



**Conga Sign**



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Quickly and easily send documents for eSignature using a friendly user interface. For more options, consider a seamless integration with the leading document generation application on the AppExchange, Conga Composer.


# Conga Sign Release Notes

Review the latest features delivered in Conga Sign.

- [December '21 Release Notes](#)

## December '21 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the Conga Sign December'21 release. For documentation updates, see [What's New in Conga Sign 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.

To access the learning path, including overviews and demonstrations of this release's updated features and enhancements, visit the [Conga Learning Center](#).

## 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 Certificate Version
Conga Sign <b>(New)</b>	1.76.2

## 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 suite delivered on the Salesforce platform, see [System Requirements and Supported Platforms Matrix](#).



## New Features

The following new features are introduced in this release.

### Sending Transactions on Behalf of other Users

You are able to send a transaction on behalf of another User in your Salesforce organization by setting up the Send On Behalf Of feature using Business Units or Parameters. For more details refer to [Sending Transactions with Send on Behalf Of](#).

### Conga Sign Integration with Conga CLM

Conga Sign can now be integrated with Conga CLM and be sent out for signature using the Actions menu on Agreements, as well as taking advantage of the functions of CLM. For details on setting up the integration with CLM, refer to [Using Conga Sign with Conga CLM](#) and [Sending Transactions from Conga CLM](#).

### Stamp Tag

You are now able to use stamps to sign a document. You are able to upload your own stamps and set a default stamp for your organization. For details on using the stamp image uploader, refer to [Signing a Document](#).

### Signature Image Upload

You are now able to customize your personal signature and initials or upload an image of your personal signature and initials to sign documents. For details on using the stamp image uploader, refer to [Signing a Document](#).

## Enhancements

The following enhancements are new to this release.

### Picklists Added to Write Back Tags

Picklist fields are available to use as Write Back Tags. For more details, refer to [Write Back Tags](#).

## Supported Languages updated with Japanese and Chinese

Japanese and Chinese(Simplified) are available as supported languages with Conga Sign. For more details, refer to [Supported Languages in Conga Sign](#).

## 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
N/A	DCS-4288	When there are multiple signers in a transaction and two signers sign on different days, the signed date of the first signer will show incorrectly to the second signer until signing is complete.
N/A	DCS-4314	When you use the picklist field <b>Billing State/Provence Code</b> as a write-back field, the transaction results in an error "There was an unknown error processing your request" and becomes stuck in the draft state.

## Known Issues

There are no known issues in this release.

## December21.03.09 Hotfix Release Notes

### Conga Sign December21.03.09 Hotfix Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the Conga Sign December21.03.09 Hotfix release. For documentation updates, see [What's New in Conga Sign Documentation](#).

**i** 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.

To access the learning path, including overviews and demonstrations of this release's updated features and enhancements, visit the [Conga Learning Center](#).

#### Packages

The following packages and dependencies are required to upgrade to this release and use its new features. These are the *minimum* required versions; later versions are also supported. Prerequisites for each feature can be found in its documentation. Packages marked as **(New)** are new.

Product	Latest Certificate Version
Conga Sign <b>(New)</b>	1.79.1

#### System Requirements and Supported Platforms

For requirements and recommendations you must consider before you proceed with the installation of the Conga product suite delivered on the Salesforce platform, 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.

#### 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
00789778	DCS-4718	Certain document processing errors are not handled correctly, leading to delays.


#### Known Issues

There are no known issues in this release.

## December21.02.09 Release Notes

### Conga Sign December21.02.09 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the Conga Sign December21.02.09 release. For documentation updates, see [What's New in Conga Sign 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.

To access the learning path, including overviews and demonstrations of this release's updated features and enhancements, visit the [Conga Learning Center](#).

#### Packages

The following packages and dependencies are required to upgrade to this release and use its new features. These are the *minimum* required versions; later versions are also supported. Prerequisites for each feature can be found in its documentation. Packages marked as **(New)** are new.

Product	Latest Certificate Version
Conga Sign <b>(New)</b>	1.79.0

#### System Requirements and Supported Platforms

For requirements and recommendations you must consider before you proceed with the installation of the Conga product suite delivered on the Salesforce platform, 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

The following enhancement is new to this release.

#### New languages added to Conga Sign

In this release, Conga Sign added the following languages to the list of supported languages for use in the Signing User Interface and the Audit Trail. For more details refer to [Supported Languages in Conga Sign](#).

- Korean
- Spanish - Latin America
- Armenian
- Bulgarian
- Bosnian
- British English
- Norwegian
- Slovenian
- Turkish

#### 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
N/A	DCS-4236	When a recipient reassigns a transaction to a new user and the new recipient's email contains a special character, no new recipient is created.


#### Known Issues

There are no known issues in this release.

## December21.01.13 Hotfix Release Notes

### Conga Sign December21.01.13 Hotfix Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the Conga Sign December21.01.13 hotfix release. For documentation updates, see [What's New in Conga Sign 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.

To access the learning path, including overviews and demonstrations of this release's updated features and enhancements, visit the [Conga Learning Center](#).

#### Packages

The following packages and dependencies are required to upgrade to this release and use its new features. These are the *minimum* required versions; later versions are also supported. Prerequisites for each feature can be found in its documentation. Packages marked as **(New)** are new.

Product	Latest Certificate Version
Conga Sign <b>(New)</b>	1.78.1

#### System Requirements and Supported Platforms

For requirements and recommendations you must consider before you proceed with the installation of the Conga product suite delivered on the Salesforce platform, 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.

#### 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
N/A	DCS-4493	When a recipient creates a new signing session after their invitation to sign has expired, the audit trail for new transactions does not render.


#### Known Issues

There are no known issues in this release.

## December21.01.12 Release Notes

### Conga Sign December21.01.12 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the Conga Sign December 21.01.12 release. For documentation updates, see [What's New in Conga Sign 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.

To access the learning path, including overviews and demonstrations of this release's updated features and enhancements, visit the [Conga Learning Center](#).

#### Packages

The following 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. Prerequisites for each feature can be found in its documentation. The packages marked as **(New)** are new.

Product	Latest Certificate Version
Conga Sign <b>(New)</b>	1.78

#### 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 suite delivered on the Salesforce platform, see [System Requirements and Supported Platforms Matrix](#).

#### New Features

The following new features are introduced in this release.

##### SMS Authentication Configuration Parameters

You can parameters to prevent users from disabling SMS Authentication for a recipient in the Create Transaction UI. For more details refer to [Conga Sign Parameters](#).



#### Enhancements

There are no new enhancements 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
N/A	DCS-4345	A Signer who reassigns responsibility to another signer was able to request a new signing link after the original signer link has expired.
N/A	DCS-4465	Send on Behalf of transactions display as Sent, but have failed out silently when the user's language is not set to English.
N/A	DCS-4466	Filling out and then clearing the Send on Behalf of fields in the business unit configuration sets incorrect values in the Create Transaction UI.


#### Known Issues

There are no known issues in this release.

## December21.12.15 Release Notes

### Conga Sign December21.12.15 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the Conga Sign December21.12.15 release. For documentation updates, see [What's New in Conga Sign 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.

To access the learning path, including overviews and demonstrations of this release's updated features and enhancements, visit the [Conga Learning Center](#).

#### 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 Certificate Version
Conga Sign <b>(New)</b>	1.77.2

#### 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 suite delivered on the Salesforce platform, 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.

#### 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
N/A	DCS-4402	Sending transactions to multiple signers using Parallel format intermittently fails to send a signing invitation to all initial recipients. When this occurs, not all signers receive the invitation until the first recipient has completed signing.
N/A	DCS-4416	Selecting the Picklist value of "None" in an optional Picklist tag on desktop results in an error when attempting to write back to Salesforce. This error causes the write back status to be stuck in pending.


#### Known Issues

There are no known issues in this release.

## December21.12.09 Release Notes

### Conga Sign December21.12.09 Release Notes

In these release notes, you can find packages, requirements, features, enhancements, fixed issues, and known issues for the Conga Sign December21.12.09 release. For documentation updates, see [What's New in Conga Sign 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.

To access the learning path, including overviews and demonstrations of this release's updated features and enhancements, visit the [Conga Learning Center](#).

#### 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 Certificate Version
Conga Sign <b>(New)</b>	1.77.0

#### 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 suite delivered on the Salesforce platform, 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.

#### 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
N/A	DCS-4370	Selecting a country in the SMS mobile phone number popup in the Send For Signature page shows a "broken image" icon instead of a small icon displaying the country's flag.

Case Number	Conga Internal ID	Description
N/A	DCS-4394	Picklist checkmarks representing the "None" option are not displayed correctly while signing a document and are not showing the "--" when translated from English to another language.

**Known Issues**

There are no known issues in this release.

## About Conga Sign

Conga Sign is an eSignature application made specifically for Salesforce customers. Users can initiate an eSignature process from any object in Salesforce using pre-defined templates or by adding signature tags in real-time. Then they select up to 10 recipients, set the signing order, and deliver the document to be signed. All signing activity is tracked and updated in Salesforce, the result being a legally valid electronic signature.

To use Conga Sign, administrators must have a Salesforce license to configure Conga Sign and send documents for eSignature. However, recipients do not need a Salesforce license to sign documents sent through Sign. Conga Sign supports Word and PDF file types and allows users to store files in Salesforce. There is also a streamlined integration with Conga Composer, allowing Composer customers to leverage all of the features of Conga Composer with their Conga Sign eSignature processes.

A typical signing process with Conga Sign:

1. Click Send with Conga Sign on the record you're working on.
2. Select or upload a document to sign.
3. Select recipients and signing order.
4. Add tags to the document (if the template does not already have signature tags).
5. Send for Signature or facilitate in-person signing on your device.
6. Recipient(s) sign.
7. Final document is rendered and uploaded back into Salesforce and emailed to all parties.

Conga Sign allows you to perform the following tasks:

- Install and Upgrade Conga Sign from the Salesforce AppExchange.
- Set up and configure Conga Sign on Salesforce objects with Conga Sign Setup.
  - Use the Automatic Configuration in Conga Sign Setup to create the Send with Conga Sign button on specific objects.
  - Customize your Business Unit and Conga Sign emails.
  - Configure basic tags and write back tags.
- Use and integrate Conga Sign with Conga Composer, Conga Contracts for Salesforce, CLM, CPQ, Conga Contracts, and Conga Collaborate.
- Manually create custom Conga Sign buttons or links on specific objects in Salesforce Setup.
- Send Word and PDF files documents for eSignature from Salesforce through email.
  - Pre-tag documents with signature tags, or drag and drop signature tags in the Conga Sign user interface.
  - Create a Conga Sign Transaction when sending a document for eSignature.

- View the Audit Trail to see the history of a Conga Sign Transaction.
- Use SMS Authentication to require signers to enter a one-time passcode delivered through SMS, prior to viewing a Conga Sign document.

The following table lists the tasks that administrators and users can perform using Conga Sign.

Administrator	Administrator/User
<ul style="list-style-type: none"> <li>• Conga Sign Technical Requirements</li> <li>• Installing Conga Sign Package</li> <li>• Post Installation Configuration</li> <li>• License Provisioning Tips</li> <li>• Customizing your Logo</li> <li>• Customizing Emails</li> <li>• Automatically Upload a Conga Sign Document to a Third Party Repository</li> <li>• Using Conga Sign in Salesforce Communities</li> <li>• Using Conga Sign with Conga Composer</li> <li>• Using Conga Sign with Conga Contracts for Salesforce</li> <li>• Setting up a Process Builder for Conga Sign Transaction</li> </ul>	<ul style="list-style-type: none"> <li>• Using Signature and Custom Tags</li> <li>• Creating a Document to Sign</li> <li>• Creating New Recipients in Create Transaction UI</li> <li>• Sending a Document to Sign</li> <li>• Signing a Document</li> <li>• In Person Signing</li> <li>• Canceling a Conga Sign Transaction</li> <li>• Conga Sign Link Expiration</li> <li>• Conga Sign Recipient Object</li> <li>• Reassigning Signers as Recipient</li> <li>• Reassigning Signers from Salesforce</li> <li>• SMS Authentication</li> </ul>

## Key Terminology

It is important to understand how terms are used when working with Conga Sign.

Term	Definition
Email notification	The means by which signers are informed that they have an electronic document to sign. The email notification includes a link that takes the signer directly to the document.
Sender	Users who can create, send and manage Conga Sign document.
Signer	A Conga Sign document recipient who is required to take action on the document.



Term	Definition
Reminders and Expiration	Enables the sender to set the default validity and frequency of an eSignature request.
Tags	Locations in a document where the signer needs to take action and provide information.
In Person Signer	The In Person Signer is the recipient who signs a Conga Sign document in person.
Facilitator	The facilitator is the Salesforce user that creates the In Person Signing Transaction and is responsible for conducting the In person signing.




# What's New in Conga Sign Documentation

This section lists changes in the documentation to support each release.

## December '21

Document	Publication Date	Topic	Description
December '21 Rev A	 10 Nov 2021	<a href="#">Supported Languages in Conga Sign</a>	Updated Topic.
		<a href="#">Audit Trail</a>	Updated Topic.
		<a href="#">Sending Transactions using Send on Behalf Of</a>	New Topic.
December '21	 03 Nov 2021	<a href="#">Signing a Document</a>	Updated Topic.
		<a href="#">List of Conga Sign Signature Tags</a>	Updated Topic.
		<a href="#">Supported Languages in Conga Sign</a>	Updated Topic.
		<a href="#">Write Back Tags</a>	Updated Topic.
		<a href="#">Using Conga Sign with Conga CLM</a>	New Topic.
		<a href="#">Conga Sign-CLM Custom Settings</a>	New Topic.
		<a href="#">Sending Transactions from Conga CLM</a>	New Topic.

## Summer '21

Document	Publication Date	Topic	Description
Summer '21 Rev D	 09 Sep 2021	<a href="#">Supported Languages in Conga Sign</a>	Updated topic.
Summer '21 Rev C	 15 Jul 2021	<a href="#">Remove Reassign Signer</a>	Modified topic. Corrected applied.
Summer '21 Rev B	 13 Jul 2021	<a href="#">Business Units</a>	Modified topic. Removed warning notification.
Summer '21 Rev A	 09 Jun 2021	<a href="#">Attachment Tags</a>	Modified topic. Updated size limitation of documents.
Summer '21 Preview	 07 Jun 2021	<a href="#">Facilitator Notifications</a>	Modified topic. Added content regarding Facilitator email notifications.
		<a href="#">Audit Trail</a>	Modified topic. Added clarification of Signer and CC audit designations.
		<a href="#">Business Units Subject and Email Line</a>	Updated topic.
		<a href="#">Remove Reassign Signer</a>	New topic.
		<a href="#">Conga Sign Parameter</a>	Updated topic. "reassignAllowed" added.
		<a href="#">Configure Email Notification Frequency</a>	New topic.

## Spring '21

Document	Topic	Description
Spring '21 Rev A	<a href="#">Setting for Conga Sign Connected App</a>	Modified topic. Added content about Refresh Token Policy.

Document	Topic	Description
	<a href="#">What's in the Conga Sign Package?</a>	Modified topic. Updated custom object and tabs list.
	<a href="#">Using Conga Sign with Conga Composer</a>	Modified topic. Added a note about sending multiple documents.
	<a href="#">Sending documents for eSignature</a>	Modified topic. Added content about sending multiple documents for eSignature.
	<a href="#">Signing a Document</a>	Modified topic. Added content about signing multiple documents in a single transaction.
Spring '21	<a href="#">Setting Guided Signing</a>	New topic.
	<a href="#">Removing Conga Logo from Signature and Initial</a>	New topic. Added missing feature.
	<a href="#">Configuring Require Drawn Signature Setting</a>	New topic. Added missing feature.
	<a href="#">Signing a Document</a>	Modified topic. Added content about Guided Signing.
	<a href="#">In Person Signing</a>	Modified topic. Added content about Guided Signing.

## Winter '20

Document	Topic	Description
Winter '20	<a href="#">Attachment Tags</a>	New Topic
	<a href="#">List of Conga Sign Signature Tags</a>	Updated Topic
	<a href="#">Audit Trail</a>	Updated Topic
	<a href="#">Business Units</a>	New Topic
	<a href="#">Configuring Business Units</a>	New Topic
	<a href="#">Choosing a Default Business Unit</a>	New Topic
	<a href="#">Customizing Your Logo</a>	Updated Topic
	<a href="#">Customizing Emails</a>	Updated Topic
	<a href="#">Creating New Recipients in Create Transaction UI</a>	New Topic
	<a href="#">Sending Documents for eSignature</a>	Updated Topic
	<a href="#">Conga Sign Parameters</a>	Updated Topic

# Conga Sign for Administrators

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

Topic	Description
What's Covered	Conga Sign Administrator Guide is designed to provide administrators with information on configuring and setting up Conga Sign.
Primary Audience	Contract Manager, Conga 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 Conga Sign Documentation</a> topic.
Other Resources	<ul style="list-style-type: none"> <li>• <i>Conga Sign for Users</i>: Refer to this guide to set-up the entire Conga Sign process.</li> </ul>

Select one of the following topics for more information:

- [Conga Sign Technical Requirements](#)
- [Installing Conga Sign Package](#)
- [Post-Installation Configuration](#)
- [License Provisioning Tips](#)
- [Customizing Your Logo](#)
- [Customizing Emails](#)
- [Conga Sign Parameters](#)
- [Conga Sign Redirect URL](#)
- [Automatically Upload a Conga Sign Document to a Third Party Repository](#)
- [Using Conga Sign in Salesforce Communities](#)
- [Using Conga Sign with Conga CLM](#)
- [Using Conga Sign with Conga Composer](#)
- [Using Conga Sign with Conga Contracts for Salesforce](#)

# Conga Sign Technical Requirements

To install and successfully use Conga Sign, you must have one of the following from each category:

## Salesforce® Edition:


- Performance / Unlimited
- Enterprise
- Developer
- Professional

## Salesforce® Products:

- Sales Cloud
- Service Cloud
- [Force.com](#) / App Cloud
- Health Cloud
- Financial Services Cloud
- Quote-to-Cash

## Internet Browsers (latest version):

- Google Chrome®
- Mozilla Firefox®
  - Mozilla Firefox Settings: to ensure Salesforce works optimally with Firefox, [update the browser's configuration settings](#).
- [Supported Browsers for Salesforce Classic](#): Salesforce Classic is supported with Microsoft® Internet Explorer® version 11 or higher, and Apple® Safari® version 11.x on macOS. The most recent stable versions of Microsoft Edge, Mozilla® Firefox®, and Google Chrome™ are also supported. There are some limitations.
- [Supported Browsers for Salesforce Lightning Experience](#): See the supported browsers and limitations for Lightning Experience.

 Conga Sign does not support Salesforce Lightning in Microsoft® Internet Explorer® version 11. Some Conga Sign functions may continue to work, but it is highly recommended to use a different browser or to use Salesforce Classic when using Microsoft® Internet Explorer® version 11. If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates.

## Best Practice Guidelines

For the best experience and security, [follow these guidelines](#).

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that do not support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation has already occurred in sandbox orgs and concludes with production orgs on July 22, 2017.
- Some features use iframes to work in Lightning Experience, so you must have the appropriate browser security settings for iframes to load correctly. Follow your browser's instructions to enable working with iframes and third-party cookies. For example: In Internet Explorer, set the Launching programs and files in an IFRAME security setting to Enable or Prompt. In Safari, we recommend changing your privacy settings for cookies to Allow from websites I visit. In Chrome, make sure that Block third-party cookies and site data isn't selected in the Content settings.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Chrome, make sure the system setting Show scroll bars is set to \ Always.
- Some third-party browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the browser's plug-ins and extensions and try again.

## Template Software

- Microsoft Office® 2016 (Mac or PC)
- Adobe Acrobat® XI, Acrobat Reader

 Adobe LiveCycle PDFs are not supported.

## Mobile

- Compatible with Salesforce1 and all mobile browsers when configured following the documentation.

## SMS Authentication Feature

To use the SMS Authentication feature, Conga Sign users must have a minimum of read access to the fields below on the Contact, Lead, and User objects.

- **Contact:** MobilePhone and MailingCountry
- **Lead:** MobilePhone and Country
- **User:** MobilePhone and Country

## Installing Conga Sign Package

You can install the Conga Sign package into your Salesforce instance from Salesforce AppExchange.

## To install Conga Sign

1. Go to [Salesforce AppExchange](#).
2. Click **Get It Now** and follow the on-screen prompts to install Conga Sign.
3. Log in to the AppExchange. You must provide System Administrator credentials to install an application from the AppExchange.
4. Specify where you want to install Conga Sign:
  - Click **Install in Production** to install in your production instance.
  - Click **Install in a Sandbox** to install in a sandbox.
5. Read and accept the terms and conditions.
  - Select the I have read and agree to the terms and conditions box.
  - Click **Confirm and Install**.

As a best practice, and to avoid access issues for end users, Conga recommends selecting Install for All Users.

6. Click **Install**.
7. Approve Third-Party Access for all 3 websites selected.
  - Check **Yes**, grant access to these third-party websites.
  - Click **Continue**.



8. Click **Done**. If the package takes too long to install, you will receive an email letting you know when it is done.
9. After clicking Done, you will be on the Installed Packages page in Salesforce Setup. Click on **Manage Licenses** next to the Conga Sign managed package link.
10. Administrators are assigned a license by default. Continue [assigning licenses](#) to other users who need access to Conga Sign.

✓ Conga Sign document recipients do not need a Conga Sign license. Only users who will be preparing documents to send for signatures need a license.

After assigning licenses, you must [Configuring Conga Sign](#) for use in your organization.

## Post-Installation Configuration

After installing the Conga Sign package, you must configure the following Conga Sign Admin Settings.


- [Configuring Conga Sign](#)
- [Permissions Needed to Use Conga Sign](#)
- [Settings for Conga Sign Connected App](#)
- [Conga Sign Email Change](#)
- [What's in the Conga Sign package?](#)
- [Adding Sign Button and Transactions Related List to Page Layout](#)
- [Adding Conga Sign Button to a Page Layout Manually](#)
- [Configuring an Object for Conga Sign Manually](#)
- [Creating a Conga Sign button Manually](#)
- [Business Units](#)
- [Setting Final Document Delivery Options](#)
- [Setting Guided Signing](#)
- [Adding Reassign Signer Button](#)
- [Remove Reassign Signer](#)
- [Removing Conga Logo from Signature and Initial](#)
- [Configuring Require Drawn Signature Setting](#)

## Configuring Conga Sign

The Conga Sign configuration process involves running the Automatic Configuration from the Conga Sign Setup tab and modifying the page layout of the object in which you're utilizing Conga Sign.


### 1. Select a **Conga Sign Processing Region**.

- Navigate to the **Conga Sign Setup** tab.
- In **Conga Sign Processing Region** section, select a specific region to connect to for data processing and storage related to Conga Sign. Generally, Conga suggests selecting the same region as your Salesforce org or your primary business location.

 This selection is permanent and is only available in orgs without existing region connections. Existing connections cannot be modified.



### 2. **Connect with OAuth**.

- After selecting a Conga Sign Processing Region, click **Connect** in the **Connect with OAuth** section.

 We recommend using an Integration User account to complete this step (an account that no one uses normally). The person completing this step is the person under whose authority data from Conga Sign syncs with your Salesforce org.

- Click **Allow**.

### 3. Run the **Automatic Configuration** tool.

- Modifying the object's page layout to include the Send with Conga Sign button and add the Conga Sign Transactions related list.
- Click **Start Automatic Configuration** under **Organization Configuration**.
- Select the object(s) you want to utilize with Conga Sign (limit 10 per run. If you need to add more than 10 objects, you can run Automatic Configuration again).
- Click  icon to add an object(s).
- Click **Next**.
- Select the profiles permitted to use Conga Sign (limit 5 per run. If you need to add more than 5 profiles, you can run Automatic Configuration again).
- Click  icon to add profile(s).
- Click **Save**.

You see a green checkbox in the Organization Configuration box when Automatic Configuration is complete. See [Adding a Sign button to the page layout for next steps](#).


## Connecting to Conga Sign with OAuth

Conga Sign integrates with your Salesforce org using the login credentials of a user of your choice. This integration is done through an [OAuth connection](#). The specific user connecting

with OAuth should have the [necessary permissions for Conga Sign](#) and sufficient permissions to modify records in Salesforce.

## To connect to Conga Sign with OAuth

1. Log in to Salesforce as the designated user.
2. Click the **Conga Sign Setup** tab.
3. Click **Connect** in the **Connect with OAuth** section.

 You must select a Conga Sign Processing Region before clicking Connect to connect with OAuth.

4. Click **Allow**.

After successfully connecting, the Status field will display as "Connected" and show the specific Conga Sign Processing region your Salesforce org is connected to.

## Permissions Needed to Use Conga Sign


### Connected Service User

- Package License granted
- Read access to objects used with (for example, Opportunity)
- Read/Write access to Conga Sign Transaction [APXT\_CongaSign\_\_Transaction\_\_c] and all fields
  - Including any setup generated lookup fields (e.g Opportunity [Parent\_006\_\_c])
- Read/Write access to Conga Sign Document [APXT\_CongaSign\_Document\_c] and all fields
- Read/Write access to Conga Sign Recipient [APXT\_CongaSign\_\_Recipient\_\_c] and all fields
- Permission to Apex Classes: APXT\_CongaSign\_\_apxt\_setup
- Permission to VF pages: APXT\_CongaSign\_\_apxt\_setup
- Permission on the User Record: Salesforce CRM Content User is enabled
- Profile Permission → Administrative Permissions → Manage Salesforce CRM Content is enabled

### Regular Users

- Package License granted

- Read access to objects used with (for example, Opportunity)
- Read access to Conga Sign Transaction [APXT\_CongaSign\_\_Transaction\_\_c] and all fields
  - Including any setup generated lookup fields (e.g Opportunity [Parent\_006\_\_c])

 To allow non-admin users to cancel Conga Sign Transactions that they are not the record owner of, you must provide them both Read and Edit Access to the Conga Sign Transaction object

- Read/Write access to Conga Sign Document [APXT\_CongaSign\_Document\_c] and all fields
- Read access to Conga Sign Recipient [APXT\_CongaSign\_\_Recipient\_\_c] and all fields

## Permission to Apex Classes

- APXT\_CongaSign\_\_apxt\_cancelTransaction
- APXT\_CongaSign\_\_apxt\_contentInfo
- APXT\_CongaSign\_\_apxt\_resendTransaction
- APXT\_CongaSign\_\_apxt\_sendForSignature
- APXT\_CongaSign\_\_apxt\_serviceRedirect
- APXT\_CongaSign\_\_apxt\_setup


## Permission to VF pages

- APXT\_CongaSign\_\_apxt\_auditTransaction
- APXT\_CongaSign\_\_apxt\_cancelTransaction
- APXT\_CongaSign\_\_apxt\_contentInfo
- APXT\_CongaSign\_\_apxt\_editTransaction
- APXT\_CongaSign\_\_apxt\_resendTransaction
- APXT\_CongaSign\_\_apxt\_sendForSignature
- APXT\_CongaSign\_\_apxt\_serviceRedirect
- APXT\_CongaSign\_\_apxt\_setup

## Permission on the User Record

- Salesforce CRM Content User is enabled
- Profile Permission → Administrative Permissions
  - Manage Salesforce CRM Content is enabled


## Settings for Conga Sign Connected App

 It is highly recommended to configure the IP Relaxation and Refresh Token Policy settings for the Conga Sign Connected App, as mentioned in this article.


Relax IP Restrictions in the Conga Sign Connected App by March 31, 2020, to avoid delayed or failed delivery of Conga Sign documents and transactions back to your Salesforce org. Adjusting the Relax IP Restriction setting for Conga Sign ensures that seamless updates to Conga Sign are delivered in the future.

### To configure Conga Sign Connected App

1. Navigate to **Setup** in Salesforce.
2. Type Connected Apps in the Quick Find search box.
3. Click **Manage Connected Apps**.
4. Click **Conga Sign**.
5. Click **Edit Policies**.
6. Set the IP Relaxation field's value from **Enforce IP restrictions** to **Relax IP restrictions**.

 If the IP Relaxation is set to Enforce IP restrictions, Conga Sign may not be able to connect to the org as the Conga Sign IP address used to connect is not always the same.

7. Set the Refresh Token Policy field's value to **Refresh token is valid until revoked**.

 If the Refresh Token Policy is set to another policy, Conga Sign may be disconnected when the refresh token expires.

8. Click **Save**.

Click [here](#) to watch a video on how to update Conga Sign IP address settings.

## Conga Sign Email Change

The Conga Team has migrated Conga Sign services to a new infrastructure on July 8, 2020. As a result of this change, IP addresses used or referenced to whitelist Conga Sign emails are no longer supported.

Conga has taken the necessary steps to ensure that all emails originating from the Conga Sign service are valid. Additionally, Conga has protections in place to prevent spam and spoofing attempts, which makes whitelisting Conga Sign emails mostly unnecessary.

Instead of whitelisting specific Conga IP addresses, it is highly recommended to use DKIM and SPF validation in your inbound email server software, if it is not already enabled. Also consider adding the domain "conga-sign.com" to an allow list in your email server configuration, instead of using a dedicated IP address.

## What's in the Conga Sign package?

### Buttons

- Conga Sign Setup
- View Audit
- Download Original Version
- View File
- Edit Draft
- Cancel Transaction
- Download Final Version

### Custom Objects

- Conga Sign Transaction
- Conga Sign Document
- Conga Sign Settings
- Conga Sign Recipient

### Page Layout

- Transaction Layout
- Recipient Layout

### Custom Tabs

- Conga Sign Transaction

- Conga Sign Setup
- Conga Sign Recipients

## Adding Sign Button and Transactions Related List to Page Layout

### To add button and related list to the object's page layout

1. Navigate to the **Object Manager** in Salesforce **Setup**.
2. Click on the object where you configured Conga Sign.
3. Click **Page Layouts**.
4. Click **[Object] Layout**.
5. Click **Buttons > Send with Conga Sign** and drag onto the page's Custom Buttons section.
6. Click **Mobile & Lightning Actions > Send with Conga Sign** and drag onto the page's Salesforce Mobile and Lightning Experience Actions section.
7. Click **Related Lists > Conga Sign Transactions** and drag to the page's Related Lists section.
8. Click **Save**.
9. OPTIONAL: The Conga Sign Transactions Related Listed defaults to recommended columns. If you want to customize the columns:
  - Click the wrench icon to access the related list properties.
  - Add desired fields to the Related List and arrange them in the preferred order.
  - OPTIONAL: Sort by descending for newest on top.
  - Click Ok.
10. Save the page layout.

The Conga Sign configuration process involves running the Automatic Configuration from the Conga Sign Setup tab and modifying the page layout of the object in which you're utilizing the Conga Sign.

## Adding Conga Sign Button to a Page Layout Manually

### To add a Conga Sign button or link to a page layout in the Lightning UI

1. Navigate to **Setup > Objects and Fields > Object Manager > [Object] > Page Layouts** and select the page layout. The Page Layout Properties screen appears.
2. Click **Buttons** or **Custom Links**.
3. Drag and drop your new button to the Custom Button area on the page layout.
4. Click **Save**.

### To add a Conga Sign button or link to a page layout in the Classic UI

1. Navigate to **Setup > Customize > [Object] > Page Layouts** and select **Edit** next to the desired page layout. The Page Layout Properties screen appears.
2. Click **Buttons** or **Custom Links**.
3. Drag and drop your new button to the **Custom Button** area on the page layout.
4. Click **Save**.

## Configuring an Object for Conga Sign Manually

Use the Automatic Configuration in Conga Sign Setup to configure objects for Conga Sign.

#### Prerequisites:

- [Install Conga Sign from the Salesforce AppExchange](#)
- [Connect to OAuth in Conga Sign Setup](#).

As an alternative to using the [Start Automatic Configuration feature in Conga Sign Setup](#), you can also manually set up a Salesforce object for Conga Sign.



## To manually configure a Salesforce object for Conga Sign

1. Find the 3-digit prefix of the object you are configuring for Conga Sign. For a list of standard object 3-digit prefixes, see [Standard Field Record ID Prefix Decoder](#). You can also find the 3-digit object prefix by navigating to an object record in Classic and copying the first 3 digits of the full record ID.
2. Navigate to **Setup** in Salesforce.
3. Toggle open Create and select Custom Objects.
4. Click **Conga Sign Transaction**.
5. Under Custom **Fields and Relationships**, click **New**.
6. Choose **Lookup Relationship** and click the **Next** button.
7. Select the object that you are configuring for Conga Sign and click Next.
8. Use the Field Label that Salesforce automatically generates. Change the **Field Name** to Parent\_[3-digit object prefix] and click **Next**. Example Field Name for custom object: Parent\_a5G
9. Choose the desired assignments for Field Level Security, Page Layouts, and the Related List.
10. Click **Save**.
11. Create a button. For more information see: [Manually create a Conga Sign Button](#)

## To manually configure an object for Conga Sign in lightning

1. Find the 3-digit prefix of the object you are configuring for Conga Sign. For a list of standard object 3-digit prefixes, see [Standard Field Record ID Prefix Decoder](#). You can also find the 3-digit object prefix by navigating to an object record in Classic and copying the first 3 digits of the full record ID.
2. Navigate to **Setup** in Salesforce.
3. Under the Platform Tools section, toggle open Objects and Fields and select **Object Manager**.
4. Select and access the object that you are configuring for Conga Sign.
5. Select **Fields and Relationships** and click the **New** button.
6. Choose **Lookup Relationship** and click the **Next** button.
7. Select the object that you are configuring for Conga Sign and click Next.
8. Use the Field Label that Salesforce automatically generates. Change the **Field Name** to Parent\_[3-digit object prefix] and click **Next**. Example Field Name: Parent\_a5G

9. Choose the desired assignments for Field Level Security, Page Layouts, and the Related List.
10. Click **Save**.
11. Create a button. For more information see: [Manually create a Conga Sign Button](#).

## Creating a Conga Sign button Manually

Several buttons are necessary when using Contracts with Salesforce CPQ. This page describes how to create and place them.

### To create a Conga Sign button

1. Navigate to **Setup > Object Manager** tab.
2. Select the appropriate Object.
3. Click **Buttons, Links, and Actions**.
4. Click **New Button or Link**.
5. Enter the following information:
  - **Label:** Send for Conga Sign
  - **Display Type:** Detail Page Button
  - **Behavior:** Display in a new window
  - **Button or Link URL:** /apex/APXT\_CongaSign\_\_apxt\_sendForSignature?id={!Object.Id}

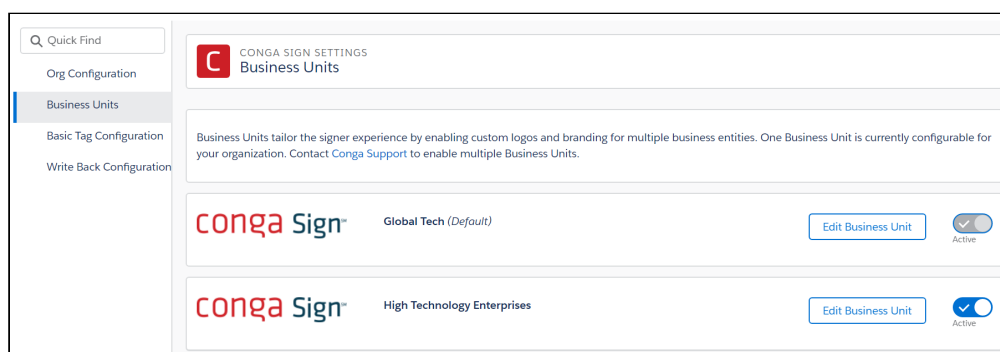
### To add Buttons to the selected Object

1. In Salesforce Lightning, navigate to the Object layout page where you selected the Object on the **Object Manager** tab.
2. Click the **Page Layout** name. The edit screen opens.
3. Click **Buttons**.
4. Drag your Conga Sign button to the Custom buttons area.
5. Click **Mobile & Lightning Actions**.
6. Drag your Conga Sign button to the Salesforce Mobile and Lightning Experience Actions area.
7. Click **Save**.

# Business Units

Business Units allow administrators to configure branding in Conga Sign Transactions and emails for specific organizations, departments, and entities within a Salesforce org. Conga Sign users can use the default Business Unit, or select a different Business Unit, for each Conga Sign Transaction to include specific branding for the signing experience.

Business Units are located and configured in the Business Units section of Conga Sign Setup.



Business Units allow administrators to configure the following fields:

- **Business Unit Name** - defines the Business Unit name
  - The Business Unit Name is displayed in the Business Unit picklist on the Create Transaction user interface and is also displayed in the Audit Trail.
- **Business Unit API Name** - used to specify a Business Unit with the [Conga Sign businessUnit parameter](#) and the *Composer CSBusinessUnit parameter* topic in *Composer Parameter Guide*.
  - The Business Unit API name can only contain underscores and alphanumeric characters. It must be unique for the org, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
- **Business Unit Status** - determines if a Business Unit is activated and available for use in Conga Sign Transactions and emails.
- **Company Logo** - displays the selected logo in Conga Sign emails and documents.
- **Email From Display Name** - defines the company name displayed on Conga Sign emails.
- **Email Subject** - defines the subject field in emails sent from Conga Sign.
- **Email Message** - defines the content displayed in the body of emails sent from Conga Sign.
- **Contact Information fields** - defines the contact information displayed at the bottom of emails sent from Conga Sign.
  - Company
  - Address, City, State, Zip/Postal Code, Country

- Phone Number
- Website

With the multiple Business Units feature enabled, Conga Sign users can easily select a specific Business Unit to use for each Conga Sign Transaction under the Advanced Options section in the Create Transaction user interface.

Advanced Options

MESSAGE

Please update the Subject and Message below for a custom message.

Subject

Message

Choose Business Unit

Business Unit

Global Tech Inc

The default Business Unit auto-populates as the selected Business Unit in each Conga Sign Transaction. For more information about choosing a default Business Unit, see [Choosing a Default Business Unit](#).

Conga Sign Transaction

CS-000000


Status	Write Back Status	Business Unit	Created On	Completed On
SENT	NONE	Conga America	7/10/2020, 8:17 AM	

Related Details

Information


Transaction Name	CS-000000	Status	SENT
Sender Name	User User	Write Back Status	NONE
Sender Email	sally.sales@conga.com	Created On	7/10/2020, 8:17 AM
Business Unit	Conga America	Completed On	


Each Salesforce org is entitled to one Business Unit. After configuring the initial Business Unit, it is then selected as the default Business Unit and used for all Conga Sign Transactions. Users can change the default Business Unit to a different Business Unit if the multiple Business Units feature is enabled.

 Information previously stored in the Email Configuration section of Conga Sign Setup is automatically carried over and applied to an org's default Business Unit in orgs that had a version of Conga Sign preceding version 1.49.0. The Company Logo is also moved from the Org Configuration section and carried over to the default Business Unit.

A default Business Unit is automatically created and enabled if any of the following criteria were met in Salesforce orgs that had a version preceding Conga Sign version 1.49.0:

- A Company Logo was previously uploaded in the Org Configuration section of Conga Sign Setup
- Any field in the Email Configuration section of Conga Sign setup was previously filled out
- The Require Drawn Signature setting in the Org Configuration section of Conga Sign Setup is enabled
- The Hide Signature Logo setting in the Org Configuration section of Conga Sign Setup enabled

 Orgs with new installations of Conga Sign version 1.49.0 will not have a default Business Unit automatically created.

 The Company Logo, Email Configuration fields, Require Drawn Signature setting and Hide Signature Logo setting are moved to the Business Units section of Conga Sign Setup.


If none of the criteria above are met, you must configure and enable a Business Unit in a Conga Sign Setup. If no Business Unit is configured, Conga Sign will apply its default Conga Sign branding for all Conga Sign Transactions. For information about configuring Business Units, see [Configuring Business Units](#).

## Configuring Business Units


Configure Business Units in Conga Sign Setup to enable custom branding for specific organizations, departments, and entities within your org.

### To configure Business Units

1. Navigate to **Conga Sign Setup**.
2. Click **Business Units**.
3. Click **Edit Business Unit** next to a specific Business Unit.

 Administrators only have access to the default Business Unit unless the multiple Business Units feature is enabled.

4. Modify the existing values in the **Business Unit Name** and **Business Unit API Name** fields or enter new field values.


 The Business Unit Name is displayed in the Business Unit picklist on the Create Transaction user interface and is also displayed in the Audit Trail. The Business Unit API Name is used to specify a Business Unit with the [businessUnit Conga Sign parameter](#) and the *CSBusinessUnit Composer parameter* topic in *Composer Parameter Guide*. The Business Unit API Name can only contain underscores and alphanumeric characters. It must be unique for the org, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

5. Click Upload Files to upload a new Company Logo for the Business Unit.
6. Configure email branding for the Business Unit by modifying the values of the following fields.
  - a. Email Display Name
  - b. Subject
  - c. Message

 Information previously stored in the Email Configuration section of Conga Sign Setup is automatically carried over and applied to an org's default Business Unit in orgs that had a version of Conga Sign preceding version 1.49.0. The Company Logo is also moved from the Org Configuration section and carried over to the default Business Unit.


7. Configure the contact information for the Business Unit by entering values in the following fields.
  - a. Company
  - b. Address
  - c. City, State, and Zip/Postal Code
  - d. Country
  - e. Phone Number
  - f. Website
8. Click Save.
9. Enable the Business Unit.
  - If you are configuring the default Business Unit, it is enabled by default and no further action is required.

- If you are configuring a Business Unit that is not the default Business Unit, click the Set Status toggle to change the value from Inactive to Active.

 Default Business Units are set to active by default. You must activate non-default Business Units to use them in Conga Sign Transactions and emails.

Orgs with the multiple Business Units feature enabled can also choose a new default Business Unit. For information on choosing a default Business Units, see [Choosing a Default Business Unit](#).


## Choosing a Default Business Unit

 Choosing a default Business Unit requires the multiple Business Units feature. To enable the multiple Business Units feature, [contact Conga Support](#). Without the multiple Business Units features enabled, users only have access to modify the singular default Business Unit.

The default Business Unit auto-populates as the selected Business Units for all Conga Sign Transactions and emails. Users also have the option to select a different Business Unit in the Create Transaction user interface if the multiple Business Units feature is enabled. Additionally, administrators can use the [businessUnit parameter](#) in a native Conga Sign button, or the *CSBusinessUnit* topic in Composer parameter in a Conga Sign-integrated Composer solution, to automatically populate a specific Business Unit in new Conga Sign Transactions.

A default Business Unit is automatically created and enabled if any of the following criteria were met in Salesforce orgs that had a version preceding Conga Sign version 1.49.0:

- A Company Logo was previously uploaded in the Org Configuration section of Conga Sign Setup
- Any field in the Email Configuration section of Conga Sign setup was previously filled out
- The Require Drawn Signature setting in the Org Configuration section of Conga Sign Setup is enabled
- The Hide Signature Logo setting in the Org Configuration section of Conga Sign Setup enabled

 Orgs with new installations of Conga Sign version 1.49.0 will not have a default Business Unit automatically created.

## To set a default Business Unit

1. Navigate to **Conga Sign Setup**.
2. Click **Business Units**.
3. Click **Edit Business Unit** next to a Business Unit record.
4. Click the **Set as Default** toggle to change the value from Disabled to Enabled.
5. Click **Change the Default**.

The Business Unit is now selected as the default Business Unit and auto-populates as the selected Business Unit in the Create Transaction user interface.

## Sender Email Notification Frequency

Configure Email Notification frequency to control how frequently your notifications are sent.

### To configure notification frequency

1. Navigate to **Conga Sign Setup**.
2. Click on **Business Unit**.
3. Select **Email Notification Frequency** and check the boxes for each value you want to enable/disable. The following are the options available.
  - **Transaction is Complete** - When enabled, sends email notification when Transaction has been completed by all Signers.
  - **Transaction is Cancelled** - When enabled, sends email notification when Transaction has been canceled by the Signer or the Sender.
  - **Transaction is Expired** - When enabled, sends email notification when Transaction has reached its marked expiration date.
  - **Transaction is Sent** - When enabled, sends email notification when Transaction has been sent out for signature.
  - **Transaction is Reassigned** - When enabled, sends email notification when the recipient has chosen to reassign the signer.
  - **Transaction is completed by Signer** - When enabled, sends email notification when each Signer has completed signing.
  - **Transaction is viewed by Signer** - Two sub-options for this feature:
    - **Document view first time only** - When enabled, sends email notification only when the received document is viewed for the first time.
    - **Document view every time** - When enabled, sends email notification every time the received document is viewed by a recipient.



# Setting Final Document Delivery Options


Conga Sign allows you to choose how completed documents are delivered to recipients. Navigate to **Conga Sign Setup** and select one of the options described below. The selected method applies to all Conga Sign Transactions created moving forward.

## Final Document Delivery Options

Administrators can choose from the following three final document delivery methods in the Final Document Delivery section of Conga Sign Setup:

- **PDF Attachment**

- The final document delivered as a PDF attachment in an email.


 This is the default final document delivery method for Conga Sign Transactions.

- **Download Link**

- The final document is downloadable through a download link delivered in an email.
- Upon clicking the **View Document** button in the initial email, users then click the **Download Document** button to download the final document as a PDF file.
- The download link delivery option supports final documents with a file size of up to 50MB.
- The download link expires five days from when it is delivered in an email. Recipients can simply click the Send new link button in the expired download link window to request a new download link.

- **Attachment and Link**

- The final document is attached as a PDF file in an email and is also downloadable as a PDF file through a download link.
- All information from the options above applies to the Attachment and Link option.

 Final documents greater than 10MB are only accessible through a downloadable link, regardless of the selected delivery option.

## Setting Guided Signing

This feature allows signers to navigate to the locations of each assigned Conga Sign tag in the document while signing. By default, the Guided Signing setting is disabled. You can enable the Guided Signing setting from Conga Sign Setup.

### To enable guided signing

1. Go to [Conga Sign Setup](#).
2. Navigate to the **Guided Signing** section.
3. By default, the Guided Signing setting is disabled. Click the toggle for **Guided Signing** to enable it.

The Guided Signing is enabled and when signing, signers can use the navigation button to auto-navigate to the locations of each assigned tag in a Conga Sign document. When the signers are ready to sign, they can click Begin button that navigates them to the first tag needing their attention. Once completing the first tag, they can click to Next button to navigate to the next tag in the document. For more information on how to use Guided Signing, refer to [Signing a Document](#).

## Adding Reassign Signer Button

Conga Sign offers users in Salesforce the option to reassign a signer's designated signature responsibilities to a different recipient after the Conga Transaction is sent. Reassigning signers is useful in scenarios where a Conga Sign user wants to designate signature responsibilities to a different person within their Salesforce org.

### To add reassign signer button

1. Navigate to **Conga Sign Setup** and click **Reconnect** to ensure the Salesforce org is connected to OAuth.
2. Click **Start Automatic Configuration** in Conga Sign Setup and complete the Automatic Configuration process.
3. Add the **Reassign** button to the **Recipient** object page layout.
  - Navigate to **Salesforce Setup**.
  - Use the Quick Find search box to navigate to Object Manager in Lightning, or Objects under the Create section in Classic.

- Select the **Conga Sign Recipient** object.
- Click **Page Layouts** and select the page layout in use.
- Click **Buttons** in the page layout menu.
- Drag and drop the **Reassign Signer** button into the **Custom Buttons** section of the page layout and click **Save**.

## Remove Reassign Signer

Remove Reassign Signer is an optional setting that allows Administrators to enable or disable the Reassign Signer option. Reassign Signer allows a recipient to reassign the Conga Sign Transaction to a different recipient. Disabling this setting prevents signers from reassigning.

## To setup reassign signer

1. Navigate to **Conga Sign Setup** and go to **Org Configuration**.
2. Under **Reassign the Signer**, modify the toggles to enable/disable Reassign Signer from either the organization level or transaction level respectively.

**Reassign the Signer**  
 Reassign the Signer allows signers to reassign the Conga Sign Transaction to another recipient. Disabling this setting will prevent signers from any reassignment.


☐ Disabled

Allow users to modify reassign settings on individual transactions.


☐ Don't Allow

Enabled per Organization	Enabled per Transaction	Result
Enabled	Disabled	Reassign is not available on the Create Transaction screen but is available on the received email.
Enabled	Enabled	Reassign is available on the Create Transaction screen and is also available on the received email.

Enabled per Organization	Enabled per Transaction	Result
Disabled	Disabled	Reassign is disabled for the organization and not available on the received email.

 If Reassign Signers is disabled for the entire Organization, it prevents recipients from reassigning from individual transactions.

## Removing Conga Logo from Signature and Initial


 This feature is currently available by request only. To enable **Remove Conga Logo From Signatures and Initials** setting in Conga Sign Setup, contact [Conga Support](#).

Conga Sign allows you to remove the Conga logo from signature and initial tags in Conga Sign documents. You can enable this setting while configuring Business Units in Conga Sign Setup.

### To remove Conga logo from signature and initial

1. Navigate to **Conga Sign Setup**.
2. Click the **Business Units** tab.
3. Click **Edit Business Unit** next to a specific Business Unit.
4. Goto **Remove Conga Logo From Signature and Initial** section.
5. By default, the setting is disabled. Click the toggle for **Remove Conga Logo From Signature and Initial** to enable it.

## Configuring Require Drawn Signature Setting

 This feature is currently available by request only. To enable the **Require Drawn Signature** setting in Conga Sign Setup, contact [Conga Support](#).

You can enable the Require Drawn Signature setting to require Signers to draw a signature, instead of selecting one of the default signature styles. This is a global setting that applies

to all Conga Sign Transactions. You can enable this setting while configuring Business Units in Conga Sign Setup.

## To configure Require Drawn Signature setting

1. Navigate to **Conga Sign Setup**.
2. Click the **Business Units** tab.
3. Click **Edit Business Unit** next to a specific Business Unit.
4. Go to **Require Drawn Signature** section.
5. By default, the setting is disabled. Click the toggle for **Require Drawn Signature** to enable it.

## License Provisioning Tips

### My sandbox license has expired, how do I extend it?

- You can submit a case to have your sandbox co-termed with your subscription. If you are a Conga Communities User, then please submit the case through [Conga Communities](#).
- It is a best practice to submit cases when you refresh your sandboxes, as all refreshes come with 30-day trials.

### Why does my Sandbox have an expiration countdown, but my production org doesn't?

- All Sandbox Orgs are provisioned as trial licenses. Your production org is provisioned per your subscription term and only displays the expiration date 14 days prior to expiration.
- You can always submit a case to have your sandbox co-termed with your subscription.

## I don't see "manage licenses" in my sandbox as I do in production, why?

- We do not enable License Management in sandboxes unless you ask specifically. Therefore, you have an unlimited Site License in all sandboxes. This means that you do not have to assign a Salesforce user a license for Composer.
- If you would like this enabled, please keep in mind you need to enable all the users you would like to have access. You can submit a case on the support page and request LMA be turned on.

## How do I assign users licenses?

- Please click here for instructions: [Assigning User Licenses for Conga Sign](#).

## I just renewed, but I am still seeing an expiration warning.

- If you have signed your renewal order form, and your expiration warning is less than 2 weeks away, please submit a case.

## Does the Conga use License Keys?

- Conga does not use license keys. All new installs for Conga Sign, Contracts, Conga Grid will be assigned with 5 Trial licenses for 15 days.
- All products can be downloaded via the Salesforce AppExchange. Exceptions to this are Conga Collaborate and Conga Contracts (off the platform), and Contracts for Salesforce.
- Here is a link to the [Conga Installation Links](#).
- Conga Collaborate, Conga Contracts, and Contracts for Salesforce will be installed by your Conga Professional Services team member as part of your Professional Services engagement. (If this does not apply to you, then please contact your Conga account representative.

## Assigning User Licenses for Conga Sign

When installing Conga Sign from the AppExchange, the default license count upon installation is 10, one of which is assigned to the administrator who installed the Conga Sign. Conga Provisioning then updates your license count to match the amount that you have purchased within 1-3 business days.

 It is recommended to use Salesforce Classic to assign licenses.


## To assign the remaining licenses for Conga Sign

1. Navigate to the **Installed Packages** in Salesforce **Setup**.
2. Click **Manage Licenses** next to **Conga Composer**.
3. Click **Add Users**.
4. Select the box to the left of the names of the users who need access to the Conga Sign.
5. Click **Add** to add the selected users.
6. Click **Add Users** to save changes.

Remember to email [onboarding@conga.com](mailto:onboarding@conga.com) when you have installed (if you have not done so already) to ensure the fastest provisioning of any additional licenses.

## Customizing Your Logo

- Ensure the image is a supported file type: PNG or JPG
- The image must be 40 x 40 pixels for a square image and 180 x 40 pixels for a rectangle image.

 Logos are uploaded to individual Business Units. If multiple Business Units are enabled for an org, users can select from multiple Business Units in the Create Transaction user interface. For more information on Business Units, see [Business Units](#).

## To add a logo

1. Navigate to **Conga Sign Setup** and click **Business Units**.
2. Click **Edit Business Unit** next to a specific Business Unit.

3. Click **Upload Files**.
4. Locate and upload the logo file. Ensure that the file is the correct file type and size.

**CONGA SIGN SETTINGS**  
Business Units > Edit Business Unit

Go Back Cancel Save

**Business Unit Name**  
Set the Business Unit Display Name and API Name for your Business Unit. [Tell Me More](#)

\* Business Unit Name:  
Conga Sign

\* Business Unit API Name:  
Conga\_Sign

**Business Unit Status**  
You cannot delete a business unit, as it could be used on existing transactions. Deactivate this business unit to no longer use it on future transactions. [Tell Me More](#)

Set as Default Disabled

Set Status Inactive


**Company Logo**  
The supported file formats are PNG and JPG. The recommended size for square logos is 40px by 40px. The recommended size for rectangle logos is 180px by 40px.

Upload Files Or drop files

**conga Sign**

## Customizing Emails

Customize and brand your company email templates to provide a professional business experience to the recipients. Additionally, you can customize the body text of emails sent to the recipient when you send a transaction.

 Email customization is done for individual Business Units. If multiple Business Units are enabled for an org, users can select from multiple Business Units in the Create Transaction user interface. For more information on Business Units, see [Business Units](#).


If you need a document to be signed, the email the signer receives can have a specified text. Additional details are added to the Sent Email body so your users can more easily identify and confirm information associated with the transaction. The email body is defined. The document name is bolded and includes a list of recipients to whom the transaction email is sent.

## To customize emails


1. Navigate to **Conga Sign Setup** and click **Business Units**.
2. Click **Edit Business Unit** next to a specific Business Unit.
3. Enter values in the following fields to customize your Conga Sign emails:
  - a. Email Display Name
  - b. Subject
  - c. Message



- d. Company
- e. Address
- f. City, State, and Zip/Postal Code
- g. Country
- h. Phone Number
- i. Website

 It is not required to enter values for all email configuration and contact fields in a Business Unit. For more information on customizing email fields for a Business Unit, see [Configuring Business Units](#).

4. Click **Save**.

 Both the original Signer and Requester receive Re-assigned Requester email notifications. Error messages were updated to explain to users who attempt to re-assign Signer after previous successful re-assignment. The error message states: This document has already been re-assigned to a new Signer. Each Signer can only re-assign to a new Signer once.

## Conga Sign Parameters

The native Send with Conga Sign button's behavior and functionality is customizable with Conga Sign parameters.

There is a separate set of integration parameters when using Conga Sign with Composer. For more information, see [Conga Sign Integration Parameters](#). Also, note that parameters are case sensitive.

## Parameters

- authRequired
  - Allows Administrators to control whether their Users can disable SMS Authentication in the Create Transaction UI.
  - When enabled, Senders are unable to change the Authentication Type for a signer to "Standard", the "Standard" option will not be available in the Auth dropdown. Senders can still modify a signer's phone number by clicking the authentication dropdown and selecting the SMS option.
  - The following prerequisite parameters are required for this parameter:
    - &recipient[1-10]
    - &recipientrole[1-10]

&recipientlanguage[1-10]  
&recipientauth[1-10]=SMS  
&recipientmobile[1-10]

**Example**

authRequired= **true**

## . businessUnit

- A string that defines a specific Business Unit to select for a Conga Sign Transaction.
- The parameter value must be the API name of one active Business Unit. You can use this parameter once in a transaction to designate a singular Business Unit.

**Example**

businessUnit=Global\_Tech\_Inc

## . documentId

- A ContentDocument ID that automatically selects a document on the screen.
- The Id referenced here can be a document that is attached to the parent object, or attached to a different object.
- Intended for individual document Ids only, not to be used in conjunction with documentIds. Buttons that contain both documentId and documentIds will result in error.

**Example**

&documentId=0696A000005bXNn

## . documentIds

- A selection of document Ids that automatically selects multiple documents on the screen.
- The Ids referenced here can be documents that are attached to the parent object, or attached to different objects.
- This parameter **must** be used independently of the documentId parameter. Buttons that contain both documentId and documentIds will result in error.
- Defined Ids must be comma-delimited.
- Documents will appear in the Create Transaction screen in the order of the Ids applied to the parameter from left to right.

### Example

```
&documentIds=0696A000005bXNn,0531A001005bDcS
```

## . emailMessage

- A string with a limit of 50000 characters.
- Add parameter email message (string, max length 50000) that defaults the message field in the email section of the Conga Sign user interface.

### Example

```
&emailMessage=Please+sign+ this +document.
```

## . expireOn

- A string for a datetime in UTC format.
- It can be used with a merge field if wrapped in a TEXT() function.
- Add parameter expires (ISO8601 date) that default the transaction expires field in the notification section.

### Example

```
&expireOn={!TEXT(Object.DateTime)}
```

**Example**

```
&expireOn= 2019 - 07 -10T14: 00 : 00 .000Z
```

## . expireReminder

- A string for a datetime in UTC format.
- Add parameter expirationReminder (ISO8601 date) that defaults the expiration reminder in the notification section.

**Example**

```
&expireReminder= 2019 - 07 -10T14: 30 : 00 .000Z
```

## . emailSubject

- A string with a limit of 1000 characters.
- Add parameter emailSubject (string, max length 1000) that defaults the subject field in the email section.

**Example**

```
&emailSubject=Document+ for +Signature
```

## . reminderDays

- A number which is a positive integer.
- Add parameter reminder (integer) that defaults the request reminder field in the notification section.

**Example**

```
&reminderDays= 3
```

## . id

- A string of a 15 digit or 18 digit Salesforce record id.
- Determines the master object id for a Conga Sign transaction.

### Example

```
&id=006f400000RTyAN
```

## . reassignAllowed

- Allows the recipient of a Conga Sign transaction to reassign the signer of the transaction.

### Example

```
&reassignAllowed= true
```

## . recipient[1-10]

- A string for a Contact, Lead, or User Salesforce Id.
- Recipients 1 through 10 to assign to the transaction. If any recipients are skipped the resulting list is squashed - i.e. if only recipients 3 and 5 are set they show up as 1 and 2 in the UI.

### Example

```
&recipient1={!Opportunity.ContactId__c}&recipient2=0036A000000033p4
```

## . recipient[1-10]auth

- A string for a Contact, Lead or User Salesforce Id; SMS is the only available value
- Assigns SMS authorization to a recipient.
- If the recipient[1-10]mobile parameter is not designated for a recipient, Conga Sign automatically uses the mobile number on the recipient's Salesforce record (Contact, User, or Lead) to send the SMS authorization to. The Mailing Country

field on the record must be configured with 2 character ISO 3166-1 alpha-2 country code (example: US Mobile number: 3038675309, country code: US).

#### Example

```
&recipient1={!Opportunity.ContactId__c}
&recipient1Auth=SMSNote: SMS Authentication is currently available
for Early Adopters only. To become an Early Adopter, contact your
designated Customer Success Manager or Conga Support.
```

## . recipient[1-10]curl

- A string to determine a website that recipients can chose to be taken to after successfully completing signing.
- With this parameter, recipients can click Continue after completing signing and are taken to the URL defined with the recipient[1-10]curl parameter.
- If the recipient is a standard SIGNER and clicks Continue after completing signing, they are taken to the URL in the same browser tab. If the recipient is an IN\_PERSON\_SIGNER and clicks Continue after completing signing, they are taken to the URL in a new browser tab.
- The format of the URL must start with either http:// or https://. The www. portion of a URL is optional.

#### Example

```
recipient[ 1 - 10 ]curl parameter values:
http: //www.conga.com
http: //conga.com
https: //www.conga.com
https: //conga.com
```

## . recipient[1-10]email

- A string to determine the email address necessary to create and add a new Conga Sign Recipient to a transaction.

- This parameter also requires the **recipient[1-10]first** and **recipient[1-10]last** parameters, or the **recipient[1-10]name** parameter, to successfully create and add new Conga Sign Recipients.

✓ Use the **recipient[1-10]name** parameter to define a new Conga Sign Recipient's full name, as opposed to using **recipient[1-10]first** and **recipient[1-10]last** to define first and last name separately. You cannot use **recipient[1-10]name** with **recipient[1-10]first** and **recipient[1-10]last** to define a new Conga Sign Recipient's name.

- The parameter value must have the following email address format:  
`<username>@<domain>.com`
- The **recipient[1-10]email**, **recipient[1-10]first**, **recipient[1-10]last**, and **recipient[1-10]name** parameters are used to specifically create a new Conga Sign Recipient that does not already exist as a Contact, User, or Lead record in Salesforce.
- Creating and adding a new Conga Sign Recipient to a transaction does not create a Contact, Lead, or User record in Salesforce. It creates a Conga Sign Recipient (custom object) record specific to that transaction only. New Conga Sign Recipients created with Conga Sign parameters cannot be added or re-used in other transactions.

✓ Use the **recipient[1-10]** parameter to add existing Contact, Leads, and Users as Conga Sign Recipients, instead of creating new Conga Sign Recipients.

## • recipient[1-10]first

- A string to determine the first name necessary to create and add a new Conga Sign Recipient to a transaction.
- This parameter also requires the **recipient[1-10]last** and **recipient[1-10]email** parameters to successfully create and add a new Conga Sign Recipient.
- The **recipient[1-10]email**, **recipient[1-10]first**, **recipient[1-10]last**, and **recipient[1-10]name** parameters are used to specifically create a new Conga Sign Recipient that does not already exist as a Contact, User, or Lead record in Salesforce.

✓ Use the **recipient[1-10]** parameter to add existing Contact, Leads, and Users as Conga Sign Recipients, instead of creating new Conga Sign Recipients.

- Creating and adding a new Conga Sign Recipient to a transaction does not create a Contact, Lead, or User record in Salesforce. It creates a Conga Sign Recipient (custom object) record specific to that transaction only. New Conga Sign Recipients created with Conga Sign parameters cannot be added or re-used in other transactions.

## . recipient[1-10]language

- A string for a Contact, Lead or User Salesforce Id; either de, fr, en-US, es, pt-PT, pt-BR, it, el, nl-NL, hr, pl, uk, ro, ka, ru or sh
- Assigns a language to a specific recipient.
- The following languages are supported:
  - German: de
  - French: fr
  - English (US): en-US
  - Portuguese (Portugal): pt-PT
  - Portuguese (Brazil): pt-BR
  - Italian: it
  - Greek: el
  - Dutch: nl-NL
  - Croatian - hr
  - Polish - pl
  - Ukrainian - uk
  - Romanian - ro
  - Georgian - ka
  - Russian - ru
  - Serbian - sh

### Example

```
&recipient1={!Opportunity.ContactId__c}&recipient1language=fr
```

## . recipient[1-10]last

- A string to determine the last name necessary to create and add a new Conga Sign Recipient to a transaction.



- This parameter also requires the **recipient[1-10]first** parameter and **recipient[1-10]email** parameters to successfully create and add a new Conga Sign Recipient.
- The **recipient[1-10]email**, **recipient[1-10]first**, **recipient[1-10]last**, and **recipient[1-10]name** parameters are used to specifically create a new Conga Sign Recipient that does not already exist as a Contact, User, or Lead record in Salesforce.

✓ Use the **recipient[1-10]** parameter to add existing Contact, Leads, and Users as Conga Sign Recipients, instead of creating new Conga Sign Recipients.

- Creating and adding a new Conga Sign Recipient to a transaction does not create a Contact, Lead, or User record in Salesforce. It creates a Conga Sign Recipient (custom object) record specific to that transaction only. New Conga Sign Recipients created with Conga Sign parameters cannot be added or re-used in other transactions.

## • recipient[1-10]name

- A string to determine the full name (both first and last name) necessary to create and add a new Conga Sign Recipient to a transaction.

⚠ Use a space or + symbol to separate the first and last name for this parameter value.

- This parameter requires the **recipient[1-10]email** parameter to successfully create and add a new Conga Sign Recipient.

✓ Use the **recipient[1-10]name** parameter to define a new Conga Sign Recipient's full name, as opposed to using **recipient[1-10]first** and **recipient[1-10]last** to define first and last name separately. You cannot use **recipient[1-10]name** with **recipient[1-10]first** and **recipient[1-10]last** to define a new Conga Sign Recipient's name.

- The **recipient[1-10]email**, **recipient[1-10]name**, **recipient[1-10]first**, and **recipient[1-10]last** parameters are used to specifically create a new Conga Sign Recipient that does not already exist as a Contact, User, or Lead record in Salesforce.

- ✓ Use the recipient[1-10] parameter to add existing Contact, Leads, and Users as Conga Sign Recipients, instead of creating new Conga Sign Recipients.

- Creating and adding a new Conga Sign Recipient to a transaction does not create a Contact, Lead, or User record in Salesforce. It creates a Conga Sign Recipient (custom object) record specific to that transaction only. New Conga Sign Recipients created with Conga Sign parameters cannot be added or re-used in other transactions.

## • recipient[1-10]role

- A string for a Contact, Lead or User Salesforce Id; either IN\_PERSON\_SIGNER, SIGNER, or CC
- Assigns a role to a specific recipient.

### Example

```
&recipient1={!Opportunity.ContactId__c}&recipient1role=SIGNER
```

## • routingType

- A string for routing type; either PARALLEL or SERIAL
- If set to PARALLEL, all recipients are routed at the same level (default behavior). If set to SERIAL, recipients are routed based upon their defined routing order. Example: CSRecipient1, CSRecipient2, CSRecipient3.

### Example

```
&routingType=SERIAL
```

## • recipient[1-10]mobile

- A string for a Contact, Lead, or User Salesforce Id that assigns a mobile number to a specific recipient for SMS Authentication.

- The string must be all numeric and include the country code (example: US mobile number: 13038675309).
- If the recipient[1-10]mobile parameter is not designated for a recipient, Conga Sign automatically uses the mobile number on the recipient's Salesforce record (Contact, User, or Lead) to send the SMS authorization to. There are two acceptable format options for phone numbers in the Mobile field.
  - i. Full E.164 format, which includes the '+' and the country code (ex: US mobile number: +13036669999)
  - ii. The mobile number does not include the '+' and country code, but the Mailing Country in the Address Information section for the recipient is configured with the 2 character ISO 3166-1 alpha-2 country code. (ex: US mobile number: 3035171753, country code: US).
- Requires recipient to have the recipient[1-10]auth=SMS parameter.

#### Example

```
&recipient1={!Opportunity.ContactId__c}
&recipient1Auth=SMS&recipient1Mobile= 13038675309
```

## • senderReturnUrl

- A string to determine a page that the sender is returned to after successfully sending a transaction.
- Add senderReturnUrl = http/https site or relative url.
- By using the below example, you are redirected to the Conga Support website after successfully sending a transaction.

#### Example

```
{!URLFOR($Site.Prefix)}/apex/
APXT_CongaSign__apxt_sendForSignature?id={!Opportunity.Id}
&senderReturnUrl=https: //support.conga.com
```

- By using the below example, you are redirected to the Account record associated with the Opportunity record after successfully sending a transaction.

**Example**

```
{!URLFOR($Site.Prefix)}/apex/
APXT_CongaSign__apxt_sendForSignature?id={!Opportunity.Id}
&senderReturnUrl={!Opportunity.AccountId}
```

## . sendonbehalfofname

- A string to identify the Name of the intended recipient you are sending a transaction on behalf of.

**Example**

```
&sendonbehalfofname=First+Last
```

## . sendonbehalfofemail

- A string to identify the Email of the intended recipient you are sending a transaction on behalf of.

**Example**

```
&sendonbehalfofemail=fLast @conga .com
```

## . syncDocsToParent

- A string to integrate with Conga CLM, allows you to determine if you would like the documents in a transaction to be synced to the record the button was launched from.
- When syncDocsToParent is set to false, the original and final documents will only be synced to the transaction record in Salesforce.
- Signer attachments will only sync back to the transaction record in Salesforce.

**Example**

```
&syncDocsToParent= false
```

## . syncFinalDocAsNewContentDoc

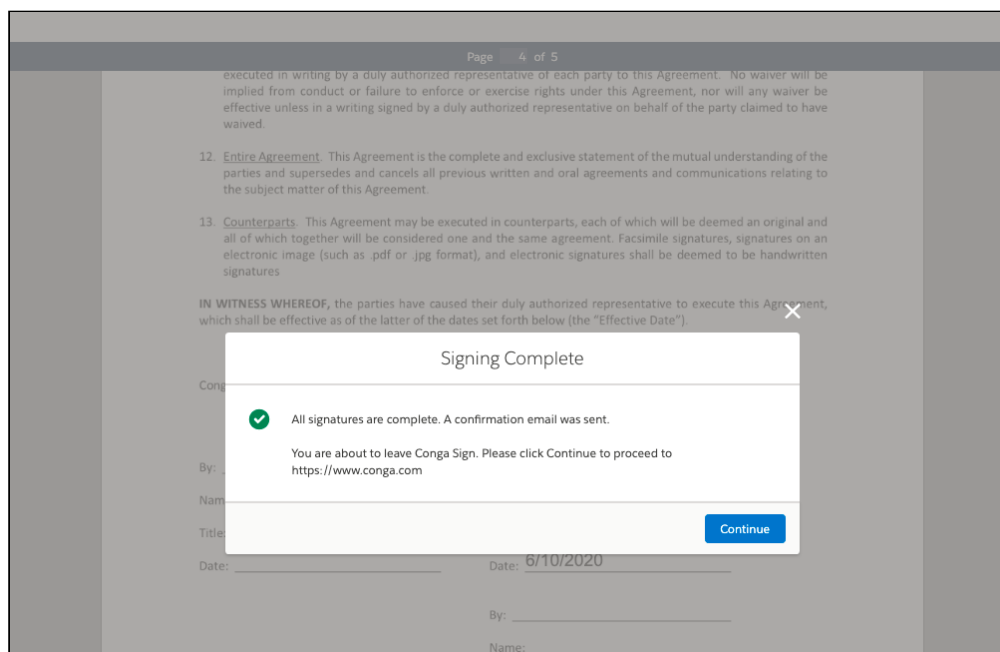
- A string to integrate with Conga CLM, allows you to determine if you would like the final document to come as a separate content document.
- The Final Documents Sync Status field will be populated with a note of SUCCESS once the final documents are written back into Salesforce if the parameter is set to true.

**Example**

```
&syncFinalDocAsNewContentDoc= true
```

## Conga Sign Redirect URL


The Conga Sign Redirect URL allows Conga Sign users to define a URL that signers can click and access after successfully completing their portion of a Conga Sign document. Upon successfully signing a Conga Sign document, signers can simply click Continue and Conga Sign redirects the signer to the defined URL.



## Defining a Conga Sign Redirect URL

A Conga Sign Redirect URL is defined with a specific parameter and parameter value for each signer.

In a native Conga Sign button, the Conga Sign Redirect URL is defined with the [recipient\[1-10\]curl](#) Conga Sign parameter. In a Conga Sign-integrated Composer solution, the Conga Sign Redirect URL is defined with the [CScurl\[1-10\]](#) Composer parameter.

 A Conga Sign Redirect URL must be defined with the aforementioned parameters. There is no option in the Conga Sign user interface to add or designate a Conga Sign Redirect URL.

Both a Conga Sign button and Conga Sign-integrated Composer solution can have up to 10 Conga Sign Redirect URLs specified for signers. Each signer assigned a Conga Sign Redirect URL must have the role of SIGNER or IN\_PERSON\_SIGNER.

The format of a URL specified as a Conga Sign Redirect URL must start with either [http://](#) or [https://](#). The [www.](#) portion of a URL is optional.

Example of acceptable Conga Sign Redirect URL parameter values:

- [http://www.conga.com](#)
- [http://conga.com](#)
- [https://www.conga.com](#)
- [https://conga.com](#)

## Automatically Upload a Conga Sign Document to a Third Party Repository

Automatically upload a completed Conga Sign document to a third-party repository, such as Box and SharePoint, using a folder-specific upload email address. Users can also simply add the upload email address Contact as the final signer with a CC role manually when creating and sending a Conga Sign Transaction.

## To automatically upload a completed Conga Sign document to an online repository

1. Create a **Conga Sign-integrated Composer** button.
2. Create a **Contact** record in Salesforce and use a repository folder's upload email address as the standard Email field's value. Example:

Contact Detail		Edit	Delete	Clone
Contact Owner	Walker Llewellyn <a href="#">[Change]</a>	Phone		
Name	Upload Email Address	Home Phone		
Talent Name		Mobile		
Title		Other Phone		
Department		Fax		
Birthdate		Email <b>complet.w814jep7zhqc4i0s@u.box.com</b>		

3. Add the **&CSRoutingType=Serial** parameter to the **Composer** button. Serial routing is required for this solution.
4. Add a new recipient to the **Composer** button using the **CSRecipient** parameter. Use the record ID of the new upload email address Contact record as the parameter value.

The upload email address Contact must be designated as the last Conga Sign recipient.

5. Add the **CSRole** parameter to designate a CC signer role to the upload email address Contact. Example:

Button or Link URL
<pre> /apex/APXTConga4__Conga_Composer ?serverUrl={!API.Partner_Server_URL_370} &amp;id={!Opportunity.Id} &amp;TemplateID=a0Cf400000HF27S &amp;Qvar0Id=a04f4000009gDSJ &amp;CSVisible=1 &amp;CSRoutingType=SERIAL &amp;CSEExpiration={!Opportunity.csexpiration__c} &amp;CSEExpirationReminder={!Opportunity.csexpirationreminder__c} &amp;CSRoutingType=Serial &amp;CSRecipient1={!Opportunity.OwnerId} &amp;CSRecipient2={Qvar0} <b>&amp;CSRecipient3=003f400000tJ26Y</b> <b>&amp;CSRole3=CC</b> </pre>

Following the steps above, the upload email address automatically populates as CC signer role when launching a Conga Sign-integrated Composer button.

**Add Recipients**  
You must select an existing Contact, Lead, or User. Email addresses are not allowed.

Search by Name or Account

☒ Signing Order \* Drag and drop recipients to define signing order.

	NAME	EMAIL	COMPANY	TITLE	ROLE	
≡	Walker Llewellyn	walkerllewellyn@gmail.com	Innitech Music Solutions		Signer	×
≡	John Doe	walker.llewellyn@getconga.com	Burlington Textiles Corp of America		Signer	×
	Upload Email Address	complet.w814jep7zhgc4j0s@u.box.com			CC	×

The document is then uploaded to the third-party repository once the final signer completes their assigned portion of the Conga document.

## Using Conga Sign in Salesforce Communities

Use a native Conga Sign button in a Salesforce Community to allow Community users to send documents for signature. Additionally, administrators can setup a Conga Sign-integrated Composer button or a Conga Sign-integrated Trigger solution in a Salesforce Community to generate and send documents for e-signature.

**i** Conga Trigger calls Conga Sign through a Salesforce Workflow Rule and bypasses the Conga Sign user interface. Conga Trigger is a paid add-on and is not included with the Composer.

### Prerequisites

- [Setup a Salesforce Community](#).
- [Install Conga Sign](#).
- If using Conga Composer, [Install Conga Composer](#).
- If using Conga Trigger, [Install Conga Composer](#) and [Install Conga Trigger](#).

**⚠** Conga Sign is not compatible with the Guest User profile in Salesforce Communities.

## To create and add a Conga Sign Button to a Salesforce Community

1. Create a Conga Sign button or use the native **Send with Conga Sign** button.
2. Test that the Conga Sign-integrated Composer button successfully sends a Conga Sign Transaction.



3. Place the Conga Sign button on the desired object's Lightning Page or Page Layout so it appears in the Salesforce Community.

## To create and add a Conga Sign-integrated Composer Button to a Salesforce Community

1. Create a **Conga Sign-integrated Composer** button.
  - Use Conga Sign Integration Parameters to integrate Conga Sign with a **Composer** button. The button must have the **CSVisible**, **CSRecipient**, and **TemplateID** parameters at a minimum.
  - (Optional) Pre-tag the Conga Template document with [Conga Sign tagging syntax](#).
2. Test that the **Conga Sign-integrated Composer** button successfully sends a Conga Sign Transaction.
3. Place the **Conga Sign** button on the desired object's Lightning Page or Page Layout so it appears in the Salesforce Community.

## To create and add a Conga Sign-integrated Trigger solution to a Salesforce Community

1. Create a **Conga Sign-integrated Composer** button.
  - Use Conga Sign Integration Parameters to integrate Conga Sign with a **Composer** button. The button must have the **CSVisible**, **CSRecipient**, and **TemplateID** parameters at a minimum.
  - Pre-tag the Conga Template document with [Conga Sign tagging syntax](#).
  - Test that the **Conga Sign-integrated Composer** button successfully sends a Conga Sign Transaction.
2. Convert the **Composer** button into a Conga Trigger formula field using the Conga Trigger Formula Builder.
  - The Conga Trigger formula field must have **Qmode=CongaSign**.
3. Create a Salesforce Workflow Rule for the Conga Trigger Solution. The Workflow Rule determines the criteria for when the document is merged and sent with Conga Sign.
4. Test the Conga Trigger solution to confirm it successfully creates a Conga Sign Transaction.

**i** Conga Trigger bypasses the user interface and automatically sends the transaction.

## Using Conga Sign with Conga CLM

Conga Sign integrates with Conga CLM, allowing you to generate and send documents for eSignature via Conga CLM. Agreements will now have an option for *Send with Conga Sign* under the Agreement Lifecycle Actions.

**i** For more information regarding setting up Conga CLM, refer to [Setting up Conga CLM](#) documentation.


## CLM-Conga Sign Custom Settings

The Conga Sign/Conga CLM integration requires the configuration of Custom Settings, found in the [Post-Installation](#) steps of Conga CLM.

### Customizing the CLM-Conga Sign Settings

System Properties describes the configuration of the working environment and allows you to customize your system settings. Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache that you can access efficiently, without the cost of repeated queries.

### To customize the CLM-Conga Sign Settings


1. Go to **Setup > App Setup > Develop > Custom Settings**.
2. Click **Manage** for **CLM-Conga Sign Settings**.
3. Click **New** in the Default Organization Level Value section.
4. Select Profile or User from the Location dropdown.
5. According to your selection in the previous step, enter a profile name or user name and click the lookup icon () to open the Lookup window.
6. Select a relevant profile name or user name.
7. Enable or disable the following properties for the selected profile or user and click **Save**.

Custom Setting	Help Text	Default Value
Show Related Documents	Allow selection of documents from related, sibling, parent and child agreements	FALSE
Filter By Primary Agreement Status	Filter documents from related, sibling, parent and child agreements based on primary agreement status. This setting applies when Show Related Documents is enabled.	FALSE

## Using Conga Sign with Conga Composer

Conga Sign integrates with Conga Composer, allowing you to generate and send documents for eSignature using all the features of Conga Composer, the leading document generation app for Salesforce. After purchasing Conga Composer, use the [Conga Sign Integration Parameters](#) to set up the integration.

Additionally, Conga Sign and Conga Composer can be automated using Conga Batch and Conga Trigger. For more information, see the [QMode](#) parameters.

 If you want to send multiple documents for eSignature in a single transaction using Conga Composer, you must provide the [CSMultiDocs=1](#) and [zipFiles=0](#) parameters. For more information on sending multiple documents for eSignature, refer to [Sending Document for eSignature](#) in the *Conga Sign User Guide*.

## Using Conga Sign with Conga Contracts for Salesforce

Conga Sign integrates with Contracts for Salesforce, allowing you to use Conga Sign for your eSignature transactions. The integration simplifies the process flow for customers who use both products. The Conga Sign button is available on the Send for Negotiation user interface in Contracts for Salesforce.

# Conga Sign for Users

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

Topic	Description
What's Covered	This guide walks the Conga 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 Conga Sign.
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 Conga Sign Documentation</a> .
Other Resources	<ul style="list-style-type: none"> <li>• <i>Conga Sign for Administrators</i>: Refer to this guide to set-up the entire Conga Sign process.</li> </ul>

Select one of the following topics for more information:

- [Conga Sign Product Guide](#)
- [Conga Sign Product Limits](#)
- [Available Features for Conga Sign Integrations](#)
- [List of Conga Sign Signature Tags](#)
- [Using Signature and Custom Tags](#)
- [Creating a Document to Sign](#)
- [Creating New Recipients in Create Transaction UI](#)
- [Sending Documents for eSignature](#)
- [Signing a Document](#)
- [In Person Signing](#)
- [Canceling a Conga Sign Transaction](#)
- [Conga Sign Link Expiration](#)
- [Conga Sign Recipient Object](#)
- [Reassigning Signers as a Recipient](#)
- [Reassigning Signers from Salesforce](#)

- [Audit Trail](#)
- [SMS Authentication](#)
- [Supported Languages in Conga Sign](#)
- [Troubleshooting Topics](#)

## Conga Sign Product Guide

### Learn Conga Sign

- [About Conga Sign for Users](#)

### Install Conga Sign

- [Install Conga Sign](#)
- [What's in the Package?](#)

### Configure Conga Sign

- [Configure Conga Sign](#)
- [Add Sign Button and Transactions Related List to the Page Layout](#)
- [Permissions Needed to Use Conga Sign](#)

### Use Conga Sign

- [Sending Documents for eSignature](#)
- [Creating a Document to Sign](#)

### Use Signature Tags with PDF Forms

- [How to Sign a Document](#)
- [Audit Trail](#)

## Conga Sign Product Limits

The table below summarizes current product limits for Conga Sign.

Conga Sign Feature	Documented Limit
Conga Sign Tags in a Conga Sign document	1,000 tags
Amount of Recipients per Conga Sign Transaction	10 recipients
File size of a Conga Sign document	50 MB or 500 pages
Conga Sign Email Subject	1,000 characters
Conga Sign Email Body	50,000 characters
Salesforce objects a user can configure in Automatic Configuration at one time	10 objects
Salesforce profiles a user can configure in Automatic Configuration at one time	10 profiles
Amount of signers assignable to a Write back tag	1 signer
Conga Sign document files	Word and PDF
Signing user interface timeout	1 hour
Conga Sign invitation email expiration	5 days

## Available Features for Conga Sign Integrations

Conga Sign integrates with Conga Collaborate and Conga Contracts in addition to the standard Salesforce integration. The feature comparison matrix below depicts available Conga Sign features for each product integration.

FEATURE	Conga Sign for Salesforce	Conga Sign for Conga Collaborate	Conga Sign for Conga Contracts
Send for Signature functionality	Yes	Yes	Yes

FEATURE	Conga Sign for Salesforce	Conga Sign for Conga Collaborate	Conga Sign for Conga Contracts
Basic Tags	Yes	Yes	Yes
Custom Tags	Yes	Yes	Yes
Setting tags as optional	Yes	No	No
Parallel Routing Type	Yes	No	Yes
Serial Routing Type	Yes	Yes	Yes
Custom Email Subject	Yes	Yes	No
Custom Email Message	Yes	Yes	Yes
Audit Trail	Yes	Yes	Yes
Reassign signers	Yes	No	Yes
Tagging user interface	Yes	No	Yes
Write back tags	Yes	No	No
Branding in the Signing user interface	Yes	No	No
Transaction expirations	Yes	No	No
Transaction expiration reminders	Yes	No	No
SMS Authentication	Yes	No	No
Transaction Reminders	Yes	No	Yes
Attachment Tags	Yes	No	No
Business Units	Yes	No	No

FEATURE	Conga Sign for Salesforce	Conga Sign for Conga Collaborate	Conga Sign for Conga Contracts
Multiple Documents	Yes	No	Yes

The Conga Sign Audit Trail is accessible in Conga Contracts by clicking a completed signature or initial tag in the final Conga Sign document. For more information, see *Conga Sign Integration with Conga Contracts* topic in the *Conga Contracts Administrator Guide*.

## List of Conga Sign Signature Tags

The following eSignature tags are available to use in a document with Conga Sign. You can add tags by dragging and dropping a tag in the Preview and Tag screen of Conga Sign. Conga Sign tags can be specified as required or optional for signers to sign. If a tag is set to required, a signer must complete the tag in a Conga Sign transaction. In the Basic Tag Configuration section of the Conga Sign Setup tab, you can set tags as Required or Optional.

When using pre-tag syntax in a Conga Sign document, Conga Sign places the tag at the bottom left of the first line of syntax text. If tagging syntax wraps, Conga Sign aligns the tag to the left of the first line. It is suggested to use small font size in the Conga Sign document when a tag is lengthy (write back tags may be lengthy when using a default value and setting a text size).

You can add custom tags to address business needs in addition to the standard tags below. To learn more about custom tags see: [Using signature and custom tags](#).

Purpose	Conga Sign Tag	Required or Optional
Signature of Recipient 1	\signature\	Required
Initial of Recipient 1	\initial\	Required
Stamp of Recipient 1	\stamp\	Required
Name of Recipient 1	\fullname\	Required
Title of Recipient 1	\title\	Required or Optional
Email of Recipient 1	\email\	Required



Purpose	Conga Sign Tag	Required or Optional
Date of Recipient 1	<code>\date1\</code>	Required
Company of Recipient 1	<code>\company1\</code>	Required or Optional
Checkbox of Recipient 1	<code>\checkbox1\</code>	Required or Optional
Attachment of Recipient 1	<code>\attachment1 {"label": "Driver's License"}\</code>	Required or Optional
Customtext	<code>\customtext1 {"label": "Address"}\</code>	Required or Optional

Tags can be incremented with the number 1-10. Each number represents the corresponding signer. For example, `\signature2\` is the tag for the second recipient. You can give custom tags attributes and properties. For example, you can add a label to the custom text tag: `\customtext1 {"label": "Add a label here"}\`

The checkbox tag features a transparent section to the right of the checkbox that can be placed over text without blocking out content in a Conga Sign document. This allows users to closely place the actionable checkbox tag next to the text in a Conga Sign document. For more information on custom tags, see [Using signature and custom tags](#).

- ✓ If you do not want Conga Sign tags to appear in your document, change the font color to white.

The table below defines the available tag syntax properties.

Purpose	Property	Values	Example
Add a label to a custom text tag or write back tag	"label"	Any string	<code>\customtext1 {"label": "Address"}\</code>
Add a default value for custom text or write back tag	"defaultValue"	Any string	<code>\customtext1 {"label": "Association", "defaultValue": "Conga Sign"}\</code>
Set a maximum length of a value for custom text or write back tags	"maxLength"	Any number from 1 to 255	<code>\customtext1 {"label": "Phone Number", "maxLength": "10"}\</code>

Purpose	Property	Values	Example
Associate a write back tag with the correct Salesforce field	"apiName"	Any string	\wb1 {"label": "Billing City", "apiName": "Account__r.BillingCity"}\
Make a tag required or optional	"required"	"true" or "false"	\customtext1 {"label": "Phone Number", "required": "true"}\
Custom format for a Sign Date tag	"format"	"MM/DD/YYYY", "DD/MM/YYYY", "DD-MMM-YYYY", or "MMM DD, YYYY"	\date1 {"format": "DD-MMM-YYYY"}\
Specify the text size of a tag	"textSize"	"small", "medium", "large", or "x-large"	\customtext1 {"textsize": "x-large"}\
Specify the size of a Signature or Initials tag	"size"	"small", "medium", "large", or "x-large"	\signature1 {"size": "large"}\

## List of recognized Adobe Sign formats for signature tags

The table shows the supported syntax, where 1 is the signer index [1..10]:

Purpose	Adobe sign Tag
Signer Signature Tag	{{<UniqueFieldName>_es_:signer1:signature}}
Signer Initials Tag	{{<UniqueFieldName>_es_:signer1:initials}}
Signer Title Tag	{{<UniqueFieldName>_es_:signer1:title}}
Signer Company Tag	{{<UniqueFieldName>_es_:signer1:company}}
Signer Full Name Tag	{{<UniqueFieldName>_es_:signer1:fullname}}
Signer E-mail Address Tag	{{<UniqueFieldName>_es_:signer1:email}}

Purpose	Adobe sign Tag
Signer Signed Date Tag	{{<UniqueFieldName>_es_:signer1:date}}

Standard Adobe Sign Tag syntax:

```
{{<Prefix><FieldName>_es_:<Role>:<FieldType>:<Rule1>:<Rule2>}}
```

## Ignored Adobe Features

Adobe Sign has some optional flags that can be applied to a tag, such as required and read-only. These flags can be added using prefixes, as follows:

```
{{*!<UniqueFieldName>_es_:signer1:title}}
```

 where \* == required, ! == read-only

The flags can be trailing the suffix, as follows:

```
{{<UniqueFieldName>_es_:signer1:title:readonly:required}}
```

## Unsupported Adobe Features

Adobe Sign has some other tag types, such as tags that allow custom tag input, and tags that dynamically execute expressions or logic to determine actions. Note that none of these types are supported by Conga Sign. These tags are treated as blocks of text.

- Custom input tag without a trailing field type: `{{<UniqueFieldName>_es_:signer1}}`
- Dynamic return value through a calculator, dynamic hide or show through show if rule: `{{<UniqueFieldName>_es_:signer1:calc(1+4):showif(1+4>6)}}`

For more information on Adobe Sign text tags, see [Adobe Sign text tags](#).

## List of recognized DocuSign formats for signature tags

Conga Sign recognizes DocuSign formats for signature tags. The table below shows the supported syntax, where 1 is the signer index [1..10].

Purpose	DocuSign Tag
Signer Signature Tag	\s1\
Signer Initials Tag	\i1\

Purpose	DocuSign Tag
Signer Title Tag	\t\
Signer Company Tag	\c\
Signer Full Name Tag	\n\
Signer E-mail Address Tag	\e\
Signer Signed Date Tag	\d\

For more information on DocuSign signature tags, see [Automatic anchor text and tags](#).

## Using Signature and Custom Tags

You can gather some information from another user in the documents being sent for the signature that is not addressed with Conga Sign seven standard tags. Custom tags or tag syntax can be added to collect additional information in the document. You can drag and drop the custom tag onto your document and add a label in the tag itself.


### Custom tags

You can also add custom tags, like the customtext tag. When pre-tagging documents through tagging syntax, use the following format:

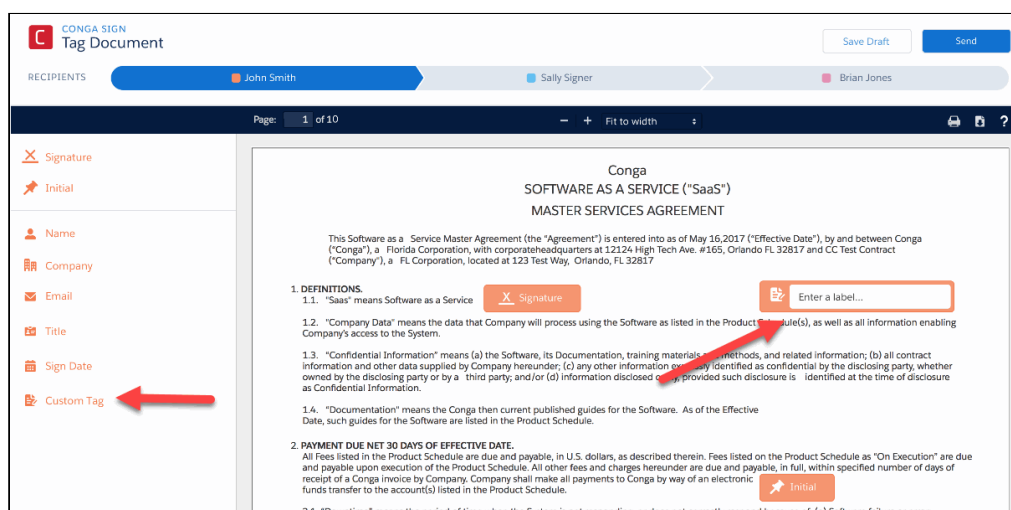
`\customtext1{"label":"value"}\` where value is the label name the signers see. For example, If you want the label to be a PO Number: `\customtext1{"label":"PO Number"}\`

You can give customtext tags attributes and properties. For example, you can add a label to the custom text tag: `\customtext1{"label": "Add a label here"}\`

Similar to other tag properties, the 1 represents the signer ID. The attributes are encoded in JSON format and attribute keys are case sensitive. The key and values must be within quotation marks.

 Labels are the only properties supported.

Custom tags can be found in the signature panel. Drag and drop the tag anywhere in the document and label it however best meets your business needs. You can also use custom tag syntax to add a tag to the document.



Conga Sign also supports tag syntax for other products. For example, Conga Sign recognizes the default automatic anchor text used for different DocuSign fields (formerly tags), based on the Role assigned to a signer in Salesforce. This is the text typed in documents as a placeholder when creating and saving the documents. Conga Sign also recognizes text tag syntax that is used in Adobe Sign.

## Use Conga Sign Signature Tags with PDF Files

This article describes how to add Conga Sign signature tags to Conga Sign PDF file. Use this method to send a PDF file for signature with Conga Sign. These instructions are specific to Adobe Acrobat X Standard.

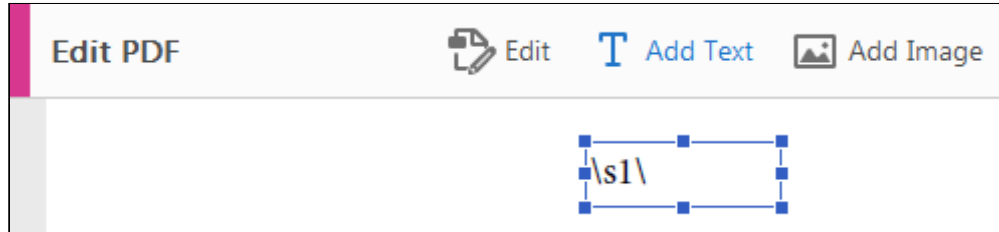
Add Conga Sign tags to a PDF file for use with Conga Sign and Conga Sign-integrated Composer solutions. This method allows users to utilize pre-tagged PDF files as Conga Sign documents or Conga Composer Templates.

**Both Conga Sign automatic anchor tags and Conga Composer merge fields populate when the template is sent for signature using this method. These instructions are specific to Adobe Acrobat X Standard.**

To add Conga Sign signature tags to a PDF template (using Adobe Acrobat X Standard):

1. Create a PDF file or open an existing PDF file.
  - (Optional) If using in conjunction with Conga Composers, add Composer merge fields to the PDF document.

- For more information on creating a Composer PDF template, see [PDF forms reference guide](#).
2. Open the PDF file in Adobe Acrobat, click **Tools**, and then click **Edit**.
  3. Click **Add Text** and select an area in the PDF template to place a Conga Sign tag.
  4. Add a Conga Sign tag's tagging syntax to the text field.



- For a list of all Conga Sign tags and their respective tagging syntax, see [List of Conga Sign signature tags](#).
5. (Optional) Repeat Steps 3 and 4 to additional Conga Sign tags.
  6. Save the PDF template.

## Formatting Conga Sign Date of Recipient Tag

Use tagging syntax in a Conga Sign document to format the standard Date of Recipient Date tag to your preferred date format.

**⚠** If no date format is specified in the tagging syntax, the default date format of mm/dd/yyyy is used.

The following date formats are supported:

- MM/dd/yyyy
  - Example: 01/23/2020
- dd/MM/yyyy
  - Example: 23/01/2020
- dd-MMM-yyyy
  - Example: 23-Jan-2020
- MMM dd, yyyy
  - Example: Jan 23, 2020

To format the Conga Sign Date tag, add one of the supported date formats to the Date of Tag tag syntax as depicted in the example below.

Example syntax: `\date1 {"format":"dd-MMM-yyyy"}\`

Example output: **14-Feb-2019**

# Write Back tags


## What is Write Back?

Conga Sign Write Back functionality uses Conga Sign tags to configure and map standard and custom Salesforce fields in documents. The information added by signers within documents is sent directly to Salesforce and updates the appropriate records. The Sign Write Back functionality eliminates redundant data entry and possible errors associated with those manual processes.

## How it works

The Write Back process consists of users selecting tags and Salesforce objects related to those tags, signers adding data to those tags, and then the data is directly updated to the appropriate Salesforce record.

The Write Back Configuration tab is located within Conga Sign Setup. On the Configuration tab, users can search for both standard and custom objects in Salesforce, choose fields associated with those objects that they would like to make available for write back, and define basic properties for how those fields should work when used as tags in a Conga Sign document.

 The object where the Salesforce field used for a Write Back tag is located must be configured in the Org Configuration section of Conga Sign Setup.

When fields are configured to use with Conga Sign Write Back, signers have two options to get the appropriate tags into documents.

- In the Tagging screen
  - A new section of tags is made available under the Write Back heading. The list of write back tags made available in the Tagging screen is based on the fields that were configured for the parent object from which the Conga Sign transaction originated.
  - Drag and drop a write back tag onto the document for the signer that is responsible for providing the requested information.
- Add write back tags to a document is through the Conga Sign tagging syntax
  - Like standard Conga Sign tags can be added through tagging syntax, any field configured to function with write back can be added to your document templates.

- In order to simplify the process, the write back field properties screen for each write back field has an example of the syntax. RECOMMENDED: Copy and paste the example syntax into your templates. Update the signer index and you're ready to go.

**i** Only one signer can be assigned each write back tag to avoid any potential data conflicts during the write back process. Ensure only one signer is used per write back tag while updating your templates because any conflicts result in an error and a new transaction must be created.

Conga Sign Write Back enforces a limit of one signer per write back tag to eliminate any potential data conflicts if multiple signers were asked to provide the same information. This same limit is not in place for write back tags specific to the signer's contact, lead, or role record in Salesforce as those are specific to an individual signer.

## Field Types available for Write Back

The following field types are available to use with write back:

- Lookup - Lookup fields can be used to write back to other object records, including parent and grandparent records.
- Text - Standard Text fields can be used for write back. Conga Sign is unable to write back to Text Area, Text Area (Long), Text Area (Rich), or Text (Encrypted) at this time.
- Number
- Checkbox
- Email
- Phone
- URL
- Picklist - Standard Picklist fields can be used for write back. Conga Sign is unable to write back using Picklist (Multi-select) and is unable to be used with a Dependent Picklist.

## Write Back Tagging Syntax

The best way to get your newly configured write back tags into your documents is to simply copy and paste the tagging syntax from the write back field properties page. Update the signing index to reflect the appropriate signer.



Define Write Back Field Properties

\*Field Label  
PO Number

\*API Name  
congasignalpha\_\_PO\_Number\_\_c

\*Tagging Syntax  
\wb1 {"apiName":"congasignalpha\_\_PO\_Number\_\_c"}\

Note: When adding this syntax to templates, only one signer per write back tag

Field Options  
☐ Required

Field Size  
255 Character Maximum

Cancel Save

## Using write back tags

The information added by signers within documents is sent directly to Salesforce and updates the appropriate records. The Sign write back functionality eliminates redundant data entry and possible errors associated with those manual processes.


A Write Back Configuration tab is located within the Conga Sign setup. On the Configuration tab, signers can search for both standard and custom objects in Salesforce, choose fields associated with those objects that they would like to make available for write back, and define basic properties for how those fields should work when used as tags in a Conga Sign document.

When fields are configured to use with Conga Sign Write Back, signers have two options to add appropriate tags into documents: Use the tagging user interface or tagging syntax.

## To configure write back tags in the Tagging user interface

1. In Salesforce, open the App Launcher and select **Conga Sign**.
2. Go to **Conga Sign Setup > Write Back Configuration**.
3. Select an **Object**. You can do a quick search to locate an object.
4. Select the object fields.
5. Define the properties in the Define the Write Back Field Properties screen.

6. Click **Save**.


 Conga Sign Write Back enforces a limit of one signer per write back tag to eliminate any potential data conflicts if multiple signers were asked to provide the same information. This same limit is not in place for write back tags specific to the signer's contact, lead, or role record in Salesforce as those are specific to an individual signer.

## Setting Default Values for Write Back Tags

Conga Sign has the capability to set a pre-populated default value for write back tags. Signers can keep or change the default value in the Conga Sign document. The value entered in the completed document is then updated on the corresponding field in Salesforce.

There are two ways to pre-populate default values in Conga Sign write back tags.

- Using Conga Composer merge fields to dynamically populate a record specific default value
- Populate a static value that is not record specific default value

 Dynamically populating a default value for write back tags requires Conga Composer, as it requires merge fields. This is the only method available for referencing Salesforce field values as default values in write back tags.

### Using Conga Composer Merge Fields to Set a Dynamic Default Value

After obtaining the text-based merge field from Conga Composer's Template Builder, adjust the write back tag's syntax to include the code for default values as demonstrated below.

```
\wb1 {"apiName": "Account_Field__c", "defaultValue": "{{ACCOUNT_FIELD}}"}\
```

### Using Static Data to Set a Default Value

Use the syntax below to reflect a static value in a write back tag.

```
\wb1 {"apiName": "Account_Field__c", "defaultValue": "Blue"}\
```

# Setting a Write Back Tag as Optional or Required

## Required versus Optional Write Back Tags

Conga Sign Write Back tags can be set as required or optional for signers.

If a Write Back tag is set as Required, Signers cannot complete the Conga Sign Transaction until the required Write Back tag is filled out. Conversely, configuring a Write Back tag as optional allows signers to complete the Conga Sign Transaction without filling out the Write Back tag.

- ✔ Write Back functionality allows one signer per Write Back tag in a Conga Sign Transaction to prevent multiple field updates on the same record in Salesforce.

## Setting a Write Back Tag as Required or Optional

Setting a Write Back tag as required or optional is done in the Write Back Configuration section of Conga Sign Setup object.

### To set a tag as Required or Optional

1. Navigate to **Write Back Configuration** section of the **Conga Sign Setup** object.
2. Click the drop-down arrow next to the related field and click **Edit**.
3. Check the **Required** field under **Field Options** to make the tag required for signers.

### Define Write Back Field Properties

**\* Field Label**

Favorite Movie

**\* API Name**

Favorite\_Movie\_\_c

**\* Tagging Syntax**

\wb1 {"apiName":"Favorite\_Movie\_\_c"}\

Note: When adding this syntax to templates, only one signer per write back tag

**Field Options**

☒ Required

**Field Size**

155

Character Maximum

Cancel

Save

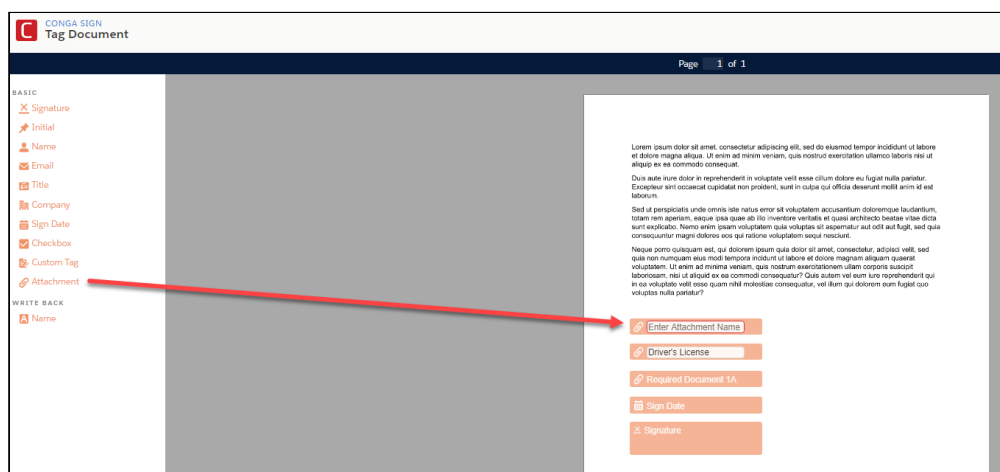
The required Write Back field appears with a red outline and the Signer cannot complete the signing until the field is filled out.

## Attachment Tags

The Attachment tag allows recipients to upload files directly from the signing user interface into Salesforce. Files uploaded with the Attachment tag automatically upload to the related Salesforce record as a Salesforce File. This provides Conga Sign users the ability to collect additional documents and images in a Conga Sign Transaction, such as identification, purchase orders, and proof of insurance.

## Adding an Attachment Tag to a Conga Sign Document

Simply drag and drop the Attachment tag onto your Conga Sign document in the Conga Sign tagging user interface. Once the tag is added to the document, enter a unique label for the specific Attachment tag to prompt users to upload the correct file.



Conga Sign users can also use [tagging syntax](#) to pre-tag the document with Attachment tags.

Example tagging syntax:

- \attachment1 {"label":"Driver's License"}\
- \a1 {"label":"Driver's License"}\

**⚠** It is recommended to use a label in an Attachment tag's tagging syntax. This ensures that the tag is appropriately named in the Conga Sign document. A label is required for an Attachment tag when adding it to the Preview and Tag user interface. If no label is provided in an Attachment tag's tagging syntax and the document is sent for signature, the tag will appear with no text.

The Attachment tag is set to Optional by default. To make Attachment tags required in Conga Sign documents by default, change Attachment's value from Optional to Required in the Basic Tag Configuration section of Conga Sign Setup. Users can also set an Attachment tag to Required in the tagging user interface by modifying the tag properties or by designating it as Required with tagging syntax.

**i** Supported file types for the Attachment tag include PDF, .Doc, .Docx, JPEG, PNG, and GIF. The maximum filesize for an attachment is 10 MB.

## Uploading an Attachment as a Recipient

To upload a file with the Attachment tag, click an Attachment tag in a Conga Sign document.

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.


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 Proof of Insurance

 Driver's License

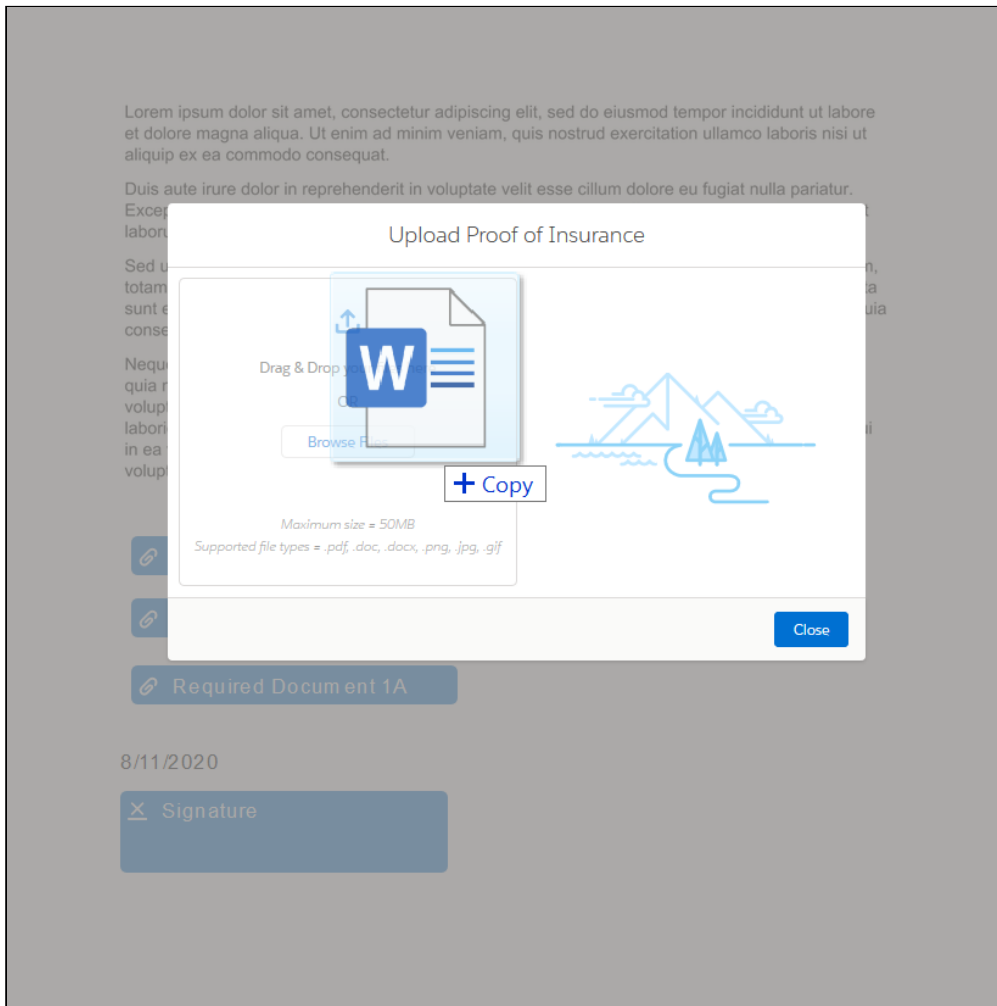
 Required Document 1A

8/11/2020

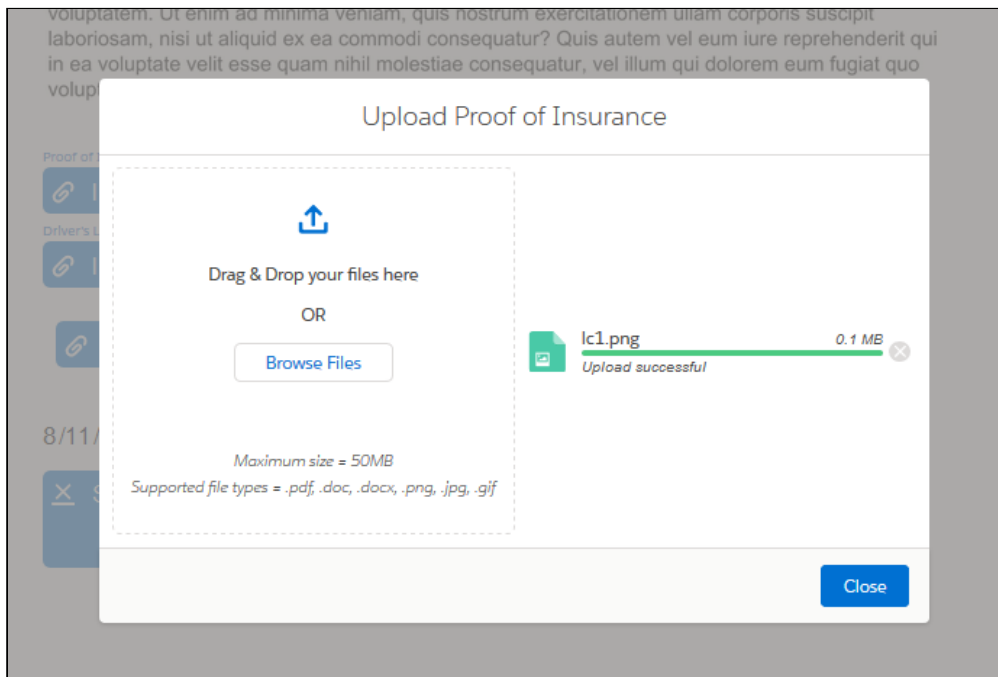
 Signature

Recipients can then click Browse Files to search and select a file on their device, or drag and drop a file into the file drop zone.

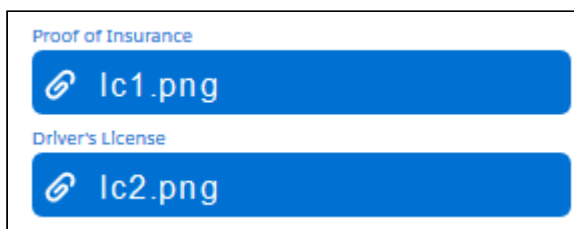
 Users can upload a maximum of one file per Attachment tag.



Once a file is successfully uploaded to the Attachment tag, the progress bar displays as completed and a message confirms the successful file upload.



Upon clicking Close, the Attachment tag's designated label is displayed above and the tag itself displays the uploaded file name.



Recipients can remove a file uploaded to an Attachment tag (before the Conga Sign document is completed) by clicking the Attachment tag and then clicking the x icon next to the progress bar.

**i** The Attachment tag's file is uploaded to Salesforce once all recipients complete their assigned tags and the Conga Sign Transaction is complete.

## Resizing Conga Sign Tags

Conga Sign has the capability to increase and decrease the size of [Conga Sign tags](#) within the Preview and Tag user interface.

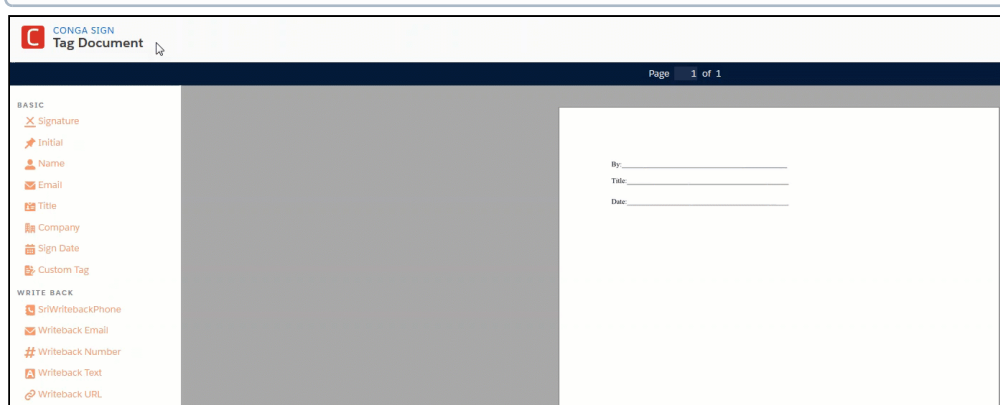
Different use cases and the corresponding templates have varying requirements, many of which need smaller and larger tag sizes. Conga Sign offers flexibility to change tag size on



the fly. You can resize both standard and custom Conga Sign tags by simply hovering above the tag and dragging the corners.

In the Preview and Tag user interface, all tags (Custom tags, Basic tags, and Write Back tags) initially have the same default size. When resizing tags, the text size and tag properties are automatically proportioned to the resized tag. Conga Sign offers four tag sizes for text fields, each with matching text size.

**i** It is recommended to resize and test Conga Sign tags in your template prior to sending for signature. This allows you to determine the appropriate tag size to best fit the template.



## Setting the Text Size of Conga Sign Tags

Conga Sign features the ability to set the text size of tags in a pre-tagged document. Setting the text size of tags in a pre-tagged document saves users time, as they do not need to re-size tags manually in the Preview and Tag user interface.


**i** When using a Conga Sign integrated Composer button, set the text size of your tags in the pre-tagged document and leverage the DS7 parameter to send the document with resized tags in background mode.

Setting the text size in a pre-tagged document is available for standard tags, custom tags, and write back tags. The available sizes are small, medium, large, and extra-large. All tags other than the standard Initial and Signature tags retain the default medium tag size if a tag size is not defined. The standard Signature and Initial tags retain a default size of extra-large.

## Setting the Text Size for Different Tag Types

The syntax for tag size differs depending on the type of tag. The Signature and Initial tags use the size property in the tagging syntax. All other tags use the textsize property in the tagging syntax to determine tag size. Add the following syntax to the end of your tag:

- Signature and Initial tags - {"size":"add tag size here"}
- Write back tags - {"textsize":"add tag size here"}
- All other Conga Sign tags - {"textsize":"add tag size here"}

 The textsize property will not work with the Signature and Initial tags. Ensure that you use the correct size or textsize property syntax when setting a tag's size.

## Available Tag Sizes

Use the following sizes in the tag syntax to modify the size of the tags in the pre-tagged document.

- x-small
- small
- medium
- large
- x-large

## Tag Size Syntax Examples for Each Tag Type

The examples below demonstrate tag sizing syntax for each tag types.

- Signature tag: \signature1 {"size":"medium"}\
- Initial tag: \initial1 {"size":"small"}\
- Standard tag: \title1 {"textsize":"small"}\
- Custom tag: \customtext1 {"label":"Address", "textsize":"medium"}\
- Write back tag: \wb1 {"apiName":"Customer\_Email\_\_c", "textsize":"x-large"}\

## Font Sizes for Each textSize

The font sizes below correspond to each textSize for Conga Sign tags.

⚠ The Signature and Initial tags do not having corresponding font sizes.

- x-small - 8 pt
- small - 10 pt
- medium - 13 pt
- large - 16 pt
- x-large - 18 pt

## Example of Different Tag Sizes in a Conga Sign Document

Here is an example of tag sizing for different tag types in a pre-tagged document.

Please fill out the information below.

`\signature1 {"size":"large"}\`

`\initial1 {"size":"medium"}\`

`\wb1 {"apiName":"PO Number _c", "textsize":"small"}\`


`\company1 {"textsize":"medium"}\`


`\title1 {"textsize":"large"}\`


`\date1 {"textsize":"x-large"}\`


Test out the sizing of each tag in the Preview and Tag user interface to ensure it best fits your document.


Please fill out the information below.


 Signature

 Initial

 PO Number

 Company

 Title

 Sign Date

Once the Conga Sign document is received, the input text automatically resizes based upon the defined size for each tag.

Please fill out the information below.

 Walker Llewellyn

 WL

408

Blue Cube

Management


02/22/2019

## Setting the Width of a Conga Sign Tag

Conga Sign allows users to set the width of tags in a pre-tagged document. Setting the width of tags in a pre-tagged document determines the amount of space (in pixels) that a signer has to enter data in the Signing user interface.

Signers can enter more characters than the specified tag width displays. Tag width affects the display of text input in a tag within the Signing user interface. In the final document, all entered text will render despite whether or not it is over the designated width's amount of pixels.

Setting the tag width in a pre-tagged document is available for all Conga Sign tags except for the Signature, Initial, and Checkbox tags.

 The default tag width is 200 pixels.

## Tag Width Syntax

Tag width syntax dictates a tag's width that a signer sees during the signing portion of a Conga Sign Transaction. Users can reference both [text size](#) and width syntax to determine both the text size and width of a Conga Sign tag.

For example, a Conga Sign tag with a width of 150 allows signers to input 150 pixels worth of text before it is cut off in the Signing user interface. If the signer enters more text than specified in the tag width syntax, all entered text displays in the completed document, but text that surpasses the designated width does not display in the Signing users interface.

Use the syntax below to a tag to determine the tag width:

- {"width":"number of pixels"}
- {"w":"number of pixels"}

## Tag Width Syntax Examples

The examples below demonstrate tag width syntax:

- Company tag with tag width syntax: \company1 {"width":"100"}\
- Custom tag with tag size and width syntax: \customtext1 {"label":"Address","textsize":"large","w":"150"}\
- Write back tag with tag size and width syntax: \wb1 {"apiName":"Customer\_Email\_\_c", "textsize":"x-large","width":"275"}\

Examples of Different Tag Sizes in a Conga Sign Document

Below is an example of tag width and sizing syntax for different tag types in a pre-tagged document.

<b>Company Name:</b>	\company1 {"width":"150"}\
<b>State Code:</b>	\customtext1 {"label":"State Code","textsize":"large","w":"50"}\
<b>Email:</b>	\wb1 {"apiName":"congasignalpha_Writeback_Email__c", "textsize":"small", "width":"250"}\

Test out the width and sizing of each tag in the Tagging user interface to ensure it best fits the Conga Sign document.

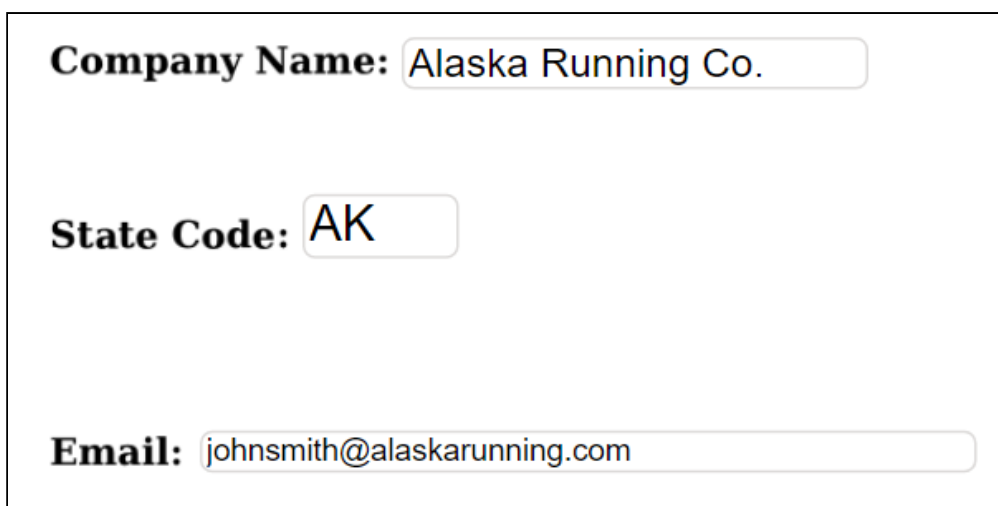


**Company Name:**  Company

**State Code:**  St

**Email Address:**  Writeback Email

Once the Conga Sign document is received, the tag width adjusts to the pixel size defined in the tagging syntax.



**Company Name:** Alaska Running Co.

**State Code:** AK

**Email:** johnsmith@alaskarunning.com

## Conditionally Display a Conga Sign Tag in Word

Using Conga Composer and Conga Sign, you can display or hide a Conga Sign Tag based upon a merge field's value.

For example, you can leverage an IF statement in Word to show the standard \date\ tag if the {{Date\_Requested\_Checkbox\_Field}} merge field is equal True. If the {{Date\_Requested\_Checkbox\_Field}} merge field is equal to False, then the standard \data\ tag is hidden.

## Syntax for Referencing Conga Sign Tags in an IF Statement

Below is example syntax for referencing Conga Sign tags in a Word IF Statement.

Standard Tag: `\\date\\`

Custom Tag: `\\customtext1 {\\label\\:"Address\\"}\\`

Write back Tag: `\\wb1 {"apiName\\:"account__text_field__c"}\\`

## IF Statement Syntax

See the syntax below for an IF statement corresponding to the example use case.


Example IF statement: `{ IF "<<Date_Requested_Checkbox_Field>>" = "True" "\\date\\ " "No Date Requested" }`

For more information on using a Word IF Statement with Conga Composer, see [How to Compare Two Values in Word Templates using IF Statements](#) topic in *Composer Guide*.

## Text Wrapping Conga Sign Tags

Use Text wrapping to wrap a Conga Sign tag's input text in the final document. Text wrapping prevents a completed tag's input text from cutting off or overflowing off the page horizontally.

Completed tags with text wrapping that exceeds the [defined tag width](#) or the 255 character default limit automatically wrap and display text on new lines. The point at which text wraps is determined by a tag's width. Without text wrapping, lengthy tag entries can often be cut off and will not fully display in the final document.

 Text wrapping is reflected in the completed Conga Sign documents. It does not appear until the Conga Sign document is complete.

Text wrapping is only supported in pre-tagged documents. Conga Sign users cannot add text wrapping in the Preview & Tag user interface.

Words are never broken up in tags with text wrapping. If a word cannot fit on the same line, it is pushed to the next line automatically. Conga Sign wraps text by shifting the first lines of the text upwards, as opposed to shifting new lines down.



 Signature, Initial, Date, and Email tags do not support text wrapping.

## Text Wrapping Syntax

Add the "wraptext":"true" syntax or "wt":"true" (short form) to a tag's pre-tag syntax to enable text wrapping.

Example Syntax:

```
\customtext1 {"label":"Description","width":"300","textsize":"small","wraptext":"true"}\
\title1 {"width":200,"textsize":"medium","wt":"true"}\
```

## Best Practices for Text Wrapping

- Use smaller font size for pre-tag syntax so it does not take up as much space in the document.
- Use the [text size](#) and [tag width](#) properties with text wrapping.
- Test different variations of text size and tag width to ensure the completed tag fits appropriately in the document.

## Examples Text Wrapping with Text Size and Tag Width Variations

The examples below depict using the different tag sizes and tag widths in conjunction with text wrapping.

## Pre-Tag Syntax:

```
\customtext1 {"label":"Description 1","width":"500","textsize":"large","wraptext":"true"}\
```

```
\customtext1 {"label":"Description 2","width":"400","textsize":"medium","wraptext":"true"}\
```

```
\customtext1 {"label":"Description 3","width":"200","textsize":"small","wraptext":"true"}\
```

```
\customtext1 {"label":"Description 4","width":"150","textsize":"x-small","wraptext":"true"}\
```

## Signing Experience User Interface:

Page 1 of 1

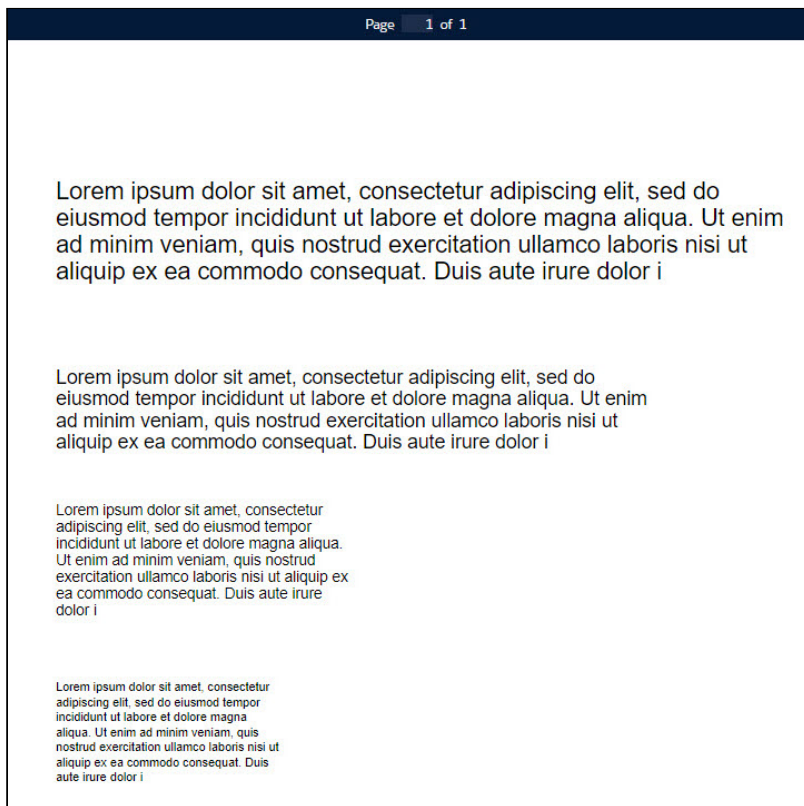
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod

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## Completed Tags with Text Wrapping:



## Creating a Document to Sign

Another option is to use Conga Composer to generate the document with signature tags in it and then send for signature with Conga Sign.


## To upload the document and add tags

1. Click **Preview and Tag**.
2. Tag the document with signature fields, initial fields, or any other fields you require. Drag and Drop the blocks from the left-hand panel into the document.

Documents requiring more than one signer have an extra bar at the top of the document with color-coded names to distinguish field blocks. You can manually add signature tags as well. For a list of signature tags, see [List of Conga Sign Signature Tags](#).

## Creating New Recipients in Create Transaction UI

Conga Sign provides users the capability to easily create and add new Conga Sign Recipients in the Create Transaction user interface. In addition to selecting existing Contacts, Leads, and Users records, Conga Sign allows users to create new Conga Sign Recipients for a specific transaction without creating new Contact, Lead, and User records.

 Creating and adding a new Conga Sign Recipient to a transaction does not create a Contact, Lead, or User record in Salesforce. It creates a Conga Sign Recipient (custom object) record specific to that transaction only. New Conga Sign Recipients created with the parameters or methods below cannot be added or re-used in other transactions.

Administrators can also use the following [Conga Sign parameters](#) and [Conga Composer integration parameters](#) to dynamically create and add new Conga Sign Recipients to a transaction.

- Conga Sign Parameters to Add New Recipients
  - recipient[1-10]email
  - recipient[1-10]first
  - recipient[1-10]last
  - recipient[1-10]name
- Composer Integration Parameters to Add New Recipients
  - CSEmail[1-10]
  - CSFirst[1-10]
  - CSLast[1-10]
  - CSName[1-10]

## To add a New Recipient in the Create Transaction User Interface

1. Navigate to the **Create Transaction** user interface by launching a Conga Sign solution.
2. Click **Create New Recipient**.
3. Complete the required fields.

- a. First Name
  - b. Last Name
  - c. Email Address
4. Click **Save**.

Upon creating a new Recipient, Conga Sign adds that Recipient to the transaction and creates a new Conga Sign Recipient record.

## Sending Documents for eSignature

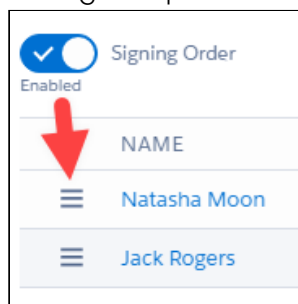
You can initiate an eSignature process from any object in Salesforce using pre-defined templates or by adding signature tags in real-time. In order to send documents for eSignature, you can use documents already attached to the record and select the documents from the list of the Available Documents, or you can upload the documents to be sent for eSignature using the Upload button, or you can use the Search bar to find documents stored in Salesforce. You can select multiple documents for signing within a single transaction. Then, you can select up to 10 recipients, set the signing order, customize the subject and message of the email, and set the expiration & reminders.

## To send documents for eSignature


1. Navigate to a record on an object where [Conga Sign is configured](#). (For example, navigate to an Opportunity record.)
2. Click **Send with Conga Sign**.
3. **Add Documents**
  - a. You can search for a file in Salesforce. Search look at all the Files in your Org.
  - b. Click **Upload File** to upload any Word or PDF file. You can also drag and drop the file.
  - c. **Available Documents** list shows all documents attached to that record. Select the documents that you want to send for eSignature. You can select multiple documents.
  - d. To sequence, drag documents into the correct order use the icon (≡) on the left.
  - e. To display only selected documents in the Available Documents list, click the toggle for **Only Show Selected** to enable it.
4. **Add Recipients**.
  - a. Search for Salesforce Contacts, Leads, or Users within Salesforce.
  - b. If the Recipient is not a Contact, Lead, or User in Salesforce, click **Create New Recipient** and complete the required fields to add a non-Salesforce Recipient.

For more information about creating a new Recipient in a Conga Sign Transaction, see [Creating New Recipients in Create Transaction UI](#).

- c. Configure optional features:



- Customize **Role**, **Language**, and **Authentication**, for each Recipient.

 For more information on setting up authentication, refer to [SMS Authentication](#).

- Enable **Signing Order** if you want the document to be signed by recipients in a specific order. To sequence, drag signers into the correct order using the icon (≡) on the left.

## 5. Advanced Options

- Compose a customized Subject and Message. If none is provided, a default is used.
  - Set the date and time for transaction expiration and reminders if desired. You can configure the following fields:
    - **Transaction Expiration**- Select the date and time when you want the transaction to expire. After the transaction is expired, the signer receives an email notification.
    - **Expiration Reminder** - Select the date and time when you want to send a reminder to the signer about the expiration of the transaction.
    - **Request Reminder** - Enter the number of days in which you want to send a reminder to the signer after you send the document. For example, you send the document today and you enter the value as 5. A reminder will be sent to the signer after 5 days.
- If tags exist, click **Send Now**.
  - If you need to add tags or preview, click **Preview and Tag**.
    - Tag the document with signature fields, initial fields, or any other fields you require. Documents requiring more than one signer have an extra bar at the top of the document with color-coded names to distinguish field blocks.
    - Drag and Drop the blocks from the left-hand panel into the document.
    - In case of multiple documents, select a file name from the dropdown list at the top to navigate between the documents. The dropdown displays the file name that you are viewing as you scroll between documents.

- d. Click **Send**.

This concludes the send for eSignature process using Conga Sign. You receive an email confirming the documents are sent and a link to the new audit trail. Your recipients are sent emails inviting them to sign the documents. Visit [Signing a Document](#) to learn about a recipient's signing experience.

## Sending Transactions with Multiple Documents

You now have the ability to use multiple documents in a single Conga Sign transaction. There are multiple changes to the way that documents are attached to the Transaction record.

### Fields on Transaction page layout

When multiple documents are used in a Conga Sign Transaction, the **Original Document Id**, **Content Document Id** and **Final Document Id** are not populated. They are populated, however, when only using a single document per transaction.

### Conga Sign Documents related list

There is a new related list added to the Transaction page layout, **Conga Sign Documents**. All documents on the Transaction have a new record created for this new related list, which has its own **Original Document Id**, **Content Document Id** and **Final Document Id** fields, which are populated when using multiple documents for a single Conga Sign Transaction. Also included is a **Type** field, to indicate the type of documents.

**Conga Sign Documents** has its own custom links for **View File** and **Download File**, where your users can view or download transaction files.

#### **Note**


The custom links **View File**, **Download Original Version**, and **Download Final Version** on the Transaction record do not pull attached documents if multiple documents have been sent for a single transaction. They will still function if a single document is used. It is recommended that System Administrators remove these links from the Transaction page layout and use the **Conga Sign Document** links.

New Users to Conga Sign have the related list already on the Transactions record. Users



that have previously installed Conga Sign need to manually add the related list to the page layout.

## To add the related list page layout

1. On Transaction, select Edit Layout
2. In the page layout editor, select **Related Lists**, then drag the **Conga Sign Documents** option to the related list segment.
3. Configure the Conga Sign Related List properties.
  - a. From the Conga Sign Documents related list, click the  icon and select the fields you wish to display on the related list.
  - b. We suggest including **Document Name**, **Document Order**, **Type**, and **Last Modified Date**.


## Sending Transactions using Send On Behalf Of

Send on Behalf allows you to send another User's information to someone other than the user who sends the Conga Sign transaction out. The transaction represents a user who does not create the initial transaction.

To use Send On Behalf Of features, you must set up either the necessary parameter on the Conga Sign **Send with Conga Sign** button or configure the Conga Sign [Business Units](#).

As you create the initial transaction using Send on Behalf Of, you will receive the success or failure email notification, informing you of the transaction status. The individual you have designated as the Send on Behalf Of recipient will receive all further transaction email notifications.

Events in the [Audit Trail](#) are updated to reflect any transactions that are sent using the Send on Behalf Of feature.

Transaction ID	
36v6am8ak3mepssytp80ftwu73buj706jmpz9vr0jkv7hbp78l	
Transaction Status	
COMPLETE - 10/26/2021	
File Name	File Hash
LoremIpsum.pdf	58203576f3dc4b8ff6fb2c3d50a01cb2970b3ae970abee34e734fa60ba77866c
Full Audit Trail	
ACTIONS	
	Transaction was created by User User <senderexample@>.
	Transaction was sent by User User on behalf of Blue Cube Team <soboexample@>.

- ⚠ Replying to a received Send on Behalf of email may cause responses to be caught by specific spam filters that are looking for emails that have different "reply-to" and "from" email addresses.

Conga Sign Transaction records display the Send of Behalf of User's information in two fields.

- **Send on Behalf Of Name:** the name of the User the transaction is sent on behalf of.
- **Send on Behalf Of Email:** the email of the User the transaction is sent on behalf of.

- ℹ If you have directly installed Conga Sign v 1.74.0, these fields will already exist on the page layout. If you have upgraded from a previous version to 1.74.0, you will need to add the fields to your page layout manually.

## Configuring Send on Behalf of using Business Units

1. Navigate to Conga Sign Setup.
2. Select the Business Units option and click **Add New Business Unit**.
3. Set the name for your Business Unit as Send on Behalf Of, or any name of your choice, and the API name will autofill as you type. Click **Save**.
4. Under the input section for Send on Behalf Of, add the Name and Email of the User's name you want to send information on behalf of.

- ⚠ Only one user can have transactions sent on their behalf.

When you create a transaction, you will be able to select your new option from the **Choose Business Unit** dropdown.

**Choose Business Unit**

Send on Behalf Of ▼

## Configuring Send on Behalf of using Send with Conga Sign

1. Navigate to Salesforce Setup.
2. In Setup, navigate to an object where [Conga Sign is configured](#). (For example, navigate to Opportunity.)
3. Click **Edit** on the **Send with Conga Sign** button.
4. Add either the &businessUnit parameter or the &sendonbehalfname and &sendonbehalfemail parameters. See [Conga Sign Parameters](#) for more details.

## Configuring Send on Behalf of using Conga Composer Integration

Conga Composer utilizes two parameters to integrate with Conga Sign's Send on Behalf Of feature.

- **&cssendonbehalfname:** the name of the User the transaction is sent on behalf of.
- **&cssendonbehalfemail:** the email of the User the transaction is sent on behalf of.

For details on how to add parameters to Conga Composer buttons, refer to [Conga Sign Composer Integration](#).

## Sending Transactions from Conga CLM

Conga Sign can be used from a Conga CLM Agreement. Once an Agreement Status is In Signature or Ready for Signature, the **Send for Conga Sign** action is available to use in the Agreement Lifecycle Actions panel.

For more information, see [Enabling and Customizing the Action Panel](#) for CLM.

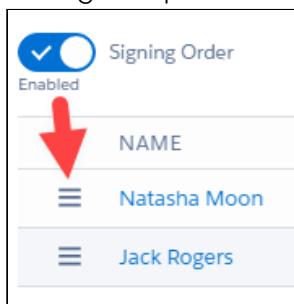
## To send documents for eSignature

1. Click **Send for Conga Sign** in the Agreement Lifecycle Action panel.
2. Select agreement documents and related agreement documents and click **Next**.
3. (Optional) **Add Documents**
  - a. You can search for a file in Salesforce. Search look at all the Files in your Org.
  - b. Click **Upload File** to upload any Word or PDF file. You can also drag and drop the file.

- c. **Available Documents** list shows all documents attached to that record. Select the documents that you want to send for eSignature. You can select multiple documents.
- d. To sequence, drag documents into the correct order use the icon (≡) on the left.
- e. To display only selected documents in the Available Documents list, click the toggle for **Only Show Selected** to enable it.

#### 4. Add Recipients.

- a. Search for Salesforce Contacts, Leads, or Users within Salesforce.
- b. If the Recipient is not a Contact, Lead, or User in Salesforce, click **Create New Recipient** and complete the required fields to add a non-Salesforce Recipient. For more information about creating a new Recipient in a Conga Sign Transaction, see [Creating New Recipients in Create Transaction UI](#).
- c. Configure optional features:



- Customize **Role**, **Language**, and **Authentication**, for each Recipient. For more information on setting up authentication, refer to [SMS Authentication](#).
- Enable **Signing Order** if you want the document to be signed by recipients in a specific order. To sequence, drag signers into the correct order using the icon (≡) on the left.

#### 5. Advanced Options

- a. Compose a customized Subject and Message. If none is provided, a default is used.
- b. Set the date and time for transaction expiration and reminders if desired. You can configure the following fields:
  - **Transaction Expiration**- Select the date and time when you want the transaction to expire. After the transaction is expired, the signer receives an email notification.
  - **Expiration Reminder** - Select the date and time when you want to send a reminder to the signer about the expiration of the transaction.
  - **Request Reminder** - Enter the number of days in which you want to send a reminder to the signer after you send the document. For example, you send

the document today and you enter the value as 5. A reminder will be sent to the signer after 5 days.

6. If tags exist, click **Send Now**.
7. If you need to add tags or preview, click **Preview and Tag**.
  - a. Tag the document with signature fields, initial fields, or any other fields you require. Documents requiring more than one signer have an extra bar at the top of the document with color-coded names to distinguish field blocks.
  - b. Drag and Drop the blocks from the left-hand panel into the document.
  - c. In case of multiple documents, select a file name from the dropdown list at the top to navigate between the documents. The dropdown displays the file name that you are viewing as you scroll between documents.
  - d. Click **Send**.

This concludes the send for eSignature process using Conga Sign. You receive an email confirming the documents are sent and a link to the new audit trail. Your recipients are sent emails inviting them to sign the documents. Visit [Signing a Document](#) to learn about a recipient's signing experience.


Once the document has been signed and Document Versioning is enabled, it will be saved back to CLM Agreement record under the Document Version in addition to the Transaction. The Document Type of the signed document is updated as the *Executed Document*. For more information about Document Versioning, see [Contract Document Versioning](#). If the Document Versioning is disabled, it will be saved back to the CLM Agreement record to Files or Notes & Attachments in addition to the Transaction. All smart clauses are marked as Final in the Agreement Clauses section.

## Signing a Document


The signing process begins when you receive an email notification from Conga Sign informing you that you have a document to sign. Conga Sign sends the email notification on behalf of the sender and contains a message from the sender and a link to open the document. If the sender has sent multiple documents for signing, the email subject contains the first document name of the document package and the email body contains a list of document names. To begin the signing process, you must open the document and review the electronic record and signature disclosure. You must agree to use electronic records and signatures to sign the document. You must complete each Conga Sign tag and add your electronic signature where required to sign or initial. Optionally, you can use the Guided Signing feature to auto-navigate to the locations of each assigned Conga Sign tag in the document. This feature is only available when the Guided Signing setting is enabled in your sender's org. After you add the required information in each Conga Sign tag and add your electronic signature, you can complete the signing process.

## To sign a document


1. Open the email you received from Conga Sign.
2. Click **View Document**. If the sender has sent multiple documents for signing, the **View Document** link opens all documents in a single transaction.
3. View the electronic record disclosure and click **I Agree**.

 Clicking **I agree** confirms that the Signer accepts the electronic record disclosure. The full electronic record disclosure is available in the eSignature Adoption and Terms portion of the signing user experience.


4. In the case of multiple documents, select a file name from the dropdown list at the top of the signing user interface to navigate between the documents. The dropdown displays the file name that you are viewing as you scroll between documents.
5. Click **Begin** to navigate to the first tag in the document.
6. After you click the **Begin** button or complete the first tag, it changes to **Next**.  
or  
After you complete any tag except the first tag, it changes to **Back** and **Next**.
7. Click **Next** to navigate to the next tag.
8. Click **Back** to navigate to the previous tag.

 Steps 5 to 8 are optional. The **Begin** button is only available when the Guided Signing setting is enabled in your sender's org. For more information on how to configure the Guided Signing setting, refer to [Setting Guided Signing](#) in *Conga Sign Administrator Guide*. If the Guided Signing setting is disabled, you are automatically navigated to the next tag after completing the first tag. In the case of multiple document signing, you are automatically navigated to the next document after all tags of the previous document are navigated.

9. Customize or draw your Signature and Initials if Signature or Initials tag is present. Alternatively, you can select Upload your Own to upload an image of your signature or initials.
10. Click **Adopt Signature and Sign**.
11. Click on each Conga Sign tag to complete the tags. Date fields are automatically populated. Additional fields, such as title, email, or company, are updated by typing text values into the fields directly.

 If a Stamp tag has been added, click the Stamp tag to give it a name and upload your signature Stamp. Optionally, you may mark a stamp as your default Stamp. Click **Adopt and Sign**.

12. Click **Complete Signing** once all tags are complete.
13. The signing process is complete. If all recipients have finished signing, you can click **Download Document** to save a copy if you choose.

 If multiple documents are signed in a single transaction, **Download Document** downloads a .zip file containing all of the signed documents.


You receive another email when all requested signatures are collected. This email contains a link to the audit trail as well as a PDF attachment of the fully executed document. For multiple document signing, all PDF attachments signed for a transaction are included in the email.

## Using Signature Image Upload

With Conga Sign Signature Image Upload, you are able to upload your own customized signatures and initials to be used as a signature for a transaction. This topic instructs you on how to upload your own custom Signature and Initial images.

### To sign a document with Signature Image Upload

1. Open the email you received from Conga Sign.
2. Click **View Document**. If the sender has sent multiple documents for signing, the **View Document** link opens all documents in a single transaction.
3. View the electronic record disclosure and click **I Agree**.

 Clicking **I Agree** confirms that the Signer accepts the electronic record disclosure. The full electronic record disclosure is available in the eSignature Adoption and Terms portion of the signing user experience.

4. In the case of multiple documents, select a file name from the dropdown list at the top of the signing user interface to navigate between the documents. The dropdown displays the file name that you are viewing as you scroll between documents.
5. Select **Upload your Own**, then drag and drop the image of your Signature and Initials from your saved location, or click the Browse Files buttons to select them from your stored file location. If there is no Initials tag in the Sign Document, you are not required to upload an image for it.

**i** A Signature/Initials image uploaded this way will remain saved and will be available to use for subsequent transactions. As long as you are within the same region in Conga Sign Setup, it will be available to use with future transactions.

6. Click **Adopt Signature and Sign**, then click on each Conga Sign tag to complete the tags. Date fields are automatically populated. Additional fields, such as title, email, or company, are updated by typing text values into the fields directly.
7. Click **Complete Signing** once all tags are complete.
8. The signing process is complete. If all recipients have finished signing, you can click **Download Document** to save a copy if you choose.

## Techniques to make your images their best

To get your Signature image to look how you would like and to fit them to the image sizes, you can try the following techniques in your photo application of choice:

1. Change the dimensions of the images to fit within the recommended sizing - *400 x 150* pixels for Signature images and *150 x 150* pixels for Initials images.
  - a. Typically images can be adjusted either by pixels or by percentage.
  - b. When adjusting your image, it is recommended that you resize proportionally to keep the integrity of the image.
2. Rotate the image so it applies to the document in a way that represents your natural signature. You can use the Windows Photos application or the Paint tool, or the Apple Preview tool to resize and modify an image.
3. Images must be .png, .jpg, .gif, .ipx or .bmp file format. Your maximum file size cannot be greater than 300kb.



## In Person Signing

### In Person Signing Functionality

Use Conga Sign to capture signatures while in person with your prospects, customers, and partners at any time without the need to send an email invitation. In Person Signing Transactions bypass the standard email functionality, allowing users to expedite the signing experience without needing to access their email. In Person Signing functionality is useful for scenarios that require a signed document on the spot, such as trade shows, door to door sales, and on-site visits. In Person Signing feature is compatible with the Salesforce1 Mobile App, Salesforce Classic, and Salesforce Lightning, allowing users to easily create In-Person Signing Transactions on smartphones, tablets, and laptops.

### In Person Signing Roles

In Person Signing feature requires two different roles for each In Person Signing Transaction: the In Person Signer and the Facilitator. The Signer role is also available for assignment in an in person transaction but is not required.

### In Person Signer

The In Person Signer is the recipient signing a Conga Sign document in person. The In Person Signer Role designates the Conga Sign transaction as a In Person Signing Transaction, rather than the default email-based Transaction. This role is required to create the In Person Signing transaction. An In Person Signer must be an existing Contact, Lead, or User record with a valid email address.

The In Person Signer is always the first signer required to complete their assigned Conga Sign tags, and as such Conga Sign requires Serial Routing order for this feature. Any additional Signers defined in an In Person Signing Transaction must complete their assigned tags after the In Person Signer completes their portion of the Transaction.

## Facilitator

The Facilitator is the Salesforce user that created the In Person Signing Transaction and is responsible for conducting the in person signing. The Facilitator role is automatically populated once the In Person Signer role is assigned to a recipient. This role is assigned to the running Salesforce user that designated the In Person Signer role. Users must assign the In Person Signer role before the Facilitator role is assigned. Only one Facilitator is allowed for each Sign In Person Transaction.

A Facilitator is responsible for physically handing the device to the In Person Signer and guiding them through the In Person Signing transaction. The Facilitator is not considered a signer in the Transaction and therefore cannot have Conga Sign tags added or assigned for that role. However, the running Salesforce User is available to add as a Signer to the Transaction in addition to their Facilitator role. Facilitators will not receive a "Transaction Sent" email notification, as there is no need for the role to receive one.

## Signer (optional)

The Signer is a recipient responsible for signing the Conga Sign document over email. This role is not required for an in person transaction. A Signer is emailed the Conga Sign Transaction after the In Person Signer completes their assigned tags. Users can easily define the signer order for additional Signers when creating the In Person Signing Transaction. In Person Signing functionality is not yet available for Conga Sign-integrated Composer solutions.

## To create an In Person signing transaction

1. Navigate to an object record in Salesforce and click the **Send with Conga Sign** button to launch Conga Sign.
2. Select a Conga Sign document.
3. Add a **Recipient** to the Conga Sign transaction.
4. Click the **Role** dropdown field and change the Recipient's role from Signer to In Person Signer.

**Add Recipients**  
You must select an existing Contact, Lead, or User. Email addresses are not allowed.

Search by Name or Account

☒ Signing Order \* In Person transactions require a signing order.

NAME	EMAIL	COMPANY	TITLE	ROLE
John Bond	bond_john@grandhotels.com	Grand Hotels & Resorts Ltd	VP, Facilities	In Person Signer
Amanda Knapp	leancat.vdusja65@mailosaur.io	Conga	Sales Representative	<div>           Signer            ✓ In Person Signer            CC         </div>

Changing a Recipient to an In Person Signer role automatically adds the running Salesforce user as the Facilitator role.

**Add Recipients**  
You must select an existing Contact, Lead, or User. Email addresses are not allowed.

Search by Name or Account

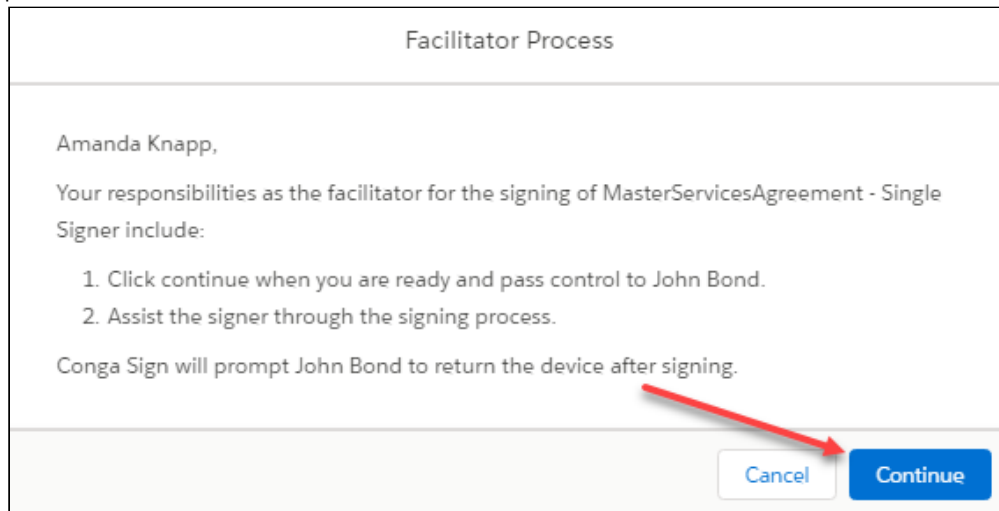
☒ Signing Order \* In Person transactions require a signing order.

NAME	EMAIL	COMPANY	TITLE	ROLE
John Bond	bond_john@grandhotels.com	Grand Hotels & Resorts Ltd	VP, Facilities	In Person Signer
Amanda Knapp	leancat.vdusja65@mailosaur.io	Conga	Sales Representative	Facilitator

5. Click **Begin In Person Signing**.
  - a. If the Conga Sign document is pre-tagged, click the **Begin In Person Signing** button to begin the transaction.
  - b. If a user needs to add tags to the Conga Sign document, click **Preview and Tag**. After adding tags to the document, click **Begin In Person Signing** button from the tagging user interface to begin the transaction.

## To facilitate and complete an In Person Signing transaction

1. The Facilitator is prompted to review the role's responsibilities. Click **Continue** to proceed with the transaction.



**Facilitator Process**

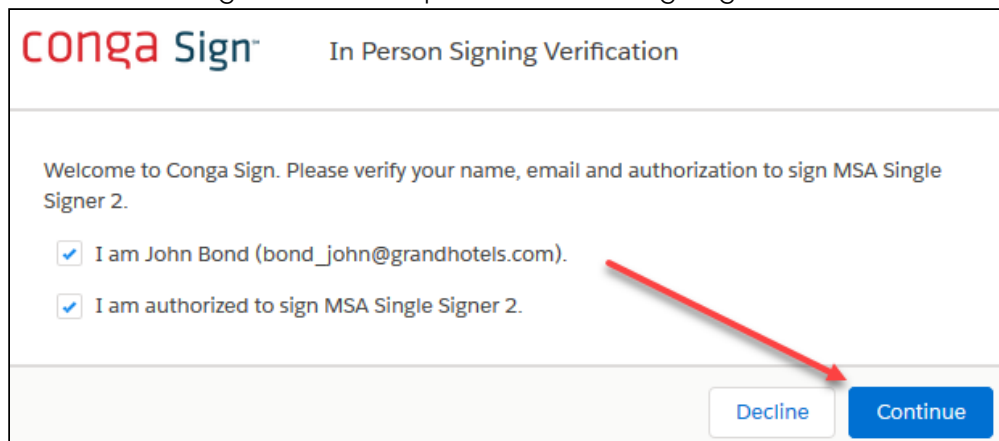
Amanda Knapp,

Your responsibilities as the facilitator for the signing of MasterServicesAgreement - Single Signer include:

1. Click continue when you are ready and pass control to John Bond.
2. Assist the signer through the signing process.

Conga Sign will prompt John Bond to return the device after signing.

2. Pass the device to the In Person Signer.
3. The In Person Signer must complete In Person Signing Verification and click **Continue**.



**conga Sign** In Person Signing Verification


Welcome to Conga Sign. Please verify your name, email and authorization to sign MSA Single Signer 2.

☒ I am John Bond (bond\_john@grandhotels.com).

☒ I am authorized to sign MSA Single Signer 2.

4. Click **I Agree** to agree to the electronic disclosure and begin In Person Signing. Clicking **I Agree** confirms that the In Person Signer accepts the electronic record disclosure. The full electronic record disclosure is available in the eSignature Adoption and Terms portion of the signing user experience.
5. Click **Begin** to navigate to the first tag in the document.
6. After you click the **Begin** button or complete the first tag, it changes to **Next**.  
or  
After you complete any tag except the first tag, it changes to **Back** and **Next**.

7. Click **Next** to navigate to the next tag.
8. Click **Back** to navigate to the previous tag.

 Steps 5 to 8 are optional. The **Begin** button is only available when the **Guided Signing** setting is enabled in your facilitator's org. If the Guided Signing setting is disabled, you are automatically navigated to the next tag after completing the first tag.

9. Customize or draw your Signature and Initials if Signature or Initials tag is present.
10. The In Person Signer must complete all assigned and required Conga Sign tags, then click **Complete Signing**.
11. The In Person Signer hands the device back to the Facilitator.
12. (Optional) If another In Person Signer is present, the Facilitator clicks Continue and hands the device to the next signer. The next In Person Signer then completes steps 8 - 12.
13. The In Person Signer hands the device back to the Facilitator.
  - a. Click **Complete Signing** and Salesforce will redirect back to the related object record.

The transaction is complete if there are no other Signers for the transaction. Confirmation emails with the attached signed document are sent to both the Facilitator and In Person Signer once the transaction is complete.

## Canceling a Conga Sign Transaction

Conga Sign allows users to easily cancel a Conga Sign Transaction. Follow the steps below to cancel a Conga Sign Transaction.

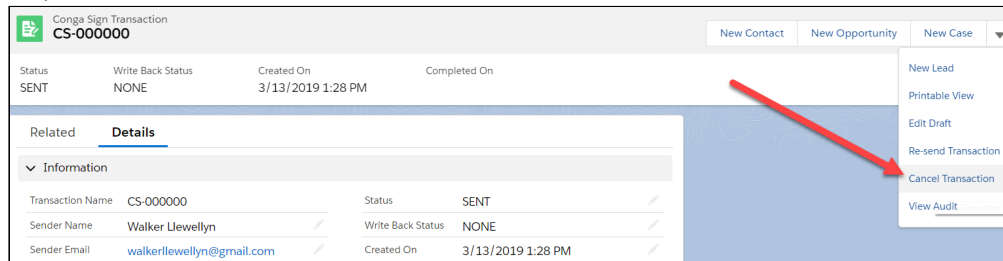
### To cancel a Conga Sign Transaction as a Salesforce User

1. After sending the Conga Sign Transaction, navigate to the related Conga Sign Transaction record and click the Transaction name.

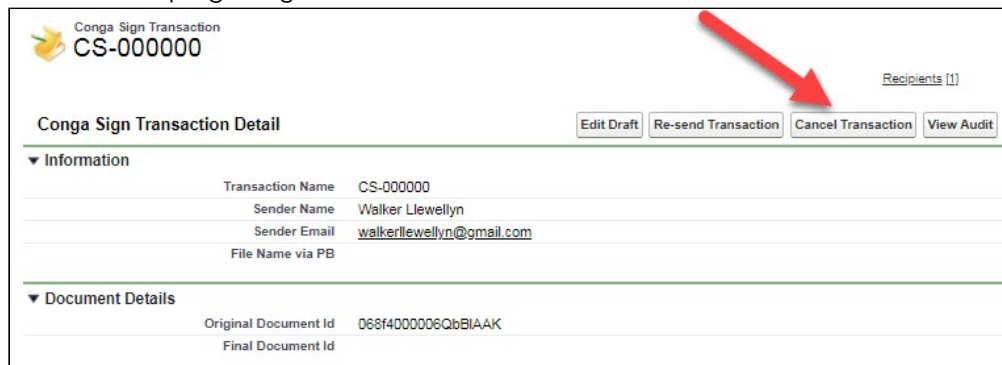
Conga Sign Transactions (6+)		
TRANSACTION NAME	SENDER NAME	STATUS
<a href="#">CS-000241</a>	Walker Llewellyn	SENT

2. Click **Cancel Transaction**.

- In Lightning, the Cancel Transaction button is located in the Lightning buttons dropdown list.

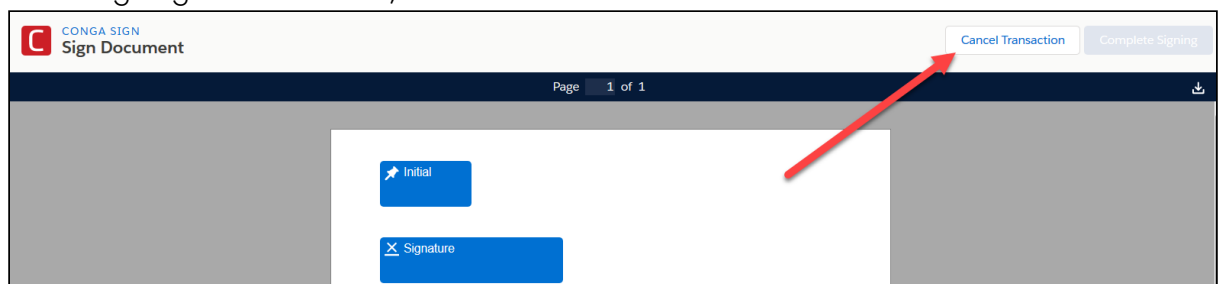


- In Classic, the Cancel Transaction button is located on the Conga Sign Transaction page layout as a button



## To cancel a Conga Sign Transaction as a Signer

1. Open the initial Conga Sign Transaction email and click the **Begin Signing** button.
2. Complete the Full Name and Initials fields and click the **Agree and Start Signing** button.
3. In the Signing user interface, click the **Cancel Transaction** button.



4. Enter a short description for cancellation in the text box and click the **Confirm** button to execute the cancellation.


⚠ After canceling as either a Salesforce user or Signer, an email is sent to all parties in the related Transaction notifying them of the cancellation. The Conga Sign Transaction record's Status field's value also updates to Canceled.

## Frequently Asked Questions

- At what point can a user no longer cancel a Conga Sign Transaction?  
A Conga Sign Transaction cannot be canceled once it is Completed or Canceled. Users may cancel a Conga Sign Transaction at any point before the Transaction is Completed.
- As a Salesforce User sending a Conga Sign Transaction, where can I cancel the Transaction?  
The sender can only cancel the transaction from the "Cancel Transaction" button on the Conga Sign Transaction record.
- As a Signer, where can I cancel the Transaction?  
Signers can cancel the transaction after clicking the Begin Signing button in the invitation email and then clicking the Cancel button in the Signing user interface.
- Does deleting a Conga Sign Transaction record cancel the Transaction?  
No, deleting a Conga Sign Transaction record does not cancel the Transaction.
- Can a Recipient with a Signer Role of 'CC' cancel a Conga Sign Transaction?  
No, a Recipient must have a Signer Role of 'Signer' to cancel a Conga Sign Transaction.

## Cancel Conga Sign Transactions in Bulk

Conga Sign provides users the capability to cancel Conga Sign Transaction in bulk by leveraging Apex code. Specifically, Salesforce administrators and developers can use the `aptx_cancelTransactionsInvocable` Apex Class as a sub Flow within a Process Builder or Flow solution to trigger bulk transaction cancellations.


 The `aptx_cancelTransactionsInvocable` Apex Class appears as Cancel Conga Sign Transactions when selecting it as in Apex Action in Flow Builder.

Additionally, administrators and developers can leverage the `apxt_bulkTransactionService` Apex Class to trigger bulk cancellations through the REST API.

Located below are tips, recommendations, and examples on using Apex to cancel Conga Sign Transactions in bulk.

## Bulk Cancellation Scenarios Using Process Builder to Manage Conga Sign Transactions

1. Cancel any incomplete Conga Sign Transactions when a Campaign status changes to Complete.
2. Cancel any incomplete Conga Sign Transactions when an Opportunity is Won.
3. Cancel any incomplete Conga Sign Transactions when a Campaign Offering Price change occurs.
4. Cancel related Conga Sign Transactions when one Conga Sign Transaction is completed.

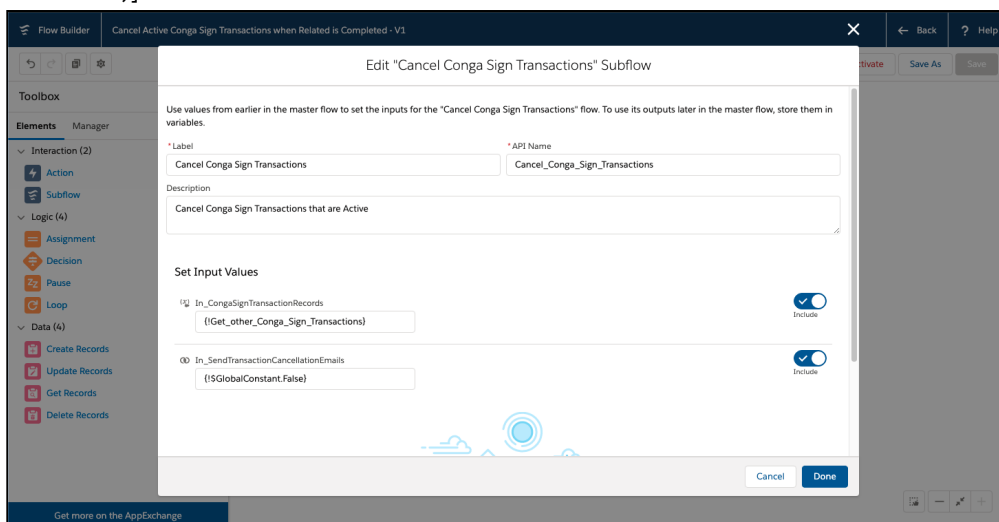
 Salesforce solutions, such as Process Builder and Flows, leveraging Apex code are outside of the scope of Conga Support. It is highly suggested to only create custom solutions leveraging Apex Classes if you have prior experience with using Apex in Salesforce.

## Common Steps to Manage and Bulk Cancel Conga Sign Transaction with Process Builder

1. Define a Process Builder or Flow to trigger off of data changes to the standard or custom Salesforce object data or workflow state.
2. Connect the Process Builder trigger action to the appropriate Flow for that use case.
3. Follow Salesforce [Best Practices for building Flows](#).
4. For each of the different scenarios, the input, criteria, and rules change, but the steps from a Flow perspective are the same:
  - a. A Get Records Data element that collects the Salesforce or Custom Objects and has the Conga Sign Transactions associated to it
  - b. A Loop Logic element that iterates over the gathered Salesforce or Custom Object(s)
  - c. A second Get Records Data element that finds the Conga Sign Transactions associated with the current iteration object
  - d. A second Loop Logic element that collects the Conga Sign Transaction records that should be cancelled
  - e. An Assignment Logic element that adds the record of the current iteration Conga Sign Transaction record to a Collection Variable Resource



- f. An ApexAction Interaction element that calls the Sub Flow aptx\_cancelTransactionsInvocable Apex Class (Cancel Conga Sign Transactions) and sets the Input Variables:
- In\_CongaSignTransactionRecords: [The Collection Variable containing Conga Sign Transaction Records]
  - In\_SendCancellationEmails: [GlobalConstant or some other variable containing a boolean; True (send recipients cancellation notice), False (do not send)]



- g. An optional notification

## Common Sub Flow - Send List of Transaction Ids to the Conga Sign Cancel Transaction Invocable

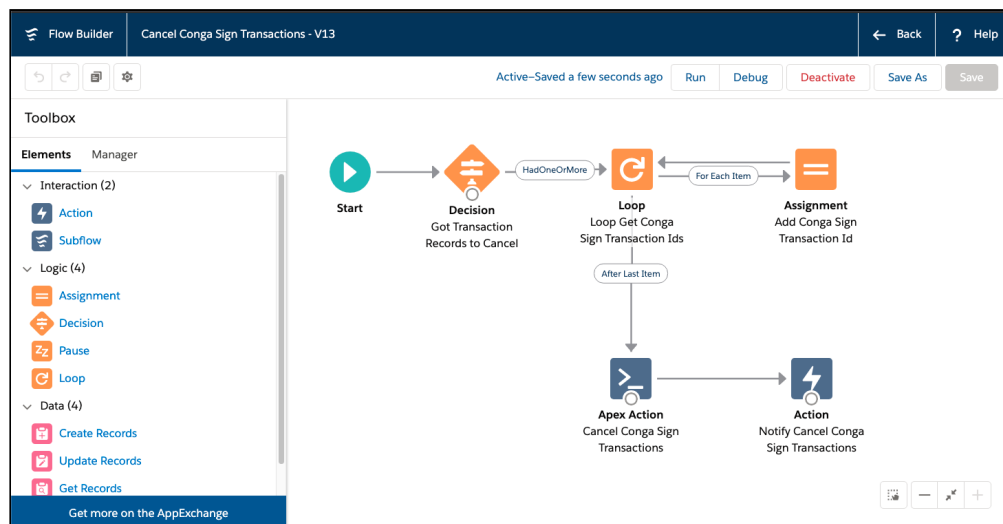
**i** This flow is used as a sub flow in each of the example use cases below. Follow Salesforce [Best Practices for building Flows](#).

1. Input a list of Conga Sign Transaction records.

**i** This list is gathered by other use case Flows as an input into this flow.

2. Add a Decision Logic element to check that the input contains records.
  - a. Add an Outcome that there are one or more records from the input and it is not null.
3. Connect Start to the Decision.
4. Add a Loop logic element to iterate over the Conga Sign Transactions.
5. Connect the Decision to the Loop using the appropriate Outcome.
6. Add an Assignment Logic element and add each Id to a Text collection variable.

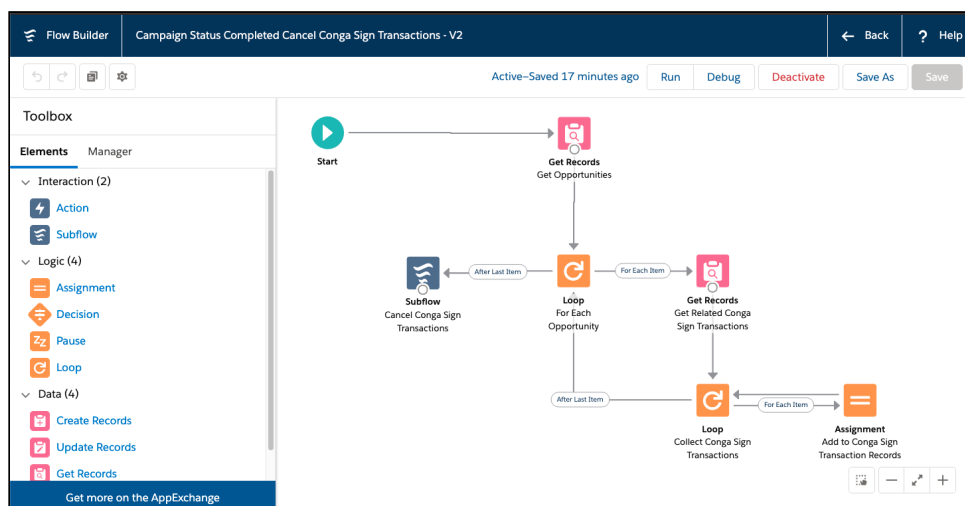
7. Connect the Loop to the Assignment with For Each Item and return from the Assignment to the Loop.
8. Add an Apex Action Interaction element that calls the Conga Sign Cancel Transactions Invocable method.
  - a. Configure the collected Conga Sign Transaction Id's as the Input Variable "Conga Sign Transaction Record Ids".
  - b. Configure either "True" or "False" for the as the Input Variable "Send Cancellation Emails". This will send cancellation emails to each recipient when set to true.
  - c. (Optional) Configure the output variables to process return value and messages. (Shown As "Notify Cancel Conga Sign Transactions").
9. Connect the Loop to the Apex Action with After Last Item.
10. Save and Activate the Flow.



## Example: Cancel Any Incomplete Conga Sign Transactions When a Campaign Status Changes to Complete

1. Create a new Process Builder.
2. Select Campaign as the object.
3. Select "when a record is created or edited" for Start the process.
4. Add Criteria:
  - a. Criteria Name: Campaign Price Changes
  - b. Criteria for Executing Actions:
    - i. Field: [Campaign].[Status]

- ii. Operator: Equals
  - iii. Type: Picklist
  - iv. Value: Completed
- c. Conditions: All of the conditions are met (AND)
- 5. Add Immediate Action:
  - a. Action Type: Flows
  - b. Action Name: Campaign Status Completed Cancel Conga Sign Transactions
  - c. Flow: Campaign Status Completed Cancel Conga Sign Transactions
    - i. Create the Flow using Common Steps, if not already created.
      1. Get all Opportunities related to the Campaign.
      2. Get all Conga Sign Transactions from the Opportunities related to the Campaign.
      3. Collect the Conga Sign Transaction Ids.
      4. Call the Cancel Conga Sign Transaction Invocable with the list of Conga Sign Transaction Ids.

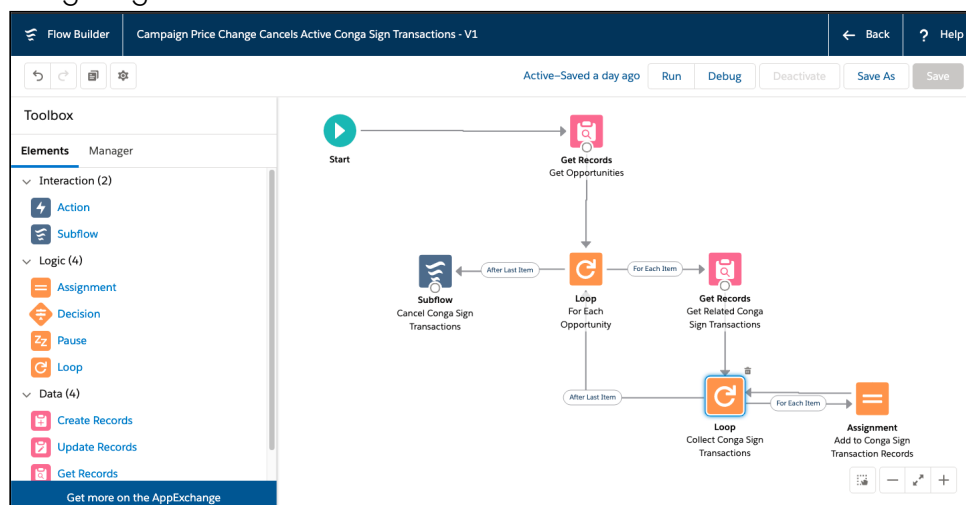


- d. Set Flow Variables.
  - i. Flow Variable: In\_CampaignRecord (the input variable you used in your flow)
  - ii. Type: Field Reference
  - iii. Value: [Campaign] (select the campaign record that started your process)
- e. Save and activate the Process Builder.

## Example: Cancel Any Incomplete Conga Sign Transactions When a Campaign Offering Price Change Occurs

1. Create a new Process Builder.
2. Select Campaign as the object.
3. Select when a record is created or edited for Start the process.
4. Add Criteria:
  - a. Criteria Name: Campaign Price Changes
  - b. Criteria for Executing Actions:
    - i. Field: [Campaign].[OfferingPrice] (Use the field you monitor for price changes)
    - ii. Operator: Is Changed
    - iii. Type: Boolean
    - iv. Value: True
  - c. Conditions: All of the conditions are met (AND)
5. Add Immediate Action:
  - a. Action Type: Flows
  - b. Action Name: Campaign Price Change Cancel Conga Sign Transactions
  - c. Flow: Campaign Price Change Cancel Conga Sign Transactions
    - i. Create the Flow using Common Steps, if not already created.
      1. Get all Opportunities related to the Campaign.
      2. Get all active Conga Sign Transactions from Opportunities related to the Campaign.
      3. Collect the Conga Sign Transaction Ids.

4. Call the Cancel Conga Sign Transaction Invocable with the of Conga Sign Transaction Ids.



- d. Set Flow Variables:

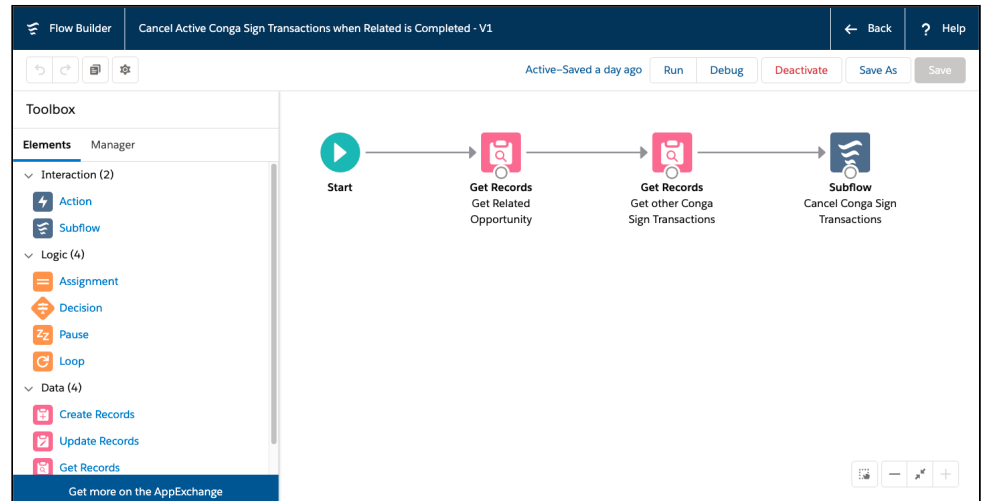
- i. Flow Variable: In\_CampaignRecord (the input variable you used in your flow)
- ii. Type: Field Reference
- iii. Value: [Campaign] (select the campaign record that started your process)

6. Save and activate the Process Builder.

## Example: Cancel Related Conga Sign Transactions When One Conga Sign Transaction Is Completed

1. Create a new Process Builder.
2. Select Conga Sign Transaction as the object.
3. Select when a record is created or edited for Start the process.
4. Add Criteria:
  - a. Criteria Name: Conga Sign Transaction Completed
  - b. Criteria for Executing Actions:
    - i. Field: [Transaction\_\_c].[Status\_\_c]
    - ii. Operator: Equals
    - iii. Type: Picklist
    - iv. Value: COMPLETE
  - c. Conditions: All of the conditions are met (AND)
5. Add Immediate Action:
  - a. Action Type: Flows
  - b. Action Name: Cancel Related Conga Sign Transactions
  - c. Flow: Cancel Related Conga Sign Transactions
    - i. Create the flow using Common Steps if not already created.

1. Get all Active Conga Sign Transactions related to the Opportunity.
2. Collect the Active Conga Sign Transaction Ids.
3. Call the Cancel Conga Sign Transaction Invocable with the list of Active Conga Sign Transaction Ids.



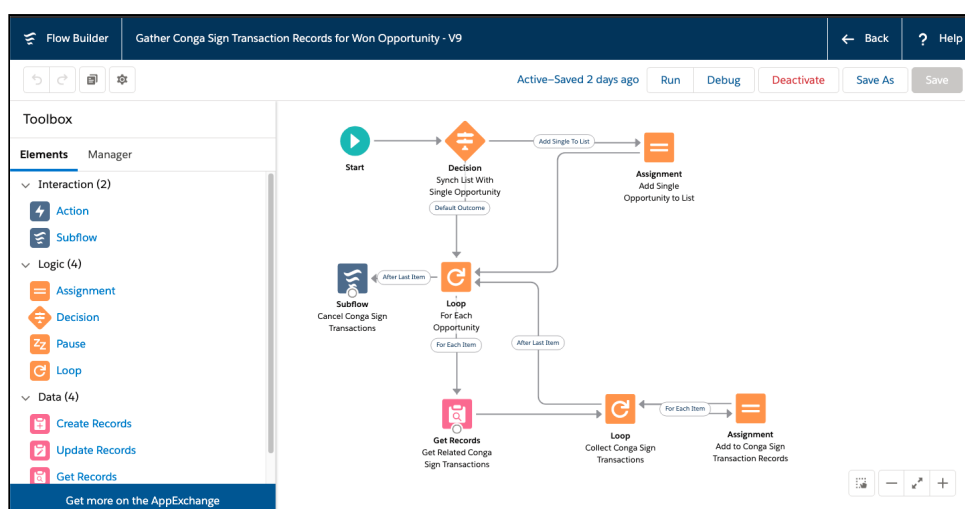
- d. Set Flow Variables:
  - i. Flow Variable: In\_CongaSignTransactionRecord (the input variable you used in your flow)
  - ii. Type: Field Reference
  - iii. Value: [Transaction\_\_c] (select the Conga Sign Transaction record that started your process)

6. Save and activate the Process Builder.

## Example: Cancel Any Incomplete Conga Sign Transactions When an Opportunity Is Won

1. Create a new Process Builder.
2. Select Conga Sign Transaction as the object.
3. Select when a record is created or edited for Start the process.
4. Add Criteria:
  - a. Criteria Name: Is Opp Won
  - b. Criteria for Executing Actions
    - i. Field: [Opportunity].[Won]
    - ii. Operator: Equals
    - iii. Type: Boolean
    - iv. Value: True

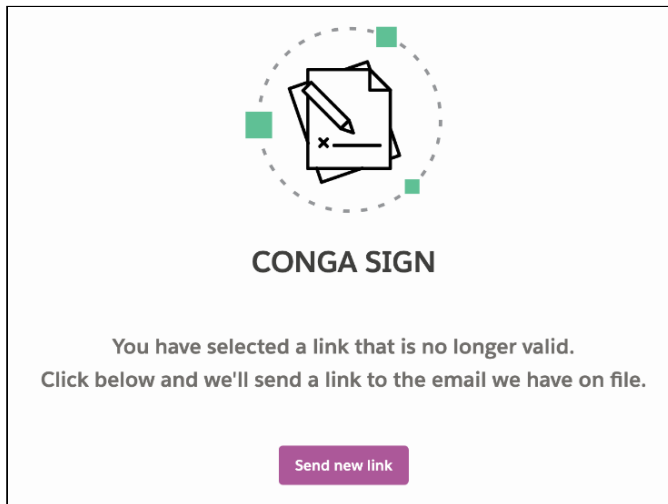
- c. Conditions: All of the conditions are met (AND)
- 5. Add Immediate Action:
  - a. Action Type: Flows
  - b. Action Name: Gather Active Conga Sign Transactions
  - c. Flow: Gather Conga Sign Transaction Records for Won Opportunity
    - i. Create the flow using Common Steps if not already created
      - 1. Get all Active Conga Sign Transactions related to the Opportunity.
      - 2. Collect the Active Conga Sign Transaction Ids.
      - 3. Call the Cancel Conga Sign Transaction Invocable with the list of Active Conga Sign Transaction Ids.




- d. Set Flow Variables
  - i. Flow Variable: In\_AnOpportunity (the input variable you used in your flow)
  - ii. Type: Field Reference
  - iii. Value: [Opportunity] (select the Opportunity record that started your process)
- 6. Save and activate the Process Builder.

## Conga Sign Link Expiration

To better secure documents, Conga Sign automatically expires signing links after 5 days. Recipients that access an expired link can click **Send new link** to send a new signing link to their email address.



 The Signing user interface times out after 1 hour. After 1 hour, Recipients must refresh the browser to complete their signing portion.

## Conga Sign Recipient Object

The Conga Sign Recipient object is accessible from the [Audit Trail](#) and provides key details for Recipients related to a specific Conga Sign Transaction.

Salesforce users can access Recipients related to a Conga Sign Transaction by using the Recipients Related List on a Conga Sign Transaction record. Recipient records are also accessible from the Recipients object tab.

## Recipient Fields

Recipient object records contain the following fields:

- Recipient Name
  - An auto-assigned record name
  - This is the name of the Recipient record in Salesforce. It is not the name of the actual Recipient
- Signer Index
  - The assigned signer order for a Recipient
- UUID
- Recipient Status
- Conga Sign Transaction
  - Lookup field to the related Conga Sign Transaction



- Name
- Initials
- Email
- Title
- Company
- Signed On
  - The date the recipient signed the Conga Sign document
- Decline Reason
- Created By
  - Date and time when the Recipient is added to a Transaction as a Recipient
- Last Modified By
  - Date and time the Recipient record is last updated

## Recipient Status

The Recipient Status field displays the current status of a Recipient related to a Transaction by displaying the field values below:

- COMPLETE
  - The Recipient completed their portion of the Conga Sign Transaction.
- PENDING
  - An invitation to sign has not yet been sent to this Recipient.
- SENT
  - The Conga Sign Transaction email is sent to the Recipient although they have not viewed the Conga Sign document.
- VIEWED
  - The Recipient viewed the Conga Sign document but has not completed their portion of the Conga Sign Transaction.
- DECLINED
  - The Recipient declined the Conga Sign Transaction.
- CANCELLED
  - The Salesforce user (who sent the Conga Sign Transaction) canceled the Conga Sign Transaction.
- EXPIRED
  - The Recipient did not complete the Conga Sign Transaction before the defined expiration date.
- AUTHENTICATION FAILED
  - The Recipient did not successfully complete SMS Authentication.

## Reassigning Signers as a Recipient

Conga Sign offers recipients the flexibility to reassign a signer's designated signature tags to a different recipient after the Conga Transaction is sent. Reassigning signers is useful in scenarios where the designated signer would like to pass signature responsibilities to a different contact within their organization.

**i** The process for reassigning signers as a recipient is different than reassigning signers as a Conga Sign user. For more information on reassigning signers as a Conga Sign user in Salesforce, see [Reassigning Signers from Salesforce](#).

### To reassign a designated signer's Conga Sign tags to a different signer

1. Open the Conga Sign Transaction email as the initial designated signer.
2. Click the Click Here hyperlink next **To reassign the signer** prompt.
3. Fill out the **First Name**, **Last Name**, and **Email Address** fields to identify the new reassigned signer.
  - a. (Optional) Fill out the Optional Message field with an explanation of the document or signing responsibilities.
4. Click the **Send Now** button. A prompt appears letting the user know that the Signer Reassignment is complete.

**i** A signer can only reassign their signature responsibilities once in a Conga Sign Transaction. Once reassigned, that specific set of signature responsibilities cannot be reassigned again.

After an initial designated signer reassigns signature responsibilities to a new signer, the new signer receives a new Conga Sign Transaction email prompting them to complete the signature tags.


The Conga Sign user who sent the transaction and the initial signer both receive confirmation emails detailing the successful reassignment of the signature responsibilities. The new reassigned signer also receives all standard email notifications related to the Transaction moving forward.

New reassigned signers are added and accounted for in the Conga Sign Transaction record and the related Audit Trail. If a signer reassigns their signature responsibilities to a new signer, their status is marked as DECLINED on the Conga Sign Transaction record. The new reassigned signer has a status of Recipient status of SENT until they complete the assigned Conga Sign tags.

## Reassigning Signers from Salesforce


Conga Sign offers users in Salesforce the option to reassign a signer's designated signature responsibilities to a different recipient after the Conga Transaction is sent. Reassigning signers is useful in scenarios where a Conga Sign user wants to designate signature responsibilities to a different person within their Salesforce org.

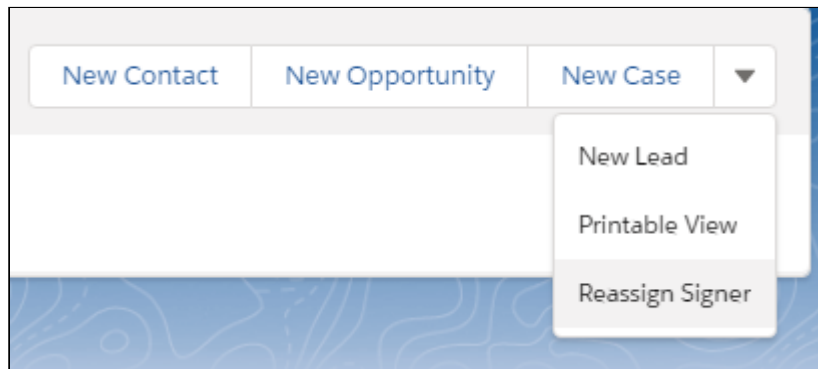
 If you are not able to see the Reassign Signer button, contact your administrator. The administrator must add the Reassign Signer button. For more information, refer to [Adding Reassign Signer Button](#).

 The process for reassigning signers from Salesforce is different than reassigning a signer as a recipient. For more information on reassigning signers as a recipient, see [Reassigning Signers as a Recipient](#).


## To reassign a signer from Salesforce

1. Navigate to the specific **Conga Sign Transaction** record in Salesforce.
2. Locate the related **Recipient** record on the Conga Sign Transaction record and click the **Recipient Name** hyperlink.
3. Click **Reassign Signer**.

 In Salesforce Lightning, you must click the drop-down option in the top-right corner to select the Reassign Signer action.



4. Complete the reassignment fields pertaining to the new signer:
  - a. First Name
  - b. Last Name
  - c. Email Address
  - d. (Optional) Language
  - e. (Optional) Message
5. Click **Send Now**.

 Conga Sign users can only reassign a recipient's signing responsibilities one time in a Conga Sign Transaction. Once reassigned, that specific set of signing responsibilities cannot be reassigned again.

After a Conga Sign user in Salesforce reassigns signature responsibilities to a new signer, the new reassigned signer receives a Conga Sign Transaction email prompting them to complete the signature tags.

The Conga Sign user who sent the transaction, and the initial signer, both receive confirmation emails detailing the successful reassignment of the signature responsibilities. The new reassigned signer also receives all standard email notifications related to the transaction moving forward.


New reassigned signers are accounted for in the Conga Sign Transaction record and the related Audit Trail. If a signer reassigns their designated signature responsibilities to a new signer, their Recipient status is marked as DECLINED on the Conga Sign Transaction record. The new reassigned signer has a status of Recipient status of SENT until they complete the assigned Conga Sign tags.

 Users cannot reassign signers from Salesforce in Conga Sign Transactions created before the Conga Sign 1.43.0 release on May 6th, 2020.

## Audit Trail

Every Conga Sign transaction contains a unique audit trail providing detailed information about events related to that specific transaction. The audit trail history contains information including:

- The document's filename
- The transaction status (Sent, Complete, Canceled)
- A unique transaction ID number
- The chronological record of events, including:
  - When a transaction was created
  - When the document was sent for signatures and who sent it
  - (If SMS Authentication is enabled) When an SMS code is requested and sent
  - Who viewed the document

 Signers appear in the Audit Trail as "Invitation email sent to..."  
CC recipients appear in the Audit Trail as "Invitation to view sent to..."

- Who signed the document and when did they sign it
- If an attachment was uploaded and who uploaded it
- If the transaction was canceled and when it was canceled
- If the transaction was Sent on Behalf of another User
- The unique IP Address for each event
- When a recipient accesses the download link for final document delivery
- When a download link expires and a recipient requests a new download link

## Access the Audit Trail for a Transaction

When a document is sent or signed using Conga Sign, an email confirmation containing a link to the audit trail is automatically sent to all recipients and the sender. Clicking this link will take users to a unique link containing that specific transaction's audit history.

You may also access a document's audit trail by clicking on any of the signature blocks in the PDF output.

Signers do not need to be Salesforce users to see audit history.

CONGA SIGN Transaction Audit		
Transaction ID	4iq8b1f2hpcau7urn9rpee4he4g87wftelo2unijm3kuydw01p	
File name	Basic Nondisclosure Agreement.docx.pdf	
Transaction status	COMPLETE	
File hash	d123ace741dfe89def486f47d17bbeb44a8ec36b6731102801279e564cee4946742512c9ab4eeabc64bd6a2c98d447eae12d865c2a712fe079fd359dc6d7c93	
Completed on	1/30/2018	
	IP ADDRESS	DATE
+ Transaction was created by Marianne Sheldon <marianne.sheldon@getconga.com>.	13.108.254.8, 10.152.95.149	01/30/2018 18:59:55 UTC
✉ Transaction was sent by Marianne Sheldon <marianne.sheldon@getconga.com>.	204.132.216.210, 10.152.95.149	01/30/2018 19:02:42 UTC
👁 Transaction was viewed by Jane Doe.	204.132.216.210, 10.152.94.6	01/30/2018 19:22:52 UTC
✓ Transaction was signed by Jane Doe.	204.132.216.210, 10.152.95.149	01/30/2018 19:39:28 UTC
📄 Final document was downloaded by Jane Doe.	204.132.216.210, 10.152.94.6	01/30/2018 19:41:11 UTC

⚠ Every Conga Sign transaction contains a unique audit trail providing detailed information about events related to that specific transaction.

## SMS Authentication

SMS Authentication is an optional recipient setting that adds an additional layer of identity assurance to Conga Sign by requiring signers to enter a one-time passcode delivered through SMS, prior to viewing a Conga Sign document. SMS Authentication is currently available for Salesforce integration only.

## SMS Authentication Setup

Administrators must setup SMS Authentication prior to using the feature in Conga Sign Transactions.

### To setup SMS Authentication

1. Click the **Conga Sign Setup** tab.
2. Under the **Org Configuration** section of **Conga Sign Setup**, change the **SMS Authentication** toggle from **Disabled** to **Enabled**.

**i** To use SMS Authentication, Conga Sign users must have a minimum of read access to the fields below on the Contact, Lead, and User objects.

- Contact: MobilePhone and MailingCountry
- Lead: MobilePhone and Country
- User: MobilePhone and Country

## Enable SMS Authentication for Recipients

SMS Authentication is enabled for individual recipients on the Create Transaction screen. Conga Sign users must first add a Recipient to the transaction before enabling SMS Authentication. SMS Authentication is available for Recipients with a role of Signer, In Person Signer, and CC.

### To enable SMS Authentication for a Recipient

1. Navigate to the **Create Transaction** screen.
2. Add a recipient to the transaction.
3. Change the Authentication field's value from **Standard** to **SMS**.
4. Confirm or enter the mobile phone number of the recipient.

**Add Recipients**  
You must select an existing Contact, Lead, or User. Email addresses are not allowed.

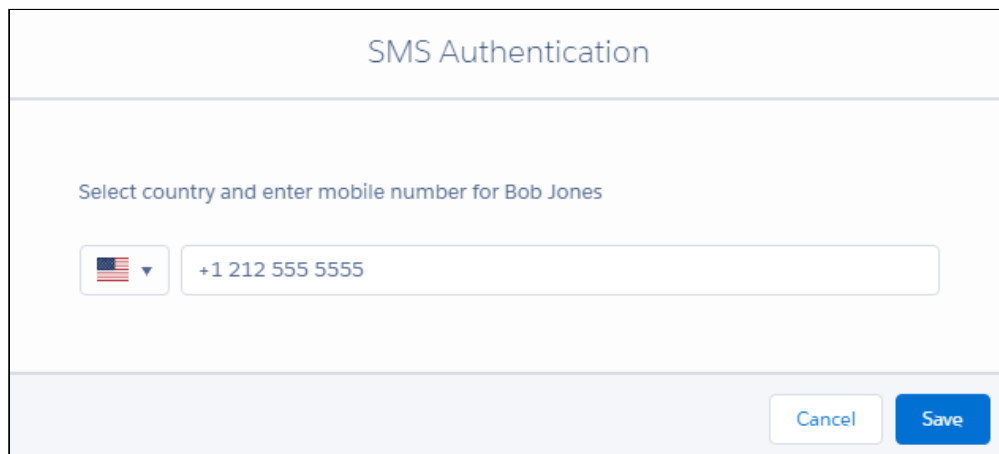
Search by Name or Account

☐ Signing Order \* No signing order specified. All recipients can sign simultaneously.

NAME	EMAIL	COMPANY	TITLE	ROLE	LANGUAGE	AUTHENTICATION
Bob Jones	jones.bob@gmail.com			Signer	English	Standard


Standard  
SMS

**i** The Recipient's phone number is automatically pulled from the Contact, Lead, or User record's standard Mobile field. If no value is entered in the Mobile field, users must enter a phone number with the appropriate country code when setting the Authentication field to SMS. A country code is required for SMS Authentication. Use the dropdown field with the flag icon to select the corresponding country code if the mobile phone number does not yet include a country code.



SMS Authentication

Select country and enter mobile number for Bob Jones

 +1 212 555 5555

Cancel Save


5. Click **Save**.
6. Click **Send Now** or **Preview and Tag** to send the transaction.

## Completing SMS Authentication as a Recipient

Once the transaction is sent to a Recipient with SMS Authentication enabled, Recipients must follow the steps below to complete SMS Authentication.

### To complete SMS authentication

1. Open the initial Conga Sign email and click **Begin Signing**.
  - Clicking the button redirects the recipient to the **SMS Authentication** page.
2. On the **SMS Authentication** page, verify that the phone number is correct and then click **Send Code**.
  - Clicking the button sends the SMS authentication code to the user's mobile phone.
  - The code is sent typically sent from a 5-digit, 6-digit, or a 10-digit phone number.

 The Recipient cannot modify the phone number that the code is sent to. If the phone number is incorrect, the Recipient must contact the Sender.

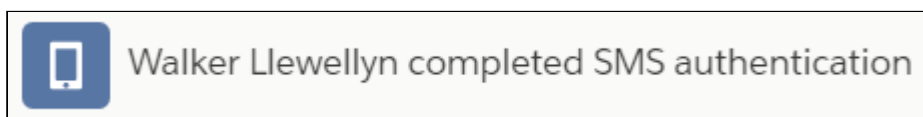
3. Enter the 6-digit code in the Authentication Code field and click **Submit Code**. Upon entering the correct code, Conga Sign redirects the recipient to begin signing the Conga Sign document.



⚠ Signers have three attempts to complete SMS Authentication. The transaction is canceled with a status of AUTHENTICATION FAILED after the third incorrect attempt. If the Recipient completes SMS Authentication successfully but does not complete signing, the Recipient must complete SMS Authentication again once they revisit the Conga Sign document. If the Recipient completes their portion of the Conga Sign transaction and revisits the document, they do not have to complete SMS Authentication again.

## Tracking SMS Authentication in the Audit Trail

SMS Authentication is displayed in a Conga Sign Transaction's Audit Trail to show if a Recipient completes or fails SMS Authentication. Successful SMS Authentication results in a transaction Status of COMPLETE. An event is also logged on the Audit Trail displaying [Recipient] completed SMS Authentication.



Failed SMS Authentication results in a transaction Status of AUTHENTICATION\_FAILED. An event is also logged on the Audit Trail displaying [User] failed SMS Authentication.



## Reassigning Signers with SMS Authentication


A Recipient with SMS Authentication specified can reassign signature responsibilities to another Recipient. In this scenario, the initial Recipient must complete SMS Authentication prior to reassigning to a new Recipient. Additionally, the initial signer must provide the new Recipient's phone number. The new Recipient must also complete SMS Authentication.

## Frequently Asked Questions

Where does Conga Sign pull the recipient's phone number used for SMS Authentication? Conga Sign automatically uses the phone number listed in the standard Mobile field on Contact, Lead, and User records.


What is the best practice for storing phone numbers used for SMS Authentication? It is best practice to add phone numbers with the country code included in the standard Mobile field on Contact, Lead, and User records. For example, a phone number from the US is stored as +17325671098 and a phone number from the UK is stored as +447921123456.

How does Conga Sign choose a country code if no country code is present in the Mobile field? If a country code is not present in the Mobile field, Conga Sign automatically uses the country code corresponding to the Recipient's country. If the Recipient's country is not present, Conga Sign uses the country code corresponding to the Sender's (the running User) country. If the Sender's country is not present, Conga Sign uses the country code corresponding to the Org's country.

 If a country is not entered correctly, Conga Sign requires the user to enter a country code on the SMS Authentication page.

## Supported Languages in Conga Sign

Conga Sign supports English (default language), French, German, Spanish (Spain), Portuguese (Brazil), Portuguese (Portugal), Dutch (Netherlands), Greek, Italian, Croatian, Polish, Ukrainian, Romanian, Georgian, Russian, Serbian (Latin), Japanese and Chinese(Simplified), Korean, Spanish - Latin American, Armenian, Bulgarian, Bosnian, British English, Norwegian, Slovenian, Turkish in the Signing user interface and [Audit Trail](#).

 Custom text, such as a Custom Email Message or Custom Tag labels, is not translated to selected languages.

Selecting a language for a Signer sets the text in the Conga Sign emails and Signing interface to the selected language. Choosing a different language on the Audit Trail displays all Audit Trail fields and events in the selected language.

For more information on selecting a language, see the documentation linked below.

- [Selecting a Language for a Recipient](#)
- [Selecting a Language as a Recipient](#)
- [Selecting a Language for the Audit Trail](#)

## Selecting a Language for a Recipient

### To select a language for a Recipient

1. Add a new Recipient or navigate to an existing Recipient on the **Create Transaction** page.
2. Use the **Language** dropdown field to select a language for the Recipient.
  - a. Repeat this step for all desired Recipients.
3. Click **Send Now** or **Preview and Tag** to proceed and send the Transaction.

## Selecting a Language as a Recipient

Recipients also have the option to change the language upon receiving the Conga Sign Transaction.

### To select a different language as a Recipient

1. Click **Begin Signing** in the Conga Sign Transaction email.
2. Confirm the **Full Name** and **Initials**, then click **Agree and Start Signing**.
3. Use the **Language** dropdown field on the top right-hand corner of the Signing user interface to select a new language. Upon selecting a different language, the Signing user interface and tags appear in the selected language.

## Selecting a Language for the Audit Trail

### To select a language for the Audit Trail

1. Navigate to a **Conga Sign Transaction** record in Salesforce.
2. Click **View Audit**.
3. Use the **Language** dropdown field on the top right on the top right-hand corner of the Audit Trail to select a language. The Audit Trail translates all fields and events to the selected language.

## Troubleshooting Topics

See the troubleshooting topics for more information.

- [Browser tabbed navigation issues](#)
- [Transactions cannot be linked to Opportunities](#)
- [Why aren't My Documents displayed on the Send with Conga Sign Screen?](#)
- [Write Back tags FAQs and Tips](#)

## Browser tabbed navigation issues

### Question or Problem

When you send a document to be signed through the Send with Conga Sign button, you are redirected to a different tab instead of the Conga Sign tab.

### Causes or Possible Causes

Tab behavior is browser-specific. The Google Chrome browser uses the default settings to navigate through tabs.

### Workarounds

How Salesforce and Conga Sign open tabs are browser-specific behavior. Ensure you have the proper settings in your browser to ensure your tabbed navigation setting is set.

## Transactions cannot be linked to Opportunities

### Issue

Salesforce does not allow the creation of a lookup related to the Opportunity Product record. Therefore, Conga Sign cannot link transactions to Opportunity Products records.

## Workaround

Attach the transactions to the parent opportunity. For example, you might see 5 transaction and 5 products in the opportunity related lists.

## Why aren't My Documents displayed on the Send with Conga Sign Screen?

### Issue

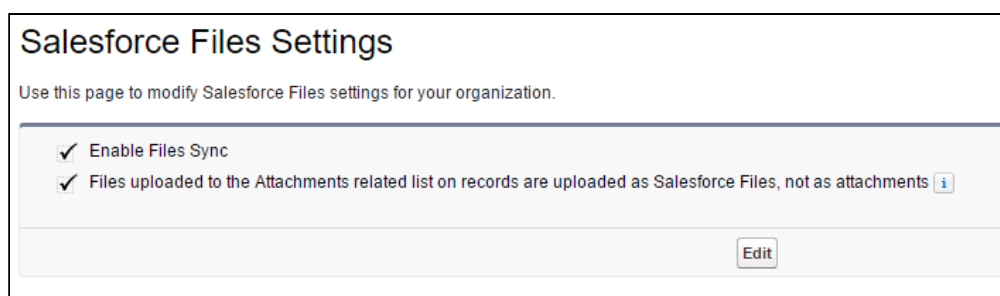
Documents don't display when trying to send with Conga Sign.

## Workaround

Follow the steps to use Attachments instead of Files.

### To configure Salesforce Files

1. In the Salesforce File Configuration box, click Configure Files Settings. The Salesforce Files Settings screen appears.
2. Select the Enable Files Sync and Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments [i](#) checkboxes.



The screenshot shows the 'Salesforce Files Settings' page. At the top, it says 'Use this page to modify Salesforce Files settings for your organization.' Below this, there are two checkboxes, both of which are checked. The first checkbox is labeled 'Enable Files Sync'. The second checkbox is labeled 'Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments' and has an information icon (i) to its right. At the bottom right of the settings area, there is an 'Edit' button.

You have successfully configured Conga Sign. Now when you visit an object record on which you utilized Conga Sign, you should see the Send with Conga Sign button and a new Conga Sign Transactions-related list.

## Write Back tags FAQs and Tips

### Frequently Asked Questions and tips

Conga Sign Write Back functionality uses Conga Sign tags to configure and map standard and custom Salesforce fields in documents. The information added by signers is sent directly to Salesforce and records are updated.

#### Can I make a write back tag optional?

Yes. From the Write Back Configuration screen, each write back field has a set of properties and can be made optional or required for the signer.

#### Does write back support picklists?

Yes, write back supports picklist fields. The supported field types are text, number, email, phone, checkbox, picklists, and URL.

#### Does write back support checkboxes?

Yes, write back supports checkbox fields. The supported field types are text, number, email, phone, checkbox, picklists, and URL.

#### Can I assign a single write back tag to multiple signers?

No. To eliminate potential conflicts with multiple signers responding to the same request for information, each write back tag can only be assigned to one signer. Determine who the best person is to provide the necessary information, and assign the tag to them.

#### Does Conga Sign Write Back support any languages other than English?

No. Conga Sign only supports English in its current state.

# Conga Sign Features by Release

Review the latest Conga Sign Features by Release document.

- [Features by Release](#)

## Features by Release

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

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