DOX42 DOCUSIGN ACTION

DOCUMENTATION

Version 4.6.1.4

dox42

DOCUSIGN ACTION

Content

1 What is the dox42 DocuSignAction

The dox42 DocuSignAction is a dox42 Custum Output Action to automatically and directly send generated documents to DocuSign (www.docusign.com) for digital signing.

The dox42 DocuSignAction needs to be installed seperatly on your dox42 Server.

The DocuSignAction is automatically deployed on your **dox42 Online Service**.

The generated document will be sent per email to the intended signer as attached PDF.

2 Installation of dox42 DocuSignAction for perpetual dox42 Server

In order to use the DocuSignAction on the dox42 Server, please copy the following Assemblies in the /Bin directory of your Server:

- ✔ DocuSignAction42.dll

Now DocuSignAction has to be registered in the **web.config** of your server.

```
<customOutputActions>
        <add key="DocuSignAction42.DocuSignAction" value="DocuSignAction;c:\dox42Server\bin\DocuSignAction42.dll"/>
 </customOutputActions>
```

Please note:
In case you are using **dox42 Online:** The DocuSignAction42.dll is already deployed in your instance!

3 DocuSign Fields

The following fields from DocuSign are available as tags:

Fields	Tags
Signature	$$Signer1$$ $$Signer2$$
Date Signed	$$Date$$ $$Date2$$
Name	$$Name1$$
Email Address	$$Email1$$
Company	$$Company1$$
Title	$$Title1$$
Text	$$Textbox$$
Checkbox	$$Checkbox$$

Within the document, please use the tags e.g. **$$Signer1$$** and **$$Date$$** to indicate where the signer should put his signature and where the date should be inserted.

You can use white font color to hide the tags.

In case of several Signer use**: $$Signer2$$ and $$Date2$$:**

Restrictive Covenant

On leaving the company, I agree not to undertake provision of the same services/products as supplied by the Company either from my own business, or the employment of a competitor to the Company, for a period of two years, unless this is specifically agreed by the Company. The Company will only enforce that which is reasonable to protect its business.

Special Agreement

[SpecialAg...]

I accept this appointment on the terms and conditions stated above.

Signature $$Signer1$$ $$Signer2$$

_____

[Title]

|

Date signed $$Date$$ $$Date2$$

_____

We are looking forward to a great cooperation with you!

Yours sincerely, the dox42 Team

4 Parameters

Download dox42 Server Designer: https://www.dox42.com/de/Modules/Download

To use the DocuSignAction in the dox42 Server call use the Action Name: **DocuSignAction42.DocuSignAction** or create call with the dox42 Server Designer (red means mandatory).

Parameter name	Requirement	Effect
DocuSignCredentialsUser	mandatory	The DocuSign user name (normally the email)
DocuSignCredentialsPassWord	mandatory	The DocuSign password, since 2023 this is a general app password, instead of a user password.
RecipientEMail	mandatory	The intended signer's email (**In case of several signer:** list them and use a semi colon (;) between the signer's email addresses)
RecipientName	mandatory	The intended signer's name (**In case of several signer:** list the names and use a semi colon (;) between the signer's names)
EmailHeader	mandatory	
EmailBody	mandatory	
DocuSignAccountID	optional	The DocuSign Account ID. **Only for Demo Environment = DocuSign Sandbox** (please see screenshots below how to find the DocuSign Account ID in the Sandbox environment
DocumentFileName	mandatory	The name of the document, e.g. Contract_<%Customer.Name%>.pdf
Environment	optional	Demo | Prod; Default=Demo.

Use a free **DocuSign Demo Sandbox** for testing in case you do not have a prod account.

How to find the **DocuSignAccountID** in your DocuSign Sandbox environment:

5 Screen Shots of a Sample Application

Template design:

Integration of DocuSign tags:

Integrated service call (e.g. from dox42 SharePoint Online app):

DocuSign signing process:
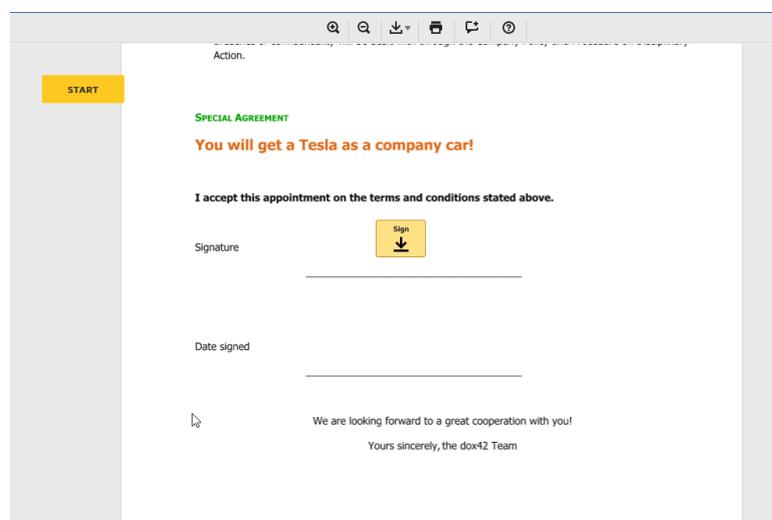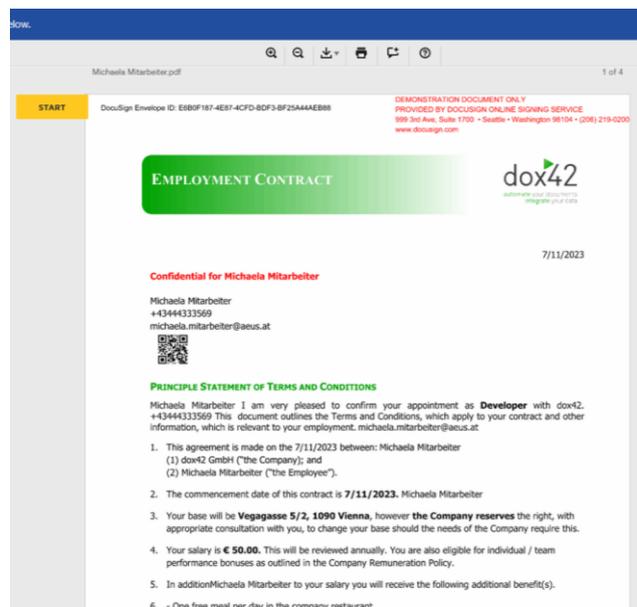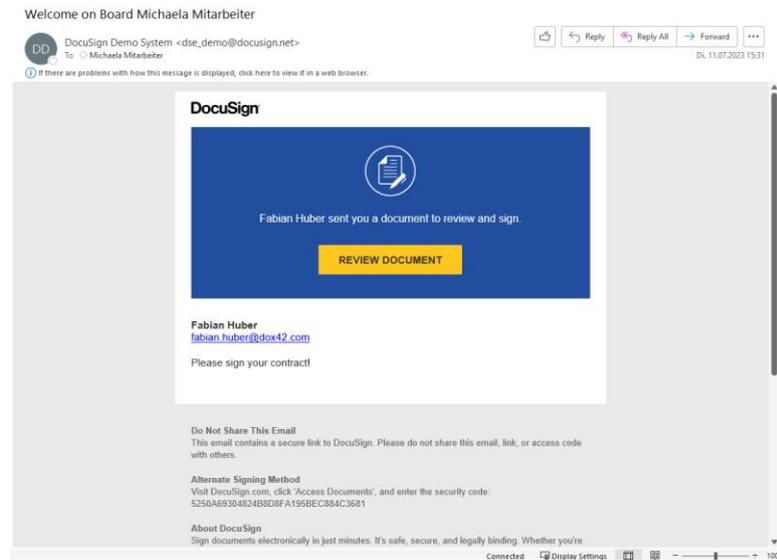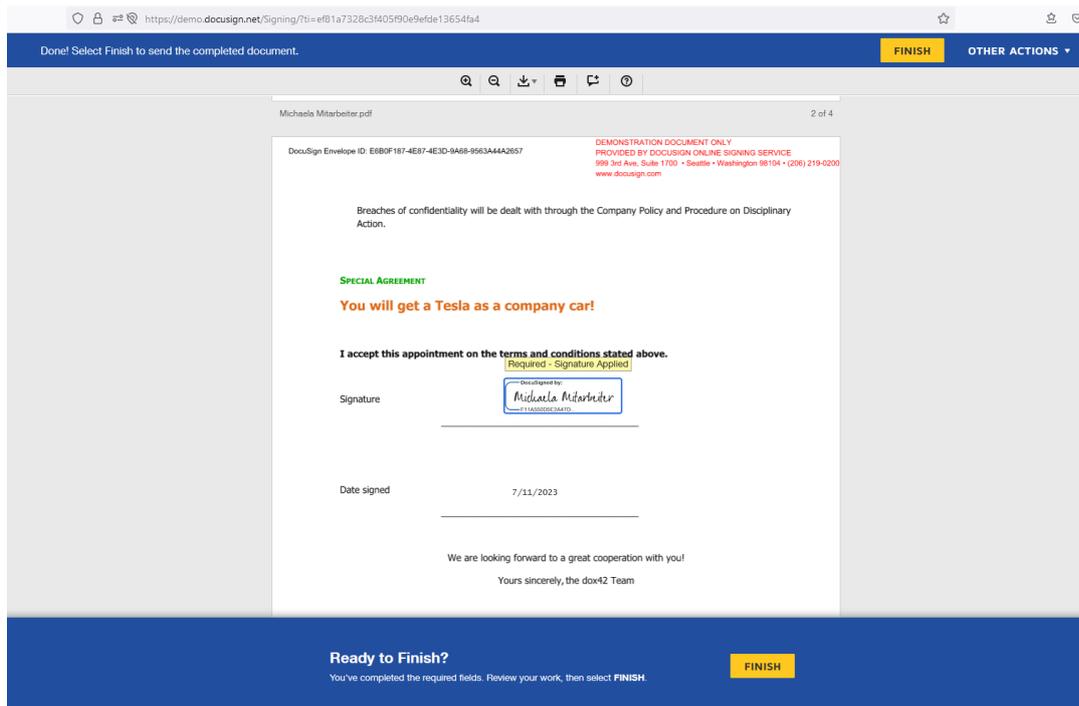
6 Support

For more Information about DocuSign, please visit: www.docusign.com

Please also see the dox42 Server Documentation as well:

Should you have any questions, please do not hesitate to contact support@dox42.com