Adobe Document Cloud eSign Services

for Salesforce Version 17 Upgrade Guide

Table of Contents

The [Adobe Document Cloud eSign services (formerly EchoSign) for Salesforce](#) integration package is available from the Salesforce AppExchange. This guide is designed to help current customers of Adobe EchoSign upgrade from an older release version to eSign services for Salesforce version 17.
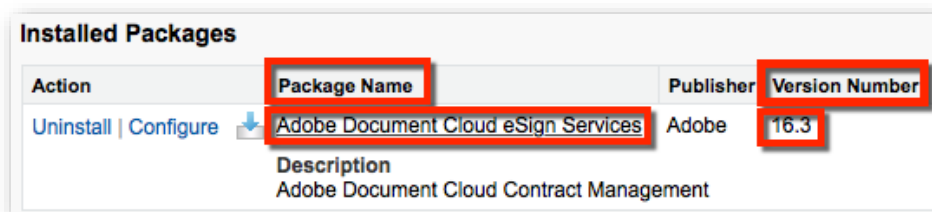
Please refer to the [release notes](#) for additional information on the new features in Adobe Document Cloud eSign services version 17. Also refer to the [installation and customization guide](#) for more information.

Upgrading from a previous release

Each version of Adobe Document Cloud eSign services (formerly EchoSign) for Salesforce has new features and enhancements that can provide key improvements to your document workflows. *Adobe strongly recommends that you upgrade to the latest release, as Adobe will be discontinuing support of older releases over time.*

eSign services for Salesforce version 17 can be upgraded from any package named "EchoSign" or "Adobe Document Cloud eSign Services". If you have earlier versions of EchoSign for Salesforce installed or need assistance for upgrades, please contact the eSign services client success manager assigned to your account. That person will be able to help you or direct you to Adobe support and/or Adobe Professional Services for assistance.

To find the version of the eSign services for Salesforce integration you currently have installed, select **Setup** then navigate to **Build > Installed Packages**.

Note the Package Name and the Version Number. The Package Name you have installed is either "Adobe Document Cloud eSign Services" or "Adobe Document Cloud eSign Services - Unmanaged."

Older versions of the EchoSign for Salesforce packages are unmanaged packages. Newer versions are managed packages. This document includes instructions on how to update from a managed or an unmanaged package. Please follow the instructions based on the package type installed currently.

Warning: If you are upgrading from version 12 or prior and are sending large document transactions (greater than 4.0 MB from the send agreement page and 9.0 MB when sending in batch), you must configure Salesforce to send large documents for signature. (See the [installation and customization guide](#) for more information on large documents). Also, if you're upgrading from version 12 or prior and have multiple EchoSign accounts sending from the same Salesforce org, you must consolidate these users under one EchoSign account before upgrading. After consolidating your users, you can use group mappings to map specific Salesforce profiles to Adobe Document Cloud eSign services groups. (See the [installation and customization guide](#) for more information). Contact Adobe Support (echosign@support.com) if you have questions.

For more information on managed versus unmanaged packages, visit *http://www.salesforce.com/us/developer/docs/packagingGuide/Content/packaging_about_packages.htm.*

Important upgrade notes for all customers

1. If you have users in your Salesforce org who belong to multiple eSign services accounts, please reach out to your Adobe client success manager or to Adobe support before upgrading.

2. Before upgrading your production account, Adobe recommends testing the upgrade process in your Salesforce sandbox environment. Also, make sure your email address in the Sandbox environment is one that you have access to in case you ever need to change the email for your eSign services account.

Upgrading from EchoSign unmanaged packages

If you have a package with the package name "EchoSign Unmanaged" currently installed, there are two possible approaches to upgrade to the latest version of the Adobe Document Cloud eSign services managed package. You can decide which approach works better for your organization.

Option 1: Install the new version and hide the old

This option is much easier to set up than option 2, but the downside is that existing agreements in your org won't be as easily accessible by your users in the future.

1. Install the latest version of the Adobe Document Cloud eSign services managed package from the AppExchange into your org, configuring and exposing it to all relevant profiles and page layouts. Refer to the installation and customization guide for more information about setting up the new package. Once the latest eSign services package is installed, your Salesforce users can immediately start using it.

2. After installing the new package, hide the old unmanaged package from users by removing it from their profiles and page layouts. This action is strongly suggested so users are not confused by seeing two similarly named tabs, related lists, objects, and so on, side-by-side when using Salesforce.

This approach allows your Salesforce users to start using the new version of the eSign services for Salesforce package while retaining the legacy agreement data from the older package in case it needs to be accessed. However, note that since the old package is hidden, accessing it must be a rare and special request. If those older agreements need to be referenced frequently, then hiding the old package may not be the right course of action for your organization.

Option 2: Export/import data from the old package into a new package

Option 2 allows you to migrate your existing agreement data to the new package, but the downside is that it requires more effort than option 1. This approach involves the following steps:

1. Export the agreement data from the existing unmanaged package using a data loader tool like *Jitterbit* or *Dataloader.io* or the standard *Salesforce Data Loader*.

2. Uninstall your current unmanaged package, install the latest managed package version from the *AppExchange*, and reimport the agreement data from the old unmanaged package into the new package.

A word of caution about this approach is that uninstalling a package removes all eSign services data in that package (that is, agreements) from that org. Therefore, it requires that you export first and then import data back into Salesforce to retain the data when moving to the new managed package.

Note: The agreements still exist in echosign.adobe.com, but they are not accessible from Salesforce once you remove them.

In addition, exporting and importing agreement data may include child objects, depending on requirements, and must be structured appropriately. One complication that arises when importing child objects is that the parent agreement ID has changed, so it needs to be updated appropriately for each imported row. There are two key child objects:

- **Agreement Event**—Records the audit events for an agreement. If this is not required, it can be skipped.
- **Attachment**—Contains the original sent document and the final signed PDF for the agreement. Some orgs may have a signed PDF link to echosign.adobe.com, which for many would be sufficient, so the attachment can be skipped.

Another consideration is mapping the fields from the exported unmanaged records to the latest managed record. All the fields in the old package still exist in the new package, so they can be mapped directly. An advanced tool like Dataloader.io will automatically match to the correct field based on the column name.

For questions regarding upgrading from the EchoSign unmanaged packages, please contact your Adobe client success manager.

Upgrading from managed packages

If you have a package with the package name of "Adobe Document Cloud eSign Services" (formerly EchoSign) currently installed, you must do the following to upgrade to the latest version of the Adobe Document Cloud eSign services package:

- Install the eSign services for Salesforce upgrade package
- Configure the application

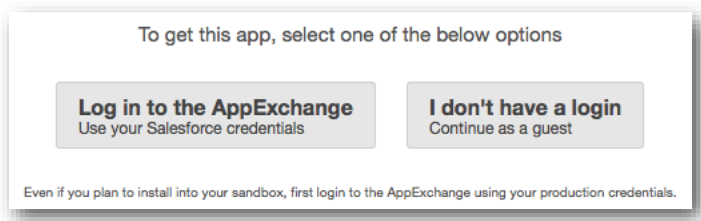Before beginning the upgrade, please refer also to the upgrade notes for managed packages.
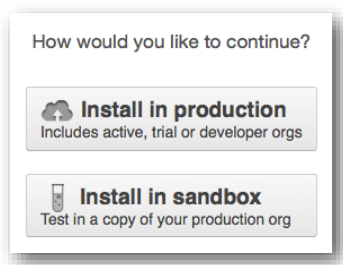
Installing the eSign Services for Salesforce v17 upgrade

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 **Log in to the AppExchange** and enter your credentials to continue.

4. Determine where you would like to install the upgrade (production or sandbox).

How would you like to continue?

☁ **Install in production**
Includes active, trial or developer orgs

🧪 **Install in sandbox**
Test in a copy of your production org

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.

ⓘ Before installing, please review the **customization guide** to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING

PACKAGE
eSign services from Adobe: formerly EchoSign (e-Sign, eSignature)

VERSION
Adobe Document Cloud eSign Services (17.x)

SUBSCRIPTION
Free

DURATION
Does Not Expire

NUMBER OF SUBSCRIBERS
Site-wide

WHERE YOU ARE INSTALLING

ORGANIZATION
ABC Corporation

EDITION
Developer

USER NAME
rlawerson@gmail.com

☑ **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 your Username and Password then click **Login in to Salesforce**.
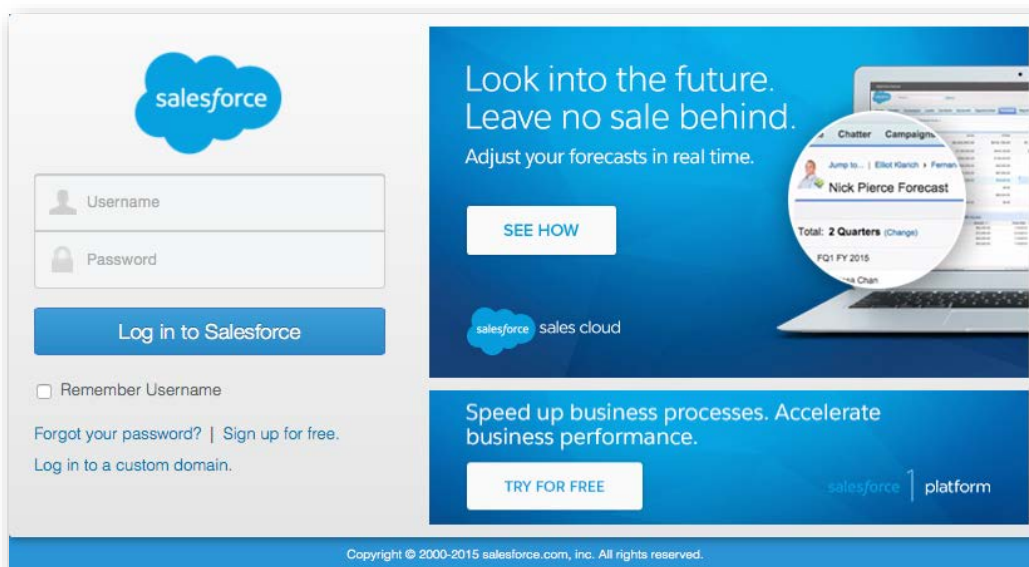
Note: You can optionally register for mobile phone during log in. Or you can respond 'No thanks'.

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

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.
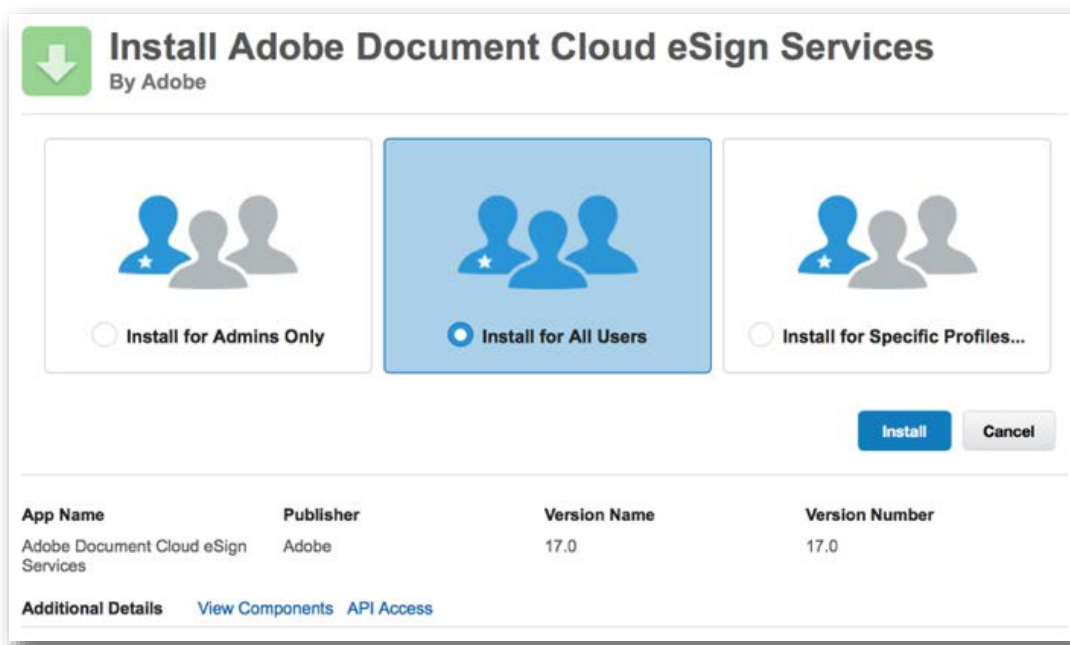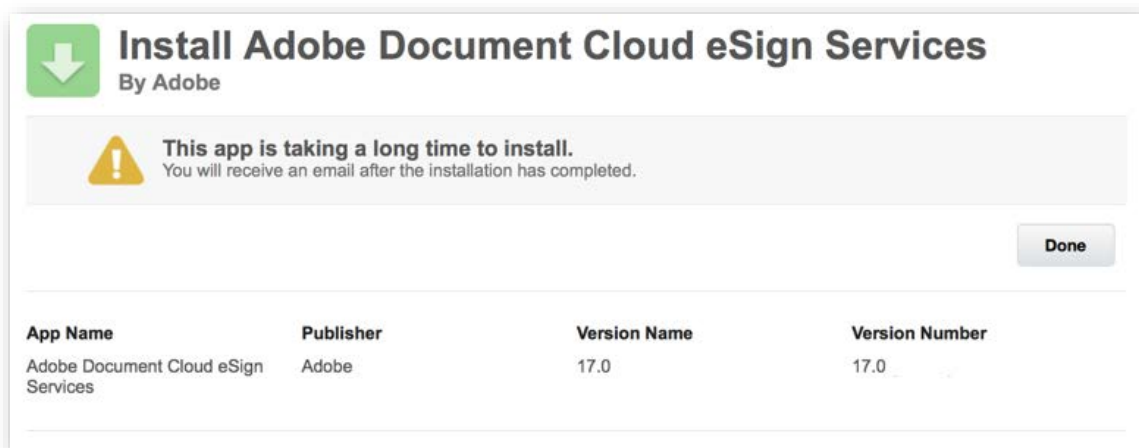

Installation can take a few minutes.

8. If the *Approve Third Party Access* popup displays, enable 'Yes, grant access to third-party web sites' so that Salesforce can securely access eSign services. Click **Continue** to start the installation.
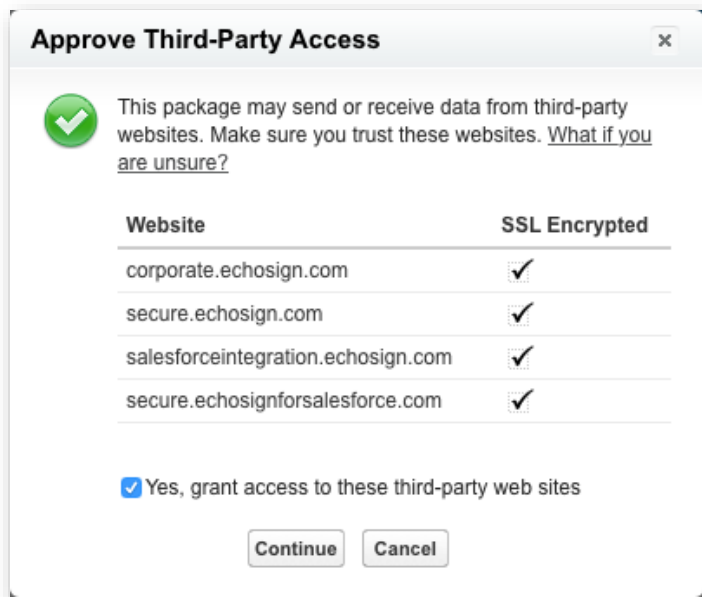
9. Installation can take several minutes. During installation, a notification page displays. Once you receive the email notifying you that the package has been installed successfully, click **Done** to continue.

The Installed Package page now displays your current package version.

Configuring eSign Services after Upgrading

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

Note: Before proceeding with the configuration, please ensure that the *Lock sessions to the IP address from which they originated* setting is underlined disabled. To do this, click **Setup** then navigate to **Administer | Security Settings | Session Settings**.

1. Depending on the version you are upgrading from, select **EchoSign** or **Adobe Document Cloud** from the Force.com App Menu at the far right, then click the **eSign Services Admin** tab to launch the Setup Wizard.
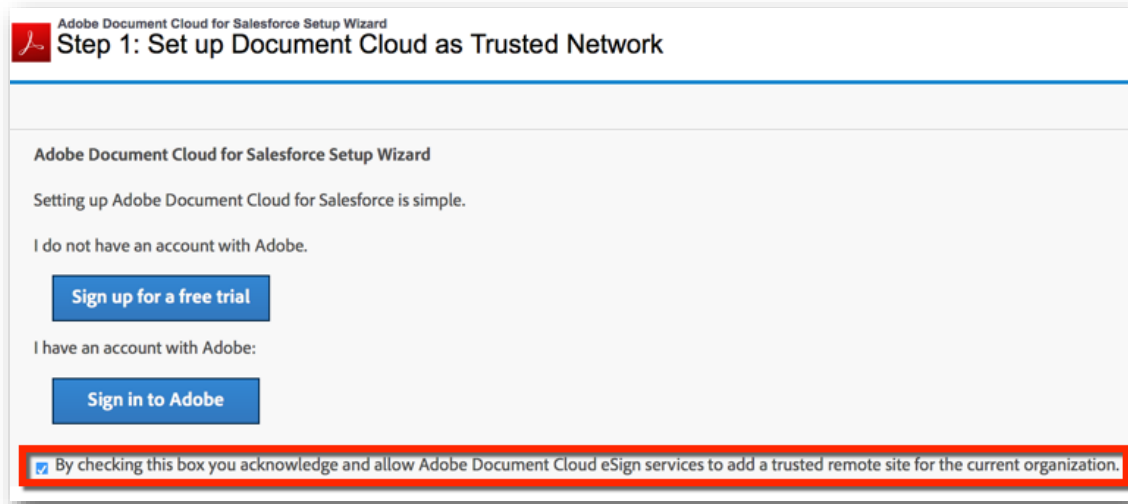
   Note: If the Setup Wizard doesn't launch automatically, click the **Account Setup** tab in eSign Services Admin, then click the **Launch Setup Wizard** link as shown below.
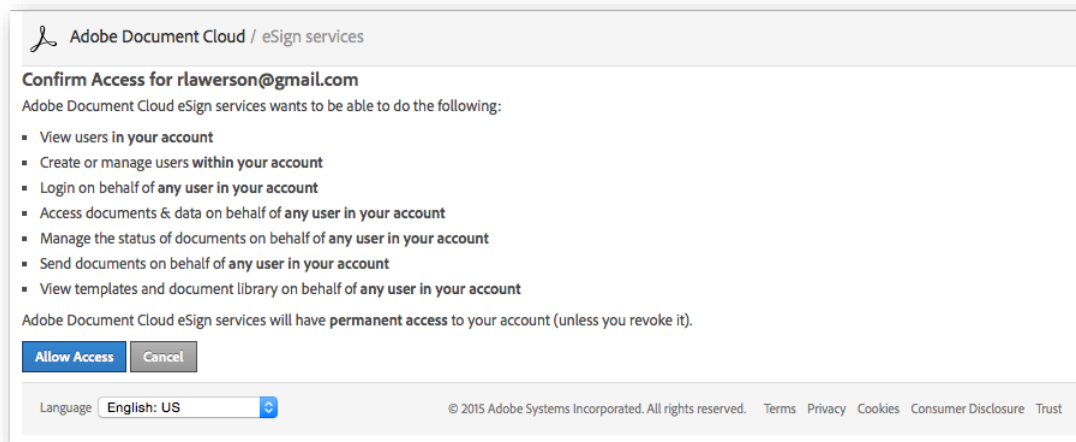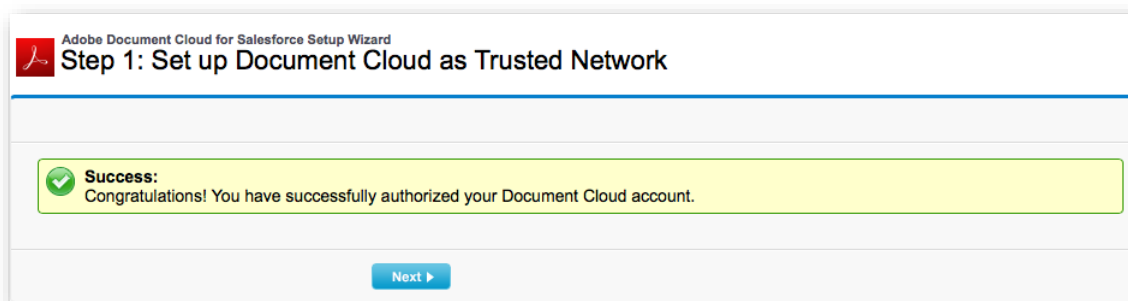
2. In "Step 1: Set up Document Cloud as Trusted Network" of the Setup Wizard, enable the checkbox at the bottom to acknowledge and allow Adobe Document Cloud eSign services to add a trusted remote site for the current organization, then click **Sign in to Adobe** to sign in with your Adobe account.

3. After signing in to your Adobe Account, the Confirm Access page (for OAuth) displays. Click the **Allow Access** button. (See Enhanced security with OAuth 2.0 for more information.)

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 if required. Click **Save.**

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

The Setup Wizard displays "Congratulations – your setup is complete."
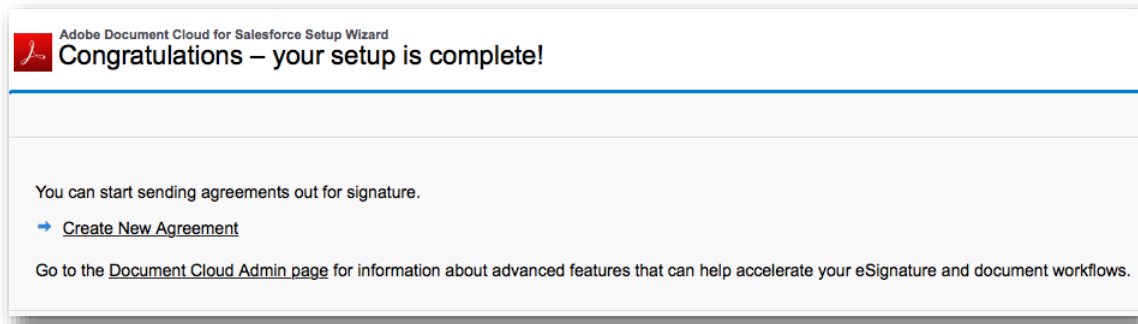
7. If you would like the application name in the Force.com App Menu to read *Adobe Document Cloud* instead of *EchoSign*, you can do the following:

    a) Select **Setup** then navigate to **Build | Create | Apps**.
    b) Click **Edit** next to EchoSign.
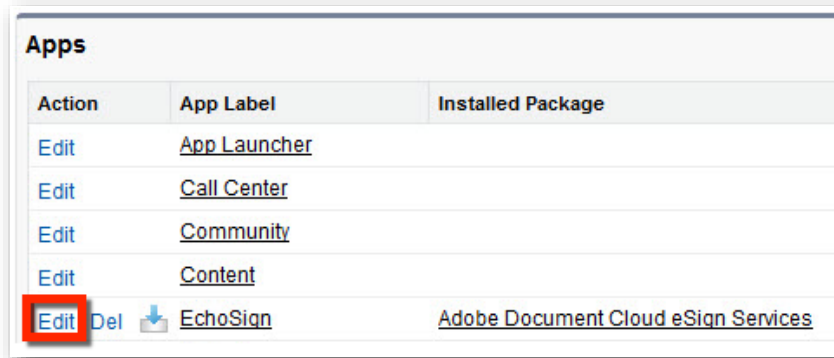
    c) Change the 'App Label' field to **Adobe Document Cloud** as shown below.
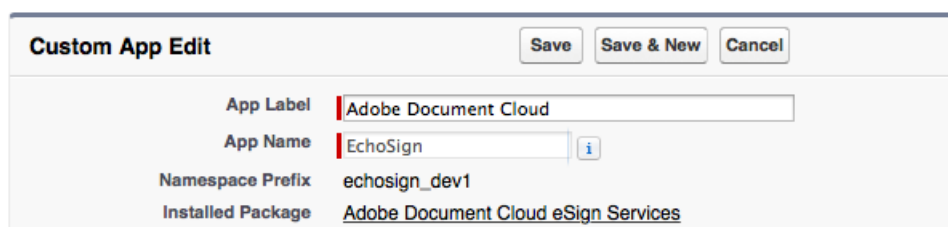
    d) Leave the 'App Name' as EchoSign.
    e) Click **Save**.

    The drop-down menu at the right should now display *Adobe Document Cloud* instead of "*EchoSign*".
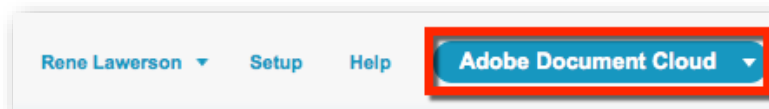
Once the installation and configuration of the v16 package is complete, you should refer to the appropriate sections in this guide for information on which settings and fields were added in versions 13, 14, 15, 16, and 17. You must manually enable these new settings and field values in your org in order for the v17 package to work correctly. For example if you are upgrading from v14 to v17, you should enable the any new settings, fields, or both listed for versions v15 and v16.

Important upgrade notes for managed packages

1. *Do not* uninstall your existing EchoSign or Adobe Document Cloud eSign services for Salesforce package. Uninstalling the package will result in the loss of all your EchoSign (now Adobe Document Cloud eSign services) data in Salesforce.

2. Keep in mind that hosted agreements that were sent from EchoSign (now eSign services) for Salesforce version 14 or earlier and are still out for signature during the time of upgrade will not be able to get status updates when they are signed after the upgrade. Please make sure that agreements initiated as hosted agreements are signed before you upgrade.

3. Hosted agreements no longer need Sites in Salesforce, starting in version 13. Sites are required only if you need to send large document transactions—greater than 4.0 MB from the send agreement page and 9.0 MB when sending in batch. (See the installation and customization guide for more information on large documents.) Keep in mind that Professional Edition will not support sending large files because Sites are not supported. If you previously set up Sites for hosted agreements and do not need to send large transactions, you can deactivate the EchoSign Callback Site.

4. A number of new eSign services settings were added in versions 13, 14, 15, and 17. Make sure you review them and determine which you want to set for your org. The following sections outline the most commonly used new settings and field values added in versions 13 to 17. For a full listing of all the eSign services custom settings, refer to the installation and customization guide.

What's new in version 17

New settings in version 17

Review the new settings added in version 17 to determine if you want to enable any of these capabilities. To go to the settings, choose Develop > Custom Settings > (Manage) Document Cloud Settings.

*   **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 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 Post Sign Options**—Enable this option to take your singers to a landing page of your choice. This makes the 'Post Sign Redirect URL' and 'Post Sign Redirect Delay' options available on the send agreement page. Signers of an agreement are redirected to the specified URL after they sign. For example, you could redirect them to your company web site or a survey page. This option can be made read only for senders using the *Read Only Post Sign Options* setting.

- **Enable 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.
- **Hide Sidebar for Agreement Editor Page**—Enable this setting to hide the sidebar in the Agreement Editor page. The Agreement Editor page can be accessed by clicking an the name of an agreement displayed in the sidebar, in the Agreements Home page, or in the list of agreements for a related object.
- **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 Sender Signs Only**—Enable this setting to display the 'Sender Signs Only' option as read-only in the Recipients section of the send agreement page. This setting works in conjunction with the *Enable Sender Signs Only* setting.

New Field Values in version 17

There are no field values in version 17.

Deprecated custom settings and fields in version 17

There are no deprecated custom settings in version 17.

Agreement Template field values added in version 17

If you are using Agreement Templates and are upgrading from version 12, 13, 14, 15, or 16, edit the Agreement Template layout and drag the new fields introduced in version 17 to the layout.

1. Choose Setup > Create > Objects > Agreement Templates > Page Layout > (Edit) Agreement Template Layout.

2. Add the new version 17 fields to the Information section:

   - Post Sign Redirect Delay (seconds)
   - Post Sign Redirect URL
   - Sender Signs Only

Other field values added in version 17

Salesforce by default does not enable field values that were added to EchoSign (now eSign services) for Salesforce version 17 when you upgrade from an older version to the latest version. Therefore, you need to add the following field values that were added in version 17:

Object: Add File Attachment (Attachment_Template__c)
Field: Attachment Type (Type__c)
Value to add: Quote Document from Master Quote

- Quote Document from Opportunity Quote
- Runtime Variable

What's new in version 16

Enhanced security with OAuth 2.0

To improve data security, eSign services now uses OAuth 2.0 to authenticate your eSign services account within Salesforce. This new protocol lets Salesforce talk to eSign services without requesting your eSign services password. Since sensitive information is not being shared directly between the apps, your account is less likely to be compromised. This improvement will not impact your implementation, but you will need to do a one-time setup to authorize your installed Salesforce package to communicate with the Adobe Document Cloud.

New settings in version 16

There are no new settings in version 16.

Agreement Template field values added in version 16

There are no new template field values in version 16.

What's new in version 15

New settings in version 15

Review the new settings added in version 15 to determine if you want to enable any of these capabilities. To go to the settings, choose Develop > Custom Settings > (Manage) EchoSign Settings.

- **Show EchoSign Library Attachments**—Show the option to add EchoSign document templates.
- **Show EchoSign Field Templates**—Show the option to select and apply EchoSign form field layer templates on documents.
- **Hide Ability to Add EchoSign Field Templates**—Hide the link that allows senders to "Add Form Field Template" on draft documents.
- **Hide Reorder Attachments**—Hide the sort attachments option for draft agreements.
- **Hide Reorder Recipients**—Hide the sort recipients option for draft agreements.
- **Show Recipient Signing Order Options**—Show two options for recipient signing: serial (ordered entered) and parallel (in any order).
- **Read Only Recipient Signing Order Options**—Make the options for recipient signing order read-only on an agreement.
- **Enable Per Signer Identity Verification**—Allow each signer to have a different identity verification method (for example, password, phone, social identity, KBA).
- **Enable Phone Authentication**—Show the phone authentication option for verifying recipient identity. Usage of this feature is limited and may incur added costs.

Agreement Template field values added in version 15

If you are using Agreement Templates and are upgrading from version 12, 13, or 14, edit the Agreement Template layout and drag the new field introduced in version 15 to the layout.

1. Choose Setup > Create > Objects > Agreement Templates > Page Layout > (Edit) Agreement Template Layout.

2. Add the following version 15 field to the Agreement Options section:
   - Signature Flow

Manage and send agreements in batch in version 15

Version 15 introduces new functionality for sending agreements, deleting agreements, sending reminders, and managing agreements in batch. To enable these Batch Agreement buttons after upgrading:

1. Choose Setup > Create > Objects > Agreement > Search Layouts.
2. Edit the Search Results and Agreements List View layouts.
3. Add the five buttons.
4. Click **Save**.

New field values in version 15

Salesforce by default does not enable field values that were added to EchoSign (now Adobe Document Cloud eSign services) for Salesforce version 15 when you upgrade from an older version to the latest version. Therefore, you need to enable the following field values that were added in version 15:

Object: Add File Attachment (Attachment_Template__c)
Field: Attachment Type (Type__c)
Values to add:
- Document from EchoSign Library

Object: Agreement (SIGN_Agreement__c)
Field: Agreement Status (Status__c)
Values to add:
- Created

Object: Agreement Template (Agreement_Template__c)
Field: Language (Language__c)
Values to add:
- Vietnamese (Vietnam)

Object: EchoSign Field Mapping (SIGN_Field_Mapping__c)
Field: Map on Events (Map_on_Events__c)
Values to add:
- Expired

Object: EchoSign File Mapping (SIGN_File_Mapping__c)
Field: Map on Events (Map_on_Events__c)
Values to add:
- Expired

Delete custom settings and fields deprecated in version 15

In version 15, some EchoSign (now Adobe Document Cloud eSign services) custom settings and fields were deprecated and are no longer relevant.

Note: Before deleting fields, make sure that the values of these fields are not being used anywhere in your organization, for example, reports. This action is permanent and cannot be undone.

Deleting deprecated custom settings

After the upgrade, you should delete the deprecated custom settings by choosing Setup > Develop > Custom Settings > EchoSign Settings. Under the Actions column, click Del for the following fields:

- echosign_dev1__API_Key__c
- echosign_dev1__Enable_Suggest_Revisions_Field__c
- echosign_dev1__Reset_API_Security_Key__c
- echosign_dev1__Security_Shared_Token__c
- echosign_dev1__API_Server_URL__c
- echosign_dev1__Server_URL__c

Deleting deprecated fields

After the upgrade, you should delete the deprecated fields by choosing Setup > Create > Object. Select the object from the following list, navigate to the Custom Fields section, and click Del from the Actions column.

- Agreement Template
  - echosign_dev1__Suggest_Revisions__c

- Agreement
  - echosign_dev1__Enable_Revisions__c
  - echosign_dev1__Recipient_Signing_Order__c
  - echosign_dev1__Merge__c

Settings and fields added in version 14

New settings in version 14

Review the settings added in version 14 to determine if you want to enable any of these capabilities. To go to the settings, choose Develop > Custom Settings > (Manage) EchoSign Settings.

- **Read Only Account**—Make the Account field a read-only agreement field. This is useful if you want to prepopulate the field but not allow the sender to edit it.
- **Read Only Agreement Name**—Make the Agreement Name field a read-only agreement field.
- **Read Only Email Copies**—Make the "Send email copies to" field a read-only agreement field.
- **Read Only Field Set**—Make the Additional Fields section read-only on an agreement.
- **Read Only Hosted Signing**—Make the Hosted Signing checkbox a read-only agreement field.
- **Read Only Language**—Make the Language field a read-only agreement field.
- **Read Only Message**—Make the Message field a read-only agreement field.

- **Read Only Opportunity**—Make the Opportunity lookup field a read-only agreement field.
- **Read Only Preview or Position**—Make the "Preview document or position signature fields" checkbox a read-only agreement field.
- **Read Only Recipient**—Make the Recipients section read-only on an agreement.
- **Read Only Security Options**—Make the Security Options section read-only on an agreement.
- **Read Only Sender Signs**—Make the "I also need to sign this document" checkbox a read-only agreement field.
- **Read Only Sign Expiration**—Make the "Allow signers X days to sign this document." a read-only agreement field.
- **Read Only Sign Reminder**—Make the "Remind recipient to sign" checkbox a read-only agreement field.
- **Read Only Signature Type**—Make the Signature Type field a read-only agreement field.

Agreement Template field values added in version 14

If you are using Agreement Templates and are upgrading from version 12 or 13, edit the Agreement Template layout and drag the field introduced in version 14 to the layout.

1. Choose Setup > Create > Objects > Agreement Templates > Page Layout > (Edit) Agreement Template Layout.

2. Add the following version 14 field to the Information section:
   - Available for Publisher Actions

Note: If you are using version 12, please remove the Password to Sign Agreement field used in version 12, as the previous fields replace it. Also, the option to Allow Signers to Suggest Revisions is no longer available in EchoSign (now eSign services), so you can remove it if it appears in your Agreement Template UI.

Other field values added in version 14

Salesforce by default does not enable field values that were added to EchoSign (now eSign services) for Salesforce version 14 when you upgrade from an older version to the latest version. Therefore, you need to add the following field values that were added in version 14:

Object: Add File Attachment (Attachment_Template__c)
Field: Attachment Type (Type__c)
Values to add:
- Quote Document from Opportunity Quote
- Runtime Variable

Object: Add Recipient (Recipient_Template__c)
Field: Source of Recipient (Type__c)
Values to add:
- All Opportunity Contact Roles
- Account Primary Contact Role
- Account Contact Role
- All Account Contact Roles

- Runtime Variable

Object: Agreement (SIGN_Agreement c)
Field: Language (AgreementLocale__c)
Values to add:
- Czech (Czech Republic)

- Turkish (Turkey)

Object: Agreement Template (Agreement_Template__c)
Field: Language (Language__c)
Values to add:
- Czech (Czech Republic)

- Turkish (Turkey)

Settings and fields added in version 13

New settings in version 13

Review the settings added in version 13 to determine if you want to enable any of these capabilities. To go to the settings, choose Develop > Custom Settings > (Manage) EchoSign Settings.

- **Auto-Sync Group Mappings**—Automatically move the correct EchoSign groups when their Salesforce user profiles are updated.

- **Disable Send Email Copies**—Hide the "Send email copies to:" field on the send agreement page.

- **Disable Knowledge Based Authentication**—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.com have KBA enabled so you can use it in Salesforce.

- **Disable Web Identity Verification**—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 Mapping Error Notification**—Send email notifications to the data mapping or merge mapping owner any time there are errors when the mappings are executed.

- **Enable Recipient Approver Role**—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 Separate Signer Identity Methods**—Enable the option to select different identity verification methods for recipients in your EchoSign (now eSign services) account and those outside your eSign services account. This applies to KBA, web 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 select this option, then all signers or approvers will verify using the same method, as selected by the sender.

Agreement Template field values added in version 13

If you are using Agreement Templates and are upgrading from version 12, edit the Agreement Template layout and drag the fields introduced in version 13 to the layout.

1. Choose Setup > Create > Objects > Agreement Templates > Page Layout > (Edit) Agreement Template Layout.

2. Add the following version 13 fields to the Agreement Security Options section:

    - External Signers Verification Method
    - Internal Signers Verification Method

Other field values added in version 13

Salesforce by default does not enable field values that were added to EchoSign (now eSign services) for Salesforce version 13 when you upgrade from an older version to the latest version. Therefore, you need to add the following field values that were added in version 13:

Object: Add File Attachment
Field: Attachment Type
Value to add: Quote Document from Master Quote

Object: Agreement Template
Field: Language
Values to add:
-   Chinese (Taiwan)

-   English (United Kingdom)

-   Korean (South Korea)

-   Polish (Poland)

Object: Agreement (SIGN_Agreement c)
Field: Language (AgreementLocale__c)
Values to add:
-   Chinese (Taiwan)

-   English (United Kingdom)

-   Korean (South Korea)

-   Polish (Poland)

Object: EchoSign File Mapping
Field: Source Type
Values to add:
-   Signed Agreement - Merged PDF

-   Signed Agreement - Separate PDFs

-   Supporting Documents

Object: Agreement
Field: Agreement Status
Values to add:

- Send in Progress

- Approved

- Waiting for Counter-Approval

Object: EchoSign Form
Field Import Field: Type
Value to add: Text Entry

For more information

Solution details: https://www.echosign.adobe.com/en/products/echosign-salesforce.html

Adobe Systems Incorporated
345 Park Avenue
San Jose, CA 95110-2704 USA
www.adobe.com