Adobe Sign for Salesforce

Field Mapping and Templates
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Overview
Adobe Sign 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 Adobe Sign template library by storing Adobe Sign forms and templates in your Salesforce Documents tab.

Adobe Sign 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. (See Data Mappings)
- Merge data from Salesforce into document fields before sending for signature. (See Merge Mappings)

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

**Note:** You will notice some pages have a "Walk Me Through" button:

This button moves you through the high-level steps for which the page is designed. It’s not a sanity check of the values you are inserting, but it is useful for moving through a process in the right order, and not missing any required elements.

**Tip:** Relating document field names to SFDC object fields can be facilitated by "uploading" the document field names into Salesforce. This allows you to select field names from a picklist instead of freehand typing the field names into a text field. The way to do this is:

1. Create your form with all fields defined
2. Send the form for signature through Salesforce with an obvious agreement name like W4 Field Template
   a. This helps you find the right template when you are mapping your fields
3. Enter some (any) content into every field you intend to map, and sign the agreement so it registers as completed in Salesforce.
   a. The completion process gives Salesforce a source to pull the field names from
4. You should now see the template when you use the Import feature of data/merge mapping
A Quick Note on Forms/Text Tags

Successful mapping requires that you have pre-built forms with defined field names so you can logically relate the SFDC object field to the Adobe Sign form field.

A simple form is illustrated below. The fields are defined by the curly bracket pairs on either side (defining the width of the field) and the field name (the string of characters between the curly brackets).

```
First: {{firstname}}
Last:  {{lastname}}
Street: {{streetaddress}}
Apt:  {{apt}}
City:  {{city}}
State: {{state}}
Zip:   {{zipcode}}
```

Text tags can include additional arguments beyond the name value, including validations, calculations and regular expressions. An in-depth understanding of form building can be found here, and can dramatically improve the quality of data you capture during the signature process.

Tip: The Text Tag Shortening feature (pg. 27 of the text tag guide) can be very useful in form design and field mapping by establishing a convention for the field names that repeat on every document (and saves time by not having to re-create the formal tag). This expressly improves data mapping across multiple forms and builds an anchor for future forms.
Adobe Sign 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.

You can also use merge mappings to automatically add the product lists tied to an opportunity. You can set which product attributes (like quantity and price) are included in your agreements as well as specify how to sort and filter the associated products.

About 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 Adobe Sign Agreement. The target for each merge mapping item is a designated field on an Adobe Sign agreement.

For example, the mapping below updates the Adobe Sign document fields for "FirstName" and "LastName" with the Salesforce Recipient (Contact) field data. It also fills in the company field in the document with the name of the account.

Note: When you select an object to map, you are starting at the Agreement object, and going to a parent/lookup object. The association between the objects must already be established at runtime.
Creating a Merge Mapping

To create a new Merge Mapping:

1. Select Adobe Sign from the Force.com App menu at the upper-right of the screen
   2. Click the Merge Mappings tab
   3. In the Merge Mapping home page, click New.

The New Merge Mapping page displays.
4. In the Mapping Information section, 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 import and map form field names from an existing document, you can select an agreement that was sent for signature and signed. You can import fields from additional agreements to add additional fields. Fields with duplicate names will not be imported twice. To import form fields, do the following:

   a. Click the show toggle to display the Import Document Form Fields section.
b. Click the Search icon after the field where you see **Import Fields from**

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

d. Click the **Import Form Fields** button.

The number of fields imported will be displayed.

6. In the **Map Salesforce Object Fields to Document Fields** section, you can create a mapping from fields that can be referenced from the Adobe Sign Agreement object (including custom fields). You can also add mapping rules to merge data into Adobe Sign documents.

To create a merge field mapping row, do the following:

1. Click **Add Field Mapping** to add a new, blank row.
2. Define the mappings and mapping rules through the following selections:

- **Target Document Field**—If you have imported form fields, you can select these fields. Or you can input a specific field name.
- Click on the text input field and a selectable drop-down displaying the available and imported form field values.
- **Source Type**—Select either *Salesforce Object Field* or *Constant*.
- **Source Value**—Depending on the Source Type selected, you must specify the following:
  - If the Source Value is *Salesforce Object Field*, you must select a value. To do this, click the *Selected Object* link to display the *Object Selector* dialog where you can select the Salesforce source object field.
  - If the Source Value is *Constant*, you must type a value in the Source Value field.
- **Disable**—If checked, this mapping row will not execute
- **Actions**—Clicking this icon will delete
3. Repeat steps 1-2 to add more mapping rows.

In the Map Salesforce Product Line Item Fields to Adobe Document Fields section, you can add product lists tied to an opportunity.

To create a merge field mapping row, do the following:

1. Click **Add Field Mapping** to add a new, blank row.

2. Click **Selected Object** to display the **Object Selector** dialog.

3. In the **Object Selector** dialog, select a Salesforce source field, select Opportunity, Opportunity Product, then add the product attributes, such as quantity, price, and line description, that are included in your agreements. You can also specify the sort field and sort order.
4. Click **Done**.
5. Repeat steps 1-4 to add more mapping rows.

When you have completed your Merge Mapping template, click **Save**

**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 the 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 is executed if this field is left blank.

**Note:** It is recommended that sizable or complex deployments only use default mapping during initial trial/proof of concept. Explicitly relating templates should be the practice.
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File Attachments

There are Merge Mapping settings that define how file attachments are handled. By default, the original attached document (e.g., an NDA template) will be removed and the merged document will be attached to the agreement record once the agreement is sent.

- **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.

**Note:** These settings are global in scope, and will impact all merge mapping templates.

To change these settings:

1. Navigate to **Setup > Develop > Custom Settings**
2. Click the Label for **Adobe Sign Merge Mapping Settings**
3. Click the **Manage** button
4. Click the **New** button
5. Edit the settings as desired and click **Save**

Troubleshooting Merge Mappings

Salesforce fields have validation rules that may cause a mapping to fail. For example, if you map Salesforce email field to an Adobe Sign text field it may fail if the content of the field is not a valid email address.

If a mapping fails for some reason, the error message is logged in the ‘Merge Mapping Error’ (echosign_dev1__Merge_Mapping_Error__c) field on the Adobe Sign Agreement object, and an email is sent to the owner of the merge mapping indicating the error.

**Note:** It is also possible to create a report or list view to expose failed mapping fields

The email notification is enabled by default, but can be turned off by adjusting the setting:

1. Navigate to **Setup > Build > Develop > Customize Settings**
2. Click the label **Adobe Sign Settings**
3. Click the Manage button on the Custom Setting Definition page
4. Click New or Edit on the Custom Setting page
5. Find the Enable Mapping Error Notification and alter as needed
Data Mappings – Push Signer Data & Files to Salesforce Records

Adobe Sign form field data mappings let you define how Adobe Sign 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 Adobe Sign signed agreement, audit trail, and any uploaded supporting documents from recipients into Salesforce objects by setting up file mappings.

About Form Field Data Mappings

Adobe Sign Data Mappings update Salesforce objects when an Adobe Sign 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 Adobe Sign form field, a specific constant value or a value from an Adobe Sign Agreement Field. The target for each data mapping item may be any field in any Salesforce object that can be referenced from the Adobe Sign 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, 4) changing Opportunity Stage when the contract is signed, and 5) adding the signed PDF and audit trail to the Contact.
Creating a Form Field Data Mapping

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

1. Select Adobe Sign from the Force.com App menu at the upper-right of the screen.
2. Click the Data Mappings tab.
3. In the Data Mappings home page, click the New button.
4. In the New Data Mapping page, type an intuitive 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. You can assign it to an Agreement Template that will be used when an agreement is created.

5. Use the Fields Mapping section to define data mappings to Salesforce fields. You can add mapping rules to update fields to any related Salesforce object. You can create a mapping to any field (including custom fields). There are two ways to create mapping rows and specify which agreement fields the data is coming from. You can import fields from an existing document using Import Fields from an Existing Agreement. Or, you can define each mapping row individually using Add Mapping.

   1. You can use Import Fields from an Existing Agreement to import a list of form field names from which to create mappings by selecting an existing agreement that was sent for signature and signed. You can import fields from additional agreements to add additional fields. To import fields from an agreement, do the following:

      Note: If you do not have any custom Adobe Sign fields in the document you are importing from, you will not be able to import the standard default Adobe Sign fields that come with each signed agreement. (e.g., signed (date), email, first, last, title, and company).

      i. Select the agreement you would like to import fields from.
ii. Click the **Import Form Fields** button. The number of fields imported displays.
2. You can use **Add Mapping** to add mapping rows individually as shown below:

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** — Select one of the following options: *EchoSign Form Field*, *Constant*, or *Agreement Field*.

2b) **What is the Value of the Data?** — Depending on *Data Coming From* option selected, you must specify the following:

   - *Data Coming From '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.
   - *Data Coming From '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.
   - *Data Coming From 'Agreement Field'* — Select an Agreement Field from the drop-down.

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

   - Signed/Approved
   - Waiting for Counter-Signature/Approval
   - Out for Signature/Approval
   - Canceled / Declined
   - Expired
6. You can optionally modify the settings for any mapping row.
   
   1. Under Actions, click the Settings icon ( ).

   2. In the Field Mapping Value Settings dialog, you can specify the following:
      
      - **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 Adobe Sign agreement is empty, do not write the empty value into the target Salesforce field using this mapping rule.

You can also optionally disable a mapping row so that it will not execute. To do this, click Disable.

### Creating a File Mapping

You can map the Adobe Sign signed agreement or audit trail to the selected target Salesforce object where they will be viewable in the Notes & Attachments section. To enable this option:

1. Click **Add Mapping** in the File Mapping table.
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2. For each File Mapping row, select:

1) **Which Salesforce Object to Update?**—Select the target Salesforce object where the data will be copied

2a) **How Do You Want to Add the File?**—The options are as follows:
   
   - **Add a reference link to the file**—Provides the URL to get the signed agreement PDF.
   - **Attach file directly to object**—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?**—Only required if you select **Add a reference link to the file**. You must select the target field to which the URL will be copied.

   **Note:** Adding a reference link for the audit trail, supporting document or split signed PDFs is not supported. You can attach these PDF files 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?**—The options are as follows:
   
   - **Signed Agreement – Merged PDF**—Select this option 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**—Select this option 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**—Select this option to push the audit trail in PDF format back to the Salesforce object record.
   
   - **Supporting Documents**—Select this option to push back any supporting documents that are uploaded by the signers back to the Salesforce object record.

   **Note:** If you have a custom URL in Adobe Sign 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.
1. Navigate to Setup > Administer > Security Controls > Remote Site Settings
2. Click the New Remote Site button
3. Add your Adobe Sign 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 a specified status. The options are as follows:
   - Signed/Approved
   - Waiting for Counter-Signature/Approval
   - Out for Signature/Approval
   - Canceled / Decline
   - Expired

3. Click Save to save the mapping.

Using Default and Multiple Data Mappings

You can 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 can 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 can 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) check box. 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. See Agreement Templates for more information.

Troubleshooting Data Mappings

Salesforce fields have validation rules that may cause a mapping to fail. For example, if you map an Adobe Sign text field to a Salesforce email field validation may fail if the content of the field is not a valid email address.

Make sure to use Adobe Sign form field validation rules where possible to ensure data entered by signers can be pushed into Salesforce. Adobe Sign standard PDF form fields validation rules from PDF documents and allows you to create validation rules when using Adobe Sign text tags. See the Text Tag Documentation 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 Adobe Sign Agreement object, and an email is sent to the owner of the data mapping indicating the error.

Note: It is also possible to create a report or list view to expose failed mapping fields

The email notification is enabled by default, but can be turned off by adjusting the setting:

Navigate to Setup > Build > Develop > Custom Settings

1. Click the Adobe Sign Settings label
2. Click Manage
3. Click New (or Edit)
4. Find (ctrl/cmd +f) the Enable Mapping Error Notification setting
5. Edit the setting as desired
6. Click Save
Agreement Templates and the Send for Signature Button

Adobe Sign Agreement Templates offer an easy way to set up many default values and settings for your agreements ahead of time. You can also link an agreement template to a ‘Send for Signature’ button.

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 (e.g., Opportunity, Account, Contact, Lead, Opportunity, Contract) to the agreement template. Additionally, you can preset the recipient definitions, map fields to agreement fields, and pre-define the file attachments.

You can also set up a ‘Send for Signature’ 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

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

1. Select Adobe Sign from the Force.com App menu at the upper-right of the screen
2. Click the Agreement Templates tab
3. In the Agreement Templates home page, click the New button
The New Agreement Template page displays:

4. In the **Information** section, enter or enable the following:

   o **Agreement Template Name**—Enter a name for the agreement template.
   
   o **Master Object Type**—Enter the API name (not the label) 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 to look up fields and map in the Master Object or data from lookup objects. Examples of a Master Object include *Opportunity*, *Account*, *Contact*, *Lead*, *Opportunity*, or *Contract*. If you have a Master Object defined in the Agreement Template, you should
initiate the agreement from a 'Send for Signature' button on the Master Object. See [Enabling the Send for Signature Button](#) for more information about how to enable a default button or create new 'Send for Signature' buttons.

- **Active**—Enable this option to make the template available for use. Unchecking this option will remove the template from use.

- **Default**—Enable this option 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 for Signature' button for the Account object that is associated with a specific agreement template. See [Enabling the Send for Signature Button](#) for more information about custom buttons.

- **Auto Send**—Enable this option 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 clicks the 'Send for Signature' button from a Salesforce record. For 'Auto Send' to work, you must 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 Chatter Publisher Action allow users to send agreements from Chatter. Check this box to enable this agreement template for the 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 [Adobe Sign Chatter Publisher Action](#).

5. In the **Agreement Information** section, enter or select the following:

<table>
<thead>
<tr>
<th>Agreement Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Agreement Name</strong></td>
</tr>
<tr>
<td><strong>Message</strong></td>
</tr>
<tr>
<td><strong>Signature Type</strong></td>
</tr>
<tr>
<td><strong>Language</strong></td>
</tr>
</tbody>
</table>

- **Agreement Name**—Enter a custom name or accept the default.

- **Message (Optional)**—Enter a custom message.

- **Signature Type**—Select a signature type and recipient language. The options are as follows: None, e-Signature, or Written Signature.

- **Language**—Select the language for the send email.
Note: In the text fields, such as Agreement Name and Message, of an Agreement Template, 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. See the examples below.

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:

<table>
<thead>
<tr>
<th>Agreement Name</th>
<th>Acme Corp Quote Agreement – Customer Opp – Acme EchoCorp</th>
</tr>
</thead>
</table>
| Message        | Here is the quote for: Account: Company XYZ
|                | Amount: 1620000.00
|                | Please sign the attached agreement.                    |
| Language       | English (United States)                                |
| Signature Type | e-Signature                                            |

Example 2: Custom Object as Master Object
Custom Lookup Field on the Opportunity: Student__c
Agreement Template Definition: 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}
6. In the Agreement Options section, enter, select, or enable the following:

   ![Agreement Options](image)

   - **Email Copy To**—Enter the comma separated email addresses to whom the agreement should be sent.
     
     **Note:** In 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 field 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.

   - **Automatic Reminders**—Select an option for automatic reminders. The options are Never, Every Day, Until Signed; or Every Week, Until Signed.

   - **Signature Flow**—Select an option for the signing order. The options are None, Recipients sign in order or Recipients sign in any order.

   - **Sender Signature Order**—Select an option for when the sender should sign. The options are None; Recipients sign first, then sender signs; or Sender sign first, then recipients signs.

   - **Send On Behalf Of**—The agreement will be sent behalf of the user record ID specified by this field.
     
     **Note:** If you are using the 'Send on Behalf of' functionality, make sure to enable it first by following these instructions.

   - **Post Sign Redirect URL**—To automatically redirect the signers of an agreement to a specified URL after they sign, enter a URL. The Enable Post Sign Options setting must be enabled to use this option.

   - **Enable Hosted Signing**—Enable to facilitate hosted, in-person signing if the signer is available.
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- **Sender Signs Only**—Enable this option to add the "Only I Sign" functionality to the template. The **Enable Sender Signs Only** setting must be enabled to use this option. Depending on your requirements, this option can be set to read only using the **Read Only Sender Signs Only** setting.

- **Enable Preview and Position Fields**—Enable this option to allow you to preview the agreement and to drag-and-drop form fields on to it before sending it out for signature.

- **Use Fax Number**—Enable to send an agreement to the fax number of a contact, lead, or user when a written signature is preferred.

- **Days Until Expiration**—Enter the number of days until the agreement expires.
  
  **Note:** The number of days entered is added to the current date when the agreement record is generated from the agreement template to dynamically calculate the expiration date.

- **Post Sign Redirect Delay (seconds)**—If the Enable Post Sign Options setting is enabled and a Post Sign Redirect URL is specified (see below), enter the number of seconds that should elapse before executing the redirect.

7. In the **Agreement Security Options** section, enter, select, or enable the following:

- **External and Internal Signer Verification Method (Optional)**—Select a verification method for Internal Signers (all email addresses within your Adobe Sign account) and External Signers (all email addresses **not** within your Adobe Sign account). The options are None, Password to sign agreement, Knowledge based authentication, or 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.

- **Sign External Password**—Set the password value to sign the agreement for external recipients when **External Signer Verification Method** is set to **Password**

- **Sign Internal Password**—Set the password value to sign the agreement for internal recipients when **Internal Signer Verification Method** is set to **Password**

- **Password protect the signed document (Optional)**—Enable this option to encrypt the signed PDF that is sent to signers.

- **View and Confirm Password**—Enter the password that will be required to open the PDF of the signed agreement.
8. In the *Mapping Settings* section, you can optionally specify which data mapping or merge mapping or both to automatically run when sending agreements using this agreement template.

   - **Data Mapping**—Select a data mapping to be used to map inputs from a signed agreement back into Salesforce.
   - **Merge Mapping**—Select a data mapping to merge Salesforce fields into an agreement before sending it.

9. In the *Referenced Objects* section, you can 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.

10. Click **Save** to save the template and display the Agreement Template page.
Adding Recipients, Attachments, and Form Field Templates to Agreement Templates

In the Agreement Template page, you can further customize your agreement template by specifying recipients, attachments, and form field templates.

Adding Recipients

To add recipients to an Agreement Template, do the following:

1. Click the name of the template to open it for editing
2. In the Add Recipient section, click the New Add Recipient button.

The Add a New Recipient page displays.
3. In “Step 1: Select Recipient Type and Role”, select the following:

- **Source of Recipient**—From the drop-down, select one of the following options for specifying the recipient:
  - Predefine the Recipient
  - Look Up Based on Master Object Field
  - Runtime variable

If the Master Object selected is Account or Opportunity, you can also select the following:

- `<Account or Opportunity>` Primary Contact Role
- `<Account or Opportunity>` Contact Role
- All `<Account or Opportunity>` Contact Roles

**Note:** If you select *Opportunity Primary Contact Role* or *Account Primary Contact Role*, 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. (See
Creating an Agreement Template for more information.) Step 2, Specify the Recipient (see below) is not required if the Primary Contact Role is selected.

- **Recipient Type**—From the drop-down, select one of the following options: Contact, Lead, User, or Email.
- **Recipient Role**—From the drop-down, select one of the following options: Signer or Approver.
- **Signer Verification Method**—From the drop-down, select one of the following options: None, Email, Password, Social, KBA, or Phone.
  
  **Note:** Make sure your Adobe Sign account is enabled for these signer verification methods in order to use them in Salesforce.
- **Recipient Message**—Enter a private message for this recipient as needed
- **Index**—This number indicates the signature position for the recipient. This index is critical in regards to forms that have multiple signers, or parallel/hybrid workflows, and specifically designated fields.

4. Click the **Next** to proceed to the next step.

5. In "Step 2: Specify the Recipient", do the following:

   - If you selected **Predefine the Recipient** in Step 3, select a recipient in the **Recipient - *<Recipient Type>*** field.
• If you selected *Look Up Based on Master Object Field* (Step 3 above), 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 this 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.

• 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 this 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* in Step 3, you can specify a Recipient ID in SFDC URL when specifying a recipient for the agreement template. To do this, you must specify the variable here (e.g., myRecipient).
Then in the 'Send for Signature’ 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 for Signature’ 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 the Variable Name blank.

6. Click Save to save your recipient, then repeat the above steps to add additional recipients.

The following shows three predefined recipients (a Contact, a User, and a Lead) added to the Agreement template.

---

**Adding Attachments**

To add Attachments to the Agreement Template, do the following:

1. Click the name of the template to open it for editing
2. Click the **New Add File Attachment** button.
   - The *Add a New File Attachment* page displays.
3. In "Step 1: Select File Attachment Type", select an Attachment Type from the drop-down.

   - Document from Content
   - Document from EchoSign Library
   - Document from Library (Salesforce library)
   - Document from Master Object
   - Runtime variable

   If the Master Object selected in Step 3 is *Opportunity* or *Quote*, you can also select the following:
   - Quote Document from Opportunity Quote or Quote Document from Master Quote (if Master Object is Quote)

4. Click the **Next** to proceed to the "Step 2: Specify the File Attachment".
   - If you selected *Document from EchoSign Cloud Library* in Step 3, then simply select from the Adobe Sign document templates in the next step.
• If you selected *Document from Library* in Step 3, then select from the Salesforce documents in the next step.

![Add File Attachments](image1)

*Add a New File Attachment*

<table>
<thead>
<tr>
<th>Document Name</th>
<th>File Extension</th>
<th>Author ID</th>
<th>Body Length</th>
<th>Internal Use Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agreement Logo</td>
<td>PNG</td>
<td>Casey Jones</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Adobe Document Cloud Logo</td>
<td>PNG</td>
<td>Casey Jones</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Merge Mapping Logo</td>
<td>PNG</td>
<td>Casey Jones</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

• If you selected *Document from Content* in Step 3, then select from the Salesforce Content or Files documents in the next step.

![Add File Attachments](image2)

*Add a New File Attachment*

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Adobe Sign for Salesforce *Field Mapping and Templates*
Adobe Sign for Salesforce Field Mapping and Templates

If you selected Document from Master Object in Step 3, 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.

You must specify the criteria to be used to determine which file attachment is used:

- **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
- **Selection Determined By:**
  - Last Modified Date
• Created Date

• If you selected Runtime variable in Step 3, you can specify an Attachment ID on the Master object and Recipient ID in the SFDC URL when specifying an attachment for the agreement template. You will need to specify the variable here (e.g., myRecipient or myAttachment).

Then in the ‘Send for Signature’ 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 for Signature’ buttons.

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

5. Click Save to save your attachment, then repeat the above steps to add additional recipients.

Adding Form Field Templates

To add a form field template to your agreement template:

1. Click the name of the template to open it for editing

2. Click the New Add Form Field Template button

   • The Add a New File Attachment page displays.

   Note: Form field templates can be created in Adobe Sign 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.
In the *Add a New Field Template* page, select the template to be used.

**Note:** Currently only one form field template can be selected per transaction but it 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.

- Click **Save** to save your form field template selection.

### Mapping Data into Agreement Fields

To map data into agreement fields in the Agreement Template, do the following:

1. Click the name of the template to open it for editing.
2. Click the **New Map Data into Agreement Fields** button.
   - The *Add a New Field Mapping* page displays.

3. In "Step 1: Select the Field Mapping Method" of the Add a New Field Mapping page, select one of the following mapping methods:
   - Input Specific Value
   - Select Master Object Field
4. Click **Next** to Continue.

5. In "Step 2: Specify the Field Value and Target Field of Add a New Field Mapping", do one of the following:
   - If you selected *Input Specific Value* as the mapping method in Step 3, enter a *Target Field Value* and select a *Target Agreement Field* that data will be mapped into when the agreement is generated.
   - If you selected *Select Master Object* as the mapping method in Step 3, 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, if the Master Object 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.

6. Click **Save** to save your field mapping.
Enabling the Send for Signature Button

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

Here is an example of how to enable the 'Send for Signature' button for the Opportunity object:

1. Navigate to Setup > Build > Customize > Opportunities > Page Layouts
2. Click the Edit Action for the Opportunity Layout.
3. With Buttons highlighted, click and drag the 'Send for Signature' object from the top section to the 'Custom Buttons' box in the Opportunity Detail section.
Creating Custom ‘Send for Signature’ Buttons

You can create custom ‘Send for Signature’ buttons for other objects. You can label the button to meet your needs.

Here is an example of how to create a custom ‘Send for Signature’ button for the Opportunity object:

1. Navigate to Setup > Build > Customize > {Object} > Buttons, Links, and Actions
   - {Object} is Accounts, Contacts, Leads, or Contracts

   In the Buttons, Links, and Actions page, click the New Button or Link button.
   - The Custom Button or Link Edit page displays.

2. 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:
     If you want to associate a specific Agreement Template for a specific ‘Send for Signature’ button, then the button path should be:
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 the button is clicked and the agreement is generated, send the user to a different page than the agreement page using retURL parameter. Example: You can define a 'Send for Signature' 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 for Signature' 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, see [onLoadActions](#). Alternatively, you can map the 'Send' value to the 'On Load Action (Picklist)' field on the Agreement record. See [Map Data to Agreement Fields](#) for information on how to define this mapping.

3. Click the **Save** button.

   After creating the custom button, go to the Page Layout for that object and add it to the page similar to the steps mentioned above for the Opportunity example. (See [Enabling the 'Send for Signature' Button](#) for more information.)
Enable Post Sign Options

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

To enable post sign options:

1. Navigate to Setup > Build > Develop > Custom Settings
2. Click the Adobe Sign Settings label
3. Click Manage
4. Click New (or Edit)
5. Find the setting Enable Post Sign Option
6. (Optional) Find the setting for Read Only Post Sign Options
7. Edit as needed, and click Save

Enable Sender Signs Only

Enable this setting to display and enable the ‘Sender Signs Only’ option in the Recipients section of the send agreement page. When the ‘Sender Signs Only’ option is used, the agreement or document is presented to the sender to sign. This functionality is similar to the ‘Only I Sign’ functionality in Adobe services. This option can be set to read only using the Read Only Sender Signs Only setting.

To enable the Sender signs only feature:

1. Navigate to Setup > Build > Develop > Custom Settings
2. Click the Adobe Sign Settings label
3. Click Manage
4. Click New (or Edit)
5. Find the setting Enable Sender Signs Only
6. (Optional) Find the setting for Read Only Sender Signs Only
7. Edit as needed, and click Save
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. 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. 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.

Note: The ability to send on behalf of another user works only on Adobe Sign for Salesforce v11.7 or later.

To enable the “Send on the Behalf of” functionality:

1. Enable the ‘Allow Sending on Behalf of Others’ setting by doing the following:
   a) Navigate to Setup > Build > Develop > Custom Settings then
   b) Click the Adobe Sign Settings label.
   c) Click the Manage button.
   d) Click the New (or Edit) button.
   e) Find (ctrl/cmd +f) the Allow Sending On Behalf of Others setting and edit it as needed
   f) Click the Save button

2. Add the ‘DC – Allow Sending as Other Users’ field to the User record layout by doing the following:
   a) Navigate to Setup > Build > Customize > Users > Page Layouts.
b) Click the **Edit** Action next to User Layout.

c) With **Fields** selected, click **Adobe Sign Allow Sending As Other Users** and drag it to the "Additional Information (Header visible on edit only)" section of the layout.

d) Click the **Save** button

3. For the specific user that you want to send on behalf of, you must enable ‘**Adobe Sign Allow Sending as Other Users**’ option as follows:

   a) Navigate to **Setup > Administer > Manager Users > Users**

   b) Click the **Edit** Action for the specific user.

   c) In the **User Edit** page, Additional Information section, enable the **Adobe Sign Allow Sending as Other Users** option.

   d) Click the **Save** button
4. Add the ‘Send On Behalf Of Others’ field to the Agreement page layout by doing the following:
   a) Navigate to Setup > Build > Create > Objects.
   b) Click the Agreement link.
   c) Click Field Sets at the top of the page to navigate to that section.
   d) Click the Edit Action.
e) With **Agreement** selected, locate the **Send On Behalf Of** field then click and drag it to the **In the Field Set** section.

f) 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 Adobe Sign for the Agreement button actions: Send, Remind, Delete, Cancel, Update, and View. The URL parameter will respect the Toolbar Settings (see the Advanced Customization Guide) 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.
  
  https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=send

- **Remind**: Make sure you have an agreement with status Out for Signature in your account.
  
  https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=remind

- **Delete**: Make sure you have an agreement with status Out for Signature in your account.
  
  https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=delete

- **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 Canceled in your account.
  
  https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=view