



# DocuSign Services



# Table of Contents

DocuSign Services Release Notes.....	6
Spring '21 Release Notes .....	6
Packages.....	6
System Requirements and Supported Platforms.....	7
New Features.....	8
Enhancements.....	8
Data Model Changes.....	9
Resolved Issues .....	9
Known Issues .....	9
Spring21.03.25 Release Notes.....	9
About DocuSign Services .....	13
Key Terminology .....	14
What's New in DocuSign Services.....	16
DocuSign Services for Administrators .....	17
Overview.....	17
Document Overview .....	18
Setting Up DocuSign Services.....	19
Pre-Installation Requirements .....	19
Installing DocuSign Packages.....	20
Upgrading DocuSign Services .....	23
Post-Installation Configuration .....	26
Configuring DocuSign Services .....	65
Configuring DocuSign Tags.....	65
Configuring Templates .....	67
Adding Custom Fields to the Envelope.....	73
Configuring Signer Roles .....	81
Configuring Signer Groups .....	83
Configuring Reminders and Expiration .....	86
Configuring One-Click Send for Specific Envelopes.....	91

DocuSign Objects .....	92
DocuSign Services for Users.....	94
Getting Started .....	94
Logging into DocuSign Services .....	94
Proposals and Agreements.....	95
Pre-requisites.....	95
DocuSign Account .....	95
Post-Installation Configuration .....	96
Adding an Attachment .....	97
Adding a Recipient .....	97
eSignature Request Workflow.....	97
Using DocuSign Services with Conga CLM.....	99
Using DocuSign Services with Conga CPQ.....	99
Sending for eSignature .....	99
Adding Attachments.....	100
Adding Recipients.....	101
Adding Additional Details .....	105
Finalizing in DocuSign .....	107
Sending the Request.....	109
Sending Documents for Signature with Single-Click.....	111
Sending Specific Documents with Single-Click .....	112
Checking eSignature Status .....	113
To check eSignature status manually .....	114
Recalling eSignature Request .....	114
To recall an esignature request .....	115
Correct eSignature Request.....	115
To correct eSignature request.....	115
Viewing Signed Documents .....	116
To view a signed document.....	118
FAQs.....	118
DocuSign Services for REST API Developers.....	132
About REST API Guide.....	132

What's New in REST API Guide .....133

DocuSign Services REST API .....133

Basics..... 133

Endpoint ..... 133

Versions..... 134

Content Type ..... 134

Includes ..... 134

Caching..... 134

Errors..... 134

DocuSign Services Features by Release .....135

Features by Release..... 135

Community & Learning Center Resources.....136

Ready to get started? ..... 136

Send contracts or quotes for eSignature, trigger actions, track status, and automatically store contracts or quotes to the original record with DocuSign integration.

# DocuSign Services Release Notes

Review the latest DocuSign Services release notes that describe the system requirements and supported platforms, new features, enhancements, resolved issues, and known issues.


- [Spring '21 Release Notes](#)

## Spring '21 Release Notes

Release Notes contain the following information about DocuSign Services Spring '21 Release.

For more information on new features, enhancements, and document improvements refer to [What's New in DocuSign Services Documentation](#).

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Data Model Changes](#): Lists changes to the data model
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release


 This documentation may contain descriptions of software features that are optional and for which you may not have purchased a license. As a result, your specific software solution and/or implementation may differ from those described in this document. Please contact your CSM or AE for information on your specific features and licensing.

## Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides. The packages marked as **(New)** are new packages in this release.

Product	Latest Certified Version (Name   Number)
Conga Base Library <b>(New)</b>	2.0.150   2.150
Conga Contract Lifecycle Management <b>(New)</b>	12.0.0605   12.605
Conga Quote Management <b>(New)</b>	11.0.0242   11.242
Conga DocuSign API <b>(New)</b>	7.0.0110   7.110
Conga CLM DocuSign Integration <b>(New)</b>	4.1.0042   4.42
Conga Quote DocuSign Integration	4.0.0021   4.21


 If you are upgrading the Conga CLM DocuSign Integration package to the latest version, you must first upgrade the Conga Contract Lifecycle Management and Conga DocuSign API packages to the latest version. For more information, see [Upgrading DocuSign Services](#).

 Before installing or upgrading managed packages, you must review the dependency matrix for each managed package. You can refer to the package dependency matrix at [Managed Packages Dependency Matrix](#).

## System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using DocuSign Services.

System Requirement	Minimum Supported Version
Operating System	Standard <a href="#">Salesforce.com</a> requirements. See Salesforce <a href="#">PDF</a> .

System Requirement	Minimum Supported Version
Browser	<p>Conga supports the following browsers:</p> <ul style="list-style-type: none"> <li>• Microsoft Edge Chromium</li> <li>• Google Chrome</li> </ul> <p>Conga recommends the latest version of the browser for the best performance. Conga also recommends its customers to use Microsoft Edge Chromium as the browser of choice.</p> <div>  Internet Explorer is not supported. </div>

## New Features

There are no new features in this release. Keep checking the Conga Documentation Portal for new updates.

## Enhancements

The following enhancements are new to DocuSign Services in this release.

### Enhancements to Send For eSignature User Interface

In this release, the user interface of **Send For eSignature** page is enhanced in Salesforce lightning.

#### Get Started

For details on sending a document for eSignature, refer to [Sending for eSignature](#) in *DocuSign Services Spring '21 User Guide*.

### New REST API for Send for eSignature

In this release, a new REST API is introduced to send documents for eSignature.

#### Get Started

For details on REST API, refer to [DocuSign Services REST API](#) in *DocuSign Services Spring '21 REST API Guide*.

## Data Model Changes

This release does not have any data model changes for DocuSign Services.

## Resolved Issues

There are no resolved issues in this release.

## Known Issues

There are no known issues in this release.


## Spring21.03.25 Release Notes

### DocuSign Services Spring21.03.25 Release Notes

Release Notes contain the following information about DocuSign Services Spring21.03.25 Release (Conga CLM DocuSign Integration: 4.46.1).

For more information on new features, enhancements, and document improvements refer to [What's New in DocuSign Services Documentation](#).

- [Packages](#): Lists packages that are required to upgrade to this release of the product
- [System Requirements and Supported Platforms](#): Lists requirements and recommendations for installing this release
- [New Features](#): Provides high-level descriptions of new features introduced in this release, with links to more detailed information
- [Enhancements](#): Provides high-level descriptions of enhancements to existing features
- [Data Model Changes](#): Lists changes to the data model
- [Resolved Issues](#): Lists customer-reported issues that are resolved in this release or known issues resolved from previous releases
- [Known Issues](#): Lists known issues that are applicable in this release


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#### Packages

The following packages and dependent packages are required to upgrade to this release to utilize all the new features of this release. These are the *minimum* required versions; later versions are also supported. Separate prerequisites for each feature can be found in the respective guides.


Product	Latest Certified Version (Name   Number)
Conga Base Library <b>(New)</b>	2.1.0203   2.203
Conga Contract Lifecycle Management <b>(New)</b>	12.0.0605.8   12.605.8
Conga Quote Management	11.0.0242   11.242
Conga DocuSign API <b>(New)</b>	7.0.0115   7.115
Conga Contract DocuSign Integration <b>(New)</b>	4.1.0046.1   4.46.1
Conga Quote DocuSign Integration	4.0.0042   4.42

 If you are upgrading the Conga CLM DocuSign Integration package to the latest version, you must first upgrade the Conga Contract Lifecycle Management and Conga DocuSign API packages to the latest version. For more information, see [Upgrading DocuSign Services](#).

 Before installing or upgrading managed packages, you must review the dependency matrix for each managed package. You can refer to the package dependency matrix at [Managed Packages Dependency Matrix](#).

## System Requirements and Supported Platforms

The following table lists the minimum requirements for installing and using DocuSign Services.

System Requirement	Minimum Supported Version
Operating System	Standard <a href="#">Salesforce.com</a> requirements. See Salesforce <a href="#">PDF</a> .
Browser	<p>Conga supports the following browsers:</p> <ul style="list-style-type: none"> <li>• Microsoft Edge Chromium</li> <li>• Google Chrome</li> </ul> <p>Conga recommends the latest version of the browser for the best performance. Conga also recommends its customers to use Microsoft Edge Chromium as the browser of choice.</p> <div>  Internet Explorer is not supported.         </div>

## New Features

There are no new features in this release. Keep checking the [Conga Documentation Portal](#) for new updates.

## Enhancements

There are no enhancements in this release.

## Data Model Changes

This release does not have any data model changes for DocuSign Services.

## Fixed Issues

The following table lists the issue fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
00787702	DSIGN-633	When sending a document out for eSignature, the merge fields in the email subject are not populated.

Known Issues

There are no known issues in this release.

# About DocuSign Services

DocuSign Services enables customers to electronically sign any type of document associated with quotes or contracts. By integrating 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, this adapter provides a streamlined point-and-click way for users to send attachments for electronic signature. Within the 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, this adapter ensures that documents adhere to the appropriate workflows. When legal documents are approved via DocuSign, the signature status is automatically updated inside Salesforce, and final signed documents are automatically attached to the quote or contract. With this adapter, you have a fully secure, auditable and trackable view of who has approved your documents for quotes or contracts.

This adapter is part of the Quote-to-Cash suite, which provides comprehensive capabilities for Conga CPQ, Conga CLM and Revenue Management. Conga 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 Services 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

DocuSign Services allows a user to perform the following tasks:

- Use DocuSign adapter with Conga Contract Lifecycle Management
- Use DocuSign adapter with Conga Configuration & Pricing
- 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
- View signed documents

This guide describes the following tasks:

Administrator Tasks	User Tasks
<ul style="list-style-type: none"> <li>• Installing DocuSign</li> <li>• Configuring Templates</li> <li>• Configuring tags in DocuSign</li> <li>• Adding custom fields to envelope</li> <li>• Configuring signer groups</li> </ul>	<ul style="list-style-type: none"> <li>• eSignature Workflow</li> <li>• Sending documents for eSignatures</li> <li>• Checking eSignature status</li> <li>• Recalling an eSignature request</li> <li>• Viewing Signed documents</li> </ul>

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

- Basic Salesforce administration
- Salesforce and Conga terms and definitions
- Conga CLM administration

If you are new to DocuSign Services, begin here: [About DocuSign Services](#) and [Overview](#).

## Key Terminology

It is important to understand how terms are used when working with DocuSign Services.

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.

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

# What's New in DocuSign Services

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

## Spring '21

Document	Topic	Description
Spring '21	<a href="#">Adding Attachments</a>	Modified topic. Updated screenshot and steps.
	<a href="#">Adding Recipients</a>	Modified topic. Updated screenshot and steps.
	<a href="#">Adding Additional Details</a>	Modified topic. Updated steps.

## Winter '20

Document	Topic	Description
Winter 2020	<a href="#">Upgrading DocuSign Services</a>	Modified topic. Updated the topic as per the latest release.

# DocuSign Services for Administrators

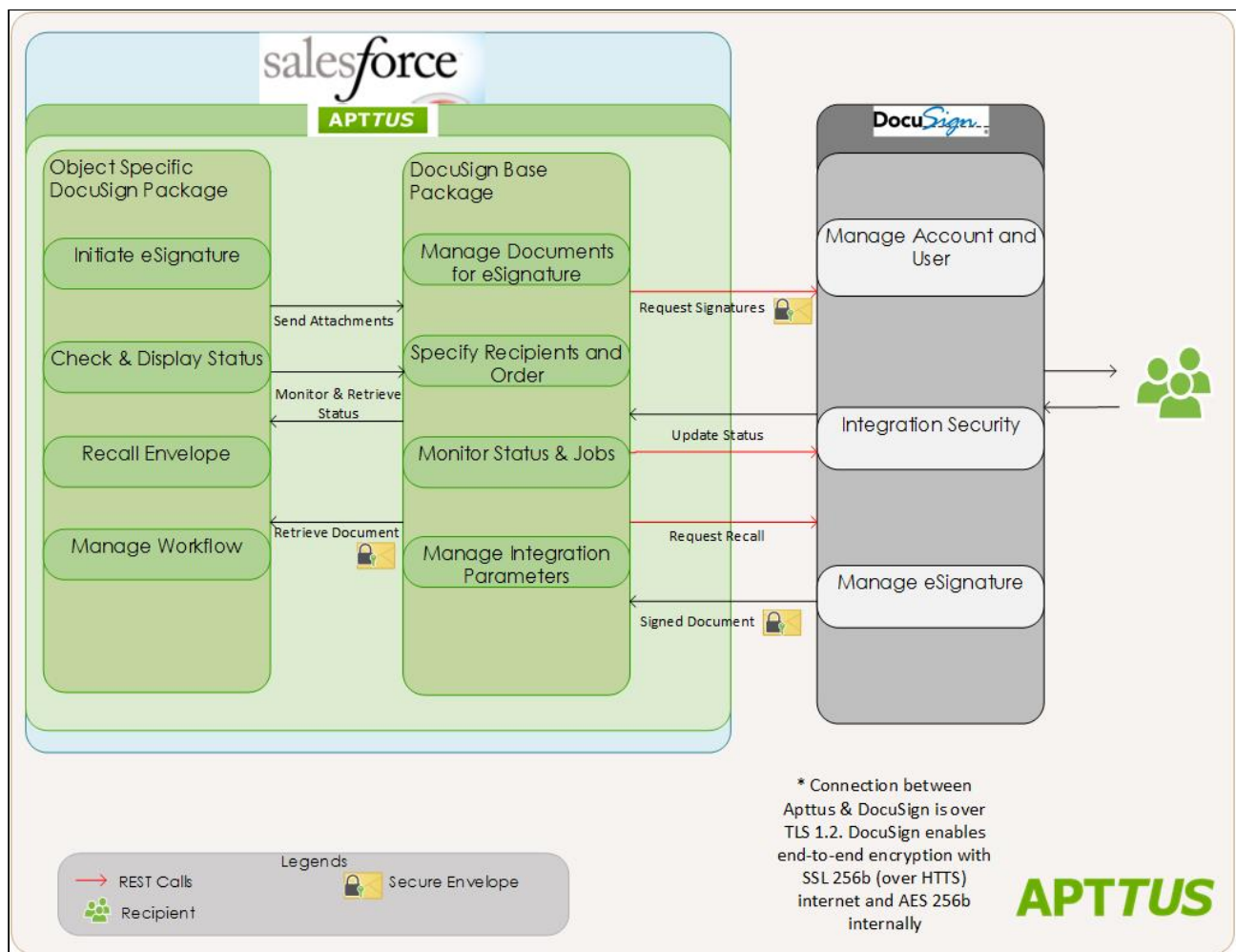
Select one of the following topics for more information:

- [Overview](#)
- [Setting Up DocuSign Services](#)
- [Configuring DocuSign Services](#)
- [DocuSign Objects](#)

## Overview

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

The standard Conga objects and workflows are used along with Conga DocuSign integration packages, which provides the connectivity between Conga and DocuSign. DocuSign Services 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 Services</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 Services</a>	This section includes information on creating templates for eSignature documents and creating tags in DocuSign.

Topic	Description
<a href="#">DocuSign for Conga Objects</a>	This section includes a list of objects used in DocuSign for Conga.

## Setting Up DocuSign Services

- [Pre-Installation Requirements](#)

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

- [Installing DocuSign Services](#)

The process for installing and setting-up DocuSign Services

- [Upgrading DocuSign Services](#)

The process for upgrading DocuSign Services


- [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 packages, you must ensure that you have set up your DocuSign account and associate DocuSign user profile for each 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 Support 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 Conga User Account

You must have a Conga 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.

 You must use the email address of the Conga 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 a Conga User account under the Admin account.

 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 Conga users in the same Org.

## Installing DocuSign Packages

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 Conga base packages and then install the integration packages that enable the various products to function together.

 You are recommended to download and upgrade packages in a Salesforce sandbox before installing them in your production environment. For information on installing and upgrading in a sandbox, please contact Support before you install any packages.

Install the packages in the following order.

 Beginning in the Spring '20 release, Conga is adding a User Experience Analysis component that collects product usage data. No action is required on your part and there is no impact to any existing product features, system functionality, or

configured workflows. No personally identifiable information (PII), nor any other proprietary, confidential, or sensitive data will be collected. If, during installation, you see an “Approve Third-Party Access” prompt, please click **Continue**.

- ✓ The Conga Push Upgrade is an automated tool that upgrades packages available in your Salesforce org (Production or Sandbox) to the latest versions. In addition, it ensures all the Conga published managed packages are on the latest versions for the registered orgs. To register your org for push upgrade, see [Registering for Conga Push Upgrade](#).

Order	Package	Install Center tab to access the package	Required?
1	Conga Base Library	Contract Management	Y
2	Conga Contract Lifecycle Management	Contract Management	Y
3	Conga Quote Management	CPQ	Y
4	Conga DocuSign API	DocuSign Integration	Y
5	Conga CLM DocuSign Integration	DocuSign Integration	Y
6	Conga Quote DocuSign Integration	DocuSign Integration	Y

**i** You must have login credentials to the Community Portal to be able to download packages.

## To install the Conga DocuSign packages

1. Go to the **Resources > Install Center** tab on the Community Portal.
2. In **My Packages** navigation link, click **DocuSign Integration**. From the VERSION drop-down, 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.
7. Select the profile for which you want to install the package. You are recommended to 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 packages, assign the user profile permissions and associate the appropriate Conga users to those created in DocuSign.

## Registering for Conga Push Upgrade

You can register your org for Conga Upgrade Program to auto-upgrade Conga managed packages. Conga Upgrade Program supports upgrading from the Spring '18 release or later to the latest major release ( $n$ ) or previous two major releases ( $n - 1$  or  $n - 2$ ).


### To register your org with Conga Upgrade Program for auto-upgrade

This section provides a high-level flow of the org registration process and early feedback programs. Refer to *Conga Upgrade Program documentation* for a comprehensive overview of features.

1. Launch the [Conga Upgrade Program's registration page](#).
2. Select your Salesforce org type (**Production** or **Sandbox**). The Salesforce login page is displayed.
3. Enter your credentials and click **Login**. You are redirected to the connected app called **Conga Push Upgrade CA**, which prompts you to allow access to the org information.

4. Click **Allow**. The org registration form is displayed.
5. Click **Set Package Access Control** to set the accessibility for Conga packages to be upgraded with Conga Upgrade Program.
6. Click **Submit**.

The **Early Feedback** pop-up is displayed. In addition, Conga sends an email notification to the system administrator on successful registration with a list of packages (including dependent packages, if any) handled in the upgrade process.


 The early feedback program executes a test suite to check if the customizations in your org are compatible with the upgrade. For more information, see the [Conga Automation Early Feedback program](#).


7. Click **Try Now**. A **Conga Automation Dashboard** is displayed with a **Quick Guide** pop-up. Click **Yes** to go through the quick tour of the dashboard.
8. Click **Click to see the test** to view a list of tests to be executed for your org, A **List of Tests** pop-up is displayed.
9. Enter your Email ID and Organization Name. You can enter multiple email ids.
10. Click **Trigger Welcome Email**. Conga sends a welcome email to the email ids entered in the previous step with a list of tests performed in the early feedback program.
11. Click **Proceed**. A **Conga Services Test Automation Execution Page** is displayed.
12. Click the checkbox next to the Job ID and click **Begin Test Execution** to run the predefined automated test suite against your org.

For the latest information on Conga Upgrade Program, see [Conga Upgrade Program documentation](#).

## Upgrading DocuSign Services

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

 If you have not installed DocuSign Services, you can contact Support to request an installation link, then perform the standard installation as described in [Setting Up DocuSign Services](#).

 The Conga Push Upgrade is an automated tool that upgrades packages available in your Salesforce org (Production or Sandbox) to the latest versions. In addition, it ensures all the Conga published managed packages are on the latest versions for the registered orgs. To register your org for push upgrade, see [Registering for Conga Push Upgrade](#).

## Preparing for Upgrade


Before you upgrade to DocuSign Services Spring '21, you must ensure the following:

- You go through [DocuSign Services Feature by Release](#) to know about the new features, enhancements, and deprecated features in DocuSign Services since your existing release. After you upgrade DocuSign Services to Spring '21, you cannot roll back to any previous release.
- You have [supported platforms and system requirements](#).
- You have access to the **Install Center** on the [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 Services Spring '21

This section describes step-by-step instructions to upgrade from Winter '20 and Summer '20 to Spring '21.

 If you are upgrading the Conga CLM DocuSign Integration package to the latest version, you must first upgrade the Conga Contract Lifecycle Management and Conga DocuSign API packages to the latest version.

## Upgrading DocuSign Services from Winter '20 to Spring '21

1. Go to **Setup > Installed Packages** and ensure that your current Salesforce org has the following Winter '20 packages installed.

Product	Package Version (Name   Number)
Conga Base Library	1.2.123   1.123
Conga Contract Lifecycle Management	11.2.0582   11.582
Conga Quote Management	10.2.0227   10.227
Conga DocuSign API	6.0.0101   6.101

Product	Package Version (Name   Number)
Conga CLM DocuSign Integration	4.1.0041   4.41
Conga Quote DocuSign Integration	4.0.0021   4.21

2. Ensure that you have the following packages and dependent packages to upgrade to Spring '21. These packages are required to utilize the new features and enhancements of Spring '21.

Product	Package Version (Name   Number)
Conga Base Library	2.0.150   2.150
Conga Contract Lifecycle Management	12.0.0605   12.605
Conga Quote Management	11.0.0242   11.242
Conga DocuSign API	7.0.0110   7.110
Conga CLM DocuSign Integration	4.1.0042   4.42
Conga Quote DocuSign Integration	4.0.0021   4.21

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

## Upgrading DocuSign Services from Summer '20 to Spring '21

1. Go to **Setup > Installed Packages** and ensure that your current Salesforce org has the following Summer '20 packages installed.

Product	Package Version (Name   Number)
Apttus Base Library	1.1.93   1.93
Apttus Contract Management	11.1.0547   11.547
Apttus Proposal Management	10.1.0221   10.221
Apttus DocuSign API	6.0.0093   6.93

Product	Package Version (Name   Number)
Apttus Contract DocuSign Integration	4.1.0040   4.40
Apttus Quote DocuSign Integration	4.0.0021   4.21

2. Ensure that you have the following packages and dependent packages to upgrade to Spring '21. These packages are required to utilize the new features and enhancements of Spring '21.

Product	Package Version (Name   Number)
Conga Base Library	2.0.150   2.150
Conga Contract Lifecycle Management	12.0.0605   12.605
Conga Quote Management	11.0.0242   11.242
Conga DocuSign API	7.0.0110   7.110
Conga CLM DocuSign Integration	4.1.0042   4.42
Conga Quote DocuSign Integration	4.0.0021   4.21

3. Perform the upgrade. The upgrade procedure is the same as the installation procedure. For detailed information on installing DocuSign managed packages, see [Installing DocuSign 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 Services.

- [Associating a 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 Conga.

- [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 Service.

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

Custom Field Level Security	System Administrator	Sales User	Comply User	Legal
DocuSign Callout Transient	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Default Recipient (Deprecated)	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Envelope	All fields enabled	All fields enabled	All fields enabled	All fields enabled
DocuSign Envelope 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


Custom Tab Settings	System Administrator	Sales User	Comply User	Legal
DocuSign Demo	Default Off	Tab Hidden	Tab Hidden	Tab Hidden
DocuSign Envelope Recipient Status	Default On	Tab Hidden	Tab Hidden	Tab Hidden
DocuSign Envelopes	Default Off	Tab Hidden	Tab Hidden	Tab Hidden
DocuSign Status	Default Off	Tab Hidden	Tab Hidden	Tab Hidden
DocuSign Users	Default Off	Tab Hidden	Tab Hidden	Tab Hidden
Custom Record Type Settings		System Administrator		
DocuSign Account Configurations		NA		
DocuSign Callout Transients		NA		
DocuSign Envelopes		NA		
DocuSign Recipients		Signing Group, Contact (Default), Email, User		
Custom Object Permissions	System Administrator	Sales User	Comply User	Legal
DocuSign Account Configuration	NA	NA	NA	NA
DocuSign Callout Transient	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Default Recipient (Deprecated)	NA	NA	NA	NA

Custom Object Permissions	System Administrator	Sales User	Comply User	Legal
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	NA	NA	NA	NA
DocuSign Recipient Status	Read, Create, Edit, Delete, View All, Modify All	Read, Create, Edit, Delete	Read, Create, Edit, Delete	Read
DocuSign Signing Groups	NA	NA	NA	NA
DocuSign Signing Group Members	NA	NA	NA	NA
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

Once you have created an account and users in DocuSign, you must associate those users to the users in Conga.

 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 Services. To create an account on DocuSign, go to [DocuSign](#).

## Associating a user to a DocuSign account

Once you have created an account and users in DocuSign, you must associate those users to the users in Conga. Doing this enables the user to access the Conga-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 Conga user account and DocuSign user account.


### To associate a user to DocuSign account

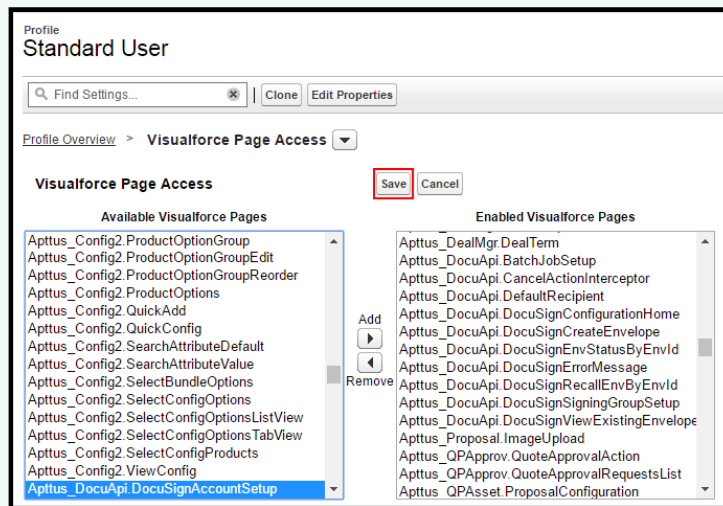
You must have an existing DocuSign account.

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 Conga 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.

Field	Description
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, 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 Conga 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 Services implementation and once you are ready to go live you can switch over to a production server. These two system properties handle that requirement.

App Setup > Develop > Custom Settings > DocuSign System Properties	
Name	Description
Production Server Pod	Indicates which server the DocuSign Services 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>
Production Environment?	Checking this indicates that the DocuSign production server is to be used. If it is not checked a development/sandbox server will be used. If it is unchecked it will connect to a DEMO server, regardless of what value is in Production Server Pod.

If the settings mentioned below do not already exist, you must create three 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 Active.

Administration Setup > SecurityControls > 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.

App Setup > 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.</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 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> <div data-bbox="938 1126 1426 1413"> <p> This option is overridden by Select First Document Default setting in System Properties. The system will consider Select First Document Default setting first.</p> </div>
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## DocuSign System Properties

The following managed properties are used throughout this document.


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

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
Name	Description
DocuSign Envelope Status Subscriber	Class names to be called by Envelope Status Sync job update extension objects.
Production Server Pod	Indicates which server the DocuSign 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>
Email Body (Deprecated)	This field allows you to set the default Email Message to be sent for eSignature requests. The only static text is allowed in this field. You cannot add HTML text or merge fields.
Email Subject (Deprecated)	This field allows you to set the default Email Subject to be sent for eSignature requests. The only static text is allowed in this field. You cannot add HTML text or merge fields.
Frequency to run check eSignature status (Deprecated)	A System setting to refresh data from DocuSign for 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.
In-Person Signers	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.

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
Name	Description
MaxNumberOfSignerRole (Deprecated)	This setting sets the maximum number of <i>Signer role</i> fields that will be available in the document to be sent for eSignature.
Production Environment?	Selecting this check box indicates that the DocuSign production server is to be used. If it is unchecked it will connect to a demo server, regardless of what value is in <i>Production Server Pod</i> .
Recipient Status Sync Interval (Deprecated)	A System setting to refresh data from DocuSign for scheduled job in minutes on each hour. If more than one value is to be entered, must be comma separated values.
RetrieveAsCombinedDocument	<p>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.</p> <div>  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 Conga CLM User Guide. </div>
Select First Document Default	<p>Checking this selects the most recently modified document in the agreement record's Notes &amp; 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.</p> <p>This custom setting is overridden by Select All Attachments custom setting. For more information, refer to FAQs.</p>
Sort Document Descending	Checking this sorts documents starting with which one has been updated most recently. If this is not checked, the documents are sorted based on how they are listed in Notes & Attachments.

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
Name	Description
Recipient Tabs Enabled	Tabs are specific to each recipient and designated for each recipient. Selecting this checkbox enables the Recipient Tabs for recipient addition or subtraction.
Add Attachments Enabled	Selecting this check box enables you to add additional attachments to be sent to recipients when you navigate to a Contract or a Proposal and click Send for Signature.
Add Recipients Enabled	<p>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.</p> <p>For more information on disabling recipient configuration, refer to <a href="#">FAQs</a>.</p>
Auto Provision User Enabled	If the user you have logged-in with is not a DocuSign licensed user, the user cannot send a document for eSignature to intended recipients. Selecting this checkbox enables you to auto-provision the user as a DocuSign user account based on the licensing agreement and licenses rendered to your org by DocuSign.
Send for Signature Enabled	Selecting this check box enables the Send for eSignature button when you navigate to a Contract or a Proposal and click Send for Signature. Clicking this button sends the attached document to the specified recipients.
View In DocuSign Enabled	Selecting this check box enables the Finalize in DocuSign button when you navigate to a Contract or 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 fields (DocuSign tabs) enabled.

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
Name	Description
Http Timeout	<p>Adjusts the Http call timeout limit. The default value for this field is 30,000 (milliseconds) and the maximum value is 120,000.</p> <p>For more information on the behavior of this setting, refer to <a href="#">FAQs</a>.</p>
Include Certificate	<p>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.</p> <p>For more information on the behavior of this setting, refer to <a href="#">FAQs</a>.</p>
Edit Email Enabled	<p>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.</p>
Recipient Roles Enabled	<p>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.</p>
Remove Recipient Ordering	<p>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.</p> <p><b>Note:</b> When Recipient Roles Enabled check box is selected, Remove Recipient Ordering is ignored.</p>
Sync Apttus Created Envelopes Only	<p>Selecting this checkbox will sync only Apttus created Envelopes when you run a batch job.</p>


App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
Name	Description
One-Click Send	Selecting this check box enables you to send documents with a single click. Your agreement or quote/proposal must have at least one attachment in the Notes and Attachments section, and one recipient in DocuSign Recipients related list. When the user clicks Send for Signature, the document in the Notes & Attachment section is sent to the default recipient.
Profiles Enabled for Finalize	<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>  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>

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
Name	Description
Profiles Enabled for Finalize 2	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> .
Profiles Enabled for Finalize 3	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> .
Use Default Reminders & Expiration	<p>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.</p> <p>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.</p> <p>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.</p>

App Setup > Develop > Custom Settings > DocuSign System Properties > System Properties	
Name	Description
DocuSign Templates Enabled	<p>Selecting this check box enables you to load the DocuSign Templates into Conga. You can then use the templates that you have created in DocuSign.</p> <p>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.</p> <p>When unchecked, Agreement Template drop-down menu is not visible on the Additional Details page.</p>
Profiles Enabled for Template Selection	<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>
DocuSign Batch Processing Disabled	<p>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.</p>

App Setup > Develop > Custom Settings > DocuSign System Properties > DocuSign Custom Classes

Name	Description
Add Recipient Tabs Callback Class	Enter the name of the Callback class to be used for adding a recipient.  For example, DocuSignEnvelopeSetRecipientTabs2Imp
Return Recipient Tabs Callback Class	Enter the name of the Callback class to be used for returning a recipient.  For example, DocuSignEnvelopeGetRecipientTabs2Imp

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

App Setup > Develop > Custom Settings > DocuSign System Properties > ProposalWorkflow

Name	Description
Name	Enter <i>ProposalWorkflow</i> . For the quote integration to work as expected, this needs to be the value.
DocuSign Envelope Status Subscriber	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> .

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

## 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.

Name	Description
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<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>One Click Send</b>	<p>Selecting this check box enables One Click Send feature to directly send the document for eSignature using 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
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<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> <div data-bbox="679 958 1426 1167">  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. </div>
<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>	<p>Selecting this check box fetches the documents from the Notes &amp; Attachments related list of all the related or sibling agreements.</p>
<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>	<p>For future release.</p>

<b>One Click Send</b>	<p>Selecting this check box enables One Click Send feature to directly send the document for eSignature using 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>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>

## 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.

 You are recommended to use the 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. DocuSign Services 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](#).

ℹ You will see EmailSubjectText and EmailBodyText as custom labels for the core object (Conga DocuSign API), Conga CLM, and Conga CPQ Proposals. You do not need to configure the email subject text and email body text for Conga 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.

## 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

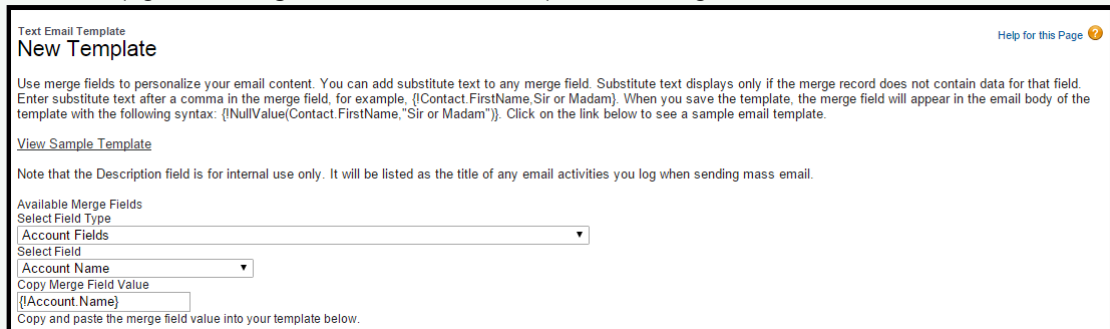
1. Go to **Setup > Build > Create > Custom Labels** and click Edit for EmailBodyText. (Installed Package: Conga CLM DocuSign Integration or Conga Quote DocuSign Integration)

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

2. Click **Edit**.
3. Under the Translations related list, click **New Local Transactions / Overrides**.
4. From the **Language** picklist, select the language you want to translate your email body text.

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

- ✓ **To determine a merge field value**
  - a. Go to **Setup > Administer > Communication Templates > Email Templates**.
  - b. Click **New Template**.
  - c. Select 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.



Text Email Template Help for this Page

### New Template

Use merge fields to personalize your email content. You can add substitute text to any merge field. Substitute text displays only if the merge record does not contain data for that field. Enter substitute text after a comma in the merge field, for example, `{!Contact.FirstName,Sir or Madam}`. When you save the template, the merge field will appear in the email body of the template with the following syntax: `{!NullValue(Contact.FirstName,"Sir or Madam")}`. Click on the link below to see a sample email template.

[View Sample Template](#)

Note that the Description field is for internal use only. It will be listed as the title of any email activities you log when sending mass email.

Available Merge Fields

Select Field Type  
Account Fields

Select Field  
Account Name

Copy Merge Field Value  
{!Account Name}

Copy and paste the merge field value into your template below.

6. Click **Save**.

## To configure custom email subject

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


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

2. Click **Edit**.
3. Under the Translations related list, click **New Local Translations / Overrides**.
4. From the **Language** picklist, select the language that you want to translate your email subject to.
5. Enter the message that you want to enter for your recipients in **Translation Text**. You can also enter Salesforce Merge Field values in your translation text.
6. Click **Save**.

## Configuring Multiple Email Templates

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

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

 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. 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	Include Certificate checked?	Retrieve as a Combined Document checked?	Attach Certificate of Completion to the Envelope PDF checked? (In DocuSign Account)	Behavior
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 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 CheckSignature 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

# Configuring DocuSign Services

- [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 for Contracts; 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 Expiration enables 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 eSignature 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.

 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 you are required to create your own tag nomenclature or follow the examples used here.

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

## To configure DocuSign tags

1. From the Home tab, click Edit for the DocuSign ID Card, and then click **Member Options > Custom Tags**.
2. Click **Add** and from the **Type** list, select a type that you will be using in your 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 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 Conga 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 templates as well if you want them to be included in eSignature documents.

## Configuring Templates

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

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

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

Tag Type	Signer 1	Signer 2	Signer 3	Signer 4
Signature	\si1\	\si2\	\si3\	\si4\
Initial	\in1\	\in2\	\in3\	\in4\
Optional Initial	\oin1\	\oin2\	\oin3\	\oin4\
Name	\na1\	\na2\	\na3\	\na4\
Company	\cy1\	\cy2\	\cy3\	\cy4\
Title	\ti1\	\ti2\	\ti3\	\ti4\
Date Signed	\ds1\	\ds2\	\ds3\	\ds4\
Checkbox	\cb1\	\cb2\	\cb3\	\cb4\
Company	\co1\	\co2\	\co3\	\co4\
Date	\dt1\	\dt2\	\dt3\	\dt4\
Date Signed	\ds1\	\ds2\	\ds3\	\ds4\
Email Address	\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-Authentic Contracts and go the **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_end \\* 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.

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

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

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

## Loading DocuSign Templates into Conga

DocuSign Services now enables you to load the DocuSign Templates into Conga. 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 Conga as well. To enable Loading DocuSign Templates into Conga, 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 Conga

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.


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

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

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

## 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**.

 Step 2 schedules 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 Conga. You must enter the 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 [Adding Custom Fields to the Envelope](#)

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

String strKey = parentId + objRecipeintStatus.routingOrder;

Apttus_DocuApi.DocuSignUtil2.RecipientTabs rTabs = objRecipeintStatus.tabs;

//check if the recipient tab has text tabs

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

if(recipientMap.containsKey(strKey)){

```

```

System.debug('Getting Map values for Id == > '+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.

 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 demonstrating 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.listToSetRec
ipientTabsWrapper.get(counter);
this.listToSetRecipientTabsWrapper[counter] = this.addRecipeintTabs(objSetRecipientTa
bsWrapper);
}
System.debug(System.LoggingLevel.ERROR, 'SETTER : Sep 002 ');
return listToSetRecipientTabsWrapper;
}

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

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

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

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

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

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

return objRecipient;
}

```

```

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

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

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

Apttus_DocuApi.DocuSignUtil.emailTab objEmailTab = new
Apttus_DocuApi.DocuSignUtil.emailTab(iRecipientId,'email'+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.



You must 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 enable these values.
6. Click **Save**.

## Configuring Signer Groups

**Signer Groups** enables the admins to create a group of multiple users which can be used as recipients. The document can then be sent to the entire group for signing. 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. Anyone 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 this 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 connector. You can search for a user and remove him from the existing signing group. You can not create or delete Signer Groups using this 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

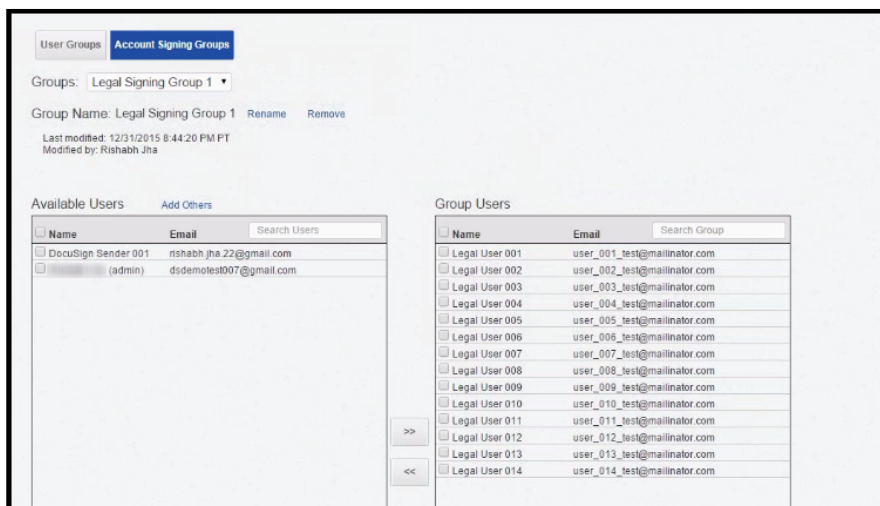
1. Log in to your DocuSign account.
2. Click the user menu and select **Preferences**.
3. Under Account Administration, click **Groups**.
4. Click the **Account Signing Groups** tab.
5. From the Groups picklist, select **New Group** to create a new signing group.

-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.




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.


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

 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**. You must sync the DocuSign account with Conga 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.

 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**. You must sync the DocuSign account with Conga 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 Conga 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> <div>  The user <b>Can Not</b> view the fields pertaining to Reminders and Expiration on the Additional Details screen. </div>
<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> <div>  The user <b>Can Not</b> view the fields pertaining to Reminders and Expiration on the Additional Details screen. </div>

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> <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> <div>  The user <b>Can Not</b> change settings in the Additional Details section. </div>
<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> <div>  The user <b>Can</b> change settings in the Additional Details section. </div>

DocuSign Account Fields	Additional Details Section Fields	Result
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> <div>  The user <b>Can</b> change settings in the additional Details section. </div>
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> <div>  The user Can Not view the fields pertaining to Reminders and Expiration on the Additional Details screen. </div>

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> </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> <div>  The user can change settings in the Additional Details section. When the user leaves the values blank, the default values mentioned in the DocuSign account are used. </div>

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

## To configure reminders and expiration in DocuSign account

1. Click the User Menu and select **Preferences**.
2. On the left-side panel, under Account Administration, click **Reminders & Expirations**.  
You can set account-level reminders and expiration of your documents from this page.
3. Under Set Default Reminders and Expirations section, select Send Reminder in [] Days check box and provide information as mentioned below.

Field	Description
<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**.

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

 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 Conga CLM DocuSign Integration.  
-or-  
Click **Edit** for Proposal System Properties if you are using Conga Quote DocuSign 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 [Configuring One-Click Send for Specific Envelopes](#)

## DocuSign Objects

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

DocuSign 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 Objects	Purpose of the Object
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.

# DocuSign Services for Users

Select one of the following topics for more information:

- [Getting Started](#)
- [Pre-requisites](#)
- [eSignature Request Workflow](#)
- [Using DocuSign Services with Conga CLM](#)
- [Using DocuSign Services with Conga CPQ](#)
- [Sending for eSignature](#)
- [Sending Documents for Signature with Single-Click](#)
- [Checking eSignature Status](#)
- [Recalling eSignature Request](#)
- [Correct eSignature Request](#)
- [Viewing Signed Documents](#)
- [FAQs](#)

## Getting Started

The DocuSign Services enables customers to electronically sign any type of document associated with quotes or contracts. By integrating Conga 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 Proposals and Agreements.

## Logging into DocuSign Services

A Conga 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 a Conga 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 the DocuSign connector.

 **Note**

Do not use Back button on the browser when using the DocuSign connector.

## To log into DocuSign connector

1. Go to <http://www.salesforce.com>.

Or

If your organization is using a sandbox or test environment to access CPQ (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 connector.

## Proposals and Agreements

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

## Pre-requisites

You must have the following in order to use DocuSign Services.

- 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 your system admin. If you do not have an account and wish to use the connector to provision one, please request your 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 the Create an Account section.

## To create a DocuSign account

1. In Salesforce, click the **DocuSign Configuration Home** tab.
2. If you do not possess 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.



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

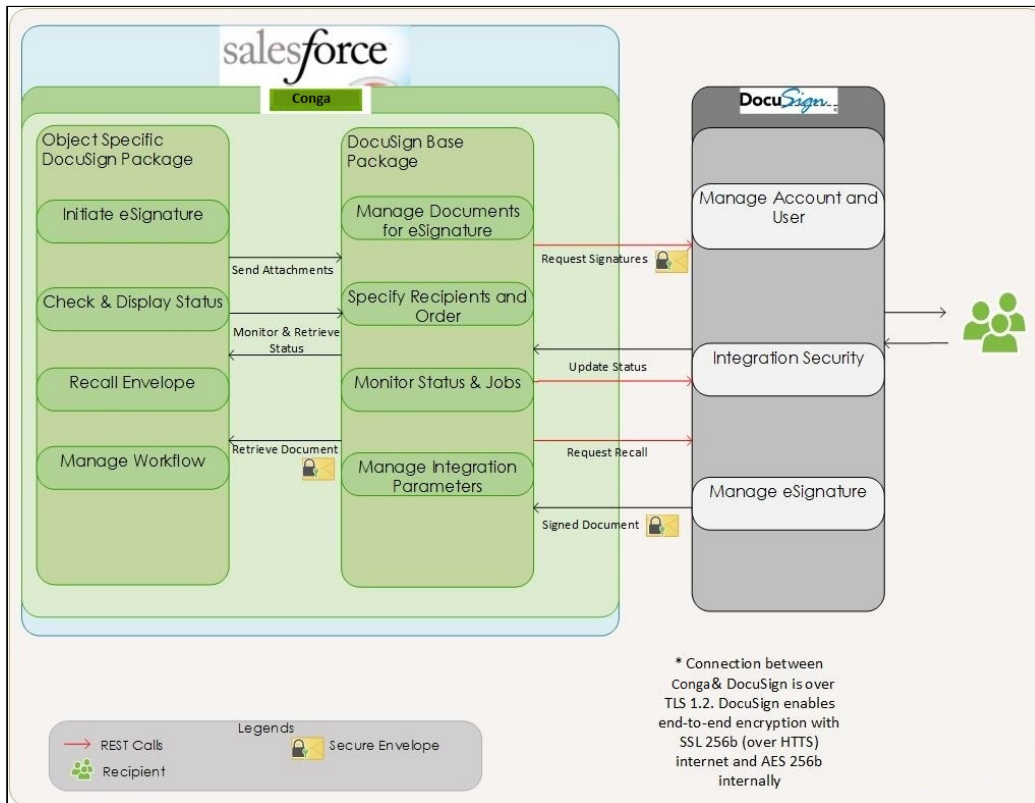
You must attach at least one file in the Notes & Attachments related list for the record if you want to use only the Send for eSignature feature. If you would prefer to attach the attachment in DocuSign, then you use the Finalize in DocuSign feature. You can attach either a PDF, DOC, DOCX, or RTF file 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 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.

## eSignature Request Workflow

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



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.

## Using DocuSign Services with Conga CLM

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.

## Using DocuSign Services with Conga CPQ

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.

## 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 the agreement. You can manually attach a document using the Salesforce attachment process, or you can use 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 the Salesforce attachment process.
- **Attach a document using 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**.
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. Click **Send for DocuSign**. You are redirected to **Add Attachment(s)** page. All the files associated with the **Notes & Attachments** related list are displayed here.

2. Select the checkbox for the file name that you want to send for eSignature.

The screenshot shows the 'Send For eSignature' window with a table of attachments. The table has columns for File Name, Last Modified, Size (KB), and Relationship. Three files are listed: 'Corporate\_agreement\_2021-01-21\_.pdf', 'Legal Document.pdf', and 'Supporting Document.pdf'. Each row has a checkbox in the 'File Name' column and a dropdown arrow icon in the 'Relationship' column.

File Name	Last Modified	Size (KB)	Relationship
<input checked="" type="checkbox"/> Corporate_agreement_2021-01-21_.pdf	1/21/2021 4:12 PM	191	Primary
<input checked="" type="checkbox"/> Legal Document.pdf	1/21/2021 4:13 PM	288	Primary
<input checked="" type="checkbox"/> Supporting Document.pdf	1/21/2021 4:12 PM	308	Primary

3. Set the order of attachments by clicking this  icon to determine the order of documents to be signed.
4. Click **Add Recipient(s)** to add recipients other than default recipients.
- or-
- Click **Finalize In DocuSign** to complete the document in DocuSign.
- or-
- Click **Send For eSignature** to directly send the document for signature.
- or-
- Click **Additional Details** to configure the email, reminders, and expiration settings.
- or-
- Click **Cancel** to cancel the eSignature request.

 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 an 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 Recipient(s) screen contains a table that has a list of the recipients. The table has the name of the recipient, the email for the recipient, the routing order, and the signer type. The following tasks are explained in this section:


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




## 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 the **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.

 You must use the custom button **New eSigner - Agreement** when working in Classic mode and use the 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**.
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 the **Recipient Type** picklist. The available options are.

Option	Description
Signer	The signer is a regular eSignature signer.
Carbon Copy	Carbon Copy singer is sent the copy of the current document.
In-Person Signer	An 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 the 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 a 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.

**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 an 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?** checkbox 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 cannot

remove this recipient from the Recipients list. If you cannot view the **Required?** field, then Edit your Layout to include Required? field. If you cannot edit the layout, contact your system administrator.

**Note**

On the **Add Recipient(s)** 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.
13. Click **Save**.


## To add salesforce contact as a recipient

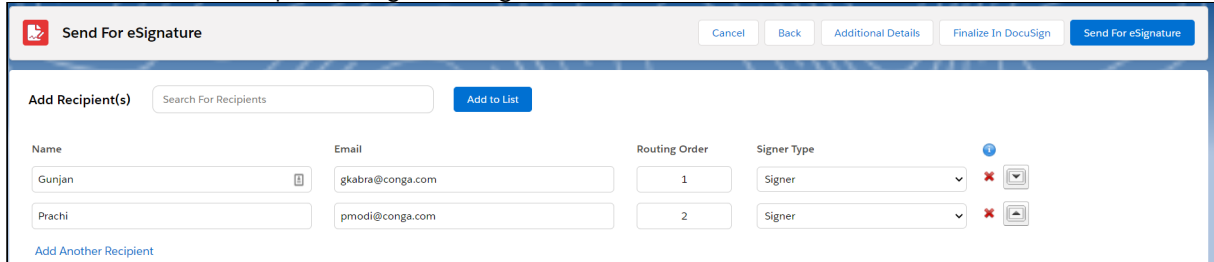
1. Click **Add Recipient(s)**.
2. Enter the appropriate keyword to search and select the appropriate user. This search looks up the Salesforce contacts only.
3. Click **Add to List**.

## To add a new recipient

1. Click **Add Another Recipient**.
2. Enter **Name** of the recipient.
3. Enter the **Email** address of the recipient.
4. Enter the **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. Set the order of recipients by clicking this  icon.



7. Click **Finalize In DocuSign** to complete the document in DocuSign.
- or-
- Click **Send For eSignature** to directly send the document for eSignature.
- or-
- Click **Additional Details** to configure the email, reminders, and expiration settings.
- or-
- Click **Back** to go back to **Add Attachment(s)** screen.
- or-
- Click **Cancel** to cancel the eSignature request.

## Adding Additional Details

The Additional Details page contains fields like Custom Email Subject, Custom Email Body, Email Notifications / Reminders, and Expiration Periods. You can specify the default subject and body for an email that is sent to the DocuSign recipient when a document is sent for eSignature. Salesforce merge fields are supported in the email subject and body. The 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 **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 to the Additional Details screen if required.

3. Under the **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 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.
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 document today and you enter the value as 365. The envelope will be valid for a year. <b>Note:</b> 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 the 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 the value as 10. Hence, a warning of expiration will be sent 10 days before the expiration of the document.

 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 checkbox 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 Apply 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. Click **Preview** to preview the email message with resolved Merge fields.
  - or-
  - Click **Finalize In DocuSign** to complete the document in DocuSign.
  - or-
  - Click **Send For eSignature** to directly send the document for eSignature.
  - or-
  - Click **Back** to go back to **Add Attachment(s)** screen.
  - or-
  - Click **Cancel** to cancel the eSignature request.

## 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 body for a recipient in DocuSign Recipient, then the email subject and 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.

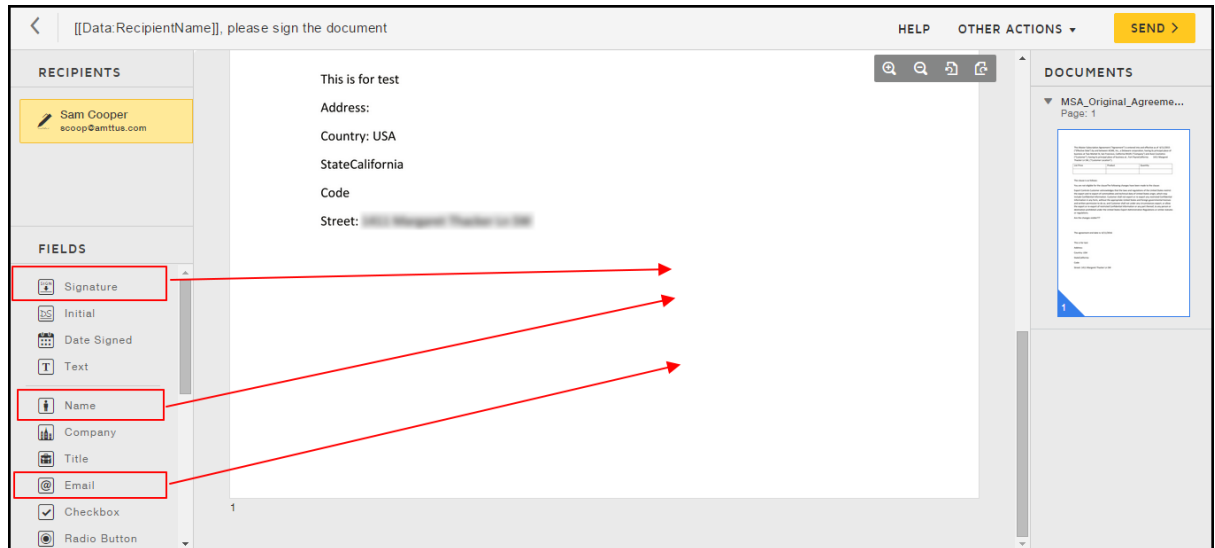
 **Use Case**

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 the 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 are displayed in Finalize in DocuSign.

## To use DocuSign console

1. Click **Finalize In DocuSign**.  
This opens the documents inside the DocuSign Console.
2. You can drag and drop the required tags on your document.



3. If you have more than one recipient, and you want to associate a tag with a recipient; click on the recipient's name and drag the appropriate tag to the appropriate place.
4. If you want to 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 **Actions**.
6. Click **Advanced Options**.
7. If you want to set a reminder, select **Send automatic reminders** checkbox and enter days for which you want to remind your recipient.
8. If you want to set an expiration date for the agreement, enter the 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 DocuSign**, the 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 Body will be pulled and directly sent for eSignature.


## 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 **Send for DocuSign**.

 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 eSignature**.
5. The status of the envelope 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 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 the 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.
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**.

Subject: Documents for your DocuSign Signature from Apttus CLM

DocuSign

100% Download Print More

While it can be translated into multiple languages, you can also use the translate feature to override the text in your default system language as well. You must have the Translation Workbench enabled in your org and users must have the required access to use it.

**Confirm Signing**

All required fields complete.

You will have an opportunity to save your copy on the next screen.  
Click "Confirm Signing" when you are ready.

Product ID: 000

Customer 1 Initial: BB

Signature: Bob Bobbington

Name: Bob Bobbington

Date: 2/12/2014

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.

## 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 and 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 in 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 the 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, the 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.

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 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.

- 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.

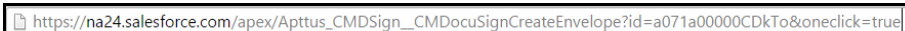
```
For Agreements,
https://<your_instance_url>/apex/Apttus_CMDSign__CMDocuSignCreateEnvelope?
id=<agreement_id>&oneclick=true

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
```

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



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

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

## 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 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.

The screenshot shows the 'Agreement Detail' page for an agreement with ID 00001708.0. The 'Contract Management' progress bar indicates the current status is 'In Signatures'. The 'Actions' section at the bottom contains several buttons, with 'Check eSignature Status' highlighted by a red box. Other visible buttons include 'Regenerate', 'Activate', 'View E-Signature Document', and 'Recall E-Signature Request'.

Agreement Detail		Primary Contact	
Agreement Number	00001708.0	Owner	Diego Francis
Agreement Name	NDA	Record Type	NDA [Change]
Account	Strickland Propane	Status Category	In Signatures
Parent Agreement		Status	Other Party Signatures
Agreement Start Date	9/14/2015	What is being disclosed?	
Agreement End Date	9/12/2016	Perpetual	<input type="checkbox"/>
Region		RevRec Active	<input type="checkbox"/>
Total Agreement Value		RevRec Forecast Active	<input type="checkbox"/>
		Send to Customer	eSignature

**Actions**

Generate Agreement	Send For eSignature
Regenerate <input type="button" value="Regenerate"/>	Correct E-Signature Document <input type="button" value="View E-Signature Document"/>
Activate <input type="button" value="Activate"/>	Check eSignature Status <input type="button" value="Check eSignature Status"/>
	Recall E-Signature Request <input type="button" value="Recall E-Signature Request"/>

Last Modified By: Zachary Singh, 9/14/2015 5:39 AM

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.

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.

## 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.

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

## 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 that 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.

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 that 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 with the primary agreement will not be affected.
Yes	Yes	Yes	No	A user sends an agreement that 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 with 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.
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.

## 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.

Accounts Opportunities Proposals Agreements Coins DocuSign Configuration Home DocuSign Users +												
<b>Apex Jobs</b>												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		7071a00000PzmiF
	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		7071a00000PVZK
	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		7071a00000ON1x
	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?**

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

DocuSign 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 the 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 of Get 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**.

#### **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).

Solution: 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 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 DocuSignBatchGetEnvelopeStatus 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: XXXXXXXX	DocuSignBatchGetEnvelopeStatus

**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.
  - 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.

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?**

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 is 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.
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.

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=a1p300000008YglAAU](https://success.salesforce.com/issues_view?id=a1p300000008YglAAU).

### **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?**

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.

Select First Document Default checked? (System Properties)	Select All Attachments checked? (Comply System Properties / Proposal System Properties)	Result
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 Services 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 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 Agreements object here. You can perform the same steps for 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 Package).
  - 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.

### 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](#).

# DocuSign Services for REST API Developers

Select one of the following topics for more information:

- [About REST API Guide](#)
- [What's New in REST API Guide](#)
- [DocuSign Services REST API](#)

## About REST API Guide

DocuSign Services REST API Guide explains the REST APIs provided by Conga DocuSign integration.

Topic	Description
What's Covered	This guide walks the API developers through the complete list of REST APIs provided by Conga DocuSign integration.
Primary Audience	REST API Developer
IT Environment	Refer to the latest DocuSign Services <a href="#">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 the <a href="#">What's New</a> topic.
Other Resources	<ul style="list-style-type: none"><li>• <i>DocuSign Services User Guide</i>: Refer to this guide for information on using DocuSign Services.</li><li>• <i>DocuSign Services Administrator Guide</i>: Refer to this guide for information on setting-up DocuSign.</li></ul>

This guide describes the following API:

- `sendForESignature`

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

- Basic Salesforce administration
- Salesforce and Conga terms and definitions

If you are new to DocuSign Services, begin here: [About DocuSign Services](#) and [Overview](#).

DOC ID: DSIGNSPR21RESTAPI20210302

## What's New in REST API Guide

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

Document	Topic	Description
Spring '21	All topics	Complete new REST API guide.

## DocuSign Services REST API

### Basics

The DocuSign Services API follows a microservice architecture that enables DocuSign into any part of an application and is built on the [JSON API](#) specification, follows predictable [REST](#) URLs, and supports [cross-origin resource sharing](#).

### Endpoint

The DocuSign Services API is installed with the DocuSign managed package and can be exposed to external applications via a Salesforce site or community.

```
https://{testmanaged-clmauto3.my.salesforce.com}/services/apexrest/  
Apttus_DocuApi/docusignIntegration/v1  
  
/envelopes/:agreementId/sendForESignature
```

You must replace this path {testmanaged-clmauto3.my.salesforce.com} with your Salesforce org path.

## Versions

The DocuSign Services API ensures backward compatibility by properly versioning any changes to the APIs. Should changes to the API structure need to be made, it will occur within a new version and older functionality will be preserved.

## Content Type

Requests made to the API must be encoded as **JSON** and contain the header

```
Content-Type: application/json
```

## Includes

You can easily include resource relationships on most top-level resources. Multiple includes are defined using comma-delimited values.

## Caching

Server side caching is used and can be configured per request using the `cacheStrategy` query parameter.

## Errors

Any request that returns an error follows a standard format. The DocuSign Services API will return an array of errors that contains objects containing the status, title, and data with the error details.

Code	Response
200	Success
400	Invalid JSON
500	Something went wrong on our end

(Open API documentation is only available to view online)

# DocuSign Services Features by Release

Review the latest DocuSign Services Features by Release document.

- [Features by Release](#)

## Features by Release

This document contains an overview of features introduced in each major release of DocuSign Services. For more information, see [DocuSign Services Features by Release](#).

# Community & Learning Center Resources

The Conga Customer Community is your one-stop shop for success!

After registering as a new member you'll gain access to a wide variety of resources, including: further details regarding the onboarding process, access to the knowledge base, and product-specific discussion groups.

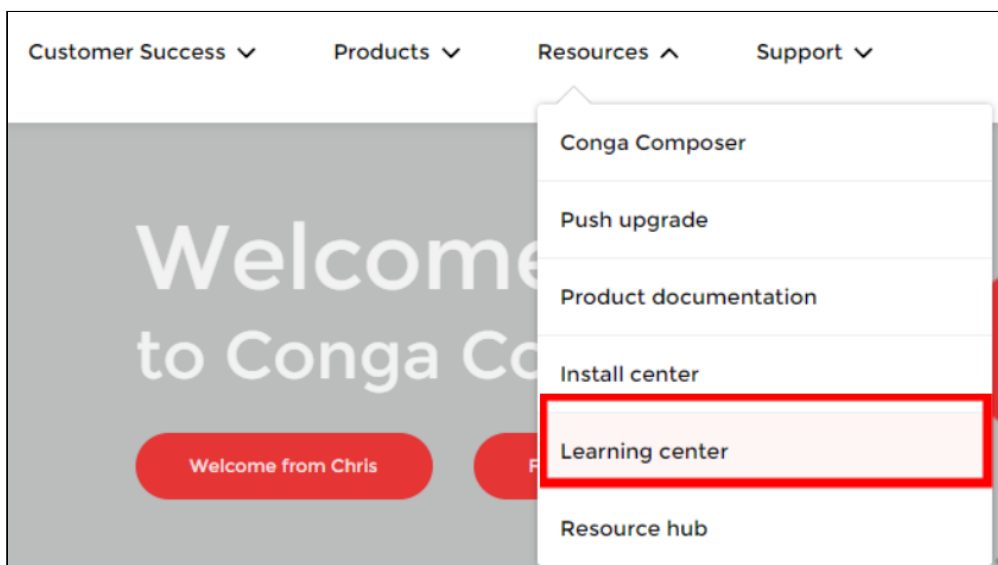
In addition, just a click away from Community is the Conga Learning Center: our comprehensive training portal well stocked with FREE self-paced courses complimented by virtual instructor-led sessions for more advanced and intensive training!

## Ready to get started?

First download the [Salesforce Authenticator app](#); you'll need it as part of the login procedure.

Then create a Community account, or log in [here](#)!

Once you're logged in, navigate to the Resources dropdown menu and click Learning Center to reach the [Conga Learning Center](#)!



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