

Docusign Integration with Alchemer Survey

The Alchemer Docusign Integration is available as an add-on. If you are interested in purchasing the Docusign Integration, please [contact us](#) for additional information.

At a high-level, Alchemer's integration with Docusign allows you to easily:

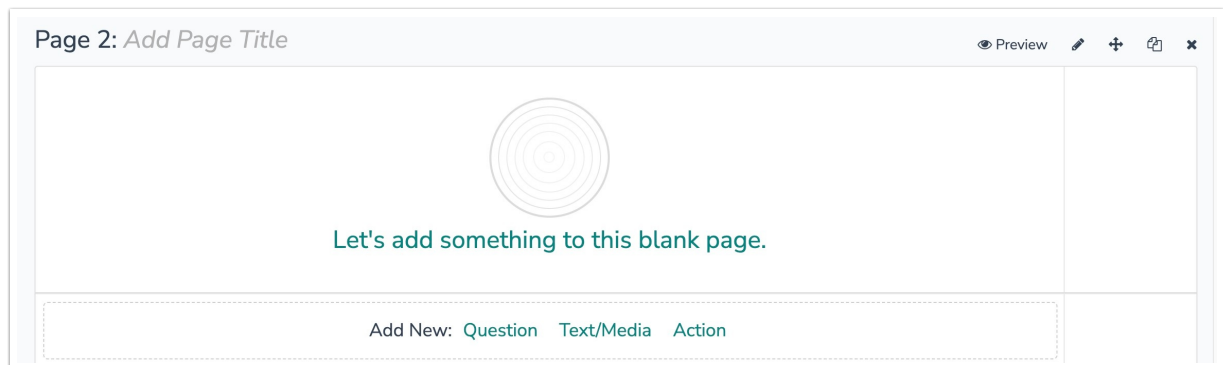
- Push survey data from Alchemer into Docusign so that you can send out a Docusign envelope to a signer
- Pull in information from a Docusign envelope and use that information in an Alchemer Survey

Integration Setup

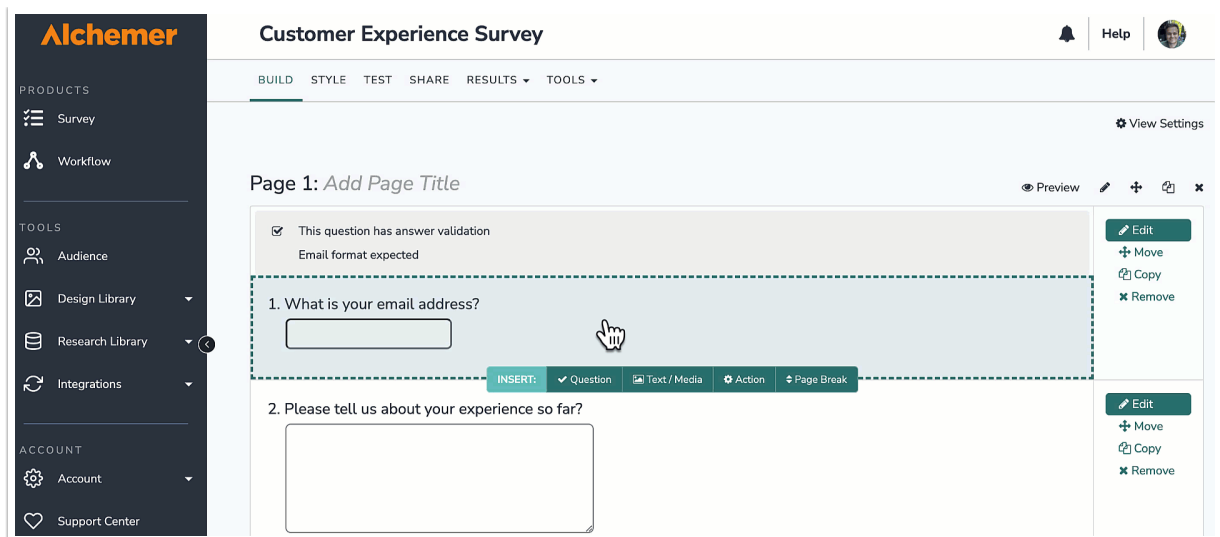
Adding an Integration Action

1. Select an existing survey or create a new survey. Then navigate to the Survey Builder.
2. Click "Add New: Action"

You cannot add this Integration Action to the first page of the survey.



3. In the Add Action modal, scroll down to Integrations. Then click "Add" for one of your purchased integrations.



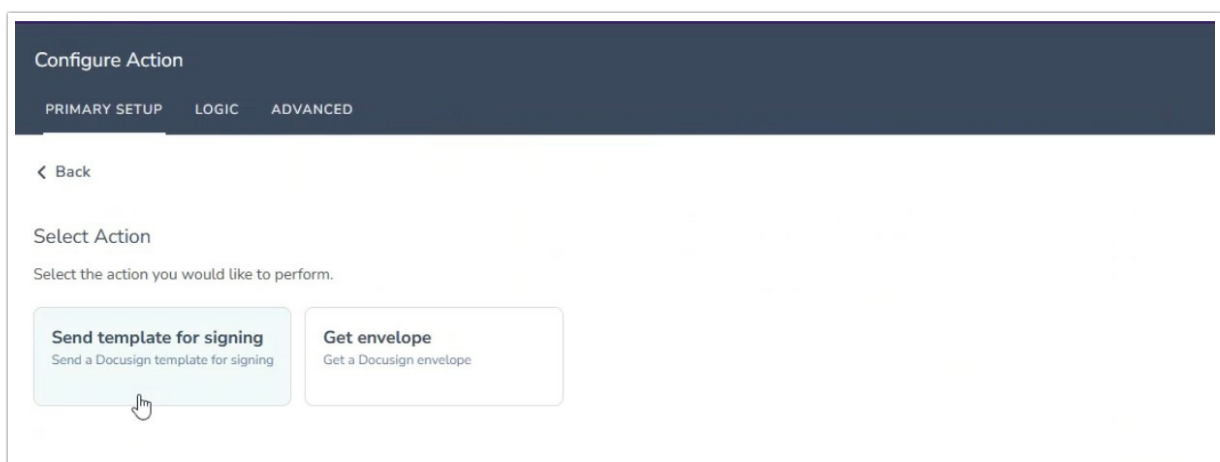
If you haven't purchased any additional integrations, you will see the below screen:

Integrations

Don't see what you're looking for? [Explore our integrations](#)

4. Select the action you would like to perform.

- Send a template for signing. [Jump to section.](#)
- Get envelope. [Jump to section.](#)



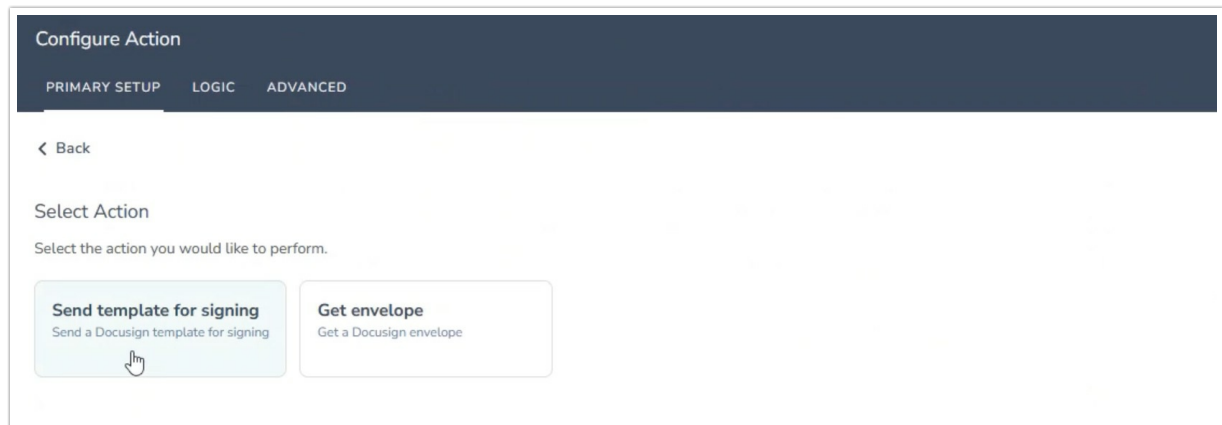
Docusign | Send Template for Signing

To configure this integration you will need:

- To authenticate with Docusign
- Your Account ID

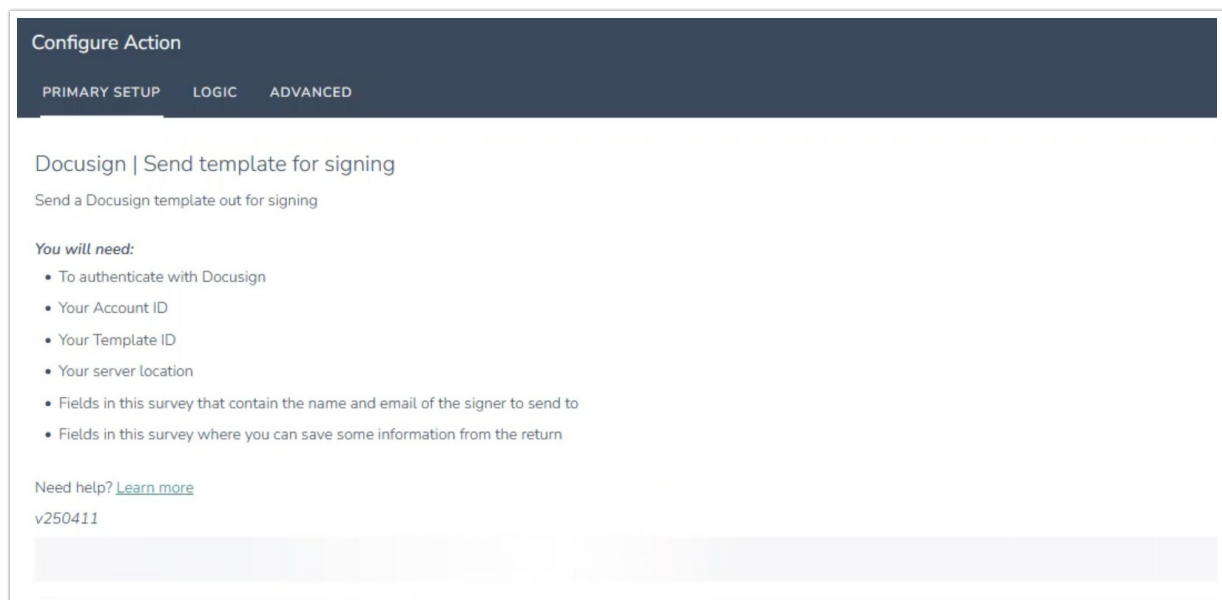
- Your Template ID
- Your server location
- Fields in this survey that contain the name and email of the signer to send it
- Fields in this survey where you can save some information from the return.

1. Select "Send template for signing".



The screenshot shows the 'Configure Action' interface with three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. The 'PRIMARY SETUP' tab is active. Below the tabs, there is a 'Back' link. The main section is titled 'Select Action' with the instruction 'Select the action you would like to perform.' There are two buttons: 'Send template for signing' (highlighted with a hand cursor) and 'Get envelope'. The 'Send template for signing' button has a subtext 'Send a Docusign template for signing'.

2. Click "Next" on the integration overview screen.



The screenshot shows the 'Configure Action' interface with the 'PRIMARY SETUP' tab active. The title is 'Docusign | Send template for signing' with the subtitle 'Send a Docusign template out for signing'. Under the heading 'You will need:', there is a list of requirements: 'To authenticate with Docusign', 'Your Account ID', 'Your Template ID', 'Your server location', 'Fields in this survey that contain the name and email of the signer to send to', and 'Fields in this survey where you can save some information from the return'. At the bottom, there is a link 'Need help? [Learn more](#)' and a version number 'v250411'.


3. Authenticate with Docusign

Configure Action

PRIMARY SETUPLOGICADVANCED

Docusign | Authentication

Authenticate with Docusign

 Docusign connected
Justin's Docusign

▼

...

4. Provide your Docusign Account ID

You can find this at the top of your admin dashboard.

Configure Action

PRIMARY SETUPLOGICADVANCED

Docusign | Account ID

Please enter your account ID from your Docusign account. This can be found at the top of your admin dashboard.

Account ID*

<empty string>

Account ID is required

5. Enter the template ID from Docusign that you would like to send out.

The template ID can be found inside your template by clicking the "Template ID" button.

Configure Action

PRIMARY SETUPLOGICADVANCED

DocuSign | Template ID

Please enter the template ID from DocuSign that you would like to send out. This can be found inside your template by clicking the "Template ID" button.

Template ID*

<empty string>

Template ID is required

6. Enter your server location.

This can be found under the "Apps and Keys" section of your admin portal. This will be something like NA2, CA, or EU

Configure Action

PRIMARY SETUPLOGICADVANCED

DocuSign | Server location

Please enter your server location. This can be found under the "Apps and Keys" section of your admin portal.

Server*

<empty string>

Server is required

This will be something like NA2, CA, or EU

7. Select the fields you want to use to map the name and email of the signer you wish to send to.

How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)
2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in DocuSign and used as [Merge Codes](#) in your survey.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

DocuSign | Name and email

Select the fields you would like to use to map the name and email of the signer you would like to send to

The name and email are both required

Use this Alchemer field value

to match this DocuSign field

Question 1. Input 1 (id: 4)	DocuSign name	
Question 2. Input 2 (id: 5)	DocuSign email	

Add a new mapping

8. Select fields you would like to get back from the DocuSign return.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

DocuSign | Get data back

Select fields that you would like to get back from the DocuSign return

These are optional

Use this DocuSign field

To update this Alchemer survey field

Action Metadata message	Question 3. Output 1 (id: 6)	
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Add a new mapping

9. Click "Save" to complete the integration setup.

Configure Action
PRIMARY SETUP
LOGIC
ADVANCED

DocuSign | Setup complete

A log of each run result can be found in the Individual Responses > Action Log.

A status code is available in the action metadata:

200: Successfully sent envelope.

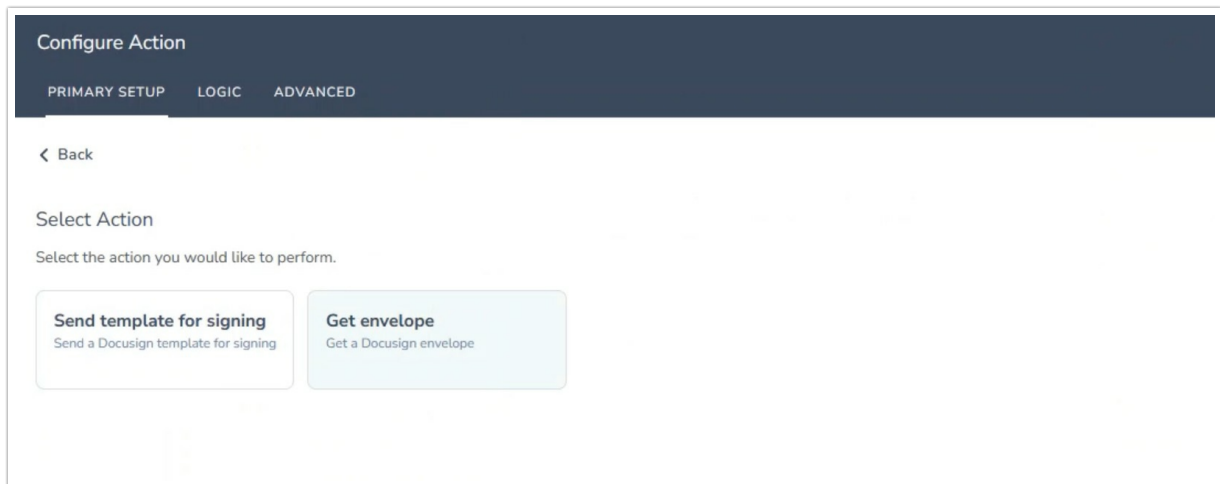
400: Failed to send envelope.

Docusign | Get Envelope

To configure this integration you will need:

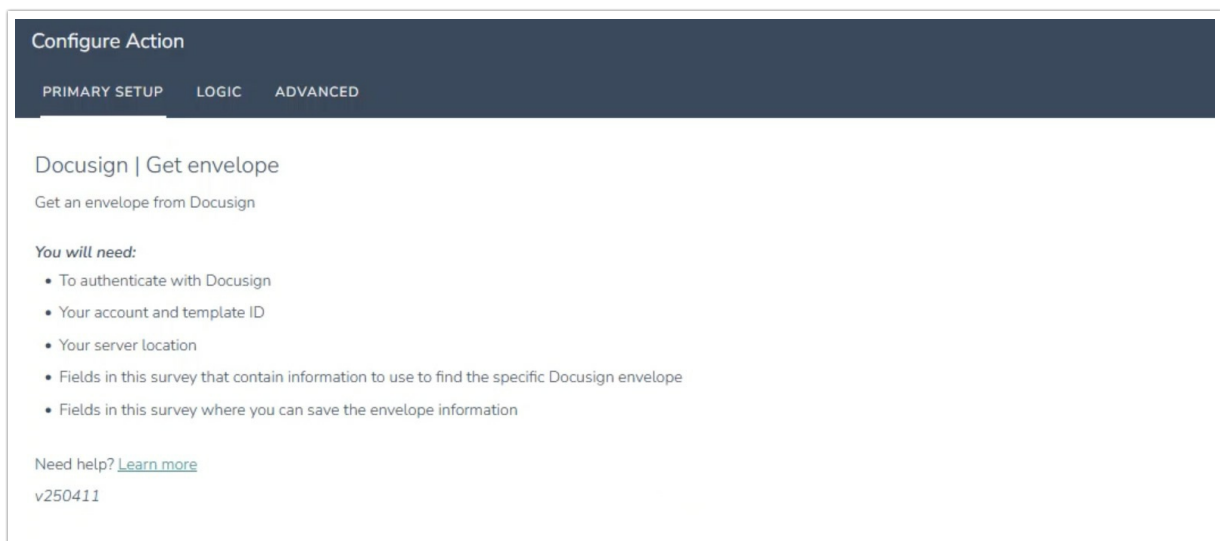
- To authenticate with Docusign
- Your Account ID
- Your Template ID
- Your server location
- Fields in this survey that contain information to use to find the specific Docusign envelope
- Fields in this survey where you can save some the envelope information.

1. Select "Get envelope"



The screenshot shows the 'Configure Action' interface with a dark blue header. Below the header are three tabs: 'PRIMARY SETUP', 'LOGIC', and 'ADVANCED'. A 'Back' link is visible. The 'Select Action' section contains the instruction 'Select the action you would like to perform.' and two buttons: 'Send template for signing' (outlined) and 'Get envelope' (solid light blue). The 'Get envelope' button has the subtext 'Get a Docusign envelope'.

2. Click "Next" on the overview screen.



The screenshot shows the 'Configure Action' interface with the 'PRIMARY SETUP' tab selected. The title is 'Docusign | Get envelope' with the subtitle 'Get an envelope from Docusign'. Under 'You will need:', there is a list of requirements: 'To authenticate with Docusign', 'Your account and template ID', 'Your server location', 'Fields in this survey that contain information to use to find the specific Docusign envelope', and 'Fields in this survey where you can save the envelope information'. At the bottom, there is a link 'Need help? [Learn more](#)' and the version number 'v250411'.

3. Authenticate with DocuSign

Configure Action

PRIMARY SETUP LOGIC ADVANCED

DocuSign | Authentication

Authenticate with DocuSign

DocuSign connected
Justin's DocuSign

4. Provide your DocuSign Account ID

You can find this at the top of your admin dashboard.

Configure Action

PRIMARY SETUP LOGIC ADVANCED

DocuSign | Account ID

Please enter your account ID from your DocuSign account. This can be found at the top of your admin dashboard.

Account ID*

<empty string>

Account ID is required

5. Enter the Envelope ID from DocuSign.

This can be found by opening up an envelope in your agreements tab (In the URL or "Envelope ID" button)

This will be used to pull in a sample JSON return for your fields to return.

Configure Action

PRIMARY SETUPLOGICADVANCED

DocuSign | Template ID

Please enter the template ID from DocuSign that you would like to send out. This can be found inside your template by clicking the "Template ID" button.

Template ID*

<empty string>

Template ID is required

6. Enter your server location.

This can be found under the "Apps and Keys" section of your admin portal. This will be something like NA2, CA, or EU

Configure Action

PRIMARY SETUPLOGICADVANCED

DocuSign | Server location

Please enter your server location. This can be found under the "Apps and Keys" section of your admin portal.

Server*

<empty string>

Server is required

This will be something like NA2, CA, or EU

7. Select the fields in this survey that contain the values you want to use to find the specific DocuSign envelope.

How to Create Fields in Alchemer

1. Add survey questions that when answered will provide the desired field. (Example: What is the customer email address?)
2. Create a container using a [Hidden Value](#). These Hidden Values can then be mapped to fields in DocuSign and used as [Merge Codes](#) in your survey.

Configure Action

PRIMARY SETUPLOGICADVANCED

DocuSign | Find envelope

Select the fields in this survey that contain the values you want to use to find the specific DocuSign envelope.

Use this Alchemer field value

Question | 1. Input (id: 2)

to match this DocuSign field

DocuSign | envelopeld

Add a new mapping

8. Select the fields you want to get back.

Configure Action

PRIMARY SETUPLOGICADVANCED

DocuSign | Get data back

Select the fields you want to get back.

Use this DocuSign field

Action | Metadata | message

DocuSign | recipients | signers | 0 | email

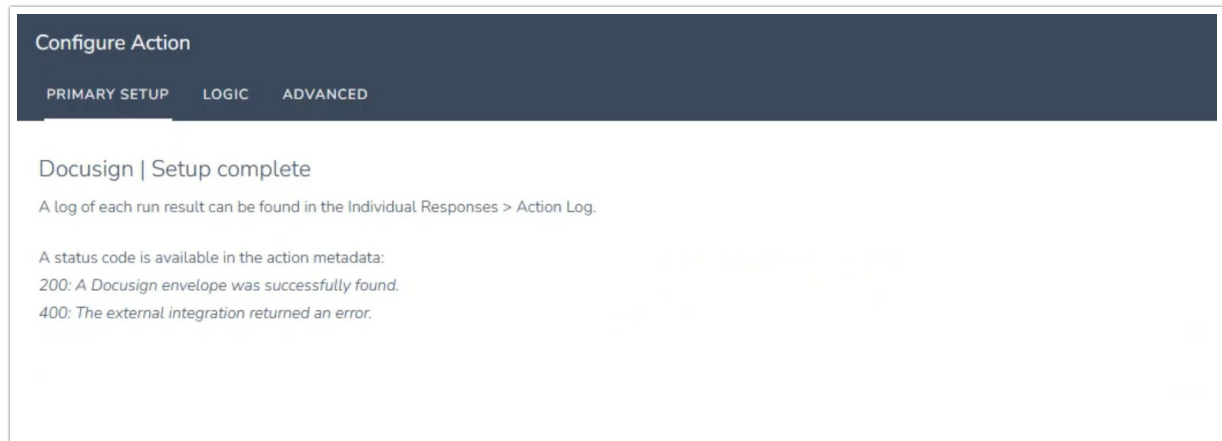
To update this Alchemer survey field

Question | 2. Output (id: 3)

Question | 3. Output 2 (id: 6)

Add a new mapping

9. Click "Save"



Monitoring a Docusign Integration Action

A log of each run result can be found in Results > Individual Responses > Action Log.

Select an individual response and then navigate to the Action Log. In the Action Log you can monitor if the action was successful or not.

FAQs

- ▶ What permissions do I need within Alchemer to set-up and use the Docusign integration?
- ▶ This integration doesn't fit my use cases, or I want to provide feedback to Alchemer!

Related Articles