Adobe Sign

Data Mapping and Merge Mapping in Salesforce.

Adobe Sign, part of Adobe Document Cloud, the top-rated e-sign tool on the Salesforce AppExchange, brings the power of e-signatures and document management into the Salesforce platform for managing customer data. The Adobe tool is 100% native to Salesforce, so it blends seamlessly into the platform—users can prepare, send, track and manage signed documents without ever leaving Salesforce.

The most powerful feature of the tight integration is the ability to link data: You can merge existing Salesforce data into contracts and forms and map signer data back to Salesforce. This brings incredible efficiencies to business processes, with deals closed up to 5 times faster and records that automatically stay up-to-date. In this article, we show you how the merge mapping and data mapping features in Adobe Sign work—so you can unlock the full potential of your Salesforce integration.

Quick installation and configuration.
To start, download Adobe Sign from the Salesforce AppExchange. After installation, a wizard takes you through a few simple steps to configure it for sending documents directly from Salesforce.

Agreement templates.

Simplify sending in Salesforce.
Adobe has provided a tool in Salesforce called Agreement Templates that makes it fast and easy to send documents for signature. This is where you can link your Salesforce and e-signature data.

Agreement templates do not require any code and are easy to configure within the Salesforce functional UI. The following are just some of the settings that you can predefine for your "transaction":

- Security options such as identity verification method and signed document password protection
- Systematic reminders for signers
- Document archiving
- Merge mapping: pulling data stored in Salesforce into your business documents
- Data mapping: pushing data from signed agreements back into Salesforce
- Host signing option for in-person signing
- Document expiration dates
- Single-click sending
- Define signers and approvers

Merge mapping.

Merge data from any standard or custom object.
Configuring your agreement templates for automatic merge mapping and data mapping can save you a lot of time and reduce document and record error for NDAs, price quotes, sales contracts, employee onboarding forms and other contracts.

To set up merge mapping, follow these steps:

1. Place Text Tags on your document (PDF, Word, PowerPoint, Excel, .txt, .rtf or HTML file) for things like first name, last name, title and email address.

Text Tags example in Salesforce showing data fields to merge:
"mergeFirstName" and "mergeLastName".

2. Go to the Merge Mappings tab in Salesforce, and associate your Text Tags with data fields—these object fields can be from standard or custom objects or even objects from other apps downloaded from the AppExchange. There are no restrictions on what data can be merged or how many data points can be merged.

Merge mapping matches Text Tags to data fields in Salesforce. In this example, the tags "mergeFirstName" maps to the Contact first name, and the "mergeLastName" maps to the Contact last name.

3. Next, tie everything together in the Agreement Templates tab. There, you'll set up a new agreement template and add your documents, associated merge mapping and any settings for security, approval processes and so on. Review all your settings in the template prior to sending; your Text Tags will be merged with the Salesforce data fields when you send the form for signature.

Data mapping.

Collect data and write it back to Salesforce.

Utilize the Data Mapping tool to capture data from signed forms and push it back to your Salesforce records. Users commonly map contact information such as name, email address, phone number and mailing address. Other uses include mapping workflow fields such as Opportunity State—so that when a price quote gets signed, the Opportunity State changes to "Closed Won", for example. This saves a workflow step and ensures that status is current in the opportunity and forecast.

Data mapping even allows you to configure where your agreement and accompanying PDF files are stored—so you can attach the files to any object in Salesforce.

Configuring transactions for data mapping is similar to configuring merge mapping.

To set up data mapping, follow these steps.

1. Place Text Tags on your document for the data you want to capture from signed forms.

2. Go to the Data Mappings tab in Salesforce and associate your Text Tags with object fields in Salesforce. You can use data mapping for any field on any object in Salesforce. As with merge mapping, there are no limits to what can be mapped, nor are there any limits on how much data can be mapped.

s	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?
	☐	Account	Account Name (String)	EchoSign Form Field	mergeCompanyName
	☐	Account	Annual Revenue (Currency)	EchoSign Form Field	mergeRevenue
	☐	Contact	Last Name (String)	EchoSign Form Field	mergeLastName
	☐	Contact	First Name (String)	EchoSign Form Field	mergeFirstName

Setting up data mapping in Salesforce. Data fields like "mergeCompanyName" are configured to map back to the Salesforce Account object, flowing in the reverse direction to merge mapping.

3. Bring it all together in the Agreement Templates tab. Add your data mapping to your agreement template with associated files, settings and so on. Be sure to review your agreement template settings before sending. Data mapping will occur after the agreement is signed.

Data flow in merge mapping and data mapping.
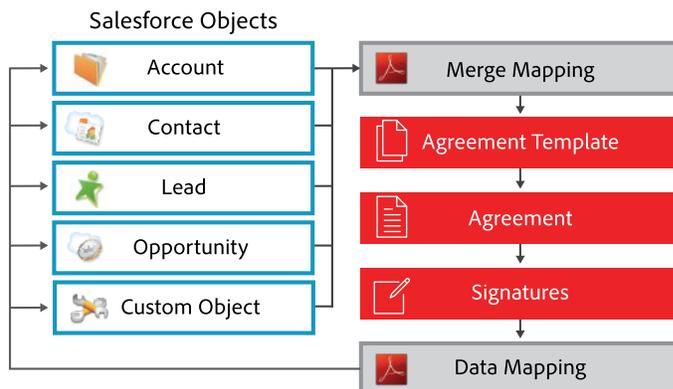
Advanced.

Automatic Apex triggers.
Because Adobe Sign for Salesforce is completely built on the Salesforce platform, the advanced capabilities are endless. You can configure an agreement template to send a form for signature from an Apex trigger—it just takes one line of code. (Apex is the proprietary language the Salesforce platform runs on.) Automatic triggers can be tied to existing buttons, workflows or other events—alleviating user error and delay.

For example, a company whose business involves sensitive information can set up a trigger to automatically send an NDA once a prospect has submitted a lead form. You can also use Apex to create agreement templates that meet very complex business requirements.

Integration with APTTUS and other Salesforce packages.
Adobe Sign integrates with other applications on the AppExchange, complementing the extended Salesforce functionality with e-signature capabilities. For example, you can use APTTUS to generate advanced price quotes and then leverage the Adobe tool to get e-signatures on those quotes. Adobe also works with document-generation partners like Drawloop to provide very complex data merging: Contracts generated in Drawloop can be easily sent for signature using Adobe Sign.

Resources.

- Adobe Sign for Salesforce video tutorials
- Adobe Sign for Salesforce guides and documentation
- Creating forms with Text Tags [PDF]