SignNow for Salesforce User Guide

Follow this guide to install, configure and use the SignNow application for your Salesforce organization.

Requirements:

Salesforce account and working knowledge of Salesforce.
SignNow account.

Update on
8.20.18

SignNow

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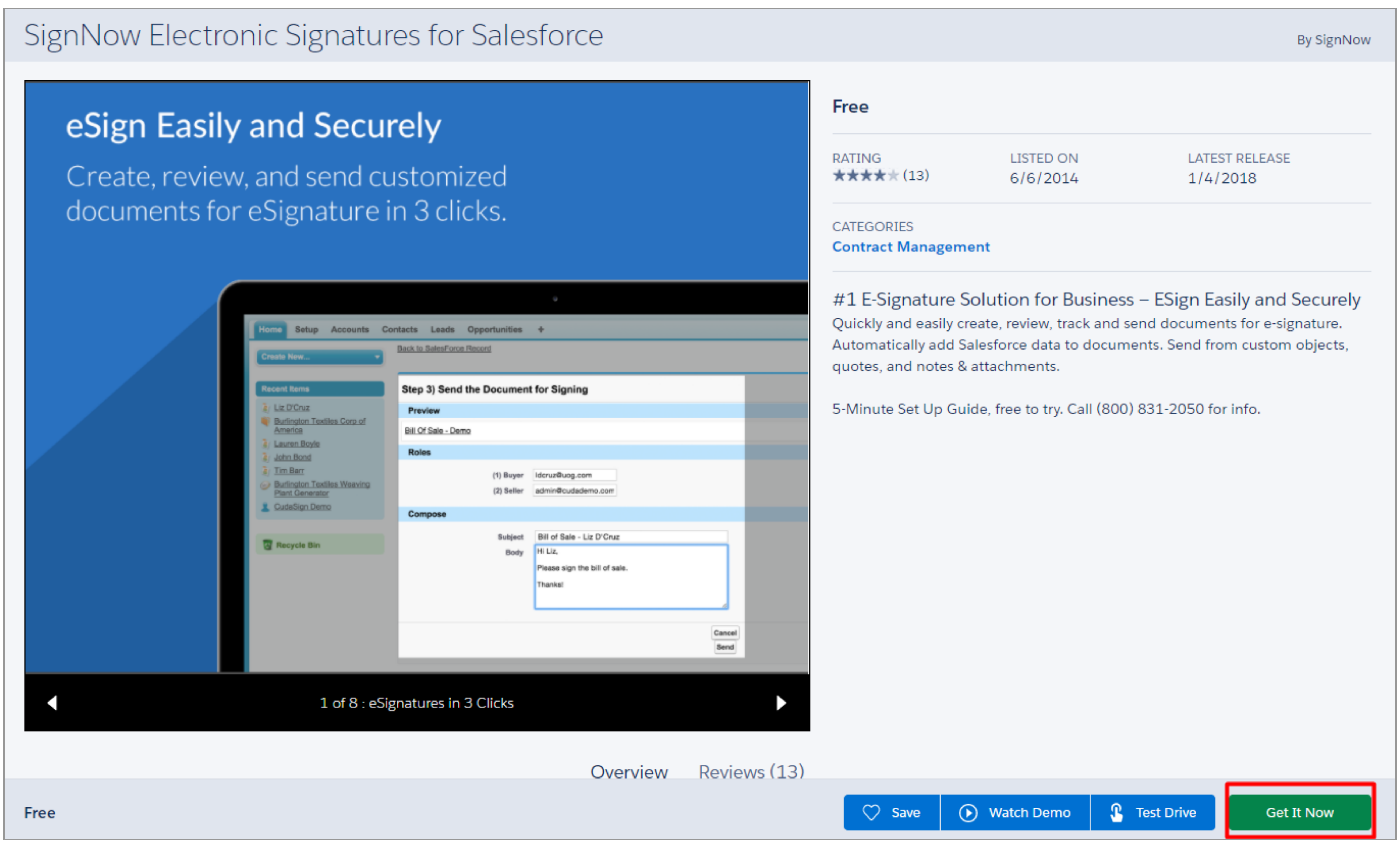
Installation and Configuration

Install the SignNow application for your Salesforce organization to create legally binding electronic signatures. Easily request e-signatures from your customers, colleagues and leads. Keep your documents organized and secure as well as looking neat and professional, all without leaving Salesforce.

The instructions below are a step-by-step guide for installing and configuring SignNow in your Salesforce organization.

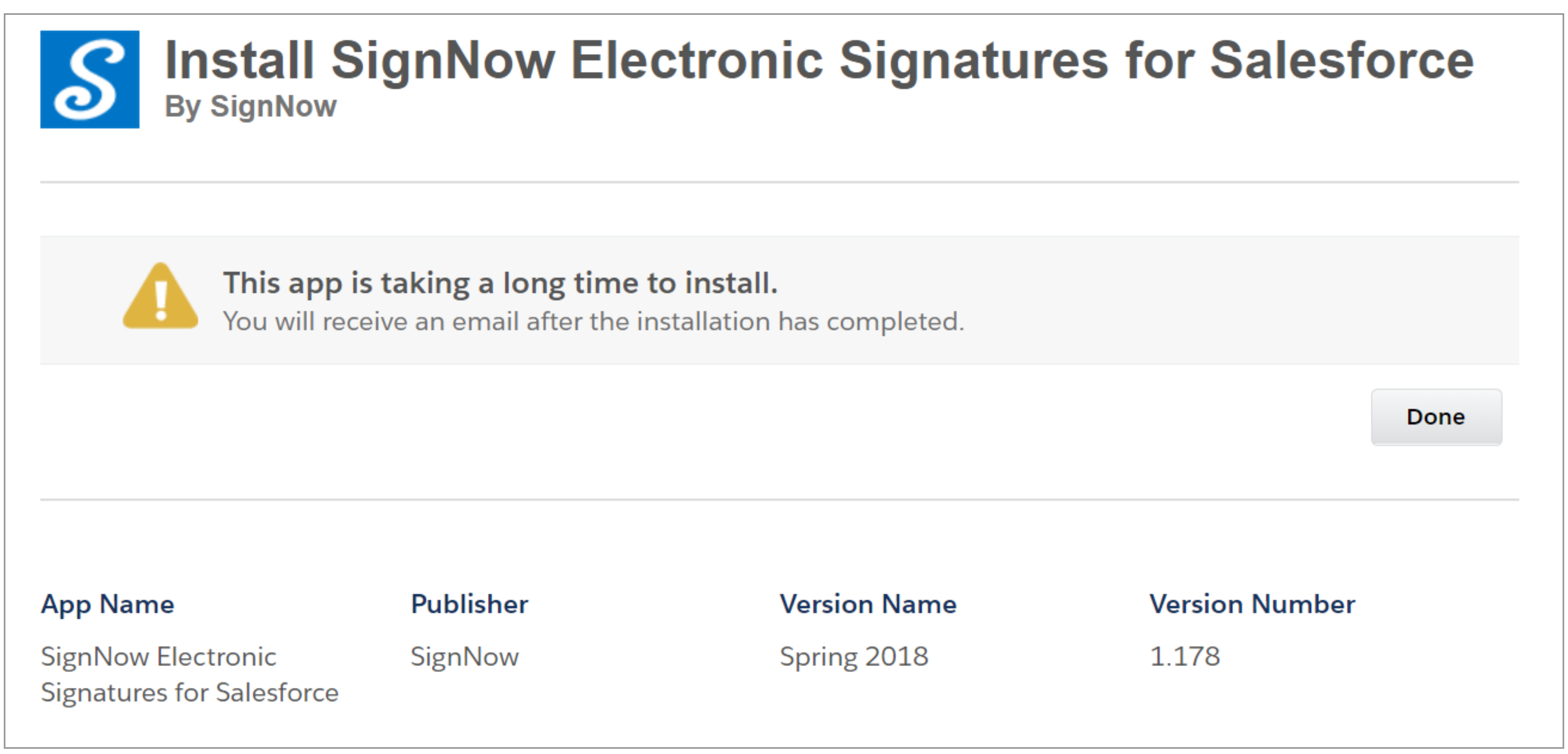
1. Log in to the [AppExchange]() with your Salesforce credentials and search for SignNow. Select it and click *Get It Now*.



Select *Install for All Users* and click *Install.*

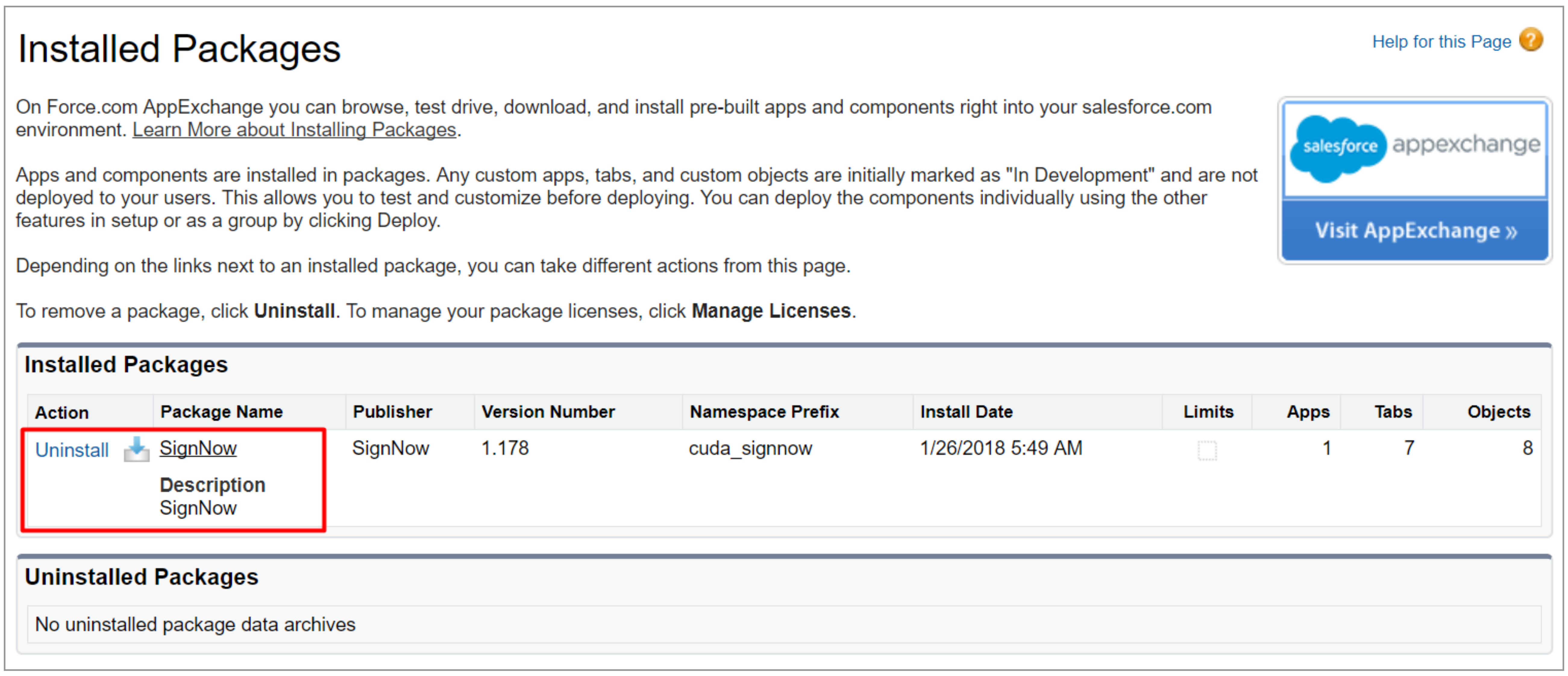
The Installation process may take several minutes. When installation is complete, you will be notified via email.

Click *Done* to proceed to your organization and configure the application.



Now that you've successfully installed SignNow for your Salesforce organization, you can proceed to configuration.

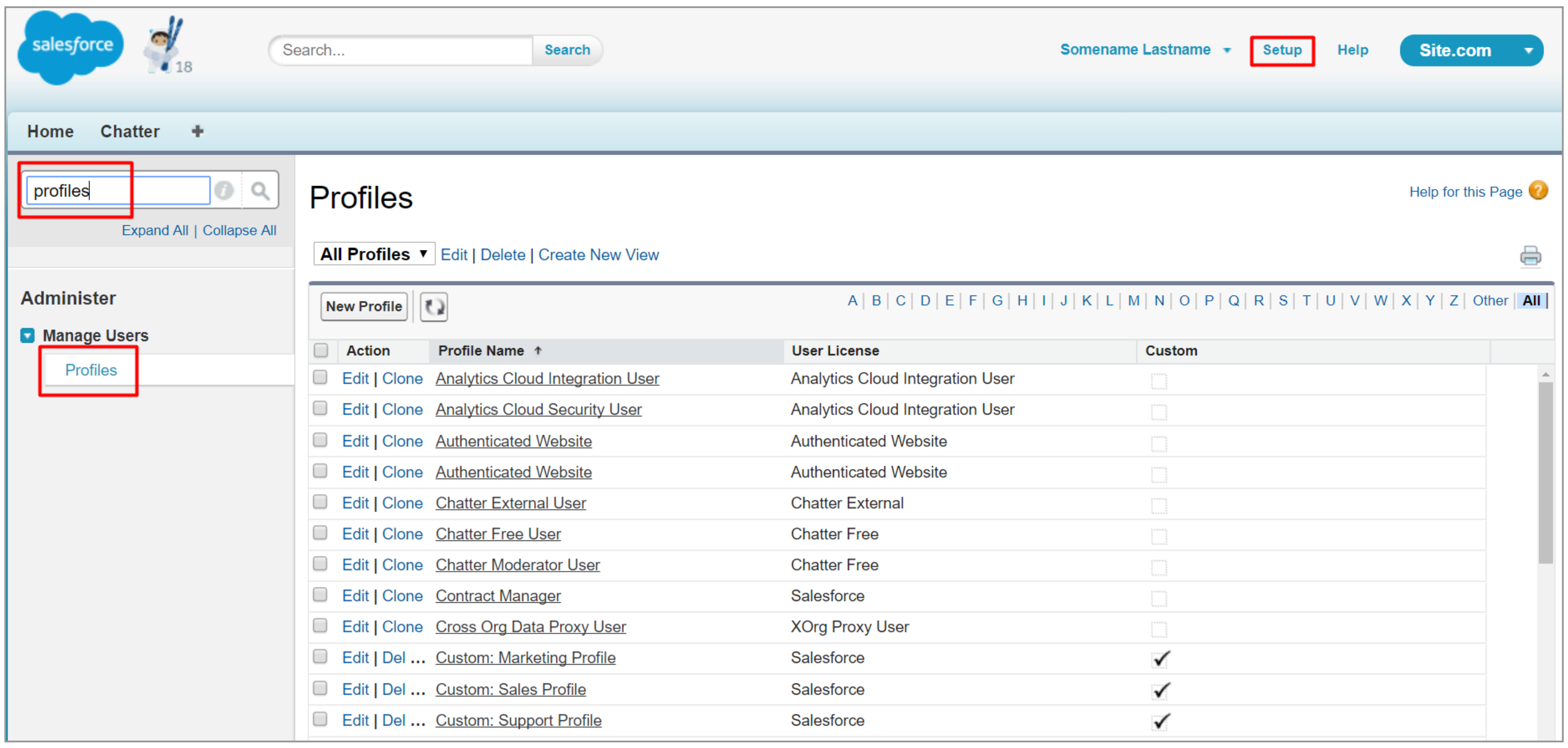
Note: if SignNow hasn't appeared in your Installed Packages section, try refreshing the page.



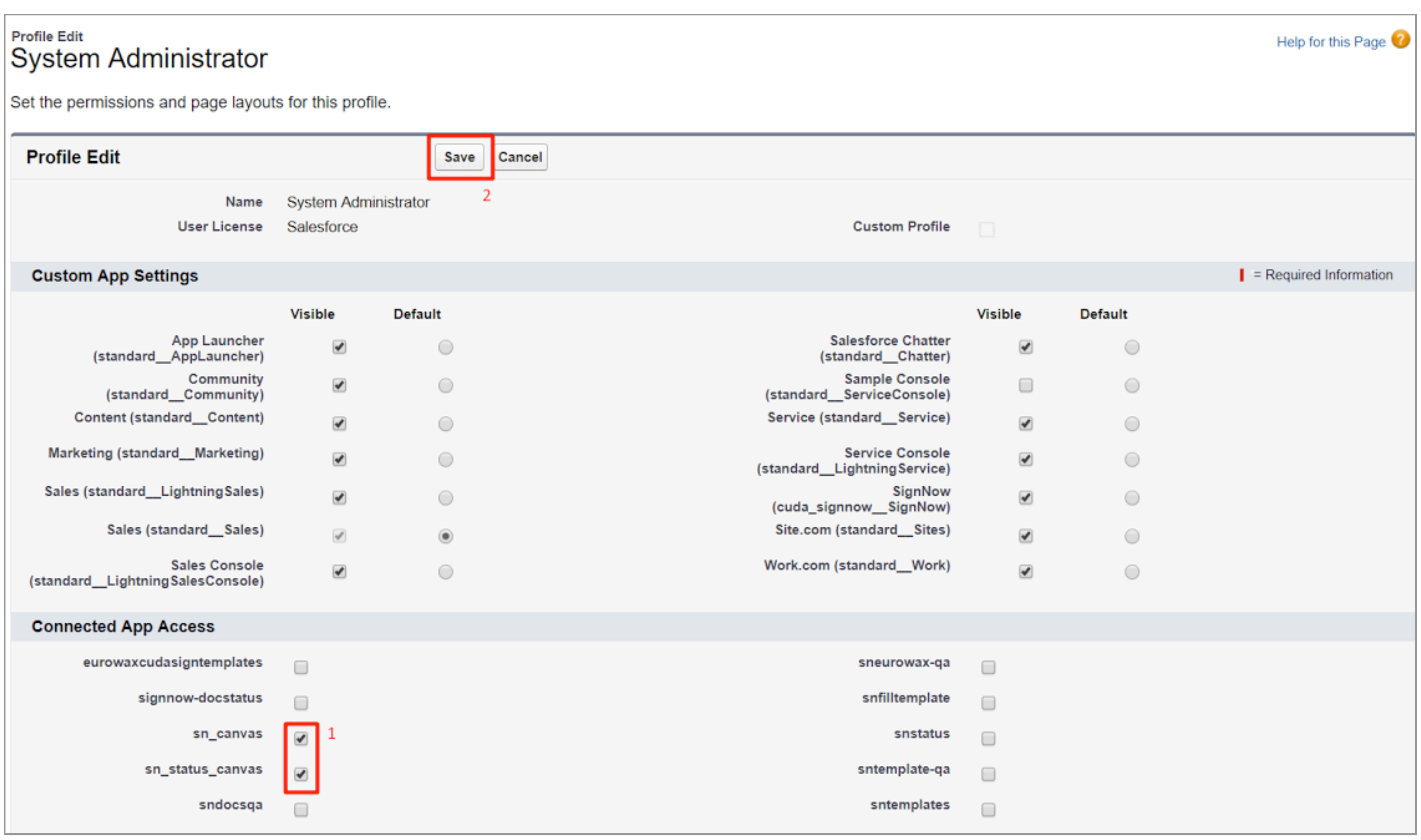
Enable Connected Apps

Connect SignNow to your Salesforce organization by enabling access to it. Follow these steps to enable access to SignNow connected apps:

1. Go to *Setup* and type *Profiles* in Quick Find. Select *Profiles* from the search results. Click *Edit* next to the required profile.

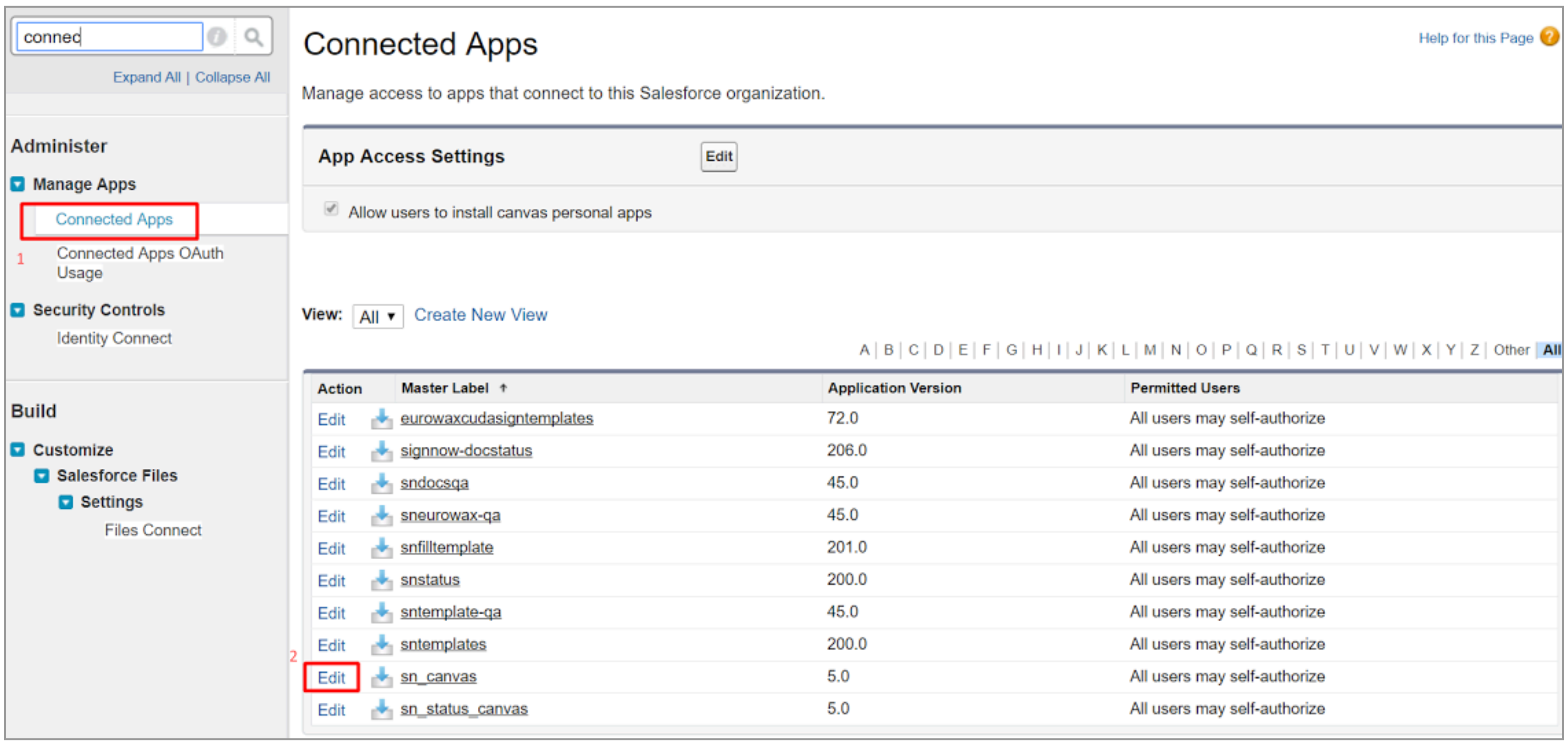


2. In the *Connected App Access* section check the *sn_status_canvas* and *sn_canvas* boxes and click *Save*.



3. In Quick Find type *Connected Apps* and select it from the search results.

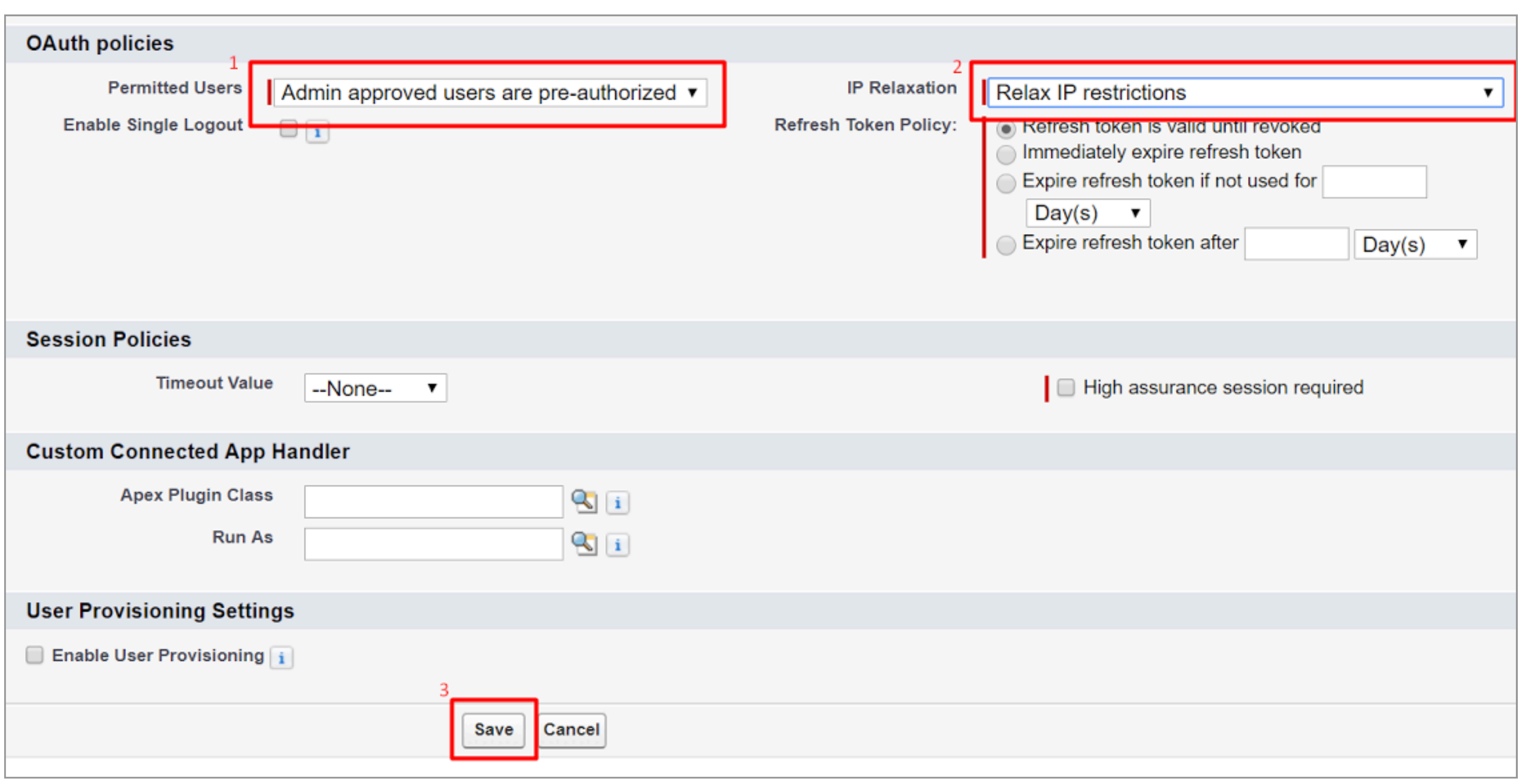
3.1. Find *sn_canvas* and click Edit.



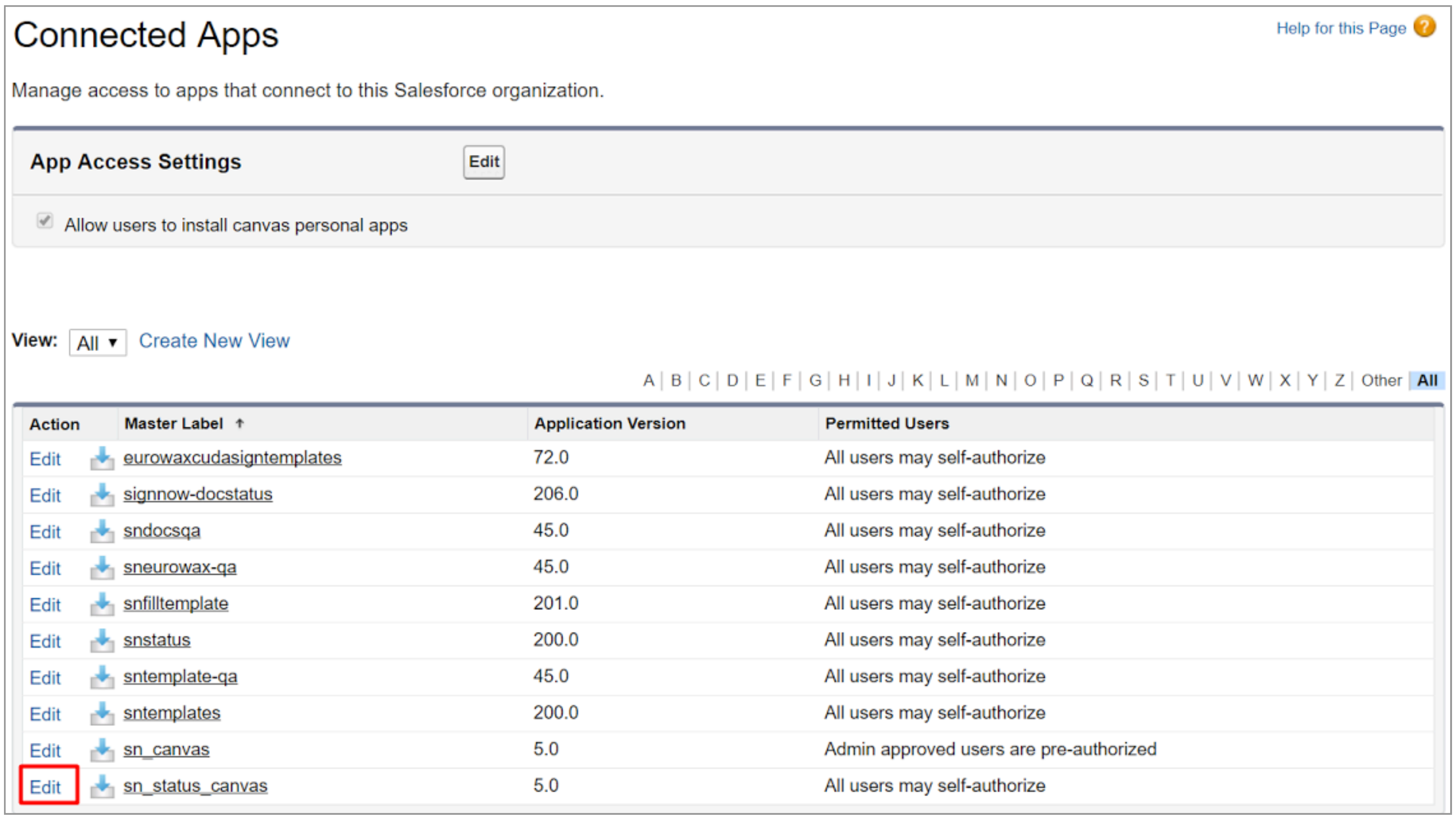
In the OAuth Policy section in the Permitted Users dropdown select *Admin approved users are pre-authorized*.

In the IP Relaxation dropdown select *Relax IP restrictions*.

Click *Save* to apply changes.

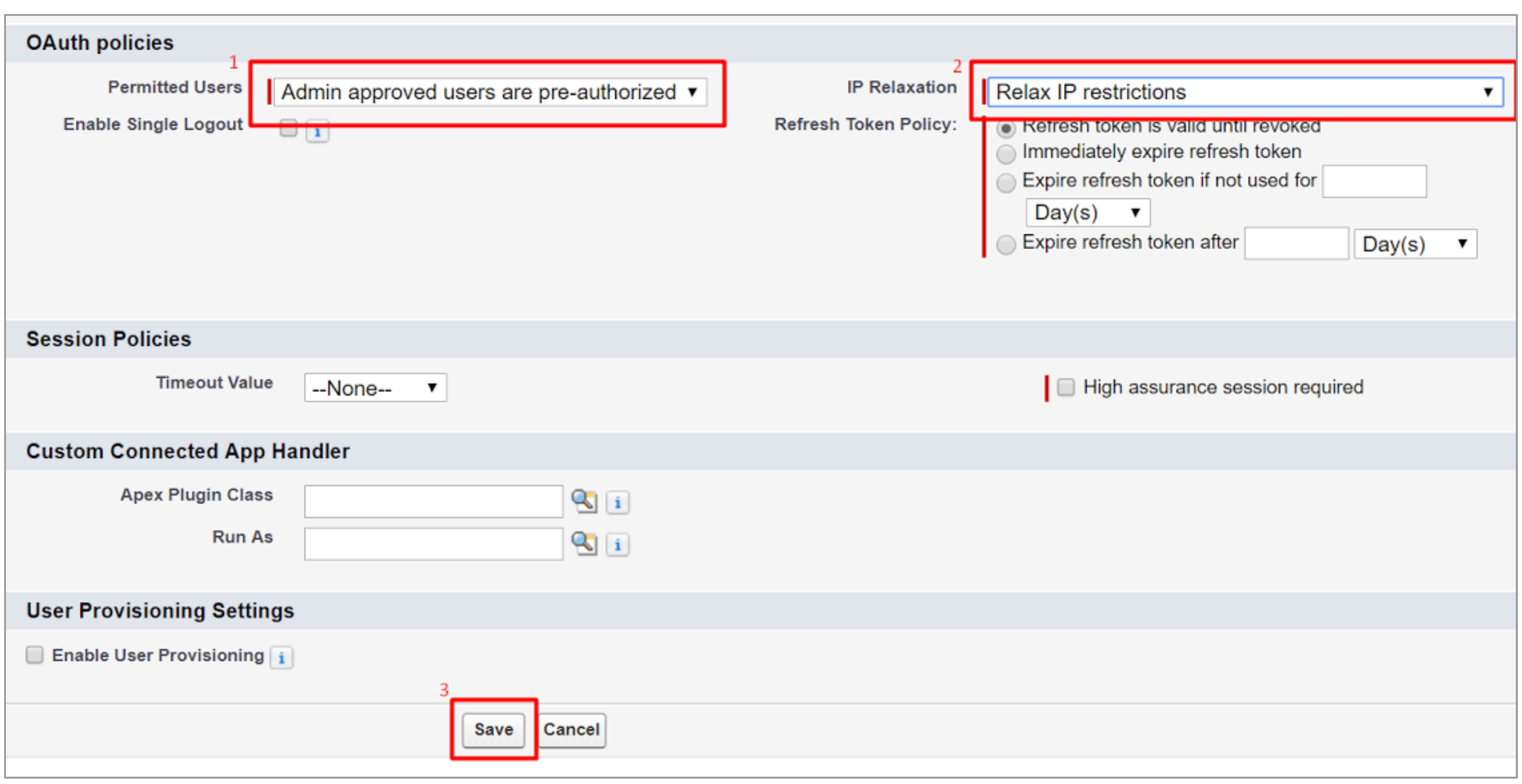


3.2. Find *sn_status_canvas* and click *Edit*.



In OAuth Policy section in Permitted Users dropdown select *Admin approved users are pre-authorized*.

In IP Relaxation dropdown select *Relax IP restrictions*. Click Save to apply changes.



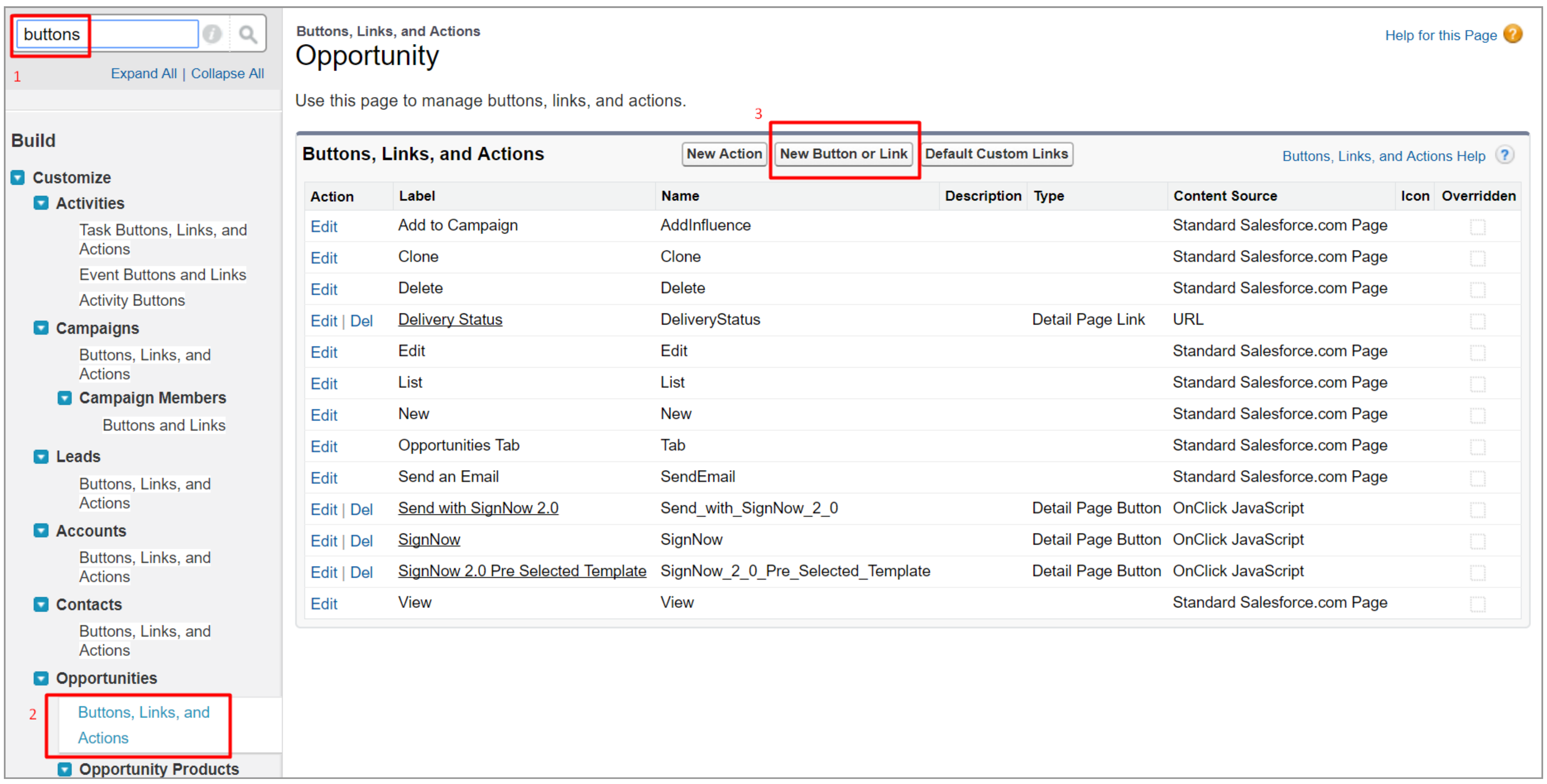
Now you can add SignNow buttons to your objects to use the SignNow application directly from your record pages.

Create SignNow Buttons

Follow these steps for adding SignNow buttons to your objects. Adding these buttons allows for using SignNow directly from your record pages.

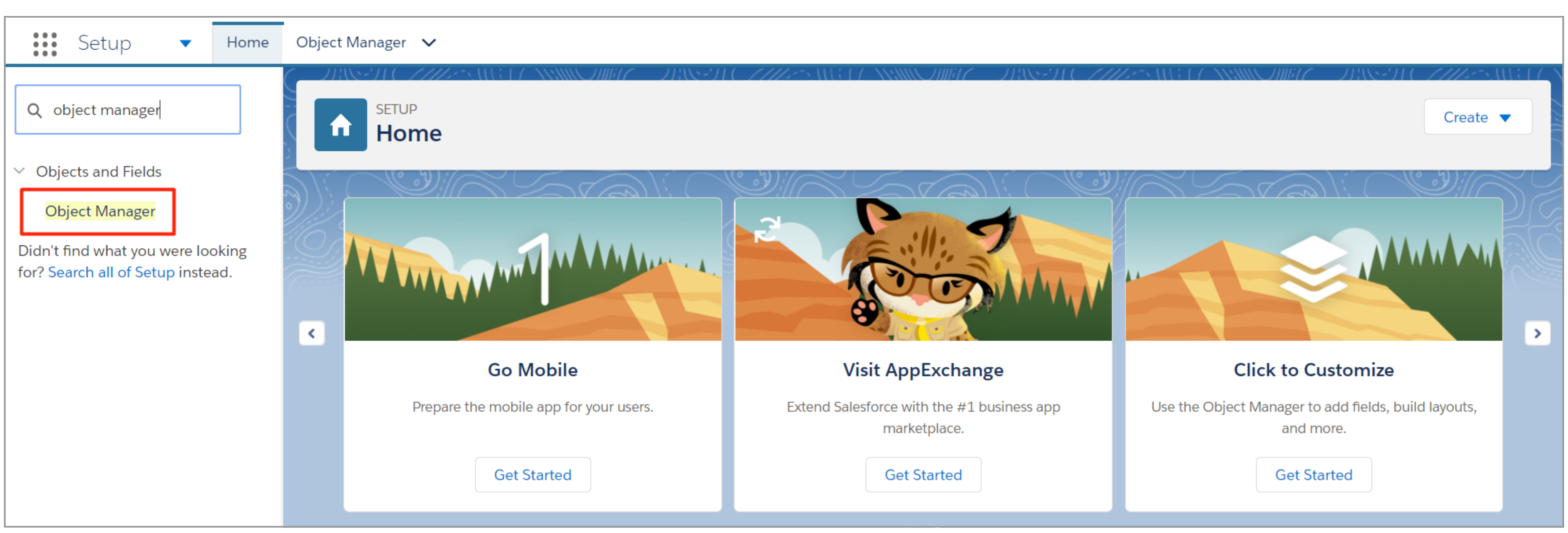
Classic Interface

Use *Quick* Find to locate *Buttons, Links and Actions* (Opportunity in the example) and click *New Button* or *Link*.

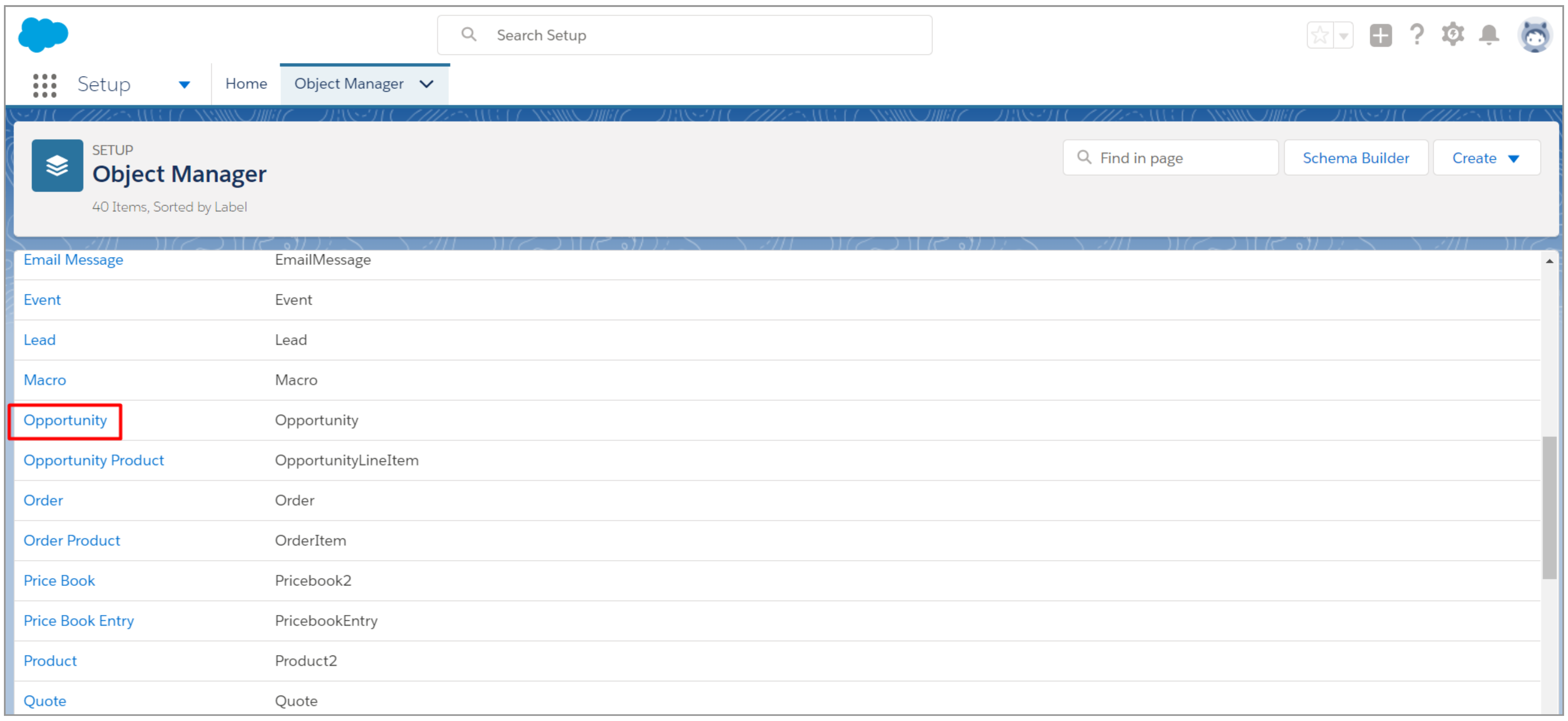


Lightning Interface

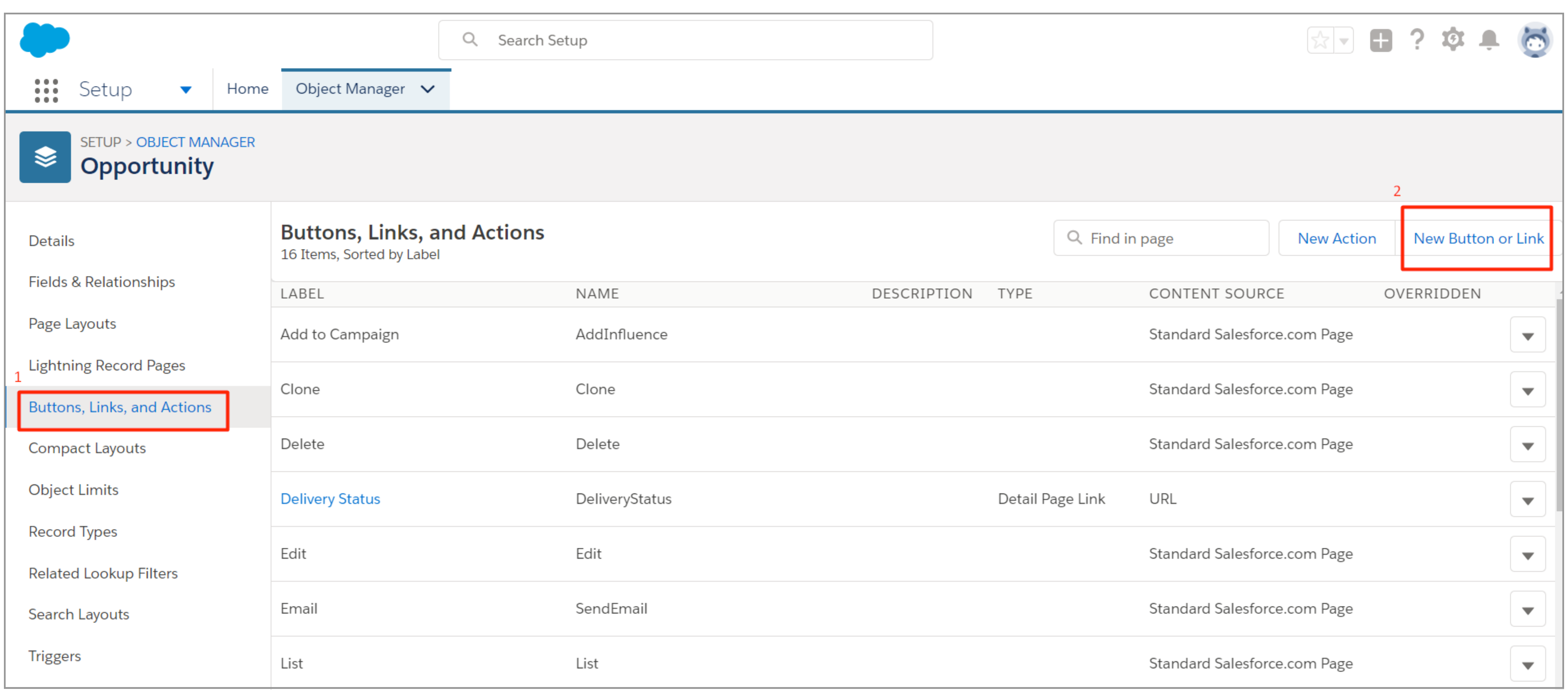
1. Use Quick Find to locate to the *Object Manager*.



2. Select the required object (*Opportunity* in the example).



3. Select *Buttons, Links, and Actions* and click *New Button* or *Link*.



Use our standard button codes to create buttons for your Salesforce Classic and Lightning.

1. Copy the button name you need and paste it into the Button Label field (the *Send With SignNow* button in the example).

2. For *Display Type* select *Detail Page Button*.

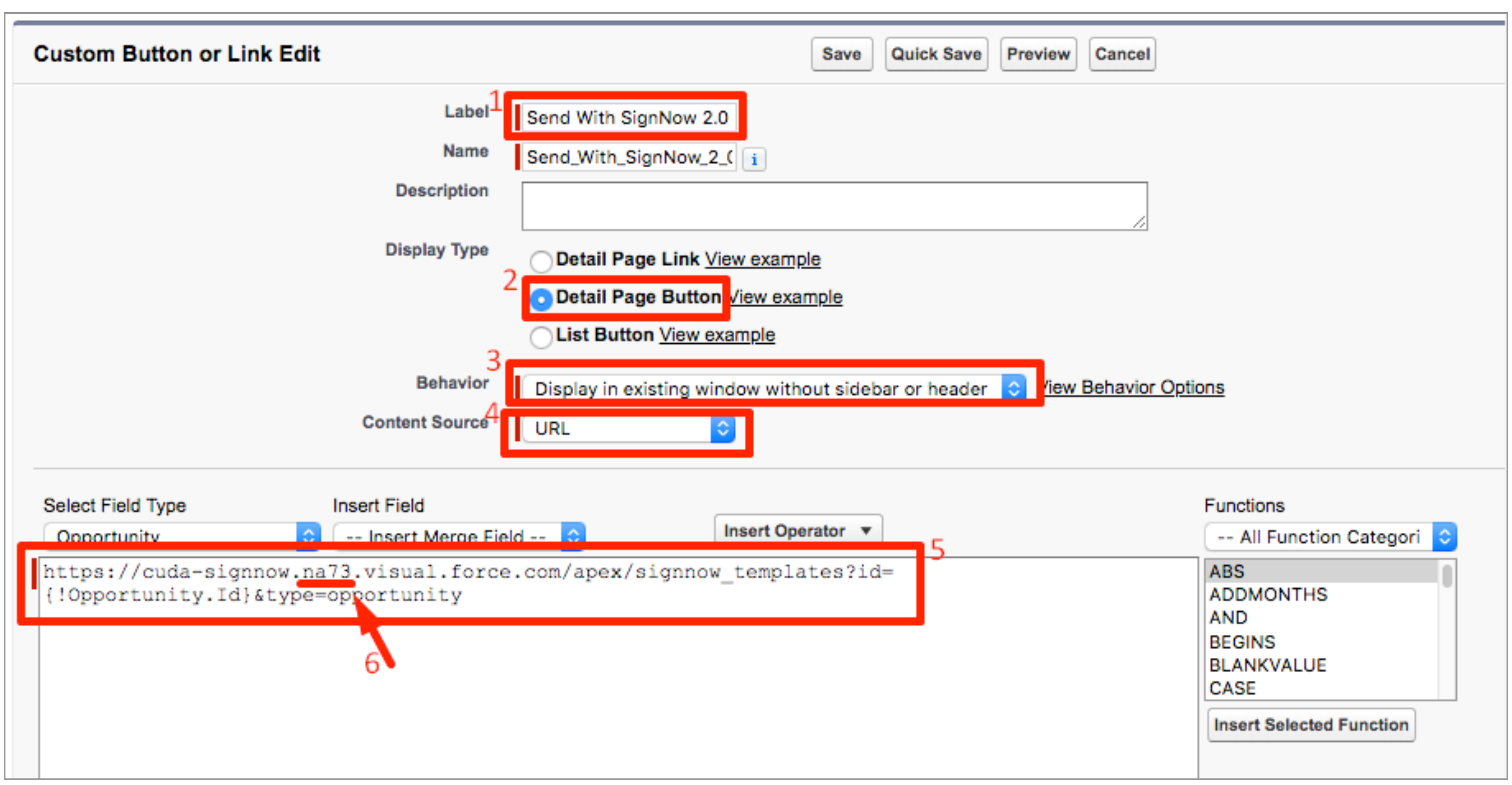
3. In the *Behavior* dropdown select *Display in existing window without sidebar or header*.

4. *Content Source* is set to *URL* by *default*.

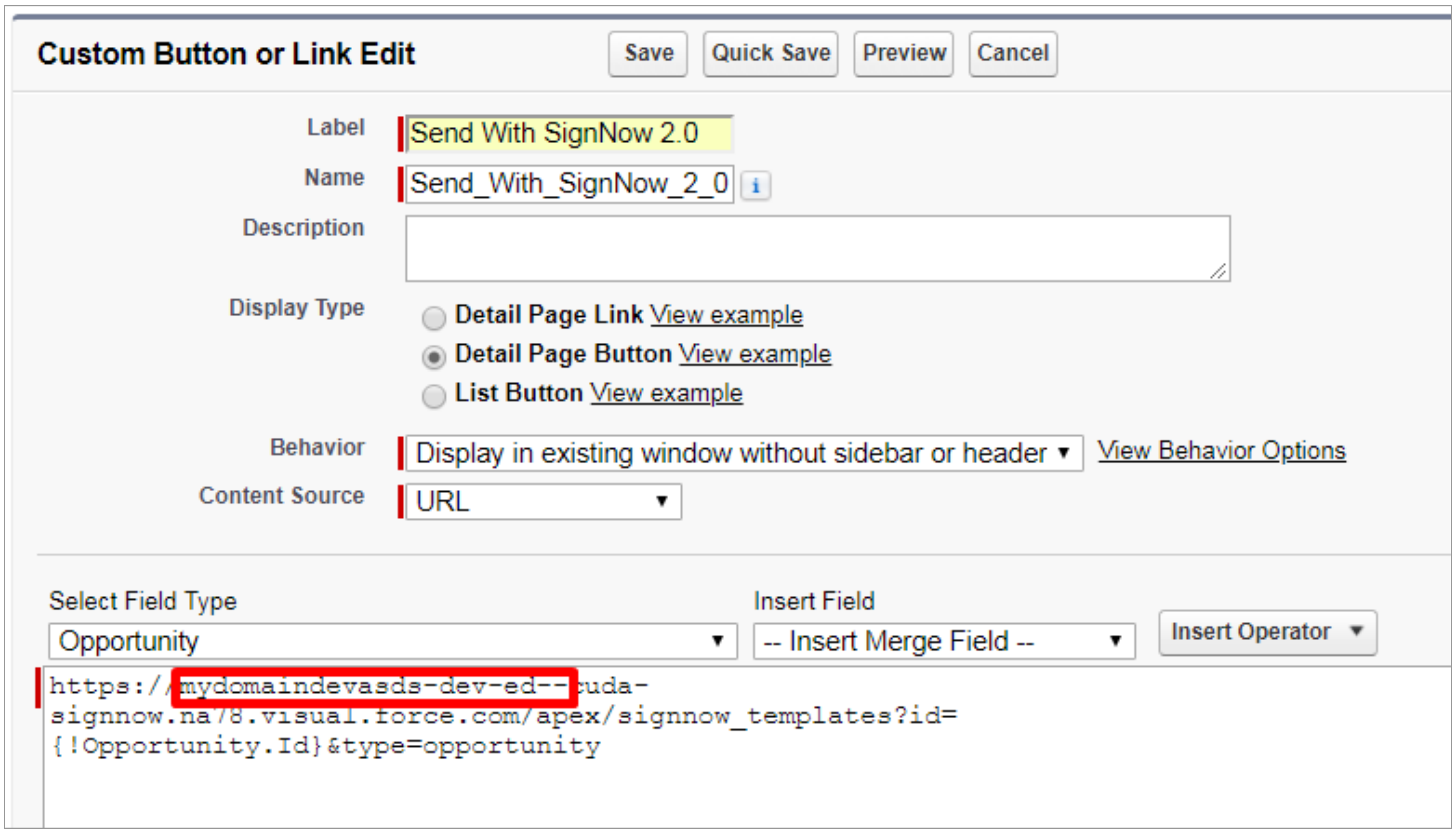
5. Copy your button code to the syntax field.

6.Make sure to use the correct Salesforce instance in the button code (*na73* in the example). Copy your Salesforce instance from the web-browser address bar and paste it to the button code.

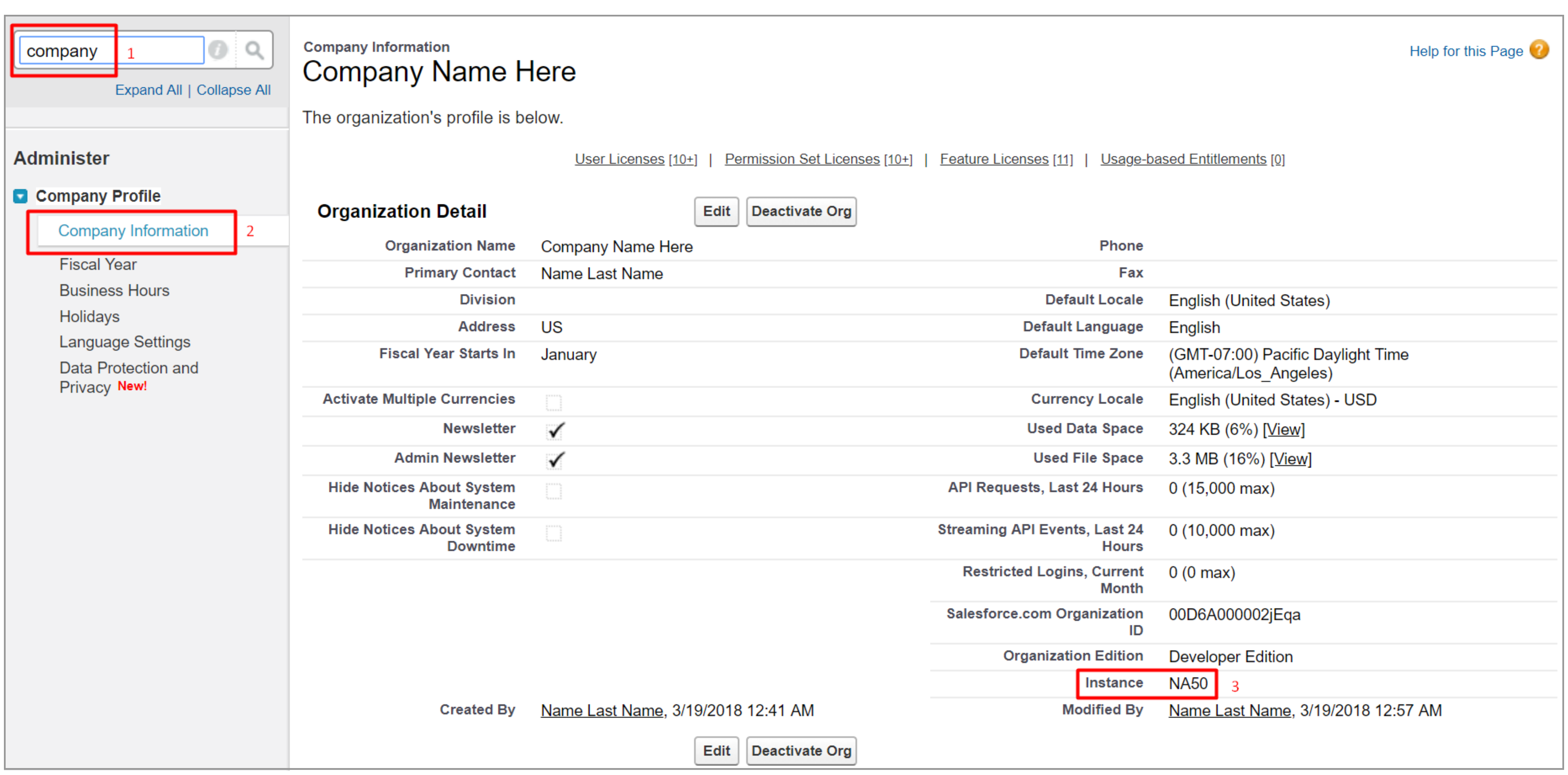
Click *Save* to apply changes.



Note: If My Domain is set in your organization, it should be added to the button code. You can find your domain name in the My Domain section or from the address bar. Copy and paste it right after "https://" and separate it from the rest of the button code with "--".



In this case your Salesforce instance will not be displayed in the URL. To add it to your button code proceed to Setup, select Company Information and find it in the Organisation Details (na50 in the example).

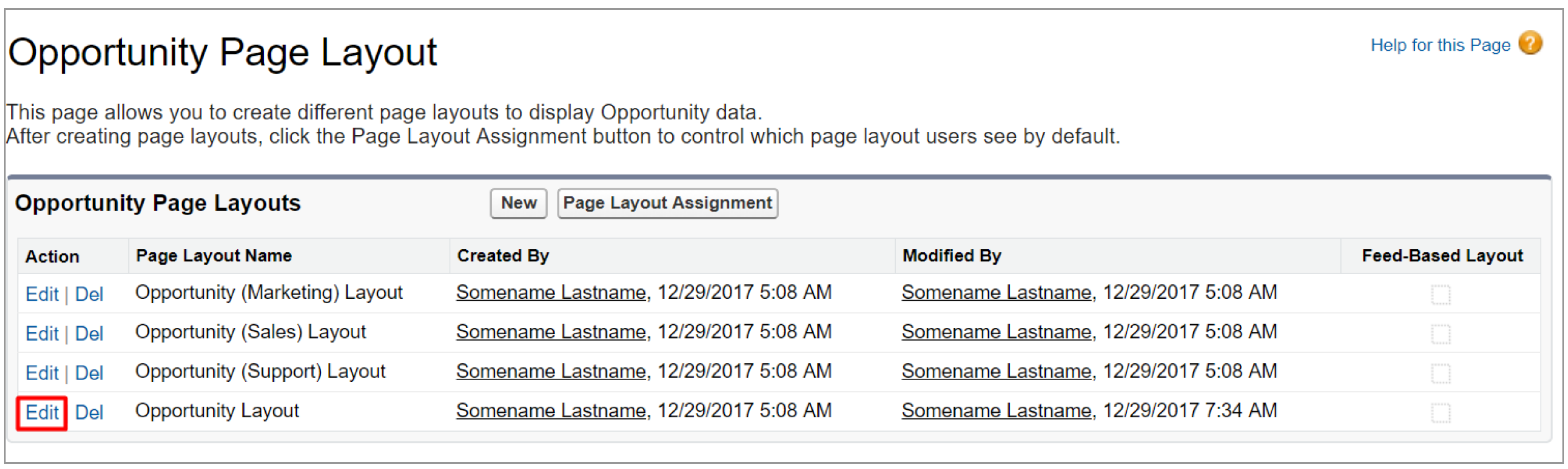


Add the SignNow Buttons to the Object

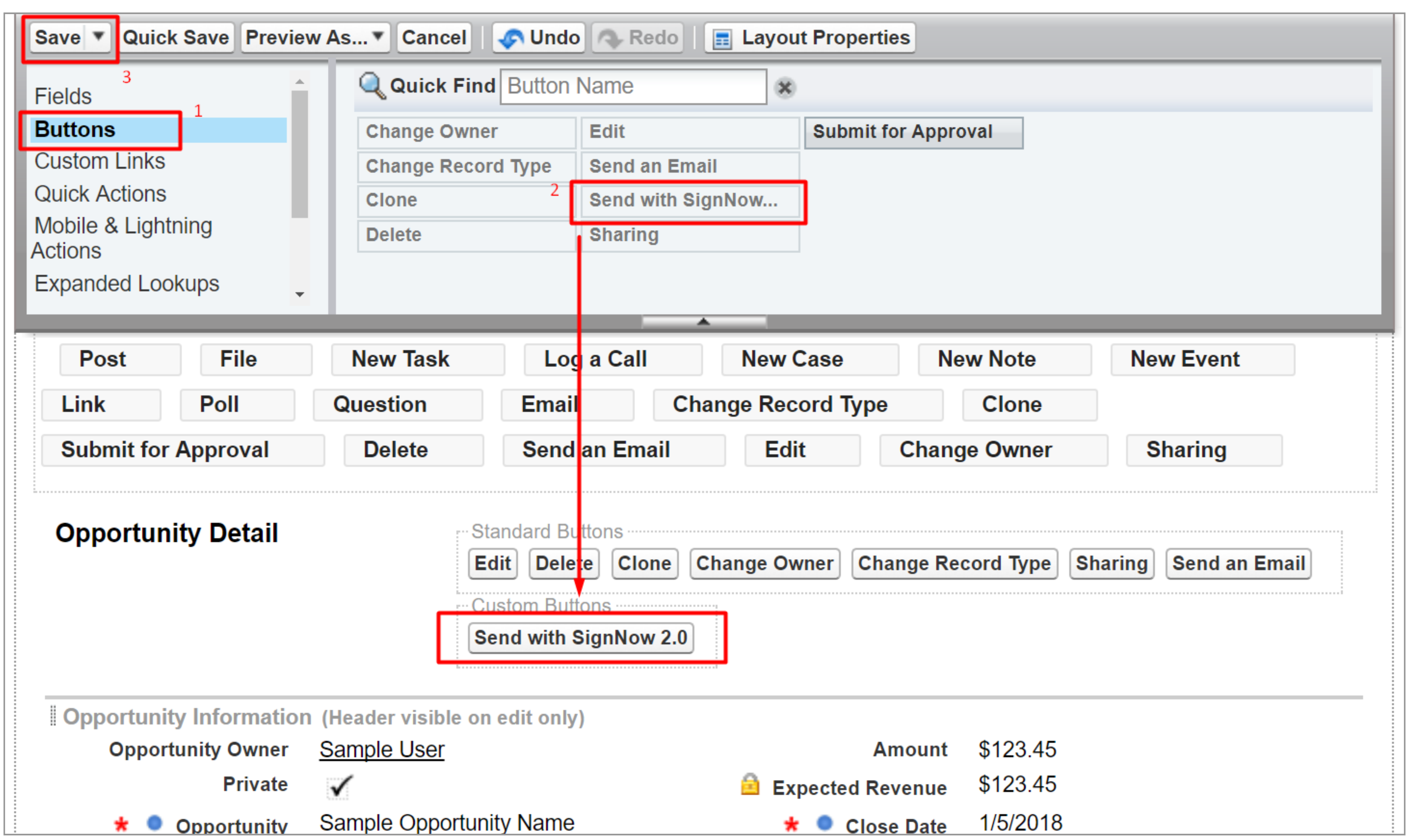
Easily send out your documents for signing directly from your Salesforce organization by adding the SignNow button to your object. Add a SignNow button to each object page layout.

Take a look at how to place the SignNow button on your object page layout.

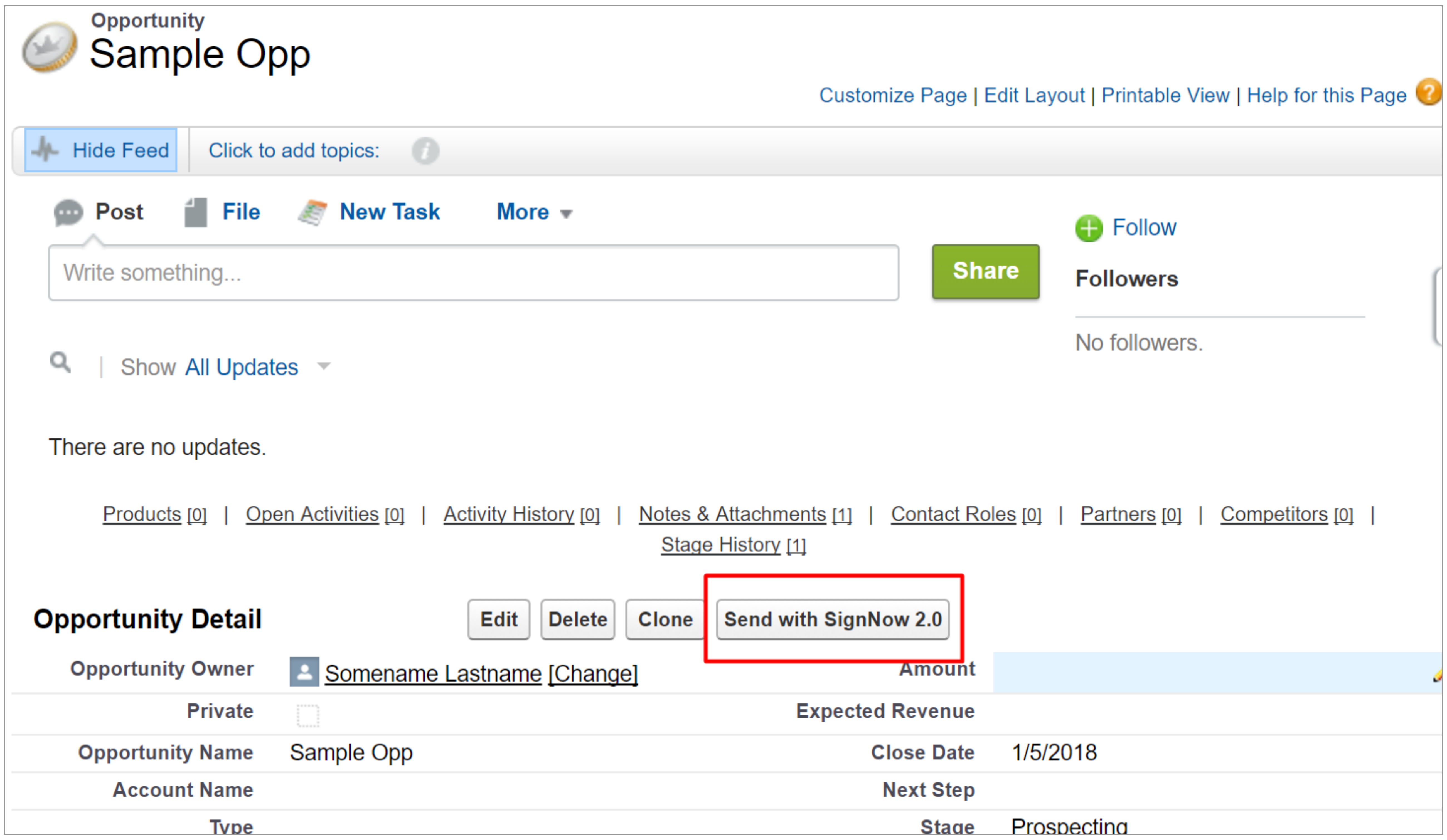
1. Use Quick Find to select your object page layout (Opportunity Page Layout in the example) and click Edit.



2. Select *Buttons* in the Object Page Layout, choose a button (*Send With SignNow* in the example) and then drag and drop it in the *Object details Custom Button* section. Click *Save* to apply changes.

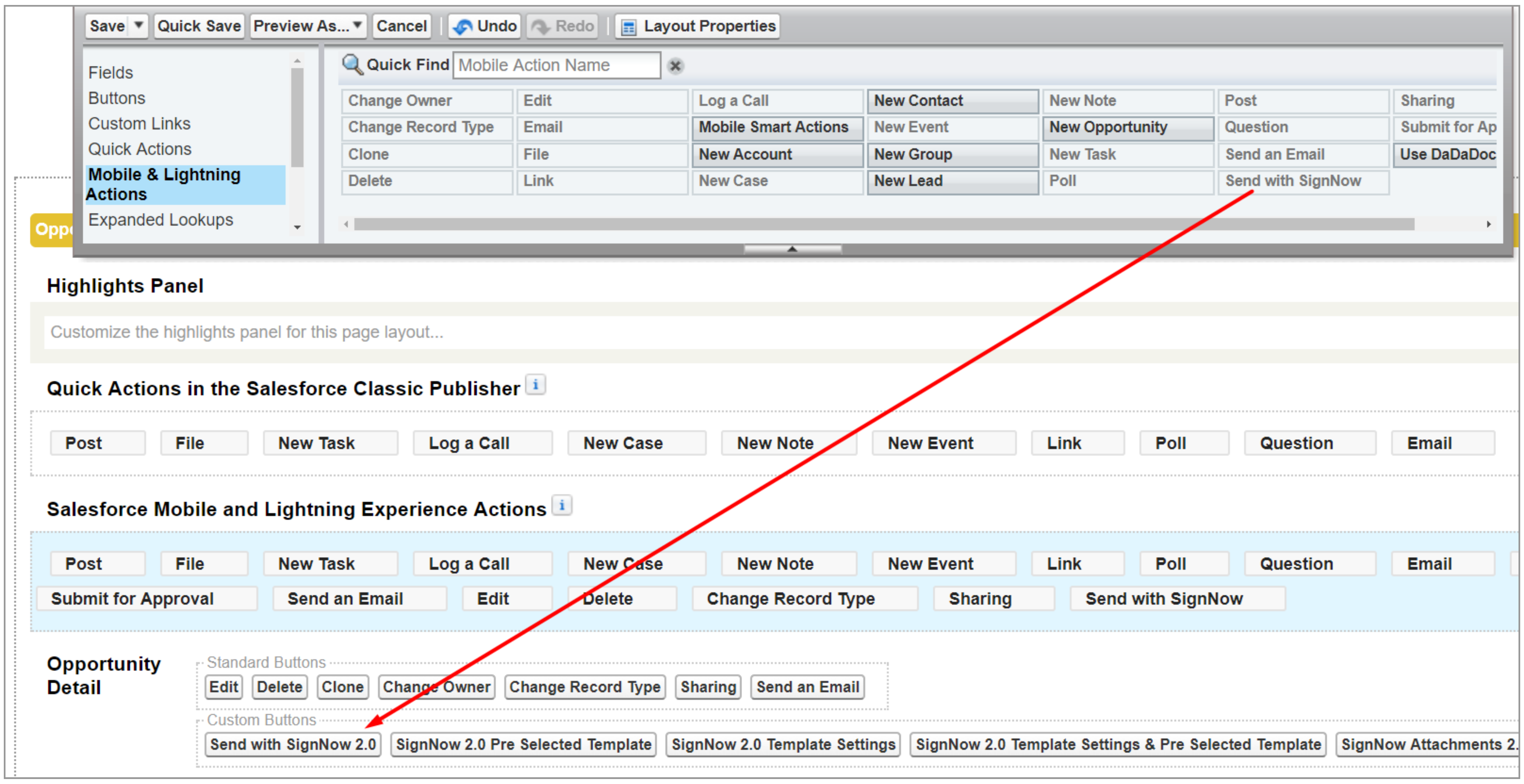


Now your SignNow custom button is ready to use directly from your object record page.



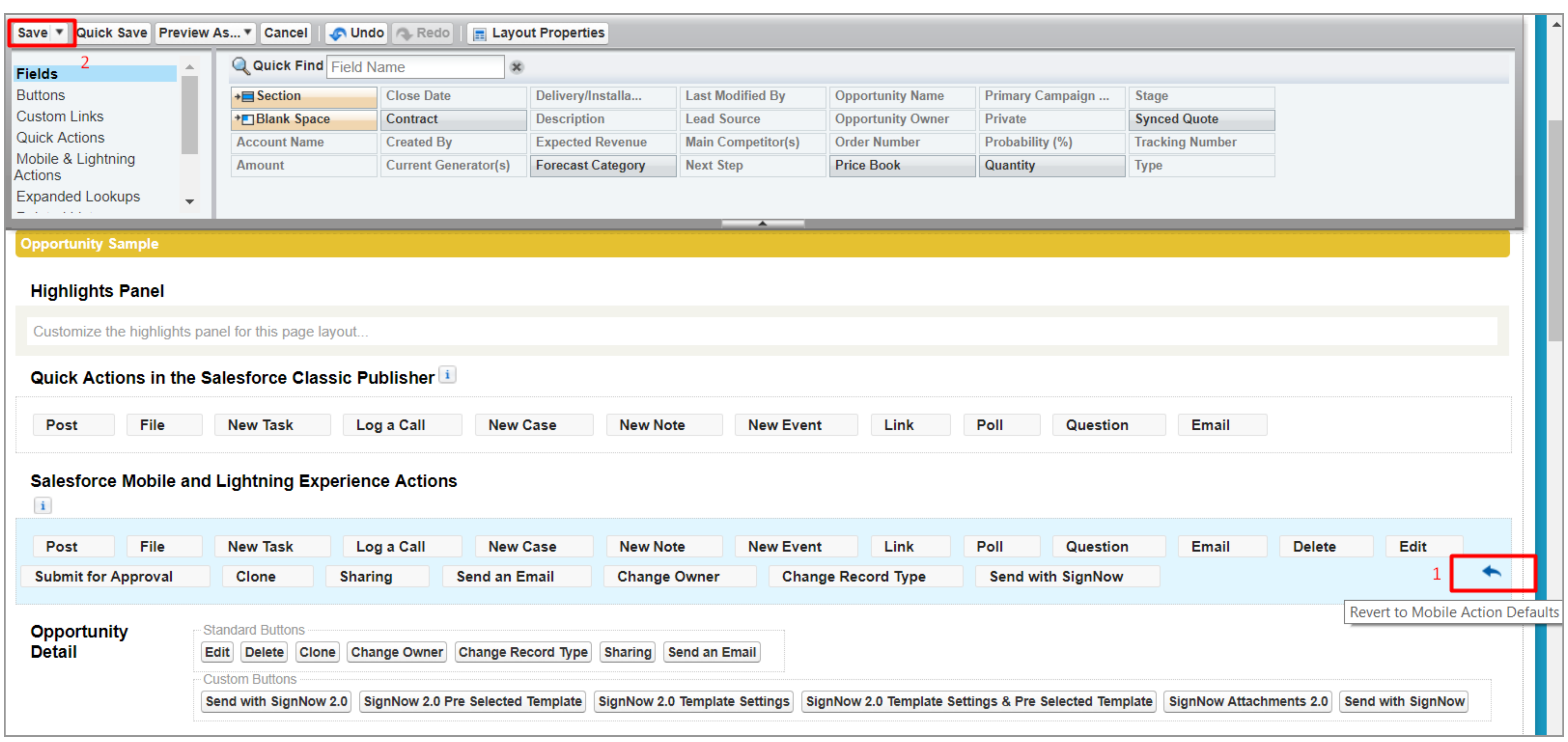
Note: If your SignNow button hasn't appeared in your object page when running Salesforce Lightning, follow the steps below to enable it.

On your object page layout (Contact Layout in the example) select *Mobile and Lightning Actions*, find your SignNow button and drag and drop it to the Salesforce Mobile and Lightning Experience Actions section. Click *Save* to apply the settings.

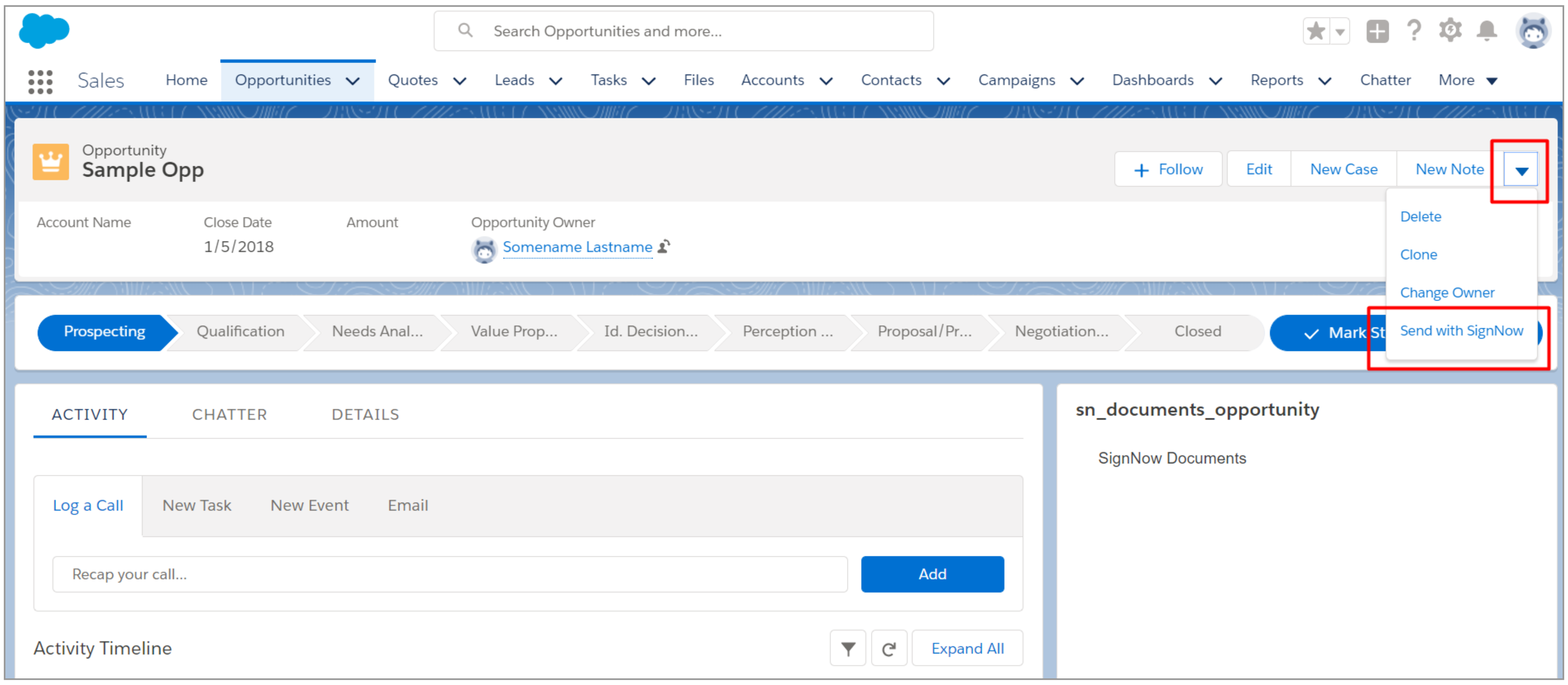


Alternatively, on your object page layout, find the Salesforce Mobile and Lightning Experience Actions section and click *Revert to the Mobile Actions Default*. Click *Save*.

Note that reverting to default may affect your custom settings in this section.



Now your SignNow custom button is ready to use directly from your object record page in Salesforce Lightning.



SignNow Buttons Codes and Usage

Note that the following button code examples (except SignNow Quotes) are designed for the Opportunity object. Make sure to change the current object name in the code marked with blue. The object name is case-sensitive.

Send with SignNow

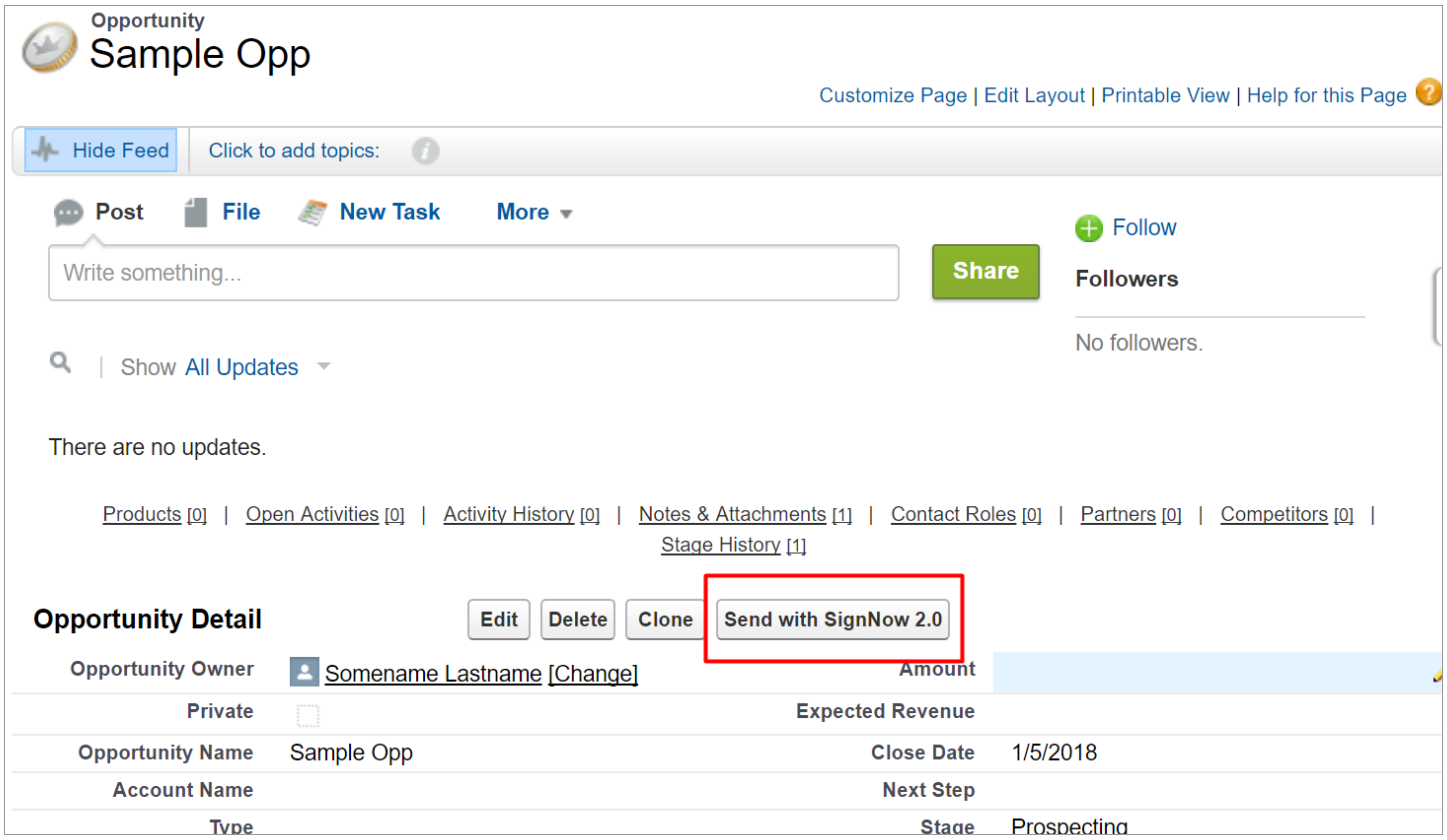
Button Code:

```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Opportunity.Id}
&type=opportunity
```

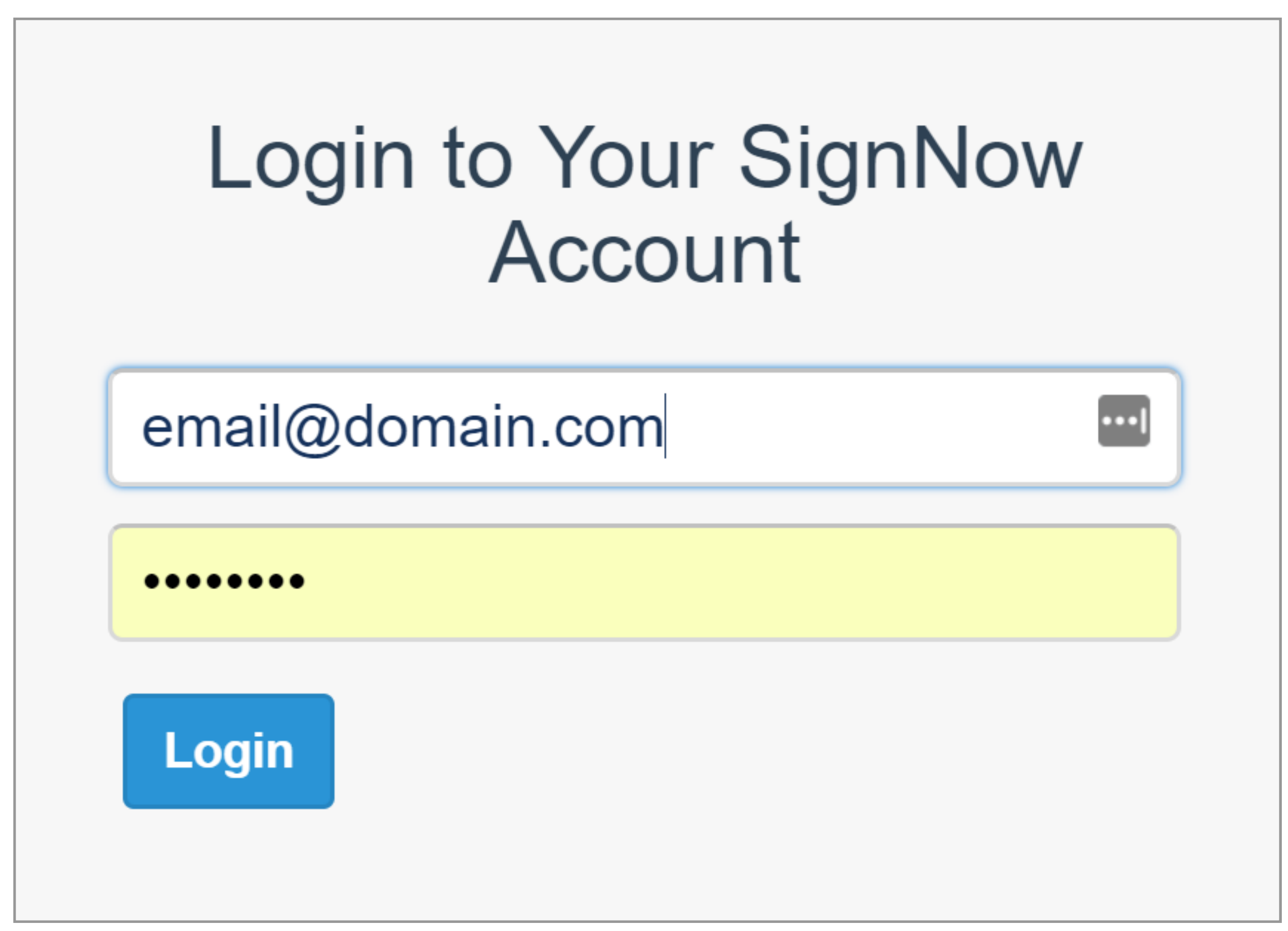
Usage:

Send a Document or a Group of Documents for Signature with the Send with SignNow Button.

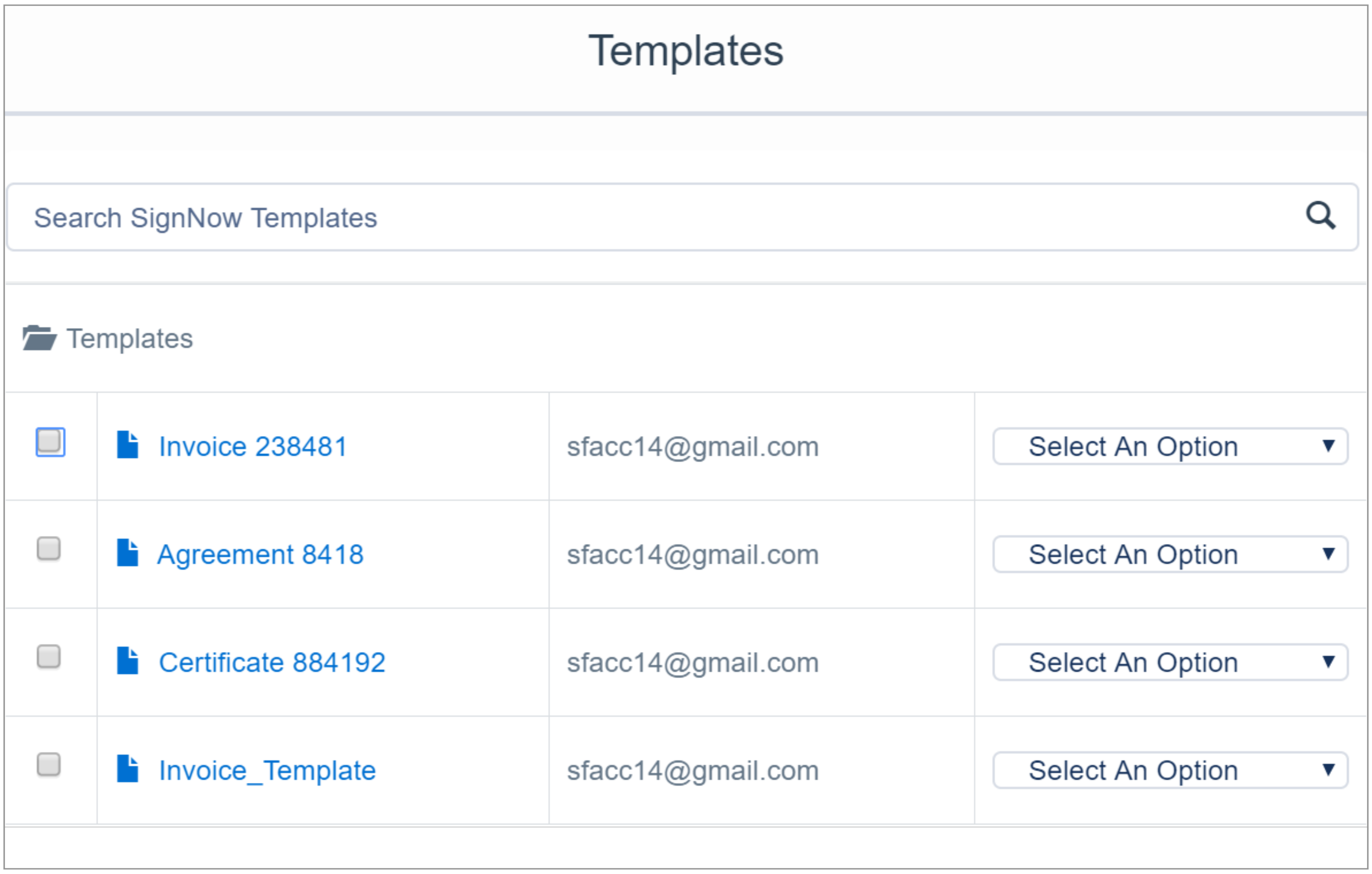
1. In your object click on the *Send with SignNow* button.



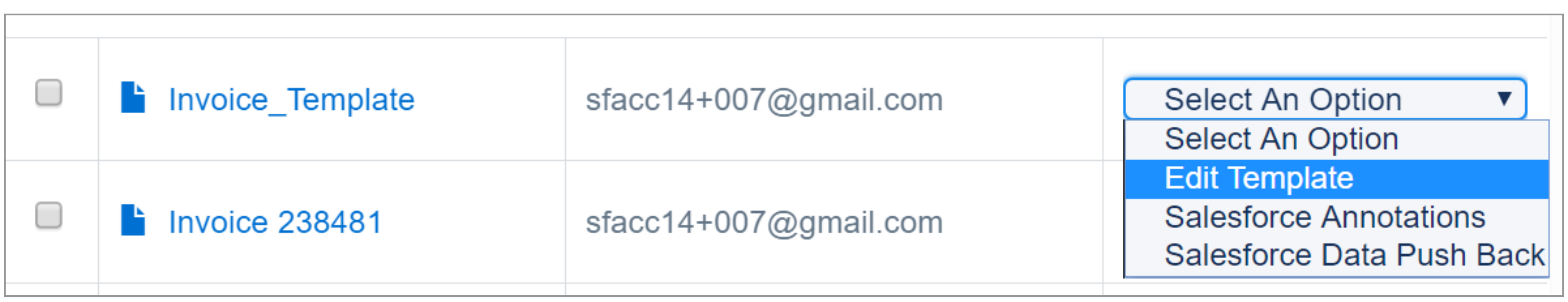
2. If you are not logged in to SignNow, you will be able to log in with your existing credentials. If you don't have a SignNow account, complete the simple registration process on https://www.signnow.com/ and then log in with your credentials.



3. Click on a template you would like to send from the list.

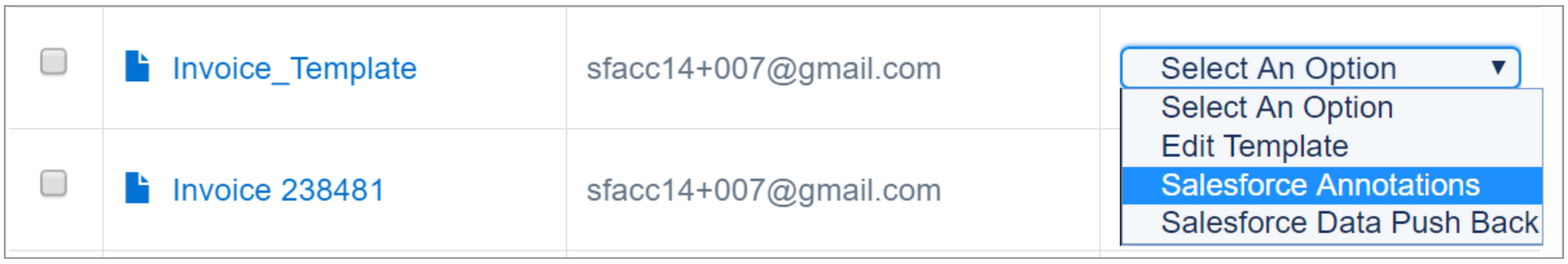


3.1. Alternatively, from the options dropdown menu select *Edit Template* to edit the template in SignNow (add fillable fields, checkboxes, radio buttons, etc.) if you would like to edit it before sending.

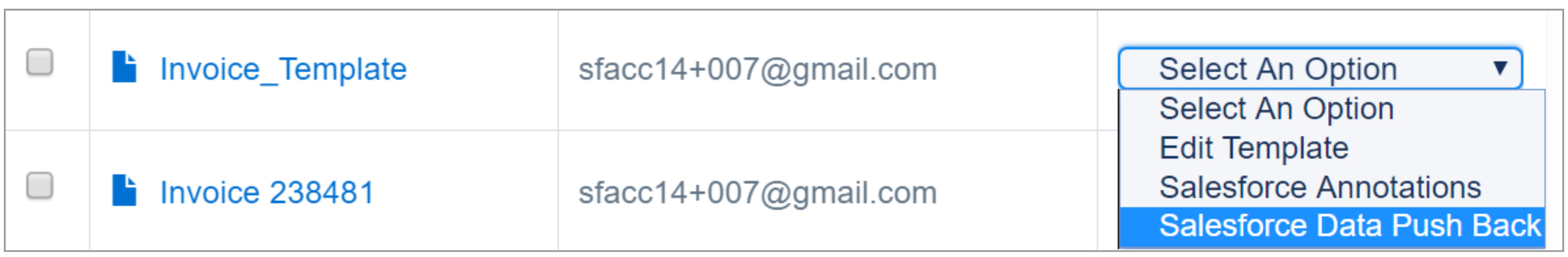


Note that you should reload your SignNow application by clicking Reload each time after you have edited a document to make changes apply.

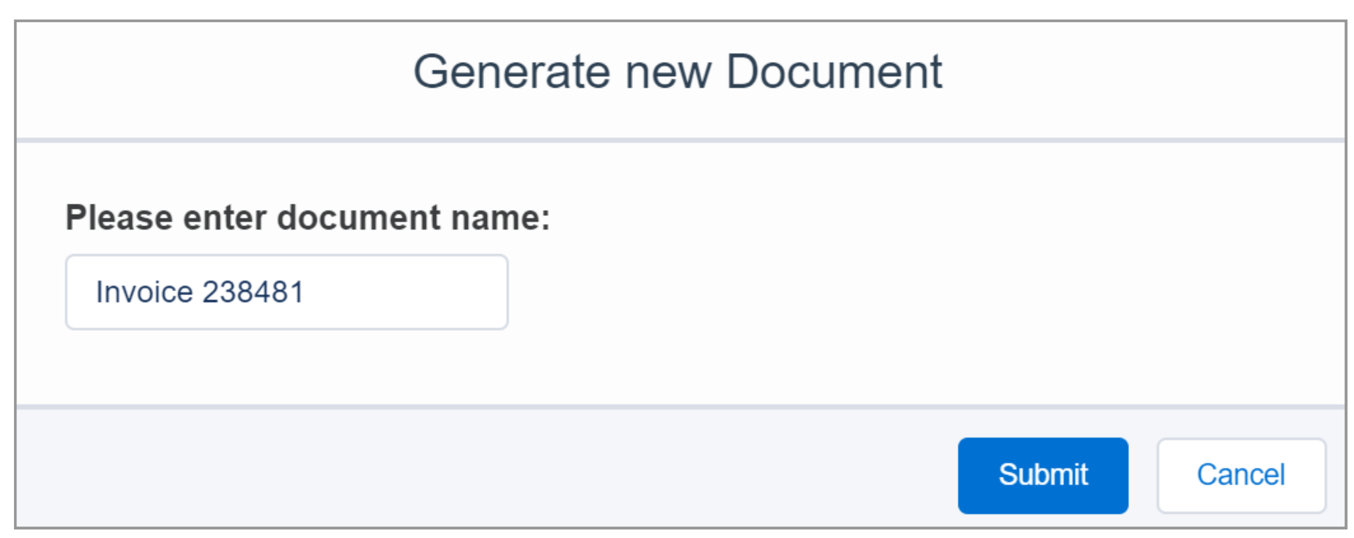
Select *Salesforce Annotations* to add Salesforce annotation fields to your document in SignNow if needed.



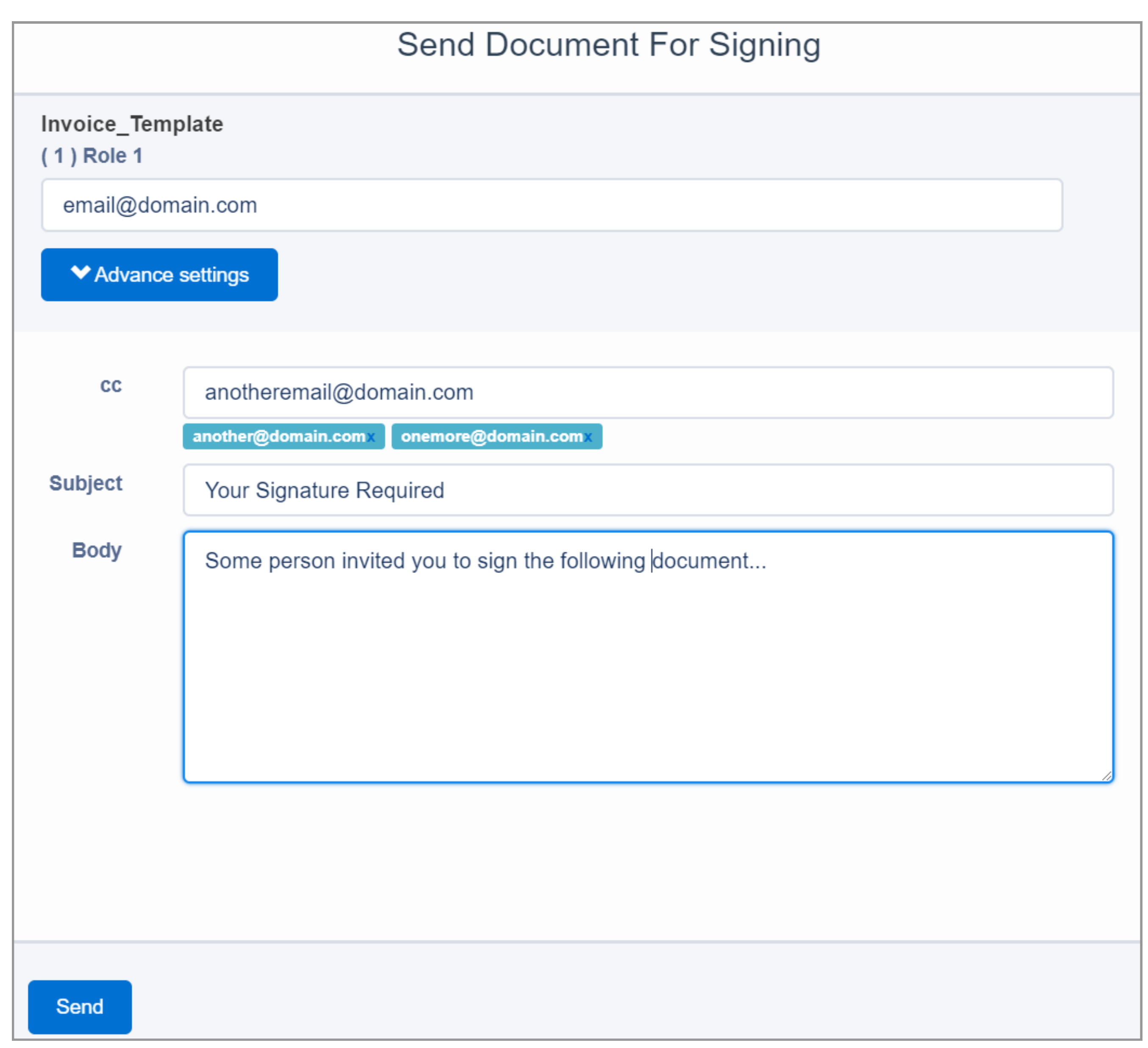
Select *Salesforce Data Binding* to pre-fill the template with data form the Salesforce record or to update the Salesforce record's fields when the document is filled.



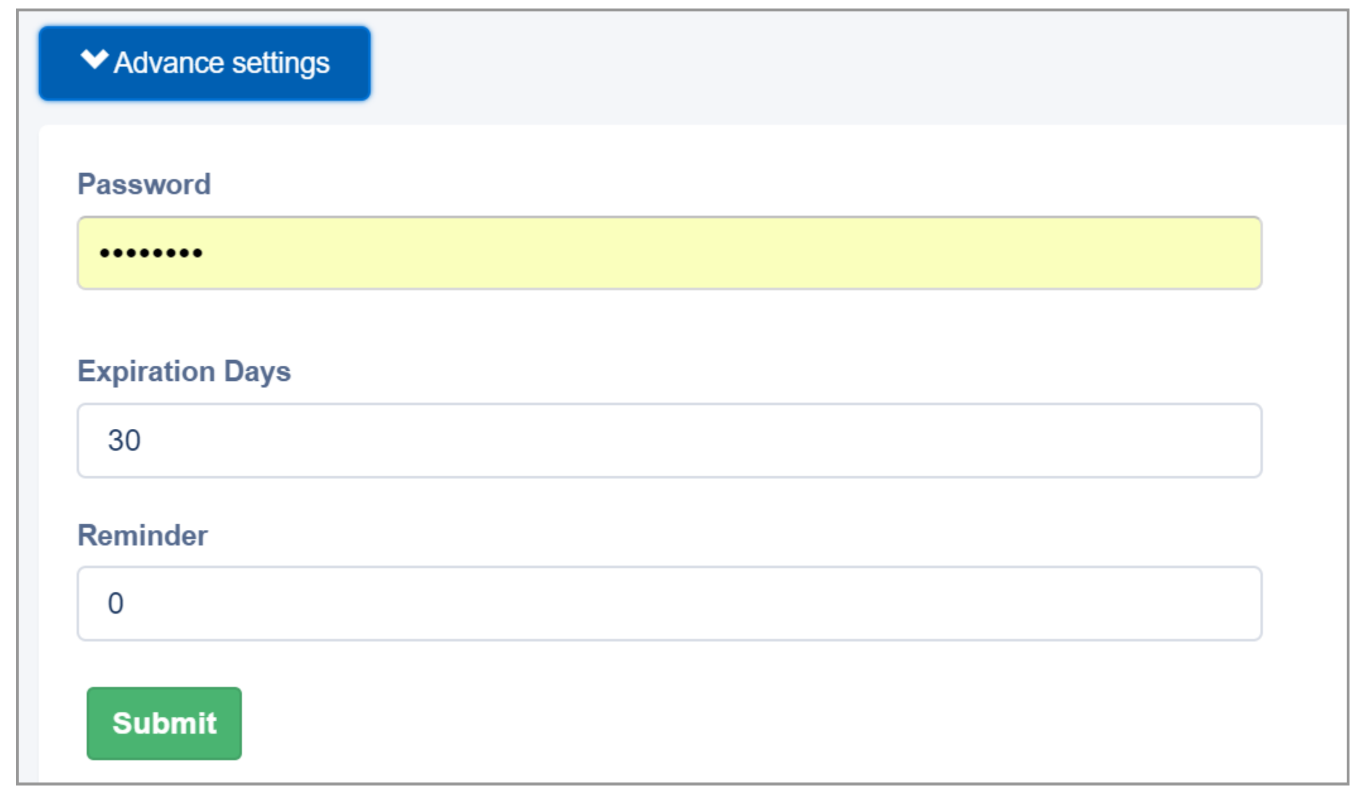
4. Enter a name for the document being generated and click *Submit*.



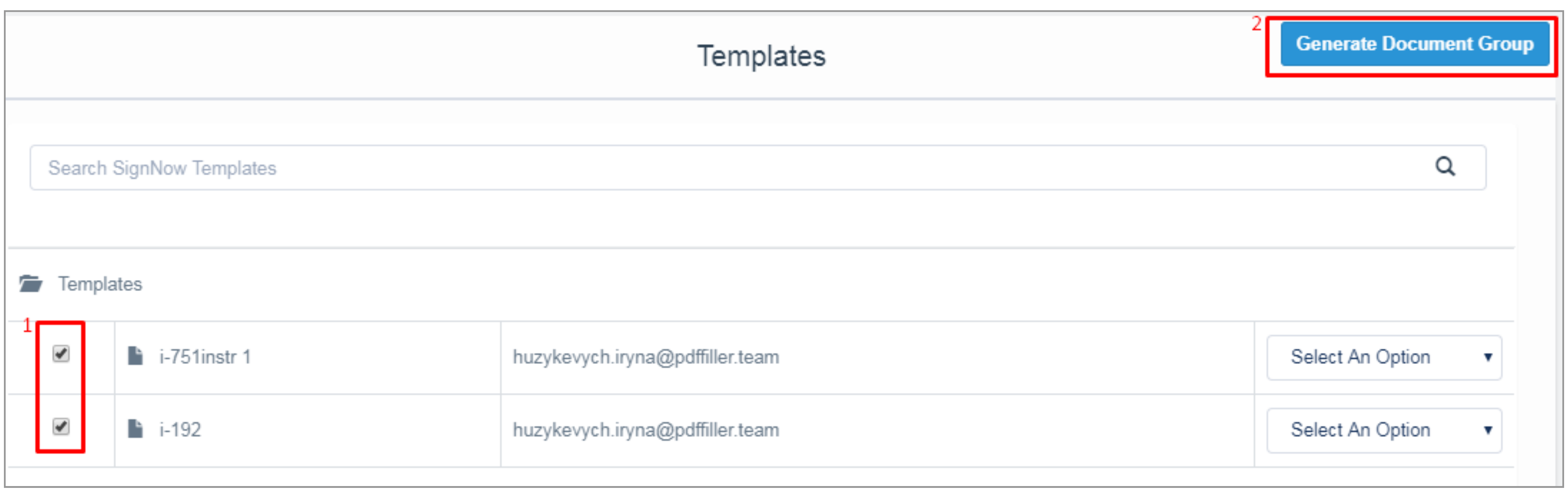
5. Enter a recipient's email, specify recipients in the CC field who will get a notification once a document has been signed, add a subject and body if needed and then click *Send*.



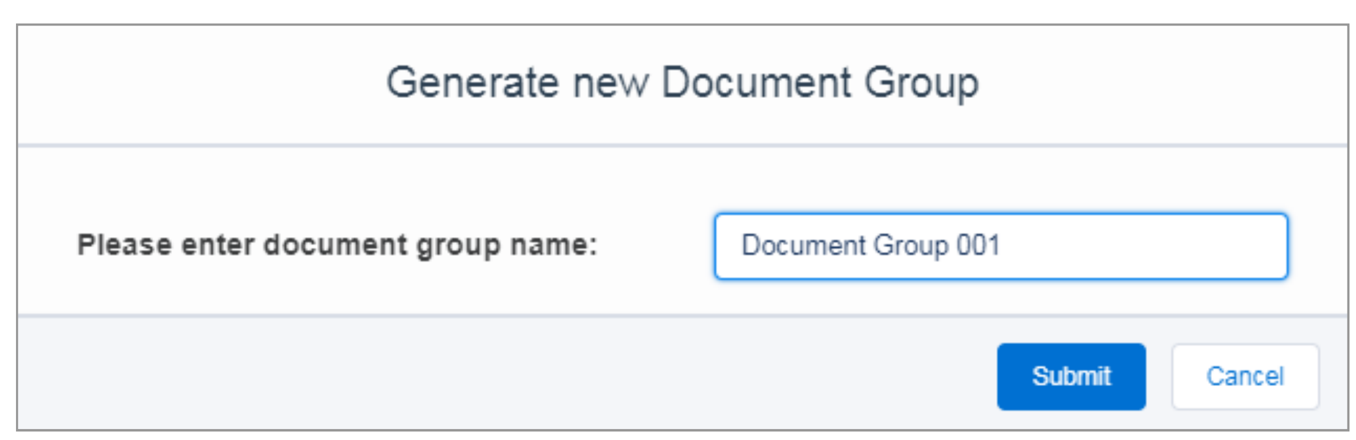
5.1. Use Advanced settings to password protect your document, set an expiration date and enable reminders for your recipients.



6. To send a group of documents select several documents by checking the boxes next to them and click *Generate Document Group.*



Enter a name for your document group and click *Submit*.

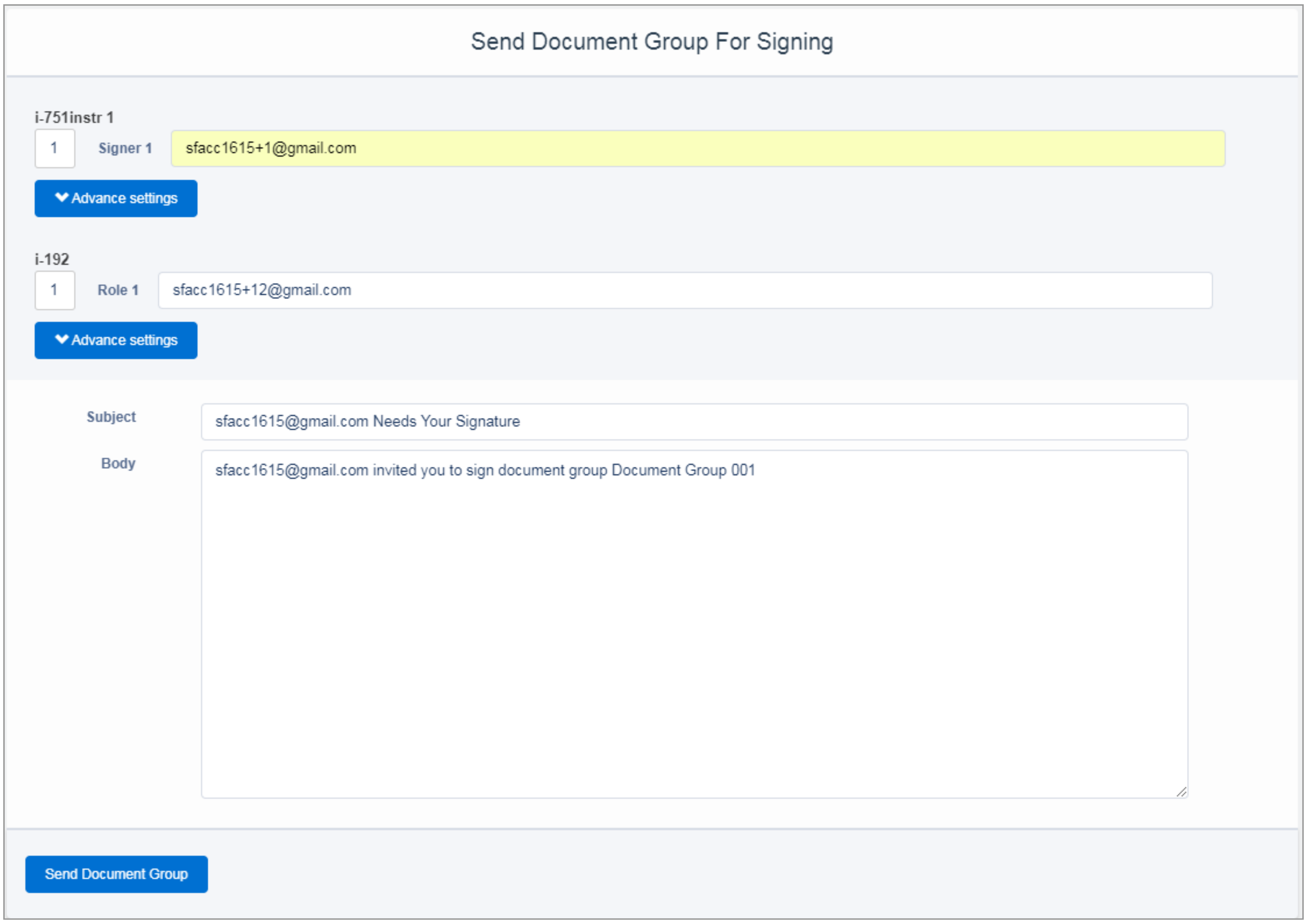


Enter recipient email addresses and add a custom subject and body if needed.

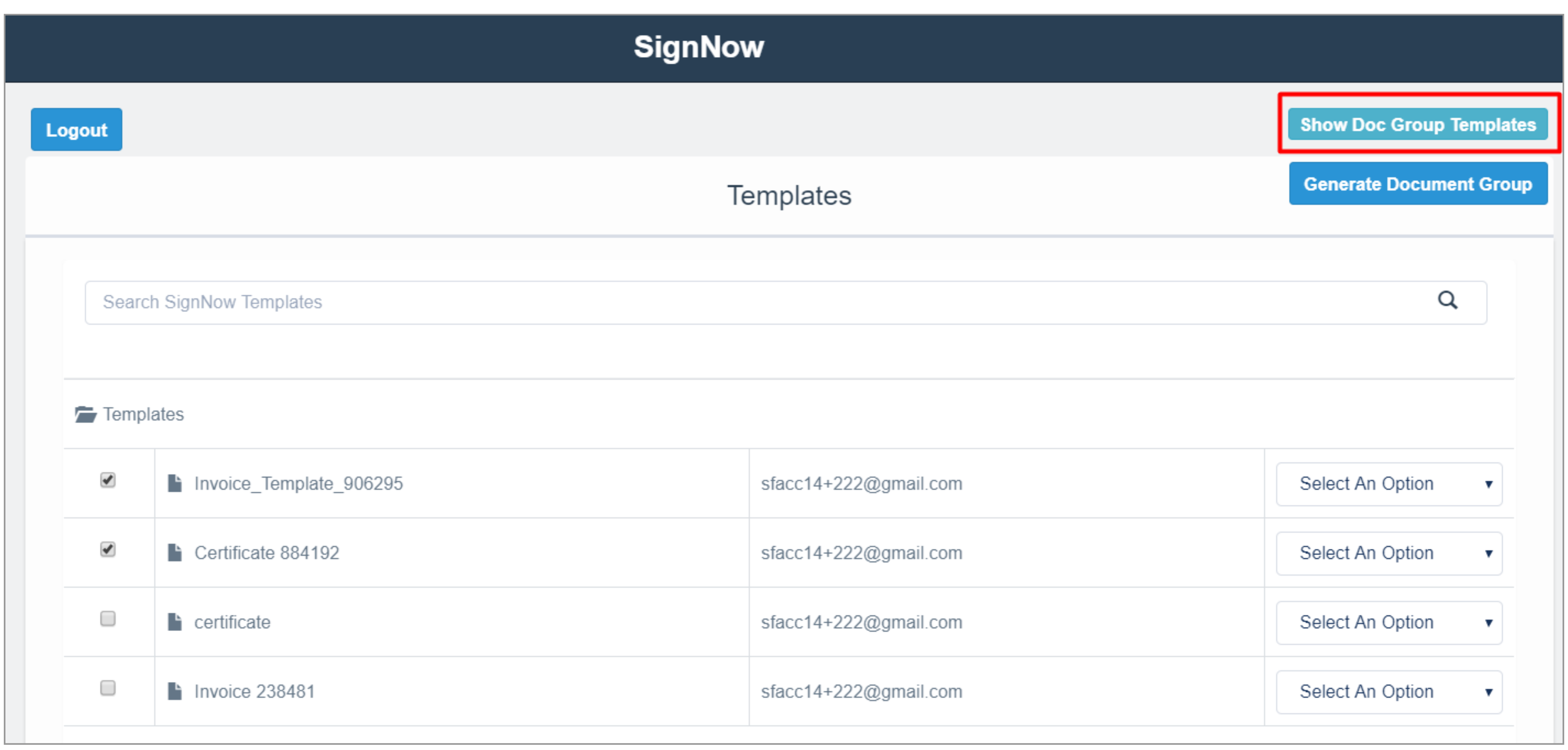
Specify the order your signature requests will be sent in by selecting the value next to the Signers. All subsequent requests will be sent after the previous recipient has signed the document.

Use Advanced settings to password protect your document, set an expiration date and enable reminders for your recipients.

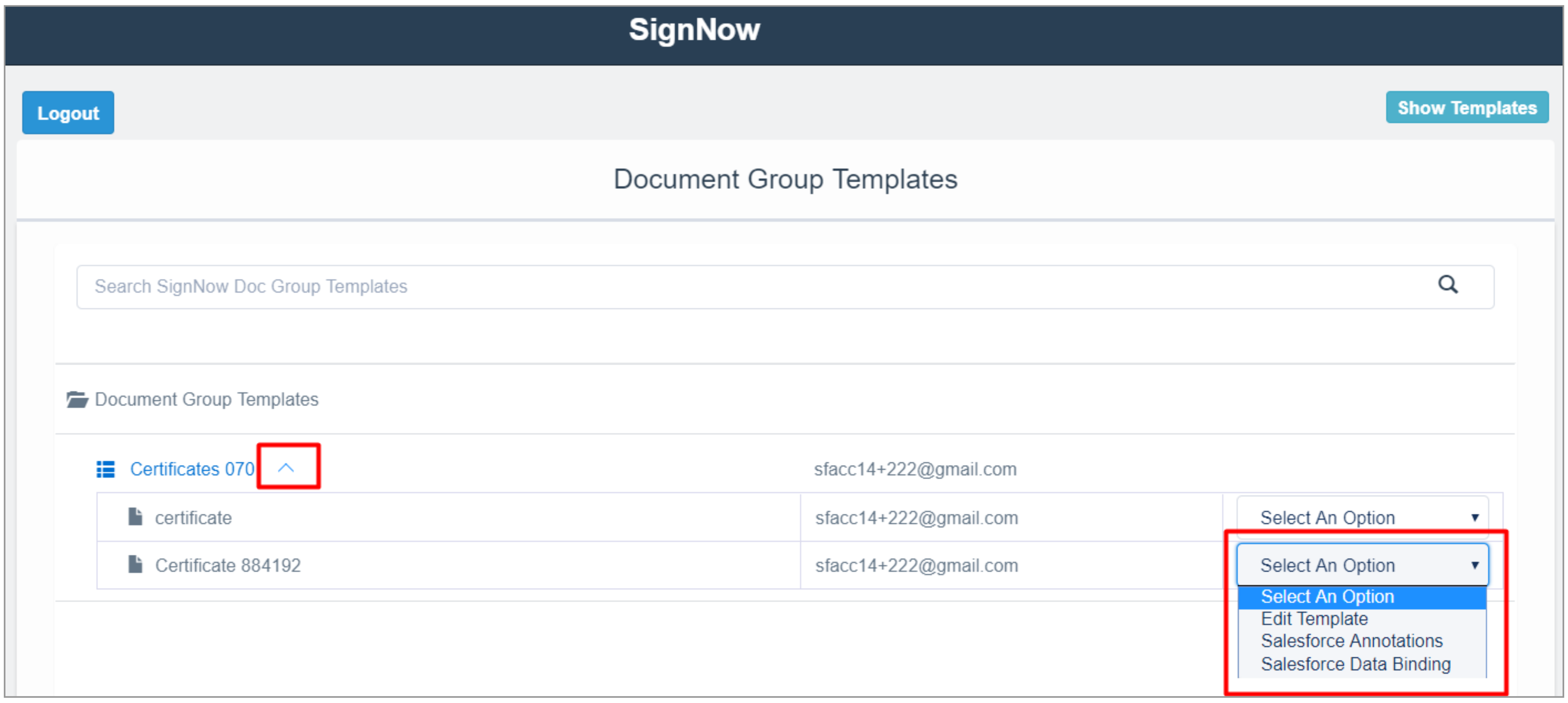
When done, click Send Document Group.



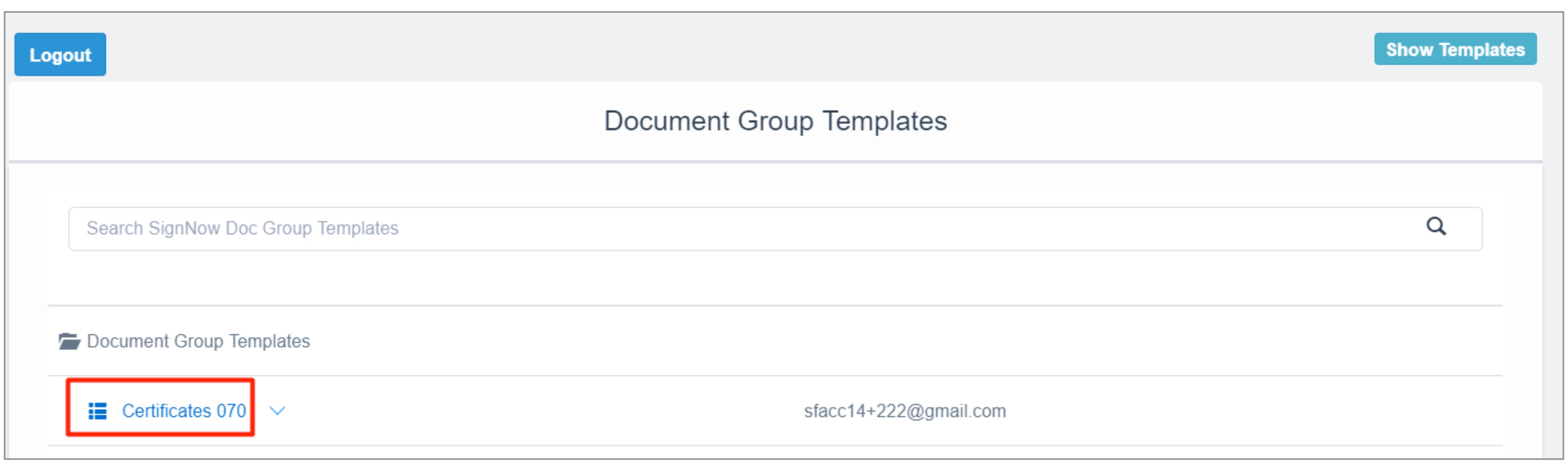
Click *Show Document Group Template* to proceed to your SignNow Document Group Templates list.



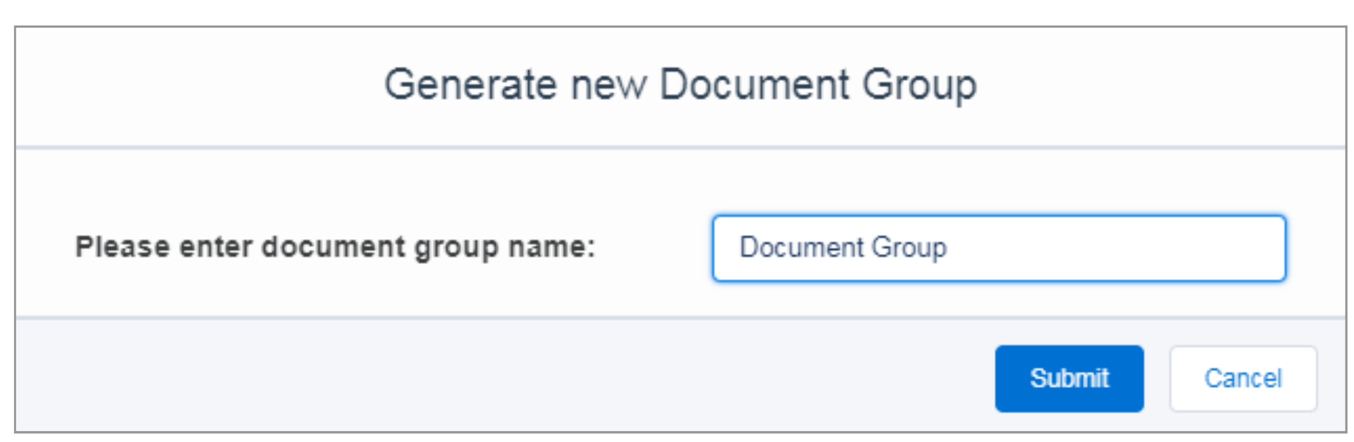
You can edit any of the templates in the group, add Salesforce annotations or bind data before sending it. Click on the drop-down arrow next to a proper template and select an option you would like to use.



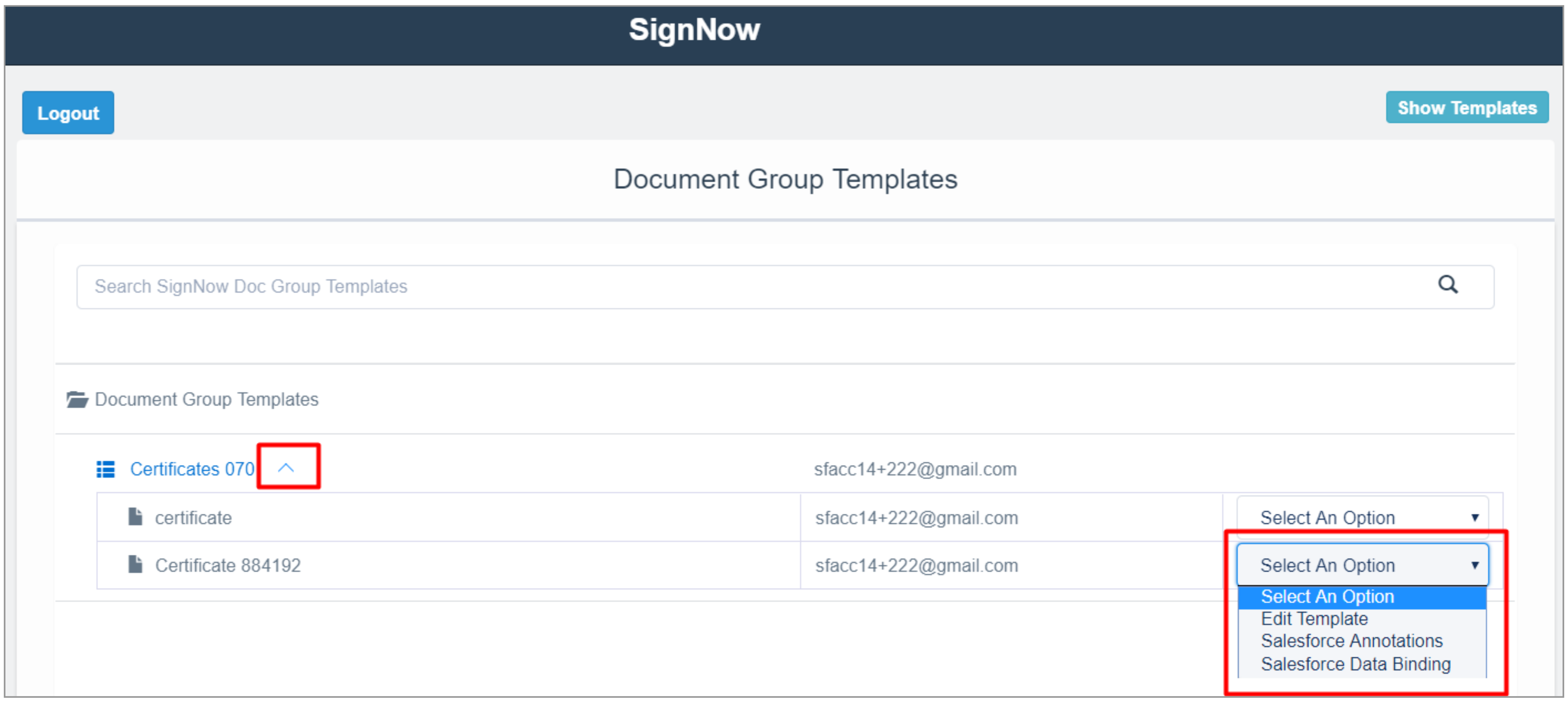
To send a signature request for a Document Group Template, click on it.



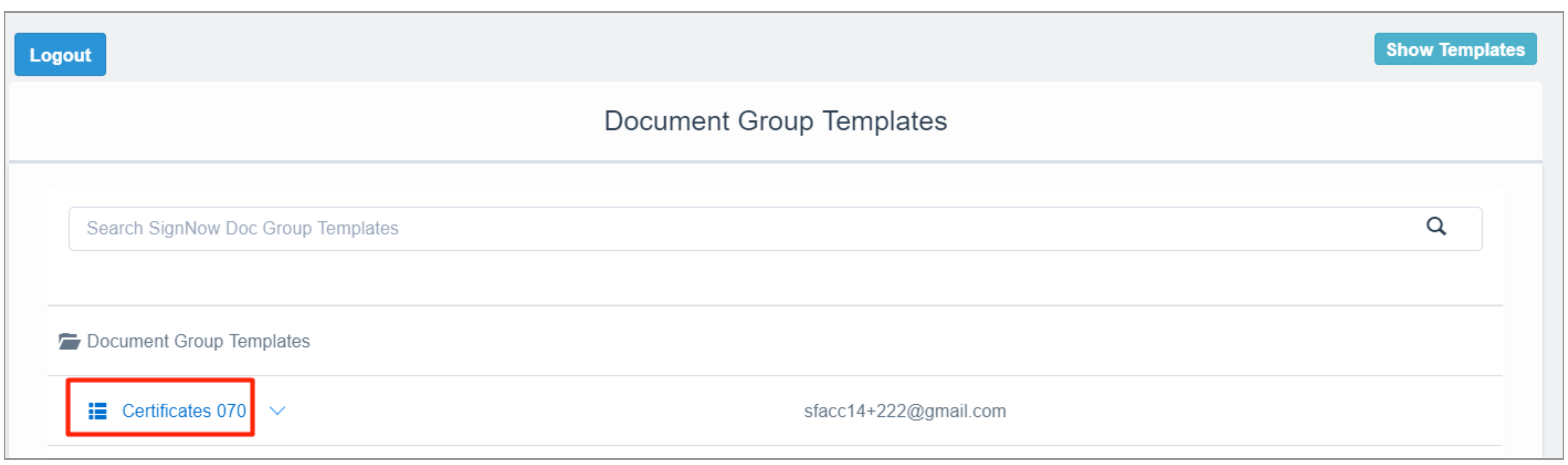
Enter the name for your document group and click *Submit*. Note that you should add proper fillable fields and set roles for all templates in the group first, otherwise the new document group won't be generated.



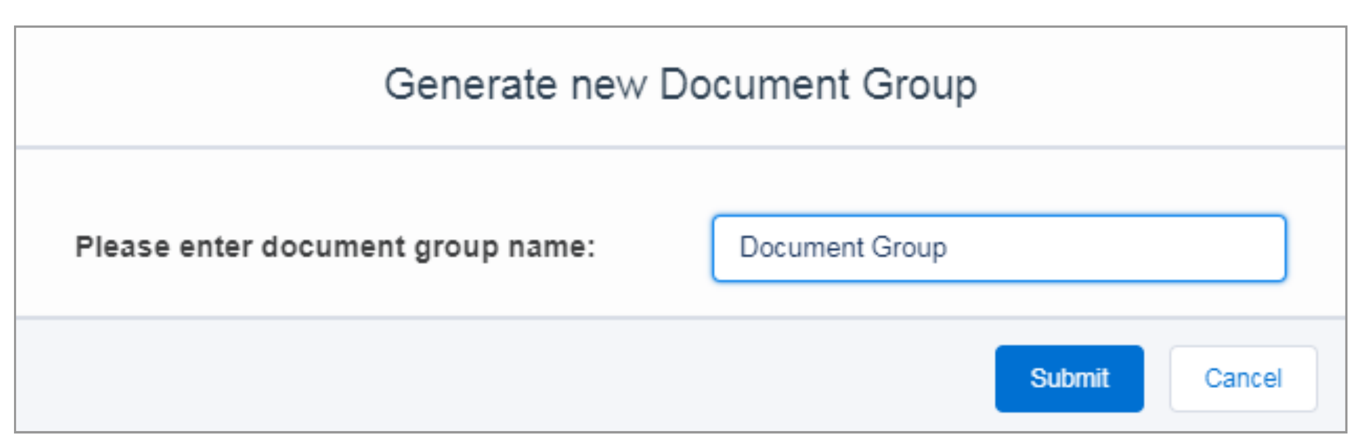
You can edit any of the templates in the group, add Salesforce annotations or bind data before sending it. Click on the drop-down arrow next to a proper template and select an option you would like to use.



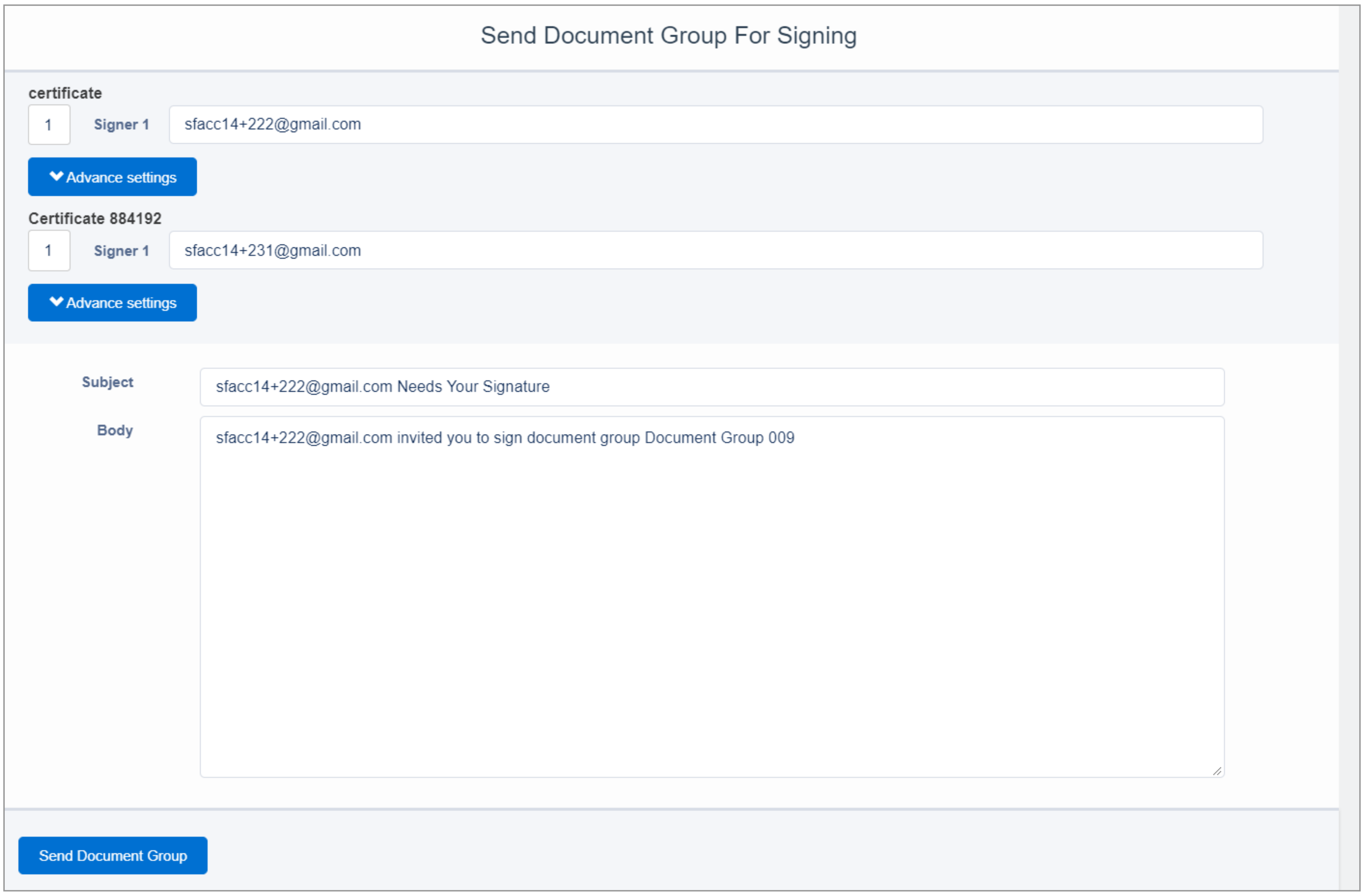
To send a signature request for a Document Group Template, click on it.



Enter the name for your document group and click *Submit*. Note that you should add proper fillable fields and set roles for all templates in the group first, otherwise the new document group won't be generated.



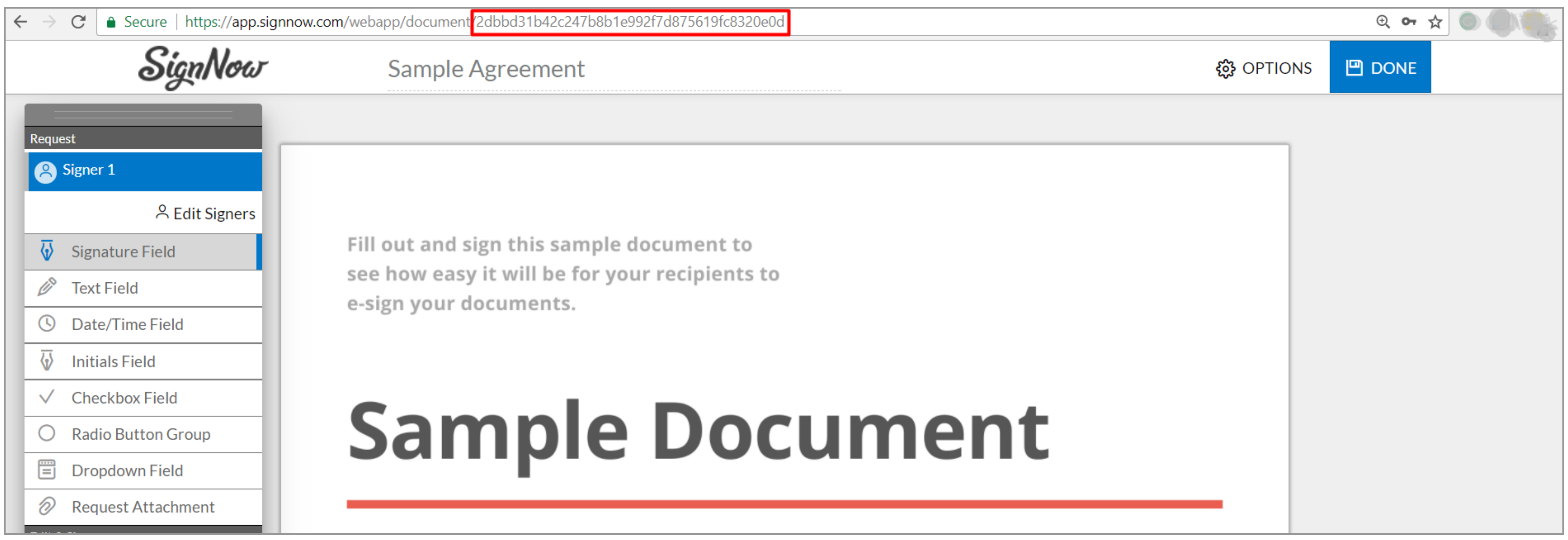
Change or add emails, set advanced settings, add a custom subject and body if needed. When done, click *Send Document Group*.



SignNow Pre Selected Template

Button Code:

Note that for the SignNow Pre Selected Template button to work correctly, you should replace `sn template id` in the button code (highlighted in yellow) with your SignNow template ID. To retrieve your SignNow template ID, open the template and copy the template ID from the URL.

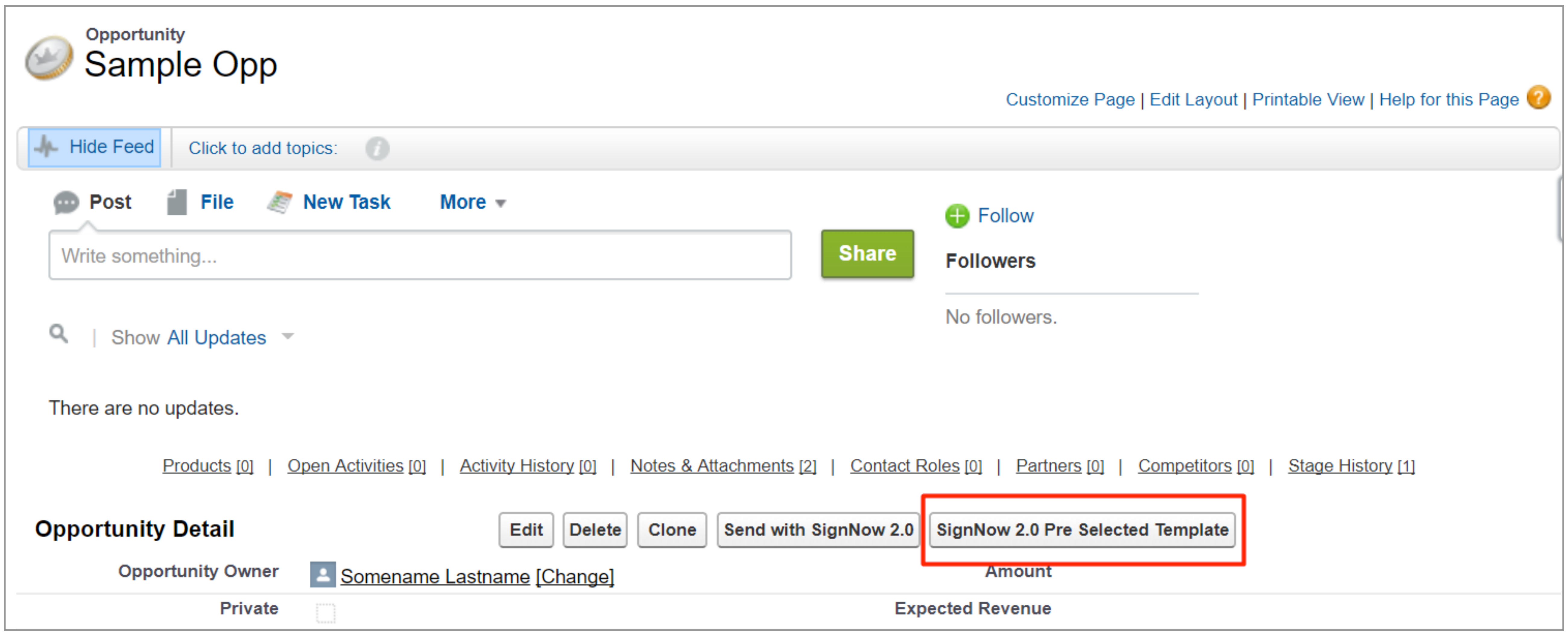



```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Opportunity.Id}
&type=opportunity&template_id=sn template id
```

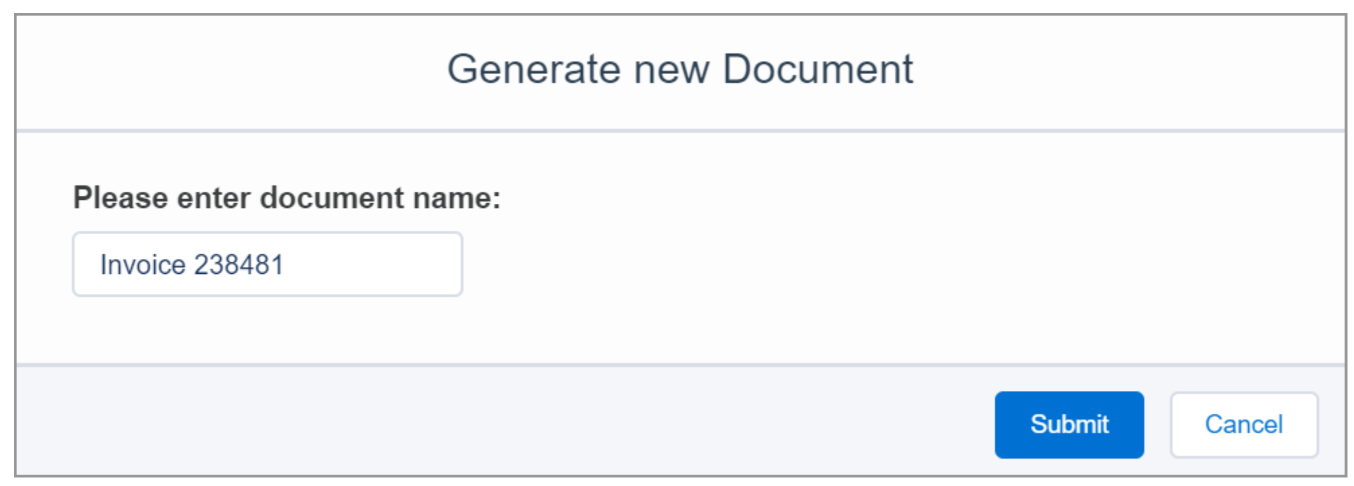
Usage:

Send a Preselected Template for Signature with the SignNow Pre Selected Template Button.

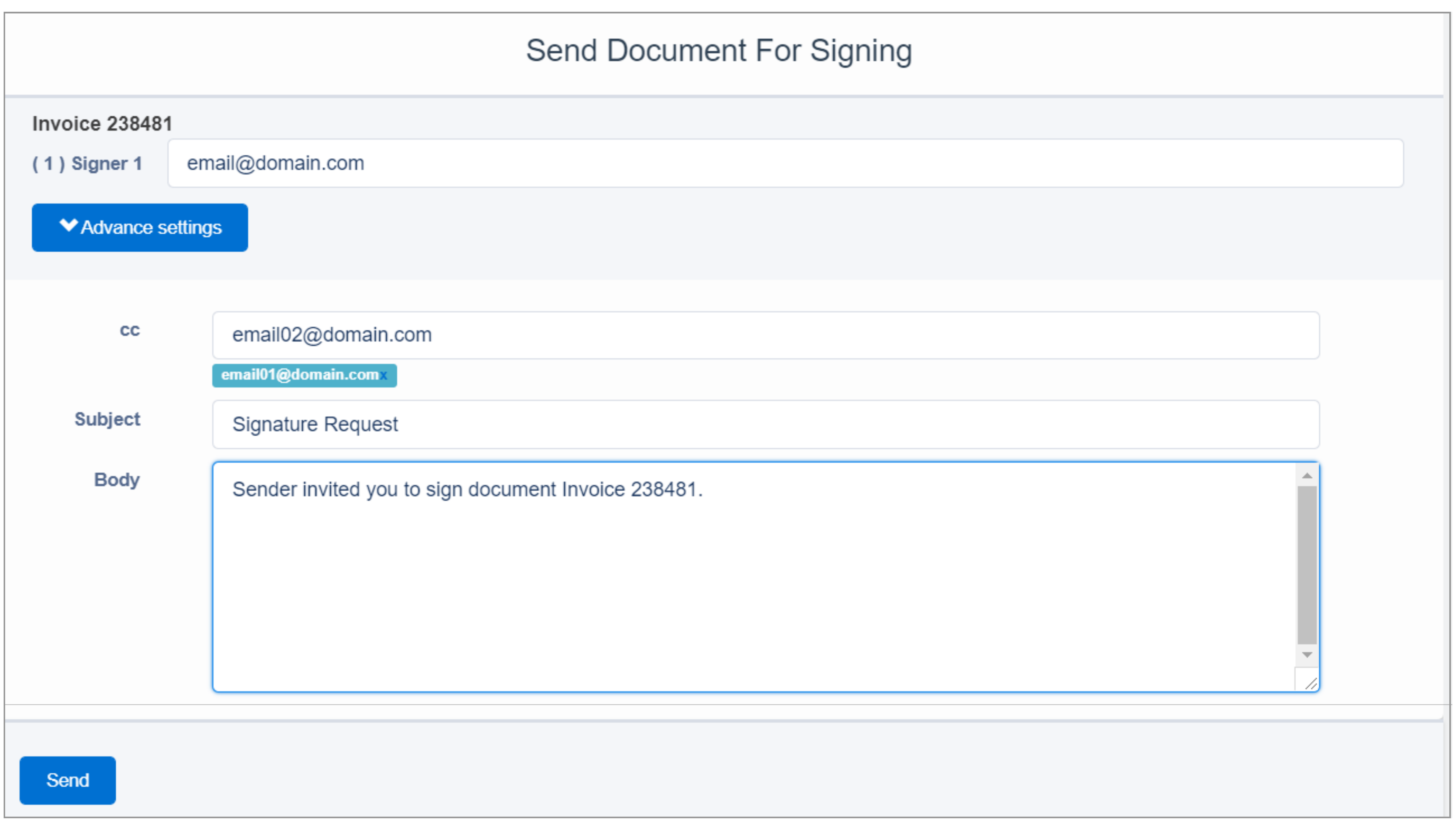
1. In your object click the *SignNow Pre Selected Template* button.



2. The SignNow application will open with a pop-up asking to enter a name for the document that will be generated from the template. Enter a name for the document and click *Submit* to proceed.

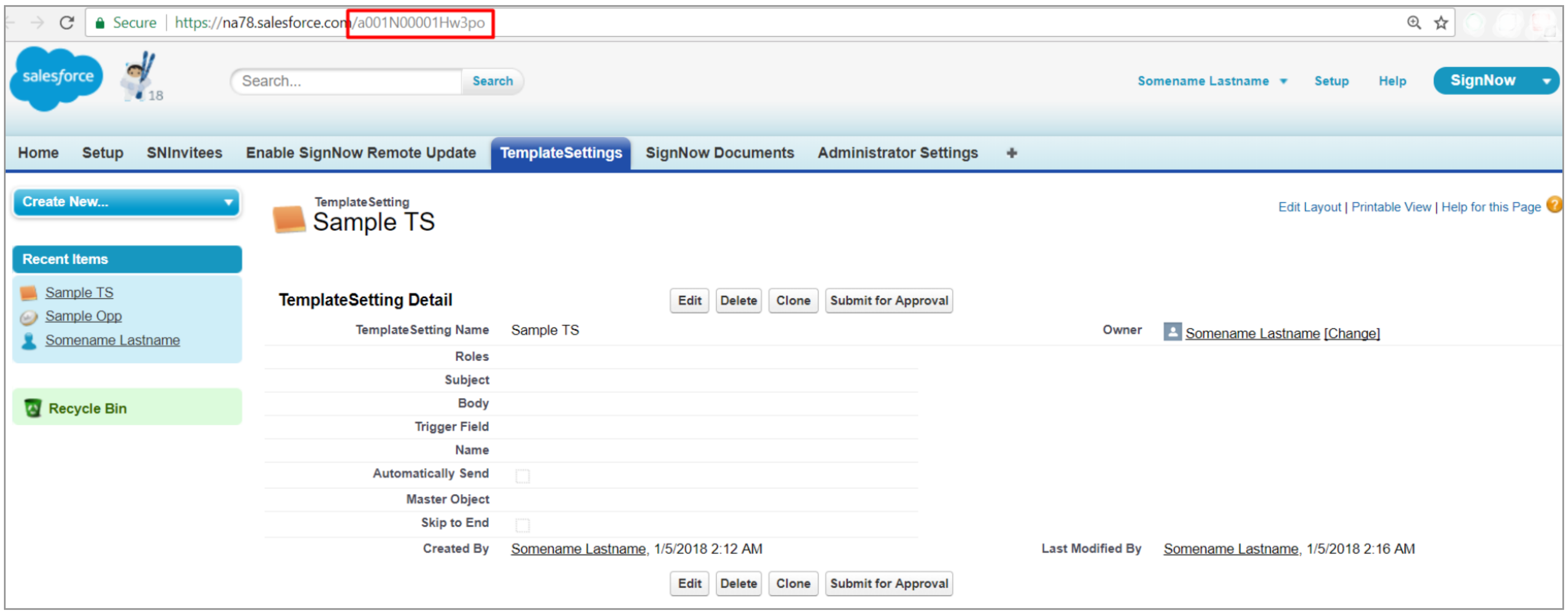


3. Enter recipient details and click Send to send the document out for signing. Use Advanced Settings to password protect your document as well as set an expiration date and reminder.



SignNow Template Settings

Note that for the SignNow Template Settings button to work correctly, you should replace `sf template setting id` in the button code (highlighted in yellow) with your Salesforce Template Setting ID. To get the template setting ID, open or create a setting and copy the ID from the URL.



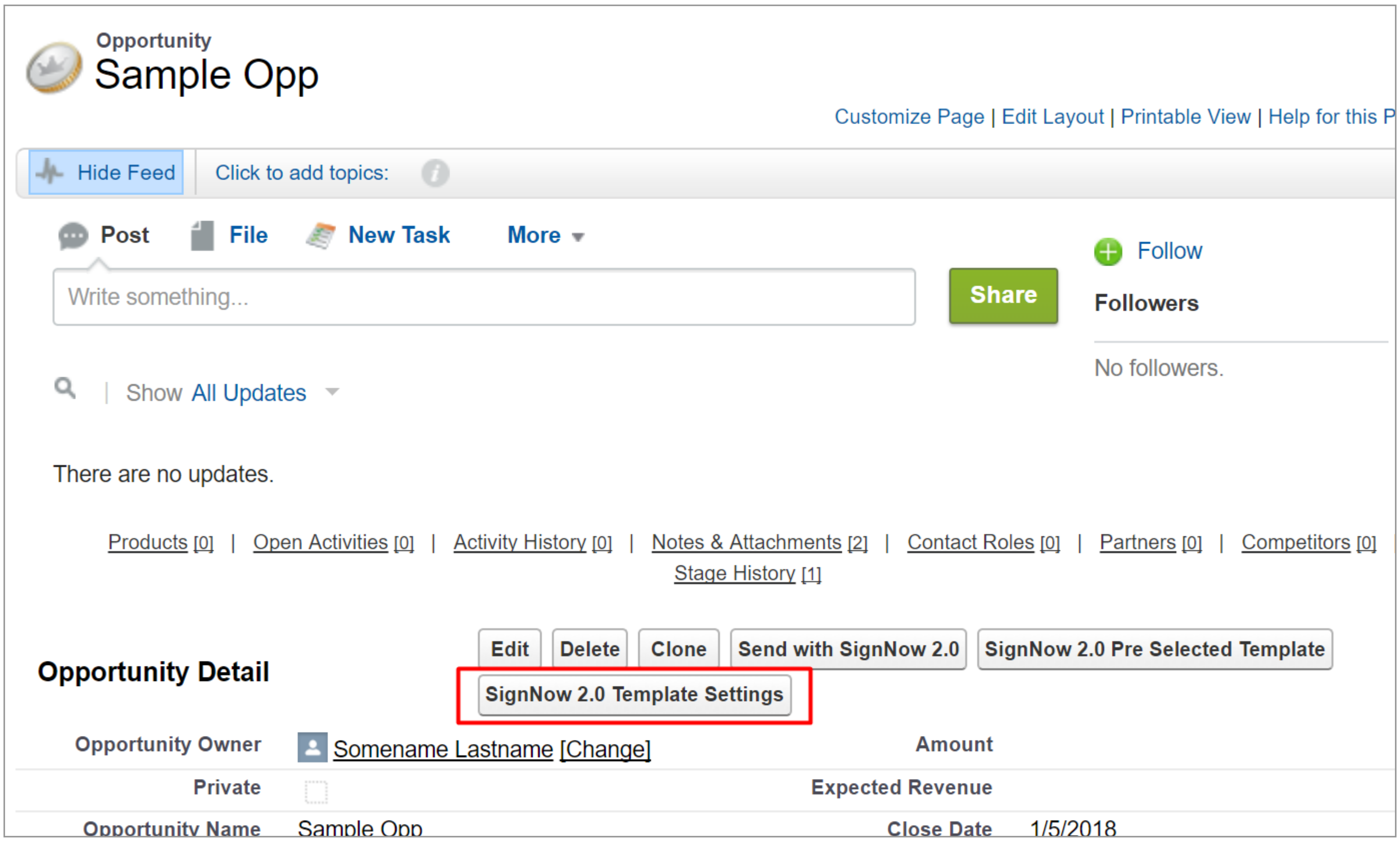
Button Code:

```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Opportunity.Id}
&type=opportunity&template_setting=sf template setting id
```

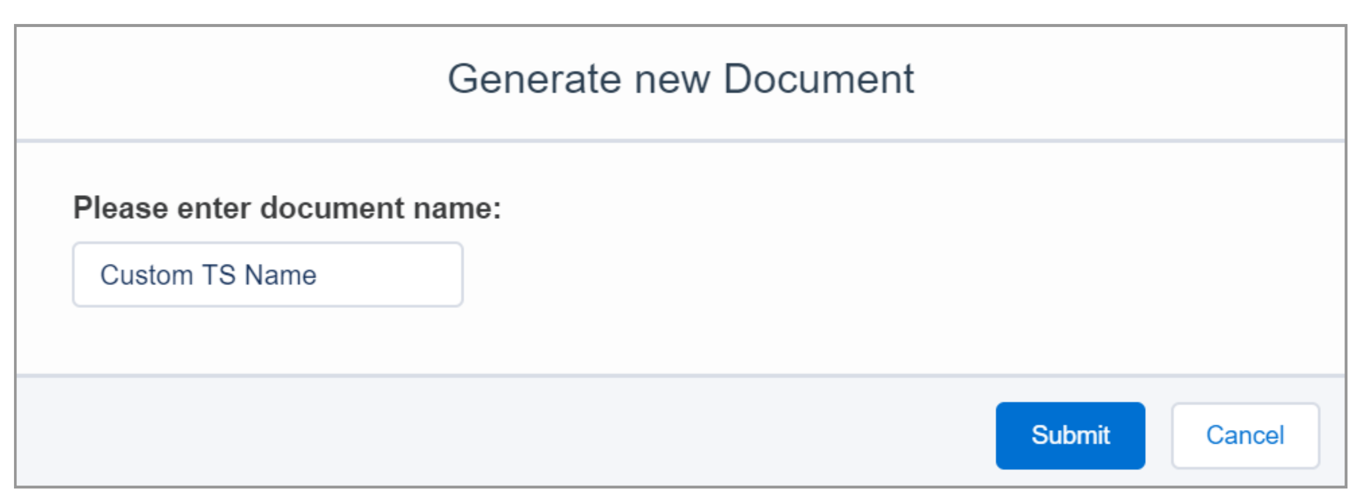
Usage:

Send a Document or a Group of Documents for Signature with Preset Sending Settings using the SignNow Template Settings Button.

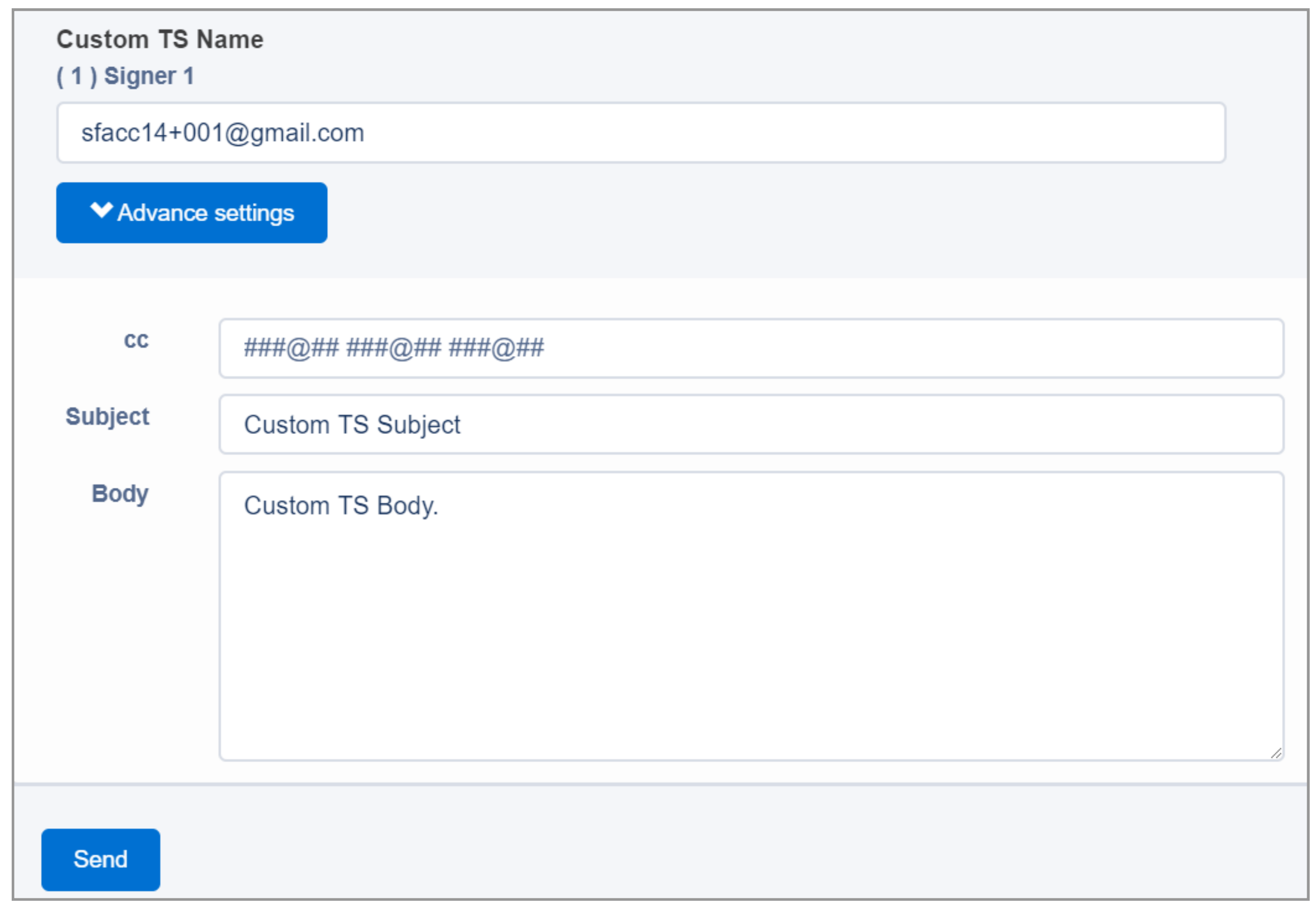
1. In your object click on the *SignNow Template Settings* button.



2. In the SignNow application, click on a template. In the *Generate New Document* pop-up the custom document name that was set in your Template Settings will appear. You can change it or leave it as is, then click *Submit*.



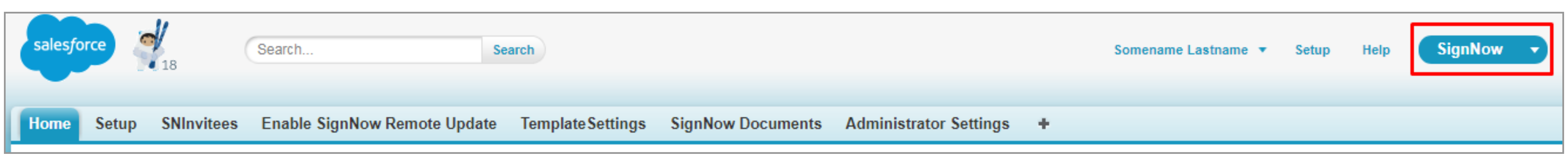
3. The *Send Document for Signing* page with automatically pre-set TemplateSettings will open. You can still change the settings or just click *Send* to send your document.



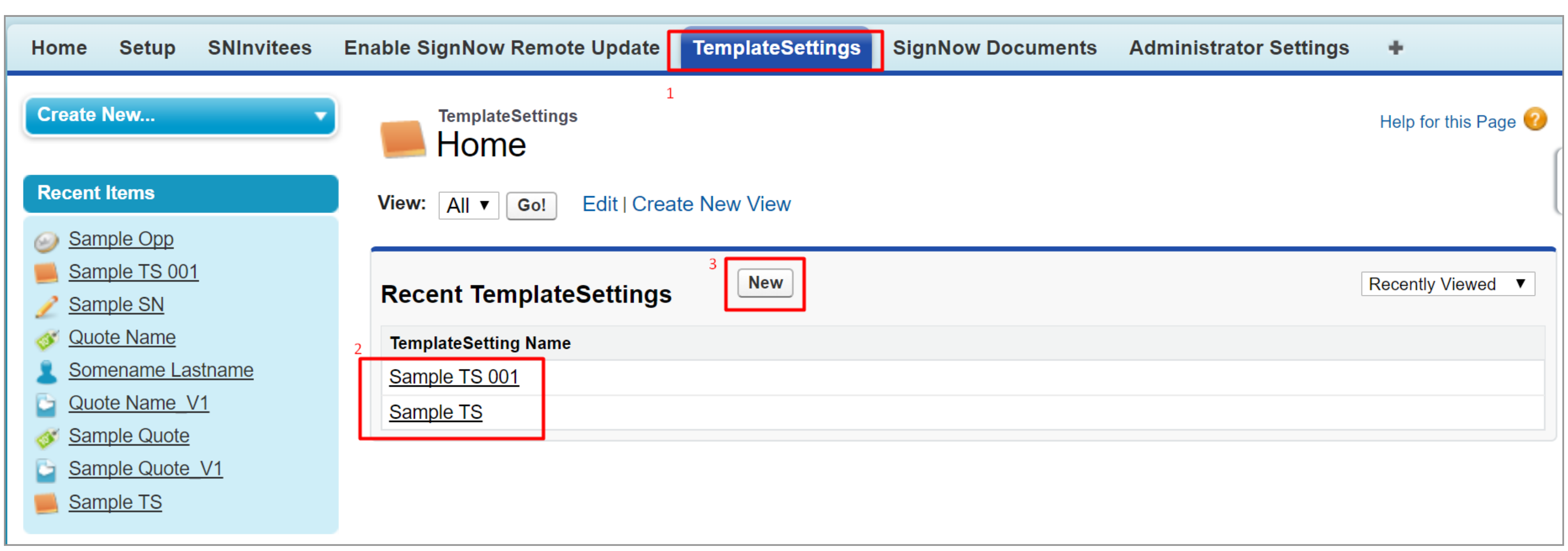
How to Set TemplateSettings

Predefine recipients roles, add a custom subject and body to your emails, add recipients, set Skip to End and Automatic sending, etc., with SignNow TemplateSettings.

1. In your Salesforce org main menu to the upper right select *SignNow*.



2. Select the TemplateSettings tab. All your recent template settings are displayed in the list. To create a new template setting click *New*.



3. Set all the required TemplateSetting options:

- Name the TemplateSetting.
- Assign recipient roles. The roles must be entered in the following format:

```
[{"order":"1", "name":"Signer 1", "email":"somename1@somedomain.com",
"allow_forwarding":"yes"},{"order":"2", "name":"Signer 2",
"email":"somename2@somedomain.com", "allow_forwarding":"no"}]
```

Use the following syntax to load the data from the current object directly to the TemplateSetting (the Contact object in the example):

`{Contact.Name}` recipient name loaded from the record field;

`{Contact.Email}` recipient email loaded from the record field;

`{Contact.Date}` date loaded from the record field, etc.

You can add as many fields as you need separating them by periods.

- Check the *Automatically Send* box to send your document automatically with the *SignNow TemplateSetting* button.
- Check the *Skip to End* box to make the document automatically open on the last step, skipping the document options settings.
- Annotation Config

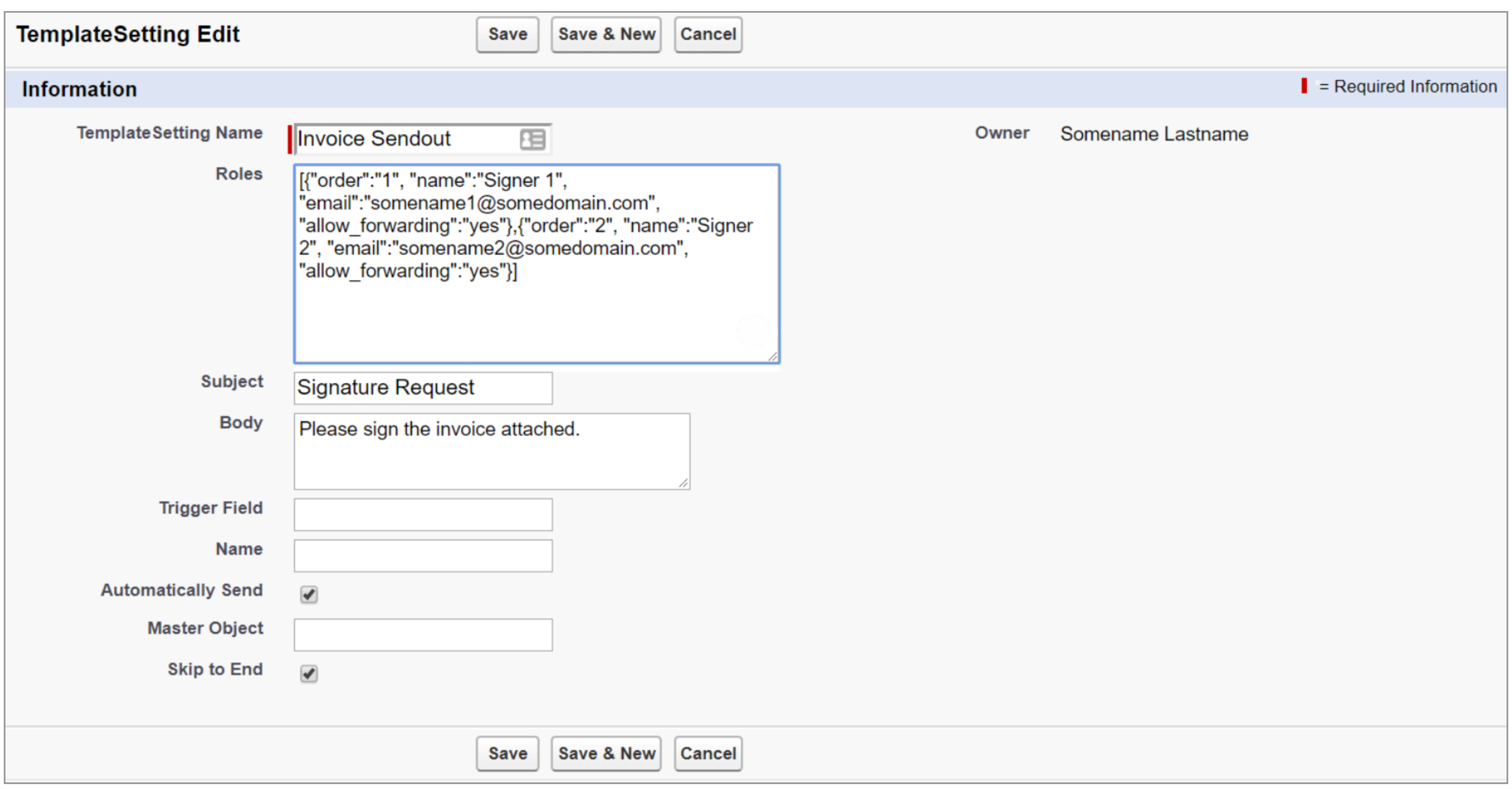
In this section specify the desirable line height as well as font size for the text to be added to the Salesforce Annotations fields, using the following syntax:

In this section specify the desirable line height as well as font size for the text to be added to the Salesforce Annotations fields, using the following syntax:

```
"annotation_config":{
"line_height": 30,
"size": 25}
```

Click *Save* to apply your settings and create a new TemplateSetting.

Note: If Annotations Config field doesn't appear in the TemplateSettings after the SignNow version has been updated, click Edit Layout on your Salesforce object record page, then drag and drop it from the Fields section.



SignNow Attachments

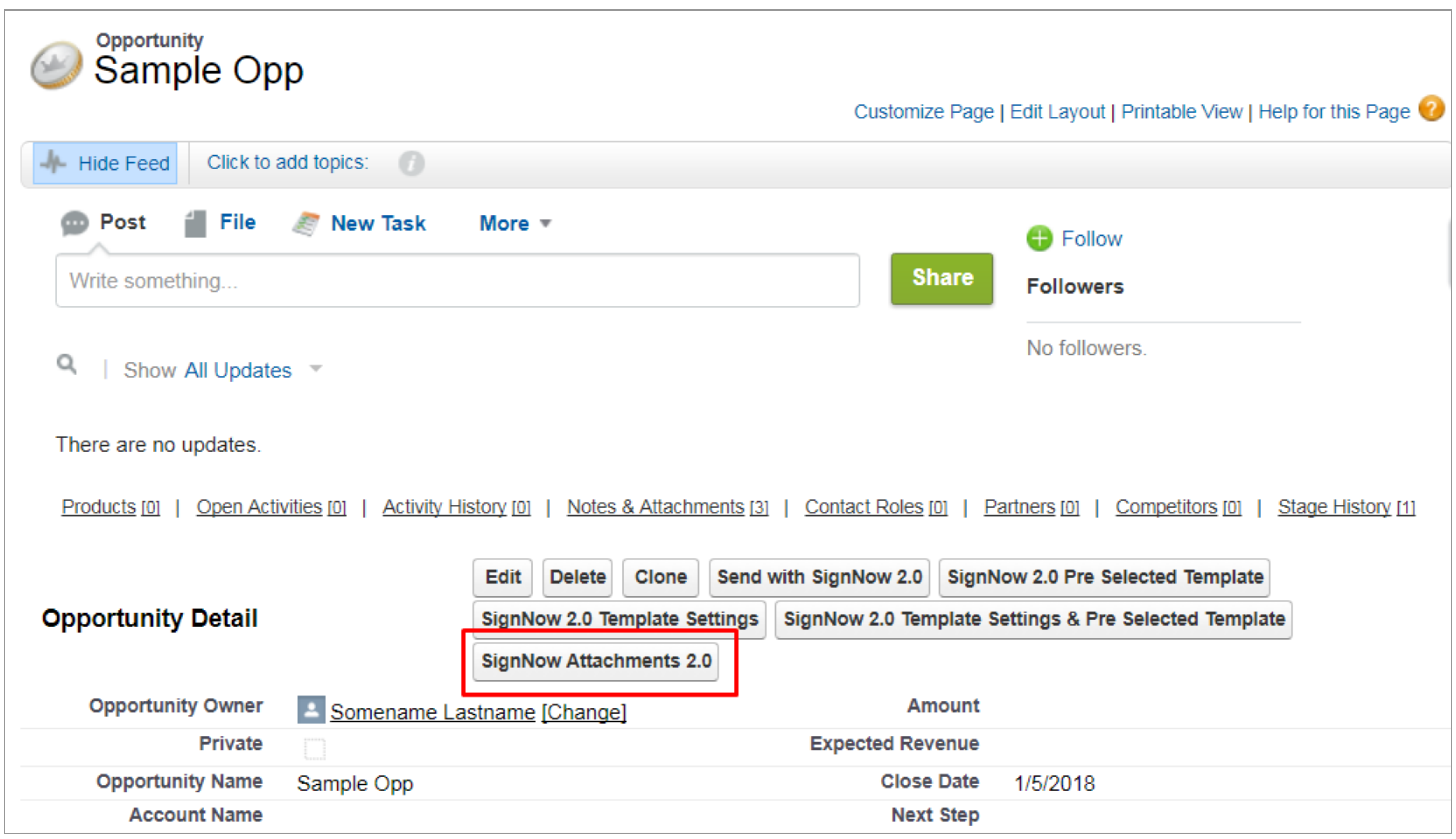
Button Code:

```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Opportunity.Id}
&type=opportunity&view=attachments
```

Usage:

Send an Attachment for Signature with the SignNow Attachments Button.

1. Click on the *SignNow Attachments* button in your object.



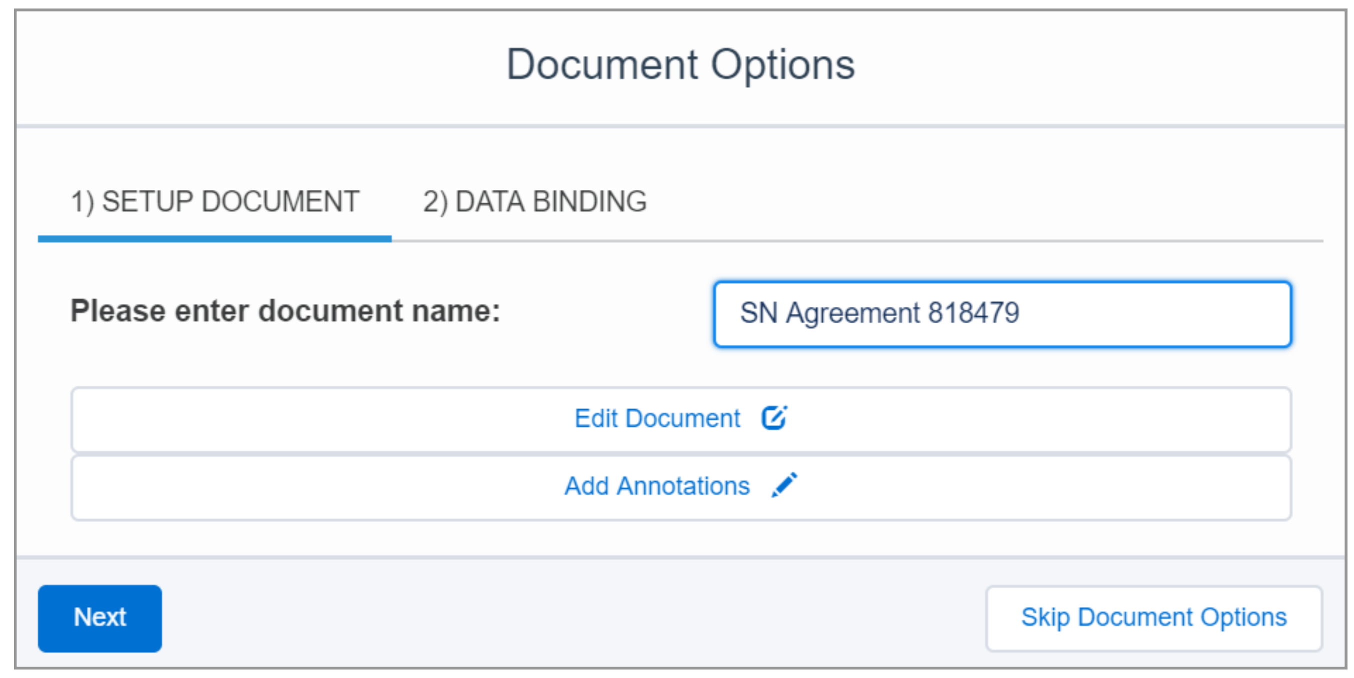
2. Select an attachment from the list and click on it. Use the Search bar to find the required attachment if the entire list isn't displayed on the page.

3. Enter a name for your document.

Click *Edit Document* to open the document in SignNow and edit it (add fillable fields, checkboxes, dropdowns, etc.).

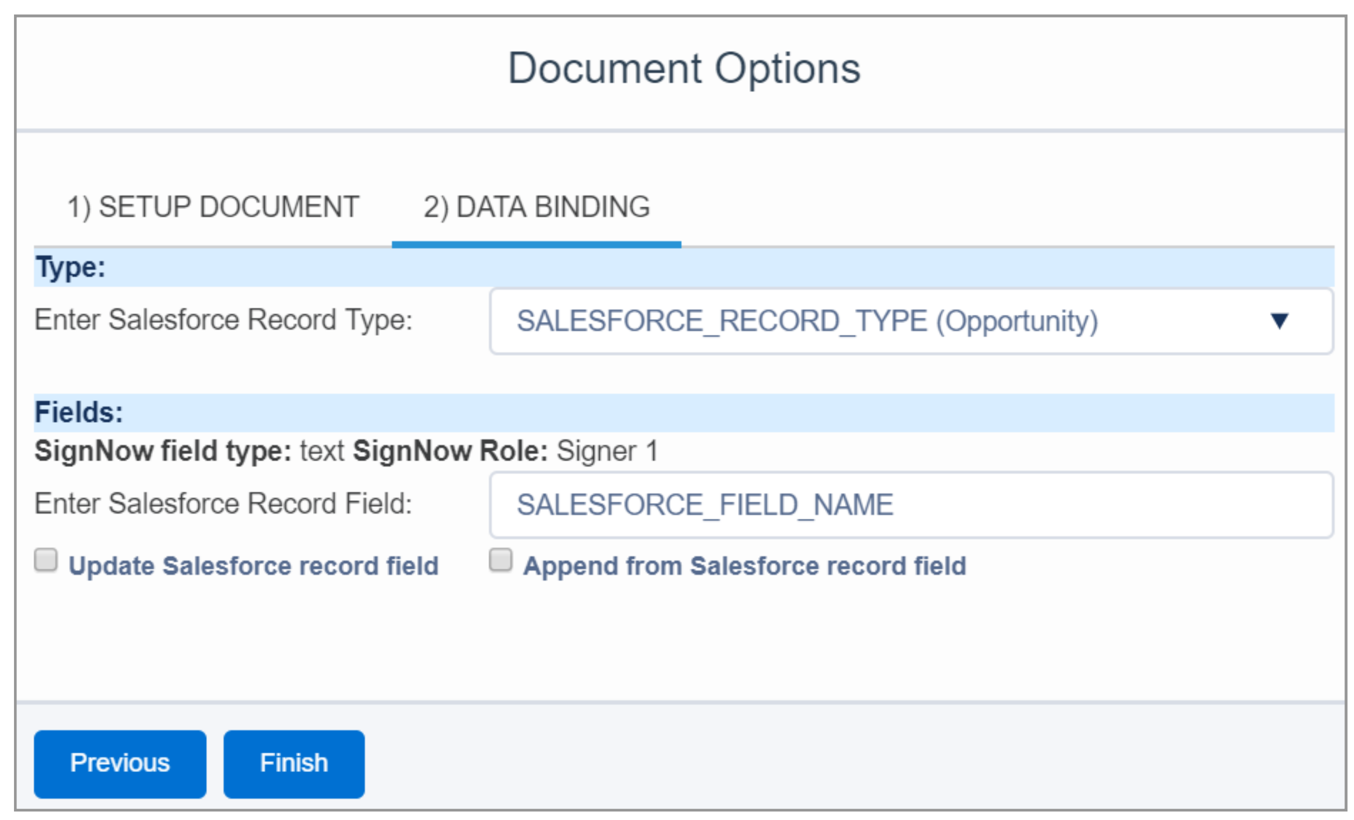
Click *Add Annotations* to add Salesforce annotation fields to your document.

Click *Next* to proceed to the Data Binding settings or *Skip Document Options* if all the required settings have already been set.

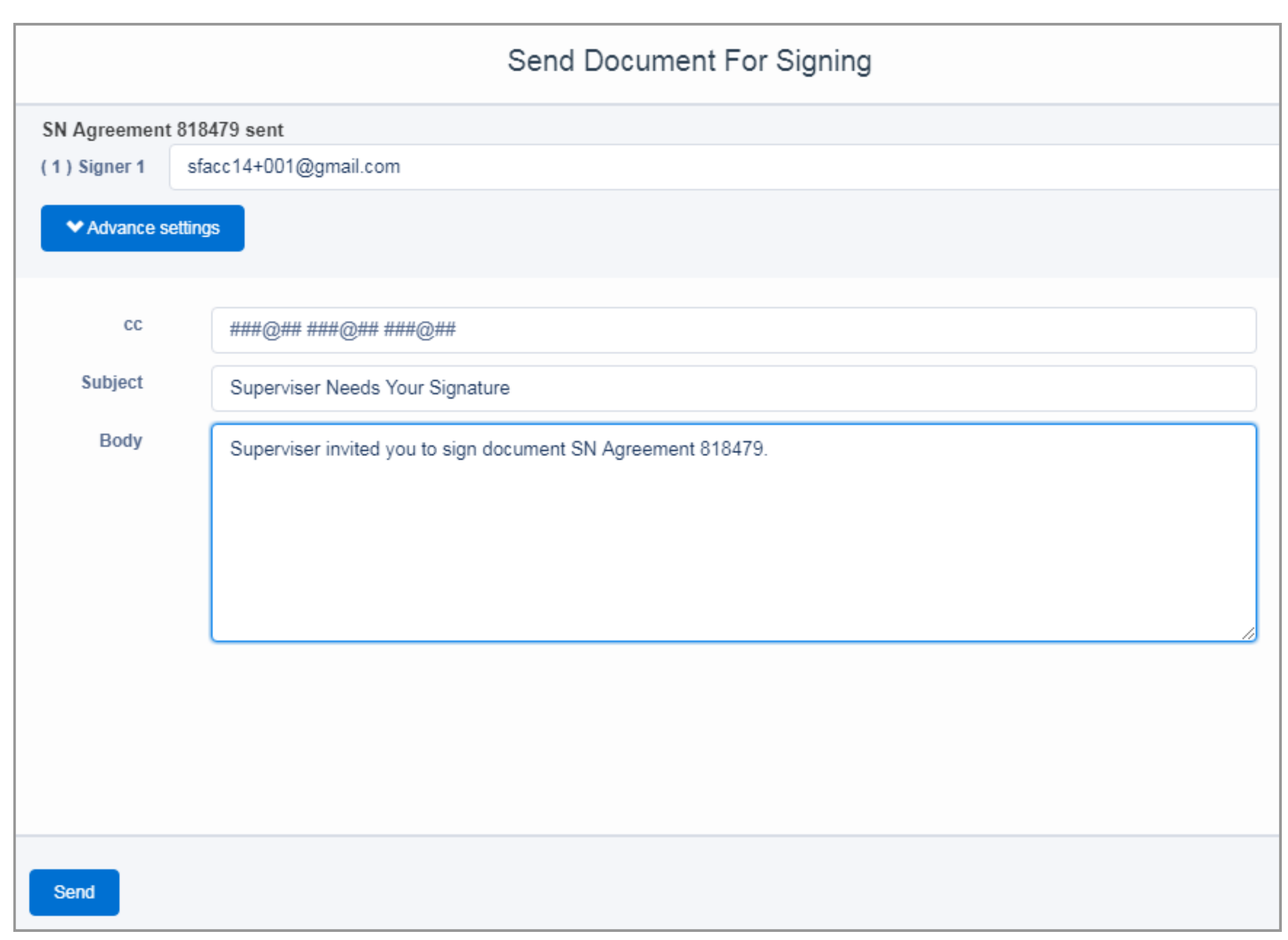


4. In the *Salesforce Data Binding* section you can pre-fill the template with data form the Salesforce record or to update the Salesforce record's fields when the document is filled.

Click *Finish* to apply changes or *Previous* to go back to *Setup Document*.



5. Enter recipient details and click Send to send the attachment. Use Advanced Settings to protect your document with a password, set an expiration date and add a reminder.

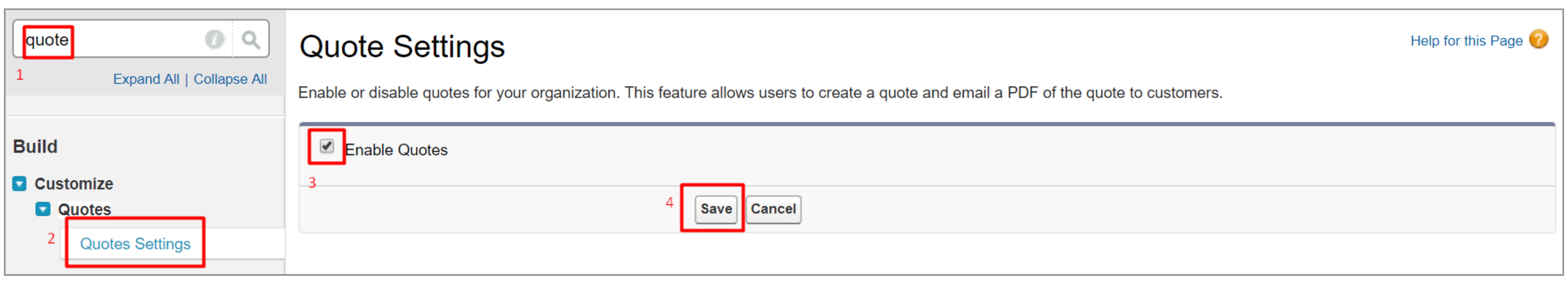


SignNow Quotes (for the Quotes object only)

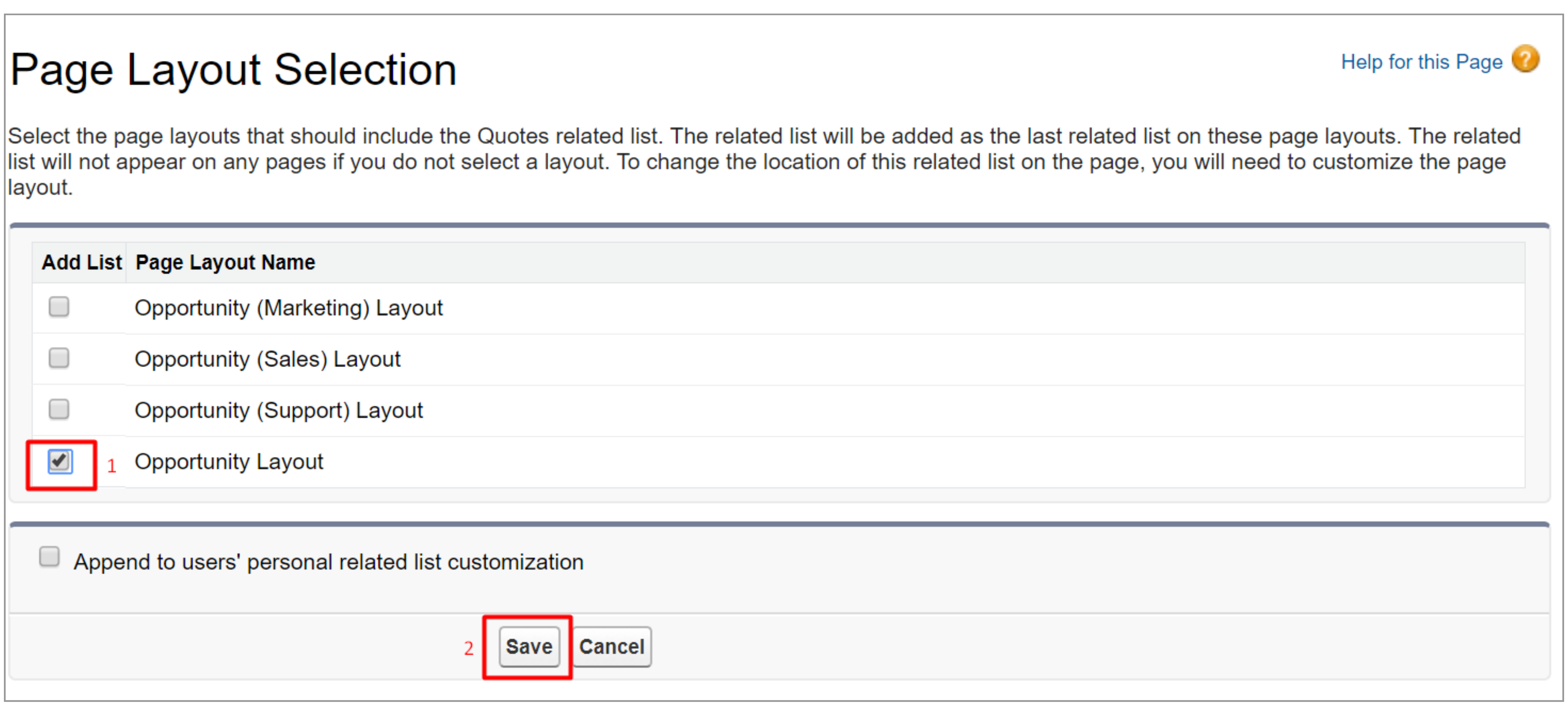
Button Code:

```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Quote.Id}
&type=quote&view=quotes
```

Note: before adding the SignNow Quotes button, the Quotes object must be enabled for your Organization. Use Quick Find to locate the *Quotes Settings* and check the *Enable Quotes* box.



Select the page layouts that should include the Quotes related list by checking the respective boxes (Opportunity Layout in the example) and click *Save*.



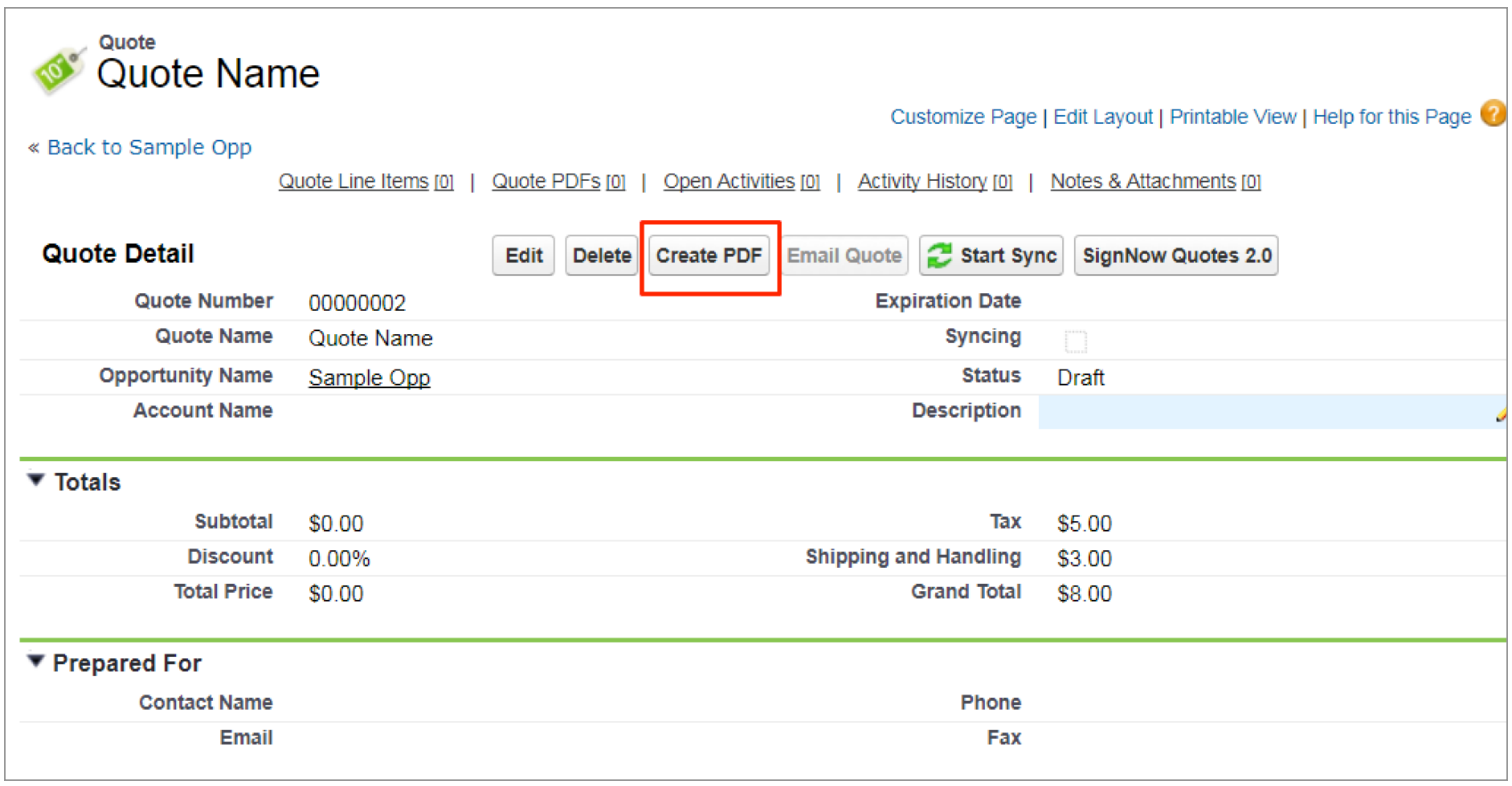
Proceed to step 4 in this guide to Create a SignNow Quotes button for the Quotes object.

Usage:

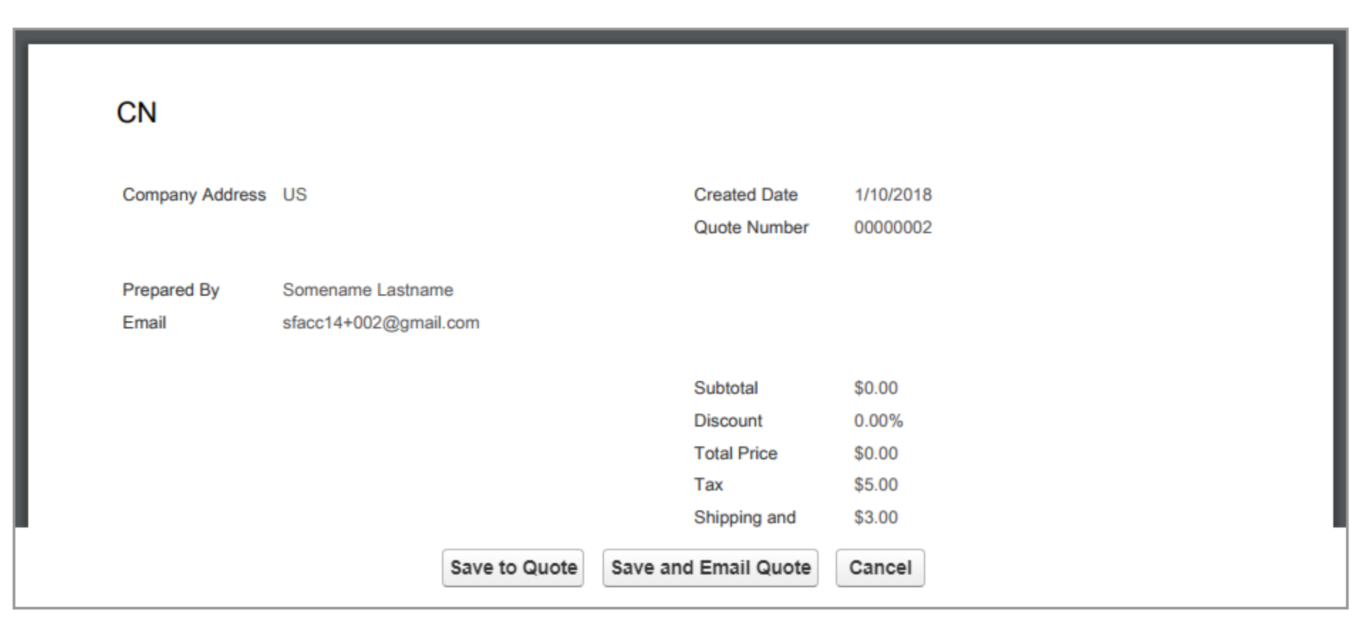
Send Quotes with the SignNow Quotes Button.

Note: before adding the SignNow Quotes button, the Quotes object must be enabled for your Organization. Use Quick Find to locate the *Quotes Settings* and check the *Enable Quotes* box.

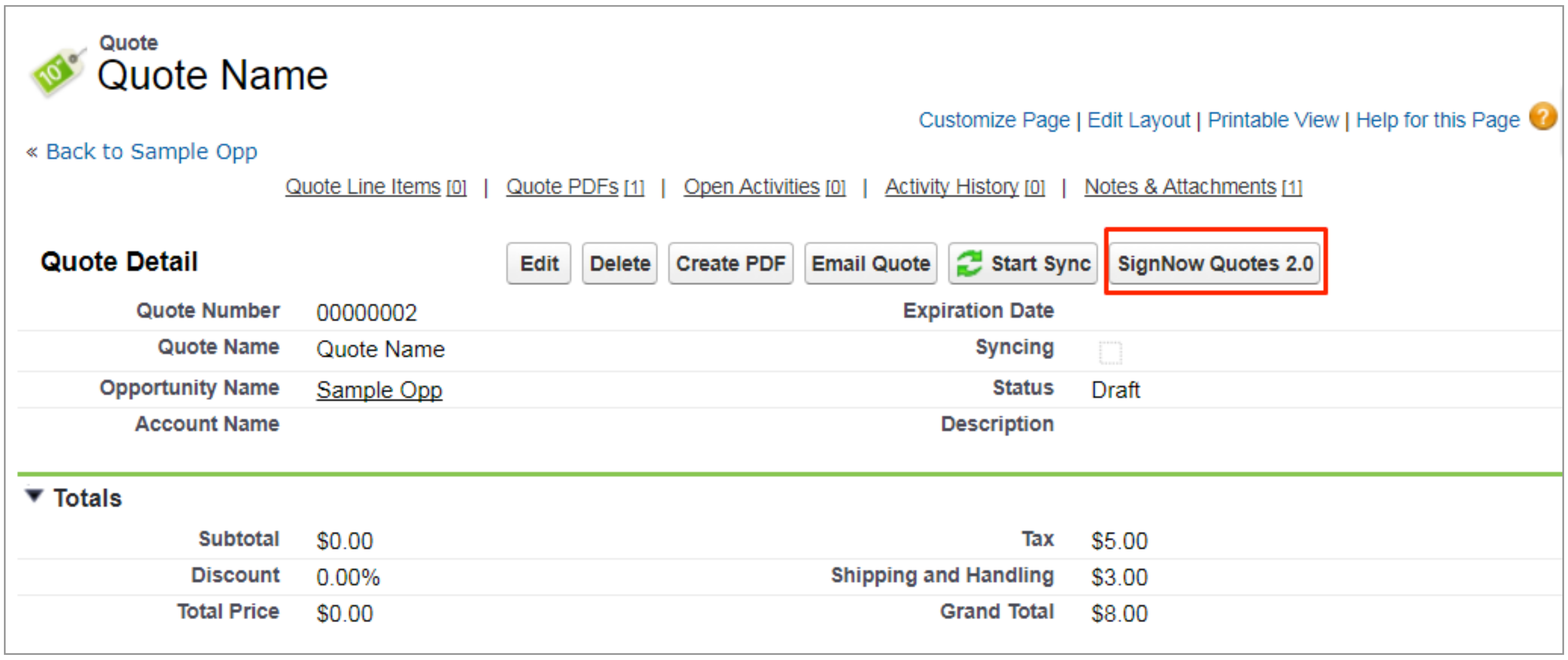
1. In your object (Opportunity in the example) click *Quotes*. Select a Quote or create a new one and on the Quote page click *Create PDF*.



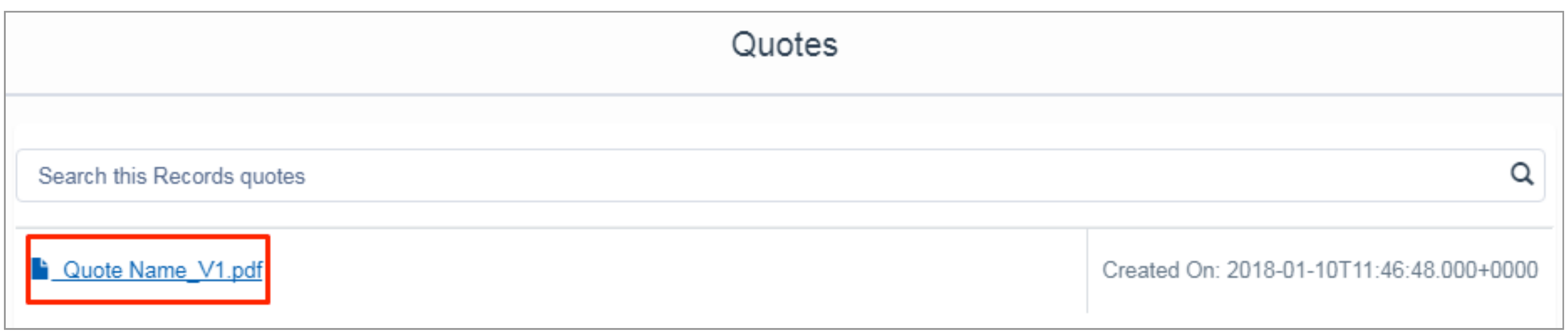
2. A new PDF document with your Quote details will be generated. Click *Save* to *Quote*.



3. On your Quote page click *SignNow Quote.*



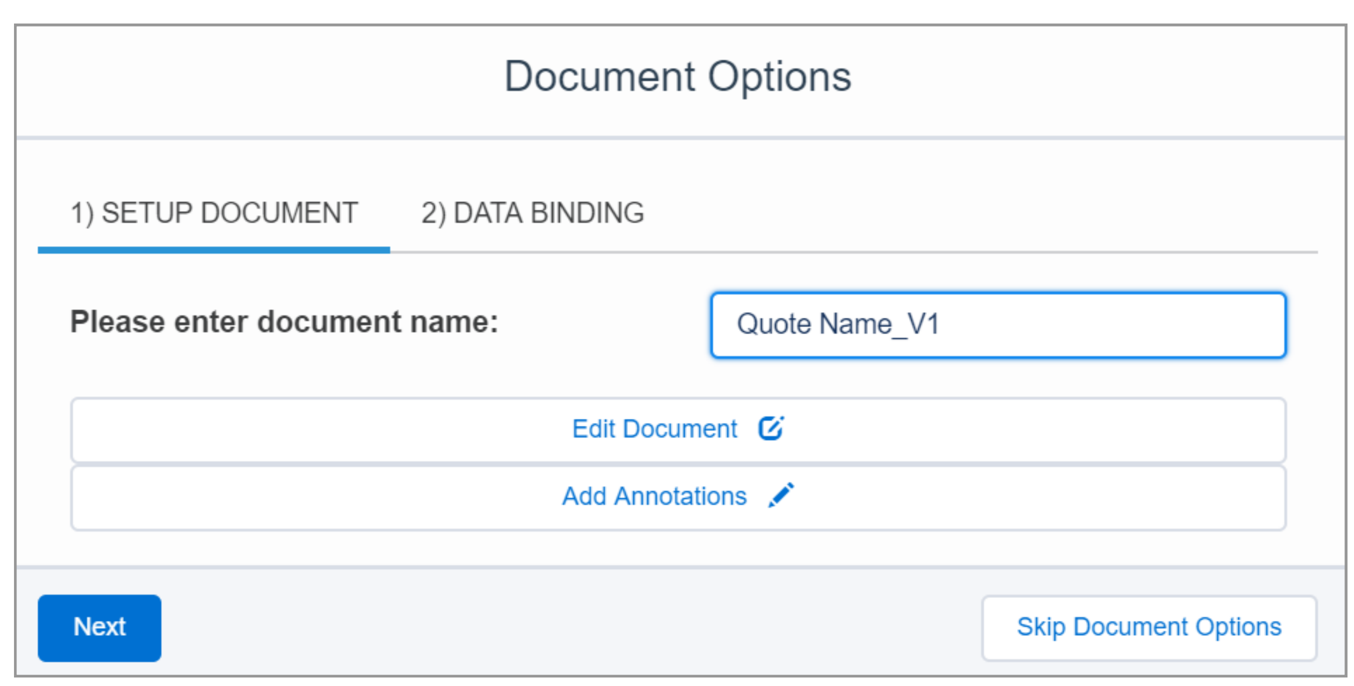
4. Select your PDF document from the quote record list. Use the Search bar to find the required quotes if the list doesn't fit on the page.



5. Click *Edit Document* to open the document in SignNow and edit it (add fillable fields, checkboxes, dropdowns, etc.).

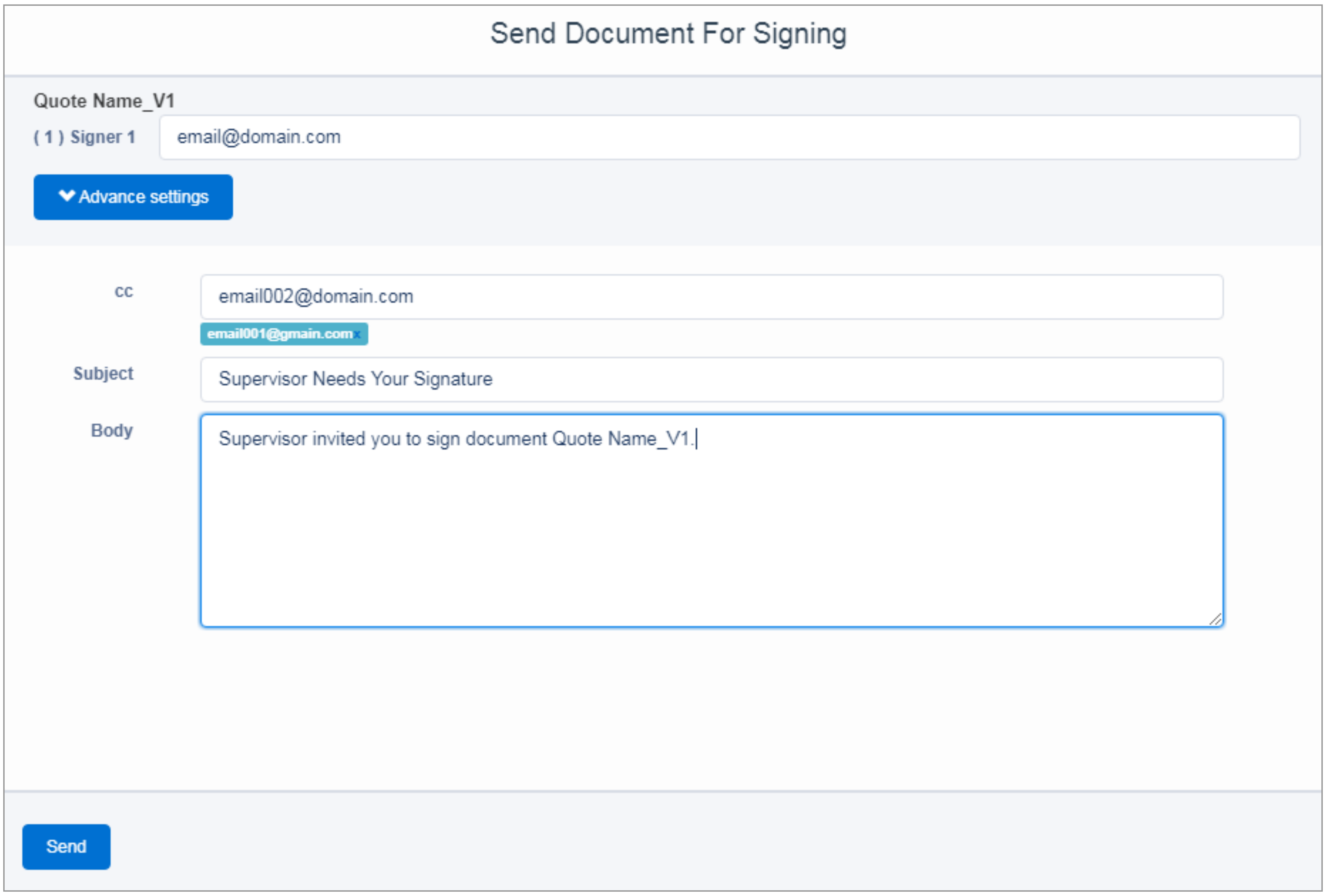
Click *Add Annotations* to add Salesforce annotation fields to the document.

When you've finished editing, click *Next* to proceed to Data Binding settings or *Skip Document Options* if all required settings have been configured.



Choose Data Binding if you want to update Salesforce object record fields using data from a filled document or update document fields with Salesforce data. When done, click Finish.

6. In the window that will open next, enter recipient details and click Send to send the quote out to be e-signed. Use Advanced Settings to protect your document with a password, set an expiration date and add a reminder.



SignNow Bulk Invite

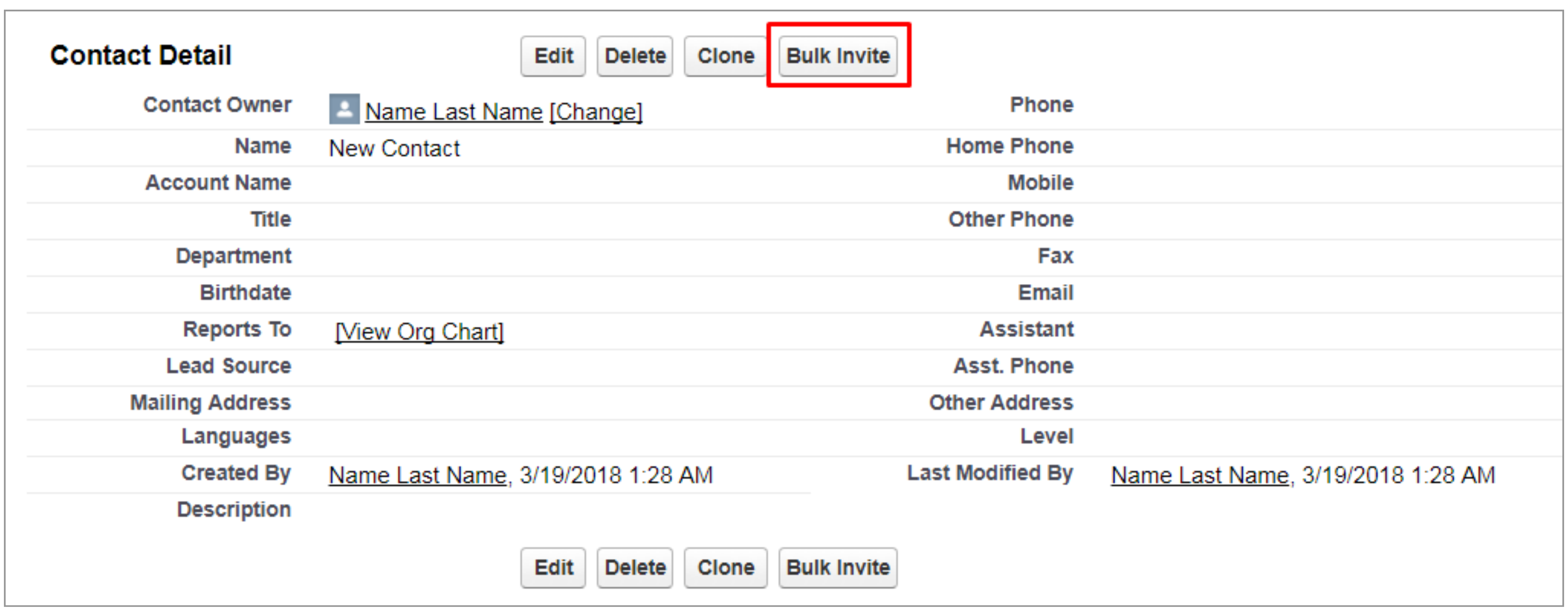
Button Code:

```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Contact.Id}
&type=contact&view=bulk_invite&bulk_invite_type=contact&bulk_email_field=Email
```

Usage:

Collaborate on a document with a group of recipients by sending it using the SignNow Bulk Invite button.

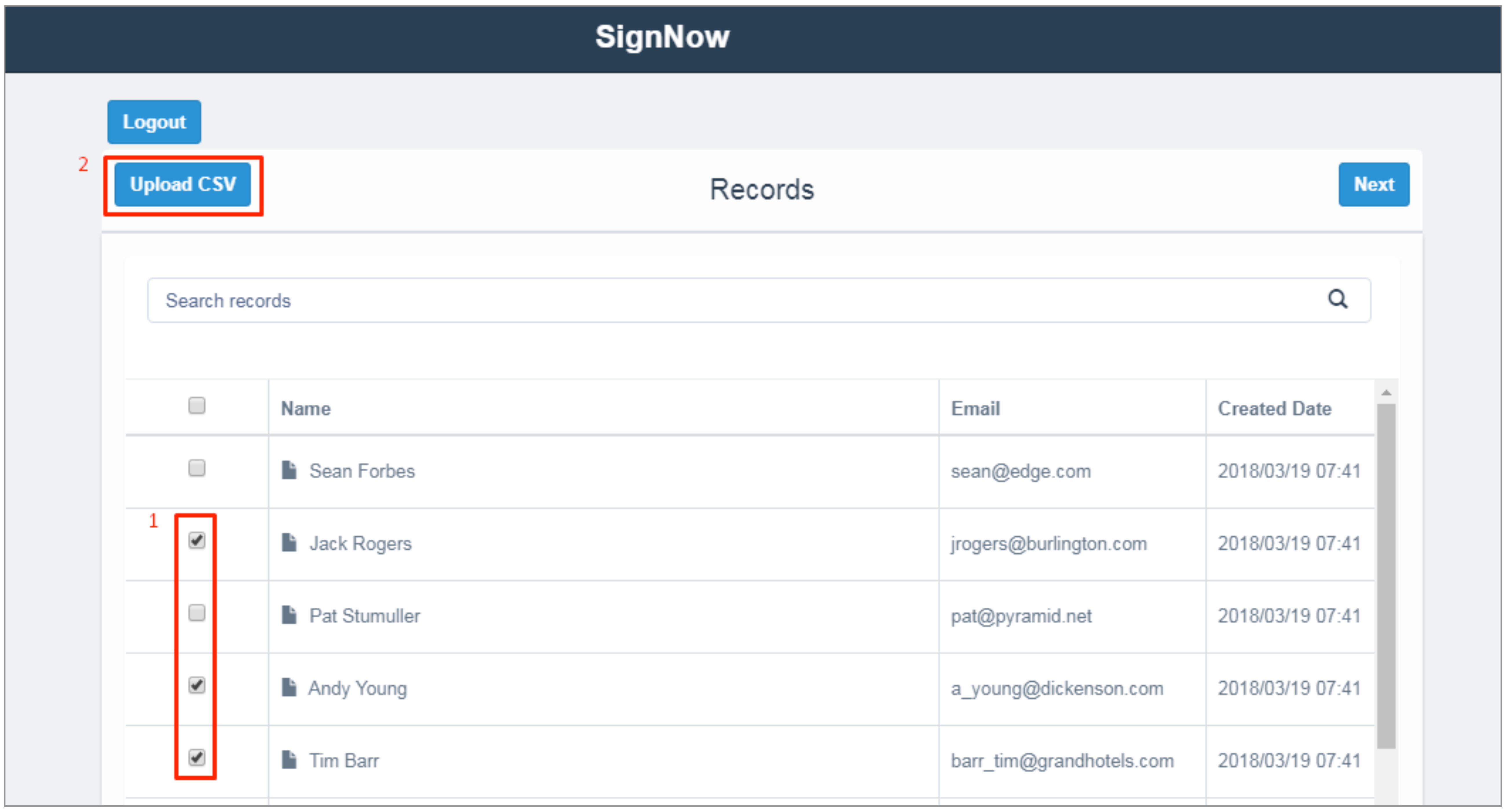
To send an invite, click *Bulk Invite* on your object page.



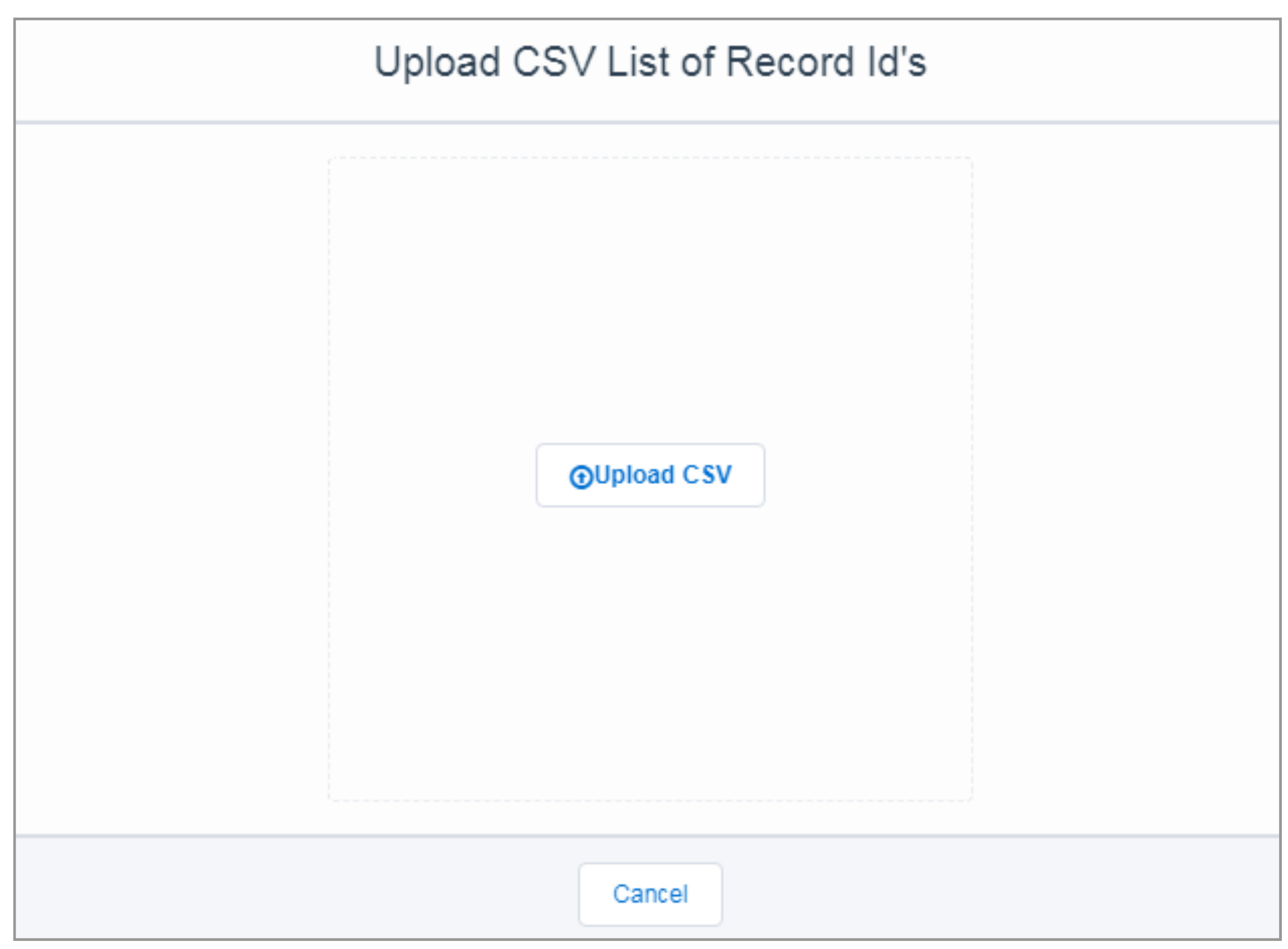
Select required contacts from the Records list by checking the boxes next to their names and clicking *Next*.

Alternatively, click *Upload CSV* to upload the list of your contacts in .csv format from your device.

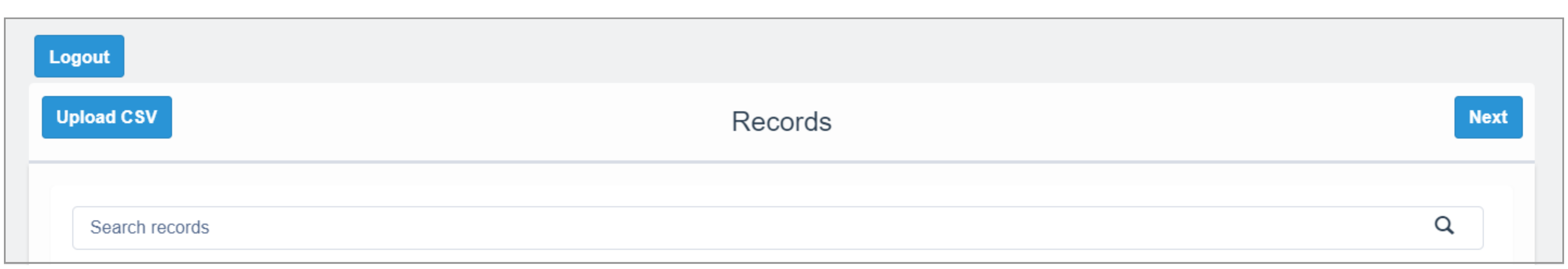
Note: If you would like to send a Bulk Invite using a CSV file, make sure to prepare one using a comma-separated list for all required record IDs inside.



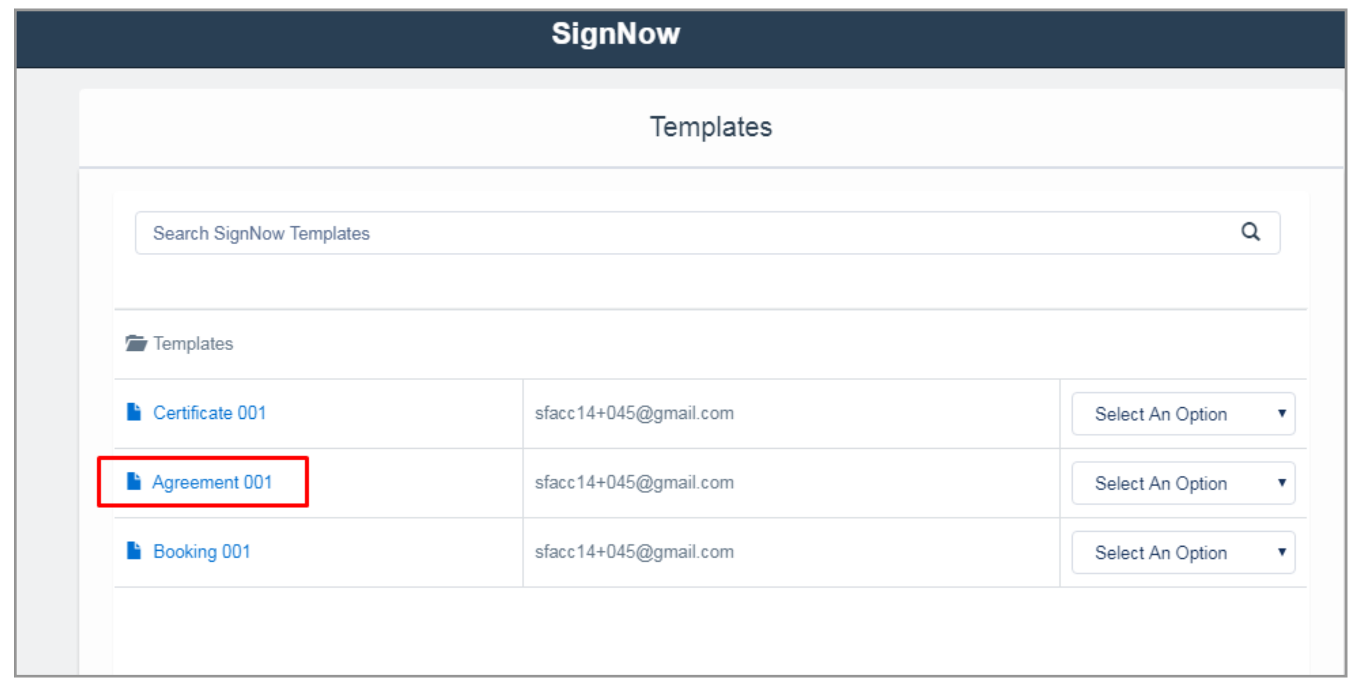
- Click *Upload CSV* in the Upload CSV List of Record ID's pop-up.



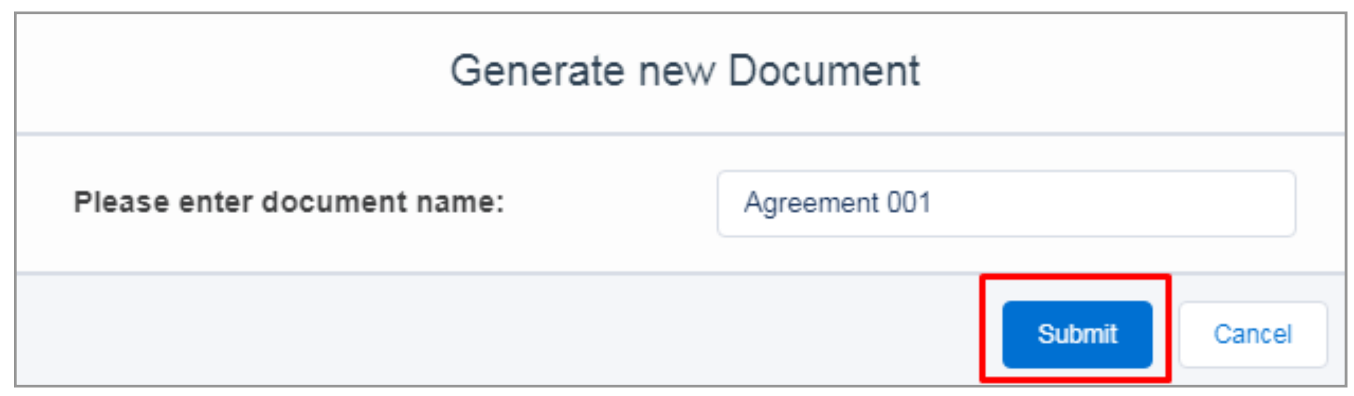
- When your file has been uploaded, click *Next*.



Select a document from the list to be sent, click on it.



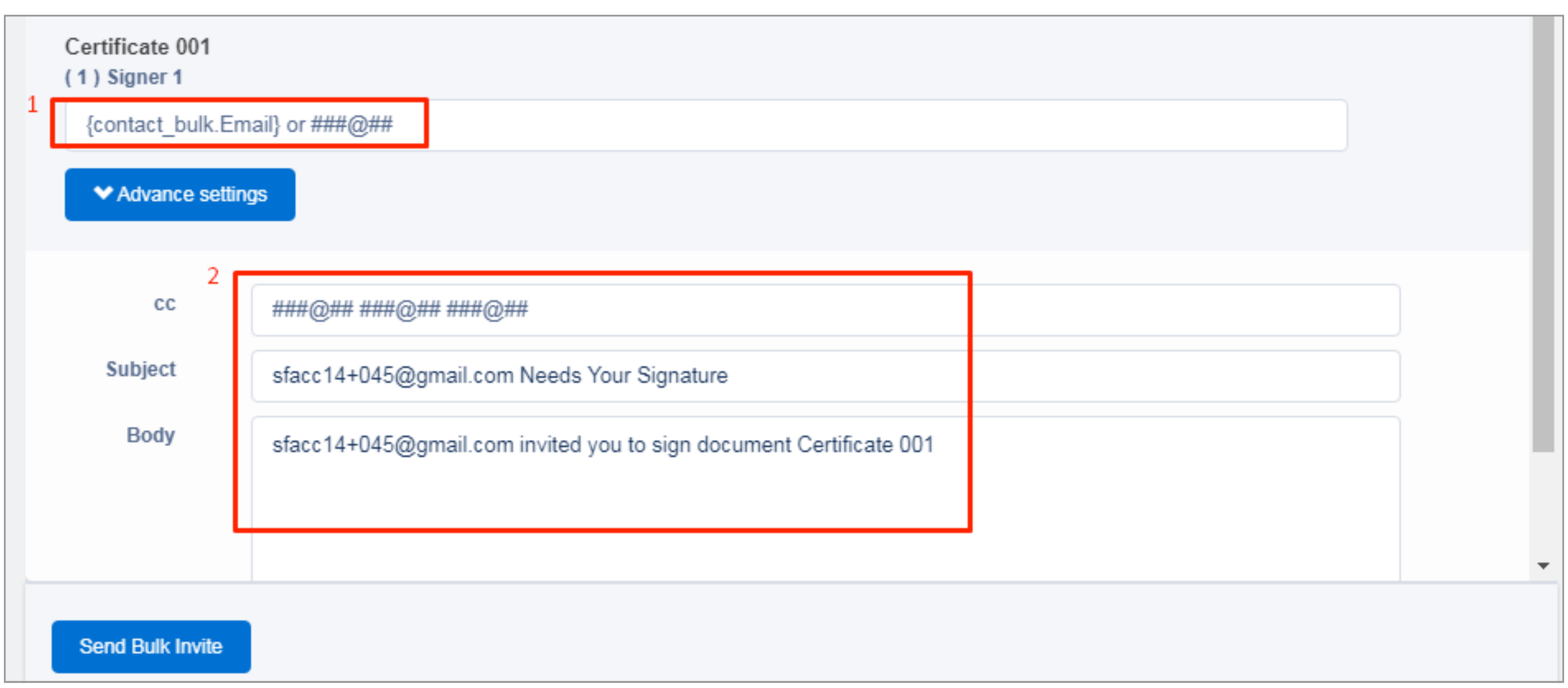
Specify a name for the new document and click *Submit*.



In the Signer field, enter `{contact_bulk.Email}` to send your Bulk Invite to the recipients selected on the previous step (by selecting the contacts or uploading the CSV file).

Alternatively, enter emails in the standard form ###@###. In this case, the Bulk Invite will only be sent to those emails that you've specified. Enter emails for cc'd recipients in the standard form if needed.

Enter `{contact_bulk.RECORD_FIELD_NAME}` in the subject and the body of your Bulk Invite to automatically populate them with respective record fields data.



When finished, click Send Bulk Invite.

Additional Parameters for Button Codes

If you want to get rid of some repetitive steps or adjust additional settings for your SignNow buttons, you can add some additional parameters to the button codes. This will allow you to automate particular processes and perform certain actions faster.

Preset CC emails

Each time you send your documents out to be e-signed, you can add additional emails of recipients who will get a notification once a document has been signed. If you'd like particular CC'd recipients to be specified automatically when creating a signature request, you can use preset CC emails for your sending.

To do so, add `&cc=` and add the required emails to the end of your button code. Add as many emails as you need separating them with a comma. It should look as follows:

```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Opportunity.Id}
&type=opportunity&cc=mail01@domain.com,email02@domain.com,email03@domain.com
```

In this case, the additional emails will be automatically added to the form being sent each time you create a signature request.

Edit Preset Emails for Templates

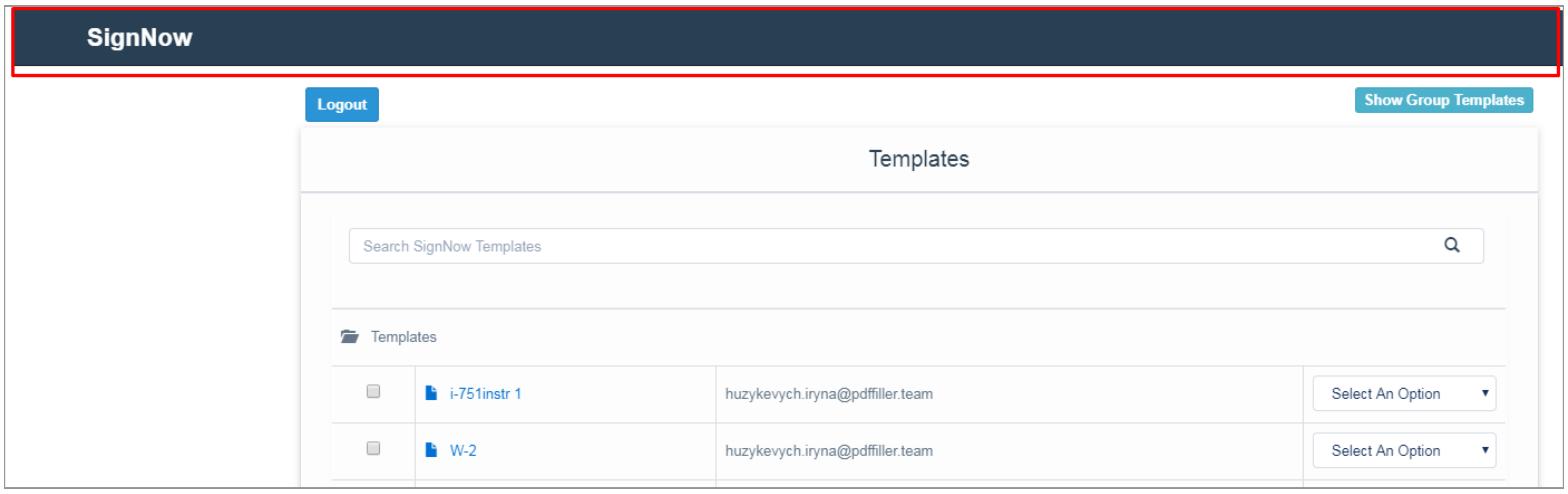
If you have preset emails for templates in your SignNow application, they will be automatically added each time you create a signature request without the ability to change them.

In case you'd like to edit preset emails each time you send templates out for signing, add `&option=edit_email` in your button code. This should look as follows:

```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Opportunity.Id}
&type=opportunity&option=edit_email
```

Hide SignNow bar

Adding this parameter allows you to hide the SignNow bar from the page when creating a signature request.



To activate this option, add the below parameter to the button code. This will look as follows:

```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Opportunity.Id}
&type=opportunity&hide_bar=true
```

Redirect to the Salesforce Record Page after Sending an E-Signature Request

You can skip repetitive steps and go straight back to the Salesforce object record page once the signature request has been sent with SignNow. Save your time by adding this parameter to your button's code.

This option will automatically redirect you to the Salesforce object record page each time you have sent your documents out to be e-signed.

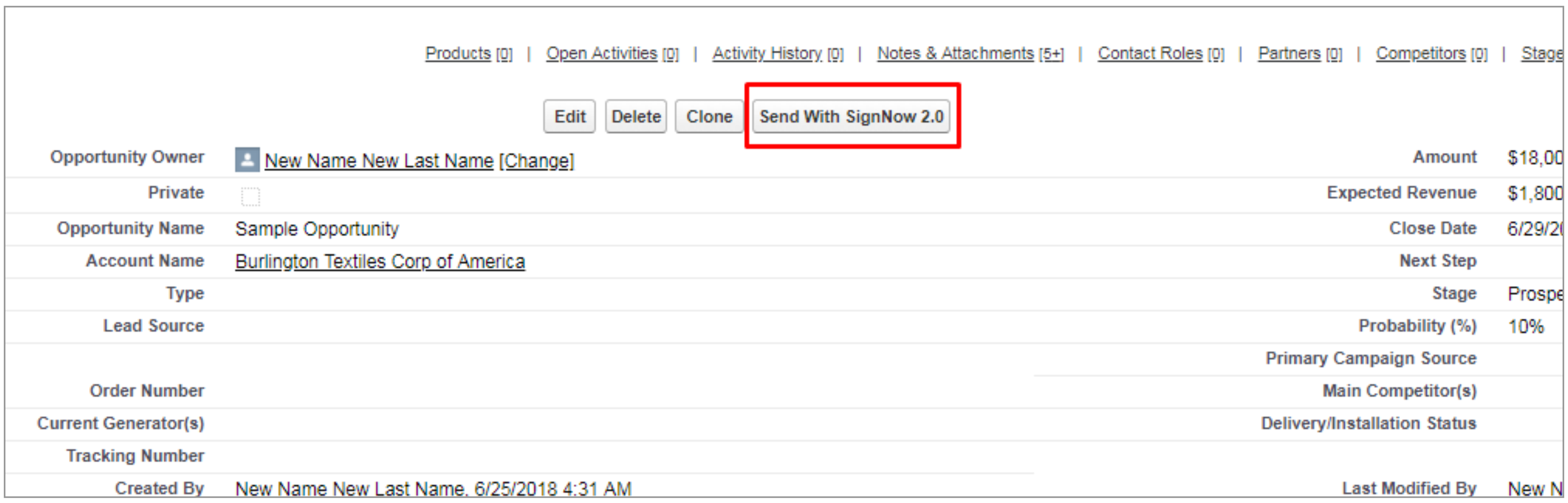
The code will look as follows:

```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Opportunity.Id}
&type=opportunity&redirect=true
```

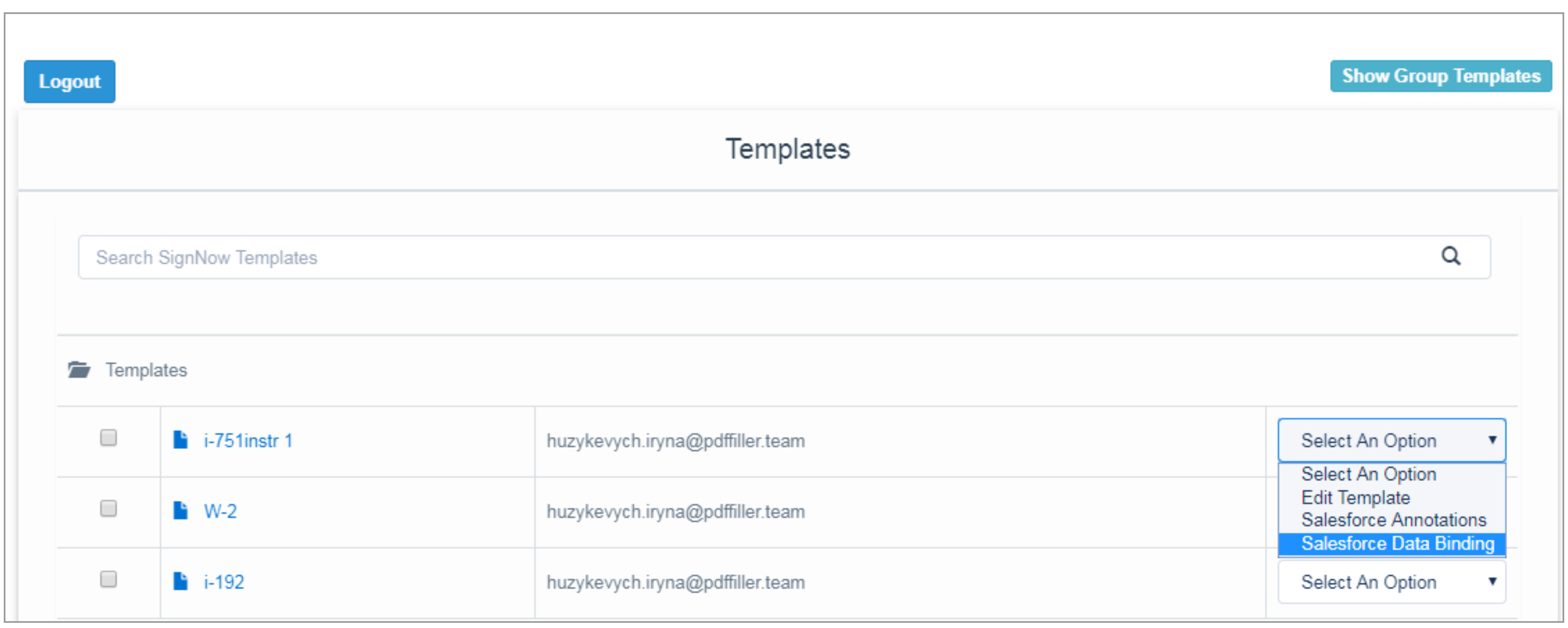
Salesforce Data Binding

Easily update data in Salesforce object records or data in your documents with the Data Binding option. The Salesforce object record fields will be updated using data from a filled document and the documents will be updated with data from Salesforce object record fields. To do this, follow a step-by-step instruction below:

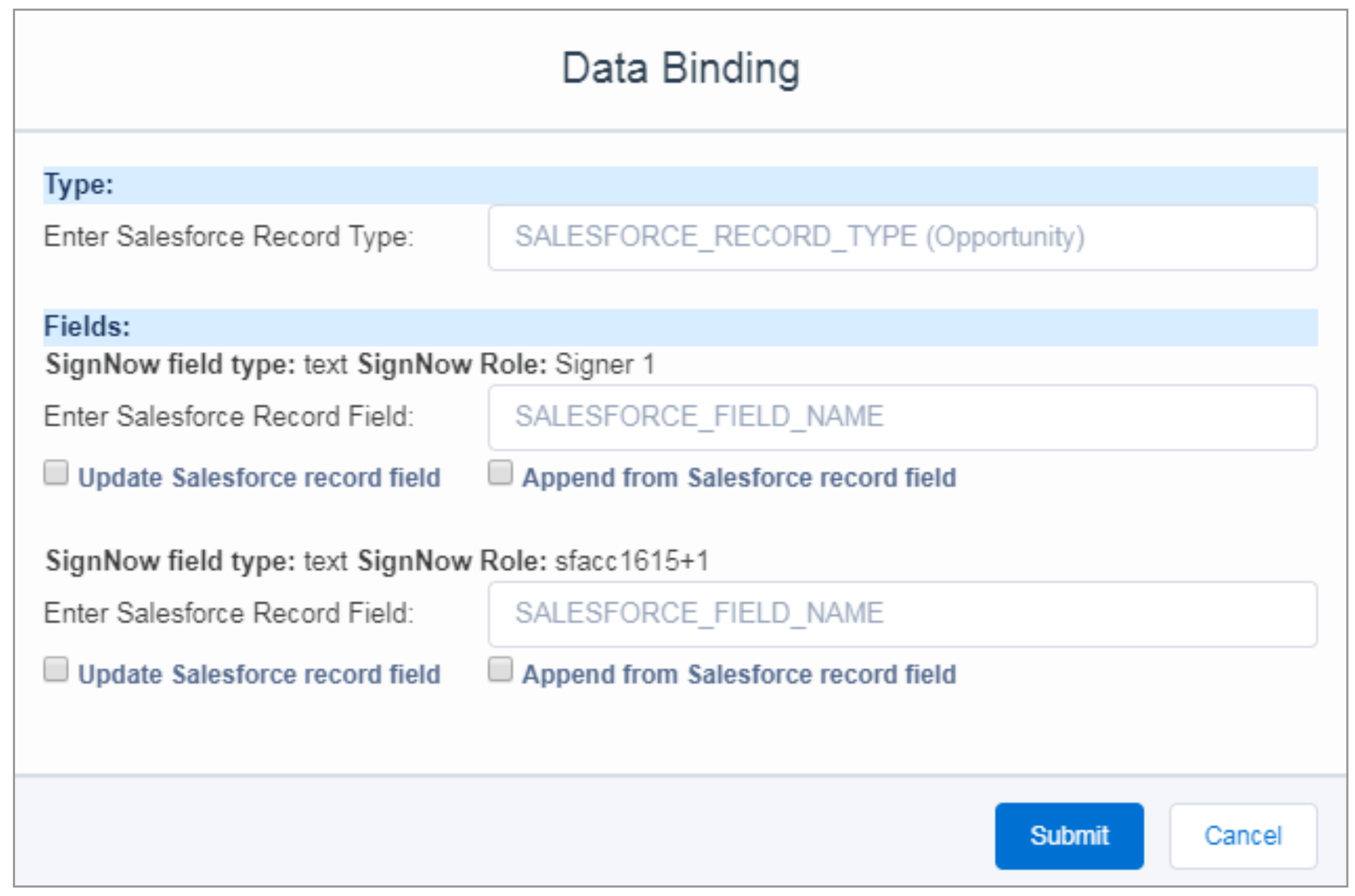
1. Click the necessary button on your Salesforce object record page (Send with SignNow in the example):



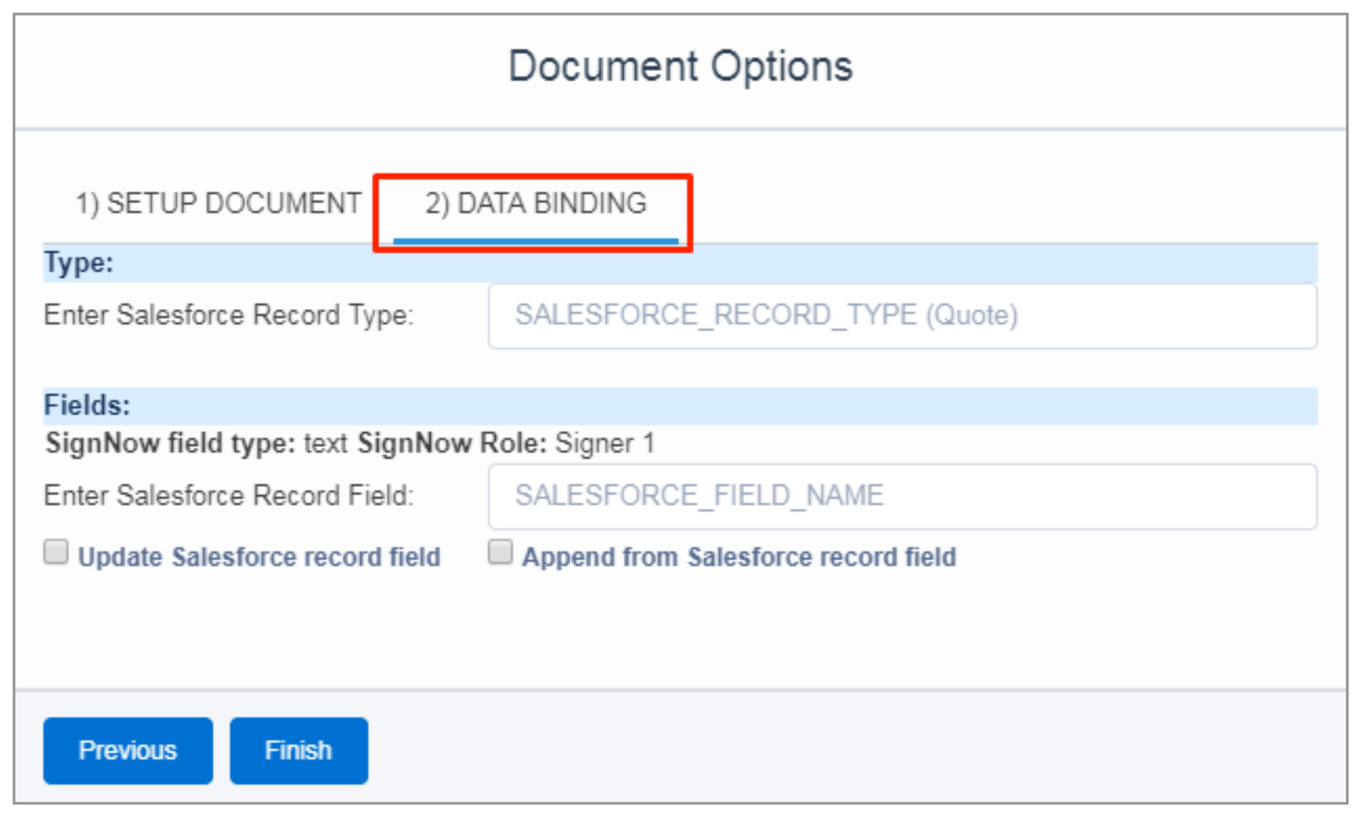
2. On the page that will open next, choose the document you need and in the Select an Option menu, choose Salesforce Data Binding:



The Data Binding settings window will open:



Note that for Quotes and Attachments, go to the Document Options. Next, proceed to the Data Binding tab:



3. Specify your current Salesforce record type and the fields you'd like to populate data from.

Use proper checkboxes to update the fields in Salesforce records or in the document.

If the Update Salesforce record field is checked, then the Salesforce record fields will be updated with the data from your document fields.

If the Append from Salesforce record field is selected, then document fields will be updated with the data from Salesforce record fields.

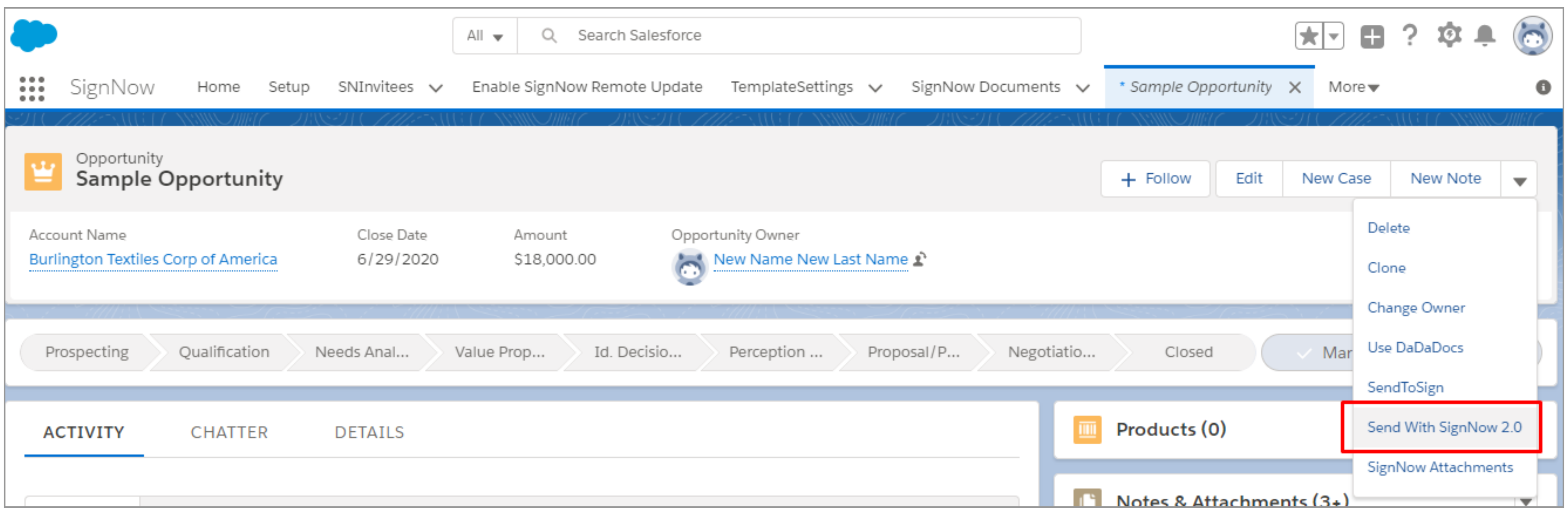
If both are checked, then the document fields will be updated with the data from Salesforce record fields and then after a user has changed it, it will be populated in the Salesforce record fields.

Salesforce Annotations

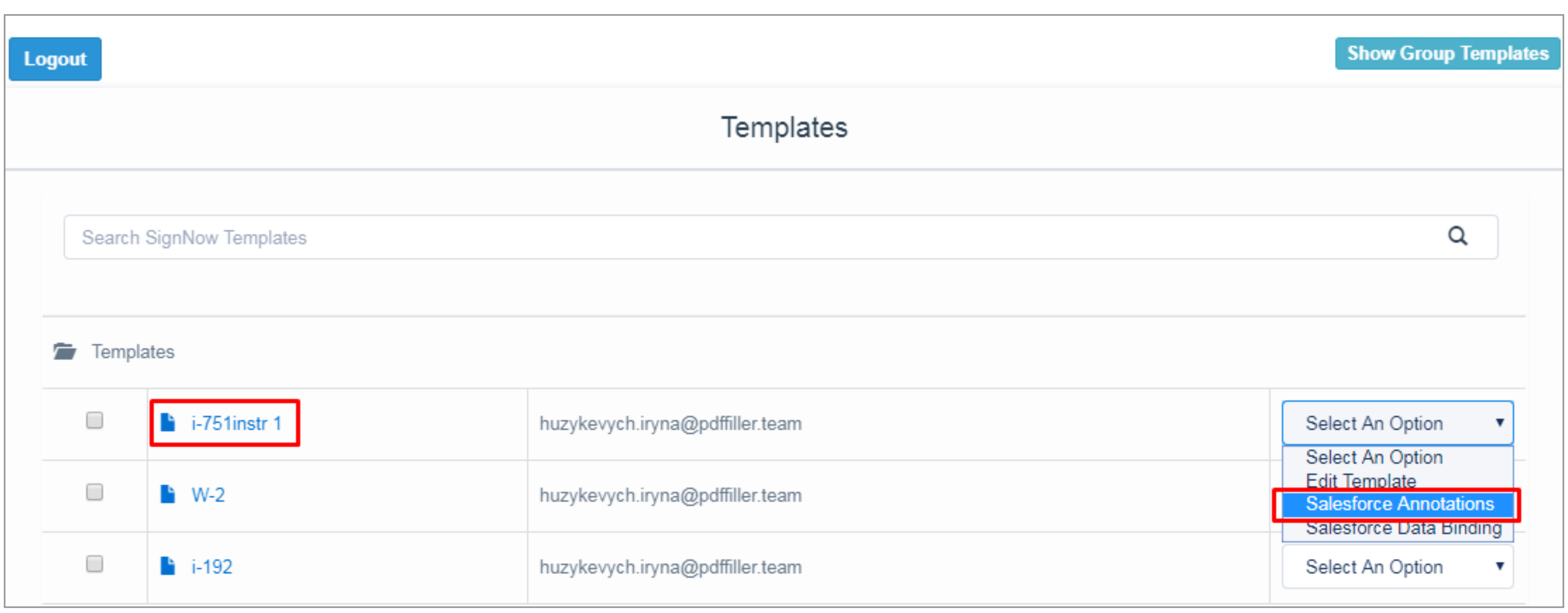
Easily add Salesforce Annotation Fields to your SignNow templates and connect them to the Salesforce object record fields with Salesforce Annotations. Once your customers have received your template, such fields will be automatically filled with data from the particular Salesforce object record fields you have previously specified.

This section will guide you through the process of adding Salesforce annotations to your SignNow templates.

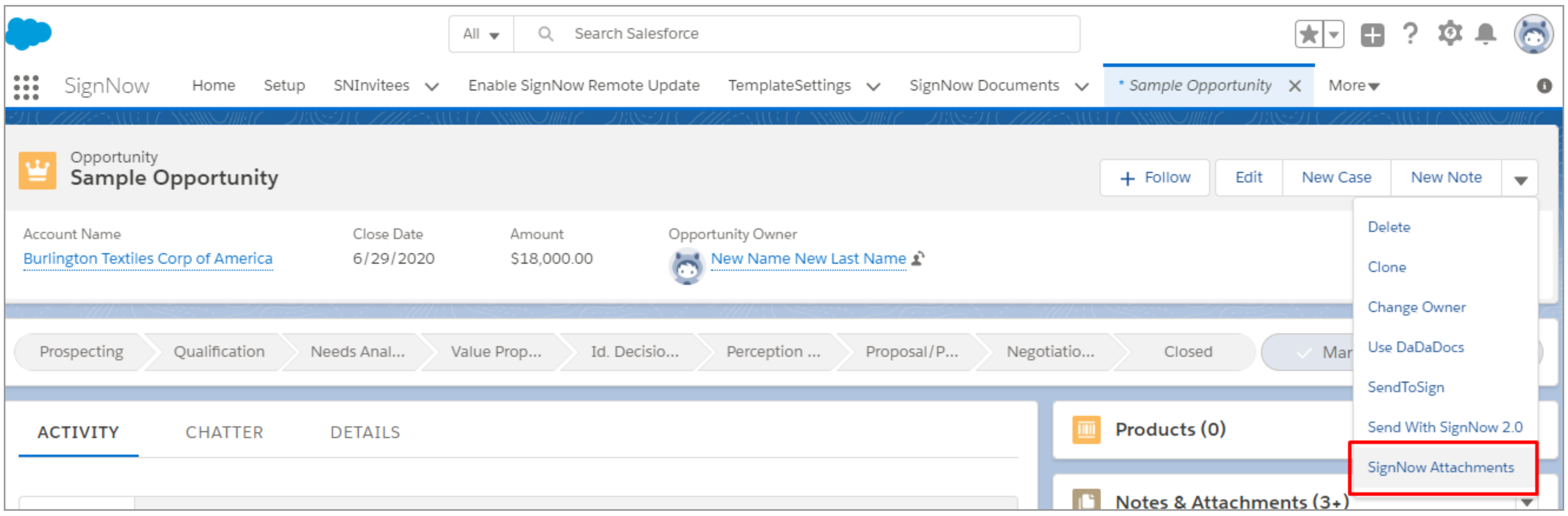
1. In your object, click on the *Send with SignNow* button.



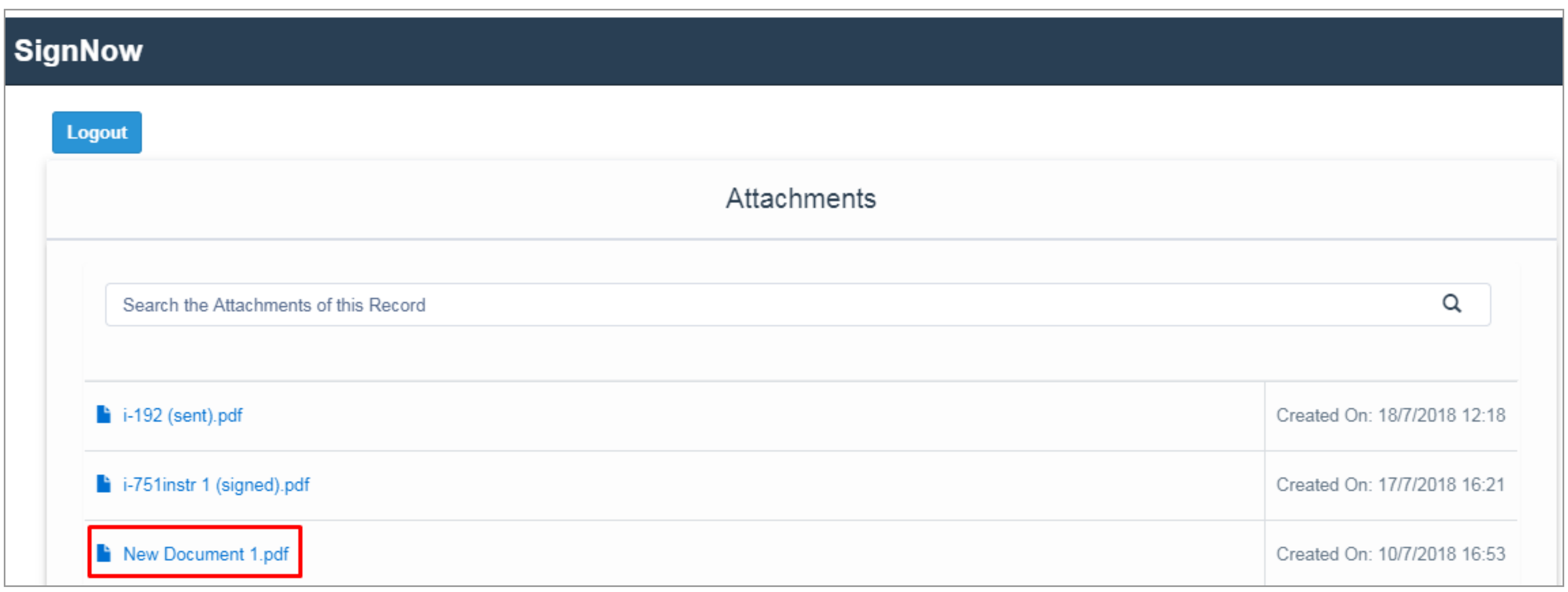
2. The Template tab will open. In the Select Option dropdown menu, select your desired template, choose Salesforce Annotations to add Salesforce annotation fields to your document in SignNow.



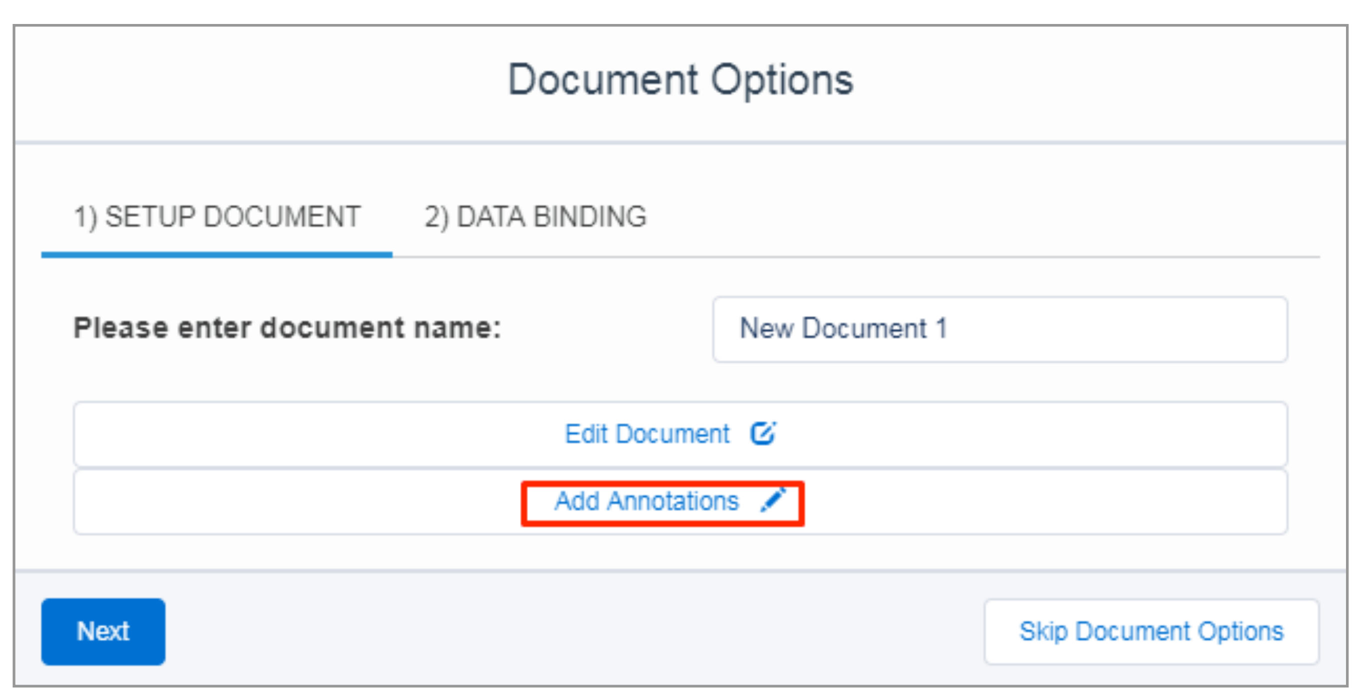
Alternatively, on your Salesforce object record page, click the SignNow Attachments button.



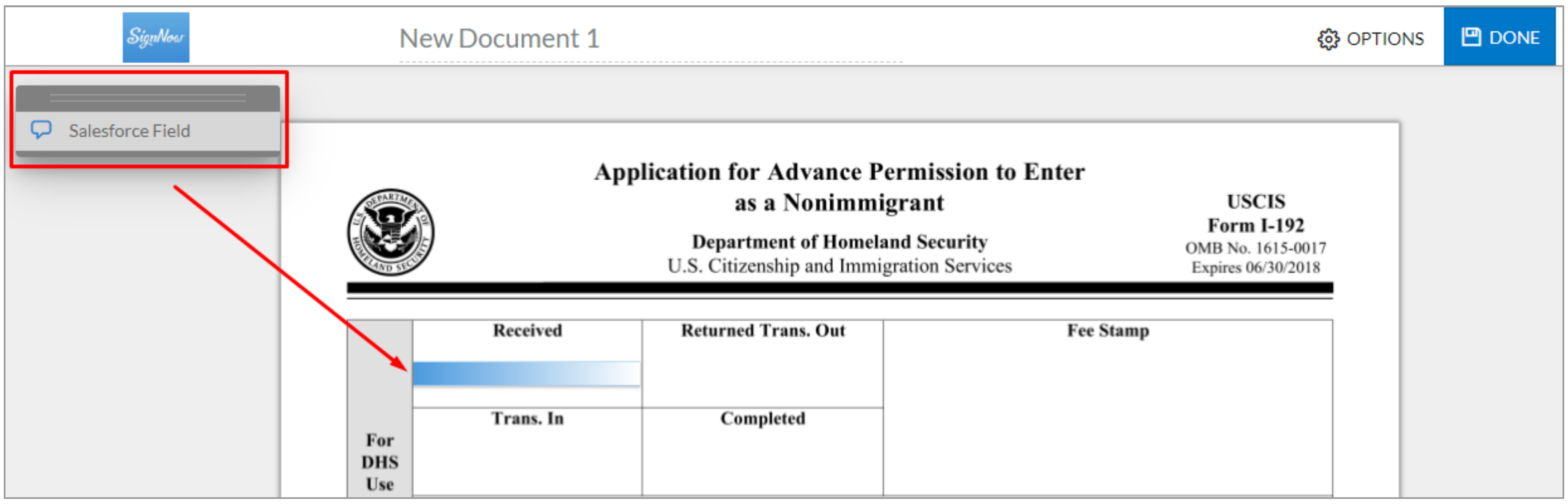
In the Attachments tab, click on the template you want to add Salesforce Annotations to.



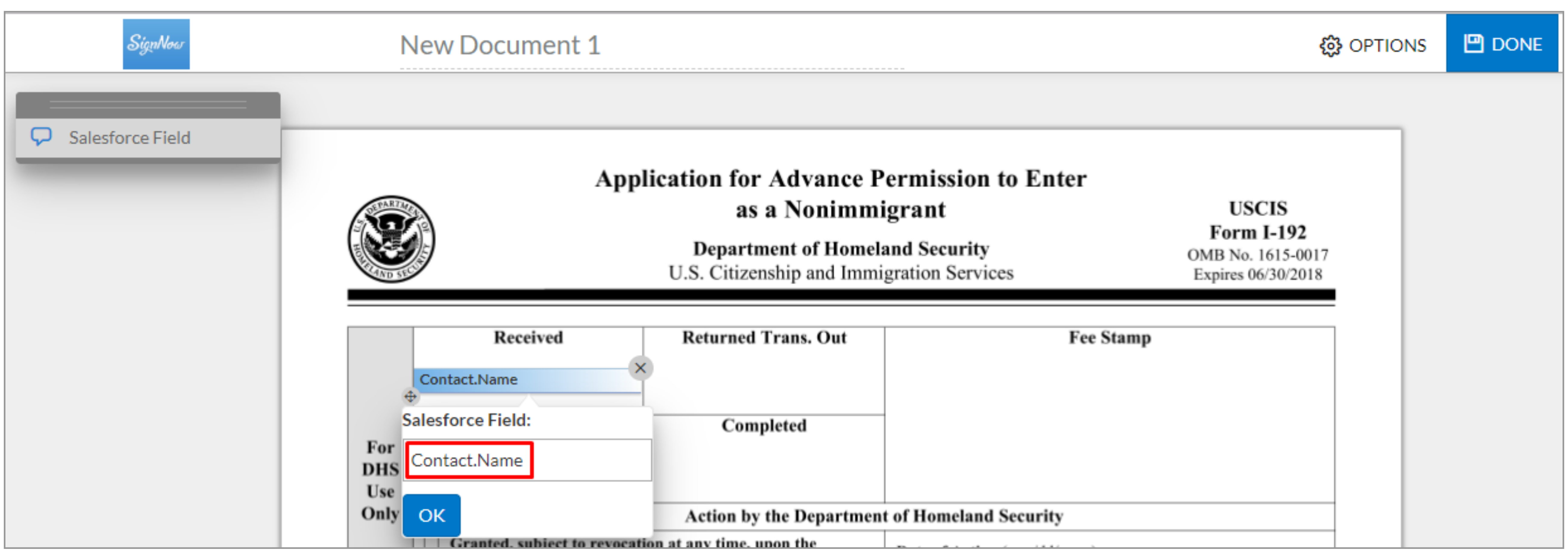
In the Document Options section, click the Add Annotations button at the bottom.



3. Once the template has been opened, click Salesforce Field in the upper left corner. Then, drag and drop the field wherever you need in the document.

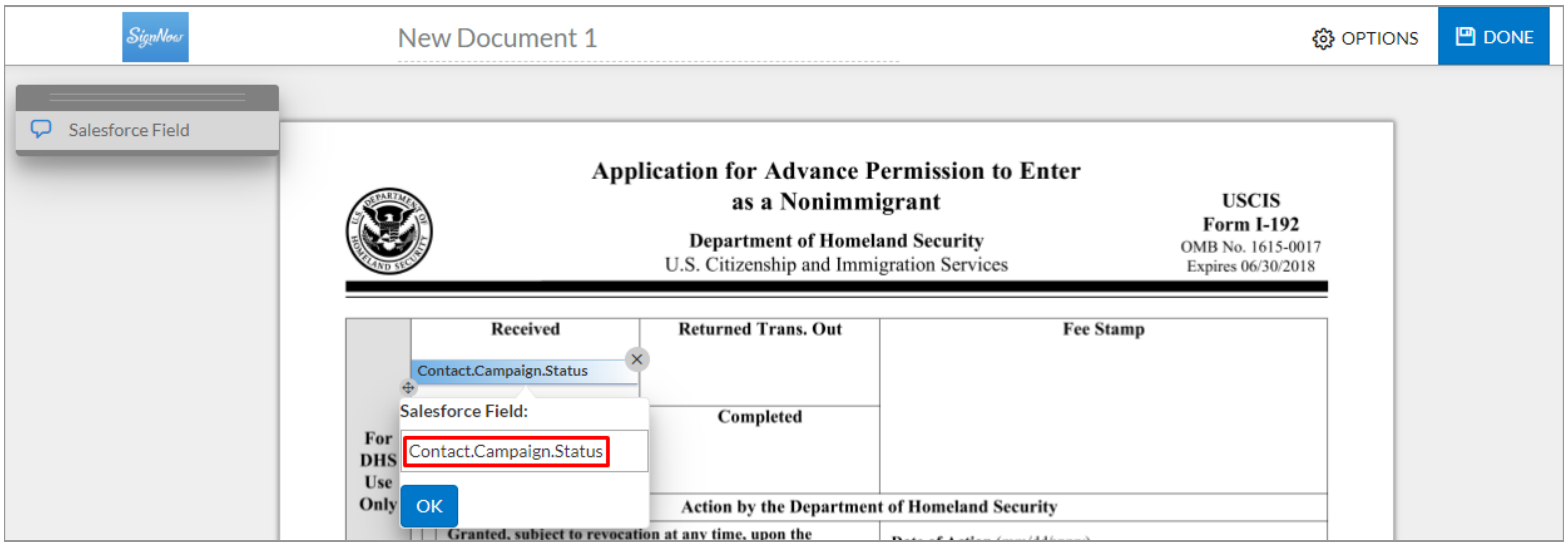


4. In the field you've added, specify the Salesforce object and the Salesforce object record field which the Salesforce annotation field will be populated with. It is required to enter the object's name first, then type the field's name you want to get data from, separating them with a full stop.



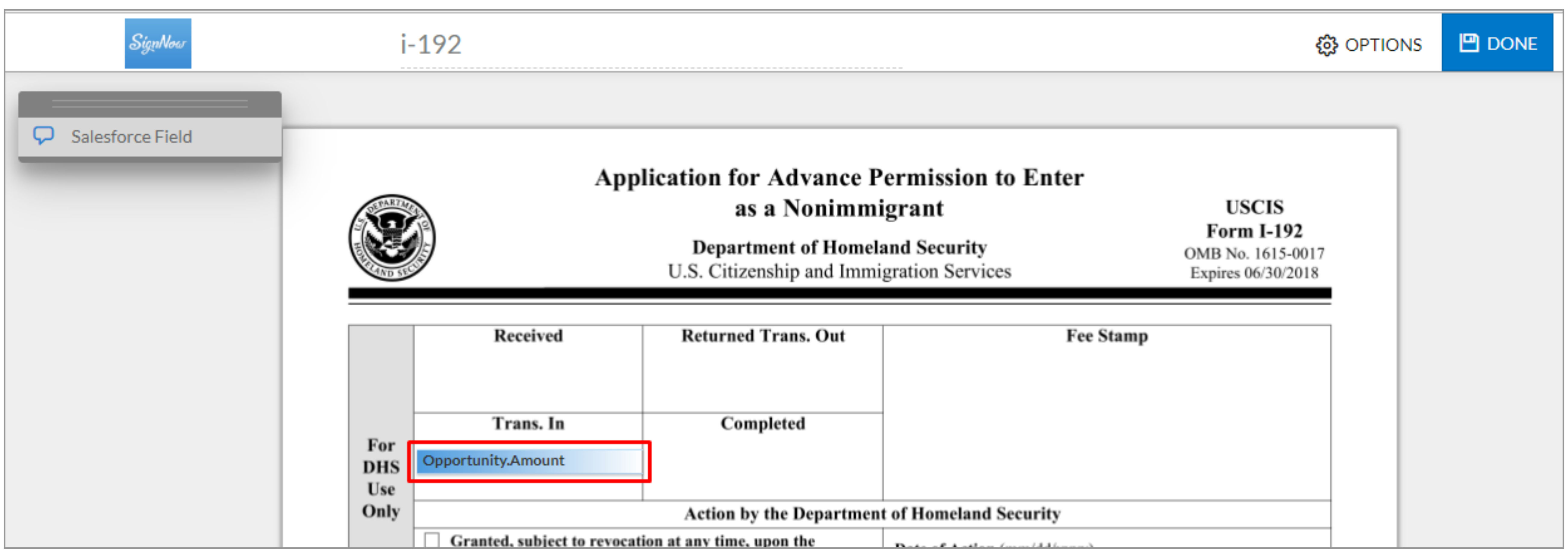
When the Salesforce object and field names have been specified, click *OK*.

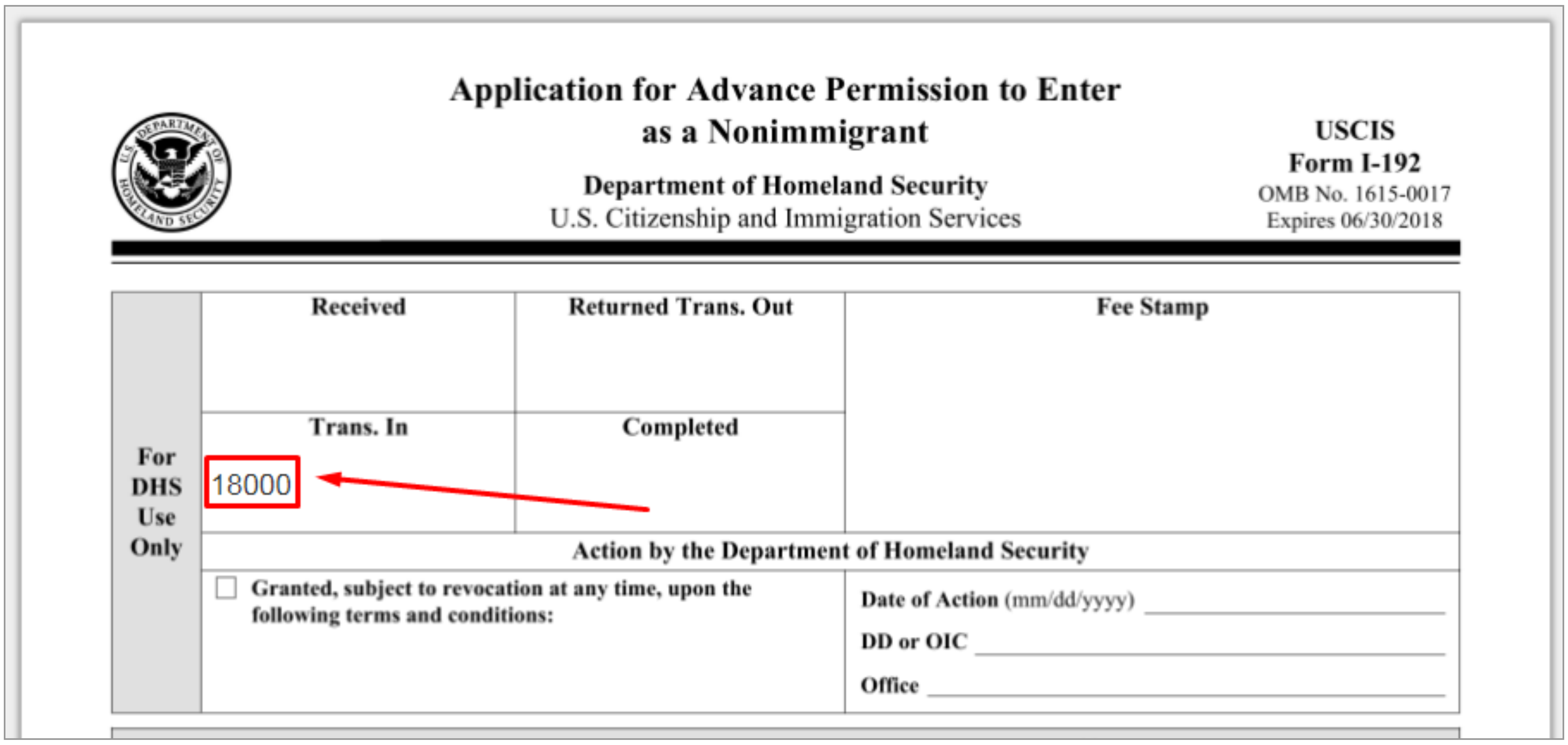
Note: You can connect information from the current object as well as from its parent objects to the Salesforce annotations. In this case, you have to enter the current object's name, its parent object's name and then specify the needed Salesforce field's name.



Once the Salesforce Annotations fields have been added, click Done in the upper right corner to save your settings.

That's it! Now you can send your template out for signing to recipients. When they open your document, it will have its Salesforce Annotations fields populated with data from the specified Salesforce object.



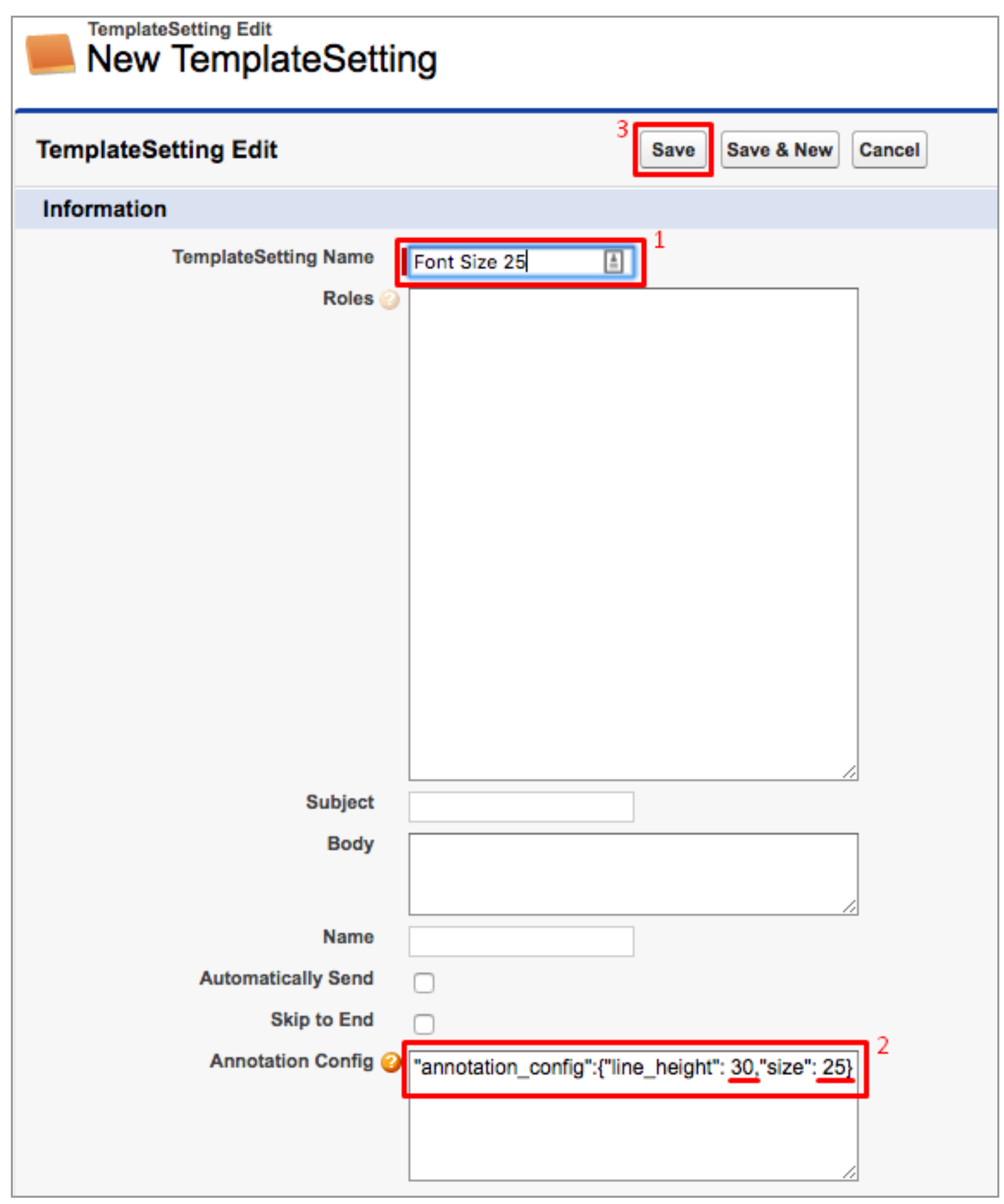


If you want to customize the line height or font size of the text to be added, go to the TemplateSettings section in the main menu. Then choose New to create a new TemplateSetting.

In the window that will open next enter the TemplateSetting name, then skip to the Annotation Config section and specify the desirable line height as well as font size for the text to be added using the following syntax:

```
"annotation_config":{
"line_height": 30,
"size": 25}
```

When finished, click Save.



That’s it! Now the font size of text to be added to the Salesforce Annotations fields will be exactly you’ve specified in your TemplateSettings.

Document Status

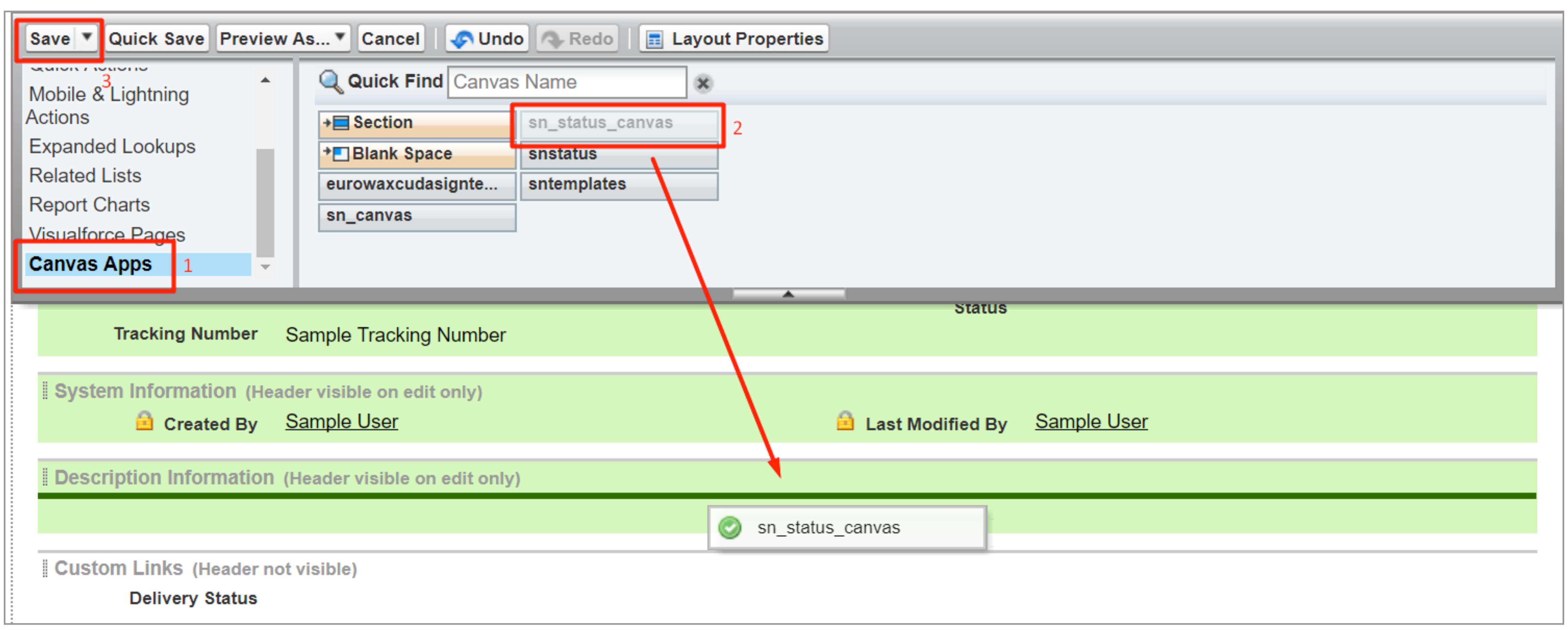
Easily track the status of your documents you have sent out to be e-signed as well as instantly get all details about documents sent such. To do this, just add SignNow Status canvas or SignNowStatuses to your object page.

Canvas Status

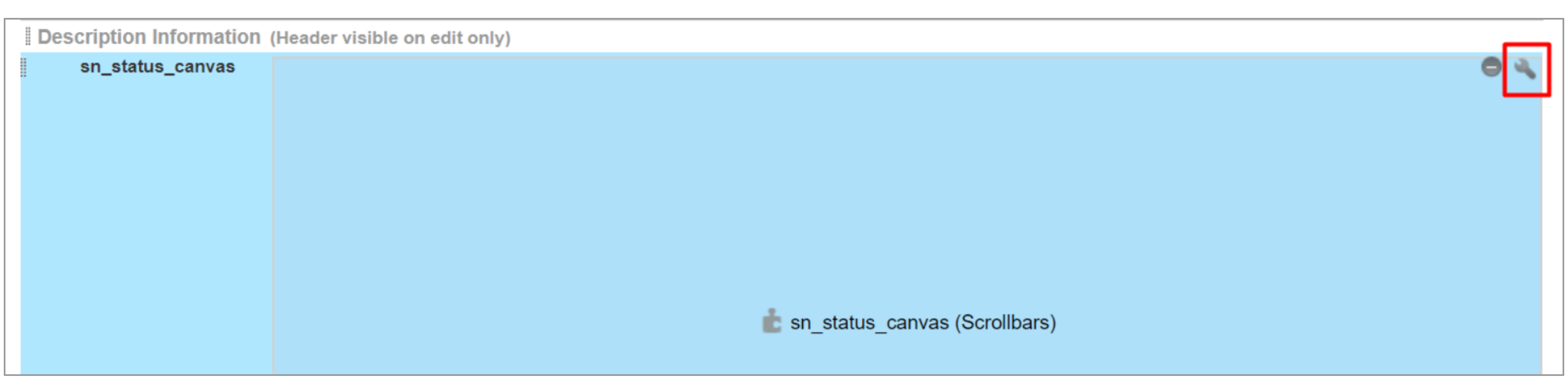
View, update or cancel your signature requests as well as download signed documents directly in the SignNow Status canvas. All the sent requests are shown in the table with the following details: name of the document (or group of documents), recipient email(s), status (pending or fulfilled), date sent, date signed and date of expiration.

Follow these steps to add it to your record page. On your object page click *Edit Layout* (alternatively, use Quick Find to select the object page and then click *Edit*).

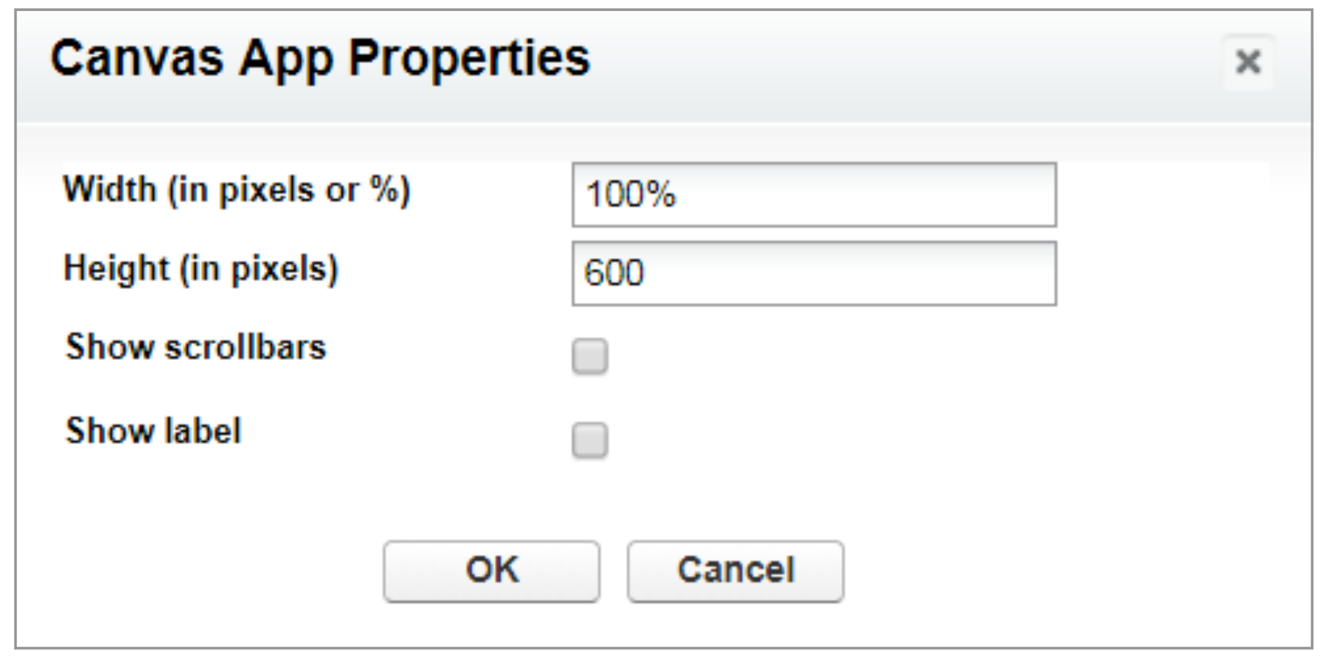
Select Canvas Apps, find sn_status_canvas, drag and drop it in the object information area.



Click on the wrench icon to set your sn_status_canvas properties.



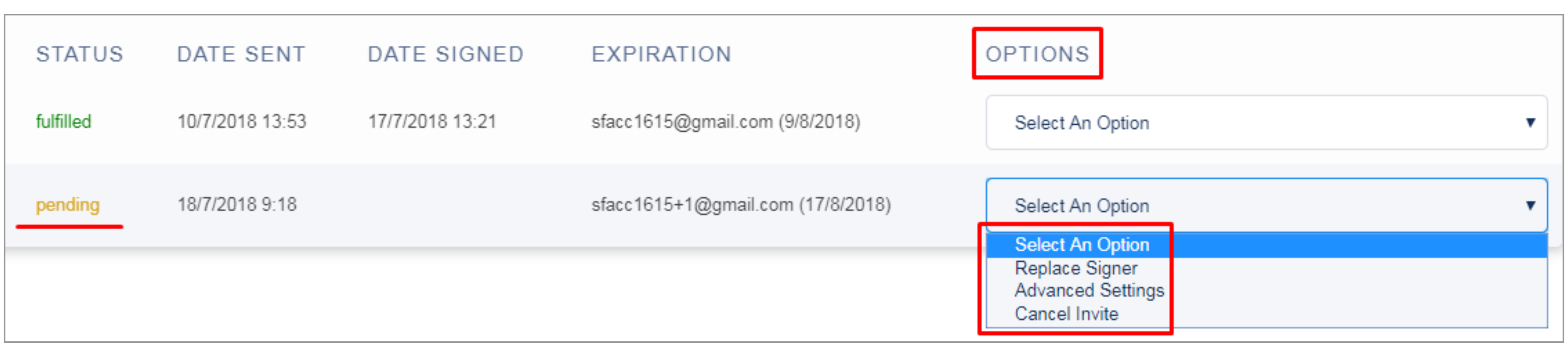
You can set the width and height as well as enabling or disabling scrollbars and the label. It is recommended to set a height of at least 600 pixels as anything smaller may limit some canvas functionality. Click *OK* to apply changes.



That's it! Now the Sign Status canvas has been added to your object page. Follow the instruction below to learn how to use it.

1. Update a Signature Request

If you don't hear back from your customers or your documents haven't been signed, you can update or cancel your signature request. To do this, proceed to the document with a pending status and click the Options tab. In the Select an Option dropdown, choose your desired action



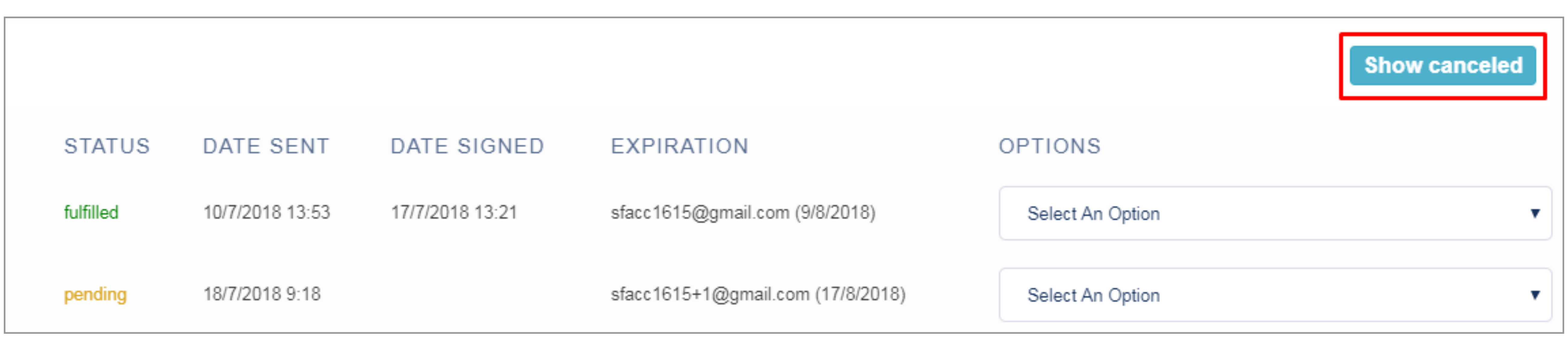
Select *Replace Signer* to replace a recipient. Specify a new email address and click *Submit*.

Select *Advanced settings* to set or change a document password, modify the expiration date or set a reminder for your recipients.

Note: Learn more about how to [add a password to a document in SignNow.]()

Select *Cancel Invite* to cancel an invite and remove it from the list.

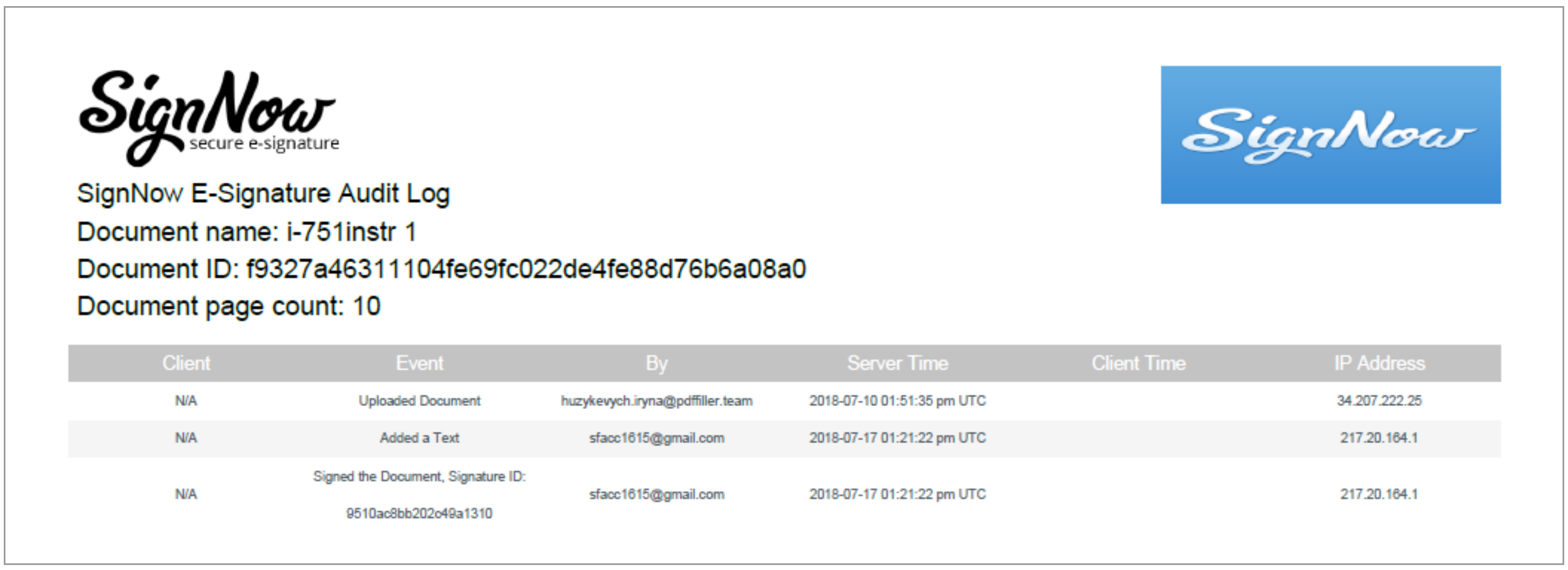
Click *Show Canceled* to display all the invites including the canceled ones.



2. Download Signed Documents

Once a document has been signed by a recipient, you can download it to your computer in a few clicks directly from the Status Canvas. For this, proceed to the Options tab and click the arrow near *Select an Option*. In the dropdown menu, choose *Download Signed Document* to save the document to your device.

Alternatively, select *Download Signed Document with Audit History* to save the document along with all detailed information for changes made.


SignNow secure e-signature

SignNow E-Signature Audit Log
Document name: i-751instr 1
Document ID: f9327a46311104fe69fc022de4fe88d76b6a08a0
Document page count: 10

Client	Event	By	Server Time	Client Time	IP Address
N/A	Uploaded Document	huzykevych.iryna@pdffiller.team	2018-07-10 01:51:35 pm UTC		34.207.222.25
N/A	Added a Text	sfacc1615@gmail.com	2018-07-17 01:21:22 pm UTC		217.20.164.1
N/A	Signed the Document, Signature ID: 9510ac8bb202c49a1310	sfacc1615@gmail.com	2018-07-17 01:21:22 pm UTC		217.20.164.1

SignNow Statuses

Instantly view the status of your documents sent out for e-signing as well as full info for documents such as name, ID, creator, record it is related to etc., with SignNow Statuses.

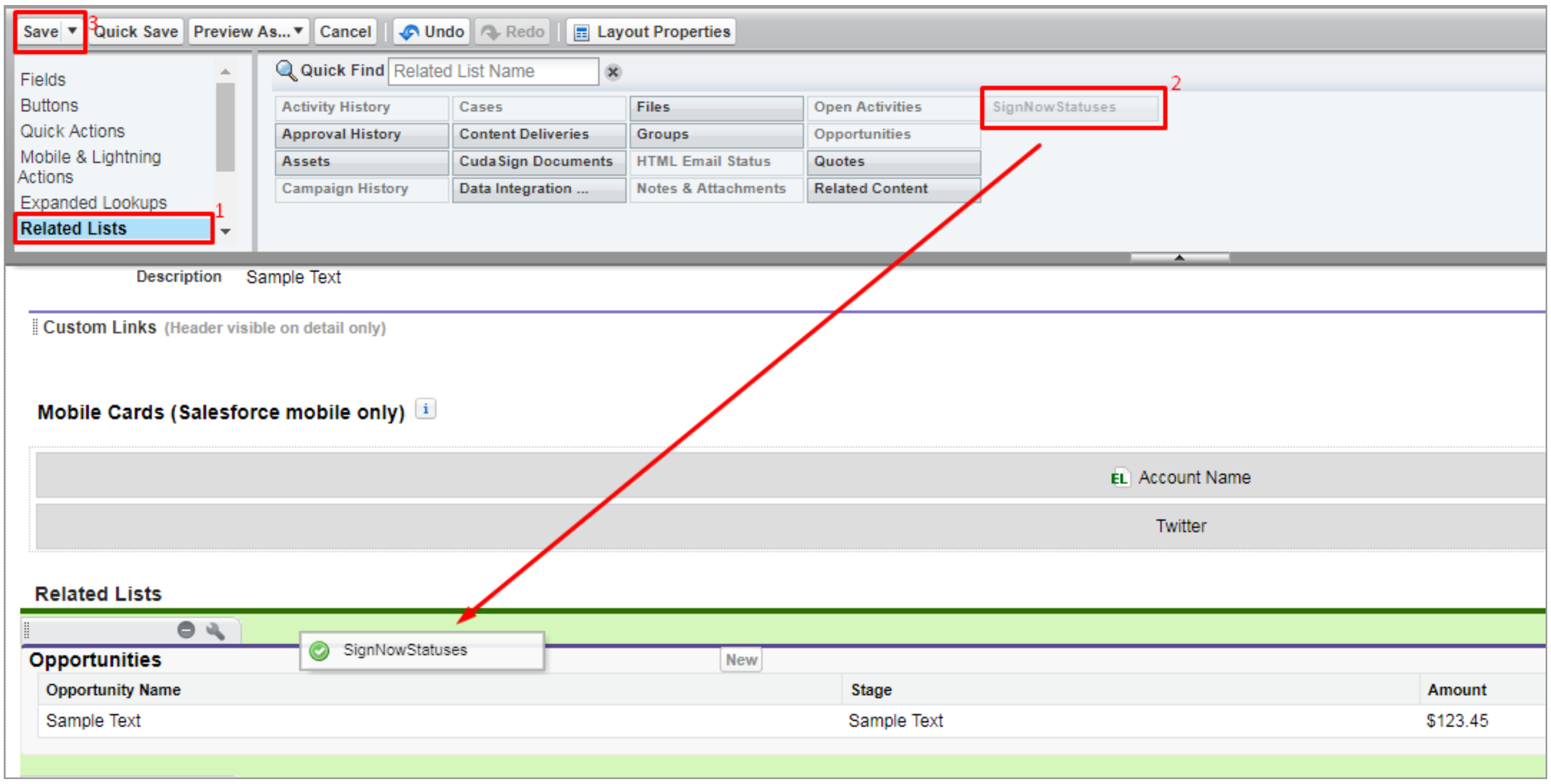
Currently, *SignNowStatuses* are preset for the following objects:

- Contacts
- Leads
- Case
- Solution
- Campaign
- Account
- Contract
- Product

The instructions below will guide you through the process of adding *SignNowStatuses* to the record pages related to the object mentioned above.

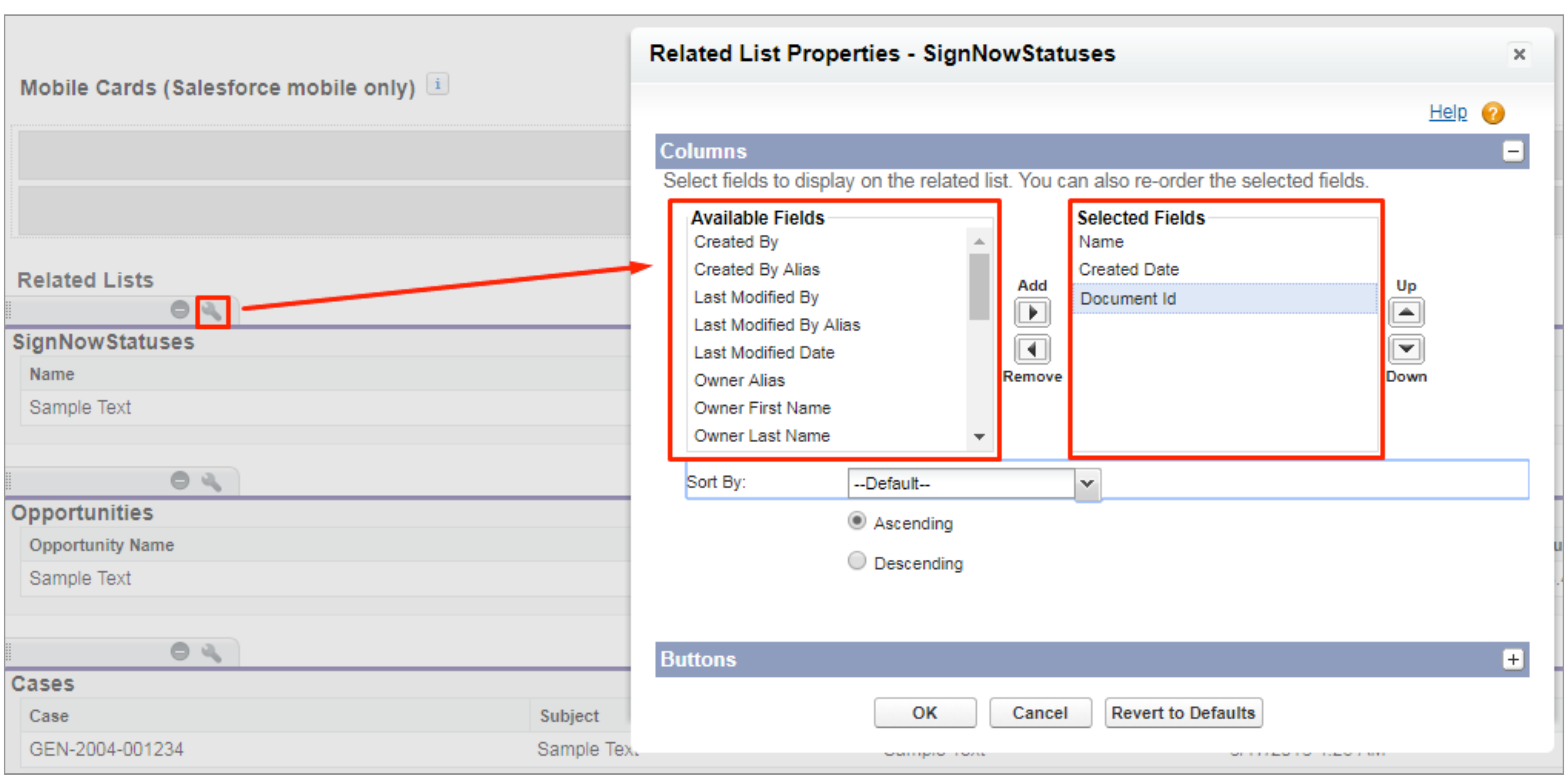
On your object record page click *Edit Layout* (alternatively, use Quick Find to select the object page and then click *Edit*).

Select Related Lists, find *SignNowStatuses*, then drag and drop it in the object information area. Once finished, click *Save*.

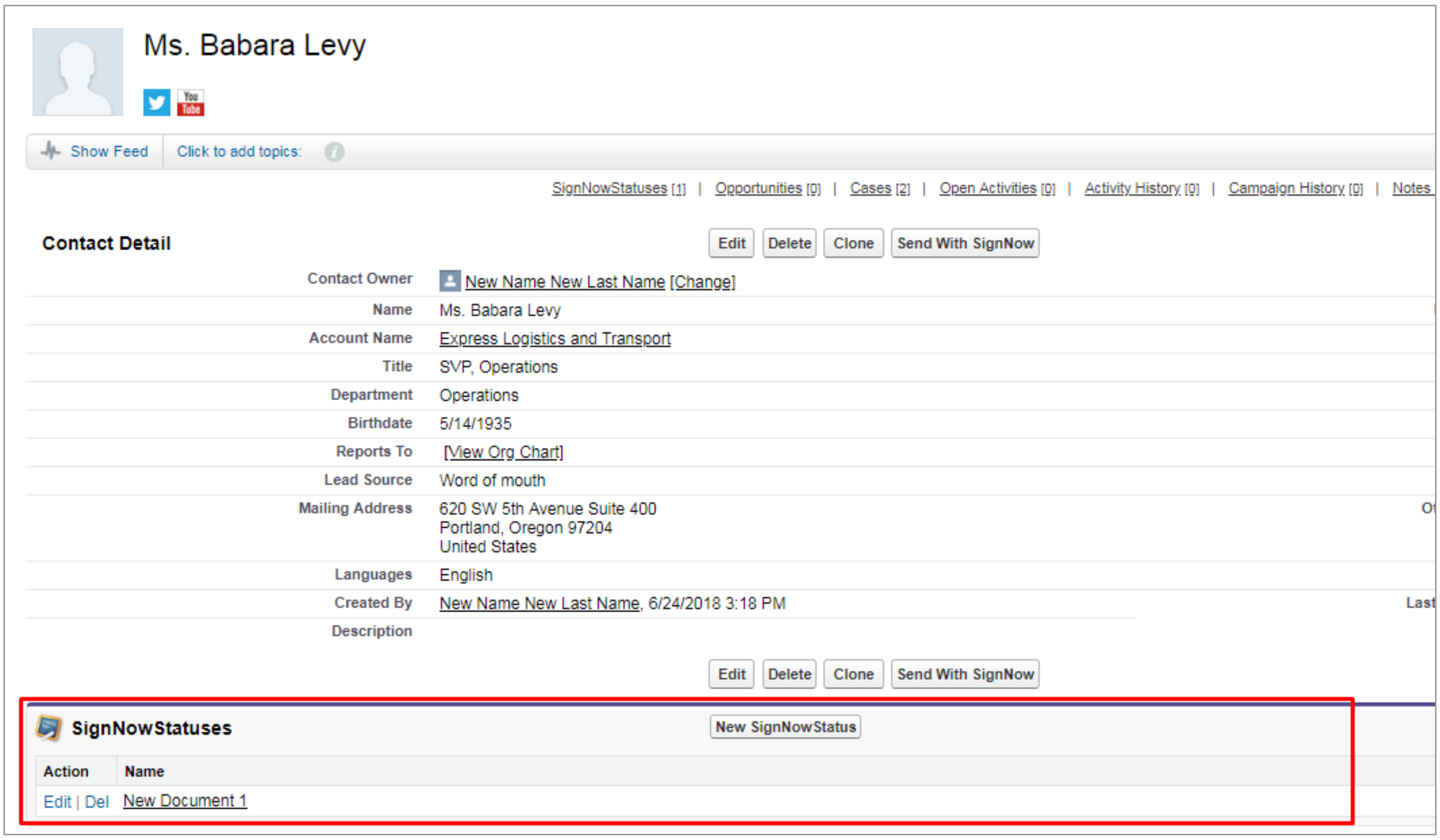


Click on the wrench icon to set the properties for your SignNowStatuses.

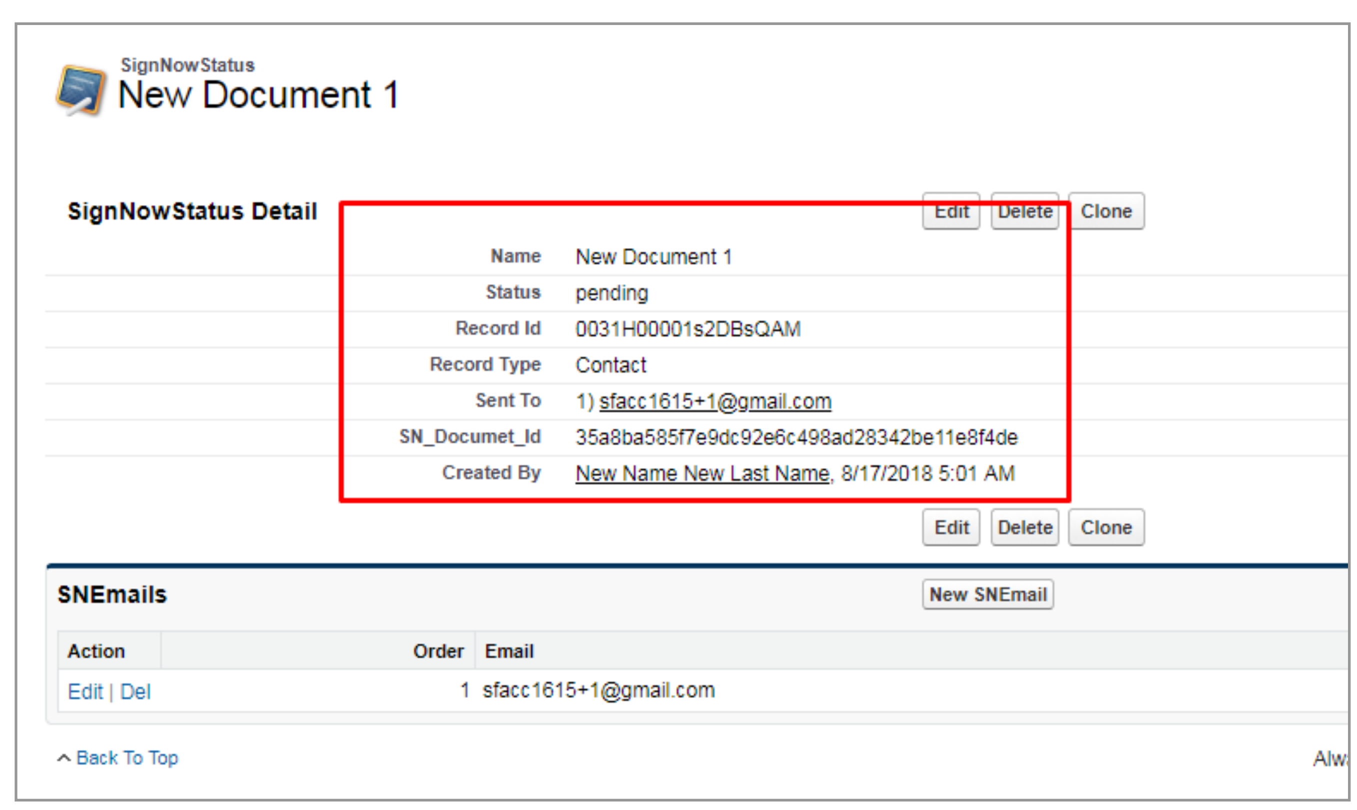
You can select fields to display the related list as well as re-order them.



That's it! SignNowStatuses has now been added to your object record page. Once you have sent a document for e-signing, it will automatically appear in the SignNowStatuses.



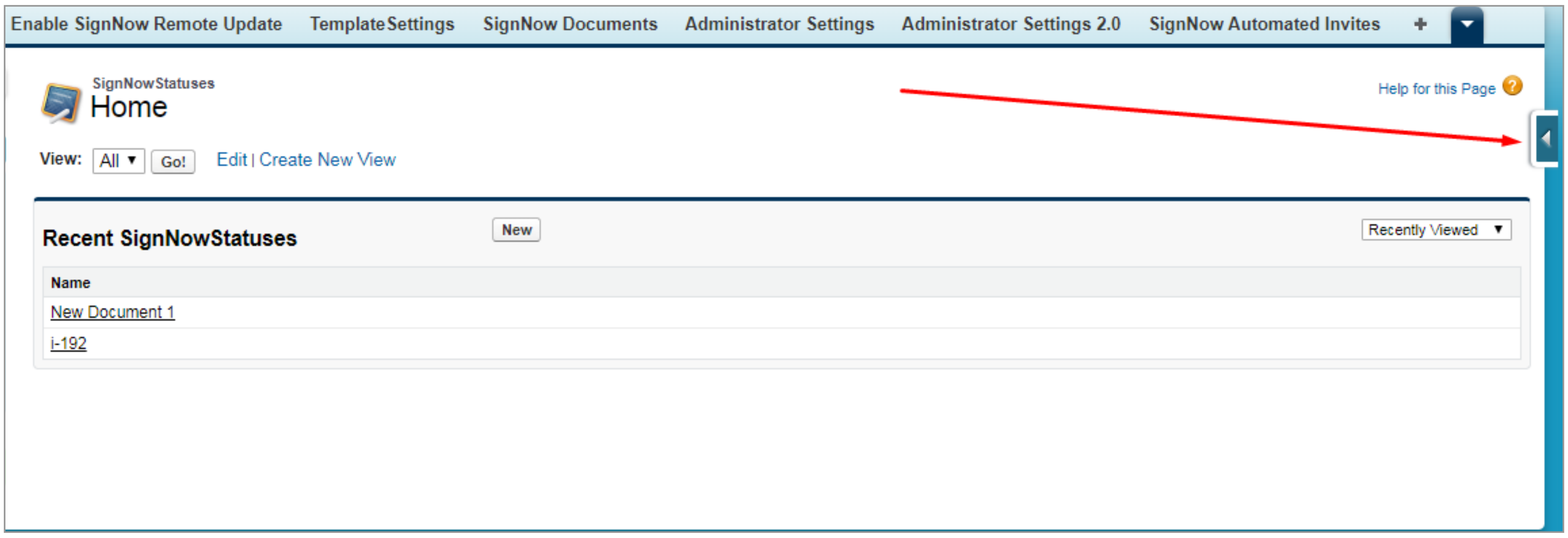
Click on a document to view its status and details.



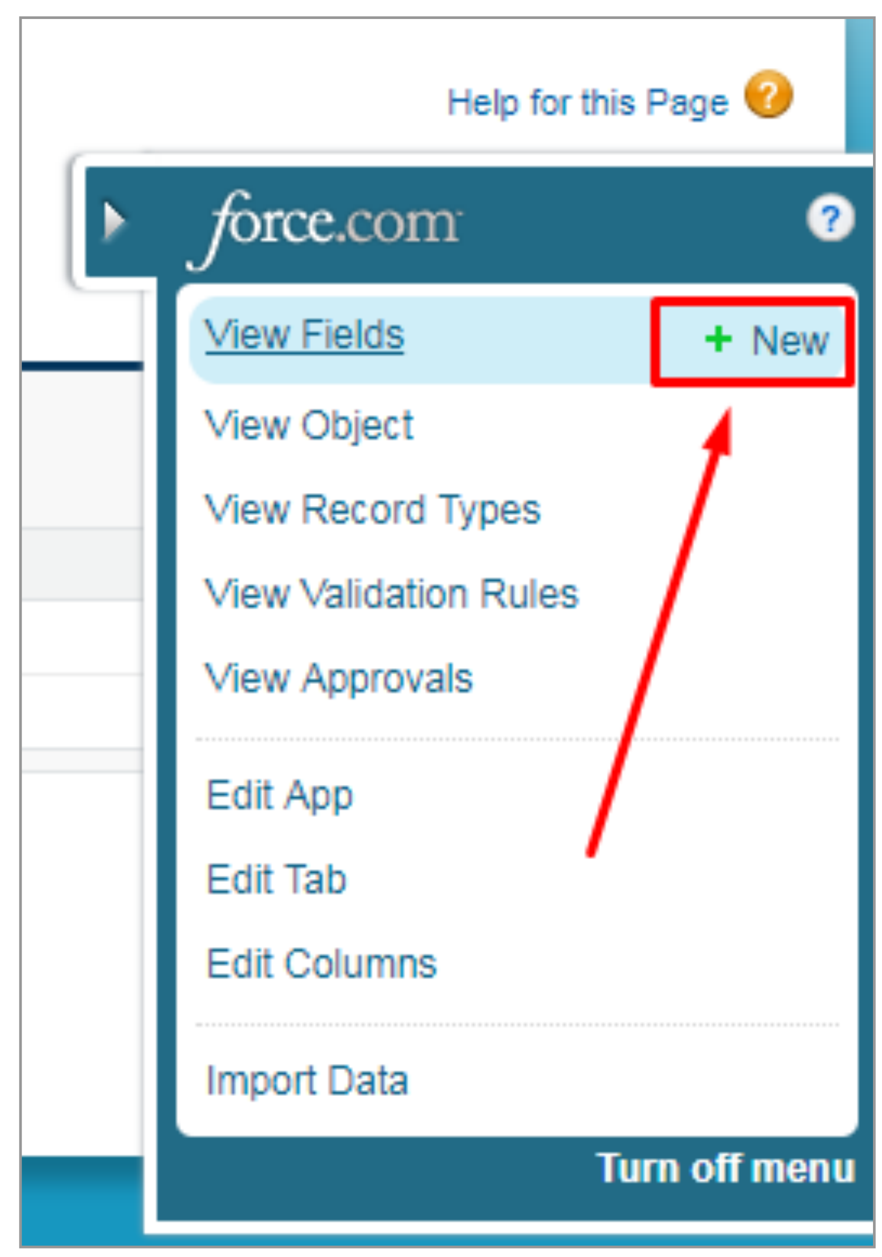
If you want to add SignNowStatuses for objects that are not in the list mentioned above, follow the instructions below.

Switch to the SignNow application and in the main menu choose the SignNowStatuses section. Then, click the arrow icon on the right.

Note: If the SignNowStatuses section doesn't appear in the main menu, click the plus icon and find it in the All Tabs list.



Click on a document to view its status and details.



On the next page, choose the field type by selecting Lookup Relationship and set the object you want to add SignNowStatuses for.

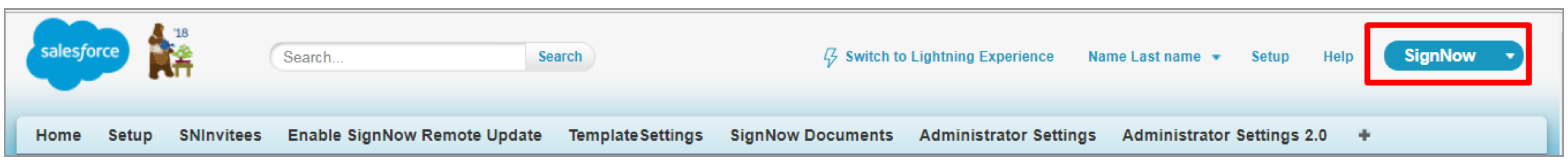
Once you have finished, the SignNowStatuses will be automatically added to your object page.

Administrator Settings

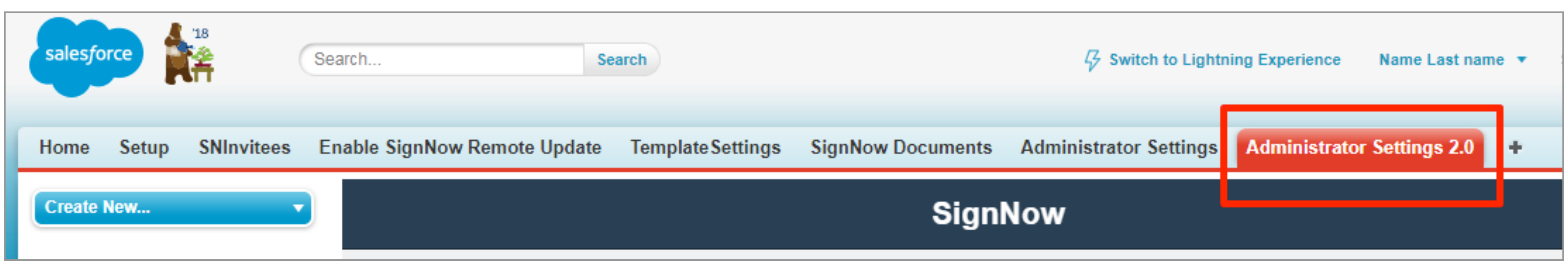
Store Documents in Salesforce Org

Specify the document storage for your SignNow documents. Save SignNow documents in your current Salesforce object record or leave them in your SignNow application.

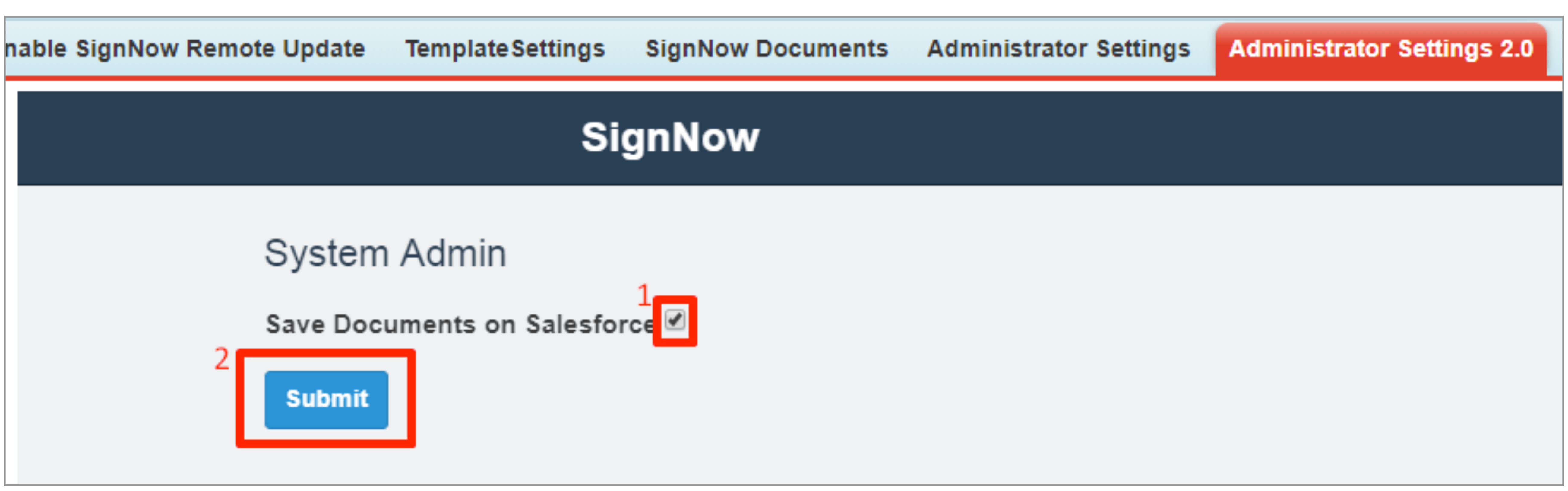
1. In the upper right of your Salesforce org main menu, select SignNow.



2. Select Administrator Settings 2.0 tab.



3. On the page that will open next, uncheck the Save Documents on Salesforce checkbox to save documents in your SignNow application. To save the changes, click the Submit button.



Note: If the Save Documents on Salesforce checkbox remains unchecked, all the documents from your SignNow application will still be automatically saved in your current Salesforce object record.