

Psiog Docusign Integration for Creatio Documentation

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1. Document Info

Software Release:	V1.0
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2. Revision History

S No	Date of Modification	Change Made
1	21 July 2023	Document V1

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 UI.

5. Build Information

S No	Particular	Details
1	Version	1.0.0
2	Creatio Version Compatibility	17.18 to 8.0.9
3	Creatio Product	Sales Product
4	Database	Postgres, SQL Server
5	Operating System	Windows 10/11
6	Platform	.NET Framework 4.7
7	Dependent Package	Product Core
8	Environments supported	Cloud

6. Features

1. User can send multiple documents at a time within a single request to DocuSign for e-signatures
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.

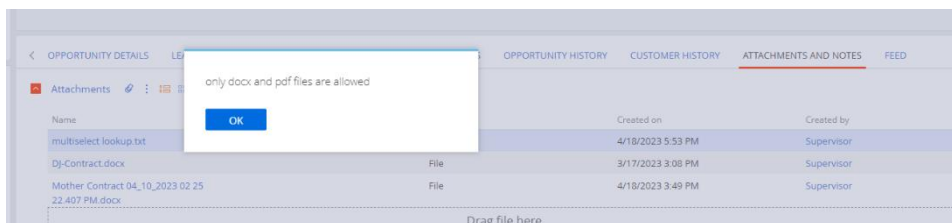
Note: Users can find this in “DocuSign Requests” section page.

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.



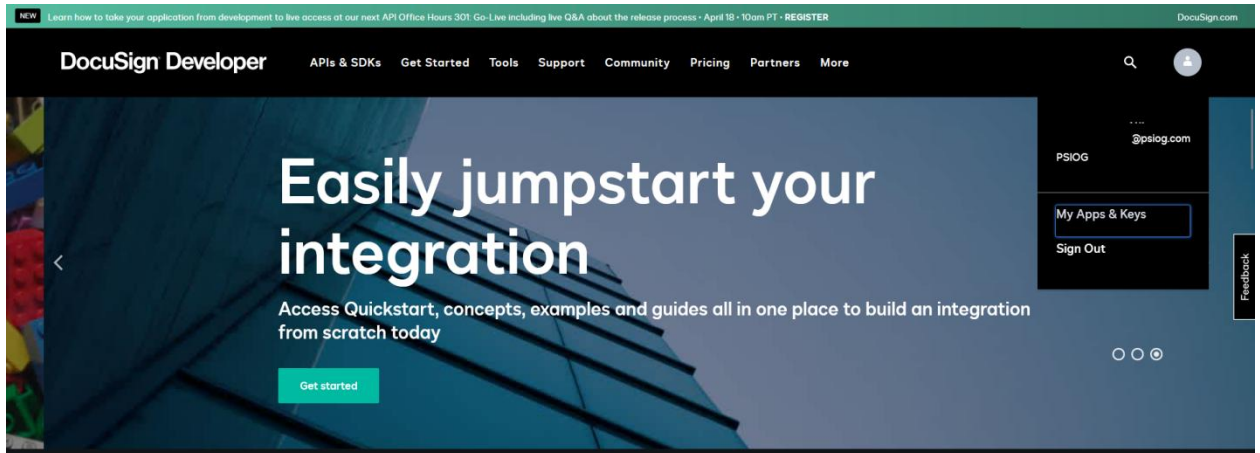
The DocuSign integration is designed to exclusively support PDF and DOCX file formats for sending documents to signatories. If you attempt to send any other file format, you will receive an error message indicating that “only PDF and DOCX files are allowed”.

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 *

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)

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

**+ GENERATE
RSA**

**+ UPLOAD
RSA**

RSA Keypair ✕

```

KZ+vguM+7MhJfisd15y1UPjfkILDpSmS+nhX5IeLUx5wtEL72hN5b8/AIO4cqAp
Q99ABZ/igJN1mSmi2KSIJx74kAkeK9+AX0jqKQ3ySVvyas4u6ER2en1zFMK31Gdt
QD/Qu5vSKJmEUot082FscSD5FG5TYL9g/dgYDFHwjN/DK1rV4IycSw7VvwydO+j0
RQIDAQAB
-----END PUBLIC KEY-----

```

Private Key

```

-----BEGIN RSA PRIVATE KEY-----
MIIEpAIBAAKCAQEA/U0TfQesz1t2nfBpis+EPqUZYfg/z+jUB+kRdIvnzoK9/q
Jre9koH6Y7WvPw65GI+NkVjddXo2sQnVYsRRt4yeZ+Jq9FquIMSknc4QhiTMYL0e
Z+wRDjqvD3ESerDwzEb5mrhakqajTh8ozvR8KZ+vguM+7MhJfisd15y1UPjfkILD
pSmS+nhX5IeLUx5wtEL72hN5b8/AIO4cqApQ99ABZ/igJN1mSmi2KSIJx74kAke
K9+AX0jqKQ3ySVvyas4u6ER2en1zFMK31GdtQD/Qu5vSKJmEUot082FscSD5FG5T
YL9g/dgYDFHwjN/DK1rV4IycSw7VvwydO+j0RQIDAQABoIBABm1Wz76Wme61/GU
jNBDE57uRhenOvxBrEH+6Nj1Ek00QpcyPdZ6TamtQsN00EwoayXUckqw+ETLFPS6
kmNU/ZMTsRwP0b0ewtdPH+NIglw64fKov+C2KTEu/Pe0YYHFYvBphcMiNMTxdCkb0
uSDBUxzrVN0D6UVWcW4QpJx3yYubMm3z6DsaP3Q9So1XySmu7RZPYSWZuuFgqwAq
xTL4ZgGazobLpMhWhew1uvAY7MWJRgWdgGGfY4IvJQNq5kEqEF2qNC/GMN7QriE3
WE90E4LLv7z4I3LkONf1tm0qUT/mYjr3TqAvfVsw+nk1kDQj7T2JInG4r0OrgEtKQ

```

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

Additional settings

Redirect URIs

✕

+
ADD URI

Link to Privacy Policy

Link to Terms of Use

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

^ My Account Information

<div style="border: 1px solid #ccc; padding: 2px;"> User ID </div>	<div style="border: 1px solid #ccc; padding: 2px;"> API Account ID </div>	<div style="border: 1px solid #ccc; padding: 2px;"> Account Base URI </div>
---	--	--

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	ACTIONS ▾

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.docusign.com

(Regular Account)- account-d.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](#).



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.

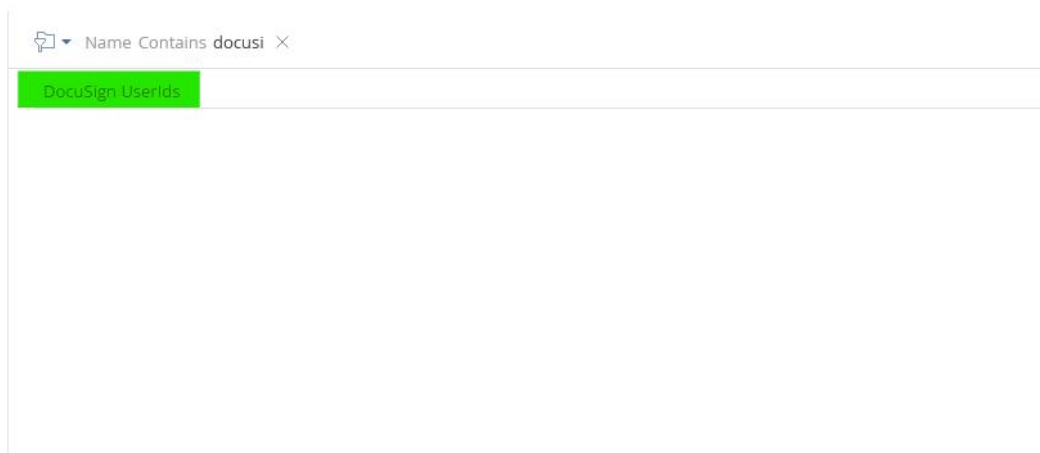
1. Login into Creatio instance

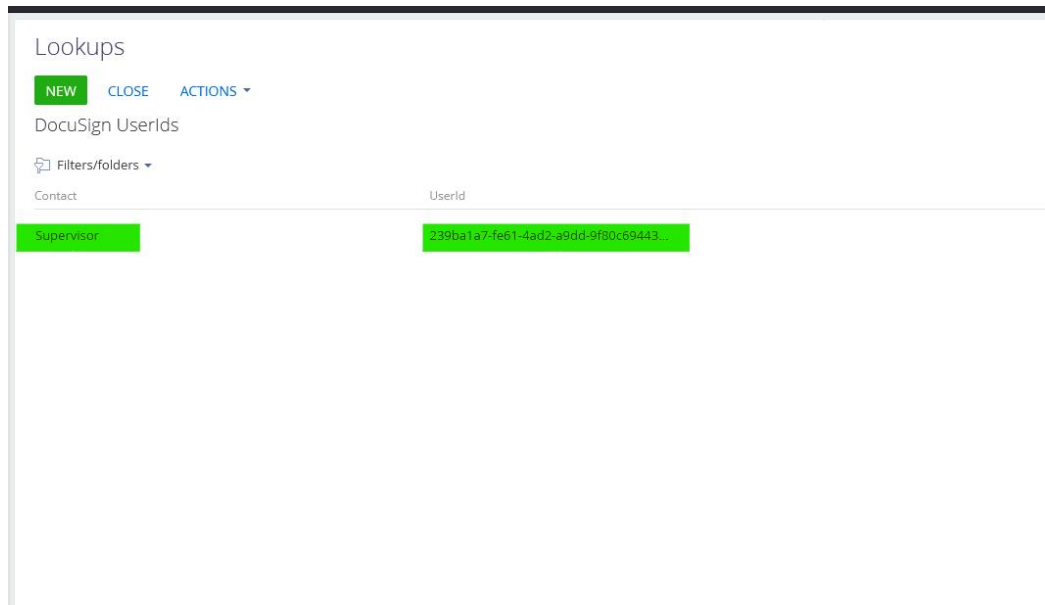
2. Open System Settings
3. Open “PsgDSDomain” system setting and enter DocuSign Url
<https://account.docusign.com> (Regular account)
<https://account-d.docusign.com> (Developer account)

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

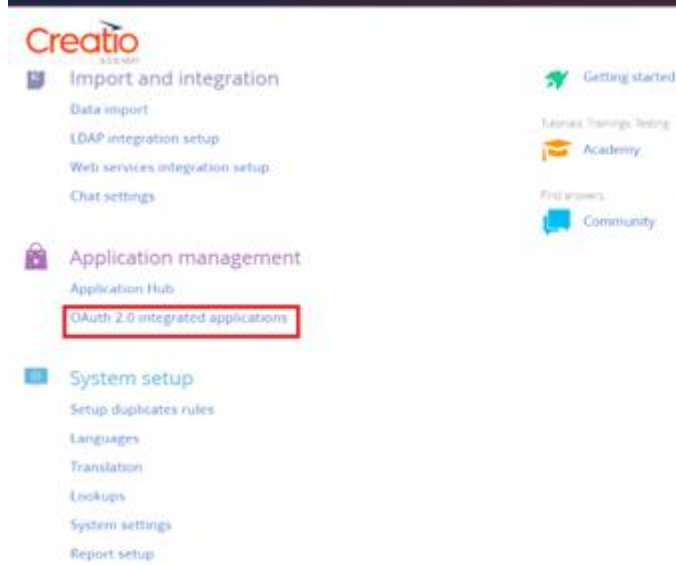
[OPEN](#)
[COPY](#)
[DELETE](#)

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**”



12. Fill the required values as follows
Name: **DocuSign Integration**,

Application URL: <URL entered in step3>
System User: <contact of system admin>

DocuSign Integration

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 OBA7 463AE76 5A270367656CCDB25

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 Code* OAuth20IdentityServerUrl

Type* Text

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

Save value for current user

Description

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.

- Identity Verification
- Email Preferences
- Custody Transfer
- Document Retention
- Legal Disclosure
- Reminders and Expiration
- Comments
- Document Custom Fields
- Envelope Custom Fields
- INTEGRATIONS**
- Connect**
- Apps and Keys
- API Usage Center
- CORS
- Payments
- AGREEMENT ACTIONS**
- Rules

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 *

Client Secret *

Authorization Server URL *

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

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

ADD CONFIGURATION ▾

- Custom
- Custom Recipient
- box 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**”, 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

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"> 1. Domain URL of the DocuSign account 2. Example: https://account-d.docusign.com (developers) 3. Example: https://account.docusign.com (Normal Users)
2	DocuSign has Single UserId	PsgDSIsSingle UserId	<ol style="list-style-type: none"> 1. Change the value to true if entire Creatio instance has only one user id
3	DocuSign UserId	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

Following lookup needs to be configured.

1. Enable Send To DocuSign Button.

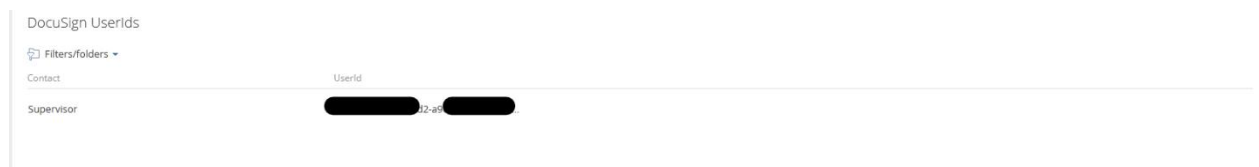
Name of lookup: DocuSign UserIds

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.

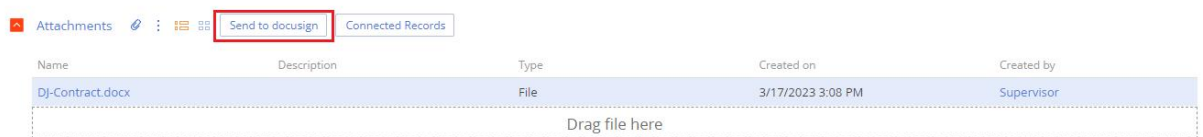
Example:



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.

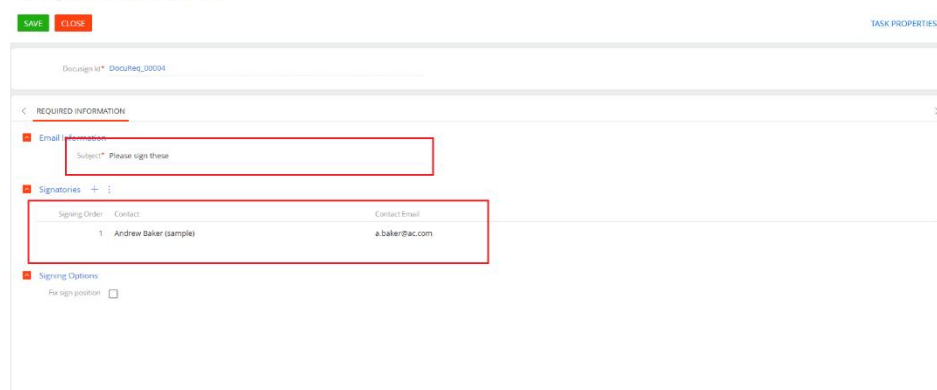
9. Walk-through

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"

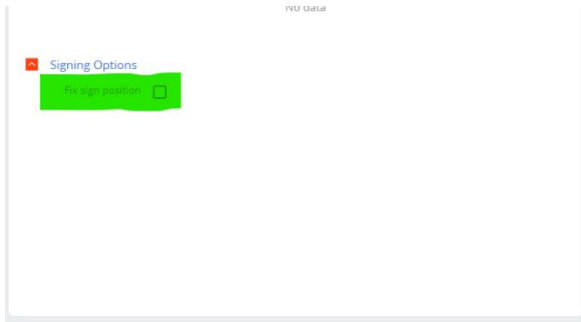


3. Add Email Subject and Signatories (To whom user wants to send documents for signing)

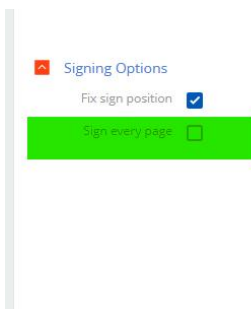
Add signatories and Email details



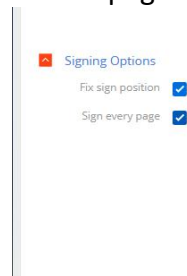
4. To decide the order of signing, you can use the "Signing Order" field which allows you to specify the order in which the signatories should sign the document(s). The lower the number, the higher the priority for signing.
For example, if there are two signatories and you want the first signatory to 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.



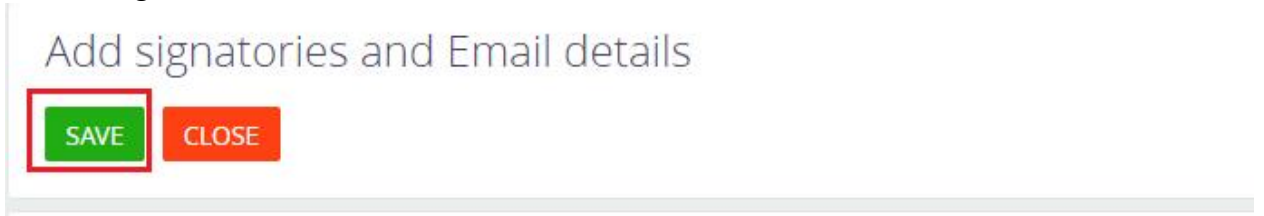
6. If “Fix sign position” is checked then Signatory should place their signature only at the bottom of the page. If “Sign all pages” field is not checked then signatory can place their signature only at the bottom of last page.



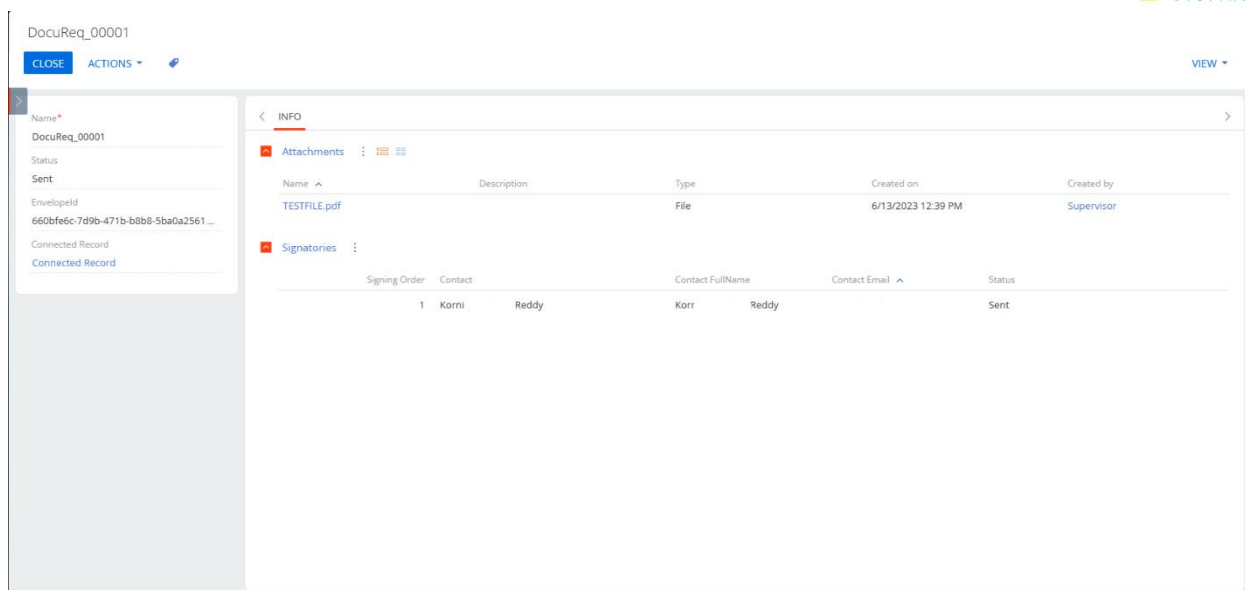
7. If “Sign every page” field is checked then signatory should sign all pages at the bottom of each page.



8. After filling all the details click “save”

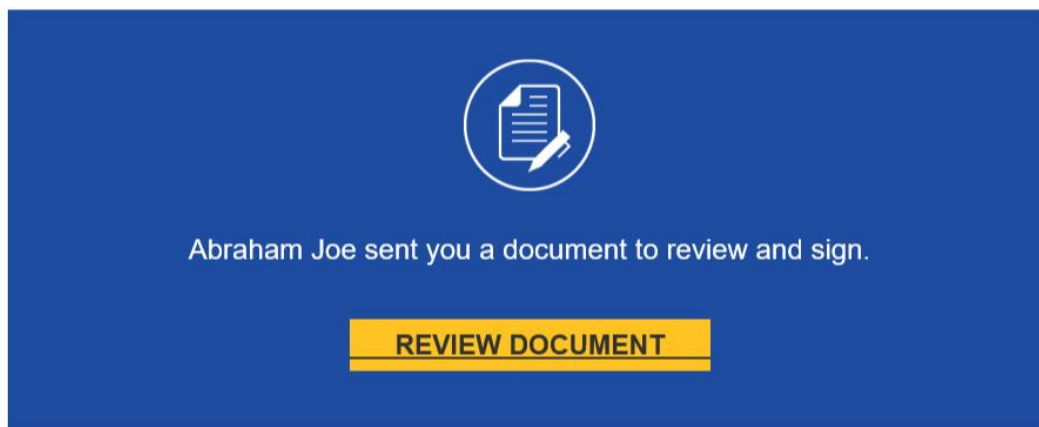


9. After clicking save, mail will be sent to signatories according to their signing order by email. User can check the details of the Request on DocuSign Requests section page.

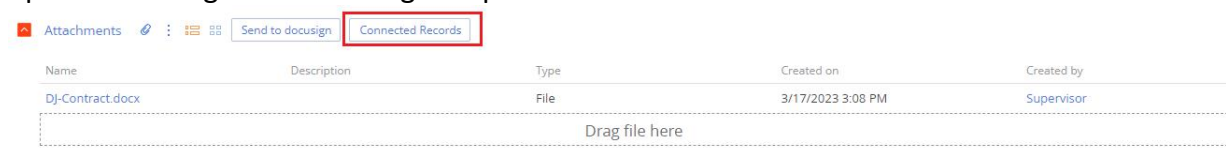


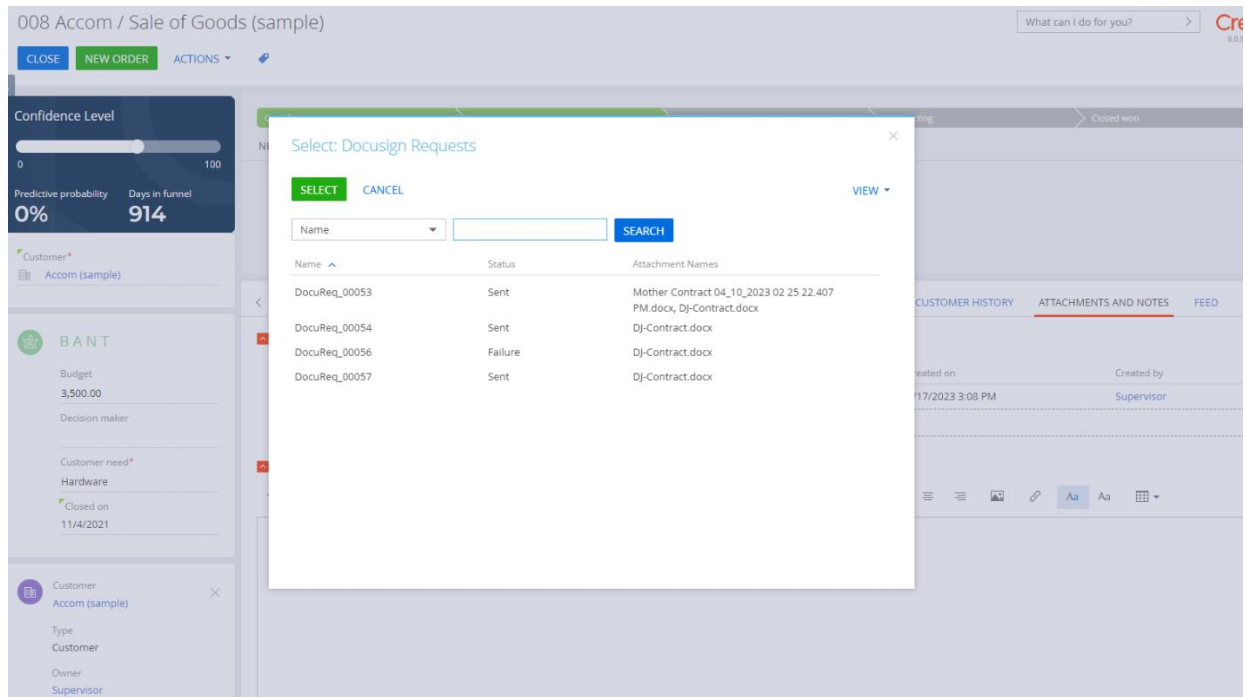
10. Users can check the Status of the DocuSign Request status, DocuSign Envelope Id.
11. If a User clicks on Connected Record, creatio will open the record page from where the request is sent.
12. Users can check individual status of each signatory in “Signatories” tab.
13. Signatory will receive mail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

DocuSign

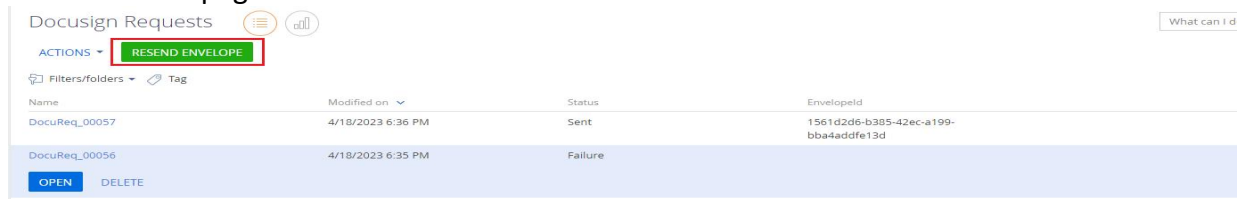


14. They should click on “Review Document” button and complete the signing process, click “Finish”.
15. After everyone finishes the signing process status of the request will be “Completed” and Signed document will be attached in the “Attachments” tab.
16. In the Attachment detail, if user clicks the 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

Connect

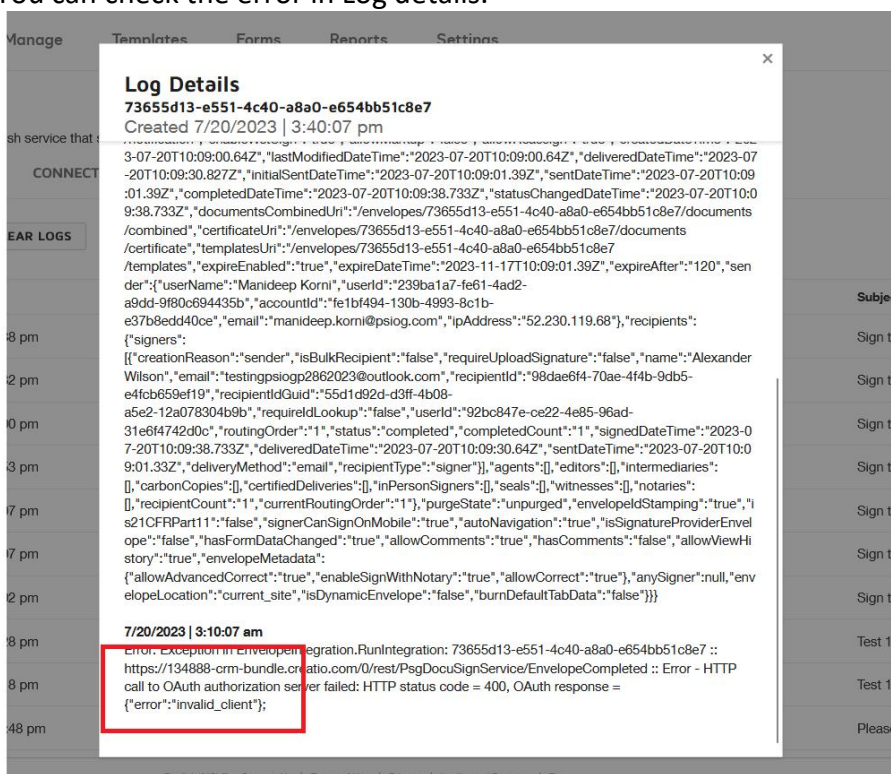
DocuSign Connect is a push service that sends real-time data updates to external applications.

CONFIGURATIONS CONNECT KEYS OAUTH 2.0 PUBLISH **LOGS** FAILURES DASHBOARD

REFRESH CLEAR LOGS

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.



Log Details
73655d13-e551-4c40-a8a0-e654bb51c8e7
 Created 7/20/2023 | 3:40:07 pm

```

{"creationReason": "sender", "isBulkRecipient": "false", "requireUploadSignature": "false", "name": "Alexander Wilson", "email": "testingspsio2862023@outlook.com", "recipientId": "98dae6f4-70ae-4f4b-9db5-e4fb659ef19", "recipientIdGuid": "55d1d92d-d3ff-4b08-a5e2-12a078304b9b", "requireLookup": "false", "userId": "92bc847e-ce22-4e85-96ad-31e6f4742d0c", "routingOrder": "1", "status": "completed", "completedCount": "1", "signedDateTime": "2023-07-20T10:09:38.733Z", "deliveredDateTime": "2023-07-20T10:09:30.64Z", "sentDateTime": "2023-07-20T10:09:01.33Z", "deliveryMethod": "email", "recipientType": "signer", "agents": [], "editors": [], "intermediaries": [], "carbonCopies": [], "certifiedDeliveries": [], "inPersonSigners": [], "seals": [], "witnesses": [], "notaries": [], "recipientCount": "1", "currentRoutingOrder": "1", "purgeState": "unpurged", "envelopeStamping": "true", "is21CFRPart11": "false", "signerCanSignOnMobile": "true", "autoNavigation": "true", "isSignatureProviderEnvelope": "false", "hasFormDataChanged": "true", "allowComments": "true", "hasComments": "false", "allowViewHistory": "true", "envelopeMetadata": {"allowAdvancedCorrect": "true", "enableSignWithNotary": "true", "allowCorrect": "true", "anySigner": null, "envelopeLocation": "current_site", "isDynamicEnvelope": "false", "burnDefaultTabData": "false"}}
  
```

7/20/2023 | 3:10:07 am

```

Error: Exception in EnvelopeIntegration.RunIntegration: 73655d13-e551-4c40-a8a0-e654bb51c8e7 :: https://134888-crm-bundle.oracle.com/O/rest/PsgDocuSignService/EnvelopeCompleted :: Error - HTTP call to OAuth authorization server failed: HTTP status code = 400, OAuth response = {"error": "invalid_client"}
  
```

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

