

Psiog DocuSign Integration for Creatio Documentation

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1. Document Info

Software Release:	V2.0
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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.

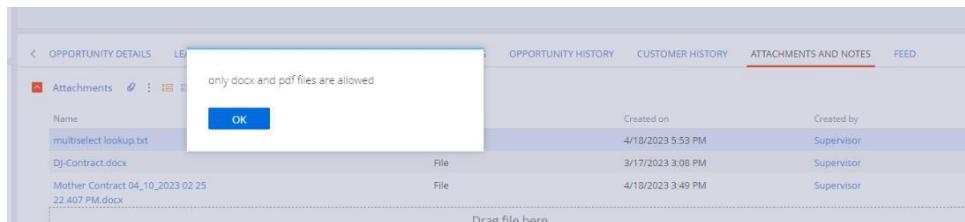
Note: Users can find this in “DocuSign Requests” section page.

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: 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.



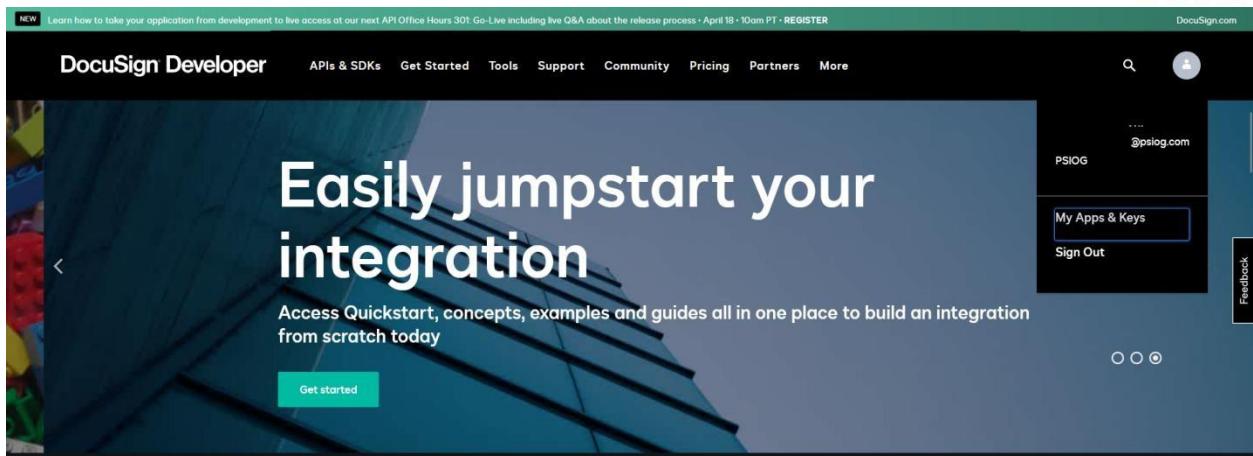
The DocuSign integration is designed to exclusively support PDF and DOCX file formats for sending documents to signatories. If you attempt to send any other file format, you will receive an error message indicating that “only PDF and DOCX files are allowed”.

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 *

Integration Key

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

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)

Delete

+ GENERATE RSA

+ UPLOAD RSA

RSA Keypair

KZ+vguM+7MhJfisdl5y1UPjfkilDpSmS+nhX5TeLUsx5wtEL72hN5b8/AI04cqAp
Q99ABZ/igJN1mSm2KSIJx74kAKEK9+AX0jqKQ3ySVvyas4u6ER2en1zFMK31Gdt
QD/Qu5vSKJmEUot082FScSD5FG5TYL9g/dgYDFHwjN/DK1rV4IycSw7Vwyd0+j0
RQIDAQAB
-----END PUBLIC KEY-----

Private Key

-----BEGIN RSA PRIVATE KEY-----
MIIEpAIBAAKCAQEAn/U0TfQeszlt2nfBpis+EPqUZYfg/z+jUB+k+RdIvnzoK9/q
Jre9koH6Y7WvPw65GI+NkVjddXo2sQnVVyRRt4yeZ+Jq9FquIMSknC4QhiTMYL0e
Z+wRDjqvD3ESeRdWzEb5mrhakqajTh8ozvR8KZ+vguM+7MhJfisdl5y1UPjfkilD
pSmS+nhX5TeLUsx5wtEL72hN5b8/AI04cqApQ99ABZ/igJN1mSm2KSIJx74kAKE
K9+AX0jqKQ3ySVvyas4u6ER2en1zFMK31GdtQD/Qu5vSKJmEUot082FScSD5FG5T
YL9g/dgYDFHwjN/DK1rV4IycSw7Vwyd0+j0RQIDAQABoIBABm1Wz76Wme61/GU
jNBDE57uRhenOvxBrEH+6Nj1Ek00QpcyPdz6TaMtQsN00EWoayXUckqw+ETLFPS6
kmNU/ZMTsRwP0b0ewtdPH+NIgW64fKov+C2KTEu/Pe0YYHFYvBphcMinNMTxdCkbO
uSDBUxzrVN0D6UVWcW4QpJx3yYubMm3z6dsnP3Q9S01XySmu7RZPYSWZuuFgqwAq
xTL4ZgGazobLpMhwew1uvAY7MWJRgWdgGGfY4IvjQNq5kEqEF2qNC/GMN7QriE3
WE90E4LLv7z4I3LKONfltm0qUT/mYjr3TqAvfVsw+nk1kDQj7T2JInG4rOrgEtKQ

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

Additional settings

Redirect URIs

<https://mycreatio.com>

[+ ADD URI](#)

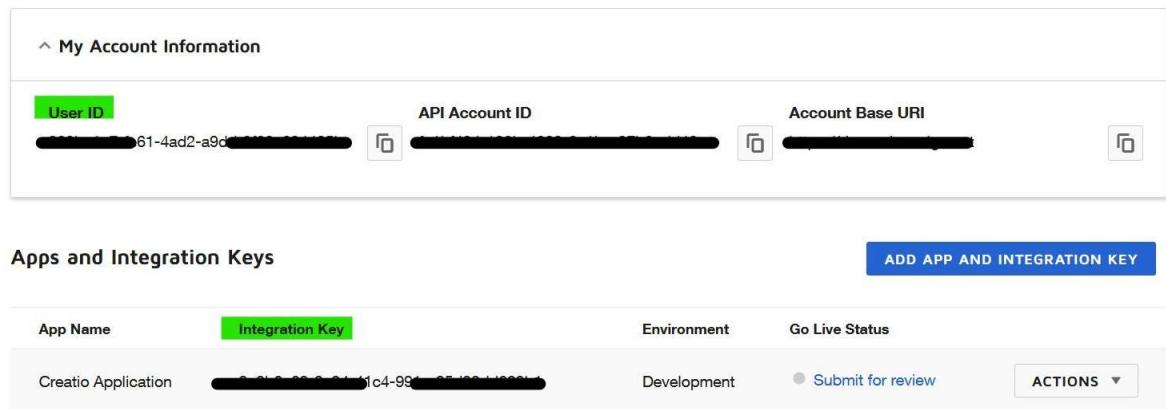
Link to Privacy Policy

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

Link to Terms of Use

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

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



The screenshot shows the DocuSign developer console. At the top, there's a section for 'My Account Information' with fields for 'User ID' (redacted), 'API Account ID' (redacted), and 'Account Base URI' (redacted). Below this is a table titled 'Apps and Integration Keys' with columns for 'App Name', 'Integration Key' (highlighted in green), 'Environment', and 'Go Live Status'. A single row is shown for 'Creatio Application' with an integration key of '3a1c3233-3111-4c91-97f0-13021...', environment 'Development', and status 'Submit for review'. A blue 'ADD APP AND INTEGRATION KEY' button is at the top right of the table.

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)

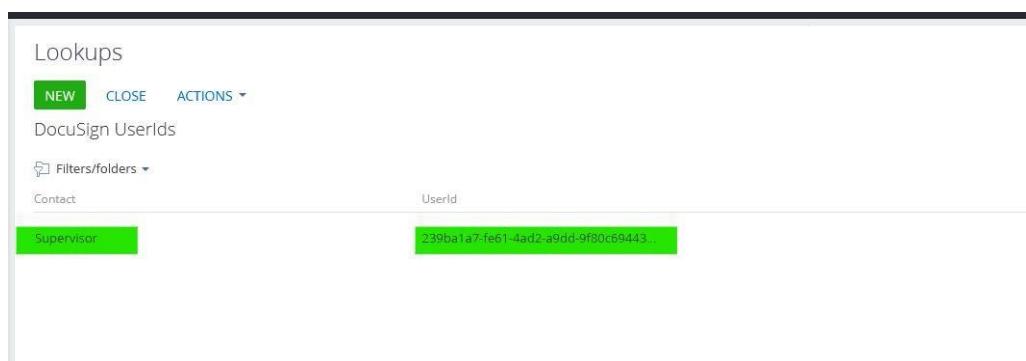
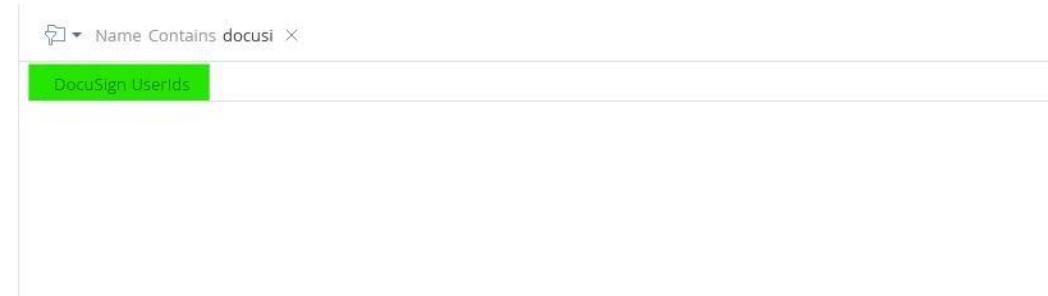
Once DocuSign Account is configured for Creatio, the steps below should be followed.

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)

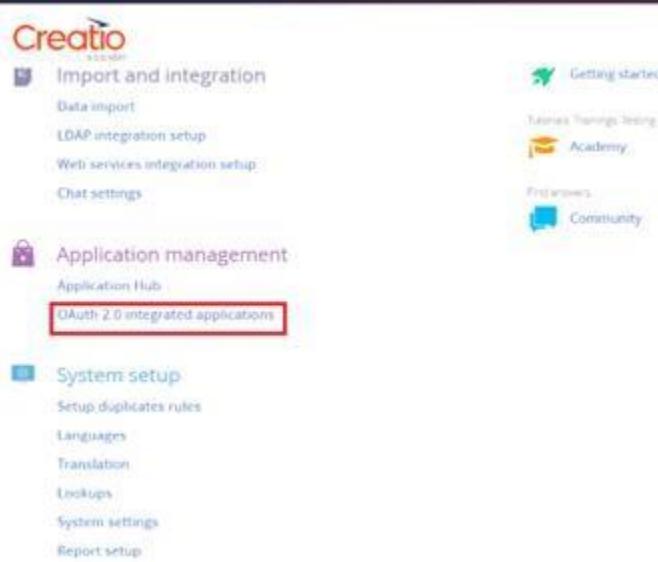
Name	Code
DocuSign Domain Url	PsgDSDomain
DocuSign has Single UserId	PsgDSIsSingleUserId
DocuSign Integration Key	PsgDSIntegrationKey
DocuSign Private Key	PsgDSPrivateKey
DocusignUserId	PsgDSUserId

[OPEN](#) [COPY](#) [DELETE](#)

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 “PsgDSIsSingleUserId” 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”.



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



11. Click on “New”

OAuth 2.0 integrated applications					
		ACTIONS			
		New			
Filter/Folders					
Name	Application URL	Group	Created on	Updated on	Active
Webhook Account Service Identity	https://webhooks.creatio.com		5/13/2023 1:30 PM	5/13/2023 1:30 PM	Yes
Studio Creative	https://studio.creatio.com		5/13/2023 1:30 PM	5/13/2023 1:30 PM	Yes

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

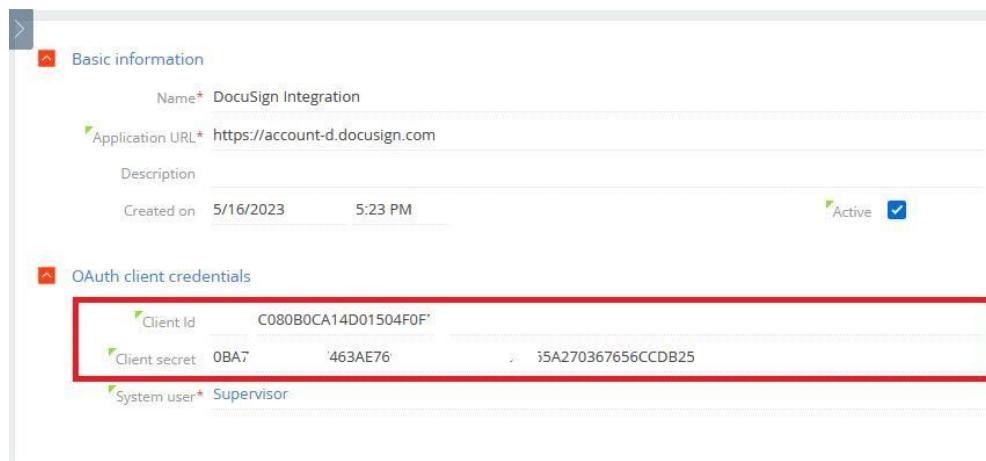
Client Id

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

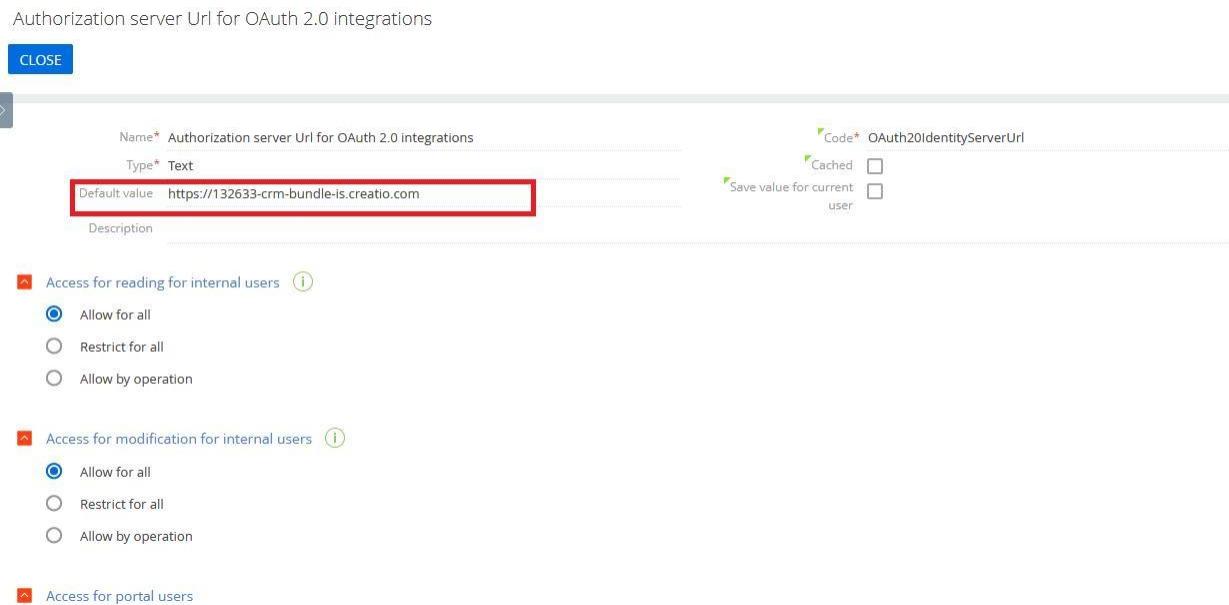
Created on 5/16/2023 5:23 PM

Active

OAuth client credentials

Client Id	C080B0CA14D01504F0F'
Client secret	0BA7463AE7635A270367656CCDB25
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>

Code* OAuth20IdentityServerUrl

Cached

Save value for current user

Description

Access for reading for internal users (i)

Allow for all

Restrict for all

Allow by operation

Access for modification for internal users (i)

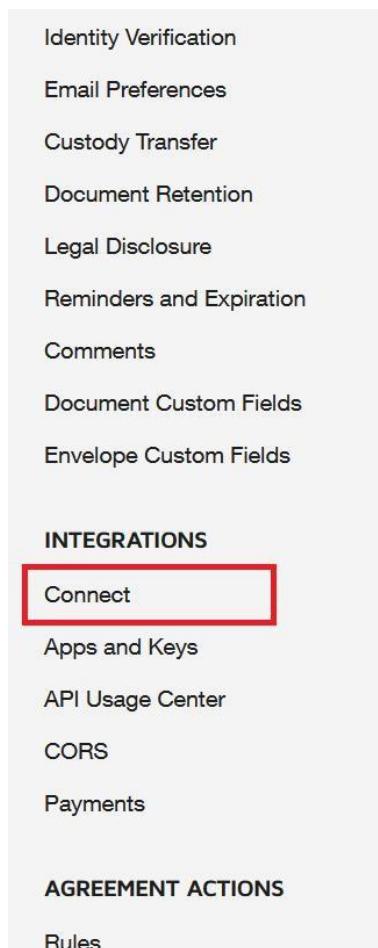
Allow for all

Restrict for all

Allow by operation

Access for portal users

15. Open DocuSign and open “**My Apps & 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 DocuSign to 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

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

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 *	at.io.com/0/rest/PsgDocuSignService/EnvelopeCompleted
HTTPS required	
<input checked="" type="checkbox"/> Enable Log (maximum 100) <input checked="" type="checkbox"/> 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:	Recipient Events:
<input type="checkbox"/> Envelope Sent	<input type="checkbox"/> Recipient Sent
<input type="checkbox"/> Envelope Delivered	<input type="checkbox"/> Recipient Auto Responded
<input checked="" type="checkbox"/> Envelope Signed/Completed	<input type="checkbox"/> Recipient Delivered
<input type="checkbox"/> Envelope Declined	<input checked="" type="checkbox"/> Recipient Signed/Completed
<input type="checkbox"/> Envelope Voided	<input checked="" type="checkbox"/> Recipient Declined
<input type="checkbox"/> Envelope Resent	<input type="checkbox"/> Recipient Authentication Failure
<input type="checkbox"/> Envelope Corrected	<input type="checkbox"/> Recipient Resent
<input type="checkbox"/> Envelope Purge	<input type="checkbox"/> Recipient Delegate
<input type="checkbox"/> Envelope Deleted	<input type="checkbox"/> Recipient Reassign
<input type="checkbox"/> Envelope Discard	<input type="checkbox"/> Recipient Finish Later
<input type="checkbox"/> Envelope Created	
<input type="checkbox"/> Envelope Removed	

JSON Payload Sample (trimmed)

Custom Fields

Documents

Attachments

Extensions

Folders

Recipients

Powerform

Tabs

Payment Tabs

Prefill Tabs

```
{
  "event": "recipient-sent",
  "uri": "/restapi/{apiVersion}/accounts/{accountId}/envelopes/{envelopeId}",
  "retryCount": "0",
  "configurationId": "xxxxxx",
  "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@docsign.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"> 1. Domain URL of the DocuSign account 2. Example: https://account.docusign.com (developers) 3. Example: https://account.docusign.com (Normal Users)
2	DocuSign has Single UserId	PsgDSIsSingleUserId	<ol style="list-style-type: none"> 1. Change the value to true if entire Creatio instance has only one user id
3	DocusignUserId	PsgDSUserId	<ol style="list-style-type: none"> 1. If entire Creatio instance has only one user id then fill this value with the DocuSign UserId.
4	DocuSign Integration Key	PsgDSIntegrationKey	Integration key from DocuSign Website
5	DocuSign Private Key	PsgDSPrivateKey	Private key from DocuSign Website

l owing lookup needs to be configured.

1. Enable Send To DocuSign Button.

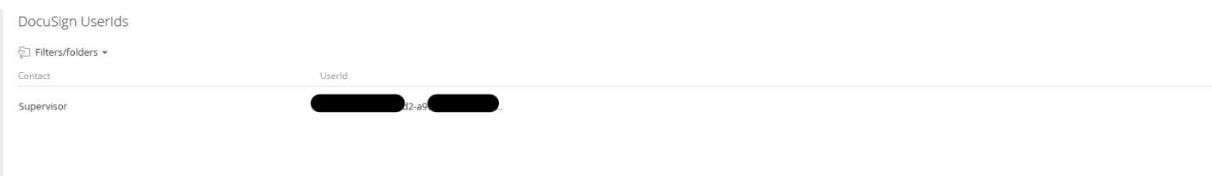
Name of lookup: DocuSign UserIds

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:

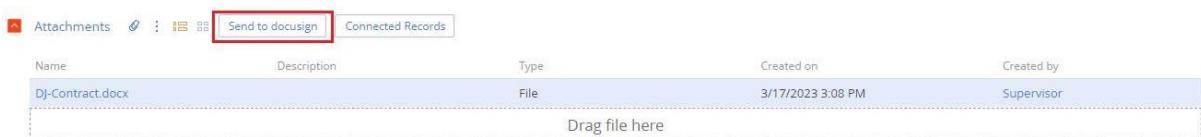


Note: Ensure that each contact is only mapped to one user ID. This helps prevent any confusion or errors that may arise from multiple contacts being assigned to the same user ID or vice versa.

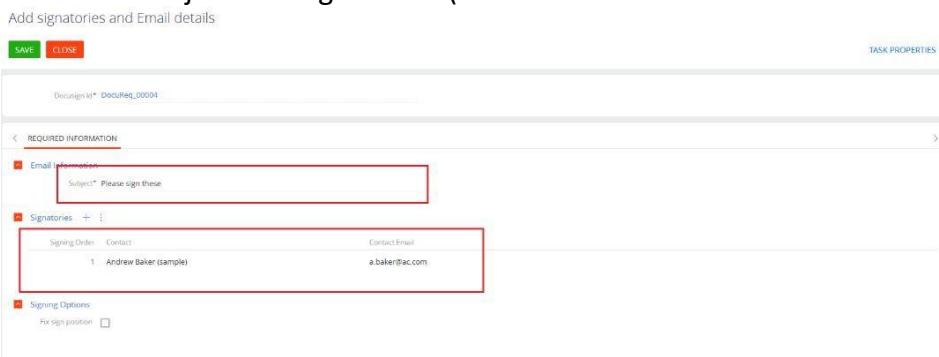
9. Walk-through

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”



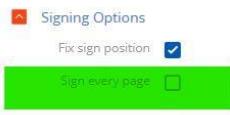
3. Add Email Subject and Signatories (To whom user wants to send documents for signing)



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.



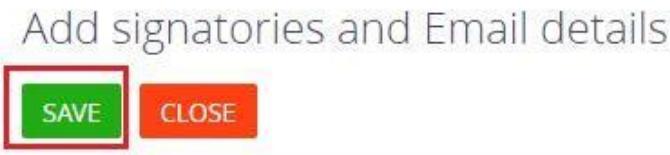
6. If “Fix sign position” is checked then Signatory should place their signature only at the bottom of the page. If “Sign all pages” field is not checked then signatory can place their signature only at the bottom of last page.



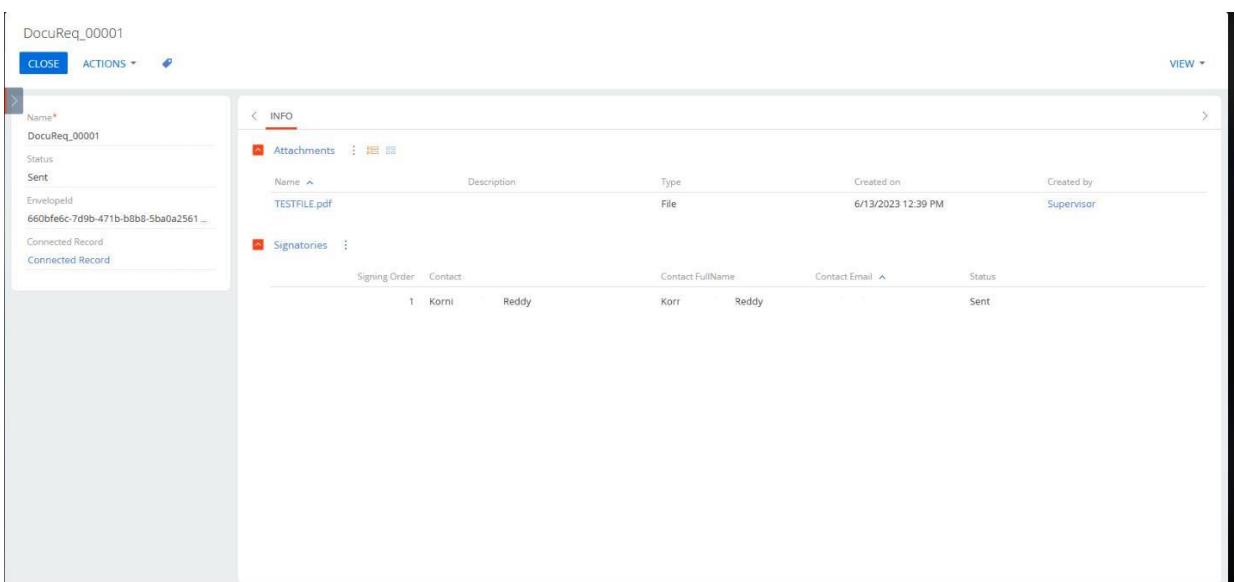
7. If “Sign every page” field is checked then signatory should sign all pages at the bottom of each page.



8. After filling all the details click “save”



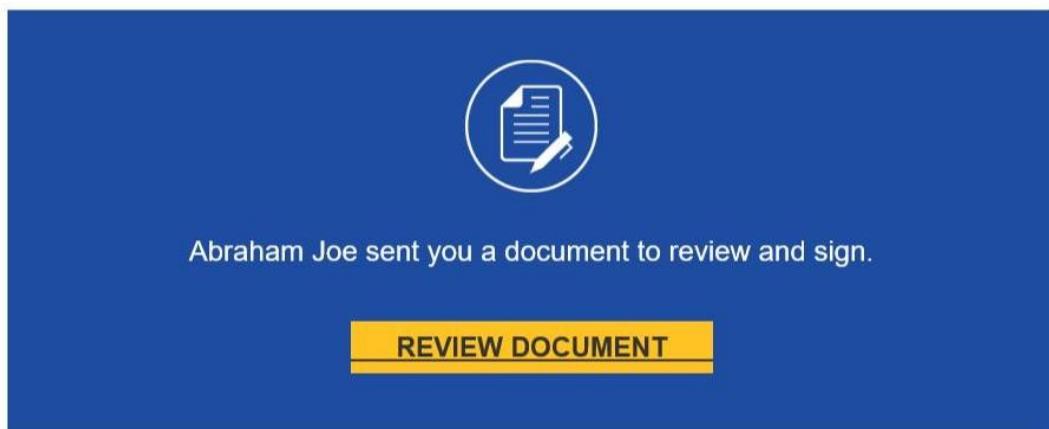
9. After clicking save, mail will be sent to signatories according to their signing order by email. User can check the details of the Request on DocuSign Requests section page.



Name	Status	Signatories								
DocuReq_00001	Sent	<table border="1"> <thead> <tr> <th>Signatory Order</th> <th>Contact</th> <th>Contact Email</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Korni Reddy</td> <td>Korr Reddy</td> <td>Sent</td> </tr> </tbody> </table>	Signatory Order	Contact	Contact Email	Status	1	Korni Reddy	Korr Reddy	Sent
Signatory Order	Contact	Contact Email	Status							
1	Korni Reddy	Korr Reddy	Sent							

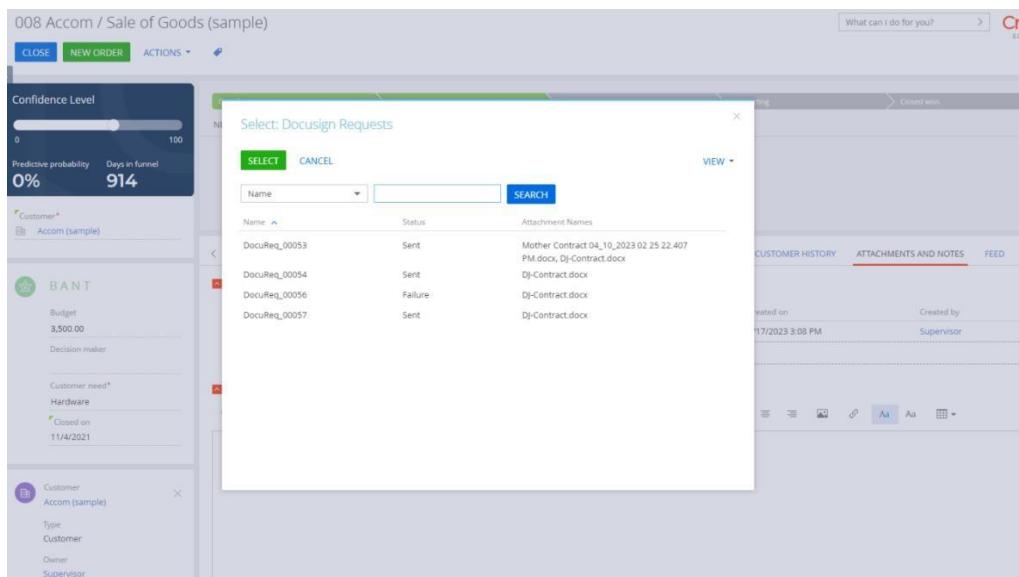
10. Users can check the Status of the DocuSign Request status, DocuSign Envelope Id.
11. If a User clicks on Connected Record, creatio will open the record page from where the request is sent.
12. Users can check individual status of each signatory in “Signatories” tab.
13. Signatory will receive mail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

Attachments	Send to docusign	Connected Records		
Name	Description	Type	Created on	Created by
DJ-Contract.docx		File	3/17/2023 3:08 PM	Supervisor
Drag file here				



Name	Status	Attachment Names
DocuReq_00053	Sent	Mother Contract 04_10_2023 02 25 22.407 PM.docx, Dj-Contract.docx
DocuReq_00054	Sent	Dj-Contract.docx
DocuReq_00056	Failure	Dj-Contract.docx
DocuReq_00057	Sent	Dj-Contract.docx

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.

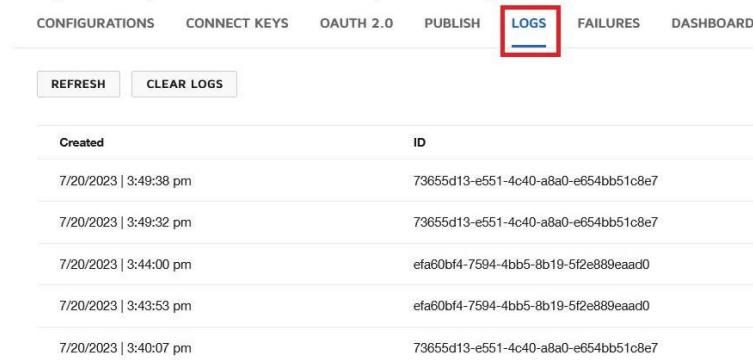


Note: If any error occurs while receiving signed documents back to creatio from the docusign, you can check the logs in docusign website.

Goto: Settings >> Connect >> Logs

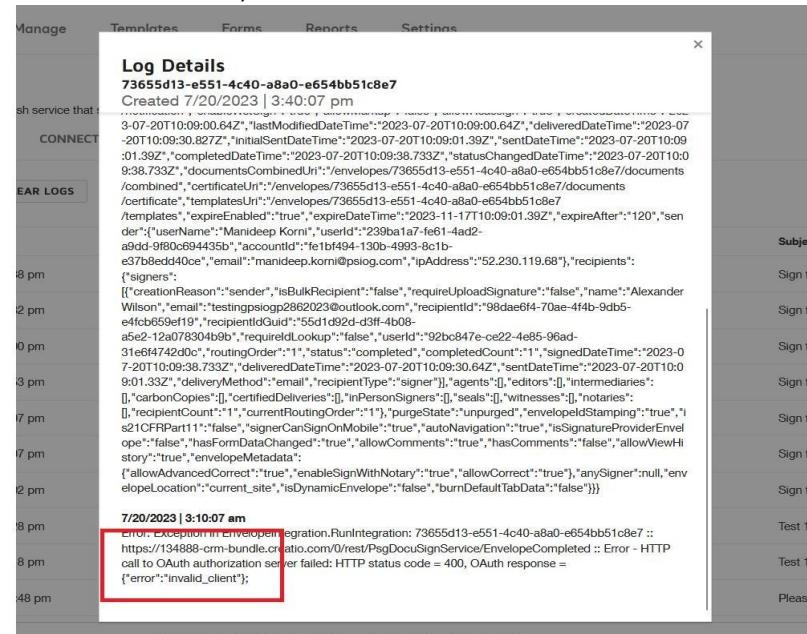
Connect

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



Created	ID	Subject
7/20/2023 3:49:38 pm	73655d13-e551-4c40-a8a0-e654bb51c8e7	Sign this test document
7/20/2023 3:49:32 pm	73655d13-e551-4c40-a8a0-e654bb51c8e7	Sign this test document
7/20/2023 3:44:00 pm	efa60bf4-7594-4bb5-8b19-5f2e889eaad0	Sign this
7/20/2023 3:43:53 pm	efa60bf4-7594-4bb5-8b19-5f2e889eaad0	Sign this
7/20/2023 3:40:07 pm	73655d13-e551-4c40-a8a0-e654bb51c8e7	Sign this test document

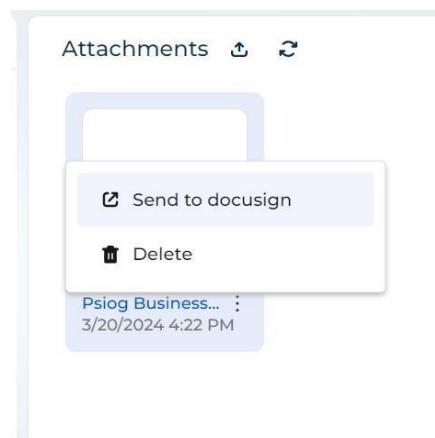
You can check the error in Log details. If you find this type of error: “invalid_client”, check the client id, client secret in oauth tab.



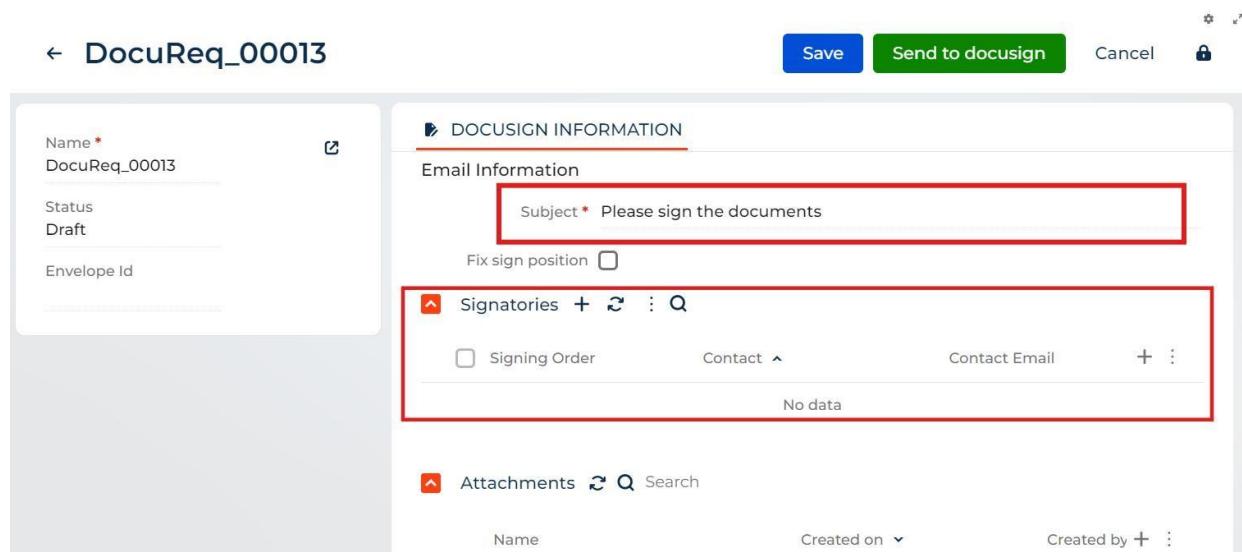
9.2 Walk-through - Freedom UI

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”.



← 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

Attachments Search

Name Created on 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 X

Search

Full name + :

<input checked="" type="checkbox"/> Alice Phillips
<input checked="" type="checkbox"/> Andrew Baker(sample)
: <input checked="" type="checkbox"/> 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.

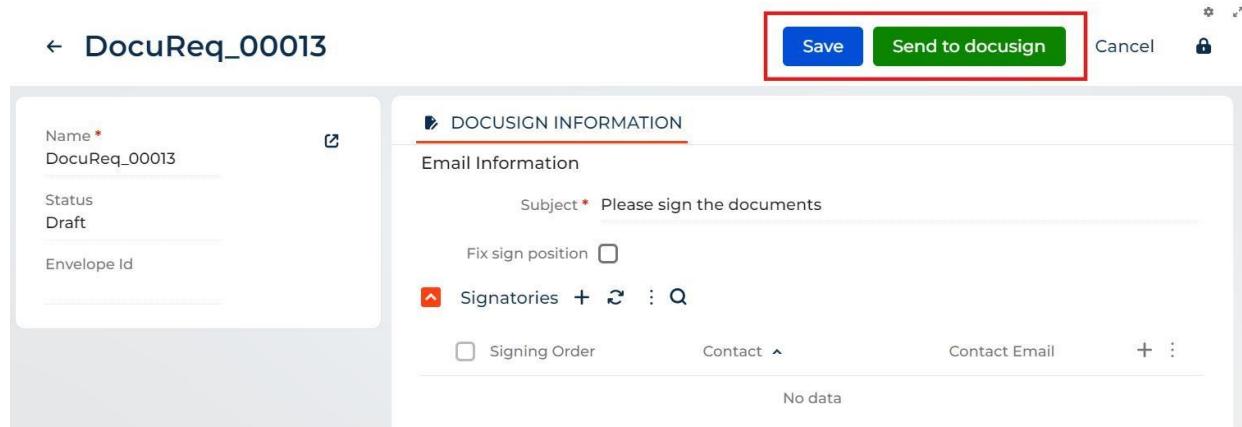
Email information

Subject * Please sign the documents

Fix sign position

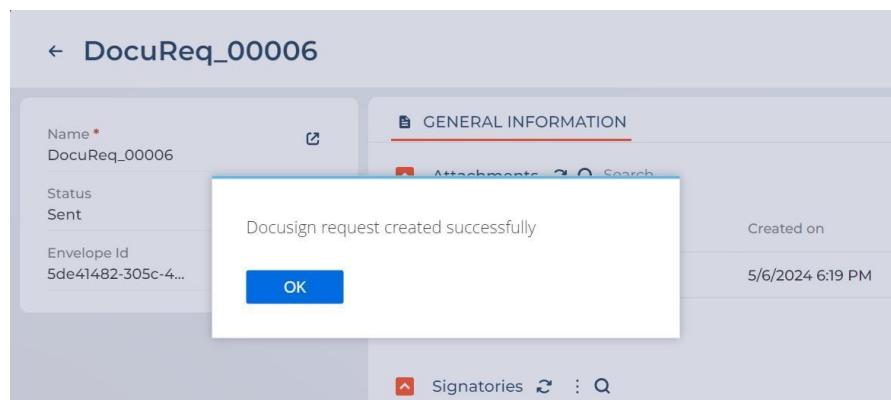
Sign every page

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”.



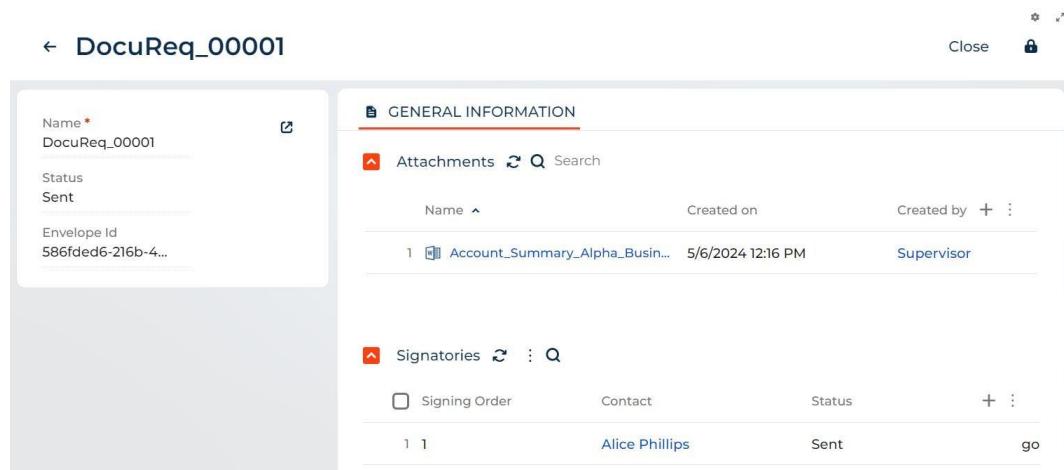
The screenshot shows the 'DocuReq_00013' edit screen. On the right, there are three buttons: 'Save' (blue), 'Send to docusign' (green, highlighted with a red box), and 'Cancel'. The 'Send to docusign' button is intended to be clicked after saving the record to trigger the document sending process.

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.



The screenshot shows the 'DocuReq_00006' edit screen. A modal dialog box is displayed in the center, showing the message 'DocuSign request created successfully' with an 'OK' button. The background screen shows general information for the request, including the status 'Sent' and envelope ID '5de41482-305c-4...'. The 'GENERAL INFORMATION' section is visible at the top of the background screen.

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

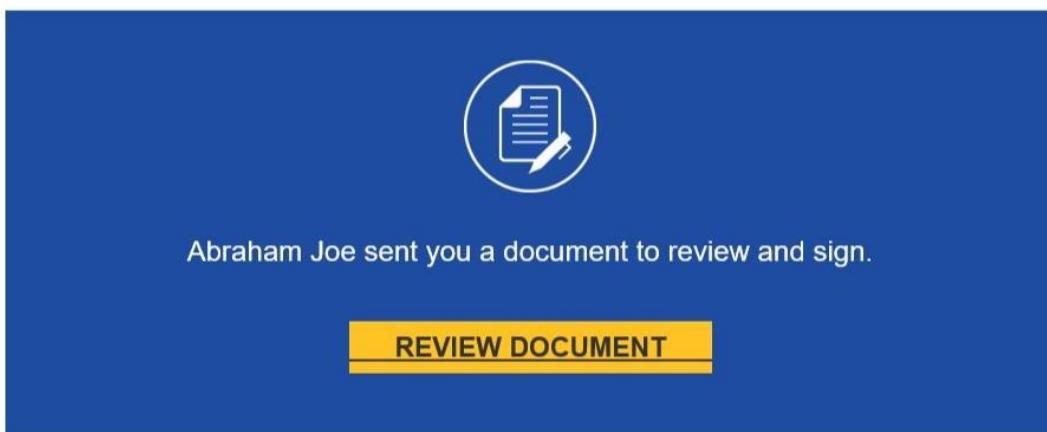


The screenshot shows the 'DocuReq_00001' request page. The left sidebar displays basic request details: Name 'DocuReq_00001', Status 'Sent', and Envelope Id '586fded6-216b-4...'. The main content area shows the 'GENERAL INFORMATION' section with an attachment table. The table lists one attachment: 'Account_Summary_Alpha_Busin...' (Created on 5/6/2024 12:16 PM, Created by Supervisor). Below this, the 'Signatories' section shows one signatory: 'Alice Phillips' (Status Sent). The 'Close' button is visible in the top right corner.

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  



Marketing

Software  marketing

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

ACCOUNT INFO  SALES SERVICE

Also known as Aksiom	Business entity Co.
Annual revenue 11 - 15 million	No. of employees 51-100

 Addresses    

Address type	Full address	  
1 Actual	10635, United States, New York, New York, 100-1000	

 Banking details    

Attachments    



 Certification n...

9/4/2025 2 Certification new assignment_Signed.pdf



 Certification n...

← 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