

DOX42 DOCUSIGN ACTION

DOCUMENTATION

Version 4.6.1.4



dox42

DOCUSIGN
ACTION

dox42 GmbH | Vegagasse 5/2, A-1190 Vienna
IBAN: AT571420020010936536 | BIC: BAWAATWW | Handelsgericht Wien | FN: 393153 t | UID: ATU67845433

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1 What is the dox42 DocuSignAction

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

The **dox42** DocuSignAction needs to be installed separately 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).

The screenshot shows the dox42 Server Designer interface. The top toolbar includes various actions like Add Call, AzureAD Login, SharepointAction, SaveAction, EMailAction, ReturnAction, PrintAction, SQLAction, DocuSignAction, CRMAction, Clone, Up, Down, and Delete. The main workspace shows a call configuration for 'Call - Call 1' with the following parameters:

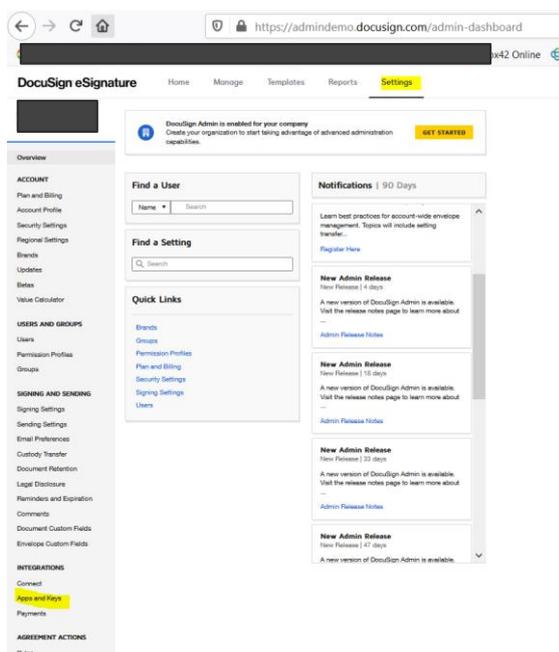
Parameter	Value
DocuSignCredentialsUser	YourDocuSignUsername
DocuSignCredentialsPassWord	XXXXXX-> CryptoDataSource
RecipientEMail	<%Customer.Email%>
RecipientName	<%Customer.Name%>
EmailHeader	Your Document
EmailBody	Welcome on Board!
DocuSignAccountID	
DocumentFileName	Contract_%Customer.Name%.pdf
Environment	Prod

Below the table, there is a text box containing the instruction: "Send generated documents via DocuSign for signing". At the bottom of the interface, there are fields for 'Call Service' and 'REST URL', along with an 'Open file' button.

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:



DocuSign eSignature Home Manage Templates Reports **Settings**

Overview

ACCOUNT

- Plan and Billing
- Account Profile
- Security Settings
- Regional Settings
- Brands
- Updates
- Betas
- Value Calculator

USERS AND GROUPS

- Users
- Permission Profiles
- Groups

SIGNING AND SENDING

- Signing Settings
- Signature Settings

Apps and Keys

Developers building DocuSign integrations must first create and configure an app, which specifies an integration key, secret keys, and other make API calls, whether calling an API directly or using an SDK. The apps and keys listed on this page can be created manually, or autom

My Account Information

API Username
[Redacted]

API Account ID
[Redacted]

Account's Base URI
[Redacted]

Apps and Integration Keys

App Name	Integration Key
No Integration Keys	

5 Screen Shots of a Sample Application

Template design:

The screenshot shows a DocuSign template editor interface. The main document is an "EMPLOYMENT CONTRACT" dated 7/11/2023. It includes a "Confidential for" field and a "PRINCIPLE STATEMENT OF TERMS AND CONDITIONS" section. The document contains several data fields (indicated by blue bars) for personalization, such as EmployeeID, Title, Email, Phone, Position, Salary, ID, Modified, Created, ModifiedBy, Version, Attachments, LURLPath, ItemCount, FolderChildCount, Labelsetting, RetentionLabel, RetentionLabelApplied, LabelAppliedBy, and AppCreatedBy. A sidebar on the right titled "dox42 Data Fields" lists these fields with a search filter and a "Type" dropdown. The bottom status bar shows "Page 2 of 4", "528 words", "3304 characters", and "English (United States)".

Integration of DocuSign tags:

The screenshot shows a Microsoft Word document with several DocuSign tags. A red box highlights the tag `$$Signer1$$` next to the word "Signature". Another red box highlights the tag `$$Date$$` next to the text "Date signed". A white box with black text says "Hide DS tags with white font color". To the right, the "dox42 Data Fields" pane is open, showing a list of fields such as EmployeeID, Title, Email, Phone, Position, etc.

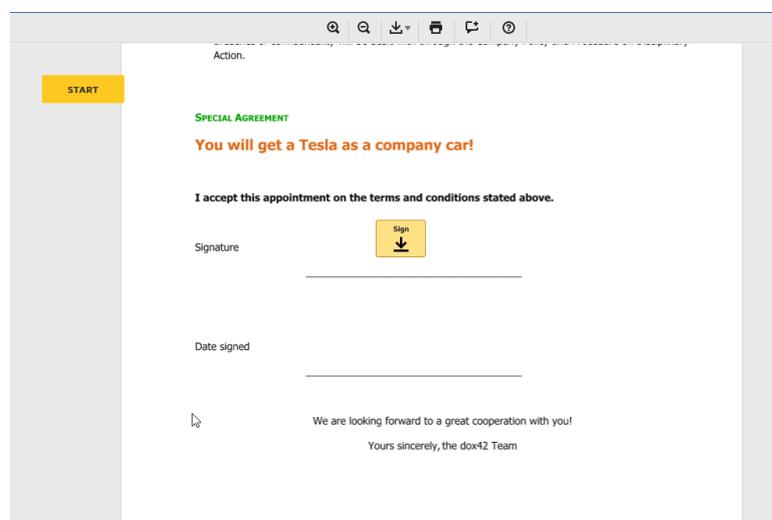
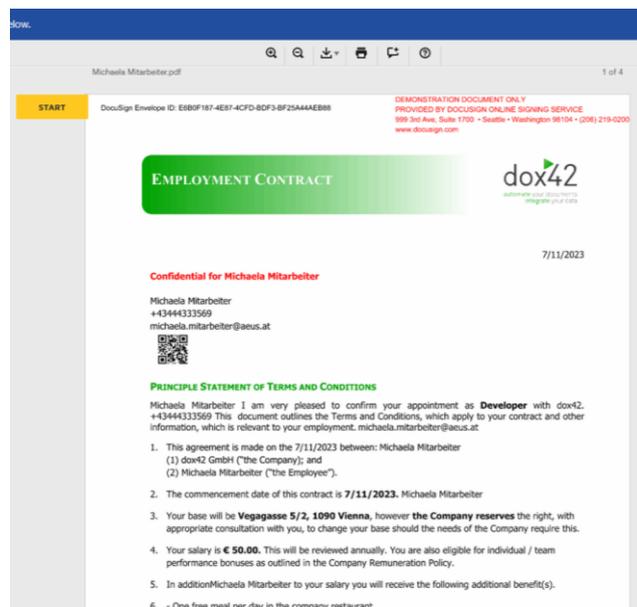
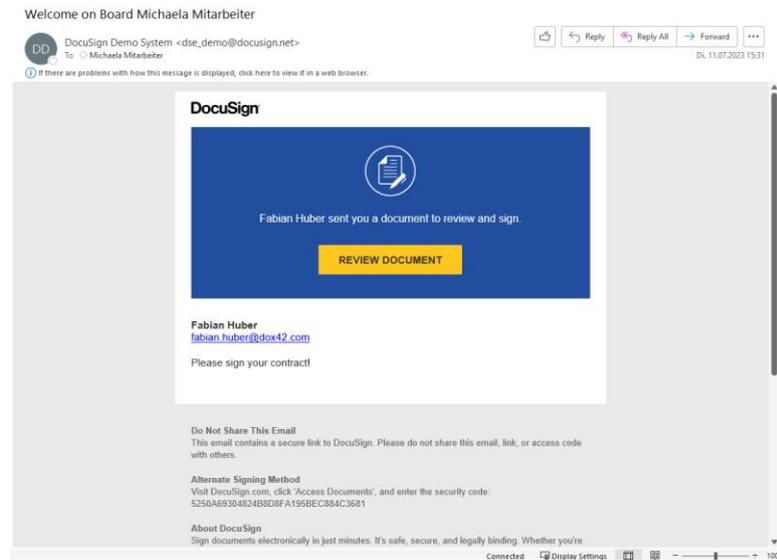
Integrated service call (e.g. from dox42 SharePoint Online app):

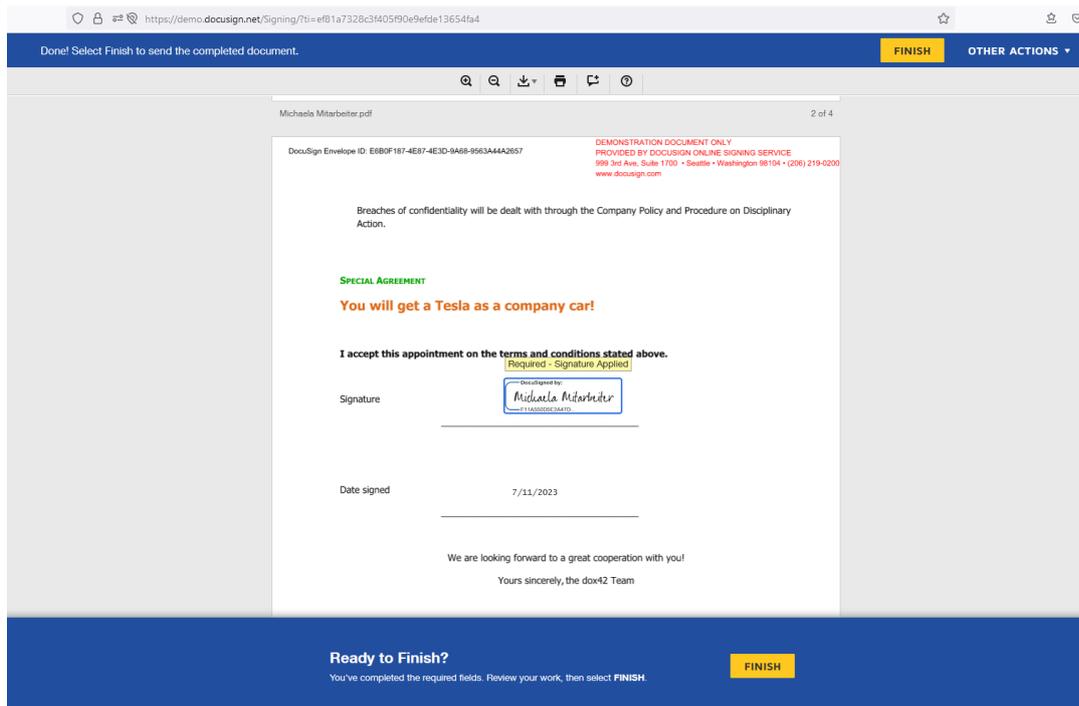
The screenshot shows the SharePoint Online interface for a list named "Modern EmployeeContracts". The list contains entries with columns for Title and Email. A dialog box titled "Please choose a template ..." is overlaid on the screen, with the following options:

- Save PDF Employee Contracts
- Open as PDF
- Send Employee Contract
- Open Mail Draft
- Send via DocuSign
- Save Word Employee Contracts
- Employee Contract Bulk_ohne AAD
- Open as PDF via Azuro

The dialog box has "Cancel" and "OK" buttons at the bottom.

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