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Adobe® EchoSign for Salesforce v15 Installation and Customization Guide

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# Table of Contents

**ECHOSIGN FOR SALESFORCE OVERVIEW**  
ECHOSIGN FOR SALESFORCE OVERVIEW  5

**INSTALLING AND CONFIGURING ECHOSIGN FOR SALESFORCE V15**  
GET EchoSign FROM THE APPExCHANGE  5
BASIC SETUP STEPS AFTER UPGRADE OR INSTALLATION  7
SANDBOX TESTING  10
EchoSign SUPPORT  10
NEXT STEPS AFTER BASIC SETUP  10

**BASIC CUSTOMIZATION**  
ADD THE ECHOSIGN AGREEMENTS LIST ON THE CONTACT, OPPORTUNITY, ACCOUNT, LEADS AND CONTRACTS PAGE LAYOUTS  11

**SENDING AN AGREEMENT USING ECHOSIGN FOR SALESFORCE (IMPROVED!)**  
SENDING AN AGREEMENT USING ECHOSIGN FOR SALESFORCE (IMPROVED!)  12

**USING ECHOSIGN FORMS**  
KEY FEATURE ECHOSIGN DATA MAPPINGS – PUSH SIGNER DATA & FILES TO SALESFORCE RECORDS  15
ABOUT ECHOSIGN FORM FIELD DATA MAPPINGS  15
CREATING AN ECHOSIGN FORM FIELD DATA MAPPING (IMPROVED!)  16
CREATING AN ECHOSIGN FILE MAPPING  19
USING DEFAULT AND MULTIPLE DATA MAPPINGS  21
TROUBLESHOOTING  21

**KEY FEATURE ECHOSIGN MERGE MAPPINGS – GENERATE DOCUMENTS WITH SALESFORCE DATA**  
ABOUT ECHOSIGN MERGE MAPPINGS  22
CREATING AN ECHOSIGN MERGE MAPPING  22
USING DEFAULT AND MULTIPLE MERGE MAPPINGS  24
TROUBLESHOOTING  24

**KEY FEATURE ECHOSIGN AGREEMENT TEMPLATES AND ‘SEND TO ECHOSIGN’ BUTTON**  
ABOUT AGREEMENT TEMPLATES  25
CREATING AN AGREEMENT TEMPLATE (IMPROVED!)  25
‘SEND TO ECHOSIGN‘ BUTTON  34

**KEY FEATURE SEND AND MANAGE AGREEMENTS IN BATCH (NEW!)**  
CREATE AGREEMENTS IN BATCH (NEW!)  37
SEND AND MANAGE AGREEMENTS IN BATCH (NEW!)  38

**KEY FEATURE ECHOSIGN FOR SALESFORCE CUSTOMIZATION AND SETTINGS**  
KEY FEATURE ECHOSIGN FOR SALESFORCE CUSTOMIZATION AND SETTINGS  39

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ECHOSIGN FOR SALESFORCE OVERVIEW

Adobe EchoSign for Salesforce works from any browser and mobile device. The app available from the AppExchange and supports the following Salesforce Editions:

- Professional
- Enterprise
- Unlimited
- Developer
- Ultimate

With Adobe EchoSign, 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 to EchoSign' buttons to send custom agreements from any Salesforce object
- Native integrations with Conga Composer, Apttus, Selectica, Drawloop, Zuora, Emptoris, and more
- All EchoSign 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.

Release notes for EchoSign for Salesforce v15 can be found here.

INSTALLING AND CONFIGURING ECHOSIGN FOR SALESFORCE V15

New Customer Testing and Installing for the First Time – For those who are new to EchoSign for Salesforce, you can try installing and start sending test agreements within minutes. View the EchoSign for Salesforce Quick Start Guide for a quick tutorial and 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 EchoSign customers who need to upgrade to EchoSign for Salesforce v15 from a prior version.

GET ECHOSIGN FROM THE APPEXCHANGE

- Click here to view the Adobe EchoSign for Salesforce AppExchange listing
- Click the 'Get It Now' button
- Follow the instructions to determine where you would like to install EchoSign.
Follow the instructions to confirm and start the installation process.

- **Grant access so that Salesforce can securely access EchoSign**
  - In 'Step 2. Choose security level', **make sure to grant access to all users.**
  - **Note:** If you do not grant access to all users in your production account now, it will take additional configurations to grant them full access later on so it is recommended that you grant access to all users. For instructions on how to enable access for additional user profiles after installation, please refer to this [documentation guide](#) about extending access.

- **In 'Step 3. Install package', click the ‘Install’ button.**
  - **Note:** The installation process may take some time to complete. Salesforce.com will notify you by email when it is done.
  - When installation is completed, follow the [simple setup steps](#) to get started with Adobe EchoSign.
BASIC SETUP STEPS AFTER UPGRADE OR INSTALLATION

A few simple setup steps are required before you can start sending EchoSign agreements from Salesforce and this is accomplished by launching the setup wizard. After upgrading or installing EchoSign for Salesforce v15, please click on the EchoSign Admin tab.

If the Setup Wizard doesn’t launch automatically, please go to the Account Setup tab and click the link ‘Launch Setup Wizard’.

Step 1: Set up the 2 EchoSign IP Ranges as trusted ranges within Salesforce.

Close the popup window after saving each IP range.
Step 2: Enable automatic status updates by entering and saving your Salesforce username and password. Click the 'Save' button and when successfully saved, click the 'Next' button to continue.
Step 3: Copy the EchoSign API key from your EchoSign account and save it into Salesforce.

![EchoSign API Key Entry](image)

**Notes:**

1. Make sure you do not check the option 'Lock sessions to the IP address from which they originated' under Setup / Administration Setup / Security Controls / Session Settings.
2. If you run into issues sending agreements, you can contact EchoSign Support to ensure that your EchoSign account is slotted in the right channel for the Salesforce integration, which is the default for Salesforce users.
3. EchoSign 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.
4. If you are using Salesforce Professional Edition, you will need to complete installation by following the additional steps in the section EchoSign for Salesforce Professional Edition - Additional Installation Steps.

**CONGRATULATIONS!**

YOU HAVE SUCCESSFULLY INSTALLED AND SET UP ECHOSIGN FOR SALESFORCE.

TRY SENDING AN AGREEMENT AND EXPERIENCE ECHOSIGN FOR THE FIRST TIME.

After the initial setup, the EchoSign Admin tab is a useful page you can come back to access links to EchoSign features, setup configurations, and other resources.
SANDBOX TESTING

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 EchoSign account 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 EchoSign account will be tied to an email address that does not exist and cannot be verified to make email changes.

ECHOSIGN SUPPORT

For questions and additional assistance, please visit the Adobe EchoSign Support portal.

If you are running into issues configuring Adobe EchoSign for Salesforce or sending agreements, you can also contact your designated Client Success Manager for assistance.

NEXT STEPS AFTER BASIC SETUP

EchoSign for Salesforce is now installed in your Salesforce organization. The following are some optional next steps for further customizing and using EchoSign 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 some key features mentioned below that you can explore to further optimize and automate your signature workflows.

1. BASIC CUSTOMIZATION

- Start sending agreements.
- Add the EchoSign Agreement List to Contacts, Opportunities, Accounts, Leads and Contracts.

2. ADVANCED CUSTOMIZATION AND SETTINGS

- Advanced Customization Options - Add the EchoSign Agreement List to other Salesforce objects, customize agreement fields, and more.
- EchoSign for Salesforce Custom Settings (Improved!) ✔KEY FEATURE - Change EchoSign for Salesforce behavior and available options.

3. ENABLE ADVANCED FEATURES

- EchoSign Data Mappings ✔KEY FEATURE - Map form field data entered by signers and push EchoSign files back into Salesforce objects.
• **EchoSign Merge Mappings** ✔**KEY FEATURE** – Merge data from Salesforce objects into form fields in EchoSign agreements before they are sent for signature.

• **Agreement Templates and Send to EchoSign Button** ✔**KEY FEATURE** – Set up default values and settings for your agreements ahead of time. Also optionally link an agreement template to a ‘Send to EchoSign’ button on a Salesforce object. (e.g. Opportunity)

• **Advanced Signer Authentication Methods** – Add additional level of verification of signers’ identity through Knowledge Based Authentication or Web Identity verification.

• **EchoSign Chatter Integration** – Set up EchoSign for Chatter to get Agreement status updates to your Chatter feed. Send agreements from directly within Chatter with Chatter Actions.

• **Send and Manage Agreements in Batch** – Create agreement records in batch through a simple query. Send and manage multiple agreements with a single action.

• **EchoSign Group Mappings** - Synchronize users in Salesforce profiles with your EchoSign groups.

• Configure Salesforce Sites if your users may be sending large transactions over 2.8MB

• **Updating Salesforce with Agreements Sent Outside of Salesforce** – Even if you send agreements or create EchoSign Widgets directly through the EchoSign API or send agreements from EchoSign.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 EchoSign Account** – To control access, require that your Salesforce.com users be signed on to Salesforce to access their EchoSign accounts.

**BASIC CUSTOMIZATION**

**ADD THE ECHOSIGN AGREEMENTS LIST ON THE CONTACT, OPPORTUNITY, ACCOUNT, LEADS AND CONTRACTS 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.

• Go to Setup / Customize / Contacts / Page Layouts
Click 'Edit' next to Contacts Layout

Click on 'Related Lists' then drag and drop the ‘Agreements’ list to the desired place on the page layout

Click ‘Save’

**SENDING AN AGREEMENT USING ECHOSIGN FOR SALESFORCE (IMPROVED!)**

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

1. 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 check the box for "host signing" to obtain in-person signatures. For the "Send email copies" field, you can use commas, spaces, or semi-colons to list out any number of emails that need to be copied on notifications for this agreement.
2. Name the agreement, type a message, select signature type and language. Select the related Opportunity or Account.
3. Select the relevant sending options such as expiration date, reminders, or check the option "Preview document or position signature fields".
4. Select the security options such as a password for the signed PDF
5. Attach files from your computer or from the Salesforce Documents or from Salesforce Files and Content or EchoSign Document Library. If you have multiple file attachments, you can reorder them before sending by dragging the documents up or down.
6. Click the ‘Send for Signature’ button
When the agreement is out for signature, you can replace the current signer by clicking on the replace signer icon 🔄. Select the contact, user, lead record of the new signer and then click the checkmark to save it. Note that the blue arrow pointing to a recipient indicates who the current signer is in the workflow. You can enable the ability to replace the signer in custom settings.
MANAGE AGREEMENTS

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

Adobe EchoSign 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 EchoSign template library by storing EchoSign forms and templates in your Salesforce Documents tab.

EchoSign 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.
- Merge data from Salesforce into document fields before sending for signature. Learn more about setting up merge mappings.

You can create EchoSign forms by adding special text tags in any document you send through EchoSign (Word, PDF, Text, etc.). For more details read our Text Forms Tutorial.

KEY FEATURE

ECHOSIGN DATA MAPPINGS – PUSH SIGNER DATA & FILES TO SALESFORCE RECORDS

EchoSign form field data mapping lets you define how EchoSign 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 EchoSign 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 ECHOSIGN FORM FIELD DATA MAPPINGS

EchoSign Data Mappings update Salesforce objects when an EchoSign 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 EchoSign form field, a specific constant value or a value from an EchoSign Agreement Field. The target for each data mapping item may be any field in any Salesforce object that can be referenced from the EchoSign 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.
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 AN ECHOSIGN FORM FIELD DATA MAPPING (IMPROVED!)

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

1. Select ‘EchoSign’ on the menu at the top right of the screen
2. Click the ‘EchoSign Data Mappings' tab
3. Click ‘New’
4. 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. In that case, you can assign it to an Agreement Template that can be run when
5. Use the **Fields Mapping** table to define data mappings to Salesforce fields. There are a couple ways to specify the EchoSign agreement fields for where the data is coming from.

One method is to just type the EchoSign field name into the column **What is the Value of the Data?**. See example below:

<table>
<thead>
<tr>
<th>2) Where is the Data Coming From?</th>
<th>What is the Value of the Data?</th>
</tr>
</thead>
<tbody>
<tr>
<td>EchoSign Form Field</td>
<td>PONumber</td>
</tr>
<tr>
<td>EchoSign Form Field</td>
<td>FirstName</td>
</tr>
<tr>
<td>EchoSign Form Field</td>
<td>LastName</td>
</tr>
<tr>
<td>EchoSign Form Field</td>
<td>BillingStreet</td>
</tr>
</tbody>
</table>

**Optional: Import Fields from an Existing Agreement**

If you want to import a list of EchoSign form field names to map data from by selecting an existing agreement that was sent for signature and signed. You may import fields from multiple agreements to add additional fields.

*Note:* If you do not have any custom EchoSign fields in the document to import from, you will not be able to import the standard default EchoSign 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.

- Click 'Import Form Fields' button
- The number of fields imported will be displayed

6. You can add mapping rules to update fields to any related Salesforce object. You can create a mapping to any field (including custom fields).

7. Click 'Add Mapping'
8. 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
   - 'EchoSign Form Field', 'Constant', 'Agreement Field'

2b) What is the Value of the Data?

   Depending on what type of data you are mapping to Salesforce, you will see the following:

   1. ‘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.

   2. ‘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.

   3. ‘Agreement Field’ – Select an EchoSign Agreement Field

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

   1. Signed/Approved
   2. Waiting for Counter-Signature/Approval
   3. Out for Signature/Approval
   4. Cancelled / Declined
   5. Expired (New!)
9. There are other Field Mapping Settings that you can enable if needed:

- **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 EchoSign agreement is empty, do not write the empty value into the target Salesforce field using this mapping rule.

10. **Disable** – If checked, this row in the mapping will not execute.

**CREATING AN ECHOSIGN FILE MAPPING**

1. To map the EchoSign signed agreement or audit trial to the selected target Salesforce object, use the **File Mapping** table.

2. For each File Mapping row, select:
   1. **Which Salesforce Salesforce Object to Update?** - Select the target Salesforce object where the data will be copied
   2a) **How Do You Want to Add the File?** -
      - If you select *Add a reference link to the file*, that will provide the URL to get the signed agreement PDF.

   - **Signed Agreement – Merged PDF**
   - **Signed/Approved**
   - **Signed Trial**
   - **Signed/Approved**

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• If you select ‘Attach file directly to object’, that will 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?** – this applies if you select ‘Add a reference link to the file’, You will need to select the target field where 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?**

- **Signed Agreement – Merged PDF:**
  - 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:**
  - 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**
  - This pushes back the audit trail in PDF format back to the Salesforce object record.

- **Supporting Documents**
  - This pushes back any supporting documents that are uploaded by the signers back to the Salesforce object record.

**Note:** If you have a custom URL in Echosign 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. Go to Setup > Security Controls > Remote Site Settings > New Remote Site. Add your EchoSign 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 the specified status.

1. Signed/Approved
2. Waiting for Counter-Signature/Approval
3. Out for Signature/Approval
4. Cancelled / Declined
5. Expired (NEW!)
3. Click ‘Save’ to save the mapping

**USING DEFAULT AND MULTIPLE DATA MAPPINGS**

You may 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 may also 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 may 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, which can also let you set up other default fields and options for your agreements. See Agreement Templates section for more information.

**TROUBLESHOOTING**

Salesforce fields have validation rules that may cause a mapping to fail. For example, if you map an EchoSign 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 EchoSign Form Field validation rules where possible to ensure data entered by signers can be pushed into Salesforce. EchoSign standard PDF form fields validation rules from PDF documents and allows you to create validation rules when using EchoSign Text Tags - See this tutorial 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 EchoSign 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 additional data mapping errors will be sent to the owner of the data mapping by email. Go to Setup / Develop / Custom Settings (EchoSign) to enable or disable the email notification using the setting called ‘Enable Mapping Error Notification’. To enable the ‘Data Mapping Error’ field, follow the steps here and drag the field to the page layout.
EchoSign 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.

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

ABOUT ECHOSIGN 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 EchoSign Agreement. The target for each merge mapping item is a designated field from an EchoSign agreement.

For example, the mapping below updates the EchoSign document fields for first name and last name with the Salesforce Recipient (Lead) field data. It also fills in the company field in the document with the value 'Acme Corporation'.

CREATING AN ECHOSIGN MERGE MAPPING

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

1. Select ‘EchoSign’ on the menu at the top right of the screen
2. Click the ‘EchoSign Merge Mappings’ tab
3. Click ‘New’
4. 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.
5. To get a list of EchoSign form field names you can map data from, select an existing agreement that was sent for signature and signed. You may import fields from additional agreements to add additional fields. Fields with duplicate names will not be imported twice.

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

7. Click the 'Import Form Fields' button

8. The number of fields imported will be displayed

9. You can add mapping rules to merge data into EchoSign documents. You can create a mapping from fields that can be referenced from the EchoSign Agreement object (including custom fields).

10. Click ‘Add Field Mapping’

11. Define mapping rules through the following selections:
   - **Target EchoSign Document 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.
   - **Source Type** – ‘Salesforce Object Field’ or ‘Constant’
Source Value – Depending on the Source type, you will see the following:
- ‘Salesforce Object Field’ – When you then click on ‘Select Field’, this will open a window for you to select the Salesforce source object field.
- ‘Constant’ – Type a specific value
- Disable – If checked, this mapping row will not execute.

12. 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 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 would be executed if this field is left empty.

**TROUBLESHOOTING**

Salesforce fields have validation rules that may cause a mapping to fail. For example, if you map Salesforce email field to an EchoSign 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_Mapping_Error__c) field on the EchoSign 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 additional data mapping errors will be sent to the owner of the data mapping by email. Go to Setup / Develop / Custom Settings (EchoSign) to enable or disable the email notification using the setting called ‘Enable Mapping Error Notification’. 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 section for more information.
EchoSign 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 to EchoSign’ 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 (Account, Opportunity, or 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 to EchoSign’ 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 (IMPROVED!)

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

- Select ‘EchoSign’ on the menu at the top right of the screen
- Click the ‘Agreement Templates’ tab
- Click ‘New’

- Enter a name for the agreement template and then you can also define the fields and options you want to set up for your template.

DEFINE TEMPLATE INFORMATION

- **Master Object Type** - The Master Object Type is 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 that look up to fields and data in the Master Object or data from lookup objects. Examples of a Master Object include ‘Opportunity’, ‘Lead’, and ‘Account’. 
If you have a Master Object defined in the Agreement Template, you should initiate the agreement from a 'Send to EchoSign' button on the Master Object. See this section for more information about how to enable a default button or create new 'Send to EchoSign' buttons.

- **Default** - Decide 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 to EchoSign' 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** - 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 hits a 'Send to EchoSign' button from a Salesforce record, then you can check the 'Auto Send' box. For 'Auto Send' to work, you need to 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 EchoSign Chatter Publisher Action allow users to send agreements from Chatter. Check this box to enable this agreement template for the EchoSign 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 EchoSign Chatter Publisher Action.

**DEFINE AGREEMENT INFORMATION**

- Enter an Agreement Name. Optionally, add a message and select a signature type and recipient language.

- **Note:** Keep in mind that for text fields in the agreement template (e.g. Agreement Name, Message, etc.), 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.

**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:

---

**Example 2: Custom Object as Master Object**

**Custom Lookup Field on the Opportunity:** Student__c

**Agreement Template Definition:** AgreementTemplateProcess 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}

---

**DEFINE AGREEMENT OPTIONS**

- Select from a set of agreement options that are available including:
- Email Copy To
- Automatic Reminders
- Signature Flow (NEW!)
- Sender Signature Order
- Send On Behalf Of
- Enable Hosted Signing
- Enable Preview and Position Fields
- Use Fax Number
- Days Until Expiration – Note: The days until expiration that you enter will be added to the current date to calculate the expiration date dynamically when the agreement record is generated from the agreement template.

Note: For any 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' 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. If you are using the 'Send on Behalf of' functionality, make sure to enable it first by following these instructions.

Note: The option 'Allow Signers to Suggest Revisions' is no longer available in EchoSign so you can remove the deprecated field from the layout.

### DEFINE SECURITY OPTIONS

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<thead>
<tr>
<th>Agreement Security Options</th>
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<tbody>
<tr>
<td><img src="image" alt="Security Options" /></td>
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</table>

- Optionally, choose the Signer Verification Method for signers in your EchoSign account and signers outside of your EchoSign account:
  - Password to sign agreement
  - Knowledge based authentication
  - 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.
- Optionally, assign a password to open the PDF of the signed agreement

### DEFINE MAPPING SETTINGS

<table>
<thead>
<tr>
<th>Mapping Settings</th>
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<tbody>
<tr>
<td><img src="image" alt="Mapping Settings" /></td>
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</table>

- If you have a merge mapping or data mapping that you want to automatically run with agreements using this agreement template, then specify the mappings in this section.
DEFINE REFERENCED OBJECTS

- Automatically 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.

ADD RECIPIENTS

- Make sure to save your agreement template to view this section called 'Add Recipients'.
- Click on 'New Add Recipient'

- Select one of the following ways to specify your recipient:
  - Predefine the Recipient
  - Look Up Based on Master Object Field
  - Opportunity Primary Contact Role
  - Opportunity Contact Role
  - All Opportunity Contact Roles
  - Account Primary Contact Role
  - Account Contact Role
  - All Account Contact Roles
  - Runtime variable

- Select the Recipient Type:
  - Contact
  - Lead
  - User
  - Email

- Select the Recipient Role:
  - Signer
  - Approver

- Select the Signer Verification Method: (NEW!)
  - Email
  - Password
  - Social
  - KBA
  - Phone
  - Note: Make sure your EchoSign account is enabled for these methods in order to use them in Salesforce.
• If you selected ‘Predefine the Recipient’, then simply select the recipient in the next screen.

• If you selected ‘Look Up Based on Master Object Field’, 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 the next 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.

• When the Master Object is Account or Opportunity, you can also enable the following:
  o If you selected ‘Opportunity Primary Contact Role’ or ‘Account Primary 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. If used, the primary contact in the Opportunity/Account will be used as a recipient in the agreement.
  o 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 the next 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.

• If you selected ‘Runtime variable’, this will give you the ability to specify a Recipient ID in SFDC URL when specifying an recipient for the agreement template.
  o You will need to specify the variable here (e.g. myRecipient)
Then in the 'Send to EchoSign' 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 to EchoSign' 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 Step 2 blank.

---

**ADD FILE ATTACHMENTS**

- Make sure to Save your agreement template to view this section called 'Add File Attachments'.
- Click on 'New Add File Attachment'
Select one of the following ways to specify your file attachment:

- Document from Content
- Document from EchoSign Library (NEW!)
- Document from Library (Salesforce library)
- Document from Master Object
- Quote Document from Master Quote (if Master Object is Quote)
- Quote Document from Opportunity Quote (if Master Object is Opportunity)
- Runtime variable

- If you selected ‘Document from EchoSign Library’, then simply select from the EchoSign document templates in the next step.
- If you selected ‘Document from Library’, then simply select from the Salesforce documents in the next step.
- If you selected ‘Document from Content’, then simply select from the Salesforce Content or Files documents in the next step.
- If you selected ‘Document from Master Object’, 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. For example, the master object may be ‘Opportunity’. In the next screen, select the criteria by which your file attachment will be determined:
  - 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
  o Selection Determined By:
    • Last Modified Date
    • Created Date
• If you selected 'Runtime variable', this will give you the ability to specify an Attachment ID on the Master object and Recipient ID in SFDC URL when specifying an attachment for the agreement template.
  o You will need to specify the variable here (e.g. myRecipient or myAttachment)

Then in the 'Send to EchoSign' 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 to EchoSign' buttons.

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

**ADD FORM FIELD TEMPLATES**

• Form field templates can be created in EchoSign 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. Currently only one form field template can be selected per transaction but 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.

MAP DATA INTO AGREEMENT FIELDS

- Make sure to save your agreement template to view this section called ‘Map Data into Agreement Fields’.
- Click on 'New Map Data into Agreement Field'

- Select one of the following mapping methods:
  - Input Specific Value
  - Select Master Object Field

- If you selected ‘Input Specific Value’, then input a target field value in the next screen. Also, select the target Agreement object field where your inputted value will be mapped.
- If you selected ‘Select Master Object’, 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, 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.

'SEND TO ECHOSIGN' BUTTON

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

Here is an example for the Opportunity object:

- To enable the ‘Send to EchoSign’ button for the Opportunity object, go to Setup / Customize / Opportunities / Page Layouts.
- Click on Edit ‘Opportunity Layout’
- Drag the Button ‘Send to EchoSign’ from the top section to the ‘Custom Buttons’ box in the Opportunity Detail section.
• To create additional custom ‘Send to EchoSign’ buttons for other objects, go to the Setup / Customize / (Object) / Buttons and Links. You can label the button to meet your needs.
• Click ‘New’ under ‘Custom Buttons and Links’
• 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 to EchoSign’ button, then the button path should be:
    /apex/echosign_dev1__AgreementTemplateProcess?masterid={!Object.Id}&templateId=a01U000004pImM 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.
  o Example: You can define a ‘Send to EchoSign’ 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 to EchoSign' 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, go to this section.
- Alternatively, you can map the 'Send' value to the 'On Load Action (Picklist)' field on the Agreement record. You can define this mapping in the Agreement Templates section called 'Map Date to Agreement Fields'.

- Click 'Save'.
- Then go to the Page Layout for that object and add the 'Send to EchoSign' button to the page similar to the steps mentioned above for the Opportunity example.
Create agreement records in batch by going to the object called EchoSign Batch Agreements.

Enter any query to narrow down the records for the master object. When you click on the button Create Agreements, one agreement record will be created for each of these queried records based on the Agreement Template you specify.

Here are some examples of queries that can be used to narrow the list of records that will be used to create an agreement record.

1. **Select all opportunities**
   - SELECT Id from Opportunity

2. **Select all leads which came from phone inquiries from Acme corp:**
   - SELECT Id from Lead where LeadSource = 'Phone Inquiry' and Email LIKE '%acme.com'

3. **Select all contacts under accounts of type Prospect, created since yesterday and who have not opted out of emails.**
   - SELECT Id from Contact where Type = 'Prospect' and CreateDate > YESTERDAY and HasOptedOutOfEmail = false

4. **Select all leads from a 2014 Dreamforce campaign**
   - SELECT Id from Lead where Campaign.Name = '2014 Dreamforce Campaign'

Once submitted, the agreements will be sent for a batch job and when completed, you can view them in the Agreement object list view.
SEND AND MANAGE AGREEMENTS IN BATCH (NEW!)

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

EchoSign for Salesforce supports various custom settings:

- **EchoSign Settings** control which features are exposed to your EchoSign users and also sets the application's behavior. This is the main set of core settings for the application.
- **EchoSign Toolbar Settings** control which buttons appear in the EchoSign Toolbar.
- **EchoSign Merge Mapping Settings** control how attachments are handled whenever there is a merge mapping used.
- **EchoSign Push Mapping Settings** control how recipient records are created or updated when agreements created outside of Salesforce are pushed into Salesforce.
- **EchoSign 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 EchoSign for Chatter app installed on your org.

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 on your Name on top corner of page
2. Click Setup / App Setup / Develop / Custom Settings
   - Click on the 'EchoSign Settings' or 'EchoSign Toolbar Settings' or 'Merge Mapping Settings' or 'Push Mapping Settings'; link, as appropriate.
   - The examples below show 'EchoSign Settings'

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**Custom Settings**

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Force.com Web Services API.

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

5. Set the appropriate settings. Click 'Save'

6. For more details on each setting, see 'Available Settings' below

**SETTINGS FOR SPECIFIC USERS AND PROFILES**

Follow steps 1-4 above.

5. 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).

6. Choose the user or profile you’d like to change these settings for and set values for the appropriate settings.

For more details on each setting, see the following ‘Available Settings’ section.

AVAILABLE ECHOSIGN SETTINGS

CUSTOM ECHOSIGN SETTINGS

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

- **Action Window Type** – Determine how EchoSign 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** – Check this box to attach the PDF of the audit trail to the Agreement record after the agreement is signed.
- **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 Signed PDF as Separate Attachments** – Check this box 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 EchoSign 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 Supporting Files to Attachment List** - Check this box 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** – Check this box to allow sending agreements on behalf of others.
• **Auto-Sync Group Mappings** – Check this box to automatically move the correct EchoSign groups when their Salesforce user profiles are updated.

• **Hide Salesforce Documents Attachments** – Enable this setting to hide the option to add Salesforce Content or Files to draft agreements.

• **Callback URL EchoSign to Salesforce Site** – Entering the Callback URL into this box is required when sending large transactions over 2.8MB. This setting is the Secure Web Address that is copied from the EchoSign Callback Site, which is set up to send large files. See this section in this document for additional instructions.

• **Hide Ability to Add Field Templates (NEW!)** - Enable this setting to hide the link which allows senders to “Add Form Field Template” on draft documents.

• **Hide Account Lookup** – Check this box to hide the Account lookup option on the send agreement page.

• **Hide Add Recipient** – Check this box to hide the option to add recipients on the send agreement page.

• **Disable Agreement Chatter Feed** – Enable this setting to turn off the Chatter feed on the Agreement object.

• **Hide Salesforce Documents Attachments** – Enable this setting to hide the option to add Salesforce Documents to draft agreements.

• **Hide Send Email Copies** – Check this box to hide the ‘Send email copies to:’ field on the send agreement page.

• **Disable Contact Recipient Type** – Check this box to hide the option to select a Contact as a recipient on the send agreement page.

• **Hide Salesforce Content/Files Att.** – Enable this setting to hide the option to add Salesforce Content of Files to draft agreements.

• **Hide Delete Agreement Attachments** – Check this box to hide the option to delete agreement attachments on the send agreement page.

• **Hide Delete Recipient** – Check this box 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.

• **Disable Edit Agreement Attachments** - Check this box to hide the option to edit agreement attachments on the send agreement page.

• **Disable Email Recipient Type** – Check this box to hide the option to type an Email address as a recipient on the send agreement page.

• **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.com have KBA enabled so you can use it in Salesforce.

• **Disable Lead Recipient Type** – Check this box to hide the option to select a Lead as a recipient on the send agreement page.

• **Hide Opportunity Lookup** – Check this box to hide the Opportunity lookup option on the send agreement page.

• **Hide Preview or Position** - Check this box to hide the option to preview the document or position fields on the send agreement page.

• **Hide Replace Signer (NEW!)** – Enable this setting to hide the ability to replace the current signer or approver after the agreement has been sent.

• **Hide Sender Signs** – Check this box to hide the option for the sender to also sign the agreement.
• **Hide Sign Expiration** – Check this box to hide the option to set the number of days before the agreement will expire on the send agreement page.

• **Hide Signing Password** – Check this box to hide the option to set a password to required to sign an agreement.

• **Hide Sign Reminder** – Check this box to hide the option to set a reminder for signers on the send agreement page.

• **Hide Signature Type** – Check this box to hide the option select a signature type (e-Signature or Fax Signature) on the send agreement page.

• **Hide Reorder Attachments (NEW!)** - Enable this setting to hide the sort attachments option for draft agreements.

• **Hide Reorder Recipients (NEW!)** - Enable this setting to hide the sort recipients option for draft agreements.

• **Hide Upload Agreement Attachments** – Enable this setting to hide the option to upload local files for draft agreements.

• **Disable User Recipient Type** – Check this box to hide the option to select a User as a recipient on the send agreement page.

• **Hide View Agreement Attachments** – Check this box to hide the option to disable viewing of attachments on the send agreement page.

• **Hide Password for Signed PDF** – Check this box to hide the option to set a password to open the PDF for the signed agreement.

• **Disable Social Identity Verification** – Check this box 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.com have web identity enabled so you can use it in Salesforce.

• **Show Hosted Signing Option** – Check this box to show the ‘Host signing for the first signer’ field on the agreement page to get in-person signatures.

• **Show EchoSign Library Attachments (NEW!)** - Enable this setting to show the option to add EchoSign document templates.

• **Show EchoSign Field Templates (NEW!)** - Enable this setting to show the option to select and apply EchoSign form field layer templates on documents.

• **Enable Mapping Error Notification** – Check this box to send email notifications to the data mapping or merge mapping owner any time there are errors when the mappings are executed.

• **Enable Phone Authentication (NEW!)** - 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** – Check this box 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 Per Signer Identity Verification (NEW!)** – Enable this setting to allow each signer to have a different identity verification method. (e.g. password, phone, social identity, KBA)

• **Show Recipient Signing Order Options (NEW!)** - Enable this setting to show 2 options for recipient signing: serial (ordered entered) or parallel (in any order)

• **Enable Send Written Signature To Fax** – Check this box and EchoSign will attempt to use the recipient’s fax number instead of the email address when sending an agreement for fax signature.

• **Enable Separate Signer Identity Methods** – Check this box to enable the option to select different identity verification methods for recipients in your EchoSign account and those outside of your EchoSign 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.

- **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 sendig
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 Preview or Position** - Enable this setting to make the "Preview document or position signature
fields" checkbox a read-only agreement field.

- **Read Only Recipient Signing Order Options (NEW!)** - Enable this setting to make the
options for recipient signing order read-only on an agreement

- **Read Only Recipient** - Enable this setting to make the Recipients section 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 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.

- **Read Only Signature Type** - Enable this setting to make the Signature Type field a read-only agreement
field.

- **Rename Agreement with Attachment Name (NEW!)** – Rename the agreement using the name of the
attached document

- **Wipe Agreement Password** – Check this box 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.
**ECHOSIGN TOOLBAR SETTINGS**

Toolbar settings allow you to control which EchoSign 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.
- **Save Agreement** - Saves the agreement.
- **Send Agreement** - Sends an agreement for signature.
- **Send Reminder** - Send a reminder to the current signer.
- **Update Status** - Queries EchoSign to update the status of the agreement in Salesforce.
- **View Agreement** - Opens the EchoSign 'View Agreement' page allowing the user to view it and perform additional tasks.

**ECHOSIGN 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.

**ECHOSIGN 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.

- **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.
- **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.
- **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.

ECHOSIGN CHATTER SETTINGS

EchoSign Chatter Settings will appear if you have the EchoSign 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 EchoSign for Chatter here with instructions for installation and setup.

- Post on Account Record - Post Chatter updates for EchoSign agreements on the related Account record.
- Post when Agreement Cancelled - Post Chatter update when agreement is cancelled.
- Post when Agreement Declined - Post Chatter update when agreement is declined.
- Post when Agreement Expires - Post Chatter update when agreement expires.
- Post on Agreement Record - Post Chatter updates for EchoSign agreements on the Agreement record.
- Post when Reminders Sent - Post Chatter update when reminders are sent.
- Post when Agreement Sent - Post Chatter update when agreement is sent.
- Send Notifications to Sign Agreements - Post private Chatter message to signer when an agreement needs the signer’s signature.
- 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 on Contract Record - Post Chatter updates for EchoSign agreements on the related Contract record.
- Enable EchoSign Chatter Updates - Enable this setting to turn on Chatter updates for EchoSign agreements.
- Post on Opportunity Record - Post Chatter updates for EchoSign agreements on the related Opportunity record.
- Post when Recipient Email Bounces - Post Chatter update when recipient email bounces and is not delivered.

Note: There is another Chatter setting in the main EchoSign 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’.
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 ‘EchoSign Agreement Advanced’ page. These customizations are not available when using the ‘EchoSign Agreement Basic’ page. See Select EchoSign Agreements Page Style 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 EchoSign built-in field set and then add one or more fields from the Agreement Object that will be displayed on the agreement page.

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

- Go to Setup / Create / Objects

  ![Objects](image)

  ![Agreement](image)

- Click on ‘Agreement’
• Mouse over ‘Field Sets (Beta)’ at the top and the click ‘Edit’

• Select the field you want to add and drag it into the ‘In the Field Set’ rectangle. Notice that EchoSign only supports fields from the Agreement object and not from other objects.

• Click ‘Save’
• When you look at the agreement, a new section will appear with the fields you have selected:

<table>
<thead>
<tr>
<th>Additional Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minutes Until Signed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minutes Until Signed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minutes Until Signed</td>
</tr>
</tbody>
</table>

ADD RELATED OBJECTS TO THE AGREEMENT PAGE

You may associate EchoSign 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.
• Go to Setup / Create / Objects

• Click on 'Agreement'

• Click 'New' on 'Custom Fields & Relationships'

• Select 'Lookup', Click 'Next'
• Choose ‘Quote’ from the drop-down list. Click ‘Next’

![Step 2. Choose the related object](image)

• Click ‘Next’ in steps 3, 4 and 5

• In Step 6, ensure that the ‘Add Related List’ check box is checked, then click ‘Save’.

![Step 6. Add custom related lists](image)
Adobe EchoSign 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.

SETUP INSTRUCTIONS FOR CHATTER STATUS UPDATES

1) After installation the EchoSign for Salesforce app, you can configure which Chatter updates you want your users to see. Go to Setup / Develop / Custom Settings / 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 need to go to Setup / Security Controls / Remote Site Settings to add a New Remote Site.

3) Copy the first part of your web page URL (e.g. https://abchostname.salesforce.com) with the Salesforce Org domain and enter it to the Remote Site URL field. This URL may vary across different Orgs so make sure to enter the one specific to your Org.
4) Click the ‘Save’ button.

5) Make sure also that Chatter feeds are enabled for the Agreement record. Go to Setup > Customize > Chatter > Feed Tracking > Agreement

6) Check the box ‘Enable Feed Tracking’

7) Now you should have Chatter 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 EchoSign Publisher action. The same EchoSign action is used in the Salesforce1 mobile app or mobile browser experience. Since sending from Chatter uses the same EchoSign action as Salesforce, you can reference the Salesforce1 setup instructions in the next section to set up the EchoSign action in the Chatter feed as shown here.
Mandy Tran

Agreement Name
Global/Corp Client Services Agreement - TransDigital Opportunity

Message
Here is the contract you can review and sign.
Account: TransDigital Account
Amount: $83459.00
Look forward to working with you.

Account
TransDigital Account

Opportunity
TransDigital Opportunity

Documents
Client Services Agreement.doc

Send View Full Form
EchoSign 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.

SETUP INSTRUCTIONS TO SEND AGREEMENTS FROM SALESFORCE1 MOBILE

You can enable Salesforce1 by going to Setup > Salesforce1 > Settings

To add the EchoSign Publisher Action to the Homepage on Salesforce1 and Chatter feed, go to:

a. Go to Setup > Create > Global Actions > Publisher Layouts (Edit)
b. Drag the EchoSign Action to the Publisher Actions section of the layout.
c. Click Save

2) To add the EchoSign Publisher Action to the Opportunity, Account, or Contact, go to:
   a. Go to the page layout for the respective Object: Opportunity, Account, or Contact
b. Drag the EchoSign Action for that Object to the Publisher Actions section of the layout.

c. Click Save

**USING AGREEMENT TEMPLATES WITH PUBLISHER SEND ACTION**

You can use Agreement Templates with the EchoSign 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 checking the box ‘Available for Publisher Actions’.

- If enabled, then when sending from the EchoSign publisher action from the specified Master Object (Opportunity, Account, or Contact), 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 EchoSign action or the
  primary set of actions from the Salesforce1 homepage.
- If you check ‘Auto Send’ for your agreement template, EchoSign will send the agreement immediately
  once you hit the Send button.
USING ECHOSIGN SEND ACTION FROM SALESFORCE1

If you have enabled the EchoSign 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 EchoSign icon to view the new agreement record.

Click on the EchoSign 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.
Adobe EchoSign for Salesforce v15 Installation and Customization Guide

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Adobe EchoSign for Salesforce v15 Installation and Customization Guide
From Salesforce1, you can also get in-person signatures by clicking 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.

**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.

EchoSign for Salesforce supports 4 signer identity verification methods:
- Knowledge Based Authentication – Answer questions to verify signer identity
- Web Identity Authentication – sign in with Facebook, LinkedIn, Google, etc. before signing
- Password to sign agreement
- Phone authentication (NEW!) – Note: That is requires that you turn on signer authentication for each signer via the custom setting called Enable Per Signer Identity Verification.

If you don’t want to apply signer 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

To take advantage of this functionality, make sure you have the EchoSign Custom Settings set for knowledge based authentication and web identity.

- **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.com have KBA enabled so you can use it in Salesforce.

- **Disable Web Identity** - 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.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 EchoSign account and those outside of your EchoSign 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 (NEW!)** - Enable this setting to allow each signer to have a different identity verification method. (e.g. password, phone, social identity, KBA)

- **Enable Phone Authentication (NEW!)** - 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.
WEB IDENTITY VERIFICATION

- Web identity verification requires signers and approvers to prove their identity by authenticating through a 3rd party Web service: Google, LinkedIn, Facebook, Microsoft Live, Yahoo!, Twitter
- 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 (NEW!)

- 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.

ECHOSIGN INTEGRATION WITH OTHER SALESFORCE APPS

EchoSign 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
APPENDIX

CONFIGURE SALESFORCE TO SEND LARGE DOCUMENTS FOR SIGNATURE

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

![Note]: Sending file transactions over 2.8MB 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 [EchoSign for Salesforce Professional Edition - Additional Installation Steps](#).

To enable sending large files over 2.8MB follow the instructions below. 2.8MB is the sum total of all files in a single transaction.

**CONFIGURE ECHOSIGN CALLBACK SITE AND CUSTOM SETTINGS TO SEND LARGE FILES**

1. You first need to set up a Site for EchoSign Callback so that agreement updates can be pushed to Salesforce in a timely manner.
2. Go to Setup / App Setup / Develop / Sites
3. Follow the Salesforce instructions if creating a Site for the first time. If you have not used Salesforce sites in your Salesforce org, you will be required to register a Force.com domain name that will be used for all you Salesforce sites in the account.
   a. **Note**: 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 EchoSign has for callback URLs.
4. Click the **New** button
5. Set the 'Site Label' value to: EchoSign Callback
6. Set the 'Site Name' value to: EchoSign_Callback
7. Set the 'Site Contact' value to a Salesforce user who will receive notifications about Sites. In most cases, this would be the account admin.
8. Set the 'Default Web Address' value to EchoSignCallback.
9. Set the 'Active' value to Checked.
10. Set the 'Active Site Home Page' value to EchoSignCallback

The fields should look like this:
11. Click 'Save' to continue.
12. Under Custom URLs, click on the View link.
13. Copy the value of the URL in your browser window. It should look something like

```
```

You will need it for the configuration below. However, if testing on Sandboxes, copy the http URL and not the https URL.

14. Now go to Setup / App Setup / Develop / Custom Settings
15. Click on the 'EchoSign Settings' link
16. Click on the 'Manage' Button
17. Click the New (above the 'Default Organization Level Value' label) to create default custom settings for all Users.
18. Set the 'Callback URL EchoSign to Salesforce Site' value to the value of the 'Secure Web Address' you copied from the site configuration above. Make sure the address prefix is 'https' and not 'http'. Click ‘Save’ to save the settings.

19. You also need to add the AgreementAttachmentService Apex class to the Site profile so it is visible. Go to Develop / Sites / EchoSign Callback / Public Access Settings / Enable Apex Class Access. Find the Available Apex Class called 'echosign_dev1.AgreementAttachmentService' and add it to the Enabled Apex Classes as shown below.

20. You also need to add check the Agreement object and field permissions. Go to Develop / Sites / EchoSign Callback / Public Access Settings /

21. Go to the Custom Object Permissions and make sure that for 'Agreements' you check all the boxes: Read, Create, Edit, Delete, View All, Modify All.
22. Go to the Field-Level Security and click on “View” for ‘Agreement’.

23. Make sure the Attachment Service Invocation Count as the checkbox ‘Visible’ checked.
24. Also, make sure the "Attachment Service Invocation Count" field is editable by relevant profiles. Go to Create / Agreement / Objects / Agreement / Attachment Service Invocation Count / Set Field-Level Security
25. (Optional) For additional security, you should add the IP ranges for public access settings in the Site so that it is restricted properly to EchoSign IPs. If that is not already set up, go to Develop / Sites / EchoSign Callback / Public Access Settings / Login IP Ranges.

Click the 'New' button and add both of these IP ranges:

a. 72.3.215.114 - 72.3.215.121
b. 166.78.79.112 - 166.78.79.127

When completed, the Login IP Ranges for the EchoSign Callback Site should be as follows:
ECHOSIGN GROUP MAPPINGS – MOVE USERS TO SPECIFIC ECHOSIGN GROUPS

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

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

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

MOVE USERS TO DIFFERENT ECHOSIGN GROUPS

Follow these steps to set up Group Mappings and move users to their respective EchoSign groups:
1. Create the mappings between a Salesforce profile to an EchoSign group. You can map multiple Salesforce profiles to a single EchoSign group.

2. Check the 'Sync Selection' box for any mapping row that you would like to Sync.

3. Click the 'Save' button to save the mappings or 'Cancel' to discard the changes.

4. To move any users to their respective EchoSign groups, click on 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.

6. Note that any Salesforce user in these profiles, who are not EchoSign users, will not be affected by this synchronization. Also, any new user created when using EchoSign 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. Go to Setup / Develop / Custom Settings / (Manage) EchoSign Settings. Click the 'Edit' button and check the box called 'Auto-Sync Group Mappings'. 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 EchoSign group based on the mappings saved and selected on the Group Mappings page.

![EchoSign Settings Edit](image)

If you don’t have this auto-sync setting turned on 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 EchoSign group based on the mappings saved and selected on the Group Mappings page.

To add this sync link on the User page layout, follow these instructions:

- Go to Setup / Customize / Users / Page Layouts and click the ‘Edit’ button.
- Click on Custom Links and drag the ‘Sync EchoSign User’ link from the top of the page to the ‘Custom Links’ section of the page. Click the ‘Save’ button.
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 on. To move users in bulk, use the EchoSign Group Mappings page to sync users.

**UPDATING SALESFORCE WITH AGREEMENTS SENT WITH THE ECHOSIGN API, WIDGETS, OR FROM ECHOSIGN.COM (PUSH AGREEMENTS)**

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

You can use [EchoSign's web services API](http://www.echosign.com) 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.com web application and have them all pushed back to Salesforce.

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

To enable this scenario, follow the following steps:

- If you have not configured the EchoSign Callback Site earlier, you will need to create a Salesforce Site to use this functionality (see instructions to [Configure Sites](http://www.echosign.com)).
- Next, add the ‘EchoSignAgreementPushCallback’ Visual Force page to the site. Go to Setup / Develop / Sites
- Click the Site name
• Under 'Site Visual Force Pages' click 'Edit'

• Select 'echosign_dev1.EchoSignAgreementPushCallback' and click 'Add'

• 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:
  o Copy the secure URL address from the EchoSign Callback Site you created and append '/echosign_dev1__EchoSignAgreementPushCallback' to compose the callback URL. Contact EchoSign Support (echosign@support.com) and provide them with your callback URL to set as your EchoSign 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'
  o EchoSign 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:
  o 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.
  o For example: If your site address is 'https://echov11-developer-edition.na12.force.com/EchoSignCallback',
the URL you should use in the EchoSign 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 EchoSign. For any issues, contact Adobe EchoSign 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 EchoSign 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.) Make sure the EchoSign API key for your account is set in Salesforce via the EchoSign Admin tab.
- Also, you can enable the 'Send to EchoSign' button to automatically send agreements using a predefined Agreement Template without requiring user to view the agreement page first. This is achieved by checking the box 'Auto Send' on the Agreement Template. Go to the Agreement Templates section of this customization guide for more information.

**INSTRUCTIONS TO ENABLE ‘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. Follow the steps below to ensure that this is set up properly.

1. The ability to send on behalf of another user works only on EchoSign for Salesforce v11.7 or later.
2. 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.
3. The EchoSign API key for the EchoSign account needs to be set in Salesforce on the EchoSign Admin page. 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.
4. In EchoSign Settings, make sure the 'Allow Sending on Behalf of Others' of checkbox is checked. To set this up, go to Setup / Develop / Custom Settings / EchoSign Settings / 'Edit'.
5. In the User record layout, add the field ‘EchoSign – Allow Sending as Other Users’ by dragging it to the
6. For the specific user that you want to send on behalf of, you need to check the box on his or her User record called 'EchoSign – Allow Sending as Other Users'.

7. In the Agreement page layout, add the field call 'Send On Behalf Of' by going to Setup / Create / Objects / Agreement / Field Sets (BETA) / 'Edit'. Drag the field into the Field Set.

8. 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 EchoSign 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.

- **Remind**: Make sure you have an agreement with status Out for Signature in your account.

- **Delete**: Make sure you have an agreement with status Out for Signature in your account.

- **Cancel**: Make sure you have an agreement with status Out for Signature in your account.

- **Update**: Make sure you have an agreement with status Out for Signature in your account.

- **View**: Make sure you have an agreement with status Draft, Out for Signature, Signed, or Cancelled in your account.

REQUIRE USERS TO SIGN-ON TO SALESFORCE TO ACCESS ECHOSIGN ACCOUNT

Through SAML (Security Assertion Markup Language) settings, EchoSign can be integrated with Salesforce.com so that your users are required to log in to Salesforce.com to gain access to their EchoSign 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 EchoSign account.

To do so, Salesforce will need to be configured as a SAML provider and EchoSign will need to be configured to use SAML so that only valid Salesforce.com users can log in to an EchoSign account. The simple setup instructions can be found in the *EchoSign guide for setting up SAML*.
GRANTING ACCESS TO ADDITIONAL PROFILES

During installation, you may have only granted Administrators access to EchoSign for Salesforce. If you need to extend access to additional user profiles, please refer the documentation for Granting Profile Access for EchoSign 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 EchoSign for your Salesforce Org, remember to update it so that status updates continue to work properly for agreements in your Org. Go to the EchoSign Admin page and click on the Account Setup tab. Then select the link: ‘Update Salesforce User Name or Password to Enable Automatic Status Updates’.

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 EchoSign. The only way to do that is for the admin or the user to log into EchoSign.com to update the password. You can reference this guide for instructions on how to update your email address.

ECHOSIGN 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 files over 2.8MB is not be supported in the Professional edition.

ADDING FIELDS TO THE AGREEMENTS PAGE LAYOUT

- Go to Setup / Create / Objects
• Click on 'Agreement'

• In the Page Layouts section, click 'Edit' next to the Agreement Layout Professional

• Drag and drop the following fields into the page layout
  o Recipient (User)
  o Additional Recipient 1 (User)
  o Additional Recipient 2 (User)
  o Additional Recipient 3 (User)
  o Enable Automatic Reminders
  o Recipient Addresses
  o Merge

• Click ‘Save’
• Go to Setup / Create / Objects
• Click on 'EchoSign Recipient'
• In the Page Layouts section, click 'Edit' next to the EchoSign Recipient Layout Professional
• Drag and drop the following fields into the page layout
  o Agreement
  o Contact
  o Email Address
  o Lead
  o Order Number
  o Person Account
  o Recipient Type
  o useEmailAddress
  o User
  o Merge
• Click 'Save'

SELECT ECHOSIGN AGREEMENTS PAGE STYLE (ADVANCED OR BASIC)

EchoSign 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 layout as well as instructions for how to change to the Basic page layout.

THE 'ECHOSIGN AGREEMENT ADVANCED' PAGE STYLE (DEFAULT)

This page which is set as the default style allows you to create an EchoSign 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 'ECHOSIGN 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 EchoSign Agreement Basic page instead of the default Advanced page, follow the instructions in the next sections:

1. Setting the 'EchoSign Agreement Basic' page layout
2. Setting up the Agreement buttons to work for your page layout

SETTING THE 'ECHOSIGN AGREEMENT BASIC' PAGE STYLE

If you choose to use the 'EchoSign 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.
Go to Setup / Create / Objects

Click on 'Agreement'

Click 'Page Layouts' and then 'Page Layout Assignment'

Click 'Edit Assignment', select all the profiles, select 'Agreement Layout Enterprise / Unlimited' from the drop down list and click 'Save'

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:

- Go to Setup / Create / Objects

- Click on ‘Agreement’

- Click ‘Standard Buttons and Links’

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**SETTING UP THE AGREEMENT BUTTONS FOR ‘ECHOSIGN AGREEMENT BASIC’ PAGE STYLE**

- Click ‘Edit’ next to the Button label ‘New’ and set it to ‘Standard Salesforce.com Page’

- Click ‘Edit’ next to the Button label ‘Edit’ and set it to ‘Standard Salesforce.com Page’
Click ‘Edit’ next to the Button label ‘View’, select the ‘Visualforce Page’ and select ‘EchoSign Agreement’ from the list.

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

**CUSTOMIZING THE ‘ECHOSIGN AGREEMENT BASIC’ PAGE LAYOUT**

This section addresses customizing the ‘EchoSign Agreement Basic’ page. These customizations are not available when using the default ‘EchoSign Agreement Advanced’ page. See **Select EchoSign Agreements Page Style** for more.

**CUSTOM ADDRESS FIELDS**

Once you add the required custom fields to your EchoSign 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, go to Setup / 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.

See EchoSign for Salesforce Custom Settings for instructions on how to update the 'Override Recipient Field List' settings.

**SEND USING THE 'ECHO SIGN 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
5. On the next screen, attach files from your computer or from the Salesforce Library or Salesforce Content.

6. Click the 'Send for Signature' button

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SWITCHING BACK TO THE 'ECHOSIGN AGREEMENT ADVANCED' PAGE LAYOUT

SETTING THE 'ECHOSIGN AGREEMENT ADVANCED' PAGE STYLE

If you choose to switch to the default 'EchoSign 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.

- Go to Setup / Create / Objects
  - Click on 'Agreement'
  - Click 'Page Layouts' and then 'Page Layout Assignment'
  - Click 'Edit Assignment', select all the profiles, select 'Agreement Layout Professional' from the drop down list and click 'Save'

SETTING UP THE AGREEMENT BUTTONS FOR THE 'ECHOSIGN AGREEMENT ADVANCED' PAGE STYLE
If you are switching back to the Advanced page layout, then follow these instructions for setting up the Agreement buttons:

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:

- **Go to Setup / Create / Objects**

  ![Objects](image)

- **Click on ‘Agreement’**

  ![Agreement](image)

- **Click ‘Standard Buttons and Links’**

  - Click ‘Edit’ next to the Button label ‘New’ and set it to ‘No Override (use default)’
  - Click ‘Edit’ next to the Button label ‘Edit’ and set it to ‘No Override (use default)’
  - Click ‘Edit’ next to the Button label ‘View’ and set it to ‘No Override (use default)’

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

  ![Buttons and Links](image)