



Adobe Sign Services



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Automate and simplify the eSignature process, and send any type of document related to Conga quotes or contracts for eSignature using the Cloud-based Adobe Sign services.

Adobe Sign Services Release Notes

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


- [Winter '20 Release Notes](#)

Winter '20 Release Notes

Release Notes contain the following information about Adobe Sign Services Winter '20 Release.

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


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


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

Packages

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

Product	Latest Certified Version (Name Number)
Adobe Sign	22.11
Conga Base Library (New)	1.2.123 1.123
Conga Contract Lifecycle Management (New)	11.2.0582 11.582
Conga CLM EchoSign Integration (New)	8.2.0049 8.49
Conga Quote EchoSign Integration	2.0.0014 2.14
Conga Quote Management (New)	10.2.0227 10.227


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

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

System Requirements and Supported Platforms

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

System Requirements	
Item	Requirement
Operating System	Standard Salesforce.com requirements. See Salesforce PDF .

System Requirements	
Item	Requirement
Browser	<p>Conga supports the following browsers:</p> <ul style="list-style-type: none"> • Microsoft Edge Chromium • Google Chrome <p>Conga recommends the latest version of the browser for the best performance. Conga also recommends its customers to use Microsoft Edge Chromium as the browser of choice.</p> <div style="border: 1px solid #f9c97d; padding: 5px; margin-top: 10px;"> <p> Internet Explorer is not supported.</p> </div>
Adobe Sign System Requirements	See System Requirements for Adobe .

New Features

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

Enhancements

The following enhancements are new to Adobe Sign Services in this release.

Enhancements to Send For eSignature User Interface

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

Get Started

For details on sending a document for eSignature, refer to [Sending for eSignature in Adobe Sign Services Winter '20 User Guide](#).

Updates to Send For Echosign Custom Button

In this release, the formula field is updated for **Send For Echosign** custom button to support the Lightning user interface. The administrator needs to update the formula field for **Send**

For Echosign custom button to see the Lightning user interface when working in Lightning mode.

Get Started

For details on creating a custom button, refer to [Customizing Action Button](#) in *Adobe Sign Services Winter '20 Administrator Guide*.

Data Model Changes

There are no data model changes in this release.

Resolved Issues

There are no resolved issues in this release.

Known Issues

There are no known issues in this release.

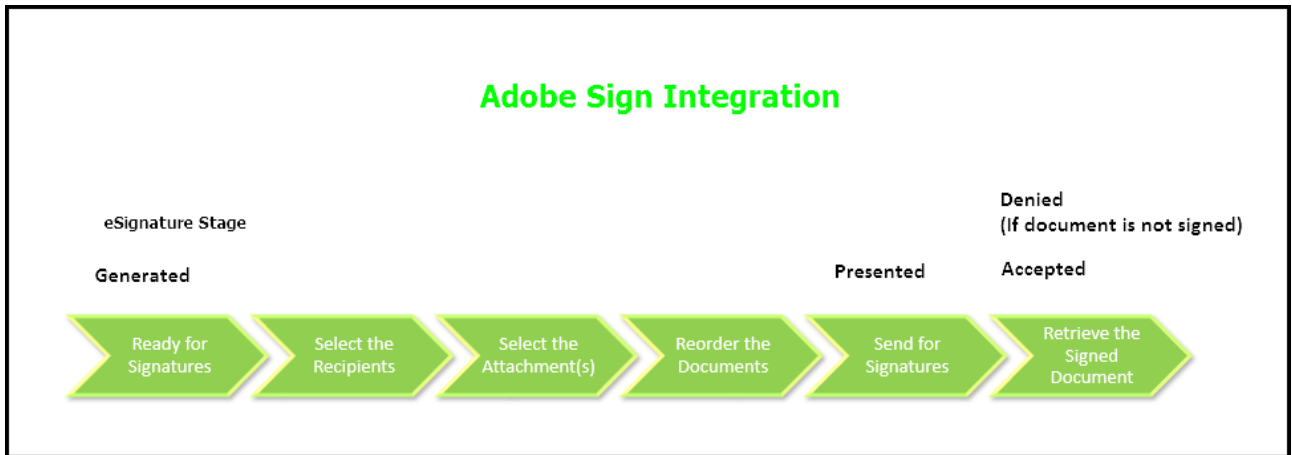
About Adobe Sign Services

Adobe Sign Services enables customers to electronically sign any type of document associated with quotes or contracts. By integrating Conga 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, this Adapter provides a streamlined point-and-click way for users to send attachments for electronic signature. Within the quote or contract, the Send for eSignature feature allows users to dramatically shorten approval cycles by quickly compiling the necessary documents, selecting the right contacts from their Salesforce instance, and easily sending personalized emails. As documents are routed, this Adapter ensures that documents adhere to the appropriate workflows. When legal documents are approved via Adobe Sign, the signature status is automatically updated inside Salesforce, and final signed documents are automatically attached to the quote or contract. With this Adapter, you have a fully secure, auditable, and trackable view of who has approved your documents for quotes or contracts.

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 eSignature Stage/Status field changes according to the activities. The signature stages/statuses are shown in the Adobe Sign Integration Life cycle. The activities that you perform are stored in the Activity History related list.



This guide describes the following tasks:

Administrator Tasks	User Tasks
<ul style="list-style-type: none"> • Installing Adobe Sign Services • Creating Agreement Templates • Adding the Audit Trail • Configuring Mappings 	<ul style="list-style-type: none"> • eSignature Workflow • Sending Document for eSignature

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

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

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

Key Terminology

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

Term	Definition
Agreement	The set of terms and conditions agreed between two or more parties. An 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.

What's New in Adobe Sign Services Documentation

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

Winter '20

Document	Topic	Description
Winter 2020	Customizing Action Button	New topic.
	Upgrading Adobe Sign Services	Modified topic. Updated as per the latest release.
	Selecting Attachments and Templates	Modified topic. Updated screenshots.

Summer '20

Document	Topic	Description
Summer 2020	Upgrading Adobe Sign Services	Modified topic. Updated as per the latest release.
	Installing Adobe Sign Packages	Modified topic. Updated the topic with information about the Apttus Base Library package.
	Running the Migration Script	New topic.
	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 '20

Document	Topic	Description
Spring 2020 Rev A	Installing Adobe Sign Packages	Modified topic. Updated the topic for language and style changes.
	Post-Installation Configuration	Modified topic. eSign Services Admin Settings is renamed to Adobe Sign Admin Settings.
	Configuring Adobe Sign Admin Settings	Modified topic. eSign Services Admin Settings is renamed to Adobe Sign Admin Settings.
	Basic Customization	Modified topic. <ul style="list-style-type: none"> eSign Services Admin Settings is renamed to Adobe Sign Admin Settings. Updated the screenshot
	Creating Agreement Templates	Modified topic. Updated the topic to include the UI changes.
	Adding the Audit Trail	Modified topic. Updated the steps to disable audit trail setting.
	Selecting Attachments and Templates	Modified topic. Updated the Custom Settings table.
	Managing Adobe Sign Actions	Modified topic. Updated the topic for language and style changes.
Spring 2020	Upgrading Adobe Sign Services	New topic. Contains information about upgrading from the previous two releases to the current release.
	System Properties	Modified topic. Updated the topic to include the system property, Bypass Sharing.

Adobe Sign Services for Administrators

Select one of the following topics for more information:


- [Setting Up Adobe Sign Services](#)
- [Creating Agreement Templates](#)
- [Adding the Audit Trail](#)
- [Configuring Mappings](#)
- [FAQs](#)

Setting Up Adobe Sign Services


- [Adobe Sign Integration Packages Required](#)
The required packages to run Conga 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 Adobe Sign Services](#)
The steps required to upgrade Adobe Sign Services.

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

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

Install the packages in the following order.


 Beginning in the Spring '20 release, Conga is adding a User Experience Analysis component that collects product usage data. No action is required on your part and there is no impact to any existing product features, system functionality, or configured workflows. No personally identifiable information (PII), nor any other proprietary, confidential, or sensitive data will be collected. If, during installation, you see an "Approve Third-Party Access" prompt, please click **Continue**.

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

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

To install Adobe Sign packages


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

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

6. Select the profile for which you want to install the package. You are recommended to 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 Conga EchoSign Integration packages

 For agreement, you must install the *Conga Contract Lifecycle Management* package 8.325 or higher.
For quotes, you must install the *Conga Proposal Management* package 8.99 or higher.

1. Go to the **Resources > Install Center** tab on the 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.
7. Select the profile for which you want to install the package. You are recommended to select **Install for All Users**.
8. If you want to Install for Specific Profiles, you must define the access level for all profiles. Select from one of the following options.
 - No Access - This is the default setting. Apply this access level to disable all object permissions.
 - Full Access - Apply this access level to assign users permissions to Read, Create, Edit, Delete, View All, and Modify All for all objects.
9. Click **Set**.
10. Click **Install**.

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

Post-Installation Configuration

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


- [Configuring Adobe Sign Admin Settings](#)
- [Basic Customization](#)
- [System Properties](#)
- [Customizing Action Button](#)
- [Running the Migration 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 Conga CLM app. You can perform the same action in Conga CPQ 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.

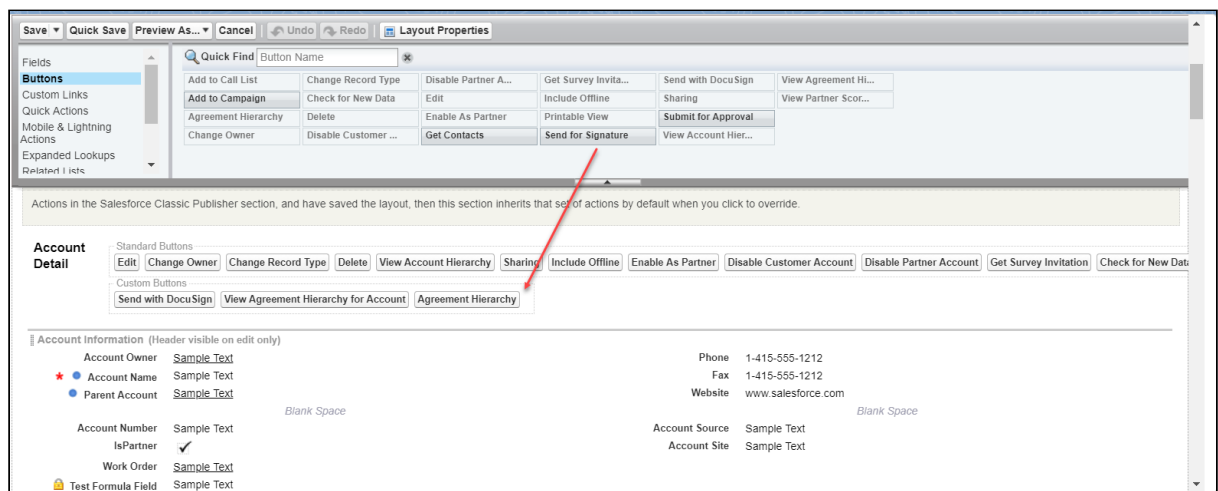
To add Send for Signature button to page layout

1. From the App Launcher, find and open the Conga CLM app. You can perform the same action in Conga CPQ 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 Conga CLM app.
2. Click the **Agreements** tab from the navigation bar. You can perform the same action on the Proposals tab in the Conga CPQ 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**.

-  You need to configure the Apttus-Adobe eSignature Properties custom setting with Apttus_Echosign namespace when sending an agreement for eSignature. You need to configure the Apttus-Adobe eSignature Properties custom setting with Apttus_QPESign namespace when sending a quote or proposal for eSignature.

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
Force Selections	<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>
Don't Copy Signed Documents (For Conga CLM and Conga CPQ)	<p>Select this option if you do not want the system to copy your signed documents from Adobe to Agreement or Quote/Proposal record.</p> <p>If checked, the system will not copy your signed documents from Adobe to 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 Agreement or Quote/Proposal record.</p>
Hide Related Agreement Selection (For Conga CLM)	<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>

Setup > Build > Develop > Custom Settings > Apttus-Adobe eSignature Properties > System Properties	
Name	Description
Update Related Agreements (For Conga CLM)	<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>Note: 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 Selecting Attachments and Templates.</p>
Bypass Sharing	<p>Select this checkbox to bypass the Org Sharing Settings set for Agreement Template 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 Agreement Template object.</p>

Customizing Action Button

To show the **Send For Echosign** custom button in the Action Panel in Lightning Mode, you need to configure the SendForEchosign_Custom action button. For using your own customized buttons in the action panel, you need to create custom formula fields with the

required logic and add them to the agreement layout. To create a custom formula field for action, follow the naming convention outlined as under:

1. Go to **Setup > Object Manager > Agreement** object.
2. Click **Fields and Relationships** from the left navigation panel.
3. Click **New** to create a new custom field.
4. Select **Formula** data type and click **Next**.
5. For **Field Label**, enter `<action_name>_Custom`. For example, to create a Send For Echosign button, enter `SendForEchosign_Custom`.
6. The value in the field label is automatically copied as **Field Name** when you click anywhere outside the field.
7. Select the **Formula Return Type** as Text and click Next.
8. Enter the formula for the action button as per your requirement.

The following is an example of the formula. If you want to see the Lightning user interface when working in Lightning mode, configure the **Apttus_Echosign__LightningSelectAttachment** page in the formula.

Example

```
IF(OR(ISPICKVAL(Apttus__Status_Category__c,"In Authoring"),
AND(ISPICKVAL(Apttus__Status_Category__c,"In Signatures"),
ISPICKVAL(Apttus__Status__c,"Ready for Signatures")),
AND(ISPICKVAL(Apttus__Status_Category__c,"In Signatures"),
ISPICKVAL(Apttus__Status__c,"Signature Declined"))),
IF(OR($User.UIThemeDisplayed == 'Theme4d', $User.UIThemeDisplayed ==
'Theme4t', $User.UIThemeDisplayed == 'Theme4u'), HYPERLINK("/apex/
Apttus_Echosign__LightningSelectAttachment?targetPageURL=/apex/
Apttus_Echosign__EchoSignInfoEdit&id="&Id, IMAGE("/resource/
Apttus_Echosign__eSignature","Send To Other Party For eSignatures"), "_self"),
HYPERLINK("/apex/Apttus_Echosign__SelectAttachment?targetPageURL=/
apex/Apttus_Echosign__EchoSignInfoEdit&id="&Id, IMAGE("/resource/
Apttus_Echosign__eSignature","Send To Other Party For eSignatures"),
"_self")), NULL)
```

⚠ To display an action button in the Action Panel, make sure that the formula entered for the custom formula field returns a non-null value. If the formula returns a Null value, the action button or field would be hidden in the Action Panel.

9. Apply the field's access setting and page layout and click **Save**. Your action button is created.

To learn how to create custom fields, refer to Salesforce Help [Custom Fields | Salesforce](#).

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 Adobe Sign Services

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

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


Preparing for Upgrade

Before you upgrade to Adobe Sign Services on Salesforce Winter '20, 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 Adobe Sign Services since your existing release. After you upgrade Adobe Sign Services to Winter '20, you cannot roll back to any previous release.
- You have [supported platforms and system requirements](#).
- You have access to the **Install Center** on the [Community Portal](#).
- You have administrator privileges to your Salesforce org

Upgrading to Adobe Sign Services Winter '20

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

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

Upgrading Adobe Sign Services from Summer '20 to Winter '20

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

Product	Package Version (Name Number)
Apttus Base Library	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

2. Ensure that you have the following packages and dependent packages to upgrade to Winter '20. These packages are required to utilize the new features and enhancements of Winter '20.

Product	Package Version (Name Number)
Conga Base Library	1.2.123 1.123
Conga Contract Lifecycle Management	11.2.0582 11.582
Conga Quote Management	10.2.0227 10.227
Adobe Sign	22.11
Conga CLM EchoSign Integration	8.2.0049 8.49
Conga Quote 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 Adobe Sign Services managed packages, see [Installing Adobe Sign Services Packages](#).
4. After the upgrade is complete, perform the [Post-Install Configuration](#) tasks.

Upgrading Adobe Sign Services from Spring '20 to Winter '20

1. Go to **Setup > Installed Packages** and ensure that your current Salesforce org has the following Spring '20 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 Winter '20. These packages are required to utilize the new features and enhancements of Winter '20.

Product	Package Version (Name Number)
Conga Base Library	1.2.123 1.123
Conga Contract Lifecycle Management	11.2.0582 11.582
Conga Quote Management	10.2.0227 10.227
Adobe Sign	22.11
Conga CLM EchoSign Integration	8.2.0049 8.49
Conga Quote 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 Adobe Sign Services managed packages, see [Installing Adobe Sign Services Packages](#).
4. After the upgrade is complete, perform the [Post-Installation Configuration](#) tasks.

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 Conga CLM app. You can perform the same action in Conga CPQ app as well.
2. Click the **Agreement Templates** tab from the navigation bar.
3. Click **New**.
4. Enter the **Template Name** and click **Save**.
5. Provide requisite information for the fields pertaining to the **Template Details** tab. The Template Details has the core details that relate the agreements created by the template with the referencing Salesforce object.

Field Name	Description
Agreement Name	Enter a name for the agreement or accept the default name. All agreements are initially created with this name.
Salesforce Object	Select the Salesforce Master Object to be referenced for this agreement template (e.g. Account, Opportunity, Agreement).
Mapped Data	<p>Click Map data into agreement fields to define the mapping of fields. Select one of the following Mapping Method:</p> <ul style="list-style-type: none"> • Select from Object - Select this option to map a field of selected Salesforce object to an agreement field. • Input Specific Value - Select this option to map a specific field to an agreement field. <p>Click Save.</p>
Auto Send	<p>Enable this option if you want to automatically send an agreement after you click the Send for Signature button. The preview of the agreement is not displayed.</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>
Advanced Options	
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"> • E-Signature - Electronic signatures will be collected by default. • Written Signature - Recipients will be instructed to download the document, physically sign it, scan the signed document, and upload that document to Adobe Sign.

- 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"> • Salesforce CRM & Files - Your personal library. Any documents you upload from your system are stored in this library for future use. • Salesforce Documents - The Salesforce library that is shared amongst users. • Adobe Sign Library - The library content stored in the Adobe Sign system.
Advanced Options	

Field Name	Description
<p>Add a document from object or runtime variable</p>	<p>Select a document or object from a Salesforce object or runtime variable.</p> <div data-bbox="612 434 1426 680" 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"> • Add from Salesforce Object <ul style="list-style-type: none"> • Source Type - Choose the object type for the document between File or Attachment. • Document Selection - Select the document to attach based on one of these criteria: <ul style="list-style-type: none"> • Latest Document • Oldest Document • All Documents • Document Selection Determined By - Select how the file selection is determined for latest or oldest files. • Add from Opportunity Quote - Define the following fields, as required. <ul style="list-style-type: none"> • Quote Type - Select which quote object to use for document selection. • Quote Type Determined By - Select how the quote selection is determined for latest or oldest files. • Quote Document Type - Select which quote document to add from: <ul style="list-style-type: none"> • Latest Document • Oldest Document • All Documents • Runtime Variable - Dynamically add an attachment from an object. <ul style="list-style-type: none"> • Add a runtime variable name - Specify the variable and ID type from your Salesforce object.
<p>Add Form Field Template</p>	<p>Import a field template from the Adobe Sign library.</p>

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

Field Name	Description
Signing Workflow	<p>Select one of the following option:</p> <ul style="list-style-type: none"> • All Recipients Sign - All of the recipients defined in the template will be required to participate in the process, according to the roles applied to them. This is the setting for all agreements that aren't expected to be signed by the sender only. • Only Sender Signs - Enable this option to add the "Only Sign" functionality to the template.
Recipients	<p>Recipients can be added by:</p> <ul style="list-style-type: none"> • Salesforce Object • Email • Runtime Variable
Message	<p>Enter the message that you want to deliver to the recipients. The Message section imports the Agreement Name from the Template Details tab.</p>
Advanced Options	
Enable Hosted Signature (in-person signature)	<p>Enable to facilitate hosted, in-person signing if the signer is available.</p>
Enable Preview and Position Fields	<p>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.</p>
Send on Behalf of	<p>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.</p>
Advanced Verification Methods	<p>You can configure the verification methods for recipients if you are controlling signer verification based on Internal / External recipient status.</p>

8. Configure the merge mapping or data mapping in the **Data Mapping** tab.
 - **Merge Mapping** - Select a data mapping to merge Salesforce fields into an agreement before sending it.

- **Data Mapping** - Select a data mapping to be used to map inputs from a signed agreement back into Salesforce.

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

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

10. Click **Save**.

Adding the Audit Trail

Audit Trail is a separate document that Adobe provides when generating the final signed document. Once the agreement is signed, a signed copy of the PDF is stored within our application. Conga 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 Conga CLM app. You can perform the same action in Conga CPQ 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 **Agreement** from the picklist menu.
8. Click **Select**.
9. Under the File Mapping section, click **Add Mapping**.
10. From **Which File to Add?** picklist menu, select **Audit Trail**.
11. Click **Save**.

For more information on sending a document for eSignature, refer *Sending for eSignature* topic in *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	https://helpx.adobe.com/content/dam/help/en/sign/Adobe_Sign_Best_Practices_SFDC.PDF

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

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](#).

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	

Adobe Sign Services for Users

Select one of the following topics for more information:

- [Getting Started](#)
- [Adobe Sign Integration Life cycle](#)
- [Sending for eSignature](#)

Getting Started

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

Logging into Adobe Sign Services

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

Note

Do not use Back button on the browser when using the Adobe Sign Services.

Prerequisites

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

To log in to Adobe Sign Services

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

Or

If your organization is using a sandbox or test environment to access 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**.

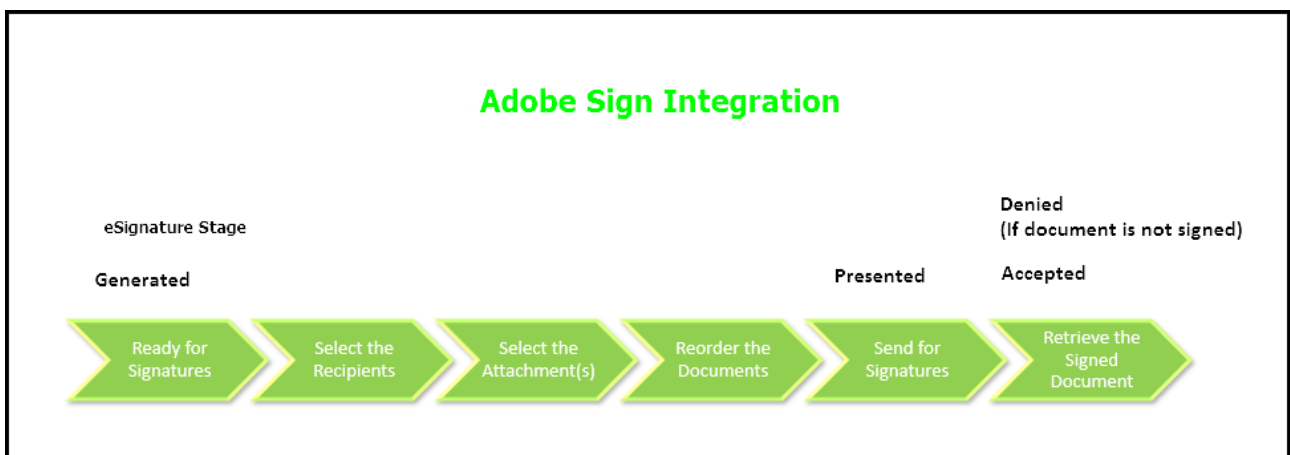
You are successfully logged into Adobe Sign Service.

Proposals and Agreements

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

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 eSignature Stage/Status field changes according to the activities. The signature stages/statuses are shown in the 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 Adobe Sign Services. 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 an agreement. You can manually attach a document using the Salesforce attachment process, or you can use Document Generation.

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

- **Manually attach one or more documents**
You can manually attach the document using the Salesforce attachment process.
- **Attach a document using Document Generation**
You can use templates to generate a document using Salesforce field values. You can use this feature only if your system admin has configured Add Attachments Enabled.

To attach a document manually

1. Select the agreement that you want to attach the document.
2. Under the **Notes & Attachments** related list, click **Attach File**.
3. Click **Choose File** and select the agreement that you want to upload.

Note

Ensure that you do not upload a file of size over 12 MB. You can attach a file larger than 12 MB, but it will not be included in the envelope being sent for eSignature.


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

Note 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 **Send For Echosign** button. After clicking the **Send For Echosign** 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.

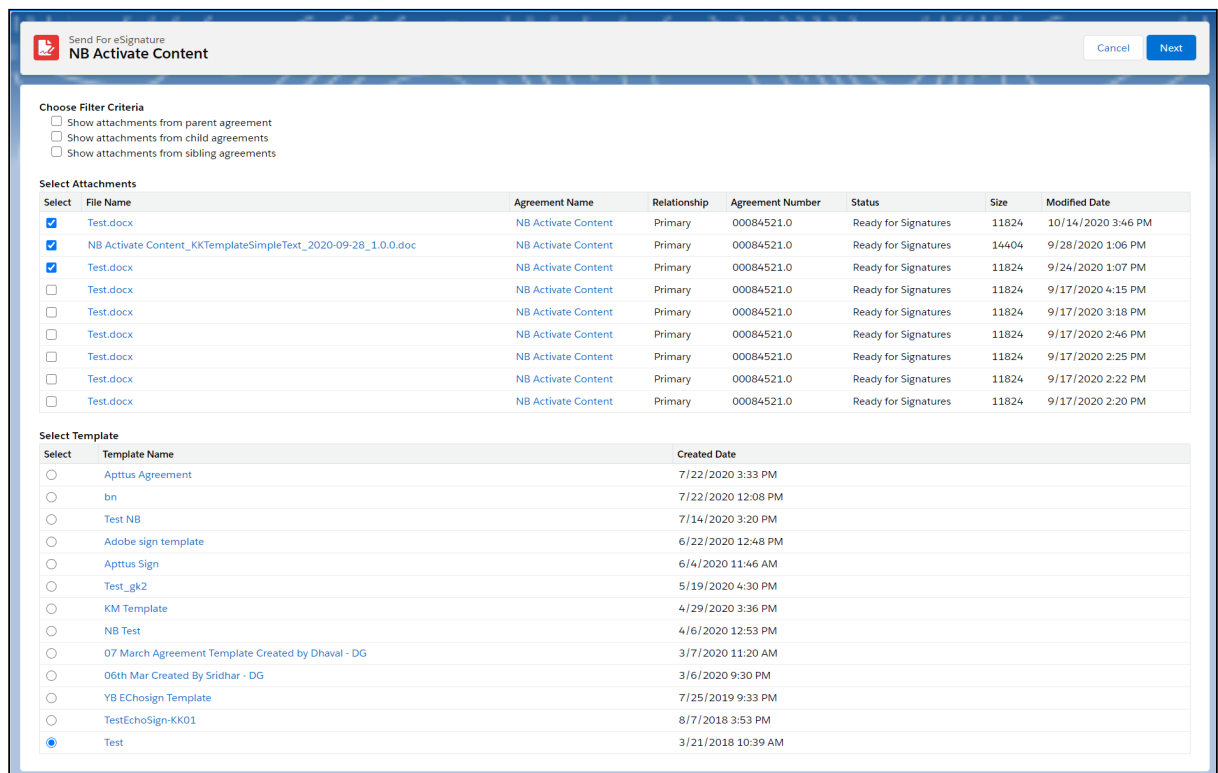
 Prior to Summer '20 release, signed documents were saved in the Notes & Attachments related list even if the Document Versioning was enabled.

To select attachment and template

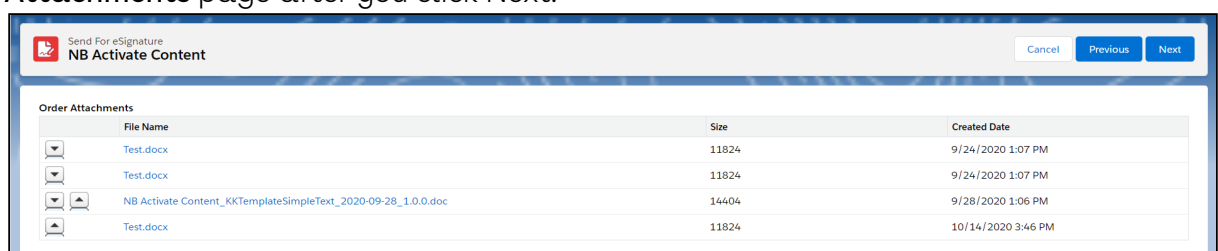
1. Click the **Send For Echosign** button.
2. Select the **Show attachments from parent agreement** checkbox to display the documents, added in Notes & Attachments related list, in the Select Attachments section.
-or-
Select the **Show attachments from sibling agreements** checkbox to display the documents, added in Notes & Attachments related list, in the Select Attachments section.
-or-
Select the **Show attachments from child agreements** checkbox 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. Under the **Select Attachments** section, select the attachments that you want to send for eSignature. You can select multiple attachments.
4. Under the **Select Template** section, select a template that you want to use to send your document for eSignature.
5. Click **Next**.
6. If you have selected multiple attachments, you are redirected to the **Order Attachments** page after you click Next.



7. Set the order of attachments by clicking this  icon and click **Next**.
8. You are redirected to the Adobe Sign Actions page.

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

Sending Documents with Related Agreements

Adobe Sign Services 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 the 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 the 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 the 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 the 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 the 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 the 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 the 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 the Agreements record and the Agreement Status is updated only in primary agreement.

Contact 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, click **Add Recipient**.
2. 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 email address manually.
Lead	Select this option if you want to enter an existing Lead as a recipient.
Group	Select this option if you want to enter an existing group as a recipient.

3. 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, Contact, User, or Lead as the Recipient Type.
4. Click **Add Recipient** and perform steps 2 and 3, if there is a requirement to add more recipients.
5. Click **Add Me** to add yourself as a recipient.
6. Click **Add CC**. Enter the email address of the recipients to send a copy of the document.
7. 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.
 - Enter the order for recipients to allow the recipients to sign the document in the defined order.
8. Select the **I need to sign**, 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.
9. Select **Host signing for the first signer** to allow the sender host in-person signing for the first signer.
10. Under **Identity Verification**, select **Email** or **Password**. For Password, you must enter the password in **Password** text box.
11. Under the **Details** section, The **Agreement Name** and **Message** is displayed.

- For **Opportunity**, click the  icon and select an opportunity that you want to associate with this agreement.
- For **Contract**, click the  icon and select a contract that you want to associate with this agreement.


12. Under the **Options** section, select the following values:

- 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.
- Select the appropriate **Completion Deadline** for the agreement.
- Select an option from **Create Reminder** 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.

- Select the **Recipient Language**.
- Select the **Signature Type**. The available options are:
 - **eSignature**
 - **Written Signature**

13. If you want to add more documents to the existing attachments, for eSignature, click **Add Files** 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.

14. Select the **Preview and Add Signature Fields**, If you want to preview the document or update the position of signature fields before the document is sent for eSignature.

- Click **Next**.

- Drag the required fields to the intended area.

15. Click **Send**.

Adobe Sign Services 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**.

Adobe Sign Services for REST API Developers

Adobe Sign Services Features by Release

Review the latest Adobe Sign Services Features by Release document.

- [Features by Release](#)

Features by Release

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

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