
Adobe Sign

Creating Custom Email Templates Reference Guide

Overview

There are currently four templates that are customizable currently with Adobe Sign. With CEMT, you would be able to revamp the standard email to match your company's brand with your own familiar branding, color scheme, images, and text. You can format the look and feel for these templates however you like, for the four emails below:

- Please Sign
- Signed and Filed
- Reminder
- Canceled

Basic guidelines

The custom HTML for your email templates created by your team must be sent over to your CSM and Professional Services contact. The custom HTML you provide should include specific CSS that targets the email clients you want to build these templates for (Microsoft Outlook, Gmail, Apple). Your PS contact will be implementing the Adobe Sign variables that are used for the emails and testing the templates across multiple email clients. Once the HTML is received, please allow at least 3 business days for the Adobe team to revise and verify the HTML is functioning correctly. Adobe will then test the template with the Adobe Sign variables and push it live to a test group in your Enterprise account for your team to confirm it is working properly, and then publish it live account-wide or to the specific groups requested.

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When creating your HTML, we recommend using table based layouts to ensure the look and feel of the template is consistent across the multitude of email clients that are being used today. The custom email templates can only render HTML and CSS, so any scripting languages must not be used when creating the HTML. For more info on using table based layouts for email templates, please refer to the link [here](#).

All optional components can be changed or removed from your custom template, and we ask that you put a placeholder for the required components to ensure the email works as intended with the syntax <PLACEHOLDER>. Your PS contact will review these with you while you work on creating the custom template.

- Ex. Agreement message: <AGREEMENT_MESSAGE>

Common variables used in all templates

- Agreement name (indicates title of the agreement with capital casing ex. "My Agreement")
- From title (indicates title of from address ex. if from address is from mr xyz, its value would be mr xyz)
- Last participant name and email (indicates full name and email of the last or most recent participant)
- Originator name or email (indicates full name, or email if the name is not set, of the originator/sender)

Starting with your own HTML document

If you and your team decide to develop your own HTML template, there are a few guidelines listed below to make note of.

Localization

If you are localizing a template in any language other than English, you will need to provide the fully localized text you want to use and have it included in your custom template that is sent to your PS contact.

Guiding principle

As a general guiding principle when developing the HTML template, use the more common constructs. HTML and CSS have a plethora of esoteric constructs that are completely valid, but the same result can be accomplished with any number of more common constructs, possibly at the cost of a few more lines of code. Using the more common construct improves the likeliness of a viable template within our system, and has the benefit of being better supported by a wider range of email clients.

Scripts

No scripts are permitted with Adobe Sign custom email templates at this time.

URL Guidelines

URL attributes, e.g. `img.src`, and `a.href`, must either begin with `http`, `https`, or a context variable passed in as an argument to the rendering.

Ownership of the URL domains must be confirmed.

Linking to locations that are not under the control of either the customer, or Adobe is not allowed. For example:

- Linking to the customer's local server is okay.
- Linking to the customer's social media pages okay.
- Linking to a shareware site, or an open account on Behance, is not permitted because neither the customer nor Adobe have control over the content on those sites.

CSS Guidelines

The CSS must be defined inline, not loaded from a URL.

CSS selectors must be class or ID based, not based in relative order or positioning.

The attributes of a CSS rule must be simple. Avoid using browser specific versions of attributes, they may not have the effect you expect in certain email clients.

CSS rules attributes must be simple values.

Rule attribute values that are URLs should follow the guidelines for URLs as attribute values above.

You may only use context variables in the URL attribute values as described in the guidelines for URLs as attribute values.

Please Sign

Adobe Sign ¹

3 J Smith Has Sent You **Test Agreement** to Sign

- 4 J Smith (Some Company) says:
Please review and sign this agreement
- 5 [Click here to review and sign Test Agreement.](#)
- 6 After you sign **Test Agreement**, all parties will receive a final PDF copy by email.
- If you need to delegate this document to an authorized party for signature, **please do not forward this email.** Instead, [click here to delegate.](#)
- 8

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PleaseSign commonly used variables

- Agreement Message (Component 4, indicates the text that was used as the agreement message in the send process)
- Esign link (Component 5, contains the link to access and sign the agreement)
- Expiration date (Component 8, tells expiration date to finish, will be null if there is no expiration date set)

These are the multiple components that make up the PleaseSign email. Each of these components can be updated or removed to achieve what you want.

- 1) Brand/Logo (optional)
- 2) Agreement Thumbnail (optional)
- 3) Sender has sent you Agreement to sign (optional, verbiage can be changed)
- 4) Agreement message (optional)
- 5) CTA (required, verbiage can be changed)
- 6) After you sign (optional, verbiage can be changed)
- 7) Delegate option (optional, verbiage can be changed)
- 8) Expiration notice (required if checked, verbiage can be changed)
- 9) Confidentiality notice (optional)
- 10) Echosign notice (optional)

Signed and Filed

Adobe Sign ¹

3 From: J Smith (Some Company)
To: jdoe@someothercompany.com

Test Agreement has been

4 Signed and Filed by
jsmith@somecompany.com and
jdoe@someothercompany.com!

5 Attached is a final copy of **Test Agreement**.

6 Copies have been automatically sent to all parties to the agreement.

7 You can view [the document](#) in your Adobe Sign account.

8 Why use Adobe Sign:

- Exchange, Sign, and File Any Document. In Seconds!
- Set-up Reminders. Instantly Share Copies with Others.
- See All of Your Documents, Anytime, Anywhere.

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To ensure that you continue receiving our emails, please add echosign@echosign.com to your address book or safe list. ¹⁰

These are the multiple components that make up the Signed and Filed email. Each of these components can be updated or removed to achieve what you want.

- 1) Brand/Logo (optional)
- 2) Agreement Thumbnail (optional)
- 3) From and To (optional, verbiage can be changed)
- 4) Agreement completed message (required, verbiage can be changed)
- 5) Attached message (optional, verbiage can be changed)
- 6) Copies message (optional, verbiage can be changed)
- 7) View document link (optional, verbiage can be changed)
- 8) Why use Adobe Sign (optional)
- 9) Confidentiality notice (optional)
- 10) Echosign notice (optional)

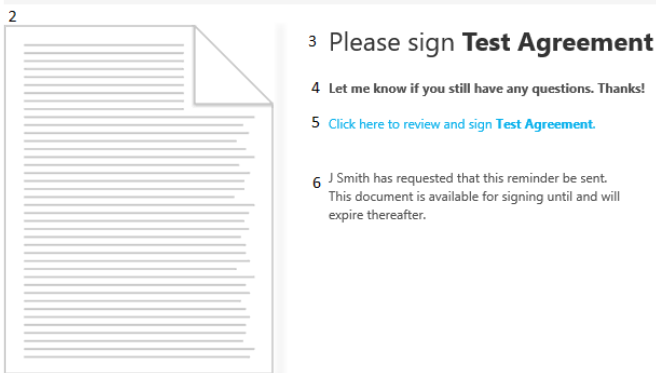
SignedAndFiled commonly used variables

- Agreement link (Component 7, link to view the completed agreement)

Reminder



Adobe Sign 1



These are the multiple components that make up the Reminder email. Each of these components can be updated or removed to achieve what you want.

- 1) Brand/Logo (optional)
- 2) Agreement Thumbnail (optional)
- 3) Reminder title (optional, verbiage can be changed)
- 4) Reminder message (optional)
- 5) CTA (required, verbiage can be changed)
- 6) Reminder request (optional, verbiage can be changed)
- 7) Confidentiality notice (optional)
- 8) Echosign notice (optional)

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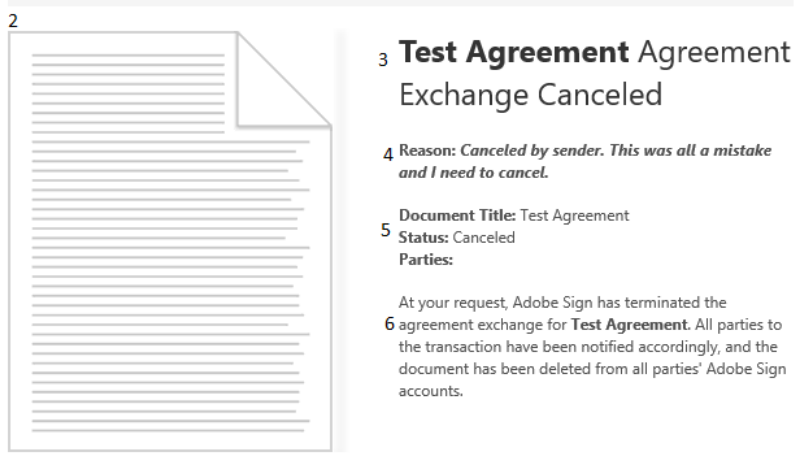
Reminder commonly used variables

- Agreement link (Component 5, link to view the agreement)
- Reminder note (Component 4, note added by the sender for the reminder)

Canceled



Adobe Sign 1



These are the multiple components that make up the Canceled email. Each of these components can be updated or removed to achieve what you want.

- 1) Logo/Brand (optional)
- 2) Thumbnail (optional)
- 3) Canceled Title (optional, verbiage can be changed)
- 4) Canceled reason (optional, verbiage can be changed)
- 5) Canceled bullets (optional, verbiage can be changed)
- 6) Canceled explanation (optional, verbiage can be changed)
- 7) Confidentiality Notice (optional)
- 8) Echosign notice (optional)

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Canceled commonly used variables

- Canceled note (Component 4, note by canceling party)
- Canceller full name and company (canceling party's name and company)

Frequently Asked Questions

Q: Can I build my own custom template in the Adobe Sign interface?

A: No. Currently there is no customer facing user interface for email templates. You can create your own HTML template, but it will need to be reviewed and installed by your Professional Services contact at Adobe.

Q: Are customizable templates available for Groups and users?

A: Customization is available at the account or group level. Adobe doesn't support customizable email templates for individual users. We also don't support email customization for specific recipients.

Q: Are customizable email templates available in all regions (NA1, NA2, EU1, JP1, AU1)?

A: Yes, customization is available for all regions with the May 2017 release.

Q: Are all Adobe Sign emails customizable?

A: No. We currently offer custom email templates for 4 of the standard emails: Please Sign, Signed and Filed, Reminder, and Canceled.

Q: Can email templates be created for multiple languages?

A: Yes, when you request a custom email template to be installed, you must identify the type (Please Sign) as well as the language the template is in. Customers must provide the translated text in their custom HTML template. Each type:language combination is considered a discrete template. (EG: **Please Sign:Spanish**)

Q: Do senders also get the customized email?

A: No. Senders receive the standard base email that is associated with Adobe Sign since their templates are based on a different template type.

Q: Is CEMT necessary if I only want to change the email header for all the email templates?

A: No, the logo can be updated in your account settings under Account -> Account Settings -> Email Settings

Q: How much do each of these custom templates cost?

A: The Please Sign and Signed and Filed are a package at \$2,000 (USD), and the Reminder and Canceled are \$500 (USD) each. If only one custom template is requested from the Please Sign and Signed and Filed, please contact your CSM.

Q: Can CEMT only be implemented on the whole account?

A: These templates exist as account wide templates, with groups inheriting their templates from the account, and users inheriting from the group. CEMT can be applied on a group basis, so all users in that group would inherit the group level template.

- Ex. The Adobe account does not have CEMT implemented, but the Adobe Sign group within the account has a Please Sign custom template implemented. Joe, a user in the Adobe Sign group, would be using the custom template when sending agreements out. All other groups within the Adobe account would continue using the standard email template.

Q: What if I want different templates for different groups?

A: That's achievable! If the HR group in your account wants a different vibe for their templates in comparison to the legal group, the HR group can design their templates accordingly. Please note, different templates would incur a separate charge.

Q: The custom email templates are not showing for CC'ed recipients or for senders, is there a different template needed?

A: No there is not a different template. Currently CEMT is only applicable for direct participants in the signing process. (Signers, approvers, delegates)

Q: What if I want images in my custom template? Can Adobe add images for me?

A: Images are definitely an important component to get your message across in an email, and Adobe Sign supports images in the custom templates. However, images must be hosted externally by your team or company, Adobe will not host any images.

Q: Why are tables needed for the HTML? Can't we write the HTML however way we want?

A: In order to have the HTML consistent across multiple email clients, table based layouts are recommended. It's also recommended to use the old-school attribute styling for tables, and to only use simple inline-styles. <style> tags are discarded by many email clients.

Q: Which email clients are supported for these custom templates?

A: CEMT is tested on the following email clients: Microsoft Outlook 2016/2019, Apple Mail 11/12, Gmail, AOL mail, and Yahoo! mail.