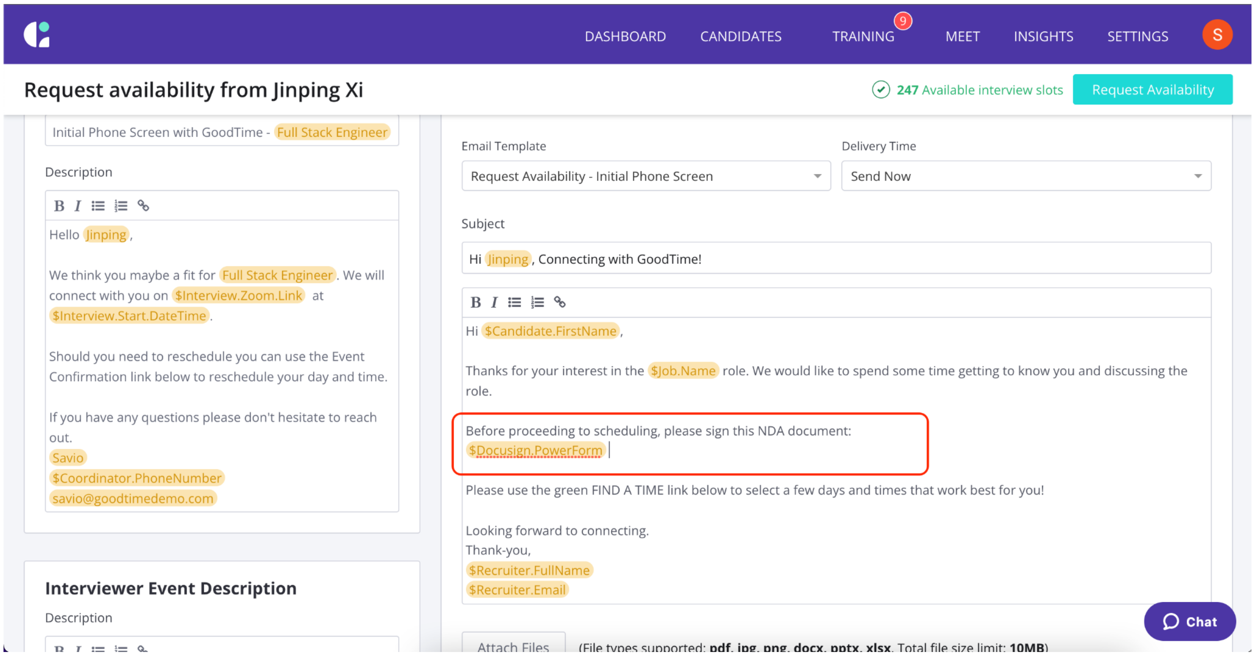


3. Inside GoodTime, under “Settings”, select “Company” on the left-side-pane, scroll down to the “E-sign” section. You should see the “Docusign” section. Paste the URL from the previous step into the box and remember to click “Save” on top.

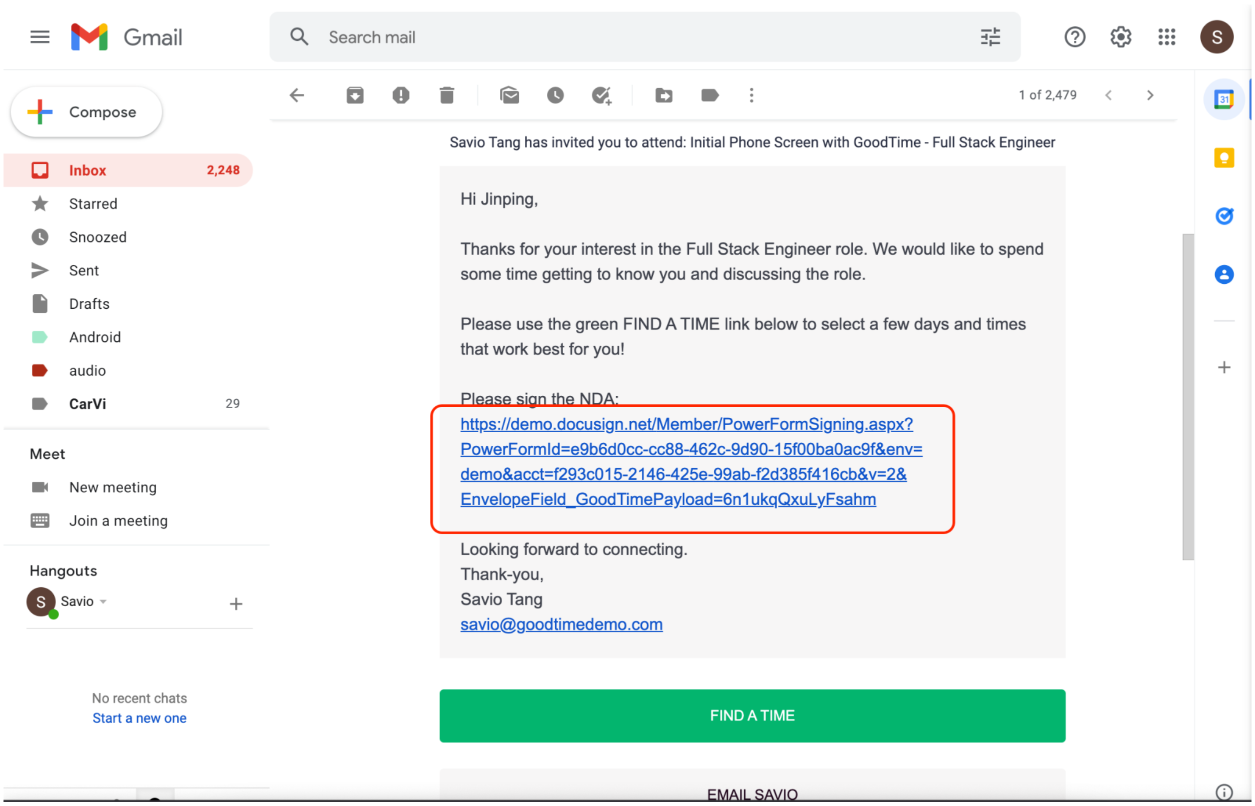


4. In GoodTime's "Request Availability" or "Schedule Now" workflow a user can insert a variable token "`$Docusign.PowerForm`" into the Email body text area. The variable token, when resolved, will pass interview information between GoodTime and Docusign. The following screenshot shows how to use the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

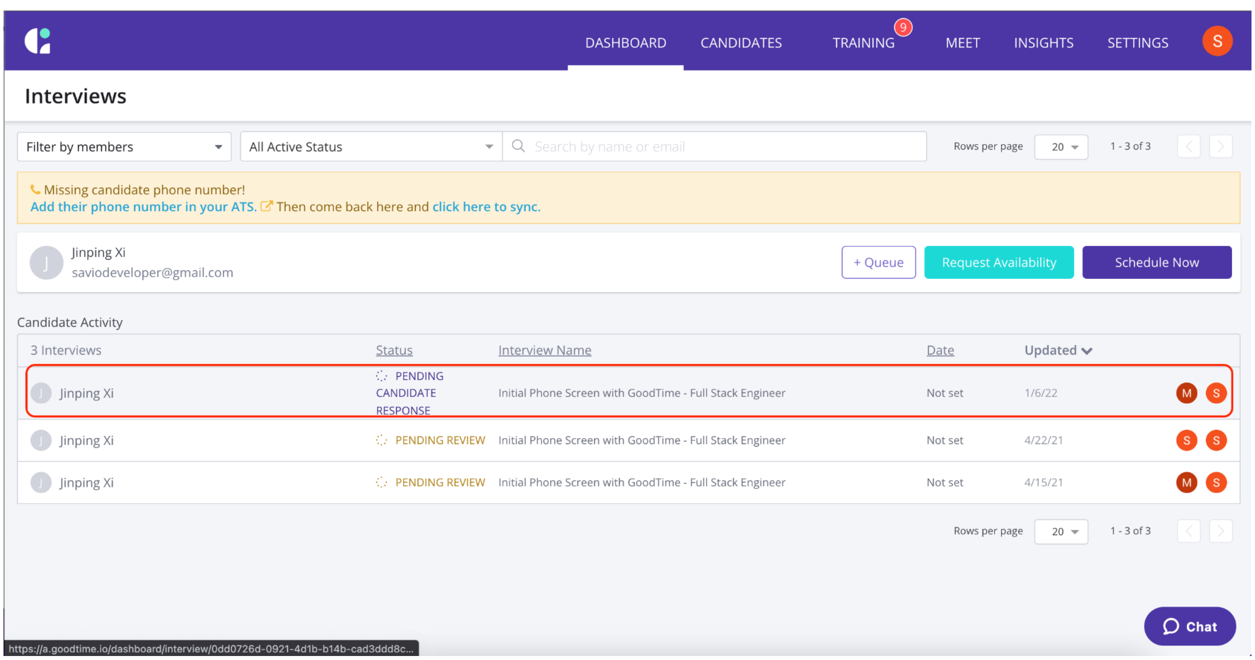




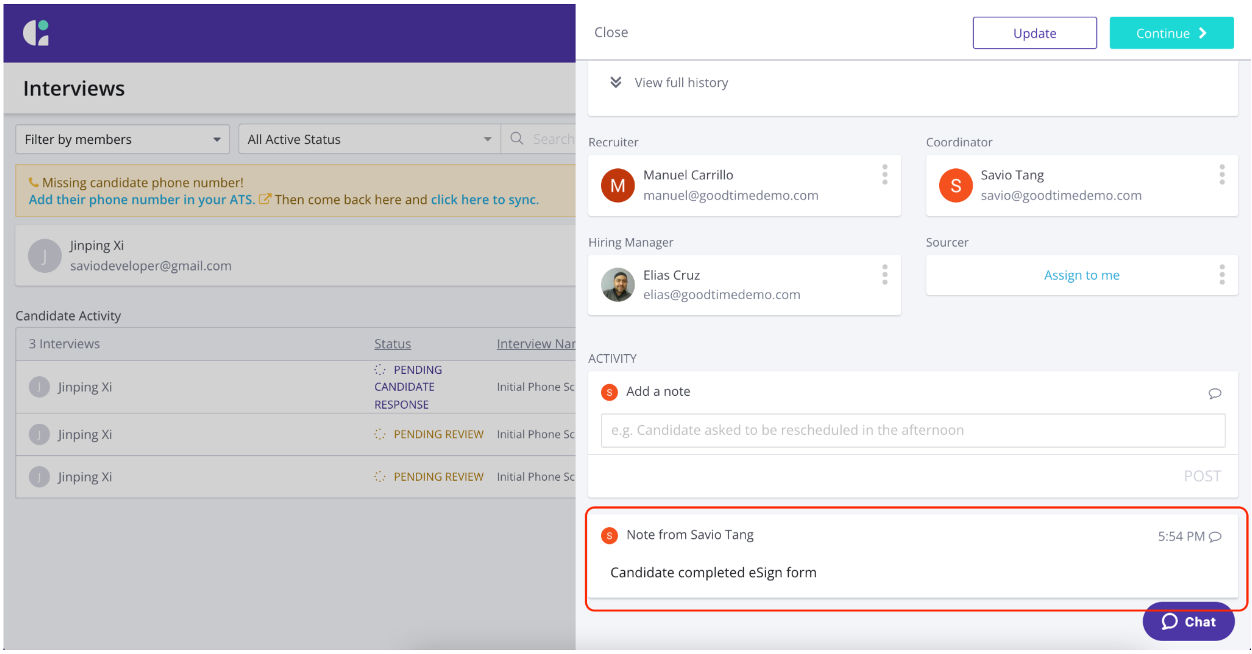
When the candidate receives the email, the variable token will be resolved into the Docusign PowerForm URL:



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