Adobe Document Cloud eSign Services

NetSuite Integration v4 Installation and Customization Guide

Last Updated: February 3, 2016

Table of Contents

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.

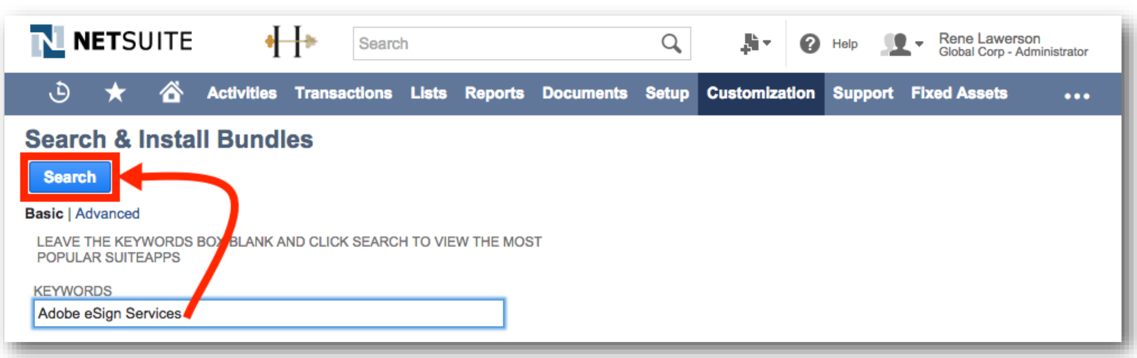
Installing the bundle and configuring OAuth

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.

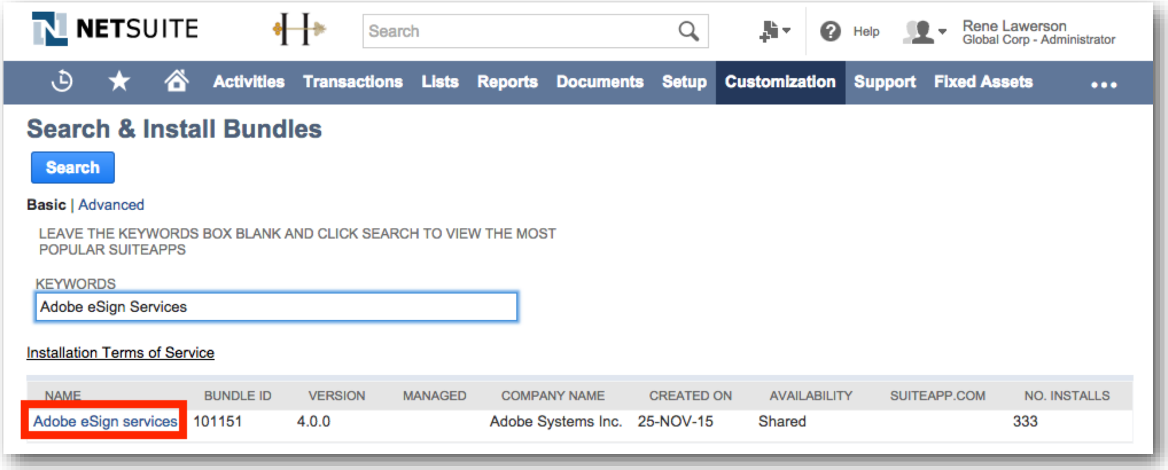
Note: Customers upgrading from v3.5.9 to v4.0 should NOT remove their existing API key. See Setting custom preferences (existing users) for more information on how the API key is used.

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**.

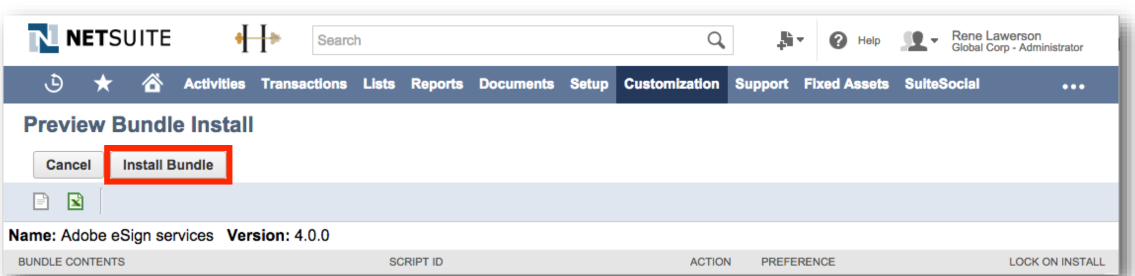


3. Click the **Adobe eSign services** bundle name.

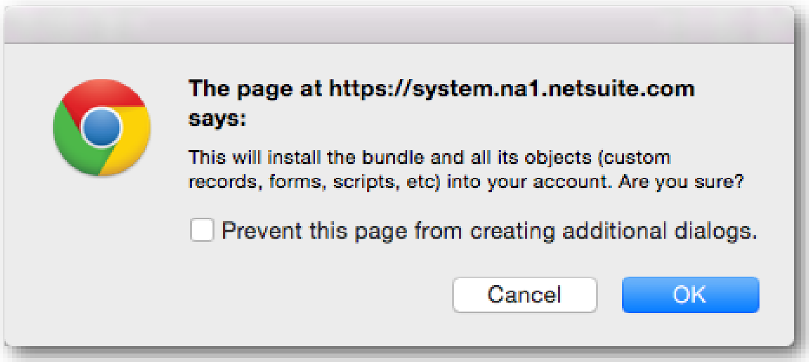


4. On the *Bundle Details* page, click **Install**.

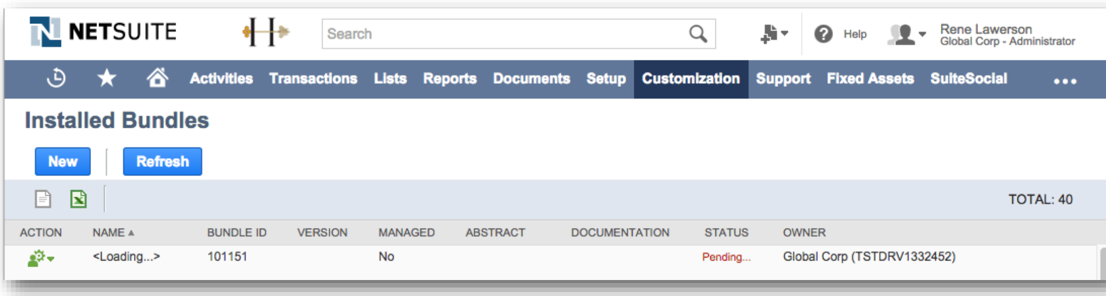
5. In the *Preview Bundle Install* page, click **Install Bundle**. There is no need to change any of the default values on the page.



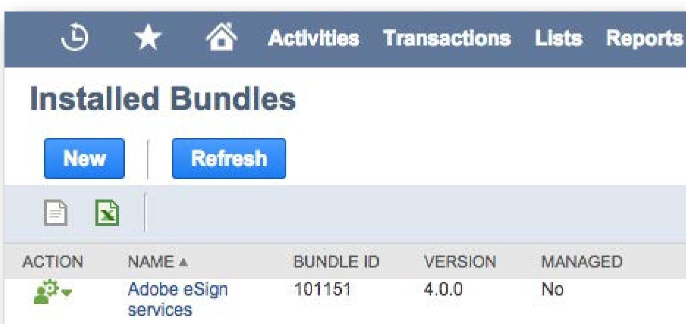
6. When the install dialog displays, click **OK** to proceed.



7. 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.



8. 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

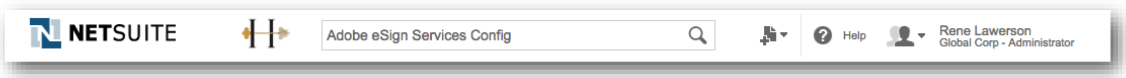
   Follow the online registration steps to enable your Adobe eSign services account.

Configuring OAuth after installing or upgrading

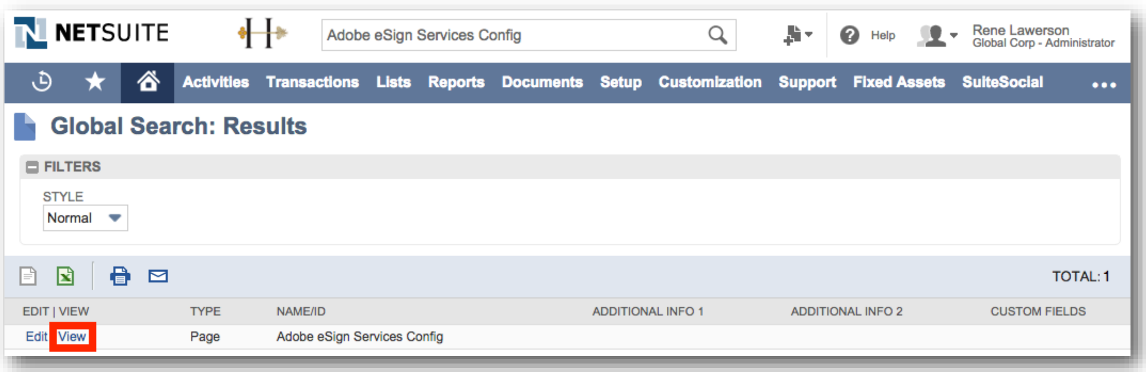
To improve data security, eSign services now uses OAuth 2.0 to authenticate your eSign services account within NetSuite. This new protocol allows NetSuite to communicate with eSign services without requesting your eSign services password. Since sensitive information is not being shared directly between 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.

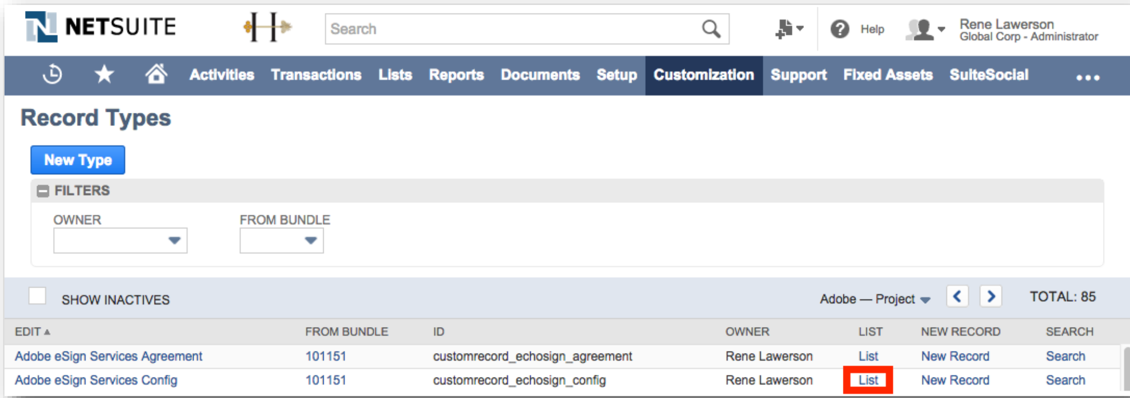
1. In NetSuite, do one of the following to navigate to the *Adobe eSign Services Config* list page:
    - Use the *NetSuite Global Search* field in the header to search for the "Adobe eSign Services Config" custom record type.



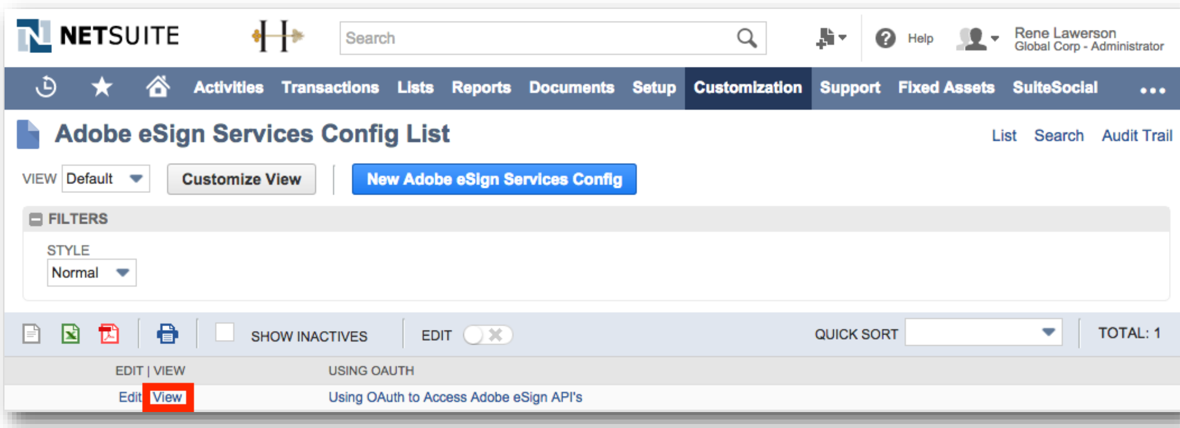
In the *Search Results* page, click **View** for the *Adobe eSign Services Config* record type row.



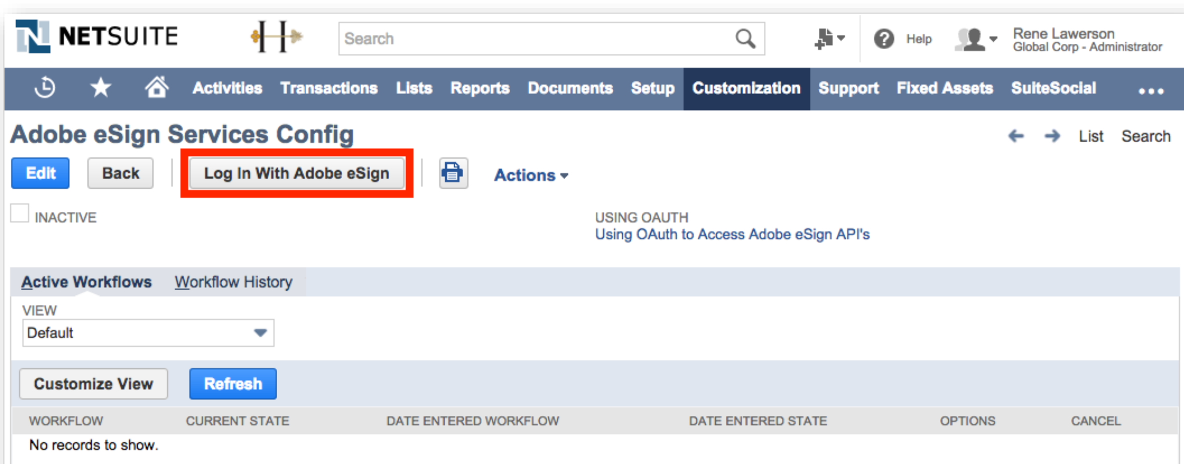
- Navigate to **Customization > Lists, Records, & Files > Records Types**. Locate the *Adobe eSign Services Config* record type, then click **List**.



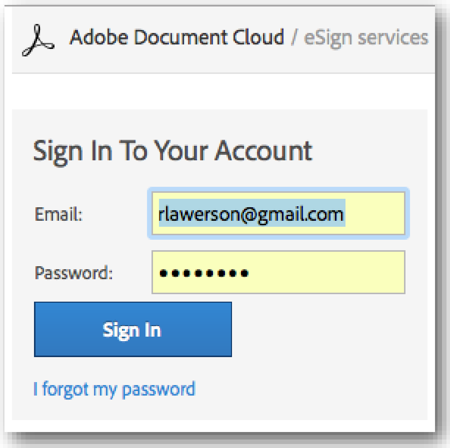
2. On the *Adobe eSign Services Config List* page, click **View** to the left of *Using OAuth to Access Adobe eSign APIs*.



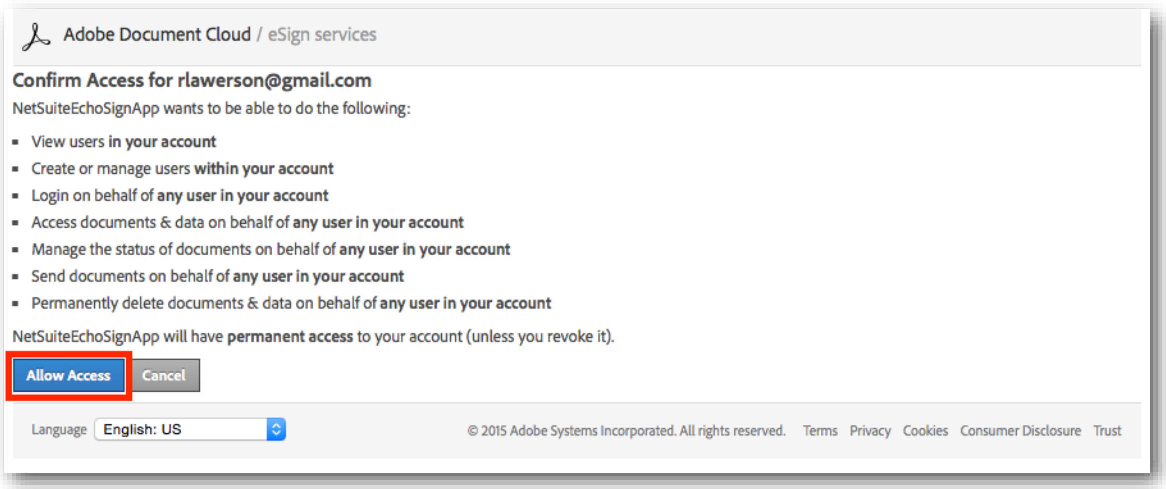
3. In the *Adobe eSign Services Config* page, click **Login In With Adobe eSign**.



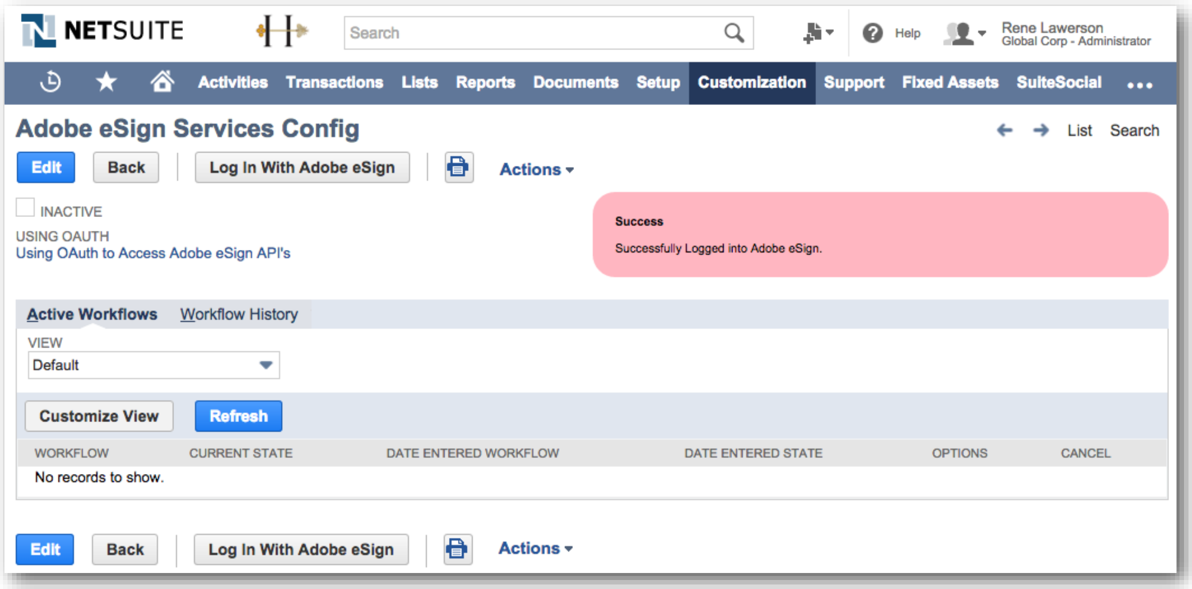
4. When the *Adobe Document Cloud / eSign services* login page displays, enter your credentials.



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



6. 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.

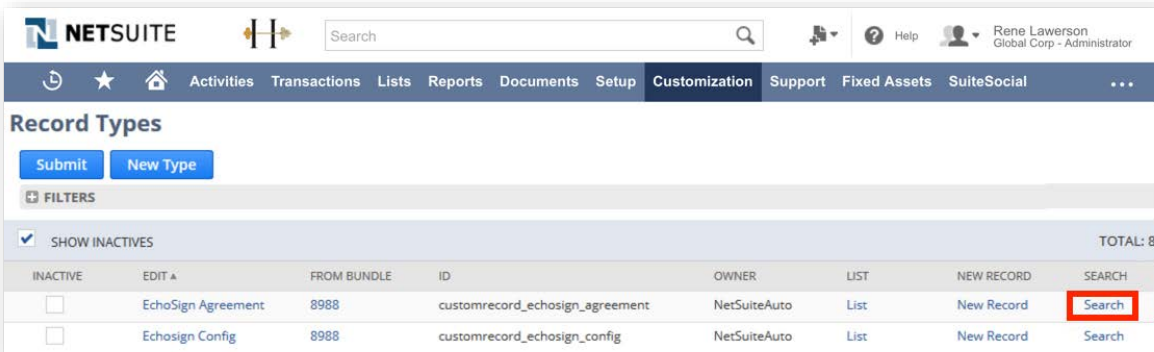
Note: Customers upgrading from v3.5.9 to v4.0 should NOT remove their existing API key. See Setting custom preferences (existing users) for more information on how the API key is used.

Before updating the bundle

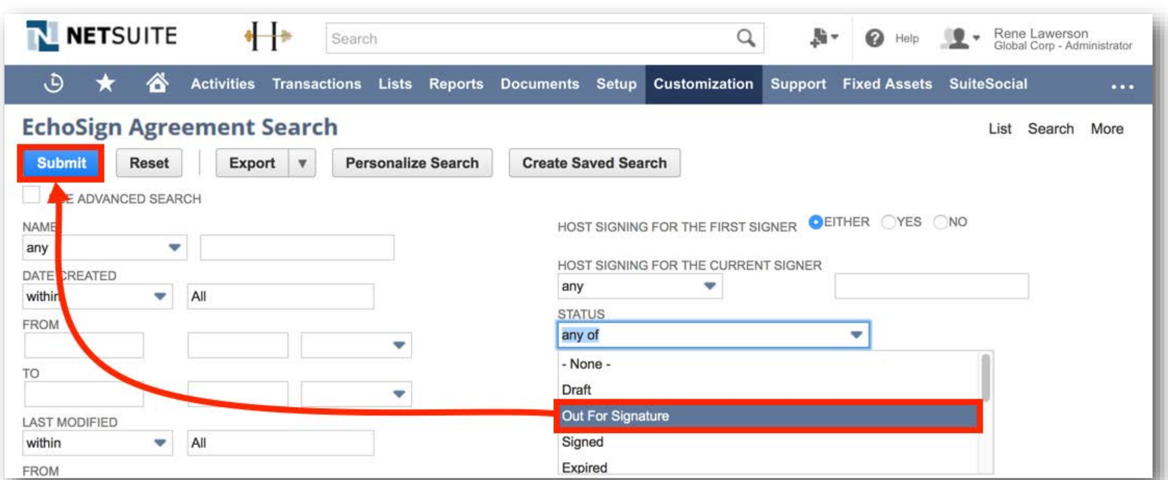
The amount of time required for to update to the v4 bundle depends on the number of agreements that currently have a status of *Out for Signature*. Under normal circumstances, it takes 7 to 10 minutes to update 100 agreements. To determine how many *Out for Signature* agreements you have, do the following:

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

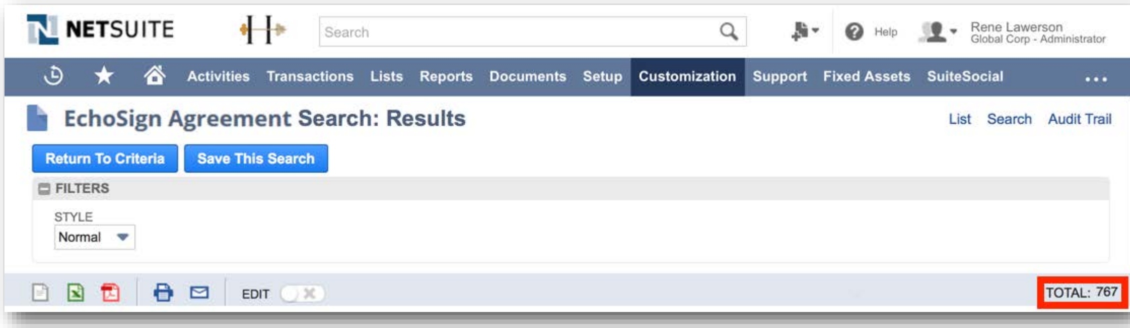
2. Click the **Search** link to the right.



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

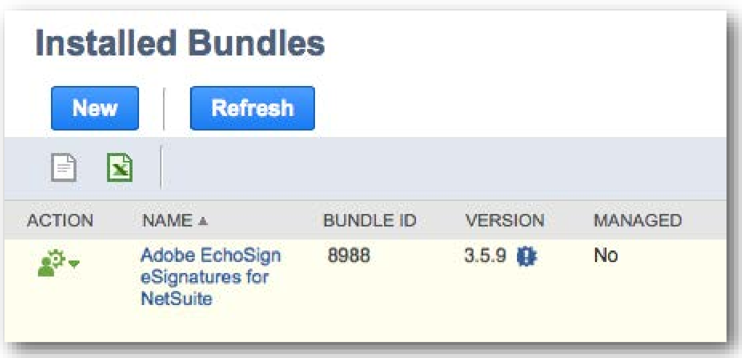


Note the number of records to estimate your update time.



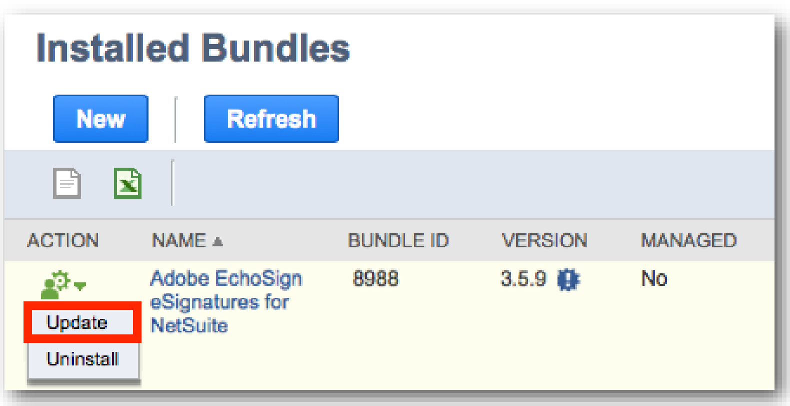
Updating the bundle

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

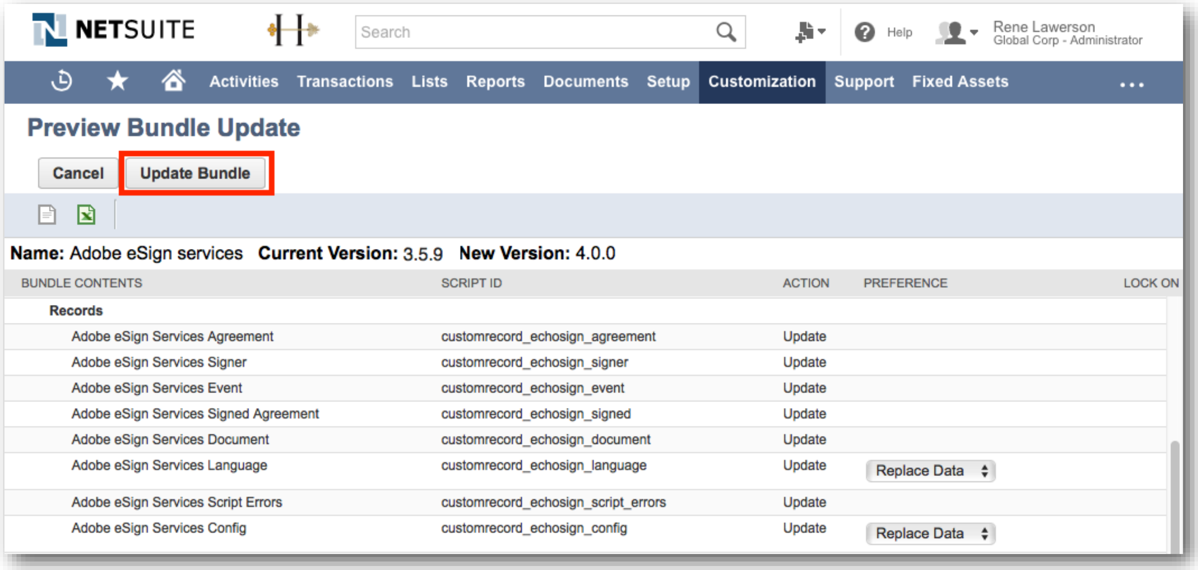


Note: If there is a new version of the bundle, an exclamation point icon displays to the right of the *Version* number of your current bundle.

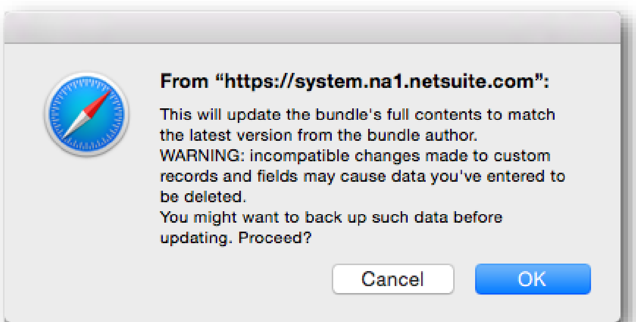
2. From the *Action* drop-down menu, select **Update**.



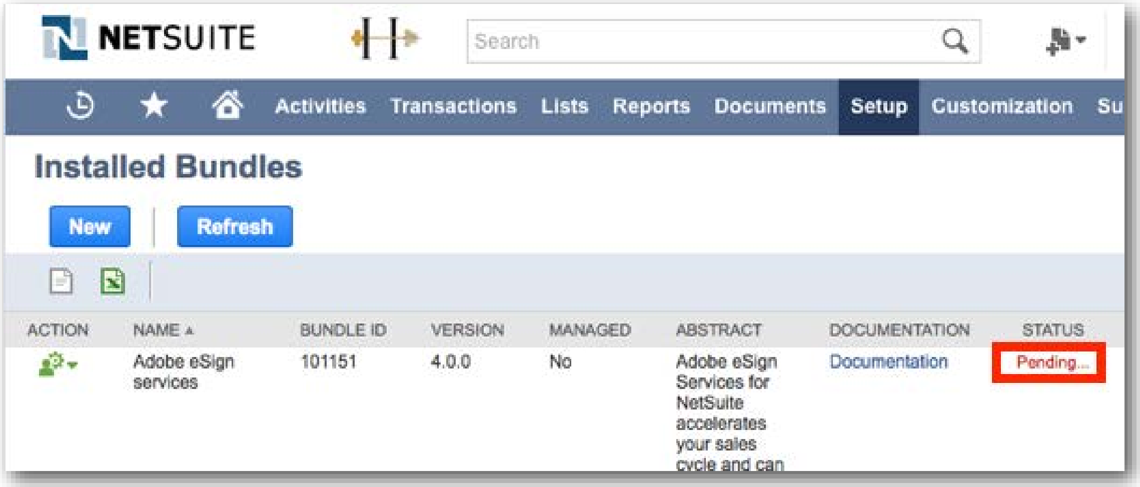
3. On the *Preview Bundle Update* page, click **Update Bundle** without changing any of the default values displayed on the page.



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.

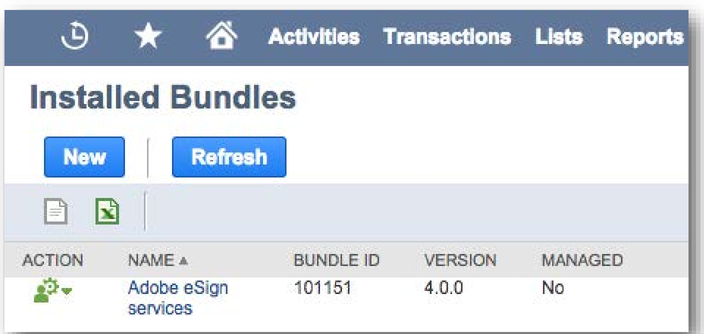


4. During the update installation process, the status of the bundle displays as *Pending*. To display an updated status, click **Refresh**.



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.



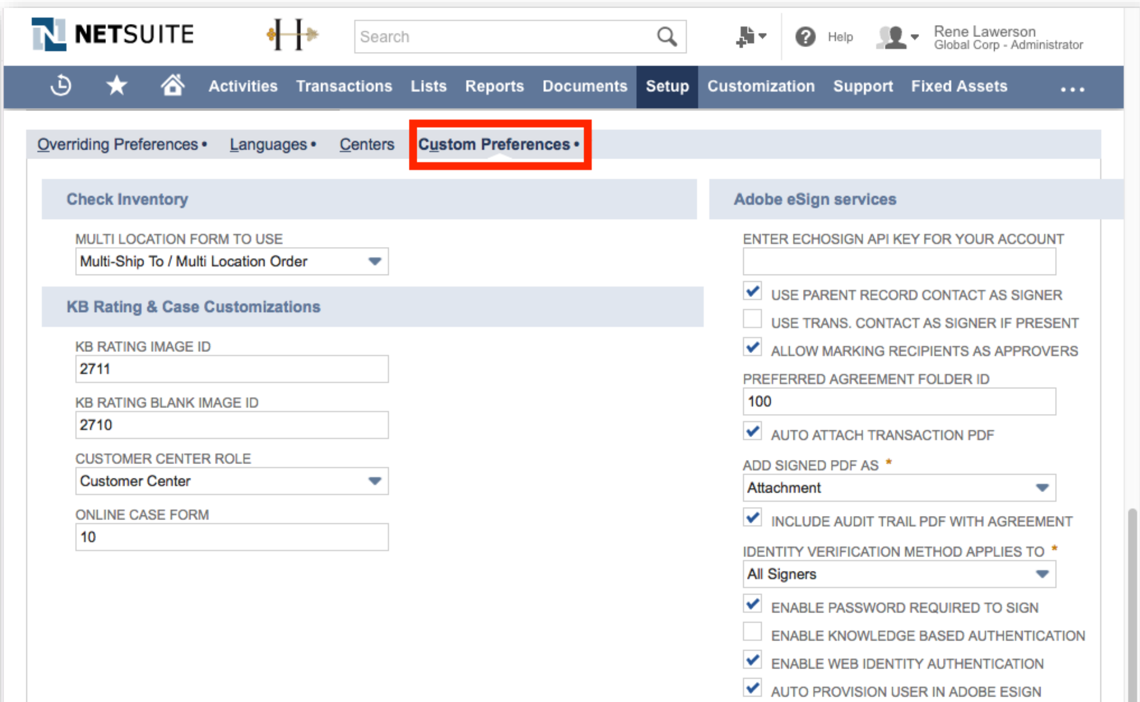
Configuring the bundle

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.



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.)

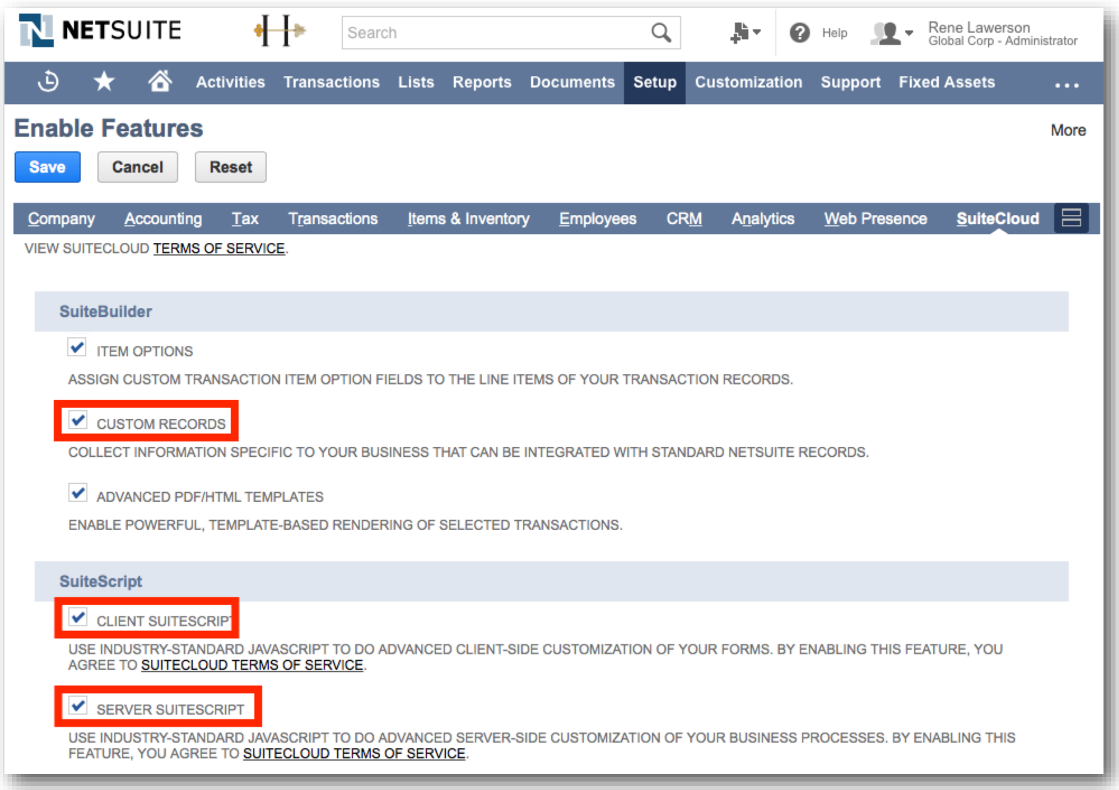
Note: The API key that was used by previous versions of the bundle displays in the **Enter EchoSign API Key for Your Account** field at the top of Custom Preferences. When updating, the API key is required to transition existing agreements created using the API key to the new OAuth model. The API key is only required for customers updating form 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.

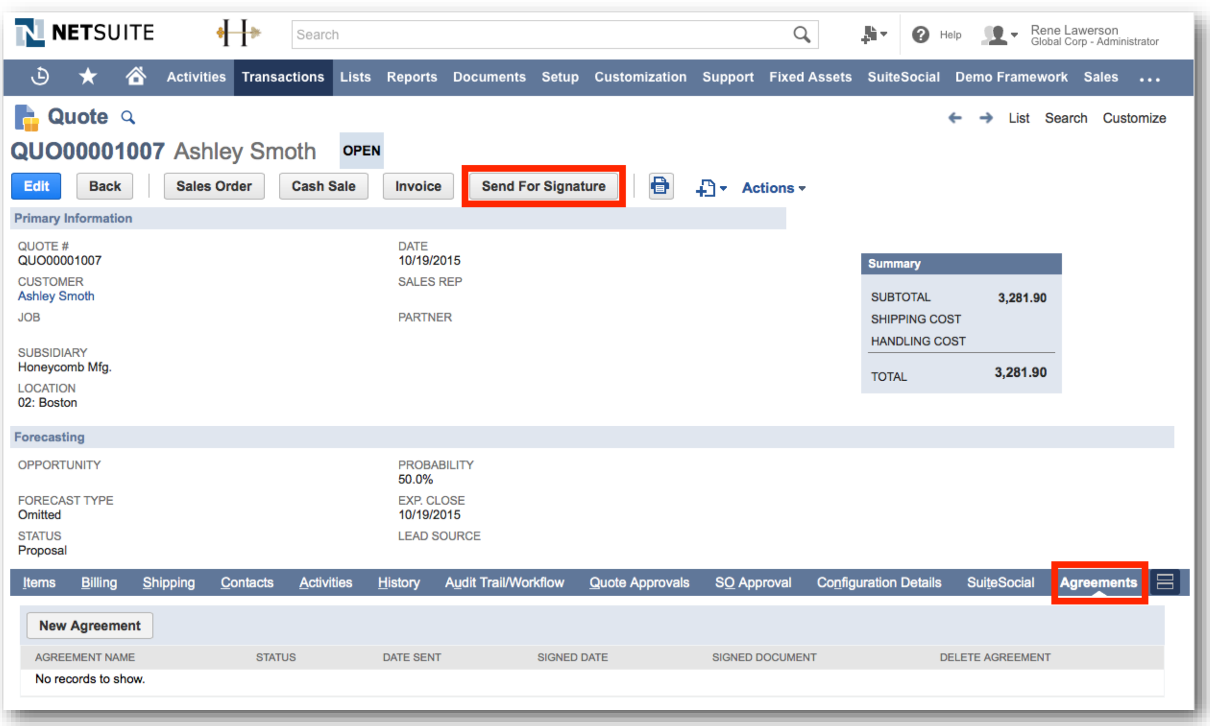
The Agreement tab can appear with two types of NetSuite records: *Entity* and *Transaction* records. For our purpose we can usually assume that a *Transaction* record is a record that can be converted into a PDF document— e.g., a Quote—whereas an *Entity* record cannot.

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.



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

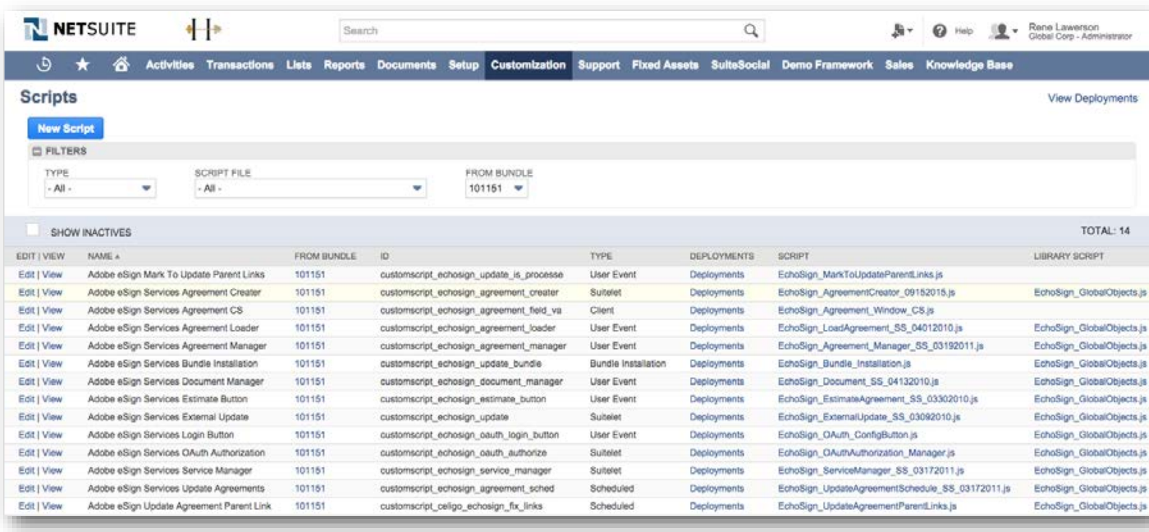
Customizing the bundle includes the following:

- 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

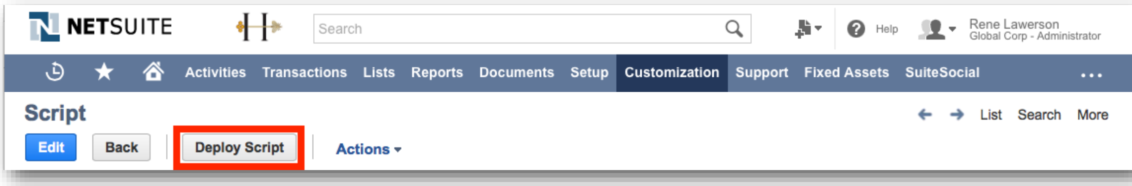
To deploy the *Agreements* sub-tab and the *Send for Signature* button for the appropriate record types, follow the steps below.

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



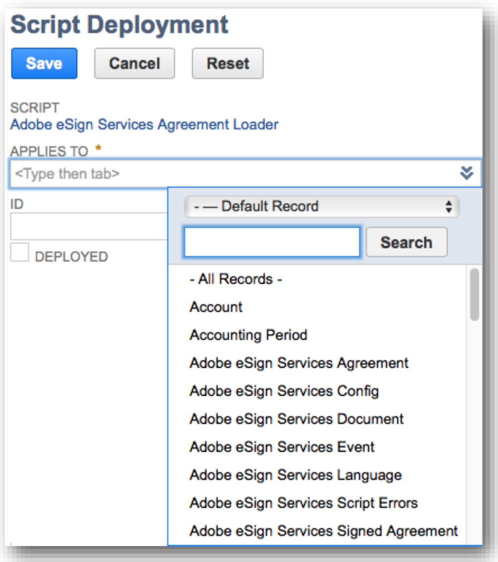
2. On the *Scripts* list page, locate the script you need to deploy, then click **View**.
   - To add the **Send for Signature** button, select the *Adobe eSign Services Estimate Button* script.
   - To add the **Agreements** tab, select the *Adobe eSign Services Agreement Loader* script.

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



4. On the *Script Deployment* page, do the following:

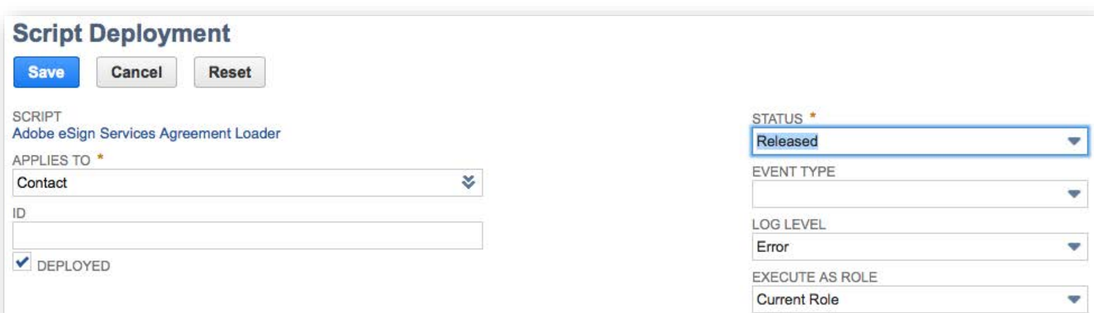
   a) From the *Applies To* list, select the type of record.



   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**.

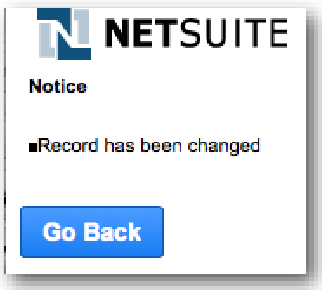


Note: You do not need to specify an *Event Type* or *Log Level*.

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.

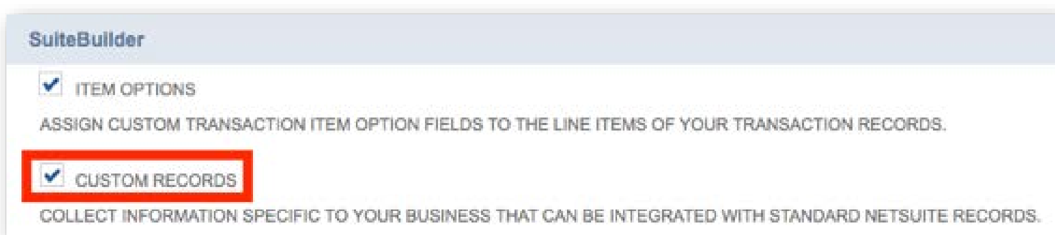
6. Repeat steps 2 and 3 above for the other script.

Setting role permissions for Adobe eSign services record types

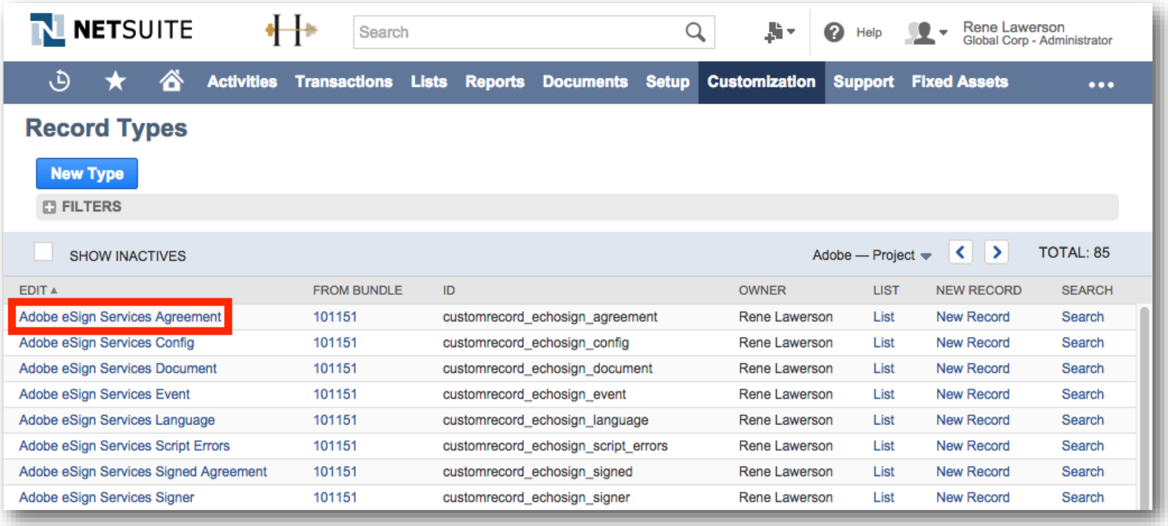
Most NetSuite roles should have permission to use Adobe eSign services without additional customization. However, you may need to grant permissions for any additional custom roles that have been created.

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

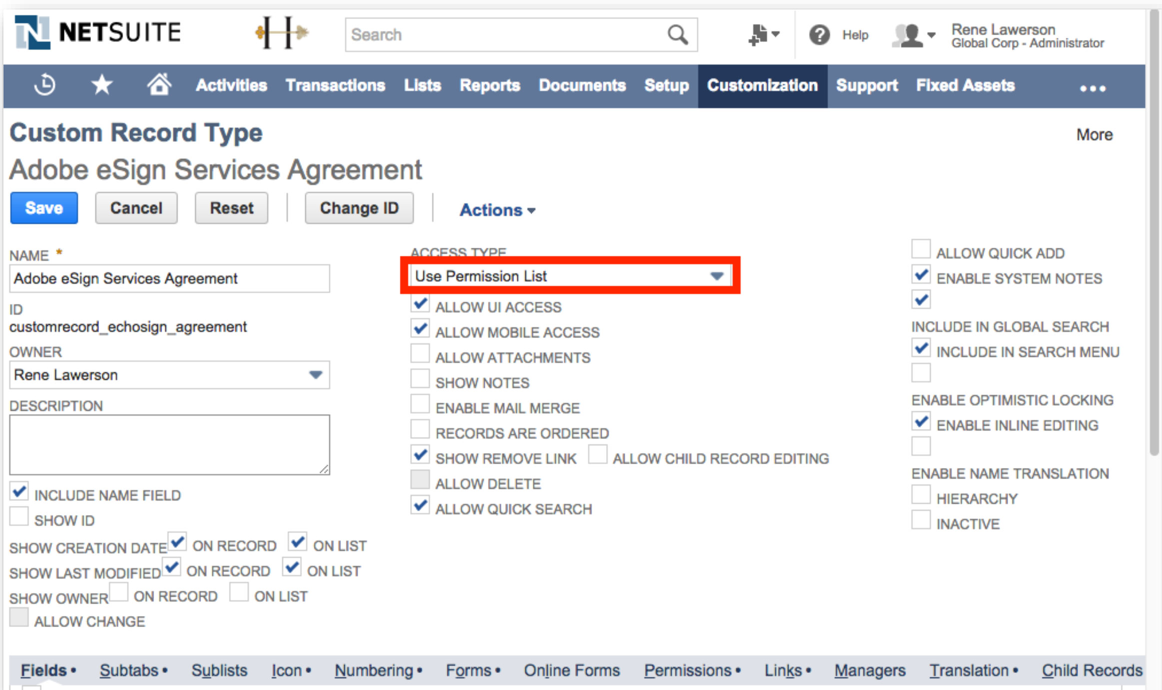
Note: If you do not see the *Record Types* item, navigate to **Setup** > **Company** > **Enable Features** > **Suite Cloud tab** and enable the *Custom Records* option.



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

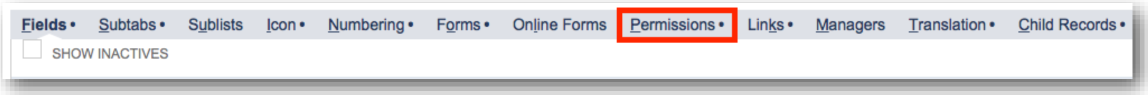


3. On the *Custom Record Type* page, select **Use Permission List** from the *Access Type* drop-down.

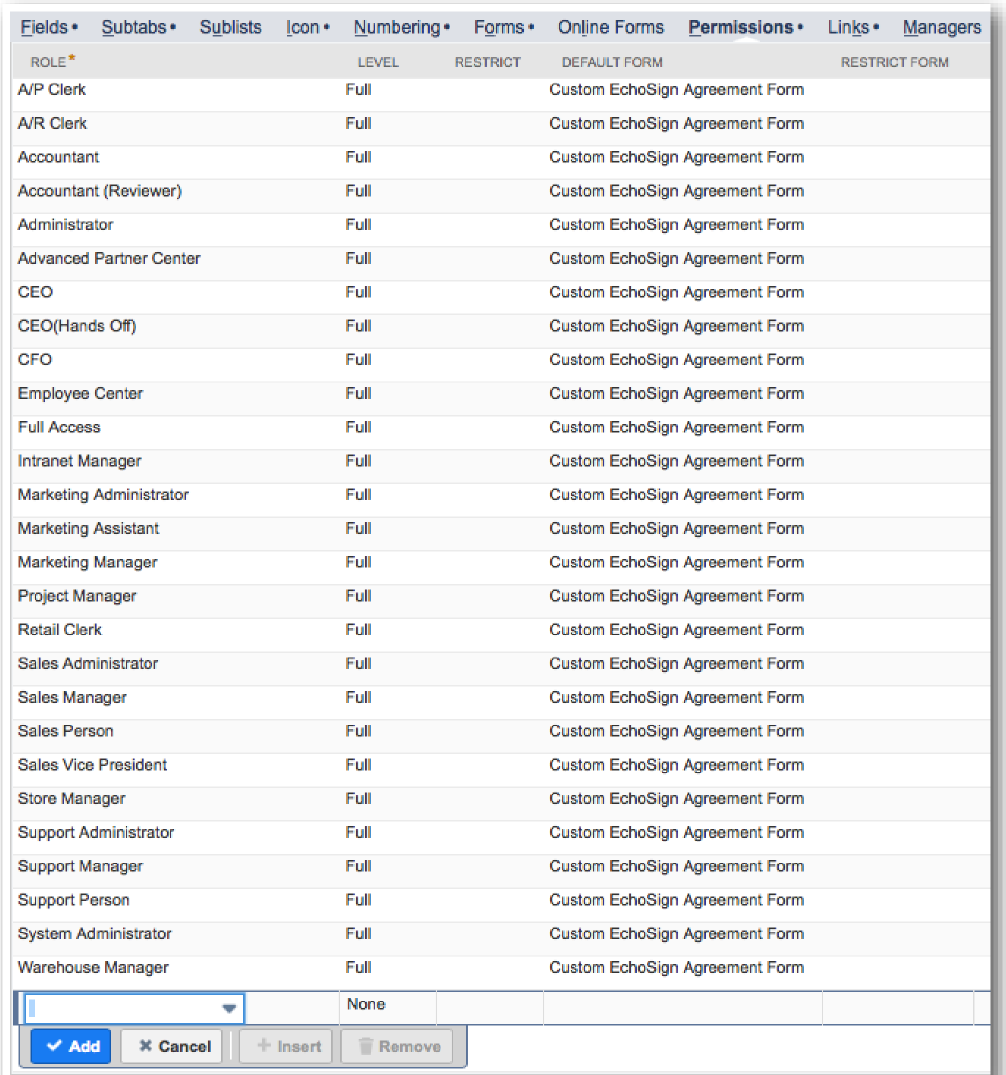


Note: The *Adobe eSign Services Agreement* record type is the only Adobe eSign services record type that required the Uses Permission List access type. See step 6 for instructions on setting the access type for the other Adobe eSign services record types.

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



The list of roles and permissions displays.

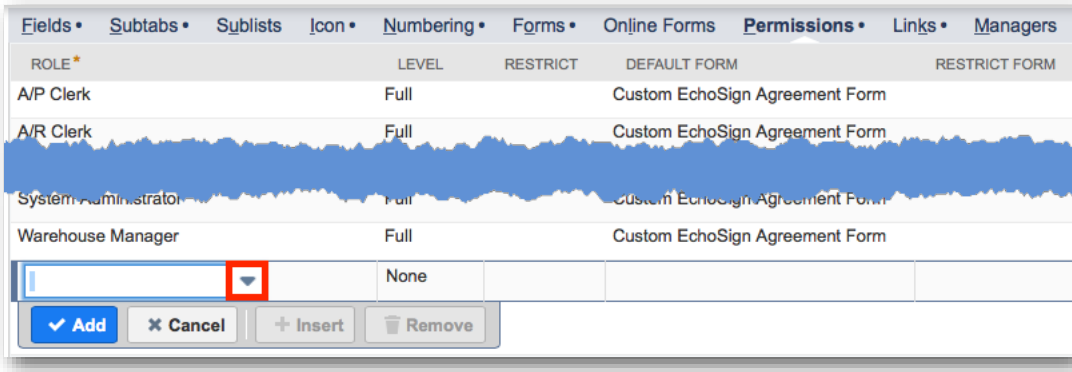


ROLE*	LEVEL	RESTRICT	DEFAULT FORM	RESTRICT FORM
A/P Clerk	Full		Custom EchoSign Agreement Form	
A/R Clerk	Full		Custom EchoSign Agreement Form	
Accountant	Full		Custom EchoSign Agreement Form	
Accountant (Reviewer)	Full		Custom EchoSign Agreement Form	
Administrator	Full		Custom EchoSign Agreement Form	
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	
	None			

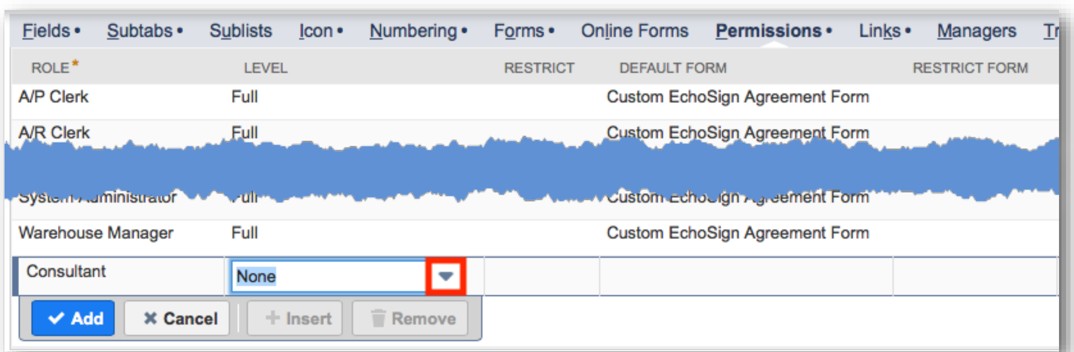
5. Set permissions as follows for the additional custom roles added to the “Adobe eSign Services Agreement” record type.

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

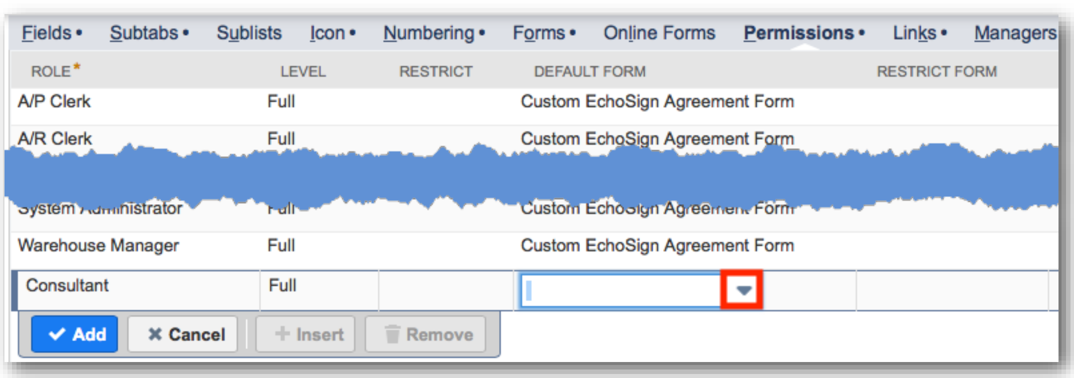
   a) Select the role from the *Role* list.



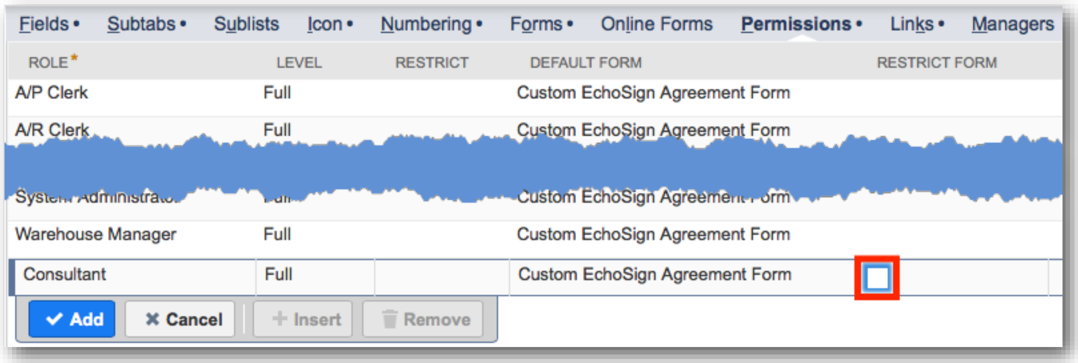
   b) Set *Level* to **Full**.



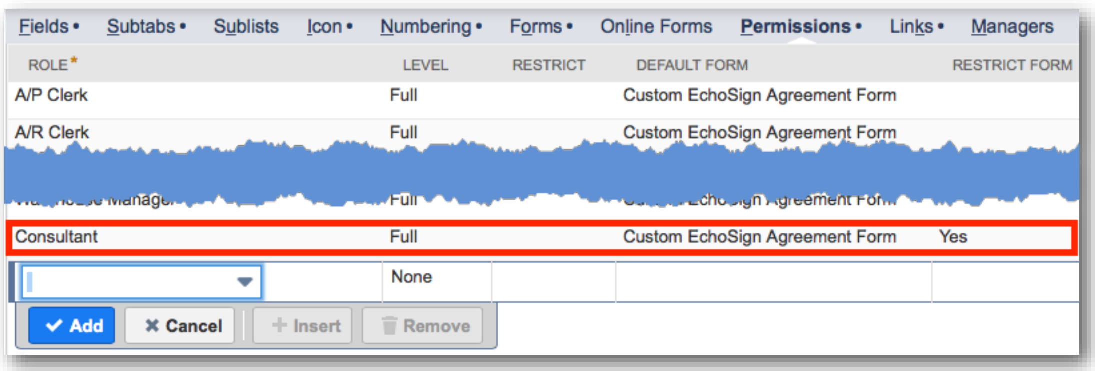
   c) Set *Default Form* to **Custom EchoSign Agreement Form**.



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



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



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 redisplays.

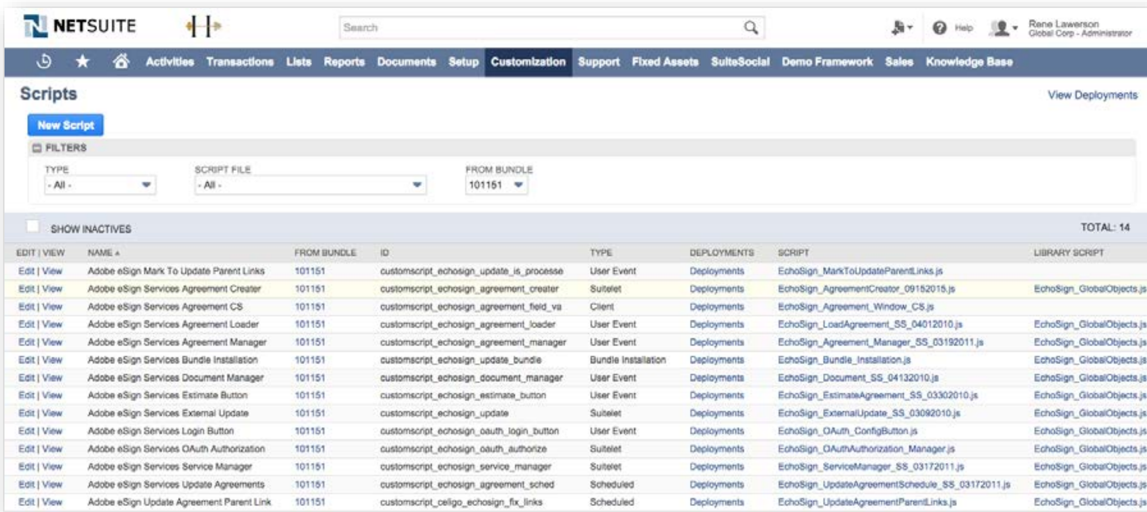
6. Repeat steps 1 to 3 above to set the *Access Type* for all the other Adobe eSign Services record types to **No Permission Required.** This applies to following record types:
   - Adobe eSign Services Config
   - Adobe eSign Services Document
   - Adobe eSign Services Event
   - Adobe eSign Services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

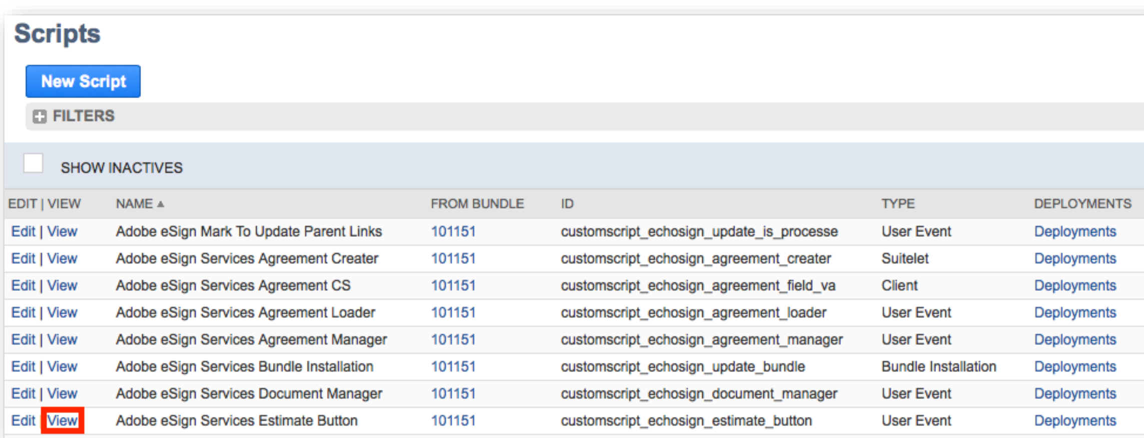
As previously mentioned, the Adobe eSign services integration bundle already exposes the Adobe eSign Services Agreement object with many standard NetSuite objects (Customer, Estimate [Quote], Lead, etc.). The *Agreement* sub-tab is automatically enabled for the following types of objects: Customer, Lead, 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**.**

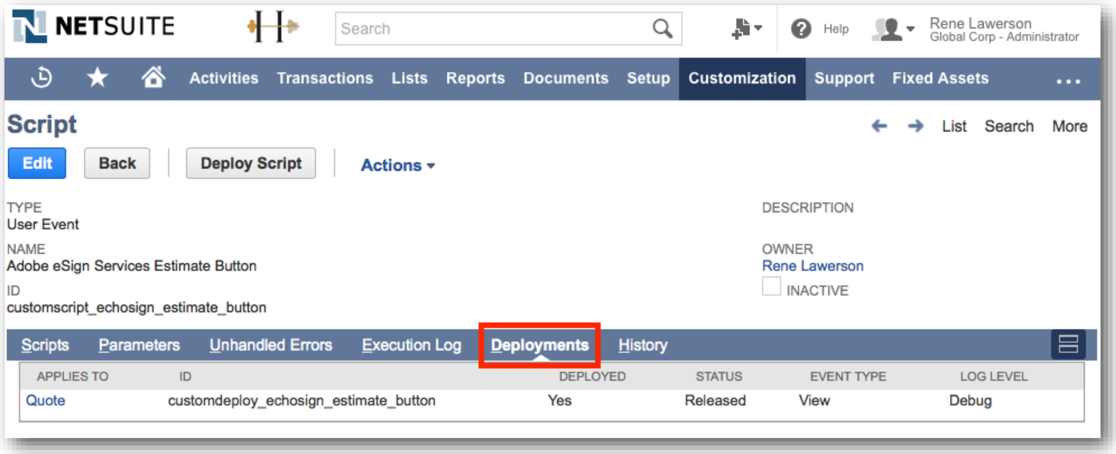


2. On the *Scripts* page, locate the *Adobe eSign Services Estimate Button* script (controls the *Send for Signature* button), then click **View**.



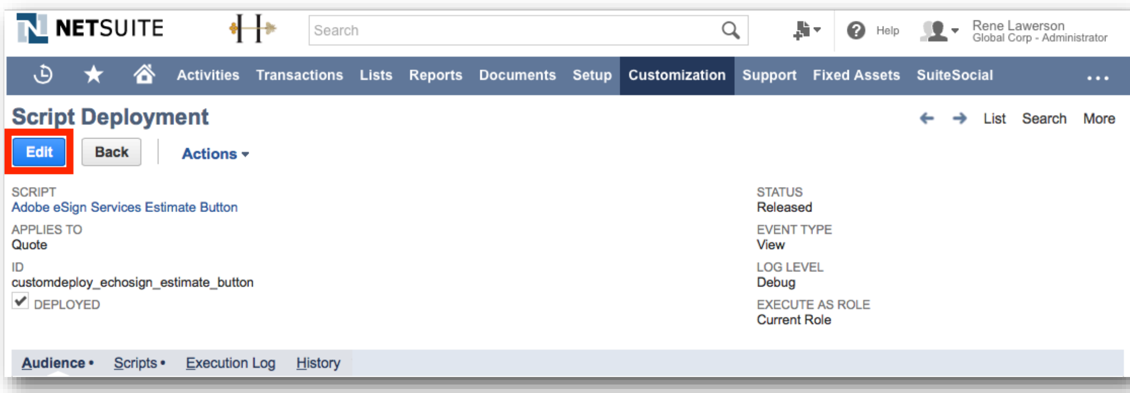
3. On the *Script* page, do the following:

   a) Click the **Deployments** sub-tab.

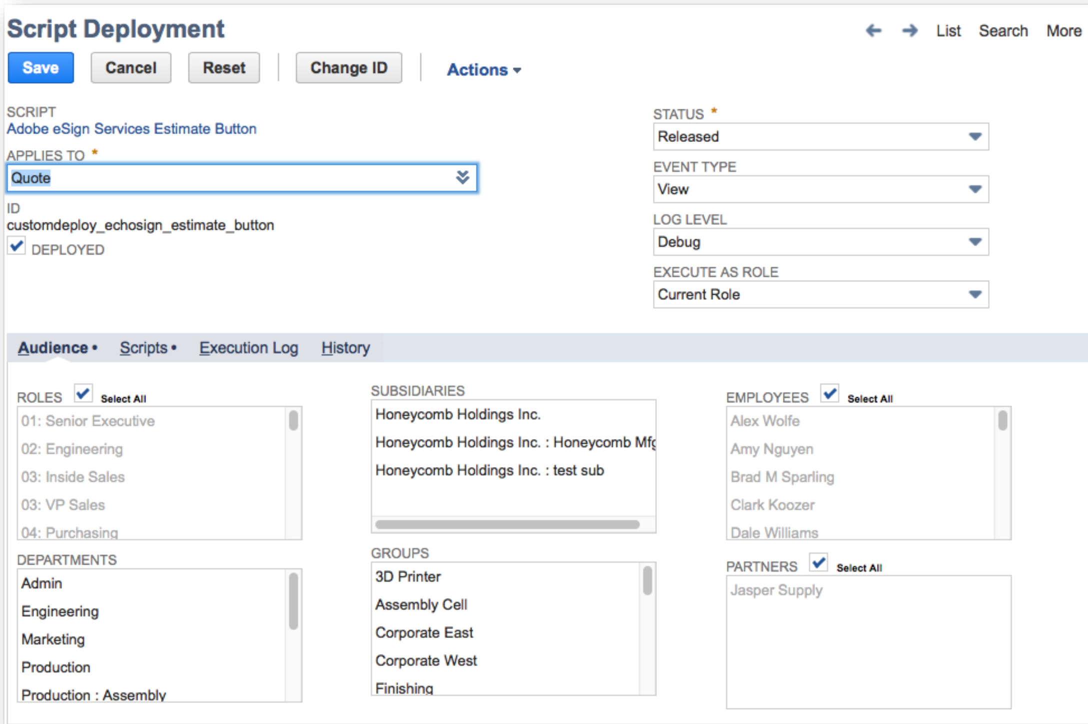


   b) Under "*Applies to*" click the **Quote** link.

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



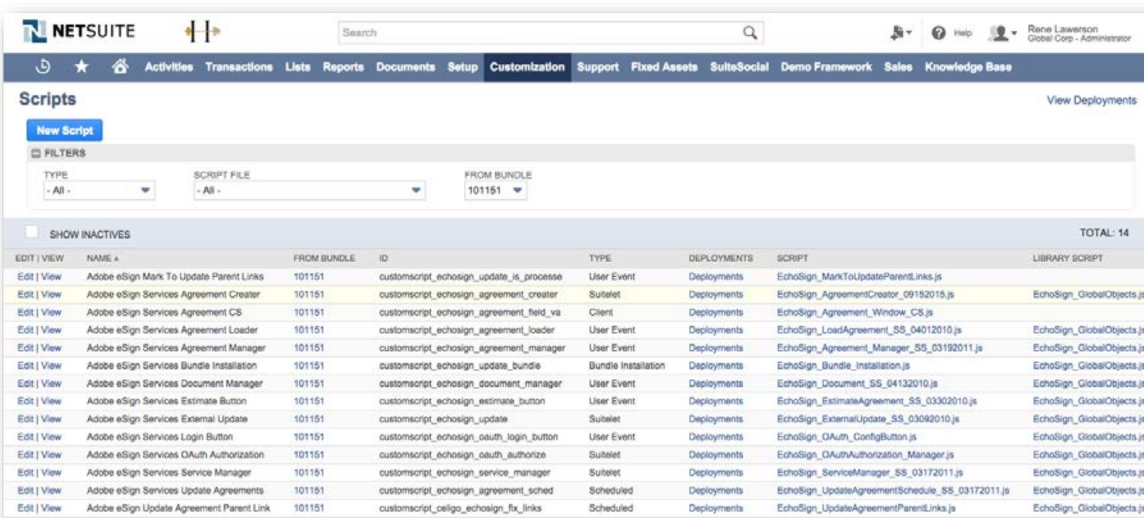
d) With the **Audience** sub-tab active (it is active by default), select the specific roles or users that you want to grant access to. If you want to grant access to all roles and users, enable the respective **Select all** options as shown below.



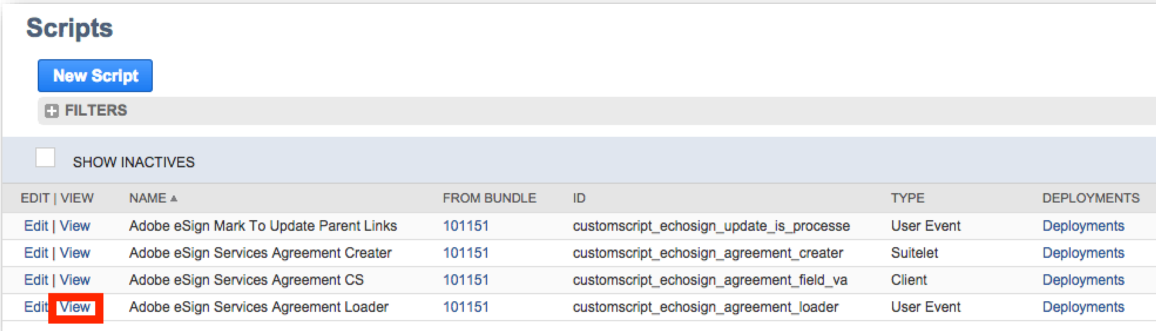
e) Click **Save**.

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.

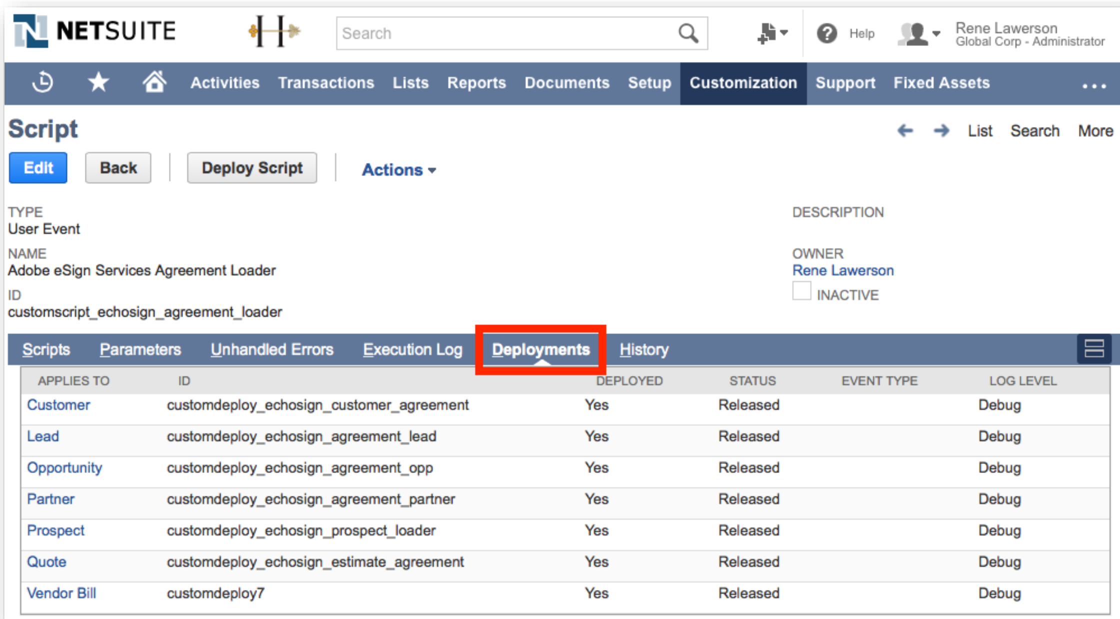


2. On the *Scripts* page, locate the *Adobe eSign Services Agreement Loader* script (controls the *Agreements* tab), then click **View**.



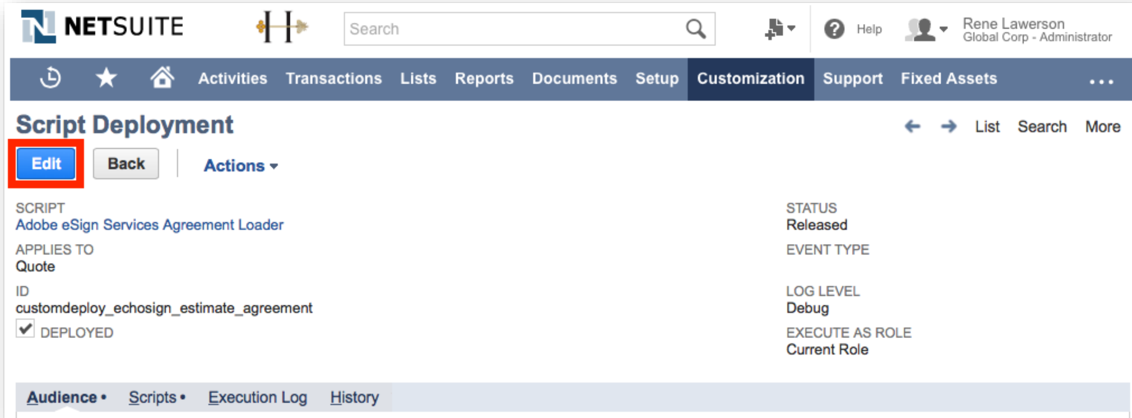
3. On the *Script* page, do the following:

   a) Click the **Deployments** sub-tab.

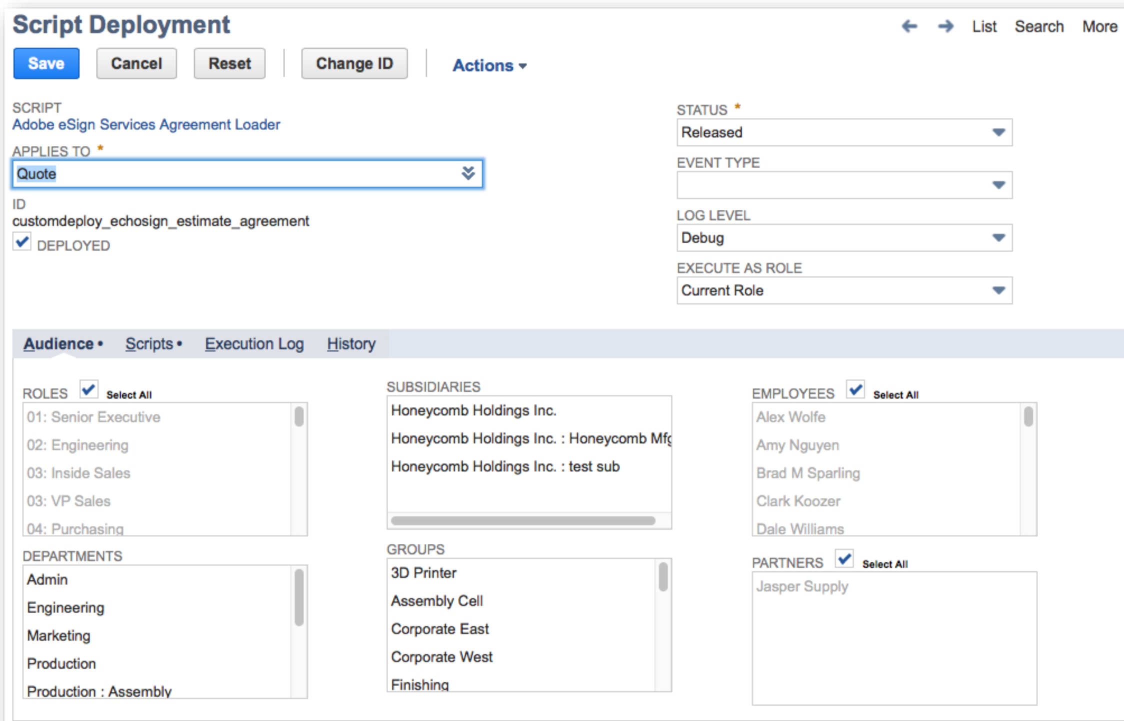


   b) Under "*Applies to*" click the link for the entity (*Quote* in this example) that you want to modify access for.

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



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.



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.

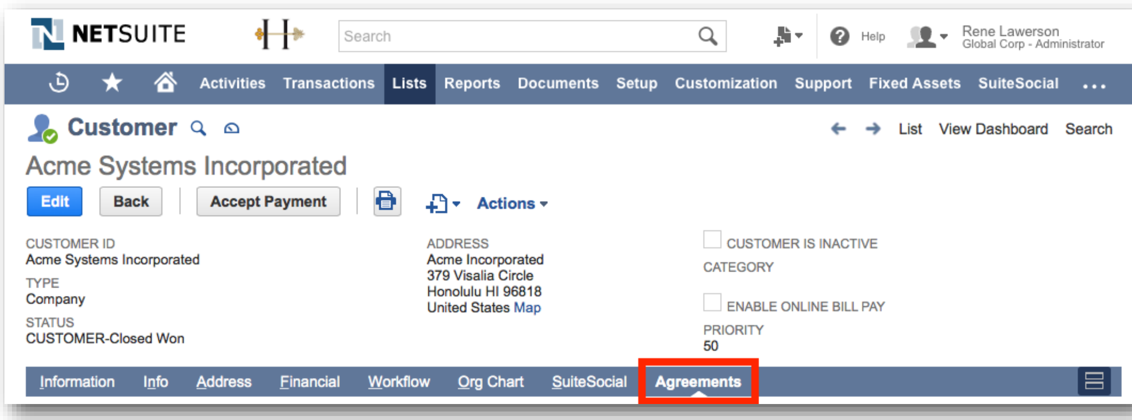
Creating an Adobe eSign services agreement

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 form a customer record.

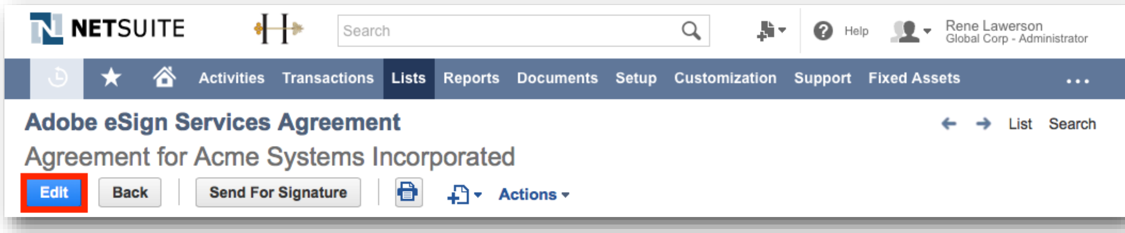
1. Select or create a customer record you would like to send an agreement from or you can select another NetSuite record type that has the Agreements tab enabled.

2. From that record, click on the **Agreements** sub-tab.

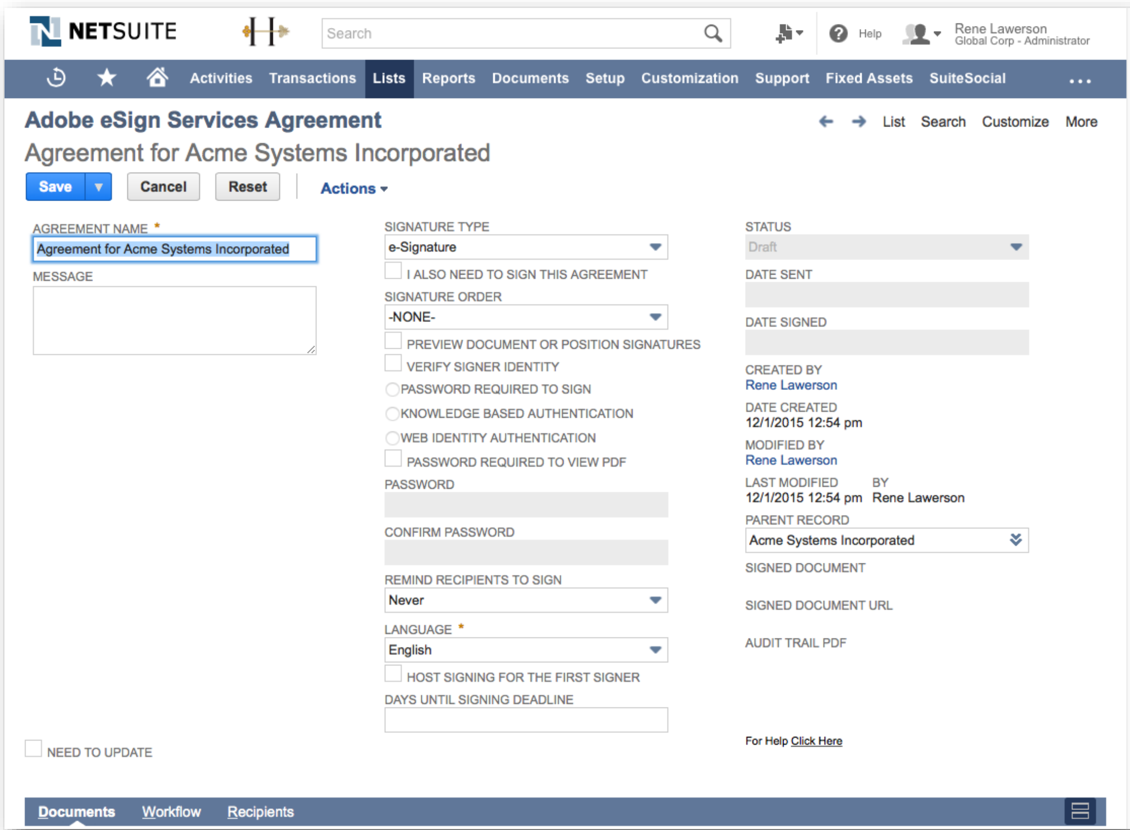


3. Click **New Agreement**.

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



The page updates.



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.

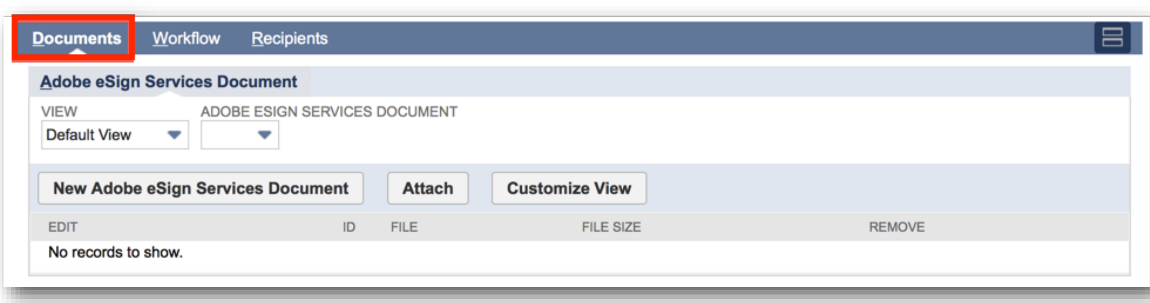
  Note: This option display only when more than one of the three signer identity verification methods listed below is enabled in Custom Preferences. (See [Setting custom preferences for the first time]() for more information.) If only one preference is enabled, the **Verify Signer Identity** option does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

  Identity Verification Methods

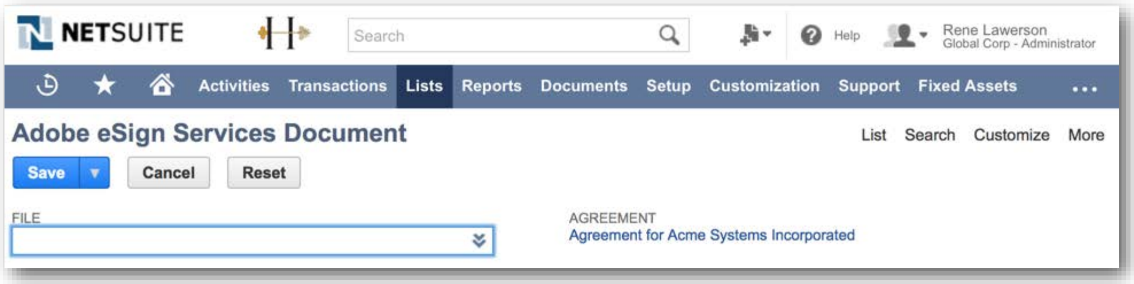
  - **Password Required to Sign:** Require Signers to enter a one-time password you specify.
  - **Knowledge Based Authentication:** Require signers to provide their name, address and optionally the last 4 digits of their SSN and then answer a list of questions verifying the information they provided. 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.



7. 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.



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

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.

9. 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.

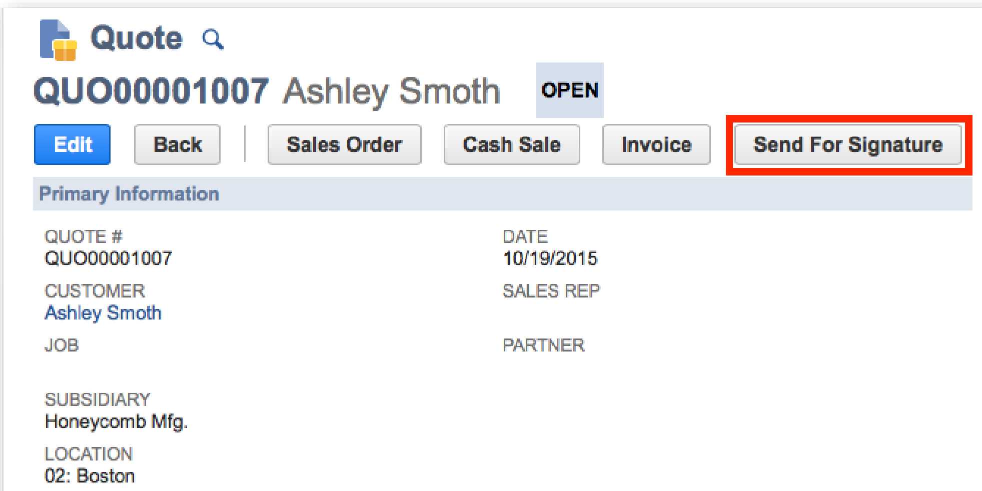
A *Host Signing for Current Signer* link also appears next to the *Host Signing for First Signer* field, which can be accessed until the document is signed. Use this link to host agreement signing for multiple signers, or to reopen the pop-up window if it accidentally closed.

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

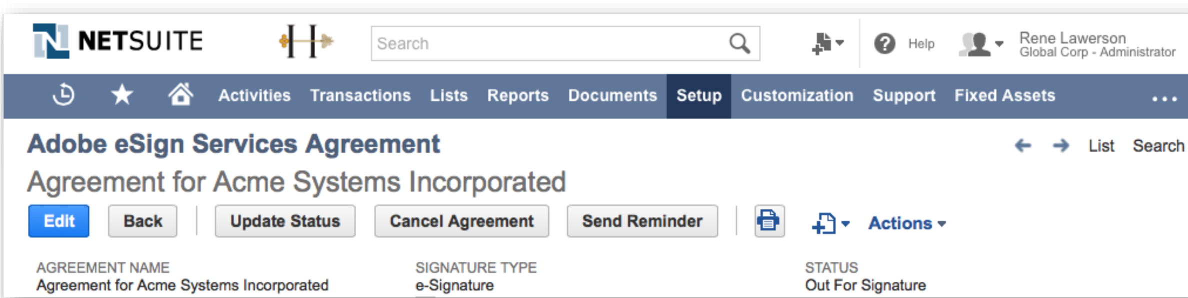
Adobe eSign services has a direct integration with Quotes in NetSuite so that a PDF of the quote is automatically generated and attached to the agreement record.

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.)



Tracking status and sending reminders

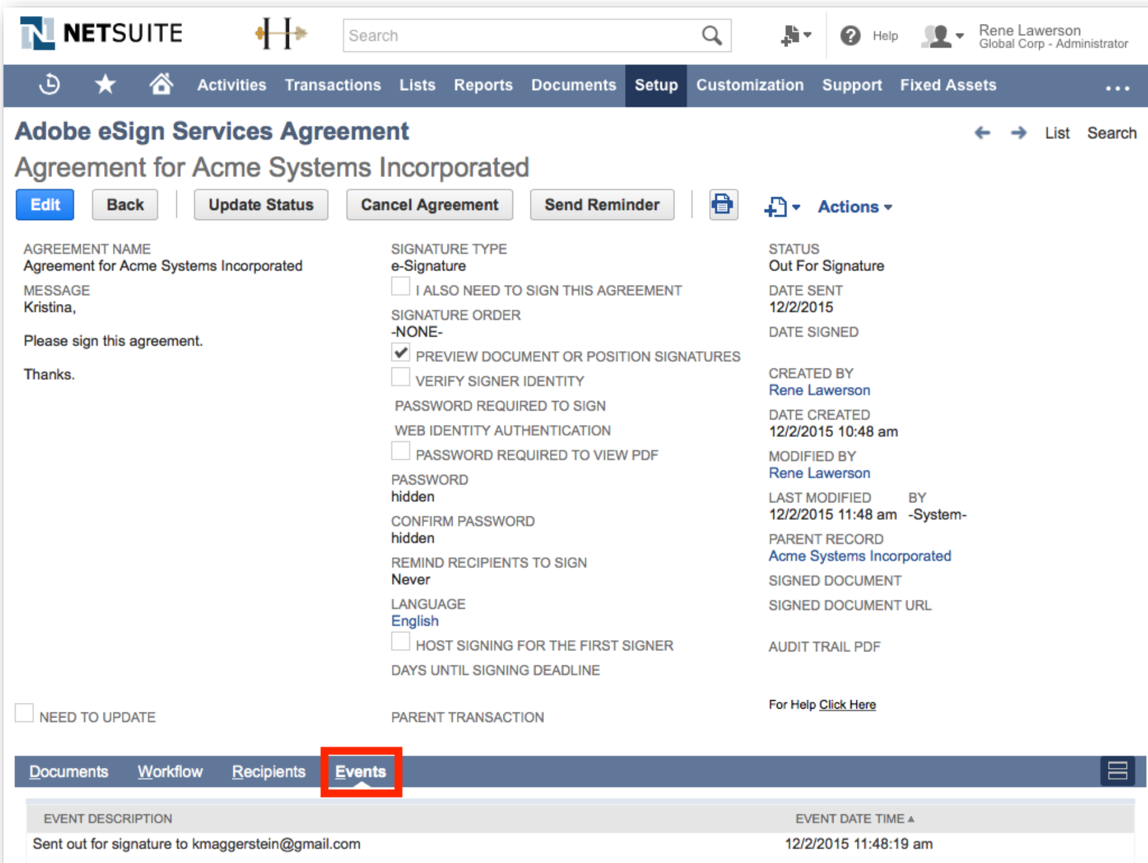
After you send an agreement, the document status changes to *Out for Signature* in the Agreement details section.



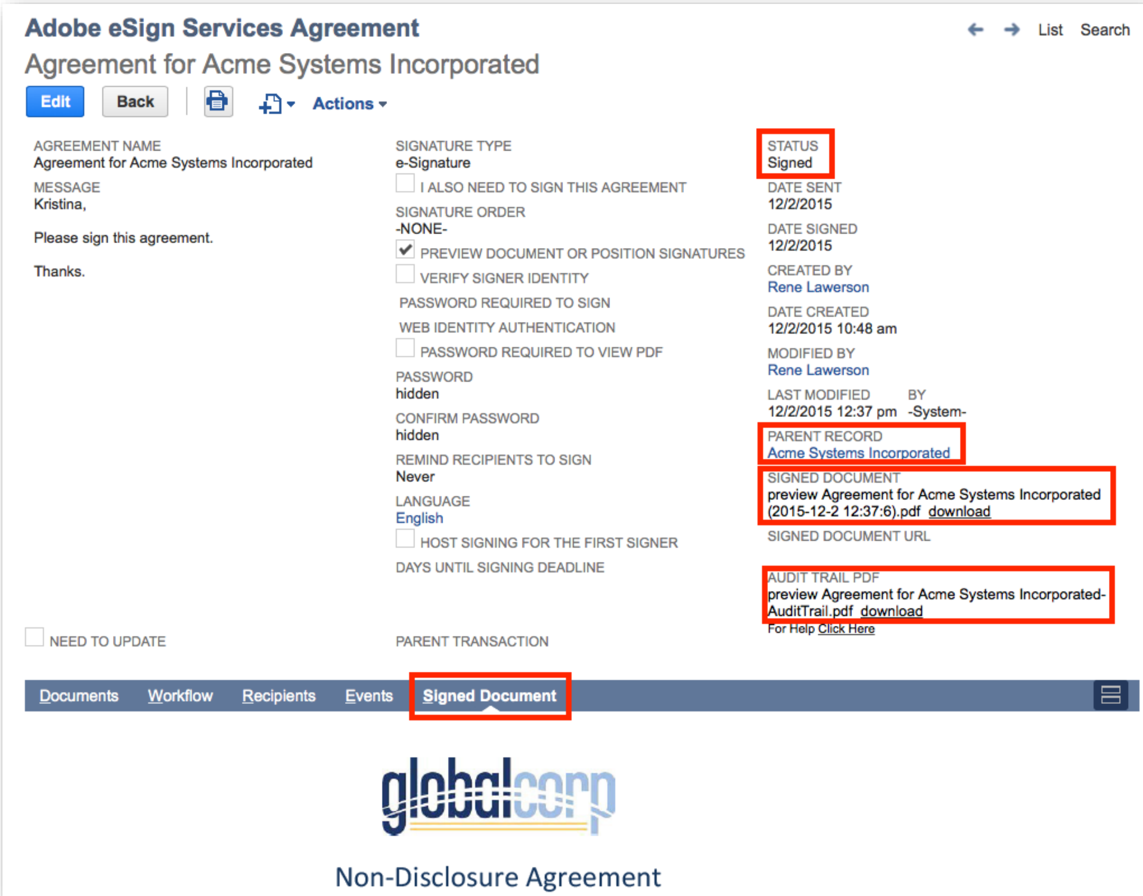
The **Send for Signature** button is replaced by the **Update Status**, **Cancel Agreement**, and **Send Reminder** buttons, which function as follows:

- **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.



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.



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.)

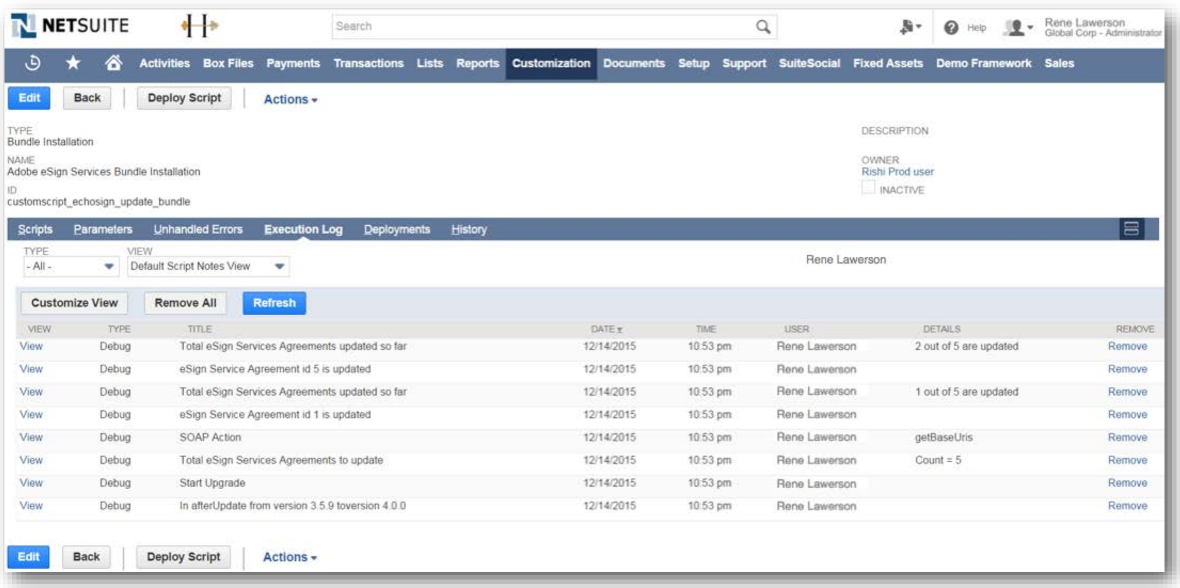
Please note that if you uninstall the bundle, unsigned agreements will be deleted. Signed agreements and their corresponding audit PDF files will not be affected. Do NOT uninstall the bundle if you need to retain your unsigned agreements.

Troubleshooting

Determining the progress of the update

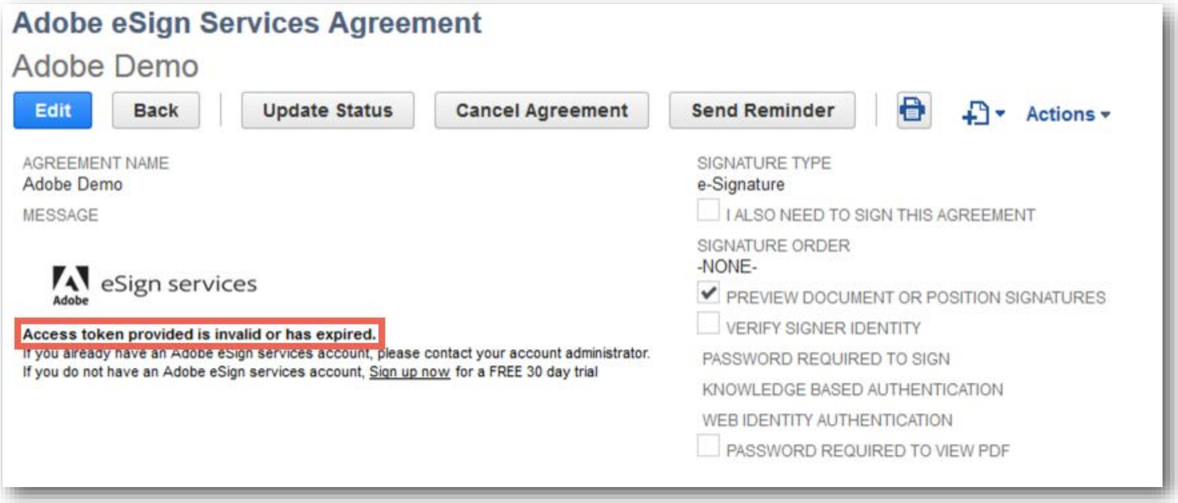
If the update to 4.0 appears to be taking longer than, you can check the Execution Log sub-tab for the Adobe eSign Services Bundle Installation script to determine the progress of your update as follows:

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.



Resolving access token issues

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



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.](https://www.echosign.adobe.com/en/support.html)