DocuSign for Apttus on Salesforce Spring 2019 Administrator Guide

02 April 2019

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About This Guide

With the DocuSign for Apttus Administrator Guide, you can find out how Apttus DocuSign for Apttus Adapter works and how to manage your organization's and your customers' eSignature workflows.

Topic	Description
What's Covered	DocuSign for Apttus Administrator Guide is designed to provide administrators with information on configuring and setting up DocuSign for Apttus.
Primary Audience	Apttus Administrator, Contract Manager, DocuSign Administrator
IT Environment	Refer to the latest DocuSign for Apttus on Salesforce Spring 2019 Release Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, refer to What's New topic.
Other Resources	• Contract Management User Guide: Refer to this guide to set-up the entire contract management process. • DocuSign for Apttus User Guide: Refer to this guide to set-up the entire DocuSign process. • X-Author User Guide: Refer to this guide for detailed instructions on setting up templates and editing agreement documents.

This guide describes the following tasks:

- Installing DocuSign
- Configuring Templates
- Configuring tags in DocuSign
- Adding custom fields to envelope

- Configuring signer groups

Before using DocuSign for Apttus, you must be familiar with the following:

- Basic Salesforce administration
- Salesforce and Apttus terms and definitions
- Apttus Contract Management administration

If you are new to DocuSign for Apttus, begin here: About DocuSign for Apttus Adapter and Overview .

What's New

The following table lists changes in the documentation to support each release.

Document	Topic	Description
Spring 2019	System Properties	Modified topic. Updated the **RetrieveAsCombinedDocument** System Property.
Winter 2018	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Summer 2018	System Properties	Added more information about the system property, Profiles Enabled for Finalize.

About DocuSign for Apttus Adapter

The DocuSign for Apttus adapter enables customers to electronically sign any type of document associated with Apttus quotes or contracts. By integrating Apttus with DocuSign, customers can streamline the Quote-to-Cash process, improve responsiveness, and eliminate errors. The adapter allows users to obtain electronic signatures for documents associated with quotes or contracts and automatically update the status - all inside Salesforce.

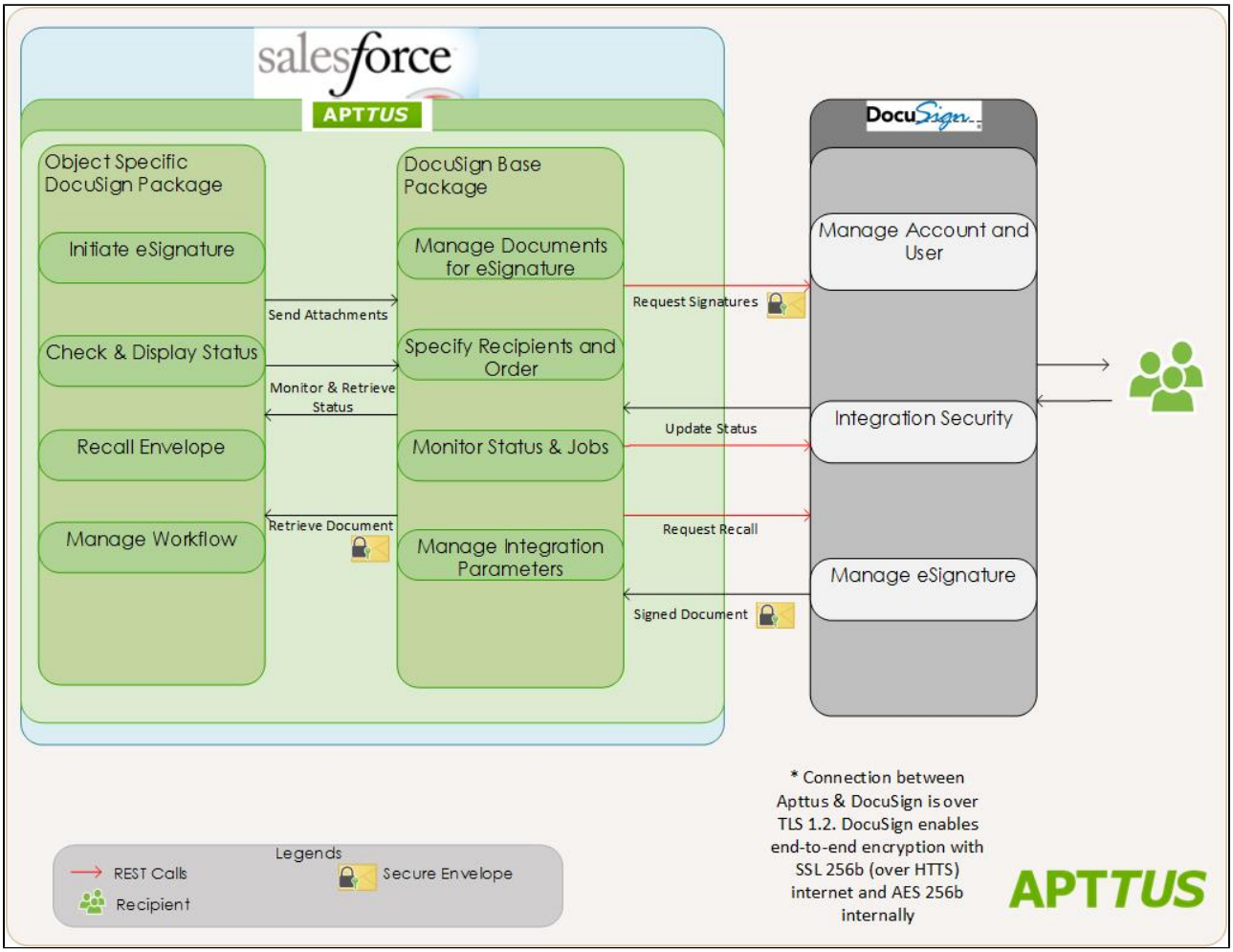
When it's time to obtain final approvals for a quote or contract in Apttus, the Apttus Adapter provides a streamlined point-and-click way for users to send attachments for electronic signature. Within the Apttus quote or contract, the Send for eSignature feature allows users to dramatically shorten approval cycles by quickly compiling the necessary documents, selecting the right contacts from their Salesforce instance and easily sending personalized emails. As documents are routed, the Apttus Adapter ensures that documents adhere to the appropriate workflows defined in Apttus. When legal documents are approved via DocuSign, the signature status is automatically updated inside Salesforce, and final signed documents are automatically attached to the Apttus quote or contract. With the Apttus Adapter, you have a fully secure, auditable and trackable view of who has approved your documents for Apttus quotes or contracts.

The Apttus Adapter is part of the Apttus Quote-to-Cash suite, which provides comprehensive capabilities for Configure Price Quote (CPQ), contract management and revenue management. Apttus solutions are built on the Salesforce platform, which means that all pricing, contracts, products, and deals are managed in the world's most scalable, robust and secure cloud platform - all inside Salesforce.

Overview

The Apttus DocuSign integration allows you to send documents from Agreement and Quote /Proposal for eSignature by DocuSign, all from within Apttus.

The standard Apttus objects and workflows are used along with Apttus DocuSign integration packages, which provides the connectivity between Apttus and DocuSign. The DocuSign for Apttus connector uses the DocuSign REST API to send document and record information to DocuSign to take over the eSignature process.



Document Overview

This document is divided into quick start, installation, configuration, and using sections.

Installing DocuSign for Apttus	This section includes detailed information on the installation requirements, as well as the post-install configuration that must be completed. This section also serves as a reference for administrators.
Configuring DocuSign for Apttus	This section includes information on creating templates for eSignature documents and creating tags in DocuSign.
DocuSign for Apttus Objects	This section includes a list of objects used in DocuSign for Apttus.

Installing DocuSign for Apttus

- Pre-Installation Requirements
  Before you install the DocuSign for Apttus packages, you must ensure that you have set up your DocuSign account and specific DocuSign users for each Apttus user you want to have access to the DocuSign functionality within Salesforce.
- Installing Apttus DocuSign
  The process for installing and setting-up DocuSign for Apttus
- Post-Installation Configuration
  After you have installed the packages and ensured that the correct users have access to the functionality, you should configure the options that are generally set once and then left alone.

Pre-Installation Requirements

Before you install the DocuSign for Apttus packages, you must ensure that you have set up your DocuSign account and associate DocuSign user profile for each Apttus user you want to have access to the DocuSign functionality within Salesforce.

DocuSign provides both production and development/sandbox environments. You can get a free developer account from the DocuSign Developer Center. The following task describes how to set up your sandbox account. For a full production environment, you can contact DocuSign or contact your Apttus representative who can provide some assistance, if you do not already have a production version of DocuSign. Production and Sandbox accounts are separate and require separate logins.

> ⓘ Apart from the initial set up of a production or sandbox account, both environments are configured in the same manner.

To set up a sandbox account and link it to Apttus User Account

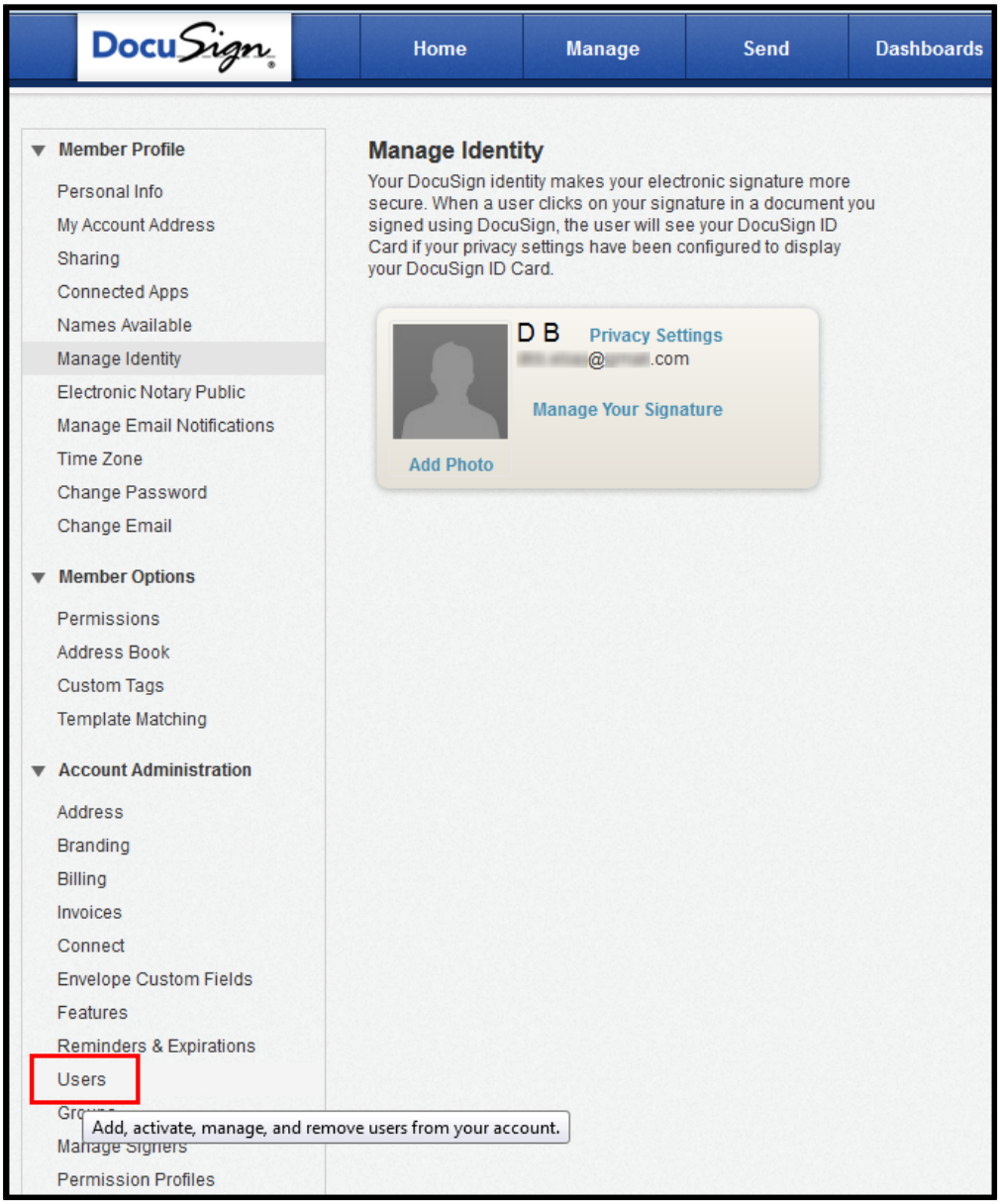
You must have an Apttus user account in Salesforce that you can associate with a user account in DocuSign.

1. Go to the DocuSign Developer Center and click **Buy Now.** Enter your details and submit the form.

   > You must use the email address of the Apttus user whose account you want to link to DocuSign. An email is sent to the email address you enter. You must activate your account.

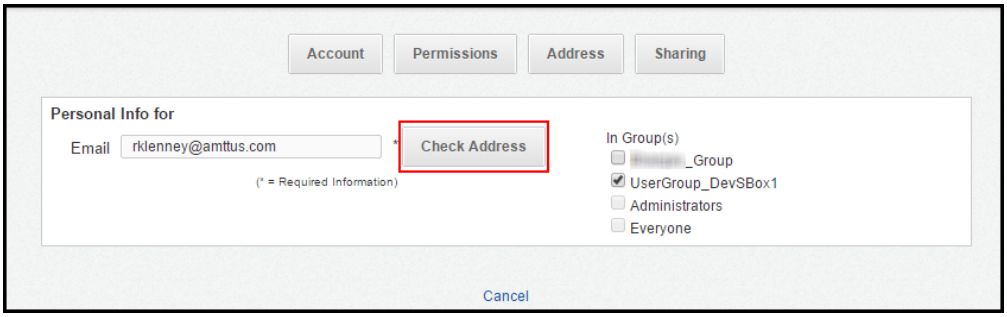
2. From the **Home** tab, click Edit for the DocuSign ID Card, and then click **Member Profile > Personal Info.** This displays your Email, Name, Company, and Job Title, if entered.
3. Select **Account Administrator** from the **Permission Profile** list and click **Save.**

4. To create another user associated with an Apttus User account, under Account Administration, click the **Users** tab.



5. Click New , enter the email address in **Email** text box that corresponds to the email address of the user in Salesforce. Select the check box of corresponding group from **In Groups,** if you want to include the user that you are adding in an existing Account Signing Group.

6. Click **Check Address.** These additional users must be in the same Salesforce org as the initial user, who was used to create the sandbox account.

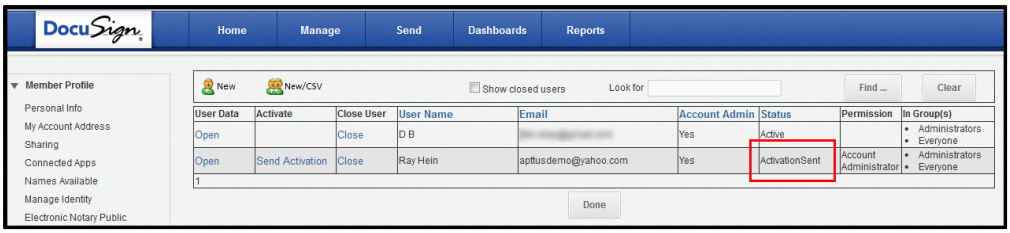


7. Complete the following fields.

Field Name	Description
Email	Enter the email address of the user you want to add.
Name	Enter the Name of the user that you want to add.
Company	Enter the name of the Company where your user works.
Job Title	Enter the designation of your user.
Permission Profile	Select the Permission Profile. The available options are. • Account Administrator - Select this option if you want to add the user as an Administrator. Selecting this option provides user all administrative rights which includes managing Users. Groups, Reminders & Permissions Profiles, Locked Out Users and all other administrative tasks. • DocuSign Sender - Select this option if you want to add the user as a DocuSign Sender. Selecting this option provides user the rights to send the document for eSignature. • DocuSign Viewer - Select this option if you want to add the user as a DocuSign Viewer. Selecting this option provides user the rights to view and sign the documents
Language	Select the Language of account.
In Group (s)	This section displays all existing Account Signing Groups. Select the group (s) in which you want to include your user.

8. Click **Save.**

9. Enter the **Access Code** to help validate the user's access and then click **Send.**
   The user is added to the user list with a **Status of ActivationSent.**



   A link is sent to the email address for the user that must be clicked to activate the account.

10. Activate the account via the email and complete the initial login to DocuSign.

You now have users setup in DocuSign that can be associated to different Apttus users in the same org.

After installing the DocuSign for Apttus packages, assign the user profile permissions and associate the appropriate Apttus users to those created in DocuSign.

Installing Apttus DocuSign

To install the Apttus DocuSign packages,

1. Go to the **Install Center** tab on the Apttus Community Portal.
2. Under My Packages, click the **DocuSign Integration** tab.
3. Select the version that you want to install from the Version drop-down menu.
4. Click **Install Now.**
5. Select the environment in which you want to install the packages.
6. Enter your Salesforce Credentials and click **Log In.**
7. Enter the **Password** provided by Apttus.
8. Select the **Security Level.** If you know the required settings, select the third option, otherwise, it is recommended you select the second option and refine the security settings as required later. The options are: Grant access to admins only, Grant access to all users and Select security settings.
9. Click **Upgrade**. You will receive an email when the installation of packages is successful.

Repeat the task for the Apttus Contract DocuSign Integration and/or Apttus Quote DocuSign Integration package.

Post-Installation Configuration

Subsequently, you have installed the packages and ensured that the correct users have access to the functionality, you can configure the options that are generally set once and then left alone. While the system properties can be altered at any time, typically you want to set them up to work best with your business requirements. The system properties fall into three different categories: sync settings, server settings, and changing document settings. You can utilize the Translation Workbench to change the Email Subject and Email Body text.

- DocuSign Permissions
  The permissions need granted to User Profiles associated with users working with DocuSign. If you do not grant these permissions, the DocuSign Users may face issues while using and configuring DocuSign for Apttus.
- Associating an Apttus user to a DocuSign account
  Once you have created an account and added users in DocuSign, you must associate those users to the users in Apttus.
- Auto-Provisioning a DocuSign User
  If the user who logged into the Salesforce org is not a registered DocuSign user, you as an Administrative user, can configure the system to provide them an account using the Salesforce org.
- eSignature Buttons for the Agreement and Quote/Proposal Object
  To initiate the DocuSign signature process and later check the signature status, you must have the relevant buttons available on the Agreement and Proposal object.
- Server Configuration
  Basic server configuration includes both System Properties and Remote Site Settings that must be configured.
- Changing Document Options
  These properties are used to control how you want to work with the documents that are sent for eSignature.
- Setting Default Recipient Properties
  You can configure default recipients who receive the agreement or contract for signature.

- System Properties Reference Table
  The Comply and DocuSign System Properties referenced throughout this chapter, are also listed here.
- Configuring Email Text
  You can change the default text that is used in the email subject and email body sent to signatories, by changing System Properties that are used to provide that email text.
- Adding DocuSign Recipients Related List
  For an agreement or a proposal that you send for eSignature, you can add and configure a list of default recipients who will receive the agreement or proposal. This section lists the procedures to add the default recipients related list to your Agreement or Proposal and to change the page layout assignments.

DocuSign Permissions

The following permissions need to be granted for user profiles associated withuserswho will be working with DocuSign. If you do not grant these permissions, the DocuSign user may face issues while using and configuring DocuSign for Apttus.

Custom Object Layouts	System Administrator	Sales User	Comply User	Legal
DocuSign Account Configuration	Default	Default	Default	Default
DocuSign Callout Transient	Default	Default	Default	Default
DocuSign Default Recipient (Deprecated)	Default	Default	Default	Default
DocuSign Envelope	Default	Default	Default	Default
DocuSign Envelope	Default	Default	Default	Default
DocuSign Envelope Document	Default	Default	Default	Default
DocuSign Envelope Recipient	Default	Default	Default	Default

Custom Object Layouts	**System Administrator**	**Sales User**	**Comply User**	**Legal**
DocuSign Envelope Recipient Status	Default	Default	Default	Default
DocuSign Recipient	Default	Default	Default	Default
DocuSign Recipient Status	Default	Default	Default	Default
DocuSign Signing Group Member	Default	Default	Default	Default
DocuSign Status	Default	Default	Default	Default
DocuSign User	Default	Default	Default	Default
Custom Field-Level Security	**System Administrator**	**Sales User**	**Comply User**	**Legal**
DocuSign Account Configuration	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Callout Transient	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Default Recipient (Deprecated)	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Envelope	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Envelope	All fields enabled	All fields enabled	All fields enabled	

Custom Object Layouts	System Administrator	Sales User	Comply User	Legal
				All fields enabled
DocuSign Envelope Document	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Envelope Recipient	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Envelope Recipient Status	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Signing Group	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Signing Group Member	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Status	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign User	All fields enabled	All fields enabled	All fields enabled	All fields enabled
Custom Tab Settings	**System Administrator**	**Sales User**	**Comply User**	**Legal**

DocuSign Admin	Default On	Tab Hidden	Tab Hidden	Tab Hidden
DocuSign Configuration Home	Default On	Tab Hidden	Tab Hidden	Tab Hidden
DocuSign Demo	Default Off	Tab Hidden	Tab Hidden	Tab Hidden
DocuSign Envelope Recipient Status	Default On	Tab Hidden	Tab Hidden	Tab Hidden
DocuSign Envelopes	Default Off	Tab Hidden	Tab Hidden	Tab Hidden
DocuSign Status	Default Off	Tab Hidden	Tab Hidden	Tab Hidden
DocuSign Users	Default Off	Tab Hidden	Tab Hidden	Tab Hidden
Custom Record Type Settings	**System Administrator**			
DocuSign Account Configurations	NA			
DocuSign Callout Transients	NA			
DocuSign Envelopes	NA			
DocuSign Envelopes	NA			
DocuSign Recipients				

Custom Object Layouts	System Administrator	Sales User	Comply User	Legal
	Signing Group, Contact (Default), Email, User			

Custom Object Permissions	System Administrator	Sales User	Comply User	Legal
DocuSign Account Configurations				
DocuSign Callout Transients	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Default Recipients (Deprecated)				
DocuSign Envelope	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Envelope	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Envelope Documents	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Envelope Recipient				Read

Custom Object Layouts	System Administrator	Sales User	Comply User	Legal
	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	
DocuSign Envelope Recipient Status	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Recipients				
DocuSign Recipient Status	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Signing Groups				
DocuSign Signing Group Members				
DocuSign Status	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign User	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
Enabled Apex Class Access				

Custom Object Layouts	System Administrator	Sales User	Comply User	Legal
Apttus_CMDSign. CMDocuSignEnvelopeStatusSubscriber2	Enabled	Enabled	Enabled	Enabled
Apttus_QPDSign. QPDocuSignEnvelopeStatusSubscriber2	Enabled	Enabled	Enabled	Enabled
Apttus_DocuApi.*	Enabled	Enabled	Enabled	Enabled

Managing Users

- Associating an Apttus User to a DocuSign account
  Once you have created an account and users in DocuSign, you must associate those users to the users in Apttus.

> The feature of creating a DocuSign Account from DocuSign Configuration Home page has been discontinued. You can no longer provision new accounts to your users from DocuSign for Apttus. To create an account on DocuSign, go to DocuSign.

Associating an Apttus user to a DocuSign account

Once you have created an account and users in DocuSign, you must associate those users to the users in Apttus. Doing this enables the user to access the Apttus-provided functionalities using Salesforce org, which includes sending an agreement for eSignature by clicking the *eSignature* button on an agreement record, select which document to send, and which recipients to send it to. While there are other fields that can be completed for a user, you must ensure the First Name, Last Name, and Email address match between the user's Apttus user account and DocuSign user account.

To associate an Apttus user to DocuSign account

You must have an existing DocuSign account.

To have the DocuSign Configuration Home tab available by default, click **All Tabs** and then click **Customize My Tabs** to add it to one of your *Custom App*.

1. In Salesforce, click the **DocuSign Configuration Home** tab.
2. Click the **Setup DocuSign Account** tab.

Ideally, Setup DocuSign Account tab should be accessible by the Administrative Users only. If you want to restrict the non-Administrative users from accessing the Setup DocuSign Account page, you must restrict the access of DocuSign Account Setup page for the users of that profile. Perform the following steps to restrict the page access:

a. Go to **Setup > Administer > Manage Users** and select **Profiles**.

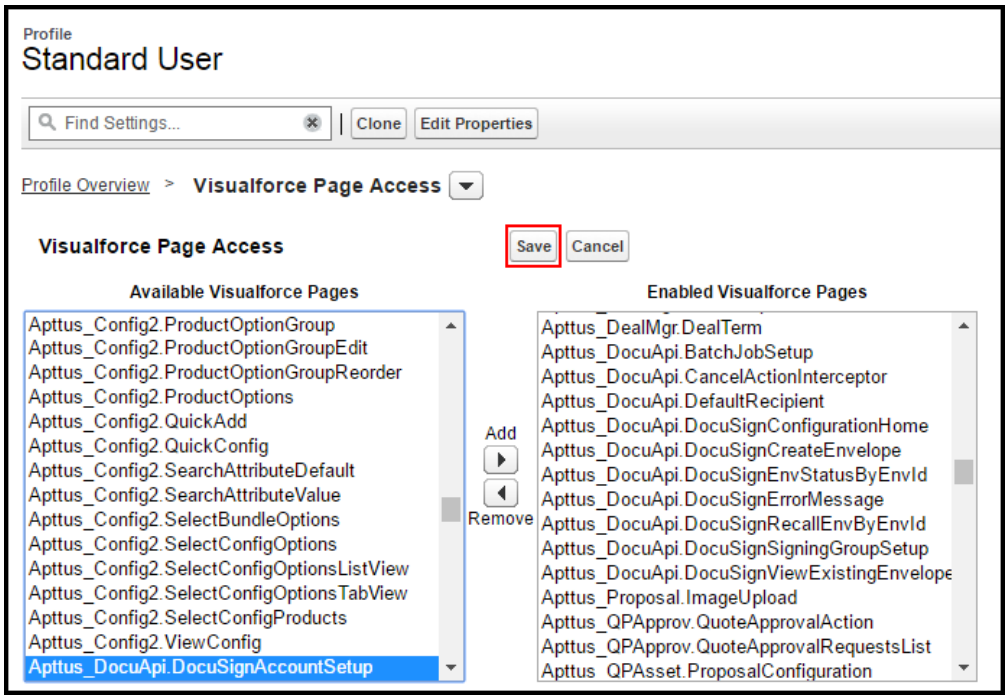
b. Select the profile for which you want to restrict the access to.

c. Under the Apps section, select **Visualforce Page Access**.

d. Click **Edit**.

e. From Enabled Visualforce Pages, select **DocuSign Account Setup** and click .

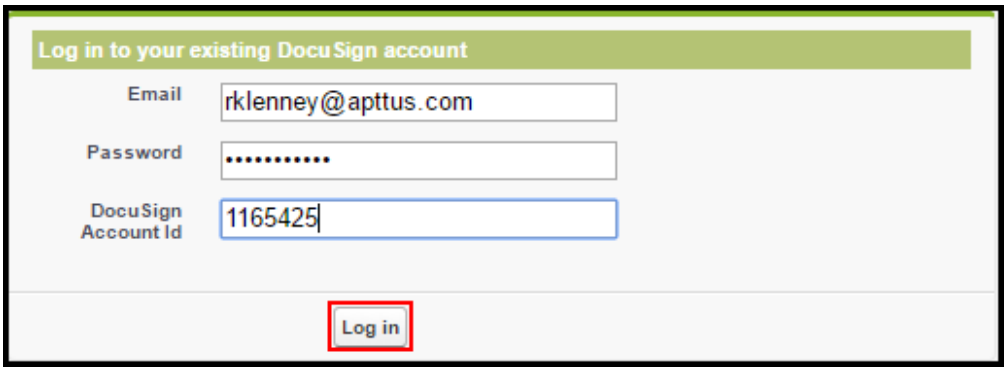
f. Click **Save**.



Perform these steps for all the users that you want to restrict the page access for. The Setup DocuSign Account tab will now be disabled for the users of the profile that you have restricted the access for.

3. Complete the following fields.

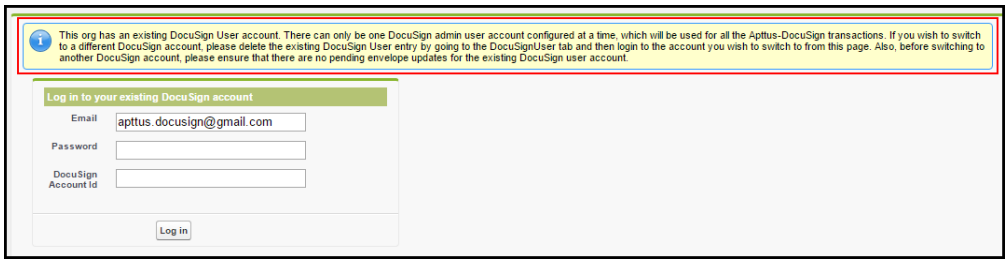
Field	Description
DocuSign UserName	Enter the email address of the Apttus user who has a corressponding DocuSign account. The email address should be the same address entered for the user in DocuSign.
DocuSign Password	Enter the password for the email address mentioned in DocuSign Username.
DocuSign Account Id	Enter the Account Id of your DocuSign account.



4. Click **Log In**.

Note

When you have an existing DocuSign User record and you try to log in to your existing DocuSign account using DocuSign Configuration Home, a message is displayed notifying that a DocuSign Administrative User already exists.



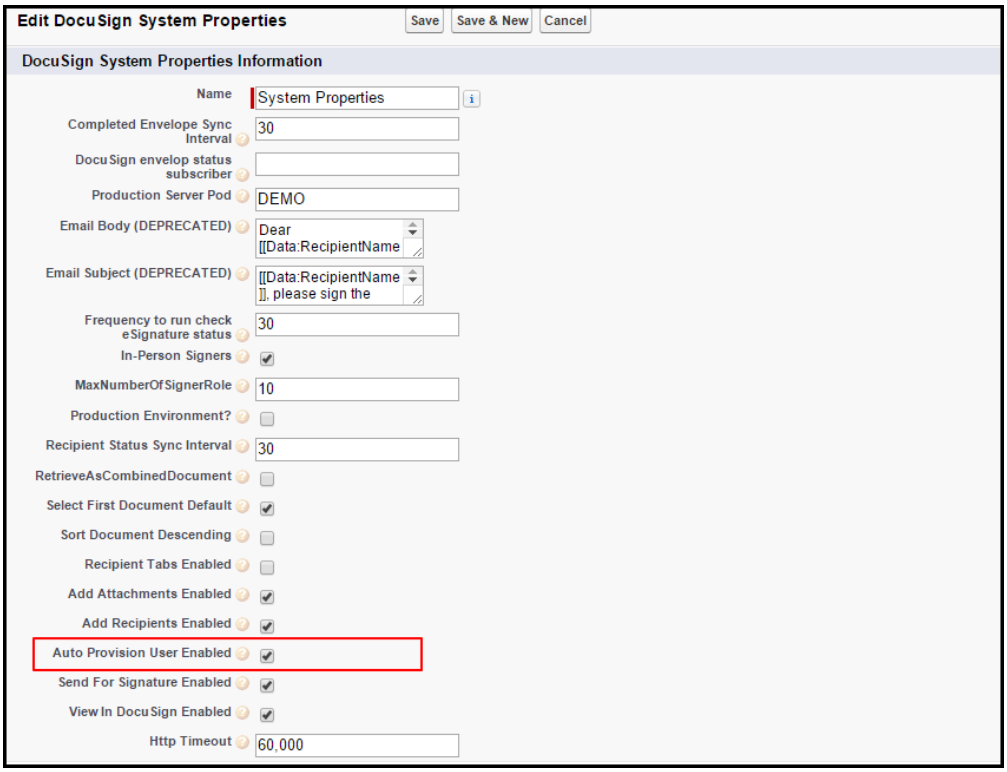
Using DocuSign's REST API, a user is created in Apttus, that corresponds to a DocuSign user in DocuSign. You can go to the DocuSign User tab and view the details for the user.

Auto-Provisioning a DocuSign User

Previously, if the user who logged into the Salesforce org was not a registered DocuSign user, they could not send a document for signature. You can now auto-provision the users logged into your Salesforce org based on the DocuSign licensing agreement and licenses rendered to your account.

To enable Auto-provision a DocuSign User feature

Navigate to **App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties** and enable the **Auto Provision User Enabled** check box.



If you select the Autoprovision User Enabled check box and the user logged in Salesforce is not a DocuSign User, the user is automatically provisioned in DocuSign when the user clicks Send for e-signature for an agreement or a quote.

The account is provisioned on the back end without interrupting the work flow of the user unless the org that the user is a part of was installed without Apttus initially. In this case, an email is sent to the user in order to confirm their account creation.

When you auto-provision a user ensure that you

1. **Auto-Provision User Enabled** check box in DocuSign System Properties is selected.
2. Activate the user account manually in DocuSign or through email. Once the user account is active, they can send a document for eSignature.
3. Click the **DocuSign Configuration Home** tab, and re-enter docusign login and password. You can also create a new DocuSign User Account from this page. The user account needs to be activated manually before you proceed to login.

Note

If your user is rendered an Auto-provisioned account, the user must enter the **Company Name** in his Salesforce org.

Settings

You must ensure the following post-installation settings are done within your account.

- eSignature buttons for the Agreement and Quote/Proposal object
- Server Configuration
- Changing Document Options
- Setting Default Recipient Properties

eSignature Buttons for the Agreement and Quote/Proposal Object

To initiate the DocuSign signature process and later check the signature status, you must have the correct buttons available on the agreement and quote record object.

The fields may already be available on the default page layouts, so you would only need to complete the following for custom layouts.

From Setup, go to **Create > Objects > Agreement > Page Layouts** and click **Edit** for the page layout you want to use with DocuSign eSignatures. Go to the **Fields** list, and drag the following fields onto the page:

- *Send For eSignature (Apttus_CMDSign.SendForESignature)*
- *Check eSignature Status (Apttus_CMDSign.CheckESignatureStatus)*
- *Recall E-Signature Request (Apttus_CMDSign. RecallESignatureRequest)*
- *Correct E-Signature Document (Apttus_CMDSign.ViewESignatureDocument)*

From Setup, go to **Create > Objects > Quote/Proposal > Page Layouts** and click **Edit** for the page layout you want to use with DocuSign eSignatures. Go to the **Fields** list, and drag the following fields onto the page:

- *Send For eSignature (Apttus_QPSign.SendForESignature)*
- *Check eSignature Status (Apttus_QPSign.CheckESignatureStatus)*
- *Recall E-Signature Request(Apttus_QPSign.RecallESignatureRequest)*
- *Correct E-Signature Document (Apttus_QPSign.ViewESignatureDocument)*

Server Configuration

Both System Properties and Remote Site Settings must be configured. Initially, you can use a sandbox or demo server to test your DocuSign for Apttus implementation and once you are ready to go live you can switch over to a production server. These two system properties handle that requirement.

App Setup > Develop > Custom Settings > DocuSign System Properties	
Name	**Description**
Production Server Pod	Indicates which server the DocuSign for Apttus integration points to,either DEMO server when using a sandbox account or PRODUCTION server when using a production account. This setting is dependent on the Production Environment setting. That setting indicates whether it's production or development, while this setting specifies the actual name of the server. You can now specify the value in the following format: https://<instance-name>.docusign.net/restapi/v2/
Production Environment?	Checking this indicates that the DocuSign production server is to be used. If it is not checked a development/sandbox server will be used. If it is unchecked it will connect to a DEMO server, regardless of what value is in Production Server Pod.

If the settings mentioned below do not already exist, you must create two *Remote Site Settings* in the table below. After being set up, these settings need not be changed. Enter the Name, the corresponding URL and ensure they are both *Active*.

Administration Setup >SecurityControls > RemoteSiteSettings	
Remote Site Name	**Remote Site URL**
DemoDocuSign	https://demo.docusign.net
ProdDocuSign	https://www.docusign.net

Changing Document Options

These properties are used to control how you want to work with the documents that are sent for eSignature.

App Setup > Develop > Custom Settings > DocuSign System Properties	
Name	**Description**
MaxNumberOfSignerRole (Deprecated)	This sets the maximum number of *Signer role* fields that will be available.
RetrieveAsCombinedDocument	Selecting this option generates a single PDF document containing all documents that were signed during the eSignature process. If this is not checked, each document will result in a separate PDF.
In-Person Signers	This indicates that a signer is in the same physical location as a DocuSign user who will act as the signing host for the document signing. This recipient type can only be used if enabled for the DocuSign account associated with the org. This must be selected to have the option available from the *Signer Type* list when selecting recipients. The In-person Signer passes control to a Docusign user who can sign on their behalf.

Setting Default Recipient Properties

You can now configure default recipients who receive the agreement or contract for signature. The Default Recipients can not be deleted from the Recipient List. The following managed properties control the behavior of default recipients.

Develop > Custom Setting > Comply System Properties or Proposal System Properties		
Property	**Description**	**Behavior**
		If this option is selected,

Develop > Custom Setting > Comply System Properties or Proposal System Properties		
Property	**Description**	**Behavior**
Auto Select Recipient Field	Allows you to specify a contact field that will be used as default recipient for the eSignature.Note: If the field name is specified, then one recipient from the specified field is auto-selected. For a given implementation and application, either this option or auto-select multiple recipient option should be selected. If both are selected, then auto-select multiple recipient option will take precedence over the one recipient option.	The default recipient from the contact field is displayed on the eSignature envelope. This field requires the API name of a field containing the recipient you would like to have auto-selected when sending a document for eSignature. You must ensure this user has an email address, as you cannot edit them once they have been added. For instance, you can enter Apttus_Proposal__Primary_Contact__c or Apttus__Primary_Contact__c to have the primary contact on the proposal or agreement record added automatically as a recipient. You should then ensure the agreement record has a valid user with an email address in that field. The Recipient's field becomes a read-only field once an eSignature request is initiated. When Auto-Select Attachment is not selected, the user is redirected to the Select Attachment screen.
		If this option is not selected, you can select recipients while initiating an eSignature request.
Auto-Select multiple recipients?	Allows projects to specify a list of recipients that will have defaulted for the eSignature.	If this option is selected, the default recipient from the DocuSign Recipients related list is fetched and populated on the eSignature envelope.

Develop > Custom Setting > Comply System Properties or Proposal System Properties		
Property	**Description**	**Behavior**
	To use this option, add DocuSign Recipients related list on the agreement or quote and specify the list for each agreement or quote.	If this option is not selected, you can select recipients when an eSignature request is initiated.
Auto-Select Attachment	This property allows you to auto-select latest modified attachment from the parent document.	If set to true, The system will auto-select the latest modified document. The system will show the Read-Only selection on the Preview screen. • If Auto-Select Recipient (one or multiple) is not selected, the user is redirected to the Select Recipient page. **Specify the following validation message**: • If this option is selected, and the user has not selected any attachment on the parent document,and an eSignature request is initiated then show No attachments available for eSignature. Add an attachment before initiating the eSignature request. **Note:** This option is overridden by **Select First Document Default** setting in System Properties. The system will consider Select First Document Default setting first.

System Properties

The following managed properties are used throughout this document.

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
Name	**Description**
Completed Envelope Sync Interval (Deprecated)	A System setting to refresh data from DocuSign for scheduled job in minutes on each hour. If more than one value is to be entered, must be comma separated values.
DocuSign Envelope Status Subscriber	Class names to be called by Envelope Status Sync job update extension objects.
Production Server Pod	Indicates which server the DocuSign for Apttus connector points to, either DEMO server when using a sandbox account or PRODUCTION server. This setting depends on the Production Environment? setting which indicates whether it's a production or a development environment. Whereas this setting specifies the actual name of the server. You can now specify the value in the following format: https://<instance-name>.docusign.net/restapi/v2/
Email Body (Deprecated)	This field allows you to set the default Email Message to be sent for eSignature requests. The only static text is allowed in this field. You cannot add HTML text or merge fields.
Email Subject (Deprecated)	This field allows you to set the default Email Subject to be sent for eSignature requests. The only static text is allowed in this field. You cannot add HTML text or merge fields.
Frequency to run check eSignature status (Deprecated)	A System setting to refresh data from DocuSign for scheduled job in minutes on each hour. If more than one value of frequency (in minutes) is to be entered, must be comma separated values.
In-Person Signers	

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
	This setting indicates that a signer is in the same physical location as a DocuSign user who will act as the signing host for the document signing. This recipient type can only be used if enabled for the DocuSign account associated with the org. This must be selected to have the option available from the *Signer Type* list when selecting recipients. The In-person Signer passes control to a DocuSign user who can sign on their behalf.
MaxNumberOfSignerRole (Deprecated)	This setting sets the maximum number of *Signer role* fields that will be available in the document to be sent for eSignature.
Production Environment?	Selecting this check box indicates that the DocuSign production server is to be used. If it is unchecked it will connect to a demo server, regardless of what value is in *Production Server Pod*.
Recipient Status Sync Interval (Deprecated)	A System setting to refresh data from DocuSign for scheduled job in minutes on each hour. If more than one value is to be entered, must be comma separated values.
RetrieveAsCombinedDocument	Selecting this option generates a single PDF document containing all documents that were signed during the eSignature process. If this is not checked, each document will result in a separate PDF. You can also combine documents based on record type. To combine documents based on record type, refer to **Admin Objects** topic in *Contract Management User Guide*.

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
Select First Document Default	Checking this selects the most recently modified document in the agreement record's Notes & Attachments section as the document to be signed. If this is not checked, you can select one or more of the documents to be sent for eSignature. This custom setting is overridden by Select All Attachments custom setting. For more information, refer to FAQs.
Sort Document Descending	Checking this sorts documents starting with which one has been updated most recently. If this is not checked, the documents are sorted based on how they are listed in Notes & Attachments.
Recipient Tabs Enabled	Tabs are specific to each recipient and designated for each recipient. Selecting this checkbox enables the Recipient Tabs for recipient addition or subtraction.
Add Attachments Enabled	Selecting this check box enables you to add additional attachments to be sent to recipients when you navigate to a Contract or Proposal and click Send for Signature.
Add Recipients Enabled	Selecting this check box enables the Add Recipients button when you navigate to a Contract or Proposal and click Send for Signature. The recipients you add receive the documents for eSignature. For more information on disabling recipient configuration, refer to FAQs.
Auto Provision User Enabled	If the user you have logged-in with is not a DocuSign licensed user, the user cannot send a document for eSignature to intended recipients. Selecting this checkbox enables you to auto-provision the user as a DocuSign user account based on the licensing agreement and licenses rendered to your org by DocuSign.

Send for Signature Enabled	Selecting this check box enables the Send for eSignature button when you navigate to a Contract or Proposal and click Send for Signature. Clicking this button sends the attached document to the specified recipients.
View In DocuSign Enabled	Selecting this check box enables the Finalize in DocuSign button when you navigate to a Contract or Proposal and click Send for Signature. Clicking this button enables you to view the final document as it would appear to the recipients with the custom Apttus fields (DocuSign tabs) enabled.
Http Timeout	Adjusts the Http call timeout limit. The default value for this field is 30,000 (milliseconds) and the maximum value is 120,000. For more information on the behavior of this setting, refer to FAQs.
Include Certificate	Selecting this check box retrieves a PDF containing the DocuSign Certificate of Completion after signing. Works in combination with Retrieve as a Combined Document setting. For more information on the behavior of this setting, refer to FAQs.
Edit Email Enabled	Selecting this check box enables the user to edit the Email Subject and Email Body. The Preview button is also visible and you can resolve any merge fields in email subject and email body. When disabled, the user will not be able to edit the email subject and email body and preview button is disabled.
Recipient Roles Enabled	

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
	Selecting this check box enables the users to make the tagging order explicit by selecting the recipient role name while adding a recipient. When enabled, users will see an additional option list to select the role name for the recipient on the Add Recipient view.
Remove Recipient Ordering	Selecting this check box enables the user to remove the order buttons from Add Recipient screen. When disabled, arrow buttons will be visible and affect the tagging order. **Note:** When Recipient Roles Enabled check box is selected, Remove Recipient Ordering is ignored.
Sync Apttus Created Envelopes Only	Selecting this check box will sync only Apttus created Envelopes when you run a batch job.
One-Click Send	Selecting this check box enables you to send documents with a single click. Your agreement or quote/proposal must have at least one attachment in Notes and Attachments section, and one recipient in DocuSign Recipients related list. When the user clicksSendforeSignature, the document in Notes & Attachment section is sent to the default recipient.
Profiles Enabled for Finalize	This system property works only if View in DocuSign Enabled check box is selected. Finalize in DocuSign button will be visible only to the profiles mentioned in this system property. You must enter the name of the Profiles for which you want to display the View in Finalize button. You can enter multiple profile names, separated by commas. The character limit for this text box is 255 characters only, as defined by Salesforce.

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
	For example, if you have selected View in DocuSign Enabled check box and you mention System Administrator, Platform User in Profiles Enabled for Finalize, then all the users of both mentioned profiles will be able to view Finalize in DocuSign button while sending the document for eSignature. However, if you have selected View in DocuSign Enabled check box and you leave the Profiles Enabled for Finalize system property blank, then all the users will be able to view Finalize in DocuSign button while sending the document out for eSignature. If you do not select **View in DocuSign Enabled,** Finalize in DocuSign button is not visible to any profiles marked as Profiles Enabled for Finalize.
Profiles Enabled for Finalize 2	Comma-separated names of the user profiles that need to see the **Finalize in DocuSign** button on the DocuSign Console. The character limit for this text box is 255 characters. This system property is useful if the number of user profiles that you need to register cannot be accommodated in 255 characters provided by the system property, **Profiles Enabled for Finalize.** This system property provides additional 255 characters extending the total character count to **510 characters.**
Profiles Enabled for Finalize 3	Comma-separated names of the user profiles that need to see the **Finalize in DocuSign** button on the DocuSign Console.The character limit for this text box is 255 characters. This system property is useful if the number of user profiles that you need to register cannot be

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
	accommodated by the system properties, **Profiles Enabled for Finalize** and **Profiles Enabled for Finalize 2.** This system property provides additional 255 characters extending the total character count to **765 characters.**
Use Default Reminders & Expiration	Selecting this check box enables you to set default values for the Reminders and Expiration days on the Additional Details page. When you select this check box, the users will not be able to view the fields pertaining to Reminders and Expiration on the Additional Details page. If you have unchecked this custom setting and the user leaves blank values on the Additional Details page, the default values that are set in Reminders and Expiration in DocuSign account are used by the system. If you have unchecked this custom setting and the user enters some values on the Additional Details page, the values entered by the user are used by the system.
DocuSign Templates Enabled	Selecting this check box enables you to load the DocuSign Templates into Apttus. You can then use the templates that you have created in DocuSign, in Apttus. When checked, Agreement Template drop-down menu is visible on the Additional Details page. If your system admin has enabled your profile for template selection, you can select the templates that you have created in DocuSign. When unchecked, Agreement Template drop-down menu is not visible on the Additional Details page.
Profiles Enabled for Template Selection	You must have selected DocuSign Templates Enabled checkbox to use this custom setting.

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
	Enter the Profile names of all the profiles for which you want to enable the template selection. You can enter multiple profiles separated by a comma. If you do not mention any profile names in this custom setting, all profiles are enabled for template selection. For example, System Administrator, Gold User, Standard User
DocuSign Batch Processing Disabled	This flag indicates whether to use Apex batch job to process DocuSign eSignature request or not. If set to true, the request is processed synchronously. The default is unchecked.

App Setup > Develop > Custom Settings > DocuSign System Properties > DocuSign Custom Classes	
Name	**Description**
Add Recipient Tabs Callback Class	Enter the name of the Callback class to be used for adding arecepient. For example, DocuSignEnvelopeSetRecipientTabs2Imp
Return Recipient Tabs Callback Class	Enter the name of the Callback class to be used for returning a recipient. For example, DocuSignEnvelopeGetRecipientTabs2Imp

Note

The fields shown in the tables below are the only fields that matter. The rest are copies of System Properties fields that won't affect anything unless they are set in System Properties only.

App Setup > Develop > Custom Settings > DocuSign System Properties > ProposalWorkflow	
Name	**Description**
Name	Enter *ProposalWorkflow*. For the quote integration to work as expected, this needs to be the value.
DocuSign Envelope Status Subscriber	Class names to be called byEnvelope Status Sync job update extension objects. Forversion 1.6 and higher, use the value **Apttus_QPDSign. QPDocuSignEnvelopeStatusSubscriber2** For versions 1.5 and lower use the value **Apttus_QPDSign. QPDocuSignEnvelopeStatusSubscriber**.

App Setup > Develop > Custom Settings > DocuSign System Properties > Contract Management Workflow	
Name	**Description**
Name	Enter *Contract Management Workflow*. For the agreement integration to work as expected, this needs to be the value.
DocuSign Envelope Status Subscriber	Class names to be called byEnvelope Status Sync job update extension objects. For versions 1.6 and higher, use the value**Apttus_CM**, use the value **DSign. CMDocuSignEnvelopeStatusSubscriber2**.For versions 1.5 and lower, use the value **Apttus_CMDSign.CMDocuSignEnvelopeStatusSubscriber**.

Comply System Properties

The Comply System Properties are used to control the System Properties pertaining to an agreement or contract.

To access Comply System Properties, go to **App Setup > Develop > Custom Settings > Comply System Properties > System Properties.**

The following managed comply system properties pertaining to the DocuSign object are used throughout this document.

Name	Description
Auto Select Attachment?	This property allows you to auto-select latest modified attachment from the parent document. If set to true, System will auto-select the latest modified document. System will show the Read-Only selection on the Preview screen. • If Auto-Select Recipient (one or multiple) is not selected, the user is navigated to the Select Recipient page. **Specify the following validation message**: • If this option is selected, and the user has not selected any attachment on the parent document, and an eSignature request is initiated then show "No attachments available for eSignature. Add an attachment before initiatingeSignaturerequest". **Note:** This option is overridden by **Select First Document Default** setting in System Properties. The system will consider Select First Document Default setting first.
Enable Document Preview in DocuSign App	Selecting this check box enables a preview of the email, with resolved merge fields, to be sent before you actually send the document out for eSignature.
Auto Select Recipient Field	If this option is selected, The default recipient from the contact field is displayed on the eSignature envelope. This field requires the API name of a field containing the recipient you would like to have auto-selected when sending a document for eSignature. You must ensure this user has an email address, as you cannot edit them once they have been added. For instance, you can enterApttus_Proposal__Primary_Contact__c

Name	Description
	or Apttus__Primary_Contact__cto have the primary contact on the proposal or agreement record added automatically as a recipient. You should then ensure the agreement record has a valid user with an email address in that field. The list of recipients becomes a read-only list onceaneSignaturerequest is initiated. When Auto-Select Attachment is not selected, the user is redirected to the Select Attachment screen. If this option is not selected, you can select recipients when an eSignature request is initiated.
Select Attachments from Related /Sibling	Selecting this check box fetches the documents from the Notes & Attachments related list of all the related, child, or sibling agreements.
Auto-Select Multiple Recipients?	Selecting this check box allows you to specify a list of recipients that will be defaulted for the eSignature. To use this option, add a DocuSign Recipients related list on the agreement or quote and specify the list for each agreement or quote. If this option is selected, the default recipient from the DocuSign Recipients related list is fetched and populated on the eSignature envelope. If this option is not selected, you can select recipients when an eSignature request is initiated.
eSignature Strict Mode	For future release.
One Click Send	Selecting this check box enables One Click Send feature to directly send the document for eSignature using just one click. **Note:** To use this feature, there must be at least one attachment in the Notes & Attachments related list and one contact in the DocuSign Recipient related list.

Name	Description
Filter RSPC By Primary Agreement Status	Selecting this check box filters the documents from related, sibling, parent, and child agreements by Primary Agreement Status for the Add Attachments screen.
Update RSPC Agreement Status	Selecting this check box updates the Agreement Status of related, sibling, parent, and child agreements along with Primary Agreement Status.
Select All Attachments	Selecting this check box will auto-select all the attachments on the Add Attachment page. This custom setting overrides the Select First Document Default custom setting. If you have checked Select First Document Default custom setting and checked Select All Attachments custom setting, all documents on the Add Attachments page will be auto-selected. If you have unchecked Select First Document Default custom setting and checked Select All Attachments custom setting, all documents on the Add Attachments page will be auto-selected. If you have unchecked Select First Document Default custom setting and unchecked Select All Attachments custom setting, none of the documents on the Add Attachments page get selected. If you have checked Select First Document Default custom setting and unchecked Select All Attachments custom setting, only the first document on the Add Attachments page will be auto-selected.

Proposal System Properties

The Proposal System Properties are used to control the System Properties pertaining to the Quote /Proposal.

To access Proposal System Properties, go to App **Setup > Develop > Custom Settings > Proposal System Properties > System Properties**.

The following managed proposal system properties pertaining to DocuSign are used throughout this document.

Name	Description
Auto Select Attachment?	This property allows to auto-select latest modified attachment from the parent document. If set to true, System will auto-select the latest modified document. System will show the Read-Only selection on the Preview screen. • If Auto-Select Recipient (one or multiple) is not selected, the user is navigated to the Select Recipient page. **Specify the following validation message**: • If this option is selected, and the user has not selected any attachment on the parent document, andaneSignaturerequestis initiated then show "No attachments available for eSignature. Add an attachment before initiatingeSignaturerequest". **Note:** This option is overridden by **Select First Document Default** setting in System Properties. The system will consider Select First Document Default setting first.
Enable Document Preview in DocuSign App	Selecting this check box enables a preview of the document to be sent before you actually send the document out for eSignature.
Auto Select Recipient Field	If this option is selected, The default recipient from the contact field is displayed on the eSignature envelope. This field requires the API name of a field containing the recipient you would like to have auto-selected when sending a document for eSignature. You must ensure this user has an email address, as you cannot edit them once they have been added. For instance, you can enterApttus_Proposal__Primary_Contact__c

Name	Description
	or Apttus__Primary_Contact__cto have the primary contact on the proposal or agreement record added automatically as a recipient. You should then ensure the agreement record has a valid user with an email address in that field. The read-only list of recipients onceaneSignaturerequest is initiated. When Auto-Select Attachment is not selected, the user is redirected to the Select Attachment screen. If this option is not selected, you can select recipients whenaneSignaturerequest is initiated.
Select Attachments from Related /Sibling	Selecting this check box fetches the documents from the Notes & Attachments related list of all the related or sibling agreements.
Auto-Select Multiple Recipients?	Selecting this check box allows you to specify a list of recipients that will be defaulted for the eSignature. To use this option, add DocuSign Recipients related list on the agreement or quote and specify the list for each agreement or quote. If this option is selected, the default recipient from the DocuSign Recipients related list is fetched and populated on the eSignature envelope. If this option is not selected, you can select recipients whenaneSignaturerequest is initiated.
eSignature Strict Mode	For future release.
One Click Send	Selecting this check box enables One Click Send feature to directly send the document foreSignatureusing just one click. **Note:** To use this feature, there must be at least one attachment in the Notes & Attachments related list and one contact in the DocuSign Recipient related list.
Select All Attachments	

Name	Description
	Selecting this check box will auto-select all the attachments on the Add Attachment page. This custom setting overrides the Select First Document Default custom setting. If you have checked Select First Document Default custom setting and checked Select All Attachments custom setting, all documents on the Add Attachments page will be auto-selected. If you have unchecked Select First Document Default custom setting and checked Select All Attachments custom setting, all documents on the Add Attachments page will be auto-selected. If you have unchecked Select First Document Default custom setting and unchecked Select All Attachments custom setting, none of the documents on the Add Attachments page get selected. If you have checked Select First Document Default custom setting and unchecked Select All Attachments custom setting, only the first document on the Add Attachments page will be auto-selected.

Adding DocuSign Recipients Related List

For an agreement or a proposal that you send to the signer for signature, you can add and configure a list of recipients who receive the agreement or proposal. This section provides the procedures to add the recipients related list to your Agreement or Proposal and to change the page layout assignments.

To add DocuSign recipients related list

1. Click the **Agreements** tab, select an agreement and click the **Edit Layout** link.
2. From the layout pane, click **Related Lists**.
3. Drag and drop DocuSign Recipients in the Related Lists area.

> **Attention**
>
> Do not drag and drop DocuSign Default Recipients (Deprecated) related list.

4. In the DocuSign Recipients related list added, click (wrench icon) to configure the fields for the default recipients.
5. From the Available list, select Recipient type, Contact, User, Recipient First Name, Last Name, Email, and Signing Order and any additional fields that you require.
6. Click the icon.
7. Specify the layouts in which you want the changes to be applicable.
8. Expand Buttons, to view the button properties available for the related list.
9. Deselect the **New** check box and add **New eSigner - Agreement** to the Selected Buttons list.

   > Apttus recommends you to use custom button **New eSigner - Agreement** when working in Classic mode and to use default **New** button when working in Lightning Experience enabled mode.

10. Click **OK**.
11. Click **Save**.

The DocuSign Recipient list is available on the Agreement with the configured column and button properties visible. You can perform the same steps on Quote or Proposal Object.

To change page layouts

1. Go to Setup > Build > Create > Objects and select the **DocuSign Recipient** object.
2. In the Page Layouts related list, click **Page Layout Assignment**.
3. Click **Edit Assignment**.
4. Specify the profiles and the page layout to be used against the profile.
5. Click **Save**.

The page layout changes are applicable for the profiles against which they are set.

Adding Custom Email Subject and Email Body

When you send out your documents for signature to your recipients, you can also customize the email in which you send the document. You can customize the Email Subject and Email Body. Apttus for DocuSign allows you to leverage Salesforce functionality inside DocuSign. It enables you to add dynamic data in your email using Salesforce Merge Fields. You can set an org-wide email and enter the merge fields inside the email message.

You can add the Custom Email Subject and Email Body from **Custom Labels**. The customized message that you add in Email Subject Text and Email Body Text will be visible to your users under the **Additional Details** link on the upper right corner once he clicks Send for the Signature button.

You must ensure that the Salesforce org that your user is using must have at least one contact defined with an email address.

If your users are not able to edit Email Subject and Email Body using Additional Details while sending the document for eSignature, you might have disabled **Edit Email Enabled** check box in System Properties. For more information, refer to System Properties.

Note

You will see EmailSubjectText and EmailBodyText as custom labels for the core object (Apttus DocuSign API), Apttus Contract Management, and Apttus Proposal Management. **You do not need to configure the email subject text and email body text for Apttus DocuSign Api.** Perform the steps mentioned below to configure Email Subject Text and Email Body Text from the Custom Labels for the package that you are using.

EmailBodyText	EmailText	Default email body text for DocuSign recipient email	Sent to you by: [FirstName] [LastName] [Email] with the DocuSign Electronic Signature Service Please review and electronically sign this request using the link below. Thank you, [FirstName] [LastName] [Email]	Apttus DocuSign Api
EmailBodyText	EmailText	Default EMail Body text for DocuSign recipient email	Request for eSignatures. Please review and sign.	Apttus Contract DocuSign Integration
EmailBodyText	EmailText	Default email body text for Apttus DocuSign CPQ connector	Request for eSignatures. Please review and sign.	Apttus Quote DocuSign Integration

EmailSubjectText	EmailText	Default email subject for DocuSign recipient email	Documents for your eSignature	Apttus DocuSign Api	English
EmailSubjectText	EmailText	Default email subject text for Apttus DocuSign CLM connector	Request for eSignatures	Apttus Contract DocuSign Integration	English
EmailSubjectText	EmailText	Default email subject text for Apttus DocuSign CPQ connector	Request for eSignatures	Apttus Quote DocuSign Integration	English

To customize deliverability of emails

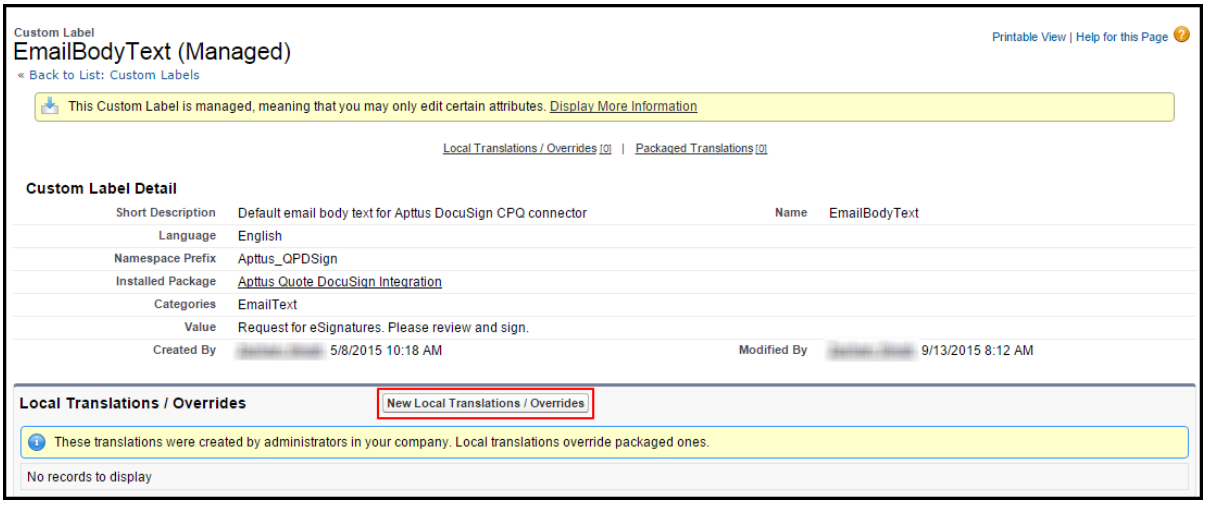
1. Go to **Setup > Administer > Email Administration > Deliverability** and select **All Email** from Access Level picklist menu.
2. Click **Save**.

To configure custom email body

1. Go to **Setup > Build > Create > Custom Labels** and click **Edit** for EmailBodyText. (Installed Package: Apttus Contract DocuSign Integration or Apttus Quote DocuSign Integration)

> You must have Translation workbench enabled. To enable Translation Workbench, go to **Setup > Administer > Translation Workbench > Translation Settings** and click **Enable**. Then click **Add** and select **English**. Add the Users you want to add for English language and click **Save**.

2. Click **Edit**.
3. Under the Translations related list, click **New Local Transactions / Overrides**.



4. From the **Language** picklist, select the language you want to translate your email body text.

5. Enter the message that you want to enter for your recipients in **Translation Text** text box. You can also enter Salesforce Merge Field values in your translation text.

To determine a merge field value

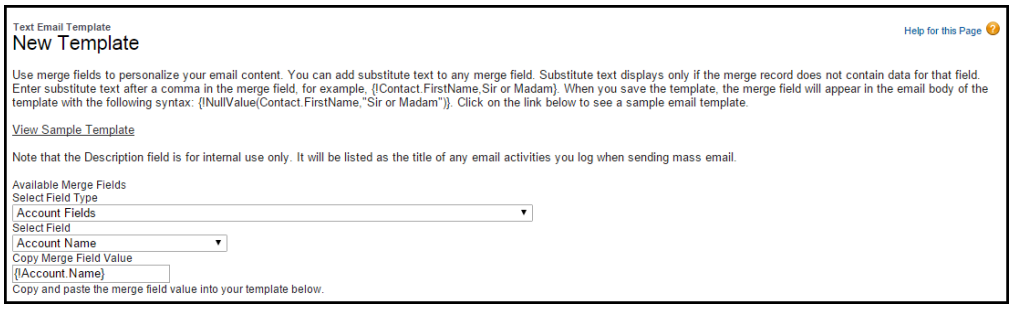
a. Go to **Setup > Administer > Communication Templates > Email Templates**.

b. Click **New Template**.

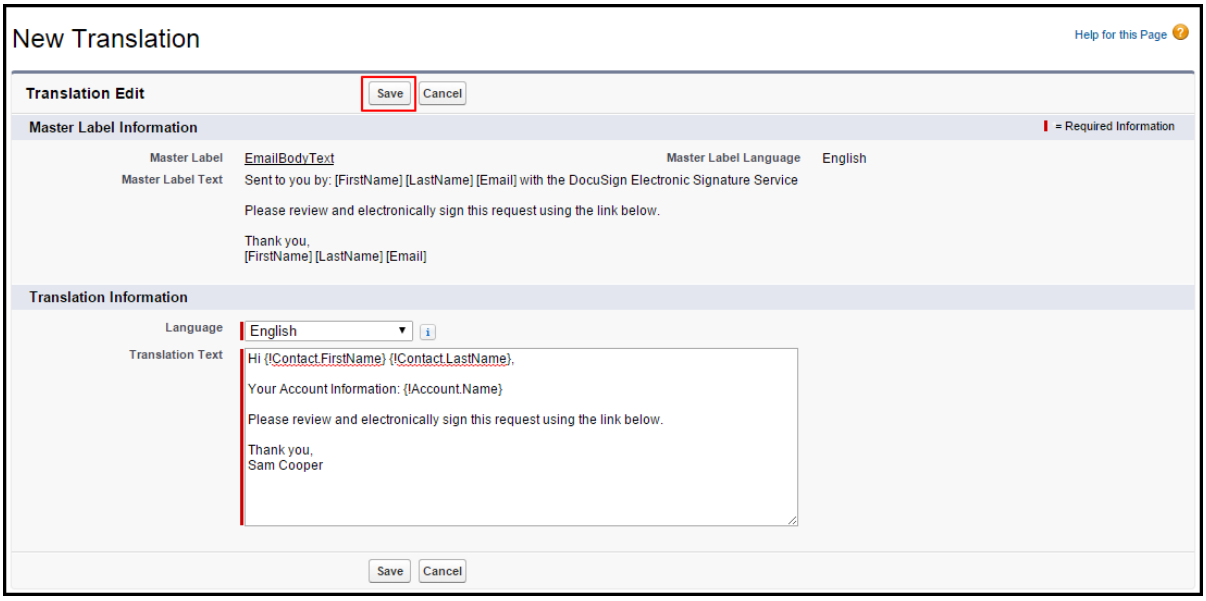
c. Select **Text** radio button and click **Next**.

d. Select the **Field Type** and select the **Field**.

e. Copy the **Merge Field Value** and paste it in your Translation Text.



6. Click **Save**.

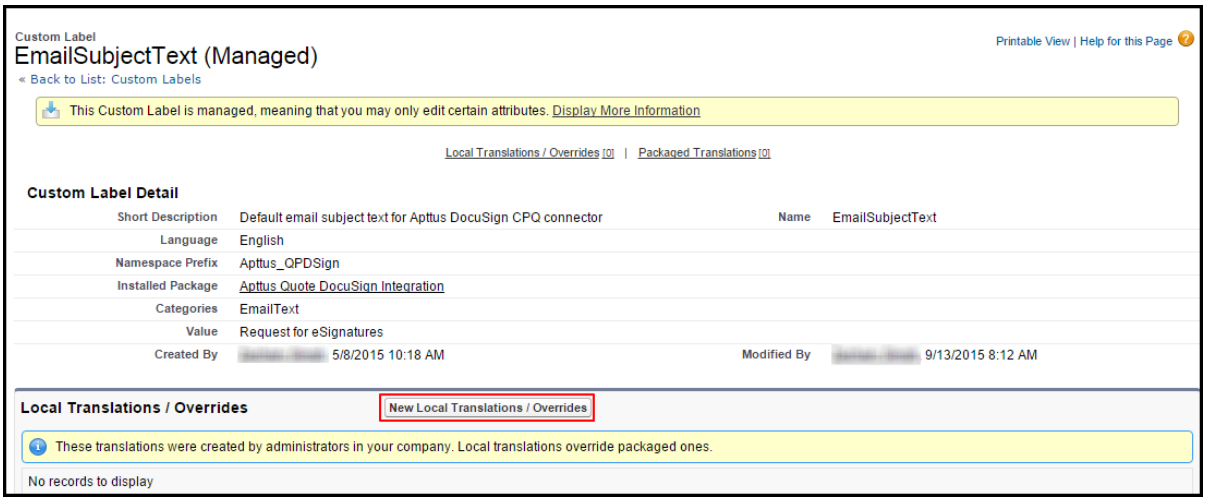


To configure custom email subject

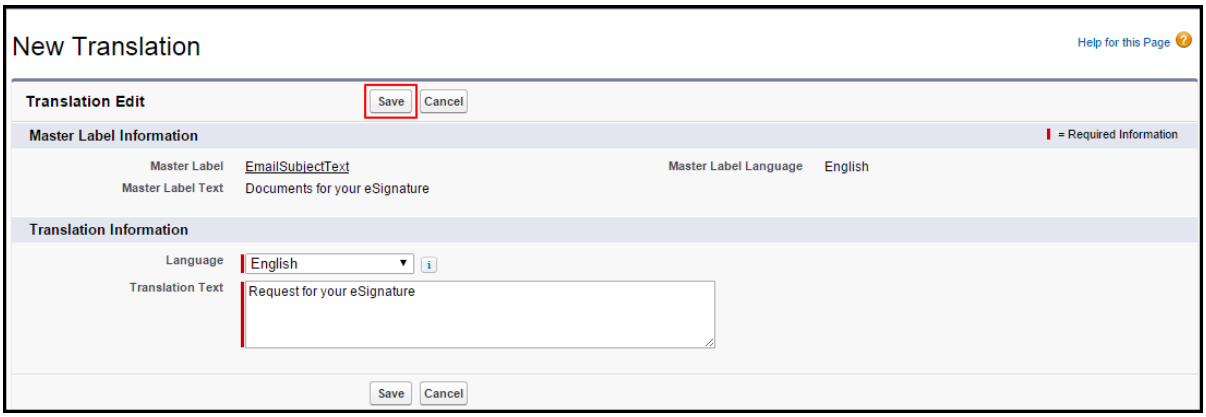
1. Go to **Setup > Build > Create > Custom Labels** and click **Edit** for EmailSubjectText. (Installed Package: Apttus Contract DocuSign Integration or Apttus Quote DocuSign Integration)

> You must have Translation workbench enabled. To enable Translation Workbench, go to **Setup > Administer > Translation Workbench > Translation Settings** and click **Enable**. Then click **Add** and select **English**. Add the Users you want to add for English language and click **Save**.

2. Click **Edit**.
3. Under the Translations related list, click **New Local Translations / Overrides**.



4. From the **Language** picklist, select the language that you want to translate your email subject to.
5. Enter the message that you want to enter for your recipients in **Translation Text**. You can also enter Salesforce Merge Field values in your translation text.
6. Click **Save.**



Configuring Multiple Email Templates

Multiple Email Templates enable you to configure specific email messages for each of your recipients so the individual recipients receive different messages. You can customize your workflow to change the message of each recipient.

You can configure an email template from a field called **Email Template**. This field can be accessed by selecting the appropriate user under DocuSign Users tab. For now, this feature supports the email templates of **Text** type only. This includes Salesforce Merge Fields, but does not support HTML type of templates. The user must enter the unique Template name in the Email Template field.

Note

If you select a template of HTML type or you type an incorrect Email Template Unique name, then email message configured in Additional Details or the Custom Labels (EmailSubjectText and EmailBodyText) will be sent as an email to your recipients.

Usecase

We have an administrative user Sam Coop who wants to send an agreement for signature to three recipients - Fast Suppliers, Roxop Cleaners, and Rusty. Sam Coop would like to include different email messages to his recipients. Sam Coop can configure Templates. He defines template Test 001 for Fast Suppliers. He does not define any template for Roxop Cleaners. And, defines template Test for Rusty.

To implement this scenario, Sam must have at least one recipient defined in the DocuSign Recipients related list, must have at least one document attached in Notes & Attachments section, and must have configured an email template.

The following table displays the scenarios where the email templates can be configured.

Scenario	Send to Fast Suppliers / Unique Template Name defined	Send to Roxop Cleaners / Unique Template Name defined	Send to Rusty / Unique Template Name defined	Message in Custom Labels	Edited Message in Additional Details	Result
Scenario 1	Yes / No	No / No	No / No	Yes	Yes	The document wi be sent to Fast Suppliers. Thoug we have email subject text and email body text defined in the Custom Labels, t recipient will rece the message adc in Additional Deta MessageinAdditi Details will overri the message tha set using Custom Labels.
Scenario 2	Yes / Yes	Yes / No	No / No	Yes	No	The document wi be first sent to Fa Suppliers. We ha defined Email Subject and Ema Body in Custom Labels. However

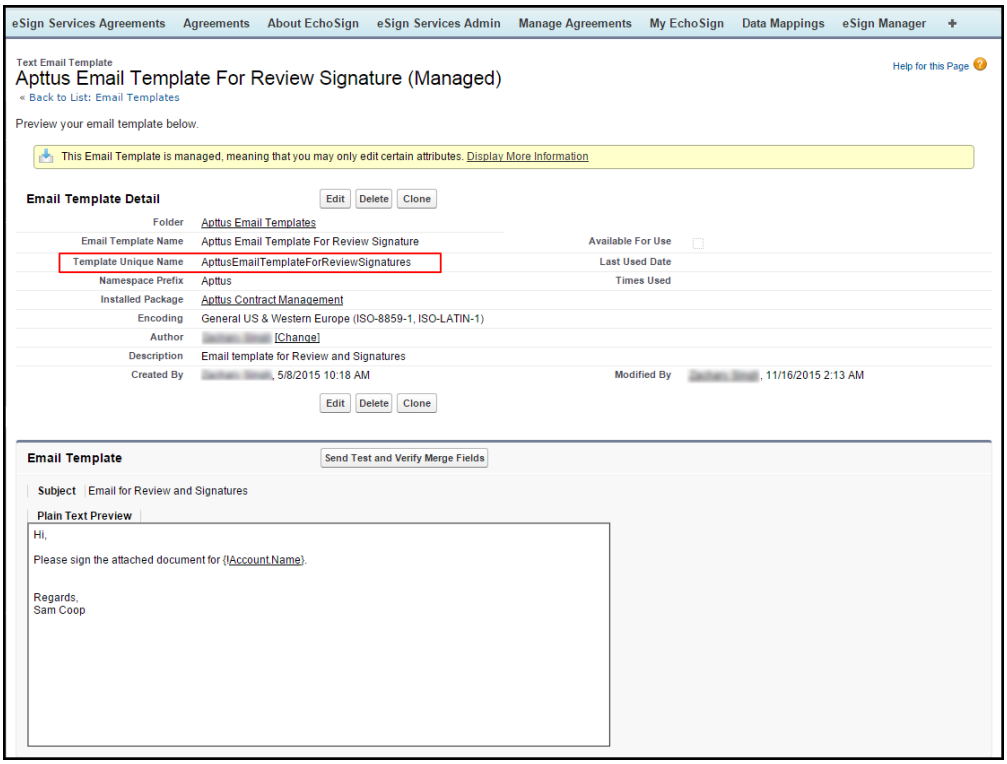
Scenario	Send to Fast Suppliers / Unique Template Name defined	Send to Roxop Cleaners / Unique Template Name defined	Send to Rusty / Unique Template Name defined	Message in Custom Labels	Edited Message in Additional Details	Result
						we have defined Unique Template Name in DocuSig Recipient. FastSuppliers wil receive the message defined the template that defined in the Unique Template Name. And, Roxo Cleaners will rec the message tha has been defined Email Subject an Email Body in the Custom Labels.
Scenario 3	Yes / Yes	Yes / No	No / No	Yes	No	The document wi be first sent to Fa Suppliers. We ha defined Email Subject and Ema Body in Custom Labels. However we have defined Unique Template Name in DocuSig Recipient. FastSuppliers wil

Scenario	Send to Fast Suppliers / Unique Template Name defined	Send to Roxop Cleaners / Unique Template Name defined	Send to Rusty / Unique Template Name defined	Message in Custom Labels	Edited Message in Additional Details	Result
						receive the message defined the template that defined in the Unique Template Name. And, Roxo Cleaners will rece the message that has been edited i Additional Details
Scenario 4	Yes / Yes	Yes / No	Yes / Yes	Yes	Yes (for Roxop Cleaners)	The document wi be first sent to Fa Suppliers. This recipient will rece the message that has been defined the Template. Th the document is sent to Roxop Cleaners. This recipient will rece the message that has been edited i the Additional Details section. A finally the documentis sent Rusty. This recip will receive the

Scenario	Send to Fast Suppliers / Unique Template Name defined	Send to Roxop Cleaners / Unique Template Name defined	Send to Rusty / Unique Template Name defined	Message in Custom Labels	Edited Message in Additional Details	Result
						message that ha been defined in t template.

To determine email template unique name

1. Go to **Setup > Administer > Communication Templates > Email Templates** and select the template for which you want to find the unique email template name.
2. The email template unique name is shown in the image below.



3. Copy the **Template Unique Name** and paste it in Template Unique Name as described in step 9. For more information on this step, refer to Adding Recipients.

Retrieving DocuSign Certificate of Completion

You can retrieve **DocuSign Certificate of Completion** combined with the fully signed document or as an individual document. **Include Certificate** check box must be selected to enable this feature. It works in combination with **Retrieve As Combined Document** check box. To enable this feature, you must have at least one recipient in the DocuSign Recipient related list and at least one document in Notes & Attachments related list.

Refer to the following table to learn more about the behavior of these custom settings.

Scenario	Include Certificate checked?	Retrieve as a Combined Document checked?	Attach Certificate of Completion to the Envelope PDF checked? (In DocuSign Account)	Behavior
Scenario 1	No	No	No	Admin receives the final signed PDF (separatePDFs of multiple documents are attached) but the Certificate of Completion is not received.
Scenario 2	No	Yes	Yes	Admin receives the final signed PDF with the last page containing the DocuSign Certificate of Completion.
Scenario 3	Yes	Yes	Yes	Admin receives the final signed PDF with the last page containing the DocuSign Certificate of Completion.
Scenario 4	Yes	No	No	

Scenario	Include Certificate checked?	Retrieve as a Combined Document checked?	Attach Certificate of Completion to the Envelope PDF checked? (In DocuSign Account)	Behavior
				Admin receives the final signed PDF (separatePDFs of multiple documents are attached) and a Certificate of Completion both as a separate document.
Scenario 5	Yes	Yes	No	Admin receives the final signed PDF but the certificate of Completion is not received.

To enable include certificate feature

1. Go to **Setup > Build > Develop > Custom Settings**.
2. Click **Manage** for DocuSign System Properties.
3. Click **Edit** for System Properties.
4. Select the **Include Certificate** check box.
5. Click **Save**.

To enable retrieve as a combined document feature

1. Go to **Setup > Build > Develop > Custom Settings**.
2. Click **Manage** for DocuSign System Properties.
3. Click **Edit** for System Properties.
4. Select the **Retrieve as Combined Document** check box.
5. Click **Save**.

To enable attach certificate of completion to the envelope pdf feature in docusign account

1. Go to https://www.docusign.com.
2. Loginto DocuSign using your credentials.
3. Click the User Menu and select **Preferences**.
4. Under Account Administration, select **Features**.
5. Select the **Attach the Certificate of Completion to the Envelope PDF** check box.
6. Click **Save**.

> **Note**
>
> If you are using the Related Agreements feature, the Certificate of Completion is returned only to the Primary Agreement.

Scheduling Batch Jobs

Scheduling the batch job for checking the eSignature status enables the users to retrieve the Agreement Status. The DocuSign for Apttus connector allows you to check eSignature status by two ways - Manual and Automatic.

Manually, you click **Check eSignature Status** button and retrive the Agreement Status. If you do not click Check eSignature Status button, the system will automatically update the status **if you have set up a batch job**. Once the documents have been signed, you can check the status. The signed documents are added to the Notes and Attachments section. The Status is also updated to Fully Signed. The recipients must sign the agreement documents in DocuSign to further update the status. The CheckeSignature status button does not appear when the Agreement status is Fully Signed or when the Signature is declined.

To schedule a batch job

You must have sent a document out for signature.

Go to **Setup > Develop > Visualforce Pages**.

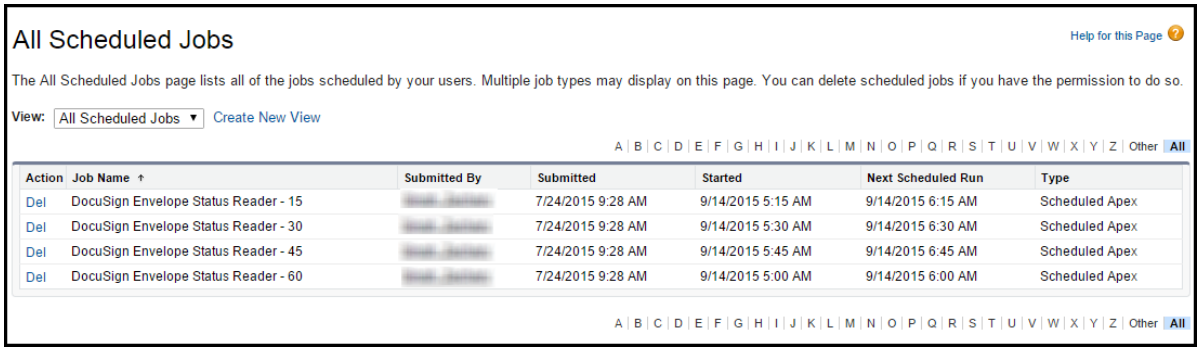
1. Click letter **B** and Select **Batch Job Setup** page.
2. Click **Preview**.

> **Note**
>
> Step 2 will schedule the batch job.

To ensure that you have scheduled the batch job, Go to **Setup > Administration > Monitoring > Scheduled Jobs**.

You will see the following batch jobs scheduled.

- DocuSign Envelope Status Reader - 15
- DocuSign Envelope Status Reader - 30
- DocuSign Envelope Status Reader - 45
- DocuSign Envelope Status Reader - 60



Configuring DocuSign for Apttus

- Configuring DocuSign Tags
  You can configure the tags you want to use in your templates that are available in DocuSign.
- Configuring Templates
  Templates are configured in the typical way using X-Author; however, you can add DocuSign specific markup that indicates you want to have a tag inserted in the document when it is generated.
- Adding Custom Fields to the Envelope
  When you send the documents for eSignature, you add custom DocuSign tags to the document. You can choose to set some initial values to the fields and also fetch the updated values, if any, from the fields in the template.
- Configuring Signer Roles
  Signer Roles enable the users to make the tagging order explicit. They can define the roles and have signers sign at specific signing place.
- Configuring Signer Groups
  Signer Groups enable the administrator to create a group with multiple users. This helps in sending the document to multiple users.
- Configuring Reminders and Expiration
  Reminders and Expirationenables the admin user to define the validity ofaneSignature request. The Administrator can set default reminders and expirationfrom DocuSign account. The Administrator can set permissions if he wants to let the users override the reminders and expiration.
- Configuring One-Click Send for Specific Envelopes
  Enabling One-Click Send custom setting in System Properties enables One-Click Send feature for all the documents. You can configure One-Click Send for specific envelopes by passing a parameter in the URL.

Configuring DocuSign Tags

You must have the tags you want to use in your templates available in DocuSign. For all of the markers that you create when configuring agreement templates, you need to create them from the **Member Options > Custom Tags** section in DocuSign. The main difference between the tags in the template and in DocuSign, is that you can create one tag for each type and use a variable *{r}* to handle multiple recipients.

For instance, in a template you may need to have *|na1|*, *|na2|*, and *|na3|* to account for the 3 recipients of a document, while in DocuSign you just need to create a *|na{r}|* tag. To cover standardeSignature requirements the following set of tag types would make a good start:

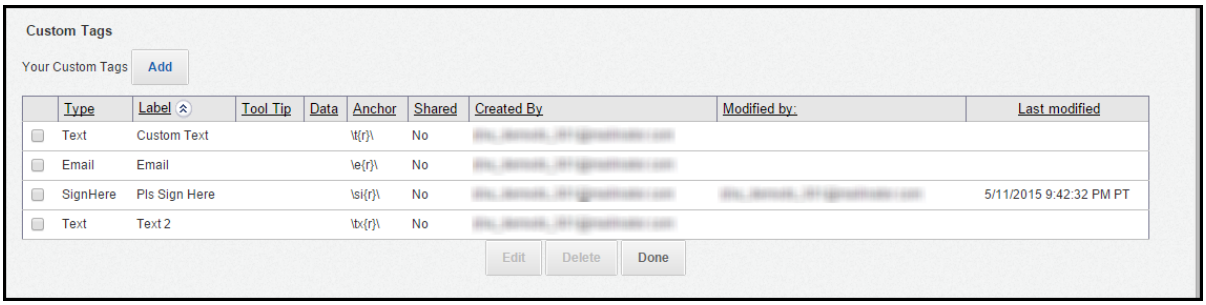
- Signature - *|si{r}|*
- Initial - *|in{r}|*
- Optional Initial - *|oin{r}|*
- Name - *|na{r}|*
- Company - *|cy{r}|*
- Title - *|ti{r}|*
- Date Signed - *|ds{r}|*

There are many other tag types available in DocuSign that you can create to handle the requirements of your implementation.

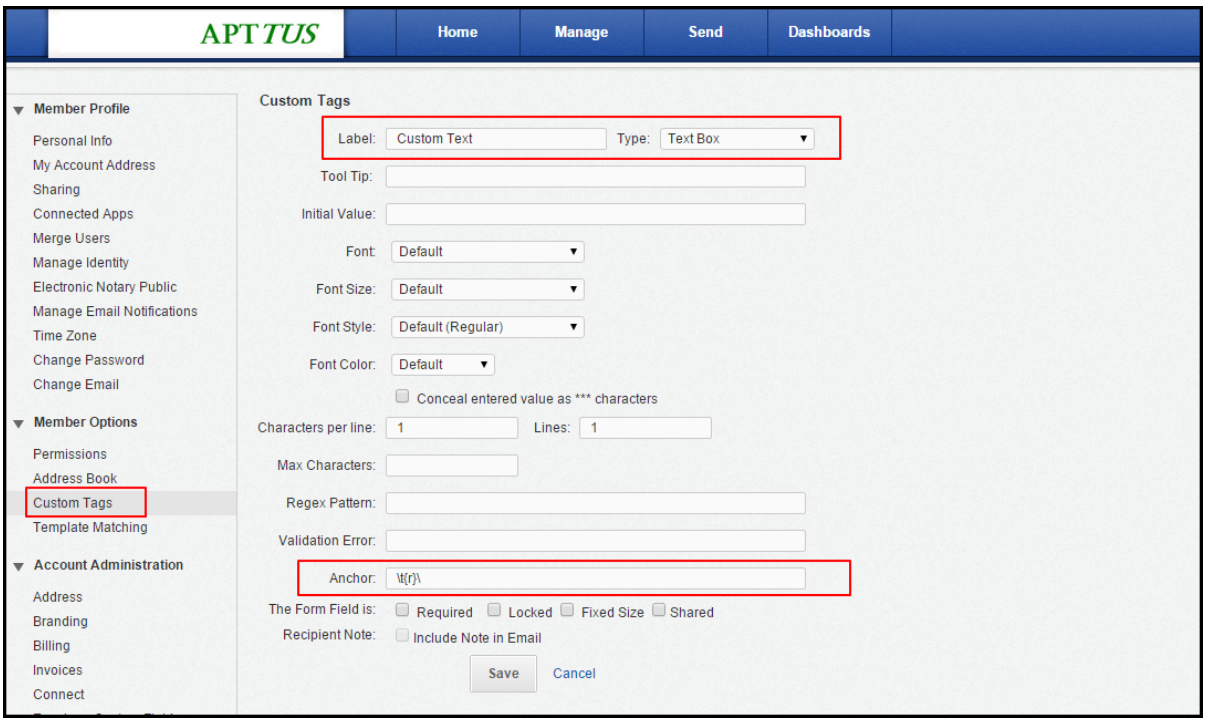
> **Note**
>
> DocuSign has seven characters they use as automatic tags. While these tags have a prescribed purpose, DocuSign could change their purpose which could impact your implementation. Therefore Apttus encourages you to create your own tag nomenclature or follow the examples used here.
>
> The DocuSign automatic tag characters are: *n*, *s*, *i*, *oi*, *co*, *t*, and *d*.

To configure DocuSign tags

1. From the Home tab, click **Edit** for the DocuSign ID Card, and then click **Member Options > Custom Tags**.



2. Click **Add** and from the **Type** list, select a type that you will be using in your Apttus templates, such as *Text Box*.
3. Enter a **Label, Tool Tip**, and **Anchor**. For the anchor, the text is the same as what is typed in your Apttus templates, except you replace the number with *{r}*. For instance, for *Text Box* you would enter *|t{r}|*.



4. Select **Shared** if you want the tags to display in documents generated by all users. If you do not select it, the tags will only work when the user who creates the tag generates a document.
5. Click **Save**.

The tag is added to the Custom Tags list. When you generate a document with a template that includes the Apttus equivalent of the tag created in DocuSign, it will be displayed when the recipient goes to sign the document.

You should create a new tag for each type of tag you plan to use in your templates.

The corresponding tags must be created in your Apttus templates as well if you want them to be included in eSignature documents.

Configuring Templates

Templates are configured in the typical way using X-Author; however, you can add DocuSign specific markup that indicates you want to have a tag inserted in the document when it is generated.

These tags are used to display the **Sign Here** and **Initial Here** notes within the generated documents that are sent for eSignature. You can include these tags for multiple signatories, the below table showing tags for up to four. It is based on the suggested tag types, and characters to use with them, listed for configuring the DocuSign tags.

The tag types are entered into the templates as standard text.

Tag Type	Signer 1	Signer 2	Signer 3	Signer 4
Signature	\si1\	\si2\	\si3\	\si4\
Initial	\in1\	\in2\	\in3\	\in4\
Optional Initial	\oin1\	\oin2\	\oin3\	\oin4\
Name	\na1\	\na2\	\na3\	\na4\
Company	\cy1\	\cy2\	\cy3\	\cy4\
Title	\ti1\	\ti2\	\ti3\	\ti4\
Date Signed	\ds1\	\ds2\	\ds3\	\ds4\

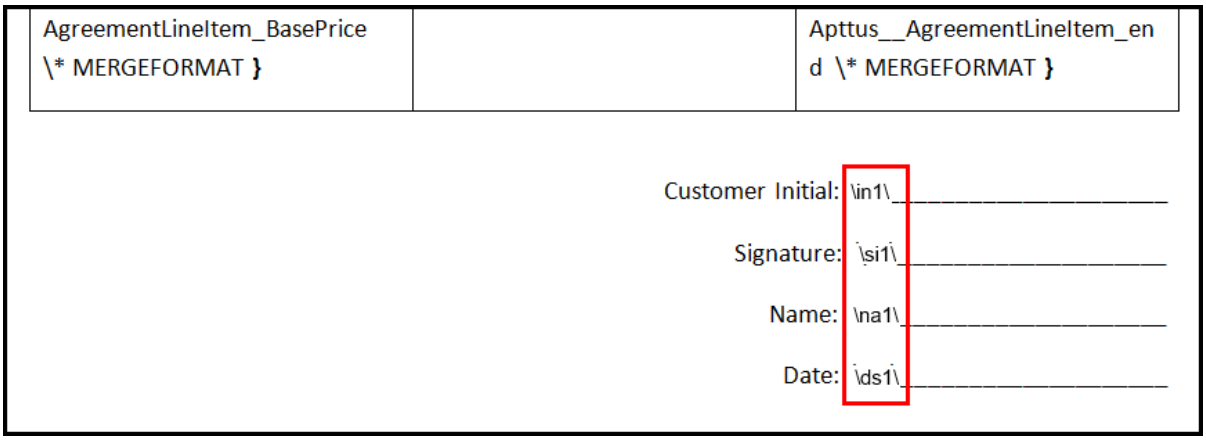
Tag Type	Signer 1	Signer 2	Signer 3	Signer 4
Checkbox	\cb1\	\cb2\	\cb3\	\cb4\
Company	\co1\	\co2\	\co3\	\co4\
Date	\dt\	\dt2\	\dt3\	\dt4\
Date Signed	\ds1\	\ds2\	\ds3\	\ds4\
Email Address	\em1\	\em2\	\em3\	\em4\
First Name	\fn1\	\fn2\	\fn3\	\fn4\
Full Name	\fna1\	\fna2\	\fna3\	\fna4\
Last Name	\ln1\	\ln2\	\ln3\	\ln4\
Note	\nt1\	\nt2\	\nt3\	\nt4\
Number	\no1\	\no2\	\no3\	\no4\
Radio Group	\rg1\	\rg2\	\rg3\	\rg4\
SSN	\sn1\	\sn2\	\sn3\	\sn4\
Text	\txt1\	\txt2\	\txt3\	\txt4\
Zip	\zi1\	\zi2\	\zi3\	\zi4\

For more information on tags and how they are displayed in documents, see Using Anchor Tags from the DocuSign site.

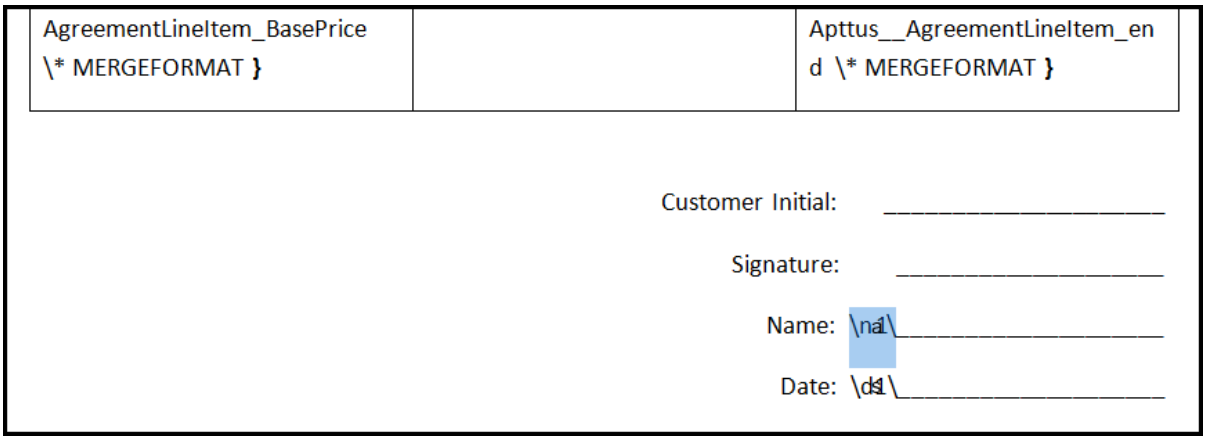
To configure templates to use DocuSign tags

1. Connect to X-Author Contracts and go the **X-Author Templates** tab.

2. Click **New** and create a new template or click **Check-Out** to open an existing template.
3. To include a marker in the template that will be used as a DocuSign tag when the document is generated, type in the desired text, per the *Tag Type* table.
4. To anchor a tag to a particular word, such as Employee ID or Employee name, add a tag to the agreement such as \employee.name\. Specify the same tag name in the Anchor field of a custom tag in DocuSign. For more information about specifying anchor tags, refer the DocuSign documents.
   For example, these tags (\in1\, \si1\, \na1\, \ds1\) are used below to include the *customer initials*, *signature*, *name*, and signing *date*.

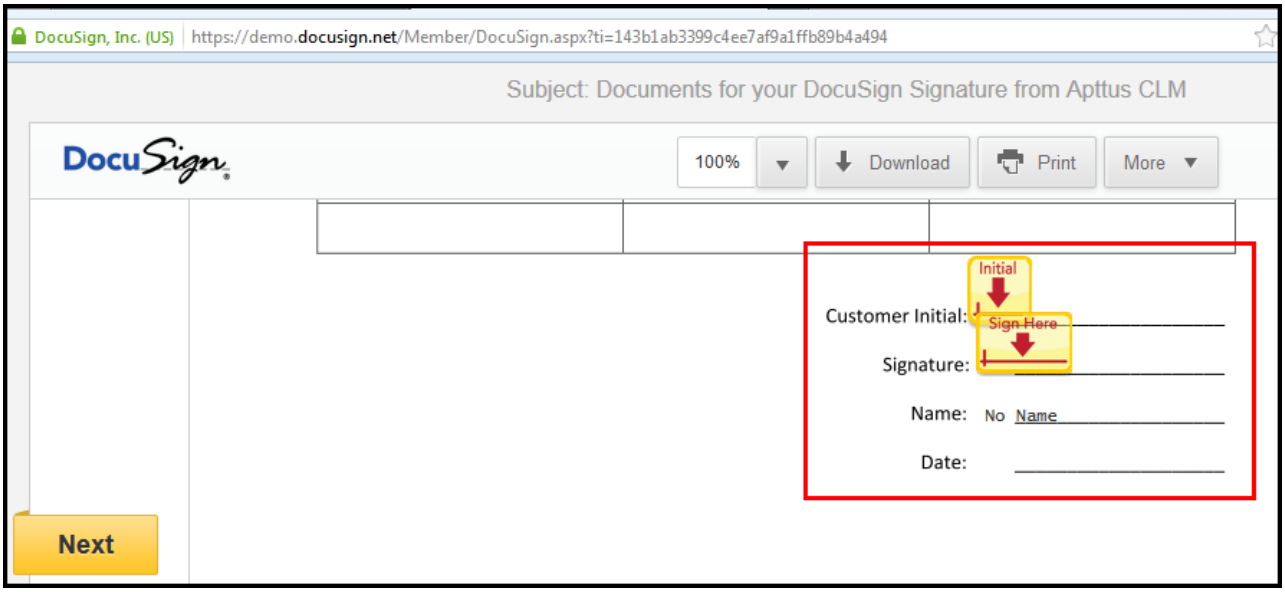


   After typing the tags, you should highlight them one at a time and change their font color to white or to the background color for the document. This ensures the characters used for the tags are not displayed in the generated document.



5. Finish editing the template as required and then click **Check-in** to have the template checked into Salesforce.

The template can now be used with agreements that will be sent for signature via DocuSign. When the document is opened — and the corresponding tags have been created in DocuSign — the tags will be displayed.



The template can also be used for standard documents you want to have manually signed. As long as you have made the tag characters white or the same as the background color, they will not show up in the document.

Loading DocuSign Templates into Apttus

DocuSign for Apttus now enables you to load the DocuSign Templates into Apttus. When you send a document for eSignature, an envelope is created which contains your document and then it is sent to your recipients. Templates enable you to define how your envelope will look like when it is sent to your recipients. With Templates, you can pre-define the recipients, recipient roles, documents to be sent, the order of documents, email subject, email body, reminders, and expiration. The templates are then used to create the envelopes that are sent to your recipients. You can use the templates that you have created in DocuSign account, in Apttus as well. To enable Loading DocuSign Templates into Apttus, you must enable the DocuSign Templates Enabled custom setting. DocuSign Templates Enabled custom setting overrides Recipient Roles Enabled and Remove Recipient Ordering custom settings. For further information, refer to the use case below.

Use Case

The following table represents the possibilities and behavior of the custom settings pertaining to DocuSign Templates.

Scenario	DocuSign Templates Enabled checked?	Recipient Roles Enabled checked?	Remove Recipient Ordering checked?	Result
1	No	No	No	The user CANNOT add DocuSign Templates on the Additional Details page.The user CANNOT add or change the recipient roles. The user CANNOT reorder the recipients. Hence, the document is sent in the order in which the recipients are added.
2	No	No	Yes	The user CANNOT add DocuSign Templates on the Additional Details page.The user CANNOT add or change the recipient roles. The user CAN reorder the recipients. Hence, the document is sent in the order in which the recipients are reordered using the arrow buttons. And, the signer roles cannot be defined on Adding Recipients page.
3	No	Yes	Yes	The user CANNOT add DocuSign Templates on the Additional Details page.The user CAN add or change the recipient roles. The user CANNOT reorder the recipients. Hence, the document is sent in the

Scenario	DocuSign Templates Enabled checked?	Recipient Roles Enabled checked?	Remove Recipient Ordering checked?	Result
				order as defined in the Routing Order column. And, the signer roles can be defined on Adding Recipients page.
4	No	Yes	No	The user CANNOT add DocuSign Templates on the Additional Details page.The user CAN add or change the recipient roles. The user CANNOT reorder the recipients. Hence, the document is sent in the order as defined in the Routing Order column. And, the signer roles can be defined on Adding Recipients page.
5	Yes	No	No	The user CAN add DocuSign Templates on the Additional Details page. The user CANNOT add or change the recipient roles. The user CAN reorder the recipients. Hence, the document is sent in the order in which the recipients are reordered using the arrow buttons. And, the signer roles can be defined on Adding Recipients page.
6	Yes	No	Yes	The user CAN add DocuSign Templates on the Additional Details page. The user CANNOT add or change the recipient roles. The user CAN reorder the recipients. Hence,

Scenario	DocuSign Templates Enabled checked?	Recipient Roles Enabled checked?	Remove Recipient Ordering checked?	Result
				the document is sent in the order in which the recipients are reordered using the arrow buttons.And, the signer roles can be defined on Adding Recipients page.
7	Yes	Yes	No	The user CAN add DocuSign Templates on the Additional Details page. The user CANNOT add or change the recipient roles. The user CAN reorder the recipients. Hence, the document is sent in the order in which the recipients are reordered using the arrow buttons. And, the signer roles can be defined on Adding Recipients page.
8	Yes	Yes	Yes	The user CAN add DocuSign Templates on the Additional Details page. The user CANNOT add or change the recipient roles. The user CAN reorder the recipients. Hence, the document is sent in the order in which the recipients are reordered using the arrow buttons. And, the signer roles can be defined on Adding Recipients page.

NOTE: DocuSign Templates Enabled custom setting overrides Recipient Roles Enabled and Remove Recipient Ordering custom settings.

In order to sync the DocuSign Templates with Apttus, you can run a batch job. You must enable the Template Information Batch Job to sync your DocuSign Templates with Apttus.

To enable the batch job for templates

Go to **Setup > Develop > Visualforce Pages**.

1. Click letter **T** and Select **TemplateInformationBatchJobSetup** page.
2. Click **Preview**.

> **Note**
>
> Step 2 will schedule the batch job.

To ensure that you have scheduled the batch job, Go to **Setup > Administration > Monitoring > Scheduled Jobs**. You can view the **DocuSign Template Information Reader** under All Scheduled Jobs.

The above-mentioned batch job runs every hour.

The documents and recipients that you add in DocuSign Templates must be in accordance with Apttus. You must enter correct routing order at both places.

Adding Custom Fields to the Envelope

hen you send the documents for eSignature, you add custom DocuSign tags to the document. You can choose to set some initial values to the fields and also fetch the updated values if any from the fields in the template.

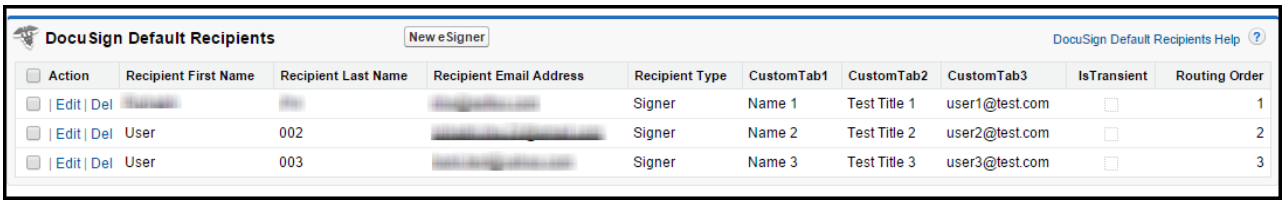
Use Case1:

Suppose the agreement or proposal is sent to multiple recipients for signature, you can add tags to fields for each specific signer. For signer 1, add tags for Name, and email and for signer 2 add tags for name, email and phone number.

Using the set Recipient Tabs API. you can set an initial value to a field in the generated document that is sent for signature. If the signer updates the field, you can fetch and update the field information to the account and other relevant objects in Salesforce using the get Recipient Tab APIs.

Use Case2:

Suppose the agreement or proposal is to be sent to three recipients for signature, and you want to obtain the information from the signers. We want to populate the fields such as Custom Tab1, Custom Tab2, and Custom Tab3 in our Salesforce org as shown in the image below. We are adding the custom tabs for the user to add their Name, Title and Email.



DocuSign Default Recipients | New eSigner | DocuSign Default Recipients Help

Action	Recipient First Name	Recipient Last Name	Recipient Email Address	Recipient Type	CustomTab1	CustomTab2	CustomTab3	IsTransient	Routing Order
| Edit | Del	[illegible]	[illegible]	[illegible]	Signer	Name 1	Test Title 1	user1@test.com		1
| Edit | Del	User	002	[illegible]	Signer	Name 2	Test Title 2	user2@test.com		2
| Edit | Del	User	003	[illegible]	Signer	Name 3	Test Title 3	user3@test.com		3

You require a template that you want to send to your signers and you have to add tags to fields for each signer. The image below shows the template to be used.

Please input your Name here : \tx1\

Please input your Title here : \t1\

Please input your Email here : \e1\

\si1\

Please input your Name here : \tx2\

Please input your Title here : \t2\

Please input your Email here : \e2\

\si2\

Please input your Name here : \tx3\

Please input your Title here : \t3\

Please input your Email here : \e3\

\si3\

After signer1 enters his Name and Title, and signs the document, it is sent to signer 2. After signer 2 enters his Name and Title, and signs the document, it is sent to signer 3. After signer 3 signs the document, it is sent back to the sender. The Name and Title are the custom tabs and are populated in the Salesforce once batch job is run.

Perform the following steps to achieve this scenario.

1. Add Custom Fields to the DocuSign Recipients object.

2. Create the Custom Tags in DocuSign account.

3. Create the Template with the appropriate Custom Tags.

4. Add the classes under Apex Classes.

5. Ensure that **DocuSign Custom Classes** in System Properties has the callback class names populated with appropriate class names.

6. Ensure that **Recipient Tabs Enabled** check box in DocuSign System Properties is selected.

You can get a detailed description for all these steps in below sections.

To add custom fields

1. Go to **Setup > Build > Create > Objects** and select **DocuSign Recipients** (Object Name: DocuSignDefaultRecipient2 , API Name: Apttus_DocuApi__DocuSignDefaultRecipient2__c).
2. Under the Custom Fields & Relationships related list, click **New**.
3. Select **Text** radio button and click **Next**.
4. Enter Field Label as Custom Tab1. Field Name is auto-populated.
5. Enter the **Length** as 18.
6. Click **Next**.
7. Establish appropriate Field-Level Security.
8. Click **Next**.
9. Select appropriate page layouts to which you want to add this field.
10. Click **Save**.

Adding Apex Classes

You can set information to the signer fields using set Tabs for each Recipient and getTabs for each recipient. These APIs enable you to set information in the document and also enable you to fetch the information set in these tags such as name, email, or company name. You can fetch the data the user enters in these fields and update records for an object such as Account, Contact, or Opportunity.

- API to Get Custom Tabs
  If you want to update the information about the signer in records after the recipient signs and sends the agreement across, use the getCustomTabs APIs

- **API to Set Custom Tabs**
  The setTabs API enables you to set initial values for certain fields in the Agreement. The value you set using the setTabs API is displayed on the envelope. Set the initial values using this API before you initiate the eSignature request.

To add apex class

1. Go to **Setup > Build > Develop > Apex Classes** and click **New**.
2. Paste the appropriate code.
3. Click **Save**.

API to Get Custom Tabs

If you want to update the information about the signer in records after the recipient signs and sends the agreement across, use the getCustomTabs APIs. getTabs for each Recipient: Enables you to retrieve the values set within input tags for a field in the contract when the request for eSignature is completed.

> **Note**
>
> We have customized the code as per Use Case 2. You can customize the code as per your business requirements.

The snippet below enables you to fetch and update the information of a signer:

```
/*
 * Sample class for demonstrating how to get the values from
DocuSign custom tags
 * and update the custom fields on DocuSign Default Recipient object
on an Apttus Agreement
*/
global class DocuSignEnvelopeGetRecipientTabs2Imp implements
Apttus_DocuApi.IDocuSignEnvelopeGetRecipientTabs2{
    global DocuSignEnvelopeGetRecipientTabs2Imp(){

    }
    global void getRecipientTabs(List<Apttus_DocuApi.
GetRecipientTabsWrapper> iListGetRecipientTabsWrapper){
```

```
        Set<ID> setParentId = new Set<ID>();
        for(Apttus_DocuApi.GetRecipientTabsWrapper
objGetRecipientTabsWrapper : iListGetRecipientTabsWrapper){
            try{
                ID parentId = ID.valueOf(objGetRecipientTabsWrapper.
parentId);
                if(!setParentId.contains(parentId)){
                    setParentId.add(parentId);
                }
            }catch(Exception ex){
                System.debug('ERROR :  it is DEMO...!');
            }
        }

        List <Apttus_DocuApi__DocuSignDefaultRecipient2__c>
listRecipients = [SELECT Apttus_CMDSign__AgreementId__c,
Apttus_DocuApi__ReadOnlyEmail__c,Apttus_DocuApi__SigningOrder__c,
CustomTab1__c,CustomTab2__c,CustomTab3__c  from
Apttus_DocuApi__DocuSignDefaultRecipient2__c  where
Apttus_CMDSign__AgreementId__c  in :setParentId];
        Map <String,Apttus_DocuApi__DocuSignDefaultRecipient2__c>
recipientMap = new Map <String,
Apttus_DocuApi__DocuSignDefaultRecipient2__c>();

        for(Apttus_DocuApi__DocuSignDefaultRecipient2__c r :
listRecipients){
            String strKey = r.Apttus_CMDSign__AgreementId__c +
String.valueOf(r.Apttus_DocuApi__SigningOrder__c);
            recipientMap.put(strKey,r);
        }
        List<Apttus_DocuApi__DocuSignDefaultRecipient2__c> toUpdate
= new List<Apttus_DocuApi__DocuSignDefaultRecipient2__c>();
        for(Apttus_DocuApi.GetRecipientTabsWrapper
objGetRecipientTabsWrapper : iListGetRecipientTabsWrapper)
{

             try{

                ID parentId = ID.valueOf(objGetRecipientTabsWrapper.
parentId);

                System.debug(System.LoggingLevel.ERROR, 'Parent Id
== > '+parentId);
                Apttus_DocuApi__DocuSignDefaultRecipient2__c
docuSignDefaultRecipient = null;
```

```
                System.debug(System.LoggingLevel.ERROR, 'Step 001 ==
>');

                Apttus_DocuApi.DocuSignUtil2.DocuSignRecipientStatus
objRecipeintStatus = objGetRecipientTabsWrapper.recipientStatus;
                System.debug(System.LoggingLevel.ERROR, 'Step 001.1
== >');

                String strKey = parentId + objRecipeintStatus.
routingOrder;

                Apttus_DocuApi.DocuSignUtil2.RecipientTabs rTabs =
objRecipeintStatus.tabs;

                //check if the recipient tab has text tabs

                System.debug('Map values == > '+JSON.serialize
(recipientMap));

                if(recipientMap.containsKey(strKey)){
                    System.debug('Getting Map values for Id == > '+st
rKey);
                    docuSignDefaultRecipient = recipientMap.get
(strKey);
                }
                if(rTabs.textTabs.size() > 0){
                    //populate the first custom field with the data
in the first text tab
                    Apttus_DocuApi.DocuSignUtil2.textTab tTab =
rTabs.textTabs[0];
                    docuSignDefaultRecipient.CustomTab1__c = String.
ValueOf(tTab.value);

                    //populate the second custom field with the data
in the second text tab
                    Apttus_DocuApi.DocuSignUtil2.textTab tTab1 =
rTabs.textTabs[1];
                    docuSignDefaultRecipient.CustomTab2__c = String.
ValueOf(tTab1.value);
                }

                //check if the recipient tab has email tabs
                if(rTabs.emailTabs.size() > 0){
                    //populate the third custom field with the data
in the first email tab
                    Apttus_DocuApi.DocuSignUtil2.emailTab eTab =
rTabs.emailTabs[0];
```

```
                        docuSignDefaultRecipient.CustomTab3__c = String.
ValueOf(eTab.value);

                    }

                    toUpdate.add(docuSignDefaultRecipient);
                } catch(Exception ex){
                    System.debug('ERROR AT the :'+ex.getMessage());
                }
            } // for

            if(toUpdate.size() > 0){
                update toUpdate;
                System.debug('ERROR: UPDATE DocuSignDefaultRecipient: '+t
oUpdate.size());
            }  else{
                System.debug('ERROR: UPDATE DocuSignDefaultRecipient: '+t
oUpdate.size());
            }
        }
}
```

API to Set Custom Tabs

The setTabs API enables you to set initial values for certain fields in the Agreement. The value you set using the setTabs API is displayed on the envelope. Set the initial values using this API before you initiate the eSignature request.

set Tabs for each Recipient: Provides an initial set of corresponding values for each tag type for a recipient when the request is sent to DocuSign. These are the initial values that are viewable and editable in the document you send to the signer for signature.

Before using the APIs ensure the following:

- Ensure that the DocuSign Custom Classes with the field Add Recipient Tabs Callback Classispopulatedwith the callback class name, DocuSignEnvelopeSetRecipientTabs2Imp.
- Ensure that you select theRecipientTabs Enabled checkbox under the DocuSign System Properties.
- In the custom callback class, set the value and the anchor string for the custom tag, getRecipientTabsmethodiswherewe set the value and the anchor string for the custom tag that we want to prepopulate.

In the Custom Callback class, the getRecipientTabs method is where you set the value and the anchor string for the custom tag that you want to prepopulate. So, if you want to populate a text tab with some value, you should initialize the text tab in the getRecipientTabs method such as Apttus_DocuApi.DocuSignUtil.textTab objTextTab = new Apttus_DocuApi.DocuSignUtil.textTab (iRecipientId,'This Value','40','0','0'.The second parameter is the value that you need to set for the custom text tag, so for above example, the text tag has a value - 'This Value', when it shows up in DocuSign. You can set it to a dynamic value by pulling up any field through SOQL using the parentId. Then, while setting the anchor string for the tag, you can define what anchor stringy ou are going to use in the template. Suppose you want to use \t {r}\anchortag, this is what you put in the custom class- objTextTab.anchorString = '\\t'+iRecipientId; objRecipientTabs.addTextTab (objTextTab). You then need to use the tag \t1\, \t2\ in the document that you are sending for signature, and you need to have the tag \t{r} \ defined under the DocuSign account under custom tags.

Note

We have customized the code as per UseCase 2. You can customize the code below as per your business requirements.

The snippet below enables you to set default values for DocuSign tags.

```
/*
 * Sample class for demonstarting how to set the default values for
DocuSign tags
*/
global class DocuSignEnvelopeSetRecipientTabs2Imp implements
Apttus_DocuApi.IDocuSignEnvelopeSetRecipientTabs2{

    global List<Apttus_DocuApi.SetRecipientTabsWrapper>
listToSetRecipientTabsWrapper = new List<Apttus_DocuApi.
SetRecipientTabsWrapper>();
    global List<Apttus_DocuApi.SetRecipientTabsWrapper>
setRecipientTabs(List<Apttus_DocuApi.SetRecipientTabsWrapper>
iListSetRecipientTabsWrapper){
        System.debug(System.LoggingLevel.ERROR, 'SETTER : Sep 001 ');
        this.listToSetRecipientTabsWrapper =
iListSetRecipientTabsWrapper;

        for(Integer counter = 0 ; counter <
listToSetRecipientTabsWrapper.size(); counter++){
```

```
            Apttus_DocuApi.SetRecipientTabsWrapper
objSetRecipientTabsWrapper = this.listToSetRecipientTabsWrapper.get
(counter);
            this.listToSetRecipientTabsWrapper[counter] = this.
addRecipeintTabs(objSetRecipientTabsWrapper);
        }
        System.debug(System.LoggingLevel.ERROR, 'SETTER : Sep 002 ');
        return listToSetRecipientTabsWrapper;
    }

    public Apttus_DocuApi.SetRecipientTabsWrapper addRecipeintTabs
(Apttus_DocuApi.SetRecipientTabsWrapper iSetRecipientTabsWrapper){

        System.debug(System.LoggingLevel.ERROR, 'SETTER : Sep 003 ');
        List<Apttus_DocuApi.DocuSignUtil.Recipient> listRecipient =
iSetRecipientTabsWrapper.listRecipient;
        String parentId = iSetRecipientTabsWrapper.parentId;

        for(Integer counter = 0 ; counter < listRecipient.size();
counter++){

            Apttus_DocuApi.DocuSignUtil.Recipient objRecipient =
listRecipient.get(counter);

            listRecipient[counter] = this.addRecipeintTab
(objRecipient);
        }
        System.debug(System.LoggingLevel.ERROR, 'SETTER : Sep 004 ');
        iSetRecipientTabsWrapper.listRecipient = listRecipient;
        return iSetRecipientTabsWrapper;
    }

    public Apttus_DocuApi.DocuSignUtil.Recipient addRecipeintTab
(Apttus_DocuApi.DocuSignUtil.Recipient iRecipient){
        Apttus_DocuApi.DocuSignUtil.Recipient objRecipient =
iRecipient;
        System.debug(System.LoggingLevel.ERROR, 'SETTER : Sep 005 ');
        objRecipient.tabs =  getRecipientTabs(String.ValueOf
(objRecipient.objectIndex+1));

        return objRecipient;
    }


    public Apttus_DocuApi.DocuSignUtil.RecipientTabs getRecipientTabs
(String iRecipientId){
```

```
        System.debug(System.LoggingLevel.ERROR, 'SETTER : Sep 006 ');
        Apttus_DocuApi.DocuSignUtil.RecipientTabs objRecipientTabs =
new Apttus_DocuApi.DocuSignUtil.RecipientTabs();

        //Set values for two text tags and one email tag in the
document

        Apttus_DocuApi.DocuSignUtil.emailTab objEmailTab  = new
Apttus_DocuApi.DocuSignUtil.emailTab(iRecipientId,'email'+iRecipientI
d+'@test.com','40','0','0');
        Apttus_DocuApi.DocuSignUtil.textTab objTextTab = new
Apttus_DocuApi.DocuSignUtil.textTab(iRecipientId,'text'+iRecipientId,
'40','0','0');
        Apttus_DocuApi.DocuSignUtil.textTab objTextTab1  = new
Apttus_DocuApi.DocuSignUtil.textTab(iRecipientId,'title'+iRecipientId
,'40','0','0');


        objEmailTab.name = 'Email'+iRecipientId;
        objEmailTab.tabLabel = 'Email'+iRecipientId;
        objEmailTab.anchorString = '\\e'+iRecipientId+'\\';

        objTextTab.name = 'Text'+iRecipientId;
        objTextTab.tabLabel = 'Text'+iRecipientId;
        objTextTab.anchorString = '\\tx'+iRecipientId+'\\';

        objTextTab1.name = 'SecondText'+iRecipientId;
        objTextTab1.tabLabel = 'SecondText'+iRecipientId;
        objTextTab1.anchorString = '\\t'+iRecipientId+'\\';

        objRecipientTabs.addEmailTab(objEmailTab);
        objRecipientTabs.addTextTab(objTextTab);
        objRecipientTabs.addTextTab(objTextTab1);

        System.debug(System.LoggingLevel.ERROR, 'SETTER : Sep 007 ');
        return objRecipientTabs;

    }
}
```

Configuring Signer Roles

Signer Roles enables the users to make the tagging order explicit. **Tagging order** is the order in which the signer tags of recipient will appear on the document to be signed by the signers. The users can select the recipient role name while adding a recipient. This feature is helpful when you have added recipients in a random order but you want to change the tagging order. You can change the routing order in Routing Order column. However, to change the tagging order, you must select the Role Name accordingly.

For example, you add three users - Sam Cooper, Mike Hanks, and Rex Klenney - in the same order as mentioned. Now, you want the signing tag of Rex Klenney to be on top of all signers, Sam Cooper's tag to be second, and Mike Hanks as third. For Rex Klenney, select Signer 1; for Sam Cooper, select Signer 2; and for Mike Hanks, select Signer 3. Now, in the document to be signed, the tags will be in the order as Rex Klenney, Sam Cooper, and Mike Hanks.

With Signer Roles, you can skip the signing tags as well. This feature can be utilized when you have a standard document with standard number of tags and you want to skip a signer. For example, there are three departments and you have a standard document and signer tags - one for each department - HR, Finance, and Legal. For that document, you want signatures from HR and Legal only, you can skip Signer 2 (Finance).

To utilize explicit tagging order, you must enable **Recipient Roles Enabled** check box in System Properties. You can configure the Recipient Role Names and add new Recipient Role Names as well.

In implicit tagging order, the row that the recipient shows up on the Add Recipient user interface defines the tagging order - the recipient at row 1 will sign at the first signing tag, recipient at row 2 will sign at the second signing tag, and so on. Users can however move the recipients up and down using the arrows on the Add Recipient user interface, and thus re-arrange the tagging order.

For example, you add three users - Sam Cooper, Mike Hanks, and Rex Klenney - in the same order as mentioned. Now, you want the signing tag of Rex Klenney to be on top of all signers, Sam Cooper's tag to be second, and Mike Hanks as third. Now, using the order buttons, you can position Rex Klenney as first, Sam Cooper as second, and Mike Hanks as third. Now, in the document to be signed, the tags will be in the order as Rex Klenney, Sam Cooper, and Mike Hanks.

To utilize implicit tagging order, you must disable **Recipient Roles Enabled** check box in System Properties.

Note

- If you have added multiple recipients with the same signer role, and you have enabled Free Form Signing in DocuSign System Properties, then the first user can sign on the tag and others will use free form signing.
- If free form signing is not enabled, and recipients have the same role, an exception message is displayed.

Apttus highly recommends you to test the Get/Set Custom tab/tag values feature and ensure that custom class logic works as per your use case with Recipient Roles enabled and make changes to Get/Set classes, if needed.

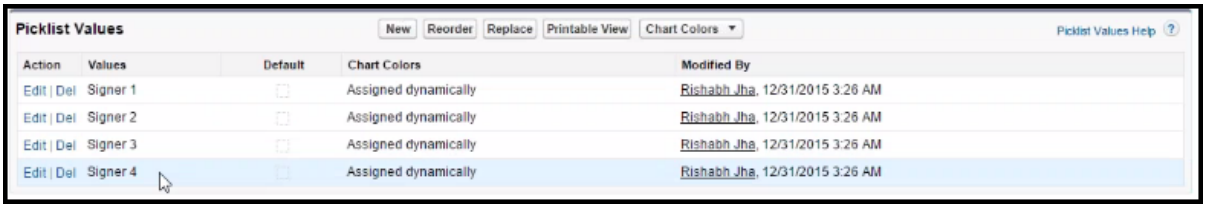
Scenario	Implicit Tagging Order	Explicit Tagging Order
Recipient Roles Enabled custom setting	Disabled	Enabled
Visibility of Order buttons	Order buttons are visible	Order buttons are not visible
Visibility of Routing Order column	Routing Order Column is visible	Routing Order Column is visible
Visibility of Role Name column	Signer Roles column is not visible	Signer Roles column is visible
Tagging order of recipients	Tagging order of recipients can be re-arranged using the order buttons	Tagging order of recipients can be re-arranged using the Signer Roles column

To enable recipient role names

1. Go to **Setup > Build > Develop > Custom Settings** and click **Manage** for DocuSign System Properties.
2. Click **Edit** for System Properties.
3. Select **Recipient Role Names Enabled** check box.
4. Click **Save**.

To add a recipient role name

1. Go to **Setup > Build > Create > Objects** and select **DocuSign Recipients**.
2. Under Custom Fields & Relationships, select **Role Name**.
3. Under Picklist Values, click **New**.
4. Enter the **Values** as Signer 1, Signer 2, Signer 3, and Signer 4 of recipient role name. You can add the values as per your business case.
5. Select the **Record Types** for which you want to enables these values.
6. Click **Save**.



Configuring Signer Groups

Signer Groups enables the admins to create a group of multiple users which can be used as recipients. The document can then be sent to the entire group for signing. Any one member from the group can sign the document with his signature. The signing tags are not assigned to any particular member, but they can still sign the document. The activities are tracked in the envelope history and certificate.

For example, you have three recipients for a document. Sam Cooper, Finance Department (signing group), and Rex Klenney. The document will first be sent to Sam Cooper. After he signs, the document is sent to Finance Department signing group. Any one user from the signing group can sign the document. Jon Hacks, a member of Finance Department signing group, signs the document. It will be then sent to Rex Klenney for signing. This will complete the envelope.

You must perform following steps to enable Signing Groups in your org.

- Create Signing Groups in your DocuSign account
- Sync the Signing Groups in Salesforce Org

You can add members to your existing Signing Groups. Only Administrative Users can perform this action. You can not create or delete Signer Groups using Apttus connector. Creation and deletion of Signer Groups must be done from your DocuSign account. Email Id of a user is unique for each user. Hence, if you try to update an Email-Id of a user, a new user is created.

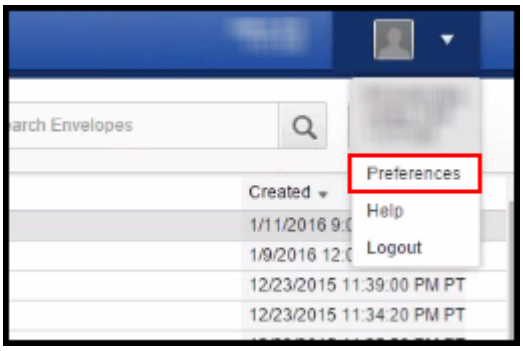
- Adding members to existing Signing Groups

You can remove the members from a Signing Group using DocuSign for Apttus connector. You can search for a user and remove him from existing signing group. You can not create or delete Signer Groups using Apttus connector. Creation and deletion of Signer Groups must be done from your DocuSign account.

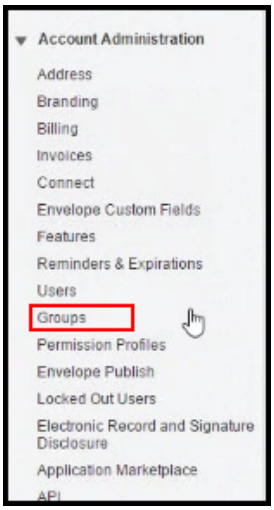
- Removing members from existing Signing Groups

To create a signer group in your DocuSign account

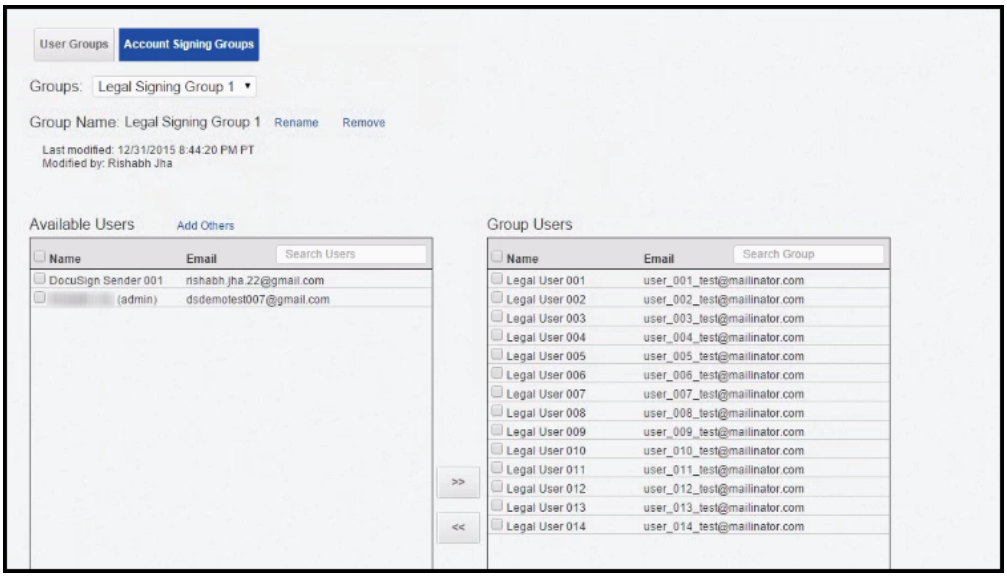
1. Log in to your DocuSign account.
2. Click the user menu and select **Preferences**.



3. Under Account Administration, click **Groups**.



4. Click the **Account Signing Groups** tab.
5. From the Groups picklist, select **New Group** to create a new signing group.
   -or-
   If you have existing singing group, then select the group that you want to add users to.
6. Enter the **Signing Group Name**.
7. If you want to add new users to your existing group, click **Add Others**.
8. Enter the **Name** and **Email Address**.
9. Click >> to add the user to the selected signing group.



10. Click **Save**.

To sync Signing Groups in your Salesforce org

1. Log in to your Salessforce org.
2. Click the **DocuSign Configuraiton Home** tab.
3. Click the **Signing Groups** tab.

> **Note**
>
> Your DocuSign Account ID is displayed. Verify it is your account.

4. From **Signing Group Users** picklist menu, select the signing group that you want to add.
5. Click **Sync With DocuSign**.

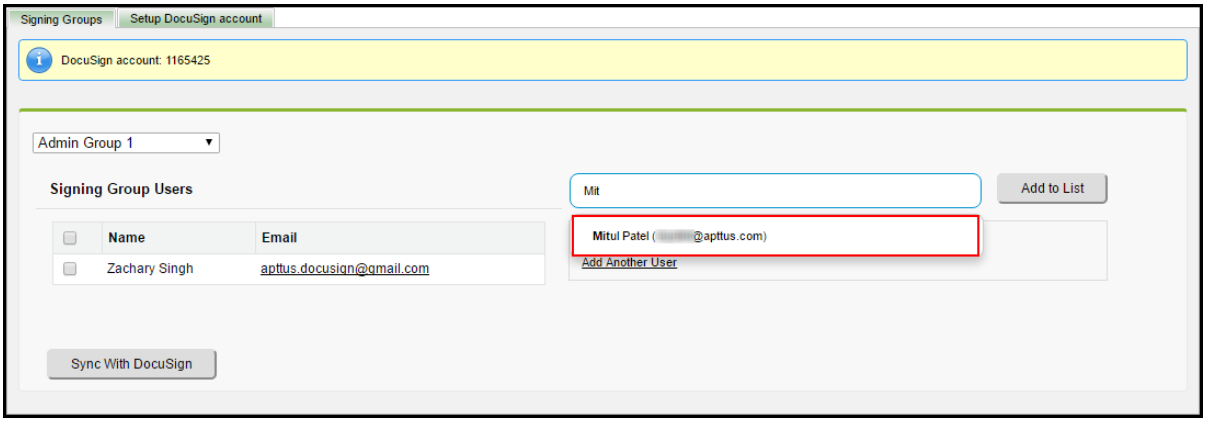
> **Note**
>
> You must perform this step every time you modify your Signing Group.

To add a member in existing signer group

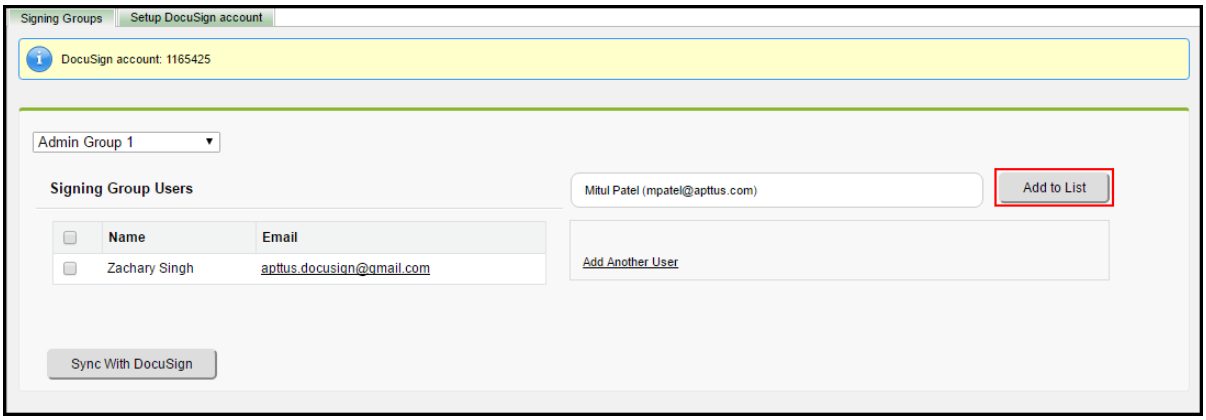
You must have an existing Signer Group in your DocuSign Account.

1. Login to your Salesforce org.
2. Click the **DocuSign Configuration Home** tab.
3. Click the **Signing Groups** tab.
4. Click **Sync Wth DocuSign**. Apttus recommends you to sync the DocuSign account with Apttus connector before you add or remove a member to your Signer Group.
5. Select the Signing Group, from the **Select Signing Group** picklist menu, that you want to edit.

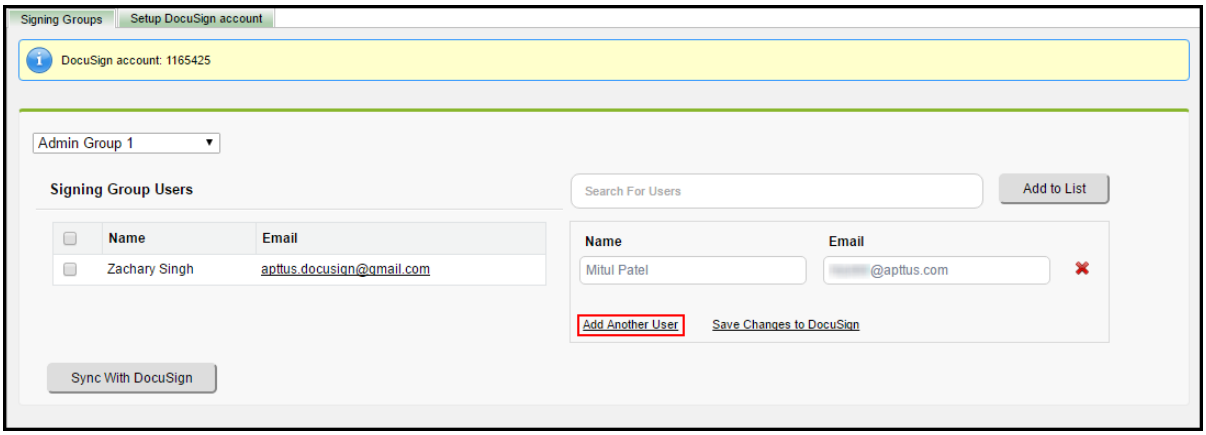
6. To add an existing user to a signing group, type the name of the user in Search for Users search-box.



7. Click **Add to List**.



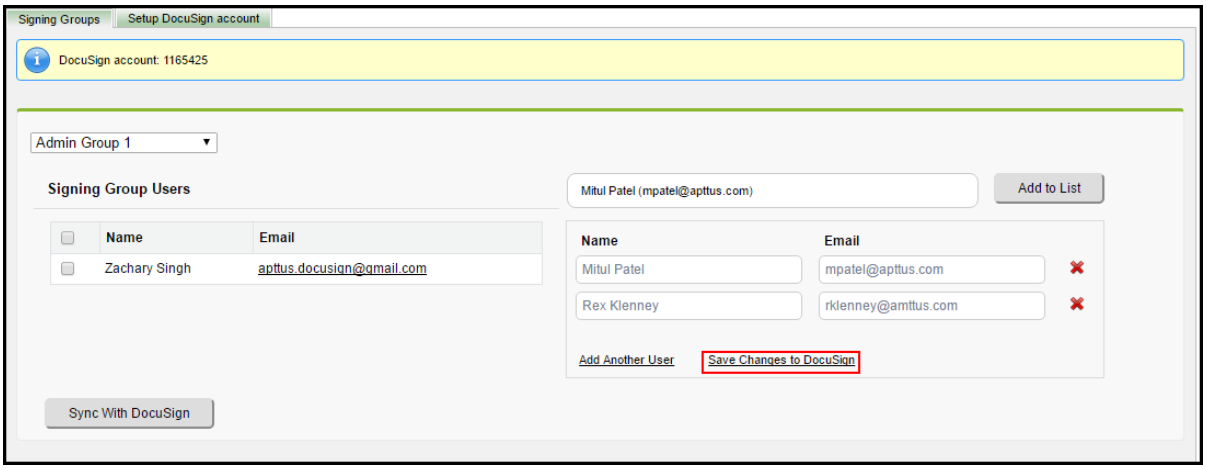
8. To add a new user, click **Add Another User**.



9. Enter the **Name** and **Email** of the new user. Email Id is a unique field in Signing Group. You can not update the Email Id. If you try to edit an email address of a user, a new user is created. In case you add an incorrect email-id, you must remove the user from the singing group itself. However, you can edit the name of a user.

> **Note**
>
> You can add multiple users at a time, before you click Save Changes to DocuSign.

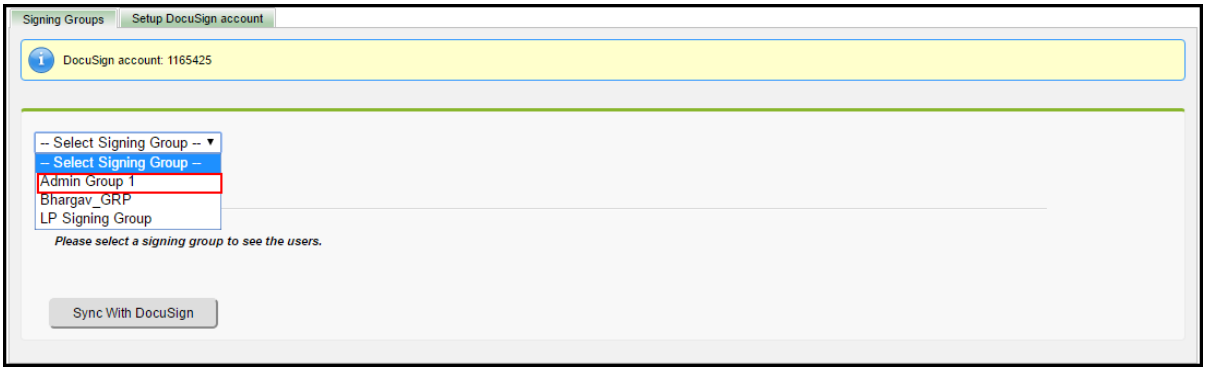
10. Click **Save Changes to DocuSign**.



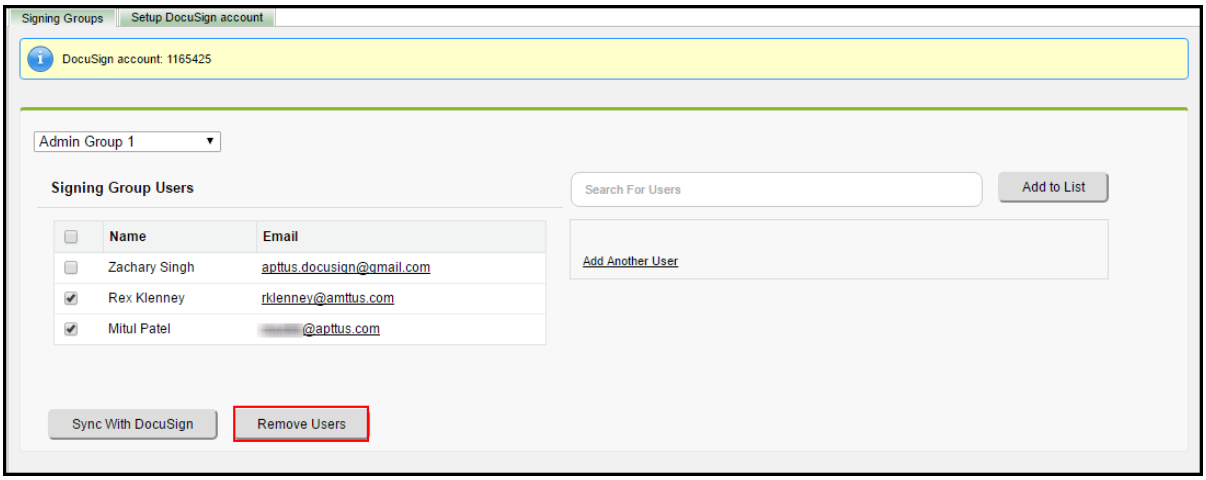
To remove a member from existing signer group

You must have an existing Signer Group in your Docusign Account.

1. Login to your Salesforce org.
2. Click the **DocuSign Configuration Home** tab.
3. Click the **Signing Groups** tab.
4. Click **Sync Wth DocuSign**. Apttus recommends you to sync the DocuSign account with Apttus connector before you add or remove a member to your Signer Group.
5. Select the Signing Group, from the **Select Signing Group** picklist menu, that you want to edit.



6. Select the user(s) whom you want to remove.
7. Click **Remove Users**.



Configuring Reminders and Expiration

Reminders and Expiration enables you, as an Administrative User, to set default validity and frequency of eSignature request. Default values for reminders and expiration are taken from the DocuSign account itself, which can be overwritten to custom values, and can be set so that no one can edit them. To prevent the users from overriding the existing values, you must select **Use DocuSign Default Reminders** check box in System Properties. The reminders and expiration can be set from both Apttus Connector and DocuSign account. For a clear understanding of the reminders and expiration, refer to the Use case below.

Note

If you, as a System Administrator, set the values as default Reminders and Expiration in DocuSign account and have unchecked the Use Default Reminders & Expiration custom setting in System Properties; the users leave the values in Reminders and Expiration on the Additional Details page as blank, then the values that you have entered as default Reminders and Expiration in DocuSign account are used by the system.

DocuSign Account fields					**Additional Details section fields**		
Send Reminder in [] Days			**Warn of Expiration [] Day(s) prior**	**Do NOT allow users to override**		**Send a Reminder to signers []**	**Expire reques in [] da (s)**

DocuSign Account fields					Additional Details section fields		
	Expire /Void Envelope in [] Days	**Repeat every [] Day(s) until Complete**		**these settings checked?**	**Use Default Reminders & Expiration checked?**	**day(s) after receipt**	
10	30	2	5	Yes	Yes		

DocuSign Account fields					Additional Details section fields		
10	30	2	5	No	Yes		

DocuSign Account fields					Additional Details section fields		
10	30	2	5	Yes	No	10	30

DocuSign Account fields					Additional Details section fields		
10	30	2	5	No	No	5	180

DocuSign Account fields					Additional Details section fields		
					No	5	365

DocuSign Account fields					Additional Details section fields		
					Yes	0	0

DocuSign Account fields					Additional Details section fields		
10	30	2	5	No	No		

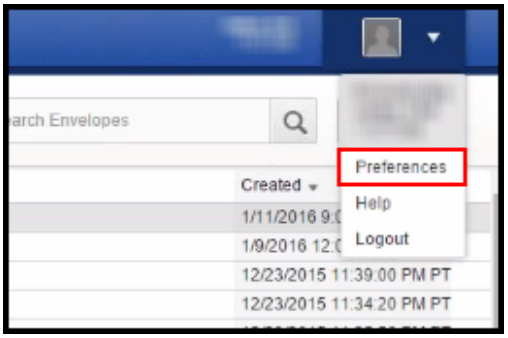
DocuSign Account fields					Additional Details section fields		

Note:

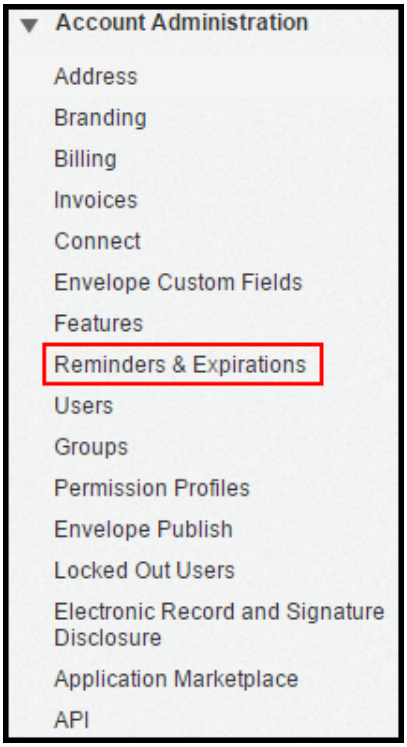
- If **Use Default Reminders & Expiration** checkbox is checked, the user will not be able to view the Reminders & Expiration fields at all.

To configure reminders and expiration in DocuSign account

1. Click the User Menu and select **Preferences**.



2. On the left-side panel, under Account Administration, click **Reminders & Expirations**. You can set account-level reminders and expiration of your documents from this page.

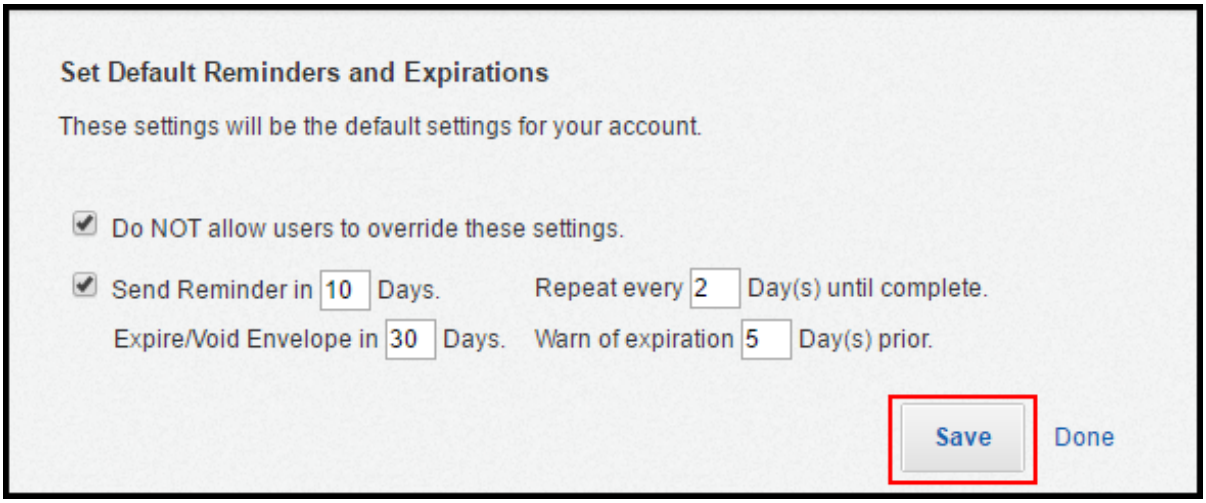


3. Under Set Default Reminders and Expirations section, select Send Reminder in [] Days check box and provide information as mentioned below.

Field	Description
Send Reminder in [] Days	Enter the number of days in which you want to send a reminder to sign the document after you send the document. For example, you send the document today and you enter the value as 5. A reminder will be sent to the signer after 5 days.
Expire /Void Envelope in [] Days	Enter the number of days in which you want the envelope to expire, after you send the document. For example, you send the docuemnt today and you enter the value as 365. The envelope will be valid for a year.

Field	Description
Repeat every [] Day(s) until complete	Enter the frequency of reminders in number of days for which you want to send the reminder until the document is signed. For example, you send the document today and you enter the value as 2. A reminder will be sent every 2 days until the signer signs the document.
Warn of expiration [] Day(s) prior	Enter the number of days before which you want to send a reminder about expiration of the document to be signed by the signer. For example, you send the document today and the validity of the document is for a year. Hence, a warning of expiration will be sent 10 days before expiration of the document.

4. Select **Do NOT allow users to override these settings** check box if you want to fix these settings as reminders and expiration.
5. Click **Save**.



The users can configure the Reminders and Expiration in Additional Section while sending the document for eSignature. For more information, refer to Adding Additional Details.

Configuring One-Click Send for Specific Envelopes

One-Click Send enables users to send an envelope for eSignature without needing to go through the various eSignature screens. You can directly send documents to default recipients or Primary Contacts with a single click without configuring additional attachments or recipients. You must have exactly one document in Notes and Attachments section and one recipient in DocuSign Recipients related list. However, **One-Click Send for Specific Envelopes** enables the users to enable One-Click Send feature for specific envelopes only. To enable this feature, One-Click Send check box in the System Properties must be disabled. Also, you must pass a parameter **&oneclick=true** in the URL with your envelope Id.

Note

Your users will be able to use this feature only if you have disabled One-Click Send system property in Custom Settings.

For detailed information, refer to the following usecase.

Usecase

One-Click Send check box enabled?	Value of &oneclick= parameter	Result
Yes		All documents will be sent using One-Click feature, if eligible.
No	true	The Document ID that you pass in the parameter will be sent using One-Click Send feature.

Note: If One-Click Send check box is enabled, the &oneclick= parameter is not checked by the system.

To disable one-click send feature check box

1. Go to **Setup > Build > Develop** and select **Custom Settings**.
2. Click **Manage** for DocuSign System Properties.
3. Click **Edit** for System Properties.
   -or-
   Click **Edit** for Comply System Properties if you are using Apttus DocuSign Contract Integration.
   -or-
   Click **Edit** for Proposal System Properties if you are using Apttus DocuSign Proposal Integration.
4. Deselect **One-Click Send** check box.
5. Click **Save**.

For more information on how to send specific documents with a single click, refer to Sending Specific Documents with Single-Click.

DocuSign for Apttus Objects

The following objects contain fields that are maintained in the corresponding tables for the objects.

DocuSign for Apttus Objects	Purpose of the Object
DocuSign Callout Transient	Temporary storage of system use object. It will not be used to store any data for end user consumption. System use only.
DocuSign Envelope	This is a generic template for Custom Object. With this template, you may adjust the default elements and values and add new elements and values.
DocuSign Envelope Recipient Status	DocuSign envelope recipient status
DocuSign Recipient	Holds the default recipients for e-signature.
DocuSign Signing Group	Stores the information about the DocuSign Signing Groups.
DocuSign Signing Group Member	Stores the information about the DocuSign Signing Group Members.
DocuSign User	This is a generic template for Custom Object. With this template, you may adjust the default elements and values and add new elements and values.

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