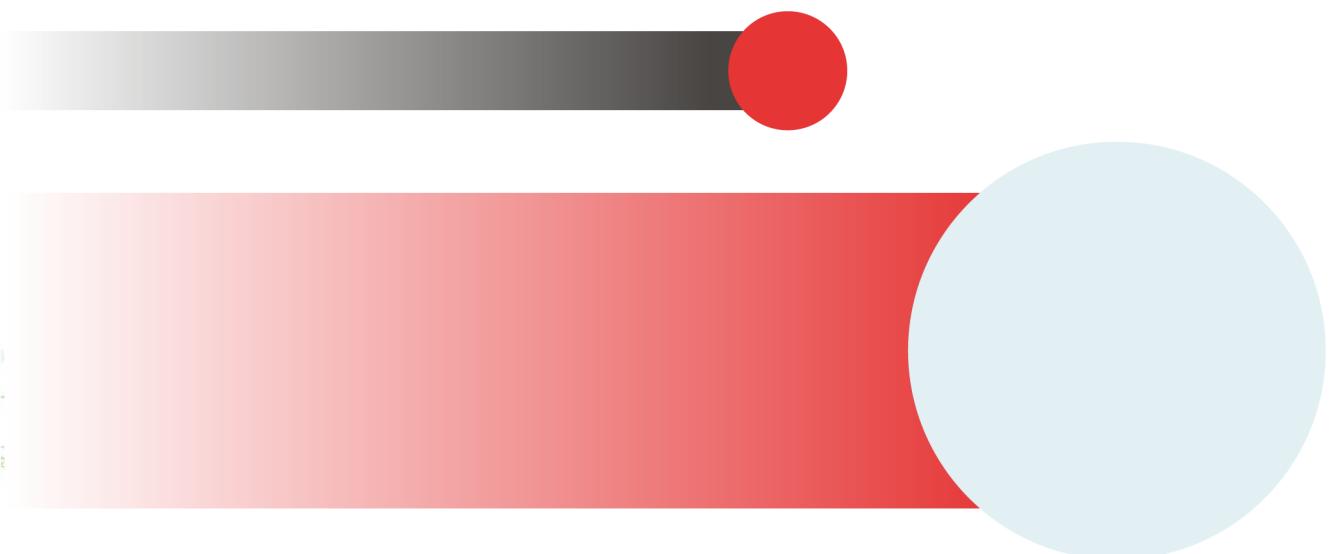




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# DocuSign for Apttus on Salesforce Spring 2020 Administrator Guide



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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 <a href="#">DocuSign for Apttus on Salesforce Release Notes</a> for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, refer to <a href="#">What's New</a> topic.
Other Resources	<ul style="list-style-type: none"><li>Contract Management User Guide: Refer to this guide to set-up the entire contract management process.</li><li>DocuSign for Apttus User Guide: Refer to this guide to set-up the entire DocuSign process.</li><li>X-Author User Guide: Refer to this guide for detailed instructions on setting up templates and editing agreement documents.</li></ul>

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 2020 Rev C	<a href="#">Upgrading DocuSign for Apttus</a>	Modified topic.
Spring 2020 Rev B	<a href="#">Frequently Asked Questions</a>	New topic.
	<a href="#">Settings</a>	Modified topic. Added Instance URL Remote Site Settings.
Spring 2020 Rev A	<a href="#">Pre-Installation Requirements</a>	Modified topic. Updated the topic to remove outdated screenshots and legacy content.
	<a href="#">Installing Apttus DocuSign</a>	Modified topic. Updated the legacy content.
	<a href="#">Settings</a>	Modified topic. Updated the topic for language and style changes.
	<a href="#">System Properties</a>	Renamed to <a href="#">DocuSign System Properties</a> . Updated the topic for language and style changes.
Spring 2020	<a href="#">Upgrading DocuSign for Apttus</a>	New topic. Contains information about upgrading from the previous two releases to the current release.
Winter 2019	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Summer 2019	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Spring 2019	<a href="#">DocuSign System Properties</a>	Modified topic. Updated the <b>RetrieveAsCombinedDocument</b> System Property.

Document	Topic	Description
Winter 2018	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Summer 2018	<a href="#">DocuSign System Properties</a>	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.

DocuSign for Apttus Adapter allows an administrator to perform the following administrative tasks:

- Configure DocuSign Tags
- Configure Templates
- Add Custom Fields to your envelope
- Configure Reminders and Expiration
- Configure One-Click Send

## Key Terminology

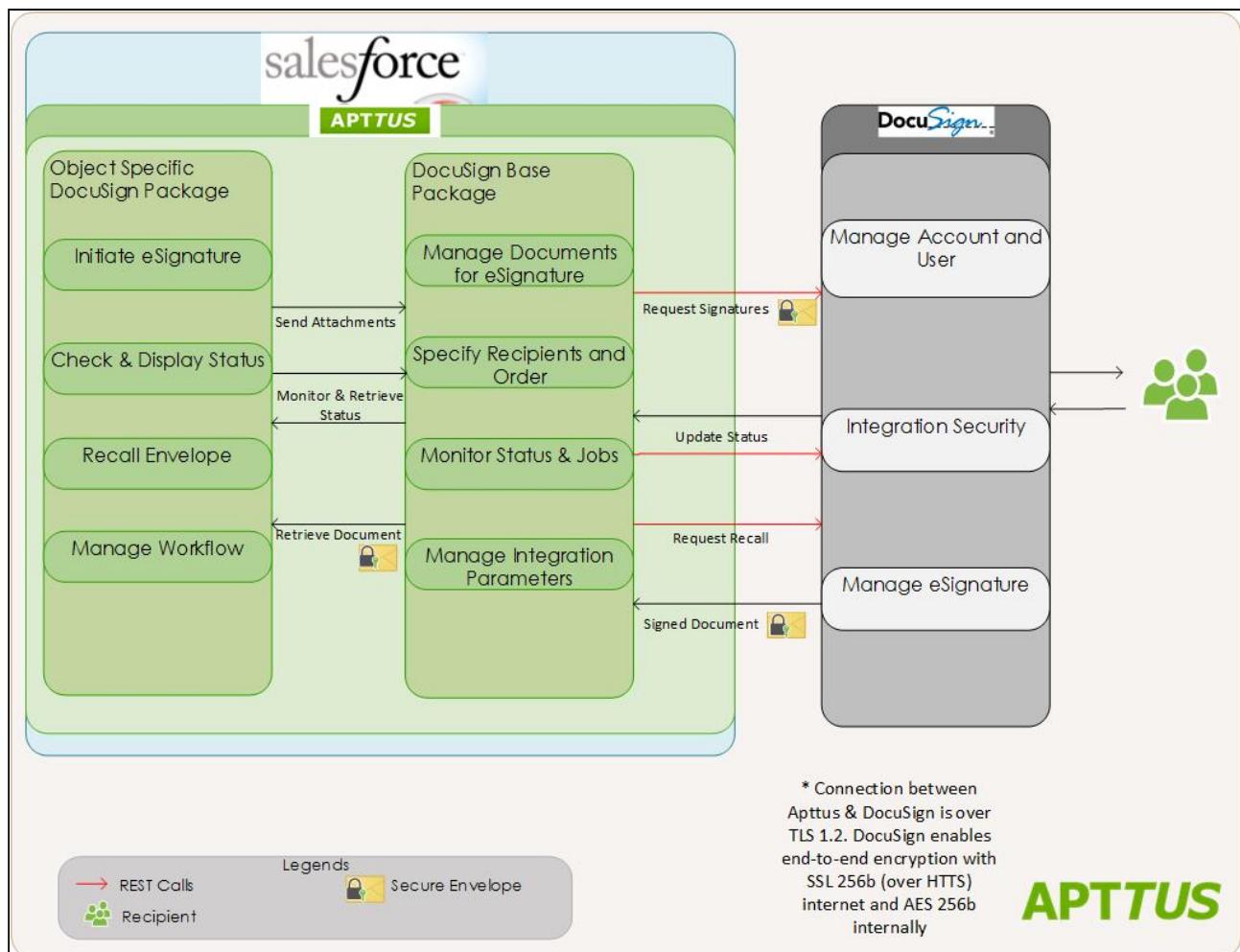
It is important to understand how terms are used when working with DocuSign for Apttus Adapter.

Term	Definition
Envelope	A container to send one or more documents for signature using the DocuSign system. Envelopes can contain multiple documents and can be sent to several recipients.
One Click Send	Enables users to send an envelope for eSignature without needing to go through the various eSignature screens. Users can directly send documents to default recipients or Primary Contacts with a single click without configuring additional attachments or recipients.
Reminders and Expiration	Enables the administrator to set the default validity and frequency of an eSignature request.
Tags	Locations in a document where the recipient needs to take action and provide information for the recipient.

# 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.

Topic	Description
<a href="#">Installing DocuSign for Apttus</a>	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.
<a href="#">Configuring DocuSign for Apttus</a>	This section includes information on creating templates for eSignature documents and creating tags in DocuSign.
<a href="#">DocuSign for Apttus Objects</a>	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

- [Upgrading DocuSign for Apttus](#)

The process for upgrading 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](#). 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 create a sandbox account.

- i 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. Ensure **Admin** Permission Profile is selected for your account in DocuSign.
3. Create another user associated with an Apttus User account under the Admin account.

- i These additional users must be in the same Salesforce org as the initial user, who was used to create the sandbox account.

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

## Installing Apttus DocuSign

Multiple packages must be installed to implement the complete DocuSign solution. Packages for DocuSign must be installed in the order indicated in the table in this section. You begin with the Apttus base packages and then install the integration packages that enable the various products to function together.

- i Apttus recommends downloading and upgrading Apttus packages in a Salesforce sandbox before installing them in your production environment. For information on installing and upgrading in a sandbox, please contact Apttus Support before you install any packages.

Install the packages in the following order.

Order	Package	Install Center tab to access the package	Required?
1	Apttus Contract Management	Contract Management	Y
2	Apttus Proposal Management	CPQ	Y
3	Apttus DocuSign API	Docusign Integration	Y
4	Apttus Contract DocuSign Integration	Docusign Integration	Y

Order	Package	Install Center tab to access the package	Required?
5	Apttus Quote DocuSign Integration	Docusign Integration	Y

- ⓘ You must have Apttus-provided login credentials to the Apttus Community Portal to be able to download packages.

## To install the Apttus DocuSign packages

1. Go to the **Resources > Install Center** tab on the Apttus Community Portal.
2. In **My Packages** navigation link, click **Docusign Integration**. From the VERSION dropdown, select the version that you want to install.
3. Click **Install Now**.
4. Select the environment in which you want to install the packages. Click **Install in Production** to install the packages in your production environment. Click **Install in Sandbox** to install the packages in your sandbox.
5. In the Salesforce login screen, enter your login credentials and click **Log In**.
6. Enter the Password provided by Apttus.
7. Select the profile for which you want to install the package. Apttus recommends that you select **Install for All Users**.
8. If you want to Install for Specific Profiles, you must define the access level for all profiles. Select from one of the following options.
  - No Access - This is the default setting. Apply this access level to disable all object permissions.
  - Full Access - Apply this access level to assign users permissions to Read, Create, Edit, Delete, View All, and Modify All for all objects.
9. Click **Set**.
10. Click **Install**.

A message is displayed indicating the installation is underway. Once installed, repeat this procedure for each of the packages.

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

# Upgrading DocuSign for Apttus

This section provides information on upgrading DocuSign for Apttus to the latest version from the previous two releases.

- ⓘ If you have not installed DocuSign for Apttus, you can contact Apttus Support to request for an installation link, then perform the standard installation as described in [Installing DocuSign for Apttus](#).

## Preparing for Upgrade

Before you upgrade to DocuSign for Apttus on Salesforce Spring 2020, you must ensure the following:

- You go through [DocuSign for Apttus on Salesforce Feature by Release](#) to know about the new features, enhancements, and deprecated features in DocuSign for Apttus since your existing release. After you upgrade DocuSign for Apttus to Spring 2020, you cannot roll back to any previous release.
- You have the [supported platforms and system requirements](#).
- You have access to the **Install Center** on the [Apttus Community Portal](#).
- You have administrator privileges to your Salesforce org

You need not back up your configurations. All configurations you performed since you installed your existing release will remain intact after the upgrade.

## Upgrading to DocuSign for Apttus on Salesforce Spring 2020

This section describes step-by-step instructions to upgrade from Winter 2019 and Summer 2019 to Spring 2020.

### Upgrading DocuSign for Apttus from Winter 2019 to Spring 2020

1. Go to **Setup > Installed Packages** and ensure that your current Salesforce org has the following Winter 2019 packages installed.

Product	Package Version (Name   Number)
Apttus Contract Management	10.2.0491   10.491
Apttus Proposal Management	7.0.0088   7.88
ApttusDocuSign API	5.2.0088   5.88
Apttus Contract DocuSign Integration	3.2.0038   3.38
Apttus Quote DocuSign Integration	2.0.0018   2.18

2. Ensure that you have the following packages and dependent packages to upgrade to Spring 2020. These packages are required to utilize the new features and enhancements of Spring 2020.

Product	Package Version (Name   Number)
Apttus Contract Management	11.0.0519   11.519
Apttus Proposal Management	9.2.0206   9.206
Apttus DocuSign API	6.0.0092   6.92
Apttus Contract DocuSign Integration	3.2.0038   3.38
Apttus Quote DocuSign Integration	2.0.0018   2.18

3. Perform the upgrade. The upgrade procedure is the same as the installation procedure. For detailed information on installing DocuSign for Apttus managed packages, see [Installing the DocuSign for Apttus Packages](#).

## Upgrading DocuSign for Apttus from Summer 2019 to Spring 2020

1. Go to **Setup > Installed Packages** and ensure that your current Salesforce org has the following Summer 2019 packages installed.

Product	Package Version (Name   Number)
Apttus Contract Management	10.0.465   10.465
Apttus Proposal Management	7.0.0088   7.88

Product	Package Version (Name   Number)
ApttusDocuSign API	4.0.85   4.85
Apttus Contract DocuSign Integration	2.0.0032   2.32
Apttus Quote DocuSign Integration	2.0.0018   2.18

2. Ensure that you have the following packages and dependent packages to upgrade to Spring 2020. These packages are required to utilize the new features and enhancements of Spring 2020.

Product	Package Version (Name   Number)
Apttus Contract Management	11.0.0519   11.519
Apttus Proposal Management	9.2.0206   9.206
Apttus DocuSign API	6.0.0092   6.92
Apttus Contract DocuSign Integration	3.2.0038   3.38
Apttus Quote DocuSign Integration	2.0.0018   2.18

3. Perform the upgrade. The upgrade procedure is the same as the installation procedure. For detailed information on installing DocuSign for Apttus managed packages, see [Installing the DocuSign for Apttus Packages](#).

## 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 with users who 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 Document	Default	Default	Default	Default
DocuSign Envelope Recipient	Default	Default	Default	Default
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

Custom Field Level Security	System Administrator	Sales User	Comply User	Legal
DocuSign Envelope	All fields enabled	All fields enabled	All fields enabled	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

<b>Custom Record Type Settings</b>		<b>System Administrator</b>		
DocuSign Account Configurations		NA		
DocuSign Callout Transients		NA		
DocuSign Envelopes		NA		
DocuSign Recipients		Signing Group, Contact (Default), Email, User		
<b>Custom Object Permissions</b>		<b>System Administrator</b>	<b>Sales User</b>	<b>Comply User</b>
DocuSign Account Configuration				
DocuSign Callout Transient	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Default Recipient (Deprecated)				
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, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Envelope Recipient Status	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Recipients				

Custom Object Permissions	System Administrator	Sales User	Comply User	Legal
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	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.

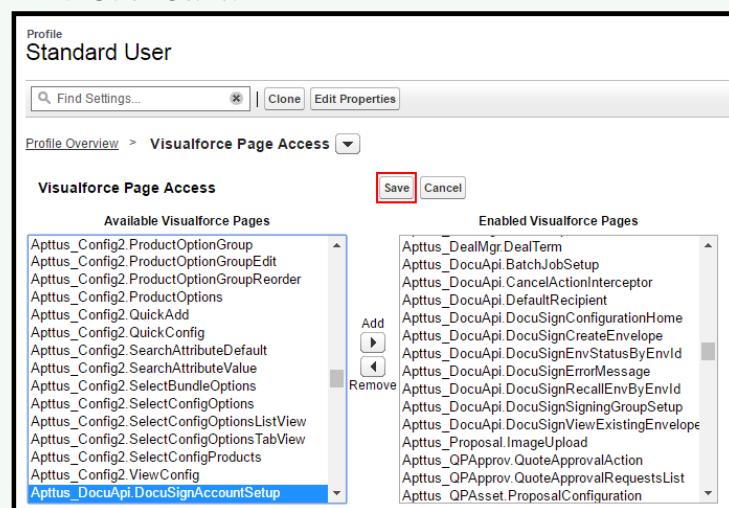
### To associate an Apttus user to DocuSign account

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:
- Go to Setup > Administer > Manage Users and select Profiles.
  - Select the profile for which you want to restrict the access.
  - Under the Apps section, select Visualforce Page Access.
  - Click Edit.
  - From Enabled Visualforce Pages, select DocuSign Account Setup and click .
  - 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 corresponding 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.**

- ⓘ 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 workflow 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.

- ⓘ 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
<b>Production Server Pod</b>	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 <b>Production Environment?</b> 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: <a href="https://&lt;instance-name&gt;.docusign.net/restapi/v2/">https://&lt;instance-name&gt;.docusign.net/restapi/v2/</a>
<b>Production Environment?</b>	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 > Security Controls > RemoteSiteSettings	
Remote Site Name	Remote Site URL
DemoDocuSign	<a href="https://demo.docusign.net">https://demo.docusign.net</a>
ProdDocuSign	<a href="https://www.docusign.net">https://www.docusign.net</a>
Instance URL	URL of your Salesforce instance

## 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

<b>MaxNumberOfSignerRole (Deprecated)</b>	This sets the maximum number of Signer role fields that will be available.
<b>RetrieveAsCombinedDocument</b>	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.
<b>In-Person Signers</b>	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 <i>Signer Type</i> 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 cannot 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

<b>Auto Select Recipient Field</b>	<p>Allows you to specify a contact field that will be used as default recipient for the eSignature.</p> <p>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.</p>	<p>If this option is selected, The default recipient from the contact field is displayed on the eSignature envelope.</p> <p>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.</p> <p>The Recipient's field becomes a read-only field once an eSignature request is initiated.</p> <p>When Auto-Select Attachment is not selected, the user is redirected to the Select Attachment screen.</p>
<b>Auto-Select multiple recipients?</b>	<p>Allows projects to specify a list of recipients that will have defaulted for the eSignature.</p> <p>To use this option, add DocuSign Recipients related list on the agreement or quote and specify the list for each agreement or quote.</p>	<p>If this option is selected, the default recipient from the DocuSign Recipients related list is fetched and populated on the eSignature envelope.</p> <p>If this option is not selected, you can select recipients when an eSignature request is initiated.</p>

<b>Auto-Select Attachment</b>	<p>This property allows you to auto-select the latest modified attachment from the parent document.</p>	<p>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.</p> <ul style="list-style-type: none"> <li>• If Auto-Select Recipient (one or multiple) is not selected, the user is redirected to the Select Recipient page.</li> </ul> <p><b>Specify the following validation message:</b></p> <ul style="list-style-type: none"> <li>• 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.</li> </ul> <p><b>Note:</b> This option is overridden by <b>Select First Document Default</b> setting in System Properties. The system will consider Select First Document Default setting first.</p>
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## DocuSign System Properties

The following managed properties are used throughout this document.

<b>App Setup &gt; Develop &gt; Custom Settings &gt; DocuSign System Properties &gt; System Properties</b>	
<b>Name</b>	<b>Description</b>
<b>Completed Envelope Sync Interval (Deprecated)</b>	A System setting to refresh data from DocuSign for a scheduled job in minutes on each hour. If more than one value is to be entered, must be comma separated values.

<b>DocuSign Envelope Status Subscriber</b>	Class names to be called by Envelope Status Sync job update extension objects.
<b>Production Server Pod</b>	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 <b>Production Environment?</b> 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: <a href="https://&lt;instance-name&gt;.docusign.net/restapi/v2/">https://&lt;instance-name&gt;.docusign.net/restapi/v2/</a>
<b>Email Body (Deprecated)</b>	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.
<b>Email Subject (Deprecated)</b>	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.
<b>Frequency to run check eSignature status (Deprecated)</b>	A System setting to refresh data from DocuSign for a 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.
<b>In-Person Signers</b>	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.
<b>MaxNumberOfSignerRole (Deprecated)</b>	This setting sets the maximum number of <i>Signer role</i> fields that will be available in the document to be sent for eSignature.
<b>Production Environment?</b>	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 <i>Production Server Pod</i> .

<b>Recipient Status Sync Interval (Deprecated)</b>	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.
<b>RetrieveAsCombinedDocument</b>	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. <div style="border: 1px solid #fca; padding: 10px; margin-top: 10px;"> <p><span style="color: #fca;">⚠</span> You can also combine documents based on the record type. To combine documents based on the record type, refer to <b>Admin Objects</b> topic in <i>Contract Management User Guide</i>.</p> </div>
<b>Select First Document Default</b>	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.
<b>Sort Document Descending</b>	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.
<b>Recipient Tabs Enabled</b>	Tabs are specific to each recipient and designated for each recipient. Selecting this checkbox enables the Recipient Tabs for recipient addition or subtraction.
<b>Add Attachments Enabled</b>	Selecting this check box enables you to add additional attachments to be sent to recipients when you navigate to a Contract or a Proposal and click Send for Signature.
<b>Add Recipients Enabled</b>	Selecting this check box enables the Add Recipients button when you navigate to a Contract or a Proposal and click Send for Signature. The recipients you add receive the documents for eSignature.  For more information on disabling recipient configuration, refer to <a href="#">FAQs</a> .

<b>Auto Provision User Enabled</b>	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.
<b>Send for Signature Enabled</b>	Selecting this check box enables the Send for eSignature button when you navigate to a Contract or a Proposal and click Send for Signature. Clicking this button sends the attached document to the specified recipients.
<b>View In DocuSign Enabled</b>	Selecting this check box enables the Finalize in DocuSign button when you navigate to a Contract or a 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.
<b>Http Timeout</b>	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 <a href="#">FAQs</a> .
<b>Include Certificate</b>	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 <a href="#">FAQs</a> .
<b>Edit Email Enabled</b>	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 the 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.
<b>Recipient Roles Enabled</b>	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.

<b>Remove Recipient Ordering</b>	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.  <b>Note:</b> When Recipient Roles Enabled check box is selected, Remove Recipient Ordering is ignored.
<b>Sync Apttus Created Envelopes Only</b>	Selecting this checkbox will sync only Apttus created Envelopes when you run a batch job.
<b>One-Click Send</b>	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 the Notes and Attachments section, and one recipient in DocuSign Recipients related list. When the user clicks <code>SendforeSignature</code> , the document in the Notes & Attachment section is sent to the default recipient.

<b>Profiles Enabled for Finalize</b>	<p>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.</p> <p>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.</p> <p>For example, if you have selected View in DocuSign Enabled checkbox 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.</p> <p>However, if you have selected View in DocuSign Enabled checkbox 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.</p> <div style="border: 1px solid #fca; padding: 10px; margin-top: 10px;"> <span style="color: #fca; font-size: 1.5em;">⚠</span> If you do not select <b>View in DocuSign Enabled</b>, Finalize in DocuSign button is not visible to any profiles marked as Profiles Enabled for Finalize.     </div>
<b>Profiles Enabled for Finalize 2</b>	<p>Comma-separated names of the user profiles that need to see the <b>Finalize in DocuSign</b> 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, <b>Profiles Enabled for Finalize</b>. This system property provides an additional 255 characters extending the total character count to <b>510 characters</b>.</p>

<b>Profiles Enabled for Finalize 3</b>	Comma-separated names of the user profiles that need to see the <b>Finalize in DocuSign</b> 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 by the system properties, <b>Profiles Enabled for Finalize</b> and <b>Profiles Enabled for Finalize 2</b> . This system property provides an additional 255 characters extending the total character count to <b>765 characters</b> .
<b>Use Default Reminders &amp; Expiration</b>	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.
<b>DocuSign Templates Enabled</b>	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.

<b>Profiles Enabled for Template Selection</b>	<p>You must have selected DocuSign Templates Enabled checkbox to use this custom setting.</p> <p>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.</p> <p>If you do not mention any profile names in this custom setting, all profiles are enabled for template selection.</p> <p>For example, System Administrator, Gold User, Standard User</p>
<b>DocuSign Batch Processing Disabled</b>	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
<b>Add Recipient Tabs Callback Class</b>	<p>Enter the name of the Callback class to be used for adding a recipient.</p> <p>For example, DocuSignEnvelopeSetRecipientTabs2Imp</p>
<b>Return Recipient Tabs Callback Class</b>	<p>Enter the name of the Callback class to be used for returning a recipient.</p> <p>For example, DocuSignEnvelopeGetRecipientTabs2Imp</p>

- ⓘ 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
<b>Name</b>	Enter <i>ProposalWorkflow</i> . For the quote integration to work as expected, this needs to be the value.

<b>DocuSign Envelope Status Subscriber</b>	Class names to be called by Envelope Status Sync job update extension objects.  For version 1.6 and higher, use the value <b>Apttus_QPDSign.QPDocuSignEnvelopeStatusSubscriber2</b> .  For versions 1.5 and lower use the value <b>Apttus_QPDSign.QPDocuSignEnvelopeStatusSubscriber</b> .
<b>App Setup &gt; Develop &gt; Custom Settings &gt; DocuSign System Properties &gt; Contract Management Workflow</b>	
<b>Name</b>	<b>Description</b>
<b>Name</b>	Enter <i>Contract Management Workflow</i> . For the agreement integration to work as expected, this needs to be the value.
<b>DocuSign Envelope Status Subscriber</b>	Class names to be called by Envelope Status Sync job update extension objects.  For versions 1.6 and higher, use the value <b>Apttus_CMDSign.CMDocuSignEnvelopeStatusSubscriber2</b> .  For versions 1.5 and lower, use the value <b>Apttus_CMDSign.CMDocuSignEnvelopeStatusSubscriber</b> .

## Comply System Properties

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

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

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

<b>Name</b>	<b>Description</b>

<b>Auto Select Attachment?</b>	<p>This property allows to auto-select latest modified attachment from the parent document.</p> <p>If set to true,</p> <p>The system will auto-select the latest modified document.</p> <p>The system will show the Read-Only selection on the Preview screen.</p> <ul style="list-style-type: none"> <li>• If Auto-Select Recipient (one or multiple) is not selected, the user is navigated to the Select Recipient page.</li> </ul> <p><b>Specify the following validation message:</b></p> <p>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 eSignature request".</p> <p><b>Note:</b> This option is overridden by <b>Select First Document Default</b> setting in System Properties. The system will consider Select First Document Default setting first.</p>
<b>Enable Document Preview in DocuSign App</b>	<p>Selecting this check box enables a preview of the document to be sent before you actually send the document out for eSignature.</p>
<b>Auto Select Recipient Field</b>	<p>If this option is selected,</p> <p>The default recipient from the contact field is displayed on the eSignature envelope.</p> <p>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 <i>Apttus_Proposal__Primary_Contact__c</i> or <i>Apttus__Primary_Contact__c</i> 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.</p> <p>The read-only list of recipients once an eSignature request is initiated.</p> <p>When Auto-Select Attachment is not selected, the user is redirected to the Select Attachment screen.</p> <p>If this option is not selected, you can select recipients when an eSignature request is initiated.'</p>

<b>Select Attachments from Related/Sibling</b>	Selecting this check box fetches the documents from the Notes & Attachments related list of all the related or sibling agreements.
<b>Auto-Select Multiple Recipients?</b>	<p>Selecting this checkbox allows you to specify a list of recipients that will be defaulted for the eSignature.</p> <p>To use this option, add DocuSign Recipients related list on the agreement or quote and specify the list for each agreement or quote.</p> <p>If this option is selected, the default recipient from the DocuSign Recipients related list is fetched and populated on the eSignature envelope.</p> <p>If this option is not selected, you can select recipients when an eSignature request is initiated.</p>
<b>eSignature Strict Mode</b>	For future release.
<b>One Click Send</b>	<p>Selecting this check box enables One Click Send feature to directly send the document foreSignatureusing just one click.</p> <p><b>Note:</b> To use this feature, there must be at least one attachment in the Notes &amp; Attachments related list and one contact in the DocuSign Recipient related list.</p>
<b>Filter RSPC By Primary Agreement Status</b>	Selecting this check box filters the documents from related, sibling, parent, and child agreements by Primary Agreement Status for the Add Attachments screen.
<b>Update RSPC Agreement Status</b>	Selecting this check box updates the Agreement Status of related, sibling, parent, and child agreements along with Primary Agreement Status.

<b>Select All Attachments</b>	<p>Selecting this checkbox will auto-select all the attachments on the Add Attachment page. This custom setting overrides the Select First Document Default custom setting.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p>
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## 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

<b>Auto Select Attachment?</b>	<p>This property allows to auto-select latest modified attachment from the parent document.</p> <p>If set to true,</p> <p>The system will auto-select the latest modified document.</p> <p>The system will show the Read-Only selection on the Preview screen.</p> <ul style="list-style-type: none"> <li>• If Auto-Select Recipient (one or multiple) is not selected, the user is navigated to the Select Recipient page.</li> </ul> <p><b>Specify the following validation message:</b></p> <p>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 eSignature request".</p> <p><b>Note:</b> This option is overridden by <b>Select First Document Default</b> setting in System Properties. The system will consider Select First Document Default setting first.</p>
<b>Enable Document Preview in DocuSign App</b>	<p>Selecting this check box enables a preview of the document to be sent before you actually send the document out for eSignature.</p>

<b>Auto Select Recipient Field</b>	<p>If this option is selected, The default recipient from the contact field is displayed on the eSignature envelope.</p> <p>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 <i>Apttus_Proposal__Primary_Contact__c</i> or <i>Apttus__Primary_Contact__c</i> 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.</p> <p>The read-only list of recipients once an eSignature request is initiated.</p> <p>When Auto-Select Attachment is not selected, the user is redirected to the Select Attachment screen.</p> <p>If this option is not selected, you can select recipients when an eSignature request is initiated.'</p>
<b>Select Attachments from Related/Sibling</b>	Selecting this check box fetches the documents from the Notes & Attachments related list of all the related or sibling agreements.
<b>Auto-Select Multiple Recipients?</b>	<p>Selecting this checkbox allows you to specify a list of recipients that will be defaulted for the eSignature.</p> <p>To use this option, add DocuSign Recipients related list on the agreement or quote and specify the list for each agreement or quote.</p> <p>If this option is selected, the default recipient from the DocuSign Recipients related list is fetched and populated on the eSignature envelope.</p> <p>If this option is not selected, you can select recipients when an eSignature request is initiated.</p>
<b>eSignature Strict Mode</b>	For future release.

<b>One Click Send</b>	Selecting this check box enables One Click Send feature to directly send the document for eSignature using just one click.  <b>Note:</b> 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.
<b>Select All Attachments</b>	Selecting this checkbox 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.

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

4. In the DocuSign Recipients related list added, click  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 checkbox 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 the 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** checkbox in System Properties. For more information, refer to [System Properties](#).

- ⓘ 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.

 <a href="#">EmailBodyText</a>	EmailText	Default email body text for DocuSign recipient email	Sent to you by: [FirstName] [LastName] [Email] with the DocuSign Electronic Signature Service	<a href="#">Apttus DocuSign Api</a>
 <a href="#">EmailBodyText</a>	EmailText	Default Email Body text for DocuSign recipient email	Please review and electronically sign this request using the link below.	<a href="#">Apttus Contract DocuSign Integration</a>
 <a href="#">EmailBodyText</a>	EmailText	Default email body text for Apttus DocuSign CPO connector	Request for eSignatures. Please review and sign.	<a href="#">Apttus Quote DocuSign Integration</a>
 <a href="#">EmailSubjectText</a>	EmailText	Default email subject for DocuSign recipient email	Documents for your eSignature	<a href="#">Apttus DocuSign Api</a> English
 <a href="#">EmailSubjectText</a>	EmailText	Default email subject text for Apttus DocuSign CLM connector	Request for eSignatures	<a href="#">Apttus Contract DocuSign Integration</a> English
 <a href="#">EmailSubjectText</a>	EmailText	Default email subject text for Apttus DocuSign CPO connector	Request for eSignatures	<a href="#">Apttus Quote DocuSign Integration</a> English

## To customize deliverability of emails

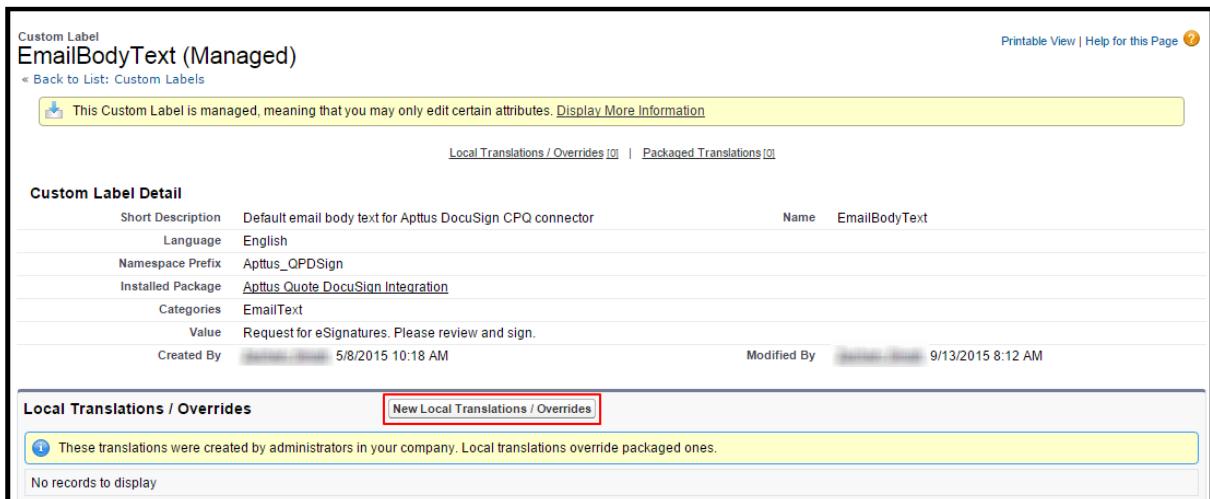
1. Go to **Setup > Administer > Email Administration > Deliverability** and select **All Email** from Access Level picklist menu.
2. Click **Save**.

## 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**.



Custom Label  
**EmailBodyText (Managed)**

Printable View | Help for this Page 

« Back to List: Custom Labels

This Custom Label is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Local Translations / Overrides](#) | [Packaged Translations](#)

**Custom Label Detail**

Short Description	Default email body text for Apttus DocuSign CPQ connector	Name	EmailBodyText
Language	English		
Namespace Prefix	Apttus_QPDSign		
Installed Package	<a href="#">Apttus Quote DocuSign Integration</a>		
Categories	EmailText		
Value	Request for eSignatures. Please review and sign.		
Created By	5/8/2015 10:18 AM	Modified By	9/13/2015 8:12 AM

**Local Translations / Overrides** [New Local Translations / Overrides](#)

These translations were created by administrators in your company. Local translations override packaged ones.

No records to display

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 the **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.

The screenshot shows the 'Text Email Template New Template' page. At the top, there's a 'Select Field Type' dropdown set to 'Account Fields'. Below it is another dropdown for 'Select Field' with 'Account Name' selected. A 'Copy Merge Field Value' button is shown with the value '{!Account.Name}'. A note at the bottom says 'Copy and paste the merge field value into your template below.'

6. Click **Save**.

The screenshot shows the 'New Translation' page. In the 'Translation Edit' section, the 'Save' button is highlighted with a red box. The 'Master Label Information' section includes fields for 'Master Label' (EmailBodyText), 'Master Label Text' (Sent to you by: [FirstName] [LastName] [Email] with the DocuSign Electronic Signature Service), and 'Master Label Language' (English). The 'Translation Information' section shows the 'Language' set to 'English' and the 'Translation Text' containing the merged email body. Both sections have a 'Save' button at the bottom.

## 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**.

**Custom Label**  
**EmailSubjectText (Managed)**

This Custom Label is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Local Translations / Overrides](#) | [Packaged Translations](#)

**Custom Label Detail**

Short Description	Default email subject text for Apttus DocuSign CPQ connector	Name	EmailSubjectText
Language	English		
Namespace Prefix	Apttus_QPDSign		
Installed Package	<a href="#">Apttus Quote DocuSign Integration</a>		
Categories	EmailText		
Value	Request for eSignatures		
Created By	[Redacted]	Created Date	5/8/2015 10:18 AM
		Modified By	[Redacted] 9/13/2015 8:12 AM

**Local Translations / Overrides** [New Local Translations / Overrides](#)

These translations were created by administrators in your company. Local translations override packaged ones.

No records to display

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**.

**New Translation**

**Translation Edit** [Save](#) [Cancel](#)

**Master Label Information** = Required Information

Master Label	<u>EmailSubjectText</u>	Master Label Language	English
Master Label Text	Documents for your eSignature		

**Translation Information**

Language	English
Translation Text	Request for your eSignature

[Save](#) [Cancel](#)

## 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.

- ⓘ 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.

## Use Case: Configuring Multiple Email Templates

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 will be sent to Fast Suppliers. Though we have email subject text and email body text defined in the Custom Labels, the recipient will receive the message added in Additional Details. Message in Additional Details will override the message that is set using Custom Labels.
Scenario 2	Yes / Yes	Yes / No	No / No	Yes	No	The document will be first sent to Fast Suppliers. We have defined Email Subject and Email Body in Custom Labels. However, we have defined a Unique Template Name in DocuSign Recipient.FastSuppliers will receive the message defined in the template that is defined in the Unique Template Name. And, Roxop Cleaners will receive the message that has been defined as Email Subject and Email Body in the Custom Labels.

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 3	Yes / Yes	Yes / No	No / No	Yes	No	The document will be first sent to Fast Suppliers. We have defined Email Subject and Email Body in Custom Labels. However, we have defined a Unique Template Name in DocuSign Recipient.FastSuppliers will receive the message defined in the template that is defined in the Unique Template Name. And, Roxop Cleaners will receive the message that has been edited in Additional Details.

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 4	Yes / Yes	Yes / No	Yes / Yes	Yes	Yes (for Roxop Cleaners)	The document will be first sent to Fast Suppliers. This recipient will receive the message that has been defined in the Template. Then, the document is sent to Roxop Cleaners. This recipient will receive the message that has been edited in the Additional Details section. And, finally, the document is sent to Rusty. This recipient will receive the message that has been defined in the 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.

The screenshot shows the 'Text Email Template' section of the DocuSign for Apttus on Salesforce interface. At the top, there are navigation links: eSign Services Agreements, Agreements, About EchoSign, eSign Services Admin, Manage Agreements, My EchoSign, Data Mappings, eSign Manager, and a plus sign icon. Below the header, the title 'Apttus Email Template For Review Signature (Managed)' is displayed, along with a 'Help for this Page' link.

Below the title, there's a message: 'Preview your email template below.' A yellow banner at the top of the preview area states: 'This Email Template is managed, meaning that you may only edit certain attributes. [Display More Information](#)'.

The 'Email Template Detail' section contains the following information:

Folder	Apttus Email Templates	Available For Use
Email Template Name	Apttus Email Template For Review Signature	<input type="checkbox"/>
Template Unique Name	<b>ApttusEmailTemplateForReviewSignatures</b>	Last Used Date
Namespace Prefix	Apttus	Times Used
Installed Package	Apttus Contract Management	
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)	
Author	[Change]	
Description	Email template for Review and Signatures	
Created By	[REDACTED], 5/8/2015 10:18 AM	Modified By [REDACTED], 11/16/2015 2:13 AM

At the bottom of the detail section are three buttons: Edit, Delete, and Clone.

The 'Email Template' preview section shows the plain text content of the template:

```

Subject: Email for Review and Signatures
Plain Text Preview
Hi,
Please sign the attached document for {Account.Name}.

Regards,
Sam Coop

```

At the top right of the preview section is a button labeled 'Send Test and Verify Merge Fields'.

3. Copy the Template Unique Name and paste it in Template Unique Name. 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 checkbox. 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	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** checkbox.
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** checkbox.
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. Log into 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** checkbox.
6. Click **Save**.

ⓘ 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 retrieve 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 **Check eSignature 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.

1. Go to **Setup > Develop > Visualforce Pages**.
2. Click letter **B** and Select **Batch Job Setup** page.
3. Click **Preview**.

 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

All Scheduled Jobs						Help for this Page 
The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.						
View: <a href="#">All Scheduled Jobs</a> ▾ <a href="#">Create New View</a>						
Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	DocuSign Envelope Status Reader - 15	[REDACTED]	7/24/2015 9:28 AM	9/14/2015 5:15 AM	9/14/2015 6:15 AM	Scheduled Apex
Del	DocuSign Envelope Status Reader - 30	[REDACTED]	7/24/2015 9:28 AM	9/14/2015 5:30 AM	9/14/2015 6:30 AM	Scheduled Apex
Del	DocuSign Envelope Status Reader - 45	[REDACTED]	7/24/2015 9:28 AM	9/14/2015 5:45 AM	9/14/2015 6:45 AM	Scheduled Apex
Del	DocuSign Envelope Status Reader - 60	[REDACTED]	7/24/2015 9:28 AM	9/14/2015 5:00 AM	9/14/2015 6:00 AM	Scheduled Apex

# 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 a 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 of an eSignature request. The Administrator can set default reminders and expiration from 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 standard signature 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.

- i** 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.

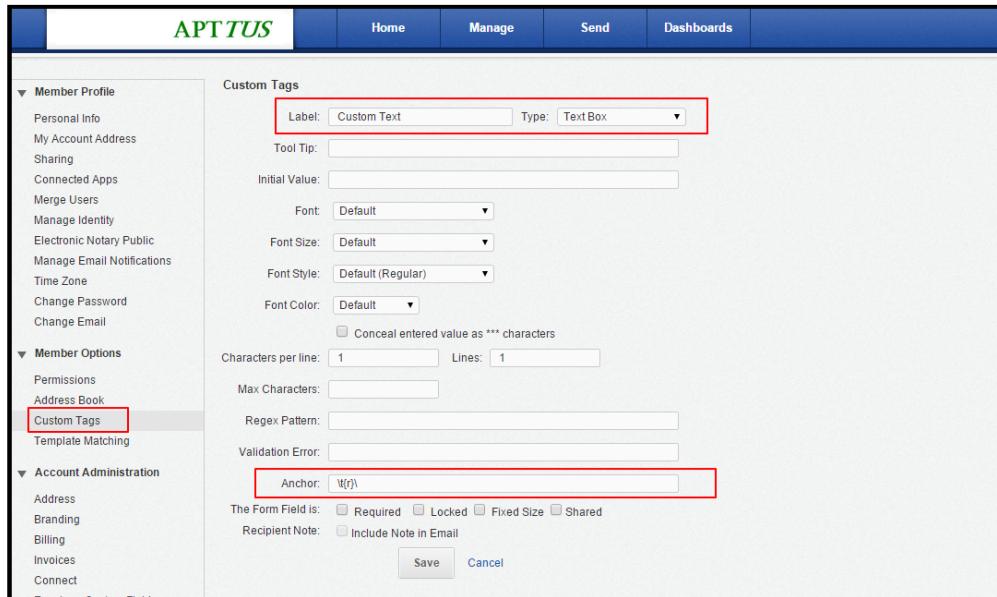
The DocuSign automatic tag characters are: n, s, i, oi, co, t, and d.

## To configure DocuSign tags

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

Custom Tags							
Your Custom Tags		Add					
Type	Label	Tool Tip	Data	Anchor	Shared	Created By	Modified by
Text	Custom Text	\t{r}	No	www.docuSign.com		www.docuSign.com	
Email	Email	\e{r}	No	www.docuSign.com		www.docuSign.com	
SignHere	Please Sign Here	\si{r}	No	www.docuSign.com	www.docuSign.com	www.docuSign.com	5/11/2015 9:42:32 PM PT
Text	Text 2	\t{r}	No	www.docuSign.com		www.docuSign.com	

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
<b>Signature</b>	\si1\	\si2\	\si3\	\si4\
<b>Initial</b>	\in1\	\in2\	\in3\	\in4\
<b>Optional Initial</b>	\oin1\	\oin2\	\oin3\	\oin4\
<b>Name</b>	\na1\	\na2\	\na3\	\na4\
<b>Company</b>	\cy1\	\cy2\	\cy3\	\cy4\
<b>Title</b>	\ti1\	\ti2\	\ti3\	\ti4\
<b>Date Signed</b>	\ds1\	\ds2\	\ds3\	\ds4\
<b>Checkbox</b>	\cb1\	\cb2\	\cb3\	\cb4\
<b>Company</b>	\co1\	\co2\	\co3\	\co4\
<b>Date</b>	\dt1\	\dt2\	\dt3\	\dt4\
<b>Date Signed</b>	\ds1\	\ds2\	\ds3\	\ds4\
<b>Email Address</b>	\em1\	\em2\	\em3\	\em4\
<b>First Name</b>	\fn1\	\fn2\	\fn3\	\fn4\
<b>Full Name</b>	\fna1\	\fna2\	\fna3\	\fna4\
<b>Last Name</b>	\ln1\	\ln2\	\ln3\	\ln4\
<b>Note</b>	\nt1\	\nt2\	\nt3\	\nt4\
<b>Number</b>	\no1\	\no2\	\no3\	\no4\
<b>Radio Group</b>	\rg1\	\rg2\	\rg3\	\rg4\
<b>SSN</b>	\sn1\	\sn2\	\sn3\	\sn4\
<b>Text</b>	\txt1\	\txt2\	\txt3\	\txt4\
<b>Zip</b>	\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.

AgreementLineItem_BasePrice /* MERGEFORMAT */		Apttus__AgreementLineItem_en d /* MERGEFORMAT */
--	--	---

Customer Initial: `\in1\` \_\_\_\_\_  
Signature: `\si1\` \_\_\_\_\_  
Name: `\na1\` \_\_\_\_\_  
Date: `\ds1\` \_\_\_\_\_

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.

AgreementLineItem_BasePrice \* MERGEFORMAT }		Apttus__AgreementLineItem_en d \* MERGEFORMAT }
---	--	--

Customer Initial: \_\_\_\_\_

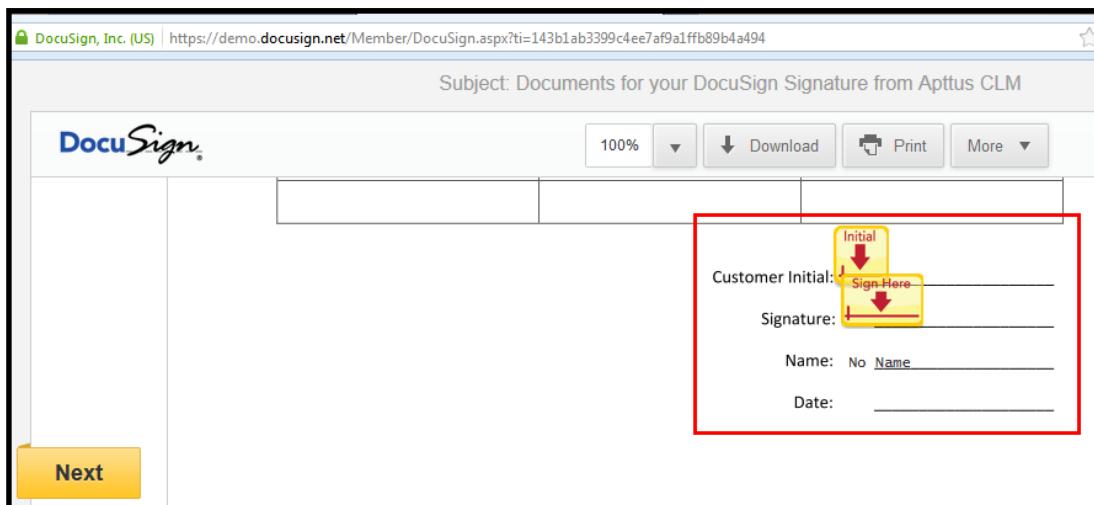
Signature: \_\_\_\_\_

Name: \na\ \_\_\_\_\_

Date: \d1\ \_\_\_\_\_

- 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: Loading DocuSign Templates into Apttus

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 order as defined in the Routing Order column. And, the signer roles can be defined on Adding Recipients page.

Scenario	DocuSign Templates Enabled checked?	Recipient Roles Enabled checked?	Remove Recipient Ordering checked?	Result
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, 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.

Scenario	DocuSign Templates Enabled checked?	Recipient Roles Enabled checked?	Remove Recipient Ordering checked?	Result
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

1. Go to **Setup > Develop > Visualforce Pages**.
  2. Click letter T and Select **TemplateInformationBatchJobSetup** page.
  3. Click **Preview**.
- (i) Step 2 will schedule the batch job.
4. 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

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.

## 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 the 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.

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.

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 the 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.

-  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__Signi
ngOrder__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 objRecipientStatus =
objGetRecipientTabsWrapper.recipientStatus;
System.debug(System.LoggingLevel.ERROR, 'Step 001.1 == >');

String strKey = parentId + objRecipientStatus.routingOrder;

Apttus_DocuApi.DocuSignUtil2.RecipientTabs rTabs = objRecipientStatus.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 == > '+strKey);
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: '+toUpdate.size());
} else{
System.debug('ERROR: UPDATE DocuSignDefaultRecipient: '+toUpdate.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 Class is populated with the callback class name, DocuSignEnvelopeSetRecipientTabs2Imp.
  - Ensure that you select the Recipient Tabs Enabled checkbox under the DocuSign System Properties.
  - In the custom callback class, set the value and the anchor string for the custom tag, getRecipientTabs method is where we 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 string you 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.

- i 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.addRecipientTabs(objSetRecipientTabsWrapper);
        }
        System.debug(System.LoggingLevel.ERROR, 'SETTER : Sep 002 ');
        return listToSetRecipientTabsWrapper;
    }

    public Apttus_DocuApi.SetRecipientTabsWrapper
        addRecipientTabs(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.addRecipientTab(objRecipient);
        }
        System.debug(System.LoggingLevel.ERROR, 'SETTER : Sep 004 ');
        iSetRecipientTabsWrapper.listRecipient = listRecipient;
        return iSetRecipientTabsWrapper;
    }
}
```

```

public Apttus_DocuApi.DocuSignUtil.Recipient
addRecipientTab(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'+iRecipientId+'@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 users to make the tagging order explicit. **Tagging order** is the order in which the signer tags of the 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 the 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 the 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** checkbox 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 the third. Now, using the order

buttons, you can position Rex Klenney as first, Sam Cooper as second, and Mike Hanks as the 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** checkbox in System Properties.



- 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**.

Action	Values	Default	Chart Colors	Modified By
Edit   Del	Signer 1	<input type="checkbox"/>	Assigned dynamically	Rishabh Jha, 12/31/2015 3:26 AM
Edit   Del	Signer 2	<input type="checkbox"/>	Assigned dynamically	Rishabh Jha, 12/31/2015 3:26 AM
Edit   Del	Signer 3	<input type="checkbox"/>	Assigned dynamically	Rishabh Jha, 12/31/2015 3:26 AM
Edit   Del	Signer 4	<input type="checkbox"/>	Assigned dynamically	Rishabh Jha, 12/31/2015 3:26 AM

## 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. Anyone 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 the Finance Department signing group. Any user from the signing group can sign the document. Jon Hacks, a member of the 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 the 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.

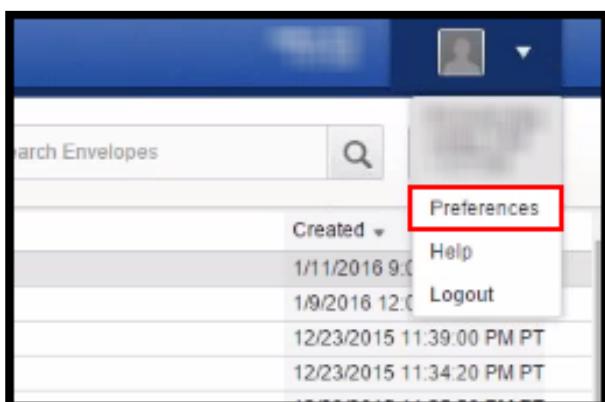
- [Adding members to existing Signing Groups](#)

You can remove the members from a Signing Group using DocuSign for Apttus connector. You can search for a user and remove him from the 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.

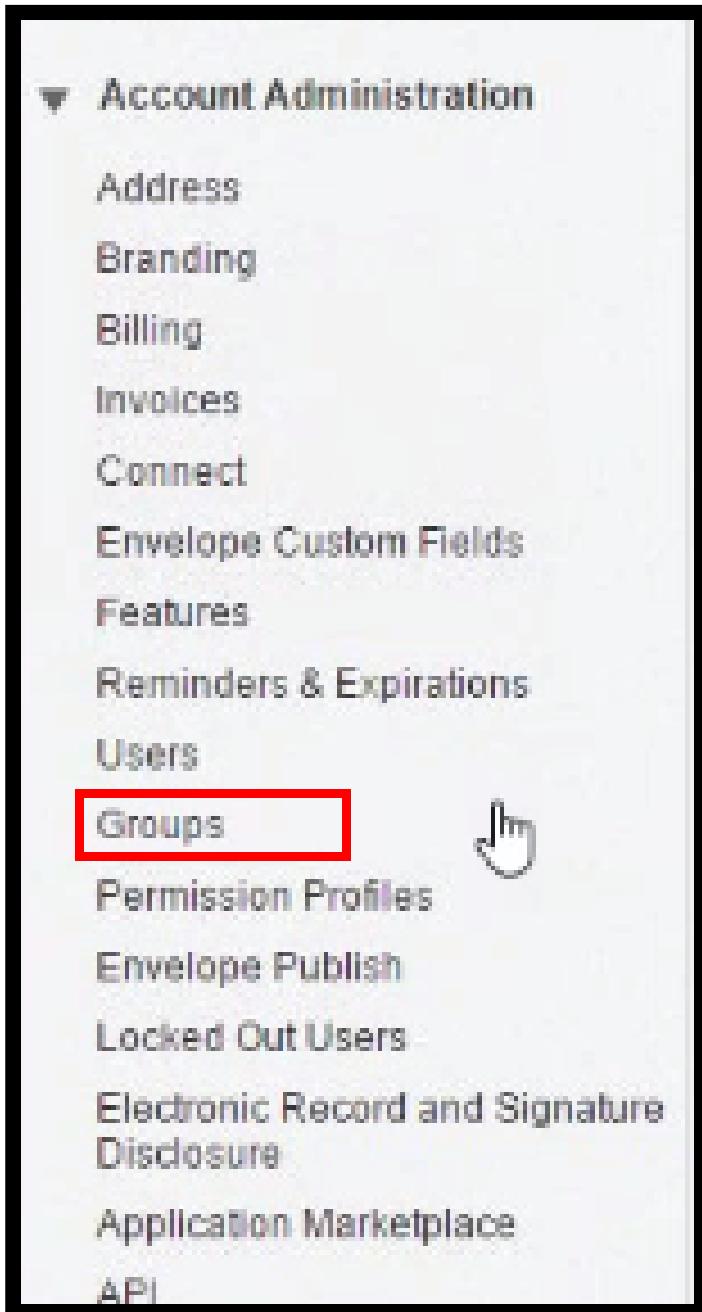
- [Removing members from existing Signing Groups](#)

## To create a signer group in your DocuSign account

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

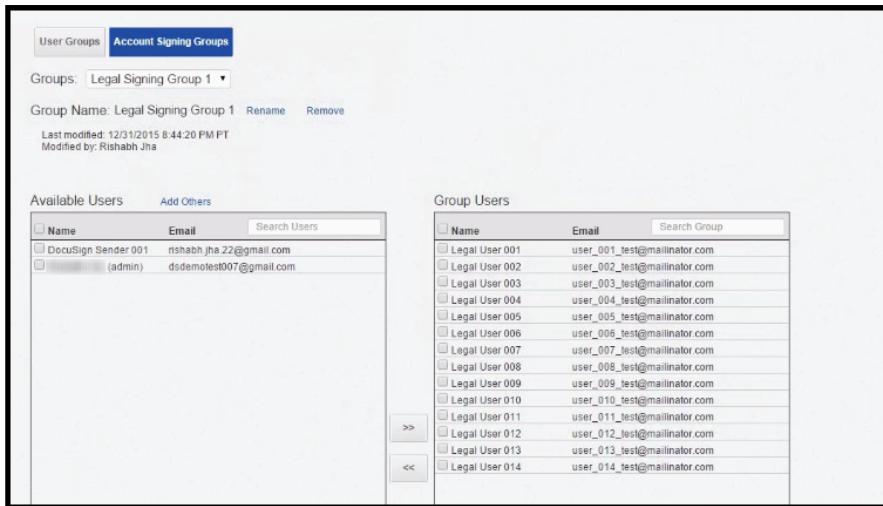


3. Under Account Administration, click **Groups**.



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 an existing signing 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.



Name	Email
DocuSign Sender 001	rishabh.jha.22@gmail.com
(admin)	dsdemotes007@gmail.com

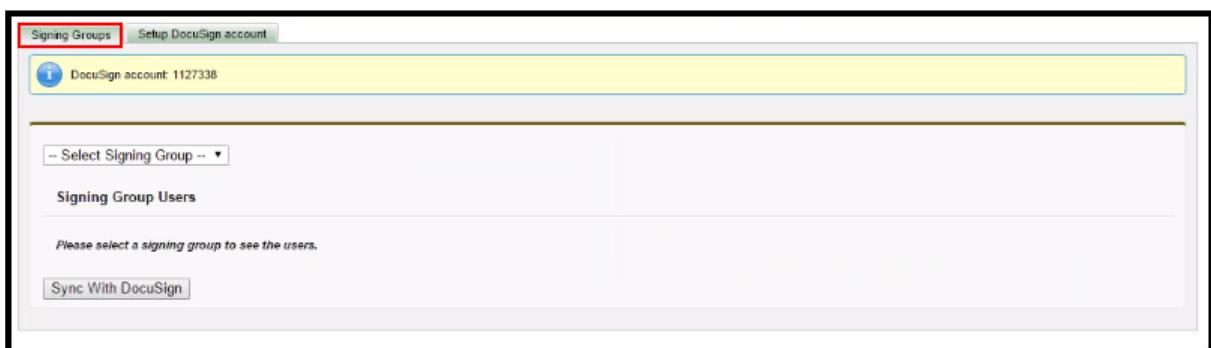
Name	Email	Search Group
Legal User 001	user_001_test@mailinator.com	
Legal User 002	user_002_test@mailinator.com	
Legal User 003	user_003_test@mailinator.com	
Legal User 004	user_004_test@mailinator.com	
Legal User 005	user_005_test@mailinator.com	
Legal User 006	user_006_test@mailinator.com	
Legal User 007	user_007_test@mailinator.com	
Legal User 008	user_008_test@mailinator.com	
Legal User 009	user_009_test@mailinator.com	
Legal User 010	user_010_test@mailinator.com	
Legal User 011	user_011_test@mailinator.com	
Legal User 012	user_012_test@mailinator.com	
Legal User 013	user_013_test@mailinator.com	
Legal User 014	user_014_test@mailinator.com	

10. Click **Save**.

## To sync Signing Groups in your Salesforce Org

1. Log in to your Salesforce Org.
2. Click the **DocuSign Configuration Home** tab.
3. Click the **Signing Groups** tab.

 Your DocuSign Account ID is displayed. Verify it is your account.



-- Select Signing Group --

**Signing Group Users**

Please select a signing group to see the users.

**Sync With DocuSign**

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

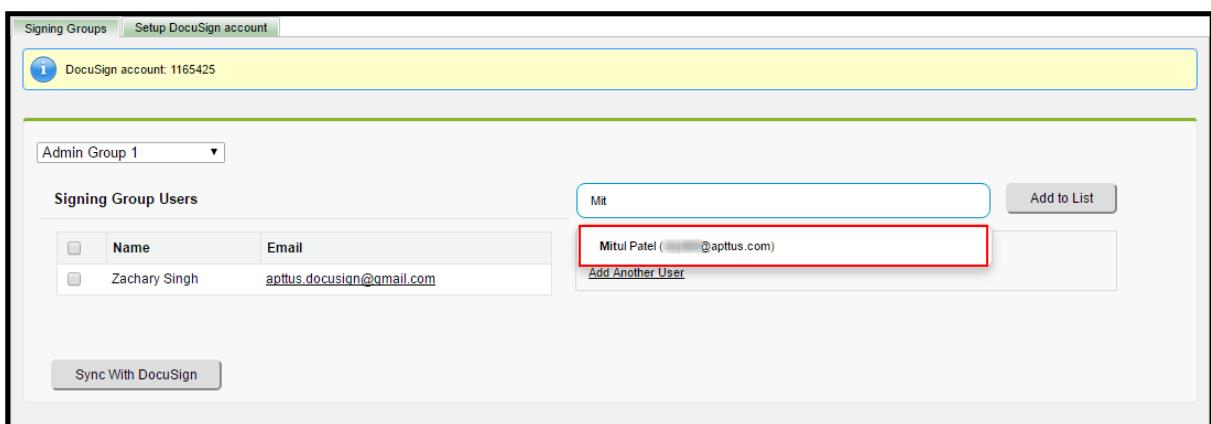
i You must perform this step every time you modify your Signing Group.



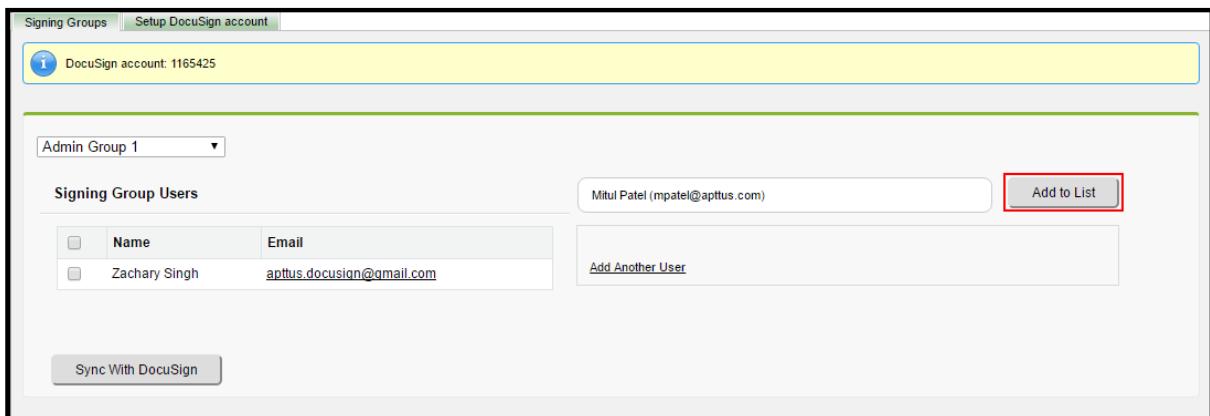
## To add a member in existing signer group

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

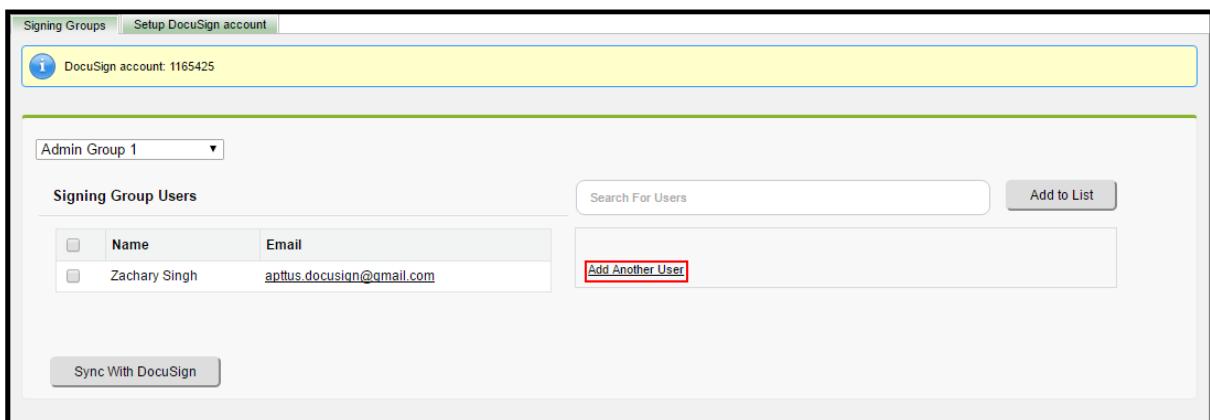
1. Login to your Salesforce Org.
2. Click the **DocuSign Configuration Home** tab.
3. Click the **Signing Groups** tab.
4. Click **Sync With DocuSign**. Apttus recommends you to sync the DocuSign account with Apttus connector before you add or remove a member to your Signer Group.
5. Select the Signing 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**.



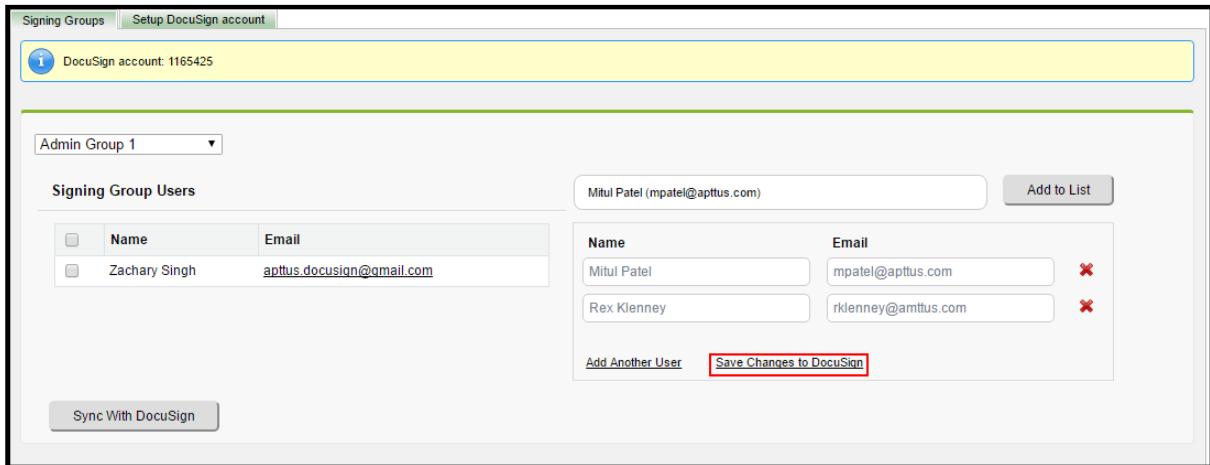
8. To add a new user, click **Add Another User**.



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 signing group itself. However, you can edit the name of a user.

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

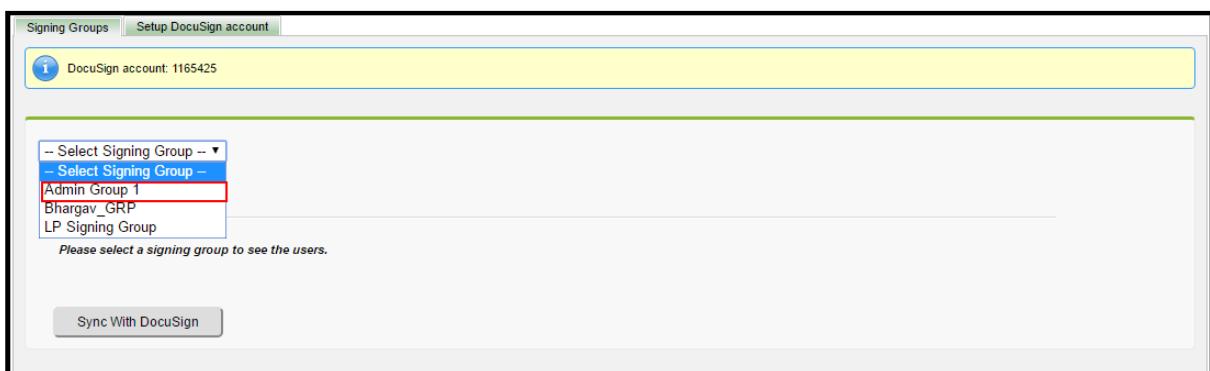
10. Click **Save Changes to DocuSign**.



## To remove a member from an existing signer group

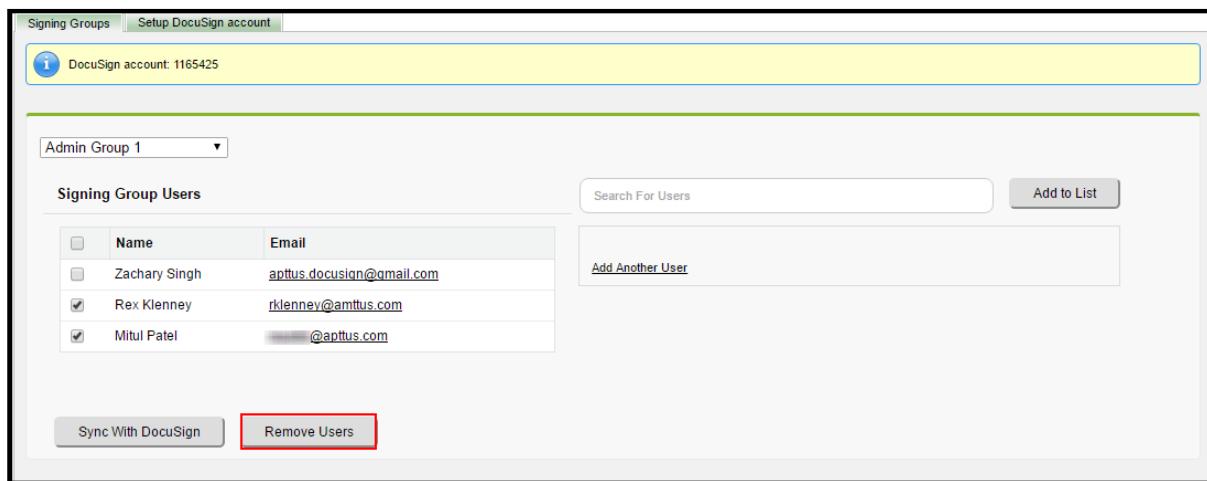
You must have an existing Signer Group in your DocuSign Account.

1. Login to your Salesforce Org.
2. Click the **DocuSign Configuration Home** tab.
3. Click the **Signing Groups** tab.
4. Click **Sync With 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** checkbox 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.

- ⓘ 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.

The following table explains how you can set reminders and expiration checks using a combination of DocuSign Account fields and Additional Details section fields.

DocuSign Account Fields	Additional Details Section Fields	Result
<ul style="list-style-type: none"> <li>Send Reminder in [] Days: <b>10</b></li> <li>Expire/Void Envelope in [] Days: <b>30</b></li> <li>Repeat every [] Day(s) until Complete: <b>2</b></li> <li>Warn of Expiration [] Day(s) prior: <b>5</b></li> <li>Do NOT allow users to override these settings checked?: <b>Yes</b></li> </ul>	<ul style="list-style-type: none"> <li>Use Default Reminders &amp; Expiration checked?: <b>Yes</b></li> </ul>	<p>A reminder is sent 10 days after you send the document. Every 2 days a reminder is sent until the document is signed. A warning of expiry of the document is provided 5 days before the document expires. The document expires in 30 days after it is sent.</p> <p><b>Note:</b> The user <b>Can Not</b> view the fields pertaining to Reminders and Expiration on the Additional Details screen.</p>
<ul style="list-style-type: none"> <li>Send Reminder in [] Days: <b>10</b></li> <li>Expire/Void Envelope in [] Days: <b>30</b></li> <li>Repeat every [] Day(s) until Complete: <b>2</b></li> <li>Warn of Expiration [] Day(s) prior: <b>5</b></li> <li>Do NOT allow users to override these settings checked?: <b>No</b></li> </ul>	<ul style="list-style-type: none"> <li>Use Default Reminders &amp; Expiration checked?: <b>Yes</b></li> </ul>	<p>A reminder is sent 10 days after you send the document. Every 2 days a reminder is sent until the document is signed. A warning of expiry of the document is provided 5 days before the document expires. The document expires in 30 days after it is sent.</p> <p><b>Note:</b> The user <b>Can Not</b> view the fields pertaining to Reminders and Expiration on the Additional Details screen.</p>
<ul style="list-style-type: none"> <li>Send Reminder in [] Days: <b>10</b></li> <li>Expire/Void Envelope in [] Days: <b>30</b></li> <li>Repeat every [] Day(s) until Complete: <b>2</b></li> <li>Warn of Expiration [] Day(s) prior: <b>5</b></li> <li>Do NOT allow users to override these settings checked?: <b>Yes</b></li> </ul>	<ul style="list-style-type: none"> <li>Use Default Reminders &amp; Expiration checked?: <b>Yes</b></li> <li>Send a Reminder to signers [] day(s) after receipt: <b>10</b></li> <li>Expire request in [] day(s): <b>30</b></li> <li>Continue to send reminders every [] days: <b>2</b></li> <li>Warn Signers [] day(s) before request expires: <b>5</b></li> </ul>	<p>A reminder is sent 10 days after you send the document. Every 2 days a reminder is sent until the document is signed. A warning of expiry of the document is provided 5 days before the document expires. The document expires in 30 days after it is sent.</p> <p><b>Note:</b> The user <b>Can Not</b> change settings in Additional Details section.</p>

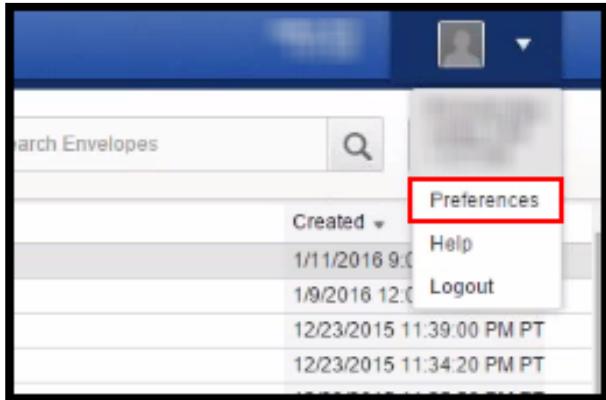
DocuSign Account Fields	Additional Details Section Fields	Result
<ul style="list-style-type: none"> <li>Send Reminder in [] Days: <b>10</b></li> <li>Expire/Void Envelope in [] Days: <b>30</b></li> <li>Repeat every [] Day(s) until Complete: <b>2</b></li> <li>Warn of Expiration [] Day(s) prior: <b>5</b></li> <li>Do NOT allow users to override these settings checked?: <b>No</b></li> </ul>	<ul style="list-style-type: none"> <li>Use Default Reminders &amp; Expiration checked?: <b>No</b></li> <li>Send a Reminder to signers [] day(s) after receipt: <b>5</b></li> <li>Expire request in [] day(s): <b>180</b></li> <li>Continue to send reminders every [] days: <b>2</b></li> <li>Warn Signers [] day(s) before request expires: <b>30</b></li> </ul>	<p>A reminder is sent 5 days after you send the document. Every 2 days a reminder is sent until the document is signed. A warning of expiry of the document is provided 30 days before the document expires. The document expires in 180 days after it is sent.</p> <p><b>Note:</b> The user <b>Can</b> change settings in Additional Details section.</p>
N/A	<ul style="list-style-type: none"> <li>Use Default Reminders &amp; Expiration checked?: <b>No</b></li> <li>Send a Reminder to signers [] day(s) after receipt: <b>5</b></li> <li>Expire request in [] day(s): <b>365</b></li> <li>Continue to send reminders every [] days: <b>1</b></li> <li>Warn Signers [] day(s) before request expires: <b>7</b></li> </ul>	<p>A reminder is sent 5 days after you send the document. Every 1 day a reminder is sent until the document is signed. A warning of expiry of the document is provided 7 days before the document expires. The document expires in 365 days after it is sent.</p> <p><b>Note:</b> The user <b>Can</b> change settings in Additional Details section.</p>

DocuSign Account Fields	Additional Details Section Fields	Result
N/A	<ul style="list-style-type: none"> <li>• Use Default Reminders &amp; Expiration checked?: <b>0</b></li> <li>• Send a Reminder to signers [] day(s) after receipt: <b>0</b></li> <li>• Expire request in [] day(s): <b>0</b></li> <li>• Continue to send reminders every [] days: <b>0</b></li> <li>• Warn Signers [] day(s) before request expires: <b>0</b></li> </ul>	<p>0 is populated in each field.</p> <p>Note: The user Can Not view the fields pertaining to Reminders and Expiration on the Additional Details screen.</p>
<ul style="list-style-type: none"> <li>• Send Reminder in [] Days: <b>10</b></li> <li>• Expire/Void Envelope in [] Days: <b>30</b></li> <li>• Repeat every [] Day(s) until Complete: <b>2</b></li> <li>• Warn of Expiration [] Day(s) prior: <b>5</b></li> <li>• Do NOT allow users to override these settings checked?: <b>No</b></li> </ul>	<ul style="list-style-type: none"> <li>• Use Default Reminders &amp; Expiration checked?: <b>No</b></li> </ul>	<p>A reminder is sent 10 days after you send the document. Every 2 days a reminder is sent until the document is signed. A warning of the expiry of the document is provided 5 days before the document expires. The document expires in 30 days after it is sent.</p> <p>Note: The user can change settings in the Additional Details section. When the user leaves the values blank, the default values mentioned in DocuSign account are used.</p>

**⚠️** 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.

▼ **Account Administration**

[Address](#)

[Branding](#)

[Billing](#)

[Invoices](#)

[Connect](#)

[Envelope Custom Fields](#)

[Features](#)

[Reminders & Expirations](#)

[Users](#)

[Groups](#)

[Permission Profiles](#)

[Envelope Publish](#)

[Locked Out Users](#)

[Electronic Record and Signature Disclosure](#)

[Application Marketplace](#)

[API](#)

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

Field	Description
-------	-------------

<b>Send Reminder in [] Days</b>	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.
<b>Expire/Void Envelope in [] Days</b>	Enter the number of days in which you want the envelope to expire, after you send the document. For example, you send the document today and you enter the value as 365. The envelope will be valid for a year.
<b>Repeat every [] Day(s) until complete</b>	Enter the frequency of reminders in the 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.
<b>Warn of expiration [] Day(s) prior</b>	Enter the number of days before which you want to send a reminder about the 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 the 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**.

**Set Default Reminders and Expirations**

These settings will be the default settings for your account.

Do NOT allow users to override these settings.  
 Send Reminder in  Days.      Repeat every  Day(s) until complete.  
 Expire/Void Envelope in  Days.   Warn of expiration  Day(s) prior.

Save Done

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 the 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 checkbox in the System Properties must be disabled. Also, you must pass a parameter `&oneclick=true` in the URL with your envelope Id.

- ⓘ 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 use case:

One-Click Send checkbox enabled?	Value of <code>&amp;oneclick=</code> 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.

- ⚠ If One-Click Send checkbox is enabled, the `&oneclick=` parameter is not checked by the system.

### To disable one-click send feature checkbox

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** checkbox.
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	The 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.

# Frequently Asked Questions

## **Does DocuSign have API call rate limit?**

There are no limits for outbound calls from Contract Management to DocuSign but DocuSign has implemented API Call Rate Limits to balance loads. For more information, see [API Call Rate Limits](#).

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