Apttus Adobe Sign Services on Salesforce

Summer 2020 User Guide

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About this Guide

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

This guide describes the following tasks:

- eSignature Workflow
- Sending Document for eSignature

Before using Apttus Adobe Sign, 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 Apttus Adobe Sign, 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	Adding Attachments	Modified topic. Added a note about upload documents via Files related list.
	Selecting Attachments and Templates	Modified topic. Added content about document versioning support.
Spring 2020 Rev A	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	NA	No new features were added for this release.
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.

Getting Started

This section explains the tasks to be performed to get started with the Apttus Adobe Sign Services.

- Logging into Apttus Adobe Sign Services
- Proposals and Agreements

Logging into Apttus Adobe Sign Services

Log in to your Salesforce org to access Apttus Adobe Sign connector.

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

Prerequisites

- You must install all of the required Apttus Adobe Sign packages.
- You must have login credentials provided by Apttus.

To log into Apttus Adobe Sign connector

1. Go to http://www.salesforce.com.
   Or
   If your organization is using a sandbox or test environment to access Apttus Adobe Sign (for example, if you are doing user acceptance testing), go to http://test.salesforce.com instead.
2. In the toolbar at the top of the page, click **Login**. The login page opens.
3. Enter your User Name and Password, and click **Log in**.

You are successfully logged into Apttus Adobe Sign connector.

Proposals and Agreements

The Apttus Adobe Sign connector works with both Apttus Proposals (CPQ) and Apttus Contract Management (CLM). The connector works in the same way for both of the Apttus products and as a result, this guide is generic in order to allow users of both products to use it.

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.

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

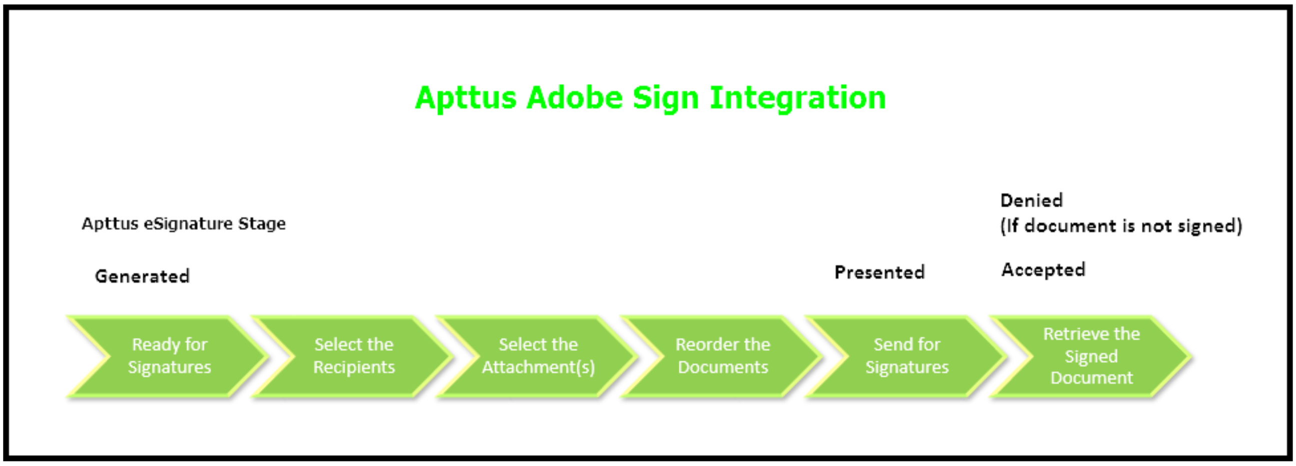
Key Terminology

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.

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.



Sending for eSignature

Agreements or Quote/Proposals can be sent for eSignature using Apttus Adobe Sign. 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.

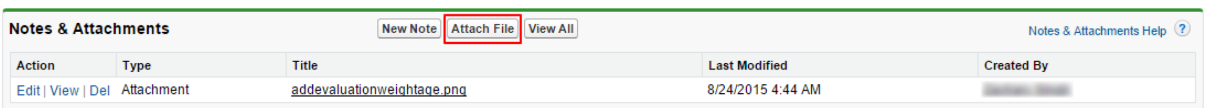
You can add an attachment in one of the following ways.

- 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

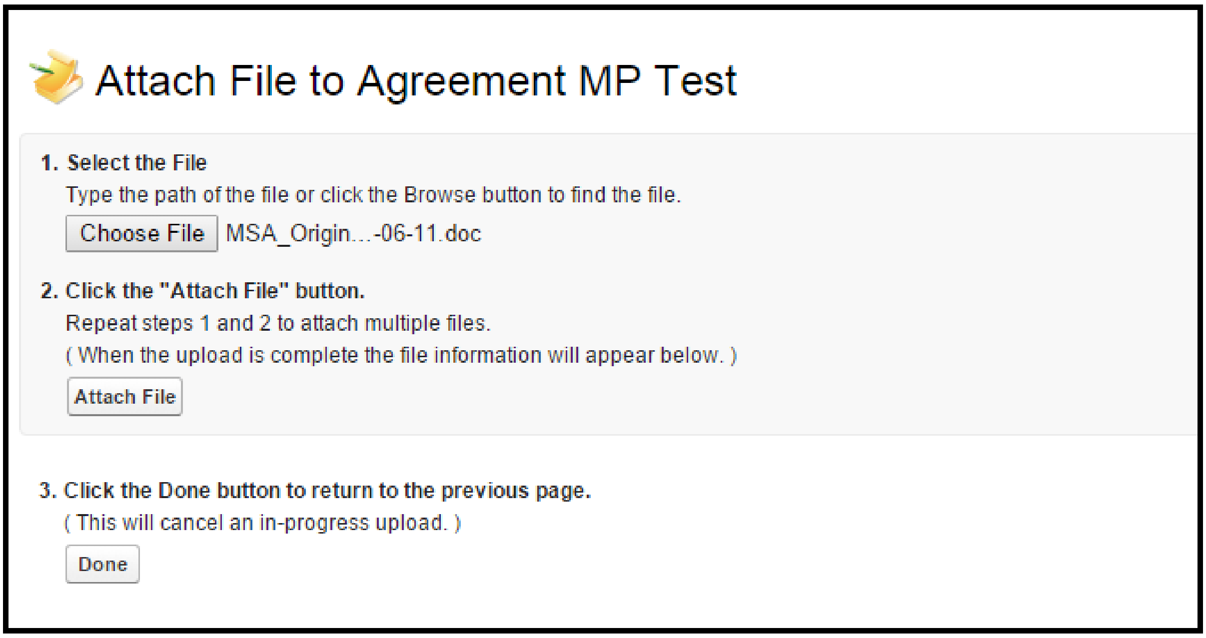
1. Select the agreement that you want to attach the document.
2. Under the **Notes & Attachments** related list, click **Attach File**.



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**.



> You can also attach the documents manually through **Files** related list. The uploaded documents are displayed in both **Files** and **Notes & Attachments** related list.

Selecting Attachments and Templates

After adding the attachments manually to the Notes & Attachments or Files related list, you must click **eSignature** button. After clicking the **eSignature** button, you are redirected to the Attachments and Template selection page. On this page, the documents listed in the **Select Attachments** view are populated from the Files and Notes & Attachments related list.

When Document Versioning is enabled, documents listed in the **Select Attachments** view are populated from the Document Versions, Files, and Notes & Attachments related list. The latest version of the document is included in the list for selection. After the document is electronically signed by one or more recipients, the intermediate or fully signed documents will be updated and saved as a major version under Document Versions related list.

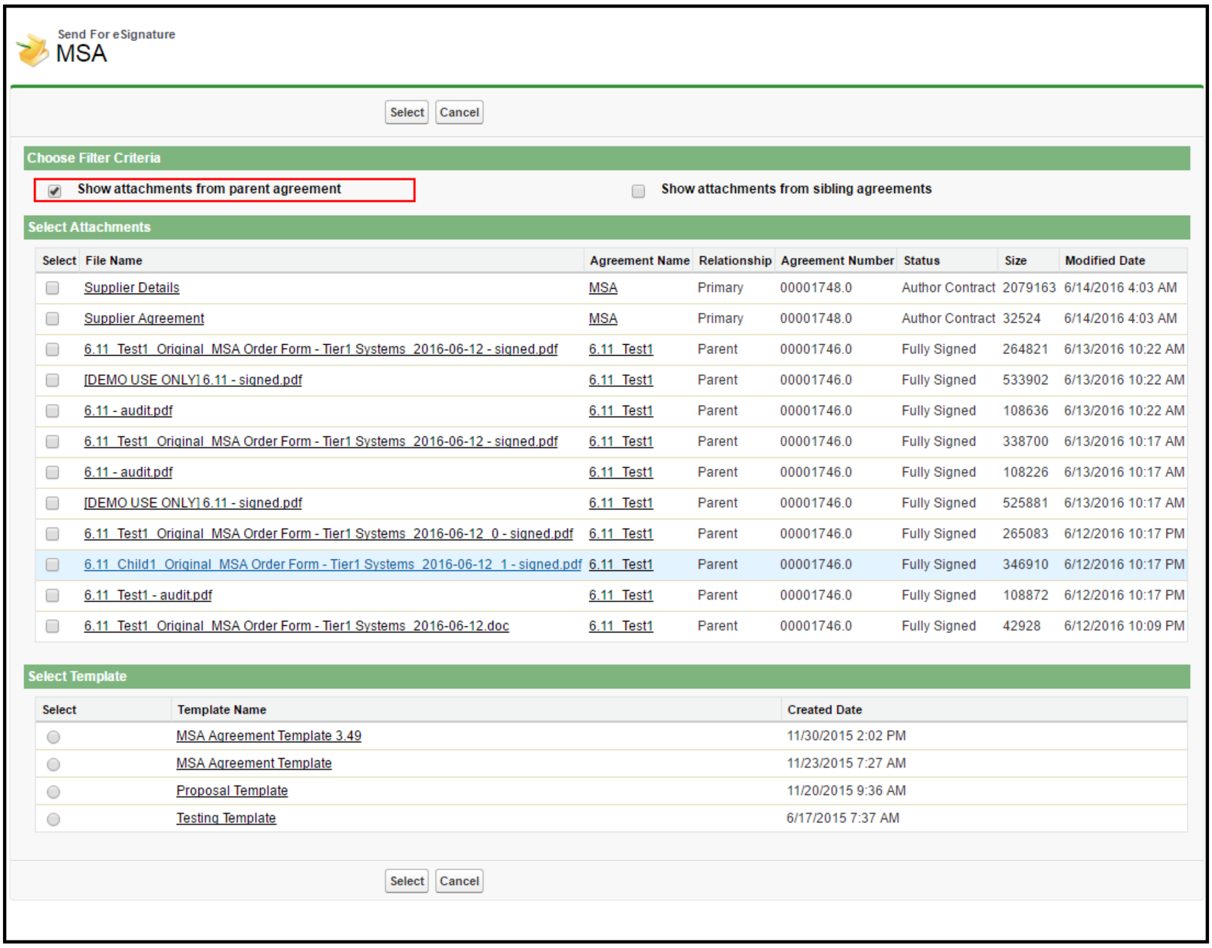
Prior to Summer '20 release, signed documents were saved in the Notes & Attachments related list even if the Document Versioning was enabled.

To select attachment and template

1. Click the **eSignature** button.
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. Under the **Select Attachments** section, select the attachments that you want to send for eSignature. You can select multiple attachments.
4. Under the **Select Templates** section, 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.

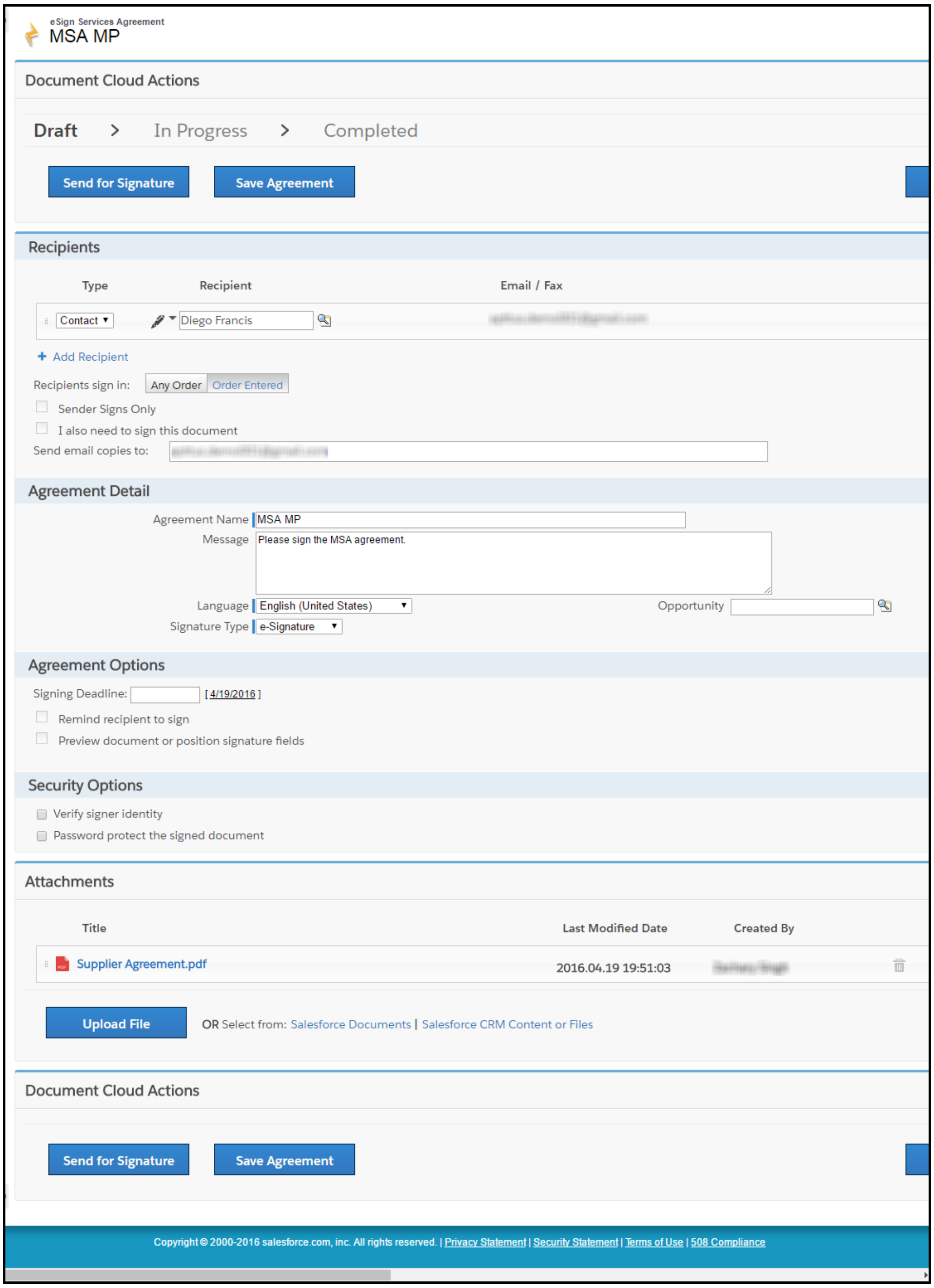
Hide Related Agreement Selection checked?	Don't Copy Signed Documents checked?	Update Related Agreements checked?	Result
No	Yes	Yes	The user will be able to select documents from both primary and related/parent/sibling/child agreements. After the document(s) are signed, the signed agreements are not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

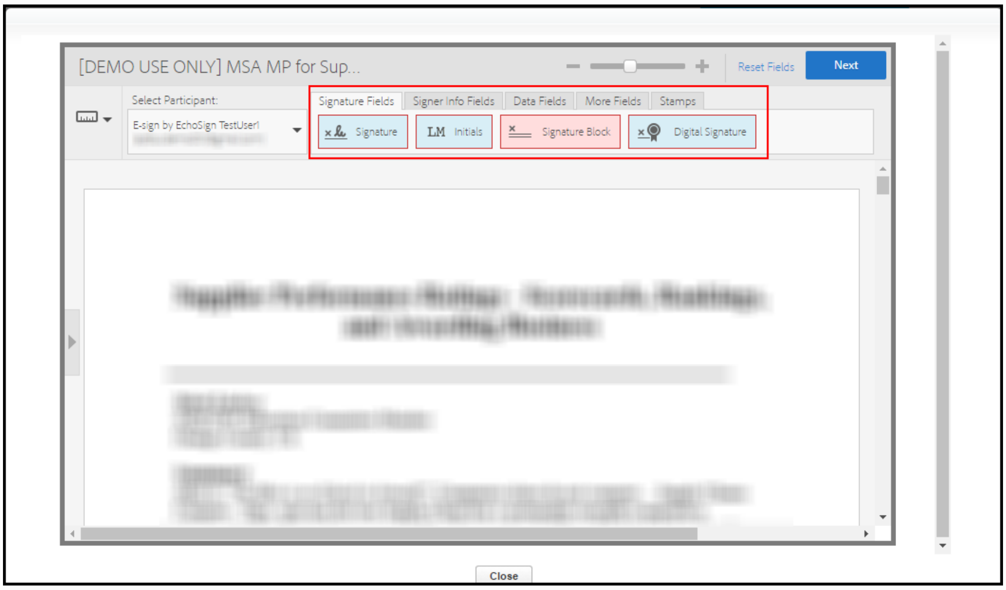
Option	Description
Social	Select the social media account that you wish to use for web-based authentication.

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 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**.

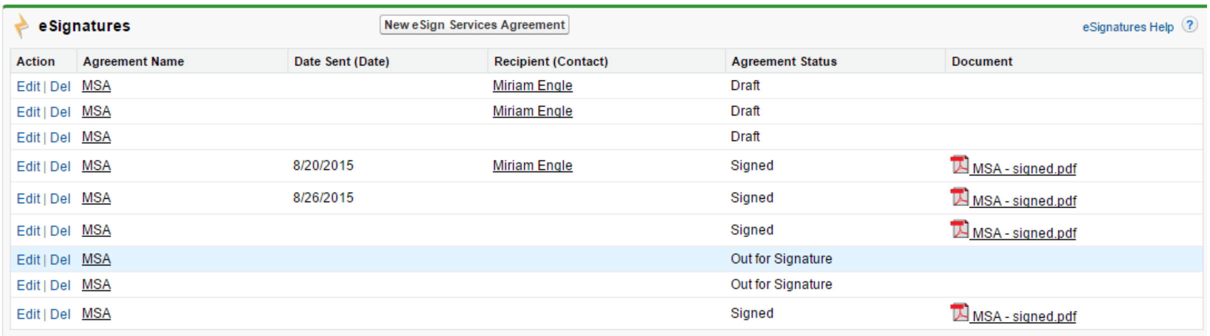
How do I check the status of the document?

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

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For additional resources and support, please visit https://community.conga.com.

DOC ID: ESIGNSFSUM20UG20200804

