

DocuSign Connector for Creatio

Solution Guide



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Document Control

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Document Scope

This user manual will assist users in using DocuSign Connector functionality implemented in Creatio by QTECX Solutions.

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1 CREATIO DOCUSIGN INTEGRATION

Organizations leveraging the capabilities of Creatio platform very often find themselves in the need to exchange electronically signed documents with their customers as part of their business workflows. This exchange is required at different stages of sales and marketing workflows by various groups within the organization.

DocuSign, an e-signature provider, is now integrated by QTECX Solutions with Creatio to enable 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. The DocuSign connector allows users to make use of the data in the CRM and enables e-Signature transactions without users to switch between multiple applications.

The connector is configurable to support all the out-of-the-box as well as custom Creatio sections. It initiates a signed document request, notifies when the document is signed, and keep track of the signed documents within Creatio.

1.1 Intended Audience

The document is targeted for business teams. The business team may include Project Manager, Product Owner, CRM Functional Consultant, Business Analyst or member(s) from executive team that looks at the business aspect of a project.

2 FEATURES

The connector supports the following features:

- Initiate DocuSign requests directly from a section in Creatio
- Auto-detection and capturing participants in the DocuSign request
- Multiple configuration templates for automatic filling of data
- Storage of signed Documents and certificates along with the DocuSign Request
- Supports multiple document formats (Microsoft Word, PDF)
- Tracking and traceability from initiation to completion
- Cancellation of requests by authorized users
- Notifications in Creatio for participants and the DocuSign request in general
- Configurable to allow only authorized users to initiate and access DocuSign Requests
- Supports authentication as part of the Signing process, if required
- Configurable message templates
- Configurable participant prefilling criteria and pre-filling source
- Configurable participant prefilling order (for parallel and sequential signing)
- Configurable events for which notifications has to be generated

3 DOCUSIGN CONNECTOR

The integration also enables initiation, configuration and management of documents within **Opportunities** section (by default) that gives users a detailed context of the document's background.

3.1 DocuSign Request Management

DocuSign requests can be managed centrally from **DocuSign Requests** section. From **DocuSign Requests** section users can access and view details of each DocuSign Request. The section can be configured by CRM administrator to be made available to different users and roles.



Figure 1: depicts how DocuSign Requests section will appear in the left Navigation panel.

Name	Date	Status	Type	Reason	# of Signatories	Last Status Received On	Initiated On	Completed On
DSR-04152/2020 04:58	05A-0000080	Voided	TL-001	Supervisor	1	4/15/2020 1:59 PM	4/15/2020 1:59 PM	
DSR-04152/2020 04:26	05A-0000079	Completed	TL-001	Supervisor	1	4/15/2020 12:29 PM	4/15/2020 12:27 PM	4/15/2020 12:29 PM
DSR-04152/2020 03:09	05A-0000078	Completed	TL-001	Supervisor	2	4/15/2020 12:21 PM	4/15/2020 12:19 PM	4/15/2020 12:21 PM
DSR-04152/2020 02:46	05A-0000072	Sent	TL-001	Supervisor	2	4/15/2020 11:47 AM	4/15/2020 11:47 AM	
DSR-03432/2020 12:35	05A-0000068	Sent	TL-001	Supervisor	1	3/12/2020 9:35 PM	3/12/2020 9:35 PM	
DSR-03432/2020 04:11	05A-0000063	Completed	TL-001	Supervisor	1	3/12/2020 3:13 PM	3/12/2020 5:11 PM	3/12/2020 4:13 PM
DSR-03432/2020 03:36	05A-0000062	Completed	TL-001	Supervisor	2	3/12/2020 2:57 PM	3/12/2020 4:53 PM	3/12/2020 2:57 PM
DSR-03432/2020 04:44	05A-0000060	Sent	TL-001	Supervisor	1	3/12/2020 1:49 PM	3/12/2020 3:49 PM	
DSR-03432/2020 04:42	05A-0000059	Sent	TL-001	Supervisor	1	3/12/2020 1:43 PM	3/12/2020 3:43 PM	
DSR-03432/2020 02:59	05A-0000052	Completed	TL-001	Supervisor	1	3/12/2020 1:12 PM	3/12/2020 2:58 PM	3/12/2020 1:12 PM
DSR-02152/2020 01:26	05A-0000049	Sent	TL-001	Supervisor	1	2/12/2020 10:27 PM	3/12/2020 10:27 AM	
DSR-02152/2020 11:33	05A-0000041	Sent	TL-001	Supervisor	1	2/12/2020 8:34 PM	2/12/2020 10:34 PM	
DSR-03432/2020 01:25	05A-0000048	Voided	TL-001	Supervisor	1	1/31/2020 11:00 AM	3/12/2020 10:26 PM	
DSR-04152/2020 03:19	05A-0000074	Voided	TL-001	Supervisor	1	1/31/2020 11:00 AM	4/15/2020 12:24 PM	
DSR-03432/2020 06:47	05A-0000064	Voided	TL-001	Supervisor	1	1/31/2020 11:00 AM	3/12/2020 5:47 PM	
DSR-04152/2020 04:37	05A-0000078		TL-001	Supervisor	1			
DSR-04152/2020 04:57	05A-0000079		TL-001	Supervisor	1			
DSR-04152/2020 03:41	05A-0000076		TL-001	Supervisor	1			
DSR-04152/2020 03:57	05A-0000077		TL-001	Supervisor	1			
DSR-03432/2020 08:44	05A-0000064		TL-001	Supervisor	1			
DSR-03432/2020 06:44	05A-0000065		TL-001	Supervisor	1			

Figure 2: DocuSign request listing

008 Accom / Sale of Goods - Changed in Request

Code* DSR-0000172

Name* QTX-Loan-002 - Changed inline

Owner* Supervisor

Opportunity QTX-Loan-002

Status Completed

Last Status Received On 7/04/2020 4:29 PM

EnvelopeId e61c1f90-883a-4491-89ec-40f40a26bb...

GENERAL INFORMATION ATTACHMENTS AND NOTES

Remarks

Timeline

Initiated On 7/04/2020 3:55 PM Completed On 7/04/2020 4:29 PM

Last Status Received On 7/04/2020 4:29 PM

Participants

Order	Contact	Account	Email	Role	Signature Tag	Name	Acc...
1	Hatim Hussain	Our company	hatimal@gmail.com	Needs to Sign	Signer 1	Hatim Hussain	Borr over /Inve stor
2	Jon Snow	QTECX Solutions	k33plearning@gmail.com	Needs to Sign	Signer 2	Jon Snow	

Envelope History

Status	Event Date	Void Reason
Completed	7/04/2020 4:29 PM	
Sent	7/04/2020 3:55 PM	

Recipient History

Order	Contact	Account	Status	Email	Status Date
2	Jon Snow	QTECX Solutions	Completed	k33plearning@gmail.com	7/04/2020 4:29 PM
2	Jon Snow	QTECX Solutions	Sent	k33plearning@gmail.com	7/04/2020 4:29 PM
1	Hatim Hussain	Our company	Completed	hatimal@gmail.com	7/04/2020 4:29 PM
1	Hatim Hussain	Our company	Sent	hatimal@gmail.com	7/04/2020 3:55 PM

Figure 3: DocuSign Request Page

3.1.1 Participants

The **Participants** detail lists all the participants that are a part of the DocuSign request (either as a Signer or Carbon Copy recipients). Signing order, role of each participant, along with the contact details can be seen from this detail.

3.1.2 Envelope History

This Detail is automatically updated by the system as soon as any status is received from DocuSign related to an Envelope.

3.1.3 Recipient History and Status Monitoring

This Detail is automatically updated by the system whenever a status is received for any participant of the DocuSign request. This detail can be used to review the DocuSign request progress in real time and also helps in reviewing the time taken by each participant.

3.1.4 Attachments

The Attachments tab can be used to access the following documents:

Document	Description
Signature Document	The original document attached with the DocuSign Request. The name of this attachment will be same as the document name.
Signed Document	A pdf file, that represents the Signed document after Signing has been completed by all the recipients and copied here automatically by the system. The name of this file will be similar to the Signature Document name. This document is only available when the status of the DocuSign Request is Completed
Certificate of Signature	A report generated by DocuSign upon completion of signing

In addition to the **DocuSign Requests** section, the DocuSign request initiated for an opportunity can also be seen in on the Opportunity Page.

3.2 DocuSign Request Process

3.2.1 Initiating Request

Users with privilege of initiating a DocuSign Request have **“Send to DocuSign”** action available on the top right corner of the Opportunity page. This action initiates the Signing process by checking if the logged in user has a valid access token of DocuSign. If not, the user will first be redirected to Login page and after successful login the DocuSign Request setup process will continue.

The following picture depicts Send to DocuSign action on Opportunity page:

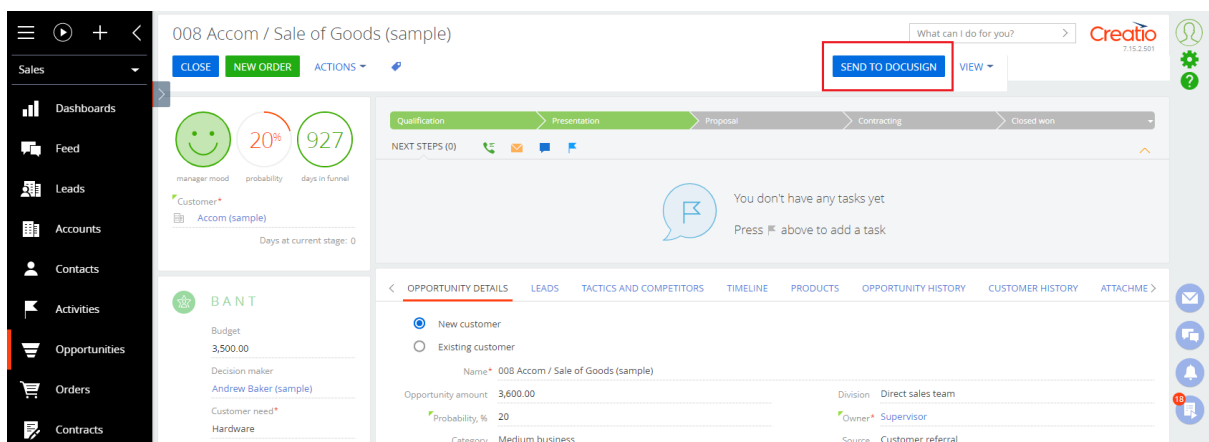


Figure 5

3.2.2 Log in Page

In case the user doesn't have a valid sign-in token available, the following page will open with Login action available on the top as shown in Figure below:

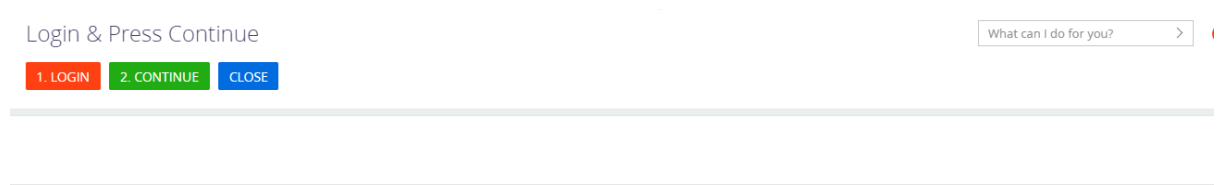


Figure 6

Upon pressing the **Login** button, a new window will open with DocuSign Login page. The user must enter their DocuSign credentials on this Page and upon successful login, the user will be taken back to Creatio's page shown above.

To complete the Login process, the user must press **Continue** as shown in **Figure 6**. This will proceed the DocuSign Request generation process to the next step

Note: After successful login, user will not be prompted to Login to DocuSign in all the subsequent DocuSign Requests for the day until the token expiry time has lapsed in which case the Login process has to be completed before sending the DocuSign Request.

3.2.3 Request Participants

In this step, the user is directed to a page with details of the draft DocuSign Request. The user can modify the request here before submitting the request for signing to the recipient. The process automates reading of related contacts from different fields and Details on the Opportunity page and adding them to the draft DocuSign request presented to the user. This saves the Request Initiator considerable effort of adding relevant contacts manually to the draft DocuSign Request.

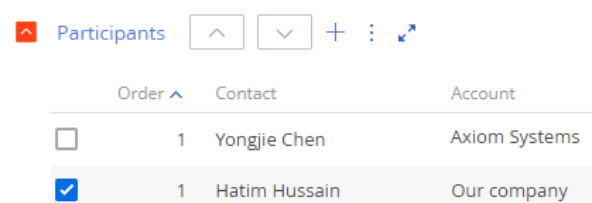
Note: The fields and Details from which contacts are fetched are configurable and can be changed by the System Administrator.

The prefilling of contacts in the draft DocuSign Request is governed by the following rules:

- Participant must always be a Contact in Creatio
- A contact or an account if appears multiple times in the Detail associated to Opportunity, then the contact may appear multiple times as a participant
- A participant Contact must have an email address and Name. If not, it will be removed automatically before the DocuSign Request is submitted
- All auto filled participants are added as not included in the DocuSign Envelope by default. The signers must be explicitly selected to include them in the DocuSign Envelope

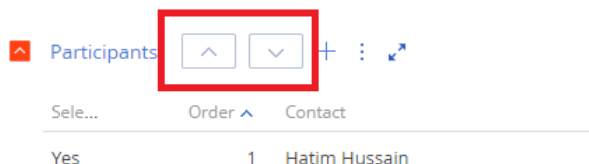
3.2.4 Participant Selection and Ordering

The Request Owner must explicitly select the participants to be included in the DocuSign Request by selecting them using the check boxes available on Participants Detail as shown in the screenshot below



The **Order** attribute determines the order in which selected participants will receive the DocuSign request. For example, the participant with Order 1 will receive the request first.

The Request owner can also modify the order of each participant by moving them up or down using the position actions on Participants Detail. The picture below depicts those actions:



3.2.5 Signature Tags

The connector supports signature tags to determine the location in the document where the signing option will be presented to the Signer. For example, if a document has Signer 1 tag defined on 3rd Page and Signer 2 tag defined on 4th page of the document, then the Participant with Signer 1 tag in Creatio will be taken to Page 3 and the Participant with Signer 2 tag will be taken to the Page 4.

3.2.6 Parallel Signing

The Request Owner can set the same Order for selected participants to send the signing request at the same time for parallel signing. This can be achieved by setting the Order to the same number.

3.2.7 Adding and reviewing a document

The document for signature can either be dragged and dropped to the Attachments detail or can be added by pressing the add Attachment action (paperclip icon).

After a document is added, it can be downloaded again for further review. The document can also be removed and added again as long as it doesn't exceed the limit of one document per DocuSign request.

3.2.8 Adding a Participant manually

DocuSign Request Owner can add more participants if they are not pre-filled by the system automatically. This can be done by pressing the Add button on Participant Detail. A popup will be presented to the user from where the user can search for all contacts within Creatio and add them to the request.

The following roles can be configured for the participants:

Role	Description
Needs to Sign	Participant with this role are considered as Signer who will perform the Signing ceremony on the Document sent with the request. This is a default role assigned to pre-filled participants and also to the participants added by Request Owner manually
Receive a Copy	Participant with this role will not sign the document. They will only receive a copy

3.2.9 Email configuration

The Request Owner can also customise the subject and body of email notification sent to the recipient on the draft page under Email configuration. The message can be selected by changing the mandatory field **Message Template** on the page. As soon as a Message Template is selected, the controls under Email Configuration are updated with the content associated to the Selected Message Template.

3.2.10 Request Submission

After customising and reviewing the draft request, the Owner can submit the request by pressing **Submit** action on top of the draft DocuSign request page. If the request is added successfully then the users will start receiving notifications in the notification panel. In case the request fails, the Owner will be taken to an error page with the description of the error.

The error description must be submitted to System Administrator for resolution.

3.3 Cancel a DocuSign Request

There are use cases in which the Request Owner wants to cancel DocuSign Request which has already been sent. In such cases, the request can be cancelled unless:

1. The DocuSign Request has completed already
2. The DocuSign Request has not been sent
3. The user attempting to Cancel the Request is not the Owner of the Request

Request cancellation action is available under Actions menu of DocuSign Request page.

Upon initiating the Cancel Envelope action, the owner will be prompted to provide the reason of cancellation.

After providing the reason for cancellation, the Owner must press **Continue** in order to proceed with the cancellation of DocuSign request. Upon successful cancellation, the recipients will get notifications automatically about the cancellation.

3.4 Notifications

Creatio users will be notified of all events (Signing, Decline, Completion) on the document. These notifications are sent by DocuSign by email to the recipients and the owner, and Creatio users will get notifications in the notification panel about the events.