

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)

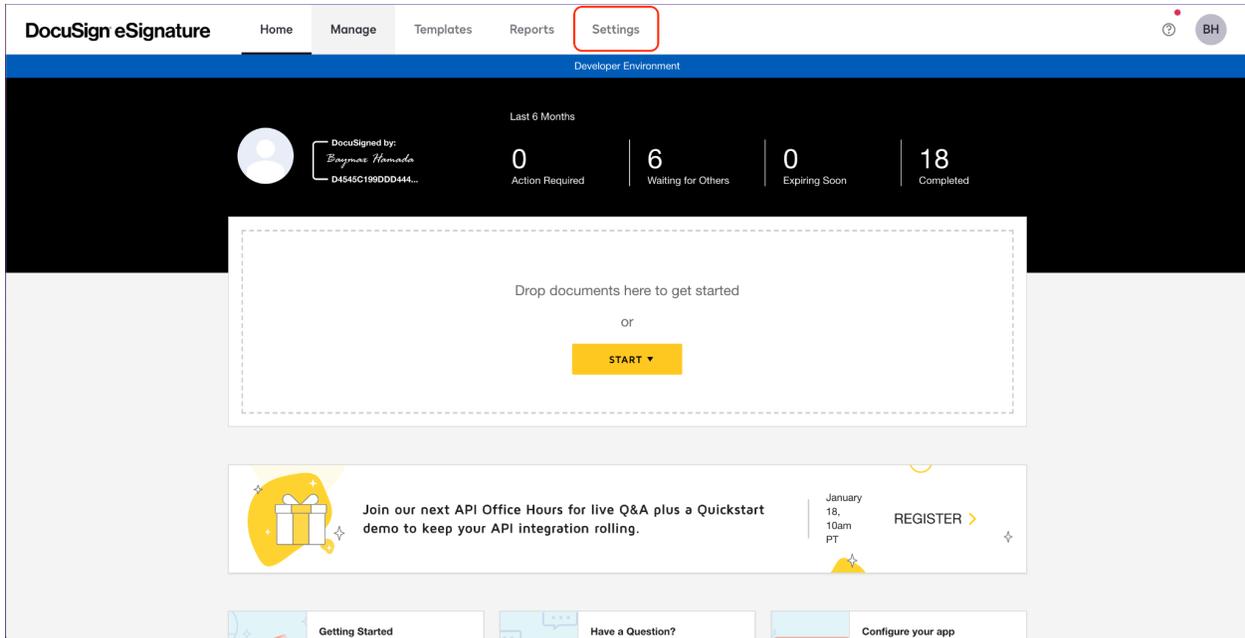
In this guide, you will learn how to:

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

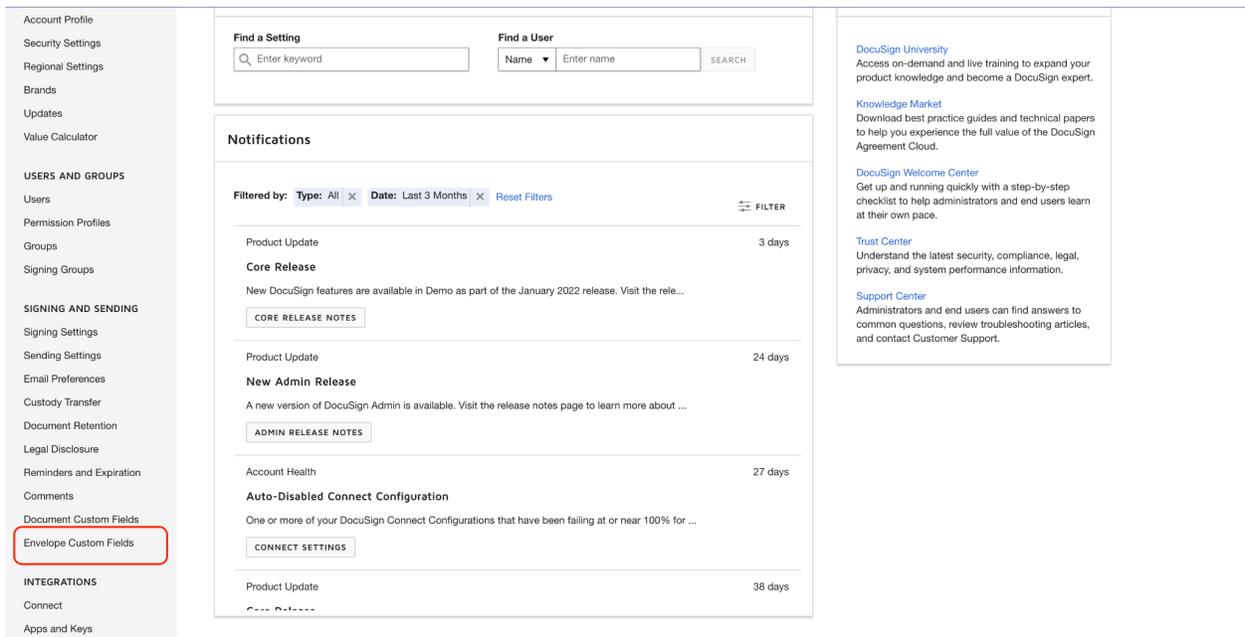
Set up DocuSign <> GoodTime integration

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.

✕

Edit Envelope Custom Field

Field Name *

Show field to envelope creators

Make field required for envelopes

Field Type

Text
▼

List of values (semicolon separated)

EDIT

CANCEL

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

DocuSign eSignature
Home Manage Templates Reports **Settings**
? BH

GoodTime.io
Account ID: 14763477

- Overview
- ACCOUNT**
- Plan and Billing
- Account Profile
- Security Settings
- Regional Settings
- Brands
- Updates
- Value Calculator
- USERS AND GROUPS**
- Users
- Permission Profiles
- Groups
- Signing Groups

eSign Admin > Envelope Custom Fields

Envelope Custom Fields

Use envelope custom fields to classify, record, and track your sent envelopes. Here you can add, view, and manage these envelope custom fields.

SEARCH
FILTER
⚙️

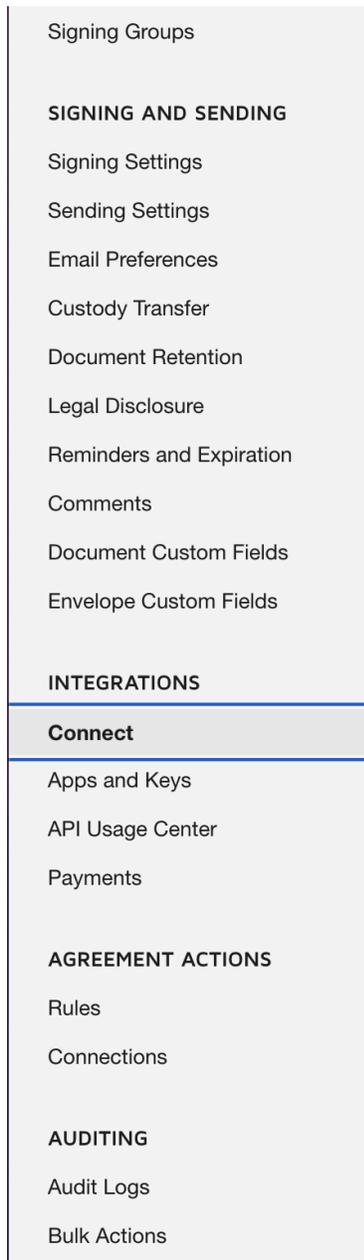
Filtered by: Type All Show All Required All Reset Filters

Name	Type	Show	Required	ACTIONS
GoodTimePayload	Text			ACTIONS ▼

1 - 1 of 1 envelope custom field FIRST < > LAST

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”

DocuSign eSignature Home Manage Templates Reports Settings

GoodTime.io Account ID: 14763477

Connect DISABLE CONNECT

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

APPLICATIONS CONNECT KEYS PUBLISH LOGS FAILURES

ADD CONFIGURATION

- Custom
- Custom Recipient
- Box
- Salesforce
- OneDrive
- eOriginal

Configuration ID	Status	Failures	ACTIONS
10262000	Active	0	ACTIONS
10253827	Active	1	ACTIONS

- 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)"

DocuSign eSignature Home Manage Templates Reports Settings

GoodTime.io Account ID: 14763477

Connect Configurations List > Add Custom Configuration ADD CONFIGURATION

Add Custom Configuration

Listener Settings

Status: Active Connection

Name: GoodTime Prod Test (Connect 2.0)

URL to Publish: [https://hire.service.goodtime.io/esign/callback](https://hire.service.goodtime.io/esign/docusign/callback)

HTTPS required

Enable Log (maximum 100)

Require Acknowledgement

Event Settings

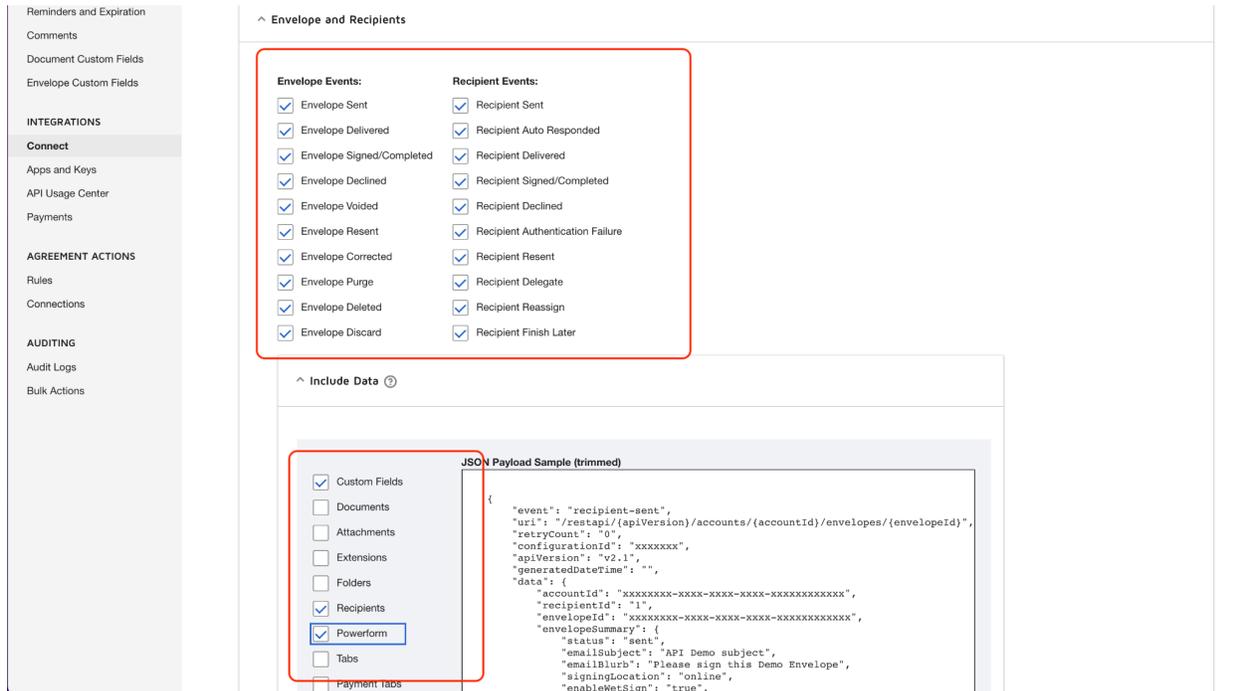
Data Format: REST v2.1
This cannot be changed once the configuration is saved.

Event Message Delivery Mode: 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 “Envelope 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.

Associated Users

All users (includes new users)
 Select users to include

Trigger Events

Envelope Events:

- Envelope Sent
- Envelope Delivered
- Envelope Signed/Completed
- Envelope Declined
- Envelope Voided

Recipient Events:

- Recipient Sent
- Recipient Delivery Failed
- Recipient Delivered
- Recipient Signed/Completed
- Recipient Declined
- Recipient Authentication Failure

Integration and Security Settings

Include HMAC Signature (Recommended) ⓘ
Use a hash to verify message authenticity

MANAGE KEYS

Include Basic Authentication Header
Add a username and password to the header to verify message authenticity.

Other Settings:

Enable Mutual TLS

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

Integration and Security Settings

Include HMAC Signature (Recommended) ⓘ
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Include Basic Authentication Header
Add a username and password to the header to verify message authenticity.

Other Settings:

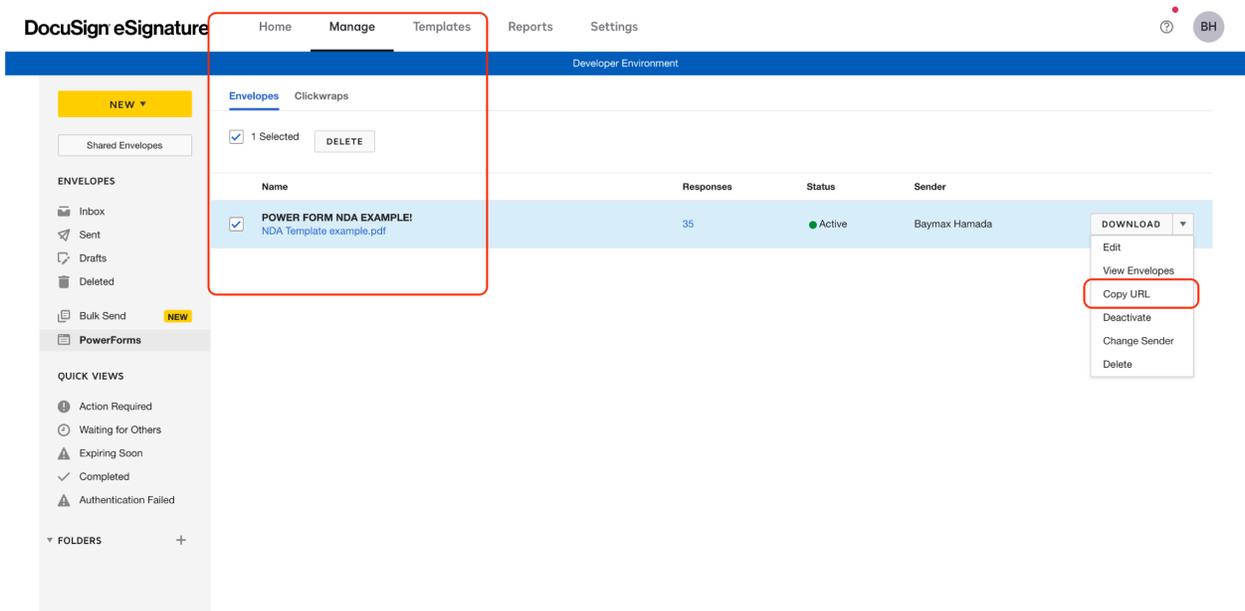
Enable Mutual TLS

SAVE CONFIGURATION **CANCEL**

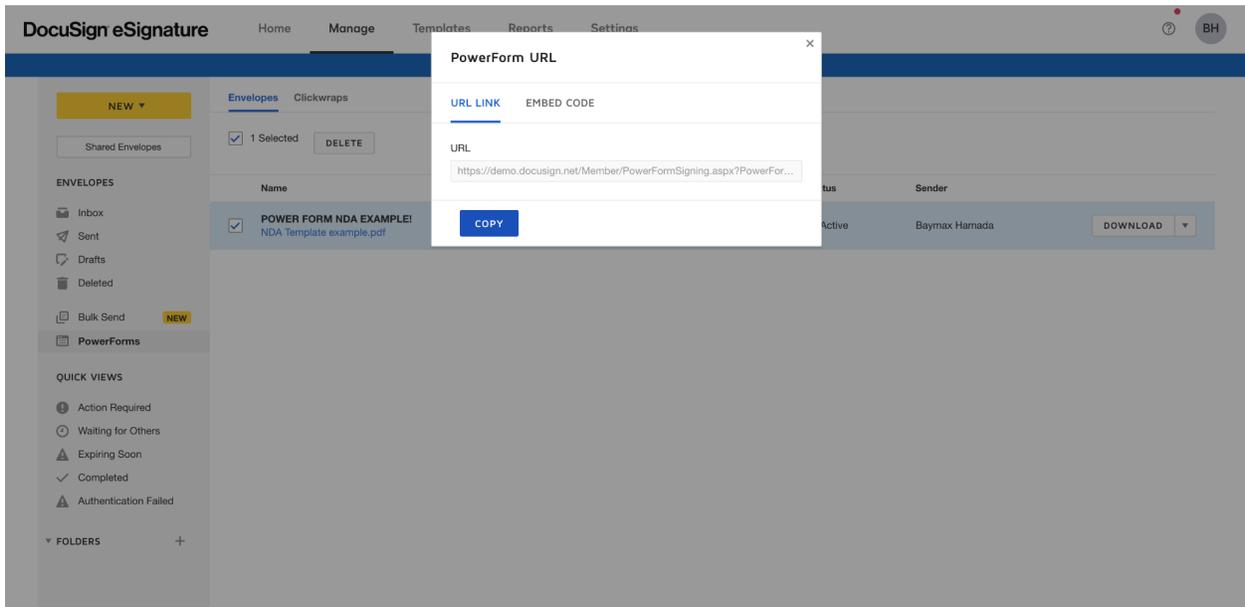
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Insert a DocuSign PowerForm URL in GoodTime

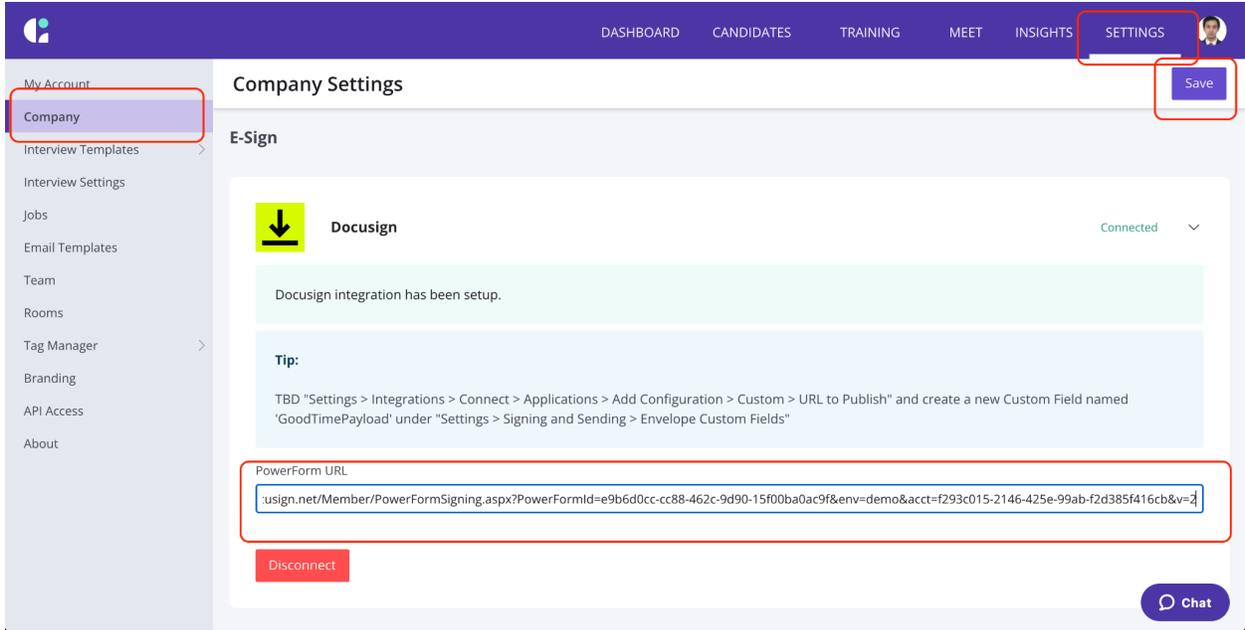
1. In DocuSign, under the “Manage” tab on top, navigate to “PowerForms” on the left-side-pane, find the PowerForm (example: NDA) you wish to insert into GoodTime, and on the right side drop-down, select “Copy URL”.



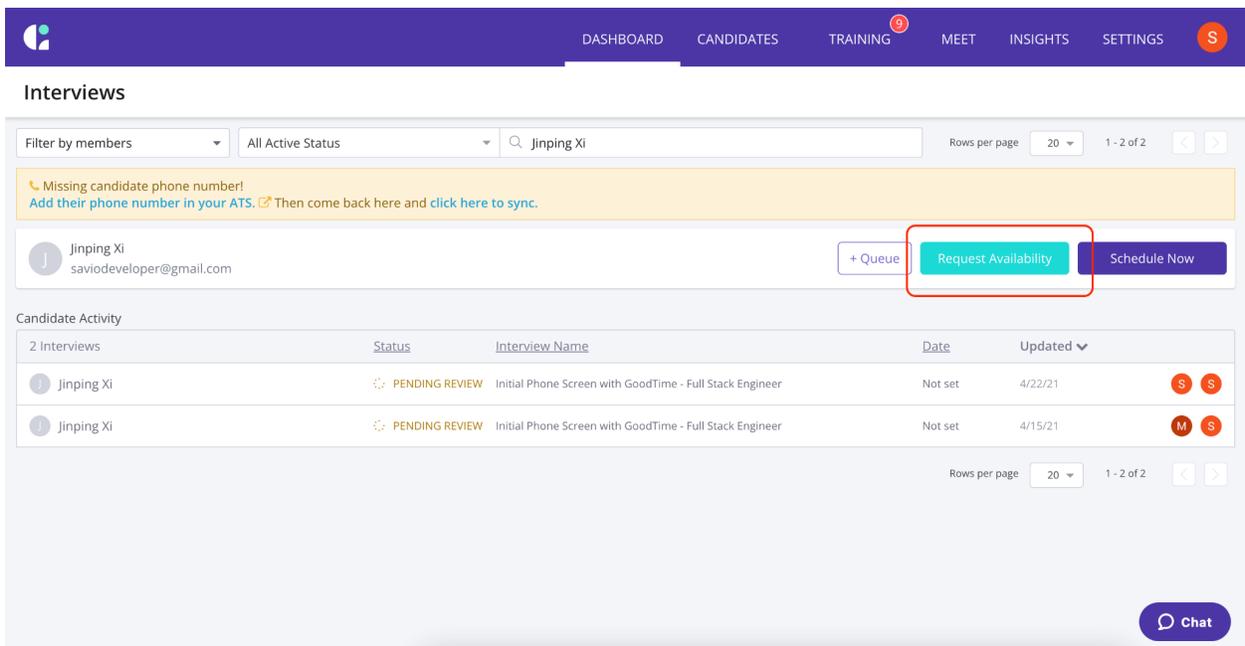
2. A dialog box will pop up, click “Copy” under the “URL LINK”
*** URL must be in raw format - if the user drag the mouse over URL to copy the value, it might get truncated and integration wouldn’t work as expected ***



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.



- 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:

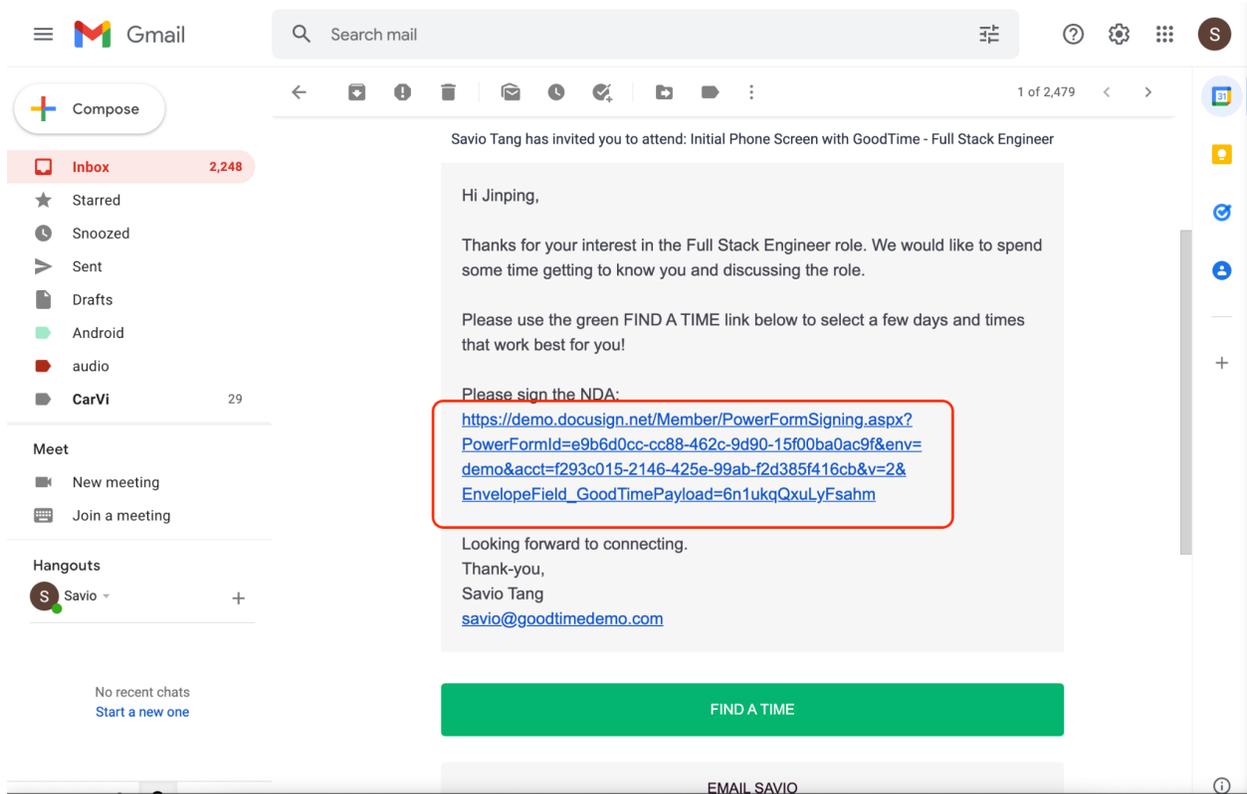


The screenshot shows a recruitment dashboard with a purple header containing navigation links: DASHBOARD, CANDIDATES, TRAINING (with a notification badge), MEET, INSIGHTS, and SETTINGS (with a notification badge). The main content area is titled "Request availability from Jinping Xi" and includes a status indicator "247 Available interview slots" and a "Request Availability" button.

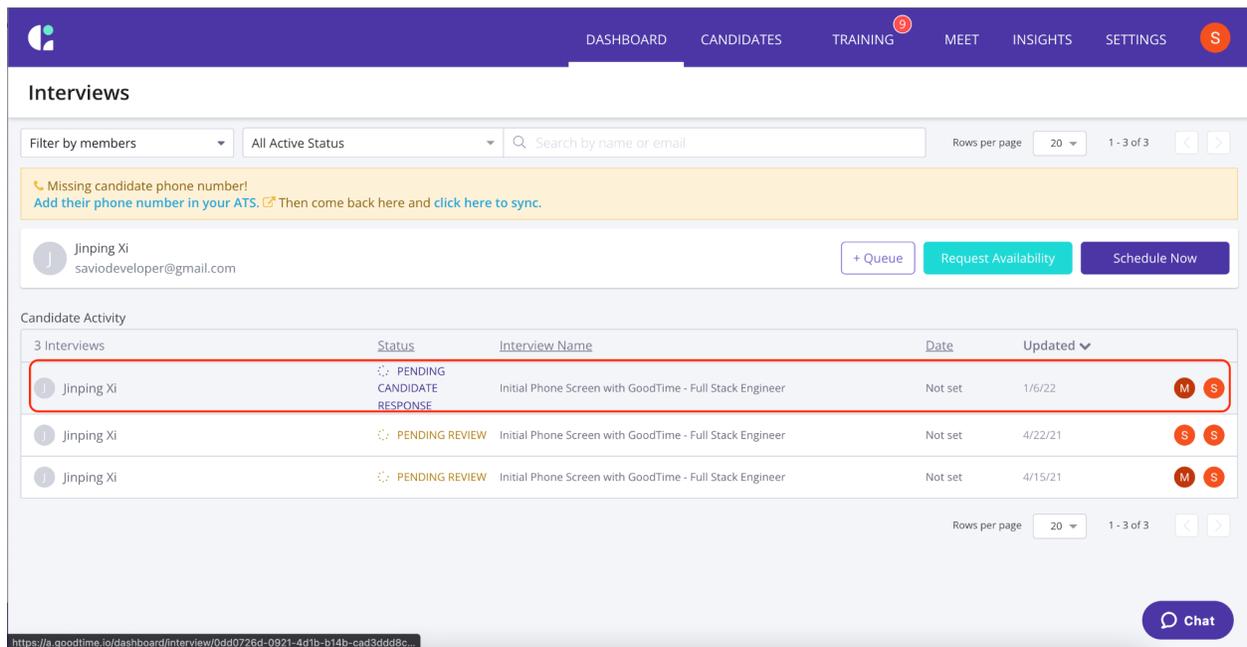
The interface is divided into two main sections:

- Left Panel:** Contains an "Initial Phone Screen with GoodTime - Full Stack Engineer" section with a description field. The description text includes: "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**". Below this is an "Interviewer Event Description" section.
- Right Panel:** Contains an "Email Template" configuration area. The "Email Template" dropdown is set to "Request Availability - Initial Phone Screen" and the "Delivery Time" dropdown is set to "Send Now". The "Subject" field contains "Hi **{jinping}**, Connecting with GoodTime!". The main body of the email template includes: "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}**". At the bottom right of this panel is a "Chat" button. Below the email body is an "Attach Files" section with a note: "(File types supported: pdf, img, png, docx, pptx, xlsx. Total file size limit: 10MB)".

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:

The screenshot displays an interview management interface. On the left, the 'Interviews' section shows a candidate profile for Jinping Xi (saviodeveloper@gmail.com) and a table of candidate activities. The table lists three interviews with statuses: 'PENDING CANDIDATE RESPONSE' and 'PENDING REVIEW'. The right side of the interface shows a 'View full history' section with roles assigned to team members: Recruiter (Manuel Carrillo), Coordinator (Savio Tang), Hiring Manager (Elias Cruz), and Sourcing (Assign to me). Below this is an 'ACTIVITY' feed with a note from Savio Tang stating 'Candidate completed eSign form' at 5:54 PM. A red box highlights this activity note.

Notes:

Variables supported are:

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