eSignature Integration with Conga Platform

Contents

About Conga eSignature Integration with Conga Platform

An eSignature or electronic signature is an efficient and legal way to get electronic documents signed quickly. Conga eSignature integration enables you to electronically sign any type of document associated with contracts. It offers the ability to integrate third party eSignature services with Conga Platform. You can connect and setup Conga Sign, Adobe Sign, DocuSign, OneSpan Sign, Sertifi, and wet signature to send documents for eSignature.

Conga eSignature integration provides a streamlined point-and-click way for sending documents for eSignature when it comes to acquire final approvals for a contract. Within the contract, the send for eSignature feature allows you to significantly shorten approval cycles by quickly compiling the necessary documents, selecting the right contacts from your org and easily sending personalized emails. As documents are routed, Conga eSignature integration ensures that documents adhere to the appropriate workflows. When documents are signed by all the signers, the contract status is automatically updated inside your org, and final signed documents are attached to the contract. With Conga eSignature integration, you have a fully secure, auditable, and trackable view of who has approved your documents for contracts.

What's New in Conga eSignature Integration with Conga Platform

This section lists changes in the documentation to support each release.

202403.3.0

Document	Publication Date	Topic	Description
202403.3.0	18 Apr 2024	Conga eSignature Integration with Platform for Admins	Updated Topic.

June '23

Document	Publication Date	Topic	Description
June '23	07 Jun 2023	Conga eSignature APIs	Updated Topic.
		Sending Documents for eSignature with Adobe Sign Using the Conga eSignature API	New Topic.
		Sending Documents for eSignature with DocuSign Using the Conga eSignature API	New Topic.
		Sending Documents for eSignature with OneSpan Sign Using the Conga eSignature API	New Topic.

Document	Publication Date	Topic	Description
		Sending Documents for eSignature with Sertifi Using the Conga eSignature API	New Topic.

February '23

Document	Publication Date	Topic	Description
February '23	08 Feb 2023	All topics.	New Guide.

Conga eSignature Integration with Conga Platform for Administrators

This section explains how to set up Conga Sign, DocuSign and Adobe Sign as part of the Conga eSignature integration process. It describes the administrative tasks to be performed to enable the features and functionality of eSignature services.

Topic	Description
What's Covered	This section walks the administrator through the process of Conga eSignature integration administration. It provides conceptual information, and step-by-step instructions for Conga eSignature integration administrative tasks. This section describes the steps for configuring Conga Sign, DocuSign, and Adobe Sign.
Primary Audience	Contract Manager, Conga eSignature integration Administrator
IT Environment	Refer to the latest *Release Notes* for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, refer to What's New in Conga eSignature integration Documentation topic.
Other Resources	• *Conga eSignature Integration with Conga Platform for users*: Refer to this guide for detailed instructions on sending documents for eSignature.

Select one of the following topics for more information:

Setting Up Conga Sign on page 6
Setting Up Adobe Sign on page 6
Setting Up DocuSign on page 9
Setting Up OneSpan Sign on page 12

Setting Up Conga Sign

This topic explains the steps to integrate and configure Conga Sign with Conga Platform.

Prerequisites

Contact Conga support to get the following information for your Conga Sign account:

- Client ID
- Client secret
- Scope
- Grant type
- Auth URL
- Base URL
- Conga Sign UI URL
- Callback key

To set up Conga Sign

1. Log in to Conga Platform.
2. Click the menu icon ( ) on the top right corner, and go to **Admin Settings**.
3. Click **Integrations**.
4. Navigate to the eSignature API Connections tab.
5. Under the Action column, click **Configure** for Conga Sign.
   The Conga Sign Setup page opens.
6. Enter the client ID, scope, grant type, client secret, auth URL, base URL, Conga Sign UI URL, and callback key.
7. Turn on the **Default Option for Signature** toggle button to make Conga Sign the default option while sending documents for eSignature.
8. Turn on the **Active** toggle button to make the Conga Sign option available for selection while sending documents for eSignature.

   Note:

   When the Default Option for Signature toggle button is turned on, you can not turn off the Active toggle button.
9. Click **Save**.

Conga Sign is configured in your org. To edit the configuration, click **Edit** under the Action column.

Setting Up Adobe Sign

Before you start the setup, you must have an Adobe Sign account. After creating an Adobe Sign account, perform the following tasks:

- Create an API application in Adobe Sign account
- Configure OAuth for an application in Adobe Sign account
- Update Send Settings in Adobe Sign account
- Configure Adobe Sign parameters in Conga Platform
- Configure webhook in Adobe Sign account

Creating an API Application in Adobe Sign

You must create an API application in your Adobe Sign account to integrate Adobe Sign with Conga Platform. The API application acts as a representative of a Conga Platform application, interacting with Adobe Sign platform.

To create an API application in Adobe Sign

1. Log in to your Adobe Sign account as an administrator.
2. Navigate to the Account tab.
3. Click**Acrobat Sign API** > **API Applications**.
4. Click Add icon (⊕) to add an API application.
5. Enter name and display name.
6. Select Customer in the Domain Name.
7. Click **Save**.

To get the client ID and client secrets, select the API application and click **View / Edit**.

Configuring OAuth for an Application in Adobe Sign

After creating an API application in your Adobe Sign account, configure OAuth for that application.

1. Log in to your Adobe Sign account as an administrator.
2. Navigate to the Account tab.
3. Click**Acrobat Sign API** > **API Applications**.
4. Select the relevant API application from the list.
5. Click **Configure OAuth for Application**.
6. Enter redirect URI: `{Conga Platform Instance Url}/congaadmin/integrations/details/AdobeSign`
7. Check the Enabled check-box for all scopes. Keep the account option in the Modifier field.
8. Click **Save**.

Updating Send Settings in Adobe Sign

To allow sender to mark some recipients as acceptors, perform the following steps:

1. Log in to your Adobe Sign account as an administrator.
2. Navigate to the Account tab.
3. Click **Account Settings** > **Send Settings**.
4. Select *Allow senders to mark some recipients as acceptors* check-box.
5. Click **Save**.

Configuring Adobe Sign Parameters in Conga Platform

This topic explains the steps required to integrate Adobe Sign with Conga Platform.

Prerequisites

- The following information from your Adobe Sign account:
  - Adobe Sign auth server
  - Adobe Sign client ID
  - Adobe Sign client secret

To set up Adobe Sign

1. Log in to Conga Platform.
2. Click the menu icon ( ) on the top right corner, and go to **Admin Console**.
3. Click **Integrations**.
4. Navigate to the eSignature API Connections tab.

5. Under the Action column, click **Configure** for Adobe Sign.
   The Adobe Sign Setup page opens.
6. Enter the following details:

Field Name	Description
Adobe Sign AuthServer	To get the Adobe Sign auth server, log in to Adobe Sign as an administrator and copy the domain link from the home page (for example, https://###.###.adobesign.com). Add the domain link to the Adobe Sign AuthServer field.
Adobe Sign Client ID	To get the client ID, log in to Adobe Sign as an administrator, go to Acrobat Sign API > click **API Applications**, select the required API Application > click **View/Edit**, and enter the application ID value in the Adobe Sign Client ID field.
Adobe Sign Client Secret	To get the client secret, log in to Adobe Sign as an administrator, go to Acrobat Sign API > click **API Applications**, select the required API Application > click **View/Edit**, and enter the client secret value in the Adobe Sign Client Secret field.

7. Turn on the **Retrieve as Combined Document** toggle button to enable the generation of a single PDF document containing all documents that were signed during the eSignature process.
8. Turn on the **Default Option for Signature** toggle button to make Adobe Sign the default option while sending documents for eSignature.
9. Turn on the **Active** toggle button to make the Adobe Sign option available for selection while sending documents for eSignature.

   Note:

   When the Default Option for Signature toggle button is turned on, you can not turn off the Active toggle button.
10. Click **Save**.
    You are redirected to the Adobe Acrobat Sign login page.
11. Enter email and password, and click **Sign In**.
12. Click **Allow** to grant consent.

After granting consent, you are redirected to the Adobe Sign setup page. Adobe Sign is configured in your org. To edit the configuration, click **Edit** under the Action column.

Note:

If you do not use Adobe Sign eSignature services in the Conga Platform for more than 60 days, the refresh token will expire. To generate a new refresh token, go to the Adobe Sign Setup page and click Save.

Configuring Webhook in Adobe Sign

A webhook is a user-defined HTTPS request that is triggered when a subscribed event occurs at the Adobe Acrobat Sign. When a subscribed event occurs, Acrobat Sign creates an HTTPS POST with a JSON body and delivers that to the URL specified. Webhook enables real-time notification of workflow events such as “signed” or “created” without the need to check Acrobat Sign for status; your app is automatically notified when an event occurs.

You must configure two webhooks in your Adobe Sign account:

- Webhook to receive notifications when your document is signed or declined.

- Webhook to receive notifications when your document is sent for signature.

To configure webhook in Adobe Sign

1. Log in to your Adobe Sign account as an administrator.
2. Navigate to the Account tab.
3. Click **Webhooks**.
4. Click Add icon (⊕) to add a new webhook.
5. Enter the name of the webhook.
6. Keep the Account option in the Scope field.
7. Enter Url: `{Conga Platform Instance Url}/api/esign/v1/webhook/adobesign`
8. Select Agreement in the Events, and then:
   a) Select *Agreement workflow completed* and *Agreement rejected* to receive notifications when your document is signed and declined, respectively.
   b) Select *Agreement sent* to receive notifications when your document is sent for signature.
9. In the Notification Parameters, select *Agreement Info*, *Agreement Document Info*, *Agreement Participant Info*, and *Agreement Signed Document* options.
10. Click **Save**.

Note:

If the Conga Platform Instance Url specified in the Url field is not active, Adobe Sign removes the configured webhooks. In this scenario, you must reconfigure webhooks in your Adobe Sign account.

Setting Up DocuSign

Before you start the setup, you must have a DocuSign account. After creating a DocuSign account, perform the following tasks:

- Create apps and keys in DocuSign account
- Configure DocuSign parameters in Conga Platform
- Configure webhook in DocuSign account

Creating Apps and Keys in DocuSign

In order to integrate DocuSign with the Conga eSignature service, you need to create an app and an integration key as follows:

1. Log in to your DocuSign account as an administrator.
2. Go to **Settings** > **Integrations** > **Apps and Keys**.
3. Click **Add App and Integration Key**.
4. Enter the app name, and click **Create App** button.
5. Copy the Integration Key to a notepad from General Info section.
6. Under the Authentication section, click **Add Secret Key** button. Copy the secret key to a notepad.
7. Under the Additional Settings section, click **Add URI**. Add URI: `{Conga Platform Instance Url}/congaadmin/integrations/details/DocuSign`
8. Click **Save**.

Note:

You need integration key, secret key, and redirect URL values to integrate the Conga eSignature service with DocuSign.

Configuring DocuSign Parameters in Conga Platform

This topic explains the steps required to integrate DocuSign with Conga Platform.

Prerequisites

The following information from your DocuSign Account:

- DocuSign admin user API ID
- DocuSign API account ID
- DocuSign auth server
- Integration key
- DocuSign account base URL
- DocuSign account ID
- Private key
- Public key

To set up DocuSign

1. Log in to Conga Platform.
2. Click the menu icon ( ) on the top right corner, and go to **Admin Console**.
3. Click **Integrations**.
4. Navigate to the eSignature API Connections tab.
5. Under the Action column, click **Configure** or **Edit** for DocuSign.
   The DocuSign Setup page opens.
6. Enter the following details:

Field Name	Description
DocuSign Admin User API ID	To get the DocuSign admin user API ID, log in to DocuSign as an administrator, go to Settings > Apps and Keys and enter the user ID value in the DocuSign Admin User API ID field.
DocuSign API Account ID	To get the DocuSign API account ID, log in to DocuSign as an administrator, go to Settings > Apps and Keys, and enter the API account ID value in the DocuSign API Account ID field.
DocuSign Auth Server	Enter https://account.docusign.com.
Integration Key	To get the integration key, log in to DocuSign as an administrator, go to Settings > Apps and Keys, and enter the integration key value in the Integration Key field.
DocuSign Account Base URL	To get the DocuSign account base URL, log in to DocuSign as an administrator, go to Settings > Apps and Keys, and enter the account base URI value in the DocuSign Account Base URL field.

Field Name	Description
DocuSign Account ID	To get the DocuSign Account ID, log in to your DocuSign account and, click your profile image in the upper-right corner. Your account number is under your name and/or org name in the drop-down menu. Copy and add it to DocuSign Account ID field.
Private Key and Public Key	To get the private and public Keys, see Creating Apps and Keys in DocuSign Account.

7. Turn on the **Retrieve as Combined Document** toggle button to enable the generation of a single PDF document containing all documents that were signed during the eSignature process.
8. Turn on the **Default Option for Signature** toggle button to make DocuSign the default option while sending documents for eSignature.
9. Turn on the **Active** toggle button to make the DocuSign option available for selection while sending documents for eSignature.

   Note:

   When the Default Option for Signature toggle button is turned on, you can not turn off the Active toggle button.
10. Turn on the **Admin Consent** toggle button to grant consent at the administrator level.
    a) Click **Save**.
    You are redirected to the DocuSign login page. Enter your email and password to log in.
    b) Select your organization, and click **Access**.
    c) Click **Allow Access** to grant consent.
11. Keep the **Admin Consent** toggle button turned off to grant the consent at individual level.
    a) Click **Save**.
    You are redirected to the DocuSign login page. Enter your email and password to log in.
    b) Click **Allow Access** to grant consent.

    Note:

    The following are the prerequisites to grant consent at administrator level:

    - Your account must include the Access Management with SSO feature. The administrative consent does not require that you install SSO, but you do need the product feature which includes SSO. For testing purposes, if your developer demo account does not include the feature, you can contact DocuSign at go-live@docusign.com and request that the feature be added to your account. Be sure to provide your Developer Demo Account ID.
    - You must claim your email DNS domain via the DocuSign administration tool. A domain can be claimed both by the DocuSign developer demo account and DocuSign production account.
    - Your users' email domains must match the claimed email domain.
    - Your integration keys management account must be one of the accounts in the DocuSign organization.

After granting the consent, you are redirected to the DocuSign setup page. DocuSign is configured in your org. To edit the configuration, click **Edit** under the Action column.

Configuring Webhook in DocuSign

Webhook notifies when certain triggering events occur in your eSignature workflows. For example, you can receive a notification whenever an individual recipient signs a document or when an envelope is fully signed and completed. To configure the webhook for DocuSign, you must set up OAUTH2.0 and add an application to your DocuSign account.

To set up OAUTH 2.0

1. Log in to your DocuSign account as an administrator.
2. Go to **Settings**. In the options menu on the left under Integrations, click **Connect**.
3. Navigate to the OAUTH 2.0 tab.
4. Enter the client ID, client secret, and authorization server URL.

   Note:

   Contact Conga support for the client ID, client secret, and authorization server URL.

To add an application

1. Navigate to the Applications tab.
2. Click **Add Configurations** and select **Custom** from the pull-down menu.
3. Enter the name of the application in the **Name** field.
4. Enter `{Conga Platform Instance Url}/api/esign/v1/webhook/docusign` in the **URL to Publish** field.
5. Select the following Envelope and Recipients triggering events:
   a. Envelope Sent
   b. Envelope Signed/Completed
   c. Envelope Declined
   d. Envelope Voided
6. In the Integration and Security Settings, select **Include OAuth (Recommended)**.
7. Click **Save Configuration**.

   Note:

   Keep the default options in the remaining fields.

Setting Up OneSpan Sign

Before you start the setup, you must have a OneSpan account. After creating a OneSpan account, create a client app in your account.

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Creating Client App in OneSpan

In order to integrate OneSpan with the Conga eSignature service, you need to create a client app as follows:

1. Log in to your OneSpan account as an administrator.
2. Navigate to the **Admin** tab.
3. Select API Access in the Integration field.
4. Click **Add**.
5. Enter an app name and click **Create**.
6. Copy the client ID and client secret to a notepad.
7. Click **Done**.

   Note:

   You need client ID and client secret key values to integrate the Conga eSignature service with OneSpan.

Conga eSignature Integration with Conga Platform for Users

This section explains how to use Conga Sign, DocuSign, and Adobe Sign to manage your electronic signatures automatically.

Topic	Description
What's Covered	This section walks the user through the entire process of sending documents for eSignature. It provides conceptual information, step-by-step instructions, and use cases for the features provided by Conga eSignature integration.
Primary Audience	• Sales Representative • Collaborator (such as a product owner, manager, factory manager)
IT Environment	Refer to the latest *Release Notes* for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this section for each release, see the What's New in Conga eSignature integration topic.
Other Resources	• *Conga eSigntaure Integration with Conga Platform for Administrators*: Refer to this guide for detailed instructions on how to set up Conga Sign, DocuSign, and Adobe Sign.

Select one of the following topics for more information:

Working with Conga Sign on page 13
Working with Adobe Sign on page 15
Working with DocuSign on page 17

Working with Conga Sign

This section describes how to send a document for eSignature as a sender, how to sign a document as a signer, and how to view a document after signing is completed. It covers the following topics:

Sending Documents for eSignature with Conga Sign on page 13
Signing a Document with Conga Sign on page 14
Viewing a Signed Document with Conga Sign on page 15

Sending Documents for eSignature with Conga Sign

After generating a contract document, you can use Cong Sign to send that document, along with any supporting documents for eSignature. In order to send documents for eSignature, you can use documents already attached to the record and select the documents from the list of available documents. You can select multiple documents for signing within a single request. Then, you select recipients, set the signing order, customize the subject and message of the email, and finalize the document in Conga Sign.

Prerequisite

A contract with:

- An In Signature status category
- A Ready for Signature status

To send a document for eSignature

1. Open the Contract record.
2. Click **Send for Signature**.
3. Select **CONGA SIGN** from the "Choose your sending option" popup.

   Note:

   - The Conga Sign option is automatically selected if you checked **Default Option for Signature** when configuring Conga Sign. For more information, see Setting up Conga Sign.
   - If only Conga Sign is active, the "Choose your sending option" popup does not appear, and a page opens to select the documents.
4. Click **Next** to open a page to add documents.
   a) Select the documents to send for eSignature from the Available Documents list. You can select multiple documents.
   b) To search for a document, enter the document name in the Search Documents box.
   c) To change the document's sequence, drag and drop them into the correct order using the Sequence icon ( ) on the left.
   d) To preview the document, click the More icon ( ) on document thumbnails, and then click **Preview**.
   e) To delete the document, click the More icon on document thumbnails, and then click **Delete**.
5. Click **Next** to open a page to add recipients.
   a) To add a name, search for contacts or internal users.
   After selecting a name, the email is automatically populated.
   b) Select **Signer Type** from the drop-down list.
   c) To add a new signer, click **Add Signer**.
   d) To delete a signer, click the Delete icon ( ).
   e) Check **Set Signing Order** to require recipients to sign the documents in a specific order. To change the signer's sequence, drag and drop them into the correct order using the Sequence icon ( ) on the left.

   Note: If **Set Signing Order** is not checked, the documents can be signed in any order.
6. Click **Next** to open a page to review and send the documents.
   a) Enter email subject and message for your recipients.
7. Click **Finalize**. This opens the documents inside the Conga Sign Console.
   a) Click the name of recipient in the RECEIPIENTS section, and drag-drop the required fields from the FIELDS section into your document.
   b) To access any specific page of the document, scroll through it using the **DOCUMENTS** pane to the right.
   c) Click **SEND TO SIGN**.
   d) Click **SEND** on the confirmation popup.

After sending the document for eSignature, the contract's status category and status change to "Other Party Signatures" and "In Signatures", respectively.

Signing a Document with Conga Sign

The signing process begins when you receive an email notification from Conga Sign as a signer informing you that you have a document to sign. The email notification contains a message from the sender and a link to open the document. To begin the signing process, click the link to access the document from your email. Next, you are prompted to read and accept the ESIGN Disclosures and Consent document. Tick the checkbox to confirm you have read the terms of the document, then click the **Accept** button. Then, you are directed to the document which requires your signature. To sign the document, click on the signature box. Adding the required information in each tag and then adding your electronic signature completes the signing process. For more information, see E-Signing a Document.

Viewing a Signed Document with Conga Sign

Once all signatories have signed the document, Conga Sign sends you an email that signing is completed. The email notification contains a link to open the signed document. The contract's status changes to fully signed.

To view a signed document

1. Open the contract record.
2. Navigate to the Documents links.
3. Select the document with a "_signed" suffix.

   or

   Open the email notification and click **DOWNLOAD COMPLETED DOCUMENTS**.

Working with Adobe Sign

This section describes how to send a document for eSignature as a sender, how to sign a document as a signer, and how to view a document after signing is completed. It covers the following topics:

Sending Documents for eSignature with Adobe Sign

After generating a contract document, you can use Adobe Sign to send that document, along with any supporting documents for eSignature. In order to send documents for eSignature, you can use documents already attached to the record and select the documents from the list of available documents. You can select multiple documents for signing within a single request. Then, you select recipients, set the signing order, customize the subject and message of the email, and finalize the document in Adobe Sign.

Prerequisite

A contract with:

- An In Signature status category
- A Ready for Signature status

To send a document for eSignature

1. Open the Contract record.
2. Click **Send for Signature**.
3. Select **ADOBE SIGN** from the "Choose your sending option" popup.

   Note:

   - The Adobe Sign option is automatically selected if you checked **Default Option for Signature** when configuring Adobe Sign. For more information, see Configuring Adobe Sign Parameters in Conga Platform.
   - If only Adobe Sign is active, the "Choose your sending option" popup does not appear, and a page opens to select the documents.

4. Click **Next** to open a page to add documents.
   a) Select the documents to send for eSignature from the Available Documents list. You can select multiple documents.
   b) To search for a document, enter the document name in the Search Documents box.
   c) To change the document's sequence, drag and drop them into the correct order using the Sequence icon ( ) on the left.
   d) To preview the document, click the More icon ( ) on document thumbnails, and then click **Preview**.
   e) To delete the document, click the More icon on document thumbnails, and then click **Delete**.
5. Click **Next** to open a page to add recipients.
   a) To add a name, search for contacts or internal users.
   After selecting a name, the email is automatically populated.
   b) Select **Signer Type** from the drop-down list.
   c) To add a new signer, click **Add Signer**.
   d) To delete a signer, click the Delete icon ( ).
   e) Check **Set Signing Order** to require recipients to sign the documents in a specific order. To change the signer's sequence, drag and drop them into the correct order using the Sequence icon ( ) on the left.

   Note:

   If **Set Signing Order** is not checked, the documents can be signed in any order.
6. Click **Next** to open a page to review and send the documents.
   a) Enter email subject and message for your recipients.
7. Click **Finalize**. This opens the documents inside the Adobe Sign Console.
   a) Drag and drop the required fields into your document.
   b) To associate a field with a recipient, click the recipient's name and drag and drop the required fields into your document.
   c) Click **Send** to send the document for eSignature.

After sending the document for eSignature, the contract's status category and status change to "other party signatures" and "in signatures", respectively.

Signing a Document with Adobe Sign

The signing process begins when you receive an email notification from Adobe Sign as a signer informing you that you have a document to sign. The email notification contains a message from the sender and a link to open the document. To begin the signing process, click the **review and sign** link to access the document from your email. Then, complete each Adobe Sign tag and add your electronic signature where required to sign or initial. Adding the required information in each Adobe Sign tag and then adding your electronic signature completes the signing process.

Viewing a Signed Document with Adobe Sign

Once all signatories have signed the document, Adobe Sign sends you an email that signing is completed. The email notification contains a link and PDF file to open the signed document. The contract's status changes to fully signed.

To view a signed document

1. Open the contract record.
2. Navigate to the Documents links.
3. Select the document with a "_signed" suffix.

   or

   Open the email notification and download the PDF file.

A single PDF document containing all the signed documents is generated if the administrator has enabled Retrieve as Combined Document toggle setting in the DocuSign Setup. Else, all the signed documents are stored and displayed as individual documents.

Working with DocuSign

This section describes how to send a document for eSignature as a sender, how to sign a document as a signer, and how to view a document after signing is completed. It covers the following topics:

Sending Documents for eSignature with DocuSign

After generating a contract document, you can use DocuSign to send that document, along with any supporting documents for eSignature. In order to send documents for eSignature, you can use documents already attached to the record and select the documents from the list of available documents. You can select multiple documents for signing within a single request. Then, you select recipients, set the signing order, customize the subject and message of the email, and finalize the document in DocuSign.

Prerequisite

A contract with:

- An In Signature status category
- A Ready for Signature status

To send a document for eSignature

1. Open the Contract record.
2. Click **Send for Signature**.
3. Select **DOCUSIGN** from the "Choose your sending option" popup.

   Note:

   - The DocuSign option is automatically selected if you checked **Default Option for Signature** when configuring DocuSign. For more information, see Configuring DocuSign Parameters in Conga Platform.
   - If only DocuSign is active, the "Choose your sending option" popup does not appear, and a page opens to select the documents.
4. Click **Next** to open a page to add documents.
   a) Select the documents to send for eSignature from the Available Documents list. You can select multiple documents.
   b) To search for a document, enter the document name in the Search Documents box.
   c) To change the document's sequence, drag and drop them into the correct order using the Sequence icon ( ) on the left.
   d) To preview the document, click the More icon ( ) on document thumbnails, and then click **Preview**.
   e) To delete the document, click the More icon on document thumbnails, and then click **Delete**.
5. Click **Next** to open a page to add recipients.
   a) To add a name, search for contacts or internal users.
   After selecting a name, the email is automatically populated.
   b) Select **Signer Type** from the drop-down list.
   c) To add a new signer, click **Add Signer**.

d) To delete a signer, click the Delete icon ( ).

e) Check **Set Signing Order** to require recipients to sign the documents in a specific order. To change the signer's sequence, drag and drop them into the correct order using the Sequence icon ( ) on the left.

Note:

If **Set Signing Order** is not checked, the documents can be signed in any order.

6. Click **Next** to open a page to review and send the documents.

a) Enter email subject and message for your recipients.

7. Click **Finalize in DocuSign**. This opens the documents inside the DocuSign Console.

a) Drag and drop the required fields into your document.

b) To associate a field with a recipient, click the recipient's name and drag and drop the required fields into your document.

c) To access any specific page of the document, scroll through it using the **DOCUMENTS** pane to the right.

d) Click **Send** to send the document for eSignature.

After sending the document for eSignature, the contract's status category and status change to "other party signatures" and "in signatures", respectively.

Signing a Document with DocuSign

The signing process begins when you receive an email notification from DocuSign as a signer informing you that you have a document to sign. The email notification contains a message from the sender and a link to open the document. To begin the signing process, open the document and review the electronic record and signature disclosure. You must agree to use electronic records and signatures to sign the document. Then, complete each DocuSign tag and add your electronic signature where required to sign or initial. Adding the required information in each DocuSign tag and then adding your electronic signature completes the signing process. For more information, see How to Sign a Document.

Viewing a Signed Document with DocuSign

Once all signatories have signed the document, DocuSign sends you an email that your document is complete. The email notification contains a link to open the signed document. The contract's status changes to fully signed.

To view a signed document

1. Open the contract record.

2. Navigate to the Documents links.

3. Select the document with a "_signed" suffix.

or

Open the email notification and click **VIEW COMPLETED DOCUMENTS**.

A single PDF document containing all the signed documents is generated if the administrator has enabled Retrieve as Combined Document toggle setting in the DocuSign Setup. Else, all the signed documents are stored and displayed as individual documents.

Conga eSignature API Reference

In this section, you learn about Conga eSignature integration API. The Conga eSignature integration API enables you to integrate eSignature functionalities of Conga Sign, Adobe Sign, DocuSign, OneSpan, Sertifi and wet signature into your application. You can send documents for eSignature using any of these eSignature service provider.

In this section the following topics are described:

Conga eSignature APIs

Sending Documents for eSignature with Adobe Sign Using the Conga eSignature API

This use case describes how to integrate Adobe Sign with Conga eSignature service, create a transaction, and send the documents for eSignature using the Conga eSignature integration API. Perform the following tasks to send documents for eSignature:

1. Set up a Adobe Sign account
2. Integrate Adobe Sign with the Conga eSignature service
3. Create a transaction
4. Send for eSignature

Set Up a Adobe Sign Account

Before you start the setup, you must have a Adobe Sign account. Then, create an API application and configure OAuth for that application in your Adobe Sign account. After creating an API application, you get auth server, client ID, client secret, and redirect URL parameter values. These parameter values are required to create the configuration for Adobe Sign.

Note:

- For more information on creating an API application, see Creating an API Application in Adobe Sign.
- For more information on configuring OAuth for an application, see Configuring OAuth for an Application in Adobe Sign.

Integrate Adobe Sign with the Conga eSignature Service

Integrating Adobe Sign with the Conga eSignature service is a two-step OAuth process:

1. Create a configuration for Adobe Sign, which returns a consent URL. Open the consent URL in a browser, log in to your Adobe Sign account, and grant consent. After giving consent, you are redirected to the configured redirect URL in a new browser window. This URL contains an auth code. Copy the auth code from the URL. To create the configuration, call the following API:

Method	PUT
Endpoint	/configurations

Request Body	`{ "signProvider": "AdobeSign", "value": "{\"authServer\": \"<auth server>\", \"clientId\":\"<client ID>\", \"clientSecret\": \"<client secret>\", \"redirectUri\": \"<redirect URI>\"}" "default": false, "active": true, }` Replace <auth server>, <client ID>, <client secret>, and <redirect URI> with the exact values.
Response	A 200 response code with a consent URL.

2. Configure the auth code using the following API:

Method	PUT
Endpoint	/configurations/codes
Request Parameter	signProvider: Select Adobe Sign from the drop-down list.
Request Body	`{ "code": "string" }` Replace the string with the auth code.
Response	A 204 response code.

Create a Transaction

Once Adobe Sign and the Conga eSignature service are integrated, you can create a transaction. To create a transaction, you must prepare a transaction payload. Call the following API to get the exact transaction payload field data:

Method	GET
Endpoint	/settings
Request Parameter	signProvider: Select Adobe Sign from the drop-down list.
Response	This API returns a transaction object with each field's settings, such as which fields are required, optional, or not supported, the data type, and the name and description of the fields.

After preparing a transaction payload, call the following API to create a transaction:

Method	POST

Endpoint	/transactions
Request Body	• signProvider: Select Adobe Sign from the drop-down list. • Payload: Enter payload. **Sample Payload** `{ "name": "Agreement Document", "recipients": [ { "firstName": "First", "lastName": "Last", "email": "flast@conga.com", "signerType": "SIGNER", "index": "0" } ] }` • File: Select the document.
Response	This API returns a transaction ID, which you can use to send the transaction to the recipients.

Send for Signature

After creating a transaction, you need a transaction ID, recipient ID, and document ID to get the tagging URL. Once you get the tagging URL, you can add fields for each recipient to your document and send the document for eSignature.

Get transaction details

Call the following API to get the transaction ID, recipient ID, and document ID:

Method	GET
Endpoint	/transaction/{transactionId}
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select Adobe Sign from the drop-down list.
Response	This API returns transaction details such as recipient details, document details, and reminder and expiration settings.

Get a tagging URL

Call the following API to get the tagging URL:

Method	GET
Endpoint	/transaction/{transactionId}/taggingurls

Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select Adobe Sign from the drop-down list.
Response	This API returns a tagging URL, transaction ID, recipient ID and Document ID.

Open the tagging URL in a browser to view the tagging page, which enables you to add fields for each recipient to your document. Click **Send** to send the document for eSignature. The recipient receives an invitation email to review and sign the document. The recipient can open the document from the email and sign it.

Send the transaction

If you do not want to send the document directly from the tagging page, you can generate a signing URL and send it to the recipients through API. Call the following API to get the signing URL:

Method	GET
Endpoint	/transaction/{transactionId}/recipients/{recipientId}/signingurls
Request Parameters	• transactionId: Enter a transaction ID. • recipientId: Enter a recipient ID. • signProvider: Select Adobe Sign from the drop-down list.
Response	This API returns a signing URL, transaction ID, recipient ID, and Document ID.

Once you get the signing URL, you can send it to the recipients. Call the following API to send the transaction:

Method	POST
Endpoint	/transaction/{transactionId}
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select Adobe Sign from the drop-down list.
Response	A 204 response code.

The recipient can open the document from the signing URL and sign it.

Sending Documents for eSignature with DocuSign Using the Conga eSignature API

This use case describes how to integrate DocuSign with Conga eSignature service, create a transaction, and send the documents for eSignature using the Conga eSignature integration API. Perform the following tasks to send documents for eSignature:

1. Set up a DocuSign account
2. Integrate DocuSign with the Conga eSignature service
3. Create a transaction

4. Send for eSignature

Set Up a DocuSign Account

Before you start the setup, you must have a DocuSign account. Then, create apps and keys in your DocuSign account. While creating apps and keys, you get integration key, secret key, and redirect URL parameter values. These parameter values are required to create the configuration for DocuSign.

Note:

For more information on creating apps and keys, see Creating Apps and Keys in DocuSign.

Integrate DocuSign with the Conga eSignature Service

Integrating DocuSign with the Conga eSignature service is a two-step OAuth process:

1. Create a configuration for DocuSign, which returns a consent URL. Open the consent URL in a browser, log in to your DocuSign account, and grant consent. After giving consent, you are redirected to the configured redirect URL in a new browser window. This URL contains an auth code. Copy the auth code from the URL. To create the configuration, call the following API:

Method	PUT
Endpoint	/configurations

Request Body	{
	"signProvider": "DocuSign",
	"value": "{\"integrationKey\":\"<integrationKey>\",
	\"secretKey\":\"<secretKey>\",
	\"redirectUri\":\"<redirectUri>\"}"
	"default": false,
	"active": true,
	}
	
	Replace <integration key>, <secret key>, and <redirect URI> with the exact values.

Response	A 200 response code with a consent URL.

2. Configure the auth code using the following API:

Method	PUT
Endpoint	/configurations/codes
Request Parameter	signProvider: Select DocuSign from the drop-down list.

Request Body	{
	"code": "string"
	}
	
	Replace the string with the auth code.

Response	A 204 response code.

Create a Transaction

Once DocuSign and the Conga eSignature service are integrated, you can create a transaction. To create a transaction, you must prepare a transaction payload. Call the following API to get the exact transaction payload field data:

Method	GET
Endpoint	/settings
Request Parameter	signProvider: Select DocuSign from the drop-down list.
Response	This API returns a transaction object with each field's settings, such as which fields are required, optional, or not supported, the data type, and the name and description of the fields.

After preparing a transaction payload, call the following API to create a transaction:

Method	POST
Endpoint	/transactions

Request Body	• signProvider: Select DocuSign from the drop-down list.
	• Payload: Enter payload.
	Sample Payload
	{
	"name": "Agreement Document",
	"embeddedSigning": "true",
	"returnUrl": "<Any URL>",
	"recipients": [
	{
	"firstName": "First",
	"lastName": "Last",
	"email": "flast@conga.com",
	"signerType": "SIGNER",
	"index": "0"
	}
	],
	"email": {
	"subject": "Agreement Document for Sign"
	}
	}
	• File: Select the document.

Response	This API returns a transaction ID, which you can use to send the transaction to the recipients.

Note:

When the embeddedSigning value is true, the recipient does not receive an invitation email to review and sign the document. You must generate a signing URL from the API and send it to the recipients.

Send for Signature

After creating a transaction, you need a transaction ID, recipient ID, and document ID to get the tagging URL. Once you get the tagging URL, you can add fields for each recipient to your document and send the document for eSignature.

Get transaction details

Call the following API to get the transaction ID, recipient ID, and document ID:

Method	GET
Endpoint	/transaction/{transactionId}
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select DocuSign from the drop-down list.
Response	This API returns transaction details such as recipient details, document details, and reminder and expiration settings.

Get a tagging URL

Call the following API to get the tagging URL:

Method	GET
Endpoint	/transaction/{transactionId}/taggingurls
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select DocuSign from the drop-down list.
Response	This API returns a tagging URL, transaction ID, recipient ID and Document ID.

Open the tagging URL in a browser to view the tagging page, which enables you to add fields for each recipient to your document. Click **Send** to send the document for eSignature. If you set the embeddedSigning parameter value to false when creating a transaction, the recipient receives an invitation email to review and sign the document. The recipient can open the document from the email and sign it.

Send the transaction

If you set the embeddedSigning parameter value to true when creating a transaction, the recipient does not receive an invitation email to review and sign the document. You must generate a signing URL and send it to the recipients. Call the following API to get the signing URL:

Method	GET
Endpoint	/transaction/{transactionId}/recipients/{recipientId}/signingurls

Request Parameters	• transactionId: Enter a transaction ID. • recipientId: Enter a recipient ID. • signProvider: Select DocuSign from the drop-down list.
Response	This API returns a signing URL, transaction ID, recipient ID, and Document ID.

Once you get the signing URL, you can send it to the recipients. Call the following API to send the transaction:

Method	POST
Endpoint	/transaction/{transactionId}
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select DocuSign from the drop-down list.
Response	A 204 response code.

The recipient can open the document from the signing URL and sign it.

Sending Documents for eSignature with OneSpan Sign Using the Conga eSignature API

This use case describes how to integrate OneSpan Sign with Conga eSignature service, create a transaction, and send the documents for eSignature using the Conga eSignature integration API. Perform the following tasks to send documents for eSignature:

1. Set up a OneSpan account
2. Integrate OneSpan Sign with the Conga eSignature service
3. Create a transaction
4. Send for eSignature

Set Up a OneSpan Account

Before you start the setup, you must have a OneSpan account. Then, create a client app in your OneSpan account. While creating a client app, you get client ID and client secret parameter values. These parameter values are required to create the configuration for OneSpan.

Note:

For more information on creating a client app, see Creating Client App in OneSpan.

Integrate OneSpan with the Conga eSignature Service

To integrate OneSpan with the Conga eSignature service, create the configuration using the following API:

Method	PUT
Endpoint	/configurations

<table>
<tr><td>Request Body</td><td><pre>{
    "signProvider": "OneSpan",
    "value": "{\"clientId\":\"<client
 ID>\",\"clientSecret\":\"<client
 secret>\"}"
    "default": false,
    "active": true,
 }</pre>
Replace <client ID> and <client secret> with the exact values.</td></tr>
<tr><td>Response</td><td>A 204 response code.</td></tr>
</table>

Create a Transaction

Once OneSpan and the Conga eSignature service are integrated, you can create a transaction. To create a transaction, you must prepare a transaction payload. Call the following API to get the exact transaction payload field data:

Method	GET
Endpoint	/settings
Request Parameter	signProvider: Select OneSpan from the drop-down list.
Response	This API returns a transaction object with each field's settings, such as which fields are required, optional, or not supported, the data type, and the name and description of the fields.

After preparing a transaction payload, call the following API to create a transaction:

<table>
<tr><td>Method</td><td>POST</td></tr>
<tr><td>Endpoint</td><td>/transactions</td></tr>
<tr><td>Request Body</td><td>
signProvider: Select OneSpan from the drop-down list.
Payload: Enter payload.
Sample Payload
<pre>{
    "name": "Agreement Document",
    "recipients": [{
        "firstName": "First",
        "lastName": "Last",
        "email": "lfirst@conga.com",
        "signerType":
 "EXTERNAL_SIGNER",
        "index": "0"
    }]
}</pre>
File: Select the document.
</td></tr>
<tr><td>Response</td><td>This API returns a transaction ID, which you can use to send the transaction to the recipients.</td></tr>
</table>

Send for Signature

After creating a transaction, you need a transaction ID, recipient ID, and document ID to get the tagging URL. Once you get the tagging URL, you can add fields for each recipient to your document and send the document for eSignature.

Get transaction details

Call the following API to get the transaction ID, recipient ID, and document ID:

Method	GET
Endpoint	/transaction/{transactionId}
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select OneSpan from the drop-down list.
Response	This API returns transaction details such as recipient details, document details, and reminder and expiration settings.

Get a tagging URL

Call the following API to get the tagging URL:

Method	GET
Endpoint	/transaction/{transactionId}/taggingurls
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select OneSpan from the drop-down list.
Response	This API returns a tagging URL, transaction ID, recipient ID and Document ID.

Open the tagging URL in a browser to view the tagging page, which enables you to add fields for each recipient to your document. Click **SEND TO SIGN**, and then **SEND** to send the document for eSignature. The recipient receives an invitation email to review and sign the document. The recipient can open the document from the email and sign it.

Send the transaction

If you do not want to send the document directly from the tagging page, you can generate a signing URL and send it to the recipients through API. Call the following API to get the signing URL:

Method	GET
Endpoint	/transaction/{transactionId}/recipients/{recipientId}/signingurls
Request Parameters	• transactionId: Enter a transaction ID. • recipientId: Enter a recipient ID. • signProvider: Select OneSpan from the drop-down list.

Response	This API returns a signing URL, transaction ID, recipient ID, and Document ID.

Once you get the signing URL, you can send it to the recipients. Call the following API to send the transaction:

Method	POST
Endpoint	/transaction/{transactionId}
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select OneSpan from the drop-down list.
Response	A 204 response code.

The recipient can open the document from the signing URL and sign it.

Sending Documents for eSignature with Sertifi Using the Conga eSignature API

This use case describes how to integrate Sertifi with Conga eSignature service, create a transaction, and send the documents for eSignature using the Conga eSignature integration API. Perform the following tasks to send documents for eSignature:

1. Set up a Sertifi account
2. Integrate Sertifi with the Conga eSignature service
3. Create a transaction
4. Send for eSignature

Set Up a Sertifi Account

Before you start the setup, you must have a Sertifi account. Then, you need a API code to integrate Sertifi with the Conga eSignature Service.

To get the API code

1. Log in to your Sertifi account.
2. Navigate to the **Administrator** tab.
3. Click **Account Settings**.
4. Copy the API code.

Integrate Sertifi with the Conga eSignature Service

To integrate Sertifi with the Conga eSignature service, create the configuration using the following API:

Method	PUT
Endpoint	/configurations

<table>
<tr><td>Request Body</td><td><pre>{
    "signProvider": "Sertifi",
     "value": "{\"apiCode\":\"<API
 Code>\",
                 \"senderEmailAddress\":
\"<Sender email address>\",
                 \"senderEmailDisplayName
\":\"<sender email display name>\"}"
    "default": false,
    "active": true,
}</pre>
Replace <API code>, <Sender email address>, and <sender email display name> with the exact values.

The email address used in the configuration must belong to an administrator or user within Sertifi.</td></tr>
<tr><td>Response</td><td>A 204 response code.</td></tr>
</table>

Create a Transaction

Once Sertifi and the Conga eSignature service are integrated, you can create a transaction. To create a transaction, you must prepare a transaction payload. Call the following API to get the exact transaction payload field data:

Method	GET
Endpoint	/settings
Request Parameter	signProvider: Select Sertifi from the drop-down list.
Response	This API returns a transaction object with each field's settings, such as which fields are required, optional, or not supported, the data type, and the name and description of the fields.

After preparing a transaction payload, call the following API to create a transaction:

<table>
<tr><td>Method</td><td>POST</td></tr>
<tr><td>Endpoint</td><td>/transactions</td></tr>
<tr><td>Request Body</td><td>
• signProvider: Select Sertifi from the drop-down list.
• Payload: Enter payload.

Sample Payload
<pre>{
    "name": "Agreement Document",
    "recipients": [{
        "firstName": "First",
        "lastName": "Last",
        "email": "flast@conga.com",
        "signerType": "SIGNER",
        "index": "0"
    }]
}</pre>
• File: Select the document.</td></tr>
</table>

Response	This API returns a transaction ID, which you can use to send the transaction to the recipients.

Send for Signature

After creating a transaction, you need a transaction ID, recipient ID, and document ID to get the tagging URL. Once you get the tagging URL, you can add fields for each recipient to your document and send the document for eSignature.

Get transaction details

Call the following API to get the transaction ID, recipient ID, and document ID:

Method	GET
Endpoint	/transaction/{transactionId}
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select Sertifi from the drop-down list.
Response	This API returns transaction details such as recipient details, document details, and reminder and expiration settings.

Get a tagging URL

Call the following API to get the tagging URL:

Method	GET
Endpoint	/transaction/{transactionId}/taggingurls
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select Sertifi from the drop-down list.
Response	This API returns a tagging URL, transaction ID, recipient ID and Document ID.

Open the tagging URL in a browser to view the tagging page, which enables you to add fields for each recipient to your document. Click **SEND TO SIGN**, and then **SEND** to send the document for eSignature. The recipient receives an invitation email to review and sign the document. The recipient can open the document from the email and sign it.

Send the transaction

If you do not want to send the document directly from the tagging page, you can generate a signing URL and send it to the recipients through API. Call the following API to get the signing URL:

Method	GET
Endpoint	/transaction/{transactionId}/recipients/{recipientId}/signingurls
Request Parameters	• transactionId: Enter a transaction ID. • recipientId: Enter a recipient ID. • signProvider: Select Sertifi from the drop-down list.

Response	This API returns a signing URL, transaction ID, recipient ID, and Document ID.

Once you get the signing URL, you can send it to the recipients. Call the following API to send the transaction:

Method	POST
Endpoint	/transaction/{transactionId}
Request Parameters	• transactionId: Enter a transaction ID. • signProvider: Select Sertifi from the drop-down list.
Response	A 204 response code.

The recipient can open the document from the signing URL and sign it.

Conga eSignature Integration with Conga Platform Features by Release

Review the latest Conga eSignature Integration with Conga Platform Features by Release document.

Features by Release on page 32

Features by Release

This document contains an overview of features introduced in each major release of Conga eSignature Integration with Conga Platform. For more information, see Conga eSignature Integration with Conga Platform Features by Release.