Adobe Sign Services

Table of Contents

Adobe Sign Services Release Notes 6

Spring21.06.18 Release Notes 6

Packages 7

System Requirements and Supported Platforms 7

New Features 8

Enhancements 8

Data Model Changes 8

Resolved Issues 8

Known Issues 9

Spring21.05.10 Release Notes 9

Packages 10

System Requirements and Supported Platforms 11

New Features 11

Enhancements 11

Data Model Changes 11

Resolved Issues 12

Known Issues 12

Spring21.03.26 Release Notes 12

Packages 13

System Requirements and Supported Platforms 14

New Features 14

Enhancements 15

Data Model Changes 15

Resolved Issues 15

Known Issues 15

Spring '21 Release Notes 15

Packages 16

System Requirements and Supported Platforms 17

New Features 17

Enhancements 17

Data Model Changes 18
Resolved Issues 18
Known Issues 18
About Adobe Sign Services 19
Adobe Sign Integration Life cycle 19
Key Terminology 20
What's New in Adobe Sign Services Documentation 22
Adobe Sign Services for Administrators 24
Setting Up Adobe Sign Services 24
Installing Adobe Sign Packages 24
Post-Installation Configuration 27
Upgrading Adobe Sign Services 38
Creating Agreement Templates 41
To create an agreement template 41
Adding the Audit Trail 47
To disable audit trail setting 48
To set up file mapping for audit trail 48
Configuring Mappings 48
FAQs 49
Adobe Sign Services for Users 51
Getting Started 51
Logging into Adobe Sign Services 51
Proposals and Agreements 52
Adobe Sign Integration Life cycle 52
Sending for eSignature 52
Adding Attachments 53
Selecting Attachments and Templates 54
Managing Adobe Sign Actions 59
Adobe Sign Services for REST API Developers 62
About REST API Guide 62
What's New in REST API Guide 63
Adobe Sign Services REST API 63

Basics....63
Endpoint....63
Versions....64
Content Type....64
Includes....64
Caching....64
Errors....64
Adobe Sign Services Features by Release....65
Features by Release....65
Community & Learning Center Resources....66
Ready to get started?....66

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.

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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.

- Spring21.06.18 Release Notes
- Spring21.05.10 Release Notes
- Spring21.03.26 Release Notes
- Spring '21 Release Notes

Spring21.06.18 Release Notes

Release Notes contain the following information about Adobe Sign Services Spring21.06.18 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

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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 **(New)**	23.1
Conga Base Library	2.0.150 | 2.150
Conga Contract Lifecycle Management	12.0.0605 | 12.605
Conga CLM Adobe Sign Integration **(New)** (Previously known as Conga CLM EchoSign Integration)	9.1.0064 | 9.64
Conga Quote EchoSign Integration	2.0.0014 | 2.14
Conga Quote Management	11.0.0242 | 11.242

⚠ If you are upgrading the Conga CLM Adobe Sign 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.

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System Requirements	
Item	**Requirement**
Operating System	Standard Salesforce.com requirements. See Salesforce PDF.
Browser	Conga supports the following browsers: • Microsoft Edge Chromium • Google Chrome 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. ⚠ Internet Explorer is not supported.
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

There are no enhancements in this release.

Data Model Changes

There are no data model changes in this release.

Resolved Issues

The following table lists the issues resolved in this release.

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Case Number	Conga Internal ID	Description
00115853	ESIGN-172	When clicking Send for eSignature, file names were duplicated if selected from Files and not uploaded manually. Prior to Conga CLM Adobe Sign Integration 9.64, you were redirected to the **Order Attachments** page, where the issue occurred. The reordering of attachments is now available out of the box by Adobe, and will now be redirected to the Adobe Sign page. See the instructions for Selecting Attachments and Templates for more information.

Known Issues

There are no known issues in this release.

Spring21.05.10 Release Notes

Release Notes contain the following information about Adobe Sign Services Spring21.05.10 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

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Packages

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Product	Latest Certified Version (Name | Number)
Adobe Sign **(New)**	23.1
Conga Base Library	2.0.150 | 2.150
Conga Contract Lifecycle Management	12.0.0605 | 12.605
Conga CLM Adobe Sign Integration **(New)** (Previously known as Conga CLM EchoSign Integration)	9.1.0062 | 9.62
Conga Quote EchoSign Integration	2.0.0014 | 2.14
Conga Quote Management	11.0.0242 | 11.242

If you are upgrading the Conga CLM Adobe Sign 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.

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System Requirements and Supported Platforms

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System Requirements	
Item	**Requirement**
Operating System	Standard Salesforce.com requirements. See Salesforce PDF.
Browser	Conga supports the following browsers: • Microsoft Edge Chromium • Google Chrome 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. ⚠ Internet Explorer is not supported.
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

There are no enhancements in this release.

Data Model Changes

There are no data model changes in this release.

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Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Conga Internal ID	Description
00115853	ESIGN-172	When clicking on Send for eSignature, file names were duplicated if selected from Files and not uploaded manually.

Known Issues

There are no known issues in this release.

Spring21.03.26 Release Notes

Release Notes contain the following information about Adobe Sign Services Spring21.03.26 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
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- Known Issues: Lists known issues that are applicable in this release

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Product	Latest Certified Version (Name | Number)
Adobe Sign **(New)**	23.1
Conga Base Library	2.0.150 | 2.150
Conga Contract Lifecycle Management	12.0.0605 | 12.605
Conga CLM Adobe Sign Integration **(New)** (Previously known as Conga CLM EchoSign Integration)	9.1.0061 | 9.61
Conga Quote EchoSign Integration	2.0.0014 | 2.14
Conga Quote Management	11.0.0242 | 11.242

If you are upgrading the Conga CLM Adobe Sign 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.

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Item	**Requirement**
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Browser	Conga supports the following browsers: • Microsoft Edge Chromium • Google Chrome 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. ⚠ Internet Explorer is not supported.
Adobe Sign System Requirements	See System Requirements for Adobe.

New Features

The following feature is new to Adobe Sign Services in this release.

Supporting File as new Document Storage Type

With this release, the File as the new document storage type is supported when sending agreement documents for eSignature using Adobe Sign. You can configure the **Agreement Document Storage Type** custom setting in **Adobe Sign Settings** to define the document storage type. The supported document storage types are Files and Attachments.

Get Started

For details on configuring document storage type, refer to Configuring Document Storage Type in *Adobe Sign Services Spring '21 Administrator Guide*.

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Enhancements

There are no enhancements in this release.

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.

Spring '21 Release Notes

Release Notes contain the following information about Adobe Sign Services Spring '21 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
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Product	Latest Certified Version (Name | Number)
Adobe Sign	22.11
Conga Base Library **(New)**	2.0.150 | 2.150
Conga Contract Lifecycle Management **(New)**	12.0.0605 | 12.605
Conga CLM Adobe Sign Integration **(New)** (Previously known as Conga CLM EchoSign Integration)	9.0.0056 | 9.56
Conga Quote EchoSign Integration	2.0.0014 | 2.14
Conga Quote Management **(New)**	11.0.0242 | 11.242

The latest version of Abobe Sign v23 is not supported.

If you are upgrading the Conga CLM Adobe Sign 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.

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> 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

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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.

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Enhancements to Send For eSignature User Interface

You can filter the templates based on the Agreement Type when sending documents for eSignature. To filter the templates according to the Agreement Type, you must enable the **Enable Template Filtering** property in **Apttus-Adobe eSignature Properties** Custom Settings. You can also sort the templates by clicking the column names. Every time you click the column name the sorting switches between ascending and descending order.

Get Started

For details on sending a document for eSignature, refer to Sending for eSignature in *Adobe Sign Services Spring '21 User Guide*.

New REST API for Send for eSignature

In this release, a new REST API is introduced to send documents for eSignature.

Get Started

For details on REST API, refer to Adobe Sign Services REST API in *Adobe Sign Services Spring '21 REST API 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.

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About Adobe Sign Services

Adobe Sign integration 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.

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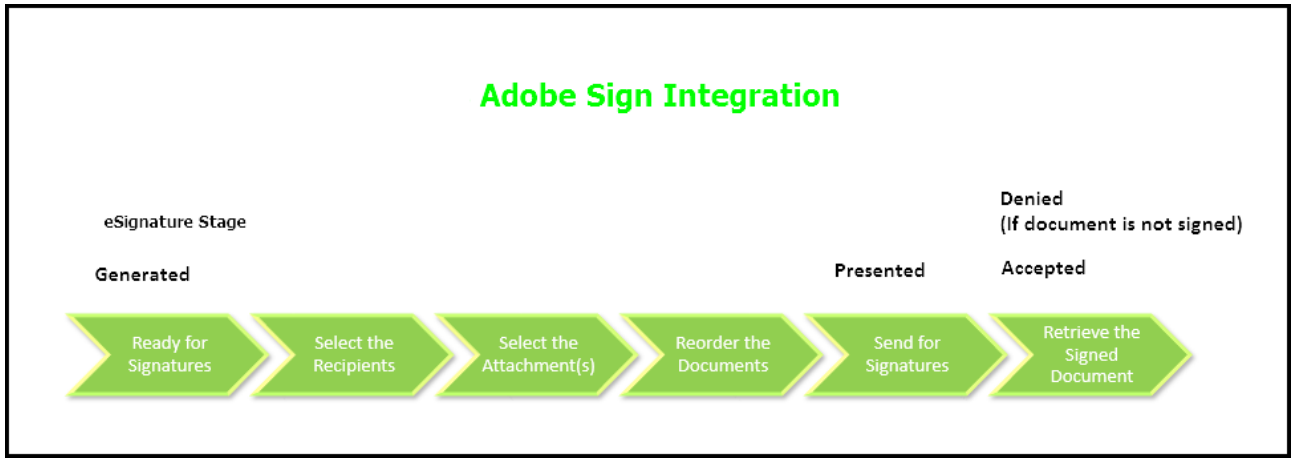

This guide describes the following tasks:

Administrator Tasks	User Tasks
• Installing Adobe Sign Services • Creating Agreement Templates • Adding the Audit Trail • Configuring Mappings	• 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.

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

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What's New in Adobe Sign Services Documentation

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

Spring '21

Document	Topic	Description
Spring '21	Configuring Conga-Adobe Settings	New topic.
	Configuring Document Storage Type	New topic.
	Upgrading Adobe Sign Services	Modified topic. Updated Conga CLM EchoSign Integration package name to Conga CLM Adobe Sign Integration for Spring '21.
	Selecting Attachments and Templates	Modified topic. Added note about Enable File comply system property.
	System Properties	Modified topic. Added Enable Template Filtering property.
	Selecting Attachments and Templates	Modified topic. Interface behavior has changed.
	Selecting Attachments and Templates	Modified topic. Updated description and screenshot.

Winter '20

Document	Topic	Description
Winter 2020	Selecting Attachments and Templates	Modified topic. Updated screenshots.

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Document	Topic	Description
	Customizing Action Button	New topic.
	Upgrading Adobe Sign Services	Modified topic. Updated as per the latest release.

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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.

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⚠ 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.

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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**.

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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
- Configuring Conga-Adobe Custom Settings
- System Properties
- Configuring Document Storage Type
- 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**.

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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.

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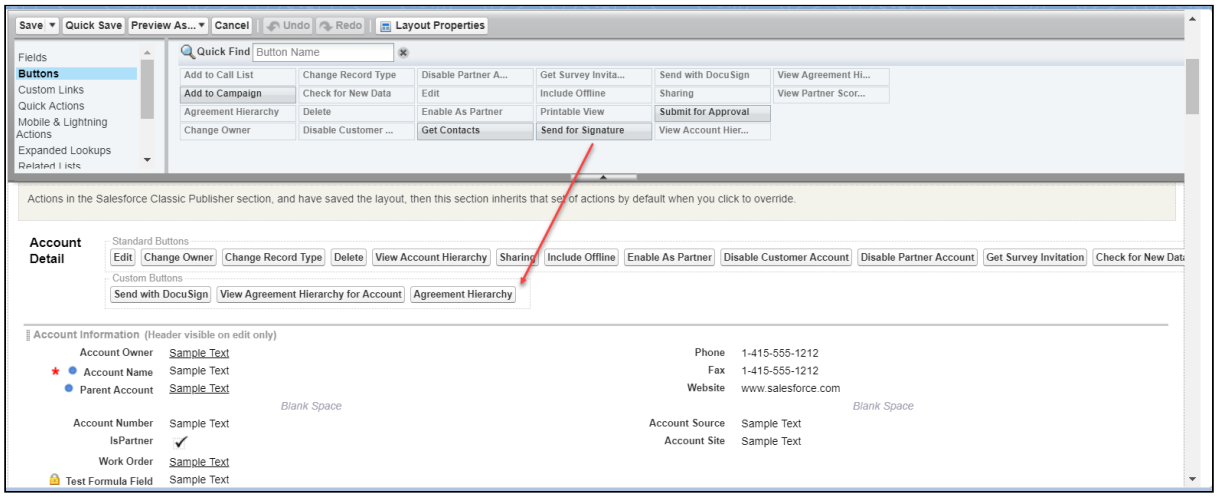

9. Click **Save**.

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**.

Configuring Conga-Adobe Custom Settings

Conga-Adobe Custom Settings contains a **Don't Copy Opportunity** flag that allows you to prevent the Opportunity field from being copied to the Adobe Agreement object. This can be set as a default for the organization, or for individual Profile and User levels.

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Levels of Priority

Level	
User	User location will override both Profile and Default settings.
Profile	Profile location will override Default settings.
Default	Sets the standard for the Organization, is overwritten by both Profile and User settings.

⚠ Your users that have Salesforce Platform licenses will require this configuration at least at the Profile level. If this Custom Setting is not configured, the Opportunity field is copied to the Adobe Agreement and prevents Platform License users from sending agreement documents for eSignature and results in the following error: "You do not have the level of access necessary to perform the operation you requested. Please contact the owner of the record or your administrator if access is necessary. (echosign_dev1__SIGN_Agreement__c)"

To configure the Custom Setting for Profile/User

1. Go to **Setup > Build > Develop > Custom Settings** and click Manage next to Conga-Adobe Settings.
2. Under the related list section, click **New**.
3. Set the **Location** field to Profile and select your desired profile, or User and select the desired User.
4. Select the **Don't Copy Opportunity** to disallow your desired User/profile from copying the Agreement record to the Opportunity.
5. Click **Save**.

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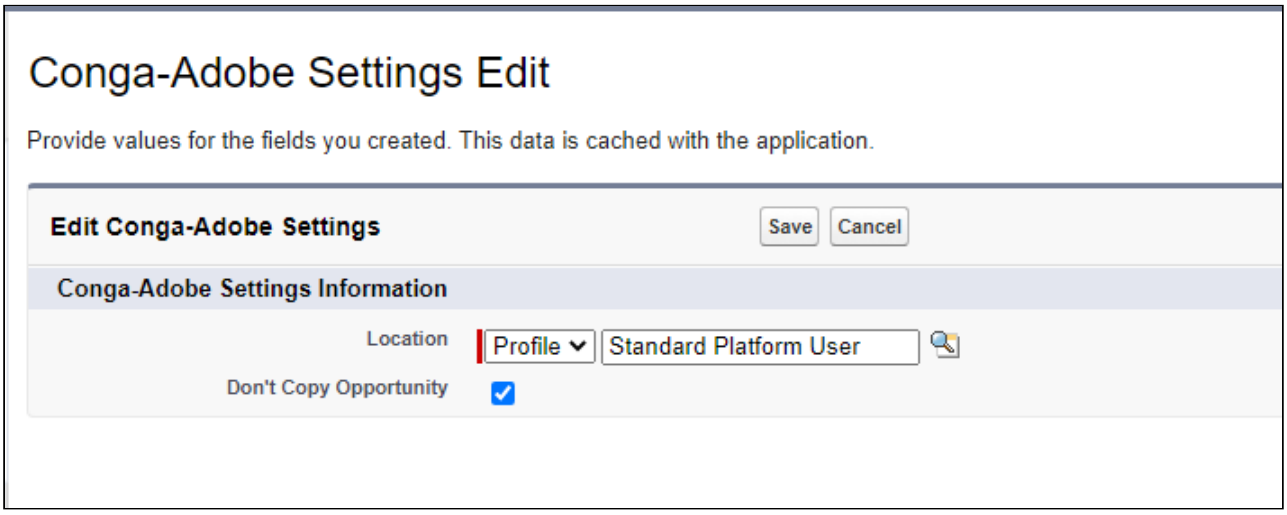

To configure the Custom Setting for Default

1. Go to **Setup > Build > Develop > Custom Settings** and click Manage next to Conga-Adobe Settings.
2. Click the **Edit** button.
3. Select the **Don't Copy Opportunity** to disallow all User/profiles from copying the Agreement record to the Opportunity.

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.

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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	Select this option if you want to force your users to select Attachment(s) and a Template when available while sending a document for eSignature. If checked, the system throws an error if the user does not select attachment(s) and a template, when available. If unchecked, the system does not throw any error, even if the user does not select the template, when available.
Don't Copy Signed Documents (For Conga CLM and Conga CPQ)	Select this option if you do not want the system to copy your signed documents from Adobe to Agreement or Quote/Proposal record. 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. If unchecked, the system will copy your signed documents from Adobe to Agreement or Quote/Proposal record.
Hide Related Agreement Selection (For Conga CLM)	Select this option if you want to hide the option for Related Agreement Selection. If checked, the users will not see the Related/Child/Parent/ Sibling agreements on the Select Attachment user interface. If unchecked, the users will see the Related/Child/Parent/ Sibling Agreements on the Select Attachment user interface.

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

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Configuring Document Storage Type

With the Adobe Sign package version v23, Adobe Sign has introduced Files as the new document storage type. You can configure the **Agreement Document Storage Type** custom setting in **Adobe Sign Settings** to define the document storage type. The supported document storage types are Files and Attachments. If you leave this custom setting blank, the system considers Attachments as the default value.

To configure agreement document storage type

1. Go to **Setup** > **Custom Code** > **Custom Settings** and click **Manage** for **Adobe Sign Settings**.
2. Click **Edit**.
3. Enter the value for **Agreement Document Storage Type**.
4. Click **Save**.

Agreement Document Storage Type and Enable File

The **Agreement Document Storage Type** custom setting is dependent on the **Enable File** comply system property. For more information on the Enable File comply system property, refer to *Comply System Properties* topic in *Conga CLM Administrator Guide*.

When you send an agreement document for eSignature, you can view documents in the **Select Attachments** section according to the **Enable File** comply system property. For more information on selecting attachments when sending documents for eSignature, refer to Selecting Attachments and Templates in *Adobe Sign Services User Guide*.

The following table provides the details about how **Agreement Document Storage Type** custom setting works with the **Enable File** comply system property when sending documents for eSignature:

Enable File	When sending documents for eSignature	Agreement Document Storage Type	Result
True	Documents with File type are displayed while selecting attachments.	Files	Documents are successfully sent for eSignature.

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Enable File	When sending documents for eSignature	Agreement Document Storage Type	Result
False	Documents with Attachment type are displayed while selecting attachments.	Files	Documents are not sent for eSignature and an error message is displayed.
True	Documents with File type are displayed while selecting attachments.	Attachments	Files are converted into Attachments and attachments are added to the Adobe Agreement.
False	Documents with Attachment type are displayed while selecting attachments.	Attachments	Documents are successfully sent for eSignature.

If you want to use the Files document type in Adobe Sign, you must set the Enable File comply system property to true in Conga CLM and convert Attachments to Files. For more information on converting attachments to files, refer to Converting Attachments to Files in *Conga CLM Administrator Guide*.

After all recipients have completed the signing process, the signed documents are saved in agreement with the File or Attachment type. The storage type is defined by the **Enable File** comply system property and **Agreement Document Storage Type** custom setting. The following table provides the details about how documents are saved in agreement:

Enable File	Agreement Document Storage Type	Agreement Document Versioning	Result
True	Files	True	A document version is created with the File type and saved under Document Versions Related list.

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Enable File	Agreement Document Storage Type	Agreement Document Versioning	Result
True	Files	False	Documents with File type are saved under Notes & Attachments and Files related list.
True	Attachments	True	Attachments are converted into Files and a document version with File type is saved under the Document Versions Related list.
True	Attachments	False	Attachments are converted into Files and documents with File type are saved under Notes & Attachments and Files related list.
False	Files	NA	Documents are not sent for eSignature.
False	Attachments	True	A document version is created with the Attachment type and saved under Document Versions Related list.
False	Attachments	False	Documents with Attachments type are saved under Notes & Attachments related list.

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:

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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.

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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.

> 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

- 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

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existing release. After you upgrade Adobe Sign Services to Spring '21, 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

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 Adobe Sign Services Spring '21

This section describes step-by-step instructions to upgrade from Winter '20 and Summer '20 to Spring '21.

> ⚠ If you are upgrading the Conga CLM Adobe Sign 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 Winter '20 to Spring '21

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

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

2. Ensure that you have the following packages and dependent packages to upgrade to Spring '21. These packages are required to utilize the new features and enhancements of Spring '21.

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Product	Package Version (Name | Number)
Conga Base Library	2.0.150 | 2.150
Conga Contract Lifecycle Management	12.0.0605 | 12.605
Conga Quote Management	11.0.0242 | 11.242
Adobe Sign	22.11
Conga CLM Adobe Sign Integration (Previously known as Conga CLM EchoSign Integration)	9.0.0056 | 9.56
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 Summer '20 to Spring '21

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

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2. Ensure that you have the following packages and dependent packages to upgrade to Spring '21. These packages are required to utilize the new features and enhancements of Spring '21.

Product	Package Version (Name | Number)
Conga Base Library	2.0.150 | 2.150
Conga Contract Lifecycle Management	12.0.0605 | 12.605
Conga Quote Management	11.0.0242 | 11.242
Adobe Sign	22.11
Conga CLM Adobe Sign Integration **(New)** (Previously known as Conga CLM EchoSign Integration)	9.0.0056 | 9.56
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.**

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5. Provide requisite information for the fields pertaining to the **Template Details** tab. The Template Details has the core details that relate the agreements created by the template with the referencing Salesforce object.

Field Name	Description
Agreement Name	Enter a name for the agreement or accept the default name. All agreements are initially created with this name.
Salesforce Object	Select the Salesforce Master Object to be referenced for this agreement template (e.g. Account, Opportunity, Agreement).
Mapped Data	Click **Map data into agreement fields** to define the mapping of fields. Select one of the following **Mapping Method**: • **Select from Object** - Select this option to map a field of selected Salesforce object to an agreement field. • **Input Specific Value** - Select this option to map a specific field to an agreement field. Click **Save**.
Auto Send	Enable this option if you want to automatically send an agreement after you click the **Send for Signature** button. The preview of the agreement is not displayed. ⓘ For Auto Send to work, you must have at least one recipient and attachment defined in the agreement template.
Advanced Options	

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Field Name	Description
Agreement Type	Select an agreement type. You can filter the templates based on the Agreement Type while sending documents for eSignature. To filter the templates according to the Agreement Type, you must enable the **Enable Template Filtering** property in **Apttus-Adobe eSignature Properties** Custom Settings. For more information on how to configure System Properties, refer to System Properties in the *Adobe Sign Services Administrator Guide*.
Language	Select the language of the recipients.
Select the signature type for this agreement	Select the default value for the signature type to be collected: • **E-Signature** - Electronic signatures will be collected by default. • **Written Signature** - Recipients will be instructed to download the document, physically sign it, scan the signed document, and upload that document to Adobe Sign.

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

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

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Field Name	Description
Advanced Options	

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Field Name	Description

Add a document from object or runtime variable	Select a document or object from a Salesforce object or runtime variable.
	
	Some salesforce master objects offer additional options for the source of the document (e.g., If the Salesforce Object defined on the Template Details tab is Opportunity, you will have an additional source option of Add from Opportunity Quote).
	
	There are three options:
	• **Add from Salesforce Object**
	  • **Source Type** - Choose the object type for the document between File or Attachment.
	  • **Document Selection** - Select the document to attach based on one of these criteria:
	  • Latest Document
	  • Oldest Document
	  • All Documents
	  • **Document Selection Determined By** - Select how the file selection is determined for latest or oldest files.
	• **Add from Opportunity Quote** - Define the following fields, as required.
	  • **Quote Type** - Select which quote object to use for document selection.
	  • **Quote Type Determined By** - Select how the quote selection is determined for latest or oldest files.
	  • **Quote Document Type** - Select which quote document to add from:
	  • Latest Document
	  • Oldest Document
	  • All Documents
	• **Runtime Variable** - Dynamically add an attachment from an object.
	  • **Add a runtime variable name** - Specify the variable and ID type from your Salesforce object.

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

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

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

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

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

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

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

10. Click **Save**.

Adding the Audit Trail

Audit Trail is a separate document that Adobe provides when generating the final signed document. Once the agreement is signed, a signed copy of the PDF is stored within our application. 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

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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

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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.

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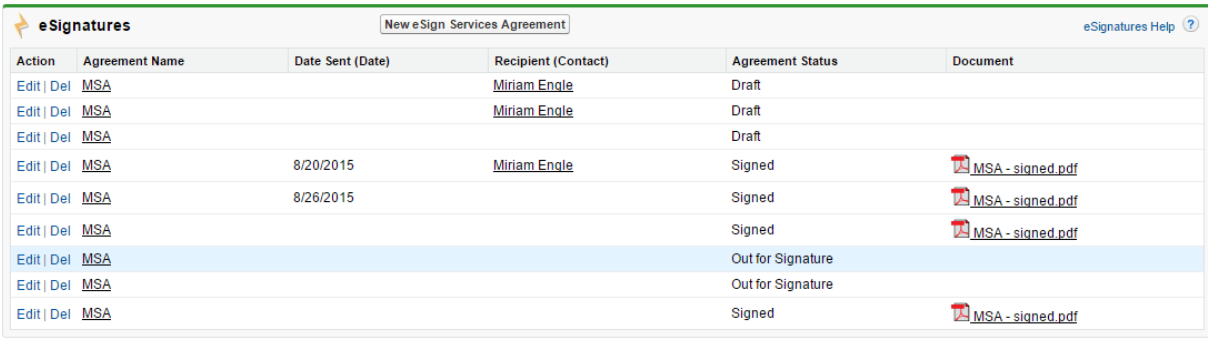
7. Provide requisite information for other fields.
8. To send the agreement for signature, click **Send for Signature**.
   -or-
   To save the agreement, click **Save Agreement**.

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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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.

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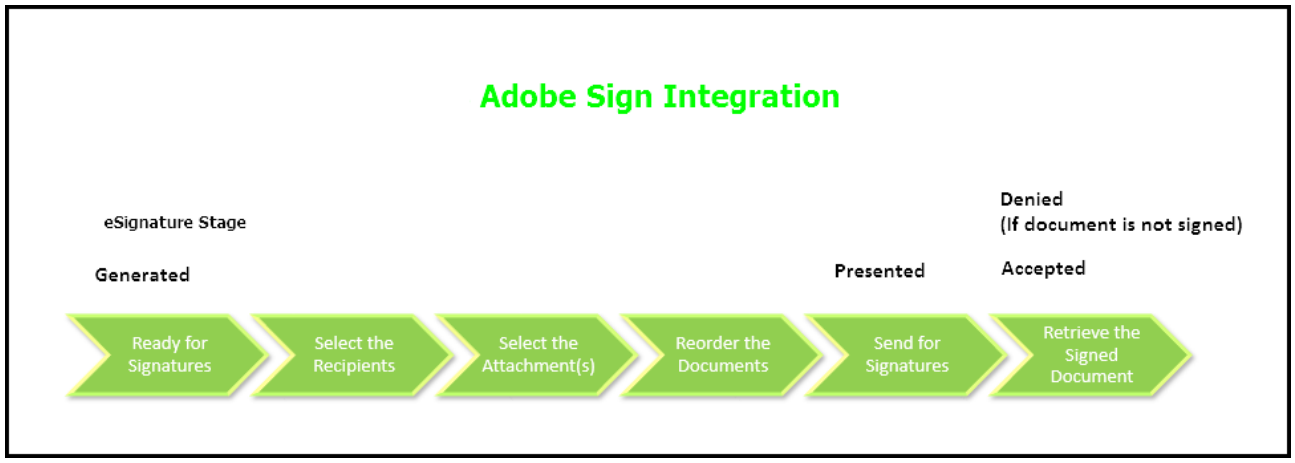
Proposals and Agreements

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

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- 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**.

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

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Selecting Attachments and Templates

After adding the attachments manually to the Notes & Attachments or Files related list, you must click **Send For Adobe Sign**. After clicking the **Send For Adobe Sign**, 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.

> ⓘ The documents in the **Select Attachments** view are displayed based on the **Enable File** comply system property. If this property is set to true, documents with File type are displayed. If this property is set to false, documents with Attachments type are displayed. For more information, refer to Configuring Document Storage Type in *Adobe Sign Services Administrator Guide*.

The templates are by default sorted in ascending order of Template Name in the **Select Template** section. You can sort the templates by clicking the column names. Every time you click the column name the sorting switches between ascending and descending order. The templates are filtered based on the Agreement Type value and if the template is marked as **Active**. If your template is **Active** and the Agreement Type matches with the Record Type of the selected agreement record, you see that template in the list of available templates. To filter the templates according to the Agreement Type, you must enable the **Enable Template Filtering** property in **Apttus-Adobe eSignature Properties** Custom Settings. For more information on how to configure System Properties, refer to System Properties in the *Adobe Sign Services Administrator Guide*.

To select attachment and template

1. Click **Send For Adobe Sign**.
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

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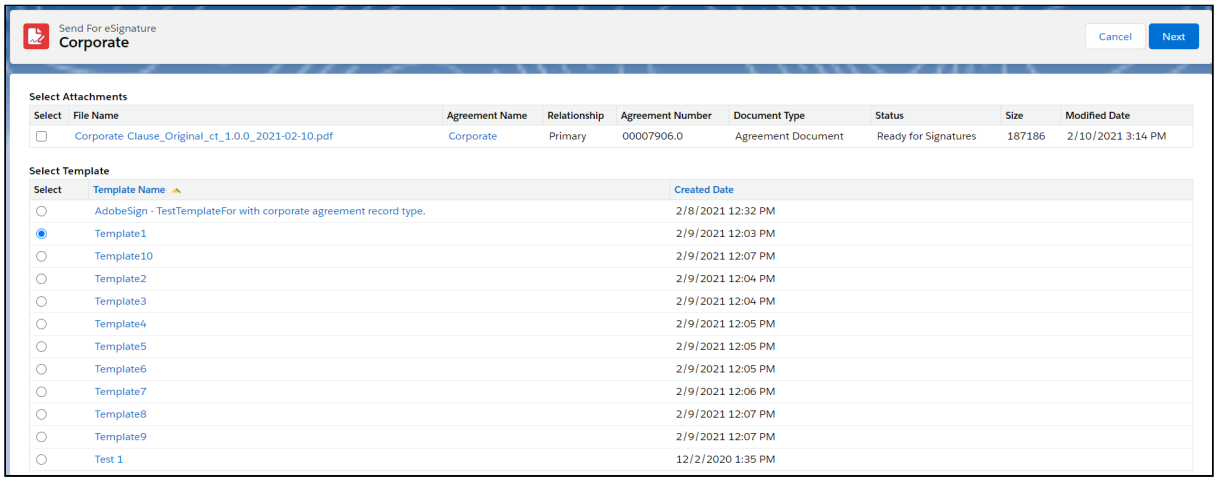
documents, added in Notes & Attachments related list, in the Select Attachments section.
-or-
Select the **Show attachments from child agreements** checkbox to display the documents, added in Notes & Attachments related list, in the Select Attachments section.

> **Note**
>
> The visibility of Show attachments from parent agreements 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**.

> Prior to Conga CLM Adobe Sign Integration 9.64, you are redirected to the **Order Attachments** page after you click Next. The reordering of attachments is now available out of the box by Adobe.

6. You are redirected to the Adobe Sign Actions page. If you have selected multiple attachments, you are able to reorder them under the Files section of the page by dragging and dropping them into the desired order.

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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.

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Hide Related Agreement Selection checked?	Don't Copy Signed Documents checked?	Update Related Agreements checked?	Result
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.
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.

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Hide Related Agreement Selection checked?	Don't Copy Signed Documents checked?	Update Related Agreements checked?	Result
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.
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.

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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.

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- 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**

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- **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**.

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Adobe Sign Services for REST API Developers

Select one of the following topics for more information:

- About REST API Guide
- What's New in REST API Guide
- Adobe Sign Services REST API

About REST API Guide

dobe Sign Services REST API Guide explains the REST APIs provided by Conga Adobe Sign integration.

Topic	Description
What's Covered	This guide walks the API developers through the complete list of REST APIs provided by Conga Adobe Sign integration.
Primary Audience	REST API Developer
IT Environment	Refer to the latest 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 the What's New topic.
Other Resources	• *Adobe Sign Services User Guide*: Refer to this guide for information on using Adobe Sign Services. • *Adobe Sign Services Administrator Guide*: Refer to this guide for information on setting-up Adobe Sign.

This guide describes the following API:

- sendForESignature

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

- Basic Salesforce administration

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- Salesforce and Conga terms and definitions

If you are new to Adobe Sign Services, begin here: About Adobe Sign Services.

DOC ID: ESIGNSPR21RESTAPI20210302

What's New in REST API Guide

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

Document	Topic	Description
Spring '21	All topics	Complete new REST API guide.

Adobe Sign Services REST API

Basics

The Adobe Sign Services API follows a microservice architecture that enables Adobe Sign into any part of an application and is built on the JSON API specification, follows predictable REST URLs, and supports cross-origin resource sharing.

Endpoint

The Adobe Sign Services API is installed with the Adobe Sign managed package and can be exposed to external applications via a Salesforce site or community.

```
https://{testmanaged--clmauto3.my.salesforce.com}/services/apexrest/Apttus_Echosign/echosignIntegration/v1

/agreements/:agreementId/sendForESignature
```

You must replace this path `{testmanaged--clmauto3.my.salesforce.com}` with your Salesforce org path.

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Versions

The Adobe Sign Services API ensures backward compatibility by properly versioning any changes to the APIs. Should changes to the API structure need to be made, it will occur within a new version and older functionality will be preserved.

Content Type

Requests made to the API must be encoded as **JSON** and contain the header

```
Content-Type: application/json
```

Includes

You can easily include resource relationships on most top-level resources. Multiple includes are defined using comma-delimited values.

Caching

Server side caching is used and can be configured per request using the cacheStrategy query parameter.

Errors

Any request that returns an error follows a standard format. The Adobe Sign Services API will return an array of errors that contains objects containing the status, title, and data with the error details.

Code	Response
200	Success
400	Invalid JSON
500	Something went wrong on our end

(Open API documentation is only available to view online)

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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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Community & Learning Center Resources

The Conga Customer Community is your one-stop shop for success!

After registering as a new member you'll gain access to a wide variety of resources, including: further details regarding the onboarding process, access to the knowledge base, and product-specific discussion groups.

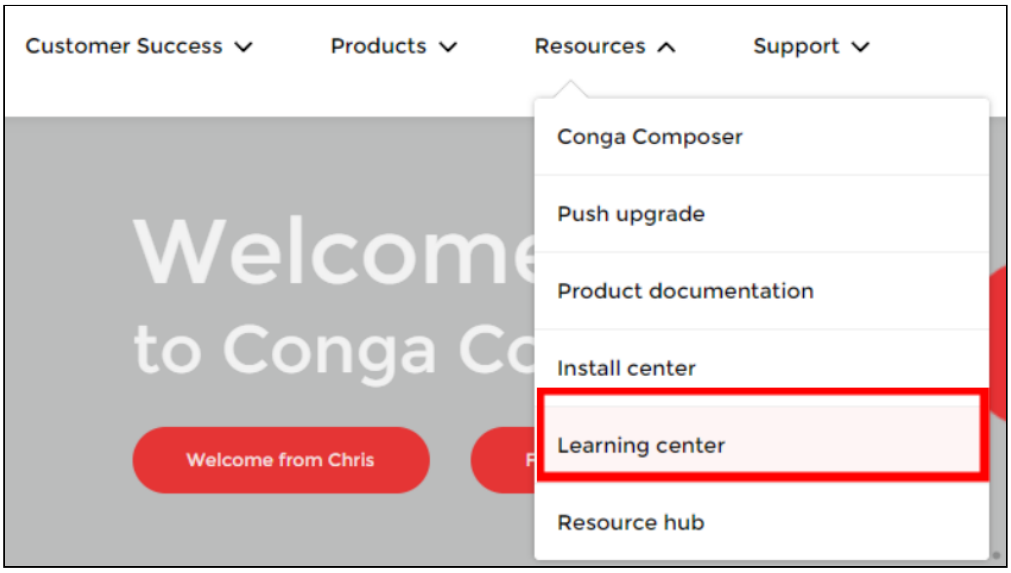
In addition, just a click away from Community is the Conga Learning Center: our comprehensive training portal well stocked with FREE self-paced courses complimented by virtual instructor-led sessions for more advanced and intensive training!

Ready to get started?

First download the Salesforce Authenticator app; you'll need it as part of the login procedure.

Then create a Community account, or log in here!

Once you're logged in, navigate to the Resources dropdown menu and click Learning Center to reach the Conga Learning Center!



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