

User Manual for Vchasno Integration by MasterCRM



MASTERCRM.

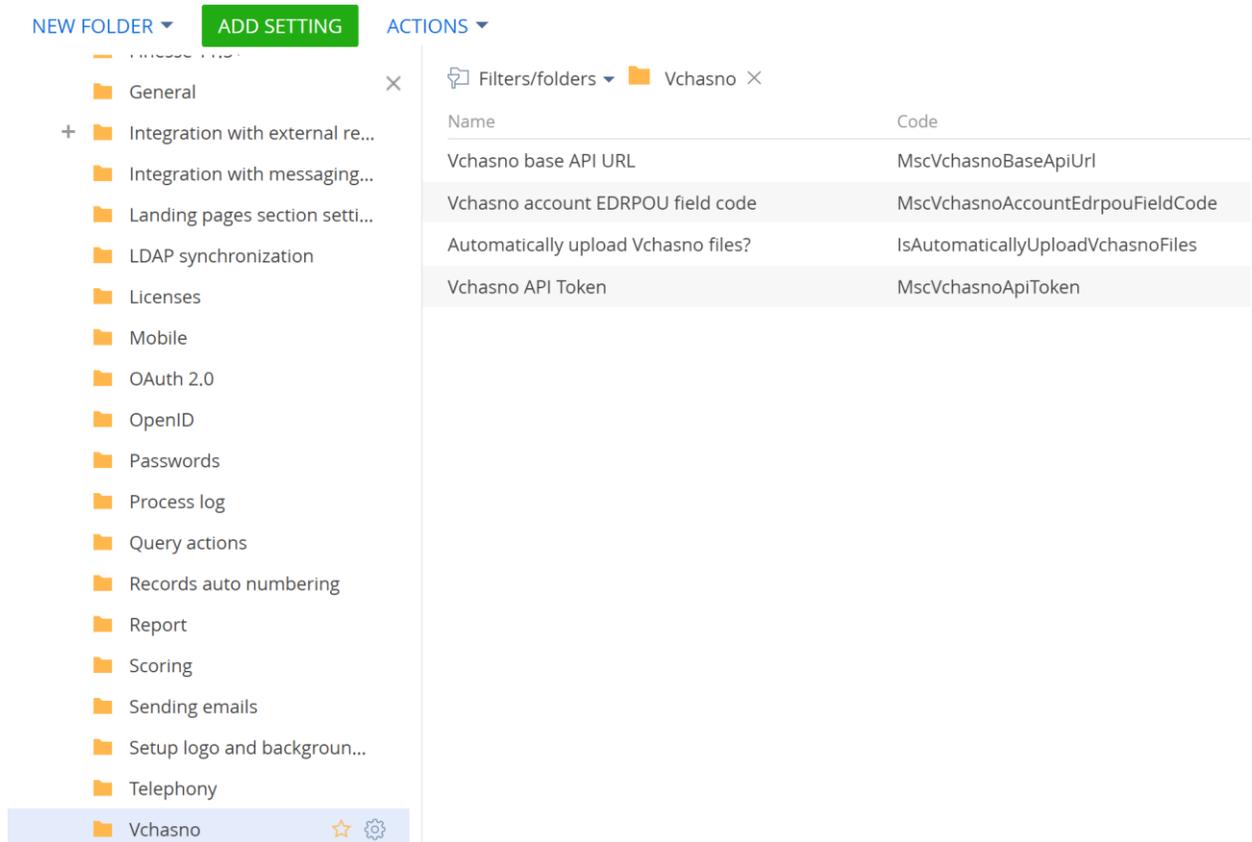
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Setting up the working environment

1. Fill in necessary system settings “Vchasno API Token”, “Vchasno account EDRPOU field code”

System settings



The screenshot shows the system settings interface. On the left, a sidebar lists various settings categories, with 'Vchasno' selected at the bottom. A green 'ADD SETTING' button is visible above the sidebar. The main area displays a table of settings for the 'Vchasno' folder.

Name	Code
Vchasno base API URL	MscVchasnoBaseApiUrl
Vchasno account EDRPOU field code	MscVchasnoAccountEdrpouFieldCode
Automatically upload Vchasno files?	IsAutomaticallyUploadVchasnoFiles
Vchasno API Token	MscVchasnoApiToken

Vchasno API Token (MscVchasnoApiToken) — Token generated in your Vchasno account (<https://help.vchasno.com.ua/token/>).

Vchasno account EDRPOU field code (MscVchasnoAccountEdrpouFieldCode) — Account object column where you store EDRPOU code for your Partners/Customers. If you don't have this field, create it in the configurator.

2. Additional settings: *Automatically upload Vchasno files? (IsAutomaticallyUploadVchasnoFiles)* — true by default. If you don't want to automatically download incoming files sent to you by the counterparts, set to false.

3. Fill in *Vchasno File-Entity Lookup* according to settings in your system for every Entity you want to use Vchasno. It also works with custom objects. For example:

Lookups

NEW **CLOSE** **ACTIONS** ▾ **VIEW** ▾

Vchasno File-Entity Lookup

 **Filters/folders** ▾

Schema name	File Schema Name	File Entity Field Name <small>▲</small>
Account	AccountFile	AccountId
Contact	SysFile	RecordId

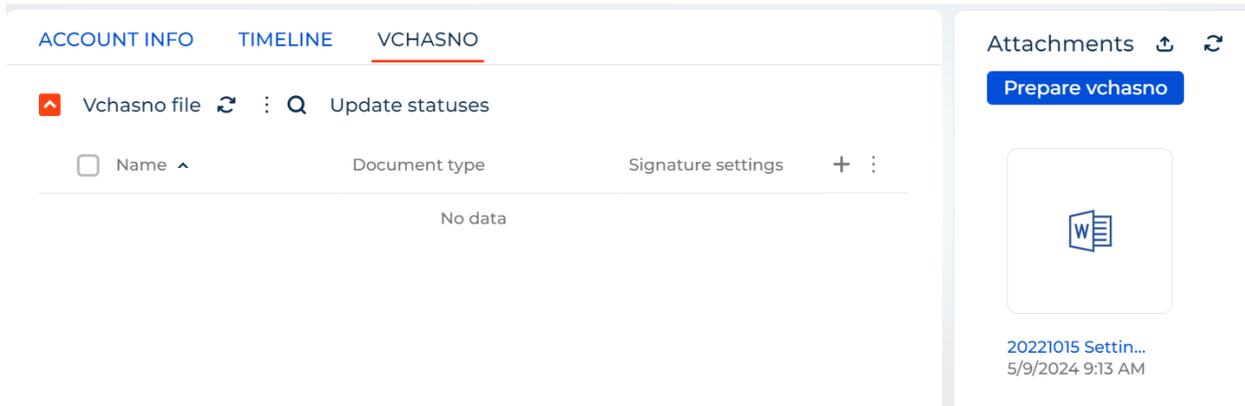
Schema name – name of the object, which we want to use with Vchasno.

File schema name – the name of the file object, related to schema from the previous column.

File entity field name – the name of the field in the file object from the previous column, which connects the File entity with the Entity.

Preparing files for sending

The “Prepare vchasno” button prepares all files from attachments into the “Vchasno file” detail on the “Vchasno” tab. It’s necessary to prepare files, before sending them to Vchasno.



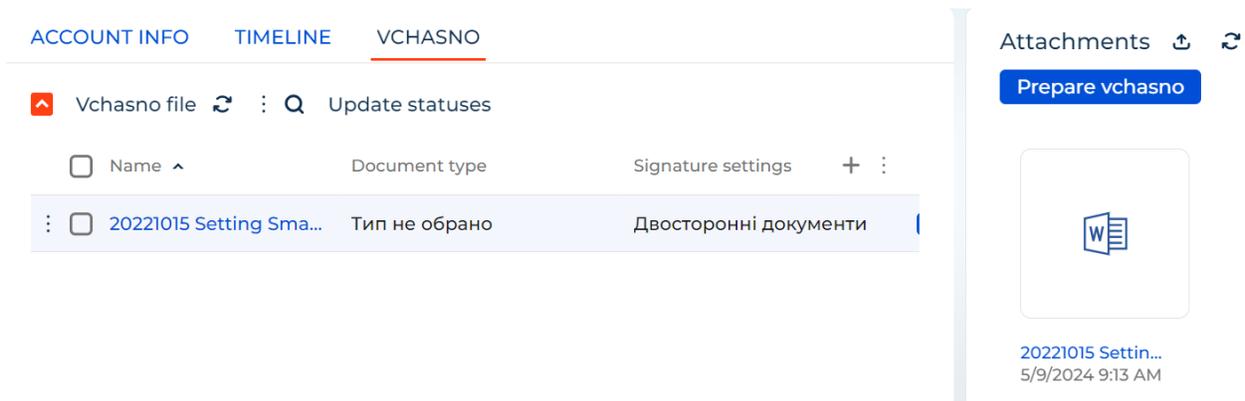
The screenshot shows the Vchasno interface with the 'VCHASNO' tab selected. The main area contains a table with columns for Name, Document type, and Signature settings, but it is currently empty with the text 'No data'. On the right sidebar, under 'Attachments', there is a 'Prepare vchasno' button and a preview of a document icon with the text '20221015 Settin...' and '5/9/2024 9:13 AM'.

After preparing you will see an information message about preparing statuses. If some of the files are prepared with the errors, you can check the system logs.

1 file(s) for Vchasno was prepared

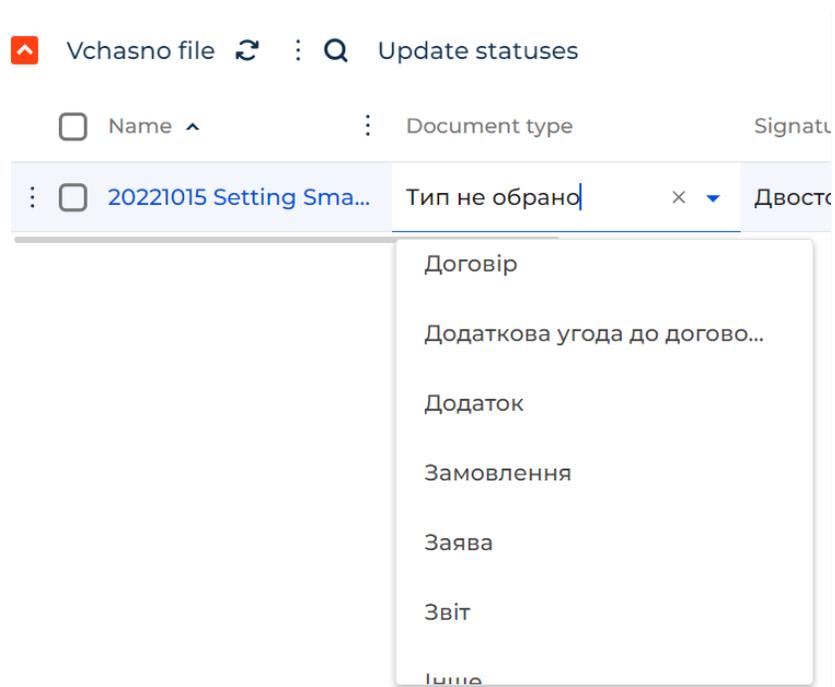
OK

Prepared files will appear in the detail.

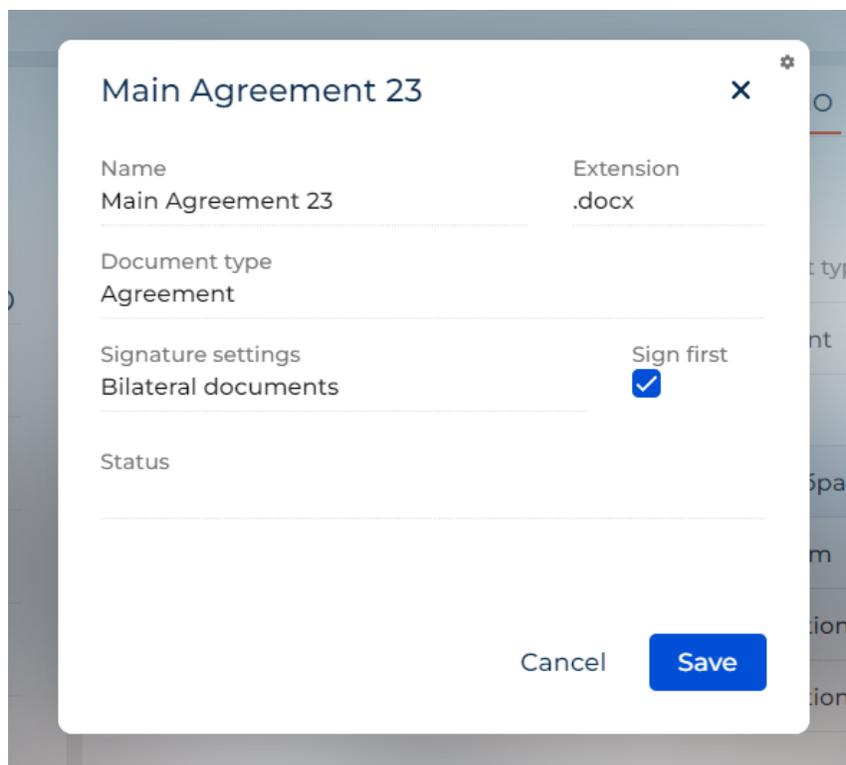


The screenshot shows the Vchasno interface with the 'VCHASNO' tab selected. The main area contains a table with columns for Name, Document type, and Signature settings. A row is highlighted with the following data: Name: '20221015 Setting Sma...', Document type: 'Тип не обрано', and Signature settings: 'Двосторонні документи'. On the right sidebar, under 'Attachments', there is a 'Prepare vchasno' button and a preview of a document icon with the text '20221015 Settin...' and '5/9/2024 9:13 AM'.

In the detail, you can set up different settings for Vchasno, such as Name, Document type, Signature settings, and Who signs first.



You can change these parameters in the mini page as well



When you finish setting up your Vchasno files in detail, you could send them to Vchasno. Just choose the documents you need (you can choose multiple records per time), and click the “Send to vchasno” action. You will see the results of sending in the appearing window.

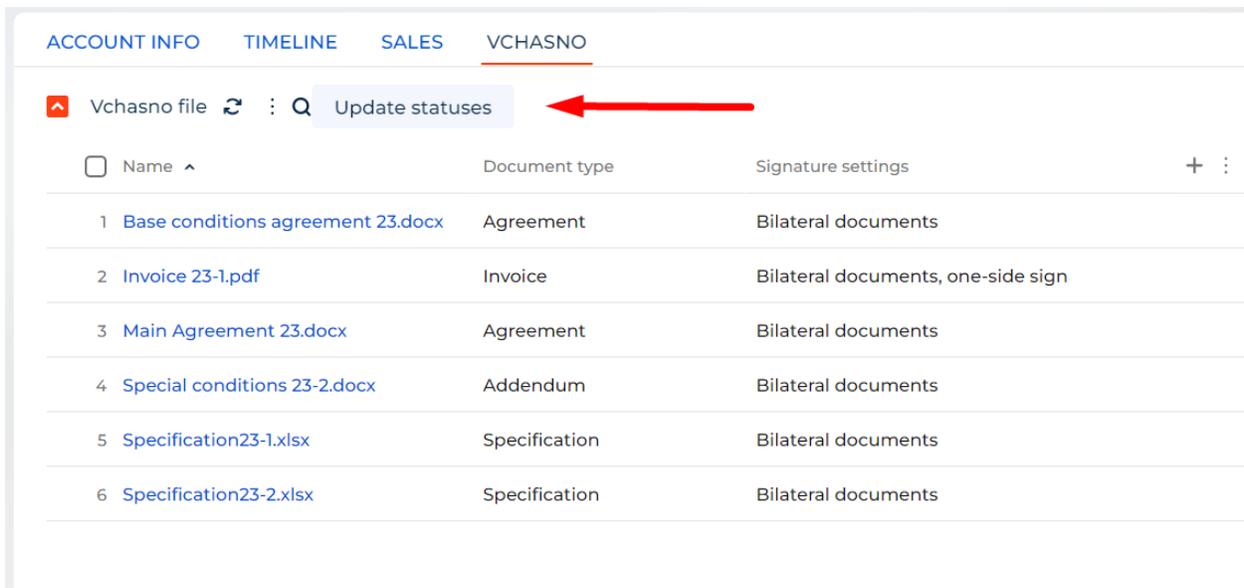
The screenshot shows a web interface with a navigation bar containing 'ACCOUNT INFO', 'TIMELINE', 'SALES', and 'VCHASNO'. Below the navigation bar, there is a header for 'Vchasno file' with icons for refresh, search, and 'Update statuses'. A table lists documents with columns for Name, Document type, Signature settings, Sign first, and Status. Four documents are selected, and a context menu is open over them, showing options like 'Add tag', 'Export to Excel', 'Delete', and 'Send to vchasno'.

Name	Document type	Signature settings	Sign first	Status
1 Base conditions agreement 23.docx	Agreement	Bilateral documents	<input checked="" type="checkbox"/>	
2 Invoice 23-1.pdf	Invoice	Bilateral documents, one-side sign	<input checked="" type="checkbox"/>	Loaded
<input checked="" type="checkbox"/> Main Agreement 23	Agreement	Bilateral documents	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Special conditions 23-2.docx	Addendum	Bilateral documents	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Specification23-1.xlsx	Specification	Bilateral documents	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Specification23-2.xlsx	Specification	Bilateral documents	<input checked="" type="checkbox"/>	

4 selected Specification | Add tag | Export to Excel | Delete | Send to vchasno

Update statuses

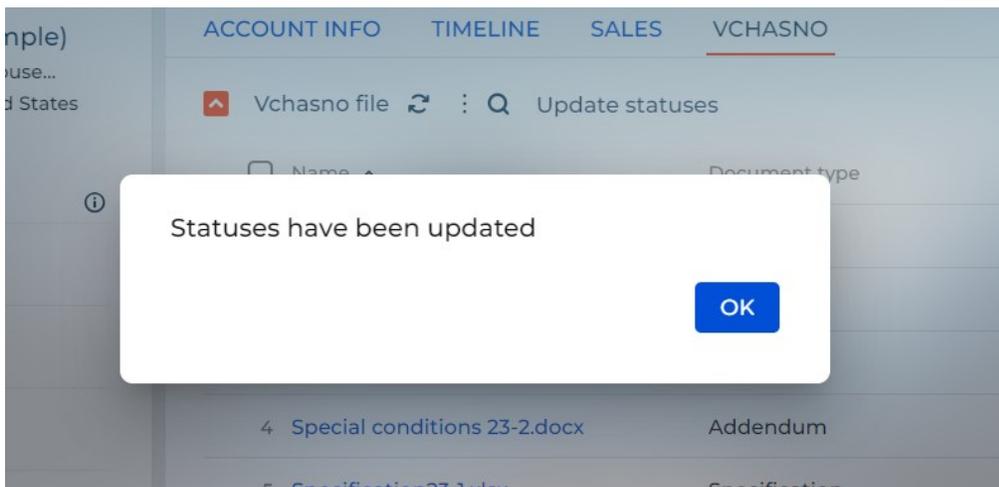
There is an automatic status updating, which runs every 3 hours by default. If you need to update particular file details manually, just click the “Update statuses” button.



The screenshot shows the VCHASNO interface with the 'Update statuses' button highlighted by a red arrow. The interface includes a navigation bar with 'ACCOUNT INFO', 'TIMELINE', 'SALES', and 'VCHASNO'. Below the navigation bar, there is a header for 'Vchasno file' with a refresh icon and a search icon, followed by the 'Update statuses' button. A table below lists several documents with their names, document types, and signature settings.

Name	Document type	Signature settings
1 Base conditions agreement 23.docx	Agreement	Bilateral documents
2 Invoice 23-1.pdf	Invoice	Bilateral documents, one-side sign
3 Main Agreement 23.docx	Agreement	Bilateral documents
4 Special conditions 23-2.docx	Addendum	Bilateral documents
5 Specification23-1.xlsx	Specification	Bilateral documents
6 Specification23-2.xlsx	Specification	Bilateral documents

After a few seconds, you'll see confirmation, and file statuses will be updated.



The screenshot shows the VCHASNO interface with a confirmation dialog box overlaid. The dialog box contains the text 'Statuses have been updated' and an 'OK' button. The background interface is dimmed, showing the same navigation bar and table as the previous screenshot.

Receiving the final document

If in the result of the status update any status from Vchasno will be changed (for example if in Vchasno the document was signed), a zip archive with the new version of the document, and signatures, will be automatically downloaded into Attachments detail on the record page, with the prefix "Vchasno_".

The screenshot displays a software interface with two main panels. The left panel, titled 'VCHASNO', contains a table of documents. The right panel, titled 'Attachments', shows a grid of document thumbnails with their respective names and timestamps. A red arrow points from the 'Main Agreement 23.docx' entry in the table to the corresponding thumbnail in the attachments panel.

Name	Document type
1 Base conditions agreement 23.docx	Agreement
2 Invoice 23-1.pdf	Invoice
3 Main Agreement 23.docx	Agreement
4 Special conditions 23-2.docx	Addendum
5 Specification23-1.xlsx	Specification
6 Specification23-2.xlsx	Specification

Attachments panel details:

- Vchasno_Main ... 5/10/2024 9:21 AM
- Main Agreeeme... 4/16/2024 12:59 PM
- Specification23... 3/12/2024 7:55 PM
- Invoice 23-1.pdf 3/12/2024 7:47 PM

If any additional signature will be added in Vchasno, the file in the attachments will be updated with new data.

Receive incoming document

When you receive an incoming document in Vchasno, Creatio will automatically create a Task, with an attachment. In this attachment, there is a zip archive with documents and electronic signatures from Vchasno. The created task also will be connected to an account by the EDRPOU field.

The screenshot displays the Creatio user interface for a task titled "Vchasno_Estimation document". The interface is divided into several sections:

- Left Sidebar:** A navigation menu with icons for Home, Dashboards, Calendar, Tasks, Feed, Leads, Accounts, Contacts, Opportunities, Orders, and Contracts.
- Task Header:** Shows the task title "Vchasno_Estimation document" and an "Add tag" button.
- Details Panel:** Contains fields for Priority (Medium), Category, To do, Location, and Show in calendar. It also lists Executors (Owner: Andrew Baker, Reporter: Supervisor) and Reminders (Remind owner, Remind reporter).
- Main Task Area:** Displays the Subject (Vchasno_Estimation document), Start (5/1/2024 4:46 PM), Due (5/1/2024 4:46 PM), and Status (Not started). It includes a Participants table and an Info section.
- Participants Table:**

Participant	Role	Invite response
1 Andrew Baker	Owner	
2 Supervisor	Participant	
- Attachments Panel:** Shows a single attachment titled "Vchasno_Estim..." with a timestamp of "5/1/2024 4:46 PM".