

Installing Adobe Sign Connector for Creatio

1. Login to Adobe Sign: <https://secure.echosign.com/public/login>
2. Go to [Account] (Tab) > [Adobe Sign API] (On left menu) > [API Applications] > Add (+ Button)
3. Name: Creatio Display: Creatio
Domain: CUSTOMER

Create ✕

Provide a name for your application to issue a set of credentials for use with Adobe Sign's API

Name:

Creatio

Display Name:

Creatio

Domain:

☒ CUSTOMER (This application will only have access to data within your account)

☐ PARTNER (This application will have access to any authorised Adobe Sign account)

Cancel Save

4. Click Save
5. Select the new API Application > click [Configure OAuth for Application]
6. Take a copy of Client ID and Client Secret.
7. In the redirect URL, enter your Creatio URL. [https://\[site domain\].creatio.com/0/Nui/ViewModule.aspx](https://[site domain].creatio.com/0/Nui/ViewModule.aspx)
8. Enable all the scopes and set the modifier to “account”

Configure OAuth

Client ID:

Client Secret:

Note: You must keep your Client Secret confidential.

Redirect URI:

https://domain.creatio.com/0/Nui/ViewModule.aspx

Note: The redirectUri specified in your OAuth requests must belong to this list of uris. You can mention multiple uris as comma separated list.

Enabled Scopes

You must enable the scopes that you intend to request through the OAuth protocol. Please limit the scopes that you enable to the minimum set necessary for your application, which is one of the requirements for Certification.

Please contact support if you need to change which scopes are enabled for your application.

Note that only Group Admins can approve OAuth requests that use the "group" scope modifier, and only Account Admins can approve OAuth requests that use the "account" scope modifier.

Enabled?	Scope	Modifier	Description
<input checked="" type="checkbox"/>	user_read	account	View users In your account
<input checked="" type="checkbox"/>	user_write	account	Create or manage users within your account
<input checked="" type="checkbox"/>	user_login	account	Login on behalf of any user In your account
<input checked="" type="checkbox"/>	agreement_read	account	Access documents & data on behalf of any user in your account
<input checked="" type="checkbox"/>	agreement_write	account	Manage the status of documents on behalf of any user In your account
<input checked="" type="checkbox"/>	agreement_send	account	Send documents on behalf of any user In your account
<input checked="" type="checkbox"/>	widget_read	account	View widgets on behalf of any user In your account
<input checked="" type="checkbox"/>	widget_write	account	Create, edit or publish widgets on behalf of any user In your account
<input checked="" type="checkbox"/>	library_read	account	View templates and document library on behalf of any user In your account
<input checked="" type="checkbox"/>	library_write	account	Manage the templates and document library on behalf of any user In your account
<input checked="" type="checkbox"/>	workflow_read	account	View workflows on behalf of any user In your account
<input checked="" type="checkbox"/>	workflow_write	account	Create workflows on behalf of any user In your account

Cancel

Save

- From your browser address bar, copy the region (subdomain) of your adobe sign account. This subdomain is found between "Secure" and "Echosign.com" in the address

For example, if the Address is:

https://secure.na1.echosign.com/account/accountSettingsPage#pagelid::API_APPLICATIONS

The region is na1

Creatio Side

- Install the AdobeSign App from the Creatio Marketplace
<https://academy.creatio.com/documents/studio/7-11/installing-applicationsmarketplace>
- Once Installed, Go to Creatio [System Settings] and search for "Sign Client id". In the default value, enter the Client Id you copied in step 6.
- Go back to system settings, search for "Sign Secret". In the default value, enter the client secret you copied in step 6.
- Go back to system settings, search for "Sign Authentication URL". Use the region value you obtained in step 9 to fill in the default value. So if the region is "na1", then the default value should be: <https://secure.na1.echosign.com/public/oauth>
- [Empty browser cache and hard reload.](#)
- Go to [System Designer] > in the [Import and Integration] area, click [Authenticate Adobe Sign]

16. Enter your Adobe Sign Username and password. Sign In.
17. You should now be redirected back to Creatio. If successful, you should receive a success notification.

Adobe Sign Authentication Result

CLOSE

Result

Success!

Auth Code

Redirect URI

18. Go to [System Designer] > [Workplace setup] > Select the desired workplace > and select the Agreements section.

Select: Section

SELECT

CANCEL

ACTIONS ▾

Records selected: 1

VIEW ▾

Title ▾

SEARCH

Title ▴

☐

Agent desktop

☒

Agreements

☐

Calls

☐

Campaign log

☐

Campaigns

☐

Cases

☐

Changes

☐

Configuration items

☐

Duplicates rules

☐

Email

☐

Email templates

☐

Employee

19. Log out of Creatio and Back in.