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.

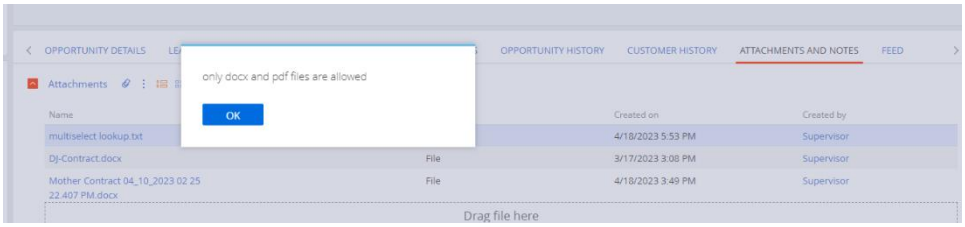
5. Build Information

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. 

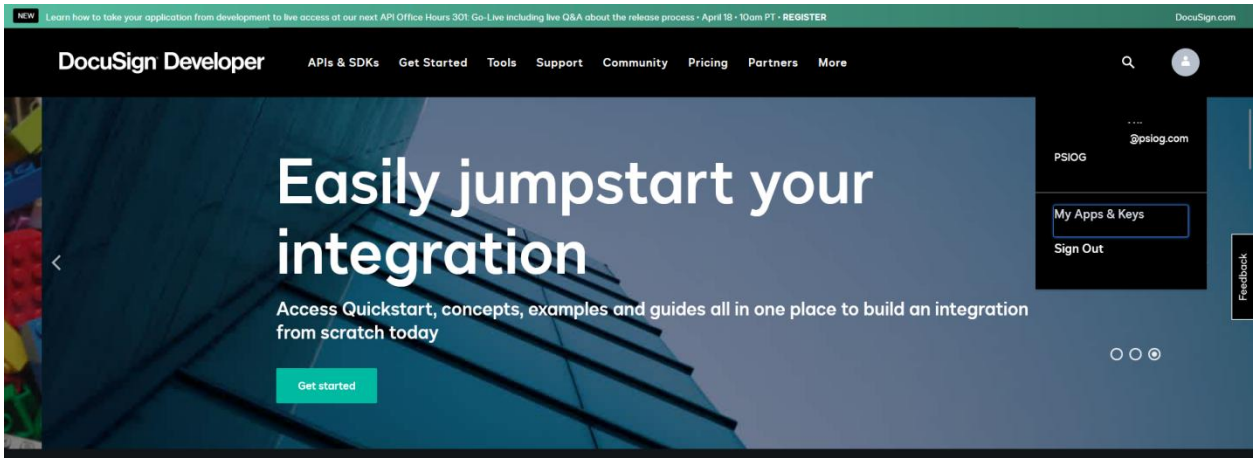
   The DocuSign integration is designed to exclusively support PDF and DOCX file formats for sending documents to signatories. If you attempt to send any other file format, you will receive an error message indicating that “only PDF and DOCX files are allowed”.

8. Configuration

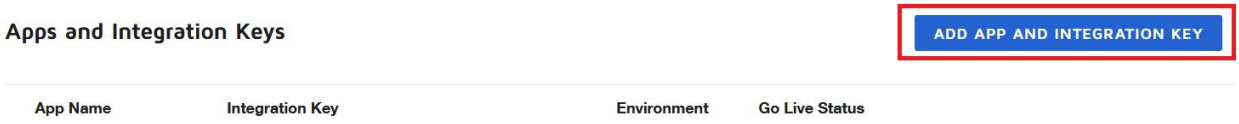
8.1 Configuring DocuSign Account for Creatio.

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

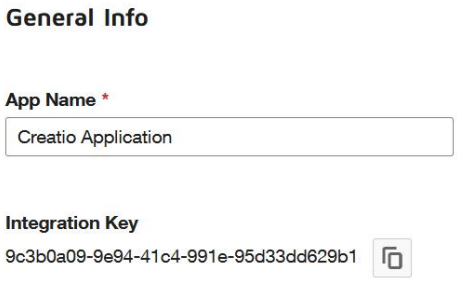
1. Create a DocuSign account if you don't already have one.
2. Log in to your DocuSign account.
3. Navigate to "My Apps & Keys" (located near the profile button).



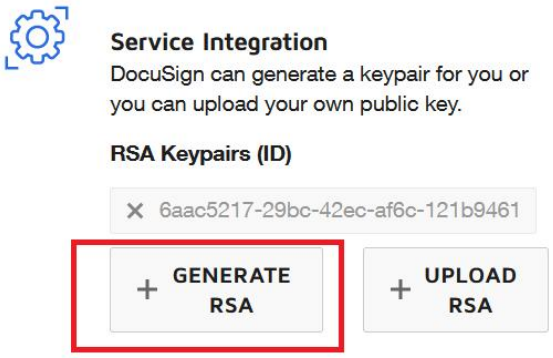
4. Click "Add App and Integration Key."

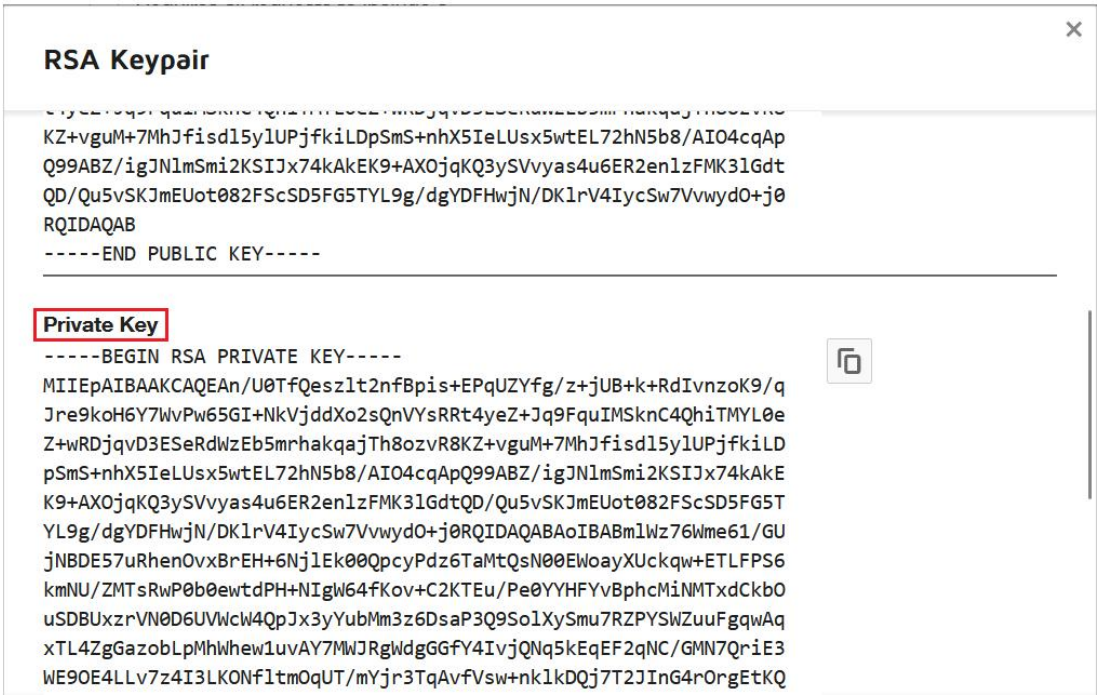


5. Enter an app name (e.g., "Creatio Application") and click "OK."

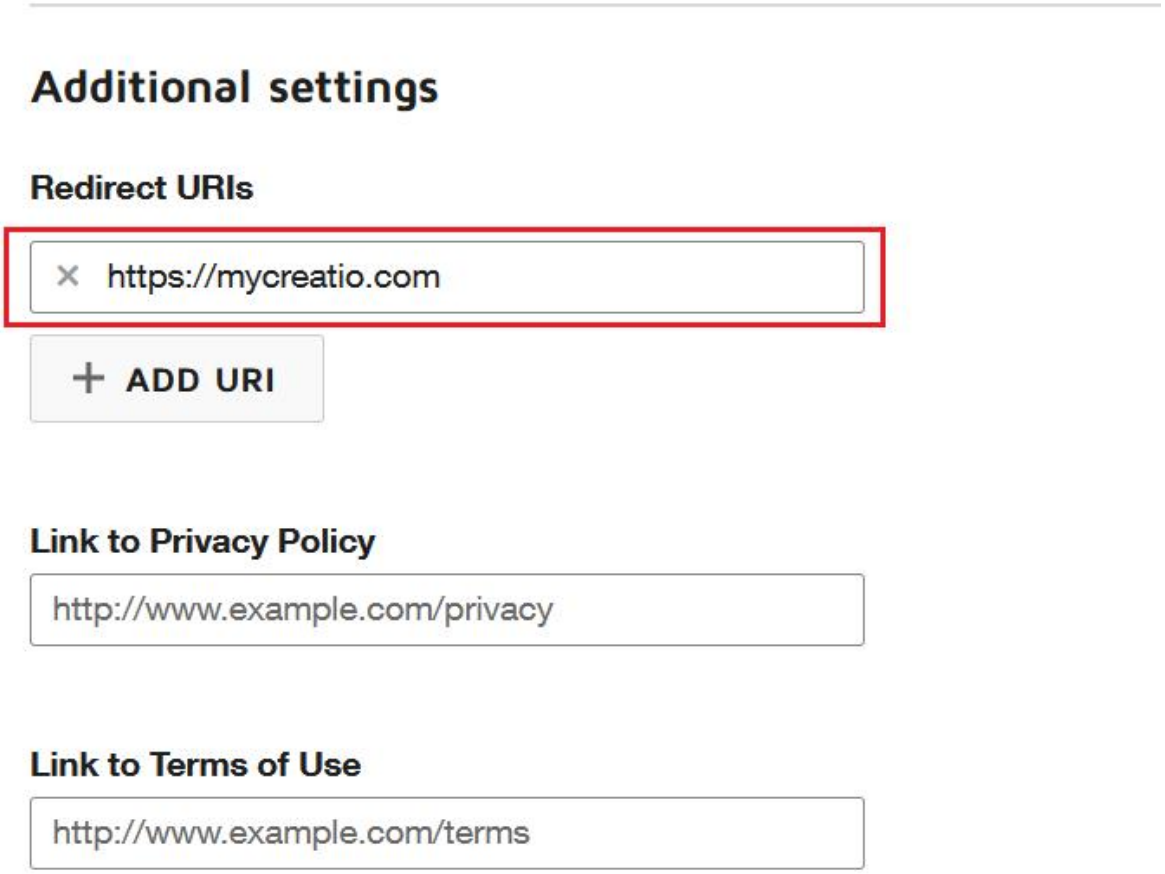


6. Click "Generate RSA" and copy the "PRIVATE KEY" to a safe location. Note that this private key will be shown only once.

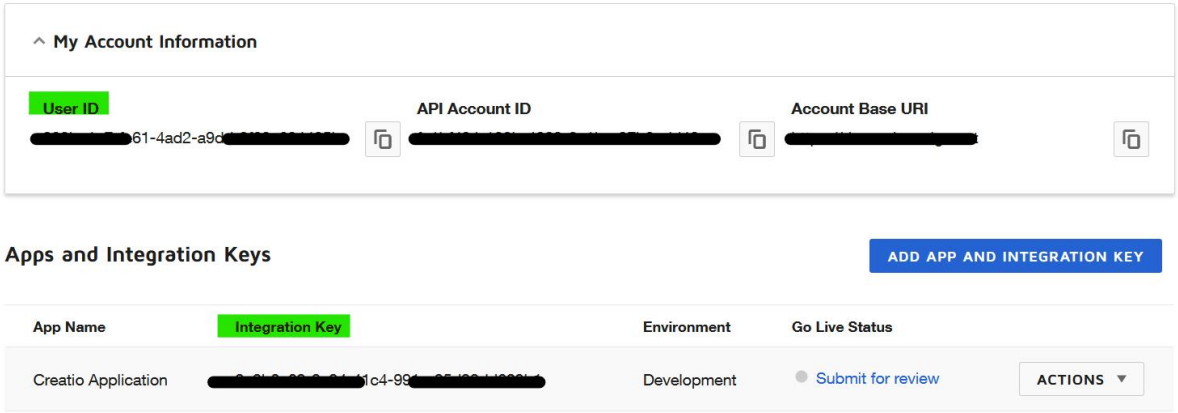




7. Add the redirect URL: https://<creatio domain> Example: https://mycreatio.com



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



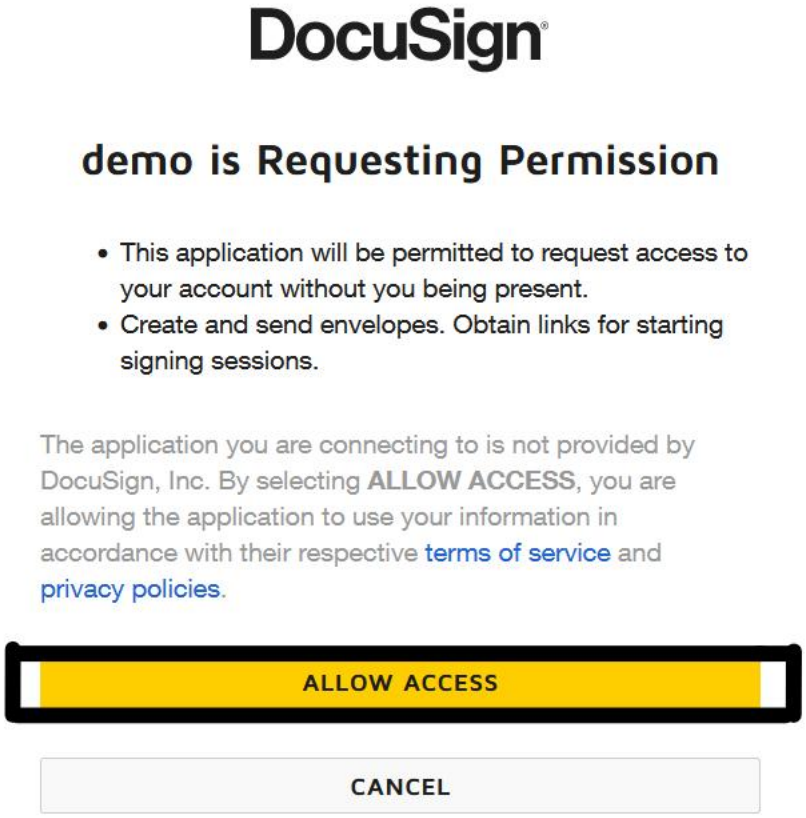
10. Every new user in DocuSign must provide consent.
11. *Open a browser and enter this URL:

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."



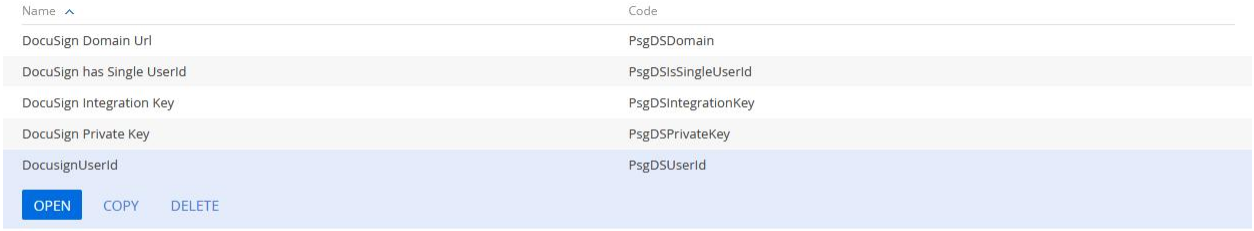
Note: Repeat steps 11 and 12 for each new user and app (new integration key).

8.2 Configuring DocuSign in Creatio (Admin)

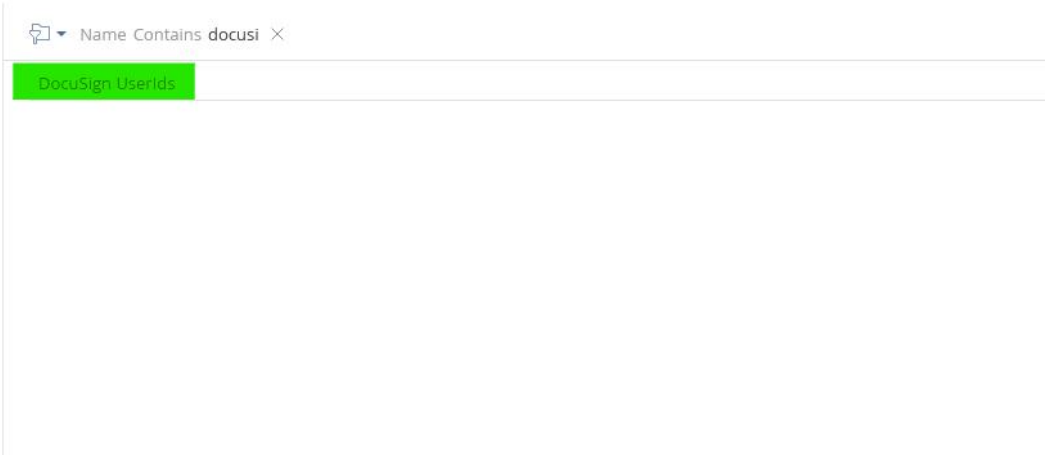
Once DocuSign Account is configured for Creatio, the steps below should be followed.

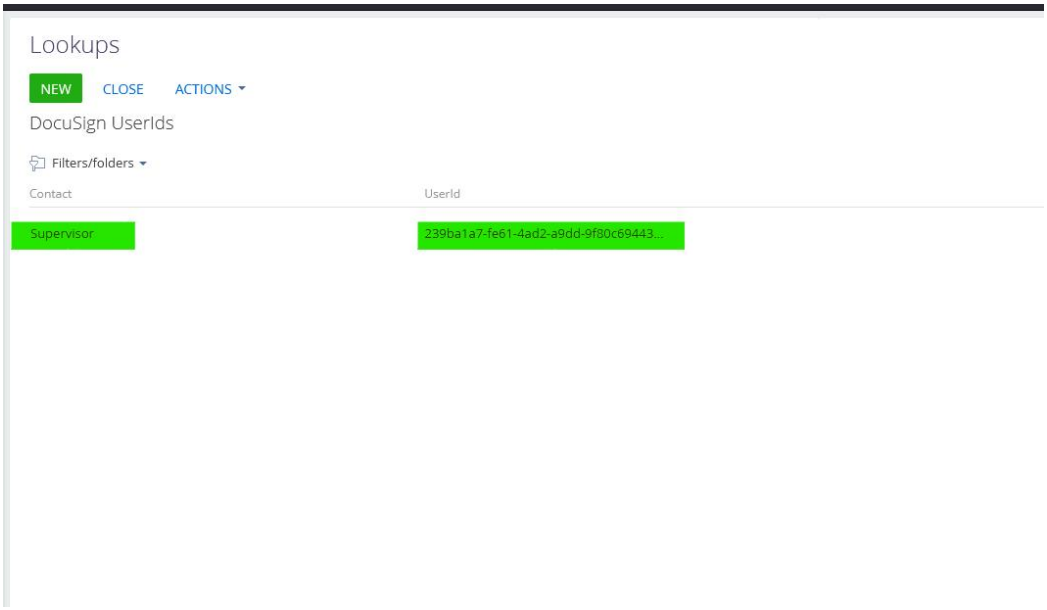
1. Login into Creatio instance

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)

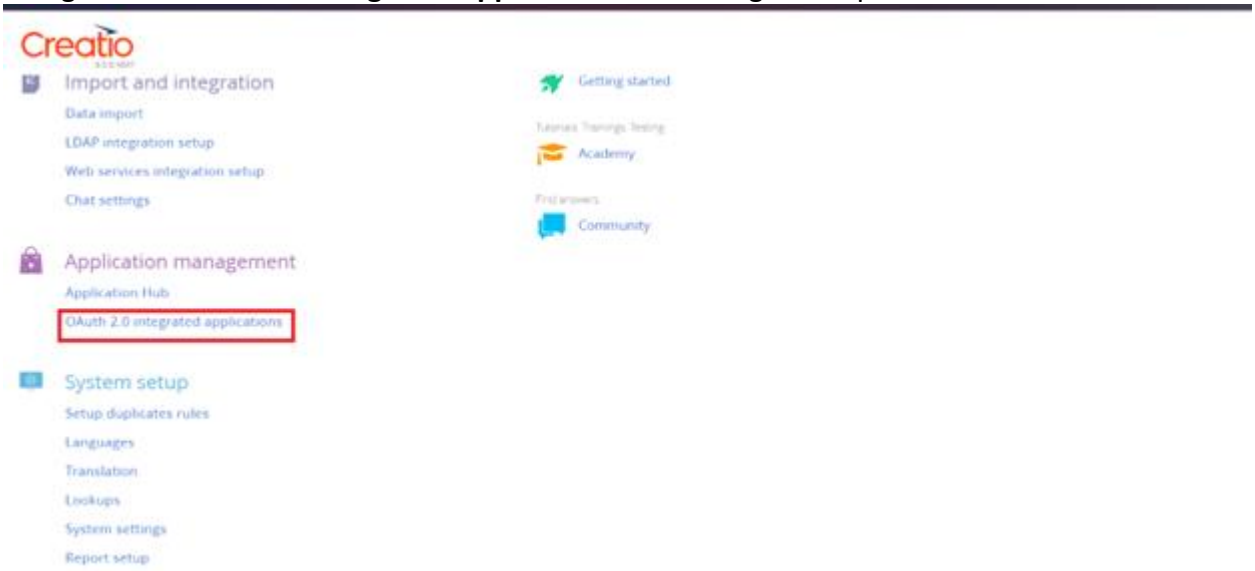


4. Enter “INTEGRATION KEY” in “PsgDSIntegrationKey” system setting.
5. Enter “PRIVATE KEY” in “PsgDSPrivateKey” system setting.
6. If entire Creatio instance has to use one user id, then change “PsgDSIsSingleUserId” system setting value to true.
7. Enter “USER ID” in “PsgDSUserId” system setting.
8.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





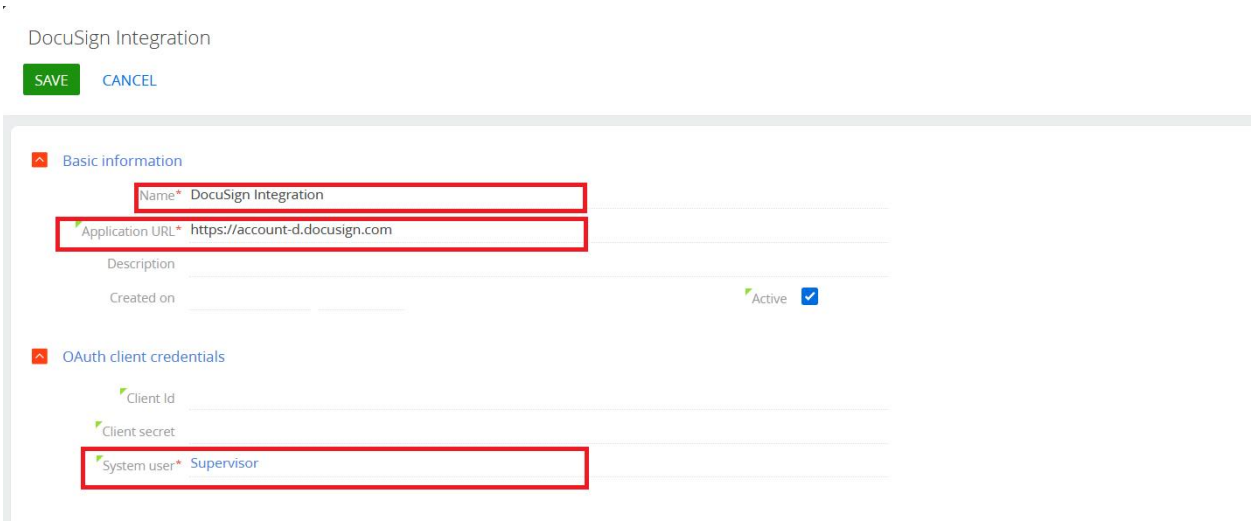
10. Navigate to "**OAuth 2.0 integrated applications**" in settings and open it.



11. Click on "**New**"

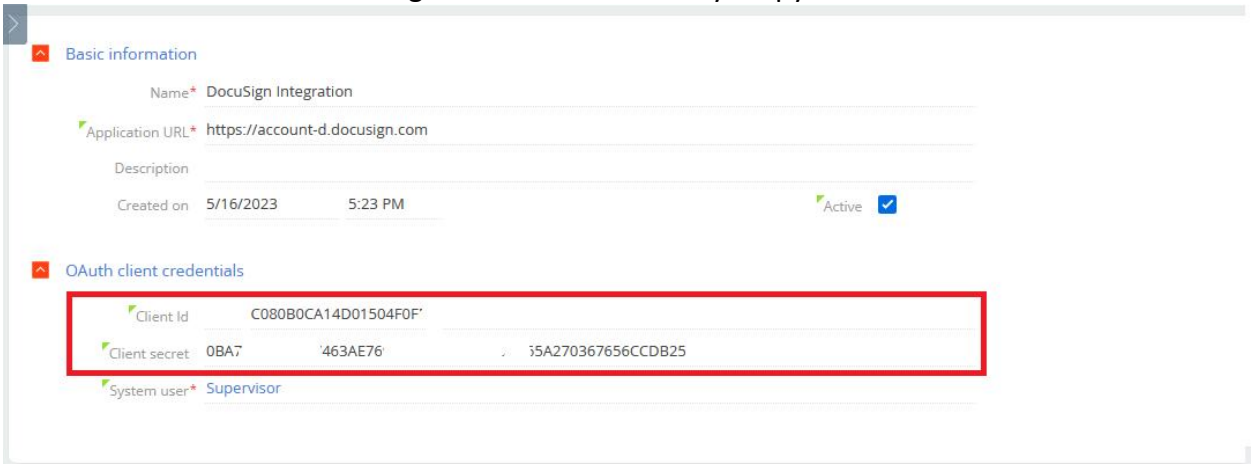
12. Fill the required values as follows
    Name: **DocuSign Integration,**

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

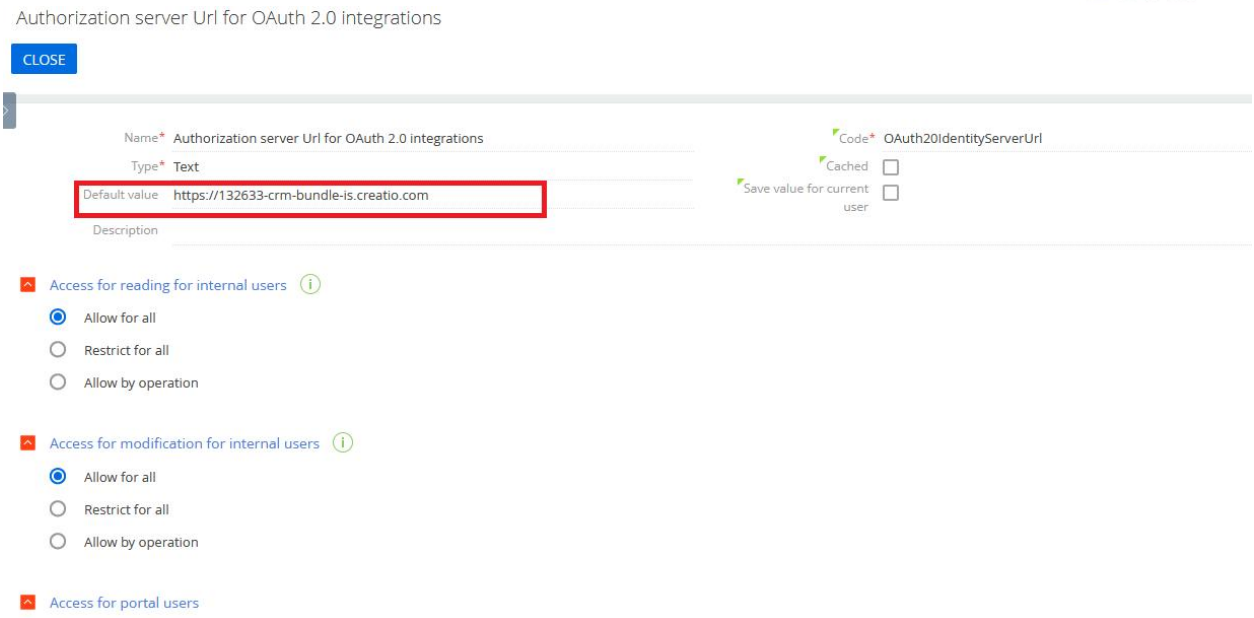


Click on save.

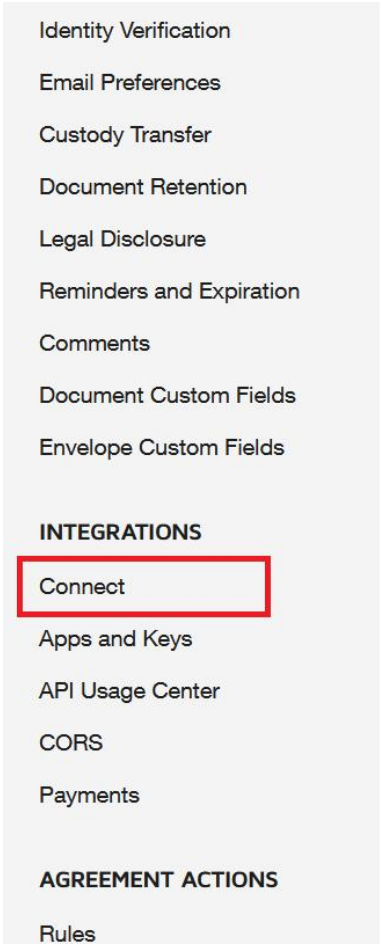
13. Client Id & Client secret will be generated automatically. Copy these values.



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



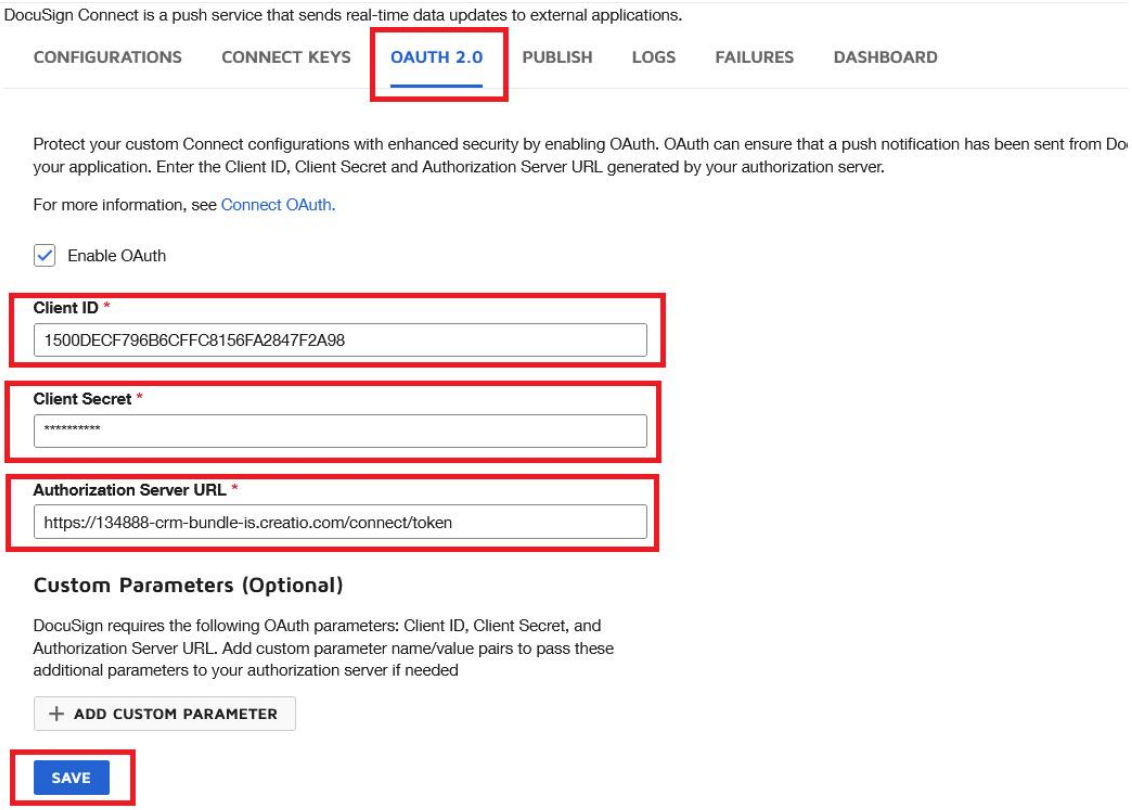
15. Open DocuSign and open "**MyApps&Keys**". Open "**Connect**" in "**Integrations**" section.



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**

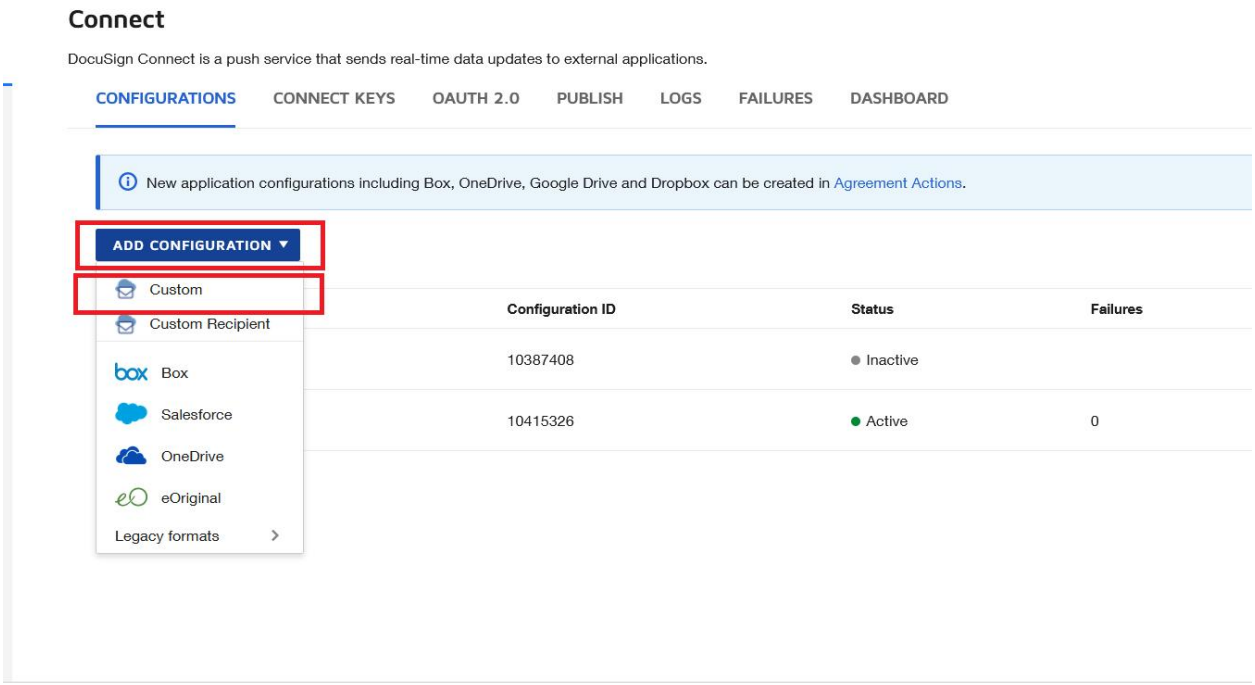
step14>/connect/token

Example: https://056427-sales-enterprise-is.creatio.com/connect/token



Click “Save”

17. Click on “Add Configuration” and Click “ Custom”

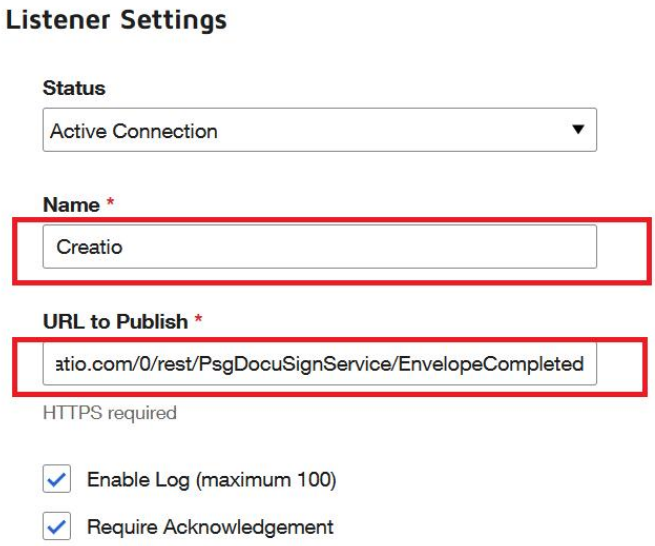


Enter **Name**: Creatio

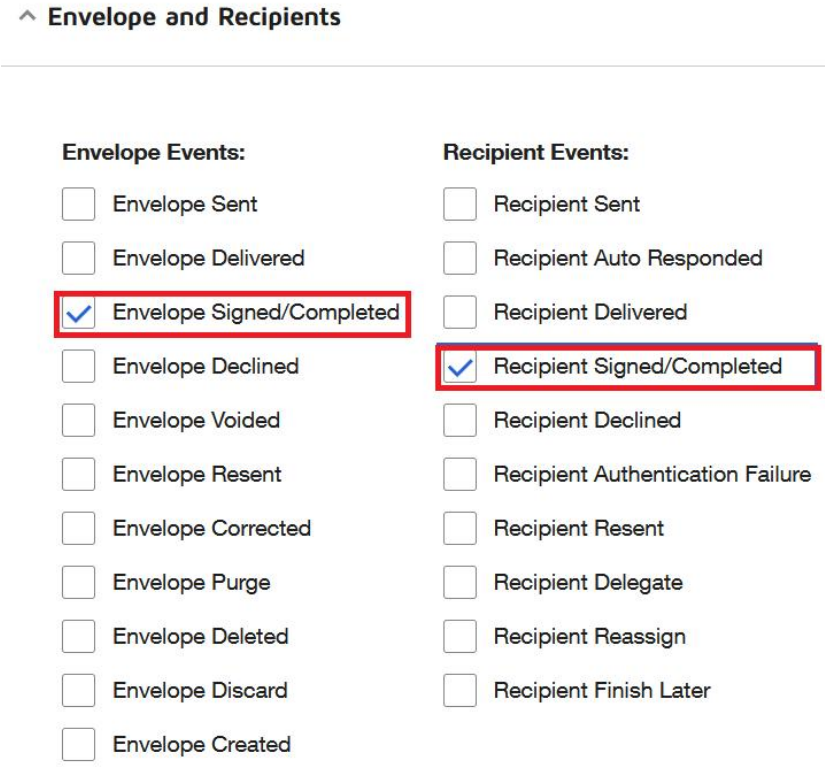
URL to Publish:

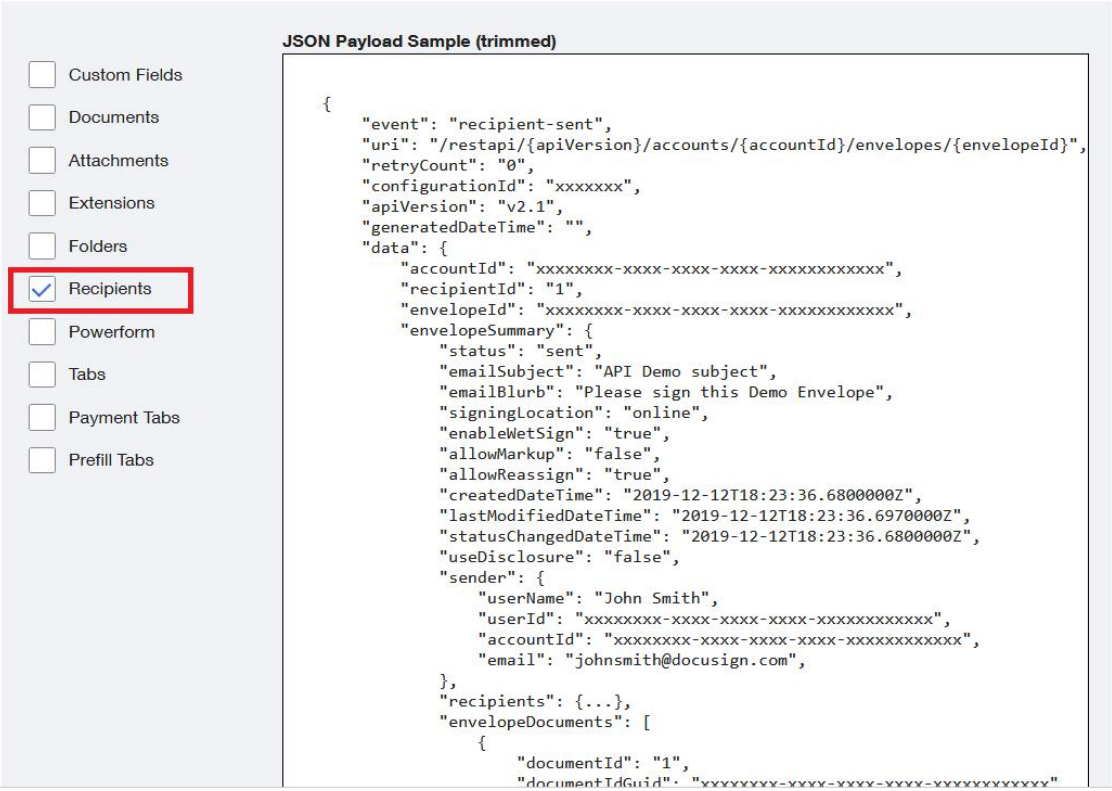
https://<creatiodomain>/0/rest/PsgDocuSignService/EnvelopeCompleted

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

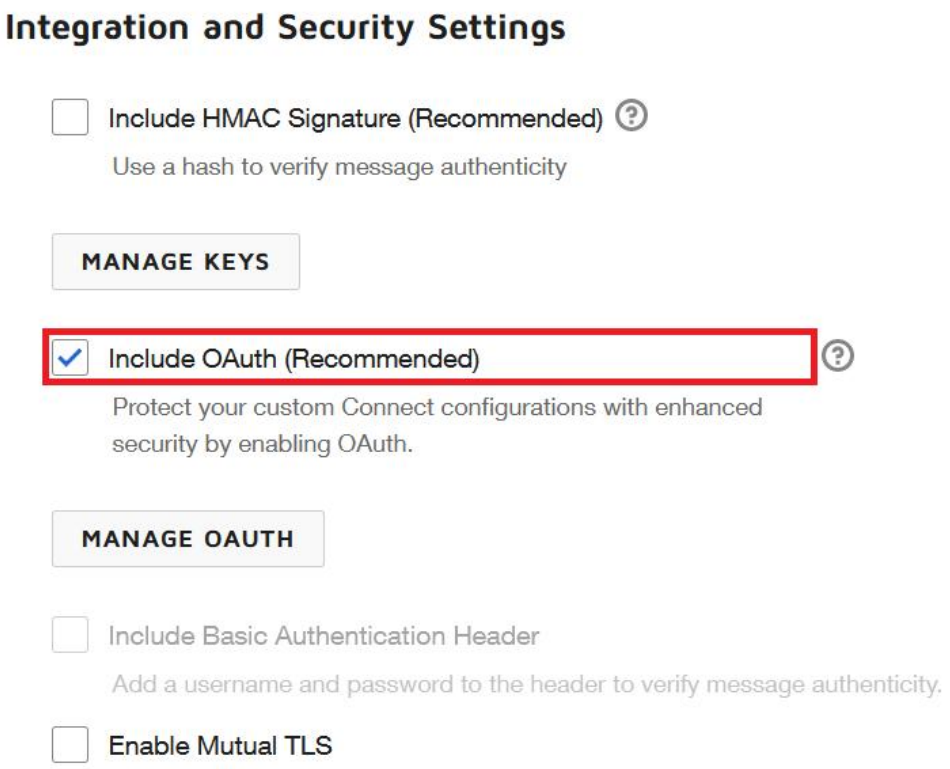


18. Under Trigger events expand **Envelope and Recipients** and check "**Envelope Signed/Completed**", "**Recipient Signed/Completed**", under "**Include Data**" check "**Recipients**"





19. Under " **Integration and Security Settings** " check "**Include OAuth (Recommended)**"



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.

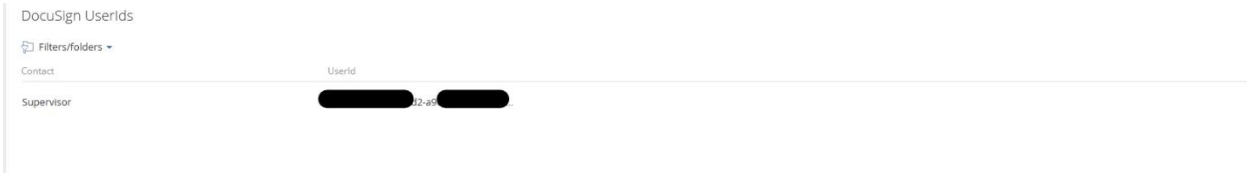
S No	Name	Code	Description
1	DocuSign Domain Url	PsgDSDomain	1. Domain URL of the DocuSign account 2. Example: https://account-d.docusign.com (developers) 3. Example: https://account.docusign.com (Normal Users)
2	DocuSign has Single UserId	PsgDSIsSingle UserId	1. Change the value to true if entire Creatio instance has only one user id
3	DocusignUserId	PsgDSUserId	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

lowing 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.

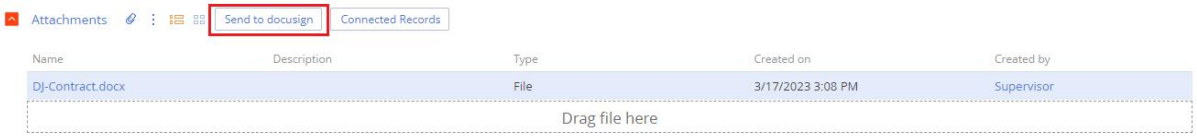
Example:



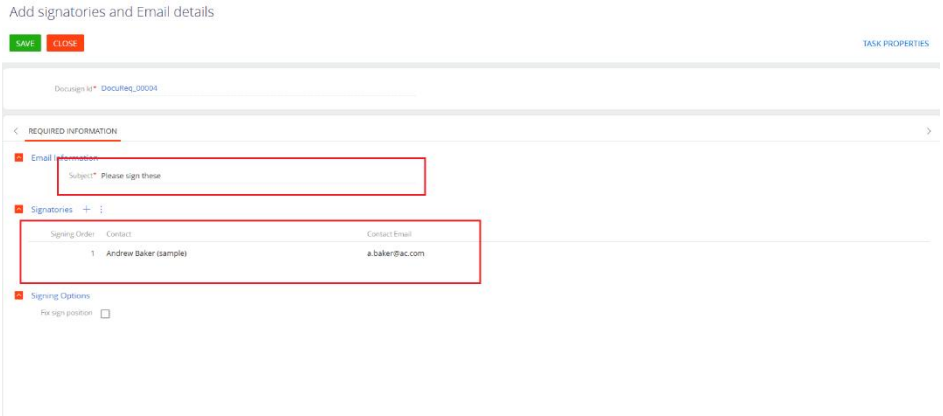
Note: Ensure that each contact is only mapped to one user ID. This helps prevent any confusion or errors that may arise from multiple contacts being assigned to the same user ID or vice versa.

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”

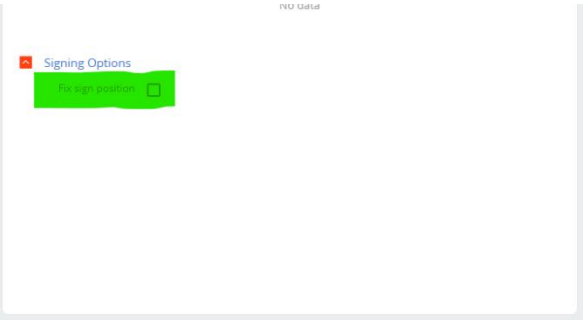


3. Add Email Subject and Signatories (To whom user wants to send documents for signing)

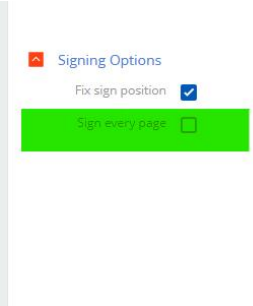


4. To decide the order of signing, you can use the "Signing Order" field which allows you to specify the order in which the signatories should sign the document(s). The lower the number, the higher the priority for signing.
   For example, if there are two signatories and you want the first signatory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

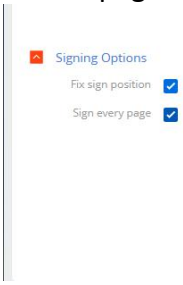
5. In Signing options:
   If “Fix sign position” is not checked then signatory can place their signature any where in the document.



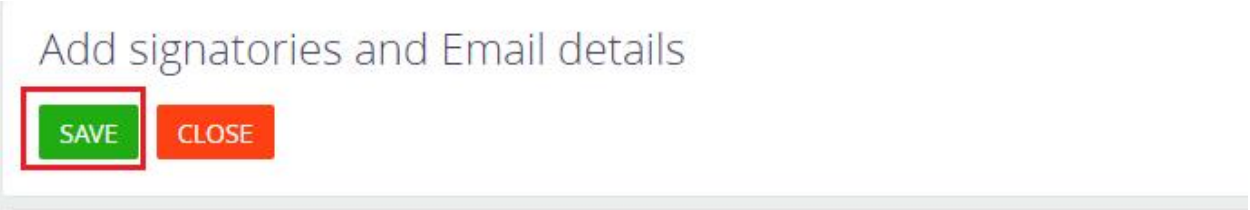
6. If “Fix sign position” is checked then Signatory should place their signature only at the bottom of the page. If “Sign all pages” field is not checked then signatory can place their signature only at the bottom of last page.



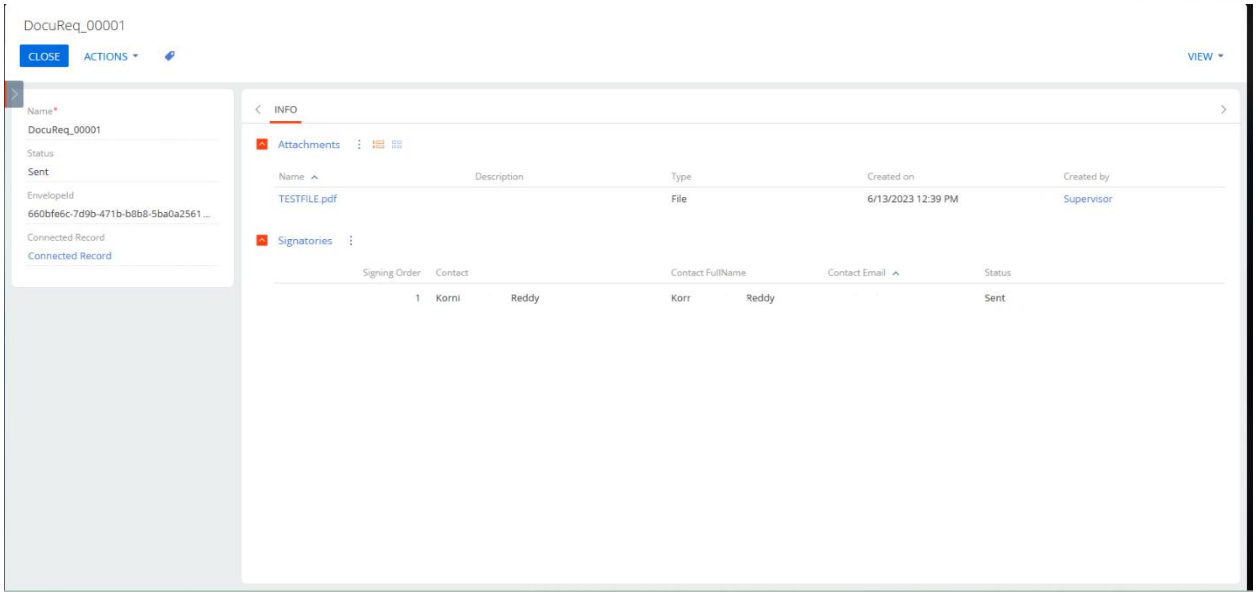
7. If “Sign every page” field is checked then signatory should sign all pages at the bottom of each page.



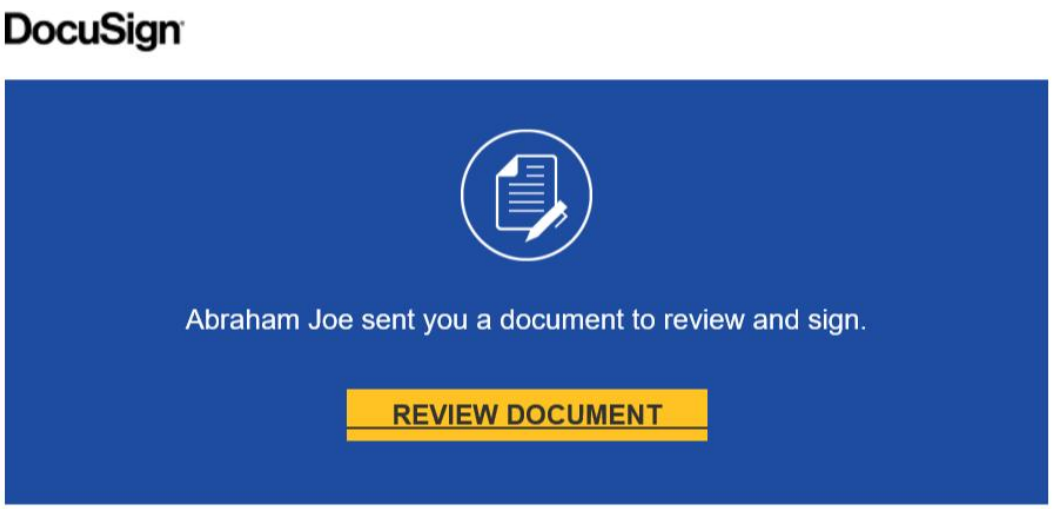
8. After filling all the details click “save”



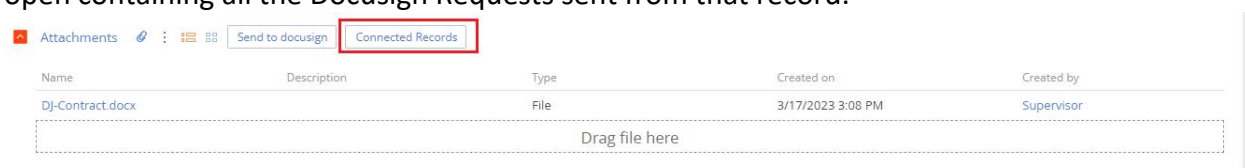
9. After clicking save, mail will be sent to signatories according to their signing order by email. User can check the details of the Request on DocuSign Requests section page.

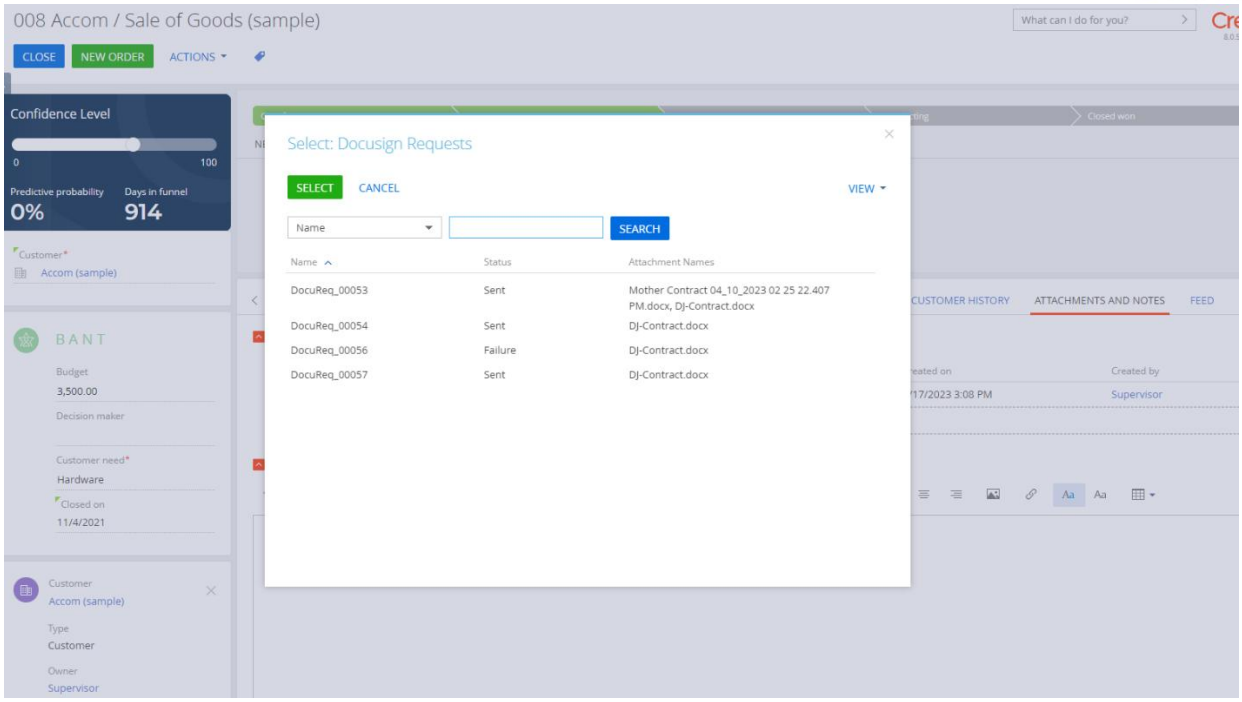


10. Users can check the Status of the DocuSign Request status, DocuSign Envelope Id.
11. If a User clicks on Connected Record, creatio will open the record page from where the request is sent.
12. Users can check individual status of each signatory in “Signatories” tab.
13. Signatory will receive mail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

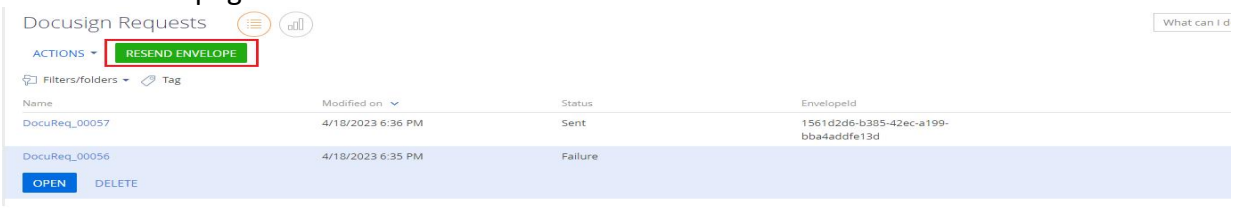


14. They should click on “Review Document” button and complete the signing process, click “Finish”.
15. After everyone finishes the signing process status of the request will be “Completed” and Signed document will be attached in the “Attachments” tab.
16. In the Attachment detail, if user clicks the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

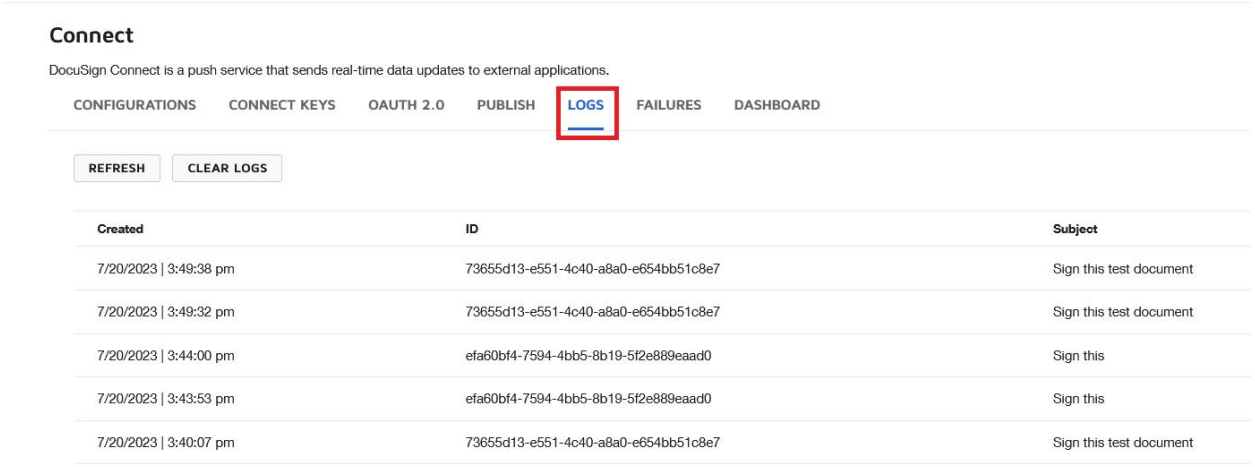




17. User select/double click on any record , creatio will navigate to that DocuSign Record.
18. If there is any error that occurs while sending envelope, status in “DocuSign Requests” will be updated to “failure”. You can resend the request by clicking “RESEND ENVELOPE” on the section page.



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.