DocuSign for Salesforce Administrator Guide

v6.1.1 Rev A — Published: July 16, 2015

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Documentation Changes

This topic details the documentation updates that have been made for each release of this documentation.

Contact DocuSign Documentation

If you have any comments or feedback on this guide, please email documentation@docusign.com. We welcome your questions and feedback.

v6.1.1 Rev A—July 16, 2015

- Overview - Enhanced the "Releases" section with additional info on Early Access list and how to postpone a push upgrade.

v6.1.1—July 14, 2015

- Display Language Support - DfS is now localized and supports 13 display languages for DocuSign for Salesforce views, pages, and out-of-the-box elements such as the Send With DocuSign buttons.
- Change Chatter Settings - DfS provides predefined Chatter event notifications in 11 languages.

v6.0.10 Rev A—May 15, 2015

- Minor update to remove the term "console", which refers to the DocuSign web application.

v6.0.10—April 10, 2015

- Configure DocuSign for Salesforce - added reference to alternate configuration procedure for Salesforce orgs that do not support the Metadata API.
- Configure for Organizations Without the Metadata API - added this alternate configuration procedure for Salesforce orgs that do not support the Metadata API.

v6.0.1—April 3, 2015

- **Major update for new user interface** - This guide has been extensively revised to reflect the new user interface introduced with v6.0. With v6.0, installation and configuration has been streamlined and simplified. The DocuSign Admin tab is completely redesigned, making it easier to manage DocuSign for Salesforce. Key topics updated:
  - Configure DocuSign for Salesforce
  - Configure DocuSign Actions

- Managing DocuSign Account Settings
- Managing DocuSign Settings (all topics in this section)

v5.6—January 5, 2015

- **Add Users** - added an explanation for possible values for the DSProSFMembershipStatus field.
- **DocuSign for Salesforce1** - revised the section to add sub-topic for the new Beta feature release of the DocuSign mobile app integration.
- **Enable DocuSign Mobile App Tagging** - new topic describing the Beta release of this new feature and how to enable it for Salesforce1 users.

v5.3—June 25, 2014

- **Installing DocuSign for Salesforce** - added clarifying sub-topic on installing DfS for a sandbox environment and how to get a DocuSign Dev Account; provided explanations for security level choices.
- **Configuring DocuSign for Salesforce** - added explanation regarding account credentials are used for configuring DfS, but the Send on Behalf of feature enables users to send envelopes under their own user id; added new completed status image for an added IP range; clarified that Salesforce user must be an administrator.
- **Changing Send Settings** - added detail for the new Enable Reminder and Expiration Settings control; clarified meaning of hiding Send Now and Tag buttons.
- **In Person Signing Custom Buttons** - added topic describing how to make a custom button to initiate an in person signing session. Includes sample code.
- **Sign Now Custom Buttons** - added topic describing how to make a custom button to enable the current user to start a signing session to sign a document. Includes sample code.
- **Custom Email Message** - added 2000 character limitation information to this optional parameter for custom buttons.
- **Changing DocuSign Connect for Salesforce Settings** - updated details about Require Acknowledgment setting; added note explaining what happens if multiple events for a single object are queued.
- **Envelope and Recipient Events Reference** - new topic describing the available event settings for DocuSign Connect.

v5.2—March 19, 2014

- **Overview** - added sub-topic "Releases", covering enforced upgrades and adding information around the requirement to upgrade to the latest release in order for this documentation to apply.
- **Sample Button Scripts for Opportunity Object** - updated sample code for "Send from DocuSign with just Quotes".
- **Changing Send Settings** - added note to explain that envelope custom fields are not available for envelopes sent through Salesforce.

v5.1—February 7, 2014

- **Configuring DocuSign for Salesforce** — updated the Trusted Network step to describe the new automated process to configure Salesforce Network Access for all four DocuSign data center IP ranges.

v5.0—January 15, 2014

- **Adding DocuSign Actions for Salesforce1 Mobile App Users** — added topic describing the new support for Salesforce1 mobile app users. This topic describes how to configure your Salesforce environment to add DocuSign actions.
- **Adding Trusted IP Ranges for DocuSign** — added topic covering how to update the Salesforce Network Access list of Trusted IP Ranges to enable your environment to work with the new IP ranges being implemented by DocuSign. This procedure is only necessary for installations upgrading from previous DocuSign for Salesforce versions. New installations set the appropriate IP ranges during the configuration process.
- **Configuring DocuSign for Salesforce** — updated the list of Trusted IP Ranges to reflect the expanded server coverage coming to all DocuSign users.
- **Automatic Anchor Text and Tags** — added concept information about standard anchor text and using custom tags to extend the out-of-the-box functionality.

v4.1.8—September 11, 2013

- **Adding Send with DocuSign Button to the Quotes Object** — added topic describing the new support for the native Salesforce Quotes object. This topic describes how to add and configure a Send with DocuSign button to a Quote or Opportunity object.

v4.0—July 5, 2013

- Added information about the Allow Sender to Edit check box for merge fields.
- Updated procedures for accessing the DocuSign Connect and images associated with the procedure.

Table of Contents

DocuSign for Salesforce Overview

The DocuSign® for Salesforce managed package allows users to send a document for signatures from within Salesforce and guide signers in the signing process. If you are using the Salesforce Professional, Enterprise or Unlimited Editions, DocuSign for Salesforce easily integrates into your Salesforce account. DocuSign for Salesforce is available from the AppExchange™.

DocuSign for Salesforce keeps track of the progress of deals from within Salesforce and uses your Salesforce tabs (Accounts, Contacts, Opportunities, Contracts, Cases or any other standard or custom tab in Salesforce) to address your documents.

DocuSign for Salesforce also supports the new Salesforce1 mobile app experience, and allows you to configure a DocuSign action for standard Salesforce objects.

Releases

Starting with the DocuSign for Salesforce 4.0.x release, DocuSign enforces major releases, as well as patches. This is an important step to make sure all DocuSign for Salesforce customers are using the latest, most up-to-date package. Product documentation, including these release notes and other administrator and user guides, is valid for installations that upgrade to the stated version.

For all v4.0.x and later customers, upgrades begin no sooner than 30 days after a new major release is listed to the AppExchange. Patches are pushed to customers immediately. Salesforce has a strict code change limit for patches, making them safe and reliable.

Any customer using a version of DocuSign for Salesforce older than v4.0.x (v3.11.5 and below) will not be upgraded automatically.

Refer to the Documentation Changes topic for a list of the major changes and feature introductions since the v4.0 release.

To receive Early Access notifications

For major releases, customers can opt into our Early Access list and receive pre-release versions two weeks before they are listed in the AppExchange. To opt in, send an email request to dfs@docusign.com with the names and emails to receive Early Access notifications.

To postpone a major release push upgrade

Customers can postpone a major release push upgrade for 30 days. To request a delay and receive a 30-day extension, notify DocuSign by email at dfs@docusign.com within the original 30 day upgrade window. The notification must include the Salesforce.com Organization ID, the reason for requesting the delay, and confirmation that the reason for the delay will be resolved within the extension period. Notification is required for each major release and can be requested only once per release.

Display Language Support

DocuSign for Salesforce provides localized support in several languages for both Salesforce and Salesforce1. DocuSign for Salesforce supports 13 display languages for DocuSign for Salesforce views, pages, and out-of-the-box elements such as the Send With DocuSign buttons.

> **Note**: To ensure all translated content is available for your DocuSign for Salesforce users, DocuSign recommends that the Salesforce administrator selects the languages to activate for translation in the Salesforce Translation Settings. Once you enable the Translation Workbench at **Setup > Administration Setup > Translation Workbench**, select **Translation Settings** and activate each language you want to support.

If users select one of the supported languages for their Salesforce Language setting, then the DocuSign for Salesforce views, pages, and out-of-the-box elements such as the Send With DocuSign buttons, all display in the matching language. If a non-supported language is selected, DocuSign for Salesforce displays in English.

DocuSign for Salesforce supports the following display languages:

- English
- Chinese (Simplified)
- Chinese (Traditional)
- Dutch
- French
- German
- Italian
- Japanese
- Korean
- Portuguese
- Portuguese (Brazil)
- Russian
- Spanish

> **Note**: The tagging view, where you add fields for your recipients to complete, is not translated, and remains an English only view. Likewise, the signing language for recipients is not affected by the display language setting.
>
> The tagging view language is set by either your browser's language preference, or your

DocuSign display language selection, set from the language menu in the footer of the application.

Installing and Configuring DocuSign for Salesforce

This section covers how to install the DocuSign for Salesforce managed package and complete the initial account configuration.

- Install DocuSign for Salesforce
- Configure DocuSign for Salesforce
- Add Trusted IP Ranges

Install DocuSign for Salesforce

Use this procedure to install and deploy DocuSign® for Salesforce. If you have questions about downloading AppExchange applications, see the salesforce.com documentation for assistance.

Using a Salesforce Sandbox Environment

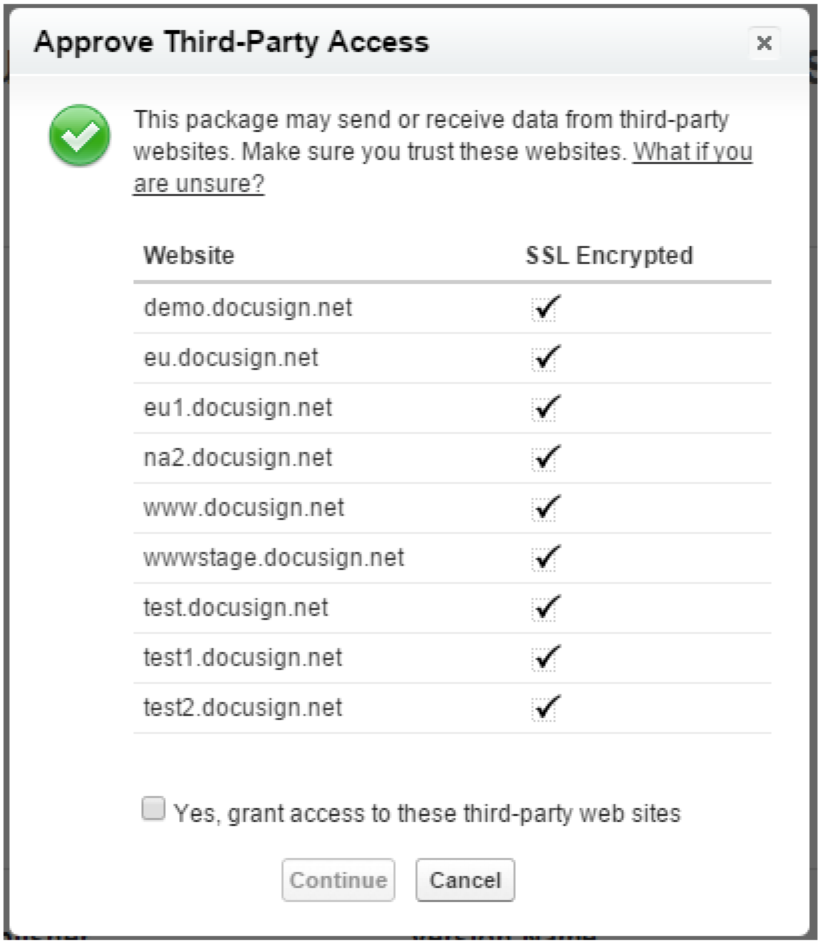
Most developers choose to begin their experience with DocuSign for Salesforce using a Salesforce sandbox environment. You can use one DocuSign account with only one Salesforce environment. So to install DocuSign for Salesforce in a sandbox environment, first get a DocuSign Developer Account. This is a free account, which you can sign up for at the DocuSign Developer Center.

To install DocuSign for Salesforce

1. Get the DocuSign for Salesforce App. Find the DocuSign for Salesforce package in the AppExchange and click **Get It Now**. This takes you to the Confirm Installation page.

Note: You might be asked to log into your Salesforce account.

2. Review the instructions, type your Salesforce credentials for the location where you are installing DocuSign for Salesforce, read and agree to the terms & conditions and then click **Install**. You are taken to the Package Installer page.
3. Review Package Installation Details. From the Package Installer page, click the **View Components** to see the components installed with DocuSign for Salesforce. Click **Install** to continue with the installation.
4. Approve the third-party access information. This shows a list of websites that the package might send data to or receive data from during operations.

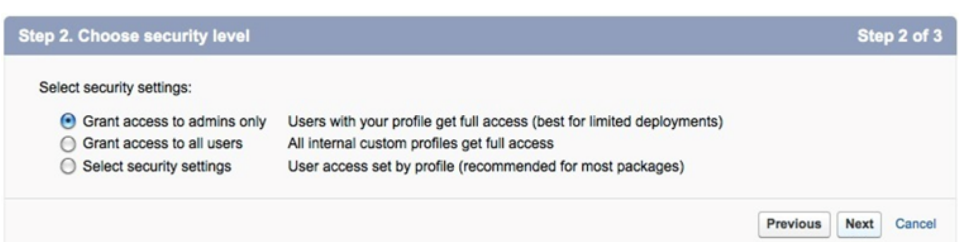


a. Select **Yes, grant access to these third-party web sites**

b. Click **Continue**.

5. Approve Package API Access. Review the information on the page and click **Next** to continue.

6. Choose the security level. The security level determines user access to DocuSign for Salesforce. DocuSign recommends you select **Grant access to all users**, then click **Next** to continue.

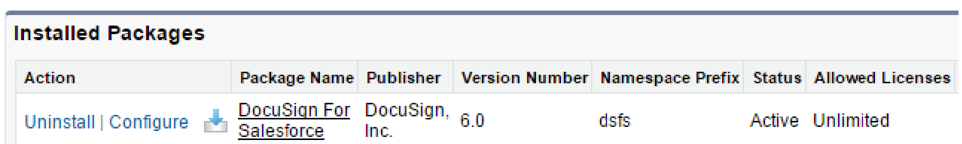


- **Grant access to admins only**. This option requires you to enable the viewing of the DS Visualforce pages in Salesforce for System Administrator user profiles.
- **Grant access to all users**. This is the recommended security level. You can change user access later through the DocuSign Admin tab.
- **Select security settings**. If you have clear user profiles and want to selectively grant access by profile, choose this option.

7. You are now ready to install DocuSign for Salesforce to your Salesforce org. Click **Install** to continue.

The installation process begins and can take up to 15 minutes. You will be notified by email when it is completed.

8. After installation, on the list of Salesforce Installed Packages, you can see the DocuSign for Salesforce package:



Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses
Uninstall | Configure	DocuSign For Salesforce	DocuSign, Inc.	6.0	dsfs	Active	Unlimited

When the installation DocuSign for Salesforce is completed, you are ready to configure DocuSign for Salesforce.

Configure DocuSign for Salesforce

Use this procedure to configure DocuSign for Salesforce. Configuring is about connecting DfS to a DocuSign account and adding DocuSign features to Salesforce layouts. You must configure DfS before users can send documents or manage accounts.

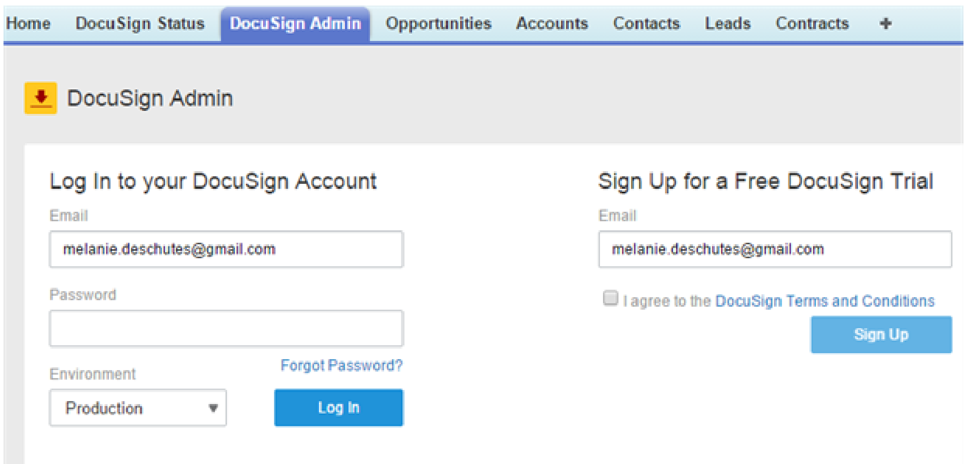
The account credentials you provide during configuration enable DfS for your Salesforce organization. But when authorized users send envelopes through DocuSign, their own user id is included, so transactions go to the specific sender's account. The Send on Behalf of feature enables this process.

Configuration is a two-step process, with an optional third step. The basic steps are:

1. Sign in or create a DocuSign account, and connect Salesforce to DocuSign.
2. (Optional) Add DocuSign sending features to your Salesforce layouts.

To connect your DocuSign account to your Salesforce account

1. After installing the DocuSign for Salesforce managed package, select the **DocuSign Admin** tab in Salesforce to bring up the DocuSign Log In view:



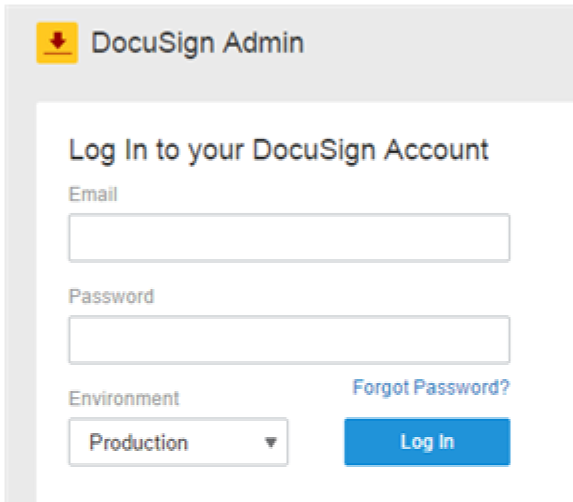
2. Complete the appropriate log in or sign up section for your situation:
   - **Log in to your DocuSign Account:** Use an existing DocuSign admin account.
     - Enter your DocuSign email and password information.
     - Select the Environment associated with your DocuSign account.
     - If you have multiple accounts, select the account to associate with Salesforce, and click **Log In** to continue.
     - Go to step 3.
   - **Sign up for a Free DocuSign Trial:** This creates a new account with a complementary 30-day free trial.
     a. Enter your email address, agree to the DocuSign Terms and Conditions and click **Create Account**.
     b. Enter your information to create the new account and click **Next**.

     > **Note:** The free trial account is automatically directed to the DocuSign Production environment.

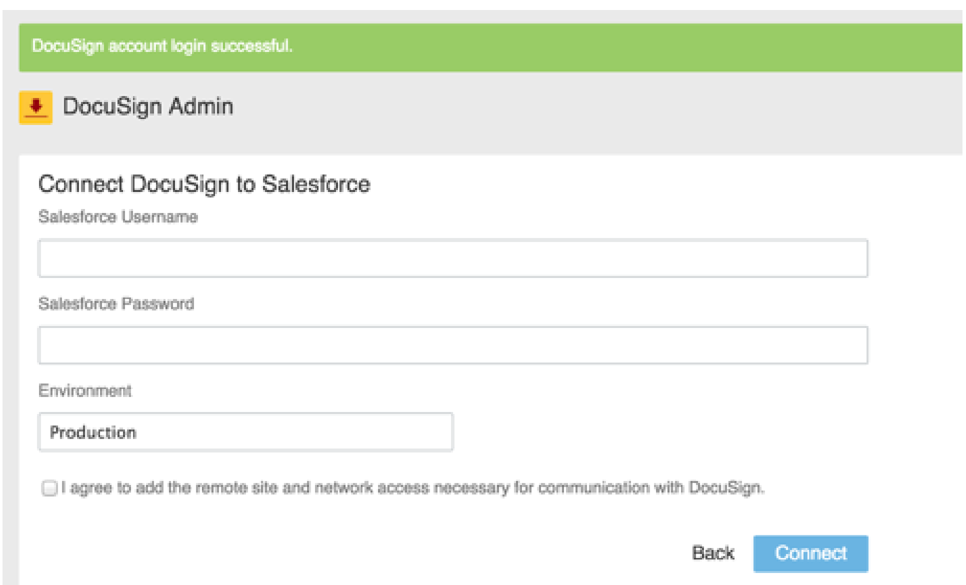
     c. Go to your email account which you used to create the free trial to find an email with an activation link.

d. Follow the activation instructions to activate your trial account and create a password.

e. Return to DocuSign for Salesforce and enter your new DocuSign login email and password and click **Log In**.



3. Connect your DocuSign account with your Salesforce account, adding DocuSign as a Trusted Network in Salesforce. Enter your Salesforce credentials, select the appropriate environment for your Salesforce organization, and select the **I agree to add….** check box.



a. Enter your Salesforce credentials and select the appropriate environment.

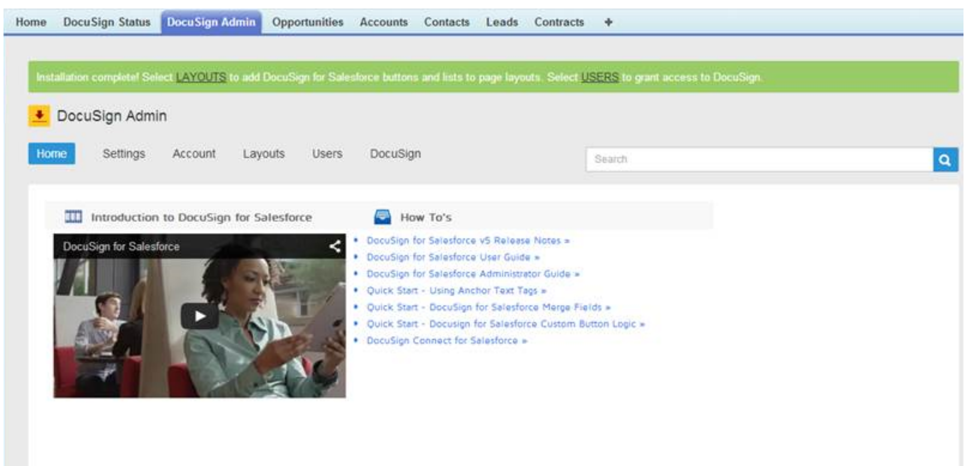
> **IMPORTANT**: This Salesforce user must be a Salesforce administrator.

b. Select the **I agree to add...** check box to add DocuSign as a Trusted Network to your Salesforce organization.

c. Click **Connect**.

> **IMPORTANT**: If you get an error message with instructions to add DocuSign to the Salesforce trusted network list, stop here and continue with the alternate configuration procedures in Configure for Organizations Without the Metadata API.

d. When the DocuSign Admin Home view appears, you have successfully connected your DocuSign and Salesforce accounts.



The following IP ranges are listed in Salesforce Network Access as Trusted IP Ranges:

209.67.98.1 through **209.67.98.63**

206.25.247.129 through **206.25.247.159**

209.46.117.161 through **209.46.117.191**

162.248.184.1 through **162.248.187.255**

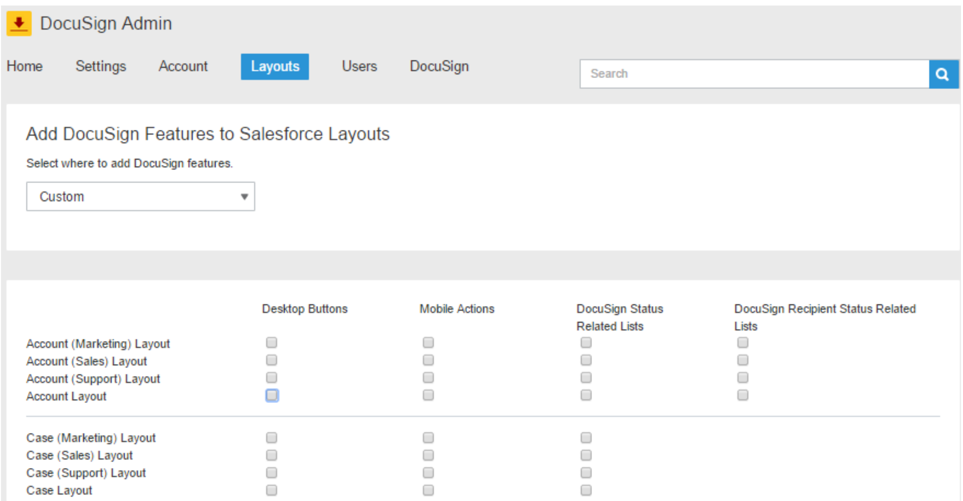
185.81.100.1 through **185.81.103.254**

> **Note:** If any of these ranges are missing, you can use the procedure in Add Trusted IP Ranges for DocuSign to add them.

Add DocuSign features to Salesforce layouts

To enable Salesforce users to send documents to be signed from records in standard Salesforce objects, you add DocuSign features to Salesforce page layouts. For the out-of-the-box sending and status features, you can quickly and easily add items to any standard layout in Salesforce Account, Opportunity, Contact, Case, or Lead objects:

- **Desktop Buttons** refer to the Send with DocuSign button for the full Salesforce application.
- **Mobile Actions** refer to the DocuSign action for Salesforce1 mobile app users.
- **Related Lists** refer to status lists for sent documents and recipients.



To add features to layouts

1. From the DocuSign Admin tab, select the **Layouts** pane.
2. To quickly add DocuSign features to a pre-defined set, choose a value from the drop-down list (All, Desktop Buttons, Mobile Actions).
3. To create a custom set of features, select **Custom**, and then check the options you wish to add.
4. Click Save.

   The features you selected are applied and available on the Salesforce layouts.

> **Note:** Refer to Add Send with DocuSign Buttons and Add DocuSign Actions for Salesforce1 Mobile App Users for more information about adding DocuSign buttons and status information, and DocuSign actions.

You are ready to manage your account and send documents. To activate other users and allow them to use DocuSign in your Salesforce environment, see Add Users.

Configure for Organizations Without the Metadata API

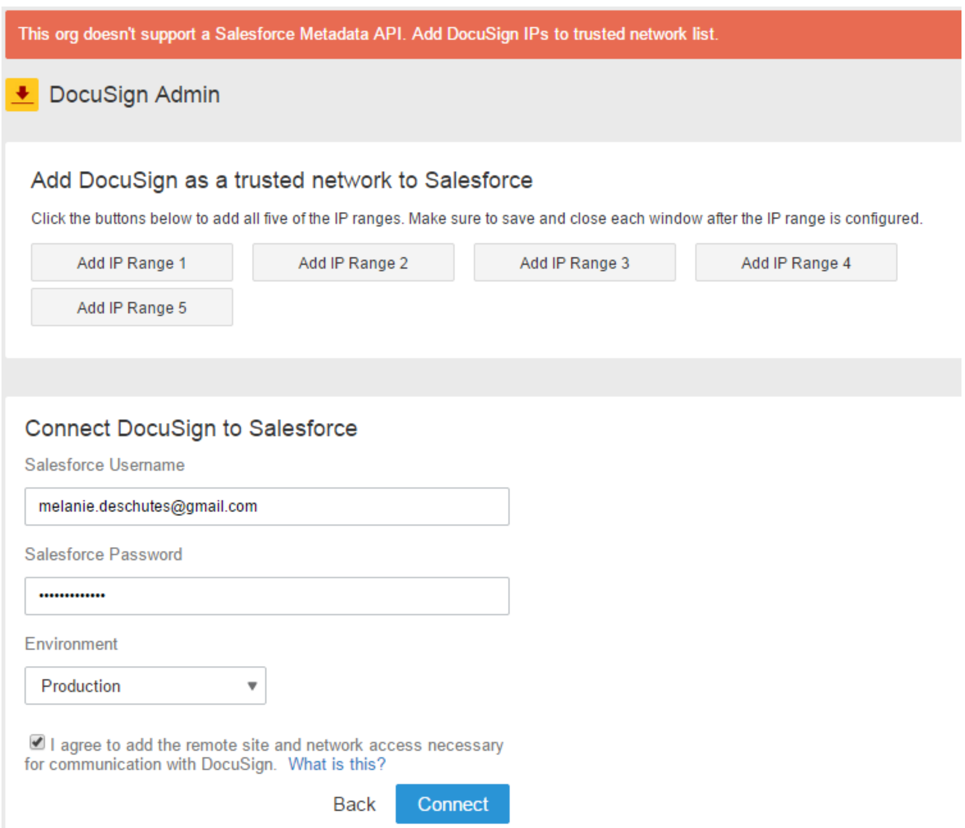
This procedure is for Salesforce organizations which do not support the Salesforce Metadata API. This API is required for the configuration enhancements delivered in v6.0.1.

If you are unable to complete the Connect your DocuSign account to Salesforce configuration steps presented in Configure DocuSign for Salesforce, use the procedures in this topic to finish configuring the DocuSign managed package.

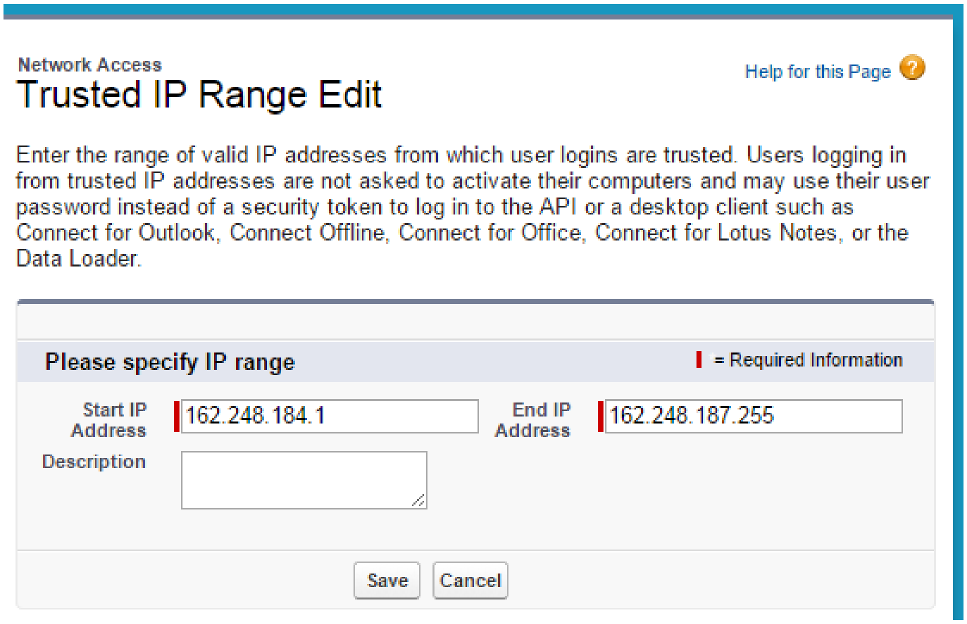
To complete configuration for organizations which do not support the Salesforce Metadata API

1. Complete Steps 1 - 3c in Configure DocuSign for Salesforce.

   The error message at the Connect DocuSign to Salesforce and add trusted network step appears:



2. Add the DocuSign IP ranges as trusted ranges in Salesforce:
   a. Click **Add IP Range 1**. The Trusted IP Range Edit window opens listing the IP range:

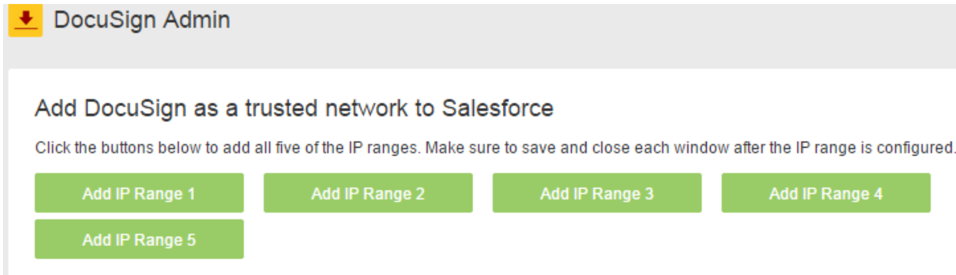


   b. Click **Save**, and close the window.

   In the DocuSign Admin tab, the first range turns green, indicating it is now added in Salesforce:

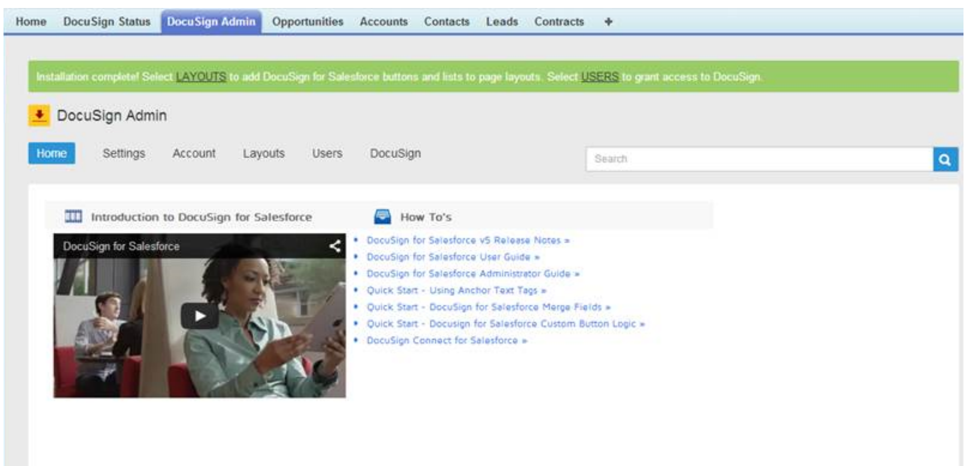
Note: Make sure to close the Trusted IP Range Edit window after each addition.

c. Repeat Steps 2a - 2b for the remaining four IP ranges, until all ranges are green:



d. Enter your Salesforce administrator credentials, select the **I agree…** check box, and click **Connect**.

When the DocuSign Admin Home view appears, you have successfully connected your DocuSign and Salesforce accounts.



e. The following IP ranges are listed in Salesforce Network Access as Trusted IP Ranges:

209.67.98.1 through **209.67.98.63**

206.25.247.129 through **206.25.247.159**

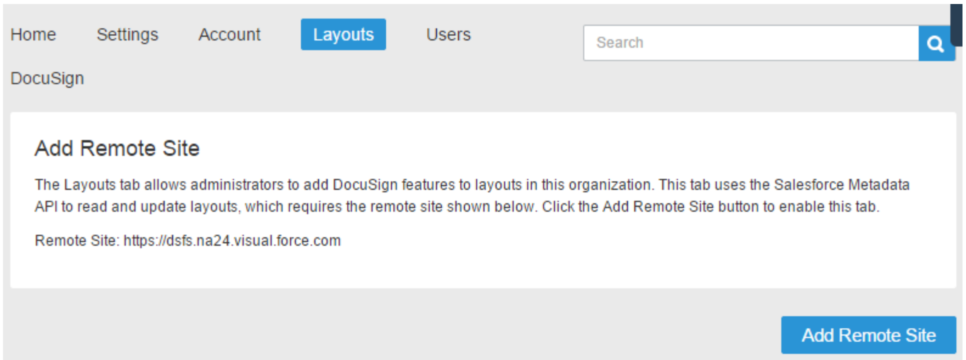
209.46.117.161 through **209.46.117.191**

162.248.184.1 through **162.248.187.255**

185.81.100.1 through **185.81.103.254**

3. Add DocuSign features to Salesforce layouts.

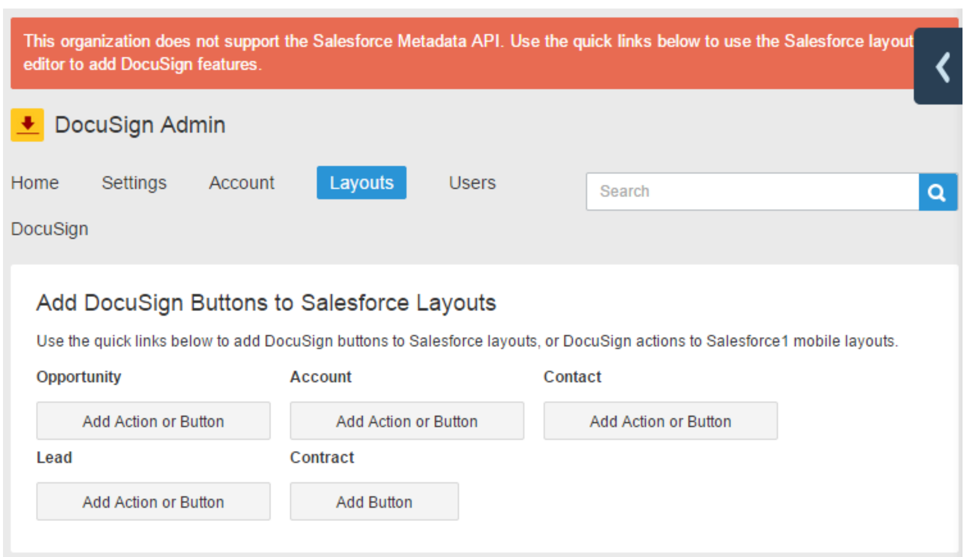
   a. Select the **Layouts** tab. The Add Remote Site message appears.



   b. Click **Add Remote Site**.

   The warning regarding the Salesforce Metadata API is expected.

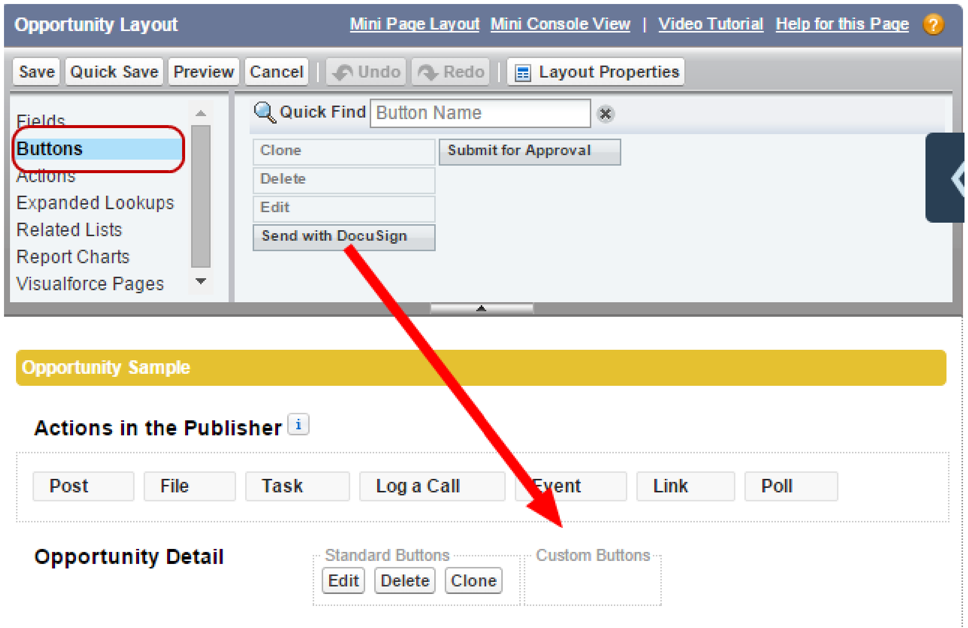
   c. Use the **Add Action or Button** quick links to add DocuSign buttons and actions to Salesforce layouts.



   d. Click any of the object quick links. The selected page layout appears in edit mode, with the palette at the top of the view.

   e. In the palette, click one of the following:

      - **Buttons** to show the available buttons
      - **Related Lists** to show available lists
      - **Actions** to show the available Salesforce1 actions



f. From the palette, depending on which feature you are adding, drag one of the following:
   - **Send with DocuSign** button to the Custom Buttons box
     - To remove the button, drag it back to the palette
   - **DocuSign Status** related list onto the layout
     - To remove the list, click the remove related list icon at the top of the list
   - **DocuSign** action to the Actions in the Publisher section
     - To remove the action, drag it back to the palette

g. In the palette, click **Save** to save your edits to the page.

   Salesforce updates the layout with your changes.

4. Repeat Step 3 to add additional DocuSign features to layouts for the standard Salesforce objects.

> **Note:** Refer to Add Send with DocuSign Buttons and Add DocuSign Actions for Salesforce1 Mobile App Users for more information about adding DocuSign buttons and status information, and DocuSign actions.

You are ready to manage your account and send documents. To activate other users and allow them to use DocuSign in your Salesforce environment, see Add Users.

Add Trusted IP Ranges for DocuSign

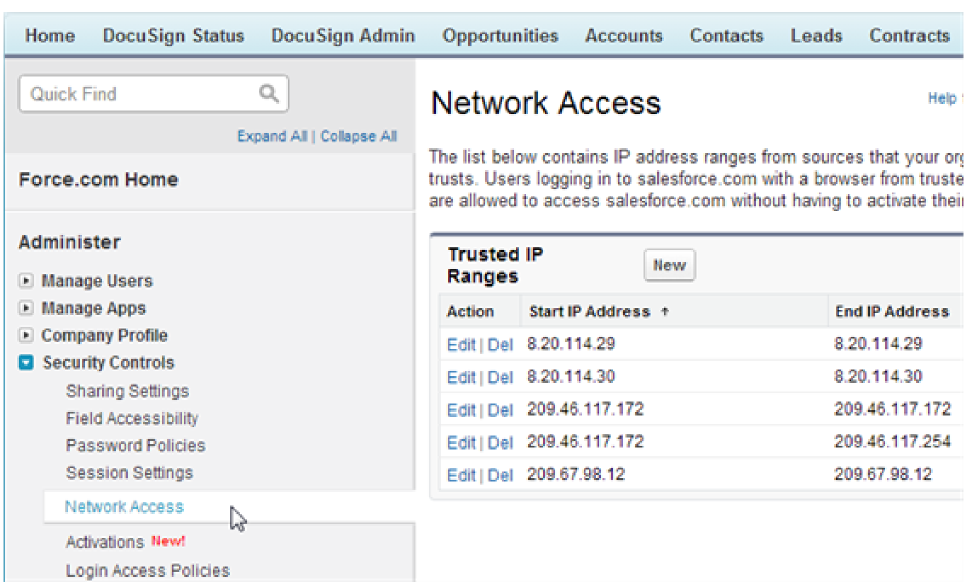
NOTE: This procedure is for DocuSign for Salesforce customers who upgrade to v6 (rather than new installations). New installations set the appropriate set of Trusted IP ranges as part of the installation process. With upgrades, the Salesforce administrator should verify that the Network Access information covers the extended IP ranges, and add ranges if necessary.

As a DocuSign customer, you know that we are committed to security and keeping the DocuSign service available at all times. To improve DocuSign service availability, we are increasing server redundancy by directing all of our hosting servers to serve customer requests from all of our data centers. This availability enhancement adds the ability to keep the DocuSign service up and running, even during regular server maintenance windows. Where previously DocuSign was down for maintenance, with these changes, downtime diminishes to near zero.

With this enhancement, existing DocuSign for Salesforce installations will need to update their Salesforce Network Access for the Trusted IP Ranges allowed by your use of DocuSign for Salesforce. You can use the following procedure to prepare your environment to work with the new IP ranges being implemented to support the high availability feature. New installations will be prompted to add these ranges during the setup process.

Follow these steps

1. Log in to Salesforce as a Salesforce Administrator.
2. Click **Setup**.
3. On the left hand side of the screen, click **Security Controls > Network Access**.



4. In the Trusted IP Ranges list, verify that you have the following IP ranges: **209.67.98.1** through **209.67.98.63**

   206.25.247.129 through **206.25.247.159**

   209.46.117.161 through **209.46.117.191**

   162.248.184.1 through **162.248.187.255**

   185.81.100.1 through **185.81.103.254**

   > **Note:** You might have other ranges in your Trusted IP Ranges list. Do not delete any of those, as they may be used by other applications or integrations.

5. If any of the ranges listed in step 4 are missing, continue with this procedure.
6. Click **New**.
7. Enter the IP addresses (**Start IP Address** to **End IP Address**) for any missing range.
8. Click **Save**.
9. Repeat steps 6-8 to ensure you have the following ranges in the Trusted IP Ranges list:

   209.67.98.1 through **209.67.98.63**

   206.25.247.129 through **206.25.247.159**

   209.46.117.161 through **209.46.117.191**

   162.248.184.1 through **162.248.187.255**

   185.81.100.1 through **185.81.103.254**

Working With Users

This section provides information on adding users or administrators to DocuSign for Salesforce and on removing users from DocuSign for Salesforce.

- Add Users
- Remove Users

Add Users

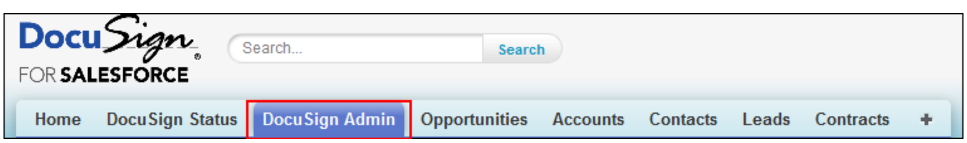
This procedure explains how to add a Salesforce user to the DocuSign account, or add a user and make the user an administrator for the DocuSign account.

Note about Email Activation: DocuSign for Salesforce works with a DocuSign account supporting multiple users. Whether or not each user added to that DocuSign account (through DocuSign for Salesforce or otherwise) gets an activation email is controlled by the DocuSign Distributor associated with the DocuSign account.

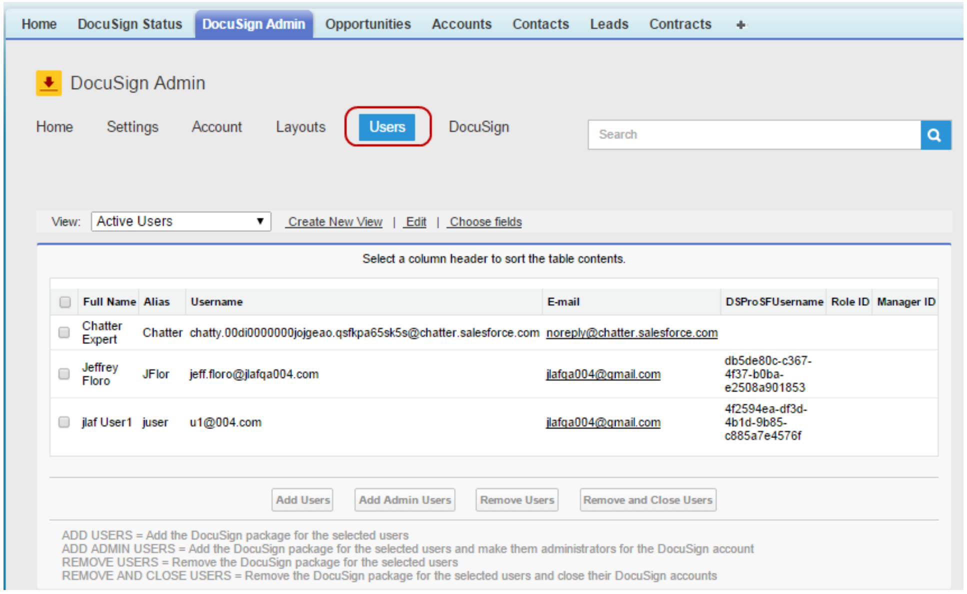
Email activations are not selective, meaning if one user gets an email activation when that user is created, all users will get an activation email when created. If you created your DocuSign account through the Trial available by installing DocuSign for Salesforce from the Salesforce AppExchange, the Plan associated with that Trial specifies that all users will get an email activation upon creation. This is required, because DocuSign must validate the email for the administrator user.

If you do not wish for each user to get an email activation notice, you must contact DocuSign support to have the Plan associated with your DocuSign account changed to one which turns off email activations.

1. From the force.com apps drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.
   The DocuSign Admin Home page appears.



3. Select the **Users** pane.



4. In the Users page, find the user(s) you want to activate. You can use the **View** list and other filters to sort and find users associated with your Salesforce account.
   - The DocuSign Inactive Users view provides a list of active Salesforce users that have not yet been activated in DocuSign.
   - The DocuSign Active Users view provides a list of users that have been activated for DocuSign.
   - Create new views to filter for users based on your own criteria.
   - Choose fields to display in the user list to allow you to search on those criteria from within a view.
   - The field **DSProSFMembershipStatus** is useful for checking a user's status in DocuSign. The possible values for this field and their description are as follows:
     - **(empty)** - a Salesforce user who has not yet been added as a DocuSign user, or has been removed from the DocuSign account
     - **activated** - a Salesforce user who has been added to the DocuSign account, but has not yet used DocuSign for Salesforce to create their first envelope
     - **verified** - an activated DocuSign user who has created their first envelope
5. Select the check box for the user(s) you want to activate. You can select the top-level check box to select all the displayed users.
6. Click **Add Users** or **Add Admin Users** to add the selected users.

- **Add Users** adds the selected users to your DocuSign package.
- **Add Admin Users** adds the selected users to your DocuSign package and makes them administrators for the associated DocuSign account.

> **Note:** A Salesforce user must have ManageUsersPermission to be added as a DocuSign administrator.

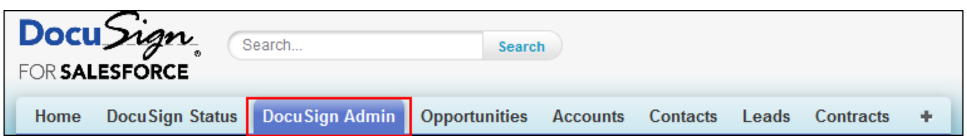
7. The system activates the user and they can send documents from DocuSign for Salesforce. Admin users are able to access the DocuSign Admin tab in Salesforce and the DocuSign web application.

> **Note:** If the user has an existing DocuSign account and DocuSign for Salesforce does not have the correct email-password combination for the user, an activation email is sent to the user.

Remove Users

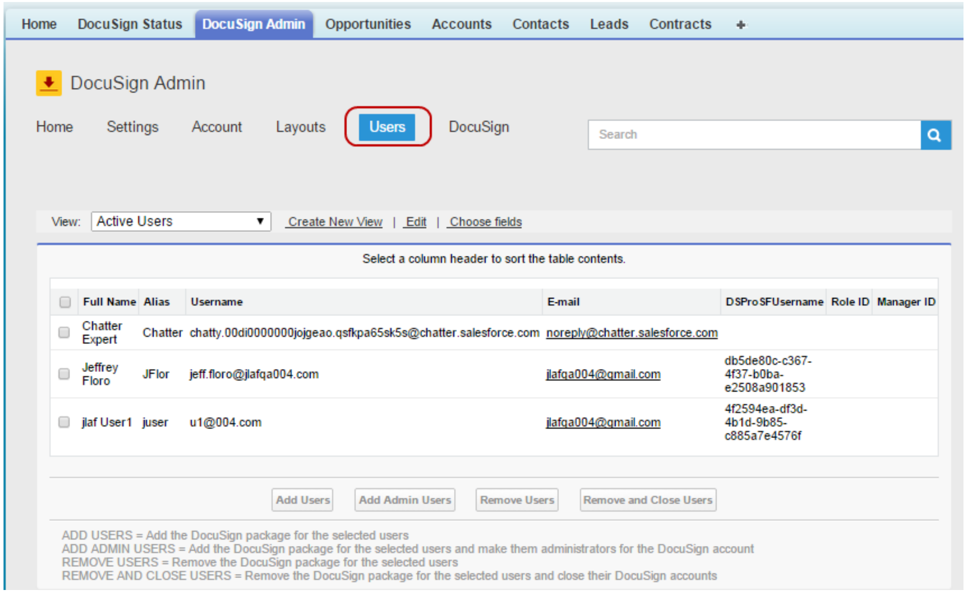
This procedure explains how to remove a user from your DocuSign for Salesforce package, or remove a user and close their DocuSign account.

1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.



   The DocuSign Admin Home page appears.

3. Select the **Users** pane.



4. In the Users page:

   a. Find the user(s) you want to remove. You can use the **View** list and other filters to sort and find users associated with your Salesforce account. The DocuSign Active Users view provides a list of users that have been activated for DocuSign.

   b. Select the check box for the user(s) you want to remove. You can select the top-level check box to select all the displayed users.

   c. Click **Remove Users** or **Remove and Close Users** to remove the selected users.

      - **Remove Users** remove the selected users from your DocuSign package.
      - **Remove and Close Users** removes the selected users from your DocuSign package and closes their DocuSign account.

Adding DocuSign Features to Salesforce Layouts

DocuSign for Salesforce automatically transmits real time data (form data from any document sent in an envelope) and information about DocuSign envelopes directly into your Salesforce account. This data includes status information for a DocuSign transaction, envelope information (such as the subject and envelope fields), recipient name and company.

The section contains the following topics:

- Add Send With DocuSign Buttons to a Salesforce Tab
- Add Send With DocuSign Button to the Quotes Object
- Add Send With DocuSign Buttons to a Salesforce Custom Object
- Add DocuSign Status to a Salesforce Tab
- Add DocuSign Status to a Custom Object
- Add DocuSign Buttons to the DocuSign Status Object

Add the Send with DocuSign Button to a Salesforce Layout

The **Send with DocuSign** button allows Salesforce users to send documents to be signed from records in the Salesforce object. As part of the out-of-the-box DocuSign for Salesforce package, you can easily configure page layouts for the following Salesforce objects with the Send with DocuSign button:

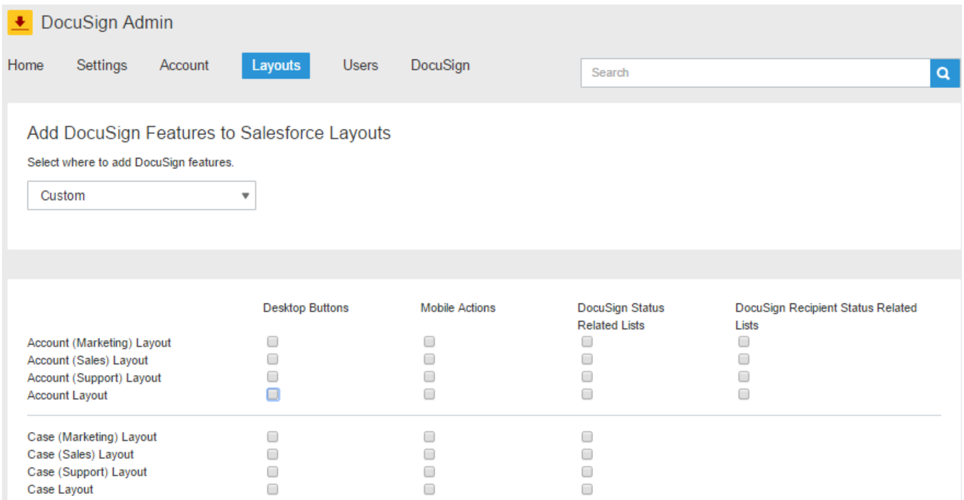
- Accounts
- Contacts
- Opportunities
- Leads
- Contracts
- Cases

This procedure explains only how to add the **Send with DocuSign** button to page layouts for these standard Salesforce objects. If you have questions about customizing Salesforce, see the salesforce.com documentation for assistance.

Note: If your Salesforce organization cannot access the new Layouts pane, use the configuration steps in Configure for Organizations Without the Metadata API.

To add a Send with DocuSign button to a layout

1. From the Force.com App Menu, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab. The DocuSign Admin Home page appears.
3. Select the **Layouts** pane.



4. To quickly add the Send with DocuSign button to all standard object layouts, select **Desktop Buttons** from the drop-down list.
5. To create a custom set of features, select **Custom**, and then check the layouts under the Desktop Buttons column to which you wish to add the button.
6. Click **Save**.

   Salesforce updates the layouts you selected by adding the **Send with DocuSign** button to the **Detail** section.

   Note: Refer to Add DocuSign Actions for Salesforce1 Mobile App Users for more information about adding DocuSign actions for your Salesforce1 users.

Add Send With DocuSign Button to the Quotes Object

Starting with the DocuSign for Salesforce v4.1.8 release, you can add the Send with DocuSign button to the native Salesforce Quotes object without any additional package installations. This enhancement does require a minor configuration change, however. Since Quotes is not a required Salesforce object, the out of the box Send with DocuSign button is not added to the Quote object by default.

Adding a custom button handles this Salesforce restriction and supports sending from the Quotes object.

Note: Before the 4.0.x release of DfS, it was possible to use DocuSign with Quotes using the DocuSign for Real Time Quotes managed package. The DocuSign for Real Time Quotes package was never a supported package, and it only worked with DfS packages 3.11.5 or older.

If your Salesforce implementation includes the Quotes object, you can configure a custom button with a new parameter RQD (Related Quotes Document) and send documents directly from a Quote. You can also create an envelope from an Opportunity, and DocuSign will retrieve documents from the related Quote.

This procedure explains how to create and add the Send with DocuSign button to the Quotes object. In this procedure, the button is scripted for a quote containing a contact and a quote PDF. The script retrieves the contact and the latest quote PDF to send with DocuSign.

You can script the button to perform different actions, from either the Quotes or the Opportunity object. Several examples are provided after the sample procedure to provide you with ideas of how you might use this feature in your Salesforce implementation.

If you have questions about customizing Salesforce, see the salesforce.com web site for assistance.

To create and add the Send with DocuSign button to the Quotes object

1. To enable Quotes in your Salesforce instance:
   a. From Salesforce.com, click **Setup** to go to the Force.com Home page.
   b. In the sidebar, under the Build menu, click **Customize** > **Quotes** > **Settings**.
   c. Select **Enable Quotes** and click **Save**.
   d. On the Page Layout Selection, select **Opportunity Layout** to display the Quotes related list on the standard opportunity page layout. Select additional layouts as desired.
   e. Click **Save**. Quotes is enabled and added to your Opportunity page layout.
2. From Setup, click **Customize** > **Quotes** > **Buttons and Links**. The list of custom links for Quotes appears.
3. Click **New Button or Link**.
4. In the New Button or Link for, enter the following information:
   - **Label**: the button label (ex. Send with DocuSign)
   - **Name**: the unique ID for the button (ex. Send_with_DocuSign)
   - **Display Type**: select **Detail Page Button**
   - **Behavior**: select **Execute JavaScript**

- **Content Source**: verify setting is set to **OnClick JavaScript**. If Content Source does not change, select **OnClick JavaScript**.

5. Enter the button script in the Custom Button editor - this script must be all on one line, with no line breaks:

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}

var sourceId = DSGetPageIDFromHref();
var RQD=DSGetPageIDFromHref();
window.location.href = "/apex/dsfs__DocuSign_CreateEnvelope?DSEID=0
&SourceID="+sourceId+"&RQD="+RQD;
```

6. Click **Save**.
7. Open the instance of the Quote object you want to add the DocuSign button to and select to **Edit Layout**. The page layout appears with the palette at the top of the page layout.
8. In the palette, click **Buttons** to show the available buttons.
9. From the palette, drag the new custom button (ex. **Send with DocuSign**) to the **Custom Buttons** box.
10. In the palette, click **Save** to save your edits to the page.

> **Note:** To remove this button from the page, drag the button from the **Custom Buttons** box back to the palette.

Salesforce updates the layout by adding the **Send with DocuSign** button to the **Detail** section of the page.

Sample Button Scripts for Opportunity Object

In addition to the sample script provided in the procedure above, you can configure your Send with DocuSign button for Quotes in other ways. You can configure the button on either the Quotes or the Opportunity object. The following are some alternate scripting examples for the Opportunity page layout.

Send with DocuSign with just Quotes

Description: With an Opportunity containing Quotes, Contact Roles, Related Content, and Attachments, this script retrieves just Quotes.

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}
var RQD = DSGetPageIDFromHref();
var SourceID = "{!Opportunity.Id}";
```

```
var CRL = "LoadDefaultContacts~0";
var LA = "0";
var RC = "";
window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&RQD="+RQD+"&SourceID="+SourceID+"&CRL="+CRL+"&LA="+L
A+"&RC="+RC;
```

Send with DocuSign with Quotes and RC

Description: With an Opportunity containing Quotes, Contact Roles, Related Content and Attachments, this script retrieves only the Quotes and Related Content.

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}
var RQD = DSGetPageIDFromHref();
var SourceID = "{!Opportunity.Id}";
var CRL = "LoadDefaultContacts~0";
var LA = "0";
var RC = GetRelContentIDs("{!Opportunity.Id}");
window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&RQD="+RQD+"&SourceID="+SourceID+"&CRL="+CRL+"&LA="+L
A+"&RC="+RC;
```

Send with DocuSign with Quotes, RC, Attachments, and CRL

Description: With an Opportunity containing Attachments, Related Content, and Quotes, this script retrieves Attachments, Related Content, and Quotes, and adds the Salesforce User as signer.

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}
var RQD = DSGetPageIDFromHref();
var SourceID = "{!Opportunity.Id}";
var CRL = "Email~{!User.Email};FirstName~{!User.FirstName};LastName~
{!User.LastName},LoadDefaultContacts~0";
var LA = "1";
var RC = GetRelContentIDs("{!Opportunity.Id}");
window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&RQD="+RQD+"&SourceID="+SourceID+"&CRL="+CRL+"&LA="+L
A+"&RC="+RC;
```

Send with DocuSign with Quotes, RC, Attachments, and Contact List

Description: With an Opportunity containing Attachments, RCs, and Quotes, this script retrieves Attachments, RCs, and Quotes, and the contact in the Opportunity Contacts.

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}
var RQD = DSGetPageIDFromHref();
var SourceID = "{!Opportunity.Id}";
```

```
var CRL = "";
var LA = "1";
var RC = GetRelContentIDs("{!Opportunity.Id}");
window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&RQD="+RQD+"&SourceID="+SourceID+"&CRL="+CRL+"&LA="+L
A+"&RC="+RC;
```

Send with DocuSign with Quotes, Attachments, RC, CRL and Contact List

Description: With an Opportunity containing Attachments, RCs, and Quotes, this script retrieves Attachments, RCs, and Quotes, the contact(s) in the Opportunity Contacts, and the names defined in CRL

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}
var RQD = DSGetPageIDFromHref();
var SourceID = "{!Opportunity.Id}";
var CRL = "Email~{!User.Email};FirstName~{!User.FirstName};LastName~
{!User.LastName},LoadDefaultContacts~1";
var LA = "1";
var RC = GetRelContentIDs("{!Opportunity.Id}");
window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&RQD="+RQD+"&SourceID="+SourceID+"&CRL="+CRL+"&LA="+L
A+"&RC="+RC;
```

Send with DocuSign with Quotes and CRL

Description: With an Opportunity containing Attachments, RCs, and Quotes, this script retrieves just the Quotes, and the names defined in CRL.

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}
var RQD = DSGetPageIDFromHref();
var SourceID = "{!Opportunity.Id}";
var CRL = "Email~{!User.Email};FirstName~{!User.FirstName};LastName~
{!User.LastName},LoadDefaultContacts~0";
var LA = "0";
var RC = "";
window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&RQD="+RQD+"&SourceID="+SourceID+"&CRL="+CRL+"&LA="+L
A+"&RC="+RC;
```

Send with DocuSign with Quotes, and Contact List

Description: With an Opportunity containing Attachments, RCs, and Quotes, this script retrieves just the Quotes, and the contact(s) in the Opportunity Contacts.

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}
var RQD = DSGetPageIDFromHref();
```

```
var SourceID = "{!Opportunity.Id}";
var CRL = "";
var LA = "0";
var RC = "";
window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&RQD="+RQD+"&SourceID="+SourceID+"&CRL="+CRL+"&LA="+L
A+"&RC="+RC;
```

Send with DocuSign with Quotes, CRL, and Contact List

Description: With an Opportunity containing Attachments, RCs, and Quotes, this script Pulls up just the Quotes, the contact(s) in the Opportunity Contacts, and the names defined in CRL.

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}
var RQD = DSGetPageIDFromHref();
var SourceID = "{!Opportunity.Id}";
var CRL = "Email~{!User.Email};FirstName~{!User.FirstName};LastName~
{!User.LastName},LoadDefaultContacts~1";
var LA = "0";
var RC = "";
window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&RQD="+RQD+"&SourceID="+SourceID+"&CRL="+CRL+"&LA="+L
A+"&RC="+RC;
```

Add Send with DocuSign Button to a Custom Object

The **Send with DocuSign** button allows Salesforce users to send documents to be signed from records in the Salesforce tabs. This procedure explains how to create and add the Send with DocuSign button to a custom object. If you have questions about customizing Salesforce, see the salesforce.com documentation for assistance.

1. From Salesforce.com, click **Setup** to go to the Force.com Home page.
2. In the left sidebar, under Build, click **Create** > **Objects**. Find your custom object in the list and open the custom object.
3. Scroll down to the Buttons, Links, and Actions section and click **New Button**.
4. In the New Button or Link page, complete the following:
   - **Label:** the button label (ex. Send with DocuSign)
   - **Name:** the unique ID for the button (ex. Send_with_DocuSign)
   - **Display Type:** select **Detail Page Button**
   - **Behavior:** select **Execute JavaScript**

- **Content Source:** verify setting is set to **OnClick JavaScript**. If Content Source does not change, select **OnClick JavaScript**.
- **Custom Button Editor:** enter the button script as follows:

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}
DocuSign_CreateEnvelope();
```

5. Click **Save**.
6. Open the instance of the custom object you want to add the DocuSign button to and select to **Edit Layout**. The page layout appears with the palette at the top of the page layout.
7. In the palette, click Buttons to show the available buttons.
8. From the palette, drag the **Send with DocuSign** button to the **Custom Buttons** box.
   Note: To remove this button from the page, drag the button from the **Custom Buttons** box back to the palette.
9. In the palette, click **Save** to save your edits to the page.
   Salesforce updates the layout by adding the **Send with DocuSign** button to the **Detail** section for the page.

Add DocuSign Status Related Lists to a Salesforce Layout

There are two types of related lists for DocuSign Status, which you can add to Salesforce layouts:

- **DocuSign Status** - Provides basic envelope details and overall status
- **DocuSign Recipient Status** - Provides detailed status for each recipient on an envelope

As part of the out-of-the-box DocuSign for Salesforce package, you can easily configure page layouts for the following Salesforce objects with the **DocuSign Status** related list:

- Accounts
- Contacts
- Leads
- Opportunities
- Contracts
- Cases

For the **DocuSign Recipient Status** related list, you can configure the page layouts for the following standard Salesforce objects:

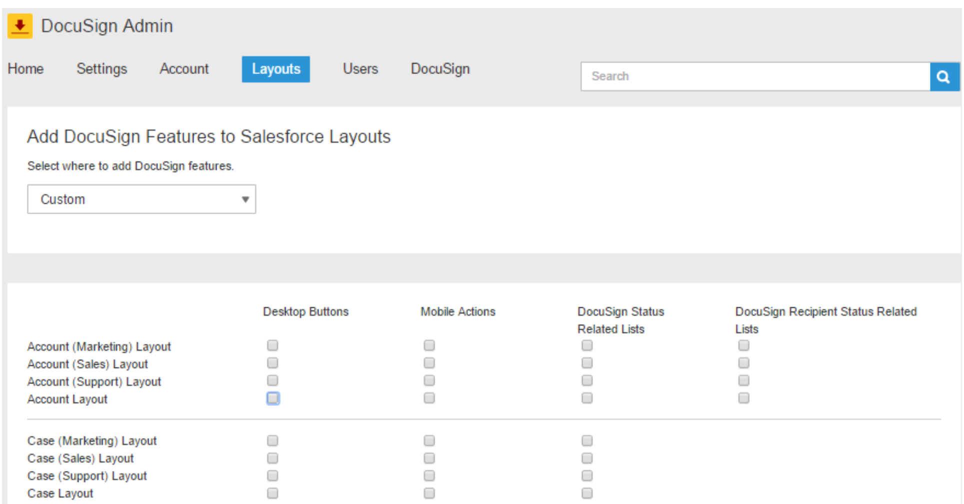
- Accounts
- Contacts
- Leads

This procedure explains only how to add the **DocuSign Status** and **DocuSign Recipient Status** related lists to page layouts for these standard Salesforce objects. If you have questions about customizing Salesforce, see the salesforce.comdocumentation for assistance.

Note: If your Salesforce organization cannot access the new Layouts pane, use the configuration steps in Configure for Organizations Without the Metadata API.

To add a DocuSign Status related list to a layout

1. From the Force.com App Menu, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab. The DocuSign Admin Home page appears.
3. Select the **Layouts** pane.



4. Under the **DocuSign Status Related Lists** and **DocuSign Recipient Status Related Lists** columns, check the layouts to which you wish to add the lists.
5. Click **Save**.

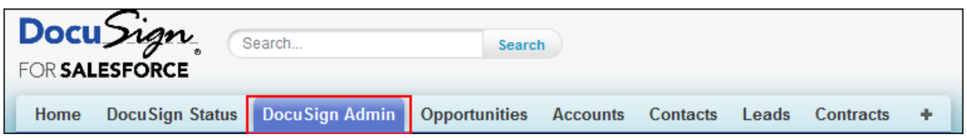
   Salesforce updates the layouts you selected with the custom related lists.

   Note: Refer to Add DocuSign Actions for Salesforce1 Mobile App Users for more information about adding DocuSign actions for your Salesforce1 users.

Add DocuSign Status to a Custom Object

This procedure explains only how to establish a relationship between a custom object and DocuSign Status and then add a DocuSign Status section to a Salesforce object. If you have questions about customizing Salesforce, see the salesforce.com documentation for assistance.

1. From Salesforce.com, click **Setup** to go to the Force.com Home page.
2. In the left sidebar, under Build, click **Create** > **Objects**.
3. From the list of objects, open the **DocuSign Status** custom object.
4. Scroll down to the Custom Fields and Relationships section and click **New**.
5. Select the following in the New Relationship steps:
    a. Select **Lookup Relationship** and click **Next**.
    b. In Related To select the custom object you want to establish a lookup relationship with and click **Next**.
    c. Enter the Field Label and Field Name information and click **Next**.
    d. Click **Next** two more times and click **Save**.
6. Click the **DocuSign Admin** tab.



7. Click the **DocuSign** tab. The DocuSign web application opens in a new browser window.

> **Note:** You might be asked to log in to DocuSign.

8. From the DocuSign application, click your profile image at the top of the application and select **Preferences**.
   The DocuSign Account Preferences page is displayed.
9. In the Navigation Pane on the left, under Account Administration, click **Connect**.
10. Scroll down, find the **dsfs_DocuSign_Status_c** object and click **Edit**.
    This page shows the list of Salesforce fields that are updated.
11. Scroll down on the page and click **Add** at the bottom of the Update Fields section. A new line is added to the Update Fields section.
12. In the Salesforce.com Field, select the lookup field for the custom object you want to establish a lookup relationship with (the custom object selected in step 3). In the DocuSign

Field, select **Envelope External Source ID**.

13. Click **Save & Close**.

Add DocuSign Buttons to the DocuSign Status Object

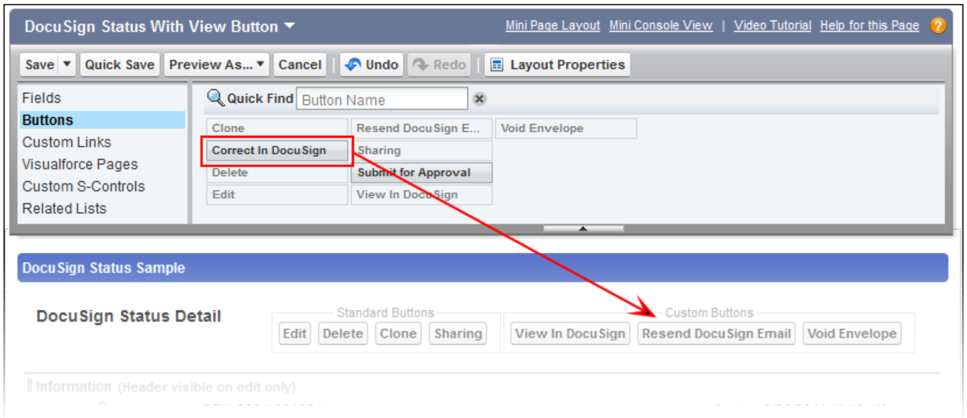
You can add other buttons to the DocuSign Status tab that provide additional functions for your users. The other buttons that are available to add to the layout are:

- **View in DocuSign:** Allows users to view an envelope in the DocuSign web application.
- **Correct in DocuSign:** If the Status for selected envelope is Sent or Delivered, this button opens the envelope in the DocuSign Add Tags page. Users can make changes to the document, recipients and tags in the envelope for recipients that have not signed documents in the envelope.
- **Resend DocuSign Email:** If this button is in the Envelope status, clicking it resends the envelope to recipients with a Sent or Delivered status. If the button is in the Recipient status, clicking it resends the envelope this recipient.
- **Void Envelope:** This can only be used if the envelope status is Sent or Delivered. Clicking this button cancels the envelope and marks it as voided. Once an envelope is voided, recipients can no longer view or sign the envelope. Recipients that signed an envelope that is subsequently voided are sent an email informing them that the envelope was voided and providing the reason it was voided.

To add DocuSign buttons to the DocuSign Status object

1. Click the **DocuSign Status** tab.
2. Select any of the envelopes in the list.
3. Click **Edit Layout** in the upper right of the page.
4. The page layout appears with the palette at the top of the page layout.
5. In the palette, click **Buttons** to show the available buttons.

6. From the palette, drag the button you want to add to the **Custom Buttons** box.



Note: To remove a button from the page, drag the button from the Custom Buttons box back to the palette.

7. In the palette, click **Save** to save your edits to the page.
   Salesforce updates the object by adding the buttons to the layout.

DocuSign for Salesforce1 Mobile App Users

DocuSign for Salesforce supports the Salesforce1 mobile app. You can add the DocuSign action to the following standard Salesforce objects:

- Opportunities
- Leads
- Cases
- Contacts
- Accounts

Note: Currently, the out-of-the-box DocuSign action is only supported for these standard objects. Custom objects and custom buttons are not supported at this time.

Once you configure your Salesforce environment to include the DocuSign action, your Salesforce1 mobile app users can easily send documents for electronic signature with DocuSign.

This section describes how to configure Salesforce for this feature. Information on how to use the DocuSign action is included in the *DocuSign for Salesforce User Guide*.

Prerequisites

In order for your mobile app users to use the DocuSign action, the following prerequisites must be met:

- Salesforce1 is enabled for your Salesforce environment
- Chatter is enabled for your Salesforce environment
- Publisher Actions are enabled for your Salesforce environment (From Setup, click **Customize > Chatter > Settings** and edit the settings to enable **Publisher Actions**)
- Enable users actions to trigger DocuSign Connect events by selecting the users to integrate with DocuSign Connect (See Changing DocuSign Connect for Salesforce Settings)
- DocuSign Chatter is enabled for your DocuSign account (See Managing DocuSign Account Settings)

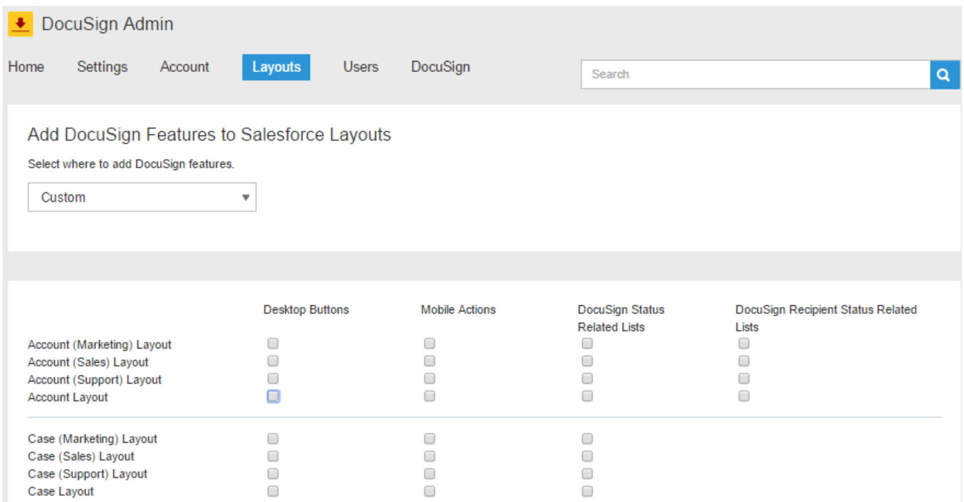
Additional Prerequisites for Beta Feature: Enable DocuSign Mobile App Tagging

To evaluate the new DfS v5.6 Beta feature for DocuSign mobile app tagging, Salesforce1 users must meet the additional following prerequisites:

- Have an iOS or Android mobile device
- Install the appropriate DocuSign mobile app for iOS or Android

Configure DocuSign Actions

This topic explains how to add the DocuSign action to a Salesforce Object, allowing your Salesforce1 mobile users to send documents with DocuSign. You can add the DocuSign action to the following standard objects: Leads, Accounts, Contacts, Opportunities, and Cases. You use the DocuSign Admin Layouts page to add the DocuSign action for your Salesforce1 mobile users:



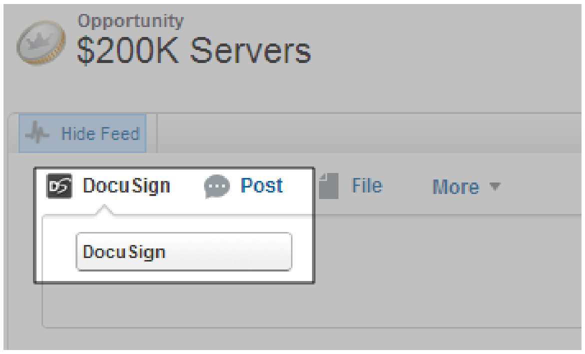
Note: If your Salesforce organization cannot access the new Layouts pane, use the configuration steps in Configure for Organizations Without the Metadata API.

To add the DocuSign action to mobile layouts

1. From the DocuSign Admin tab, select the **Layouts** pane.
2. To quickly add the DocuSign action to all Salesforce1 layouts, from the drop-down list, select **Mobile Actions**.
3. To create a custom set of features, select **Custom**, and then, under the Mobile Actions column, check the layout options you wish to add.
4. Click **Save**.

   The features you selected are applied and available on the Salesforce layouts.

   Note: This setup also adds the DocuSign action to the Chatter feed for Opportunity objects. This DocuSign button does the same thing for non-Salesforce1 mobile app users as the out-of-the-box **Send with DocuSign** buttons, provided with the DocuSign for Salesforce package.



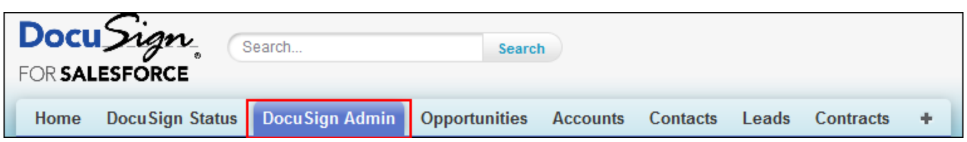
Enable Mobile Tagging for iOS and Android (Beta)

Salesforce1 mobile app users are invited to evaluate an improved sending experience, using the DocuSign mobile app to tag documents for signature. Salesforce1 users must install the free DocuSign mobile app for either iOS or Android to take advantage of this integration. The salesforce administrator must enable the feature for the DocuSign for Salesforce account.

This option is offered as a Beta feature, supporting iOS and Android mobile devices only. This Beta feature is a new integration with the DocuSign mobile apps for Android and iOS. Interested customers should try it out and provide feedback at dfsfeedback@docusign.com. While we are initially offering this as an option for administrators to enable for testing, it is our expectation that this feature will become the default mobile experience in a future release.

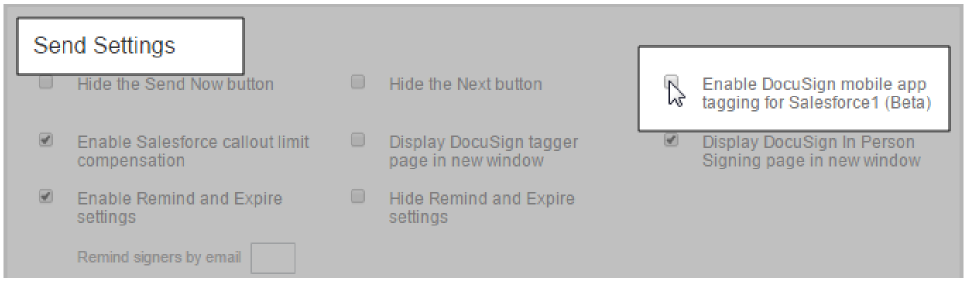
To enable DocuSign mobile app tagging (Beta)

1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.



The DocuSign Admin Home page appears.

3. Click the **Settings** pane.
4. In the Send Settings section, select the **Enable DocuSign mobile app tagging for Salesforce1 (Beta)**:



With this setting enabled, all Salesforce1 mobile users who have the latest DocuSign mobile app for iOS or Android installed, will automatically use the app for tagging and sending their documents. If the user does not have the mobile app installed, they are prompted to install the app. If they have a different operating system, then the current embedded web browser experience is presented.

Note: This is a Beta feature release. Please see the *DfS v5.6 Release Notes* for exceptions regarding functionality and use.

Managing DocuSign Settings

This section provides information on the DocuSign for Salesforce settings. These settings set the defaults for all envelopes sent by all DfS users. These settings include the following:

- Change Email Settings —The Email Settings section is used to set whether senders can edit the Email Subject and Email Message when sending envelopes, and to create email settings with default Email Subject and Email Message for different languages.
- Change Recipient Roles —Recipient Roles are used to map to the automatic anchor tags in your documents.
- Change Send Settings —The Send Settings control default reminder and expiration settings for envelopes. You can also use these settings to hide DocuSign send and tag buttons.
- Change Chatter Settings—The Chatter Settings determine whether Chatter is enabled for DocuSign events, and which envelope and recipient events generate a Chatter post.

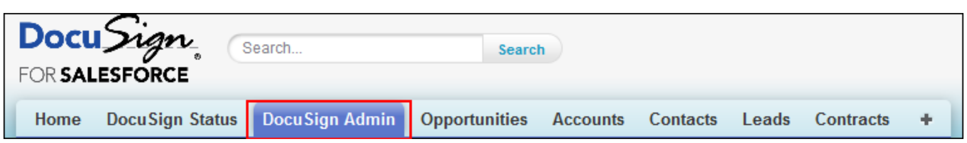
Change Email Settings

You can modify the email settings used by default for all DocuSign envelopes sent through Salesforce.

The Email Settings section is used to set if senders can edit the Email Subject and Email Message when sending envelopes, and to create email settings with default Email Subject and Email Message for different languages.

Important: When your users are sending envelopes, they can only select languages that have been added to the account email settings. For example, if you want users to be able to send messages in German, you must add a default email setting with German as the language.

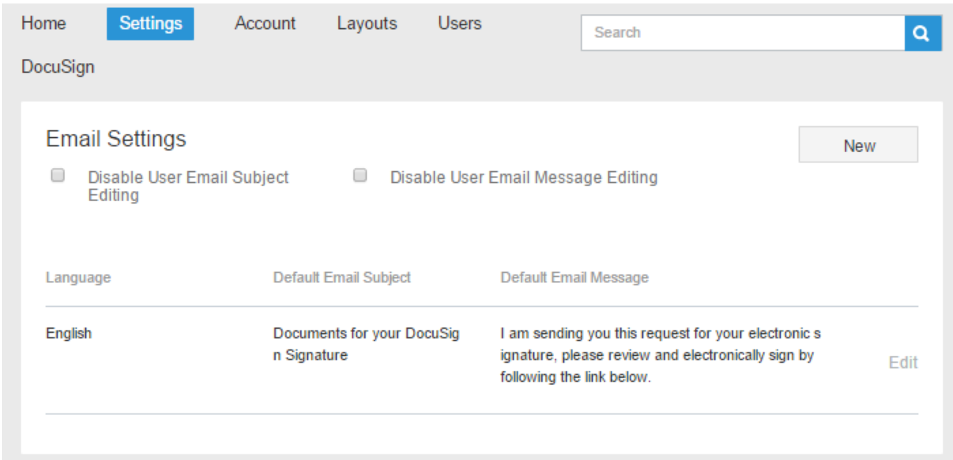
1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.



   The DocuSign Admin Home page appears.

3. Click the **Settings** tab. The Settings page appears showing the current settings for DocuSign for Salesforce Email Settings, Recipient Role Settings, Send Settings and Chatter Settings.

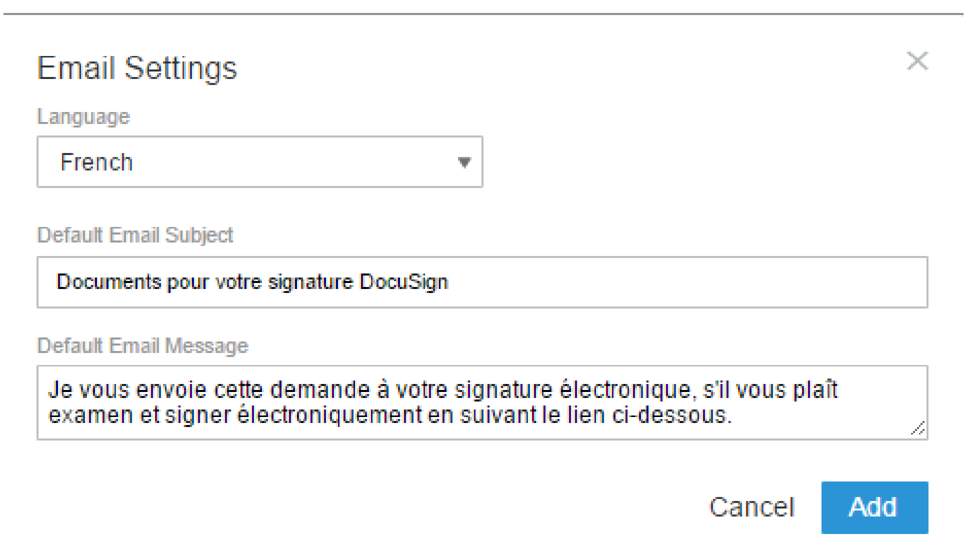
4. In the Email Settings section, set the user editing options:



- **Disable User Email Subject Editing** - Select this check box to prevent senders from editing the Email Subject. If this option is selected, the default email subject is used for the envelope and account users cannot modify the subject for envelopes they send.
- **Disable User Email Message Editing** - Select this check box to prevent senders from editing the Email Message. If this option is selected, the default email message is used for the envelope and account users cannot modify the message for envelopes they send.

> **Note:** Custom Button Logic can override these editing options.

5. To add a new email setting, click **New**.



a. Select the **Language** for the email setting. The available languages are: US English, Japanese, German, French, Italian, Spanish, Simplified Chinese, Russian, Korean, Portuguese and Dutch.

b. Type the **Default Email Subject** for the envelope. This is the subject line of the email sent to envelope recipients. You must enter a subject.

c. Type the **Default Email Message** for the envelope. This is the body text used in the email sent to envelope recipients.

d. Click **Save** to save the email setting and return to the Envelope Settings page.

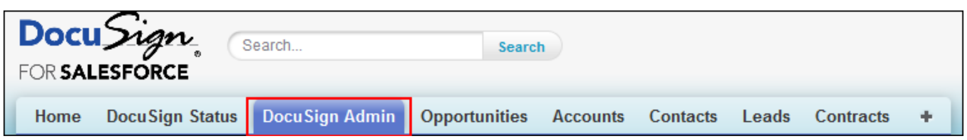
6. To edit an email setting, click **Edit** adjacent to the setting you want to edit. Make the changes to the setting and click **Add**.
7. To delete an email setting, click the **X** adjacent to the setting you want to delete. You cannot delete the English email setting.

Change Recipient Role Settings

Recipient roles are used to map to the automatic anchor tags in your documents. To learn more about anchor tags, see Automatic Anchor Text and Tags.

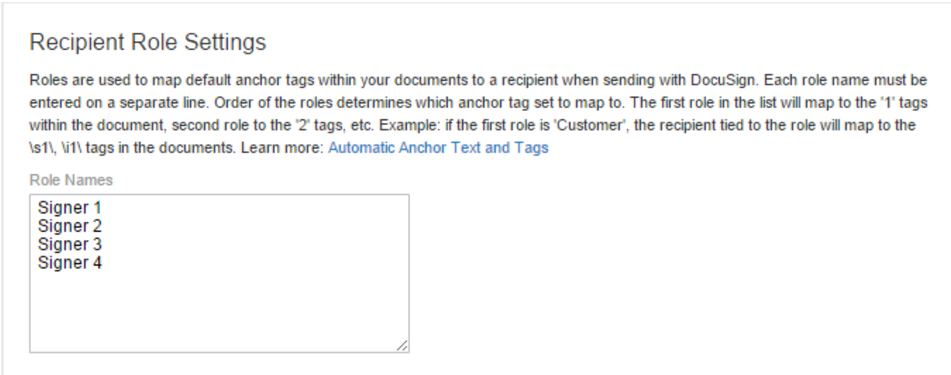
To change the Recipient Role Settings information

1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.



The DocuSign Admin Home page appears.

3. Click the **Settings** tab. The Settings page appears showing the current settings for DocuSign for Salesforce Email Settings, Recipient Role Settings, Send Settings and Chatter Settings.
4. In the Recipient Role Settings section, add, edit, or remove Role Names as desired:



5. In the **Role Names** field:
   - To add a new role, type the Role Name you want to have in the **Signer Role** list in the DocuSign Recipient window. Each Role Name must be entered on a separate line.
   - To edit an existing role, move your cursor to the Role Name and edit the Role Name text.
   - To remove a role, select the Role Name and delete the text.
6. Click **Save** to save your settings changes.

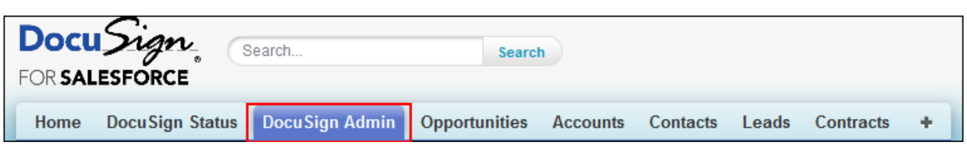
Change Send Settings

The Send Settings control default reminder and expiration settings for envelopes. You can also use these settings to hide DocuSign send and tag buttons.

Note: Envelope custom fields configured for your DocuSign account are not available from within DocuSign for Salesforce. The integration uses these custom fields for other data integration purposes. Normally, when preparing a new envelope, users see any available envelope custom fields under Envelope Settings. However, users sending envelopes from Salesforce do not see any envelope custom fields that are configured for your DocuSign account. These custom fields are still available when sending envelopes directly from the DocuSign application.

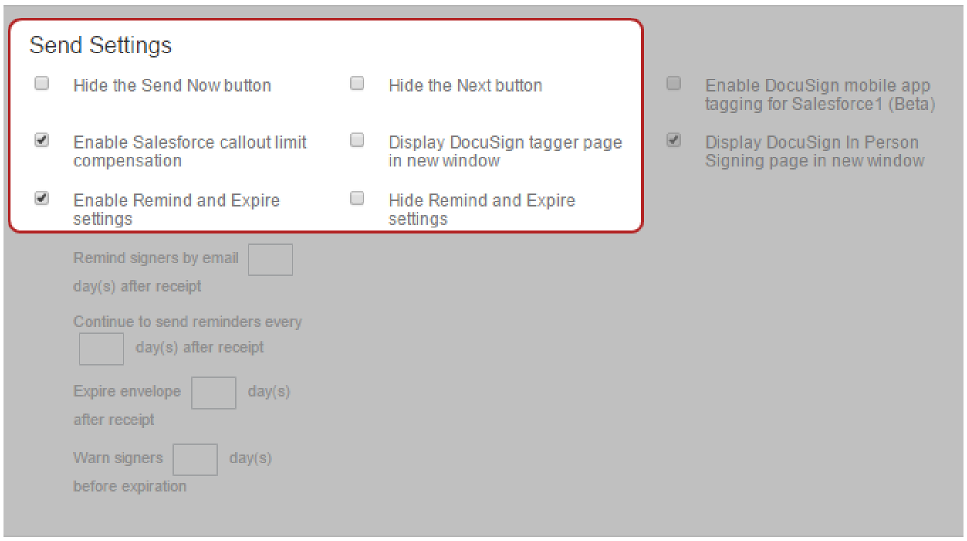
To change the Send Settings information

1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.



The DocuSign Admin Home page appears.

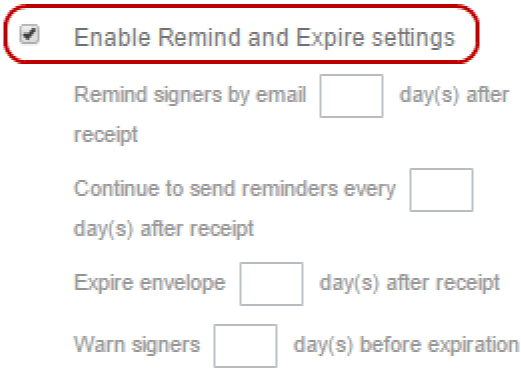
3. Click the **Settings** tab. The Settings page appears showing the current settings for DocuSign for Salesforce Email Settings, Recipient Role Settings, Send Settings, and Chatter Settings.
4. In the Send Settings section, you can opt to hide certain DocuSign features from account members:



- **Hide the Send Now Button**: Hides the Send Now button, forcing senders to the tagging page.
- **Hide the Next Button**: Hides the Next button, forcing senders to use the Send Now feature and skip tagging.
- **Hide the Remind and Expire Settings**: Hides the Reminder and Expire Settings fields from account members. If this option is selected, the default reminder and expiration information is used for the envelope and account users cannot modify these settings for envelopes they send.

Note: Custom Button Logic can override this option.

5. Also in the Send Settings section, you can enable and set default Reminder and Expiration values for your account:
   a. **Enable Reminder and Expiration Settings**. This setting gives Salesforce administrators the ability to determine whether users can modify reminder and expiration settings for their DocuSign envelopes, or if the default settings from the DocuSign account, or the settings in a saved template, are enforced.



The selection for Enable Remind and Expire Settings has the following effects:

- **If selected**: The values entered in the subsequent fields are the default values applied to new envelopes created in DfS. Senders can opt to modify these values when preparing envelopes.
- **If cleared**: The subsequent fields do not display on the Send Settings, and the DocuSign account default settings are applied to all envelopes. If a template is used, then the reminder and expiration settings for the template are enforced on the resulting envelope. Senders cannot modify these values when preparing envelopes.

b. **Set Remind and Expire default values.** Set values for the following as needed:

- **Remind signers by email N day(s) after receipt**: This option sets when a reminder email is sent to recipients who have not yet signed. If no value is entered, reminder emails are not sent.
- **Continue to send reminders every N day(s) after receipt**: This option sets when a subsequent reminder email is sent to recipients who have not yet signed. If no value is entered, subsequent reminder emails are not sent by the system.
- **Expire envelope N day(s) after receipt**: This option sets when an incomplete envelope expires in the system. If no value is entered, the envelope does not expire.
- **Warn signers N day(s) before expiration**: This option sets when an email warning that an envelope is about to expire is sent to recipients who have not yet signed. If no value is entered, warning emails are not sent by the system.

6. Optionally, select the **Enable Salesforce callout limit compensation** check box. This option determines how Salesforce documents are accessed by DocuSign. The selection has the

following effects:

- **If selected**: DocuSign retrieves the documents from Salesforce using a web service call. If you send large documents for signing, it might be possible to exceed the Salesforce callout limit of 3MB and this option should be selected to avoid exceeding this limit.
- **If cleared**: The documents are sent to DocuSign during when the document is sent or tagged. If your Salesforce documents are small (less than 2 MB), this option can be cleared to avoid multiple web service calls. This option is selected by default.

7. Click **Save** to save your settings changes.

Change Chatter Settings

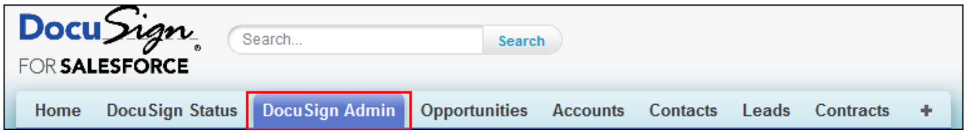
The Chatter Settings determine whether Chatter is enabled for DocuSign events, and which envelope and recipient events generate a Chatter post.

A language setting allows administrators to select from 11 language options, providing default Chatter messages in the chosen language for all users. The available language selections are:

- English
- Chinese (Simplified)
- Dutch
- French
- German
- Italian
- Japanese
- Korean
- Portuguese (Brazil)
- Russian
- Spanish

To change Chatter settings

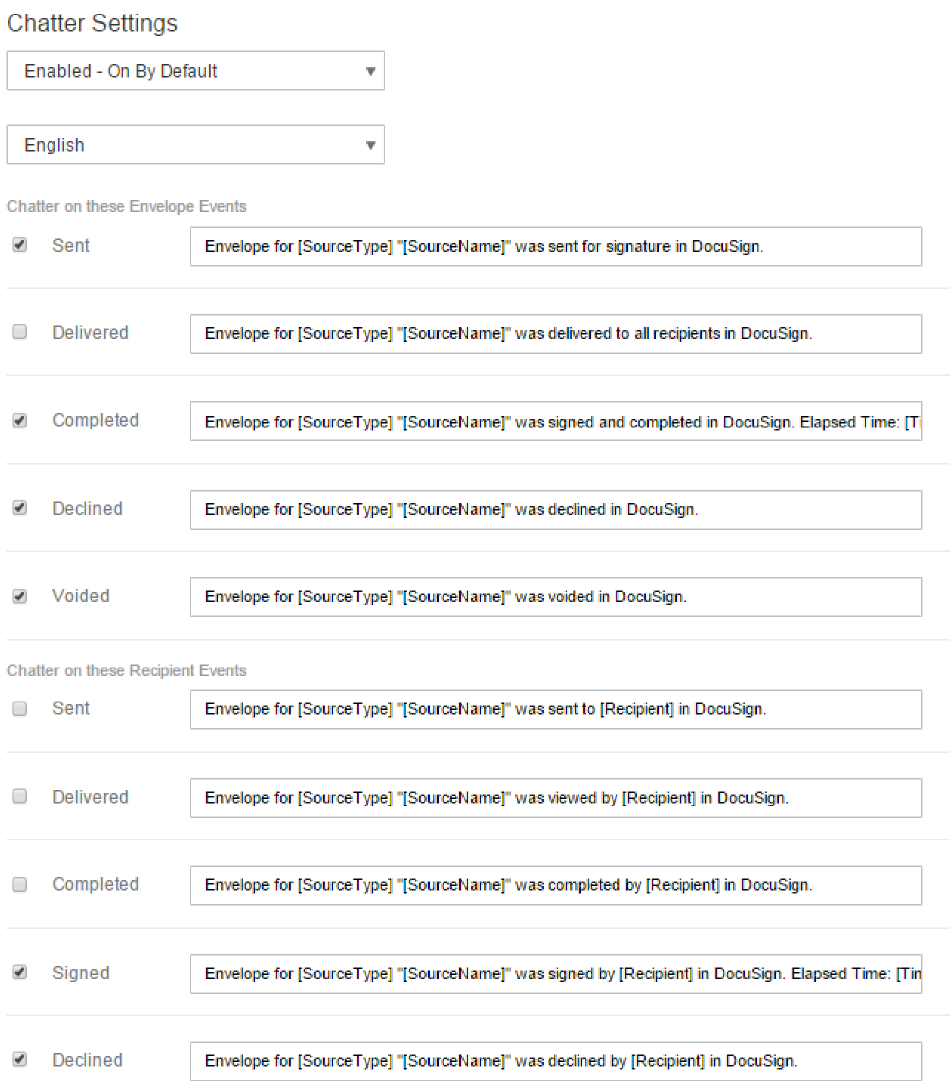
1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.



The DocuSign Admin Home page appears. Click the **Settings** tab.

The Settings page appears showing the current settings for DocuSign for Salesforce Email Settings, Recipient Role Settings, Send Settings and Chatter Settings.

3. In the **Chatter Settings** section, you can opt to hide certain DocuSign features from account members. Chatter messages are displayed to the base object of the send operation. For example, when an envelope is sent from an Opportunity, Chatter updates for the envelope are displayed on that Opportunity.

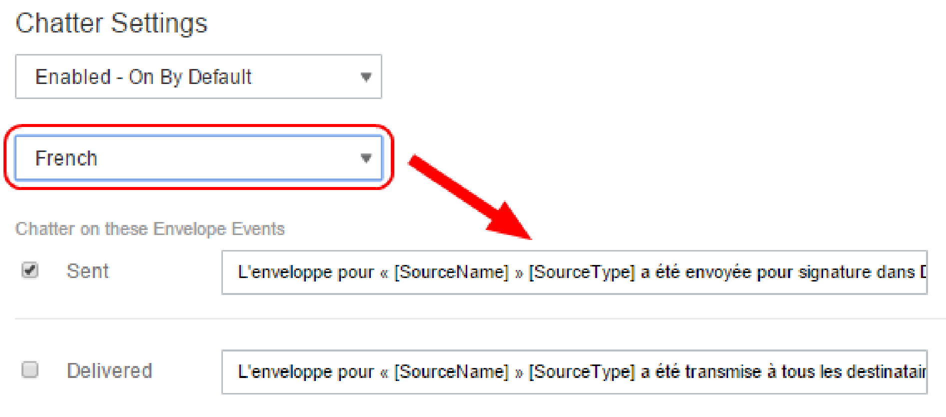


a. Select the **Chatter** display option for account users.

- **Enabled - Always On** - Chatter messages are enabled for the selected Envelope and Recipient events appear in the Chatter feed.
- **Enabled - On By Default** and **Enabled - Off By Default** selections enable Chatter messages and set them on or off for users. Users can set if they want the Chatter message on or off when they send a document.
- **Disabled** - Chatter messages are disabled for all users.

> **Note:** Custom Button Logic can override this option.

b. Select the Chatter display language. The predefined Chatter messages display in the selected language for all users.



c. Select the **Envelope** and **Recipient Events** that trigger Chatter messages. Additionally, you can customize the Chatter messages sent for the different envelope and recipient events using the text boxes in the Chatter Settings.

   You can use free-form text in the Chatter message text fields. Additionally, you can use Salesforce macros to substitute text in the message. Macros can be repeated within a text message and macro names are not case sensitive. If the value for a macro cannot be determined, an empty string is inserted. To add the macro to the text, enclose the macro name in brackets (Example : [SourceType]).

4. Click **Save** to save your changes.

Supported Chatter macros

The macros supported for Chatter are as follows:

Macro	Description
[Sender]	The name of person that sent the envelope.
[SenderEmail]	The email address of the person that sent the envelope.
[SourceType]	The type of Salesforce object used as the base object to send the envelope (Examples: Opportunity or Account).
[SourceName]	The value of the Name field of the Salesforce source object (Example: the Opportunity name).
[DocumentList]	A comma separated list of the document names included in the envelope. If a template was used, the template ID is displayed as: DS Template:<id>.

Macro	Description
[Envelope]	The ID of the Envelope record stored in Salesforce.
[TimeFromSent]	The elapsed time from when the envelope was reported as Sent until the time of the current event (the event that triggers the message). This macro does not apply to Sent events.
[RecipientList]	A comma separated list of the names of the recipients of the envelope.
[Recipient]	The name of the current recipient. This macro only applies to Recipient Events.

Managing DocuSign Account Settings

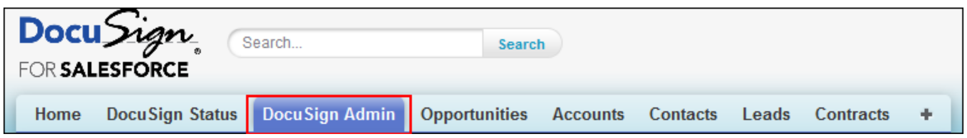
This procedure provides information on changing your account configuration. You can make changes to DocuSign Connect settings or to the DocuSign System Sender User. The DocuSign System Sender User is the Send On Behalf Of sender for the account. To change your configuration, you go back through the configuration steps to connect your DocuSign account to Salesforce as described in Configure DocuSign for Salesforce.

Some common scenarios for making changes to your configuration:

- You update your password for either the DocuSign of Salesforce admin accounts
- You have been testing in a Salesforce sandbox environment and now you want to move to production accounts

To modify your account configuration

1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.
   The DocuSign Admin Home page appears.



3. Click the **Account** tab.

   The DocuSign Account page appears showing the current DocuSign account information.
4. Click **Modify Account Configuration**.
5. Log in to the DocuSign admin account to use with Salesforce as the DocuSign System Sender User. This can be a different account than you originally used to configure DocuSign for Salesforce.
6. On the Connect DocuSign to Salesforce screen, enter the Salesforce User name and Salesforce Password to connect to, and select the appropriate Salesforce environment.
7. Click **Connect**.

Custom Buttons

With the DocuSign for Salesforce managed package, you can create custom buttons to help better manage your common tasks.

Custom button configuration is supported by using the Salesforce Custom Buttons and Links functionality to create Detail Page Buttons that contain "OnClick JavaScript." The JavaScript logic provided determines what custom actions are performed by the button.

- Custom Button Configurations
- Create Custom Buttons
- In Person Signing Custom Buttons
- Sign Now Custom Buttons

Custom Button Configuration

This section has the Sample Custom Button JavaScript Code and shows the parameter settings needed for the different types of custom buttons. Most of these parameters are optional, except for those listed in Required Parameters.

The Sample Custom Button JavaScript Code provided in this section contains all of the options and parameter settings for the different types of custom buttons. To use the sample code, just copy it into a text editor, set the parameters you want use (you can delete or comment out the others) and copy the code to the code section of the New Button or Link page when creating the button.

- Required Parameters
- Review Screen Appearance and Function
- Customize Envelope Contacts
- Customize Envelope Contact Roles
- Customize Envelope Documents
- Sample Custom Button JavaScript Code

Required Parameters

The following parameters are required for all custom buttons. All other parameters are optional.

DocuSign Envelope ID

```
DSEID = 0
```

Salesforce Object Source ID

`SourceID = {!SFObject.Id}`

This is the Salesforce merge field for the id of the object where the button is to be placed.

Example: If you are creating a button in the Account Layout use `SourceID = {!Accounts.Id}`, if in the Opportunity Layout use `SourceID = {!Opportunity.id}`.

Review Screen Appearance and Functionality

Show Tag Button

Parameter	Values	Notes
STB=	• 1 (ON) • 0 (OFF) • Not supplied	If STB='1'; the Tag button is shown. If no value supplied, the setting in DocuSign Admin, Envelope Settings tab is used.

Show Send Button

Parameter	Values	Notes
SSB=	• 1 (ON) • 0 (OFF) • Not supplied	If SSB='1'; the Send button is shown. If no value supplied, the setting in DocuSign Admin, Envelope Settings tab is used.

Show Email Subject

Parameter	Values	Notes
SES=	• 1 (ON) • 0 (OFF) • Not supplied	If SES='1'; the Email Subject field is shown. If no value supplied, the setting in DocuSign Admin, Envelope Settings tab is used.

Show Email Message

Parameter	Values	Notes
SEM=	• 1 (ON) • 0 (OFF) • Not supplied	If SEM='1'; the Email Message field is shown. If no value supplied, the setting in DocuSign Admin, Envelope Settings tab is used.

Show Remind Expire

Parameter	Values	Notes
SRS=	• 1 (ON) • 0 (OFF) • Not supplied	If SRS='1'; the envelope reminder and expiration fields are shown. If no value supplied, the setting in DocuSign Admin, Envelope Settings tab is used.

Show Chatter

Parameter	Values	Notes
SCS=	• 1 (ON) • 0 (OFF) • Not supplied	If SCS='1'; the Salesforce Chatter information is shown. If no value supplied, the setting in DocuSign Admin, Envelope Settings tab is used.

One Click Options

Parameter	Values	Notes
OCO=	• Send • Tag	If OCO='Send'; The system attempts to send the envelope. If successful, the send confirmation page is displayed. If a required envelope element (recipient email, document, etc.) is missing, the envelope review screen with errors listed is displayed. If OCO='Tag'; The user is taken to the DocuSign envelope tagging page.

Reminder and Expiration Settings

Parameter	Values	Notes
RES=	See Notes	There are six comma-separated settings for this parameter: Remind Via Email, Remind In N Days, Repeat Remind In N Days, Expire-Void Envelope, Expire-Void Envelope In N Days, Warn Expire Void In N Days. Remind Via Email and Expire-Void Envelope are on (1)/off (0) switches, while the other items set the number of days for the other settings. **Example**: If RES ='1,2,3,1,120,3';, then the system will send an email reminder, the reminder is sent 2 days after the original email, the reminder is repeated every 3 days, the envelope will expire/void, the envelope will expire/void in 120 days, and an email warning that the envelope will expire/void is sent 3 days before the

Parameter	Values	Notes
		expiration. If no value supplied, the setting in DocuSign Admin, Envelope Settings tab is used.

Custom Email Message

Parameter	Values	Notes
CEM=	A text string with the email message.	The message text string supports the use of custom tags, such as: [FirstName] = sender first name, [LastName] = sender last name, and [Email] = sender email. The text string also supports Salesforce merge fields. **Example**: CEM='Envelope sent by [FirstName] [LastName] ([Email]) for {!Opportunity.Name}'; The text string is limited to 2000 characters. Anything beyond 2000 characters is truncated in the email message. If no value supplied, the default email message is used. The default message is set in DocuSign Admin, Envelopes, as described in Changing Email Settings. Fields that are text strings must not contain either ',' (comma) or ';' (semicolon), since those two characters are used to parse the string. Since commas and semicolons could be used in the RecipientNote, you can specify _COMMA_ or _SEMI_ to embed a ',' or ';' in the note. '\\n' can be used to embed a carriage return in the note. **Example**: If RecipientNote~RecipientNote__c is: "Hi_COMMA_\\nThis is a wonderful opportunity_SEMI_ please sign.\\nThank you." The note appears as: Hi, This is a wonderful opportunity; please sign. Thank you.

Custom Email Subject

Parameter	Values	Notes
CES=	A text string with the email subject.	The subject text string supports the use of custom tags, such as: [FirstName] = sender first name, [LastName] = sender last name, and [Email] = sender email. The text string also supports Salesforce

Parameter	Values	Notes
		merge fields. **Example**: CES='Envelope 'Re: Order Number: {!Opportunity.OrderNumber_c}'; Text string fields must not contain either ',' (comma) or ';' (semicolon), since those two characters are used to parse the string. You can specify _COMMA_ or _SEMI_ to embed a ',' or ';' in the string. If no value supplied, the setting in DocuSign Admin, Envelope Settings tab is used.

Customize Envelope Contacts

Custom Related Contact List

Parameter Values	Notes
CRCL= See Notes	This feature allows the selection of recipients from a custom list related to the object where the button is placed. Possible Values are: SFObjectRelation__r,Email~SFObjectEmailCol__c; FirstName~SFObjectFirstNameCol__c; LastName~SFObjectLastNameCol__c; Role~SFObjectRoleCol__c; RoutingOrder~SFObjectRoutingOrderCol__c; AccessCode~SFObjectAccessCodeCol__c; RecipientNote~SFObjectRecipientNoteCol__c; SignNow~SFObjectSignNowCol__c, SignInPersonName~SFObjectSignInPersonNameCol__c, LoadDefaultContacts~1 **Example**: If sending from an Opportunity, a custom object with the following fields could be created and associated with the Opportunity: FirstName~First_Name__c;LastName~Last_Name__c; Role~Role__c;Email~Email_c The SFObjectRelationName__r value is the Salesforce Object name of the relationship. The other items are column mappings that determine the values for how contacts are added to the envelope. If the custom object does not have both First Name and Last Name or contains only one column for the Name, omit the FirstName~ mapping and point the LastName~ mapping to the column. Your custom object must have a mapping for the Email, while the Role, RoutingOrder, AccessCode, RecipientNote and SignNow

Parameter Values	Notes
	are optional. RoutingOrder, if specified, must be a positive integer value. The RoutingOrder value supersedes any RROS and RRSO options that are specified. The RoutingOrder is ignored if the "DocuSign Template" option is added. SignNow, if specified, must be either '0' or '1'. If SignNow='1'; an email is sent to the recipient and the recipient is immediately presented with the DocuSign signing page. If SignNow='0'; an email is sent to the recipient and the recipient is not immediately presented with the signing page. The default value for SignNow is '0'. SignNow only functions correctly if the recipient email and user name are the same as the current Salesforce user's email and user name. If the Recipient email and user name do not match the current Salesforce user's email/username the SignNow value is ignored. Fields that are text strings must not contain either ',' (comma) or ';' (semicolon), since those two characters are used to parse the string. Since commas and semicolons could be used in the RecipientNote, you can specify _COMMA_ or _SEMI_ to embed a ',' or ';' in the note. '\\n' can be used to embed a carriage return in the note. **Example**: If RecipientNote~RecipientNote__c is: "Hi_COMMA_\\nThis is a wonderful opportunity_SEMI_ please sign.\\nThank you." The note appears as: Hi, This is a wonderful opportunity; please sign. Thank you. The LoadDefaultContacts parameter determines if default contacts for the source object type are loaded (0 – do not load, 1 – load). These contacts will be loaded after the Custom Related Contacts. If no value is supplied, the standard contact selection applies.

Custom Recipient List

Parameter	Notes
CRL= See Notes	This feature allows the definition of recipients to add to the envelope. The recipient information can be specified directly or it can be derived from the object where the button is placed. Possible Values are: Email~;FirstName~;LastName~;Role~; SignInPersonName~;RoutingOrder~;AccessCode~;

Parameter	Notes
	RecipientNote~;SignNow~, LoadDefaultContacts~1 You can specify multiple comma-separated recipients but the length of the entire CRL string must be 1000 characters or less. **Example**: If sending from an Opportunity, a custom recipient list can be created with one recipient associated to the opportunity's owner and a second recipient could be added with predefined values: Email~{!Opportunity.OwnerEmail};Role~Signer 1; FirstName{!Opportunity.OwnerFirstName}; LastName{!Opportunity.OwnerLastName}; RoutingOrder~4,Email~john.doe@docusign.com; FirstName~John;LastName~Doe;AccessCode~1234; RecipientNote~Please sign this document; SignNow~1,LoadDefaultContacts~1 If you do not want to specify both First Name and Last Name, omit the FirstName~ mapping and define the LastName~ mapping. Your custom list must have a mapping for the Email. Role, RoutingOrder, AccessCode, RecipientNote, SignNow and SignInPersonName values are optional. RoutingOrder, if specified, must be a positive integer value. The RoutingOrder value supersedes any RROS and RRSO options that are specified. The RoutingOrder is ignored if the "DocuSign Template" option is added. SignNow, if specified, must be either '0' or '1'. If SignNow='1'; an email is sent to the recipient and the recipient is immediately presented with the DocuSign signing page. If SignNow='0'; an email is sent to the recipient and the recipient is not immediately presented with the signing page. The default value for SignNow is '0'. SignNow functions correctly only if the recipient email and user name are the same as the current Salesforce user's email and user name. If the Recipient email and user name do not match the current Salesforce user's email/username the SignNow value is ignored. Also, if there are multiple signers, the SignNow recipient must be the first signer. Text string fields must not contain either ',' (comma) or ';' (semicolon), since those two characters are used to parse the string. Since commas and semicolons could be used in the RecipientNote, you can specify _COMMA_ or _SEMI_ to embed a ',' or ';' in the note. '\\n' can be used to embed a carriage return in the note. **Example**: If RecipientNote~RecipientNote__c is: "Hi_COMMA_\\nThis is a wonderful opportunity_SEMI_ please sign.\\nThank you." The note appears as: Hi, This is a wonderful opportunity; please sign.

Parameter	Notes
	Thank you. The LoadDefaultContacts parameter determines if default contacts for the source object type are loaded (0 – do not load, 1 – load). These contacts will be loaded after the Custom Recipient List recipients. If no value is supplied, the standard contact selection applies. If DST is also specified in the script then the Routing Order in the template takes precedence over the routing order specified in CRL. If both CRCL and CRL are specified in the script, CRCL recipients are processed first and then CRL recipients are added. Also, the LoadDefaultContacts setting from the CRCL option is used, even if the default value must be used because the CRCL string did not contain a LoadDefaultContacts setting. **Dependency on other custom logic options:** The CCTM option is used to map Roles specified in CRL list to DocuSign signing types. For example: CCTM='Signer 1~Signer;Signer 2~Sign in person' If templates are being used, the CCRM option can be used to map Salesforce Role names to DocuSign roles. For example: CCRM='Decision Maker~Signer 1;Executive Sponsor~Signer 2'; If OCO=Send is also specified in the script, then the LastName and Email parameters, with values, are required.

Recipient Signer Limit

Parameter Values	Notes
RSL= Positive Integer	This sets the maximum number of recipients for an envelope. If no value supplied, there is no limit on the number of recipients.

Contact Routing Order Sequential

Parameter Values	Notes
RROS= • 1 (ON)	This turns on or off the sequential routing order for recipients based on the order they are added to the envelope. This option is ignored if the "DocuSign Template" option is added.

Parameter Values	Notes
• 0 (OFF) • Not supplied	If no value supplied, the standard contact routing order selections apply. Recipients are added to the envelope and assigned to a routing order in the following order: 1. Recipients from the CRCL option 2. Recipients from the CRL option 3. Recipients from the base Salesforce object

Contact Starting Routing Order

Parameter Values	Notes
RSRO= Positive Integer	This option sets the routing order number for the first contact to specified number. The routing order for the following contacts use the default settings (everyone is routing order 1) or based on other routing order settings (the Contact Routing Order Sequential). This option is ignored if the "DocuSign Template" option is added. If no value supplied, the standard contact routing order selections apply.

Customize Envelope Contact Roles

Custom Contact Role Map

Parameter Values	Notes
CCRM= See Notes	This parameter allows you to map a Salesforce Role to a specified DocuSign Role. This parameter is only used with templates and should not be used in conjunction with a Custom Contact Note Map (CCNM) parameter. **Example**: SF Role 1~DS Role 1;SF Role 2~DS Role 2;SF Role 3~DS Role 3;SF Role 4~DS Role 4; If no value is supplied, the standard contact role selections apply.

Custom Contact Note Map

Parameter Values	Notes
CCNM= See Notes	This parameter allows you to map a Salesforce Role to a specified Note. The DEFAULT_ NOTE value is used when a Role cannot be mapped. This parameter is only used with templates and should not be used in conjunction with a Custom Contact Role Map (CCRM) parameter. **Example**: SF Role 1~Note 1;SF Role 2~Note 2;DEFAULT_NOTE~Note 3; If no value is supplied, the standard contact note selections apply.

Custom Contact Type Map

Parameter Values	Notes
CCTM= See Notes	This parameter allows you to map a Salesforce Role to a specified DocuSign Signer Type. **Example**: SF Role 1~DS Type 1;SF Role 2~DS Type 2;SF Role 3~DS Type 3;SF Role 4~DS Type 4; If no value is supplied, the standard contact role selections apply.

Customize Envelope Documents

DocuSign Template

Parameter Values	Notes
DST= DSGUID	This parameter allows envelopes to be created based on a DocuSign Template ID. The DocuSign template defines the documents, recipient roles and signer types for the envelope. If this option is used, the **Custom Contact Role Map** option should be used to correctly line up the roles. If no value is supplied, the standard document selections apply.

Related Content

Parameter Values	Notes
RC= GetRelContentIDs (“{SFObject.Id}”)	The Related Content related list must be added to an object layout to use this parameter. This parameter is designed to pull documents from Salesforce Content that are in the Related Content related list for the specified object and add them to the envelope. It does not pull documents from the Notes & Attachments related list. **Example**: GetRelContentIDs(“{!Account.Id}”) If no value is supplied, the standard document selections apply.

Load Attachments

Parameter Values	Notes
LA= • 1 (ON) • 0 (OFF) • Not supplied	When ON, all items in Attachments are added to the envelope. This parameter is typically used with the DocuSign Template option, since the documents are supplied by the template. If no value is supplied, this parameter defaults to ON.

Sample JavaScript Code for Custom Buttons

Use this sample code as a starting point when adding your information. To use the sample code, just copy it into a text editor, set the parameters you want use (you can delete or comment out the others) and copy the code to the code section of the New Button or Link page when creating the button.

IMPORTANT: The sample code has hard returns added so the text is easier to read. If you copy and paste this sample, you will need to remove the returns in order for it to function correctly.

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}
```

```
//********* Option Declarations (Do not modify )*********//
var RC = '';var RSL='';var RSRO='';var RROS='';var CCRM='';var CCTM='';var
CCNM='';var CRCL=''; var CRL='';var OCO='';var DST='';var LA='';var
CEM='';var CES='';var STB='';var SSB='';var SES='';var SEM='';var
SRS='';var SCS ='';var RES='';
//*************************************************//

// Modify individual options here:


// Related Content (default no related content)
RC = ''; //Ex: GetRelContentIDs("{!Opportunity.Id}");
// Recipient Signer Limit (default no limit)
RSL = ''; //Ex: '3'
// Recipient Starting Routing Order (default 1)
RSRO = '';  // Ex: '1'
// Recipient Routing Order Sequential (default not sequential)
RROS = ''; //Ex: '1'
// Custom Contact Role Map (default config role)
CCRM = ''; //Ex: 'Decision Maker~Signer1;Economic Buyer~Carbon Copy'
// Custom Contact Type Map (default Signer)
CCTM = ''; //Ex: 'Decision Maker~Signer;Economic Buyer~CC'
// Custom Contact Note Map (default no note)
CCNM = ''; //Ex: 'Decision Maker~Note for DM;Economic Buyer~Note For
EB;DEFAULT_NOTE~Default Note'
// Custom Related Contact List (default object contact)
CRCL = ''; //Ex: 'MyContacts__r,Email~Email__c;FirstName~First_Name__
c;LastName~Last_Name__c;Role~Role__c,LoadDefaultContacts~0'
// Custom Recipient List
CRL = ''; //Ex:
'Email~;FirstName~;LastName~;Role~SignInPersonName~;RoutingOrder~;AccessCod
e~;RecipientNote~;SignNow~, LoadDefaultContacts~1'
// One Click Option (default edit envelope screen)
OCO = ''; //Ex: Tag
// DocuSign Template ID (default no template)
DST = ''; //Ex: '67870A79-A0B5-4596-8AC1-CC7CC1EA01EB'
// Load Attachments (default on)
LA = ''; //Ex: '0'
// Custom Email Message (default in config)
CEM = ''; //Ex: 'Envelope sent by [FirstName] [LastName] ([Email])!'
// Custom Email Subject (default in config)
CES = ''; //Ex: 'Re: Opportunity Name: {!Opportunity.Name}'
// Show Tag Button (default in config)
STB = ''; //Ex: '1'
// Show Send Button (default in config)
SSB = ''; //Ex: '1'
// Show Email Subject (default in config)
```

```
SES = ''; //Ex: '1'
// Show Email Message (default in config)
SEM = ''; //Ex: '1'
// Show Reminder/Expire (default in config)
SRS = ''; //Ex: '1'
// Show Chatter (default in config)
SCS = ''; //Ex: '1'
// Reminder and Expiration Settings
RES = ''; //Ex: '0,1,2,0,120,3'

//********* Page Callout (Do not modify) *********//
window.location.href =
"/apex/dsfs__DocuSign_CreateEnvelope?DSEID=0
&SourceID={!Opportunity.Id}
&RC="+RC+"&RSL="+RSL+"&RSRO="+RSRO+"&RROS="+RROS+"
&CCRM="+CCRM+"&CCTM="+CCTM+"&CRCL="+CRCL+"&CRL="+CRL+"&OCO="+OCO+"
&DST="+DST+"&CCNM="+CCNM+"&LA="+LA+"&CEM="+CEM+"&CES="+CES+"
&SRS="+SRS+"&STB="+STB+"&SSB="+SSB+"&SES="+SES+"&SEM="+SEM+"
&SRS="+SRS+"&SCS="+SCS+"&RES="+RES;
//*******************************************//
```

Create Custom Buttons

This procedure explains how create a custom DocuSign button for use in Salesforce tabs. If you have questions about customizing Salesforce, see the salesforce.com documentation for assistance.

1. From Salesforce.com, click **Setup** to go to the Force.com Home page.
2. In the left sidebar under Build, click **Customize** to expand the list.
3. Find the Salesforce tab for the custom button and click the tab name (for example: Opportunities) to expand the list below it.
4. In the tab list, click **Buttons and Links**.
5. In the Buttons and Links section, click **New Button or Link**.
   The New Button or Link page appears.
6. Add the button **Label** and **Name** and set the following attributes:
   - Display Type: select **Detail Page Button**.
   - Behavior: select **Execute JavaScript**.
   - Content Source: verify that **OnClick JavaScript** is selected (if not, select it).
7. In the Code section, add the button configuration information. DocuSign recommends that you use the Sample Custom Button JavaScript Code when adding your information.

8. Click **Save**.
   The new custom button is added to the list of Custom Buttons and Links for the Salesforce tab and can be added to the page layout for the tab.

In Person Signing Custom Buttons

This section provides some example scripts for creating custom buttons to host In Person Signing sessions. For complete instructions for creating and placing custom buttons, refer to Custom Buttons and the salesforce.com web site.

To create an "I want to host an In Person Signing session" button

The following script can be used for a button that allows the current Salesforce user to host an in person signing session when the button is clicked and has a custom object that defines the signer. This script has the following requirements:

- The custom object email must be the Salesforce user's email address.
- The custom object first and last names must be the Salesforce user's first and last names.
- The custom object's Role must map to 'Sign in person'. In the example below, the role must be 'InPerson'

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}

var rc = GetRelContentIDs("{!Opportunity.Id}");

var CCTM = 'Decision Maker~Signer;Executive
Sponsor~Signer;CarbonCopy~Carbon copy;InPerson~Sign in person';

var CRCL='MyCustomObjects__r,Email~Email__c;Role~Role__
c;FirstName~FirstName__c;LastName~LastName__c;RoutingOrder~RoutingOrder__
c;SignInPersonName~SignInPersonName__c,LoadDefaultContacts~1';

window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&SourceID={!Opportunity.Id}
&rc="+rc+"&CCTM="+CCTM+"&CRCL="+CRCL;
```

Alternately, you can hard code the InPerson signer name into your button. The following script allows the current Salesforce user to host Dan Smith as an in person signer when the button is clicked:

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}

var rc = GetRelContentIDs("{!Opportunity.Id}");
```

```
var CCTM = 'Decision Maker~Signer;Executive Sponsor~Sign In Person';

var CRL='Email~{!User.Email};Role~Executive Sponsor;FirstName~
{!User.FirstName};LastName~{!User.LastName};SignInPersonName~Dan
Smith;SignNow~1';

window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&SourceID={!Opportunity.Id}
&rc="+rc+"&CCTM="+CCTM+"&CRL="+CRL;
```

Note: In the above example, the signing process starts as soon as the button is clicked because the script includes **SignNow~1**. If this parameter is not included in the script, the user waits for an email to start the signing process.

Sign Now Custom Buttons

This section provides an example script for a custom button to let a user sign documents now. For complete instructions for creating and placing custom buttons, refer to Custom Buttons and the salesforce.com web site.

To create an "I want to sign my documents now" button

The following script can be used for a button that lets the current Salesforce user start a signing session with the user as the signer:

```
{!REQUIRESCRIPT("/apex/dsfs__DocuSign_JavaScript")}

var rc = GetRelContentIDs("{!Opportunity.Id}");

var CCTM = 'Decision Maker~Signer';

var CRL='Email~{!User.Email};Role~Decision Maker;FirstName~
{!User.FirstName};LastName~{!User.LastName};SignNow~1';

window.location.href = "/apex/dsfs__DocuSign_
CreateEnvelope?DSEID=0&SourceID={!Opportunity.Id}
&rc="+rc+"&CCTM="+CCTM+"&CRL="+CRL;
```

Merge Fields

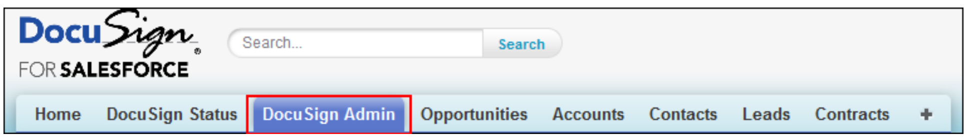
Merge fields are DocuSign custom tags that are integrated with Salesforce objects. When a custom tag with merge field settings is added to a document, the Salesforce data is imported into the tag. In addition to pulling data from Salesforce, merge fields can update data in Salesforce when the information is changed by a signer (this only happens if the Writeback option is enabled for the Merge Field).

- Create Merge Fields
- Edit Merge Fields
- Add Custom Tags with Merge Field Settings

Create Merge Fields

Note: In order for the merge fields feature to work correctly, merge fields must be enabled for your account and DocuSign Connect for Salesforce must be configured and enabled.

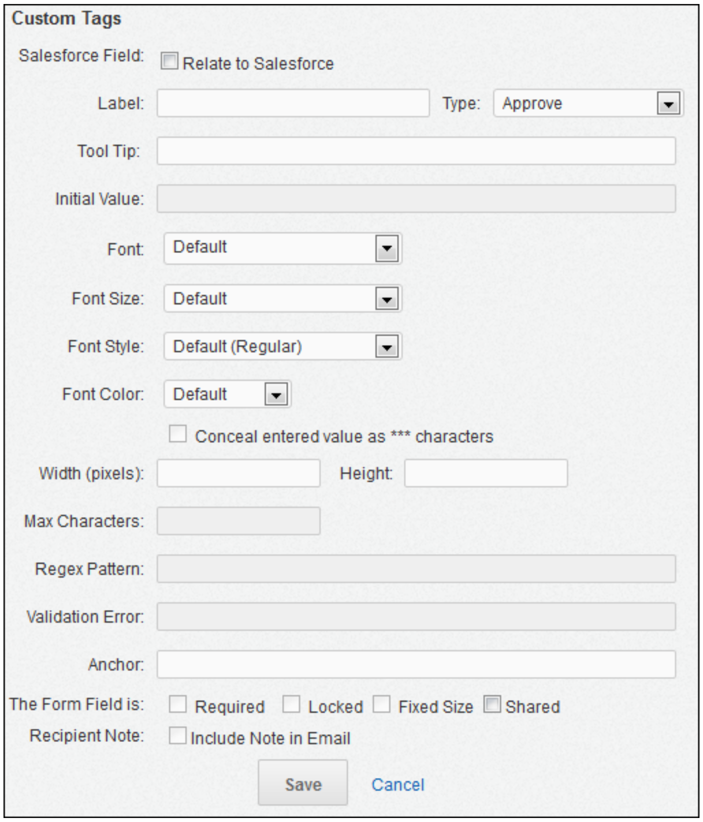
1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.



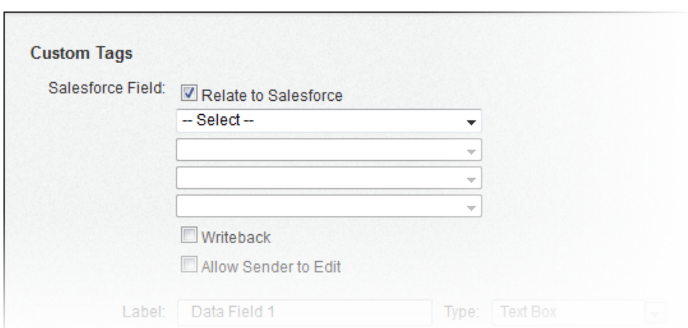
3. Click the **DocuSign** tab. The DocuSign web application opens in a new browser window.

   Note: You might be asked to log in to DocuSign. If you are asked to log in, you can try closing the new browser window, refresh the DocuSign Admin tab window and then try clicking the DocuSign tab again.

4. From the DocuSign application, click your profile image at the top of the application and select **Preferences**.
   The DocuSign Account Preferences page is displayed.
5. In the Navigation Panel on the left side, under the Member Options section, click **Custom Tags**. The list of your Merge Fields, custom tags and shared custom tags is shown.
6. Click **Add**. The Custom Tags page appears.



7. Select the **Relate to Salesforce** check box. The Salesforce Object lists appear below the check box.



- In the top list, select the Salesforce Object (Opportunity, Case, Account, etc.) that documents will be sent from and then select the field associated with the tag.

  If the selected field is a Salesforce Lookup Field type, shown with the word reference or child relationship in parenthesis after the field title, continue to use the lists below the Lookup Field to select the final field to associate with the tag.

- Select the Writeback check box to automatically update the Salesforce data when the data is changed by a signer.

> **Note:** If Writeback is selected for an email field, the signer that changed the value must complete the normal email change confirmation process to update the Salesforce value.

- Select the **Allow Sender to Edit** checkbox to let senders modify the value of the custom tag when the tag is added to a document during the sending process.

> **Note:** If **Allow Sender to Edit** is selected, the sender can only modify the value for the tag they have placed on their document. The value of the saved custom tag is not changed.

8. Type a name for the custom tag in the **Label** field and review the tag **Type**. The **Type** field is set to the type of Salesforce field selected, but can be changed.

> **Note: Label** and **Type** are the only required fields for a custom tag. All other fields are optional and the available fields can change, depending on the type of tag selected.

The **Label** is a unique identifier for the tag that is only seen by the sender. Tags that share the same label will share the same data when entered by a recipient (for example: if you add two data field tags with the labels Address 1, when a recipient types data into the first data field tag, the information is automatically copied into the second tag).

The **Type** list sets the type of information entered in the field. Select a type that closely matches the information in the selected Salesforce field.

> **Note**: Radio Button tags are not supported with the Merge Fields feature. You can use any other type of DocuSign tag.

The selected tag type can change the active fields for the custom tag. For example, when a Check Box tag type is selected, the Initial Value, Conceal entered value, Width, Regex Pattern and Validation Error fields are inactive; while selecting a Drop Down List type adds the Items field and the Conceal entered value, Regex Pattern and Validation Error fields are inactive.

9. Optionally, type the **Tool Tip** for the tag. The tool tip is text the recipient sees when they position their cursor over the tag when signing a document.

10. The other fields that are active in the window depend on the Type selected. These fields have the same properties as standard DocuSign tags. General information about these fields follows:

> **Note:** DocuSign recommends that you add a message in the **Initial Value** for the tag. This way senders can easily determine if there connection problem between Salesforce and DocuSign. For example: If you type "NO VALUE" in the Initial Value for the tag, when the tag is placed in a document "NO VALUE" is displayed in the tag until the DocuSign system is able to pull the data from Salesforce. If the information does not change, there is a connect problem.

- Text Styles: These options are used to set the **Font**, **Font Size**, **Font Style** and **Font Color** for the text in this tag. This allows you to match the text formatting in your documents.
- If the **Conceal entered value as *** characters** option is active, you can choose to conceal (hide) the information a recipient types into the tag. The information appears normally while the recipient is adding or modifying the information, but the data is not visible to any other signer or the sender. See Collecting Envelope Form Data in the *DocuSign Service User Guide* for information on how to view and download the concealed tag data. The figure below shows how a concealed tag appears after information is entered into the tag.

- If the **Regex Pattern** field is active, you can use Regular Expressions syntax to format a custom text mask. The custom mask checks the information a recipient types in the field and, if the information does not follow the format, displays the message entered in the **Validation Error** field. For more information on how to build a regular expression, we recommend the following resources:
  Regular-Expressions.info — http://www.regular-expressions.info/
  Wikipedia — http://en.wikipedia.org/wiki/Regular_expression
  RegExLib.com — http://regexlib.com/
- If the **Validation Error** field is active, type a short message that appears when a recipient incorrectly completes the tag, based on the format of the **Regex Pattern** field.
- Using the **Anchor** field you can anchor the custom tag to a word or series of words in a document. Type a word or words in the **Anchor** field. The tag is attached to all occurrences of the words in the documents in an envelope. Note that the word(s) typed in the **Anchor** field are case sensitive. See Use Automatic Anchor Tags with Custom Fields for information about anchoring a custom tag

- **Required** option: You can choose to make the tag required or optional for the recipient.
- **Locked** option: If you provide information for a tag, you can choose to lock the tag, so that the information cannot be changed, or make it editable by the recipient. The default is editable (not-locked).
- **Fixed Length** option: This sets the maximum number of characters for the tag.
- **Shared** option: Select to allow other users to use this custom tag.
- **Include Note in Email** option: If the tag Type is **Note**, select this option to have the note appear in the email sent to the recipient.

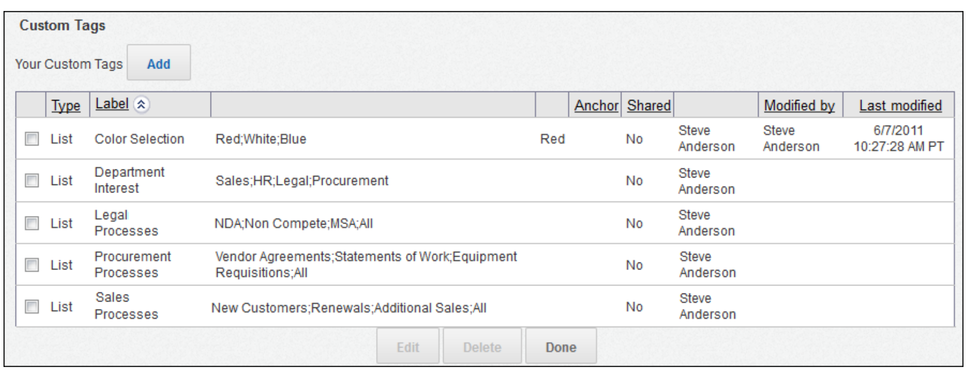
11. Click **Save** to save the custom tag. The custom tag is ready for use as a Merge Field.

    If the **Shared** option is selected, other users in your Salesforce account can use the custom tag when sending documents with DocuSign.

Edit Merge Field Settings

You can edit the merge field settings for a custom tag from the DocuSign application Preferences section or from the Custom tag palette while adding tags to a document.

1. Go to the list of custom tags:
   - From the **DocuSign Admin** tab, click the **DocuSign** tab. From the DocuSign web application, click the Account Select list and select **Preferences**. In the Navigation Panel on the left side, under the Member Options section, click **Custom Tags**. The list of your custom tags and shared custom tags is shown.
   - If you are adding tags, click on the **Custom** tag palette and click **Edit**. The list of your custom tags and shared custom tags is shown.



Custom Tags

Your Custom Tags Add

	Type	Label			Anchor	Shared		Modified by	Last modified
☐	List	Color Selection	Red;White;Blue	Red		No	Steve Anderson	Steve Anderson	6/7/2011 10:27:28 AM PT
☐	List	Department Interest	Sales;HR;Legal;Procurement			No	Steve Anderson		
☐	List	Legal Processes	NDA;Non Compete;MSA;All			No	Steve Anderson		
☐	List	Procurement Processes	Vendor Agreements;Statements of Work;Equipment Requisitions;All			No	Steve Anderson		
☐	List	Sales Processes	New Customers;Renewals;Additional Sales;All			No	Steve Anderson		

Edit Delete Done

2. To edit the custom tag, select the check box adjacent to the tag with the merge field information you want to edit and click **Edit** at the bottom of the list. The Custom Tags page

for the selected custom tag appears.

Make the changes to the custom tag as needed. Making changes to custom tag is similar to creating a new custom tag. Refer to steps 6 – 10 of the Create Merge Fields procedure for more information.

When you have made all of the changes, click **Save** to save the modified custom tag and return to the list of custom tags

3. To delete a custom tag, select the check box adjacent to the field you want to delete and click **Delete** at the bottom of the list.

> **Note:** If you are not a Customer Account Manager, you can only delete your custom tags. A Customer Account Manager can delete shared custom tags.

The selected custom tags are removed from the list.

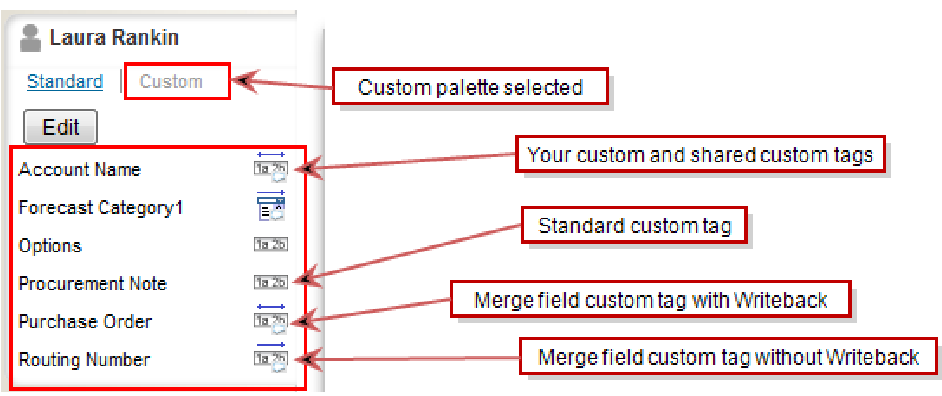
4. When you are finished editing or deleting Merge Fields, click **Done**.

Add Custom Tags with Merge Field Settings

The procedure for adding a custom tag with merge field settings to your document is similar to adding a standard DocuSign tag.

1. Start an envelope normally. When you are ready to add a custom tag, select the recipient for the tag, click on the **Custom** tag palette, your custom tags and any shared custom tags are shown in the tag palette.

> **Note:** The envelope must be started from Salesforce or associated with the Salesforce object in the Envelope Settings for the merge field information to transfer into the tag.



2. Find the custom tag you want to add to the document, then click and drag the tag onto the document and drop it.

Custom tags with merge field are differentiated from standard custom tags by icons with a small cloud and a double-headed arrow (showing **Writeback** is enabled, so data is pulled from Salesforce and updates are sent back to Salesforce) or a single-headed arrow (showing **Writeback** is not enabled, so data is only pulled from Salesforce).

3. If the merge field settings for the custom tag pull information from a list in Salesforce; the first time the tag is placed on the document, the first value in the list is displayed and each subsequent time the tag is placed on the document the next value from this list is displayed.

> **Example:** You have a custom tag with merge field settings that point to a price field for an Opportunity with a list of product prices. The values in the list of product prices are $100, $150, and $200. The first time the custom tag is placed on a document, it displays $100. The second time the tag is placed it displays $150 and a third tag displays $200.

4. Finish adding any other tags and send the envelope normally.

Automatic Anchor Text and Tags

Automatic anchor text is a feature that allows text to be used in documents as a placeholder for signature, initial and other tags for particular Salesforce Role Names. You can manually place the text into your documents and then set the roles for recipients when adding the recipients to an envelope. When you send the document using DocuSign for Salesforce, the appropriate DocuSign tags for the selected role are placed in the automatic anchor text locations.

By default, your DocuSign for Salesforce installation supports standard automatic anchor text for up to four recipients (Role Names Signer 1-4, as defined in the DocuSign Admin - Recipient Role Settings). You can extend the standard anchor text feature to support additional recipients and Salesforce merge field settings using custom tags.

Topics in this guide include:

- Automatic Anchor Tags and Recipient Signer Roles
- Place Automatic Anchor Text in a Document
- Use Automatic Anchor Text with Custom Tags
- Send Documents with Anchor Text

Automatic Anchor Tags and Recipient Signer Roles

The following table shows the default automatic anchor text used for different DocuSign tags, based on the Role assigned to a signer in Salesforce. This is the text typed in documents when creating and saving the documents.

	Salesforce Role Names and Anchor Text			
Tag Type	Signer 1	Signer 2	Signer 3	Signer 4
Signature	\s1\	\s2\	\s3\	\s4\
Initial	\i1\	\i2\	\i3\	\i4\
Optional Initial	\oi1\	\oi2\	\oi3\	\oi4\
Name	\n1\	\n2\	\n3\	\n4\
Company	\co1\	\co2\	\co3\	\co4\
Title	\t1\	\t2\	\t3\	\t4\
Date Signed	\d1\	\d2\	\d3\	\d4\

For example, to add:

- A Signature tag for Salesforce Role Name Signer 2, you would type `\s2\` in the document.
- A Company tag for Salesforce Role Name Signer 3, you would type: `\co3\`in the document.
- A Title tag for Salesforce Role Name Signer 1, you would type: `\t1\` in the document

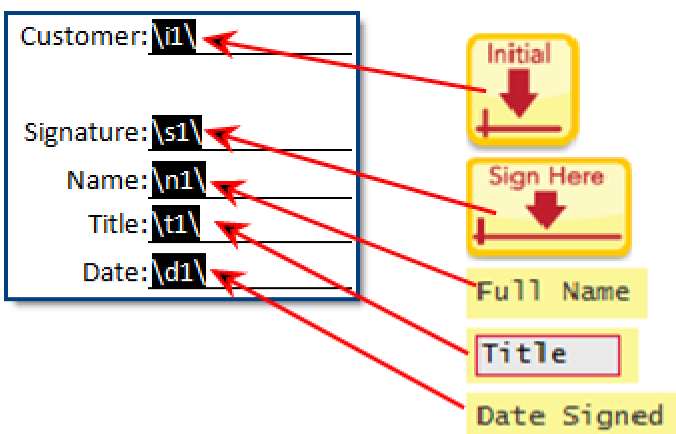
Note: The previous table shows the default Role Names in the DocuSign Admin – Settings tab. If the Salesforce Role Names are modified, the associated information in the table will change.

Place Automatic Anchor Text in a Document

When creating or editing a document, type the automatic anchor text in the appropriate location in the document.

- After typing the anchor text, change the color of the anchor text to white or to the background color of the document. This way the anchor text does not appear when the document viewed, making the anchor text invisible to the recipients of the document.

  In the example below, anchor text is added to place an initial, signature, name, title and date signed tags. The text has been highlighted so it can be viewed.



IMPORTANT: You MUST NOT use the automatic anchor text in ANY other location in the document, unless you want DocuSign to add the tags to the text location.

Use Automatic Anchor Text with Custom Tags

In addition to standard Automatic Anchor Tags, you can use automatic anchor text to place DocuSign custom tags, including those with merge field settings, in documents. This is done by using a special macro sequence when defining the custom tag.

1. Create a new custom tag.

   For information about creating custom tags, see the *Creating Custom Tags* Quick Start Guide or *DocuSign Service User Guide*.

   For information about creating a custom tag with merge field settings, see the Merge Fields section of this guide.

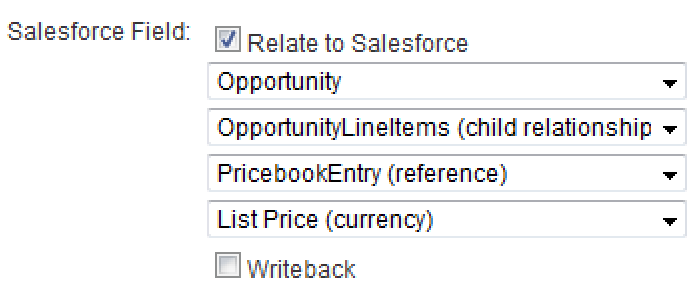
2. In the **Anchor** field for the custom tag, type anchor text for the tag. The anchor text must include the string **{r}**. The **{r}** will represent the numbered position in the Salesforce Role Name list when the anchor text string is added to a document and the {r} is replaced with the appropriate number in the document.

   Example Custom Tag Anchor Text:

Custom Tag Type	Anchor field text is …	Document Anchor Text for Role Name 1	Document Anchor Text for Role Name 2
Text	\tbx_{r}_text\	\tbx_1_text\	\tbx_2_text\
Check Box	\cb_{r}_yes\	\cb_1_yes\	\cb_2_yes\

   This feature also supports the use of Salesforce related lists as returned by merge field settings. In this case, the anchor text typed in the **Anchor** field uses the format **{r,startRow-endRow}**.

   Example Related List:

<table>
<tr><th>Custom Tag Type</th><th>Anchor field text is …</th><th>Document Anchor Text for Role Name 1</th></tr>
<tr><td>Text
The merge field settings are:

</td><td>\listprice {r,1-5}\</td><td>\listprice1_1\
\listprice1_2\
\listprice1_3\
\listprice1_4\
\listprice1_5\</td></tr>
</table>

   If the custom tag is created with the merge field settings as shown above and the five anchor text entries are typed into the document, then five Text tags are automatically placed with the anchor text when the document is sent from the Opportunity with DocuSign for Salesforce. The values in the Text tags are the first five values of the Price Book entry list price for this Opportunity.

> **Note:** Tags are still placed on the document even if the merge field definition is not provided. This allows multiple unique tabs to be created from a single merge field definition.

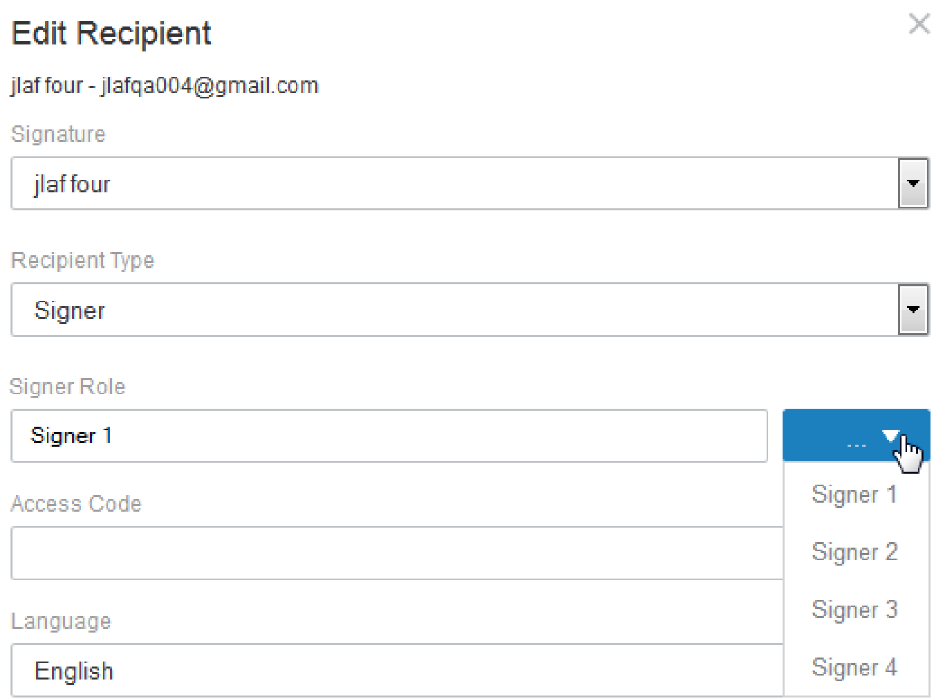
3. To allow others in your organization to use the new custom tag, including your Salesforce1 mobile app users, in the Form Field settings, select **Shared**.
4. Click **Save** to save the custom tag.

   When creating or editing a document that will use the automatic anchor text for custom tags, type the automatic anchor text in the appropriate location in the document as described in the topic Place Automatic Anchor Text in a Document.

Send Documents with Anchor Text

A document with automatic anchor text is sent in the same manner as a normal document, with the following changes:

1. Add the document with the anchor text to the envelope.
2. When adding or editing the recipients, use the **Signer Role** list to select the Role Name for the recipient. This selection tells DocuSign which person to assign the automatic anchor tags.



Click **Save Recipient** to add or edit the recipient.

3. Finish preparing your envelope.
4. Click **Send Now**. Alternately, you can click **Next** to place additional tags and review the placement of tags on the documents.

   DocuSign for Salesforce places the appropriate tags in the document on the anchor text locations for the selected Signer Role for each recipient and sends the envelope.
5. You have successfully sent a document for signing from DocuSign for Salesforce.

   When the recipient receives the document they see the signature, initial and other tabs showing where and how to sign the document.

Refer to the *DocuSign for Salesforce User Guide* for a more information about sending documents with DocuSign for Salesforce.

Send of Behalf of for Salesforce

In some cases, a DocuSign for Salesforce user accesses DocuSign through Salesforce, with the DocuSign user name and password for the user being stored within Salesforce. A user can also access the DocuSign application directly and if the user changes their DocuSign password without updating it in Salesforce, the link between DocuSign and Salesforce for that user might be broken.

The Send On Behalf Of feature enables one account member to become the System Sender for all the senders associated with this DocuSign for Salesforce account. When users try to access DocuSign through DocuSign for Salesforce, the credentials of the System Sender are used for access, but the user's information is used for all other cases. This simplifies the access process with no visual differences for the end users.

For example, if DocuSign for Salesforce user Joe Smith is part of an account that has the Send On Behalf Of feature active, envelopes sent by Joe still appear as if they are sent by Joe Smith and connections between Joe's DocuSign for Salesforce account and DocuSign will not break if Joe changes his password in the DocuSign web application.

Note: This feature is enabled by default for new DocuSign for Salesforce installations with the Salesforce User used during installation as the System Sender. Previously installed DocuSign for Salesforce accounts might need to enable this feature by going to the DocuSign web application Preferences section, selecting the Permissions page for the user that will be the System Sender and selecting the **Account Wide-Rights** and **Send On Behalf Of Rights (API)** options. Contact DocuSign Support for any questions or other problems.

Enable or Disable Send on Behalf of for Salesforce

Send On Behalf Of for Salesforce is enabled or disabled in the DocuSignAccountConfigurations object.

To enable or disable Send on Behalf Of

1. Go to the DocuSignAccountConfigurations object in Salesforce.
2. Select or clear the **Use Send On Behalf Of** check box and save the object.
3. If you enabled the feature, and you need to update the DocuSign System Sender user name or password, follow the steps in Managing DocuSign Account Settings.

Note: The DocuSign System Sender must have the **Account Wide-Rights** and **Send On Behalf Of Rights (API)** options enabled in DocuSign Permissions settings. This is found by going to to the DocuSign web application Preferences section, selecting the Permissions page for the user that will be the System Sender and selecting the **Account Wide-Rights** and **Send On Behalf Of Rights (API)** options. Contact DocuSign Support for any questions or other problems.

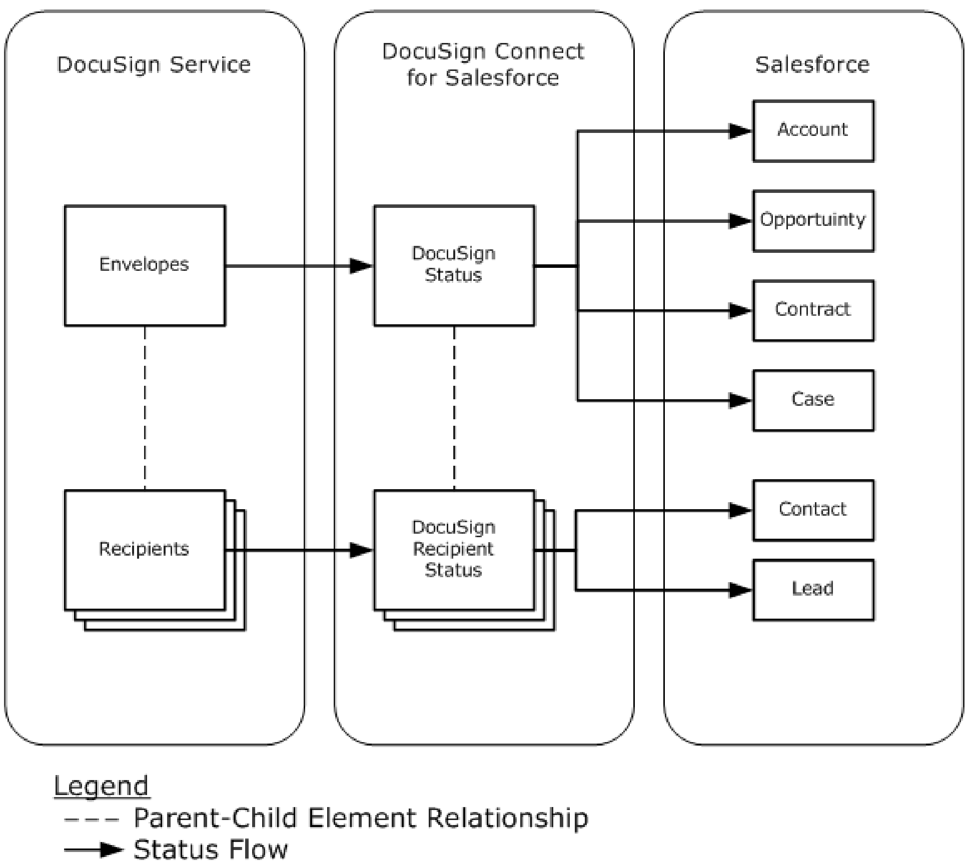
DocuSign Connect for Salesforce

DocuSign Connect for Salesforce sets up a connection between your Salesforce account and DocuSign, so that changes in DocuSign envelope and recipient status are updated in your Salesforce account. Whenever selected events occur for an envelope, DocuSign connects to Salesforce (using credentials that you provide) and updates a status record.

In the default DocuSign for Salesforce installation, DocuSign adds two custom objects that update envelope status and recipient status in Salesforce.

You can also customize DocuSign Connect for Salesforce by associating DocuSign objects with Salesforce objects, so that DocuSign Connect for Salesforce updates or inserts the information in to the Salesforce object.

Data Mapping Schematic for DocuSign Connect and Salesforce



Real Time Data and Updates in Salesforce

With DocuSign Connect for Salesforce set up, you will see the updates in Salesforce about 20-30 seconds after the data changes or an event occurs in the DocuSign service.

If you are changing your DocuSign Connect for Salesforce settings by adding Connect Objects, you might want to test the configuration using a DocuSign DEMO account since it points to the Salesforce 'sandbox' accounts and won't affect your production account.

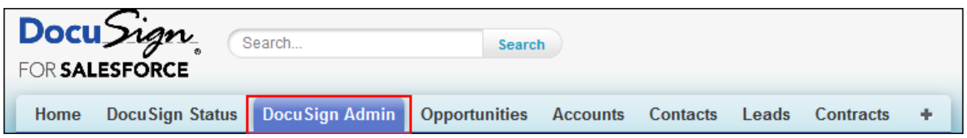
DocuSign Connect for Salesforce Settings

When DocuSign for Salesforce is installed, DocuSign Connect for Salesforce is set up for your system and two Connect Objects, one that updates envelope status and documents and one that updates recipient status, are added.

Change DocuSign Connect for Salesforce Settings

> **Note:** DocuSign recommends that you download the DocuSign Connect for Salesforce configuration xml file before making changes to your settings. This way it is easy to restore your current settings if there is an issue with any changes you make. See Download and Upload DocuSign Connect for Salesforce Settings for more information.

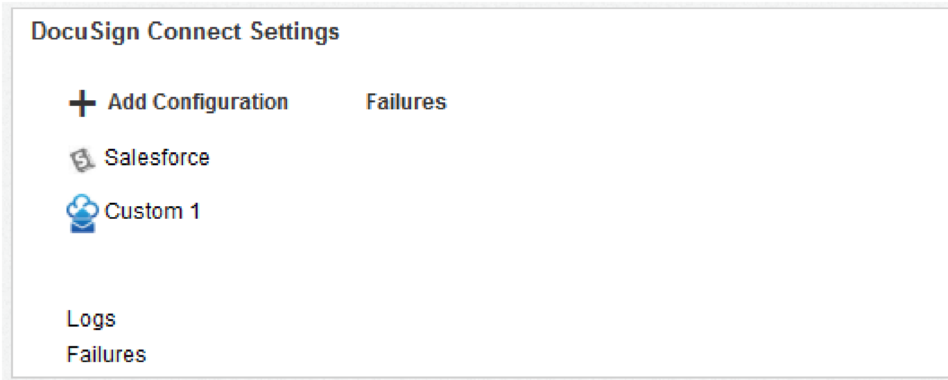
1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.



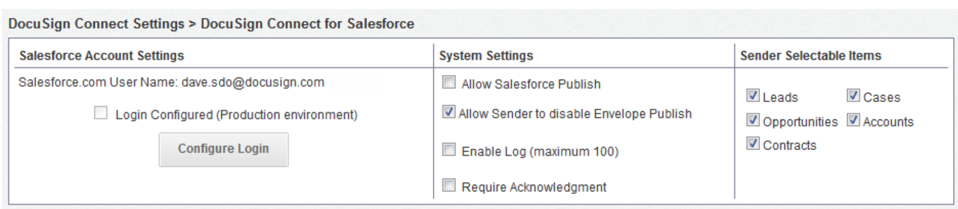
3. Click the **DocuSign** tab.

   > **Note**: You might be asked to log in to DocuSign.

   DocuSign opens in a new browser window.
4. From DocuSign, click your profile image at the top of the application and select **Preferences**.
   The DocuSign Account Preferences page is displayed.
5. In the navigation bar on the left side of the page, under the Account Administration heading, click **Connect**. The DocuSign Connect Settings page appears. The page has a list of existing Connect configurations and allows you to access the Connect logs and failures pages.



6. Click **Salesforce** to add the DocuSign Connect for Salesforce configuration. The configuration page appears.
7. Review the DocuSign Connect for Salesforce setting in the upper portion of the page and change them as needed.



a. **Salesforce Account Settings**: During the installation, the connect settings are configured for your account. If you want to change your Salesforce Account Settings, see the Change DocuSign Connect for Salesforce Account Settings procedure.

b. **System Settings**: This section sets the general system Connect settings. The settings are described below:

- **Allow Salesforce Publish**: This option is selected by default. When this option is selected, data is sent to the designated Salesforce account. Clear this option to stop sending data while maintaining the custom information.
- **Allow Sender to disable Envelope Publish**: This option allows a sender to disable sending data for the current envelope. This setting is not selected by default.
- **Enable Log**: Select this option to enable logging for this connection. It is recommended that you enable this option to facilitate troubleshooting any problems. If you do not want to enable logging for this connection, clear this box. You can have a maximum of 100 active logs for your account. The entries

in active logs can be viewed by clicking the **Logs** tab. This setting is not selected by default.

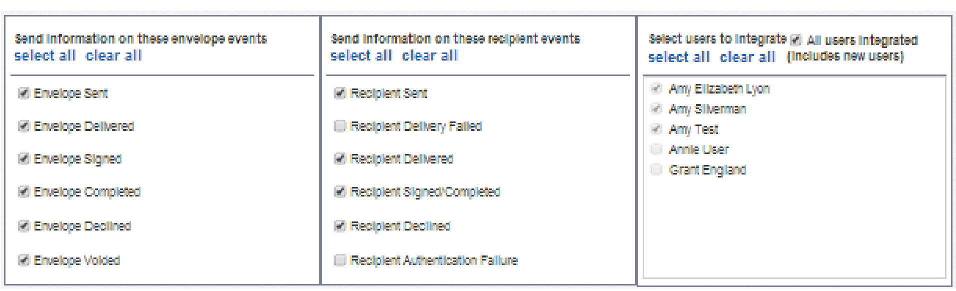
- **Require Acknowledgment:** Select this option to log posting failures. The acknowledgment failure messages are logged in the Failures tab. This setting is not selected by default.

  When the **Require Acknowledgment:** option is selected, DocuSign waits 100 seconds for an acknowledgment from Salesforce before recording a failure. If a publication message fails to be acknowledged, the message goes back into the queue and the system will retry delivery after a successful acknowledgment is received. If the delivery fails a second time, the message is not returned to the queue for sending until Connect receives a successful acknowledgment and it has been at least 24 hours since the previous retry. There is a maximum of ten retries.

  You can view the list of Connect publish failures by going to the **Failures** tab and you can manually republish these items from the **Failures** tab.

- **Sender Selectable Items:** This section sets the items available for selection when adding or editing Connect Objects.

8. Select Events and Users to track. Select the events you wish to use as triggers for status updates. These events include envelope status events as well as recipient activity events. Descriptions for these events are available from this help topic.



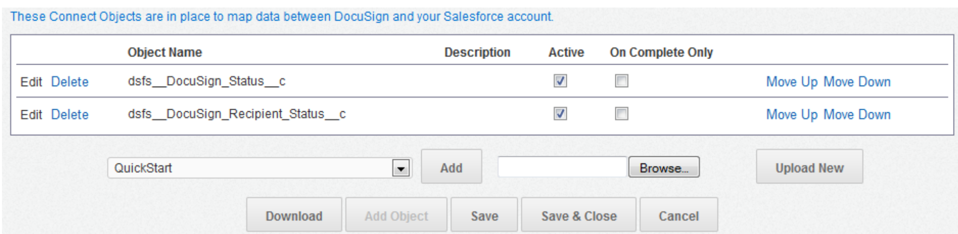
a. You can select any number of events. Updates to the same envelope will change the status or information as the transaction progresses, so if you choose to get updates for sent, delivered, signed, and you have multiple signers, data fields mapped to Salesforce will be updated as the transaction progresses.

> **Note**: In cases where multiple events for a single envelope or recipient are queued, only the most recent change is published.
> Example: For an envelope with one signer, when the signer finishes signing the envelope an Envelope Signed event is triggered, then the DocuSign system processes

the envelope, and an Envelope Completed event is triggered. If both of these events are in the Connect queue at the same time, only the Envelope Completed event is sent.

b. You can select the users in your account that trigger events. If users are not selected, their transactions will not generate update events into Salesforce. You can select **All users integrated**, which selects all the current users and adds new users when they are added to the account (**All users integrated** is not selected when initially setting up Connect).

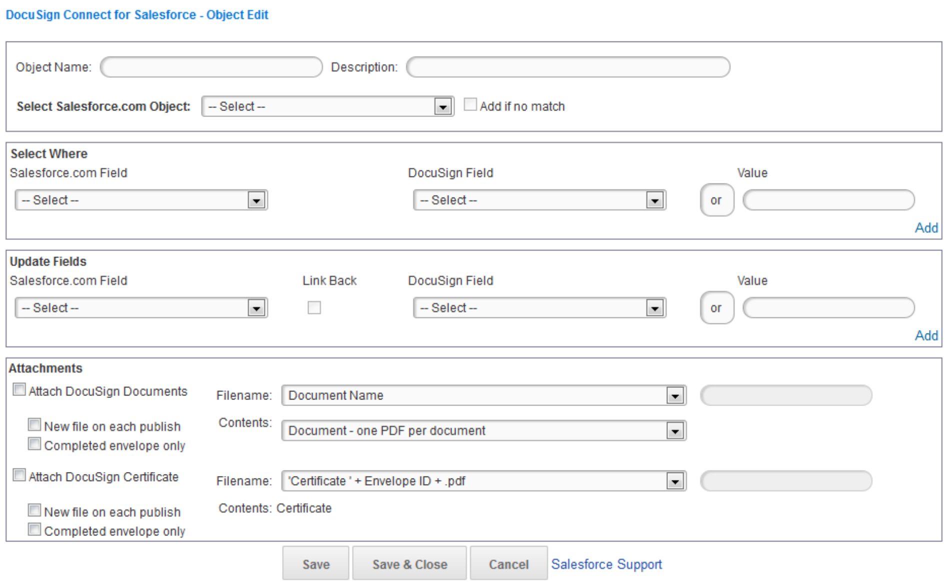
9. To edit, add, delete or change the order of Connect Objects. The current list of Connect Objects is shown at the bottom of the page. These objects are used to map data between DocuSign and your Salesforce account.



a. **To change the order of Connect Objects:** Use the **Move Up** or **Move Down** links to change the order in which the Connect Objects are resolved. DocuSign Connect for Salesforce completes updates for the Connect Object from the top of the list to the bottom of the list. It is important to have your objects arranged in the correct to ensure information is updated in the correct order.

b. **To edit an object:** Click the **Edit** link adjacent to the object you want to edit. The DocuSign for Salesforce Object Edit page for the object is displayed. Follow the procedure for adding a new object to edit the object.

c. **To add a new object:** Click **Add Object**, the DocuSign for Salesforce Object Edit page is displayed:



d. Type the **Object Name** and **Description** for the new object. These are reminders for you about the function of this Connect Object, but do not affect the object.

e. Use the **Select the Salesforce.com Object** list to select the Salesforce object for data mapping. This auto-populates data from your Salesforce account into the Salesforce.com Field lists used to configure the object.

f. Select the **Add if no match** checkbox to create a new record if a match is not found in Salesforce.

g. In the Select Where section, select the Salesforce and DocuSign fields that are used to match a Salesforce object with DocuSign information so that the system knows when to send updates to Salesforce.

   Example: If the selected fields to match are Envelope ID, so the first time an envelope is sent DocuSign a new envelope record is created (since Envelope IDs are unique). For subsequent changes, the Envelope ID will match the envelope record and updates for that envelope are sent to Salesforce.

> **Note**: It is possible to have multiple rows of Select Where items. This allows an update to happen only if multiple conditions are true such as a match on company name and contract type or some other value you track. These are AND functions, so if they are not all true, the update will not happen.
> To add another Select Where row; select you first match criteria, click **Save** at the bottom of the page, click the **Add** link in the Select Where section and then select the other match criteria.

h. The Update Fields section is used to select the fields updated in Salesforce and the corresponding DocuSign field used to update it.

- If you select Recipient Secure Field as the DocuSign Field, a new field appears adjacent to the list. Type the **Label** of the DocuSign custom tag (SecureField) used to capture information during the signing process.
- The **Link Back** option provides a URL that links to the information in the DocuSign field. This option is not available for all Salesforce.com field types.

i. To add another Update Fields row, click **Save** at the bottom of the page, click the **Add** link in the Update Fields section and then select the Salesforce and DocuSign fields.

> **Note**: If a Salesforce object has required fields and a new record is being created, all of these fields must be populated or the object will not be added.

j. Select any **Attachments** that are sent to Salesforce and when the attachments are sent.

k. Click **Save & Close** to save the object and return to the DocuSign Connect for Salesforce page.

10. After making the needed changes to your DocuSign Connect for Salesforce setting, click **Save** or **Save & Close** to save the changes.

After verifying that the DocuSign Connect for Salesforce settings function correctly, DocuSign recommends that you download the DocuSign Connect for Salesforce configuration xml file as a backup for your settings. This way it is easy to restore your settings. See Download and Upload DocuSign Connect for Salesforce Settings for more information.

Envelope and Recipient Events Reference

Here are the descriptions of the envelope and recipient events sent by Connect as documented in Change DocuSign Connect for Salesforce Settings.

Envelope Event Descriptions

- **Sent**: This event is sent when the email notification, with a link to the envelope, is sent to at least one recipient. The envelope remains in this state until all recipients have viewed the envelope.
- **Delivered**: This event is sent when all recipients have opened the envelope through the DocuSign signing website. This does not signify an email delivery of an envelope.
- **Signed**: This event is sent when the envelope has been signed by all required recipients. Note that this is a temporary state used during processing, after which the envelope is automatically moved to Completed status.

- **Completed**: The envelope has been completed by all the recipients.
- **Declined**: The envelope has been declined by one of the recipients.
- **Voided**: The envelope has been voided by the sender.

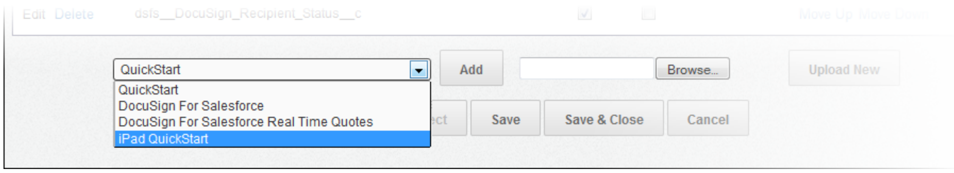
Recipient Event Descriptions

- **Sent**: This event is sent when an email notification is sent to the recipient signifying that it is their turn to sign an envelope.
- **Delivery Failed**: This event is sent when DocuSign gets notification that an email delivery has failed. The delivery failure could be for a number of reasons, such as a bad email address or that the recipient's email system auto-responds to the email from DocuSign. This event can only be used if "Send-on-behalf-of" is turned off for the account.
- **Delivered**: This event is sent when the recipient has viewed the document(s) in an envelope through the DocuSign signing web site. This does not signify an email delivery of an envelope.
- **Signed/Completed**: This event is sent when the recipient has completed (signed) the envelope. If the recipient is not a signer, this is sent when the recipient has completes their actions for an envelope. Signed is a temporary state used during processing, after which the recipient is automatically moved to Completed.
- **Declined**: This event is sent when the recipient declines to sign the document(s) in the envelope.
- **Authentication Failure**: This event is sent when the recipient fails an authentication check. In cases where a recipient has multiple attempts to pass a check, it means that the recipient failed all the attempts.

Enable DocuSign Connect for Salesforce for use with the iPad

This feature lets envelopes with Salesforce items sent through the DocuSign for iPad app send updates back to Salesforce through DocuSign Connect for Salesforce. You must be a DocuSign for Salesforce Administrator to enable this feature.

1. In the DocuSign application, go to **Preferences** and click **Connect**.
2. Go to the bottom of the page, select **iPad QuickStart** in the QuickStart list and click **Add**.



3. The system asks if you want to append your current configuration. Click **OK** to continue.
4. Click **Save** or **Save & Close** to save the changes.

Download and Upload DocuSign Connect for Salesforce Settings

DocuSign recommends that you save your DocuSign Connect for Salesforce settings before and after making any changes to your settings by downloading and saving the XML configuration file. The saved version of your DocuSign Connect for Salesforce settings can be uploaded to the system to restore the settings.

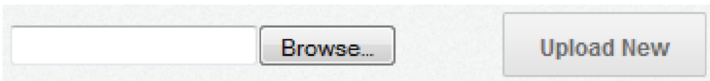
Download your DocuSign Connect for Salesforce Settings

1. From the force.com apps drop-down list, select **DocuSign for Salesforce**.
2. If not already selected, click the **DocuSign Admin** tab and then click the **DocuSign** tab.
   The DocuSign web application opens in a new browser window.
3. From the DocuSign application, click the Account Select list and select **Preferences**.
   The DocuSign Account Preferences page is displayed.
4. In the Navigation Panel on the left side, under the Account Administration section, click **Connect**. The DocuSign Connect Settings page is displayed. Verify the Salesforce tab is selected.
5. At the bottom of the DocuSign Connect Settings page, click **Download**.
   The file is saved as an XML file with the default name “DocuSignToSFConfig”. You can change the file name.

Upload your DocuSign Connect for Salesforce Settings

1. From the force.com apps drop-down list, select **DocuSign for Salesforce**.
2. If not already selected, click the **DocuSign Admin** tab and then click the **DocuSign** tab.
   The DocuSign web application opens in a new browser window.
3. In DocuSign, click the Account Select list and select **Preferences**.
   The DocuSign Account Preferences page is displayed.

4. In the Navigation Panel on the left side, under the Account Administration section, click **Connect**. The DocuSign Connect Settings page is displayed. Verify the Salesforce tab is selected.
5. At the bottom of the DocuSign Connect Settings page, click **Browse** and select your DocuSign Connect Settings XML configuration file or type the file location and name in the field.



6. Click **Upload New** to upload the configuration file.

Change DocuSign Connect for Salesforce Account Settings

Only use this procedure if you are changing the configuration for DocuSign Connect for Salesforce.

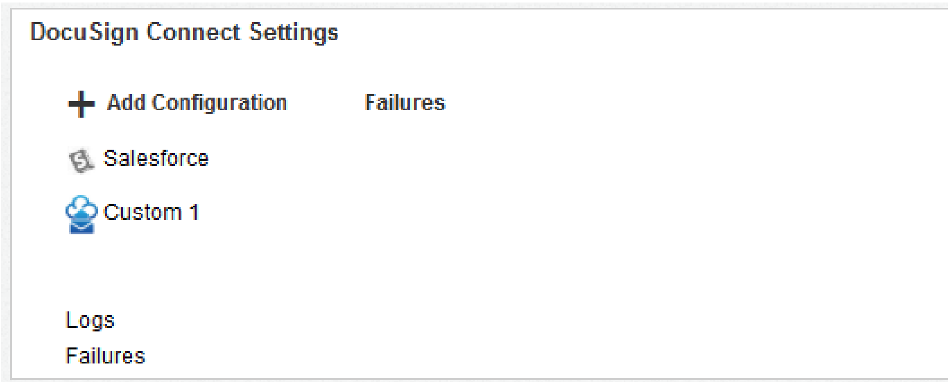
The first part of the setup is to notify the DocuSign Connect setup how to access your Salesforce account. This is accomplished by obtaining the Salesclerk GUID for Third-party applications, and using it, along with your Salesforce username and password, in the DocuSign Connect Setup.

1. If you do not know your Salesforce GUID, you can obtain a security token from Salesforce as follows:
   a. From Salesforce.com, click your User menu and select **Setup**.
   b. Under Personal Information, find and click the **Reset your security token** link.
   c. Click **Reset Security Token**.

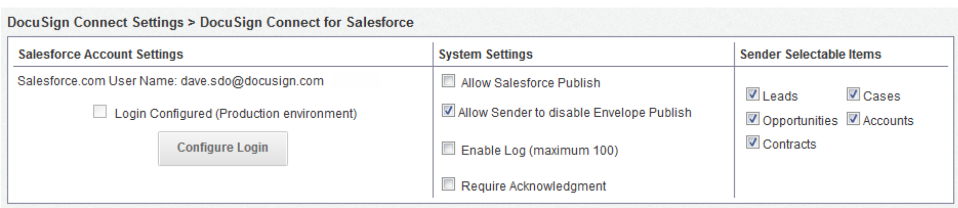
   > **IMPORTANT:** This will invalidate any other tokens you may have.

   The new security token is sent to your email.
2. From the force.com apps drop-down list, select **DocuSign for Salesforce**.
3. If not already selected, click the **DocuSign Admin** tab and then click the **DocuSign** tab. The DocuSign web application opens in a new browser window.
4. In DocuSign, click your profile image at the top of the application and select **Preferences**. The DocuSign Account Preferences page is displayed.
5. In the navigation bar on the left side of the page, under the Account Administration heading, click **Connect**.
   The DocuSign Connect Settings page appears. The page has a list of existing Connect

configurations and allows you to access the Connect logs and failures pages.



6. Click **Salesforce** to work with the DocuSign Connect for Salesforce configuration. The configuration page appears.



7. Click the **Configure Login** button.
   a. Type your Salesforce User Name.
   b. Type your Salesforce password with your security token in the Salesforce.com Password field.
   c. If your password is mypassword and your security token is 12345678, you must enter mypassword12345678 in the field.
   d. Re-enter your password and security token.
8. Click **Save**. You are returned to the DocuSign Connect Settings page and you can make any other DocuSign Connect for Salesforce setting changes.