

DocuSign API Certification

DocuSign® is the global standard for Digital Transaction Management and electronic signature, offering the easiest, fastest, most secure way to send, sign, track and store documents in the cloud – anytime, anywhere, on any device. DocuSign offers APIs for REST and SOAP that share the same underlying data model and standard objects. These innovative APIs make connecting with DocuSign's Digital Transaction Management platform faster and easier for customers and partners. Organizations leveraging the API can offer DocuSign Digital Transaction Management convenience from existing or new business processes in just hours of development time instead of weeks – accelerating speed to results, reducing costs, and delighting customers.

API Certification Process

Applications using DocuSign APIs must go through the certification process to operate in our production environment. In API Certification, the Integration is examined for following DocuSign's Security & Design Requirements and providing a full Support Model for post app launch. We recommend reviewing our API Requirements Guide prior to beginning development, as it will streamline the certification process later.

Requirement Details

1. **Sales Contract in Place:** Whether a Direct customer or one of our Select, Premier, or Strategic Partners, our business relationship needs to be established prior to starting the full API Certification process. If you are interested in becoming a customer, contact DocuSign Sales at 1.877.720.2040. If you are interested in becoming a partner, apply online at <http://www.docusign.com/partners/become-partner>.
2. **Support:** As the owner of the Integration, you are responsible for providing front line support to users of your integration. As such, in any error or exception messages displayed to the user, the Integration must provide the user with specific contact information to the appropriate path of support at your company. These users should not reach out to DocuSign for assistance.
3. **Sample Requests:** If you contact DocuSign Support for backend assistance on any issues you are seeing, DocuSign may ask you to provide a fully consumable raw HTTPS Request and Response including headers. DocuSign should be able to recreate the event using the provided trace. We are looking for the verb/method, URI, endpoint, authentication method, credentials, and payload. Please be ready to pull this information using a network analyzer or wire sniffer.
4. **20+ Test Transactions:** The 20 test transactions asked for in the API Checklist should show the integration from end-to-end. The tests need to be on a single day and without interference of other testing. These tests must be run using the Integrator Key provided in the API Checklist for promotion. DocuSign will download our server logs during this time period to

validate that no errors occurred and that API requirements are being followed with special attention paid to server polling intervals.

5. **Checklist:** Once the test transactions have been completed, an API Certification Checklist must be submitted through the DocuSign Developer Center. There is a sample API Certification Checklist provided at the end of this document.

Submissions

The API Certification Checklist is available on DocuSign's Developer Center at <https://www.docusign.com/developer-center/go-live/certification>. The checklist will capture basic information on your application, company name, business contact, and technical and business insight on how your integration functions with regards to DocuSign's APIs. Please have all of the information prior to beginning the checklist. For any questions, please email DocuSign's API Certifications team at apicertifications@docusign.com.

Planning

API Certification usually takes around 3 business days, longer if the integration is not following the API Requirements. Please work with your Account Manager if there are any questions prior to starting the API Certification process.

Assistance

DocuSign offers a lot of free resources to aid developers in architecting and building their Integration.

- Our Developer Center provides a large amount of documentation, the API Explorer, our API Walkthroughs, a Mobile SDK, and API Helper Libraries.
- Our Community Support is on Stack Overflow. Developer can ask their DocuSign API integration questions and exploring and provide general knowledge sharing. Most or all questions are technical in nature and require at least basic programming knowledge.
- DocuSign Professional Services has several optional packages available to provide API Integration guidance. Please work with your Account Manager if this is of interest to you.

API Restrictions

DocuSign has imposed a default 1,000 API call per hour limit for each account. This limit ensures resource availability for all account holders, while reducing the chances of a denial of service (DOS) attack. Exceeding this limit will result in your API calls receiving an exception for up to 60 minutes. Applications are not permitted to poll for envelope status more than once every 15 minutes. Excessive calling of the API will result in your API access being revoked. Check out our API Requirements Guide for full details.

When to Recertify

You must recertify when changes are made to the Integration where it interacts with the DocuSign API, especially changes in polling. This will ensure API Requirements continue to be followed.

Post API Certification

Once your integration has successfully passed our API Certification requirements you will need to follow the steps below. Your integrator key from the DocuSign Demo (Developer) environment has been enabled for use in our Production environment. You will use the same integrator key in Production as you used in the development environment.

Please follow the following guidelines for steps prior to going live with your Production integration:

Next Steps after API Certification

1. Point your Integration to the Production environment endpoints:

a. For SOAP

Web Service	From	To
Account Management*	https://demo.docusign.net/api/3.0/AccountManagement.asmx	https://{SERVER}.docusign.net/api/3.0/AccountManagement.asmx
Credential*	https://demo.docusign.net/api/3.0/credential.asmx	https://{SERVER}.docusign.net/api/3.0/credential.asmx
Service*	https://demo.docusign.net/api/3.0/dsapi.asmx	https://{SERVER}.docusign.net/api/3.0/dsapi.asmx
Service – WSE*	https://demo.docusign.net/api/3.0/api.asmx	https://{SERVER}.docusign.net/api/3.0/api.asmx

b. For REST, the base URL for your account is retrieved by using the /login_information uri and is used in future API calls as the base of the request URL. Service information is found here: https://www.docusign.net/restapi/service_information

Web Service	From	To
Get Account Info*	https://demo.docusign.net/restapi/v2/accounts/{accountId}	https://{SERVER}.docusign.net/restapi/v2/accounts/{accountId}
BaseURL*	https://demo.docusign.net/restapi/v2/accounts/{accountId}/	https://{SERVER}.docusign.net/restapi/v2/accounts/{accountId}/
Login Information*	https://demo.docusign.net/restapi/v2/login_information	https://{SERVER}.docusign.net/restapi/v2/login_information

c. *The {SERVER} value is determined by where your DocuSign Production account resides. The easiest way to determine this is to login to your Production DocuSign account and examine the prefix of the URL. For example, if the URL is: <https://na2.docusign.net/Member/Home.aspx>, then replace {SERVER} with “na2” to find your Production endpoints.

i. There are presently 3 Production server instances: “www” “na2” “eu1”

- d. If you are building a partner integration, you must first determine the BaseURL from the Login call which will then be used for the remainder of the API calls. The BaseURL is determined based on where the customer's Production DocuSign account resides.
 - i. More information for DocuSign's SOAP API available here:
<https://www.docusign.com/p/APIGuide/APIGuide.htm#Credential%20API/Login.htm>
 - ii. More information for DocuSign's REST API available here:
<https://www.docusign.com/p/RESTAPIGuide/RESTAPIGuide.htm#REST%20API%20References/Login.htm>
 2. If you have an Intrusion Prevention System (IPS) or Deep Packet Inspection (DPI) in your network, please add the following common knowledge IP addresses:
 - 209.67.98.1 through 209.67.98.63
 - 206.25.247.129 through 206.25.247.159
 - 209.46.117.161 through 209.46.117.191
 - 162.248.184.1 through 162.248.187.255Further information is available at: <https://trust.docusign.com>
 3. Additionally, you should allow your system receive emails from the following senders:
 - dse@docusign.net (email from NA1)
 - dse_na2@docusign.net (email from NA2)
 - dse_eu1@docusign.net (email from EU1)
 - dse_demo@docusign.net (email from DEMO)
 4. Add Users to Production.
 - a. In DocuSign's Web Console, on the upper right click the down arrow and select Preferences.
 - b. Under Account Administration, select Users.
 - c. You can add Users individually using the New icon.
 - d. Or, you can upload a list of Users using the New/CSV file and choosing the appropriate CSV.
 5. Where your Integration uses the Account ID and User ID, update these to their Production environment values.
 6. Move your templates from Demo to Production.
 - a. In DocuSign's Web Console, go to Manage tab.
 - b. On left, select Templates, My Templates to display your templates
 - c. On upper right, select Actions Button, Download Template(s).
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- d. The templates are saved as XML files.
 - e. Simply go to the new account and Upload Template(s) in the Actions Button and selecting that XML file.
 - f. Update integration code/configuration to use newly assigned TemplateIds.
7. Move your branding from Demo to Production.
- a. In DocuSign's Web Console, on the upper right click the down arrow and select Preferences
 - b. Under Account Administration, select Branding.
 - c. Click the 'Export' next to the Edit link.
 - d. The brand is saved as an XML file.
 - e. Simply go to the new account and come back to Branding.
 - f. Select the 'plus sign' to add a brand.
 - g. Select the Import Brand and choose the XML file to upload.

Security Certificates

8. If your integration uses Embedded Signing and/or DocuSign Connect Service, you may have to implement your SSL or X509 Certificate.
- a. For Connect, please review our DocuSign Connect Service Guide, link provided below. You are required to provide a secure listener or an x509 Certificate.
 - b. If you use an x509 Certificate for Embedded Signing, please send your Account Manager the x509 Certificate's Common Name, Issuer's Name, Version, Serial Number, and Valid From and Valid To dates.

Links

DocuSign DevCenter: <http://www.docusign.com/developer-center>

DocuSign Documentation & Developer Guides: <https://www.docusign.com/developer-center/documentation>

API Requirements + Connect Guide: <https://10226ec94e53f4ca538f-0035e62ac0d194a46695a3b225d72cc8.ssl.cf2.rackcdn.com/api-requirements-w-connect-guides.pdf>

Partner Solutions Showcase: <http://www.docusign.com/developer-center/go-live/marketplace>

Sample API Certification Checklist

DocuSign API Certification Checklist

Please fill in the fields below to begin DocuSign API Certification. Completing the DocuSign API Certification process validates that this integration adheres to DocuSign's security and design requirements.

If you are a System Integrator (SI) building on behalf of a partner or customer, please note that the partner or customer is the owner of the integration & integrator key. *Please ensure that the partner or customer enters the required information for their certification.*

1. Company Name:
2. Business Contact Name:
3. Business Contact E-mail Address:

4. You acknowledge that you must be a direct customer or one of our Select, Premier, or Strategic Partners prior to beginning the DocuSign API Certification process. If you are interested in becoming a customer, contact DocuSign Sales at 1.877.720.2040. If you are interested in becoming a partner, apply online at <http://www.docusign.com/partners/become-partner>.
 - a. DocuSign Customer or Partner Agreement in Place

5. Select that option that best applies to this integration:
 - a. Customer – this integration is for your company's use *only* and is not intended for distribution to customers
 - i. Production DocuSign Account ID:
 - b. Partner – this integration will be used by customers bringing their own DocuSign account credentials
 - i. I am interested in showcasing my partner integration in DocuSign's Partner Solution Showcase, an area of our website dedicated to describing partner solutions (<https://www.docusign.com/partners/solution-showcase>). Your listing describes your product and is a great marketing mechanism to drive DocuSign's customers to learn more about your solution and company.
 - ii. Please provide a high-level summary of how DocuSign is being utilized within your solution (200 words max):

6. Targeted Production Go Live Date:

7. Was this integration built by a System Integrator (SI)?

If so, please fill in the following:

- a. SI Company Name:
- b. SI Primary Contact Name:
- c. SI Primary Contact Email:

8. Which API(s) is this integration consuming?

_____ SOAP _____ REST _____ Both

9. Integrator Key from **Demo** to be enabled for use in **Production**:

The Integrator Key is managed from the DocuSign Demo environment (<https://demo.docusign.net>) and is the same integrator key that will be associated with your Production integration and must also match the integrator key in your submitted API test transactions. You can find this in your Demo account by navigating to Preferences->API.

Integrator Key:

10. DocuSign Demo API Account Number:

11. Test Transactions:

The 20 test transactions show the integration from end-to-end. The tests need to be on a single day and without interference of other testing. For this date, DocuSign will evaluate the API server logs based upon the integrator key provided to validate that the logs are free of errors and meet DocuSign's API requirements. Special attention will be paid to excessive polling as defined in the API requirements guide.

Date of 20+ Test Transactions:

12. This is a recertification (the integrator key is already certified):

13. You acknowledge that you may need to provide a fully consumable raw HTTPS request and/or response including headers to DocuSign Customer Service for troubleshooting API related issues.

14. You affirm that users of this API integration are not directed to DocuSign Support in case of any error or exception within your integration.

DocuSign API Certification Resources

Please review the following documents available at:

<https://www.docusign.com/developer-center/documentation>

- 1) **API Requirements + Connect Guide:** This guide provides information about the best practices to use when making calls to the DocuSign SOAP and REST APIs. In addition it also provides an overview of the Connect publisher service and data elements that are available.
- 2) **Post Certification API Info:** This guide outlines recommendations to follow when moving from Demo to Production after API Certification is complete.

Name: _____ **Date:** _____

By signing, the solution owner affirms that their DocuSign API Integration is complete, follows DocuSign API Requirements, is ready for a live end to end demonstration without major code changes, and is ready for DocuSign API Certification's review. For non-partner integrations, the account settings from the Demo account specified above will be copied to your Production DocuSign account.

DocuSign Personnel to complete below

Integrator Key	
Production Account Name	
Production Account ID (GUID)	
Environment	
Compliance Review Complete	
Enabled in Production	

20+ Test API Transactions Logs Attached Below
