



# 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.

- [Summer21.07.22 Release Notes](#)
- [Summer21.10.14 Release Notes](#)
- [Summer '21 Release Notes](#)


## Summer21.07.22 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the Adobe Sign Services Summer21.07.22 release. For documentation updates, see [What's New in Adobe Sign Services Documentation](#).


 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 sections. The packages marked as **(New)** are new packages in this release.

 You can register your org for the Conga Push Upgrade. Conga Push Upgrade is an automated tool that upgrades packages available in your Salesforce org (Production or Sandbox) to the latest versions. In addition, it also ensures all the Conga published managed packages are on the latest versions for your registered orgs. For more information, see [Registering for Conga Push Upgrade](#).

Product	Latest Certified Version Name	Latest Certified Version Number
Adobe Sign	23.8	23.8
Conga Base Library	2.1.0203	2.203
Conga Contract Lifecycle Management	12.1.0630	12.630
Conga CLM Adobe Sign Integration <b>(New)</b> (Previously known as Conga CLM EchoSign Integration)	9.1.0066.2	9.66.2
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](#).

## System Requirements and Supported Platforms

For information pertaining to the requirements and recommendations you must consider before you proceed with the installation of the Conga product, see [System Requirements and Supported Platforms Matrix](#).

## New Features

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

## Enhancements

There are no new enhancements in this release.

## Data Model Changes

There are no data model changes in this release.

## Fixed Issues

The following table lists the issue fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
00801414	ESIGN-217	Using Send for Internal Signatures causes an error due to an unsupported API version.

## Known Issues

There are no known issues in this release.

## Summer21.10.14 Release Notes


Release Notes contain the following information about Adobe Sign Services Summer21.10.14 Release (Adobe Sign Services 9.66.1 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 <b>(New)</b>	23.8
Conga Base Library <b>(New)</b>	2.1.0203   2.203
Conga Contract Lifecycle Management <b>(New)</b>	12.1.0630   12.630
Conga CLM Adobe Sign Integration <b>(New)</b> (Previously known as Conga CLM EchoSign Integration)	9.1.0066.1   9.66.1
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.

System Requirements	
Item	Requirement
Operating System	Standard <a href="#">Salesforce.com</a> requirements. See Salesforce <a href="#">PDF</a> .
Browser	<p>Conga supports the following browsers:</p> <ul style="list-style-type: none"> <li>• Microsoft Edge Chromium</li> <li>• Google Chrome</li> </ul> <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 #ffc107; padding: 5px; margin-top: 10px;"> <p> Internet Explorer is not supported.</p> </div>
Adobe Sign System Requirements	See <a href="#">System Requirements for Adobe</a> .

## New Features

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

## Enhancements

There are no new enhancements in this release.

## Data Model Changes

There are no data model changes in this release.

## Fixed Issues

The following table lists the issue fixed in this release. If any actions are required, they will be listed in this table.

Case Number	Conga Internal ID	Description
00772069	ESIGN-201	Agreement Status fields are not being updated if the first Signer is logged in as the User.

## Known Issues


There are no known issues in this release.

## Summer '21 Release Notes

Release Notes contain the following information about Adobe Sign Services Summer '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
- [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.


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 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.

System Requirements	
Item	Requirement
Operating System	Standard <a href="#">Salesforce.com</a> requirements. See <a href="#">Salesforce PDF</a> .
Browser	<p>Conga supports the following browsers:</p> <ul style="list-style-type: none"> <li>• Microsoft Edge Chromium</li> <li>• Google Chrome</li> </ul> <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 <a href="#">System Requirements for Adobe</a> .

## 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 Conga Adobe Sign Services in this release.

### Inactive Templates not Available

Templates that are not marked as **Active** under Files or Notes & Attachments will not appear in the Select Attachments view. This prevents you from accidentally selecting Templates that are not in current use and helps to clear up the Select Attachments screen from clutter.

### Get Started

For details regarding template selection, refer to [Selecting Attachments and Templates](#) in *Conga Adobe Sign Services on Salesforce Summer 2021 User Guide*.

## Clickable links in Template names within Template Selection removed

Templates under the Select Template no longer act as a hyperlink that navigates to the Template record. Previously, you could click the Template name in the Select Template UI and navigate to the Template record in Salesforce.

### Get Started

For details regarding template selection, refer to [Selecting Attachments and Templates](#) in *Conga Adobe Sign Services on Salesforce Summer 2021 User Guide*.

## Data Model Changes

There are no data model changes in this release.

## Resolved Issues

The following table lists the issues resolved in this release.

Case Number	Conga Internal ID	Description
00112662	ESIGN-158	A custom setting Conga-Adobe Settings was introduced that contains a Don't Copy Opportunity flag, which is used to prevent the Opportunity field from being copied to the Adobe Agreement object. Conga-Adobe Settings custom setting allows you to assign this per profile or user individually or as a global default for the organization.
00112586	ESIGN-159	Additional files were attached to the Files/Notes & Attachments related lists after the first Signer signed.

Case Number	Conga Internal ID	Description
00113916	ESIGN-169	You would sometimes receive an error message via email when not using the out-of-the-box Adobe/Echosign <b>Send for eSignature</b> button if Conga CLM Configuration Integration was installed.

## Known Issues

There are no known issues in this release.

# 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.

This guide describes the following tasks:

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

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

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

## 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.
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.

## Summer '21

Document	Publication Date	Topic	Description
Summer '21	 24 Sep 2021	<a href="#">Configuring Adobe Sign Admin Settings</a>	Modified topic. Updated topic to make corrections.
	 29 Jun 2021	<a href="#">Upgrading Adobe Sign Services</a>	Modified topic. Updated the topic as per the latest release.

## Spring '21

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

Document	Topic	Description
	<a href="#">Selecting Attachments and Templates</a>	Modified topic. Updated description and screenshot.

**Winter '20**

Document	Topic	Description
Winter 2020	<a href="#">Selecting Attachments and Templates</a>	Modified topic. Updated screenshots.
	<a href="#">Customizing Action Button</a>	New topic.
	<a href="#">Upgrading Adobe Sign Services</a>	Modified topic. Updated as per the latest release.

# Adobe Sign Services for Administrators

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

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

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.

 The Conga Push Upgrade is an automated tool that upgrades packages available in your Salesforce org (Production or Sandbox) to the latest versions. In addition, it ensures all the Conga published managed packages are on the latest versions for the registered orgs. To register your org for push upgrade, see [Registering for Conga Push Upgrade](#).

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

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

6. Select the profile for which you want to install the package. 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 window, under the **Echosign Integration** section, you will see **Conga CLM Adobe Sign Integration** and **Conga Quote EchoSign Integration**. Click the Details link to access 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](#)
- [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. Under Step 1, click **Sign in to Adobe** and enter your Adobe provided login credentials to sign into your existing Adobe Account. If you need to create a new Adobe account, click **Sign up for a free trial** and follow the instruction on the page.
5. Click **Next**.
6. Under Step 2, choose whether or not to **Enable** or **Disable** the Adobe Sign Automatic Status Updates.
7. Click **Next**
8. You will see that your setup is complete.
9. Click **Done**.

### To add IP ranges

1. Go to **Salesforce Setup > Security Controls > Network Access**.



2. Click **New**. Enter the IP address in the Start and End IP address fields.  
*For the list of suggested IP ranges, see the following [Adobe Sign support article](#) with their recommendations.*
3. Enter the IP range and click **Save**.

## 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.

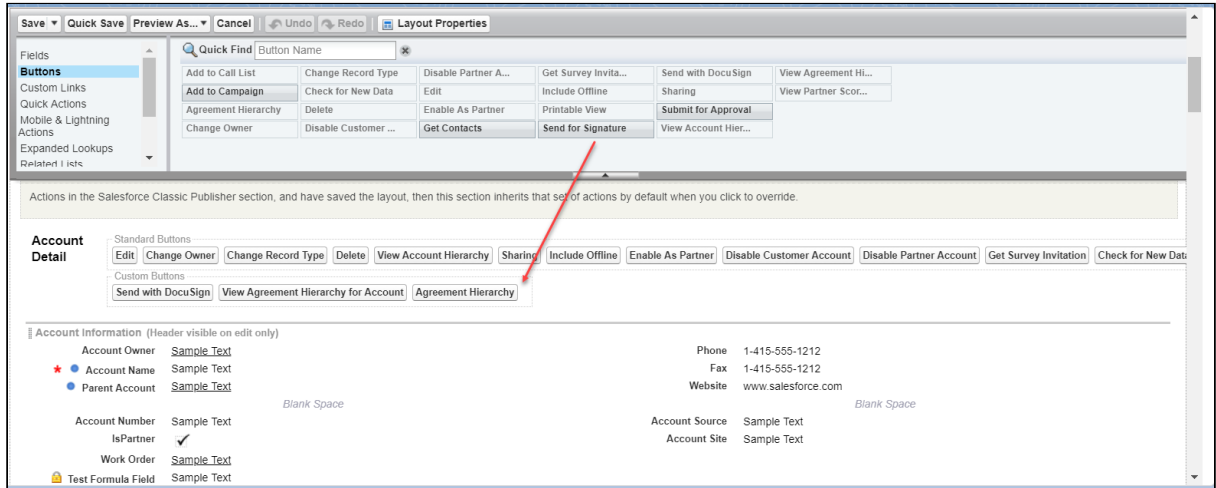
### To add Send for Signature button to page layout

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**.

## 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.

## 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**.

## Conga-Adobe Settings Edit

Provide values for the fields you created. This data is cached with the application.

**Edit Conga-Adobe Settings**
Save Cancel

**Conga-Adobe Settings Information**

Location | Profile ▾ Standard Platform User

Don't Copy Opportunity

## 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**.

i 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
<b>Force Selections</b>	<p>Select this option if you want to force your users to select Attachment(s) and a Template when available while sending a document for eSignature.</p> <p>If checked, the system throws an error if the user does not select attachment(s) and a template, when available.</p> <p>If unchecked, the system does not throw any error, even if the user does not select the template, when available.</p>
<b>Don't Copy Signed Documents</b> (For 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>
<b>Hide Related Agreement Selection</b> (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
<p><b>Update Related Agreements</b> (For Conga CLM)</p>	<p>Select this checkbox if you want to update the Agreement Status of all Related Agreements.</p> <p>If checked the status of Related/Child/Parent/Sibling agreements will be updated if they are selected while sending for eSignature. Also, the signed documents will be returned back to the respective Related/Child/Parent/Sibling agreements.</p> <p>If unchecked, the status of only the Primary Agreement will be updated and signed documents will be returned back to the Primary Agreement only.</p> <p><b>Note:</b> If you select Update Related Agreements checkbox, you must select Don't Copy Signed Documents checkbox to avoid redundant documents through product trigger.</p> <p>If you want to ensure that the signed agreements are returned back to their respective records, you must add custom code in your org. For more information on returning back signed agreements, refer to <a href="#">Selecting Attachments and Templates</a>.</p>
<p><b>Bypass Sharing</b></p>	<p>Select this checkbox to bypass the Org Sharing Settings set for <b>Agreement Template</b> object.</p> <p>If you select this checkbox, all the agreement templates are made available to the logged-in user to select while sending an agreement for eSignature.</p> <p>If you do not select this checkbox, the availability of templates is based on the access setting specified in the Org Sharing Settings for <b>Agreement Template</b> object.</p>

Setup > Build > Develop > Custom Settings > Apttus-Adobe eSignature Properties > System Properties	
Name	Description
Enable Template Filtering	<p>Select this checkbox to filter the templates according to the Agreement Type while sending an agreement for eSignature.</p> <p>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.</p>

## 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.
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.

**i** 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.
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:

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.

- 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.

 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](#).

- ✔ The Conga Push Upgrade is an automated tool that upgrades packages available in your Salesforce org (Production or Sandbox) to the latest versions. In addition, it ensures all the Conga published managed packages are on the latest versions for the registered orgs. To register your org for push upgrade, see [Registering for Conga Push Upgrade](#).

## 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 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 Summer '21

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

1. Go to **Setup > Installed Packages** and ensure that your current Salesforce org has the following Spring '21 packages installed. Also, ensure that you have the following packages and dependent packages to upgrade to Summer '21. These packages are required to utilize the new features and enhancements of Summer '21.

Product	Spring'21 Upgrade Version (Name   Number)	Summer'21 Upgrade Version (Name   Number)
Conga Base Library	2.0.150   2.150	2.0.150   2.150
Conga Contract Lifecycle Management	12.0.0605   12.605	12.0.0605   12.605
Conga Quote Management	11.0.0242   11.242	11.0.0242   11.242
Adobe Sign	22.11	23.8
Conga CLM Adobe Sign Integration <b>(New)</b> (Previously known as Conga CLM EchoSign Integration)	9.0.0056   9.56	9.1.0066   9.66
Conga Quote EchoSign Integration	2.0.0014   2.14	2.0.0014   2.14

2. 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](#).
3. After the upgrade is complete, perform the [Post-Installation Configuration](#) tasks.

### Upgrade Impact for Summer'21

Feature/ Enhancement	Is it a behavior change?	Is it a breaking change?	Is post-upgrade configuration required?	Details
Configuration of Document Storage type, as Document type is no longer a supported storage type.	Yes	No	Yes, need to use "Configuring Document Storage Type" documentation.	You must provide the correct values to the Storage type field on Adobe sign custom setting, as instructed via Configuring Document Storage Type.  We are recommending setting up storage type to get the signed document back to the correct format.
Removal of Conga Sort Screen	Yes	No	No	Removed the intermediary screen to apply sort order of documents, which is now a feature native to Adobe Sign.

## Upgrading Adobe Sign Services from Winter '20 to Summer'21

1. Go to **Setup > Installed Packages** and ensure that your current Salesforce org has the following Winter '20 packages installed. Also, ensure that you have the following packages and dependent packages to upgrade to Summer '21. These packages are required to utilize the new features and enhancements of Summer '21.

Product	Winter'20 Upgrade Version (Name   Number)	Summer'21 Upgrade Version (Name   Number)
Conga Base Library	1.2.123   1.123	2.0.150   2.150
Conga Contract Lifecycle Management	11.2.0582   11.582	12.0.0605   12.605

Product	Winter'20 Upgrade Version (Name   Number)	Summer'21 Upgrade Version (Name   Number)
Conga Quote Management	10.2.0227   10.227	11.0.0242   11.242
Adobe Sign	22.11	23.8
Conga CLM EchoSign Integration	8.2.0049   8.49	9.1.0066   9.66
Conga Quote EchoSign Integration	2.0.0014   2.14	2.0.0014   2.14

2. 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](#).
3. After the upgrade is complete, perform the [Post-Install Configuration](#) tasks.

### Upgrade Impact for Summer'21

Feature/ Enhancement	Is it a behav ior chang e?	Is it a breaking change?	Is post-upgrade configuration required?	Details
Configuration of Document Storage type, as Document type is no longer a supported storage type.	Yes	No	Yes, need to use "Configuring Document Storage Type" documentation.	You must provide the correct values to the Storage type field on Adobe sign custom setting, as instructed via Configuring Document Storage Type.  We are recommending setting up storage type to get the signed document back to the correct format.
Removal of Conga Sort Screen	Yes	No	No	Removed the intermediary screen to apply sort order of documents, which is now a feature native to Adobe Sign.

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




Field Name	Description
Auto Send	<p>Enable this option if you want to automatically send an agreement after you click the <b>Send for Signature</b> button. The preview of the agreement is not displayed.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>i</b> For Auto Send to work, you must have at least one recipient and attachment defined in the agreement template.</p> </div>
<b>Advanced Options</b>	
Agreement Type	<p>Select an agreement type.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>i</b> 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 <b>Enable Template Filtering</b> property in <b>Apttus-Adobe eSignature Properties Custom Settings</b>. For more information on how to configure System Properties, refer to <a href="#">System Properties</a> in the <i>Adobe Sign Services Administrator Guide</i>.</p> </div>
Language	Select the language of the recipients.
Select the signature type for this agreement	<p>Select the default value for the signature type to be collected:</p> <ul style="list-style-type: none"> <li>• <b>E-Signature</b> - Electronic signatures will be collected by default.</li> <li>• <b>Written Signature</b> - Recipients will be instructed to download the document, physically sign it, scan the signed document, and upload that document to Adobe Sign.</li> </ul>

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

Enter the following information, as required.

Field Name	Description
<b>Upload to add a document</b>	Add a file via drag-and-drop from the desktop or upload a file through a menu driven wizard.
<b>Select to add documents</b>	<p>You can search for a document by specific libraries using the Search bar under the radio button options:</p> <ul style="list-style-type: none"> <li>• <b>Salesforce CRM &amp; Files</b> - Your personal library. Any documents you upload from your system are stored in this library for future use.</li> <li>• <b>Salesforce Documents</b> - The Salesforce library that is shared amongst users.</li> <li>• <b>Adobe Sign Library</b> - The library content stored in the Adobe Sign system.</li> </ul>
<b>Advanced Options</b>	

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

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

Field Name	Description
<b>Signing Workflow</b>	<p>Select one of the following option:</p> <ul style="list-style-type: none"> <li>• <b>All Recipients Sign</b> - All of the recipients defined in the template will be required to participate in the process, according to the roles applied to them. This is the setting for all agreements that aren't expected to be signed by the sender only.</li> <li>• <b>Only Sender Signs</b> - Enable this option to add the "Only   Sign" functionality to the template.</li> </ul>
<b>Recipients</b>	<p>Recipients can be added by:</p> <ul style="list-style-type: none"> <li>• <b>Salesforce Object</b></li> <li>• <b>Email</b></li> <li>• <b>Runtime Variable</b></li> </ul>
<b>Message</b>	<p>Enter the message that you want to deliver to the recipients. The Message section imports the <b>Agreement Name</b> from the <b>Template Details</b> tab.</p>
<b>Advanced Options</b>	
<b>Enable Hosted Signature (in-person signature)</b>	<p>Enable to facilitate hosted, in-person signing if the signer is available.</p>
<b>Enable Preview and Position Fields</b>	<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>
<b>Send on Behalf of</b>	<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>
<b>Advanced Verification Methods</b>	<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
<b>Automatic Reminders</b>	Select an option for automatic reminders. The options are <i>Never, Every Day, Until Signed; or Every Week, Until Signed.</i>
<b>Days Until Expiration</b>	Enter the number of days until the signature request expires.
<b>Post Sign Redirect URL</b>	Enter a URL to automatically redirect the signers of an agreement to a specified URL after they sign.
<b>Post Sign Redirect Delay</b>	If the <b>Enable Post Sign Options</b> setting is enabled and a <b>Post Sign Redirect URL</b> is specified, enter the number of seconds that should elapse before executing the redirect.
<b>Password protect the signed document</b>	Enable this option to encrypt the signed PDF that is sent to signers.
<b>Set as default template for all agreements</b>	Enable this option if you want to set this as the Default agreement template for your new agreements.
<b>Enabled as a Chatter Publisher Actions</b>	If you have enabled <b>Chatter Publisher Actions</b> on your Org, then you can check this box to enable this Agreement Template. The Chatter Publisher Action allows you to send agreements from Chatter.

10. Click **Save**.

## Adding the Audit Trail

Audit Trail is a separate document that Adobe provides when generating the final signed document. Once the agreement is signed, a signed copy of the PDF is stored within our application. 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	<a href="https://helpx.adobe.com/content/dam/help/en/sign/Adobe_Sign_Best_Practices_SFDC.PDF">https://helpx.adobe.com/content/dam/help/en/sign/Adobe_Sign_Best_Practices_SFDC.PDF</a>

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

## FAQs

This section contains frequently asked questions. It also provides the solution to frequently occurring errors.

### How do I set up a user?

You can set up a user from the **Adobe Sign Admin Settings** tab.

For more information on setting up a user, refer to [Configuring Adobe Sign Admin Settings](#).

### How do I merge data from Salesforce into my Document Cloud agreements before sending for signature?

You can merge data from Salesforce into your Document Cloud agreements using Merge Mappings.

For more information on Merge Mappings, refer to [Configuring Mappings](#).

### How do I push data from signed Document Cloud agreements back to Salesforce?

You can push data from signed Document Cloud agreements back to Salesforce using Data Mappings.

For more information on Data Mappings, refer to [Configuring Mappings](#).

### 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	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MSA</a>		<a href="#">Miriam Engle</a>	Draft		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MSA</a>		<a href="#">Miriam Engle</a>	Draft		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MSA</a>			Draft		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MSA</a>	8/20/2015	<a href="#">Miriam Engle</a>	Signed	<a href="#">MSA - signed.pdf</a>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MSA</a>	8/26/2015		Signed	<a href="#">MSA - signed.pdf</a>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MSA</a>			Signed	<a href="#">MSA - signed.pdf</a>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MSA</a>			Out for Signature		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MSA</a>			Out for Signature		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MSA</a>			Signed	<a href="#">MSA - signed.pdf</a>	



# Adobe Sign Services for Users

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

Topic	Description
What's Covered	This guide walks the Adobe Sign user through a set-up of the entire e-Signature process. It covers step-by-step instructions, and use cases for the features provided by the Adobe Sign Services.
Primary Audience	Individuals who are working on any aspect of contracts: contract managers, contract creators, contract negotiators, and contract reviewers
IT Environment	Refer to the latest <a href="#">Release Notes</a> for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, refer to <a href="#">What's New in Adobe Sign Services Documentation</a> .
Other Resources	<ul style="list-style-type: none"> <li>• <i>Conga CLM User Guide</i>: Refer to this guide to set-up the entire contract management process.</li> <li>• <i>Adobe Sign Services Administrator Guide</i>: Refer to this guide to set-up the entire Adobe Sign process.</li> <li>• <i>X-Author for Contracts User Guide</i>: Refer to this guide for detailed instructions on setting up templates and editing agreement documents.</li> </ul>

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.

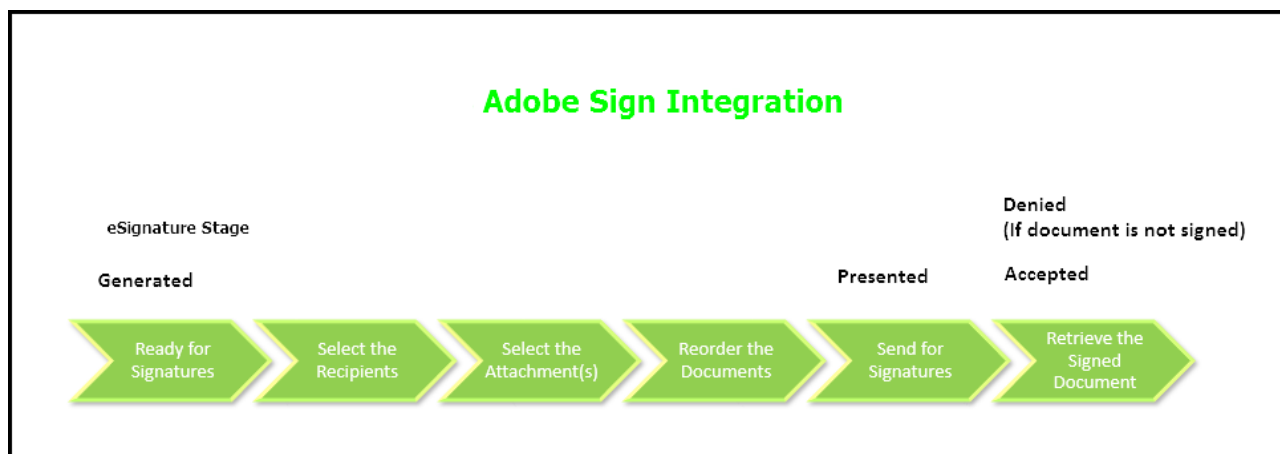
## Proposals and Agreements

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**.

**i** 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 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.

**i** 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-

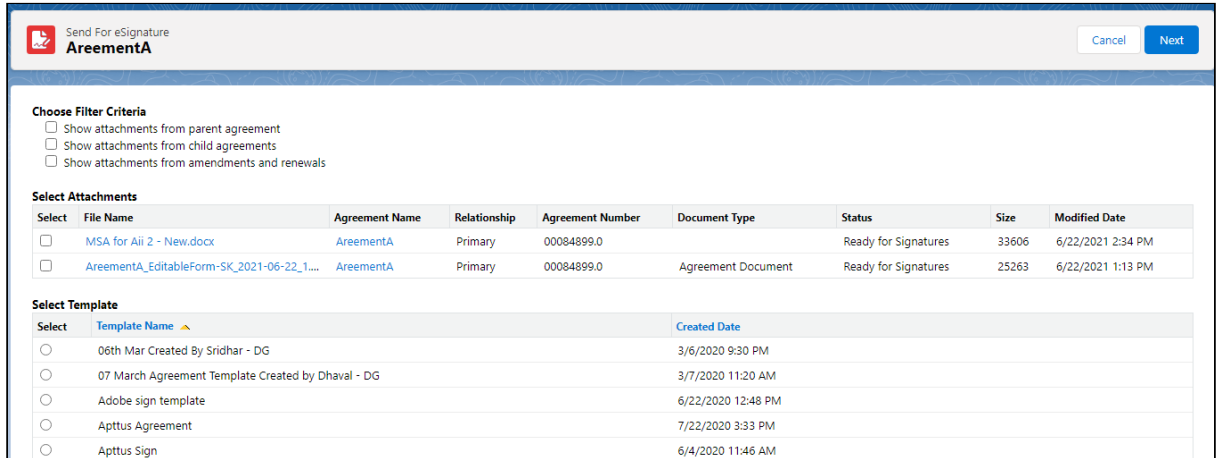
Select the **Show attachments from sibling agreements** checkbox to display the documents, added in Notes & Attachments related list, in the Select Attachments section.

-or-

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

### **i** 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**.

**i** 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.

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

**i** **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.
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.

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



Hide Related Agreement Selection checked?	Don't Copy Signed Documents checked?	Update Related Agreements checked?	Result
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
<b>Contact</b>	Select this option if you want to select an existing contact as a recipient.
<b>User</b>	Select this option if you want to select an existing user as a recipient.
<b>Email</b>	Select this option if you want to enter the email address manually.

Option	Description
<b>Lead</b>	Select this option if you want to enter an existing Lead as a recipient.
<b>Group</b>	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. Choose whether the Recipient is an **Acceptor** or **Signer**.
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** are 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**.

 The Status and Status Category fields will be updated if the Recipients are set as an **Acceptor** or **Signer**.

# 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

Adobe 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 <a href="#">Release Notes</a> for information on System Requirements and Supported Platforms.
Updates	For a comprehensive list of updates to this guide for each release, refer to the <a href="#">What's New</a> topic.
Other Resources	<ul style="list-style-type: none"> <li>• <i>Adobe Sign Services User Guide</i>: Refer to this guide for information on using Adobe Sign Services.</li> <li>• <i>Adobe Sign Services Administrator Guide</i>: Refer to this guide for information on setting-up Adobe Sign.</li> </ul>

This guide describes the following API:

- `sendForESignature`

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

- Basic Salesforce administration
- 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.

## 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)

# 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](#).



# 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.

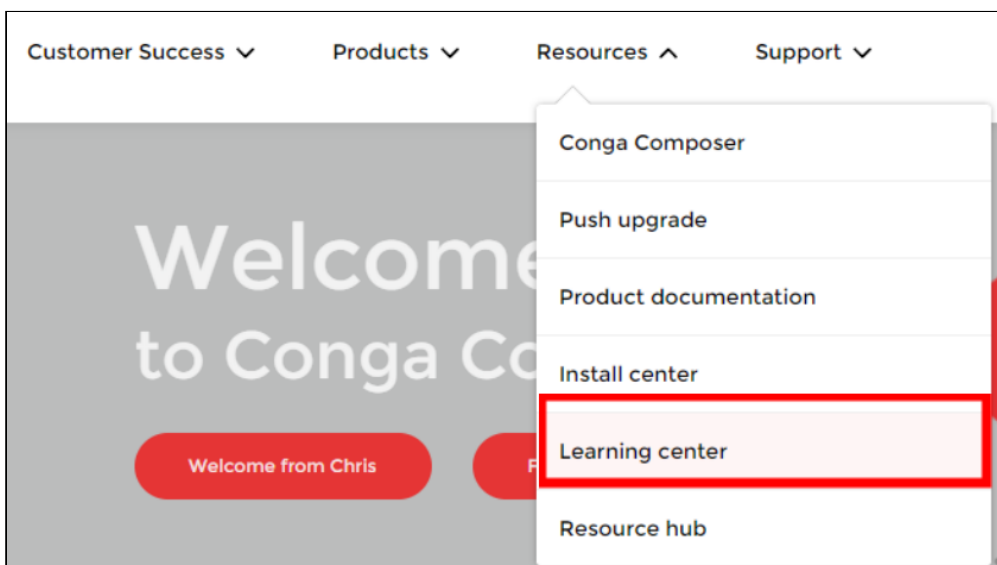
In addition, just a click away from Community is the Conga Learning Center: our comprehensive training portal well stocked with FREE self-paced courses complimented by virtual instructor-led sessions for more advanced and intensive training!

## 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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