Apttus Adobe Sign Services on Salesforce

Spring 2020 Integration Guide

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About this Guide

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

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

What's New

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

Document	Topic	Description
Spring 2020 Rev B	Upgrading Apttus Adobe Sign Services	Modified topic.
Spring 2020 Rev A	Installing the Apttus Adobe Sign Packages	Modified topic. Updated the topic for language and style changes.
	Post-Installation Configuration	Modified topic. eSign Services Admin Settings is renamed to Adobe Sign Admin Settings.
	Configuring Adobe Sign Admin Settings	Modified topic. eSign Services Admin Settings is renamed to Adobe Sign Admin Settings.
	Basic Customization	Modified topic. • eSign Services Admin Settings is renamed to Adobe Sign Admin Settings. • Updated the screenshot
	Creating Agreement Templates	Modified topic. Updated the topic to include the UI changes.
	Adding the Audit Trail	Modified topic. Updated the steps to disable the audit trail setting.
	Selecting Attachments and Templates	Modified topic. Updated the Custom Settings table.
	Managing Adobe Sign Actions	Modified topic. Updated the topic for language and style changes.
Spring 2020	Upgrading Apttus Adobe Sign Services	New topic. Contains information about upgrading from the previous two releases to the current release.
	System Properties	Modified topic. Updated the topic to include the system property, Bypass Sharing.
Winter 2019	N/A	No new features were added for this release. The guide was updated to reflect product name changes.

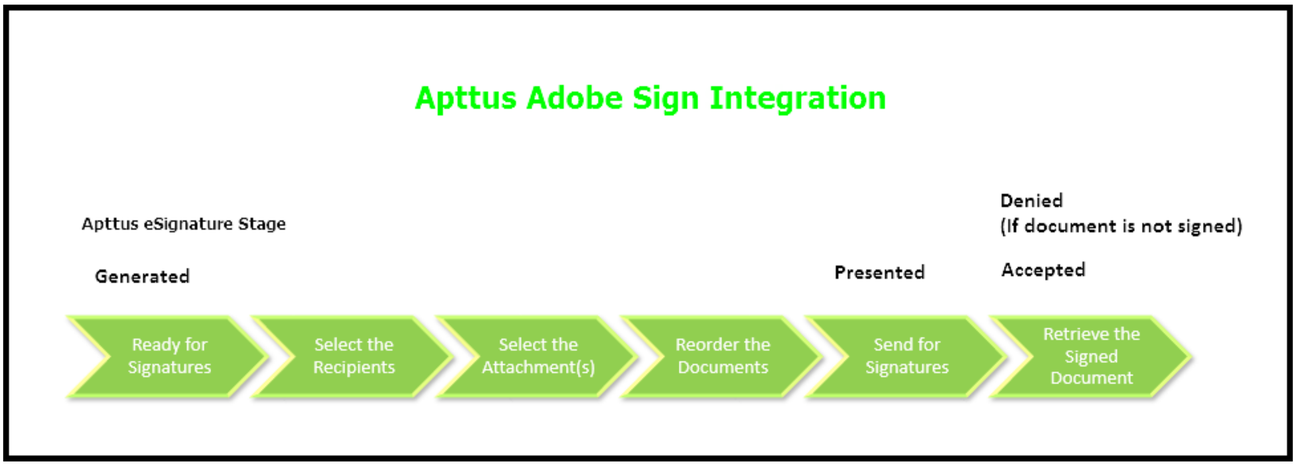
Document	Topic	Description
Summer 2019	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Winter 2018	N/A	No new features were added for this release. The guide was updated to reflect product name changes.

About Apttus Adobe Sign Services

Apttus Adobe Sign Integration helps collect signatures and close deals quickly by making it easy for approvers inside and outside your organization to sign documents.

Apttus Adobe Sign Integration Life cycle

A document can be sent for electronic signature from an agreement. Click the Send for eSignature button to go to Attachment Selection page from where you can select the documents to be sent to the recipient. If you select multiple documents then you will be directed to Order Attachments page, or, you will be directed to Adobe Sign Actions page. On the Order Attachments page, you can reorder the attachments and the final document contains more than one attachments as ordered by you. The final document is sent for signature. After the recipient signs the document, the user can retrieve the signed document via email. The Apttus eSignature Stage/Status field changes according to the activities. The signature stages/statuses are shown in the Apttus Adobe Sign Integration Life cycle. The activities that you perform are stored in the Activity History related list.



Rebranding

Previously, the product was called Adobe EchoSign (Adobe eSign Services or Adobe Document Cloud). Now, it's called Adobe Sign. Hence, our connector is now called Apttus Adobe Sign Integration.

Apttus Adobe Sign Services allows a user to perform the following tasks:

- Create agreement templates
- Enable or disable audit trail

- Configure mappings
- Send an agreement for eSignature
    - Add or delete attachments
    - Add attachments from related agreements
- Add or delete recipients
- Add multiple signers
- View Signed documents
- Finalize in eSign

Key Terminology

It is important to understand how terms are used when working with Apttus Adobe Sign Services application.

Term	Definition
Agreement	The set of terms and conditions agreed between two or more parties. An Apttus Agreement consists of structured Salesforce data and stored language dynamically generated into a static document.
Finalize in eSign Server	A feature that allows you to open the envelope inside the Adobe Sign console.

Installing Apttus Adobe Sign Services

- Apttus Adobe Sign Integration Packages Required
  The required packages to run Apttus Adobe Sign Integration.
- 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.
- Upgrading Apttus Adobe Sign Services
  The steps required to upgrade Apttus Adobe Sign Services.

Installing the Apttus Adobe Sign Packages

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

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

Install the packages in the following order.

Order	Package	Install Center tab to access the package	Required?
1	Apttus Contract Management	Contract Management	Y
2	Apttus Proposal Management	CPQ	Y
3	Adobe Sign	NA	Y
4	Apttus Contract EchoSign Integration	Echosign Integration	Y
5	Apttus Quote/Proposal EchoSign Integration	Echosign Integration	Y

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

To install Adobe Sign packages

1. Go to appexchange.salesforce.com.
2. Navigate to Adobe Sign and click **Get It Now.**
3. Click the environment where you want to install the package and follow the instructions on the page.
4. Verify the package installation details and click **Continue.**
5. Review the package API access and click **Next.**

    > Ensure you have checked the I have read and agree to the terms and conditions checkbox.

6. Select the profile for which you want to install the package. Apttus recommends that you select **Install for All Users**.
7. 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.
8. Click **Set**.
9. Click **Install.**

To install Apttus EchoSign Integration packages

> For agreement, you must install the *Apttus Contracts Management* package 8.325 or higher.
> For quotes, you must install the *Apttus Proposal Management* package 8.99 or higher.

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

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

Post-Installation Configuration

After installing the Adobe Sign packages, you must configure the following Adobe Sign Admin Settings.

- Configuring Adobe Sign Admin Settings
  Before you begin to create agreements, it is essential to configure the **Adobe Sign Admin Settings**.
- Basic Customization
  Customizing basic layout of the page like adding a Send button or adding a related list to the page can be performed.
- System Properties
  Customizing basic configurations as per your business requirements. Includes enabling features as well.

Configuring Adobe Sign Admin Settings

Before you begin to create agreement templates, it is essential to configure the **Adobe Sign Admin Settings.**

To configure the Adobe Sign Admin Settings

1. From the App Launcher, find and open the **Apttus Contract Management** app. You can perform the same action in Apttus Proposal Management app as well.
2. Click the **Adobe Sign Admin** tab from the navigation bar.
3. In the **Account Setting** section, click **Launch Setup Wizard**.
4. To Sign in to your Adobe account, click **Sign in to Adobe** and enter your Adobe provided login credentials. To create a new Adobe account, click **Sign up for a free trial** and follow the instruction on the page.
5. Click **Next**.
6. To enable the trusted IP Range, click **Enable Trusted IP Range 1** and click **Save**.

   > ⓘ You will get an auto-filled IP Address.

7. Click **Enable Trusted IP Range 2** and click **Save**.

   > ⓘ You will get an auto-filled IP Address.

8. Click **Next**.
9. Enter your Salesforce credentials.
10. Click **Save**.
11. Click **Next**.

Basic Customization

You can customize your page layouts as per your business requirements. For ease of access, you can add buttons, fields, and related list to your page layouts. Send for Signature button and Notes & Attachments related list are two of the important customizations.

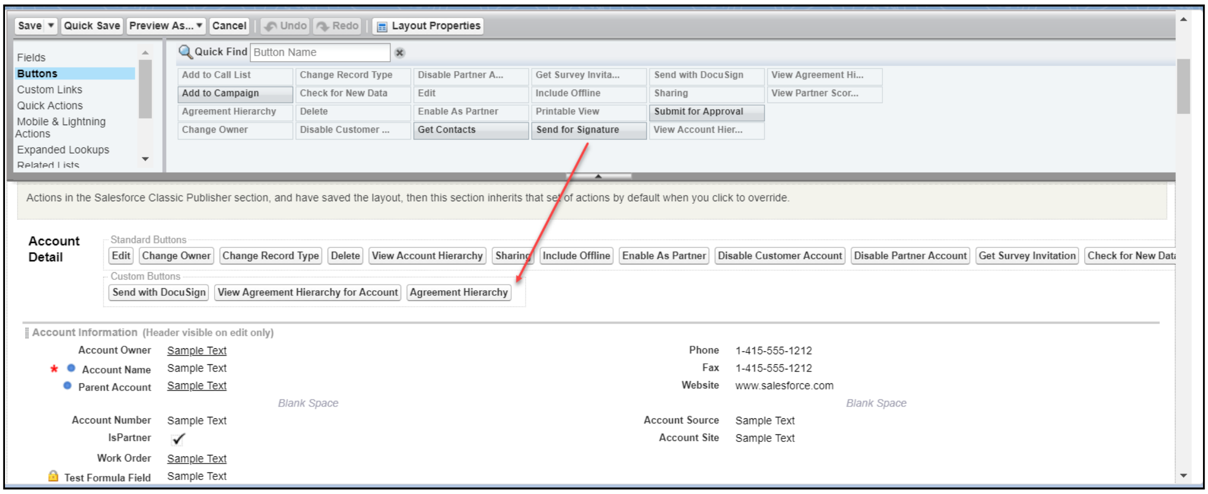
To add Send for Signature button to page layout

1. From the App Launcher, find and open the **Apttus Contract Management** app. You can perform the same action in Apttus Proposal Management app as well.
2. Click the **Adobe Sign Admin** tab from the navigation bar.
3. Click **Send for Signature Components**.
4. Click **Add to Account**.

Note

Page Layout customizations can be applied to Contacts, Contracts, Opportunities, and Leads or any custom object as well. Select the appropriate option.

5. Click **Page Layouts**.
6. Click **Edit** next to the Account Layout you want to customize.
7. Click **Buttons** on the layout editor.
8. Drag and drop **Send for Signature** to the **Custom Buttons** section on the page layout below.



9. Click **Save**.

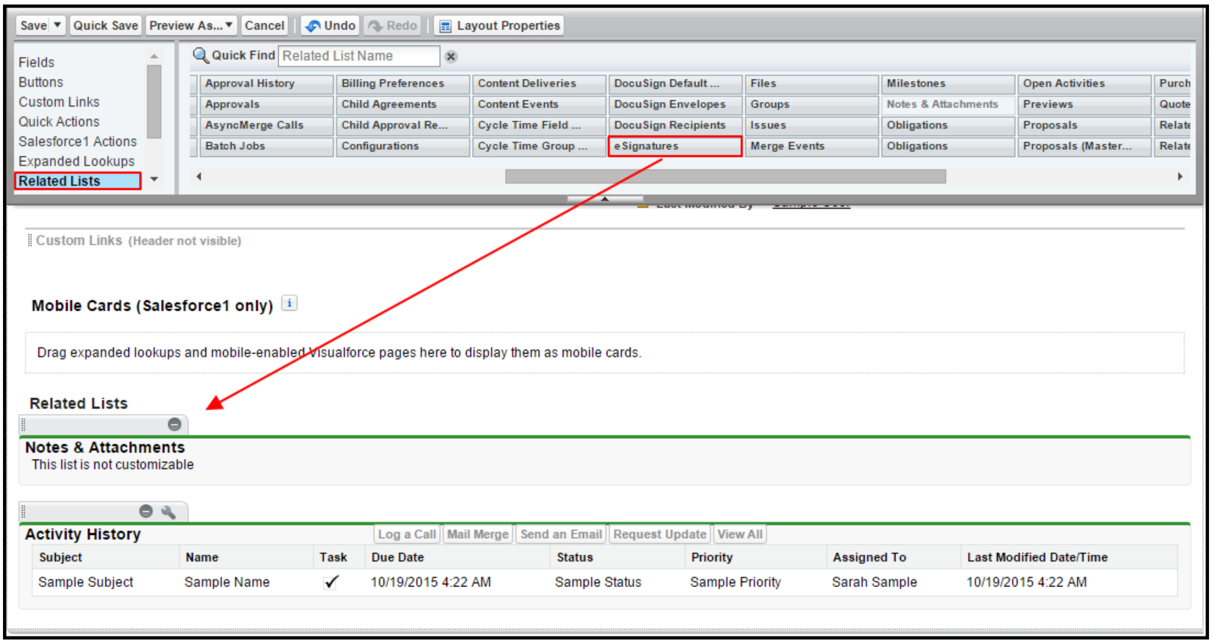
To add a related list to page layout

1. From the App Launcher, find and open the **Apttus Contract Management** app.
2. Click the **Agreements** tab from the navigation bar. You can perform the same action on the Proposals tab in Apttus Proposal Management app as well.

Note

Select the appropriate object. You can add a related list to objects like Contacts, Proposals, Opportunities, and more.

3. Select an agreement and click the **Edit Layout** link.
4. From the layout pane, click **Related Lists.**
5. Drag and drop the appropriate related list to the appropriate location. It is recommended to have eSignatures, Document Versions, and Notes & Attachments related lists in the page layout for agreement or quote/proposal.



6. Click **Save**.

System Properties

You must create the System Properties record under the Apttus-Adobe eSignature Properties custom setting with the API Name **ApttusAdobeESignatureProperties__c.**

To create system properties record

1. Go to **Setup** > **Build** > **Develop** > **Custom Settings** and click **Manage** for Apttus-Adobe eSignature Properties.
2. Click **New**.
3. Enter the **Name** as System Properties.
4. Select the **Force Selections** check box if you want to force your users to select Attachment(s) and a Template when available, while sending a document for eSignature.
5. Click **Save**.

The following managed properties are used throughout this document.

Setup > Build > Develop > Custom Settings > Apttus-Adobe eSignature Properties > System Properties	
Name	**Description**
Force Selections	Select this option if you want to force your users to select Attachment(s) and a Template when available, while sending a document for eSignature. If checked, the system throws an error if the user does not select attachment(s) and a template, when available. If unchecked, the system does not throw any error, even if the user does not select the template, when available.
Don't Copy Signed Documents (For Contract Management and Quote/Proposal connector)	Select this option if you do not want the system to copy your signed documents from Adobe to Apttus' Agreement or Quote/Proposal record. If checked, the system will not copy your signed documents from Adobe to Apttus' Agreement or Quote/Proposal record. And, the system will update the record's Activity History and the Status. If unchecked, the system will copy your signed documents from Adobe to Apttus' Agreement or Quote/Proposal record.
Hide Related Agreement Selection (For Contract Management)	Select this option if you want to hide the option for Related Agreement Selection. If checked, the users will not see the Related/Child/Parent/Sibling agreements on the Select Attachment user interface. If unchecked, the users will see the Related/Child/Parent/Sibling Agreements on the Select Attachment user interface.

Setup > Build > Develop > Custom Settings > Apttus-Adobe eSignature Properties > System Properties	
Name	**Description**
Update Related Agreements (For Contract Management)	Select this check box if you want to update the Agreement Status of all Related Agreements. If checked the status of Related/Child/Parent/Sibling agreements will be updated if they are selected while sending for eSignature. Also, the signed documents will be returned back to the respective Related/Child/Parent/Sibling agreements. If unchecked, the status of only the Primary Agreement will be updated and signed documents will be returned back to the Primary Agreement only. **Note:** If you select Update Related Agreements checkbox, you must select Don't Copy Signed Documents check box to avoid redundant documents through product trigger. If you want to ensure that the signed agreements are returned back to their respective records, you must add custom code in your org. For more information on returning back signed agreements, refer to Selecting Attachments and Templates.
Bypass Sharing	Select this checkbox to bypass the Org Sharing Settings set for **Agreement Template** object. If you select this check box, all the agreement templates are made available to the logged-in user to select while sending an agreement for eSignature. If you do not select this check box, the availability of templates is based on the access setting specified in the Org Sharing Settings for **Agreement Template** object.

Upgrading Apttus Adobe Sign Services

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

ⓘ If you have not installed Apttus Adobe Sign Services, you can contact Apttus Support to request for an installation link, then perform the standard installation as described in Installing Apttus Adobe Sign Services.

Preparing for Upgrade

Before you upgrade to Apttus Adobe Sign Services on Salesforce Spring 2020, you must ensure the following:

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

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

Upgrading to Apttus Adobe Sign Services on Salesforce Spring 2020

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

Upgrading Apttus Adobe Sign Services from Winter 2019 to Spring 2020

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

Product	Package Version (Name | Number)
Adobe Sign	21.5
Apttus EchoSign Integration	7.2.0030 | 7.30
Apttus Quote/Proposal EchoSign Integration	1.0.12 | 1.12

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

Product	Package Version (Name | Number)
Adobe Sign	21.5
Apttus Contract Management	11.0.0519 | 11.519
Apttus Contract EchoSign Integration	8.0.0034 | 8.34
Apttus Quote/Proposal EchoSign Integration	1.0.12 | 1.12
Apttus Proposal Management	9.2.0206 | 9.206

3. Perform the upgrade. The upgrade procedure is the same as the installation procedure. For detailed information on installing Apttus Adobe Sign Services managed packages, see Installing the Apttus Adobe Sign Services Packages.

Upgrading Apttus Adobe Sign Services from Summer 2019 to Spring 2020

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

Product	Package Version (Name | Number)
Adobe Sign	21.5
Apttus EchoSign Integration	6.0.0024 | 6.0.0024
Apttus Quote/Proposal EchoSign Integration	1.0.0010 | 1.10

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

Product	Package Version (Name | Number)
Adobe Sign	21.5
Apttus Contract Management	11.0.0519 | 11.519
Apttus Contract EchoSign Integration	8.0.0034 | 8.34

Product	Package Version (Name | Number)
Apttus Quote/Proposal EchoSign Integration	1.0.12 | 1.12
Apttus Proposal Management	9.2.0206 | 9.206

3. Perform the upgrade. The upgrade procedure is the same as the installation procedure. For detailed information on installing Apttus Adobe Sign Services managed packages, see Installing the Apttus Adobe Sign Services Packages.

Creating Agreement Templates

Agreement Templates provide an efficient way of setting up the default values and settings for your agreements. Agreement Templates include predefining agreement fields like Agreement Name, Message, Signature Type, Language, various Agreement Options, various Agreement Security options, and Mapping Options. You can preset the recipient details, file attachments, expiration date, days until expiration, reminders as well.

To create an agreement template

1. From the App Launcher, find and open the **Apttus Contract Management** app. You can perform the same action in Apttus Proposal Management app as well.
2. Click the **Agreement Templates** tab from the navigation bar.
3. Click **New**.
4. Enter the **Template Name** and click **Save.**
5. Provide requisite information for the fields pertaining to the **Template Details** tab. The Template Details has the core details that relate the agreements created by the template with the referencing Salesforce object.

Field Name	Description
Agreement Name	Enter a name for the agreement or accept the default name. All agreements are initially created with this name.
Salesforce Object	Select the Salesforce Master Object to be referenced for this agreement template (e.g. Account, Opportunity, Agreement).
Mapped Data	Click **Map data into agreement fields** to define the mapping of fields. Select one of the following **Mapping Method**: • **Select from Object** - Select this option to map a field of selected Salesforce object to an agreement field. • **Input Specific Value** - Select this option to map a specific field to an agreement field. Click **Save**.

Field Name	Description
Auto Send	Enable this option if you want to automatically send an agreement after you click the **Send for Signature** button. The preview of the agreement is not displayed. For Auto Send to work, you must have at least one recipient and attachment defined in the agreement template.
Advanced Options	
Agreement Type	Select an agreement type.
Language	Select the language of the recipients.
Select the signature type for this agreement	Select the default value for the signature type to be collected: • **E-Signature** - Electronic signatures will be collected by default. • **Written Signature** - Recipients will be instructed to download the document, physically sign it, scan the signed document, and upload that document to Adobe Sign.

6. Attach the documents that the recipient should sign in the **Attachment** tab. If no documents are attached to the template, you need to select the document when configuring the agreement.
   Enter the following information, as required.

Field Name	Description
Upload to add a document	Add a file via drag-and-drop from the desktop or upload a file through a menu driven wizard.
Select to add documents	You can search for a document by specific libraries using the Search bar under the radio button options: • **Salesforce CRM & Files** - Your personal library. Any documents you upload from your system are stored in this library for future use. • **Salesforce Documents** - The Salesforce library that is shared amongst users. • **Adobe Sign Library** - The library content stored in the Adobe Sign system.

<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td colspan="2">Advanced Options</td></tr>
<tr><td>Add a document from object or runtime variable</td><td>Select a document or object from a Salesforce object or runtime variable.

Some salesforce master objects offer additional options for the source of the document (e.g., If the Salesforce Object defined on the Template Details tab is Opportunity, you will have an additional source option of Add from Opportunity Quote).

There are three options:

Add from Salesforce Object

Source Type - Choose the object type for the document between File or Attachment.
Document Selection - Select the document to attach based on one of these criteria:
Latest Document
Oldest Document
All Documents
Document Selection Determined By - Select how the file selection is determined for latest or oldest files.

Add from Opportunity Quote - Define the following fields, as required.

Quote Type - Select which quote object to use for document selection.
Quote Type Determined By - Select how the quote selection is determined for latest or oldest files.
Quote Document Type - Select which quote document to add from:
Latest Document
Oldest Document
All Documents

Runtime Variable - Dynamically add an attachment from an object.

Add a runtime variable name - Specify the variable and ID type from your Salesforce object.

</td></tr>
</table>

Field Name	Description
Add Form Field Template	Import a field template from the Adobe Sign library.

7. Configure the recipients in the **Recipients** tab.

Field Name	Description
Signing Workflow	Select one of the following option: • **All Recipients Sign** - All of the recipients defined in the template will be required to participate in the process, according to the roles applied to them. This is the setting for all agreements that aren't expected to be signed by the sender only. • **Only Sender Signs** - Enable this option to add the "Only I Sign" functionality to the template.
Recipients	Recipients can be added by: • **Salesforce Object** • **Email** • **Runtime Variable**
Message	Enter the message that you want to deliver to the recipients. The Message section imports the **Agreement Name** from the **Template Details** tab.
Advanced Options	
Enable Hosted Signature (in-person signature)	Enable to facilitate hosted, in-person signing if the signer is available.
Enable Preview and Position Fields	Enable this option to allow you to preview the agreement and to drag-and-drop form fields on to it before sending it out for signature.
Send on Behalf of	Enter the user on behalf of whom you want to send the agreement if it is sent automatically; else the agreement will be sent on behalf of the current user.
Advanced Verification Methods	You can configure the verification methods for recipients if you are controlling signer verification based on Internal / External recipient status.

8. Configure the merge mapping or data mapping in the **Data Mapping** tab.

- **Merge Mapping** - Select a data mapping to merge Salesforce fields into an agreement before sending it.
- **Data Mapping** - Select a data mapping to be used to map inputs from a signed agreement back into Salesforce.

9. Configure any additional **Rules** to automate common agreement tasks.

Field Name	Description
Automatic Reminders	Select an option for automatic reminders. The options are *Never*, *Every Day, Until Signed*; or *Every Week, Until Signed.*
Days Until Expiration	Enter the number of days until the signature request expires.
Post Sign Redirect URL	Enter a URL to automatically redirect the signers of an agreement to a specified URL after they sign.
Post Sign Redirect Delay	If the **Enable Post Sign Options** setting is enabled and a **Post Sign Redirect URL** is specified, enter the number of seconds that should elapse before executing the redirect.
Password protect the signed document	Enable this option to encrypt the signed PDF that is sent to signers.
Set as default template for all agreements	Enable this option if you want to set this as the Default agreement template for your new agreements.
Enabled as a Chatter Publisher Actions	If you have enabled **Chatter Publisher Actions** on your Org, then you can check this box to enable this Agreement Template. The Chatter Publisher Action allows you to send agreements from Chatter.

10. Click **Save**.

Adding the Audit Trail

Audit Trail is a separate document that Adobe provides when generating the final signed document. Once the agreement is signed, a signed copy of the PDF is stored within our application. Apttus Connector grabs the last generated document from Adobe. If the custom setting for the audit trail is enabled, then either the audit trail document will be generated last, or the final signed document will be generated last. In either case, only the last document is grabbed.

To add the audit trail document, you must

1. Disable Audit Trail setting
2. Set up File Mapping for audit trail
3. Send for Signature

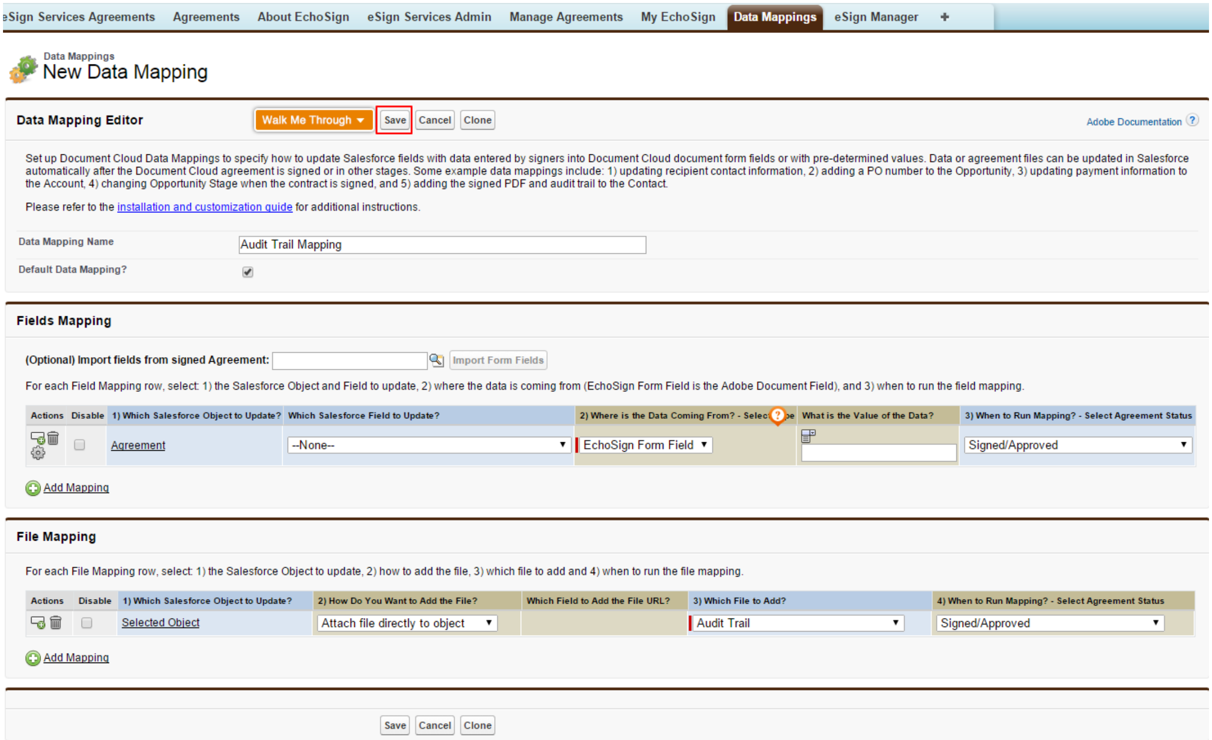
To disable audit trail setting

1. Go to **Setup** > **Develop** > **Custom Settings**.
2. Click **Manage** for **Adobe Sign Settings**.
3. Deselect **Add Audit PDF to Attachment List** checkbox.
4. Click **Save**.

To set up file mapping for audit trail

1. From the App Launcher, find and open the **Apttus Contract Management** app. You can perform the same action in Apttus Proposal Management app as well.
2. Click the **Data Mappings** tab from the navigation bar.
3. Click **New**.
4. Enter the **Data Mapping Name**.
5. Select **Default Data Mapping** check box.
6. Under the **Fields Mapping** section, click **Add Mapping**.
7. Click **Selected Object** link and select **Apttus Agreement** from the picklist menu.
8. Click **Select**.
9. Under the File Mapping section, click **Add Mapping**.
10. From **Which File to Add?** picklist menu, select **Audit Trail**.

11. Click **Save**.



For more information on sending a document for eSignature, refer to Sending for eSignature.

Configuring Mappings

Adobe Sign enables you to map data back and forth between the agreement and the Salesforce org. For detailed information on Mappings, refer to.

Mapping	Link
Merge Mappings	https://helpx.adobe.com/content/dam/help/en/sign/Adobe_Sign_Best_Practices_SFDC.PDF
Data Mappings	https://helpx.adobe.com/content/dam/help/en/sign/Adobe_Sign_Best_Practices_SFDC.PDF

Sending for eSignature

Agreements or Quote/Proposals can be sent for eSignature using Apttus Adobe Integration. You must have an existing agreement template, a word file or an existing document on Salesforce to send your document for eSignature to your recipients.

- Adding Attachments
- Selecting Attachments and Templates
- Managing Adobe Sign Actions

Adding Attachments

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

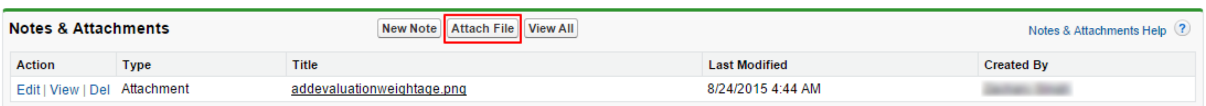
You can add an attachment in one of the following ways.

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

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

To attach a document manually

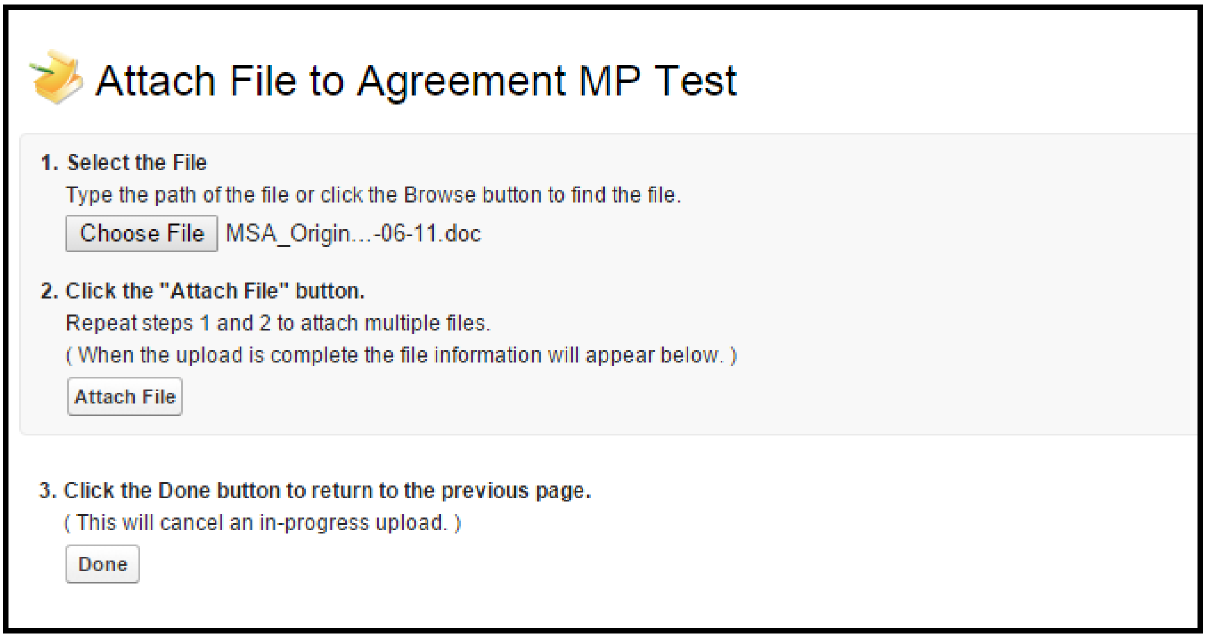
1. Select the agreement that you want to attach the document.
2. Under the Notes & Attachments related list, click **Attach File**.



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 it will not be included in the envelope being sent for eSignature.

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



Selecting Attachments and Templates

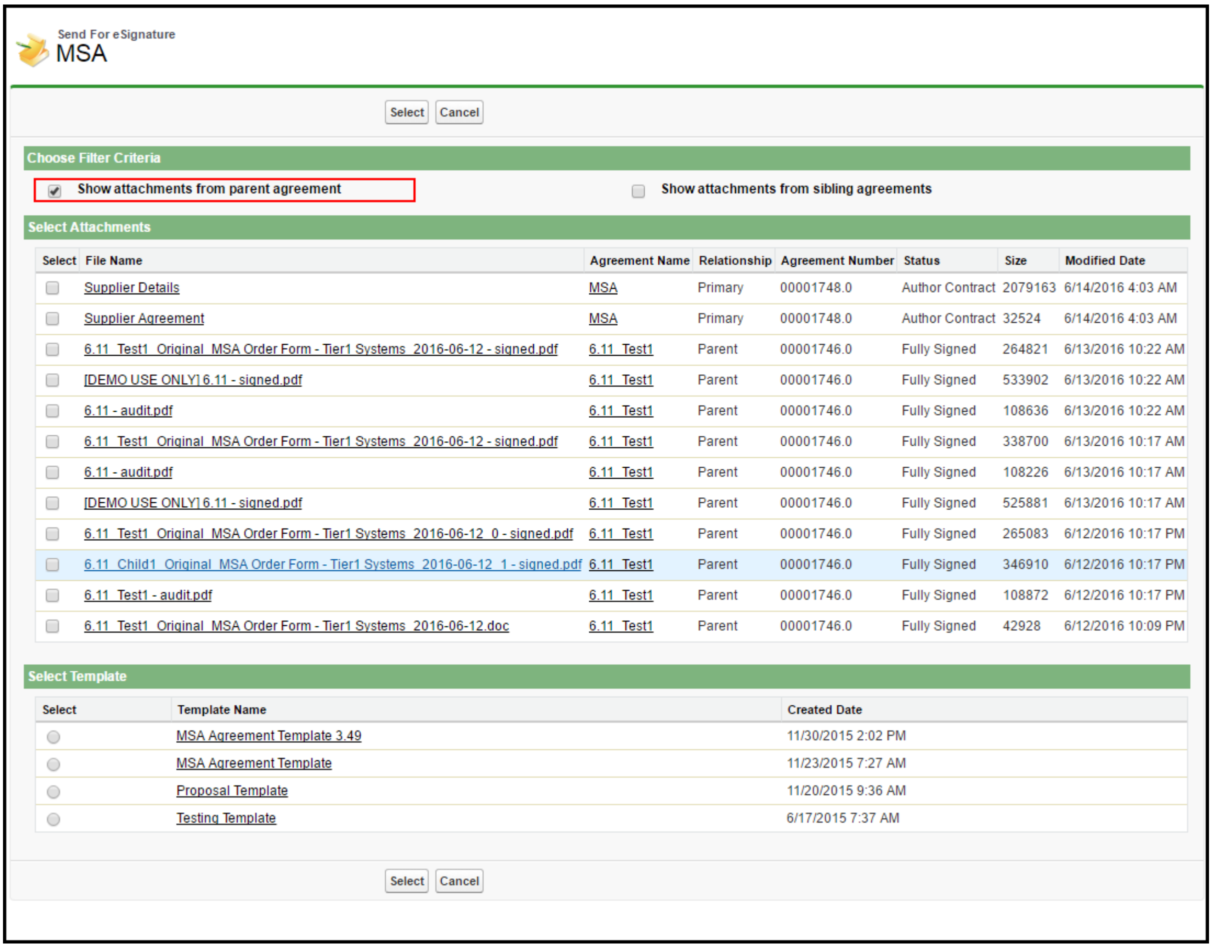
After adding the attachments manually to the Notes & Attachments related list, you must click **eSignature** button. Once you click eSignature button, you are redirected to Attachments and Template selection page.

To select attachment and template

1. Click the **eSignature** button. All the attachments that you have added in the Notes & Attachments related list are displayed in the Select Attachments section, on Attachments and Template Selection page.
2. Select the **Show attachments from parent agreement** check box to display the documents, added in Notes & Attachments related list, in the Select Attachments section.

-or-
Select the **Show attachments from sibling agreements** check box to display the documents, added in Notes & Attachments related list, in the Select Attachments section.
-or-
Select the **Show attachments from child agreements** check box to display the documents, added in Notes & Attachments related list, in the Select Attachments section.

> **Note**
>
> The visibility of Show attachments from parent agreement and Show attachments from sibling agreements depends on the **Hide Related Agreement Selection** custom setting. For more information on custom settings, refer to System Properties.


Send For eSignature
MSA

Select Cancel

Choose Filter Criteria

Show attachments from parent agreement   Show attachments from sibling agreements

Select Attachments

Select	File Name	Agreement Name	Relationship	Agreement Number	Status	Size	Modified Date
	Supplier Details	MSA	Primary	00001748.0	Author Contract	2079163	6/14/2016 4:03 AM
	Supplier Agreement	MSA	Primary	00001748.0	Author Contract	32524	6/14/2016 4:03 AM
	6.11_Test1_Original_MSA Order Form - Tier1 Systems_2016-06-12 - signed.pdf	6.11_Test1	Parent	00001746.0	Fully Signed	264821	6/13/2016 10:22 AM
	[DEMO USE ONLY] 6.11 - signed.pdf	6.11_Test1	Parent	00001746.0	Fully Signed	533902	6/13/2016 10:22 AM
	6.11 - audit.pdf	6.11_Test1	Parent	00001746.0	Fully Signed	108636	6/13/2016 10:22 AM
	6.11_Test1_Original_MSA Order Form - Tier1 Systems_2016-06-12 - signed.pdf	6.11_Test1	Parent	00001746.0	Fully Signed	338700	6/13/2016 10:17 AM
	6.11 - audit.pdf	6.11_Test1	Parent	00001746.0	Fully Signed	108226	6/13/2016 10:17 AM
	[DEMO USE ONLY] 6.11 - signed.pdf	6.11_Test1	Parent	00001746.0	Fully Signed	525881	6/13/2016 10:17 AM
	6.11_Test1_Original_MSA Order Form - Tier1 Systems_2016-06-12_0 - signed.pdf	6.11_Test1	Parent	00001746.0	Fully Signed	265083	6/12/2016 10:17 PM
	6.11_Child1_Original_MSA Order Form - Tier1 Systems_2016-06-12_1 - signed.pdf	6.11_Test1	Parent	00001746.0	Fully Signed	346910	6/12/2016 10:17 PM
	6.11_Test1 - audit.pdf	6.11_Test1	Parent	00001746.0	Fully Signed	108872	6/12/2016 10:17 PM
	6.11_Test1_Original_MSA Order Form - Tier1 Systems_2016-06-12.doc	6.11_Test1	Parent	00001746.0	Fully Signed	42928	6/12/2016 10:09 PM

Select Template

Select	Template Name	Created Date
	MSA Agreement Template 3.49	11/30/2015 2:02 PM
	MSA Agreement Template	11/23/2015 7:27 AM
	Proposal Template	11/20/2015 9:36 AM
	Testing Template	6/17/2015 7:37 AM

Select Cancel

3. Select the attachments that you want to send for eSignature. You can select multiple attachments.
4. Under the Select Templates section, all the Agreement Templates that are available are displayed. Select a template that you want to use to send your document for eSignature.
5. Click **Select**. You will be redirected to Adobe Sign Actions page.

You have selected the attachment(s) and template. Now you can perform Adobe Sign Actions.

Sending Documents with Related Agreements

Apttus Adobe Integration enables you to select attachments from the related/sibling/parent/child agreements as well. This feature is controlled by the **Hide Related Agreement Selection** custom setting in Apttus-Adobe eSignature Properties. To ensure that the signed documents are returned back to the respective related/sibling/parent/child agreement records, you must add the **Attachment Trigger** custom code in your Salesforce org.
The table below represents the scenarios and behavior of various custom settings. The following custom settings might affect your system, collectively.

Hide Related Agreement Selection checked?	Don't Copy Signed Documents checked?	Update Related Agreements checked?	Result
Yes	Yes	Yes	The user will be able to select documents from the primary agreement only. After the document(s) are signed, the signed agreements are not copied to Apttus' Agreements record and the Agreement Status is updated only in primary agreement.
Yes	Yes	No	The user will be able to select documents from the primary agreement only. After the document(s) are signed, the signed agreements are not copied to Apttus' Agreements record and the Agreement Status is updated only in primary agreement.
Yes	No	No	The user will be able to select documents from the primary agreement only. After the document(s) are signed, the signed agreements are copied to Apttus' Agreements record and the Agreement Status is updated only in primary agreement.

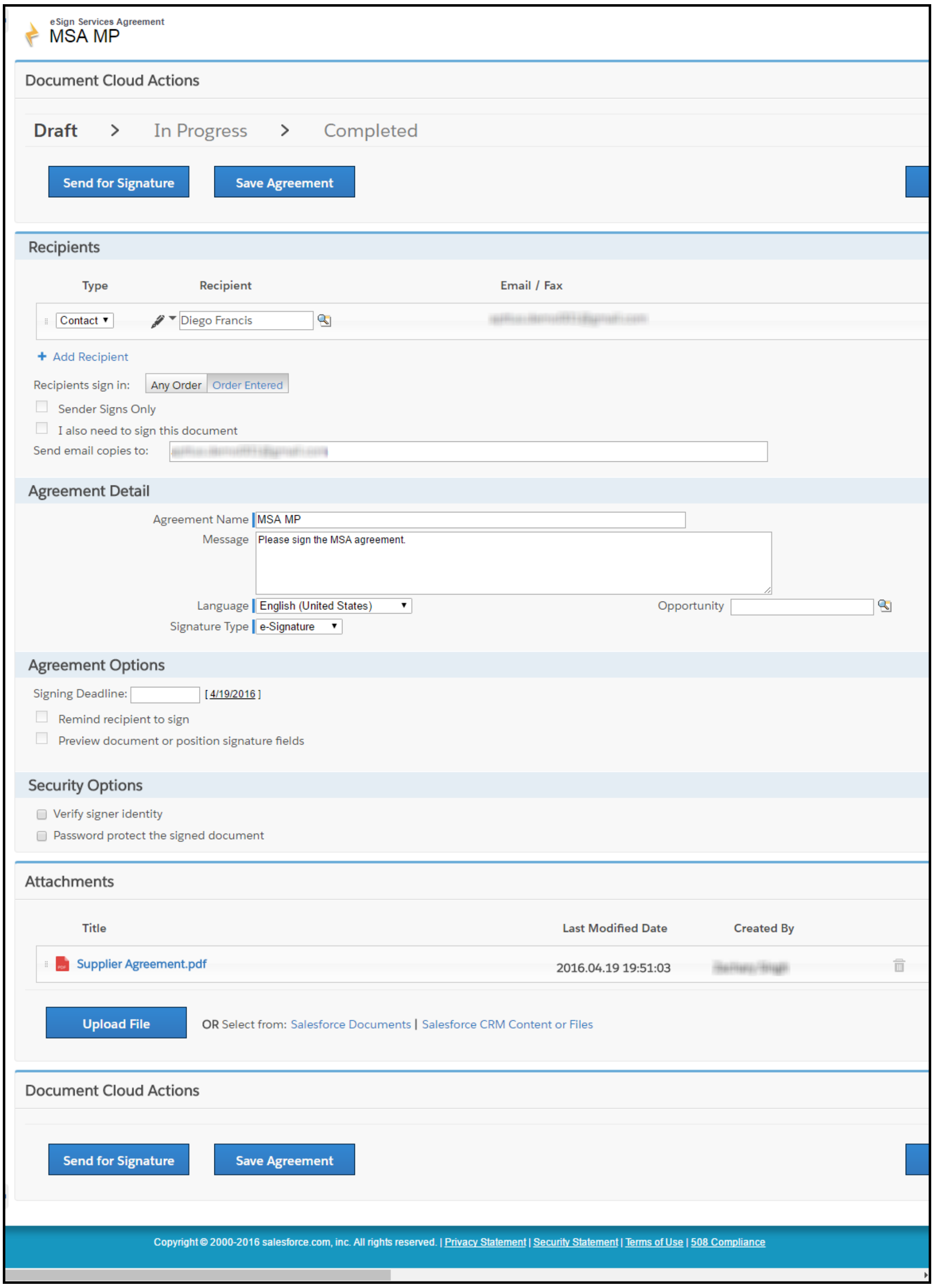
Hide Related Agreement Selection checked?	Don't Copy Signed Documents checked?	Update Related Agreements checked?	Result
No	Yes	Yes	The user will be able to select documents from both primary and related/parent/sibling/child agreements. After the document(s) are signed, the signed agreements are not copied to Apttus' Agreements record and the Agreement Status is updated in both primary and related/parent/sibling/child agreements.
No	Yes	No	The user will be able to select documents from both primary and related/parent/sibling/child agreements. After the document(s) are signed, the signed agreements are not copied to Apttus' Agreements record and the Agreement Status is updated only in primary agreement.
No	No	Yes	The user will be able to select documents from both primary and related/parent/sibling/child agreements. After the document(s) are signed, the signed agreements are copied to Apttus' Agreements record and the Agreement Status is updated in both primary and related/parent/sibling/child agreements.

Hide Related Agreement Selection checked?	Don't Copy Signed Documents checked?	Update Related Agreements checked?	Result
Yes	No	Yes	The user will be able to select documents from the primary agreement only. After the document(s) are signed, the signed agreements are copied to Apttus' Agreements record and the Agreement Status is updated only in primary agreement.
No	No	No	The user will be able to select documents from both primary and related/parent/sibling/child agreements. After the document(s) are signed, the signed agreements are copied to Apttus' Agreements record and the Agreement Status is updated only in primary agreement.

Contact Apttus Support for the custom configuration and the steps to implement the custom configuration in your Salesforce org.

Managing Adobe Sign Actions

Adobe Sign Actions enables the user to verify and update the Agreement settings like the Recipients, Signing Order, Agreement Details like Name, Message, Language, and Signature Type, Reminders, Agreement Deadline, Security Options like Password Protection, and the Attachments to be sent for eSignature. The user can save or delete the agreement as well.



To manage Adobe Sign actions

1. Under the Recipients section, select the **Recipient Type**. The available options are.

Option	Description
Contact	Select this option if you want to select an existing Contact as a recipient.

Option	Description
User	Select this option if you want to select an existing User as a recipient.
Email	Select this option if you want to enter the name and email address manually.
Lead	Select this option if you want to enter an existing Lead as a recipient.

2. Click the icon for **Recipient** to look up the recipient.
   -or-
   Enter the email address of the recipient in the **Email** text box, if you have selected Email as the Recipient Type.
3. Click **Add Recipient** and perform steps 2 and 3, if there is a requirement to add more recipients.
4. If you have entered multiple recipients, you can perform any of the following steps, if required.
   - Drag and drop the recipient to change the signing order.
   - For **Recipients Sign in**, select any of the following options.
     - **Any Order** - Select this option if you want to allow the recipients to sign the document in any order.
     - **Order Entered** - Select this option if you want to allow the recipients to sign the document in the order mentioned above.
   - Select the **Sender Signs Only**, if you want only your recipient to sign the document.
   - Select the **I also need to sign this document**, if you, as a user, want to sign the document as well. If you select this option, you will have the option of selecting whether you want to sign the document first or last. Click **First** if you want to sign the document before your recipient signs the document. Click **Last** if you want to sign the document after your recipients sign the document.
   - Enter the email address of the recipients in the **Send email copies to** to send the copies of the document to the mentioned email addresses.
5. Under the **Agreement Detail** section, enter the **Agreement Name** and **Message** (if any) for the recipient.
6. Select **Language**.
7. Select the **Signature Type**. The available options are:
   - **eSignature**
   - **Fax Signature**

8. For **Opportunity**, click the icon and select an opportunity that you want to associate with this agreement.
9. Under the **Agreement Options** section, select the appropriate **Signing Deadline Date** for the agreement.
10. Select the **Remind the Recipient to Sign** to enable the reminder for the document you want to send. You can select the frequency of reminders as well. The available options are.

Option	Description
Never	Select this option if you do not want to send any reminder to your recipient(s).
Every Day, Until Signed	Select this option if you want to send a reminder to your recipient to sign the document, every day.
Every Week, Until Signed	Select this option if you want to send a reminder to your recipient to sign the document, every week.

11. Select the **Preview document or position signature fields** , If you want to preview the document or update the position of signature fields before the document is sent for eSignature.
12. Under the **Security Options** section, select the **Verify signer identity**,if you want to verify the identity of your recipients. Further, the available options are.

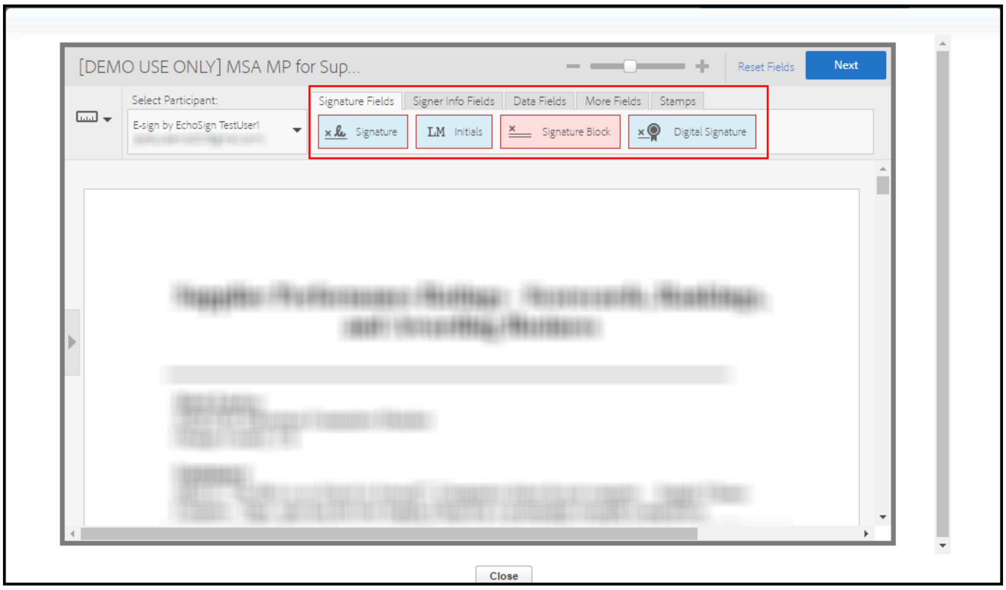
Option	Description
Password to sign agreement - Select this option if you want your recipients to enter a password for the document that you send.	
Password	Enter the password for your document.
Confirm Password	Re-enter the password for your document.
Knowledge-based authentication - Select this option if you want your recipients to answer a question for the document that you send.	
Question	Enter a question for the recipient(s) to answer.
Answer	Enter the answer to the question that recipients must answer to open the document that you have sent.
Web-based authentication - Select this option if you want your recipients to log in with their social media account, such as Google, LinkedIn, Facebook before viewing and signing the document.	

Option	Description
Social	Select the social media account that you wish to use for web-based authentication.

13. Select the **Password Protect the signed document** to force users to enter the password before they open the document that you have sent. You must enter the password in **Password** text box.
14. If you want to add more documents to the existing attachments, for eSignature, click **Upload File** and upload the document that you want to send.

> **Note**
>
> Salesforce documents and content files can also be added as agreements. To do so click on **Salesforce Content or CRM Files** and search for the appropriate document. Click **Salesforce Documents** if your agreement already exists as any Salesforce documents.

15. Click **Choose File** and choose the document that you want to upload.
16. Click **Attach File**.
17. Click **Done**.
18. Click **Send for Signature**.
-or-
Click **Save Agreement** to save the agreement for now and sent it later on.
-or-
Click **Cancel** to go back to the agreements screen.

> ⓘ If **Preview document or position signature fields** checkbox is selected, a pop-up is displayed which allows you to position the signature fields. Drag the required fields to the intended area.
>
> 
>
>
> Click **Next** to send the document for eSignature.
> Click **Close** after you review the document that you have sent.

Apttus Adobe Sign Integration enables you to use Adobe Approvals to perform C2A (click-to-accept) on the agreement/proposal. When you approve a quote/proposal or agreement using Adobe Approvals, the status of the quote/proposal or agreement is automatically updated to **Fully Signed**.

FAQs

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

How do I set up a user?

You can set up a user from the **Adobe Sign Admin Settings** tab.

For more information on setting up a user, refer to Configuring Adobe Sign Admin Settings.

How do I add multiple signers in the document?

You can add multiple signers in the document. The order of the signers can also be specified.

To add multiple signers,

1. Click the **Agreements** tab.
2. Select the agreement that you want to send for signature.
3. Click **eSignature**. Ensure that you have attached at least one file in Notes & Attachments section.
4. Select the attachment and template.
5. Click **Select**.
6. On the Document Cloud Actions page, click **Add Recipient** and add as many recipients that you want.
7. Provide requisite information for other fields.
8. To send the agreement for signature, click **Send for Signature**.
   -or-
   To save the agreement, click **Save Agreement**.

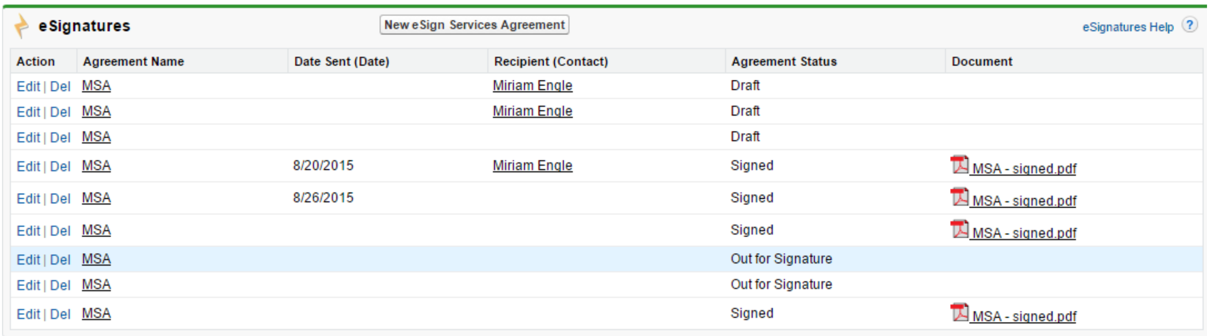
How do I check the status of the document?

To check the status of the document that is send for signature, you must have configured the eSignature related list.

To check the status of the document,

1. Click the **Agreements** tab.
2. Select the agreement that you want to view the agreement status for.
3. Scroll down to **eSignatures** related list.

4. You can view the status of the agreement under **Agreement Status** column.



eSignatures | New eSign Services Agreement | eSignatures Help

Action	Agreement Name	Date Sent (Date)	Recipient (Contact)	Agreement Status	Document
Edit | Del	MSA		Miriam Engle	Draft	
Edit | Del	MSA		Miriam Engle	Draft	
Edit | Del	MSA			Draft	
Edit | Del	MSA	8/20/2015	Miriam Engle	Signed	MSA - signed.pdf
Edit | Del	MSA	8/26/2015		Signed	MSA - signed.pdf
Edit | Del	MSA			Signed	MSA - signed.pdf
Edit | Del	MSA			Out for Signature	
Edit | Del	MSA			Out for Signature	
Edit | Del	MSA			Signed	MSA - signed.pdf

How do I merge data from Salesforce into my Document Cloud agreements before sending for signature?

You can merge data from Salesforce into your Document Cloud agreements using Merge Mappings.

For more information on Merge Mappings, refer to Configuring Mappings.

How do I push data from signed Document Cloud agreements back to Salesforce?

You can push data from signed Document Cloud agreements back to Salesforce using Data Mappings.

For more information on Data Mappings, refer to Configuring Mappings.

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