



Adobe® EchoSign®

The #1 rated eSignature application.



ADOBE ECHOSIGN FOR SALESFORCE V13

INSTALLATION AND CUSTOMIZATION GUIDE



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Adobe® EchoSign for Salesforce v13 Installation and Customization Guide

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ADOBE ECHOSIGN FOR SALESFORCE OVERVIEW

[Adobe EchoSign in Salesforce](#) is available from the AppExchange and supports Salesforce Editions:

- Professional
- Enterprise
- Unlimited
- Developer

With Adobe EchoSign, reap immediate benefits for your document and signature workflows.

- Save time and money by eliminating snail mail, overnighting, and faxing.
- Save space with digital storage instead of filing cabinets.
- Send contracts for e-signature or approval directly from Salesforce, access real-time contract history, and view saved contracts from any object
- Track deals in real-time across your organization and also get updates with Chatter when agreements are viewed, signed, cancelled, or declined.
- eSign in over 20 languages and support fax-back service in 50+ locales worldwide
- Merge Salesforce data into documents before sending and map signer data back to Salesforce objects – automatically
- Create reusable Agreement Templates for sending options and enable one-click 'Send to EchoSign' buttons to send custom agreements from any Salesforce object
- Native integrations with Conga Composer, Apttus, Selectica, Drawloop, Zuora, Emptoris, and more

Release notes for EchoSign for Salesforce v13 can be found [here](#).

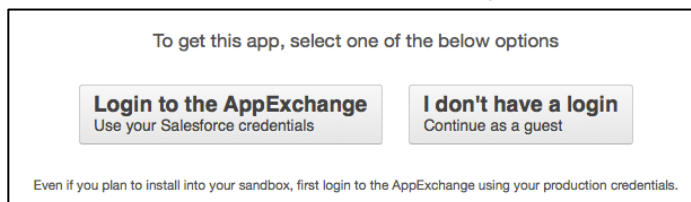
INSTALLING AND CONFIGURING ECHOSIGN FOR SALESFORCE V13

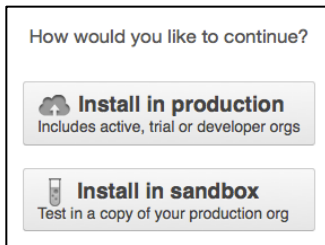
GET ECHOSIGN FROM THE APPEXCHANGE

- Click [here](#) to view the Adobe EchoSign for Salesforce AppExchange listing
- Click the 'Get It Now' button



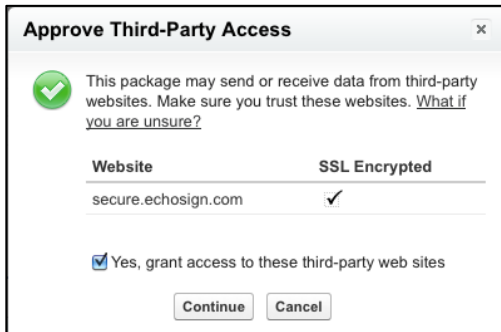
- Follow the instructions to determine where you would like to install EchoSign.



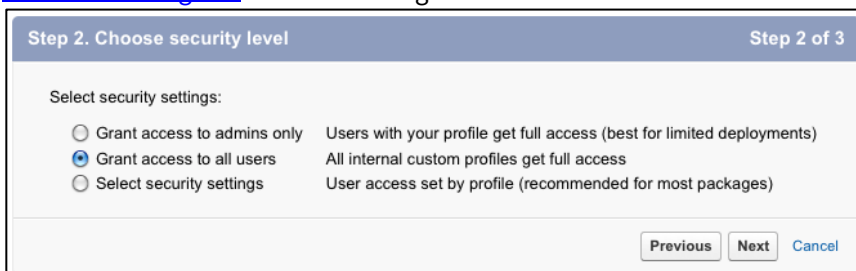


Follow the instructions to confirm and start the installation process.

- Grant access so that Salesforce can securely access EchoSign



- In 'Step 2. Choose security level', **make sure to grant access to all users.**
- **Note:** If you do not grant access to all users in your production account now, it will take additional configurations to grant them full access later on so it is recommended that you grant access to all users. For instructions on how to enable access for additional user profiles after installation, please refer to this [documentation guide](#) about extending access.



- In 'Step 3. Install package', click the 'Install' button.
- **Note:** The installation process may take some time to complete. Salesforce.com will notify you by email when it is done.
- When installation is completed, follow the [simple setup steps](#) to get started with Adobe EchoSign.

UPGRADING FROM A PREVIOUS RELEASE

EXISTING CUSTOMERS UPGRADING TO VERSION 13: PLEASE READ THIS SECTION

Each version of Adobe EchoSign for Salesforce has new features and enhancements that could provide key improvements in your document workflows. We **strongly recommend** you upgrade to the latest release, as EchoSign will be discontinuing support of older releases at a later time.

EchoSign for Salesforce version 13 can only be automatically upgraded from version 6 or later. If you have earlier versions of EchoSign for Salesforce installed or need assistance on upgrades, please contact the Client Success Manager assigned to your account or reach out to EchoSign Support.

To find the version you currently have installed, go to Setup / Deploy / Installed Packages

Action	Package Name	Publisher	Version Number
Uninstall Configure	EchoSign	EchoSign	12.10
	Description EchoSign Contract Management		



Important Upgrade Notes:

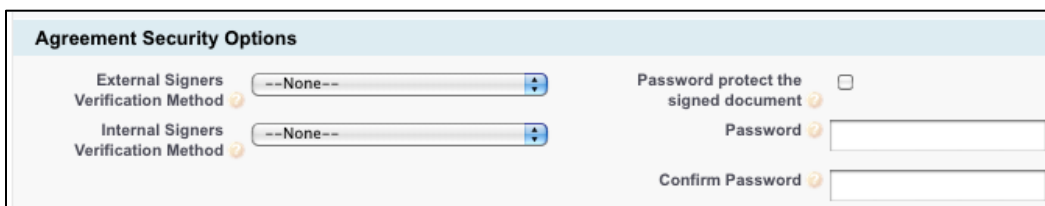
- 1) Please DO NOT un-install your existing EchoSign for Salesforce package. Uninstalling your EchoSign package will result in losing all your EchoSign data in Salesforce.
- 2) If you have users in your Salesforce Org that belong to multiple EchoSign accounts, please reach out to your EchoSign client success manager or to EchoSign Support before upgrading.
- 3) Before upgrading your production account, EchoSign recommends testing the upgrade process in your Salesforce Sandbox environment. Also, make sure your email in the Sandbox environment is a real email address that you have access to in case you need to ever change the email for your EchoSign account and verify your email address.
- 4) Keep in mind hosted agreements that were sent from older versions of Salesforce and are still out for signature during the time of upgrade, will not be able to get the status updates when they are signed after the upgrade. Please make sure agreements initiated as hosted agreements are signed before you upgrade.
- 5) Hosted agreements no longer need Sites in Salesforce. Sites are only required if you need to send file transactions larger than 2.8MB. Keep in mind Professional Edition will not support sending large files because Sites are not supported. If you previously set up Sites for hosted agreements and do not need to send larger transactions, you can deactivate the EchoSign Callback Site.
- 6) There are several new EchoSign settings that were added version 13. Make sure you review them and determine what you want to set for your Org. Below are the new settings but for a full listing of all the EchoSign custom settings, visit [this section](#) of the guide:
 - a. **Auto-Sync Group Mappings**– Check this box to automatically move the correct EchoSign groups when their Salesforce user profiles are updated.
 - b. **Disable Send Email Copies**– Check this box to hide the 'Send email copies to:' field on the send agreement page.
 - c. **Disable Knowledge Based Authentication**– Check this box to hide the Knowledge Based Authentication (KBA) identity verification option for agreements. This is a signer identity verification method that requires signers to provide and verify personal information to sign the document.

Usage of this feature is limited and may incur added costs. Also, make sure your account send settings on EchoSign.com have KBA enabled so you can use it in Salesforce.

- d. **Disable Web Identity Verification**– Check this box to hide the web identity verification option for agreements. Web identity verification requires signers to verify their identity by signing into one of the following sites: Facebook, Google, LinkedIn, Twitter, Yahoo!, or Microsoft Live. Also, make sure your account send settings on EchoSign.com have web identity enabled so you can use it in Salesforce.
 - e. **Enable Mapping Error Notification**– Check this box to send email notifications to the data mapping or merge mapping owner any time there are errors when the mappings are executed.
 - f. **Enable Recipient Approver Role**– Check this box to enable the option to mark any recipient as an Approver. Approvers review and approve the document but they are not required to sign it.
 - g. **Enable Separate Signer Identity Methods**– Check this box to enable the option to select different identity verification methods for recipients in your EchoSign account and those outside of your EchoSign account. This applies to knowledge based authentication (KBA), web identity verification, and password to sign. For example, you can require that a customer be verified with Knowledge Based Identity before signing the document but require that your sales manager instead provide a password to sign the document. If you don't check this box, then all signers or approvers will verify using the same method, as selected by the sender.
- 7) If you used Agreement Templates in v12 and want to take advantage of the new Agreement options introduced in v13, please edit the Agreement Template layout and drag the fields to the layout. Go to Setup / Create / Objects / Agreement Templates / Page Layout / (Edit) Agreement Template Layout. Add the following new fields to the Agreement Security Options section:
- a. External Signers Verification Method
 - b. Internal Signers Verification Method

Remove the 'Password to Sign Agreement' field used in v12 as the fields above replace it.

When done, the Agreement Template page 'Agreement Security Options' page should look like this:



[Learn more](#) about Agreement Templates.

- 8) The option to 'Allow Signers to Suggest Revisions' is no longer available in EchoSign.
- 9) For field values that were added to EchoSign for Salesforce version 13, Salesforce does not enable them by default when upgrading from an older version to version 13. You will need to add the following field values:

Object: Add File Attachment

Field: Attachment Type

Value to add: Quote Document from Master Quote

Object: Agreement Template

Field: Language

Values to add:

Chinese (Taiwan)

English (United Kingdom)
 Korean (South Korea)
 Polish (Poland)

Object: EchoSign File Mapping

Field: Source Type
 Values to add:
 Signed Agreement - Merged PDF
 Signed Agreement - Separate PDFs
 Supporting Documents

Object: Agreement

Field: Agreement Status
 Values to add:
 Send in Progress
 Approved
 Waiting for Counter-Approval

Object: EchoSign Form Field Import

Field: Type
 Value to add: Text Entry

SANDBOX TESTING



Important Sandbox Testing Notes:

When testing on a Salesforce Sandbox, you often are not using a real email address that you have access to. (e.g. user@company.com.sandboxname) If so, we strongly recommend that you to change your Salesforce Sandbox email to a real email address before you begin testing so that your EchoSign account tied to a real email address. If not, it will be problematic if you want to change your email address later when you move to production because your EchoSign account will be tied to an email address that does not exist and cannot be verified to make email changes.

ECHOSIGN SUPPORT

For questions and additional assistance, please visit the [Adobe EchoSign Support portal](#).

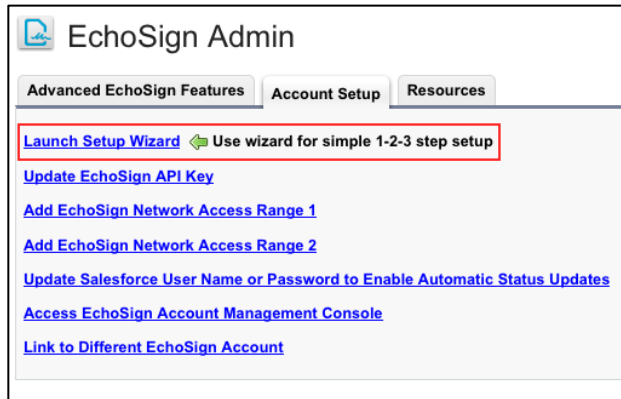
If you are running into issues configuring EchoSign for Salesforce or sending agreements, you can also contact your designated Client Success Manager for assistance.

BASIC SETUP STEPS AFTER UPGRADE OR INSTALLATION

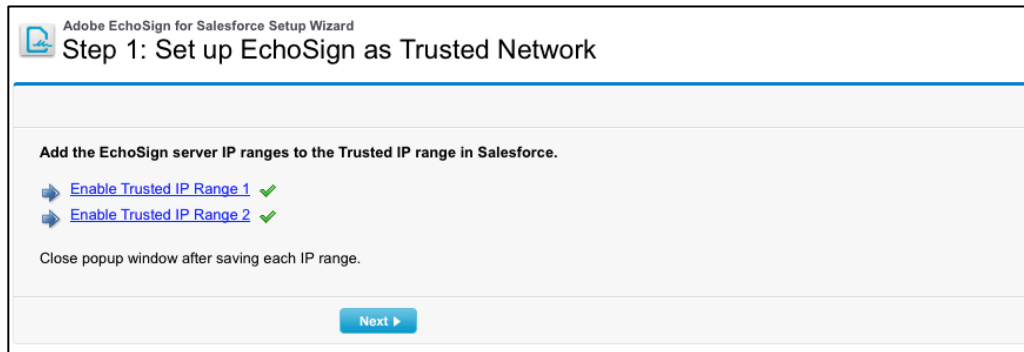
A few simple setup steps are required before you can start sending EchoSign agreements from Salesforce and this is accomplished by launching the setup wizard. After upgrading or installing EchoSign for Salesforce v13, please click on the EchoSign Admin tab.



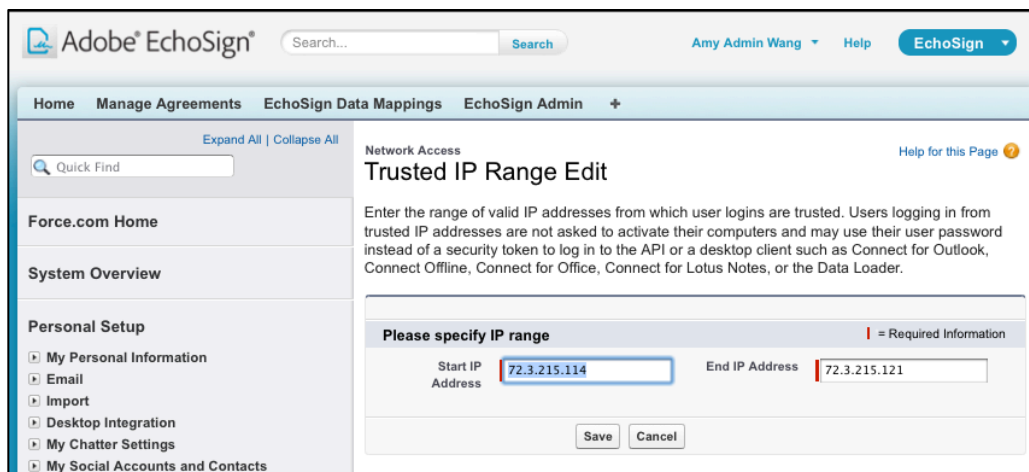
If the Setup Wizard doesn't launch automatically, please go to the Account Setup tab and click the link 'Launch Setup Wizard'.



Step 1: Set up the 2 EchoSign IP Ranges as trusted ranges within Salesforce.



Close the popup window after saving each IP range.





Step 2: Enable automatic status updates by entering and saving your Salesforce username and password. Click the 'Save' button and when successfully saved, click the 'Next' button to continue.

Step 3: Copy the EchoSign API key from your EchoSign account and save it into Salesforce.

Notes:

- 1) Make sure you do not check the option 'Lock sessions to the IP address from which they originated' under Setup / Administration Setup / Security Controls / Session Settings.
- 2) If you run into issues sending agreements, you can contact EchoSign Support to ensure that your EchoSign account is slotted in the right channel for the Salesforce integration, which is the default for Salesforce users.
- 3) EchoSign for Salesforce requires that you have cookies enabled on your browser. Please also check that third-party cookies are enabled as that is required in some browsers to fully access the application pages.
- 4) If you are using Salesforce Professional Edition, you will need to complete installation by following the additional steps in the section [EchoSign for Salesforce Professional Edition - Additional Installation Steps](#).

CONGRATULATIONS!

YOU HAVE SUCCESSFULLY INSTALLED AND SET UP ECHOSIGN FOR SALESFORCE. TRY SENDING AN AGREEMENT AND EXPERIENCE ECHOSIGN FOR THE FIRST TIME.

After the initial setup, the EchoSign Admin tab is a useful page you can come back to access links to EchoSign features, setup configurations, and other resources. Administrators should also consider installing the [EchoSign Walk-Thrus App](#) to get step-by-step guidance on some key features in the app.

EchoSign Admin

Advanced EchoSign Features
Account Setup
Resources

- [Custom Settings](#): Select the fields and options to enable or disable for the Agreement record.
- **Send to EchoSign Buttons**: Add a **Send to EchoSign** button on a Salesforce page layout to generate an agreement for signature.
 - [Add to Account](#)
 - [Add to Contact](#)
 - [Add to Lead](#)
 - [Add to Opportunity](#)
 - [Add to Contract](#)
- **Agreement Templates**: Create reusable templates to populate predefined values and selections for agreements. Link an agreement template to a 'Send to EchoSign' button from a Salesforce object (e.g. Opportunity).
- **Merge Mappings**: Merge data from Salesforce into your EchoSign agreements before sending for signature.
- **Data Mappings**: Push data from your signed EchoSign agreements back to Salesforce.com.
- **Group Mappings**: Synchronize users in Salesforce with your EchoSign groups.

For additional instructions, reference the EchoSign for Salesforce [configuration guide](#)

NEXT STEPS AFTER BASIC SETUP

EchoSign for Salesforce is now installed in your Salesforce organization. The following are some optional next steps for further customizing and using EchoSign for Salesforce.

1. BASIC CUSTOMIZATION

- ❖ Start [sending agreements](#).
- ❖ [Add the EchoSign Agreement List to Contacts, Opportunities, Accounts, Leads and Contracts](#).

2. ADVANCED CUSTOMIZATION AND SETTINGS

- ❖ [Advanced Customization Options](#) – Add the EchoSign Agreement List to other Salesforce objects, customize agreement fields, and more.
- ❖ [EchoSign for Salesforce Custom Settings \(Improved!\)](#) – Change EchoSign for Salesforce behavior and available options.

3. ENABLE ADVANCED FEATURES

- ❖ Configure Salesforce Sites if your users may be [sending large transactions](#) over 2.8MB
- ❖ [EchoSign Data Mappings](#) – Map form field data entered by signers and push EchoSign files back into Salesforce objects.
- ❖ [EchoSign Merge Mappings](#) – Merge data from Salesforce objects into form fields in EchoSign agreements before they are sent for signature.
- ❖ [Agreement Templates and Send to EchoSign Button](#) – Set up default values and settings for your agreements ahead of time. Also optionally link an agreement template to a 'Send to EchoSign' button on a Salesforce object. (e.g. Opportunity)
- ❖ [EchoSign Group Mappings](#) - Synchronize users in Salesforce profiles with your EchoSign groups.
- ❖ [Updating Salesforce with Agreements Sent Outside of Salesforce](#) – Even if you send agreements or create EchoSign Widgets directly through the EchoSign API or send agreements from EchoSign.com, you can have those agreements pushed into Salesforce.
- ❖ [Automation and Background Actions](#) – In conjunction with Salesforce workflow or triggers, set up automatic agreement workflows through background actions, onLoad actions, or sending on behalf of another user.
- ❖ [Require Sign On to Salesforce.com to Access Echosign Account](#) – To control access, require that your Salesforce.com users be signed on to Salesforce to access their EchoSign accounts.
- ❖ [Advanced Signer Authentication Methods](#) – Add additional level of verification of signers' identity through Knowledge Based Authentication or Web Identity verification.

4. OTHER ECHOSIGN PRODUCTS

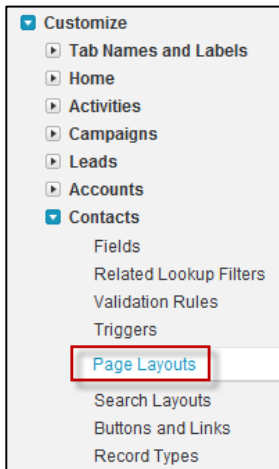
- ❖ [EchoSign Real-Time Quotes Integration](#) – Send a Salesforce Quote for Signature.
- ❖ [EchoSign Chatter Integration](#) – Install the EchoSign for Chatter Agreement status updates to your Chatter feed.
- ❖ [EchoSign Walk-Thrus](#) – Install the EchoSign Walk-Thrus App and get step by step instructions on how to configure some key features in EchoSign for Salesforce

BASIC CUSTOMIZATION

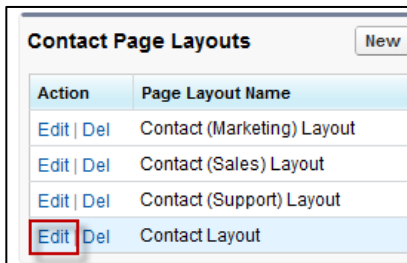
ADD THE ECHOSIGN AGREEMENTS LIST ON THE CONTACT, OPPORTUNITY, ACCOUNT, LEADS AND CONTRACTS PAGE LAYOUTS

The instructions below describe how to associate Agreements with a Contact object, but they can be applied to any other object referenced from the Agreement object – Opportunities, Accounts, Leads and Contracts.

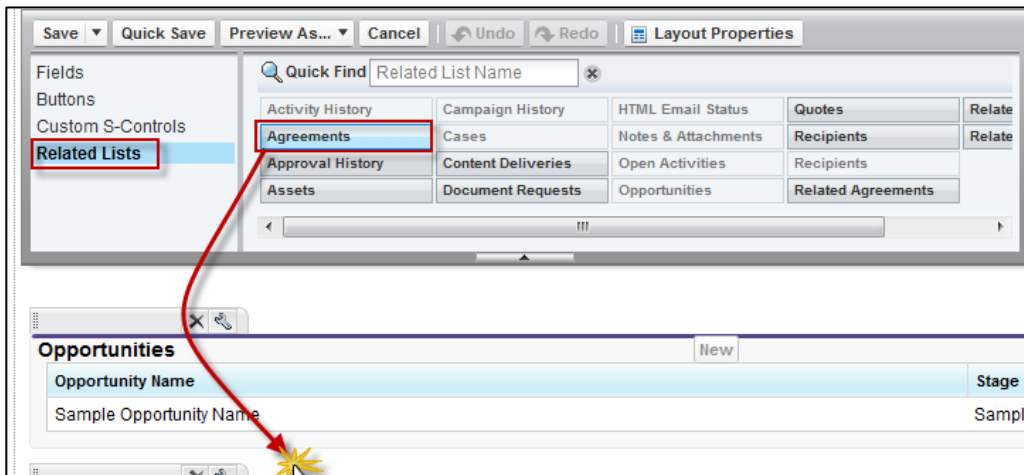
- Go to Setup / Customize / Contacts / Page Layouts



- Click 'Edit' next to Contacts Layout



- Click on 'Related Lists' then drag and drop the 'Agreements' list to the desired place on the page layout



- Click 'Save'

SENDING AN AGREEMENT USING ECHOSIGN FOR SALESFORCE

Create a new agreement by clicking 'New' on the Agreements tab or on the Agreements related list in one of the related objects (Contact, Opportunity, Lead, etc.)

1. Specify the recipients
2. Name the agreement, type a message, select signature type and language
3. Select the relevant sending options and security options
4. Attach files from your computer or from the Salesforce Library or from Salesforce Content.
5. Click the 'Send for Signature' button

EchoSign Actions

5 Send for Signature
Save Agreement

Recipients = Required Information

Action	Role	Type	Recipient	Email / Fax
	Signer	Contact	<input type="text"/>	

Add Recipient

I also need to sign this document

Host signing for the first signer

Send email copies to:

Agreement Detail

Agreement Name

Message

Language English (United States) **Opportunity**

Signature Type e-Signature **Account**

Agreement Options

Allow signers days to sign this document.

Remind recipient to sign

Preview document or position signature fields

Security Options

Verify signer identity using a password

Password protect the signed document

Attachments

Action	Title	Last Modified Date	Created By
Upload File	OR Select from: Salesforce Documents Salesforce Content		

USING ECHOSIGN FORMS

EchoSign gives you the ability to use interactive forms to collect data from your signers, position signature and initial fields in your documents, collect two-party information from both sender and signer and more.

You can create your own EchoSign template library by storing EchoSign forms and templates in your Salesforce Documents tab.

EchoSign Smart Forms and Text Tags provide the following benefits:

- Set specific locations for customers to sign and initial documents
- Collect data from signers that can later be pushed back into your Salesforce account.
- Merge data from Salesforce into document fields before sending for signature.

For detailed information on creating EchoSign Smart Forms using Adobe Acrobat, please refer to the [Smart Forms Tutorial](#).

You may also create EchoSign forms by adding special text tags in any document you send through EchoSign (Word, PDF, Text, etc.). For more details read our [Text Forms Tutorial](#).

CONFIGURE SALESFORCE TO SEND LARGE DOCUMENTS FOR SIGNATURE

If you choose not to expose this feature, skip this section.



Note: Sending file transactions over 2.8MB for signature is **not** supported in Salesforce Professional Edition. If you are using Salesforce Professional Edition, skip this section. Then complete the installation by following the steps in the section [EchoSign for Salesforce Professional Edition - Additional Installation Steps](#).

To enable sending of large files over 2.8MB follow the instructions below. 2.8MB is the sum total of all files in a single transaction.

CONFIGURE ECHOSIGN CALLBACK SITE AND CUSTOM SETTINGS TO SEND LARGE FILES

1. You first need to set up a Site for EchoSign Callback so that agreement updates can be pushed to Salesforce in a timely manner.
2. Go to Setup / App Setup / Develop / Sites
3. Follow the Salesforce instructions if creating a Site for the first time. If you have not used Salesforce sites in your Salesforce org, you will be required to register a Force.com domain name that will be used for all you Salesforce sites in the account.
 - a. **Note:** Keep in mind that if you are registering a new domain name, it is recommended that you don't have a very long domain name or the secure web URL may exceed the 255 character limit that EchoSign has for callback URLs.
4. Click the **New** button
5. Set the 'Site Label' value to: EchoSign Callback
6. Set the 'Site Name' value to: EchoSign_Callback
7. Set the 'Site Contact' value to a Salesforce user who will receive notifications about Sites. In most cases, this would be the account admin.
8. Set the 'Default Web Address' value to EchoSignCallback.

9. Set the 'Active' value to Checked.
10. Set the 'Active Site Home Page' value to EchoSignCallback
11. Click 'Save' to continue.
12. Copy the value of the 'Secure Web Address' field. You will need it for the configuration below. However, if testing on Sandboxes, copy the http URL and not the https URL.

Site Details
EchoSign Callback

« Back to List: Sites

Site Detail Edit Public Access Settings Login Settings

Site Label	EchoSign Callback
Site Description	
Default Web Address	http://amywang-developer-edition.na12.force.com/EchoSignCallback [Preview as Admin]
Secure Web Address	https://amywang-developer-edition.na12.force.com/EchoSignCallback [Preview as Admin]

13. Now go to Setup / App Setup / Develop / Custom Settings
14. Click on the 'EchoSign Settings' link
15. Click on the 'Manage' Button
16. Click the New (above the 'Default Organization Level Value' label) to create default custom settings for all Users.

Edit EchoSign Settings Save Cancel

EchoSign Settings Information

Location Acme Corporation

--DEPRECATED - Do Not Use--

EchoSign API Server URL Override

Action Window Type

Add Audit PDF to Attachment List

--DEPRECATED - Do Not Use--

Add Signed PDF as Separate Attachments

--DEPRECATED - Do Not Use--

Add Supporting Files to Attachment List

Allow Sending On Behalf of Others

Auto-Sync Group Mappings

Callback URL EchoSign to Salesforce Site

17. Set the 'Callback URL EchoSign to Salesforce Site' value to the value of the 'Secure Web Address' you copied from the site configuration above. Make sure the address prefix is 'https' and not 'http'. Click 'Save' to save the settings.
18. You also need to add the AgreementAttachmentService Apex class to the Site profile so it is visible. Go to Develop / Sites / EchoSign Callback / Public Access Settings / Enable Apex Class Access. Find the Available Apex Class called 'echosign_dev1.AgreementAttachmentService' and add it to the Enabled Apex Classes as shown below.

19. Also you need to add the IP ranges for public access settings in the Site so that it is restricted properly to EchoSign IPs. If not, go to Develop / Sites / EchoSign Callback / Public Access Settings / Login IP Ranges. Click the 'New' button and add both of these IP ranges:
- a. 72.3.215.114 - 72.3.215.121
 - b. 166.78.79.112 - 166.78.79.127

When completed, the Login IP Ranges for the EchoSign Callback Site should be as follows:

Action	IP Start Address	IP End Address
Edit Del	72.3.215.114	72.3.215.121
Edit Del	166.78.79.112	166.78.79.127

ECHOSIGN DATA MAPPINGS – PUSH SIGNER DATA AND FILES TO SALESFORCE RECORDS

EchoSign form field data mapping lets you define how EchoSign will update Salesforce.com objects with data it captures from signers. For example, you can update a signer's contact record in Salesforce.com with the address and phone number they provided when completing and signing your document. Additionally, you can also push back the EchoSign signed agreement, audit trail, and any uploaded supporting documents from recipients into Salesforce objects by setting up file mappings.

[If you choose not to use this feature, skip this section.](#)

ABOUT ECHOSIGN FORM FIELD DATA MAPPINGS

EchoSign Data Mappings update Salesforce objects when an EchoSign agreement is signed. Each Data Mapping is set up ahead of time and includes data mapping rules. Each data mapping rule defines the data source and the target Salesforce field it needs to update.

A data source for a mapping can be an EchoSign form field, a specific constant value or a value from an EchoSign Agreement Field. The target for each data mapping item may be any field in any Salesforce object that can be referenced from the EchoSign Agreement.

For example, the mapping below updates the signer's first and last name (as entered by the signer) in the Contact object. It also updates the opportunity close date with the Agreement's signed date and the signed agreement and audit trail.

Source Type	Source Value	Target Salesforce Field
EchoSign Form Field	firstname	First Name (String)
EchoSign Form Field	lastname	Last Name (String)

CREATING AN ECHOSIGN FORM FIELD DATA MAPPING (IMPROVED!)

To create a new EchoSign Data Mapping, follow the steps below:

1. Select 'EchoSign' on the menu at the top right of the screen
2. Click the 'EchoSign Data Mappings' tab
3. Click 'New'



4. Type a name for the mapping and decide whether you would like it to be the default mapping. If you check 'Default Data Mapping?', the mapping will execute by default after your agreements are signed.

Mapping Information	
Set up EchoSign Data Mappings to specify how to update Salesforce.com object fields with data entered by signers into EchoSign document form fields. The data is pushed back into Salesforce automatically after the EchoSign agreement is signed. Please refer to the installation and customization guide for additional instructions.	
EchoSign Data Mapping Name	Data Mapping 1 <input type="checkbox"/> Default Data Mapping? <input checked="" type="checkbox"/>

5. There are a couple ways to specify the EchoSign agreement fields for the 'Source Value' either type in the field name or import a list of selectable fields from an existing document.

If you want to import a list of EchoSign form field names to map data from by selecting an existing agreement that was sent for signature and signed. You may import fields from multiple agreements to add additional fields. Fields with duplicate names will not be imported twice.

Note: If you do not have any custom EchoSign fields in the document to import from, you will not be able to import the standard default EchoSign fields that come with each signed agreement. (e.g. signed (date), email, first, last, title, and company)

- Select the agreement you would like to import fields from.

Mapping Information	
Set up EchoSign Data Mappings to specify how to update Salesforce.com object fields with data entered by signers into EchoSign document form fields. The data is pushed back into Salesforce automatically after the EchoSign agreement is signed. Please refer to the installation and customization guide for additional instructions.	
EchoSign Data Mapping Name	Data Mapping <input type="checkbox"/> Default Data Mapping? <input checked="" type="checkbox"/>
Import EchoSign Document Form Fields (optional) To map data from EchoSign document fields into Salesforce, you need to first import the available form fields from existing EchoSign agreements that have been signed.	
12 form fields were imported to this mapping.	Import fields from <input type="text" value="nda"/> <input type="button" value="Import Form Fields"/>

Lookup

Search

You can use "*" as a wildcard next to other characters to improve your search results.

[< Clear Search Results](#)

Search Results

Agreement Name	Recipient (Contact)
nda	

- Click 'Import Form Fields' button
- The number of fields imported will be displayed

▼ Import EchoSign Document Form Fields (optional)

To map data from EchoSign document fields into Salesforce, you need to first import the available form fields from existing EchoSign agreements that have been sent and signed. You can import fields from multiple agreements.

12 form fields were imported to this mapping. Import fields from

6. You can add mapping rules to update fields in the EchoSign Agreement object. You can create a mapping to any field (including custom fields).
7. Click 'Add Mapping'

Map Data to the EchoSign Agreement Object

Source Type	Source Value	Target Salesforce Field - Agreement Object	Do Not Overwrite Existing	Do Not Write Empty	Disable
<input type="button" value="Add Mapping"/>					

8. Define mapping rules through the following selections:
 - **Source Type** – 'EchoSign Form Field', 'Constant', 'Agreement Field'
 - **Source Value** – Depending on the Source type, you will see the following:
 - 'EchoSign Form Field' – Select an EchoSign Form Field or input in a specific field name. Click on the and icons to switch between a text input field and a selectable dropdown displaying the available and imported form field values.

Map Data to the EchoSign Agreement Object

Source Type	Source Value
EchoSign Form Field	field1
EchoSign Form Field	field2
EchoSign Form Field	field3

- 'Constant' – Type a specific value
 - 'Agreement Field' – Select an EchoSign Agreement Field
- **Target Salesforce Field** – Select a target Salesforce field where the Source Value will be copied to after the agreement is signed
 - **Do Not Overwrite Existing** – If checked, then if a value already exists in the target Salesforce field, do not overwrite the value using this mapping rule.
 - **Do Not Write Empty** - If checked, then if the source value from the EchoSign agreement is empty, do not write the empty value into the target Salesforce field using this mapping rule.
 - **Disable** – If checked, this row in the mapping will not execute.
9. You can add mapping rules to any Salesforce object that is associated to the EchoSign Agreement object (through one or more lookup relationships).
 10. To do this, click 'Select a related object'

Map Data to Additional Related Objects ! = Required Information

To map EchoSign document field data into a related Salesforce object, first select the related object and then specify the source and target values.

Select a related object

11. Select any object referenced from the Agreement object

Map Data to Additional Related Objects

To map EchoSign document field data into a related Sales

Select the Salesforce object you want to map data to:

Agreement: --None-- :

--None--

Account

Additional Recipient 1 (Contact)

Additional Recipient 1 (Lead)

Additional Recipient 1 (User)

Additional Recipient 2 (Contact)

Additional Recipient 2 (Lead)

Additional Recipient 2 (User)

Additional Recipient 3 (Contact)

Additional Recipient 3 (Lead)

12. If this is the object you need, click the 'Add Object' button. If the object you need is referenced from the current object, select it from the list of objects that appears in the next dropdown menu.

Map Data to Additional Related Objects

To map EchoSign document field data into a related Salesforce object, first select the

Select the Salesforce object you want to map data to:

Agreement: Opportunity : --None-- :

--None--

Account ID

Campaign ID

13. After you have selected the correct object, click the 'Add Object' button. A new group of mapping items will appear, allowing you to create data mapping rules for the object you selected.

Map Data to the Agreement.Opportunity (Opportunity) Object

Map EchoSign Form Field Data to Target Salesforce Field

Source Type	Source Value	Target Salesforce Field	Do Not Overwrite Existing	Do Not Write Empty	Disable
Add Field Mapping					

Map EchoSign Signed Agreement, Audit Trail, or Supporting Documents to Target Salesforce Object

Source Type	Target Type	Target Salesforce Field	Disable
Add File Mapping			

Map Data to the Agreement.Account (Account) Object

Map EchoSign Form Field Data to Target Salesforce Field

Source Type	Source Value	Target Salesforce Field
EchoSign Form Field	billingstreet	Billing Street (Text Area)
EchoSign Form Field	billingcity	Billing City (String)
EchoSign Form Field	billingstate	Billing State/Province (String)

CREATING AN ECHOSIGN FILE MAPPING

- To map the EchoSign signed agreement or audit trail to the selected target Salesforce object, click 'Add File Mapping.'
- Select from one of the following Source Types:
 - Signed Agreement – Merged PDF:**
 - If you send multiple documents for signature in a single transaction, this option will push the signed documents back to the Salesforce object record as a single merged PDF.
 - Signed Agreement – Separate PDFs:**
 - If you send multiple documents for signature in a single transaction, this option will push the signed documents back to the Salesforce object record as separate PDFs.
 - Audit Trail**
 - This pushes back the audit trail in PDF format back to the Salesforce object record.
 - Supporting Documents**
 - This pushes back any supporting documents that are uploaded by the signers back to the Salesforce object record.

- If you select the Target Type 'Add a reference link to the file', that will provide the URL to get the signed agreement PDF. You will need to select the target field where the URL will be copied.

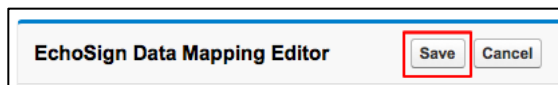
Note: Adding a reference link for the audit trail or supporting documents is not supported. You can attach the audit trail PDF or supporting documents to the Salesforce object record. Also, the reference link can only be mapped into a text based field (e.g. string, picklist)

- If you select 'Attach file directly to object', that will attach the PDF document directly to the object you are mapping to if an attachment list is available for that object. **Note:** Not all objects (e.g. Users) support file attachments so do not map files to those objects.

Map EchoSign Signed Agreement, Audit Trail, or Supporting Documents to Target Salesforce Object

Source Type	Target Type	Target Salesforce Field
Audit Trail	Attach file directly to object	
Supporting Documents	Attach file directly to object	
Signed Agreement – Merged PDF	Add a reference link to the file	Account Description (Text Area)
Signed Agreement – Separate PDFs	Attach file directly to object	

- Click 'Save' to save the mapping



USING DEFAULT AND MULTIPLE DATA MAPPINGS

You may create as many data mappings as necessary, one of which may be defined as the default mapping that will be executed whenever an agreement's status changes to 'Signed'. Only one mapping can be a default mapping.

You may also explicitly specify which mapping you'd like to use for an agreement by referencing it in the Agreement's 'Data Mapping' (echosign_dev1__Process_Template__c) field. You can use a Salesforce workflow or trigger to run custom business logic to determine which template to use. Please note that you do not need to set that field to point to the default mapping – the default mapping would be executed if this field were left empty.

You may also execute a mapping before or after the Agreement status changes to 'Signed' (e.g. execute the mapping after the first signer signed it) by setting the 'Trigger Data Mapping' (echosign_dev1__Trigger_Process_Template__c) checkbox. You may use a Salesforce workflow or trigger to run any custom business logic to determine when to execute a Data Mapping.

In addition, you can associate a data mapping to an agreement template, which can also let you set up other default fields and options for your agreements. See [Agreement Templates](#) section for more information.

TROUBLESHOOTING

Salesforce fields have validation rules that may cause a mapping to fail. For example, if you map an EchoSign text field to a Salesforce email field validation may fail if the content of the field is not a valid email address.

Please make sure to use EchoSign Form Field validation rules where possible to ensure data entered by signers can be pushed into Salesforce. EchoSign standard PDF form fields validation rules from PDF documents and allows you to create validation rules when using EchoSign Text Tags - See [this tutorial](#) for more information.

If a mapping fails for some reason, it logs the error message in the 'Data Mapping Error' (echosign_dev1__Data_Mapping_Error__c) field on the EchoSign Agreement object. You may expose this field on the agreement page layout or create a simple report in Salesforce to find agreements where mapping errors had occurred. In addition data mapping errors will be sent to the owner of the data mapping by email. Go to Setup / Develop / Custom Settings (EchoSign) to enable or disable the email notification using the setting called 'Enable Mapping Error Notification'. To enable the 'Data Mapping Error' field, follow the steps [here](#) and drag the field to the page layout.

ECHOSIGN MERGE MAPPINGS – GENERATE DOCUMENTS WITH SALESFORCE DATA

EchoSign Merge Mappings give you the ability to merge field data from Salesforce into your documents fields before sending them out for signature.

For example, you can populate a Lead’s address and phone number from a Salesforce record automatically into the agreement before it is sent to the Lead for signature.

If you choose not to use this feature, skip this section.

ABOUT ECHOSIGN MERGE MAPPINGS

A data source type for a merge mapping can be a specific constant value or a value from a Salesforce object field that can be referenced from the EchoSign Agreement. The target for each merge mapping item is a designated field from an EchoSign agreement.

For example, the mapping below updates the EchoSign document fields for first name and last name with the Salesforce Recipient (Lead) field data. It also fills in the company field in the document with the value ‘Acme Corporation’.

Map Salesforce Object Fields to EchoSign Document Fields		
Target EchoSign Document Field	Source Type	Source Value
firstname	Salesforce Object Field	Edit : Recipient (Contact) : First Name
lastname	Salesforce Object Field	Edit : Recipient (Contact) : Last Name
phone	Salesforce Object Field	Edit : Recipient (Contact) : Business Phone
notes	Salesforce Object Field	Edit : Recipient (Contact) : Account ID
company	Constant	Acme Corporation

CREATING AN ECHOSIGN MERGE MAPPING (IMPROVED!)

To create a new EchoSign Merge Mapping, follow the steps below:

1. Select ‘EchoSign’ on the menu at the top right of the screen
2. Click the ‘EchoSign Merge Mappings’ tab
3. Click ‘New’



4. Type a name for the mapping and decide whether you’d like it to be the default mapping. If you check ‘Default Merge Mapping?’, the mapping will execute by default when sending an agreement for signature.

Mapping Information	
<small>Set up EchoSign Merge Mappings to specify how to merge data from Salesforce object fields into EchoSign document form fields automatically before the agreement is sent for signature. To preview the merged fields before the agreement is sent, select the EchoSign agreement setting called "Preview document or position signature fields". You can also edit the merge mapping settings to change how the attachments are handled. Please refer to the installation and customization guide for additional instructions.</small>	
EchoSign Merge Mapping Name	<input type="text" value="Merge Mapping"/> <input type="checkbox"/> Default Merge Mapping?

- To get a list of EchoSign form field names you can map data from, select an existing agreement that was sent for signature and signed. You may import fields from additional agreements to add additional fields. Fields with duplicate names will not be imported twice.
- Select the agreement you would like to import fields from.

Mapping Information

Set up EchoSign Data Mappings to specify how to update Salesforce.com object fields with data entered by signers into EchoSign document form fields when an agreement is signed. Please refer to the [installation and customization guide](#) for additional instructions.

EchoSign Data Mapping Name: Default Data Mapping?

Import EchoSign Document Form Fields (optional)

To map data from EchoSign document fields into Salesforce, you need to first import the available form fields from existing EchoSign agreements that have been sent and signed. You can import fields from multiple agreements.

12 form fields were imported to this mapping. Import fields from

Lookup

Search:

You can use "*" as a wildcard next to other characters to improve your search results.

< Clear Search Results

Search Results

Agreement Name	Recipient (Contact)
nda	

- Click the 'Import Form Fields' button
- The number of fields imported will be displayed

Import EchoSign Document Form Fields (optional)

To merge data from Salesforce into EchoSign document fields, you need to first import the available form fields from existing EchoSign agreements that have been sent and signed. You can import fields from multiple agreements.

12 form fields were imported to this mapping. Import fields from

- You can add mapping rules to merge data into EchoSign documents. You can create a mapping from fields that can be referenced from the EchoSign Agreement object (including custom fields).
- Click 'Add Field Mapping'

Map Salesforce Object Fields to EchoSign Document Fields

Target EchoSign Document Field	Source Type	Source Value	Disable	Action
<input type="text"/>				

[Add Field Mapping](#)

- Define mapping rules through the following selections:
 - Target EchoSign Document Field** – Select an EchoSign Form Field or input in a specific field name. Click on the and icons to switch between a text input field and a selectable dropdown displaying the available and imported form field values.


Map Salesforce Object Fields to EchoSign Document Fields

Target EchoSign Document Field	Source Type
<input type="text" value="firstname"/>	Salesforce Object Field
<input type="text" value="lastname"/>	Salesforce Object Field

- Source Type** – 'Salesforce Object Field' or 'Constant'
- Source Value** – Depending on the Source type, you will see the following:
 - 'Salesforce Object Field' – When you then click on 'Select Field', this will open a window for you to select the Salesforce source object field.

- 'Constant' – Type a specific value
 - **Disable** – If checked, this mapping row will not execute.
12. Click 'Save' to save the mapping.



 **Note:** There are Merge Mapping settings that define how file attachments are handled. By default, the original attached document (e.g. a NDA template) will be removed and the merged document will be attached to the agreement record once the agreement is sent. If you want to change the default values, go to the [Merge Mapping Settings](#) section of this document for more information.

USING DEFAULT AND MULTIPLE MERGE MAPPINGS

You may create as many Merge Mappings as necessary, one of which may be defined as the default mapping that will be executed whenever an agreement is sent for signature. Only one mapping can be a default mapping.

You may also explicitly specify which merge mapping you'd like to use for an agreement by referencing it in the Agreement's 'Merge Mapping' (echosign_dev1__Merge_Mapping__c) field. You may use a Salesforce workflow or trigger to run any custom business logic to determine which template to use. Please note that you do not need to set that field to point to the default mapping – the default mapping would be executed if this field is left empty.

TROUBLESHOOTING

Salesforce fields have validation rules that may cause a mapping to fail. For example, if you map Salesforce email field to an EchoSign text field it may fail if the content of the field is not a valid email address.

If a mapping fails for some reason, it logs the error message in the 'Merge Mapping Error' (echosign_dev1__Merge_Mapping_Error__c) field on the EchoSign Agreement object. You may expose this field on the agreement page layout or create a simple report in Salesforce to find agreements where mapping errors had occurred. In additional data mapping errors will be sent to the owner of the data mapping by email. Go to Setup / Develop / Custom Settings (EchoSign) to enable or disable the email notification using the setting called 'Enable Mapping Error Notification'. To enable the 'Merge Mapping Error' field, follow the steps [here](#) and drag the field to the page layout.

In addition, you can associate a merge mapping to an agreement template, which can also let you set up other default fields and options for your agreements. See [Agreement Templates](#) section for more information.

ECHOSIGN AGREEMENT TEMPLATES AND 'SEND TO ECHOSIGN' BUTTON

EchoSign Agreement Templates offer an easy way to set up many default values and settings for your agreements ahead of time. You can link an agreement template also to a 'Send to EchoSign' button.

If you choose not to use this feature, skip this section.

ABOUT AGREEMENT TEMPLATES

This includes pre-defining agreement fields including name, message, language, signature type, expiration dates, and security options. Also, you can associate a particular data mapping, merge mapping, and object (Account, Opportunity, or Contract) to the agreement template. Additionally, you can pre-set the recipient definitions, map fields to agreement fields, and pre-define the file attachments.

In addition, you can also set up a 'Send to EchoSign' button that appears on a related object record (e.g. Opportunity) so that it links to an agreement template by default. Clicking on the button would generate an agreement using an agreement template.

CREATING AN AGREEMENT TEMPLATE (IMPROVED!)

To create a new EchoSign Agreement Template, follow the steps below:

- Select 'EchoSign' on the menu at the top right of the screen
- Click the 'Agreement Templates' tab
- Click 'New'



- Enter a name for the agreement template and then you can also define the fields and options you want to set up for your template.

DEFINE TEMPLATE INFORMATION

The form contains the following fields and options:

- Agreement Template Name: [Text Input Field]
- Master Object Type: [Text Input Field]
- Default:
- Auto Send:

- **Master Object Type** - The Master Object Type is the name of the Salesforce object that you want to use as a master reference for some of the optional definitions in the agreement template. For example, you can define Recipients, Field Mappings, or Attachments for the agreement that look up to fields and data in the Master Object or data from lookup objects. Examples of a Master Object include 'Opportunity', 'Lead', and 'Account'. If you have a Master Object defined in the Agreement Template, you should initiate the agreement from a 'Send to EchoSign' button on the Master Object. See [this section](#) for more information about how to enable a default button or create new 'Send to EchoSign' buttons.

- **Default** - Decide if you want to set this as the Default agreement template for your new agreements. You can also define a specific agreement template to associate with other agreements, which can override the default agreement template. For example, you can create a custom 'Send to EchoSign' button for the Account object that is associated with a specific agreement template. See [this section](#) for more information about how to create custom buttons.
- **Auto Send** - If you have automated workflows that you want to use to trigger the sending of agreements or if you would like to automatically send an agreement after a user hits a 'Send to EchoSign' button from a Salesforce record, then you can check the 'Auto Send' box. For 'Auto Send' to work, you need to have at least one recipient and one attachment defined in the agreement template.

DEFINE AGREEMENT INFORMATION

- Enter an Agreement Name. Optionally, add a message and select a signature type and recipient language.
- **Note:** Keep in mind that for text fields in the agreement template (e.g. Agreement Name, Message, etc.), you can optionally use Salesforce variables as part of the definition to dynamically generate this data for the agreement. For example, this is beneficial if you want to customize the agreement name and message to recipients each time the agreement is generated.

Example 1:

- **Master Object:** Opportunity
- **Agreement Name:** Acme Corp Agreement - {!Name}
- **Message:**

Here is the estimate for:
 Account: {!Account.Name}
 Amount: {!Amount}
 Please sign the attached agreement.

Thanks, {!Owner.Name}

The following is the result when the Agreement gets generated from a specific Opportunity:

Agreement Detail	
Agreement Name	Acme Corp Quote Agreement - Customer Opp - Acme EchoCorp
Message	Here is the quote for: Account: Company XYZ Amount: 1620000.00 Please sign the attached agreement. Thanks, Amy Wang
Language	English (United States) ▾
Signature Type	e-Signature ▾

Example 2: Custom Object as Master Object

Custom Lookup Field on the Opportunity: Student__c

Agreement Template Definition: AgreementTemplateProcess AgreementTemplateProcess

- **Master Object:** Student__c
- **Agreement Name:** Student Agreement - {!Name}
- **Message:**

Hello {!Student__r.Student_Name__c}

Please sign the attached application.

Thanks, {!Account.Owner.Name}

DEFINE AGREEMENT OPTIONS

Agreement Options		
Email Copy To	<input type="text"/>	Enable Hosted Signing <input type="checkbox"/>
Days Until Expiration	<input type="text"/>	Enable Preview and Position Fields <input type="checkbox"/>
Sender Signature Order	--None-- ▾	Use Fax Number <input type="checkbox"/>
Send On Behalf Of	<input type="text"/>	Automatic Reminders Never ▾

- Select from a set of agreement options that are available including:
 - Email Copy To
 - Days Until Expiration
 - Sender Signature Order
 - Send On Behalf Of
 - Enable Hosted Signing
 - Enable Preview and Position Fields
 - Use Fax Number
 - Automatic Reminders

Note: For any text fields, you can optionally use Salesforce variables such as {!Id} or {!Account.Name} that reference the Master Object defined in the Agreement template. For example, you can type in {!Owner.Email} for the 'Email Copy to' or {!OwnerId} for the 'Send On Behalf Of' field. If the Master Object was 'Opportunity', then

the variable `{!OwnerId}` would represent the owner of the Opportunity and the variable `{!Owner.Email}` would represent the email of the owner of the Opportunity. If you are using the 'Send on Behalf of' functionality, make sure to enable it first by following these [instructions](#).

Note: The option 'Allow Signers to Suggest Revisions' is no longer available in EchoSign so you can remove the deprecated field from the layout.

DEFINE SECURITY OPTIONS

- Optionally, choose the Signer Verification Method for signers in your EchoSign account and signers outside of your EchoSign account:
 - Password to sign agreement
 - Knowledge based authentication
 - Web identity authentication
- Optionally, assign a password to open the PDF of the signed agreement.

DEFINE MAPPING SETTINGS

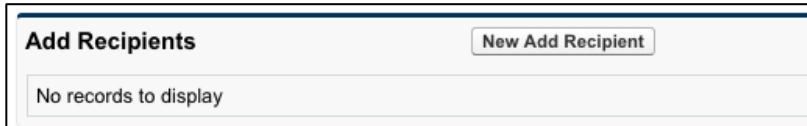
- If you have a merge mapping or data mapping that you want to automatically run with agreements using this agreement template, then specify the mappings in this section.

DEFINE REFERENCED OBJECTS

- Automatically associate an Account, Opportunity, or Contract to this agreement template by typing in the specific ID or entering a Salesforce variable such as `{!Id}`. This will allow your Agreements list in the referenced object to contain agreements sent with this agreement template.

ADD RECIPIENTS

- Make sure to save your agreement template to view this section called 'Add Recipients'. You can add up to 6 recipients as signers.
- Click on 'New Add Recipient'



- Select one of the following ways to specify your recipient:
 - Predefine the Recipient
 - Look Up Based on Master Object Field
 - Opportunity Primary Contact Role
 - Opportunity Contact Role
- Select the Recipient Type:
 - Contact
 - Lead
 - User
 - Email
- Select the Recipient Role:
 - Signer
 - Approver
- If you selected 'Predefine the Recipient', then simply select the recipient in the next screen.
- If you selected 'Look Up Based on Master Object Field', then the recipient will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. For example, the master object may be 'Opportunity'. In the next screen, select the source field from the Master Object (e.g. Opportunity) that will be used to look up the recipient. For example, you can populate the Recipient field with the User who created the Opportunity or who last updated the Opportunity.
- (NEW!) If you selected 'Opportunity Primary Contact Role', then the recipient will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. In this case, 'Opportunity' should be entered as the master object. If used, the primary contact in the Opportunity will be used as a recipient in the agreement.
- (NEW!) If you selected 'Opportunity Contact Role', then the recipient will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. In this case, 'Opportunity' should be entered as the master object. In the next screen, select the Opportunity Contact Role that will be used to select the contact as the recipient in the agreement. For example, you can populate the Recipient field with the Contact who has the Decision Maker role for the Opportunity.
- You can also set up placeholder recipients that have a Recipient Type but are not specifically defined until the sender defines the specific recipient when the agreement is generated. You do that by leaving Step 2 blank.

Action		Index	Source of Recipient	Recipient Type	Select Source Field from Master Object	Recipient - Contact
Edit Del		1	Predefine the Recipient	Lead		
Edit Del		2	Predefine the Recipient	Contact		Tyler Jackson
Edit Del		3	Predefine the Recipient	User		

ADD FILE ATTACHMENTS

- Make sure to Save your agreement template to view this section called 'Add File Attachments'.
- Click on 'New Add File Attachment'

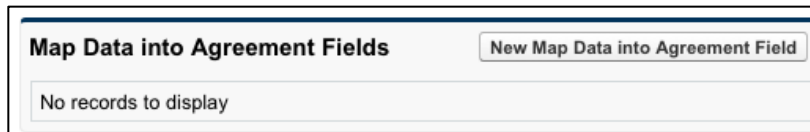
Add File Attachments		New Add File Attachment
No records to display		

- Select one of the following ways to specify your file attachment:
 - Document from Library
 - Document from Content
 - Document from Master Object
 - Quote Document from Master Quote
- If you selected 'Document from Library', then simply select from the Salesforce documents in the next step.
- If you selected 'Document from Content', then simply select from the Salesforce Content documents in the next step.
- If you selected 'Document from Master Object', then the document will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. For example, the master object may be 'Opportunity'. In the next screen, select the criteria by which your file attachment will be determined:
 - File Selection from Master Object (e.g. Opportunity)
 - Latest Document
 - Oldest Document
 - All Documents
 - Selection Determined By:
 - Last Modified Date
 - Created Date
- (NEW!) If you selected 'Quote Document from Master Quote', then the document will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. In this case 'Quote' is the master object that you need to enter for this agreement template. When you do this the quote PDF(s) generated from the Opportunity will be used as the file attachment(s). In the next screen, select the criteria by which your file attachment will be determined:
 - File Selection from Master Object (e.g. Opportunity)
 - Latest Document
 - Oldest Document
 - All Documents
 - Selection Determined By:

- Last Modified Date
- Created Date
- When you have a master object such 'Quote', you will need to set up a custom 'Send to EchoSign' button on the Quote object so that the agreement template documents you specified would be attached accordingly.

MAP DATA INTO AGREEMENT FIELDS

- Make sure to save your agreement template to view this section called 'Map Data into Agreement Fields'.
- Click on 'New Map Data into Agreement Field'



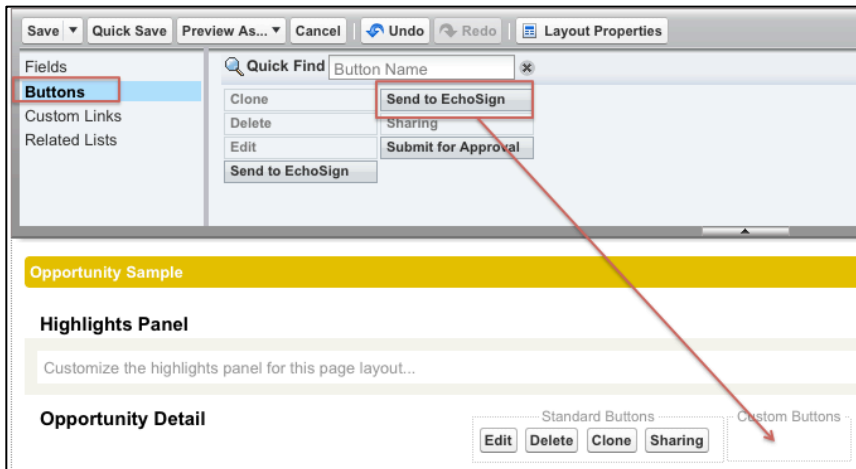
- Select one of the following mapping methods:
 - Input Specific Value
 - Select Master Object Field
- If you selected 'Input Specific Value', then input a target field value in the next screen. Also, select the target Agreement object field where your inputted value will be mapped.
- If you selected 'Select Master Object', then the field value will be looked up at the time the agreement is generated based on the master object you set up in this agreement template. For example, the master object may be 'Opportunity'. In the next screen, select the source field from your master object (e.g. Opportunity) and also select the target Agreement object field where the data will be mapped.

'SEND TO ECHOSIGN' BUTTON (IMPROVED!)

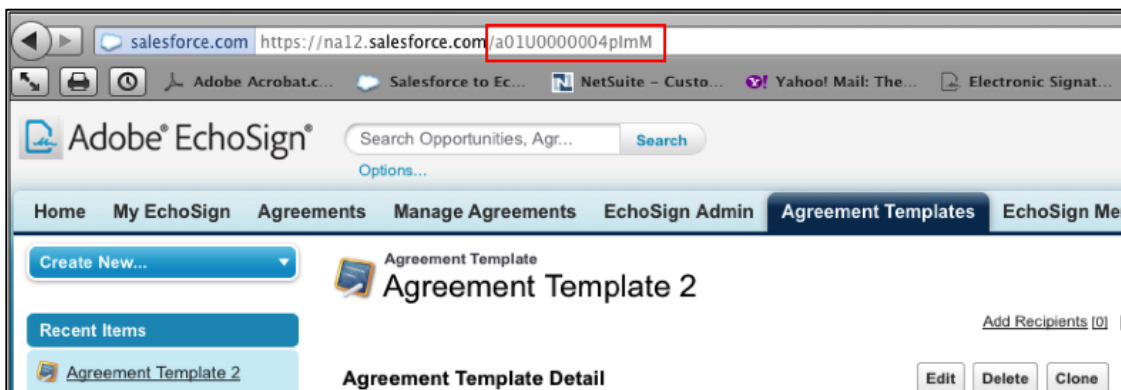
The 'Send to EchoSign' button is associated with the default agreement template or with any specific agreement template that you configure. By default the EchoSign for Salesforce integration includes a 'Send to EchoSign' button that you can add to your Opportunity, Account, Contact, Lead, Opportunity, or Contract page layouts. You can also create multiple custom 'Send to EchoSign' buttons that can be added to other objects and associated with different agreement templates.

Here is an example for the Opportunity object:

- To enable the 'Send to EchoSign' button for the Opportunity object, go to Setup / Customize / Opportunities / Page Layouts.
- Click on Edit 'Opportunity Layout'
- Drag the Button 'Send to EchoSign' from the top section to the 'Custom Buttons' box in the Opportunity Detail section.



- To create additional custom 'Send to EchoSign' buttons for other objects, go to the Setup / Customize / (Object) / Buttons and Links. You can label the button to meet your needs.
- Click 'New' under 'Custom Buttons and Links'
- You can copy what was set up for the default Opportunity button (see screenshot below) but will need to replace the Object ID variable at the end of the path with the Object ID variable that you want to add: `/apex/echosign_dev1__AgreementTemplateProcess?masterid={!Opportunity.Id}`
- **(Optional) Associate a specific Agreement Template to button:**
 - If you want to associate a specific Agreement Template for a specific 'Send to EchoSign' button, then the button path should be: `/apex/echosign_dev1__AgreementTemplateProcess?masterid={!Object.Id}&templateId=a01U00000004p1mM` where `templateId` should be set to the specific ID of the agreement template that is to be used. If this value is not set, then the default agreement template will be used. You can get the `templateId` from the URL of the agreement template page:



- **(Optional) After button is clicked, send the user to a different page than the agreement page using `retURL` parameter.**
 - **Example:** You can define a 'Send to EchoSign' button so that when clicked, it will bring the user to a specified URL or back to the record instead of going to the Agreement page. To define this button, use this string as an example:
 - `/apex/echosign_dev1__AgreementTemplateProcess?masterid={!Opportunity.Id}&retURL={!Opportunity.Id}`

- (Optional) After button is clicked, trigger an **onLoadAction** for 'Send'
 - **Example:** You can define a 'Send to EchoSign' button so that when clicked, it will bring the user to the agreement page and after the page loads, the agreement will be 'Sent' without additional user intervention. To define this button, use this string as an example:
 - /apex/echosign_dev1__AgreementTemplateProcess?masterId={!Opportunity.Id}&onloadAction=Send
 - To learn more about onLoadActions, go to this section.
 - Alternatively, you can map the 'Send' value to the 'On Load Action (Picklist)' field on the Agreement record. You can define this mapping in the Agreement Templates section called '[Map Date to Agreement Fields](#)'.
- Click 'Save'.
- Then go to the Page Layout for that object and add the 'Send to EchoSign' button to the page similar to the steps mentioned above for the Opportunity example.

Edit Opportunity Custom Button or Link

Send to EchoSign (Managed)

This Custom Button or Link is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Custom Button or Link Edit Save Quick Save Preview Cancel

Label	Send to EchoSign
Name	Send_to_EchoSign i
Namespace Prefix	echosign_dev1
Installed Package	EchoSign
Description	
Display Type	<input type="radio"/> Detail Page Link View example <input checked="" type="radio"/> Detail Page Button View example <input type="radio"/> List Button View example
Behavior	Display in new window View Behavior Options
Content Source	URL

/apex/echosign_dev1__AgreementTemplateProcess?masterId={!Opportunity.Id}

ECHOSIGN GROUP MAPPINGS – MOVE USERS TO SPECIFIC ECHOSIGN GROUPS (NEW!)

If you choose not to use this feature, skip this section.

EchoSign for Salesforce supports the ability to easily synchronize users in specific Salesforce profiles to EchoSign groups. EchoSign groups are often used by companies to group users in the EchoSign account into different areas. (e.g. Sales US, Sales Europe, Sales Asia Pacific) By having different groups, you can create different settings in EchoSign or generate reports separately by group. If you don't have multiple EchoSign groups, you can skip this section since all of your users will belong to the Default group.

In Salesforce, you can set up mappings between Salesforce profiles and EchoSign groups by using the EchoSign Group Mappings page. You can also create new EchoSign groups directly within Salesforce.

EchoSign Group Mappings Editor Sync Users Preview Updates Save Cancel EchoSign H

Set up EchoSign Group Mappings to specify which EchoSign groups your Salesforce users should belong to. By default, users are put into the EchoSign Default group. To move users to a specific EchoSign group, select the group from the dropdown menu in the Group Mappings table below and click on the Sync Users button to move users.

Create a New EchoSign Group

The EchoSign Group dropdown menu in the Group Mappings table below displays all the existing groups in your account. To create a new group, specify the group name in the text box below and click the Create button.

Group Name: Create

[View EchoSign Groups](#) [Manage Salesforce Users](#)

Group Mappings

Select All Deselect All

Sync Selection	Salesforce Profile	EchoSign Group
<input type="checkbox"/>	Authenticated Website	Default Group
<input checked="" type="checkbox"/>	Chatter External User	Default Group
<input type="checkbox"/>	Chatter Free User	Group 1
<input checked="" type="checkbox"/>	Chatter Moderator User	Group 2
<input checked="" type="checkbox"/>	Contract Manager	Group 3
<input checked="" type="checkbox"/>	Custom: Marketing Profile	Group 4
<input checked="" type="checkbox"/>	Custom: Sales Profile	Group 4

MOVE USERS TO DIFFERENT ECHOSIGN GROUPS

Follow these steps to set up Group Mappings and move users to their respective EchoSign groups:

1. Create the mappings between a Salesforce profile to a EchoSign group. You can map multiple Salesforce profiles to a single EchoSign group.
2. Check the 'Sync Selection' box for any mapping row that you would like to Sync.
3. Click the 'Save' button to save the mappings or 'Cancel' to discard the changes.
4. To move any users to their respective EchoSign groups, click on the 'Sync Users' button on the group mappings page. You will be first be shown a preview of users that will be moved before you confirm the synchronization by clicking on 'Sync Users' in the preview window.

5. After the sync, you will be shown a confirmation of which users were moved successfully.
6. Note that any Salesforce user in these profiles, who are not EchoSign users, will not be affected by this synchronization. Also, any new user created when using EchoSign for Salesforce will be created automatically into the correct group mapping based on the saved mappings that have been checked for Sync Selection.

AUTO-SYNC USERS WHEN SALESFORCE PROFILE CHANGES

There is an optional setting you can turn on to automatically sync users when their Salesforce profile has changed from one profile to another profile. Go to Setup / Develop / Custom Settings / (Manage) EchoSign Settings. Click the 'Edit' button and check the box called 'Auto-Sync Group Mappings'. This will enable the feature that will move the users automatically when their profile changes. (e.g. from Marketing profile to Sales profile) The synchronization will move the user to the correct EchoSign group based on the mappings saved and selected on the Group Mappings page.

EchoSign Settings Edit

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

Edit EchoSign Settings Save Cancel

EchoSign Settings Information

Location Acme Corporation

--DEPRECATED - Do Not Use--

EchoSign API Server URL Override

Action Window Type

Add Audit PDF to Attachment List

--DEPRECATED - Do Not Use--

Add Signed PDF as Separate Attachments

--DEPRECATED - Do Not Use--

Add Supporting Files to Attachment List

Allow Sending On Behalf of Others

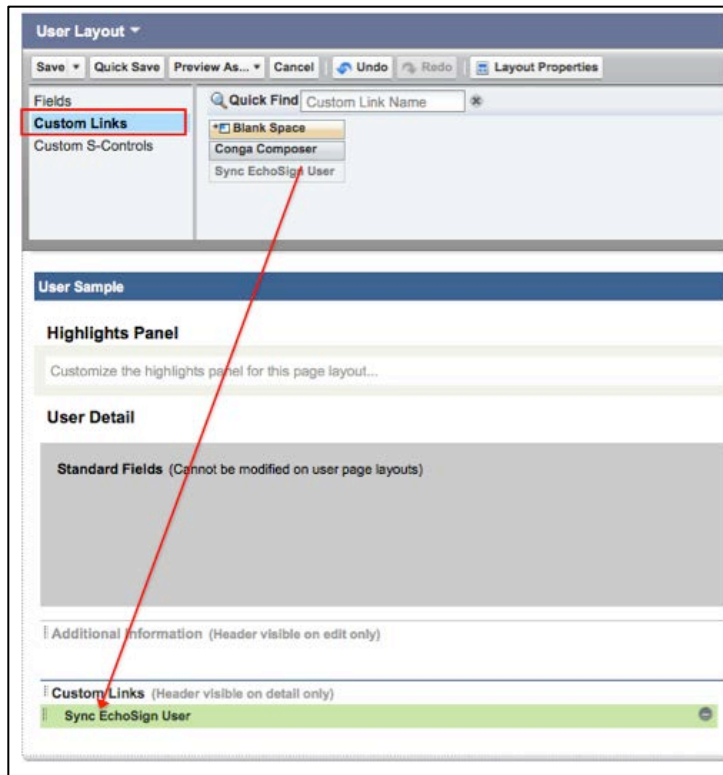
Auto-Sync Group Mappings

Callback URL EchoSign to Salesforce Site

If you don't have this auto-sync setting turned on and you would like to manually sync a user's group from the User record, you can add a link on the User page layout which allows you to manually force the synchronization to move a single user to the correct EchoSign group based on the mappings saved and selected on the Group Mappings page.

To add this sync link on the User page layout, follow these instructions:

- Go to Setup / Customize / Users / Page Layouts and click the 'Edit' button.
- Click on Custom Links and drag the 'Sync EchoSign User' link from the top of the page to the 'Custom Links' section of the page. Click the 'Save' button.



After adding this link, it will appear on every User detail page so that a manual sync of a single user can be done when the link is clicked on. To move users in bulk, use the EchoSign Group Mappings page to sync users.

UPDATING SALESFORCE WITH AGREEMENTS SENT WITH THE ECHOSIGN API, WIDGETS, OR FROM ECHOSIGN.COM (PUSH AGREEMENTS)

You can use [EchoSign's web services API](#) to send agreements for signature or create Widgets and embed them on your website and have all those agreements pushed and created in Salesforce.com just as if they were sent from Salesforce.com. You can also send agreements via the EchoSign.com web application and have them all pushed back to Salesforce.

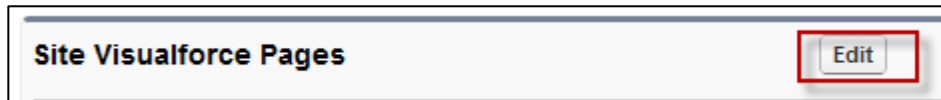
Note: This feature is **not** supported in Salesforce Professional Edition.

To enable this scenario, follow the following steps:

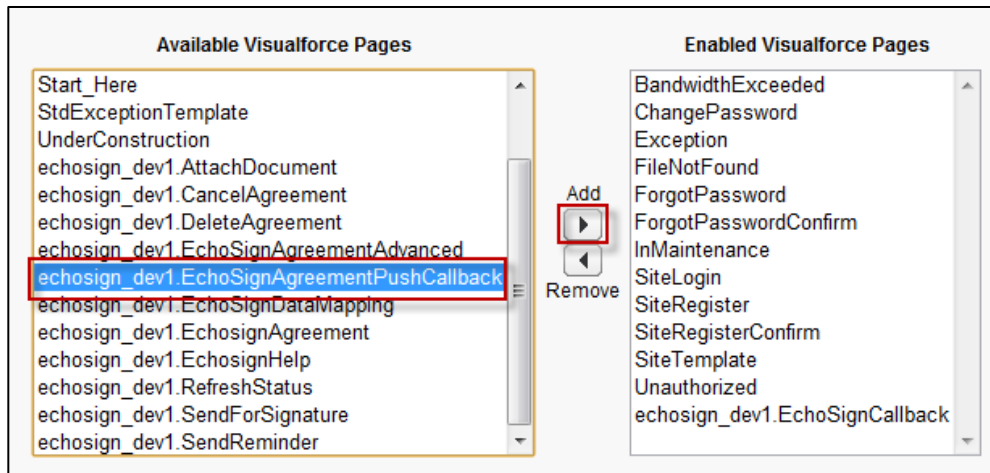
- If you have not configured the EchoSign Callback Site earlier, you will need to create a Salesforce Site to use this functionality (see instructions to [Configure Sites](#)).
- Next, add the 'EchoSignAgreementPushCallback' Visual Force page to the site. Go to Setup / Develop / Sites
- Click the Site name

Sites (echov11-developer-edition.na12.force.com)		
Action	Site Label ↑	Site URL
Edit Deactivate	EchoSignCallback	http://echov11-dev

- Under 'Site Visual Force Pages' click 'Edit'



- Select 'echosign_dev1.EchoSignAgreementPushCallback' and click 'Add'



- Click 'Save'
- **If you would like all of the agreements in your account that were sent outside of EchoSign to be created and pushed into Salesforce, follow these instructions:**
 - Copy the secure URL address from the EchoSign Callback Site you created and append '/echosign_dev1__EchoSignAgreementPushCallback' to compose the callback URL. Contact EchoSign Support (echosign@support.com) and provide them with your callback URL to set as your EchoSign account's default callback URL. For example: If your site address is '<https://echov11-developer-edition.na12.force.com/EchoSignCallback>', the callback URL will be 'https://echov11-developer-edition.na12.force.com/EchoSignCallback/echosign_dev1_EchoSignAgreementPushCallback'
 - EchoSign Support should also enter your EchoSign userID for the default callback URL API user setting. All accounts using Salesforce should also have their accounts set to append the document key to the callback URL.
- **If you are sending agreements via the API, follow these instructions:**
 - Copy the secure URL address from the EchoSign Callback Site you created and append '/echosign_dev1__EchoSignAgreementPushCallback' to create the callback URL to be used in the EchoSign API.
 - For example: If your site address is '<https://echov11-developer-edition.na12.force.com/EchoSignCallback>', the URL you should use in the EchoSign API will be 'https://echov11-developer-edition.na12.force.com/EchoSignCallback/echosign_dev1_EchoSignAgreementPushCallback'

- When sending an agreement or creating a widget through the API you will need to provide a callback URL (see <https://secure.echosign.com/redirect/latestApiMethods> and reference the API parameter 'CallbackInfo'.)
 - Also make sure that your account settings are set to append the document key to the callback URL that should be the default for Salesforce customers using EchoSign. For any issues, contact Adobe EchoSign support at support@echosign.com.
- Additionally, go to [Push Mappings settings](#) to define preferences for how records are created when agreements are pushed to Salesforce.

ECHOSIGN FOR SALESFORCE CUSTOMIZATION AND SETTINGS

Settings allow you to change the behavior of EchoSign for Salesforce and customize it to fit to your business needs.

EchoSign for Salesforce supports various custom settings:

- **EchoSign Settings** control which features are exposed to your EchoSign users and also sets the application's behavior. This is the main set of core settings for the application.
- **EchoSign Toolbar Settings** control which buttons appear in the EchoSign Toolbar.
- **EchoSign Merge Mapping Settings** control how attachments are handled whenever there is a merge mapping used.
- **EchoSign Push Mapping Settings** control how recipient records are created or updated when agreements created outside of Salesforce are pushed into Salesforce.
- **EchoSign Chatter Settings** control which agreement events will result in Chatter posts and where the Chatter posts will appear. These settings only appear if you have the EchoSign for Chatter app installed on your org.

Settings can be set for the entire Salesforce organization or for specific users and profiles

DEFAULT ORGANIZATION LEVEL SETTINGS

These settings affect all users and profiles in the organization, unless their settings override the default organization level settings (see below)

1. Click on your Name on top corner of page
2. Click Setup / App Setup / Develop / Custom Settings

Click on the 'EchoSign Settings' or 'EchoSign Toolbar Settings' or 'Merge Mapping Settings' or 'Push Mapping Settings'; link, as appropriate.

The examples below show 'EchoSign Settings'

Custom Settings Help for this Page ?

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. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Force.com Web Services API.

✔ **Percentage of custom settings data used: 0%**
 You are currently using 0 MB of custom settings data in your organization, out of an allowed limit of 2 MB.

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

New

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	EchoSign Merge Mapping Settings	Public	Hierarchy	echosign_dev1		120	0	0
Manage	EchoSign Push Mapping Settings	Public	Hierarchy	echosign_dev1		885	0	0
Manage	EchoSign Settings	Public	Hierarchy	echosign_dev1		2,175	0	0
Manage	EchoSign Toolbar Settings	Public	Hierarchy	echosign_dev1		180	0	0

3. Click on the Manage Button

Custom Setting Definition

EchoSign Settings

Create the fields for your custom setting. The data in these fields are cached with the application.

Custom Setting Definition Detail Manage

Label	EchoSign Settings	Object Name	SIGN_Settings
API Name	echosign_dev1__SIGN_Settings__c	Setting Type	Hierarchy
Visibility	Public	Description	
Namespace Prefix	echosign_dev1	Created Date	4/4/2012 9:31 PM
Last Modified Date	4/4/2012 9:31 PM	Record Size	2,175

4. Click the 'New' button (above the 'Default Organization Level Value' label) to create default custom settings for all users.

Custom Setting Help for this Page ?

EchoSign Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

New

▼ Default Organization Level Value

View: All ▾ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

New

Setup Owner ↑	Location
No records to display.	

5. Set the appropriate settings. Click 'Save'
6. For more details on each setting, see 'Available Settings' below

SETTINGS FOR SPECIFIC USERS AND PROFILES

Follow steps 1-4 above.

5. Click the 'New' button (above the 'Setup Owner' table) to create custom settings for specific Users or Profiles that override the Default Organization Level (if defined).

Custom Setting Help for this Page ?

EchoSign Settings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

New

▼ Default Organization Level Value

View: All ▾ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

New

Setup Owner ↑	Location
No records to display.	

6. Choose the user or profile you'd like to change these settings for and set values for the appropriate settings.

For more details on each setting, see the following 'Available Settings' section.

AVAILABLE ECHOSIGN SETTINGS

CUSTOM ECHOSIGN SETTINGS

Each of the settings has a question mark icon that you can click on to see the description of the setting. These settings give you the

- **EchoSign API Server URL Override** – Used for testing purposes only. Do not edit the value of this setting without consulting EchoSign Support.
- **Action Window Type** – Determine how EchoSign windows open in users' browsers. Enter 'Window' to open in new windows, enter 'Frame' to open as a layer on top of the Agreement page, or leave the field empty for the default behavior, which is to auto-detect based on the user's browser capabilities.
- **Add Audit PDF to Attachment List** – Check this box to attach the PDF of the audit trail to the Agreement record after the agreement is signed.
- **Add Signed PDF as Separate Attachments** – Check this box to attach the PDF of the signed agreements as separate attachments when there are multiple documents sent in a single transaction. To stop receiving the signed agreement as a merged PDF, please contact EchoSign Support for assistance.
- **Add Supporting Files to Attachment List** - Check this box to attach the PDFs of the supporting documents to the Agreement record after the agreement is signed. Through the supporting document fields in the agreement, the signers upload and attach the supporting documents to the agreement transaction.
- **Auto-Sync Group Mappings (NEW!)** – Check this box to automatically move the correct EchoSign groups when their Salesforce user profiles are updated.
- **Allow Sending on Behalf of Others** – Check this box to allow sending agreements on behalf of others.
- **Callback URL EchoSign to Salesforce Site** – Entering the Callback URL into this box is required when sending large transactions over 2.8MB. This setting is the Secure Web Address that is copied from the EchoSign Callback Site, which is set up to send large files. See [this section](#) in this document for additional instructions.
- **Disable Account Lookup** – Check this box to hide the Account lookup option on the send agreement page.
- **Disable Add Recipient** – Check this box to hide the option to add recipients on the send agreement page.
- **Disable Attach Agreement Attachments** – Check this box to hide the option to add new attachments on the send agreement page.
- **Disable Send Email Copies (NEW!)** – Check this box to hide the 'Send email copies to:' field on the send agreement page.
- **Disable Contact Recipient Type** – Check this box to hide the option to select a Contact as a recipient on the send agreement page.
- **Disable Delete Agreement Attachments** – Check this box to hide the option to delete agreement attachments on the send agreement page.
- **Disable Delete Recipient** – Check this box to hide the option to delete recipients on the send agreement page.
- **Disable Edit Agreement Attachments** - Check this box to hide the option to edit agreement attachments on the send agreement page.
- **Disable Email Recipient Type** – Check this box to hide the option to type an Email address as a recipient on the send agreement page.

- **Disable Knowledge Based Authentication (NEW!)** – Check this box to hide the Knowledge Based Authentication (KBA) identity verification option for agreements. This is a signer identity verification method that requires signers to provide and verify personal information to sign the document. Usage of this feature is limited and may incur added costs. Also, make sure your account send settings on EchoSign.com have KBA enabled so you can use it in Salesforce.
- **Disable Lead Recipient Type** – Check this box to hide the option to select a Lead as a recipient on the send agreement page.
- **Disable Opportunity Lookup** – Check this box to hide the Opportunity lookup option on the send agreement page.
- **Disable Preview or Position** - Check this box to hide the option to preview the document or position fields on the send agreement page.
- **Disable Sender Signs** – Check this box to hide the option for the sender to also sign the agreement.
- **Disable Sign Expiration** – Check this box to hide the option to set the number of days before the agreement will expire on the send agreement page.
- **Disable Signing Password** – Check this box to hide the option to set a password to required to sign an agreement.
- **Disable Sign Reminder** – Check this box to hide the option to set a reminder for signers on the send agreement page.
- **Disable Signature Type** – Check this box to hide the option select a signature type (e-Signature or Fax Signature) on the send agreement page.
- **Disable Upload Agreement Attachments** - Check this box to hide the option to upload agreement attachments on the send agreement page.
- **Disable User Recipient Type** – Check this box to hide the option to select a User as a recipient on the send agreement page.
- **Disable View Agreement Attachments** – Check this box to hide the option to disable viewing of attachments on the send agreement page.
- **Disable Password for Signed PDF** – Check this box to hide the option to set a password to open the PDF for the signed agreement.
- **Disable Web Identity Verification (NEW!)** – Check this box to hide the web identity verification option for agreements. Web identity verification requires signers to verify their identity by signing into one of the following sites: Facebook, Google, LinkedIn, Twitter, Yahoo!, or Microsoft Live. Also, make sure your account send settings on EchoSign.com have web identity enabled so you can use it in Salesforce.
- **Enable Hosted Signing Field** – Check this box to show the 'Host signing for the first signer' field on the agreement page to get in-person signatures.
- **Enable Mapping Error Notification (NEW!)** – Check this box to send email notifications to the data mapping or merge mapping owner any time there are errors when the mappings are executed.
- **Enable Recipient Approver Role (NEW!)** – Check this box to enable the option to mark any recipient as an Approver. Approvers review and approve the document but they are not required to sign it.
- **Enable Send Written Signature To Fax** – Check this box and EchoSign will attempt to use the recipient's fax number instead of the email address when sending an agreement for fax signature.
- **Enable Separate Signer Identity Methods (NEW!)** – Check this box to enable the option to select different identity verification methods for recipients in your EchoSign account and those outside of your EchoSign account. This applies to knowledge based authentication (KBA), web identity verification, and password to sign. For example, you can require that a customer be verified with Knowledge Based Identity before signing the document but require that your sales manager instead provide a password to

sign the document. If you don't check this box, then all signers or approvers will verify using the same method, as selected by the sender.

- **Override Recipient Field List** – This field allows you to change the default set of agreement fields that determine which Agreement fields are used when selecting the recipient for an agreement when sending for signature. When used, this setting should contain a list of comma-separated API field names from the agreement record. The field names should be in order and represent the fields the recipients should be read from. (e.g. SignerA_Email__c,SignerB_Email__c)
- **EchoSign Server URL Override** - Used for testing purposes only. Do not edit the value of this setting without consulting EchoSign Support.
- **Wipe Agreement Password** – Check this box to not store in Salesforce the encrypted password field on the agreement after it is sent. This applies to the password that is set to sign or view the agreement.

ECHOSIGN TOOLBAR SETTINGS

Toolbar settings allow you to control which EchoSign toolbar actions will be available in your account. You may create different toolbar settings for different profiles or users.

- **Cancel (Draft)** - Available only when an agreement was not yet sent. Clicking this button would delete the agreement in Salesforce. This button is hidden by default.
- **Cancel Agreement** - Cancels an agreement after it was sent for signature, but keeps the record in Salesforce.
- **Delete Agreement** - Cancels an agreement after it was sent for signature and deletes the record from Salesforce.
- **Save Agreement** - Saves the agreement.
- **Send Agreement** - Sends an agreement for signature.
- **Send Reminder** - Send a reminder to the current signer.
- **Update Status** - Queries EchoSign to update the status of the agreement in Salesforce.
- **View Agreement** - Opens the EchoSign 'View Agreement' page allowing the user to view it and perform additional tasks.

ECHOSIGN MERGE MAPPING SETTINGS

Merge mapping settings allow you to control which how the attachments will be managed when merge mappings are used for sending agreements. Reference merge mappings documentation for more information.

- **Attach Merged Document** - When a merge mapping is used for an agreement, selecting this option will attach the document with the merged data into the agreement record after the agreement is sent.
- **Remove Original document** - When a merge mapping is used for an agreement, selecting this option will remove the original template document from the agreement record after the agreement is sent.

ECHOSIGN PUSH MAPPING SETTINGS

Push mapping settings allow you to control how recipient records are created or updated when agreements created outside of Salesforce are pushed into Salesforce. Reference the agreement [push mapping documentation](#) for more information about how to set up Salesforce so that documents created elsewhere can also be created in Salesforce automatically.

- **Copy Contact Account** – Selecting this option will copy the first Contact recipient's Account lookup to the Agreement's Account lookup.
- **Copy Contact Opportunity** - Selecting this option will copy the first Contact recipient's Opportunity lookup to the Agreement's Opportunity lookup.
- **Auto Create Recipient Object** – This field is used to specify which recipient type to create (Contact or Lead) when there is no existing contacts in Salesforce that match the original agreement's recipient. Type in 'Contact' or 'Lead' into this field based on the preference. The recipient lookup is also based on the entry in the 'Recipient Lookup Order' field.
- **Recipient Lookup Domain Ignore List** – If a recipient's email belongs to one of the domains that is entered in this field, there will be no recipient matching performed and the recipient will be stored as an email address in Salesforce.
- **Recipient Lookup Order** – This field determines the order by which recipients from the agreement are searched for in Salesforce. For example, enter 'Contact, Lead, User' into this field if that is the order you want to find recipients.

ECHOSIGN CHATTER SETTINGS

EchoSign Chatter Settings will appear if you have the EchoSign for Chatter app installed on your org. These settings determine where to post Chatter updates and also which events will result in a Chatter post. You only should define one set of Chatter settings for your Org and you can provide a Name to the settings. You can learn more about EchoSign for Chatter [here](#) with instructions for installation and setup.

- **Post on Account Record** - Post Chatter updates for EchoSign agreements on the related Account record.
- **Post when Agreement Cancelled** - Post Chatter update when agreement is cancelled.
- **Post when Agreement Declined** - Post Chatter update when agreement is declined.
- **Post when Agreement Expires** - Post Chatter update when agreement expires.
- **Post on Agreement Record** - Post Chatter updates for EchoSign agreements on the Agreement record.
- **Post when Reminders Sent** - Post Chatter update when reminders are sent.
- **Post when Agreement Sent** - Post Chatter update when agreement is sent.
- **Send Notifications to Sign Agreements** - Post private Chatter message to signer when an agreement needs the signer's signature.

- **Post when Agreement Signed or Approved** - Post Chatter update when agreement is signed and approved.
- **Post when Agreement Viewed** - Post Chatter update when agreement is viewed.
- **Post on Contract Record** - Post Chatter updates for EchoSign agreements on the related Contract record.
- **Enable EchoSign Chatter Updates** - Enable this setting to turn on Chatter updates for EchoSign agreements.
- **Post on Opportunity Record** - Post Chatter updates for EchoSign agreements on the related Opportunity record.
- **Post when Recipient Email Bounces** - Post Chatter update when recipient email bounces and is not delivered.

Note: There is another Chatter setting in the main EchoSign Settings. By default, the Agreement record will be enabled for Chatter feeds but you can turn it off through the setting called 'Disable Agreement Chatter Feed'.

ADDING CUSTOM FIELDS AND RELATED OBJECTS TO THE AGREEMENT PAGE

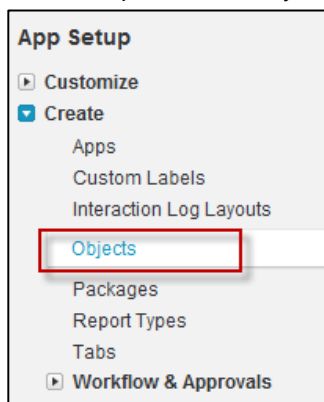
This section addresses customizing the default 'EchoSign Agreement Advanced' page. These customizations are not available when using the 'EchoSign Agreement Basic' page. See [Select EchoSign Agreements Page Style](#) for more information.

ADDING CUSTOM FIELDS

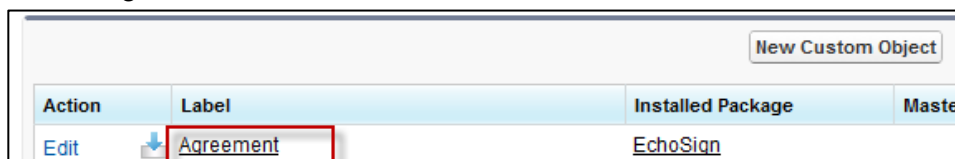
Using Field Sets, you can add fields you would like to view and edit when viewing the agreement page. You may use the EchoSign built-in field set and then add one or more fields from the Agreement Object that will be displayed on the agreement page.

EchoSign already has a built-in field set you can use. Follow the steps below to customize it:

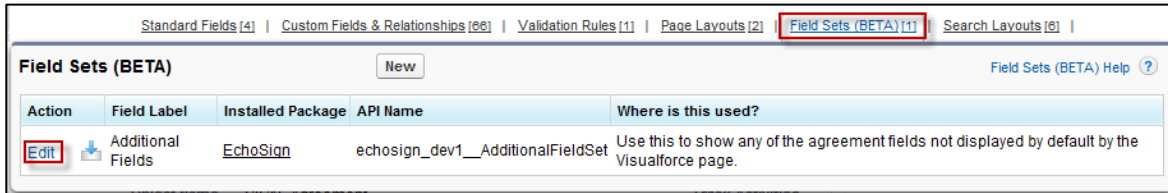
- Go to Setup / Create / Objects



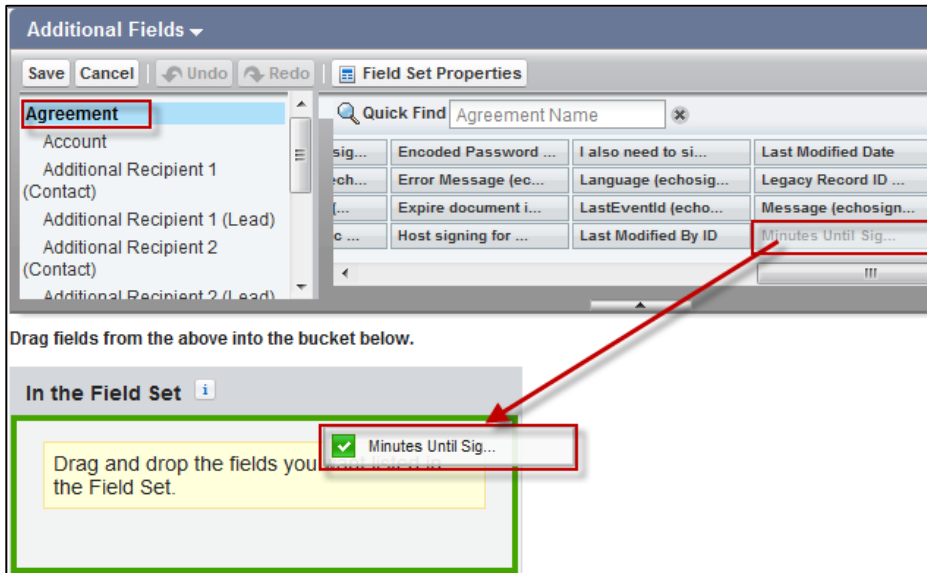
- Click on 'Agreement'



- Mouse over 'Field Sets (Beta)' at the top and click 'Edit'



- Select the field you want to add and drag it into the 'In the Field Set' rectangle. Notice that EchoSign only supports fields from the Agreement object and not from other objects.



- Click 'Save'
- When you look at the agreement, a new section will appear with the fields you have selected:

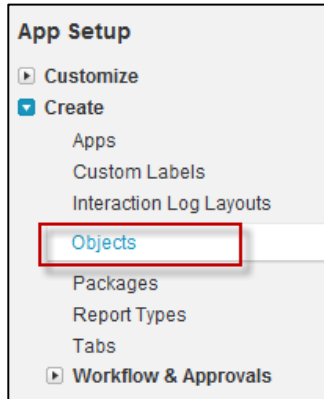


ADD RELATED OBJECTS TO THE AGREEMENT PAGE

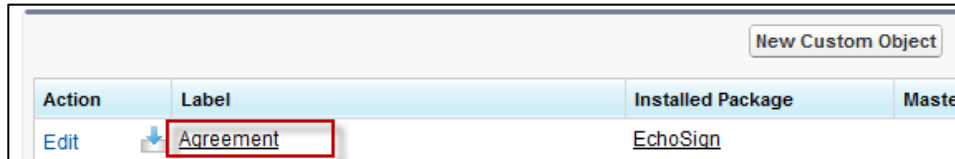
You may associate EchoSign Agreements with Salesforce objects of your choosing (standard or custom objects). This enables you to create Agreements that are linked to those objects and that show all the Agreements that relate to an object on that object's page. By default, it is related to Opportunity and Account.

The instructions below describe how to associate Agreements with a Quote object, but they can be applied to any other object in your Salesforce Organization.

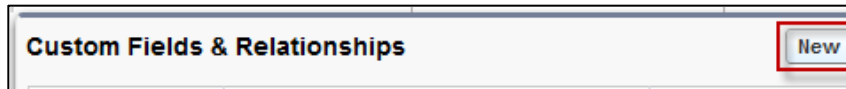
- Go to Setup / Create / Objects



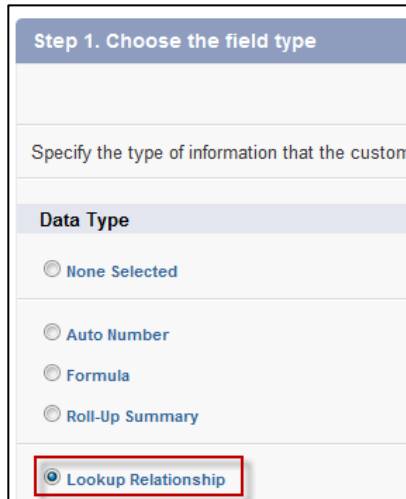
- Click on 'Agreement'



- Click 'New' on 'Custom Fields & Relationships'



- Select 'Lookup', Click 'Next'



- Choose 'Quote' from the drop-down list. Click 'Next'

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: --None--

- Account
- Agreement
- Agreement Event
- Asset
- Business Hours
- Campaign
- Case
- Community
- Contact
- Contract
- Echosign Recipient
- Idea
- Lead
- Opportunity
- Product
- Quote**
- Quote Line Item

- Click 'Next' in steps 3, 4 and 5
- In Step 6, ensure that the 'Add Related List' check box is checked, then click 'Save'.

Step 6. Add custom related lists Step 6 of 6

Previous Save & New **Save** Cancel

Field Label: Quote
Data Type: Lookup
Field Name: Quote
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Quote Layout

Append related list to users' existing personal customizations

ADVANCED SIGNER AUTHENTICATION METHODS (NEW!)

When signers receive documents to sign or approve, you can add an additional layer of authentication before they can view the document. Often times, adding a password to sign the agreement is sufficient but in other cases, more advanced verification methods may be desired.

EchoSign for Salesforce supports 3 signer verification methods:

- **(New!)** Knowledge Based Authentication – Answer questions to verify signer identity
- **(New!)** Web Identity Authentication– sign in with Facebook, LinkedIn, Google, etc. before signing
- Password to sign agreement

You can apply these authentication methods for internal or external signers or all signers.

- E.g. External signers need verify their identity using Knowledge Based Authentication while internal

signers need to verify using a password

Security Options

Verify identity for signers not in my account

Password to sign agreement

Knowledge based authentication

Web identity authentication

Verify identity for signers in my account

Password to sign agreement

Knowledge based authentication

Web identity authentication

To take advantage of this functionality, make sure you have the EchoSign Custom Settings set for knowledge based authentication and web identity.

- **Disable Knowledge Based Authentication**– Check this box to hide the Knowledge Based Authentication (KBA) identity verification option for agreements. This is a signer identity verification method that requires signers to provide and verify personal information to sign the document. Usage of this feature is limited and may incur added costs. Also, make sure your account send settings on EchoSign.com have KBA enabled so you can use it in Salesforce.
- **Disable Web Identity**– Check this box to hide the web identity verification option for agreements. Web identity verification requires signers to verify their identity by signing into one of the following sites: Facebook, Google, LinkedIn, Twitter, Yahoo!, or Microsoft Live. Also, make sure your account send settings on EchoSign.com have web identity enabled so you can use it in Salesforce.
- **Enable Separate Signer Identity Methods** – Check this box to enable the option to select different identity verification methods for recipients in your EchoSign account and those outside of your EchoSign account. For example, you can require that a customer be verified with Knowledge Based Identity before signing the document but require that your sales manager instead provide a password to sign the document. If you don't check this box, then all signers or approvers will verify using the same method, as selected by the sender.

KNOWLEDGE BASED AUTHENTICATION (KBA)

- Knowledge Based Authentication (KBA) requires signers and approvers to prove their identity by answering questions taken from hundreds of public and commercial databases. This functionality is powered by RSA and only available in the United States.
- When verified, the name associated with the signature is taken from the user's authenticated name and cannot be changed at the time of signing. The audit trail captures identity verification details.

- KBA usage is limited per account, per month. Contact Sales for more information.

This Document Requires Identity Verification

Please Enter the Following Details:

First Name

Last Name

Address

Last 4 Digits of Your Social Security Number (Optional)

After clicking "OK" below you will be presented with a list of questions designed to validate your identity.

I agree to provide my personal information in order to validate my identity.
Identity verification powered by RSA. (Privacy policy)

OK

This Document Requires Identity Verification

Please Answer the Following Questions:

1. Which one of the addresses below have you ever lived at?

1294 Main st. Chicago, IL

10451 3rd st. New York, NY

1508 Wright Ave. Sunnyvale, CA

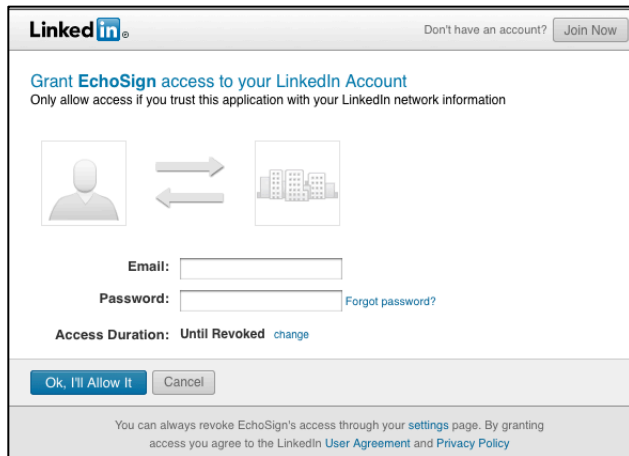
None of the above

WEB IDENTITY VERIFICATION

- Web identity verification requires signers and approvers to prove their identity by authenticating through a 3rd party Web service: Google, LinkedIn, Facebook, Microsoft Live, Yahoo!, Twitter
- When verified, the name associated with the signature is taken from the user's authenticated name and cannot be changed at the time of signing. The audit trail captures identity verification details.

This Document Requires Identity Verification

Validate your identity by signing in to one of the following services:



ECHOSIGN FOR CHATTER FEATURES

Adobe EchoSign is Chatter Enabled! Get real-time Chatter updates when:

- agreements are sent, viewed, signed, declined, cancelled, not delivered
- agreements expire or reminders sent
- agreement you need to sign

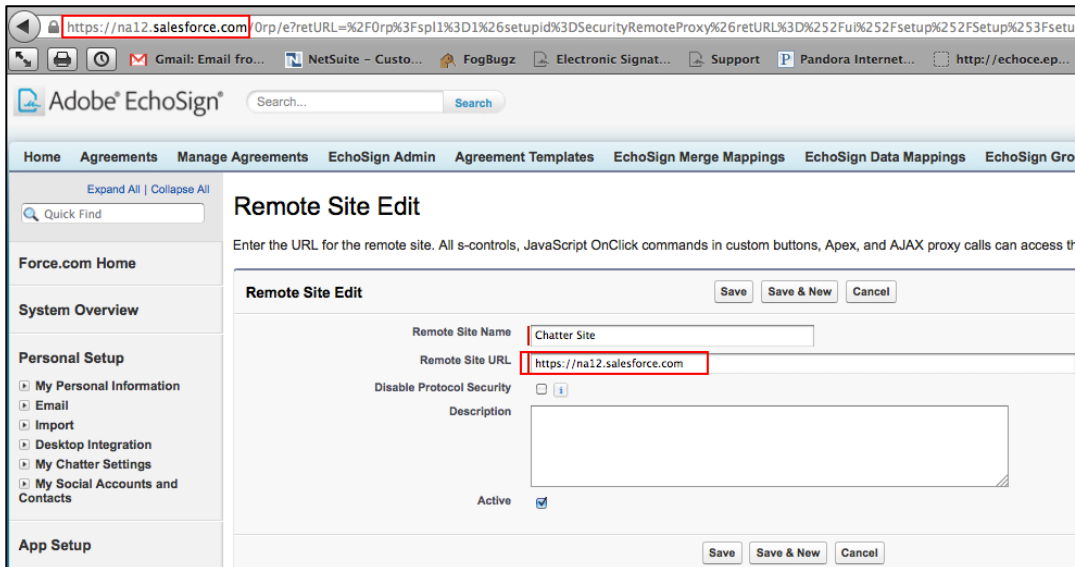
Follow Chatter updates on Agreement, Account, Contract, and Opportunity. Collaborate across your organization to close more deals.



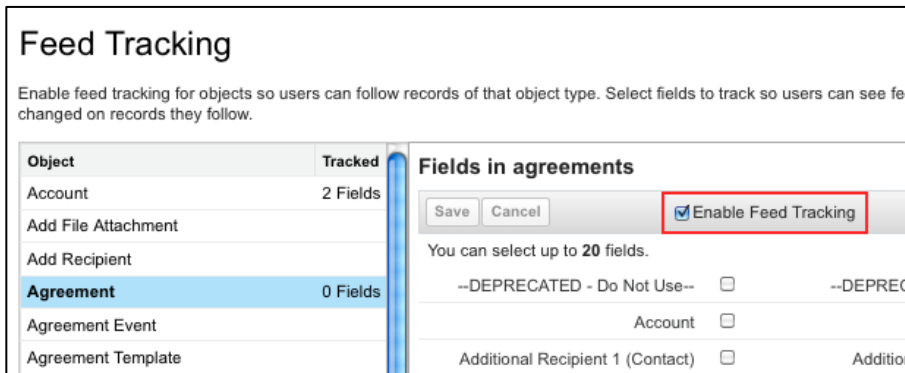
SETUP INSTRUCTIONS

- 1) After installation the EchoSign for Salesforce app, you can configure which Chatter updates you want your users to see. Go to Setup / Develop / Custom Settings / Chatter Settings. You only should define one set of Chatter settings for your Org and you can provide a Name to the settings. Click here to learn more about how to set up [Chatter Settings](#).

- 2) Additionally, to enable Salesforce so that signers in your Org can get personal Chatter messages when they have a document to sign, you need to go to Setup / Security Controls / Remote Site Settings to add a New Remote Site.
- 3) Copy the first part of your web page URL (e.g. <https://abchostname.salesforce.com>) with the Salesforce Org domain and enter it to the Remote Site URL field. This URL may vary across different Orgs so make sure to enter the one specific to your Org.



- 4) Click the 'Save' button.
- 5) Make sure also that Chatter feeds are enabled for the Agreement record. Go to Setup > Customize > Chatter > Feed Tracking > Agreement
- 6) Check the box 'Enable Feed Tracking'



ECHOSIGN STEP BY STEP GUIDED WALK-THRU – GET THE BROWSER ADD-IN

Install the EchoSign Walk-Thrus browser add-in and get step-by-step guidance on how to use key features in Adobe EchoSign for Salesforce. This is helpful for administrators who are configuring EchoSign document workflows and setting up merge mappings, data mappings, agreement templates, and more. This browser add-in is powered by Walkme.

EchoSign Walk-Thru is free for EchoSign customers and can be downloaded and installed from your Chrome, Firefox, Internet Explorer, or Safari browser by visiting this site:

<http://www.walkme.com/download-adobe>

AUTOMATION AND BACKGROUND ACTIONS

Adobe EchoSign for Salesforce has the ability to turn on background actions for agreements to automate workflows. This includes: sending agreements, sending reminders, updating agreement status, deleting agreements or canceling agreements.

BACKGROUND ACTIONS

- Through automatic workflows or triggers, Salesforce can automatically send a document for signature without additional user intervention. You can also set up trigger or workflows to send reminders and to delete, cancel, or update agreements automatically. To do so, you may need to allow users or workflows to send on behalf of another user.
- Background actions are enabled via an Agreement picklist field called 'Background Actions'. When the field switches from one value to another, the action is triggered. Make sure to trigger actions that are only allowed for the status of the Agreement. (E.g. you cannot send a reminder for an agreement that is already in the cancelled status.) Make sure the EchoSign API key for your account is set in Salesforce via the EchoSign Admin tab.
- Also, you can enable the 'Send to EchoSign' button to automatically send agreements using a predefined Agreement Template without requiring user to view the agreement page first. This is achieved by checking the box 'Auto Send' on the Agreement Template. Go to the [Agreement Templates section](#) of this customization guide for more information.

INSTRUCTIONS TO ENABLE 'SEND ON BEHALF OF' FUNCTIONALITY

You may want to enable the 'Send on Behalf of' functionality if there are cases when someone in your Salesforce org is required to send agreements on behalf of another person. Follow the steps below to ensure that this is set up properly.

1. The ability to send on behalf of another user works only on EchoSign for Salesforce v11.7 or later.
2. This feature works for any agreement sending including background sending, which is triggered through an update of the Agreement field 'Background Actions' or through the 'Auto Send' option in Agreement Templates. You can also set a lookup to a user in an Agreement Template to 'Send on Behalf of' so that it is automatically populated when the agreement is generated.
3. The EchoSign API key for the EchoSign account needs to be set in Salesforce on the EchoSign Admin page. The user you are sending on behalf of must be a user under the same account as the API key that was associated with your Salesforce instance.
4. In EchoSign Settings, make sure the 'Allow Sending on Behalf of Others' of checkbox is checked. To set this up, go to Setup / Develop / Custom Settings / EchoSign Settings / 'Edit'.
5. In the User record layout, add the field 'EchoSign – Allow Sending as Other Users' by dragging it to the layout. Go to Setup / Customize / Users / Page Layouts / 'Edit'.
6. For the specific user that you want to send on behalf of, you need to check the box on his or her User record called 'EchoSign – Allow Sending as Other Users'
7. In the Agreement page layout, add the field call 'Send On Behalf Of' by going to Setup / Create / Objects / Agreement / Field Sets (BETA) / 'Edit'. Drag the field into the Field Set.
8. When setting up the agreement to send, the field 'Send on Behalf of' needs to be

populated with the user that has allowed other users to send on their behalf.

ONLOADACTIONS (NEW!)

Salesforce can automatically trigger actions via the onLoadAction URL parameter supported by EchoSign for the Agreement button actions: Send, Remind, Delete, Cancel, Update, and View. The URL parameter will respect the [Toolbar Settings](#) set by the administrator so that only those that are enabled will be available.

Example of URLs with onLoadAction:

- **Send:** Make sure you have an agreement with status Draft in your account.
 - [https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=\[agreementID\]&sfdc.override=1&onLoadAction=send](https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=send)
- **Remind:** Make sure you have an agreement with status Out for Signature in your account.
 - [https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=\[agreementID\]&sfdc.override=1&onLoadAction=remind](https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=remind)
- **Delete:** Make sure you have an agreement with status Out for Signature in your account.
 - [https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=\[agreementID\]&sfdc.override=1&onLoadAction=delete](https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=delete)
- **Cancel:** Make sure you have an agreement with status Out for Signature in your account.
 - [https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=\[agreementID\]&sfdc.override=1&onLoadAction=cancel](https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=cancel)
- **Update:** Make sure you have an agreement with status Out for Signature in your account.
 - [https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=\[agreementID\]&sfdc.override=1&onLoadAction=update](https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=update)
- **View:** Make sure you have an agreement with status Draft, Out for Signature, Signed, or Cancelled in your account.
 - [https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=\[agreementID\]&sfdc.override=1&onLoadAction=view](https://echosign-dev1.ap1.visual.force.com/apex/EchoSignAgreementAdvanced?id=[agreementID]&sfdc.override=1&onLoadAction=view)

REQUIRE USERS TO SIGN-ON TO SALESFORCE TO ACCESS ECHOSIGN ACCOUNT

Through SAML (Security Assertion Markup Language) settings, EchoSign can be integrated with Salesforce.com so that your users are required to log in to Salesforce.com to gain access to their EchoSign accounts. This provides benefits in security and access control. For example if a user is disabled from Salesforce, they will not have access to their EchoSign account.

To do so, Salesforce will need to be configured as a SAML provider and EchoSign will need to be configured to use SAML so that only valid Salesforce.com users can log in to an EchoSign account. The simple setup instructions can be found in the [EchoSign guide for setting up SAML](#).

GRANTING ACCESS TO ADDITIONAL PROFILES

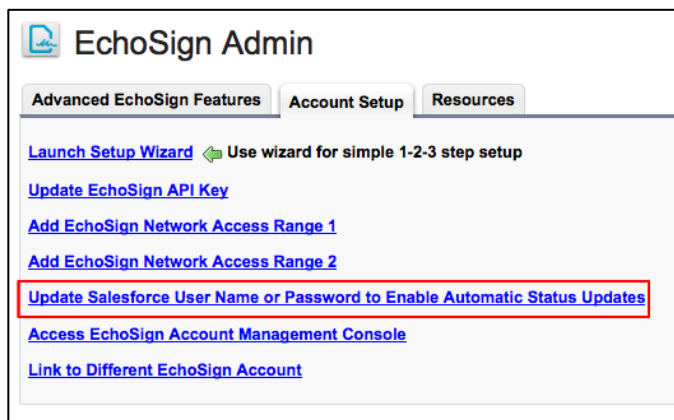
During installation, you may have only granted Administrators access to EchoSign for Salesforce. If you need to

extend access to additional user profiles, please refer the documentation for [Granting Profile Access](#) for EchoSign for Salesforce.

UPDATING EMAIL ADDRESSES OR PASSWORDS

ADMINISTRATOR SALESFORCE ACCOUNT PASSWORD CHANGES

If the Salesforce password or username has changed for the account linked to EchoSign for your Salesforce Org, remember to update it so that status updates continue to work properly for agreements in your Org. Go to the EchoSign Admin page and click on the Account Setup tab. Then select the link: 'Update Salesforce User Name or Password to Enable Automatic Status Updates'.



USER EMAIL ADDRESS CHANGES

If any user in the Org has an email change in Salesforce, make sure to also change the user's email address in EchoSign. The only way to do that is for the admin or the user to log into EchoSign.com to update the password. You can reference [this guide](#) for instructions on how to update your email address.

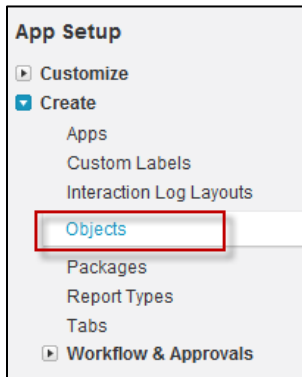
ECHOSIGN FOR SALESFORCE PROFESSIONAL EDITION - ADDITIONAL INSTALLATION STEPS

If you are using Salesforce Professional Edition, please make sure to follow the instructions in the following sections after completing the standard installation steps.

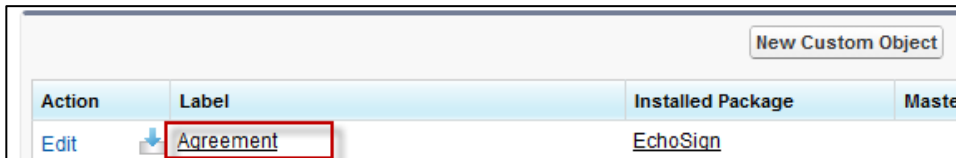
Note: Sending files over 2.8MB is not supported in the Professional edition.

ADDING FIELDS TO THE AGREEMENTS PAGE LAYOUT

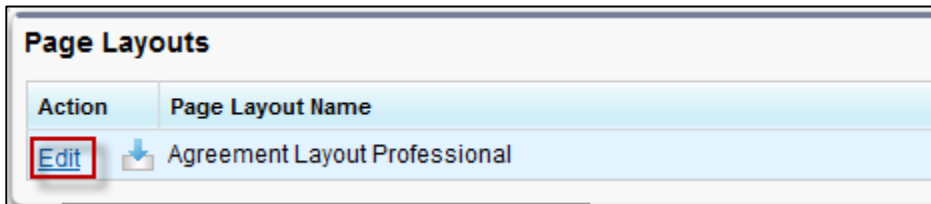
- Go to Setup / Create / Objects



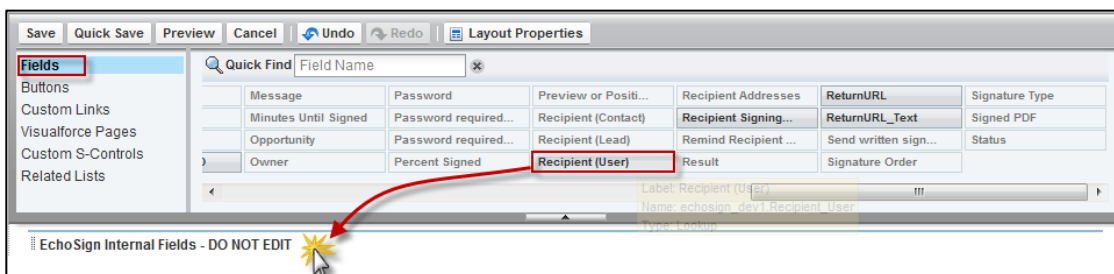
- Click on 'Agreement'



- In the Page Layouts section, click 'Edit' next to the Agreement Layout Professional



- Drag and drop the following fields into the page layout
 - Recipient (User)
 - Additional Recipient 1 (User)
 - Additional Recipient 2 (User)
 - Additional Recipient 3 (User)
 - Enable Automatic Reminders
 - Recipient Addresses
 - Merge



- Click 'Save'

ADDING FIELDS TO THE ECHOSIGN RECIPIENT PAGE LAYOUT

- Go to Setup / Create / Objects
- Click on 'EchoSign Recipient'
- In the Page Layouts section, click 'Edit' next to the EchoSign Recipient Layout Professional
- Drag and drop the following fields into the page layout
 - Agreement
 - Contact
 - Email Address
 - Lead
 - Order Number
 - Person Account
 - Recipient Type
 - useEmailAddress
 - User
 - Merge
- Click 'Save'

ECHOSIGN INTEGRATION WITH OTHER SALESFORCE APPS

EchoSign is integrated with several Salesforce apps that allow you to extend your Salesforce workflows even further. Learn more about each of these apps and get them on the AppExchange.

ADVANCED DOCUMENT GENERATION

- [Conga Composer](#)
- [Drawloop](#)

SUBSCRIPTIONS & BILLING

- [Zuora](#)

CONTRACT, PROPOSAL, AND QUOTE MANAGEMENT

- [Apttus](#)
- [BigMachines](#)
- [Selectica](#)

APPENDIX

SELECT ECHOSIGN AGREEMENTS PAGE STYLE (ADVANCED OR BASIC)

EchoSign for Salesforce has two page styles to create, edit, and view agreements. The default is the Advanced layout and is the recommended layout. Below is some information about the differences between the layout as well as instructions for how to change to the Basic page layout.

THE 'ECHOSIGN AGREEMENT ADVANCED' PAGE STYLE (DEFAULT)

This page which is set as the default style allows you to create an EchoSign Agreement on a single page – specify recipients, names the agreement, select options, attach files and send. This page also gives you more flexibility in specifying the number and type of recipients for each agreement.

THE 'ECHOSIGN AGREEMENT BASIC' PAGE STYLE

This page uses the standard Salesforce.com page layout to view and edit the agreement. Sending a new agreement requires a few more clicks -- creating an agreement, saving it and then attaching files on a separate screen. This page allows you to customize the page layout (adding and removing your own custom fields and custom options) but does not provide the same flexibility in selecting the number and type of recipients as the Advanced Agreement page does.

To use the EchoSign Agreement Basic page instead of the default Advanced page, follow the instructions in the next sections:

1. [Setting the 'EchoSign Agreement Basic' page layout](#)
2. [Setting up the Agreement buttons to work for your page layout](#)

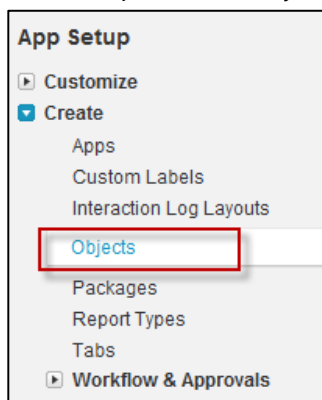
SETTING THE 'ECHOSIGN AGREEMENT BASIC' PAGE STYLE

If you choose to use the 'EchoSign Agreement Basic' page, follow the instructions below to ensure that your Salesforce.com page layouts are properly configured

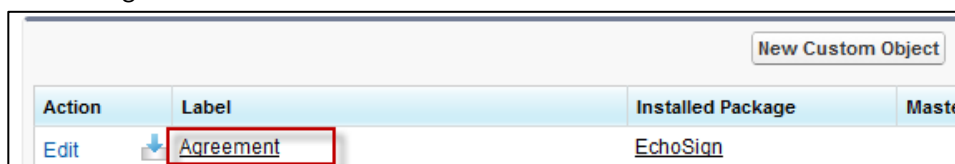


Note: This section only applies to customers with Salesforce.com Enterprise and Unlimited editions.

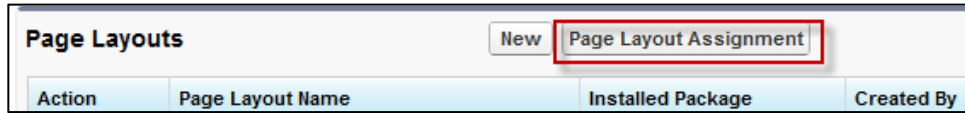
- Go to Setup / Create / Objects



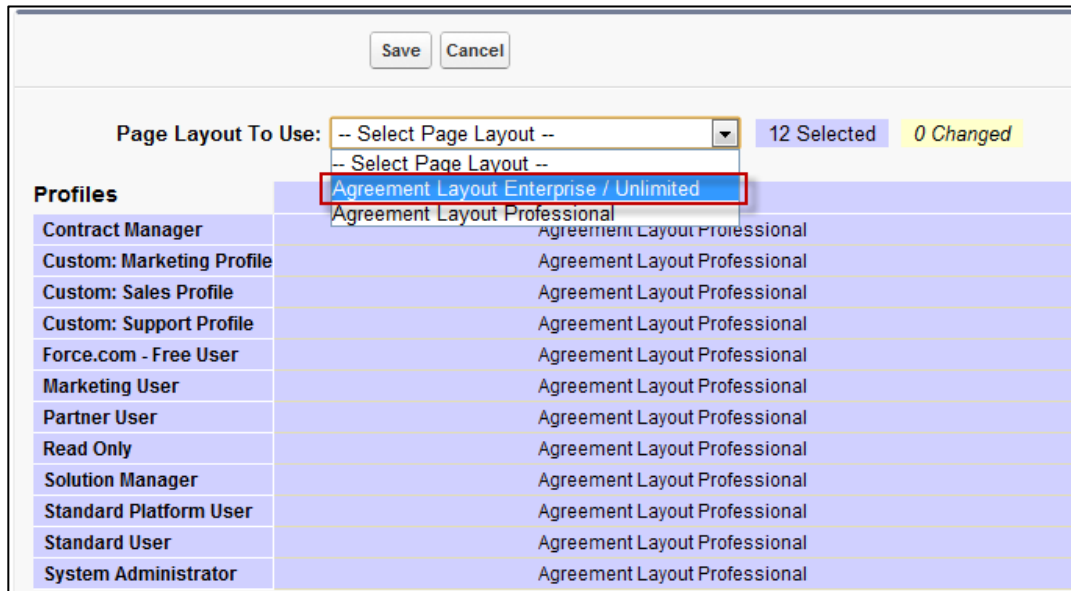
- Click on 'Agreement'



- Click 'Page Layouts' and then 'Page Layout Assignment'



- Click 'Edit Assignment', select all the profiles, select 'Agreement Layout Enterprise / Unlimited' from the drop down list and click 'Save'

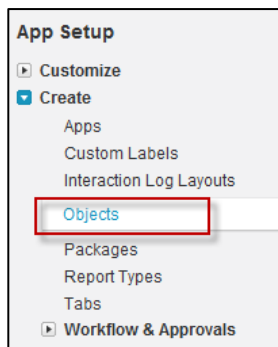


SETTING UP THE AGREEMENTS BUTTONS TO WORK FOR YOUR PAGE STYLE

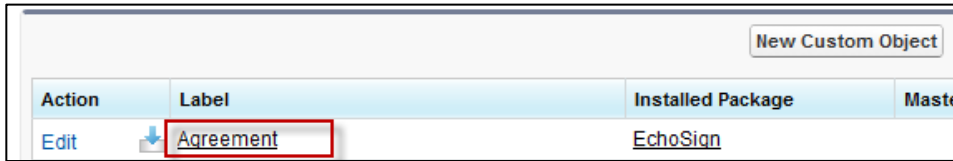
For the layout to take in effect, you also need to update the buttons on the layout.

Follow the instructions below to ensure your Salesforce.com pages are set up properly for the agreement related buttons:

- Go to Setup / Create / Objects



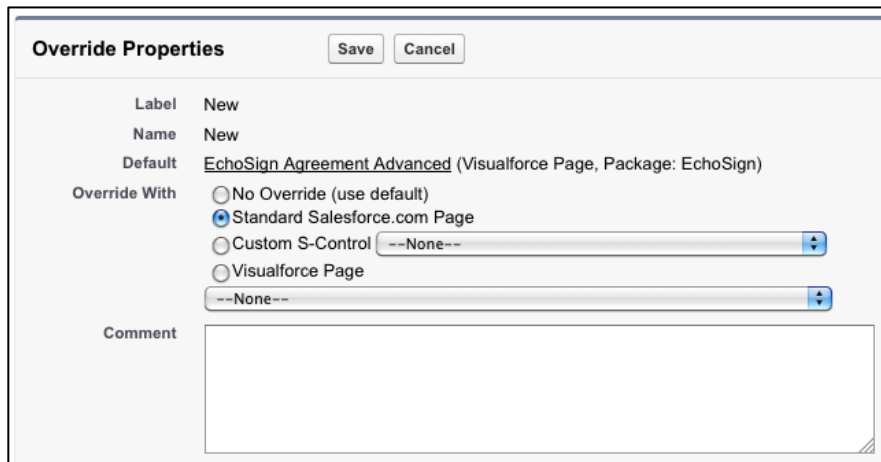
- Click on 'Agreement'



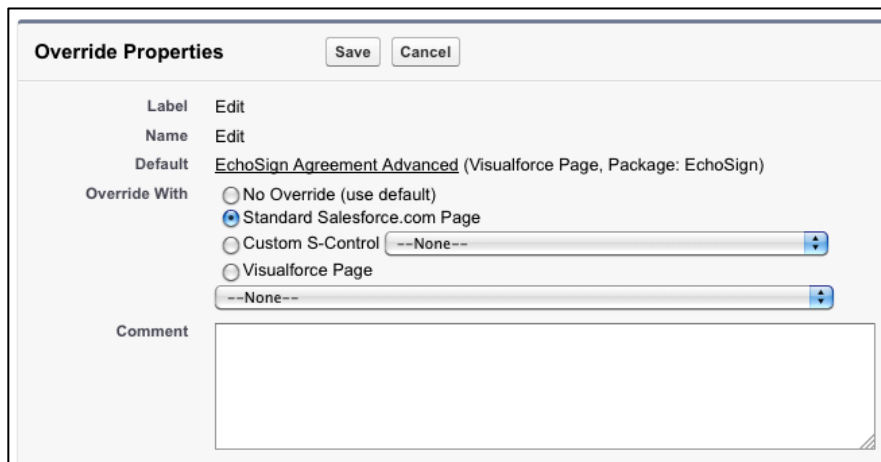
- Click 'Standard Buttons and Links'

SETTING UP THE AGREEMENT BUTTONS FOR 'ECHOSIGN AGREEMENT BASIC' PAGE STYLE

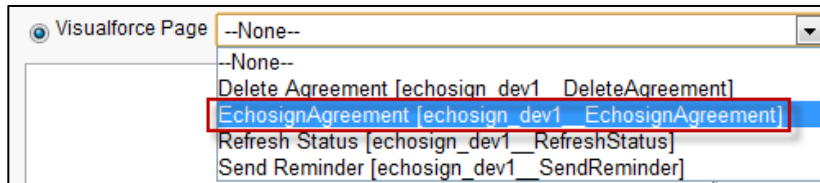
- Click 'Edit' next to the Button label 'New' and set it to 'Standard Salesforce.com Page'



- Click 'Edit' next to the Button label 'Edit' and set it to 'Standard Salesforce.com Page'



Click 'Edit' next to the Button label 'View', select the 'Visualforce Page' and select 'EchoSign Agreement' from the list.



- At the end of the process, you should have the following setup:

Standard Buttons and Links				
Action	Label	Name	Overridden	Display
Edit	Agreements Tab	Tab	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	List	List	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	<u>View</u>	View	<input type="checkbox"/>	<u>EchosignAgreement</u> (Visualforce Page)
Edit	Edit	Edit	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	<u>Delete</u>	Delete	<input type="checkbox"/>	<u>Delete Agreement</u> (Visualforce Page)
Edit	Clone	Clone	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	New	New	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	Accept	Accept	<input type="checkbox"/>	Standard Salesforce.com Page

CUSTOMIZING THE 'ECHOSIGN AGREEMENT BASIC' PAGE LAYOUT

This section addresses customizing the 'EchoSign Agreement Basic' page. These customizations are not available when using the default 'EchoSign Agreement Advanced' page. See [Select EchoSign Agreements Page Style](#) for more.

CUSTOM ADDRESS FIELDS

Add fields like 'Customer', 'Sales Operations', 'Accounting', etc. to the EchoSign Agreement Object and use them to specify signers instead of the standard 'Recipient' and 'Additional Recipients' fields.

Agreement Detail		Edit	Delete
Customer	john doe	Owner	Eran Aloni [Change]
Accounting	accounting@myCompany.com	Opportunity	
Email a Copy to		Contract	
Agreement Name	Sales Contract	Remind Recipient to Sign	Never
Message	Please sign the attached document.		
Created By	Eran Aloni, 7/31/2009 12:01 PM	Last Modified By	Eran Aloni, 7/31/2009 12:01 PM
▼ EchoSign Options			
Signature Type	e-Signature	Password required to sign	<input type="checkbox"/>
I also need to sign this document	<input type="checkbox"/>	Password required to view PDF	<input type="checkbox"/>
Signature Order		Password	
Status	Send for Signature		
▼ View Agreement			

Once you add the required custom fields to your EchoSign Agreement page layout, update the 'Override Recipient Field List' Setting with the list of those fields' API names.

To get a field's API name, go to Setup / Create / Objects and click on the 'Agreement' object. Then find the field you'd like to use in the 'Custom Fields and Relationship' list. The Field's API name can be found in the 'API Name' column on the list.

Edit Del	<u>Custom Address</u>	<u>Custom_Address__c</u>
------------	-----------------------	--------------------------

See [EchoSign for Salesforce Custom Settings](#) for instructions on how to update the 'Override Recipient Field List' settings.

SEND USING THE 'ECHOSIGN AGREEMENT BASIC' PAGE

Create a new agreement by clicking 'New' on the Agreements tab or on the Agreements related list in one of the relevant related objects (Contact, Opportunity, Lead, etc.)

1. Specify the recipients
2. Name the agreement, type a message
3. Select signature type, language and other relevant sending options
4. Click the 'Save' button

Agreement Edit
Save Save & New Cancel

Information

1 Recipient (Contact)

Additional Recipients (Email)

Email a Copy to

2 Agreement Name

Account

Data Mapping Result --None--

Data Mapping

Password

External Signers Verification Method --None--

Internal Signers Verification Method --None--

Message

Please review and sign this document.

Owner Amy Admin Wang

Opportunity

Contract

EchoSign Options

3 Signature Type e-Signature

I also need to sign this document

Signature Order --None--

Preview or Position Signature Fields

Password required to sign

Password required to view PDF

Remind recipient to sign Never

Expire document in X days

Language English (United States)

4 Save Save & New Cancel

- On the next screen, attach files from your computer or from the Salesforce Library or Salesforce Content.

Attachments

Action	Title	Last Modified Date	Created By
<div style="display: flex; align-items: center; justify-content: center; gap: 10px;"> Upload File OR Select from: Salesforce Documents Salesforce Content </div>			

- Click the 'Send for Signature' button

EchoSign Actions

[EchoSign Help and Support ?](#)

Send for Signature

Save Agreement

SWITCHING BACK TO THE 'ECHOSIGN AGREEMENT ADVANCED' PAGE LAYOUT

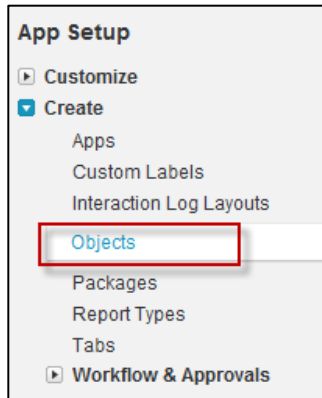
SETTING THE 'ECHOSIGN AGREEMENT ADVANCED' PAGE STYLE

If you choose to switch to the default 'EchoSign Agreement Advanced' page, follow the instructions below to ensure that your Salesforce.com page layouts are properly configured

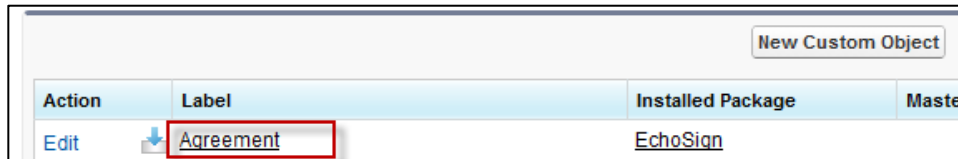


Note: This section only applies to customers with Salesforce.com Enterprise and Unlimited editions.

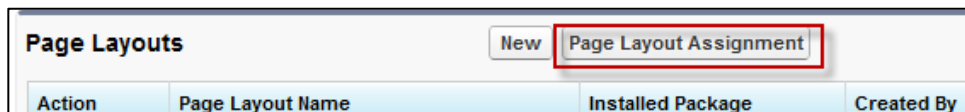
- Go to Setup / Create / Objects



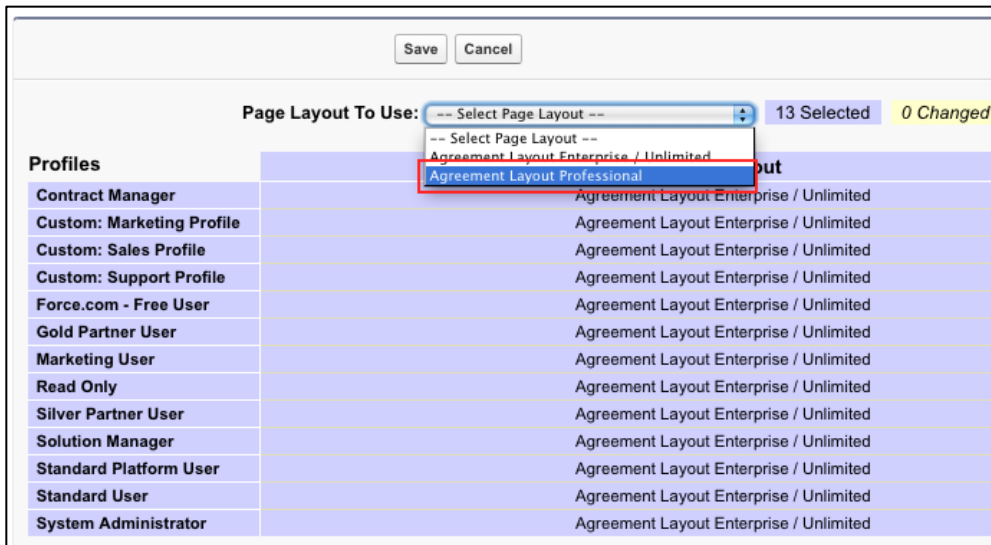
- Click on 'Agreement'



- Click 'Page Layouts' and then 'Page Layout Assignment'



- Click 'Edit Assignment', select all the profiles, select 'Agreement Layout Professional' from the drop down list and click 'Save'



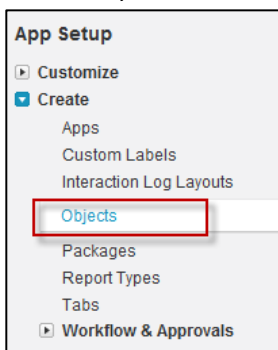
SETTING UP THE AGREEMENT BUTTONS FOR THE 'ECHOSIGN AGREEMENT ADVANCED' PAGE STYLE

If you are switching back to the Advanced page layout, then follow these instructions for setting up the Agreement buttons:

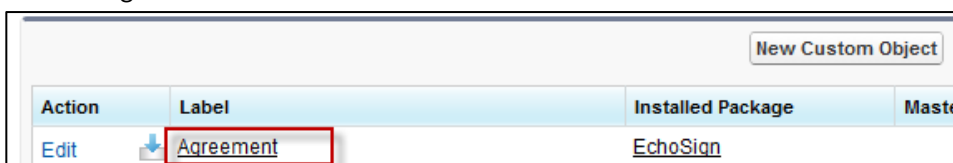
For the layout to take in effect, you also need to update the buttons on the layout.

Follow the instructions below to ensure your Salesforce.com pages are set up properly for the agreement related buttons:

- Go to Setup / Create / Objects



- Click on 'Agreement'



- Click 'Standard Buttons and Links'
- Click 'Edit' next to the Button label 'New' and set it to 'No Override (use default)'
- Click 'Edit' next to the Button label 'Edit' and set it to 'No Override (use default)'



- Click 'Edit' next to the Button label 'View' and set it to 'No Override (use default)'
- At the end of the process, you should have the following setup:

Standard Buttons and Links				
Action	Label	Name	Overridden	Display
Edit	Agreements Tab	Tab	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	List	List	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	<u>View</u>	View	<input type="checkbox"/>	<u>EchoSign Agreement Advanced</u> (Visualforce Page)
Edit	<u>Edit</u>	Edit	<input type="checkbox"/>	<u>EchoSign Agreement Advanced</u> (Visualforce Page)
Edit	<u>Delete</u>	Delete	<input type="checkbox"/>	<u>Delete Agreement</u> (Visualforce Page)
Edit	Clone	Clone	<input type="checkbox"/>	Standard Salesforce.com Page
Edit	<u>New</u>	New	<input type="checkbox"/>	<u>EchoSign Agreement Advanced</u> (Visualforce Page)
Edit	Accept	Accept	<input type="checkbox"/>	Standard Salesforce.com Page