Apttus Adobe Sign Services on Salesforce Summer 2019 Integration Guide

Doc Rev A

10/14/2019

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About this Guide

The Apttus Adobe Sign Integration guide 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.

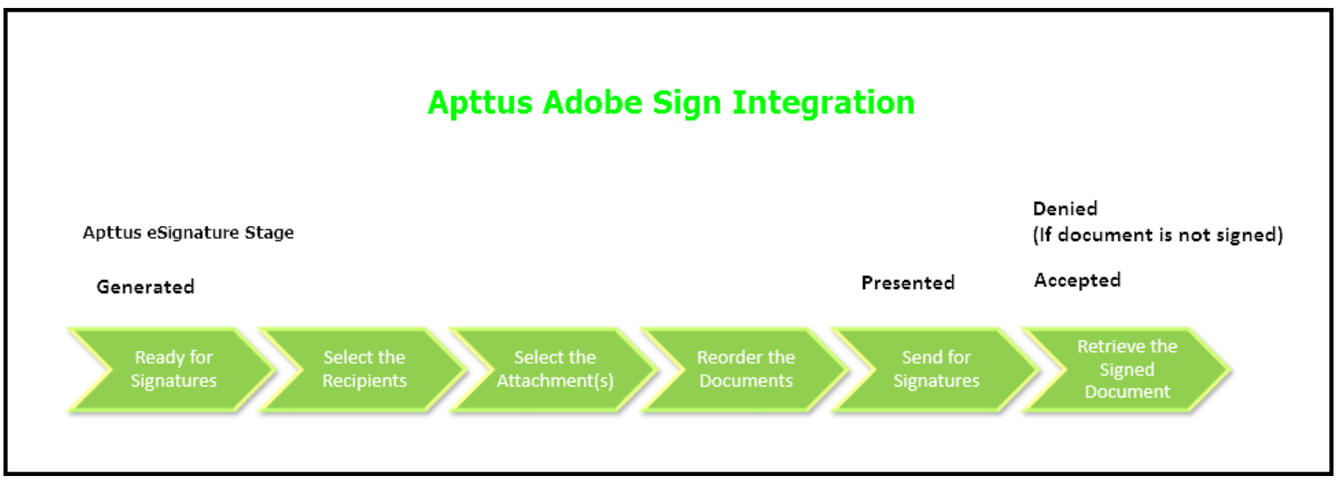
Document	Topic	Description
Summer 2019 Rev A	About Apttus Adobe Sign Services	Updated the topic to conform with Apttus Documentation standards.
Summer 2019	N/A	No new features were added for this release. The guide was updated to reflect product name changes.
Winter 2018	N/A	No new features were added 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.

Installing the Apttus Adobe Sign Packages

> 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.

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 security level. If you know the required settings, select the third option, otherwise, it is recommended you select the second option and refine the security settings as required later.
   - Grant access to admins only
   - Grant access to all users
   - Install for specific users
7. Click **Next** and then click **Install.**

To install Apttus EchoSign Integration packages

For agreements, *Apttus Contract Management package* 8.325 or higher must already be installed.

For quotes, *Apttus Proposal Management package* 8.99 or higher must already be installed

1. Go to the Install Center tab on the Apttus Community Portal.
2. Under My Packages, click the **EchoSign Integration** tab.
3. Select the version that you want to install from the **Version** drop-down menu.
4. Click **Install Now.**

5. Select the environment in which you want to install the packages.
    - Click **Install in Production** to install the packages in your production org.
    - Click **Install in Sandbox** to install the packages in your sandbox org.
6. Enter your Salesforce Credentials and click **Log In.**
7. Enter the **Password** provided by Apttus.
8. Select the **Security Level**. If you know the required settings, select the third option, otherwise, it is recommended you select the second option and refine the security settings as required later.
    - Grant access to admins only
    - Grant access to all users
    - Select security settings
9. Click **Upgrade**. You will receive an email when the installation of packages is successful.

You installed the *Apttus EchoSign Integration packages.*

Similarly, you can install the *Apttus Quote/Proposal EchoSign Integration* packages.

Post-Installation Configuration

After installing the **Apttus Sign Integration** package, you must configure the following eSign Services Admin Settings.

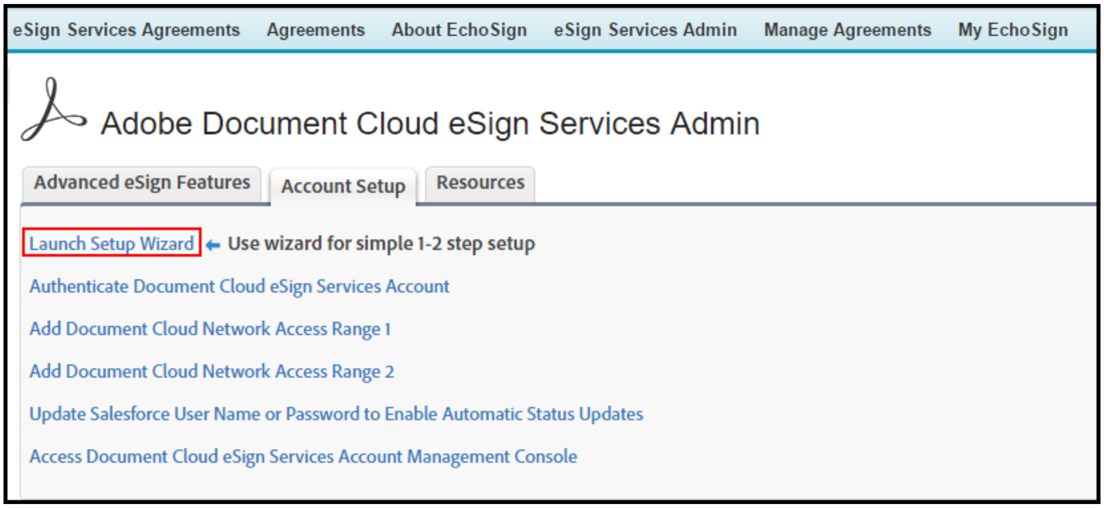
- Configuring eSign Services Admin Settings
  Before you begin to create agreements, it is essential to configure the **eSign Services Admin Settings**.
- Basic Customization
  Customizing basic layout of the page like adding a Send button or adding a related list to the page can be performed.
- System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

Configuring eSign Services Admin Settings

Before you begin to create agreements, it is essential to configure the **eSign Services Admin Settings.**

To configure the eSign Services Admin Settings

1. Click the **eSign Services Admin** tab and then click the **Account Setup** tab.
2. Click **Launch Setup Wizard**.



3. 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.
4. Click **Next**.
5. To enable the trusted IP Range, click **Enable Trusted IP Range 1** and click **Save**.

> **Note**
> You will get an auto-filled IP Address.

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

> **Note**
> You will get an auto-filled IP Address.

7. Click **Next**.
8. Enter your Salesforce credentials.
9. Click **Save**.
10. 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. eSignature button, Notes & Attachments related list are two of the important customizations.

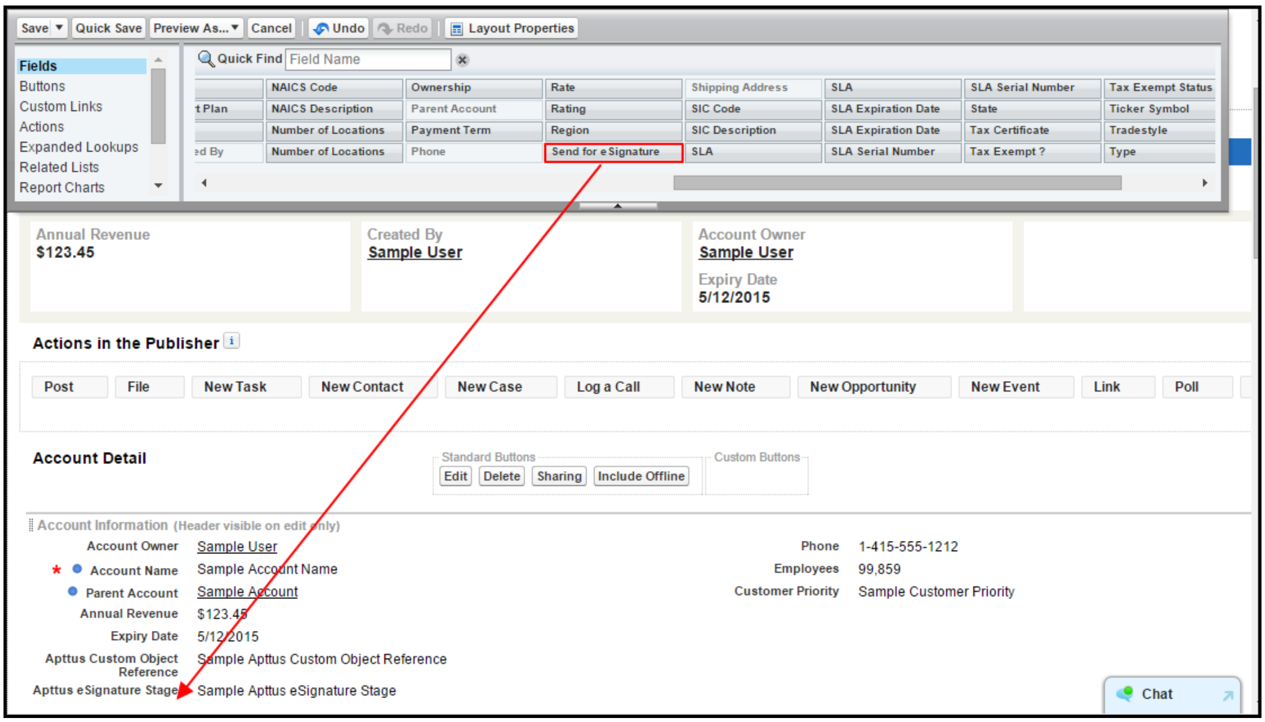
To add send for eSignature button to page layout

1. Click the **eSign Services Admin** tab.

2. 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.

3. Click **Edit** next to the Account Layout you want to customize.
4. Click **Buttons** on the layout editor.
5. Drag and drop **Send for eSignature** to the Custom Buttons section on the page layout below.



6. Click **Save**.

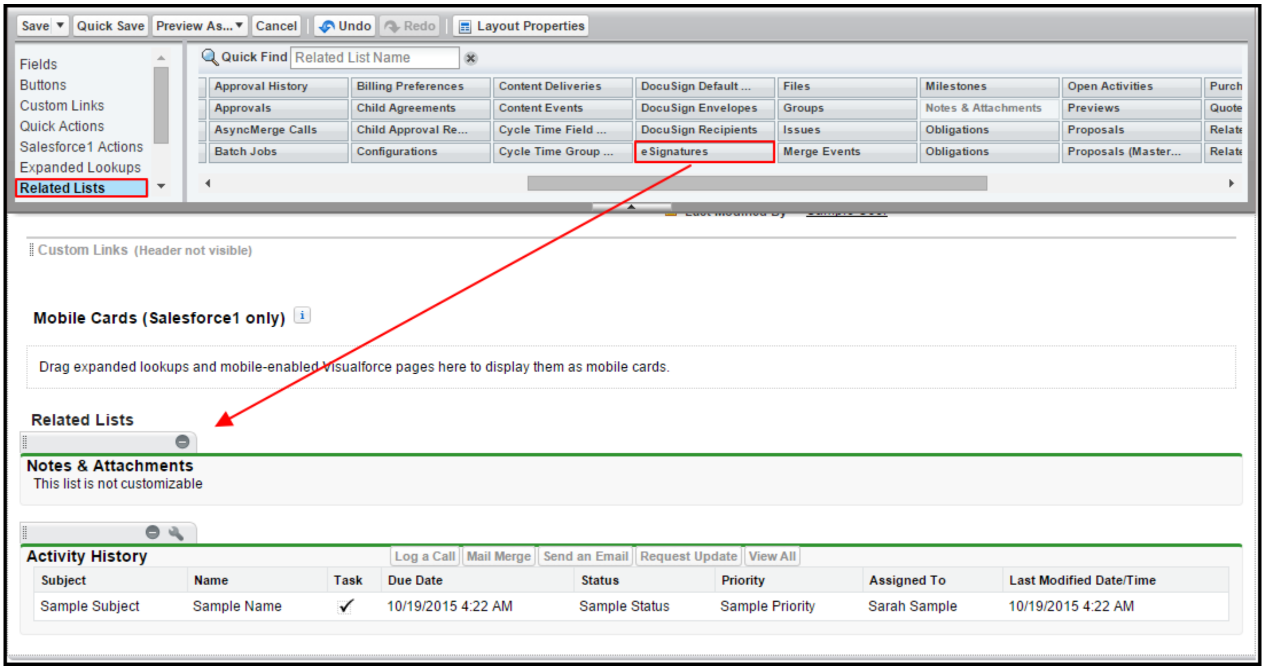
To add a related list to page layout

1. Click the **Agreements** tab. You can perform the same action on Proposals tab as well.

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

2. Select an agreement.
3. On the upper right hand corner, click **Edit Layout**.
4. 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 check box, 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.

Creating Agreement Templates

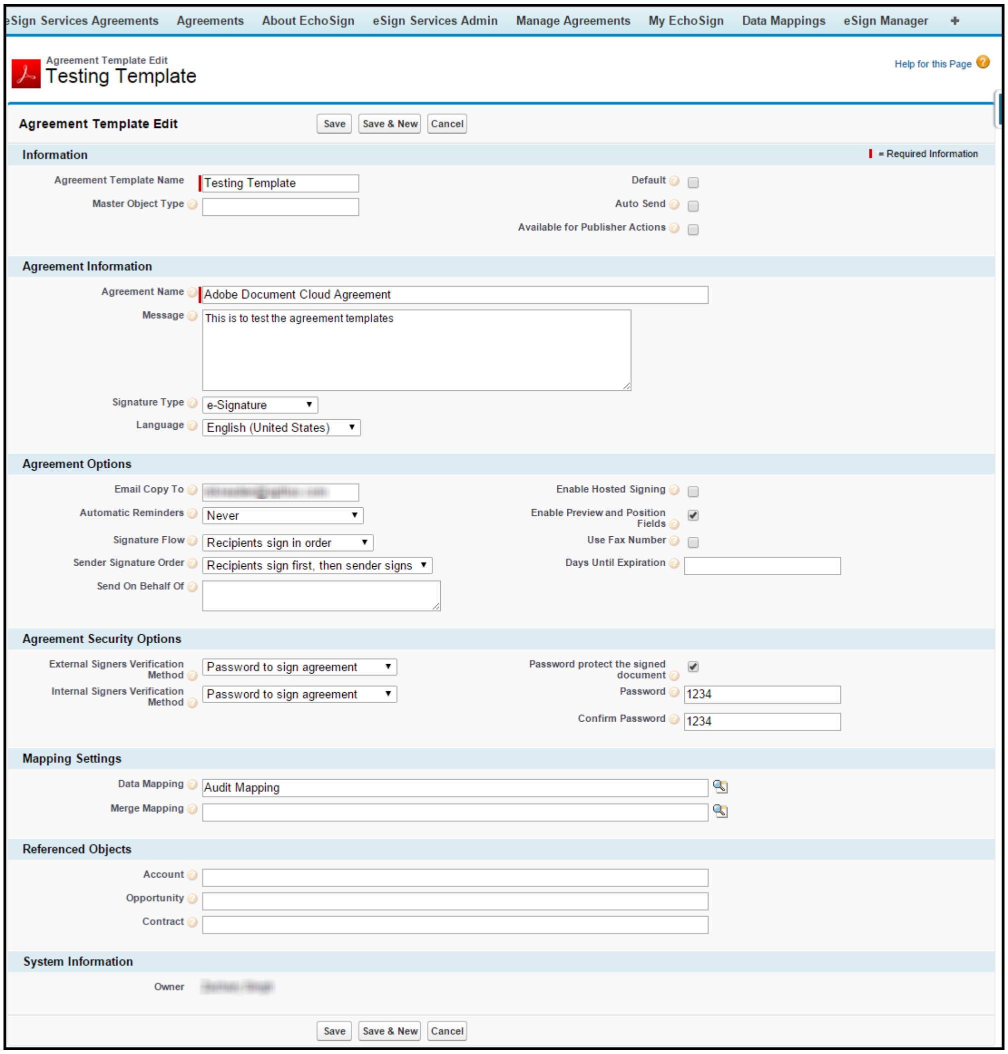
Agreement Templates provide an efficient way of setting up the default values and settings for your agreements. Agreement Templates include pre-defining agreement fields like Agreement Name, Message, Signature Type, Language, various Agreement Options, various Agreement Security options and Mapping Options.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

To create an agreement template

1. Click the **Agreement Templates** tab.
2. Click **New**.
3. Enter the **Agreement Template Name**.
4. Enter the **Agreement Name** and enter the **Message** you want to display in your agreement.
5. Select the **Signature Type** and **Language** for the agreement template.
6. Provide requisite information for the fields pertaining to Apttus Adobe Sign Connector.

Field Name	Description
Master Object Type	Enter the Salesforce Object to be referenced for this Agreement Template(e.g. Lead, Opportunity).
Email Copy To	Enter the email address to send the agreement template to specified email addresses.
Automatic Reminders	Select the reminders to set to remind the signers.
Signature Flow	Select the recipient order.
Sender Signature Order	Enables the sender to sign the agreement based on the option selected (e.g. sender first or sender last)
Send on Behalf Of	Enter the user on behalf of whom you want to send the agreement if its sent automatically; else the agreement will be sent on behalf of current user.
Days Until Expiration	Enter the number of days before the agreement expires.
External Signers Verification Method	Select a verification method to ensure the identity of the external signers, before they can view or sign the document.
Internal Signers Verification Method	Select a verification method to ensure the identity of the internal signers, before they can view or sign the document.
Data Mapping	Enter the data mapping (to fill the data from Document Cloud documents back into Salesforce).

Field Name	Description
Merge Mapping	Enter the merge mapping (to fill the data from Salesforce to Document Cloud documents).
Account	Enter the account ID to be referenced with the agreement.
Opportunity	Enter the opportunity ID to be referenced with the agreement.
Contract	Enter the contract ID to be referenced with the agreement.
Default	Enable if that particular template has to be default template for new agreements.
Auto Send	Enable if you want to automatically send the agreement without displaying the page.
Available for Publsiher Actions	Enable if you want to make your agreement template available to senders via Chatter feeds.
Enable Hosted Signing	Enable hosted in-person signing.
Enable Preview and Position Fields	Enable the signer to preview and positon fields before sending for signatures.
Use Fax Number	Enable to send the agreement to the fax number if available (only for written signature).
Password protect the signed document	Enable the password protection for signed documents. Mention the password below.


eSign Services Agreements
Agreements
About EchoSign
eSign Services Admin
Manage Agreements
My EchoSign
Data Mappings
eSign Manager
Agreement Template Edit
Testing Template
Help for this Page
Agreement Template Edit
Save
Save & New
Cancel
Information
= Required Information
Agreement Template Name
Testing Template
Master Object Type
Default
Auto Send
Available for Publisher Actions
Agreement Information
Agreement Name
Adobe Document Cloud Agreement
Message
This is to test the agreement templates
Signature Type
e-Signature
Language
English (United States)
Agreement Options
Email Copy To
Automatic Reminders
Never
Signature Flow
Recipients sign in order
Sender Signature Order
Recipients sign first, then sender signs
Send On Behalf Of
Enable Hosted Signing
Enable Preview and Position Fields
Use Fax Number
Days Until Expiration
Agreement Security Options
External Signers Verification Method
Password to sign agreement
Internal Signers Verification Method
Password to sign agreement
Password protect the signed document
Password
1234
Confirm Password
1234
Mapping Settings
Data Mapping
Audit Mapping
Merge Mapping
Referenced Objects
Account
Opportunity
Contract
System Information
Owner
Save
Save & New
Cancel

7. 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

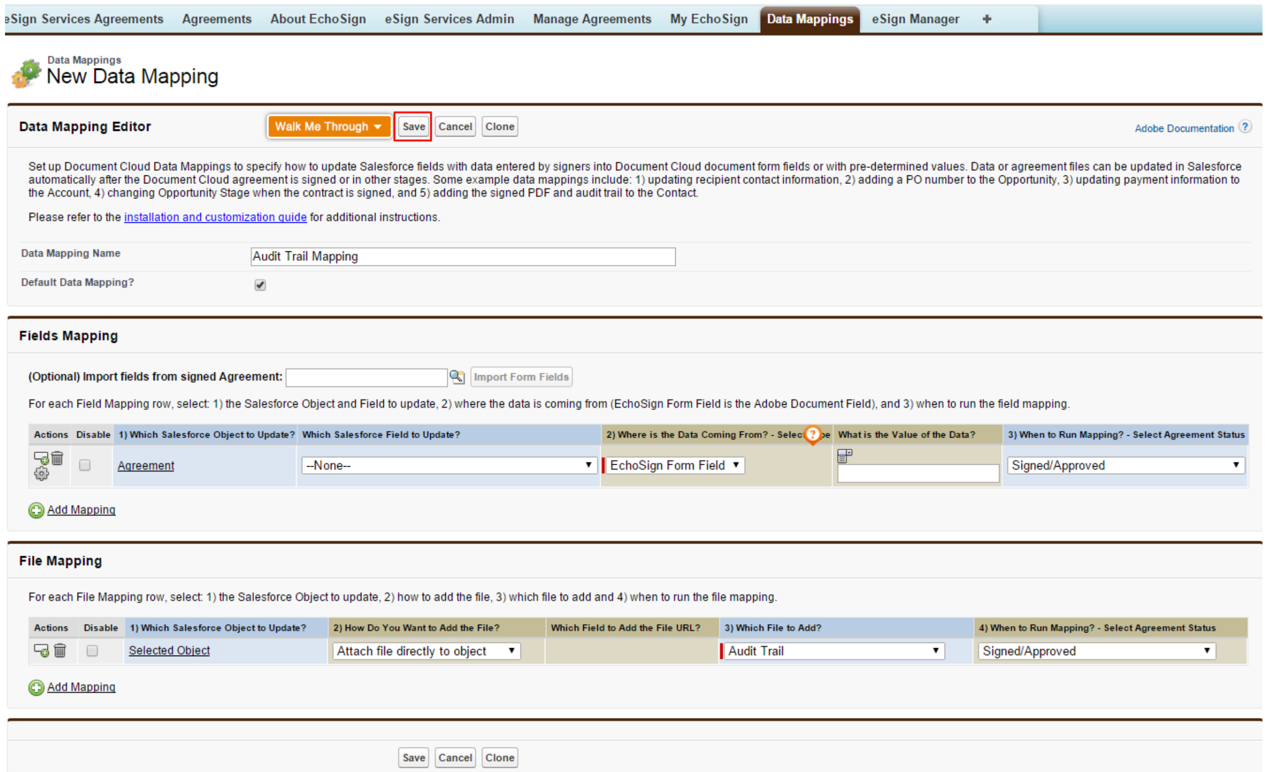
1. Disable Audit Trail setting
2. Set up File Mapping for audit trail
3. Send for Signature

To disable audit trail setting

1. Go to **Setup > Develop > Custom Settings**.
2. Click **Manage** for Document Cloud Settings.
3. Deselect **Add Audit PDF to Attachment List** check box.
4. Click **Save**.

To set up file mapping for audit trail

1. Click the **Data Mappings** tab.
   -or-
   Click ➕ and click **Data Mappings**.
2. Click New.
3. Enter the **Data Mapping Name**.
4. Select **Default Data Mapping** check box.
5. Under the **Fields Mapping** section, click **Add Mapping**.
6. Click **Selected Object** link and select **Apttus Agreement** from the picklist menu.
7. Click **Select**.
8. Under the File Mapping section, click **Add Mapping**.
9. From **Which File to Add?** picklist menu, select **Audit Trail**.
10. 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.

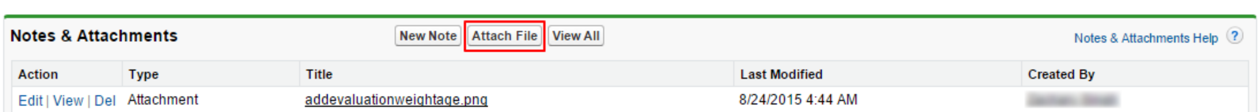
You can add an attachment in one of the following ways.

- 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**.

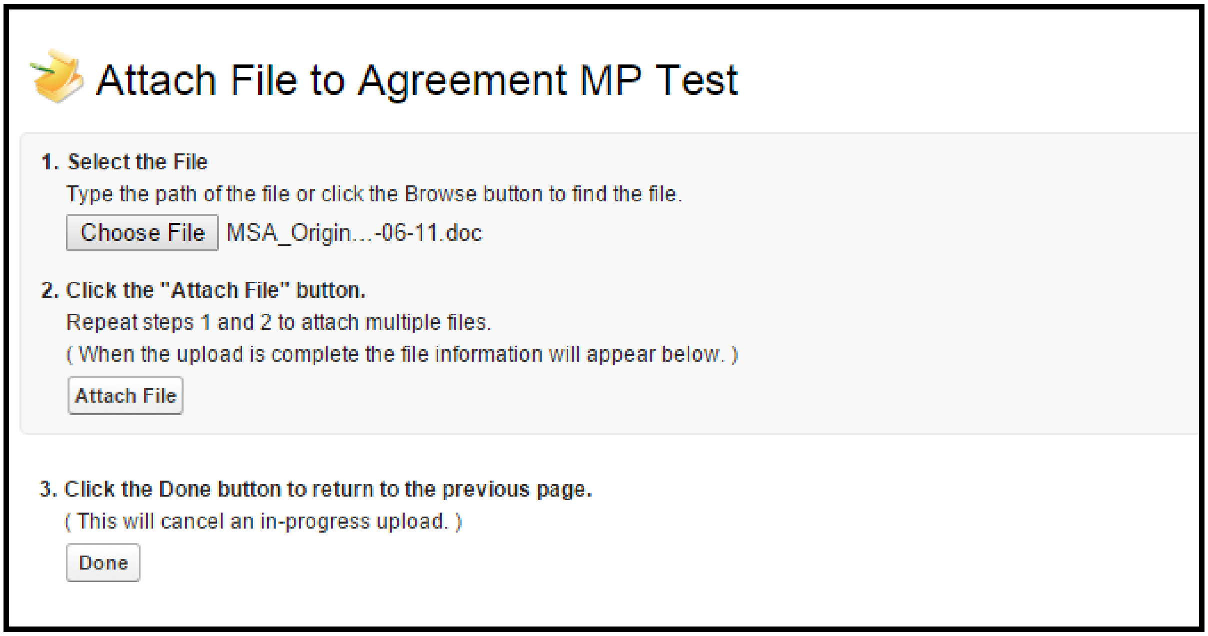


3. Click **Choose File** and select the agreement that you want to upload.

> **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**.



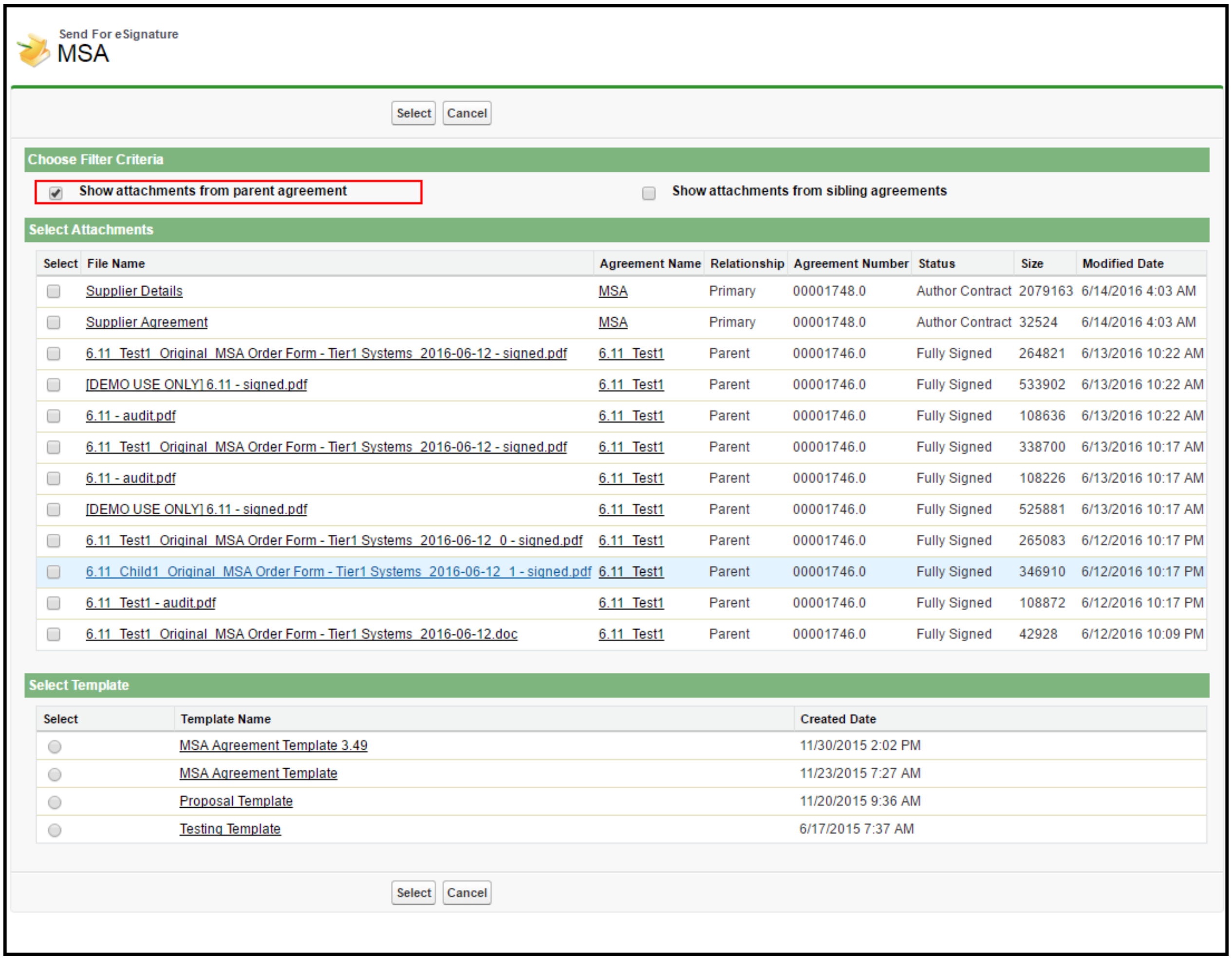
Selecting Attachments and Templates

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.

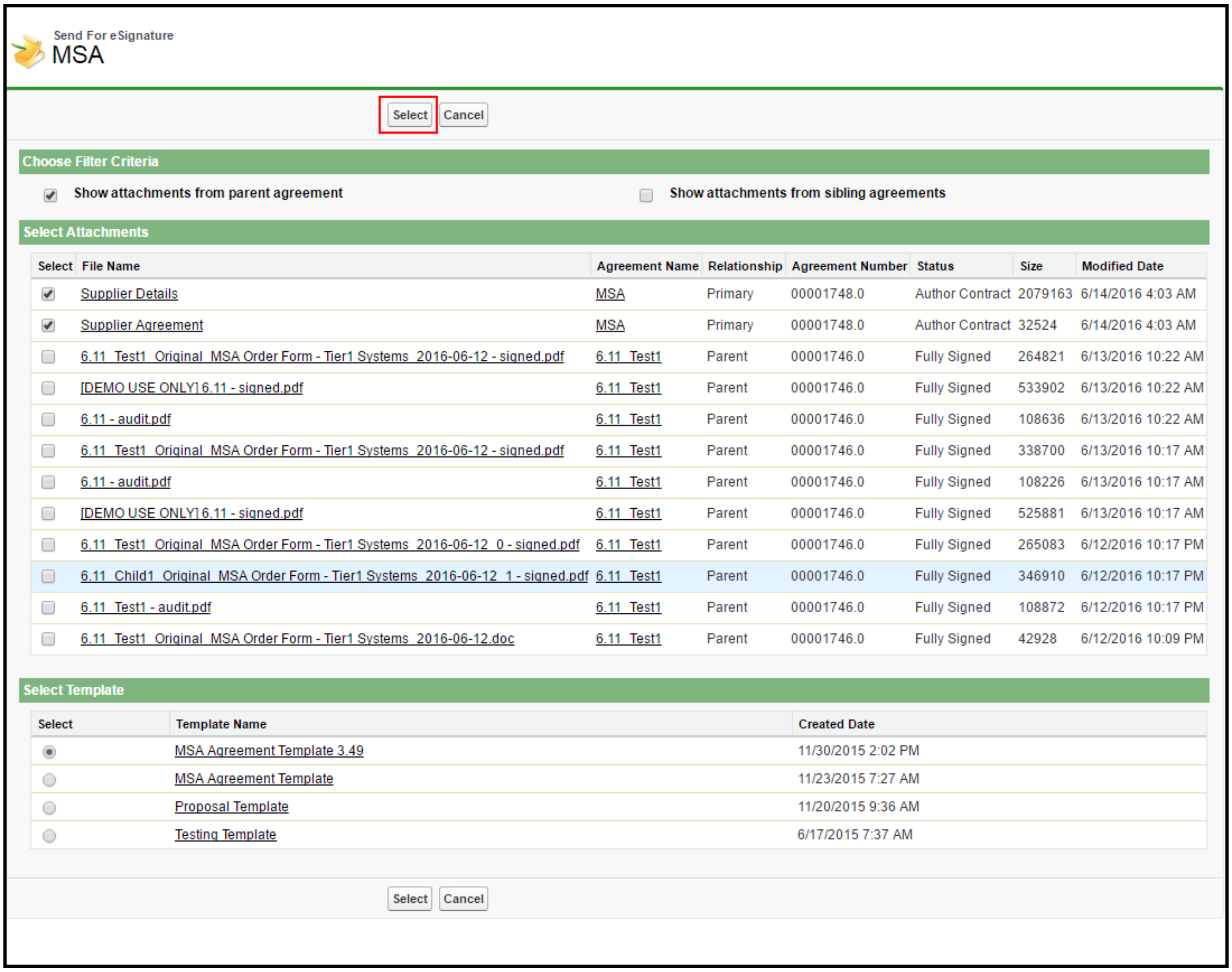
To select attachment and template

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.



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 behaviour 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
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 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 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 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.

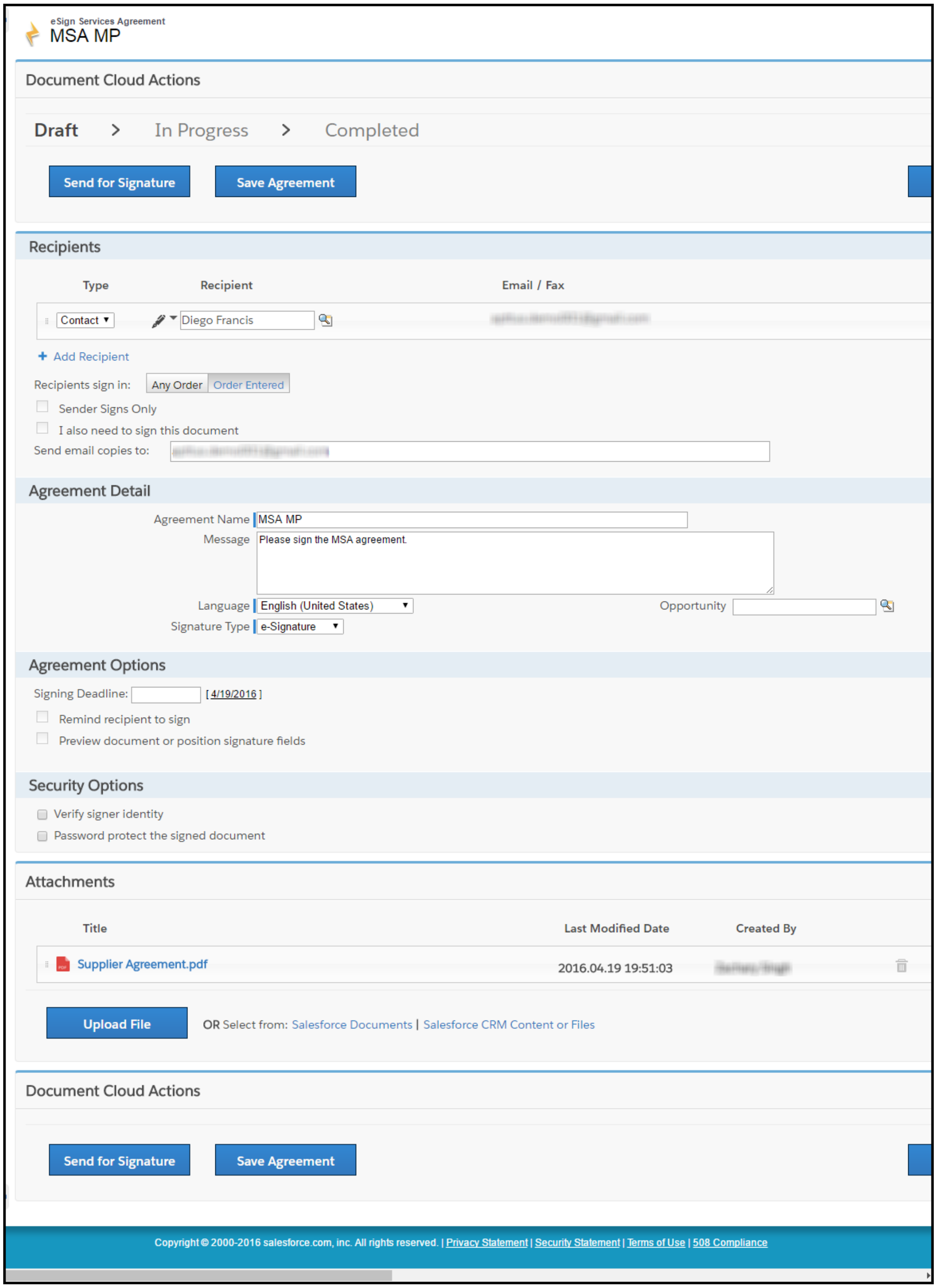
Hide Related Agreement Selection checked?	Don't Copy Signed Documents checked?	Update Related Agreements checked?	Result
Yes	Yes	Yes	The user will be able to select documents from both primary and related/parent/sibling/child agreements. After the document(s) are signed, the signed agreements are copied to Apttus' Agreements record and the Agreement Status is updated in both primary and related/parent/sibling/child agreements.
Yes	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 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 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.

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 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.

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.


eSign Services Agreement
MSA MP
Document Cloud Actions
Draft
In Progress
Completed
Send for Signature
Save Agreement
Recipients
Type
Recipient
Email / Fax
Contact
Diego Francis
Add Recipient
Recipients sign in:
Any Order
Order Entered
Sender Signs Only
I also need to sign this document
Send email copies to:
Agreement Detail
Agreement Name
MSA MP
Message
Please sign the MSA agreement.
Language
English (United States)
Opportunity
Signature Type
e-Signature
Agreement Options
Signing Deadline:
[4/19/2016]
Remind recipient to sign
Preview document or position signature fields
Security Options
Verify signer identity
Password protect the signed document
Attachments
Title
Last Modified Date
Created By
Supplier Agreement.pdf
2016.04.19 19:51:03
Upload File
OR Select from: Salesforce Documents | Salesforce CRM Content or Files
Document Cloud Actions
Send for Signature
Save Agreement
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To manage Adobe Sign actions

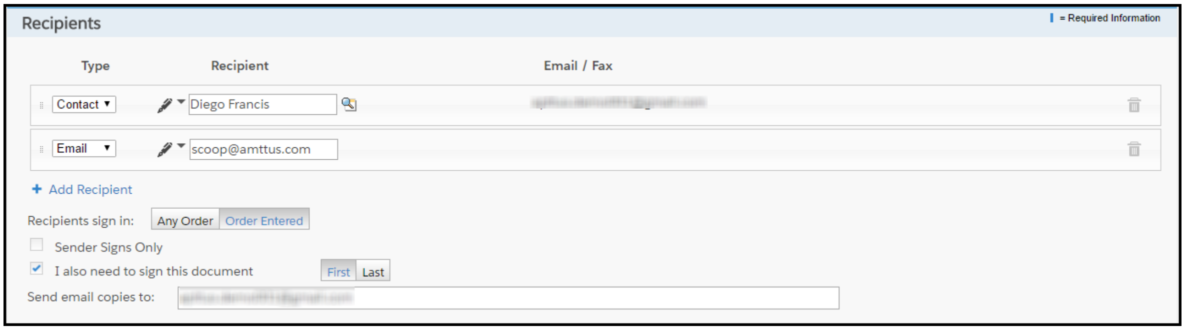
1. Under the Recipients section, select the **Recipient Type**. The available options are.

Option	Description
Contact	Select this option if you want to select an existing Contact as a recipient.
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 **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.
   a. Drag and drop the recipient to change the signing order.
   b. For Recipients Sign in a field, select any of the following options.

Option	Description
Any Order	Select this option if you want to allow the recipients sign the document in any order.
Order Entered	Select this option if you want to allow the recipients sign the document in the order mentioned above.

   c. Select the **Sender Signs Only** check box if you want only your recipient to sign the document.
   d. Select the **I also need to sign this document** check box 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.
   e. Enter the email address of the recipients in the **Send email copies to** check box 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 the **Language**.
7. Select the **Signature Type**. The available options are.

Option	Description
eSignature	Select this option if you want an eSignature of your recipient(s).
Fax Signature	Select this option if you want a fax signature of your recipient(s).

8. For Opportunity text box, 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 check box 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.

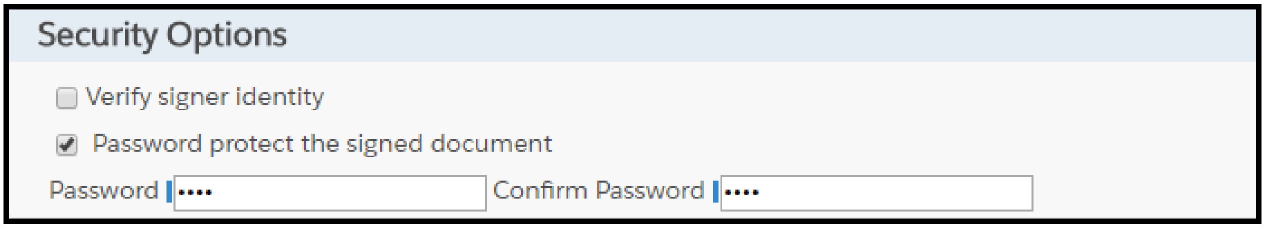
Option	Description
Every Week, Until Signed	Select this option if you want to send a reminder to your recipient to sign the document, every week.

11. Select the **Preview document or position signature fields** check box of 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** check box 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.	
Social	Select the social media account that you wish to use for web-based authentication.

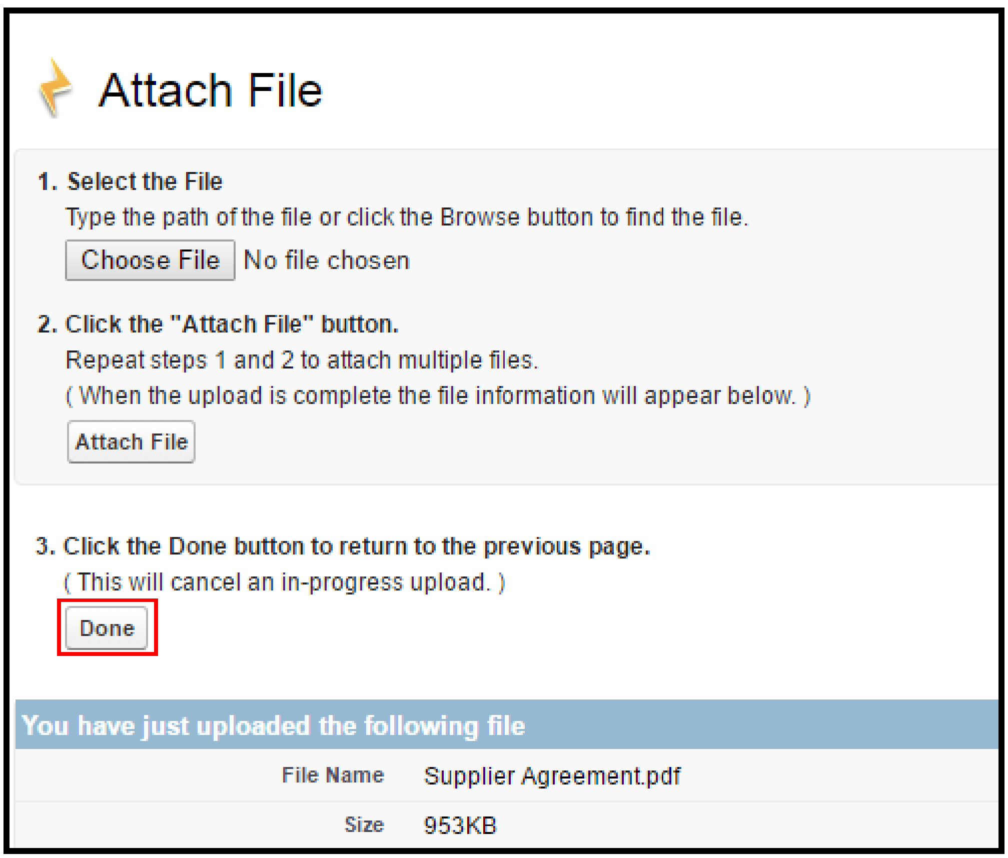
13. Select the **Password Protect the signed document** check box to force users to enter the password before they open the document that you have sent. You must enter the password in **Password** text box.



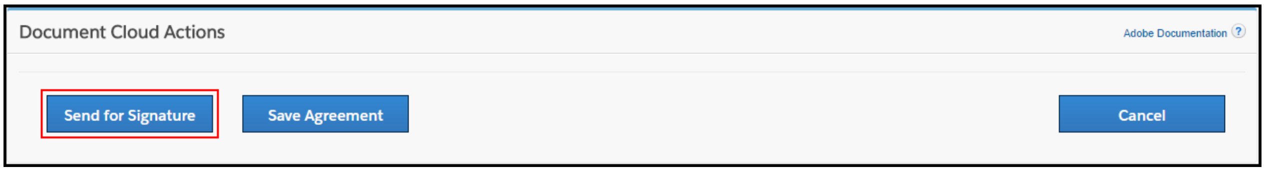
14. If you want to add more documents to the existing attachments, for eSignature, click **Upload File** and upload the document that you want to send.

> ⓘ **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.

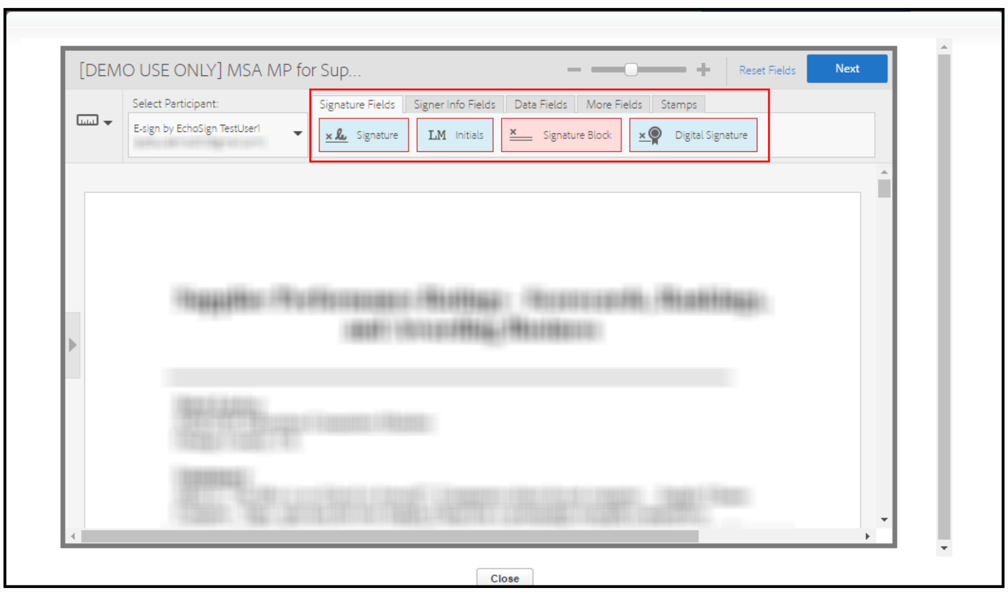
15. Click **Choose File** and choose the document that you want to upload.
16. Click **Attach File.**
17. Click **Done.**



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 agreements screen.



Note
If **Preview document or position signature fields** check box 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 **eSign Services Admin Settings** tab.

For more information on setting up a user, refer to Configuring eSign Services 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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