

Setting up Formstack Documents for Creatio

Introduction

Creatio is a No-Code Platform offering significant integration capability with other systems. Formstack's suite of products is a robust toolset to manage the initialization of data collection, generation of forms from that data (and external data), and solicitation for digital signature. Together, they offer a powerful synergy that complements each other significantly.

Formstack offers three primary products that can be integrated with Creatio using our series of Marketplace connectors:

- Forms
- Documents
- Sign

In this document, you'll find step-by-step instructions that will be needed to configure your Creatio instance to generate Formstack Documents using Creatio data.

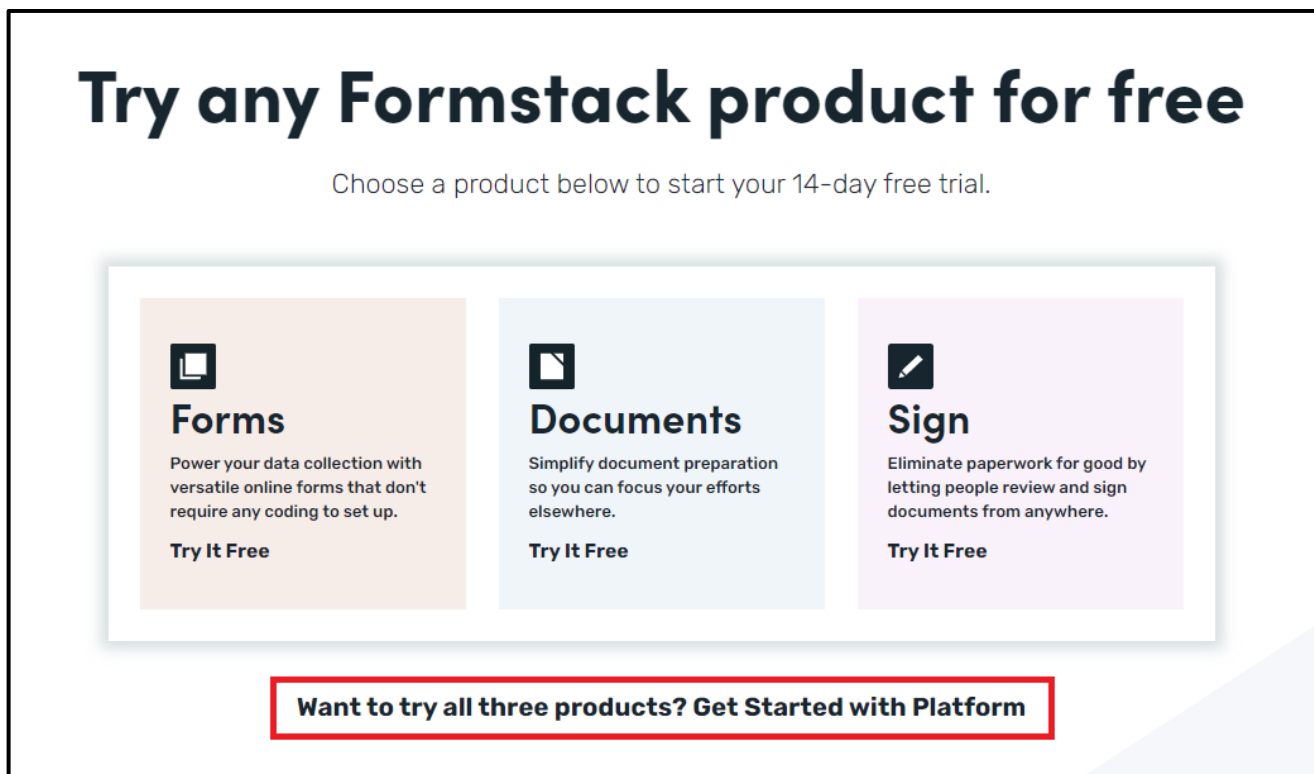
We will use a templated approach in this guide. However, connecting any Formstack Document with any Creatio section will follow a similar process within each respective user interface (Classic UI vs. Freedom UI).

Setup Requirements

Before getting started, there are a couple of minor pre-requisites required to properly use the Formstack Documents Connector for Creatio:

- 1) You must have an active [Formstack Documents subscription](#). You may use [this link](#) to obtain a free 14-day trial of Formstack Documents.

For this particular connector, we recommend that you choose the bottom option of “Want to try all three products? Get Started with Platform,” as the templates used in this guide also use the Formstack Sign product.



The screenshot displays a promotional banner for Formstack products. At the top, it reads "Try any Formstack product for free" in large, bold, black text. Below this, a smaller line of text says "Choose a product below to start your 14-day free trial." The main content area features three colored boxes: an orange box for "Forms" (with a document icon), a light blue box for "Documents" (with a document icon), and a light purple box for "Sign" (with a pen icon). Each box contains a brief description of the product's benefits and a "Try It Free" button. At the bottom of the banner, a red-bordered box contains the text "Want to try all three products? Get Started with Platform".

Additionally, while Formstack is highly configurable and can be configured to receive any Creatio section data to generate documents, we suggest using a template we’ve created as a “starting place.” To obtain these templates, please email formstack@ss-adv.com with the email address used to register for your Formstack 14-day free trial.

If you do not have an active trial or subscription with Formstack, we cannot share the standard templates with your Formstack Documents account. In this guide, sharing that template is paramount to creating an understanding and competency for using this connector effectively.

Before Getting Started

We've attempted to make connecting Creatio and Formstack Documents as easy as possible. Please note that while Creatio is a No-Code Platform, its user interface evolved in February 2022 and continues to evolve and roll out additional functionality.

Due to that fact, we will be referencing the two interfaces throughout this document.

- **Classic UI:** Creatio's latest layout as of version 7.18.5 (released in 12/07/2021). As of version 8.0.8, users will notice a distinctive difference between how screens appear for any section other than Accounts, Contacts, and Addresses.
- **Freedom UI:** Creatio's modern UI, comprised of composable architecture that enables a more user-friendly, drag-and-drop interface that has been enriched with no-code tools to help bring user's ideas to life. The Freedom UI was introduced in version 8.0.0 (released 02/08/2022), and continues to be the emphasis of Creatio's development team to uplift the capabilities that ultimately empower users to accomplish more with less reliance on code.

It is well known amongst the Creatio community that the Freedom UI strives to eliminate the need to code where practical. When referencing the Classic UI, we've also chosen to adhere to the path of "no code" and have not provided any guidance for implementing related features that require code within Creatio.

For more complex integrations of Formstack Documents with Creatio (i.e., generating complex documents using Creatio data), please contact us at formstack@ss-adv.com. We will gladly help assess the effort required to accomplish the desired outcome.

We try to offer this service as a compliment for customers where Software Selection Advisors, LLC is the assigned Formstack partner; however, should any engagement (for our customers and others) require paid participation on our part, we will clarify that upfront.

Setup Instructions

Similar to our [Formstack Forms Connector for Creatio](#), we will be using the Leads section of Creatio to generate a sample Non-Disclosure Agreement (“NDA”) between the Creatio user’s company and the lead. We will also use buttons provided by our [Formstack Documents Connector for Creatio](#) Marketplace product to test sending documents from an Account.

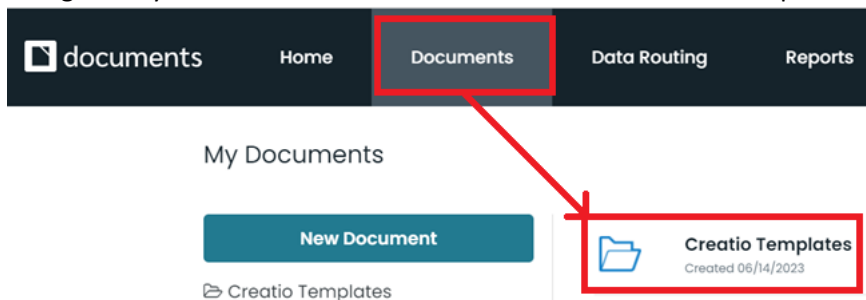
It is assumed that obtaining a signed NDA is the first step of the customer onboarding process in this example that may be executed from either the Lead or Account section.

DISCLOSURE: This Non-Disclosure Agreement document was taken from Formstack’s library template and customized to work seamlessly in this example. It is not intended to be a legal document to be adopted by any customer, partner, or other party. It is intended solely as an example.

Follow the below instructions to configure our “NDA” document from Formstack. **The below process should take less than 30 minutes to complete if the “Setup Requirements” have been fulfilled.**

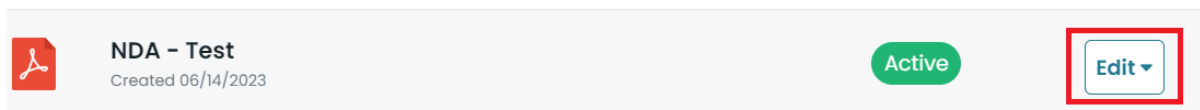
The person performing the tasks within Creatio must have the proper System Administrator role and access to the sections covered in the steps that follow.

1. Configure Formstack Documents
 - a. Log into your Formstack Documents account.
 - b. Navigate to your “Documents” and left-click on the “Creatio Templates” folder.



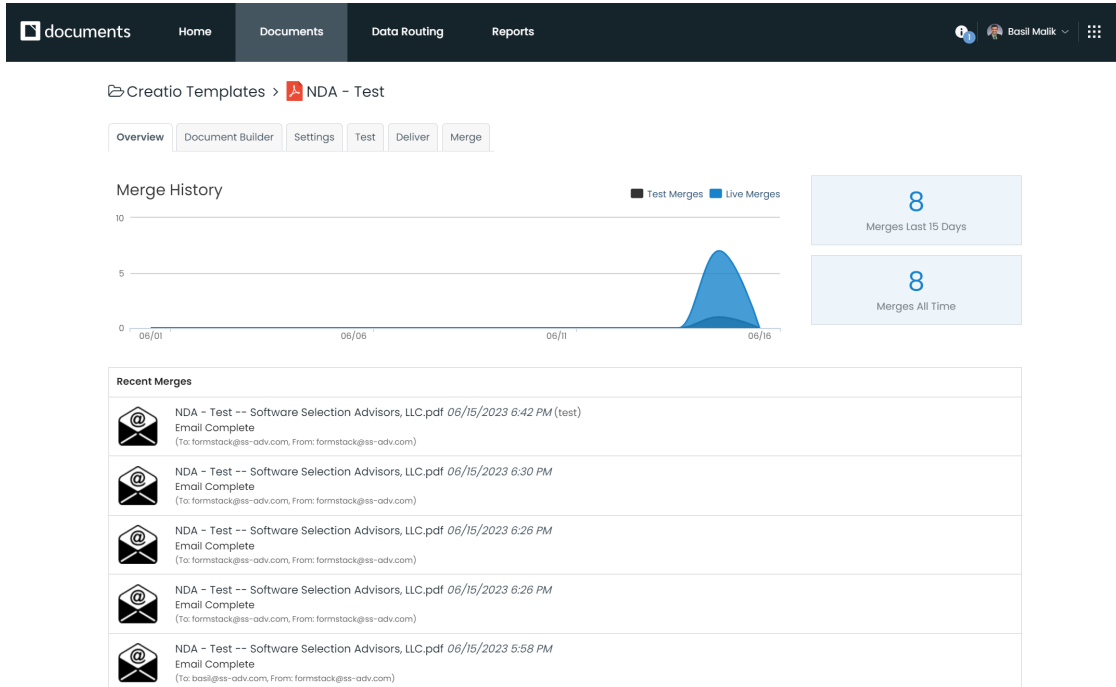
Note: If you don’t see this directory, you have not completed the “Setup Requirements” section, and cannot proceed with the guide.

- c. Hover over the “NDA – Test” document, and click the “Edit” button that appears as you hover over it.

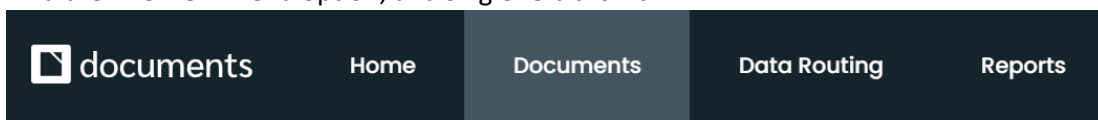


Note: As you hover over the “Edit” button, it will expand into additional options. Simply left-click on “Edit,” and ignore the remaining options.

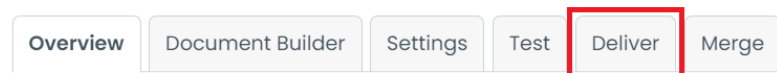
- d. You will now be in the “NDA – Test” document’s “Overview” section. This area will provide a utilization history of document generation activity and list recent merge requests (both from within Formstack and programmatic means).



- e. There is little to do within the template itself; however, explore the following interface options at your leisure:
- i. Document Builder: allows you to modify the document template, add merge fields and other Formstack Documents capabilities, and otherwise bring the document to life.
 - ii. Settings: modify attributes relative to the document template.
 - iii. Test: run manual tests of the document by manually filling out the standard inputs of each merge field used on the document.
- f. Find the “Deliver” menu option, and single-left-click it:



Creatio Templates > NDA - Test



- g. On this template, only an email notification has been configured to deliver the generated document from Formstack.

Left-click the “Edit” button for the email template.

📁 Creatio Templates > 📄 NDA - Test


Overview Document Builder Settings Test **Deliver** Merge

 **Email** [Edit](#) [Copy](#) | [Delete](#)

You've been sent a test generation of a Non-Disclosure Agreement (To: {*SourContactEmail*}, From: *formstack@ss-adv.com*)

- h. Within the email, you will have several options to change: where the email goes (“Send Email To”), which email inbox the email comes from (“Send Email From”), the subject line of the email (“Subject”), and the contents of the email (“Message”).

For the sake of simplicity, we’ll focus on the first two options: “Send Email To” and “Send Email From.”

 **Send via E-Mail**

Send Email To*

Merge Field Specific E-Mail

ourContactEmail ▼

Send Email From*

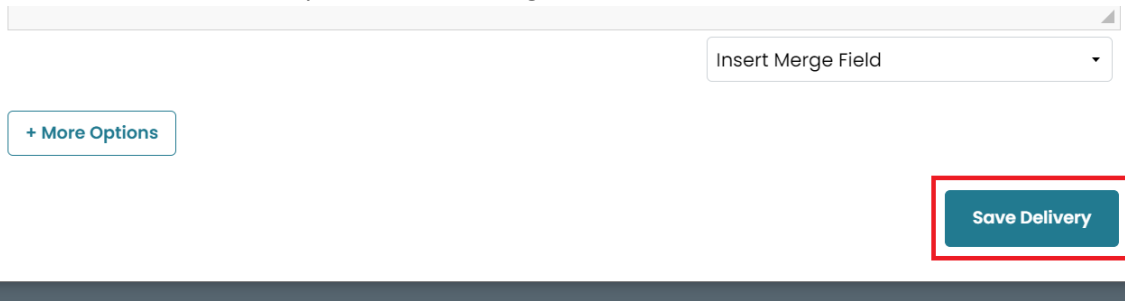
Merge Field Specific E-Mail

formstack@ss-adv.com

“Send Email To”: we’ve opted to send this from the “ourContactEmail” merge field as it will be sent to the Creatio user requesting a view of the test document.

“Sent Email From”: we’ve selected a generic email that the test email should originate. Designate any email address and proceed to the next step.

- i. Left-click on "Save Delivery" at the bottom right of the modal window.



- j. Left-click on the "Merge" tab.



- k. In the "Custom Integration" section, make note of the "Merge URL" string.

Custom Integration

If you are building your own integration, you'll want to send data to your document via the Merge URL below. You can send data via a webhook (HTTP POST name/value pairs), using the fieldnames in your document (ie first_name=John&last_name=Smith&phone=312-555-3029).



- l. Open a text editor of your preference (we use Notepad++), and copy the two variables from the below. The red box is the "Document Id" and the green box is the "Url" value that we'll need later:

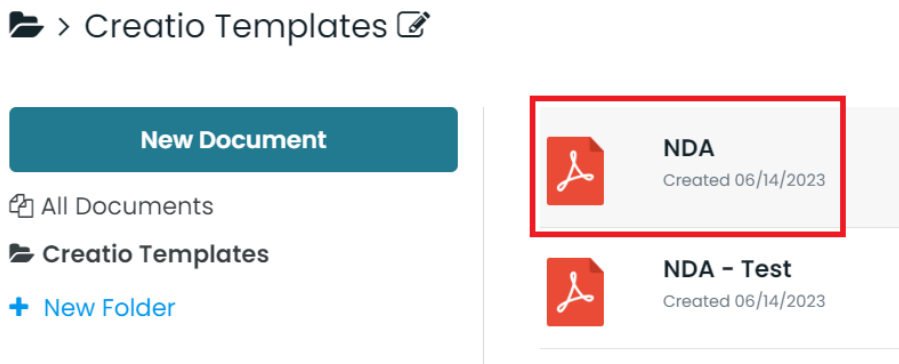
Merge URL:



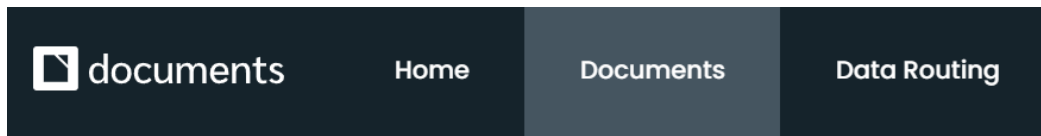
Merge URL:



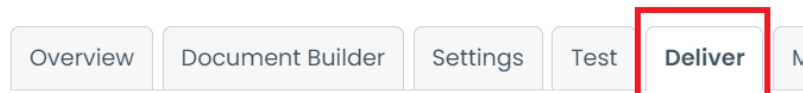
m. Repeat steps 1.c. through 1.l., instead selecting the “NDA” document to start the processes.



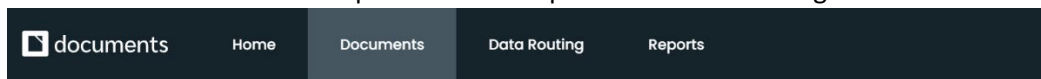
- i. This document will illustrate the power of Formstack Documents and its ability to merge Creatio data into a document that also requires the signature of two parties: the contact listed on the Lead, and the user that makes the request to create the document.
- ii. Left-click on the “Deliver” tab of the “NDA” Formstack document record.



Creatio Templates > NDA



iii. Note that this document template has two separate deliveries configured.



Creatio Templates > NDA



Repeat steps 1.g. and 1.h. above for the “Email” delivery option to define the recipient and sender of the email.

- iv. Click the “Edit” button on the “Formstack Sign” delivery method.

Formstack Sign Edit Copy Delete

Sender: basil@ss-adv.com
Send to: {theirContactEmail}

- v. Make any amendments within the modal window to alter any of the following: the subject line of the email (“Subject”), the customer’s signatory information (“Signee”), and your company’s signatory (“Signee 2”).

Send to Formstack Sign X

Subject:
Please sign this mutually binding NDA (not a real document)

Sender:
basil@ss-adv.com

Signee : Signer CC
 theirContactName theirContactEmail
 Name * Email *

Signee 2: Signer CC
 ourContactName ourContactEmail
 Name * Email *

[Add Another Participant](#)

[+ More Options](#)

[Save Delivery](#)

Leave the options as-is if you would like for the Formstack Sign emails to be delivered to the “Email” field from the Creatio Lead record and the email of the Creatio user who requests the Formstack Document generation.

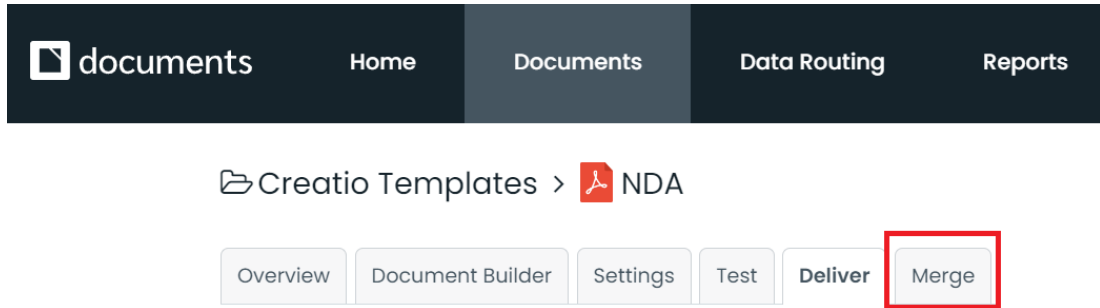
Note: the “Sender” email value is not editable as it’s attached to the email address of your Formstack Sign account.

- vi. Click “Save Delivery”

[+ More Options](#)

[Save Delivery](#)

- vii. Click the “Merge” tab of the “NDA” document.



- viii. In the “Custom Integration” section, make note of the “Merge URL” string.

Custom Integration

If you are building your own integration, you'll want to send data to your document via the Merge URL below. You can send data via a webhook (HTTP POST name/value pairs), using the fieldnames in your document (ie first_name=John&last_name=Smith&phone=312-555-3029).

Merge URL:

<https://www.webmerge.me/merge/1042439/zee8q9>

- ix. Open a text editor of your preference (we use Notepad++), and copy the two variables from the below. The red box is the “Document Id” and the green box is the “Url” value that we'll need later:

Merge URL:

<https://www.webmerge.me/merge/1042439/zee8q9>

Merge URL:

<https://www.webmerge.me/merge/1042439/zee8q9>

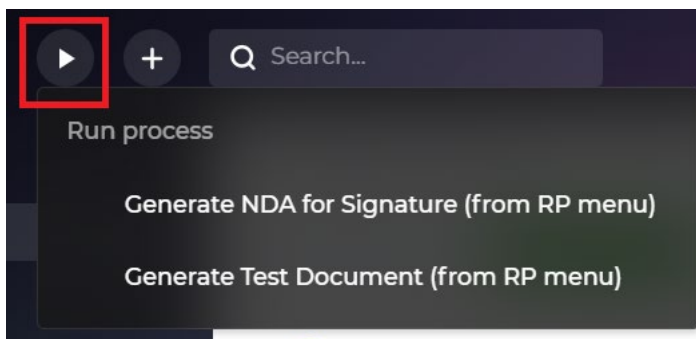
2. Configure Creatio for Formstack Documents

- a. Install our [“Formstack Documents Connector for Creatio”](#) Connector from the Marketplace. The connector’s primary contents consist of one Web Services record with two methods and four Business Processes. The Web Services record consists of the following two methods:
 - i. **Document Merge:** this method will push Creatio data into the “NDA” Formstack Documents template, simulating a real-world example of document generation and delivery for electronic signature.
 - ii. **Test Document Merge:** this method will ush Creatio data into the “NDA – Test” Formstack Documents template, allowing users to confirm that the generated document looks correct before sending the Creatio record through the above “Document Merge” method.

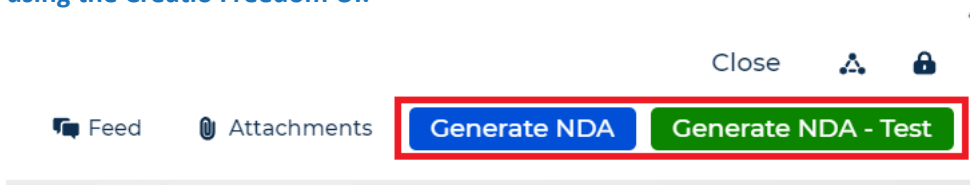
The business processes that have been pre-configured to work with both of the Formstack Documents templates mentioned throughout step 1 and its sub-steps.

- i. **Generate Test Document (from RP menu):** allows a user to use the “Run Process” menu to execute the process, which requires a user define a lead record to generate an “NDA – Test” Formstack Document template.
- ii. **Generate NDA for Signature (from RP menu):** allows a user to use the “Run Process” menu to execute the process, which requires a user define a lead record to generate an “NDA” Formstack Document template.
- iii. **Generate Test Document (from button):** allows a user to run a process from a button where the system passes the unique record ID for an account. That unique ID gets passed to the business process to generate an “NDA – Test” Formstack Document template.
- iv. **Generate NDA for Signature (from button):** allows a user to run a process from a button where the system passes the unique record ID for an account. That unique ID gets passed to the business process to generate an “NDA” Formstack Document template.

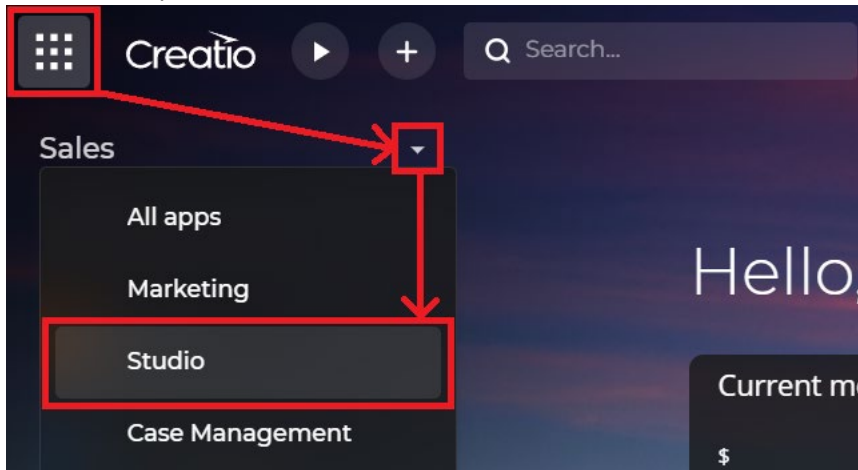
Items 2.a.i. and 2.a.ii. are both intended to be run from the omnipresent Creatio menu option “Run Process.”



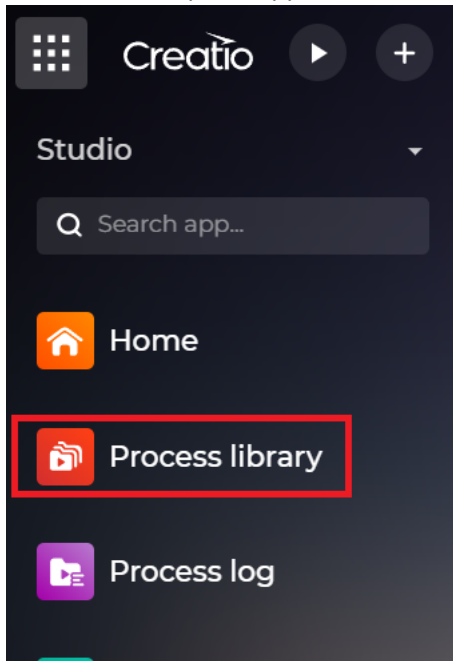
Business Process items 2.a.iii. and 2.a.iv. are intended to be run using a Freedom UI button from any Account record’s edit page. [Refer to Step 4 of this guide on how to place Creatio buttons onscreen using the Creatio Freedom UI.](#)



- b. No changes must be made to the Web Services record or its methods.
- c. From the Creatio menu, select the 9-dot main navigation icon, and locate the “Studio” workplace from the dropdown menu:

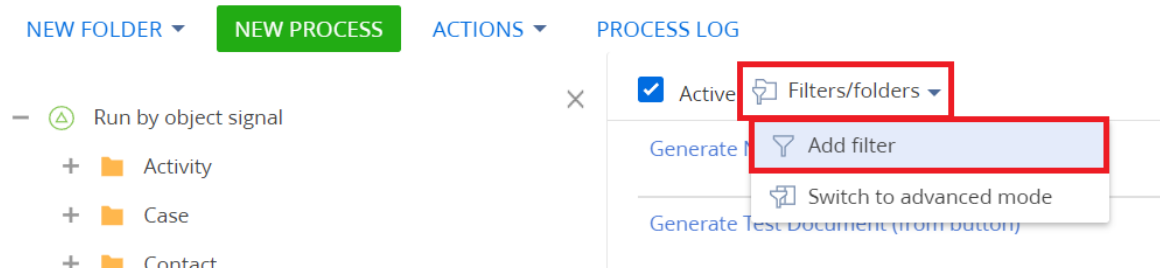


- d. From the Workplace applications list, locate the “Process Library” and left-click on that app:

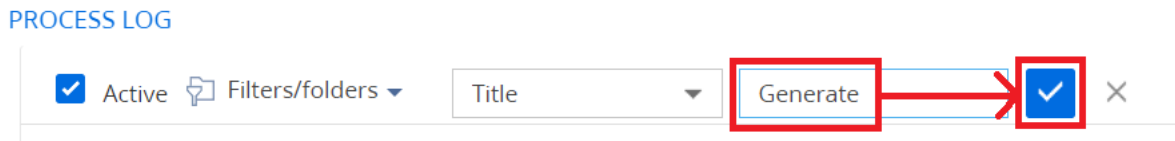


- e. Single left-click on the “Filters/folders” button, select the “Add Filter” button from the dropdown with another left-click:

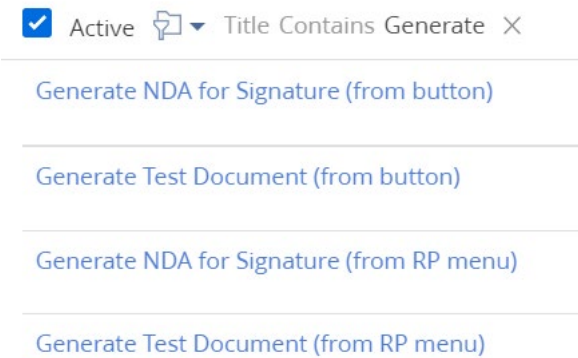
Process library



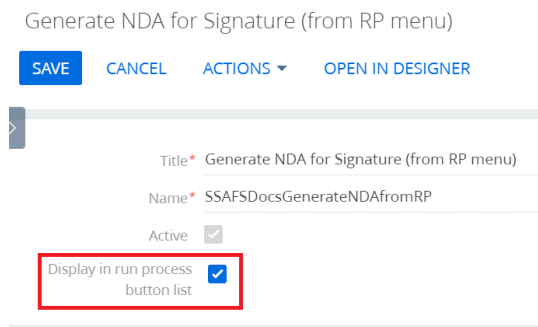
- f. In the filter, the default “Filter by” option will be “Title” – type the word “Generate” in the text box and left-click the blue checkmark icon to apply the filter:



- g. Once applied, you should see the four business processes mentioned in step 2.a.



Note: for the two business processes that end in, “(from RP menu)”, open each business process and set the “Display in run process button list” checkbox to a checked (aka “true”):

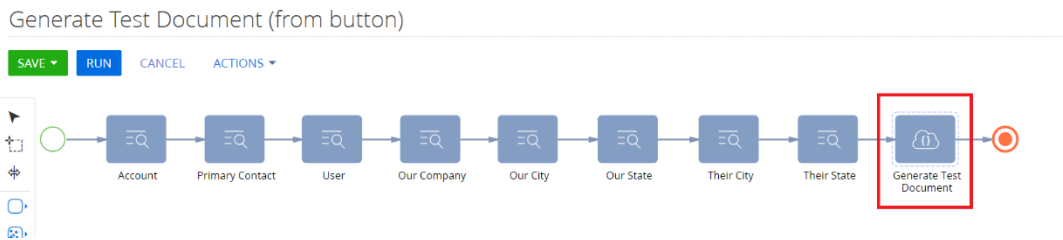


- h. From step 1.i., you should have copied two sets of two values to your clipboard. Using this guide’s example, those value pairs are:
 - i. NDA – Test: “1042547” and “ph2j9m”
 - ii. NDA: “1042439” and “zee8q9”
- i. For the business processes beginning with “Generate Test...”, we will modify both records using the following steps:
 - i. Left-click on the name of one of the “Generate Test...” business processes (the blue text):

[Generate Test Document \(from button\)](#)

This will open the Business Process builder in Creatio.

- ii. Left-click on the “Generate Test Document” option from the process elements:



- iii. From the “Request parameters” items, locate the “Document Id” and “URL” fields.

T Document Id*

→ Select value

T URL*

→ Select value

- iv. Replace the “Document Id” with the numeric value from our “NDA – Test” value pairs and the “URL” with the alphanumeric value:

T Document Id*

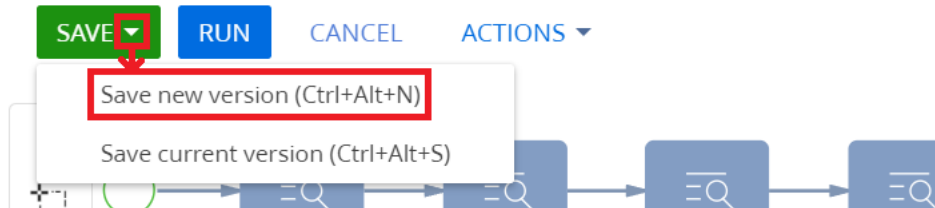
→ 1042547

T URL*

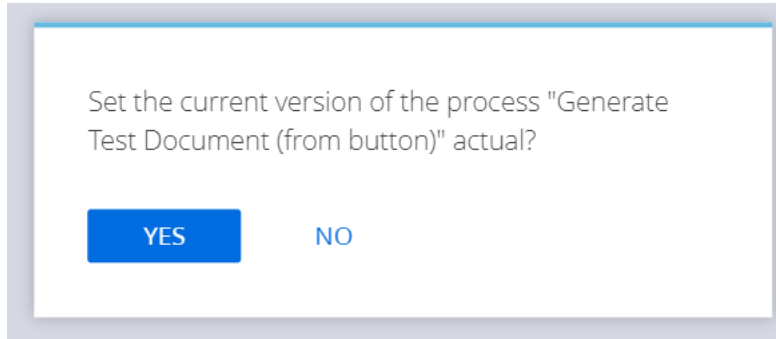
→ ph2j9m

- v. Left-click the downward pointing arrow on the “Save” button, and select the “Save new version (Ctrl+Alt+N)” button. This will save a new version of this business process, ensuring that you always have the original business process to re-use or reference at any point:

Generate Test Document (from button)

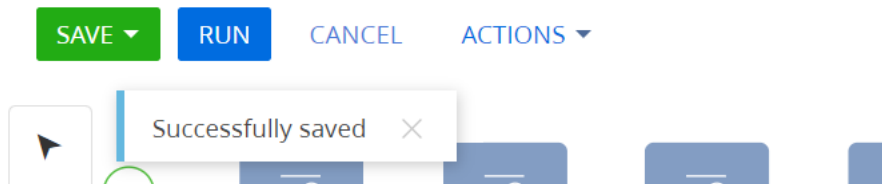


- vi. When prompted with the below, click the “Yes” button:



- vii. Close the browser tab once you receive confirmation that the process was saved successfully:

Generate Test Document (from button)



- viii. Repeat all steps from 2.i. through 2.vii. for the other business process. In our example, that would be the business process titled “Generate Test Document (from RP menu).”

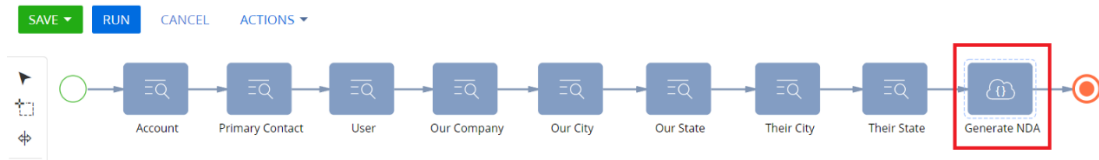
- j. Returning to the list of business processes filtered by the Title of “Generate,” locate the business processes beginning with “Generate NDA...” We will modify both records using the following steps:
 - i. Left-click on the name of one of the “Generate NDA...” business processes (the blue text):

[Generate NDA for Signature \(from button\)](#)

This will open the Business Process builder in Creatio.

- ii. Left-click on the “Generate NDA” option from the process elements:

[Generate NDA for Signature \(from button\)](#)



- iii. From the “Request parameters” items, locate the “Document Id” and “URL” fields.

T Document Id*

→ Select value

T URL*

→ Select value

- iv. Replace the “Document Id” with the numeric value from our “NDA” value pairs and the “URL” with the alphanumeric value:

T Document Id*

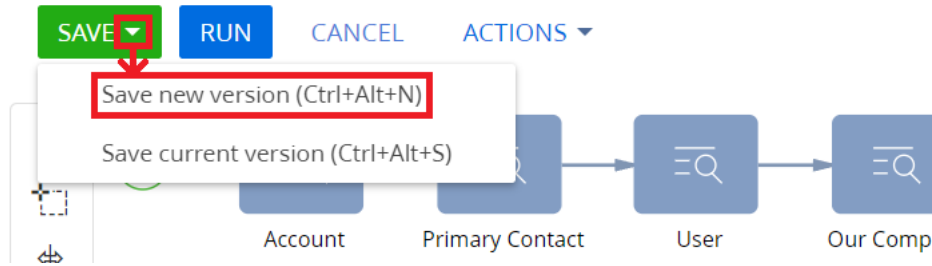
→ 1042439

T URL*

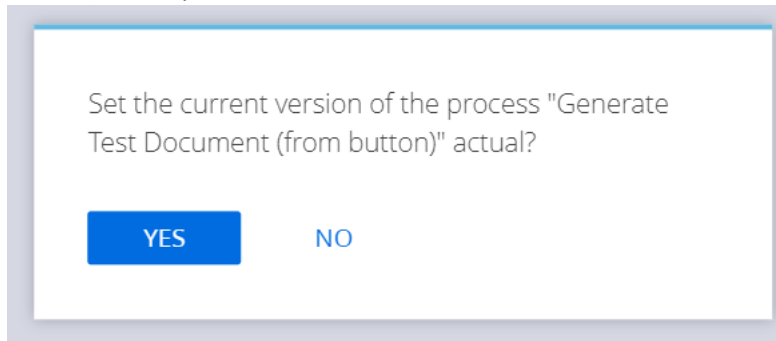
→ zee8q9

- v. Left-click the downward pointing arrow on the “Save” button, and select the “Save new version (Ctrl+Alt+N)” button. This will save a new version of this business process, ensuring that you always have the original business process to re-use or reference at any point:

Generate NDA for Signature (from button)

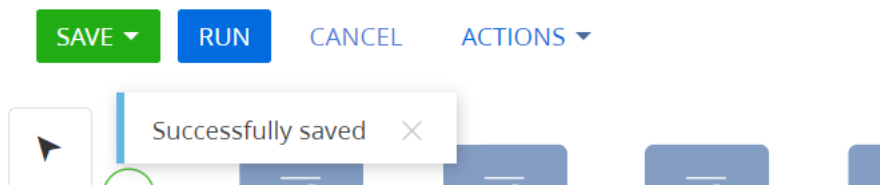


- vi. Similar to when we were prompted with the below for the “Generate Test Document (from button)” example, click the “Yes” button:



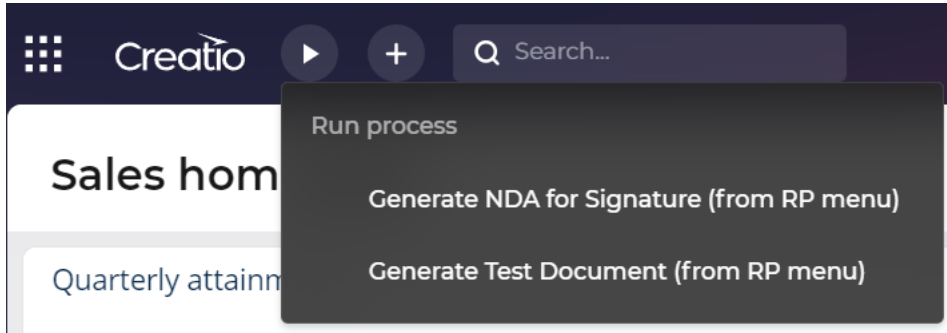
- vii. Close the browser tab once you receive confirmation that the process was saved successfully:

Generate Test Document (from button)

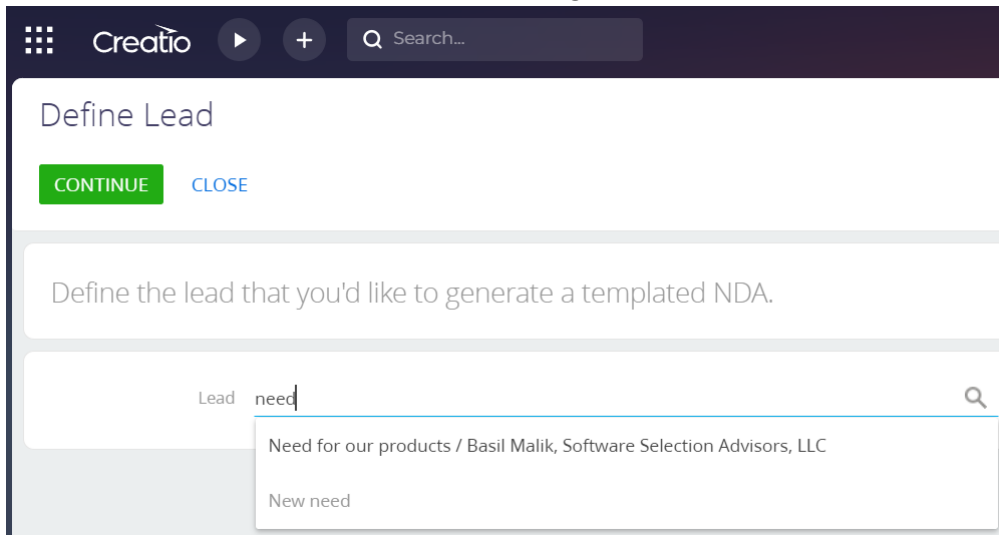


- k. Repeat all steps from 2.j.i. through 2.j.vii. for the other business process. In our example, that would be the business process titled “Generate NDA for Signature (from RP menu).”

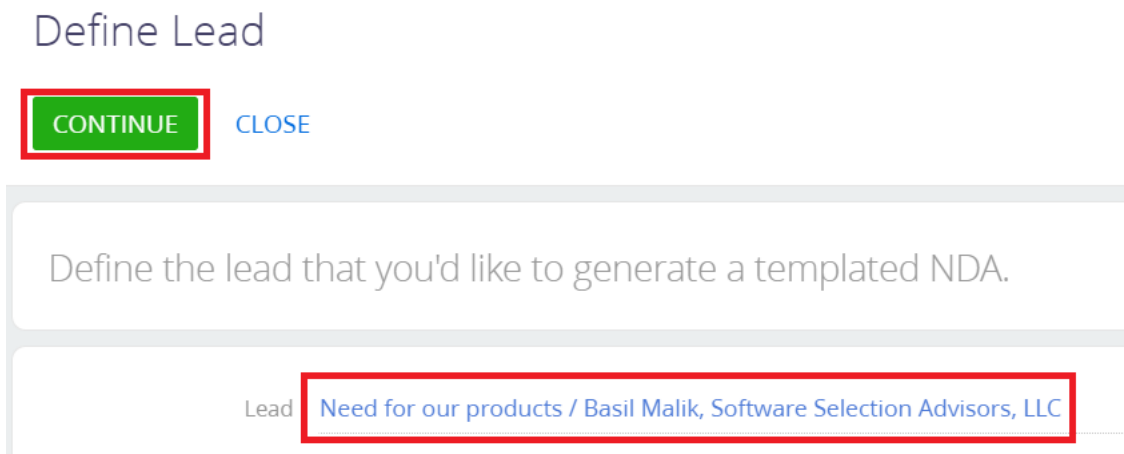
3. Test that your buttons and business processes work.
 - a. Testing the business processes from the “Run Process” menu option requires that you left-click “Run Process” first, then select either of the two options below:



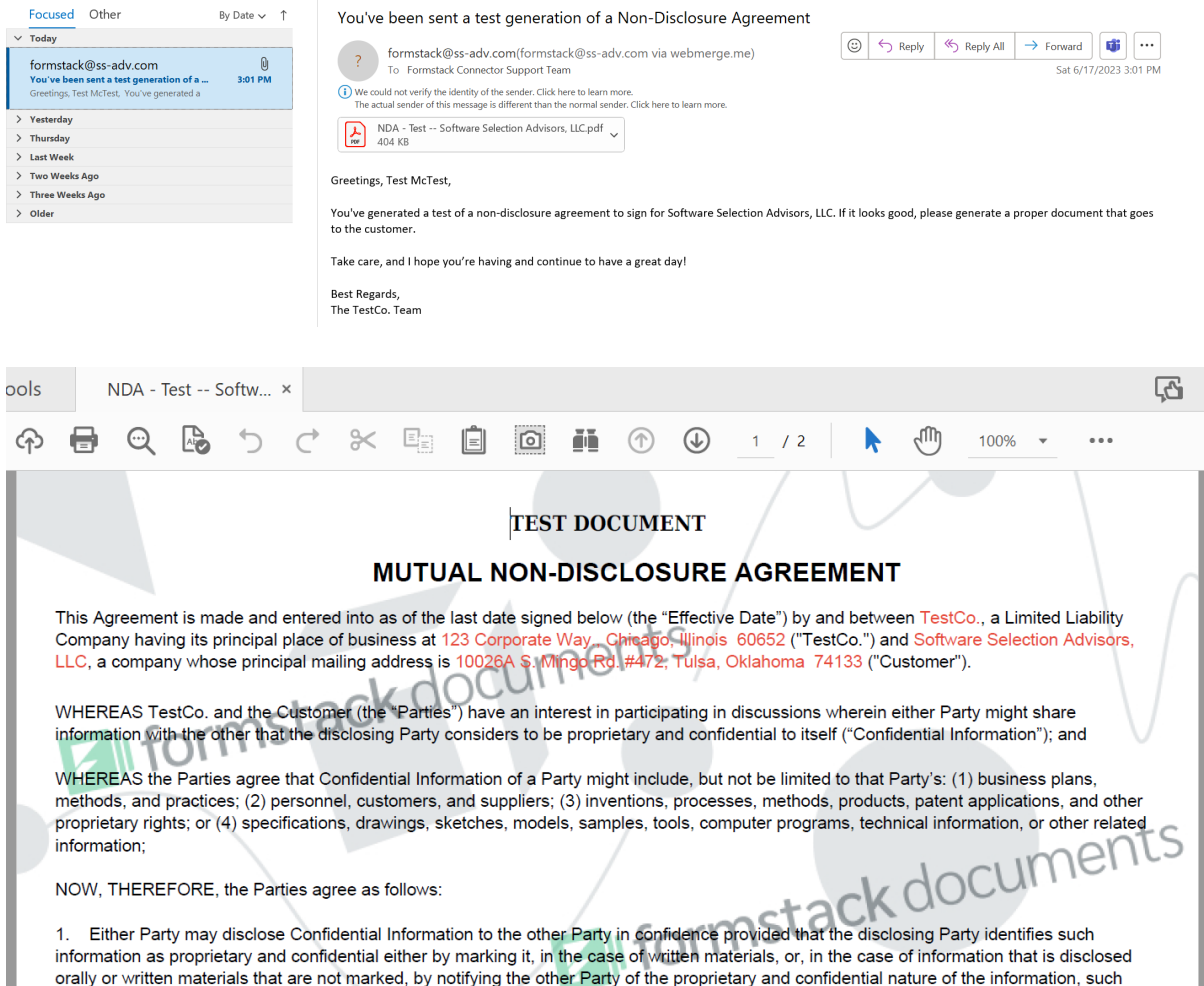
- b. From the screen that appears, use the “Lead” field to identify which record you wish to generate either the “NDA” or “NDA – Test” document. We began typing the word “need” in the lookup to locate the desired lead to use in the document generation:



- c. Once the value in the “Lead” field turns blue, left click the “Continue” button:



- d. If all steps 1 and 2 (and their sub-steps) have been followed, you should receive an email from Formstack Documents with the document generation result (which will have watermarks placed to indicate it's a test document):



Focused Other By Date ↑

Today

formstack@ss-adv.com
You've been sent a test generation of a ... 3:01 PM
Greetings, Test McTest. You've generated a

Yesterday

Thursday

Last Week

Two Weeks Ago

Three Weeks Ago

Older

You've been sent a test generation of a Non-Disclosure Agreement

formstack@ss-adv.com(formstack@ss-adv.com via webmerge.me)
To Formstack Connector Support Team

We could not verify the identity of the sender. Click here to learn more.
The actual sender of this message is different than the normal sender. Click here to learn more.

NDA - Test -- Software Selection Advisors, LLC.pdf
404 KB

Greetings, Test McTest,

You've generated a test of a non-disclosure agreement to sign for Software Selection Advisors, LLC. If it looks good, please generate a proper document that goes to the customer.

Take care, and I hope you're having and continue to have a great day!

Best Regards,
The TestCo. Team

tools NDA - Test -- Softw... x

TEST DOCUMENT

MUTUAL NON-DISCLOSURE AGREEMENT

This Agreement is made and entered into as of the last date signed below (the "Effective Date") by and between **TestCo.**, a Limited Liability Company having its principal place of business at **123 Corporate Way, Chicago, Illinois 60652** ("TestCo.") and **Software Selection Advisors, LLC**, a company whose principal mailing address is **10026A S. Mingo Rd., #472, Tulsa, Oklahoma 74133** ("Customer").

WHEREAS TestCo. and the Customer (the "Parties") have an interest in participating in discussions wherein either Party might share information with the other that the disclosing Party considers to be proprietary and confidential to itself ("Confidential Information"); and

WHEREAS the Parties agree that Confidential Information of a Party might include, but not be limited to that Party's: (1) business plans, methods, and practices; (2) personnel, customers, and suppliers; (3) inventions, processes, methods, products, patent applications, and other proprietary rights; or (4) specifications, drawings, sketches, models, samples, tools, computer programs, technical information, or other related information;

NOW, THEREFORE, the Parties agree as follows:

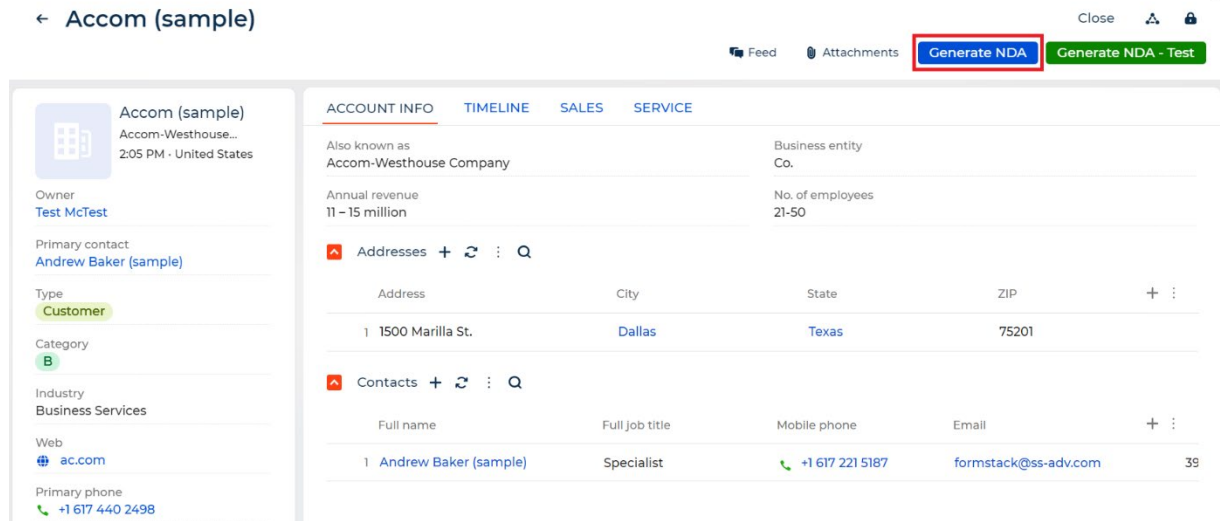
1. Either Party may disclose Confidential Information to the other Party in confidence provided that the disclosing Party identifies such information as proprietary and confidential either by marking it, in the case of written materials, or, in the case of information that is disclosed orally or written materials that are not marked, by notifying the other Party of the proprietary and confidential nature of the information, such

- e. Repeat the above steps 3.a. through 3.d. for the other business process to ensure it functions properly.

f. To test the buttons placed on the Account page, navigate to any Account record in Creatio.

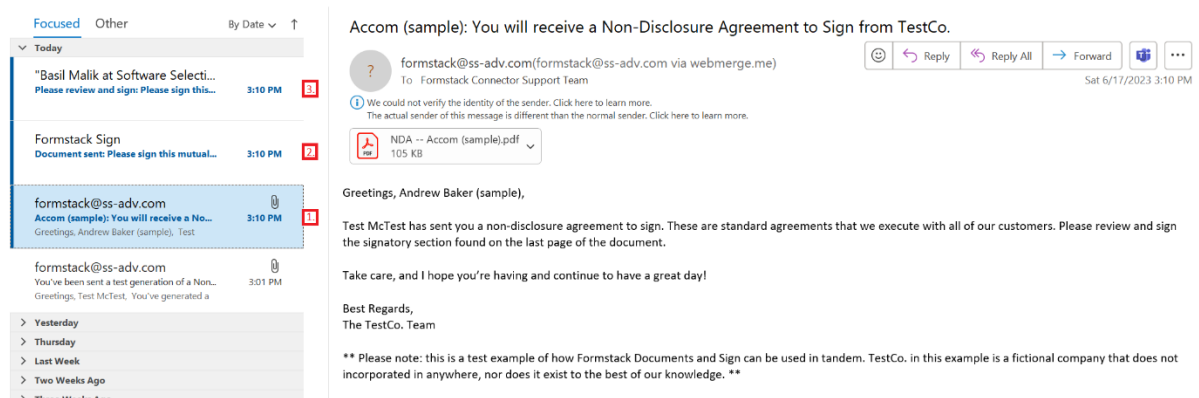
Refer to [Step 4](#) of this guide on how to place Creatio buttons onscreen using the Creatio Freedom UI.

g. Click on the “Generate NDA” button, and note that it won’t appear as if anything has happened.





However, in this example, emails will get delivered in the proper order: the customer’s primary contact record (“Andrew Baker (sample)” from the above screenshot) will have an email delivered to the email value listed (“formstack@ss-adv.com” in the above screenshot).

- 1) The email goes to the “Send Email To” value from step 1.h.
- 2) The first signee receives an email based on the email value defined for “Signee” in step 1.m.v.
- 3) The second signee receives an email based on the email value defined for “Signee 2” in step 1.m.v.



h. Repeat step 3.g. to test the “Generate NDA – Test” button:

← **Accom (sample)** Close  

Feed Attachments Generate NDA Generate NDA - Test

Accom (sample)
Accom-Westhouse...
2:05 PM · United States

Owner
Test McTest

Primary contact
Andrew Baker (sample)

Type
Customer

Category
B

Industry
Business Services

Web
ac.com

Primary phone
+1 617 440 2498

ACCOUNT INFO | **TIMELINE** | **SALES** | **SERVICE**

Also known as
Accom-Westhouse Company

Business entity
Co.

Annual revenue
11 - 15 million

No. of employees
21-50

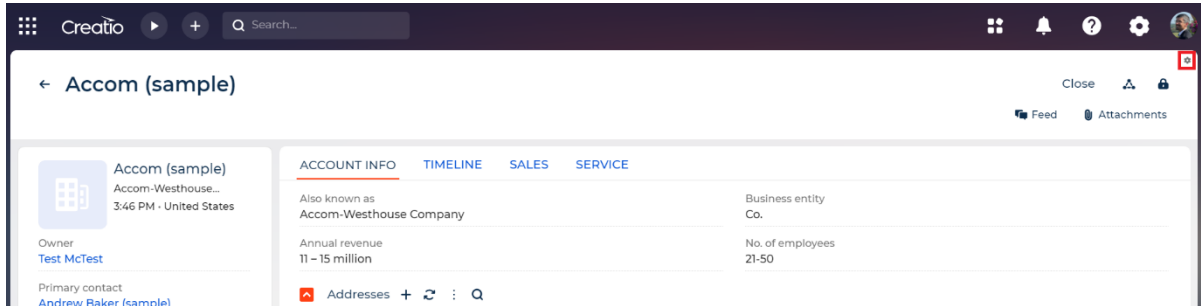
Addresses + ↻ ⋮ 🔍

Address	City	State	ZIP	+ ⋮
1 1500 Marilla St.	Dallas	Texas	75201	

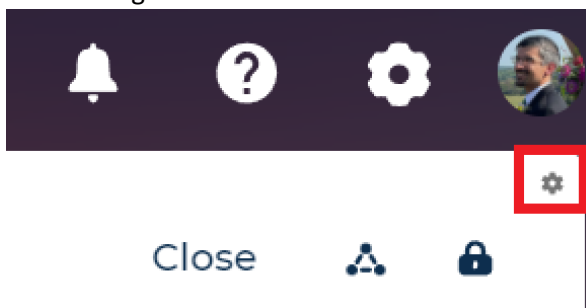
Contacts + ↻ ⋮ 🔍

Full name	Full job title	Mobile phone	Email	+ ⋮
1 Andrew Baker (sample)	Specialist	+1 617 221 5187	formstack@ss-adv.com	39

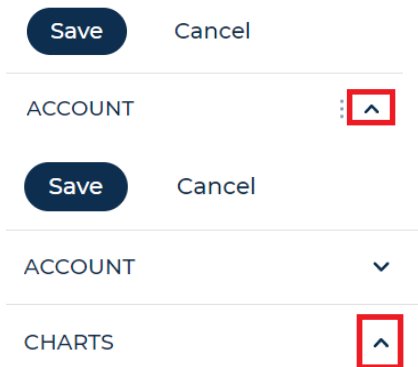
4. Placing Buttons Onscreen Using the Creatio Freedom UI: follow the below steps to place two buttons on the Accounts section that allow you to generate the two different Formstack Documents using Creatio Account record data.
 - a. Navigate to any Account record (i.e., "Accom (sample)")
 - b. In the top-right corner of the screen (just below the user profile image), click the small gear icon to open the Freedom UI page designer:



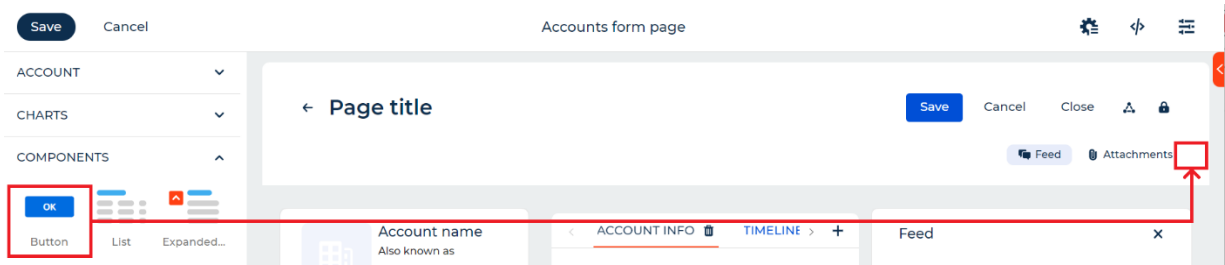
Closer image of the icon is below:



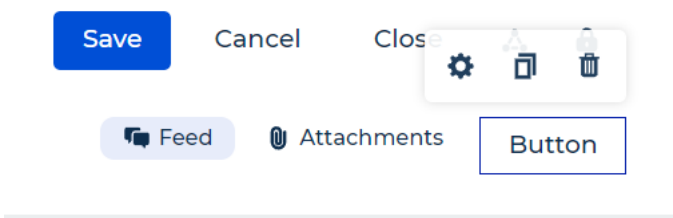
- c. Minimize the "Account" and "Charts" section by clicking the "^" symbol for each section:



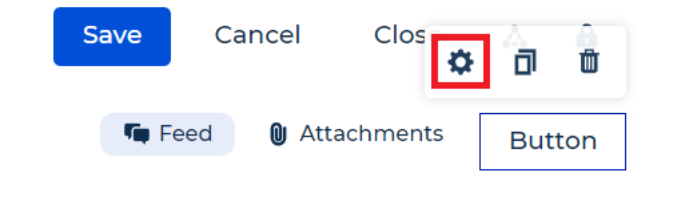
- d. From the “Components” section, left-click and hold the left mouse button down on the “Button” option and drag it to the right of the “Attachments” button:



The result should look like the below screenshot:



- e. Left-click the gear icon (“Settings”) that’s floating above the “Button”



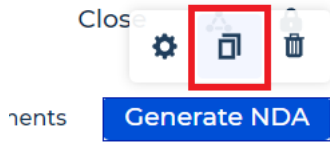
- f. Set the following values for the button. As you begin setting values for the below, other fields will display that align to the below order of the fields:
 - i. Title: "Generate NDA"
 - ii. Style: "Primary"
 - iii. Size: "M"
 - iv. Action: "Run process"
 - v. Which process to run?: "Generate NDA for Signature (from button)"
 - vi. How to run the process?: "For the selected page"
 - vii. Process parameter where the record is passed: "AccountID"

Below is the final output for the button:

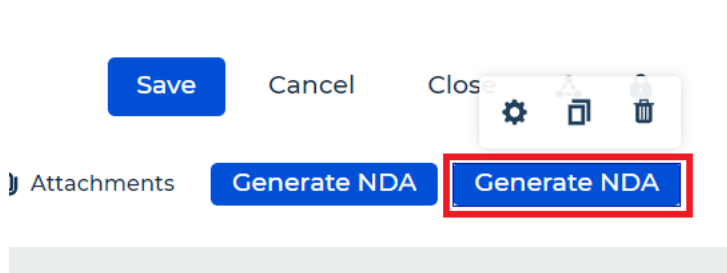
The screenshot displays a configuration panel for a button. On the left, a preview shows a blue button labeled 'Generate NDA' with a 'Close' button and icons for settings, refresh, and delete. The main configuration area is titled 'Generate NDA' and is organized into sections:

- GENERAL**
 - Title *: Generate NDA
 - Style: Primary
 - Size: S M L XL (M is selected)
- ACTION**
 - Action: Run process
 - Which process to run?: Generate NDA for Signature (from ...) (with a link icon)
 - How to run the process?: For the selected page
 - Process parameter where the record is passed: AccountID
- MENU ITEMS** (+)

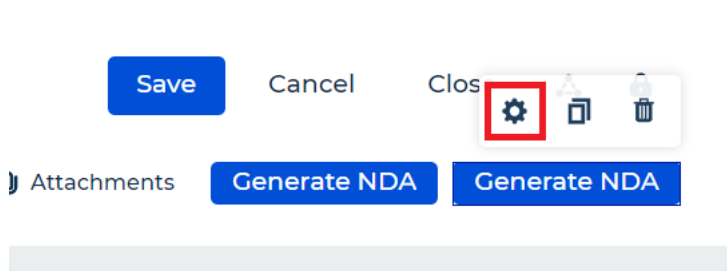
- g. Click the “Copy” icon to clone the “Generate NDA” button:



- h. Single-left click on the “Generate NDA” button’s clone:



- i. Left-click the gear icon (“Settings”) that’s floating above the “Generate NDA” clone:



- j. Set the following values for the button. As you begin setting values for the below, other fields will display that align to the below order of the fields:
 - i. Title: "Generate NDA - Test"
 - ii. Style: "Focus"
 - iii. Size: "M"
 - iv. Action: "Run process"
 - v. Which process to run?: "Generate Test Document (from button)"
 - vi. How to run the process?: "For the selected page"
 - vii. Process parameter where the record is passed: "AccountID"

- k. Below is the final output for the button:

>
Generate NDA - Test

GENERAL ^

Title *
 Generate NDA - Test ✖

Style
 Focus

Size

S M L XL

ACTION ^

Action
 Run process

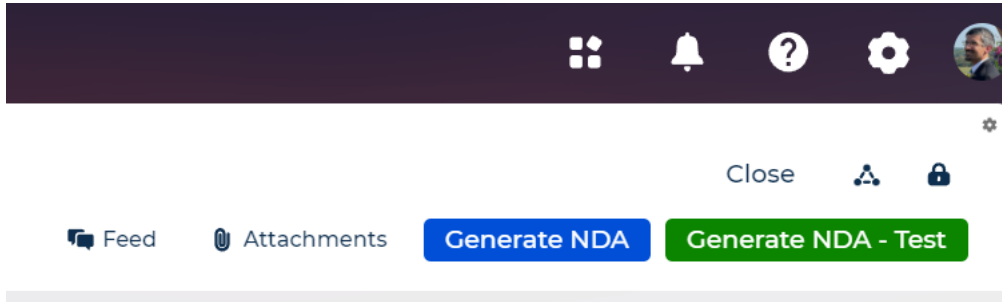
Which process to run?
 Generate Test Document (from but... ↗

How to run the process?
 For the selected page

Process parameter where the record is passed
 AccountID

MENU ITEMS + ^

- l. If all of the above settings match your Creatio instance's settings, left-click the "Save" button in the top-left corner of the screen to commit the changes.
- m. Return to browser tab where your Account record from step 4.b. is located and refresh your browser tab.
- n. Upon the tab reloading, you'll notice the two buttons in the top-right of the screen are now there for any Account record:



Conclusion and Future Support

Presuming the above steps were followed correctly, you should now be able to generate two different Formstack Documents from your Creatio instance – regardless of if you’re using the Classic UI or the Freedom UI.

Note that the Freedom UI enables users to enable seamless interaction, whereas the Classic UI (in these examples) requires a couple of additional clicks/steps.

For more examples or to obtain help using Formstack Documents to generate additional documents relevant to your business, don’t hesitate to contact us at formstack@ss-adv.com.