



DocuSign Setup Guide

FireLight

firelight

DOCUSIGN SETUP GUIDE

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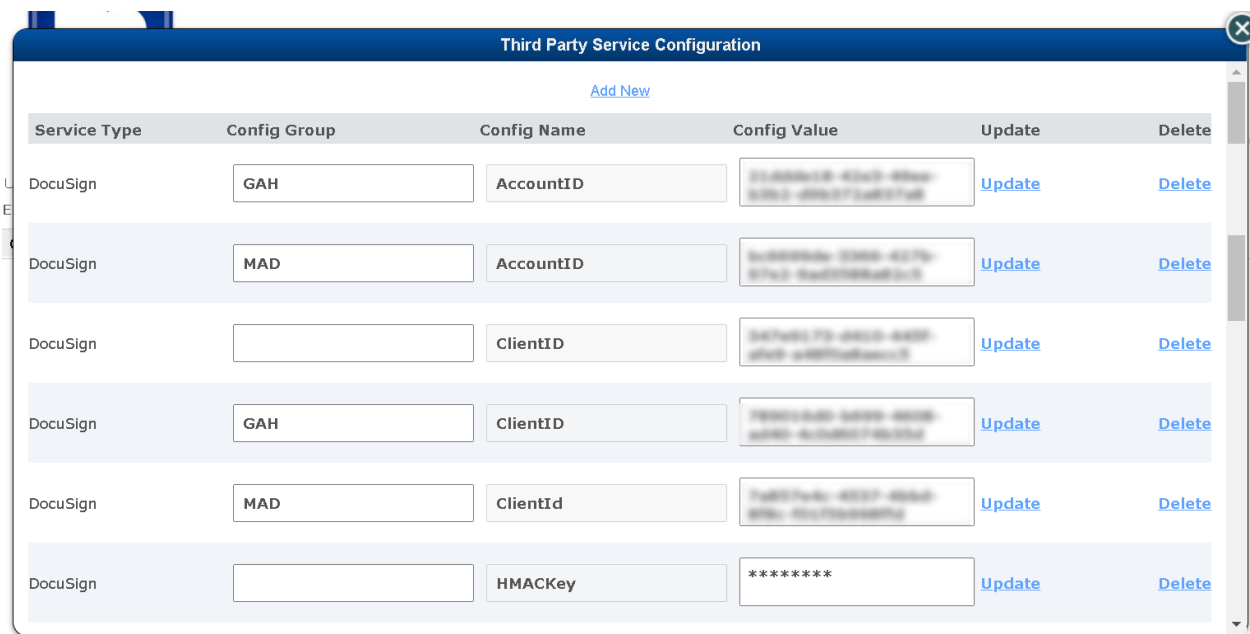
DocuSign Setup Guide

The following document will go through the step-by-step process in setting up and configuring the DocuSign integration. Each step will need to be taken in order to ensure that your account is set up correctly with FireLight®.

1. Third Party Configuration

To utilize DocuSign within FireLight, each client will need several pieces of information that will be added to the Third Party Configuration Table. This will ensure that all of the proper information will be added to the DocuSign envelope in order for each signer to show up appropriately within DocuSign.

Under the Organization Settings, in the Admin tab, select the Third Party Configuration hyperlink. A table will appear with any third party configurations that are set up.



The screenshot shows a web interface titled "Third Party Service Configuration". At the top right is a close button (X). Below the title is a blue "Add New" link. The table has six columns: Service Type, Config Group, Config Name, Config Value, Update, and Delete. There are six rows of configuration data for DocuSign.

Service Type	Config Group	Config Name	Config Value	Update	Delete
DocuSign	GAH	AccountID	XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX	Update	Delete
DocuSign	MAD	AccountID	XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX	Update	Delete
DocuSign		ClientID	XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX	Update	Delete
DocuSign	GAH	ClientID	XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX	Update	Delete
DocuSign	MAD	ClientID	XXXXXXXX-XXXX-XXXX-XXXX-XXXXXXXXXXXX	Update	Delete
DocuSign		HMACKey	*****	Update	Delete

To add a new config value click “Add New”



This screenshot is similar to the previous one but highlights the "Add New" link. A red arrow points from the text "Click Here" to the "Add New" link.

Service Type	Config Group	Config Name	Config Value	Update	Delete
--------------	--------------	-------------	--------------	--------	--------

The table will expand for the user to enter the new credentials.

Config Name	<input type="text"/>
Config Value	<input type="text"/>
Config Group (Optional)	<input type="text"/>
Service Type	<input type="text" value="DocuSign"/>

The user will need to add config values for "AccountID" "ClientID" "HMACKey" and "RSAPrivateKey". These listed Names will go in the Config Name field. The values will be pulled from the DocuSign's admin page.

The Config Group will allow the user to have multiple DocuSign accounts attached, which will be determined by the DataItem "FLI_THIRDPARTY_CONFIG_GROUP". This dataitem is an optional field, and defaults as blank. The service type for all DocuSign services, will be "DocuSign".

2. Apps and Keys




In the DocuSign Admin, the user will need to locate integrations/App and Keys.

Apps and Keys

When building a DocuSign integration, you must first create an app and integration key. This key is required to call any DocuSign API, either directly or by using an SDK.

Create apps and keys manually or edit keys created automatically for you by [Quickstart](#).

^ My Account Information




User ID	API Account ID	Account Base URI
<div></div>	<div></div>	<div></div>

Within the Apps and Keys section, the user will be able to find 2 of the 5 config values needed to use the DocuSign service. They are listed below:

2.1 UserId

The UserID will go into the config name "UserId". You can select the copy button below to copy to the userID section in the Third Party Configuration Table.




^ My Account Information

User ID	API Account ID	Account Base URI
<div> ← Click Here</div>	<div></div>	<div></div>

2.2 AccountID

The API Account ID will go into the config name "AccountID". You can select the copy button below to copy to the API Account ID section in the Third Party Configuration Table.

My Account Information

User ID	API Account ID	Account Base URI
 [blurred]	 ← Click Here [blurred]	 [blurred]

3. Add App and Integration Key

In the DocuSign Admin, go to “integrations/App and Keys” and click the Add App and Integration Key.

Apps and Keys


When building a DocuSign integration, you must first create an app and integration key. This key is required to call any DocuSign API, either directly or by using an SDK.

Create apps and keys manually or edit keys created automatically for you by [Quickstart](#).

My Account Information

User ID	API Account ID	Account Base URI
[REDACTED]	[REDACTED]	[REDACTED]

Apps and Integration Keys

Click Here 

ADD APP AND INTEGRATION KEY

App Name	Integration Key	Status	
Quickstart App-1	[REDACTED]	<input checked="" type="radio"/> Demo	ACTIONS ▾

1

108

14

Applications Successful Requests Failed Re

Average Response Time over last 10 days

Average Response

90th Percentile

6000

4000

per 60 min

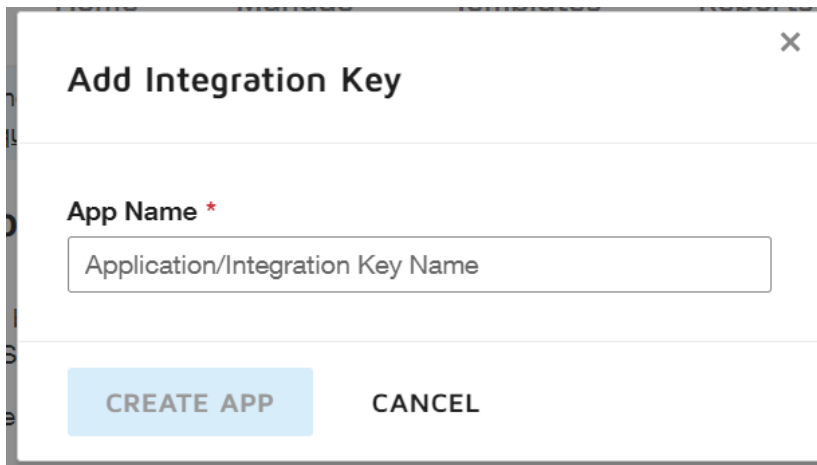
per 60 min

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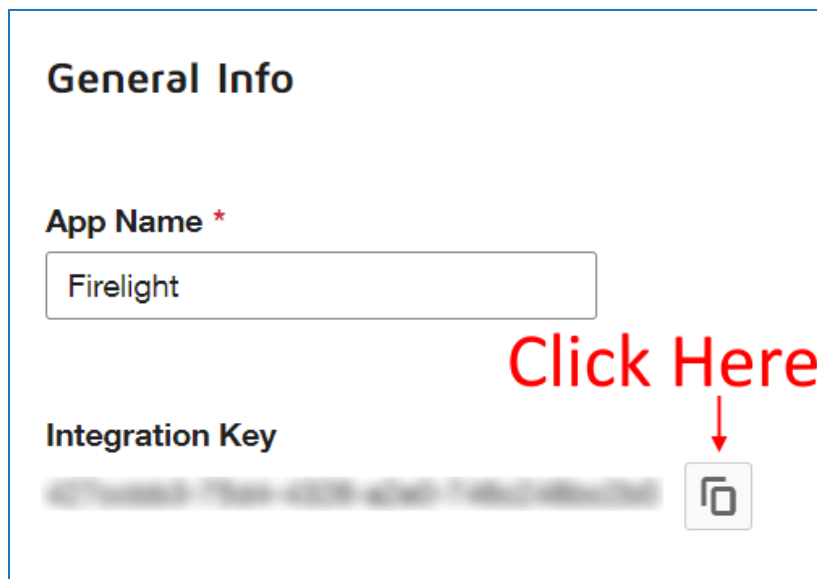
Add in "Firelight" for the App Name.



A dialog box titled "Add Integration Key" with a close button (X) in the top right corner. It contains a label "App Name *" followed by a text input field containing the placeholder text "Application/Integration Key Name". At the bottom, there are two buttons: "CREATE APP" (highlighted in light blue) and "CANCEL".

3.1 ClientID

After the Integration Key has been created, the user will be able to view it. This will need to be copied in order to add to the third party configuration table.



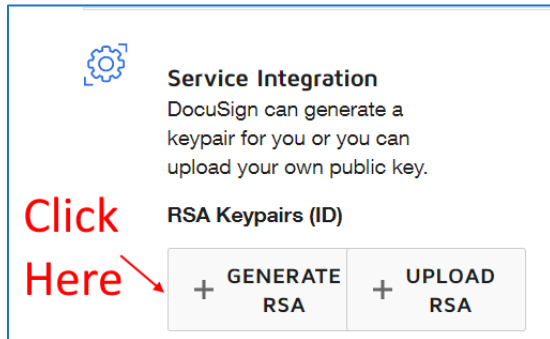
A form titled "General Info" with a close button (X) in the top right corner. It contains a label "App Name *" followed by a text input field containing the text "Firelight". Below this is a label "Integration Key" followed by a blurred text field. To the right of the blurred field is a copy icon (two overlapping squares). A red arrow points from the text "Click Here" to the copy icon.

This value will be "ClientID" in the third party config, which can be added to the Third Party Configuration table.

3.2 RSAPrivateKey

To access the RSAPrivateKey, there are two options; the user can upload their own key or create a new one.

To generate a new key, click "Generate RSA".




Click the copy button for the private key:

RSA Keypair

This keypair is used for JSON Web Token (JWT) authentication and is only valid for the environment in which it is generated.

Keypair ID:


ed302885-6c75-42de-a1e6-249fae7ebd4c

 Copy both of these keys to a safe location, they will not be displayed again.

Public Key

-----BEGIN PUBLIC KEY-----


```
-----BEGIN PUBLIC KEY-----
MIIBIjANBgkqhkiG9w0BAQEFAAOCAQ8AMIIBCgKCAQEA
-----END PUBLIC KEY-----
```



Private Key

-----BEGIN RSA PRIVATE KEY-----

```
-----BEGIN RSA PRIVATE KEY-----
MIIEowIBAAKCAQEA
-----END RSA PRIVATE KEY-----
```


↑
Click Here

CLOSE

This can be added to the FireLight third party configuration with the Config name: "RSAPrivateKey".

4. Connect

In the DocuSign Admin, navigate to Integrations/Connect:

Connect

DocuSign Connect is a push service that sends real-time data updates to external applications.

i Try Recipient Connect. Receive real-time events, details, and documents for **incoming** DocuSign envelopes.
[Request Early Access.](#)

DISABLE CONNECT

CONNECT KEYS PUBLISH LOGS FAILURES ADD CONFIGURATION ▼

Name ▲	Configuration ID	Status	Failures
DEV	10207889	● Active	0

ACTIONS ▼

If Connect is not enabled, click Enable Connect.

4.1 HMACKey

To get the HMACKey, click the Connect Keys Button.

DISABLE CONNECT

Click Here → CONNECT KEYS PUBLISH LOGS

The only available access to the HMAC key is to generate a new one. To generate, click “Add Secret Key”.

Connect Authentication - Keys.' At the bottom is a button '+ ADD SECRET KEY' with a red arrow pointing to it from the text 'Click Here'."/>

Connect Keys

Protect your custom Connect configurations with enhanced security by enabling Connect keys. Connect keys can ensure that a push notification has been sent by DocuSign and hasn't been tampered with by any other party.

You can generate multiple keys to use with your custom Connect configurations. This allows you to rotate keys as needed without causing a lapse in protection.

For more information, see [Connect Authentication - Keys](#).

+ ADD SECRET KEY ← Click Here

Upon clicking, the HMAC key will appear. You will need to double click on the key to highlight it, and then press Ctrl C to copy it into the clipboard.

NOTE: If you navigate away from this screen before copying the key, you will need to generate a new key in order to copy it.

Connect Keys

Protect your custom Connect configurations with enhanced security by enabling Connect keys. Connect keys can ensure that a push notification has been sent by DocuSign and hasn't been tampered with by any other party.

You can generate multiple keys to use with your custom Connect configurations. This allows you to rotate keys as needed without causing a lapse in protection.

For more information, see [Connect Authentication - Keys](#).

Key 1

×

iLoYsO6MG5nMg

Double Click then Ctrl-C

+

ADD SECRET KEY

This value can be added to the third party config table with the name "HMACKey".

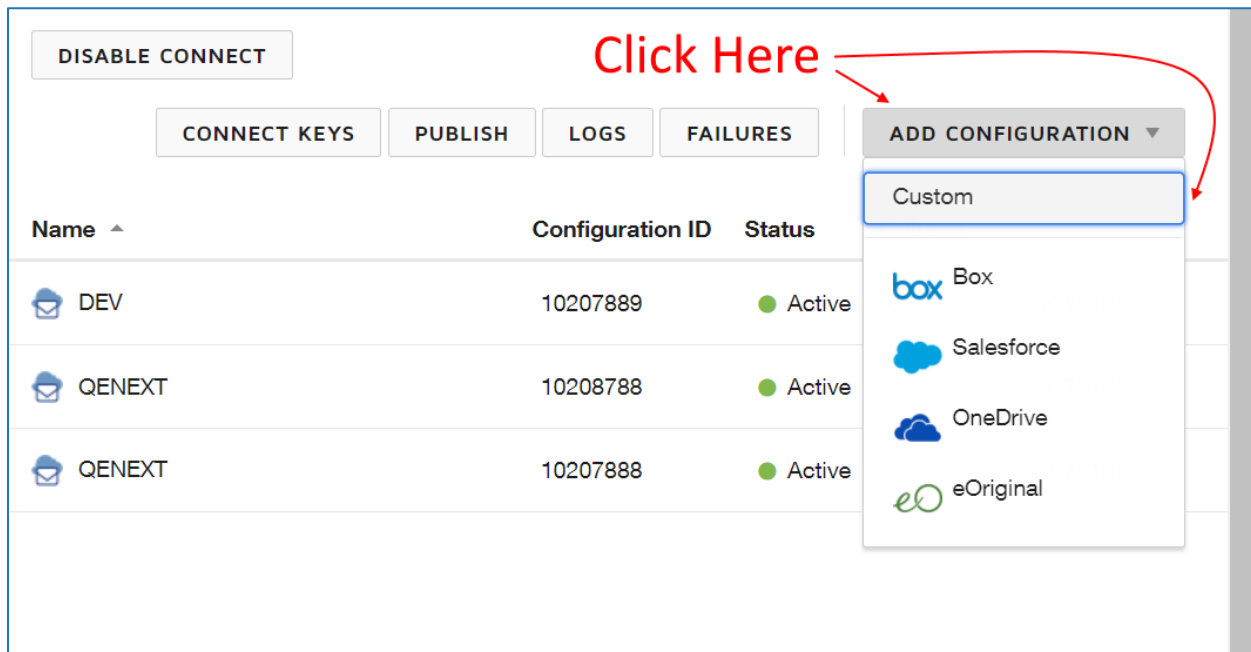
4.2 Connect Config

The user will need to return to the Integrations/Connect so the configuration can be connected.

The Connect Configuration is needed to allow DocuSign to call back to FireLight when an envelope has been completed.

NOTE: A configuration will need to be added for each environment that will be conducting testing.

To add this configuration, click ADD CONFIGURATION, then click Custom:



The settings will need to be changed in the Configuration to associate it with FireLight.

- The Name is the environment it will be pointing to. (i.e., QE Next, QE, UAT, etc.)
- The URL to Publish (HTTPS required) will have to be the path to the connect API in FireLight, which are listed below:
 - **QE NEXT:**
<https://firelight.insurancetechnologies.com/EGAppNext/api/DocuSign/ConnectHook>
 - **QE:**
<https://firelight.insurancetechnologies.com/EGApp/api/DocuSign/ConnectHook>
 - **UAT NEXT:**
<https://uat.firelighteapp.com/EGAppNext/api/DocuSign/ConnectHook>

- **UAT:** <https://uat.firelighteapp.com/EGApp/api/DocuSign/ConnectHook>
- **Prod:** <https://www.firelighteapp.com/EGApp/api/DocuSign/ConnectHook>

Custom Configuration Settings


SAVECANCEL

System Settings

● ACTIVE CONNECTION ▾

Configuration ID: 10207888

Name

QENEXT 

URL to Publish (HTTPS required)

<https://firelight.insurancetechnologies.com/EGAppNext/api/DocuSign/ConnectHook>

☒ Enable Log (maximum 100)

☒ Require Acknowledgement

Next, verify the following settings are as shown below:

Data Format

REST v2.1 ▼

This cannot be changed once the configuration is saved.

Include Data:

- ☒ Custom Fields
- ☐ Documents
- ☐ Attachments
- ☐ Extensions
- ☐ Folders
- ☒ Recipients
- ☐ Powerform
- ☐ Tabs
- ☐ PaymentTabs

JSON Payload

```
{  "status":  "emailSub  "emailBlu  "envelope  "signingI  "enableWe  "allowMar  "allowRea  "createdD  "lastModi  "statusCh  "useDiscl  "sender":  {    "user    "user    "acco    "emai  },  "recipien  "sign  {
```


Additionally, verify these settings are set the same as well:

Associated Users

☒ All users (includes new users)
☐ Select users to include

Trigger Events

Envelope Events:

☐ Envelope Sent
☐ Envelope Delivered
☒ Envelope Signed/Completed
☒ Envelope Declined
☒ Envelope Voided

Recipient Events:

☐ Recipient Sent
☐ Recipient Delivery Failed
☒ Recipient Delivered
☒ Recipient Signed/Completed
☒ Recipient Declined
☐ Recipient Authentication Failure

Integration and Security Settings

☒ Include HMAC Signature -
Recommended - Use a hash to
verify message authenticity.
What's this? ▼

☐ Include Basic Authentication
Header
- Add a username and password to
the header to verify message
authenticity.

Other Settings:

☐ Use SOAP Interface (SOAP
Method:
DocuSignConnectUpdate)

☐ Enable Mutual TLS

Then Save.

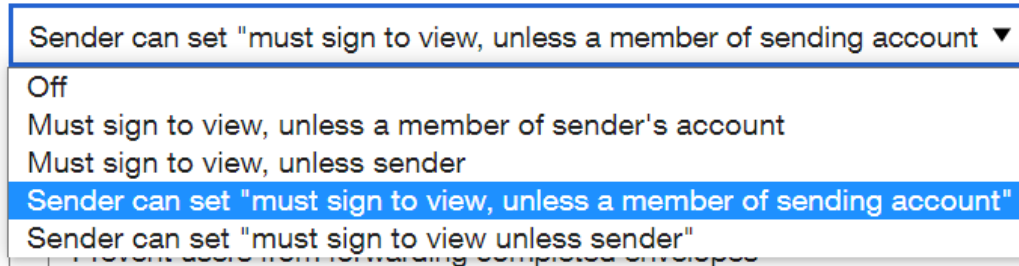
5. Document Visibility

To ensure that FireLight's rules for form protection are honored, please set the following setting below:

In "Signing and Settings/Sending Settings", find "Document Visibility" and set it to:

"Sender can set "must sign to view, unless a member of sending account"

Document Visibility:

A screenshot of a dropdown menu for "Document Visibility". The menu is open, showing several options. The option "Sender can set 'must sign to view, unless a member of sending account'" is highlighted in blue. Other visible options include "Off", "Must sign to view, unless a member of sender's account", "Must sign to view, unless sender", and "Sender can set 'must sign to view unless sender'".

Sender can set "must sign to view, unless a member of sending account" ▼
Off
Must sign to view, unless a member of sender's account
Must sign to view, unless sender
Sender can set "must sign to view, unless a member of sending account"
Sender can set "must sign to view unless sender"

Then click Save on the top or bottom of the page.