



The #1 rated eSignature application.



ADOBE ECHOSIGN FOR SALESFORCE

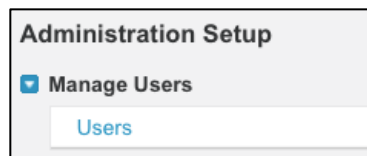
GRANTING ACCESS TO SALESFORCE PROFILES

GRANTING ACCESS TO PROFILES AND USER

During installation of EchoSign for Salesforce, you may have granted access to only Administrators. In that case, you will need to extend access to additional Salesforce.com Profiles after installation. This documentation explains the steps to do this. There are a couple different Salesforce.com page layouts for editing Profiles so please follow the instructions below that correspond to your page layout.

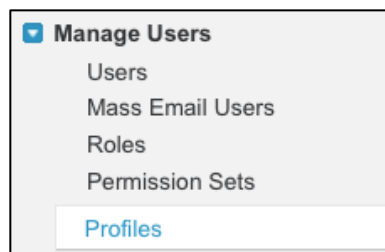
PAGE LAYOUT 1 - INSTRUCTIONS

1. Edit a specific profile by going to:
 - a. Setup > Administration Setup > Manage Users > Profiles



OR

- b. Setup > Administration Setup > Manage Users > Users



- c. Click the Profile link for a specific user.
2. Click on the 'Edit' button for that Profile.
3. In the section under 'Apps' called 'Assigned Apps', click on the 'Edit' button.
4. Make sure the EchoSign application is marked as 'Visible' and click 'Save'.

Assigned Apps		Save	Cancel
App Name	Visible		
Brainshark	<input checked="" type="checkbox"/>		
Call Center	<input checked="" type="checkbox"/>		
Conga Merge	<input checked="" type="checkbox"/>		
Content	<input checked="" type="checkbox"/>		
EchoSign	<input checked="" type="checkbox"/>		

5. Go back to the Profile Overview page and in the section under 'Apps' called 'Objects and Tabs', grant Read, Create, Edit, Delete, View All, and Modify All permissions for all of the following EchoSign objects. Click the 'Edit' button to modify the permissions and 'Save' to save the permissions. Note that enabling all these object permissions would be the highest level of access that could be granted. In some cases, you may decide not to grant access to all objects depending on which features are used.
 - a. Add File Attachments
 - b. Add Recipients
 - c. Agreement Events
 - d. Agreements
 - e. Agreement Templates
 - f. Mutexes
 - g. EchoSign Data Mappings
 - h. EchoSign Field Mappings
 - i. EchoSign File Mappings
 - j. EchoSign Form Field Imports
 - k. EchoSign Form Field Mappings
 - l. EchoSign Form Field Mapping Entries
 - m. EchoSign Group Mappings
 - n. EchoSign Merge Mappings
 - o. EchoSign Object Mappings
 - p. Echosign Recipients
 - q. EchoSign Triggers
 - r. EchoSign User Sync Results
 - s. Map Data into Agreement Fields
 - t. Recipients
 - u. Signed Agreement

Profile Overview > Objects and Tabs Add File Attachments

Add File Attachments [Edit](#)

Add File Attachment: Record Types and Page Layout Assignments

Record Types	Page Layout Assignment
--Master--	Add File Attachment Layout

Object Permissions

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 type="checkbox"/>

6. Go back to the Profile Overview page and in the section under 'Apps' called 'Objects and Tabs', set the tab view settings to: Default On, Default Off or Tab Hidden. Click the 'Edit' button to modify the permissions and click 'Save' to save the permissions. Make the selection for all of the following EchoSign tabs:
 - a. About EchoSign
 - b. Agreements
 - c. Agreement Templates
 - d. EchoSign Admin
 - e. Echosign Data Mappings
 - f. EchoSign Group Mappings
 - g. EchoSign Merge Mappings
 - h. Manage Agreements
 - i. My EchoSign

Profile Overview > Objects and Tabs About EchoSign

About EchoSign [Save](#) [Cancel](#)

Tab Settings

Default On
Tab Hidden
Default Off
Default On

7. Go back to the Profile Overview page and in the section under 'Apps' called 'Apex Class Access' click on the 'Edit' button. Add all EchoSign related Apex

Classes to the 'Enabled Visual Force Pages'. They begin with the text 'echosign_dev1.'

Profile Overview > Apex Class Access ▼

Apex Class Access Edit

Apex Class Name

Profile Overview > Apex Class Access ▼

Apex Class Access Save Cancel

Available Apex Classes		Enabled Apex Classes
AccountCsmAssignEmailHandler	Add ▶ Remove ◀	echosign_dev1.AgreementPushMappingProcessingCon
ChangePasswordController		echosign_dev1.AgreementPushTests
Constants		echosign_dev1.AgreementTemplateProcessor
ForgotPasswordController		echosign_dev1.AgreementTemplateProcessorController
MyProfilePageController		echosign_dev1.AttachmentTemplateController
SiteLoginController		echosign_dev1.DeleteAttachmentTemplateController
SiteRegisterController		echosign_dev1.DeleteRecipientTemplateController
TestEnforceTaskDeletePermissions		echosign_dev1.EchoSignAdminController
sflma.ProcessLead		echosign_dev1.EchoSignAgreementAdvanced
sflma.TestLicenseUpdates		echosign_dev1.EchoSignAgreementPushCallbackContr
sflma.statusPicklistExtension		echosign_dev1.EchoSignApiUtilities
		echosign_dev1.EchoSignCallback
		echosign_dev1.EchoSignDataMapping
		echosign_dev1.EchoSignDataMapping_Controller
		echosign_dev1.EchoSignParserUtilities
		echosign_dev1.EchoSignProcessTrigger

8. Click 'Save'.
9. Go back to the Profile Overview page and in the section under 'Apps' called 'Visualforce Page Access, click on the 'Edit' button. Add all EchoSign related Pages to the 'Enabled Visual Force Pages'. They begin with the text 'echosign_dev1.'

Profile Overview > Visualforce Page Access ▼

Visualforce Page Access Edit

Visualforce Page Name

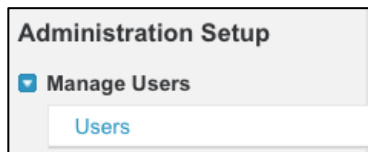
Profile Overview > Visualforce Page Access

Visualforce Page Access [Save] [Cancel]

Available Visualforce Pages		Enabled Visualforce Pages
AnswersHome	Add ▶ Remove ◀	echosign_dev1.AgreementTemplateProcess
BandwidthExceeded		echosign_dev1.ApiKeyInput
ChangePassword		echosign_dev1.AttachDocument
Exception		echosign_dev1.AttachmentTemplate
FileNotFound		echosign_dev1.CancelAgreement
ForgotPassword		echosign_dev1.DeleteAgreement
ForgotPasswordConfirm		echosign_dev1.DeleteAttachmentTemplate
IdeasHome		echosign_dev1.DeleteRecipientTemplate
InMaintenance		echosign_dev1.EchoSignAdminSettings
MyProfilePage		echosign_dev1.EchoSignAgreementAdvanced
SiteLogin		echosign_dev1.EchoSignAgreementPushCallback
SiteRegister		echosign_dev1.EchoSignCallback
SiteRegisterConfirm		echosign_dev1.EchoSignDataMapping
SiteTemplate		echosign_dev1.EchoSignUserGuide
StdExceptionTemplate		echosign_dev1.EchosignAdmin

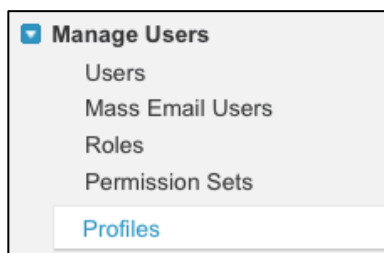
PAGE LAYOUT 2 - INSTRUCTIONS

1. Edit a specific profile by going to:
 - a. Setup > Administration Setup > Manage Users > Profiles



OR

- b. Setup > Administration Setup > Manage Users > Users



- c. Click the Profile link for a specific user.
2. Click on the 'Edit' button for that Profile.
3. In the section called 'Custom App Settings', make sure the EchoSign application is marked as 'Visible'.

Custom App Settings		
	Visible	Default
Call Center	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community	<input checked="" type="checkbox"/>	<input type="checkbox"/>
EchoSign	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4. In the section called 'Custom Object Permissions', grant Read, Create, Edit, Delete, View All, and Modify All permissions for all of the following EchoSign objects. Note that enabling all these object permissions would be the highest level of access that could be granted. In some cases, you may decide not to grant access to all objects depending on which features are used.
 - a. Add File Attachments
 - b. Add Recipients
 - c. Agreement Events
 - d. Agreements
 - e. Agreement Templates
 - f. Mutexes
 - g. EchoSign Data Mappings
 - h. EchoSign Field Mappings
 - i. EchoSign File Mappings
 - j. EchoSign Form Field Imports
 - k. EchoSign Form Field Mappings
 - l. EchoSign Form Field Mapping Entries
 - m. EchoSign Group Mappings
 - n. EchoSign Merge Mappings
 - o. EchoSign Object Mappings
 - p. Echosign Recipients
 - q. EchoSign Triggers
 - r. EchoSign User Sync Results
 - s. Map Data into Agreement Fields
 - t. Recipients
 - u. Signed Agreement

Custom Object Permissions													
	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Add File Attachments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EchoSign File Mappings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Recipients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EchoSign Form Field Imports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EchoSign Form Field Mappings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agreement Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EchoSign Form Field Mapping Entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agreement Templates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EchoSign Group Mappings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conga Email Staging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EchoSign Merge Mappings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conga Email Templates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EchoSign Object Mappings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conga Templates (v5)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Echosign Recipients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Custom Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EchoSign Triggers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mutexes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EchoSign User Sync Results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EchoSign Data Mappings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Map Data into Agreement Fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EchoSign Field Mappings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Signed Agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. In the section called 'Tab Settings' > Custom Tab Settings, set the tab view settings: Default On, Default Off or Tab Hidden. Make the selection for all of the following tabs:

- About EchoSign
- Agreements
- Agreement Templates
- EchoSign Admin
- Echosign Data Mappings
- EchoSign Group Mappings
- EchoSign Merge Mappings
- Manage Agreements
- My EchoSign

Custom Tab Settings			
About Conga Composer	<input type="button" value="Default On"/>	Custom Contacts	<input type="button" value="Default On"/>
About EchoSign	<input type="button" value="Default On"/>	EchoSign Admin	<input type="button" value="Default On"/>
Agreements	<input type="button" value="Default On"/>	EchoSign Data Mappings	<input type="button" value="Default On"/>
Agreement Templates	<input type="button" value="Default On"/>	EchoSign Group Mappings	<input type="button" value="Default On"/>
Conga Email Templates	<input type="button" value="Default On"/>	EchoSign Merge Mappings	<input type="button" value="Default On"/>
Conga Mail Merge	<input type="button" value="Default On"/>	Manage Agreements	<input type="button" value="Default On"/>
Conga Setup	<input type="button" value="Default On"/>	My EchoSign	<input type="button" value="Default On"/>

6. Click 'Save' to save the Profile settings

7. Go to the Profile page again and in the section called 'Enabled Apex Class

Access', click on the 'Edit' button. Add all EchoSign related Apex Classes to the 'Enabled Apex Classes'.

Enabled Apex Class Access
Edit

Enable Apex Class Access

Save
Cancel

Available Apex Classes		Enabled Apex Classes
ChangePasswordController ForgotPasswordController MyProfilePageController SiteLoginController SiteRegisterController	Add ▶ Remove ◀	EchoSign_QuoteGlobal EchoSign_selectQuotePdf TestAddAgreementEventToChatterFeed echosign_dev1.EchoSignScheduleCallback

- Click 'Save'.
- In the section called 'Enabled Visualforce Page Access', click on the 'Edit' button. Add all EchoSign related Pages to the 'Enabled Visual Force Pages'. They begin with the text 'echosign_dev1.'

Enabled Visualforce Page Access
Edit

Enable Visualforce Page Access

Save
Cancel

Available Visualforce Pages		Enabled Visualforce Pages
AnswersHome BandwidthExceeded ChangePassword Exception FileNotFound ForgotPassword ForgotPasswordConfirm IdeasHome InMaintenance MyProfilePage SiteLogin SiteRegister SiteRegisterConfirm SiteTemplate	Add ▶ Remove ◀	EchoSign_selectQuotePdf echosign_dev1.AgreementTemplateProcess echosign_dev1.ApiKeyInput echosign_dev1.AttachDocument echosign_dev1.AttachmentTemplate echosign_dev1.CancelAgreement echosign_dev1.DeleteAgreement echosign_dev1.DeleteAttachmentTemplate echosign_dev1.DeleteRecipientTemplate echosign_dev1.EchoSignAdminSettings echosign_dev1.EchoSignAgreementAdvanced echosign_dev1.EchoSignAgreementPushCallback echosign_dev1.EchoSignCallback echosign_dev1.EchoSignDataMapping