# HelloSign for ActiveCampaign

USER GUIDE (Version 1.0.0)



ActiveCampaign ≥



# Introduction

### Thank You!

Thank you for purchasing HelloSign for ActiveCampaign. This connector brings the full eSignature functionality of HelloSign into ActiveCampaign, turning your CRM into a comprehensive contract creation, signing, and management hub.

Please be aware that for this connector to work, you need an existing license for ActiveCampaign as well as a HelloSign license for each user.

# Using This Guide

This user guide contains three distinct sections. The first is focused on initial setup and configuration of the connector. The second focuses on using the connector to create, send, and log signature documents directly in ActiveCampaign. The final section contains answers to frequently asked questions that you can review for clarification and troubleshooting purposes.

If you have any questions that cannot be answered using this guide, please reach out to our team directly for support with your issue. You can reach us by completing the form on this page: https://www.activecampaign.com/apps/HelloSign-integration



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# Installation Steps for HelloSign

### Prerequisites

- 1. Each user must have an active HelloSign Web App or API subscription either with Standard or Premium plans.
- 2. Organization must have an ActiveCampaign account.

### Installation

- Go to Apps All Apps in ActiveCampaign and search for "HelloSign"
- Click on "HelloSign" and begin installation.
- After installation is complete, the app can be found in Connected Apps. When the user opens the app, it will display its logo and description.

≽	Apps	Connected Apps / HelloSign	View Logs
Q	Connected Apps	🕁 HelloSign	
Q ^	All Apps	www.hellosign.com	
<u>ب</u>	App Studio	Accounts App Details	
2° 2	Popular Apps	Accounts App veraits	
6	Newest Apps		
\$	Accounting		
Ē	Analytics CMS		
	CMS		
	Databases		
~	Developer Tools		
٥			
¢	Documents	Use HelloSign with ActiveCampaign for an easy-to-use and fast way to get your documents signed online. Send. Sign. Track. Done!	

# **Using the Connector**

 Users can make use of the existing templates that were created in the HelloSign App (on www.hellosign.com account) for initiating "send approval" process through HelloSign, where each template should consist of Signers and merge fields (these get printed on the template during send signature request)

### HelloSign Template help link:

https://faq.hellosign.com/hc/en-us/articles/115002654228-HelloSign-Templates

# HelloSign Custom Fields

To send the required fields to HelloSign template all such fields must be first created for the ActiveCampaign Contact, users need to consider below points:

Where a single user has a single role defined in HelloSign Template, one can use Contact's Name and Email for signers. If you have more than one signer for Signature Request, you need to create Name and Email fields in the Contact table respective to the roles (these will be needed for mapping fields while setting up Automation workflow in ActiveCampaign).

≽	Lists	Manage Fields		
٩	Manage Lists	Accounts Contacts	Deals	
Q	Manage Fields			Any Type 👻 Any List 💌 Q Search fields
	Subscriptions by Email	Phone	Text Input	%PHONE%
₽;	Manage Exclusions	Account	Text Input	%ACCT_NAME%
	Edit Email Headers	Job Title	Text Input	%CONTACT_JOBTITLE%
۲		ContractingParty	Text Input	%CONTRACTINGPARTY%
\$				
E		✓ HelloSign Fields		
:=		Field Name	Туре	Personalization Tag
•		🗆 Signer-1 Email	Text Input	%SIGNER1EMAIL%
		🗆 Signer-1 Name	Text Input	%SIGNER1NAME%
նո		🗆 Signer-2 Email	Text Input	%SIGNER2EMAIL%
•		Signer-2 Name	Text Input	%SIGNER2NAME%
*				

Help link to add custom fields: <u>https://www.youtube.com/watch?v=1\_Y-IYfWNbM</u>

# Create Workflow for Send Signature Request

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Workflow will be used to initiate HelloSign inbound flow. You can create workflows with available options in ActiveCampaign.

Help link: https://www.youtube.com/watch?v=aSa2HtbrCCI

- You will find the "Send HelloSign Signature Request" Action step in the Actions list.
- You can use this action in any workflow as an Action step. For Example: you can use it when the Deal stage is changed.





### "Send HelloSign Signature Request" Action Steps

As soon as you install the app, you will find this action in the action list while creating workflow. Drag and drop the Action in the workflow.

### Connecting to HelloSign

Connect	Template Configurations	Review Objects	Mapping
	[		
You mu	ust connect to HelloSig	gn Connector before cont	inuing.



### Note:

• The HelloSign account used for logging in will have all the documents once signature requests are completed.

Users can also use their HelloSign account on www.HelloSign.com for sending and receiving documents.



**Template Configurations** 

• For all the input, there are help tip provided as placeholders.

Connect	Template Configurations	Review Objects	Mapping
Template			*
Active Campaig	in Template		х -
Subject			Personalize 🔻
Quote of %first	Name% %lastName%		
Description (Op	tional)		Personalize 🔻
Please review qu	ote and sign it.		

- Please add information of ActiveCampaign API URL, ActiveCampaign API Key, Test Mode, Allow Decline (ActiveCampaign API Key and URL can be found in ActiveCampaign Setting > Developer Section). This will be a onetime activity for a selected template. If you are doing this for multiple templates, then this needs to be done for all the templates.
- Select a Template to send a Signature Request, set the Subject and Description.
- Click on Continue.

### Prerequisites:

• Create the Templates on respective HelloSign accounts. If the Templates are not created on HelloSign then that data will not flow in ActiveCampaign.

### **Review Object**

• It displays the custom object that will be created in the Contact relationship. Click on Continue.

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# Mapping

onnect	Template Configurations		Review Objects		1apping	Connect	Template Configurations		Review Objects	Mappin	
ActiveCampaign			Template Fields			ActiveCampaign			Template Fields		
First Name	× •	$\rightarrow$	Customer Name *	•		Signer-1 Name	× •	$\rightarrow$	Approver Name *	•	
Email	× •	$\rightarrow$	Customer Email *	•		Signer-2 Name	× •	$\rightarrow$	Customer Name *	•	
Last Name	× •	$\rightarrow$	Lastname	× •	ŧ	Signer-1 Email	× •	$\rightarrow$	Approver Email *	•	
	+	<ul> <li>Add field</li> </ul>	d mapping			Signer-2 Email	x •	$\rightarrow$	Customer Email *	•	
				_		First Name	х •	$\rightarrow$	Firstname	× •	Ō
Back			Ca	ncel Fi	inish	Last Name	× •	$\rightarrow$	Lastname	× •	Ō
					_		+	<ul> <li>Add fiel</li> </ul>	d mapping		
						Back			Ca	ncel	inish

- Mapping shows Signature Request Template signer (Name and Email) and merge fields information.
- Signer information is required, and merge fields are optional to map.
- Mapping these fields depends on how many signers there are.
- If there is only 1 signer as displayed in Example-1 in screenshot, you can use default fields of Contact like Firstname, Email and Lastname (please note: all the contacts have been updated with the value else the request will throw an error in "view log section"). We have mapped default fields for signers and merge fields of the Signature Request Template.
- If there are more than 1 signers as displayed in Example-2 in screenshot, you need to use custom fields to map additional signers. We have mapped custom fields for signers and default fields for merge fields of the Signature Request Template (please note: all the contacts have been updated with the value else the request will throw an error in "view log section").
- Click on Finish to complete the action.



# Review Logs for Signature Request Sent through Workflows

- The Signature Request will be sent as soon as the workflow event is executed. Please make sure your contact has details like Name and Email ID to execute the workflow, if the details are missing user will get a error in Logs (HelloSign > view Logs)
- Example, if you have created a workflow to send Signature Request on Deal stage change, it will send Signature Request when the Deal stage will be changed (example: Follow-up to In Contract).
- You will be able to see logs in Apps > Connected Apps > HelloSign > View Logs.
   "View" will only have a JSON object file (it is expected).

≽	Apps	Connected Apps /	HelloSign / View Logs									
٩	Connected Apps				APP	HelloSign 🔹	ACCOUNT	All	• TY	PE	All	¥
	All Apps	Date	Арр	Account	Status	Туре		Event				
0 ₽	App Studio	17/5/2022, 8:57:2	HelloSign	538da81b5f9cc2d	<ul> <li>Succes</li> </ul>	s Outb	ound	Send Hello	ign Sig		Vi	iew
<u> </u>	Popular Apps	47/5/2022 0:45:4	11-11-01	538da81b5f9cc2d		- 0.0		C			10	iew
	Newest Apps	17/5/2022, 8:45:4	HelloSign	538da81b5f9cc2d	<ul> <li>Succes</li> </ul>	s Outb	ound	Send Hello	oign Sig		VI	ew

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≽	Contacts / Ron	ey Smith				
٩	Personal Info	All Deals (1)				
Q ^		(1)				
<b>₽</b> }	⊻ Signature R	equests (1)			Signature Requ	est - Add a Record
	Date	Title	Status	Remaining Signers	Requester Email	
۲	05/17/2022.	. Quote of Roney	In Progress	1	Link	
\$ ■	05/14/2022.	. Laptop Deal	Cancelled	-	Link	
∷≣						

# **Signature Request & Events**

- Users can find all the Signature Requests in the subgrid (a.k.a Quick Views) of the contact form.
- Users can find all the Signature Request events like Created, Signed, Declined, Bounced, Completed and Downloadable in Recent Activities.
- Users can view all the signer and other information in the sidebar by clicking on the Details (three dots) button in the subgrid row (activity details).
- Columns
  - Date: This column contains the date and time of the latest event. For example, Signature Request Completed.
  - Title: This column contains the Title of the Signature Request.
  - Status: This column contains the latest Status of the Signature Request (In progress, Cancelled, Completed).
  - Remaining Signers: This column shows count of the remaining signers ('-'means no signature pending).
  - Requester Email: This column contains a Requester email who has sent the Signature Request.
  - $\circ$   $\;$  Signers: This column contains emails of the Signers.
  - Document ID: This column ID of the Signature Request.

### **Track Signature Request**

• Go to Deal Open the deal in ActiveCampaign. There is a Signature Request Tab available.

٤.	Forecasted Close Date	Click to add	1									
?	▼ Signature Requests											
2										Search:		_
4	Date 🔶	Title	\$	Status	÷	Signers	\$ Pending	+	Document	\$	Cancel Request	
<i>y</i>	2022-05-10 10:45	NDA for new joining		In Progress		View	1		View		Cancel Request	
5	2022-05-10 14:00	Purchase Agreement		In Progress		View	1		View		Cancel Request	
4	2022-05-07 10:00	Sales Agreement		Cancelled		-	-					
	Showing 1 to 3 of 3 entrie	es										
1												
⊕ ⊐												

- This tab contains information about Signature Requests like Date, Title, Status, Signers, Pending, Document and Cancel Request.
- Document: user can download document with current Signature Status.
- Cancel Request: user can cancel the Signature Request.
- Signers: Signer contains functionalities to List Signer with Status and Send Reminder. User can select one or more signer and can Send Reminder

							Search:	
Date	Title	-	Claim	et a sur	Deadlar	Present		Cancel Request
2022-05-10 10:45	NDA for new joinin	Sig	ners			×		Cancel Request
2022-05-10 14:00	Purchase Agreeme		l Request Sent: 1 l Responded: 0					Cancel Request
2022-05-07 10:00	Sales Agreement	<b>v</b>	Signer	Signing Order	Status			
owing 1 to 3 of 3 ent	ries		Roney Smith	-	Awaiting Signture			
					Close	d		

### Send One Time Document

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- Go to Contact, Open the Contact. There is Send Signature Request Tab available
- Using this functionality, users can send One Time Signature Requests by selecting the file of their choice.
- On Submit, the Signature Request will be sent, and it will get the events in the Recent Activities.



≫	Contacts / Roney Smith Send a Cam	paign
٩	Personal Info All Deals (1)	
^^^ 	Send Signature Request         All Activities         All Activities	•
	Sender Email* Sender Email* Select API URL* Go to Settings> Developer> Copy 'URL' API Key* Go to Settings> Developer> Copy 'Key' Select a file* Comment Completed automation Comment Comment Completed automation Completed automation Comment Comme	
0 ¢	Browse No file selected. Supported format:.doc,.docxpdfpptx,.pptx,.jpgjpegpng,.xls,.xlsx,.txt,.html,.gif. Max supported size: 15 MB C  Entered automation Inbound_Automation	
◄	Contacts / Roney Smith     Send a Camp       Personal Info     All Deals (1)	aign
	Send Signature Request       Comment         Subject*       Completed automation         Description       Completed automation Inbound_Automation         21 hours ago       Comment         Comment       Comment         Submit       Entered automation         Entered automation       Entered automation         Entered automation       Entered automation         Entered automation       Entered automation         21 hours ago       Comment         Comment       Comment	

- Sender Email: This will allow user to select an email of HelloSign account from which user wants to send a Signature Request
- ActiveCampaign API URL: User will get this from Settings --> Developer --> Copy 'URL'
- ActiveCampaign API Key: User will get this from Settings --> Developer --> Copy 'Key' Note: This step needs to be done every time when we are sending a One-time document via ActiveCampaign. Users can use a <u>HelloSign</u> account to send one time document directly too.
- Select Files: User can select one or more file to send in Signature Request
- Signers: User can add Signers and CC of the Signature Request
- Set Signature Order: User can set ordering to the Signer in the sequence they have added
- Subject: User can add Subject/Title of Signature Request here.
- Description: User can add Description of Signature Request here.

# **Frequently Asked Questions**

⇒ Do I need a HelloSign Account to use the HelloSign ActiveCampaign? Yes, you must have a HelloSign account. Please reach out to activecampaign@hellosign.com for subscription and details.

### $\Rightarrow$ Which HelloSign subscription is required to use this solution?

Each user must have an active HelloSign WebApp or API subscription either Standard or Premium plan to enable this connector. Also, the number of users should sign in ActiveCampaign with their HelloSign account. Example: If 20 users will use ActiveCampaign to download this application and send signature requests, then they need to enable 20 users on HelloSign.

⇒ How does the HelloSign account connect from ActiveCampaign, and what role is required for that?

You can connect with HelloSign using OAuth as described in the above section (TODO). Your HelloSign account with Admin or Developer Role (if enabled via API) if you have WebApp subscription then you do not have to make any changes in HelloSign account settings.

 $\Rightarrow$  How to use ActiveCampaign API key and ActiveCampaign API URL from ActiveCampaign?

Connector uses ActiveCampaign API key and ActiveCampaign API URL from ActiveCampaign (ActiveCampaign API Key and URL can be found in ActiveCampaign Setting > Developer Section) to authenticate the callbacks received from HelloSign. When callbacks are received on middleware it decodes the ActiveCampaign API key and URL and updates the custom object to the same instance from which request is received. This is a mandatory step to enable this connector (this process is needed when you enable the Automation workflow in ActiveCampaign)

 $\Rightarrow$  How can I get ActiveCampaign API URL and Key from ActiveCampaign?

You can get this from Settings --> Developer --> Copy 'URL'. You can get this from Settings --> Developer --> Copy 'Key'

- ⇒ Can I use ActiveCampaign API URL and Key for any user from ActiveCampaign? ActiveCampaign API Key and URL must be from the user who has admin access to ActiveCampaign. It won't work for Normal users.
- ⇒ Which type of HelloSign Templates can we set up in workflow to send signature requests? You can only set up Templates which send Signature Requests using email to the workflow.



### ⇒ How can I see the Signature Request sent?

You can see the Signature Request in Contact form. There is a subgrid called Signature Request given. You can find title, status, signers, and document download link within the Signature Request.

### ⇒ Can I track the event of the Signature Request?

Signature Request can be tracked from both Contacts and Deals. There is a section "Signature Request" from there you can review the latest status of each request and also send reminders, download signed documents, and send cancel requests, if required.

You can also track the events (like Signed, Declined, Email bounced) in Recent Activities in Contact form. For more details refer to these sections: 1- Track Signature Request, 2- Signature Request & Events

### $\Rightarrow$ Can I check if the email is bounced, or the user has declined the Signature Request?

Yes, you can see these events in Recent Activities. You can also see the user or email for which it is bounced in the grid view (please make sure the email id is correct of the user else you may have to cancel the request).

### ⇒ Can I send Contact information in Signature Request?

Yes, you can send Contact information in Signature Request email(subject/description) as well as a part of Template merge fields. You need to map the contact fields while setting up the workflow.

#### ⇒ Can I send a Signature Request in any workflow?

You can send Signature Requests in any workflow where the contact is involved. You just need to add the action of "Send HelloSign Signature Request" in the workflow steps.

### ⇒ Can I send reminders to signers of the Signature Request?

You can send a reminder from the 'Signature Requests' tab given in Deal form. You can see the status of the signers as well in the same popup.

#### ⇒ Can I send a one-time Signature Request using a document?

You can send one time Signature Request from the 'Send Signature Request' tab given in Contact form. You would need an ActiveCampaign API key and URL every time to send a one-time document. You can also perform this action by logging in to HelloSign Account and sending documents out.

You can get this info from Settings --> Developer --> Copy 'URL'. You can get this from Settings --> Developer --> Copy 'Key'

### $\Rightarrow$ How do we access the logs?

The Signature Request will be sent as soon as the workflow event is executed. Please make sure your contact has details like Name and Email ID to execute the workflow, if the details are missing the user will get an error in Logs (HelloSign > view Logs)

Refer to section for more details - Review Logs for Signature Requests Sent through Workflows. It has all the details

#### $\Rightarrow$ How can I download the signed documents?

You can download from the 'Signature Request' tab given in Deal form. There is a download column. Once you click on the link you should be able to download the document. Users will be able to download documents at any stage (in progress, completed, declined). All the Completed/Signed documents are also stored in the respective HelloSign Account in documents section.

#### ⇒ How can I send a Signature Request in Test Mode for Automation?

While setting up the automation step, there is a setting 'Test Mode?'. You can mark it as "Yes" for Test Mode. If the user selects Test Mode = "No" then all the signed documents will be non-legally binding documents.

# ⇒ How can I define signer order in case we have multiple signers in case of a one-time document?

You can define signer order by clicking the checkbox below the signer list. Order is automatically defined in which they are added.

#### $\Rightarrow$ What if I have specified a wrong email address and email is bounced?

In the case of an incorrect email (email does not exist) View Log console shows an error, you can change the email address on HelloSign console and resend. Otherwise, you can cancel the request and send a fresh request. *Please note*: email ID is correct in contact section/custom objects.