DocuSign for Apttus on Salesforce Spring

2020 User Guide

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About This Guide

With the DocuSign for Apttus User 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 User Guide is designed to provide administrators with information on setting up DocuSign for Apttus. It covers information, step-by-step instructions, and use cases for the features provided by DocuSign for Apttus.
Primary Audience	Individuals who are working on any aspect of contracts: contract managers, contract creators, contract negotiators, and contract reviewers
IT Environment	Refer to the latest DocuSign for Apttus on Salesforce Release Notes for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, refer to What's New topic.
Other Resources	• Contract Management User Guide: Refer to this guide to set-up the entire contract management process. • DocuSign for Apttus Administrator Guide: Refer to this guide to set-up the entire DocuSign process. • X-Author User Guide: Refer to this guide for detailed instructions on setting up templates and editing agreement documents.

This guide describes the following tasks:

- eSignature Workflow
- Sending documents for eSignatures
- Checking eSignature status
- Recalling an eSignature request
- Viewing Signed documents

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

- Basic Salesforce administration
- Salesforce and Apttus terms and definitions

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- Apttus Contract Management administration

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

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What's New

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

Document	Topic	Description
Spring 2020	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Winter 2019	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Summer 2019 Rev A	About DocuSign for Apttus Adapter	Updated topic to conform with Apttus Documentation standards.
	Adding Attachments	Modified topic. Updated the note to reflect Salesforce's limitation on file size.
Summer 2019	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Spring 2019	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Winter 2018	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Summer 2018	N/A	No new features were added for this release. The guide was updated to reflect product name changes.

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Getting Started

This topic contains the following sections:

- Overview
- Logging into Apttus DocuSign for Apttus
- Proposals and Agreements

Overview

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. The integration can be used for both Apttus Proposals and Apttus Agreements.

Logging into Apttus DocuSign for Apttus

An Apttus provisioned DocuSign account is necessary to send for eSignature using the connector. A DocuSign admin needs to be logged in first; for more information on DocuSign Admin Setup, refer to DocuSign Admin Setup. If you do not have an Apttus provisioned account, your admin may turn on **Auto Provisioning** in the DocuSign System Properties. This setting will let you provision an account using the connector.

Log in to your Salesforce org to access DocuSign for Apttus connector.

> **Note**
>
> Do not use Back button on the browser when using the DocuSign for Apttus connector.

To log into DocuSign for Apttus connector

1. Go to http://www.salesforce.com.
   Or

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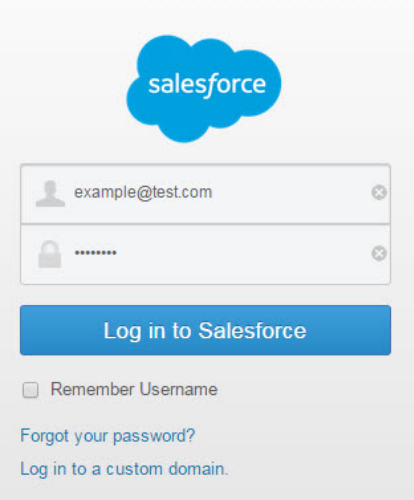
If your organization is using a sandbox or test environment to access Apttus Adobe Sign (for example, if you are doing user acceptance testing), go to http://test.salesforce.com instead.

2. In the toolbar at the top of the page, click **Login**. The login page opens.



3. Enter your User Name and Password, and click **Log in to Salesforce**.
You have successfully logged into DocuSign for Apttus connector.

Proposals and Agreements

The DocuSign for Apttus connector works with both Apttus Proposals (CPQ) and Apttus Agreements (CLM). The connector works in the same way for both of the Apttus products and as a result, this guide will be generic in order to allow users of both products to use it.

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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 a user to perform the following tasks:

- Use DocuSign for Apttus Adapter with Contract Management
- Use DocuSign for Apttus Adapter with Quote/Proposal
- Finalize your document in DocuSign
- Send documents for eSignature
    - Add or delete attachments
    - Add or delete Recipients
    - Add or delete additional details
        - Configure custom email subject
        - Configure custom email message
    - Configure email notifications and reminders
    - Send documents for eSignature with Single click
- Check eSignature status
- Recall eSignature request
- Edit eSignature Request

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- View signed documents

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.
Finalize in eSign Server	A feature that allows you to open the envelope inside the DocuSign console.
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.

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Pre-requisites

You must have the following in order to use DocuSign for Apttus Adapter.

- DocuSign Account
- Post-Installation Configuration
- Add an Attachment
- Add a Recipient

DocuSign Account

In order to send a document for eSignature, you need an active DocuSign account. If your admin needs to set up your account, please contact you system admin. If you do not have an account and wish to use the connector to provision one, please request you system admin to turn on **Auto Provisioning** in the DocuSign System Properties.

If your system admin has already turned on Auto Provisioning and you do not have a DocuSign account, your information will be auto-populated in Create an Account section.

To create a DocuSign account

1. In Salesforce, cilck the **DocuSign Configuration Home** tab.
2. If you do not posses a DocuSign account, the information in Create an Account section will be auto-populated with your login information.

> **Note**
>
> If you have not entered company name in your Salesforce org, Company Name field will be blank. You must ensure that you add a company name to your Salesforce org before you create a DocuSign Account.

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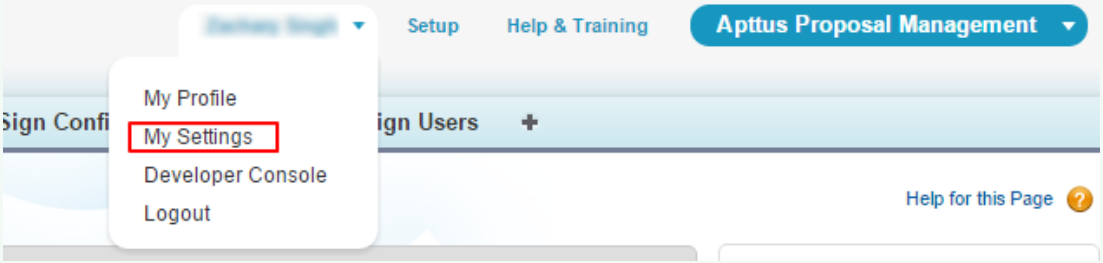
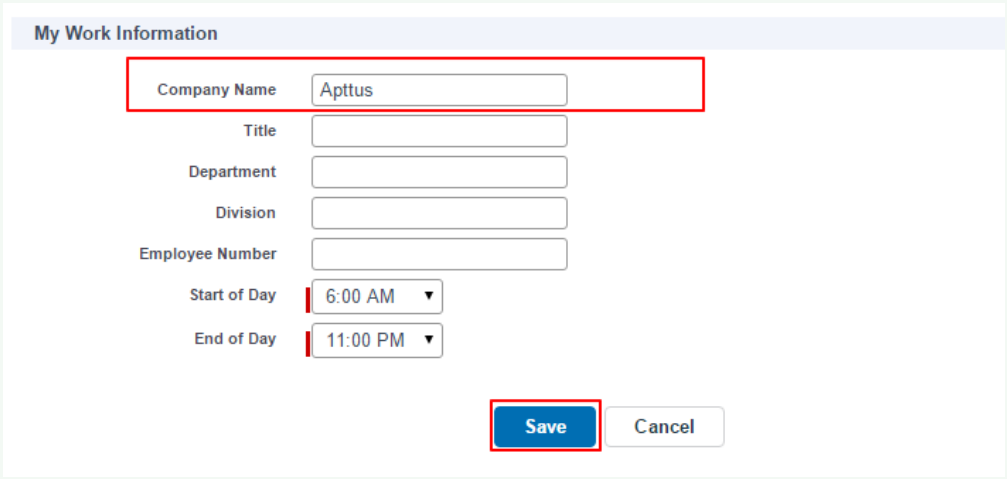
To add a company name in your Salesforce org.
Go to **User Menu** > **My Settings** > **Personal** > **Personal Information** and enter your **Company Name** under My Work Information section; click **Save**.





Click **DocuSign Configuration Home** tab and refresh the page. You will see Company name is auto-populated.

3. Select the **I Agree to Terms and Conditions** check box if you agree to the terms and conditions after reading them.
4. Click **Create Account**.

> **Note**
>
> You will receive an email with a link to activate the account. You must activate the account manually before you proceed to login.

Post-Installation Configuration

The DocuSign for Apttus connector allows you to customize the user experience. You can customize your account from setting default values, associating users to your DocuSign

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account, configuring buttons, hiding buttons, changing document options and much more. The connector can be made to work with many sets of configurations. Your system admin will be the user that will set the various configurations. You can contact your system admin if something is not working correctly, it may be a configuration setting issue that needs to be directed to the system admin.

Adding an Attachment

You must attach at least one file in the Notes & Attachments related list for the record if you want to use only the Send for eSignature feature. If you would prefer to attach the attachment in DocuSign, then you use the Finalize in DocuSign feature. You can attach either a PDF, DOC, DOCX, or RTF file type. The connector does not rely on the Document Generation module, allows you to attach any file type into the DocuSign envelope. However, DocuSign only allows the aforementioned document types to actually be processed.

Adding a Recipient

The DocuSign for Apttus connector looks in two different areas to pull the recipients for the eSignature request. The first is a field that is specified within the custom settings. Usually, this will look at your primary contact, but it can point to wherever the admin chooses to set it. The other place is the DocuSign Recipients related list (previously called DocuSign Default Recipients). This related list allows users to add multiple recipients before they get to the eSignature pages. In order to use this list, the admin needs to allow it in the custom settings and needs to expose the list in the page layout.

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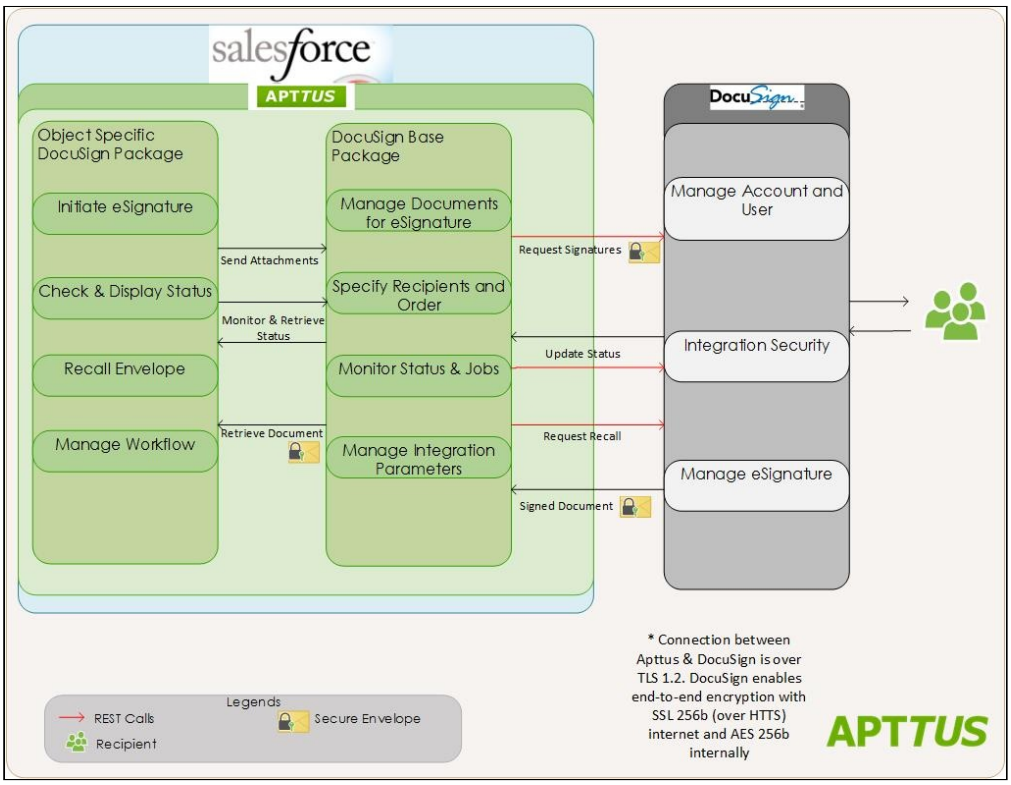
eSignature Request Workflow

This section elaborates the end to end workflow process from initiating eSignature to Managing Integration settings from Apttus.



After your Quote or Contract is configured and finalized with the required products, you can initiate the eSignature process when the agreement is generated and the document is ready for signature. The workflow is as follows:

1. Select the attachments to be associated to the Agreement or Proposal. You can choose to auto attach documents or do it manually.
2. Specify the order in which the attachments are merged to create a single agreement or proposal.
3. Select or specify the recipients. You can choose to send the document to preconfigured default recipients and add additional recipients later on.
4. Specify the email message.
5. Preview the eSignature request.
6. Submit the document for eSignature.
7. Check eSignature status.

The sections further in the document take you through the configurations required for each of the processes.

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Using DocuSign for Apttus with Contract Management

After you have generated an agreement document, you can send that document – and any supporting documents – for the agreement record to be signed via DocuSign.

By default, when an agreement record reaches the *Status Category* of *Request*, you can *Generate* your agreement document. This changes the Status Category and Status and enables you to send agreement documents for eSignature. You can now enter a list of recipients for a customer when the customer initiates a signature. You can also add, edit, or remove recipients from the list of default recipients. Once the documents have been signed, they will be attached to the agreement record and the statuses will be updated.

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Using DocuSign for Apttus with Quote/ Proposal

The same as with agreements, after you have generated a quote document you can send it – and any supporting documents – for the quote record to be signed via DocuSign.

The procedures included in the previous section for Agreements are equally applicable for Quotes, with the exception that there are no related, child, or sibling records, that could be a source of documents.

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Sending for eSignature

After you have generated an agreement document, you can send that document - and any supporting documents - for the agreement record to be signed via DocuSign. By default, when an agreement record reaches the Status Category of Request, you can Generate your agreement document. This changes the Status Category and Status and enables you to send agreement documents for eSignature. You can now enter a list of recipients for a customer when the customer initiates a signature. You can also add, edit, or remove recipients from the list of default recipients. Once the documents have been signed, they will be attached to the agreement record and statuses will be updated.

- Adding Attachments
- Adding Recipients
- Adding Additional Details
- Finalizing in DocuSign
- Sending the Request

Adding Attachments

In order to send a document for eSignature, you first need to have a document attached to the record. When you send the documents for eSignature, you can add the document to be sent for eSignature manually or auto attach it with agreement. You can manually attach a document using the Salesforce attachment process, or you can use Apttus Document Generation.

You can add an attachment in one of the following ways.

- Manually attach one or more documents
  You can manually attach the document using Salesforce attachment process.

- Attach a document using Apttus Document Generation
  You can use templates to generate a document using Salesforce field values. You can use this feature only if your system admin has configured Add Attachments Enabled.

To attach a document manually

1. Select the agreement that you want to attach the document.
2. Under the Notes & Attachments related list, click **Attach File**.

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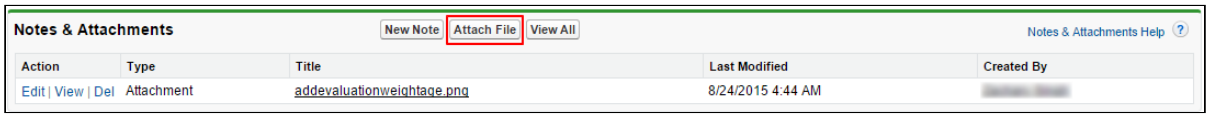
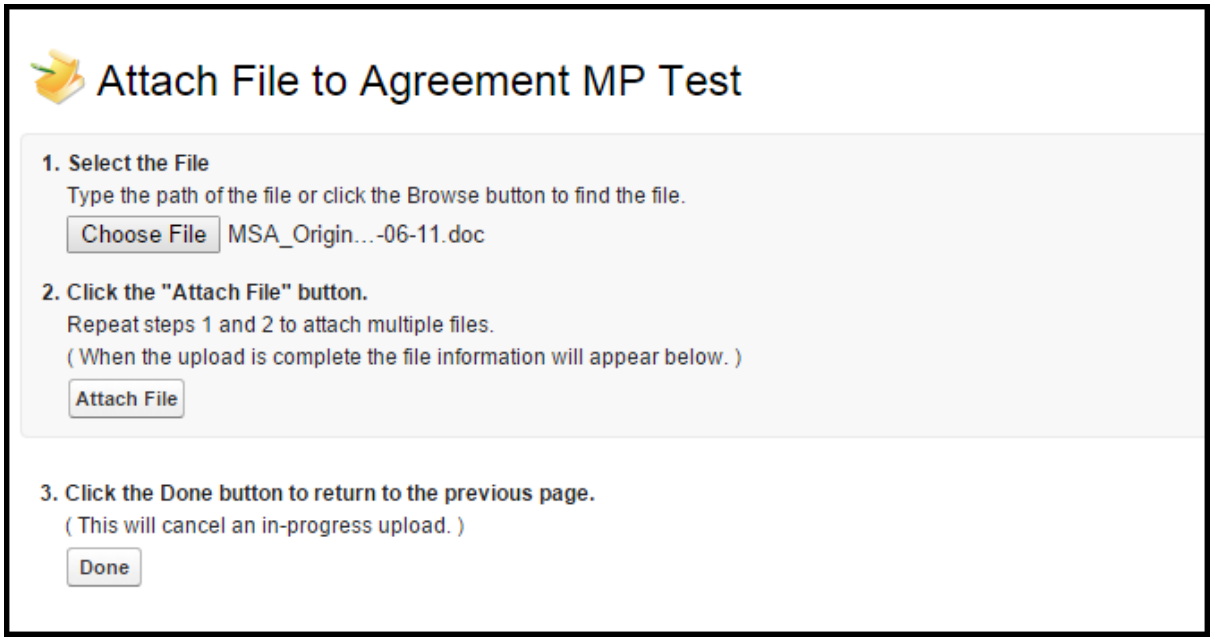


3. Click **Choose File** and select the agreement that you want to upload.

> **Note**
>
> Ensure that you do not upload a file of size over 12 MB. You can attach a file larger than 12 MB, but because of Salesforce's governor limits it will not be included in the envelope being sent for eSignature.

4. Click **Attach File**.
5. Click **Done**.



To select the documents to be sent for signature

1. Once you click **eSignature**, you will be redirected to Add Attachments page.
2. The files in your **Notes & Attachments** related list are displayed on this page.
3. Select the check box for the file name that you want to send for signature.
4. Click **Add Recipients** to add recipients other than default recipients.
   -or-
   Click **Finalize in DocuSign** finish the envelope inside of DocuSign.
   -or-
   Click **Send for Signature** to directly send the document for signature.

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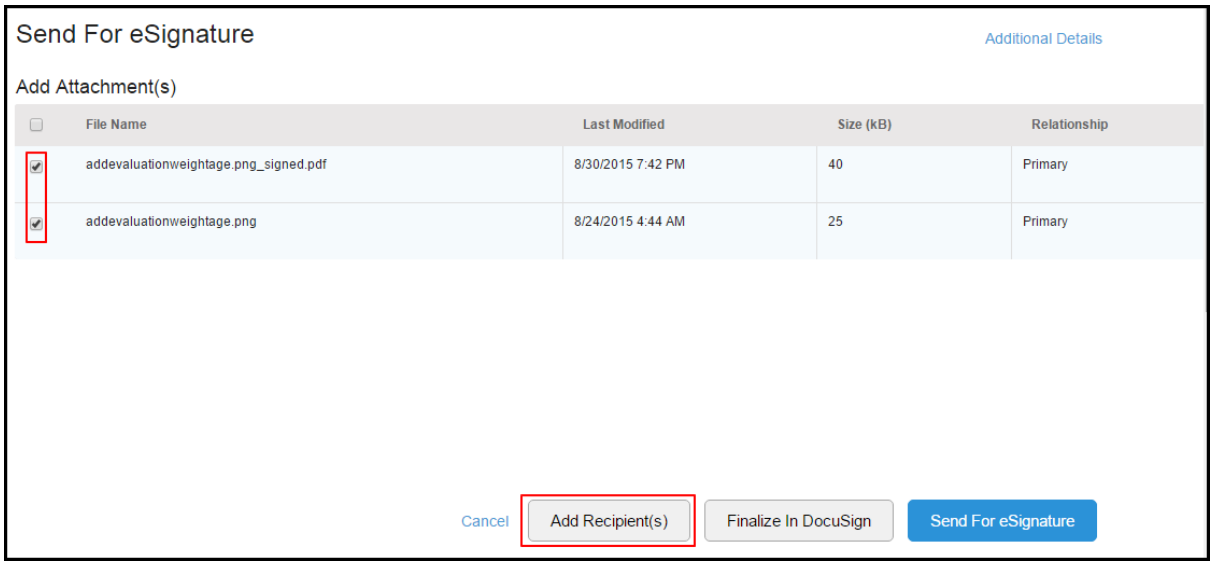

If **DocuSign Batch Processing Disabled** is set to *true*, the maximum size of the attachment should not exceed beyond 6 MB per attachment. To add attachment greater than 6 MB, set the **DocuSign Batch Processing Disabled** to *false*.

Adding Recipients

In order to send a document for eSignature, you also need to have a recipient attached to the record. Based on your org's settings, you may have the recipients being pulled from the DocuSign Default Recipients related list or from a contact field such as Primary Contact. To add new recipients during sending the document for eSignature, Add Recipients Enabled custom setting must be enabled in DocuSign System Properties.

The Add Recipients screen is a table that contains a list of the recipients that the envelope will be sent to. The table has the name of the recipient, the email for the recipient, the routing order, and the signer type.

- To add a default recipient
- To add a salesforce contact as recipient
- To add a new recipient

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To add a default Recipient

1. Click the **Agreements** tab.
   or
   Click the **Proposals** tab.
2. Select the appropriate agreement (or proposal).
3. Under the DocuSign Default Recipients related list, click **New eSigner - Agreement**.
   or
   Under the DocuSign Default Recipients related list, click **New eSigner - Proposal**.

   > **Note**
   >
   > If you are using Salesforce Classic mode, contact your system admin if you see **New** button at top of the list. Your system admin must edit the layout of the page to include New eSigner - Agreement / New eSigner - Proposal button.

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

4. Select **Recipient Record Type** from Record Type of new record picklist. The available options are.

   - **Contact** - Contact Lookup
   - **Email** - Manually enter recipient's information
   - **User** - User Lookup
   - **Singing Group** - To select a Signing Group

5. Click **Continue**.

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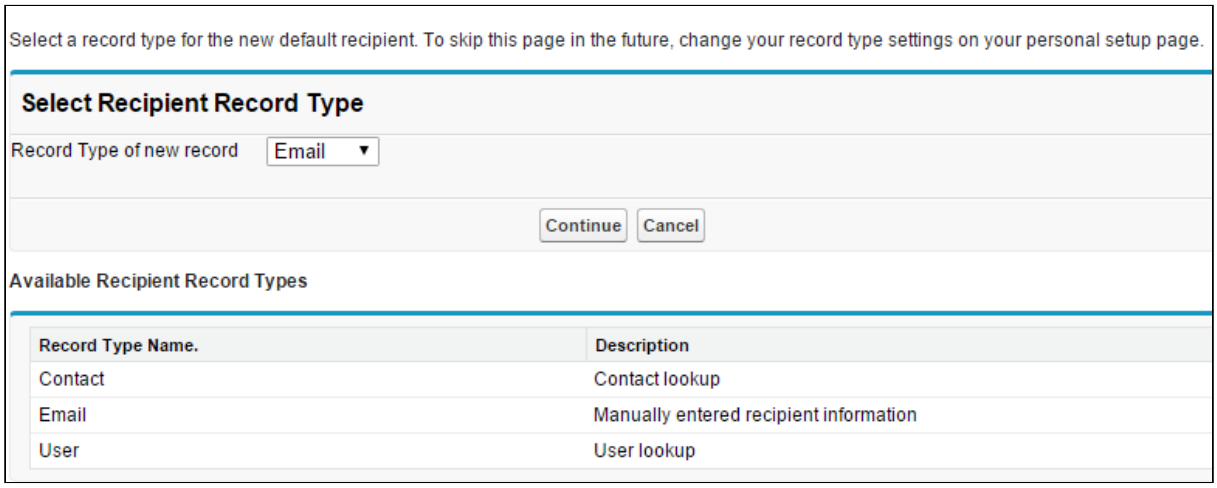

6. If you have selected **Contact**, click and select the appropriate contact.
   -or-
   If you have selected **Email**, Enter **Recipient First Name**, **Recipient Last Name**, and **Recipient Email Address**.
   -or-
   If you have selected **User**, click and select the appropriate user.
   -or-
   If you have selected Signing Group, click and select the relevant signing group.
7. Select the type of recipient from **Recipient Type** picklist. The available options are.

Option	Description
Signer	Signer is a regular eSignature signer.
Carbon Copy	Carbon Copy singer is sent the copy of the current document.
In-Person Signer	In-Person Signer is a host who monitors the signature from the recipient in person.

8. Enter the **Routing Order** to define the order of the users in which the document has to be sent.
9. Select the **Role Name** of the recipient. You can make the tagging order explicit by selecting appropriate role name. For example, you add three users - Sam Cooper, Mike Hanks, and Rex Klenney - in the same order. Now, you want the signing tag of Rex Klenney to be on top of all signers, Sam Cooper's tag to be second, and Mike Hanks as third. For Rex Klenney, select Signer 1; for Sam Cooper, select Signer 2; and for Mike Hanks, select Signer 3. Now, in the document to be signed, the tags will be in the order as Rex Klenney, Sam Cooper, and Mike Hanks.

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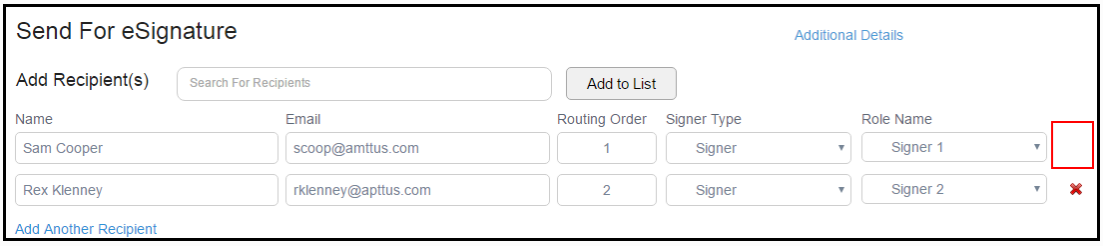
> **Note**
>
> The available options are Signer 1, Signer 2, Signer 3, and Signer 4. If you have more than 4 signers, contact your administrator to add more signers in the role name object.

10. Enter the unique template ID in **Email Template Unique Name**. The Email Template Unique Name is defined in the email template. Contact your administrator if you do not have access to the Email Templates.

> **Note**
>
> You can configure different email messages for each of your recipients. For more information on configuring multiple email templates, refer to Configuring Multiple Email Templates.
> 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 used to send an email to your recipients.

11. Select the **Required?** check box if you want to set this recipient as a default recipient. After you select this check box, users will not be able to remove this recipient from the Recipients list. You can change the signing order of your recipients, but you can not remove this recipient from the Recipients list. If you can not view the **Required?** field, then Edit your Layout to include Required? field. If you can not edit the layout, contact your system administrator.

> **Note**
>
> On the Add Recipients screen, the delete icon will disappear for this default recipient.
>
> 
>

12. Enter a private message for your recipient in the **Note** text box. The message that you enter in the text box will be displayed in the email, as a private message, that is sent to the recipient for eSignature and on your DocuSign Review page when you click **Review Document** from your email.

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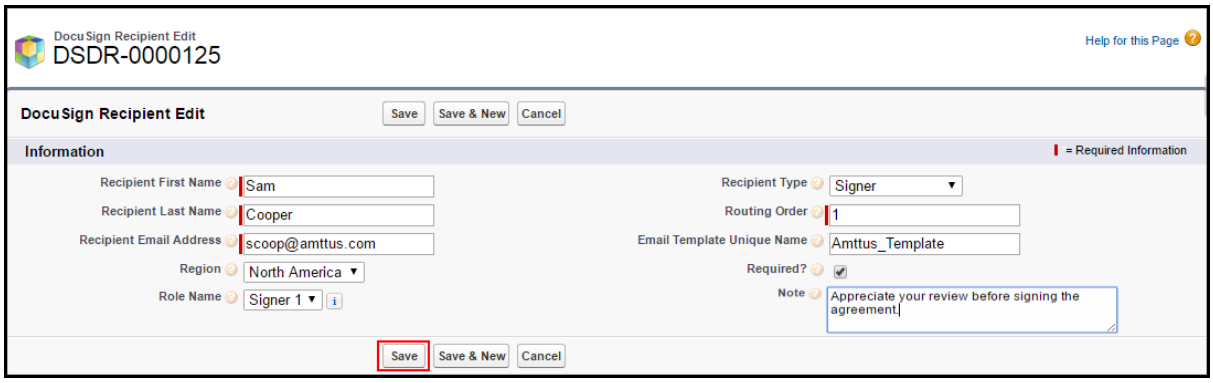
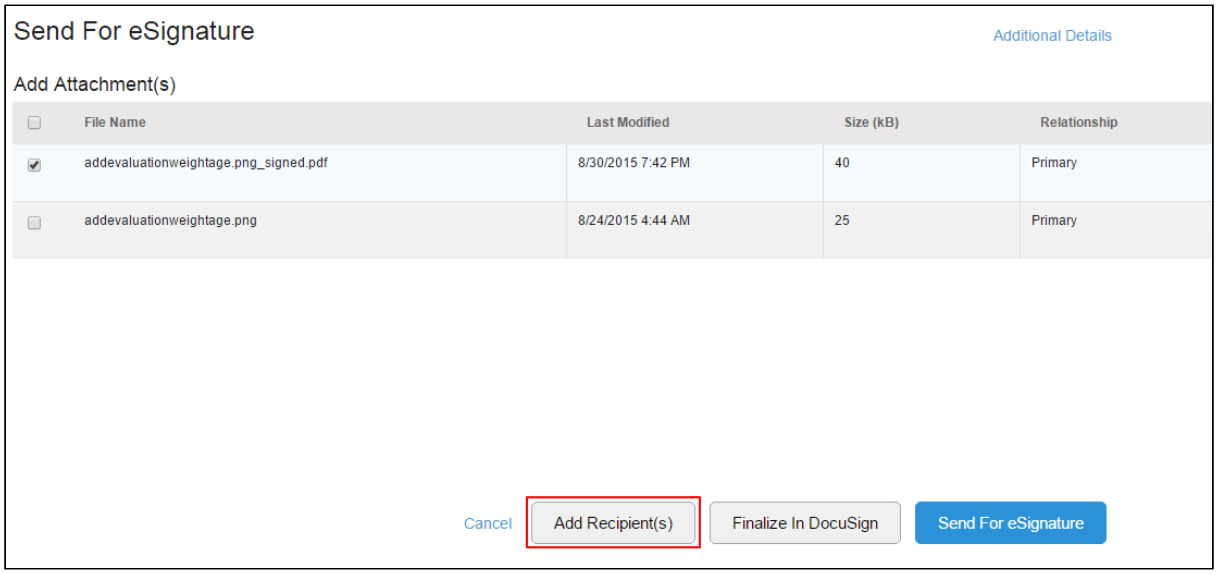
13. Click **Save**.

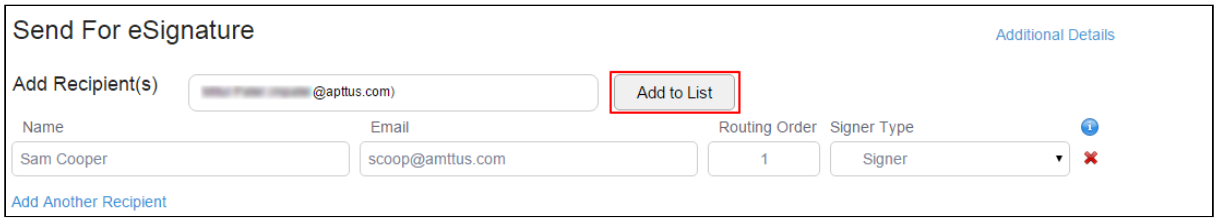


To add salesforce contact as recipient

1. Click **Add Recipients**.



2. Enter the appropriate keyword to search and select the appropriate user. This search will look up the Salesforce contacts only.
3. Click **Add to List**.



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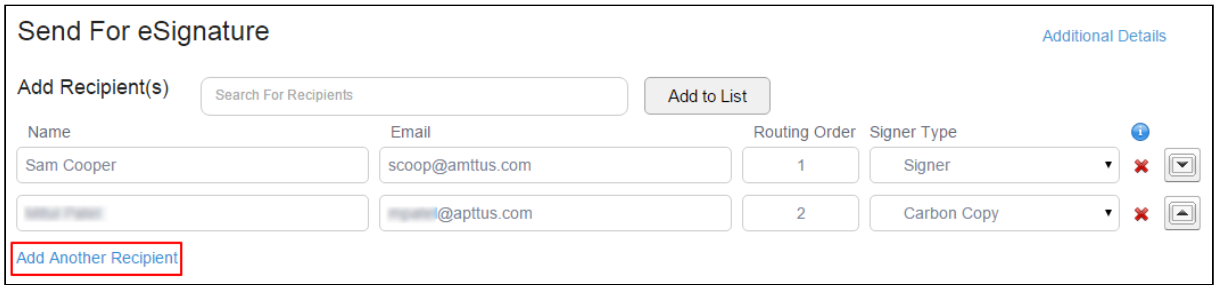
To add new recipient

1. Click **Add Another Recipient**.



2. Enter **Name** of the recipient.
3. Enter **Email Address** of the recipient.
4. Enter **Routing Order** of the recipient.
5. Select **Signer Type** of the recipient.

Field Name	Description
Signer	Select this option if you want your recipient to sign the document.
Carbon Copy	Select this option if you want your recipient to only receive a copy of the document.
In Person Signer	Select this option if you want your recipient to sign the document physically.

6. Select the **Role Name** of the recipient. You can make the tagging order explicit by selecting appropriate role name. For example, you add three users - Sam Cooper, Mike Hanks, and Rex Klenney - in the same order. Now, you want the signing tag of Rex Klenney to be on top of all signers, Sam Cooper's tag to be second, and Mike Hanks as third. For Rex Klenney, select Signer 1; for Sam Cooper, select Signer 2; and for Mike Hanks, select Signer 3. Now, in the document to be signed, the tags will be in the order as Rex Klenney, Sam Cooper, and Mike Hanks.

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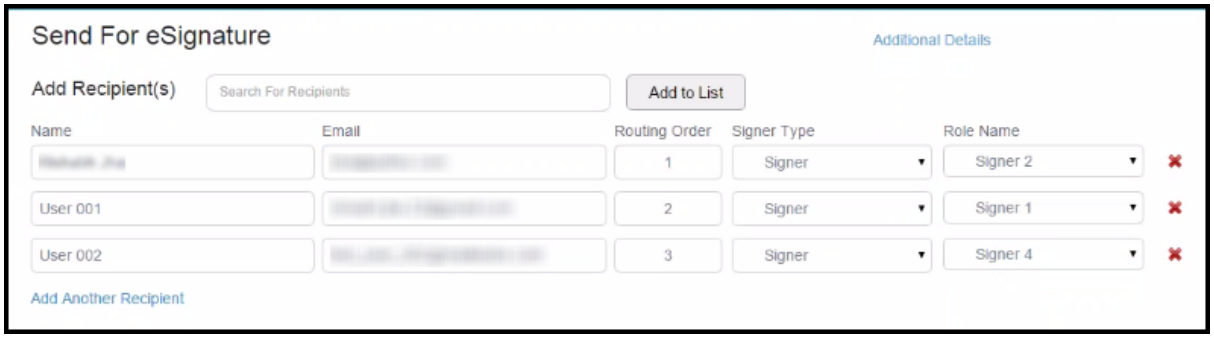
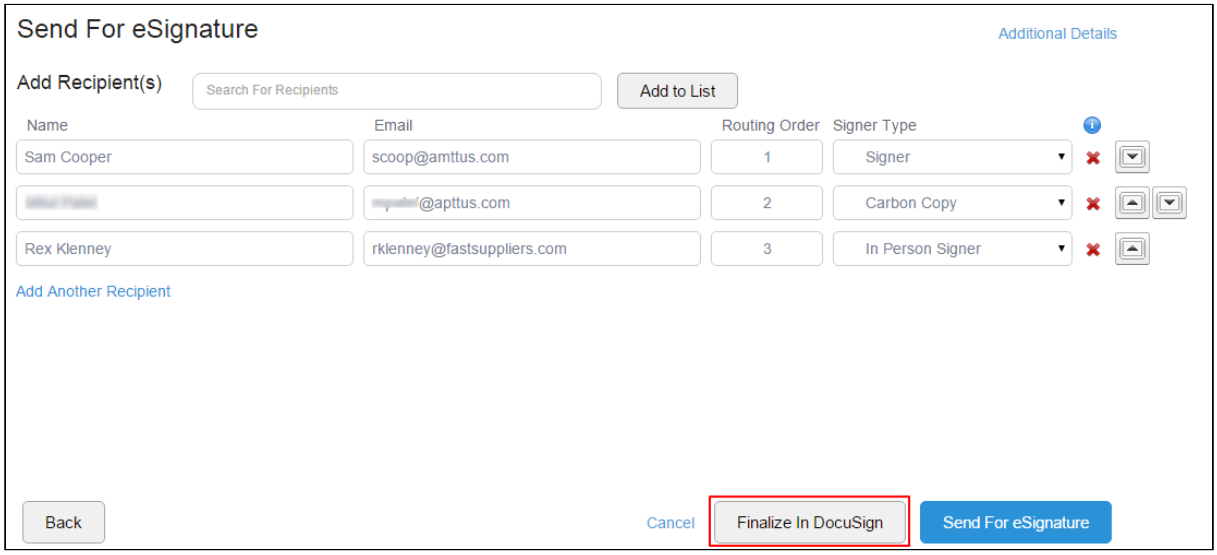
> **Note**
>
> The available options are Signer 1, Signer 2, Signer 3, and Signer 4. If you have more than 4 signers, contact your administrator to add more signers in the role name object.



7. Click **Finalize in DocuSign** to preview your document.
   -or-
   Click **Send for Signature** to directly send the document for signature.



Adding Additional Details

The **Additional Details** page can be found as a link on the top right corner of the eSignature screens. This page contains additional functionality that is supported by DocuSign. This includes fields like Custom Email Subject, Custom Email Body, Email Notifications / Reminders, and Expiration Periods.

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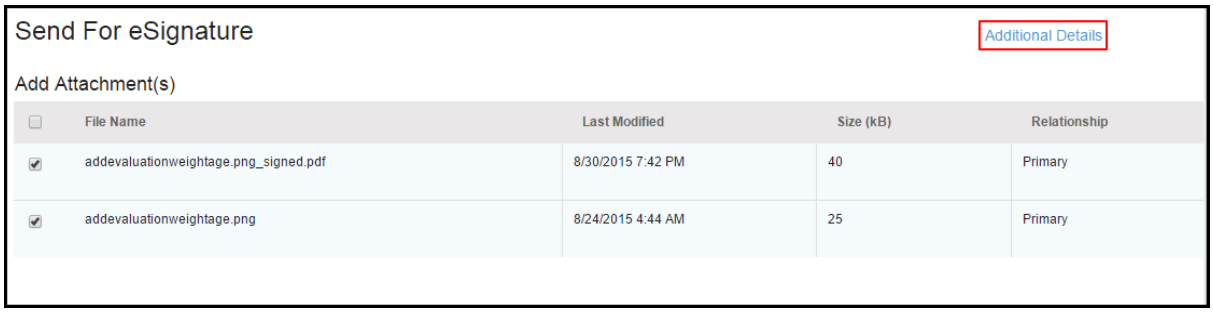
You can now specify the default subject and body for an email that is sent to DocuSign recipient when a document is sent for signature. After you click eSignature button, you can specify the recipients, attachments, and in the additional details section you can edit the email subject and email body to include additional details in the email.

Salesforce merge fields are now supported in the email subject and body. Default text is already added in the Subject and Body fields. Entering a blank email body provides the DocuSign default email message. We recommend that you do not use a blank subject.

To add additional details

1. Click **Additional Details**.



2. Add the Custom Email **Subject** and Custom Email **Message**. The character limit for Subject is 100 characters and 10,000 characters for Message.

> **Note**
>
> The initial value is retrieved from the Custom Labels, the limit is 1000 characters. You can then add more characters in Additional Details screen, if required.

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3. Under Reminders and Expiration section, enter the following fields.

Field	Description
Send a reminder to signers [] day(s) after receipt	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.
Continue to send reminders every [] day(s)	Enter the frequency of reminders in number of days for which you want to send the reminder until the document is signed. For example, you send the document today and you enter the value as 2. A reminder will be sent every 2 days until the signer signs the document.
Expire request in [] day(s); If sent today, it will expire on	Enter the number of days in which you want the request to expire after you send the document. For example, you send the docuemnt today and you enter the value as 365. The envelope will be valid for a year. **Note:** The Expiration Date is displayed after you enter a value in the text box.
Warn signers [] day(s) before request expires	Enter the number of days before which you want to warn the signers about expiration of the document to be signed. For example, you send the document today, the validity of the document is for a year, and you enter value as 10. Hence, a warning of expiration will be sent 10 days before expiration of the document.

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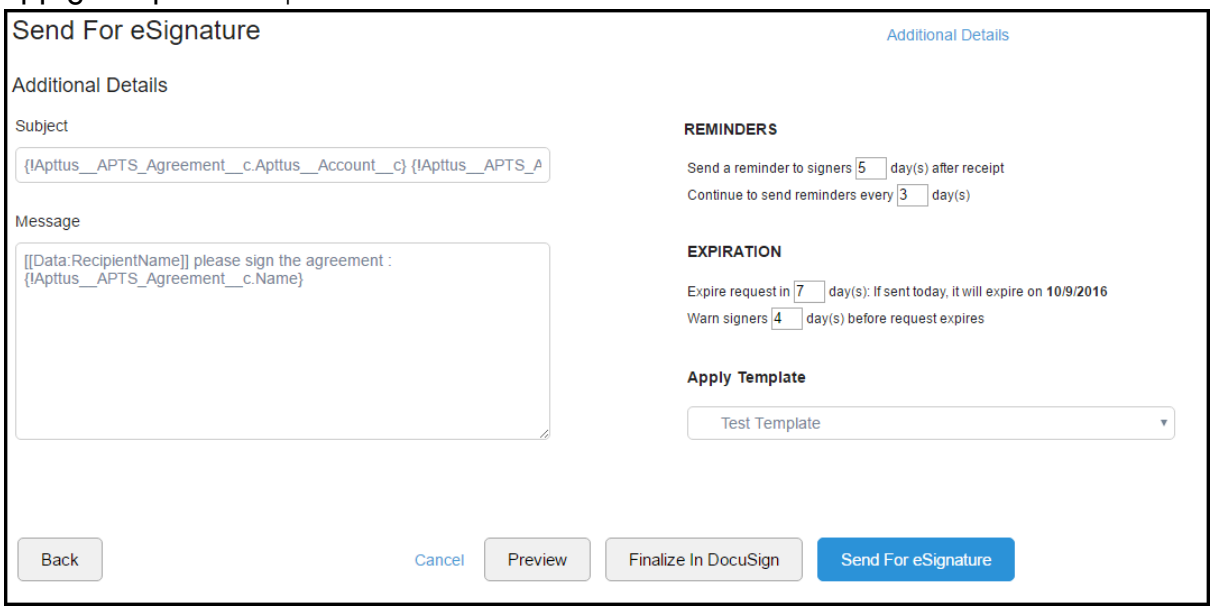
-You'll be able to view the fields pertaining to Reminders and Expiration only if your System Administrator has unchecked the Use Default Reminders & Expiration check box in System Properties. Contact your system administrator if you want to edit the Reminders and Expiration at the Agreement or Quote/ Proposal level.
-If you can view the fields pertaining to Reminders and Expiration and you leave them blank, the default values that have been set by your System Administrator in the DocuSign account will be used.

4. Select the DocuSign template that you want to apply to your envelope from the **Apply Template** drop-down menu.



Note

You can view the Agreement Template drop-down menu only if your System Administrator has enabled the custom setting for you. Contact your System Administrator if you want to access this field.

5. To go back to Add Attachments screen, click **Back**.
-or-To preview the email message with resolved Merge fields, click **Preview**.
-or- To finalize the document in DocuSign, click **Finalize in DocuSign**.
-or- To send the document for eSignature, click **Send for eSignature**.

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Finalizing in DocuSign

Finalize in DocuSign is a feature that allows you to open the envelope inside the DocuSign console. This allows you to use a wider range of functionality provided by DocuSign. One of these features is access to standard DocuSign tags, which can be dragged and dropped onto the document. If this button is not visible, contact your system admin to enable this button in DocuSign System Properties.

If you have not specified an email subject and email body for a recipient in DocuSign Recipient, then the email subject and email body defined at the envelope level, on the Additional Details screen, will be displayed on Finalize in DocuSign page. For detailed information on which email subject and email body are displayed on the Finalize in DocuSign page, refer to the Use Case given below.

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Use Case

Sam wants to send a document for eSignature to Rex Klenney, George Naran, and Michael Ceballos. Sam has added them as recipients and the following configurations have been done.

Name	Email Template Unique Name	Added Email Subject and Email Body on Additional Details page?	Added Email Subject and Email Body in Custom Labels?	Result
Rex Klenney	Tier 1 Legal Template	Yes	Yes	The email subject and email body specified in Tier 1 Legal Template is displayed in Finalize in DocuSign.
George Naran		Yes	Yes	The email subject and email body specified on the Additional Details page is displayed in Finalize in DocuSign.
Michael Ceballos		No	Yes	The email subject and email body specified in the Custom Labels is displayed in Finalize in DocuSign.

To use DocuSign console

1. Click **Finalize in DocuSign**.
   This will open inside DocuSign to edit using the DocuSign Console.
2. You can drag and drop the required tags on your document.

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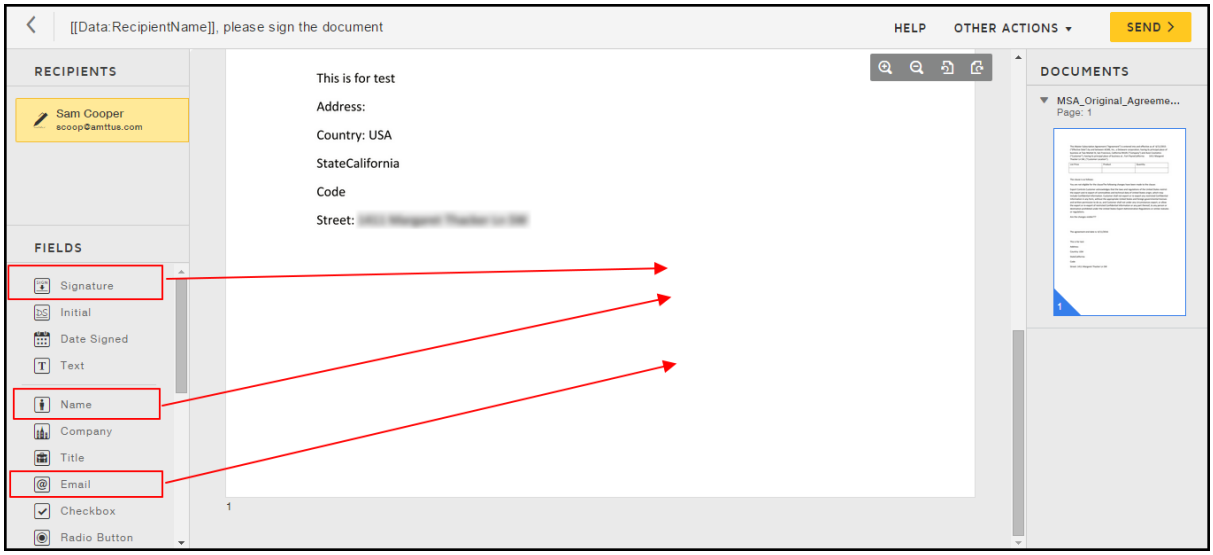

3. If you have more than one recipient, and you want to associate a tag to a recipient; click on recipient's name and drag the appropriate tag to the appropriate place.
4. If you want access any specific page of the agreement, you can quickly scroll through the agreement from the right-side pane of the window named **DOCUMENTS**.
5. If you want to set the notifications and an expiration period on your agreement, click **Other Actions**.
6. Click **Edit Advanced Options**.
7. If you want to set a reminder, select **Send automatic reminders** check box and enter days for which you want to remind your recipient.
8. If you want to set an expiration date for the agreement, enter number of days in the text box under **Expiration**.
9. Click **Save**.
10. Click **Send** to send the document for signature.

Sending the Request

You can send a document for eSignature with all the defaults that are setup. Once you click Send for Signature button, the Apttus connector will skip all other steps and send the document for signature. The Default Recipient, Attachment from the Notes & Attachments related list, and Email Subject and Email Body will be pulled and directly sent for eSignature.

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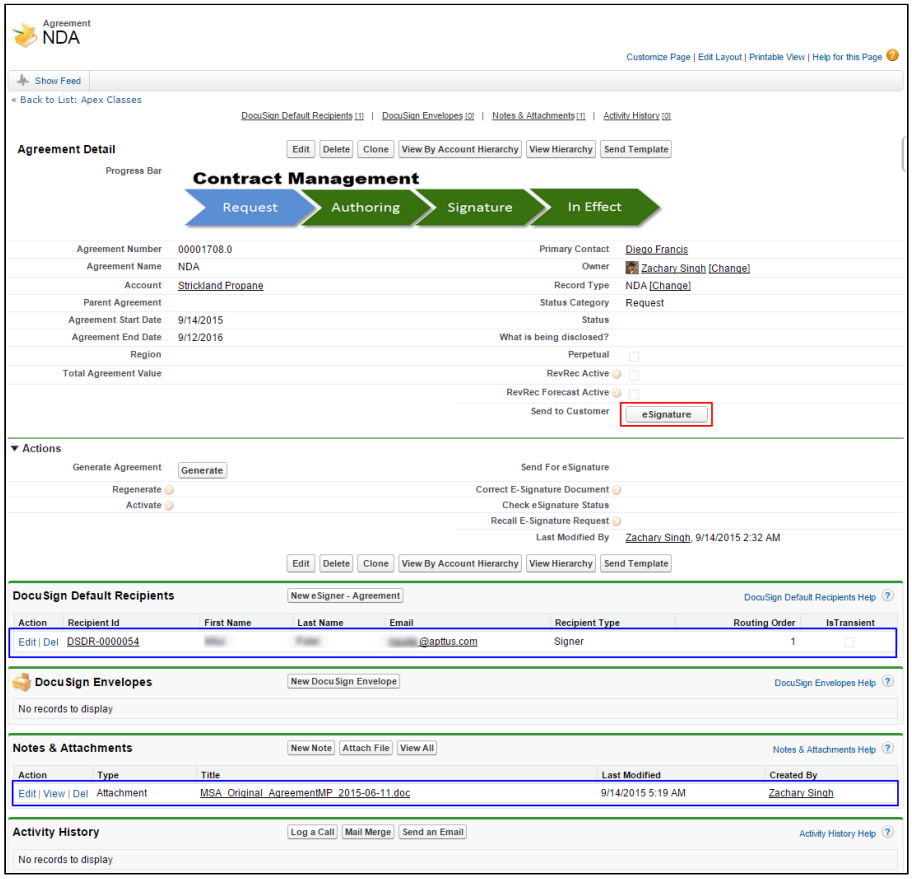
To directly send a document for eSignature

1. Click the **Agreements** tab.
   -or-
   Click the **Proposals** tab.
2. Select the appropriate agreement (or proposal).
3. Click **eSignature.**

> You must have added a Default Recipient in the DocuSign Default Recipient related list and the document to be sent for eSignature must have been added to the Notes & Attachments related list.



4. Click **Send for Signature.**
5. The status of the envelope that was sent is set to **Sent.** The status of the record updates as well. You can view this envelope in the DocuSign Envelopes related list. In case if the custom setting, DocuSign Batch Processing Disabled, is set to true, you

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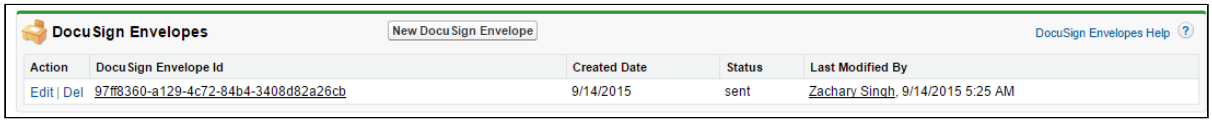
need to manually refresh the browser to see the updated DocuSign Envelope status.



If you get an error displaying the message - Your request could not be completed. Try again or contact your support team, if the error persists, you might want to increase the HTTP Timeout as your REST call is unsuccessful. For more information, refer to FAQs.

If your recipient rejects the document, the Decline Reason will be visible in Activity History related list (if your recipient has entered a reason to decline).

To sign eSignature documents

You must have sent an agreement document for eSignature to a valid recipient.

1. Recipients will receive a DocuSign email containing a link to the document, where they can click View Documents to begin the signing process.

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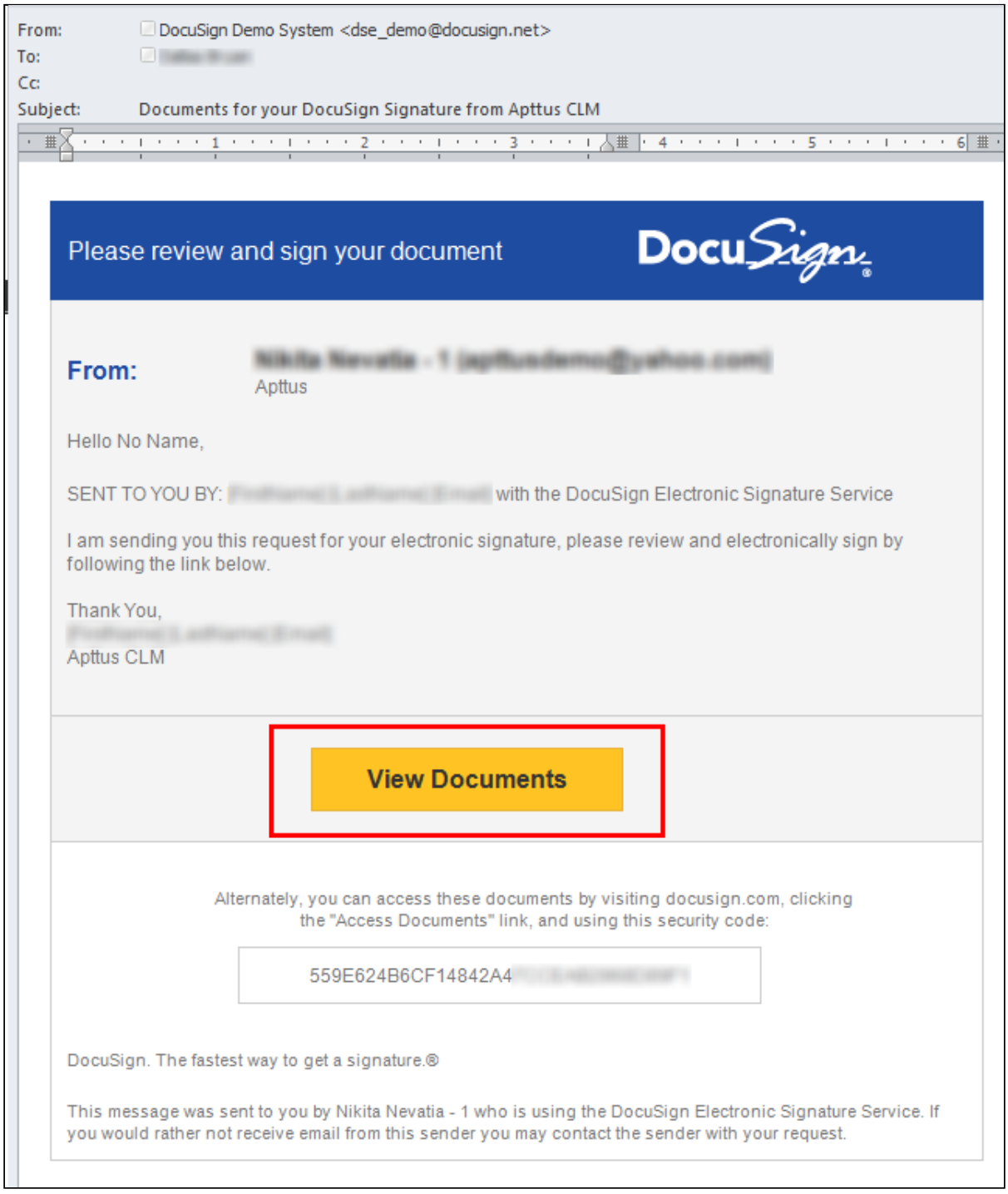

2. Recipients should sign and initial all of the required fields and mark the document as *Confirm Signing* or mark the document as *Complete.*
   If you want to reject the document, enter the Decline Reason and click **Reject.**

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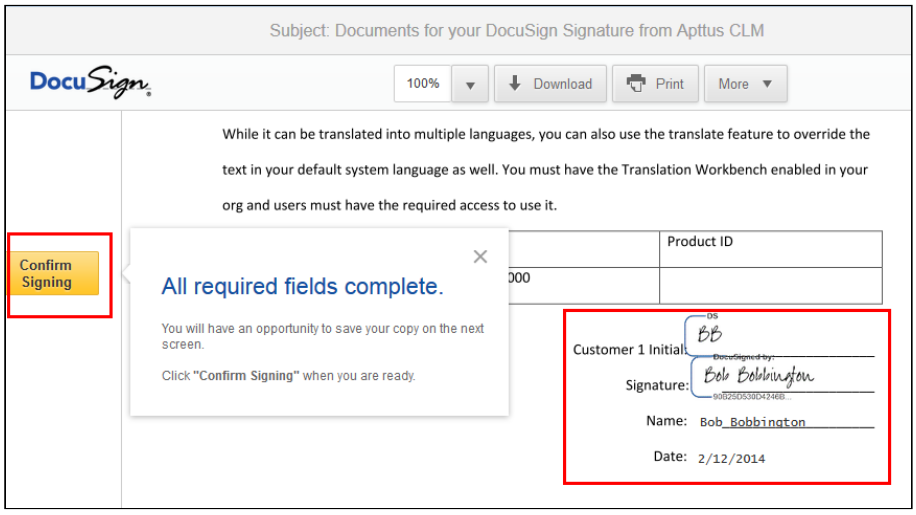

Doing that sends an email to the recipient confirming they have completed their eSignature task and also moves the eSignature process along to the next phase. This could be the next recipient in the queue or could lead to the status being updated for the agreement.

If a sequential order was set using the Order field when sending the document for eSignature, then only a single document (or set of documents) will be sent to recipients who will sign it one at a time. If an order was not set, each recipient will sign separate documents and the order in which they do so does not matter.

Once all recipients have completed their eSignatures, the agreement record **Status** will be updated to **Fully Signed.**

The agreement record can now be progressed to the next stage of the agreement process, which will vary depending on your implementation.

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Sending Documents for Signature with Single-Click

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.

Navigate to **Comply/Proposal System Properties** and select **One Click Send**. When the user navigates to a Quote or an Agreement and clicks eSignature button, the documents in the Notes and Attachments related list is sent to the Default Recipients or Primary Contact configured for that object directly.

While using the one-click signature feature ensure that you have a document added to the Notes an Attachments related list as well as recipients defined in the Default Recipients Related list or a Primary Contact for the Quote or Agreement object.

Once the custom setting has been enabled, the sender can send the envelope from the record. By default, it will take the primary contact, but if the 'Auto Select Multiple Recipients' setting is selected, it will take the recipient sin the DocuSign Default Recipients list. For the attachment, the last modified attachment in the Notes & Attachments will be selected. Once you have the appropriate settings in place, then you can click the eSignature button on the record, which will send the document for signature.

Sending Specific Documents with Single-Click

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

The default text of email subject for the envelopes sent using one click is **Document Signature Required**, and the email body is defaulted to DocuSign's default Email Body text. Recipient level email templates are picked, but merge fields will not be evaluated. So if

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templates are used to define recipient level emails, they should not contain any merge fields.

To send a specific document with single-click using URL

You must ensure that One-Click Send custom setting in System Properties is disabled.

1. Click the **Agreements** tab.
   -or-
   Click the **Proposals** tab.
2. Select the agreement or quote/proposal that you want to send for eSignature.
3. Copy the Agreement ID.
   -or-
   Copy the Quote/Proposal ID.
4. Paste your Agreement ID or Quote/Proposal ID in the following code. You can copy this code in any text editor. Replace your instance url and agreement or proposal id.

```
For Agreements,
https://<your_instance_url>/apex/Apttus_CMDSign__CMDocuSignCreateEnvelope?id=<agreement_id>&oneclick=true

For example,
https://na24.salesforce.com/apex/Apttus_CMDSign__CMDocuSignCreateEnvelope?id=a071a00000CDkTo&oneclick=true

For Proposals,
https://<your_instance_url>/apex/Apttus_QPDSign__QPDocuSignCreateEnvelope?id=<proposal_id>&oneclick=true

For example,
https://na24.salesforce.com/apex/Apttus_QPDSign__QPDocuSignCreateEnvelope?id=a0a1a000001unUi&oneclick=true
```

5. Paste the entire url as mentioned in step 4 in the address bar of your browser. Refer to the image below.

6. Press the Enter key. The document in Notes & Attachments section of the agreement you have selected will be sent to the Primary Contact or DocuSign Recipient. You are

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redirected to Processing eSignature Request screen.

After the document is sent for eSignature, you will be redirected to the Agreement or Proposal screen.

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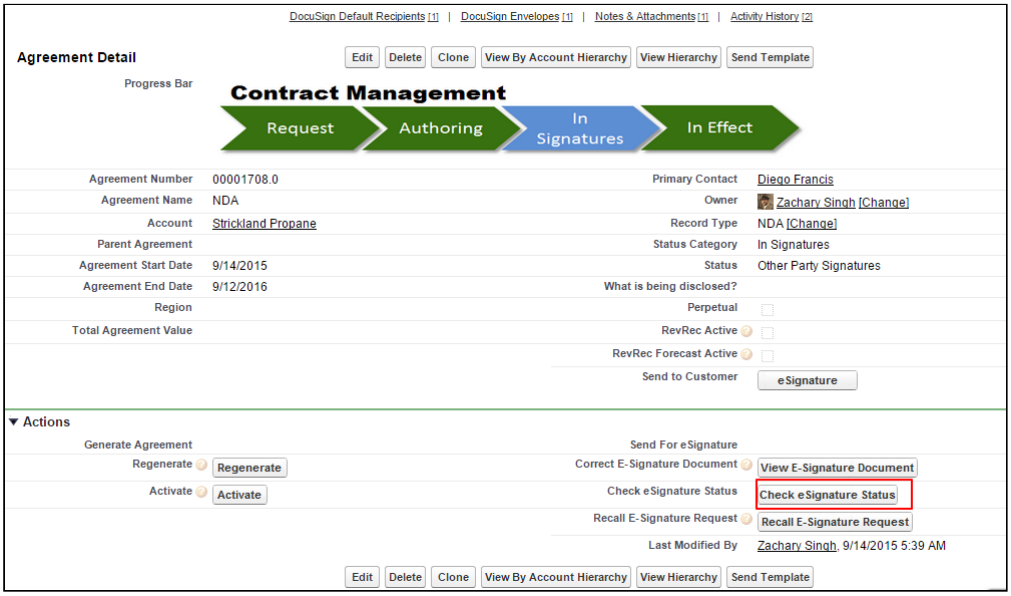
Checking eSignature Status

If you do not click Check eSignature Status, 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.

The DocuSign for Apttus connector allows you to check eSignature status by two ways - Manual and Automatic.

To check eSignature status manually

Progress your agreement record to the point where the Check eSignature Status button is available and click it.



If you do not click eSignature status, the system will automatically update the status, based on the batch job that you have set. Once the documents have been signed and 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 custom tabs are auto-populated.

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.

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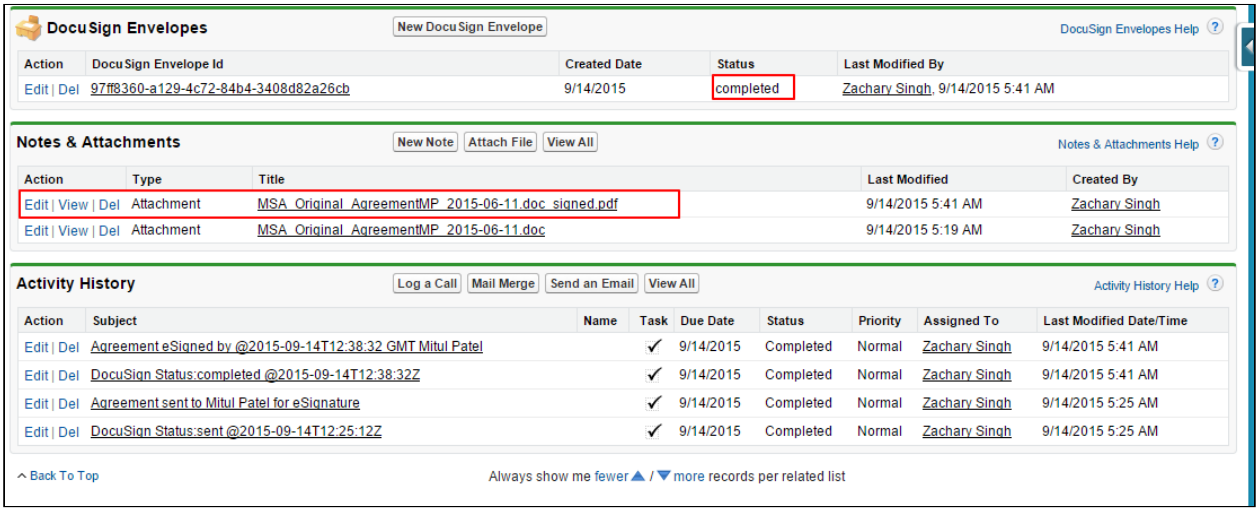
A signed PDF is added to Notes & Attachments related list as well. The status of the DocuSign Envelope is also changed.

The **Agreement Status** of both Parent Agreement and Child Agreement or Sibling Agreement or Related Agreement is updated after the document is signed.



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Recalling eSignature Request

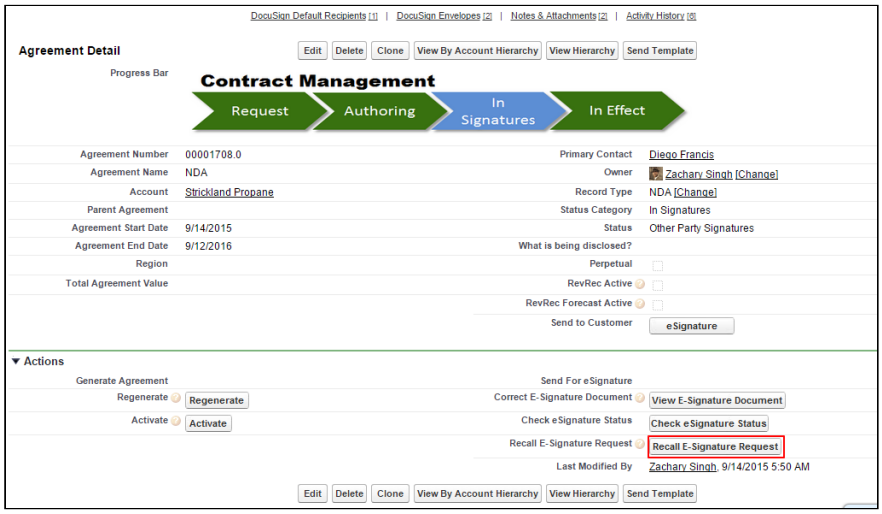
The recall signature feature enables you to recall a signature request after you have sent the document for eSignature. You can view the recall reason in Activity History related list and on the DocuSign Envelope record as well.

Using the recall signature button you can void an envelope even after you have sent an envelope across for signature.

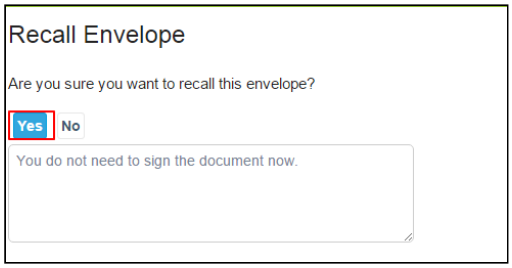
To recall an esignature request:

A signature can be recalled only if an envelope is sent for eSignature. The Recall Signature link should be added to the Agreement and Proposal page layout.

1. Navigate to the Agreement or Proposal for which a request is initiated and from the Detail section, click Recall E-Signature Request.



2. Enter the Recall Reason.
3. Click Yes to recall the envelope. The envelope is recalled successfully.



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Correct eSignature Request

You can correct the document you have sent for eSignature once you send it to a recipient. The **View eSignature Document** button enables you to view the signed document for an agreement or proposal, correct any issues in the document, and then resend it to the intended recipients.

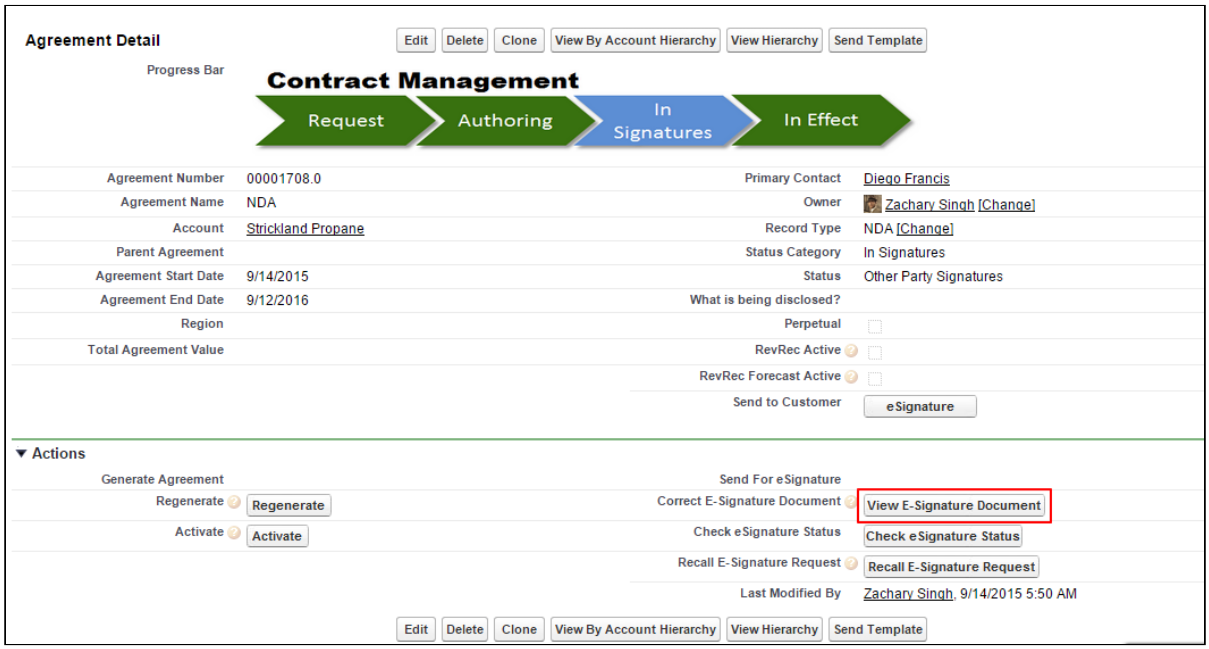
You can check the envelope status for a DocuSign Envelope.

The DocuSign Envelope status related list enables you to correct the following:

- Envelope ID
- Envelope Status which states the overall status of the envelope.

To correct eSignature request

1. Click the **Agreements** tab.
   or
   Click the **Proposals** tab.
2. Select the appropriate agreement or proposal.
3. Click **View E - Signature Document.**



4. Make the appropriate changes in the document. You can add more documents to be signed, add more recipients, and edit the message that is being sent to the recipients.

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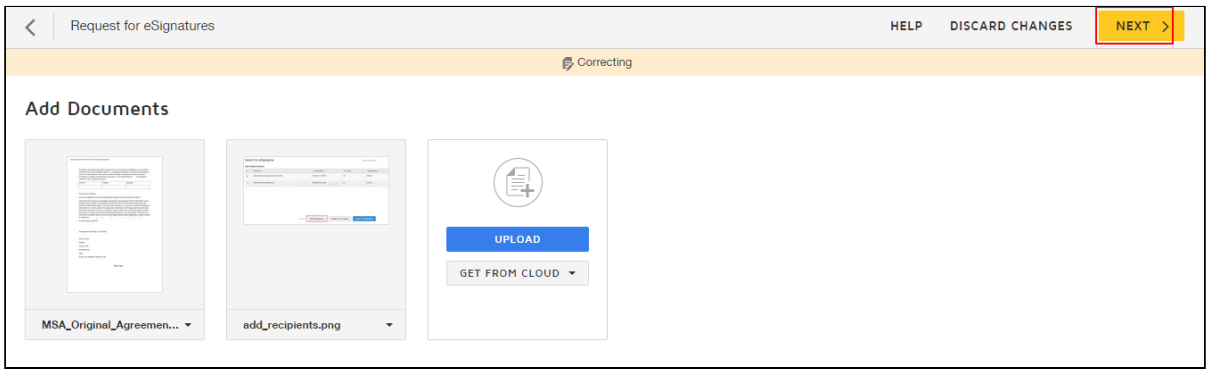
5. Click **Next**.



6. To edit the fields, click **Edit Fields**.
   or
   To resend the envelope to recipients, click **Resend**.

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Viewing Signed Documents

The documents that you send for eSignature, are signed and returned back to your agreement or quote/proposal. The documents will be returned to the related agreement or quote/proposal. This feature can be controlled by **Filter RSPC by Primary Agreement Status** and **Update RSPC Agreement Status** custom settings in Comply System Properties. These system properties work only if **Select Attachments for Related/Sibling** custom setting in Comply System Properties is enabled. The Agreement Status of both Parent and Child Agreement will be updated after the documents are signed. For example, if you have a Primary Agreement and it has a Child Agreement; you send both agreements for signature. Once signed, the agreements are then returned to the related agreements in Notes & Attachments section.

The signed documents are then stored in **Notes & Attachments** section of that agreement or quote/proposal.

For more information on the custom settings, refer to Comply System Properties.

For a clear understanding on how the custom settings work, refer to the following use case.

Primary Agreement Sent for Signature	Contains a Child/Related/ Sibling Agreement	Filter RSPC by Primary Agreement Status checked?	Update RSPC Agreement Status	Result
Yes	Yes	Yes	Yes	A user sends an agreement which contains an agreement from Related Agreements as well. Once the recipient signs both documents, Agreement Status will reflect Fully Signed. These activities are reflected in Activity History.

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Primary Agreement Sent for Signature	Contains a Child/Related/ Sibling Agreement	Filter RSPC by Primary Agreement Status checked?	Update RSPC Agreement Status	Result
Yes	No	Yes	Yes	A user sends a primary agreement which does not contain any other agreement. Once the recipient signs the document, Agreement Status will reflect Fully Signed. These activities are reflected in Activity History. Related Agreements associated to the primary agreement will not be affected.
Yes	Yes	Yes	No	A user sends an agreement which contains an agreement from Related Agreements as well. Once the recipient signs both documents, Agreement Status will reflect Fully Signed. These activities are reflected in Activity History. The Agreement Status of related agreements associated to the primary agreement will not be affected.

In case of recall of a document, the Agreement Status is updated to Ready for Signatures and then updated to Fully Signed after the document is signed.

To view a signed document

1. Click the **Agreements** tab.
2. Select the agreement that you want to view.

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3. Navigate to Notes & Attachments related list, and select the agreement with suffix **.signed** to view the signed agreement.

For demo purpose, we have selected an agreement. You can perform same steps for Quote/ Proposal by navigating to Proposals tab.

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FAQs

This section contains the frequently asked questions. It also provides the solution to frequently occurring errors.

I am getting a Timeout Error.

When you send a document out for signature, you would sometimes not receive an email or would be taken back to the agreement screen with no visible change; the tags would not show up properly; you might get a locked template error.

This error is diagnosed in the debug log as a **Locked Template** error.

This error occurs when the server takes long time to respond, meanwhile, the other REST calls would keep on trying; causing the lock on the template.

Solution: Increase the HTTP Timeout time by performing the following steps.

Go to **Setup > Develop > Custom Settings > DocuSign System Properties** and click **Edit**.

In **HTTP Timeout**, enter 30,000.

> **Note**
>
> You can enter any value from 30,000 to 120,000 as 120,000 is the SFDC limit for setting the Timeout Time.

I am getting a System Error displaying the message: Your request could not be completed. Try again or contact your support team, if the error persists.

When you send a document out for signature, you might get a System Error displaying the following message: Your request could not be completed. Try again or contact your support team, if the error persists.

This error occurs when the REST Call was unsuccessful in being processed by the DocuSign server and could be due to multiple reasons like locking of template, signing issues,or timeout error.

Solution: Ask your system admin to view the Apex Jobs and determine the issue.

In order to access the Apex Jobs, go to **Setup > Monitor > Jobs > Apex Jobs** and view the job that was aborted.

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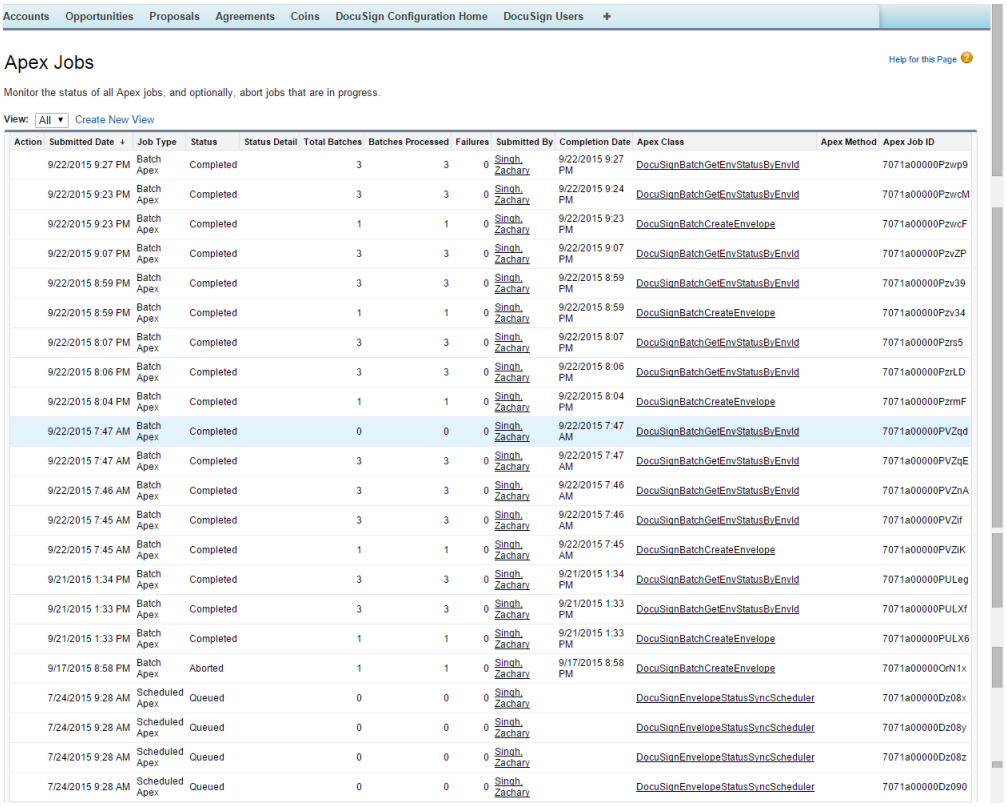

Accounts Opportunities Proposals Agreements Coins DocuSign Configuration Home DocuSign Users +

Apex Jobs

Help for this Page

Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

View: All Create New View

Action	Submitted Date ↓	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class	Apex Method	Apex Job ID
	9/22/2015 9:27 PM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/22/2015 9:27 PM	DocuSignBatchGetEnvStatusByEnvId		7071a00000Pzwp9
	9/22/2015 9:23 PM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/22/2015 9:24 PM	DocuSignBatchGetEnvStatusByEnvId		7071a00000PzwcM
	9/22/2015 9:23 PM	Batch Apex	Completed		1	1	0	Singh, Zachary	9/22/2015 9:23 PM	DocuSignBatchCreateEnvelope		7071a00000PzwcF
	9/22/2015 9:07 PM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/22/2015 9:07 PM	DocuSignBatchGetEnvStatusByEnvId		7071a00000PzvZP
	9/22/2015 8:59 PM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/22/2015 8:59 PM	DocuSignBatchGetEnvStatusByEnvId		7071a00000Pzv39
	9/22/2015 8:59 PM	Batch Apex	Completed		1	1	0	Singh, Zachary	9/22/2015 8:59 PM	DocuSignBatchCreateEnvelope		7071a00000Pzv34
	9/22/2015 8:07 PM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/22/2015 8:07 PM	DocuSignBatchGetEnvStatusByEnvId		7071a00000Pzrs5
	9/22/2015 8:06 PM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/22/2015 8:06 PM	DocuSignBatchGetEnvStatusByEnvId		7071a00000PzrLD
	9/22/2015 8:04 PM	Batch Apex	Completed		1	1	0	Singh, Zachary	9/22/2015 8:04 PM	DocuSignBatchCreateEnvelope		7071a00000PzrmF
	9/22/2015 7:47 AM	Batch Apex	Completed		0	0	0	Singh, Zachary	9/22/2015 7:47 AM	DocuSignBatchGetEnvStatusByEnvId		7071a00000PVZqd
	9/22/2015 7:47 AM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/22/2015 7:47 AM	DocuSignBatchGetEnvStatusByEnvId		7071a00000PVZqE
	9/22/2015 7:46 AM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/22/2015 7:46 AM	DocuSignBatchGetEnvStatusByEnvId		7071a00000PVZnA
	9/22/2015 7:45 AM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/22/2015 7:46 AM	DocuSignBatchGetEnvStatusByEnvId		7071a00000PVZif
	9/22/2015 7:45 AM	Batch Apex	Completed		1	1	0	Singh, Zachary	9/22/2015 7:45 AM	DocuSignBatchCreateEnvelope		7071a00000PVZiK
	9/21/2015 1:34 PM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/21/2015 1:34 PM	DocuSignBatchGetEnvStatusByEnvId		7071a00000PULeg
	9/21/2015 1:33 PM	Batch Apex	Completed		3	3	0	Singh, Zachary	9/21/2015 1:33 PM	DocuSignBatchGetEnvStatusByEnvId		7071a00000PULXf
	9/21/2015 1:33 PM	Batch Apex	Completed		1	1	0	Singh, Zachary	9/21/2015 1:33 PM	DocuSignBatchCreateEnvelope		7071a00000PULX6
	9/17/2015 8:58 PM	Batch Apex	Aborted		1	1	0	Singh, Zachary	9/17/2015 8:58 PM	DocuSignBatchCreateEnvelope		7071a00000OrN1x
	7/24/2015 9:28 AM	Scheduled Apex	Queued		0	0	0	Singh, Zachary		DocuSignEnvelopeStatusSyncScheduler		7071a00000Dz08x
	7/24/2015 9:28 AM	Scheduled Apex	Queued		0	0	0	Singh, Zachary		DocuSignEnvelopeStatusSyncScheduler		7071a00000Dz08y
	7/24/2015 9:28 AM	Scheduled Apex	Queued		0	0	0	Singh, Zachary		DocuSignEnvelopeStatusSyncScheduler		7071a00000Dz08z
	7/24/2015 9:28 AM	Scheduled Apex	Queued		0	0	0	Singh, Zachary		DocuSignEnvelopeStatusSyncScheduler		7071a00000Dz090

After I send the document for eSignature, the status of record will not update automatically.

Once you send the document for eSignature, the status of the record can take a little longer to update and may require a page refresh.

How do I know the format for a Salesforce merge field when editing the email?

You can go to the Email Templates in Salesforce and use their template creation as a way of finding the field's merge field syntax. It will allow you to choose the object and field to generate the merge field.

Which file formats are supported while sending the document for eSignature?

The following formats are supported while sending a document for signature:

DOCX, DOC, PDF, RTF

I am missing the "_____" button

Buttons in the eSignature screens are exposed through the custom settings and need to be set by the admin. Button on the record are exposed via the page layout editor.

Can I filter the attachments that are displayed on the Add Attachments page?

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Yes, you can filter the attachments that are displayed on the Add Attachments page.

DocuSign for Apttus Connector provides an option to pass a list of attachment ids (CSV) as a parameter. The parameter name is **documentIdsCsv.**

You have to create a custom formula field on the Agreement / Proposal object that redirects to Apttus' Select Attachment page and passes the document ids to it in the parameter, and use the formula field for sending the document(s) for eSignature.

How do I implement Get Custom Tabs and Set Custom Tabs Callback Classes?

When you send the documents for eSignature, you can 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.

In order to perform such activities, you must implement callback classes.

You must perform the following steps to implement the classes.

1. Add **Custom Fields** to the DocuSignDefaultRecipient2_c object.
   For more information on adding custom fields, refer to Adding Custom Fields.
2. Create the **Custom Tags** in DocuSign account.
   For more information on creating custom tags, refer to Creating DocuSign Tags.
3. Create the **Template** with the appropriate Custom Tags.
   For more information on creating templates, refer to Creating Templates.
4. Add the classes under **Apex Classes**.
   a. Go to **Setup > Build > Apex Classes** and click **New**.
   b. Enter the code of API.
   c. Click **Save**.
   For Sample Code ofGet Custom Tabs and Set Custom Tabs, refer to Custom APIs.
5. Ensure that **DocuSign Custom Classes** in System Properties has the callback class names populated with appropriate class names.
   a. Go to **Setup > Build > Custom Settings** and click **Manage** for DocuSign Custom Classes.
   b. Click **New**.
   c. Enter **Name**.
   d. Enter the name of **Add Recipient Tabs Callback Class** and **Return Recipient Tabs Callback Class**.
   e. Click **Save**.
6. Ensure that **Recipient Tabs Enabled** in DocuSign System Properties is selected.
   a. Go to **Setup > Build > Custom Settings** and click **Manage** for DocuSign System Properties.
   b. Click **Edit** for System Properties.
   c. Select **Recipient Tabs Enabled** check box.
   d. Click **Save**.

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After I send the document for eSignature, the Status of Envelope is blank.

Once you send the document for eSignature, the status of the envelope that is sent gets updated.

The status of envelope can be checked in two ways - Manual or automatic.

To check the status of envelope sent(manually),

1. Click **Agreements** tab.
   If you are using DocuSign with Quote/ Proposal, Click **Proposals** tab.
2. Select the appropriate agreement (or Proposal).
3. Click **Check eSignature Status**.

The Envelope Status of all the envelopes will be updated.

In order to update the status of envelope sent automatically, your system admin must set up batch jobs.

Can I use Auto-Provisioning with One Click Send?

No, you can not use Auto-Provisioning with One Click Send.

I cannot drag and drop the DocuSign Tags in Finalize in DocuSign.

If you are not able to drag and drop the DocuSign tags you may want to try one of the following.

- Add a Recipient in the envelope.
- Review the permissions to add tags in Send or Correct View. Contact your System admin in case you do not have permissions to add tags.

I logged in through the DocuSign Configuration Home tab, but still the sender's name is different than mine.

When you login through the DocuSign Configuration Home tab, you are one of the DocuSign Users.

Solution: You must delete extra record of the users from the DocuSign Users.

1. Click the **DocuSign Users** tab.
2. Select the user that you want to delete.
3. Click **Delete**.

When I login to DocuSign Account in Salesforce org, i get an error displaying the following message: There is an issue with my DocuSign User Account Information (Login / Password).

When you login to DocuSign User Account through DocuSign Configuration Home, you might get an error displaying the following message: There is an issue with my DocuSign User Account Information (Login / Password).

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Soultion: There are several potential solutions to this error when attempting to add a new DocuSign User.

1. Verify the Credentials
2. Verify the Remote Site Settings
3. Verify DocuSign System Properties

1. **Verify the Credentials**
   The credentials that are being added must match exactly to the credentials used to login to the DocuSign website. The best approach is to first open the DocuSign website and login, noting the Username and Password. Once logged in the DocuSign successfully go to the upper right dropdown in DocuSign typically under the User image (next to Help) and locate the DocuSign Account ID. Take this information and create the DocuSign User in Salesforce.

2. **Verify the Remote Site URL**
   Remote Site Settings allow outbound access to DocuSign location.
   a. Go to **Setup > Administer > Security Controls > Remote Site Settings**.
   b. If there is no entry for DocuSign Server, then add an appropriate entry by clicking **New Remote Site**. If you are using NA2, then add enter Remote Site URL as https://na2.docusign.net. If you are using DEMO, then enter Remote Site URL as https://demo.docusign.net.
   c. Click **Save**.
3. **Verify DocuSign Environment**
   DocuSign has several environments (DEMO, PROD, NA1, NA2, EU1) it is important that the correct environment is listed in the DocuSign System Properties. You may need to verify with DocuSign support which environment you are currently using before proceeding with the next steps.
   a. Go to **Setup > Build > Develop > Custom Settings** and click **Manage** for DocuSign System Properties.
   b. Click **Edit** for System Properties.
   c. Add the appropriate value for Production Server Pod of your environment. For example, DEMO, PROD, NA1, NA2, EU1 and many more.
   d. Click **Save**.

Why do I see a large number of DocuSign scheduled items the first time the DocuSign scheduled jobs are created?

The scheduled batch job pulls all the envelopes from the DocuSign account that is configured in the Salesforce Org since its last synchronized time. If this is the first time the

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scheduled batch jobs have been run then you may see a large number of items that need to be synchronized.

Each envelope that was created can have up to 5 associated batches that need to be run during the scheduled job as described below.

1) One for getting the envelope status
2) One for getting the recipient status
3) One for getting the signed document
4) One for updating the envelope status on the Salesforce object
5) One for updating the recipient status on the Salesforce object

Therefore, potentially if 100 envelopes were created prior to the DocuSign scheduled jobs, the first time the scheduled job is run it may show up to 500 batches being processed.

How do I create a Template using DocuSign Tags?

For information on creating templates using DocuSign Tags, refer to Configuring DocuSign Tags.

The scheduled batch job is not updating the status or is failing.

If the scheduled batch job is not updating the status or is failing, then you should check the batch jobs.

To check the scheduled batch jobs, go to Setup > Monitor > Jobs > Apex Jobs and navigate to DocuSignBatchGetEnevelopeStatus batch job.

If you get an error as shown in the following table, it is because the batch job is kicking off the first time (or after a long time), and is trying to query a large number of envelopes; and, it is not able to process all the records because the Salesforce heap size is limited to 12 MB.

Job Type	Status	Status Detail	Apex Class
Batch Apex	Failed	First error: Apex heap size too large: XXXXXXX	DocuSignBatchGetEnevelopeStatus

Solution: Perform the following steps.

1. Delete the currently scheduled DocuSign batch jobs.
2. Click the **DocuSign Users** tab.
   a. Select the appropriate user and click **Edit**.
   Note: You must have only one relevant user as the DocuSign User.
   b. Select **COMPLETE** from the CurrentSyncJobState picklist menu.

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c. Set the **Last Sync Completed Envelope** Time field to a date-time value which is not too far back in past. For example, if today is 8/27/2015, then set the date-time value to 8/25/2015 11:00 PM.

3. Reschedule the batch jobs.
   a. Go to **Setup > Build > Develop > Pages** and select **Batch Job Setup**.
   b. Click **Preview**.
4. Wait for the next batch run and see if it completes.

Can I send multiple documents for signature together?

Yes, you can send multiple documents from the same record for eSignature together.

Can I have defaulted recipients? Multiple defaulted recipients?

You can default recipients by doing one of the following.

- Use Defaulted API specified contact field.
- Use DocuSign Default Recipients related list to specify recipients.

When installing into Production where users are already set up in the DocuSign Admin tab, what configuration needs to be done in the Apttus managed package to ensure that all users sending through the connector are going through our production DocuSign environment?

On DocuSign System Properties, there is a check-box**Production Environment?** Selecting this check-box, we will ensure that the connector sends to the DocuSign Production Server.

DocuSign wants to copy over attachments to a custom object and route eSignature from there. Does the Apttus connector supports sending documents for eSignature from a custom object?

Currently, DocuSign does not support this feature.

Is there a way to customize the email text that is sent via the Send for eSignature button?

Yes, you can customize the email text the email text that is sent via the **Send for eSignature** button.

It can be done using EmailBodyText option under the Custom Labels.

Go to **Setup > Build > Create > Custom Labels** and select EmailBodyText.

Click **Edit** and modify the Translation to the customized text that you want as your email body.

Can I remove the Finalize in DocuSign button?

Yes, you can remove the **Finalize in Docusign** button.

Go to **Setup > Build > Develop > Custom Settings** and click **Manage** for DocuSign System Properties.

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Click **Edit** for System Properties.

Deselect **View in DocuSign Enabled** check box.

Can I hide the Finalize in DocuSign button conditionally based on User/ Profile?

No, you cannot hide the **Finalize in DocuSign** button based on User / Profile.

Is it possible to customize the emails sent to the recipient? 2 different templates for e-signature/manual signature?

Currently, this feature is not available. It might be available in one of our future releases.

Is it possible to attach documents not to be signed by the recipient (sending the contract + documents for information)?

Yes, you can attach documents from Notes & Attachments related list and specify the documents to be signed. You need to specify by adding DocuSign tags to the documents you want signed.

Is the recipient the signatory or is it possible to forward the contract for e-signature to someone else?

The recipient is the person you send the email to. DocuSign does allow you to forward to a different person to sign the document.

Is there smartphone support for e-signature?

Currently we support One Click Send. However, other additional features might be available in our future releases.

Is it possible to copy any recipient?

Yes, there is a recipient type called "Carbon Copy" which allows you to send a copy of the document to recipients. This does not mean that they automatically get the copy once it has been signed completely. This means you can specify a recipient to get a copy, and you choose when they would get the copy (get it after the first signer signs, get after everyone has signed).

What about the reply from the recipient – if the recipient has signed via e-signature, is there an email sent to all recipients or only to ALE signatory? Are the other people still copied? Is it possible to decide who will receive the contract duly signed by the recipient?

Only the user that has signed the document will get an email. Once everyone has signed, the sender will receive an email. If you want other recipients to receive a copy after it has been signed by the last recipient, then you need to add them as Carbon Copy recipients after the last signer. Only the sender will receive the final signed document by default.

Can you use non-Contact fields as Default DocuSign recipients?

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You cannot use a field on the agreement record that is not a contact field. But emails can be added under the DocuSign Default Recipients related list.

Can you have different templates for different countries or regions?

You can edit the main email template through Setup. And you can select **Add Additional Details** to modify the email when sending for signature each time, but there no option for multiple email templates at this time.

Is it possible to include an e-signature block for initials on each page of a contract document similar to a footer that does not require this to be manually added to each page?

You need to manually add the initial tag into the template footer either when you create the template, or when you use Finalize in DocuSign.

What is the process for sending a revised document (for example, to correct a typo) after a recipient has signed and returned the submitted version?

That's dependent on their workflow. Out of the box, it follows the usual contract business flow where after the contract has been signed the button disappears and you can now activate the agreement. You can customize your flow so that the button does not disappear or reappear based on a certain status so you can send for signature when you require it.

Behavior of Include Certificate custom setting

Include Certificate custom setting works in combination with **Retrieve as a Combined Document** custom setting. Refer to the following table to learn more about the behavior. To enable this feature, at least one attachment must be attached in the Notes & Attachments section. And, one recipient must be added to DocuSign Recipients related list.

Scenario	Include Certificate checked?	Retrieve as a Combined Document checked?	Attach Certificate of Completion to the EnvelopePDfchecked? (In DocuSign Account)	Behavior
Scenario 1	Yes	Yes	Yes	Admin receives the final signed PDF with the last page containing the DocuSign Certificate of Completion.

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Scenario	Include Certificate checked?	Retrieve as a Combined Document checked?	Attach Certificate of Completion to the EnvelopePDfchecked? (In DocuSign Account)	Behavior
Scenario 2	Yes	No	No	Admin receives the final signed PDF and Certificate of Completion both as separate document.
Scenario 3	Yes	Yes	No	Admin receives the final signed PDF but the certificate of Completion is not received.

How do I enable the Attach Certificate of Completion to the Envelope PDF setting in DocuSign Account?

To enable the Attach Certificate of Completion to the Envelope PDF setting in DocuSign account,

1. Click the User Menu and select **Preferences**.
2. Under Account Administration, select **Features**.
3. Select the **Attach the Certificate of Completion to the Envelope PDF** check box.
4. Click **Save**.

How can I disable the users from configuring recipients and attachments?

Add Attachments Enabled and Add Recipients Enabled custom settings control the configurations of recipients and attachments. Refer to the following table to learn more about the behavior. To enable this feature, at least one attachment must be attached in the Notes & Attachments section. And, one recipient must be added to DocuSign Recipients related list.

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Scenario	Add Attachments Enabled checked?	Add Recipients Enabled checked?	Behavior
Scenario 1	No	No	The user will not be able to add any new attachments. The user will not be able to add or configure recipients.
Scenario 2	Yes	No	The user will be able to add or select attachments. The user will not be able to add or configure recipients.
Scenario 3	No	Yes	The user will not be able to add or select attachments. The user will be able to add or configure recipients.
Scenario 4	Yes	Yes	The user will be able to add or select attachments. The user will be able to add or configure recipients.

Why do I see the processing screen for a long time, when I send a document for eSignature using the Send for eSignature button or Finalize in DocuSign button?

You might see the processing screen for a long time,when you send a document for eSignature. This screen may never resolve.

Reason: This can be due to a high number of batch processes going on in your org. After sending the document for eSignature, the Apex Jobs in Setup will display if the batch job is in **Holding** status. If it is, then it is attributed to a Salesforce known issue concerning queue size and the number of batches running.

For more information, refer to https://success.salesforce.com/issues_view?id=a1p300000008YgIAAU.

For One-Click Send, which Email Subject and Body text is used?

The default text of email subject for the envelopes sent using one click is **Document Signature Required**,and the email body is defaulted to DocuSign's default Email Body text.

Which Email Templates are used for One-Click Send? Can I use Merge Fields in my Email Templates for One-Click Send?

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Recipient level email templates are picked, but merge fields will not be evaluated. So if templates are used to define recipient level emails, they should not contain any merge fields.

Which custom setting should I select if I want to select all the attachments on the Add Attachments page, by default?

In order to automatically select all the documents on the Add Attachments page, you must select the Select All Attachments custom setting in Comply System Properties or Proposal System Properties, depending on which package have you installed DocuSign for.

Select All Attachments custom setting and **Select First Document Default** custom setting can affect your result. For a clear understanding, refer to the Scenario table below.

Select First Document Default checked? (System Properties)	Select All Attachments checked? (Comply System Properties / Proposal System Properties)	Result
Yes	Yes	All the documents on the Add Attachments page are auto-selected.
Yes	No	Only the first document on the Add Attachments page is auto-selected.
No	Yes	All the documents on the Add Attachments page are auto-selected.
No	No	None of the documents on the Add Attachments page are auto-selected.

How do I customize the signing experience of different types of agreements by using different types of branding?

DocuSign for Apttus now enables you to associate a different brand for different types of agreements. You can customize the signing experience for recipients based on the agreement factors. You can pass the Brand Id using a new parameter called brand. If you

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do not pass any brand Id, the system will send the document with the default brand associated with the account.

Note: We are documenting the steps for Apttus Agreements object here. You can perform the same steps for Apttus Proposals as well.

For example, you have different brands associated with different types of agreement. You want to send documents with different look and feel. You can associate different Brand Ids with different types of agreements in order to do so.

You must perform the following steps in order to send the document for eSignature

To send documents for eSignature with a specific Brand ID

1. Login to your DocuSign account.
2. Click the User Profile and select **Preferences**.
3. Click **Branding**. Create new branding with new colors and images as per your business requirements.
4. Copy the Brand Id from branding.
5. Create a new button on the Agreement object by copying existing button and applying parameter.
    a. Go to **Setup > Build > Create > Objects** and select **Agreement** (Installed Package: Apttus Contract Management).
    b. Under Custom Fields & Relationships related list, click **New**.
    c. Select **Formula** radio button and click **Next**.
    d. Enter the **Field Label** as Send for eSignature.The Field Name will be auto-populated.
    e. Select **Text** as Formula Return Type.
    f. Click **Next.**
    g. In the formula editor, enter the following formula.

```
IF( OR( ISPICKVAL(Apttus__Status_Category__c,"In
Authoring"), (AND(ISPICKVAL(Apttus__Status_Category__c,"In
Signatures"), ISPICKVAL(Apttus__Status__c,"Ready for
Signatures")  )), (AND(ISPICKVAL(Apttus__Status_Category__c,"In
Signatures"), ISPICKVAL(Apttus__Status__c,"Signature
Declined") ) ) ), HYPERLINK("/apex/
Apttus_CMDSign__CMDocuSignCreateEnvelope?brand=ee5bf510-7070-4931-
a1f8-2823da145b1b&id="&Id, IMAGE("/resource/Apttus_DocuApi__eSignature","S
end For eSignatures"), "_self"), NULL )
```

6. Send your document using new button.

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