

## 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](mailto:creatio-pandadoc@velvetech.com)

Phone: 847.559.0864

##### Versions of Creatio that support this Integration

Bpm'online 7.10 and up

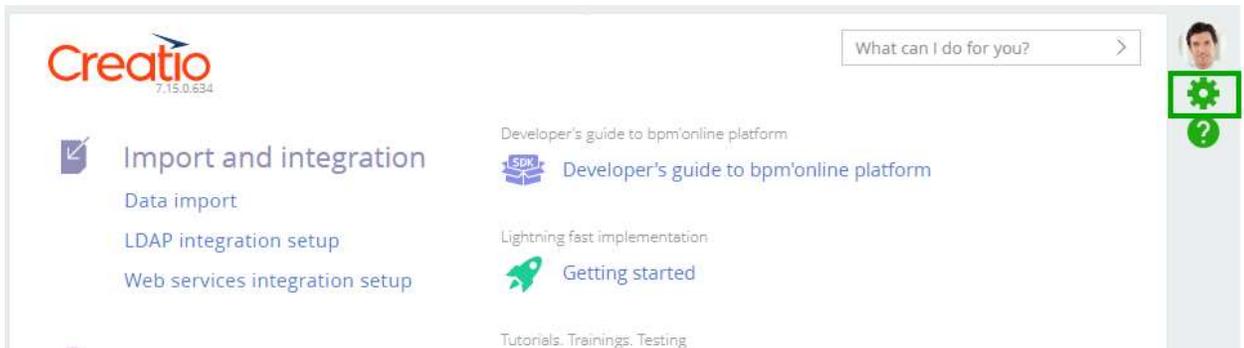
Creatio 7.15 and up

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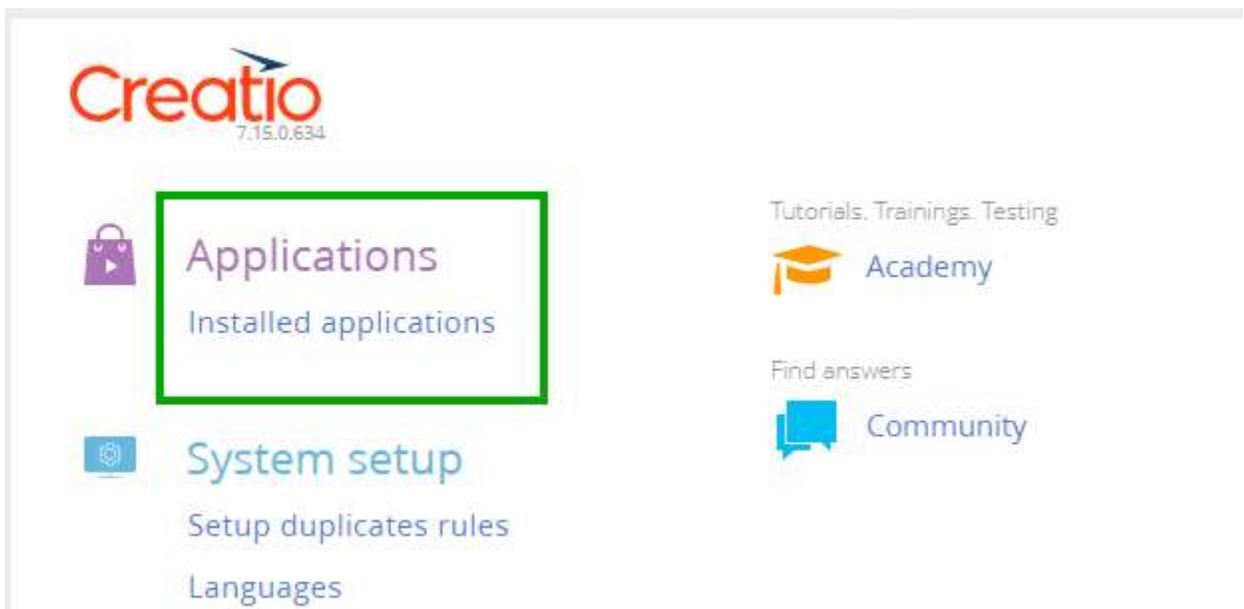
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## Enable PandaDoc Integration

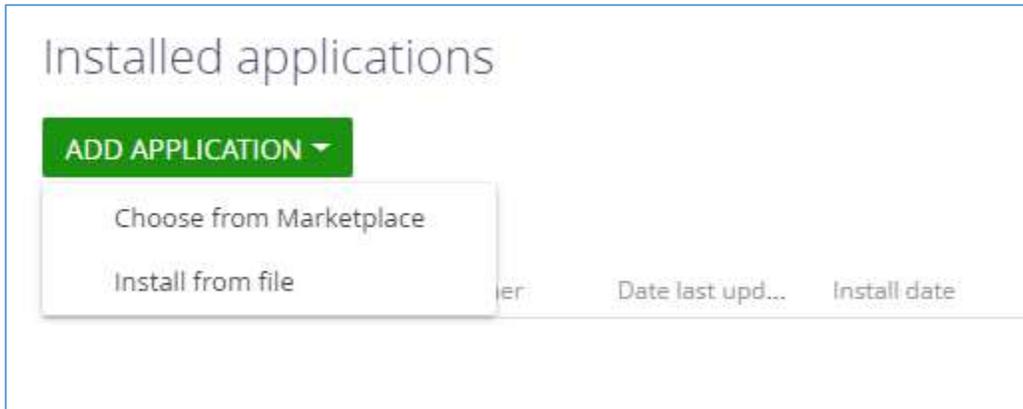
1. To enable integration with PandaDoc, contact Velvetech to receive the installation package for Creatio and contact Creatio to purchase licenses or receive trial licenses for the connector.  
Email: [creatio-pandadoc@velvetech.com](mailto:creatio-pandadoc@velvetech.com)  
Phone: 847.559.0864
2. Log in Creatio as system administrator and visit System Designer page.



3. Navigate to Applications --> Installed applications.



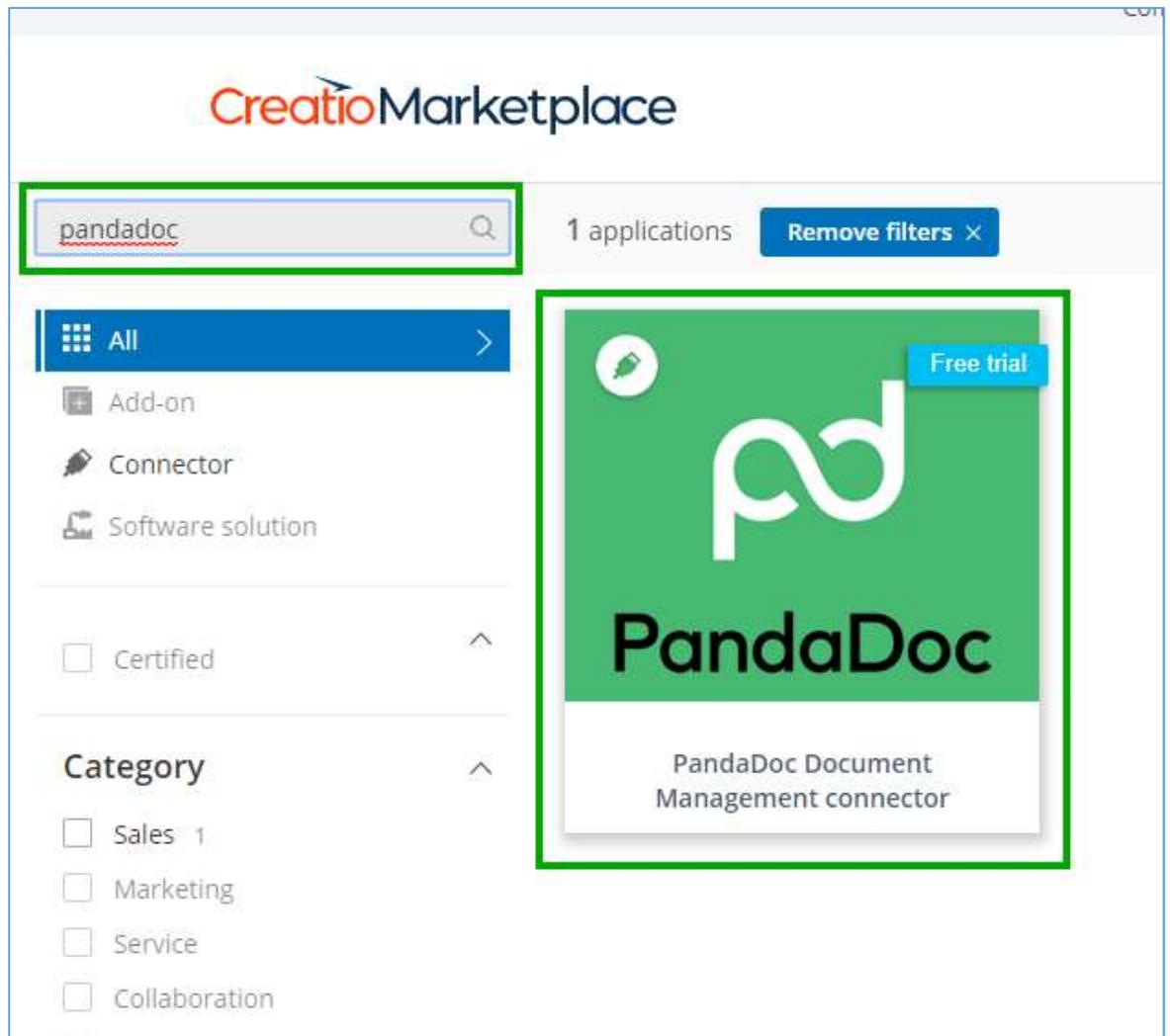
4. Click ADD APPLICATION.



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.

PandaDoc  
Document  
Management for  
Creatio

Close more deals with better quotes, proposals, and contract management all within the PandaDoc integration module for Creatio

Product description Price and support

Install

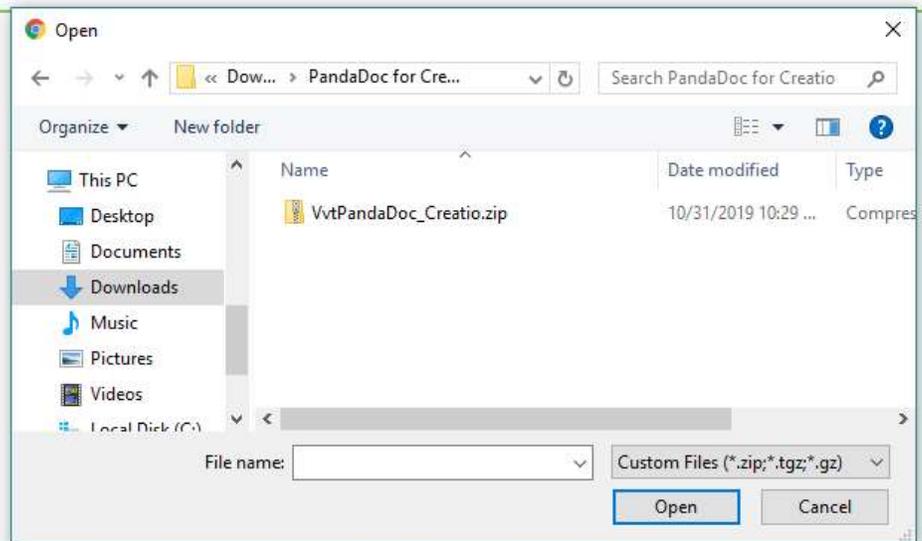
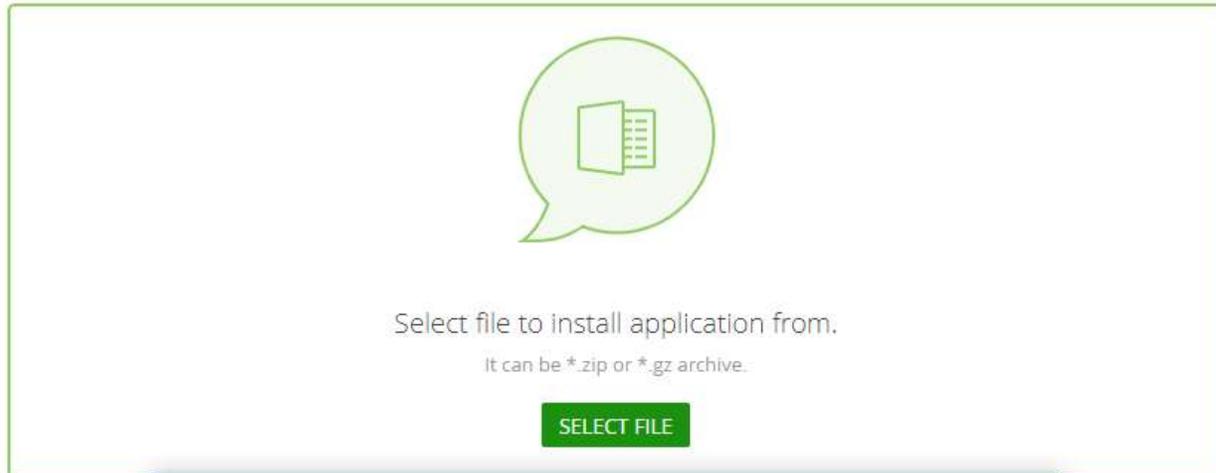
You will be asked to log in Creatio Marketplace and select the Creatio instance you are using. As soon as you do, the installation will start.

b. Install from file.

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

## Application installation

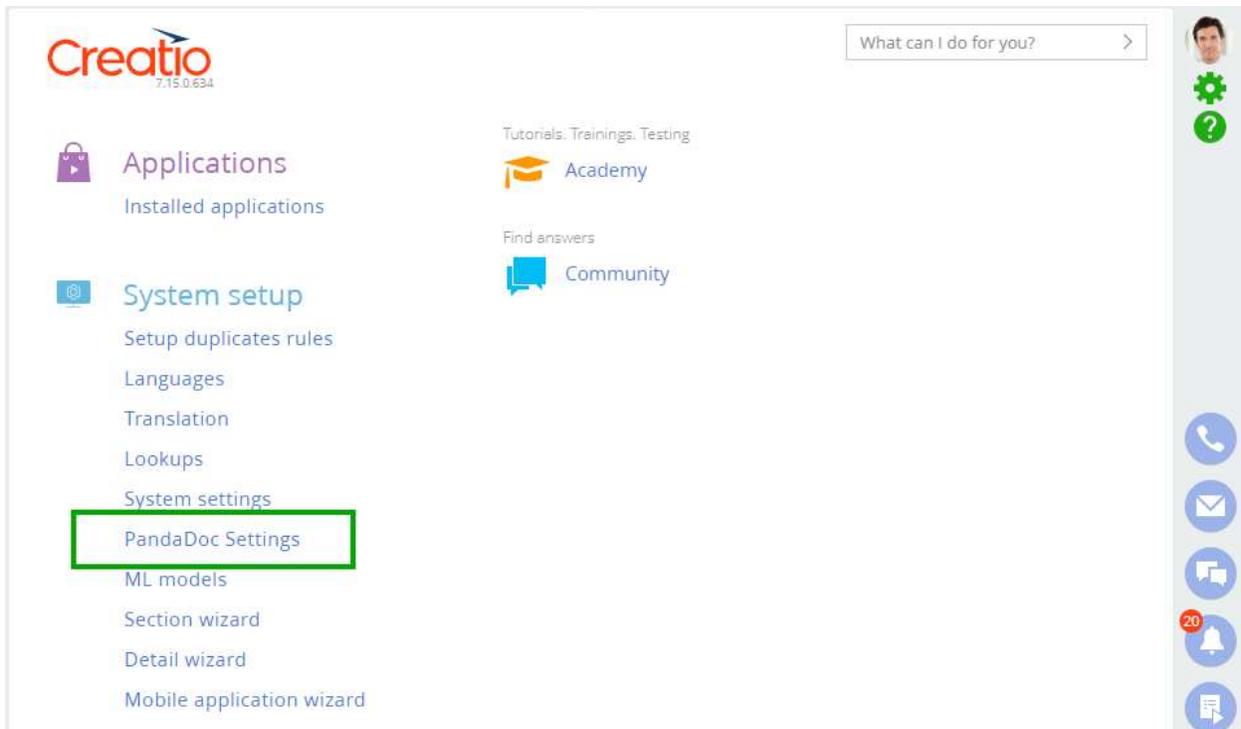
CLOSE



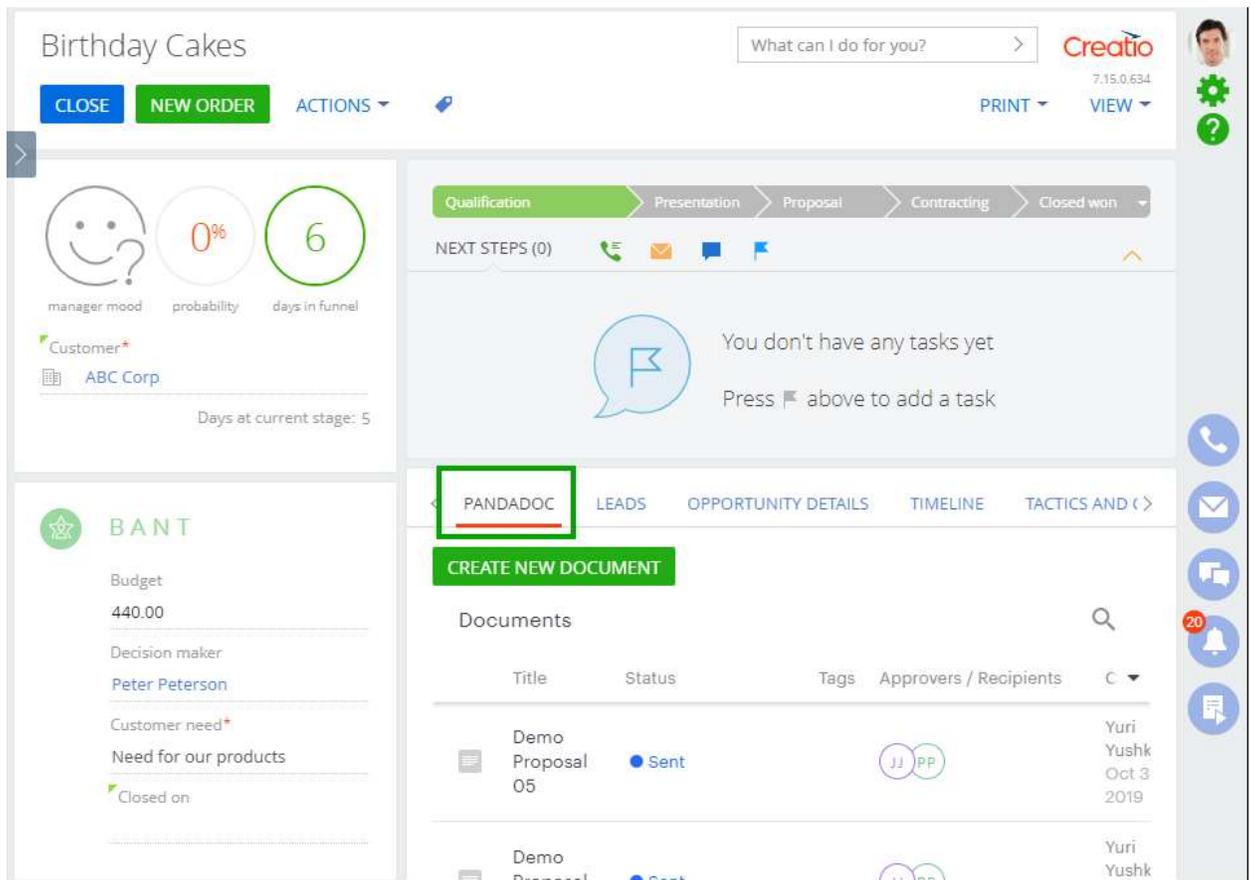
5. Assign connector licenses to users.  
Access System Designer --> System Users

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

- 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.

The screenshot displays the Creatio CRM interface for a lead named 'BANT'. The top navigation bar includes a search box with the text 'What can I do for you?', the Creatio logo, and version number '7.15.0.634'. Below the search bar are buttons for 'CLOSE', 'NEW ORDER', 'ACTIONS', 'PRINT', and 'VIEW'. The main content area is divided into several sections:

- Lead Summary:** Includes a 'manager mood' icon, a 'probability' gauge at 0%, and a 'days in funnel' gauge at 6. Below this is the customer name 'ABC Corp' and 'Days at current stage: 5'.
- Process Flow:** A horizontal bar shows stages: Qualification (active), Presentation, Proposal, Contracting, and Closed won.
- Next Steps:** A section titled 'NEXT STEPS (0)' with a message: 'You don't have any tasks yet. Press [flag icon] above to add a task'.
- Lead Details:** A section for 'BANT' with fields for Budget (440.00), Decision maker (Peter Peterson), Customer need (Need for our products), and Closed on.
- Customer Profile:** A sidebar showing 'Customer ABC Corp', Owner 'Maria Gorokhova', and Web 'https://abccorp.com'.
- Navigation:** A horizontal menu with tabs: PANDADOC (selected), LEADS, OPPORTUNITY DETAILS, TIMELINE, and TACTICS AND (>).
- Action:** A prominent green button labeled 'CREATE NEW DOCUMENT'.
- Integration Prompt:** A message 'Please connect your PandaDoc account' with a green 'Connect' button highlighted by a red box.

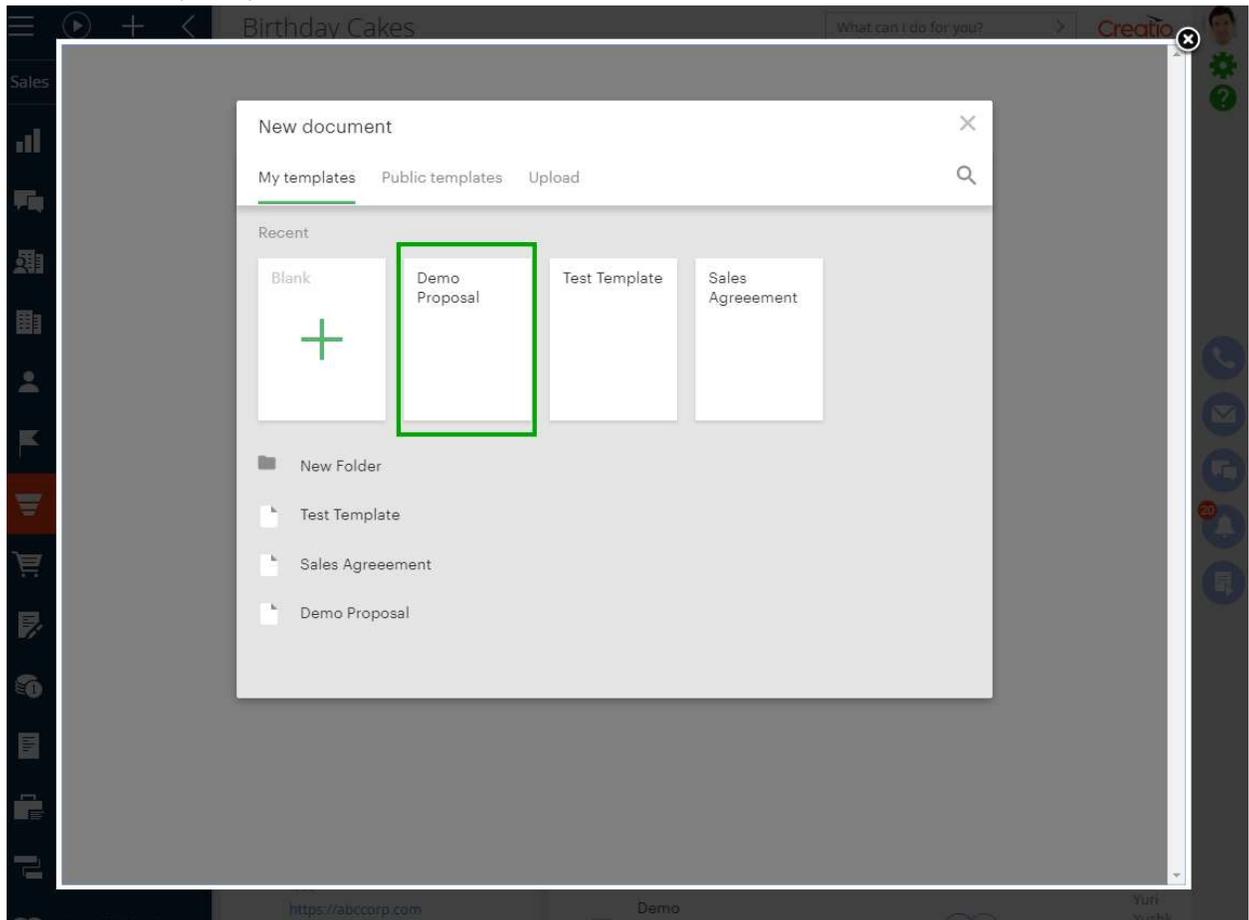
PandaDoc login page will open in a new tab. Log in and refresh the Creatio page.

## 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.

The screenshot displays the PandaDoc interface for an opportunity record titled "Birthday Cakes". The interface is divided into several sections:

- Header:** Includes the opportunity name "Birthday Cakes", a search bar "What can I do for you?", the "Creatio" logo, and the user's name and profile picture.
- Navigation:** A horizontal bar with tabs: "PANDADOC" (highlighted with a red box), "LEADS", "OPPORTUNITY DETAILS", "TIMELINE", and "TACTICS AND (>)".
- Left Sidebar:** Contains a "manager mood" icon, a "probability" gauge showing "0%", and a "days in funnel" gauge showing "6". Below this is the "Customer" information: "ABC Corp" and "Days at current stage: 5".
- Right Sidebar:** Contains a "BANT" section with fields for "Budget" (440.00), "Decision maker" (Peter Peterson), "Customer need" (Need for our products), and "Closed on".
- Main Content Area:** Features a "CREATE NEW DOCUMENT" button and a "Documents" table. The table has columns for "Title", "Status", "Tags", and "Approvers / Recipients". Two documents are listed:

Title	Status	Tags	Approvers / Recipients
Demo Proposal 05	Sent	JJ PP	Yuri Yushk Oct 3 2019
Demo Proposal	Sent	JJ PP	Yuri Yushk

- b) Click VIEW TOKENS button.

< OPPORTUNITY DETAILS TACTICS AND COMPETITORS **PANDADOC** LEADS PRODUCTS

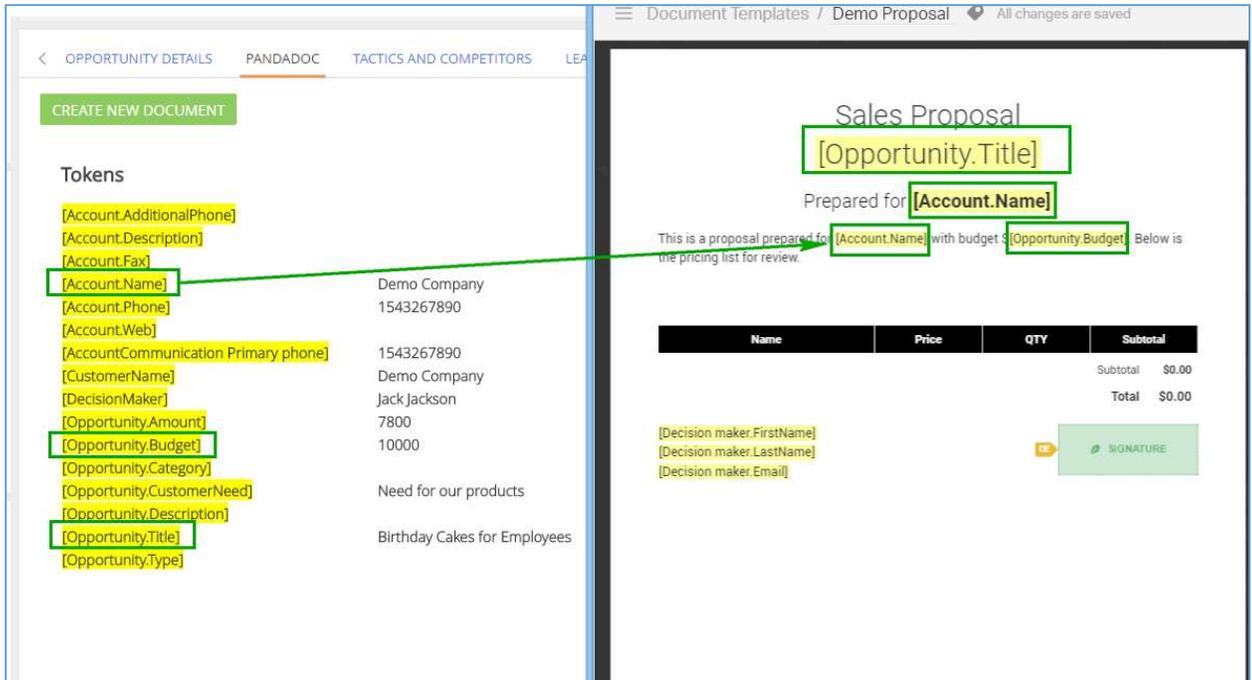
**CREATE NEW DOCUMENT**

Documents

Title	Status	Tags
 Demo Template 1	 Draft	
 New template	 Draft	
 Demo Template 1	 Draft	
 Demo Doc 1.2	 Draft	
 Demo Doc 1.1	 Draft	

**VIEW TOKENS**

- 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.

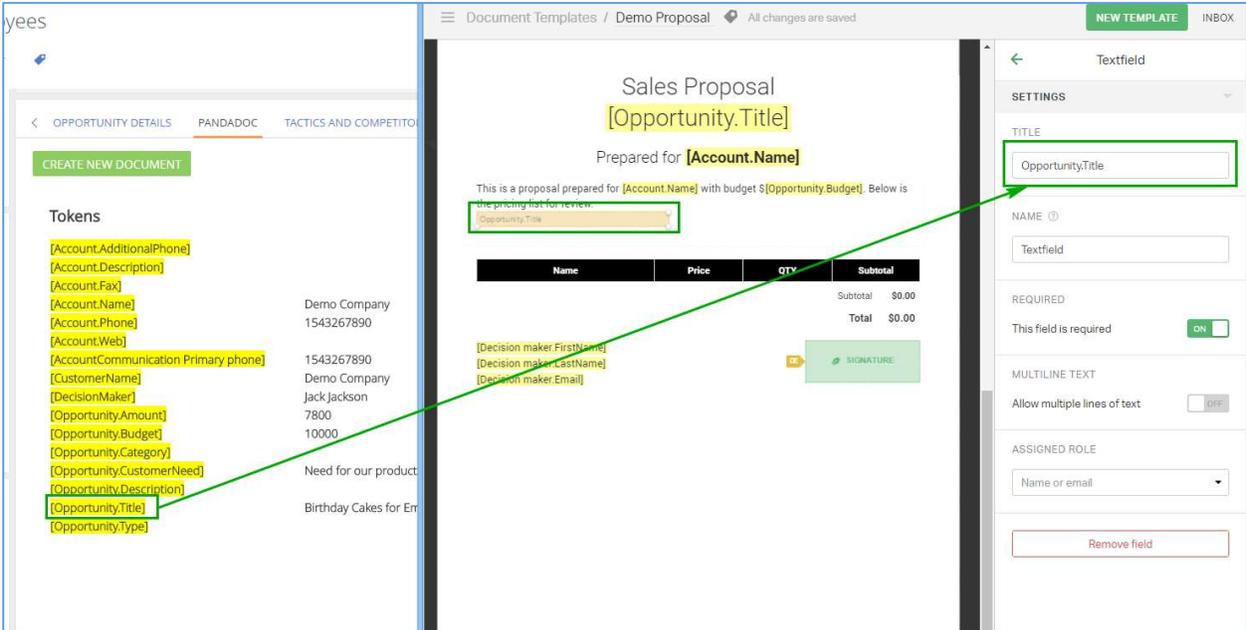
List of tokens you can use

Creatio Record Type	Token to Use in PandaDoc
<b>Lead</b>	[Lead.Account] [Lead.Contact] [Lead.Country] [Lead.Email] [Lead.JobTitle] [Lead.MobilePhone] [Lead.Name] [Lead.Website]
<b>Account</b>  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]

<p>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.</p>	<p>[AccountCommunication Primary phone]</p>
<p><b>Opportunity</b></p> <p>Note: all tokens available for the account related to the opportunity are also available for this opportunity.</p>	<p>[CustomerName]  [DecisionMaker]  [Opportunity.Amount]  [Opportunity.Budget]  [Opportunity.Category]  [Opportunity.CustomerNeed]  [Opportunity.Description]  [Opportunity.Title]  [Opportunity.Type]</p>
<p><b>Custom fields</b></p>	<p>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.</p>

### 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.

The screenshot shows the 'OPPORTUNITY DETAILS' tab in Creatio. The opportunity name is 'Employees' Birthday Party Cakes'. The owner is 'Supervisor'. The contact roles are listed in a table below:

Contact	Prim...	Role	Influence	Decision-mak...	Loyalty
James Johnson	No	Influencer	High		1 - Interested
Jane Jenkinson	No	Decision maker	Medium		2 - Supportive

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

# Sales Proposal

## [OpportunityTitle]

Prepared for [CustomerName]

This is a proposal for [CustomerNeed] prepared for [CustomerName]. Below is the pricing list for review.

Name	Price	QTY	Subtotal
			Subtotal \$0.00
			<b>Total \$0.00</b>

[Decision maker.FirstName]  
 [Decision maker.LastName]  
 [Decision maker.Email]

[Influencer.FirstName]  
 [Influencer.LastName]  
 [Influencer.Email]

DE → SIGNATURE

IN → SIGNATURE

**Roles** Signing Order

You can add roles to this template and assign fields to each role [?](#)

Add

DE Decision maker Signer >

IN Influencer Signer >

**SIGNING & FORWARDING**

Document forwarding  OFF  
 Allows forwarding this document to another person. They will be added as a CC

Signature forwarding  OFF  
 Allows signer to forward this document for signature to another person

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

DOCUMENTS LIST

New document: Demo Proposal ✕

Assign people to roles

<b>DE</b>	Decision maker	<b>WW</b>	William Williams wwilliams@test.com	<span>✕</span>
<b>IN</b>	Influencer	<b>JJ</b>	Jack Jackson jjackson@test.com	<span>✕</span>

Add more recipients

[Back to templates](#)

[Start editing](#)

VIEW TOKENS

[OPPORTUNITY DETAILS](#)
[PANDADOC](#)
[TACTICS AND COMPETITORS](#)
[LEADS](#)
[PRODUCTS](#)
[OPPORTUNITY HIST](#)

**DOCUMENTS LIST**

Documents / Demo Proposal ● Draft 🔒 All changes are saved

Name	Price	QTY	Subtotal
Epic ice cream cake	\$80.00	10	\$800.00
Print Lime & coconut roulade	\$50.00	20	\$1,000.00
Hazelnut honey cake	\$50.00	100	\$5,000.00
Maple crepe cake with caramelised pancetta	\$100.00	10	\$1,000.00
Subtotal			\$7,800.00
<b>Total</b>			<b>\$7,800.00</b>

William  
 Williams  
 wwilliams@test.com

WIN SIGNATURE

[VIEW TOKENS](#)

Blocks Fields

H  
 HEADING

▶  
 VIDEO

☰  
 TOC

📄  
 PAGE HEADER

💳  
 PAYMENT

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.

The screenshot shows a CRM interface with a progress bar at the top (Qualification, Presentation, Proposal, Contracting, Closed won) and a 'NEXT STEPS (0)' section. The 'PRODUCTS' tab is highlighted with a green box. Below the tabs, there is a section for 'Products' with a table:

Product	Quantity	Interest
Brownie	50.00	
German Marble Cake	100.00	
Mini Cheesecake	10.00	

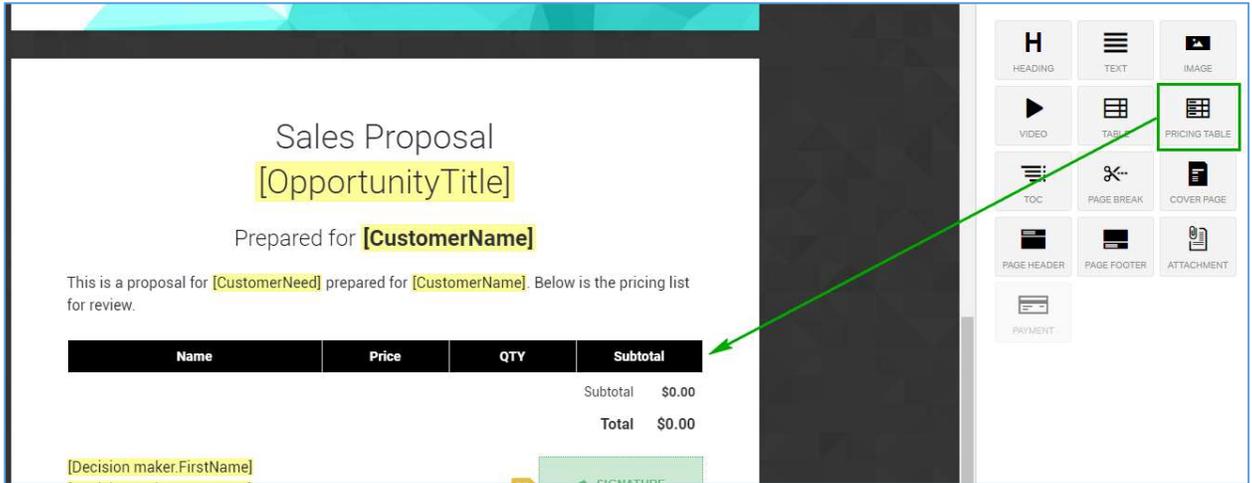
Leads – products attached under CUSTOMER NEED DETAILS tab --> Products. You will need to enter Quantity and Price in PandaDoc manually.

The screenshot shows a CRM interface with tabs: LEAD INFO, CUSTOMER NEED DETAILS (highlighted with a green box), PANDADOC, HISTORY, ATTACHMENTS AND NOTES, and FEED. Below the tabs, there is a section for 'Need maturity' with a value of 'Discovered'. Below that, there is a section for 'Features' with 'No data'. Below that, there is a section for 'Products' (highlighted with a green box) with a list of products:

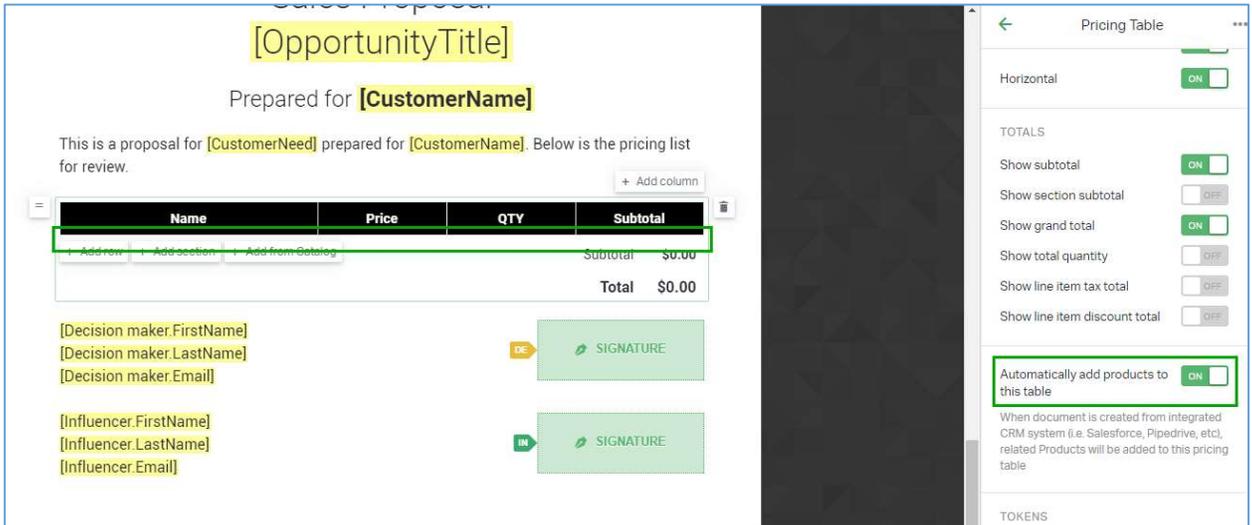
- Brownie
- German Marble Cake
- Mini Cheesecake

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.



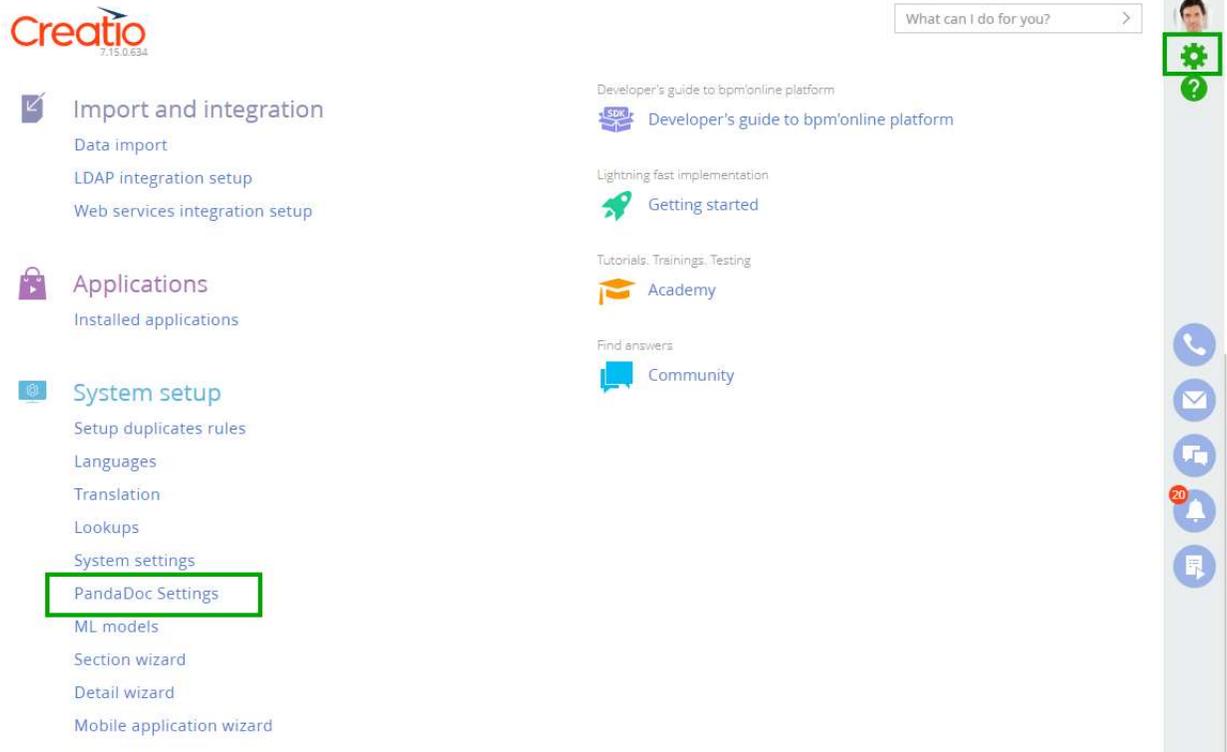
- 3) After that, any products attached to your Opportunity or Lead will be populated in the PandaDoc pricing list.

## Configure PandaDoc Integration

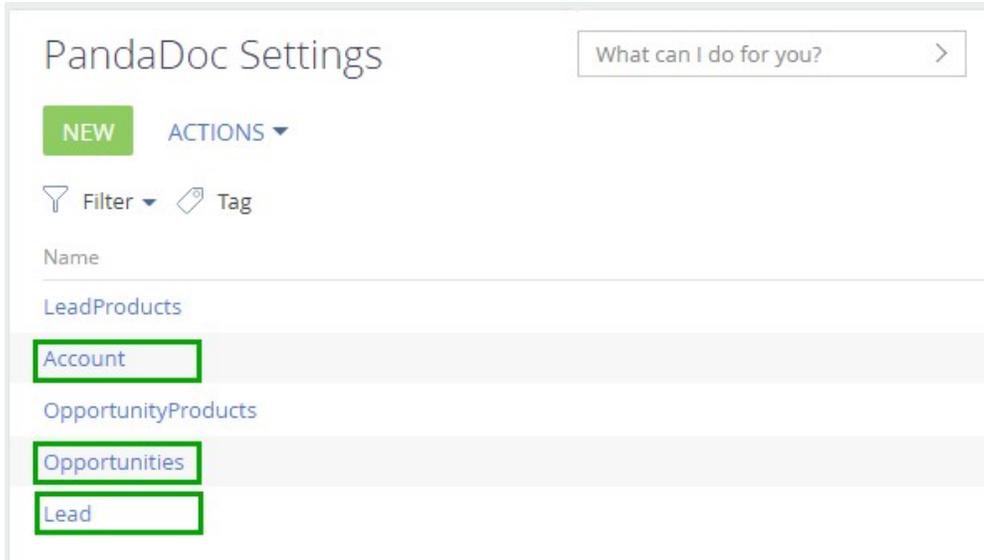
If you need more information to be populated in PandaDoc documents, you can configure these data points as follows.

### 1. How to access configuration

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

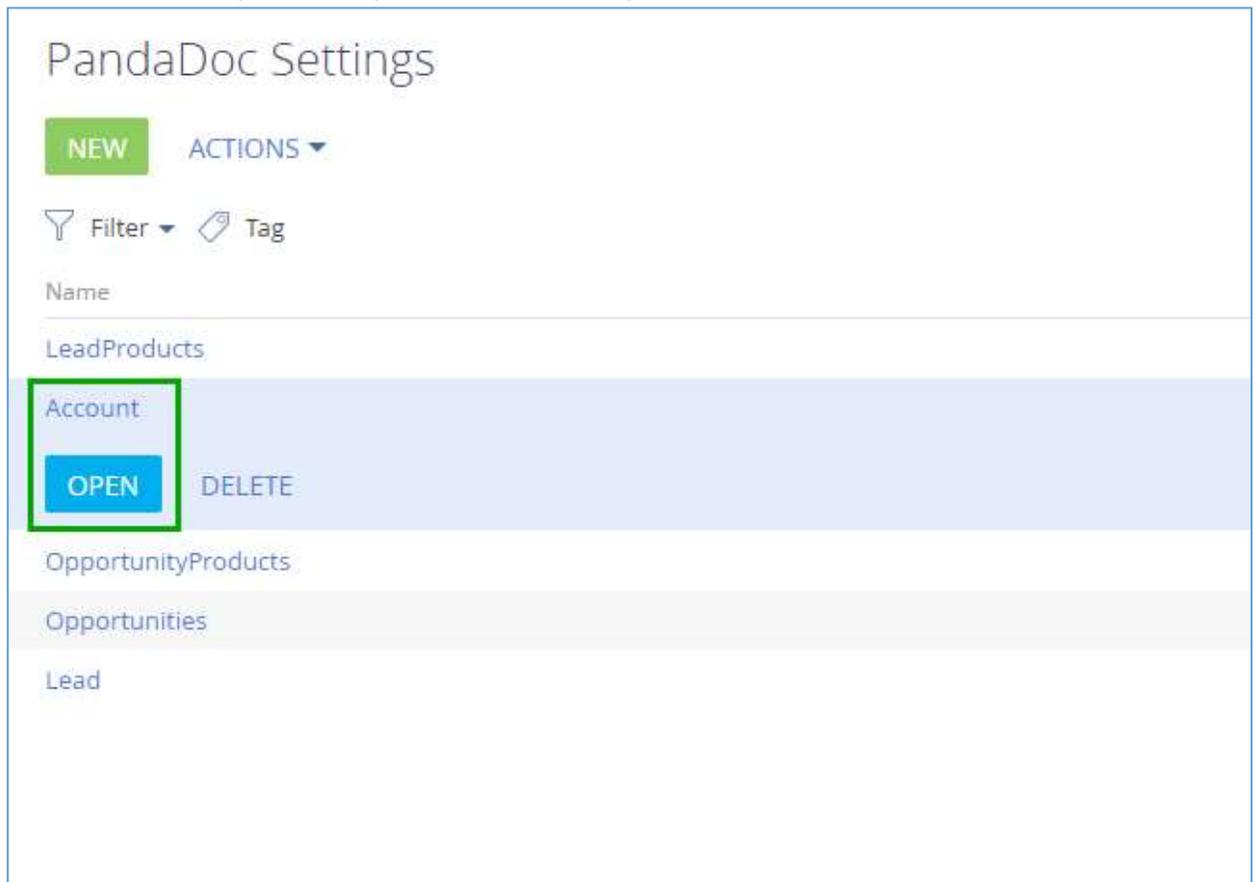


- 4) You can work with the following settings: Opportunities, Leads, Accounts. Each of these settings represents the list of Creatio fields that are populated in PandaDoc.



## 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.

Bpm'online Field	PandaDoc Token	
Phone	Account.Phone	DELETE
Name	Account.Name	DELETE
Description	Account.Description	DELETE
Phone	Account.Phone	DELETE
AdditionalPhone	Account.AdditionalPhone	DELETE
Web	Account.Web	DELETE

ADD NEW FIELD

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

Communication options + f t

Web www.democompany.com

Primary phone 1234567890

Fax 3214567890

- 4) Click ADD NEW FIELD.

PandaDocFeatures / Account What can I do for you? >

**SAVE** CANCEL 

Name\*  
Account

Bpm'online Field	PandaDoc Token	
Phone	Account.Phone	<b>DELETE</b>
Name	Account.Name	<b>DELETE</b>
Description	Account.Description	<b>DELETE</b>
Phone	Account.Phone	<b>DELETE</b>
AdditionalPhone	Account.AdditionalPhone	<b>DELETE</b>
Web	Account.Web	<b>DELETE</b>
		<b>DELETE</b>

**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.

PandaDocFeatures / Account What can I do for you? >

**CLOSE** 

Name\*  
Account

Bpm'online Field	PandaDoc Token	
Phone	Account.Phone	<b>DELETE</b>
Name	Account.Name	<b>DELETE</b>
Description	Account.Description	<b>DELETE</b>
Phone	Account.Phone	<b>DELETE</b>
AdditionalPhone	Account.AdditionalPhone	<b>DELETE</b>
Web	Account.Web	<b>DELETE</b>
Fax	Account.Fax	<b>DELETE</b>

**ADD NEW FIELD**

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

☰ ▶ + <

Sales ▾

📊 Dashboards

💬 Feed

📄 Leads

📁 Accounts

👤 Contacts

🚩 Activities

📈 Opportunities

🛒 Orders

📄 Contracts

📄 Invoices

## Demo Company 1

CLOSE ACTIONS ▾

50%

Enrich data

Name\*

Type

Owner

Web

Primary phone

Category

Industry

NEXT STEPS (0)

< ACCOUNT INFO CONTACTS AND STRUCTURE PANDADOC CONNECTE

CREATE NEW DOCUMENT

### Tokens

[Account.AdditionalPhone]	
[Account.Description]	
[Account.Fax]	3214567890
[Account.Name]	Demo Company 1
[Account.Phone]	1234567890
[Account.Web]	www. democompany.com
[Account.Communication Email]	info@democompany.com
[Account.Communication Fax]	3214567890
[Account.Communication Primary phone]	1234567890
[Account.Communication Web]	www. democompany.com

Employees' Birthday Party Cakes

CLOSE NEW ORDER ACTIONS

manager mood

0%

probability

23

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
[Account.Phone]	1234567890
[Account.Web]	www.democompany.com
[AccountCommunication Email]	info@democompany.com
[AccountCommunication Fax]	3214567890
[AccountCommunication Primary phone]	1234567890
[AccountCommunication Web]	www.democompany.com
[CustomerName]	Demo Company 1
[DecisionMaker]	James Johnson
[Opportunity.Amount]	5530
[Opportunity.Budget]	3000
[Opportunity.Category]	
[Opportunity.CustomerNeed]	Need for our services
[Opportunity.Description]	
[Opportunity.Title]	Employees' Birthday Party Cakes
[Opportunity.Type]	