



CONFERO

USER 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.

Docusign Connector allows users to initiate document signing requests directly from Creatio, monitor the signing process, and automatically synchronise completed signed documents with related records. The integration streamlines document approval workflows while ensuring document authenticity, integrity, and secure storage.

The integration with Docusign enables:

- Initiating document signature requests directly from Creatio.
- Tracking the status of signing requests throughout the signing process.
- Automatically saving completed signed documents to Creatio.
- Configuring parallel, sequential, or hybrid signing workflows.
- Customising e-mail templates used during the signing process.

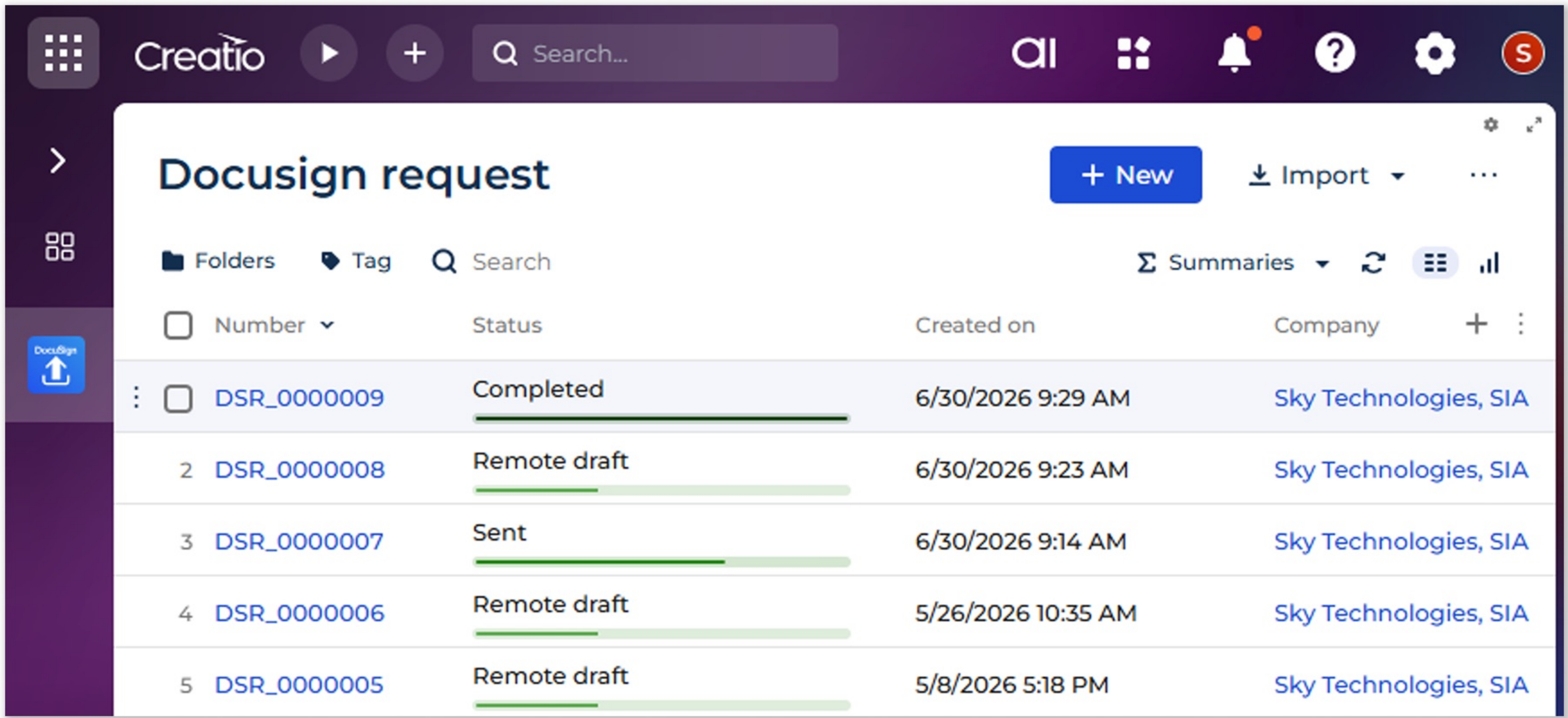
Detailed instructions for creating and managing Docusign signature requests are provided in this **user manual**.

Docusign requests

The **Docusign Requests** section allows you to upload, send for signing, view, sign, and track the status of documents in the Docusign service.

The section has a standard structure that does not change from the base version.

The standard appearance of the section register is shown below:



You can initiate the creation of a Docusign Request card from the Docusign Requests section. Click on the button **+ New**

The document card consists of a set of general data fields as well as several tabs. The permissions are defined according to the access rights matrix

Description of fields in the card

A list and description of the fields is given below:

Profile Fields	
Field	Description
Number	Full document number Formed automatically by the system according to the mask when first saved Not editable
Message template*	Template for filling in required information when sending for signature Docusign email templates

Profile Fields

Field	Description
Created on	Filled in automatically when creating a request Not editable

Tab GENERAL

Field	Description
Link	Filled in automatically Not editable
Reason for cancellation	Filled in automatically when cancelling / refusing to sign the document Not editable
Docusign participant	Docusign participant (detail) It is possible to add a participant whose signature is to be obtained Adding is only possible on Draft status
Signer email subject*	Filled in automatically after selecting the message template Editable field
CC email subject*	Filled in automatically after selecting the message template Editable field
Signer email body*	Filled in automatically after selecting the message template Editable field
CC email body*	Filled in automatically after selecting the message template Editable field

Tab NOTES

Field	Description
Notes	Text field

Tab AUDIT

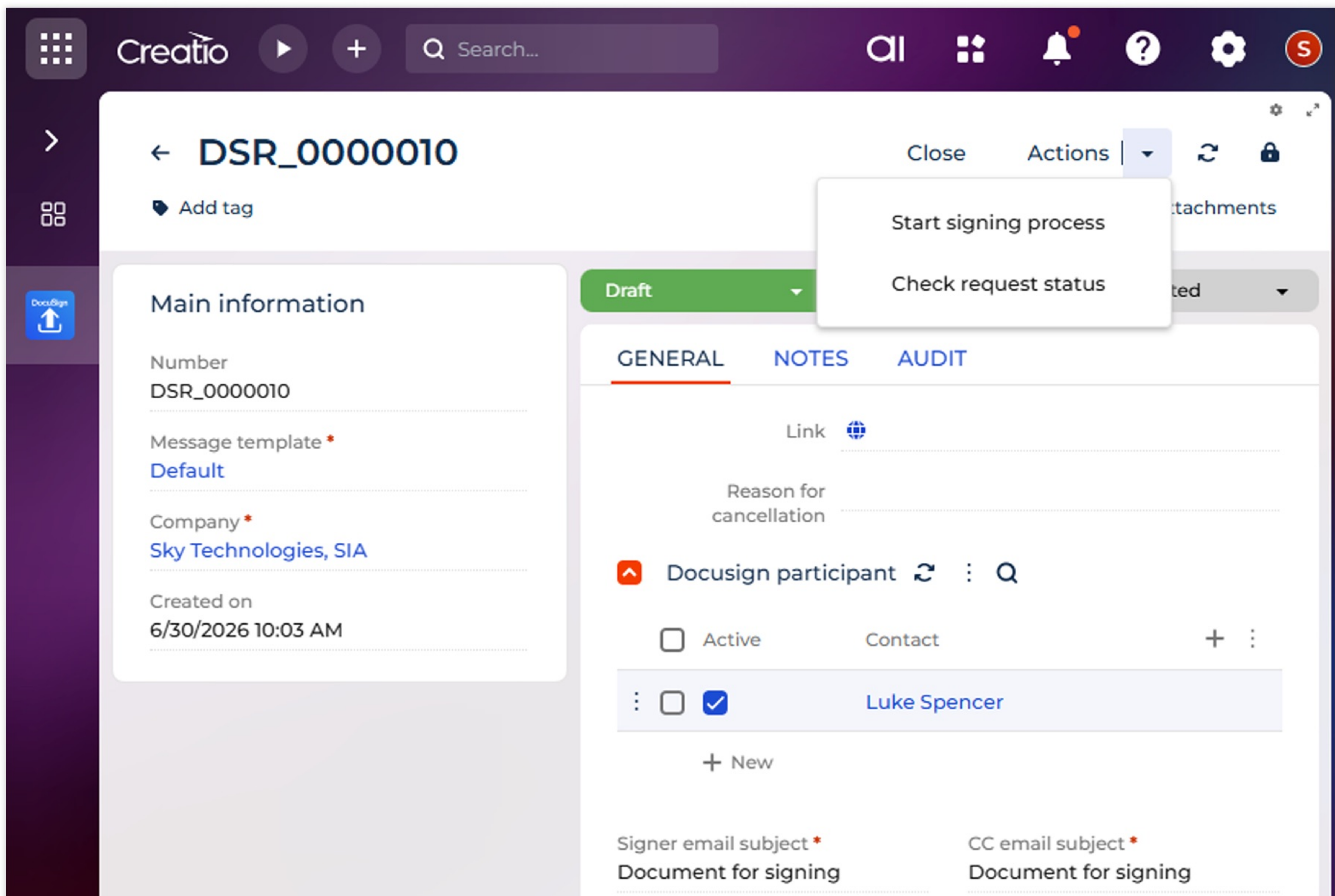
Field	Description
Created by	Value from table Employee Author of the entry Generated by the system automatically upon initially saving the document Read only
Created on	Date and time of creation Generated by the system automatically upon initially saving the document Read only

Tab AUDIT

Field	Description
Modified by	Value from table Employee Last person who modified the entry Generated by the system automatically each time upon saving the document Read only
Modified on	Date and time the entry was last modified Generated by the system automatically each time upon saving the document Read only

The process of signing documents in Docusign

- Create a new request
- Fill out all required fields on the form
- On the Docusign participants details add persons, specifying their order number in the signing process and roles
- Click **Actions** → **Start signing process**



- The status of the document will automatically change from **Draft** to **Sent**
- The signer will receive a link to the document in the docusign service
- Sign the document using docusign tools

- If more than one signer is specified, they will receive a link to the document, following the sequence number specified in Creatio.
- After all participants have signed in the docusign environment, the status in the Docusign Request card automatically changes from **Sent** to **Completed**.
- The file with the collected signatures is automatically added to the **Attachments details**

Available functions in the Docusign request card

The following actions can be performed with the ACTIONS button (depending on the user's access rights):

- **Follow the feed** – possibility to follow / not to follow the feed in the document card
- **Start signing process** – the ability to run the signing process in Docusign
- **Check request status** – the ability to update the status of the signing process in Docusign participants details



CONFERO

Expertise
that powers

Confero Technologies, SIA

Reg. number: 40203176720

+371 67775111

info@confero.tech

Elizabetes Street 23, Riga, LV-1010, Latvia