

## Psiog Docusign Integration for Creatio Documentation

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## 1. Document Info

<b>Software Release:</b>	<b>V2.0</b>
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File Name:	Psiog Docusign Integration for Creatio Documentation

## 2. Revision History

S No	Date of Modification	Change Made
1	21 July 2023	Document V1
2	31 May 2024	Upgraded to Freedom UI compatible
3	10 September 2025	Added decline handling and auto-attachment of signed document to parent record

## 3. Purpose

The document is intended to provide functional and technical information about the integration to help Users, Docusign Admin and Creatio Developers understand the functionalities and configure settings.

## 4. Plug-in Information

The DocuSign integration is designed to integrate Creatio with the DocuSign website. This integrator enables users to send documents that need to be digitally signed directly from Creatio both classic UI and freedom UI.

## 5. Build Information

S No	Particular	Details
1	Version	2.1.2509.10
2	Creatio Version Compatibility	7.18 +
3	Creatio Product	Across all products
4	Database	Postgres, SQL Server
5	Operating System	Windows 10/11
6	Platform	.NET Framework 4.7
7	Dependent Package	Product Core / CrtCore
8	Environments supported	Cloud

## 6. Features

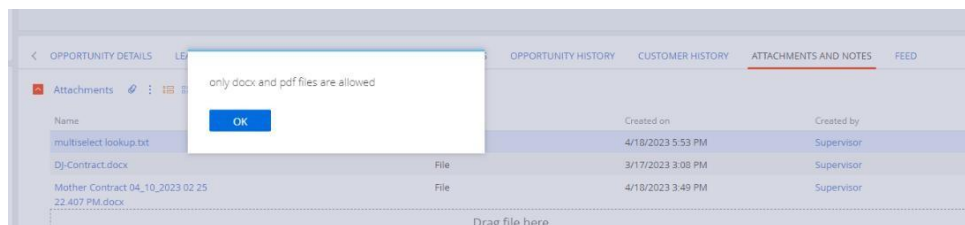
1. User can send multiple documents at a time within a single request to DocuSign for e-signatures ( Classic UI only )
2. Users have the option to choose where the signatories can sign. They can either allow the signatory to choose their own signature placement or fix the signature placement at the bottom of the document. If the signature placement is fixed at the bottom, it can be applied to all pages or only the last page.
3. Users can see all the requests in "DocuSign Requests" section and track the status of each request.
4. Retry functionality is available any attempt fails to send request due to unforeseen circumstances.
5. User has the option to choose between using a Single DocuSign account for the entire Creatio instance or using multiple individual DocuSign accounts for different users within the instance.

**Note:** Users can find this in "DocuSign Requests" section page.

**Note:** If DocuSign accounts are individual, the "PsgDsSingleUserId" system setting value should be false, and in the "DocuSign Userids" lookup, each contact should be mapped to only one user id. If the entire Creatio instance has only one user id, then the "PsgDsSingleUserId" value should be true, and the "PsgDSUserId" system setting should be filled with the DocuSign user id.

## 7. Control Points

1.



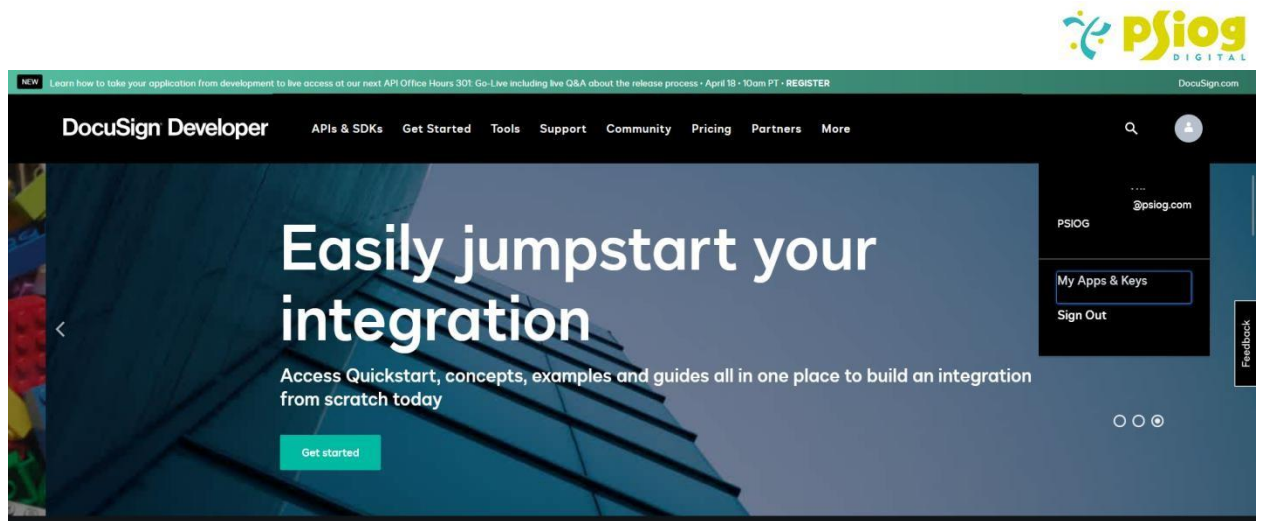
The DocuSign integration is designed to exclusively support PDF and DOCX file formats for sending documents to signatories. If you attempt to send any other file format, you will receive an error message indicating that "only PDF and DOCX files are allowed".

## 8. Configuration

### 8.1 Configuring DocuSign Account for Creatio.

If you already have a DocuSign account, skip to step 3.

1. Create a DocuSign account if you don't already have one.
2. Log in to your DocuSign account.
3. Navigate to "My Apps & Keys" (located near the profile button).



4. Click "Add App and Integration Key."

#### Apps and Integration Keys

ADD APP AND INTEGRATION KEY

App Name	Integration Key	Environment	Go Live Status
----------	-----------------	-------------	----------------

5. Enter an app name (e.g., "Creatio Application") and click "OK."

#### General Info

App Name \*

Creatio Application

Integration Key

9c3b0a09-9e94-41c4-991e-95d33dd629b1



6. Click "Generate RSA" and copy the "PRIVATE KEY" to a safe location. Note that this private key will be shown only once.



#### Service Integration

DocuSign can generate a keypair for you or you can upload your own public key.

#### RSA Keypairs (ID)

6aac5217-29bc-42ec-af6c-121b9461

+ GENERATE  
RSA

+ UPLOAD  
RSA

RSA Keypair

-----BEGIN PUBLIC KEY-----

KZ+vguM+7MhJfisd15y1UPjfkILDpSmS+nhX5IeLUx5wtEL72hN5b8/AIO4cqApQ99ABZ/igJNlmSmi2KSIJx74kAeK9+AX0jqKQ3ySVvyas4u6ER2en1zFMK31GdtQD/Qu5vSKJmEUot082FScSD5FG5TYL9g/dgYDFHwjN/DK1rV4IycSw7Vvwyd0+j0RQIDAQAB

-----END PUBLIC KEY-----

Private Key

-----BEGIN RSA PRIVATE KEY-----

MIIEpAIBAAKCAQEAU0TfQeszt2nfBpis+EPqUZYfg/z+jUB+k+RdIvnzoK9/qJre9koH6Y7WvPw65GI+NkVjddXo2sQnVYsRRt4yeZ+Jq9FquIMSknC4QhiTMYL0eZ+wRDjqvD3ESeRdWzEb5mrhakqajTh8ozvR8KZ+vguM+7MhJfisd15y1UPjfkILDpSmS+nhX5IeLUx5wtEL72hN5b8/AIO4cqApQ99ABZ/igJNlmSmi2KSIJx74kAeK9+AX0jqKQ3ySVvyas4u6ER2en1zFMK31GdtQD/Qu5vSKJmEUot082FScSD5FG5TYL9g/dgYDFHwjN/DK1rV4IycSw7Vvwyd0+j0RQIDAQABAOIBABm1Wz76Wme61/GUjNBDE57uRhenOvxBrEH+6Nj1Ek00QpcyPdZ6TaMtQsN00EwoayXUckqw+ETLFPS6kmNU/ZMTsRwP0b0ewtdPH+NIgW64fKov+C2KTEu/Pe0YYHFYvBphcMiNMTxdCkb0uSDBUxzrVN0D6UVWcW4QpJx3yYubMm3z6DsaP3Q9So1XySmu7RZPYSWZuuFgqWAqxTL4ZgGazobLpMhWhew1uvAY7MWJRgWdGGfY4IvjQNq5kEqEF2qNC/GMN7QriE3WE90E4LLv7z4I3LKONf1tmOqUT/mYjr3TqAvfVsw+nk1kDQj7T2JInG4rOrgEtKQ

- Add the redirect URL: <https://<creatio domain>> Example: <https://mycreatio.com>

## Additional settings

### Redirect URIs

×

<https://mycreatio.com>

+

ADD URI

### Link to Privacy Policy

<http://www.example.com/privacy>

### Link to Terms of Use

<http://www.example.com/terms>

- Click "Save."
- Take note of the "User Id," "Integration Key," and the "PRIVATE KEY."

^ My Account Information

User ID

API Account ID

Account Base URI

61-4ad2-a9d

Apps and Integration Keys

ADD APP AND INTEGRATION KEY

App Name	Integration Key	Environment	Go Live Status	
Creatio Application		Development	<input type="radio"/> Submit for review	<div>ACTIONS</div>

10. Every new user in DocuSign must provide consent.

11. \*Open a browser and enter this URL:

**https://<basepath>/oauth/auth?response\_type=code&scope=signature%20impersonation&client\_id=<INTEGRATIONKEY>&redirect\_uri=<Redirect URL>**

Basepath: (Developer Account)- account-d.docusign.com

(Regular Account)- account.docusign.com

Example: **https://account-**

**d.docusign.com/oauth/auth?response\_type=code&scope=signature%20impersonation&client\_id=7acf444d-653b-4a37-b747-**

**efc88b13629e&redirect\_uri=https://mycreatio.com**

12. After navigating through the URL, sign in with your DocuSign account credentials and click "Allow Access."

## DocuSign®

### demo is Requesting Permission

- This application will be permitted to request access to your account without you being present.
- Create and send envelopes. Obtain links for starting signing sessions.

The application you are connecting to is not provided by DocuSign, Inc. By selecting **ALLOW ACCESS**, you are allowing the application to use your information in accordance with their respective [terms of service](#) and [privacy policies](#).

ALLOW ACCESS

CANCEL

**Note:** Repeat steps 11 and 12 for each new user and app (new integration key).


## 8.2 Configuring DocuSign in Creatio (Admin)


Once DocuSign Account is configured for Creatio, the steps below should be followed.

1. Login into Creatio instance
2. Open System Settings
3. Open “PsgDSDomain” system setting and enter DocuSign Url  
<https://account.docusign.com> (Regular account)  
<https://account-d.docusign.com> (Developer account)

Name ^	Code
DocuSign Domain Url	PsgDSDomain
DocuSign has Single UserId	PsgDSISingleUserId
DocuSign Integration Key	PsgDSIntegrationKey
DocuSign Private Key	PsgDSPrivateKey
DocuSign UserId	PsgDSUserId
<a href="#">OPEN</a> <a href="#">COPY</a> <a href="#">DELETE</a>	

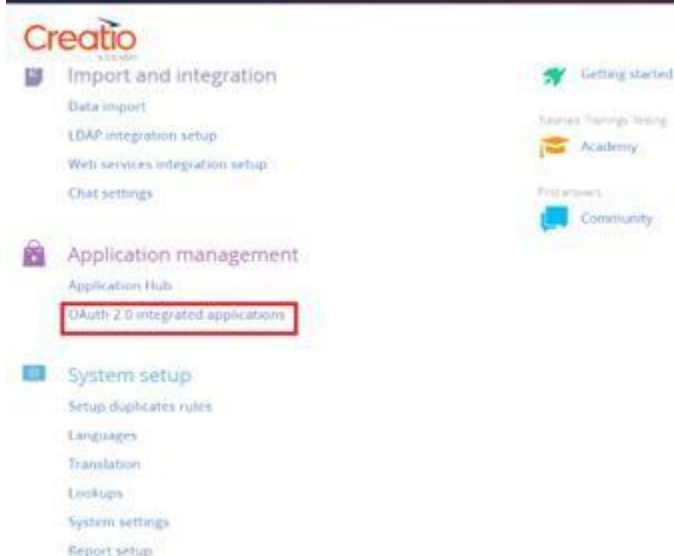
4. Enter “INTEGRATION KEY” in “PsgDSIntegrationKey” system setting.
5. Enter “PRIVATE KEY” in “PsgDSPrivateKey” system setting.
6. If entire Creatio instance has to use one user id, then change “PsgDSISingleUserId” system setting value to true.
7. Enter “USER ID” in “PsgDSUserId” system setting.
8. If each contact has individual DocuSign Accounts, then skip step 6,7
9. Map DocuSign UserIds in lookup “DocuSign UserIds”.

<div>  Name Contains docusi X </div>
DocuSign UserIds

Lookups	
<a href="#">NEW</a> <a href="#">CLOSE</a> <a href="#">ACTIONS</a>	
DocuSign UserIds	
 Filters/folders	
Contact	UserId
Supervisor	339ba1a7-fe61-4ad2-a9dd-9f80ce9443



10. Navigate to “OAuth 2.0 integrated applications” in settings and open it.



11. Click on “New”



12. Fill the required values as follows

Name: **DocuSign Integration**,  
 Application URL: <URL entered in step3>  
 System User: <contact of system admin>

DocuSign Integration

**SAVE** **CANCEL**

---

**Basic information**

Name\* DocuSign Integration

Application URL\* https://account-d.docusign.com

Description

Created on Active ☒

---

**OAuth client credentials**

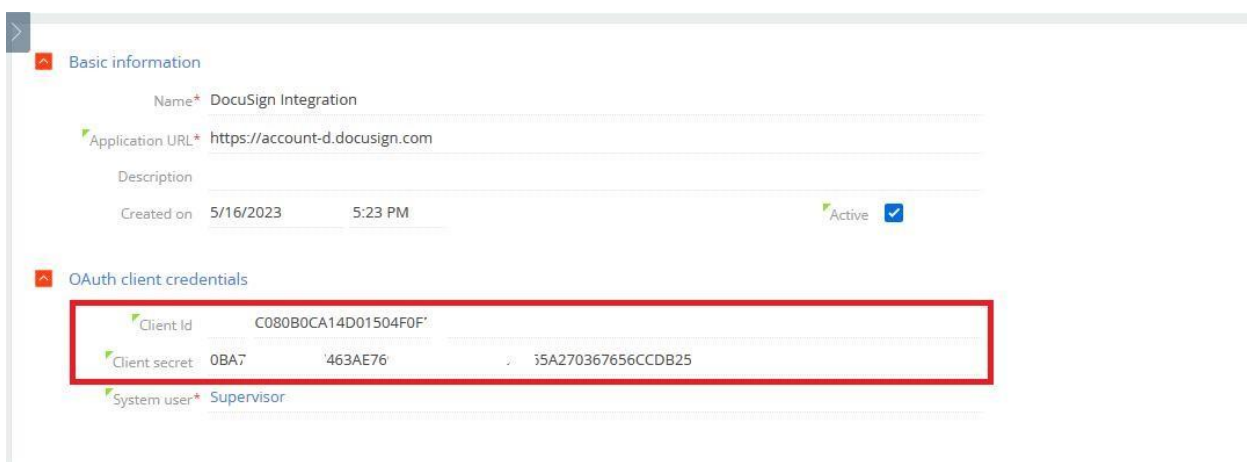
Client Id

Client secret

System user\* Supervisor

Click on save.

13. Client Id & Client secret will be generated automatically. Copy these values.



**Basic information**

Name\* DocuSign Integration

Application URL\* https://account-d.docuSign.com

Description

Created on 5/16/2023 5:23 PM

Active ☒

**OAuth client credentials**

Client Id C080B0CA14D01504F0F

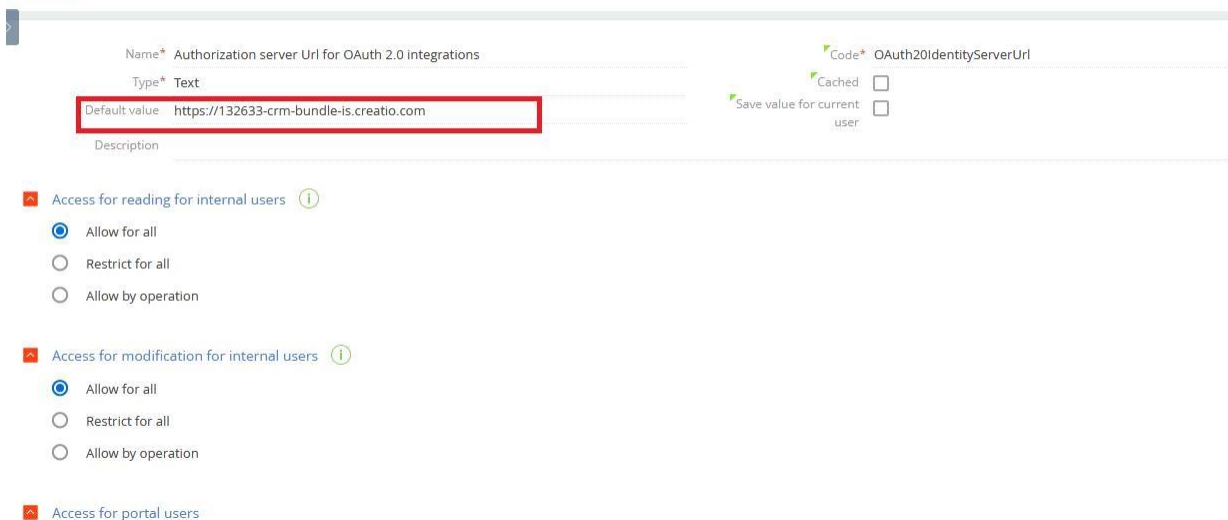
Client secret 0BA7 463AE76 55A270367656CCDB25

System user\* Supervisor

14. In the system settings Open “**Authorization server Url for OAuth 2.0 integrations**” and copy the value

Authorization server Url for OAuth 2.0 integrations

CLOSE



Name\* Authorization server Url for OAuth 2.0 integrations

Type\* Text

Default value https://132633-crm-bundle-is.creatio.com

Description

Code\* OAuth20IdentityServerUrl

Cached ☐

Save value for current user ☐

**Access for reading for internal users** ⓘ

☒ Allow for all

☐ Restrict for all

☐ Allow by operation

**Access for modification for internal users** ⓘ

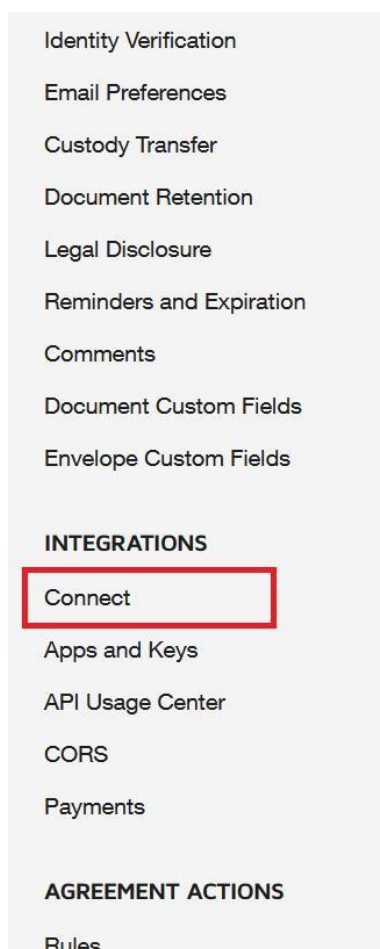
☒ Allow for all

☐ Restrict for all

☐ Allow by operation

**Access for portal users**

15. Open DocuSign and open “**MyApps&Keys**”. Open “**Connect**” in “**Integrations**” section.



16. Go to **OAuth 2.0** tab in “**CONNECT**” check “**Enable OAuth**”  
Enter Client ID, Client secret that are copied from creatio (step 13)  
Enter Authorization Server URL as **<System setting value copied from step14>/connect/token**  
Example: <https://056427-sales-enterprise-is.creatio.com/connect/token>

DocuSign Connect is a push service that sends real-time data updates to external applications.

[CONFIGURATIONS](#) [CONNECT KEYS](#) [OAUTH 2.0](#) [PUBLISH](#) [LOGS](#) [FAILURES](#) [DASHBOARD](#)

Protect your custom Connect configurations with enhanced security by enabling OAuth. OAuth can ensure that a push notification has been sent from Do your application. Enter the Client ID, Client Secret and Authorization Server URL generated by your authorization server.

For more information, see [Connect OAuth](#).

☒ Enable OAuth

**Client ID \***  
1500DECF796B6CFFC8156FA2847F2A98

**Client Secret \***  
\*\*\*\*\*

**Authorization Server URL \***  
https://134888-crm-bundle-is.creatio.com/connect/token

### Custom Parameters (Optional)

DocuSign requires the following OAuth parameters: Client ID, Client Secret, and Authorization Server URL. Add custom parameter name/value pairs to pass these additional parameters to your authorization server if needed

[+ ADD CUSTOM PARAMETER](#)

[SAVE](#)

Click "Save"

17. Click on "Add Configuration" and Click "Custom"

### Connect

DocuSign Connect is a push service that sends real-time data updates to external applications.

[CONFIGURATIONS](#) [CONNECT KEYS](#) [OAUTH 2.0](#) [PUBLISH](#) [LOGS](#) [FAILURES](#) [DASHBOARD](#)

[New application configurations including Box, OneDrive, Google Drive and Dropbox can be created in Agreement Actions.](#)

[ADD CONFIGURATION](#)

Custom

Custom Recipient

Box

Salesforce

OneDrive

eOriginal

Legacy formats >

Configuration ID

Status

Failures

10387408

Inactive

10415326

Active

0

Enter Name: Creatio

URL to Publish:

https://<creatiodomain>/0/rest/PsgDocuSignService/EnvelopeCompleted

**Example:** <https://056427-sales-enterprise.creatio.com/0/rest/PsgDocuSignService/EnvelopeCompleted>

### Listener Settings

Status

Active Connection ▼

Name \*

Creatio

URL to Publish \*

atio.com/0/rest/PsgDocuSignService/EnvelopeCompleted

HTTPS required

☒ Enable Log (maximum 100)

☒ Require Acknowledgement

18. Under Trigger events expand **Envelope and Recipients** and check

- “Envelope Signed/Completed”,
- “Recipient Signed/Completed”,
- “Recipient Declined”,
- under “Include Data” check “Recipients”

#### ^ Envelope and Recipients

##### Envelope Events:

☐ Envelope Sent

☐ Envelope Delivered

☒ Envelope Signed/Completed

☐ Envelope Declined

☐ Envelope Voided

☐ Envelope Resent

☐ Envelope Corrected

☐ Envelope Purge

☐ Envelope Deleted

☐ Envelope Discard

☐ Envelope Created

☐ Envelope Removed

##### Recipient Events:

☐ Recipient Sent

☐ Recipient Auto Responded

☐ Recipient Delivered

☒ Recipient Signed/Completed

☒ Recipient Declined

☐ Recipient Authentication Failure

☐ Recipient Resent

☐ Recipient Delegate

☐ Recipient Reassign

☐ Recipient Finish Later

☐ Custom Fields  
☐ Documents  
☐ Attachments  
☐ Extensions  
☐ Folders  
☒ Recipients  
☐ Powerform  
☐ Tabs  
☐ Payment Tabs  
☐ Prefill Tabs

**JSON Payload Sample (trimmed)**

```

{
  "event": "recipient-sent",
  "uri": "/restapi/{apiVersion}/accounts/{accountId}/envelopes/{envelopeId}",
  "retryCount": "0",
  "configurationId": "xxxxxxx",
  "apiVersion": "v2.1",
  "generatedDateTime": "",
  "data": {
    "accountId": "xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx",
    "recipientId": "1",
    "envelopeId": "xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx",
    "envelopeSummary": {
      "status": "sent",
      "emailSubject": "API Demo subject",
      "emailBlurb": "Please sign this Demo Envelope",
      "signingLocation": "online",
      "enableWetSign": "true",
      "allowMarkup": "false",
      "allowReassign": "true",
      "createdDateTime": "2019-12-12T18:23:36.680000Z",
      "lastModifiedDateTime": "2019-12-12T18:23:36.697000Z",
      "statusChangedDateTime": "2019-12-12T18:23:36.680000Z",
      "useDisclosure": "false",
      "sender": {
        "userName": "John Smith",
        "userId": "xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx",
        "accountId": "xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx",
        "email": "johnsmith@docusign.com",
      },
    },
    "recipients": {...},
    "envelopeDocuments": [
      {
        "documentId": "1",
        "documentIdGuid": "xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx"
      }
    ]
  }
}

```

19. Under “ Integration and Security Settings ” check “Include OAuth (Recommended)”

## Integration and Security Settings

☐ Include HMAC Signature (Recommended) ?  
 Use a hash to verify message authenticity

MANAGE KEYS

☒ Include OAuth (Recommended) ?  
 Protect your custom Connect configurations with enhanced security by enabling OAuth.

MANAGE OAUTH

☐ Include Basic Authentication Header  
 Add a username and password to the header to verify message authenticity.

☐ Enable Mutual TLS

Click on “SAVE CONFIGURATION”

### 8.3 System Settings

All system settings related to the plugin can be found in the folder “DocuSign System settings” folder in System settings section.

S No	Name	Code	Description
1	DocuSign Domain Url	PsgDSDomain	<ol style="list-style-type: none"> <li>Domain URL of the DocuSign account</li> <li>Example: <a href="https://account-d.docusign.com">https://account-d.docusign.com</a> (developers)</li> <li>Example: <a href="https://account.docusign.com">https://account.docusign.com</a> (Normal Users)</li> </ol>
2	DocuSign has Single UserId	PsgDSIsSingle UserId	<ol style="list-style-type: none"> <li>Change the value to true if entire Creatio instance has only one user id</li> </ol>
3	DocuSign UserId	PsgDSUserId	<ol style="list-style-type: none"> <li>If entire Creatio instance has only one user id then fill this value with the DocuSign UserId.</li> </ol>
4	DocuSign Integration Key	PsgDSIntegrationKey	Integration key from DocuSign Website
5	DocuSign Private Key	PsgDSPrivateKey	Private key from DocuSign Website

Following lookup needs to be configured.

1.Enable Send To DocuSign Button.

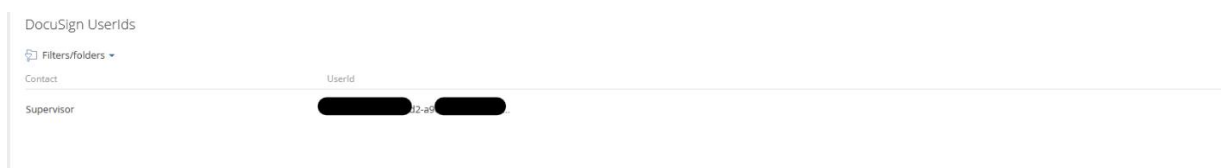
**Name of lookup:** DocuSign UserIds

**Code:** PsgDocuSignUserIds

**Structure:**

S No	Column Title	Column Code	Type	Description
1	Contact	PsgContact	Lookup	Lookup to pick the contacts to configure DocuSign User Id
2	User Id	PsgUserId	String	DocuSign UserId mapped to particular user.

**Example:**



**Note:** Ensure that each contact is only mapped to one user ID. This helps prevent any confusion or errors that may arise from multiple contacts being assigned to the same user ID or vice versa.

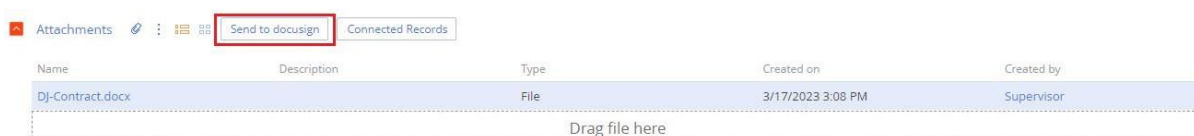
## 9. Walk-through

### 9.1 Classic UI

1. Open the section in Creatio that contains the attachments you want to send for signing. Select the documents that need to be signed.

**Note:** Only docx and pdf type of files are allowed.

2. Click “Send to docusign”



3. Add Email Subject and Signatories (To whom user wants to send documents for signing)



4. To decide the order of signing, you can use the "Signing Order" field which allows you to specify the order in which the signatories should sign the document(s). The lower the number, the higher the priority for signing.

For example, if there are two signatories and you want the first signatory to sign first, you can assign the value "1" to the first signatory and "2" to the second signatory. This way, the first signatory will receive the document(s) first for signing.

You can change the signing order by updating the values in the "Signing Order" field for each signatory.

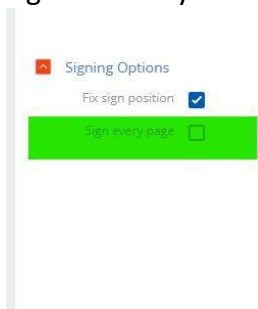
5. In Signing options:

If “Fix sign position” is not checked then signatory can place their signature any where in the document.





- If “Fix sign position” is checked then Signatory should place their signature only at the bottom of the page. If “Sign all pages” field is not checked then signatory can place their signature only at the bottom of last page.

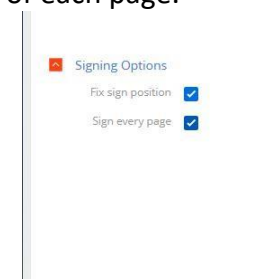


Signing Options

Fix sign position ☒

Sign every page ☐

- If “Sign every page” field is checked then signatory should sign all pages at the bottom of each page.

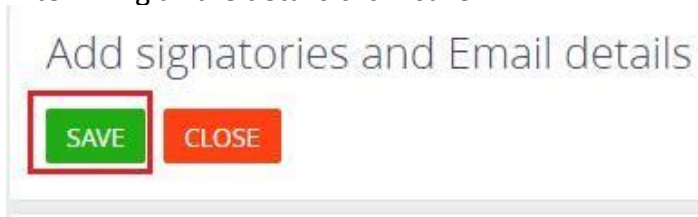


Signing Options

Fix sign position ☒

Sign every page ☒

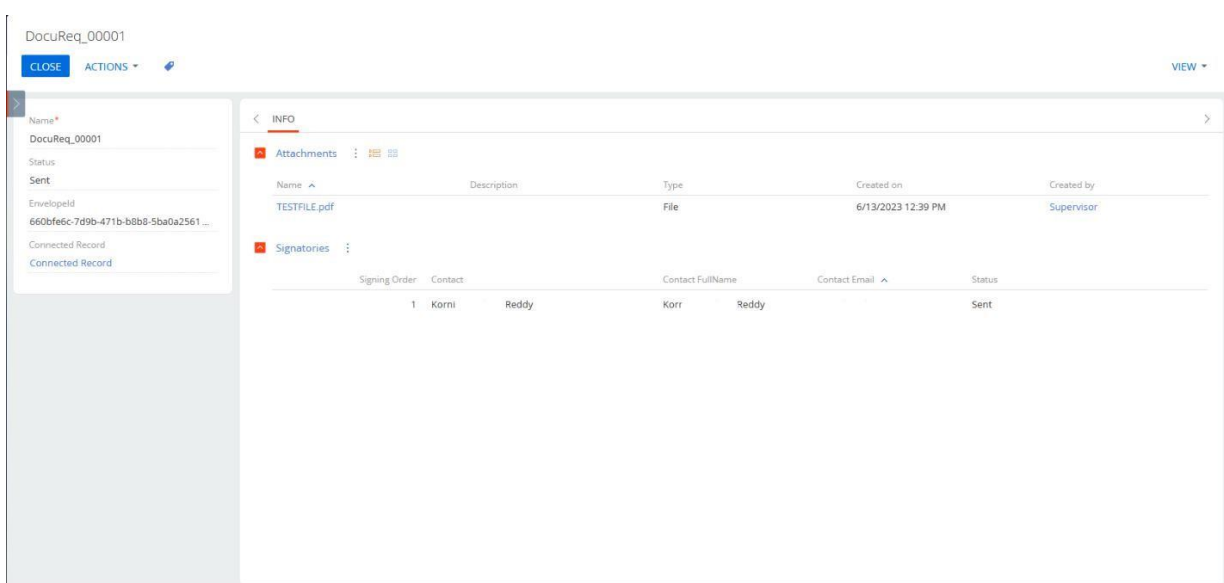
- After filling all the details click “save”




Add signatories and Email details

**SAVE** **CLOSE**

- After clicking save, mail will be sent to signatories according to their signing order by email. User can check the details of the Request on DocuSign Requests section page.



DocuReq\_00001

**CLOSE** **ACTIONS** 

**VIEW**

Name\*  
DocuReq\_00001

Status

Sent  
EnvelopeId  
660bfe6c-7d9b-471b-b8b8-5ba0a2561...

Connected Record  
Connected Record

**INFO**

**Attachments**

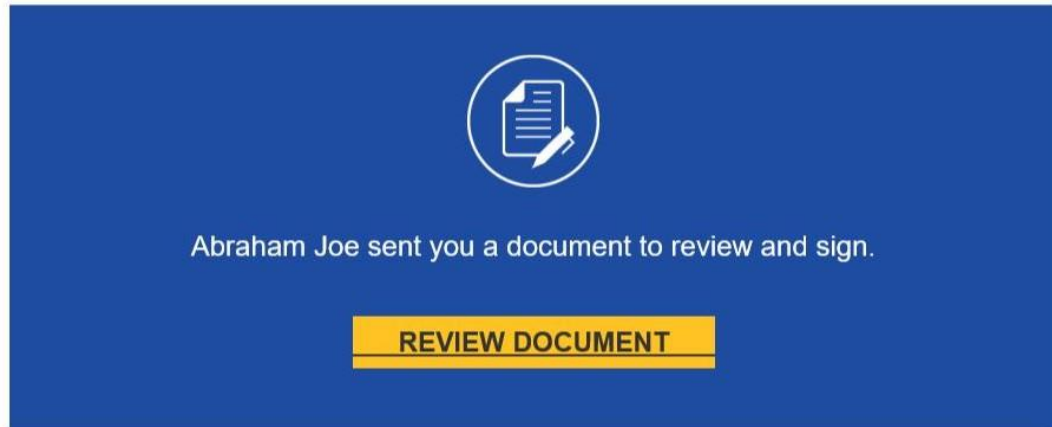
Name	Description	Type	Created on	Created by
TESTFILE.pdf		File	6/13/2023 12:39 PM	Supervisor

**Signatories**

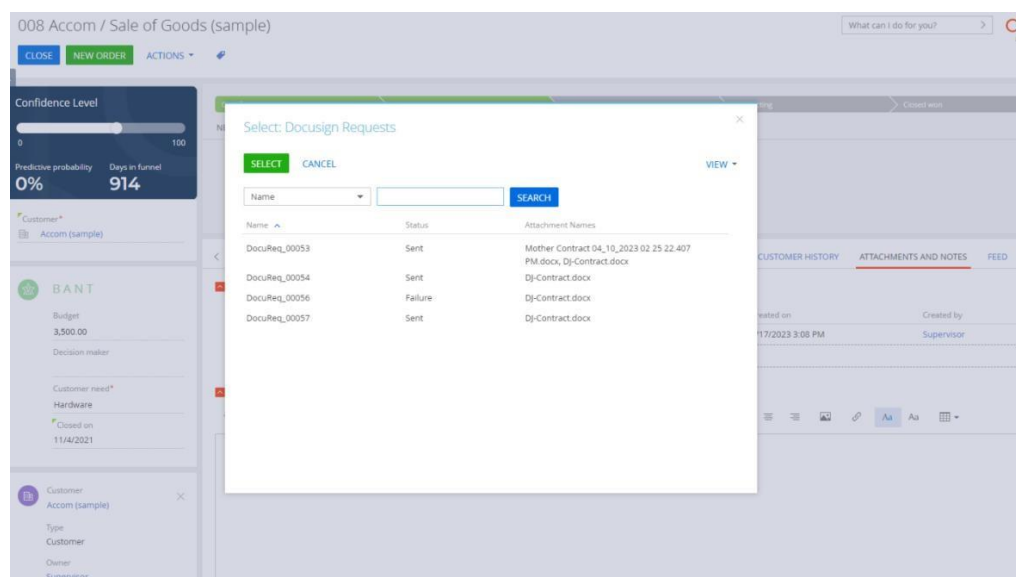
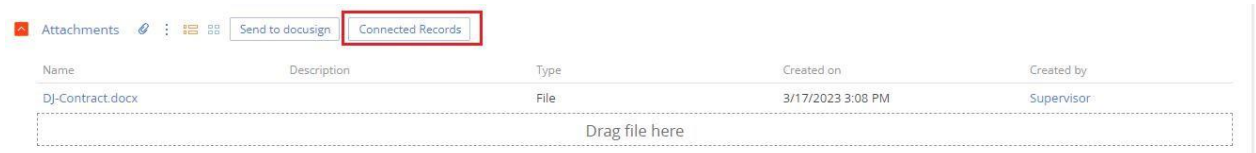
Signing Order	Contact	Contact FullName	Contact Email	Status
1	Korri Reddy	Korri Reddy		Sent

10. Users can check the Status of the DocuSign Request status, DocuSign Envelope Id.
11. If a User clicks on Connected Record, creatio will open the record page from where the request is sent.
12. Users can check individual status of each signatory in “Signatories” tab.
13. Signatory will receive mail like this

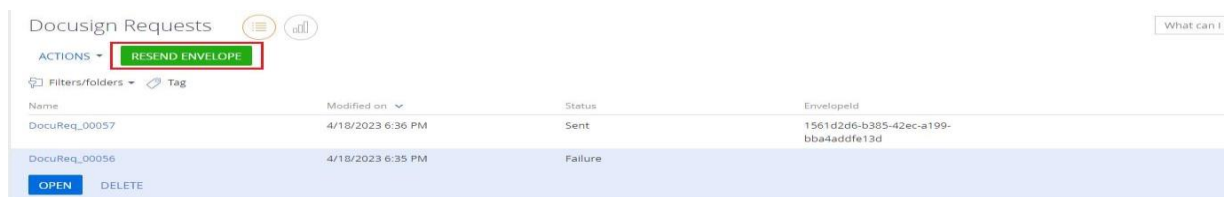
**DocuSign**



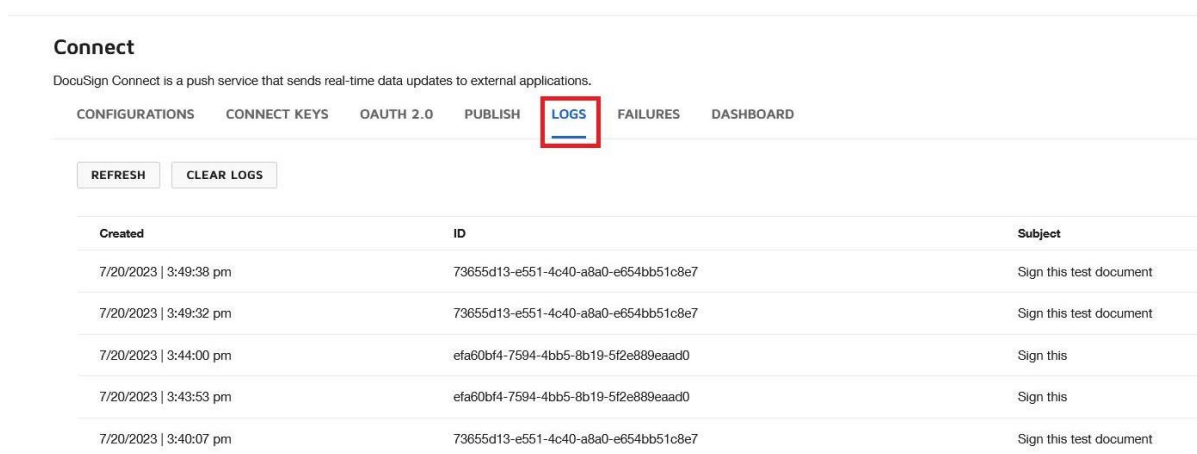
14. They should click on “Review Document” button and complete the signing process, click “Finish”.
15. After everyone finishes the signing process status of the request will be “Completed” and Signed document will be attached in the “Attachments” tab.
16. In the Attachment detail, if user clicks the connected records button. One popup will open containing all the DocuSign Requests sent from that record.



17. User select/double click on any record , creatio will navigate to that DocuSign Record.
18. If there is any error that occurs while sending envelope, status in “DocuSign Requests” will be updated to “failure”. You can resend the request by clicking “RESEND ENVELOPE” on the section page.



Note: If any error occurs while receiving signed documents back to creatio from the docusign, you can check the logs in docusign website.  
Goto: Settings >> Connect >> Logs



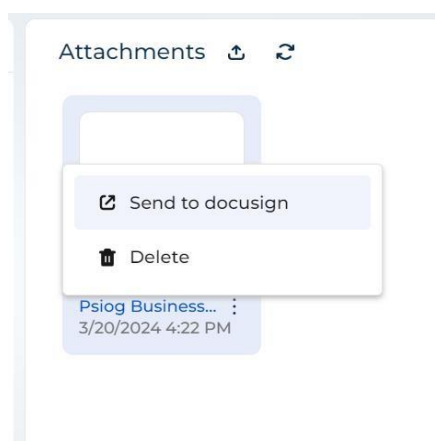
You can check the error in Log details. If you find this type of error: “invalid\_client”, check the client id, client secret in oauth tab.



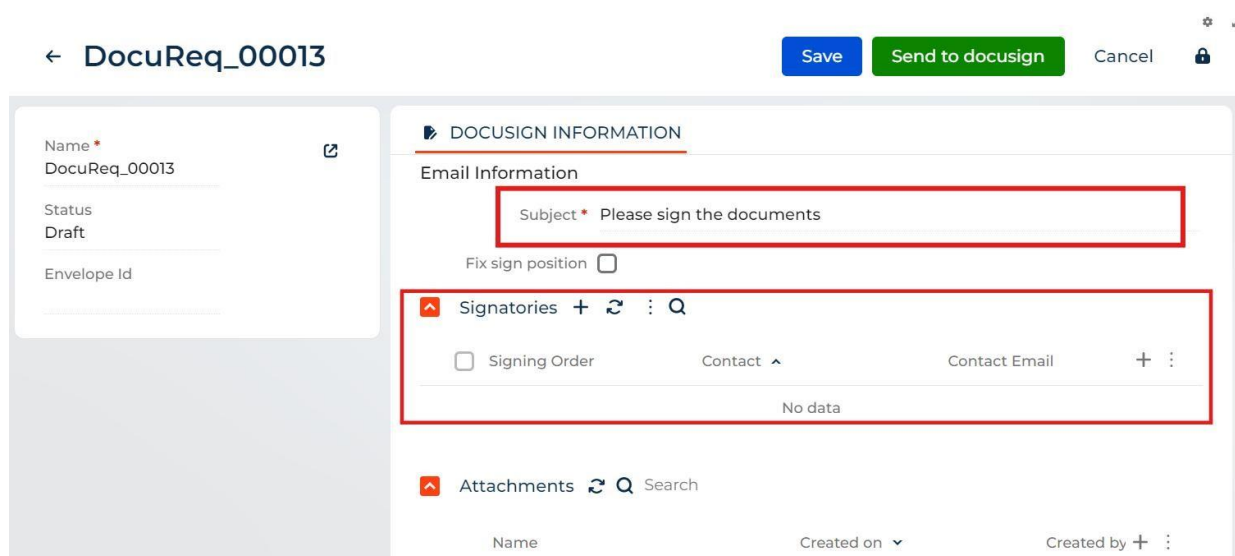
## 9.2 Walk-through - Freedom UI

1. Open the section in Creatio that contains the attachments you want to send for signing. Select the document that need to be signed.  
**Note:** Only docx and pdf type of files are allowed.

2. Click on the three dots you see for each attachment and click on the “Send to docusign” button.



3. Add email Subject and Signatories (To whom user wants to send documents for signing) when the status is in “Draft”.



The screenshot shows the 'DocuReq\_00013' form. On the left, there's a sidebar with fields: 'Name' (DocuReq\_00013), 'Status' (Draft), and 'Envelope Id'. On the right, the 'DOCUSIGN INFORMATION' section is expanded. It contains an 'Email Information' section with a 'Subject' field containing 'Please sign the documents'. Below this is a 'Fix sign position' checkbox. The 'Signatories' section is also expanded, showing a table with columns: 'Signing Order', 'Contact', and 'Contact Email'. The table is currently empty, with a 'No data' message at the bottom. At the bottom of the form, there's an 'Attachments' section with a search bar and a table with columns: 'Name', 'Created on', and 'Created by'.

4. Multiple signatories can be added at once. Signing order should be filled after adding the signatories.

Select contacts to add to the signatories
✕

Q Search

Full name ^
+

☒ Alice Phillips

☒ Andrew Baker(sample)

☒ Andrew Wayne

4 Andrew Zachary Barber

5 Bruce Clayton

6 Caleb Jones

Cancel
Select

5. To decide the order of signing, you can use the "Signing Order" field which allows you to specify the order in which the signatories should sign the document(s). The lower the number, the higher the priority for signing.

For example, if there are two signatories and you want the first signatory to sign first, you can assign the value "1" to the first signatory and "2" to the second signatory. This way, the first signatory will receive the document(s) first for signing. You can change the signing order by updating the values in the "Signing Order" field for each signatory.

6. If "Fix sign position" is checked then Signatory should place their signature only at the bottom of the page. If "Sign all pages" field is not checked then signatory can place their signature only at the bottom of last page.

Email information

Subject \* Please sign the documents

Fix sign position ☒

Sign every page ☐

7. If "Sign every page" field is checked then signatory should sign all pages at the bottom of each page.

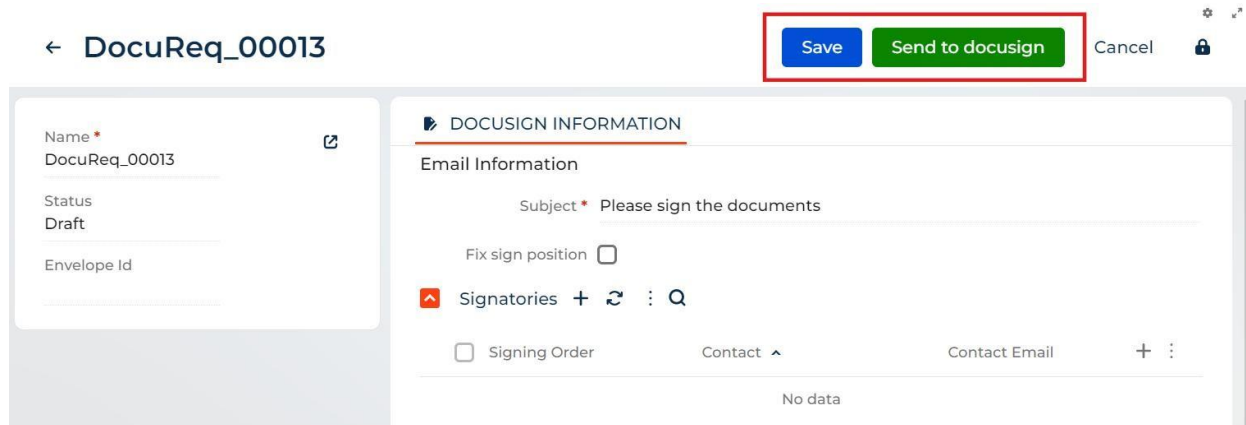
Email information

Subject \* Please sign the documents

Fix sign position ☒

Sign every page ☒

8. After filling all the details user can either click on “Save” button which saves the record or click on “Send to docuSign” button which saves the record and sends mails to the signatories based on the signing order. If Save button is clicked, to send the document to docuSign click on “Send to docuSign”.



← DocuReq\_00013

**Save** **Send to docuSign** Cancel

**DOCUSIGN INFORMATION**

Email Information

Subject \* Please sign the documents

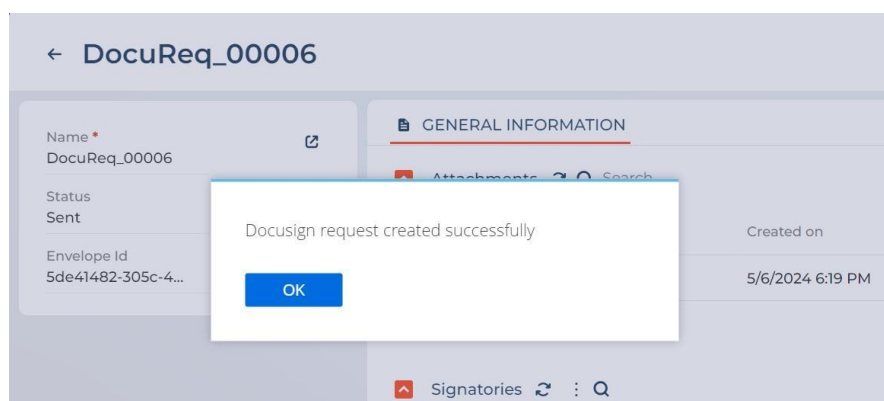
Fix sign position ☐

**Signatories** + ↺ 🔍

☐ Signing Order Contact ^ Contact Email + ⋮

No data

9. User can check the details of the Request on DocuSign Requests section page. Upon clicking "Send for DocuSign," a popup will appear once the request has been created.



← DocuReq\_00006

**GENERAL INFORMATION**

Attachments 🔍

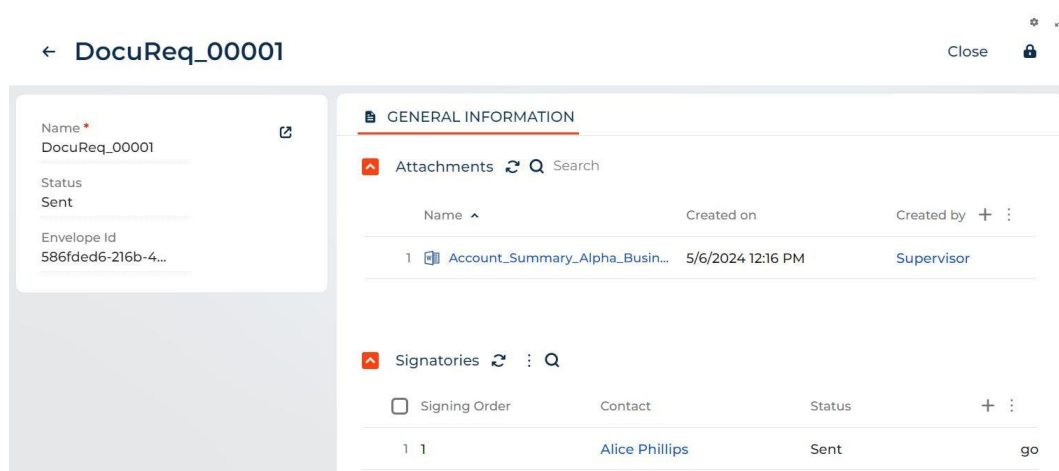
DocuSign request created successfully

OK

Created on 5/6/2024 6:19 PM

**Signatories** ↺ 🔍

10. Users can see the request Status, Envelope Id, Document sent and Connected record URL in the request page.



← DocuReq\_00001

**GENERAL INFORMATION**

**Attachments** 🔍

Name ^	Created on	Created by + ⋮
1 Account_Summary_Alpha_Busin...	5/6/2024 12:16 PM	Supervisor

**Signatories** ↺ 🔍

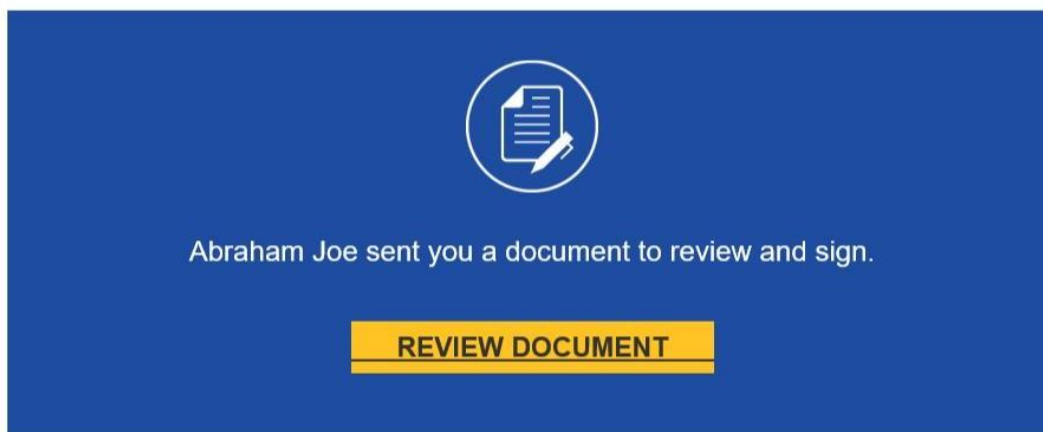
☐ Signing Order Contact Status + ⋮

1	1	Alice Phillips	Sent	go
---	---	----------------	------	----

11. If a User clicks on the button next to the Name field, Creatio will open the record page from where the request is sent. Users can check individual status of each signatory in “Signatories” tab.

12. Signatories will receive email as shown below

**DocuSign**



13. They should click on “Review Document” button and complete the signing process, click “Finish”.

14. If any signatory declines to sign, the request status will be marked as “Declined.”

15. In this case, the specific signatory’s status will show as “Declined,” while all subsequent signatories in the signing order will have their statuses updated to “Cancelled due to decline.” These remaining signatories will not receive email notifications.

16. After everyone finishes the signing process status of the request will be “Completed” and the signed document will be attached to the docusign record and will also be available in the attachment section of the record page from where the request was sent.

← **DocuReq\_00077**

Name \*  
DocuReq\_00077

Status  
Sent

Envelope Id  
f9d6adb1-6320-4493-80b7-34b4...

**GENERAL INFORMATION**

**Attachments** 🔍 Search

	Name ^	Created on	Created by
1	Certification new assignment_Si...	9/4/2025 3:35 PM	Supervisor
2	Certification new assignment.pdf	9/4/2025 3:32 PM	Supervisor

**Signatories** 🔍

<input type="checkbox"/>	Signing Order	Contact	Status
1	1	Alice Phillips	Completed
2	2	Andrew Baker(sample)	Completed

## ← Axiom

♥ Add tag

Close

Feed Attachments

Next best offers < >

Software **marketing** 96%

Ready-to-use platform to automate marketing campaigns and lead management workflows with no...

ACCOUNT INFO TIMELINE SALES SERVICE

Also known as  
Axiom

Business entity  
Co.

Annual revenue  
11 - 15 million

No. of employees  
51-100

Addresses +

Address type	Full address
1 <span>Actual</span>	10635, United States, New York, New York, ...

Banking details +

Attachments

Certification n...  
9/4/2025 2:...

Certification n...  
Certification new assignment\_Signed.pdf

## ← DocuReq\_00075

Name \*  
DocuReq\_00075

Status  
Declined

Envelope Id  
dd51a33a-8cb4-4152-8129-5be53...

GENERAL INFORMATION

Attachments Search

	Name ^	Created on	Created by
1	Certification new assignment.pdf	9/4/2025 3:18 PM	Supervisor

Signatories

<input type="checkbox"/>	Signing Order	Contact	Status
1	1	Andrew Wayne	Completed
2	1	Andrew Baker(sample)	Declined

## ← DocuReq\_00074

Name \*  
DocuReq\_00074

Status  
Declined

Envelope Id  
83930c25-2a0e-4b03-b304-8e2...

GENERAL INFORMATION

Attachments Search

	Name ^	Created on	Created by
1	Certification new assignment.pdf	9/4/2025 3:11 PM	Supervisor

Signatories

<input type="checkbox"/>	Signing Order	Contact	Status ^
1	3	Andrew Baker(sample)	Cancelled due to decline
2	1	Bruce Clayton	Completed
3	2	Alice Phillips	Declined