

e✓rotrust

Connector for Creatio

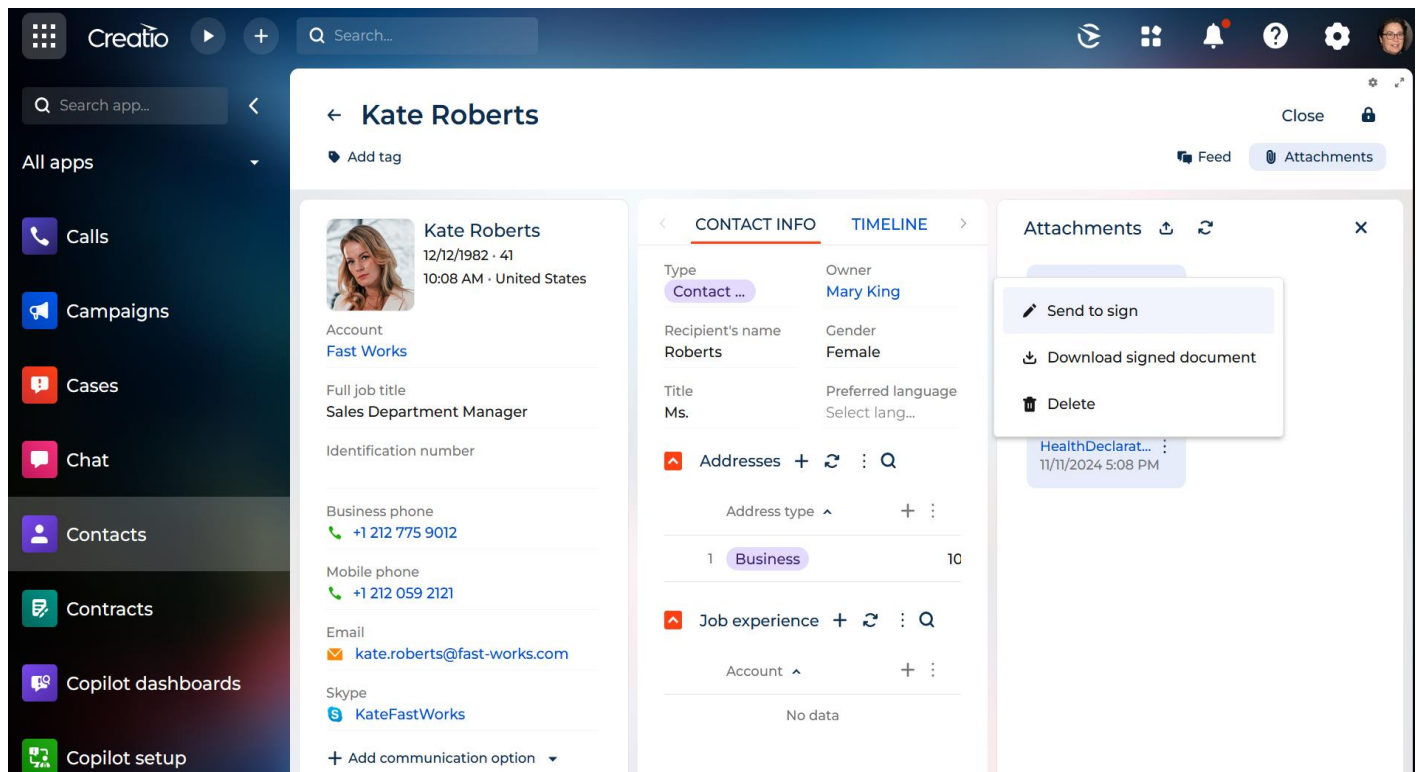
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# Evrotrust Connector overview

This connector streamlines the integration between an employee's Evrotrust account and all of the sections which have [Attachment] detail within Creatio. It facilitates seamless coordination by allowing users to initiate, manage, and track the entire e-signature process. With this integration, businesses can automate document signing workflows, ensuring more efficient collaboration and real-time visibility of the status of critical agreements and contracts.



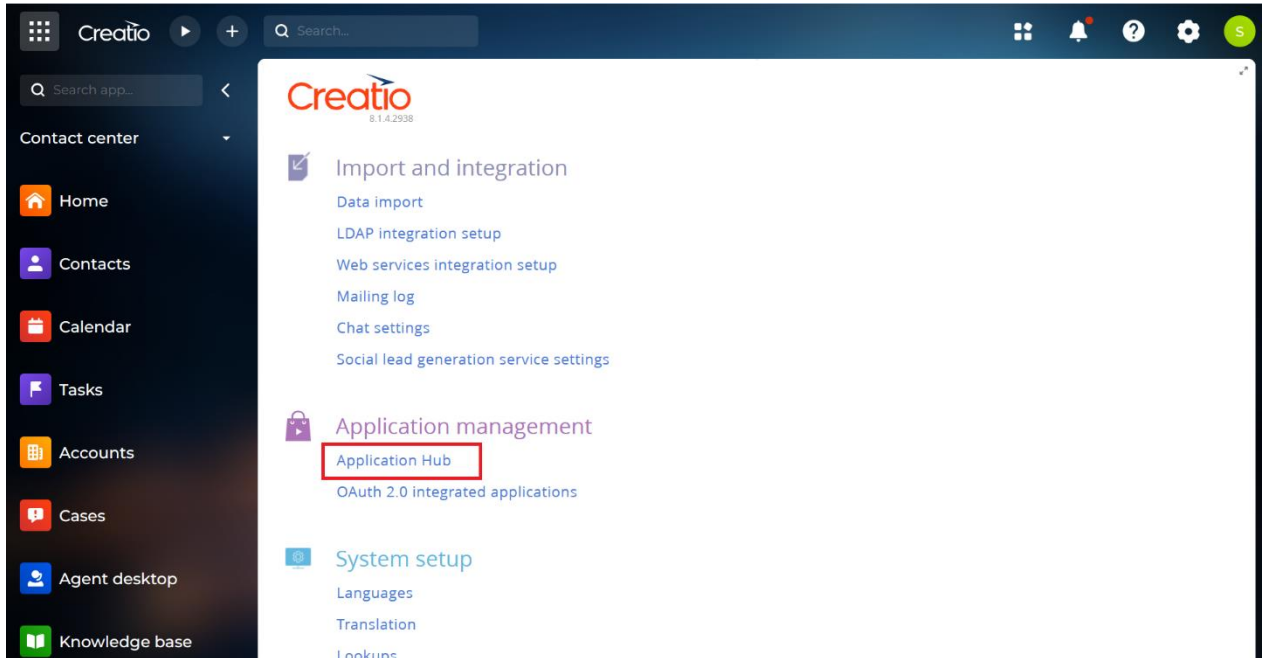
The screenshot displays the Creatio user interface. On the left is a sidebar with navigation icons and labels: Calls, Campaigns, Cases, Chat, Contacts, Contracts, Copilot dashboards, and Copilot setup. The main area shows the profile of 'Kate Roberts', including her photo, account details (12/12/1982, 41, 10:08 AM, United States), job title (Sales Department Manager), and contact information (Business phone: +1 212 775 9012, Mobile phone: +1 212 059 2121, Email: kate.roberts@fast-works.com, Skype: KateFastWorks). The 'CONTACT INFO' tab is active, showing details like Type (Contact ...), Owner (Mary King), Recipient's name (Roberts), Gender (Female), Title (Ms.), and Preferred language (Select lang...). Below this are sections for 'Addresses' and 'Job experience'. On the right, the 'Attachments' tab is active, showing a list of documents. A context menu is open over the attachments, displaying options: 'Send to sign', 'Download signed document', and 'Delete'. A specific attachment 'HealthDeclarat...' is visible with a timestamp of 11/11/2024 5:08 PM.



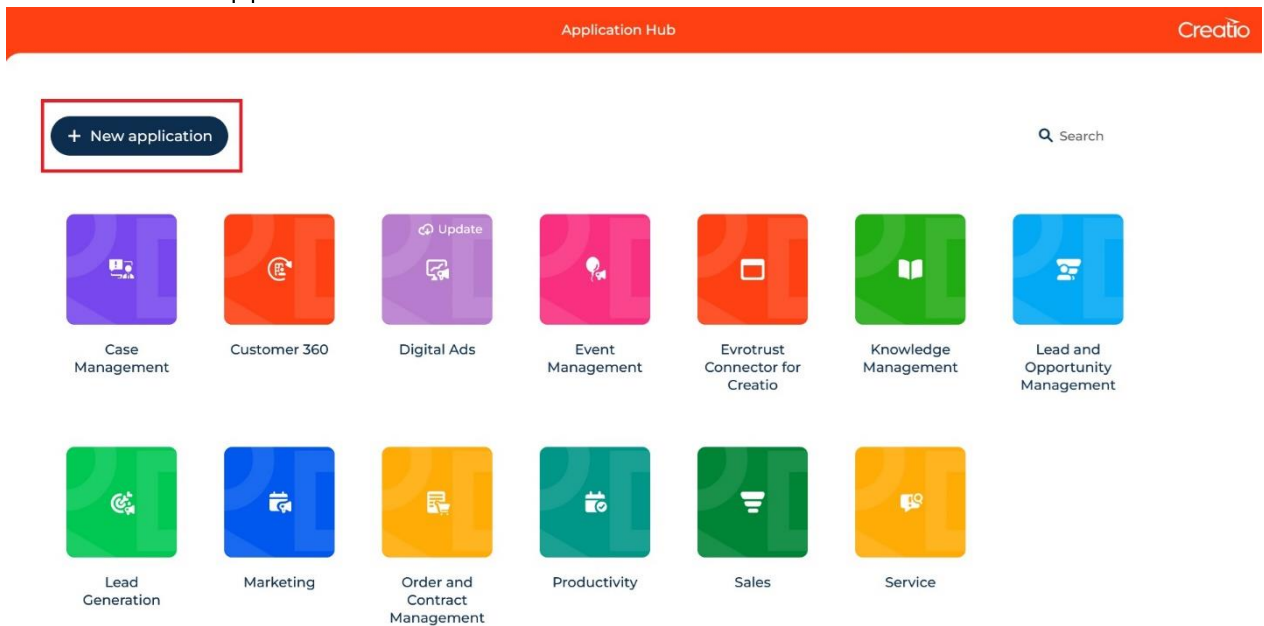
# Configuration Guide

Follow these steps to set up the connector in your instance:

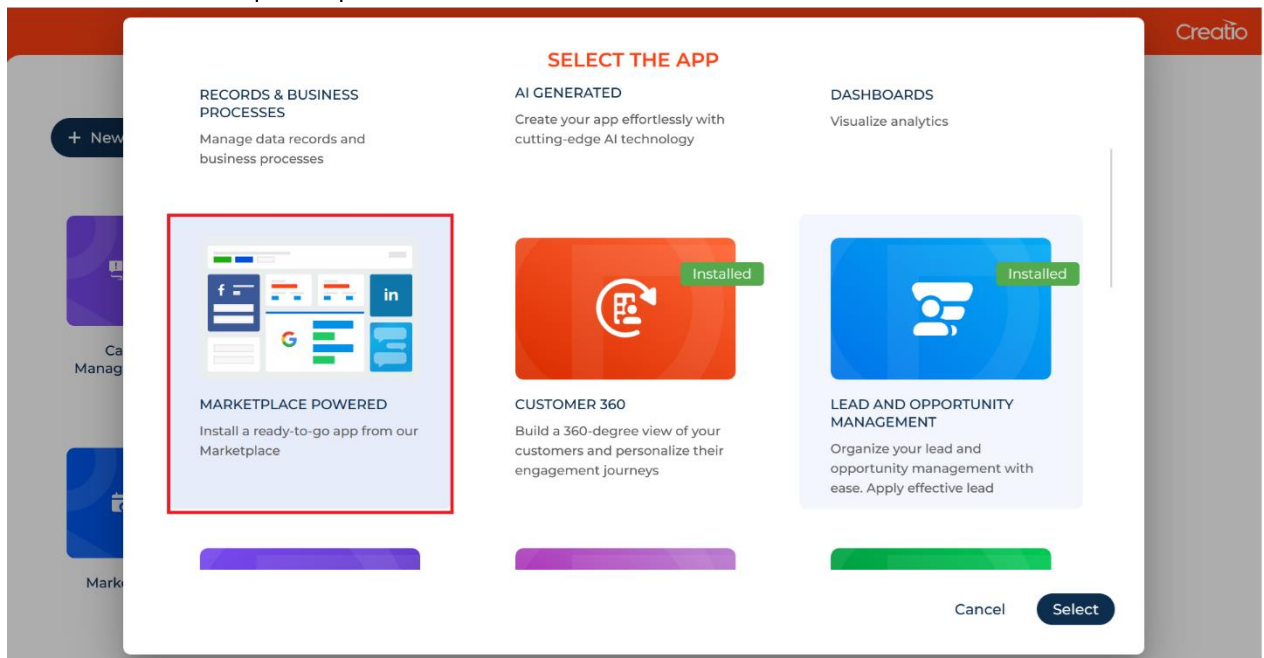
1. Go to Settings-> Application Management-> Application Hub



2. Click on "New application"



3. Click On “Marketplace powered”



4. Search “Evrotrust Connector for Creatio” and Click “Install”



# Evrotrust system settings

In order to configure the Evrotrust integration, the system administrator has to set up the integration's system settings.

To do this:

1. Open the [System settings] section;
2. Go to the [System Designer]
3. Select [Evrotrust integration] folder

## System settings

NEW FOLDER ▾ ADD SETTING ACTIONS ▾ VIEW ▾

×

Filters/folders ▾

Evrotrust integration ×

Name	Code
Evrotrust domain	TbiEvrotrustDomain
<div>OPEN COPY DELETE</div>	
Evrotrust vendor number	TbiEvrotrustVendorNumber
Evrotrust vendor API key	TbiEvrotrustVendorApiKey
Evrotrust private key	TbiEvrotrustPrivateKey
Evrotrust document expires in, hours	TbiEvrotrustDocumentExpireInXHours
Evrotrust public key	TbiEvrotrustPublicKey

+

Case registration

Configuration

Contact age

Content security

Creatio cloud services

Default values

Evrotrust integration ⭐ ⚙

External access

External users settings

Feed

File management

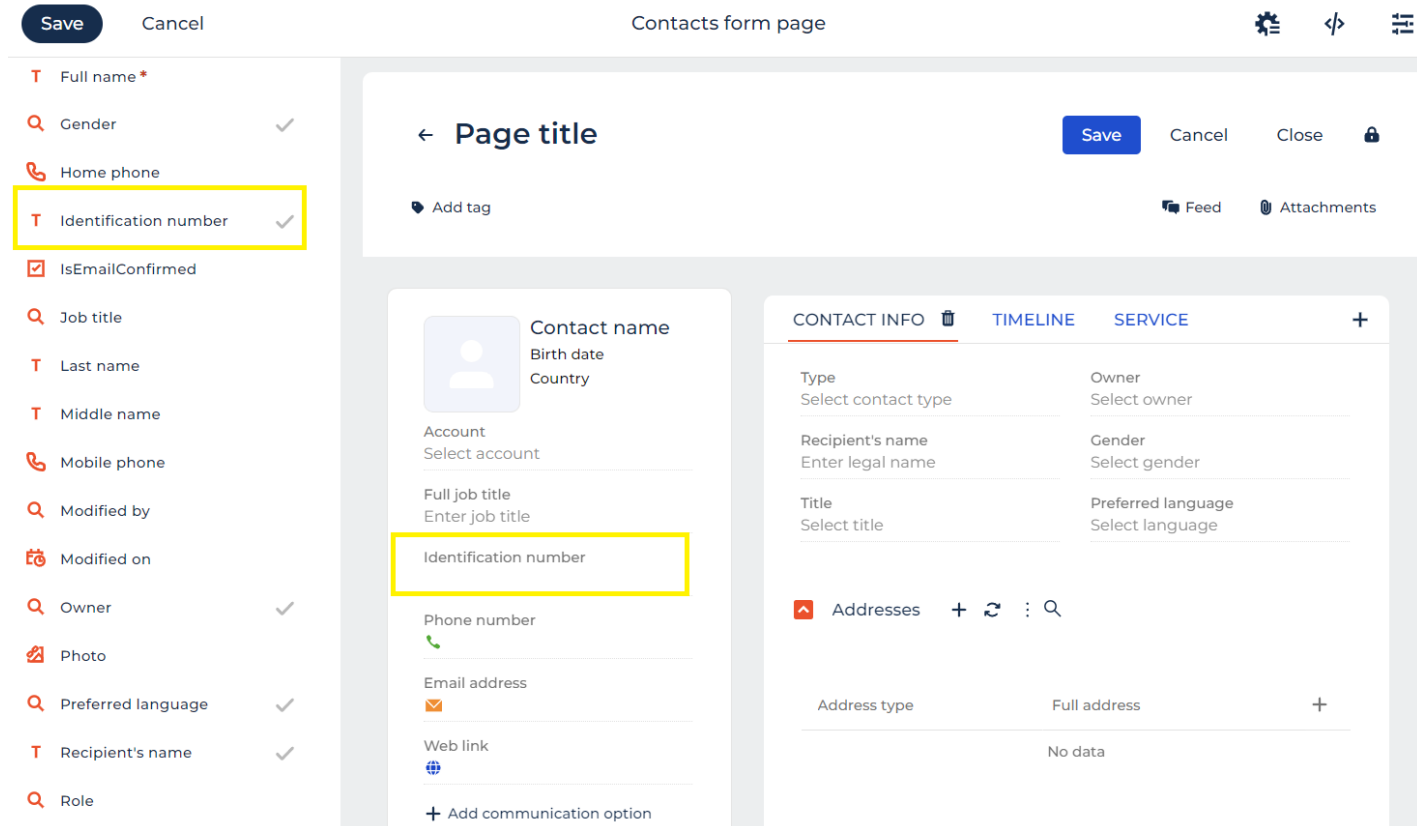
Set up the following system settings:

- **Evrotrust domain** - Evrotrust Endpoint URL. More information about this you can obtain from the [official Evrotrust documentation](#) .
- **Evrotrust vendor API key** and **Evrotrust vendor number** are provided by Evrotrust.
- **Evrotrust document expires in, hours** - the time expired and the document is no longer available for signing
- **Evrotrust public key** and **Evrotrust private key**.  
You should generate a pair of keys – private and public, standard public key RSA 2048, which are used for the asymmetric encryption of the content. The public key is sent in the request for signing a document. Private key is used for the decryption of the signed document.  
For more information and assistance contact Evrotrust [support@evrotrust.com](mailto:support@evrotrust.com)



# Setting up the Connector

1. This functionality can be used only from authorized by your company employee/s for signing a specific document or group of documents automatically.  
The authorized employee should be registered as a user on the **Evrotrust mobile application**.
2. After this, in Creatio you need to fill in Contacts data, populating **E-mail**, **Country**, **Identification number** and/or **Phone number** fields in the [Contacts] section.
3. If you are using Studio Creatio product, you will need to install the **Customer360App** application from Application Hub to have a possibility to work with Freedom UI Accounts and Contacts sections.
4. Additionally, you will need to add the Identification number field on the Contact form page (this field is already added to the Contact object). In the old Creatio interface, the field is already displayed on the Contact page. You can populate manually your Identification number.



The screenshot displays the 'Contacts form page' in the Creatio interface. On the left, a sidebar lists various fields for the contact object, including 'Full name', 'Gender', 'Home phone', 'Identification number', 'IsEmailConfirmed', 'Job title', 'Last name', 'Middle name', 'Mobile phone', 'Modified by', 'Modified on', 'Owner', 'Photo', 'Preferred language', 'Recipient's name', and 'Role'. The 'Identification number' field is highlighted with a yellow box. The main form area is titled 'Page title' and contains several sections. The 'Contact name' section includes fields for 'Birth date', 'Country', 'Account', 'Full job title', and 'Identification number', with the latter highlighted in yellow. Below this is a section for 'Phone number', 'Email address', and 'Web link'. The 'CONTACT INFO' section on the right includes fields for 'Type', 'Owner', 'Recipient's name', 'Gender', 'Title', and 'Preferred language'. At the bottom, there is an 'Addresses' section with a table for 'Address type' and 'Full address'.

Address type	Full address
	No data

