DocuSign Connector for Creatio

Integrating world's best e-signature platform

with the best CRM for faster results

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Document Control

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TABLE OF CONTENTS

1 OVERVIEW

DocuSign is changing how business gets done by empowering anyone to send, sign and manage agreements – 100% digitally – anytime, anywhere, on any device with trust and confidence.

QTECX Solutions has integrated the world's most recognised and secured e-signature platform DocuSign with world's powerful CRM, Creatio. This integration enables users to leverage the benefits of digital signing right from Creatio. Creatio as a CRM is central source for all the business Contacts and Accounts, therefore having e-signature capability integrated with CRM allows users to make use of the existing CRM Contacts and Accounts and perform e-Signature transactions with them from CRM without having to switch between multiple applications.

The integration also enables initiation, configuration and management of documents within section records to give users a detailed context of the document's background.

About Us:

QTECX Solutions is an expert Creatio consulting firm and provides implementation and integration services that enables you to execute your strategic initiatives for business growth. Our in-house ability to identify, design, and integrate outputs personalised solutions and efficient processes. From your requirements to planning stage to implementation, we tailor our work to your unique requirements and needs.

We engage with you and work towards a goal, offering our consulting knowledge and technical expertise throughout the journey. Our services are designed to improve customer satisfaction, reduce costs, increase productivity and improve return of investment (ROI). Our team has consulting experience with market leaders in Banking & other Financial Institutions, Retail, Food, Higher Education institutes, Payments, Airlines, and Telecommunications.

With over 30 years combined global experience of designing flexible and efficient end-to-end solutions, we go above and beyond to help you enhance your customer experience.

2   CONNECTOR SETUP

2.1   DocuSign Configuration

Pre-requisites for API-based integration with DocuSign:

- DocuSign API-based account: Business Pro or Enterprise Pro. If you need a new account, please contact us at info@qtecx.com.au to provide you with a competitive pricing.
- DocuSign Developer account ready to configure

If you already have an API-based DocuSign account, you need to create a DocuSign Developer account here using your DocuSign account user credentials.

Once you have logged in to the DocuSign Developer account, go to **Settings** (top bar) and the click **Apps and Keys** on the left menu bar.

2.1.1   Setting up DocuSign Developer Account

If you already have a DocuSign Developer account, skip this step and go to the next one.

Create a DocuSign Developer account here using your DocuSign account user credentials.

Once your account is ready, log in to the Developer account.

Copy the DocuSign Account ID from top left and save it somewhere safe. You will need to enter this in Creatio later.

DocuSign eSignature

QTECX Solutions
Account ID: 272
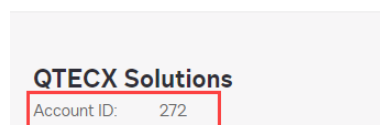
Click **Settings** (top bar)

Click **Apps and Keys** on the left menu bar.

Copy the Account Base URI and save it somewhere safe. You will need to enter this in Creatio later.

[You do not need User ID and/or API Account ID.]

Apps and Keys

When building a DocuSign integration, you must first create an app and integration key. This key is required to call any DocuSign API, either directly or by using an SDK.

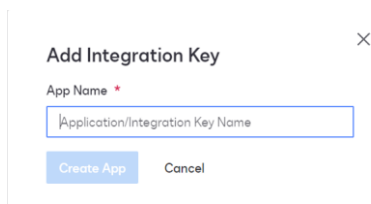Create apps and keys manually or edit keys created automatically for you by Quickstart.

∧ My Account Information		
User ID	**API Account ID**	**Account Base URI**
		https://demo.docusign.net
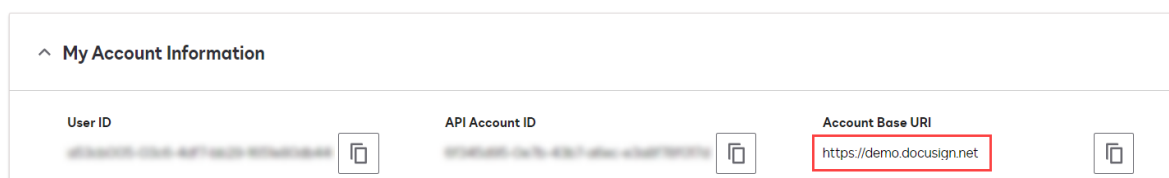
Apps and Integration Keys

[Add App and Integration Key]

Click **Add App and Integration Key**
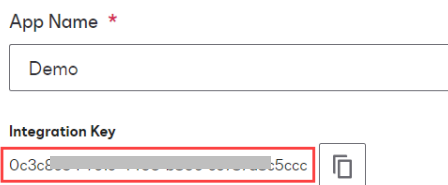
Write App Name (e.g. Creatio) and click Create App

Add Integration Key   ✕

App Name *

[Application/Integration Key Name]

[Create App]   Cancel

Copy the Integration Key and save it somewhere safe. You will need to enter this in Creatio later.

General Info

App Name *

[Demo]

Integration Key

[0c3c8⋯⋯5ccc] [⧉]

Under Authentication, click **Add Secret Key**. Copy the newly generated Secret Key and save it somewhere safe. You will need to enter this in Creatio later. Do not change any other setting here.

Authentication

Not sure which settings to use? <u>Learn more</u>

User Application

Is your application able to securely store a client secret?

⦿ Yes

◯ No

Authentication Method for your App

Authorization Code Grant

Used for integrations where each user logs in individually and requires a one-time consent for the app to use their account.

☐ Require Proof Key for Code Exchange (PKCE) RECOMMENDED

Requires all requests to include a code verifier and code challenge, which protects your app against malicious attacks.

Secret Keys

[＋ Add Secret Key]

Under **Additional settings**, click **Add URI**.

Additional settings

Redirect URIs

[＋ Add URI]

Paste the following value:

```
https://yourinstance.creatio.com/0/ServiceModel/ServiceOAuthAuthenticatorEndpoint.svc/AuthorizationCodeRedirectHandler
```

Replace *yourinstance* above with actual subdomain in your Creatio URL (e.g. if your Creatio URL is https://acme.creatio.com, then:

```
https://acme.creatio.com/0/ServiceModel/ServiceOAuthAuthenticatorEndpoint.svc/Autho
rizationCodeRedirectHandler
```
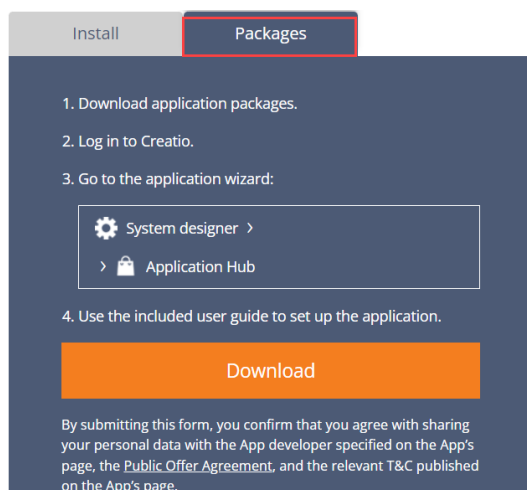
Click **Save**.

Save   Cancel

2.2   Creatio Configuration

2.2.1   Install the QTECX Solutions DocuSign Connector in Creatio

Follow these steps to set up your Creatio instance:

Download the Connector package files from this link.

Click INSTALL button on the main banner. Go to Package tab and download the package files.

Go to Settings (top right gear icon)

Go to **Application Hub**

Click **New application**

Select **INSTALL FROM FILE** option

Click **SELECT FILE**

Select the downloaded package file and click Open

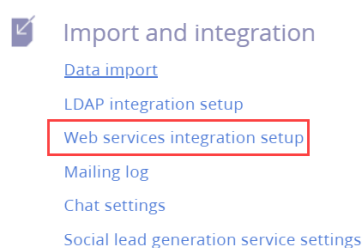Creatio will install the Connector and show a message when completed.

If it is successful, go to the next step.

If it is not successful, download the log file and share with us on info@qtecx.com.au.

2.2.2   Setting up Creatio – Web services

Go to Settings (top right gear icon)

Select **Web services integration setup**

Click **QTECX DocuSign**.

Click OK if you get a popup box like this:

The package of the web service cannot be modified
or you do not have permission to edit this web
service. Copy this web service or modify the
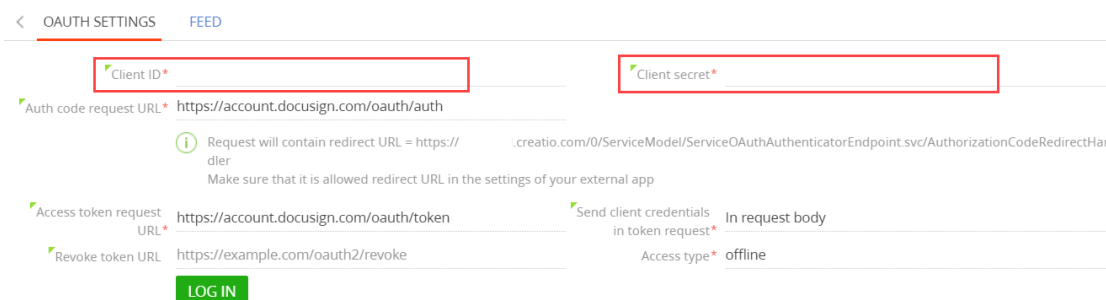"Current package" system setting, or obtain
corresponding permissions.

OK

Click AUTHENTICATION and the arrow next to DocuSign.

< METHODS   AUTHENTICATION

Authentication* OAuth 2.0
Application 🔑 DocuSign   ⬈ ⓘ
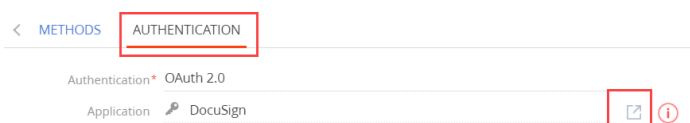
Client ID: Enter the Integration Key (from DocuSign account).

Client secret: Enter the Secret Key (from DocuSign account).

< OAUTH SETTINGS   FEED   >

Client ID*   Client secret*

Auth code request URL* https://account.docusign.com/oauth/auth

ⓘ Request will contain redirect URL = https://   .creatio.com/0/ServiceModel/ServiceOAuthAuthenticatorEndpoint.svc/AuthorizationCodeRedirectHan
dler
Make sure that it is allowed redirect URL in the settings of your external app

Access token request
URL* https://account.docusign.com/oauth/token   Send client credentials
in token request* In request body

Revoke token URL https://example.com/oauth2/revoke   Access type* offline

LOG IN

Auth code request URL:

- For DocuSign Developer: https://account-d.docusign.com/oauth/token
- For DocuSign Production: https://account.docusign.com/oauth/token

Access token request URL:

- For DocuSign Developer: https://account-d.docusign.com/oauth/token
- For DocuSign Production: https://account.docusign.com/oauth/token

Click **Save**.

Click **Save**.

2.2.3 Setting up Creatio – System Settings
Go to Settings (top right gear icon)

Select **System settings**

Filter on "DocuSign Account".

Click **DocuSign Account Id**.

Enter DocuSign Account ID from the DocuSign account.

Click **Save**.

Click **Close**.

Click **DocuSign Account URI.**

Enter DocuSign Account ID from the DocuSign account.

Click **Save**.

Click **Close**.

2.2.4 Setting up Creatio – Operation permissions
Go to Settings (top right gear icon)

Select **Operation permissions**

Filter on DocuSign and click on the permission for Opportunity.

Operation permissions

NEW OPERATION

Name Contains DocuSign ✕

Name ∧

Send To DocuSign Action on Contracts

Send To DocuSign Action on Opportunity

Click on the + sign to add users who will use DocuSign Connector. Only these users will see the DocuSign button in the section record.

Send To DocuSign Action on Opportunity

CLOSE

Name* Send To DocuSign Action on Opportunity

Description Configure who will have access to initiate DocuSign Requests action on Opportunity Section by adding users / roles here

∧ Operation permission [∧] [∨] [+] ⋮

Click Save/Close.

To enable the button in the Contracts section, select the permission for Contracts section and add users as shown above.

Once the users have been added, these users will need to log off and log on to see the button in the Opportunities sections

Make sure users that should work with DocuSign requests have the allocated DocuSign Connector for Creatio license.

Your Connector is ready to be used by users.

3 USING DOCUSIGN CONNECTOR FEATURES

3.1 Create a DocuSign Request from Opportunity/Contract

Go to an Opportunity/Contract section and open a record. If the user has been given the operation permission (see Section 2.2.4 above), the user will see a SEND TO DOCUSIGN button on top right.

Click the button. This will open a DocuSign Request page

If you are not logged in to DocuSign, you will get a page where you need to click LOGIN.

You will be redirected to DocuSign to log in using your DocuSign account credentials. Then you will be back on this page where you need to click CONTINUE. Once logged in, you will not be asked to log in again.

When the DocuSign Request page opens, select an Email Template value with same name as the section you are creating the request in.

Select the signers with valid email address in the Participants detail. Check the Order (the signing order) is correct for the signers. The contacts in the Opportunity/Contracts sections are auto-filled to save your time.

In the Attachment tab, either upload a document or select an existing document.

Click SEND/SUBMIT button.

3.2 Tracking a DocuSign Request from Opportunity/Contract

This Connector automatically updates the information in real-time, without any user actions required.

Go to the section record where you created the DocuSign Request. Click on the DocuSign request in the DocuSign Requests detail. Here you will find all the necessary information to track the envelope progress.

When envelope is signed by all the signers, the signed document with Certificate of Completion (from DocuSign) will available in Creatio in the DocuSign Request record. The signer document has "-Signed" at the end of the filename.

4 INTEGRATING DOCUSIGN WITH CUSTOM SECTIONS

We can configure more modifications and customisations based on your process and requirements in new and custom sections. Please contact us at info@qtecx.com.au with your requirements.

Please feel free to contact us if you have any questions. We guide our customers throughout the journey of implementing the QTECX Solutions DocuSign Connector to ensure our customers get an excellent experience. We have worked globally with customers in the US, the UK, Canada, Mexico, France, Belgium, Netherlands, Italy, India and Australia.