



## Instructions for using the application WhiteDoc in Creatio



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## Glossary

A list of the main objects in the Creatio system is shown in the table below:

Term	Description
Main menu	Start page of the system, which contains grouped by groups of links to the system sections, a button to go to the settings interface, a button to open the client profile page.
Action	The logic performed by the system at the request of the user. Actions are initiated by system users over certain records (for example, Google Contacts synchronization action, client export).
Detail	A system element designed to store additional information about a system object. For example, on certain details of the section "Accounts" / "Legal Persons" the information about employees / legal persons of selected record is saved. The list of details for each section of the system varies.
Record	The records list item that defines the main parameters of a single system object. The records of all sections are named after the name of the corresponding system objects (for example, Activity record, Knowledge base record, etc.).
User	An ordinary user of the system who uses those elements and functions of the system to which he has been granted access by the administrator.
Process	A sequence of actions that formally describe what needs to be done to achieve a specific result. For example, a process could be the sequence of actions for signing a contract or selling a product.
Section	A separate system module designed for working with objects of a specific class and characterized by special functionality. Examples of sections include ""Accounts"", ""Contacts"", etc.
Registry	An element of a system section that is a list of records for the current section. Examples of registries include the accounts registry, contacts registry, etc.



System Administrator	System administrator has full access to all elements of the system: he forms user groups, allocates the permissions, determines system settings.
Record page, record card	A system element intended for entering and editing the record. Named after the name of the corresponding system objects (for example, account page, contact page, etc.). It is named after the corresponding objects of the system (e.g., Account page, Contact page, etc.).
Organizational role	Part of the organizational structure of the company, some organization or division, for example, «Sales Department of the main office» or «HR Department of the regional office».



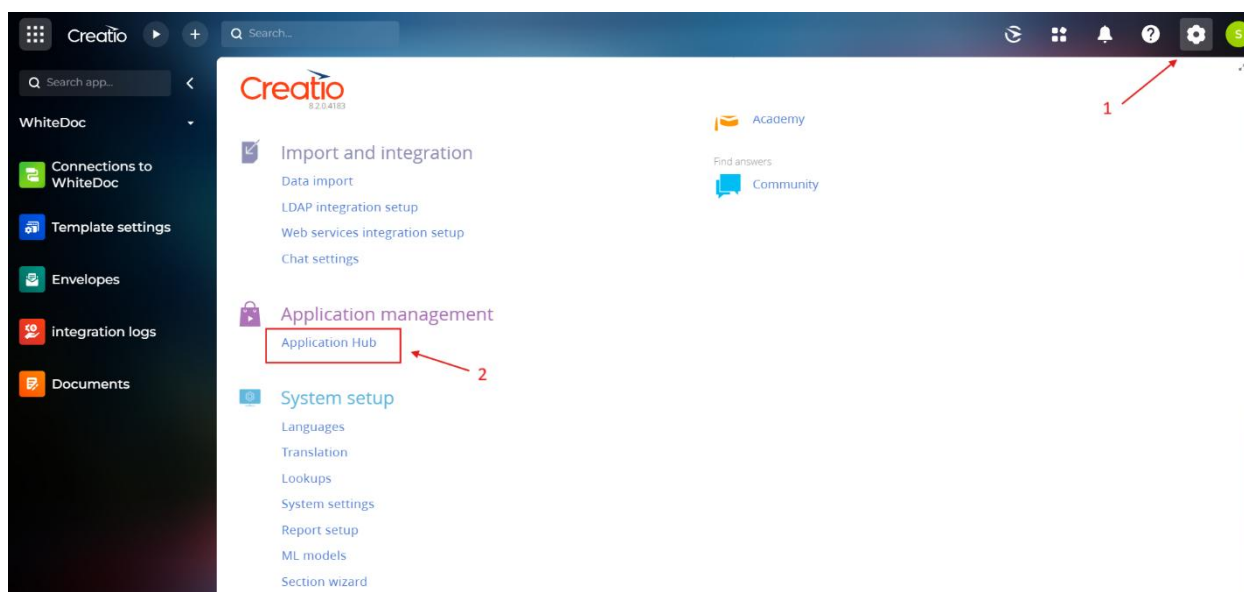
## General Information

This guide describes how to use and configure the White Docs app in Creatio.

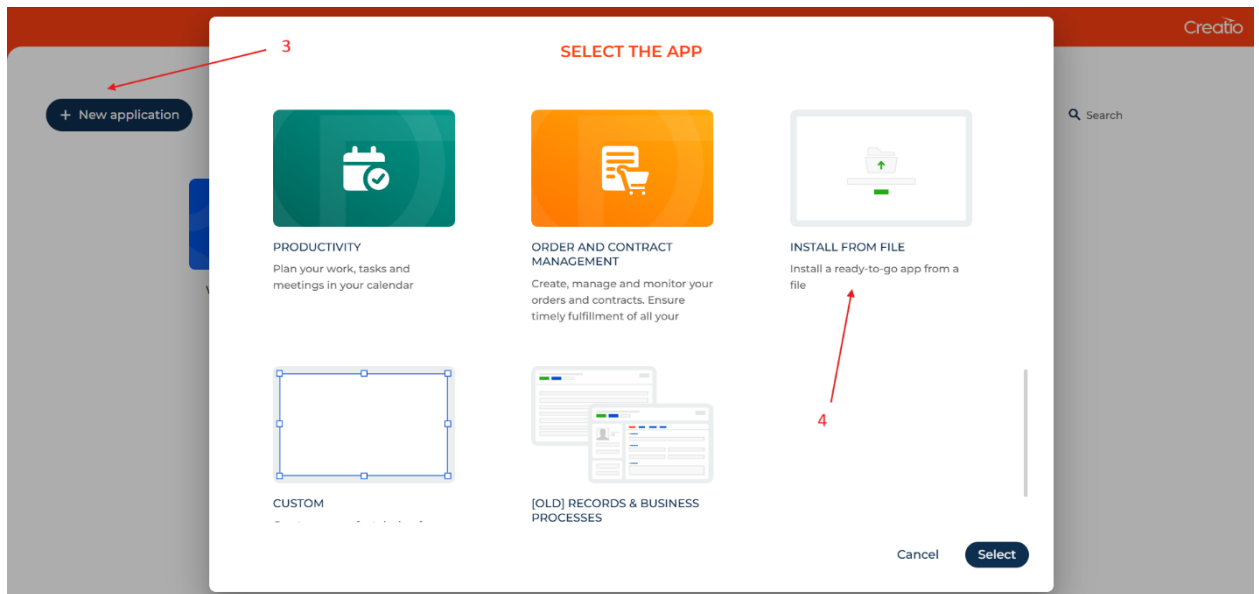
To correctly exchange documents between WhiteDoc and Creatio, follow these steps:

1. Set up a connection between Creatio and WhiteDoc, see the Connection to WhiteDoc section.
2. Configure app actions for the document section in Creatio.
3. Configure template field mapping - see the Template Settings section.
4. Create and update the necessary Creatio records that will be used to fill in the document template (for example, the record in the Documents section).
5. Send a document to WhiteDoc and track its status in the generated envelope - see the Envelopes section.

### 1. Install and configure the app



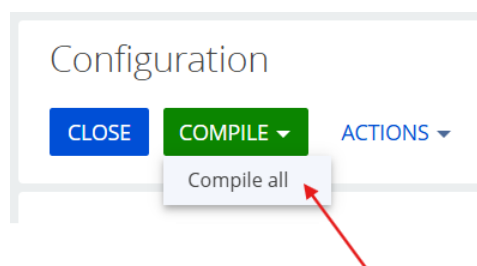
1. Go to the System Designer section.
2. Open the «Application Hub».



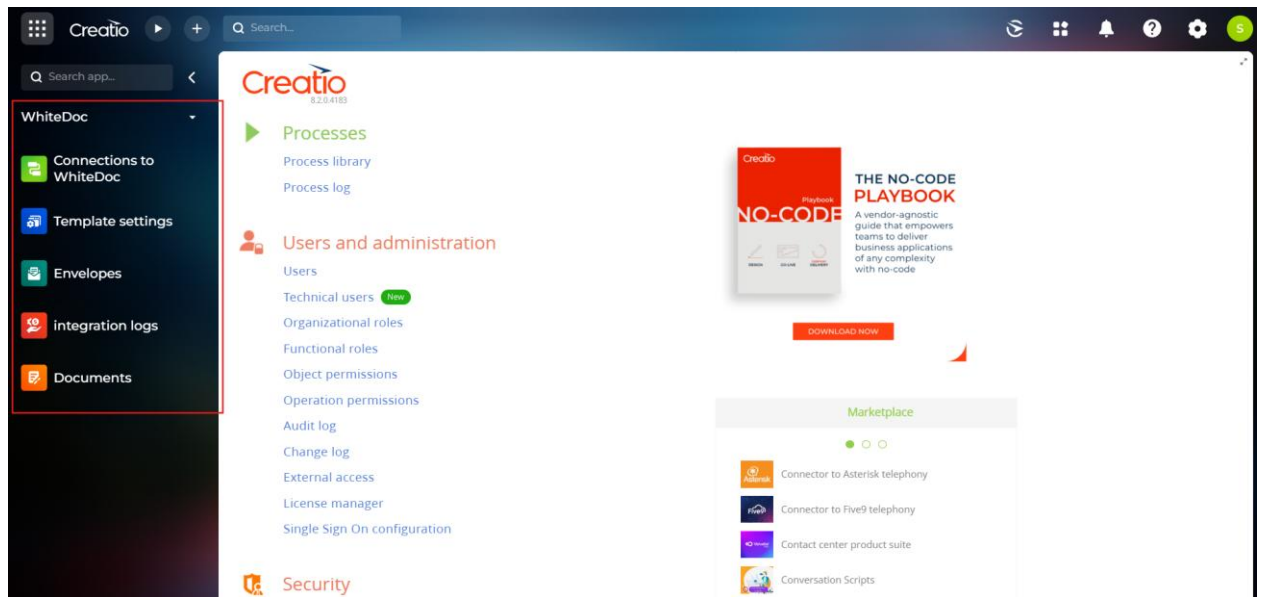
3. In the new window that opens, click "+ New Application".
4. Select "Install from File" and select the file with the application archive in the new window.

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

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

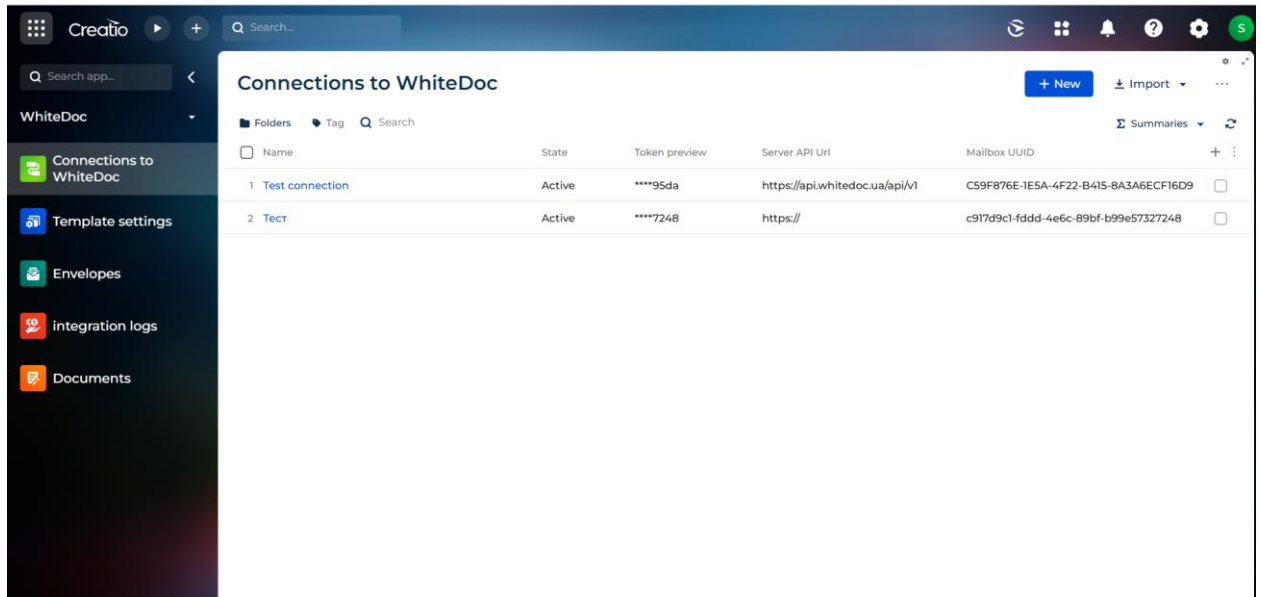


5. After successful installation, a new WhiteDoc workspace will appear on the workspace panel with a list of application sections.





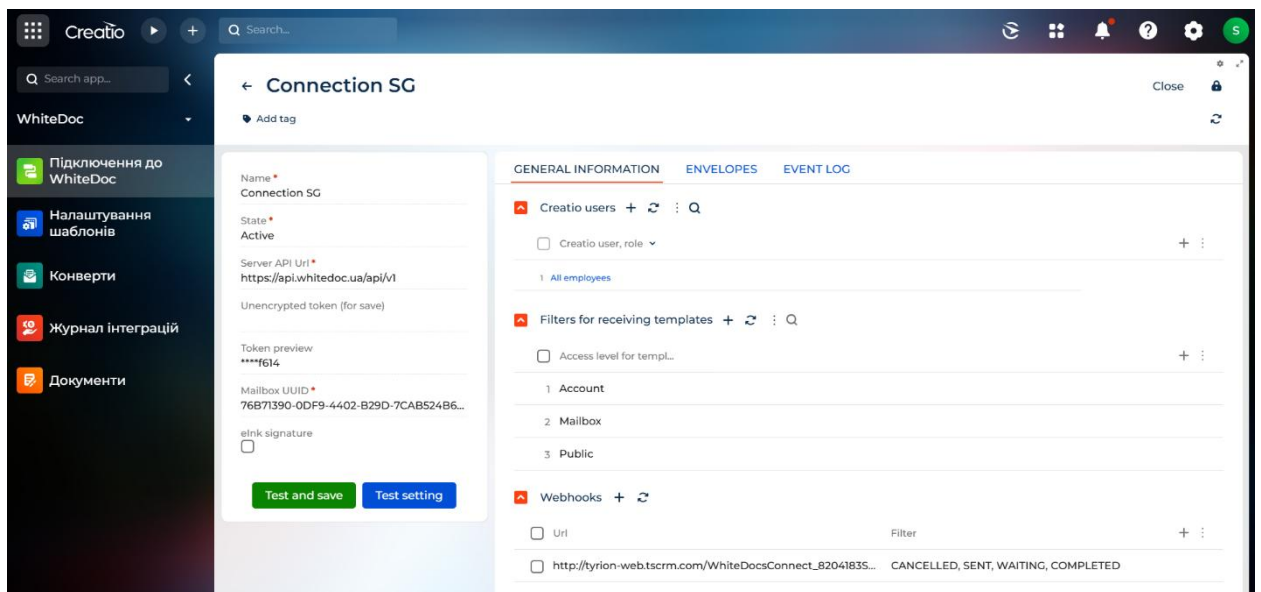
## 1.1. The Connection to WhiteDoc section



This section is used to set up a connection to WhiteDoc.

To add a new connection, press **+ New**.

The new connection editing page opens.



### 1.1.1. Settings fields

Fill in the required settings.

The list of fields on the editing page of the "Connection to WhiteDoc" section.

**WhiteDoc:**  
transform data  
into action





Field	Type	Description
Name	String	Set a name for the setting.
State	Lookup «WhiteDoc. Connection status»	The field contains information about the setting states: <ul style="list-style-type: none"><li>• Draft - default status when creating a setting.</li><li>• Active – the currently active connection setting. Set manually.</li><li>• Archive – state of settings that are currently deactivated.</li></ul>
Server API Url	String	Specify the connection server URL.
Unencrypted token (for saving)	String	Specify the connection token from the server, obtained in WhiteDoc. The token is entered only during setup. In active connection records, the token is not displayed in this field.
Token preview	String	Displays the saved token in encrypted form. Non-editable field.
Mailbox UUID	String	Specify the UUID of the mailbox with which document exchange will occur.
eInk signature	Boolean	Graphic signature indicator. Specified for the Doc studio instance.

After filling in the configuration fields, you can check the settings:

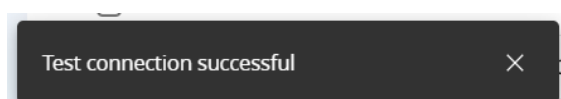
**Test setting**

- checking the settings without saving.

**Test and save**

- checking and saving the settings.

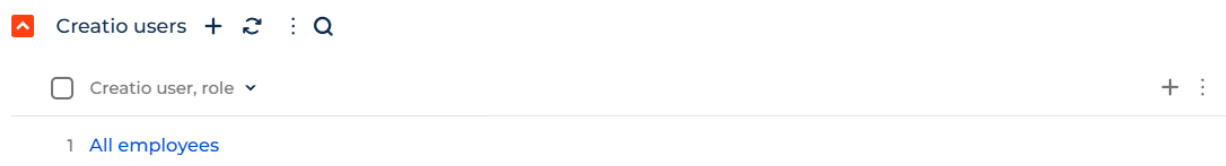
If the connection to the WhiteDoc server is successful, a notification will appear on the screen:





## 1.1.2. Details

### 1.1.1.1. Creatio users

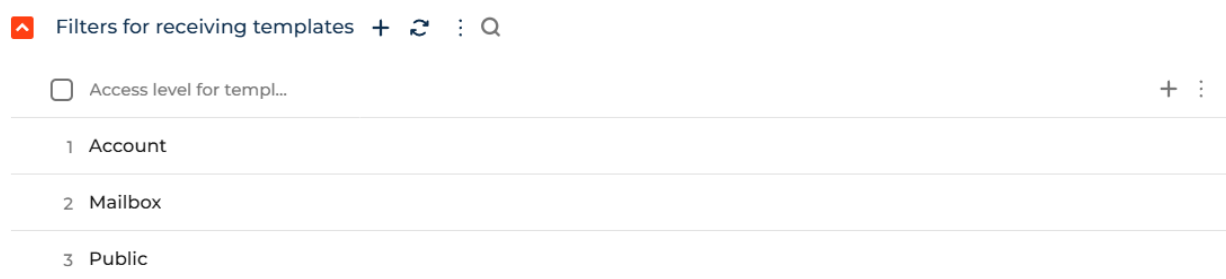


The detail displays a list of users and organizational roles that have access to the connection. By default, when you add a new setting, the "All Employees" role is selected.

It is located on the "General Information" tab.

One role/user can be contained in only one active connection.

### 1.1.1.2. Filters for receiving templates.



The detail contains a list of access levels on the White Doc side:

- Own
- Corporate
- Public
- Official
- Common

If the details are not filled in, the connection will automatically use the Public level.

If you need to add a new reference value, this value should be added to the "WhiteDoc. Access level for templates" directory. The name of the new value can be arbitrary, the code must match the code on the WhiteDoc side.



### 1.1.1.3. Webhooks

Webhooks

<input type="checkbox"/> Url	Filter	+ ⋮
<input type="checkbox"/> <a href="http://tyrion-web.tscrm.com/WhiteDocsConnect_8204183S...">http://tyrion-web.tscrm.com/WhiteDocsConnect_8204183S...</a>	CANCELLED, SENT, WAITING, COMPLETED	

The detail contains the settings for the webhooks of the integration call.

The filter for webhooks is configured on the WhiteDoc side and includes a list of envelope statuses that will trigger the transfer of WhiteDoc information to Creatio.

### 1.1.1.4. Envelopes

Envelopes

<input type="checkbox"/> Subject	Created on ^	Created by	Template setting + ⋮
1 <a href="#">Subject is empty</a>	3/27/2025 12:00 PM	<a href="#">Supervisor</a>	
2 <a href="#">Subject is empty</a>	3/27/2025 12:00 PM	<a href="#">Supervisor</a>	

The detail contains a list of envelopes that have been formed within the current connection. The detail is located on the Envelopes tab of the section editing page.

Non-editable detail.

### 1.1.1.5. Event log

Event log

	Created on v	Message	+ ⋮
⋮ 1	4/3/2025 7:00 PM	Successfully retrieved 20 incoming envelopes	
2	4/3/2025 7:00 PM	Successfully retrieved 20 incoming envelopes	

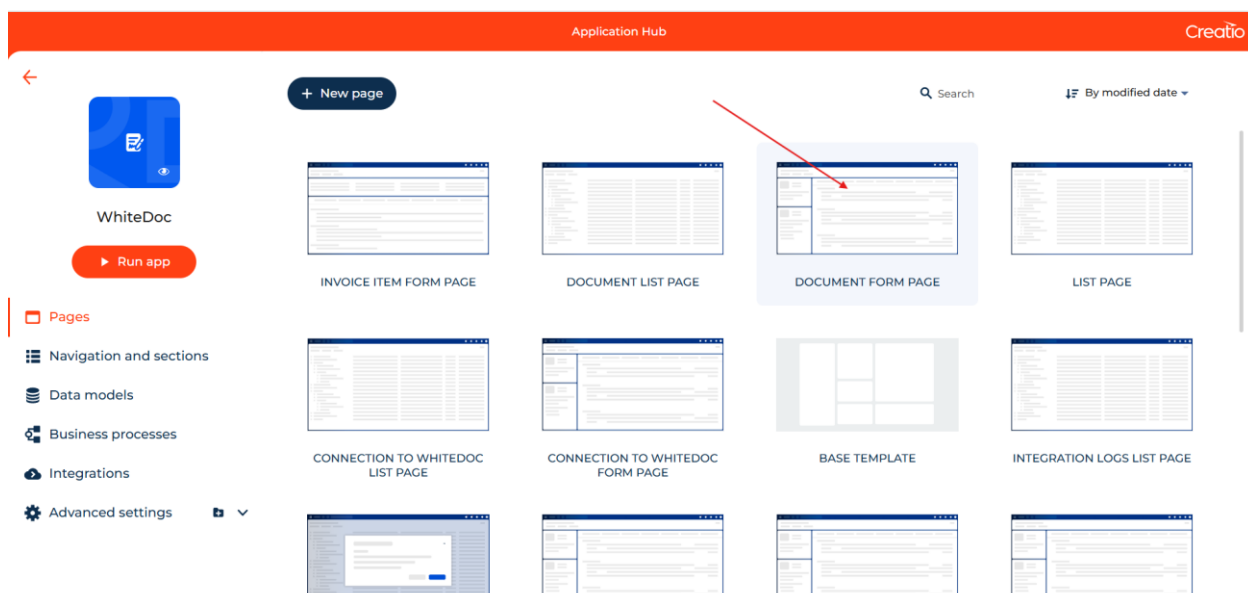
The detail contains a list of logs generated during the development of the current connection.



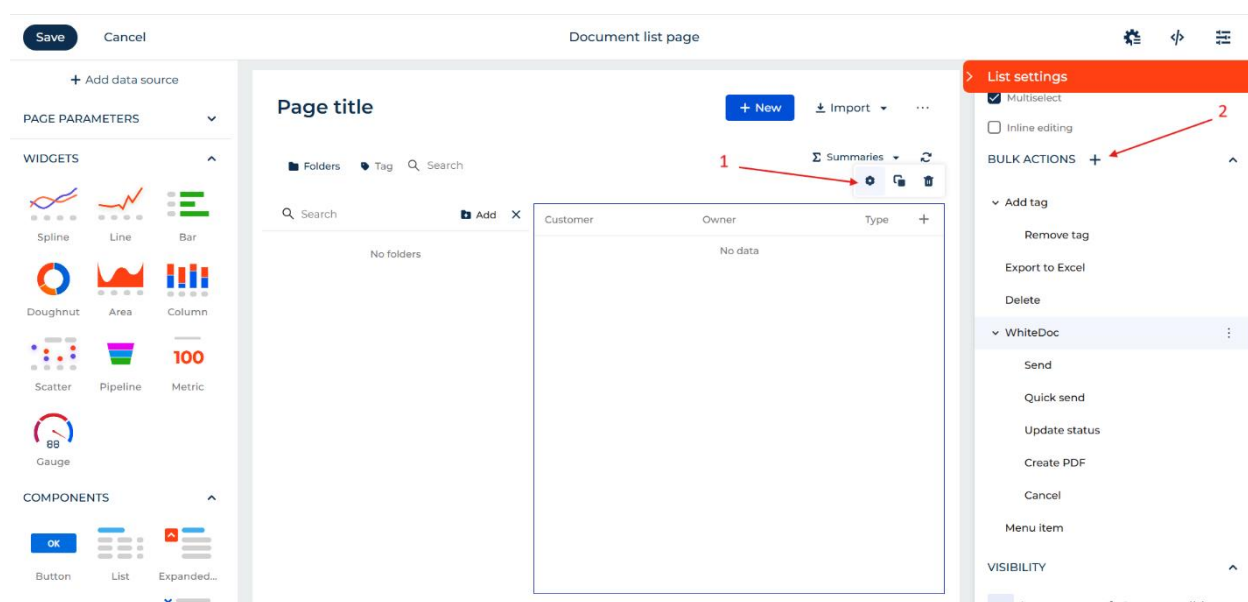
## 1.2. Configure the connector in the system section.

To work with document records in Creatio and then share them with WhiteDoc, you need to make changes to the settings of the required section:

1. In the System designer section, go to the Application hub.
2. Open the app that contains the section you want to access.
3. In the window that opens, select the editing page for the desired section (see the example in the figure).



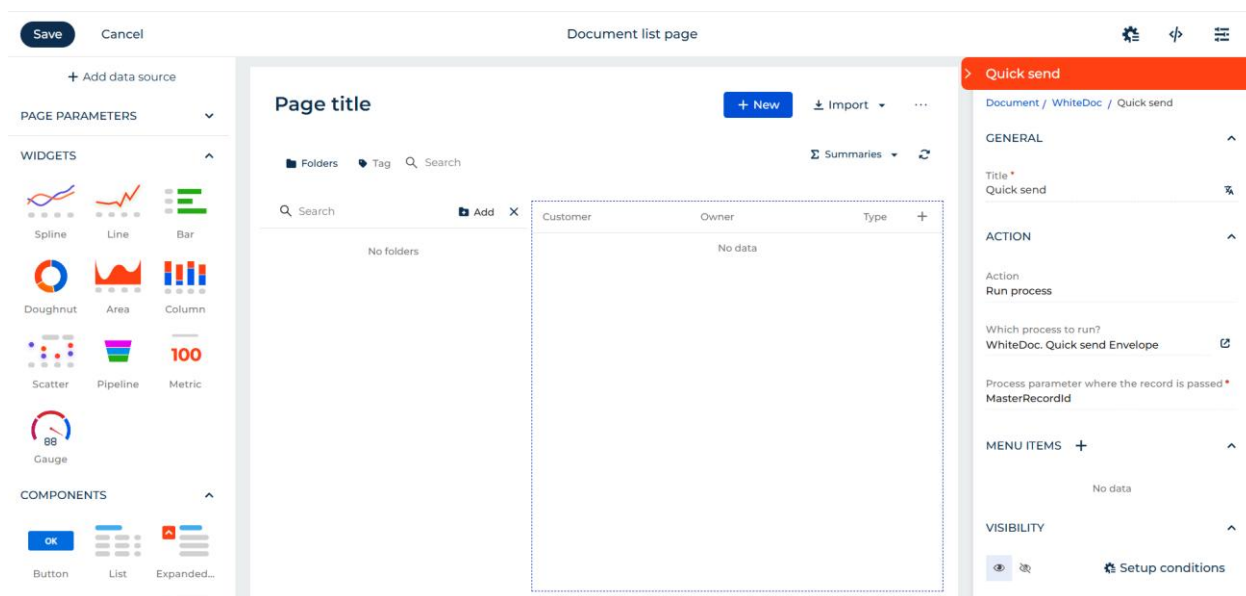
4. In the page editing window, open the settings menu (1) and add WhiteDoc actions (2) to the list of page actions.



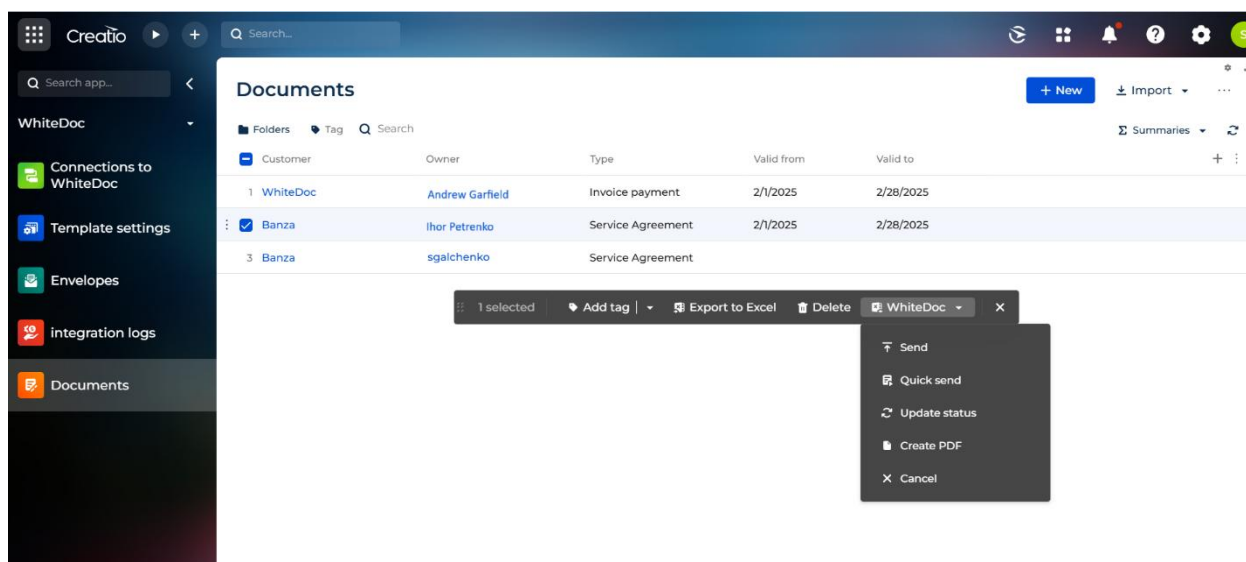


Example of settings for adding a Quick send action:

- In the Action field, select Run process;
- In the "Which process to run?" field, select the required process that will be launched on click. In this case, "WhiteDoc. Quick send Envelope" (see the section "WhiteDoc processes").



5. When you go to the section record page for which the action was configured, you can see the added item in the menu:





## 2. Envelopes section

This section is used to store information on all generated envelopes in the system.

Envelopes are automatically created when you send a document to WhiteDoc.

The envelope status is updated via integration with WhiteDoc:

- by clicking the "Update" button;
- to the Creatio scheduler settings.

Subject	Created on	Created by	Connection setting	Template setting	WhiteDoc envel
1 Test	2/28/2025 2:51 PM	Supervisor			
2 Test1	2/28/2025 2:51 PM	Supervisor			
3 Quick send from T	3/14/2025 4:29 PM	Supervisor			572ecb7c-465b-4ef9-bff
4 Subject is empty	3/14/2025 4:30 PM	Supervisor		Invoice	b5cb3d78-0bc5-40d3-b
5 Subject is empty	3/27/2025 12:00 PM	Supervisor	Test connection		4aba3979-598a-466c-bl
6 Subject is empty	3/27/2025 12:00 PM	Supervisor	Test connection		00c7b76a-7627-4e81-8c
7 test in	3/27/2025 12:00 PM	Supervisor	Test connection		af67e9ff-8dae-4ae5-98d
8 Subject is empty	3/27/2025 12:00 PM	Supervisor	Test connection		e183cbf1-6aef-4fef-9b07
9 Demo	3/27/2025 12:00 PM	Supervisor	Test connection		769d2670-893a-4517-92
10 Todo get files name	3/27/2025 12:00 PM	Supervisor	Test connection		3da83529-f5bc-4318-8dc
11 Todo get files name	3/27/2025 12:00 PM	Supervisor	Test connection		bd3625e0-51ae-4a62-af
12 Todo get files name	3/27/2025 12:00 PM	Supervisor	Test connection		f2a29411-059b-4e37-9dc
13 Todo get files name	3/27/2025 12:00 PM	Supervisor	Test connection		83d63f7e-b60c-434b-8a

The page for editing an envelope record:

Subject is empty

Created on 3/14/2025 4:30 PM

Modified on 3/27/2025 12:00 PM

Created by Supervisor

Direction Outbound

Status Completed

Stages completed 2

Stages total 2

GENERAL INFORMATION

EVENT LOG

Connection setting

WhiteDoc envelope uid b5cb3d78-0bc5-40d3-b343-434d587a...

Entity

Created at 3/14/2025 4:30 PM

Received at

Sent at

WhiteDoc envelope flow

Attachments

Template setting Invoice

WhiteDoc envelope https://edo.whitedoc.ua/envelope/vi...

Sent by (Creatio)

Sent by (WhiteDoc) Олер Сергійович Дудкевич

Sent by mailbox (uid c59f876e-1e5a-4f22-b415-8a3a6ecf16d9 WhiteDoc)



## 2.1. Fields of the section

Field	Type	Description
Subject	String	The field contains the envelope subject name. Specified when sending the document.
Created on	Date	The field contains the envelope creation date.
Modified on	Date	The field contains the date of the last envelope modification.
Created by	Lookup «Contacts»	The field contains the contact who created the envelope.
Direction	Lookup «WhiteDoc. Envelope direction»	The field contains information about the envelope direction: <ul style="list-style-type: none"><li>• Incoming,</li><li>• Outgoing.</li></ul>
Status	Lookup «WhiteDoc. Envelope status»	The field contains the envelope status. The envelope status is updated from WhiteDoc. Envelope status management is done in the «WhiteDoc. Envelope status» lookup.
Stages completed	Integer	The field contains the number of stages the envelope has passed on the WhiteDoc side.
Stages total	Integer	The field contains the total number of envelope processing stages. Configured on the WhiteDoc side.
Connection setting	Lookup «Connection settings»	The field contains information about the setting according to which the envelope was received.
Template setting	Lookup «Template settings»	The field contains information about the template used when generating the envelope.
WhiteDoc Envelope UUID	String	Specifies the UUID of the envelope on the WhiteDoc side.



WhiteDoc Envelope	String	The field contains a link to the envelope in WhiteDoc.
Entity	Lookup «Used schema in workspace»	The field contains the name of the entity from which the envelope template content was formed.
Created by (system)	Lookup «Administration object»	Specifies the contact of the user-initiator of the envelope creation in Creatio.
Sent by (WhiteDoc)	String	Specifies the contact of the WhiteDoc user who generated the envelope.
Received at	Date/Time	The field contains the date and time the envelope was received in WhiteDoc.
Sent by mailbox (uuid WhiteDoc)	String	The field contains information about the UUID of the WhiteDoc mailbox used when sending the envelope. Specified when generating the envelope.
Sent at	Date/Time	The field contains the date and time the envelope was sent to WhiteDoc.

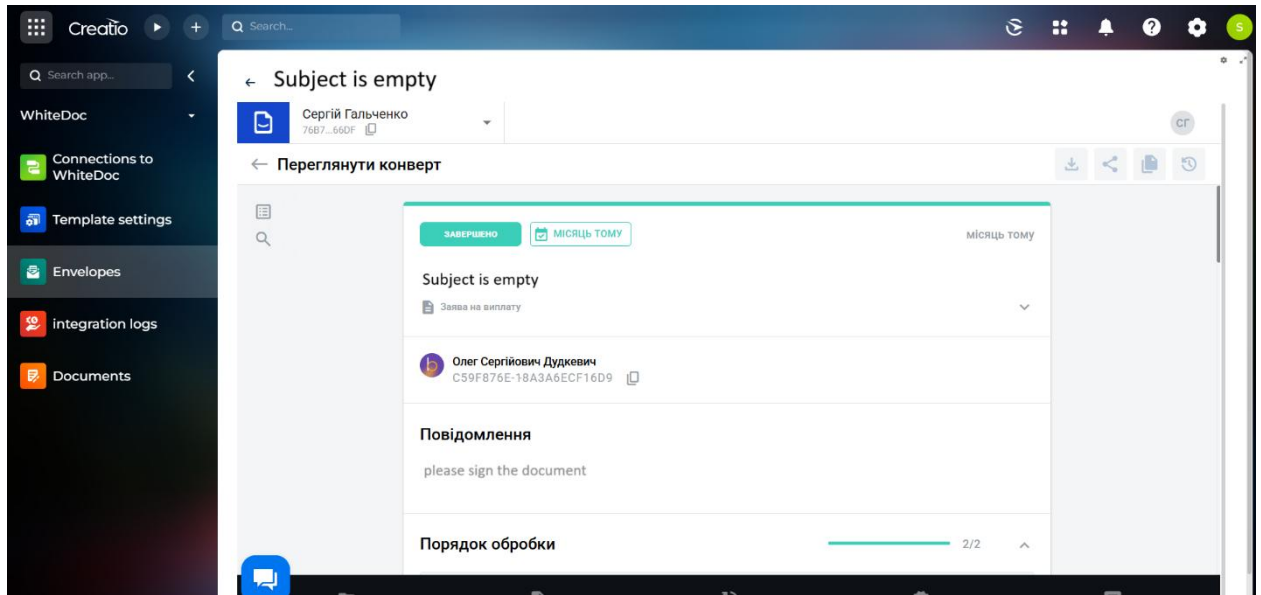
## 2.2. Viewing the envelope in WhiteDoc.

On the envelope editing page, it is possible to view the envelope directly in WhiteDoc.

To do this, click the button  on the editing page.

A WhiteDoc window will open with the current envelope's information.





## 2.3. Configuration Lookups:

### 2.3.1. WhiteDoc. Envelope status

The Lookups is used to manage envelope statuses and set up document archiving.

Structure:

Field	Type	Description
Name	String	Field used to display the envelope status on records in the «Envelopes» section.
Code	String	Field used for mapping envelope statuses between Creatio and WhiteDoc.
Final state	Boolean	Marks the final states of envelopes.
Is archive retrieval required	Boolean	True – if it is necessary to retrieve the document archive from WhiteDoc at this status.

## 2.4. Details.

### 2.4.1. Stages of the WhiteDoc envelope

Detail showing the envelope processing steps on the WhiteDoc side



## 2.4.2. Files

 Attachments    Search

<input type="checkbox"/>	Name	Created on	File size	+ ⋮
1	Agreement 1.docx	4/3/2025 11:50 AM	23,013	

The detail contains a list of the documents enclosed in the envelope.

The files are displayed in the details when the envelope recording is at the final stage - the "WhiteDoc. Envelope status" reference

Status mapping between Creatio and WhiteDoc is performed by the Code field.

## 2.4.3. Event log

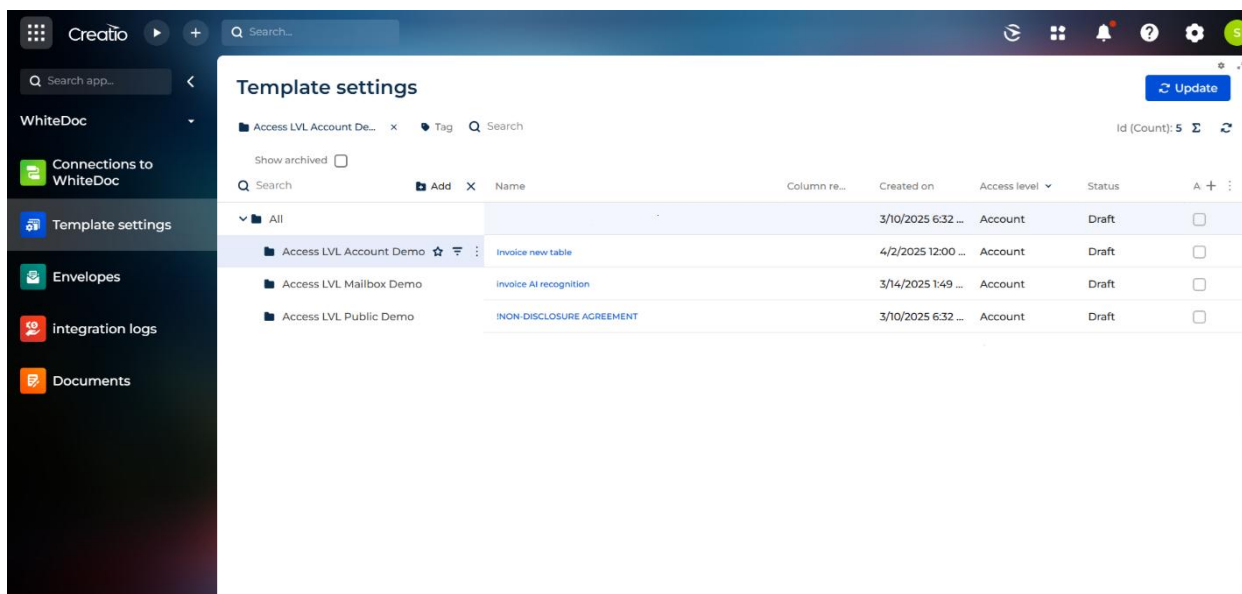
Logs of synchronisation of the current envelope with WhiteDoc are recorded on the part.



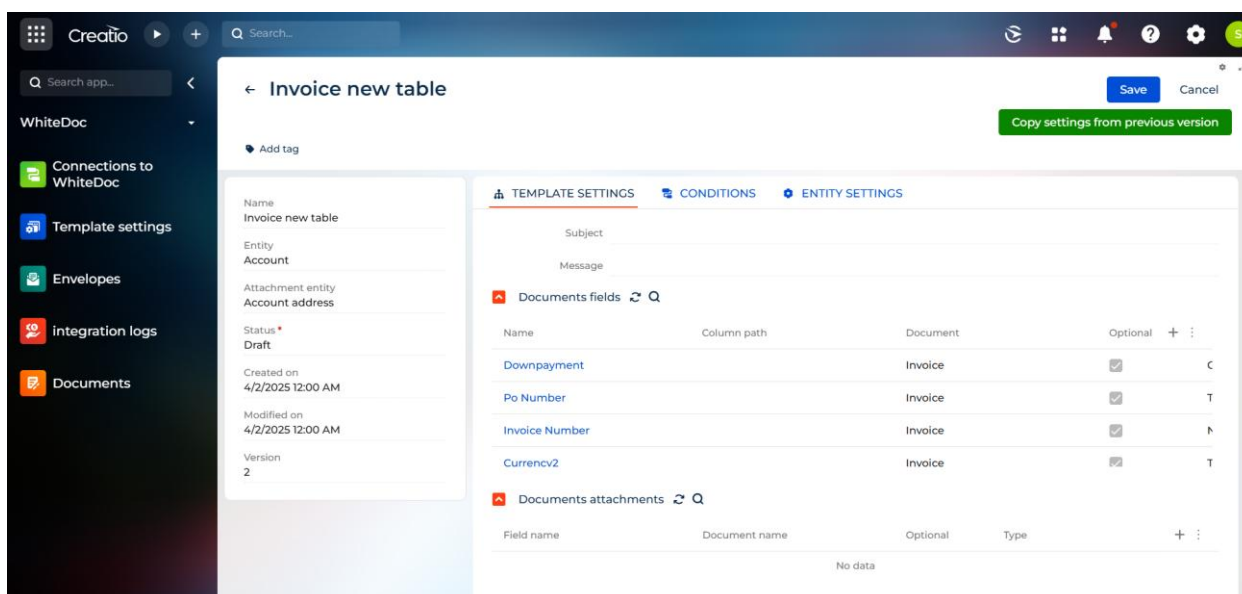
### 3. The Template Settings section.

This section contains a list of document templates.

Templates are created and sent to Creatio via integration with WhiteDoc.




#### Section editing page



#### 3.1. Fields of the section

Field	Type	Description
Name	String	The field contains the template name. Received from WhiteDoc.



Entity	Lookup «Used schema in workspace»	Specifies the Creatio object that will be used for mapping template fields.
Attachment Entity	Lookup «Used schema in workspace»	Specifies the Creatio object where attachment files (Uploaded file) are stored.
Created on	Date	The field contains the template creation date.
Modified on	Date	The field contains the date of the last template modification.
Version	Integer	The field contains the template version number. Changes if a new version is received during integration with WhiteDoc. When saving a new version, clicking the «Copy settings from previous version» button (  ) will automatically copy the field mapping that was already configured in the previous template version.
Subject	String	Contains the template subject. Configured on the WhiteDoc side, or can be specified when sending the envelope to WhiteDoc if this field is not filled in the template.
Message	String	Contains the message that will be displayed in the sent envelope with documents. Configured on the WhiteDoc side, or can be specified when sending the envelope to WhiteDoc if this field is not filled in the template.



## 3.2. Details

### 3.2.1. Document fields

Documents fields

Name	Column path	Document	Optional	+	:
Downpayment		Invoice	<input checked="" type="checkbox"/>		
Po Number	PONumber	Invoice	<input checked="" type="checkbox"/>		
Invoice Number	InvoiceNumber	Invoice	<input checked="" type="checkbox"/>		

The detail is used to configure the mapping of template fields from WhiteDoc to the fields of the selected object in Creatio.

The structure of the part:

Field	Description
Name	Name of the template field. Transmitted via integration from WhiteDoc.
Column path	Specifies the field of the selected Creatio object from which the value should be transferred to the corresponding WhiteDoc template field (field «Name»).
Document	Name of the document for which the template is generated. Transmitted via integration from WhiteDoc.
Optional	The field indicates whether filling the mapping for the selected field is optional. If fields not marked as optional are not filled in the template, the system will not allow changing the template status to «Active».
Type	Type of the template field. Transmitted via integration from WhiteDoc.

### 3.2.2. Documents attaching

Documents attachments

Field name	Document name	Optional	Type	+	:
81e3c557-fee3-480b-a877-0c15175...	invoice file	<input type="checkbox"/>	All		

The detail contains a list of attachments that will be transferred via integration with WhiteDoc in relation to the current template.



### 3.2.3. Flow role entry

Flow role entry

Type ^	Name	Active	From contacts	Mailbox UUID	+ ⋮
Assignee	Assignee	<input type="checkbox"/>	<input type="checkbox"/>	76B71390-0DF9-4402-B29D...	
Sender	Sender	<input type="checkbox"/>	<input type="checkbox"/>		

The detail contains a list of contacts responsible for processing the template.

The list of roles is configured on the WhiteDoc side.

When you double-click on a detail record, you can specify the mailbox of the contact who will receive a notification about the necessary action with the document.

Specify mailbox for the flow role

Q

Cancel Save

If a mailbox is not specified in the template, you will need to fill it in when creating the envelope.

### 3.2.4. Envelope fields

Envelope fields

Envelope column	Template entity column	+ ⋮
Envelope state	State Envelope	
+ New		

Detail for setting up the display of Envelope field values in the selected section (the "Linked object entity" field).

### 3.2.5. Filtering conditions

Actions ▾

☒ Type = Invoice payment

☒ AND

+ Add condition

A basic Creatio filter for setting the condition for applying a template to the object record selected in the Linked Entity field. The filter is configured for any field of the selected object.



## 4. Documents section

The Documents section is a preconfigured section of Creatio that is created when you install the WhiteDoc app.

This section is used to work with different types of documents in the Creatio system and sign them on the WhiteDoc side.

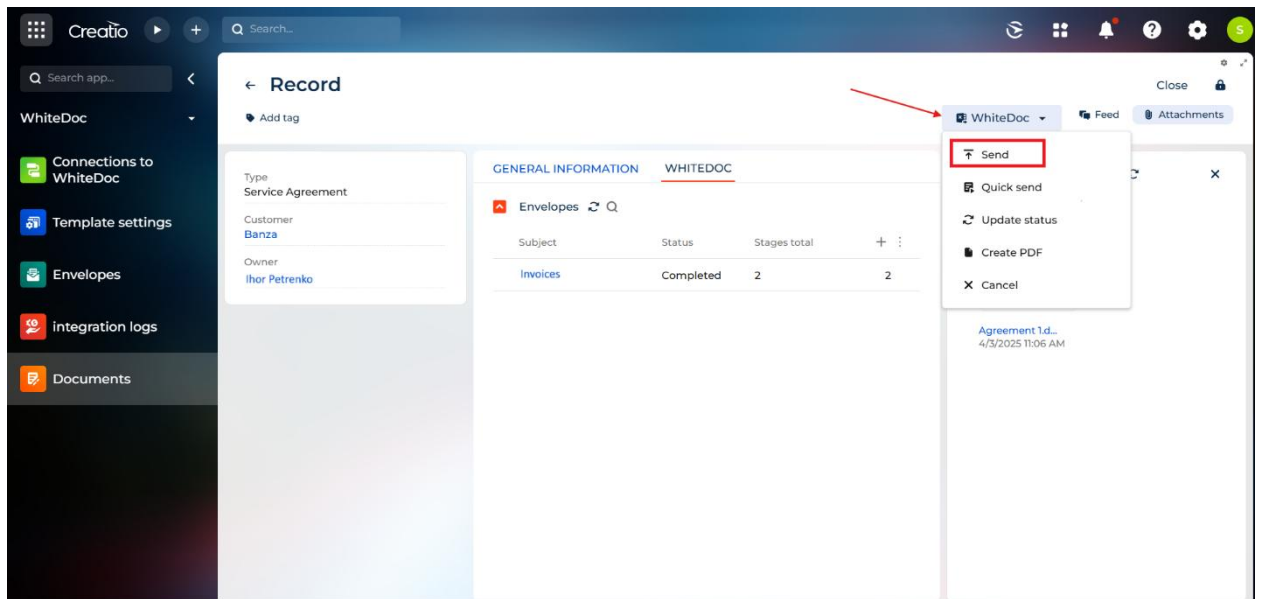
### Pre-configured section fields

Field	Description
Type	When creating a record, specify the document type: <ul style="list-style-type: none"><li>• Service Agreement,</li><li>• Lease Agreement,</li><li>• Invoice Payment.</li></ul>
Company	Specify the account for which the document is created.
Owner	Specify the contact who owns this document.

The Envelopes detail stores information about the list of envelopes in which the current document was included.

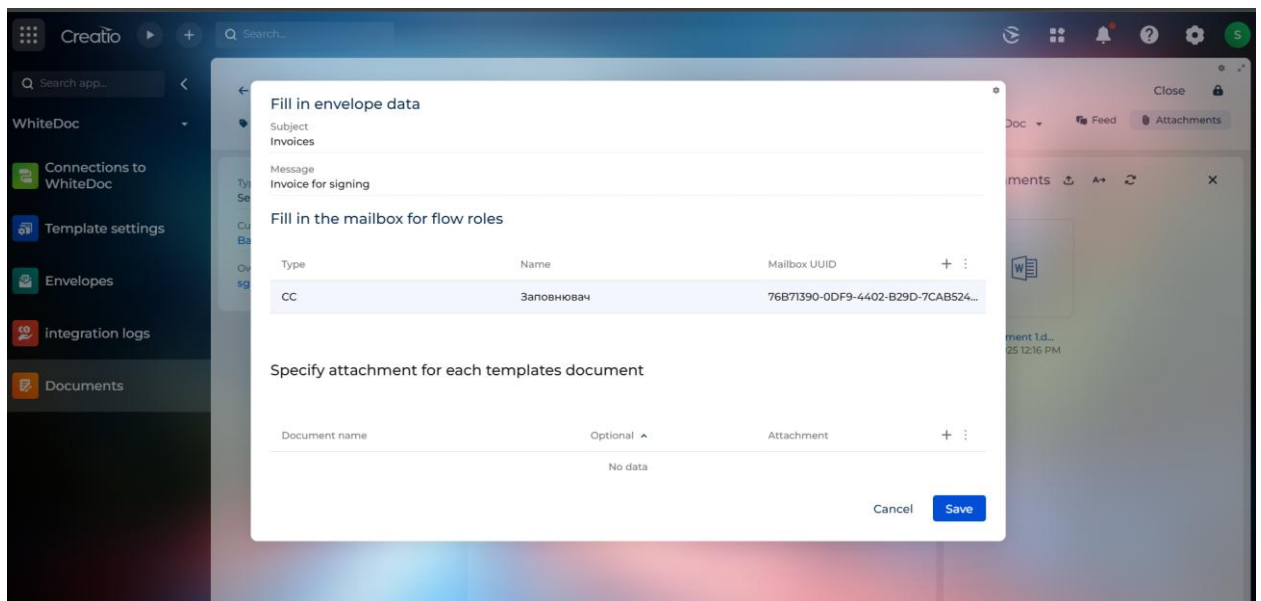
Sending a document to WhiteDoc:

1. After filling out and saving the document, send it to WhiteDoc for processing.
2. On the record page, open the WhiteDoc menu and select the Send action



3. In the new sending window, fill in the Subject and Message fields and specify the mailbox UUID if it was not specified by default when setting up the template.

Click Send.



4. WhiteDoc users will be notified if a new document needs to be processed according to their role rights.





## 5. WhiteDoc processes

A list of processes involved in the application functionality.

Process Name	Description
WhiteDoc. Actualize Templates by current connection	Designed to retrieve and update templates for the current user.
WhiteDoc. Actualize Templates by all connections	Designed to retrieve and update templates for all active connections.
WhiteDoc. Quick send Envelope	Process responsible for quick sending from the attachments of the current record from which the BP was 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 connections to WhiteDoc.
WhiteDoc. Copy Template setting from previous version	Process for copying Template settings from the previous version.
WhiteDoc. Read Entity from cache	Process for retrieving entity information from the redis cache.
WhiteDoc. Check and get Envelope data	Process for checking filled data before sending the Envelope.
WhiteDoc. Update Envelope status	Process for updating the Envelope status.
WhiteDoc. Add webhook on	Designed to add a webhook for changing the Envelope status.



Envelope status changed	
WhiteDoc. Cancel active Envelope by Entity	Designed to cancel an Envelope from the linked entity.
WhiteDoc. Cancel Envelope	Designed to cancel an Envelope.
WhiteDoc. Copy Envelope files to master Entity	Process for copying Envelope files to the linked entity.
WhiteDoc. Get Envelope archive	Process for retrieving the 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 last final Envelope by the linked entity.
WhiteDoc. Update active Envelope status by Entity	Designed to update the status of the current active Envelope by the linked entity.