
Adobe Document Cloud eSign Services

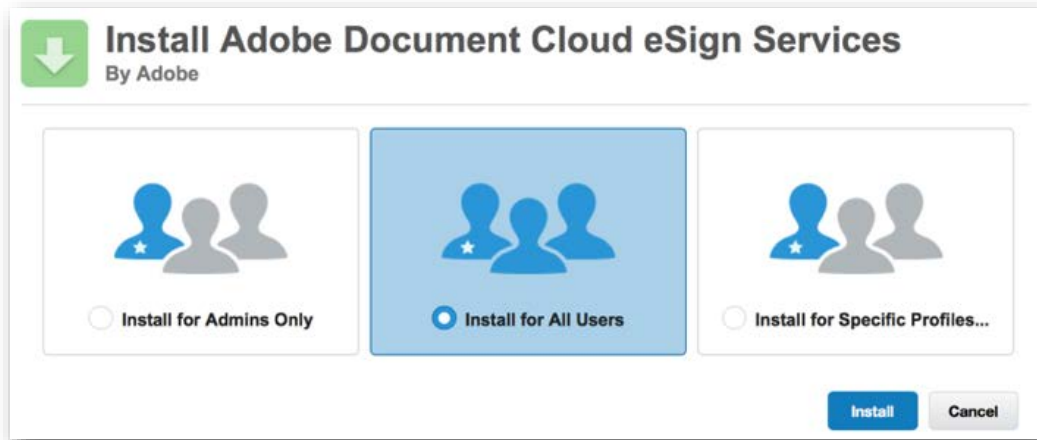
Quick Start Guide for Salesforce v17

Start sending agreements from eSign services for Salesforce in 15 minutes

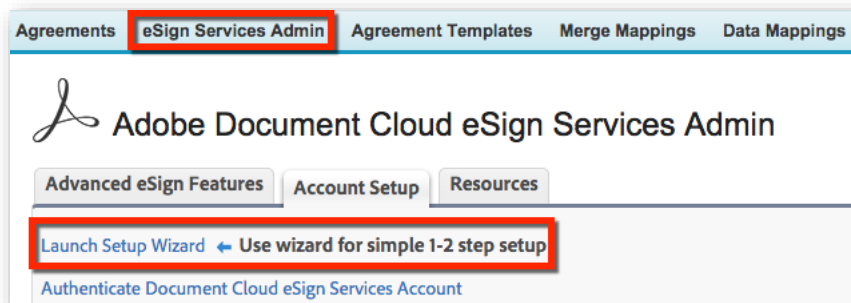
Installing and Setting Up Adobe Document Cloud eSign Services for Salesforce

1. Install the Adobe Document Cloud eSign services (formerly EchoSign) for Salesforce integration package from the Salesforce [AppExchange](#). (See the [installation and customization guide](#) for complete instructions.)

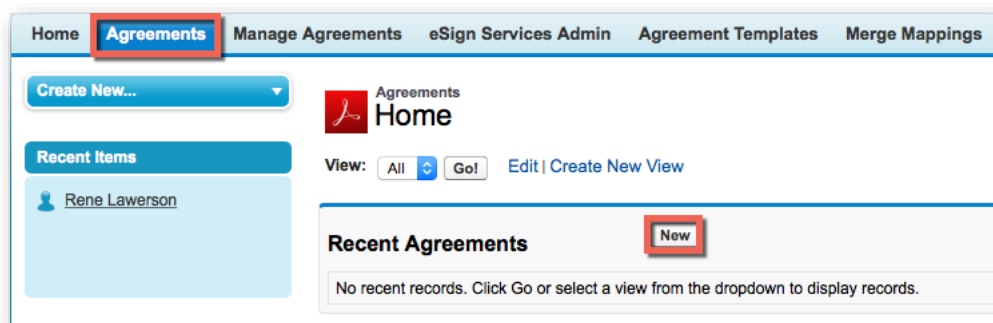
Note: Be sure to select "Install for All Users" during installation.



2. Once the package is installed, the Setup Wizard should launch automatically. If it does not, click the **eSign Services Admin** tab, click the **Account Setup** tab, then click the **Launch Setup Wizard** link as shown below. Make sure you complete both steps in the setup wizard.



It's as simple as that! You are now set up to send agreements from the Agreements tab.



Setting Up Merge Mappings and Data Mappings

You can easily set up a sample document with text tags to merge data from an Opportunity and push back data from signers into Salesforce. (See the Adobe Document Cloud eSign services [Text Tag Documentation](#) for more information).

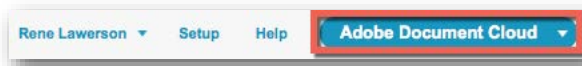
You can use this [sample document](#), which includes these two eSign services text tag fields:

- `{{*mergeOppNameFromSalesForce}}`—Field that the existing Opportunity name will merge into.
- `{{*updateOppNameInSalesForce}}`—Field that the signer will update with the new Opportunity name.

You can add this sample document to Salesforce files, documents, or libraries. Or just save it on your computer.

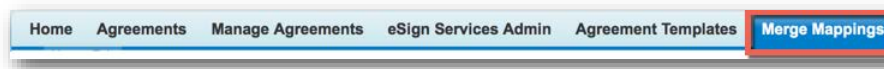
To set up the merge mapping and data mapping that are required, do the following:

1. To navigate to **Adobe Document Cloud**, select 'Adobe Document Cloud' from the Force.com App Menu at the far right.

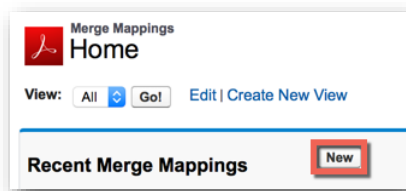


2. To create your merge mapping, do the following:

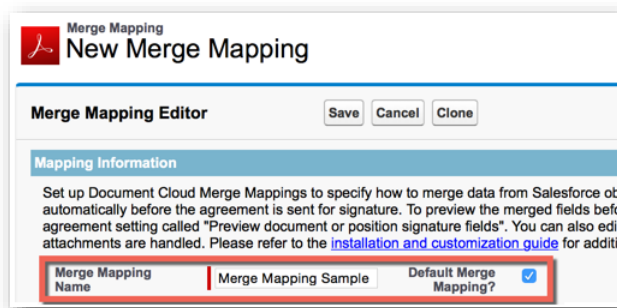
- a. Click the **Merge Mappings** tab.



- b. In *Merge Mappings Home* page, click the **New** button.



- c. In *New Merge Mapping* page, enter a 'Merge Mapping Name' and enable the 'Default Merge Mapping?' option.



- d. In the *Map Salesforce Object Fields to Document Fields* section, click the **Add Field Mapping** link.

Target Document Field	Source Type
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[Add Field Mapping](#)

Save Cancel Clone

- e. Specify the Target Document Field 'mergeOppNameFromSalesForce'.

Target Document Field	Source Type	Source Value	Disable	Actions
mergeOppNameFromSalesForce	Salesforce Object Field	Selected Object :	<input type="checkbox"/>	

[Add Field Mapping](#)

Save Cancel Clone

- f. Click the **Selected Object** link under 'Source Value' (shown above).
- g. In the *Object Selector* dialog, select 'Opportunity (Reference)' and 'Name (String)' for the Agreement field, then click the **Select** button.

Object Selector

Select a Source Field from Salesforce

Choose a field from the Agreement object or related objects

Agreement:

Opportunity (Reference)

Name (String)

Select Cancel

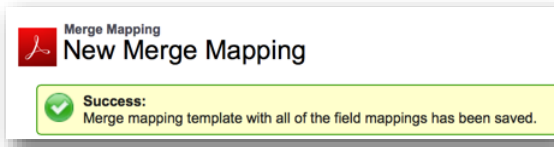
The resulting merge mapping row displays.

Target Document Field	Source Type	Source Value
mergeOppNameFromSalesForce	Salesforce Object Field	Edit : Opportunity : Name

[Add Field Mapping](#)

Save Cancel Clone

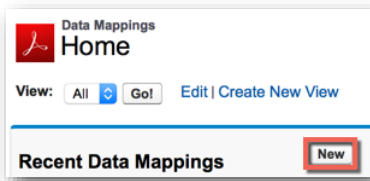
- h. Click **Save** to save the merge mapping. A confirmation message displays at the top of the page.



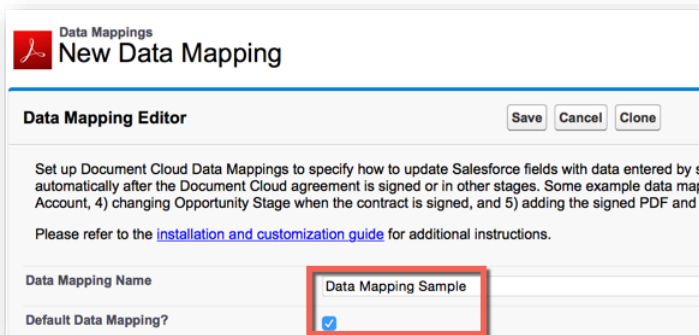
3. To create your Data Mapping:
- a. Click the **Data Mappings** tab.



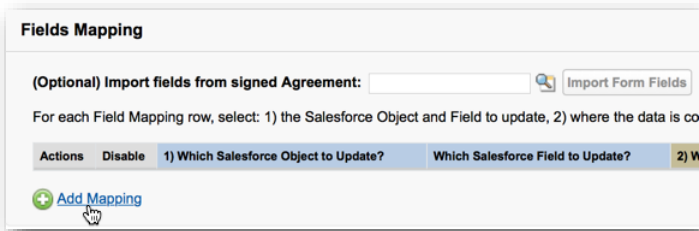
- b. In *Data Mappings Home* page, click the **New** button.



- c. In the *New Data Mapping* page, enter a 'Data Mapping Name' and enable the 'Default Merge Mapping?' option.



- d. In the *Fields Mapping* section, click the **Add Mapping** link.



- e. Click on the **Selected Object** link under 'Which Salesforce Object to Update?'.

The screenshot shows the 'Fields Mapping' dialog. At the top, there is an optional field for 'Import fields from signed Agreement' with an 'Import Form Fields' button. Below this, a table lists field mappings. The first row has the following columns: 'Actions' (with icons for add, delete, and edit), 'Disable' (a checkbox), '1) Which Salesforce Object to Update?' (containing the text 'Selected Object' which is highlighted with a red box), 'Which Salesforce Field to Update?' (empty), and '2) Where is the Data Coming From?' (containing 'EchoSign Form Field'). At the bottom left is an 'Add Mapping' button.

- f. In the *Object Selector* dialog, select 'Opportunity' and 'None', then click the **Select** button.

The screenshot shows the 'Object Selector' dialog. It has a title bar with a close button. The main content area says 'Selected Object: Opportunity'. Below this, it says 'Select the object to map data to based on the lookup relationship:'. There is a dropdown menu showing 'Opportunity' and another dropdown menu showing '--None--'. At the bottom are 'Select' and 'Cancel' buttons.

- g. In the 'Which Salesforce Field to Update?' field, select 'Name (String)'.

This screenshot is similar to the one in step e, but the 'Which Salesforce Field to Update?' column now contains a dropdown menu with 'Name (String)' selected and highlighted with a red box.

- h. In the 'Where is the Data Coming from Field?', select 'EchoSign Form Field'.

This screenshot is similar to the one in step g, but the '2) Where is the Data Coming From? - Select Type' column now contains a dropdown menu with 'EchoSign Form Field' selected and highlighted with a red box.

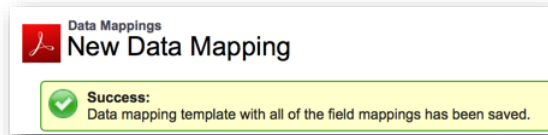
- i. In the 'What is the Value of the Data?' field, enter 'updateOppNameInSalesForce'.

This screenshot shows a close-up of the 'What is the Value of the Data?' column. It contains a text input field with the value 'updateOppNameInSalesForce' entered and highlighted with a red box.

The resulting data mapping row displays:

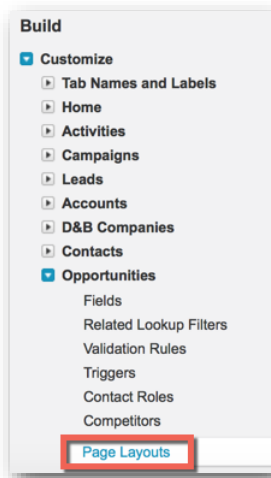
1) Which Salesforce Object to Update?	Which Salesforce Field to Update?	2) Where is the Data Coming From? - Select Type	What is the Value of the Data?
Opportunity	Name (String)	EchoSign Form Field	updateOppNameInSales

- j. Click **Save** to save the data mapping. A confirmation message displays at the top of the page.

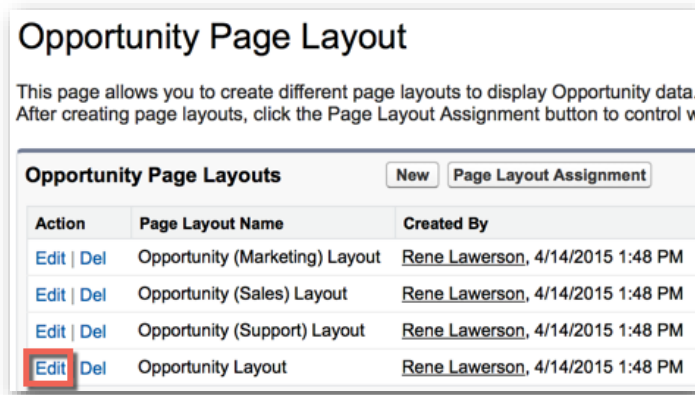


Sending an Agreement from an Opportunity

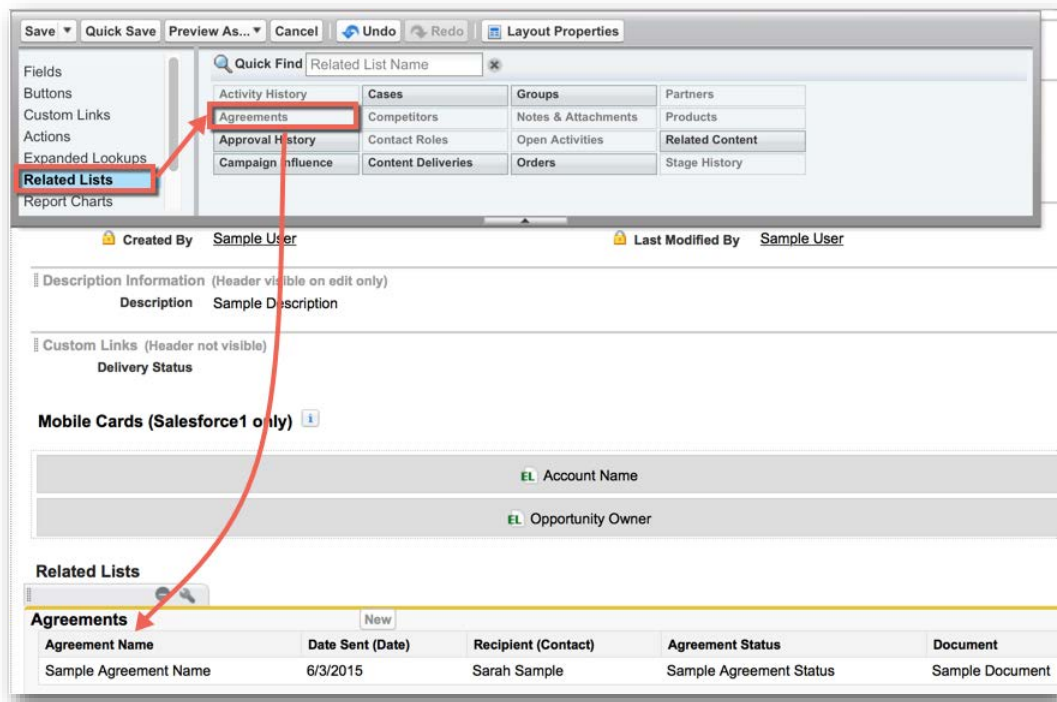
1. Click **Setup** then navigate to **Build | Customize | Opportunities | Page Layouts**.



2. On the *Opportunity Page Layout* page, click the **Edit** link for the 'Opportunity Layout' page layout.

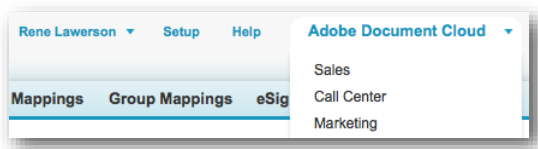


- On the page layout page, select 'Related Lists' and drag the 'Agreements' to the 'Related Lists' section.



See [Customizing Page Layouts with the Enhanced Page Layout Editor](#) in the Salesforce help for more information.

- Select **Sales** or **Marketing** from the Force.com App Menu at the far right.



5. Go to an Opportunity and under 'Agreements', click **New Agreement**.

The screenshot shows the 'GlobalCorp Opportunity' page. At the top, there's a navigation bar with links like 'Show Feed', 'Click to add topics', and 'Customize Page'. Below this is a breadcrumb trail: 'Agreements (0) | Products (0) | Open Activities (0) | Activity History (0) | Notes & Attachments (0) | Contact Roles (0) | Partners (0) | Competitors (0) | Stage History (1)'. The main section is 'Opportunity Detail' with buttons for 'Edit', 'Delete', and 'Clone'. It contains a table of fields: Opportunity Owner (Rene Lawerson), Amount (\$50,000.00), Private (checkbox), Expected Revenue (\$5,000.00), Opportunity Name (GlobalCorp Opportunity), Close Date (6/30/2015), Account Name (GlobalCorp), Next Step, Type, Stage (Prospecting), Lead Source, Probability (%) (10%), Order Number, Primary Campaign Source, Current Generator(s), Main Competitor(s), Tracking Number, Delivery/Installation Status, Created By (Rene Lawerson, 6/4/2015 9:52 AM), Last Modified By (Rene Lawerson, 6/4/2015 10:07 AM), Description, and Custom Links (Delivery Status). At the bottom, there's an 'Agreements' section with a 'New Agreement' button highlighted in a red box. Below this, it says 'No records to display'.

6. On the Agreement record, do the following:
 - a. Enter the email address of the recipient or select a recipient Type (Contact, Lead, User, or Email) and select a recipient.
 - b. Enter an 'Agreement Name'.
 - c. Upload/Attach a file from your desktop or select from your Salesforce documents, content, or files, then click **Done**.

The screenshot shows the 'Attach File' dialog box. It has a title bar with the Adobe logo and the text 'Attach File'. The main content area has three numbered steps: 1. 'Select the File' with instructions to type the path or click 'Browse', and a 'Choose File' button. 2. 'Click the "Attach File" button.' with instructions to repeat steps 1 and 2 for multiple files, and an 'Attach File' button. 3. 'Click the Done button to return to the previous page.' with instructions that this will cancel an in-progress upload, and a 'Done' button.

- Click the **Send for Signature** button and get the agreement signed.

Recipients

Type	Recipient	Email / Fax
Contact	Kristina Maggerstein	kmaggerstein@gmail.com

+ Add Recipient

I also need to sign this document

Host signing for the first signer

Send email copies to:

Agreement Detail

Agreement Name: GlobalCorp Sales Agreement

Message: Please review and sign this document.

Language: English (United States)

Signature Type: e-Signature

Opportunity: GlobalCorp Opportunity

Account: GlobalCorp Opportunity

Attachments

Title	Last Modified Date	Created By
GlobalCorp Sales Agreement - Sample Only.docx	2015.06.04 19:32:16	Rene Lawerson

Upload File OR Select from: Salesforce Documents | Salesforce CRM Content or Files

Document Cloud Actions

Send for Signature Save Agreement

Note: If you are not signed in to Adobe Document Cloud, you will be prompted to sign in to your account at this point.

During signing, you should see that the Opportunity name merged into the document automatically. Once the agreement is signed, the newly entered Opportunity name will be updated back in Salesforce.

Notes:

- If you have a custom field on an Opportunity, you can use that instead to test data mappings rather than updating the Opportunity name as the previous example demonstrates. Note that data entered in fields on an Adobe Document Cloud eSign services agreement need to match the field type in Salesforce. To make sure that data is pushed back into Salesforce successfully, start by pushing data into a text field that does not have any field validations in Salesforce.
- You can also use Agreement Templates to auto-populate default mappings, documents, recipients, and other agreement settings. With these templates, you can easily set up customized, automated agreement workflows with the single click of a Send for Signature button on an object.
- You can send from any object in Salesforce. Additionally, you can set up Chatter updates and send from a Chatter feed.
- Refer to the [installation and customization guide](#) for more details.

For more information

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