USER GUIDE

PandaDoc Document Management for Creatio

Creatio Integration with PandaDoc

About Creatio

Creatio (formerly bpm’online) is a leading low-code, process automation and CRM company. It has been highly recognized as a market leader by key industry analysts. Creatio’s intelligent platform accelerates sales, marketing, service and operations for thousands of customers and hundreds of partners worldwide. The mission of Creatio is to help companies ACCELERATE!

About PandaDoc

Too often, modern businesses still use dated processes because of habit or comfort. This wastes tremendous amounts of time and has a negative effect on the bottom line. PandaDoc team is working hard to rebuild the document process to allow businesses to achieve greater results with less effort. Your time is precious, PandaDoc helps you win it back.

About the Integration

Creatio Integration with PandaDoc includes the following capabilities.

1. Create PandaDoc documents via Creatio portal.
2. Automatically populate Creatio data in PandaDoc documents (populate tokens, fields, contact roles, quote lists).
3. Track status and manage documents related to a specific entity (Opportunity, Lead, or Account) in Creatio.

Velvetech Contact

E-mail: creatio-pandadoc@velvetech.com

Phone: 847.559.0864

Versions of Creatio that support this Integration

Bpm’online 7.10 and up

Creatio 7.15 and up

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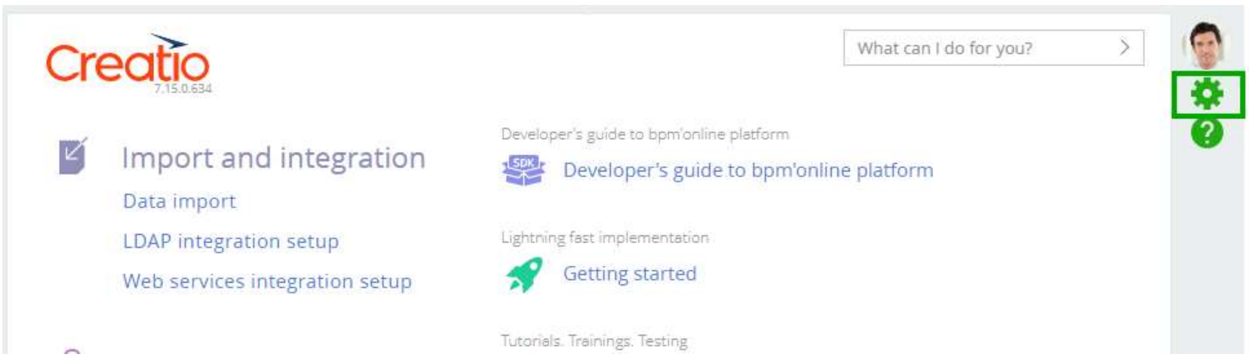
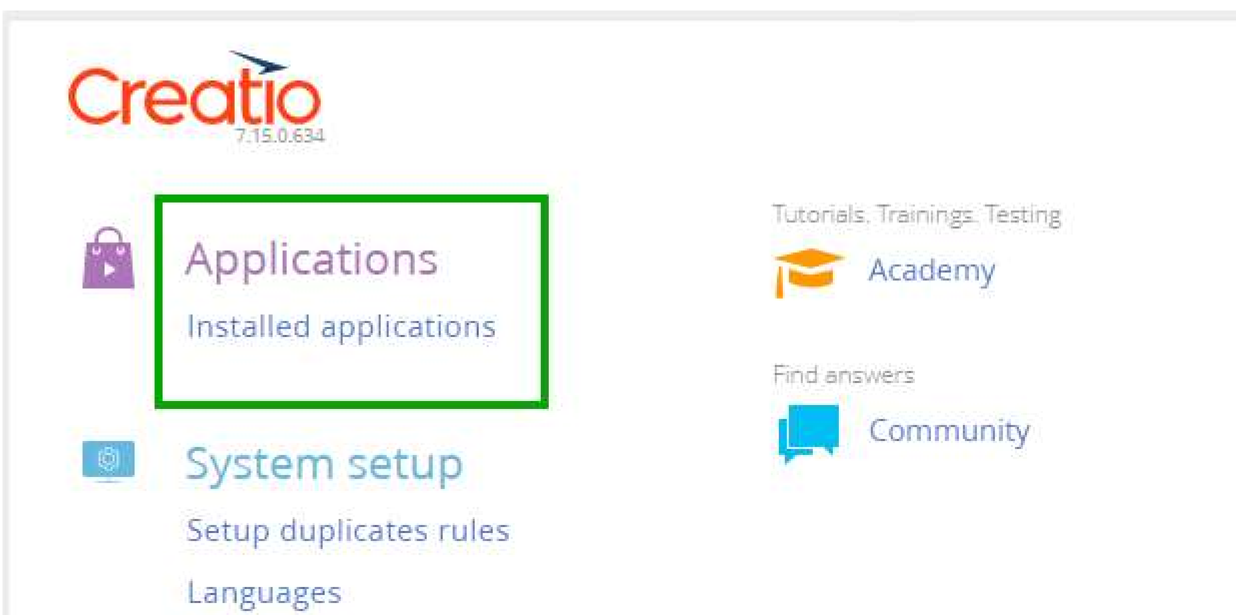
Enable PandaDoc Integration

1. To enable integration with PandaDoc, contact Velvetech to receive the installation package for Creatio and contact Creatio to purchase licenses or receive trial licenses for the connector.
   Email: creatio-pandadoc@velvetech.com
   Phone: 847.559.0864

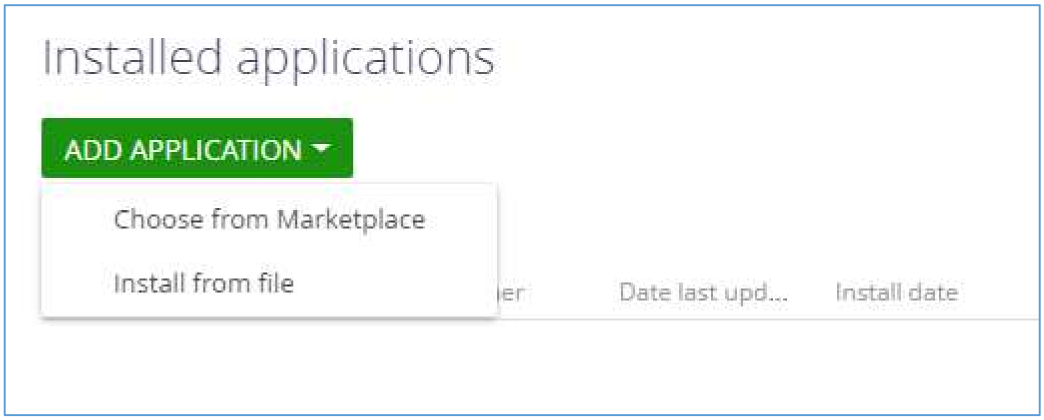
2. Log in Creatio as system administrator and visit System Designer page.



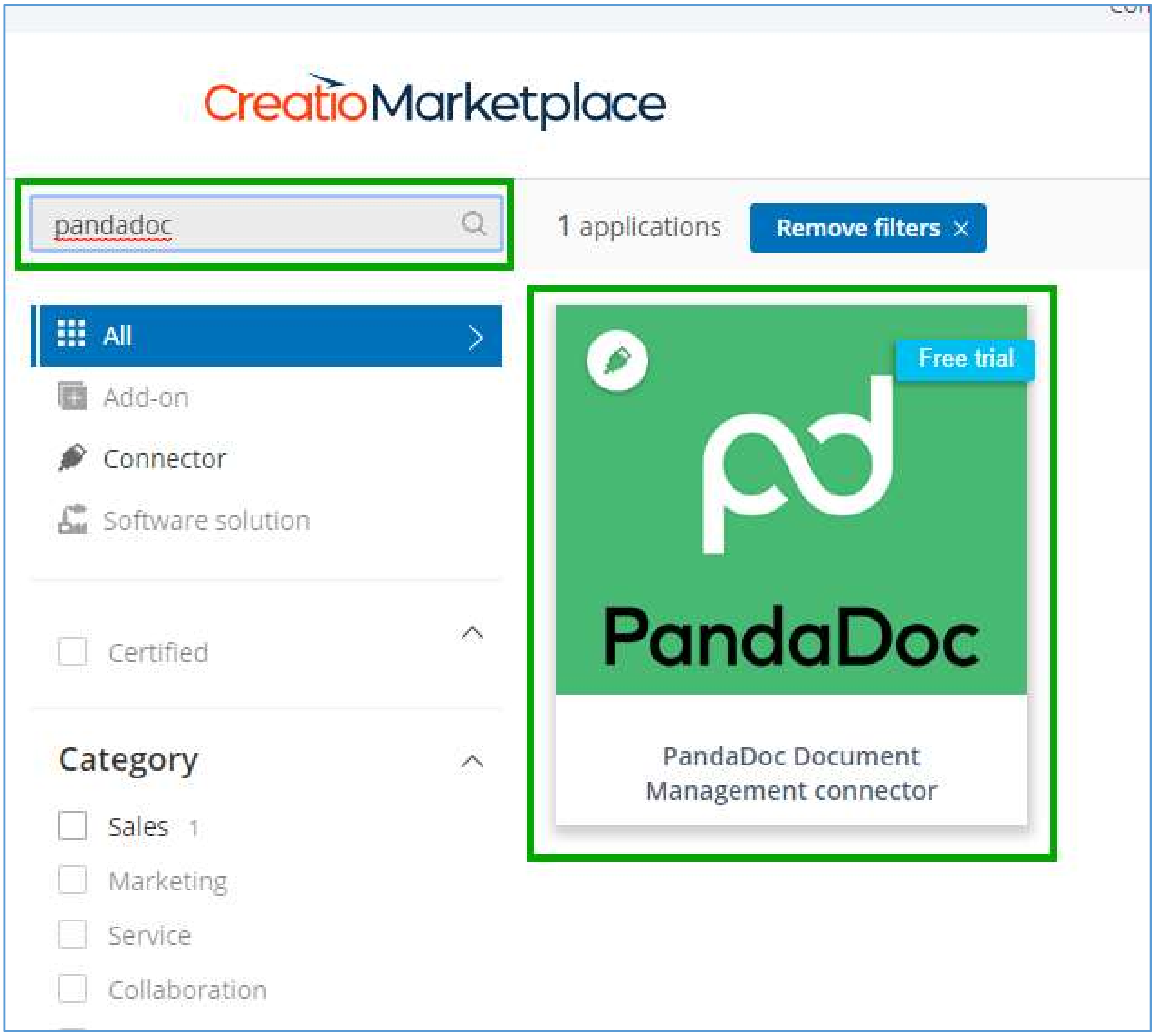
3. Navigate to Applications --> Installed applications.



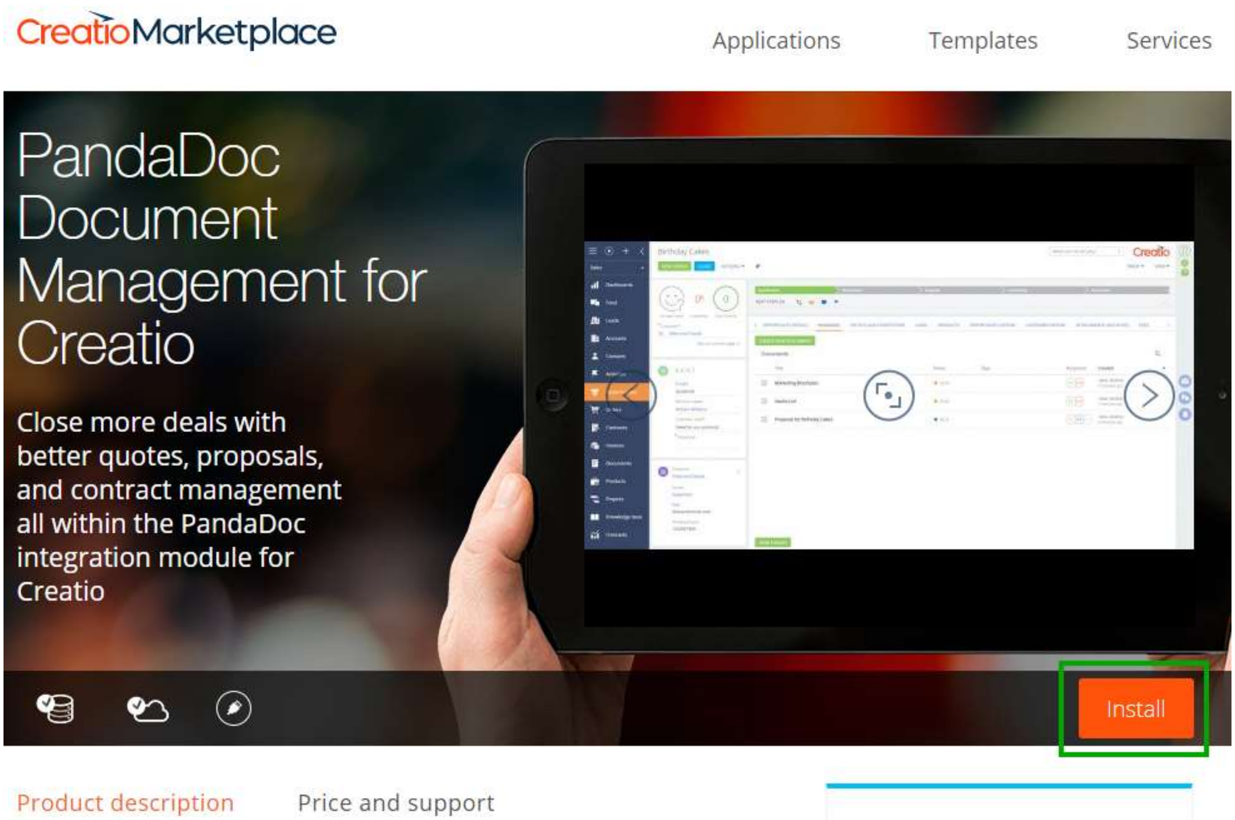
4. Click ADD APPLICATION.



a. Choose from Marketplace.
This option will only work for you if you have a Creatio Marketplace account and your Creatio instance is in cloud.
Click Choose from Marketplace. You will be redirected to Creatio Marketplace. Search for PandaDoc and click on the connector page.

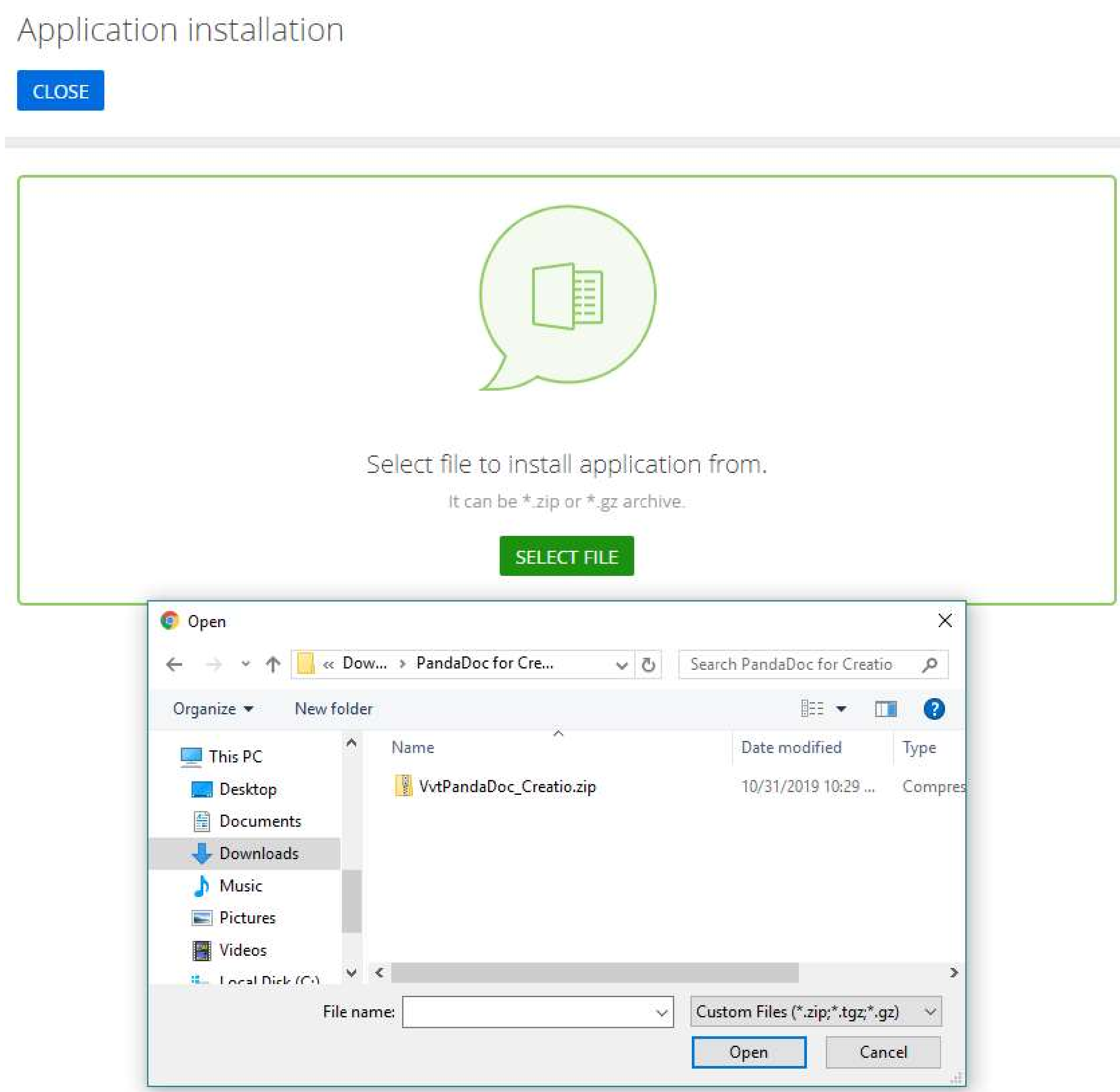


Click “Install” on the connector page.

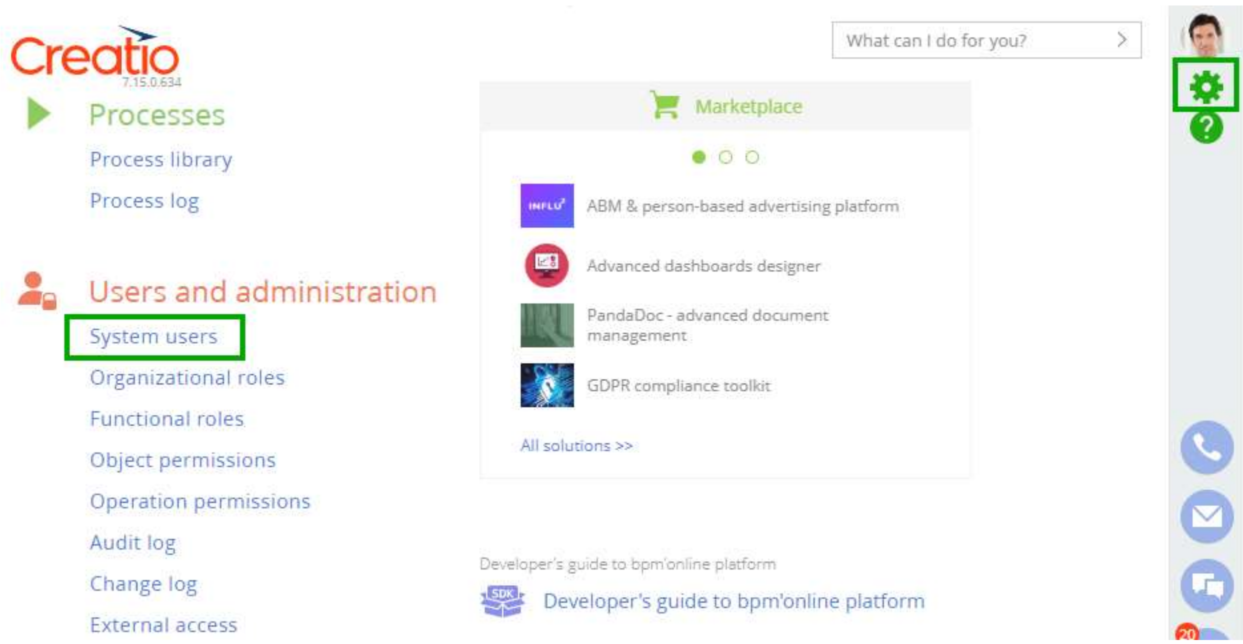


You will be asked to log in Creatio Marketplace and select the Creatio instance you are using. As soon as you do, the installation will start.

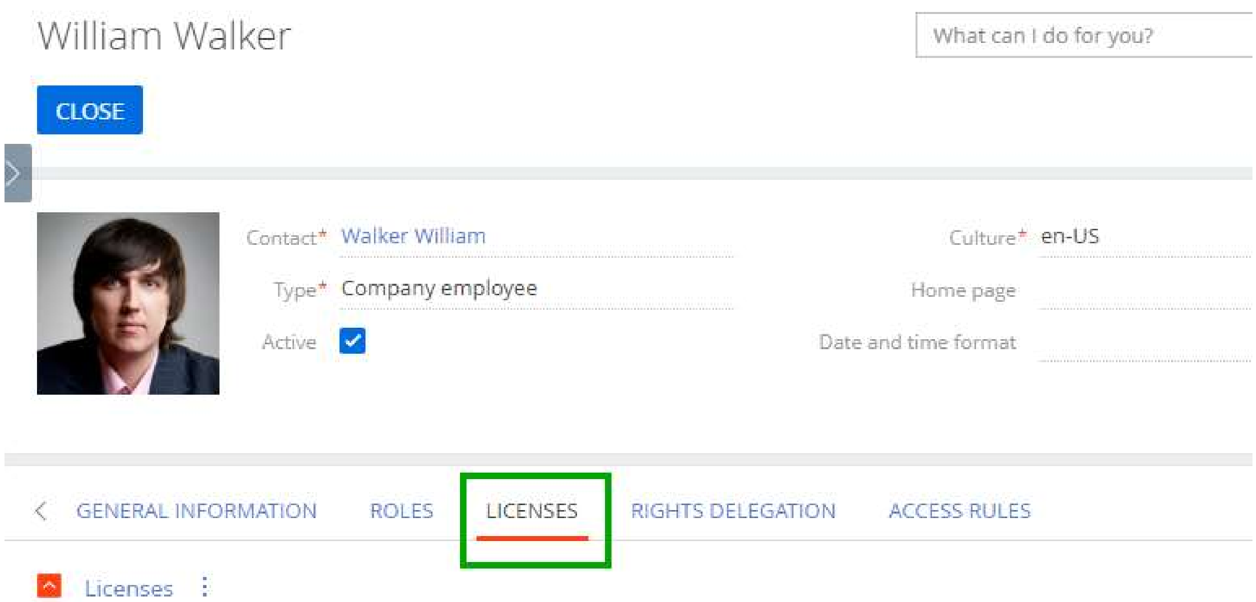
b. Install from file.
   If you have the connector package on your hard drive, click "Install from file" and select the file.



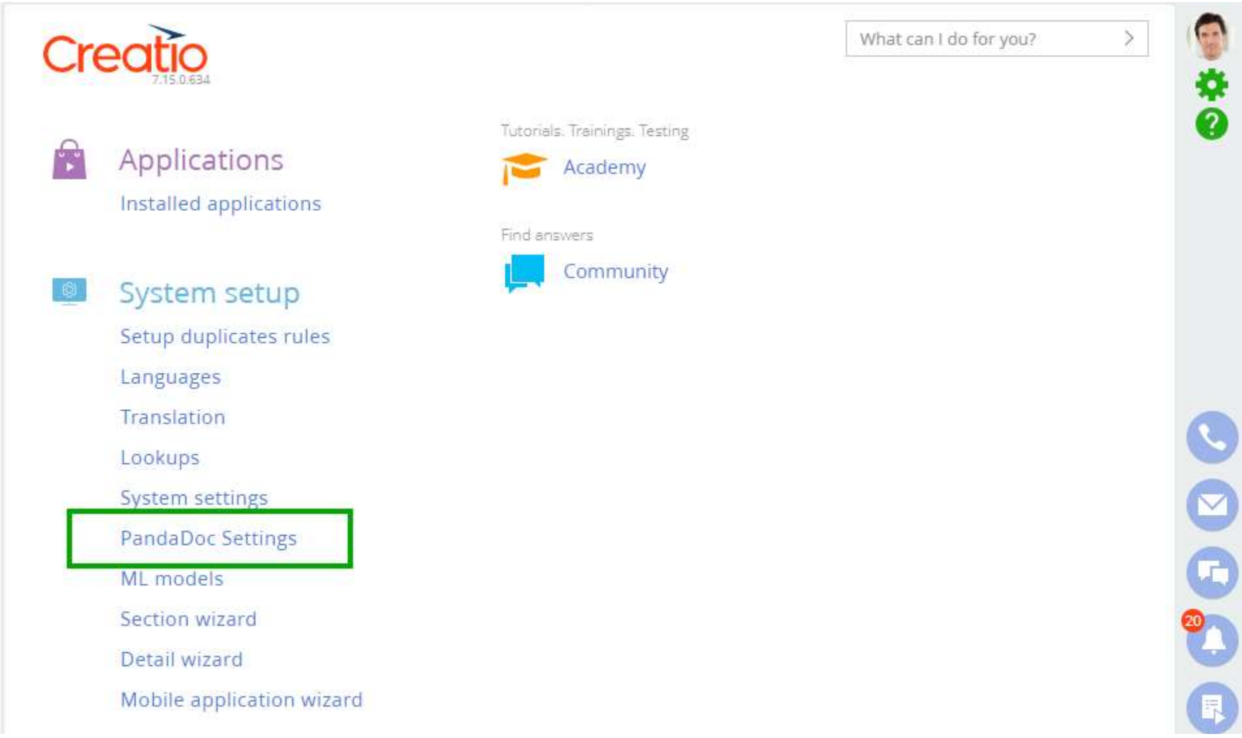
5. Assign connector licenses to users.
   Access System Designer --> System Users



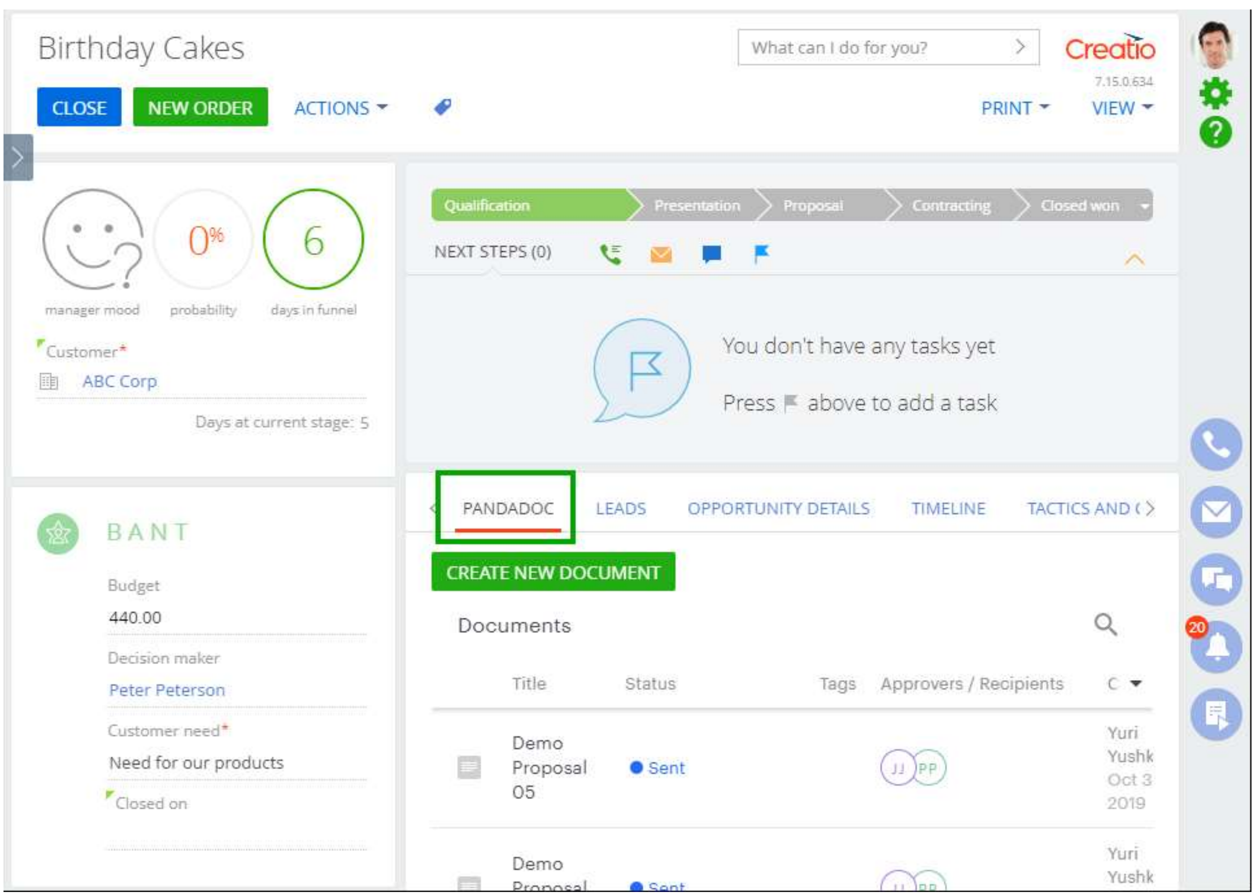
Find the user you want to assign a license to, open the user and go to LICENSES tab. Check the license and save.



6. Now if you log in under the user who has the license assigned, you will see PandaDoc Settings on System Designer page.

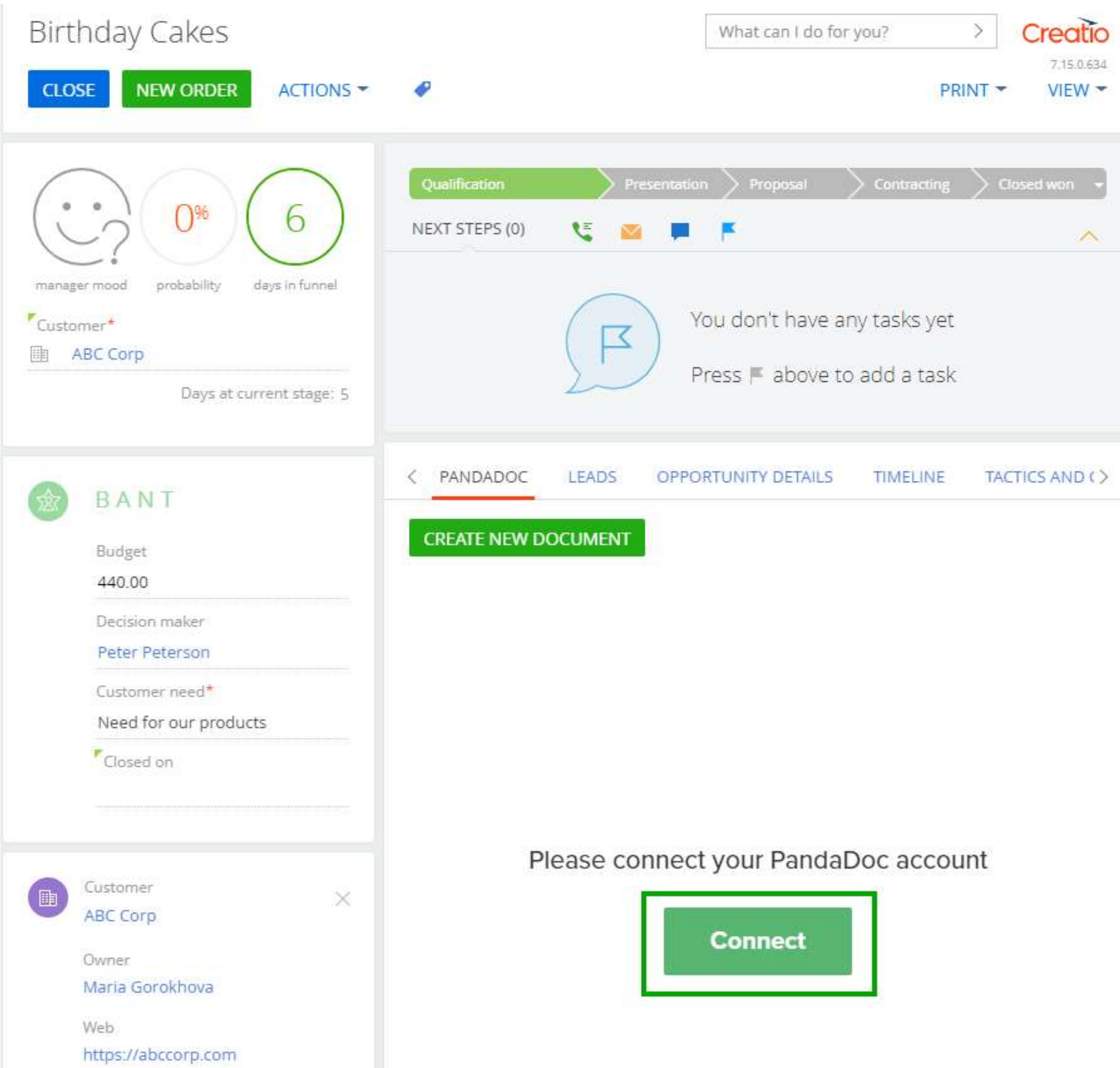


7. You will also see “PANDADOC” tab in Opportunities, Leads, and Accounts.



These are the only two components that you will need for your integration. Please find more details below.

8. To use PandaDoc integration, you need to be logged in your PandaDoc account in the same browser as you are using for Creatio. You can also log in PandaDoc in Creatio.



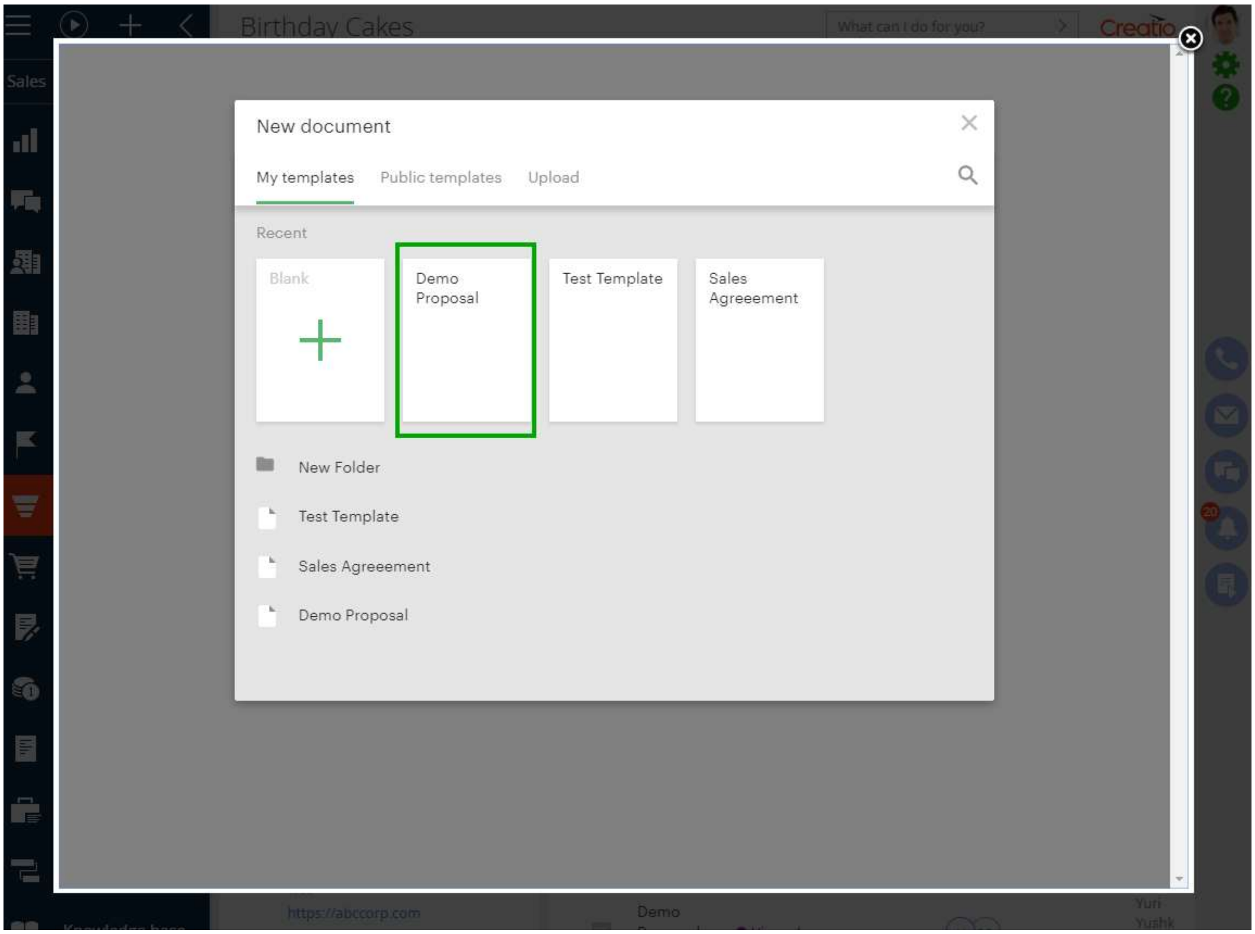
PandaDoc login page will open in a new tab. Log in and refresh the Creatio page.

Use PandaDoc Integration

The integration allows populating tokens, fields, contact roles, and quote lists in PandaDoc documents. Installing PandaDoc module in Creatio enables default tokens and fields population that cover all major data points of Opportunities, Leads, and Accounts.

1. Create a PandaDoc document

a) Open an Opportunity, Lead or Account you need.
b) Click on PANDADOC tab and Create New Document button. PandaDoc screen will open in a popup window.
c) Select the template you need.

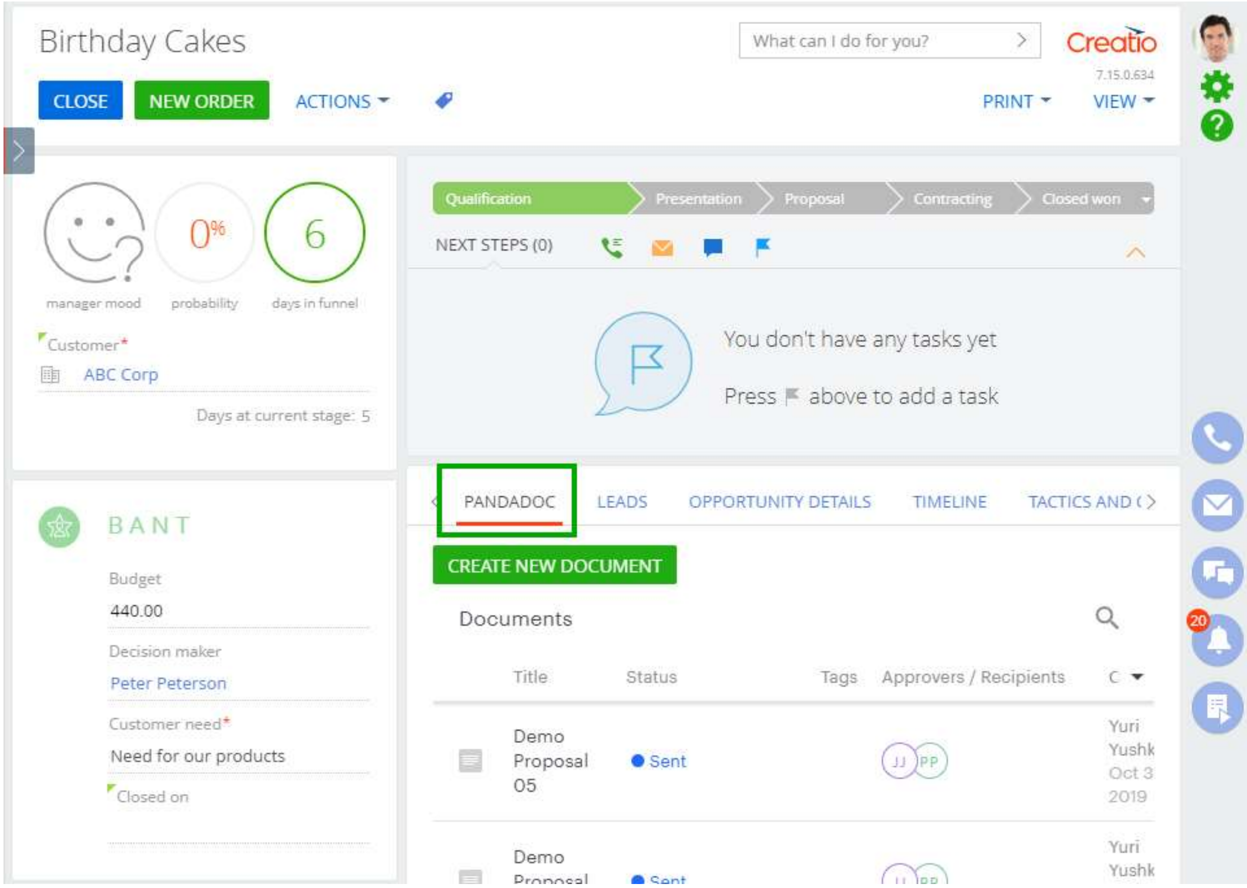


2. Populate PandaDoc tokens

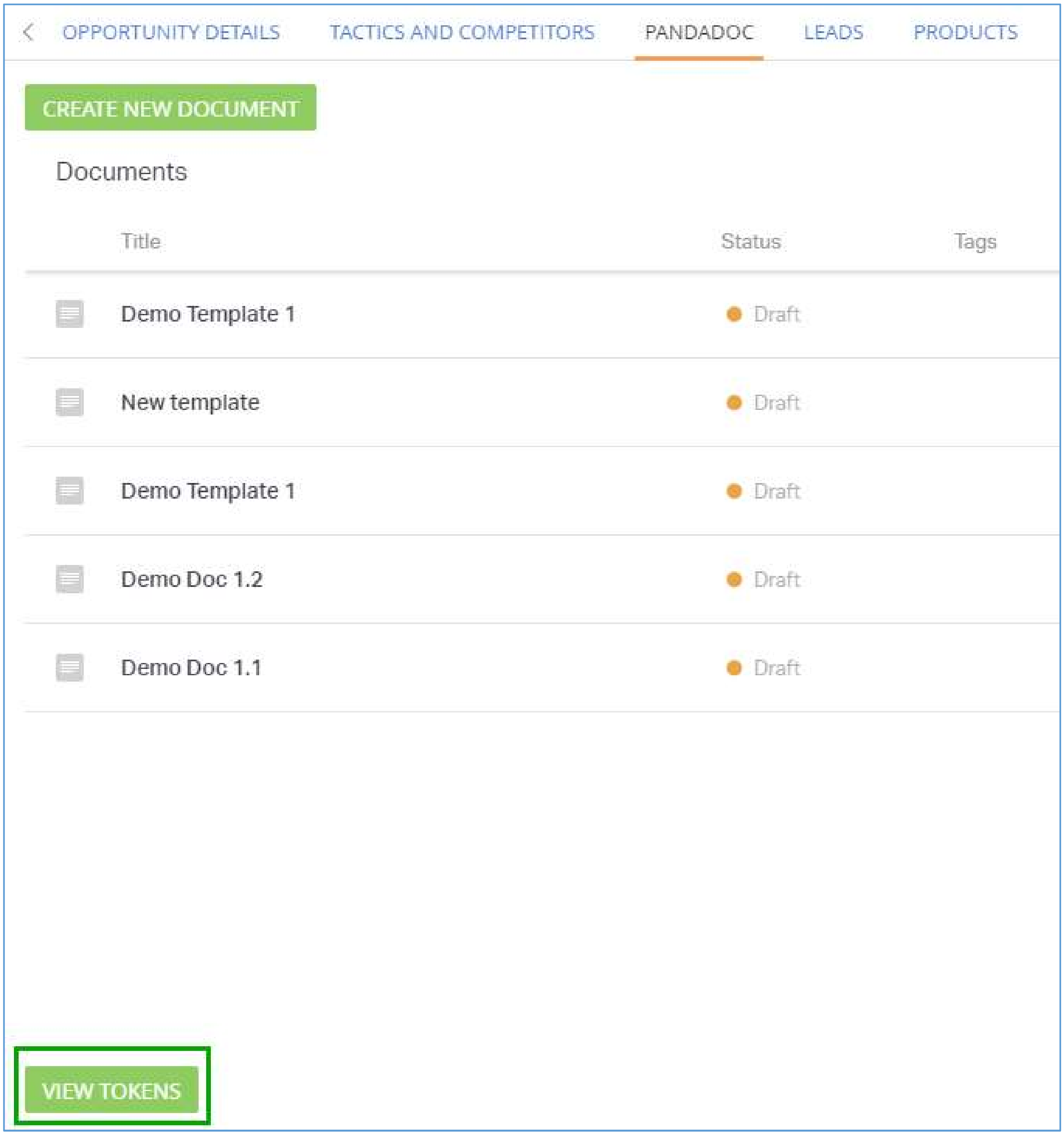
A token is a piece of code that you can insert into a “content block” that will auto-fill your information. For example, if you have filled out Client fields (First Name, Last Name, Company Name, Email address) for your client contact, you can insert in a token to auto-fill that in your document. Learn more about tokens here.

To view the list of tokens you can populate in PandaDoc documents, do the following (the steps below describe Opportunity as an example, but you can do the same for Leads and Accounts).

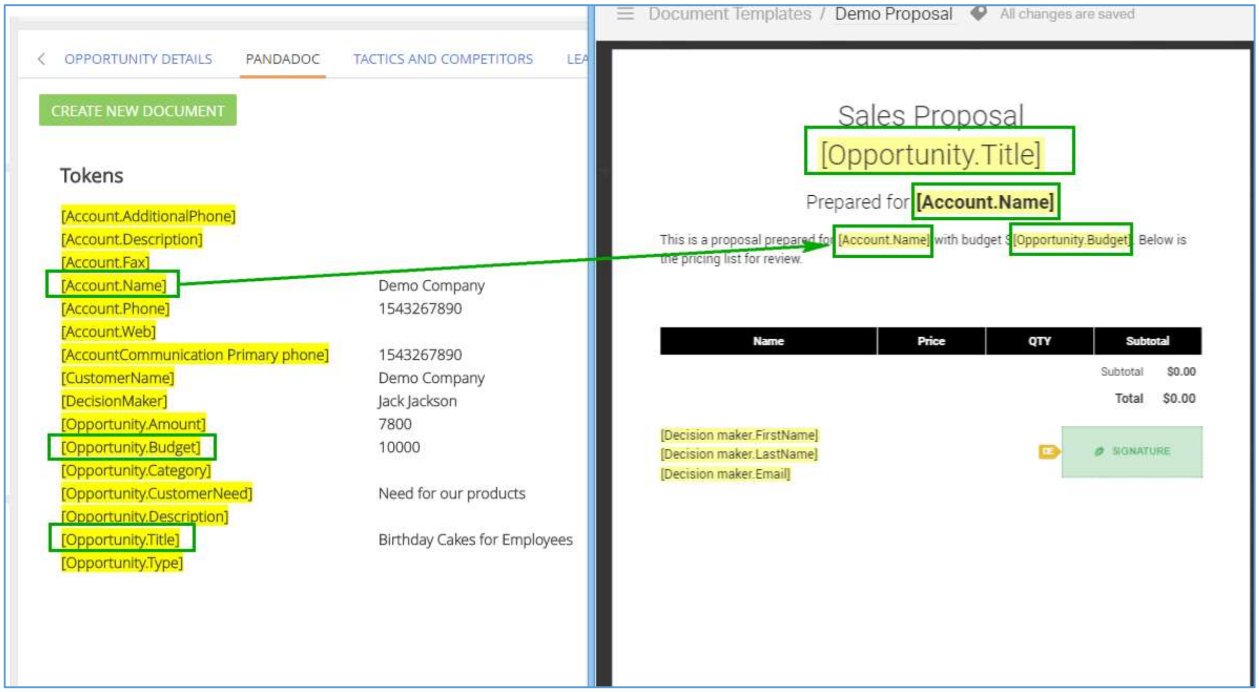
a) Open the opportunity record and click on PANDADOC tab.



b) Click VIEW TOKENS button.



c) This is the list of all tokens that will be populated in a document. To enable the data to be populated, just copy and paste the tokens to your PandaDoc template.



d) Please note that tokens for not only Opportunity fields are populated in PandaDoc, but if an Opportunity has a related Account, any account's data can be populated too.

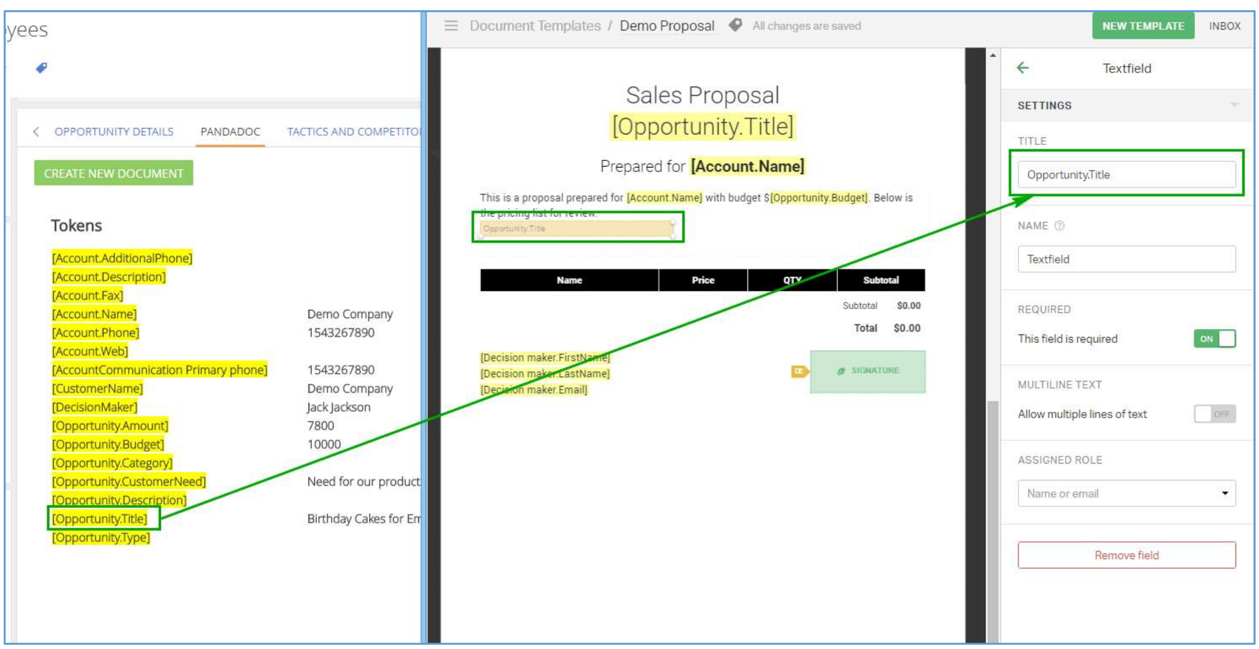
List of tokens you can use

Creatio Record Type	Token to Use in PandaDoc
Lead	[Lead.Account] [Lead.Contact] [Lead.Country] [Lead.Email] [Lead.JobTitle] [Lead.MobilePhone] [Lead.Name] [Lead.Website]
Account NOTE: for contact information such as address, phone, email the token is generated dynamically. For example, if you add address with type "actual" in Creatio, specific tokens will be generated for this type of address: [AccountAddress Actual Address] [AccountAddress Actual City] [AccountAddress Actual CountryName] [AccountAddress Actual RegionName] [AccountAddress Actual Zip]	[Account.AdditionalPhone] [Account.Description] [Account.Fax] [Account.Name] [Account.Phone] [Account.Web] [AccountAddress Actual Address] [AccountAddress Actual City] [AccountAddress Actual CountryName] [AccountAddress Actual RegionName] [AccountAddress Actual Zip] [AccountCommunication Email]

You will only be able to view these tokens if you complete this data in Creatio. If the record has no actual address, actual address tokens will not be displayed for this record.	[AccountCommunication Primary phone]
Opportunity Note: all tokens available for the account related to the opportunity are also available for this opportunity.	[CustomerName] [DecisionMaker] [Opportunity.Amount] [Opportunity.Budget] [Opportunity.Category] [Opportunity.CustomerNeed] [Opportunity.Description] [Opportunity.Title] [Opportunity.Type]
Custom fields	If a custom field is added to Lead, Account, Opportunity, a token for this custom field must be created manually. Please see #3b below for details.

3. Populate PandaDoc fields

Fields are populated for Opportunity, Lead, and Account in the same way as tokens. You just need to copy available tokens from PandaDoc widget without the square brackets and add them to your PandaDoc templates as fields. Field title must be exactly the same as token name in Creatio.



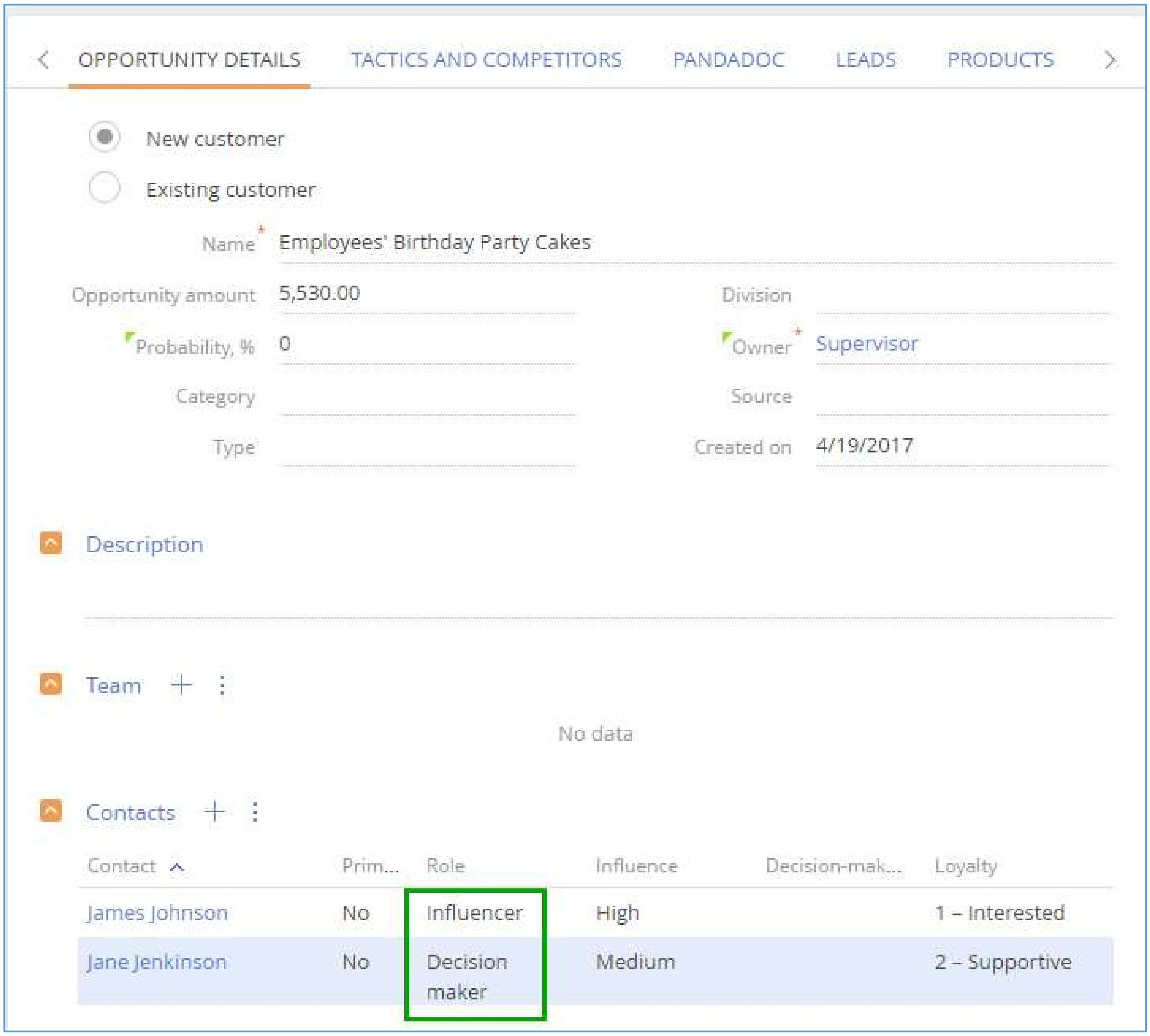
4. Populate PandaDoc contact roles

Roles are added to templates to help predefine the fields and to autofill tokens when you use a template for a document. So, if you set up a role called Signer, all you have to do is assign a recipient to that role when you create a document based on this template. Learn [more about PandaDoc contact roles here](#).

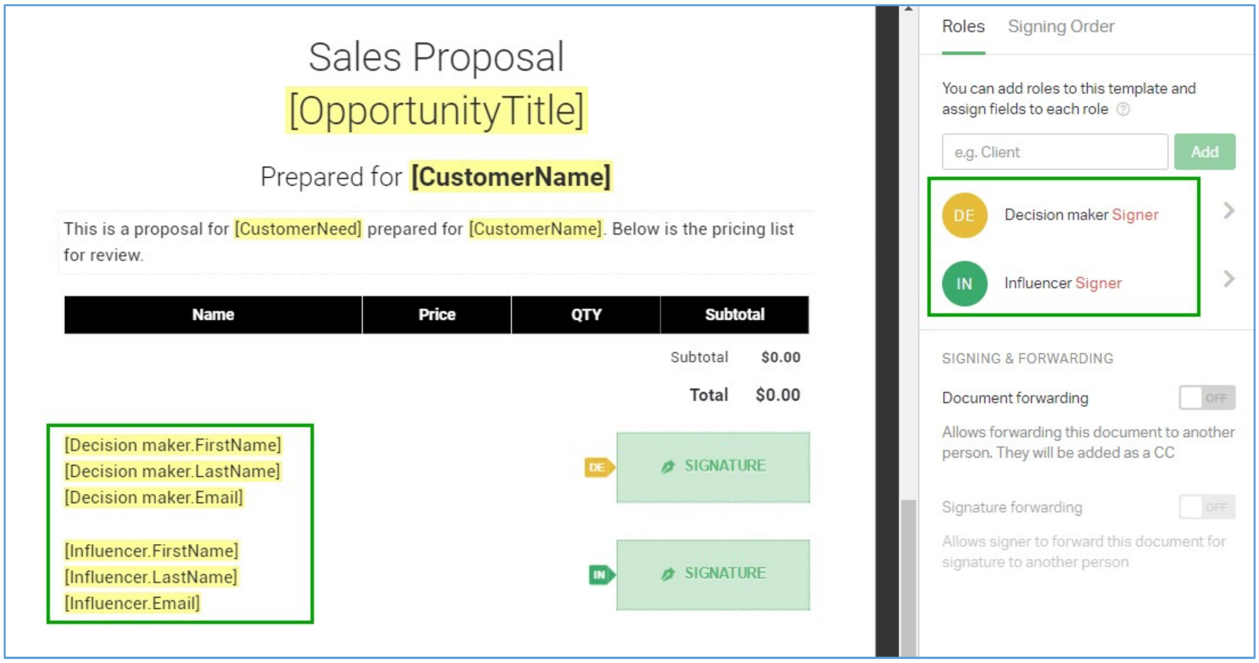
Contact roles integration is only available for Opportunity. In order for contact roles to be populated in PandaDoc, you need to name Roles in Creatio in the same way as in PandaDoc, case sensitive, or, vice versa, name PandaDoc roles in the same way as in Creatio, case sensitive.

Example

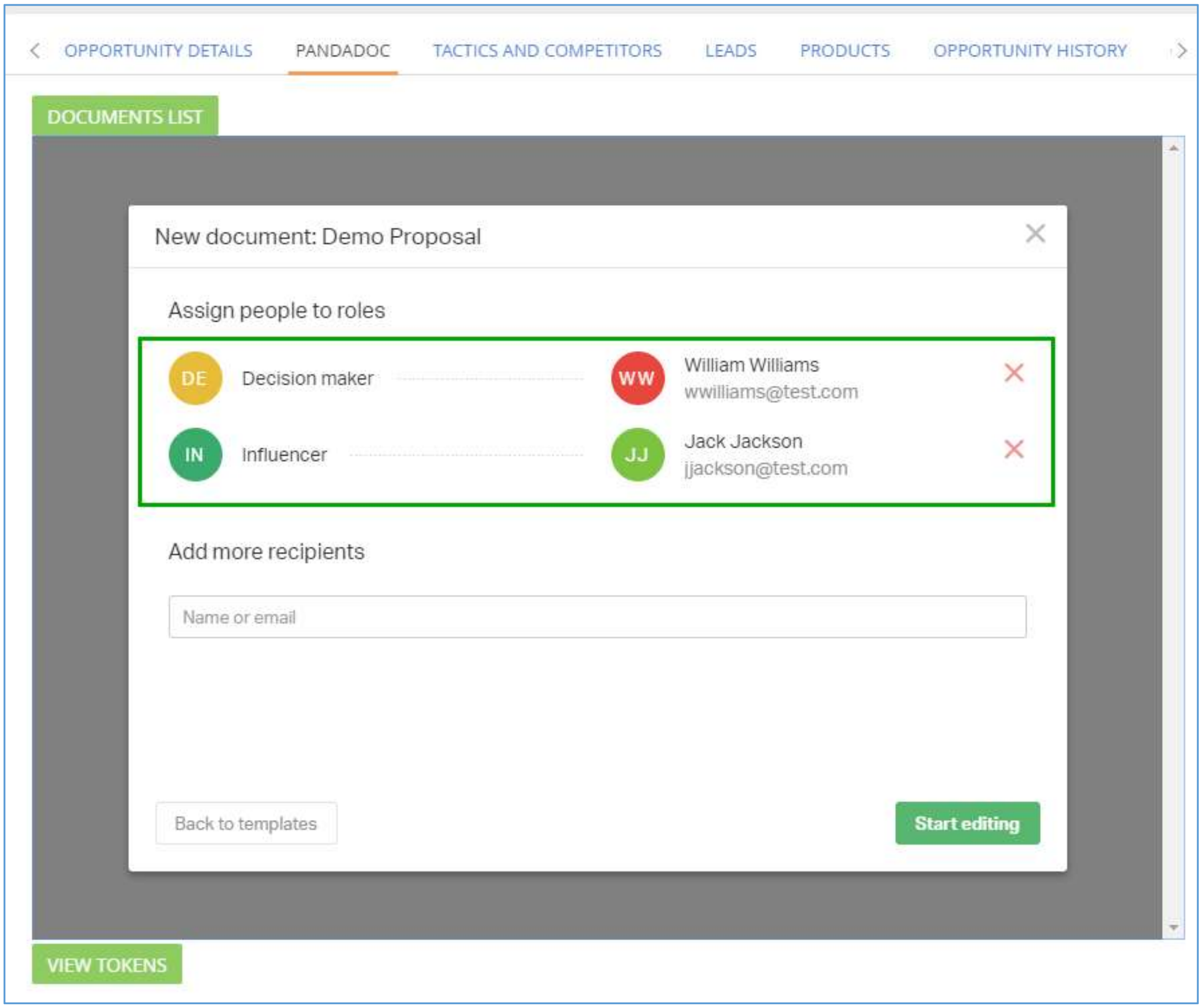
An opportunity has contacts with Influencer and Decision maker roles.

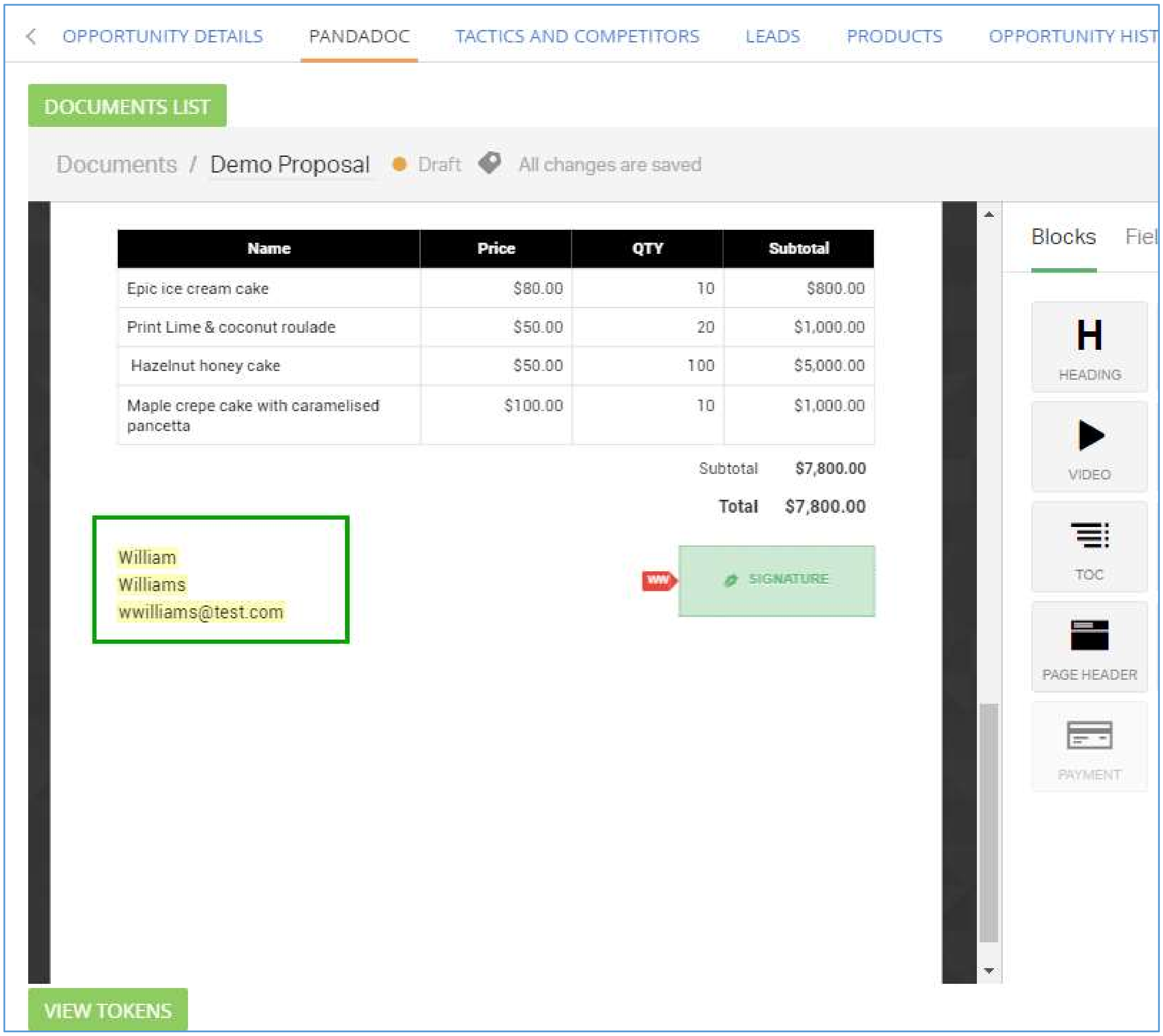


PandaDoc has contact roles with the same names assigned to the template. The template also includes these contact roles' tokens in it.



When you create a PandaDoc document based on this template, the contacts and tokens will be automatically populated in the document.


OPPORTUNITY DETAILS
PANDADOC
TACTICS AND COMPETITORS
LEADS
PRODUCTS
OPPORTUNITY HISTORY
DOCUMENTS LIST
New document: Demo Proposal
Assign people to roles
DE
Decision maker
WW
William Williams
wwilliams@test.com
IN
Influencer
JJ
Jack Jackson
jjackson@test.com
Add more recipients
Name or email
Back to templates
Start editing
VIEW TOKENS



The following fields and tokens are supported for contacts.

Creatio Field	PandaDoc Token
first_name	[rolename.FirstName]
last_name	[rolename.LastName]
email	[rolename.Email]
company	[rolename.Company]
phone	[rolename.Phone]
country	[rolename.Country]
state	[rolename.State]

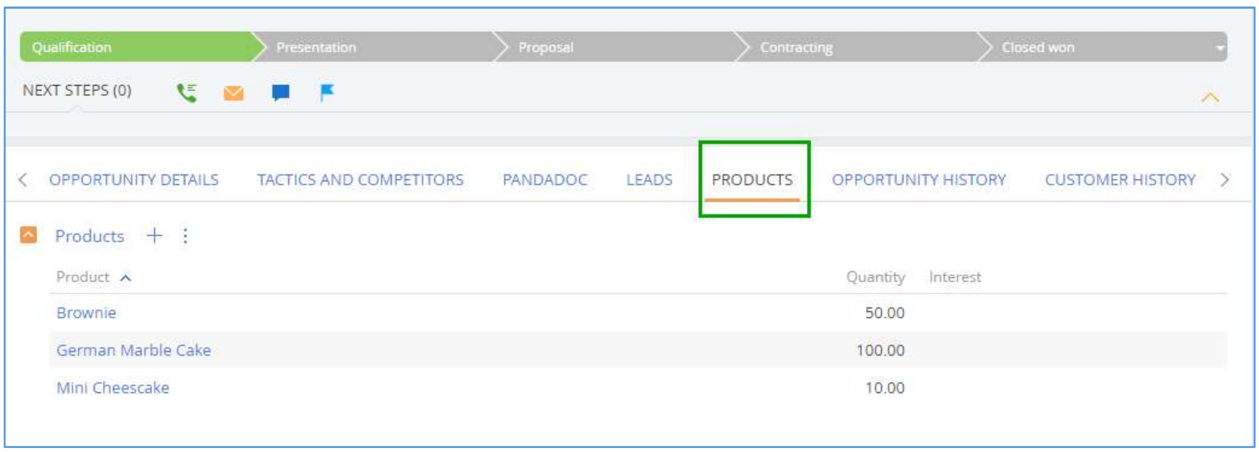
street_address	[rolename.StreetAddress]
city	[rolename.City]
Postal_code	[rolename.PostalCode]

5. Populate PandaDoc quote list

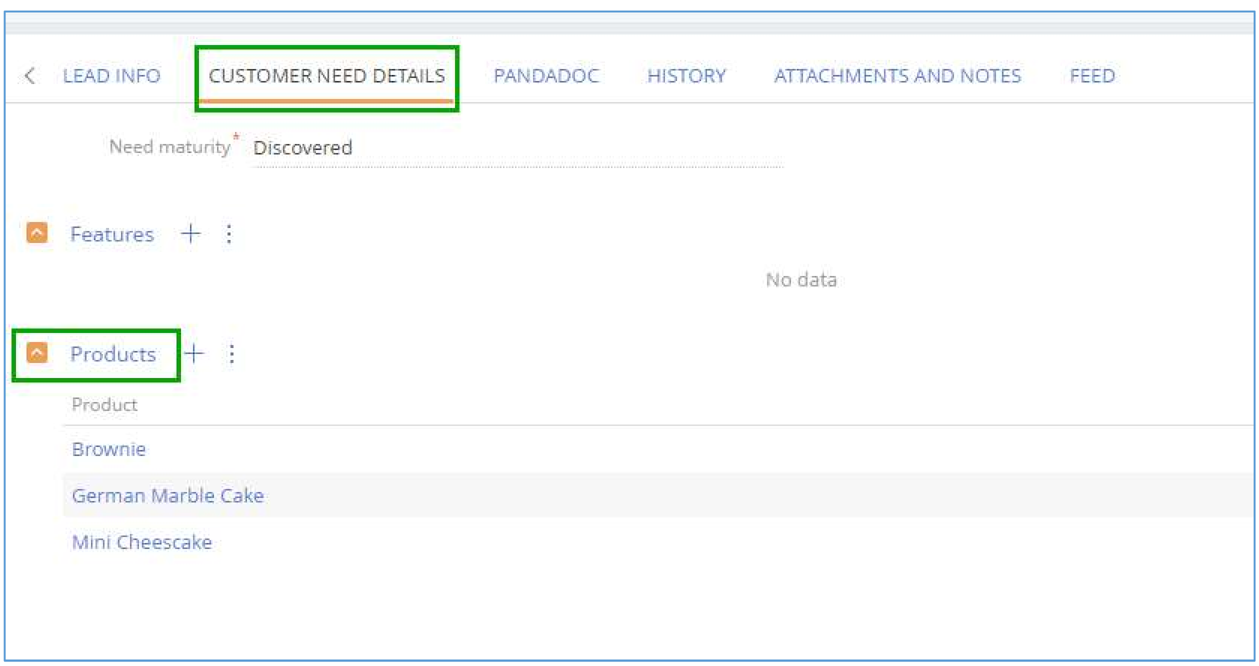
Populating a Pricing Table is available for Opportunities and Leads.

Opportunities – products attached under PRODUCTS tab are populated in PandaDoc document.

NOTE: Quantity and Price will be populated in PandaDoc as well.

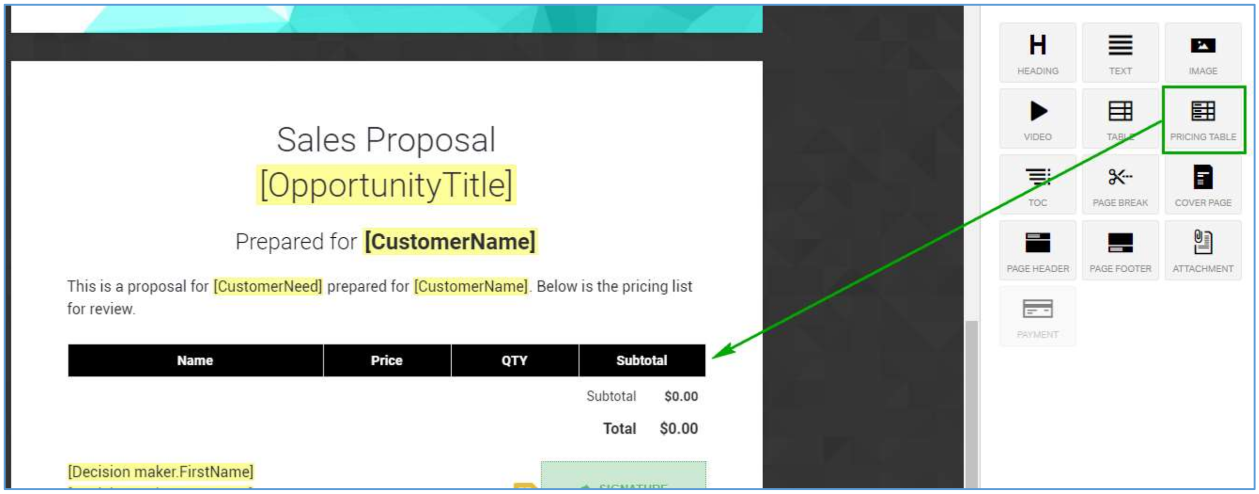


Leads – products attached under CUSTOMER NEED DETAILS tab --> Products. You will need to enter Quantity and Price in PandaDoc manually.

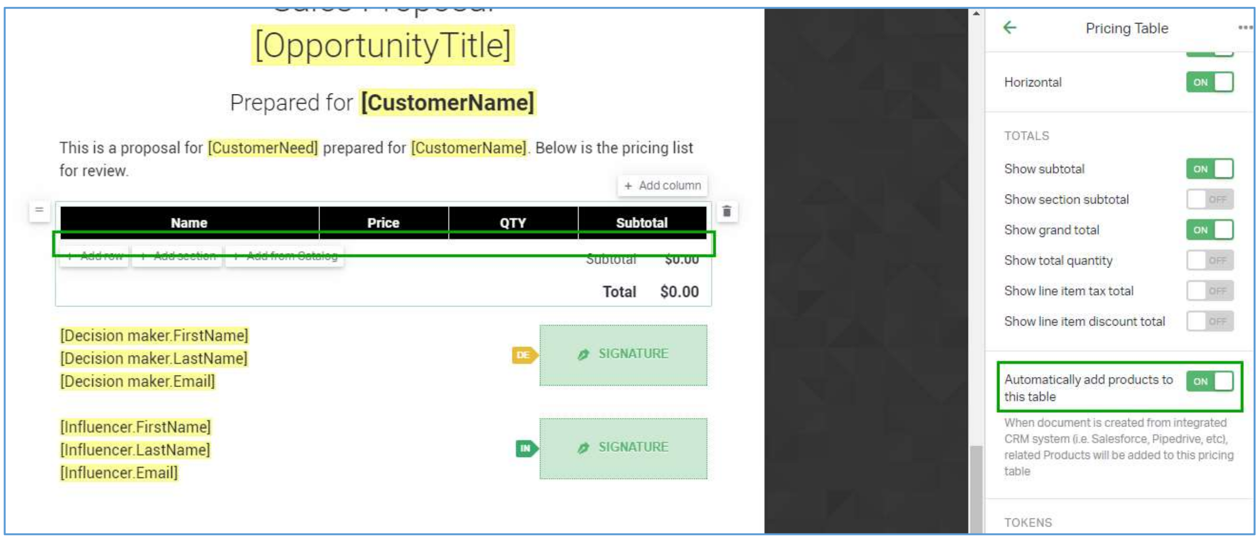


To enable products to be populated in PandaDoc pricing table, please do the following.

1) Add Pricing Table block into the template.



2) Remove the first line of the table and enable "Automatically add products to this table" option.



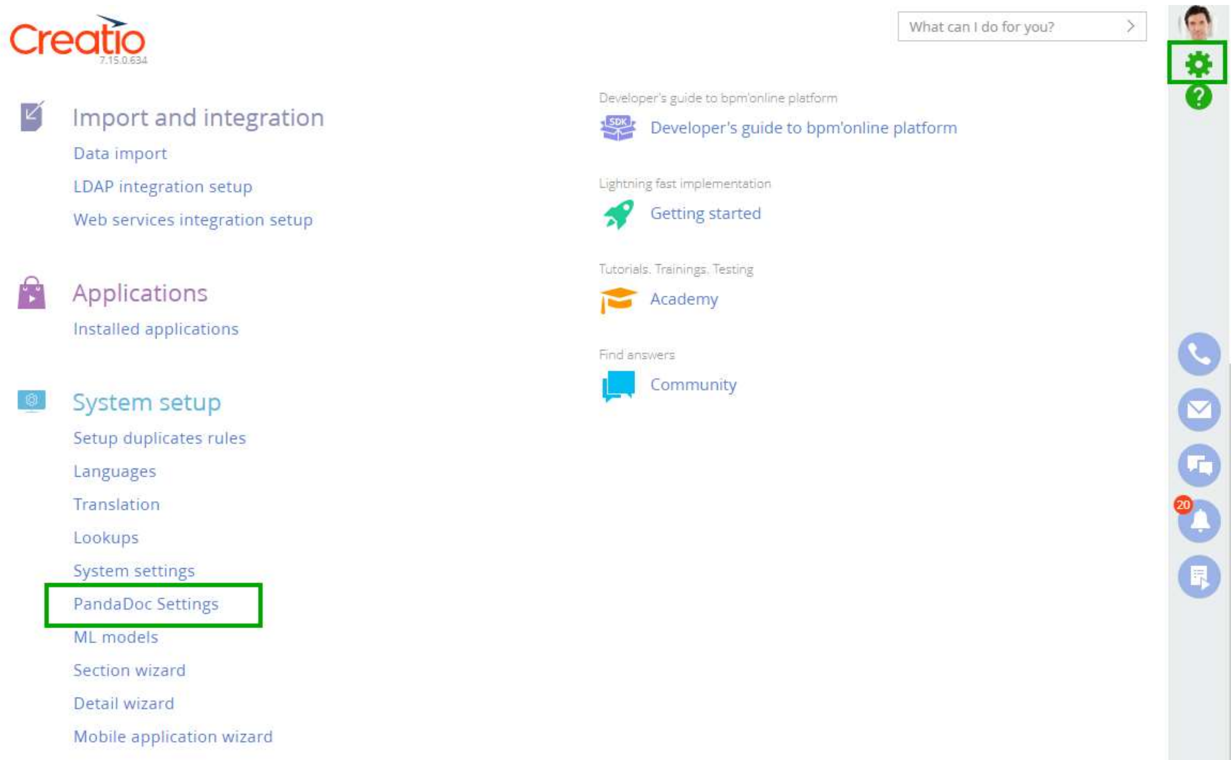
3) After that, any products attached to your Opportunity or Lead will be populated in the PandaDoc pricing list.

Configure PandaDoc Integration

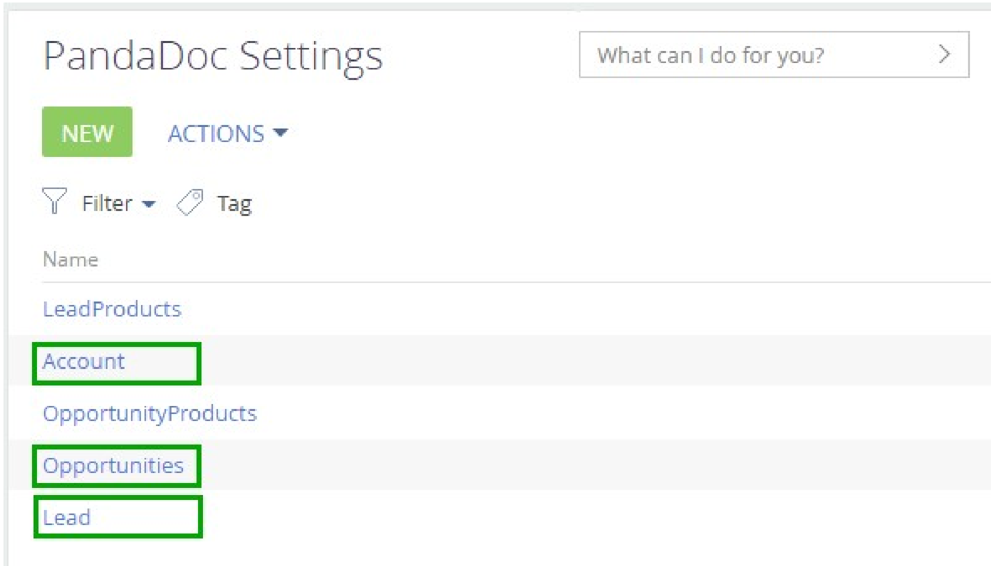
If you need more information to be populated in PandaDoc documents, you can configure these data points as follows.

1. How to access configuration

1) Log in as Creatio administrator.
2) Visit System Designer.
3) Go to System setup --> PandaDoc Settings.

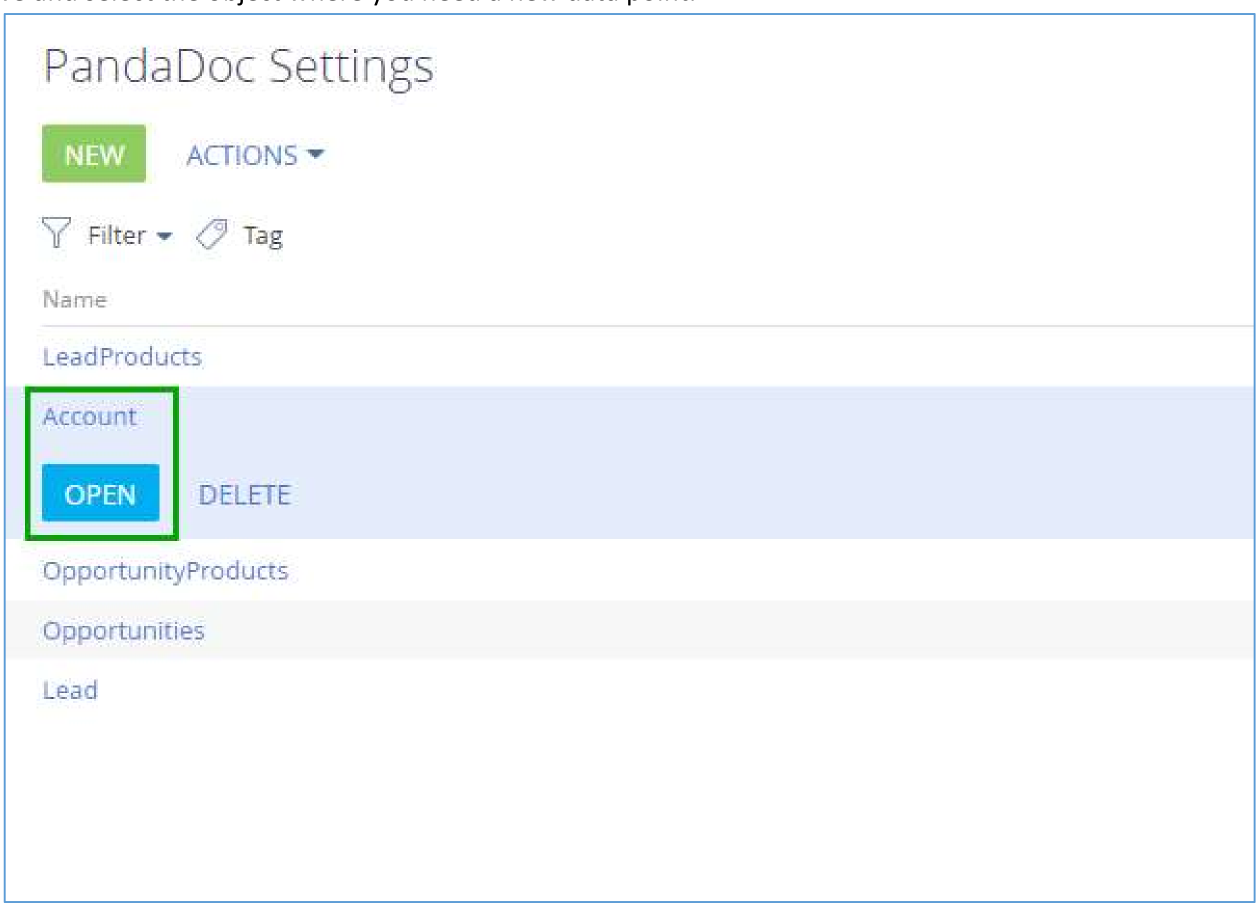


4) You can work with the following settings: Opportunities, Leads, Accounts. Each of these settings represents the list of Creatio fields that are populated in PandaDoc.

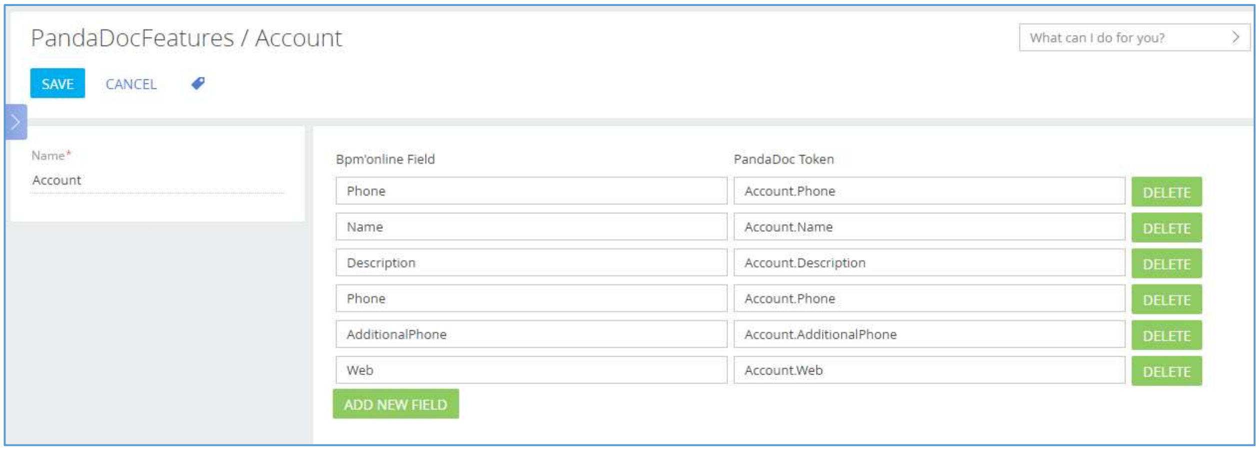


2. Add a new data point to be populated in PandaDoc

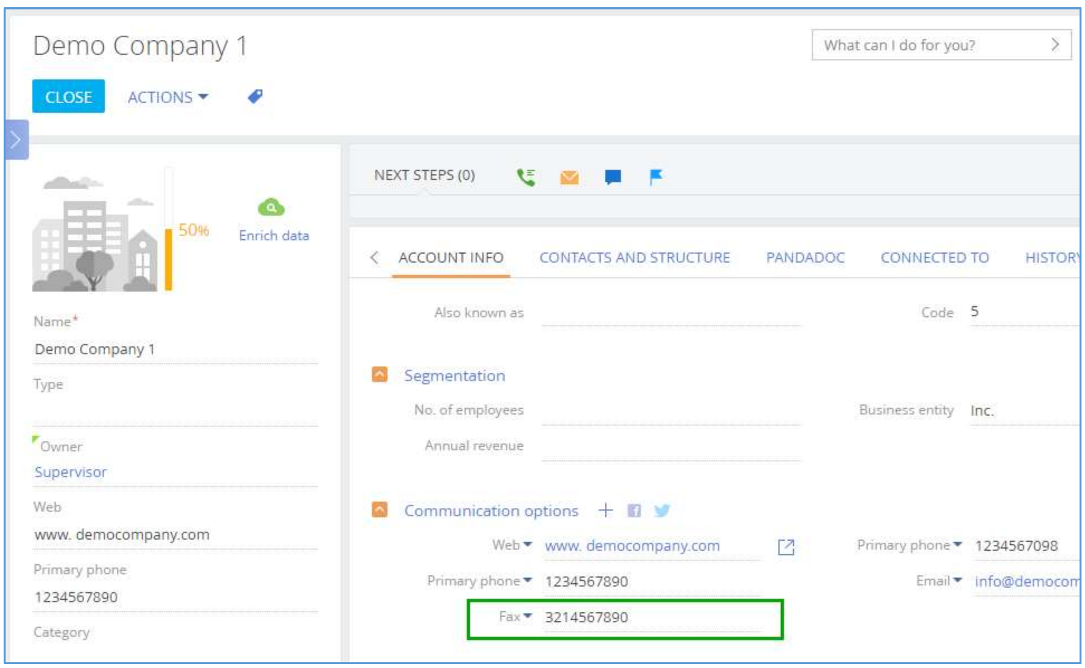
1) To add a new data point to be populated in PandaDoc, access the settings as described in (1.1) above and select the object where you need a new data point.



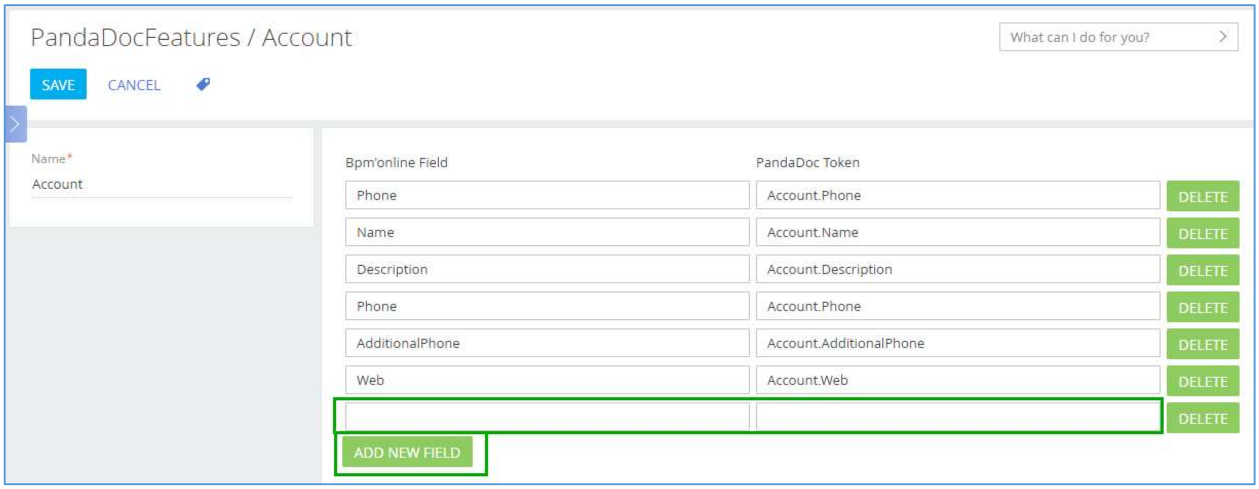
2) Creatio Field contains name of the database column that represents this entity. Normally, the database column has the same name as the title in the UI. PandaDoc token represents name of the token in PandaDoc.



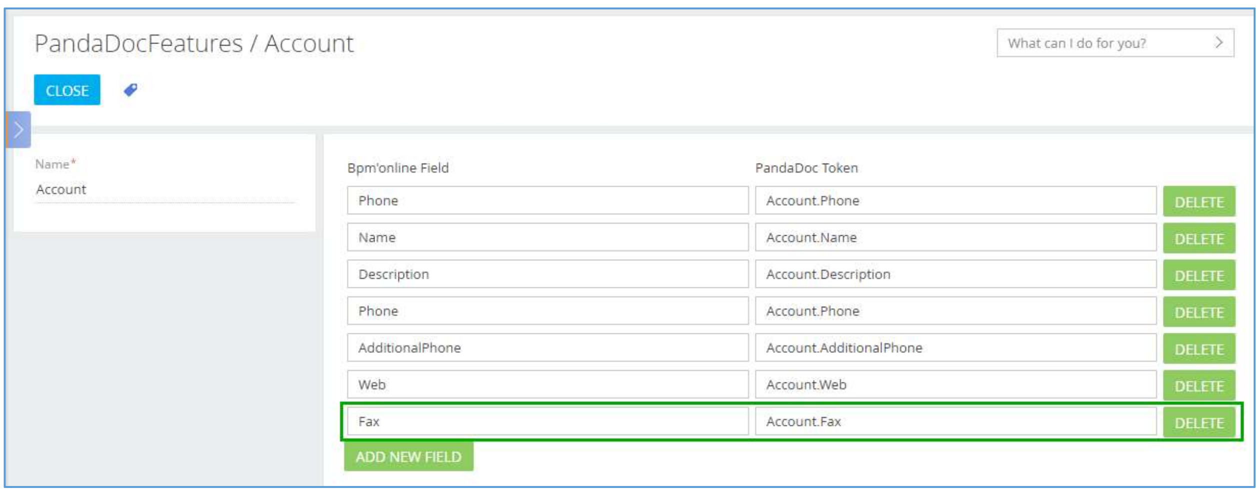
3) Let's say you need to add Fax to Account.



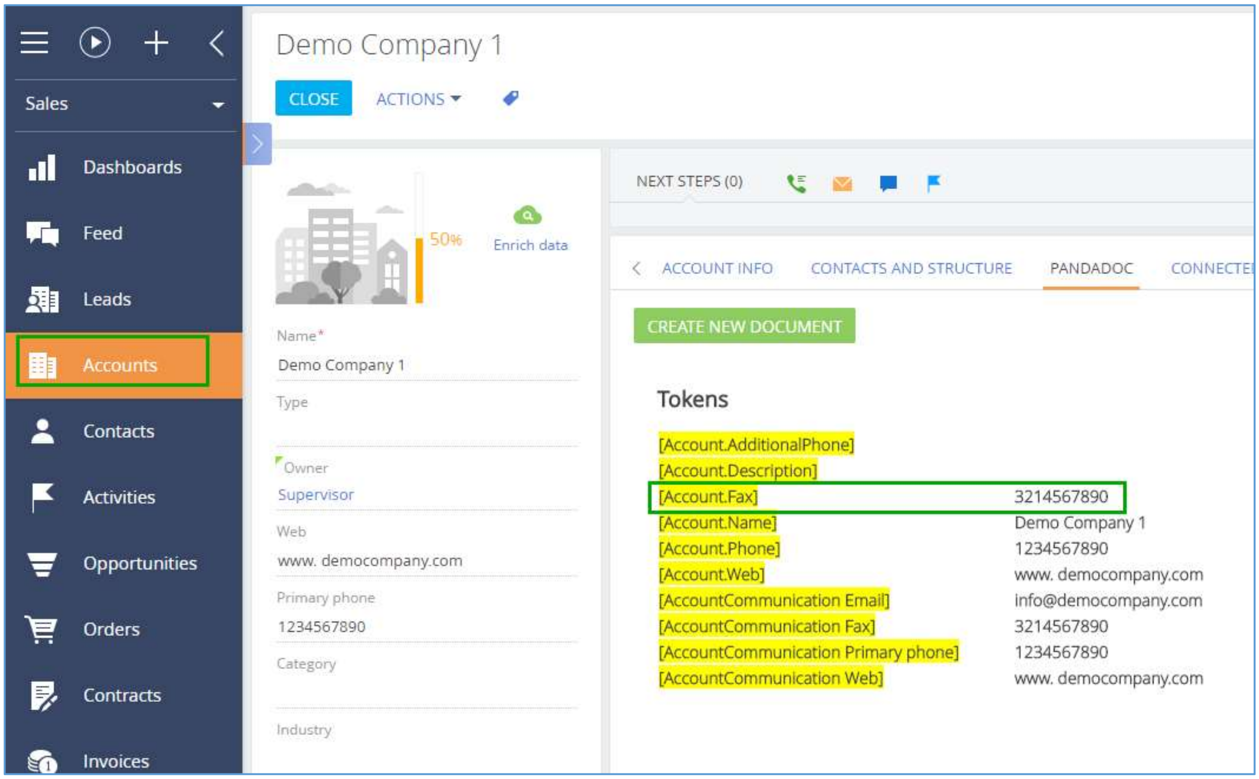
4) Click ADD NEW FIELD.



5) Enter name of Creatio database column Fax into Creatio Field and specify name of the token in PandaDoc Token.
Note1: We recommend that you always use name of the object in the token name, i.e. specify Account.Fax instead of just Fax. As account is related to Opportunity, this new token will also be available for Opportunity.
Note2: Do not use square brackets in token name. They will be added automatically.



6) As a result, you will have a new token in the list of tokens for Account and Opportunity.



Demo Company 1
CLOSE
ACTIONS
Sales
Dashboards
Feed
Leads
Accounts
Contacts
Activities
Opportunities
Orders
Contracts
Invoices
50%
Enrich data
Name*
Demo Company 1
Type
Owner
Supervisor
Web
www. democompany.com
Primary phone
1234567890
Category
Industry
NEXT STEPS (0)
ACCOUNT INFO
CONTACTS AND STRUCTURE
PANDADOC
CREATE NEW DOCUMENT
Tokens
[Account.AdditionalPhone]
[Account.Description]
[Account.Fax] 3214567890
[Account.Name] Demo Company 1
[Account.Phone] 1234567890
[Account.Web] www. democompany.com
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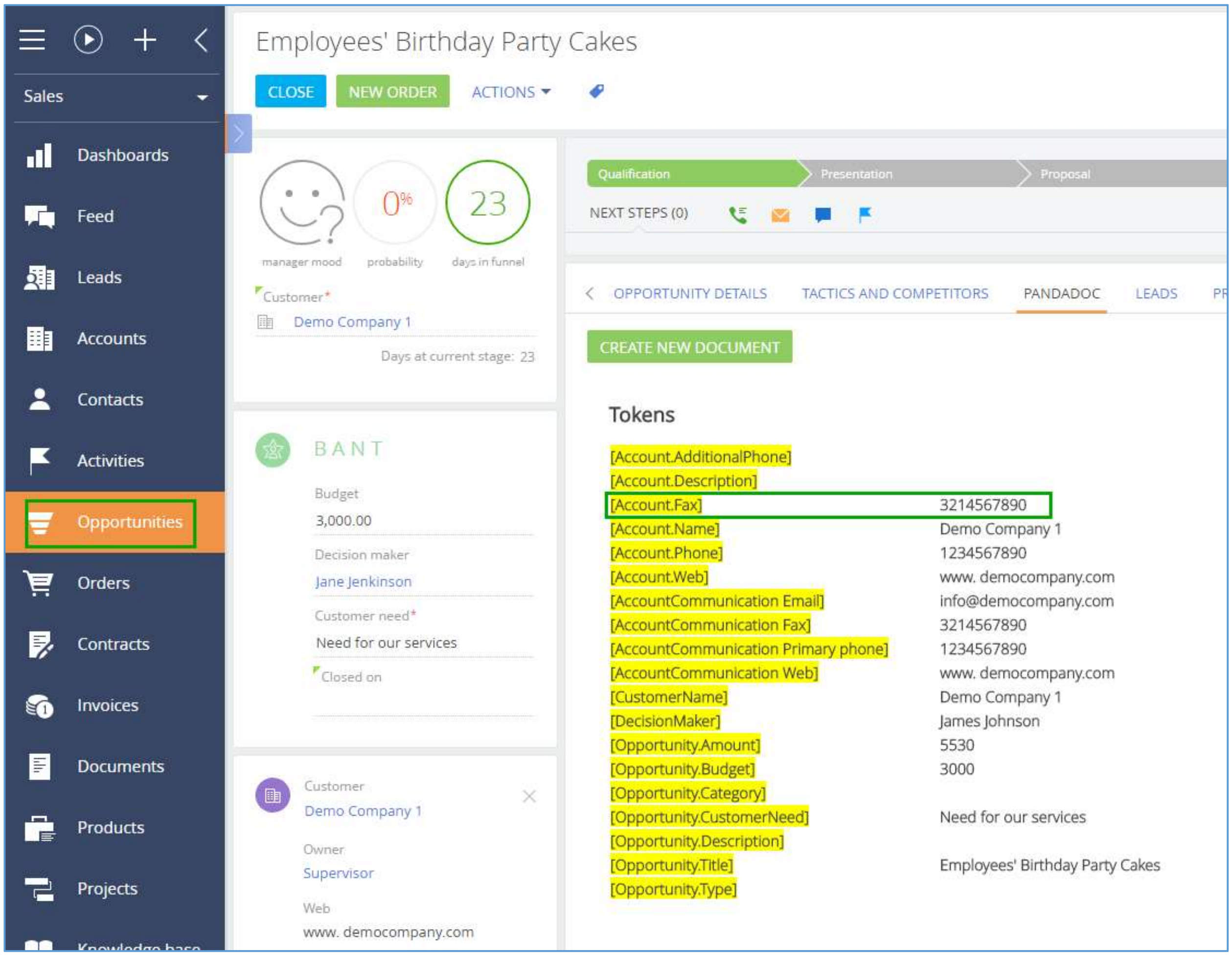
[AccountCommunication Web] www. democompany.com


Employees' Birthday Party Cakes
CLOSE
NEW ORDER
ACTIONS
Sales
Dashboards
Feed
Leads
Accounts
Contacts
Activities
Opportunities
Orders
Contracts
Invoices
Documents
Products
Projects
0%
23
manager mood
probability
days in funnel
Customer*
Demo Company 1
Days at current stage: 23
BANT
Budget
3,000.00
Decision maker
Jane Jenkinson
Customer need*
Need for our services
Closed on
Customer
Demo Company 1
Owner
Supervisor
Web
www. democompany.com
Qualification
Presentation
Proposal
NEXT STEPS (0)
OPPORTUNITY DETAILS
TACTICS AND COMPETITORS
PANDADOC
LEADS
CREATE NEW DOCUMENT
Tokens
[Account.AdditionalPhone]
[Account.Description]
[Account.Fax] 3214567890
[Account.Name] Demo Company 1
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