



Instructions for working with the WhiteDoc application in Creatio

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General information

This instruction is intended to describe the operation and configuration of the WhiteDoc application in the Creatio system.

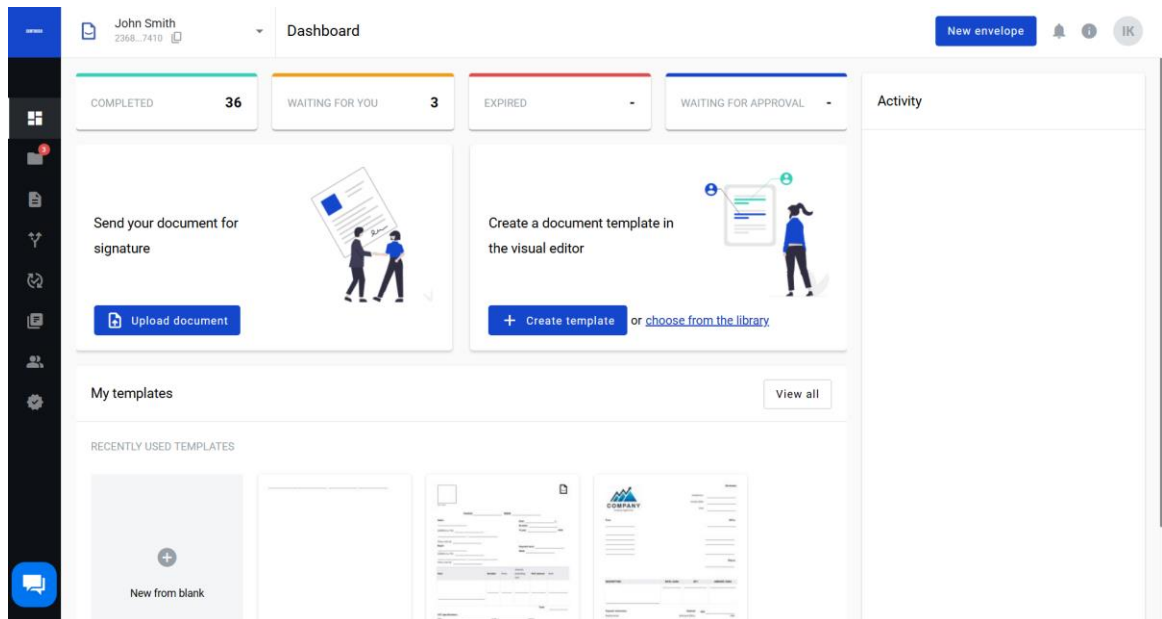
For correct document exchange between WhiteDoc and Creatio, it is necessary to:

- Register in WhiteDoc:
<https://edo.whitedoc.ua/auth/registration>
- Install the application from the Creatio marketplace:
<https://marketplace.creatio.com/app/whitedoc>
- Configure the connection between Creatio and WhiteDoc – section “Connection setup”
- Configure the application actions for the required document section in Creatio

1. Installation and configuration of the application

.1. Registration in WhiteDoc

1. Go to the registration page <https://edo.whitedoc.ua/auth/registration> and click “Create account”.
2. Enter your email address and click the button to receive the code.
3. Receive the confirmation code via email and enter it in the corresponding field.
4. Select the account type:
 - Personal
 - Company account
5. Fill in the required data and click “Create account”.
6. After completion, you will automatically enter the system — the account has been created.



✓ As a result, the user gains access to the WhiteDoc electronic document management platform, which allows creating, approving, and signing documents online.

.2. Installing the application in Creatio

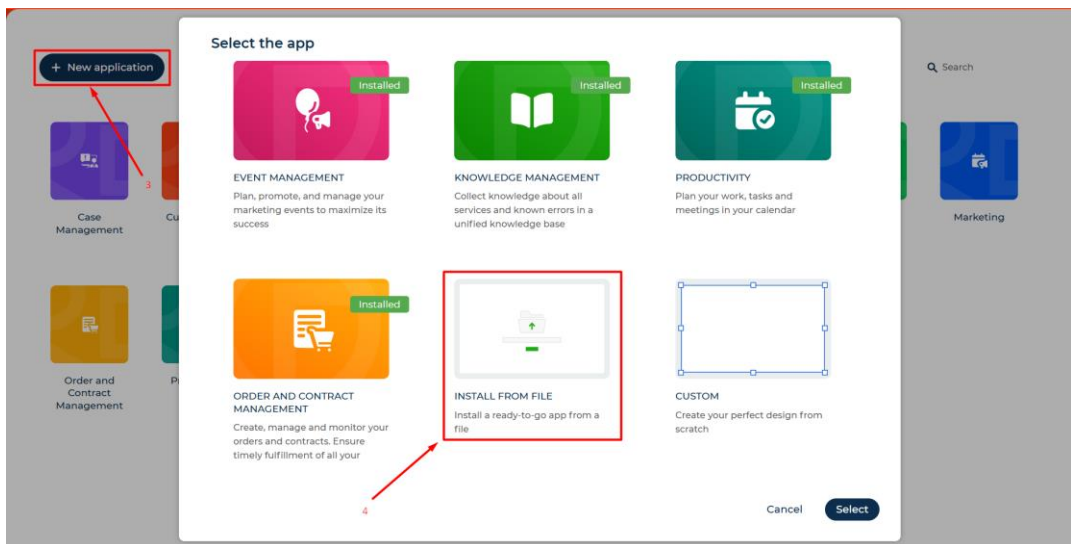
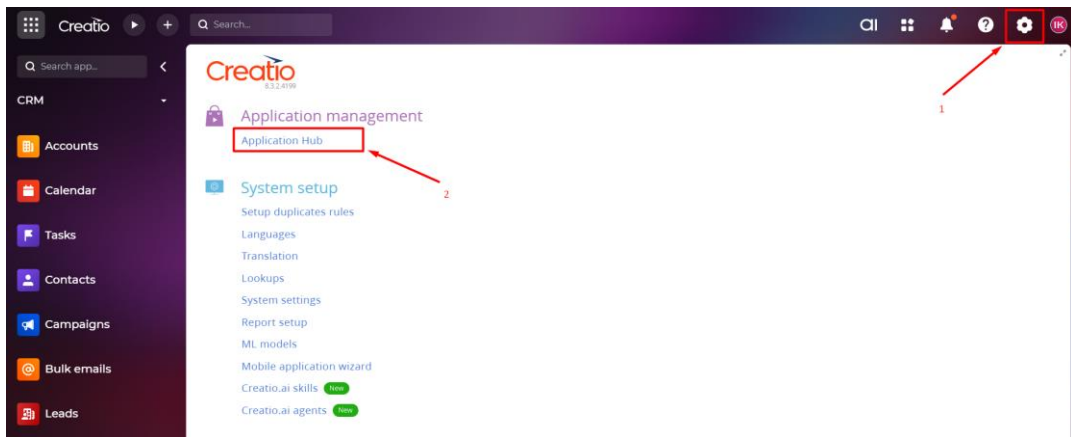
Since automatic installation from the Marketplace is not available, the installation is performed through a partner.

🔗 Application page:

<https://marketplace.creatio.com/app/whitedoc>

How the installation process works:

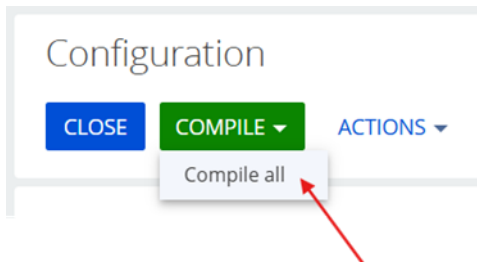
1. Go to the application page and submit a request via the “Contact partner” button.
2. After that, a representative of Centredo will contact you to уточнить details.
3. After agreement, Centredo specialists:
 - prepare the solution
 - provide the application file (installation package)
4. The received file must be installed in Creatio via the “Application installation” / “Application Hub” section.



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

⚠ Note: after installation, it is recommended to run system compilation:

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



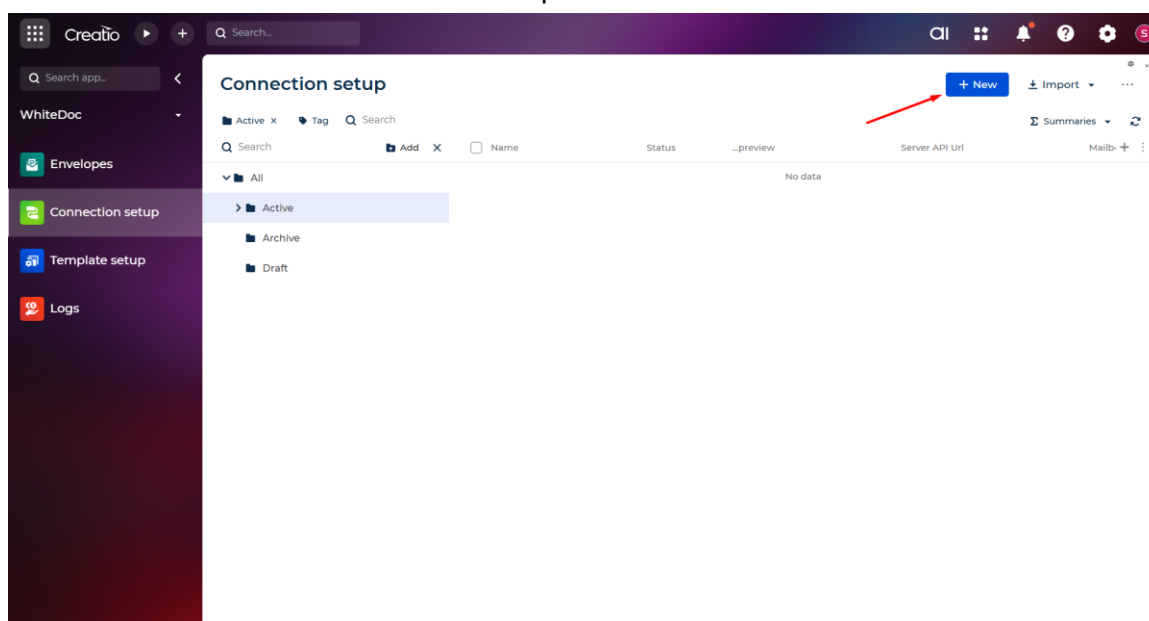
4. After successful installation, a new workplace “WhiteDoc” with a list of application sections will appear on the workplace panel.

.3. Setting up the connection to WhiteDoc

After installing the application, it is necessary to perform the basic configuration of the connection to the WhiteDoc service.

Configuration steps:

1. Go to the WhiteDoc → Connection setup in Creatio.



2. Click the “+ New” button to create a new connection.
3. In the opened form, fill in the fields:
 - Name — arbitrary connection name
 - Token — API token obtained in WhiteDoc

i Note: Before filling in this field, you need to create an API token in WhiteDoc: <https://edo.whitedoc.ua/profile?activeTab=application-tokens>

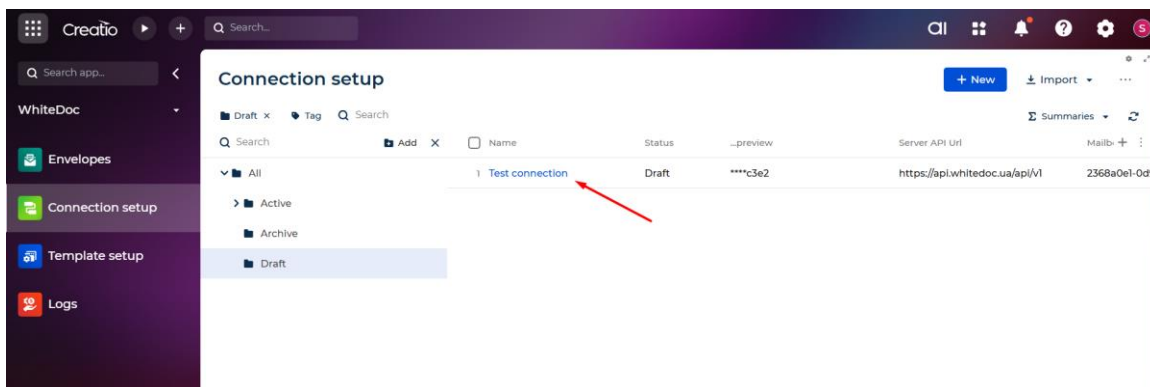
- Mailbox — mailbox (automatically populated after loading)

4. After entering the token, click the “Load mailboxes” button to load available mailboxes.

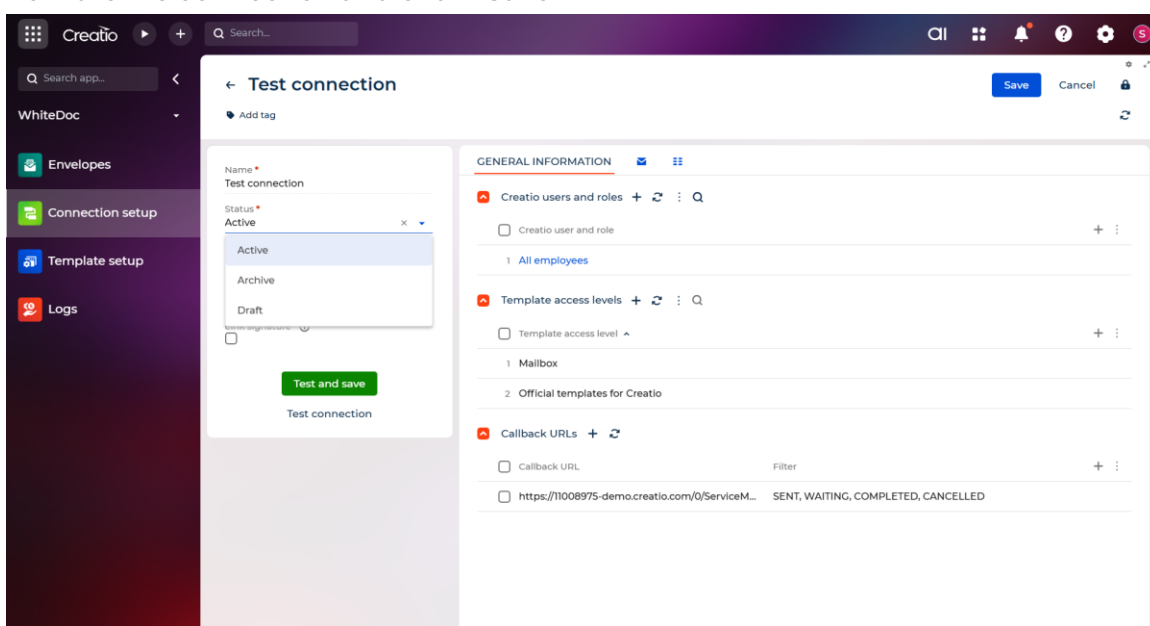
5. Select the required mailbox in the Mailbox field.

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”.



After that, the connection will be created, and the system is ready for further work with documents

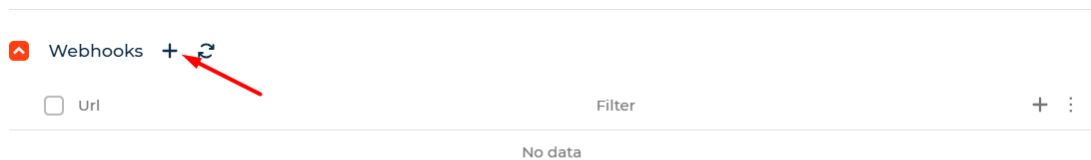
.3.1. Additional settings

After creating the connection, advanced features are available for more flexible work with Creatio and WhiteDoc.

Available settings:

1. Callback setup (webhooks)

You can automatically configure a callback from WhiteDoc by clicking the “+” button. This allows the system to receive document status updates in real time.



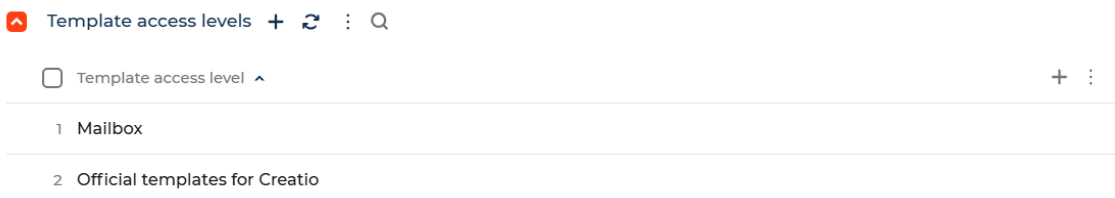
2. User access configuration

It is possible to define which users have access to a specific connection. This helps control document handling and increases security.



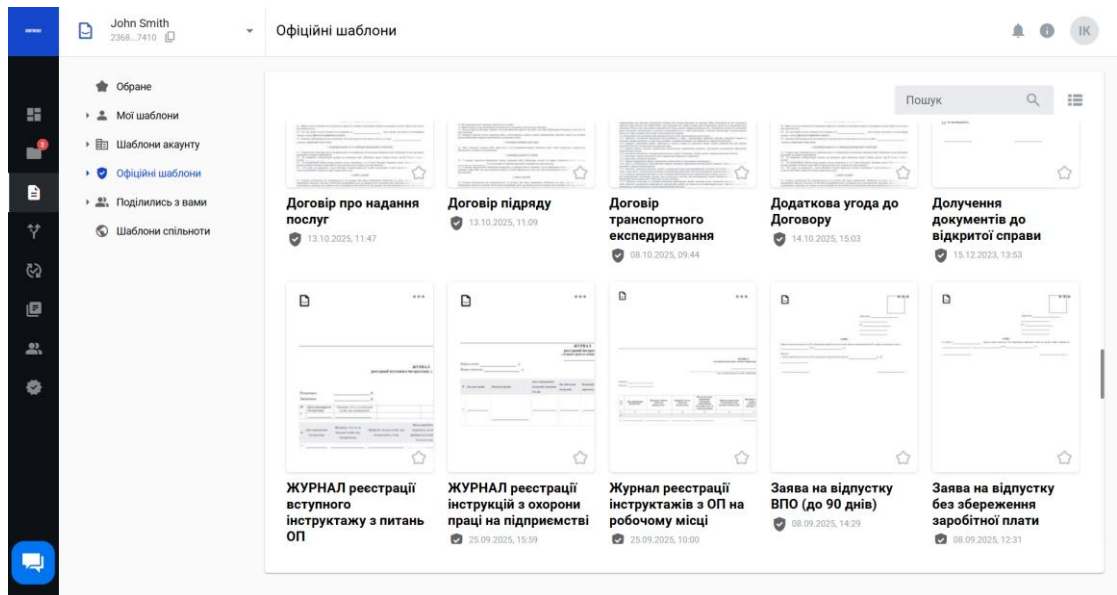
3. Access to WhiteDoc template folders

You can restrict or grant access to specific folders with document templates in WhiteDoc. This is convenient for distributing templates between departments or roles.



At the same time:

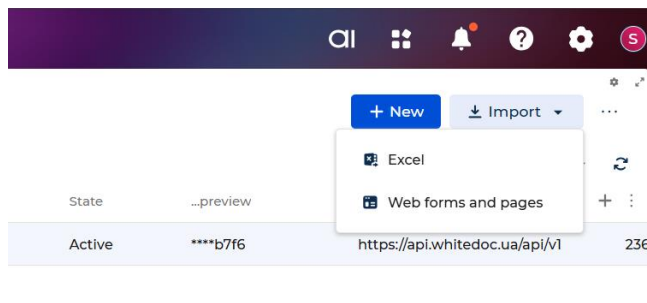
- a folder “Creatio” is automatically created
- this folder contains official templates provided by WhiteDoc
- these templates can be used as a basis for work or adapted to your business processes



4. Importing connections from CSV

It is possible to import connections via a CSV file. This allows you to:

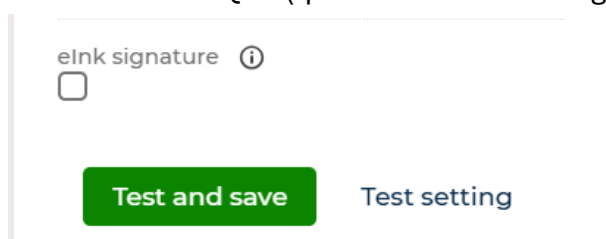
- mass create connections
- quickly distribute user access to documents
- avoid manual creation of a large number of records
- centralized connection management



5. eInk signature (QuickSend) configuration

The eInk signature checkbox defines the type of signature used in the QuickSend functionality.

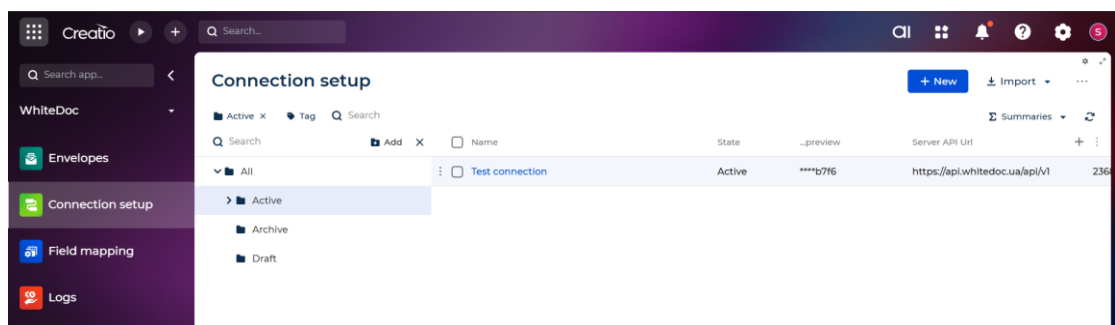
- If enabled — an eInk signature is automatically added to documents
- If disabled — a QES (qualified electronic signature) is used by default



i Note: It is recommended to align the signature type with your company's legal requirements before using QuickSend.

6. All created connections are displayed in the list, where you can:

- edit settings
- update tokens
- monitor the connection status



.4. Configuring application operation in the Creatio

After connecting to WhiteDoc, it is necessary to configure the application operation directly in the Creatio system according to the company's business processes. This stage includes integration of WhiteDoc functionality into existing system sections and preparation of the user scenario for working with documents.

Integration with Creatio allows configuring WhiteDoc operation at the level of individual system records.

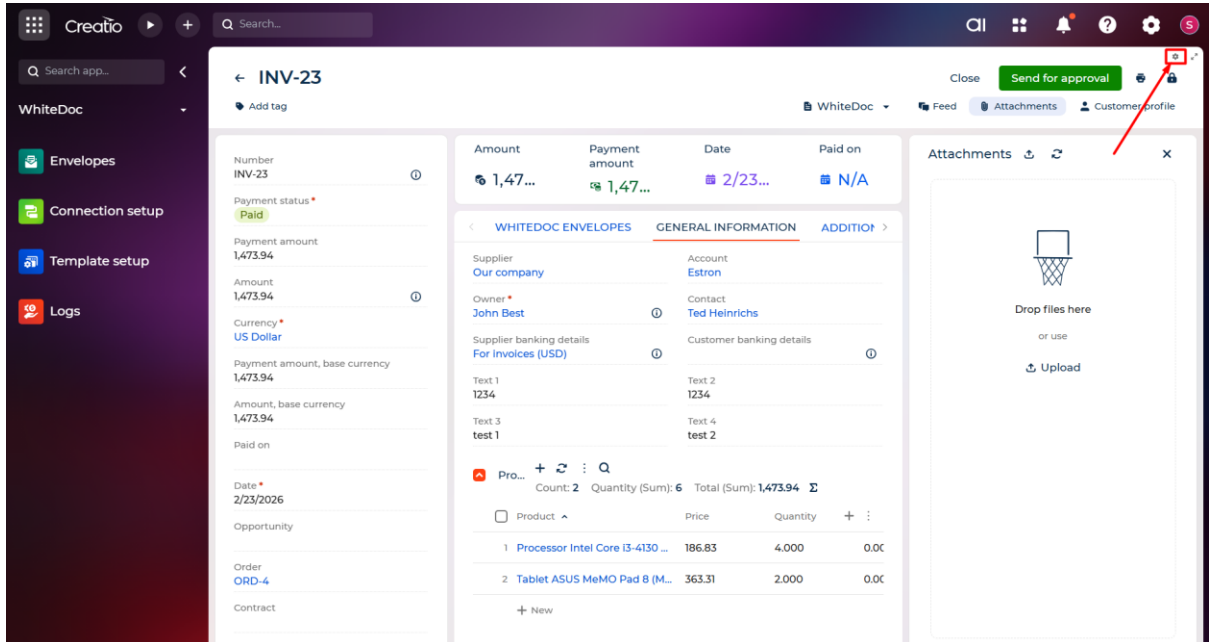
This means that:

- the sending logic (processes, buttons, scenarios) can be adapted to a specific object or record type
- different document templates can be used for each record (deals, documents, accounts, etc.)
- the set of fields to be filled can differ depending on the record data
- conditions for applying templates (filters) can be configured

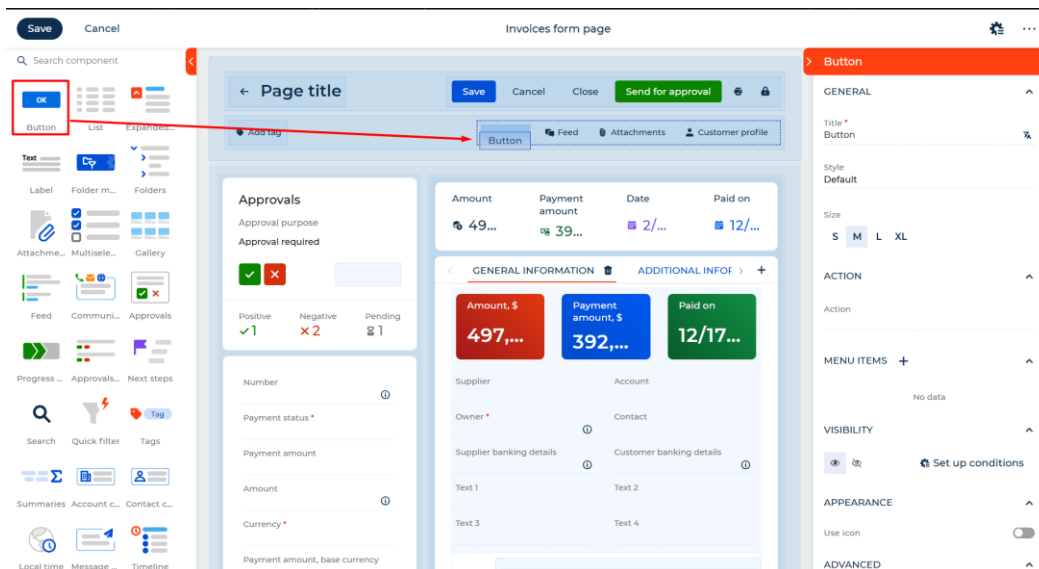
.4.1. Adding actions (buttons) to sections

To work with document records in Creatio, it is necessary to add the corresponding actions to record pages.

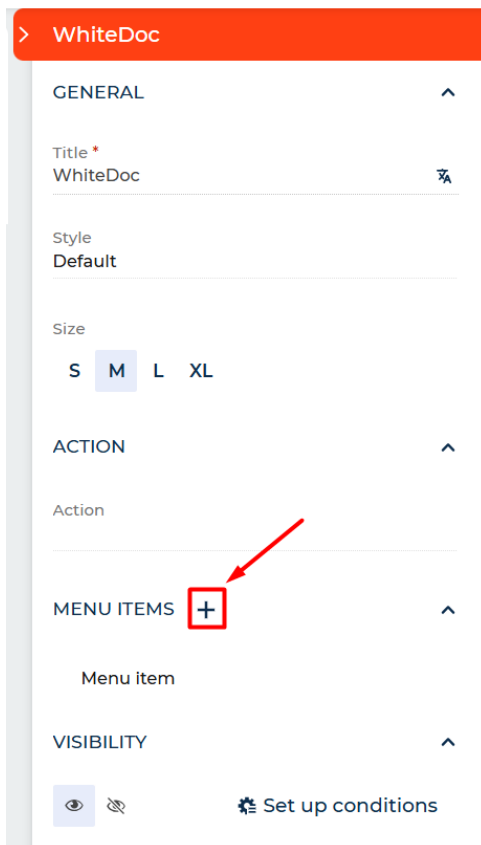
1. For example, select the Invoice record page. Go to System Designer.



2. In the System Designer, add a Button, which will be responsible for the Action from WhiteDoc.

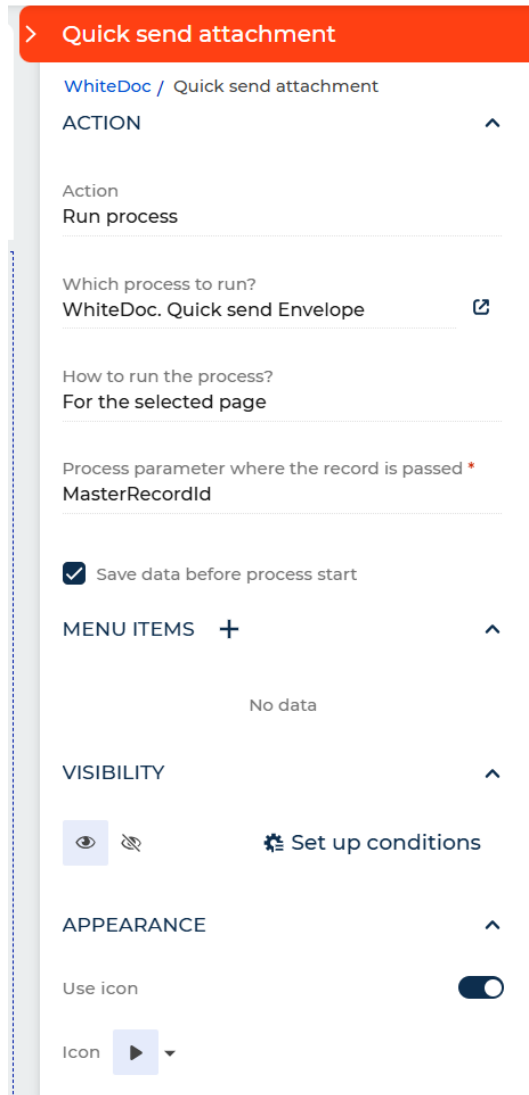


3. Configure Menu items to enable selection of multiple actions from WhiteDoc.



4. Configure the Action, for example Quick send attachment. List of settings:

- Title — arbitrary action name
- Action — select in search: Run process
- Which process to run? — select in search: WhiteDoc. Quick send Envelope
- How to run the process? — select in search: For the selected page
- Icon — optionally select a process icon

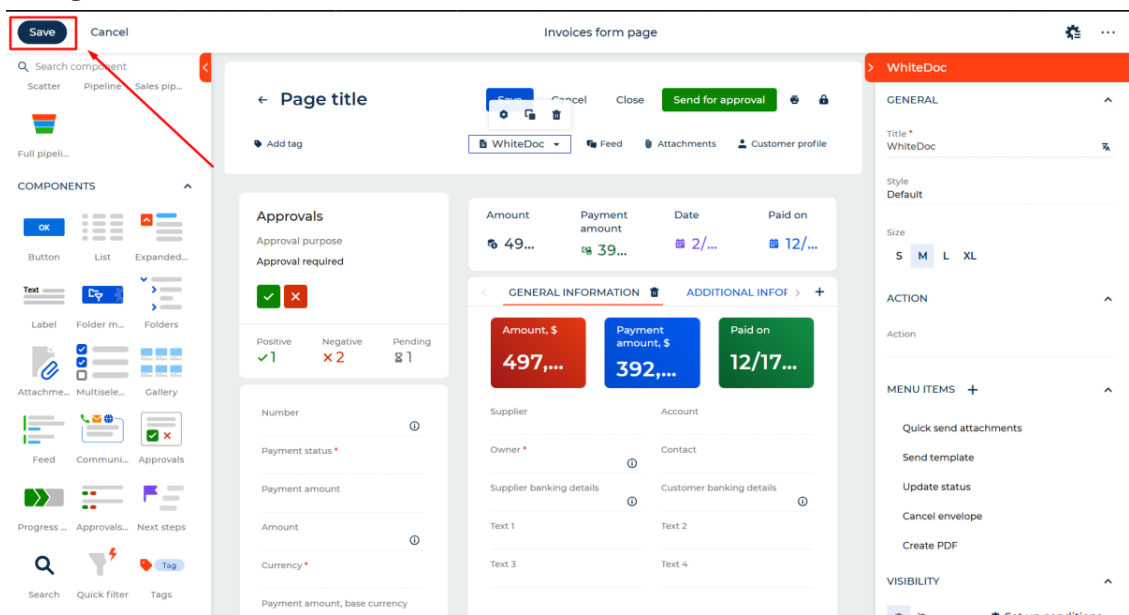


5. Main processes for working with documents and their names for search. The full list of Actions is provided in the additional materials.

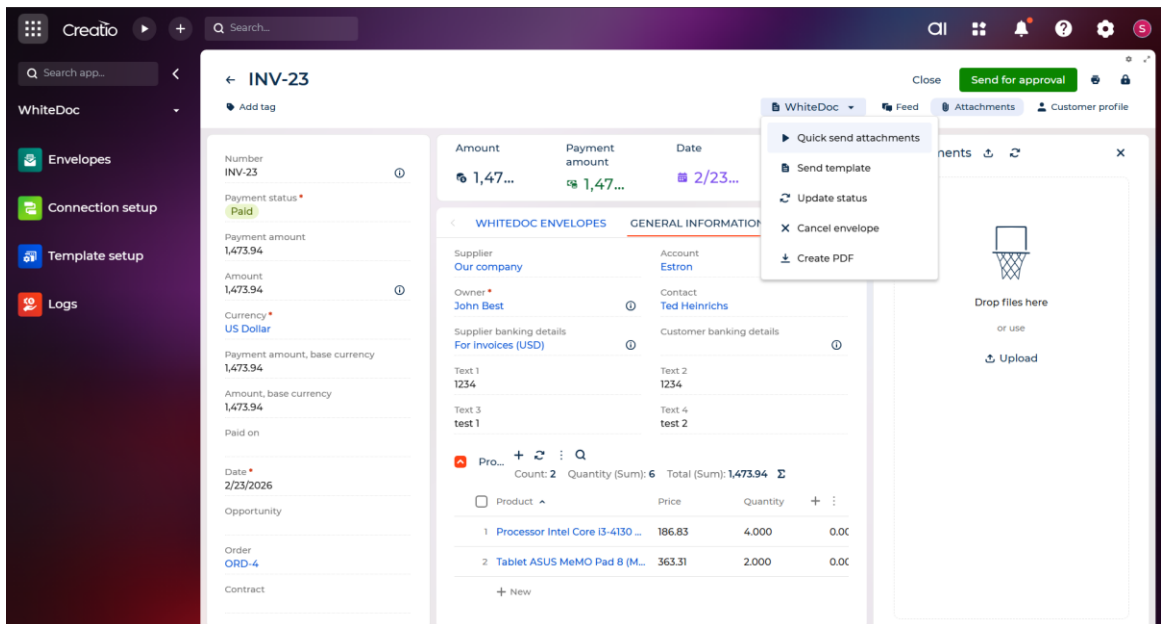
Process name	Process description
WhiteDoc. Quick send Envelope	A process responsible for quick sending from attachments of the current record from which the business process is launched
WhiteDoc. Create Envelope and send	Designed to create and send an Envelope based on a configured template in WhiteDoc
WhiteDoc. Update Envelope status	Process for updating the Envelope status

WhiteDoc. Cancel Envelope	Designed to cancel an Envelope
WhiteDoc. Get Envelope archive	Process for obtaining an archive of all documents of the Envelope and saving them to the Envelope detail
WhiteDoc. Get Envelope for print	Designed to obtain printable forms (PDF) of all documents of the Envelope and save them to the Envelope detail

6. After configuration, it is **обязательно** necessary to save the page in the System Designer.



7. Перелік дій з WhiteDoc додані до сторінки і поєднані із записами InvoiceThe list of WhiteDoc actions has been added to the page and linked to Invoice records.



.4.2. Adding a list of sent documents and their status

For convenient control of document workflow in Creatio, it is recommended to configure the display of the list of sent documents and their statuses directly in system records.

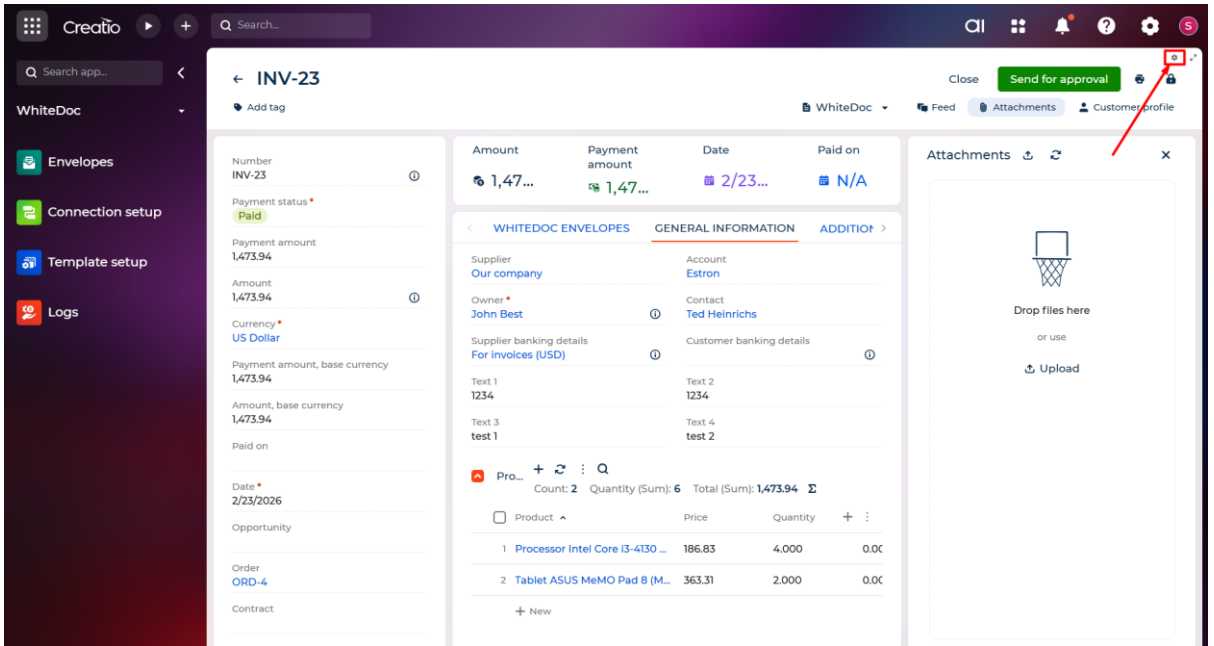
In each record (for example: document, deal, account), you can display related WhiteDoc envelopes.

This allows you to:

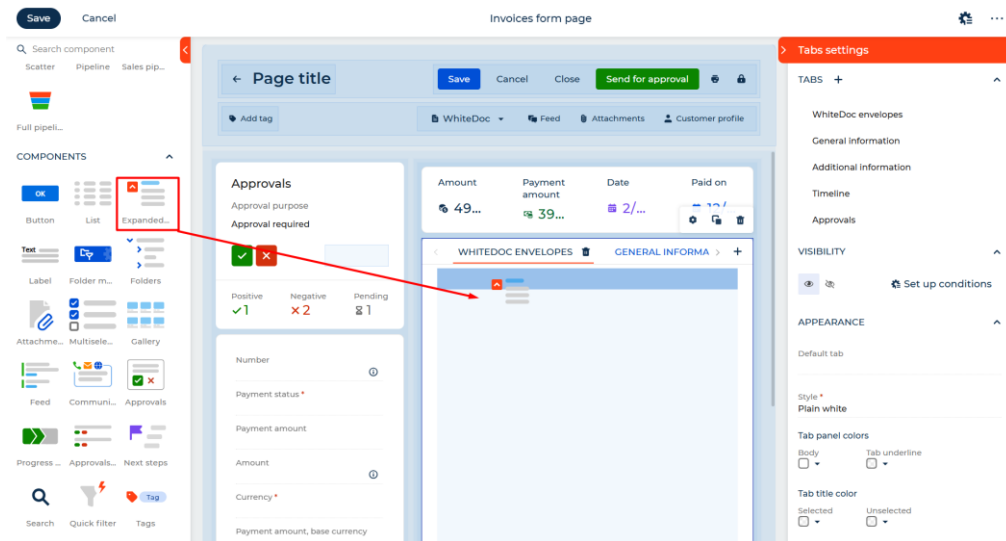
- see the document status (sent, signed, rejected, etc.)
- view the sending history
- access files and signing results

👉 All information is available directly in the record card without navigating to other sections.

1. For example, select the Invoice record page. Go to System Designer.



2. In the System Designer, add an Expanded list, which will be responsible for displaying the list of documents from WhiteDoc.



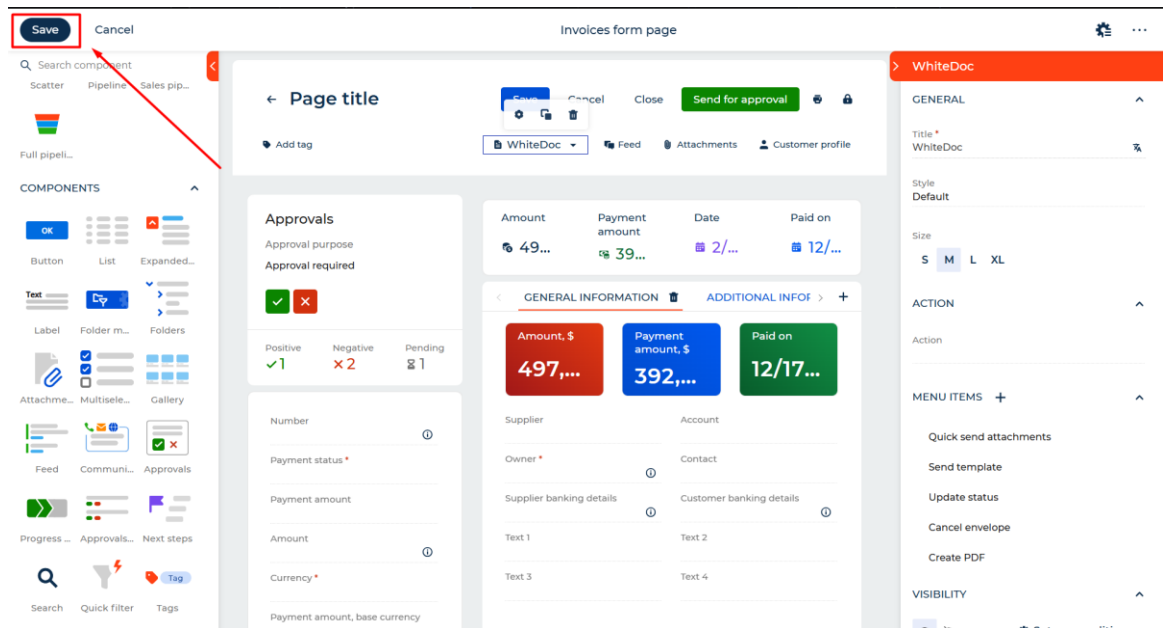
3. Click on the placed Expanded list to open the settings.

The screenshot shows a software interface with a list of 'WhiteDoc envelopes'. The list is currently empty, displaying 'No data'. The settings panel is open on the right, showing the 'List settings' for 'WhiteDoc envelopes'. The settings are categorized into 'GENERAL' and 'APPEARANCE'. Under 'GENERAL', the 'Object' is set to 'Invoice', and there is a note that 'Invoice has 1 form page'. There are options to 'Apply filter by page data' and 'Apply pre-configured filter'. A filter element is currently set to 'Search | GridDetailSearch...'. Under 'APPEARANCE', several options are checked: 'List header', 'Draggable columns', 'Resizable columns', 'Sorting', 'Inline editing', 'Inline adding records', 'Floating edit panel', and 'Row numbers'.

4. Configure the list filter:

- Object — select in search: WhiteDoc envelope
- Apply filter by page data — add a filter
 - Invoice — select id
 - WhiteDoc — select Entity record id
- Leave the rest unchanged


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



6. The list of documents has been added to the page and linked to Invoice records.

Congratulations! At this stage, the technical setup of the WhiteDoc application is complete. After you have added all the necessary buttons (Actions) and configured the display of the envelope list (Expanded list),

Creatio interface is now fully integrated with the WhiteDoc platform. You can navigate to any record (for example, an Invoice or a Contract), where all configured actions will be available in the WhiteDoc button menu. Thanks to the activated connection and integrated processes, the system is fully ready for quick sending of attachments, use of templates, and real-time tracking of signing statuses.

To get started, simply open a record card and select the desired scenario: “Send” to generate a document from a template or “Quick send” for instant signing of already uploaded files. Your business processes are now officially becoming digital, transparent, and automated 

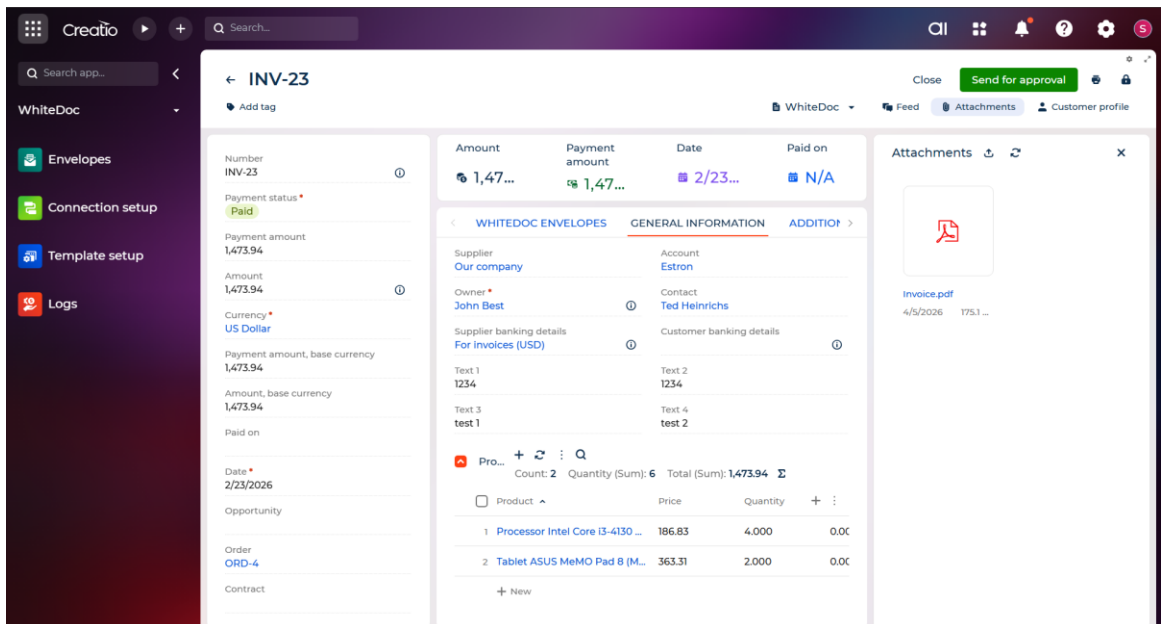
Working with documents

After completing the basic connection setup, the system is ready for data exchange. WhiteDoc offers three main working scenarios, each suitable for different business tasks in Creatio:

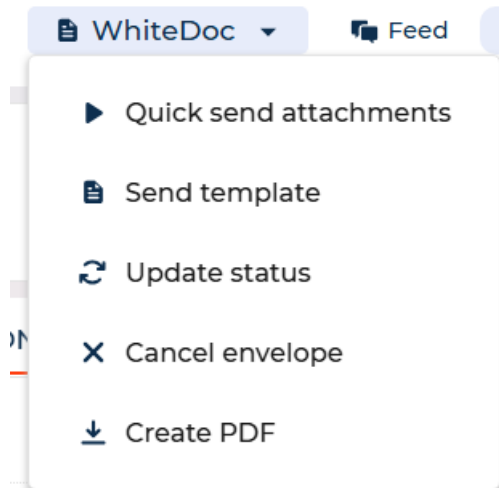
.1. Quick sending of attachments (Quick Send)

This scenario is used when you already have a ready file (for example, a generated invoice or report in PDF) that only needs to be signed.

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

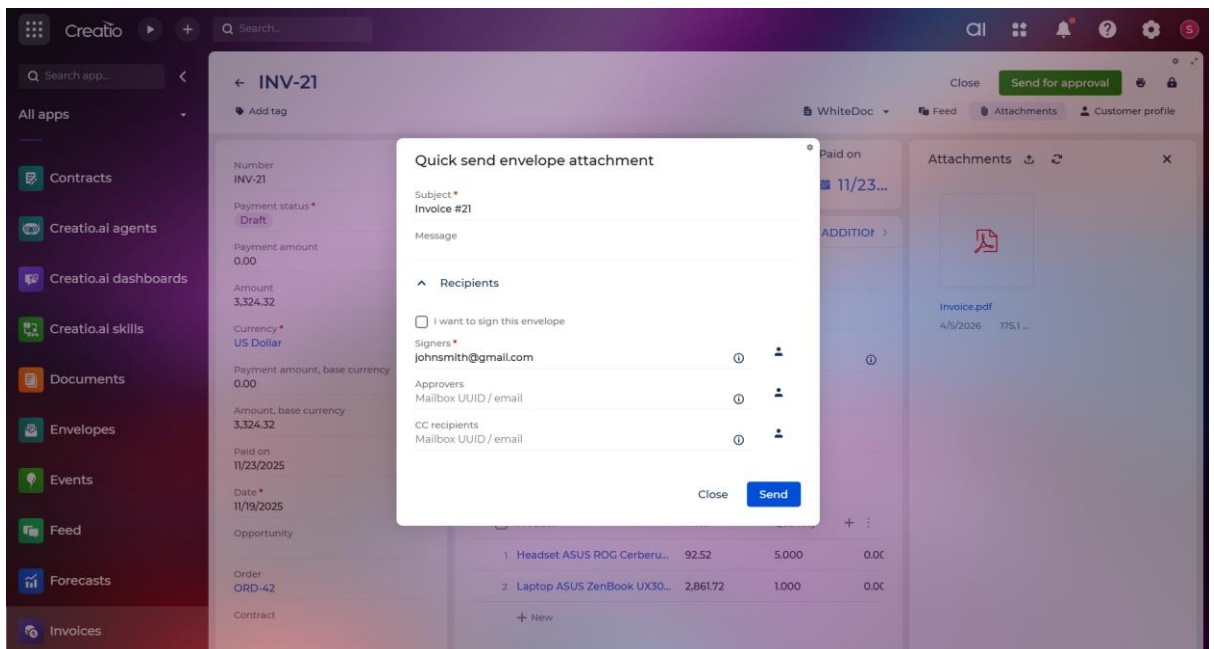


3. Click the WhiteDoc → Quick send button (or whatever you named this button during setup).



4. **Filling in sending parameters (Quick send envelope attachment).** In this window, you need to specify:

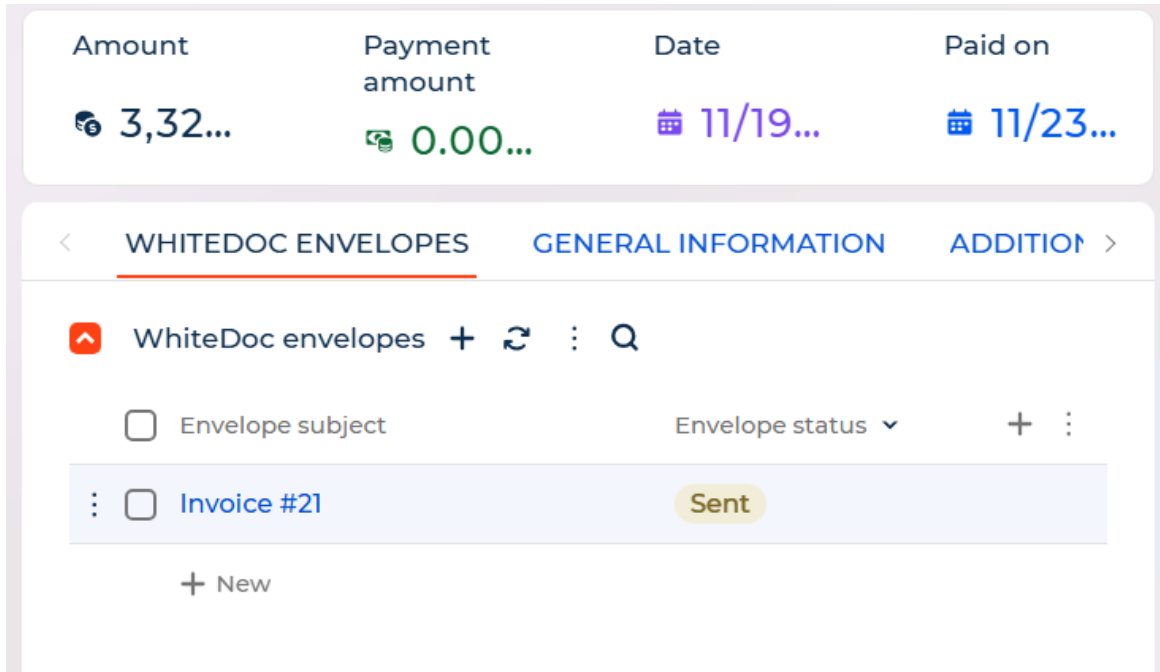
- a. Subject: Set the envelope title that the recipient will see.
- b. Message: The text of the accompanying email.
- c. Recipients: Select from Creatio contacts, or specify the mailbox UUID, or email for each participant (for example, Client or Director). Recipients can also be filled in automatically; this needs to be configured in the Template settings section.



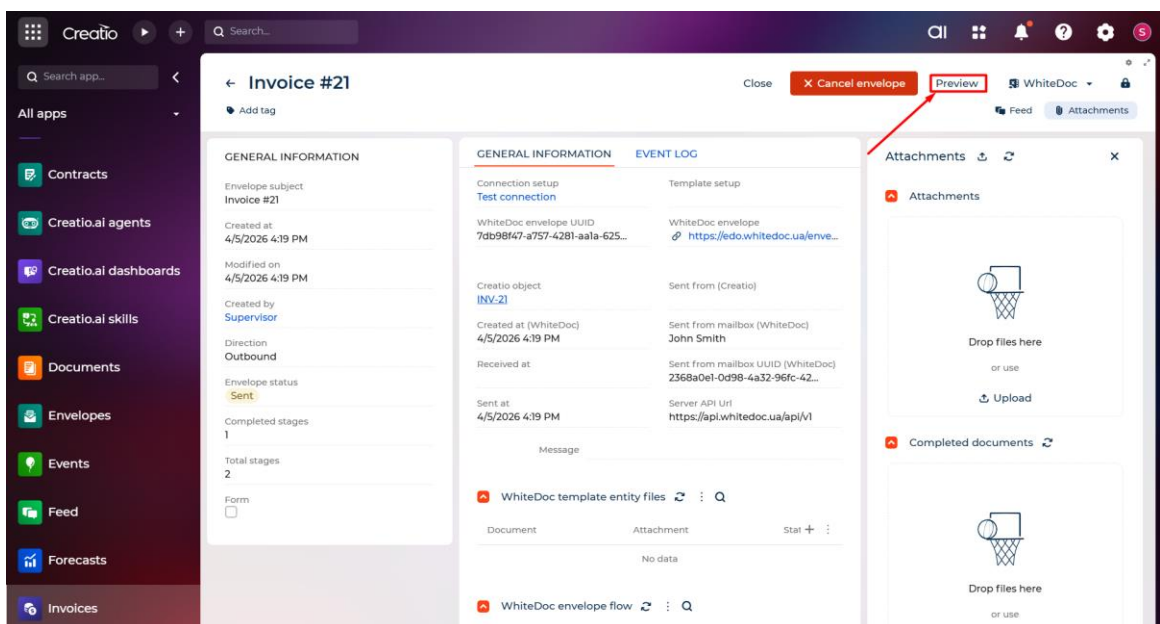
5. The system will instantly create an envelope in WhiteDoc and send it to the recipient.

6. **Sending result:**

A new record is automatically added to the “WhiteDoc envelopes” detail.

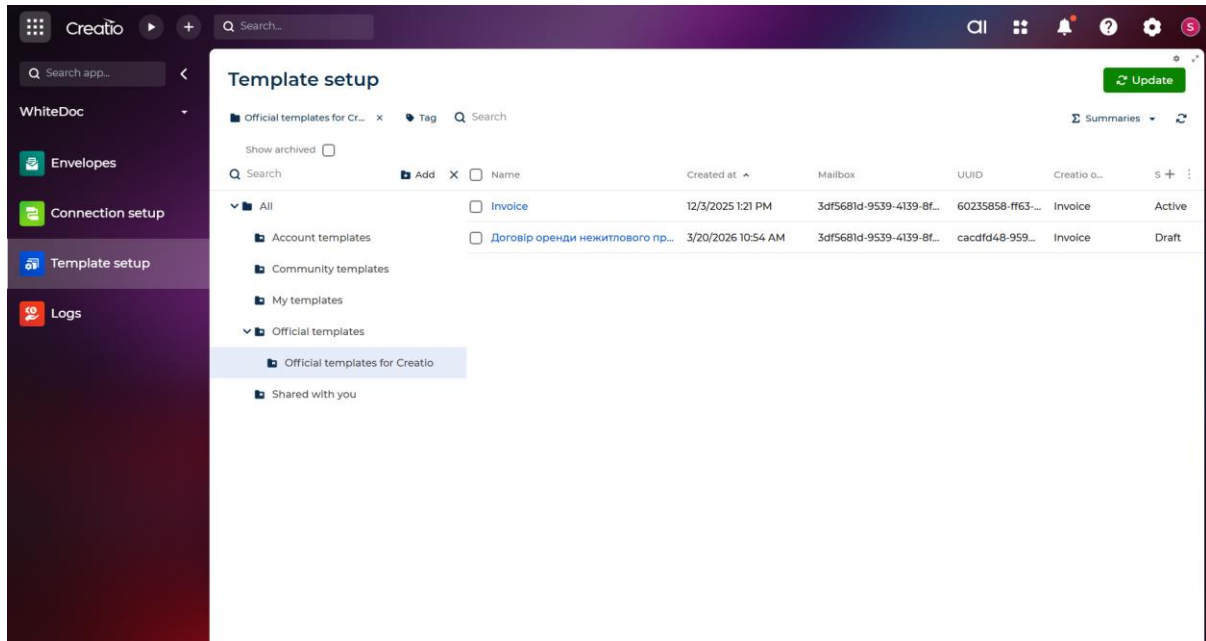


You can click the “Preview” button to view the document content directly in the Creatio interface (via iframe), or open it in the full WhiteDoc window for detailed analysis.



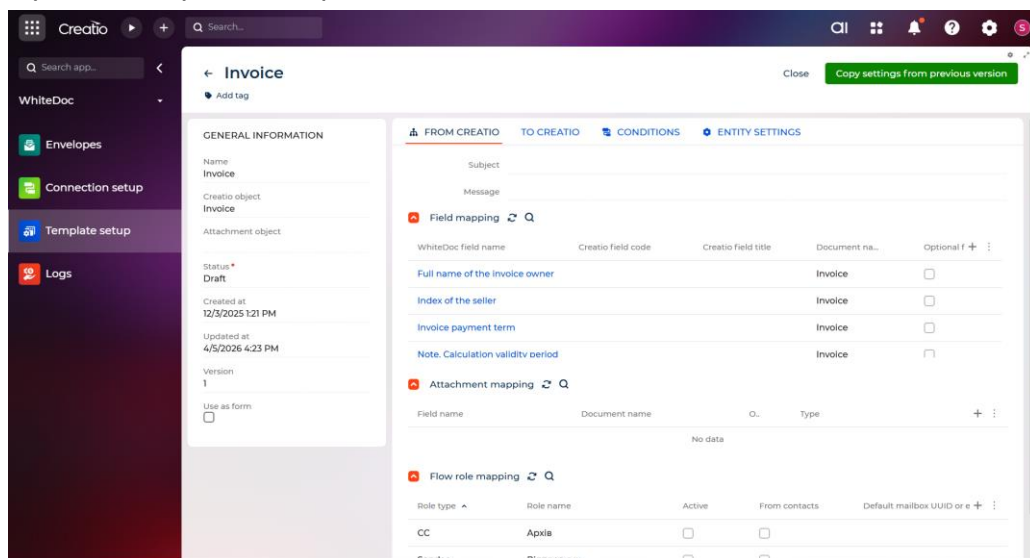
.2. Sending ready-made forms (Forms)

This scenario allows using ready-made WhiteDoc templates as interactive forms. It is ideal for cases when you need to quickly send a document, but some of the data is not filled in Creatio or field mapping is not yet configured.

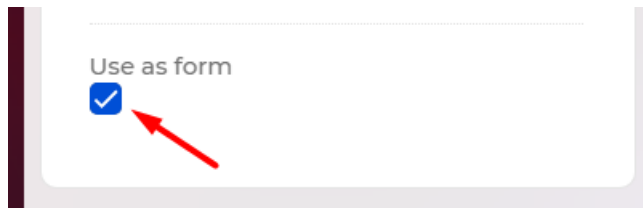


In order for a document template to open as an interactive form for manual completion, it must be pre-configured.

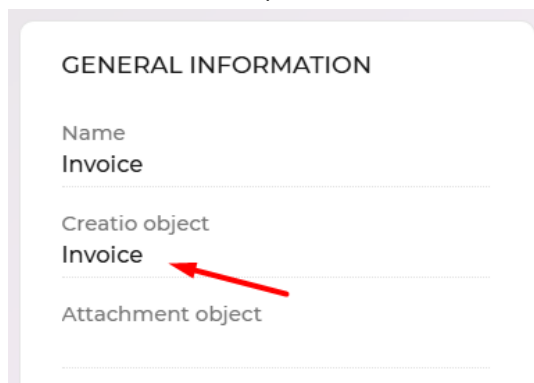
1. Go to the WhiteDoc → Template settings section.
2. Open the required template available in WhiteDoc.



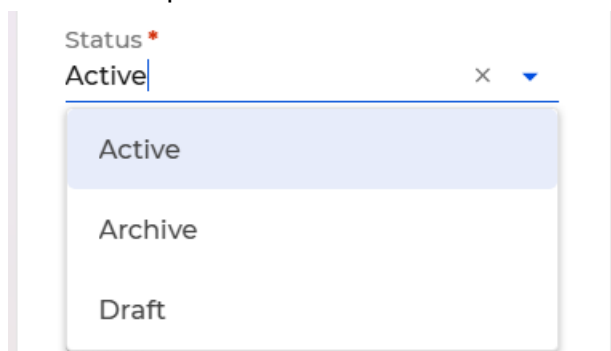
3. In the template card, check the “Use as form” checkbox (this activates interactive filling mode).



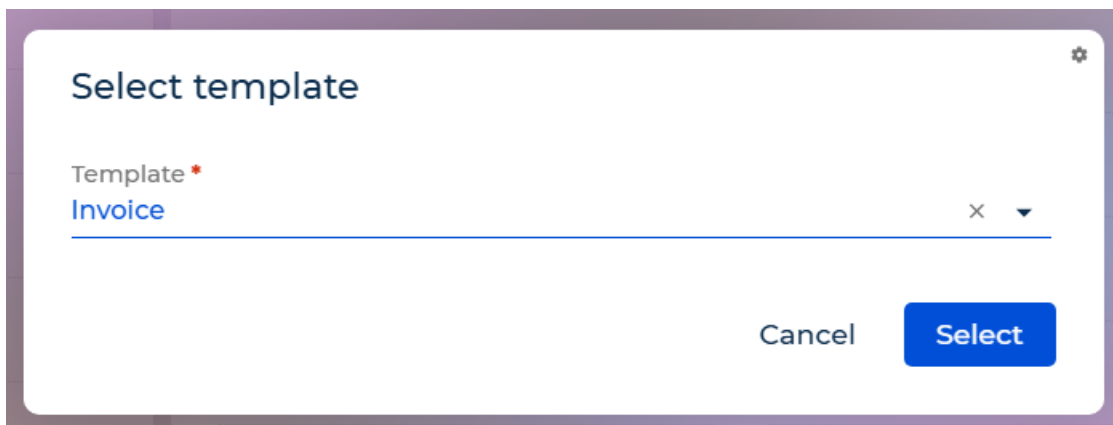
4. In the “Related entity” (Creatio object) field, select a Creatio object (for example, Invoice or Account) from which data will be pulled.

A screenshot of the "GENERAL INFORMATION" section of a template card. It contains three fields: "Name" with the value "Invoice", "Creatio object" with the value "Invoice", and "Attachment object". A red arrow points to the "Invoice" value in the "Creatio object" field.

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

A screenshot of a dropdown menu for the "Status" field. The menu is open, showing three options: "Active", "Archive", and "Draft". The "Active" option is selected and highlighted in blue. The text "Status*" is visible above the dropdown, and "Active" is entered in the input field.

6. Click the WhiteDoc → Send button and select the template configured as a form.



Select template

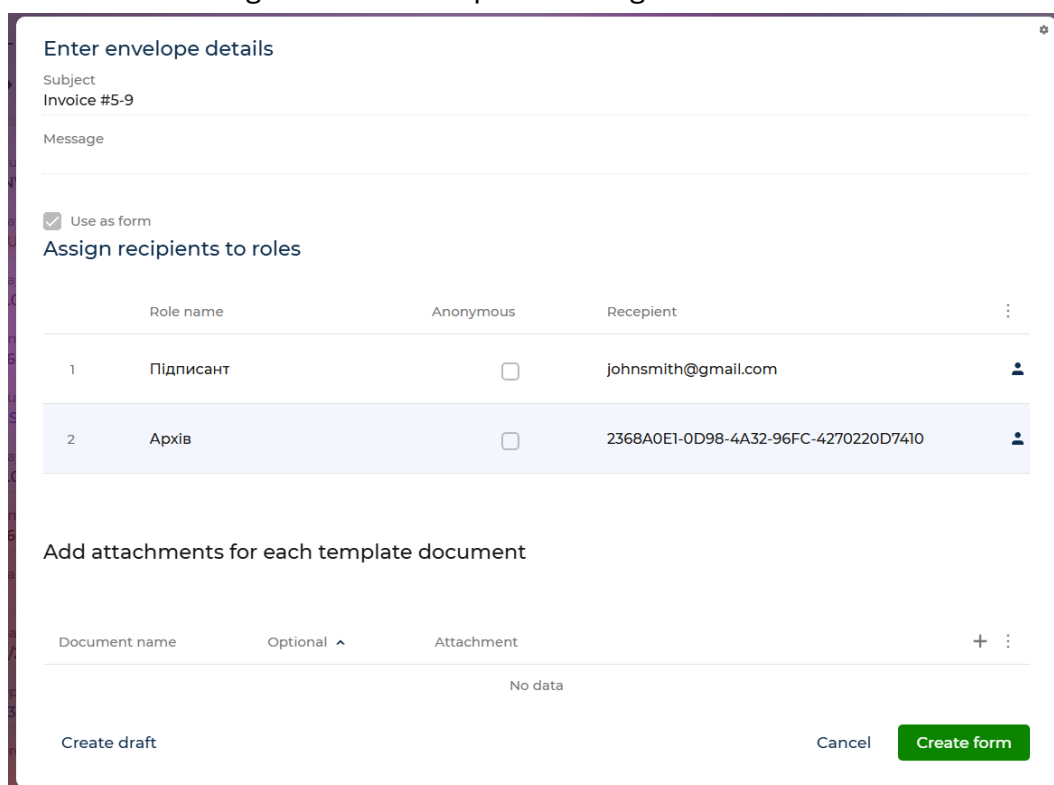
Template *

Invoice

Cancel Select

7. **Filling in sending parameters (Enter envelope details).** In this window, you need to specify:

- Subject: Set the envelope title that the recipient will see.
- Message: The text of the accompanying email.
- Recipients (Assign recipients to roles): Select from Creatio contacts, or specify the mailbox UUID, or email for each participant (for example, Client or Director). Recipients can also be filled in automatically; this needs to be configured in the Template settings section.



Enter envelope details

Subject
Invoice #5-9

Message

Use as form

Assign recipients to roles

	Role name	Anonymous	Receipient	
1	Підписант	<input type="checkbox"/>	johnsmith@gmail.com	
2	Архів	<input type="checkbox"/>	2368A0E1-0D98-4A32-96FC-4270220D7410	

Add attachments for each template document

Document name	Optional	Attachment	
No data			

Create draft Cancel Create form

8. The document form opens instantly in an embedded window directly in the Creatio interface. At this stage, you can manually complete any fields or modify

existing data directly in the document text. This allows sending documents without предварительного entering all data into the Creatio record card.

The screenshot shows the 'Invoice #5-9' form in the Creatio application. The form is mostly empty, with red boxes highlighting the input fields for the seller and buyer details. The 'Invoice Number' field is pre-filled with 'Number' and the date is '22.11.2025'. The 'To pay' amount is '1 600,00 UAH'. The 'Buyer' section includes fields for 'Buyer', 'USREOU or ITN', 'Index', and 'Full address'. The 'Payment term' is set to 'Date'. The 'IBAN' field is also empty. At the bottom, there are 'Next' and 'Reject' buttons.

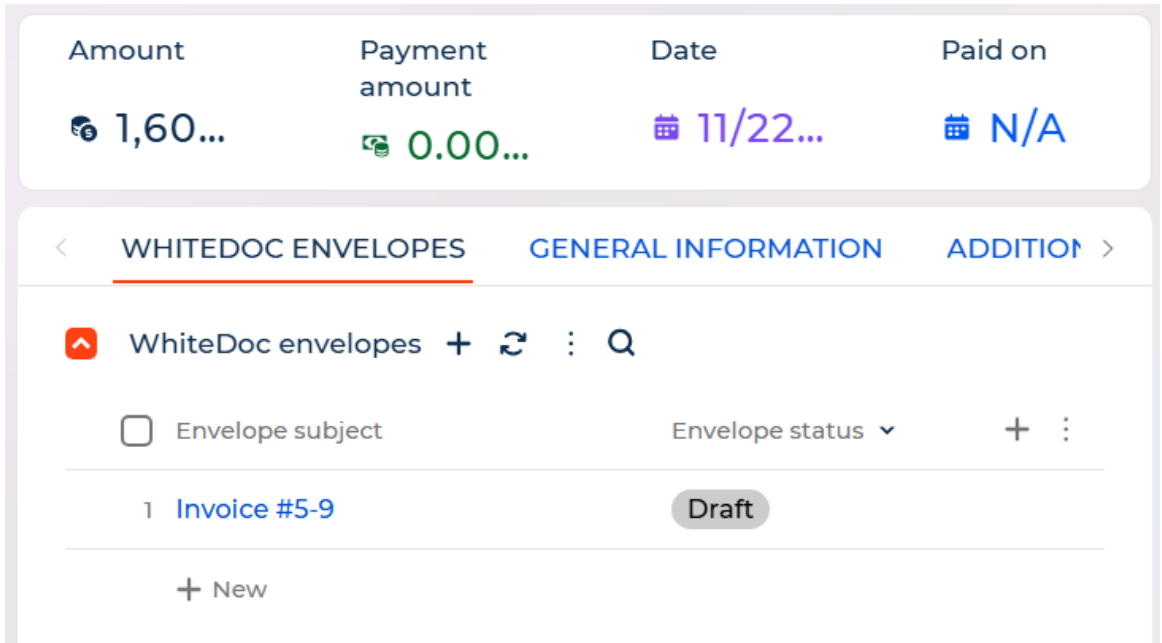
9. **Final sending:** After filling in all technical fields, click the Send (Finish) button in WhiteDoc.

The screenshot shows the 'Invoice #5-9' form with all fields filled in. The 'Seller' information includes 'Seller', 'USREOU or ITN: 12345678', '12345678 - Olena Telivy Street', and 'TIN or VAT ID: 1234134543'. The 'Buyer' information includes 'Buyer', 'USREOU or ITN: 12341345', '12345678 - Olena Telivy Street', and 'TIN or VAT ID: 1234134543'. The 'Date' is '22.11.2025 p.', 'Number' is '5-9', and 'Payment term' is '01.01.2026'. The 'IBAN' is 'UA341324123412341234123'. The 'To pay' amount is '1 600,00 UAH'. A table of items is shown below the form:

Item	Number	Price	Amount excluding VAT	VAT amount	Sum
Installing software					
Item description	60,000	12,00	720,00	144,00	864,00
Total:					864,00

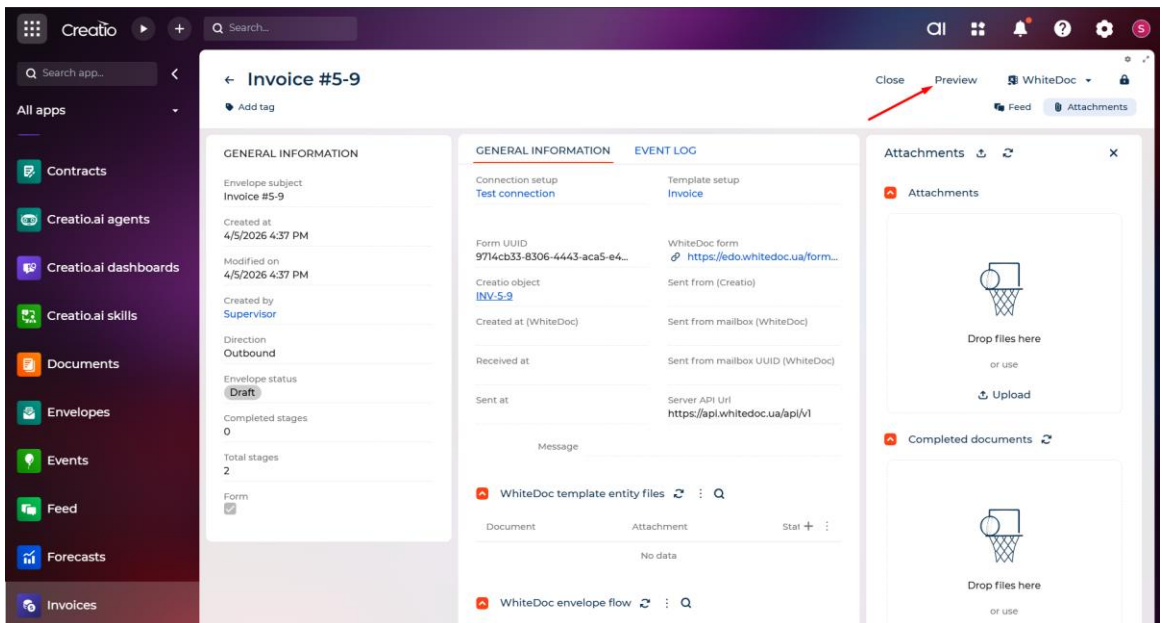
VAT specifications: 20% 144,00 UAH. (720,00 UAH.)
Comment: Comment
Formed: Formed
At the bottom, there are 'Finish' and 'Reject' buttons.

10. The document is sent. A new envelope is added to the “WhiteDoc envelopes” detail of the record. WhiteDoc users (recipients) are automatically notified about the need to process or sign the document according to their roles.



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 state of the completed form or track the signing process.



.3. Sending using configured templates (Mapped Templates)

This method provides the highest level of automation. The flexibility of the system allows you to connect and configure any of your templates created in WhiteDoc and link them to any object (entity) in Creatio.

i This method provides the highest level of automation. The flexibility of the system allows you to connect and configure any of your templates created in WhiteDoc and link them to any object (entity) in Creatio.

1. In the card of the required record (for example, Invoice), click the WhiteDoc → Send button.
2. **Template selection:** In the opened window, select the required template. The system will automatically generate the document by inserting data from Creatio fields according to the configured mapping.
3. **Filling in envelope data:** The Fill in envelope data window will open, where you need to check or fill in:
 - Subject: The name of the envelope that the recipient will see.
 - Message: The accompanying email 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.

.3.1. Working with drafts (Drafts)

The ability to work with a document in Draft status allows you to review and modify its content before final sending to the recipient.

- **Automatic creation:** As soon as you click the “Send” button in the record card, the system creates an envelope in WhiteDoc with Draft status.
- **Preview:** You can close the sending window and return to the document later via the “WhiteDoc envelopes” detail. Click the “Preview” button to open the document in an embedded window (iframe) directly in Creatio.
- **Editing on the fly:** In preview mode, you can manually complete fields or modify the document text. This is especially useful if the data in Creatio was incomplete or requires manual уточнения.

- **Draft update:** The functionality allows updating data in the draft and reviewing the result as many times as needed until the final click of the “Send” button in the envelope window.

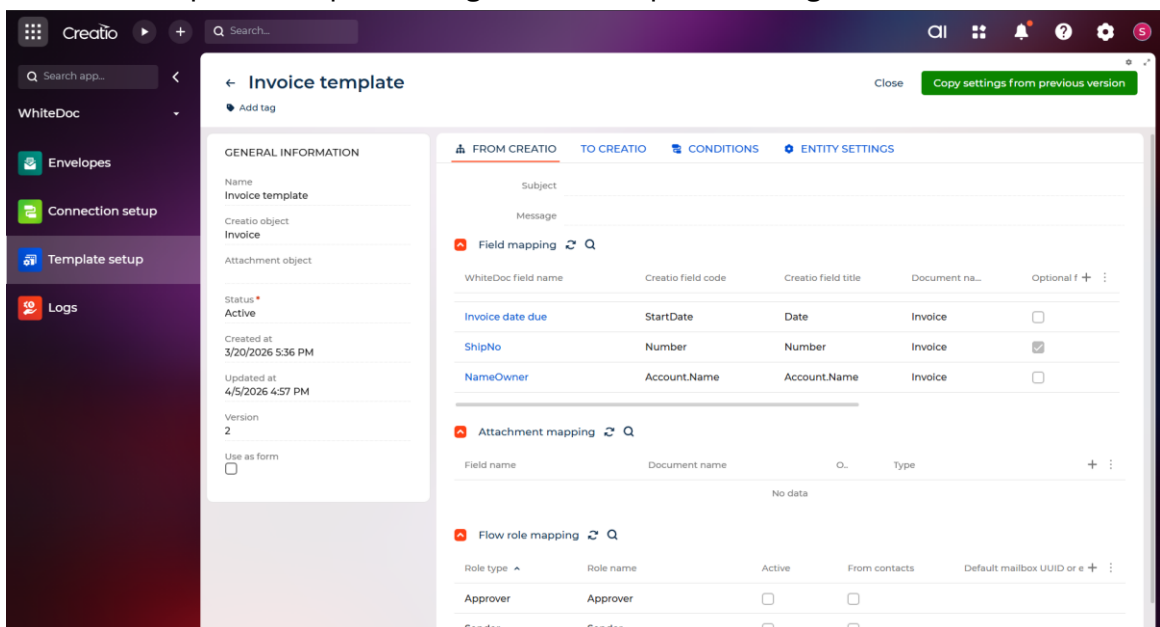
Field mapping (Mapping)

Mapping is the process of establishing a connection between fields in the Creatio system and fields in a document template in WhiteDoc. This allows automating document completion and data synchronization.

.1. From Creatio (data transfer to the document)

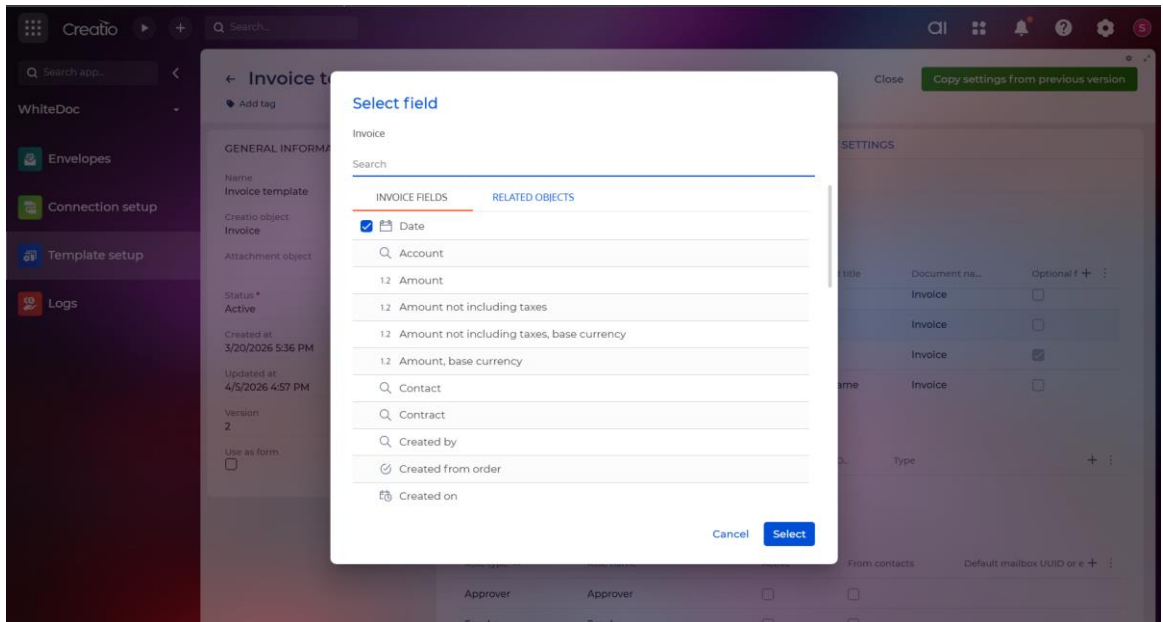
This type of mapping ensures automatic pulling of values from system object records directly into the document text before sending.

1. Go to the WhiteDoc → Template settings section.
2. Select the required template and go to the Template settings tab.



3. Open the “From Creatio” tab. This tab is responsible for mapping data from Creatio.

- In the “Field mapping” detail, for each template element specify the corresponding field in Creatio.



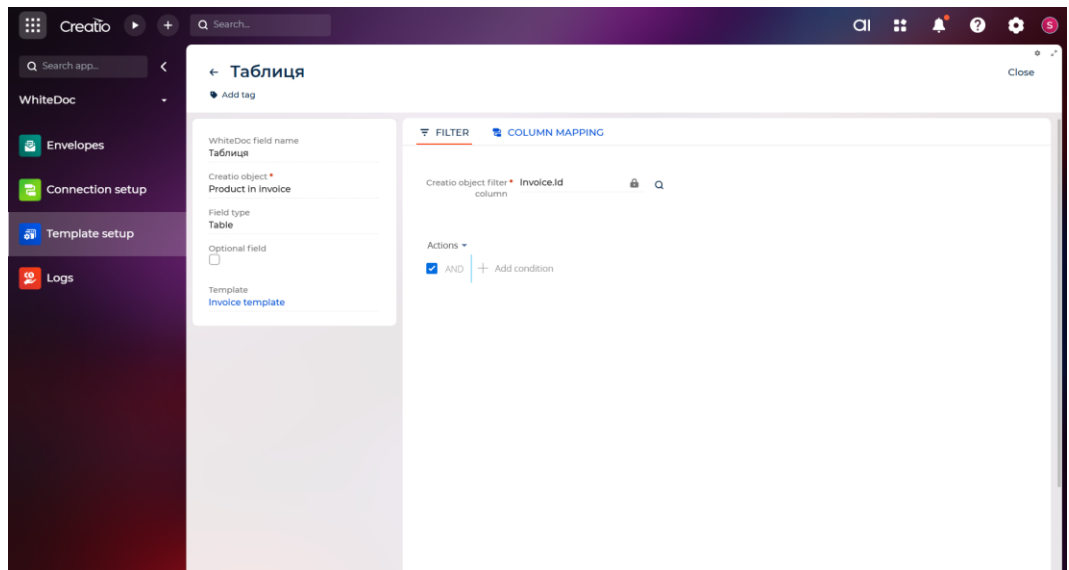
- Technical details:**

- Column path: The path to the column of the Creatio object from which the value is transferred.
- “Optional” flag: If the field is not marked as optional and it is empty in the system, switching the template to “Active” status will be blocked.

Field mapping

WhiteDoc field name	Creatio field code	Creatio field title	Document na...	Optional f +	:
Invoice date	StartDate	Date	Invoice	<input type="checkbox"/>	
SiteOwner	Account.Web	Account.Web	Invoice	<input type="checkbox"/>	
Shipping			Invoice	<input checked="" type="checkbox"/>	
PhoneOwner	Account.Phone	Account.Primary pho...	Invoice	<input type="checkbox"/>	

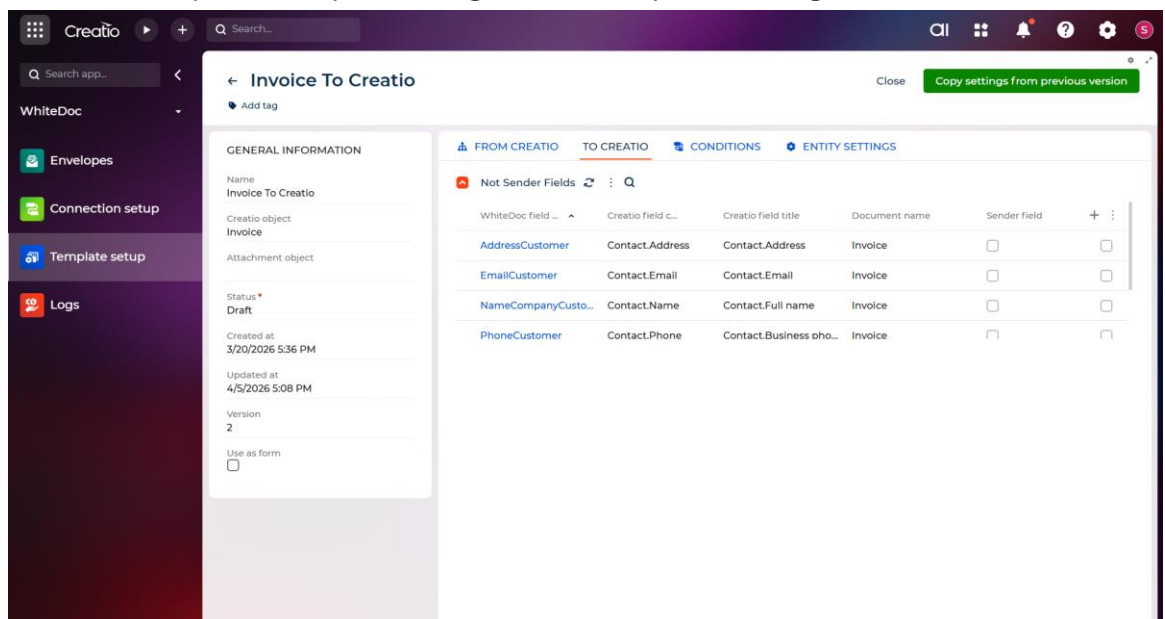
- Table: If the template contains a table in the Creatio object, it is necessary to configure mapping for the Creatio table identifier.



.2. To Creatio (reverse mapping)

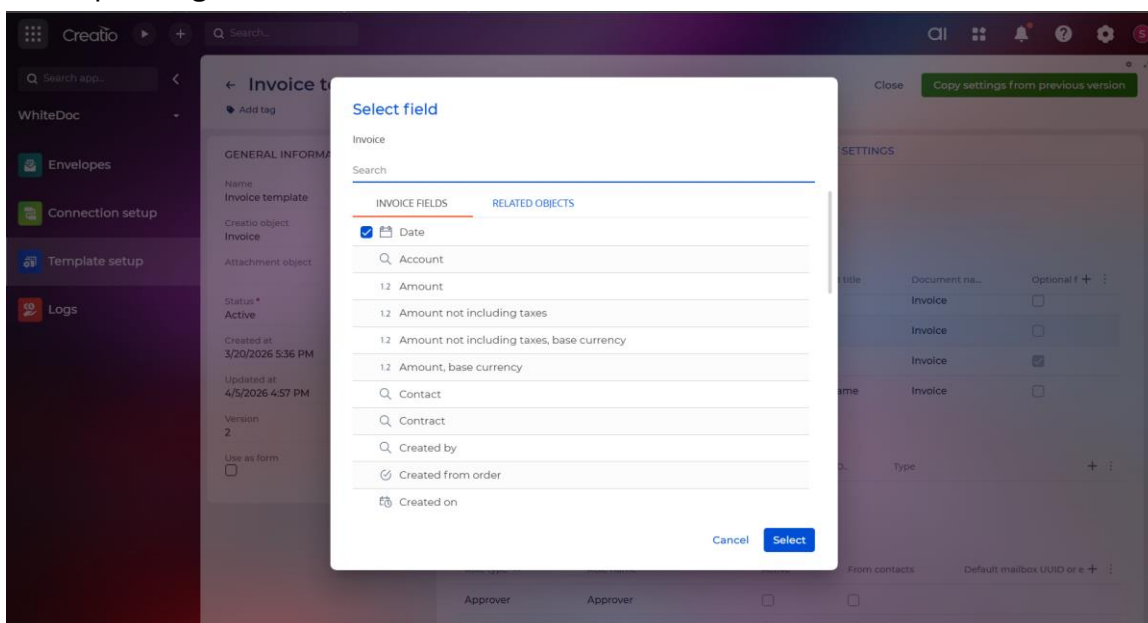
The reverse mapping function allows automatically updating records in Creatio based on data that the client entered or modified in the document during signing.

1. Go to the WhiteDoc → Template settings section.
2. Select the required template and go to the Template settings tab.



3. Open the "To Creatio" tab. This tab is responsible for mapping data to Creatio.

4. In the “Field mapping” detail, for each template element specify the corresponding field in Creatio.



Technical details:

- Two-way synchronization: Data is returned to the system automatically after the completion of the envelope signing process or status change.
- Related entity: The system uses the object specified in the “Related entity” field to determine where to store updated data.
- Mapping in Creatio: Available for fields of all roles except Sender in WhiteDoc templates

Actions with documents after sending and administration

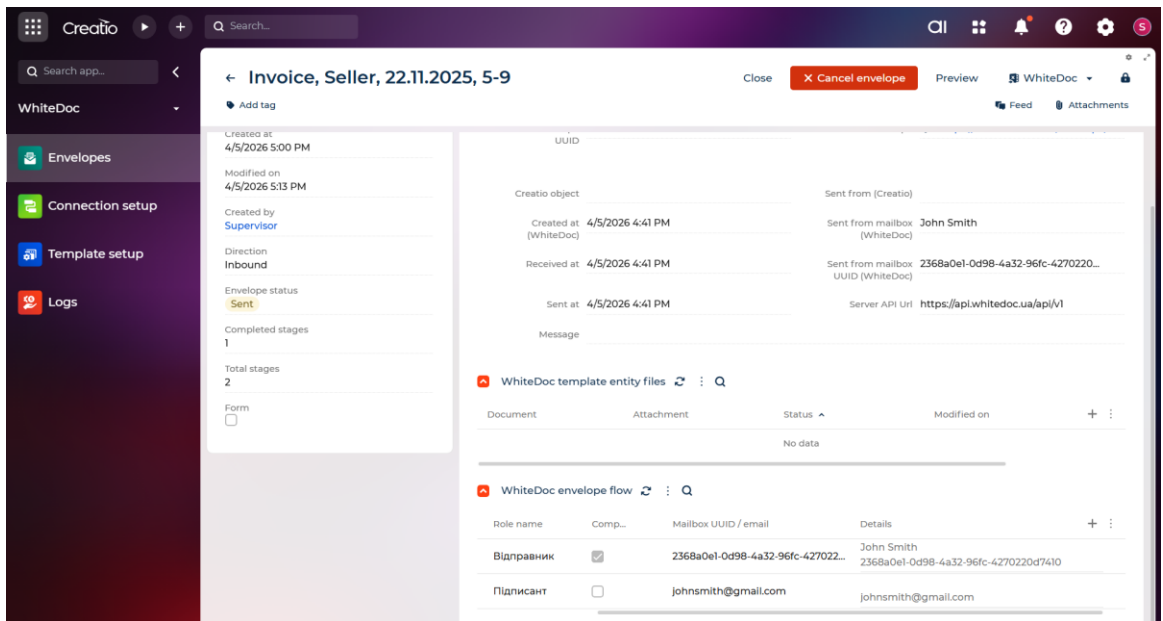
After a document has been sent, the user can fully control its дальнейший status and perform administrative actions directly from Creatio.

.1. Monitoring and updating statuses

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

- You can see the current status (Sent, Waiting, Completed). If the webhook has not been triggered yet, click the Update status button for instant synchronization

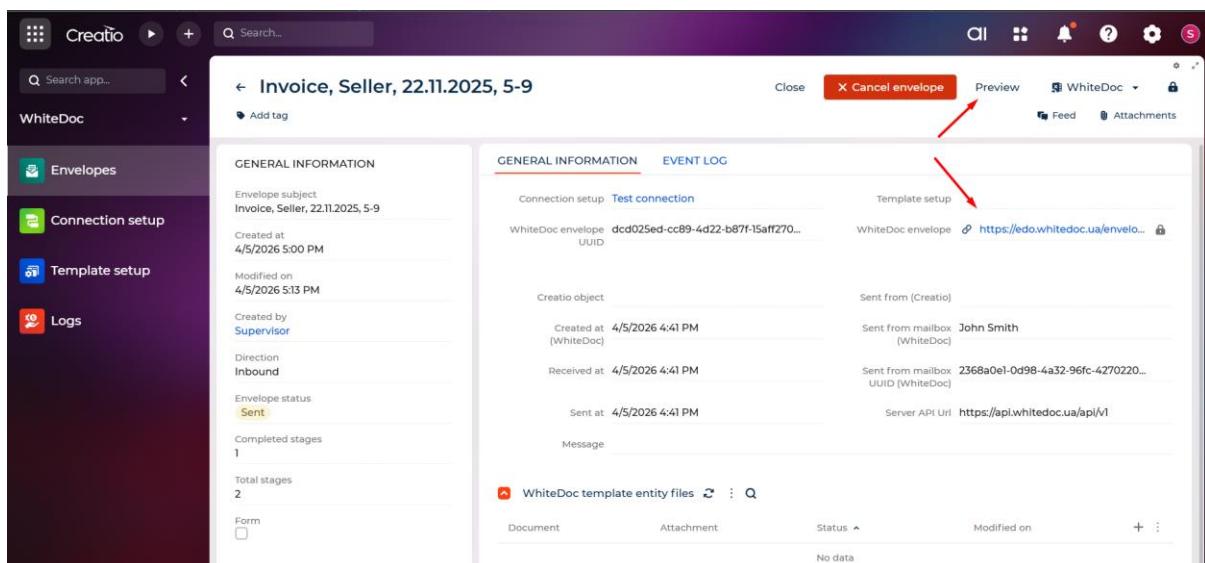
of the envelope state.



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

.2. Preview via Preview (iframe)

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

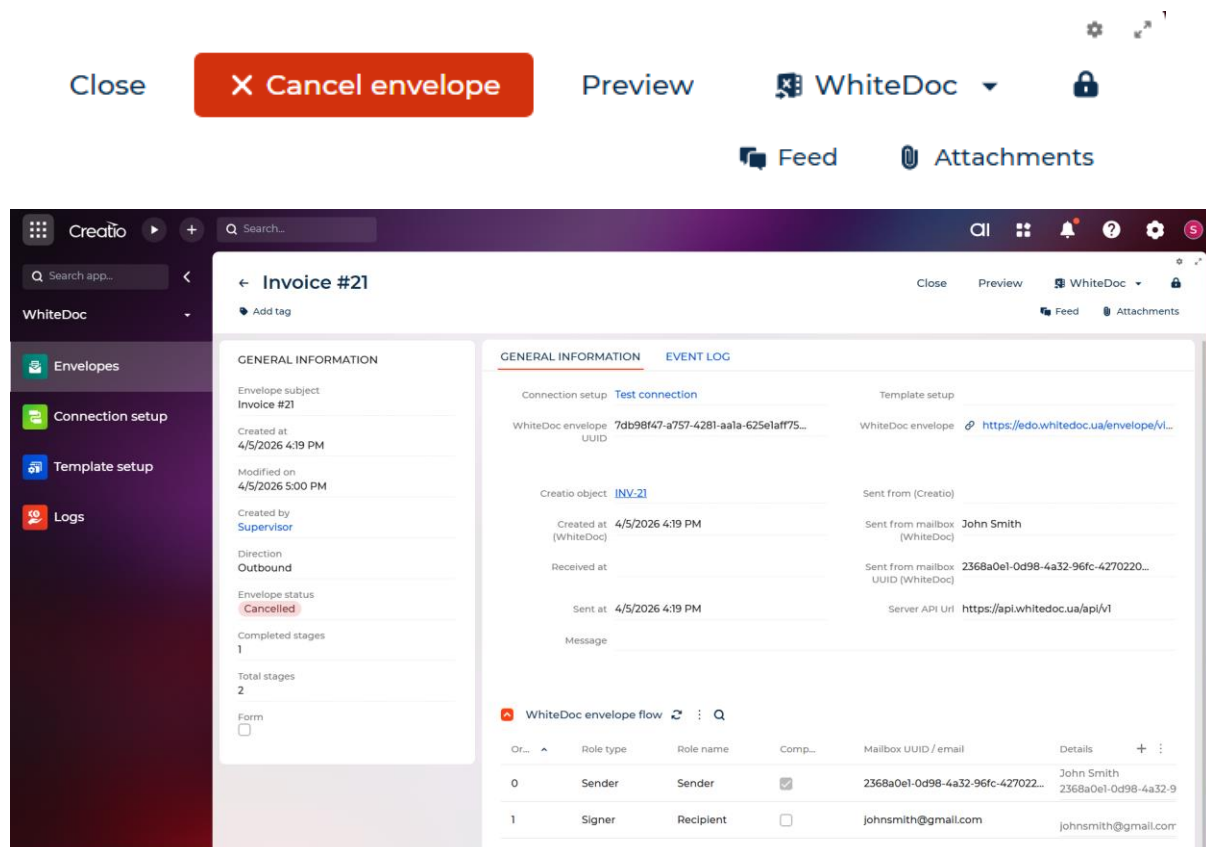


You can check the content of filled fields or view applied signatures without going to the WhiteDoc website. Additionally, you can go to WhiteDoc to view all sent or received

documents.

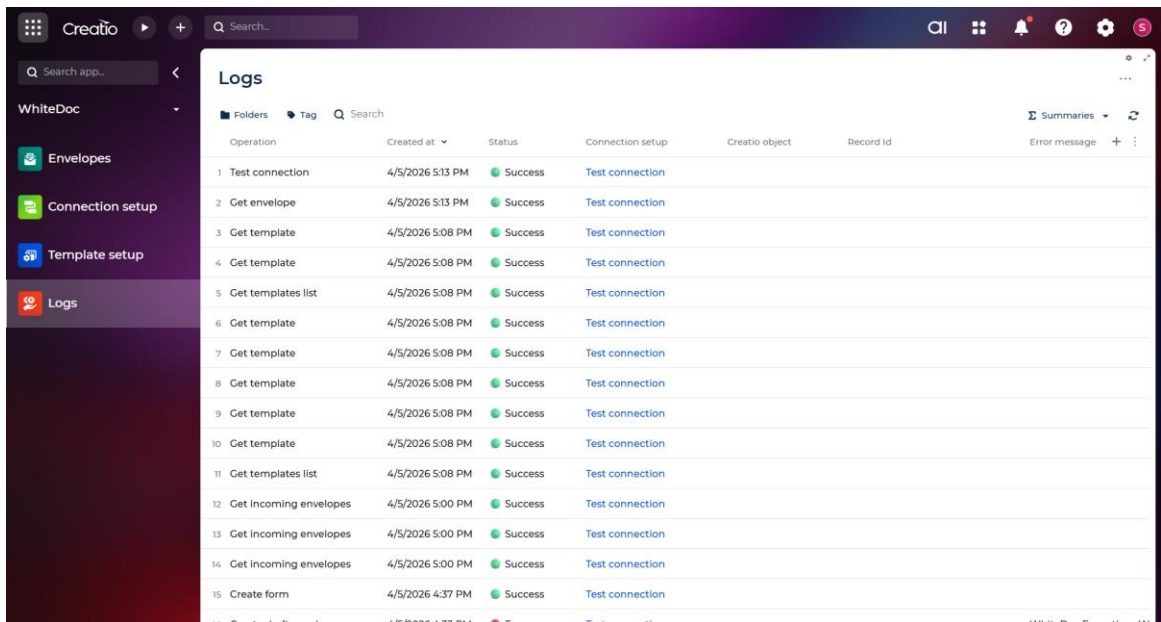
.3. Document cancellation (Cancel)

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



.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.



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

Flow role mapping

Role type	Role name	Active	From contacts	Default mailbox UUID or e
CC	Архів	<input type="checkbox"/>	<input type="checkbox"/>	
Sender	Відправник	<input type="checkbox"/>	<input type="checkbox"/>	
Signer	Підписант	<input type="checkbox"/>	<input type="checkbox"/>	

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

✔ Setup is complete. Your Creatio system is now ready for a full cycle of working with electronic documents. All buttons are added, mapping is configured, and monitoring processes are ready for use.

Full list of application processes

Process name	Description
WhiteDoc. Actualize Templates by current connection	Designed to retrieve and update templates of the current user
WhiteDoc. Actualize Templates by all connections	Designed to retrieve and update templates across all active connections
WhiteDoc. Quick send Envelope	Process responsible for quick sending from attachments of the current record from which the business process is launched
WhiteDoc. Create Envelope and send	Designed to create and send an Envelope
WhiteDoc. Get Envelopes	Designed to retrieve envelopes associated with the current user's mailbox
WhiteDoc. Get Envelopes by all connections	Designed to retrieve all envelopes associated with active WhiteDoc connections
WhiteDoc. Copy Template setting from previous version	Process for copying template settings from a previous version
WhiteDoc. Read Entity from cache	Process for retrieving entity information from Redis cache
WhiteDoc. Check and get Envelope data	Process for validating filled data before sending the Envelope
WhiteDoc. Update Envelope status	Process for updating the Envelope status
WhiteDoc. Add webhook on Envelope status changed	Designed to add a webhook for envelope status changes
WhiteDoc. Cancel active Envelope by Entity	Designed to cancel an Envelope from the related entity
WhiteDoc. Cancel Envelope	Designed to cancel an Envelope
WhiteDoc. Copy Envelope files to master Entity	Process for copying Envelope files to the related entity
WhiteDoc. Get Envelope archive	Process for retrieving an archive of all Envelope documents and saving them to the Envelope detail
WhiteDoc. Get Envelope for print	Designed to retrieve printable forms (PDF) of all Envelope documents and save them to the Envelope detail

WhiteDoc. Get last final Envelope for print by Entity	Designed to retrieve the printable form for the latest Envelope by related entity
WhiteDoc. Update active Envelope status by Entity	Designed to update the status of the active Envelope by related entity