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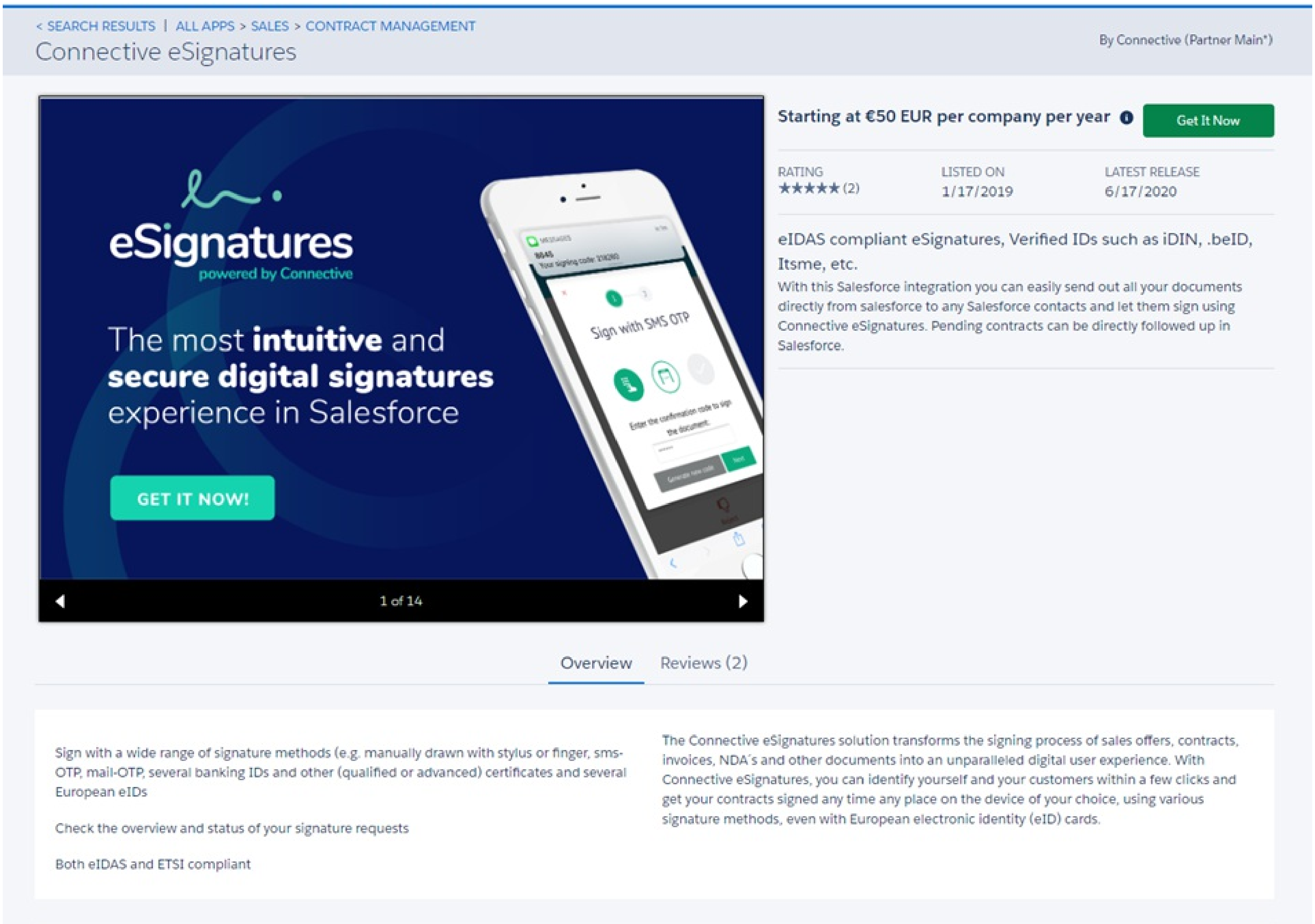
1. Get the connector

To get access to the Connective eSignatures Connector:

- Go to the AppExchange and search for *Connective eSignatures*.



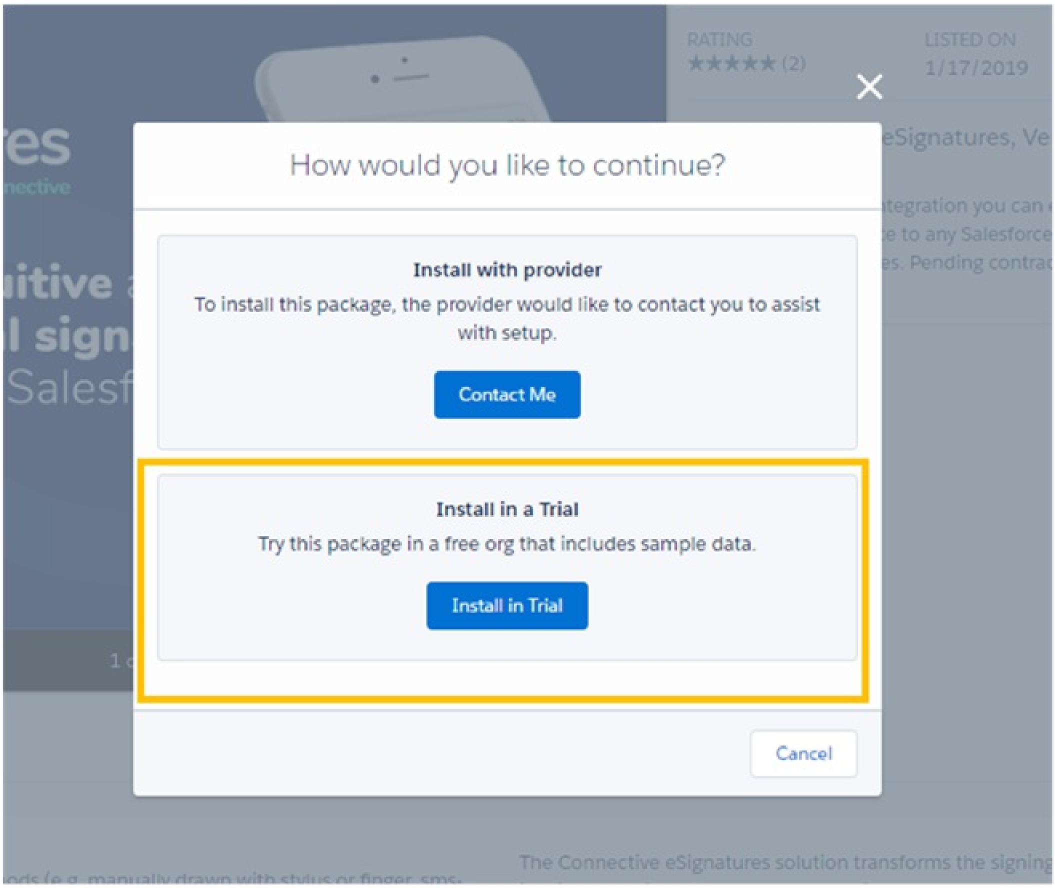
Request a trial

It is possible to request a trial of the Connective eSignatures Connector.

To do so:

- Click **Get it Now**.
- Select **Install in a Trial**.

  Note that you need to be logged in to get the below screen.



You will be granted 30 day access to a trial environment on which the Connector is preinstalled and preconfigured.

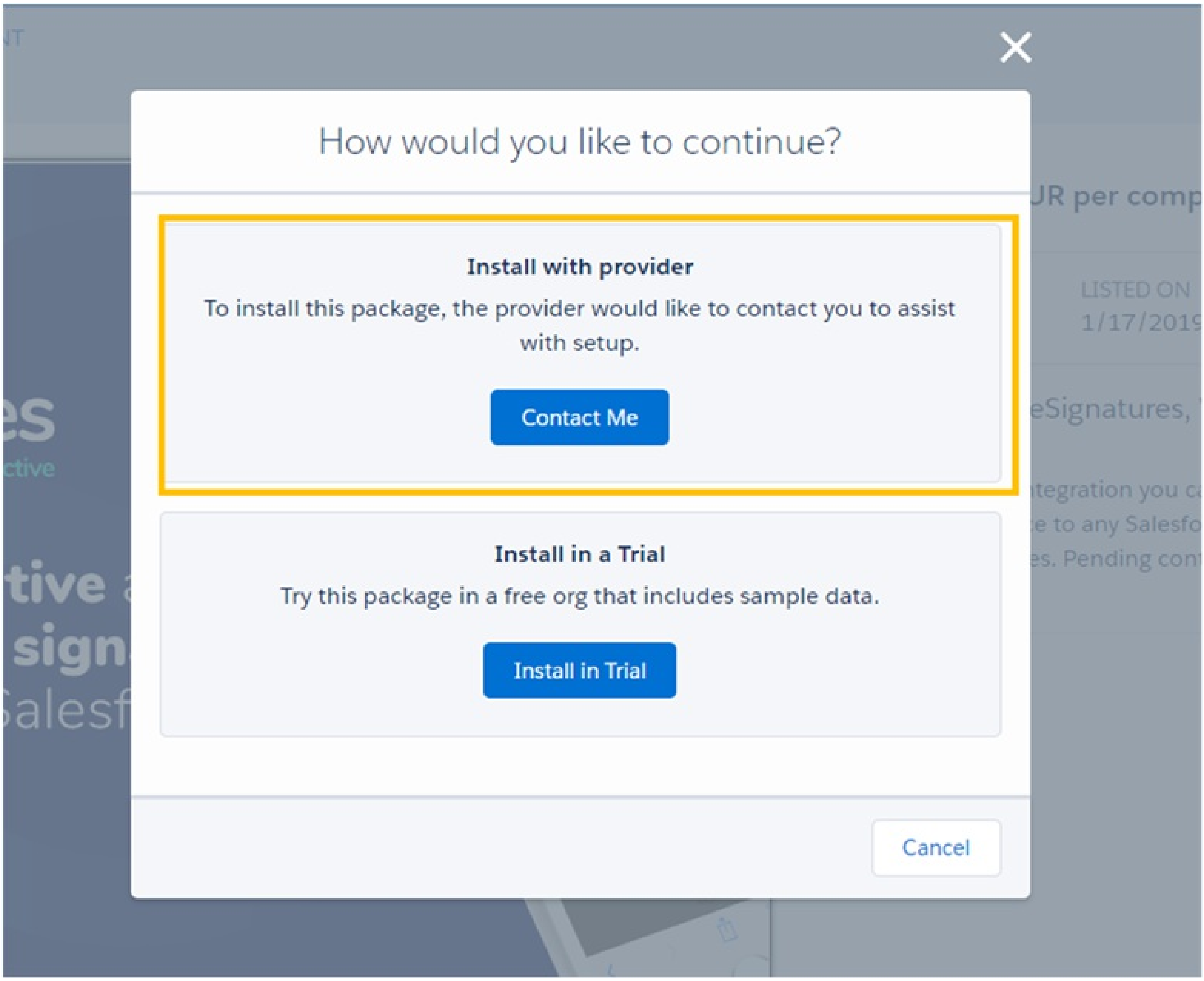
Have a look at our Quick Start Guide Trial Version to get more info.

Request access to production version

To request access to the production version of the Connective eSignatures Connector:

- Click **Get it Now**.
- Select **Install with provider**.

  Note that you need to be logged in to get the below screen)



We will contact you shortly to install the connector within your Salesforce Org.

2. How to set up the connector

2.1 Configuring the connector

The behavior of the Salesforce connector can be configured by a Salesforce user who has the **connective-admin** permission set. This chapter will highlight the configuration that may impact user experience for the end user.

If you want any of these settings adapted, reach out to your Salesforce connector sysadmin.

Are you an Salesforce administrator and do you need help configuring the connector? Contact service@connective.eu.

Schedules settings

The Schedules settings allow to define the automatic batch job for updating document statuses.

It is also possible to request a manual status update. To do so, navigate to the required document and click **Refresh Status**.

NAME	DESCRIPTION
Number of times	The number of times per day that the batch will update the open packages.
Activate Schedule	Enable or disable the automatic batch.
Assign default owner	The default owner that uploads a signed document (either through the batch or manually). If left empty, the *currentUser* will be the default owner.

Environment settings

The Environment settings will apply to the complete Salesforce org.

NAME	DESCRIPTION
Enforce Standard Values	This parameter allows to enforce default values set within the configuration. If enforced, an initiator will not be able to adapt the default values set in the configuration. (They will be greyed out or hidden.)
Use Automatic Signing Fields	When activated, the initiator will not need to define the signing fields to be used per signer. Following principle will be used: • Document 1 – Signer 1 --> Marker SIG01 • Document 1 – Signer 2 --> Marker SIG02 • Document 1 – Signer X --> Marker SIG0X • Document 2 – Signer 1 --> Marker SIG01 • ... Please note that it is up to the initiator to ensure that the document contains the correct markers. If the required markers are not present, it will result in an error during the upload process.
Hide Group Code Fields	Allows to disable the choice of the document group code during the upload process.

Document group settings

The Document group settings allow to configure the user experience per document group. It is possible to provide a general setting (on *Default Settings Document Group*) or to define the specific parameter per document group. The standard practice is that if no Document Group Specific parameter has been set, the *Default Settings Document Group* apply.

NAME	DESCRIPTION
Standard Mandated Signer Method	Allows to set the standard Mandated Signer Method in the upload process: • Disabled • NameAndBirthDate • MatchID For an explanation on what the mandated signer functionality does, please see Mandated Signer.
Standard Legal Notice	Allows to set the default Legal Notice to be used in the upload process • Disabled • LegalNotice1 • LegalNotice2 • LegalNotice3 LegalNotice1 / LegalNotice2 / LegalNotice3 are legal notices that can be configured within eSignatures. LegalNotice1: Read and approved LegalNotice2: Read and approved for [AMOUNT] EUR. Signed at [PLACE] on date [DATE] LegalNotice3: Guarantor liable for an amount of [AMOUNT] EURO for [TOPIC]
Standard Signing Sequence	Allows to set the default signing sequence to be used in the upload process: • Parallel • Sequential
Standard Expiration Time (in days)	Allows to set the default Expiration Time to be used in the upload process. If the value is set to 10, the default Expiration Date will be today +10 days.
RedirectUrl	Allows to set the RedirectUrl to be used.
CallbackUrl	Allows to set the CallBackUrl to be used.
Initiator	Allows to set the default initiator to be used when uploading a document. If no default initiator is used, the currentUser will be the initiator during the upload process. Note: the initiator has to be a registered user on the eSignatures platform.
Hide... Field	Allows to hide fields from the initiator – to be used in combination with Standard Values. Following fields can be hidden • Mandated Signer • Expiry Date • Group Code • Legal Notice • Signing Sequence
Manual Signing Location	Allows to define (two) default signing field definitions (when *Automatic Signing Fields* are not used. It is possible to define either a Marker or to define a position.
Restrict the Signer	When activated, the initiator will only be able to see contacts that are linked to the account to which the object where the signing process is initiated is linked to. E.g. Signing flow is started from an opportunity for account ABC > You will only see contacts that are linked to account ABC when adding a signer. The restriction does not apply to receivers.

NAME	DESCRIPTION
Allowed Signing Methods	Allows to define which signing methods are available for the initiator during the upload process. **For SMS**: it is possible to define the default Mobile Country Code. This will be used to append to the Mobile Phone value of your contact when the country prefix is not present in the Mobile Phone field. E.g. Contact has a mobile phone number: 04xx xxx xxx > Using the Mobile Country Code parameter, the connector will automatically set the phone number to +32 4 xx xxx xxx. **Note:** The signing method must be active on the eSignatures platform. Check with Connective Support in case of any doubts.

2.2 Quick Start Guide trial version

The trial version of the Connective eSignatures Connector has a default configuration preset that allows to get an overview of the different functionalities without the need to configure the connector.

Default configuration

In chapter 2.1 Configuring the connector you'll find a full overview of the configuration possibilities of the connector. The current chapter highlights the configuration that has been preset for the trial version.

Network settings

The connector is already linked to a specific eSignatures environment that is used for this trial.

General settings

The connector has been configured to use **Automatic Signing Fields**. Consequently, it is important that you use documents that contain markers. An example is provided within the *salesforce.com - 5000 widgets* opportunity.

Schedules settings

The connector has been configured to automatically update all document statuses once every hour.

Document Group Settings

The following configuration has been applied:

- *Legal notice* has been disabled and hidden.
- *Mandated signer* has been disabled and hidden.
- *Signing sequence* has been set to *Parallel* by default.
- *Expiry date* has been set to today + 30 days by default.

The following signing methods have been enabled:

- Email One Time Password
- SMS One Time Password
- Manual Scribble
- Belgian eID

How to start using the connector

As mentioned above, given the preset configuration, it is important to use a document that contains markers (cfr. PDF Signing Locations).

An example document has been provided in the *salesforce.com - 5000 widgets* opportunity.

Should you have any questions on how to prepare your own document with markers, don't hesitate to reach out to service@connective.eu.

The usage of the connector itself is further detailed in 3. Start using the connector

3. Start using the connector

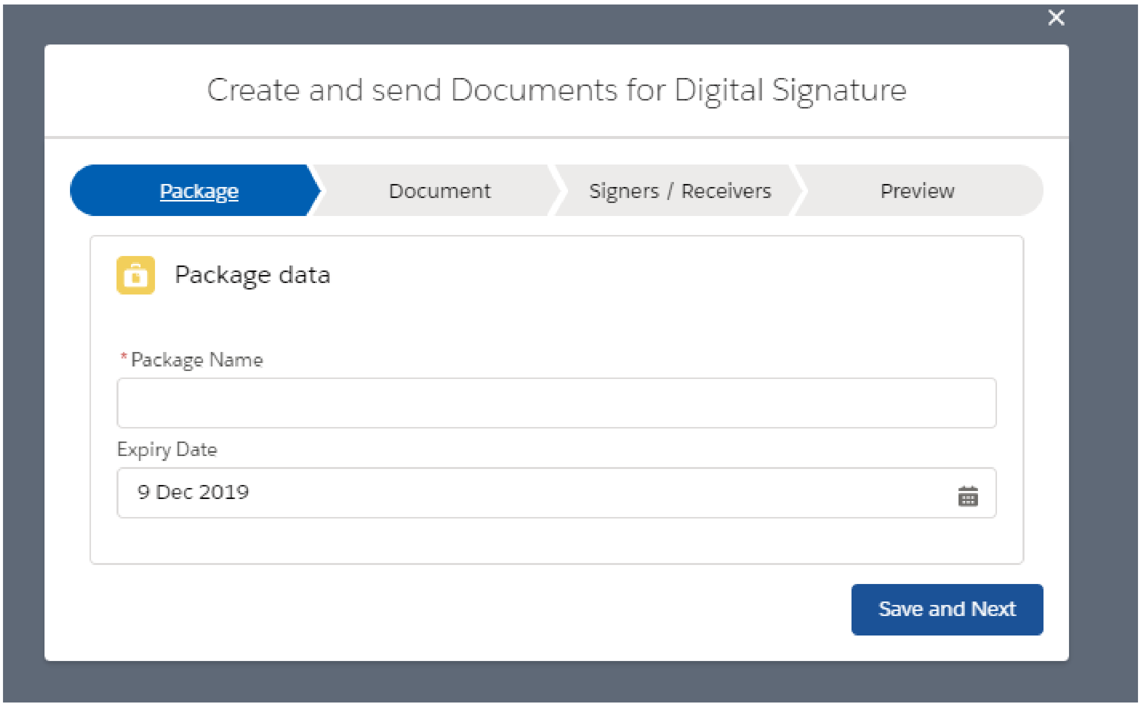
3.1 Create a Connective eSignatures document

In the following chapter, a step by step overview is provided of how you can upload (a) document(s) to eSignatures. Please be advised that some screenshots may differ from the actual implementation within your Salesforce org. For more information on the different configuration possibilities, have a look at Configuring the connector.

Create the package

- Log in to your Salesforce org.
- Depending on how your Salesforce org has been configured, you can create an eSignatures document from within **Opportunities, Contacts, Accounts**, a custom object or at the Connective eSignatures Document list page. In this manual we explain how to create an eSignatures document from within **Opportunities**.
- Click the **Opportunities** tab.
- Search for the correct Opportunity you want to start the signing session from.
- At the right-hand side of the screen, click the down arrow next to **Connective eSignatures Documents**, and click **New**.

- Enter a **Package Name** and set an **Expiry Date**.

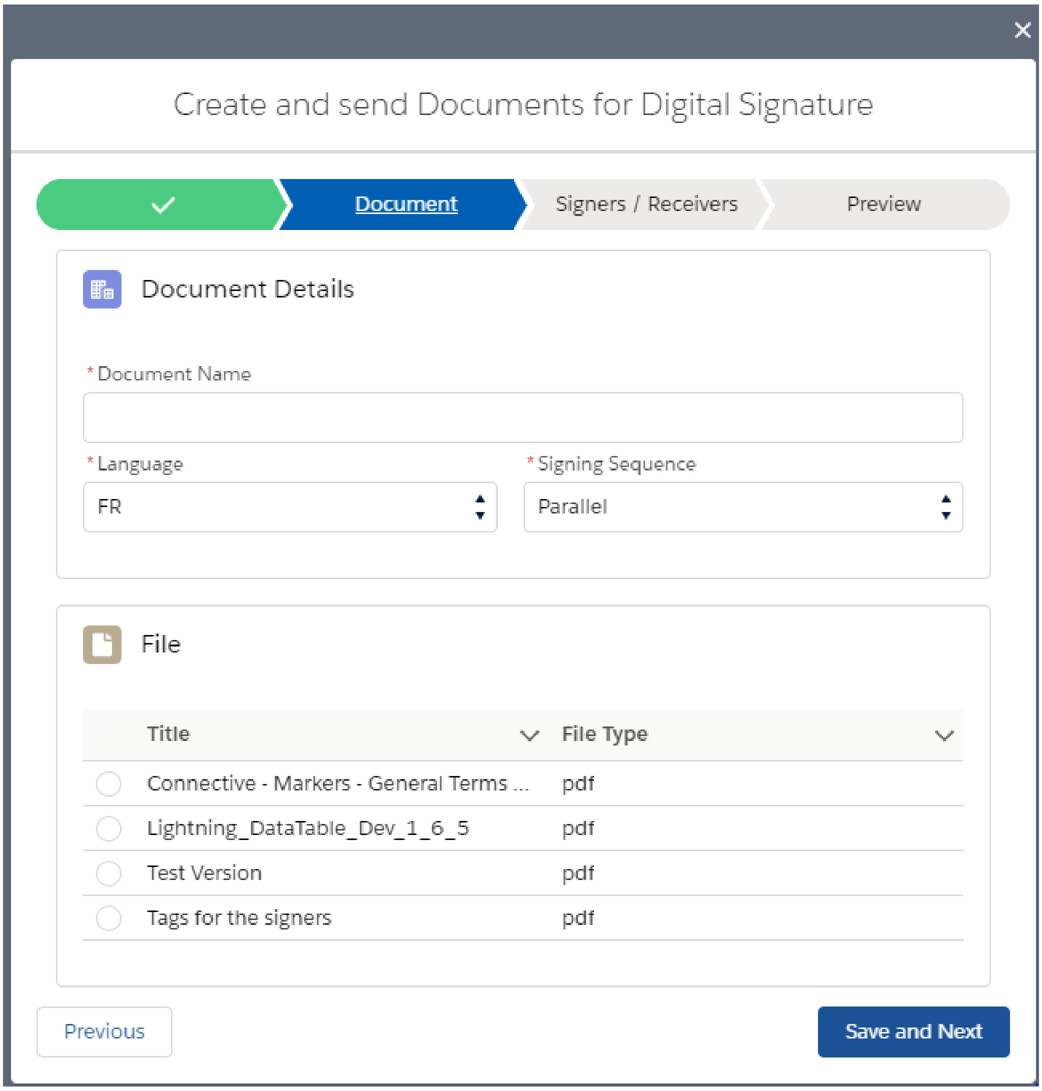


- **Note**: eSignatures does not support the following characters in file names:

CHARACTER	NAME
/	Slash
\	Backslash
?	Question mark
%	Percent
*	Asterisk
:	Colon
|	Vertical bar
"	Quote
<	Less than
>	Greater than

- Click **Save and Next** .

Add document

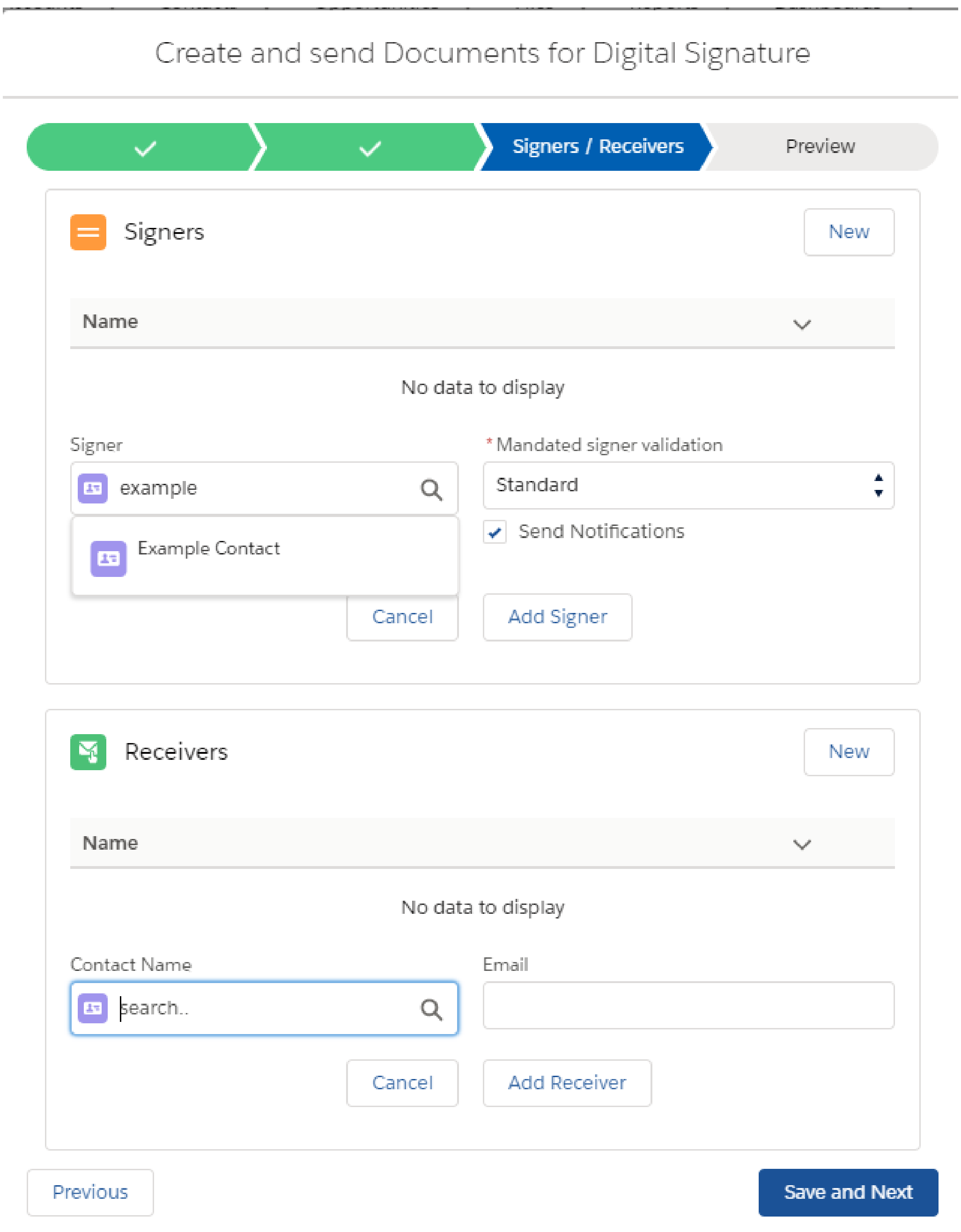


- Provide a **document name** (or select a document from the bottom - the name will be copied).
- **Select** the **language** in which the document is drafted. You can add documents in English, French, Dutch and German. When you choose to add legal notices, they'll be written in the language you select here.
- Decide whether to add a Legal Notice to your documents.

  Important:

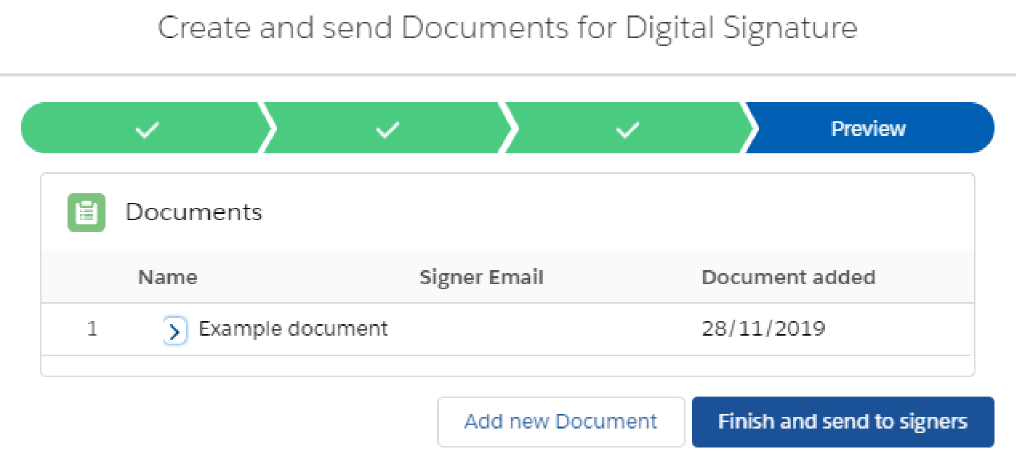
  When you add a legal notice, the signers need to retype the exact content of the legal notice before they're able to sign the document.
- Select the **Signing Sequence**: **Parallel** or **Sequential**.
  - Choose **Parallel** if the order in which the signers sign the document has no importance.
  - Choose **Sequential** to define a signing order: the signer won't be able to sign the document before another signer has signed it.
- Set an **Expiry Date** (optional). After this date, signers will no longer be able to sign the document.
- When you're done, click **Save and next**.

Add signers and receivers



- Click **New** to add a new signer.
- Search and select the right contact.
- Select the signer language (if no mapping was configured).
- Click **Add Signer**.
- Repeat the steps above for all signers you want to add.
- Click **New** to add a new receiver.
- Search and select the right contact.
- Click **Add Receiver**.
- Repeat the steps above for all receivers you want to add.
- Click **Save and Next**.

Add an additional document or send to signers



Within this step you can either **Add new document** at which point you will be brought back to the **Add document** step or you can **Finish and send to Signers**. A notification will be sent to the signers which allows them to access the document for signing.

3.2 Remind signers

As initiator you can send a notification to the signers, reminding them to sign the document.

- Click **Remind Signers**.
- A reminder email will be sent.

3.3 Revoke documents

As initiator you can revoke documents that were already sent to signers, but haven't been signed yet. Once a document has been revoked, signers will receive an email and they'll no longer be able to sign their documents.

- Click **Revoke**.
- The document status now changes to **Revoked**.

3.4 Extend expiry

When a value for the **ExpiryTimestamp** parameter was passed in the Create Package call, the package will reach the **Expired** status after the set time, if it hasn't been approved or signed yet. Once a package has reached **Expired** status it can no longer be approved or signed.

The **Extend expiry** feature allows to specify a new date in the future on which the package will expire, thus allowing it to be approved/signed again until that date and time.

By clicking the **Extend Expiry Date** button, the ExpiryTimestamp will be extended with the default number of days set in the configuration.