
Adobe Document Cloud eSign Services

for Salesforce Version 17
Installation and Customization Guide

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Overview

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

- Professional
- Enterprise
- Unlimited
- Developer
- Ultimate

Reap immediate benefits for your document and signature workflows.

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

Install and Configure eSign Services for Salesforce v17

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

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

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

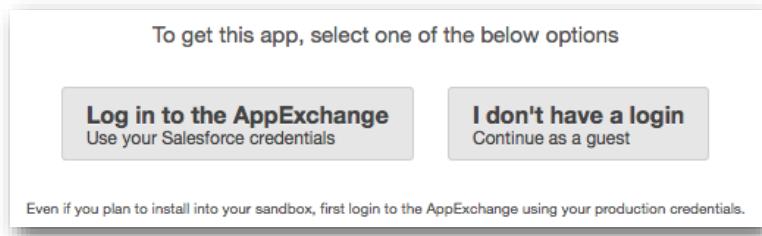
Installing eSign Services

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

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



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



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

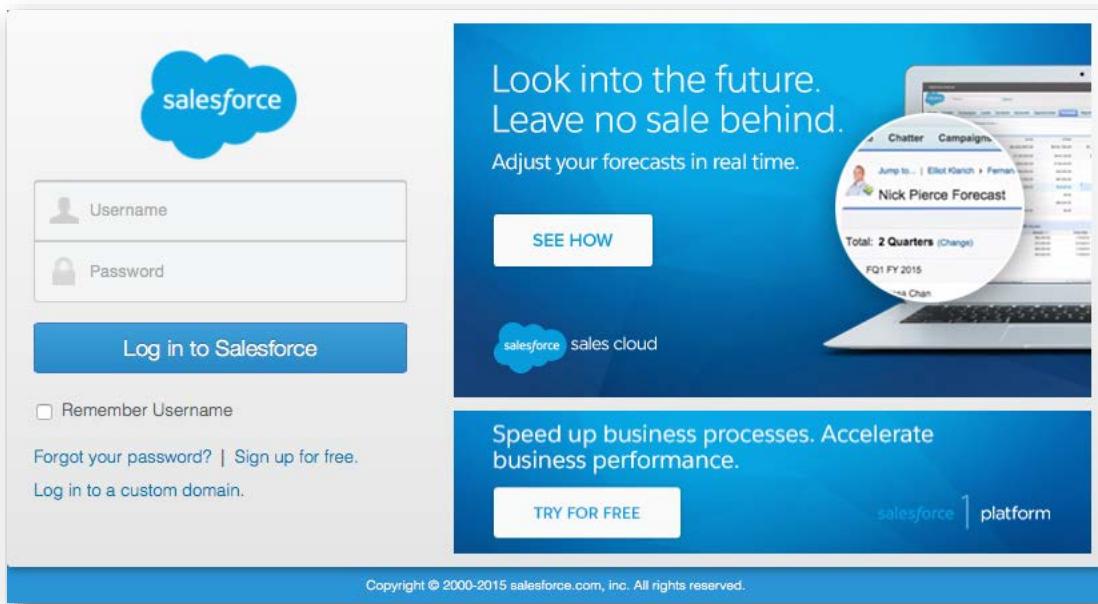


5. Review the installation information and terms and conditions, confirm that you have read and agree to the conditions, then click **Confirm and Install!** to start the installation process.

i Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING <p>PACKAGE eSign services from Adobe: formerly EchoSign (e-Sign, eSignature)</p> <p>VERSION Adobe Document Cloud eSign Services (17.x)</p> <p>SUBSCRIPTION Free</p> <p>DURATION Does Not Expire</p> <p>NUMBER OF SUBSCRIBERS Site-wide</p>	WHERE YOU ARE INSTALLING <p>ORGANIZATION ABC Corporation</p> <p>EDITION Developer</p> <p>USER NAME rlawerson@gmail.com</p>
<input checked="" type="checkbox"/> I have read and agree to the terms and conditions .	
Cancel Install Back to previous step	Confirm and Install!

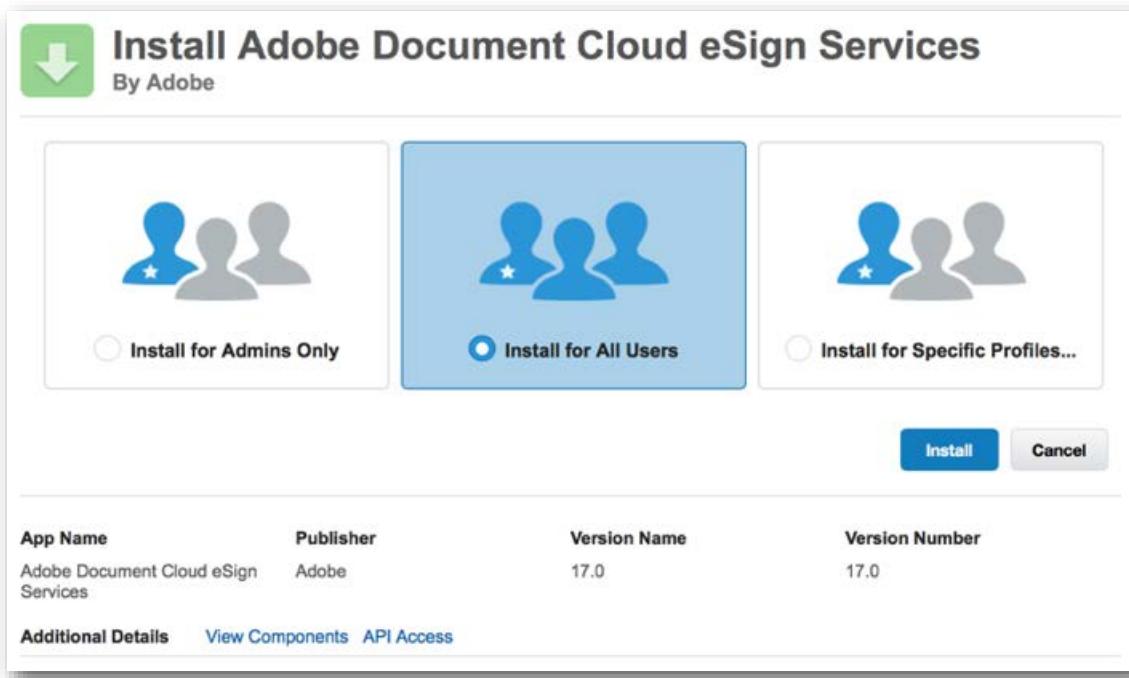
6. When prompted to login to your Salesforce organization, enter the Username and Password then click **Login in to Salesforce**.



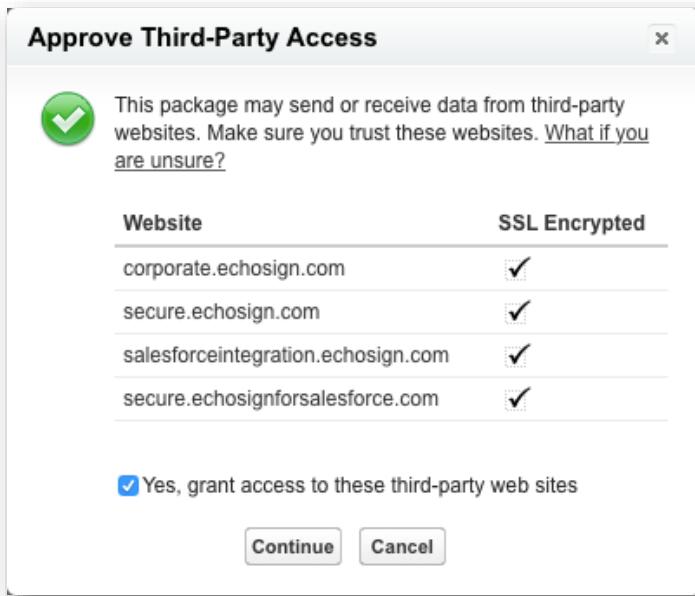
Note: You can optionally register for mobile phone during log in. Or you can respond 'No thanks'.

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

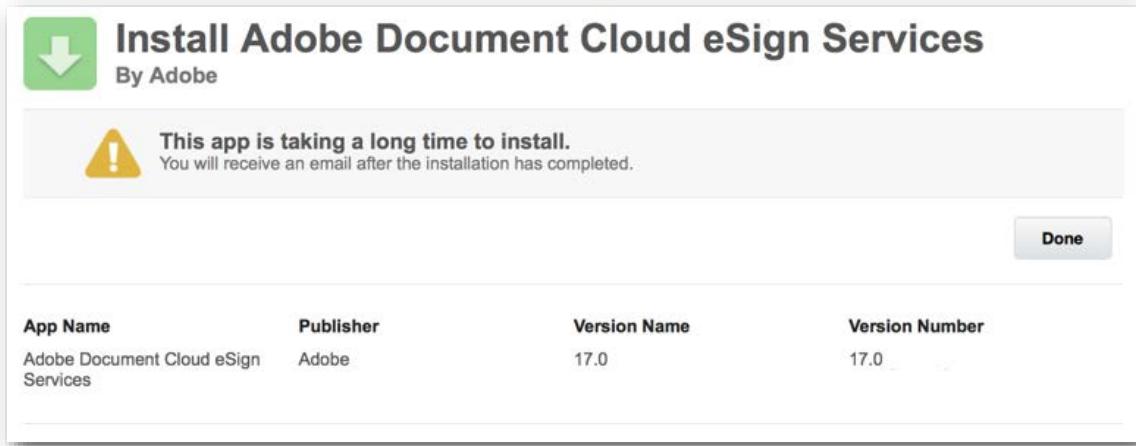
Note: If you select 'Install for Admins Only' or 'Install for Specific Profiles' when installing for the first time, you will need to grant additional access later. For instructions on how to enable access for additional user profiles after installation, please refer to this [documentation guide](#)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



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



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



The Installed Package page displays your installation information.

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

Configuring eSign Services after Installation

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

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

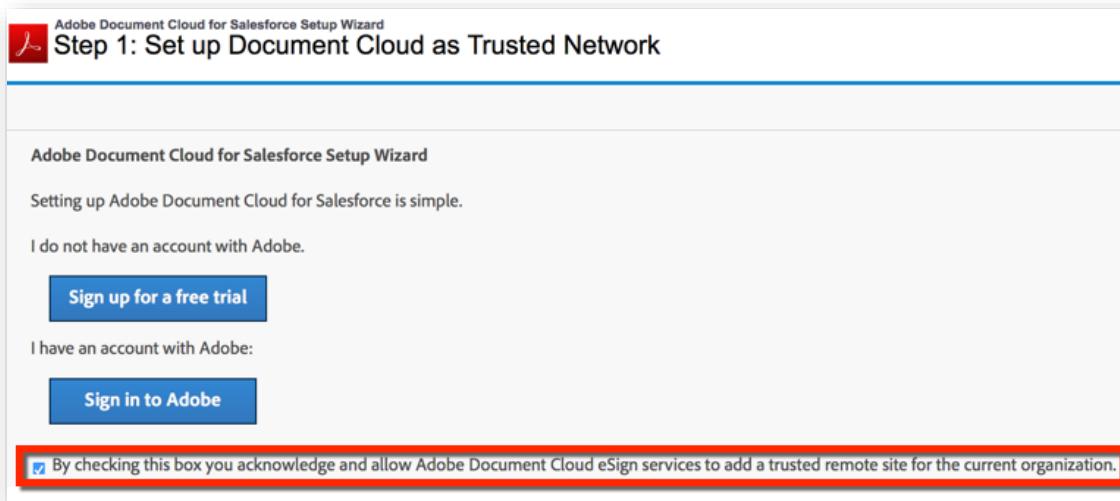
1. Select **Adobe Document Cloud** from the Force.com App Menu at the far right then click the **eSign Services Admin** tab to launch the Setup Wizard.



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

A screenshot of the Account Setup page in eSign Services Admin. It shows the "Advanced eSign Features", "Account Setup" (selected), and "Resources" tabs. Below the tabs, there's a section titled "Launch Setup Wizard" with the sub-instruction "Use wizard for simple 1-2 step setup". Other options listed include Authenticate Document Cloud eSign Services Account, Add Document Cloud Network Access Range 1, Add Document Cloud Network Access Range 2, Update Salesforce User Name or Password to Enable Automatic Status Updates, and Access Document Cloud eSign Services Account Management Console.

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



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

The screenshot shows a web browser window with the title "Adobe Document Cloud / eSign services". Below the title is a "Sign In To Your Account" section. It contains two input fields: "Email:" with the value "rlawerson@gmail.com" and "Password:" with several red dots indicating the password. Below these fields is a large blue "Sign In" button. At the bottom of the form is a link "I forgot my password".

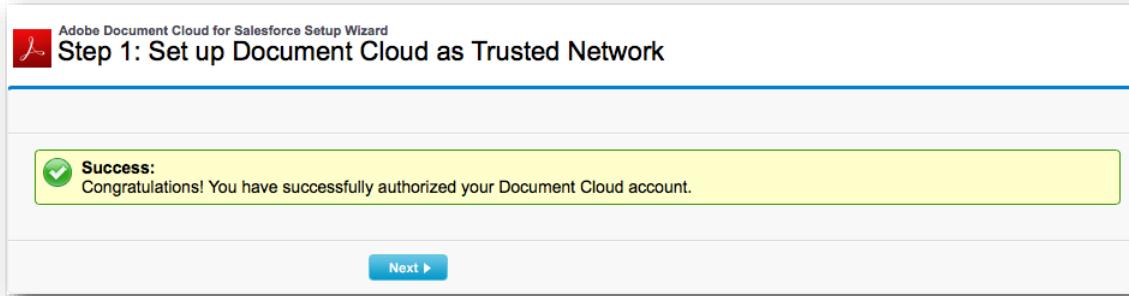
- b) If you select 'Sign up for a free trial account', a new browser page opens prompting you to create a new account. After you create your account, you must close the browser page, navigate back to the Salesforce page, then select the 'Sign in to Adobe' option to continue.
3. After signing in to your Adobe Account, the Confirm Access page (for OAuth) displays. Click **Allow Access**.

The screenshot shows a "Confirm Access" page for the email address "rlawerson@gmail.com". The page title is "Confirm Access for rlawerson@gmail.com". It states: "Adobe Document Cloud eSign services wants to be able to do the following:" followed by a list of permissions:

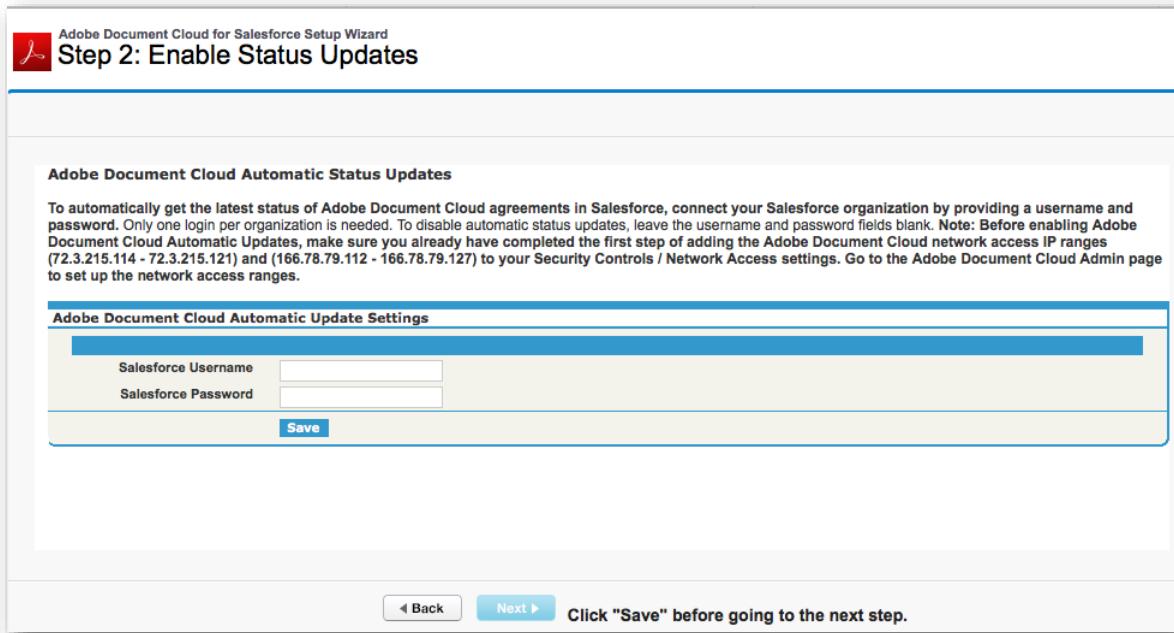
- View users in your account
- Create or manage users within your account
- Login on behalf of any user in your account
- Access documents & data on behalf of any user in your account
- Manage the status of documents on behalf of any user in your account
- Send documents on behalf of any user in your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

It also states: "Adobe Document Cloud eSign services will have permanent access to your account (unless you revoke it)". At the bottom are two buttons: "Allow Access" (blue) and "Cancel" (grey). The footer includes language settings ("Language English: US"), copyright information ("© 2015 Adobe Systems Incorporated. All rights reserved. Terms Privacy Cookies Consumer Disclosure Trust"), and a link to "Installations and Customization Guide".

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



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



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

The screenshot shows the 'Step 2: Enable Status Updates' page of the setup wizard. At the top, it says 'Adobe Document Cloud for Salesforce Setup Wizard' and 'Step 2: Enable Status Updates'. Below this, there's a section titled 'Adobe Document Cloud Automatic Status Updates' with a note about connecting to Salesforce. A green success message box contains the text: 'Success: Congratulations! Automatic Status Updates have now been enabled for your account.' Below the message, there's a form for 'Adobe Document Cloud Automatic Update Settings' with fields for 'Salesforce Username' (raverson@gmail.com) and 'Salesforce Password' (redacted). A 'Save' button is at the bottom of the form. At the bottom of the page, there are navigation buttons: '< Back', 'Next >', and a note: 'Click "Save" before going to the next step.'

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

The screenshot shows the final confirmation page: 'Adobe Document Cloud for Salesforce Setup Wizard' and 'Congratulations – your setup is complete!'. It includes a note: 'You can start sending agreements out for signature.' with a link to 'Create New Agreement'. There's also a link: 'Go to the [Document Cloud Admin page](#) for information about advanced features that can help accelerate your eSignature and document workflows.'

Notes:

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

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

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

Adobe Document Cloud eSign Services Admin

Advanced eSign Features Account Setup Resources

- **Custom Settings:** Select the fields and options to enable or disable for the Agreement record.
- **Send for Signature Buttons:** Add a Send for Signature button on a Salesforce page layout to generate an agreement for signature.
 - Add to Account
 - Add to Contact
 - Add to Lead
 - Add to Opportunity
 - Add to Contract
- **Agreement Templates:** Create reusable templates to populate predefined values and selections for agreements. Link an agreement template to a 'Send for Signature' button from a Salesforce object (e.g. Opportunity).
- **Merge Mappings:** Merge data from Salesforce into your Document Cloud agreements before sending for signature.
- **Data Mappings:** Push data from your signed Document Cloud agreements back to Salesforce.com.
- **Group Mappings:** Synchronize users in Salesforce with your Document Cloud eSign Services groups.

For additional instructions, reference the Document Cloud eSign Services [configuration guide](#)

Important Sandbox Testing Notes

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

Adobe Support

For questions and additional assistance, please visit the [eSign Services Help](#).

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

Next Steps after Installation and Configuration

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

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

1. Basic Customization

- Start [sending agreements](#).
- [Add the Agreement List to Contacts, Opportunities, Accounts, Leads and Contracts Page Layouts](#).

2. Advanced Customization and Settings

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

3. Enable Advanced Features

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

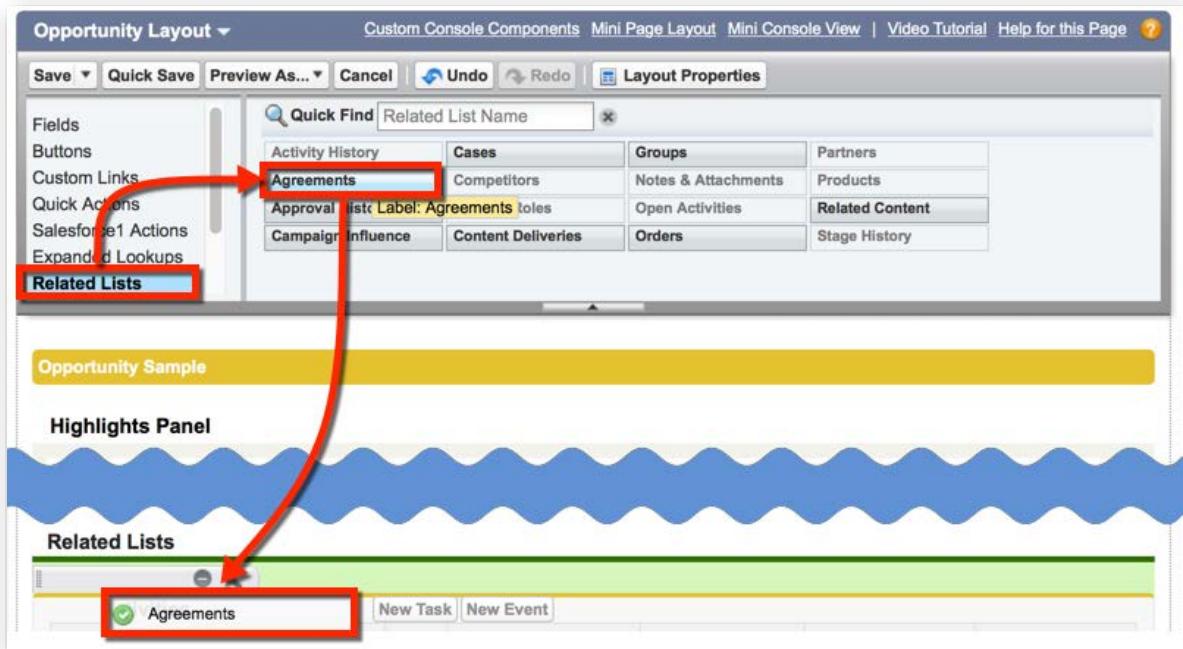
Adding the Agreements List to Page Layouts

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

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

Contact Page Layouts	
Action	Page Layout Name
Edit Del	Contact (Marketing) Layout
Edit Del	Contact (Sales) Layout
Edit Del	Contact (Support) Layout
Edit	Contact Layout

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



4. Click the **Save** button.

Sending an Agreement Using eSign Services for Salesforce

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

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

The screenshot shows the Salesforce Agreement page. A red box labeled '6' highlights the 'Send for Signature' and 'Save Agreement' buttons at the top. A red box labeled '1' highlights the 'Recipients' section, which includes a dropdown for 'Type' set to 'Contact', a search bar, and a 'Send email copies to:' field. A red box labeled '2' highlights the 'Agreement Detail' section, which contains 'Agreement Name' (set to 'Test'), a 'Message' field ('Please review and sign this document.'), 'Language' (set to 'English (United States)'), 'Signature Type' (set to 'e-Signature'), and 'Opportunity' and 'Account' fields. A red box labeled '3' highlights the 'Agreement Options' section, which includes a 'Signing Deadline' field ('4/15/2015'), and checkboxes for 'Remind recipient to sign' and 'Preview document or position signature fields'. A red box labeled '4' highlights the 'Security Options' section, which includes options for 'Verify signer identity using a password' and 'Password protect the signed document'. A red box labeled '5' highlights the 'Attachments' section, which includes a 'Title' field, 'Last Modified Date', 'Created By', an 'Upload File' button, and a note to 'Select from: Salesforce Documents | Salesforce CRM Content or Files'. The bottom of the page features a 'Document Cloud Actions' section with 'Send for Signature' and 'Save Agreement' buttons.

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

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

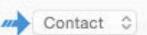
3. Name the agreement, type a message, select signature type and language. Select a related Opportunity or Account.
4. Select the relevant sending options such as expiration date, reminders, or enable the *Preview document or position signature fields* option.
5. Select the security options such as a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

Replace Signer

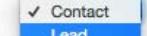
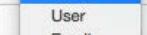
When the agreement is out for signature, you can replace the current signer.

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

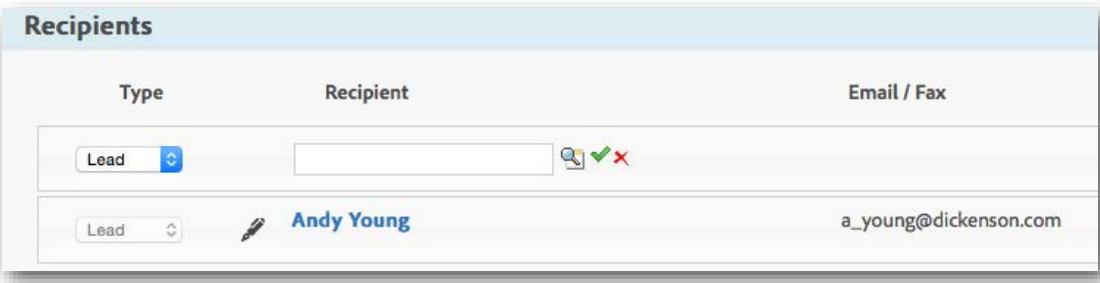
1. Open the agreement.
2. In the *Recipients* section, click the replace signer icon .

Recipients			
Type	Recipient	Email / Fax	
 Contact	 Kristina Maggerstein 		kmaggerstein@gmail.com
Lead	 Andy Young		a_young@dickenson.com

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

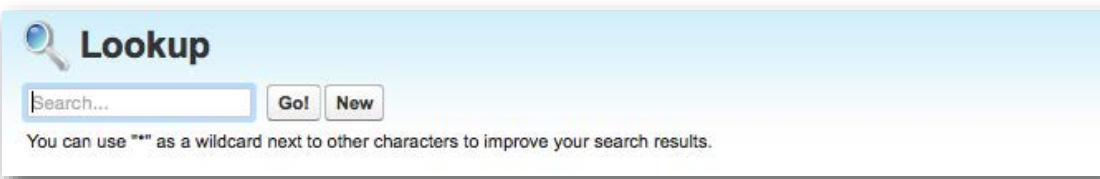
Recipients			
Type	Recipient	Email / Fax	
 Contact  Lead User Email	  Andy Young 		kmaggerstein@gmail.com
			a_young@dickenson.com

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



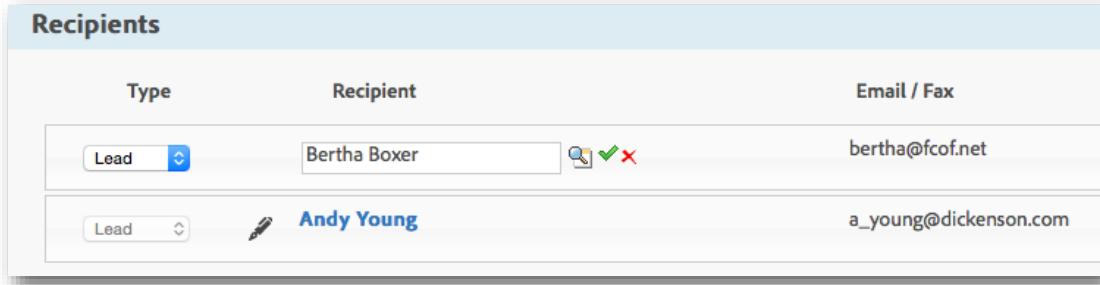
The screenshot shows a list of recipients. At the top, there's a search bar with a dropdown set to "Lead" and a search icon. Below it, a row shows "Lead" selected in a dropdown, a search bar containing "Andy Young", and a row of icons including a magnifying glass, a checkmark, and a cancel icon. The main list area shows one recipient: "Andy Young" with an email address "a_young@dickenson.com".

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



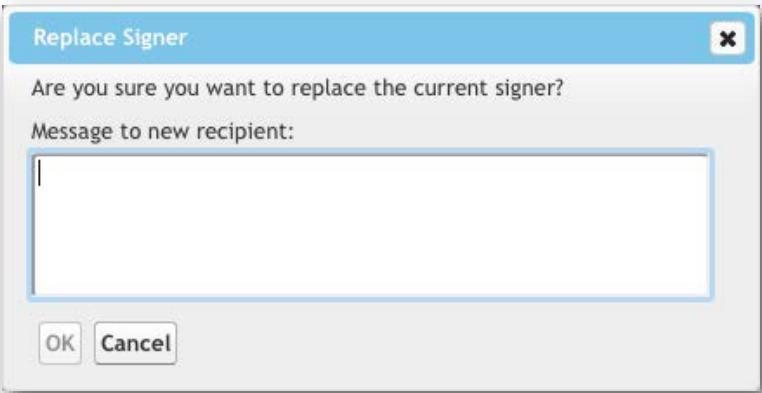
The screenshot shows the "Lookup" dialog box. It has a search bar with placeholder text "Search...", a "Go!" button, and a "New" button. Below the search bar is a note: "You can use *** as a wildcard next to other characters to improve your search results."

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



The screenshot shows the same list of recipients as before, but now the search bar contains "Bertha Boxer" and the checkmark icon  is visible next to the search bar, indicating the search has been saved.

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



The screenshot shows the "Replace Signer" dialog box. It asks "Are you sure you want to replace the current signer?". Below that is a "Message to new recipient:" label followed by a large text input field. At the bottom are "OK" and "Cancel" buttons.

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

Type	Recipient	Email / Fax
Lead	Bertha Boxer	bertha@fcf.net
Lead	Andy Young	a_young@dickenson.com

Manage Agreements

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

The screenshot shows the 'Manage Agreements' tab selected in the top navigation bar. On the left, there's a sidebar with filters for 'Name or Company' and 'Document Status', and a search bar. The main area lists agreements categorized by status:

- Waiting For Me to Approve (1)**: Kristina Maggerstein, Acme Marketing, Non-disclosureAgmt_Simple, 04/15/15
- Waiting For Me to Sign (1)**: Kristina Maggerstein, Acme Marketing, GlobalCorp Client_Services_Agre..., 04/15/15
- Draft (7)**: kmaggerstein@gmail.com, GlobalCorp Consultants Agree..., 04/09/15; Form Field Template, Client Services Form Fields, 04/09/15; Document Template, Client Services Agreement, 04/09/15; kmaggerstein@gmail.com, GlobalCorp Client_Services_Agre..., 04/09/15; Document Template, Consultants Agreement, 04/09/15; kmaggerstein@gmail.com, GlobalCorp Consultants Agree..., 04/09/15; Document Template, Consultants Agreement, 04/09/15
- Out for Signature (0)**
- Signed (2)**: Kristina Maggerstein, Acme Marketing, I-9 (Employment Eligibility Verific..., 04/15/15; kmaggerstein@gmail.com, GlobalCorp Consultants Agree..., 04/13/15

To the right of the list, a specific document is viewed in detail. It's an 'I-9 (Employment Eligibility Verification)' form from the U.S. Citizenship and Immigration Services. The form includes fields for personal information like Name, Address, and Social Security Number, along with checkboxes for employment status and signature fields for employer and employee. A sidebar on the right provides options to View, Share, Protect, Remind, and History.

Using eSign Services Forms

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

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

eSign services Text tags provide the following benefits:

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

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

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

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

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

About Form Field Data Mappings

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

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

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

Fields Mapping

(Optional) Import fields from signed Agreement:

For each Field Mapping row, select: 1) the Salesforce Object and Field to update, 2) where the data is coming from (EchoSign Form Field is the Adobe Document Field), and 3) when to run the mapping.

Actions	Disable	1) Which Salesforce Object to Update?	Which Salesforce Field to Update?	2) Where is the Data Coming From? - Select Type	What is the Value of the Data?
	<input type="checkbox"/>	Contact	First Name (String)	EchoSign Form Field	<input type="text" value="firstname"/>
	<input type="checkbox"/>	Contact	Last Name (String)	EchoSign Form Field	<input type="text" value="lastname"/>
	<input type="checkbox"/>	Opportunity	Stage (Picklist)	Constant	Closed Won

File Mapping

For each File Mapping row, select: 1) the Salesforce Object to update, 2) how to add the file, 3) which file to add and 4) when to run the file mapping.

Actions	Disable	1) Which Salesforce Object to Update?	2) How Do You Want to Add the File?	Which Field to Add the File URL?	3) Which File to Add?
	<input type="checkbox"/>	Opportunity	Attach file directly to object	<input type="text"/>	<input type="text" value="Signed Agreement - Merged PDF"/>
	<input type="checkbox"/>	Opportunity	Attach file directly to object	<input type="text"/>	<input type="text" value="Audit Trail"/>

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

Creating a Form Field Data Mapping

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

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

Recent Data Mappings

New

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

Data Mappings

New Data Mapping

Data Mapping Editor

Set up Document Cloud Data Mappings to specify how to update Salesforce fields with data entered by signers into Document Cloud documents automatically after the Document Cloud agreement is signed or in other stages. Some example data mappings include: 1) updating recipient cc Account, 4) changing Opportunity Stage when the contract is signed, and 5) adding the signed PDF and audit trail to the Contact.

Please refer to the [Installation and customization guide](#) for additional instructions.

Data Mapping Name	Data Mapping 1
Default Data Mapping?	<input type="checkbox"/>

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

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

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

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

Fields Mapping			
(Optional) Import fields from signed Agreement: GlobalCorp Client Services Agreement - TransDigital Opportunity			
Import Form Fields			
Actions	Disable	1) Which Salesforce Object to Update?	Which Salesforce Field to Update?
	<input type="checkbox"/>	Opportunity	PO Number (String)
	<input type="checkbox"/>	Opportunity	Stage (Picklist)
Add Mapping			

Lookup

GlobalCorp Client Services Agreement - TransDigital Opportunity

Go!

You can use '*' as a wildcard next to other characters to improve your search results.

< Clear Search Results

Search Results

Agreement Name	Recipient (Contact)
GlobalCorp Client Services Agreement - TransDigital Opportunity	Sara Tran

- Click the **Import Form Fields** button. The number of fields imported displays.
- You can use **Add Mapping** to add mapping rows individually as shown below:

Fields Mapping

(Optional) Import fields from signed Agreement: 4 form fields were imported to this mapping.

For each Field Mapping row, select: 1) the Salesforce Object and Field to update, 2) where the data is coming from, and 3) when to run the field mapping.

Actions	Disable	1) Which Salesforce Object to Update?	Which Salesforce Field to Update?	2) Where is the Data Coming From? - Select Type
	<input type="checkbox"/>	Opportunity	PO Number (String)	EchoSign Form Field
	<input type="checkbox"/>	Opportunity	Stage (Picklist)	Constant

For each Field Mapping row, specify the following:

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

1b) Which Salesforce Field to Update?—Select the target Salesforce field where the data will be copied.

2a) Where is the Data Coming From?—Select Type—Select one of the following options: *EchoSign Form Field, Constant, or Agreement Field*.

2b) What is the Value of the Data?—Depending on *Data Coming From* option selected, you must specify the following:

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

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

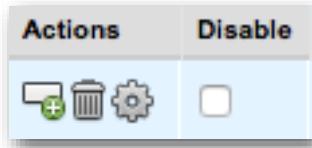
- Signed/Approved
- Waiting for Counter-Signature/Approval
- Out for Signature/Approval
- Cancelled / Declined
- Expired

Actions	Disable	1) Which Salesforce Object to Update?	Which Salesforce Field to Update?
	<input type="checkbox"/>	Opportunity	PO Number (String)
	<input type="checkbox"/>	Opportunity	Stage (Picklist)

2) Where is the Data Coming From? - Select Type	What is the Value of the Data?	3) When to Run Mapping? - Select Agreement Status
EchoSign Form Field	<input type="text"/> PONumber	Signed/Approved
Constant	<input type="text"/> Closed Won	Signed/Approved

6. You can optionally modify the settings for any mapping row.

- Under Actions, click the Settings icon (gear).

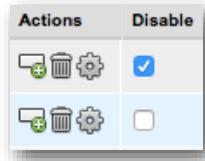


- In the *Field Mapping Value Settings* dialog, you can specify the following:

- Do Not Overwrite Existing**—If checked, then if a value already exists in the target Salesforce field, do not overwrite the value using this mapping rule.
- Do Not Write Empty**—If checked, then if the source value from the eSign services agreement is empty, do not write the empty value into the target Salesforce field using this mapping rule.



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



Creating a File Mapping

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

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

File Mapping				
For each File Mapping row, select: 1) the Salesforce Object to update, 2) how to add the file, 3) which file to add and 4) when to run the file mapping.				
Actions	Disable	1) Which Salesforce Object to Update?	2) How Do You Want to Add the File?	Which Field to Add the File URL?
	<input type="checkbox"/>	Account	Add a reference link to the file	Account Description (Text Area)
	<input type="checkbox"/>	Opportunity	Attach file directly to object	
	<input type="checkbox"/>	Opportunity	Attach file directly to object	

[Add Mapping](#)

3) Which File to Add?	4) When to Run Mapping? - Select Agreement Status
<input type="button" value="Signed Agreement - Merged PDF"/>	<input type="button" value="Signed/Approved"/>
<input type="button" value="Signed Agreement - Merged PDF"/>	<input type="button" value="Signed/Approved"/>
<input type="button" value="Audit Trail"/>	<input type="button" value="Signed/Approved"/>

2. For each File Mapping row, select:

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

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

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

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

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

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

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

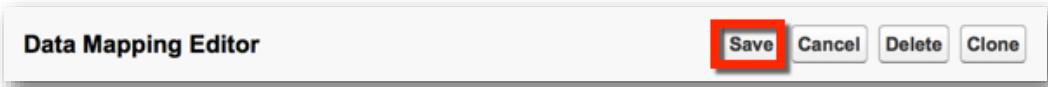
- Signed Agreement – Merged PDF**—Select this option if you send multiple documents for signature in a single transaction, this option will push the signed documents back to the Salesforce object record as a single merged PDF.
- Signed Agreement – Separate PDFs**—Select this option if you send multiple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

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

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

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

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



Using Default and Multiple Data Mappings

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

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

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

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

Troubleshooting Data Mappings

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

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

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

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

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

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

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

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

About Merge Mappings

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

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

Merge Mappings for Adobe Document Cloud

Map Salesforce Object Fields to Document Fields

Target Document Field	Source Type	Source Value
firstname	Salesforce Object Field	Edit : Recipient (Contact) : First Name
lastname	Salesforce Object Field	Edit : Recipient (Contact) : Last Name
phone	Salesforce Object Field	Edit : Recipient (Contact) : Business Phone
notes	Salesforce Object Field	Edit : Recipient (Contact) : Account ID
company	Salesforce Object Field	Edit : Account : Account Name

Creating a Merge Mapping

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

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

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

The New Merge Mapping page displays the Merge Mapping Editor. At the top, there is a header with the title "Merge Mapping" and a "New" button. Below the header, the main area is titled "Merge Mapping Editor" with buttons for "Save", "Cancel", and "Clone". To the right, there is a link to "Adobe Documentation". The "Mapping Information" section contains instructions for setting up Document Cloud Merge Mappings. It includes fields for "Merge Mapping Name" (with a red placeholder bar) and "Default Merge Mapping?" (with an unchecked checkbox). A "Import Document Form Fields (optional)" button is also present. The "Merge Mappings for Adobe Document Cloud" section is divided into two parts: "Map Salesforce Object Fields to Document Fields" and "Map Salesforce Opportunity Line Item Fields to Document Cloud Document Fields". Both sections have tables with columns for "Target Document Field", "Source Type", "Source Value", "Disable", and "Actions". Each section has an "Add Field Mapping" link. At the bottom of the editor are "Save", "Cancel", and "Clone" buttons.

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

The Merge Mapping 1 page shows the Merge Mapping Editor for a specific mapping named "Merge Mapping 1". The interface is identical to the New Merge Mapping page, featuring a header with "Merge Mapping" and a "New" button, and a "Merge Mapping Editor" section with "Save", "Cancel", "Delete", and "Clone" buttons. The "Adobe Documentation" link is also present. The "Mapping Information" section contains the same instructions and fields as the New Merge Mapping page. The "Merge Mappings for Adobe Document Cloud" section is also visible, though no mappings have been added yet. The "Save", "Cancel", and "Clone" buttons are at the bottom.

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

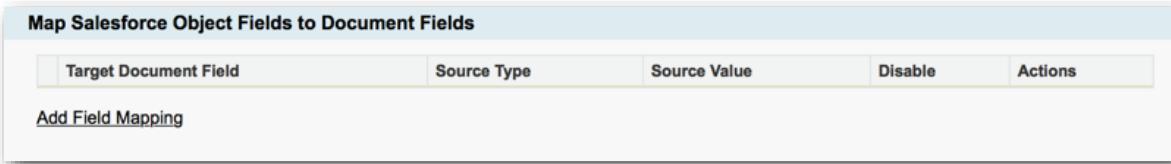


- Select the agreement you would like to import fields from.
- Click the **Import Form Fields** button.

The number of fields imported will be displayed.

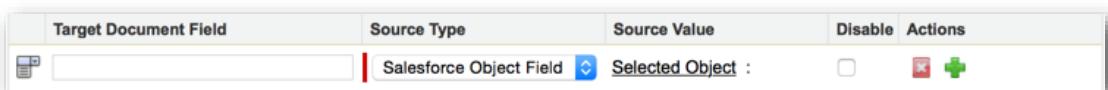


6. In the *Map Salesforce Object Fields to Document Fields* section, you can create a mapping from fields that can be referenced from the eSign services Agreement object (including custom fields). You can also add mapping rules to merge data into eSign services documents.

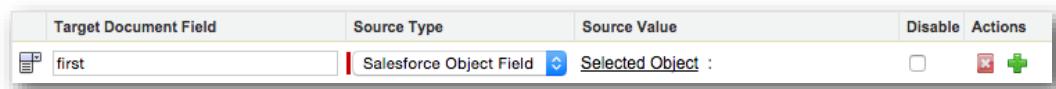


To create a merge field mapping row, do the following:

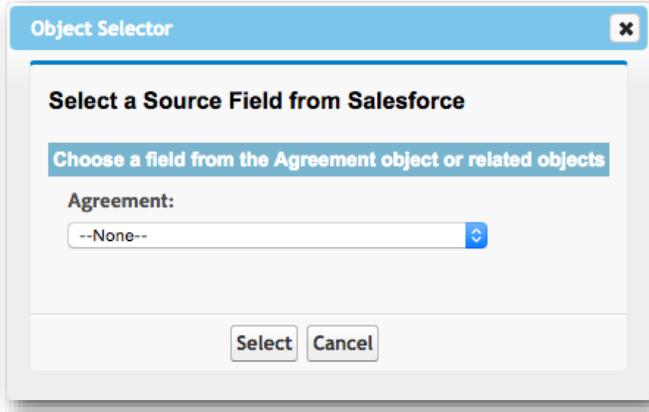
- Click **Add Field Mapping** to add a new, blank row.



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



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



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

Target Document Field	Source Type	Source Value
Service Level	Constant	<input type="text"/>

- **Disable**—If checked, this mapping row will not execute.
- Repeat steps a and b to add more mapping rows.
7. In the *Map Salesforce Opportunity Line Item Fields to Document Cloud Document Fields* section, you can add products lists tied to an opportunity.

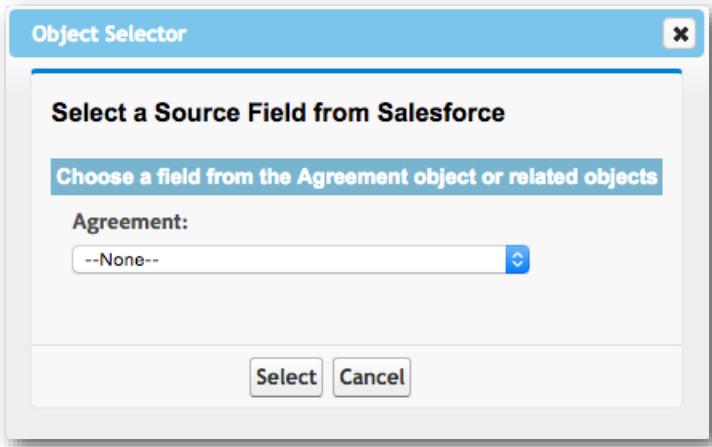
Map Salesforce Opportunity Line Item Fields to Document Cloud Document Fields		
Source Value	Disable	Actions
Add Field Mapping	<input type="checkbox"/>	

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

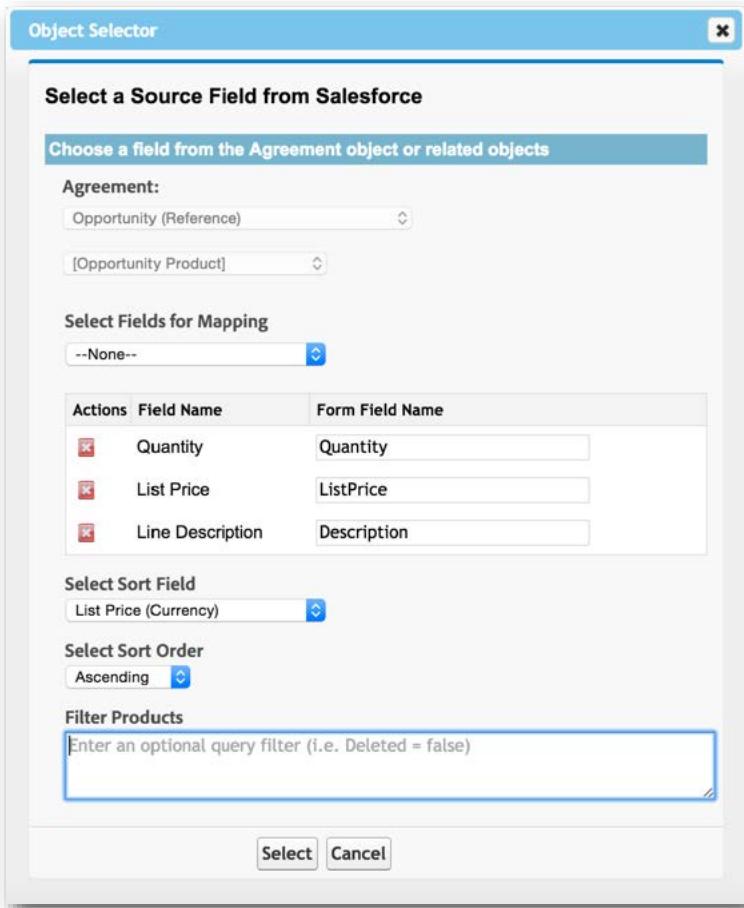
- Click **Add Field Mapping** to add a new, blank row.

Source Value	Disable	Actions
Selected Object :	<input type="checkbox"/>	

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



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



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

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

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

Using Default and Multiple Merge Mappings

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

You may also explicitly specify which merge mapping you'd like to use for an agreement by referencing it in the Agreement's 'Merge Mapping' (echosign_dev1_Merge_Mapping_c) field. You may use a Salesforce workflow or trigger to run any custom business logic to determine which template to use. Please note that you do not need to set that field to point to the default mapping; the default mapping is executed if this field is left blank.

Troubleshooting Merge Mappings

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

If a mapping fails for some reason, it logs the error message in the 'Merge Mapping Error' (echosign_dev1_Merge_Error_c) field on the eSign services Agreement object. You may expose this field on the agreement page layout or create a simple report in Salesforce to find agreements where mapping errors had occurred. In addition, merge mapping errors will be sent to the owner of the merge mapping by email. Click **Setup** then navigate to **Build | Develop | Custom Settings** then select **Document Cloud Settings** to enable or disable the *Enable Mapping Error Notification* setting that controls email notifications. To enable the 'Merge Mapping Error' field, follow the steps [here](#) and drag the field to the page layout.

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

Agreement Templates and 'Send for Signature' Button **(Key Feature)**

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

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

About Agreement Templates

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

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

Creating an Agreement Template

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

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



The New Agreement Template page displays:

The screenshot shows the 'Agreement Template Edit' page. At the top, there's a toolbar with 'Save', 'Save & New', and 'Cancel' buttons. Below the toolbar, a red vertical bar indicates required fields. The main area is divided into several sections:

- Information**: Contains fields for 'Agreement Template Name' (set to 'Agreement Template'), 'Master Object Type' (dropdown), 'Post Sign Redirect Delay (seconds)' (text input), 'Post Sign Redirect URL' (text input), and 'Sender Signs Only' (checkbox). It also includes 'Default' (checkbox), 'Auto Send' (checkbox), and 'Available for Publisher Actions' (checkbox).
- Agreement Information**: Shows 'Agreement Name' (set to 'Adobe Document Cloud Agreement') and a 'Message' field.
- Mapping Settings**: Includes 'Data Mapping' and 'Merge Mapping' fields.
- Referenced Objects**: Lists 'Account', 'Opportunity', and 'Contract' objects.
- System Information**: Shows the 'Owner' as 'Danielle Zerchere'.

At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

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

This is a zoomed-in view of the 'Information' section from the previous screenshot. It includes the following fields:

- Agreement Template Name**: Set to 'Agreement Template'.
- Master Object Type**: A dropdown menu.
- Post Sign Redirect Delay (seconds)**: An empty text input field.
- Post Sign Redirect URL**: An empty text input field.
- Sender Signs Only**: An unchecked checkbox.
- Default**: An unchecked checkbox.
- Auto Send**: An unchecked checkbox.
- Available for Publisher Actions**: An unchecked checkbox.

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

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

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

The screenshot displays the 'Agreement Information' configuration interface. It includes the following fields:

- Agreement Name:** A text input field containing the value "Adobe Document Cloud Agreement".
- Message:** A large text area for entering a message, currently empty.
- Signature Type:** A dropdown menu set to "e-Signature".
- Language:** A dropdown menu set to "English (United States)".

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

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

Example 1:

Master Object: Opportunity

Agreement Name: Acme Corp Agreement - {!Name}

Message:

Here is the estimate for:

Account: {!Account.Name}

Amount: {!Amount}

Please sign the attached agreement.

Thanks, {!Owner.Name}

The following is the result when the Agreement gets generated from a specific Opportunity:

Agreement Detail	
Agreement Name	Acme Corp Quote Agreement – Customer Opp – Acme EchoCorp
Message	Here is the quote for: Account: Company XYZ Amount: 1620000.00 Please sign the attached agreement. Thanks, Amy Wang
Language	English (United States)
Signature Type	e-Signature

Example 2: Custom Object as Master Object

Custom Lookup Field on the Opportunity: Student__c

Agreement Template Definition: AgreementTemplateProcess

Master Object: Student__c

Agreement Name: Student Agreement - {!Name}

Message:

Hello {!Student__r.Student_Name__c}

Please sign the attached application.

Thanks, {!Account.Owner.Name}

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

Agreement Options	
Email Copy To	<input type="text"/>
Automatic Reminders	Never
Signature Flow	Recipients sign in order
Sender Signature Order	Sender signs first, then recipients sign
Send On Behalf Of	<input type="text"/>
Enable Hosted Signing	<input type="checkbox"/>
Enable Preview and Position Fields	<input type="checkbox"/>
Use Fax Number	<input type="checkbox"/>
Days Until Expiration	<input type="text"/>

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

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

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

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

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

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

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

The screenshot shows a configuration interface for 'Agreement Security Options'. It includes two dropdown menus for 'External Signers Verification Method' and 'Internal Signers Verification Method', both currently set to '--None--'. To the right, there is a checkbox labeled 'Password protect the signed document' which is unchecked. Below it are two input fields: 'Password' and 'Confirm Password', both of which are empty.

- **External and Internal Signer Verification Method (Optional)**—Select a verification method for signers in your eSign services account and signers outside of your eSign services account. The options are *None*, *Password to sign agreement*, *Knowledge based authentication*, or *Web identity authentication*.
- Note:** To assign a signer identity verification method to an individual recipient, you need to specify that in the Recipients section, explained below.
- **Password protect the signed document (Optional)**—Enable this option to encrypt the PDF that is sent to signers.
- **Password and Confirm Password**—Enter the password that will be required to open the PDF of the signed agreement.

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

The screenshot shows the 'Mapping Settings' section. It contains two dropdown menus: 'Data Mapping' and 'Merge Mapping', each with a small icon next to it.

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

- **Merge Mapping**—Select a data mapping to merge Salesforce fields into an agreement before sending it.
9. In the *Referenced Objects* section, you can associate an Account, Opportunity, or Contract to this agreement template by typing in the specific ID or entering a Salesforce variable such as {!Id}. This will allow your Agreements list in the referenced object to contain agreements sent with this agreement template.



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

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

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

The screenshot shows the 'Agreement Template Detail' page. At the top, there's a header with a red icon, the title 'Agreement Template', and a sub-title 'Agreement Template'. Below the header are links for 'Customize Page', 'Edit Layout', 'Printable View', and 'Help for this Page'. There are also buttons for 'Edit', 'Delete', and 'Clone'.

The main section is titled 'Agreement Template Detail' and contains the following fields:

- Agreement Template Name:** [Input field]
- Default:** [Check box]
- Master Object Type:** opportunity
- Auto Send:** [Check box]
- Post Sign Redirect Delay (seconds):** [Input field]
- Available for Publisher Actions:** [Check box]
- Post Sign Redirect URL:** [Input field]
- Sender Signs Only:** [Check box]

Below this is a section titled '▼ Agreement Information' containing the following details:

- Agreement Name:** Adobe Document Cloud Agreement
- Message:** [Input field]
- Signature Type:** e-Signature
- Language:** English (United States)

Under '▼ Agreement Options', there are several settings:

- Email Copy To:** dzerchere@gmail.com
- Enable Hosted Signing:** [Check box]
- Automatic Reminders:** Never
- Enable Preview and Position Fields:** [Check box]
- Signature Flow:** Recipients sign in order
- Use Fax Number:** [Check box]
- Sender Signature Order:** [Input field]
- Days Until Expiration:** [Input field]
- Send On Behalf Of:** [Input field]

The page features a decorative blue wavy pattern at the bottom.

At the bottom, there are four sections for managing attachments and form field templates:

- Add Recipients:** [New Add Recipient] [Add Recipients Help]
- Add File Attachments:** [New Add File Attachment] [Add File Attachments Help]
- Add Form Field Templates:** [New Add Form Field Template] [Add Form Field Templates Help]
- Map Data into Agreement Fields:** [New Map Data into Agreement Field] [Map Data into Agreement Fields Help]

- To add recipients to the Agreement Template, do the following:
 - In the Add Recipient section, click the **New Add Recipient** button.

The screenshot shows a simple interface titled 'Add Recipients'. At the top right is a button labeled 'New Add Recipient'. Below it, a message says 'No records to display'.

The *Add a New Recipient* page displays.

The screenshot shows the 'Add a New Recipient' page. At the top left is a red icon of a person. The title 'Add a New Recipient' is centered above a step indicator 'Step 1: Select Recipient Type and Role'. Below the title are 'Next' and 'Cancel' buttons. The main area contains the following fields:

- Source of Recipient:** A dropdown menu set to 'Predefine the Recipient'.
- Recipient Type:** A dropdown menu set to 'Contact'.
- Recipient Role:** A dropdown menu set to 'Signer'.
- Signer Verification Method:** A dropdown menu set to '--None--'.
- Do Not Create Blank Recipient Row:** A checkbox with a question mark icon.

At the bottom are 'Next' and 'Cancel' buttons.

- In "Step 1: Select Recipient Type and Role", select the following:
 - Source of Recipient**—From the drop-down, select one of the following options for specifying the recipient:
 - Predefine the Recipient
 - Look Up Based on Master Object Field
 - Runtime variable

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

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

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

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

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

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

- Click the **Next** to proceed to the next step.
- In "Step 2: Specify the Recipient", do the following:
 - If you selected *Predefine the Recipient* in Step 1 b) above, select a recipient in the **Recipient - <Recipient Type>** field.

Add Recipients

Add a New Recipient

Help for this Page ?

Step 2: Specify the Recipient

Specify the recipient by typing the name or searching by name.

Recipient - Contact

Back Save Cancel

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

Add Recipients

Add a New Recipient

Help for this Page ?

Step 2: Specify the Recipient

Select the source field from the master Opportunity object that will be used to look up the recipient when the agreement is generated.

Select Source Field from Master Object

Back Save Cancel

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

Add Recipients
Add a New Recipient

Step 2: Specify the Recipient

Opportunity Contact Role: Decision Maker

Back Save Cancel

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

Add Recipients
Add a New Recipient

Step 2: Specify the Recipient

Variable Name: MyRecipient

Back Save Cancel

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

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

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

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

```
/apex/echosign_dev1__AgreementTemplateProcess?masterId={!Opportunity.Id}&myRecipient=amy@globalcorp.com
```

Read more in the next section about creating '[Send for Signature](#)' buttons.

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

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

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

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

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

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

The *Add a New File Attachment* page displays.

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

The options are as follows:

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

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

- Quote Document from Opportunity Quote **or** Quote Document from Master Quote (if Master Object is Quote)
- c) Click the **Next** to proceed to the "Step 2: Specify the File Attachment".
- If you selected *Document from EchoSign Cloud Library* in Step 2 b) above, then simply select from the eSign services document templates in the next step.

The screenshot shows a web-based application window titled "Add a New File Attachment". At the top left is a red square icon with a white "e" symbol. To its right is the title "Add a New File Attachment". On the far right is a "Help for this Page" link with a question mark icon. Below the title is a sub-header "Step 2: Specify the File Attachment" followed by "Back", "Save", and "Cancel" buttons. The main area is a table with two columns: "Library Template Name" and "Last Modified". The table contains five rows of data, each with a checkbox and a small blue document icon. The data is as follows:

Library Template Name	Last Modified
<input type="checkbox"/> Consultants Agreement	4/9/15
<input type="checkbox"/> W-4 (IRS Employee's Withholding Allowance)	1/12/15
<input type="checkbox"/> W-9 (Request for Taxpayer Identification Number)	1/12/15
<input type="checkbox"/> I-9 (Employment Eligibility Verification)	12/10/13
<input type="checkbox"/> Consultants Agreement	4/9/15

At the bottom of the table are three buttons: "Back", "Save", and "Cancel".

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

The screenshot shows a user interface titled "Add File Attachments" with a sub-section "Add a New File Attachment". At the top, there's a "Help for this Page" link with a question mark icon. Below the title, it says "Step 2: Specify the File Attachment" and provides "Back", "Save", and "Cancel" buttons. The main content area asks, "Which documents from the master Opportunity object do you want to add as attachments to the agreement when the agreement is generated? You can choose to attach the latest document, the oldest document, or all documents from the master Opportunity object. If you select latest or oldest document, you also need to specify how the selection is determined by either choosing Last Modified Date or Created Date of the document." There are two dropdown menus: "File Selection from Master Object" (set to "--None--") and "Selection Determined By" (set to "--None--"). At the bottom, there are "Back", "Save", and "Cancel" buttons again.

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

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

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

The screenshot shows a Salesforce page titled "Add File Attachments" with a sub-section "Add a New File Attachment". The sub-section is labeled "Step 2: Specify the File Attachment". It contains a "Variable Name" field with the value "MyAttachment". Below the form are three buttons: "Back", "Save", and "Cancel".

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

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

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

Read more in the next section about creating '[Send for Signature](#)' buttons.

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

- Click **Save** to save your attachment, then repeat the above steps to add additional recipients.
- In the *Agreement Template* page, click the **New Add Form Field Template** button.

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

The screenshot shows a Salesforce page titled "Add Form Field Templates" with a sub-section "New Add Form Field Template". Below the sub-section is a message "No records to display".

The *Add a New File Attachment* page displays.

Select field template Save Cancel

Select the form field layer template that will be applied to the document sent for signature. The form field template will automatically add the pre-defined fields to the underlying document in the specified locations.

Library Template Name	Last Modified
Consultants Agreement Fields	4/9/15

Save Cancel

- a) In the Add a New Field Template page, select the template to be used.
Note: Currently only one form field template can be selected per transaction but it can be used on more than one document in the transaction. For example, if your form field template is 10 pages, you can apply it on 2 documents that add up to at least 10 pages in length.
 - b) Click **Save** to save your form field template selection.
4. To map data into agreement fields in the Agreement Template, do the following:
- a) In the *Map Data into Agreement Fields* section, click the **New Map Data into Agreement Fields** button.

Map Data into Agreement Fields New Map Data into Agreement Field

No records to display

The *Add a New Field Mapping* page displays.

Map Data into Agreement Fields Help for this Page ?

Add a New Field Mapping

Step 1 : Select the Field Mapping Method Next Cancel

How would you like to map data into the target agreement field when the agreement is generated?
You can either enter input a specific value (e.g. number, text string) or you can select a field from the master Opportunity object to map data into the target agreement field.

Mapping Method Input Specific Value

Next Cancel

- b) In "Step 1: Select the Field Mapping Method" of the Add a New Field Mapping page, select one of the following mapping methods:
 - Input Specific Value
 - Select Master Object Field

- c) Click **Next** to Continue.
- d) In "Step 2: Specify the Field Value and Target Field of Add a New Field Mapping", do one of the following:
 - If you selected *Input Specific Value* as the mapping method in Step 4 b) above, enter a *Target Field Value* and select a *Target Agreement Field* that data will be mapped into when the agreement is generated.

Map Data into Agreement Fields
Add a New Field Mapping

Step 2 : Specify the Field Value and Target Field

Input a value that will be mapped into the selected target agreement field when the agreement is generated.

Target Field Value

Target Agreement Field Account (Reference)

Back **Save** **Cancel**

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

Map Data into Agreement Fields
Add a New Field Mapping

Step 2 : Specify the Field Value and Target Field

Select the source field from the master Opportunity object that will be used to map data into the selected target agreement field when the agreement is generated.

Select Source Field from Master Object Account ID (Reference)

Target Agreement Field Account (Reference)

Back **Save** **Cancel**

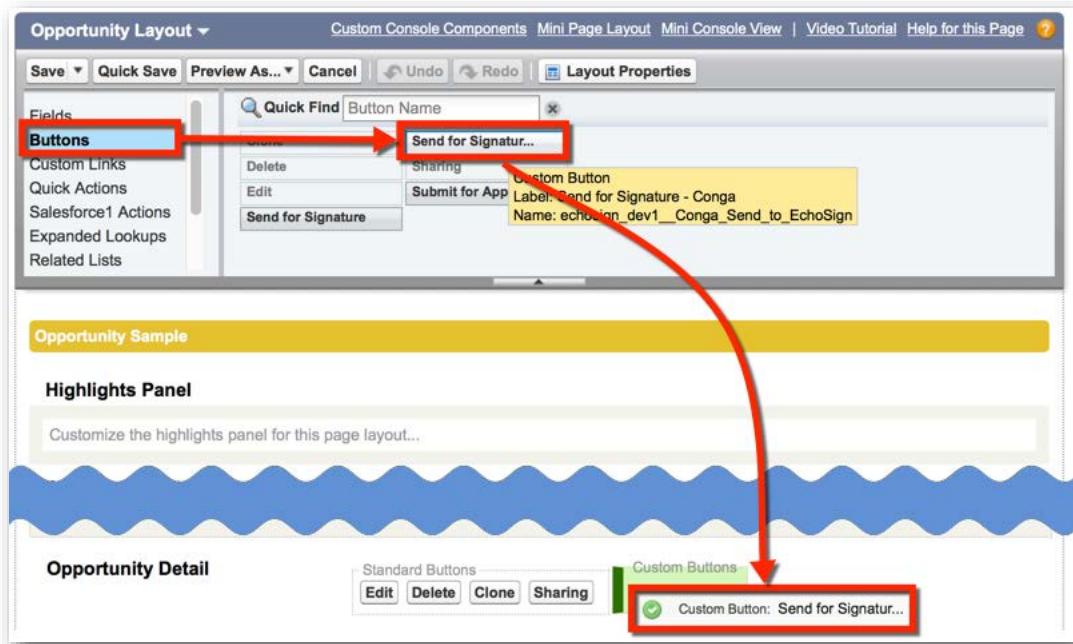
- e) Click **Save** to save your field mapping.

Enabling the 'Send for Signature' Button

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

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

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



Creating Custom 'Send for Signature' Buttons

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

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

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

The screenshot shows the 'Buttons, Links, and Actions' page for the 'Opportunity' object. At the top, there's a header with the object name and a 'Help for this Page' link. Below the header, a sub-header reads 'Buttons, Links, and Actions'. A toolbar below the sub-header includes buttons for 'New Action', 'New Button or Link', and 'Default Custom Links', along with a 'Buttons, Links, and Actions Help' link. The main content area contains a brief description: 'Use this page to manage buttons, links, and actions.'.

The *Custom Button or Link Edit* page displays.

The screenshot shows the 'Custom Button or Link Edit' page for the 'Opportunity' object. The page has a header 'Opportunity Custom Button or Link New Button or Link' and a 'Help for this Page' link. It features a 'Custom Button or Link Edit' form with several input fields:

- Label:** A text input field.
- Name:** A text input field with a help icon.
- Description:** A text input field.
- Display Type:** A radio button group with three options:
 - Detail Page Link [View example](#)
 - Detail Page Button [View example](#)
 - List Button [View example](#)
- Behavior:** A dropdown menu set to 'Display in new window' with a 'View Behavior Options' link.
- Content Source:** A dropdown menu set to 'URL'.

A 'Quick Tips' sidebar on the right lists:

- [Getting Started](#)
- [Sample Buttons & Links](#)
- [Operators & Functions](#)

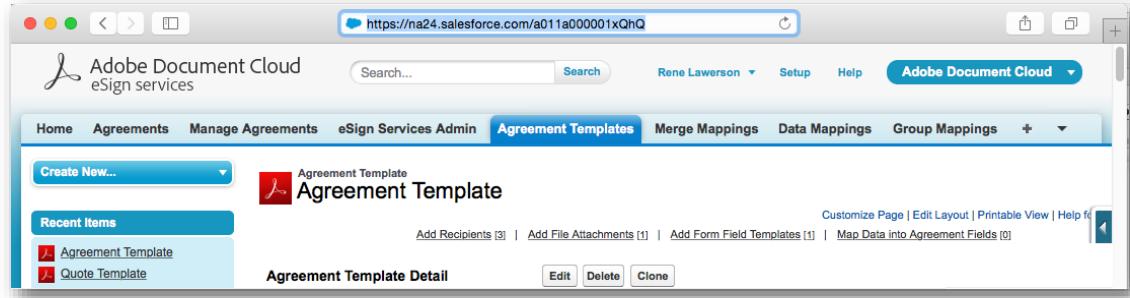
The main editing area has sections for 'Select Field Type' (set to 'Opportunity'), 'Insert Field' (with 'Insert Merge Field' and 'Insert Operator' buttons), and 'Functions' (a dropdown menu showing options like ABS, AND, BEGINS, etc.). At the bottom, there are 'Check Syntax' and 'Link Encoding' dropdowns, and a standard toolbar with 'Save', 'Quick Save', 'Preview', and 'Cancel' buttons.

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

(Optional) Associate a specific Agreement Template to button:

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

/apex/echosign_dev1__AgreementTemplateProcess?masterid={!Object.Id}&templateId=a011a0000
01xQhQ where **templateId** should be set to the specific ID of the agreement template that is to be used. If this value is not set, then the default agreement template will be used. You can get the templateId from the URL of the agreement template page:



(Optional) After button is clicked, send the user to a different page than the agreement page using retURL parameter.

Example: You can define a 'Send for Signature' button so that when clicked, it will bring the user to a specified URL or back to the record instead of going to the Agreement page. To define this button, use this string as an example:

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

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

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

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

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

4. Click the **Save** button.

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

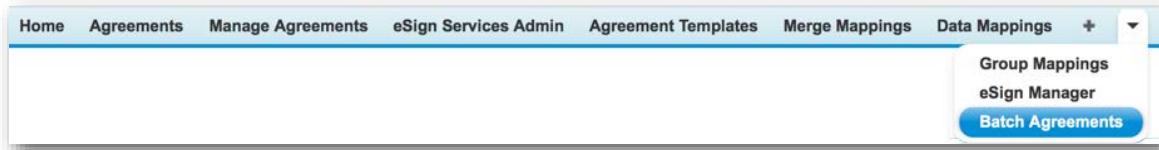
Working with Agreements In Batch (Key Feature)

Create Agreements in Batch

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

To create agreements in batch:

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



The *Create Agreements in Batch* page displays.

A screenshot of the 'Create Agreements in Batch' page. The page has a header 'Document Cloud Batch Agreements' and a title 'Create Agreements in Batch'. Below the title is a section titled 'Define Criteria for Creating Agreements'. It contains instructions: 'Select one of your pre-defined Agreement Templates that has a Master Object. Then enter a query to narrow the set of records in the Master Object. One Agreement record will be created for each Master Object record you specify in the query.' It also provides an example: 'Example: If your Master Object in the Agreement Template is Opportunity, then the query for all Opportunities would be SELECT Id from Opportunity. In this case for each Opportunity, one Agreement record will be created using the specified Agreement Template.' Below these instructions are two input fields: 'Select Agreement Template:' with a dropdown menu showing 'Agreement Template' and 'Master Object Type:' with a value 'opportunity'. There is also a 'Enter Records Query:' text area with a placeholder 'Query'. At the bottom of the page is a 'Create Agreements' button.

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

Select all opportunities

- o SELECT Id from Opportunity

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

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

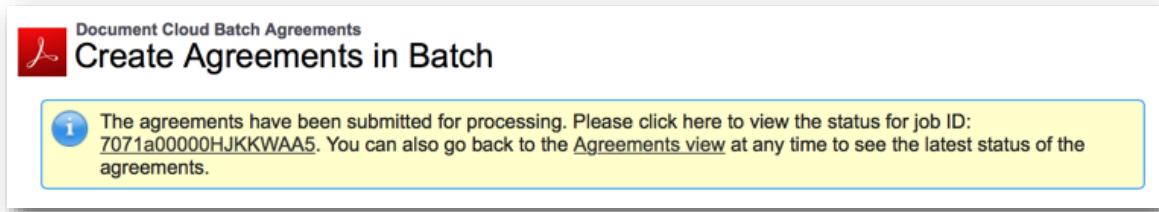
Select all contacts under accounts of type Prospect, created since yesterday and who have not opted out of emails.

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

Select all leads from a 2014 Dreamforce campaign

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

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



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



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

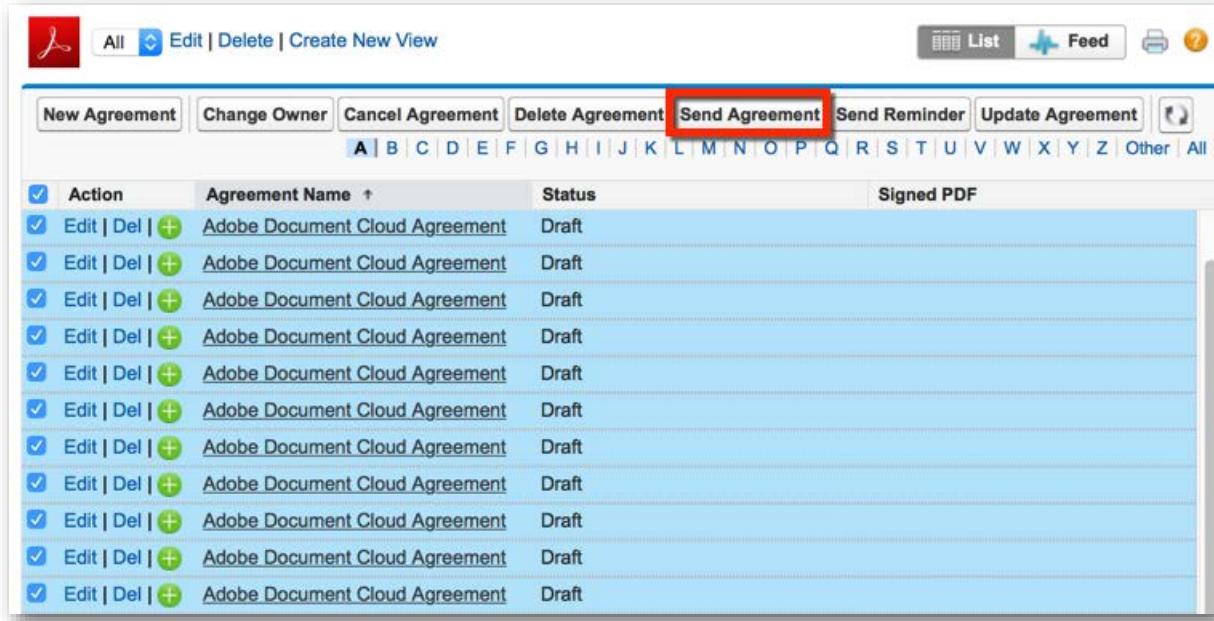
A screenshot of the Salesforce 'Agreements' list view. The top navigation bar shows 'Agreements' selected. Below the toolbar, there are buttons for 'New Agreement', 'Change Owner', 'Cancel Agreement', 'Delete Agreement', 'Send Agreement', 'Send Reminder', 'Update Agreement', and a 'List' button. A red box highlights the 'List' button. The main area is a table with columns: 'Action', 'Agreement Name', 'Status', and 'Signed PDF'. The table contains 10 rows, each representing an 'Adobe Document Cloud Agreement' in Draft status. Each row has a checkbox in the 'Action' column and edit/delete buttons in the 'Agreement Name' column.

Send and Manage Agreements in Batch

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

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

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



The screenshot shows a Salesforce application window for managing agreements. At the top, there is a toolbar with icons for 'All', 'Edit | Delete | Create New View', 'List', 'Feed', and a question mark. Below the toolbar is a navigation bar with links: 'New Agreement', 'Change Owner', 'Cancel Agreement', 'Delete Agreement', 'Send Agreement' (which is highlighted with a red box), 'Send Reminder', 'Update Agreement', and a refresh icon. A secondary navigation bar below the first one includes letters from A to Z and an 'Other | All' option. The main area is a table listing ten agreements, each with a checkmark in the 'Action' column, the name 'Adobe Document Cloud Agreement', and the status 'Draft'. The last column is labeled 'Signed PDF'.

Action	Agreement Name	Status	Signed PDF
✓ Edit Del +	Adobe Document Cloud Agreement	Draft	
✓ Edit Del +	Adobe Document Cloud Agreement	Draft	
✓ Edit Del +	Adobe Document Cloud Agreement	Draft	
✓ Edit Del +	Adobe Document Cloud Agreement	Draft	
✓ Edit Del +	Adobe Document Cloud Agreement	Draft	
✓ Edit Del +	Adobe Document Cloud Agreement	Draft	
✓ Edit Del +	Adobe Document Cloud Agreement	Draft	
✓ Edit Del +	Adobe Document Cloud Agreement	Draft	
✓ Edit Del +	Adobe Document Cloud Agreement	Draft	

Custom Settings and Customizations for Salesforce (Key Feature)

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

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

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

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

Default Organization Level Settings

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

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

The Custom Settings page displays.

The screenshot shows the Salesforce Custom Settings page. At the top, there is a header with the title "Custom Settings" and a "Help for this Page" link. Below the header, a message states "Percentage of custom settings data used: 0%" and "You are currently using 0 MB of custom settings data in your organization, out of an allowed limit of 2 MB." There is a "Create New View" button. The main area is a table with columns: Action, Label, Visibility, Settings Type, Namespace Prefix, Description, Record Size, Number of Records, and Total Size. The table lists several settings, all of which are of type "Hierarchy" and belong to the namespace "echosign_dev1". The "Document Cloud Settings" entry has a record size of 1,505 and 1 record, while others have 0 records.

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

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

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

3. Click the **Manage** button.

Custom Setting Definition
Document Cloud Settings

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail		Manage	
Label	Document Cloud Settings	Object Name	SIGN_Settings
API Name	echosign_dev1_SIGN_Settings_c	Setting Type	Hierarchy
Visibility	Public	Description	
Namespace Prefix	echosign_dev1	Created Date	4/23/2015 2:16 PM
Last Modified Date	4/23/2015 2:16 PM	Record Size	1,505

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

Custom Setting
Document Cloud Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

New

▼ Default Organization Level Value

View: All [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

Setup Owner	New	Location
No records to display.		

5. Update the appropriate settings.

6. Click the **Save** button.

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

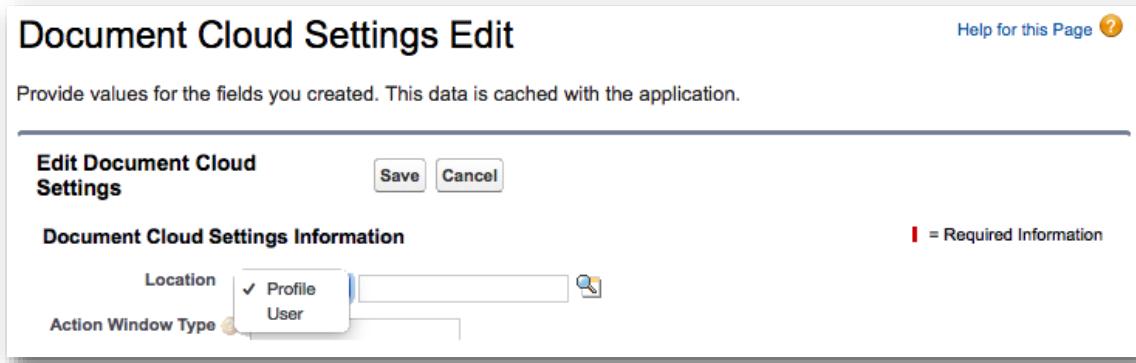
Settings for Specific Users and Profiles

Follow steps 1-4 above.

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

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

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



- Click the **Save** button.

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

Available Document Cloud Settings

Document Cloud Settings

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

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

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

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

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

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

Document Cloud Environment Settings

Environment settings allow you to control your environment.

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

Document Cloud Toolbar Settings

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

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

Document Cloud Merge Mapping Settings

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

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

Document Cloud Push Mapping Settings

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

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

Document Cloud Chatter Settings

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

Document Cloud Chatter Settings Edit Help for this Page ?

Provide values for the fields you created. This data is cached with the application.

Edit Document Cloud Chatter Settings Save Save & New Cancel

Document Cloud Chatter Settings Information = Required Information

Name	Chatter Settings	i
Post on Account Record	<input type="checkbox"/>	?
Post when Agreement Canceled	<input type="checkbox"/>	?
Post when Agreement Declined	<input type="checkbox"/>	?
Post when Agreement Expires	<input type="checkbox"/>	?
Post on Agreement Record	<input checked="" type="checkbox"/>	?
Post when Reminders Sent	<input type="checkbox"/>	?
Post when Agreement Sent	<input checked="" type="checkbox"/>	?
Send Notifications to Sign Agreements	<input checked="" type="checkbox"/>	?
Post when Agreement Signed or Approved	<input checked="" type="checkbox"/>	?
Post when Agreement Viewed	<input type="checkbox"/>	?
Post on Contract Record	<input type="checkbox"/>	?
Enable Document Cloud Chatter Updates	<input checked="" type="checkbox"/>	?
Post on Opportunity Record	<input type="checkbox"/>	?
Post when Recipient Email Bounces	<input checked="" type="checkbox"/>	?

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

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

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

Document Cloud Lead Conversion Settings

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

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

Adding Custom Fields and Related Objects To the Agreement page

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

Adding Custom Fields

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

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

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

Custom Objects

Custom objects are database tables that allow you to store data specific to your organization in salesforce build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and custom object data through the Force.com API.

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Add File Attachment	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Form Field Template	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Recipient	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Agreement	Adobe Document Cloud eSign Services		✓	

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

Custom Object
Agreement (Managed)

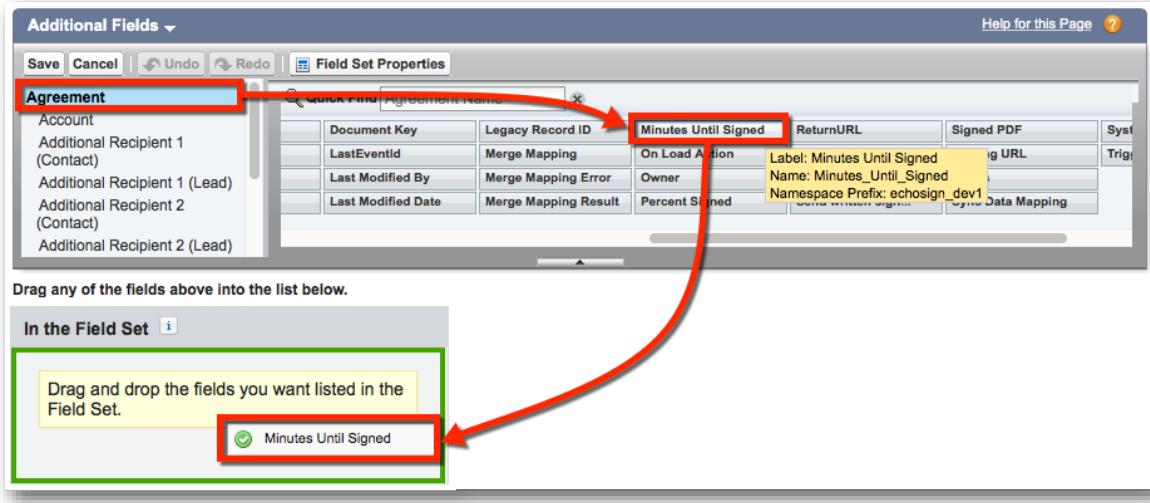
This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Standard Fields [4] | Custom Fields & Relationships [79] | Validation Rules [4] | Page Layouts [2] | **Field Sets [1]** | Compact Layouts [1] | Search Layouts [6] | Help for this Page ?

4. Click the **Edit Action**.

Field Sets					New	Field Sets Help ?
Action	Field Label	Installed Package	API Name	Where is this used?		
Edit	Additional Fields	Adobe Document Cloud eSign Services	echosign_dev1__AdditionalFieldSet	Use this to show any of the agreement fields not displayed by default by the Visualforce page.		

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



6. Click the **Save** button.

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

Adding Related Objects to the Agreement Page

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

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

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

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

Custom Objects

Custom objects are database tables that allow you to store data specific to your organization in salesforce build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and custom object data through the Force.com API.

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Add File Attachment	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Form Field Template	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Recipient	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Agreement	Adobe Document Cloud eSign Services		✓	

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

Custom Object
Agreement (Managed)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Standard Fields (4) | **Custom Fields & Relationships (79)** | Validation Rules (4) | Page Layouts (2) | Field Sets (1) | Compact Layouts (1) | Search Layouts (6) | Buttons, Links, and Actions (18) | Record Types (0) | Apex Sharing Reasons (0) | Apex Sharing Recalculation (0) | Object Limits (11)

4. Click the **New** button.

Custom Fields & Relationships

New [Field Dependencies](#)

Action	Field Label	API Name

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

Agreement
New Custom Field Help for this Page ?

Step 1. Choose the field type Step 1

Next **Cancel**

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a specific type of parent-child relationship between this object (the "child" or "detail") and another object (the "parent").

URL Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next **Cancel**

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

Agreement
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Step 2

Previous Next Cancel

Quote

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

Agreement
New Relationship

Step 3. Enter the label and name for the lookup field

Step 3 of 6

Previous Next Cancel

Field Label: Quote

Field Name: **Quote**

Description:

Help Text:

Child Relationship Name: Agreements

Required: Always require a value in this field in order to save a record.
 Clear the value of this field. You can't choose this option if you make this field required.
 Don't allow deletion of the lookup record that's part of a lookup relationship.

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

Previous Next Cancel

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

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

Agreement
New Relationship

Help for this Page ?

Step 6 of 6

Step 6. Add custom related lists

Field Label: Quote
Data Type: Lookup
Field Name: Quote
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label: Agreements

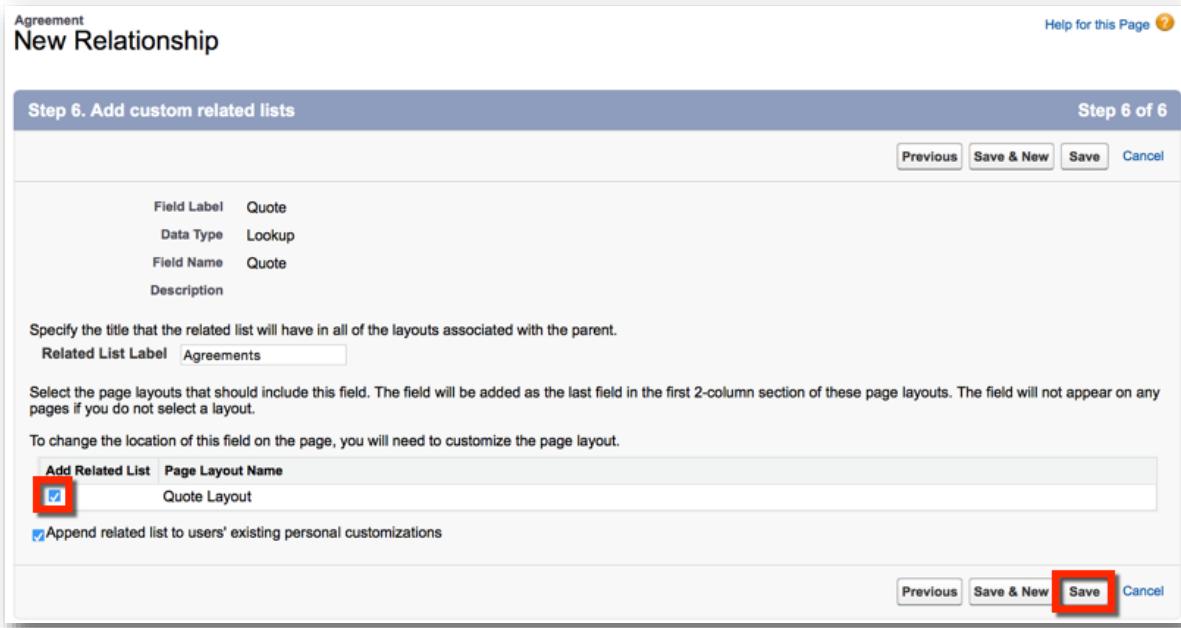
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List Page Layout Name
 Quote Layout

Append related list to users' existing personal customizations

Previous Save & New **Save** Cancel



eSign Services for Chatter (Key Feature)

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

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

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

You can also send agreements directly from Chatter Publisher Actions. [Find out more.](#)

The screenshot displays a Chatter feed interface. At the top, there is a profile picture of a user named Sam Carlsen. Below the profile picture, a message states: "GlobalCorp Client Services Agreement - TransDigital Opportunity has been sent to Sara Tran (saratran132@gmail.com) at company: TransDigital Account for signature." Underneath this message is a blue link labeled "GlobalCorp Client Services Agreement - TransDigital Opportunity" with the URL "/a0CI0000004r95TEAQ". Below the message are standard Chatter interaction buttons: "Comment" and "Like", followed by the timestamp "Today at 1:45 PM". A horizontal line separates this post from the next. The second post also features a profile picture of Sam Carlsen. The message reads: "GlobalCorp Client Services Agreement - TransDigital Opportunity has been viewed by Sara Tran (saratran132@gmail.com) at company: TransDigital Account." Below this message is another blue link with the same URL and timestamp "Today at 1:45 PM".

Setup Instructions for Chatter Status Updates

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

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

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

Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

Remote Site Edit		Save	Save & New	Cancel
Remote Site Name	<input type="text" value="Chatter_Settings"/>			
Remote Site URL	<input type="text" value="https://na24.salesforce.com/"/>			
Disable Protocol Security	<input type="checkbox"/> i			
Description	<input type="text"/>			
Active	<input checked="" type="checkbox"/>			
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>				

- d) Click the **Save** button.
3. Make sure also that Chatter feeds are enabled for the Agreement record by doing the following:
- Click **Setup** then navigate to **Build | Customize | Chatter | Feed Tracking**.
 - Click **Agreement**, then check the box *Enable Feed Tracking*.

Feed Tracking

Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.

Object	Tracked
Account	2 Fields
Add File Attachment	
Add Form Field Template	
Add Recipient	
Agreement	0 Fields
Agreement Event	
Agreement Template	

Fields in agreements

You can select up to 20 fields.

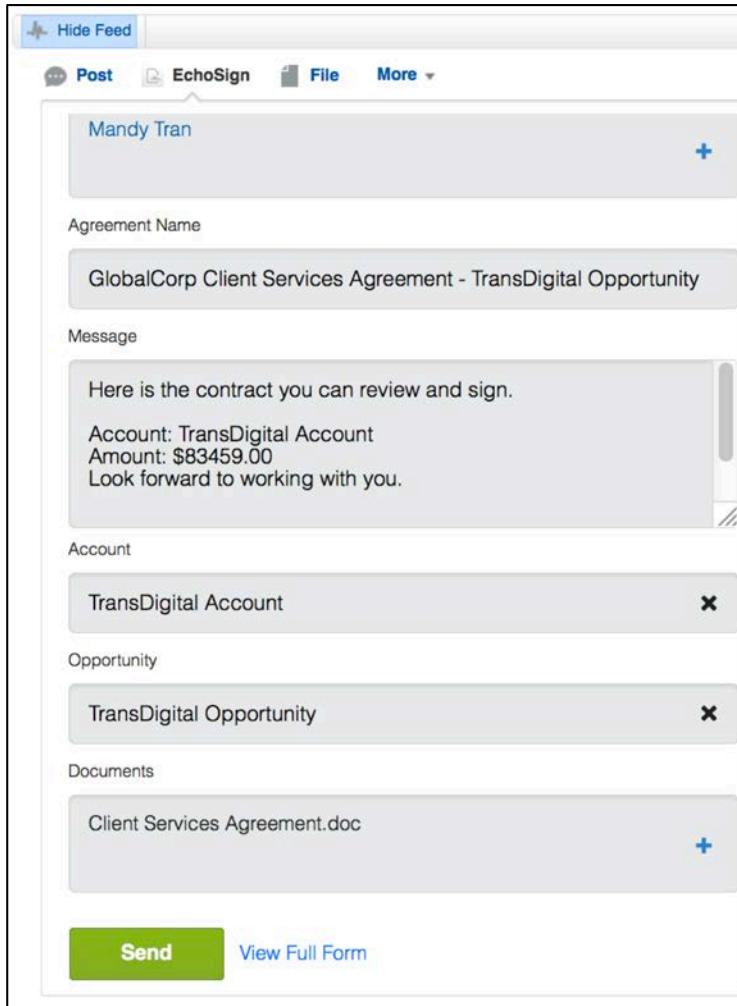
Account	Additional Options
<input type="checkbox"/> Additional Recipient 1 (Contact)	<input type="checkbox"/> Additional Recipient 1 (Lead)
<input type="checkbox"/> Additional Recipient 1 (User)	<input type="checkbox"/> Additional Recipient 2 (Contact)

- c) Click the **Save** button.

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

Send from Chatter

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



eSign Services for Salesforce1 Features (Key Feature)

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



Setting Up to Send Agreements from Salesforce1 Mobile

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

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

The screenshot shows the 'Salesforce1 Settings' page. In the 'Mobile Browser App Settings' section, the checkbox 'Enable the Salesforce1 mobile browser app' is checked and highlighted with a red box. Other sections visible include 'Downloadable App Settings' (unchecked), 'Account News Settings' (unchecked), 'Duplicate Rule Settings' (unchecked), and 'Device Access Settings' (checked). At the bottom are 'Save' and 'Cancel' buttons.

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

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

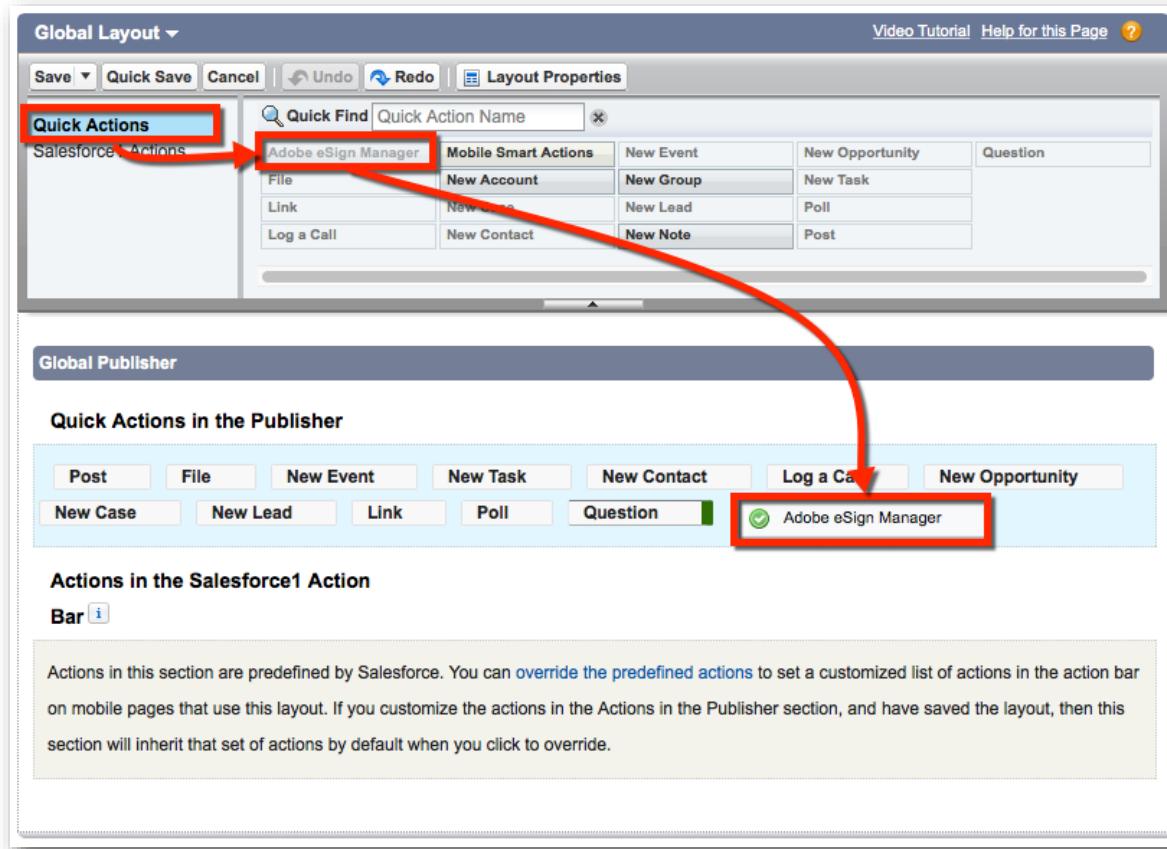
The screenshot shows the 'Global Actions' page. At the top right is a 'Help for this Page' link. Below it is a section titled 'Global Actions' containing two items: 'Create and manage global actions' and 'Create, manage, and assign global publisher layouts'. The second item is highlighted with a red rectangular box. Below this is a 'Getting Started' section with one item: 'Quick Actions Implementation Guide'.

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

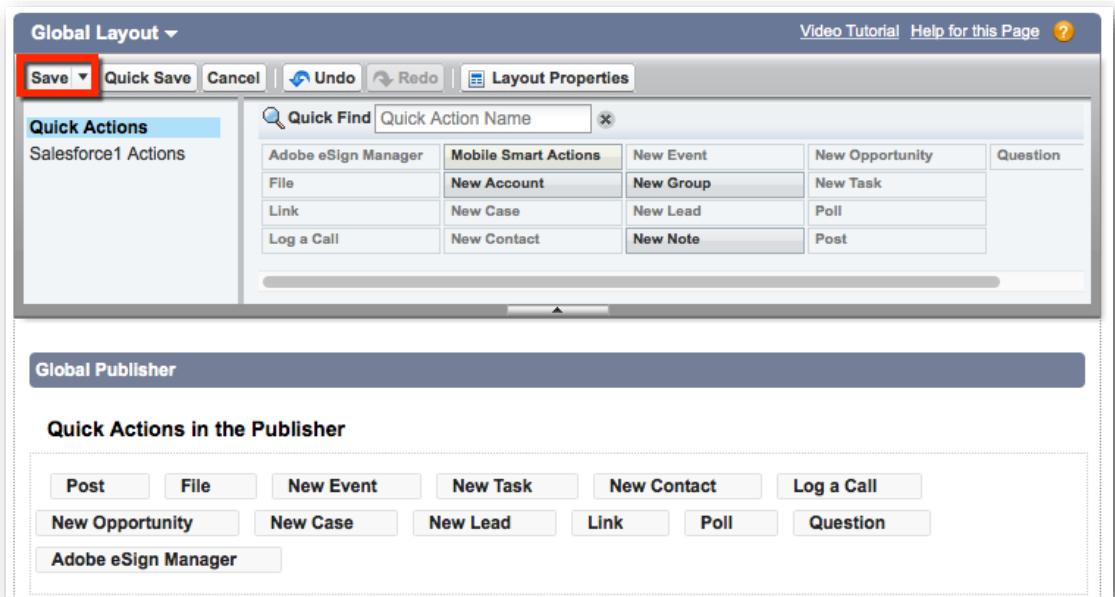
The screenshot shows the 'Global Publisher Layout' page. At the top right is a 'Help for this Page' link. Below it is a section titled 'Global Publisher Layouts' with a 'New' button and a 'Publisher Layout Assignment' button. A table follows, with the first column labeled 'Action' and containing 'Edit' and 'Del' buttons. The second column is 'Publisher Layout Name' with the value 'Global Layout'. The third column is 'Created By' with the value 'Rene Lawerson, 4/14/2015 1:48 PM'. The fourth column is 'Modified By' with the value 'Rene Lawerson, 4/14/2015 1:48 PM'. The 'Edit' button in the first row is highlighted with a red rectangular box.

Action	Publisher Layout Name	Created By	Modified By
Edit Del	Global Layout	Rene Lawerson, 4/14/2015 1:48 PM	Rene Lawerson, 4/14/2015 1:48 PM

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



- e) Click the **Save** button.



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

Opportunity Page Layout

Help for this Page ?

This page allows you to create different page layouts to display Opportunity data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Opportunity (Marketing) Layout	Rene Lawerson, 4/14/2015 1:48 PM	Rene Lawerson, 4/14/2015 1:48 PM	<input type="checkbox"/>
Edit Del	Opportunity (Sales) Layout	Rene Lawerson, 4/14/2015 1:48 PM	Rene Lawerson, 4/14/2015 1:48 PM	<input type="checkbox"/>
Edit Del	Opportunity (Support) Layout	Rene Lawerson, 4/14/2015 1:48 PM	Rene Lawerson, 4/14/2015 1:48 PM	<input type="checkbox"/>
Edit Del	Opportunity Layout	Rene Lawerson, 4/14/2015 1:48 PM	Rene Lawerson, 6/3/2015 8:12 PM	<input type="checkbox"/>

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

Opportunity Layout

Custom Console Components Mini Page Layout Mini Console View | Video Tutorial Help for this Page ?

Save ▾ Quick Save Preview As... ▾ Cancel Undo Redo Layout Properties

Fields Buttons Custom Links **Quick Actions** Salesforce1 Actions Expanded Lookups Related Lists

Quick Find Quick Action Name

Adobe eSign Manager	Log a Call	New Contact	New Note	Post
Adobe eSign Manager	Mobile Smart Actions	New Event	New Opportunity	Question

Label: Adobe eSign Manager
Name: Opportunity.echosign_dev1__EchoSign_Opportunity_Publisher_Action
Action Type: Custom Visualforce

Opportunity Sample

Highlights Panel

Customize the highlights panel for this page layout...

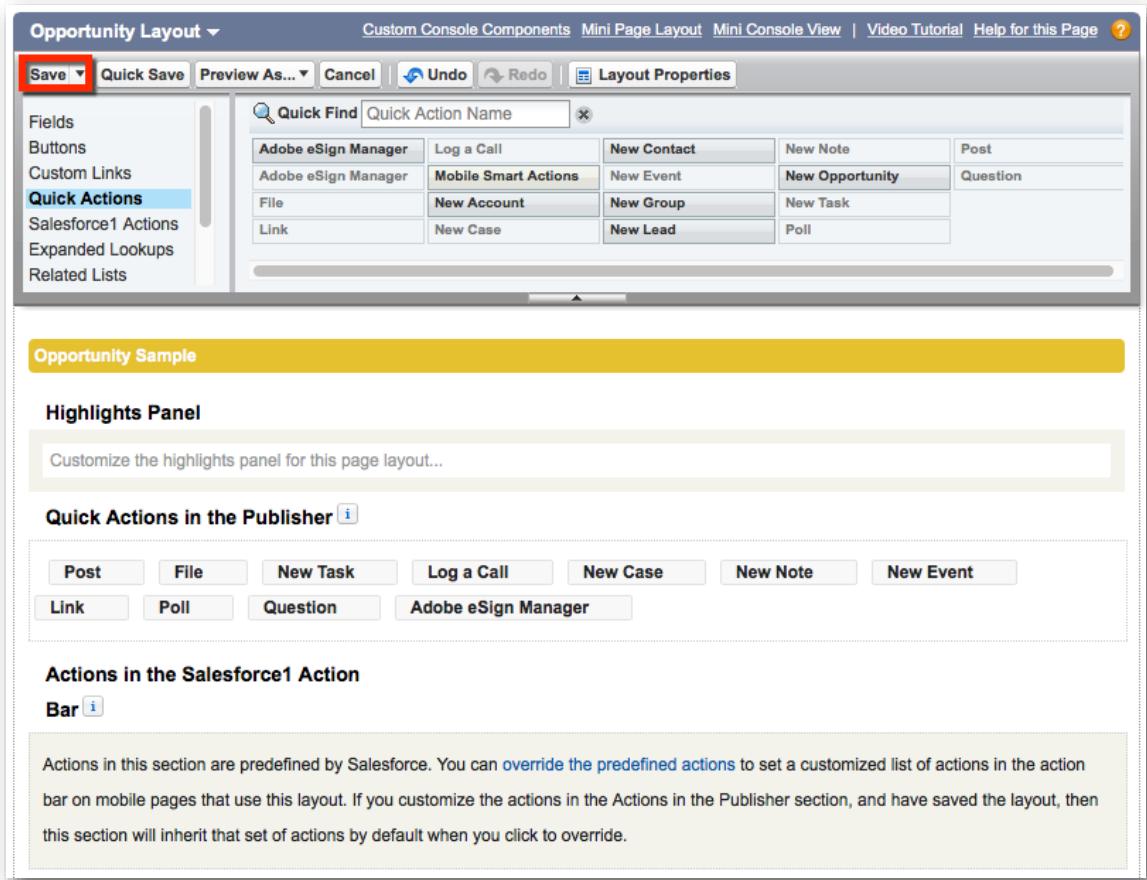
Quick Actions in the Publisher

Post	File	New Task	Log a Call	New Case	New Note	New Event
Link	Poll	Question	Adobe eSign Manager			

Actions in the Salesforce1 Action Bar

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions in the action bar on mobile pages that use this layout. If you customize the actions in the Actions in the Publisher section, and have saved the layout, then this section will inherit that set of actions by default when you click to override.

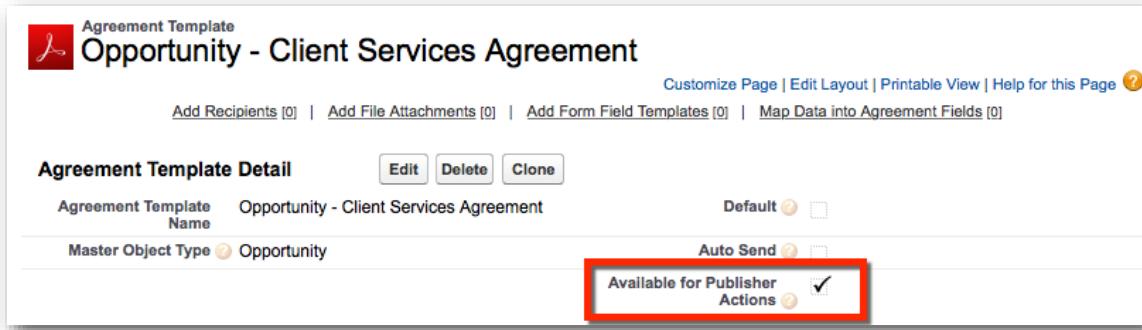
- d) Click the **Save** button.



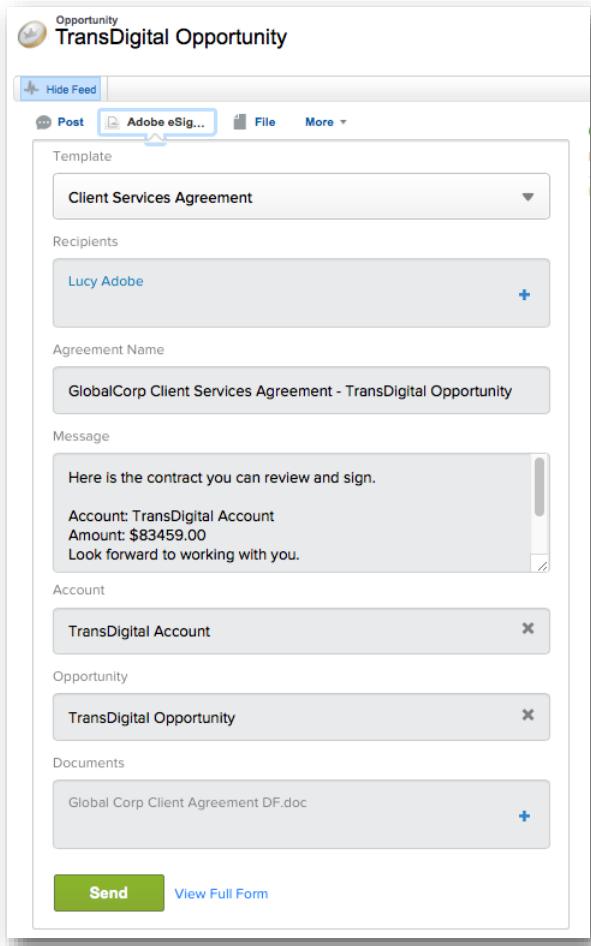
Using Agreement Templates with Publisher Send Action

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

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



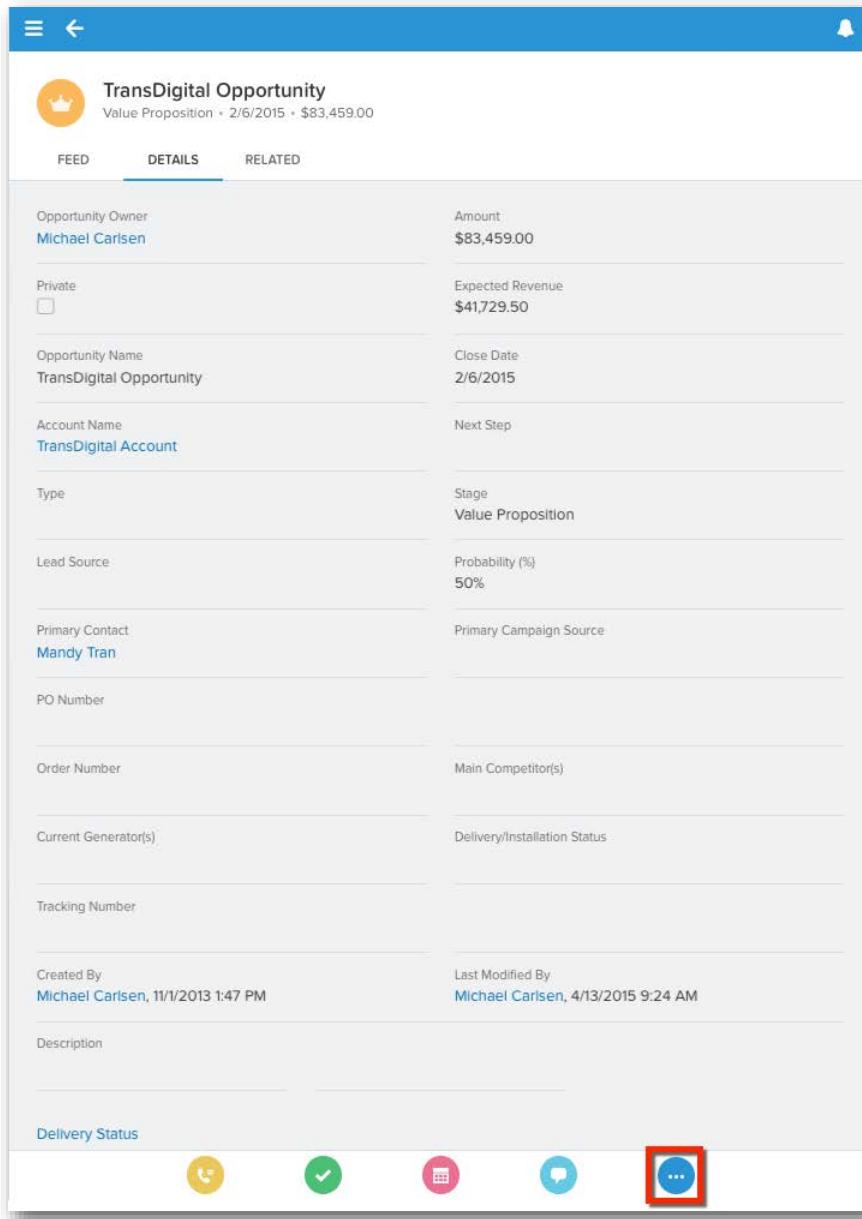
- If enabled, then when sending from the Adobe eSign Manager publisher action from the specified Master Object (e.g., Lead, Account, Contact, Opportunity, Contract), the agreement template will be available. If you have more than one agreement template enabled for that object, then there will be a dropdown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



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

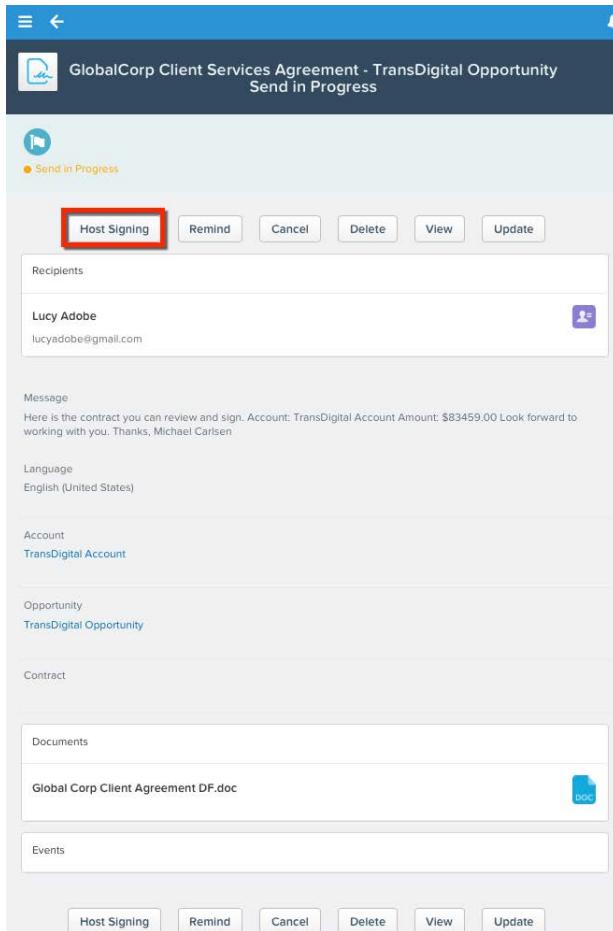
Using eSign Services Send Action from Salesforce1

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



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

The screenshot shows two overlapping windows. The background window is a 'TransDigital Opportunity' record in Salesforce. The foreground window is the 'Adobe eSign Manager' dialog box. The 'Adobe eSign Manager' button in the opportunity's action menu is highlighted with a red box. The dialog box shows the 'Client Services Agreement' template selected, a recipient 'Lucy Adobe', and a message about reviewing and signing the contract. A 'Save' button at the top right of the dialog box is also highlighted with a red box.



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

Adobe EchoSign

Get Help

GlobalCorp Client Services Agreement - T...

globalcorp CLIENT SERVICES AGREEMENT

Client Information

Company Name	TransDigital Account		
Address	11300 Main Street San Jose , CA 95110	Contact	Mandy Tran
Phone	(888) 888-8888	Email	mandytran132@gmail.com
Fax	(888) 333-6666	Website	http://www.transdigitalcorp.com
Order Number	3981904		

Client Services	Investment
New Customer Program	\$ 83459.00
• New client onramp • Survey evaluation • Set up properties and processes • Connect to vendor channels • Marketing services • Staff training • Customer service 24/7/365	

Enter Payment Information

PO Number

TERMS AND CONDITIONS

Terms and Renewal: The initial term of this Agreement is twelve (12) months, commencing upon the execution date of this Agreement. Thereafter, the Agreement will automatically renew in successive twelve (12) month terms unless either party gives written notice to the other at least sixty (60) days prior to the end of the then current term, stating its intent to terminate this Agreement.

Gold Standard of Service/60 Minute Guarantee: GlobalCorp guarantees to respond to any Company customer support request within sixty (60) minutes. This does not guarantee resolution of the request/problem only confirmation of the request. The guarantee only applies to GlobalCorp customer support communication. GlobalCorp provides customer support 24/7/365 at (800)-888-8888 or customerservice@GlobalCorp.com. If GlobalCorp fails to meet this guarantee, the

Place Your Signature

Jackson Parke

Jackson Parke

Advanced Signer Authentication Methods

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

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

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

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

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



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

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

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

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

Knowledge Based Authentication (KBA)

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

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

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



This Document Requires Identity Verification

After clicking "OK" below you will be presented with a list of questions designed to validate your identity.

First Name Last Name
Home Address
City State Zip Last 4 digits of your SSN
(Optional)

I agree to provide my personal information in order to validate my identity.
Identity verification powered by RSA. ([Privacy policy](#))

OK



This Document Requires Identity Verification

Please answer the following questions

Which of the following addresses have you ever been associated with?

1233 Swan Lake Drive
 173 Gentry Circle
 662 Compass Court
 728 Bucher Avenue
 771 North Fair Oaks Avenue
 I have never been associated with any of these addresses

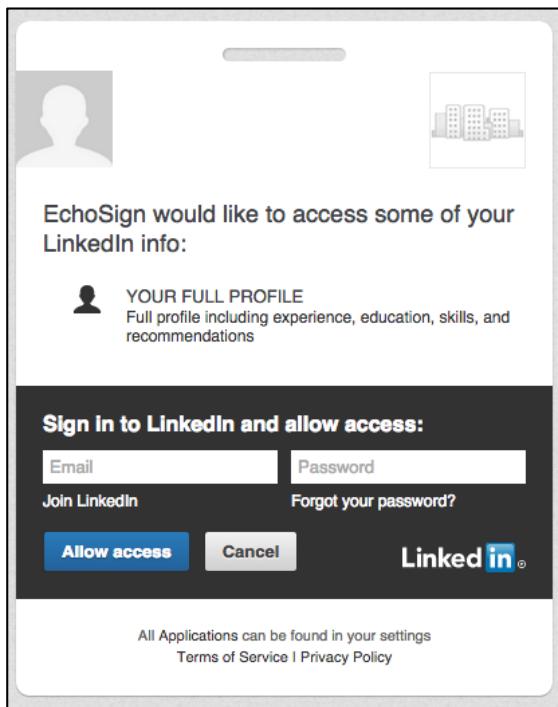
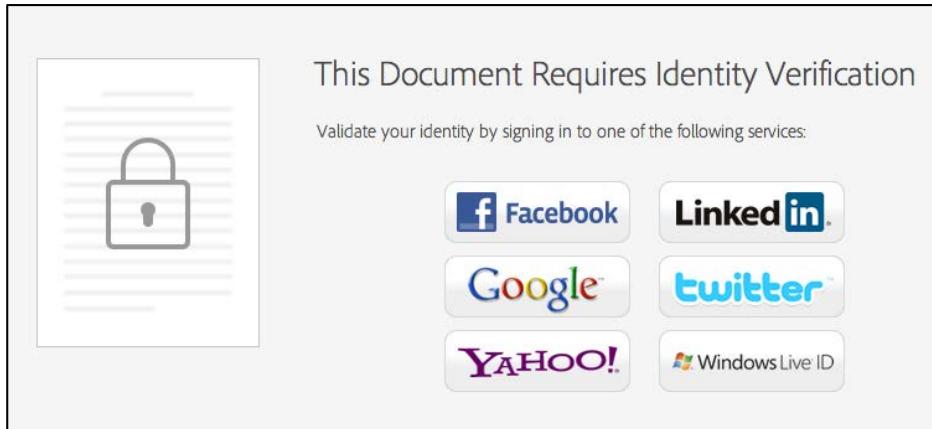
The addresses listed may be partial, misspelled or contain minor numbering variations from your actual address

OK

Social Identity Authentication

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

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



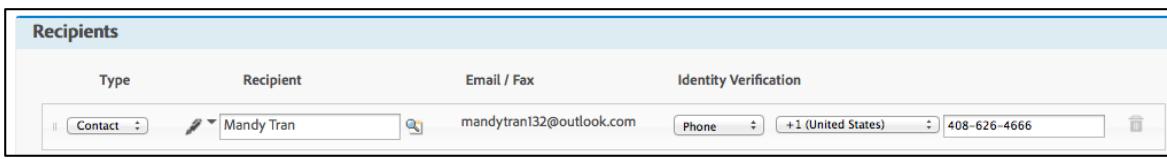
Phone Authentication

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

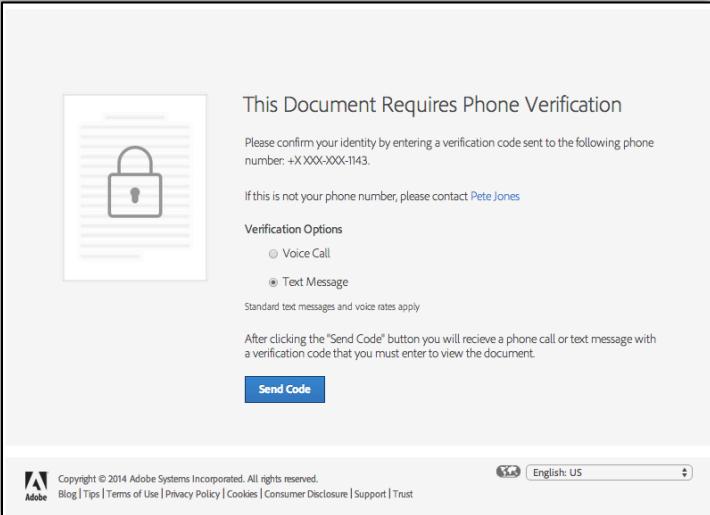
Signers will be prompted to enter a verification code before they can view and sign the agreement. They can request the send a verification code via voice or SMS text message to their phone number.

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

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



The screenshot shows the 'Recipients' section of the eSign interface. It includes columns for Type (Contact), Recipient (Mandy Tran), Email / Fax (mandytran132@outlook.com), and Identity Verification (Phone +1 (United States) 408-626-4666). A trash icon is also present.



This Document Requires Phone Verification

Please confirm your identity by entering a verification code sent to the following phone number: +X XXX-XXX-1143.

If this is not your phone number, please contact [Pete Jones](#).

Verification Options

Voice Call
 Text Message

Standard text messages and voice rates apply

After clicking the "Send Code" button you will receive a phone call or text message with a verification code that you must enter to view the document.

Send Code

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English: US

eSign Services Integration with other Salesforce Apps

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

Advanced Document Generation

- [Conga Composer](#)
- [Drawloop](#)
- [Thunderhead](#)

Subscriptions & Billing

- [Zuora](#)

Contract, Proposal, and Quote Management

- [Apttus](#)
- [BigMachines](#)
- [Selectica](#)
- [SpringCM](#)

Additional Customizations

Configure Salesforce to Send Large Documents for Signature

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

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

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

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

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

Setting Up and Configuring the EchoSign Callback Site

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

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

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



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

The fields should look like this:

The screenshot shows the 'Site Edit' page for creating a new site. The 'New Site' tab is selected. The configuration includes:

- Site Label:** EchoSign Callback
- Site Name:** EchoSign_Callback
- Site Description:** (Empty text area)
- Site Contact:** Rene Lawerson
- Default Web Address:** http://sitename-developer-edition.na24.force.com/ EchoSignCallback
- Active:** Checked
- Active Site Home Page:** EchoSignCallback
- Inactive Site Home Page:** InMaintenance [Preview]
- Site Template:** SiteTemplate
- Site Robots.txt:** (Empty text area)
- Site Favorite Icon:** (Empty text area)
- Analytics Tracking Code:** (Empty text area)
- URL Rewriter Class:** (Empty text area)
- Enable Feeds:** Unchecked
- Clickjack Protection Level:** Allow framing by the same origin only (recommended)
- Require Secure Connections (HTTPS):** Unchecked
- Guest Access to the Knowledge API:** Unchecked

At the bottom are 'Save' and 'Cancel' buttons.

4. Click **Save** to continue.

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

Action	Domain Name	Path	Site Primary Custom URL
Edit Delete View Preview as Admin	sitename-developer-edition.na24.force.com	/EchoSignCallback	

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

https://sitename-developer-edition.na24.force.com/EchoSignCallback

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

Adding the EchoSign Callback URL to Custom Settings

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

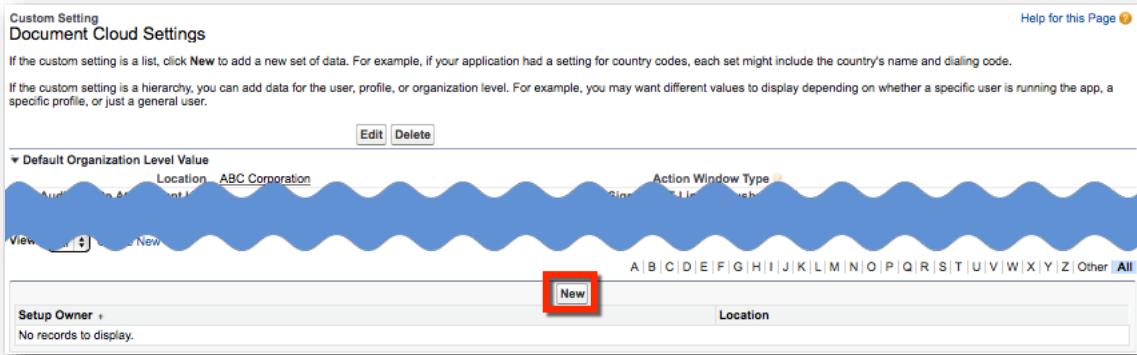
1. Click **Setup** then navigate to **Build | Develop | Custom Settings**.
2. Click the **Document Cloud Settings** link.

Manage	Document Cloud Settings	Public	Hierarchy	echosign_dev1	1,505	1
Manage	Document Cloud Toolbar Settings	Public	Hierarchy	echosign_dev1	250	0

- Click the Manage button.



- Click the New button.



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

Document Cloud Settings Edit

Provide values for the fields you created. This data is cached with the application.

Edit Document Cloud Settings		Save	Cancel
Document Cloud Settings Information			
Location	<input type="text" value="Profile"/>	<input type="button" value=""/>	<input type="button" value=""/>
Action Window Type	<input type="text"/>		
Add Audit PDF to Attachment List	<input type="checkbox"/>		
Add Signed PDF Link for Pushed Agreement	<input checked="" type="checkbox"/>		
Add Signed PDF as Separate Attachments	<input type="checkbox"/>		
Add Signed PDF for Pushed Agreements	<input checked="" type="checkbox"/>		
Add Supporting Files to Attachment List	<input type="checkbox"/>		
Allow Sending On Behalf of Others	<input type="checkbox"/>		
Auto-Sync Group Mappings	<input type="checkbox"/>		
Callback URL DC to Salesforce Site	<input type="text" value="https://.com/EchoSignCallback"/>		

- Click Save to save your settings.

Customizing the Profile for Your EchoSign Callback Site

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

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

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

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

The screenshot shows the 'Sites' list page. A single site entry is displayed: 'Sites (rrassoc-developer-edition.na24.force.com)'. The site details are as follows:

Action	Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Deactivate	EchoSign Callback	http://sitename-developer-edition.na24.force.com...		✓	Force.com	Rene Lawerson, 6/22/2015 10:24 AM

A red box highlights the 'EchoSign Callback' label in the Site Label column.

3. Click **Public Access Settings**.

The screenshot shows the 'Site Details' page for the 'EchoSign Callback' site. The 'Public Access Settings' tab is selected. The site details are as follows:

Site Label	EchoSign Callback	Site Name	EchoSign_Callback
Site Description		Site Contact	Rene Lawerson
Active	<input checked="" type="checkbox"/>	Login	Not Allowed
Active Site Home Page	echosign_dev1.EchoSignCallback [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	
Site Template	SiteTemplate [Preview]	Enable Feeds	<input type="checkbox"/>
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (recommended)	Require Secure Connections (HTTPS)	<input type="checkbox"/> ⓘ
Guest Access to the Knowledge API	<input type="checkbox"/> ⓘ		
Created By	Rene Lawerson, 6/22/2015 10:24 AM	Last Modified By	Rene Lawerson, 6/22/2015 10:24 AM

A red box highlights the 'Public Access Settings' tab at the bottom of the page.

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

EchoSign Callback Profile

Profile Overview

User License	Guest	Custom Profile
Created By	Rene Lawerson, 6/22/2015 10:24 AM	Last Modified By

Assigned Users

Apps

- Assigned Apps**: Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu
- Object Settings**: Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes

Then click **Edit**.

EchoSign Callback Profile

Profile Overview > **Apex Class Access**

Apex Class Access

Edit

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

Enable Apex Class Access

Select the Visualforce pages that you want to make accessible at this Force.com site.

Available Apex Classes

- MyProfilePageControllerTest
- SiteLoginController
- SiteLoginControllerTest
- SiteRegisterController
- SiteRegisterControllerTest
- echosign_dev1.AgreementMobileController
- echosign_dev1.AgreementTemplateBatch
- echosign_dev1.AgreementTemplateService
- echosign_dev1.AgreementTemplateServiceBatch
- echosign_dev1.AgreementTemplateVariable
- echosign_dev1.AgreementTemplateWebService
- echosign_dev1.ContentWrapper
- echosign_dev1.DocumentContent
- echosign_dev1.DocumentWrapper

Enabled Apex Classes

- echosign_dev1.AgreementAttachmentService

Buttons: Save, Cancel, Add (with right-pointing arrow), Remove

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

EchoSign Callback Profile

Profile Overview > **Apex Class Access**

Apex Class Access

Apex Class Name	Installed Package
echosign_dev1.AgreementAttachmentService	Adobe Document Cloud eSign Services

Buttons: Find Settings..., Edit Properties, Edit

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

The screenshot shows the 'Profile Overview' section of the EchoSign Callback Profile. It includes fields for 'User License' (Guest), 'Created By' (Rene Lawerson, 6/22/2015 10:24 AM), 'Custom Profile' (checked), and 'Last Modified By' (Rene Lawerson, 6/22/2015 10:24 AM). Below this is the 'Apps' section, which contains links for 'Assigned Apps', 'Assigned Connected Apps', and 'Object Settings'. The 'Object Settings' link is highlighted with a red box.

- Click **Agreements**.

The screenshot shows the 'Object Settings' page for the EchoSign Callback Profile. The 'All Object Settings' table has one row visible, where 'Agreements' is listed under 'Object Name' and 'No Access' is listed under 'Object Permissions'. The 'Agreements' row is highlighted with a red box.

- Click **Edit**.

The screenshot shows the 'Edit' page for the 'Agreements' object. The top navigation bar shows 'Profile Overview > Object Settings > Agreements'. The main area displays the 'Agreements' table with one row, and the 'Edit' button is highlighted with a red box.

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

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

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

Field Name	Read	Edit
Account	<input type="checkbox"/>	<input type="checkbox"/>
Additional Options	<input type="checkbox"/>	<input type="checkbox"/>
Attachment ID Order	<input type="checkbox"/>	<input type="checkbox"/>
Attachment Service Invocation Count	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Auto Update	<input type="checkbox"/>	<input type="checkbox"/>
Background Action	<input type="checkbox"/>	<input type="checkbox"/>

- f) Click **Save** to save both the Object Permissions and the Field Permissions.
g) Click **Profile Overview** to navigate back to the Profile page.

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

- a) Click the **Login IP Ranges** link.

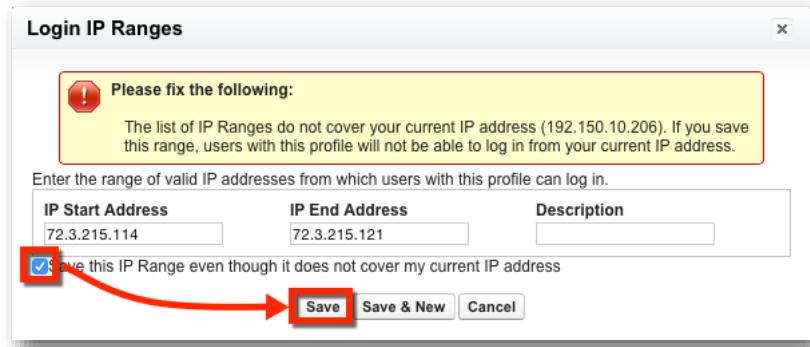
The screenshot shows the 'Profile Overview' section of the EchoSign Callback Profile. It includes fields for Description (empty), User License (Guest), Created By (Rene Lawerson, 6/22/2015 10:24 AM), Last Modified By (Rene Lawerson, 6/23/2015 7:34 PM), and a 'Custom Profile' checkbox which is checked. Below this is the 'Apps' section, which contains 'Assigned Apps' and 'Assigned Connected Apps'. Under 'System', there are sections for 'System Permissions' (Permissions to perform actions that apply across apps, such as "Modify All Data"), 'Login Hours' (Settings that control when users can log in), and 'Login IP Ranges' (Settings that control the IP addresses from which users can log in). The 'Login IP Ranges' link is highlighted with a red box.

- b) Click **Add IP Ranges**.

The screenshot shows the 'Login IP Ranges' section of the EchoSign Callback Profile. It has a header 'Login IP Ranges' and a button 'Add IP Ranges' which is highlighted with a red box. Below is a table with columns: Action, IP Start Address, IP End Address, and Description. The table currently has no data rows.

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

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



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

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

Action	IP Start Address	IP End Address	Description
Edit Delete	72.3.215.114	72.3.215.121	
Edit Delete	166.78.79.112	166.78.79.127	

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

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

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

Custom Objects

Custom objects are database tables that allow you to store data specific to your organization in salesforce build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and custom object data through the Force.com API.

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Add File Attachment	Adobe Document Cloud eSign Services	Agreement Template	<input checked="" type="checkbox"/>	
Edit	Add Form Field Template	Adobe Document Cloud eSign Services	Agreement Template	<input checked="" type="checkbox"/>	
Edit	Add Recipient	Adobe Document Cloud eSign Services	Agreement Template	<input checked="" type="checkbox"/>	
Edit	Agreement	Adobe Document Cloud eSign Services		<input checked="" type="checkbox"/>	

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

Custom Object
Agreement (Managed)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Help for this Page ?

Standard Fields [4] | **Custom Fields & Relationships [79]** | Validation Rules [4] | Page Layouts [2] | Field Sets [1] | Compact Layouts [1] | Search Layouts [6] | Buttons, Links, and Actions [18] | Record Types [0] | Apex Sharing Reasons [0] | Apex Sharing Recalculation [0] | Object Limits [11]

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

Custom Fields & Relationships

New Field Dependencies

Action	Field Label	API Name
Edit	Account	echosign_dev1__Account__c
Edit	Additional Options	echosign_dev1__AdditionalOptions__c
Edit	Additional Recipient 1 (Contact)	echosign_dev1__Recipient2__c
Edit Replace	Agreement Status	echosign_dev1__Status__c
Edit	Attachment ID Order	echosign_dev1__Attachment_ID_Order__c
Edit	Attachment Service Invocation Count	echosign_dev1__Attachment_Service_Invocation_Count__c

5. Click the Set Field-Level Security button.

The screenshot shows the 'Custom Field Definition Detail' page for a managed custom field named 'Attachment Service Invocation Count'. A yellow banner at the top states: 'This Custom Field Definition is managed, meaning that you may only edit certain attributes.' Below the banner, there are tabs for 'Edit', 'Set Field-Level Security' (which is highlighted with a red box), and 'View Field Accessibility'. A link to 'Validation Rules [0]' is also present.

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

The screenshot shows the 'Set Field-Level Security' page for the same custom field. It displays a table titled 'Field-Level Security for Profile' with two columns: 'Visible' and 'Read-Only'. Both columns have a checked checkbox at the top level. The table lists various user profiles, each with a checked checkbox in both columns, indicating that the field is visible and read-only for all listed profiles.

Field-Level Security for Profile	Visible	Read-Only
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gold Partner User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner Community Login User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner Community User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silver Partner User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard Platform User Clone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Admin Clone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work.com Only User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7. Click the **Save** button.

Manage Group Mappings

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

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

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

The screenshot shows the 'Document Cloud Group Mappings' page within the 'Group Mappings' tab of the eSign Services Admin interface. The top navigation bar includes links for Home, Agreements, Manage Agreements, eSign Services Admin, Agreement Templates, Merge Mappings, Data Mappings, and Group Mappings. A 'Create Now...' button is visible on the left. The main content area has a header 'Document Cloud eSign services Group Mappings Editor' with buttons for Sync Users, Preview Updates, Save, and Cancel. A note below the header explains that it sets up mappings for Document Cloud groups for Salesforce users. Below this is a 'Create a New Document Cloud Group' section with a 'Group Name:' input field and a 'Create' button. At the bottom is a 'Group Mappings' table with columns for Sync Selection, Salesforce Profile, and Document Cloud Group. It lists two profiles: 'Authenticated Website' and 'Chatter External User', both mapped to the 'Default Group'.

Move Users to Different Adobe Document Cloud Groups

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

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

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

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

Auto-Sync Users When Salesforce Profile Changes

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

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

Document Cloud Settings Edit Help for this Page 

Provide values for the fields you created. This data is cached with the application.

Edit Document Cloud Settings **Save** **Cancel**

Document Cloud Settings Information = Required Information

Location	ABC Corporation
Action Window Type	<input type="text"/>
Add Audit PDF to Attachment List	<input type="checkbox"/>
Add Signed PDF Link for Pushed Agreement	<input checked="" type="checkbox"/>
Add Signed PDF as Separate Attachments	<input type="checkbox"/>
Add Signed PDF for Pushed Agreements	<input checked="" type="checkbox"/>
Add Supporting Files to Attachment List	<input type="checkbox"/>
Allow Sending On Behalf of Others	<input type="checkbox"/>
Auto-Sync Group Mappings	<input checked="" type="checkbox"/>

Manually Sync Users

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

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

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

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

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

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

Updating Salesforce with Push Agreements

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

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

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

To enable this scenario, follow the following steps:

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

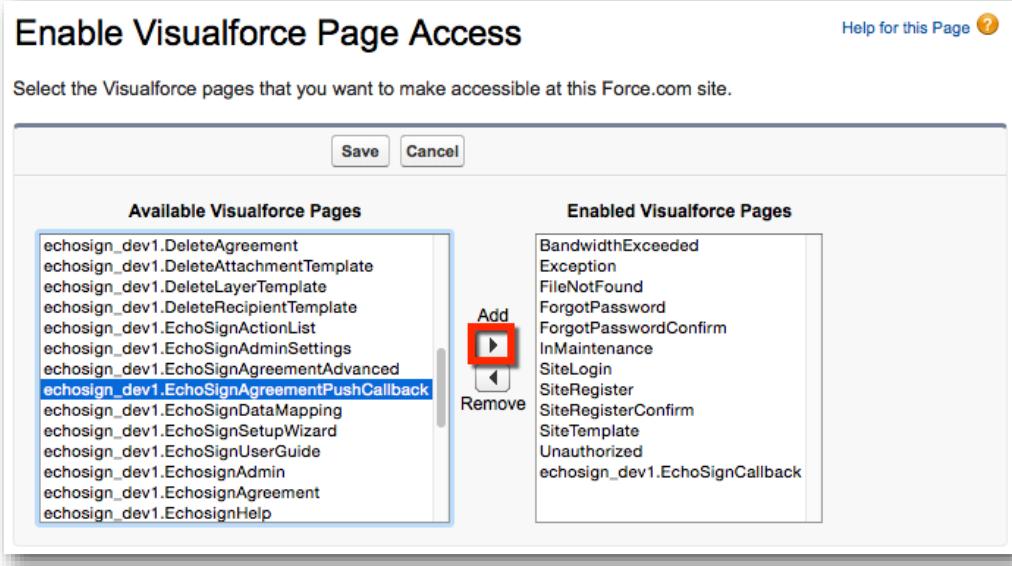
The screenshot shows the Salesforce 'Sites' list page. At the top, there's a header with 'Sites' and a 'Help for this Page' link. Below the header is a section titled 'What is a Site?'. The main area displays a table of sites. One row is highlighted, showing the following details:

Action	Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
Edit Deactivate	EchoSign Callback	http://sitename-developer-edition.na24.force.com...		✓	Force.com	Rene Lawerson, 6/22/2015 10:24 AM

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

The screenshot shows the 'Site Visualforce Pages' edit page. At the top, there's a header with 'Site Visualforce Pages' and an 'Edit' button, which is highlighted with a red box. To the right of the button is a link 'Enabled Visualforce Page Access Help' with a question mark icon.

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



6. Click **Save**.

- If you would like all of the agreements in your account that were sent outside of EchoSign to be created and pushed into Salesforce, follow these instructions:
 - Copy the secure URL address from the EchoSign Callback Site you created and append '/echosign_dev1_EchoSignAgreementPushCallback' to compose the callback URL. Contact Adobe Support (echosign@support.com) and provide them with your callback URL to set as your eSign services account's default callback URL. For example: If your site address is '<https://echov11-developer-edition.na12.force.com/EchoSignCallback>', the callback URL will be 'https://echov11-developer-edition.na12.force.com/EchoSignCallback/echosign_dev1_EchoSignAgreementPushCallback'
 - Adobe Support should also enter your EchoSign userID for the default callback URL API user setting. All accounts using Salesforce should also have their accounts set to append the document key to the callback URL.
- If you are sending agreements via the API, follow these instructions:
 - Copy the secure URL address from the EchoSign Callback Site you created and append '/echosign_dev1_EchoSignAgreementPushCallback' to create the callback URL to be used in the EchoSign API.
 - For example: If your site address is '<https://echov11-developer-edition.na12.force.com/EchoSignCallback>', the URL you should use in the Adobe Document Cloud eSign API will be 'https://echov11-developer-edition.na12.force.com/EchoSignCallback/echosign_dev1_EchoSignAgreementPushCallback'
 - When sending an agreement or creating a widget through the API you will need to provide a callback URL (see <https://secure.echosign.com/redirect/latestApiMethods> and reference the API parameter 'CallbackInfo'.)
 - Also make sure that your account settings are set to append the document key to the callback URL that should be the default for Salesforce customers using eSign services. For any issues, contact Adobe support at support@echosign.com.

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

Automation and Background Actions

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

Background Actions

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

Enabling 'Send on Behalf of' Functionality

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

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

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

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

- b) Click the **Manage** button.

Custom Setting Definition
Document Cloud Settings

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail		Manage	
Label	Document Cloud Settings	Object Name	SIGN_Settings
API Name	echosign_dev1__SIGN_Settings__c	Setting Type	Hierarchy
Visibility	Public	Description	
Namespace Prefix	echosign_dev1	Created Date	4/23/2015 2:16 PM
Last Modified Date	4/23/2015 2:16 PM	Record Size	1,505

- c) Click the **Edit** button.

Custom Setting
Document Cloud Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

Edit **Delete**

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

Document Cloud Settings Edit

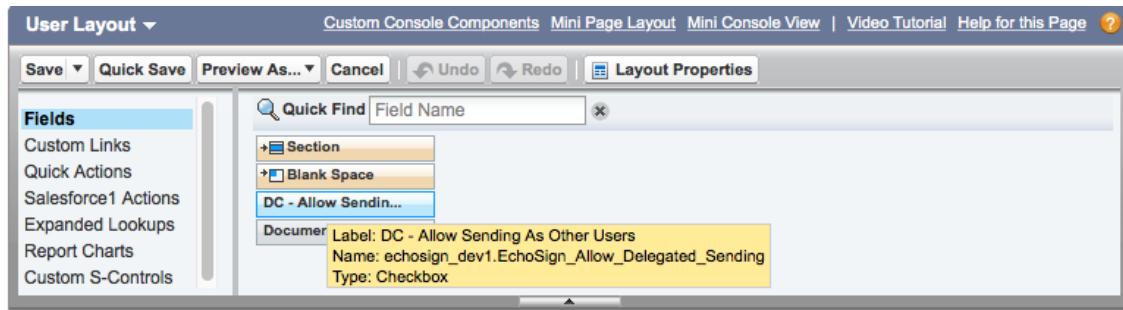
Provide values for the fields you created. This data is cached with the application.

Edit Document Cloud Settings		Save	Cancel
Document Cloud Settings Information			
Location	ABC Corporation		
Action Window Type	<input type="text"/>		
Add Audit PDF to Attachment List	<input type="checkbox"/>		
Add Signed PDF Link for Pushed Agreement	<input checked="" type="checkbox"/>		
Add Signed PDF as Separate Attachments	<input type="checkbox"/>		
Add Signed PDF for Pushed Agreements	<input checked="" type="checkbox"/>		
Add Supporting Files to Attachment List	<input type="checkbox"/>		
Allow Sending On Behalf of Others	<input checked="" type="checkbox"/>		

- e) Click the **Save** button.

2. Add the 'DC – Allow Sending as Other Users' field to the User record layout by doing the following:
 - a) Click **Setup** then navigate to **Build | Customize | Users | Page Layouts**.
 - b) Click the **Edit** Action next to User Layout.

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



- d) Click the **Save** button.
3. For the specific user that you want to send on behalf of, you must enable 'DC – Allow Sending as Other Users' option as follows:
- Click **Setup** then navigate to **Administer | Manager Users | Users**.
 - Click the **Edit** Action for the specific user.
 - In the *User Edit* page, Additional Information section, enable the **DC – Allow Sending as Other Users** option.
 - Click the **Save** button.
4. Add the 'Send On Behalf Of Others' field to the Agreement page layout by doing the following:
- Click **Setup** then navigate to **Build | Create | Objects**.
 - Click the **Agreement** link.

The screenshot shows the 'Custom Objects' page. It has a table with columns: Action, Label, Installed Package, Master Object, Deployed, and Description. One row is highlighted with a red box around the 'Label' column, which contains 'Agreement'.

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Add File Attachment	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Form Field Template	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Recipient	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Agreement	Adobe Document Cloud eSign Services		✓	

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

The screenshot shows the 'Custom Object' page for 'Agreement (Managed)'. At the top, it says 'This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)'. Below that, there are several navigation links: Standard Fields [4], Custom Fields & Relationships [79], Validation Rules [4], Page Layouts [2], **Field Sets [1]** (which is highlighted with a red box), Compact Layouts [1], and Search Layouts [6].

- d) Click the **Edit** Action.

Action	Field Label	Installed Package	API Name	Where is this used?
Edit	Additional Fields	Adobe Document Cloud eSign Services	echosign_dev1__AdditionalFieldSet	Use this to show any of the agreement fields not displayed by default by the Visualforce page.

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

Legacy Record ID	Minutes Until Signed	ReturnURLText	Signed PDF	System M...
Merge Mapping	On Load Action	ReturnURLText	Signed PDF	System M...
Merge Mapping Error	Owner	Send On Behalf Of	Status	Trigger D...
Merge Mapping Result	Percent Signed	Send with...	Label: Send On Behalf Of	

Drag any of the fields above into the list below.

In the Field Set

Drag and drop the fields you want listed in the Field Set.

- Send On Behalf Of

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

onLoadactions

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

Example of URLs with `onLoadAction`:

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

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

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

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

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

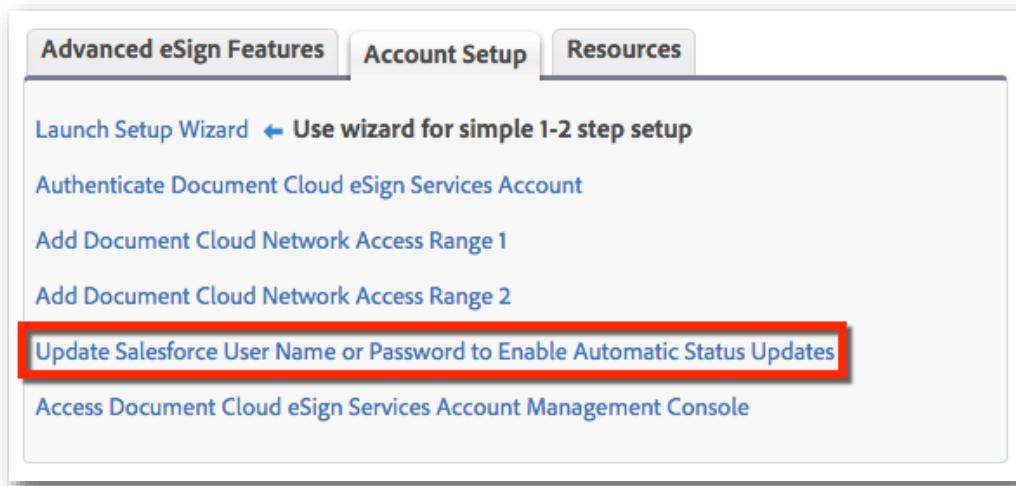
Granting Access to Additional Profiles

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

Updating Email Addresses or Passwords

Administrator Salesforce Account Password Changes

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



User Email Address Changes

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

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

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

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

Adding Fields to the 'Agreements Layout Professional' Page Layout

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

The screenshot shows the 'Custom Objects' page in Salesforce. At the top, there are two buttons: 'New Custom Object' and 'Schema Builder'. Below is a table with columns: Action, Label, Installed Package, Master Object, Deployed, and Description. There are four rows:

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Add File Attachment	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Form Field Template	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Recipient	Adobe Document Cloud eSign Services	Agreement Template	✓	

A fifth row is partially visible below the table. The 'Label' column for this row contains 'Agreement' with a red box around it, indicating it is the object being selected.

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

The screenshot shows the 'Agreement (Managed)' page. At the top, there is a message: 'This Custom Object Definition is managed, meaning that you may only edit certain attributes. Display More Information'. Below the message is a navigation bar with links: Standard Fields [4], Custom Fields & Relationships [79], Validation Rules [4], Page Layouts [2] (which is highlighted with a red box), Field Sets [1], Compact Layouts [1], Search Layouts [6], Buttons, Links, and Actions [18], Record Types [0], Apex Sharing Reasons [0], Apex Sharing Recalculation [0], and Object Limits [11].

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

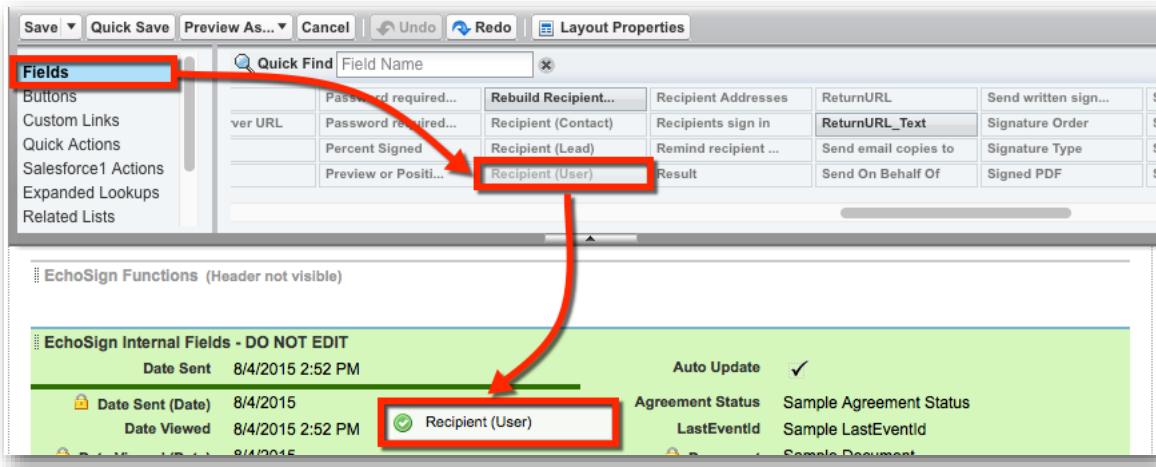
The screenshot shows the 'Page Layouts' page. At the top, there are 'New' and 'Page Layout Assignment' buttons. Below is a table with columns: Action, Page Layout Name, and Installed Package. There are two rows:

Action	Page Layout Name	Installed Package
Edit Del	Agreement Layout Enterprise / Unlimited	Adobe Document Cloud eSign Services
Edit Del	Agreement Layout Professional	Adobe Document Cloud eSign Services

The 'Edit' button for the 'Agreement Layout Professional' row is highlighted with a red box.

5. With **Fields** selected, click to drag and drop to the page layout each of the following fields:

- Recipient (User)
- Additional Recipient 1 (User)
- Additional Recipient 2 (User)
- Additional Recipient 3 (User)
- Enable Automatic Reminders
- Recipient Addresses
- Merge



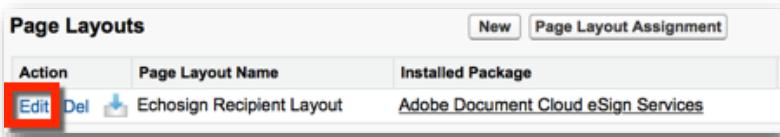
6. Click the **Save** button.

Adding Fields to the Recipient Page Layout

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



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



5. With **Fields** selected, click to drag and drop each of the following fields to the page layout:

- Agreement
- Contact
- Email Address
- Lead

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

6. Click the **Save** button.

Select Agreements Page Style (Advanced or Basic)

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

The 'Agreement Advanced' Page Style (Default)

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

The 'Agreement Basic' Page Style

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

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

- [Setting the 'Agreement Basic' page layout](#)
- [Setting up the Agreement buttons to work for your page layout](#)

Setting the 'Agreement Basic' Page Style

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

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

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

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

The screenshot shows the 'Custom Objects' page in Salesforce. At the top, there are tabs for 'New Custom Object' and 'Schema Builder'. Below is a table with columns: Action, Label, Installed Package, Master Object, Deployed, and Description. There are five rows:

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Add File Attachment	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Form Field Template	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Recipient	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Agreement	Adobe Document Cloud eSign Services		✓	

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

The screenshot shows the 'Page Layouts' section for the 'Agreement (Managed)' custom object. At the top, it says 'This Custom Object Definition is managed, meaning that you may only edit certain attributes.' Below is a navigation bar with links: Standard Fields [4], Custom Fields & Relationships [79], Validation Rules [4], Page Layouts [2] (which is highlighted), Field Sets [1], Compact Layouts [1], Search Layouts [6], Buttons, Links, and Actions [18], Record Types [0], Apex Sharing Reasons [0], Apex Sharing Recalculation [0], and Object Limits [11].

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

The screenshot shows the 'Page Layout Assignment' section for the 'Agreement' custom object. At the top, there are buttons for 'New' and 'Page Layout Assignment' (which is highlighted). Below is a table with columns: Action, Page Layout Name, Installed Package, Created By, Modified By, and Feed-Based Layout. A red box highlights the 'Page Layout Assignment' button.

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

The screenshot shows the 'Page Layout Assignment' details page for the 'Agreement' custom object. At the top, it says 'The table below shows the page layout assignments for different profiles.' Below is a table with a single row containing a button labeled 'Edit Assignment' (which is highlighted with a red box).

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

Edit Page Layout Assignment
Agreement

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Page Layout To Use: -- Select Page Layout -- **25 Selected** **0 Changed**

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

Edit Page Layout Assignment
Agreement

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Profiles	Page Layout
Chatter Free User	Agreement Layout Professional
Chatter Moderator User	Agreement Layout Professional
Contract Manager	Agreement Layout Professional
Cross Org Data Proxy User	Agreement Layout Professional
Customer Relationship Manager Lead	Agreement Layout Professional
Customer Relationship Manager Opportunity	Agreement Layout Professional
Customer Relationship Manager Record	Agreement Layout Professional
Customer Relationship Manager Task	Agreement Layout Professional
Standard User	Agreement Layout Professional
System Admin Clone	Agreement Layout Professional
System Administrator	Agreement Layout Professional
Work.com Only User	Agreement Layout Professional

Page Layout To Use: -- Select Page Layout -- **25 Selected** **0 Changed**

Save **Cancel**

Setting Up the Agreements Buttons to Work for Your Page Style

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

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

The screenshot shows the 'Custom Objects' page with the 'Agreement' object selected. The 'Actions' column contains links like 'Edit', 'Add File Attachment', 'Add Form Field Template', 'Add Recipient', and 'Agreement'. The 'Label' column shows the corresponding labels. The 'Description' column indicates if the action is deployed or not. The 'Agreement' link in the 'Actions' column is highlighted with a red box.

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

The screenshot shows the 'Buttons, Links, and Actions' page for the 'Agreement (Managed)' object. A message bar at the top states: 'This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)'. Below the message bar, there are several navigation links: Standard Fields [4], Custom Fields & Relationships [79], Validation Rules [4], Page Layouts [2], Field Sets [1], Compact Layouts [1], Search Layouts [6], Buttons, Links, and Actions [18] (which is highlighted with a red box), Record Types [0], Apex Sharing Reasons [0], Apex Sharing Recalculation [0], and Object Limits [11].

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

The screenshot shows the 'Buttons, Links, and Actions' page with the 'New' button selected. The 'Edit' action next to the 'New' button is highlighted with a red box. The table lists various actions such as Accept, Tab, Cancel Agreement, Clone, Delete, Delete Agreement, Delete Agreement Bulk, Edit, List, and New.

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

Override Standard Button or Link
New

Overriding standard buttons and links changes the meaning of the salesforce.com URL and any calls to that URL such as a salesforce.com page, a browser shortcut, or an external system. You can replace the salesforce.com URL for a standard button or link with a custom s-control or Visualforce Page.

Select the custom s-control or Visualforce Page to use in place of the salesforce.com URL for this standard button or link.

Override Properties		Save	Cancel
Label	New		
Name	New		
Default	EchoSign Agreement Advanced (Visualforce Page, Package: Adobe Document Cloud eSign Services)		
Override With	<input type="radio"/> No Override (use default) <input checked="" type="radio"/> Standard Salesforce.com Page <input type="radio"/> Custom S-Control --None-- <input type="radio"/> Visualforce Page --None--		
Comment	<div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

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

- a) Click the **Edit** Action next to *Edit*.
 b) Enable the *Standard Salesforce.com Page* option then click **Save**.

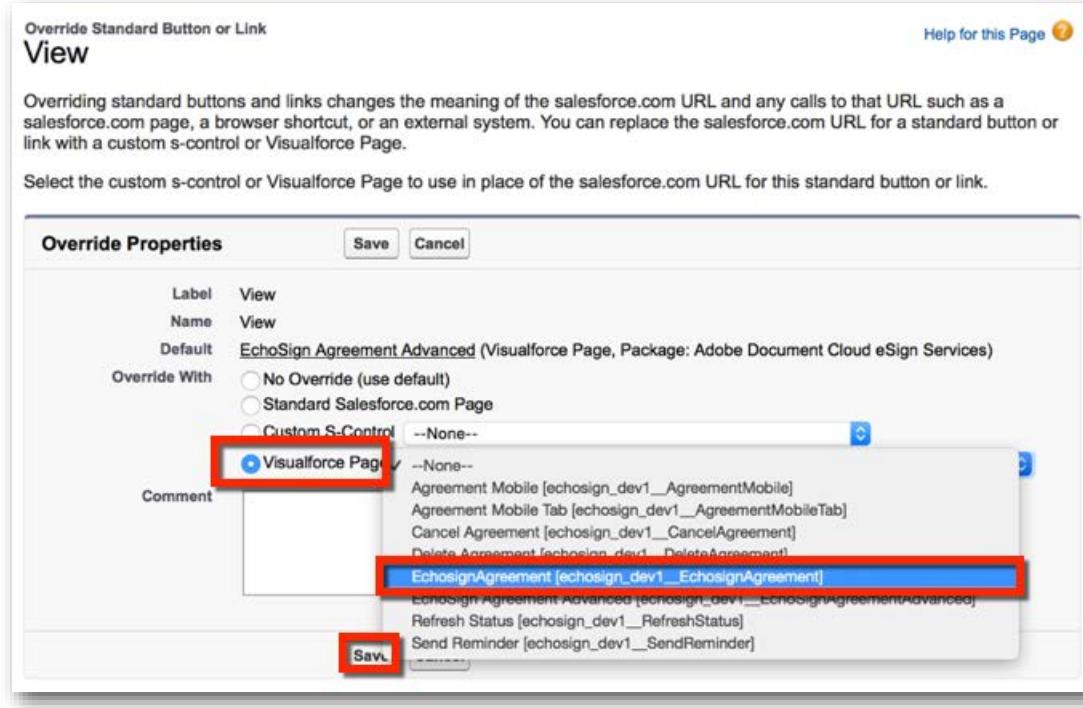
Override Standard Button or Link
Edit

Overriding standard buttons and links changes the meaning of the salesforce.com URL and any calls to that URL such as a salesforce.com page, a browser shortcut, or an external system. You can replace the salesforce.com URL for a standard button or link with a custom s-control or Visualforce Page.

Select the custom s-control or Visualforce Page to use in place of the salesforce.com URL for this standard button or link.

Override Properties		Save	Cancel
Label	Edit		
Name	Edit		
Default	EchoSign Agreement Advanced (Visualforce Page, Package: Adobe Document Cloud eSign Services)		
Override With	<input type="radio"/> No Override (use default) <input checked="" type="radio"/> Standard Salesforce.com Page <input type="radio"/> Custom S-Control --None-- <input type="radio"/> Visualforce Page --None--		
Comment	<div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

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



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

Buttons, Links, and Actions							Buttons, Links, and Actions Help	
Action	Label	Name	Description	Type	Content Source	Icon	Overridden	
Edit	Accept	Accept			Standard Salesforce.com Page		<input type="checkbox"/>	
Edit	Agreements Tab	Tab			Standard Salesforce.com Page		<input type="checkbox"/>	
Edit	Cancel Agreement	Cancel_Agreement_Bulk		List Button	OnClick JavaScript		<input type="checkbox"/>	
Edit	Clone	Clone			Standard Salesforce.com Page		<input type="checkbox"/>	
Edit	Delete	Delete			<u>Delete Agreement (Visualforce Page)</u>		<input type="checkbox"/>	
Edit	Delete	Delete_Agreement		Detail Page Button	<u>Delete Agreement (Custom S-Control)</u>		<input type="checkbox"/>	
Edit	Delete Agreement	Delete_Agreement_Bulk		List Button	OnClick JavaScript		<input type="checkbox"/>	
Edit	Edit	Edit			Standard Salesforce.com Page		<input checked="" type="checkbox"/>	
Edit	List	List			Standard Salesforce.com Page		<input type="checkbox"/>	
Edit	New	New			Standard Salesforce.com Page		<input checked="" type="checkbox"/>	
Edit	Refresh Status	RefreshStatus		Detail Page Link	<u>Refresh Status (Custom S-Control)</u>		<input type="checkbox"/>	
Edit	Send Agreement	Send_Agreement_Bulk		List Button	OnClick JavaScript		<input type="checkbox"/>	
Edit	Send for Signature	SendforSignature		Detail Page Link	<u>Send for Signature (Custom S-Control)</u>		<input type="checkbox"/>	
Edit	SendReminder	SendReminder		Detail Page Link	<u>Send Reminder (Custom S-Control)</u>		<input type="checkbox"/>	
Edit	Send Reminder	Send_Reminder_Bulk		List Button	OnClick JavaScript		<input type="checkbox"/>	
Edit	SetAgreementPassword	SetAgreementPassword		Detail Page Link	URL		<input type="checkbox"/>	
Edit	Update Agreement	Update_Agreement_Bulk		List Button	OnClick JavaScript		<input type="checkbox"/>	
Edit	View	View			EchosignAgreement (Visualforce Page)		<input checked="" type="checkbox"/>	

Customizing the 'Agreement Basic' Page Layout

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

Custom Address Fields

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

Agreement Detail		Edit	Delete
Customer	john doe	Owner	Eran Aloni [Change]
Accounting	accounting@myCompany.com	Opportunity	
Email a Copy to		Contract	
Agreement Name	Sales Contract	Remind Recipient to Sign	Never
Message	Please sign the attached document.	Last Modified By	Eran Aloni, 7/31/2009 12:01 PM
Created By	Eran Aloni, 7/31/2009 12:01 PM		
▼ EchoSign Options			
Signature Type	e-Signature	Password required to sign	<input type="checkbox"/>
I also need to sign this document	<input type="checkbox"/>	Password required to view PDF	<input type="checkbox"/>
Signature Order		Password	
Status	Send for Signature		Result
▼ View Agreement			

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

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

Edit Del	Custom Address	Custom_Address__c
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See [eSign Services for Salesforce Custom Settings](#) for instructions on how to update the 'Override Recipient Field List' settings.

Send using the 'Agreement Basic' page

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

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

Agreement Edit **Save** **Save & New** **Cancel**

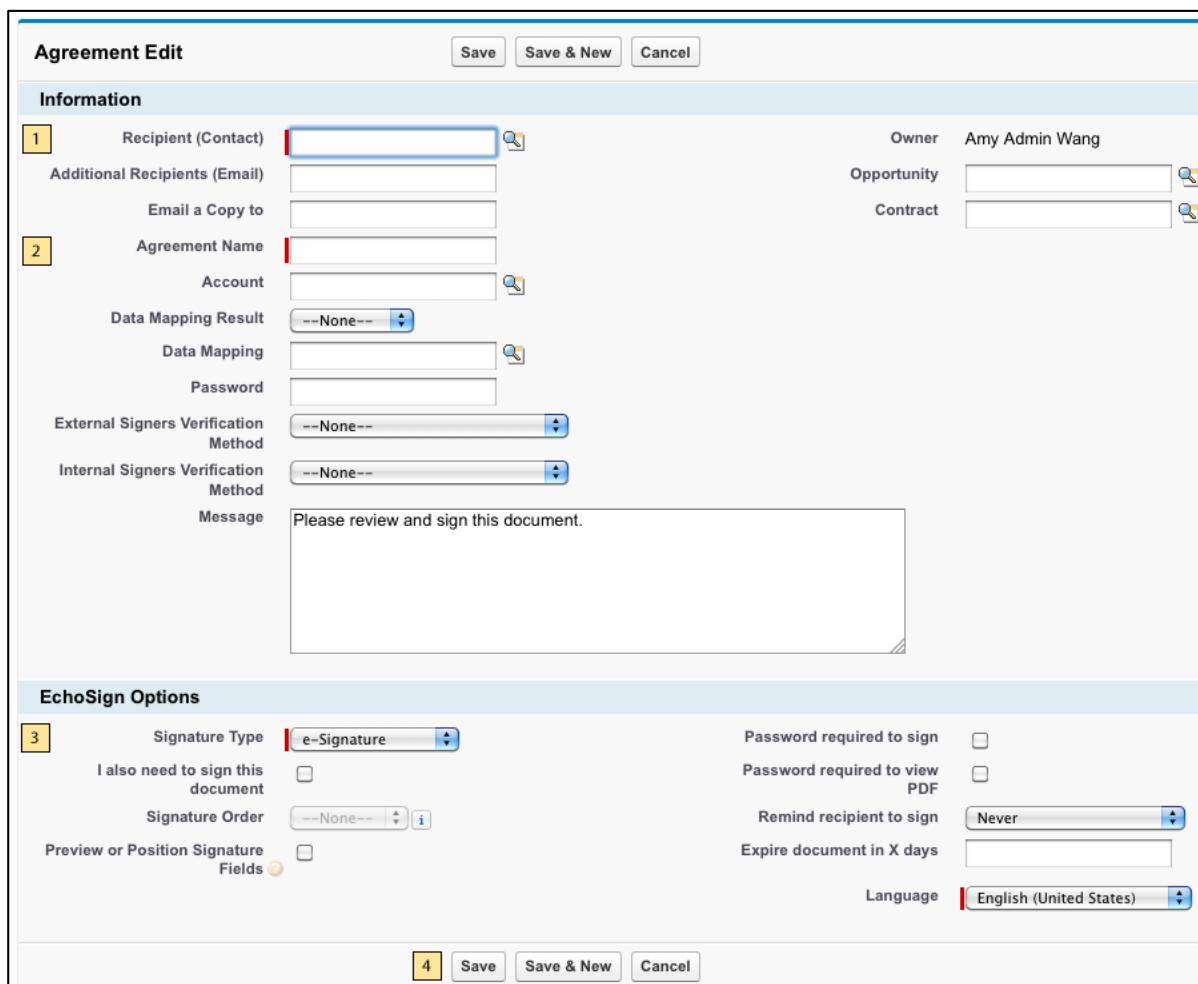
Information

1 Recipient (Contact)	<input type="text"/>	Owner Amy Admin Wang
Additional Recipients (Email)	<input type="text"/>	Opportunity <input type="text"/>
Email a Copy to	<input type="text"/>	Contract <input type="text"/>
2 Agreement Name	<input type="text"/>	
Account	<input type="text"/>	
Data Mapping Result	--None--	
Data Mapping	<input type="text"/>	
Password	<input type="text"/>	
External Signers Verification Method	--None--	
Internal Signers Verification Method	--None--	
Message	Please review and sign this document.	

EchoSign Options

3 Signature Type	e-Signature	Password required to sign	<input type="checkbox"/>
I also need to sign this document	<input type="checkbox"/>	Password required to view PDF	<input type="checkbox"/>
Signature Order	--None--	Remind recipient to sign	Never
Preview or Position Signature Fields	<input type="checkbox"/>	Expire document in X days	<input type="text"/>
		Language	English (United States)

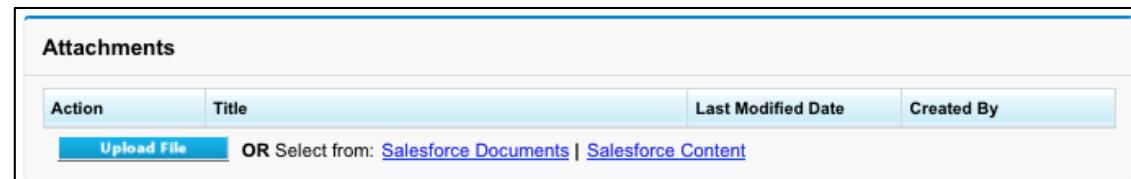
4 Save **Save & New** **Cancel**



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

Attachments

Action	Title	Last Modified Date	Created By
Upload File	OR Select from: Salesforce Documents Salesforce Content		



- Click the **Send for Signature** button



Switching Back to the 'Agreement Advanced' Page Layout

Setting the 'Agreement Advanced' page Style

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

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

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

The screenshot shows the "Custom Objects" page in Salesforce. The "Agreement" object is selected. At the top, there are tabs for "New Custom Object" and "Schema Builder". Below the tabs is a table with columns: Action, Label, Installed Package, Master Object, Deployed, and Description. The "Label" column shows "Agreement" with a red box around it. The "Installed Package" column shows "Adobe Document Cloud eSign Services". The "Master Object" column shows "Agreement Template". The "Deployed" column has a checkmark. The "Description" column is empty. Below the table, there is a note about custom objects and a link to "Help for this Page".

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Add File Attachment	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Form Field Template	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Recipient	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Agreement	Adobe Document Cloud eSign Services		✓	

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

The screenshot shows the "Page Layouts" section for the "Agreement (Managed)" object. At the top, there is a note: "This Custom Object Definition is managed, meaning that you may only edit certain attributes. Display More Information". Below the note is a navigation bar with links: Standard Fields [4], Custom Fields & Relationships [79], Validation Rules [4], Page Layouts [2] (highlighted with a red box), Field Sets [1], Compact Layouts [1], Search Layouts [6], Buttons, Links, and Actions [18], Record Types [0], Apex Sharing Reasons [0], Apex Sharing Recalculation [0], and Object Limits [11].

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

The screenshot shows the "Page Layout Assignment" section. At the top, there is a header with "Page Layouts" and "Page Layout Assignment" buttons. The "Page Layout Assignment" button is highlighted with a red box. Below the header is a table with columns: Action, Page Layout Name, Installed Package, Created By, Modified By, and Feed-Based Layout.

- Click the **Edit Assignment** button.

Page Layout Assignment
Agreement
« Back to Custom Object: Agreement

The table below shows the page layout assignments for different profiles.

	Edit Assignment
Chatter External User	
Chatter Free User	
Chatter Moderator User	
Content Manager	
Standard User	
System Admin Clone	
System Administrator	

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

Help for this Page ?

Agreement

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

Page Layout To Use: -- Select Page Layout -- 25 Selected 0 Changed

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

Help for this Page ?

Agreement

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

Page Layout To Use ✓ -- Select Page Layout -- 25 Selected 0 Changed

Agreement Layout Enterprise / Unlimited
Agreement Layout Professional

Profiles	Page Layout
Chatter External User	Agreement Layout Professional
Chatter Free User	Agreement Layout Professional
Chatter Moderator User	Agreement Layout Professional
Content Manager	Agreement Layout Professional
Standard User	Agreement Layout Professional
System Admin Clone	Agreement Layout Professional
System Administrator	Agreement Layout Professional

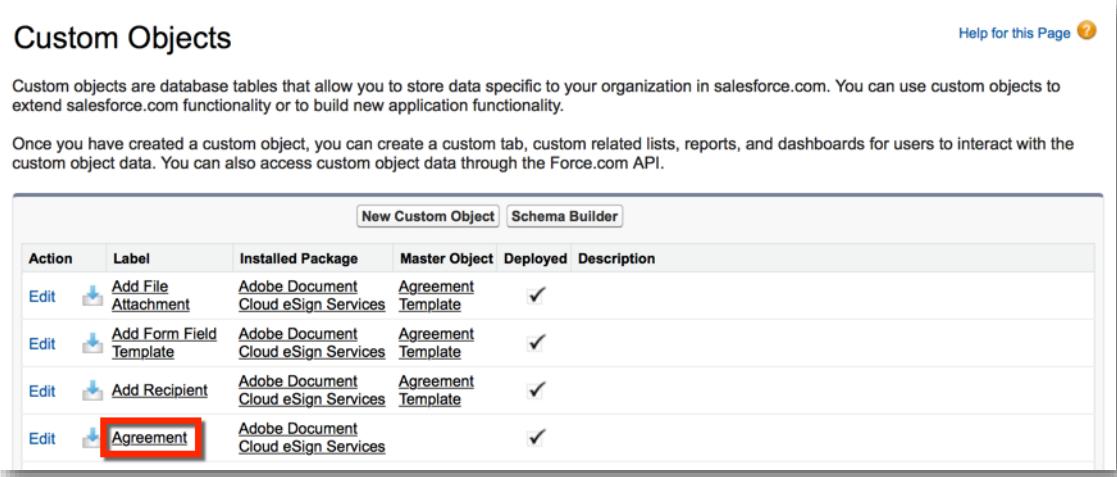
Save Cancel

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

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

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

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



The screenshot shows the 'Custom Objects' page in the Salesforce setup. At the top, there are two buttons: 'New Custom Object' and 'Schema Builder'. Below is a table listing custom objects:

Action	Label	Installed Package	Master Object	Deployed	Description
Edit	Add File Attachment	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Form Field Template	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Add Recipient	Adobe Document Cloud eSign Services	Agreement Template	✓	
Edit	Agreement	Adobe Document Cloud eSign Services		✓	

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



The screenshot shows the 'Agreement (Managed)' page. At the top, it says 'Custom Object' and 'Help for this Page'. Below is a message: 'This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)'. At the bottom, there is a navigation bar with various links, and the 'Buttons, Links, and Actions [18]' link is highlighted with a red box.

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

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

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

Override Standard Button or Link
New Help for this Page ?

Overriding standard buttons and links changes the meaning of the salesforce.com URL and any calls to that URL such as a salesforce.com page, a browser shortcut, or an external system. You can replace the salesforce.com URL for a standard button or link with a custom s-control or Visualforce Page.

Select the custom s-control or Visualforce Page to use in place of the salesforce.com URL for this standard button or link.

Override Properties		Save	Cancel
Label	New		
Name	New		
Default	EchoSign Agreement Advanced (Visualforce Page, Package: Adobe Document Cloud eSign Services)		
Override With	<input checked="" type="radio"/> No Override (use default) <input type="radio"/> Standard Salesforce.com Page <input type="radio"/> Custom S-Control --None-- ▼ <input type="radio"/> Visualforce Page --None-- ▼		
	Save Cancel		

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

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

Standard Buttons and Links				
Action	Label	Name	Overridden	Display
Edit	Agreements Tab	Tab	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	List	List	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	<u>View</u>	View	<input type="checkbox"/>	EchoSign Agreement Advanced (Visualforce Page)
Edit	<u>Edit</u>	Edit	<input type="checkbox"/>	EchoSign Agreement Advanced (Visualforce Page)
Edit	<u>Delete</u>	Delete	<input type="checkbox"/>	Delete Agreement (Visualforce Page)
Edit	Clone	Clone	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	<u>New</u>	New	<input type="checkbox"/>	EchoSign Agreement Advanced (Visualforce Page)
Edit	Accept	Accept	<input type="checkbox"/>	Standard Salesforce.com Page