

Creatio

DocuSign Connector for Creatio

USER GUIDE



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DocuSign Connector

Creatio

Creatio is a low-code software-as-a-service solution for process management and CRM. Creatio's solution stack included Studio Creatio, a low-code platform, Sales Creatio, a sales force automation program, Marketing Creatio, and Service Creatio. It can be utilized to automate company processes, implement rules into place, and create third party connectors. The framework was built in .NET, customizations and scripts are built either in C# (server-side code) or JavaScript (client-side code). The Creatio Partner Network is a global network of more than 700 businesses located in 110 nations. Recently, Creatio is launching the No-code Magic Campaign to Promote the Power of No code. Creatio is a next-generation CRM that can be the ideal instrument to help businesses become customercentric enterprises by giving customers a seamless, consistent experience as they transition from leads to loyalty.

DocuSign Connector

This connector acts as a facilitator to integrate a customer's DocuSign Account with Creatio Opportunity and Contract Sections to initialize/track Document e-signature process carried out through DocuSign Platform.

Setting up the Connector

Setting up DocuSign Developer Account

If you already have a developer account skip the next step.

- First go to the below link and click on Create Account. <u>Docusign developer account</u>
- Fill in the required information and create the account for yourself. After you create the account you will be redirected to a page similar as below.

← → C S developers.doc	usign.com/platform/account/	ତ୍ସ	Ç ☆	0	Ð		0	
NEW Join API Office Hours for a Quickstart	demo of multiple APIs and Q&A live from Seattle - April 2 - 10am PT - REGISTER					Doc	uSign.co	om
	APIs & SDKs \sim Get Started Tools \sim Support Community $$ Pricing $$ Partners $$	More 🗸				Q	8	
Platform 101	Developer account							
∧ Platform 101	A DocuSign developer account enables you to develop and test your app in an <u>environment</u> that's	isolated fro	om the pi	roduct	ion			
 Build a DocuSign integration Configure your app 	environment. It's also referred to as the <i>demo environment</i> or a <i>demo account</i> , and was previously Creating an account is the first step in getting started with DocuSign. Then, you can <u>add and conf</u> an <u>integration key</u> for it. After you finish developing your DocuSign integration, you promote your a through our <u>Go-Live</u> process, which requires a DocuSign <u>production enterprise account or API plan</u>	figure your o Ipp's integro	app in the	e acco	unt and	d obta	in	lback
Developer account								Feed
Switch to an admin	Create an account							
account profile	To create an account, select Developer Account at the top of this page or any other <u>Developer C</u> Account. You can also use the button below.	<u>enter</u> page,	then cho	oose C	reate			
Platform concepts								
✓ Authenticate	Create account							
 Single-page applications and CORS 	Note: If your company email policy prevents you from using your company email address for a deve account with a personal email address.	eloper acco	iunt, you	can sig	jn up fo	or an		

• Click on the profile icon at right top and click on "My apps and Keys"

	Docusi 🛃 Develo 💆 DocuSi 💆 Develo	🛛 👽 Log In 🕴 👱	Welcon 🚺 Apple \ 🤆) mitra ir 📔 👱 Develd	¥ A _F ×	🎯 New Ta	. +		
	docusign.com/apps-and-keys					۹ ★	• D	* (• 😔
DocuSign eSignature	Home Agreements Templates R	eports Settin	gs						0 OD
litra count (D: 24037751	New DocuSign apps must use <u>OAuth 20</u> <u>Transition Page</u> for details around phase	authentication (for and customers im	REST apps) or <u>App Password</u> pacted for existing integration	<u>l authentication</u> (for SC s.	AP apps) to pas	ss go-live review	. Please follo	w the	
Overview	Apps and Keys When building a DocuSign Integration, you must first create an	app and integration key.	This key is required to call any Docu:	Sign API, either directly or by (sing on SDK.				
COUNT	Create apps and keys manually or edit keys created automatic	ally for you by <u>Quickstor</u>							
Plan and Billing Account Profile	 My Account Information 								
Account Frome									
	User ID		API Account ID		Account	Base URI			
Security Settings	Victorial and Control of Control	Ō	API Account ID e4bf262c-b1e4-449f-b53e-d8fa	773c1b96		Base URI emo.docusign.net			
Security Settings	db93db59-e9ec-470d-ac3d-lc39cf5cb871	6		M3c1b96					
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Security Settings Regional Settings	db93db59-e9ec-470d-ac3d-lc39cf5cb871	6		Macibole		emo.docusign.net	id App and li		Kay

- Click on "ADD APP AND INTEGRATION KEY".
- Give the Application a Name (eg:Creatio-Integration).
- Under Authentication-User Application Select "Authorization Code Grant" And then Click "Add Secret Key", which will create a new Secret Key for this application. (Please make sure to have this key securely stored with yourself).

DocuSign eSignature	Home Agreements Templates Reports Settings
Value Calculator	User Application
USERS AND GROUPS	Is your application able to securely store a client secret?
Users	Yes No
Permission Profiles	
Groups	Authentication Method for your App Authorization Code Grant
Signing Groups	Used for integrations where each user logs in individually and requires a one-time consent for the app to use their account.
SIGNING AND SENDING	Require Proof Key for Code Exchange (PKCE) RECOMMENDED Requires all requests to include a code verifier and code challenge, which protects your app against malicious attacks.
Signing Settings	Secret Keys
Sending Settings	× 74406976-af92-4680-97a4-cf53ea2fc80d
Identity Verification	+ Add Secret Key

Under "Additional Settings" .Click "Add URI" and create an entry in the following format.
 {your_Instance_Base_URL}/0/rest/MLCDSIAuthCallbackService/OauthCallback}

E.g. (https://myDemoSite.creatio.com/0/rest/MLCDSIAuthCallbackService/OauthCallback₃)

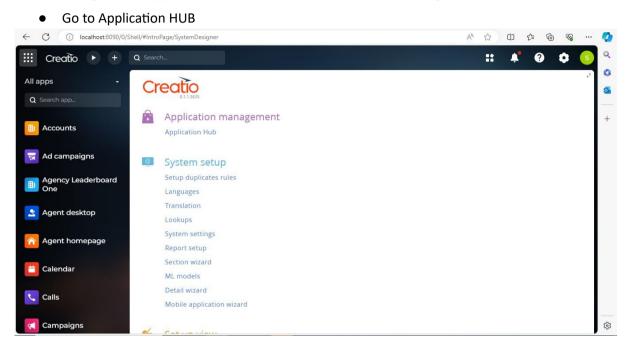
DocuSign eSignature	Home Agreements Templates Reports Settings
Comments	Additional settings
Document Custom Fields	Redirect URIs
Envelope Custom Fields	× http://localhost:8090/0/rest/MLCD
INTEGRATIONS	+ Add URI
Connect	Link to Privacy Policy
Apps and Keys	http://www.example.com/privacy
API Usage Center	Link to Terms of Use
CORS	http://www.example.com/terms
Payments	CORS Configuration
AGREEMENT ACTIONS	To enable API calls from a browser via CORS, add at least one origin URL below. For more information see CORS Overview,
Rules	Origin URLs

• Then Save the record.

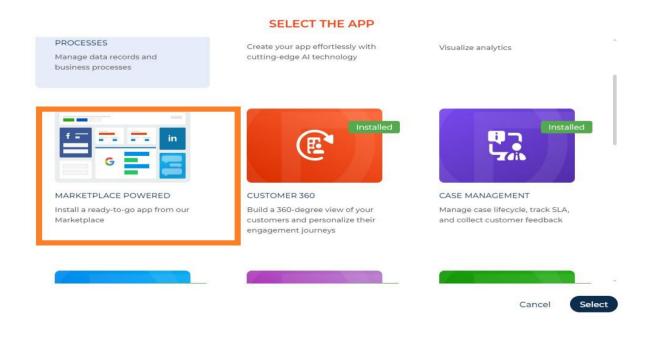
Configuring Instructions

To start off with setting up the connector in your instance, please follow the below steps.

• First go to the Application HUB and Install the Connector through the Marketplace.



- Click "New Application" .
- Select "MarketPlace Powered" .

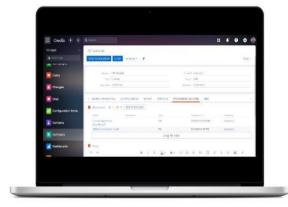


• Then Search for "DocuSign Connector" from Mitra Innovation	
C C https://marketplace.creatio.com/catalog	
CreatioMarketplace	
DocuSign Connector mitra innova Q 1 solutions Remove filters ×	
Connectors Applications MITRA MITRA CONNUCCUSIGN	
Category V Connectors 1	
Document Management 1 Applications 1 Sales 1	
Cost	
Paid 1	

• Then select the application. And in the Install tab put the BaseUrl of your instance. And click "Install".



Try the 14-day free tria	l of the application with	your Creatio system.
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Packages	
	Â
	Г
Install	
Install form, you confirm that you agree with sharing a with the App developer specified on the App's ffer Agreeemar, and the relevant T&C pp's page.	
	Install form, you confirm that you agree with sharing i with the App developer specified on the App's ffer Agreement, and the relevant T&C

Docusign Connector Related System Settings

• After Installation Succeeded, go to the system settings, Then search by keyword "DocuSign".

System settings			
NEW FOLDER - ADD SETTING ACTIONS -			VIEW -
- 🛨 Favorites	ᠹ] ▼ Name Contains DocuSign × Name	Code	
- 📔 All	DocuSign Creation Page URL	MLCDSIDocuSignCreationPageURL	
+ Emails section settings	DocuSign Client Secret Key DocuSign Base URL	MLCDSDocuSignClientSecretKey MLCDSIDocuSignBaseURL	
 Landing pages section settings Leads section settings 	DocuSign Redirect URL DocuSign Client ID	MLCDSDocuSignRedirectURL MLCDSIDocuSignClientID	
2FA	Docapilla cilenci D	MECDODOCCOSIGNCHENTLD	

• Find and update the values of them as below.

1. DocuSign Client Secret Key

Provide the value you got from the Authentication-> Secret Keys while setting up the application in DocuSign Account.

2. DocuSign Creation Page URL

Provide the value in the Following format.

{your_Instance_BaseURL}/0/shell/#CardSchemaViewModule/MLCDSCDoc uSignRequestCreationPage/edit/}

3. DocuSign Base URL

Provide the Value under "Apps and Keys" page in "Account Base URI" detail in the following format. {AccountBaseURI}/restapi/}

4. DocuSign Redirect URL

Provide the value you added to the Redirect URLs under Additional Settings while setting up the application in DocuSign Account.

5. DocuSign Client ID

Provide the value you got from the General Info ->

Integration Key (Under AppName)

while setting up the application in DocuSign Account.

After that Check whether you have access to a Section Named as **"DocuSign Requests"**. If not please contact us for assistance.

Using DocuSign Connector Features

Create a DocuSign Request from Opportunity/Contract

From Opportunity Section or Contract Section

Navigate to the Opportunity section/Contract Section. And Select the opportunity/Contract you want to create a DocuSign Envelope for. There are two ways you can create a DocuSign Envelope Request.

1. From Record Directly without attaching Documents.

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All apps 🚽	008 Accom / Sale of Goods (sample)		
Q Search app.,,	SEND TO DOCUSIGN NEW ORDER CLOSE	ACTIONS - 🖉	VIEW *
Marketing plans	Confidence Level Qualific		Constracting Closed won -
🚺 Message templates	0 100 NEXT ST	TEPS (0) 🥲 🖾 🖬 🍽 🔘 🦪 🕲	
😝 ML models	Predictive probabi Days in funnel 0% 882		re any tasks yet re to add a task
Opportunities	Customer*		
Crders		PORTUNITY DETAILS LEADS TACTICS AND COMPETITO	ORS PRODUCTS TIMELINE OPPORTUN>
Partnership	S BANT O) Existing customer	
😰 Problems	Budget 3,500.00 Oppo	Name* 008 Accom / Sale of Goods (sample)	Division. Direct sales team
Process library	Decision maker Andrew Baker (sample)	Probability, % 20 Catezory Medium business	*Owner* Supervisor Source Customer referral

Click on the "Send to DocuSign" Button which will redirect you to a DocuSign Request Creation page. If you are not already authenticated with DocuSign using Creatio.

If you are not already authenticating with DocuSign using Creatio, you will be redirected to DocuSign to authenticate your account. Where you will be asked to enter the username and passwords. Then you will be again redirected to Creatio.

← 008 Accom / Sale of Goods (sample)	Send Close 🔒
Number * DSR-0000190	Initiated On
Name * 008 Accom / Sale of Goods (sample)	Message Template *
GENERAL INFORMATION	
Attachments	
Connected To Participants	
Email Configurations	
Signer Email Subject	
	Number * DSR-0000190 Name * 008 Accom / Sale of Coods (sample) GENERAL INFORMATION Attachments Connected To Participants Participants Email Configurations

- This will be the place where you have to define the DocuSign Request Envelope settings.
- The Number/Name and Initiated will be automatically generated and filled in.
- Next you have to select the Envelope Template you would like to use for your new Envelope. (These templates will be automatically taken from your DocuSign Account upon authentication).
- After selecting this, you need to attach the relevant Documents under the Attachments Detail which matches your Template. Then you need to match the Document Attached with the Template Document using the "Template Document" Lookup in the Attachment record as below.

If you have the issue with filling in in the Attachments detail – Template Document Lookup, please Generate Schema for all and /Compile the environment, then retry.

III Creatio 🕨 +	Q Search_	::	· 📫	0	s
All apps - Q Search app	← 201 (sample)		Send	Close	a
Contacts	Number * DSR-0000182	Initiated On 3/13/2023 1:36 AM			
Contracts	Name* 201 (sample)	Message Template * Agreement			_
1 Dashboards	GENERAL INFORMATION				
Documents	🖸 Attachments 🕹 🥏 Q Search				
DocuSign Requests	Name A			+	£
C Email					-
P Events					
Feed					

- Next under the Participants you will need to specify the people who will be signing/receiving the Envelope.
- (Note: If it's created from the opportunity section the people in the Contacts Detail of Opportunity will be automatically added to the DocuSign Request Participants. If not you need to add manually).
- Also, participants should have a valid email in the system.
- Next you need to specify the order in which the participants will be involved as below in the Order Column.

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All apps - Q Search app	← 008 Accom / Sale of Goods (sample)	o Send Close 备
👸 Marketing plans	Connected To		
😰 Message templates	Contact Role	Order 🔺	+ :
😝 ML models	1 Andrew Baker (sample) 2 Deshan Jayawardana	1	
C Orders	Email Configurations		
Partnership	Signer Email Subject Complete with DocuSign: MSTeams Connector.pdf		
🕫 Problems	Signer Email Body		
Process library			

- Next you can specify the email subject/Body of the email notification to the participants. By default this will have values defined in the DocuSign Template, but you can edit it.
- After all these steps, you can save the record and click on "Send" Button to send the envelope for signatures. If everything went well, you'll be getting a confirmation popup mentioning it's successful. Then you can close this page. Later if you need to check the details of the DocuSign Request, you can navigate to the "DocuSign Requests" Section and view all the information as below.

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lapps •	+ 201 (sample)			Cancel Request Sym	Close &
2 Search app.				Se feed	Attachments
Configuration items		GENERAL INFORM	(TION		
Contacts	Code * DSR-0000182	-			
	Name * 201 (sample)	Remarka			
Contracts	Owner * Supervisor	1. T. I.	1/13/2023136 AM	Camplele Dr.	
Dashboards	Status sent	Participants +		Compare Or.	
Documents	Last Status Received Dr. 3/12/2023 8:06 PM	Order •	Finie	Contact	tmail (+)
	Envengeld Trock880-b4af-411-86ec-35ct783.	1.1	Client	Andrew Baker (sample)	djayewardana@r
DocuSign Requests	71040888-0448-411-8640-3507783.	2.2	Signer	Deshan Jayawardana	deshanj@gmail/
Email					

2. From Opportunity or Contract Section Attachments by attaching Documents Automatically.(Only available in Classic UI for now)

• For this, you need to go to the "Attachments and Notes" tab of the Opportunity or Contract record. Then you need to select the attachment you need to attach to your DocuSign Request Envelope.

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All apps 🚽	008 Accom / Sale of XER3294			
Q Search app	SEND TO DOCUSIGN NEW ORDER	CLOSE ACTIONS -		VIEW *
Marketing plans	0 100			28
🚺 Message templates	Predictive probabi Days in funnel 0% 930	(F)	You don't have any tasks y	et
😝 ML models	Customer*		Press 🗏 above to add a ta	sk
Opportunities	Days at current stage: 2405	CITS TIMELINE OPPORTUNITY HISTORY	ATTACHMENTS AND NOTES	CUSTOMER HISTORY FEED >
Orders	BANT	Attachments 🖉 : 🎫 💷 SEND TO D	Type A Created	d on Created by
Partnership	Budget 3,500.00	Account Planning New.pdf	File 4/18/20	023 4:36 AM Supervisor
😰 Problems	Decision maker Andrew Baker (sample)	MSTeams Connector.pdf		023 10:12 AM Supervisor
Process library	Customer need* Hardware	Notes	Drag file here	1
	Closed on	110023		

 Then you need to click on the "Send to DocuSign" Blue Button (when hovered – which is just above the Attachments detail), which will create a request as same as the previous method. Then you will be redirected to the DocuSign Creation page to specify the settings of the envelope as in the previous scenario.

Sync Latest Changes of the DocuSign Request Manually.

• To get the latest updates of the DocuSign Request. You need to go to the DocuSign Request Section, then go to your request. And click the "Sync" (Green Button). Which will update the status of your request.

III Creatio 🕨 +	Q Search		:: *	0 0 0
All apps - Q Search app	← 201 (sample)		Cancel Request Sync	
Contracts	Code * DSR-0000182	CENERAL INFORMATION	/	
Dashboards	Name * 201 (sample)	Remarks Timeline		
Documents	Owner * Supervisor	Initiated On 3/13/2023 1:36 AM	Complete On	
DocuSign Requests	Status sent	Participants + 2 : Q		
	Last Status Received On 3/12/2023 8:06 PM	Order A Role	Contact	Email 🕂 :
email	EnvelopeId 71cec888-b4af-4111-86ec-35cf783	1 1 Client	Andrew Baker (sample)	djayawardana@r
Events		2 2 Signer	Deshan Jayawardana	deshanj@gmail.⁄
C Feed		🔼 Envelope History 🤰 🗄 Q		
Forecasts				

• There is an automatic sync for each 10mins, which will update all the DocuSign requests statuses. Also, during the sync if the envelope/request is completed. The signed document will be automatically retrieved and stored in Creatio in the respective DocuSign Request and the Contract/Opportunity record attachments. It will be renamed with the postfix "Signed" as below.

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All apps 🗸 🗸	← 008 Accom / Sale c	of XED3294	Cancel Request Sync	close
Q Search app		A ALIGEST	Feed	Attachments
Dashboards	Code *	GENERAL INFORMATION	Attachments 👌 🤰	×
Documents	DSR-0000268 Name *	Remarks		
DocuSign Requests	008 Accom / Sale of XER3294 Owner* Supervisor	Initiated On Complete On 5/4/2023 5:00 PM	Q	R
C Email	Status completed	🔼 Participants 🕂 🎜 🗄 Q		fearns Con
P Events	Last Status Received On 5/4/2023 11:30 AM	Order • Role + :	5/4/2023 5:12 F MSTeams_Connect	or-Signed.pdf
Feed	Envelopeld d532fb19-b6c3-4ceb-9354-d43b61	1 1 Client		
Forecasts				
localhost:8600/0/rest/FileService/Download/Sys	File/85d02f57-8d97-4287-9e01-28c29331d818	Envelope History 2 : Q		

Cancel/Void DocuSign Request

• To Cancel a DocuSign Request. You need to go to DocuSign Request Section, then go to your request. And Click the "Cancel Request" (Red Button). Which will cancel your request.

III Creatio 🕨 + Q Se				::	A	0	s
← 201 (sample)			Can	cel Request	Sync Feed	Close	e lients
Code * DSR-0000182	GENERAL INFORMATION						
Name * 201 (sample)	TImeline						
Owner * Supervisor	Initiated On 3/13/2023 1:36	5'AM	Complete On				
Status sent	🔼 Participants + 2 i Q						
Last Status Received On 3/12/2023 8:06 PM	Order 🔺 Role	Contact	Email			+	8
Envelopeld	1 1 Client	Andrew Bak	er (sample) djayawarda	na@mitral.com			
71cec888-b4af-4111-86ec-35cf783	2 2 Signer	Deshan Jaya	awardana deshanj@g	mail.com			
	🙆 Envelope History 🤰 🗄 Q	ı					

- If more clarification is needed about the process and the flows, please contact us.
 We can provide assistance with clear guidance.
- And we can configure more modifications and customization based on your process and requirements even in new sections, if needed.

For more details, please contact us.

- Mitra Innovation <u>innovate@mitrai.com</u>
- +44 (0) 203 908 1977
- www.mitrai.com



***END**