Instructions for using the application DocStudio in Creatio

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General Information

This guide describes how to set up and use the DocStudio application within the Creatio system.

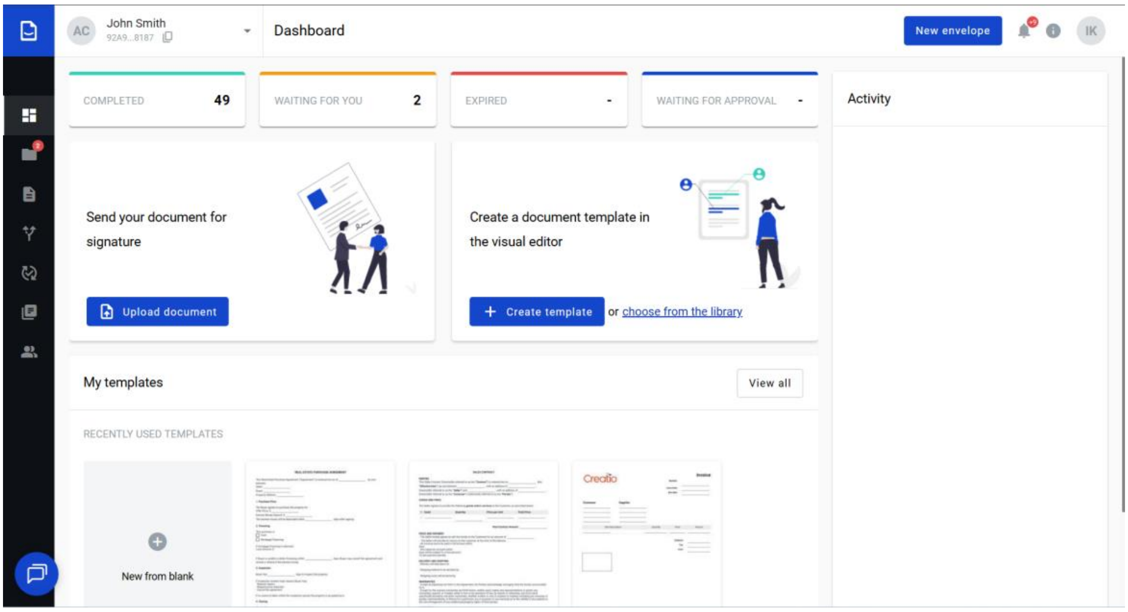
To enable proper integration between DocStudio and Creatio, please complete the following steps:

- **Register in DocStudio**
  Create an account using the following link:
  https://app.docstudio.com/auth/registration
- **Install the DocStudio Application in Creatio**
  Download and install the app from the Creatio Marketplace:
  https://marketplace.creatio.com/app/docstudio
- **Configure the Connection**
  Set up the integration between Creatio and DocStudio (see the "Connection Setup" section).
- **Configure Application Actions**
  Set up DocStudio actions (e.g., sending documents) within the required sections/objects in Creatio (such as Cases, Leads, or Deals).

1. Installation and Setup

1.1. Registration in DocStudio

1. Go to the login page: https://app.docstudio.com/auth/login and click **"Create account"**.
2. Enter your email.
3. Confirm your email using the verification code.
4. Select account type:
    - Personal
    - Company
5. Fill in required data and click **"Create account"**.
6. Once completed, you will be automatically logged into the system — your account is successfully created



✅ After registration, the user gains access to the DocStudio platform, where they can create and manage document templates, send documents for approval and signature, track document status in real time, and store documents with a full audit trail.

1.2. Installing the application in Creatio

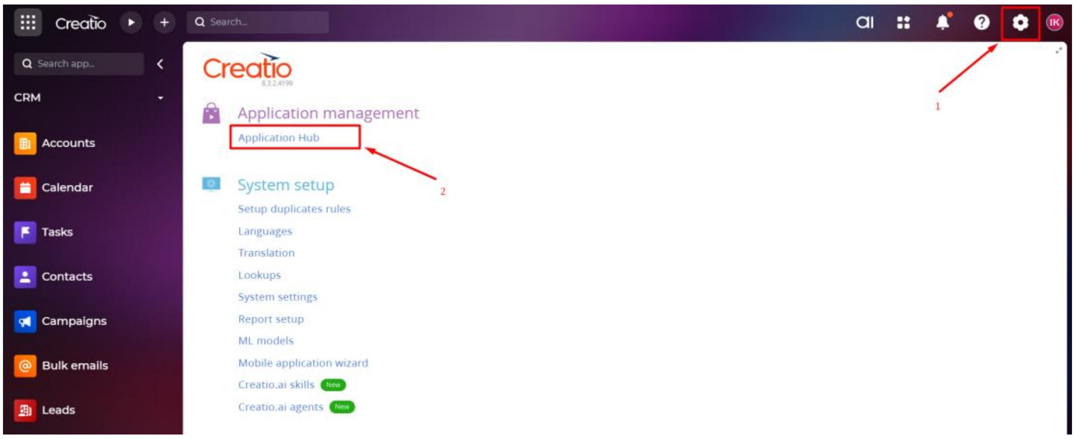
Since automatic installation from the Marketplace is not available, the application is installed through a partner.

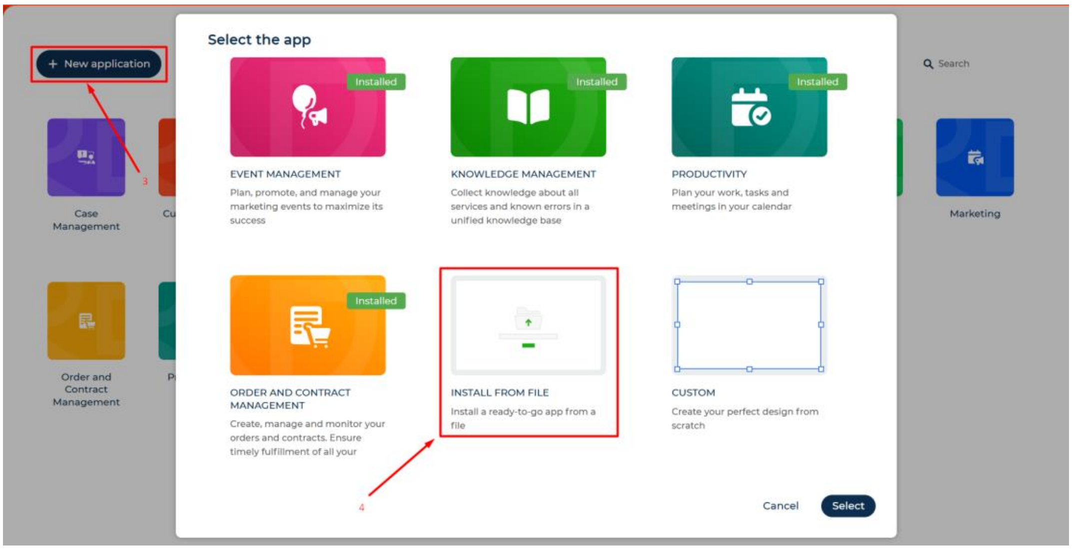
🔗 Application page:

https://marketplace.creatio.com/app/docstudio

Installation Process

1. Go to the application page and submit a request using the "Contact partner" button.
2. A representative from the DocStudio (Centredo) team will reach out to clarify your requirements, walk you through a demo, and explain the solution capabilities. Together, you will define the most relevant use case. Once everything is aligned, you can proceed with a test setup or move forward to a production project.
3. After alignment, the team will:
    - prepare the solution
    - provide the application file (installation package)
4. Upload the received package in Creatio via the "Application Hub" section

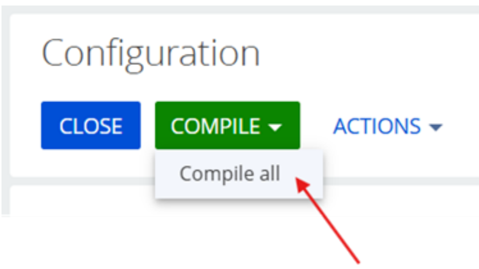




5. After uploading, the system will automatically install the application.

⚠️ Note: After installation, it is recommended to run a full system compilation:

1. Go to **“System Designer”**
2. Open **“Advanced settings”**
3. In the new window select **“Compile all”**



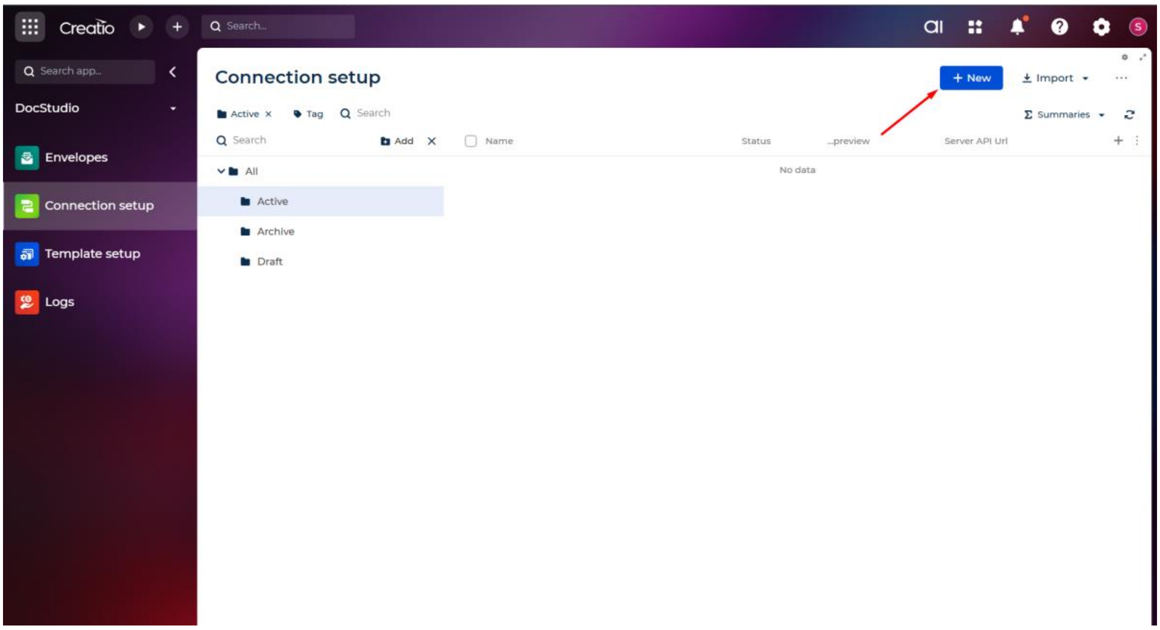
Result: After successful installation, a new workplace “DocStudio” will appear in Creatio, including the list of application sections and available functionality.

1.3. Configuring connection to DocStudio

After installing the application, you need to configure the connection between Creatio and DocStudio.

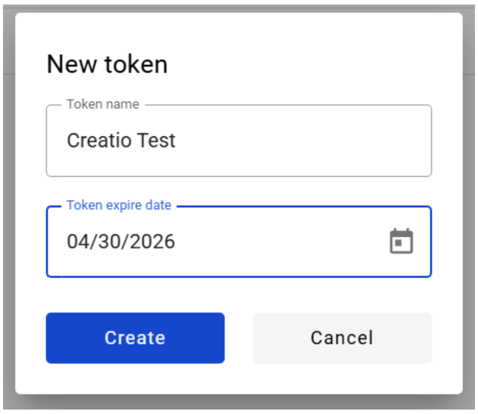
Configuration Steps

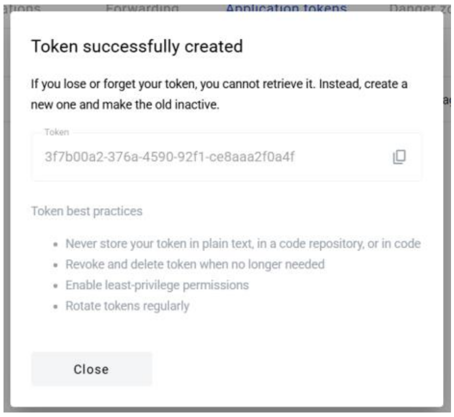
1. In Creatio, go to **DocStudio → Connection setup**



2. Click **“+ New”** to create a new connection
3. Fill in the required fields:
   - **Name** — any connection name
   - **Token** — API token generated in DocStudio

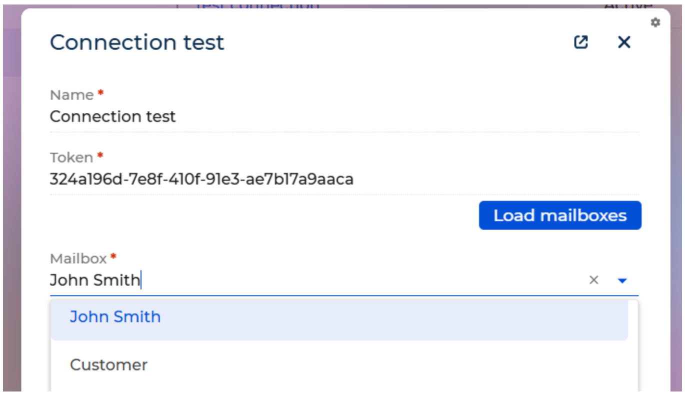
     ℹ️ **Note** before filling this field, you need to create an API token in DocStudio: https://app.docstudio.com/profile?activeTab=application-tokens
     How to create a token in DocStudio:
     https://support.docstudio.com/user/authorization-and-security/application-tokens-api-access#create-a-token



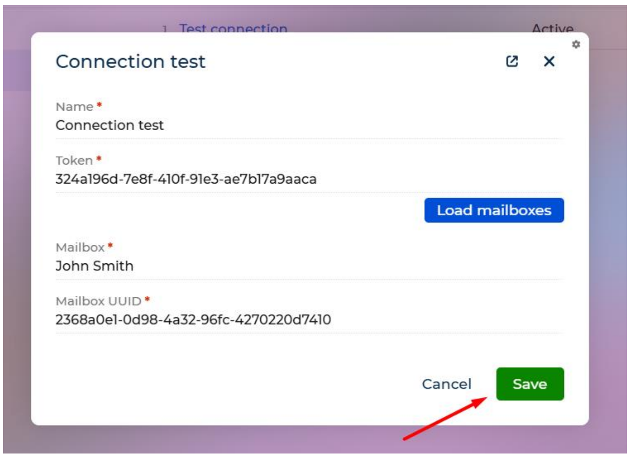


- Mailbox — mailbox (loaded automatically)

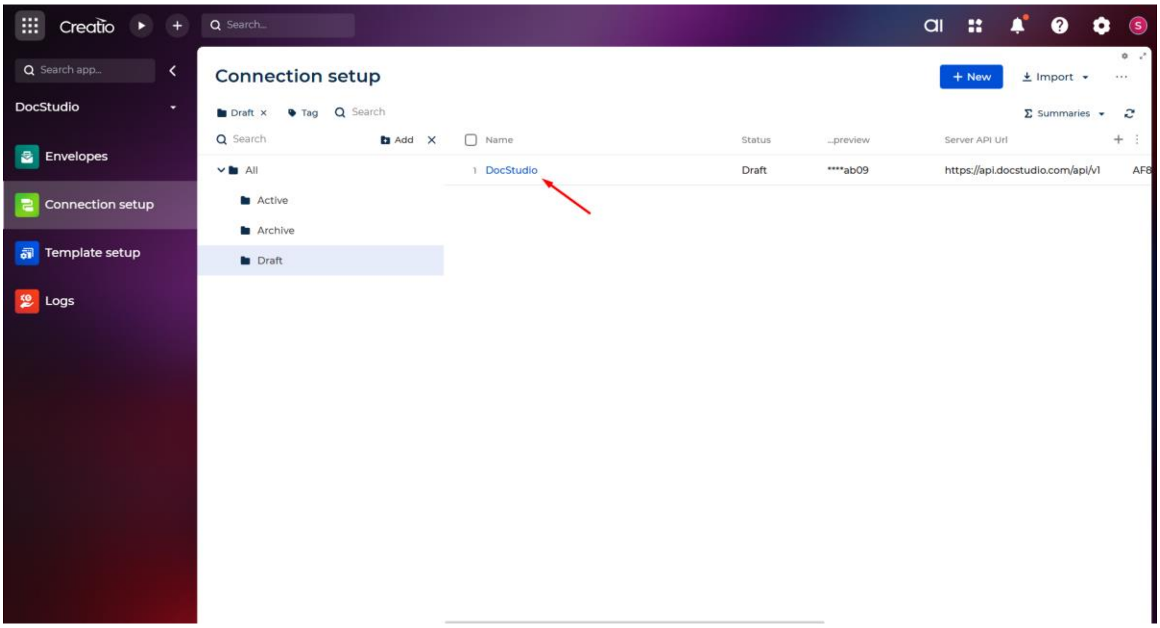
4. After entering the token, click **“Load mailboxes”**



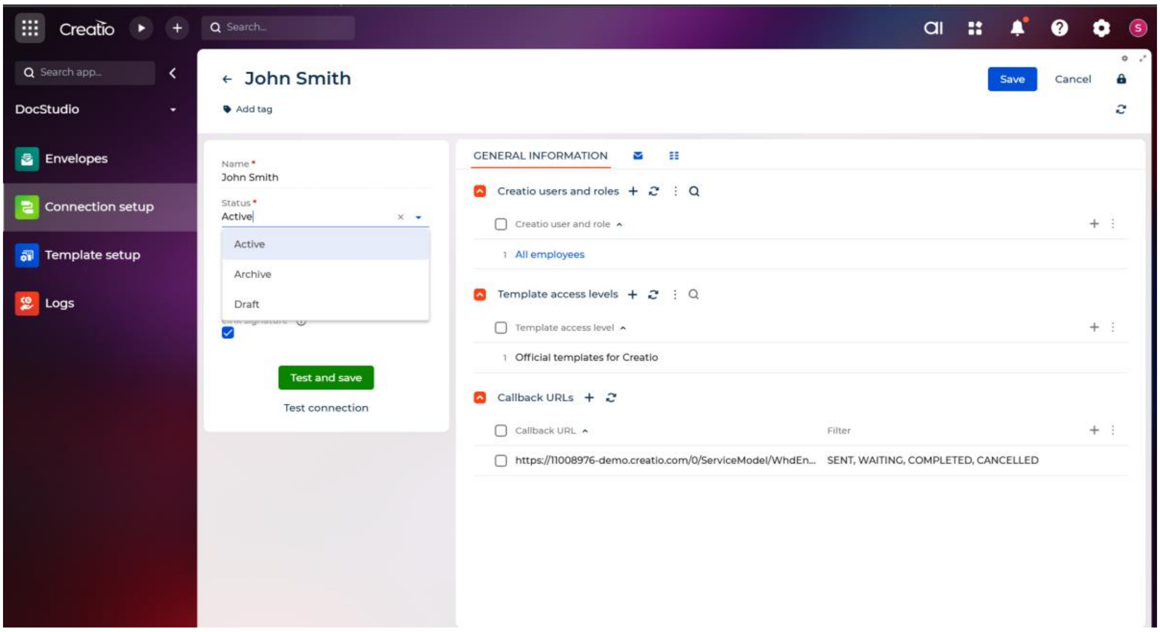
5. Select the required mailbox in the **Mailbox** field
6. Click **“Save”** to save the connection.



7. After saving, the connection will be available in the list.



8. Activate the connection and click **“Save”** again



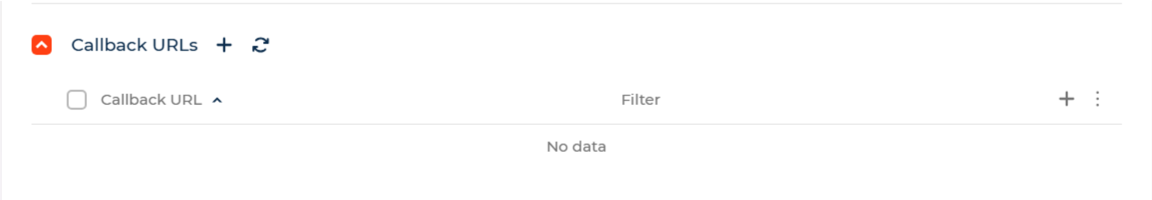
☑ **Result:** Once completed, the connection will appear in the list and be ready to use. The system is now configured for working with documents in DocStudio

1.3.1. Additional settings

After creating the connection, additional configuration options are available to enable more flexible work between Creatio and DocStudio.

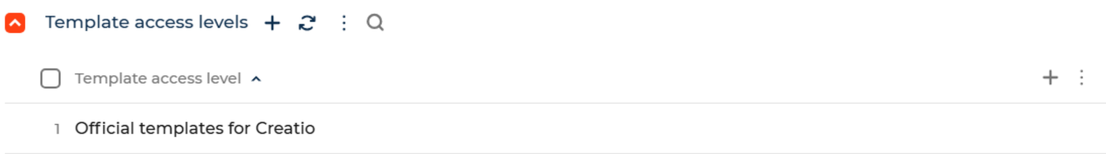
Available Settings

1. **Callback Configuration**
   Allows automatic setup of callbacks (webhooks) from DocStudio to receive document status updates in real time.



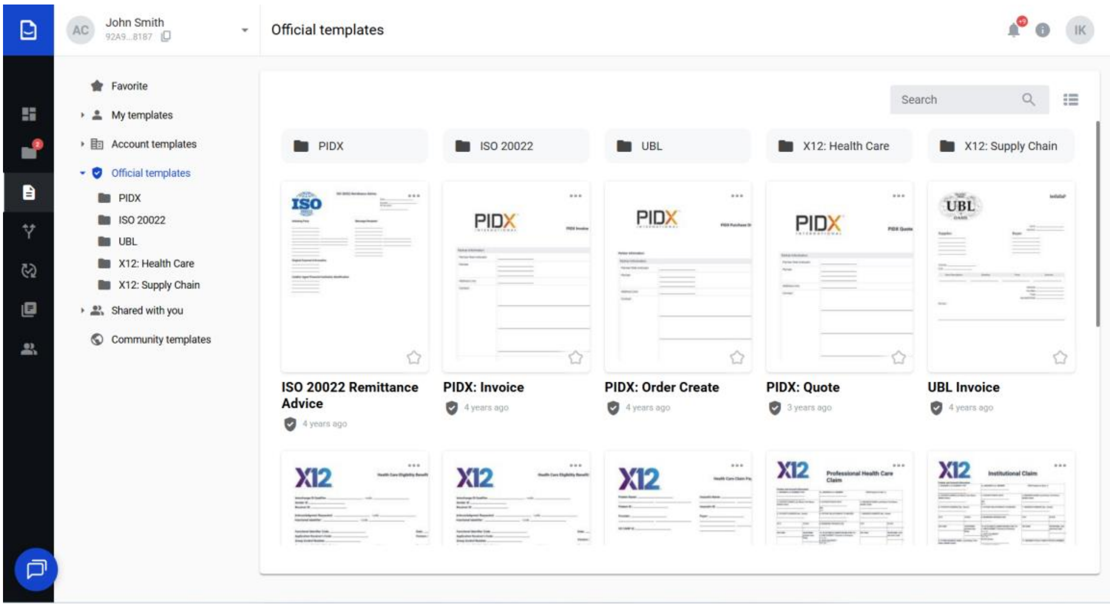
2. **User Access Configuration**
   Allows you to define which users have access to a specific connection and control who can send and manage documents.

3. **Access to Template Folders**
   You can restrict or grant access to specific template folders in DocStudio.



   At the same time:

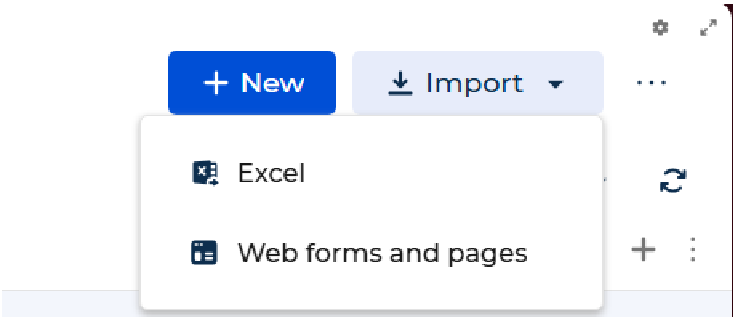
   - the “Creatio” folder is created automatically
   - this folder contains official templates provided by DocStudio
   - these templates can be used as a base or customized for your use case



4. **Import Connections from CSV**

Enables bulk management of connections and access settings:

- Mass creation of connections
- Quick distribution of user access
- Avoids manual setup of large numbers of records
- centralized connection management



5. **eInk Signature Setting (QuickSend)**
   Defines the type of signature used for documents:
   - If enabled — eInk signature is used
   - If disabled — Qualified Electronic Signature is used
   - Default — If enabled

ℹ **Note:** It is recommended to align the selected signature type with your legal and compliance requirements.

6. **All configured connections are displayed in a list, where you can:**
   - edit settings
   - update tokens
   - monitor and control connection status

1.4. Configuring application operation in Creatio

After connecting to DocStudio, it is necessary to configure how the application will operate within Creatio based on your company's business processes.

This step includes integrating DocStudio functionality into relevant system sections and preparing the user workflow for working with documents.

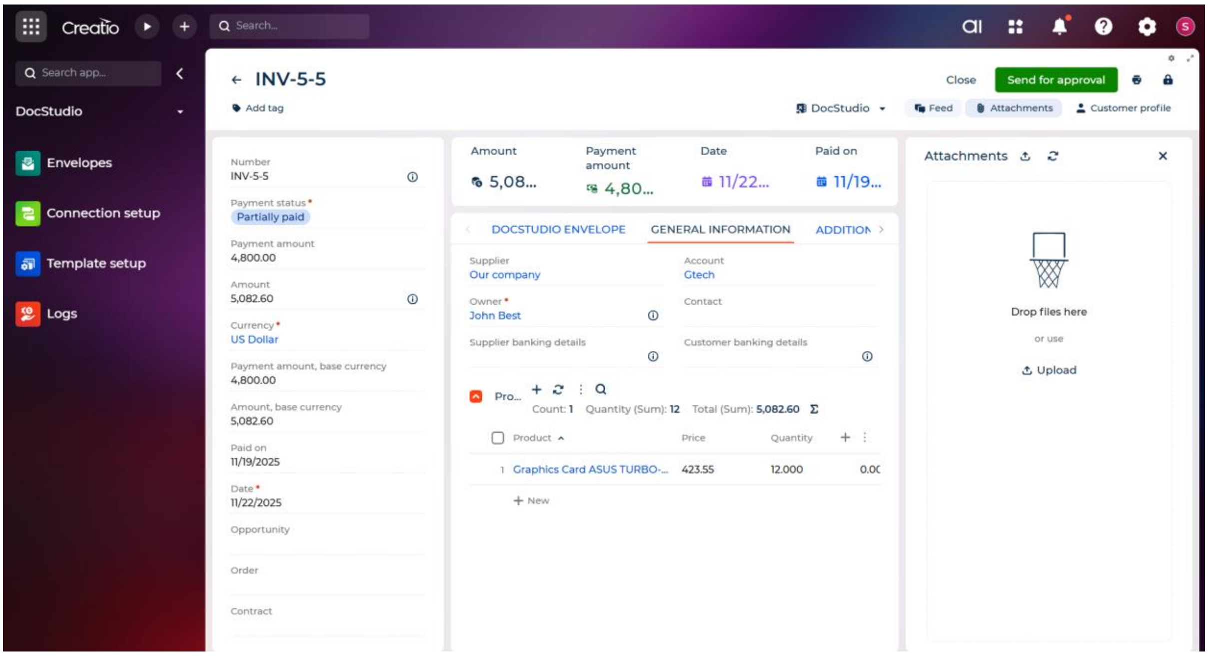
How It Works
Integration with Creatio allows you to configure DocStudio at the level of individual records.

- The document sending logic (processes, buttons, workflows) can be tailored to a specific object or record type
- Different document templates can be assigned to different records (e.g., Deals, Accounts, Cases, etc.)
- The set of fields to be completed can vary depending on the data within each record
- Conditions for applying specific templates (filters and rules) can be configured

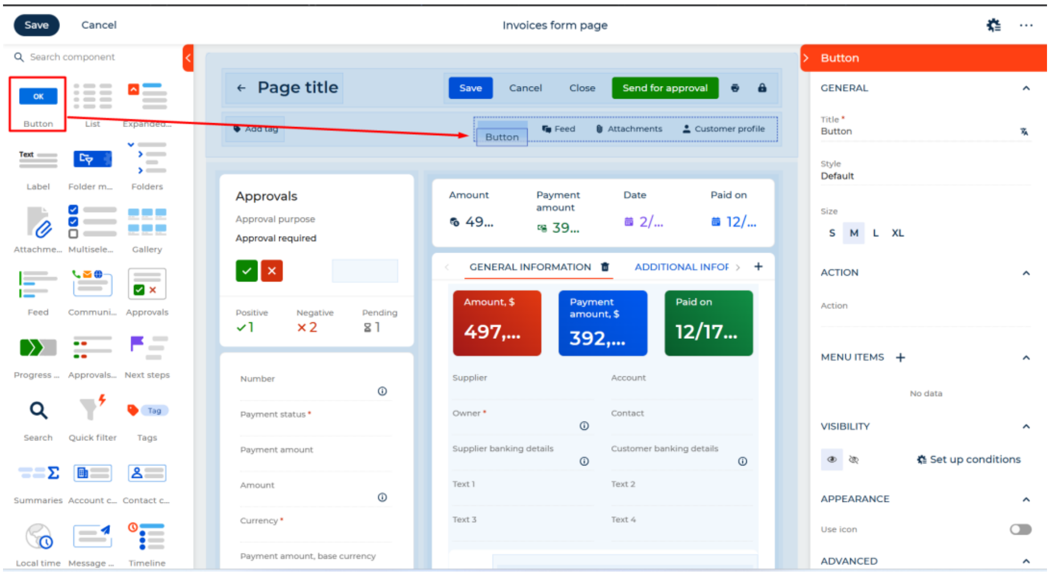
1.4.1. Adding actions (buttons) to sections

To work with documents in Creatio, it is necessary to add DocStudio actions to record pages (for example: Invoices, Deals, Cases).

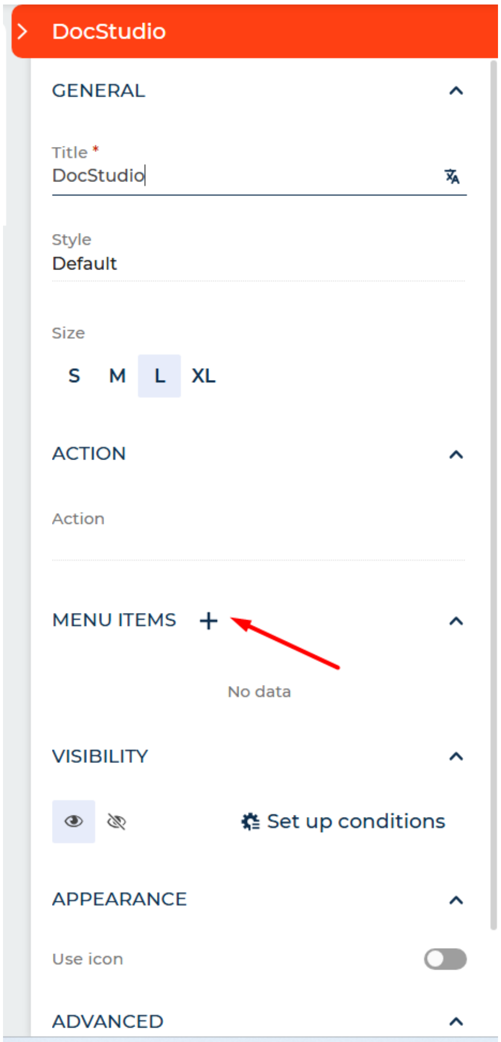
1. Open the required record page (for example, Invoice) and navigate to **System Designer**.



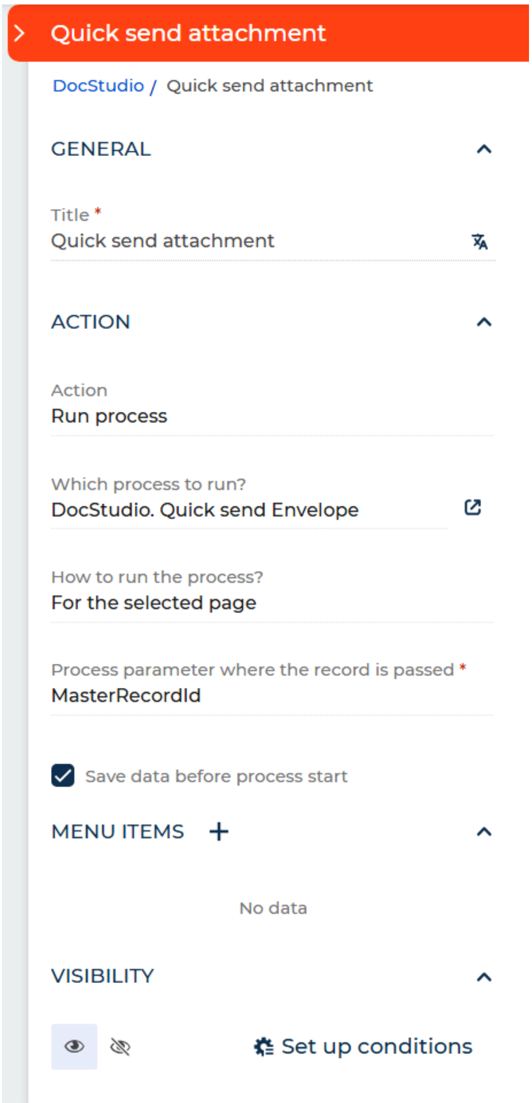
2. In **System Designer**, add a button to the record page that will be used to trigger a DocStudio action.



3. Configure **Menu Items** for the button to enable multiple DocStudio actions from a single button.



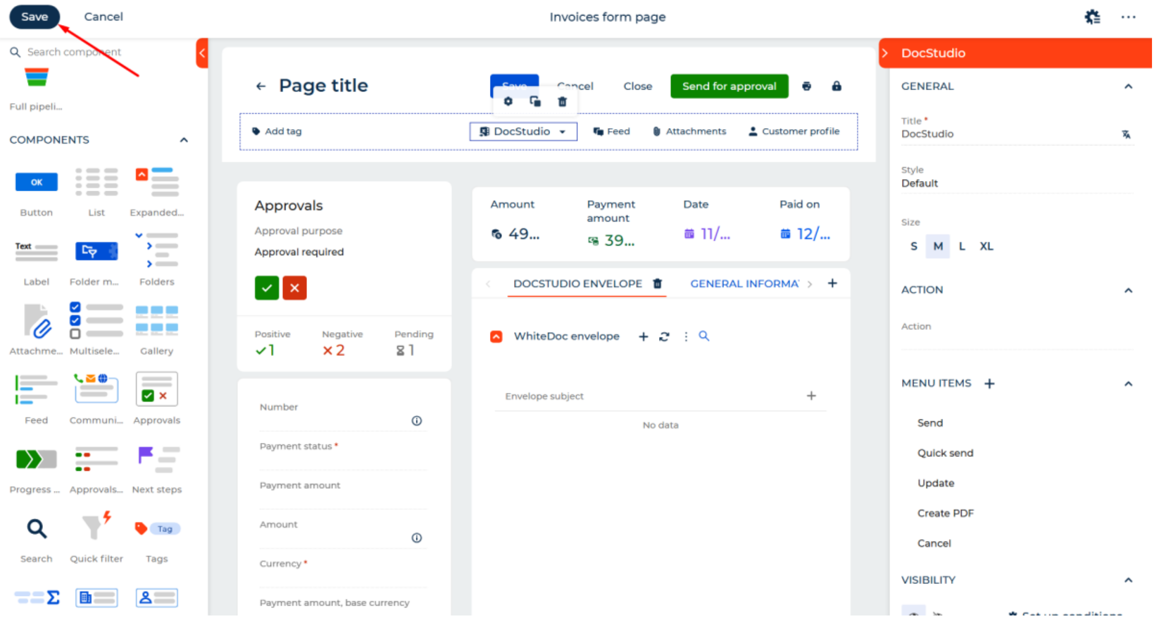
4. Configure the action (for example, **Quick Send Attachment**) with the following settings:
   - **Title** — custom name for the action
   - **Action** — Run process
   - Which process to run — **DocStudio. Quick send Envelope**
   - How to run — **For selected page**
   - Icon — optional



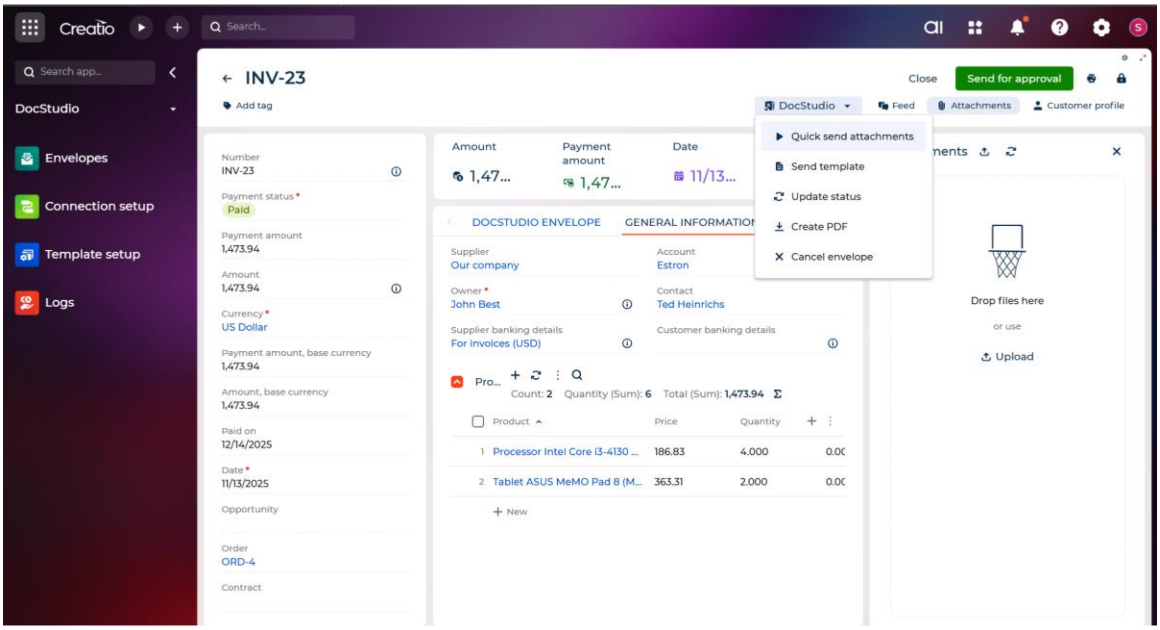
5. Below are the main DocStudio processes and their descriptions. These names can be used when searching for actions in Creatio.
   The full list of available actions is provided in the additional materials.

Process Name	Description
DocStudio. Quick send Envelope	quick sending from attachments
DocStudio. Create Envelope and send	create and send envelope
DocStudio. Update Envelope status	update status
DocStudio. Cancel Envelope	cancel envelope
DocStudio. Get Envelope archive	get archive
DocStudio. Get Envelope for print	get printable PDF

6. After completing the configuration, **Save** the page to apply the changes.



7. The configured actions will be available on the record page for users to access and use.



1.4.2. Adding the list of sent documents and their statuses

For better visibility and control of document workflows in Creatio, it is recommended to display the list of sent documents and their statuses directly within system records.

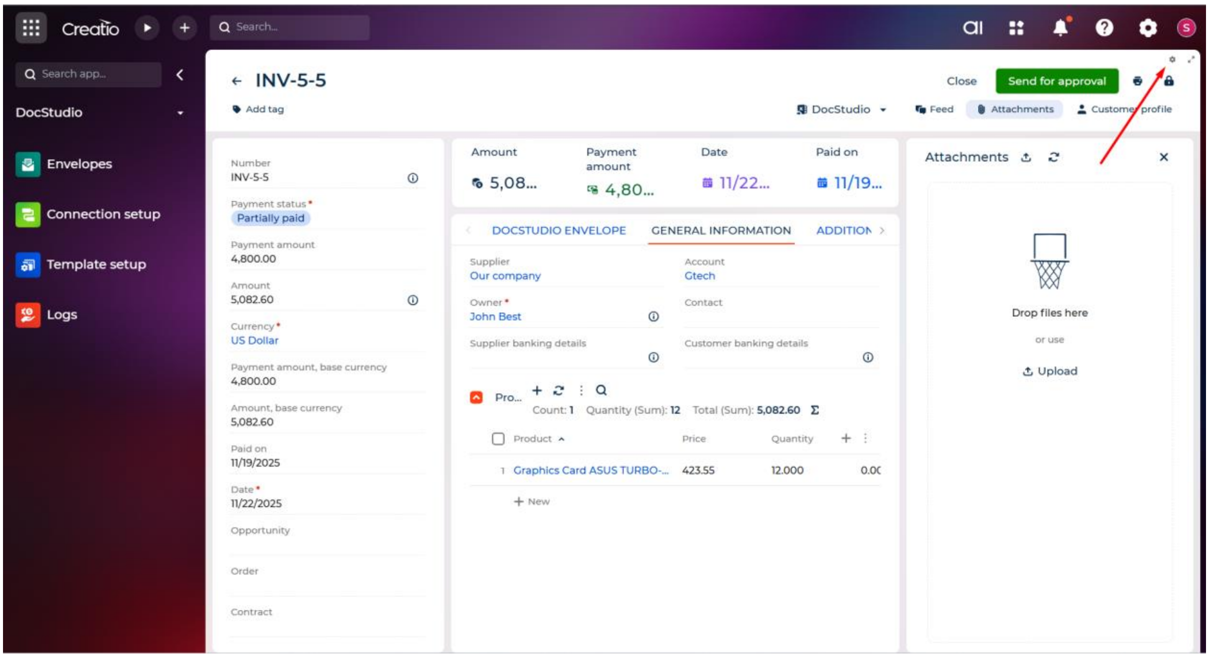
Each record (for example: Invoice, Deal, Account) can display related DocStudio envelopes.

What This Enables:

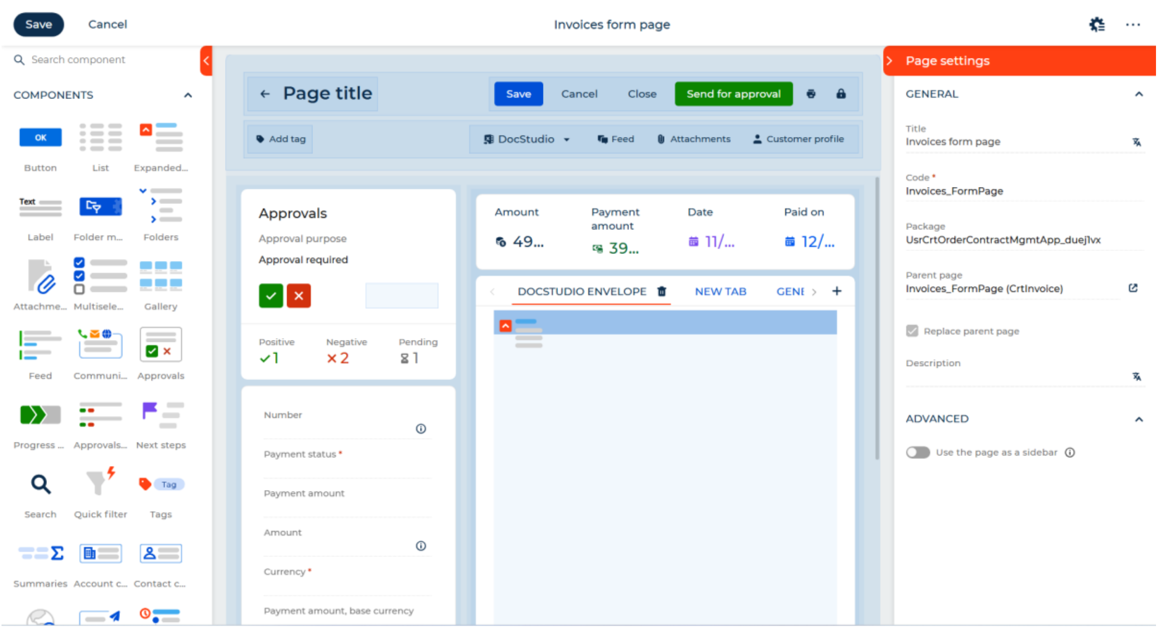
- View document status (sent, signed, rejected, etc.)
- Track document history
- Access files and signing results

👉 All information is available directly within the record.

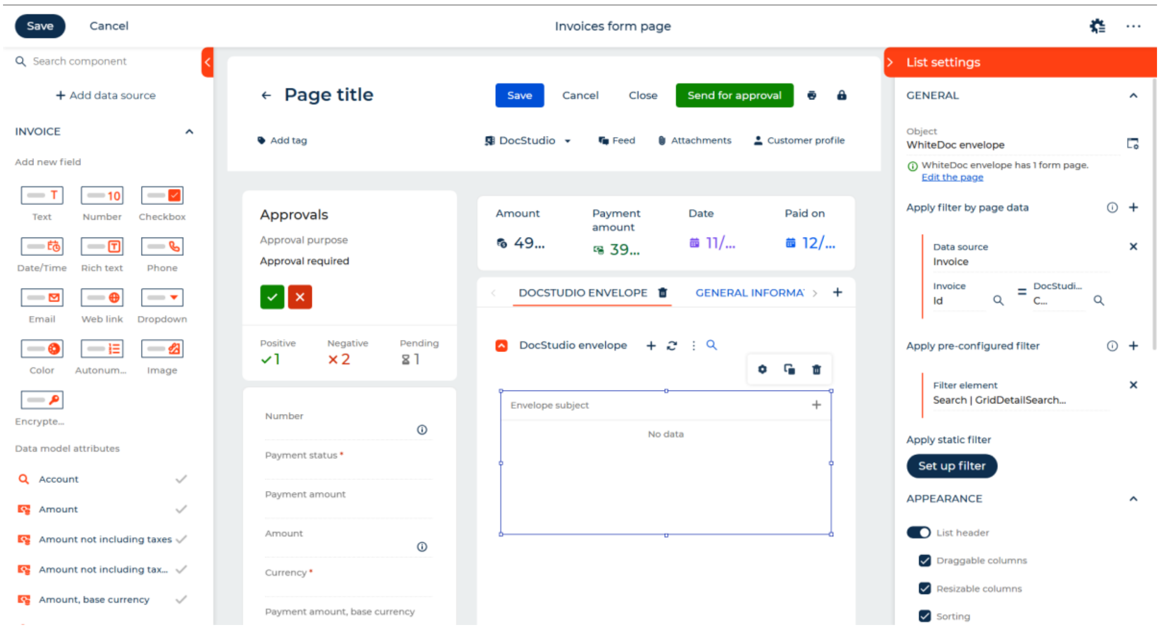
1. Open the required record page (for example, Invoice) and go to **System Designer**



2. Add an **Expanded list** component to the page



3. Click on the **Expanded list**



4. Configure the **Expanded list** filter:
   - Object — select **DocStudio envelope**
   - Apply filter by page data — add a filter
     - Invoice — select id
     - DocStudio — select Entity record id
     - Leave the rest unchanged

5. After configuration, it is necessary to **Save** the page in the **System Designer**.

☑ Setup Complete

Congratulations! At this stage, the technical setup of the DocStudio application is complete.
After adding the required actions (buttons) and configuring the envelope list (Expanded list), the Creatio interface is fully integrated with DocStudio.

You can now open any record (for example, an Invoice or Contract) and access all configured actions through the DocStudio button menu. With the connection activated and processes in place, the system is ready for sending documents, using templates, and tracking document statuses in real time.

To get started, simply open a record and choose the appropriate action:

- **Send** — to generate a document from a template
- **Quick Send** — to send an existing file for signing

Your document workflows are now digital, transparent, and automated !

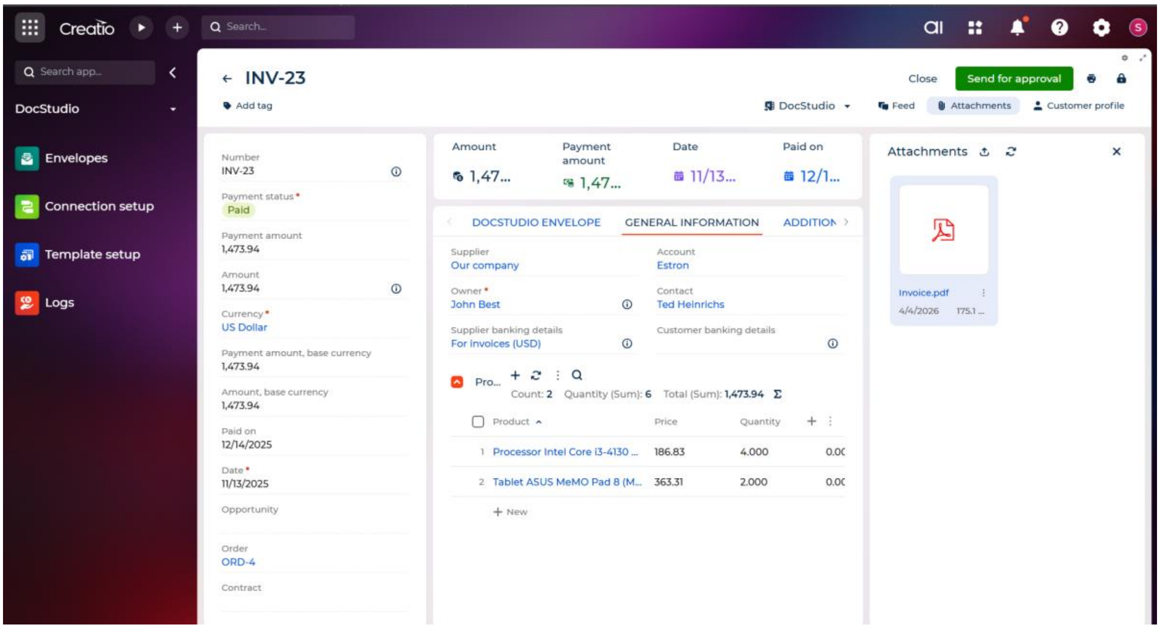
2. Working with documents

After completing the basic setup, the system is ready for data and docuemnt exchange between Creatio and DocStudio.
DocStudio provides several working scenarios depending on your business needs.

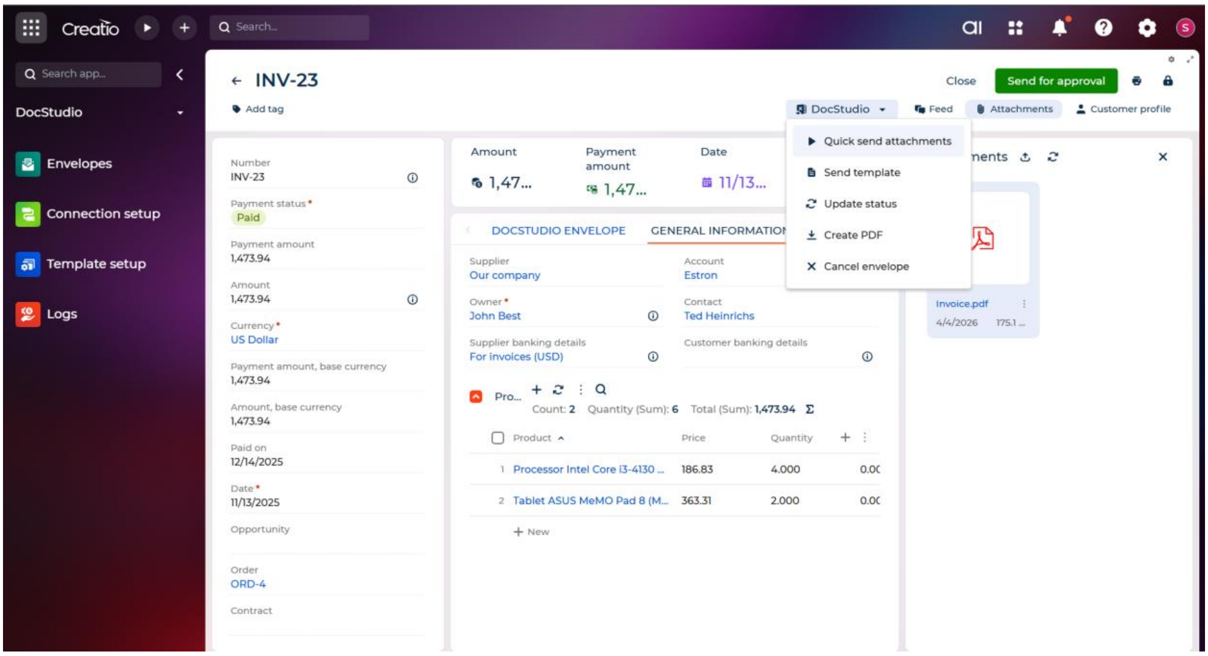
2.1. Quick sending of attachments (Quick Send)

This scenario is used when you already have a ready file (for example, a PDF invoice or agreement) that needs to be sent for signing.

1. Open the required record in Creatio (for example, Invoice).
2. Make sure that the file is uploaded to the **“Attachments”** section



3. Click the **DocStudio** button → **Quick Send** (or the custom name you configured)

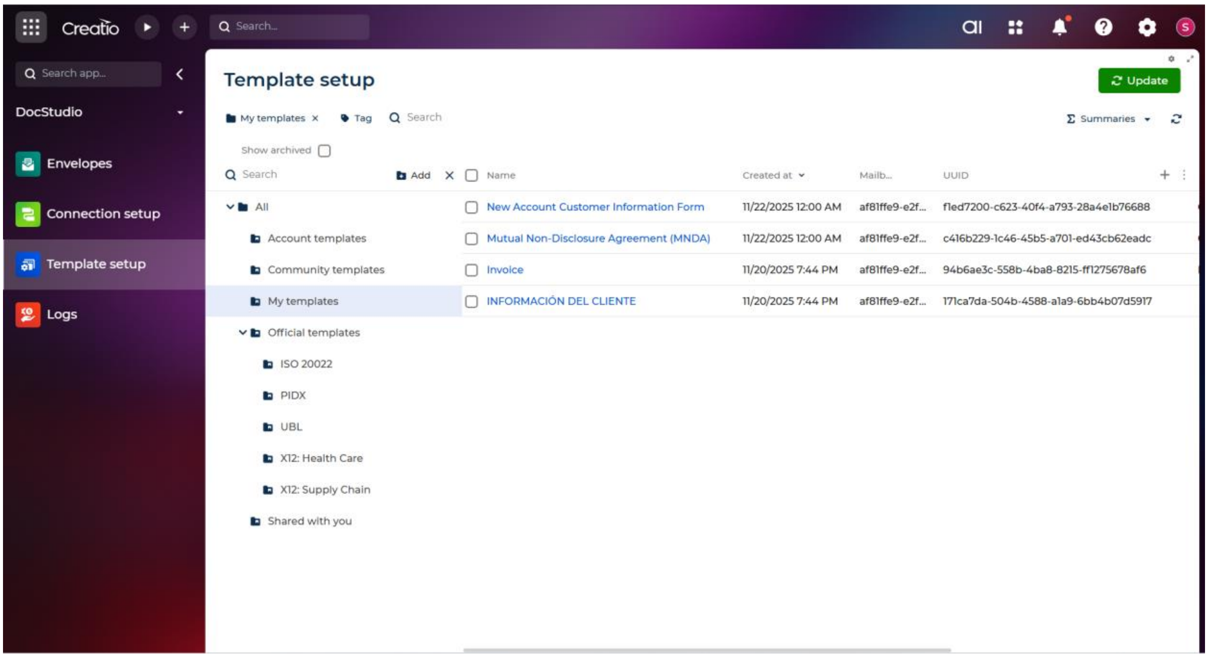


4. Filling in sending parameters (Fill in envelope data). In the opened window, provide the required details:
    - Subject — title of the envelope visible to the recipient
    - Message — email text sent along with the document
    - Recipients (Flow roles): In the detail “Fill in mailbox for process roles”, select from Creatio contacts, or specify UUID of the mailbox, or email for each participant (for example, Client or Director). Recipients can also be predifined— this must be configured in Template settings.

5. The system instantly creates an envelope in DocStudio and sends it to the recipient.
6. Result of sending:
   - A new record is automatically added to the “DocStudio Envelopes” section in Creatio
   - You can click the “Preview” button to view the document content directly in the Creatio interface (via iframe), or open it in the full DocStudio window for detailed review

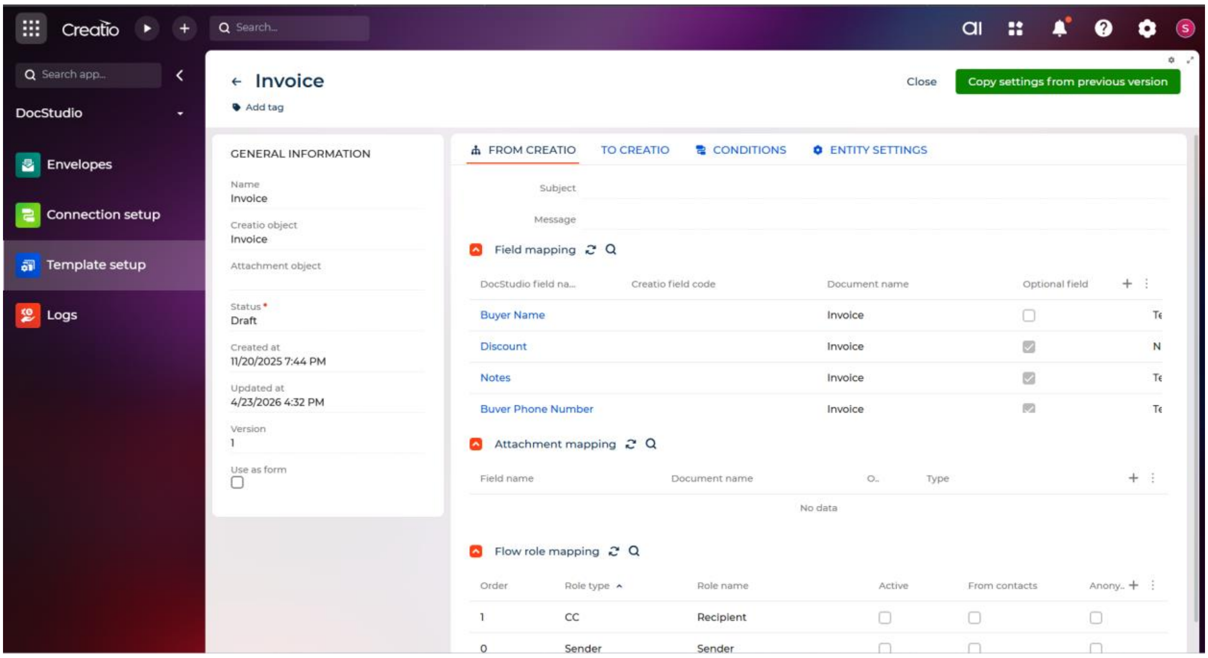
2.2. Sending ready forms (Forms)

This scenario allows you to use pre-configured DocStudio templates as interactive forms. It is useful when part of the data is not available in Creatio or when field mapping has not yet been configured. It also allows you to send the document without being authorized in DocStudio.

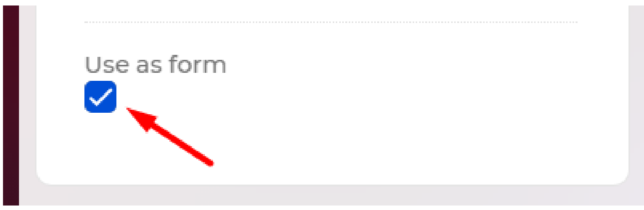


To use a template as a form, it must be configured in advance:

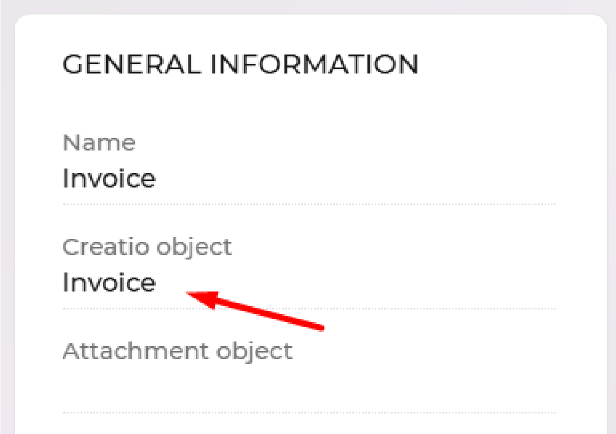
1. Go to **DocStudio → Template settings**
2. Open the r**equired template** that is available in DocStudio



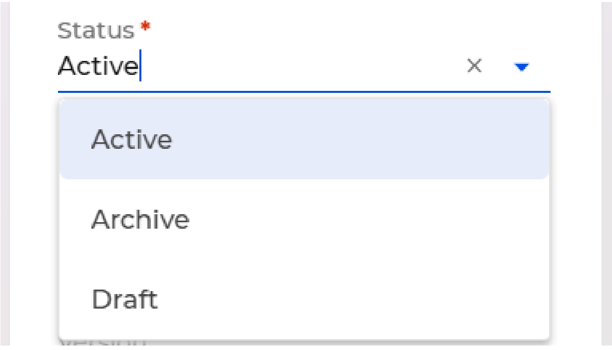
3. In the template card, enable the **"Form"** checkbox (this activates interactive filling mode)



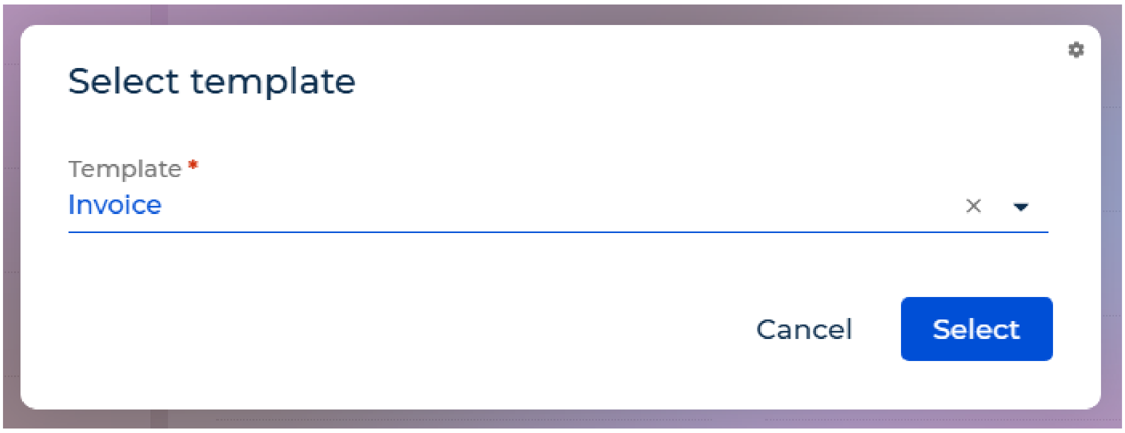
4. In the “Creatio Object” (Object) field, select the Creatio object (for example, Invoice or Contact) from which data will be populated



5. Set the template status to **“Active”** and **Save** the record



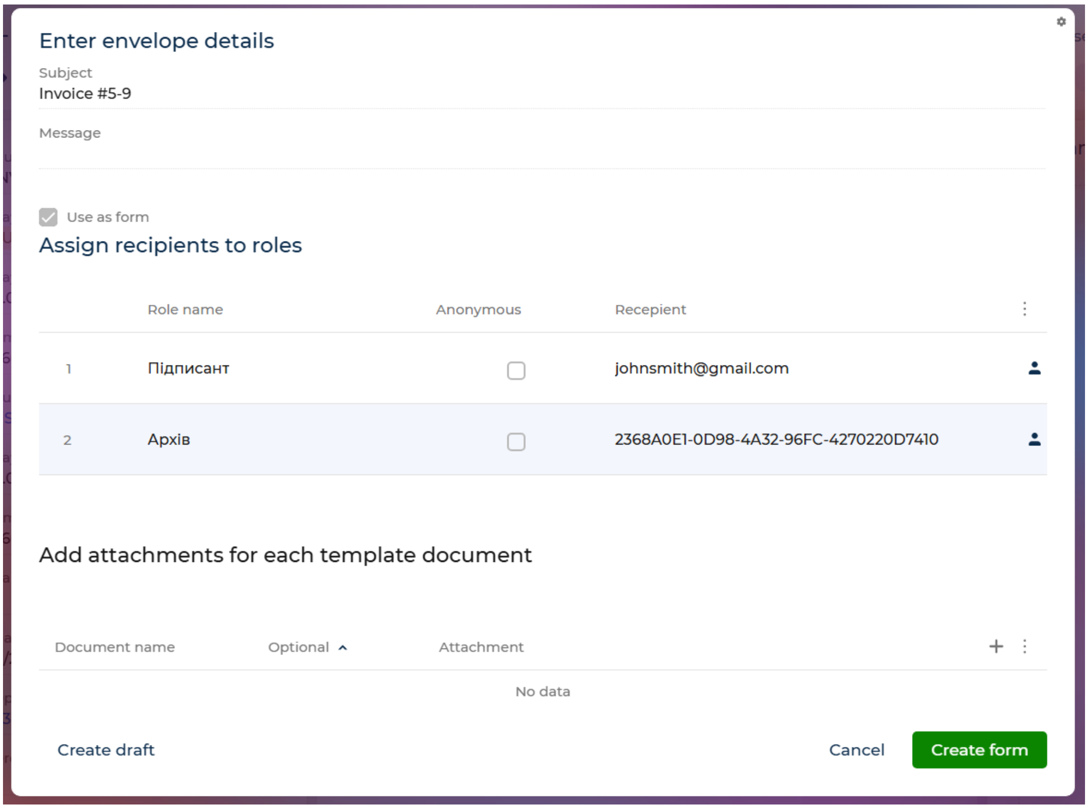
6. Click the **DocStudio** button within the object you configured it on → **Send and select the template** configured as a form



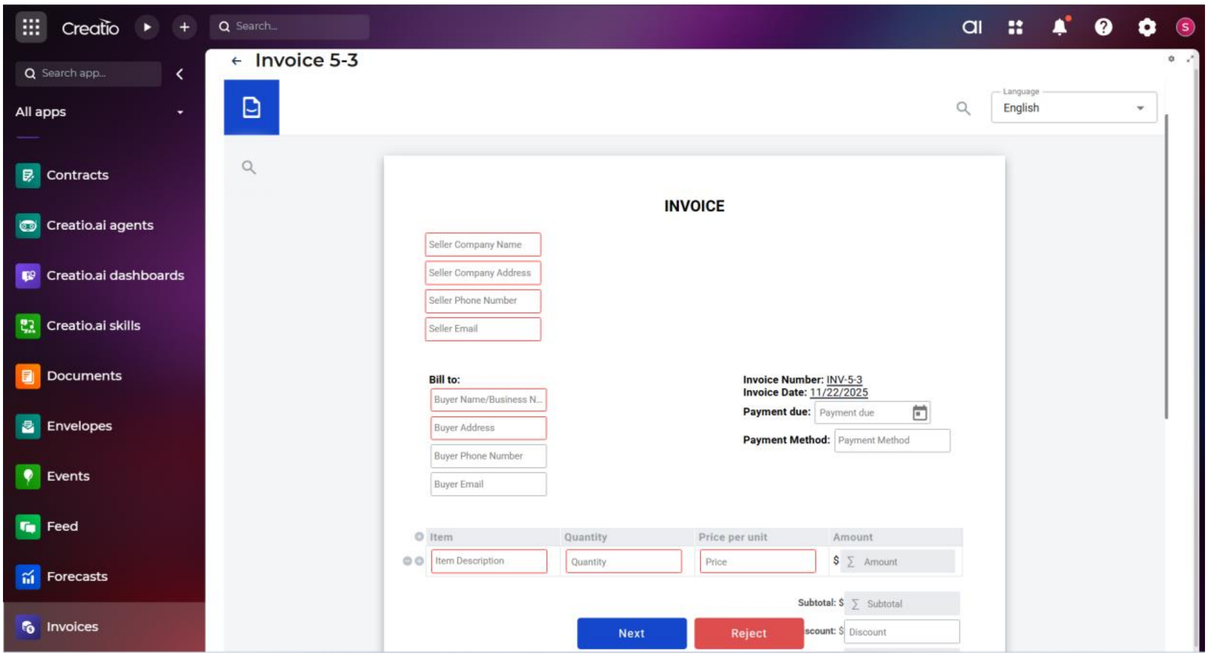
7. Filling in sending parameters (Fill in envelope data). In this window, you need to specify:

   - **Subject:** Set the envelope title that the recipient will see
   - **Message:** The body text of the accompanying email
   - **Recipients (Flow roles):** In the detail “Fill in mailbox for process roles”, select from Creatio contacts, or specify UUID of the mailbox, or email for

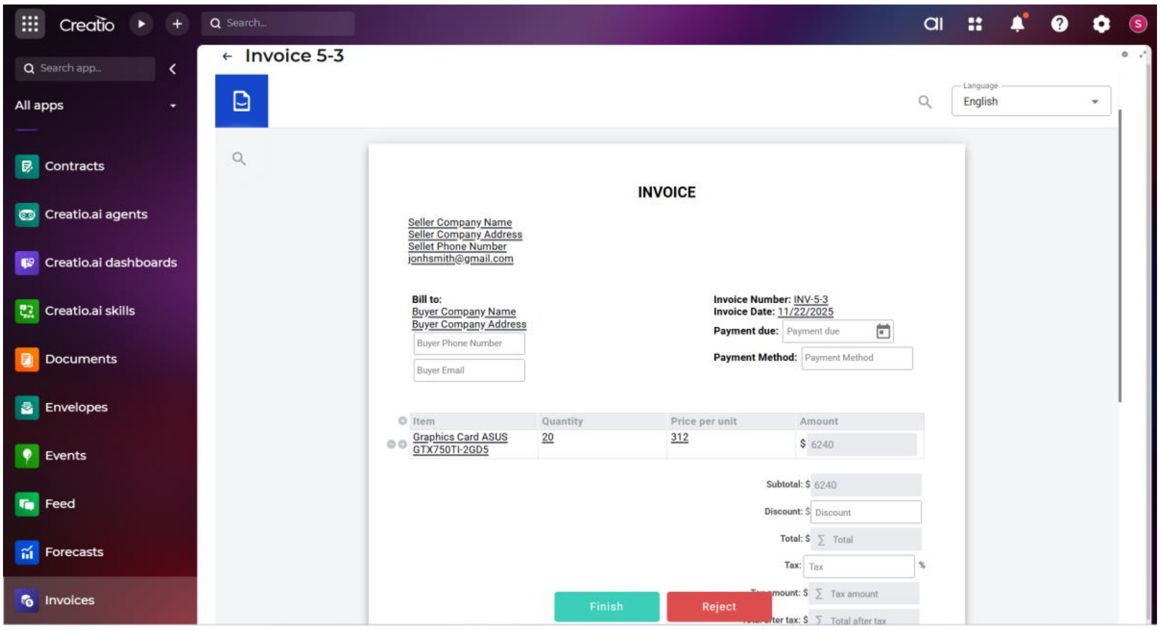
each participant (for example, Client or Director). Recipients can also be filled automatically — this must be configured in Template settings



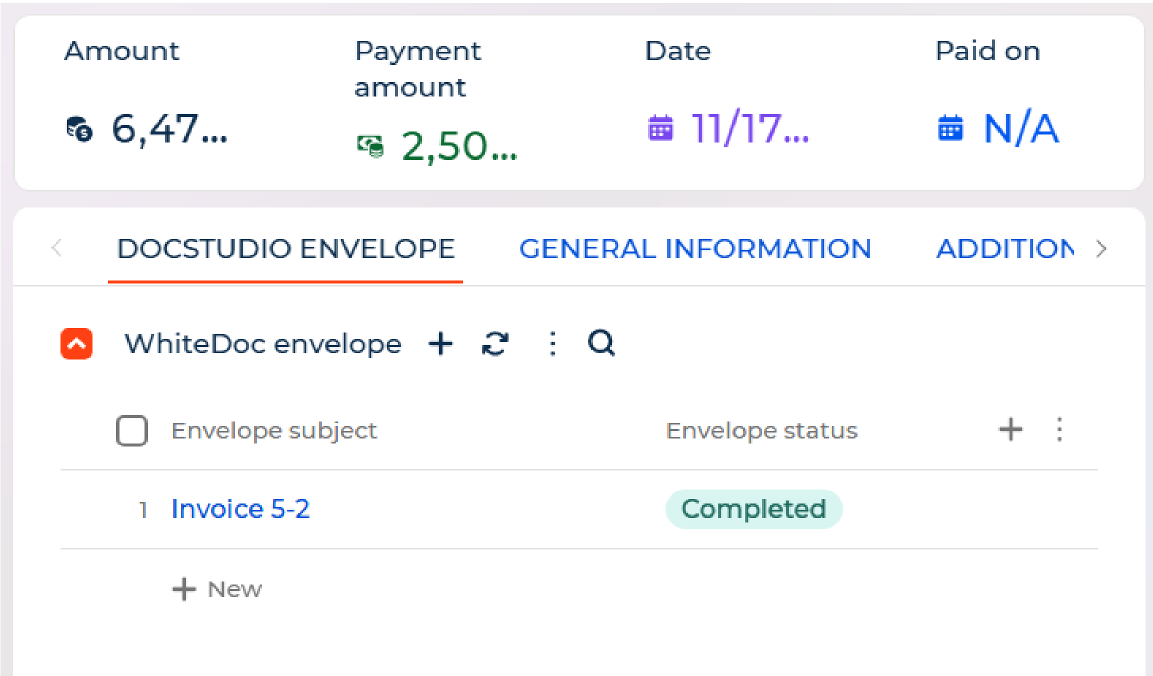
8. The document form opens instantly in an embedded window directly within the Creatio interface. At this stage, you can manually fill in any fields or modify existing data directly in the document. This allows you to send documents without pre-filling all data in the Creatio record.



9. After completing all required fields, click the **“Send”** button in DocStudio.

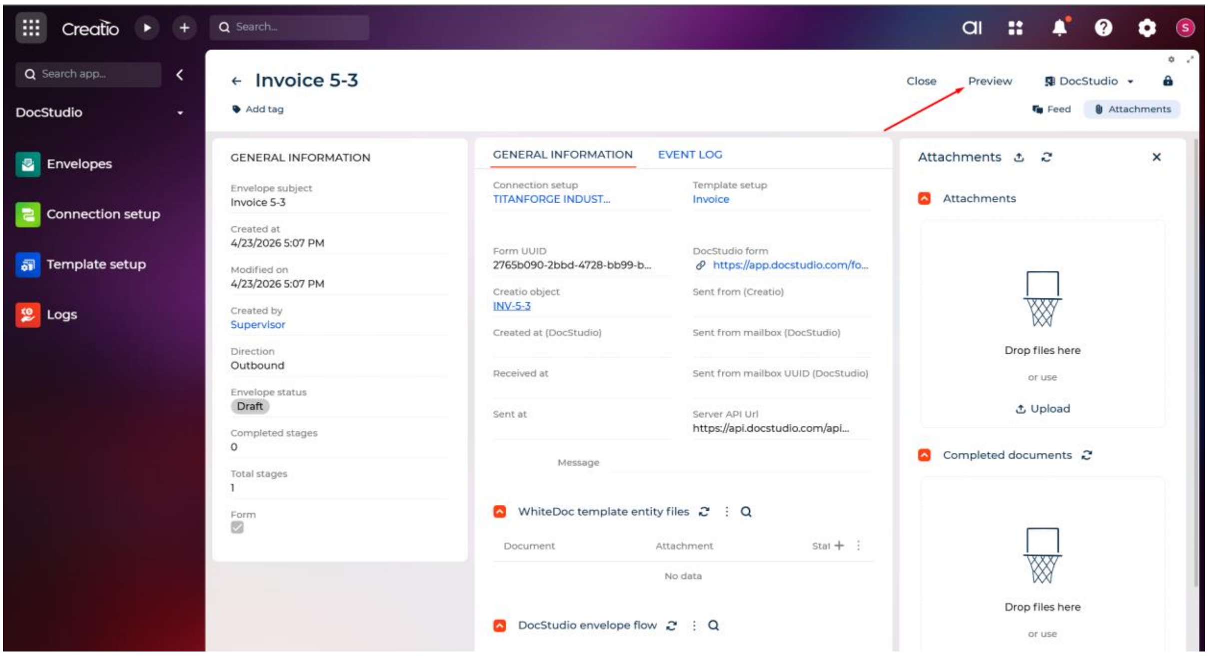


10. The document is sent, and a new envelope is automatically added to the **"DocStudio Envelopes"** section of the record in Creatio. Recipients are automatically notified and can review/fill/sign the document based on their assigned roles in DocStudio.



If callbacks (webhooks) are configured, the envelope status will be updated automatically after sending.

You can use the **Preview** button at any time to view the completed document or track the signing progress.



2.3. Sending documents using configured templates (Mapped Templates)

This method provides the highest level of automation. It allows you to use templates configured in DocStudio and linked to specific objects in Creatio.

ℹ Note: Detailed instructions for **template mapping and configuration** are described in the Template Configuration section.

1. In the Object record (for example, Invoice), click the **DocStudio** button → **Send**

2. **Select the required template.**
   The system will automatically generate the document by inserting data from Creatio fields based on the configured mapping.

3. In the **"Fill in envelope data"** window, verify or complete the following:
   - **Subject:** The name of the envelope that the recipient will see
   - **Message:** The accompanying message text
   - **Flow roles (Recipients):** UUID or email of the signers' mailboxes (if they were not defined in the template by default)

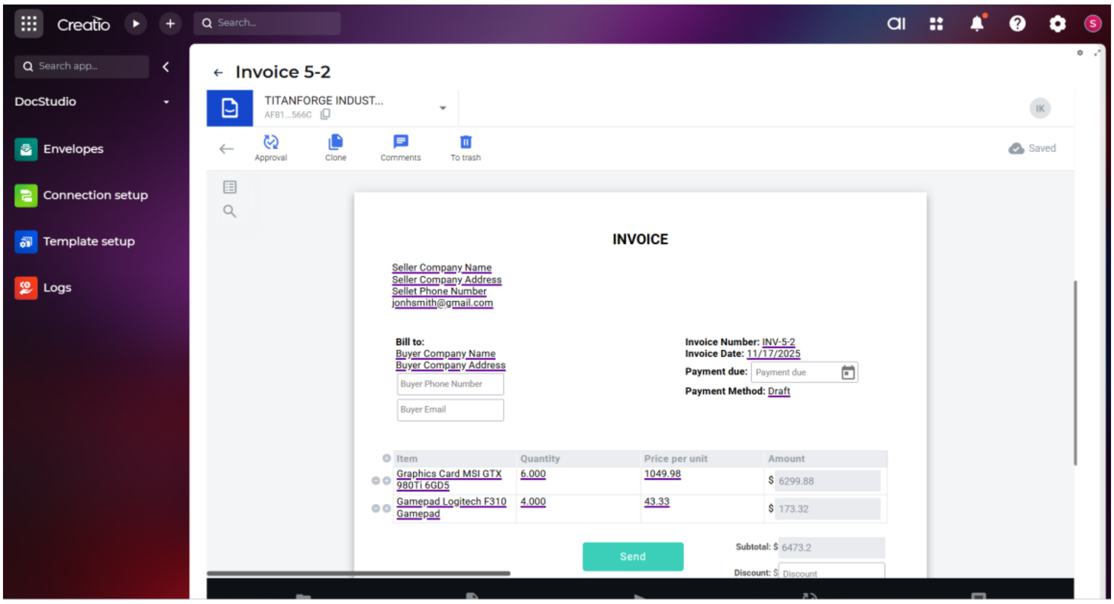
4. **Sending:** Click the **"Send"** button

2.3.1. Working with drafts (Drafts)

The Draft status allows you to review and modify a document before sending it to recipients in DocStudio, directly from Creatio.

- **Automatic Creation:** When you click “Send” from a record, the system creates an envelope in Draft status.
- **Preview:** You can close the sending window and return later via the “DocStudio Envelopes” section. Click **“Preview”** to open the document in an embedded view within Creatio.
- **Real-Time Editing:** In preview mode, you can manually fill in fields or adjust the document content. This is useful when some data is missing or needs clarification.
- **Draft Updates:** You can update the draft multiple times and review changes as needed before final sending.

The draft remains editable until you click “Send” in the envelope window, allowing full control over the document before it is delivered to recipients.



3. Field mapping (Mapping)

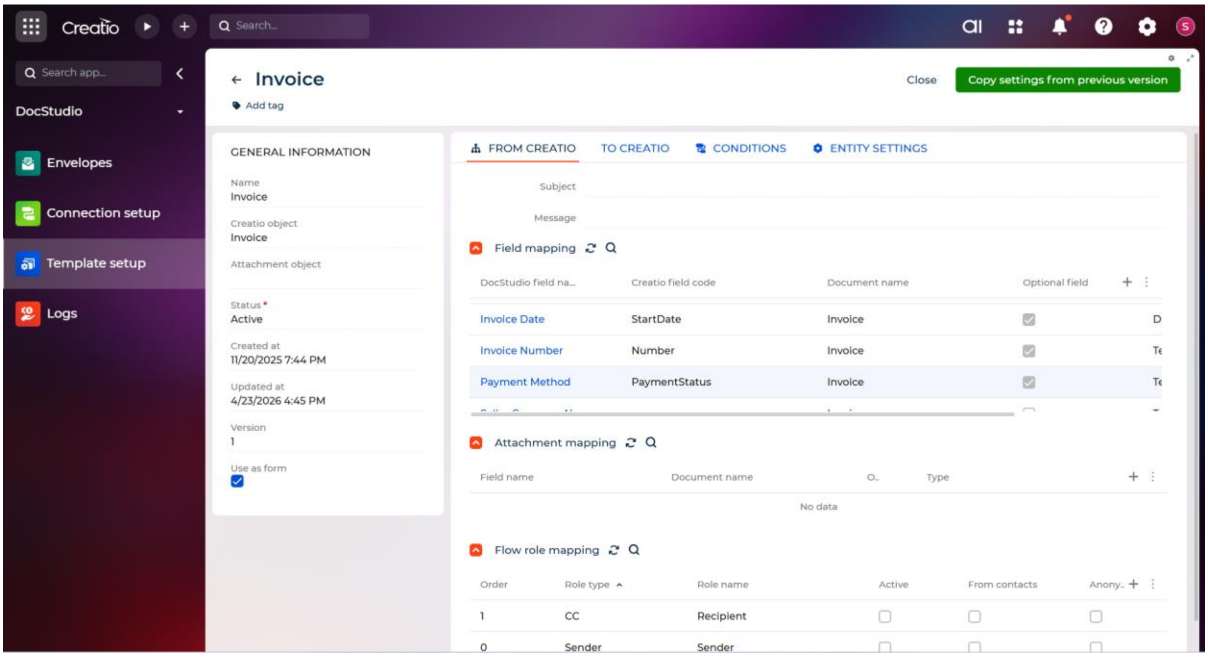
Mapping is the process of linking fields from Creatio to fields in document templates within DocStudio.

This enables automatic population of documents with data from Creatio and ensures consistent data synchronization between the system and the document templates.

3.1. Field Mapping From Creatio (Data transfer to document)

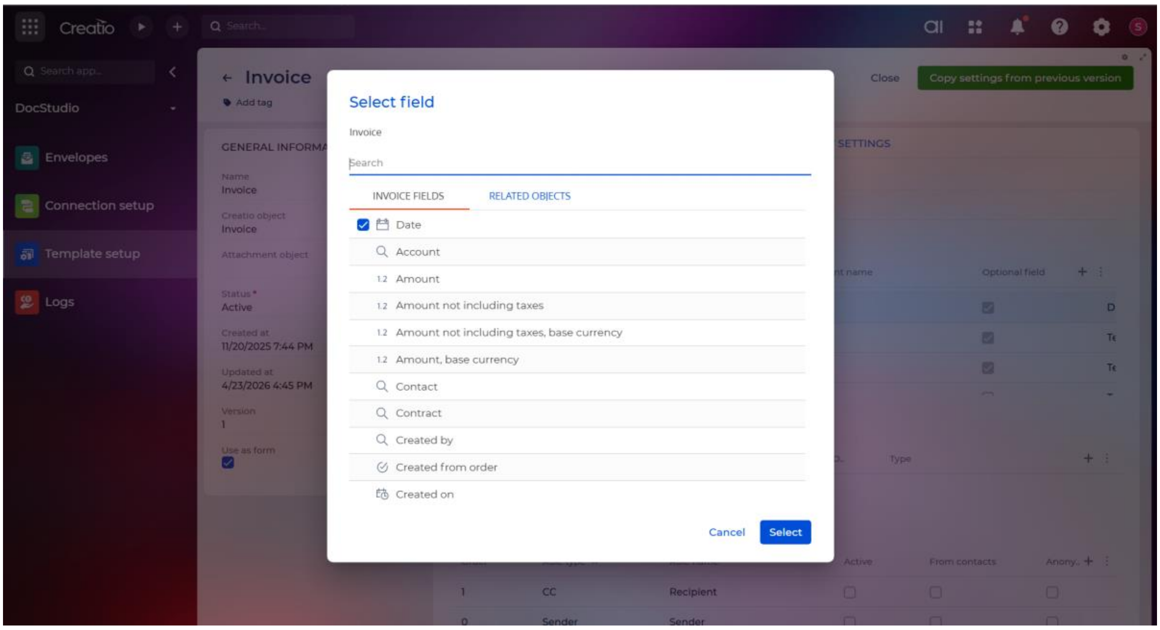
This type of mapping ensures that values from Creatio records are automatically populated into the document before sending.

1. Go to **DocStudio → Template settings**
2. Select the required template and open the **Template settings** tab



Open the **"From Creatio"** tab — this section is used to map data from Creatio

3. In the **"Field mapping"** section, define the corresponding Creatio field for each element in the document template

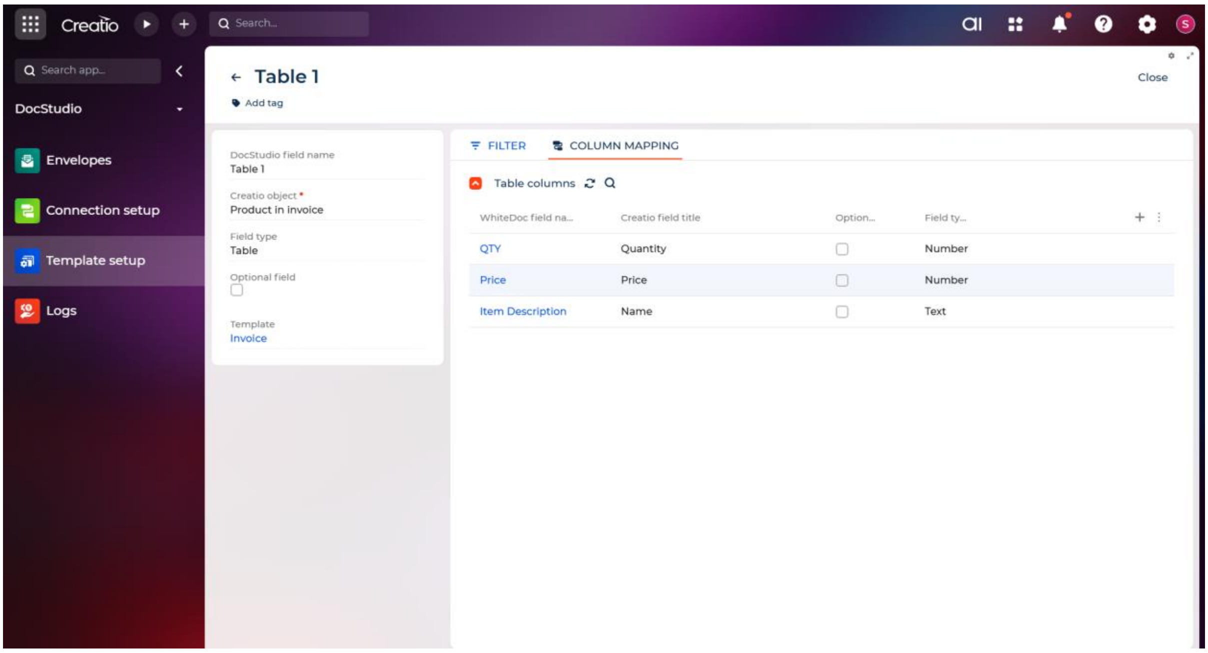


4. If some data may be missing, mark the field as **Optional**.
5. This allows the system to send the document even if the field is not populated.

- **Technical Details:**
  - **Column path** — defines the path to the field in Creatio from which the value will be pulled into the document
  - **“Optional”** flag — if a field is not marked as optional and remains empty, the system will prevent the template from being set to **Active**

Field mapping

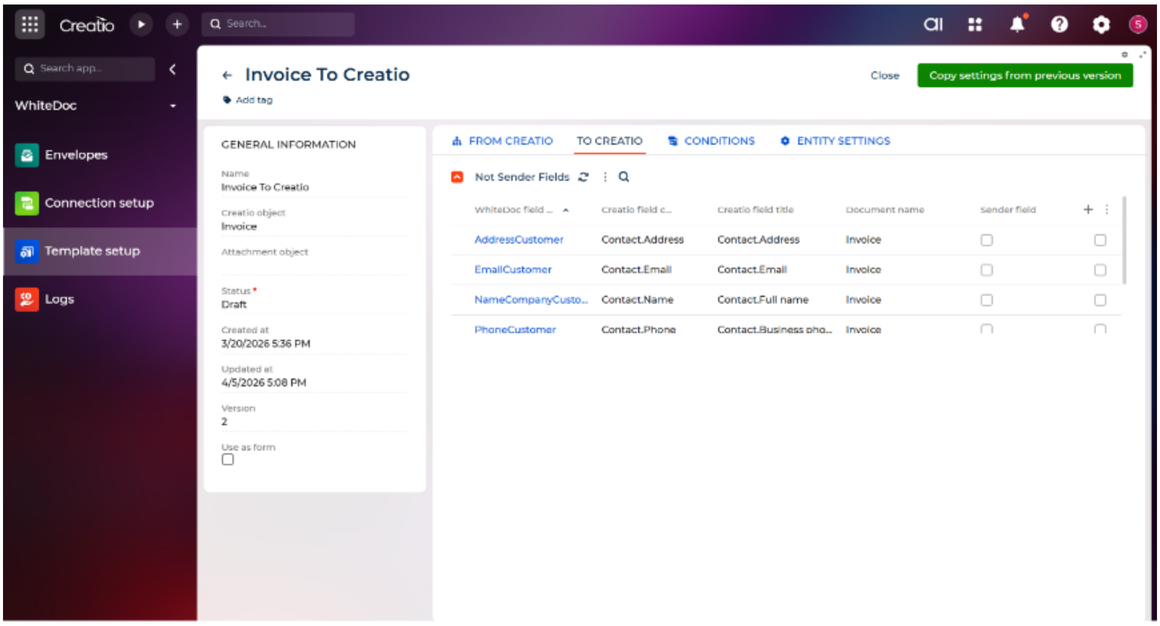
WhiteDoc field name	Creatio field code	Creatio field title	Document na...	Optional f
Invoice date	StartDate	Date	Invoice	☐
SiteOwner	Account.Web	Account.Web	Invoice	☐
Shipping			Invoice	☑
PhoneOwner	Account.Phone	Account.Primary pho...	Invoice	☐



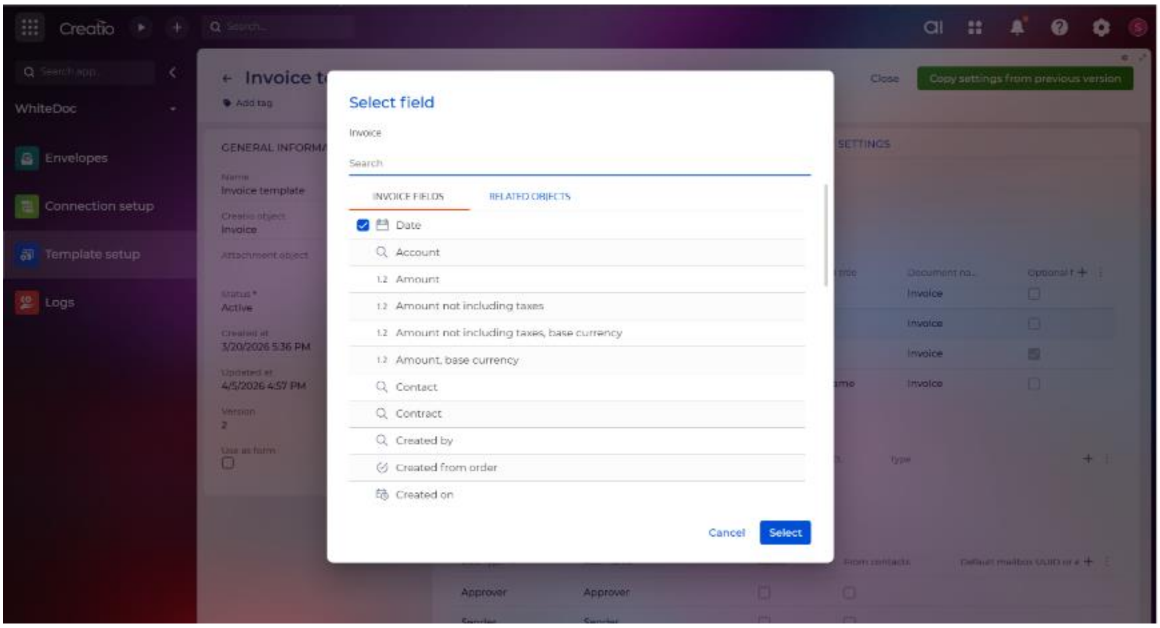
3.2. Field Mapping To Creatio (Reverse mapping)

Reverse mapping allows you to automatically update records in Creatio based on data entered or modified in a document during the signing process in DocStudio.

1. Go to **DocStudio → Template settings**
2. Select the required template and open the **Template** settings tab



3. Open the **"To Creatio" tab** — this section is used to map data from the document back to Creatio
4. In the **"Field mapping"** section, define the corresponding Creatio field for each element in the document template



5. **Technical Details:**
   - **Two-way synchronization:** data is automatically written back to Creatio after the envelope is completed or its status changes
   - **Related entity:** the system uses the object defined in the "Related entity" field to determine where the updated data should be stored

- **Mapping limitations:** reverse mapping is available for all roles in DocStudio templates except the Sender role

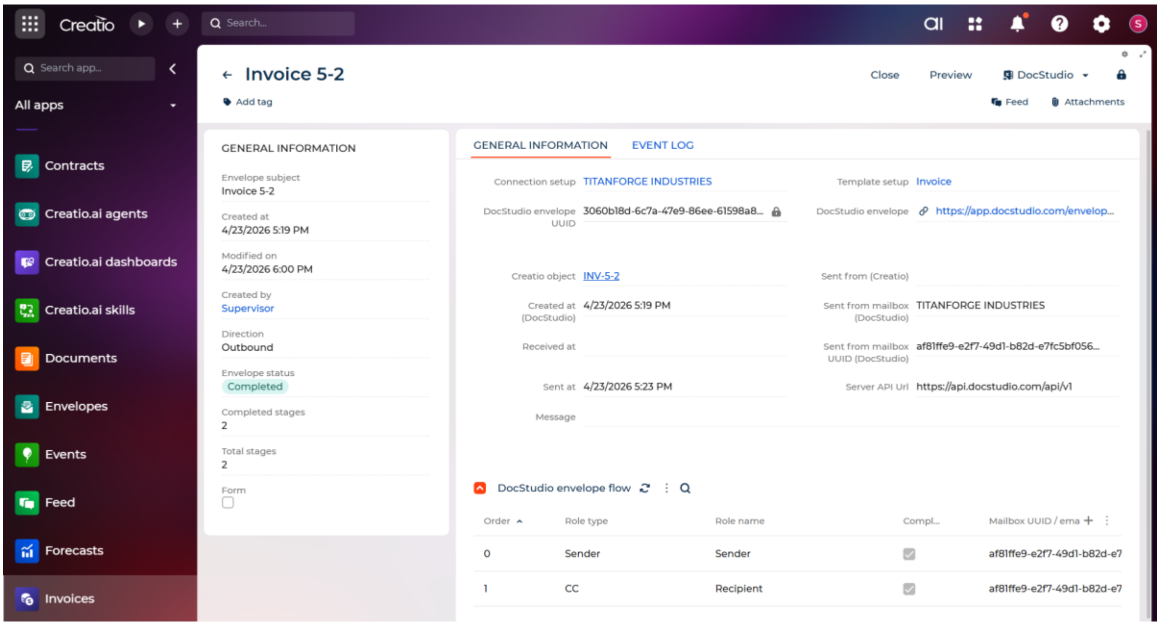
4. Actions with documents after sending and administration

After a document is sent, users can monitor its status and perform administrative actions directly within Creatio, without needing to switch to DocStudio.

4.1 Monitoring and updating statuses (Automatically and Manually)

All sent documents are displayed in the “DocStudio envelopes” detail in the record card.

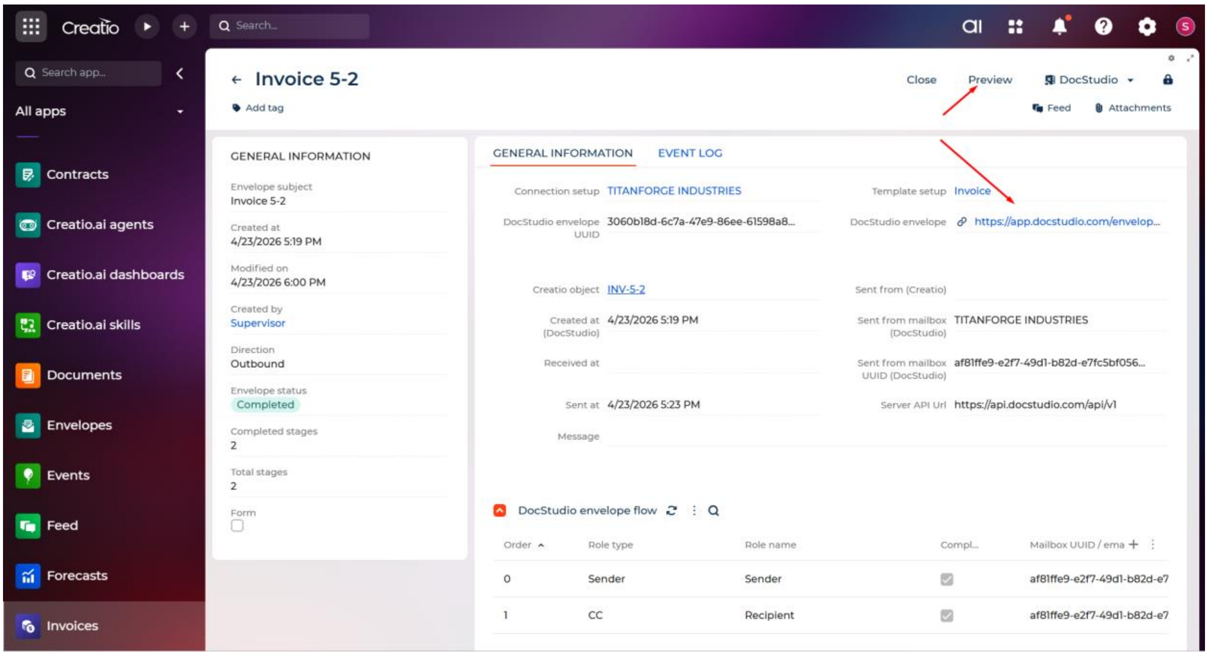
- You can view the current status (e.g., Sent, Waiting, Completed). If the webhook has not been triggered, click **“Update status”** to manually synchronize the envelope status.



- **CallBack (WebHook):** Provides automatic status updates in the system in real time without user involvement.

4.2 Preview via Preview (iFrame)

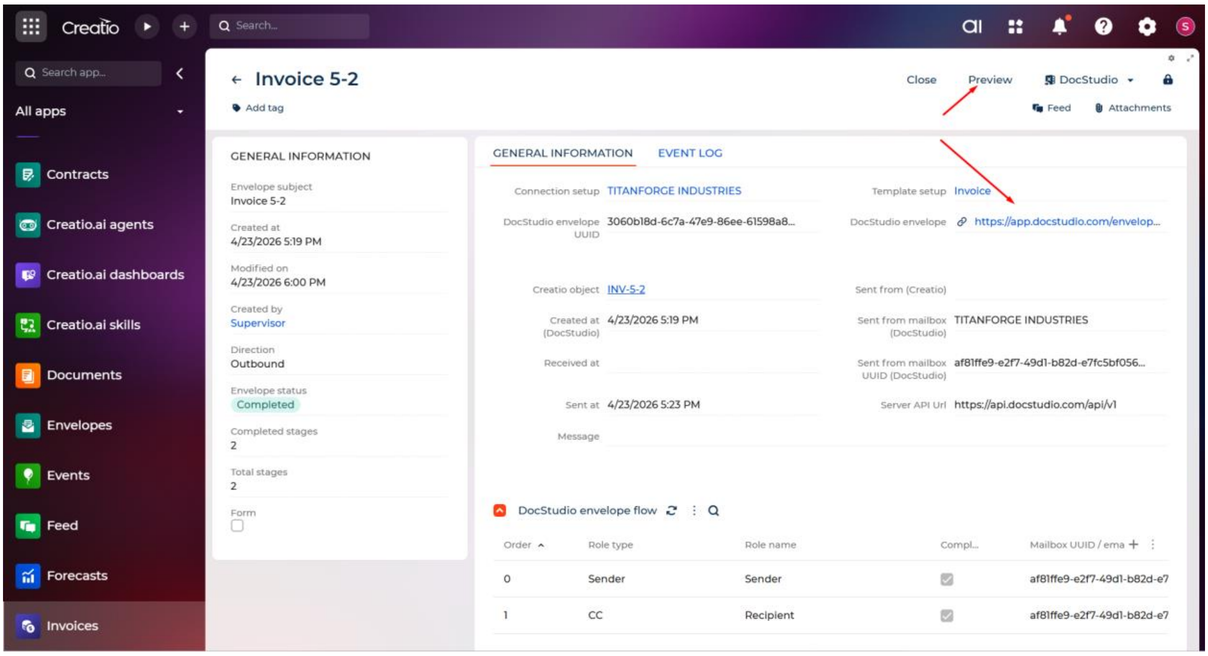
Click the **“Preview”** button in the envelope row. The document will open in an embedded window directly in Creatio.



You can check the content of filled fields or view applied signatures without going to the DocStudio website. Additionally, you can go to DocStudio to view all sent or received documents.

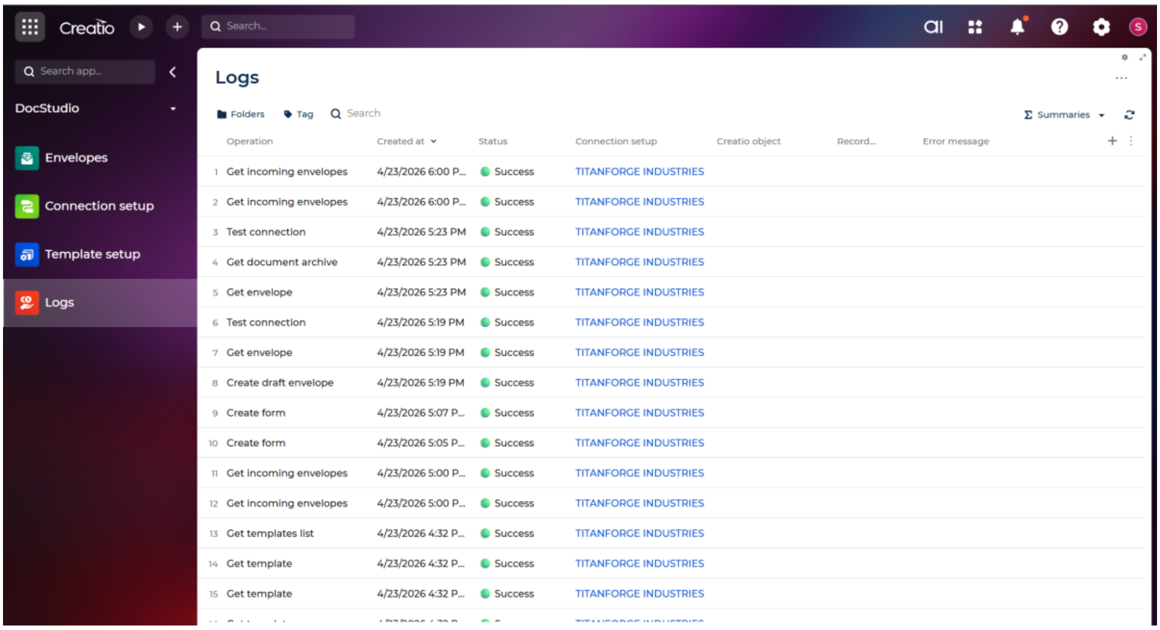
4.3 Document cancellation (Cancel)

If you find an error after sending, select the envelope and click the **Cancel** button. The signing process will be stopped on the DocStudio side, and the document will receive the **“Cancelled”** status.

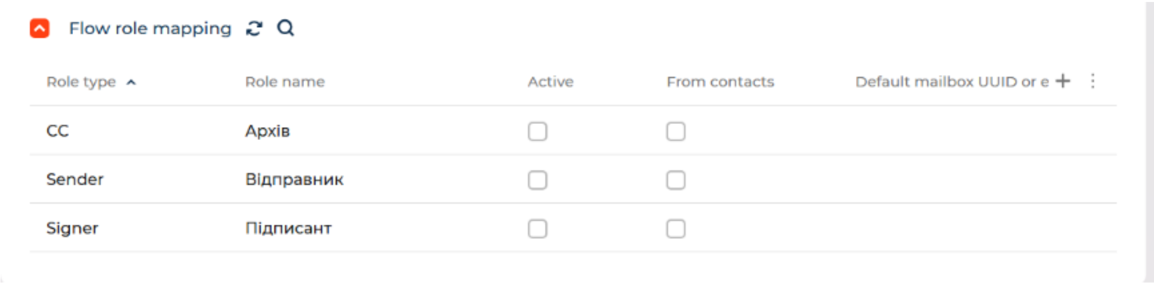


4.4 Administration and Event Log

- **Event Log (Logs):** All system messages about successful operations or integration errors (for example, authorization error or lack of access to files) are recorded here.



- **Processing roles (Flow role entry):** Allows the administrator to assign specific mailboxes to roles in the template to automate sending documents to the required signers.



- **Status directory:** In the **“DocStudio".** Envelope status” directory, you can flexibly configure at which statuses (for example, only Completed) the system should upload the final file to Creatio attachments.

☑ Your Creatio system is now ready for a full document workflow with DocStudio.

All actions are configured, mapping is set up, and monitoring tools are in place. You can now create, send, track, and manage documents end-to-end directly within Creatio.

4.5 Full list of application processes

Process name	**Description**
DocStudio. Actualize Templates by current connection	Designed to retrieve and update templates of the current user
DocStudio. Actualize Templates by all connections	Designed to retrieve and update templates across all active connections
DocStudio. Quick send Envelope	Process responsible for quick sending from attachments of the current record from which the business process is launched
DocStudio. Create Envelope and send	Designed to create and send an Envelope
DocStudio. Get Envelopes	Designed to retrieve envelopes associated with the current user’s mailbox
DocStudio. Get Envelopes by all connections	Designed to retrieve all envelopes associated with active DocStudio connections

DocStudio. Copy Template setting from previous version	Process for copying template settings from a previous version
DocStudio. Read Entity from cache	Process for retrieving entity information from Redis cache
DocStudio. Check and get Envelope data	Process for validating filled data before sending the Envelope
DocStudio. Update Envelope status	Process for updating the Envelope status
DocStudio. Add webhook on Envelope status changed	Designed to add a webhook for envelope status changes
DocStudio. Cancel active Envelope by Entity	Designed to cancel an Envelope from the related entity
DocStudio. Cancel Envelope	Designed to cancel an Envelope
DocStudio. Copy Envelope files to master Entity	Process for copying Envelope files to the related entity
DocStudio. Get Envelope archive	Process for retrieving an archive of all Envelope documents and saving them to the Envelope detail
DocStudio. Get Envelope for print	Designed to retrieve printable forms (PDF) of all Envelope documents and save them to the Envelope detail
DocStudio. Get last final Envelope for print by Entity	Designed to retrieve the printable form for the latest Envelope by related entity
DocStudio. Update active Envelope status by Entity	Designed to update the status of the active Envelope by related entity