Autenti Connector for Creatio

User guide

v. 1.0

1. CONTENTS

1. REVISION HISTORY

Version	Date	Comments
1.0	16 Dec 2025	Initial version.

2. INTRODUCTION

2.1 OVERVIEW

Welcome to the Autenti Connector for Creatio user guide. It's for Creatio administrators and business users, and covers configuration, sending documents for e-signature through the Autenti API, and monitoring signature status in Creatio.

2.2 PREREQUISITES

Before you begin make sure you meet the following requirements:

1. You have an **active Autenti account/subscription** with API access and credentials.
2. You have a **Creatio environment with permissions** to install Marketplace applications and run business processes.
3. The Autenti Connector for Creatio depends on the following **Creatio apps** - ensure they're **installed** in your environment:
   - Customer 360
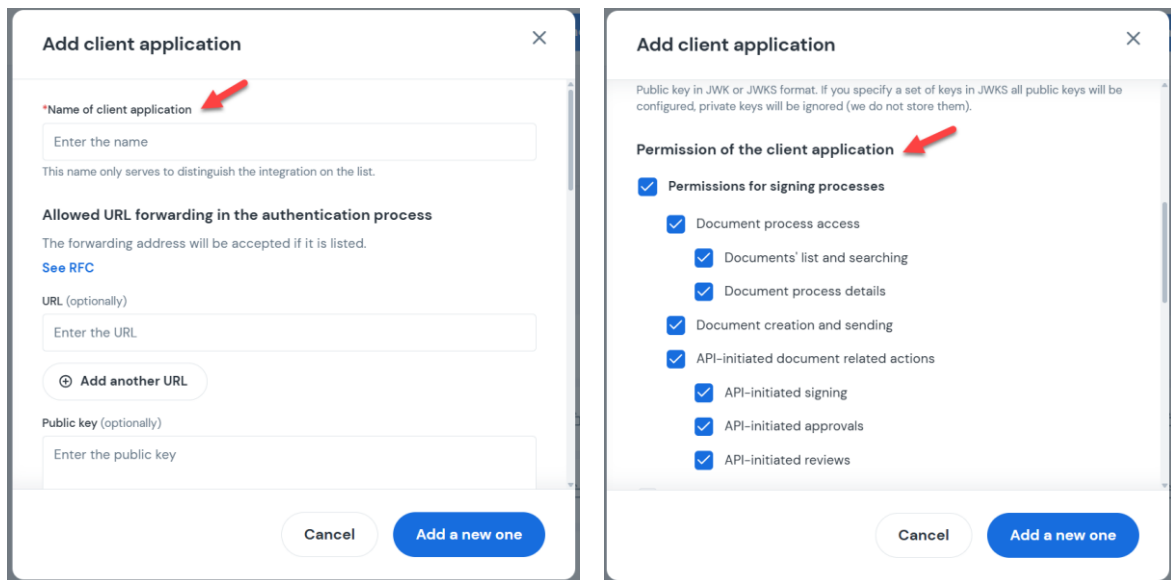   - Order and Contract Management

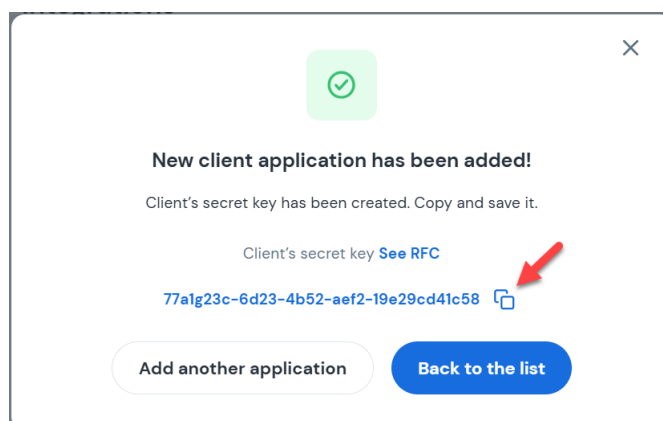# 3. GETTING STARTED

3.1 CREATE API CLIENT IN AUTENTI ACCOUNT

1. Sign in to your Autenti account and open Integration settings.
2. Click **Add new**.

Integrations

API client applications   ◎ SSO   External applications

List of API client applications   ⊕ Add new
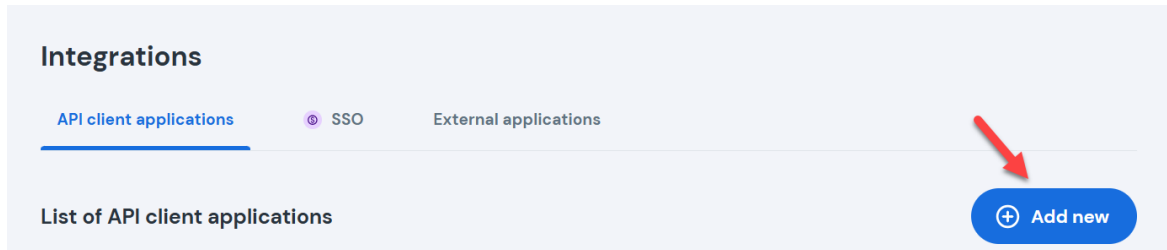
3. In the form:
   a. Enter a **Name of client application**.
   b. In **Permissions**, select **Permissions for signing processes** and include API-initiated document-related actions.

Add client application   ✕

*Name of client application

Enter the name

This name only serves to distinguish the integration on the list.

Allowed URL forwarding in the authentication process

The forwarding address will be accepted if it is listed.

See RFC

URL (optionally)

Enter the URL

⊕ Add another URL

Public key (optionally)

Enter the public key

Cancel   Add a new one

Add client application   ✕

Public key in JWK or JWKS format. If you specify a set of keys in JWKS all public keys will be
configured, private keys will be ignored (we do not store them).

Permission of the client application

☑ **Permissions for signing processes**
   ☑ Document process access
      ☑ Documents' list and searching
      ☑ Document process details
   ☑ Document creation and sending
   ☑ API-initiated document related actions
      ☑ API-initiated signing
      ☑ API-initiated approvals
      ☑ API-initiated reviews

Cancel   Add a new one

4. Click **Add a new one** to create the client.
5. Copy the **Client secret key**. Store it securely – you won't be able to view it again.

✕

✓

New client application has been added!

Client's secret key has been created. Copy and save it.

Client's secret key **See RFC**

77a1g23c-6d23-4b52-aef2-19e29cd41c58 ⎘

Add another application   Back to the list

6. Return to the API clients list and copy the **Client application ID** (shown as **Identifier** in the list).
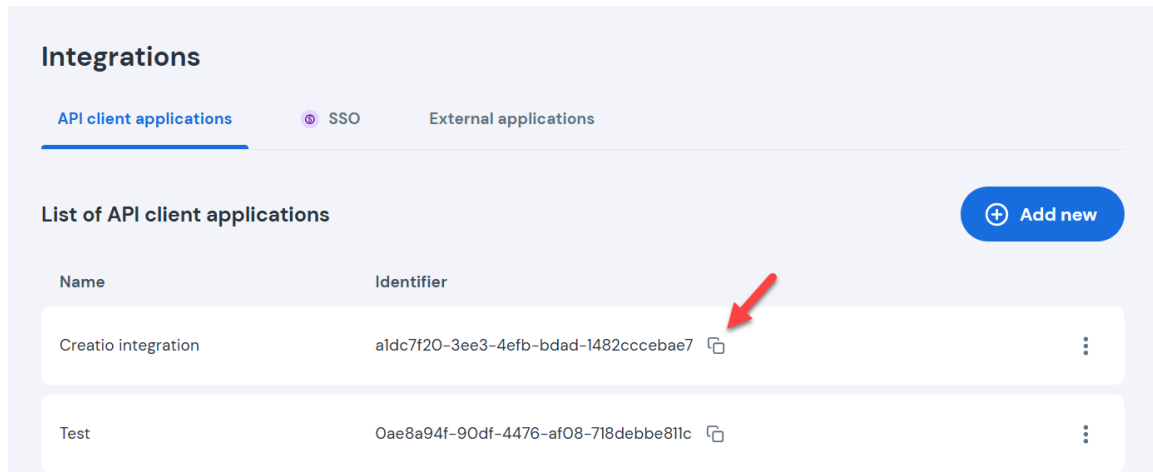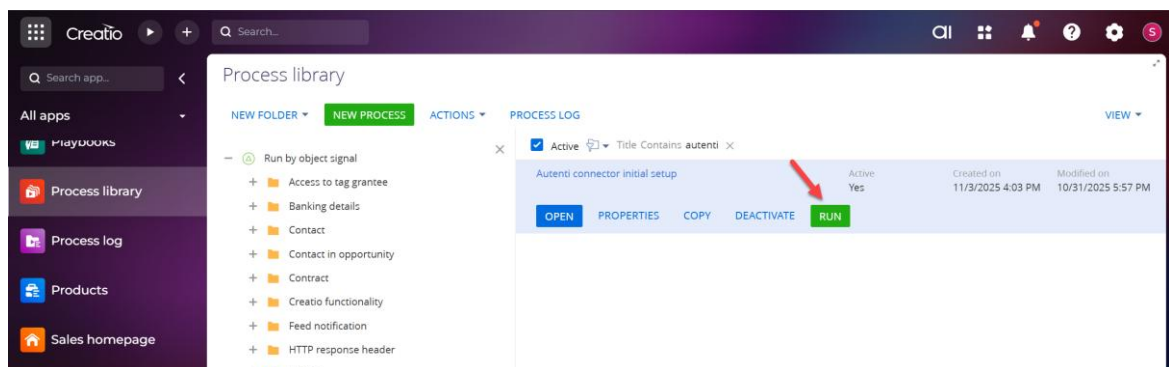

NOTE: You'll need these later during Creatio setup:

- Client application ID
- Client secret key

3.2 CONFIGURE AUTENTI CONNECTOR

You can configure the Autenti Connector via a business process.

1. Open **Process library**.
2. Run **Autenti connector initial setup** process.

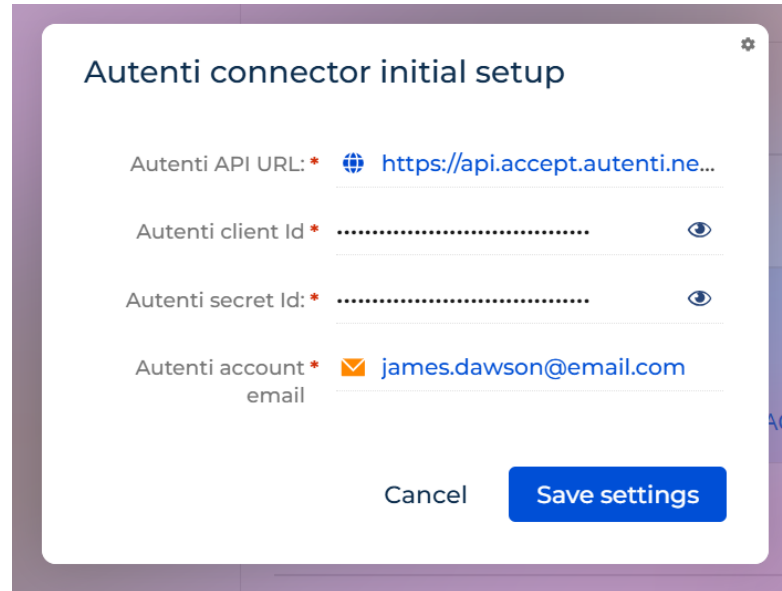
3. In the form provide:
   a. **Autenti API URL**.

Production URL:

https://api.autenti.com/api/v2/

Test (acceptance) URL:

https://api.accept.autenti.net/api/v2/

NOTE: Production and test are separate Autenti instances. Ensure your API client was created in the same environment you enter here.

b. **Autenti client Id** (see **Client application ID** from [Create API client in Autenti account](#)).
c. **Autenti secret Id** (see **Client secret key** from [Create API client in Autenti account](#)).
d. **Autenti account email** (the email linked to your Autenti account).
e. Click **Save settings** to update Creatio configuration (all values are stored as system parameters).

Autenti connector initial setup

Autenti API URL: * 🌐 https://api.accept.autenti.ne…
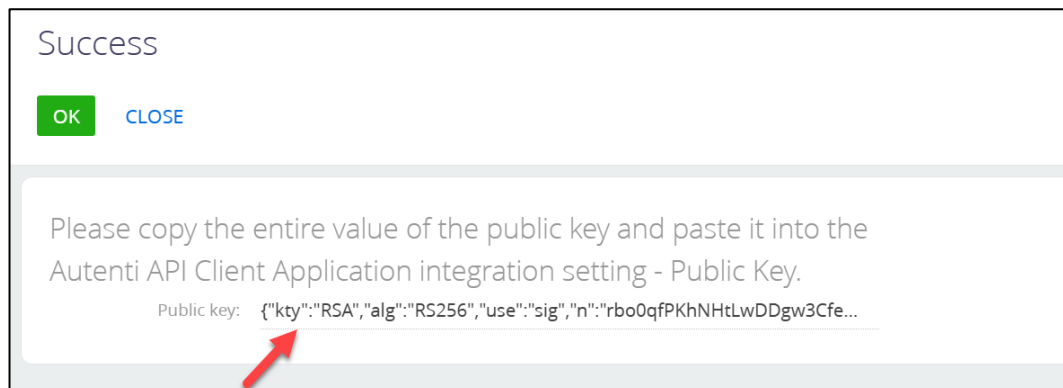
Autenti client Id * ······························ 👁

Autenti secret Id: * ······························ 👁

Autenti account * ✉ james.dawson@email.com
email

Cancel   **Save settings**

4. On the success message, a **Public key** is displayed. Copy **the entire value** and store it securely—you won't be able to view it again.

Success

OK   CLOSE

Please copy the entire value of the public key and paste it into the Autenti API Client Application integration setting - Public Key.

Public key: {"kty":"RSA","alg":"RS256","use":"sig","n":"rbo0qfPKhNHtLwDDgw3Cfe…

5. Click **OK** to complete the setup.

NOTE: You'll need these later during Autenti configuration:
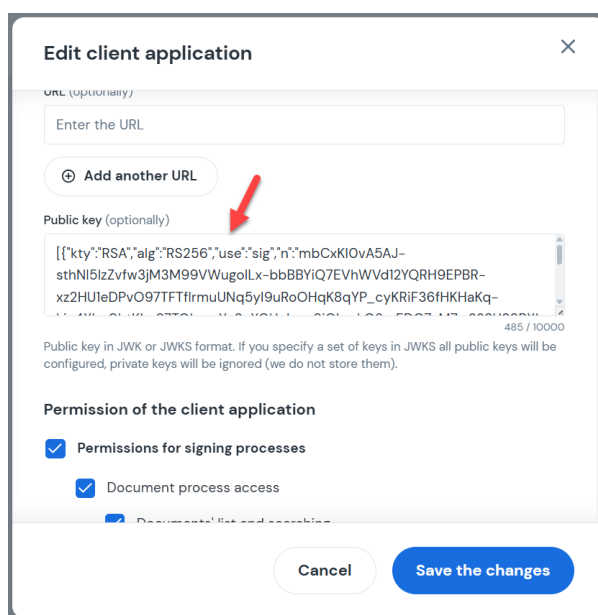
- Public key

3.3 CONFIGURE API CLIENT IN AUTENTI ACCOUNT

1. Sign in to your Autenti account and open [Integration settings](#).
2. For the API client you created earlier, open the three-dot menu and click Edit.
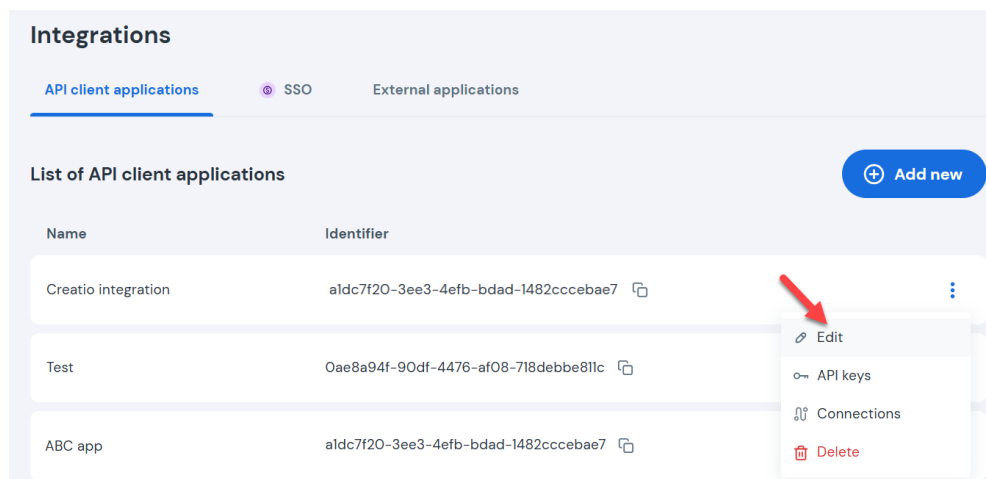
3. In the form:
    a. Paste your **Public key** value from Creatio into the **Publick key** field.

4. Click **Save the changes**.

Your Autenti Connector for Creatio is now configured and ready to use.

4. SENDING DOCUMENTS FOR E-SIGNATURE

4.1 WHAT'S AN ENVELOPE?

The Autenti Connector for Creatio uses an object called **an envelope** - a container for a single e-signature transaction. An envelope bundles everything Autenti needs to run the signing flow, including:

- Document to be signed
- Participant (signer) and their role

4.2 FREE EDITION LIMITATIONS

The free edition currently supports one document and one participant per envelope. For more information and pricing on using the advanced capabilities of the Autenti Connector - such as multiple documents per envelope, multiple participants with roles, and sequential/parallel signing - please contact Solbricks.
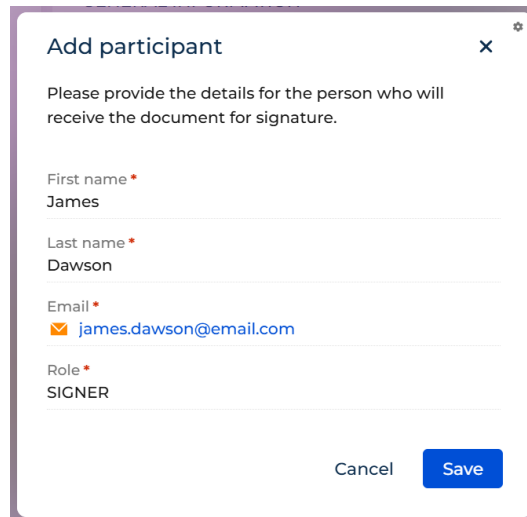
4.3 CREATE AN ENVELOPE

1. Open the Document record in Creatio.
2. Upload a file to the document. **Create envelope** button is enabled after a file is uploaded.

NOTE: Autenti accepts files with the following extensions: PDF, DOC, DOCX, ODS, ODT, XLS, XLSX.
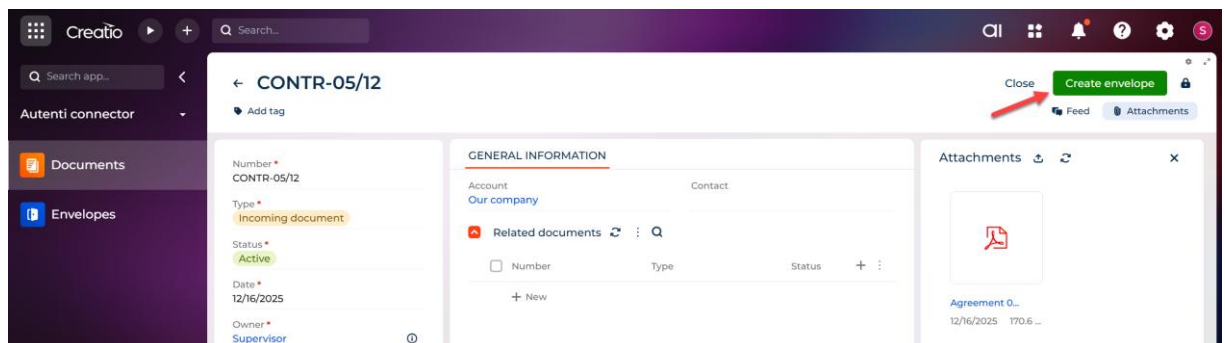
3. Click **Create envelope.**
4. In the **Participant** form, enter:
   a. **First name**
   b. **Last name**
   c. **Email**
   d. **Role** is set to **SIGNER** by default.
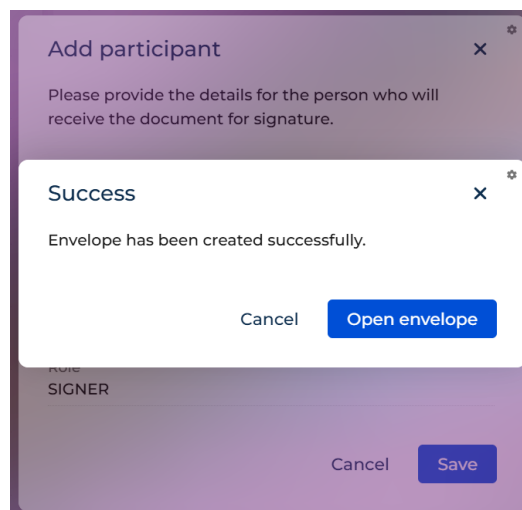
5. Click **Save**. A dialog appears – choose **Open envelope** to navigate to the new envelope, or **Cancel** to stay on the document.
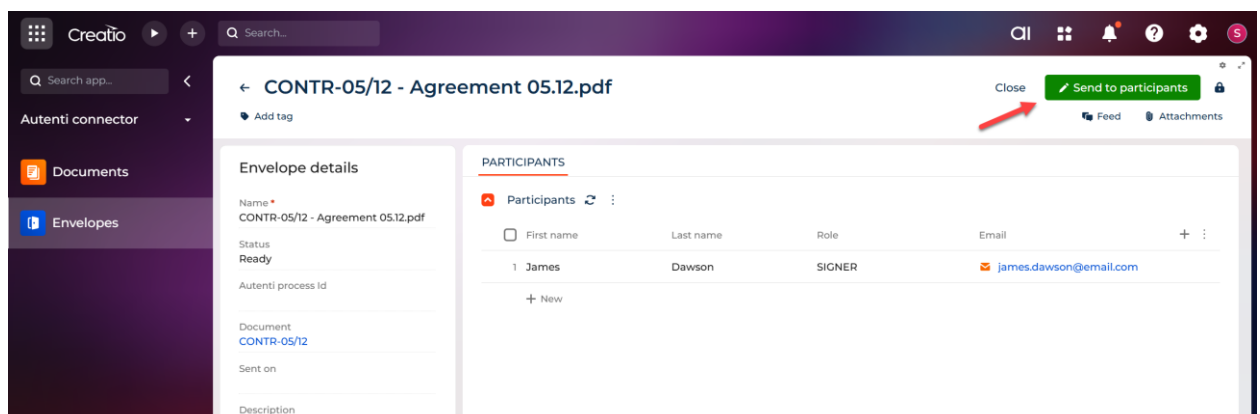

NOTE: Ensure the **participant's email is valid** – Autenti sends the signing invite to this address.

4.4 SEND TO PARTICIPANTS
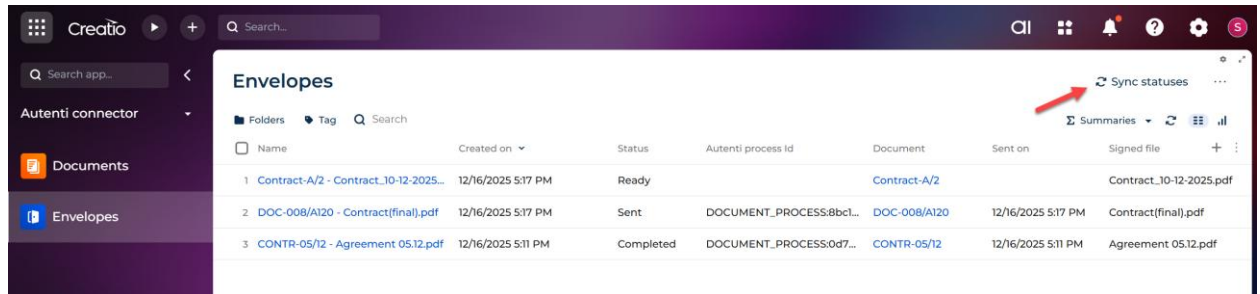
1. Open the envelope in **Ready** status.

2. Click **Send to participants**. The file is uploaded to Autenti as a draft and then sent to the participant's email for e-signature.

NOTE: If sending fails, check API configuration and the Autenti environment (test vs. production) – see Getting Started.

4.5 TRACK STATUS IN CREATIO

1. Open the **Envelopes** section.

2. Click **Sync statuses** to refresh the status of all envelopes.