



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 are 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 customer centric 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

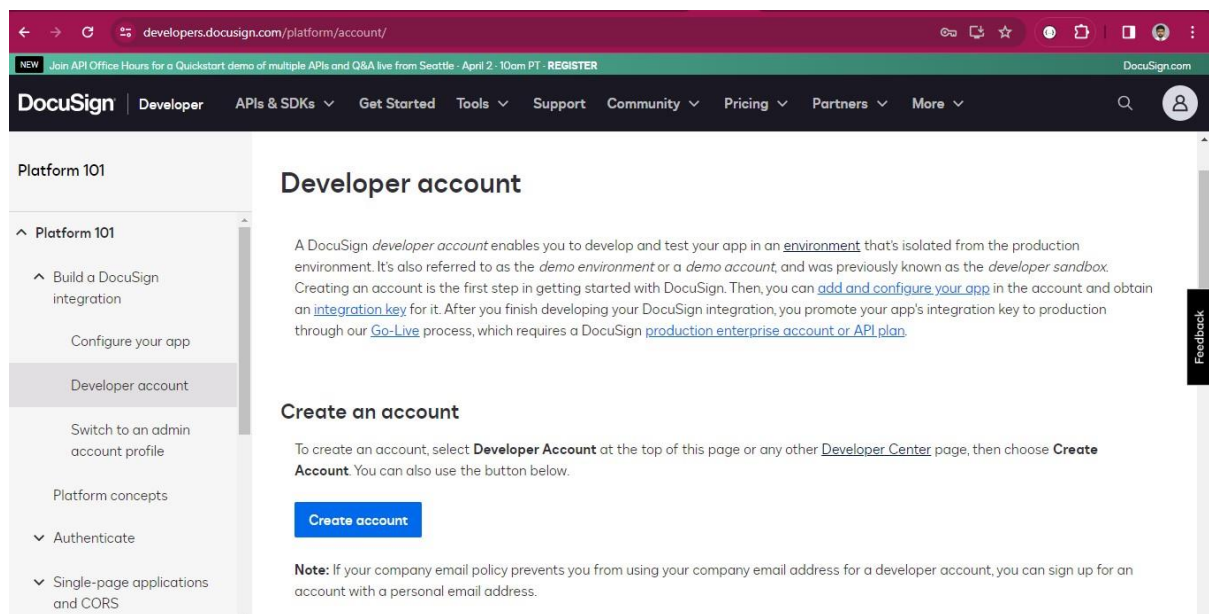
Setting up DocuSign Developer Account

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

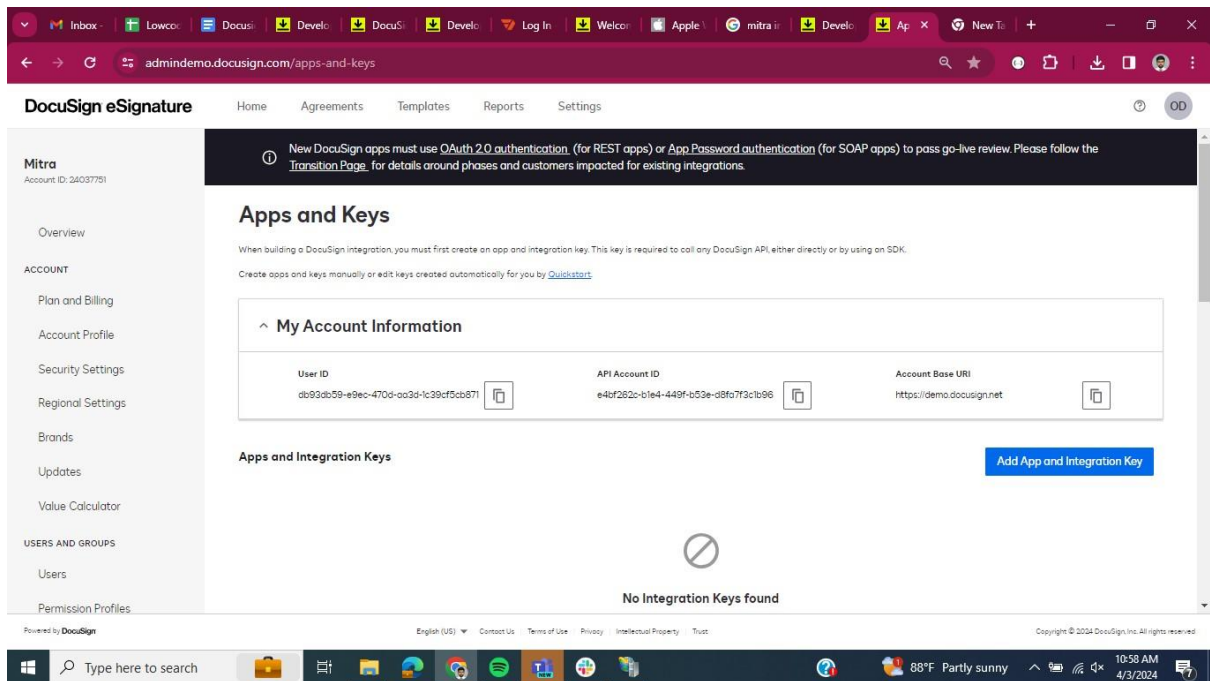
- First go to the below link and click on Create Account.

[DocuSign developer account](#)

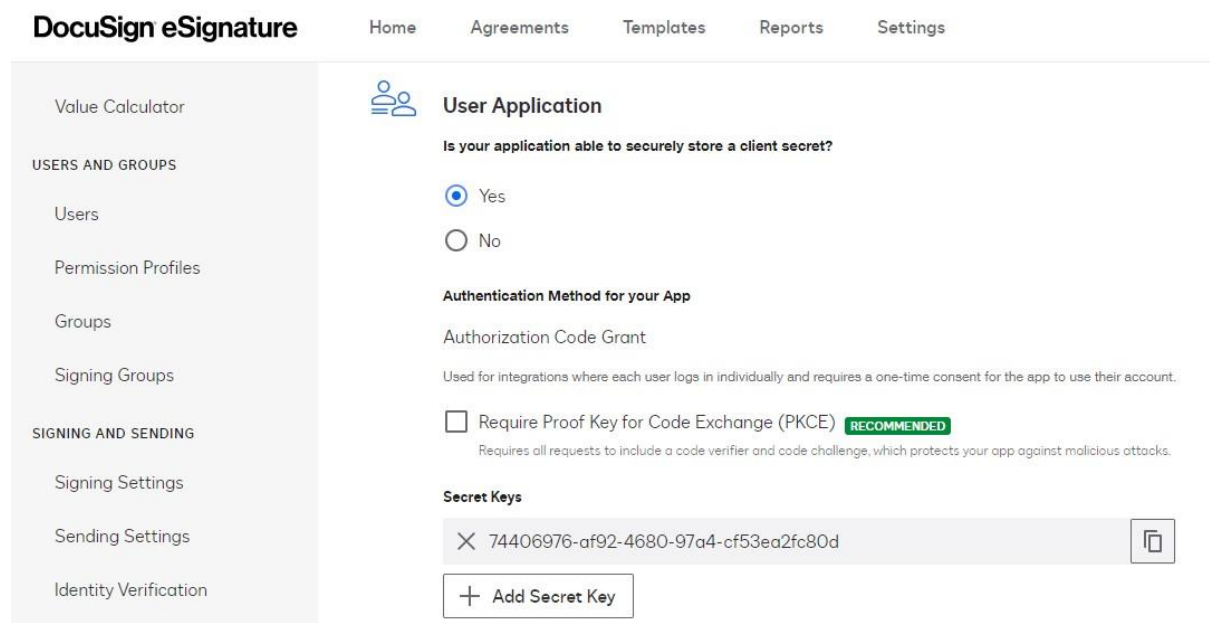
- Fill in the required information and create the account for yourself. After you create the account you will be redirected to a page similar as below.



- Click on the profile icon at right top and click on “My apps and Keys”



- 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 you).



- 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/OauthCallback>)

DocuSign eSignature

HomeAgreementsTemplatesReportsSettings

CommentsDocument Custom FieldsEnvelope Custom FieldsINTEGRATIONSConnectApps and KeysAPI Usage CenterCORSPaymentsAGREEMENT ACTIONSRules

Additional settings

Redirect URIs

✕ http://localhost:8090/0/rest/MLCD...

+ Add URI

Link to Privacy Policy

http://www.example.com/privacy

Link to Terms of Use

http://www.example.com/terms

CORS Configuration

To enable API calls from a browser via CORS, add at least one origin URL below. For more information see [CORS Overview](#).

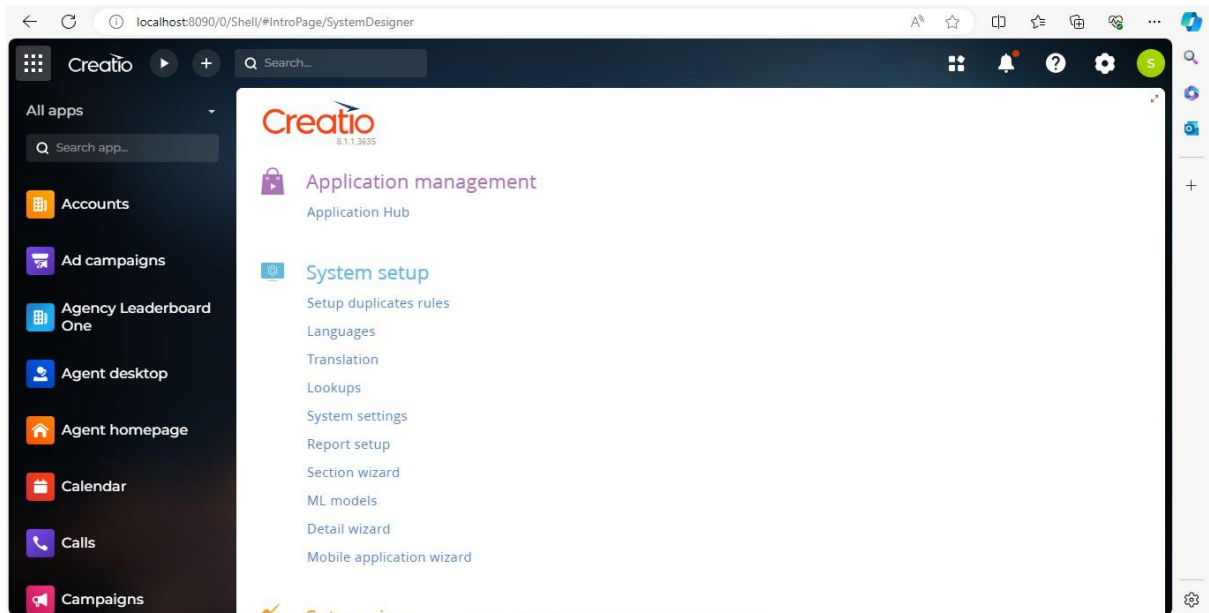
Origin URLs

- Then Save the record.

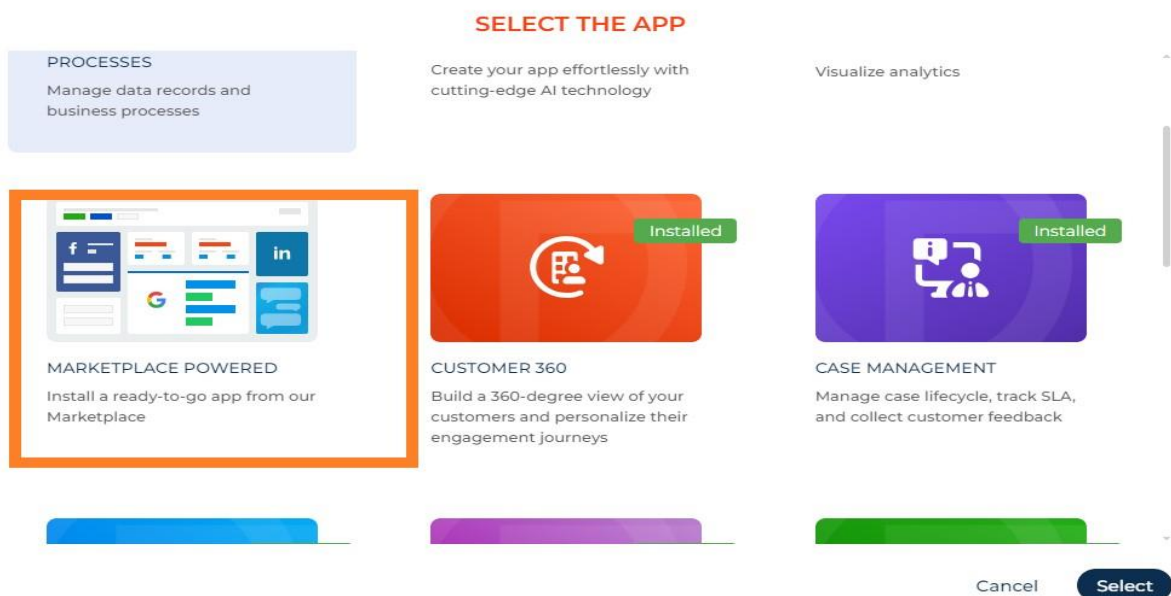
Configuring Instructions

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

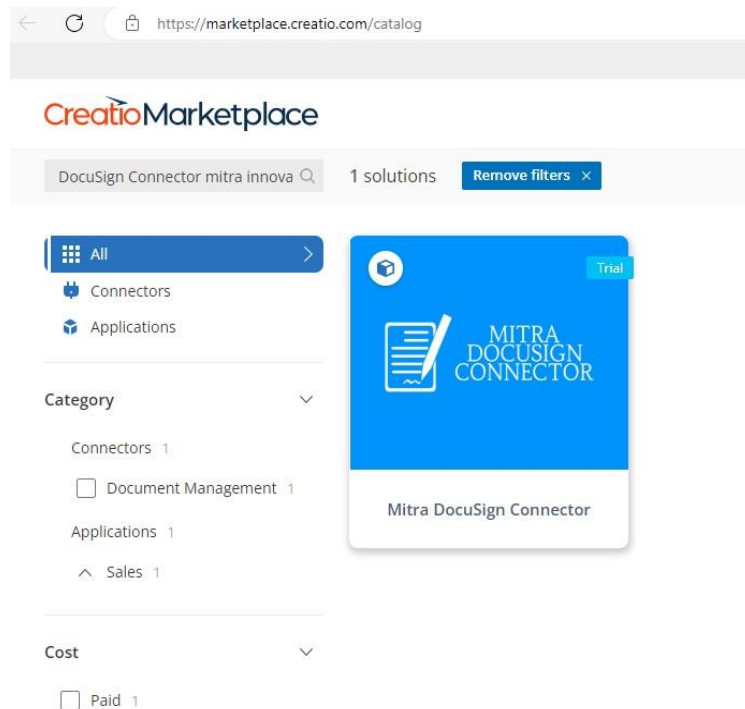
- First go to the Application HUB and Install the Connector through the Marketplace.
- Go to Application HUB



- Click “New Application”.
- Select “Marketplace Powered” .



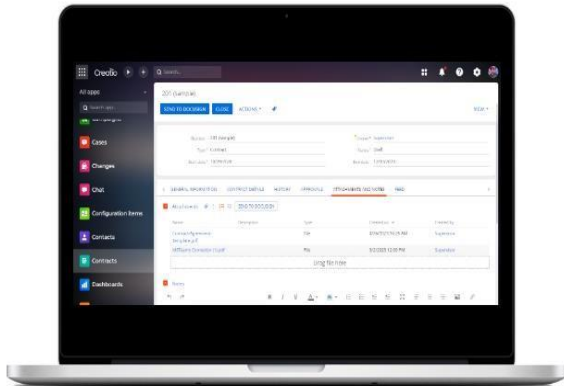
- Then Search for “DocuSign Connector” from Mitra Innovation



- Then select the application. And in the Install tab put the BaseUrl of your instance. And click “Install”.



Try the 14-day free trial of the application with your Creatio system.



Install

Packages

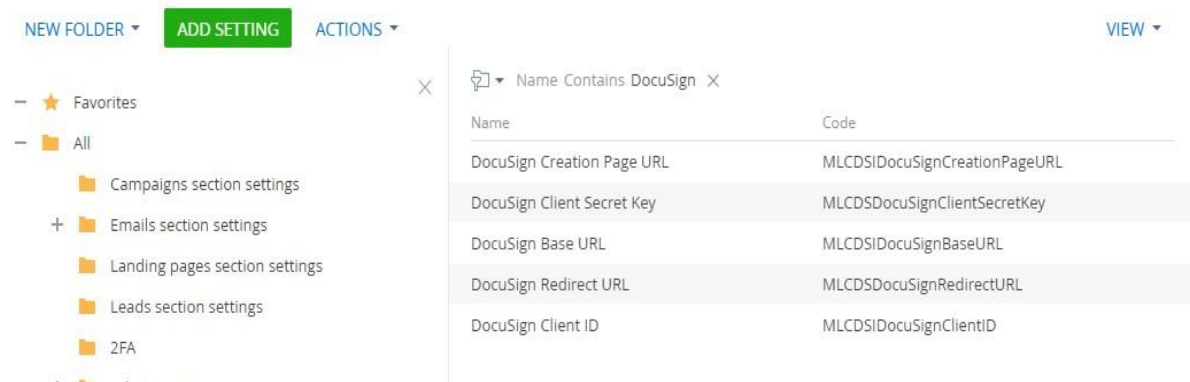
Install

By submitting this form, you confirm that you agree with sharing your personal data with the App developer specified on the App's page, the [Public Offer Agreement](#), and the relevant T&C published on the App's page.

DocuSign Connector Related System Settings

- After Installation Succeeded, go to the system settings, Then search by keyword “DocuSign”.
(or you can apply the predefined static folder “DocuSign Settings”)

System settings



- 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/MLCDSCDocuSignRequestCreationPage/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.

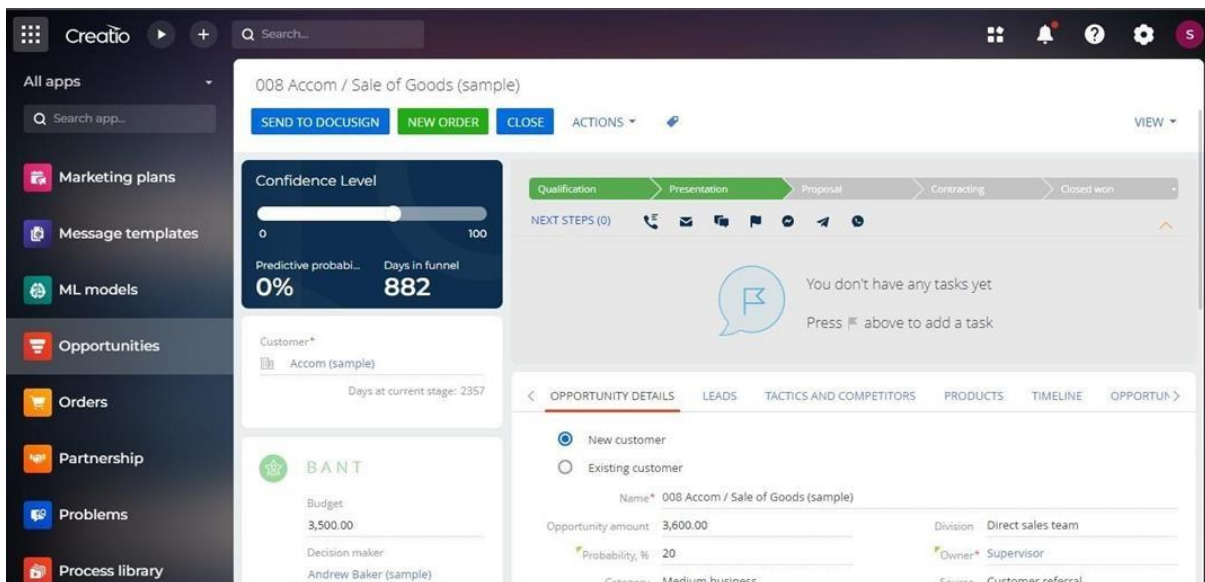
Using DocuSign Connector Features

Please note that the current version only supports sending envelopes with predefined DocuSign Templates. Therefore, make sure to have templated already created on your account before this step.

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.



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/passwords and also permission to give access.

Once you see the Successful Authorization message, you can close the authorization window comeback to Creatio. Then click on send to DocuSign Button again.

← 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

Signer Email Body

- This will be the place where you must 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. (this is done, in case of multiple documents within the envelope, to provide the proper mapping with the documents in the predefined template).

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.

← 201 (sample) Send Close

Number *
DSR-0000182

Initiated On
3/13/2023 1:36 AM

Name *
201 (sample)

Message Template *
Agreement

GENERAL INFORMATION

☒ Attachments 🔍 🔍 Search

Name: ⌵ + ⋮

1	MSTeams Connector.pdf	Account Planning.pdf
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- Next under the Participants you will need to specify the people who will be signing/receiving the Envelope.
- Next you need to specify the order in which the participants will be involved as below in the Order Column. (This should match the order of signing defined in the DocuSign Envelope template. Purpose of it is to map the Creatio contact with the signing role defined in the template)

The screenshot displays the Creatio user interface for configuring a DocuSign envelope. The top navigation bar includes the 'Creatio' logo and a search bar. The left sidebar lists various application categories. The main content area is titled '008 Accom / Sale of Goods (sample)' and features a 'Send' button. Below the title, there is a 'Connected To' section, followed by a 'Participants' section with a table. The table has columns for 'Contact', 'Role', and 'Order'. Two participants are listed: 'Andrew Baker (sample)' with order 1, and 'Deshan Jayawardana' with order 2. Below the table is an 'Email Configurations' section with fields for 'Signer Email Subject' (pre-filled with 'Complete with DocuSign: MSTEams Connector.pdf') and 'Signer Email Body'.

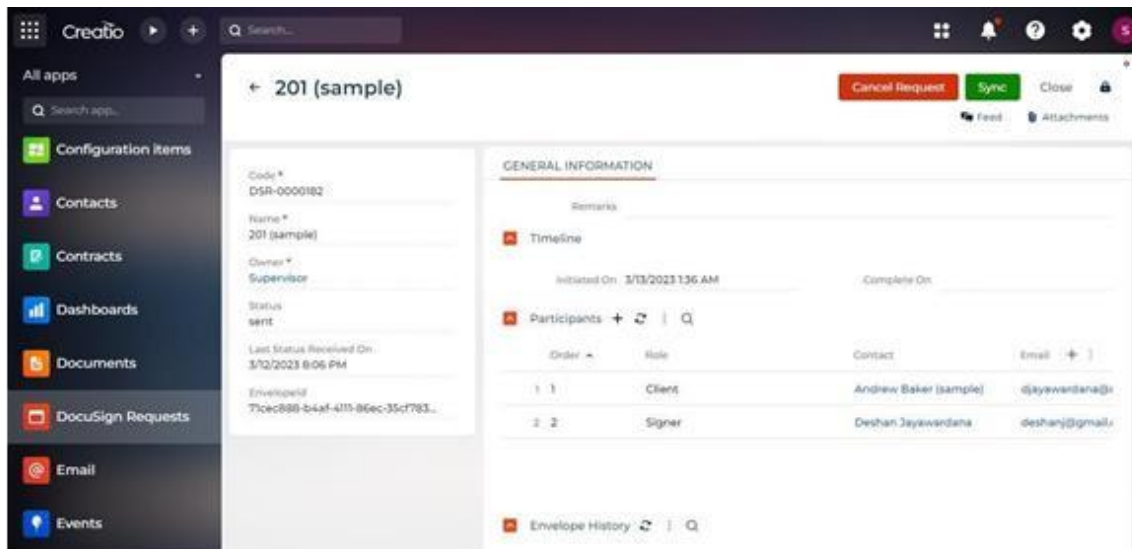
Contact	Role	Order
1 Andrew Baker (sample)		1
2 Deshan Jayawardana		2

Email Configurations

Signer Email Subject:
Complete with DocuSign: MSTEams Connector.pdf

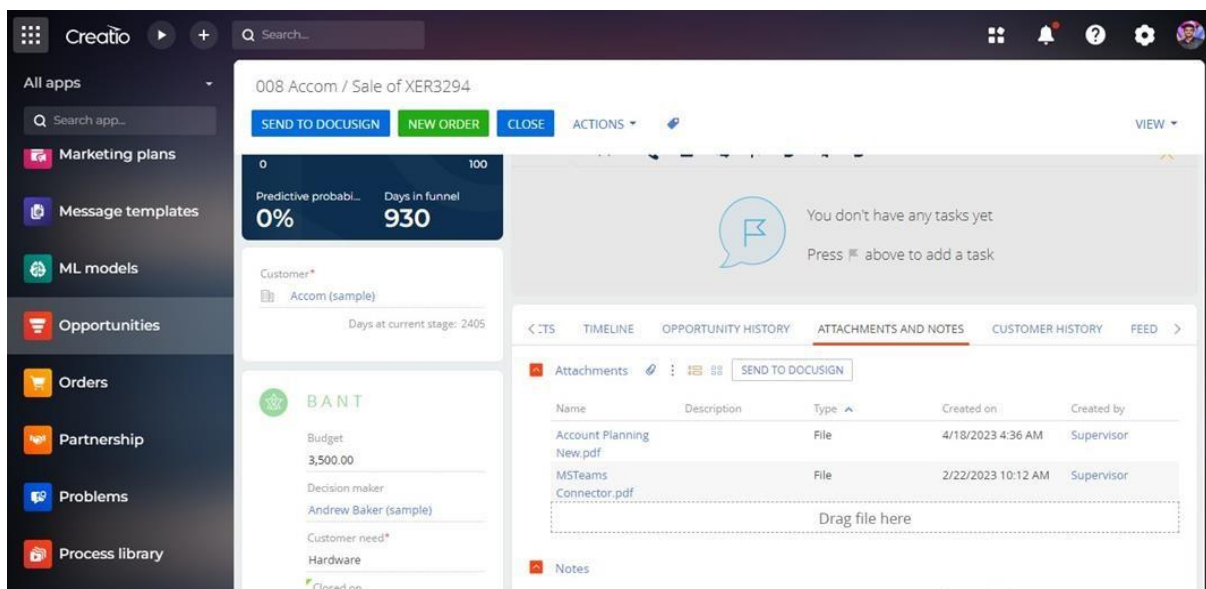
Signer Email Body:

- 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 below.



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

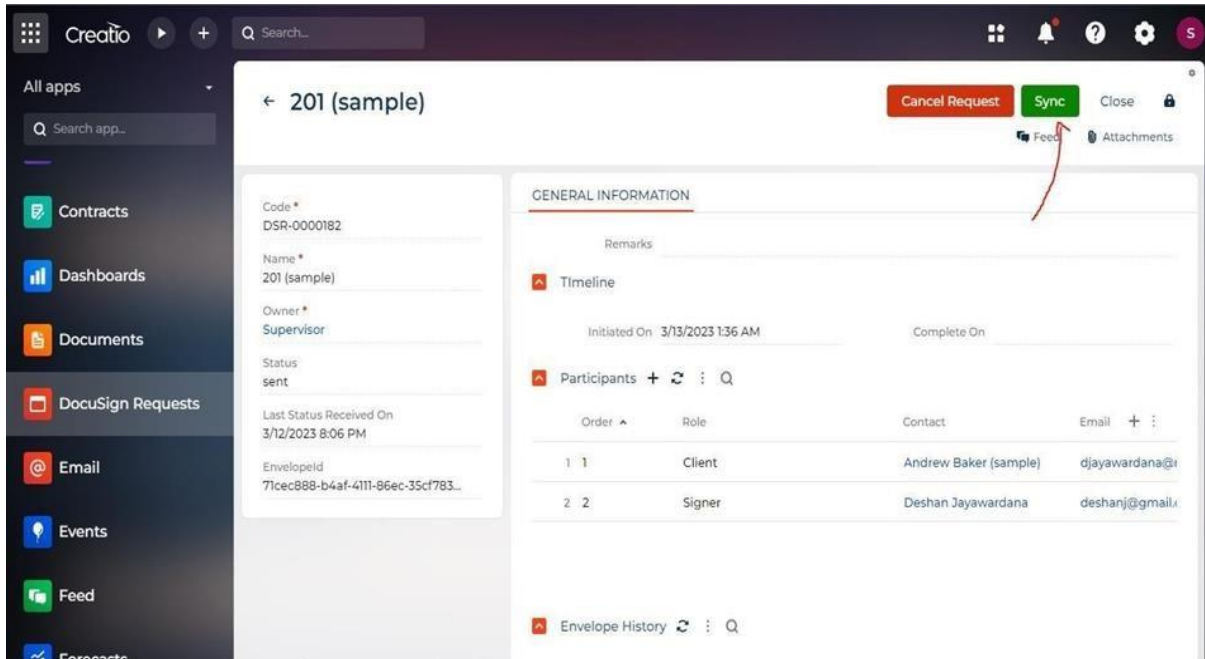
- For this, you need to go to the “Attachments and Notes” tab of the Opportunity or Contract record. Then you need to select the attachment you need to attach to your DocuSign Request Envelope.



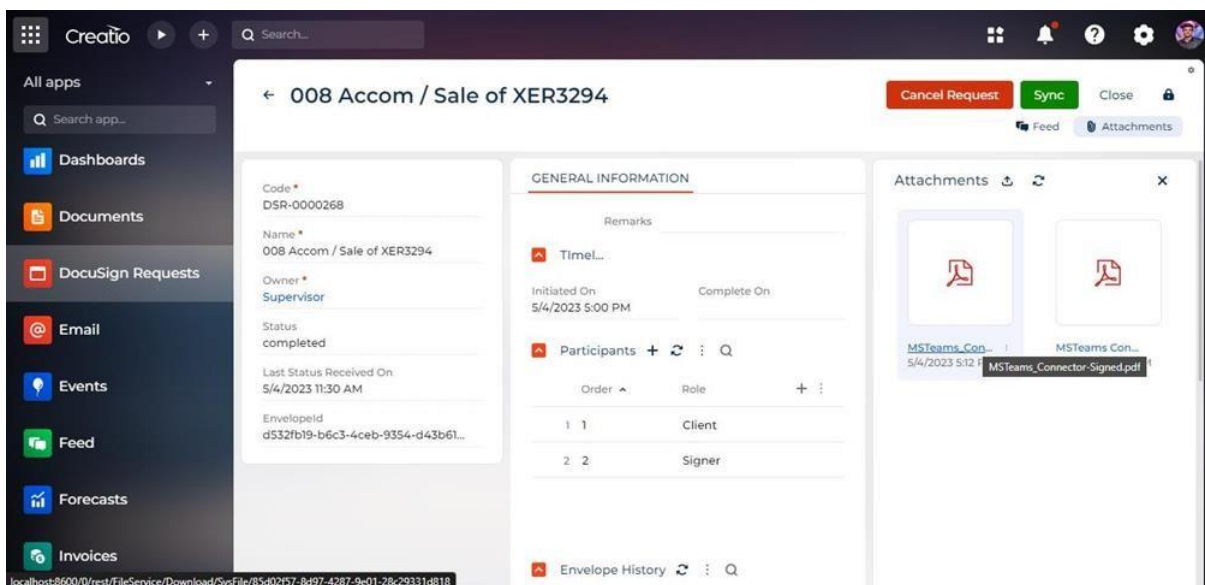
- Then you need to click on the “Send to DocuSign” Blue Button (when hovered – which is just above the Attachments detail), which will create a request as same as the previous method. Then you will be redirected to the DocuSign Creation page to specify the settings of the envelope as in the previous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



- 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.



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.

The screenshot shows the DocuSign interface for a request titled "201 (sample)". The interface includes a sidebar with fields for Code, Name, Owner, Status, and Envelope ID. The main area displays "GENERAL INFORMATION" with a Timeline section showing the request was initiated on 3/13/2023 1:36 AM. Below the timeline is a table of participants.

Order	Role	Contact	Email
1	Client	Andrew Baker (sample)	djayawardana@mitral.com
2	Signer	Deshan Jayawardana	deshanj@gmail.com

The "Cancel Request" button is highlighted with a red arrow, indicating the action to be taken to cancel the request.

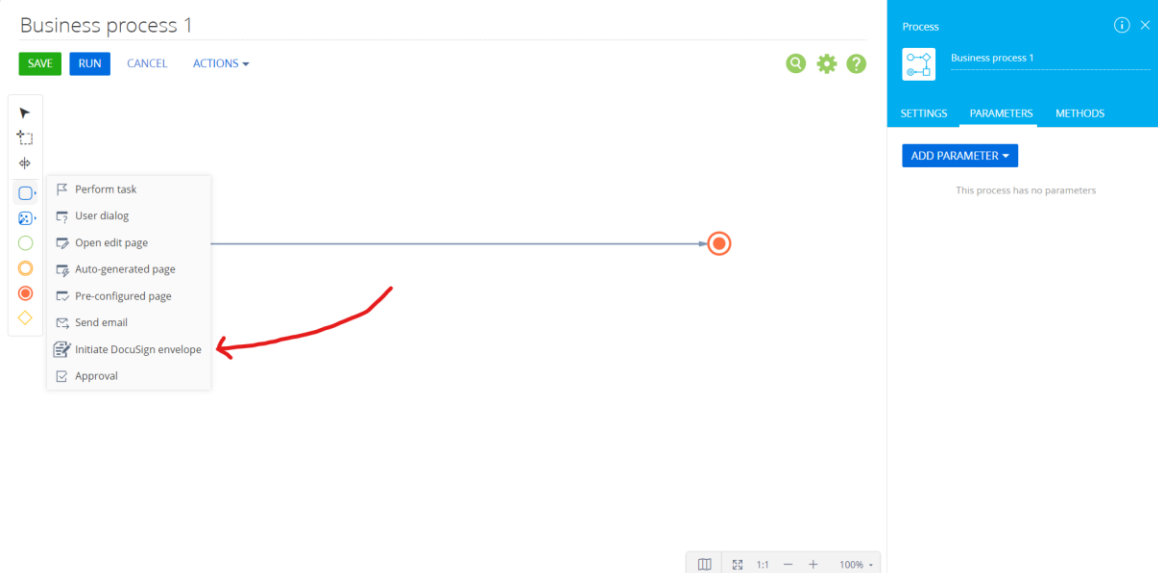
DocuSign Business Process Element

- We can use this custom element within any Business process and send a notification to any system user mentioning that he/she needs to send the DocuSign request. Also, this will automatically create a request in the system. And by clicking on the notification, the user can navigate to the envelope configuration page.

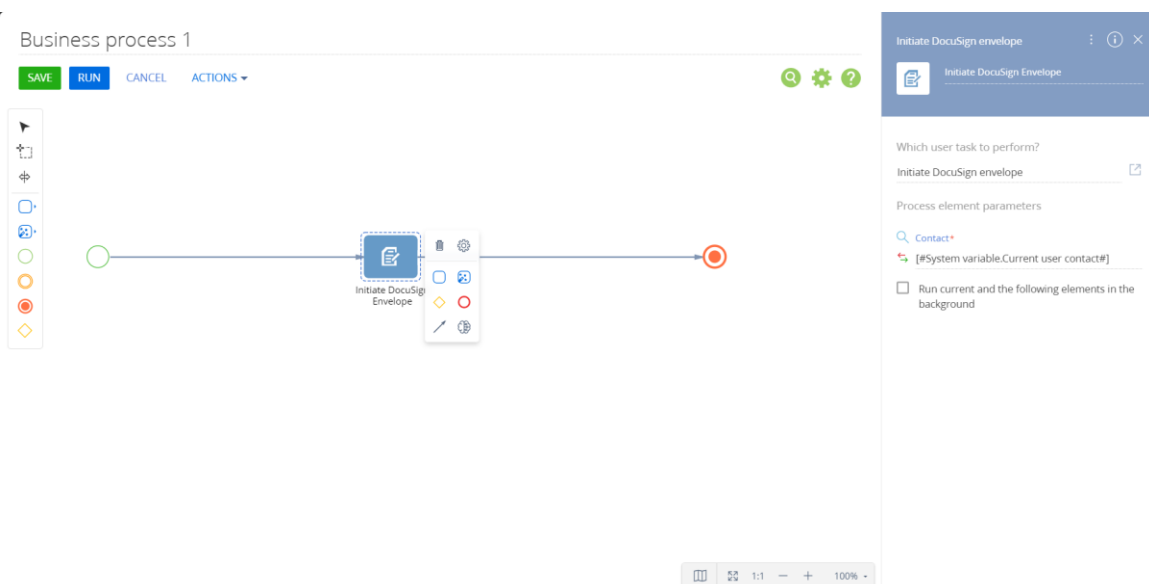
Using the DocuSign Business Process Element

Once the DocuSign Connector is set up, you can easily incorporate it into your business processes. Here's how:

- Drag the DocuSign Connector element into your business process diagram.



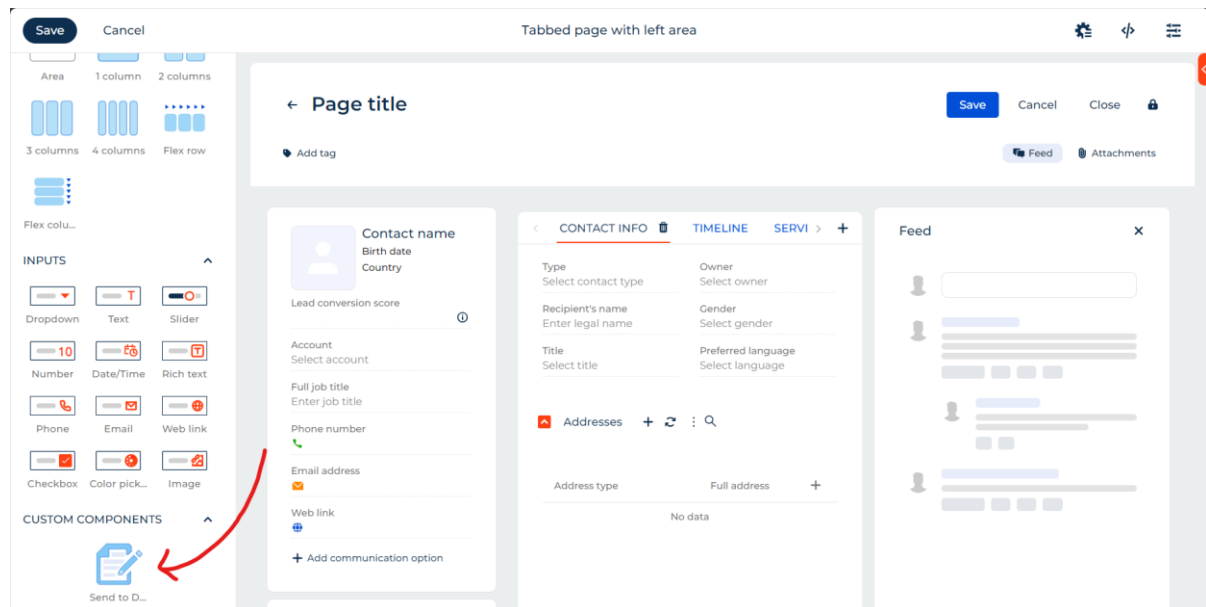
- Configure the connector by specifying the recipient.



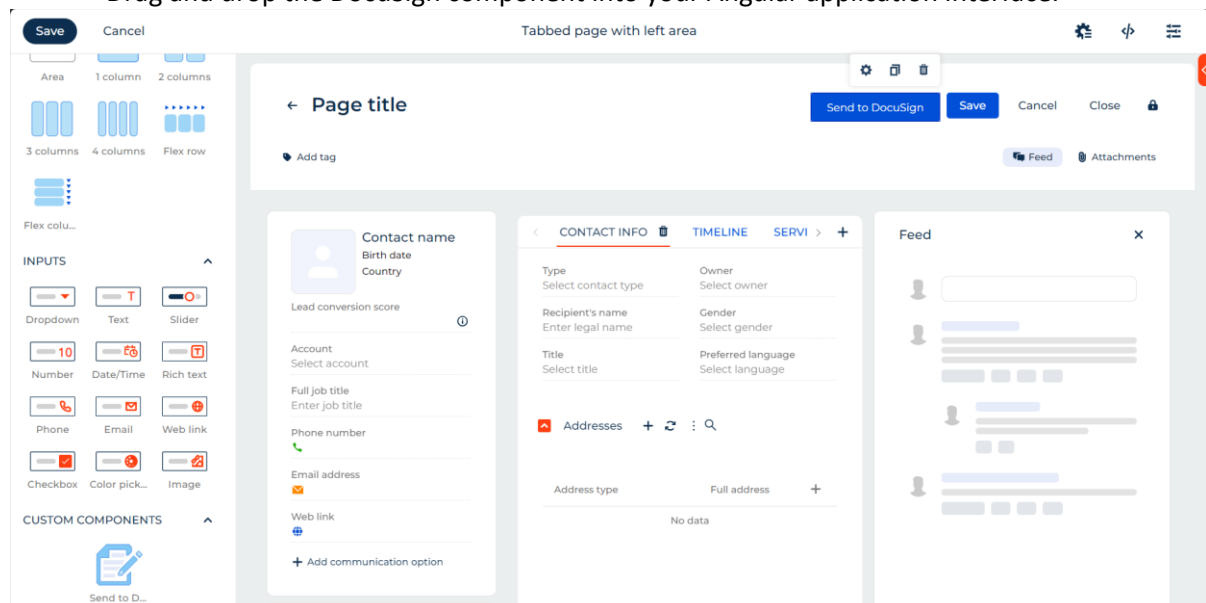
- Link the connector with other elements in your business process as needed.
- Save your changes to activate the DocuSign functionality within your process.

DocuSign Custom Element

Using the Custom Element



- Go to the Page that you want to add the Send to DocuSign element.
- Go to the Page Designer.
- Drag and drop the DocuSign component into your Angular application interface.



- Save the page and Refresh.
- Trigger the component by clicking on the 'Send to DocuSign' Button.
- After that, clicking It will create a DocuSign request record and Redirect you to the DocuSign Creation Page.

- 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.

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***END**