Docusign Integration with Alchemer Workflow

> The Alchemer Workflow Docusign Integration is available for purchase as an add-on. If you are interested in purchasing, please contact us for more information.

Overview

With the Docusign Integration for Alchemer Workflow you can:

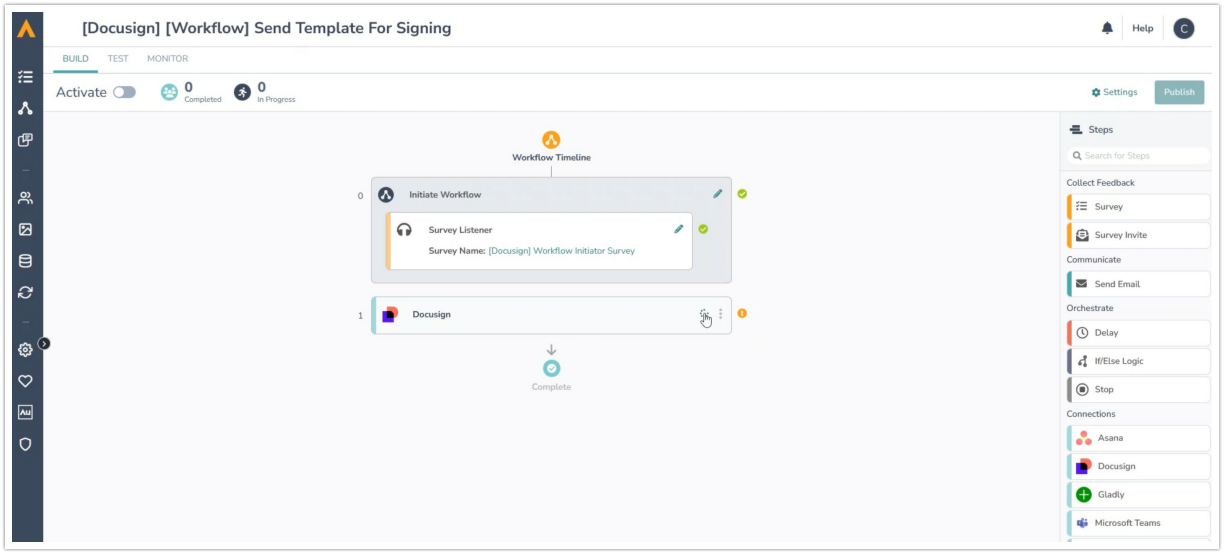
- Push workflow data from Alchemer into Docusign so that you can send out a Docusign envelope to a signer
- Pull in information from a Docusign envelope and use that information in an Alchemer Workflow

Adding a Docusign Step to your Workflow

1. Create a Workflow in Alchemer and select your initiator.

> For more information on building Workflows in Alchemer refer to the following documentation:
>
> - Getting Started with Alchemer Workflow
> - Building a Workflow

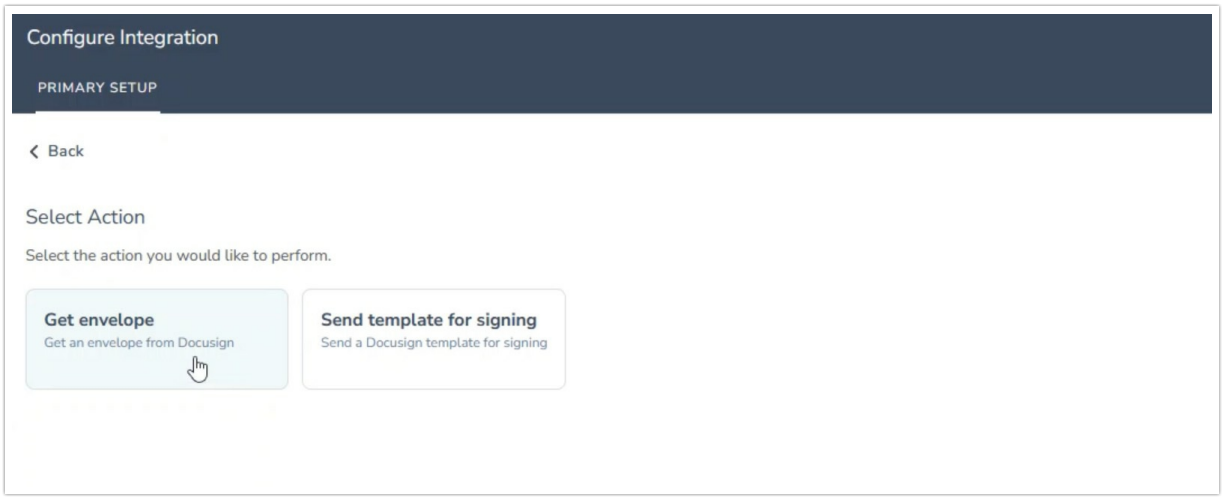
2. When you are ready to add the Docusign step to your Workflow, drag the Docusign step from the Step Library under Connections.



3. Click the pencil icon to configure your Docusign integration step.

4. Select Docusign as your integration and then select the action you would like to perform:

- Send a template for signing. Jump to section.
- Get an envelope from Docusign. Jump to section.

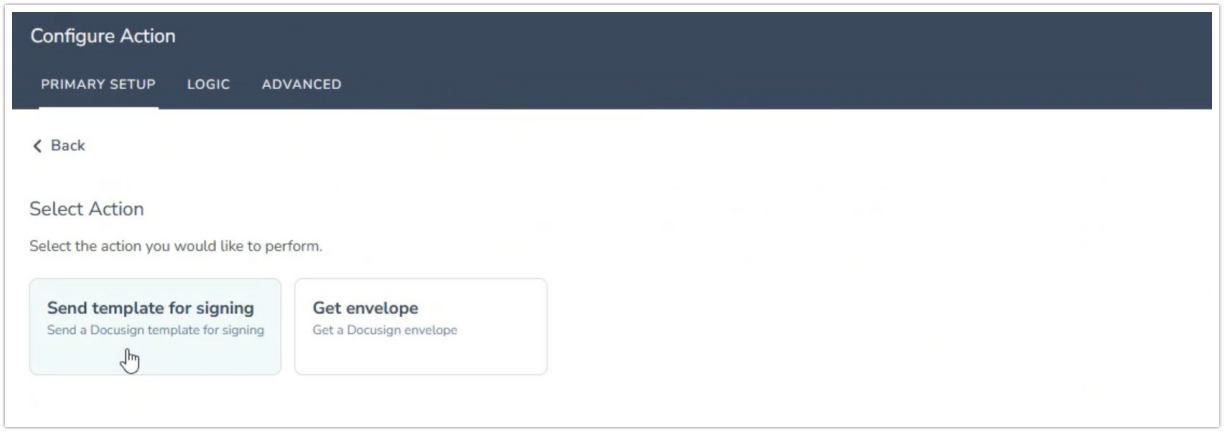


Docusign | Send Template for Signing

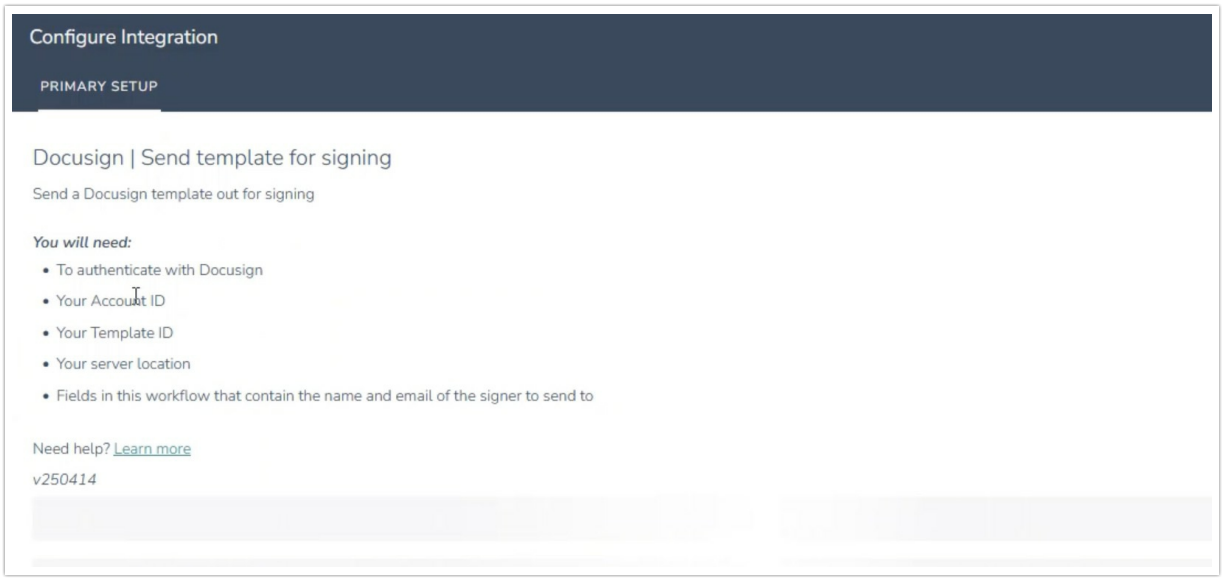
To configure this integration you will need:

- 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

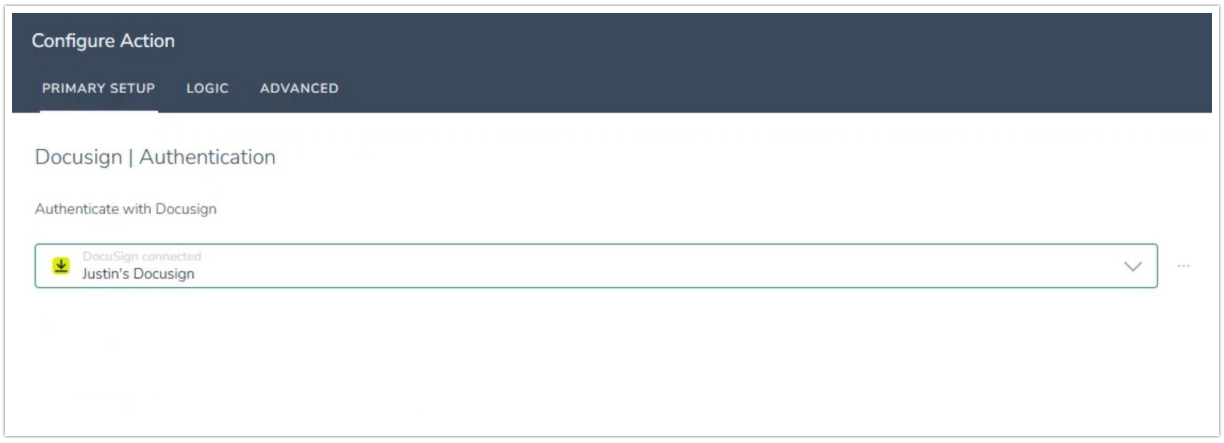
1. Select "Send template for signing".



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

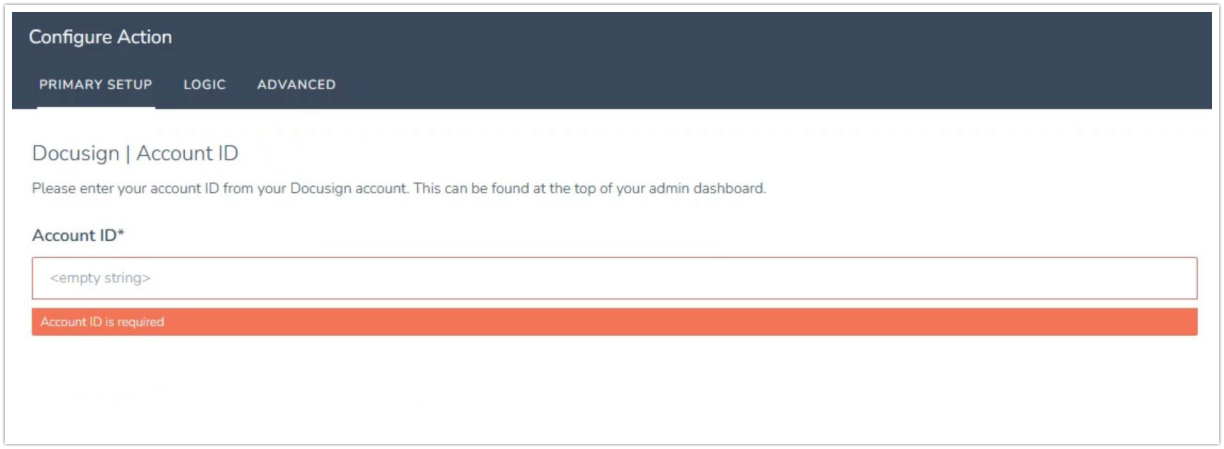


3. Authenticate with Docusign



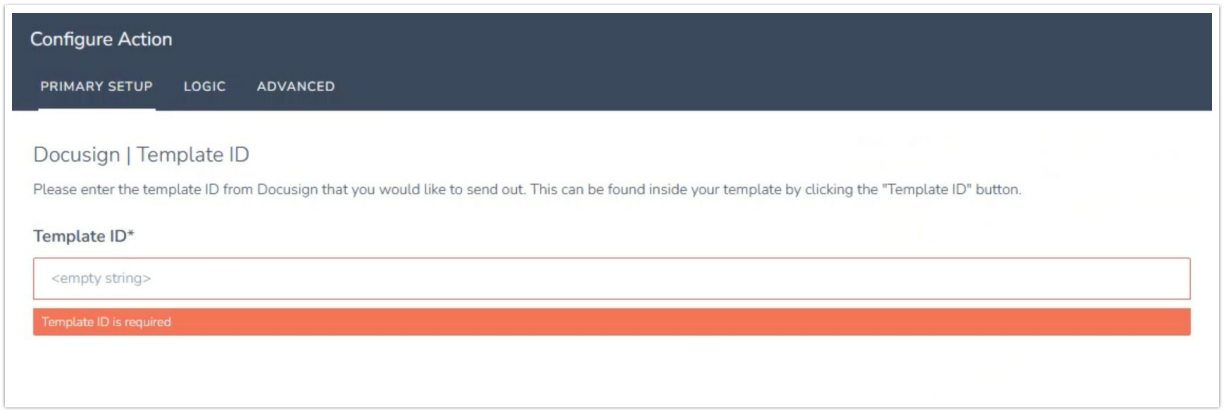
4. Provide your Docusign Account ID

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



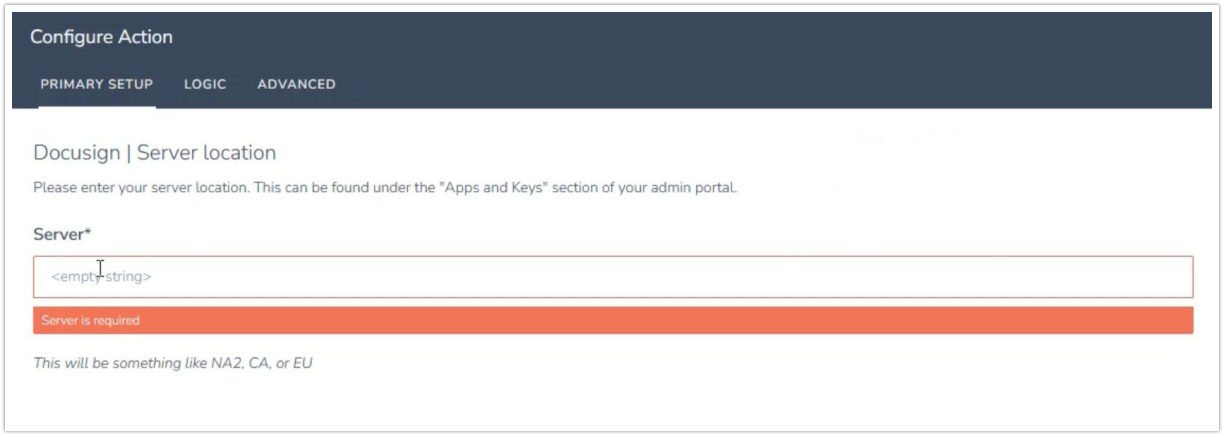
5. Enter the template ID from Docusign that you would like to send out.

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



6. Enter your server location.

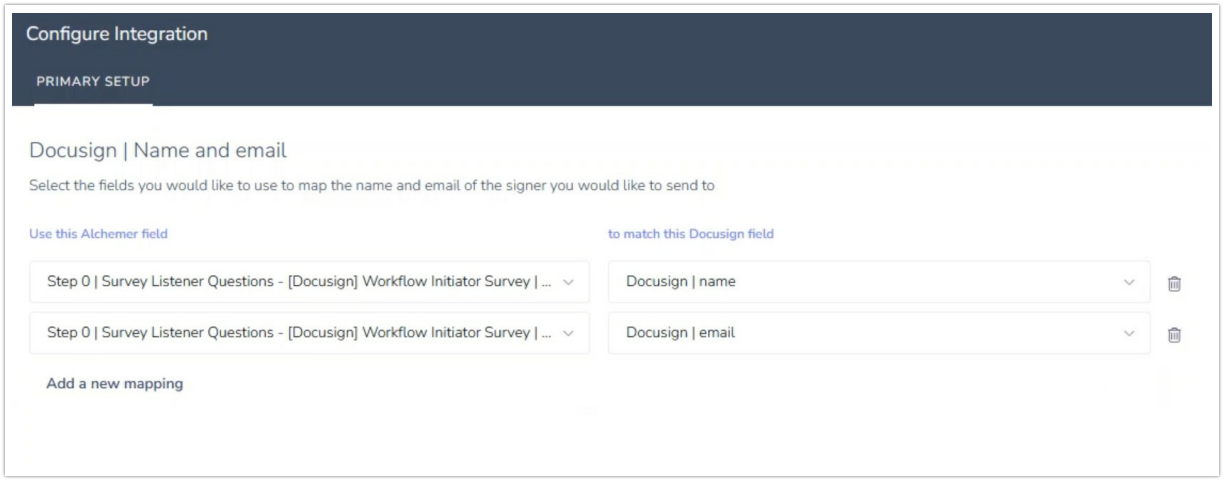
> This can be found under the "Apps and Keys" section of your admin portal. This will be something like NA2, CA, or EU



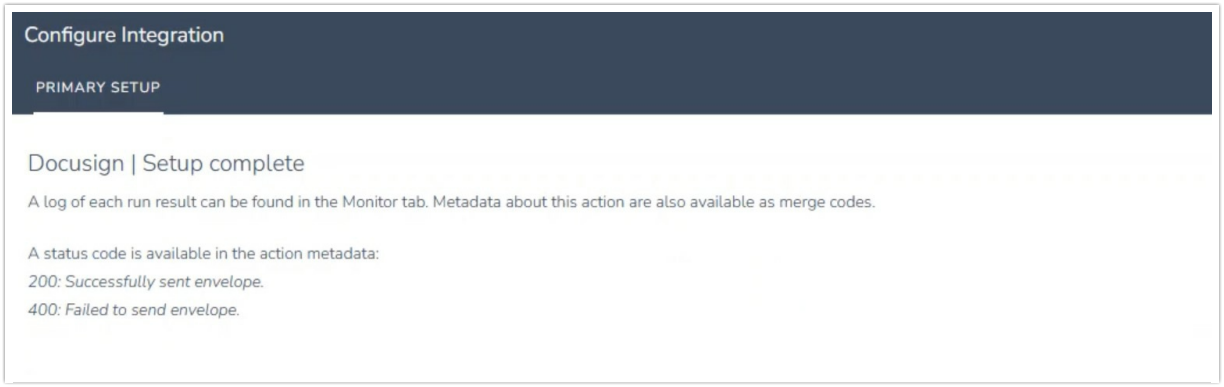
7. Select the fields you want to use to map the name and email of the signer you wish to send to.

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.



8. Click save.



Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys in this workflow. You can use them to:

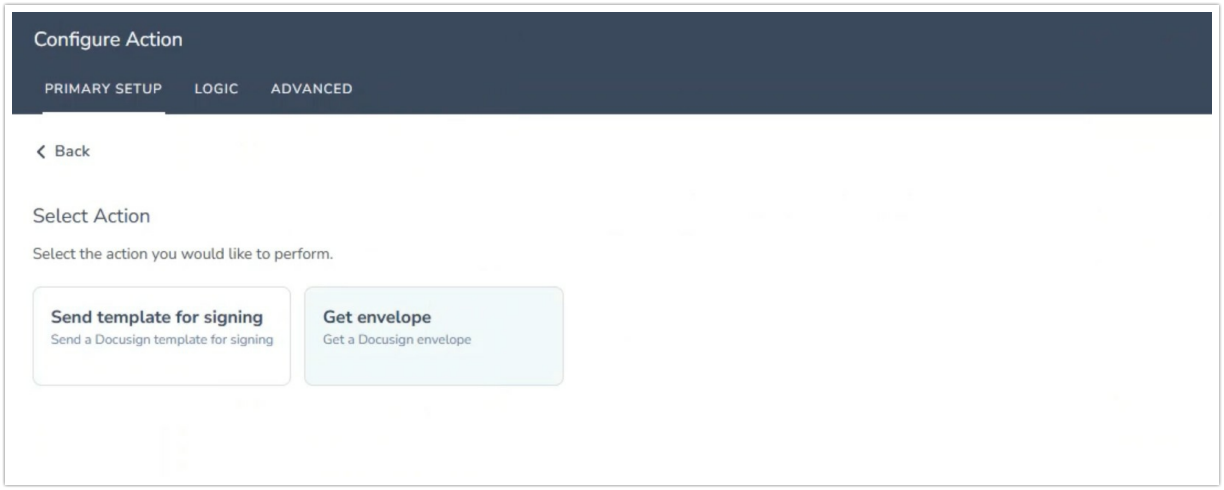
- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

Docusign | Get Envelope

To configure this integration you will need:

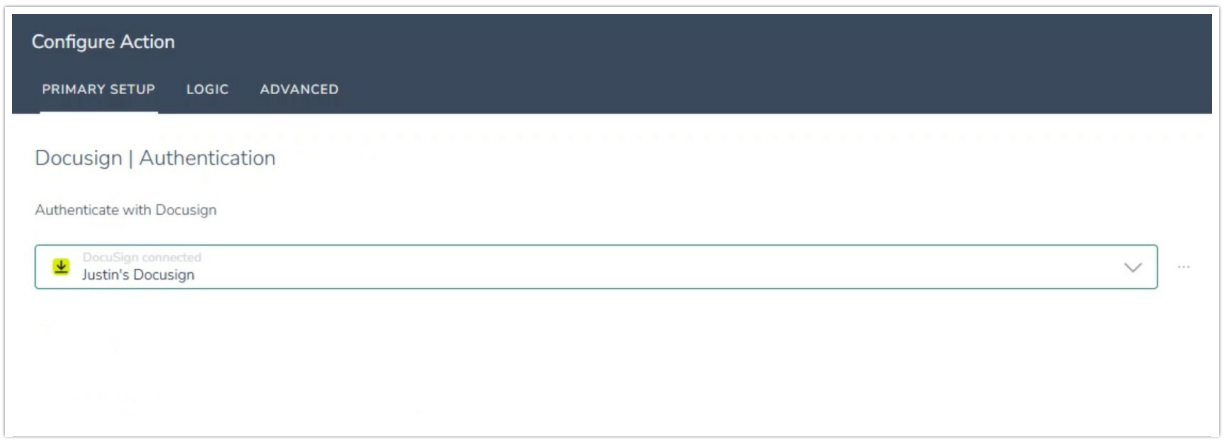
- To authenticate with Docusign
- Your Account ID
- Your Template ID
- Your server location
- Fields in this workflow that contain information to use to find the specific Docusign envelope

1. Select "Get envelope"



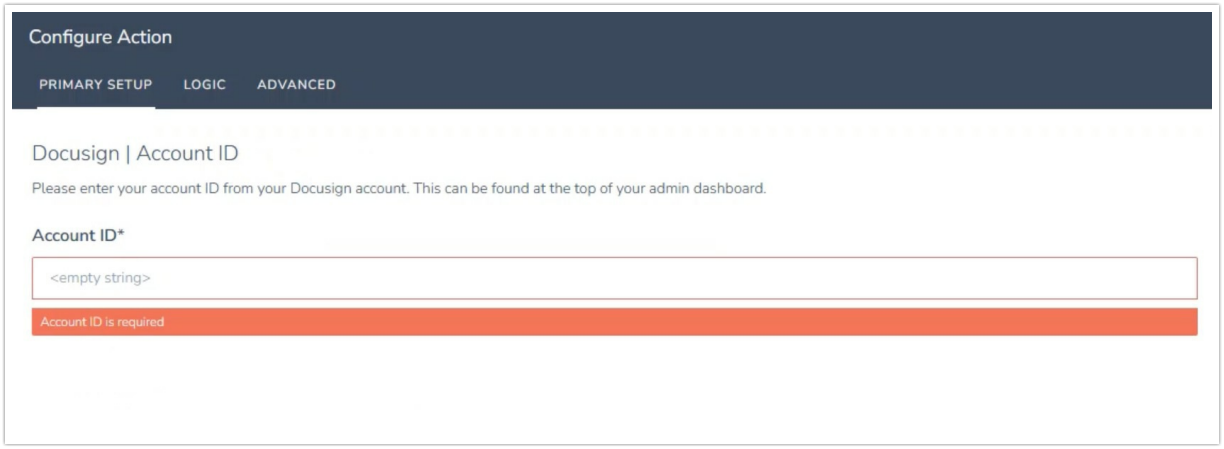
2. Click "Next' on the overview screen.

3. Authenticate with Docusign



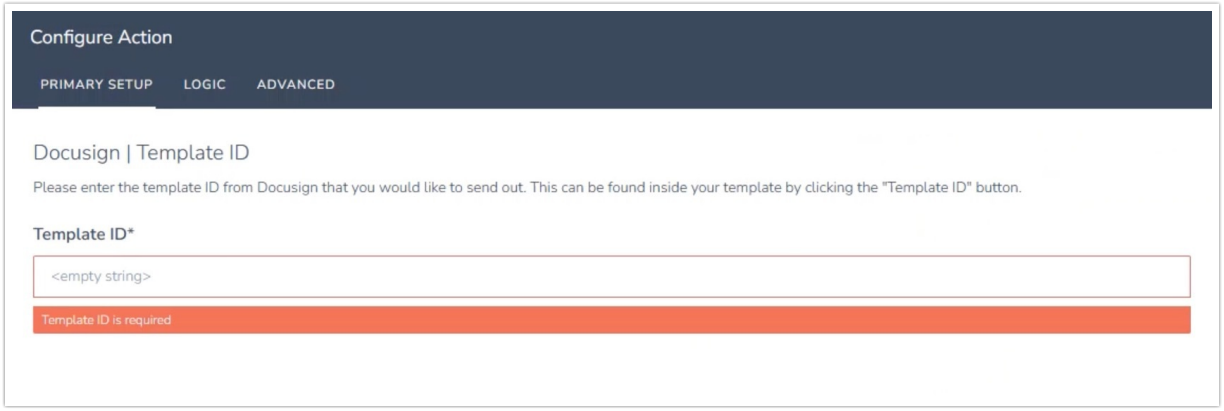
4. Provide your Docusign Account ID

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



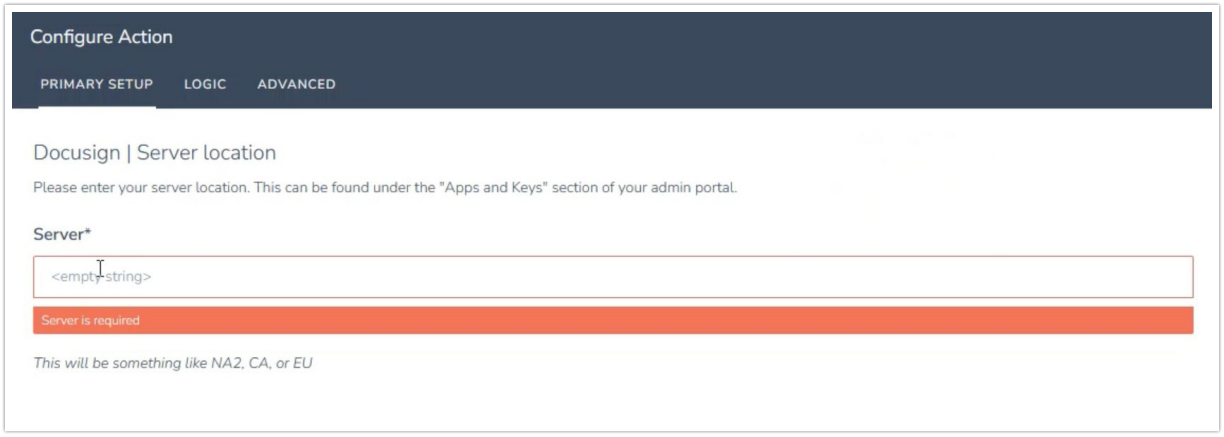
5. Enter the Envelope ID from Docusign.

> 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.

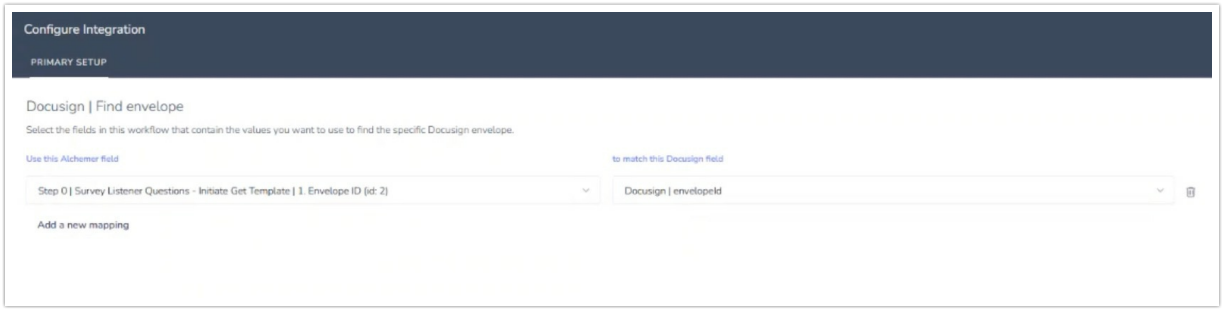


6. Enter your server location.

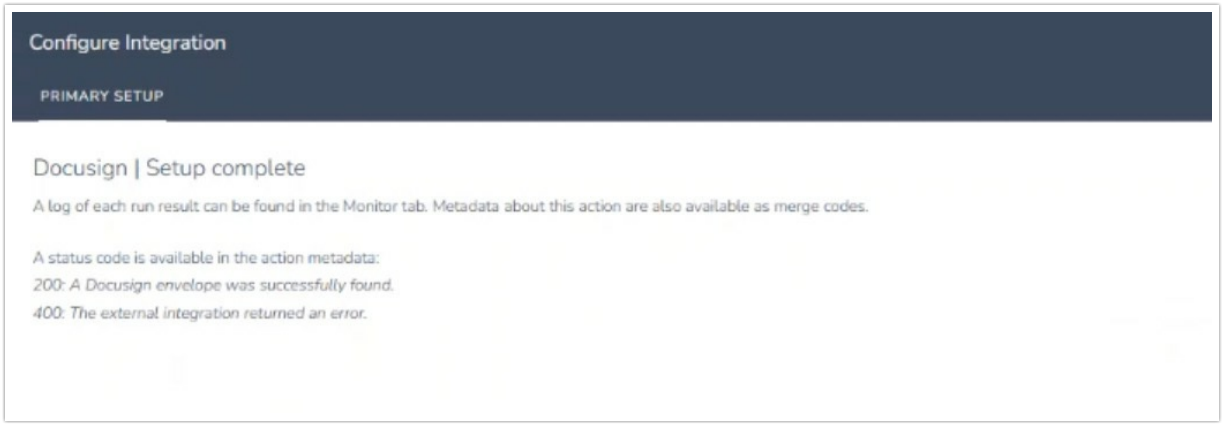
> This can be found under the "Apps and Keys" section of your admin portal. This will be something like NA2, CA, or EU



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



8. Click "Save"



Now what / Where is my data?

All of the information from this integration is now available in this workflow and all surveys

in this workflow. You can use them to:

- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

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 the Alchemer Product Team!

Related Articles