Adobe Document Cloud eSign Services

for Salesforce Version 17
Installation and Customization Guide

Last Updated: August 28, 2015

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Overview

Adobe Document Cloud eSign services (formerly EchoSign) for Salesforce works from any browser and mobile device. The app is available from the AppExchange and supports the following Salesforce Editions:

- Professional
- Enterprise
- Unlimited
- Developer
- Ultimate

Reap immediate benefits for your document and signature workflows.

- Save time and money by eliminating snail mail, overnighting, and faxing
- Send contracts for e-signature or approval directly from Salesforce, access real-time contract history, and view saved contracts from any object
- Track deals in real-time across your organization and also get updates with Chatter when agreements are viewed, signed, cancelled, or declined
- eSign in over 20 languages and support fax-back service in 50+ locales worldwide
- Merge Salesforce data into documents before sending and map signer data back to Salesforce objects – automatically and seamlessly
- Create reusable Agreement Templates for sending options and enable one-click 'Send for Signature' buttons to send custom agreements from any Salesforce object
- Native integrations with Conga Composer, Apttus, Selectica, Drawloop, Zuora, Emptoris, and more
- All eSign services objects and pages in Salesforce are translated to all 16 languages supported by Salesforce.com so your Salesforce users can send and track all their agreements in their native language

Install and Configure eSign Services for Salesforce v17

New Customer Testing and Installing for the First Time—For those who are new to Adobe Document Cloud eSign services for Salesforce, you can try installing and start sending test agreements within minutes. View the Quick Start Guide tutorial on how to get up and running.

Existing Customers Upgrading from Previous Versions—We strongly encourage customers to upgrade to the latest version of the package to take advantage of the latest features and also get the best support. Click here to view the upgrade guide, which will assist existing eSign services customers who need to upgrade to eSign services for Salesforce v17 from a prior version.

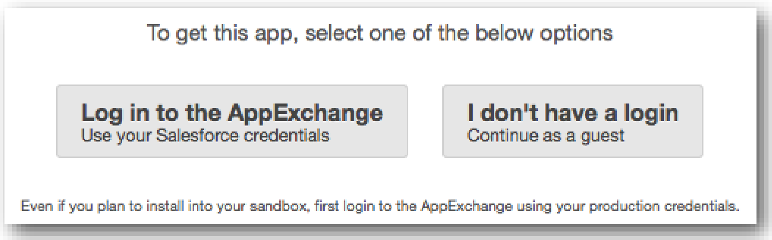
Note: eSign services for Salesforce requires that you have cookies enabled on your browser. Please also check that third-party cookies are enabled as that is required in some browsers to fully access the application pages.

Installing eSign Services

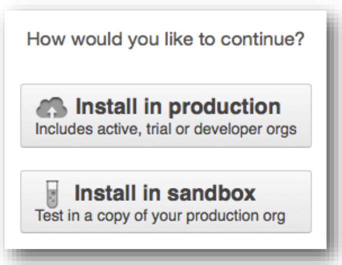
You must have a Salesforce account to install Adobe Document Cloud eSign services. If you do not, you can create one during the installation process as described below:

1. Click here to access the Adobe Document Cloud eSign services application package on the Salesforce AppExchange.
2. Click the **Get It Now** button.

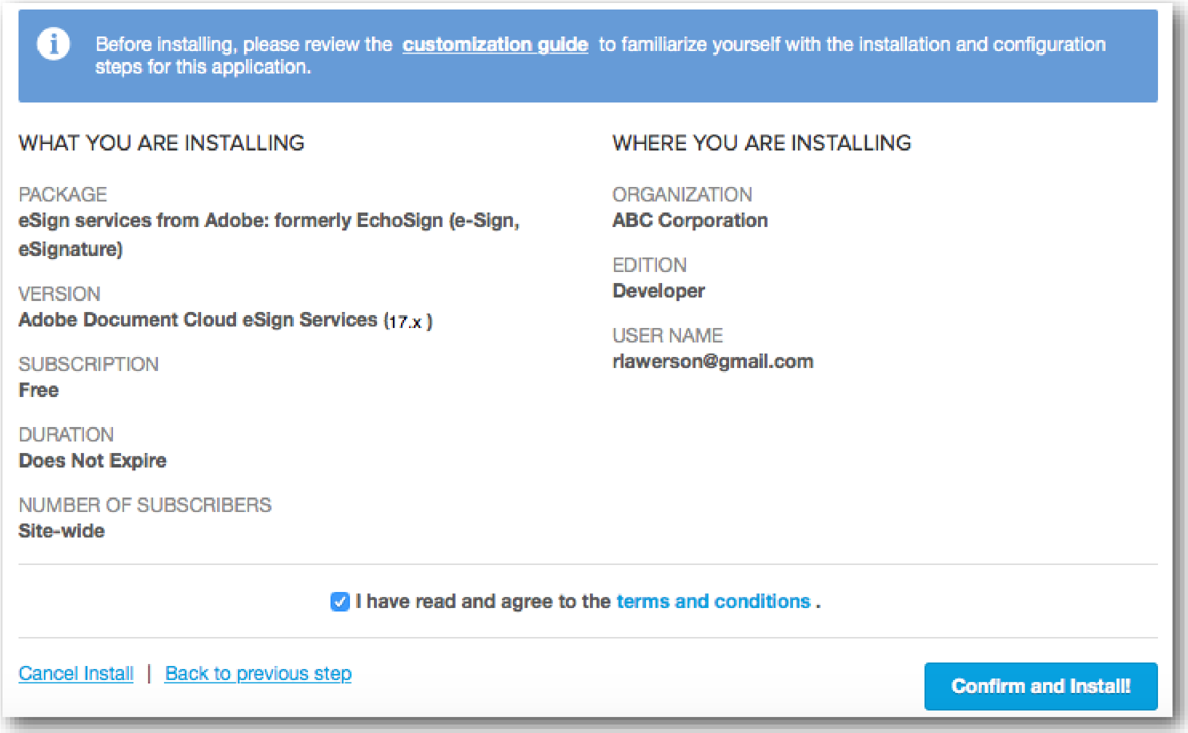
3. Select the appropriate login option. If you already have a Salesforce account, select 'Log in to the AppExchange' and enter your credentials to continue. If you don't have an account, select 'I don't have a login'. You will be prompted to create a Salesforce account. When you are done, repeat steps 1 and 2 to log in with your credentials.



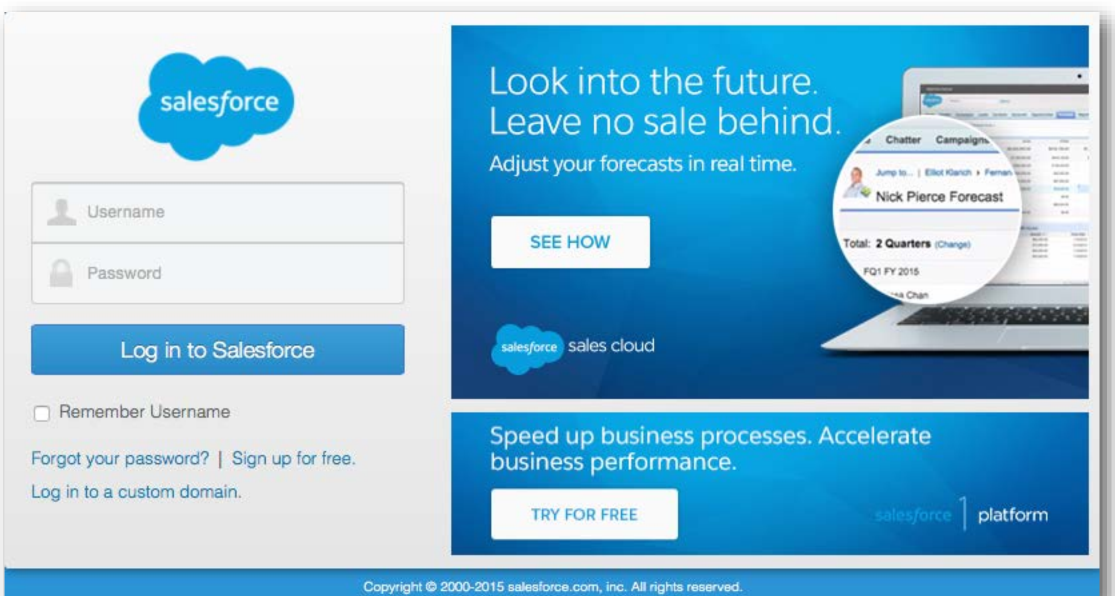
4. Determine where you would like to install eSign services (production or sandbox).



5. Review the installation information and terms and conditions, confirm that you have read and agree to the conditions, then click **Confirm and Install!** to start the installation process.



6. When prompted to login to your Salesforce organization, enter the Username and Password then click **Login in to Salesforce**.

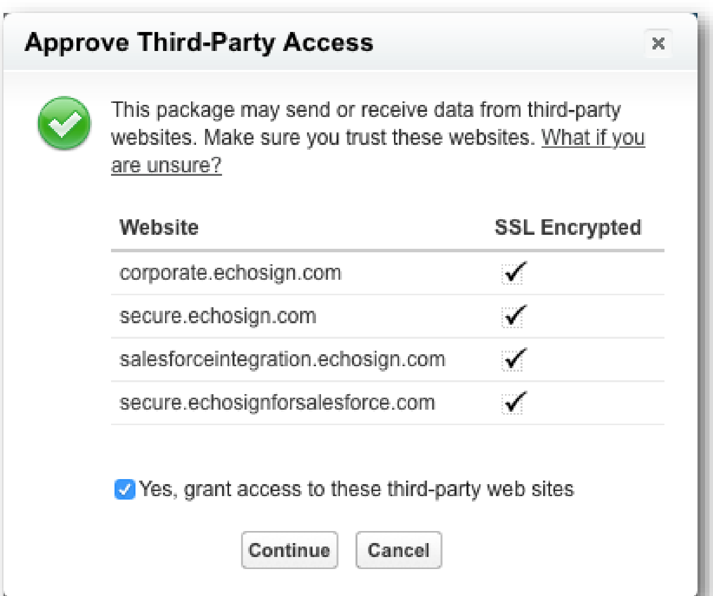


Note: You can optionally register for mobile phone during log in. Or you can respond 'No thanks'.

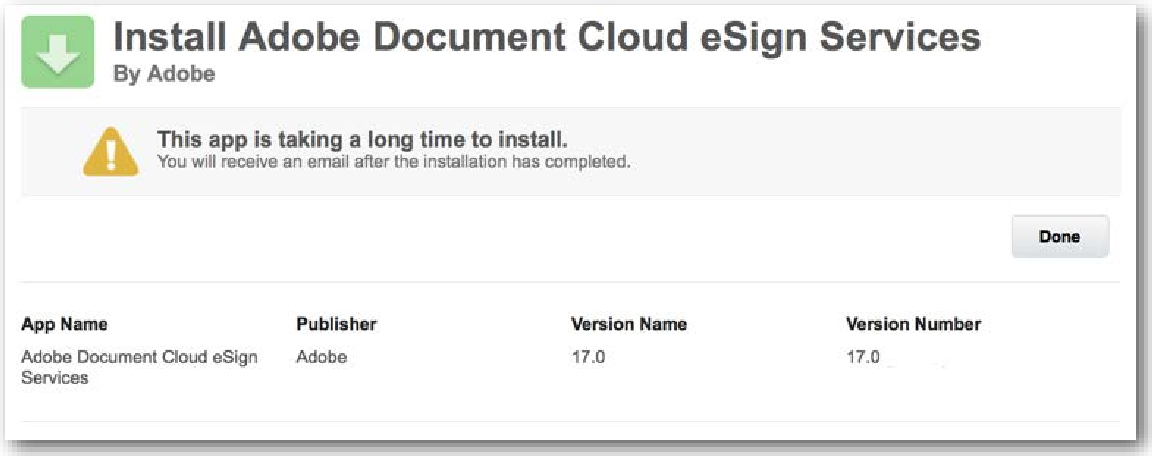
7. When the *Install Adobe Document Cloud eSign Services* page displays, we recommend that you select the 'Install for All Users' option then click **Install**.

Note: If you select 'Install for Admins Only' or 'Install for Specific Profiles' when installing for the first time, you will need to grant additional access later. For instructions on how to enable access for additional user profiles after installation, please refer to this documentation guide about extending access.

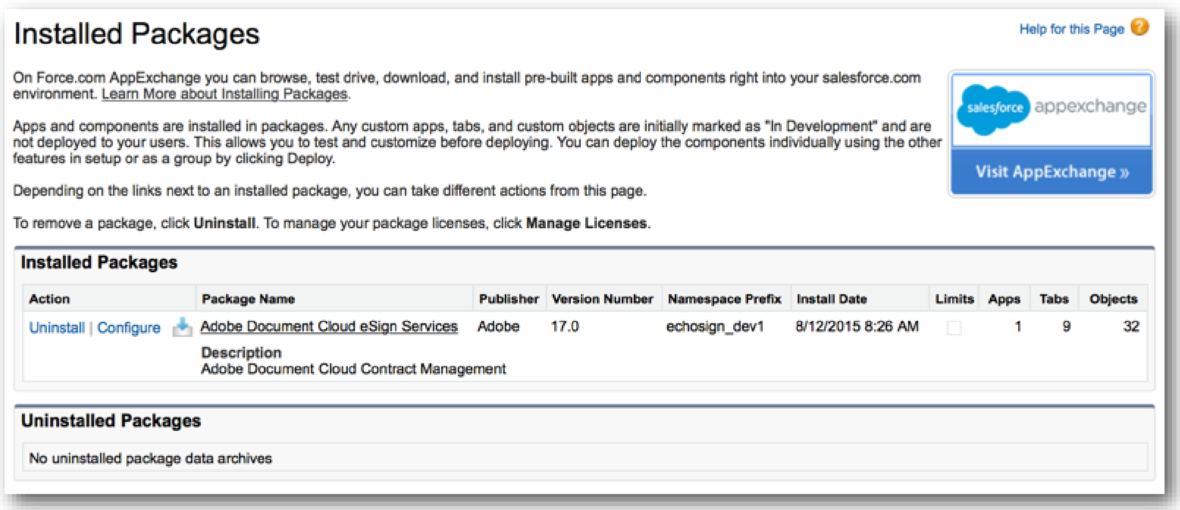
8. In the Approve Third Party Access popup, enable 'Yes, grant access to third-party web sites' so that Salesforce can securely access eSign services. Click **Continue** to start the installation.



9. Installation can take a several minutes. During the process, a notification page displays. Once you receive the email notifying you that the package has been installed successfully, click **Done** to continue.



The Installed Package page displays your installation information.



When installation is completed, follow the [simple setup steps](#) to get started with Adobe Document Cloud eSign services.

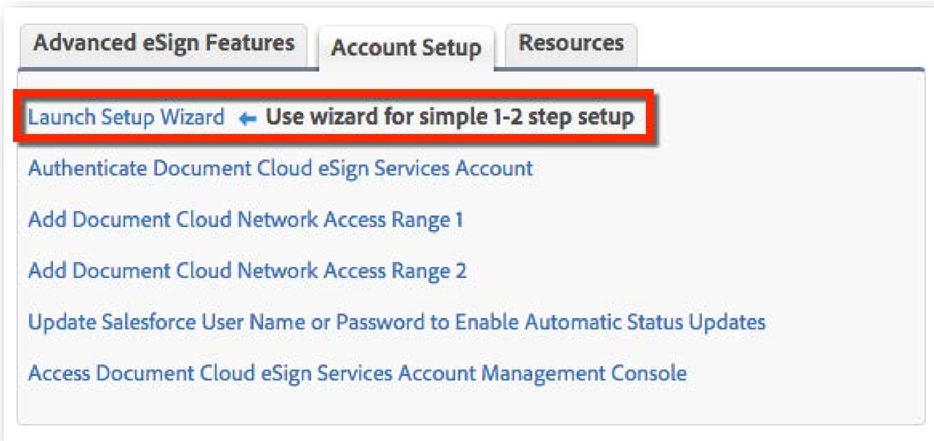
Configuring eSign Services after Installation

A few simple setup steps are required before you can start sending eSign services agreements from Salesforce. These steps are described below.

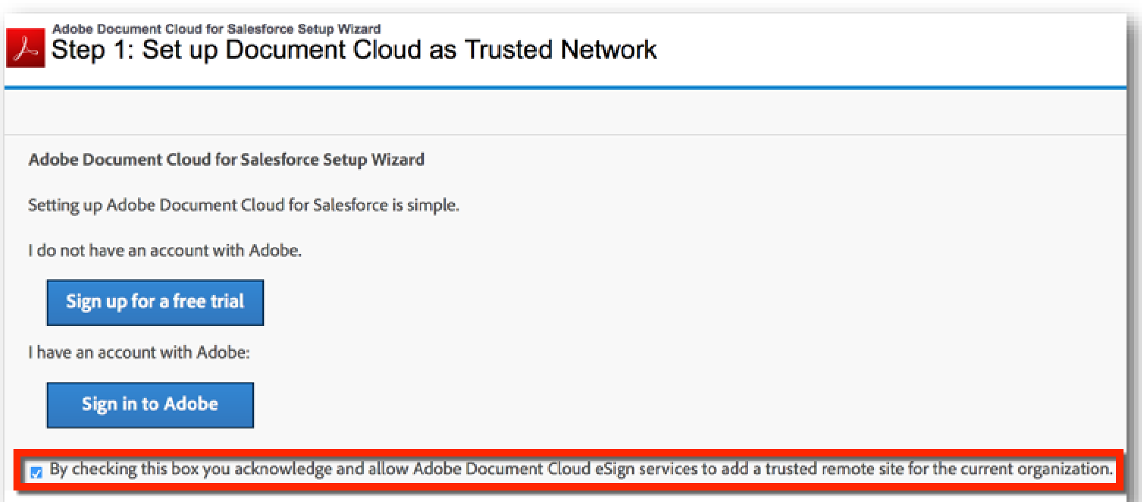
Note: Before proceeding with the configuration, please ensure that the *Lock sessions to the IP address from which they originated* and the *Lock sessions to the domain in which they were first used* settings are <u>disabled</u>. To access these settings click **Setup** then navigate to **Administer | Security Settings | Session Settings**.

1. Select **Adobe Document Cloud** from the Force.com App Menu at the far right then click the **eSign Services Admin** tab to launch the Setup Wizard.

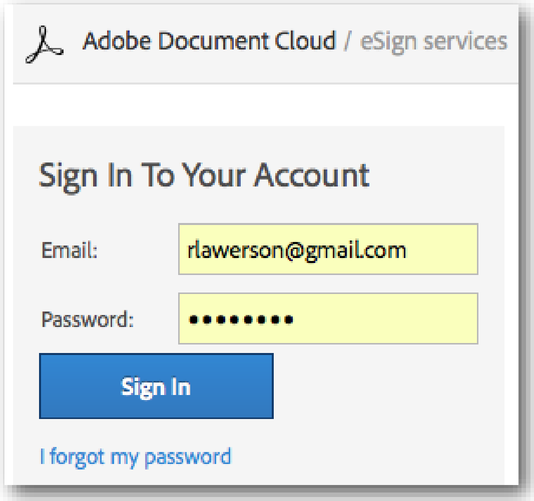
Note: If the Setup Wizard doesn't launch automatically, click the **Account Setup** tab in eSign Services Admin, then click the **Launch Setup Wizard** link as shown below.



2. In "Step 1: Set up Document Cloud as Trusted Network" of the Setup Wizard, enable the checkbox at the bottom to acknowledge and allow Adobe Document Cloud eSign services to add a trusted remote site for the current organization, then choose whether to **Sign up for a free trial** or **Sign in to Adobe** with your Adobe account.

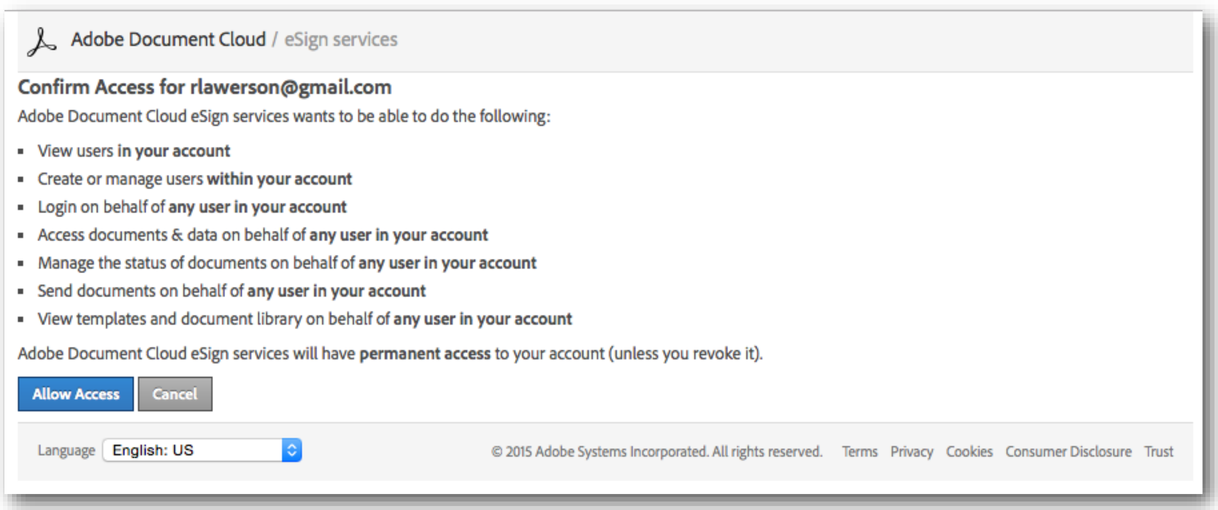


a) If you select ‘Sign in to Adobe’, you are prompted to sign in on *Adobe Document Cloud / eSign services Sign In* page.

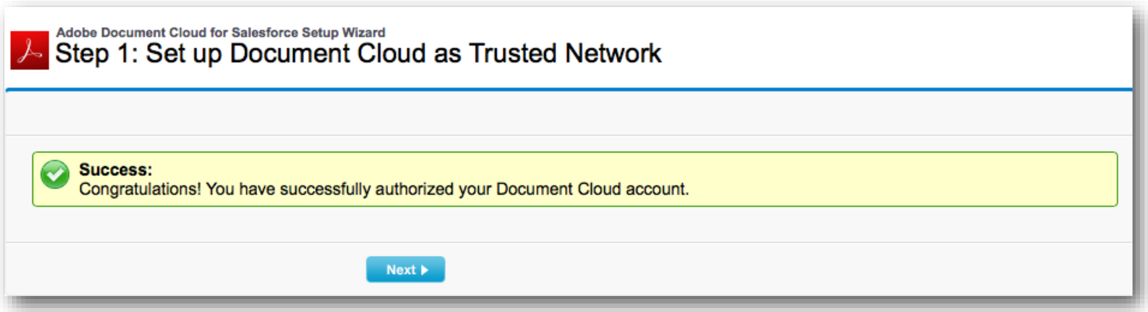


b) If you select ‘Sign up for a free trial account’, a new browser page opens prompting you to create a new account. After you create your account, you must close the browser page, navigate back to the Salesforce page, then select the ‘Sign in to Adobe’ option to continue.

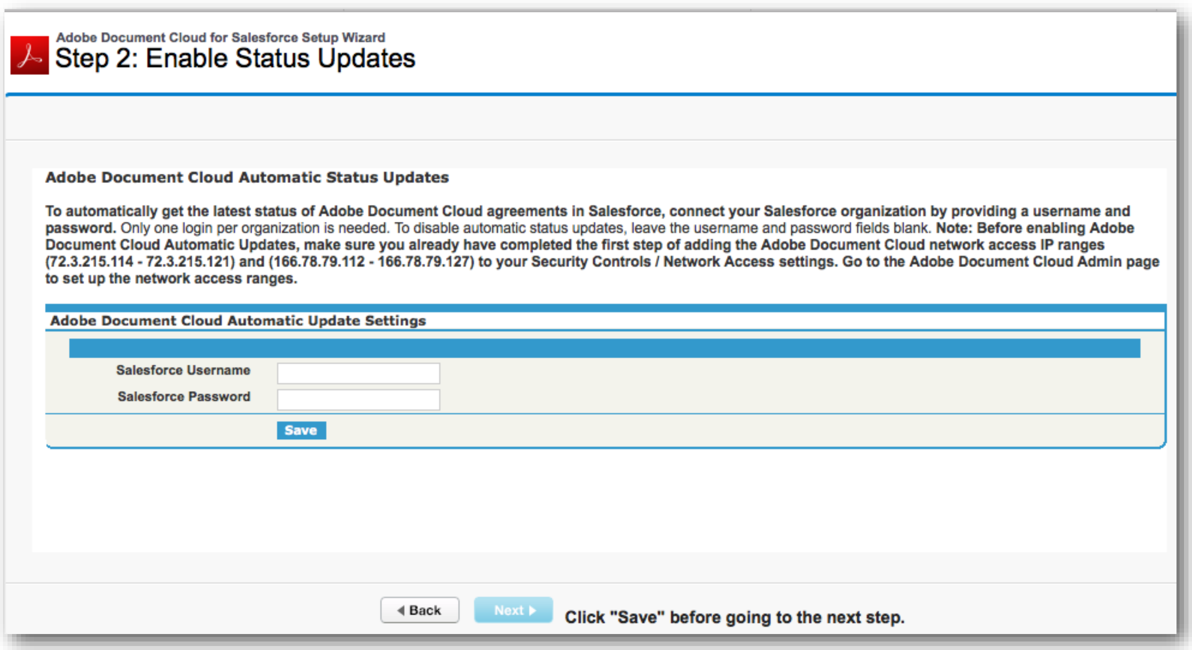
3. After signing in to your Adobe Account, the Confirm Access page (for OAuth) displays. Click **Allow Access**.



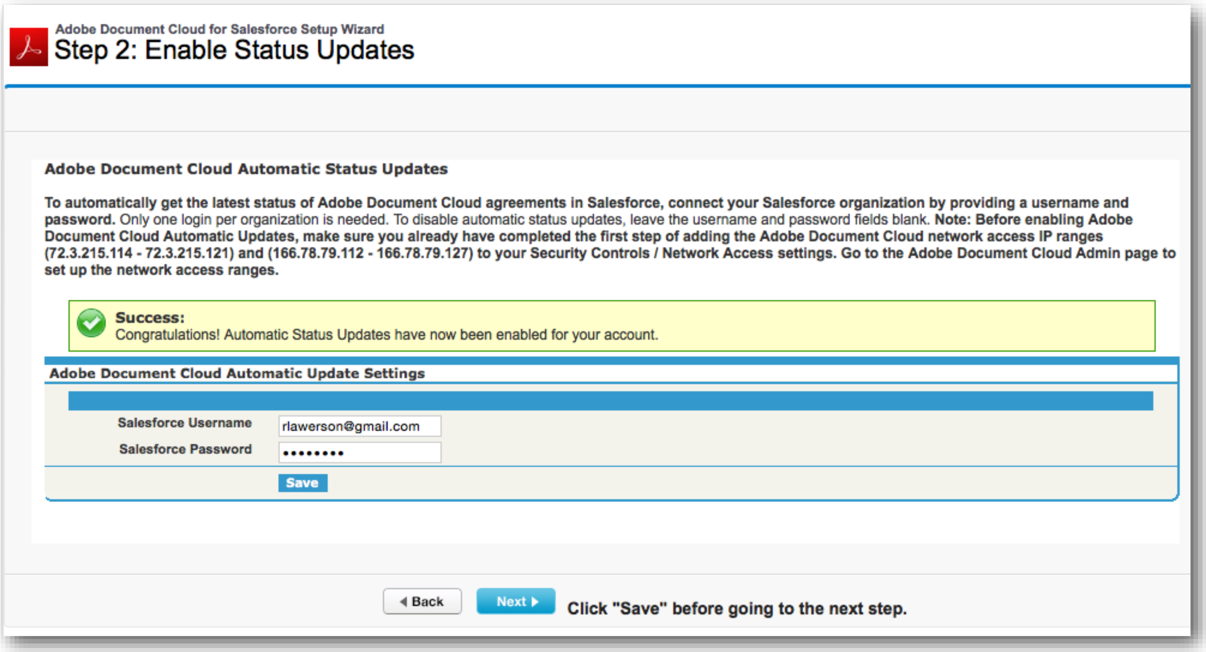
4. When “Step 1: Set up Document Cloud as Trusted Network” of the Setup Wizard redisplays confirming that you have successfully authorized your Document Cloud account, click **Next**.



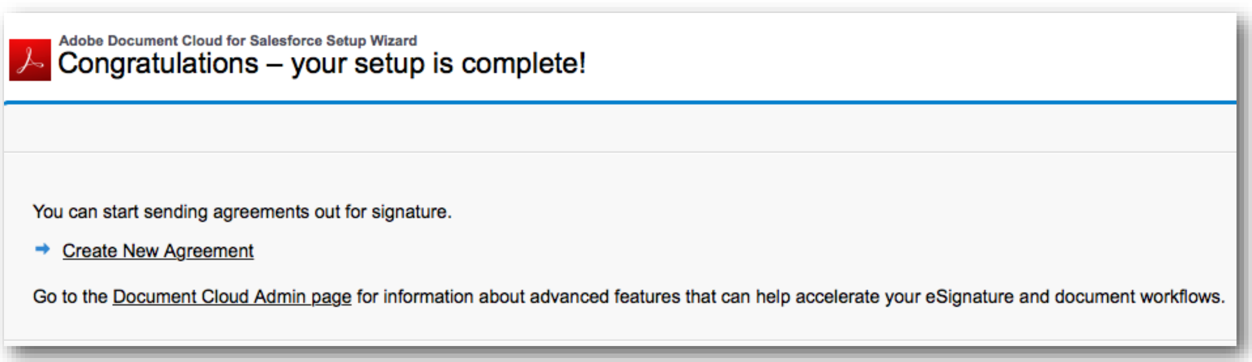
5. In “Step 2: Enable Status Updates” of the Setup Wizard, enter your Salesforce Username and Salesforce Password. Click **Save**.



6. Click **Next** at the bottom of the page to proceed.



When Setup Wizard displays "Congratulations – your setup is complete," you can start using eSign services for Salesforce.

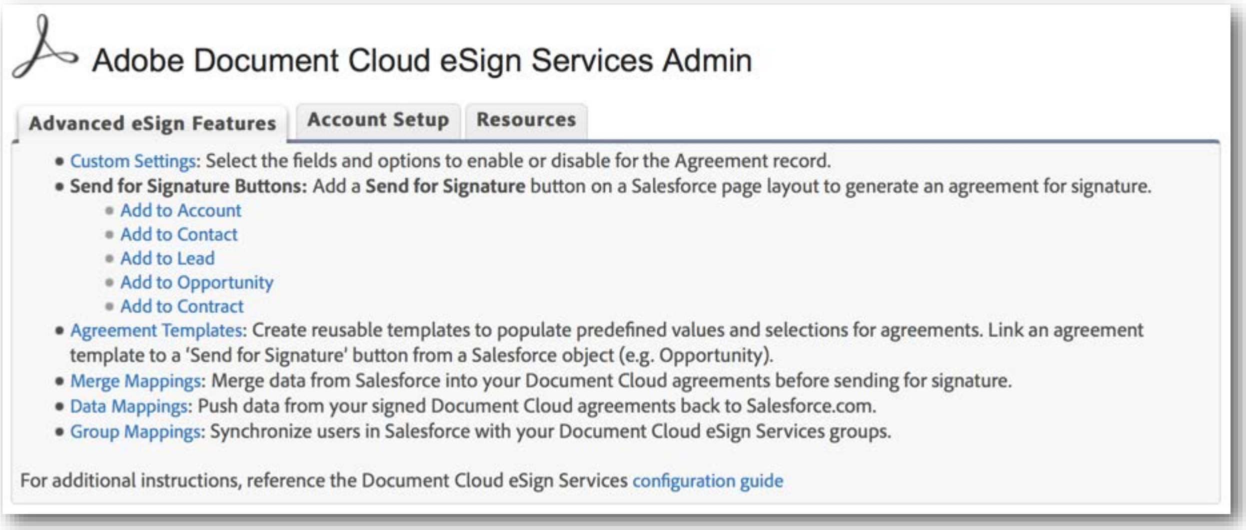


Notes:

- If you run into issues sending agreements, you can contact Adobe Support to ensure that your eSign services account is slotted in the right channel for the Salesforce integration, which is the default for Salesforce users.
- If you are using Salesforce Professional Edition, you will need to complete installation by following the additional steps in the section eSign Services for Salesforce Professional Edition - Additional Installation Steps.

Congratulations! You have successfully installed and set up eSign services for Salesforce. Try SENDING AN AGREEMENT and experience eSign services for the first time.

After the initial setup, you can use the eSign Services Admin tab to access advanced eSign services features, account setup, and other resources.



Important Sandbox Testing Notes

When testing on a Salesforce Sandbox, you often are not using a real email address that you have access to. (e.g., user@company.com.sandboxname) If so, we strongly recommend that you change your Salesforce Sandbox email to a real email address before you begin testing so that your Adobe Document Cloud eSign services account is tied to a real email address. If not, it may be problematic if you want to change your email address later when you move to Production because your Adobe Document Cloud account will be tied to an email address that does not exist and cannot be verified to make email changes.

Adobe Support

For questions and additional assistance, please visit the eSign Services Help.

If you run into issues configuring Adobe Document Cloud eSign services for Salesforce or sending agreements, you can also contact your designated Client Success Manager for assistance.

Next Steps after Installation and Configuration

eSign services for Salesforce is now installed in your Salesforce organization. The following are some optional next steps for further customizing and using eSign services for Salesforce.

Users will often leverage agreement templates to prepopulate agreement record options that will be associated with a single Send button (e.g., NDA agreement workflow from Opportunity or Sales contract from Lead object). You can also automatically merge data from Salesforce into document templates and collect data from signers to push back into Salesforce. There are sections marked as (Key Features) below that you can explore to further optimize and automate your signature workflow.

1. Basic Customization

- Start sending agreements.
- Add the Agreement List to Contacts, Opportunities, Accounts, Leads and Contracts Page Layouts.

2. Advanced Customization and Settings

- Custom Settings and Customizations for Salesforce (Key Feature)—Change eSign services for Salesforce behavior and available options.

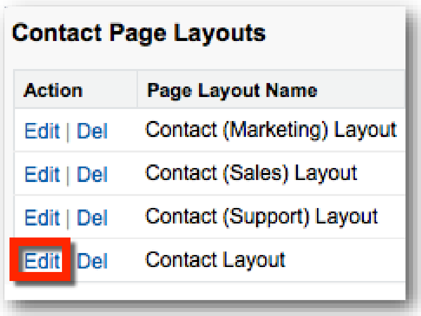
3. Enable Advanced Features

- Data Mappings (Key Feature)—Map form field data entered by signers and push eSign services agreements back into Salesforce objects.
- Merge Mappings (Key Feature)—Merge data from Salesforce objects into form fields in eSign services agreements before they are sent for signature.
- Agreement Templates and Send for Signature Button (Key Feature)—Set up default values and settings for your agreements ahead of time. Also, optionally link an agreement template to a **Send for Signature** button on a Salesforce object (e.g., Opportunity).
- Advanced Signer Authentication Methods (Key Feature)—Add additional level of verification of signers' identity through Knowledge Based Authentication or Web Identity verification.
- eSign Services for Chatter(Key Feature)—Set up eSign services for Chatter to get Agreement status updates to your Chatter feed. Send agreements from directly within Chatter with Chatter Actions.
- Working with Agreements in Batch (Key Feature)—Create agreement records in batch through a simple query. Send and manage multiple agreements with a single action.
- Group Mappings—Synchronize users in Salesforce profiles with your eSign services groups.
- Configure Salesforce Sites if your users may be sending large transactions (greater than 4.0 MB from the send agreement page and 9.0 MB when sending in batch).
- Updating Salesforce with Push Agreements—Even if you send agreements or create eSign services Widgets directly through the eSign services API or send agreements from echosign.adobe.com, you can have those agreements pushed into Salesforce.
- Automation and Background Actions—In conjunction with Salesforce workflow or triggers, set up automatic agreement workflows through background actions, onLoad actions, or sending on behalf of another user.
- Require Sign On to Salesforce.com to Access eSign Services Account—To control access, require that your Salesforce.com users be signed on to Salesforce to access their eSign services accounts.

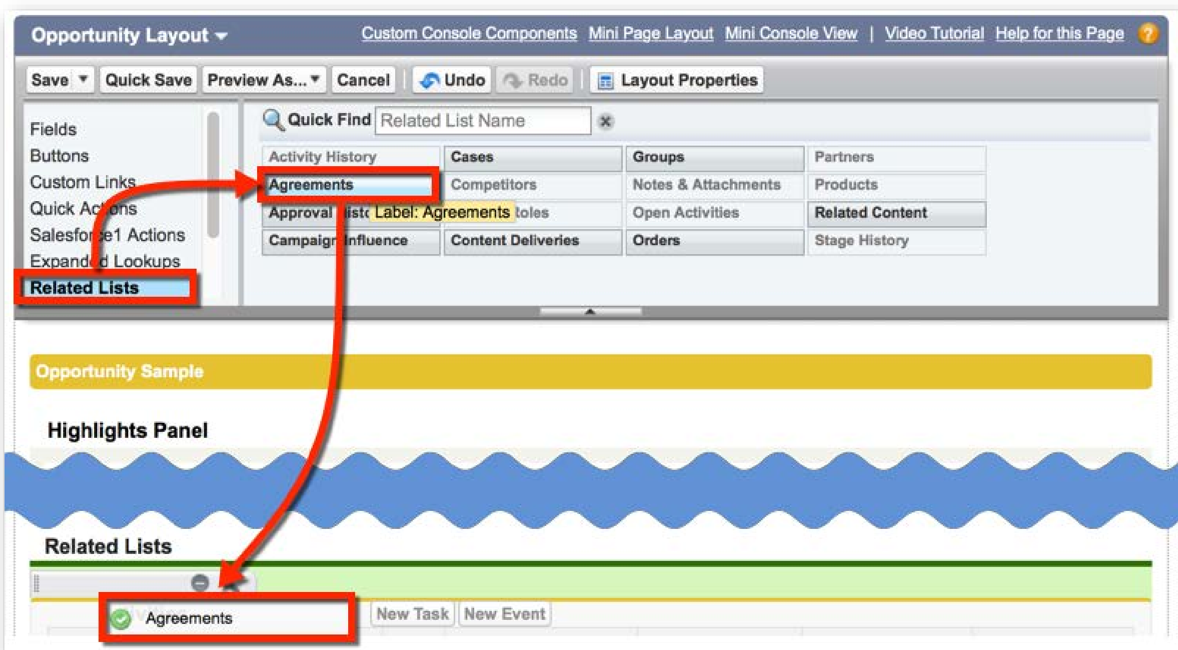
Adding the Agreements List to Page Layouts

The instructions below describe how to associate Agreements with a Contact object, but they can be applied to any other object referenced from the Agreement object – Opportunities, Accounts, Leads and Contracts.

1. Click **Setup** then navigate to **Build | Customize | Contacts | Page Layouts**. (See also Finding the Setup Menu and Searching Setup with Advanced Setup Search (Beta) in the Salesforce Help for more information.)
2. Click the **Edit** Action for the Contact Layout.



3. Click on **Related Lists** then drag and drop the *Agreements* list to the desired place on the page layout.

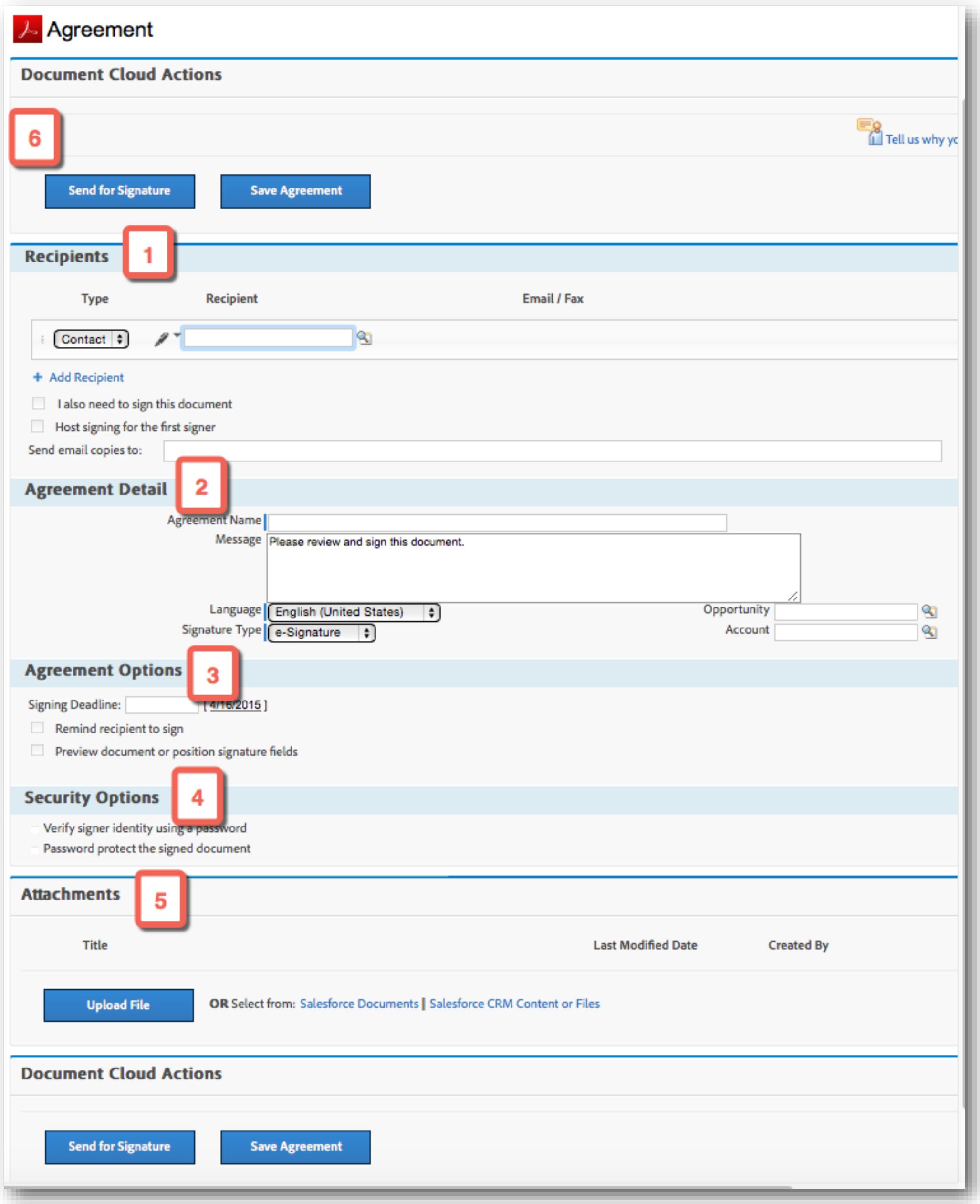


4. Click the **Save** button.

Sending an Agreement Using eSign Services for Salesforce

You can send an agreement from an object that has an Agreements related list. See Adding the Agreements List to Page Layouts for more information.) You can also send an agreement from the Agreements page.

1. Click the **Agreement** tab, then click the **New** button. Or, on the Agreements related list in one of the related objects (Leads, Accounts, Contacts, Opportunities, and Contracts) click the **New <*Object*>** button. The Agreement page displays.



2. Specify the recipients. Select if the recipient is an approver or signer. If you have multiple recipients, you can reorder them before sending by dragging the recipients up or down. You can specify whether recipients sign in order or in any order. Additionally, you can enable *Host signer for the first signer* option

to obtain an in-person signature. In the *Send email copies*" field, you can use commas, spaces, or semi-colons to list any number of emails that need to be copied on notifications for this agreement.

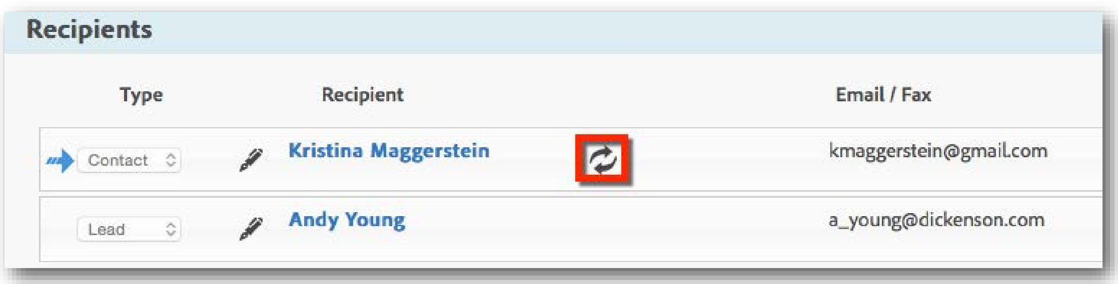
3. Name the agreement, type a message, select signature type and language. Select a related Opportunity or Account.
4. Select the relevant sending options such as expiration date, reminders, or enable the *Preview document or position signature fields* option.
5. Select the security options such as a password for the signed PDF.
6. Attach files from your computer or from the Salesforce Documents or from Salesforce Files and Content or eSign services Document Library. If you have multiple file attachments, you can reorder them before sending by dragging the documents up or down.
7. Click the **Send for Signature** button.

Replace Signer

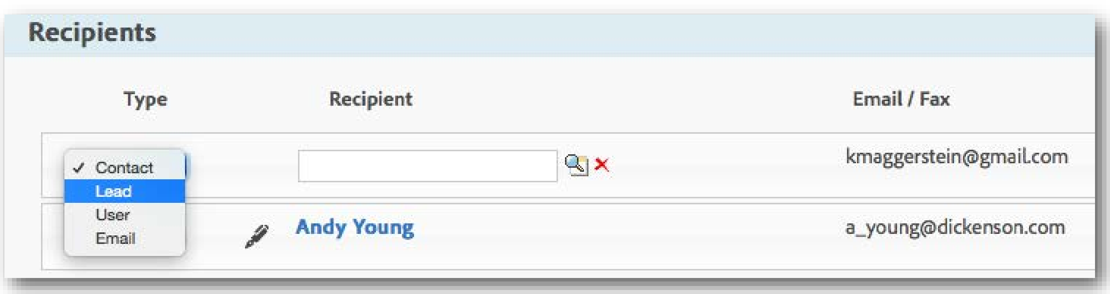
When the agreement is out for signature, you can replace the current signer.

Note: The *Hide Replace Signer* setting controls whether you can replace the signer. By default, it is enabled. (See Custom Document Cloud Settings for more information.)

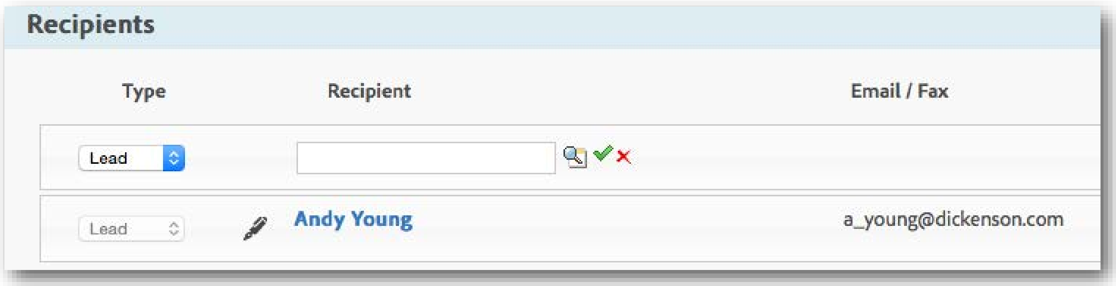
1. Open the agreement.
2. In the *Recipients* section, click the replace signer icon .



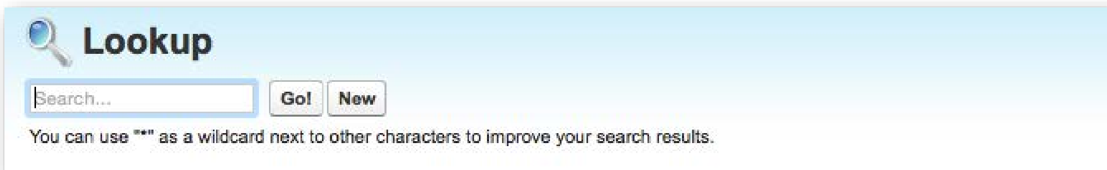
3. When the current signer clears, select the *Contact*, *User*, or *Lead* from the Type drop-down.



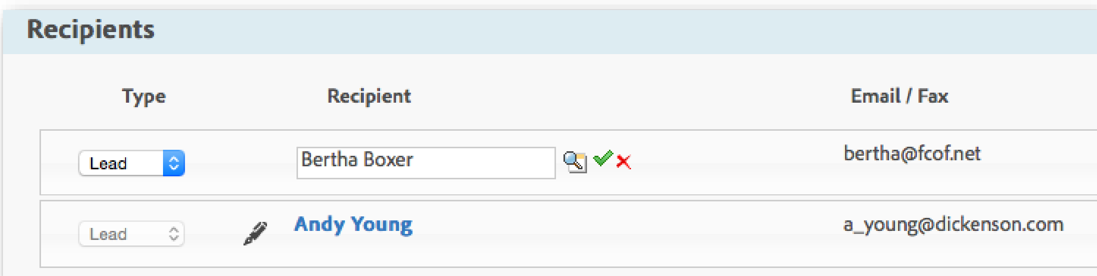
4. Click the search icon. (Or click the cancel icon to restore the original signer.)



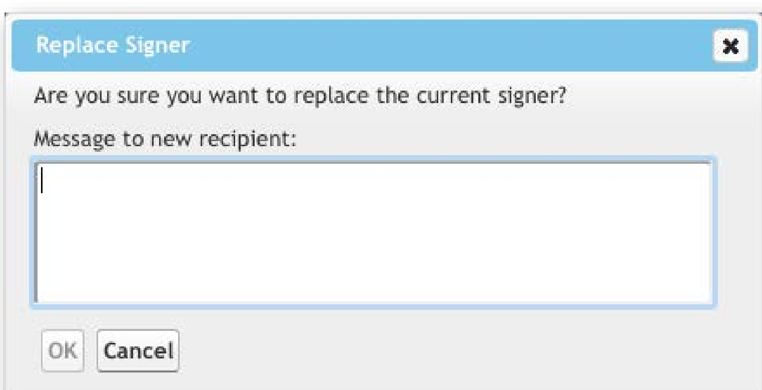
5. Enter your search criteria in the *Lookup* dialog. (See [Lookup Search Dialog]() in the Salesforce online help for more information).



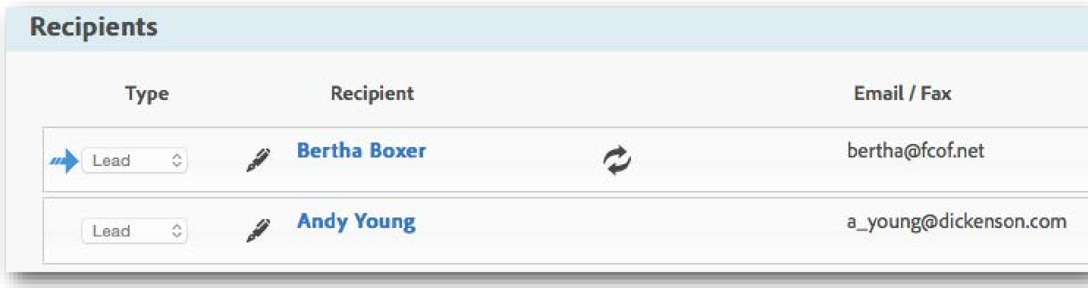
6. Click the checkmark to save it. (Or click the cancel icon to restore the original signer.)



7. In the *Replace Signer* dialog, enter a message for the new recipient then click **OK**.

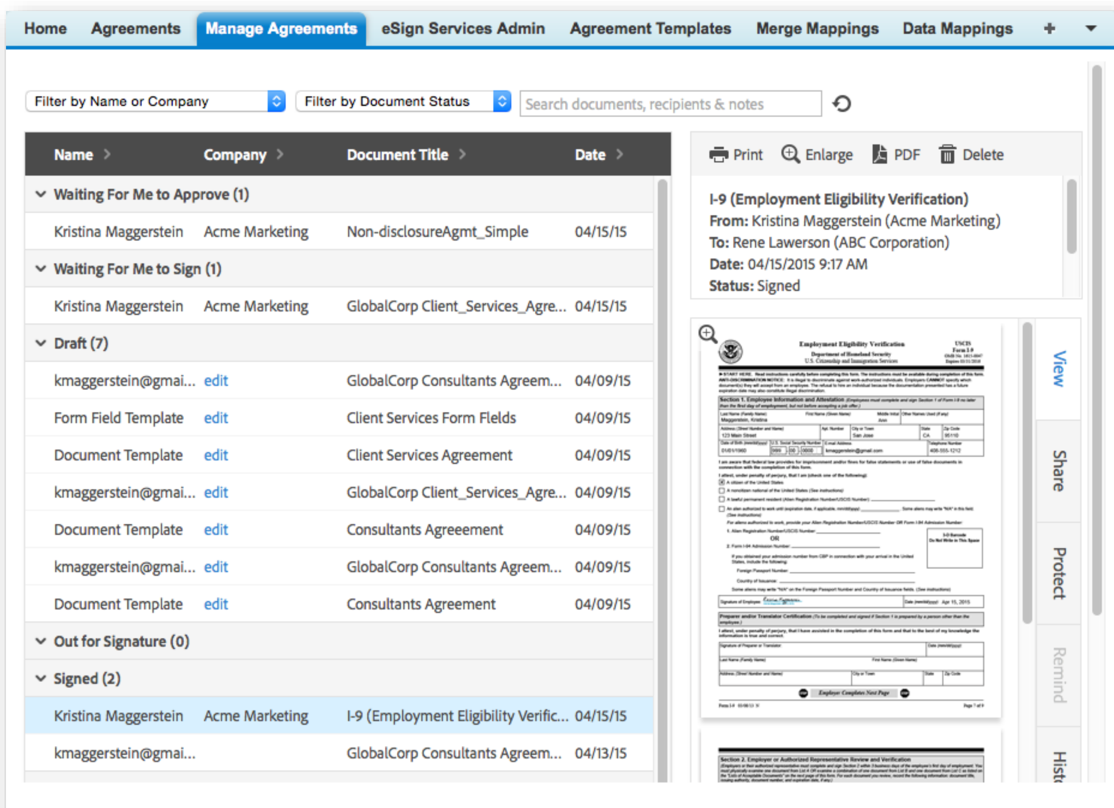


The Recipients section updates with the new recipient's information. Note that the blue arrow pointing to a recipient indicates who the current signer is in the workflow.



Manage Agreements

Also keep in mind that eSign services has a full Manage page, which gives you a view of all of your eSign services agreements in different stages of the agreement workflow. It also has functionality to edit signers, expiration dates, and signer authentication for your document.



Using eSign Services Forms

Adobe Document Cloud eSign services gives you the ability to use interactive forms to collect data from your signers, position signature and initial fields in your documents, collect two-party information from both sender and signer and more.

You can create your own eSign services template library by storing eSign services forms and templates in your Salesforce Documents tab.

eSign services Text tags provide the following benefits:

- Set specific locations for customers to sign and initial documents
- Collect data from signers that can later be pushed back into your Salesforce account. Learn more about setting up data mappings. (See Data Mappings for more information.)
- Merge data from Salesforce into document fields before sending for signature. (See Merge Mappings for more information.)

You can create eSign services forms by adding special text tags in any document you send through eSign services (Word, PDF, Text, etc.). For more details read our Text Tags Documentation.

Data Mappings – Push Signer Data & Files to Salesforce Records (Key Feature)

eSign services form field data mappings let you define how eSign services will update Salesforce.com objects with data it captures from signers. For example, you can update a signer's contact record in Salesforce.com with the address and phone number they provided when completing and signing your document. Additionally, you can also push back the eSign services signed agreement, audit trail, and any uploaded supporting documents from recipients into Salesforce objects by setting up file mappings.

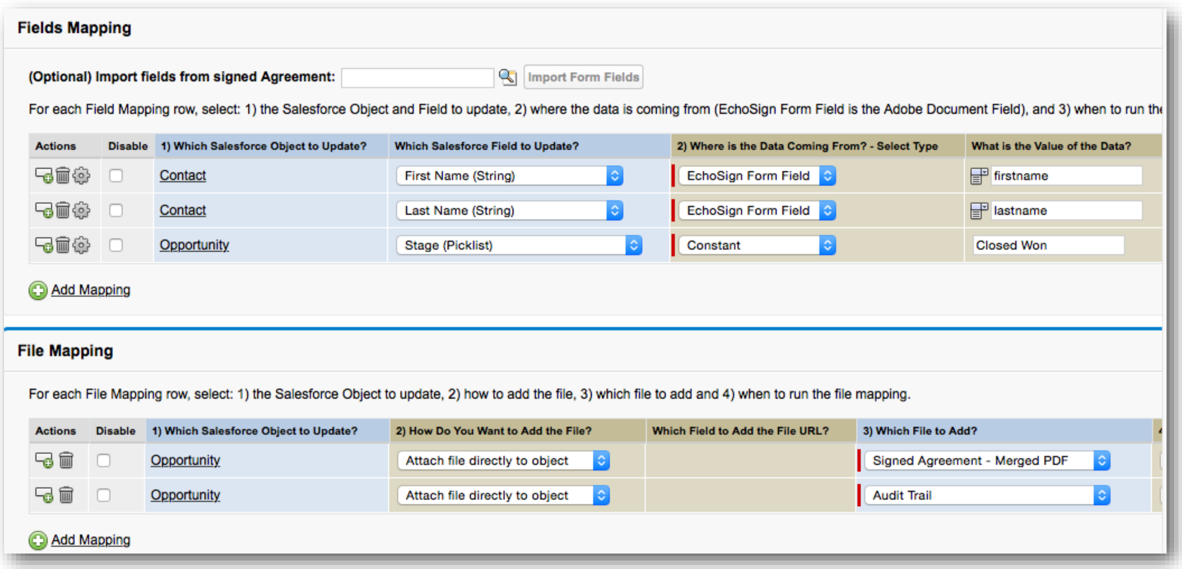
If you choose not to use this feature, skip this section.

About Form Field Data Mappings

Document Cloud Data Mappings update Salesforce objects when an eSign services agreement is signed or at a specified stage in the agreement workflow. Each Data Mapping is set up ahead of time and includes data mapping rules. Each data mapping rule defines the data source and the target Salesforce field it needs to update.

A data source for a mapping can be an eSign services form field, a specific constant value or a value from an eSign services Agreement Field. The target for each data mapping item may be any field in any Salesforce object that can be referenced from the eSign services Agreement.

For example, the mapping below updates the signer's first and last name (as entered by the signer) in the Contact object. It also updates the Opportunity Stage and adds the signed agreement and audit trail to the Opportunity when the agreement is signed.

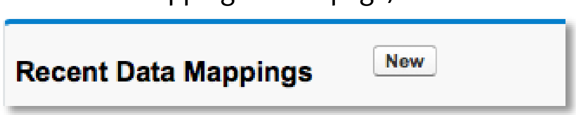


Some other examples for using data mappings to update Salesforce include: 1) updating recipient contact information, 2) adding a PO number to the Opportunity, 3) updating payment information to the Account, 5) changing Opportunity Stage when the contract is signed, and 6) adding the signed PDF and audit trail to the Contact.

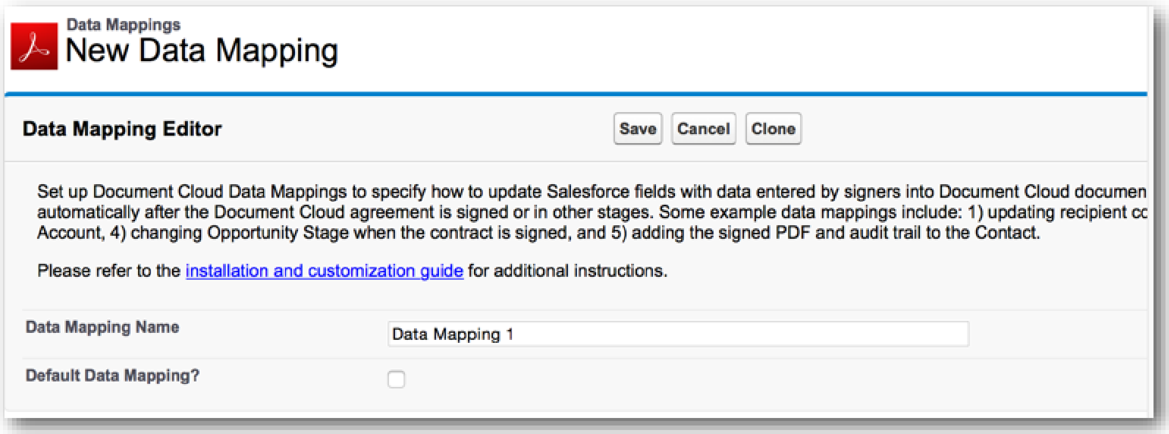
Creating a Form Field Data Mapping

To create a new eSign services Data Mapping, follow the steps below:

1. Select **Adobe Document Cloud** from the Force.com App menu at the top right of the screen.
2. Click the **Data Mappings** tab.
3. In the Data Mappings Home page, click the **New** button.



4. In the New Data Mapping page, type a name for the mapping and decide whether you would like it to be the default mapping. If you check 'Default Data Mapping?', the mapping will execute by default after your agreements are signed. You don't have to set a data mapping as a default. You can assign it to an Agreement Template that will be used when an agreement is created.

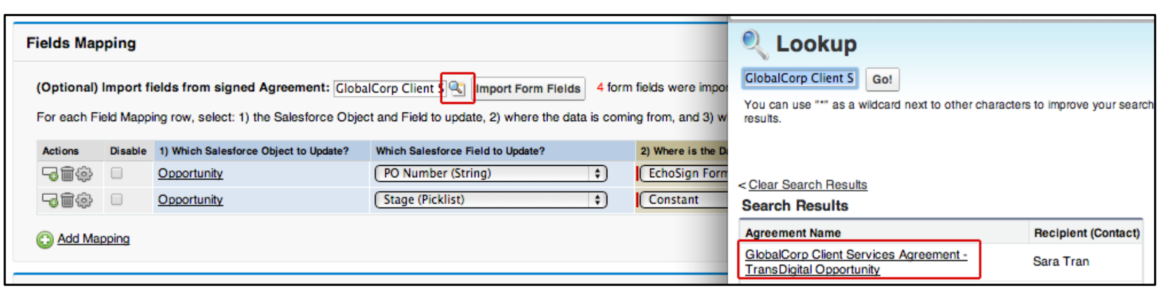


5. Use the *Fields Mapping* section to define data mappings to Salesforce fields. You can add mapping rules to update fields to any related Salesforce object. You can create a mapping to any field (including custom fields). There are two ways to create mapping rows and specify which agreement fields the data is coming from. You can import fields from an existing document using **Import Fields from and Existing Agreement**. Or, you can define each mapping row individually using **Add Mapping**.

   a) You can use **Import Fields from an Existing Agreement** to import a list of form field names from which to create mappings by selecting an existing agreement that was sent for signature and signed. You can import fields from additional agreements to add additional fields. To import fields from an agreement, do the following:

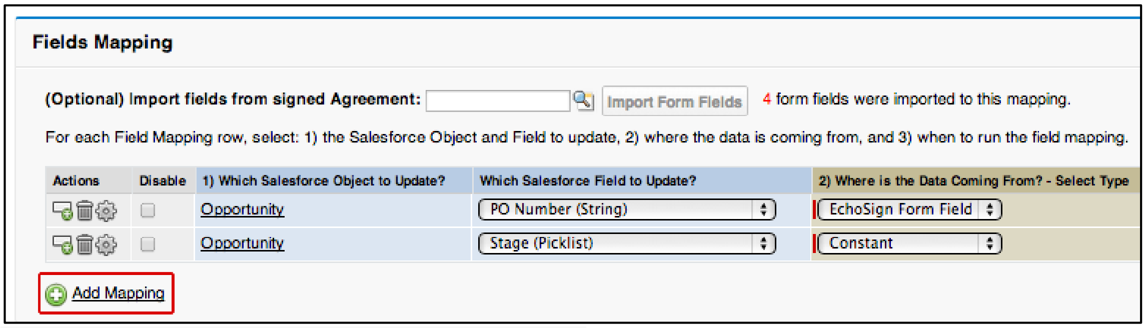
   Note: If you do not have any custom eSign services fields in the document you are importing from, you will not be able to import the standard default eSign services fields that come with each signed agreement. (e.g., signed (date), email, first, last, title, and company).

   i. Select the agreement you would like to import fields from.



   ii. Click the **Import Form Fields** button. The number of fields imported displays.

   b) You can use **Add Mapping** to add mapping rows individually as shown below:



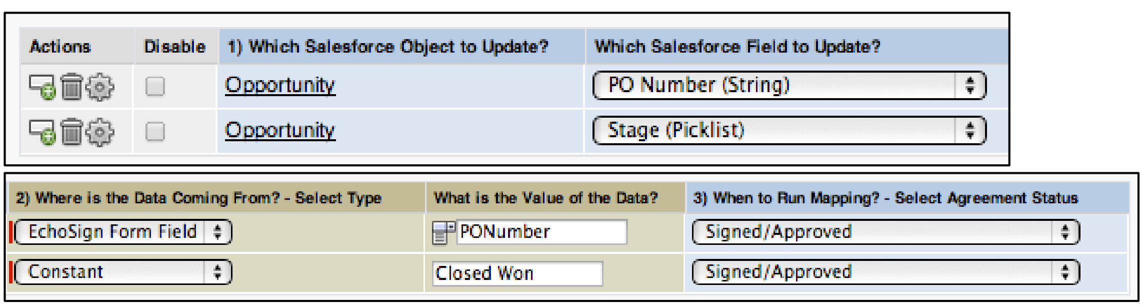
For each Field Mapping row, specify the following:

1a) Which Salesforce Object to Update?—Select the target Salesforce object where the data will be copied.
1b) Which Salesforce Field to Update?—Select the target Salesforce field where the data will be copied.
2a) Where is the Data Coming From?—Select Type—Select one of the following options: *EchoSign Form Field, Constant,* or *Agreement Field*.
2b) What is the Value of the Data?—Depending on *Data Coming From* option selected, you must specify the following:

- *Data Coming From 'EchoSign Form Field'*—Select an EchoSign Form Field or input in a specific field name. Click on the and icons to switch between a text input field and a selectable dropdown displaying the available and imported form field values.
- *Data Coming From 'Constant'*—Type a specific value. For example, you can put a field value that you want to change for a Salesforce picklist. Or enter a number or text that you want to update into a Salesforce field.
- *Data Coming From 'Agreement Field'*—Select an Agreement Field from the drop-down.

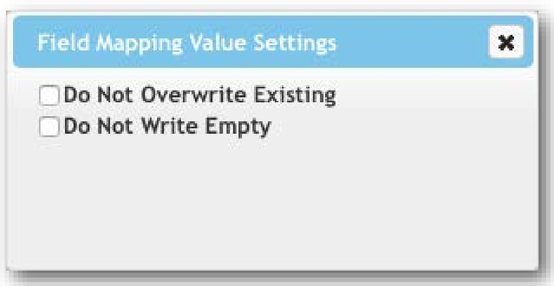
3) When to Run the Mapping? – Select Agreement Status—The data mapping will run when the agreement status changes to the specified status.

- Signed/Approved
- Waiting for Counter-Signature/Approval
- Out for Signature/Approval
- Cancelled / Declined
- Expired

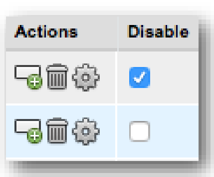


6. You can optionally modify the settings for any mapping row.
   a) Under Actions, click the Settings icon ( ).

   b) In the *Field Mapping Value Settings* dialog, you can specify the following:
      - **Do Not Overwrite Existing**—If checked, then if a value already exists in the target Salesforce field, do not overwrite the value using this mapping rule.
      - **Do Not Write Empty**—If checked, then if the source value from the eSign services agreement is empty, do not write the empty value into the target Salesforce field using this mapping rule.



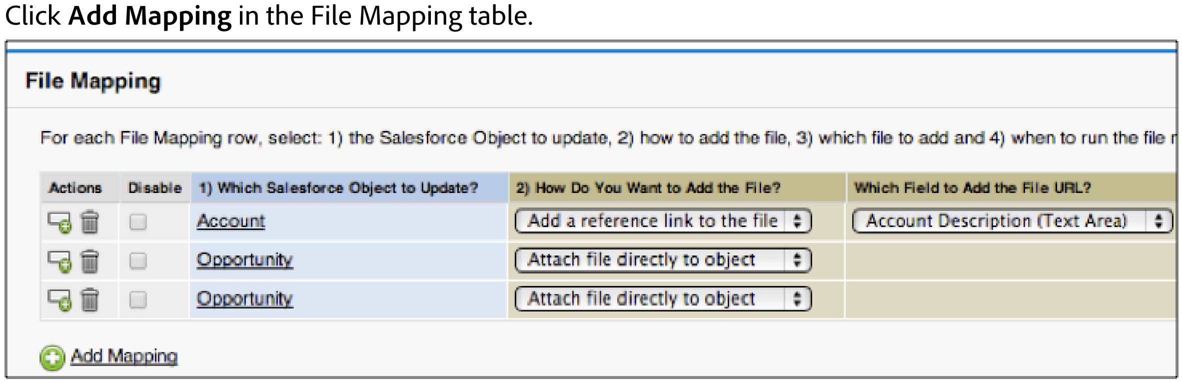
7. You can also optionally disable a mapping row so that it will not execute. To do this, click **Disable.**

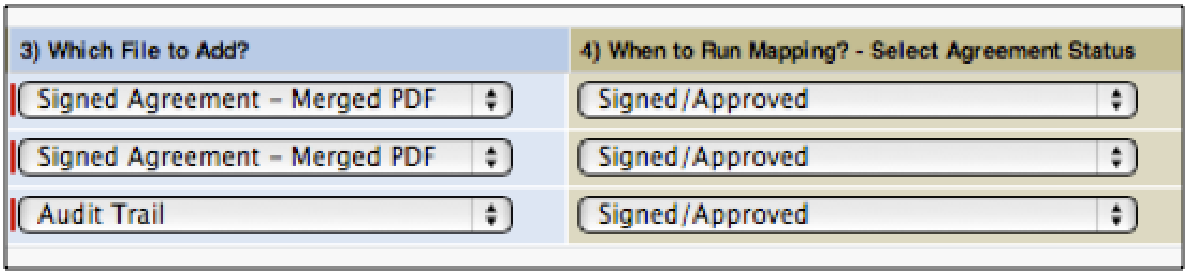


Creating a File Mapping

You can map the eSign services signed agreement or audit trial to the selected target Salesforce object, by doing the following:

1. Click **Add Mapping** in the File Mapping table.





2. For each File Mapping row, select:

1) Which Salesforce Object to Update?—Select the target Salesforce object where the data will be copied

2a) How Do You Want to Add the File?—The options are as follows:

- **Add a reference link to the file—**Provides the URL to get the signed agreement PDF.
- **Attach file directly to object—**Attach the PDF document directly to the object you are mapping to if an attachment list is available for that object.

Note: Not all objects (e.g., Users) support file attachments so do not map files to those objects.

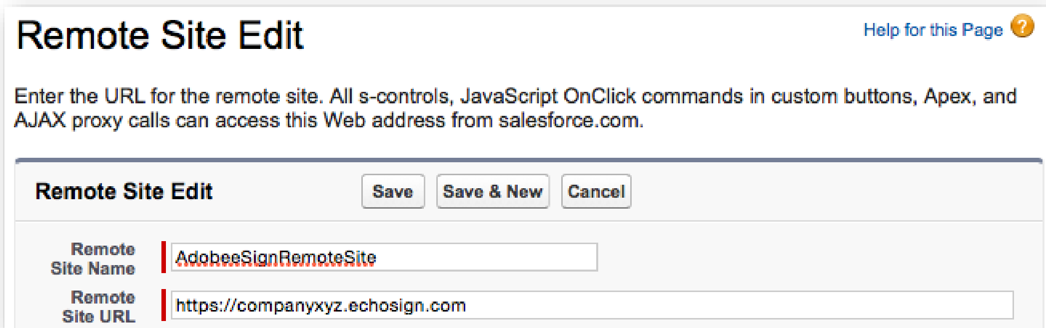
2b) Which Field to Add the File URL?—Only required if you select **Add a reference link to the file.** You must select the target field to which the URL will be copied.

Note: Adding a reference link for the audit trail or supporting documents is not supported. You can attach the audit trail PDF or supporting documents to the Salesforce object record. Also, the reference link can only be mapped into a text based field (e.g., string, picklist)

3) Which File to Add?—The options are as follows:

- **Signed Agreement – Merged PDF—**Select this option if you send multiple documents for signature in a single transaction, this option will push the signed documents back to the Salesforce object record as a single merged PDF.
- **Signed Agreement – Separate PDFs—**Select this option if you send multiple documents for signature in a single transaction, this option will push the signed documents back to the Salesforce object record as separate PDFs.
- **Audit Trail—**Select this option to push the audit trail in PDF format back to the Salesforce object record.
- **Supporting Documents—**Select this option to push back any supporting documents that are uploaded by the signers back to the Salesforce object record.

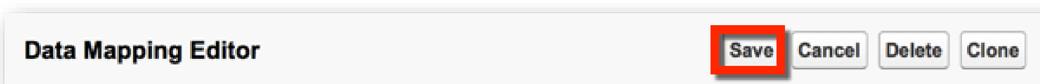
Note: If you have a custom URL in Adobe Document Cloud eSign services with a custom sub-domain (e.g., https://companyxyz.echosign.com), you need one extra step to get the signed agreement PDF back to Salesforce. Click **Setup** then navigate to **Administer | Security Controls | Remote Site Settings** and click the **New Remote Site** button. Add your Adobe Document Cloud eSign services URL as a new Remote Site URL. This is only necessary when mapping the signed agreement.



4) When to Run Mapping? - Select Agreement Status—The data mapping will run when the agreement status changes to a specified status. The options are as follows:

- Signed/Approved
- Waiting for Counter-Signature/Approval
- Out for Signature/Approval
- Cancelled / Decline
- Expired

3. Click **Save** to save the mapping.



Using Default and Multiple Data Mappings

You can create as many data mappings as necessary, one of which may be defined as the default mapping that will be executed whenever an agreement's status changes. Only one mapping can be a default mapping.

You can explicitly specify which mapping you'd like to use for an agreement by referencing it in the Agreement's 'Data Mapping' (echosign_dev1__Process_Template__c) field. You can use a Salesforce workflow or trigger to run custom business logic to determine which data mapping to use. Please note that you do not need to set that field to point to the default mapping – the default mapping would be executed if this field were left empty.

You can also execute a mapping before or after the Agreement status changes to 'Signed' (e.g., execute the mapping after the first signer signed it) by setting the 'Trigger Data Mapping' (echosign_dev1__Trigger_Process_Template__c) checkbox. You may use a Salesforce workflow or trigger to run any custom business logic to determine when to execute a Data Mapping.

In addition, you can associate a data mapping to an agreement template. See Agreement Templates for more information.

Troubleshooting Data Mappings

Salesforce fields have validation rules that may cause a mapping to fail. For example, if you map an eSign services text field to a Salesforce email field validation may fail if the content of the field is not a valid email address.

Please make sure to use eSign services form field validation rules where possible to ensure data entered by signers can be pushed into Salesforce. eSign services standard PDF form fields validation rules from PDF documents and allows you to create validation rules when using eSign services text tags. See the [Text Tag Documentation] for more information.

If a mapping fails for some reason, it logs the error message in the 'Data Mapping Error' (echosign_dev1__Data_Mapping_Error__c) field on the eSign services Agreement object. You may expose this field on the agreement page layout or create a simple report in Salesforce to find agreements where mapping errors had occurred. In addition, data mapping errors will be sent to the owner of the data mapping by email. Click **Setup** then navigate to **Build | Develop | Custom Settings** then select **Document Cloud Settings** to enable or disable the email notification using the *Enable Mapping Error Notification* setting that controls email notifications To enable the 'Data Mapping Error' field, follow the steps here and drag the field to the page layout.

Merge Mappings – Generate Documents with Salesforce Data (Key Feature)

eSign services Merge Mappings give you the ability to merge field data from Salesforce into your documents fields before sending them out for signature.

For example, you can populate a Lead's address and phone number from a Salesforce record automatically into the agreement before it is sent to the Lead for signature. You can also change the status of an Opportunity when the agreement is fully signed and executed. Merged data fields can also optionally be updated by signers if you choose to map the signer updates back to Salesforce.

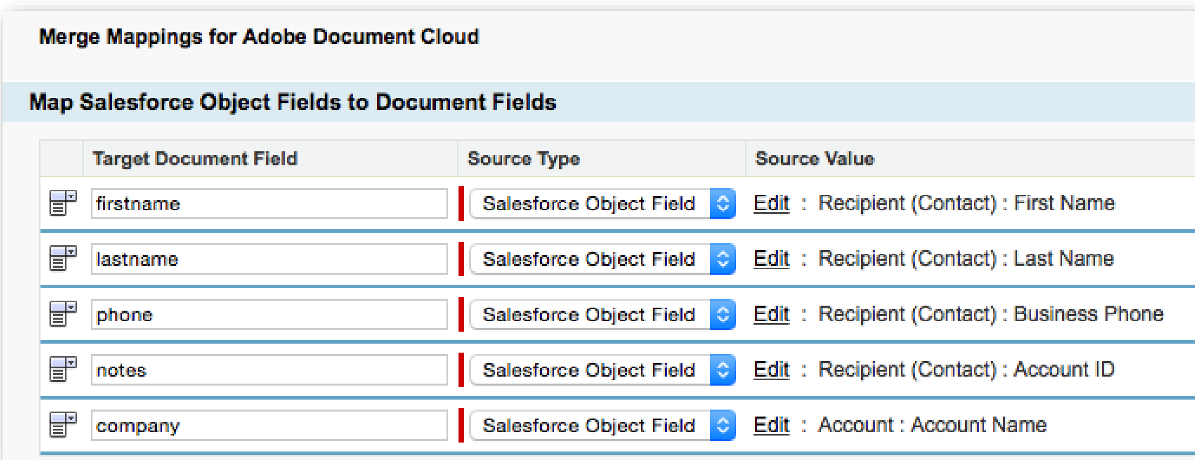
You can also use merge mappings to automatically add the product lists tied to an opportunity. You can set which product attributes (like quantity and price) are included in your agreements as well as specify how to sort and filter the associated products.

If you choose not to use this feature, skip this section.

About Merge Mappings

A data source type for a merge mapping can be a specific constant value or a value from a Salesforce object field that can be referenced from the eSign services Agreement. The target for each merge mapping item is a designated field from an eSign services agreement.

For example, the mapping below updates the eSign services document fields for first name and last name with the Salesforce Recipient (Contact) field data. It also fills in the company field in the document with the name of the account.

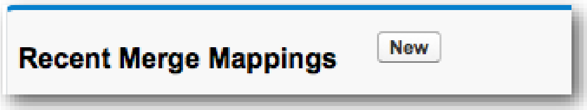


Creating a Merge Mapping

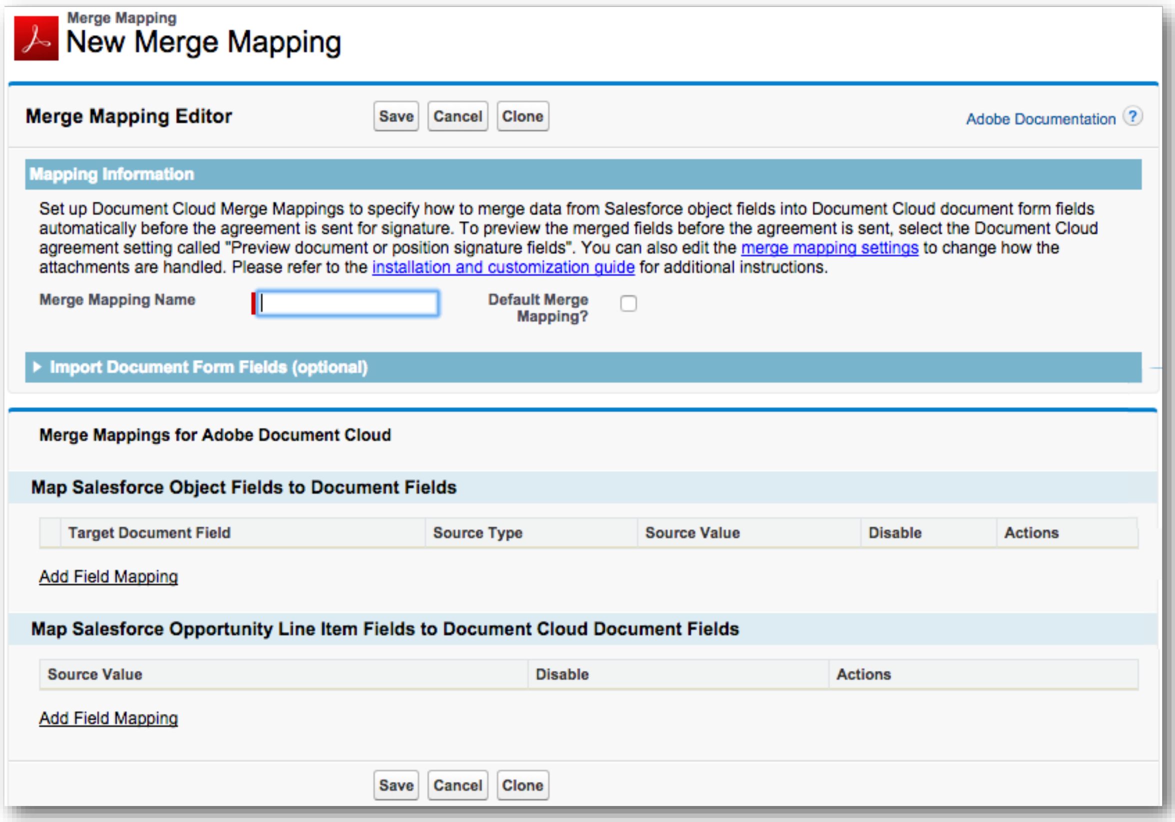
To create a new Merge Mapping, follow the steps below:

1. Select **Adobe Document Cloud** from the Force.com App menu at the top right of the screen
2. Click the **Merge Mappings** tab.

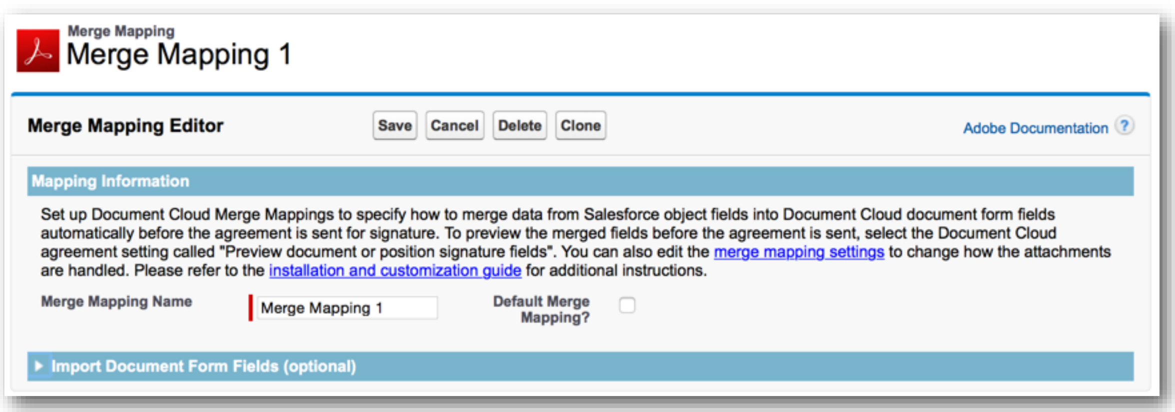
3. In the Merge Mapping Home page, click **New.**



The New Merge Mapping page displays.



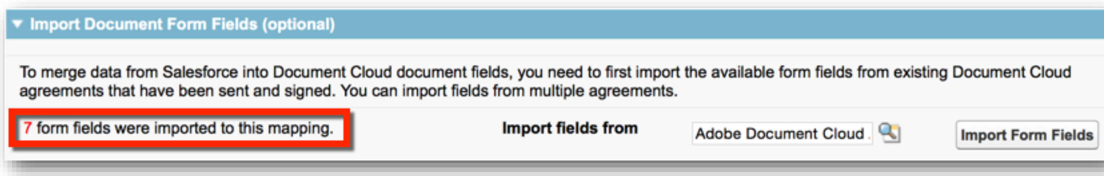
4. In the Mapping Information section, type a name for the mapping and decide whether you'd like it to be the default mapping. If you check 'Default Merge Mapping?,' the mapping will execute by default when sending an agreement for signature.



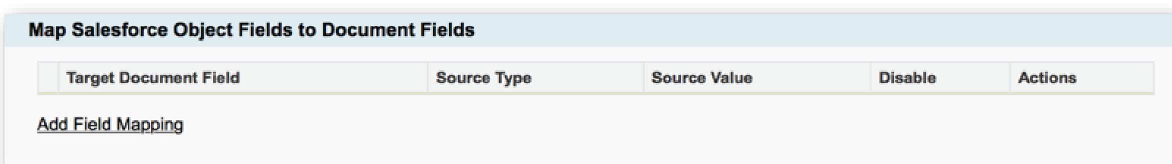
5. To import and map form field names from an existing document, you can select an agreement that was sent for signature and signed. You can import fields from additional agreements to add additional fields. Fields with duplicate names will not be imported twice. To import form fields do the following:
   a) Click the show toggle ( ) to display the *Import Document Form Fields* section.

   b) Select the agreement you would like to import fields from.
   c) Click the **Import Form Fields** button.

   The number of fields imported will be displayed.

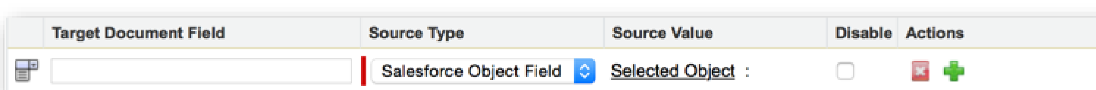


6. In the *Map Salesforce Object Fields to Document Fields* section, you can create a mapping from fields that can be referenced from the eSign services Agreement object (including custom fields). You can also add mapping rules to merge data into eSign services documents.



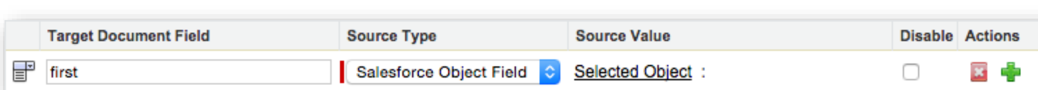
   To create a merge field mapping row, do the following:

   a) Click **Add Field Mapping** to add a new, blank row.

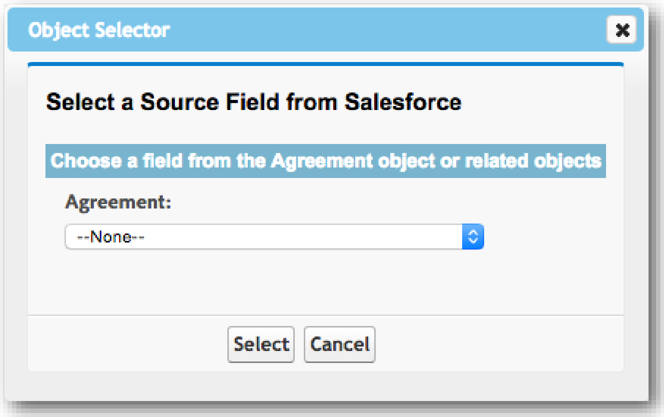


   b) Define the mappings and mapping rules through the following selections:

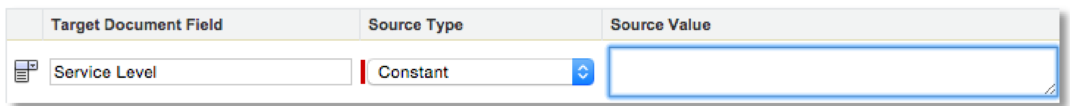
   - **Target Document Field**—If you have imported form fields, you can select these fields. Or you can input a specific field name. Click on the and icons to switch between a text input field and a selectable drop-down displaying the available and imported form field values.
   - **Source Type**—Select either *Salesforce Object Field* or *Constant.*
   - **Source Value**—Depending on the *Source Type* selected, you must specify the following:
     - If the Source Value is *Salesforce Object Field*, you must select a value.



To do this, click **Selected Object** to display the *Object Selector* dialog where you can select the Salesforce source object field.



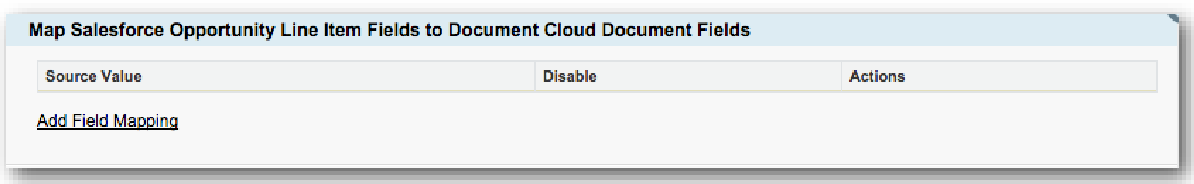
- If the Source Value is *Constant,* you must type a value in the Source Value field.



- **Disable**—If checked, this mapping row will not execute.

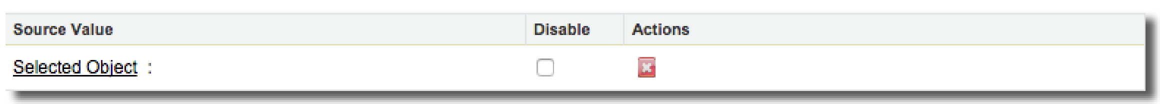
c) Repeat steps a and b to add more mapping rows.

7. In the *Map Salesforce Opportunity Line Item Fields to Document Cloud Document Fields* section, you can add products lists tied to an opportunity.

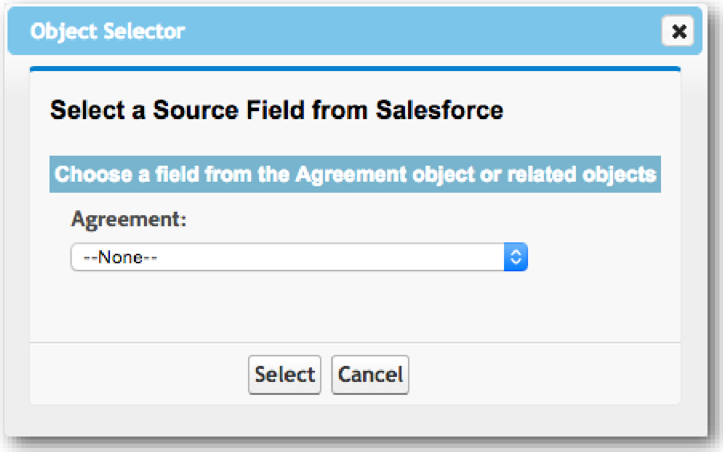


To create a merge field mapping row, do the following:

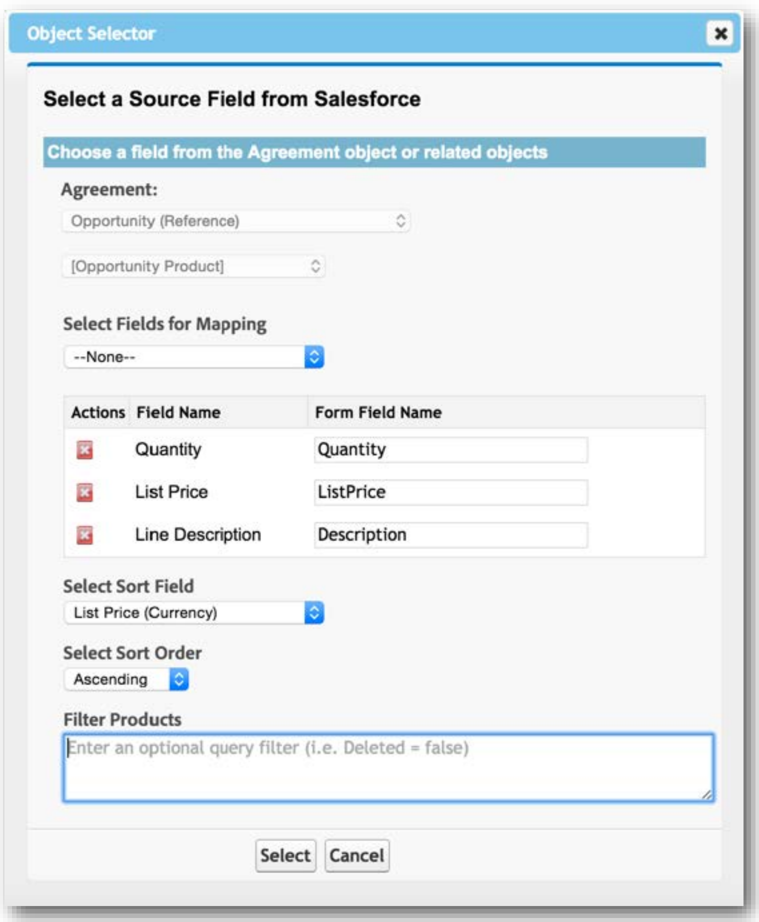
a) Click **Add Field Mapping** to add a new, blank row.



b) Click **Selected Object** to display the *Object Selector* dialog.



c) In the *Object Selector* dialog, select a Salesforce source fields, select Opportunity, Opportunity Product, then add the product attributes, such as quantity, price, and line description, that are included in your agreements. You can also specify the sort field and sort order.



d) Click **Select**.

e) Repeat steps a, b, c and d to add more mapping rows.

8. Click **Save** to save the mapping.

Note: There are Merge Mapping settings that define how file attachments are handled. By default, the original attached document (e.g., a NDA template) will be removed and the merged document will be attached to the agreement record once the agreement is sent. If you want to change the default values, go to the Document Cloud Merge Mapping Settings section of this document for more information.

Using Default and Multiple Merge Mappings

You may create as many Merge Mappings as necessary, one of which may be defined as the default mapping that will be executed whenever an agreement is sent for signature. Only one mapping can be a default mapping.

You may also explicitly specify which merge mapping you'd like to use for an agreement by referencing it in the Agreement's 'Merge Mapping' (echosign_dev1__Merge_Mapping__c) field. You may use a Salesforce workflow or trigger to run any custom business logic to determine which template to use. Please note that you do not need to set that field to point to the default mapping; the default mapping is executed if this field is left blank.

Troubleshooting Merge Mappings

Salesforce fields have validation rules that may cause a mapping to fail. For example, if you map Salesforce email field to an eSign services text field it may fail if the content of the field is not a valid email address.

If a mapping fails for some reason, it logs the error message in the 'Merge Mapping Error' (echosign_dev1__Merge_Mapping_Error__c) field on the eSign services Agreement object. You may expose this field on the agreement page layout or create a simple report in Salesforce to find agreements where mapping errors had occurred. In addition, merge mapping errors will be sent to the owner of the merge mapping by email. Click **Setup** then navigate to **Build | Develop | Custom Settings** then select **Document Cloud Settings** to enable or disable the *Enable Mapping Error Notification* setting that controls email notifications. To enable the 'Merge Mapping Error' field, follow the steps here and drag the field to the page layout.

In addition, you can associate a merge mapping to an agreement template, which can also let you set up other default fields and options for your agreements. (See Agreement Templates for more information.)

Agreement Templates and ‘Send for Signature’ Button (Key Feature)

eSign services Agreement Templates offer an easy way to set up many default values and settings for your agreements ahead of time. You can link an agreement template also to a ‘Send for Signature’ button.

If you choose not to use this feature, skip this section.

About Agreement Templates

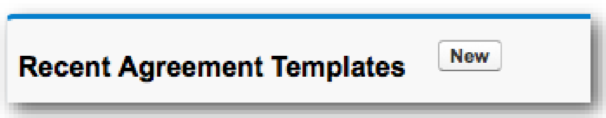
This includes pre-defining agreement fields including name, message, language, signature type, expiration dates, and security options. Also, you can associate a particular data mapping, merge mapping, and object (e.g., Opportunity, Account, Contact, Lead, Opportunity, Contract) to the agreement template. Additionally, you can pre-set the recipient definitions, map fields to agreement fields, and pre-define the file attachments.

In addition, you can also set up a ‘Send for Signature’ button that appears on a related object record (e.g., Opportunity) so that it links to an agreement template by default. Clicking on the button would generate an agreement using an agreement template.

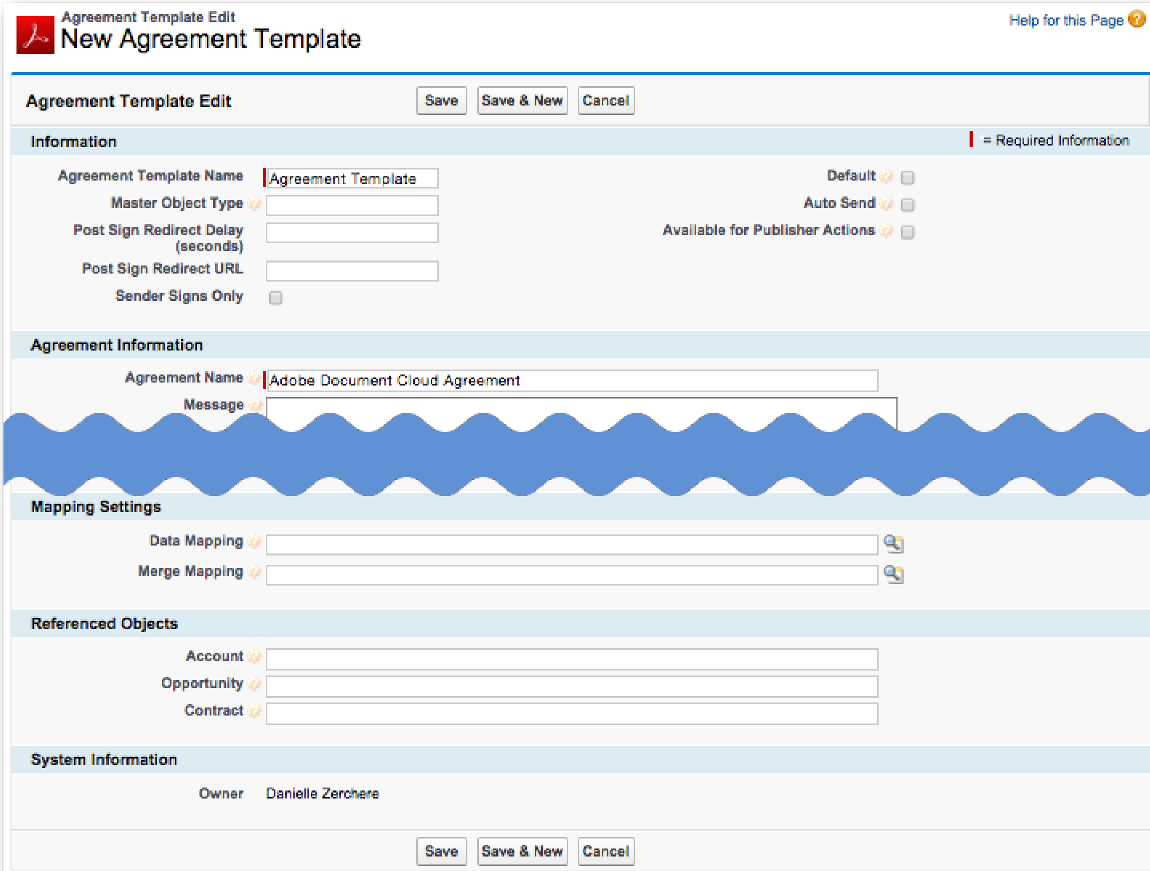
Creating an Agreement Template

To create a new Agreement Template, follow the steps below:

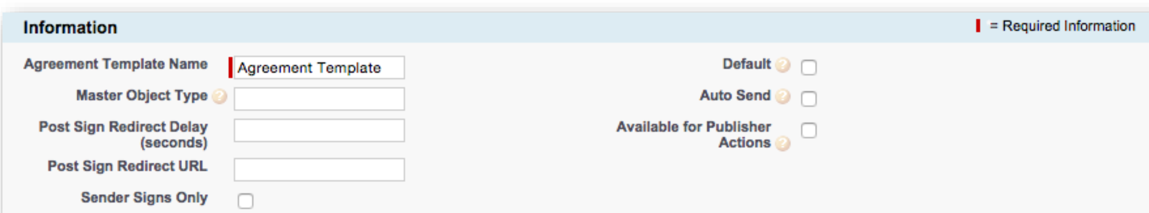
1. Select **Adobe Document Cloud** from the Force.com App menu at the top right of the screen.
2. Click the **Agreement Templates** tab.
3. In the Agreement Templates Home page, click the **New** button.



The New Agreement Template page displays:



4. In the *Information* section, enter or enable the following:



- **Agreement Template Name**—Enter a name for the agreement template.
- **Master Object Type**—Enter the name of the Salesforce object that you want to use as a master reference for some of the optional definitions in the agreement template. For example, you can define Recipients, Field Mappings, or Attachments for the agreement to look up fields and map in the Master Object or data from lookup objects. Examples of a Master Object include *Opportunity*, *Account*, *Contact*, *Lead*, *Opportunity*, or *Contract*. If you have a Master Object defined in the Agreement Template, you should initiate the agreement from a 'Send for Signature' button on the Master Object. See this section for more information about how to enable a default button or create new 'Send for Signature' buttons.
- **Post Sign Redirect Delay (seconds)**—If the Enable Post Sign Options setting is enabled and a Post Sign Redirect URL Is specified (see below), enter the number of seconds that should elapse before executing the redirect.

- **Post Sign Redirect URL—**To automatically redirect the signers of an agreement to a specified URL after they sign, enter a URL. The Enable Post Sign Options setting must be enabled to use this option.
- **Sender Signs Only—**Enable this option to add the "Only I Sign" functionality to the template. The Enable Sender Signs Only setting must be enabled to use this option. Depending on your requirements, this option can be set to read only using the *Read Only Sender Signs Only* setting.
- **Default**—Enable this option if you want to set this as the Default agreement template for your new agreements. You can also define a specific agreement template to associate with other agreements, which can override the default agreement template. For example, you can create a custom 'Send for Signature' button for the Account object that is associated with a specific agreement template. See this section for more information about how to create custom buttons.
- **Auto Send**—Enable this option if you have automated workflows that you want to use to trigger the sending of agreements or if you would like to automatically send an agreement after a user clicks the 'Send for Signature' button from a Salesforce record. For 'Auto Send' to work, you must have at least one recipient and one attachment defined in the agreement template.
- **Available for Publisher Actions**—If you have enabled Chatter Publisher Actions on your Org, then you can check this box to enable this Agreement Template. The eSign services Chatter Publisher Action allow users to send agreements from Chatter. Check this box to enable this agreement template for the eSign services Chatter Action for any of the following master objects: Contact, Account, or Opportunity. For example, if the Master Object is Opportunity, then checking this box will enable users to send with this agreement template from any Opportunity Chatter feed. If you leave the master object blank, you can enable the agreement template on the Home page Chatter feed. Learn more about enable the eSign services Chatter Publisher Action.

5. In the *Agreement Information* section, enter or select the following:

- **Agreement Name**—Enter a custom name or accept the default.
- **Message (Optional)**—Enter a custom message.
- **Signature Type**—Select a signature type and recipient language. The options are as follows: *None, e-Signature*, or *Written Signature*.
- **Language**—Select the language for the send email.

Note: In the text fields, such as Agreement Name and Message, of an Agreement Template, you can optionally use Salesforce variables as part of the definition to dynamically generate this data for the agreement. For example, this is beneficial if you want to customize the agreement name and message to recipients each time the agreement is generated. See the examples below.

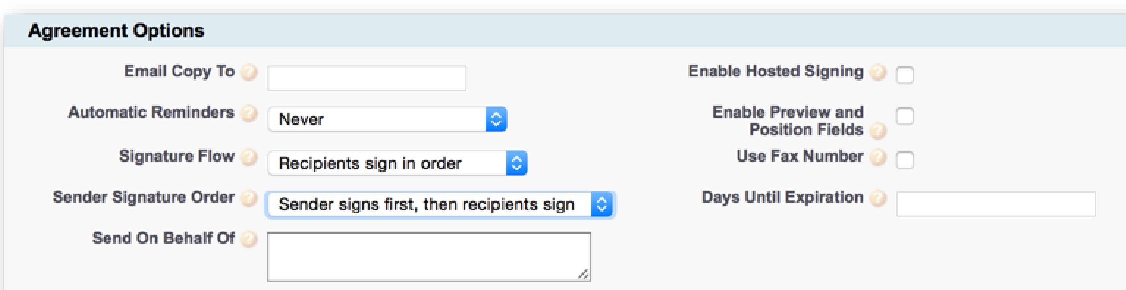
Example 1:
Master Object: Opportunity
Agreement Name: Acme Corp Agreement - {!Name}
Message:
Here is the estimate for:
Account: {!Account.Name}
Amount: {!Amount}
Please sign the attached agreement.

Thanks, {!Owner.Name}
The following is the result when the Agreement gets generated from a specific Opportunity:

Example 2: Custom Object as Master Object
Custom Lookup Field on the Opportunity: Student__c
Agreement Template Definition: AgreementTemplateProcess
Master Object: Student__c
Agreement Name: Student Agreement - {!Name}
Message:
Hello {!Student__r.Student_Name__c}
Please sign the attached application.

Thanks, {!Account.Owner.Name}

6. In the *Agreement Options* section, enter, select, or enable the following:



- **Email Copy To**—Enter the email addresses to whom the agreement should be sent.

  Note: In text fields you can optionally use Salesforce variables such as {!Id} or {!Account.Name} that reference the Master Object defined in the Agreement template. For example, you can type in {!Owner.Email} for the **Email Copy To** field or {!OwnerId} for the **Send On Behalf Of** field. If the Master Object was 'Opportunity', then the variable {!OwnerId} would represent the owner of the Opportunity and the variable {!Owner.Email} would represent the email of the owner of the Opportunity.

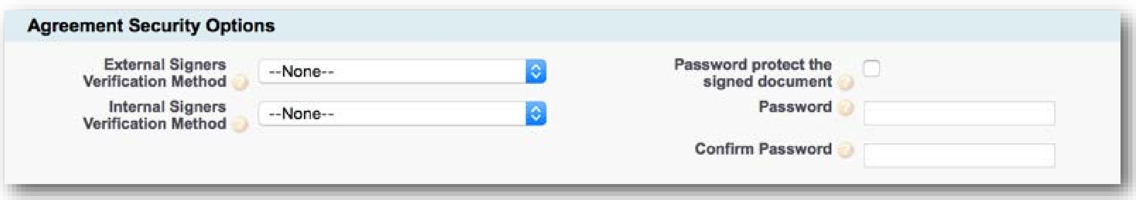
- **Automatic Reminders**—Select an option for automatic reminders. The options are *Never*, *Every Day, Until Signed*; or *Every Week, Until Signed*.
- **Signature Flow**—Select an option for the signing order. The options are *None*, *Recipients sign in order* or *Recipients sign in any order*.
- **Sender Signature Order**—Select an option for when the sender should sign. The options are *None*; *Recipients sign first, then sender signs*; or *Sender sign first, then recipients signs.*
- **Send On Behalf Of**—The agreement will be send behalf of the user specified by this field.

  Note: If you are using the 'Send on Behalf of' functionality, make sure to enable it first by following these instructions.

- **Enable Hosted Signing**—Enable to facilitate hosted, in-person signing if the signer is available.
- **Enable Preview and Position Fields**—Enable this option to allow you to preview the agreement and to drag-and-drop form fields on to it before sending it out for signature.
- **Use Fax Number**—Enable to send an agreement to the fax number of a contact, lead, or user when a written signature is preferred.
- **Days Until Expiration**—Enter the number of days until the agreement expires.

  Note: The number of days entered is added to the current date when the agreement record is generated from the agreement template to dynamically calculate the expiration date.

7. In the *Agreement Security Options* section, enter, select, or enable the following:



- **External and Internal Signer Verification Method (Optional)**—Select a verification method for signers in your eSign services account and signers outside of your eSign services account. The options are *None, Password to sign agreement, Knowledge based authentication,* or *Web identity authentication*.

  Note: To assign a signer identity verification method to an individual recipient, you need to specify that in the Recipients section, explained below.

- **Password protect the signed document (Optional)**—Enable this option to encrypt the PDF that is sent to signers.
- **Password and Confirm Password—**Enter the password that will be required to open the PDF of the signed agreement.

8. In the *Mapping Settings* section, you can optionally specify which data mapping or merge mapping or both to automatically run when sending agreements using this agreement template.

- **Data Mapping**—Select a data mapping to be used to map inputs from a signed agreement back into Salesforce.

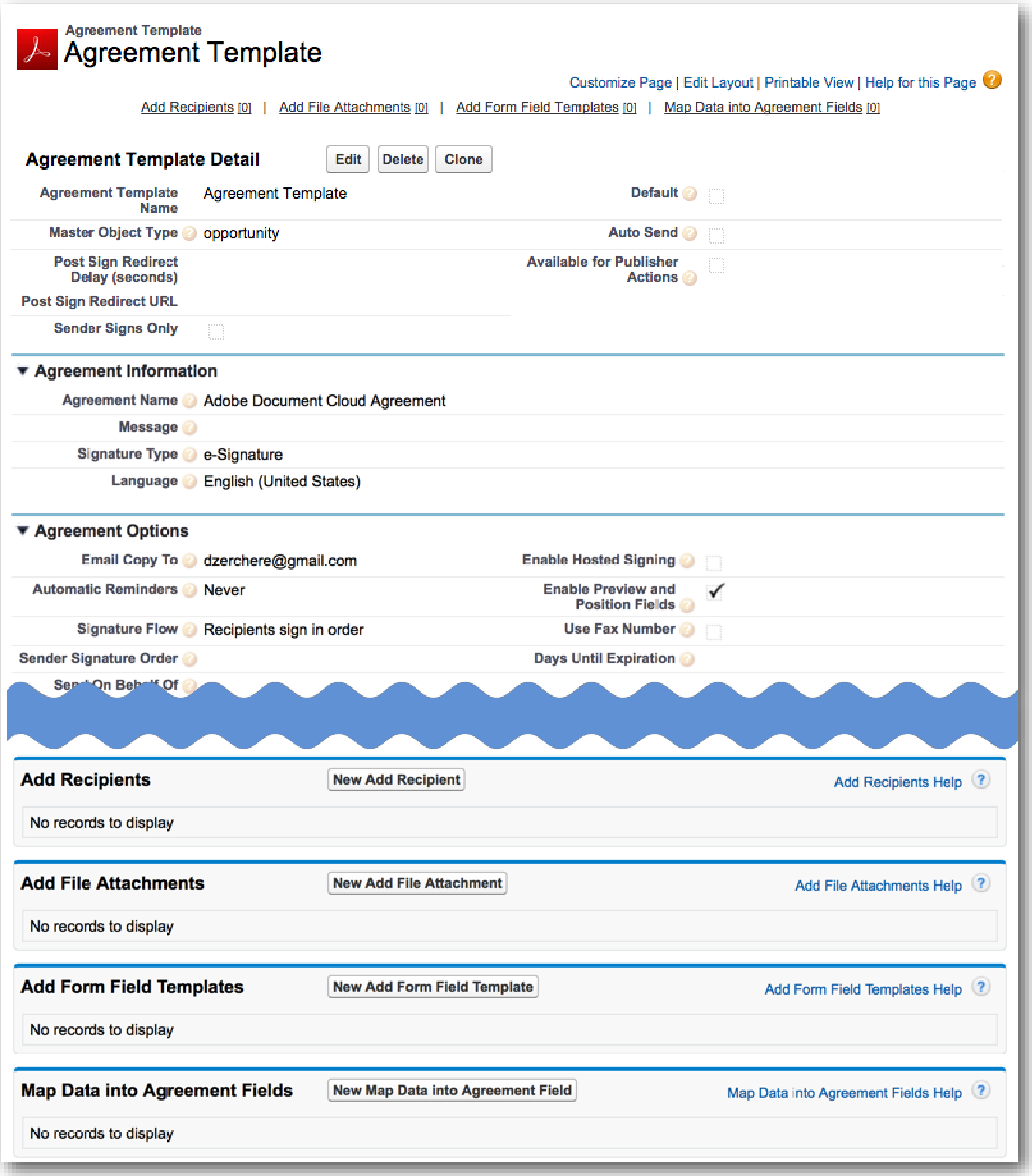
- o **Merge Mapping**—Select a data mapping to merge Salesforce fields into an agreement before sending it.

9. In the *Referenced Objects* section, you can associate an Account, Opportunity, or Contract to this agreement template by typing in the specific ID or entering a Salesforce variable such as {!Id}. This will allow your Agreements list in the referenced object to contain agreements sent with this agreement template.

10. Click **Save** to save the template and display the Agreement Template page.

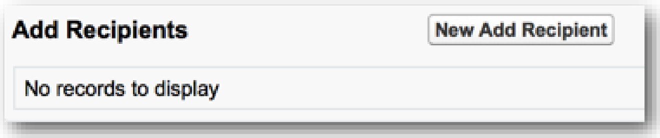
Adding Recipients, Attachments, and Form Field Templates to Agreement Templates

In the Agreement Template page, you can further customize your agreement template by specifying recipients, attachments, and form field templates.

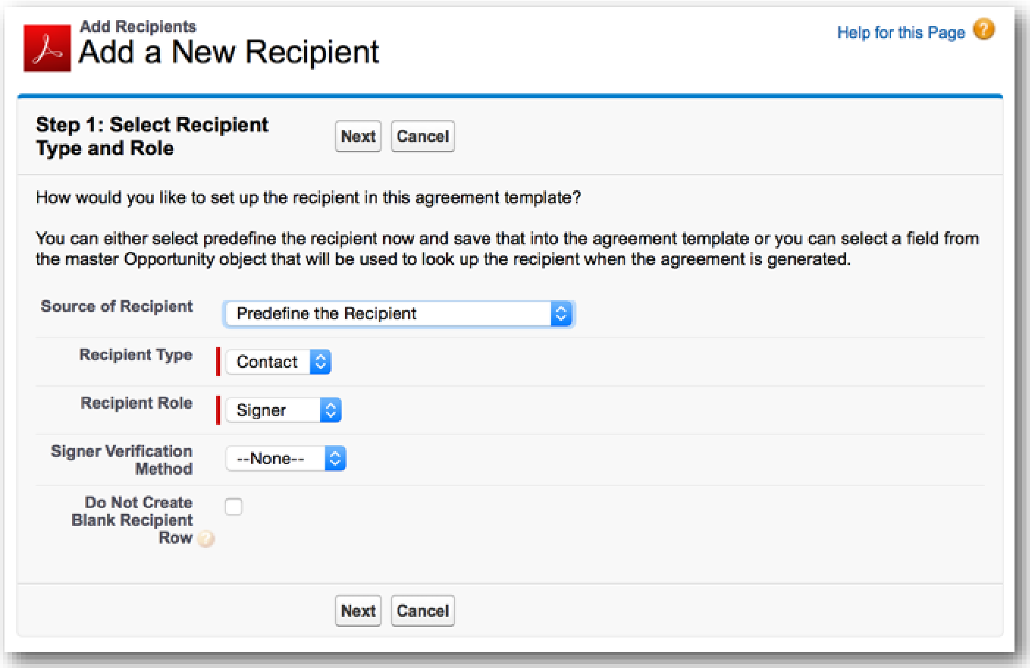


1. To add recipients to the Agreement Template, do the following:

   a) In the *Add Recipient* section, click the **New Add Recipient** button.



   The *Add a New Recipient* page displays.



   b) In "Step 1: Select Recipient Type and Role", select the following:

   - **Source of Recipient**—From the drop-down, select one of the following options for specifying the recipient:

     - Predefine the Recipient
     - Look Up Based on Master Object Field
     - Runtime variable

     If the Master Object selected is Account or Opportunity, you can also select the following:

     - <***Account or Opportunity***> Primary Contact Role
     - <***Account or Opportunity***> Contact Role
     - All <***Account or Opportunity***> Contact Roles

     Note: If you select *Opportunity Primary Contact Role* or *Account Primary Contact Role*, the recipient will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. (See Creating an Agreement Template for more information.) Step 2, Specify the Recipient (see below) is not required if the *Primary Contact Role* is selected.

   - **Recipient Type**—From the drop-down, select one of the following options: *Contact, Lead, User,* or *Email.*
   - **Recipient Role**—From the drop-down, select one of the following options: *Signer* or *Approver*.

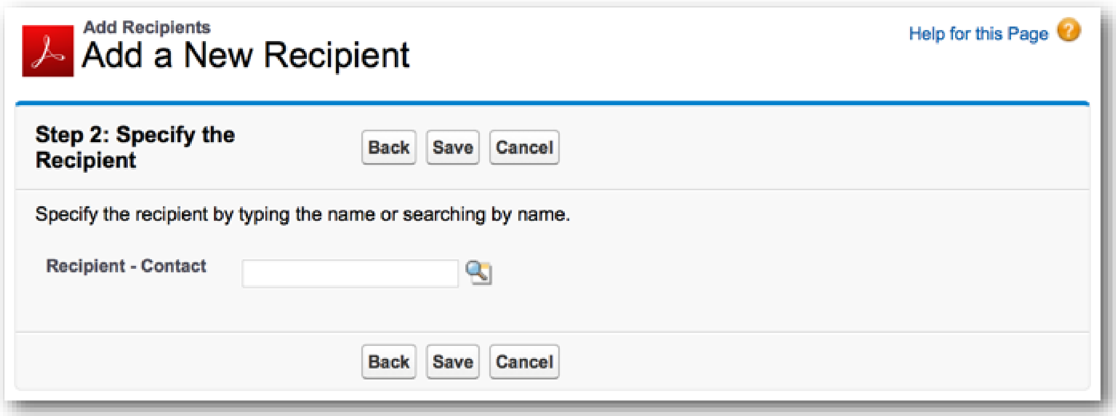
- **Signer Verification Method**—From the drop-down, select one of the following options: *None, Email, Password, Social, KBA,* or *Phone.*

Note: Make sure your eSign services account is enabled for these signer verification methods in order to use them in Salesforce.

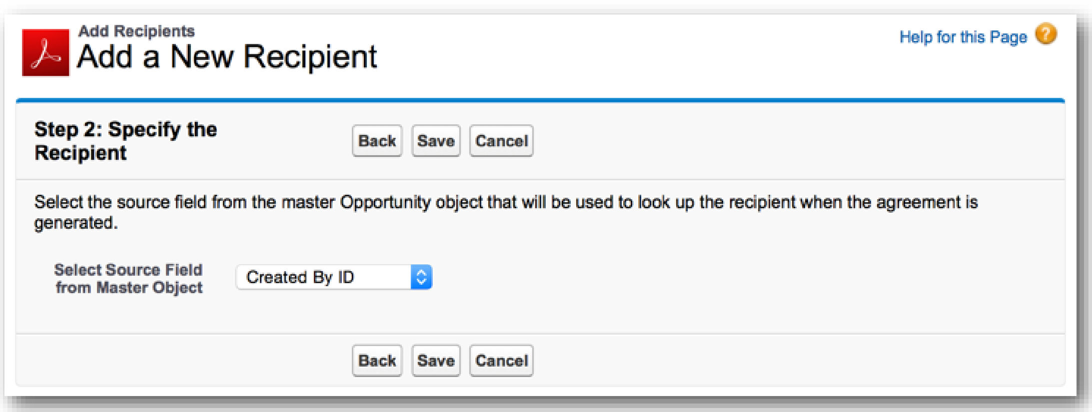
c) Click the **Next** to proceed to the next step.

d) In "Step 2: Specify the Recipient", do the following:

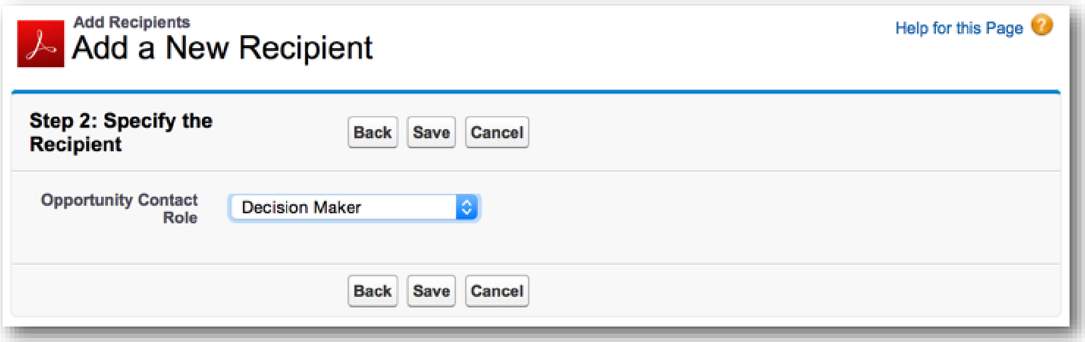
- If you selected *Predefine the Recipient* in Step 1 b) above, select a recipient in the **Recipient - <*Recipient Type*>** field.



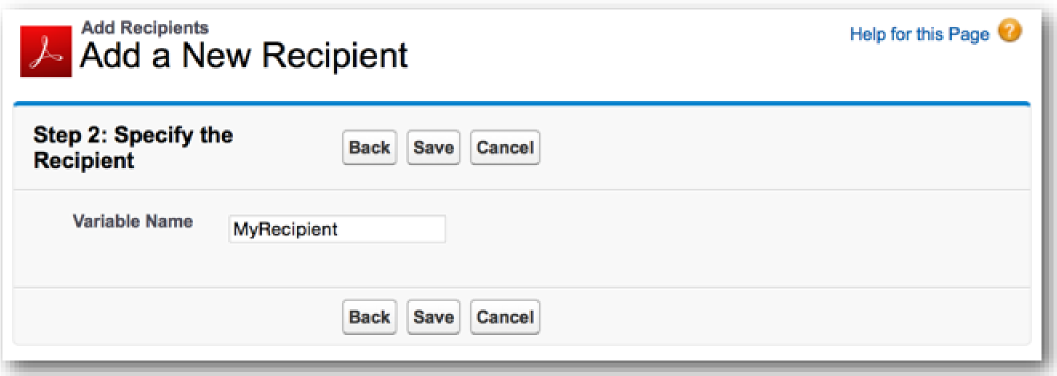
- If you selected *Look Up Based on Master Object Field* in Step 1 b) above, then the recipient will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. For example, the master object may be 'Opportunity'. In this screen, select the source field from the Master Object (e.g., Opportunity) that will be used to look up the recipient. For example, you can populate the Recipient field with the User who created the Opportunity or who last updated the Opportunity.



- If you selected *Opportunity Contact Role* or *Account Contact Role*, then the recipient will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. In this case, 'Opportunity' or 'Account' should be entered as the master object. In this screen, select the Opportunity/Account Contact Role that will be used to select the contact as the recipient in the agreement. For example, you can populate the Recipient field with the Contact who has the Decision Maker role for the Opportunity or Account.



- If you selected *Runtime variable* in Step 1 b) above, you can specify a Recipient ID in SFDC URL when specifying a recipient for the agreement template. To do this, you must specify the variable here (e.g., myRecipient).



Then in the 'Send for Signature' custom button, append the runtime variable parameters in this way:
/apex/echosign_dev1__AgreementTemplateProcess?masterId={!Opportunity.Id}&myRecipient=00b500000018J7e&myAttachment=00b500000018J7e

The ID for recipient is a Contact or Lead or User record ID.

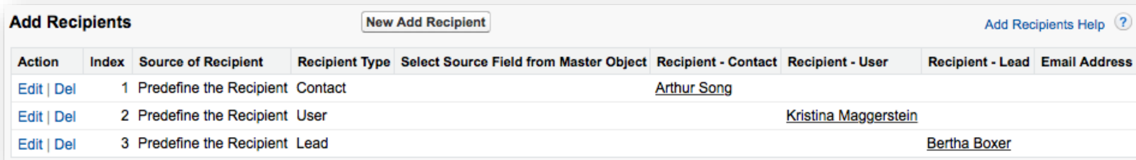
For an Email recipient that is not a record in Salesforce, the variable would have the actual email address, for example:

/apex/echosign_dev1__AgreementTemplateProcess?masterId={!Opportunity.Id}&myRecipient=amy@globalcorp.com
Read more in the next section about creating 'Send for Signature' buttons.

You can also set up placeholder recipients that have a Recipient Type but are not specifically defined until the sender defines the specific recipient when the agreement is generated. You do that by leaving the *Variable Name* blank.

e) Click **Save** to save your recipient, then repeat the above steps to add additional recipients.

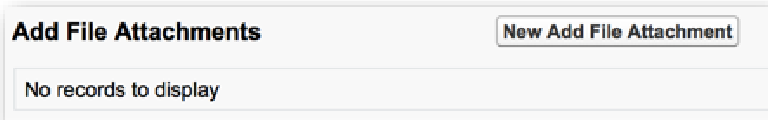
The following shows three predefined recipients (a Contact, a User, and a Lead) added to the Agreement template.



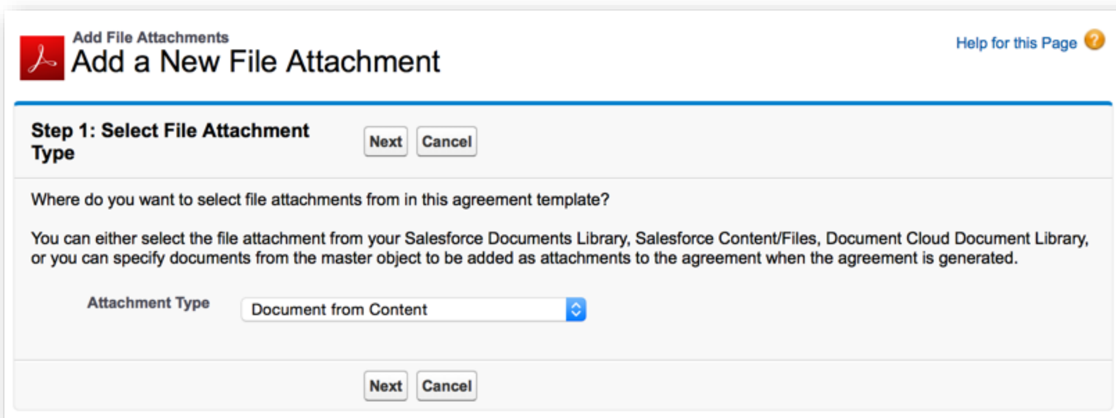
Action	Index	Source of Recipient	Recipient Type	Select Source Field from Master Object	Recipient - Contact	Recipient - User	Recipient - Lead	Email Address
Edit | Del	1	Predefine the Recipient	Contact		Arthur Song			
Edit | Del	2	Predefine the Recipient	User			Kristina Maggerstein		
Edit | Del	3	Predefine the Recipient	Lead				Bertha Boxer	

2. To add Attachments to the Agreement Template, do the following:

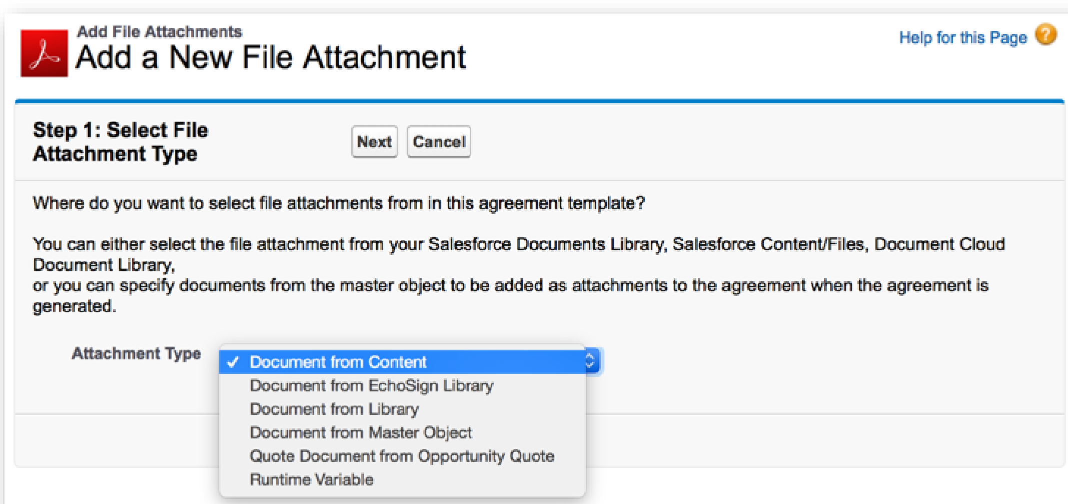
a) In the *Agreement Template* page, click the **New Add File Attachment** button.



The *Add a New File Attachment* page displays.



b) In "Step 1: Select File Attachment Type", select an Attachment Type from the drop-down.



The options are as follows:

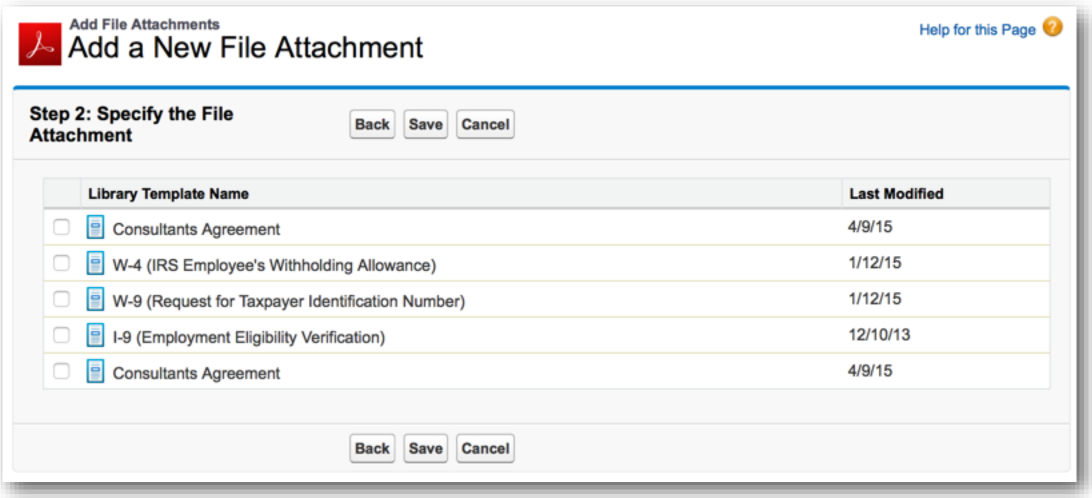
- Document from Content
- Document from EchoSign Library
- Document from Library (Salesforce library)
- Document from Master Object
- Runtime variable

If the Master Object selected in Step 1 b) above is Opportunity or Quote, you can also select the following:

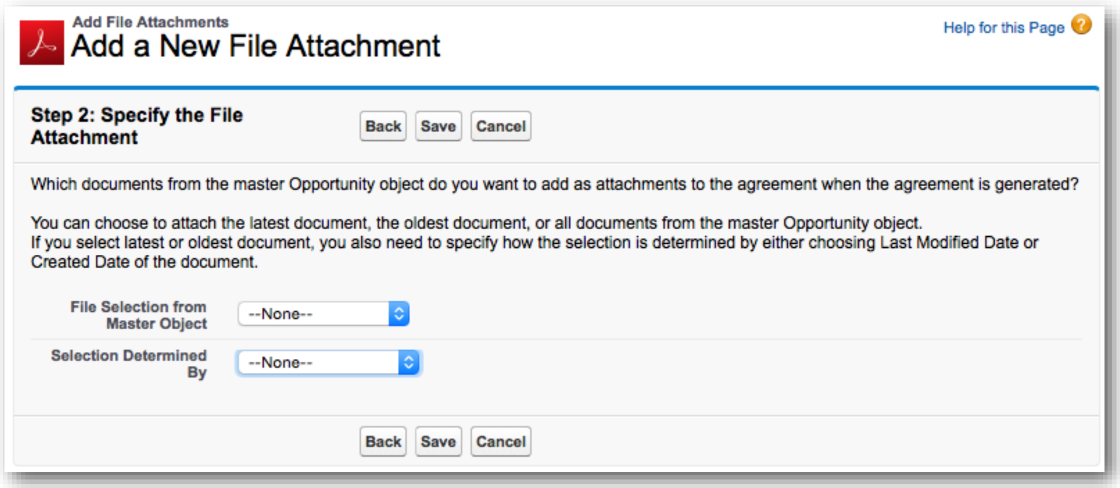
- Quote Document from Opportunity Quote **or** Quote Document from Master Quote (if Master Object is Quote)

c) Click the **Next** to proceed to the "Step 2: Specify the File Attachment".

- If you selected *Document from EchoSign Cloud Library* in Step 2 b) above, then simply select from the eSign services document templates in the next step.



- If you selected *Document from Library* in Step 2 b) above, then select from the Salesforce documents in the next step.
- If you selected *Document from Content* in Step 2 b) above, then select from the Salesforce Content or Files documents in the next step.
- If you selected *Document from Master Object* in Step 2 b) above, then the document will be looked up at the time the agreement is generated based on the master object you set up in this agreement template.

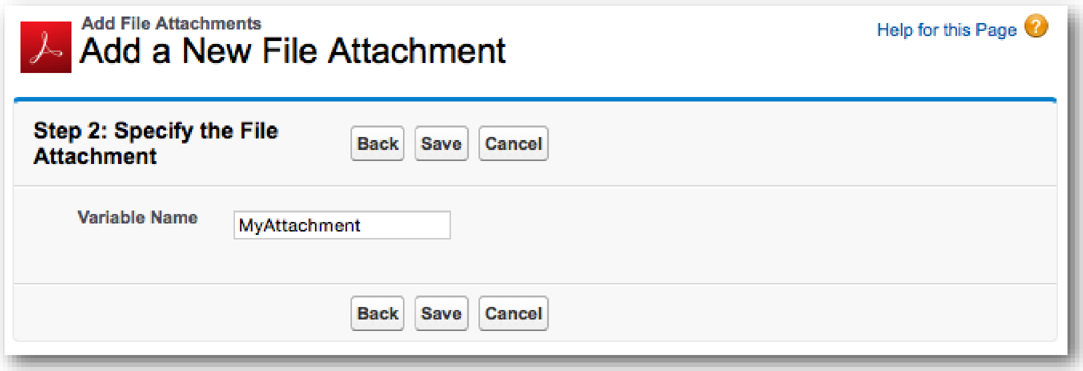
  You must specify the criteria to be used to determine which file attachment is used:

  - File Selection from Master Object (e.g., Opportunity)
    - Latest Document
    - Oldest Document
    - All Documents
  - Selection Determined By
    - Last Modified Date
    - Created Date

- If you selected *Quote Document from Master Quote* or *Quote Document from Opportunity Quote* then the document will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. In this case 'Quote' is the master object that you need to enter for this agreement template. When you do this the quote PDF(s) generated from the Opportunity will be used as the file attachment(s). In the next screen, select the criteria by which your file attachment will be determined:

  - File Selection from Master Object (e.g., Opportunity or Quote)
    - Latest Document
    - Oldest Document
    - All Documents
  - Selection Determined By:
    - Last Modified Date
    - Created Date

- If you selected *Runtime variable* in Step 2 b) above, you can specify an Attachment ID on the Master object and Recipient ID in the SFDC URL when specifying an attachment for the agreement template. You will need to specify the variable here (e.g., myRecipient or myAttachment).



Then in the 'Send for Signature' custom button, append the runtime variable parameters in this way:

/apex/echosign_dev1__AgreementTemplateProcess?masterId={!Opportunity.Id}&myRecipient=00b500000018J7e&myAttachment=00b500000018J7e

For Attachment ID, it is an ID of an attachment on the master object.

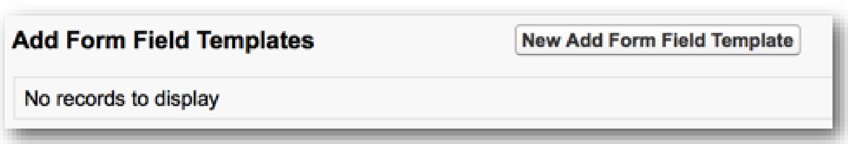
Read more in the next section about creating 'Send for Signature' buttons.

When you have a master object such 'Quote', you will need to set up a custom 'Send for Signature' button on the Quote object so that the agreement template documents you specified would be attached accordingly.

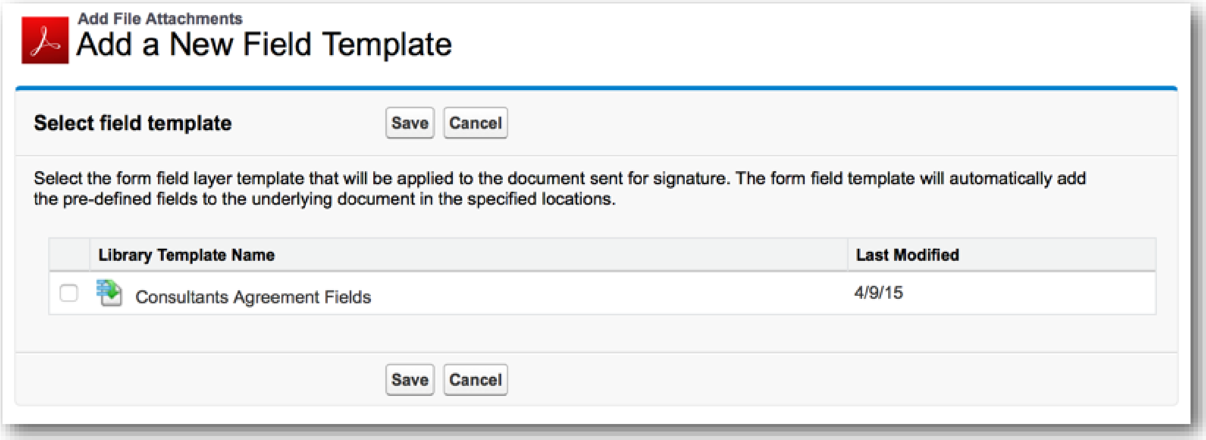
- Click **Save** to save your attachment, then repeat the above steps to add additional recipients.

3. In the *Agreement Template* page, click the **New Add Form Field Template** button.

Note: Form field templates can be created in eSign services to specify field locations and field attributes. From Salesforce, you can specify form field templates to be used in your agreement template. They can be applied over and over again on common business documents to specify the fields.



The *Add a New File Attachment* page displays.



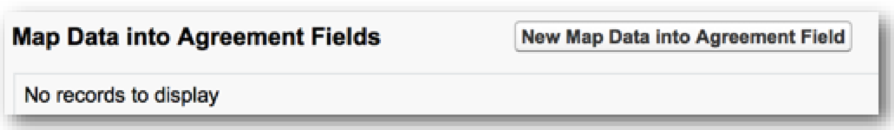
a) In the Add a New Field Template page, select the template to be used.

Note: Currently only one form field template can be selected per transaction but it can be used on more than one document in the transaction. For example, if your form field template is 10 pages, you can apply it on 2 documents that add up to at least 10 pages in length.

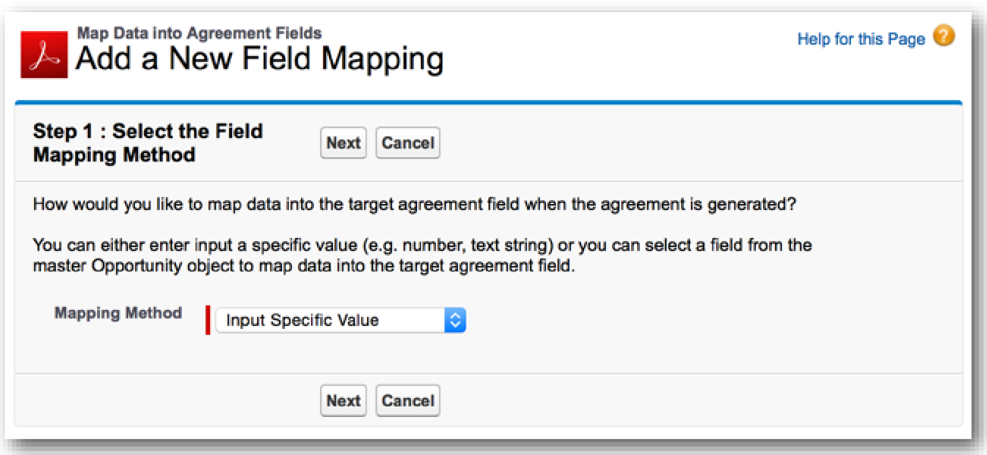
b) Click **Save** to save your form field template selection.

4. To map data into agreement fields in the Agreement Template, do the following:

a) In the *Map Data into Agreement Fields* section, click the **New Map Data into Agreement Fields** button.



The *Add a New Field Mapping page* displays.



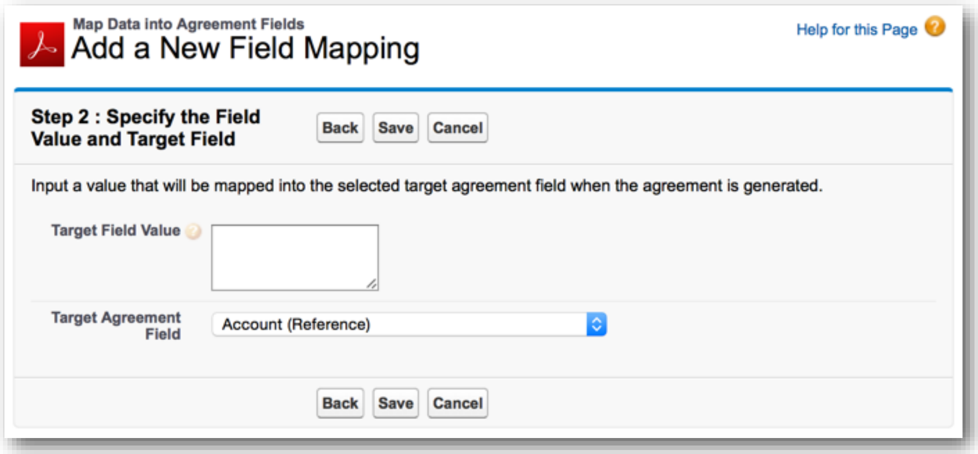
b) In "Step 1: Select the Field Mapping Method" of the Add a New Field Mapping page, select one of the following mapping methods:

- Input Specific Value
- Select Master Object Field

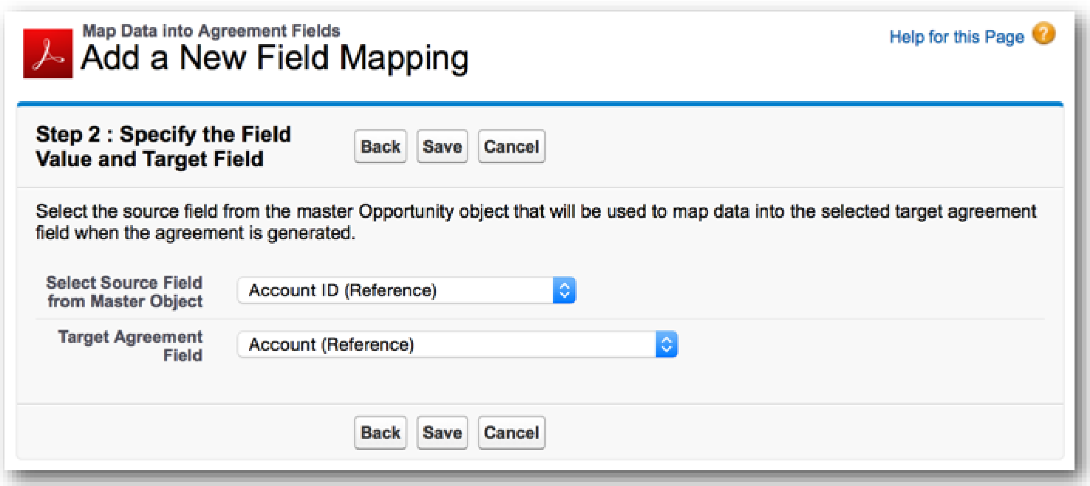
c) Click **Next** to Continue.

d) In "Step 2: Specify the Field Value and Target Field of Add a New Field Mapping", do one of the following:

- If you selected *Input Specific Value* as the mapping method in Step 4 b) above, enter a *Target Field Value* and select a *Target Agreement Field* that data will be mapped into when the agreement is generated.



- If you selected *Select Master Object* as the mapping method in in Step 4 b) above, then the field value will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. For example, if the Master Object the master object may be 'Opportunity'. In the next screen, select the source field from your master object (e.g., Opportunity) and also select the target Agreement object field where the data will be mapped.



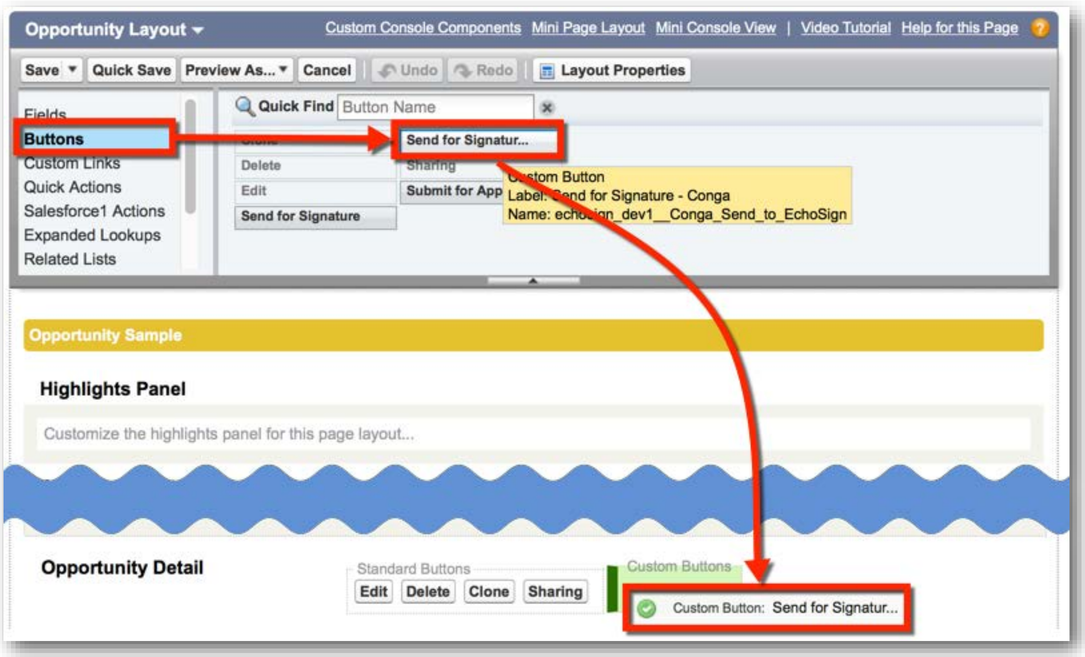
e) Click **Save** to save your field mapping.

Enabling the ‘Send for Signature’ Button

The ‘Send for Signature’ button is associated with the default agreement template or with any specific agreement template that you configure. By default the eSign services for Salesforce integration includes a ‘Send for Signature’ button that you can add to your Opportunity, Account, Contact, Lead, or Contract page layouts. You can also create multiple custom ‘Send for Signature’ buttons that can be added to other objects and associated with different agreement templates.

Here is an example of how to enable the ‘Send for Signature’ button for the Opportunity object:

1. Click **Setup** then navigate to **Build | Customize | Opportunities | Page Layouts.**
2. Click the **Edit** Action for the Opportunity Layout.
3. Drag the Button ‘Send for Signature’ from the top section to the ‘Custom Buttons’ box in the Opportunity Detail section.

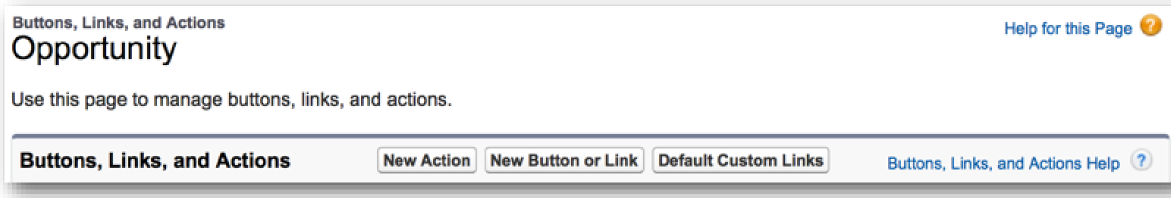


Creating Custom 'Send for Signature' Buttons

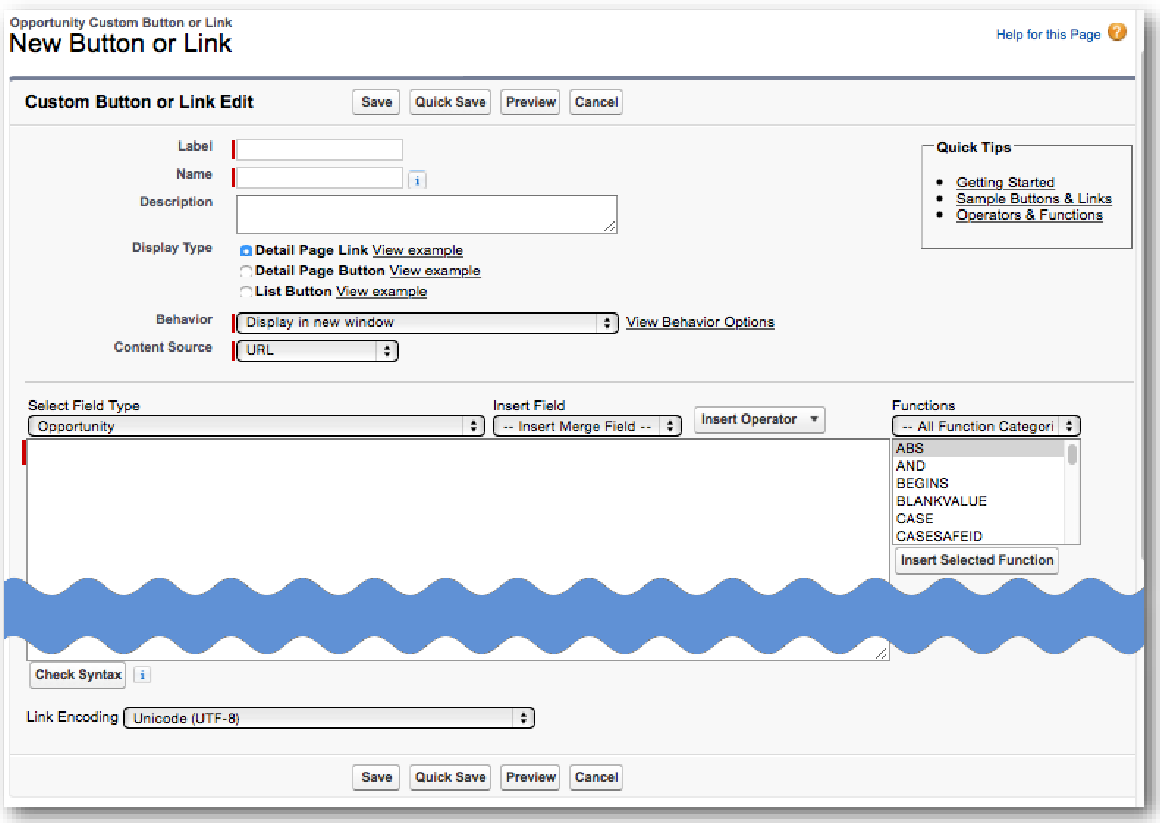
You can create custom 'Send for Signature' buttons for other objects. You can label the button to meet your needs.

Here is an example of how to create a custom 'Send for Signature' button for the Opportunity object:

1. Click **Setup** then navigate to **Build | Customize | <*Object*> | Buttons, Links, and Actions** (where **<*Object*>** is Accounts, Contacts, Leads, or Contracts). You can label the button to meet your needs.
2. In the *Buttons, Links, and Actions* page, click the **New Button or Link** button.



The *Custom Button or Link Edit* page displays.

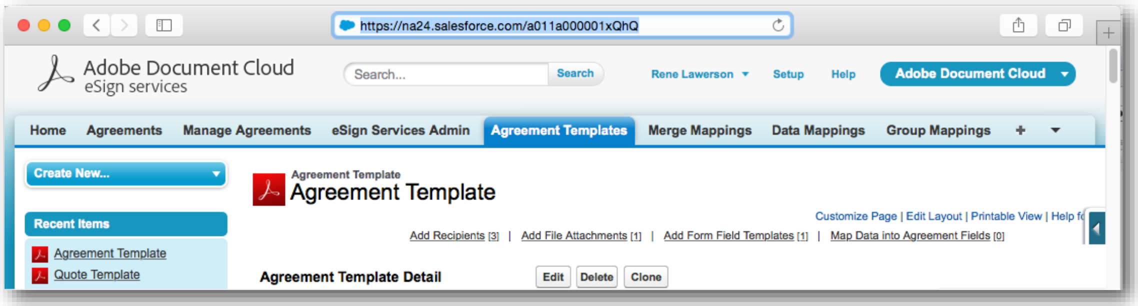


3. You can copy what was set up for the default Opportunity button (see screenshot below) but will need to replace the Object ID variable at the end of the path with the Object ID variable that you want to add: /apex/echosign_dev1__AgreementTemplateProcess?masterid={!Opportunity.Id}

   (Optional) Associate a specific Agreement Template to button:

   o If you want to associate a specific Agreement Template for a specific 'Send for Signature' button, then the button path should be:

/apex/echosign_dev1__AgreementTemplateProcess?masterid={!Object.Id}&templateId=a011a000001xQhQ where templateId should be set to the specific ID of the agreement template that is to be used. If this value is not set, then the default agreement template will be used. You can get the templateId from the URL of the agreement template page:



(Optional) After button is clicked, send the user to a different page than the agreement page using retURL parameter.
Example: You can define a 'Send for Signature' button so that when clicked, it will bring the user to a specified URL or back to the record instead of going to the Agreement page. To define this button, use this string as an example:

/apex/echosign_dev1__AgreementTemplateProcess?masterid={!Opportunity.Id}&retURL=/{!Opportunity.Id}

(Optional) After button is clicked, trigger an onLoadAction for 'Send'

Example: You can define a 'Send for Signature' button so that when clicked, it will bring the user to the agreement page and after the page loads, the agreement will be 'Sent' without additional user intervention. To define this button, use this string as an example:

/apex/echosign_dev1__AgreementTemplateProcess?masterid={!Opportunity.Id}&onloadAction=Send

To learn more about onLoadActions, see onLoadActions. Alternatively, you can map the 'Send' value to the 'On Load Action (Picklist)' field on the Agreement record. See Map Date to Agreement Fields for information on how to define this mapping.

4. Click the **Save** button.

After creating the custom button, go to the Page Layout for that object and add it to the page similar to the steps mentioned above for the Opportunity example. (See Enabling the 'Send for Signature' Button for more information.)

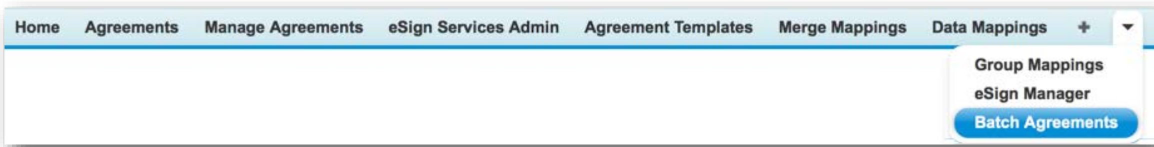
Working with Agreements In Batch (Key Feature)

Create Agreements in Batch

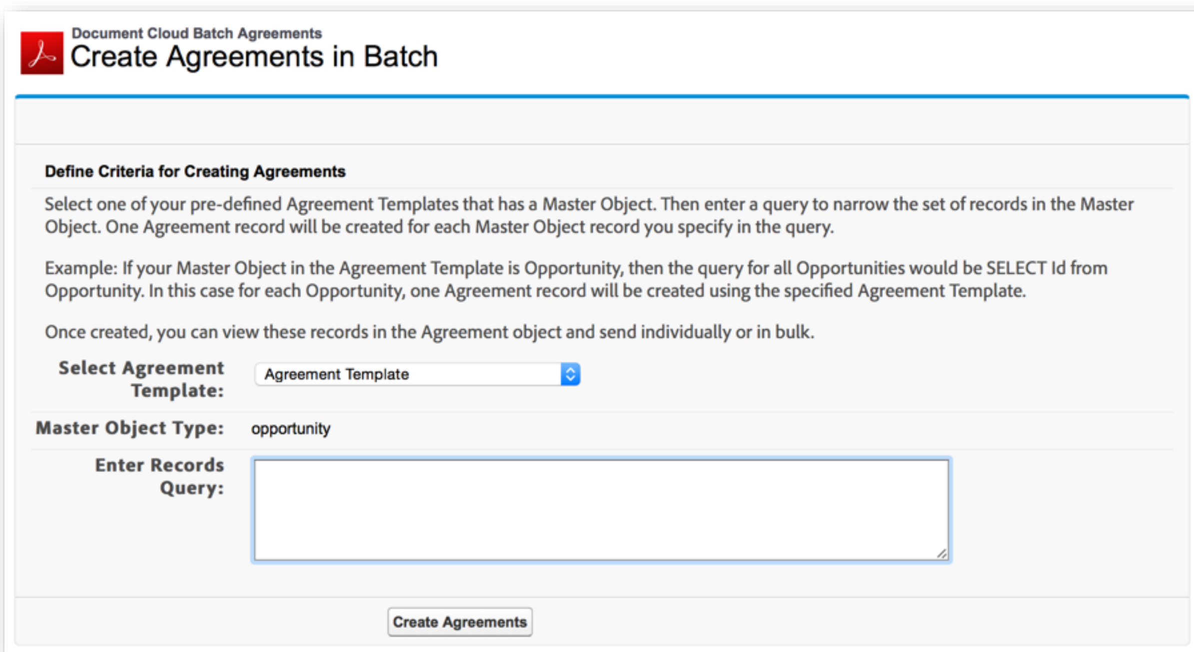
You can create agreement records in batch using the Batch Agreements tab. You can select which Agreement Template to use, then enter a query to narrow down the records for the master object. When you click on the Create Agreements button, one agreement record will be created for each these queried records based on the Agreement Template you specify.

To create agreements in batch:

1. Select **Adobe Document Cloud** from the Force.com App menu at the top right of the screen.
2. Click the **Batch Agreements** tab. If the tab is not displayed, use the tab drop-down at the right.



The *Create Agreements in Batch* page displays.



3. From the *Select Agreement Template* drop-down, select the agreement template to be used to create the batch agreements. The Master Object Type is populated based on the template selected.
4. In the *Enter Records Query* box, enter a query to narrow down the list of records that will be used to create an agreement record. The following are examples of queries.

   Select all opportunities

   - SELECT Id from Opportunity

   Select all leads which came from phone inquiries from Acme corp:

- SELECT Id from Lead where LeadSource = 'Phone Inquiry' and Email LIKE '%acme.com'

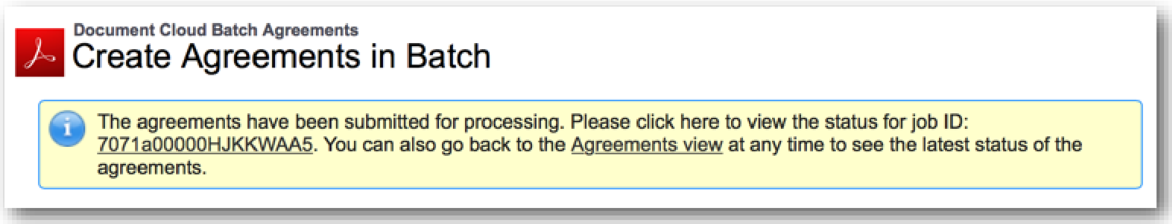
Select all contacts under accounts of type Prospect, created since yesterday and who have not opted out of emails.

- SELECT Id from Contact where Type = 'Prospect' and CreateDate > YESTERDAY and HasOptedOutOfEmail = false

Select all leads from a 2014 Dreamforce campaign

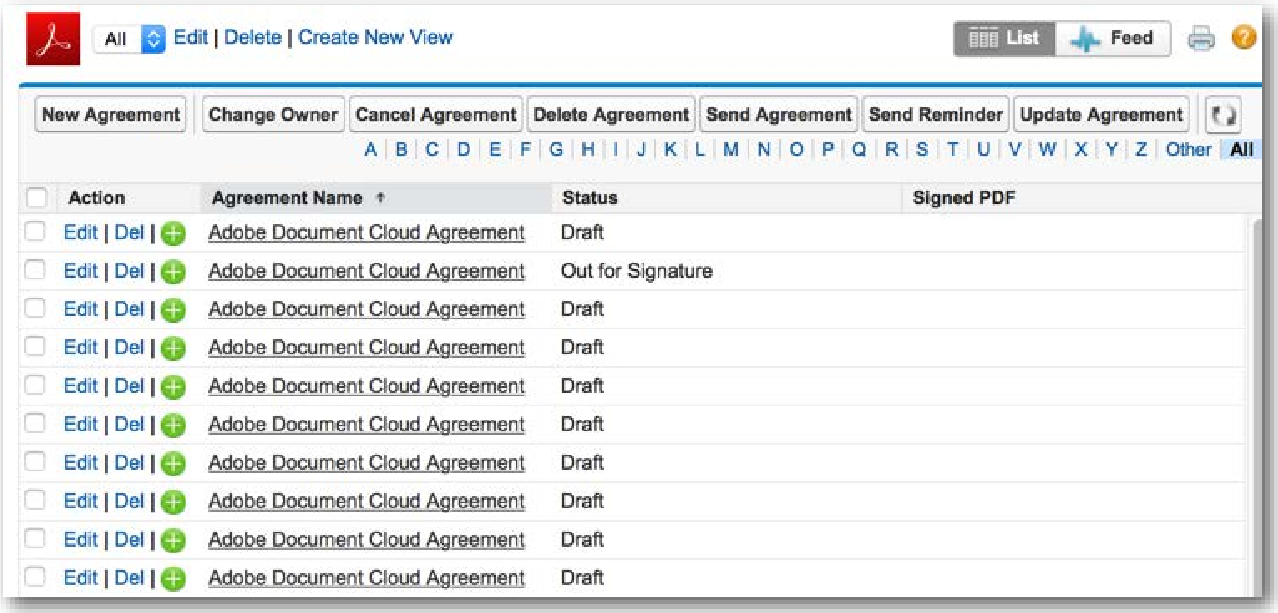
- SELECT Id from Lead where Campaign.Name = '2014 Dreamforce Campaign '

5. Click the **Create Agreements** button. A message about the batch submitted displays.



Once created and submitted, you can view the agreements in the Agreement object list view by clicking the Agreements tab.

Click the **Go** button to display the list.

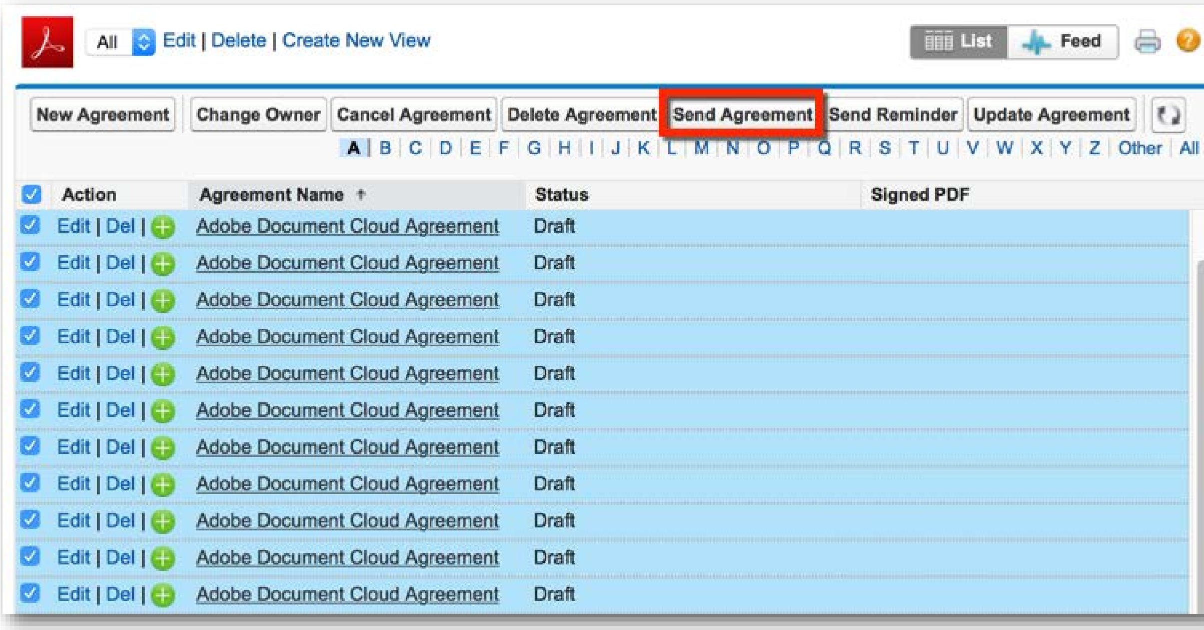


Send and Manage Agreements in Batch

In the Agreement object list view, you now have the option to take batch actions (200 at a time on any agreement record). These actions include:

- Change Owner
- Cancel Agreement
- Delete Agreement
- Send Agreement
- Send Reminder
- Update Agreement

Certain actions will not be allowed. For example, you cannot cancel an agreement that is already signed. You cannot send an agreement that is already sent. If you try to take these actions, you will see an error appear on the agreement record page.



Custom Settings and Customizations for Salesforce (Key Feature)

Settings allow you to change the behavior of eSign services for Salesforce and customize it to fit to your business needs.

Adobe Document Cloud eSign services for Salesforce supports various custom settings:

- Document Cloud Settings control which features are exposed to your eSign services users and also sets the application's behavior. This is the main set of core settings for the application.
- Document Cloud Environment Settings control the default URLs and environment settings.
- Document Cloud Toolbar Settings control the buttons that appear in the eSign services Toolbar.
- Document Cloud Merge Mapping Settings control how attachments are handled whenever there is a merge mapping used.
- Document Cloud Push Mapping Settings control how recipient records are created or updated when agreements created outside of Salesforce are pushed into Salesforce.
- Document Cloud Chatter Settings control which agreement events will result in Chatter posts and where the Chatter posts will appear. These settings only appear if you have the eSign services for Chatter app installed on your org.
- Document Cloud Lead Conversion Settings control the disposition of the agreements that are associated with a lead when it is converted to an account, contact, or opportunity.

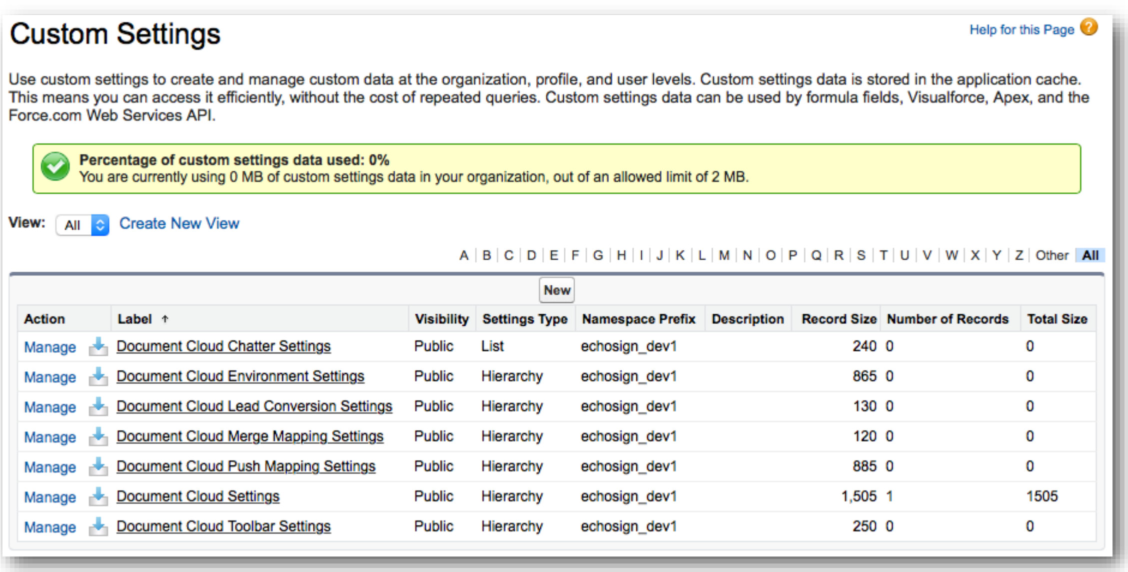
Settings can be set for the entire Salesforce organization or for specific users and profiles.

Default Organization Level Settings

These settings affect all users and profiles in the organization, unless their settings override the default organization level settings (see below)

1. Click **Setup** then navigate to **Build | Develop | Custom Settings.**

   The Custom Settings page displays.

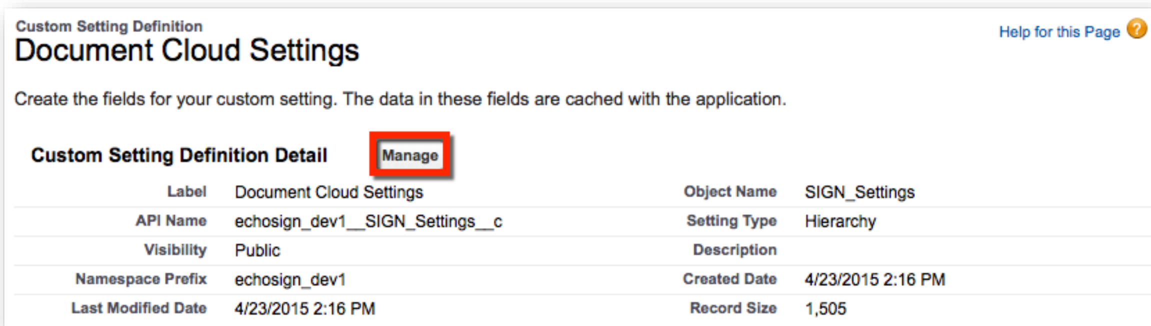


Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Document Cloud Chatter Settings	Public	List	echosign_dev1		240	0	0
Manage	Document Cloud Environment Settings	Public	Hierarchy	echosign_dev1		865	0	0
Manage	Document Cloud Lead Conversion Settings	Public	Hierarchy	echosign_dev1		130	0	0
Manage	Document Cloud Merge Mapping Settings	Public	Hierarchy	echosign_dev1		120	0	0
Manage	Document Cloud Push Mapping Settings	Public	Hierarchy	echosign_dev1		885	0	0
Manage	Document Cloud Settings	Public	Hierarchy	echosign_dev1		1,505	1	1505
Manage	Document Cloud Toolbar Settings	Public	Hierarchy	echosign_dev1		250	0	0

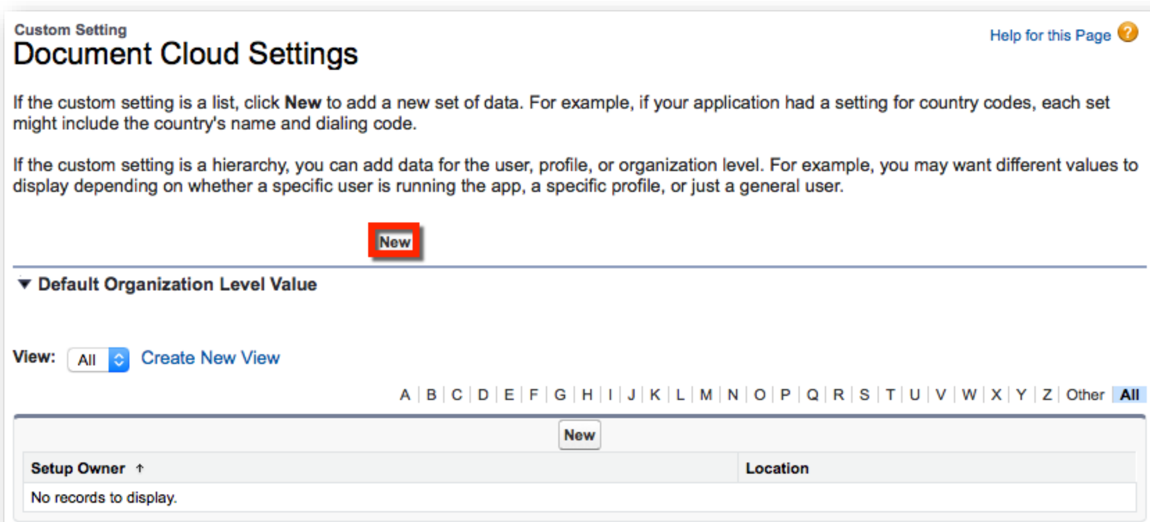
2. Click on one of the links as appropriate:
   - Document Cloud Chatter Settings
   - Document Cloud Environment Settings
   - Document Cloud Lead Conversion Settings
   - Document Cloud Merge Mapping Settings
   - Document Cloud Push Mapping Settings
   - Document Cloud Settings
   - Document Cloud Toolbar

   (The examples below show *Document Cloud Settings*.)

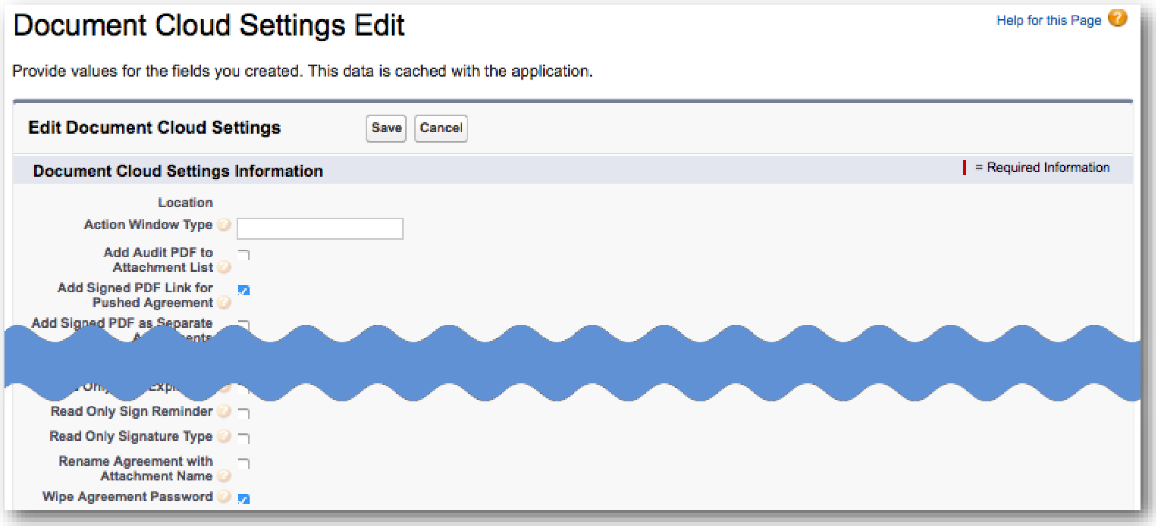
3. Click the **Manage** button.



4. Click the **New** button (above the 'Default Organization Level Value' label) to create default custom settings for all users.



5. Update the appropriate settings.



6. Click the **Save** button.

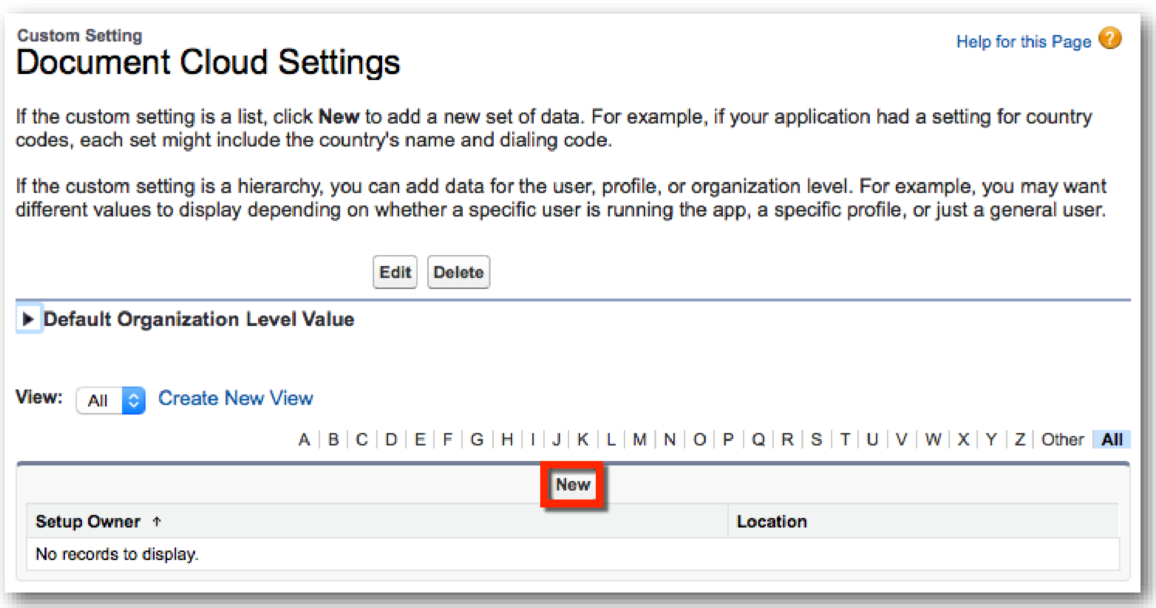
See [Available Document Cloud Settings]() for more information.

Settings for Specific Users and Profiles

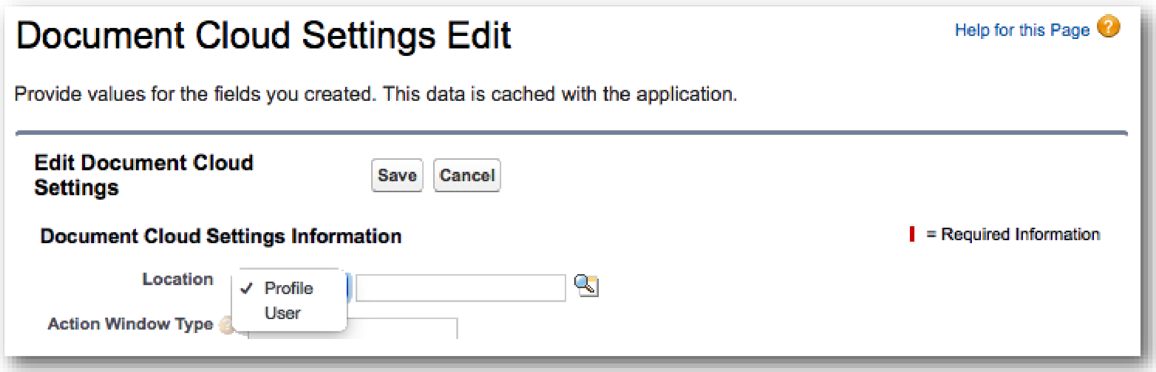
Follow steps 1-4 above.

1. Click the **New** button (above the 'Setup Owner' table) to create custom settings for specific Users or Profiles that override the Default Organization Level (if defined).

   Note: You can use the Show/Hide toggle (▼) to collapse the Default Organization Level Value section.



2. From the Location drop-down, select User or Profile then use the search icon ( ) to search for the profile you'd like to change these settings for and set values for the appropriate settings.



3. Click the **Save** button.

See Available Document Cloud Settings for more information.

Available Document Cloud Settings

Document Cloud Settings

Each of the settings has a question mark icon that you can click on to see the description of the setting.

- **Action Window Type**—Determine how eSign services windows open in users' browsers. Enter 'Window' to open in new windows, enter 'Frame' to open as a layer on top of the Agreement page, or leave the field empty for the default behavior, which is to auto-detect based on the user's browser capabilities.
- **Add Audit PDF to Attachment List**—Enable this setting to attach the PDF of the audit trail to the Agreement record after the agreement is signed.
- **Add Signed PDF as Separate Attachments**—Enable this setting to attach the PDF of the signed agreements as separate attachments when there are multiple documents sent in a single transaction. To stop receiving the signed agreement as a merged PDF, please contact Adobe Support for assistance.
- **Add Signed PDF for Pushed Agreements**—The setting applies to agreements sent from outside of Salesforce and pushed into Salesforce. Enable this setting to attach the signed PDF to the Agreement record.
- **Add Signed PDF Link for Pushed Agreements**—This setting applies only for pushed agreements sent outside of Salesforce. Enable this setting to add a link for signed PDF to the Agreement record.
- **Add Supporting Files to Attachment List**—Enable this setting to attach the PDFs of the supporting documents to the Agreement record after the agreement is signed. Through the supporting document fields in the agreement, the signers upload and attach the supporting documents to the agreement transaction.
- **Allow Sending on Behalf of Others**—Enable this setting to allow sending agreements on behalf of others.
- **Auto-Sync Group Mappings**—Enable this setting to automatically move the correct eSign services groups when their Salesforce user profiles are updated.
- **Callback URL DC to Salesforce Site**—Entering the Callback URL into this box is required when sending large document transactions (greater than 4.0 MB from the send agreement page and 9.0 MB when sending in batch). This setting is the Secure Web Address that is copied from the EchoSign Callback Site, which is set up to send large files. See Configure Salesforce to Send Large Documents for Signature for more instructions.

- **Create Sign Deadline Reminder Event**—Enable this setting to display Salesforce alerts reminding users when sent agreements are about to expire. Specify the number of days before agreement expiration that the alert is shown using the Days Sign Deadline Reminder Event setting.
- **Days Sign Deadline Reminder Event**—Enter a number of days and enable the Create Sign Deadline Reminder Event setting. This allows 'agreement about-to-expire alerts' to be shown to your users in Salesforce. Alerts are shown the specified number of days before agreement expiration.
- **Disable Agreement Chatter Feed**—Enable this setting to turn off the Chatter feed on the Agreement object.
- **Disable Contact Recipient Type**—Enable this setting to hide the option to select a Contact as a recipient on the send agreement page.
- **Disable Email Recipient Type**—Enable this setting to hide the option to type an Email address as a recipient on the send agreement page.
- **Disable Knowledge Based Authentication**—Enable this setting to hide the Knowledge Based Authentication (KBA) identity verification option for agreements. This is a signer identity verification method that requires signers to provide and verify personal information to sign the document. Usage of this feature is limited and may incur added costs. Also, make sure your account send settings on echosign.adobe.com have KBA enabled so you can use it in Salesforce.
- **Disable Lead Recipient Type**—Enable this setting to hide the option to select a Lead as a recipient on the send agreement page.
- **Disable Social Identity Verification**—Enable this setting to hide the social identity verification option for agreements. Web identity verification requires signers to verify their identity by signing into one of the following sites: Facebook, Google, LinkedIn, Twitter, Yahoo!, or Microsoft Live. Also, make sure your account send settings on echosign.adobe.com have web identity enabled so you can use it in Salesforce.
- **Disable User Recipient Type**—Enable this setting to hide the option to select a User as a recipient on the send agreement page.
- **Disable User Provisioning—**Enable this setting to prevent users from being auto-provisioned with an Adobe user account when they send or manage agreements. This setting does not prevent the auto-provisioning of users that occurs when Update Agreement is clicked from the Agreement list.
- **Enable Mapping Error Notification**—Enable this setting to send email notifications to the data mapping or merge mapping owner any time there are errors when the mappings are executed.
- **Enable Per Signer Identity Verification**—Enable this setting to allow each signer to have a different identity verification method. (e.g., password, phone, social identity, KBA)
- **Enable Post Sign Options**—Enable this option to take your singers to a landing page of your choice. This makes the 'Post Sign Redirect URL' and 'Post Sign Redirect Delay' options available on the send agreement page. Signers of an agreement are redirected to the specified URL after they sign. For example, you could redirect them to your company web site or a survey page. This option can be made read only for senders using the Read Only Post Sign Options setting.
- **Enable Phone Authentication**—Enable this setting to show the phone authentication option for verifying recipient identity. Usage of this feature is limited and may incur added costs.
- **Enable Recipient Approver Role**—Enable this setting to enable the option to mark any recipient as an Approver. Approvers review and approve the document but they are not required to sign it.
- **Enable Send Written Signature To Fax**—Enable this setting and eSign services will attempt to use the recipient's fax number instead of the email address when sending an agreement for fax signature.
- **Enable Sender Signs Only**—Enable this setting to display and enable the 'Sender Signs Only' option in the Recipients section of the send agreement page. When the 'Sender Signs Only' option is used, the agreement or document is presented to the sender to sign. This functionality is similar to the 'Only I Sign' functionality in Adobe services. This option can be set to read only using the Read Only Sender Signs Only setting.

- **Enable Separate Signer Identity Methods**—Enable this setting to be able to select different identity verification methods for recipients in your eSign services account and those outside of your eSign services account. This applies to knowledge based authentication (KBA), social identity verification, and password to sign. For example, you can require that a customer be verified with Knowledge Based Identity before signing the document but require that your sales manager instead provide a password to sign the document. If you don't check this box, then all signers or approvers will verify using the same method, as selected by the sender.
- **Hide Ability to Add Field Templates**—Enable this setting to hide the link, which allows senders to "Add Form Field Template" on draft documents.
- **Hide Account Lookup**—Enable this setting to hide the Account lookup option on the send agreement page.
- **Hide Add Recipient**—Enable this setting to hide the option to add recipients on the send agreement page.
- **Hide Delete Agreement Attachments**—Enable this setting to hide the option to delete agreement attachments on the send agreement page.
- **Hide Delete Recipient**—Enable this setting to hide the option to delete recipients on the send agreement page.
- **Hide Edit Agreement Attachments**—Enable this setting to hide the edit option for attachments associated with draft agreements.
- **Hide Opportunity Lookup**— Enable this setting to hide the Opportunity lookup option on the send agreement page.
- **Hide Password for Signed PDF**— Enable this setting to hide the option to set a password to open the PDF for the signed agreement.
- **Hide Preview or Position**— Enable this setting to hide the option to preview the document or position fields on the send agreement page.
- **Hide Reorder Attachments**—Enable this setting to hide the sort attachments option for draft agreements.
- **Hide Reorder Recipients**—Enable this setting to hide the sort recipients option for draft agreements.
- **Hide Replace Signer**—Enable this setting to hide the ability to replace the current signer or approver after the agreement has been sent.
- **Hide Salesforce Content/Files Att.**—Enable this setting to hide the option to add Salesforce Content of Files to draft agreements.
- **Hide Salesforce Documents Attachments**—Enable this setting to hide the option to add Salesforce Documents to draft agreements.
- **Hide Send Email Copies**—Enable this setting to hide the 'Send email copies to:' field on the send agreement page.
- **Hide Sender Signs**—Enable this setting to hide the option for the sender to also sign the agreement.
- **Hide Sidebar for Agreement Editor Page**—Enable this setting to hide the sidebar in the Agreement Editor page. The Agreement Editor page can be accessed by clicking an the name of an agreement displayed in the sidebar, in the Agreements Home page, or in the list of agreements for a related object.
- **Hide Signature Type**—Enable this setting to hide the option select a signature type (e-Signature or Fax Signature) on the send agreement page.
- **Hide Sign Expiration**—Enable this setting to hide the option to set the number of days before the agreement will expire on the send agreement page.
- **Hide Signing Password**—Enable this setting to hide the option to set a password to be required to sign an agreement.
- **Hide Sign Reminder**—Enable this setting to hide the option to set a reminder for signers on the send agreement page.

- **Hide Upload Agreement Attachments**—Enable this setting to hide the option to upload local files for draft agreements.
- **Hide View Agreement Attachments**—Enable this setting to hide the option to disable viewing of attachments on the send agreement page.
- **Override Recipient Field List**—This field allows you to change the default set of agreement fields that determine which Agreement fields are used when selecting the recipient for an agreement when sending for signature. When used, this setting should contain a list of comma-separated API field names from the agreement record. The field names should be in order and represent the fields the recipients should be read from. (e.g., SignerA_Email__c,SignerB_Email__c)
- **Read Only Account**—Enable this setting to make the Account field a read-only agreement field. This is useful if you want to pre-populate the field but not allow sender to edit it.
- **Read Only Agreement Name**—Enable this setting to make the Agreement Name field a read-only agreement field.
- **Read Only Email Copies**—Enable this setting to make the "Send email copies to" field a read-only agreement field.
- **Read Only Field Set**—Enable this setting to make the Additional Fields section read-only on an agreement.
- **Read Only Hosted Signing**—Enable this setting to make the Hosted Signing checkbox a read-only agreement field.
- **Read Only Language**—Enable this setting to make the Language field a read-only agreement field.
- **Read Only Message**—Enable this setting to make the Message field a read-only agreement field.
- **Read Only Opportunity**—Enable this setting to make the Opportunity lookup field a read-only agreement field.
- **Read Only Post Sign Options**—Enable this setting to display the 'Post Sign Redirect URL' and 'Post Sign Redirect Delay' options as read-only in the Recipients section of the send agreement page. This setting works in conjunction with the Enable Post Sign Options setting.
- **Read Only Preview or Position**—Enable this setting to make the "Preview document or position signature fields" checkbox a read-only agreement field.
- **Read Only Recipient**—Enable this setting to make the Recipients section read-only on an agreement.
- **Read Only Recipient Signing Order**—Enable this setting to make the options for recipient signing order read-only on an agreement
- **Read Only Security Options**—Enable this setting to make the Security Options section read-only on an agreement.
- **Read Only Sender Signs**—Enable this setting to make the "I also need to sign this document" checkbox a read-only agreement field.
- **Read Only Sender Signs Only—**Enable this setting to display the 'Sender Signs Only' option as read-only in the Recipients section of the send agreements page. This setting works in conjunction with the Enable Sender Signs Only setting.
- **Read Only Signature Type**—Enable this setting to make the Signature Type field a read-only agreement field.
- **Read Only Sign Expiration**—Enable this setting to make the "Allow signers X days to sign this document." a read-only agreement field.
- **Read Only Sign Reminder**—Enable this setting to make the "Remind recipient to sign" checkbox a read-only agreement field.
- **Rename Agreement with Attachment Name**—Enable this setting to rename the agreement using the name of the attached document.
- **Show Document Cloud Field Templates**—Enable this setting to show the option to select and apply eSign services form field layer templates on documents.

- **Show Document Cloud Library Attachments**—Enable this setting to show the option to add eSign services document templates.
- **Show Hosted Signing Option**—Enable this setting to show the 'Host signing for the first signer' field on the agreement page to get in-person signatures.
- **Show Recipient Signing Order Options**—Enable this setting to show 2 options for recipient signing: serial (ordered entered) or parallel (in any order)
- **Wipe Agreement Password**—Enable this setting to not store in Salesforce the encrypted password field on the agreement after it is sent. This applies to the password that is set to sign or view the agreement.

Document Cloud Environment Settings

Environment settings allow you to control your environment.

- **Config API URL**—Enter a URL to override the default Adobe eSign API URL for the specified environment.
- **Config URL**—Enter a URL to override the default Adobe eSign legacy integration URL for the specified environment.
- **Environment Name**—Specify an environment name (Prod, Stage, Preview, Demo) to point to one of those Adobe eSign environments.

Document Cloud Toolbar Settings

Toolbar settings allow you to control which Document Cloud toolbar actions will be available in your account. You may create different toolbar settings for different profiles or users.

- **Cancel (Draft)**—Available only when an agreement was not yet sent. Clicking this button would delete the agreement in Salesforce. This button is hidden by default.
- **Cancel Agreement**—Cancels an agreement after it was sent for signature, but keeps the record in Salesforce.
- **Delete Agreement**—Cancels an agreement after it was sent for signature and deletes the record from Salesforce.
- **Disable Agreement Review Logo**—Hides the logo and text on the Agreement page that asks users to review the eSign services for Salesforce app on the AppExchange.
- **Disable Bulk (Batch) Cancel Agreement**—Disables the ability to cancel documents in batch. See Send and Manage Agreements in Batch for more information.
- **Disable Bulk (Batch) Delete Agreement**—Disables the ability to delete documents in batch.
- **Disable Bulk (Batch) Send Agreement**—Disables the ability to send documents in batch.
- **Disable Bulk (Batch) Send Reminder**—Disables the ability to send reminders in batch.
- **Disable Bulk (Batch) Update Agreement**—Disables the ability to update documents in batch.
- **Enable On Load Action**—Allows users to pass in an action to the Agreement page as an HTTP parameter, the page then executes that action right away.
- **Save Agreement**—Saves the agreement.
- **Send Agreement**—Sends an agreement for signature.
- **Send Reminder**—Send a reminder to the current signer.
- **Update Status**—Queries eSign services to update the status of the agreement in Salesforce.
- **View Agreement**—Opens the eSign services 'View Agreement' page allowing the user to view it and perform additional tasks.

Document Cloud Merge Mapping Settings

Merge mapping settings allow you to control which how the attachments will be managed when merge mappings are used for sending agreements. Reference merge mappings documentation for more information.

- **Attach Merged Document**—When a merge mapping is used for an agreement, selecting this option will attach the document with the merged data into the agreement record after the agreement is sent.
- **Remove Original document**—When a merge mapping is used for an agreement, selecting this option will remove the original template document from the agreement record after the agreement is sent.

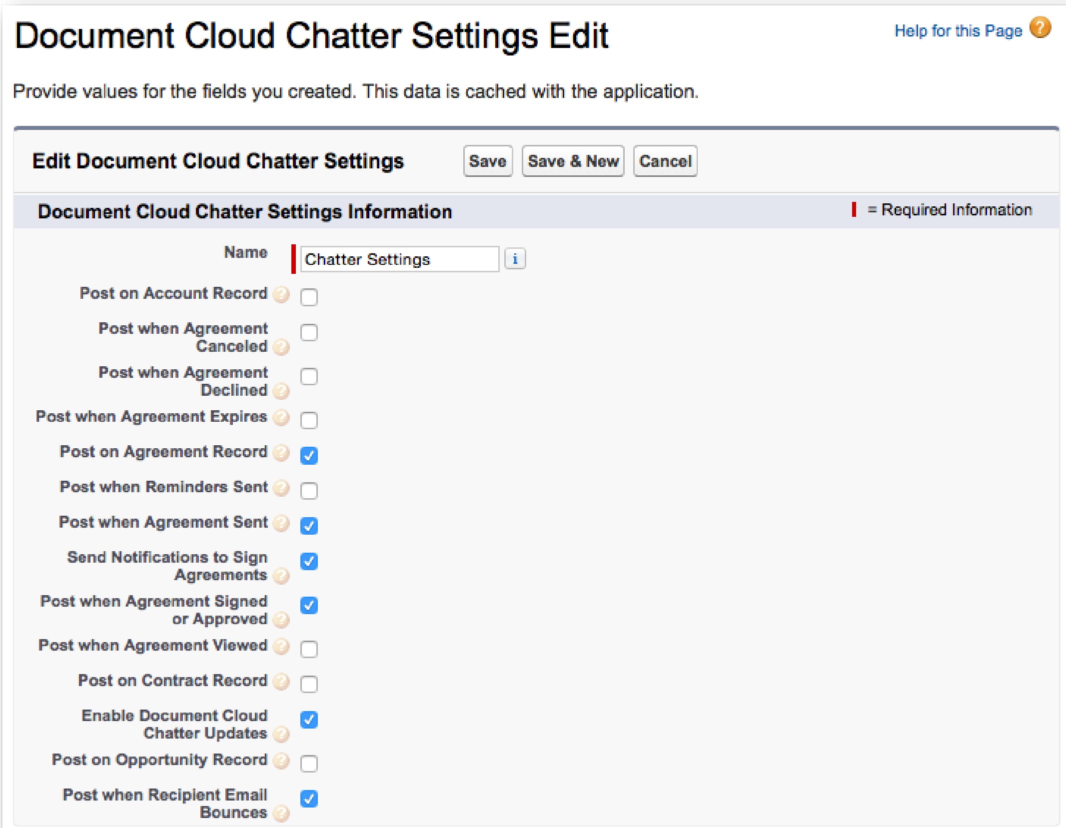
Document Cloud Push Mapping Settings

Push mapping settings allow you to control how recipient records are created or updated when agreements created outside of Salesforce are pushed into Salesforce. Reference the agreement push mapping documentation for more information about how to set up Salesforce so that documents created elsewhere can also be created in Salesforce automatically.

- **Auto Create Recipient Object**—This field is used to specify which recipient type to create (Contact or Lead) when there is no existing contacts in Salesforce that match the original agreement's recipient. Type in 'Contact' or 'Lead' into this field based on the preference. The recipient lookup is also based on the entry in the 'Recipient Lookup Order' field.
- **Copy Contact Account**—Selecting this option will copy the first Contact recipient's Account lookup to the Agreement's Account lookup.
- **Copy Contact Opportunity**—Selecting this option will copy the first Contact recipient's Opportunity lookup to the Agreement's Opportunity lookup.
- **Recipient Lookup Domain Ignore List**—If a recipient's email belongs to one of the domains that is entered in this field, there will be no recipient matching performed and the recipient will be stored as an email address in Salesforce.
- **Recipient Lookup Order**—This field determines the order by which recipients from the agreement are searched for in Salesforce. For example, enter 'Contact, Lead, User' into this field if that is the order you want to find recipients.

Document Cloud Chatter Settings

Document Cloud Chatter Settings will appear if you have the eSign services for Chatter app installed on your org. These settings determine where to post Chatter updates and also which events will result in a Chatter post. You only should define one set of Chatter settings for your Org and you can provide a Name to the settings. You can learn more about eSign services for Chatter here with instructions for installation and setup.



- **Enable Document Cloud Chatter Updates**—Enable this setting to turn on Chatter updates for eSign services agreements.
- **Post on Account Record**—Post Chatter updates for eSign services agreements on the related Account record.
- **Post on Agreement Record**—Post Chatter updates for eSign services agreements on the Agreement record.
- **Post on Contract Record**—Post Chatter updates for eSign services agreements on the related Contract record.
- **Post on Opportunity Record**—Post Chatter updates for eSign services agreements on the related Opportunity record.
- **Post when Agreement Canceled**—Post Chatter update when agreement is canceled.
- **Post when Agreement Declined**—Post Chatter update when agreement is declined.
- **Post when Agreement Expires**—Post Chatter update when agreement expires.
- **Post when Agreement Sent**—Post Chatter update when agreement is sent.
- **Post when Agreement Signed or Approved**—Post Chatter update when agreement is signed and approved.

- **Post when Agreement Viewed**—Post Chatter update when agreement is viewed.
- **Post when Recipient Email Bounces**—Post Chatter update when recipient email bounces and is not delivered.
- **Post when Reminders Sent**—Post Chatter update when reminders are sent.
- **Send Notifications to Sign Agreements**—Post private Chatter message to signer when an agreement needs the signer's signature.

Note: There is another Chatter setting in the main Document Cloud Settings. By default, the Agreement record will be enabled for Chatter feeds but you can turn it off through the setting called 'Disable Agreement Chatter Feed'.

Document Cloud Lead Conversion Settings

Lead conversion settings allow you to retain agreements that have converted from Lead to Account, Contact, or Opportunity.

- **Account Retain Agreement**—Selecting this option will retain the Lead's agreements when it is converted to an Account.
- **Contact Retain Agreement**—Selecting this option will retain the Lead's agreements when it is converted to a Contact.
- **Opportunity Retain Agreement**—Selecting this option will retain the Lead's agreements when it is converted to an Opportunity.

Adding Custom Fields and Related Objects To the Agreement page

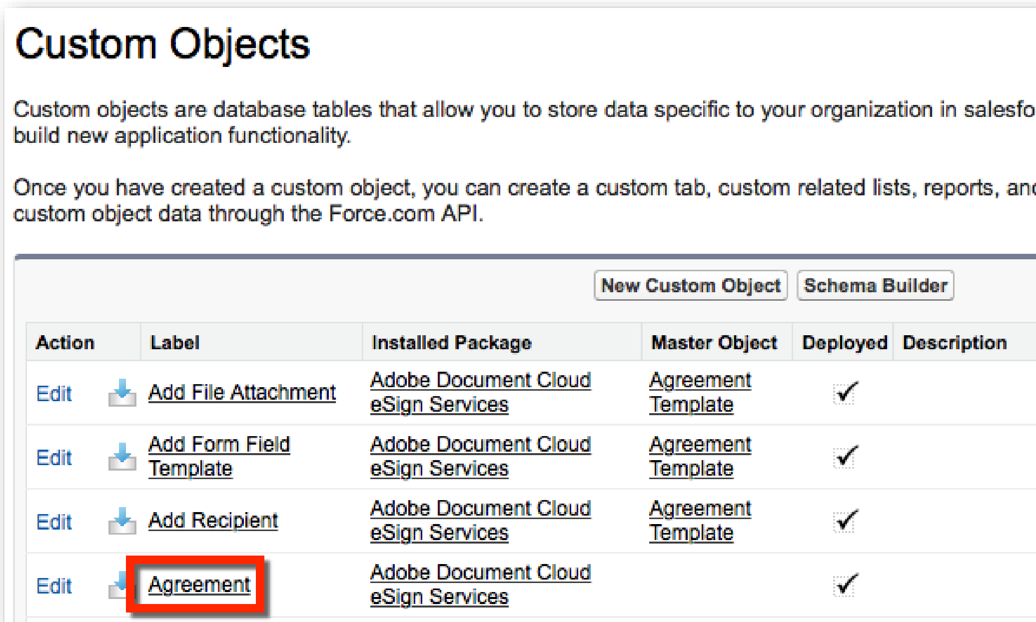
This section addresses customizing the default 'eSign services Agreement Advanced' page. These customizations are not available when using the 'eSign services Agreement Basic' page. See Select eSign services Agreements Page Style (Advanced or Basic) for more information.

Adding Custom Fields

Using Field Sets, you can add fields you would like to view and edit when viewing the agreement page. You may use the eSign services built-in field set and then add one or more fields from the Agreement Object that will be displayed on the agreement page.

eSign services already has a built-in field set you can use. Follow the steps below to customize it:

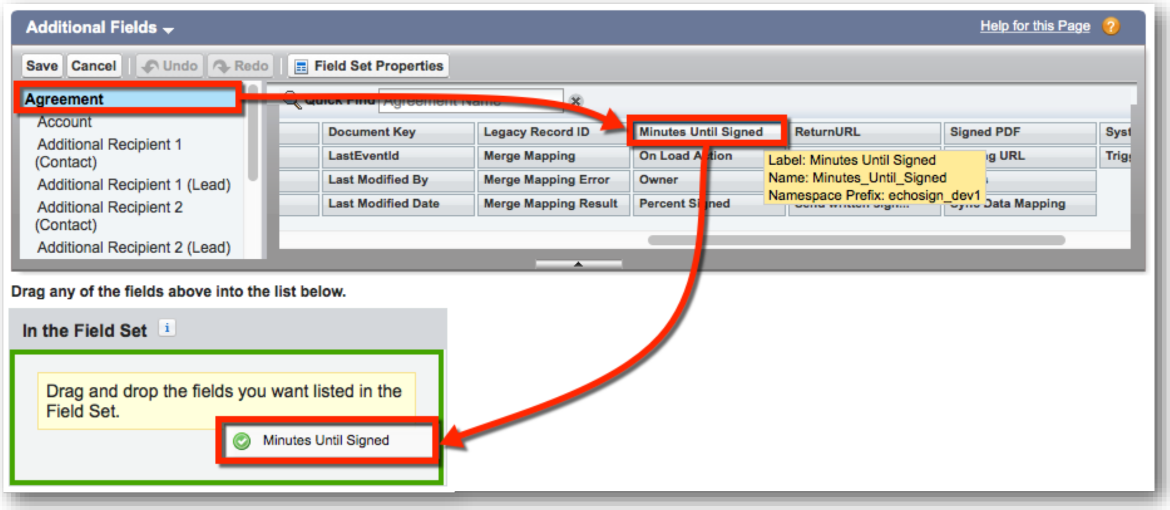
1. Click **Setup** then navigate to **Build | Create | Objects.**
2. Click the **Agreement** link.



3. Click the **Field Sets** link at the top of the page to navigate to that section.

4. Click the **Edit** Action.

5. Select the field you want to add and drag it into the ‘In the Field Set’ rectangle. Notice that eSign services only supports fields from the Agreement object and not from other objects.



6. Click the **Save** button.

When you look at the agreement, a new section will appear with the fields you have selected.

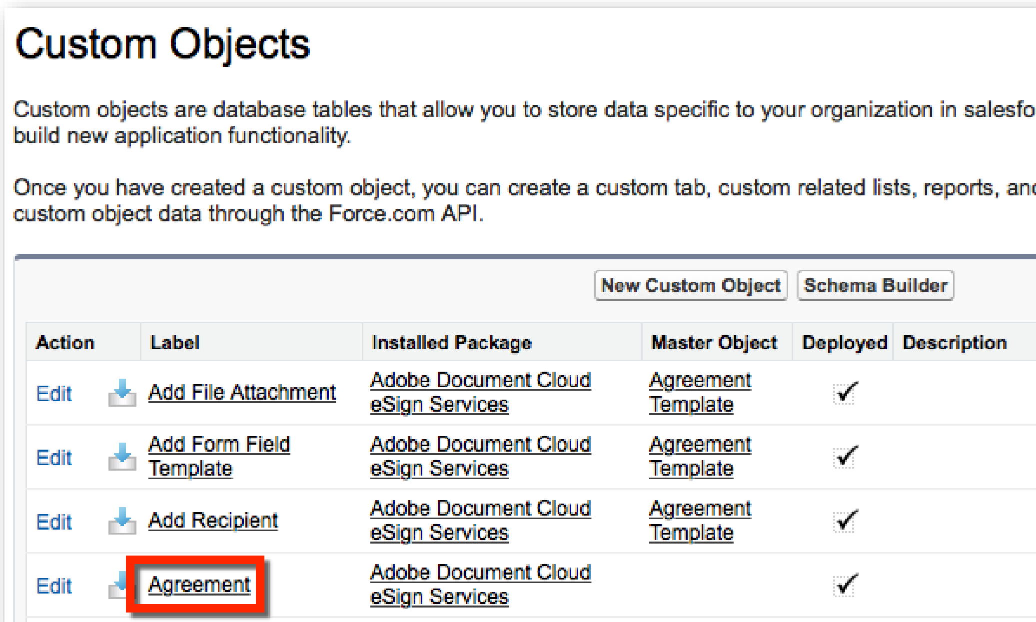
Adding Related Objects to the Agreement Page

You may associate eSign services Agreements with Salesforce objects of your choosing (standard or custom objects). This enables you to create Agreements that are linked to those objects and that show all the Agreements that relate to an object on that object's page. By default, it is related to Opportunity and Account.

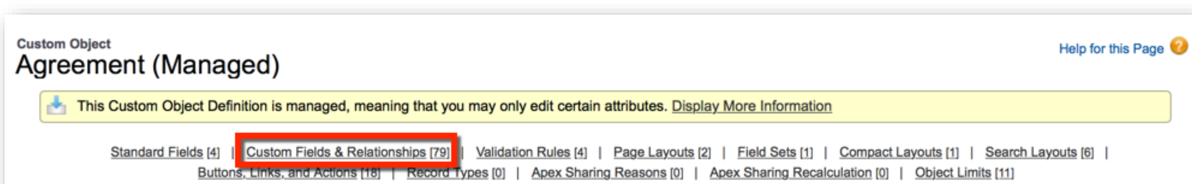
The instructions below describe how to associate Agreements with a Quote object, but they can be applied to any other object in your Salesforce Organization.

Note: Quotes must be enabled before you can add them to the Agreement page.

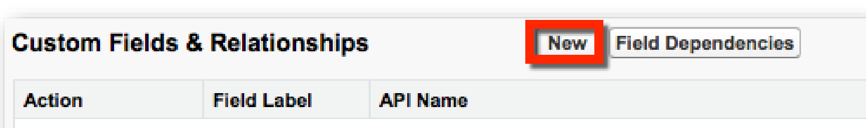
1. Click **Setup** then navigate to **Build | Create | Objects**.
2. Click the **Agreement** link.



3. Click the **Custom Fields & Relationships** link at the top of the page to navigate to that section.

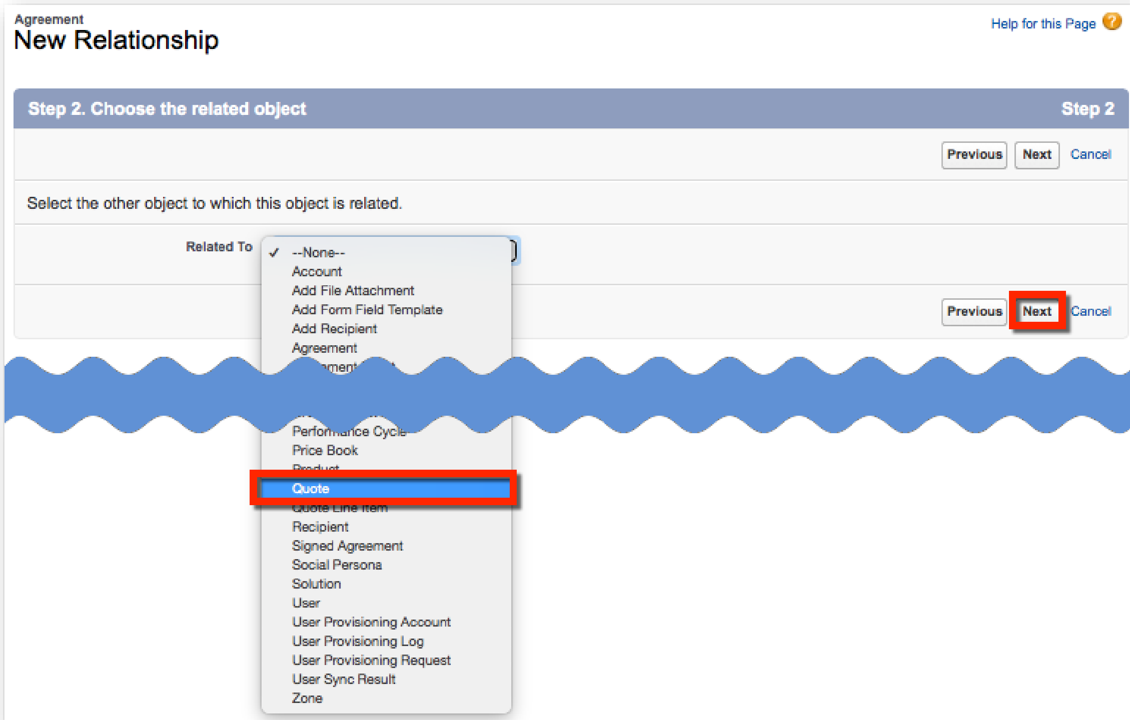


4. Click the **New button**.

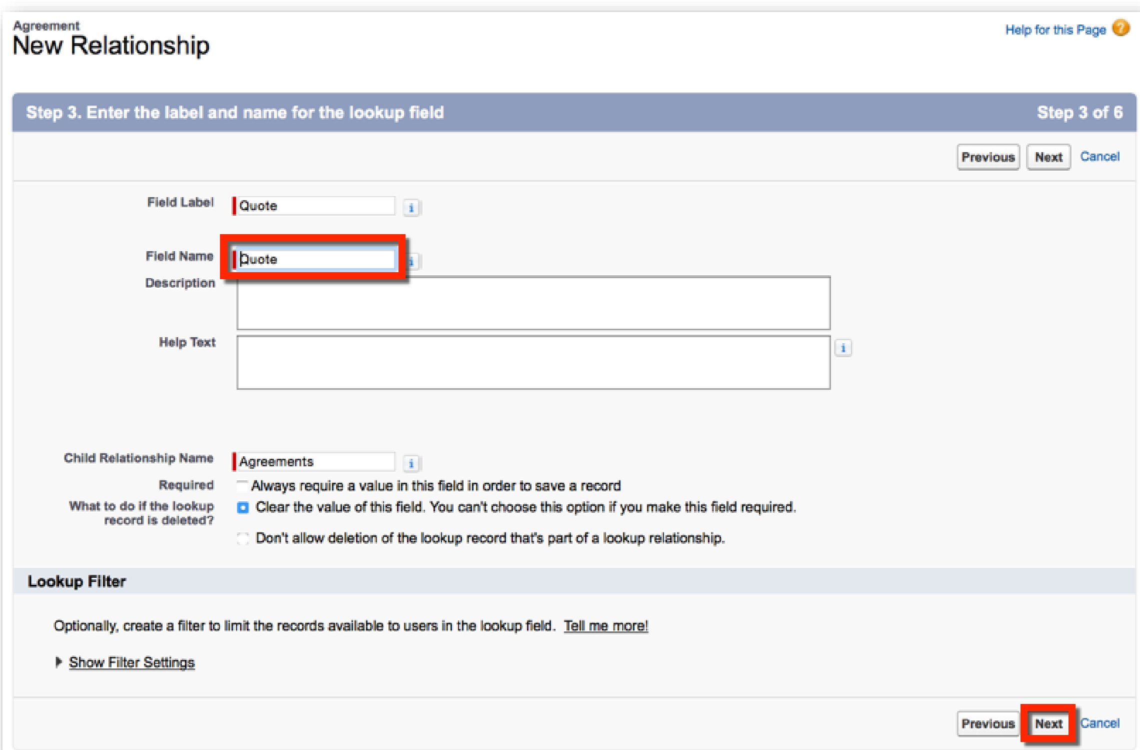


5. In “Step 1. Choose the field type”, select **Lookup Relationship** then click **Next** at the bottom right.

6. In "Step 2. Choose the related object", select **Quote** from the drop-down list then click **Next**.

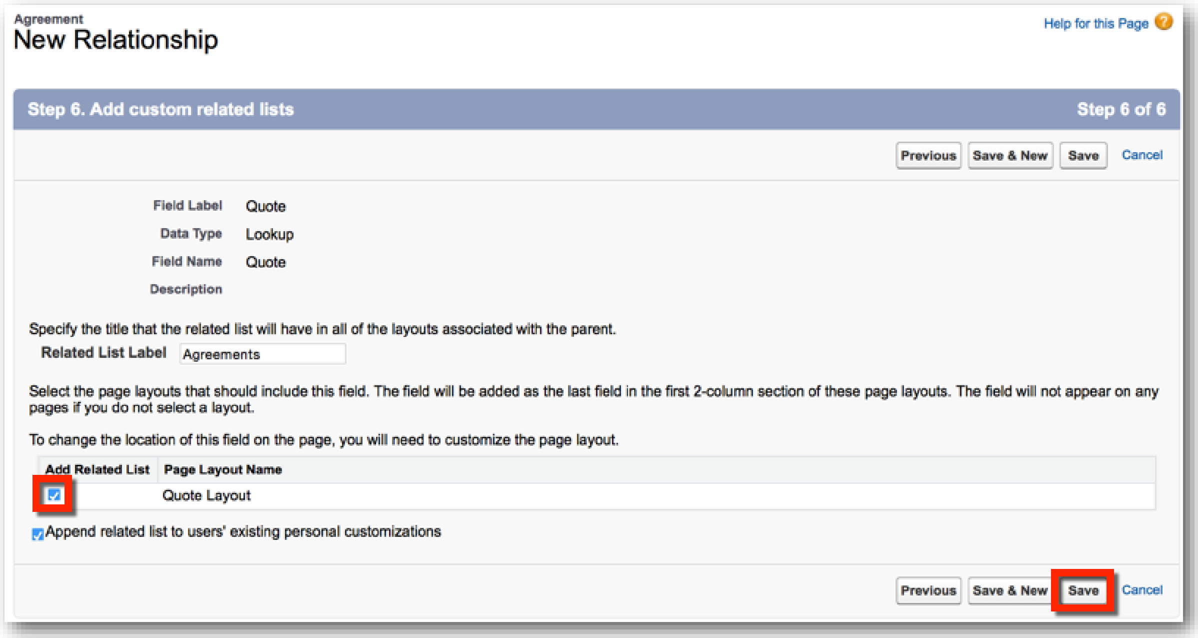


7. In "Step 3. Enter the label and name for the lookup field", enter a *Field Name* and click **Next**.



8. Click **Next** in *Steps 3, 4* and *5*.

9. In “Step 6. Add custom related lists”, ensure that the *Add Related List* option is enabled then click **Save**.



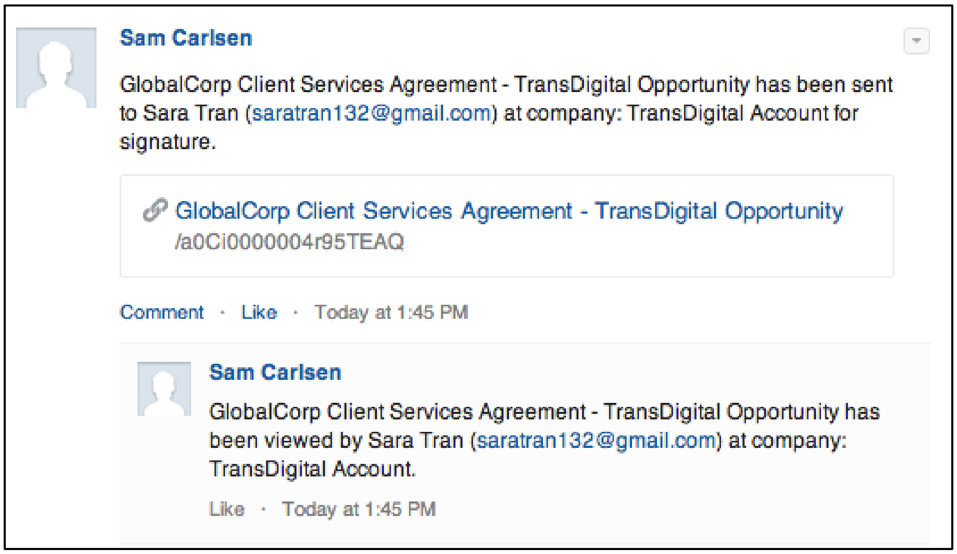
eSign Services for Chatter (Key Feature)

Adobe Document Cloud eSign services is Chatter enabled! Get real-time Chatter updates when:

- agreements are sent, viewed, signed, declined, cancelled, not delivered
- agreements expire or reminders sent
- you receive an agreement you need to sign

Follow Chatter updates on Agreement, Account, Contract, and Opportunity. Collaborate across your organization to close more deals.

You can also send agreements directly from Chatter Publisher Actions. Find out more.

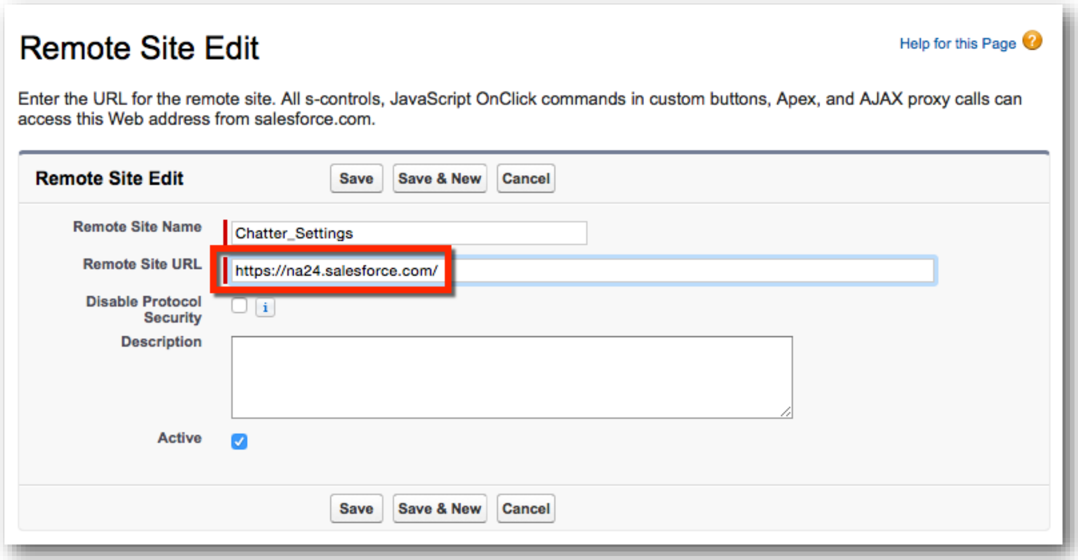


Setup Instructions for Chatter Status Updates

After installation the eSign services for Salesforce app, you can configure which Chatter updates you want your users to see.

1. Click **Setup** then navigate to **Build | Develop | Custom Settings** then select **Document Cloud Chatter Settings.** You only should define one set of Chatter settings for your Org and you can provide a Name to the settings. Click here to learn more about how to set up Chatter Settings.
2. Additionally, to enable Salesforce so that signers in your Org can get personal Chatter messages when they have a document to sign you must create a New Remote Site as follows:
   a) Click **Setup** then navigate to **Administer | Security Controls | Remote Site Settings.**
   b) Enter a unique alphanumeric *Remote Site Name.* It must begin with a letter, and contain underscores, but not end with an underscore. It cannot include two consecutive underscores. It cannot include spaces.

c) Enter a *Remote Site URL* by copying the first part of your web page URL (e.g., https://abchostname.salesforce.com) with the Salesforce Org domain. This URL may vary across different Orgs so make sure to enter the one specific to your Org.

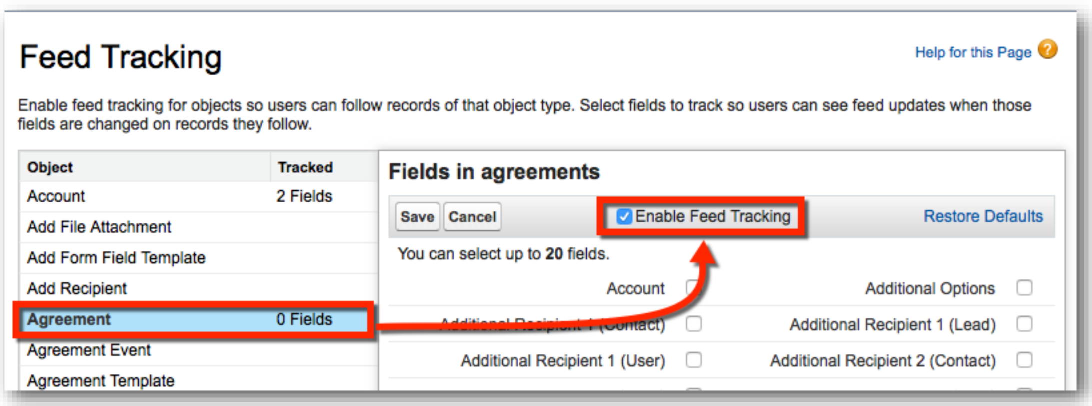


d) Click the **Save** button.

3. Make sure also that Chatter feeds are enabled for the Agreement record by doing the following:

a) Click **Setup** then navigate to **Build | Customize | Chatter | Feed Tracking**.

b) Click *Agreement*, then check the box *Enable Feed Tracking*.

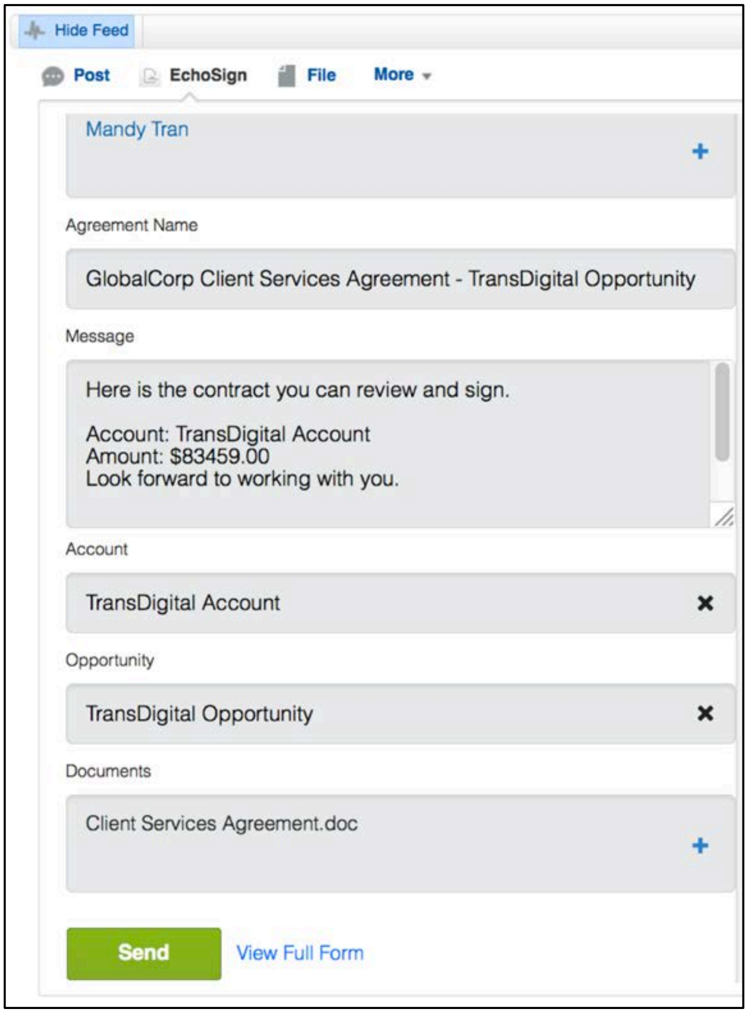


c) Click the **Save** button.

Chatter should now be enabled so that users will start receiving Chatter updates to track the status of their agreements.

Send from Chatter

From the Homepage, Opportunity, Account, or Contact feed, you can send agreements for signature through the eSign services Publisher action. The same eSign services action is used in the Salesforce1 mobile app or mobile browser experience. Since sending from Chatter uses the same eSign services action as Salesforce, you can reference the Salesforce1 setup instructions in the next section to set up the eSign services action in the Chatter feed as shown here.



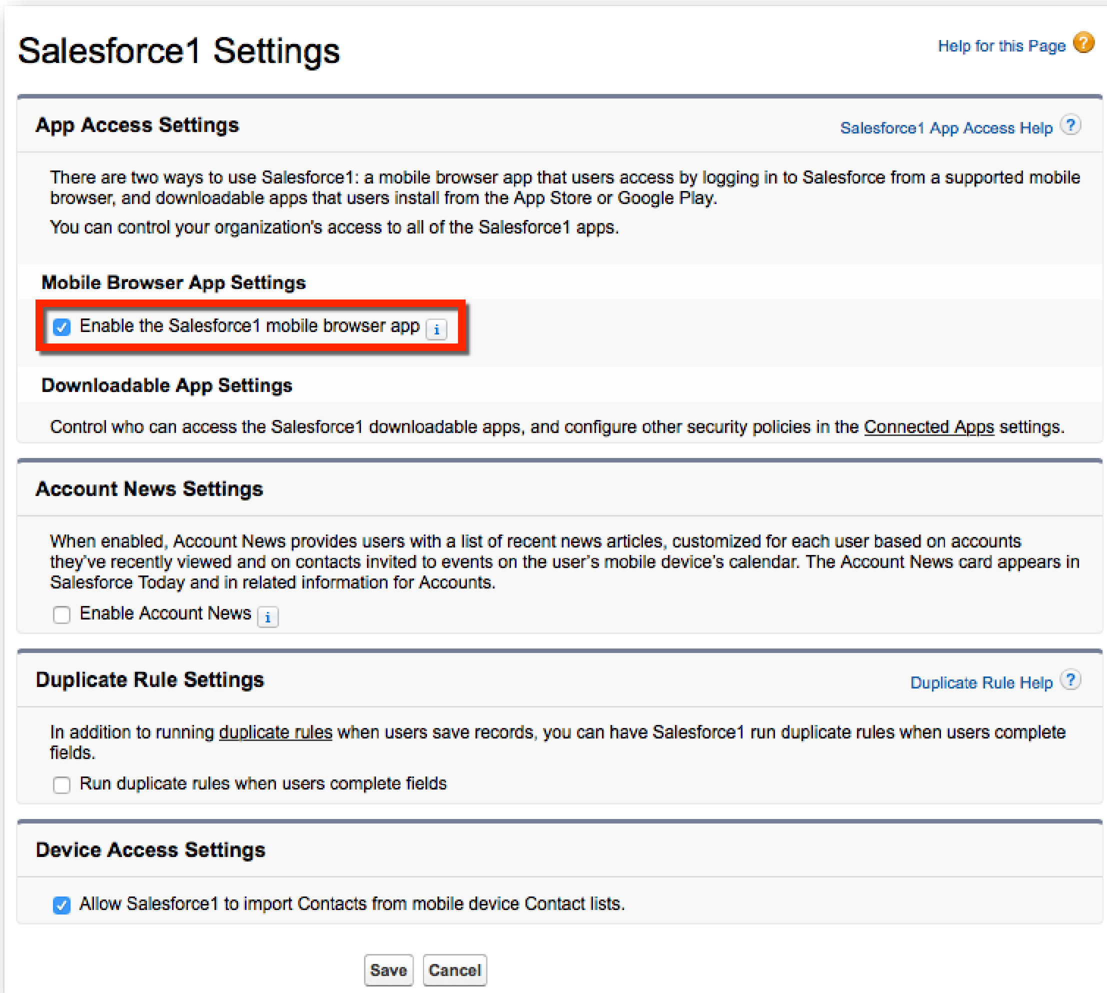
eSign Services for Salesforce1 Features (Key Feature)

eSign services is deeply integrated into the Salesforce1 platform. This enables the ability to send, manage, and get signatures from using the Salesforce1. There are two ways to use Salesforce1: a mobile browser app that users access by logging in to Salesforce from a supported mobile browser, and downloadable apps that users install from the App Store or Google Play.

Setting Up to Send Agreements from Salesforce1 Mobile

Before you can send agreements using Salesforce1, you must enable the option and add Adobe eSign Manager as a publisher action in the Global Publisher Layouts and the layout for the objects (e.g., Leads, Accounts, Contacts, Opportunities, Contracts).

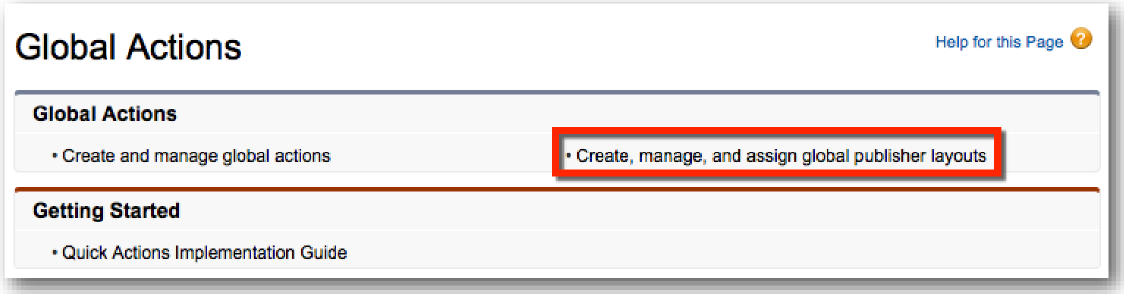
1. To enable Saleforce1, do the following:
   a) Click **Setup** then navigate to **Administer | Mobile Administration | Salesforce1 | Settings.**
   b) Click the **Enable Salesforce1 mobile browser app** option.



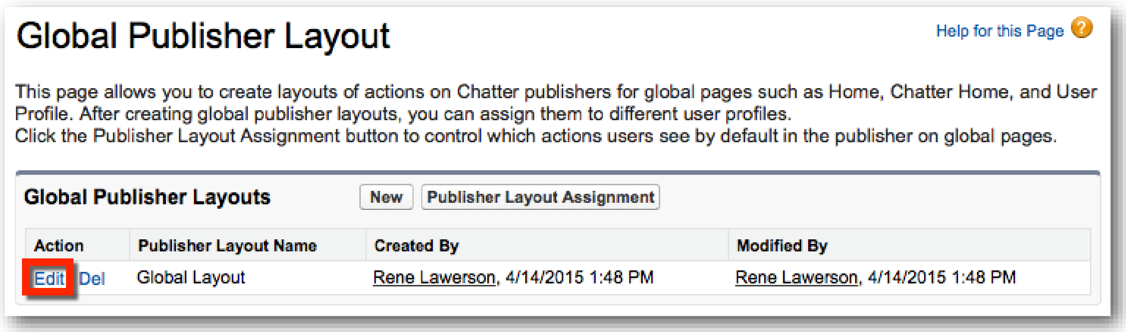
   c) Click the **Save** button.

2. To add the Adobe eSign Manager Publisher Action to the Homepage on Salesforce1 and Chatter feed, do the following:
   a) Click **Setup** then navigate to **Build | Create | Global Actions.**

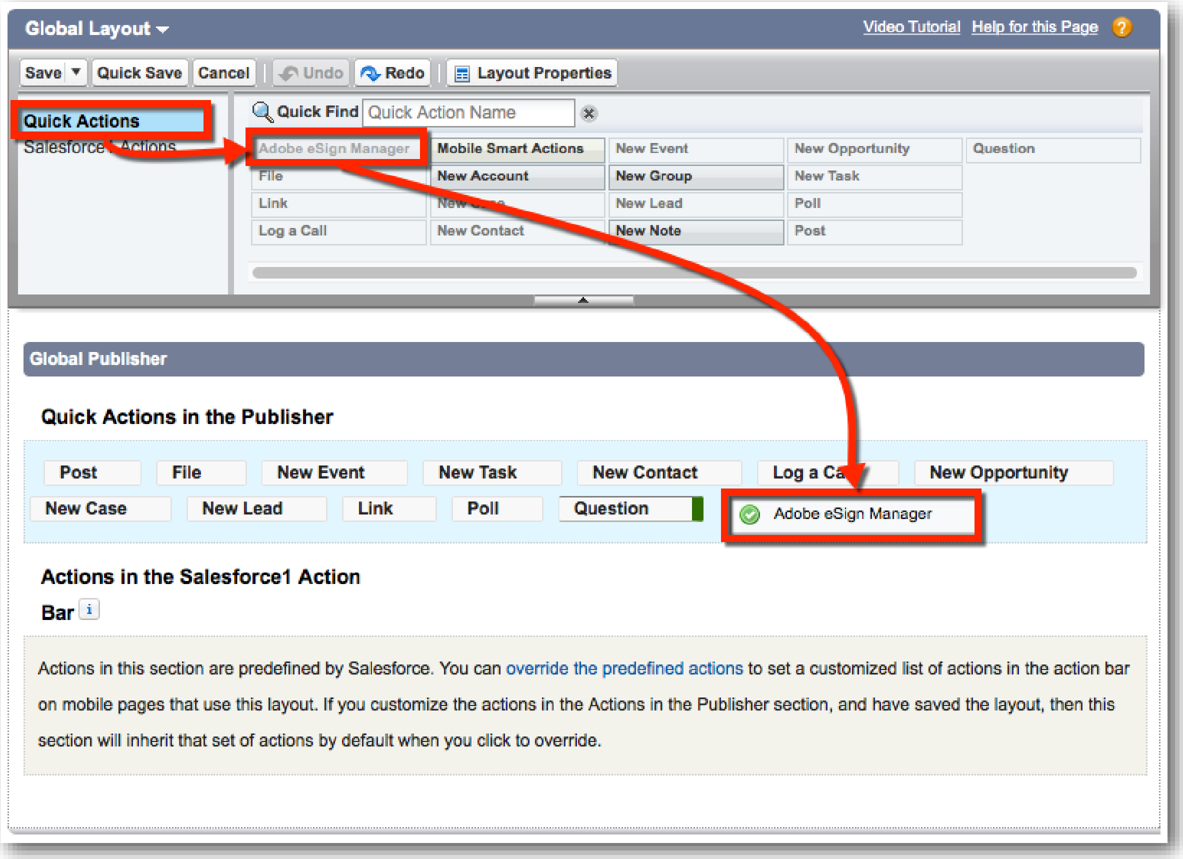
b) Click **Create, manage, and assign global publisher layouts**.



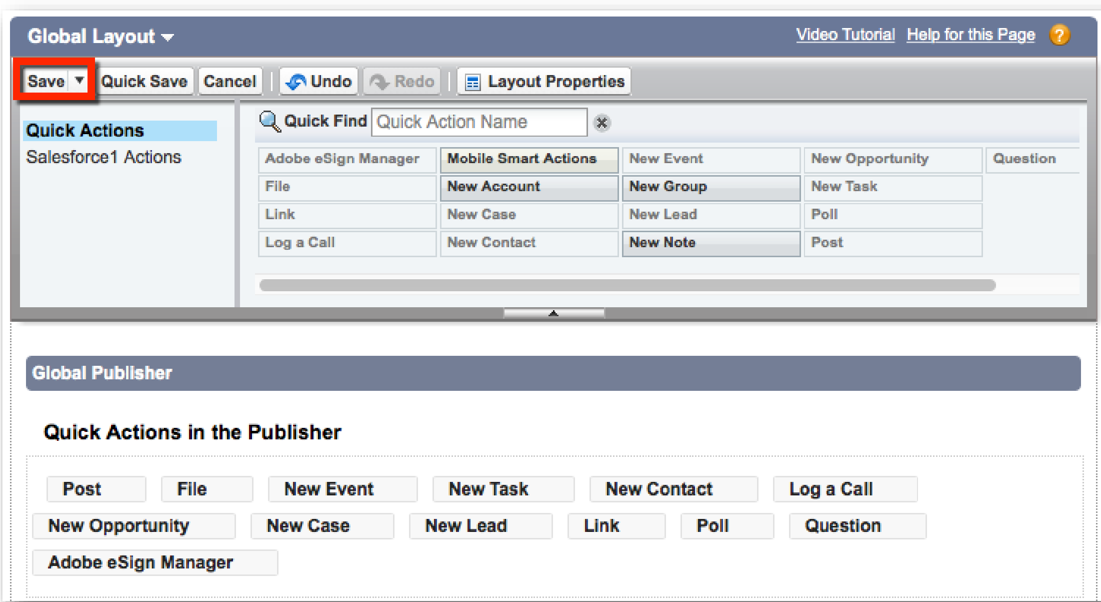
c) Click the **Edit** Action for Global Layout.



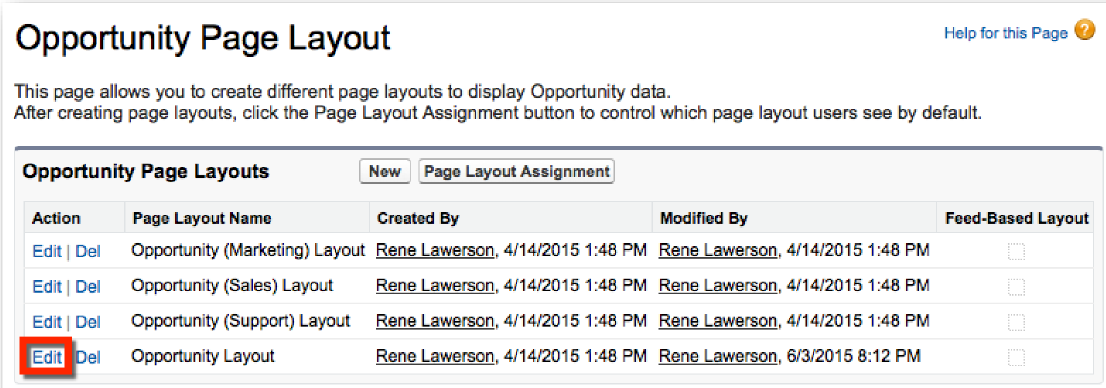
d) Drag the **Adobe eSign Manager** action to the *Quick Actions in the Publisher* section of the layout.



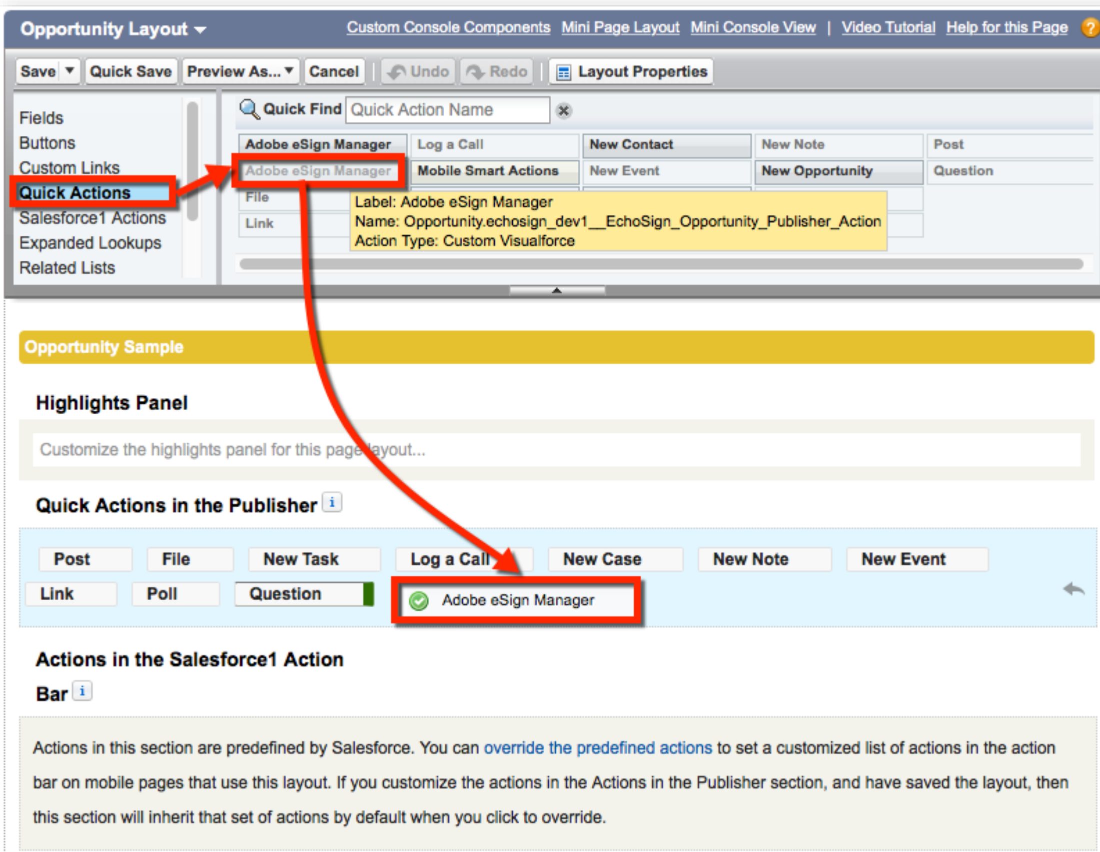
e) Click the **Save** button.



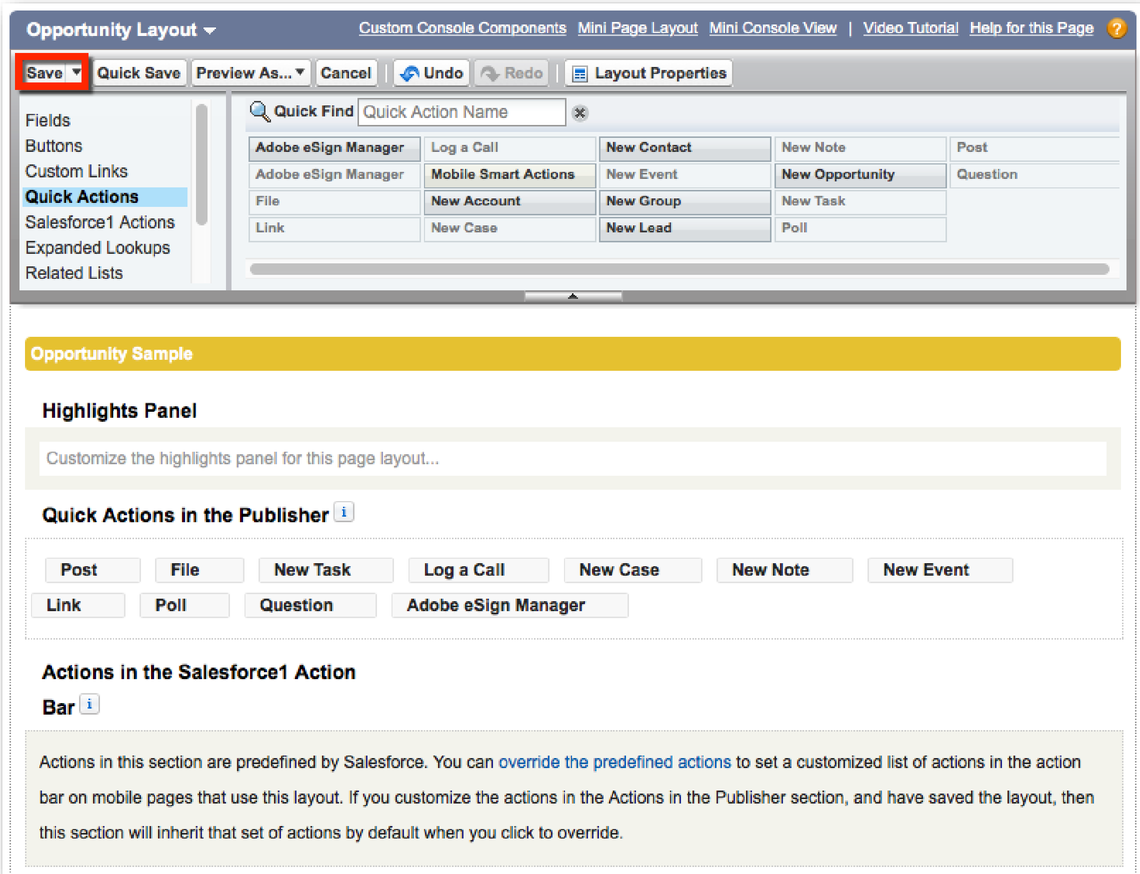
3. To add the Adobe eSign Manager Publisher action to the Opportunity, Account, or Contact objects, do the following:
   a) Click **Setup** then navigate to **Build | Customize | Accounts** or **Contacts** or **Opportunities | Page Layout**. (The examples below show the Opportunity Layout.)
   b) Click the **Edit** Action for Opportunity Layout.



   c) Drag the **Adobe eSign Manager** action to the *Quick Actions in the Publisher* section.



d) Click the **Save** button.

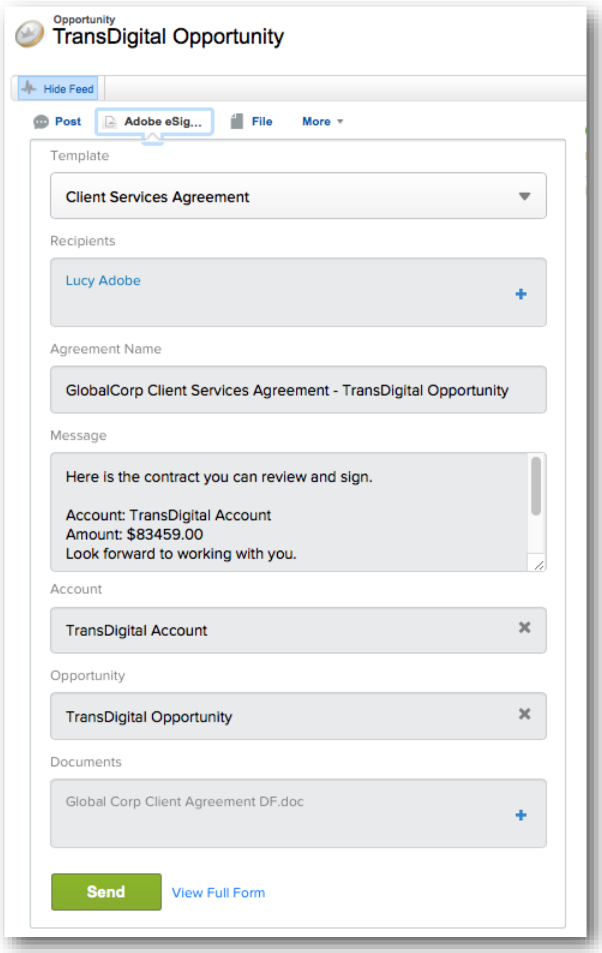


Using Agreement Templates with Publisher Send Action

You can use Agreement Templates with the Adobe eSign Manager Publisher Action, which enables powerful end-to-end workflows from the mobile Salesforce1 app and browser experience.

- In an agreement template, you can specify whether the agreement template should be available when sending from Chatter by enabling the 'Available for Publisher Actions' option.

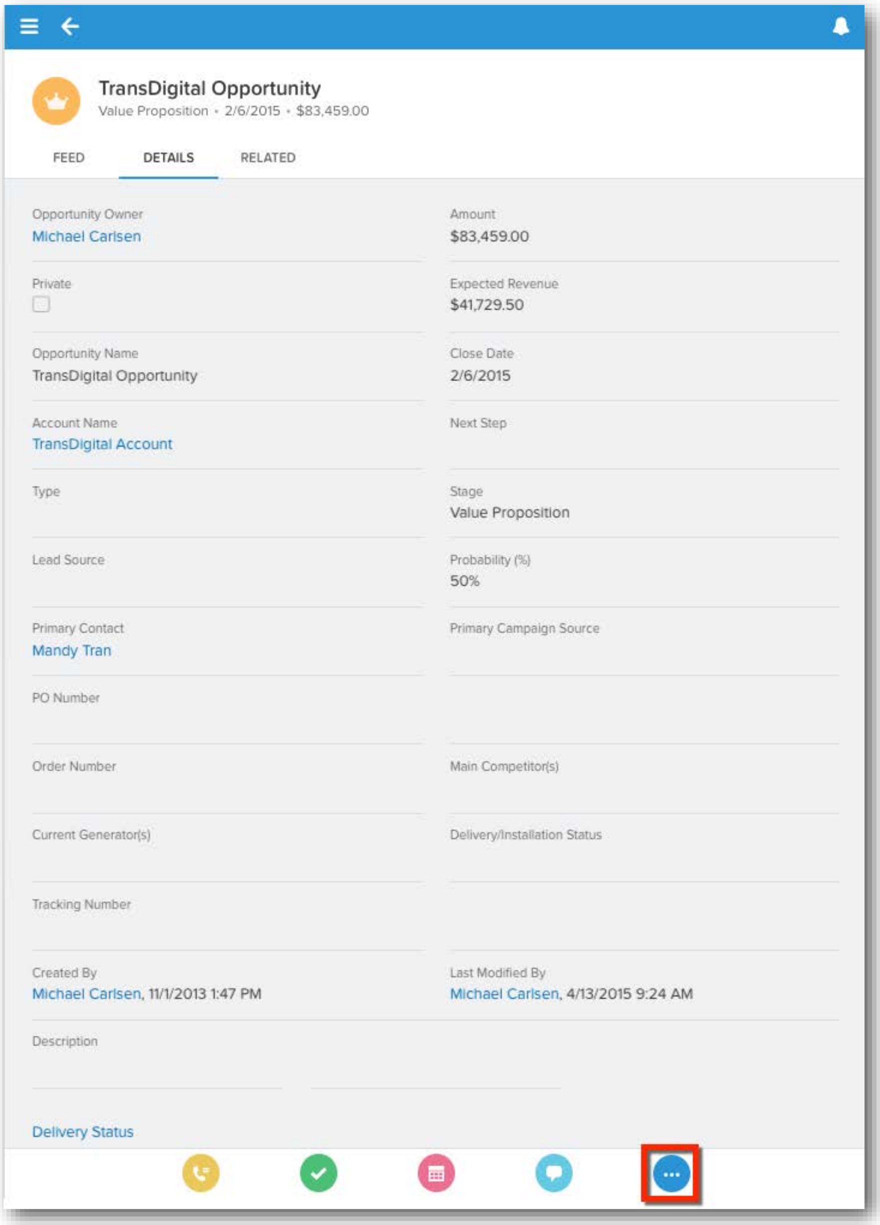
- If enabled, then when sending from the Adobe eSign Manager publisher action from the specified Master Object (e.g., Lead, Account, Contact, Opportunity, Contract), the agreement template will be available. If you have more than one agreement template enabled for that object, then there will be a dropdown that shows senders the option to select a template.



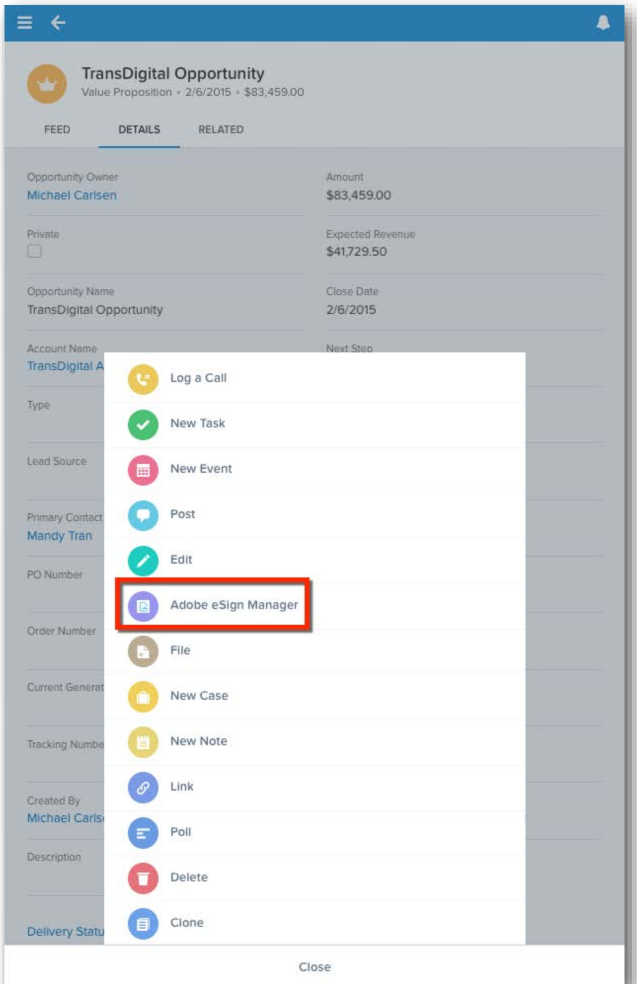
- If your Master Object is blank in the agreement template but you make it available for publisher actions, that will enable it to show up when your senders use the Home page Chatter feed eSign services action or the primary set of actions from the Salesforce1 homepage.
- If you enabled 'Auto Send' for your agreement template, eSign services will send the agreement immediately once you hit the Send button.

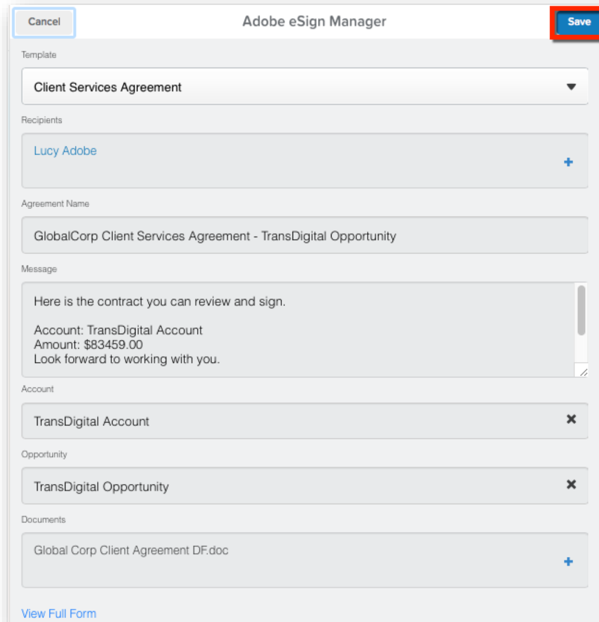
Using eSign Services Send Action from Salesforce1

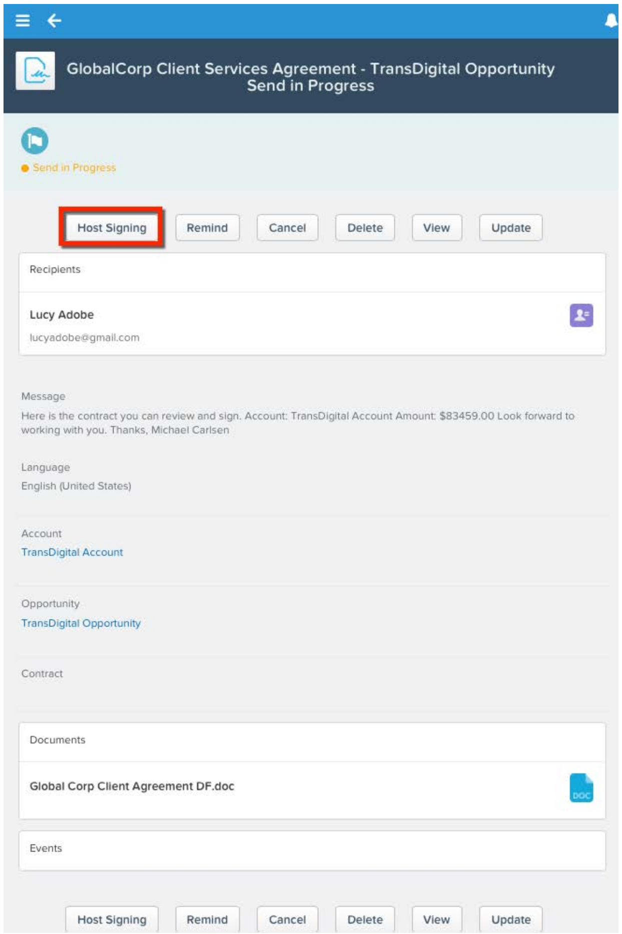
If you have enabled the eSign Manager publisher action, you can access that from the Home page or enabled Object (e.g., Opportunity) directly from the Salesforce1 mobile apps for iOS or Android. Just click the icon from Salesforce1 and then click on the eSign Manager icon to view the new agreement record.



Click on the eSign Manager action to pull up a new agreement record. If an agreement template was set up, then the new record will be prepopulated with information from the agreement template.







From Salesforce1, you can also get in-person signatures by click on the Host Signing button on the agreement record. By doing so, you can hand your device over to the signer to fill out the document and apply a signature. Additionally, all the Chatter updates related to the agreement process can be tracked in Salesforce1.


Adobe EchoSign
Get Help
GlobalCorp Client Services Agreement - T...
2
globalcorp
CLIENT SERVICES AGREEMENT
Client Information
Company Name
TransDigital Account
Address
11300 Main Street
San Jose , CA 95110
Contact
Mandy Tran
Phone
(888) 888-8888
Email
mandytran132@gmail.com
Fax
(888) 333-6666
Website
http://www.transdigitalcorp.com
Order Number
3981904
Client Services
Investment
New Customer Program
• New client onramp
• Survey evaluation
• Set up properties and processes
• Connect to vendor channels
• Marketing services
• Staff training
• Customer service 24/7/365
$ 83459.00
Enter Payment Information
PO Number
Next
TERMS AND CONDITIONS
Terms and Renewal: The initial term of this Agreement is twelve (12) months, commencing upon the execution date of this Agreement. Thereafter, the Agreement will automatically renew in successive twelve (12) month terms unless either party gives written notice to the other at least sixty (60) days prior to the end of the then current term, stating its intent to terminate this Agreement.
Gold Standard of Service/60 Minute Guarantee: GlobalCorp guarantees to respond to any Company customer support request within sixty (60) minutes. This does not guarantee resolution of the request/problem only confirmation of the request. The guarantee only applies to GlobalCorp customer support communication. GlobalCorp provides customer


Place Your Signature
Jackson Parke
Jackson Parke
Cancel
Apply

Advanced Signer Authentication Methods

When signers receive documents to sign or approve, you can add an additional layer of authentication before they can view the document. Often times, adding a password to sign the agreement is sufficient but in other cases, more advanced verification methods may be desired.

In addition to the default email authentication method, eSign services for Salesforce supports four per recipient identity verification methods:

- **Knowledge Based Authentication**—Recipients answer questions to verify their identity. See Knowledge Based Authentication (KBA) for more information
- **Social Identity**—Recipients sign in with Facebook, Google, LinkedIn, Google, or another service before signing. See Social Identity Authentication for more information.
- **Password**—Recipients enter a password to sign agreement.
- **Phone Authentication**—Recipients are sent an automated text (SMS) message or phone call with the required code. This is controlled using the **Enable Phone Authentication** setting. See Phone Authentication for more information.

Per recipient authentication methods are controlled using the *Enable Per Signer Identity Verification* setting.

If you don't want to apply recipient authentication at the most granular level, you can also apply these verification methods for internal or external signers or all signers. (e.g., External signers need verify their identity using Knowledge Based Authentication while internal signers need to verify using a password.) This is controlled using the *Enable Separate Signer Identity Methods* setting.

To take advantage of these identify verification methods, make sure you have the Document Cloud Custom Settings set for knowledge based authentication and social identity set accordingly. See Custom Document Cloud Settings for more information on each of the following:

- **Disable Knowledge Based Authentication**—Check this box to hide the Knowledge Based Authentication (KBA) identity verification option for agreements. This is a signer identity verification method that requires signers to provide and verify personal information to sign the document. Usage of this feature is limited and may incur added costs. Also, make sure your account send settings on echosign.adobe.com have KBA enabled so you can use it in Salesforce.
- **Disable Social Identity Verification**—Check this box to hide the web identity verification option for agreements. Web identity verification requires signers to verify their identity by signing into one of the following sites: Facebook, Google, LinkedIn, Twitter, Yahoo!, or Microsoft Live. Also, make sure your account send settings on echosign.adobe.com have web identity enabled so you can use it in Salesforce.
- **Enable Separate Signer Identity Methods**—Check this box to enable the option to select different identity verification methods for recipients in your eSign services account and those outside of your eSign services account. For example, you can require that a customer be verified with Knowledge Based

Identity before signing the document but require that your sales manager instead provide a password to sign the document. If you don't check this box, then all signers or approvers will verify using the same method, as selected by the sender.

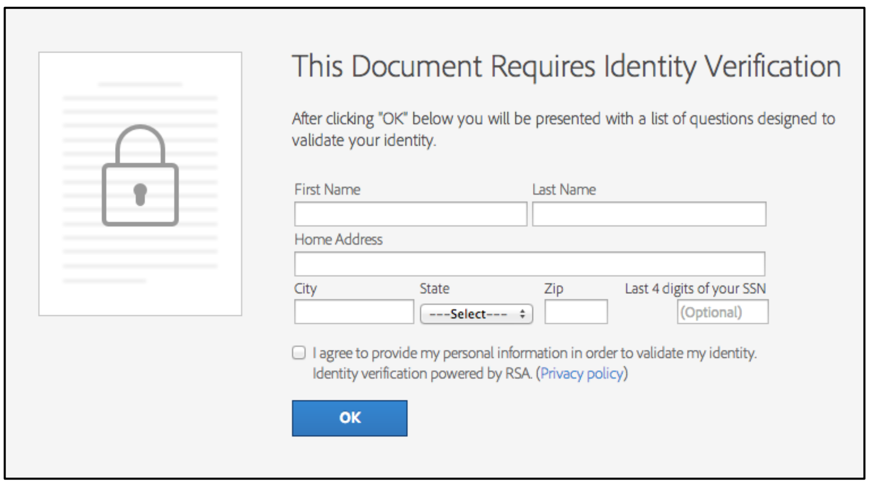
- **Enable Per Signer Identity Verification**—Enable this setting to allow each signer to have a different identity verification method. (e.g., password, phone, social identity, KBA).
- **Enable Phone Authentication**—Enable this setting to show the phone authentication option for verifying recipient identity. Usage of this feature is limited and may incur added costs.

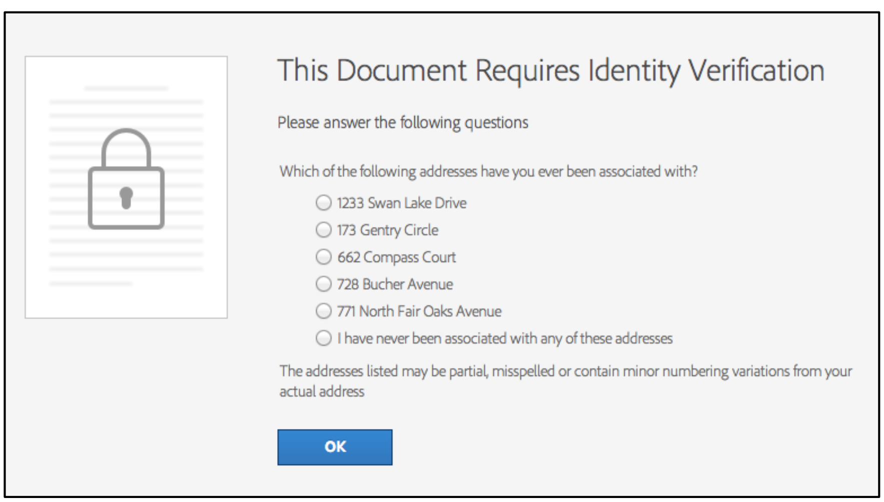
Knowledge Based Authentication (KBA)

Knowledge Based Authentication (KBA) requires signers and approvers to prove their identity by answering questions taken from hundreds of public and commercial databases. This functionality is powered by RSA and only available in the United States.

When verified, the name associated with the signature is taken from the user's authenticated name and cannot be changed at the time of signing. The audit trail captures identity verification details.

KBA usage is limited per account, per month or year. Contact Sales for more information.

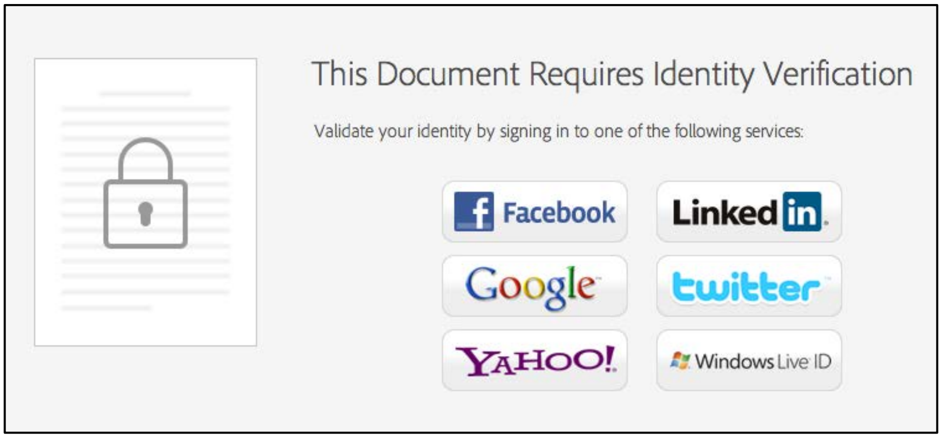


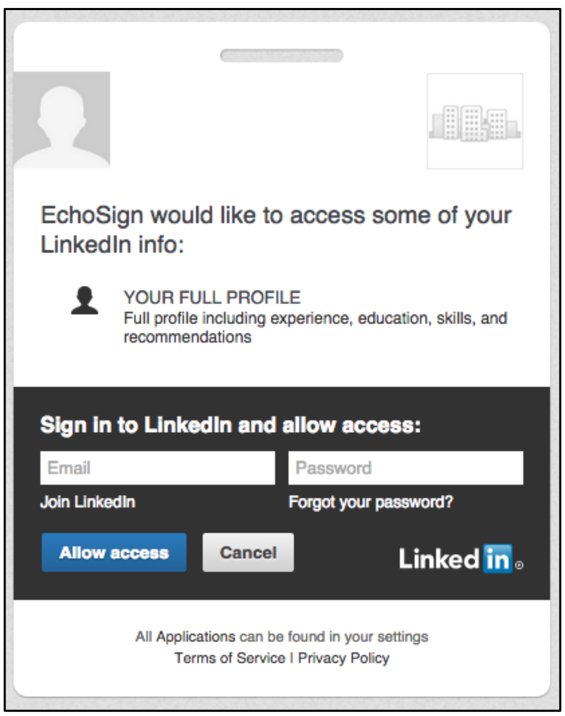


Social Identity Authentication

Social identity authentication requires signers and approvers to prove their identity by authenticating through a 3rd party Web service such as Facebook, Google, LinkedIn, Microsoft Live, Twitter, or Yahoo!

When verified, the name associated with the signature is taken from the user's authenticated name and cannot be changed at the time of signing. The audit trail captures identity verification details.





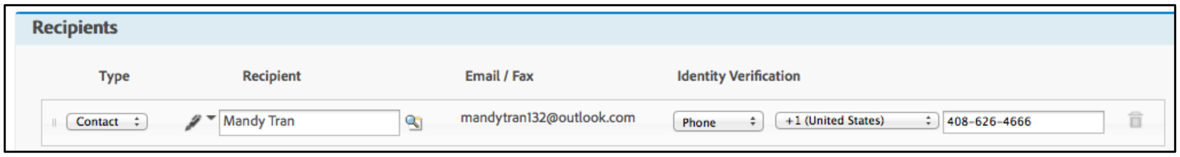
Phone Authentication

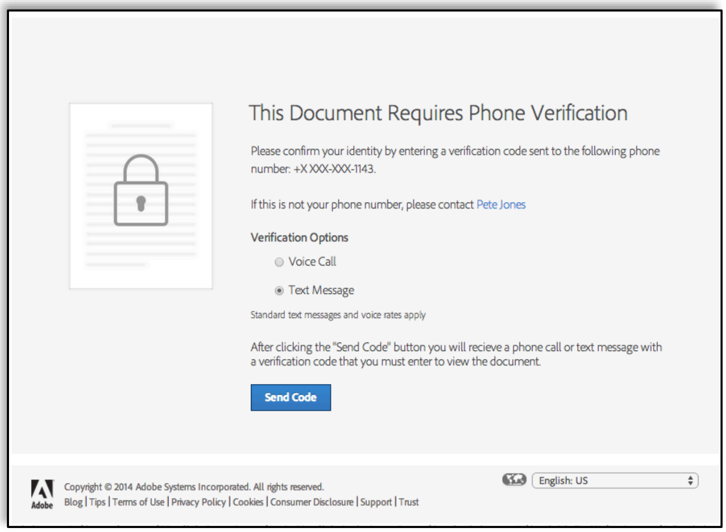
Phone authentication is another method of signer identity verification that offers a streamline, mobile friendly method to enable two-factor authentication.

Signers will be prompted to enter a verification code before they can view and sign the agreement. They can request the send a verification code via voice or SMS text message to their phone number.

Phone authentication usage is limited per account, per month or year. Contact Sales for more information.

Also on the Agreement page, the phone number for a lead, user, or contact recipient defaults to the mobile phone number associated with that person in Salesforce. You can overwrite that by specifying another phone number instead.





eSign Services Integration with other Salesforce Apps

Adobe Document Cloud eSign services is integrated with several Salesforce apps that allow you to extend your Salesforce workflows even further. Learn more about each of these apps and get them on the AppExchange.

Advanced Document Generation

- Conga Composer
- Drawloop
- Thunderhead

Subscriptions & Billing

- Zuora

Contract, Proposal, and Quote Management

- Apttus
- BigMachines
- Selectica
- SpringCM

Additional Customizations

Configure Salesforce to Send Large Documents for Signature

Large documents are automatically supported for send transactions and background actions up to certain limits:

- **Send Transactions**—When clicking the **Send for Signature** button on the Agreements page, you can send a single document that is up to 4.0 MB or multiple documents whose summed size is up to 4.0 MB.
- **Background Actions**—When sending document using background actions, a single document up to 9.0 MB or multiple documents whose summed size is up to 9.0 MB can be sent. (See Background Actions for more information.)

If you need to send larger documents, you must do the following:

- Set Up and Configure the EchoSign Callback Site
- Add the EchoSign Callback URL to Custom Settings
- Customize the Profile for Your EchoSign Callback Site
- Set the Attachment Service Invocation Count Field to Visible for All Profiles

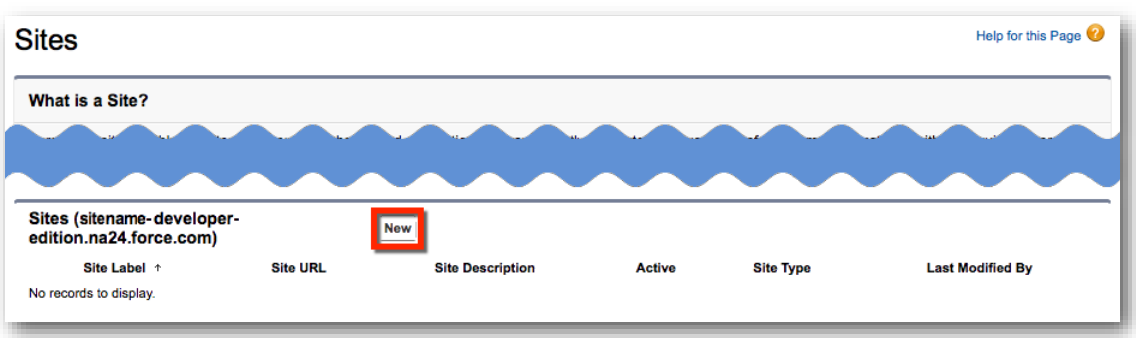
Note: Sending large file transactions (as defined above) for signature **is not** supported in Salesforce Professional Edition. If you are using Salesforce Professional Edition, skip this section. Then complete the installation by following the steps in the section eSign services for Salesforce Professional Edition - Additional Installation Steps.

Setting Up and Configuring the EchoSign Callback Site

You must set up and configure a site for EchoSign Callback so that agreement updates can be pushed to Salesforce in a timely manner.

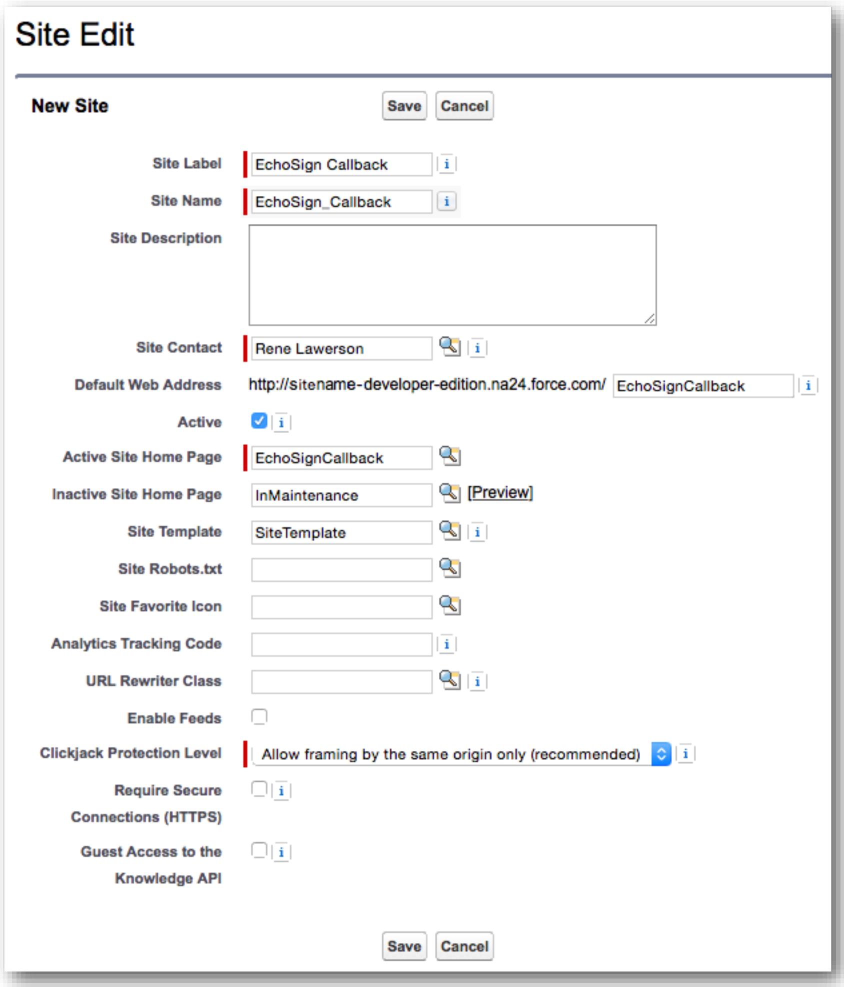
Note: If you have not used Salesforce sites in your Salesforce org, you must first register a Force.com domain name that will be used for all your Salesforce sites in the account. (See Registering a Custom Force.com Domain in the Salesforce.com help). Keep in mind that if you are registering a new domain name, it is recommended that you don't have a very long domain name or the secure web URL may exceed the 255 character limit that eSign services has for callback URLs.

1. Click **Setup** then navigate to **Build | Develop | Sites**.
2. Click the **New** button.



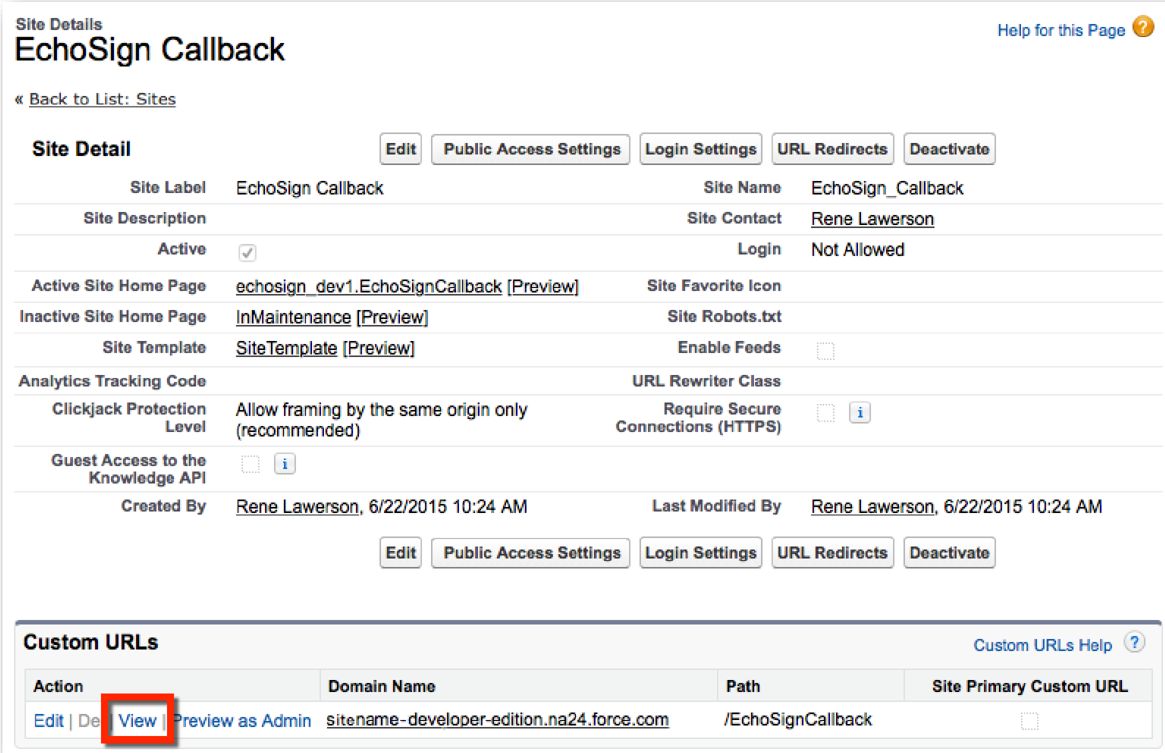
3. In the Site Edit page, do the following:
    a) Set the 'Site Label' value to: EchoSign Callback.
    b) Set the 'Site Name' value to: EchoSign_Callback.
    c) Set the 'Site Contact' value to a Salesforce user who will receive notifications about Sites. In most cases, this would be the account admin.
    d) Set the 'Default Web Address' value to: EchoSign Callback.
    e) Enable the 'Active' control.
    f) Set the 'Active Site Home Page' value to: EchoSign Callback

    The fields should look like this:

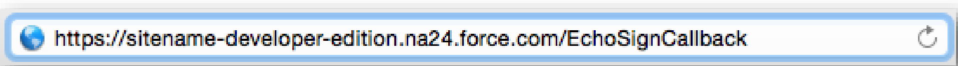


4. Click **Save** to continue.

5. In the *Custom URLs* section, click the **View** link.



6. Copy the value of the URL in your browser window into a text file. If you are testing on Sandboxes, copy the http URL and not the https URL. Your URL should look something like the URL shown below.



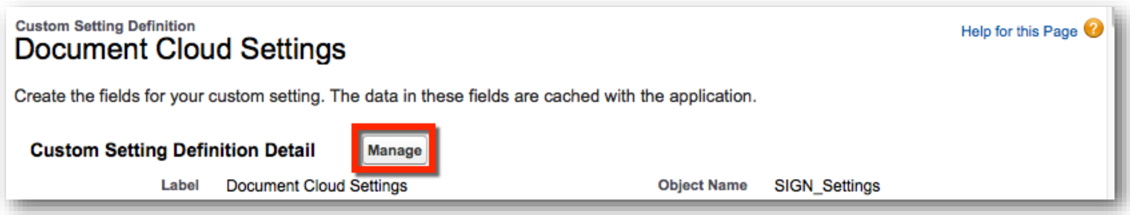
Note: You will need this URL to set up your custom settings.

Adding the EchoSign Callback URL to Custom Settings

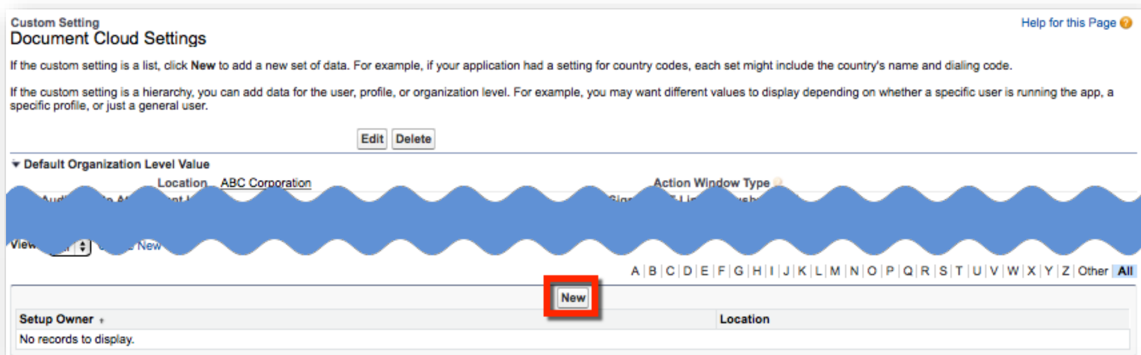
You must next configure your custom settings using the URL for your EchoSign Callback site.

1. Click **Setup** then navigate to **Build | Develop | Custom Settings**.
2. Click the **Document Cloud Settings** link.

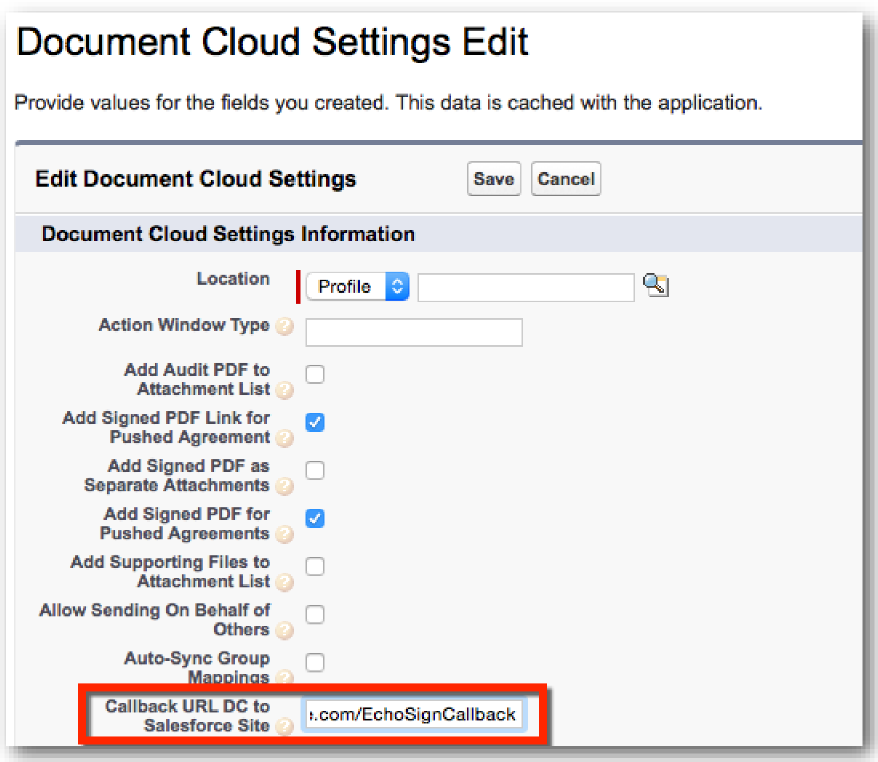
3. Click the **Manage** button.



4. Click the **New** button.



5. Set the *Callback URL DC to Salesforce Site* value to the value of the 'Secure Web Address' you copied after configuring your EchoSign Callback site (see Step 6 above). Make sure the address prefix is 'https' and not 'http'.



6. Click **Save** to save your settings.

Customizing the Profile for Your EchoSign Callback Site

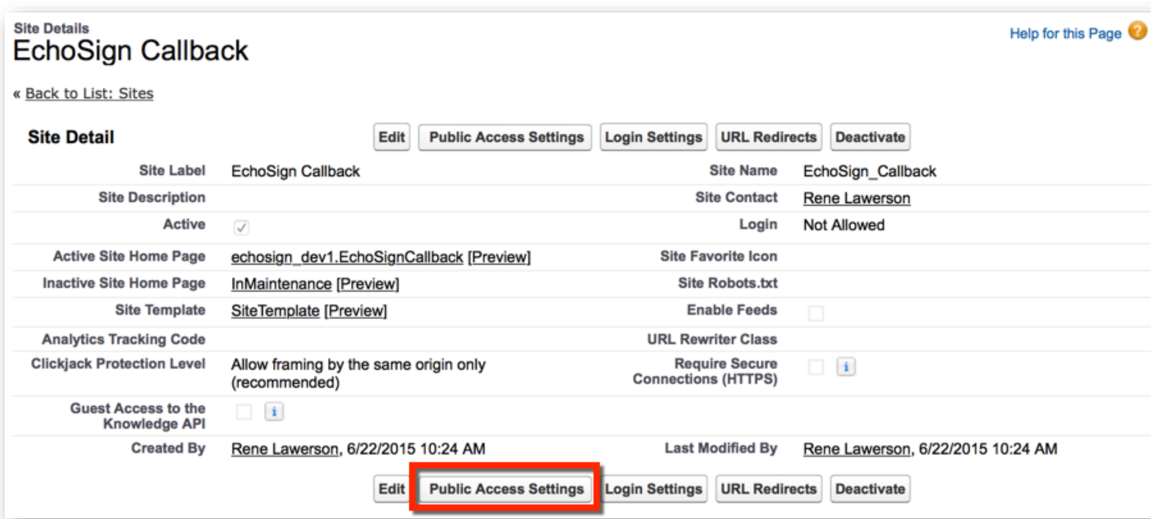
You must also customize the profile for your EchoSign Callback site as follows:

- Add the AgreementAttachmentService Apex class so it is visible
- Enable the agreement object and field permissions if necessary
- Optionally, add IP Addresses for the EchoSign Callback Site

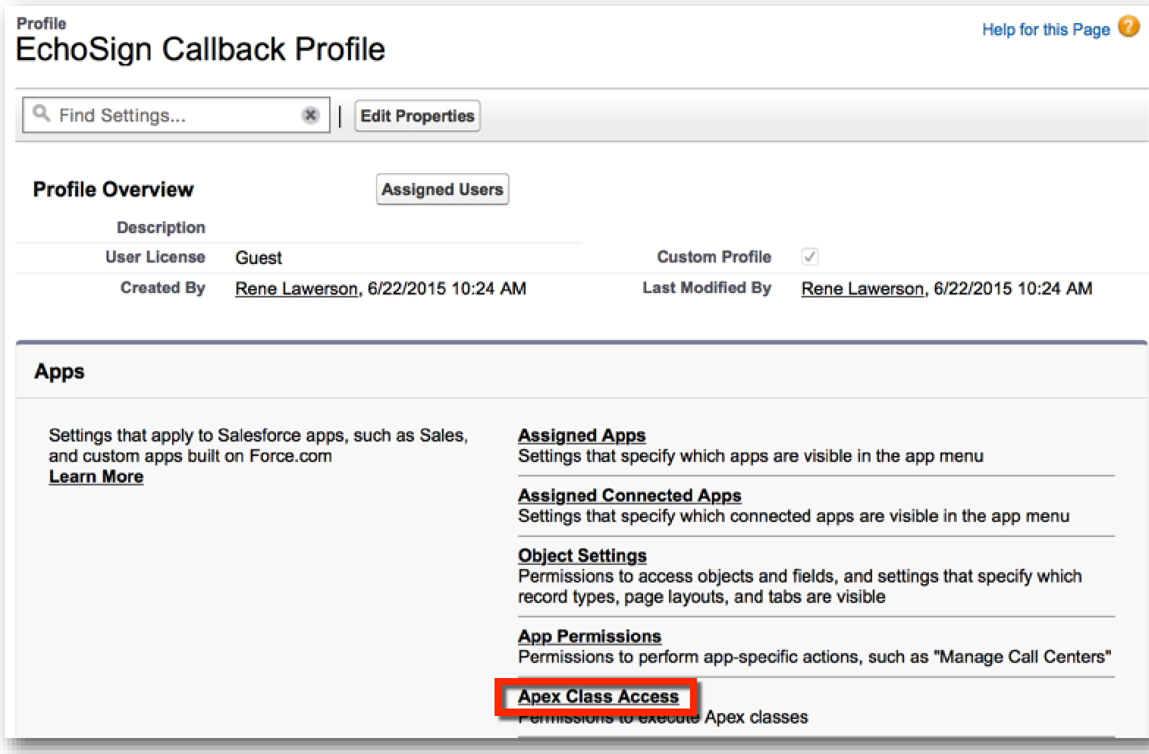
Note: The following steps reflect the enhanced profile interface. (See Profiles Overview in the Salesforce.com help for more information on the profile interfaces.)

1. Click **Setup** then navigate to **Build | Develop | Sites**.
2. Click **EchoSign Callback**.

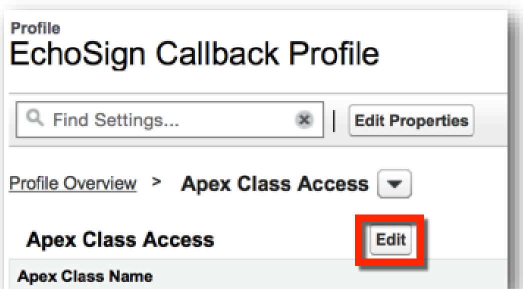
3. Click **Public Access Settings**.



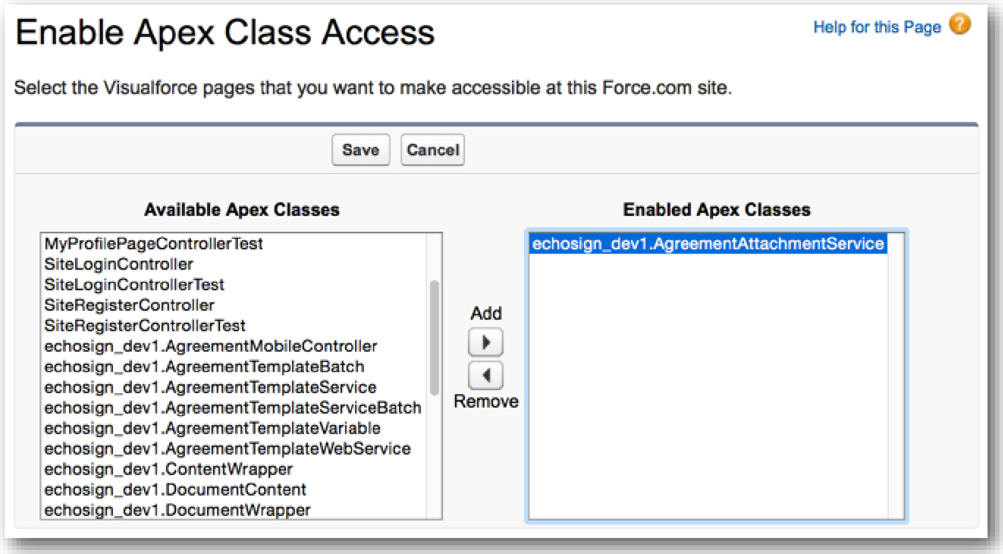
4. To add the AgreementAttachmentService Apex class, do the following:
   a) Click the **Apex Class Access** link.



Then click **Edit**.

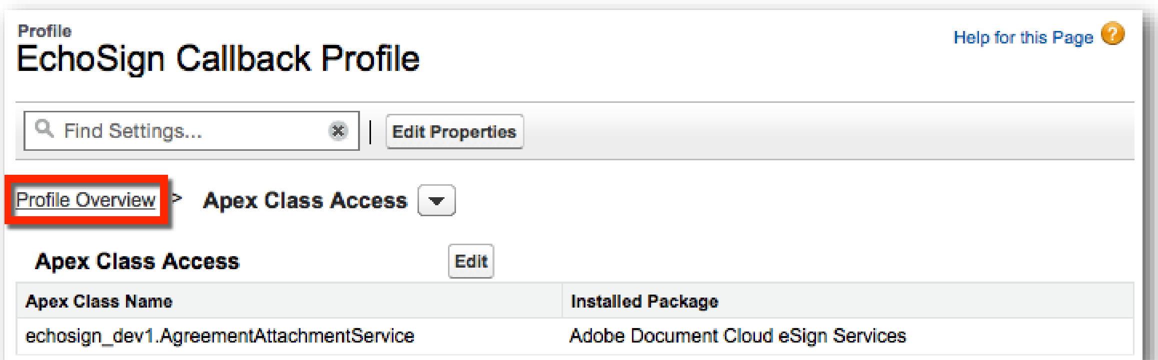


b) From the ‘Available Apex Classes’ list on the left, select the ‘echosign_dev1.AgreementAttachmentService’ and click **Add** to move it to the ‘Enabled Apex Classes’ list on the right as shown below.

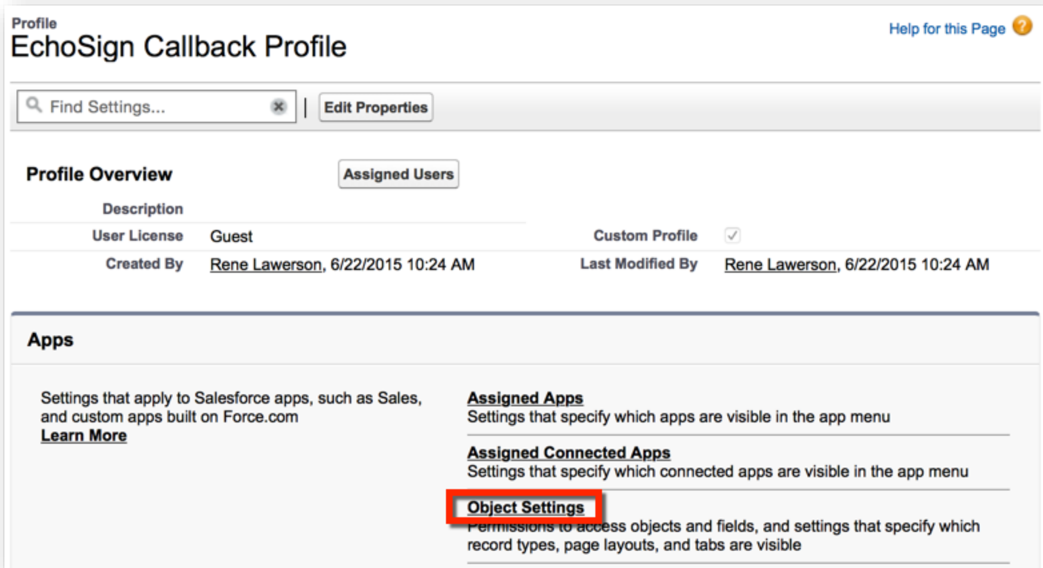


c) Click **Save**.

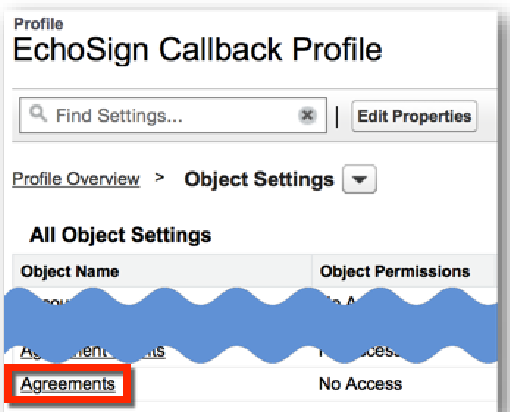
d) Click **Profile Overview** to navigate back to the Profile page.



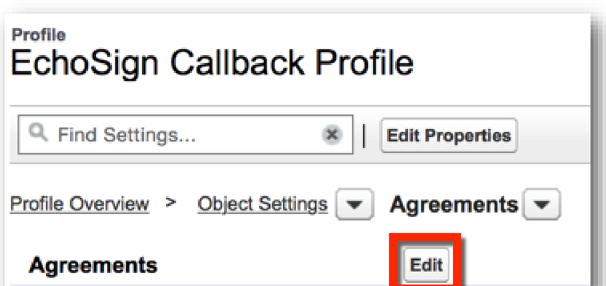
5. To enable Object and Field Level Permissions for the EchoSign Callback Site Profile, do the following.
   a) Click the **Object Settings** link.



   b) Click **Agreements.**

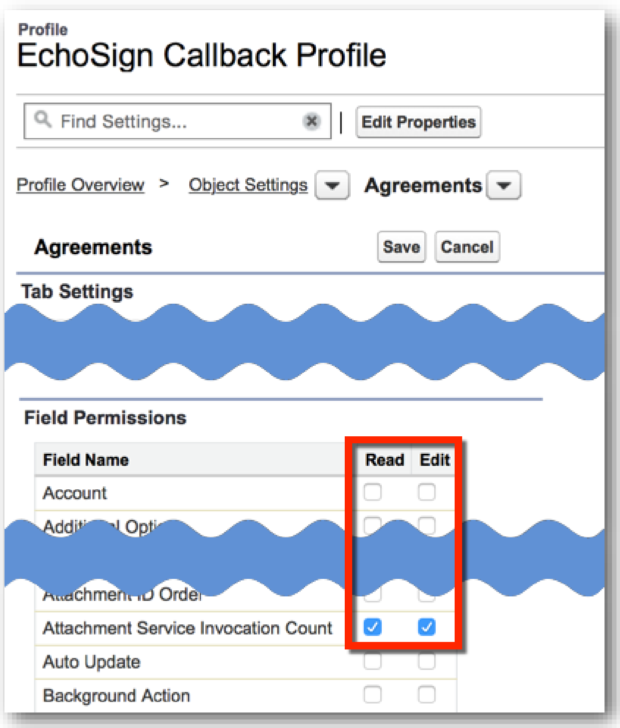


   c) Click **Edit**.



d) Enable all the object permissions (*Read, Create, Edit, Delete, View All, Modify All*).

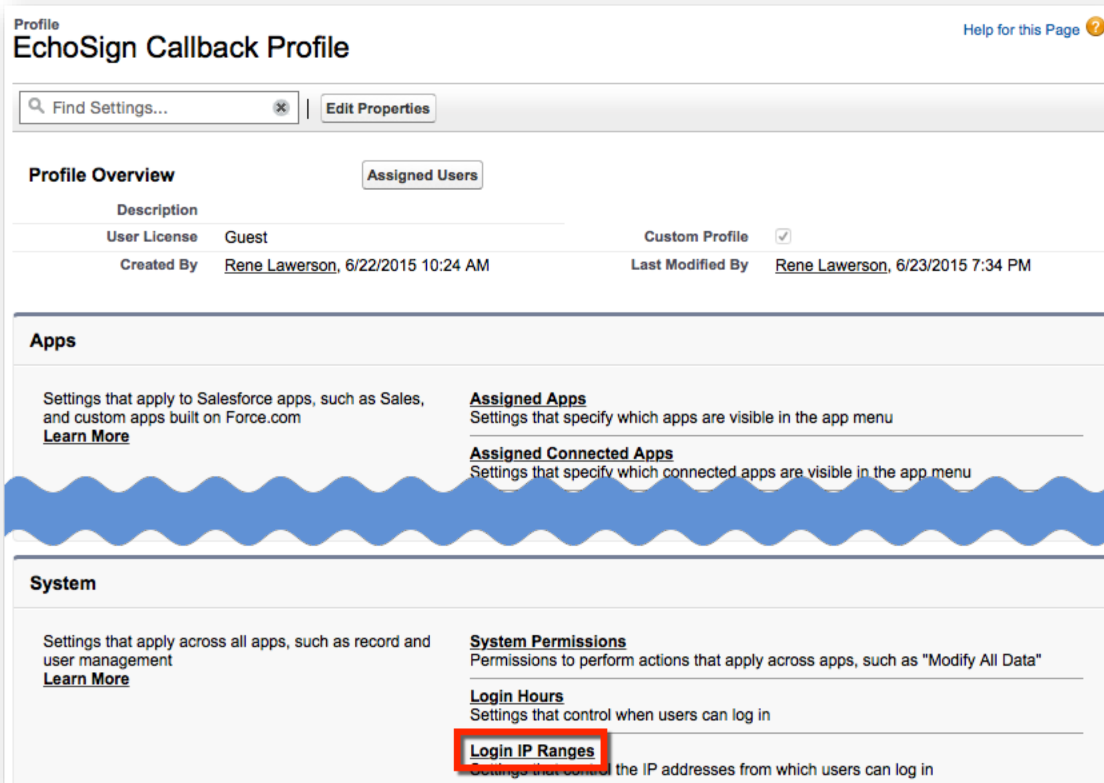
e) Scroll to the Field Permissions section and sent the permissions to Read and Edit for the 'Attachment Service Invocation Count' field.



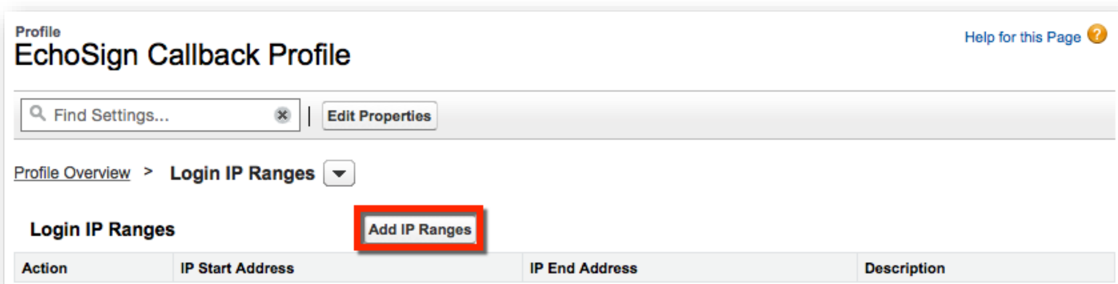
f) Click **Save** to save both the Object Permissions and the Field Permissions.

g) Click **Profile Overview** to navigate back to the Profile page.

6. Optionally, for additional security you can add the IP ranges for public access settings in the Site so that it is restricted properly to eSign services IPs.
   a) Click the **Login IP Ranges** link.

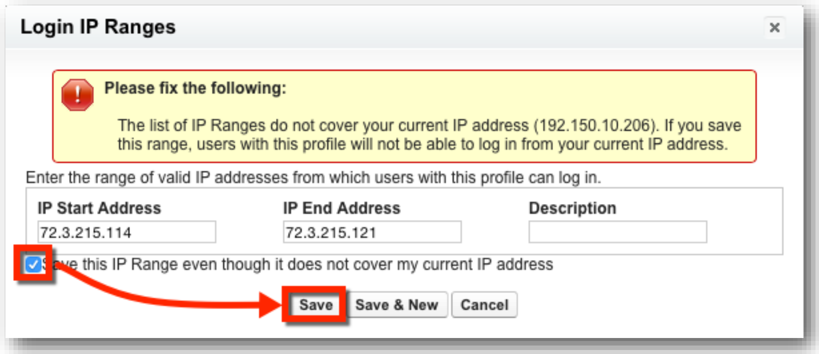


   b) Click **Add IP Ranges**.



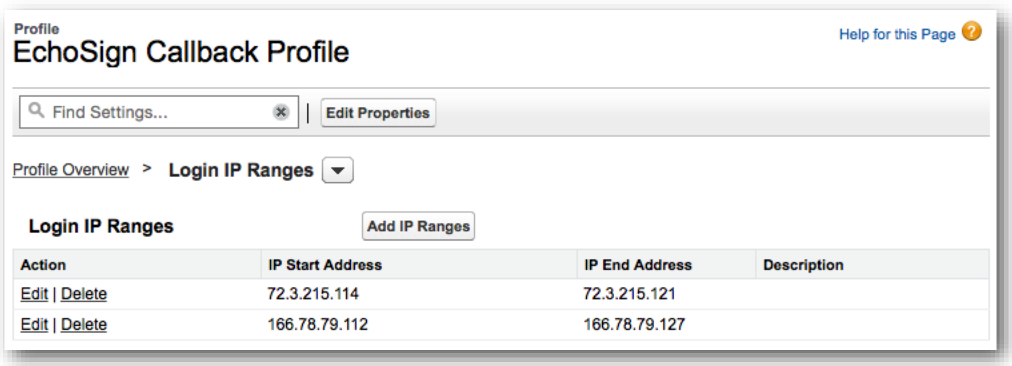
   c) In the *Login IP Ranges* dialog, enter the first IP address range: Start IP Address: 72.3.215.114 and End IP Address: 72.3.215.121 then click **Save**.

Note: If the error "The lost of IP Ranges do not cover your current IP address…." Displays, enable the 'Save this IP Range even though it does not cover my current IP address" option and click **Save** again.



d) Repeat steps i-iv above for the second IP address range: Start IP Address: 166.78.79.112 and End IP Address: 166.78.79.127.

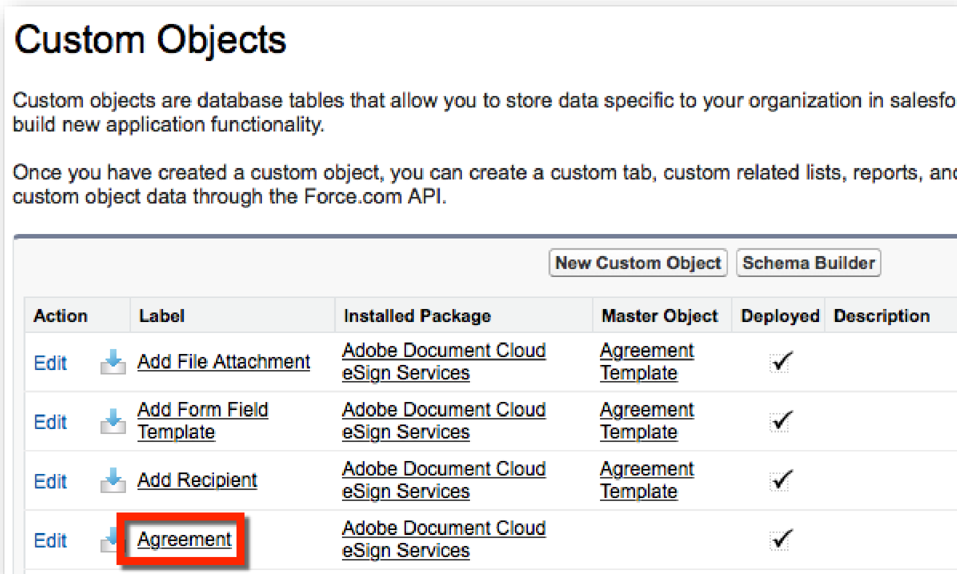
The final Login IP Ranges for the EchoSign Callback Site should display as follows:



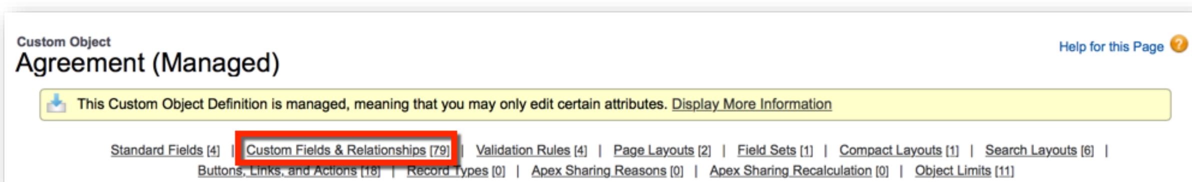
Set the Attachment Service Invocation Count Field to Visible for All Profiles

You must also ensure that the "Attachment Service Invocation Count" field is editable by the relevant profile by doing the following.

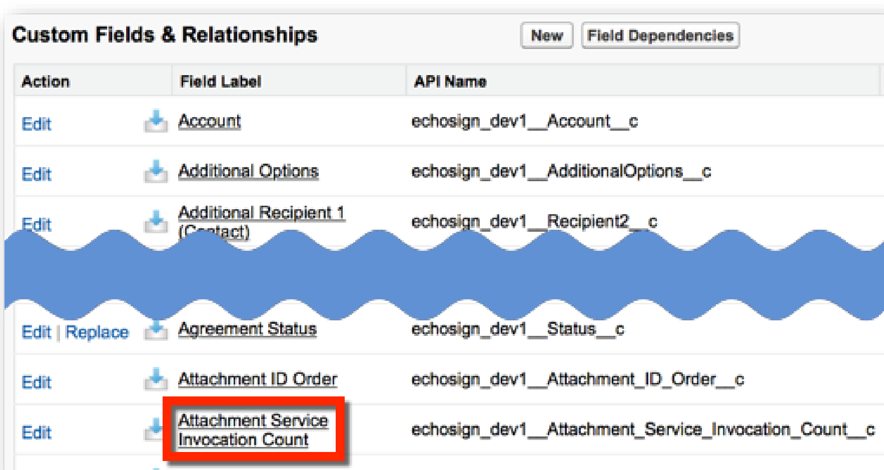
1. Navigate to **Build | Create | Objects**.
2. Click the **Agreement** link.



3. Click the **Custom Fields & Relationships** link at the top of the page to navigate to that section

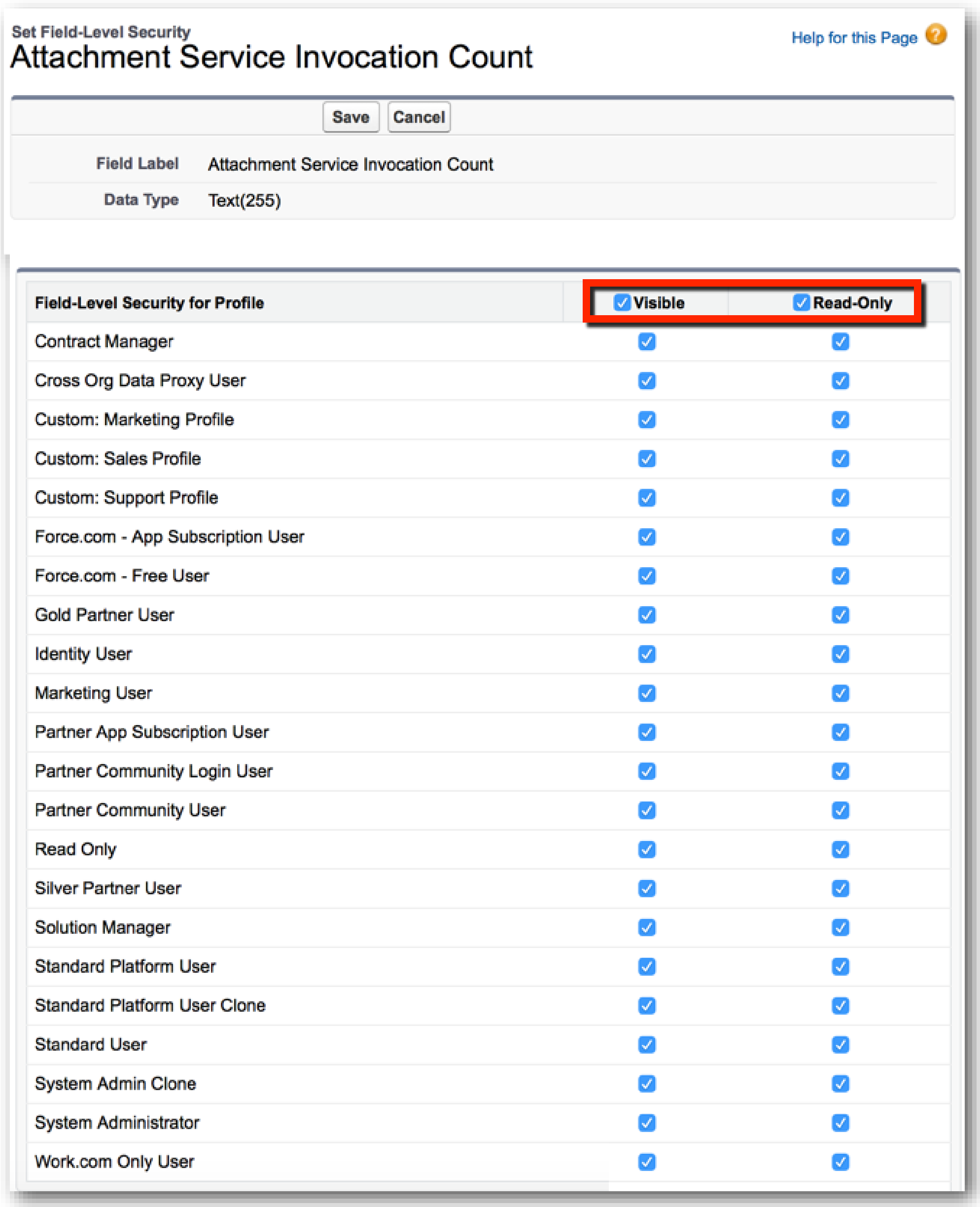


4. In the *Custom Fields & Relationships* section, click the **Attachment Service Invocation Count** link.



5. Click the **Set Field-Level Security** button.

6. Enable *Visible* and *Read-only* at the top-level to enable field level security for all profiles listed.



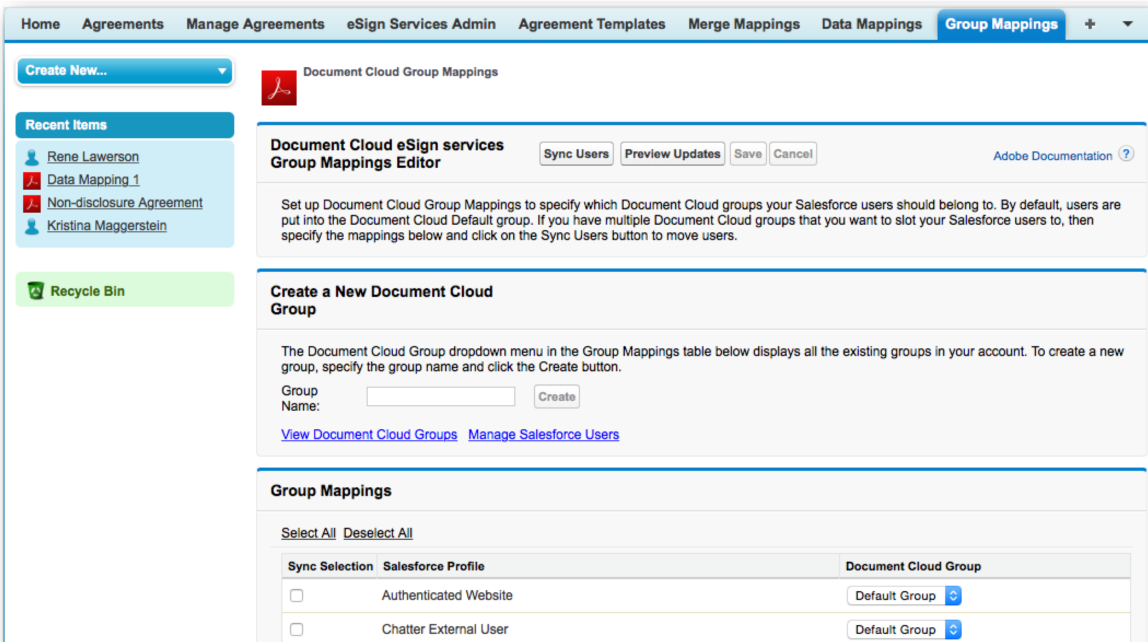
7. Click the **Save** button.

Manage Group Mappings

eSign services for Salesforce supports the ability to easily synchronize users in specific Salesforce profiles to Adobe Document Cloud eSign services groups. Groups are often used by companies to group users in the eSign services account into different areas (e.g., Sales US, Sales Europe, Sales Asia Pacific). By having different groups, you can create different settings in Adobe Document Cloud eSign services or generate reports separately by group. If you don't have multiple groups, you can skip this section since all of your users will belong to the Default group.

If you choose not to use this feature, skip this section.

In Salesforce, you can set up mappings between Salesforce profiles and groups by using the Group Mappings page. You can also create new groups directly within Salesforce.



Move Users to Different Adobe Document Cloud Groups

You can map multiple Salesforce profiles to a single Document Cloud group. To set up Group Mappings and move users to their respective groups, do the following:

1. Create one or more mappings between a Salesforce Profile and a Document Cloud Group.
2. Enable the *Sync Selection* option for any mapping row that you would like to Sync.
3. Click the **Save** button to save the mappings. Or click **Cancel** to discard your changes.
4. To move users to their respective groups, click the **Sync Users** button on the group mappings page. You will be first be shown a preview of users that will be moved before you confirm the synchronization by clicking on 'Sync Users' in the preview window.
5. After the sync, you will be shown a confirmation of which users were moved successfully.

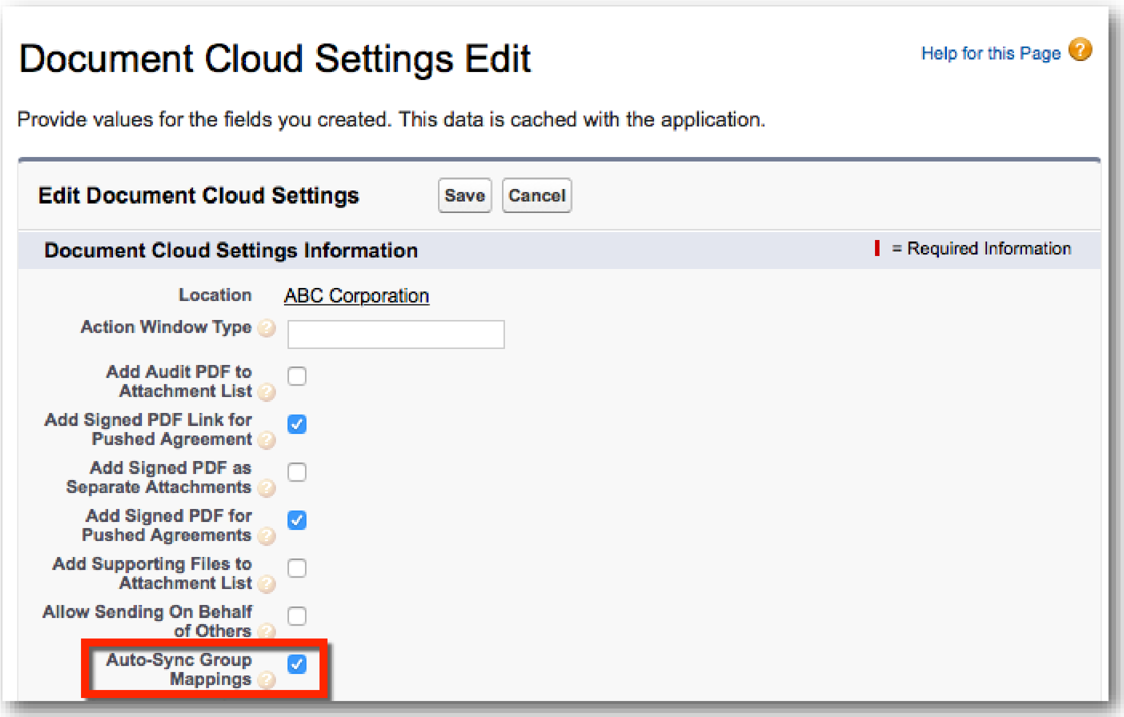
Note: Any Salesforce user in these profiles, who are not Adobe Document Cloud eSign services users, will not be affected by this synchronization. Also, any new user created when using eSign services for

Salesforce will be created automatically into the correct group mapping based on the saved mappings that have been checked for Sync Selection,

Auto-Sync Users When Salesforce Profile Changes

There is an optional setting you can turn on to automatically sync users when their Salesforce profile has changed from one profile to another profile. This will enable the feature that will move the users automatically when their profile changes. (e.g., from Marketing profile to Sales profile) The synchronization will move the user to the correct Document Cloud group based on the mappings saved and selected on the Group Mappings page

1. Click **Setup** then navigate to **Build | Develop | Custom Settings**.
2. Click the **Manage** Action for **Document Cloud Settings.**
3. At the top of the *Document Cloud Settings* page, click the **Edit** button.
4. Enable the *Auto-Sync Group Mappings* option then click **Save**.

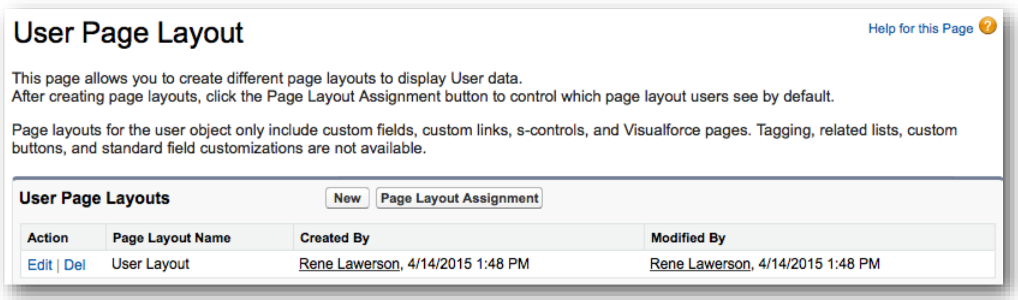


Manually Sync Users

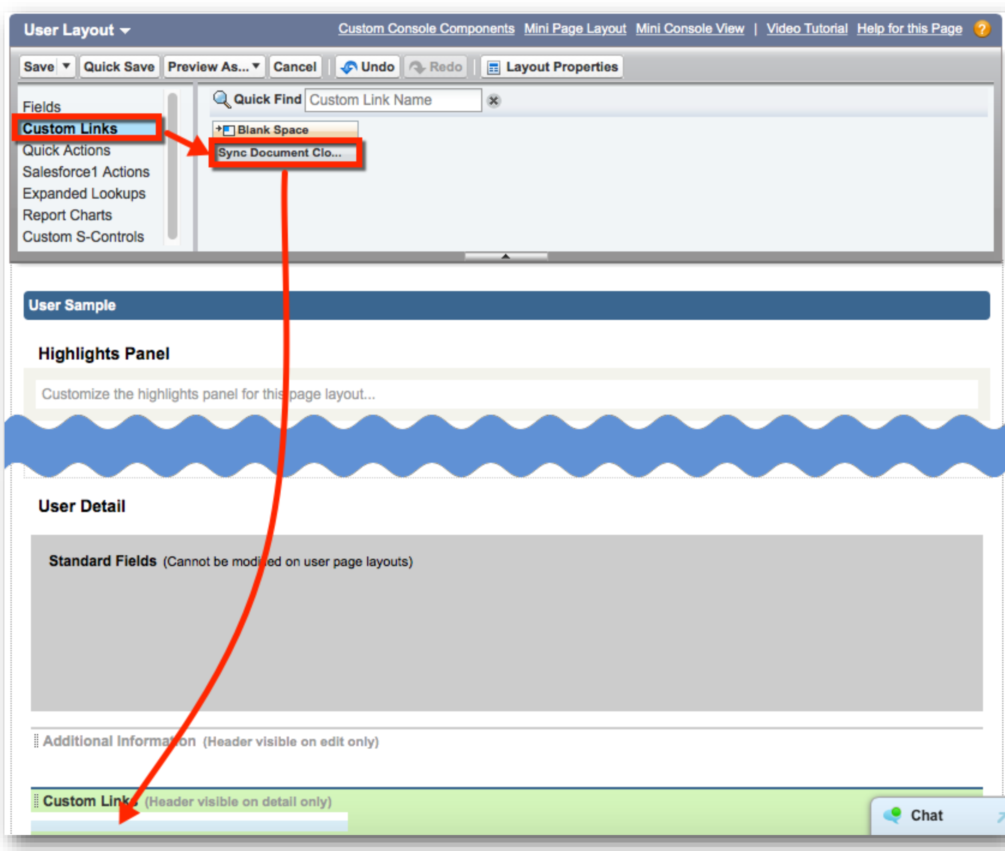
If you don't have the *Auto-Sync Group Mappings option* enabled, and you would like to manually sync a user's group from the User record, you can add a link on the User page layout which allows you to manually force the synchronization to move a single user to the correct Document Cloud group based on the mappings saved and selected on the Group Mappings page.

To add this sync link on the User page layout do the following:

1. Click **Setup** then navigate to **Build | Customize | Users | Page Layouts**.
2. Click the **Edit** Action for User Layout.



3. Click on **Custom Links** and drag the **Sync Document Cloud User** link from the top of the page to the *Custom Links* section of the page.



4. Click the **Save** button at the top of the page.

After adding this link, it will appear on every User detail page so that a manual sync of a single user can be done when the link is clicked. To move users in bulk, use the Document Cloud Group Mappings page to sync users.

Updating Salesforce with Push Agreements

You can use Adobe Document Cloud eSign API to send agreements for signature or create Widgets and embed them on your website and have all those agreements pushed and created in Salesforce.com just as if they were sent from Salesforce.com. You can also send agreements via the echosign.adobe.com web application and have them all pushed back to Salesforce.

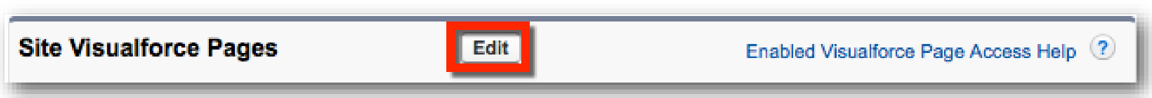
If you choose not to use this feature, skip this section.

Note: This feature **is not** supported in Salesforce Professional Edition.

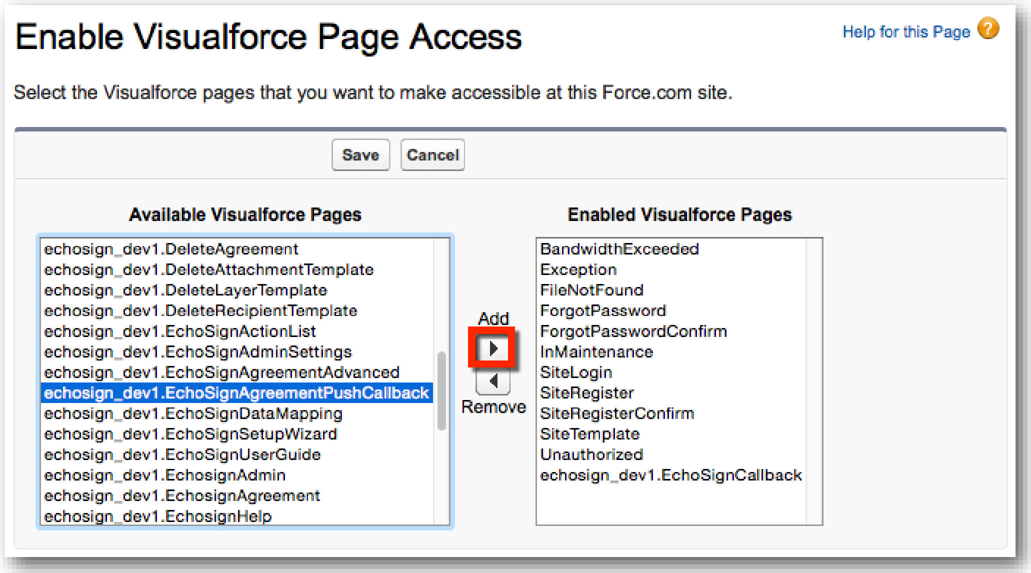
To enable this scenario, follow the following steps:

1. If you have not configured the EchoSign Callback Site, you will need to create a Salesforce Site to use this functionality. (See Configure a Callback Site for more information).
2. Click **Setup** then navigate to **Build | Develop | Sites**.
3. Click **EchoSign Callback.**

4. Scroll to the *Site Visualforce Pages* section then click **Edit**.



5. Scroll to locate ‘echosign_dev1.EchoSignAgreementPushCallback’, select it, then click **Add**.



6. Click **Save**.
   - **If you would like all of the agreements in your account that were sent outside of EchoSign to be created and pushed into Salesforce, follow these instructions:**
     - Copy the secure URL address from the EchoSign Callback Site you created and append ‘/echosign_dev1__EchoSignAgreementPushCallback’ to compose the callback URL. Contact Adobe Support (echosign@support.com) and provide them with your callback URL to set as your eSign services account's default callback URL. For example: If your site address is ‘https://echov11-developer-edition.na12.force.com/EchoSignCallback’, the callback URL will be ‘https://echov11-developer-edition.na12.force.com/EchoSignCallback/echosign_dev1__EchoSignAgreementPushCallback’
     - Adobe Support should also enter your EchoSign userID for the default callback URL API user setting. All accounts using Salesforce should also have their accounts set to append the document key to the callback URL.
   - **If you are sending agreements via the API, follow these instructions:**
     - Copy the secure URL address from the EchoSign Callback Site you created and append ‘/echosign_dev1__EchoSignAgreementPushCallback’ to create the callback URL to be used in the EchoSign API.
     - For example: If your site address is ‘https://echov11-developer-edition.na12.force.com/EchoSignCallback’,
       the URL you should use in the Adobe Document Cloud eSign API will be ‘https://echov11-developer-edition.na12.force.com/EchoSignCallback/echosign_dev1__EchoSignAgreementPushCallback’
     - When sending an agreement or creating a widget through the API you will need to provide a callback URL (see https://secure.echosign.com/redirect/latestApiMethods and reference the API parameter ‘CallbackInfo’.)
     - Also make sure that your account settings are set to append the document key to the callback URL that should be the default for Salesforce customers using eSign services. For any issues, contact Adobe support at support@echosign.com.

- Additionally, go to Push Mappings Settings to define preferences for how records are created when agreements are pushed to Salesforce.

Automation and Background Actions

Adobe Document Cloud eSign services for Salesforce has the ability to turn on background actions for agreements to automate workflows. This includes: sending agreements, sending reminders, updating agreement status, deleting agreements or canceling agreements.

Background Actions

- Through automatic workflows or triggers, Salesforce can automatically send a document for signature without additional user intervention. You can also set up trigger or workflows to send reminders and to delete, cancel, or update agreements automatically. To do so, you may need to allow users or workflows to send on behalf of another user.
- Background actions are enabled via an Agreement picklist field called 'Background Actions'. When the field switches from one value to another, the action is triggered. Make sure to trigger actions that are only allowed for the status of the Agreement. (E.g. you cannot send a reminder for an agreement that is already in the cancelled status.)
- Also, you can enable the 'Send for Signature' button to automatically send agreements using a predefined Agreement Template without requiring user to view the agreement page first. This is achieved by enabling the 'Auto Send' option on the Agreement Template. See Agreement Templates for more information.

Enabling 'Send on Behalf of' Functionality

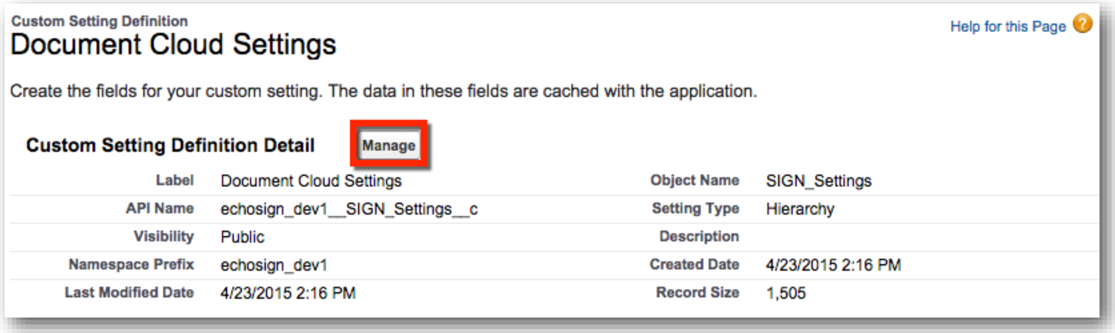
You may want to enable the 'Send on Behalf of' functionality if there are cases when someone in your Salesforce org is required to send agreements on behalf of another person. This feature works for any agreement sending including background sending, which is triggered through an update of the Agreement field 'Background Actions' or through the 'Auto Send' option in Agreement Templates. You can also set a lookup to a user in an Agreement Template to 'Send on Behalf of' so that it is automatically populated when the agreement is generated. The user you are sending on behalf of must be a user under the same account as the API key that was associated with your Salesforce instance.

Note: The ability to send on behalf of another user works only on EchoSign for Salesforce v11.7 or later.

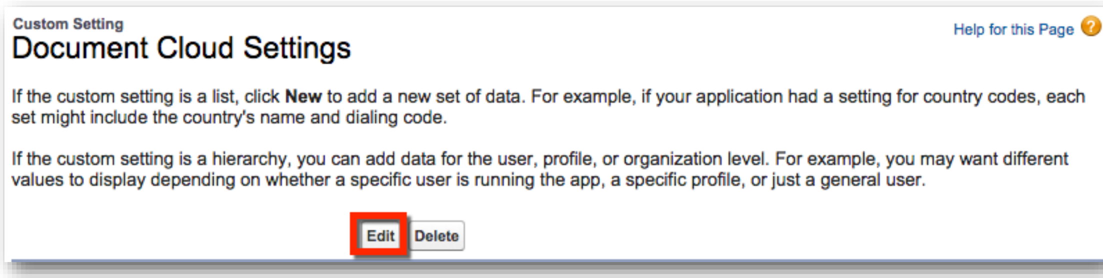
To enable the "Send on the Behalf of" functionality:

1. Enable the 'Allow Sending on Behalf of Others' setting by doing the following:
   a) Click **Setup** then navigate to **Build | Develop | Custom Settings** then click the **Document Cloud Settings** link. See Custom Document Cloud Settings for more information.

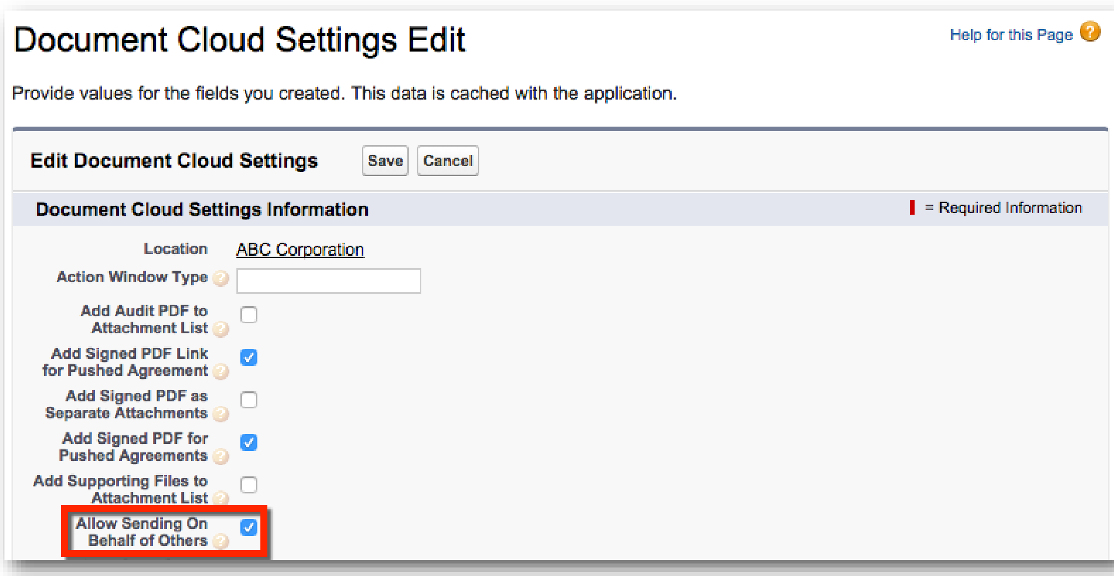
b) Click the **Manage** button.



c) Click the **Edit** button.



d) Enable the **Allow Sending On Behalf of Others** setting.



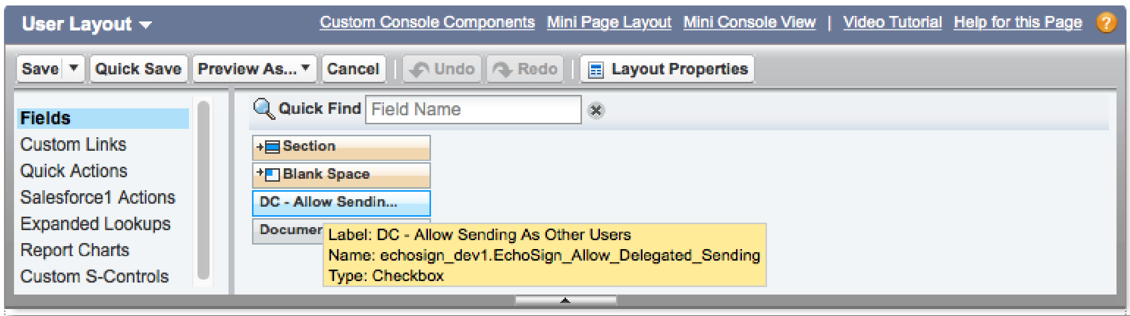
e) Click the **Save** button.

2. Add the 'DC – Allow Sending as Other Users' field to the User record layout by doing the following:

a) Click **Setup** then navigate to **Build | Customize | Users | Page Layouts.**

b) Click the **Edit** Action next to User Layout.

c) With **Fields** selected**,** click **DC – Allow Sending As Other Users** and drag it to the "*Additional Information (Header visible on edit only)*" section of the layout.



d) Click the **Save** button.

3. For the specific user that you want to send on behalf of, you must enable '*DC – Allow Sending as Other Users*' option as follows:

a) Click **Setup** then navigate to **Administer | Manager Users | Users**.

b) Click the **Edit** Action for the specific user.

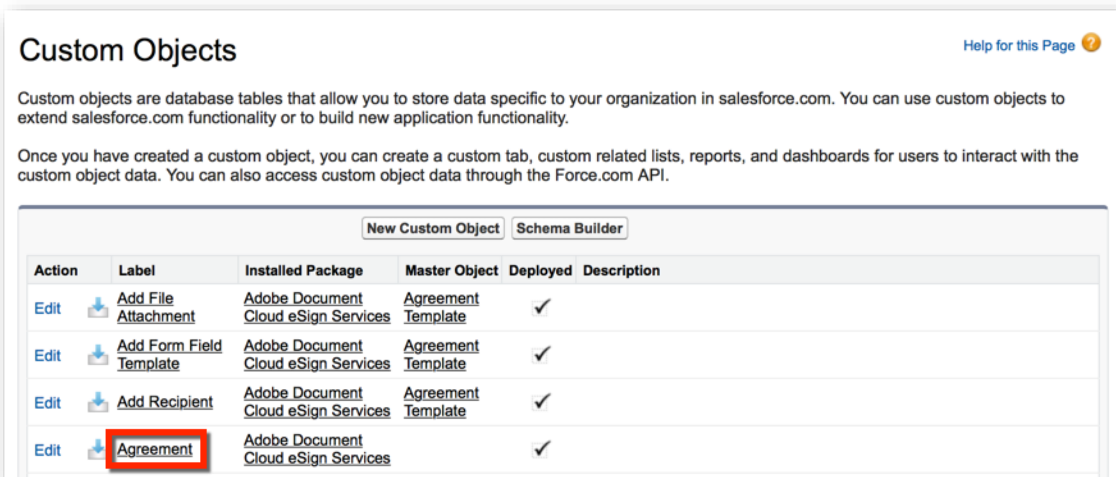
c) In the *User Edit* page, Additional Information section, enable the **DC – Allow Sending as Other Users** option.

d) Click the **Save** button.

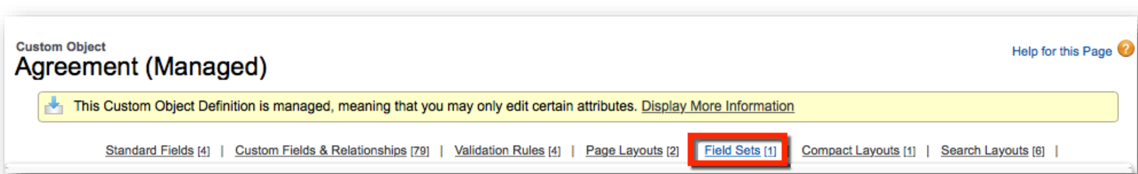
4. Add the 'Send On Behalf Of Others' field to the Agreement page layout by doing the following:

a) Click **Setup** then navigate to **Build | Create | Objects.**

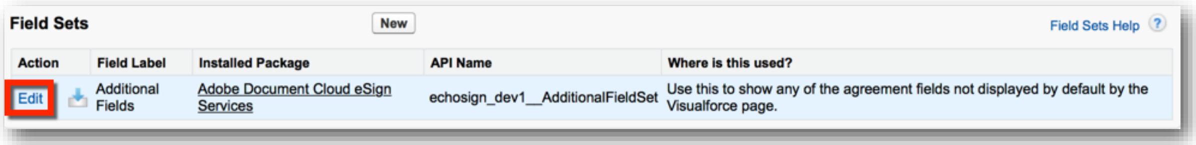
b) Click the **Agreement** link.



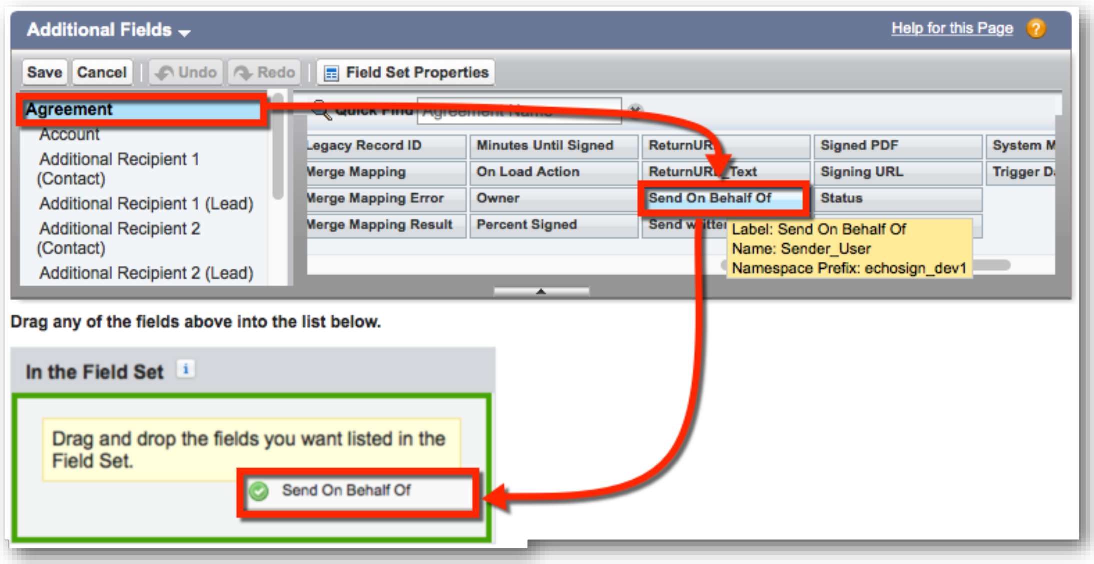
c) Click **Field Sets** at the top of the page to navigate to that section.



d) Click the **Edit** Action.



e) With **Agreement** selected, locate the **Send on behalf Of** field then click and drag it to the *In the Field Set* section.



5. When setting up the agreement to send, the field 'Send on Behalf of' needs to be populated with the user that has allowed other users to send on their behalf.

onLoadactions

Salesforce can automatically trigger actions via the onLoadAction URL parameter supported by eSign services for the Agreement button actions: Send, Remind, Delete, Cancel, Update, and View. The URL parameter will respect the Toolbar Settings set by the administrator so that only those that are enabled will be available.

Example of URLs with onLoadAction:

- **Send:** Make sure you have an agreement with status Draft in your account.
  https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=send
- **Remind:** Make sure you have an agreement with status Out for Signature in your account.
  https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=remind

- **Delete:** Make sure you have an agreement with status Out for Signature in your account.
  https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=delete
- **Cancel:** Make sure you have an agreement with status Out for Signature in your account.
  https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=cancel
- **Update:** Make sure you have an agreement with status Out for Signature in your account.
  https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=update
- **View:** Make sure you have an agreement with status Draft, Out for Signature, Signed, or Cancelled in your account.
  https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=view

Require Users to Sign-on to Salesforce to Access eSign Services Account

Through SAML (Security Assertion Markup Language) settings, eSign services can be integrated with Salesforce.com so that your users are required to log in to Salesforce.com to gain access to their eSign services accounts. This provides benefits in security and access control. For example if a user is disabled from Salesforce, they will not have access to their eSign services account.

To do so, Salesforce must be configured as a SAML provider and eSign services must be configured to use SAML so that only valid Salesforce.com users can log in to an eSign services account. The simple setup instructions can be found in the guide for setting up SAML.

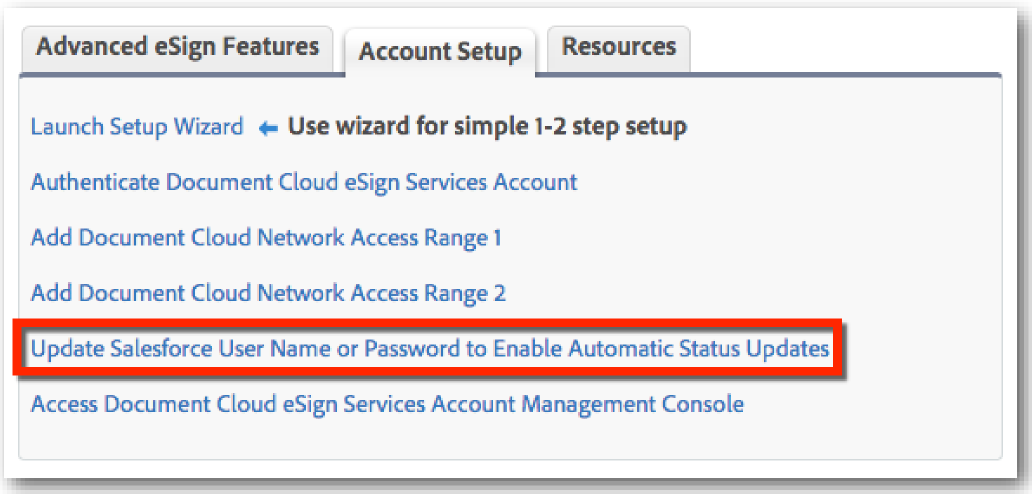
Granting Access to Additional Profiles

During installation, you may have only granted Administrators access to eSign services for Salesforce. If you need to extend access to additional user profiles, please refer the documentation for [Granting Profile Access] for eSign services for Salesforce.

Updating Email Addresses or Passwords

Administrator Salesforce Account Password Changes

If the Salesforce password or username has changed for the account linked to eSign services for your Salesforce Org, remember to update it so that status updates continue to work properly for agreements in your Org. Go to the Adobe Document Cloud eSign Services Admin page and click the **Account Setup** tab. Then click the **Update Salesforce User Name or Password to Enable Automatic Status Updates** link.



User Email Address Changes

If any user in the Org has an email change in Salesforce, make sure to also change the user's email address in eSign services. The only way to do that is for the admin or the user to log into adobe.echosign.com to update the password. You can reference this guide for instructions on how to update your email address.

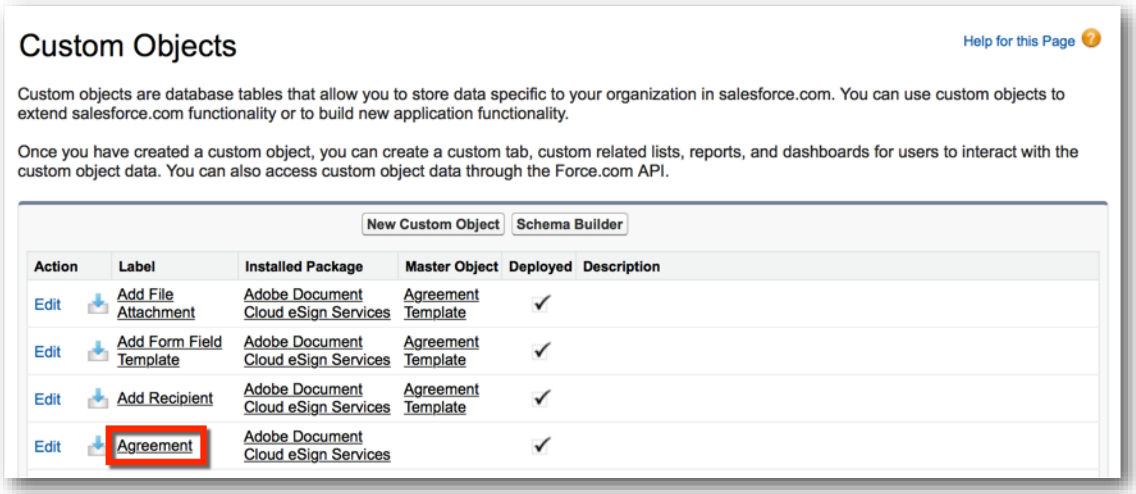
Adobe Document Cloud eSign Services for Salesforce Professional Edition - Additional Installation Steps

If you are using Salesforce Professional Edition, please make sure to follow the instructions in the following sections after completing the standard installation steps.

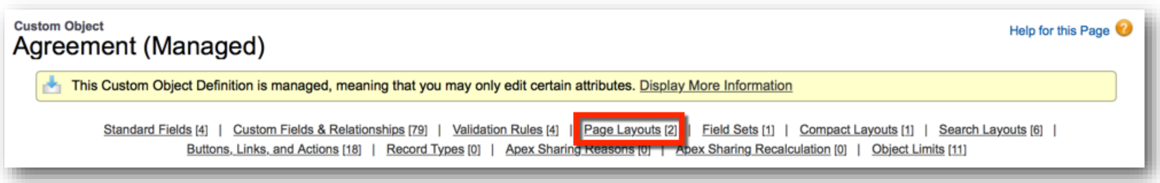
Note: Sending large document transactions (greater than 4.0 MB from the send agreement page and 9.0 MB when sending in batch) is not supported in the Professional edition. (See Configure Salesforce to Send Large Documents for Signature for more information.)

Adding Fields to the ‘Agreements Layout Professional’ Page Layout

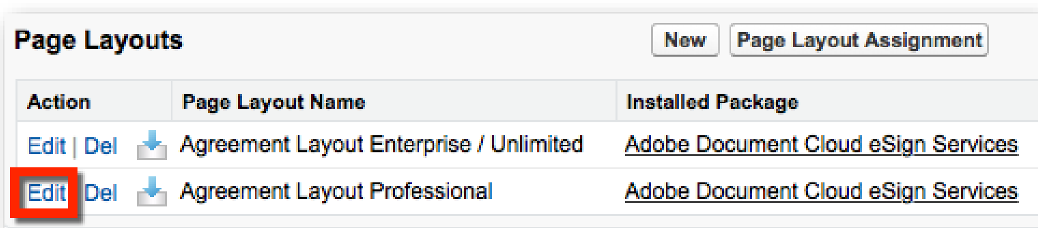
1. Click **Setup** then navigate to **Build | Create | Objects.**
2. Click the **Agreement** link.



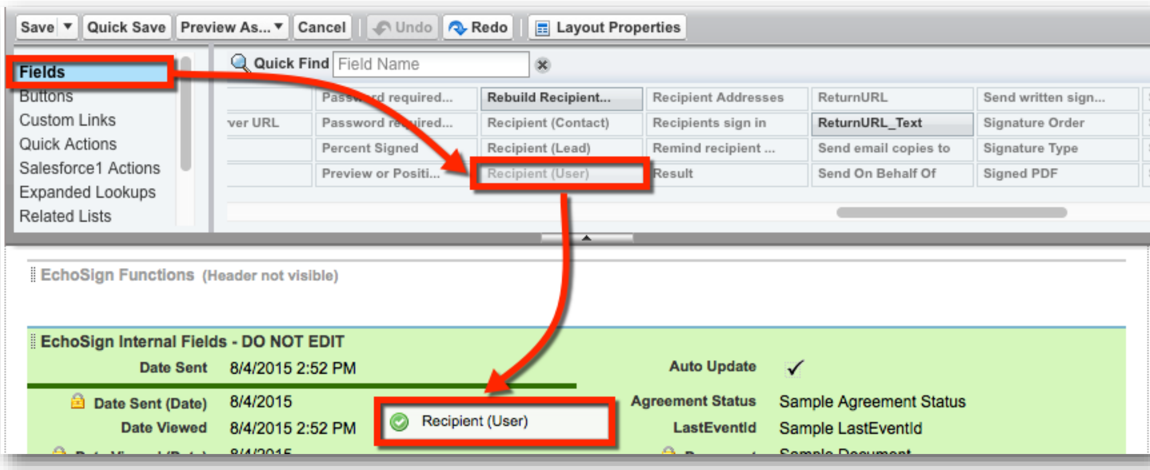
3. Click the **Page Layouts** link at the top of the page to navigate to that section.



4. In the Page Layouts section, click the **Edit** Action for the *Agreement Layout Professional* page layout.



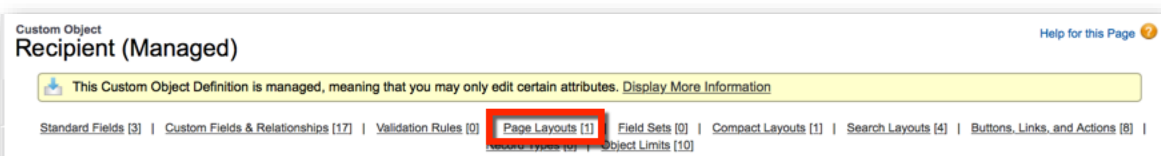
5. With **Fields** selected, click to drag and drop to the page layout each of the following fields:
   - Recipient (User)
   - Additional Recipient 1 (User)
   - Additional Recipient 2 (User)
   - Additional Recipient 3 (User)
   - Enable Automatic Reminders
   - Recipient Addresses
   - Merge



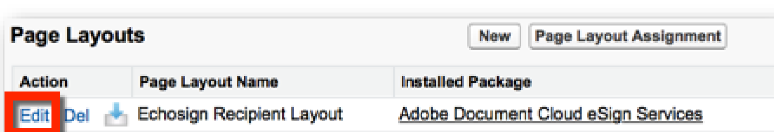
6. Click the **Save** button.

Adding Fields to the Recipient Page Layout

1. Click **Setup** then navigate to **Build | Create | Objects.**
2. Click the **Recipient** link.
3. Click the **Page Layouts** link at the top of the page to navigate to that section.



4. Click the **Edit** Action for the EchoSign Recipient Layout.



5. With **Fields** selected, click to drag and drop each of the following fields to the page layout:
   - Agreement
   - Contact
   - Email Address
   - Lead

- o Order Number
- o Person Account
- o Recipient Type
- o useEmailAddress
- o User
- o Merge

6. Click the **Save** button.

Select Agreements Page Style (Advanced or Basic)

eSign services for Salesforce has two page styles to create, edit, and view agreements. The default is the Advanced layout and is the recommended layout. Below is some information about the differences between the layouts as well as instructions for how to change to the Basic page layout.

The 'Agreement Advanced' Page Style (Default)

This page which is set as the default style allows you to create an eSign services Agreement on a single page – specify recipients, names the agreement, select options, attach files and send. This page also gives you more flexibility in specifying the number and type of recipients for each agreement.

The 'Agreement Basic' Page Style

This page uses the standard Salesforce.com page layout to view and edit the agreement. Sending a new agreement requires a few more clicks -- creating an agreement, saving it and then attaching files on a separate screen. This page allows you to customize the page layout (adding and removing your own custom fields and custom options) but does not provide the same flexibility in selecting the number and type of recipients as the Advanced Agreement page does.

To use the Agreement Basic page instead of the default Advanced page, follow the instructions in the next sections:

- Setting the 'Agreement Basic' page layout
- Setting up the Agreement buttons to work for your page layout

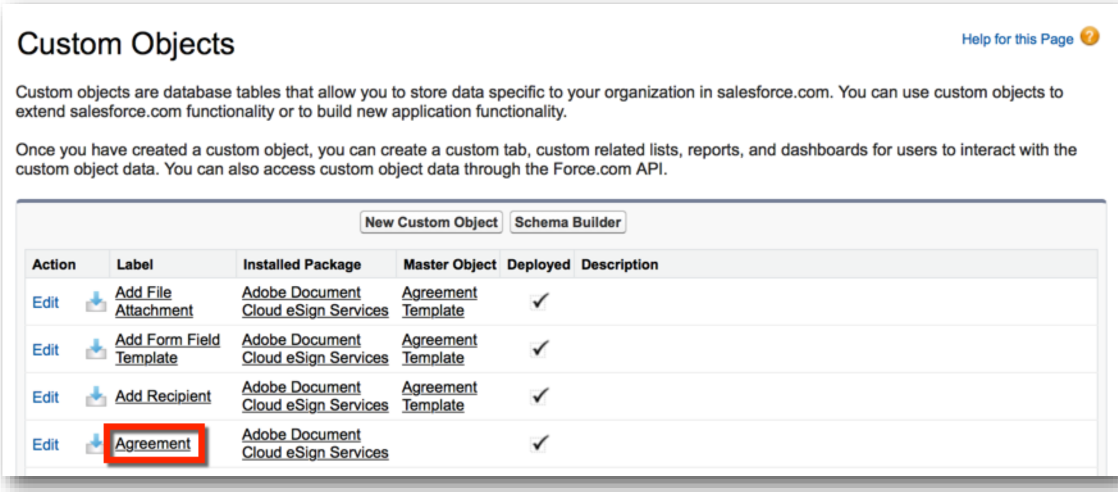
Setting the 'Agreement Basic' Page Style

If you choose to use the 'Agreement Basic' page, follow the instructions below to ensure that your Salesforce.com page layouts are properly configured

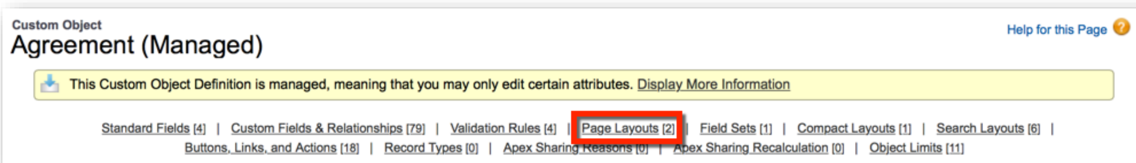
Note: This section only applies to customers with Salesforce.com Enterprise and Unlimited editions.

1. Click **Setup** then navigate to **Build | Create | Objects.**

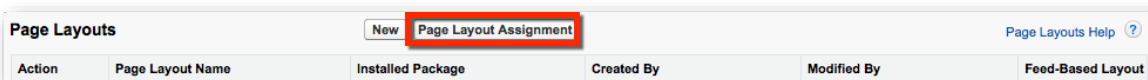
2. Click on the **Agreement** link.



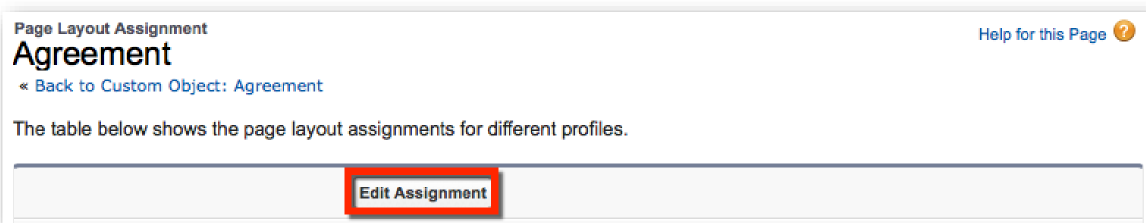
3. Click **Page Layouts** link at the top of the page to navigate to that section.



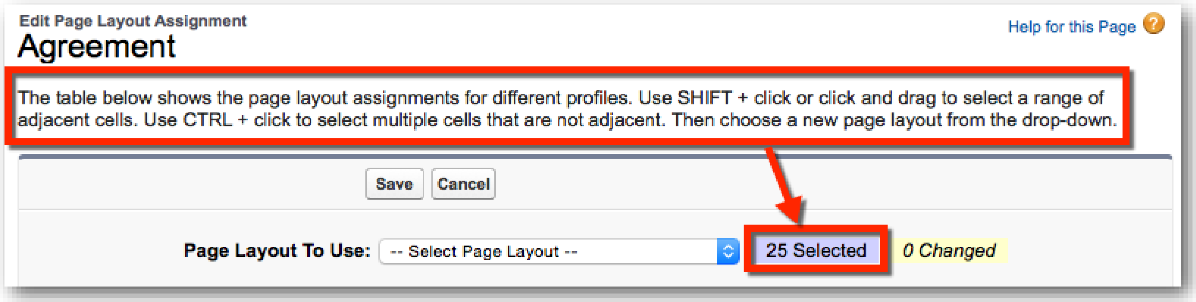
4. Click the **Page Layout Assignment** button.



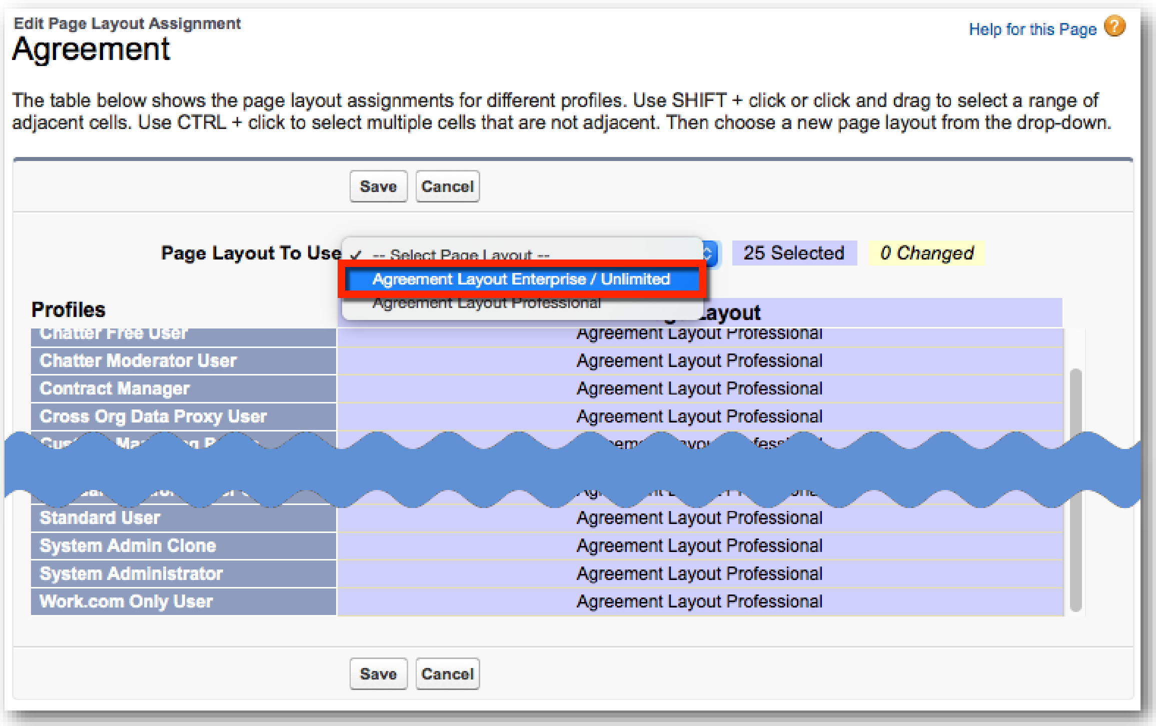
5. Click the **Edit Assignment** button.



6. Follow the instruction at the top of the page to select all the profiles.



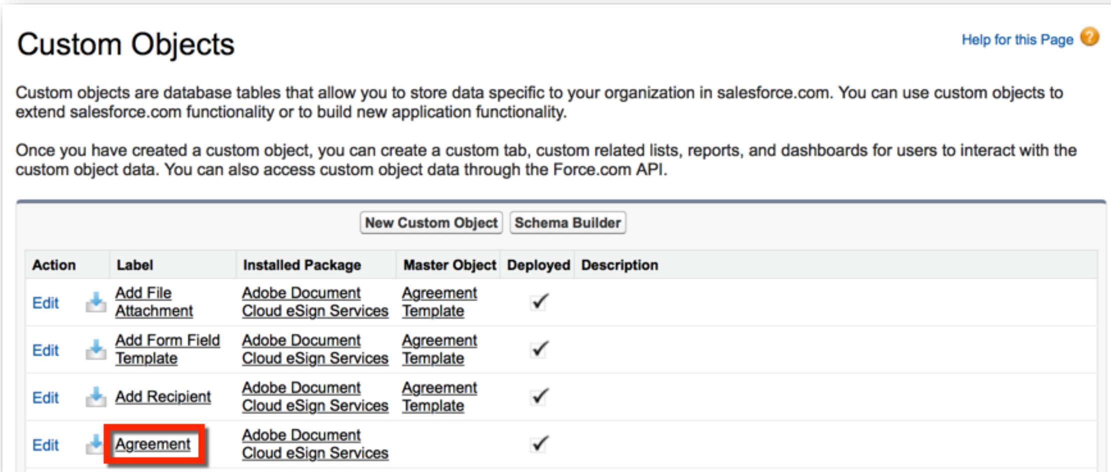
7. Select *Agreement Layout Enterprise / Unlimited* from the drop down list and click **Save**.



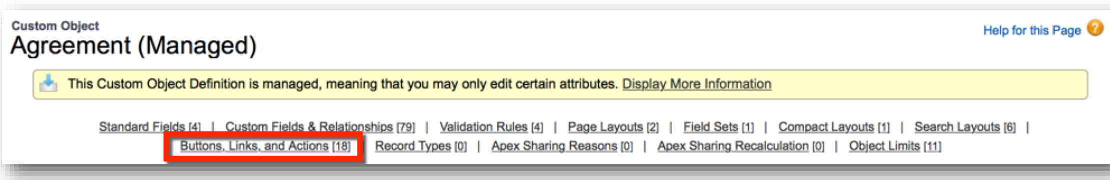
Setting Up the Agreements Buttons to Work for Your Page Style

For the layout to take in effect, you also need to update the buttons on the layout. Follow the instructions below to ensure your Salesforce.com pages are set up properly for the agreement related buttons.

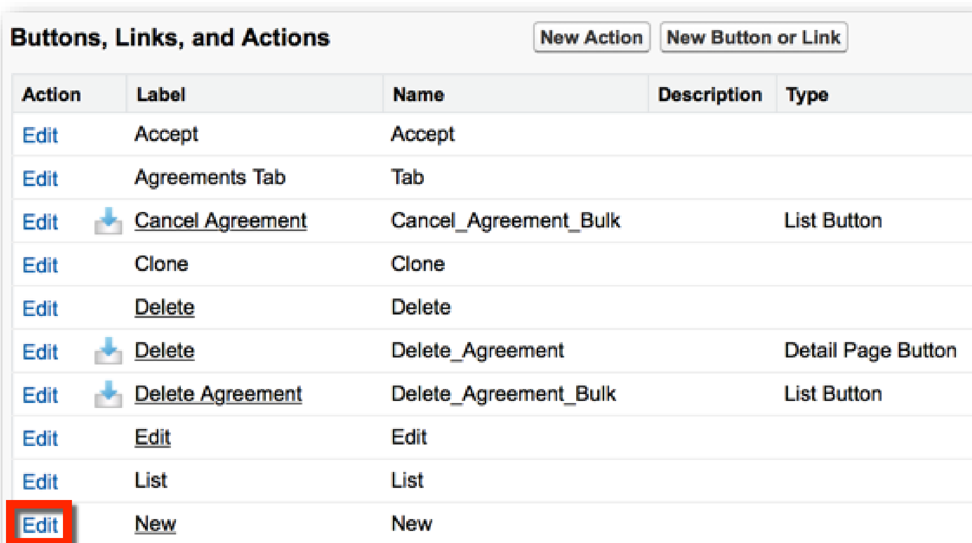
1. Click **Setup** then navigate to **Build | Create | Objects**.
2. Click the **Agreement** link.



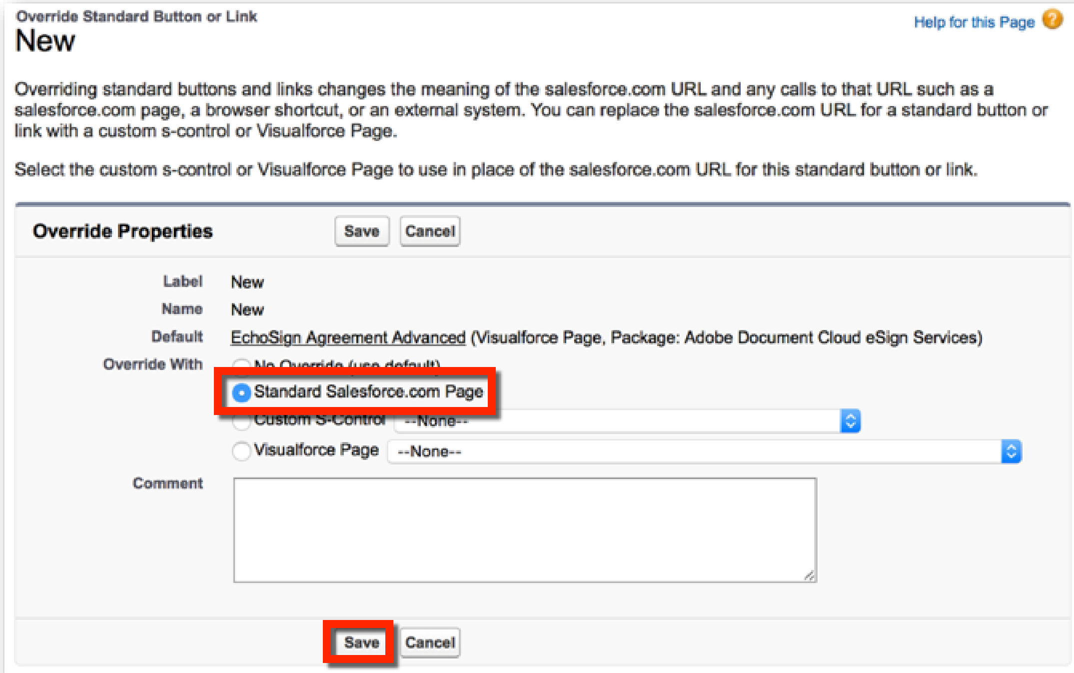
3. Click the **Buttons, Links, and Actions** link at the top of the page to navigate to that section.



4. Enable the *New* button for the 'Agreement Basic' Page Style as follows:
   a) Click the **Edit** Action next to *New*.



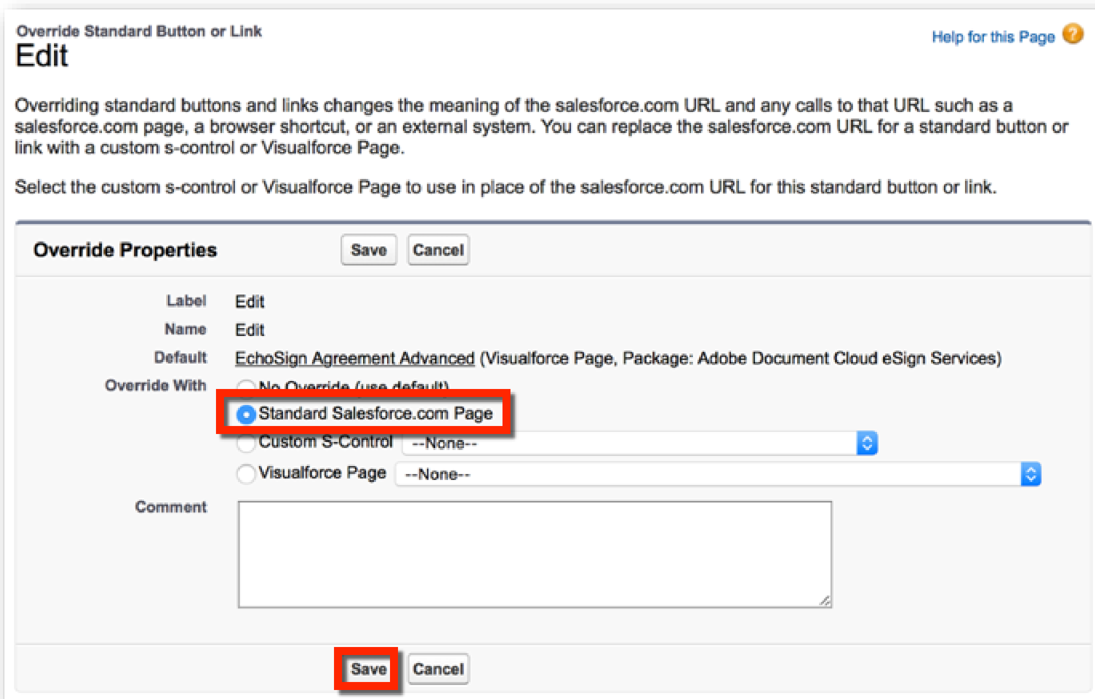
b) Enable the *Standard Salesforce.com Page* option then click the **Save** button.



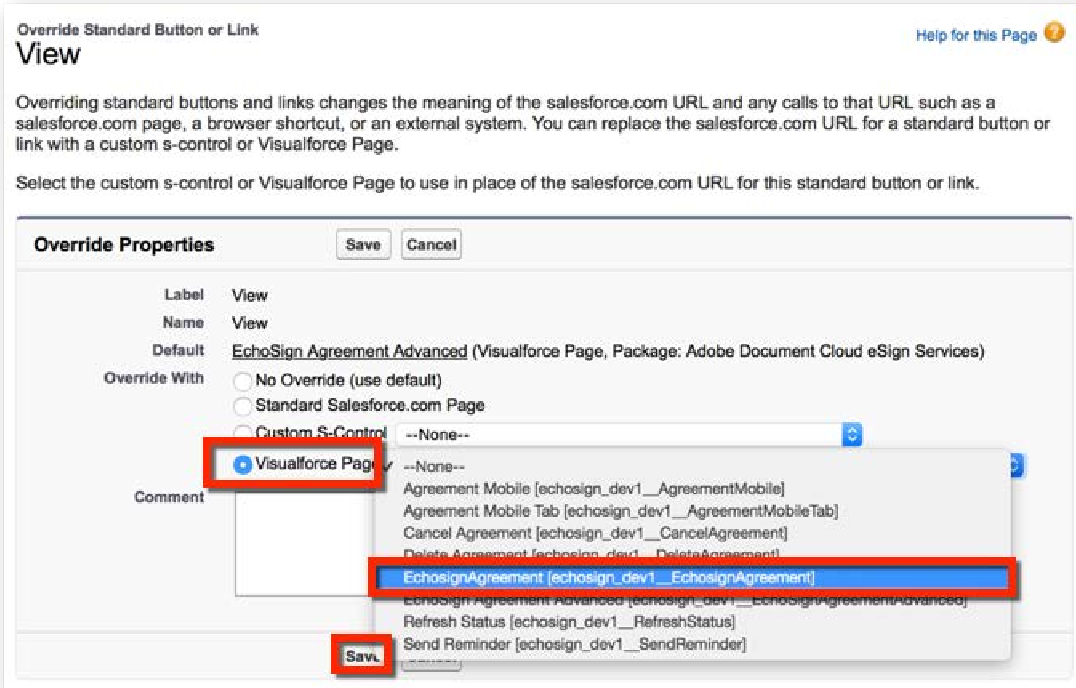
5. Enable the *Edit* button for the 'Agreement Basic' Page Style as follows:

a) Click the **Edit** Action next to *Edit*.

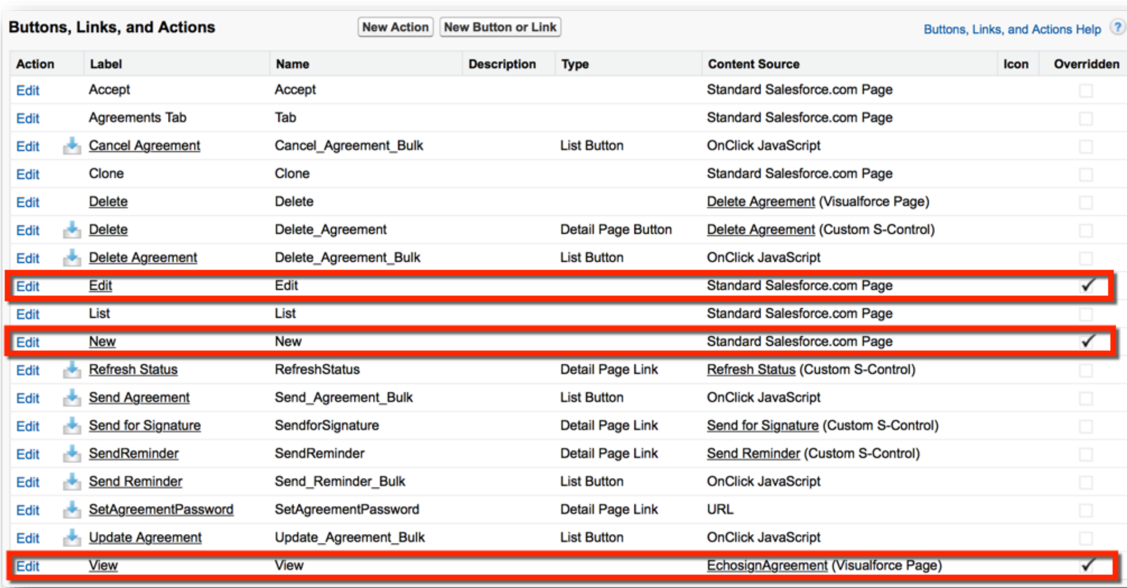
b) Enable the *Standard Salesforce.com Page* option then click **Save**.



6. Enable the *View* button for the 'Agreement Basic' Page Style as follows:
   a) Click the **Edit** Action next to *View*.
   b) Enable *Visualforce Page*, select *EchoSignAgreement* from the drop-down list, then click **Save**.



- At the end of the process, you should have the following setup:



Buttons, Links, and Actions — New Action | New Button or Link — Buttons, Links, and Actions Help

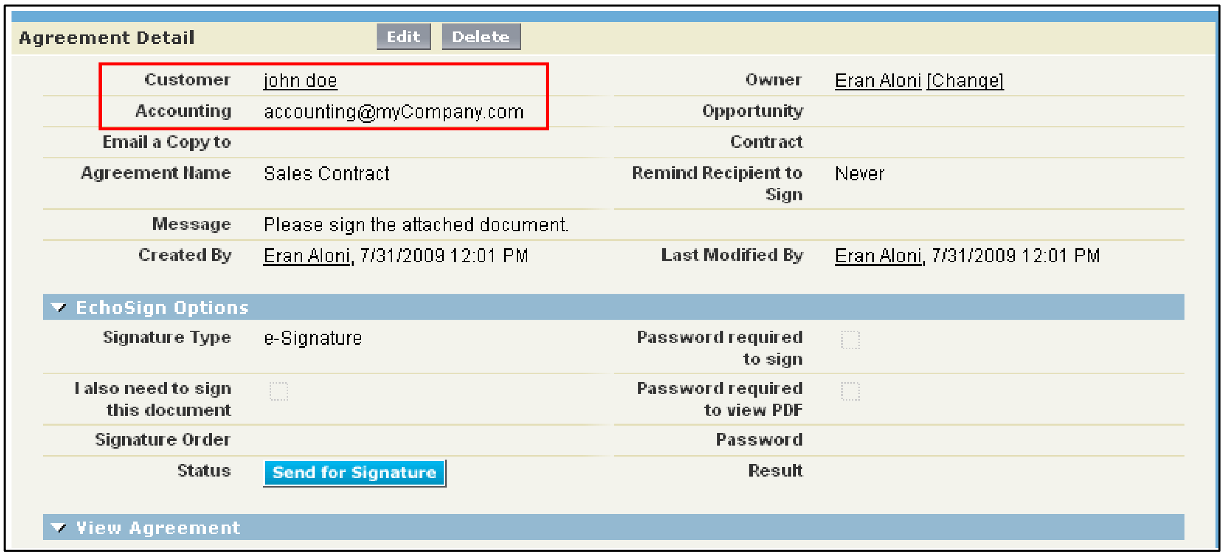
Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accept	Accept			Standard Salesforce.com Page		
Edit	Agreements Tab	Tab			Standard Salesforce.com Page		
Edit	Cancel Agreement	Cancel_Agreement_Bulk		List Button	OnClick JavaScript		
Edit	Clone	Clone			Standard Salesforce.com Page		
Edit	Delete	Delete			Delete Agreement (Visualforce Page)		
Edit	Delete	Delete_Agreement		Detail Page Button	Delete Agreement (Custom S-Control)		
Edit	Delete Agreement	Delete_Agreement_Bulk		List Button	OnClick JavaScript		
Edit	Edit	Edit			Standard Salesforce.com Page		✓
Edit	List	List			Standard Salesforce.com Page		
Edit	New	New			Standard Salesforce.com Page		✓
Edit	Refresh Status	RefreshStatus		Detail Page Link	Refresh Status (Custom S-Control)		
Edit	Send Agreement	Send_Agreement_Bulk		List Button	OnClick JavaScript		
Edit	Send for Signature	SendforSignature		Detail Page Link	Send for Signature (Custom S-Control)		
Edit	SendReminder	SendReminder		Detail Page Link	Send Reminder (Custom S-Control)		
Edit	Send Reminder	Send_Reminder_Bulk		List Button	OnClick JavaScript		
Edit	SetAgreementPassword	SetAgreementPassword		Detail Page Link	URL		
Edit	Update Agreement	Update_Agreement_Bulk		List Button	OnClick JavaScript		
Edit	View	View			EchosignAgreement (Visualforce Page)		✓

Customizing the 'Agreement Basic' Page Layout

This section addresses customizing the 'Agreement Basic' page. These customizations are not available when using the default 'Agreement Advanced' page. See Select Agreements Page Style (Advanced or Basic) for more.

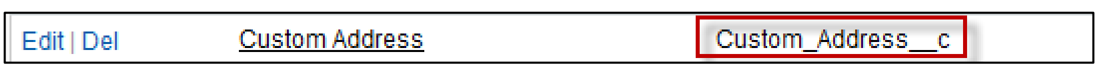
Custom Address Fields

Add fields like 'Customer', 'Sales Operations', 'Accounting', etc. to the Document Cloud Agreement Object and use them to specify signers instead of the standard 'Recipient' and 'Additional Recipients' fields.



Once you add the required custom fields to your Agreement page layout, update the 'Override Recipient Field List' Setting with the list of those fields' API names.

To get a field's API name, click **Setup** then navigate to **Build | Create | Objects** and click on the 'Agreement' object. Then find the field you'd like to use in the 'Custom Fields and Relationship' list. The Field's API name can be found in the 'API Name' column on the list.

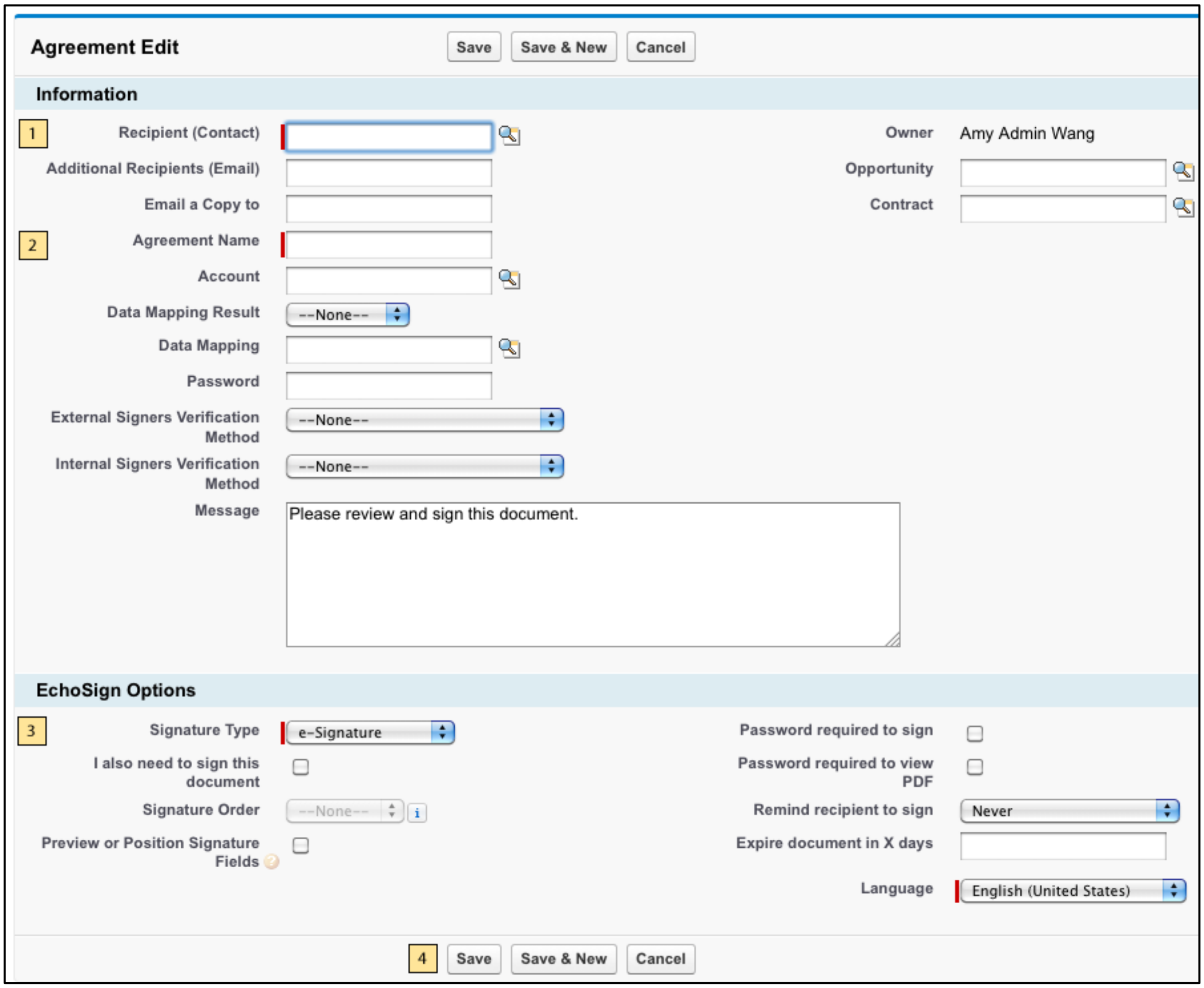


See eSign Services for Salesforce Custom Settings for instructions on how to update the 'Override Recipient Field List' settings.

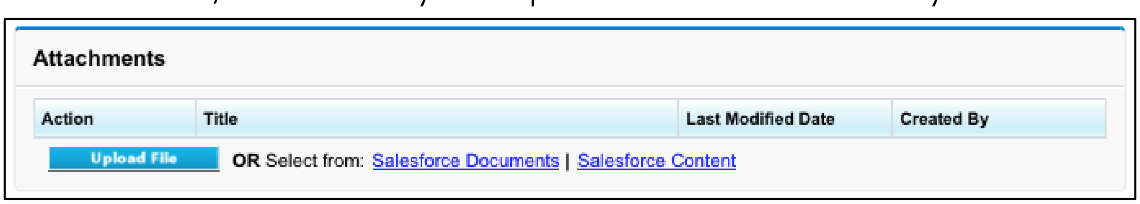
Send using the 'Agreement Basic' page

Create a new agreement by clicking 'New' on the Agreements tab or on the Agreements related list in one of the relevant related objects (Contact, Opportunity, Lead, etc.)

1. Specify the recipients.
2. Name the agreement, type a message.
3. Select signature type, language and other relevant sending options.
4. Click the **Save** button.



5. On the next screen, attach files from your computer or from the Salesforce Library or Salesforce Content.



6. Click the **Send for Signature** button

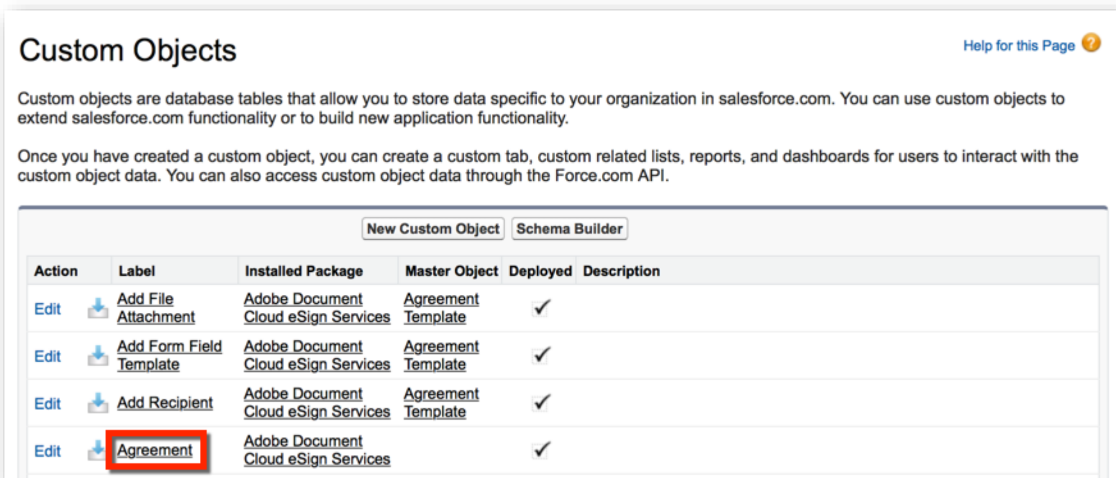
Switching Back to the 'Agreement Advanced' Page Layout

Setting the 'Agreement Advanced' page Style

If you choose to switch to the default 'Agreement Advanced' page, follow the instructions below to ensure that your Salesforce.com page layouts are properly configured

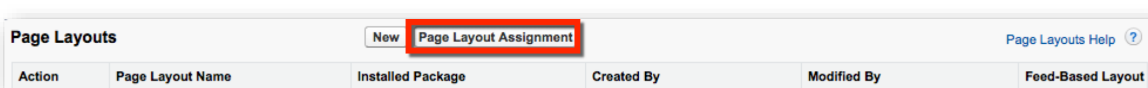
Note: This section only applies to customers with Salesforce.com Enterprise and Unlimited editions.

1. Click **Setup** then navigate to **Build | Create | Objects**.
2. Click the **Agreement** link.

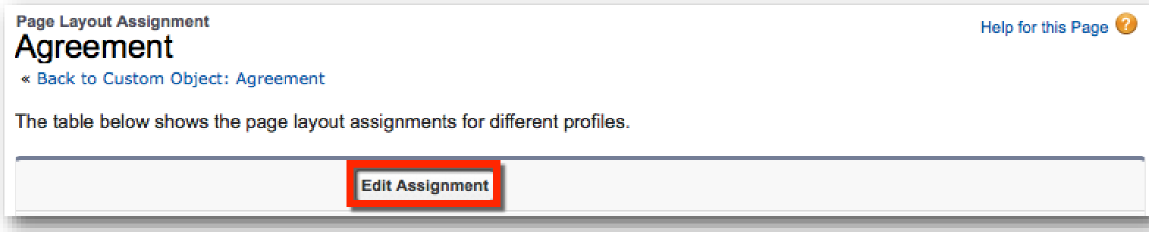


3. Click the **Page Layouts** link at the top of the page to navigate to that section.

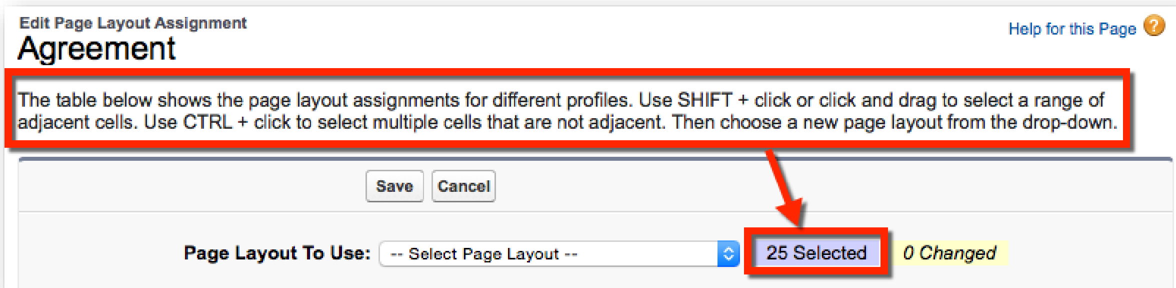
4. Click the **Page Layout Assignment** button.



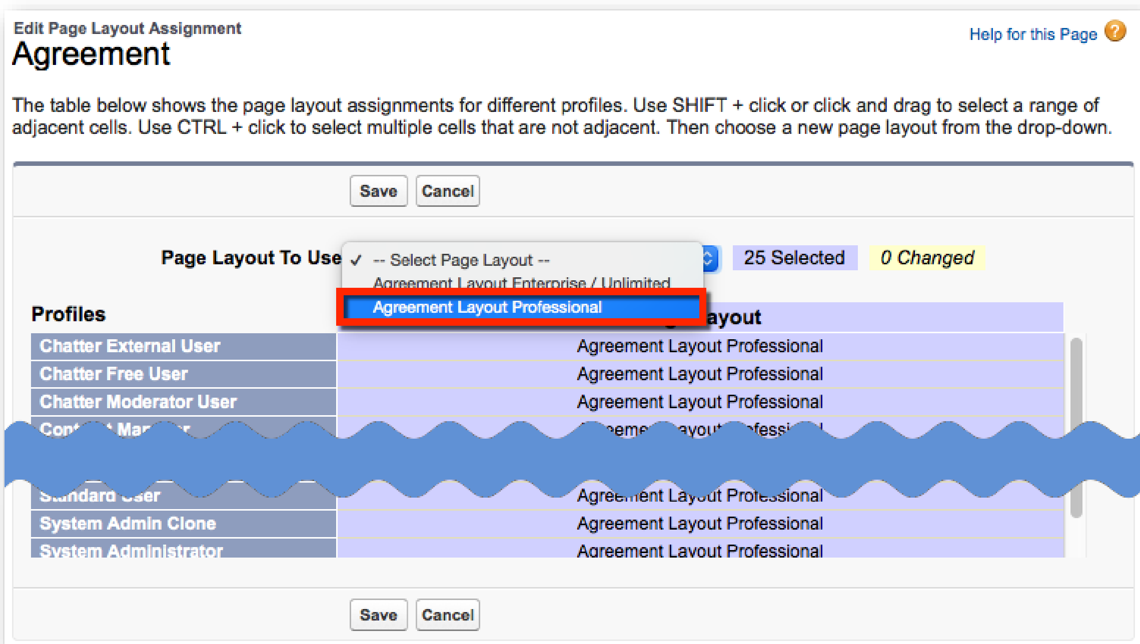
5. Click the **Edit Assignment** button.



6. Follow the instruction at the top of the page to select all the profiles.



7. Select *Agreement Layout Professional* from the drop down list and click **Save**.

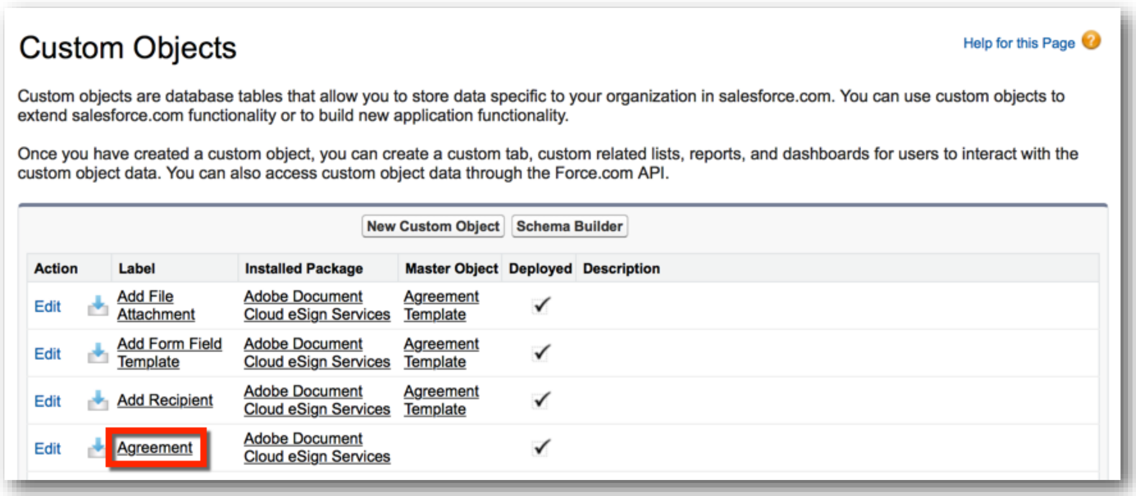


Setting Up the Agreement Buttons for the 'Agreement Advanced' Page style

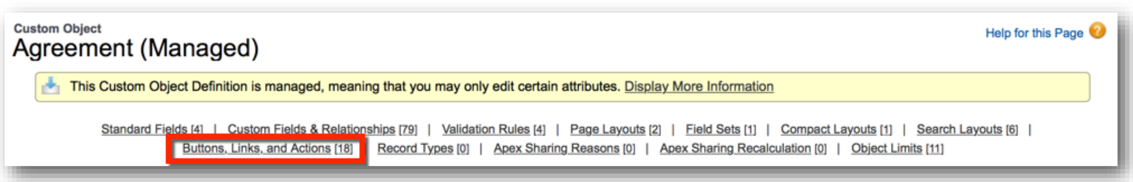
If you are switching back to the Advanced page layout, you must update the Agreement buttons on the layout to complete the switch.

Follow the instructions below to ensure your Salesforce.com pages are set up properly for the agreement related buttons:

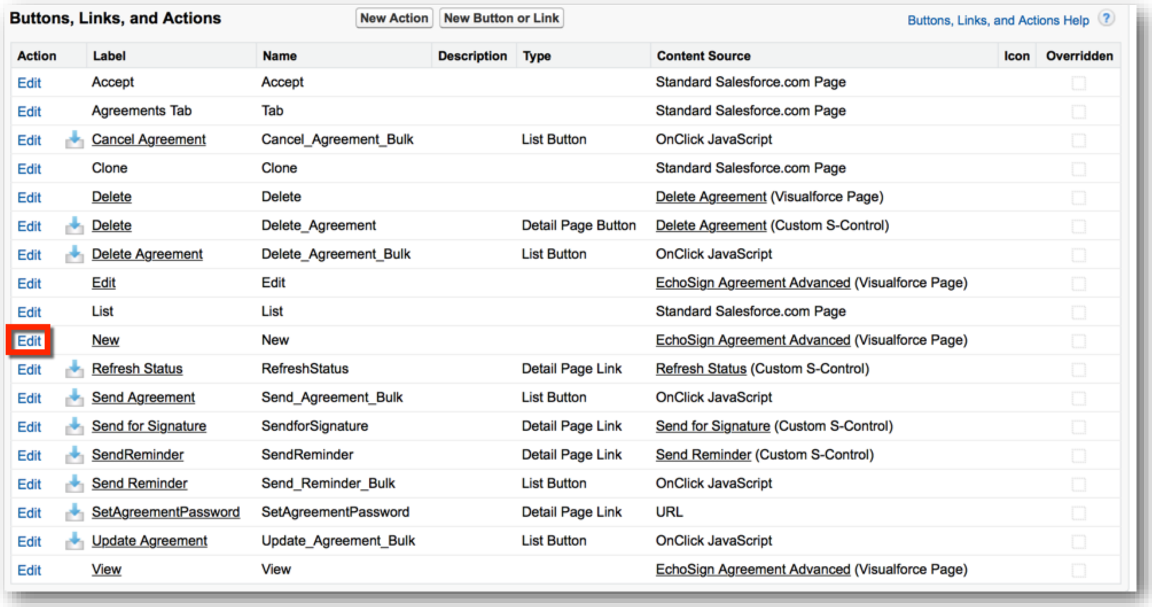
1. Click **Setup** then navigate to **Build | Create | Objects.**
2. Click on the **Agreement** link.



3. Click the **Buttons, Links, and Actions** link at the top of the page to navigate to that section.



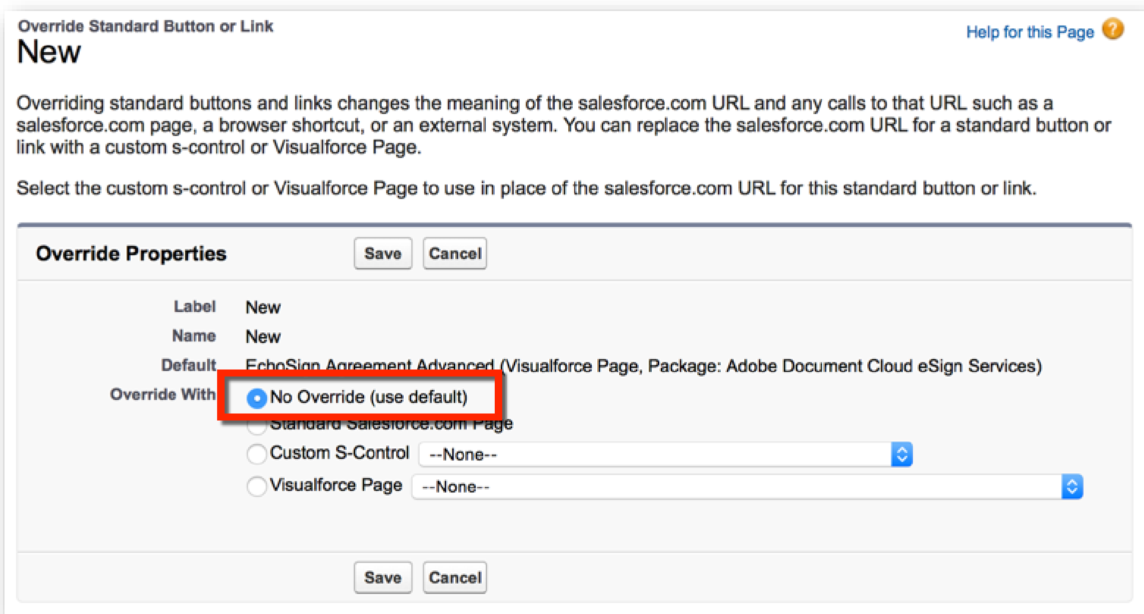
4. Click the **Edit** Action next to *New*.



Buttons, Links, and Actions — New Action — New Button or Link — Buttons, Links, and Actions Help

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accept	Accept			Standard Salesforce.com Page		
Edit	Agreements Tab	Tab			Standard Salesforce.com Page		
Edit	Cancel Agreement	Cancel_Agreement_Bulk		List Button	OnClick JavaScript		
Edit	Clone	Clone			Standard Salesforce.com Page		
Edit	Delete	Delete			Delete Agreement (Visualforce Page)		
Edit	Delete	Delete_Agreement		Detail Page Button	Delete Agreement (Custom S-Control)		
Edit	Delete Agreement	Delete_Agreement_Bulk		List Button	OnClick JavaScript		
Edit	Edit	Edit			EchoSign Agreement Advanced (Visualforce Page)		
Edit	List	List			Standard Salesforce.com Page		
Edit	New	New			EchoSign Agreement Advanced (Visualforce Page)		
Edit	Refresh Status	RefreshStatus		Detail Page Link	Refresh Status (Custom S-Control)		
Edit	Send Agreement	Send_Agreement_Bulk		List Button	OnClick JavaScript		
Edit	Send for Signature	SendforSignature		Detail Page Link	Send for Signature (Custom S-Control)		
Edit	SendReminder	SendReminder		Detail Page Link	Send Reminder (Custom S-Control)		
Edit	Send Reminder	Send_Reminder_Bulk		List Button	OnClick JavaScript		
Edit	SetAgreementPassword	SetAgreementPassword		Detail Page Link	URL		
Edit	Update Agreement	Update_Agreement_Bulk		List Button	OnClick JavaScript		
Edit	View	View			EchoSign Agreement Advanced (Visualforce Page)		

5. Enable *No Override (use default)* then click **Save**.



6. Click the **Edit** Action next to *Edit.*
7. Enable *No Override (use default)* then click **Save**
8. Click the **Edit** action next to *View*.
9. Enable '*No Override (use default)* then click **Save.**

At the end of the process, you should have the following setup:

Standard Buttons and Links

Action	Label	Name	Overridden	Display
Edit	Agreements Tab	Tab		Standard Salesforce.com Page
Edit	List	List		Standard Salesforce.com Page
Edit	View	View		EchoSign Agreement Advanced (Visualforce Page)
Edit	Edit	Edit		EchoSign Agreement Advanced (Visualforce Page)
Edit	Delete	Delete		Delete Agreement (Visualforce Page)
Edit	Clone	Clone		Standard Salesforce.com Page
Edit	New	New		EchoSign Agreement Advanced (Visualforce Page)
Edit	Accept	Accept		Standard Salesforce.com Page