



# **Apttus Adobe Sign Services on Salesforce**

## **Summer 2020 Administrator Guide**



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## About this Guide

With the Apttus Adobe Sign Services Administrator Guide, you can find out how Adobe Sign for Apttus Adapter works and how to manage your organization's and your customers' eSignature workflows.

Topic	Description
What's Covered	Apttus Adobe Sign Services Administrator Guide is designed to provide administrators with information on configuring and setting up Adobe Sign for Apttus.
Primary Audience	Apttus Administrator, Contract Manager, Adobe Sign Administrator
IT Environment	Refer to the latest <a href="#">Apttus Adobe Sign Services Release Notes</a> for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, refer to <a href="#">What's New</a> topic.
Other Resources	<ul style="list-style-type: none"> <li>• Contract Management User Guide: Refer to this guide to set-up the entire contract management process.</li> <li>• Apttus Adobe Sign Services User Guide: Refer to this guide to set-up the entire Adobe Sign process.</li> <li>• X-Author User Guide: Refer to this guide for detailed instructions on setting up templates and editing agreement documents.</li> </ul>

This guide describes the following tasks:

- Installing Apttus Adobe Sign Services
- Creating Agreement Templates
- Adding the Audit Trail
- Configuring Mappings

Before using Apttus Adobe Sign Services, you must be familiar with the following:

- Basic Salesforce administration
- Salesforce and Apttus terms and definitions
- Apttus Contract Management administration

If you are new to Adobe Sign for Apttus, begin here: [About Apttus Adobe Sign Services](#).

## What's New

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

Document	Topic	Description
Summer 2020 Rev A	<a href="#">Upgrading Apttus Adobe Sign Services</a>	Modified topic.
Summer 2020	<a href="#">Upgrading Apttus Adobe Sign Services</a>	Modified topic. Updated as per the latest release.
	<a href="#">Installing Apttus Adobe Sign Packages</a>	Modified topic. Updated the topic with information about the <b>Apttus Base Library</b> package.
	<a href="#">Running the Migration Script</a>	New topic.
Spring 2020 Rev A	<a href="#">Installing Apttus Adobe Sign Packages</a>	Modified topic. Updated the topic for language and style changes.
	<a href="#">Post-Installation Configuration</a>	Modified topic. eSign Services Admin Settings is renamed to Adobe Sign Admin Settings.
	<a href="#">Configuring Adobe Sign Admin Settings</a>	Modified topic. eSign Services Admin Settings is renamed to Adobe Sign Admin Settings.
	<a href="#">Basic Customization</a>	Modified topic. <ul style="list-style-type: none"> <li>eSign Services Admin Settings is renamed to Adobe Sign Admin Settings.</li> <li>Updated the screenshot</li> </ul>
	<a href="#">Creating Agreement Templates</a>	Modified topic. Updated the topic to include the UI changes.
	<a href="#">Adding the Audit Trail</a>	Modified topic. Updated the steps to disable audit trail setting.
Spring 2020	<a href="#">Upgrading Apttus Adobe Sign Services</a>	New topic. Contains information about upgrading from the previous two releases to the current release.

Document	Topic	Description
	<a href="#">System Properties</a>	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.
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.

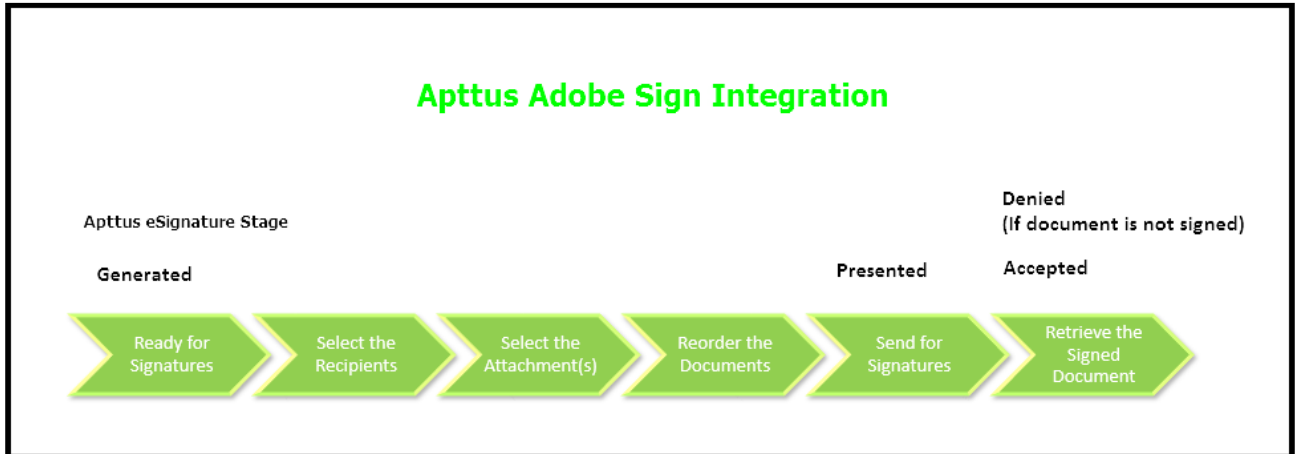
## About Apttus Adobe Sign Services

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.

## 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 the 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 the 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 the 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.

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




# Setting Up 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 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.

 The Apttus Base Library provides a shared library of reusable components that other Apttus packages may use. All CPQ and Contract Management customers must install this package in order to use Apttus CPQ and Contract Management products.


In addition, beginning in the Spring '20 release, Apttus 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 select the **Yes, grant access to these third-party web sites** check box and click **Continue**. For more information, see [Apttus Adobe Sign Services on Salesforce Summer 2020 Release Notes](#).

Order	Package	Install Center tab to access the package	Required ?
1	Apttus Base Library	Contract Management	Y
2	Apttus Contract Management	Contract Management	Y
3	Apttus Proposal Management	CPQ	Y
4	Adobe Sign	NA	Y
5	Apttus Contract EchoSign Integration	Echosign Integration	Y
6	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](https://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.
- [Running the Migration Script](#)  
If you are upgrading to the current release, you must run a post-install script.

## 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.

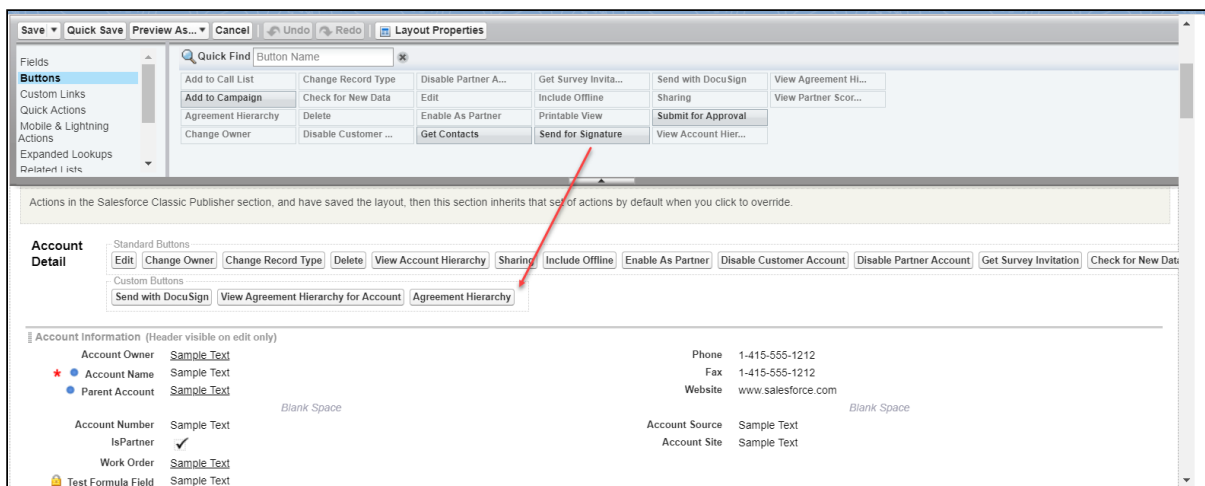
### To add Send for Signature button to page layout

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**.

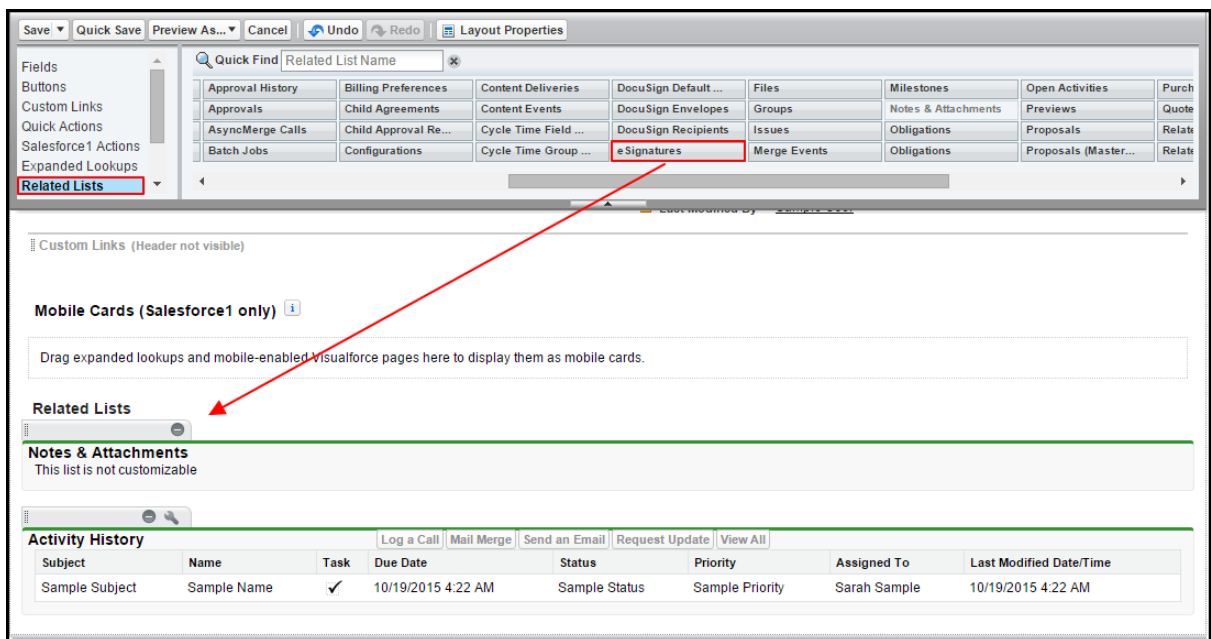
## To add a related list to page layout

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** checkbox 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
<b>Force Selections</b>	<p>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.</p> <p>If checked, the system throws an error if the user does not select attachment(s) and a template, when available.</p> <p>If unchecked, the system does not throw any error, even if the user does not select the template, when available.</p>
<b>Don't Copy Signed Documents</b> (For Contract Management and Quote/Proposal connector)	<p>Select this option if you do not want the system to copy your signed documents from Adobe to Apttus' Agreement or Quote/Proposal record.</p> <p>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.</p> <p>If unchecked, the system will copy your signed documents from Adobe to Apttus' Agreement or Quote/Proposal record.</p>

Setup > Build > Develop > Custom Settings > Apttus-Adobe eSignature Properties > System Properties	
Name	Description
<b>Hide Related Agreement Selection</b> (For Contract Management)	<p>Select this option if you want to hide the option for Related Agreement Selection.</p> <p>If checked, the users will not see the Related/Child/Parent/Sibling agreements on the Select Attachment user interface.</p> <p>If unchecked, the users will see the Related/Child/Parent/Sibling Agreements on the Select Attachment user interface.</p>
<b>Update Related Agreements</b> (For Contract Management)	<p>Select this checkbox if you want to update the Agreement Status of all Related Agreements.</p> <p>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.</p> <p>If unchecked, the status of only the Primary Agreement will be updated and signed documents will be returned back to the Primary Agreement only.</p> <p><b>Note:</b> If you select Update Related Agreements checkbox, you must select Don't Copy Signed Documents checkbox to avoid redundant documents through product trigger.</p> <p>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 <a href="#">Selecting Attachments and Templates</a>.</p>



Setup > Build > Develop > Custom Settings > Apttus-Adobe eSignature Properties > System Properties

Name	Description
Bypass Sharing	<p>Select this checkbox to bypass the Org Sharing Settings set for <b>Agreement Template</b> object.</p> <p>If you select this checkbox, all the agreement templates are made available to the logged-in user to select while sending an agreement for eSignature.</p> <p>If you do not select this checkbox, the availability of templates is based on the access setting specified in the Org Sharing Settings for <b>Agreement Template</b> object.</p>

## Running the Migration Script


As an existing customer, if you are upgrading to the current release, you must run a post-install script manually through the developer console.

```
List<echosign_dev1__SIGN_Agreement__c> lstAgreements = [SELECT Id,
echosign_dev1__Attachment_ID_Order2__c,
echosign_dev1__Attachment_ID_Order__c
FROM
echosign_dev1__SIGN_Agreement__c
WHERE
echosign_dev1__Status__c != 'Signed'];

if(!lstAgreements.isEmpty()) {
    for(echosign_dev1__SIGN_Agreement__c agmt : lstAgreements) {
        agmt.echosign_dev1__Attachment_ID_Order2__c =
agmt.echosign_dev1__Attachment_ID_Order__c;
    }
    update lstAgreements;
}
```

## 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 Summer 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 Summer 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

 Prior to Summer '20 release, signed documents were saved in the Notes & Attachments related list even if the Document Versioning was enabled. After you upgrade to Summer '20 release, signed documents are saved as a major version under Document Versions related list.

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 Summer 2020

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

 If you are upgrading the Apttus Contract EchoSign Integration package to the latest version, you must first upgrade the Apttus Contract Management and Adobe Sign packages to the latest version.

## Upgrading Apttus Adobe Sign Services from Spring 2020 to Summer 2020

1. Go to **Setup > Installed Packages** and ensure that your current Salesforce org has the following Spring 2020 packages installed.

Product	Package Version (Name   Number)
Apttus Base Library	1.0.38   1.38
Apttus Contract Management	11.0.0519   11.519
Apttus Proposal Management	9.2.0206   9.206
Adobe Sign	21.5
Apttus Contract EchoSign Integration	8.0.0034   8.34
Apttus Quote/Proposal EchoSign Integration	1.0.12   1.12

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

Product	Package Version (Name   Number)
Apttus Base Library	11.1.93   1.93
Apttus Contract Management	11.1.0547   11.547
Apttus Proposal Management	10.1.0221   10.221
Adobe Sign	22.11
Apttus Contract EchoSign Integration	8.1.0044   8.44
Apttus Quote/Proposal EchoSign Integration	2.0.0014   2.14

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 Apttus Adobe Sign Services Packages](#).

## Upgrading Apttus Adobe Sign Services from Winter 2019 to Summer 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 Summer 2020. These packages are required to utilize the new features and enhancements of Summer 2020.

Product	Package Version (Name   Number)
Apttus Base Library	11.1.93   1.93
Apttus Contract Management	11.1.0547   11.547
Apttus Proposal Management	10.1.0221   10.221
Adobe Sign	22.11
Apttus Contract EchoSign Integration	8.1.0044   8.44
Apttus Quote/Proposal EchoSign Integration	2.0.0014   2.14

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 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
<b>Agreement Name</b>	Enter a name for the agreement or accept the default name. All agreements are initially created with this name.
<b>Salesforce Object</b>	Select the Salesforce Master Object to be referenced for this agreement template (e.g. Account, Opportunity, Agreement).
<b>Mapped Data</b>	<p>Click <b>Map data into agreement fields</b> to define the mapping of fields. Select one of the following <b>Mapping Method</b>:</p> <ul style="list-style-type: none"> <li>• <b>Select from Object</b> - Select this option to map a field of selected Salesforce object to an agreement field.</li> <li>• <b>Input Specific Value</b> - Select this option to map a specific field to an agreement field.</li> </ul> <p>Click <b>Save</b>.</p>

Field Name	Description
Auto Send	<p>Enable this option if you want to automatically send an agreement after you click the <b>Send for Signature</b> button. The preview of the agreement is not displayed.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> For Auto Send to work, you must have at least one recipient and attachment defined in the agreement template.</p> </div>
<b>Advanced Options</b>	
Agreement Type	Select an agreement type.
Language	Select the language of the recipients.
Select the signature type for this agreement	<p>Select the default value for the signature type to be collected:</p> <ul style="list-style-type: none"> <li>• <b>E-Signature</b> - Electronic signatures will be collected by default.</li> <li>• <b>Written Signature</b> - Recipients will be instructed to download the document, physically sign it, scan the signed document, and upload that document to Adobe Sign.</li> </ul>

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	<p>You can search for a document by specific libraries using the Search bar under the radio button options:</p> <ul style="list-style-type: none"> <li>• <b>Salesforce CRM &amp; Files</b> - Your personal library. Any documents you upload from your system are stored in this library for future use.</li> <li>• <b>Salesforce Documents</b> - The Salesforce library that is shared amongst users.</li> <li>• <b>Adobe Sign Library</b> - The library content stored in the Adobe Sign system.</li> </ul>

Field Name	Description
<b>Advanced Options</b>	
<b>Add a document from object or runtime variable</b>	<p>Select a document or object from a Salesforce object or runtime variable.</p> <div data-bbox="611 488 1426 730" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p> 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).</p> </div> <p>There are three options:</p> <ul style="list-style-type: none"> <li>• <b>Add from Salesforce Object</b> <ul style="list-style-type: none"> <li>• <b>Source Type</b> - Choose the object type for the document between File or Attachment.</li> <li>• <b>Document Selection</b> - Select the document to attach based on one of these criteria:               <ul style="list-style-type: none"> <li>• Latest Document</li> <li>• Oldest Document</li> <li>• All Documents</li> </ul> </li> <li>• <b>Document Selection Determined By</b> - Select how the file selection is determined for latest or oldest files.</li> </ul> </li> <li>• <b>Add from Opportunity Quote</b> - Define the following fields, as required.           <ul style="list-style-type: none"> <li>• <b>Quote Type</b> - Select which quote object to use for document selection.</li> <li>• <b>Quote Type Determined By</b> - Select how the quote selection is determined for latest or oldest files.</li> <li>• <b>Quote Document Type</b> - Select which quote document to add from:               <ul style="list-style-type: none"> <li>• Latest Document</li> <li>• Oldest Document</li> <li>• All Documents</li> </ul> </li> </ul> </li> <li>• <b>Runtime Variable</b> - Dynamically add an attachment from an object.           <ul style="list-style-type: none"> <li>• <b>Add a runtime variable name</b> - Specify the variable and ID type from your Salesforce object.</li> </ul> </li> </ul>

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: <ul style="list-style-type: none"> <li>• <b>All Recipients Sign</b> - 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.</li> <li>• <b>Only Sender Signs</b> - Enable this option to add the "Only   Sign" functionality to the template.</li> </ul>
Recipients	Recipients can be added by: <ul style="list-style-type: none"> <li>• <b>Salesforce Object</b></li> <li>• <b>Email</b></li> <li>• <b>Runtime Variable</b></li> </ul>
Message	Enter the message that you want to deliver to the recipients. The Message section imports the <b>Agreement Name</b> from the <b>Template Details</b> tab.
<b>Advanced Options</b>	
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
<b>Automatic Reminders</b>	Select an option for automatic reminders. The options are <i>Never, Every Day, Until Signed; or Every Week, Until Signed.</i>
<b>Days Until Expiration</b>	Enter the number of days until the signature request expires.
<b>Post Sign Redirect URL</b>	Enter a URL to automatically redirect the signers of an agreement to a specified URL after they sign.
<b>Post Sign Redirect Delay</b>	If the <b>Enable Post Sign Options</b> setting is enabled and a <b>Post Sign Redirect URL</b> is specified, enter the number of seconds that should elapse before executing the redirect.
<b>Password protect the signed document</b>	Enable this option to encrypt the signed PDF that is sent to signers.
<b>Set as default template for all agreements</b>	Enable this option if you want to set this as the Default agreement template for your new agreements.
<b>Enabled as a Chatter Publisher Actions</b>	If you have enabled <b>Chatter Publisher Actions</b> 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**.

[Sign Services Agreements](#)
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[About EchoSign](#)
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[My EchoSign](#)
**Data Mappings**
[eSign Manager](#)

### Data Mappings

## New Data Mapping

**Data Mapping Editor** 
[Walk Me Through](#)
[Save](#)
[Cancel](#)
[Clone](#)

Set up Document Cloud Data Mappings to specify how to update Salesforce fields with data entered by signers into Document Cloud document form fields or with pre-determined values. Data or agreement files can be updated in Salesforce automatically after the Document Cloud agreement is signed or in other stages. Some example data mappings include: 1) updating recipient contact information, 2) adding a PO number to the Opportunity, 3) updating payment information to the Account, 4) changing Opportunity Stage when the contract is signed, and 5) adding the signed PDF and audit trail to the Contact.

Please refer to the [installation and customization guide](#) for additional instructions.

Data Mapping Name:

Default Data Mapping?

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### Fields Mapping

(Optional) Import fields from signed Agreement:  [Import Form Fields](#)

For each Field Mapping row, select 1) the Salesforce Object and Field to update, 2) where the data is coming from (EchoSign Form Field is the Adobe Document Field), and 3) when to run the field mapping.

Actions	Disable	1) Which Salesforce Object to Update?	Which Salesforce Field to Update?	2) Where is the Data Coming From? - Select	What is the Value of the Data?	3) When to Run Mapping? - Select Agreement Status
	<input type="checkbox"/>	Agreement	--None--	EchoSign Form Field	<input type="text"/>	Signed/Approved

[Add Mapping](#)

---

### File Mapping

For each File Mapping row, select 1) the Salesforce Object to update, 2) how to add the file, 3) which file to add and 4) when to run the file mapping.

Actions	Disable	1) Which Salesforce Object to Update?	2) How Do You Want to Add the File?	Which Field to Add the File URL?	3) Which File to Add?	4) When to Run Mapping? - Select Agreement Status
	<input type="checkbox"/>	Selected Object	Attach file directly to object		Audit Trail	Signed/Approved

[Add Mapping](#)

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

For more information on sending a document for eSignature, refer *Sending for eSignature* topic in *Apttus Adobe Sign Services on Salesforce User Guide*.

# 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	<a href="https://helpx.adobe.com/content/dam/help/en/sign/Adobe_Sign_Best_Practices_SFDC.PDF">https://helpx.adobe.com/content/dam/help/en/sign/Adobe_Sign_Best_Practices_SFDC.PDF</a>
Data Mappings	<a href="https://helpx.adobe.com/content/dam/help/en/sign/Adobe_Sign_Best_Practices_SFDC.PDF">https://helpx.adobe.com/content/dam/help/en/sign/Adobe_Sign_Best_Practices_SFDC.PDF</a>

## 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 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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DOC ID: ESIGNSFSUM20AGREVA20200908