

PandaDoc Integration Setup Guide


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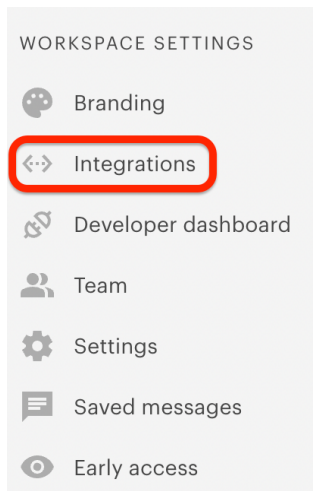
Generating the API Integration Key

The first item required for a successful integration between PandaDoc and CampusLogin is the API key; a code that will be entered into the PandaDoc admin tool to connect the two platforms together.

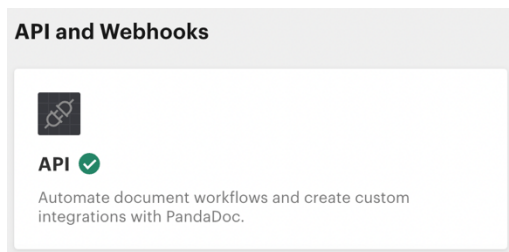
Please note that you will need to have admin-level access in PandaDoc to complete this step.

To generate the API key:

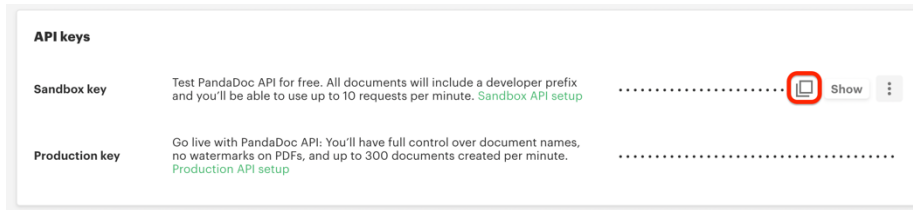
1. In your PandaDoc account, click  **Settings** on the left navigation bar.
2. Select **Integrations** from the menu on the left side of the screen.



3. Scroll to the bottom of the page and click **API** under the **API and Webhooks** heading.



4. Under **API Keys**, hover over **Sandbox key** and click the box to copy the key to your clipboard.



*Note that this is a temporary key that will be used while setting up and testing the integration. Once it is complete, it will be replaced with the **Production** key.*

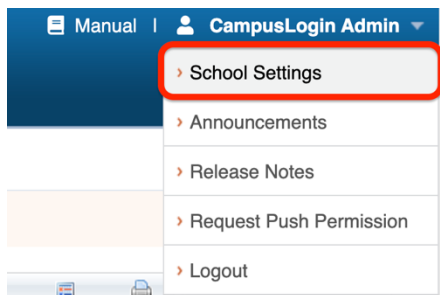
5. Paste and save the API key somewhere safe as you will be adding it to CampusLogin in the next section.

Completing the PandaDoc Integration in CampusLogin

After generating the API key in PandaDoc, it needs to be added to the PandaDoc admin tool in CampusLogin, along with some other details.

To add the integration details in CampusLogin:

1. Under your name in the top right-hand corner, click **School Settings** from the dropdown menu.



2. Scroll to the bottom of the page and select **DocuSign/PandaDoc Admin**.



DocuSign/PandaDoc Admin

Here you can maintain your DocuSign/PandaDoc account's settings and role and field mapping.

3. Complete the mandatory fields, as shown in the image below, including:
- **API Login EndPoint:** This is a standard field. Enter <https://api.pandadoc.com/public/v1>
 - **API Username:** Add the admin-level email you use to log in to PandaDoc.
 - **API Password:** Add the password for the same account.
 - **API Integrator Key:** Here is where you will paste the API key that you copied from PandaDoc earlier.
 - **Enable Online:** Set this to **Enable**.
 - **Admission Role Name:** This is how you want the Admissions (Recruiter) role to appear. It will need to match what you have called the signing role in PandaDoc.
 - **Student Role Name:** This is how you want the Student role to appear. It will need to match what you have called the signing role in PandaDoc.

DocuSign/Pandadoc Admin

DocuSign/PandaDoc Settings

API Login EndPoint:	<input type="text" value="https://api.pandadoc.com/public/v1"/>
API Username:	<input type="text" value="admissions@school.com"/>
API Password:	<input type="text" value="Password1"/>
API Integrator Key:	<input type="text"/>
Enable Online:	<input type="text" value="Enable"/> ▾
Enable OAuth:	<input type="text" value="Disable"/> ▾
Admission Role Name:	<input type="text" value="Admissions"/>
Student Role Name:	<input type="text" value="Student"/>

4. Click **Save Settings** when the information has been entered.

Save Settings

CampusLogin and PandaDoc are now integrated and you are ready to start adding and mapping specific documents.

Adding Documents to the Integrated Folder in PandaDoc

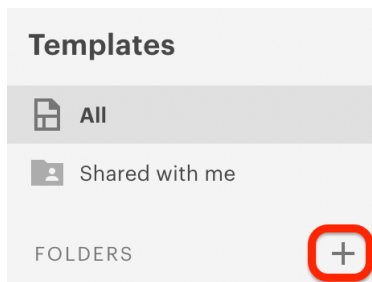
In order for PandaDoc documents to show up in CampusLogin to be sent for signing, they must be in a specific folder in PandaDoc.

To create a new folder in PandaDoc:

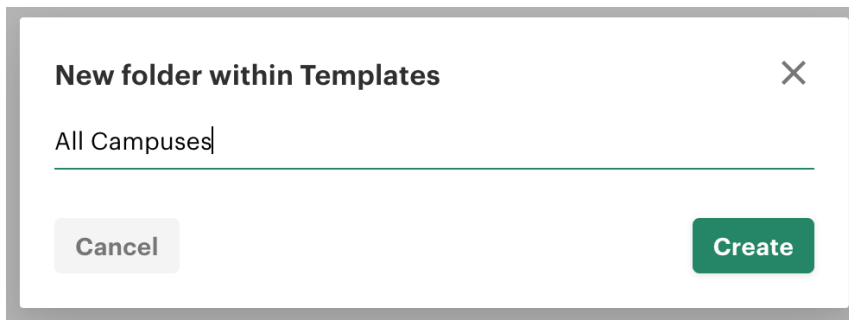
1. Click the **Templates** icon on the left navigation bar.



2. Click the plus sign beside **Folders** under the **Templates** heading.



3. In the box that pops up, name the folder **All Campuses** and click **Create**. *For the integration to work, this folder must be named "All Campuses".*



4. Add any documents you will need to send through CampusLogin to this folder.

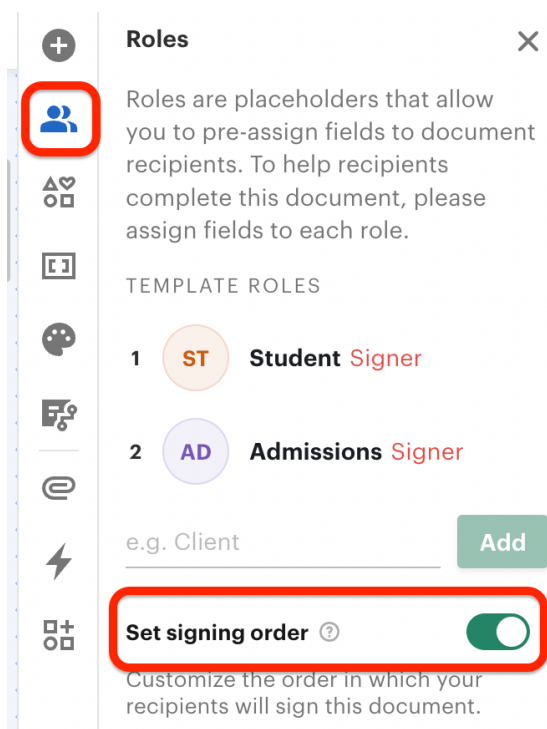
Mapping Documents to CampusLogin Fields

To be able to have CampusLogin populate the fields in a PandaDoc document, the fields must be mapped so the PandaDoc fields connect to the corresponding CampusLogin fields.

First, you will create the fields in PandaDoc. Then, you will add each field to the PandaDoc Admin tool in CampusLogin with the corresponding CampusLogin field.

To create the fields in PandaDoc:

1. Open the document you want to work on in PandaDoc.
2. Navigate to the **Roles** tab.
3. Ensure you have added, at minimum, the **Student** and **Admissions** roles. *For the sake of testing, ensure the Student role is in the #1 spot for now. This can be changed before going live, if necessary.*
4. Toggle the switch to turn on the **Set signing order** option. This is required for the documents to send successfully from CampusLogin.



5. Next, go to the **Content** tab (the plus symbol).

6. Select the **Admissions** role from the dropdown.
7. Drag and drop a **Text Field** to your first field.

The screenshot shows a form design interface. On the left is a preview of a form titled 'PART B: STUDENT INFORMATION' with fields for Last Name, First Name, Middle Name, Gender, Unit Number, Street Number, Street Name, City, Province, Postal / ZIP Code, Country, Home Phone Number, Mobile Phone Number, E-Mail, Date of Birth, Alberta Student Enrolment Number / ASN, Former Surname, Also Known As, Aboriginal Status, Legal Status, and International Student. A red box highlights the 'Enter value' placeholder in the 'Last Name' field. On the right is a 'Content' panel with a 'FILLABLE FIELDS FOR' dropdown set to 'Admissions'. Below this dropdown, a 'Text field' option is highlighted with a red box. A red arrow points from this 'Text field' option to the 'Enter value' placeholder in the form preview.

8. Click the **Properties** symbol in the row that appears.

The screenshot shows the 'Properties' panel for the 'Admissions' role. The panel has a header with '15' and 'Admissions'. Below the header are several icons: a square, a square with a plus sign, a square with a minus sign, a square with a diagonal line (highlighted with a red box), a square with a trash can, and a square with a lock. A red arrow points from the 'Properties' symbol to the 'Properties' panel. Below the panel is a 'Text field' placeholder with the text 'Enter value'.

9. Complete the following:
 - Remove the text “**Enter value**” from the **Placeholder** field.
 - Uncheck the **Multiline** text box (and the **Required** text box, if it is not a required field).

The screenshot shows the 'Text Field' properties panel. The panel has a header with 'A | Text Field'. Below the header is a dropdown menu set to 'Admissions Signer'. Below the dropdown is a 'PLACEHOLDER' section with a text input field containing 'Enter value'. Below the placeholder is a 'VALIDATION' section with a dropdown menu set to 'None'. Below the validation is a 'SETTINGS' section with three checkboxes: 'Required' (checked), 'Multiline text' (checked), and 'Mask field value' (unchecked). A red box highlights the 'Placeholder' field with the text 'Enter value'. Another red box highlights the 'Required' and 'Multiline text' checkboxes, which are both checked.

10. Scroll down in the **Properties** and add the **Merge Field** where it says “**Enter name of merge field**”. *This is the most important field as it will be what you use to connect the document to the CampusLogin field.*

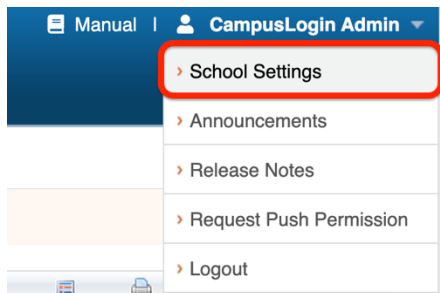


11. Repeat these steps for all fields that need to be added to the document. Note that, where fields are required to be completed by the student, you should change the dropdown from Step #6 to **Student**.

Next, you must connect the **Merge Fields** you created in the document to the corresponding field values in CampusLogin.

To add the fields to the PandaDoc Admin tool in CampusLogin:

1. Under your name in the top right-hand corner, click **School Settings** from the dropdown menu.



2. Scroll to the bottom of the page and select **DocuSign/PandaDoc Admin**.



DocuSign/PandaDoc Admin

Here you can maintain your DocuSign/PandaDoc account's settings and role and field mapping.

3. Scroll down to the section titled **DocuSign/PandaDoc Field List**.

DocuSign/PandaDoc Field List

- Click **Add New Field**.

Add New Field

- Add the name of the field you created in your PandaDoc document in the **DocuSign/PandaDoc Field** text box. ***This must match exactly how it is named in PandaDoc (case sensitive).***
- Write the corresponding CampusLogin field in the **CampusLogin Field Name** text box. This field name must be within **{curly brackets}** and again, must match exactly as it is in CampusLogin (also case sensitive). These values can be found by clicking the **Values Page** button.

DocuSign/PandaDoc Field:	<input type="text" value="LastName"/>
CampusLogin Field Name:	<input type="text" value="{LastName}"/>
	<input type="button" value="Submit"/> <input type="button" value="Values Page"/>

If you cannot find a field you are looking for in CampusLogin, it may need to be created. You can reach out to your CampusLogin Account Manager for assistance with this.

- Repeat for all fields that were created in the PandaDoc document.

Sending a PandaDoc Letter via CampusLogin

It is important to test the integration to ensure everything was done correctly. This can be done using a test lead in CampusLogin and sending a PandaDoc letter from the contact profile.

To send a PandaDoc letter in CampusLogin:



- Navigate to a test lead's contact profile in CampusLogin.
- Ensure the contact's email address is set to one you have access to **outside of CampusLogin (a personal email not being used anywhere in CampusLogin)**.


E-Mail:	<input type="text" value="personalemail@gmail.com"/>
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3. Click **Print a Letter**.



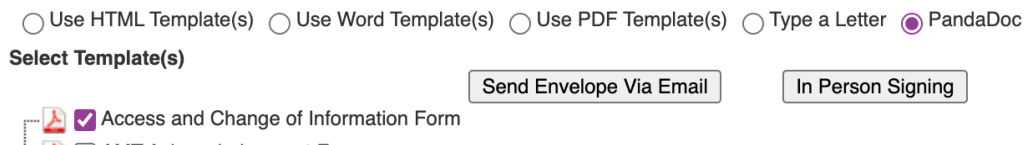
Follow Up Options

 Send an E-Mail  Schedule a Follow Up

 Print a Label  **Print a Letter**


Incoming Appointments


4. Select the **PandaDoc** radio button.
5. Check off the correct document from the list.
6. Click **Send Envelope via Email**.



☐ Use HTML Template(s) ☐ Use Word Template(s) ☐ Use PDF Template(s) ☐ Type a Letter ☒ PandaDoc

Select Template(s)

 ☒ Access and Change of Information Form

 [Document Name]

Send Envelope Via Email **In Person Signing**

7. Verify you have received the document in your email and review it to ensure the fields mapped and appeared the way you expect them to.