
Adobe Document Cloud eSign Services

NetSuite Integration v4 Installation and Customization Guide

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Overview

Adobe Document Cloud eSign services (formerly EchoSign) for NetSuite provides a complete eSignature integration with NetSuite. Using this integration, you can send agreements—such as contracts, quotes, and other documents requiring electronic signatures—to recipients directly from NetSuite. You can create and send Adobe eSign services agreements from customer, lead, quote, and other NetSuite records. Adobe eSign services updates NetSuite with the current status of agreements and stores the agreements with the associated NetSuite records once they are fully executed. You can view the history of all agreements sent from NetSuite from within the product.

Version 4 release notes

Please refer to the Adobe Document Cloud eSign services for NetSuite v4 release notes for more information.

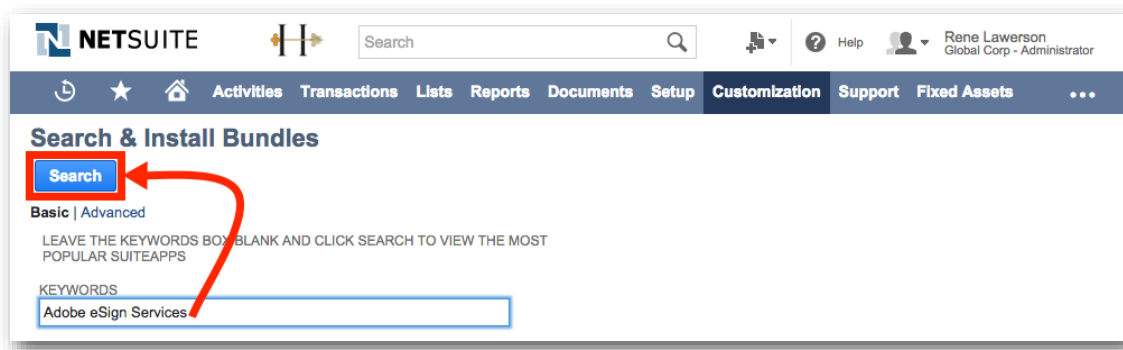
Installing the bundle and configuring OAuth

Only a NetSuite administrator can install or update the bundle. In order to configure OAuth, this NetSuite administrator should also have Admin access in eSign services. Before installing the bundle in your Production account, we recommend installing and testing the bundle in a NetSuite Sandbox account. See [Creating an Adobe eSign services agreement](#) for more information about testing.

Note: Customers upgrading from v3.5.9 to v4.0 should NOT remove their existing API key. See [Setting custom preferences \(existing users\)](#) for more information on how the API key is used.

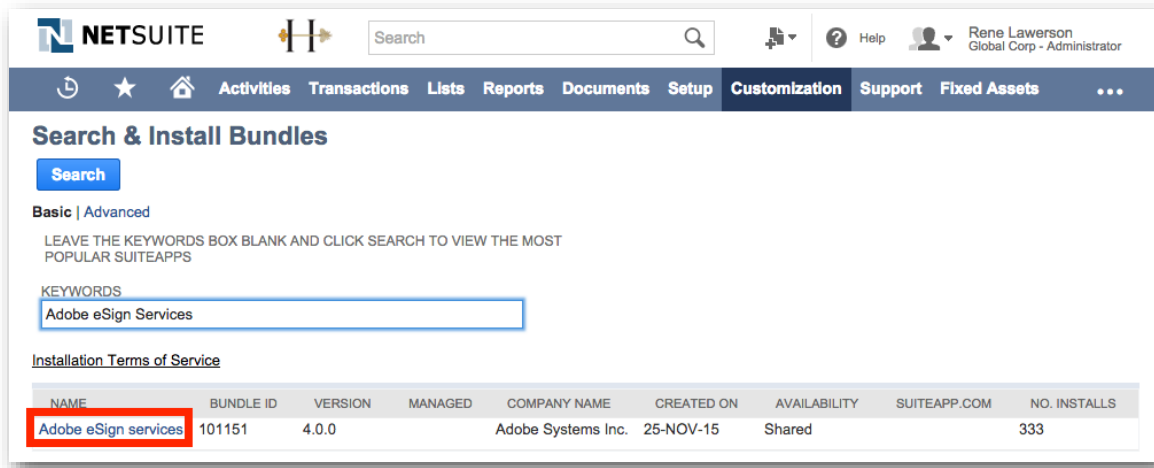
Installing the bundle for the first time

1. Navigate to **Customization > SuiteBundler > Search & Install Bundles**.
2. On the Search & Install Bundles page, enter "Adobe eSign services" as keywords then click **Search**.

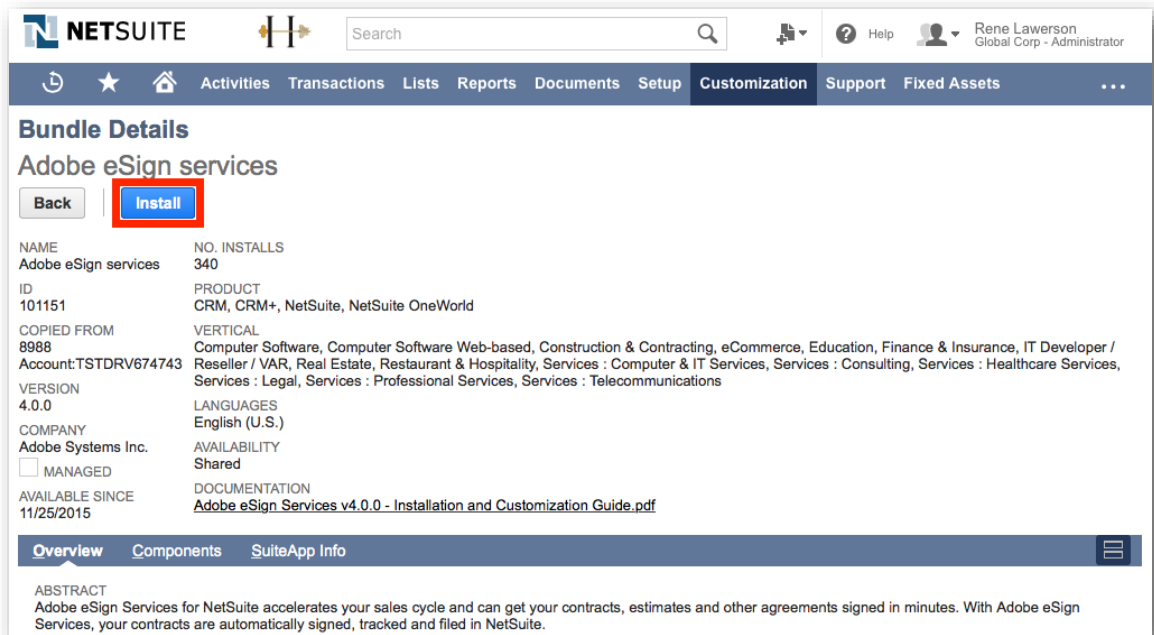


Adobe Document Cloud eSign Services

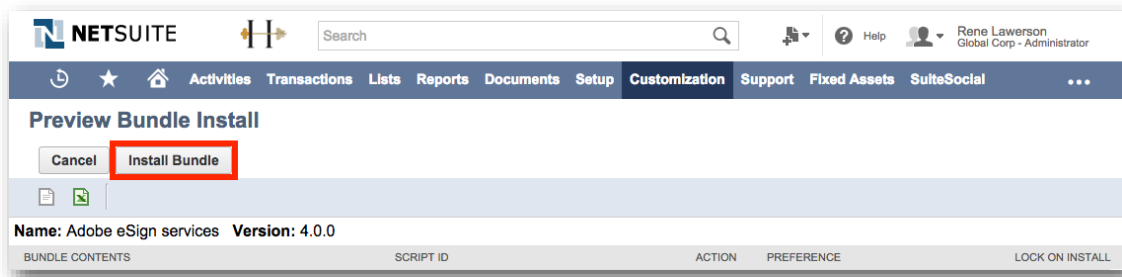
- Click the Adobe eSign services bundle name.



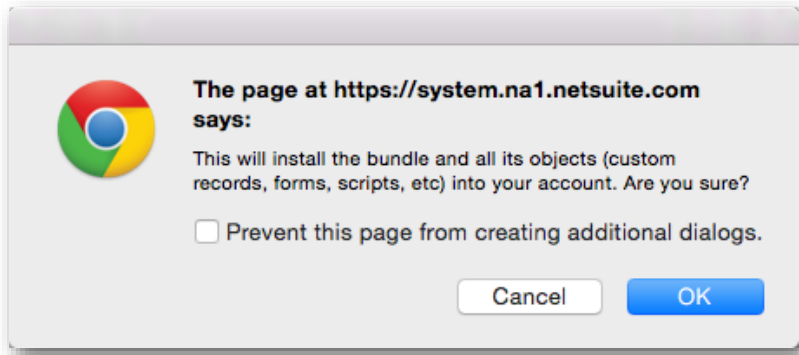
- On the *Bundle Details* page, click **Install**.



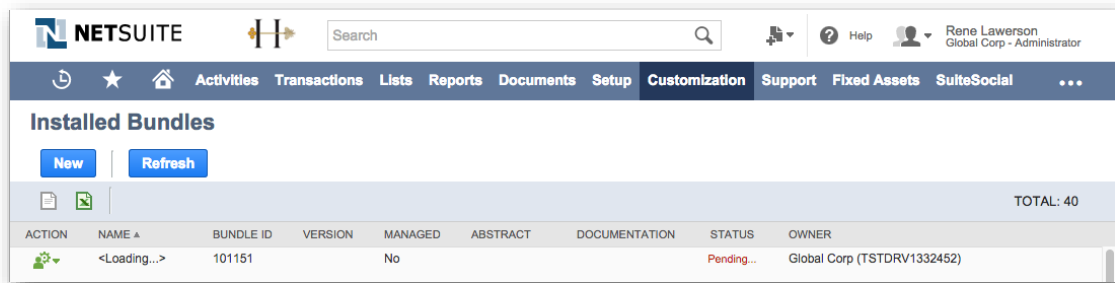
- In the *Preview Bundle Install* page, click **Install Bundle**. There is no need to change any of the default values on the page.



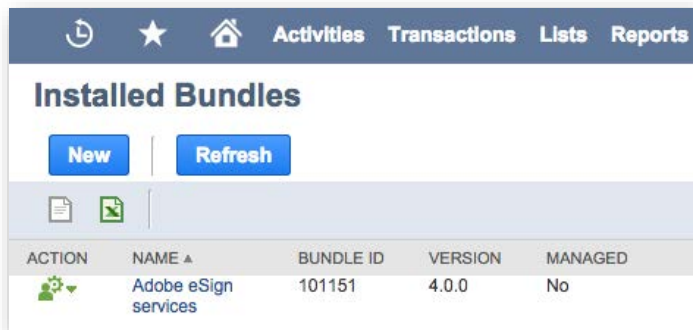
- When the install dialog displays, click **OK** to proceed.



- During the installation process, the status of the bundle displays as *Pending*. To display an updated status, click **Refresh**.



After the bundle installation completes, *Adobe eSign services* displays on the *Installed Bundles* page.



- If you are already an Adobe Document Cloud eSign services customer, proceed to [Configuring OAuth after installing or upgrading](#). If you do not have an eSign services account, you can sign up for a FREE 30-day trial by clicking the link below:

https://netsuiteintegration.echosign.com/public/upgrade?type=enterprise_trial&cs=ns_bundle

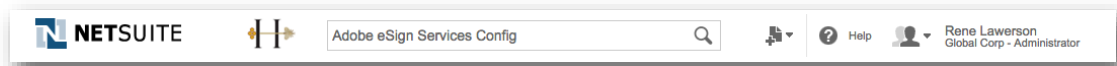
Follow the online registration steps to enable your Adobe eSign services account.

Configuring OAuth after installing or upgrading

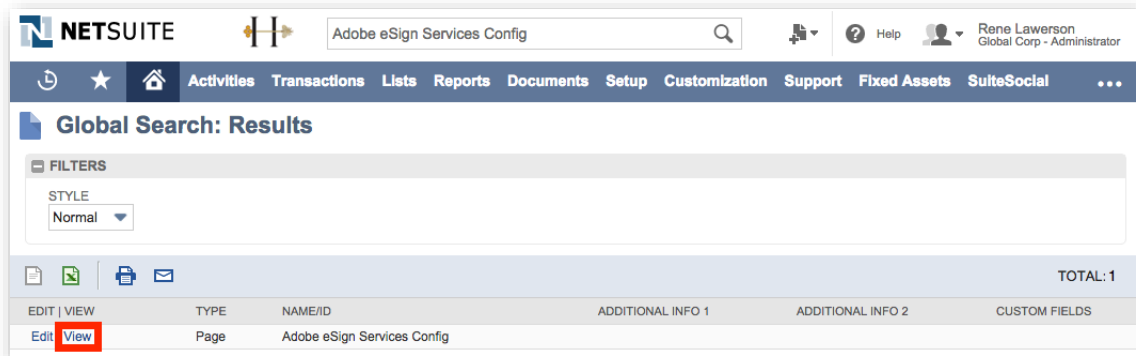
To improve data security, eSign services now uses OAuth 2.0 to authenticate your eSign services account within NetSuite. This new protocol allows NetSuite to communicate with eSign services without requesting your eSign services password. Since sensitive information is not being shared directly between the apps, your account is less likely to be compromised. This improvement will not impact your implementation, but you must do a one-time configuration after installing or upgrading to the v4 bundle in your Production or Sandbox account. This configuration authorizes your installed NetSuite bundle to communicate with Adobe Document Cloud eSign services.

As mentioned above, the NetSuite Administrator who configures OAuth must also have Admin account access in eSign services.

1. In NetSuite, do one of the following to navigate to the *Adobe eSign Services Config* list page:
 - Use the *NetSuite Global Search* field in the header to search for the "Adobe eSign Services Config" custom record type.

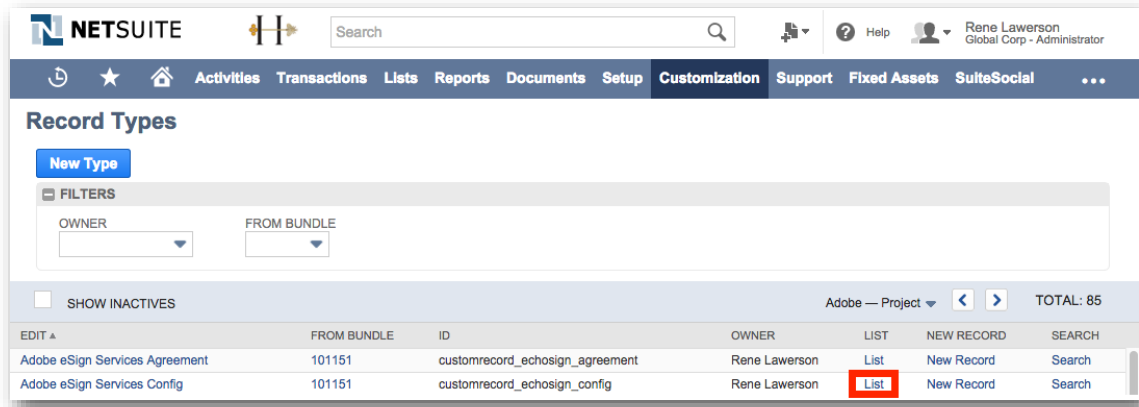


In the *Search Results* page, click **View** for the *Adobe eSign Services Config* record type row.

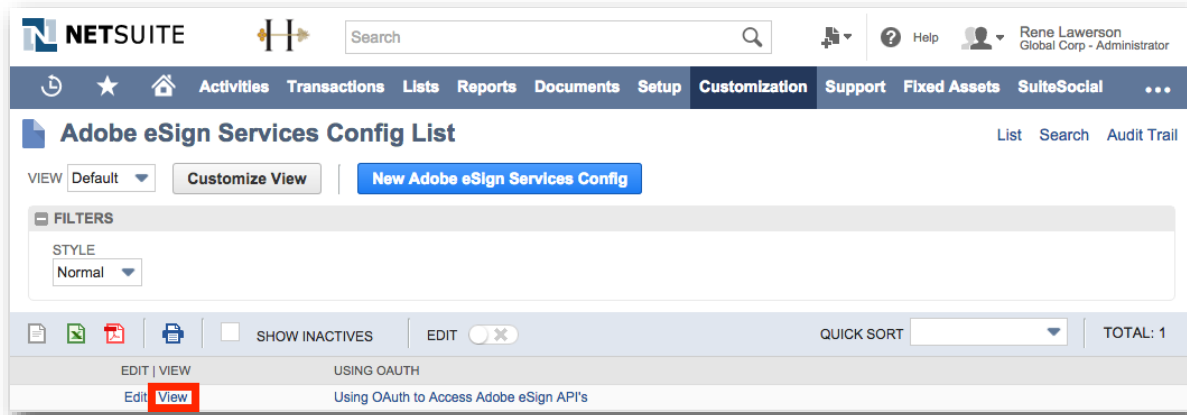


Adobe Document Cloud eSign Services

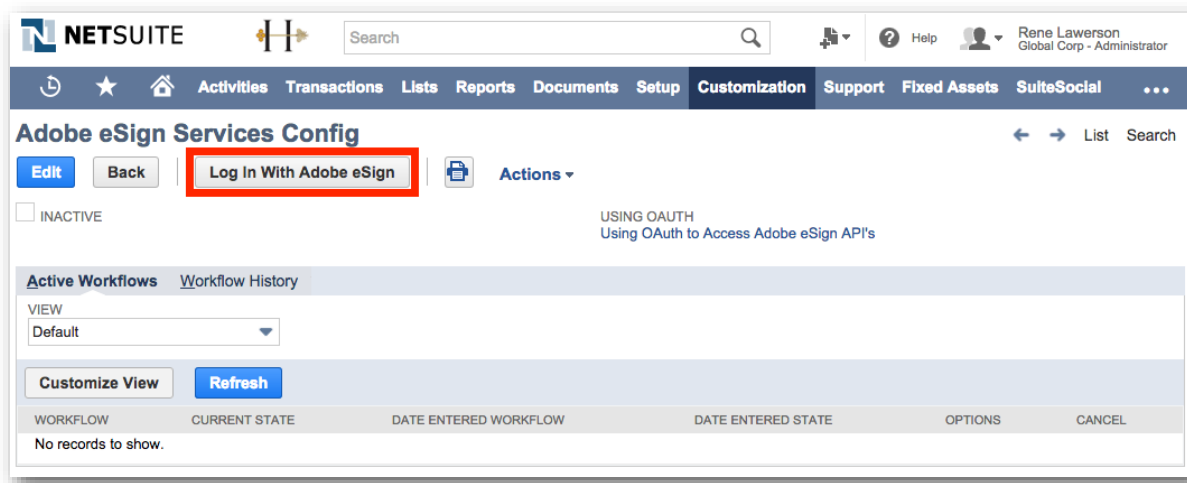
- Navigate to **Customization > Lists, Records, & Files > Records Types**. Locate the *Adobe eSign Services Config* record type, then click **List**.



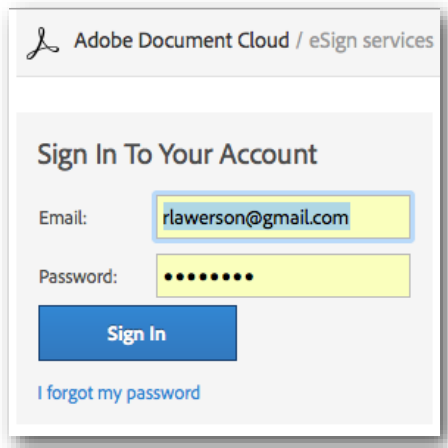
2. On the *Adobe eSign Services Config List* page, click **View** to the left of *Using OAuth to Access Adobe eSign APIs*.



3. In the *Adobe eSign Services Config* page, click **Login In With Adobe eSign**.

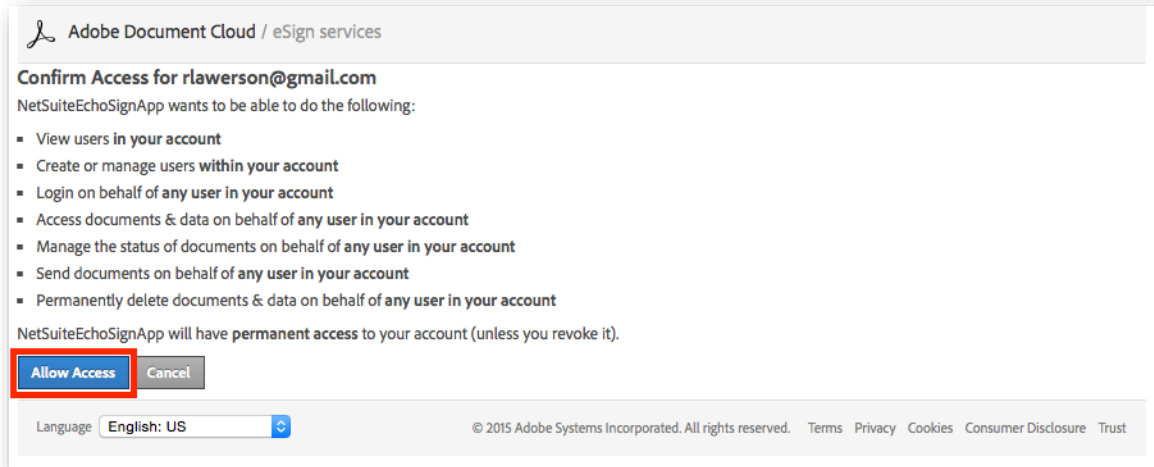


4. When the Adobe Document Cloud / eSign services login page displays, enter your credentials.



The screenshot shows the login page for Adobe Document Cloud / eSign services. At the top, there is a logo and the text "Adobe Document Cloud / eSign services". Below this, the heading "Sign In To Your Account" is displayed. There are two input fields: "Email:" with the value "rlawerson@gmail.com" and "Password:" with a masked password represented by dots. A blue "Sign In" button is located below the password field. At the bottom, there is a link that says "I forgot my password".

5. After signing in to your account, the *Confirm Access* page (for OAuth) displays. Click **Allow Access**.



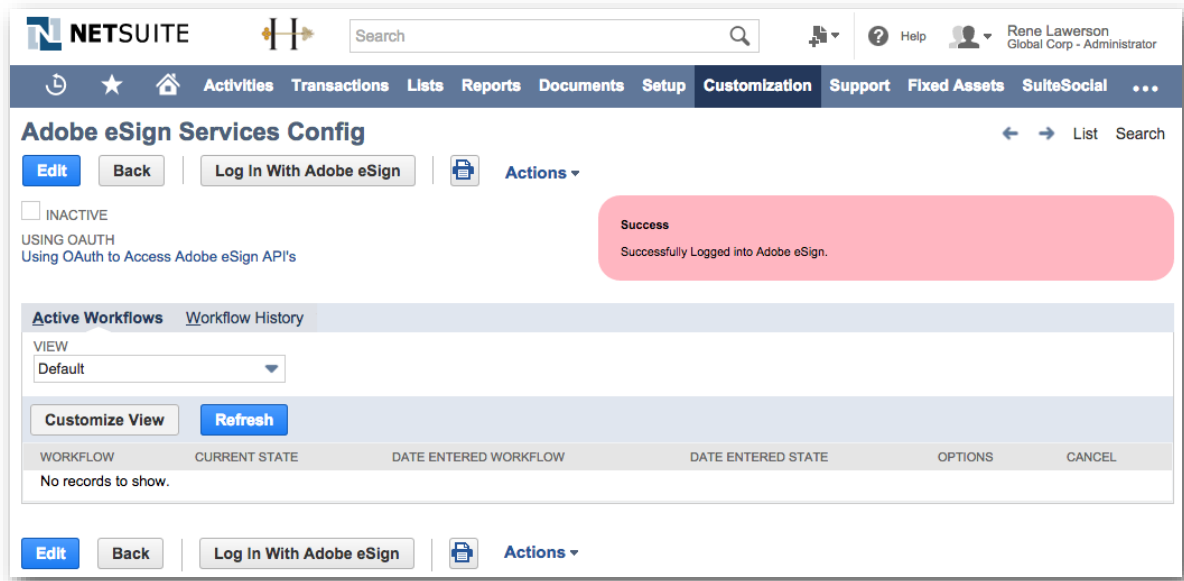
The screenshot shows the "Confirm Access" page for the user "rlawerson@gmail.com". The page title is "Confirm Access for rlawerson@gmail.com". Below the title, it states "NetSuiteEchoSignApp wants to be able to do the following:" and lists several permissions:

- View users in your account
- Create or manage users within your account
- Login on behalf of any user in your account
- Access documents & data on behalf of any user in your account
- Manage the status of documents on behalf of any user in your account
- Send documents on behalf of any user in your account
- Permanently delete documents & data on behalf of any user in your account

Below the list, it states "NetSuiteEchoSignApp will have permanent access to your account (unless you revoke it)." At the bottom, there are two buttons: "Allow Access" (highlighted with a red box) and "Cancel".

At the very bottom of the page, there is a footer with the text "Language English: US" and a dropdown arrow, followed by "© 2015 Adobe Systems Incorporated. All rights reserved. Terms Privacy Cookies Consumer Disclosure Trust".

- When the authorization is complete, you are redirected back to *Adobe eSign Services Config* page in NetSuite as shown below.



Note: If you are configuring OAuth in your Sandbox account, you will encounter the error "Could not determine customer compid" when the authorization completes. To proceed you must change the account domain portion of the URL (system.netsuite.com) in your browser to point back to the NetSuite Sandbox as follows:

Change:

system.netsuite.com/app/site/hosting/scriptlet.nl?script=745&deploy=1&web_access_point=https://echosign.com

To:

system.sandbox.netsuite.com/app/site/hosting/scriptlet.nl?script=745&deploy=1&web_access_point=https://echosign.com

Updating the bundle (existing users)

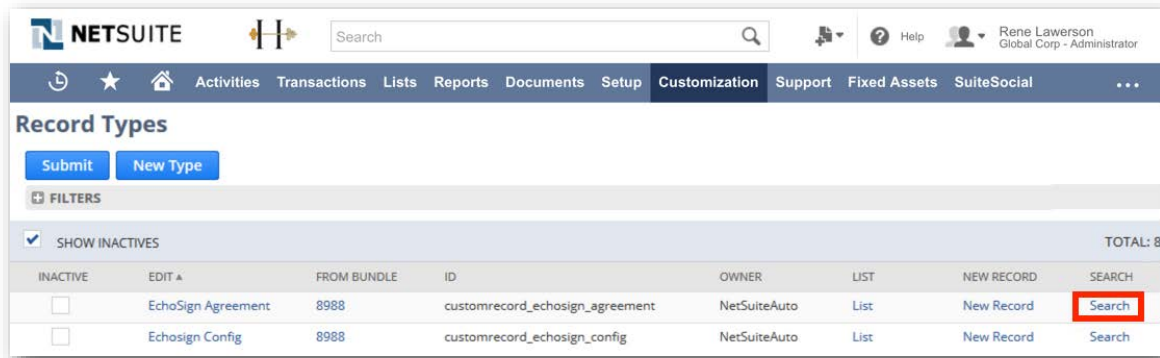
Periodically, updates to the NetSuite bundle are released by Adobe Systems, Inc. Existing users of the eSign services for NetSuite integration can easily update to the latest bundle.

Note: Customers upgrading from v3.5.9 to v4.0 should NOT remove their existing API key. See [Setting custom preferences \(existing users\)](#) for more information on how the API key is used.

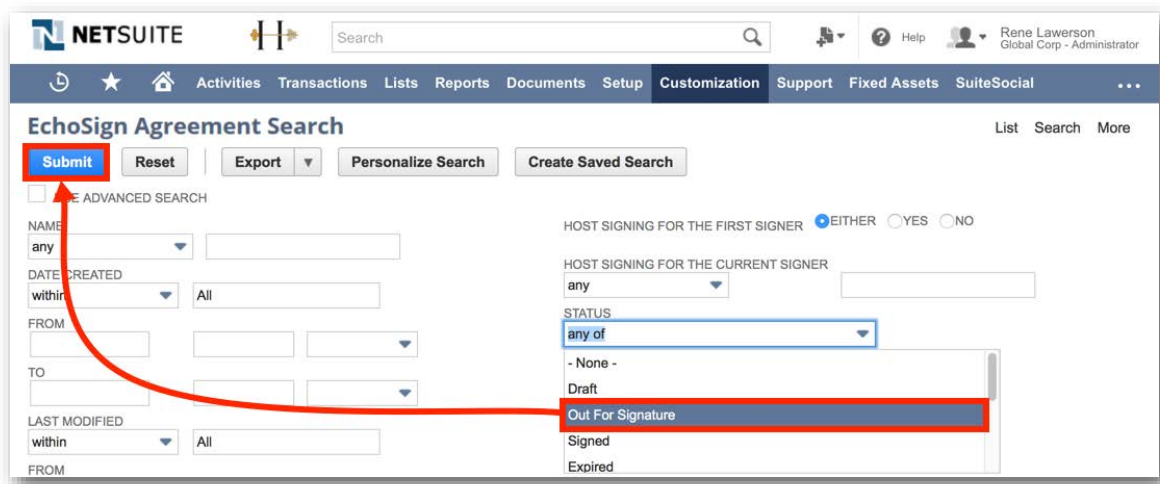
Before updating the bundle

The amount of time required for to update to the v4 bundle depends on the number of agreements that currently have a status of *Out for Signature*. Under normal circumstances, it takes 7 to 10 minutes to update 100 agreements. To determine how many *Out for Signature* agreements you have, do the following:

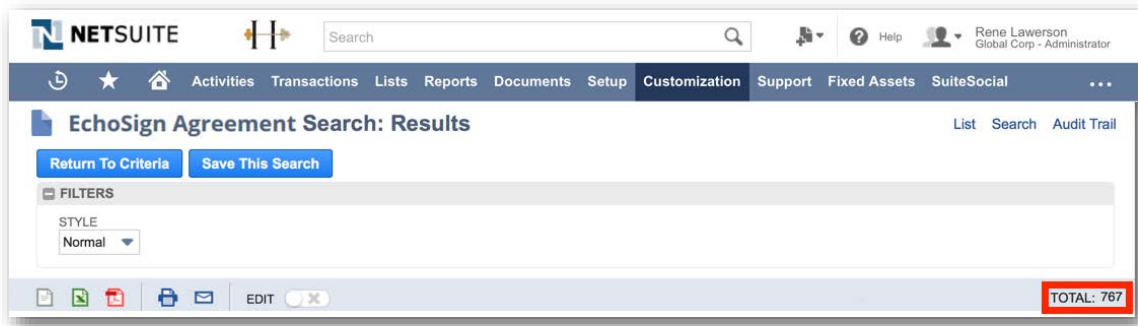
1. Navigate to **Customization > Lists, Records, and Files > Record Types**, then locate *EchoSign Agreement*. (You can also use Global Search).
2. Click the **Search** link to the right.



3. Under *Status*, select the "Out for Signature" option, then click **Submit**.



Note the number of records to estimate your update time.



Updating the bundle

1. Navigate to **Customization > SuiteBundler > Search & Install > List**. Locate your current bundle as shown below.

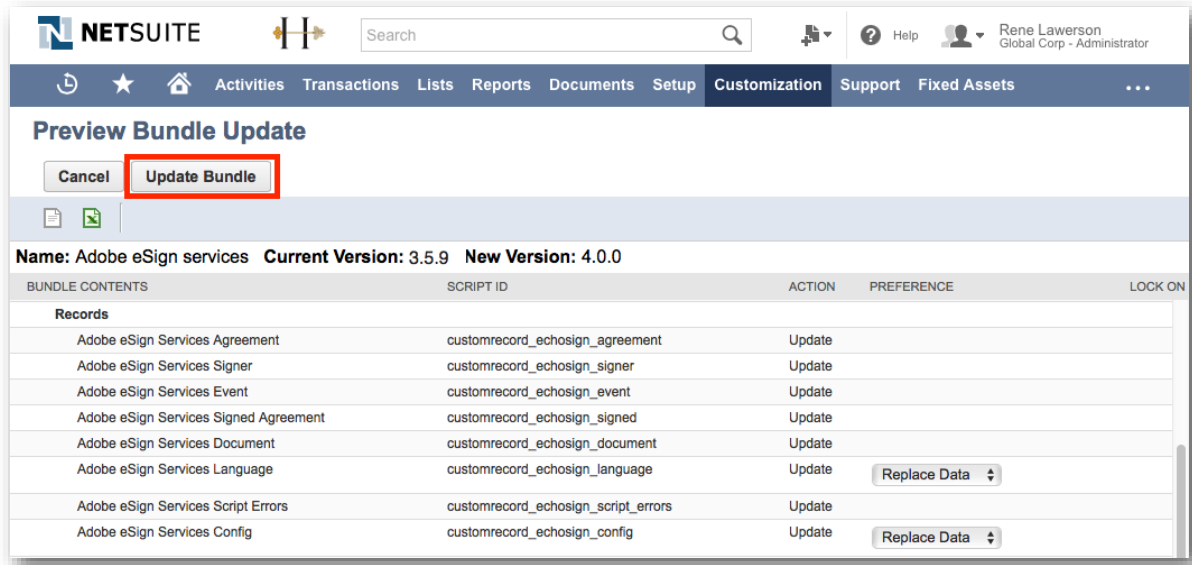


Note: If there is a new version of the bundle, an exclamation point icon displays to the right of the *Version* number of your current bundle.

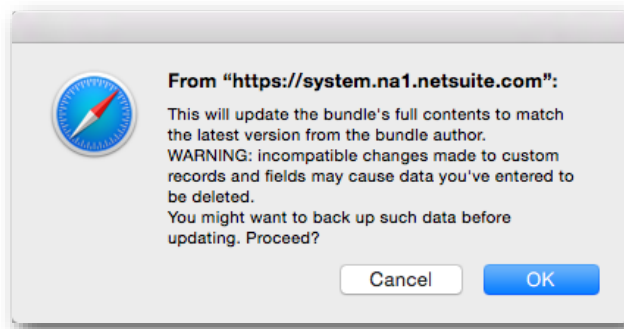
2. From the *Action* drop-down menu, select **Update**.



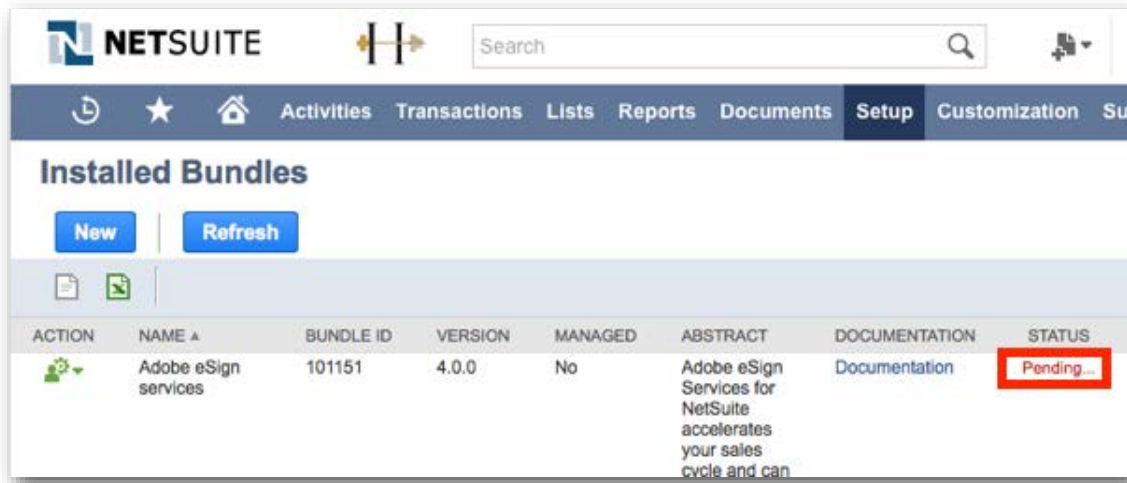
3. On the *Preview Bundle Update* page, click **Update Bundle** without changing any of the default values displayed on the page.



Note: You may get the following warning when updating the bundle. If you have not customized you NetSuite eSignature records, you should be fine to proceed. If you are unsure, it would be best to install the bundle on a Sandbox account to test it first before updating the bundle in a production account.



- During the update installation process, the status of the bundle displays as *Pending*. To display an updated status, click **Refresh**.



Note: If the update appear to be taking a long time because you have a large number of *Out for Signature* agreements, you can check the **Execution Log** sub-tab for the *Adobe eSign Services Bundle Installation* script to determine the progress of your update. (See [Determining the progress of the update](#) for more information.)

After the bundle update is complete, *Adobe eSign services* displays on the *Installed Bundles* page.



Configuring the bundle

If you have installed the bundle for the first time, please follow the [Setting custom preferences for the first time](#) instructions. If you have updated the bundle, please follow the [Setting custom preferences \(existing users\)](#) instructions.

Setting custom preferences for the first time

You can use custom preferences to specify how agreements are created and stored in NetSuite. In addition, the *Auto Provision User in Adobe eSign* preference, introduced in v4, allows you to specify whether NetSuite users are auto-provisioned in eSign services when they send agreements from NetSuite.

1. Navigate to **Setup > Company > General Preferences**.
2. Scroll down the page, then click to select the **Custom Preferences** sub-tab.

The screenshot shows the NetSuite interface with the 'Setup' menu open and 'Custom Preferences' selected. The 'Custom Preferences' sub-tab is highlighted with a red box. The page is divided into two main sections: 'Check Inventory' and 'KB Rating & Case Customizations' on the left, and 'Adobe eSign services' on the right.

Check Inventory:

- MULTI LOCATION FORM TO USE: Multi-Ship To / Multi Location Order

KB Rating & Case Customizations:

- KB RATING IMAGE ID: 2711
- KB RATING BLANK IMAGE ID: 2710
- CUSTOMER CENTER ROLE: Customer Center
- ONLINE CASE FORM: 10

Adobe eSign services:

- ENTER ECHOSIGN API KEY FOR YOUR ACCOUNT: [Empty field]
- ☒ USE PARENT RECORD CONTACT AS SIGNER
- ☐ USE TRANS. CONTACT AS SIGNER IF PRESENT
- ☒ ALLOW MARKING RECIPIENTS AS APPROVERS
- PREFERRED AGREEMENT FOLDER ID: 100
- ☒ AUTO ATTACH TRANSACTION PDF
- ADD SIGNED PDF AS: Attachment
- ☒ INCLUDE AUDIT TRAIL PDF WITH AGREEMENT
- IDENTITY VERIFICATION METHOD APPLIES TO: All Signers
- ☒ ENABLE PASSWORD REQUIRED TO SIGN
- ☐ ENABLE KNOWLEDGE BASED AUTHENTICATION
- ☒ ENABLE WEB IDENTITY AUTHENTICATION
- ☒ AUTO PROVISION USER IN ADOBE ESIGN

3. Enable and configure your Adobe eSign services preferences as needed:
 - **Enter EchoSign API Key for Your Account**—If you are installing for the first time, this field should be left blank. See [Setting custom preferences \(existing users\)](#) for more information.
 - **Use Parent Record Contact as Signer**—If enabled, the parent record contact defaults as the first signer when agreements are created. The sender can easily remove or edit the default signer or add additional signers to the agreement before sending.
 - **Use Trans. Contact as Signer if present**—This preference is valid only if the *Use Parent Record Contact as Signer* preference is also enabled. If enabled, when generating an agreement from a Transaction Record (e.g., Quote), the primary Transaction contact defaults as the first signer. (See [Transaction Records](#) for more information.) If there is no primary Transaction contact, or if sending

from NetSuite object record (e.g., Customer record, Partner record), the default recipient will be the primary contact for the customer email. The sender can easily remove or edit the default signer or add additional signers to the agreement before sending.

- **Allow Marking Recipients as Approvers**—If enabled, senders can mark recipients as approvers. Recipients marked as approvers can review and approve agreements, but they are not required to sign them. Approvers may be required to enter data into fields during the approval process.
- **Preferred Agreement Folder Id**—Used to specify the folder where the final signed agreements will be stored. If you don't set a value for this field, final signed agreements are saved in the same folder as the original document file by default. The Folder Id must be a number.
- **Auto Attach Transaction PDF**—If enabled, Transaction PDFs are automatically attached to agreements when new agreements are created from Transaction records.
- **Add Signed PDF as (Attachment or Link)**—If *Attachment* is selected from the drop-down, the Signed PDF is automatically added as a link to the file. If *Link* is selected from the drop-down, the signed PDF is stored in NetSuite as an attachment on the Agreement record.
- **Include Audit Trail PDF with Agreement**—If enabled, audit trail PDFs are automatically attached to Agreement records after the agreements are signed.
- **Identity Verification Method Applies to**—If you enable any of the three identity verification methods listed below, you can use this preference to determine to whom the identify verification method should be applied. The options are *All Signers*, *External Signers Only*, or *Internal Signers Only*.

Identity Verification Methods

Enabled identity verification method(s) display on the *Adobe eSign Services Agreement* page and can be optionally selected when creating an agreement to be sent for signature. If more than one identity verification method is enabled here in custom preferences, a **Verify Signer Identity** option displays on the *Adobe eSign Services Agreement* page. You can enable that option then select an identity verification method for that agreement.

- **Enable Password Required to Sign**—Require signers to enter a one-time password you specify.
 - **Enable Knowledge Based Authentication**—Require signers to provide their name, address and optionally the last 4 digits of their SSN and then answer a list of questions verifying the information they provided. Available only in the United States.
 - **Enable Web Identity Authentication**—Require signers to verify their identity by signing in to one of the following sites: Facebook, Google, LinkedIn, Microsoft Live, Twitter, or Yahoo!.
 - **Auto Provision User in Adobe eSign**—If enabled, users who send agreements in NetSuite are automatically auto-provisioned with an Adobe Document Cloud eSign services user account.
4. Click **Save** at the top or bottom of the page to save your preferences.

Setting custom preferences (existing users)

The *Auto Provision User in Adobe eSign* preference, introduced in v4, allows you to determine whether NetSuite users are auto-provisioned in eSign services when they send agreements from NetSuite. If you choose to use this feature, you must enable this preference. (See [Setting Custom Preferences for the First Time](#) for more information.)

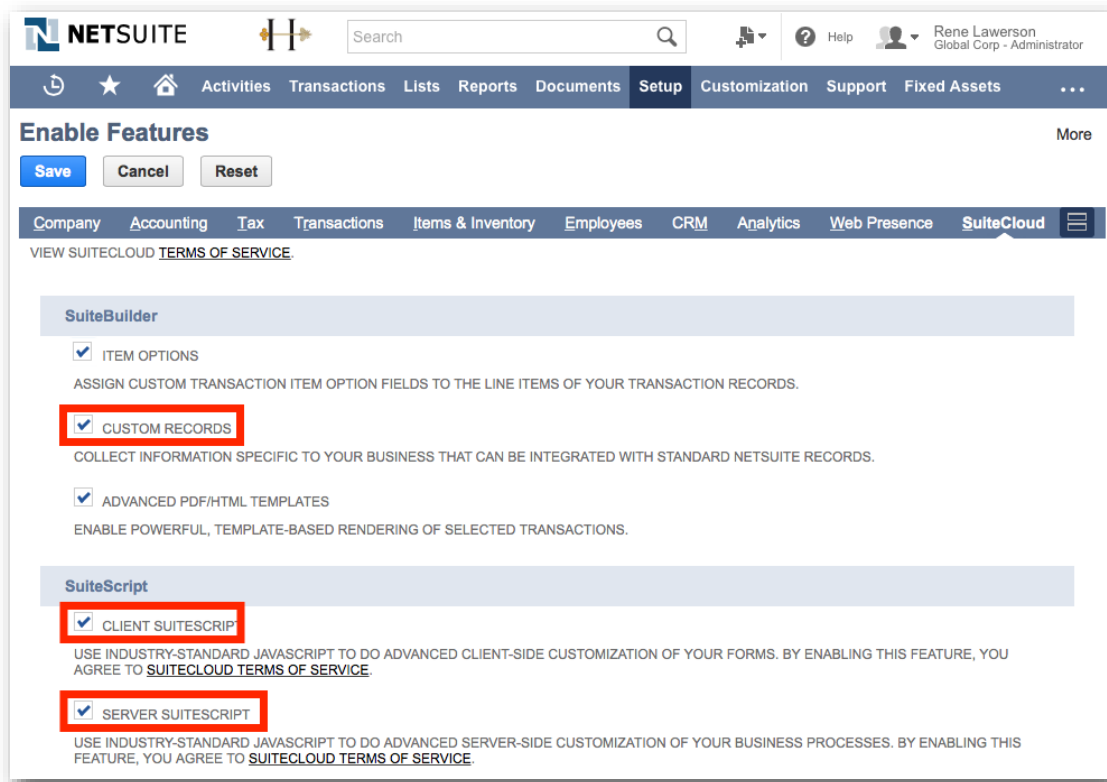
Note: The API key that was used by previous versions of the bundle displays in the **Enter EchoSign API Key for Your Account** field at the top of Custom Preferences. When updating, the API key is required to transition existing agreements created using the API key to the new OAuth model. The API key is only required for customers updating from 3.5.9 to 4.0.0. Once the update is complete and OAuth is configured, the API key is no longer required.

Configuring automatic status updates

The Adobe eSign services integration bundle allows you to automatically receive updates in NetSuite regarding the status of the agreements that have been sent from NetSuite. When this feature is enabled, NetSuite always reflects the current status of your agreements. You can enable automatic status updates as follows:

1. Navigate to **Setup > Company > Enable Features**.
2. Click to select the **SuiteCloud** sub-tab.
3. Enable the following options:
 - In the *SuiteBuilder* section, enable **Custom Records** option.
 - In the SuiteScript section, enable the **Client SuiteScript** and **Server SuiteScript** options and agree to the terms of service for both.

Your options should be set as shown in the image below.



4. Click **Save**.

Objects and record types

The Adobe eSign services integration bundle already exposes the Adobe eSign Services Agreement object with many standard NetSuite objects including: Customer, Estimate, Lead, Opportunity, and Partner records. You can use the Adobe eSign services bundle with other record types as well, including custom records.

The Agreement tab can appear with two types of NetSuite records: *Entity* and *Transaction* records. For our purpose we can usually assume that a *Transaction* record is a record that can be converted into a PDF document— e.g., a Quote—whereas an *Entity* record cannot.

Transaction records

If the agreement is created from a Transaction record, the first document on the agreement record will be the PDF version of the record it came from and the first recipient will be the email address of the record. If you don't want the first document to be a PDF version of the record it came from, disable the *Auto Attach Transaction PDF* option under **Setup > Company > General Preferences > Custom Preferences sub-tab** (See [Setting Custom Preferences](#) for more information.)

Under Custom Preferences, you can also enable the *Use Trans. Contact as First Signer* preference if you want the primary transaction contact to be added automatically as the first signer.

When associated with a Transaction record, both the **Agreements** tab as well as a **Send for Signature** button display.

The screenshot displays the NetSuite interface for a Quote record (QUO00001007) associated with Ashley Smoth. The 'Send For Signature' button is highlighted with a red box. Below the quote details, the 'Agreements' tab is highlighted with a red box, showing a table for new agreements.

AGREEMENT NAME	STATUS	DATE SENT	SIGNED DATE	SIGNED DOCUMENT	DELETE AGREEMENT
No records to show.					

Entity records

If the agreement is created from an Entity record the first recipient will be the email address from the record. When associated with an Entity record, only the Agreements tab displays.

Customizing the bundle

Customizing the bundle includes the following:

- Deploying the scripts for the *Agreements* sub-tab and the *Send for Signature* button for the appropriate record types.
- Setting role permissions for your Adobe eSign services record types.
- Modifying permissions to grant access to the *Agreements* sub-tab and the *Send for Signature* button.

Configuring Adobe eSign services agreements for additional record types

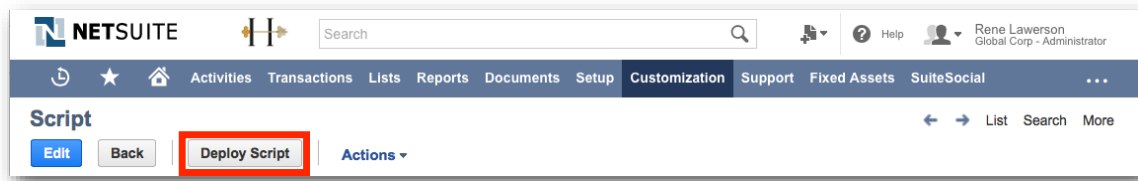
To deploy the *Agreements* sub-tab and the *Send for Signature* button for the appropriate record types, follow the steps below.

1. Navigate to **Customization > Scripting > Scripts**. The *Scripts* list page displays.

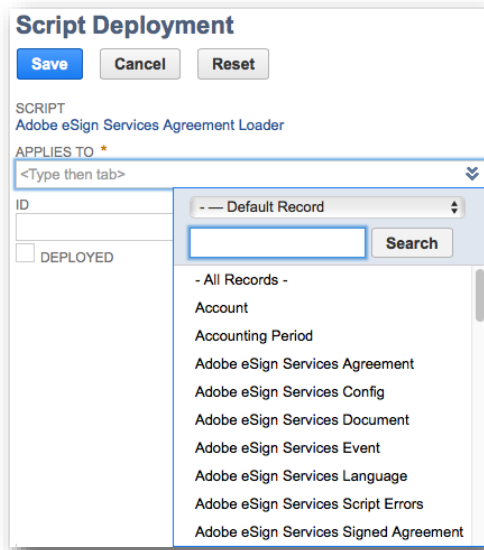
EDIT VIEW	NAME	FROM BUNDLE	ID	TYPE	DEPLOYMENTS	SCRIPT	LIBRARY SCRIPT
Edit View	Adobe eSign Mark To Update Parent Links	101151	customscript_echoesign_update_is_process	User Event	Deployments	EchoSign_MarkToUpdateParentLinks.js	
Edit View	Adobe eSign Services Agreement Creator	101151	customscript_echoesign_agreement_creator	Suitelet	Deployments	EchoSign_AgreementCreator_09152015.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Agreement CS	101151	customscript_echoesign_agreement_field_va	Client	Deployments	EchoSign_Agreement_Window_CS.js	
Edit View	Adobe eSign Services Agreement Loader	101151	customscript_echoesign_agreement_loader	User Event	Deployments	EchoSign_LoadAgreement_SS_04012010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Agreement Manager	101151	customscript_echoesign_agreement_manager	User Event	Deployments	EchoSign_Agreement_Manager_SS_03192011.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Bundle Installation	101151	customscript_echoesign_update_bundle	Bundle Installation	Deployments	EchoSign_Bundle_Installation.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Document Manager	101151	customscript_echoesign_document_manager	User Event	Deployments	EchoSign_Document_SS_04132010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Estimate Button	101151	customscript_echoesign_estimate_button	User Event	Deployments	EchoSign_EstimateAgreement_SS_03302010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services External Update	101151	customscript_echoesign_update	Suitelet	Deployments	EchoSign_ExternalUpdate_SS_03092010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Login Button	101151	customscript_echoesign_auth_login_button	User Event	Deployments	EchoSign_OAuth_ConfigButton.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services OAuth Authorization	101151	customscript_echoesign_auth_authorize	Suitelet	Deployments	EchoSign_OAuthAuthorization_Manager.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Service Manager	101151	customscript_echoesign_service_manager	Suitelet	Deployments	EchoSign_ServiceManager_SS_03172011.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Update Agreements	101151	customscript_echoesign_agreement_sched	Scheduled	Deployments	EchoSign_UpdateAgreementSchedule_SS_03172011.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Update Agreement Parent Link	101151	customscript_echoesign_fix_links	Scheduled	Deployments	EchoSign_UpdateAgreementParentLinks.js	EchoSign_GlobalObjects.js

2. On the *Scripts* list page, locate the script you need to deploy, then click **View**.
 - To add the **Send for Signature** button, select the *Adobe eSign Services Estimate Button* script.
 - To add the **Agreements** tab, select the *Adobe eSign Services Agreement Loader* script.

3. On the *Script* page, click the **Deploy Script** Button.



4. On the *Script Deployment* page, do the following:
 - a) From the *Applies To* list, select the type of record.



- b) Optionally, enter script deployment ID. (See the *Creating a Custom Script Deployment ID* topic in the NetSuite Help Center for more information.) If you do not enter an ID, one is generated.
- c) Check the **Deployed** checkbox.
- d) Set *Status* to **Released**.



Note: You do not need to specify an *Event Type* or *Log Level*.

- e) From the *Execute As Role* drop-down, select **Execute as Admin**.
- f) With the **Audience** sub-tab active (it is active by default), select the specific roles or users that you want to grant access to. If you want to grant access to all roles and users, enable the respective **Select all** options.
- g) Click **Save**. When the change confirmation displays, click **Go Back**.



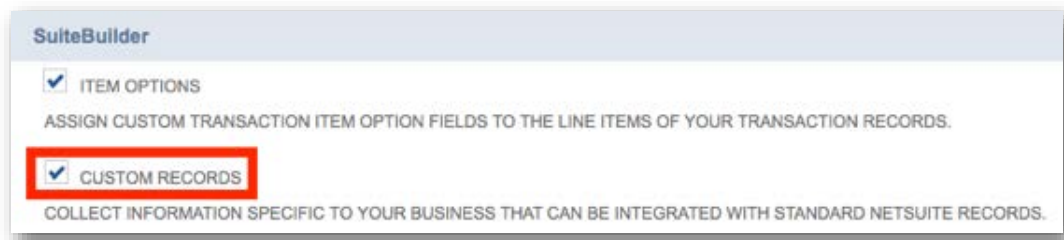
- 5. Click **List** at the top of the Script Deployment page to get back to the *Scripts* list page.
- 6. Repeat steps 2 and 3 above for the other script.

Setting role permissions for Adobe eSign services record types

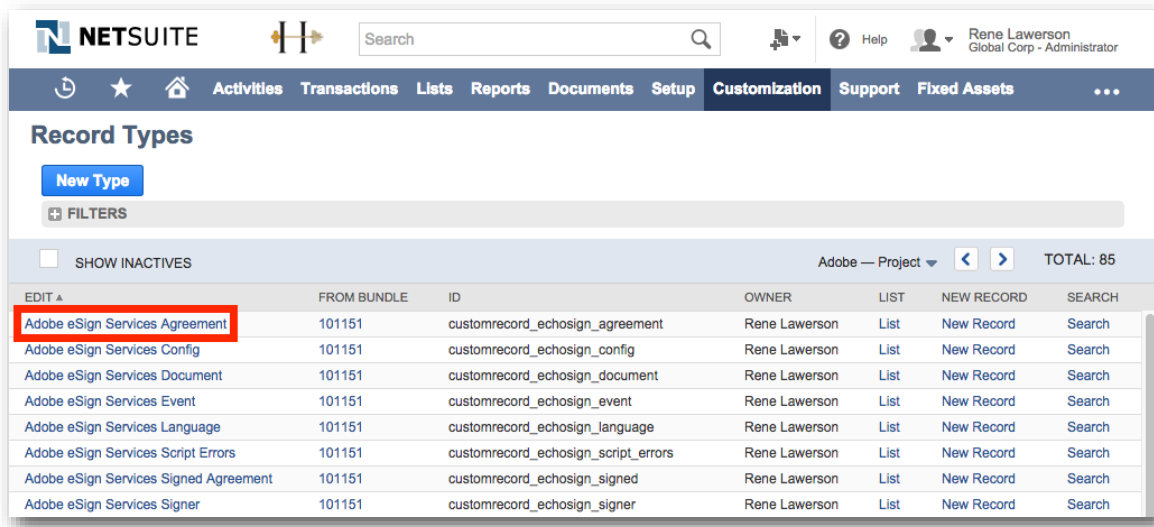
Most NetSuite roles should have permission to use Adobe eSign services without additional customization. However, you may need to grant permissions for any additional custom roles that have been created.

- 1. Navigate to **Customization > Lists, Records, & Files > Records Types**.

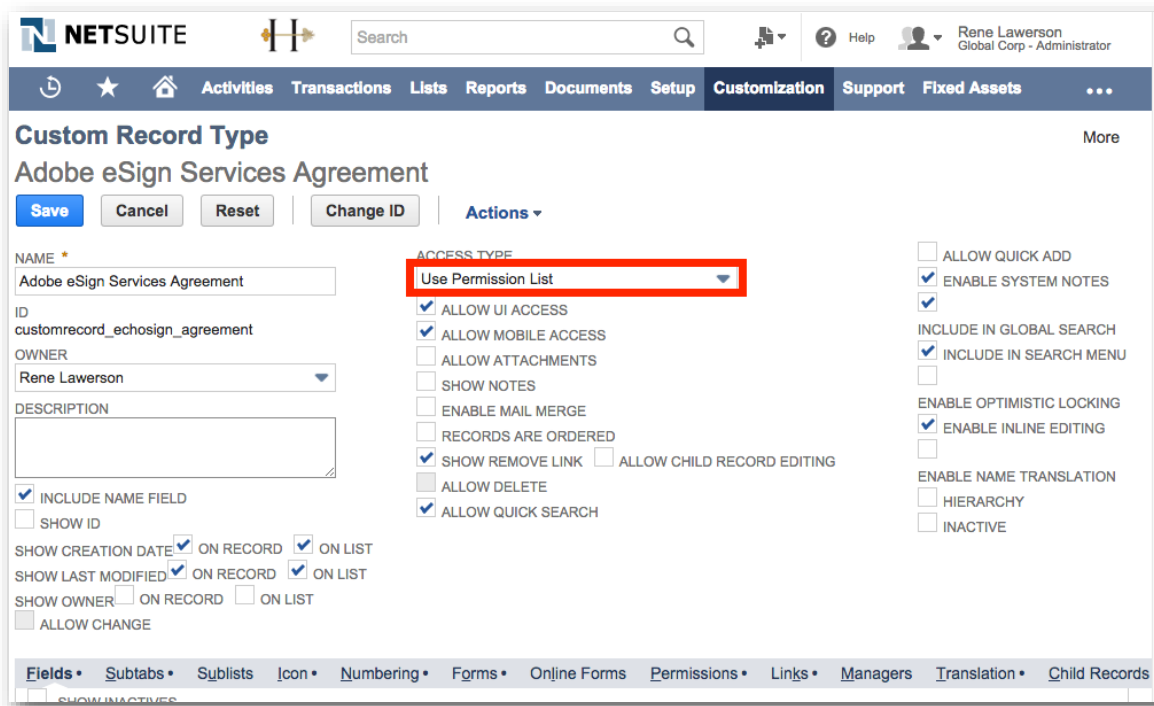
Note: If you do not see the *Record Types* item, navigate to **Setup > Company > Enable Features > Suite Cloud tab** and enable the *Custom Records* option.



- On the *Record Types* page, click **Adobe eSign Services Agreement** to select it.

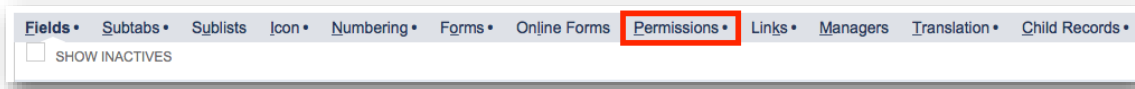


- On the *Custom Record Type* page, select **Use Permission List** from the *Access Type* drop-down.



Note: The *Adobe eSign Services Agreement* record type is the only Adobe eSign services record type that required the Uses Permission List access type. See step 6 for instructions on setting the access type for the other Adobe eSign services record types.

- Click to select the **Permissions** sub-tab.



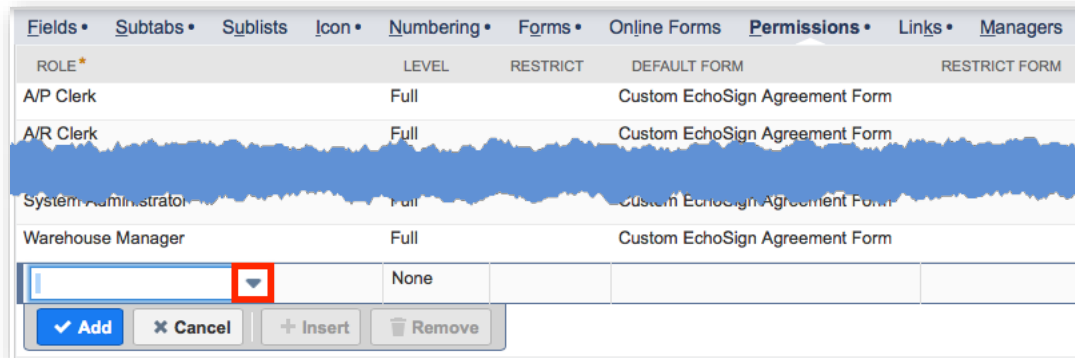
The list of roles and permissions displays.

Fields •	Subtabs •	Sublists	Icon •	Numbering •	Forms •	Online Forms	Permissions •	Links •	Managers
ROLE *			LEVEL	RESTRICT	DEFAULT FORM		RESTRICT FORM		
A/P Clerk			Full		Custom EchoSign Agreement Form				
A/R Clerk			Full		Custom EchoSign Agreement Form				
Accountant			Full		Custom EchoSign Agreement Form				
Accountant (Reviewer)			Full		Custom EchoSign Agreement Form				
Administrator			Full		Custom EchoSign Agreement Form				
Advanced Partner Center			Full		Custom EchoSign Agreement Form				
CEO			Full		Custom EchoSign Agreement Form				
CEO(Hands Off)			Full		Custom EchoSign Agreement Form				
CFO			Full		Custom EchoSign Agreement Form				
Employee Center			Full		Custom EchoSign Agreement Form				
Full Access			Full		Custom EchoSign Agreement Form				
Intranet Manager			Full		Custom EchoSign Agreement Form				
Marketing Administrator			Full		Custom EchoSign Agreement Form				
Marketing Assistant			Full		Custom EchoSign Agreement Form				
Marketing Manager			Full		Custom EchoSign Agreement Form				
Project Manager			Full		Custom EchoSign Agreement Form				
Retail Clerk			Full		Custom EchoSign Agreement Form				
Sales Administrator			Full		Custom EchoSign Agreement Form				
Sales Manager			Full		Custom EchoSign Agreement Form				
Sales Person			Full		Custom EchoSign Agreement Form				
Sales Vice President			Full		Custom EchoSign Agreement Form				
Store Manager			Full		Custom EchoSign Agreement Form				
Support Administrator			Full		Custom EchoSign Agreement Form				
Support Manager			Full		Custom EchoSign Agreement Form				
Support Person			Full		Custom EchoSign Agreement Form				
System Administrator			Full		Custom EchoSign Agreement Form				
Warehouse Manager			Full		Custom EchoSign Agreement Form				
<div><div></div></div>			None						
<div><div>✓ Add</div><div>✕ Cancel</div><div>✚ Insert</div><div>✚ Remove</div></div>									

- Set permissions as follows for the additional custom roles added to the "Adobe eSign Services Agreement" record type.

Note: See the *Setting Up a Permissions List for a Custom Record Type* topic in the NetSuite Help Center for more information.

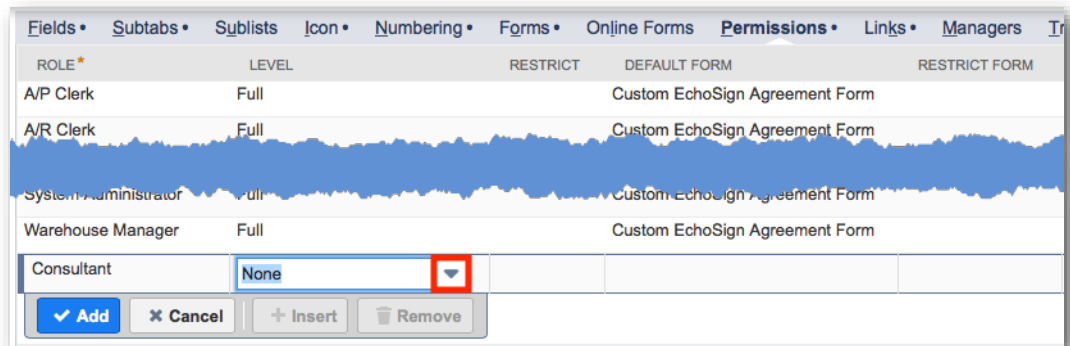
- Select the role from the *Role* list.



ROLE *	LEVEL	RESTRICT	DEFAULT FORM	RESTRICT FORM
A/P Clerk	Full		Custom EchoSign Agreement Form	
A/R Clerk	Full		Custom EchoSign Agreement Form	
System Administrator	Full		Custom EchoSign Agreement Form	
Warehouse Manager	Full		Custom EchoSign Agreement Form	
Consultant	None			

Buttons: Add, Cancel, Insert, Remove

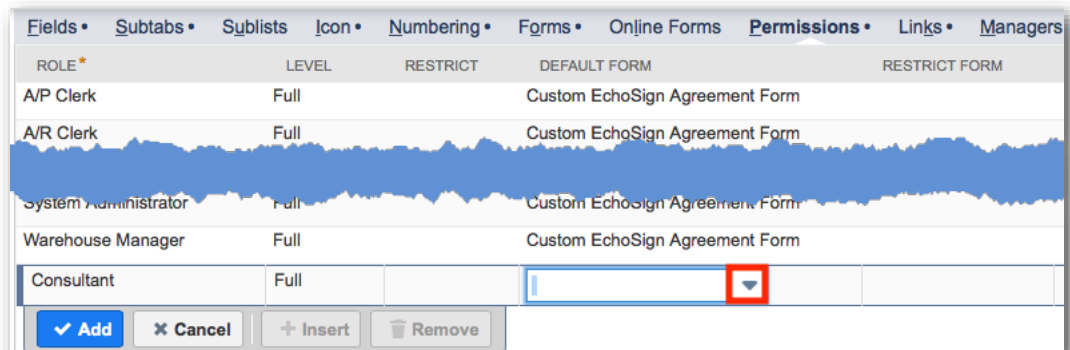
- Set *Level* to **Full**.



ROLE *	LEVEL	RESTRICT	DEFAULT FORM	RESTRICT FORM
A/P Clerk	Full		Custom EchoSign Agreement Form	
A/R Clerk	Full		Custom EchoSign Agreement Form	
System Administrator	Full		Custom EchoSign Agreement Form	
Warehouse Manager	Full		Custom EchoSign Agreement Form	
Consultant	None			

Buttons: Add, Cancel, Insert, Remove

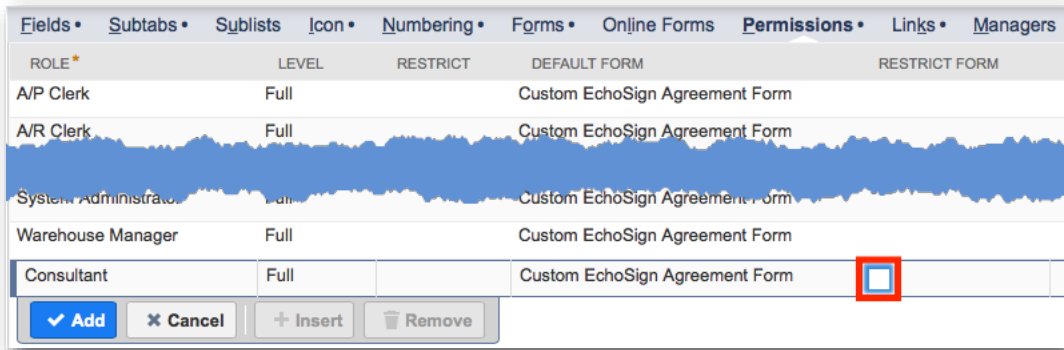
- Set *Default Form* to **Custom EchoSign Agreement Form**.



ROLE *	LEVEL	RESTRICT	DEFAULT FORM	RESTRICT FORM
A/P Clerk	Full		Custom EchoSign Agreement Form	
A/R Clerk	Full		Custom EchoSign Agreement Form	
System Administrator	Full		Custom EchoSign Agreement Form	
Warehouse Manager	Full		Custom EchoSign Agreement Form	
Consultant	Full			

Buttons: Add, Cancel, Insert, Remove

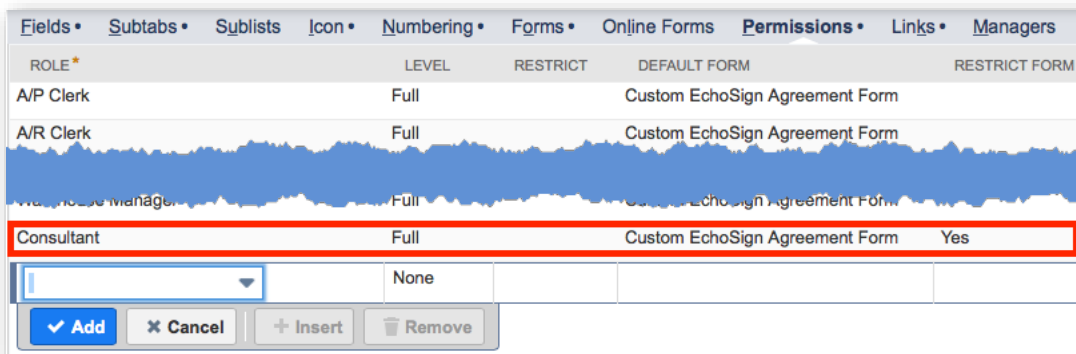
d) Click to check the *Restrict Form* check box.



ROLE	LEVEL	RESTRICT	DEFAULT FORM	RESTRICT FORM
A/P Clerk	Full		Custom EchoSign Agreement Form	
A/R Clerk	Full		Custom EchoSign Agreement Form	
System Administrator	Full		Custom EchoSign Agreement Form	
Warehouse Manager	Full		Custom EchoSign Agreement Form	
Consultant	Full		Custom EchoSign Agreement Form	<input checked="" type="checkbox"/>

Buttons: Add, Cancel, Insert, Remove

e) Click **Add** to save the changes for the role row. The new row displays as shown below.



ROLE	LEVEL	RESTRICT	DEFAULT FORM	RESTRICT FORM
A/P Clerk	Full		Custom EchoSign Agreement Form	
A/R Clerk	Full		Custom EchoSign Agreement Form	
Warehouse Manager	Full		Custom EchoSign Agreement Form	
Consultant	Full		Custom EchoSign Agreement Form	Yes

Buttons: Add, Cancel, Insert, Remove

f) Repeat steps a through e above for all additional custom roles.

g) Click **Save** on the *Custom Record Type* page when permissions for all roles have been set. The *Customer Record Type* page redisplay.

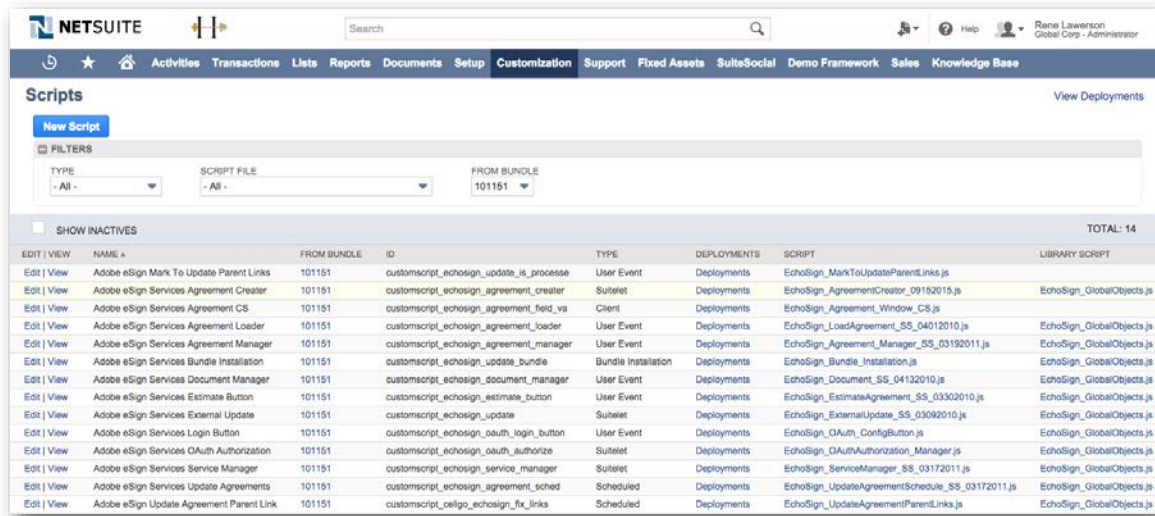
6. Repeat steps 1 to 3 above to set the *Access Type* for all the other Adobe eSign Services record types to **No Permission Required**. This applies to following record types:
 - Adobe eSign Services Config
 - Adobe eSign Services Document
 - Adobe eSign Services Event
 - Adobe eSign Services Language
 - Adobe eSign Services Script Errors
 - Adobe eSign Services Signed Agreement
 - Adobe eSign Services Signer

Granting access to the Agreement tab and Send For Signature button

As previously mentioned, the Adobe eSign services integration bundle already exposes the Adobe eSign Services Agreement object with many standard NetSuite objects (Customer, Estimate [Quote], Lead, etc.). The *Agreement* sub-tab is automatically enabled for the following types of objects: Customer, Lead, Opportunity, Partner, Prospect, Quote, and Vendor Bill. The *Send for Signature* button is automatically enabled only for the Quote object. NetSuite administrators can extend the ability to create agreements to additional CRM objects by modifying permissions to add the *Agreement* sub-tab, *Send for Signature* button, or both to those objects.

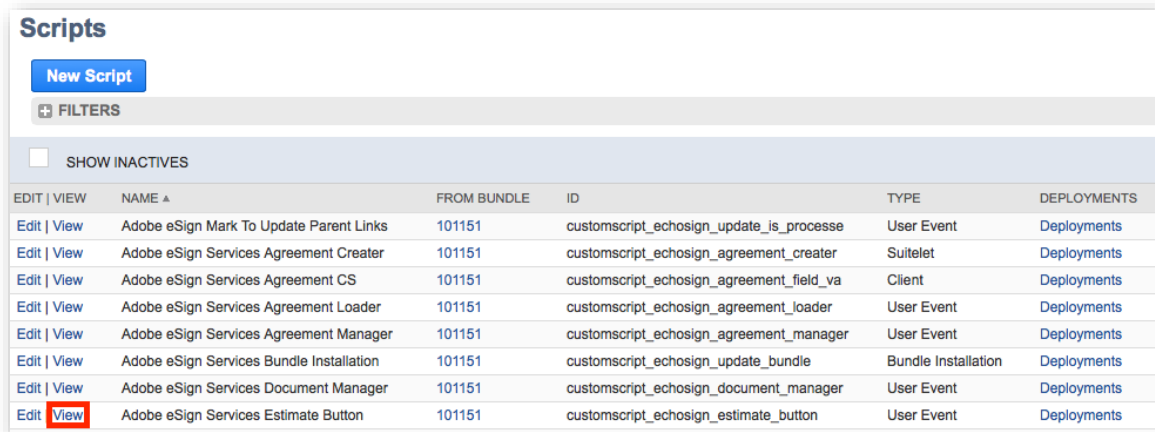
Modifying permissions to grant access to the Send for Signature button

1. Navigate to **Customization > Scripting > Scripts**. The *Scripts* list page displays. If necessary, use the filters to locate the Adobe eSign Services scripts.



EDIT VIEW	NAME	FROM BUNDLE	ID	TYPE	DEPLOYMENTS	SCRIPT	LIBRARY SCRIPT
Edit View	Adobe eSign Mark To Update Parent Links	101151	customscript_echosign_update_is_processe	User Event	Deployments	EchoSign_MarkToUpdateParentLinks.js	
Edit View	Adobe eSign Services Agreement Creator	101151	customscript_echosign_agreement_creator	Suitelet	Deployments	EchoSign_AgreementCreator_09152015.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Agreement CS	101151	customscript_echosign_agreement_field_va	Client	Deployments	EchoSign_Agreement_Window_CS.js	
Edit View	Adobe eSign Services Agreement Loader	101151	customscript_echosign_agreement_loader	User Event	Deployments	EchoSign_LoadAgreement_SS_04012010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Agreement Manager	101151	customscript_echosign_agreement_manager	User Event	Deployments	EchoSign_Agreement_Manager_SS_03192011.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Bundle Installation	101151	customscript_echosign_update_bundle	Bundle Installation	Deployments	EchoSign_Bundle_Installation.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Document Manager	101151	customscript_echosign_document_manager	User Event	Deployments	EchoSign_Document_SS_04132010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Estimate Button	101151	customscript_echosign_estimate_button	User Event	Deployments	EchoSign_EstimateAgreement_SS_03302010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services External Update	101151	customscript_echosign_update	Suitelet	Deployments	EchoSign_ExternalUpdate_SS_03092010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Login Button	101151	customscript_echosign_oauth_login_button	User Event	Deployments	EchoSign_OAuth_ConfigButton.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services OAuth Authorization	101151	customscript_echosign_oauth_authorize	Suitelet	Deployments	EchoSign_OAuthAuthorization_Manager.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Service Manager	101151	customscript_echosign_service_manager	Suitelet	Deployments	EchoSign_ServiceManager_SS_03172011.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Update Agreements	101151	customscript_echosign_agreement_sched	Scheduled	Deployments	EchoSign_UpdateAgreementSchedule_SS_03172011.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Update Agreement Parent Link	101151	customscript_echosign_fix_links	Scheduled	Deployments	EchoSign_UpdateAgreementParentLinks.js	EchoSign_GlobalObjects.js

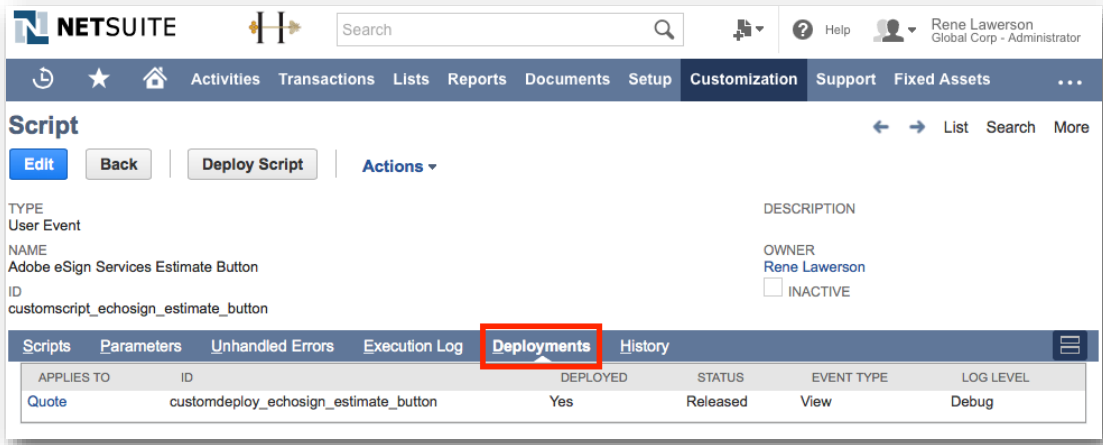
2. On the *Scripts* page, locate the *Adobe eSign Services Estimate Button* script (controls the *Send for Signature* button), then click **View**.



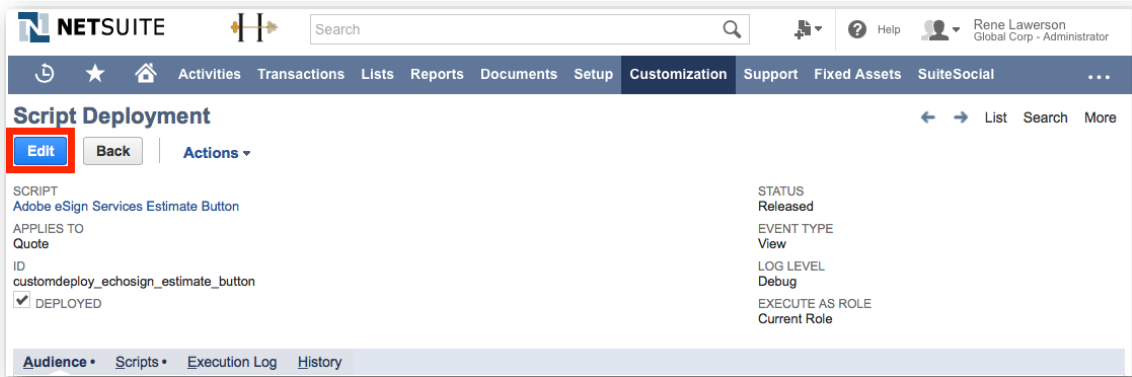
EDIT VIEW	NAME	FROM BUNDLE	ID	TYPE	DEPLOYMENTS
Edit View	Adobe eSign Mark To Update Parent Links	101151	customscript_echosign_update_is_processe	User Event	Deployments
Edit View	Adobe eSign Services Agreement Creator	101151	customscript_echosign_agreement_creator	Suitelet	Deployments
Edit View	Adobe eSign Services Agreement CS	101151	customscript_echosign_agreement_field_va	Client	Deployments
Edit View	Adobe eSign Services Agreement Loader	101151	customscript_echosign_agreement_loader	User Event	Deployments
Edit View	Adobe eSign Services Agreement Manager	101151	customscript_echosign_agreement_manager	User Event	Deployments
Edit View	Adobe eSign Services Bundle Installation	101151	customscript_echosign_update_bundle	Bundle Installation	Deployments
Edit View	Adobe eSign Services Document Manager	101151	customscript_echosign_document_manager	User Event	Deployments
Edit View	Adobe eSign Services Estimate Button	101151	customscript_echosign_estimate_button	User Event	Deployments

Adobe Document Cloud eSign Services

3. On the *Script* page, do the following:
 - a) Click the **Deployments** sub-tab.



- b) Under "Applies to" click the **Quote** link.
 - c) In the *Script Deployment* page, click the **Edit** button.



- d) With the **Audience** sub-tab active (it is active by default), select the specific roles or users that you want to grant access to. If you want to grant access to all roles and users, enable the respective **Select all** options as shown below.

Script Deployment

Save Cancel Reset Change ID Actions

SCRIPT
Adobe eSign Services Estimate Button

APPLIES TO
Quote

ID
customdeploy_echosign_estimate_button

☒ DEPLOYED

STATUS
Released

EVENT TYPE
View

LOG LEVEL
Debug

EXECUTE AS ROLE
Current Role

Audience Scripts Execution Log History

ROLES ☒ Select All

01: Senior Executive

02: Engineering

03: Inside Sales

03: VP Sales

04: Purchasing

DEPARTMENTS

Admin

Engineering

Marketing

Production

Production : Assembly

SUBSIDIARIES

Honeycomb Holdings Inc.

Honeycomb Holdings Inc. : Honeycomb Mfg

Honeycomb Holdings Inc. : test sub

GROUPS

3D Printer

Assembly Cell

Corporate East

Corporate West

Finishing

EMPLOYEES ☒ Select All

Alex Wolfe

Amy Nguyen

Brad M Sparling

Clark Koozer

Dale Williams

PARTNERS ☒ Select All

Jasper Supply

- e) Click **Save**.

Modifying permissions to grant access to the Agreements tab

1. Navigate to **Customization > Scripting > Scripts**. The *Scripts* page displays. If necessary, use the filters to locate the Adobe eSign Services scripts.

NETSUITE

Search

Activities Transactions Lists Reports Documents Setup Customization Support Fixed Assets SuiteSocial Demo Framework Sales Knowledge Base

Scripts View Deployments

New Script

FILTERS

TYPE: All

SCRIPT FILE: All

FROM BUNDLE: 101151

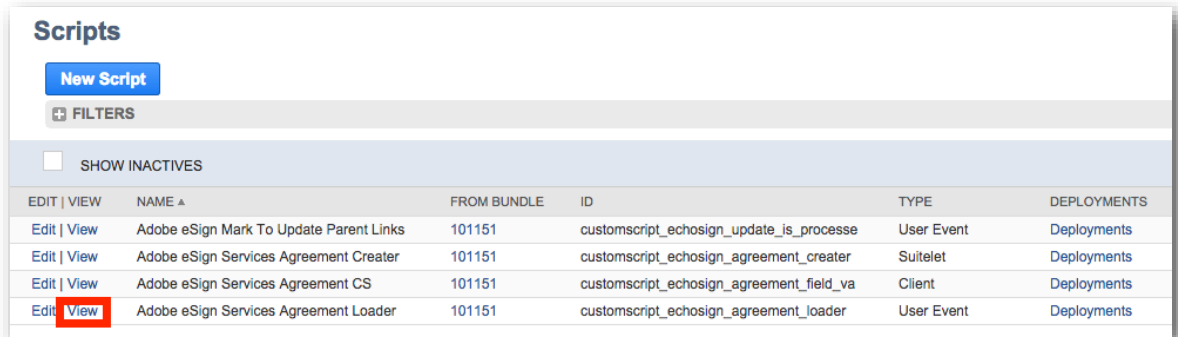
SHOW INACTIVES

TOTAL: 14

EDIT VIEW	NAME	FROM BUNDLE	ID	TYPE	DEPLOYMENTS	SCRIPT	LIBRARY SCRIPT
Edit View	Adobe eSign Mark To Update Parent Links	101151	customscript_echosign_update_is_processe	User Event	Deployments	EchoSign_MarkToUpdateParentLinks.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Agreement Creator	101151	customscript_echosign_agreement_creator	Suitelet	Deployments	EchoSign_AgreementCreator_09152015.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Agreement CS	101151	customscript_echosign_agreement_field_va	Client	Deployments	EchoSign_Agreement_Window_CS.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Agreement Loader	101151	customscript_echosign_agreement_loader	User Event	Deployments	EchoSign_LoadAgreement_SS_04012010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Agreement Manager	101151	customscript_echosign_agreement_manager	User Event	Deployments	EchoSign_Agreement_Manager_SS_03192011.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Bundle Installation	101151	customscript_echosign_update_bundle	Bundle Installation	Deployments	EchoSign_Bundle_Installation.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Document Manager	101151	customscript_echosign_document_manager	User Event	Deployments	EchoSign_Document_SS_04132010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Estimate Button	101151	customscript_echosign_estimate_button	User Event	Deployments	EchoSign_EstimateAgreement_SS_03302010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services External Update	101151	customscript_echosign_update	Suitelet	Deployments	EchoSign_ExternalUpdate_SS_03092010.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Login Button	101151	customscript_echosign_oauth_login_button	User Event	Deployments	EchoSign_OAuth_ConfigButton.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services OAuth Authorization	101151	customscript_echosign_oauth_authorize	Suitelet	Deployments	EchoSign_OAuthAuthorization_Manager.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Service Manager	101151	customscript_echosign_service_manager	Suitelet	Deployments	EchoSign_ServiceManager_SS_03172011.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Services Update Agreements	101151	customscript_echosign_agreement_sched	Scheduled	Deployments	EchoSign_UpdateAgreementSchedule_SS_03172011.js	EchoSign_GlobalObjects.js
Edit View	Adobe eSign Update Agreement Parent Link	101151	customscript_celigo_echosign_fix_links	Scheduled	Deployments	EchoSign_UpdateAgreementParentLinks.js	EchoSign_GlobalObjects.js

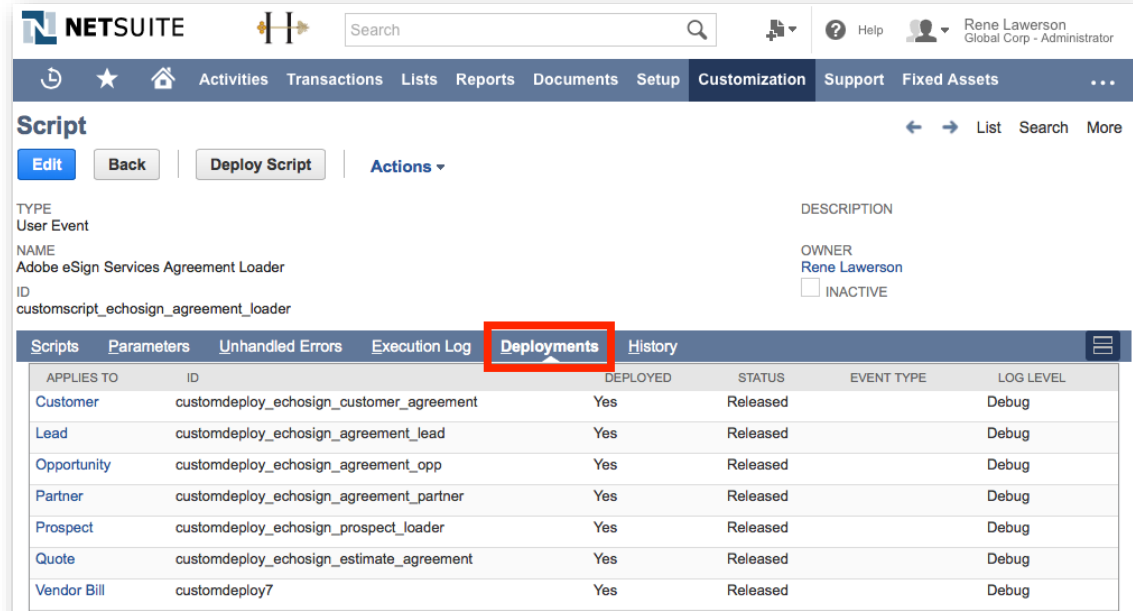
Adobe Document Cloud eSign Services

- On the *Scripts* page, locate the *Adobe eSign Services Agreement Loader* script (controls the *Agreements* tab), then click **View**.



EDIT VIEW	NAME	FROM BUNDLE	ID	TYPE	DEPLOYMENTS
Edit View	Adobe eSign Mark To Update Parent Links	101151	customscript_echosign_update_is_processe	User Event	Deployments
Edit View	Adobe eSign Services Agreement Creator	101151	customscript_echosign_agreement_creator	Suitelet	Deployments
Edit View	Adobe eSign Services Agreement CS	101151	customscript_echosign_agreement_field_va	Client	Deployments
Edit View	Adobe eSign Services Agreement Loader	101151	customscript_echosign_agreement_loader	User Event	Deployments

- On the *Script* page, do the following:
 - Click the **Deployments** sub-tab.



APPLIES TO	ID	DEPLOYED	STATUS	EVENT TYPE	LOG LEVEL
Customer	customdeploy_echosign_customer_agreement	Yes	Released		Debug
Lead	customdeploy_echosign_agreement_lead	Yes	Released		Debug
Opportunity	customdeploy_echosign_agreement_opp	Yes	Released		Debug
Partner	customdeploy_echosign_agreement_partner	Yes	Released		Debug
Prospect	customdeploy_echosign_prospect_loader	Yes	Released		Debug
Quote	customdeploy_echosign_estimate_agreement	Yes	Released		Debug
Vendor Bill	customdeploy7	Yes	Released		Debug

- Under "Applies to" click the link for the entity (*Quote* in this example) that you want to modify access for.

- c) On the *Script Deployment* page, click the **Edit** button.

The screenshot shows the NetSuite interface with the 'Script Deployment' page. The 'Edit' button is highlighted with a red box. The page displays the following information:

- SCRIPT:** Adobe eSign Services Agreement Loader
- APPLIES TO:** Quote
- ID:** customdeploy_echosign_estimate_agreement
- DEPLOYED:** ☒
- STATUS:** Released
- EVENT TYPE:**
- LOG LEVEL:** Debug
- EXECUTE AS ROLE:** Current Role

At the bottom, there are tabs for **Audience**, **Scripts**, **Execution Log**, and **History**.

- d) With the **Audience** sub-tab active (it is active by default), select the specific roles or users that you want to grant access to. If you want to grant access to all roles and users, enable the respective **Select all** options.

The screenshot shows the 'Script Deployment' page with the 'Audience' sub-tab active. The page displays the following information:

- SCRIPT:** Adobe eSign Services Agreement Loader
- APPLIES TO:** Quote
- ID:** customdeploy_echosign_estimate_agreement
- DEPLOYED:** ☒
- STATUS:** Released
- EVENT TYPE:**
- LOG LEVEL:** Debug
- EXECUTE AS ROLE:** Current Role

Under the **Audience** tab, there are several selection options:

- ROLES:** ☒ **Select All**. List includes: 01: Senior Executive, 02: Engineering, 03: Inside Sales, 03: VP Sales, 04: Purchasing.
- DEPARTMENTS:** List includes: Admin, Engineering, Marketing, Production, Production : Assembly.
- SUBSIDIARIES:** List includes: Honeycomb Holdings Inc., Honeycomb Holdings Inc. : Honeycomb Mfg, Honeycomb Holdings Inc. : test sub.
- GROUPS:** List includes: 3D Printer, Assembly Cell, Corporate East, Corporate West, Finishing.
- EMPLOYEES:** ☒ **Select All**. List includes: Alex Wolfe, Amy Nguyen, Brad M Sparling, Clark Koozer, Dale Williams.
- PARTNERS:** ☒ **Select All**. List includes: Jasper Supply.

- e) Click **Save**.

4. Click **List** at the top of the *Script Deployment* page to get back to the *Scripts* list page.

Using the eSign services for NetSuite bundle

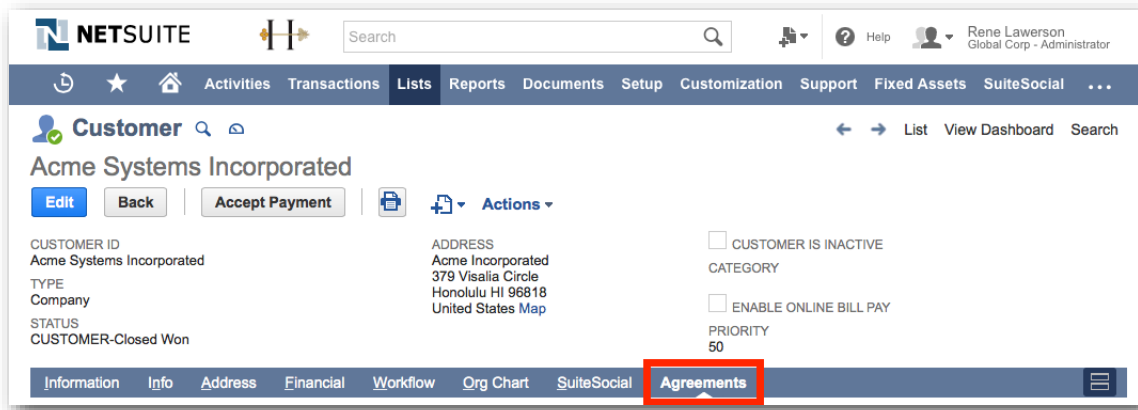
In order to send agreements from NetSuite and receive updates on those agreements, users must have the same log in ID (email address) in NetSuite and in Adobe Document Cloud eSign services.

Creating an Adobe eSign services agreement

After installing a new bundle in a Sandbox or Production account, you should test the bundle by creating a new agreement. You can create Adobe eSign services agreements from an entity record, from a transaction record, or as a standalone agreement.

Note: The process for creating an agreement differs slightly depending on how it is created. The general process involves specifying the options for your agreement, adding one or more agreement documents, and specifying the recipients. The process described below assumes that you are creating the agreement from a customer record.


1. Select or create a customer record you would like to send an agreement from or you can select another NetSuite record type that has the Agreements tab enabled.
2. From that record, click on the **Agreements** sub-tab.



3. Click **New Agreement**.



4. On the *Adobe eSign Services Agreement* page, click **Edit**.



Help
Rene Lawerson
Global Corp - Administrator


[Activities](#)
[Transactions](#)
[Lists](#)
[Reports](#)
[Documents](#)
[Setup](#)
[Customization](#)
[Support](#)
[Fixed Assets](#)


Adobe eSign Services Agreement
← → List Search




Agreement for Acme Systems Incorporated



[Edit](#)
[Back](#)
[Send For Signature](#)
[Print](#)
[Actions](#)

The page updates.








Activities Transactions **Lists** Reports Documents Setup Customization Support Fixed Assets SuiteSocial ...



List Search Customize More

Adobe eSign Services Agreement

Agreement for Acme Systems Incorporated

Save

Cancel

Reset

Actions

AGREEMENT NAME *

Agreement for Acme Systems Incorporated

MESSAGE

SIGNATURE TYPE

e-Signature

☐ I ALSO NEED TO SIGN THIS AGREEMENT

SIGNATURE ORDER

-NONE-

☐ PREVIEW DOCUMENT OR POSITION SIGNATURES

☐ VERIFY SIGNER IDENTITY

☐ PASSWORD REQUIRED TO SIGN

☐ KNOWLEDGE BASED AUTHENTICATION

☐ WEB IDENTITY AUTHENTICATION

☐ PASSWORD REQUIRED TO VIEW PDF

PASSWORD

CONFIRM PASSWORD

REMINDEE TO SIGN

Never

LANGUAGE *

English

☐ HOST SIGNING FOR THE FIRST SIGNER

DAYS UNTIL SIGNING DEADLINE

STATUS

Draft

DATE SENT

DATE SIGNED

CREATED BY

Rene Lawerson

DATE CREATED

12/1/2015 12:54 pm

MODIFIED BY

Rene Lawerson

LAST MODIFIED BY

12/1/2015 12:54 pm Rene Lawerson

PARENT RECORD

Acme Systems Incorporated

SIGNED DOCUMENT

SIGNED DOCUMENT URL

AUDIT TRAIL PDF

☐ NEED TO UPDATE

For Help [Click Here](#)

Documents Workflow Recipients

5. Specify the options for your agreement as follows:
 - **Agreement Name**—Enter a name for the agreement.
 - **Message**—Enter a custom message for the recipient.
 - **Signature Type**—Select the type of signature accepted for the document. The options are *e-Signature* and *Fax Signature*.
 - **I Also Need to Sign This Agreement**—Enable this option to indicate that the sender also needs to sign the agreement.
 - **Signature Order**—If the *I Also Need to Sign This Agreement* option is enabled, select the order in which the sender and recipients should sign. The options are "I sign, then recipients sign", "Recipients sign, then I sign" and "None".

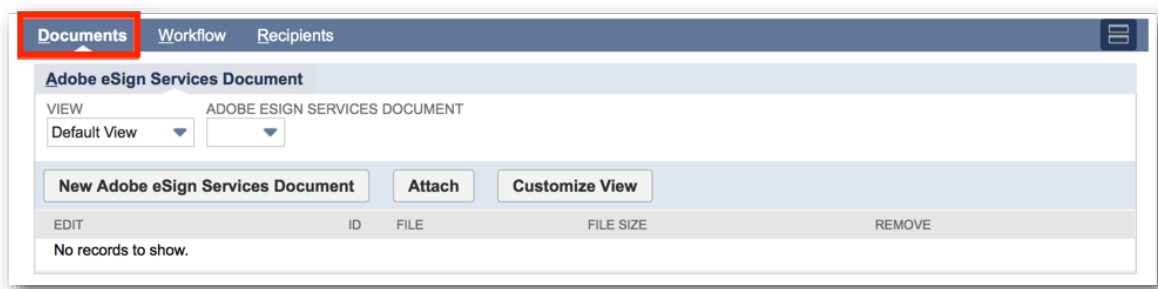
- **Preview Document or Position Signatures (or form fields)**—Enable this option to allow senders to preview the agreement and to allow them to add fields (drag and drop signature, initial fields, and other form fields) on to the agreement before it is sent to recipients.
- **Verify Signer Identity**—Enable this option then select one of the following identity verification options.

Note: This option display only when more than one of the three signer identity verification methods listed below is enabled in Custom Preferences. (See [Setting custom preferences for the first time](#) for more information.) If only one preference is enabled, the **Verify Signer Identity** option does not display.

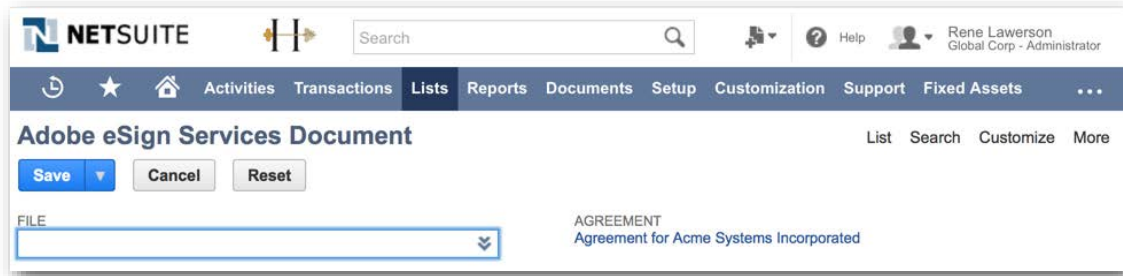
Identity Verification Methods

- **Password Required to Sign:** Require Signers to enter a one-time password you specify.
 - **Knowledge Based Authentication:** Require signers to provide their name, address and optionally the last 4 digits of their SSN and then answer a list of questions verifying the information they provided. Available only in the United States.
 - **Web Identity Authentication:** Require signers to verify their identity by signing in to one of the following sites: Facebook, Google, LinkedIn, Twitter, Yahoo! or Microsoft Live.
- **Password Required To View PDF**—Enable this option to require that a recipient enter a password before opening a PDF of the agreement or the signed agreement. The PDF file that is sent to everyone will be encrypted and this password will be required to open it. Don't lose your password as it is not recoverable. In the event that you do lose the password, you'll need to delete that transaction and begin again.
 - **Password/Confirm Password**—If the *Password Required To View PDF* option is enabled, enter the password that should be used to view the agreement.
 - **Remind Recipients to Sign**—Specify if and how often reminders are sent to recipients. The options are *Never*, *Daily* or *Weekly*.
 - **Language**—Specify the language in which the signing page and email notifications will be displayed to the recipients.
 - **Host Signing for the First Signer**—Enable this option to allow the sender host in-person signing for the first signer.
 - **Days Until Signing Deadline**—Enter a whole number to indicate the signing deadline for the agreement (Today's date + number of days).
 - **Parent Record**—Optionally, select a parent record to link it to the agreement.

6. Click the *Documents* tab.



- On the *Documents* sub-tab, attach an existing document from the file cabinet using the *Adobe eSign Services Document* drop-down and clicking **Attach**. Or, upload a new document by clicking on the **New Adobe eSign Services Document** button to access the *Adobe eSign Services Document* page (shown below) where you can type the name of a document in your NetSuite file cabinet, select files from your Transaction record (if applicable), or attach a new document. You can add multiple documents to an agreement.



The screenshot shows the NetSuite interface with the 'Adobe eSign Services Document' page. The top navigation bar includes 'Activities', 'Transactions', 'Lists', 'Reports', 'Documents', 'Setup', 'Customization', 'Support', and 'Fixed Assets'. The 'Documents' sub-tab is active. Below the navigation bar, there are buttons for 'Save', 'Cancel', and 'Reset'. A 'FILE' dropdown menu is visible, and the 'AGREEMENT' section shows 'Agreement for Acme Systems Incorporated'.

- Click the *Recipients* sub-tab to specify recipient by either selecting from the contact list or typing an email address.



The screenshot shows the 'Recipients' sub-tab in the NetSuite interface. It features a table with columns for 'SIGNER', 'EMAIL', and 'ROLE'. The 'SIGNER' column has a dropdown menu with the text '<Type then tab>'. The 'ROLE' column has the text 'Signer'. Below the table are buttons for 'Add', 'Cancel', 'Insert', and 'Remove'.

Each of your recipients can be marked as Signer or CC. If the *Allow Marking Recipients as Approvers Signers* custom preference is enable, recipients can also be marked as Approvers. (See [Setting custom preferences for the first time](#) for more information). Signers must sign the agreement. Approvers must approve, but not sign the agreement, and may optionally need to add data to an agreement. Recipients marked as CC are notified of agreement updates and when the agreement is signed and completed. These CC recipients are not a party to the signature or approval process. If the *Use Parent Record Contact as Signer* custom preference is enabled alone or in conjunction with the *Use Trans. Contact as Signer* preference, the first recipient is defaulted, but can be changed.

Click **Add** after entering each recipient.

- Click **Save** to save the agreement.

Sending agreements for signature

When the agreement is ready to be sent, click the **Send for Signature** button.

If the *Preview document or position signatures* option is enabled, clicking the **Send for Signature** button opens a pop-up window that allows the sender to preview the document or drag form fields on to the document before it is sent. Remember to click the **Send** button in that window to send the agreement to the recipient.

If the *Host Signing for First Signer* option is enabled, clicking the **Send for Signature** button opens a pop-up window to allow the signer to sign the document with the sender present.

Adobe Document Cloud eSign Services

A *Host Signing for Current Signer* link also appears next to the *Host Signing for First Signer* field, which can be accessed until the document is signed. Use this link to host agreement signing for multiple signers, or to reopen the pop-up window if it accidentally closed.

Once the agreement is sent, recipients receive an e-mail informing them of the documents awaiting their signature. After the recipients have signed the document, the sender receives a notification by e-mail that the document has been signed.

Sending from a quote

Adobe eSign services has a direct integration with Quotes in NetSuite so that a PDF of the quote is automatically generated and attached to the agreement record.

When viewing a Quote, click the **Send for Signature** button. The quote will be generated and automatically attached to the agreement. You can also add the *Send for Signature* button to other transaction record types. (See [Objects and record types](#) for more information.)

The screenshot shows the NetSuite interface for a Quote record. At the top, the quote number 'QUO00001007' and customer name 'Ashley Smoth' are displayed, along with an 'OPEN' button. Below this is a row of action buttons: 'Edit', 'Back', 'Sales Order', 'Cash Sale', 'Invoice', and 'Send For Signature'. The 'Send For Signature' button is highlighted with a red rectangular border. Underneath the buttons is a section titled 'Primary Information' containing fields for 'QUOTE #', 'DATE', 'CUSTOMER', 'SALES REP', 'JOB', and 'PARTNER'. The values are: QUOTE # QUO00001007, DATE 10/19/2015, CUSTOMER Ashley Smoth, SALES REP, JOB, and PARTNER. At the bottom, there are fields for 'SUBSIDIARY' (Honeycomb Mfg.) and 'LOCATION' (02: Boston).

Tracking status and sending reminders

After you send an agreement, the document status changes to *Out for Signature* in the Agreement details section.

The screenshot shows the NetSuite interface for an Adobe eSign Services Agreement record. The top navigation bar includes the NetSuite logo, a search bar, and user information for Rene Lawerson, Global Corp - Administrator. The main navigation bar contains links for Activities, Transactions, Lists, Reports, Documents, Setup, Customization, Support, and Fixed Assets. The record title is 'Adobe eSign Services Agreement' with a sub-title 'Agreement for Acme Systems Incorporated'. Below the title is a row of action buttons: 'Edit', 'Back', 'Update Status', 'Cancel Agreement', 'Send Reminder', and 'Actions'. The 'Update Status' button is highlighted. At the bottom, there are three fields: 'AGREEMENT NAME' (Agreement for Acme Systems Incorporated), 'SIGNATURE TYPE' (e-Signature), and 'STATUS' (Out For Signature).

The **Send for Signature** button is replaced by the **Update Status**, **Cancel Agreement**, and **Send Reminder** buttons, which function as follows:

- **Update Status**—Click this button to manually update the status if status updates have not been configured. (See [Configuring automatic status updates](#) for more information.)
- **Send Reminder**—Click this button to send a reminder to the current signer.
- **Cancel Agreement**—Click this button to cancel an agreement. An agreement may be canceled after it has been sent for a signature if all recipients have not yet signed.

A new *Events* sub-tab displays in the agreement record where you can track the agreement's status. You can see a history of the agreement events, which includes information about when the agreement was sent, viewed, and signed.

The screenshot displays the Adobe eSign Services Agreement page within the NetSuite interface. The page title is "Adobe eSign Services Agreement" and the specific agreement is "Agreement for Acme Systems Incorporated". The user is Rene Lawerson, Global Corp - Administrator.

The page features several buttons: **Edit**, **Back**, **Update Status**, **Cancel Agreement**, and **Send Reminder**. There is also an **Actions** dropdown menu.

The agreement details are organized into three columns:

- AGREEMENT NAME:** Agreement for Acme Systems Incorporated
- MESSAGE:** Kristina, Please sign this agreement. Thanks.
- SIGNATURE TYPE:** e-Signature
- SIGNATURE ORDER:** -NONE-
- STATUS:** Out For Signature
- DATE SENT:** 12/2/2015
- DATE SIGNED:**
- CREATED BY:** Rene Lawerson
- DATE CREATED:** 12/2/2015 10:48 am
- MODIFIED BY:** Rene Lawerson
- LAST MODIFIED BY:** 12/2/2015 11:48 am -System-
- PARENT RECORD:** Acme Systems Incorporated
- SIGNED DOCUMENT:**
- SIGNED DOCUMENT URL:**
- AUDIT TRAIL PDF:**

At the bottom, there is a tabbed interface with **Documents**, **Workflow**, **Recipients**, and **Events**. The **Events** tab is currently selected and highlighted with a red box. It shows a table with the following data:

EVENT DESCRIPTION	EVENT DATE TIME
Sent out for signature to kmaggestein@gmail.com	12/2/2015 11:48:19 am

Adobe Document Cloud eSign Services

After the agreement is signed, its Status changes to *Signed*. You can easily link back to the Parent Record for this agreement using the link. You can also use the “download” links under Signed Document and Audit Trail to access these documents. After the agreement is signed, an additional *Signed Document* sub-tab also displays. You can use this sub-tab to view image thumbnails of the signed document.

Adobe eSign Services Agreement

Agreement for Acme Systems Incorporated

[Edit](#) [Back](#) [Print](#) [Actions](#)

AGREEMENT NAME
Agreement for Acme Systems Incorporated

MESSAGE
Kristina,
Please sign this agreement.
Thanks.

SIGNATURE TYPE
e-Signature

☐ I ALSO NEED TO SIGN THIS AGREEMENT

SIGNATURE ORDER
-NONE-

☒ PREVIEW DOCUMENT OR POSITION SIGNATURES

☐ VERIFY SIGNER IDENTITY

PASSWORD REQUIRED TO SIGN

WEB IDENTITY AUTHENTICATION

☐ PASSWORD REQUIRED TO VIEW PDF

PASSWORD
hidden

CONFIRM PASSWORD
hidden

RECORD RECIPIENTS TO SIGN
Never

LANGUAGE
English

☐ HOST SIGNING FOR THE FIRST SIGNER

DAYS UNTIL SIGNING DEADLINE

STATUS
Signed

DATE SENT
12/2/2015

DATE SIGNED
12/2/2015

CREATED BY
Rene Lawerson

DATE CREATED
12/2/2015 10:48 am

MODIFIED BY
Rene Lawerson

LAST MODIFIED BY
12/2/2015 12:37 pm -System-

PARENT RECORD
[Acme Systems Incorporated](#)

SIGNED DOCUMENT
[preview Agreement for Acme Systems Incorporated \(2015-12-2 12:37:6\).pdf](#) [download](#)

SIGNED DOCUMENT URL

AUDIT TRAIL PDF
[preview Agreement for Acme Systems Incorporated-AuditTrail.pdf](#) [download](#)
For Help [Click Here](#)

☐ NEED TO UPDATE

PARENT TRANSACTION

[Documents](#) [Workflow](#) [Recipients](#) [Events](#) [Signed Document](#)

globalcorp

Non-Disclosure Agreement

Note: After an agreement has been sent for signature, you will not be able to edit the record. This is to preserve the record of events.

Uninstalling the Bundle

To uninstall the bundle, follow the steps provided in the NetSuite Help. (See the *Uninstalling a Bundle* topic in the NetSuite Help Center for more information.)

Please note that if you uninstall the bundle, unsigned agreements will be deleted. Signed agreements and their corresponding audit PDF files will not be affected. Do NOT uninstall the bundle if you need to retain your unsigned agreements.

Troubleshooting

Determining the progress of the update

If the update to 4.0 appears to be taking longer than, you can check the Execution Log sub-tab for the Adobe eSign Services Bundle Installation script to determine the progress of your update as follows:

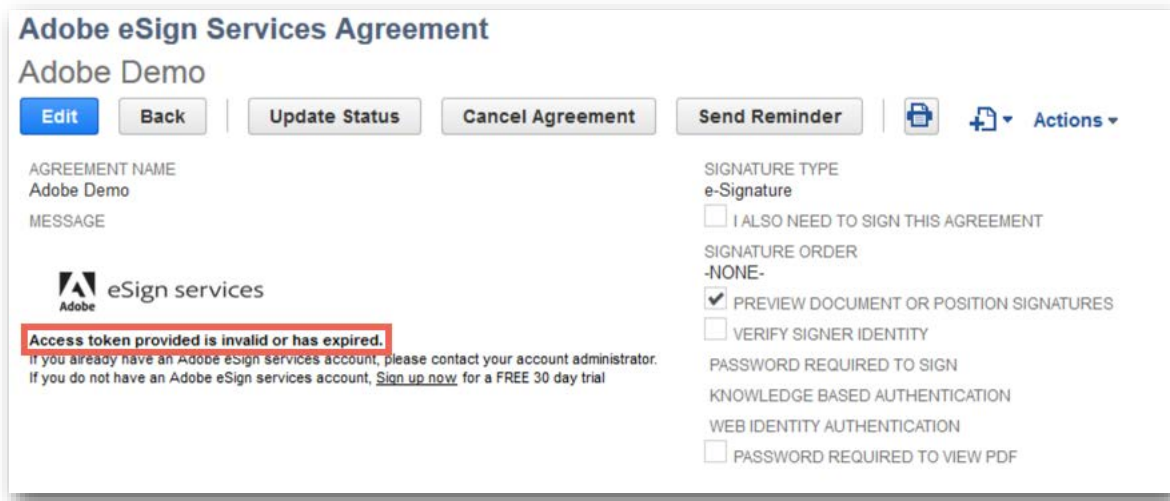
1. Navigate to **Customization > Scripting > Scripts**.
2. On the *Scripts* page, locate the *Adobe eSign Services Bundle Installation* script then click **Edit**.
3. On the *Script* page, click to select the *Execution Log* sub-tab.
4. Click **Refresh**. The Execution Log updates to reflect the current status. The *Details* column displays the progress of the updates to your agreements.

The screenshot shows the NetSuite interface with the **Customization > Scripting > Scripts** path. The selected script is **Adobe eSign Services Bundle Installation**. The **Execution Log** sub-tab is active, displaying a table of log entries. The table has columns for **VIEW**, **TYPE**, **TITLE**, **DATE**, **TIME**, **USER**, **DETAILS**, and **REMOVE**. The log entries show the progress of the update, including the total number of agreements updated, the status of individual agreements, and the completion of the update process.

VIEW	TYPE	TITLE	DATE	TIME	USER	DETAILS	REMOVE
View	Debug	Total eSign Services Agreements updated so far	12/14/2015	10:53 pm	Rene Lawerson	2 out of 5 are updated	Remove
View	Debug	eSign Service Agreement id 5 is updated	12/14/2015	10:53 pm	Rene Lawerson		Remove
View	Debug	Total eSign Services Agreements updated so far	12/14/2015	10:53 pm	Rene Lawerson	1 out of 5 are updated	Remove
View	Debug	eSign Service Agreement id 1 is updated	12/14/2015	10:53 pm	Rene Lawerson		Remove
View	Debug	SOAP Action	12/14/2015	10:53 pm	Rene Lawerson	getBaseUri	Remove
View	Debug	Total eSign Services Agreements to update	12/14/2015	10:53 pm	Rene Lawerson	Count = 5	Remove
View	Debug	Start Upgrade	12/14/2015	10:53 pm	Rene Lawerson		Remove
View	Debug	In afterUpdate from version 3.5.9 to version 4.0.0	12/14/2015	10:53 pm	Rene Lawerson		Remove

Resolving access token issues

Users may encounter an "Access token provided is invalid or has expired" message when interacting with agreements.



The screenshot shows the 'Adobe eSign Services Agreement' page for 'Adobe Demo'. It features a top navigation bar with buttons: 'Edit', 'Back', 'Update Status', 'Cancel Agreement', 'Send Reminder', and an 'Actions' dropdown. The main content area is divided into two columns. The left column contains 'AGREEMENT NAME: Adobe Demo' and 'MESSAGE' with the Adobe eSign services logo. A red box highlights an error message: 'Access token provided is invalid or has expired.' Below this, it says: 'If you already have an Adobe eSign services account, please contact your account administrator. If you do not have an Adobe eSign services account, [Sign up now](#) for a FREE 30 day trial'. The right column contains configuration options: 'SIGNATURE TYPE: e-Signature' with a checkbox 'I ALSO NEED TO SIGN THIS AGREEMENT'; 'SIGNATURE ORDER: -NONE-' with a checked checkbox 'PREVIEW DOCUMENT OR POSITION SIGNATURES' and an unchecked 'VERIFY SIGNER IDENTITY'; and authentication options: 'PASSWORD REQUIRED TO SIGN', 'KNOWLEDGE BASED AUTHENTICATION', 'WEB IDENTITY AUTHENTICATION', and 'PASSWORD REQUIRED TO VIEW PDF' (unchecked).

This may occur for the following reasons:

- The NetSuite/eSign services administrator who configured OAuth has revoked the access token.
- The access token has expired because no agreements have been sent from NetSuite in the past 60 days.
- The NetSuite/eSign services administrator does not successfully complete the initial OAuth configuration.

You can easily resolve this issue by executing the OAuth configuration process again. See [Configuring OAuth after installing or upgrading](#) for more information.

Resolving document status issues

If [automatic status updates](#) have been configured, but agreement status is not updating after sending agreements, try the following:

1. Check the deployment execution log for the *Adobe eSign Services External Update* script to see if you are receiving calls from Adobe eSign services as follows:
 - a) Navigate to **Customization > Scripting > Script Deployments**.
 - b) On the *Script Deployments* page, locate the *Adobe eSign Services External Update* script, then click **Edit**.
 - c) On the *Script Deployment* page, click to select the **Execution Log** sub-tab. You should see an *Updated Agreement Record* entry for each agreement ID.
2. Check the deployment execution log for the *Adobe eSign Services Update Agreements* script to see if there are any errors as follows:
 - a) Navigate to **Customization > Scripting > Script Deployments**.
 - b) On the *Script Deployments* page, locate the *Adobe eSign Services Update Agreements* script with the "Scheduled" status, then click **Edit**.

- c) On the *Script Deployment* page, click to select the **Execution Log** sub-tab.
- d) Under *Type*, select "Error" to filter the results.
3. Lastly, check the execution log for the *Adobe eSign Services Service Manager* script for errors by following the instructions in step 2 above.

Resolving MIME type errors

If you are receiving a MIME type error when attempting to send an agreement, this may be because the name in the File Name field does not match the filename and extension of the uploaded file. If you leave the File Name field blank, it will automatically be populated with the correct filename and extension.

Viewing script logs

You can also view the deployment execution logs for scripts that are not related to document status issues. (See [Resolving document status issues](#) for more information.)

1. Navigate to **Customization > Scripting > Scripts**. The *Scripts* list page displays. If necessary, use the filters to locate the appropriate script.
2. Select **View** for the corresponding script.
3. Click to select the **Execution Log** sub-tab on the page to display the script log.

Support

Go to the Adobe Support portal to access FAQs, documentation, knowledge base articles, and contact Adobe Support: <https://www.echosign.adobe.com/en/support.html>.