



Adobe® EchoSign®

The #1 rated eSignature application.



ADOBE ECHOSIGN FOR SALESFORCE

QUICK START GUIDE



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Adobe® EchoSign for Salesforce Quick Start Guide

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START SENDING AGREEMENTS FROM ECHOSIGN FROM SALESFORCE IN 15 MINUTES

1. [Install Adobe EchoSign from AppExchange](#)

- a. **Note:** Make sure to select "Grant access to all users" during installation

- 2. Once installed, go to EchoSign Admin tab and go through the setup wizard. It should launch automatically or you can click the Account Setup tab. Make sure you complete all 3 steps in the setup wizard.

3. **SIMPLE AS THAT! Within minutes, you are now set up to send Agreements from the Agreements tab.**




SIMPLE STEPS

SEND FROM OPPORTUNITY PLUS MERGE & MAP DATA TO AND FROM SALESFORCE

1. You can also easily set up a simple test using a sample document with text tags to merge data from an Opportunity and push back data from Signers. Follow these steps:
2. Use [this sample document](#) which has these 2 EchoSign text tag fields:
 - a. `{{*mergeOppNameFromSalesForce}}` - this is the EchoSign field where the existing Opportunity name with merge into
 - b. `{{*updateOppNameInSalesForce}}` - this is the EchoSign field which the signer will update with the new Opportunity name
 - c. You can add this sample document to Salesforce Files, Documents, or Libraries. Or just save it on your computer.
3. Go to the **EchoSign Merge Mappings** tab and click the New button
 - a. Enter name of mapping and select the "Default Merge Mapping" check box
 - b. Click on "Add Field Mapping" link
 - c. Specify the Target EchoSign Document Field = mergeOppNameFromSalesForce
 - d. Select the Source Value = Opportunity -> Name



e. The merge mapping row should look like this:

Map Salesforce Object Fields to EchoSign Document Fields		
Target EchoSign Document Field	Source Type	Source Value
 mergeOppNameFromSalesForce	Salesforce Object Field	Edit : Opportunity : Name

- f. Save the Merge Mapping
4. Go to the **EchoSign Data Mappings** tab and click the New button
 - a. Enter a name of a mapping and select the "Default Merge Mapping" check box
 - b. Click on "Add Mapping" link
 - c. Click on the "Select Object" link and select the "Opportunity" object
 - d. Which Salesforce field to update? -> Select "Name (String)"
 - e. What is the Value of the Data? -> updateOppNameInSalesForce
 - f. The data mapping row should look like this:

1) Which Salesforce Object to Update?	Which Salesforce Field to Update?	2) Where is the Data Coming From? - Select Type	What is the Value of the Data?
Opportunity	Name (String)	EchoSign Form Field	 updateOppNameInSalesForc

- g. Save the Data Mapping
5. **Sending an Agreement from Opportunity.**
 - a. Edit Opportunity page layout and drag the Agreement related list to the layout.
 - b. Go to an Opportunity and under the Agreement related list, click "New Agreement"
 - c. On the Agreement record, enter an email address of the recipient or select a Contact.
 - d. Enter an Agreement Name
 - e. Upload a file from your desktop or select from your Salesforce Documents, Content, or Files.
 - f. Click the "Send for Signature" button and get the agreement signed.
 6. During signing, you should see that the Opportunity name merged into the document automatically.
 7. Once the agreement is signed, the newly entered Opportunity name will be updated backed into Salesforce.

Additional Comments:

1. If you have a custom field on an Opportunity, you can use that instead to test data mappings rather than updating the Opportunity name as the example above demonstrates. Note: Data entered in fields on an EchoSign agreement need to match the field type in Salesforce so to make sure that data is pushed back into Salesforce successfully, start by pushing data into a text field that does not have any field validations in Salesforce.
2. You can also use Agreement Templates to auto-populate default mappings, documents, recipients and other Agreement settings. With this, you can easily set up customized, automated agreement workflows with a single click of a "Send to EchoSign" button on an object.
3. You can send from any object in Salesforce. Additionally, you can set up Chatter updates and Send from a Chatter feed.
4. Reference the full customization guide for more details: http://www.adobe.com/go/echosign_salesforce_installguide