



CONFERO

ADMIN MANUAL

 **docuSign™ Connector**

Digital Document Signing

Version 1.0 Freedom UI

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Introduction

Docusign Connector is a native add-on that enables users to digitally sign documents through seamless integration between Creatio and Docusign.

The functionality is provided as a Creatio application in a .zip archive containing several interdependent Creatio packages. All packages must be installed together as part of a single application.

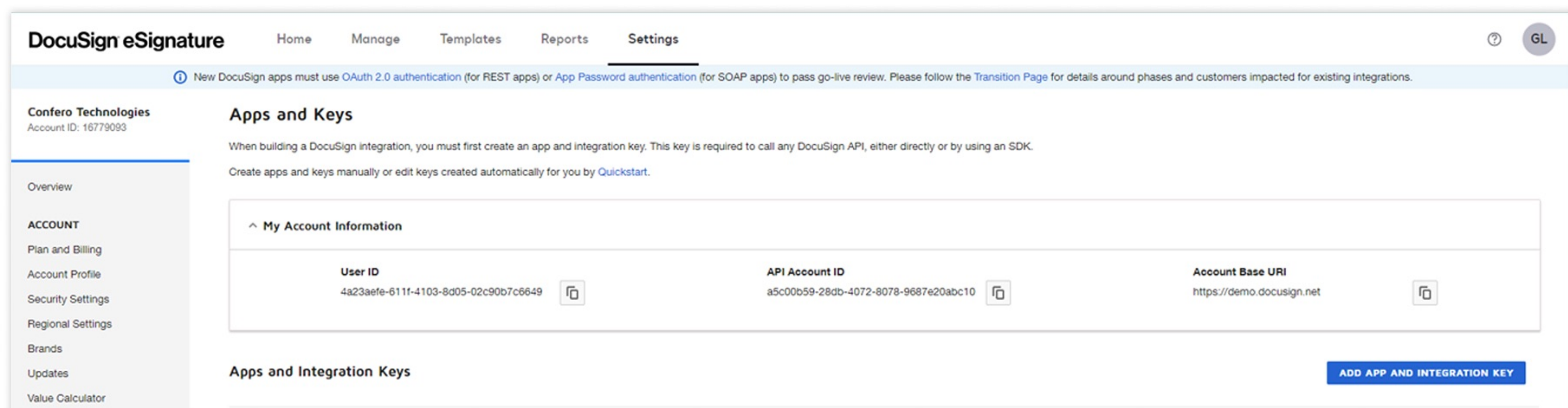
Installation is performed via System Designer → Applications Hub → New application.

To enable the integration, configure the required Docusign connection settings, authentication parameters, and signing options. Administrators can also configure e-mail templates and signing routing settings used during the document signing process.

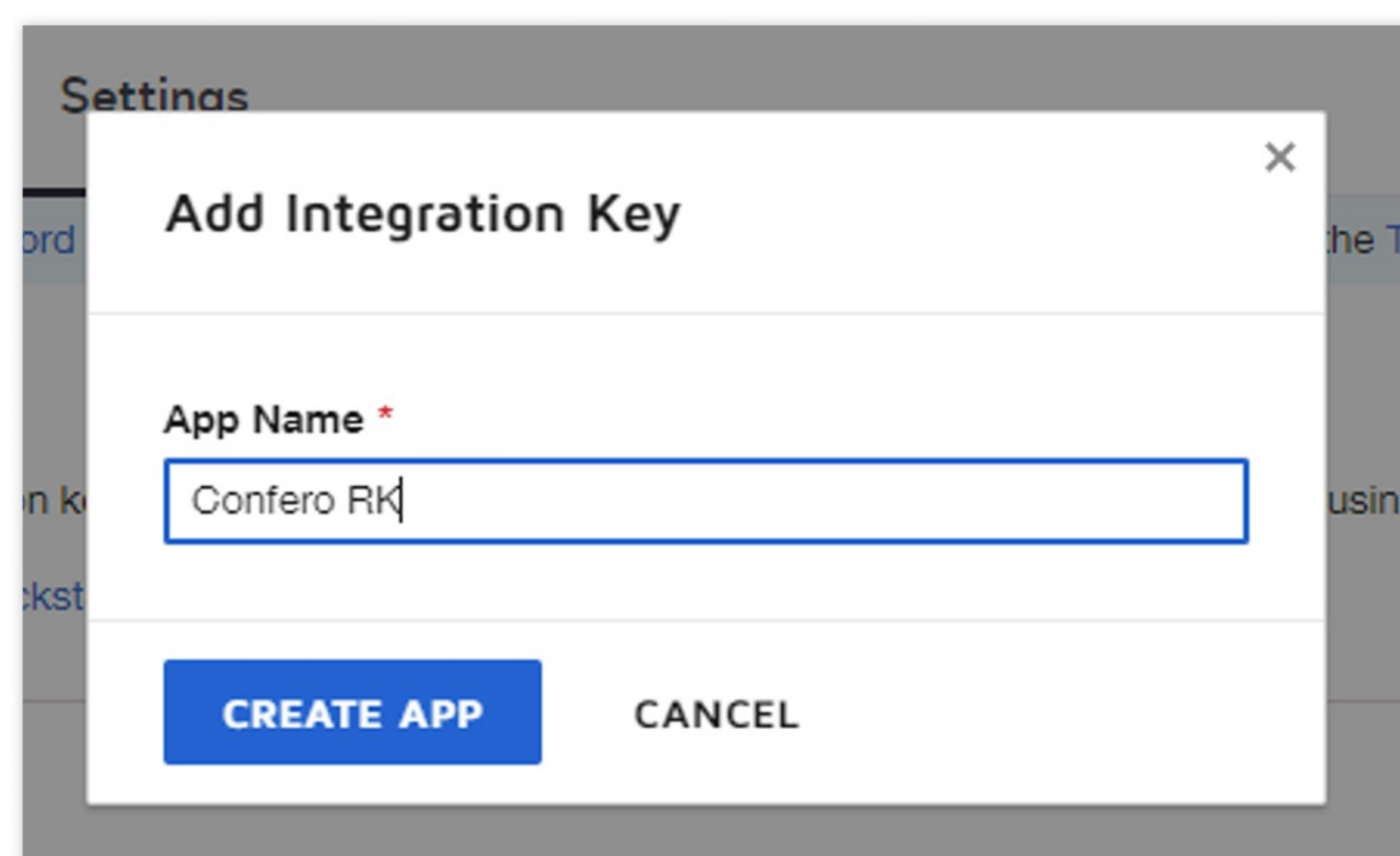
Detailed descriptions of the installation procedure, system settings, and integration configuration are provided in this **admin manual**.

Setup at docusign.com

1. Log in to Docusign <https://developers.docusign.com/>
2. Create application and integration key **ADD APP AND INTEGRATION KEY**



3. Specify application name:



4. In the Service Integration block you need to generate keys - click **GENERATE RSA**

DocuSign eSignature Home Manage Templates Reports **Settings**

Confero Technologies
Account ID: 16779093

Apps and Keys > Confero App

Confero App
Edit your application name, choose an authentication method, and configure additional settings.

General Info

App Name *
Confero App

Integration Key
c1f1f484-c945-46b6-ab21-9f01a1ce0ee8

Authentication
Not sure which settings to use? [Learn more](#)

User Application
☒ Authorization Code Grant
☐ Implicit Grant

Secret Keys
[+ ADD SECRET KEY](#)

Service Integration
DocuSign can generate a keypair for you or you can upload your own public key.

RSA Keypairs (ID)

[+ GENERATE RSA](#) [+ UPLOAD RSA](#)

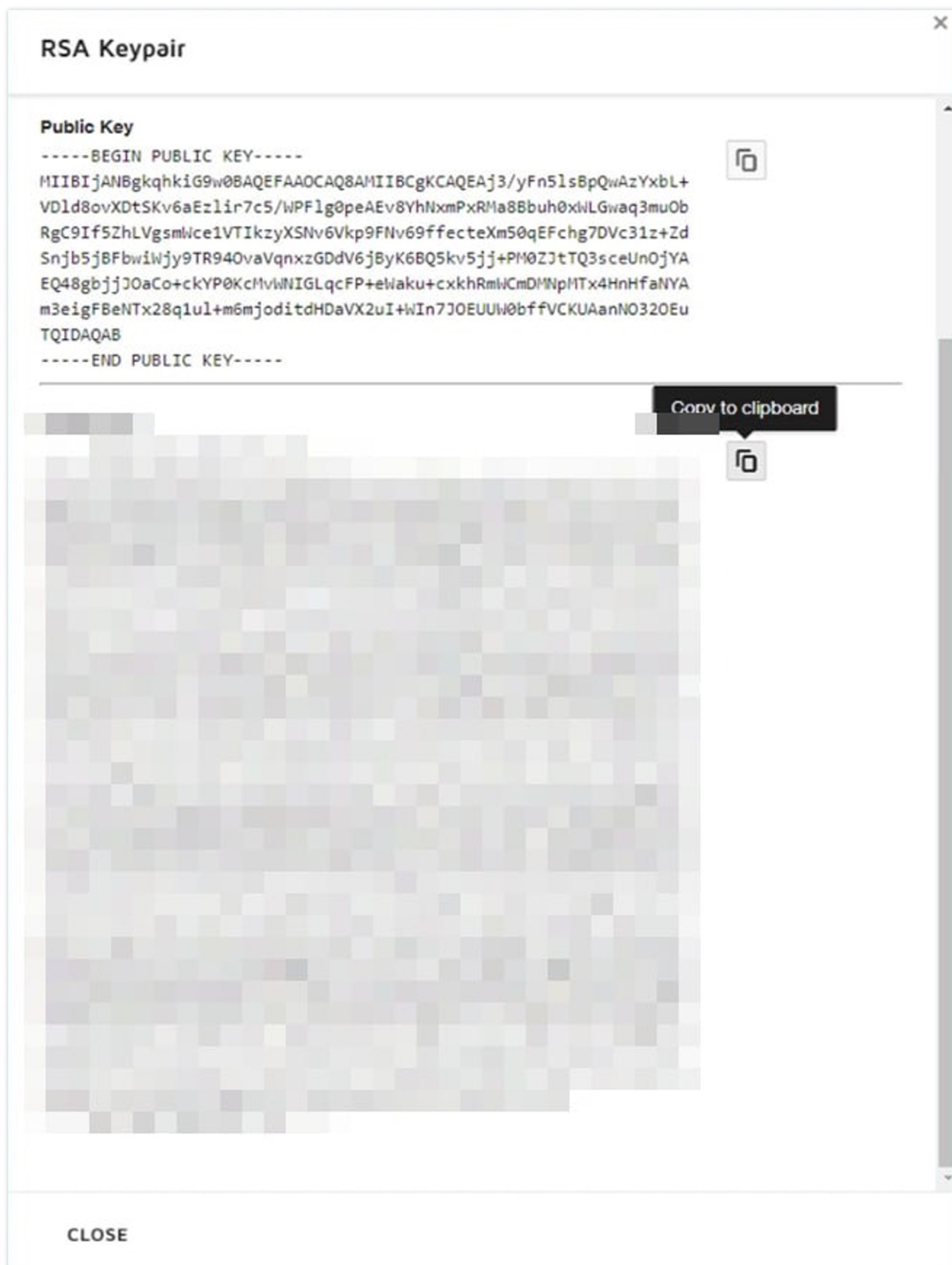
Overview

ACCOUNT
Plan and Billing
Account Profile
Security Settings
Regional Settings
Brands
Updates
Value Calculator

USERS AND GROUPS
Users
Permission Profiles
Groups
Signing Groups

SIGNING AND SENDING
Signing Settings
Sending Settings
Identity Verification
Email Preferences
Custody Transfer
Document Retention
Legal Disclosure
Reminders and Expiration
Comments

5. Copy Private Key and save as *.txt.



7. Save the key setting

USERS AND GROUPS

Users

Permission Profiles

Groups

Signing Groups

SIGNING AND SENDING

Signing Settings

Sending Settings

Identity Verification

Email Preferences

Custody Transfer

Document Retention

Legal Disclosure

Reminders and Expiration

Comments

Document Custom Fields

Envelope Custom Fields

INTEGRATIONS

Connect

Apps and Keys

API Usage Center

Payments

AGREEMENT ACTIONS

Rules

Connections

AUDITING

Audit Logs

Bulk Actions

Authentication

Not sure which settings to use?[Learn more](#)



User Application

☒ Authorization Code Grant

☐ Implicit Grant

Secret Keys

+ ADD SECRET KEY



Service Integration

DocuSign can generate a keypair for you or you can upload your own public key.

RSA Keypairs (ID)

X 7843055e-6eb4-4c1f-ab8a-c326eeaa4df7

+ GENERATE RSA

+ UPLOAD RSA

Additional settings

Redirect URIs

+ ADD URI

Link to Privacy Policy

http://www.example.com/privacy

Link to Terms of Use

http://www.example.com/terms

SAVE

CANCEL

8. This will generate an application and a key under **Apps and Integration Keys**

Apps and Keys

When building a DocuSign integration, you must first create an app and integration key. This key is required to call any DocuSign API, either directly or by using an SDK.

Create apps and keys manually or edit keys created automatically for you by [Quickstart](#).

^ My Account Information

User ID	API Account ID	Account Base URI
4a23aefe-611f-4103-8d05-02c90b7c6649	a5c00b59-28db-4072-8078-9687e20abc10	https://demo.docusign.net
		

Apps and Integration Keys

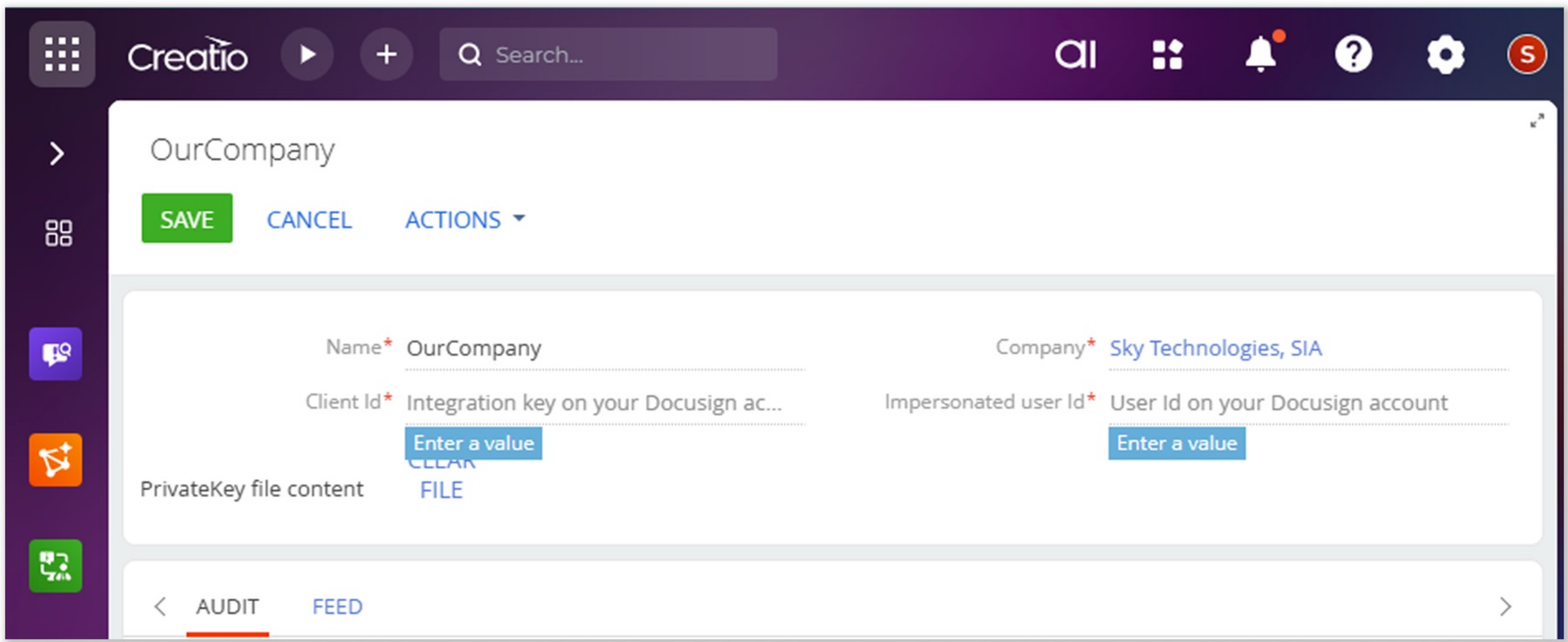
ADD APP AND INTEGRATION KEY

App Name ▲	Integration Key ▼	Environment	Go Live Status	
Confero App	c1f1f484-c945-46b6-ab21-9f01a1ce0ee8	Development	Submit for review	ACTIONS ▼
Confero RK	f4d44075-9cd0-41ed-84f6-a37d38b743e1	Development	Not started Make 20 successful API calls	ACTIONS ▼

Setup at Creatio

Lookup Docusign company setting

The Creatio system has developed a separate Docusign company setting lookup where integration settings are stored. To create a setting, click on [NEW SETTING](#)



- Client Id – value from the Integration Key field in the Apps and Integration Keys block

Apps and Integration Keys

App Name ▲	Integration Key ⇅
Confero App	c1f1f484-c945-46b6-ab21-9f01a1ce0ee8

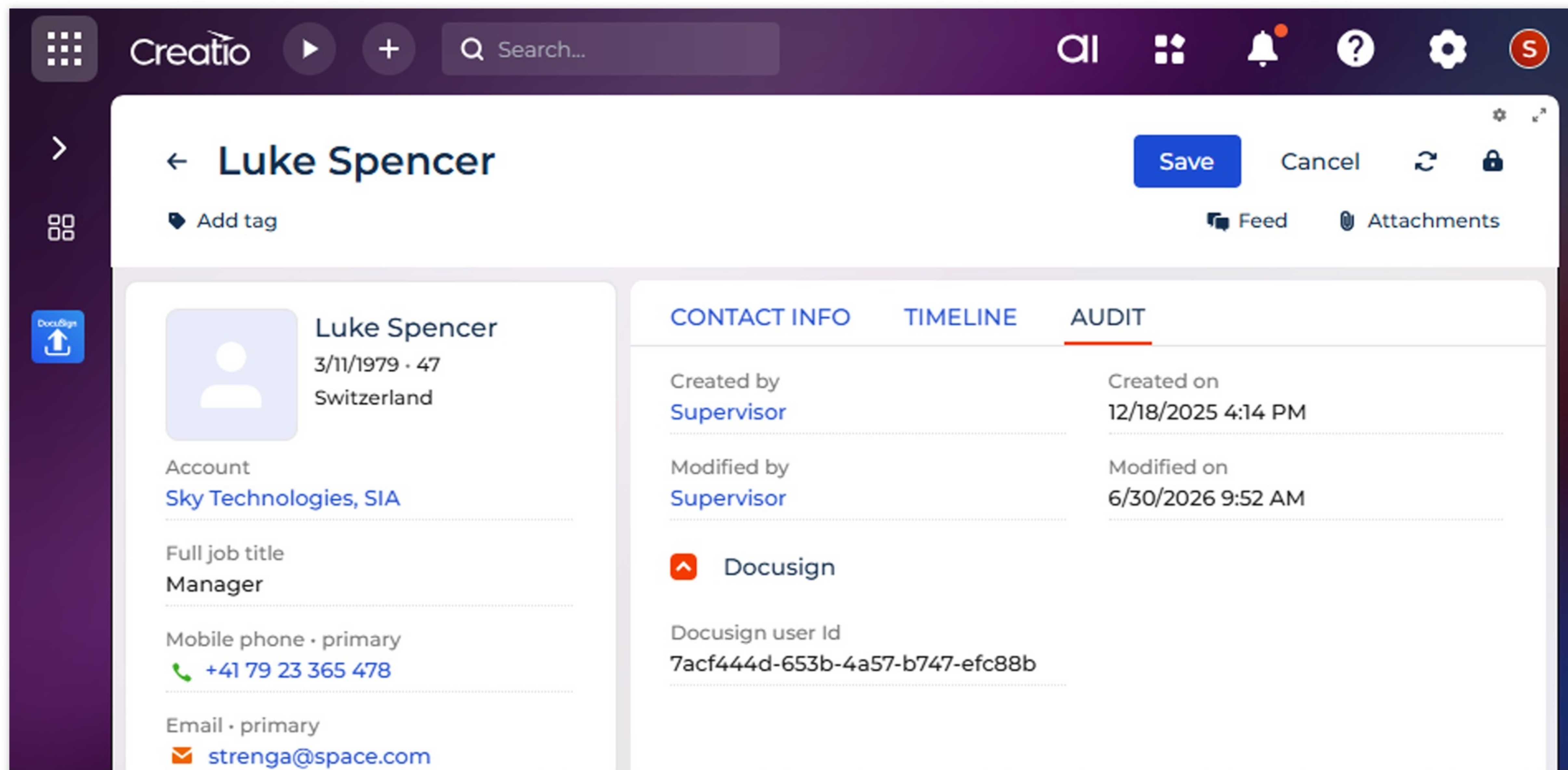
- Company – value from the lookup Accounts
- Private key – click **SELECT FILE** and attach the file in which the private key is saved.
- Impersonated user ID – one of User's ID.
- User IDs – this is the UserID specified in the user's profile.

User Profile

PROFILE	SHARED ACCESS
Email	User ID
test@confero.tech	c9c8557d-1d44-4c4d-aa26-a2dfc47e433f

Creatio contact setting

In the contact card in Creatio, you can specify the User ID from the profile in Docusign. If a user initiates a Docusign operation and their contact record does not contain a value in the Docusign User ID field, Creatio automatically uses the identifier specified in the Impersonated user field to authenticate the request



Docusign contact setting

All newly added users in Docusign must complete the consent process.

1. Open your browser and enter the URL below:

`https://<basepath>/oauth/auth?response_type=code&scope=signature%20impersonation&client_id=<INTEGRATIONKEY>&redirect_uri=<Redirect URL>`

Basepath:

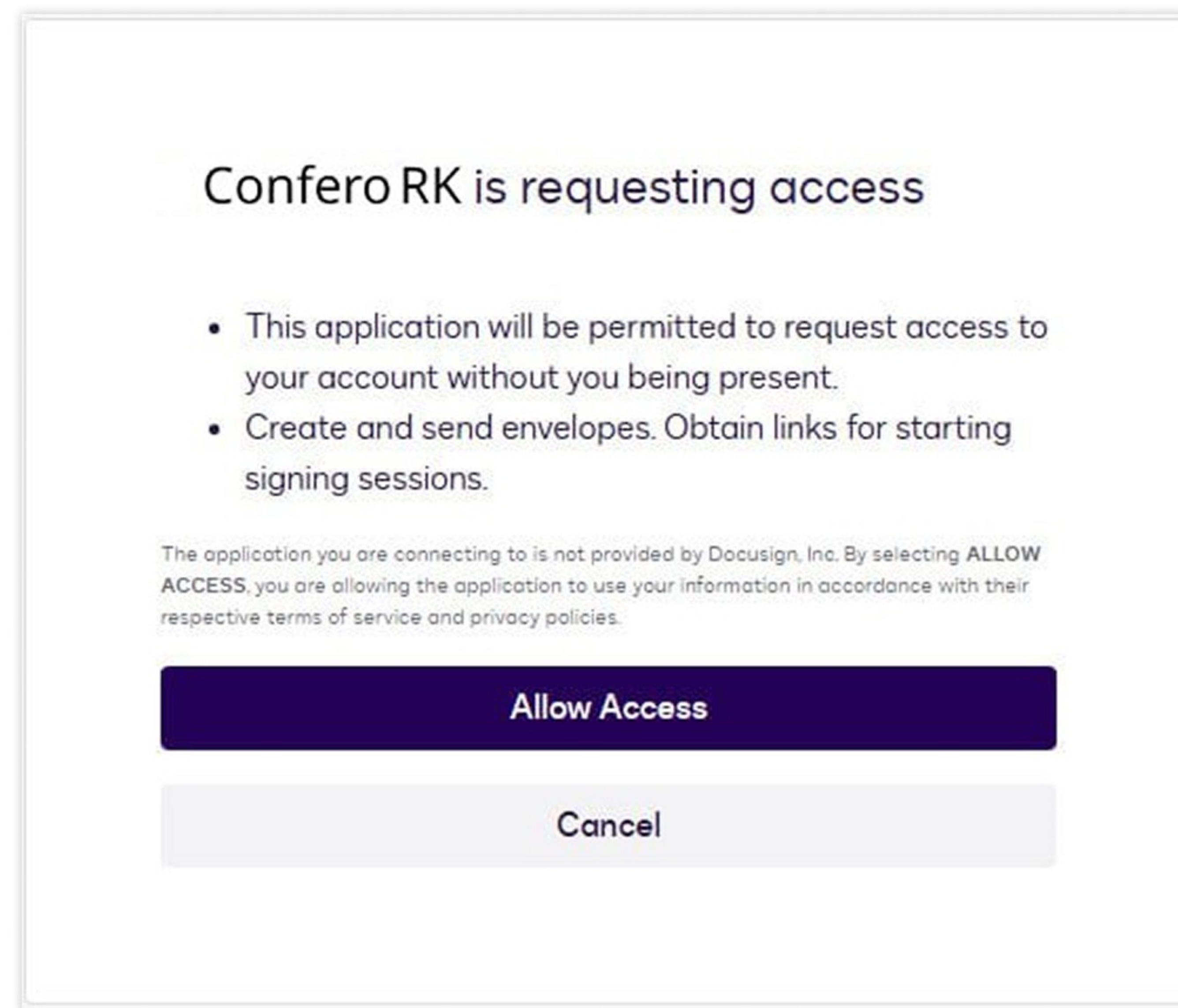
(Developer Account)- `https://account-d.docusign.com`

(Regular Account)- `https://account.docusign.com`

Example:

`https://account-d.docusign.com/oauth/auth?response_type=code&scope=signatureimpersonation&client_id=7acf444d-653b-4a37-b747-efc88b13629e&redirect_uri=https://mycreatio.com`

2. After opening the URL, sign in with your DocuSign credentials and select **'Allow Access'**.



The actions described in this section must be repeated for each new user.

System settings and lookups

Docusign request section lookups

The system has developed several basic customisable lookups, which are used when filling in the document:

Lookup	Description
Docusign role	Signer Receives a copy
Docusign company setting	OurCompany
Docusign email templates	Default
DocuSing envelope status	Delivered Declined Sent Completed Voided Template Created Signed Deleted Processing
Docusign request status	Completed Draft Canceled Sent

System settings of the Docusign request section

The System Setup Settings page is used to register or change the value of a system setting. This section is available to system administrators.

To access the section, open the system designer by clicking the button  in the upper right corner of the application. In the System setup section, click on the System settings link.

The system has developed several system settings that are used when filling out a document in 'Record keeping' Creatio. The settings for 'Record keeping' Creatio are separately placed in the Docusign folder.

Setting	Description	Code
Docusign authentication server	For the developer environment, the base URI is https://account-d.docusign.com/oauth/auth For the production environment the base URI: https://account.docusign.com/oauth/auth	CfTcDocuSignAuthenticationServer
Docusign documents server Url	For developer environment Docusign documents server URL - https://appdemo.docusign.com/documents/details/ For production environment: see what URL the document has on the control panel and the URL from there. https://appdemo.docusign.com/documents/details	CfTcDocuSignDocumentsServerUrl
Docusign request code mask	Default value DSR_{0:0000000}	CfTcDocuSignRequestCodeMask
Docusign request last number	Integer Default value	CfTcDocuSignRequestLastNumber
Docusign service Api Url	https://demo.docusign.net/restapi # development https://www.docusign.net/restapi # production	CfTcDocuSignServiceApiUrl



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that powers

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