

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.

The screenshot displays the Alchemer Workflow Builder interface. At the top, the workflow title is "[DocuSign] [Workflow] Send Template For Signing". Below the title, there are tabs for "BUILD", "TEST", and "MONITOR". The main workspace shows a workflow timeline with two steps: "0 Initiate Workflow" and "1 DocuSign". The "Initiate Workflow" step contains a "Survey Listener" sub-step with the configuration "Survey Name: [DocuSign] Workflow Initiator Survey". The "DocuSign" step is connected to the "Initiate Workflow" step. The right-hand panel shows a "Steps" section with a search bar and a list of available steps: "Survey", "Survey Invite", "Send Email", "Delay", "If/Else Logic", and "Stop". Below the "Steps" section is a "Connections" section with a list of integrations: "Asana", "DocuSign", "Gladly", and "Microsoft Teams".

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.](#)

Configure Integration

PRIMARY SETUP

< Back

Select Action

Select the action you would like to perform.

Get envelope
Get an envelope from Docusign

Send template for signing
Send a Docusign template for signing

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".

Configure Action

PRIMARY SETUP LOGIC ADVANCED

< Back

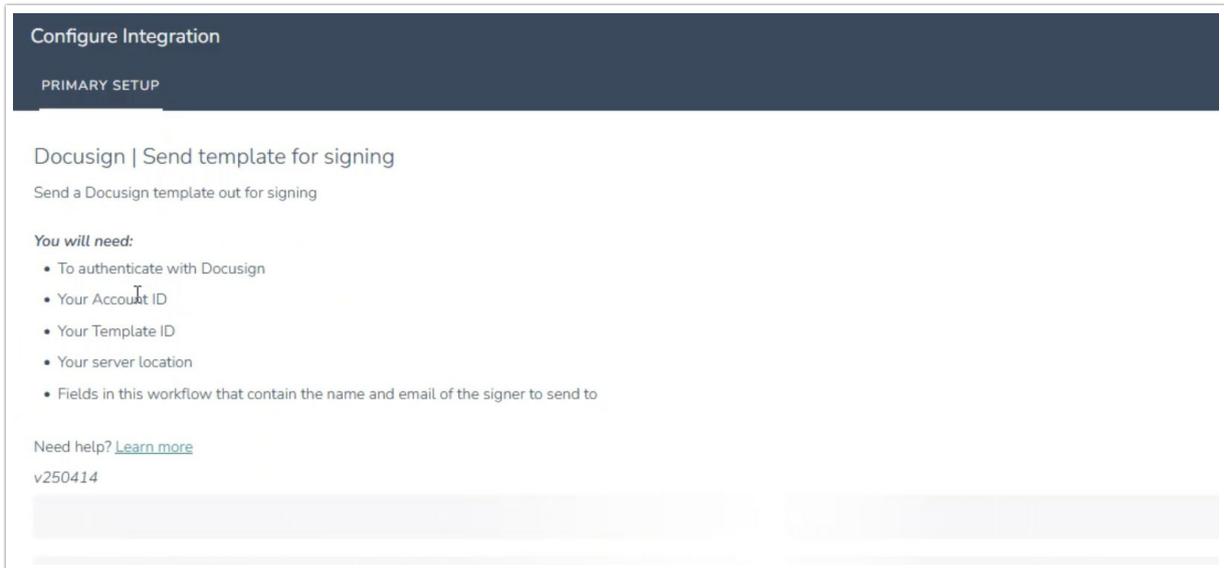
Select Action

Select the action you would like to perform.

Send template for signing
Send a Docusign template for signing

Get envelope
Get a Docusign envelope

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



The screenshot shows a dark blue header with the text "Configure Integration" and "PRIMARY SETUP" below it. The main content area is white and contains the following text: "DocuSign | Send template for signing", "Send a DocuSign template out for signing", "You will need:" followed by a bulleted list: "• To authenticate with DocuSign", "• Your Account ID", "• Your Template ID", "• Your server location", and "• Fields in this workflow that contain the name and email of the signer to send to". Below the list is a link "Need help? [Learn more](#)" and the version number "v250414". At the bottom, there are two light gray buttons, one of which is partially obscured by a white bar.

3. Authenticate with DocuSign



The screenshot shows a dark blue header with the text "Configure Action" and "PRIMARY SETUP", "LOGIC", and "ADVANCED" below it. The main content area is white and contains the following text: "DocuSign | Authentication", "Authenticate with DocuSign", and a dropdown menu. The dropdown menu is open and shows a yellow DocuSign logo, the text "DocuSign connected", and "Justin's DocuSign" with a downward arrow and a three-dot menu icon to its right.

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*

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 SETUP LOGIC ADVANCED

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*

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 SETUP LOGIC ADVANCED

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 Integration

PRIMARY SETUP

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

Use this Alchemer field	to match this DocuSign field
Step 0 Survey Listener Questions - [DocuSign] Workflow Initiator Survey ...	DocuSign name
Step 0 Survey Listener Questions - [DocuSign] Workflow Initiator Survey ...	DocuSign email

Add a new mapping

8. Click save.

Configure Integration

PRIMARY SETUP

DocuSign | Setup complete

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

A status code is available in the action metadata:

200: Successfully sent envelope.

400: Failed to send envelope.

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:

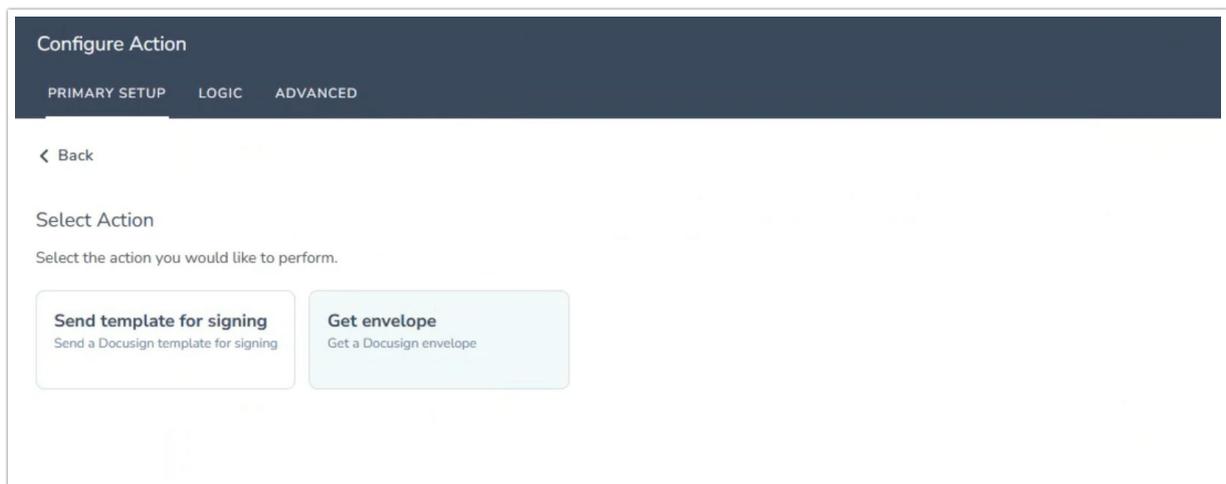
- Add Merge Codes to Email or Survey Invite steps.
- Use with Logic in the workflow.
- Use to personalize the survey in the workflow.

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.

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*

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 SETUP LOGIC ADVANCED

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*

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 SETUP LOGIC ADVANCED

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 workflow that contain the values you want to use to find the specific DocuSign envelope.

Configure Integration

PRIMARY SETUP

DocuSign | Find envelope

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

Use this Alchemer field to match this DocuSign field

Step 0 | Survey Listener Questions - Initiate Get Template | 1. Envelope ID (id: 2) DocuSign | envelopeid

Add a new mapping

8. Click "Save"

Configure Integration

PRIMARY SETUP

DocuSign | Setup complete

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

A status code is available in the action metadata:
 200: A DocuSign envelope was successfully found.
 400: The external integration returned an error.

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