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"

DocuSign eSignature	Home	Manage Templates	Reports Setting	gs			0
			Developer E	nvironment			
		DocuSigned by: Baymae Hamadea D4545C199DDD444	Last 6 Months O Action Required	6 Waiting for Others	D Expiring Soon	18 Completed	
			Drop documents h o sta	r			
		Join our next API	Office Hours for live Q ur API integration rollin	&A plus a Quickstari 9.	January 18, 10am PT	REGISTER >	
	Ge	etting Started	Have a	Question?	Con	figure your app	

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

Account Profile		
Security Settings	Find a Setting Find a User	DocuSign University
Regional Settings	Q Enter keyword Enter name SEARCH	Access on-demand and live training to expand your
Brands		product knowledge and become a Docusign expert.
Updates		Knowledge Market Download best practice guides and technical papers
Value Calculator	Notifications	to help you experience the full value of the DocuSign Agreement Cloud.
USERS AND GROUPS		DocuSign Welcome Center
Users	Filtered by: Type: All × Date: Last 3 Months × Reset Filters	Get up and running quickly with a step-by-step checklist to help administrators and end users learn
Permission Profiles		at their own pace.
Groups	Product Update 3 days	Trust Center
Signing Groups	Core Release	privacy, and system performance information.
	New DocuSign features are available in Demo as part of the January 2022 release. Visit the rele	Support Center
SIGNING AND SENDING	CORE RELEASE NOTES	Administrators and end users can find answers to
Signing Settings		and contact Customer Support.
Sending Settings	Product Update 24 days	
Email Preferences	New Admin Release	
Custody Transfer	A new version of DocuSign Admin is available. Visit the release notes page to learn more about	
Document Retention	ADMIN RELEASE NOTES	
Legal Disclosure		
Reminders and Expiration	Account Health 27 days	
Comments	Auto-Disabled Connect Configuration	
Document Custom Fields	One or more of your DocuSign Connect Configurations that have been failing at or near 100% for	
Envelope Custom Fields	CONNECT SETTINGS	
INTEGRATIONS	Product Update 38 days	
Connect	Care Delana	
Apps and Keys		

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 Enve	elope Custon	n Field		
Field Name	*			
GoodTimeP	Payload			
Show fie	eld to envelope cr	eators velopes		
Field Type Text				•
Field Type Text List of value	s (semicolon ser	parated)		

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

	Jee periori				
DocuSign eSignat	ure Home Manage	Templates Reports	Settings		⑦ BH
GoodTime.io	eSign Admin > Envelope Custom Fields				
Account 15: 14/004/1	Envelope Custom Fields	5			ADD FIELD
Overview	Use envelope custom fields to classify, re Here you can add, view, and manage the	cord, and track your sent envelopes. se envelope custom fields.			
ACCOUNT	Q Search SEARCH	H 🚔 FILTER			\$
Plan and Billing		Required All X Depart Filtere			
Account Profile		Required All A Reset Filters			
Security Settings	Name	Туре	Show	Required	
Regional Settings	GoodTimePayload	Text			
Brands		TOXIC			Actions
Updates				d d of d on only on output field and a	
Value Calculator				1 - 1 of 1 envelope custom field FIRS	T < > LAST
USERS AND GROUPS					
Users					
Permission Profiles					
Groups					
Signing Groups					

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

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

Signing Groups

SIGNING AND SENDING

- Signing Settings
- Sending Settings
- Email Preferences
- Custody Transfer
- **Document Retention**
- Legal Disclosure
- Reminders and Expiration
- Comments
- Document Custom Fields
- Envelope Custom Fields

INTEGRATIONS

- Connect Apps and Keys API Usage Center Payments AGREEMENT ACTIONS
- Rules
- Connections

AUDITING

Audit Logs

Bulk Actions

2. Under "APPLICATIONS", Click "ADD CONFIGURATION" and "Custom"

DocuSign eSignat	ture Home Manage Te	nplates Reports	Settings			(?) BH
GoodTime.io Account ID: 14763477	Connect DocuSign Connect is a push service that sence	real-time data updates to exten	nal applications.			DISABLE CONNECT
Overview	APPLICATIONS CONNECT KEYS	PUBLISH LOGS FA	AILURES			
ACCOUNT Plan and Billing						
Account Profile	Custom		Configuration ID	Status	Failures	
Security Settings Regional Settings			10262000	Active	0	ACTIONS *
Brands	Salesforce		10253827	Active	1	ACTIONS V
Updates Value Calculator	C eOriginal					
USERS AND GROUPS						
Users						
Permission Profiles						
Groups Signing Groups						
SIGNING AND SENDING						
Signing Settings						
Sending Settings						
Email Preferences						
Custody Transfer						
Document Retention						

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)

DocuSign eSignat	ure Home Manage Templates Reports Settings	(? BH
GoodTime.io Account ID: 14763477	Connect Configurations List > Add Custom Configuration Add Custom Configuration	ADD CONFIGURATION
Overview	Listener Settings	
ACCOUNT	Status	
Plan and Billing	Active Connection	
Account Profile		
Security Settings	Name *	
Regional Settings	GoodTime Prod Test (Connect 2.0)	
Brands	URL to Publish *	
Updates	https://hire.service.goodtime.io/esign/docusign/callback	
Value Calculator	HTTPS required	
USERS AND GROUPS	Enable Log (maximum 100)	
Users	Require Acknowledgement	
Permission Profiles		
Groups		
Signing Groups	Event Settings	
	Data Format	
SIGNING AND SENDING	REST v2.1	
Signing Settings	This cannot be changed once the configuration is saved.	
Sending Settings	Event Message Delivery Mode (?)	
Email Preferences	Send Individual Messages (SIM)	
Custody Transfer		

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"

eminders and Expiration	Envelope and Recipients		
ments			
t Custom Fields			
ustom Fields	Envelope Events:	Recipient Events:	
	Envelope Sent	Recipient Sent	
TEGRATIONS	Envelope Delivered	Recipient Auto Responded	
nect	Envelope Signed/Completed	Recipient Delivered	
nd Keys	Envelope Declined	Recipient Signed/Completed	
ge Center	Envelope Voided	Recipient Declined	
	Envelope Resent	Recipient Authentication Failure	
ENT ACTIONS	Envelope Corrected	Recipient Resent	
	Envelope Purge	Recipient Delegate	
ons	Envelope Deleted	Recipient Reassign	
	Envelope Discard	Recipient Finish Later	
ogs	^ Include Data 💿		
tions			
		JSON Payload Sample (trimmed)	
	Custom Fields		
	Documents	{ "event": "recipient-sent",	
	Attachments	"uri": "/restapi/{apiVersic "retryCount": "0",	on}/accounts/{accountId}/envelopes/{enve
	Extensions	<pre>"configurationId": "xxxxxxx "apiVersion": "v2.1",</pre>	ς",
	Folders	"generatedDateTime": "", "data": {	
	Recipients	"accountId": "xxxxxxxx- "recipientId": "1",	-xxxx-xxxx-xxxx-xxxxxxxxxxxxxxxx*,
	Powerform	"envelopeId": "xxxxxxx "envelopeSummary": {	
	Tabs	"status": "sent", "emailSubject": "AE	PI Demo subject",
		"emailBlurb": "Plea "signingLocation":	ase sign this Demo Envelope", "online",
	Fayment rabs	"enableWetSign": "t	rue",

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 Events:
	Emelope Cellinged
	Envelope Derivered Envelope Derivered
	Envelope Signed Completed
	Envelope Decimied
	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 VEVE
	manage nella
	Include Basic Authentication Header
	Add a username and password to the header to verify message authenticity
	Other Settings:
	Enable Mutual ILS

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

	Integration and Security Settings	
	Include HAAC Signature (Recommended) ① 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	
	SAVE CONFIGURATION CANCEL	
Powered by DocuSion	Evrifich 1181 V Context IIs Terms of Like Privacy Intellactual Promety Trist	Conversite El 2022 DocuSion Jon All visitos reserved

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".

ocuSign eSignature	Home	Manage	Templates	Reports	Settings				0
					Developer Environr	nent			
NEW T	Envelopes Clic	kwraps							
Shared Envelopes	✓ 1 Selected	DELETE							
ENVELOPES	Name					Responses	Status	Sender	
inbox Ø Sent	NDA Temp	ORM NDA EXAMI late example.pdf	PLE!			35	Active	Baymax Hamada	DOWNLOAD V
Drafts									Edit View Envelopes
E Bulk Send									Copy URL Deactivate
PowerForms									Change Sender
QUICK VIEWS									Delete
Action Required									
 Waiting for Others 									
Expiring Soon									
Completed									
Authentication Failed									
* FOLDERS +									

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 ***

DocuSign eSignature	Home Manage Ter	nolates Reports Settinas	×		(? BH
NEW ¥	Envelopes Clickwraps	URL LINK EMBED CODE			
Shared Envelopes	V 1 Selected DELETE	URL			
ENVELOPES	Name	https://demo.docusign.net/Member/Power-ormSigning.aspx?Power-or	tus	Sender	
inbox ☆ Sent	POWER FORM NDA EXAMPLE! NDA Template example.pdf	СОРУ	Active	Baymax Hamada	DOWNLOAD *
C> Drafts					
Bulk Send NEW					
PowerForms					
QUICK VIEWS					
Action Required					
 Waiting for Others 					
A Expiring Soon					
Completed Authentication Failed					
▼ FOLDERS +					

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.

C	dashboard candidates training meet insights settings 😭
My Account	Company Settings Save
Company Interview Templates	E-Sign
Interview Settings Jobs Email Templates	▶ Docusign Connected ∨
Team Rooms	Docusign integration has been setup.
Tag Manager > Branding API Access About	Tip: TBD "Settings > Integrations > Connect > Applications > Add Configuration > Custom > URL to Publish" and create a new Custom Field named 'GoodTimePayload' under "Settings > Signing and Sending > Envelope Custom Fields"
	PowerForm URL usign.net/Member/PowerFormSigning.aspx?PowerFormId=e9b6d0cc-cc88-462c-9d90-15f00ba0ac9f&env=demo&acct=f293c015-2146-425e-99ab-f2d385f416cb&v=ス Disconnect

4. In GoodTime's "Request Availability" or "Schedule Now" workflow a user can insert a variable token "SDocusign.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:

C	DASHBOARD	CANDIDATES TRAII	NING MEET	INSIGHTS SETTI	NGS S	
Interviews						
Filter by members	▼ Q Jinping Xi		Rows per	page 20 💌 1 - 2 of	f2 < >	
Second S						
Jinping Xi saviodeveloper@gmail.com		+	Queue Request /	Availability Sche	dule Now	
Candidate Activity						
2 Interviews Status	Interview Name		Date	Updated 🗸		
Jinping Xi	ING REVIEW Initial Phone Screen with GoodTime	- Full Stack Engineer	Not set	4/22/21	S S	
Jinping Xi	ING REVIEW Initial Phone Screen with GoodTime	- Full Stack Engineer	Not set	4/15/21	M (S)	
			Rows per	page 20 💌 1 - 2 of	f2 < >	
					() Chat	

•	DASHBOARD CANDIDATES TRAINING MEET INSIGHTS SETTINGS S					
equest availability from Jinping Xi	247 Available interview slots Request Availability					
Initial Phone Screen with GoodTime - Full Stack Engineer	Email Template Delivery Time					
Description	Request Availability - Initial Phone Screen v Send Now v					
B I ≔ j≡ %						
Hello (Jinping),	Subject					
We think you maybe a fit for Full Stack Engineer. We will connect with you on Sinterview.Zoom.Link at SInterview.Start.DateTime. Should you need to reschedule you can use the Event Confirmation link below to reschedule your day and time.	B I I III III III III IIII IIII IIIIIIII					
If you have any questions please don't hesitate to reach	Before proceeding to scheduling, please sign this NDA document:					
Savio	\$Docusign.PowerForm					
\$Coordinator.PhoneNumber savio@goodtimedemo.com	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					
Interviewer Event Description	(\$Recruiter.Email					
Description	D Chat					
\mathbf{p} $\mathbf{r} := := \mathbf{q}$	Attach Files (File types supported: pdf, ipg, 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:

C		DASHBOARD	CANDIDATES	9 TRAINING	MEET	INSIGHTS	SETTINGS	
Interviews								
Filter by members All Active Status		 Q Search by name or email 			Rows pe	page 20 💌	1 - 3 of 3	
Solution Control C	ack here and <mark>click her</mark> e	e to sync.						
Jinping Xi saviodeveloper@gmail.com				+ Queue	Request .	Availability	Schedule	Now
Candidate Activity								
3 Interviews	<u>Status</u>	Interview Name			Date	Updated 🗸	•	
Jinping Xi	CANDIDATE RESPONSE	Initial Phone Screen with GoodTime	Full Stack Engineer		Not set	1/6/22		M (5)
Jinping Xi	() PENDING REVIEW	Initial Phone Screen with GoodTime	Full Stack Engineer		Not set	4/22/21		S S
Jinping Xi	() PENDING REVIEW	Initial Phone Screen with GoodTime	Full Stack Engineer		Not set	4/15/21		M S
					Rows pe	page 20 🔻	1 - 3 of 3	
	-04440-						2) Chat

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

C		Close	Update Continue >
Interviews		View full history	
Filter by members All Active Status 	• Q Search	Recruiter C	Coordinator
Section Control Contr	to sync.	Manuel Carrillo manuel@goodtimedemo.com	Savio Tang savio@goodtimedemo.com
Jinping Xi saviodeveloper@gmail.com		Hiring Manager S	Sourcer
		Elias Cruz	Assign to me
Candidate Activity		enas@goodtimedemo.com	
3 Interviews Status	Interview Nar	ACTIVITY	
Inping Xi CANDIDATE RESPONSE	Initial Phone Sc	8 Add a note	Q
Jinping Xi 🔅 PENDING REVIEW	Initial Phone Sc	e.g. Candidate asked to be rescheduled in the after	
Jinping Xi	Initial Phone Sc		
		S Note from Savio Tang	5:54 PM 🔎
		Candidate completed eSign form	
			Q Chat

Notes:

Variables supported are:

• \$Docusign.PowerForm - to pull the Docusign PowerForm URL