

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

Table of Contents

| | |
|---|-----------|
| Installation and Configuration | 4 |
| Enable Connected Apps | 7 |
| Create SignNow Buttons | 10 |
| Add the SignNow Buttons to the Object Page Layout | 14 |
| SignNow Buttons Codes and Usage | 17 |
| Send with SignNow | 17 |
| SignNow Pre Selected Template | 26 |
| SignNow Template Settings | 28 |
| <i>How to Set TemplateSettings</i> | 30 |
| SignNow Attachments | 33 |
| SignNow Quotes (for the Quotes object only) | 35 |
| SignNow Bulk Invite | 39 |
| Additional Parameters for Button Codes | 42 |
| Preset CC emails | 42 |
| Edit Preset Emails for Templates | 42 |
| Hide SignNow bar | 43 |
| Redirect to the Salesforce Record Page after Sending an E-Signature Request | 43 |
| Salesforce Data Binding | 44 |
| Salesforce Annotations | 46 |

| | |
|---|-----------|
| Document Status | 51 |
| Canvas Status | 51 |
| SignNow Statuses | 54 |
| Administrator Settings | 58 |
| Store Documents in Salesforce Org | 58 |

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*.

SignNow Electronic Signatures for Salesforce By SignNow

eSign Easily and Securely
Create, review, and send customized documents for eSignature in 3 clicks.

Free

| RATING | LISTED ON | LATEST RELEASE |
|------------|-----------|----------------|
| ★★★★★ (13) | 6/6/2014 | 1/4/2018 |

CATEGORIES
Contract Management

#1 E-Signature Solution for Business – ESign Easily and Securely
Quickly and easily create, review, track and send documents for e-signature. Automatically add Salesforce data to documents. Send from custom objects, quotes, and notes & attachments.

5-Minute Set Up Guide, free to try. Call (800) 831-2050 for info.

Overview Reviews (13)

Free [Save](#) [Watch Demo](#) [Test Drive](#) [Get It Now](#)

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



Install SignNow Electronic Signatures for Salesforce

By SignNow



Install for Admins Only



Install for All Users



Install for Specific Profiles...

| App Name | Publisher | Version Name | Version Number |
|--|-----------|--------------|----------------|
| SignNow Electronic Signatures for Salesforce | SignNow | Spring 2018 | 1.178 |

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.



Install SignNow Electronic Signatures for Salesforce

By SignNow



This app is taking a long time to install.
You will receive an email after the installation has completed.

| App Name | Publisher | Version Name | Version Number |
|--|-----------|--------------|----------------|
| SignNow Electronic Signatures for Salesforce | SignNow | Spring 2018 | 1.178 |

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.

Installed Packages Help for this Page

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

| Action | Package Name | Publisher | Version Number | Namespace Prefix | Install Date | Limits | Apps | Tabs | Objects |
|-----------|-----------------------------------|-----------|----------------|------------------|-------------------|--------------------------|------|------|---------|
| Uninstall | SignNow Description SignNow | SignNow | 1.178 | cuda_signnow | 1/26/2018 5:49 AM | <input type="checkbox"/> | 1 | 7 | 8 |

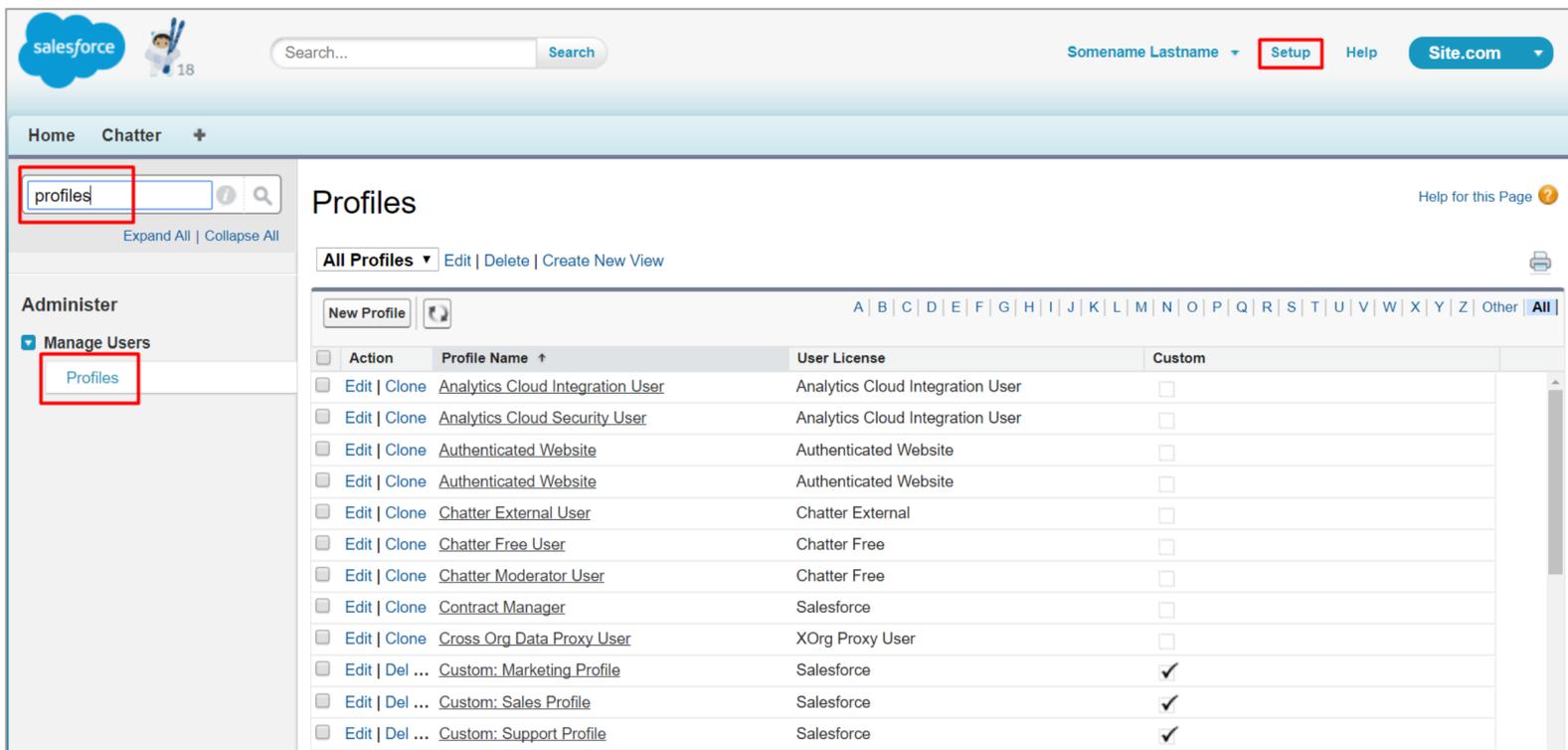
Uninstalled Packages

No uninstalled package data archives

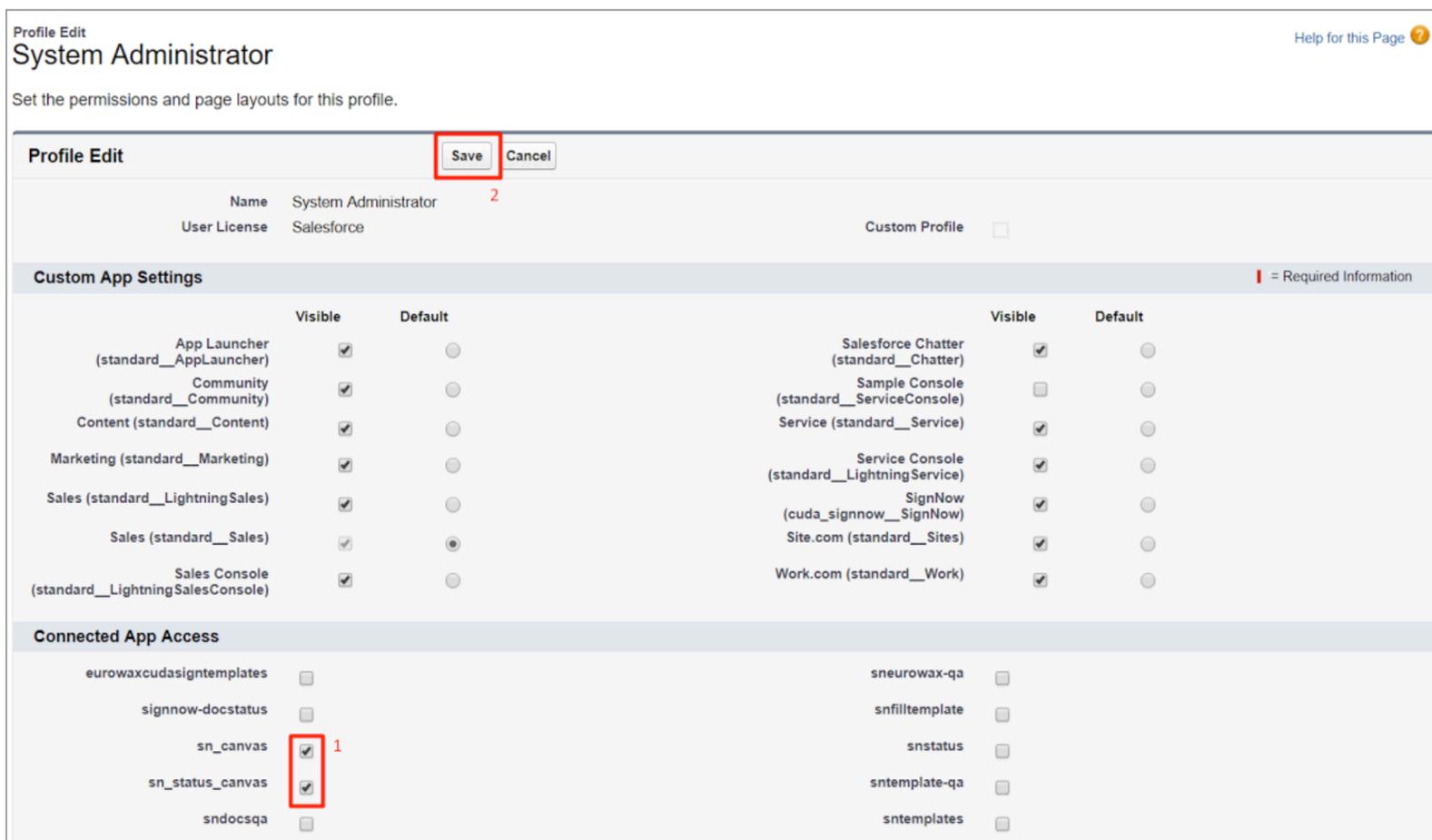
Enable Connected Apps

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.

Connected Apps

Manage access to apps that connect to this Salesforce organization.

App Access Settings Edit

Allow users to install canvas personal apps

View: All Create New View

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

| Action | Master Label ↑ | Application Version | Permitted Users |
|-------------------|--|---------------------|------------------------------|
| Edit | eurowaxcudasigntemplates | 72.0 | All users may self-authorize |
| Edit | signnow-docstatus | 206.0 | All users may self-authorize |
| Edit | sndocsqa | 45.0 | All users may self-authorize |
| Edit | sneurowax-qa | 45.0 | All users may self-authorize |
| Edit | snfilltemplate | 201.0 | All users may self-authorize |
| Edit | snstatus | 200.0 | All users may self-authorize |
| Edit | sntemplate-qa | 45.0 | All users may self-authorize |
| Edit | sntemplates | 200.0 | All users may self-authorize |
| Edit | sn_canvas | 5.0 | All users may self-authorize |
| Edit | sn_status_canvas | 5.0 | All users may self-authorize |

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.

OAuth policies

Permitted Users Admin approved users are pre-authorized 1

Enable Single Logout

IP Relaxation Relax IP restrictions 2

Refresh Token Policy:

- Refresh token is valid until revoked
- Immediately expire refresh token
- Expire refresh token if not used for Day(s)
- Expire refresh token after Day(s)

Session Policies

Timeout Value --None--

High assurance session required

Custom Connected App Handler

Apex Plugin Class

Run As

User Provisioning Settings

Enable User Provisioning

Save Cancel 3

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

Connected Apps Help for this Page ?

Manage access to apps that connect to this Salesforce organization.

App Access Settings Edit

Allow users to install canvas personal apps

View: All ▾ [Create New View](#)

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

| Action | Master Label ↑ | Application Version | Permitted Users |
|-------------|--|---------------------|---|
| Edit | eurowaxcudasigntemplates | 72.0 | All users may self-authorize |
| Edit | signnow-docstatus | 206.0 | All users may self-authorize |
| Edit | sndocsqa | 45.0 | All users may self-authorize |
| Edit | sneurowax-qa | 45.0 | All users may self-authorize |
| Edit | snfilltemplate | 201.0 | All users may self-authorize |
| Edit | snstatus | 200.0 | All users may self-authorize |
| Edit | sntemplate-qa | 45.0 | All users may self-authorize |
| Edit | sntemplates | 200.0 | All users may self-authorize |
| Edit | sn_canvas | 5.0 | Admin approved users are pre-authorized |
| Edit | sn_status_canvas | 5.0 | All users may self-authorize |

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.

OAuth policies

Permitted Users Admin approved users are pre-authorized ▾ 1

Enable Single Logout 1

IP Relaxation Relax IP restrictions ▾ 2

Refresh Token Policy:

- Refresh token is valid until revoked
- Immediately expire refresh token
- Expire refresh token if not used for Day(s) ▾
- Expire refresh token after Day(s) ▾

Session Policies

Timeout Value --None-- ▾ High assurance session required

Custom Connected App Handler

Apex Plugin Class 🔍 ⓘ

Run As 🔍 ⓘ

User Provisioning Settings

Enable User Provisioning ⓘ

Save Cancel 3

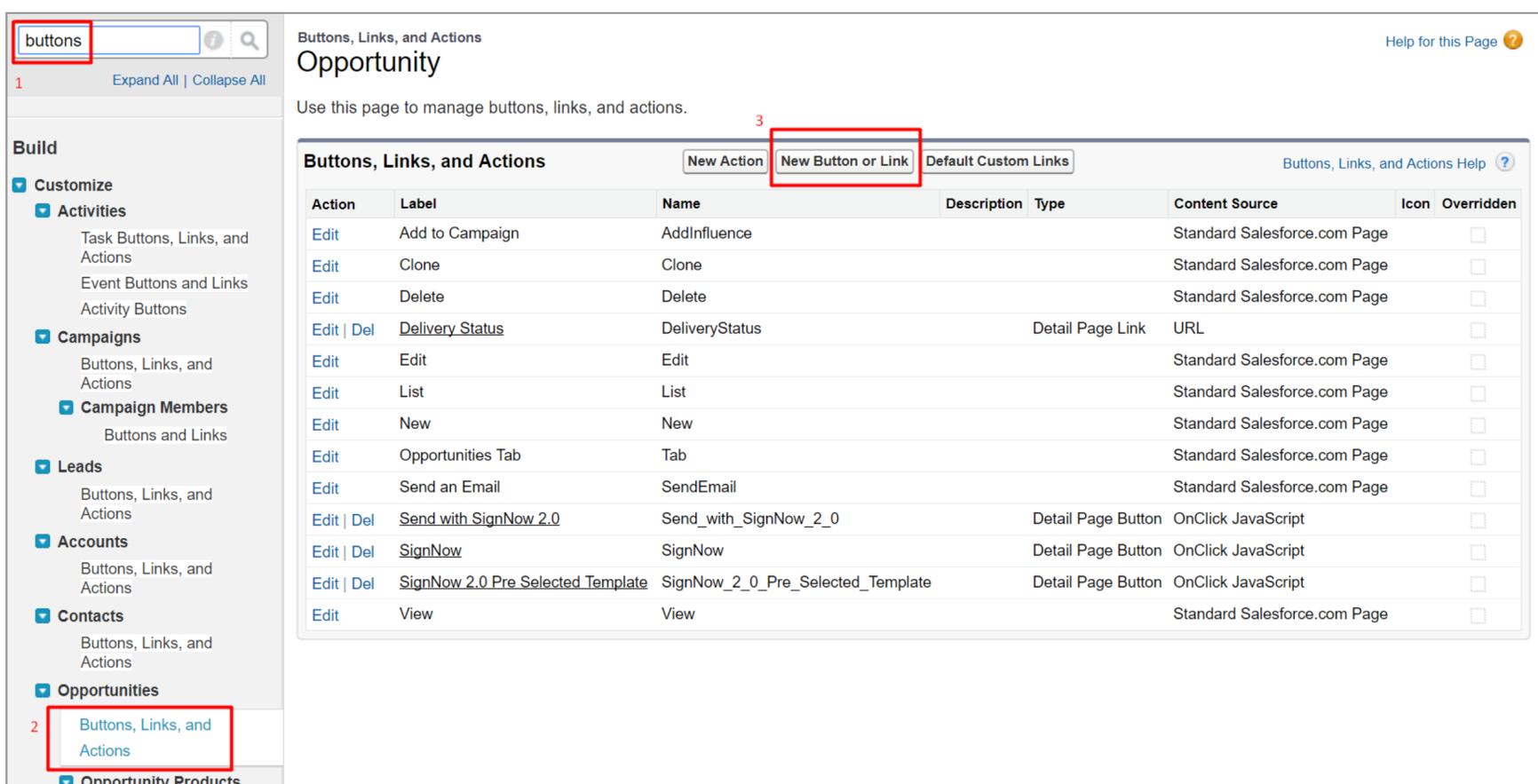
Now you can add SignNow buttons to your objects to use the SignNow application directly from your record pages.

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*.



Buttons, Links, and Actions
Opportunity

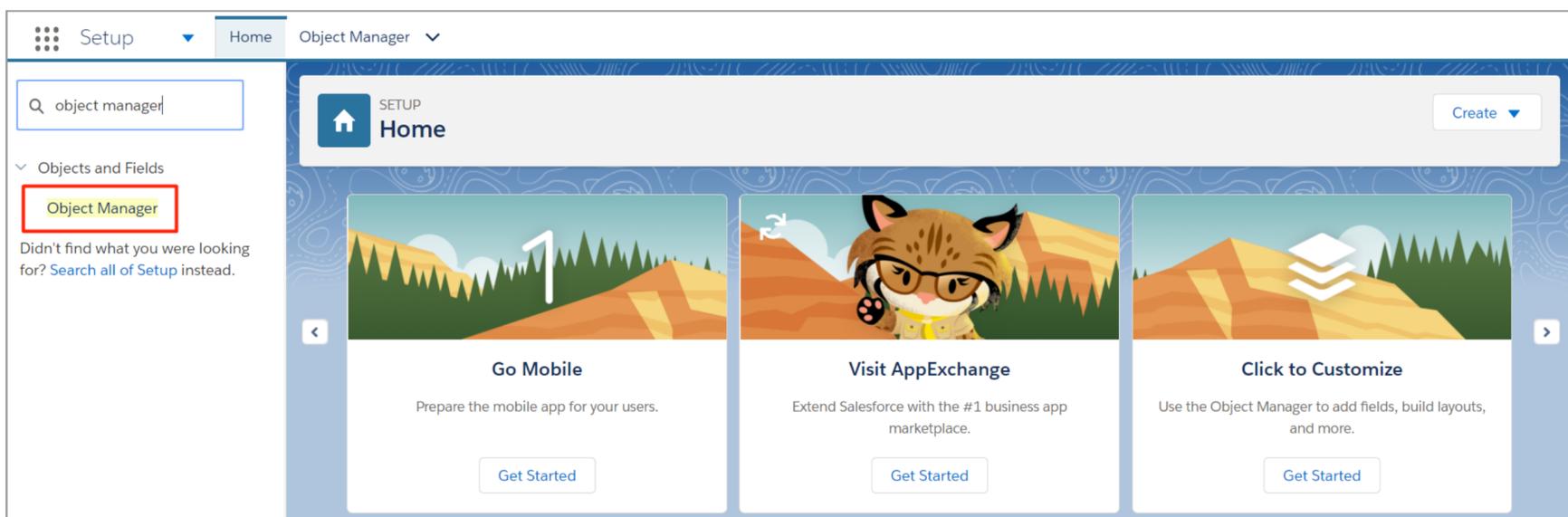
Use this page to manage buttons, links, and actions.

Buttons, Links, and Actions New Action New Button or Link Default Custom Links Buttons, Links, and Actions Help

| Action | Label | Name | Description | Type | Content Source | Icon | Overridden |
|------------|-----------------------------------|-----------------------------------|-------------|--------------------|------------------------------|------|--------------------------|
| Edit | Add to Campaign | AddInfluence | | | Standard Salesforce.com Page | | <input type="checkbox"/> |
| Edit | Clone | Clone | | | Standard Salesforce.com Page | | <input type="checkbox"/> |
| Edit | Delete | Delete | | | Standard Salesforce.com Page | | <input type="checkbox"/> |
| Edit Del | Delivery Status | DeliveryStatus | | Detail Page Link | URL | | <input type="checkbox"/> |
| Edit | Edit | Edit | | | Standard Salesforce.com Page | | <input type="checkbox"/> |
| Edit | List | List | | | Standard Salesforce.com Page | | <input type="checkbox"/> |
| Edit | New | New | | | Standard Salesforce.com Page | | <input type="checkbox"/> |
| Edit | Opportunities Tab | Tab | | | Standard Salesforce.com Page | | <input type="checkbox"/> |
| Edit | Send an Email | SendEmail | | | Standard Salesforce.com Page | | <input type="checkbox"/> |
| Edit Del | Send with SignNow 2.0 | Send_with_SignNow_2_0 | | Detail Page Button | OnClick JavaScript | | <input type="checkbox"/> |
| Edit Del | SignNow | SignNow | | Detail Page Button | OnClick JavaScript | | <input type="checkbox"/> |
| Edit Del | SignNow 2.0 Pre Selected Template | SignNow_2_0_Pre_Selected_Template | | Detail Page Button | OnClick JavaScript | | <input type="checkbox"/> |
| Edit | View | View | | | Standard Salesforce.com Page | | <input type="checkbox"/> |

Lightning Interface

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



Setup Home Object Manager

object manager

Object Manager

Didn't find what you were looking for? Search all of Setup instead.

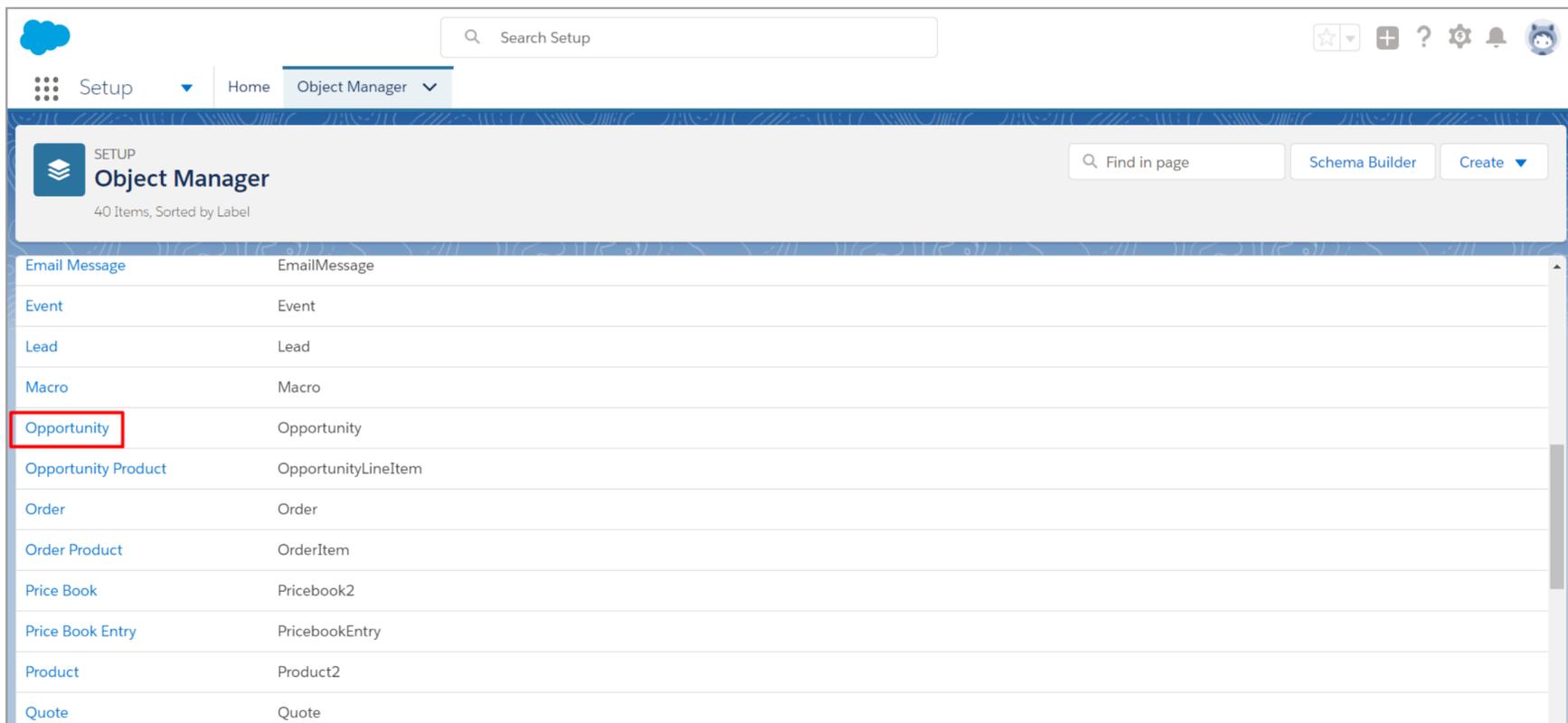
SETUP Home Create

Go Mobile Prepare the mobile app for your users. Get Started

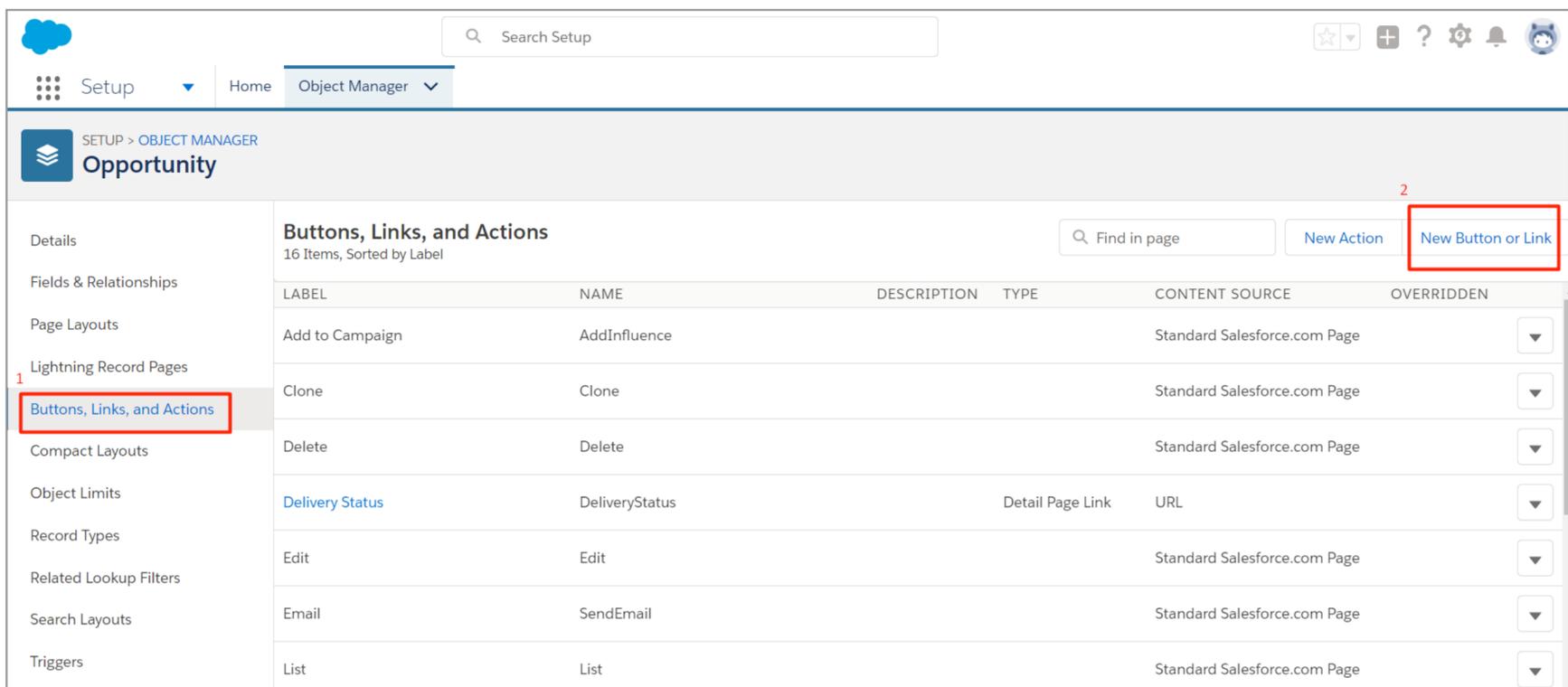
Visit AppExchange Extend Salesforce with the #1 business app marketplace. Get Started

Click to Customize Use the Object Manager to add fields, build layouts, and more. Get Started

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.

Custom Button or Link Edit [Save] [Quick Save] [Preview] [Cancel]

Label ¹ Send With SignNow 2.0

Name Send_With_SignNow_2_0 ⓘ

Description

Display Type

Detail Page Link [View example](#)

² Detail Page Button [View example](#)

List Button [View example](#)

Behavior ³ Display in existing window without sidebar or header [View Behavior Options](#)

Content Source ⁴ URL

Select Field Type: Opportunity

Insert Field: -- Insert Merge Field --

Insert Operator: ▼

⁵ `https://cuda-signnow.na73.visual.force.com/apex/signnow_templates?id={!Opportunity.Id}&type=opportunity`

⁶

Functions: -- All Function Categories --

- ABS
- ADDMONTHS
- AND
- BEGINS
- BLANKVALUE
- CASE

[Insert Selected Function]

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 "--".

Custom Button or Link Edit

[Save](#) [Quick Save](#) [Preview](#) [Cancel](#)

Label

Name ⓘ

Description

Display Type
 Detail Page Link [View example](#)
 Detail Page Button [View example](#)
 List Button [View example](#)

Behavior [View Behavior Options](#)

Content Source

Select Field Type

Insert Field

Insert Operator

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).

1

Expand All | Collapse All

Administer

- Company Profile
- Company Information 2
- Fiscal Year
- Business Hours
- Holidays
- Language Settings
- Data Protection and Privacy New!

Company Information

Company Name Here

The organization's profile is below.

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(0\)](#)

[Edit](#) [Deactivate Org](#)

| Organization Detail | |
|---------------------------------------|---|
| Organization Name | Company Name Here |
| Primary Contact | Name Last Name |
| Division | |
| Address | US |
| Fiscal Year Starts In | January |
| Activate Multiple Currencies | <input type="checkbox"/> |
| Newsletter | <input checked="" type="checkbox"/> |
| Admin Newsletter | <input checked="" type="checkbox"/> |
| Hide Notices About System Maintenance | <input type="checkbox"/> |
| Hide Notices About System Downtime | <input type="checkbox"/> |
| Phone | |
| Fax | |
| Default Locale | English (United States) |
| Default Language | English |
| Default Time Zone | (GMT-07:00) Pacific Daylight Time (America/Los_Angeles) |
| Currency Locale | English (United States) - USD |
| Used Data Space | 324 KB (6%) [View] |
| Used File Space | 3.3 MB (16%) [View] |
| API Requests, Last 24 Hours | 0 (15,000 max) |
| Streaming API Events, Last 24 Hours | 0 (10,000 max) |
| Restricted Logins, Current Month | 0 (0 max) |
| Salesforce.com Organization ID | 00D6A000002jEqa |
| Organization Edition | Developer Edition |
| Instance | NA50 3 |
| Created By | Name Last Name, 3/19/2018 12:41 AM |
| Modified By | Name Last Name, 3/19/2018 12:57 AM |

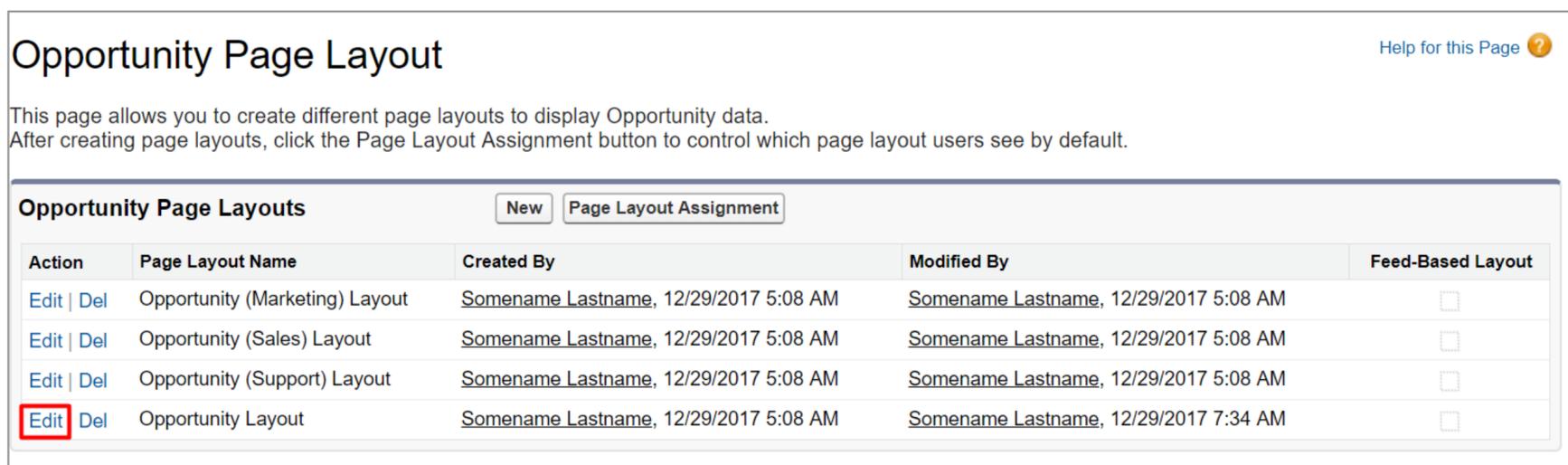
[Edit](#) [Deactivate Org](#)

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.



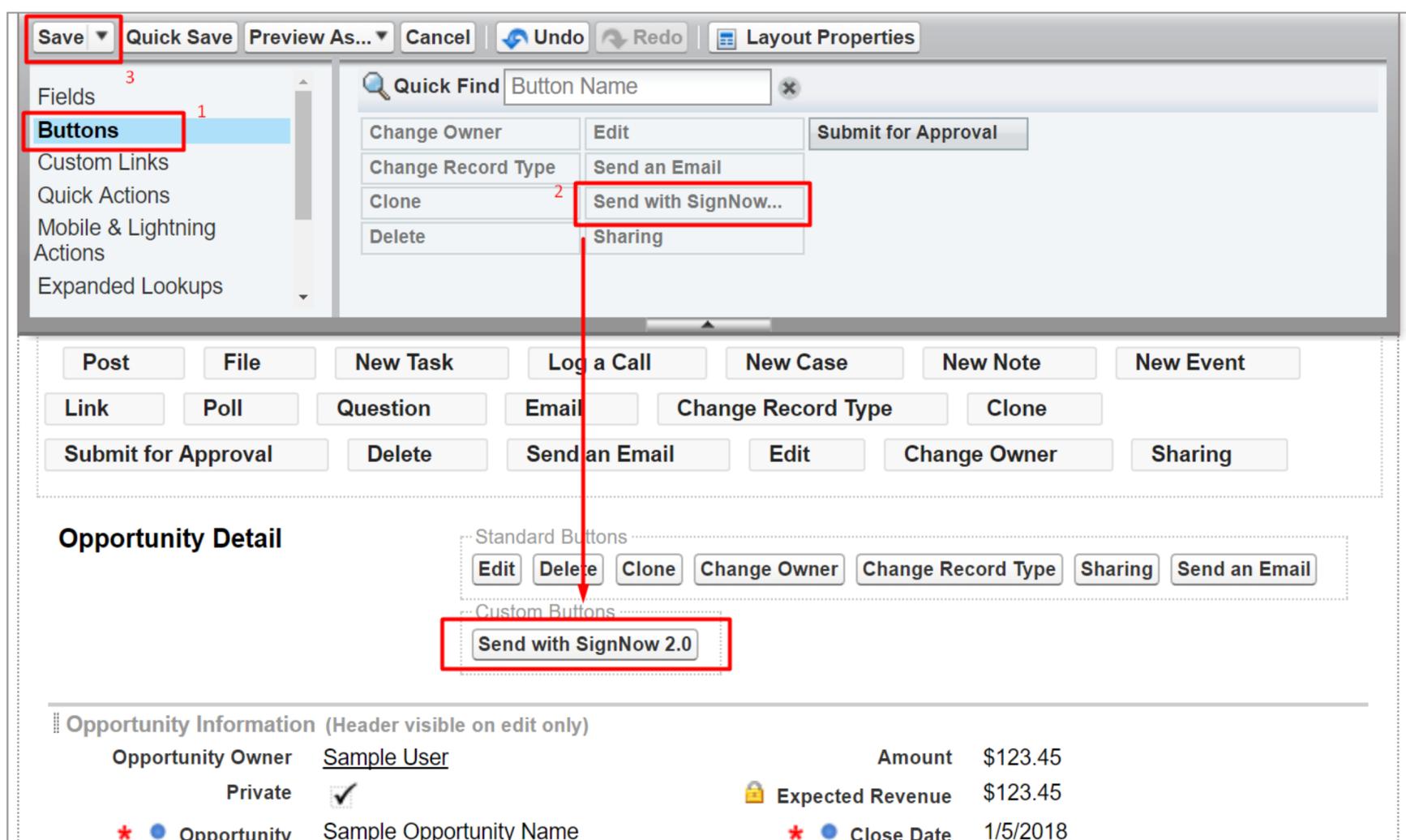
Opportunity Page Layout Help for this Page ?

This page allows you to create different page layouts to display Opportunity data. After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Opportunity Page Layouts New Page Layout Assignment

| Action | Page Layout Name | Created By | Modified By | Feed-Based Layout |
|--|--------------------------------|---------------------------------------|---------------------------------------|--------------------------|
| Edit Del | Opportunity (Marketing) Layout | Somename Lastname, 12/29/2017 5:08 AM | Somename Lastname, 12/29/2017 5:08 AM | <input type="checkbox"/> |
| Edit Del | Opportunity (Sales) Layout | Somename Lastname, 12/29/2017 5:08 AM | Somename Lastname, 12/29/2017 5:08 AM | <input type="checkbox"/> |
| Edit Del | Opportunity (Support) Layout | Somename Lastname, 12/29/2017 5:08 AM | Somename Lastname, 12/29/2017 5:08 AM | <input type="checkbox"/> |
| Edit Del | Opportunity Layout | Somename Lastname, 12/29/2017 5:08 AM | Somename Lastname, 12/29/2017 7:34 AM | <input type="checkbox"/> |

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.



Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields 3

Buttons 1

Custom Links

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Quick Find Button Name

Change Owner Edit Submit for Approval

Change Record Type Send an Email

Clone 2 Send with SignNow...

Delete Sharing

Post File New Task Log a Call New Case New Note New Event

Link Poll Question Email Change Record Type Clone

Submit for Approval Delete Send an Email Edit Change Owner Sharing

Opportunity Detail

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Sharing Send an Email

Custom Buttons

Send with SignNow 2.0

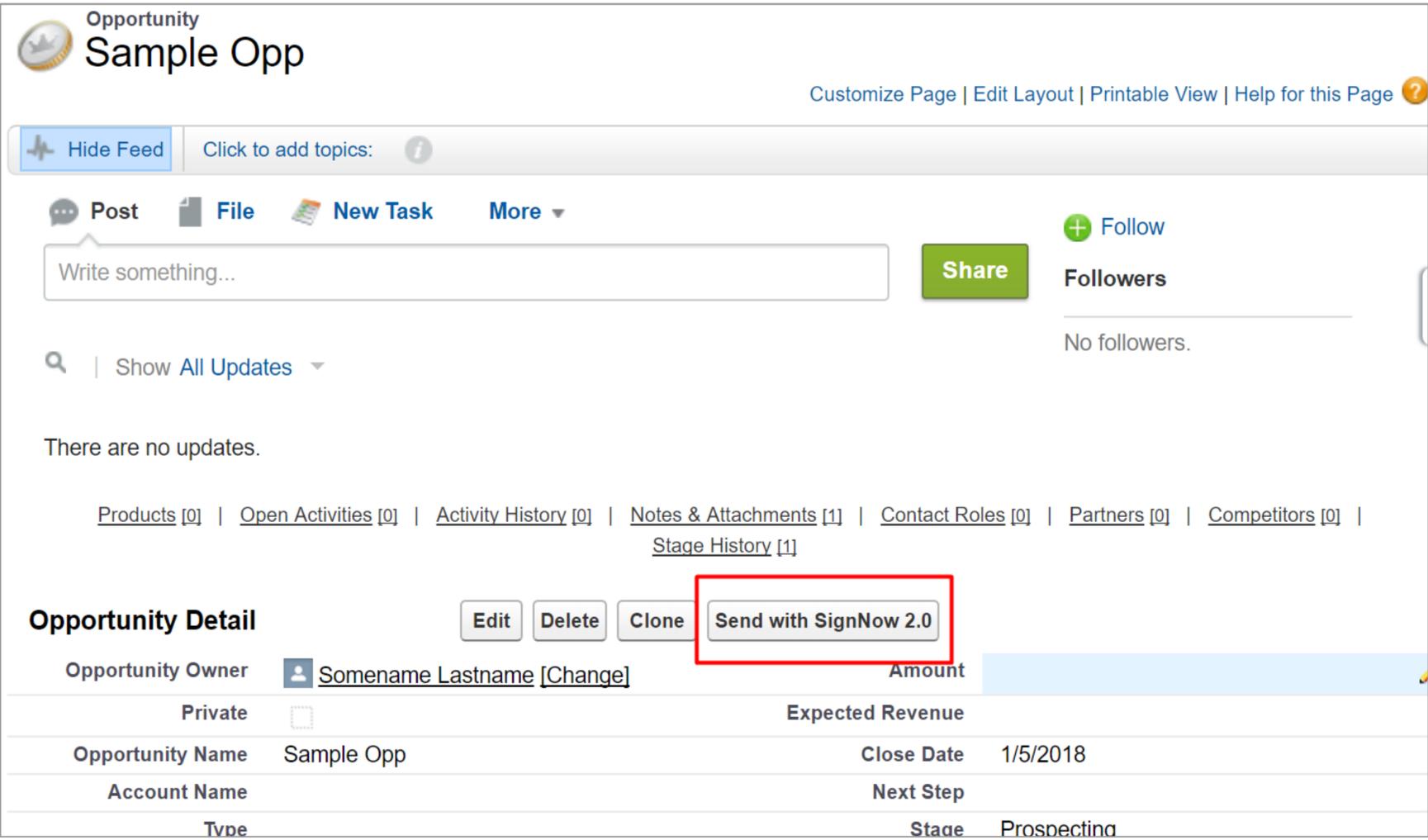
Opportunity Information (Header visible on edit only)

Opportunity Owner Sample User Amount \$123.45

Private Expected Revenue \$123.45

* Opportunity Sample Opportunity Name * Close Date 1/5/2018

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

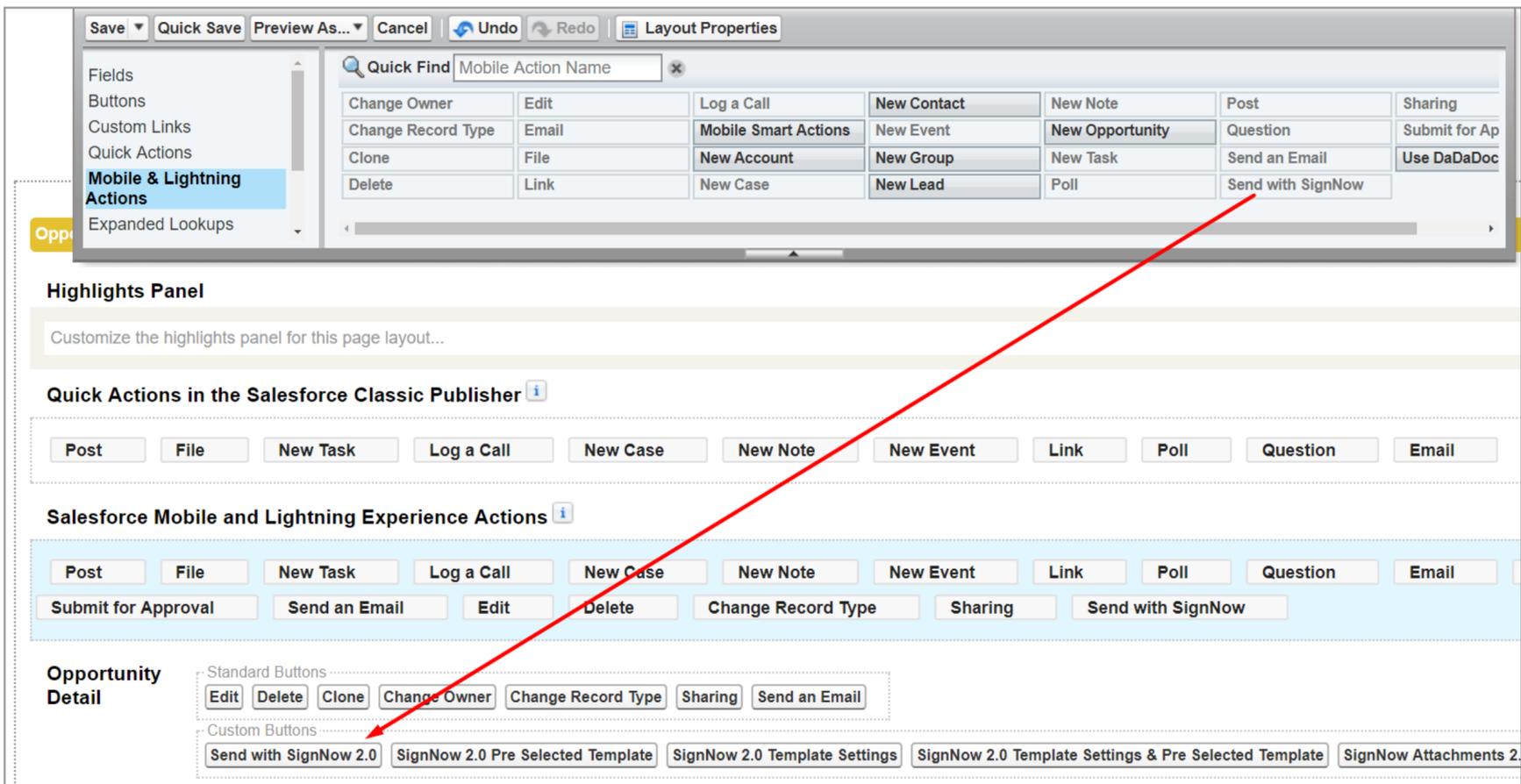


The screenshot displays the Salesforce interface for an Opportunity record titled "Sample Opp". At the top, there are navigation links: "Customize Page | Edit Layout | Printable View | Help for this Page". Below this is a "Hide Feed" button and a "Click to add topics:" section. The main content area includes a "Post" section with a text input field "Write something..." and a "Share" button. To the right, there is a "Follow" button and a "Followers" section indicating "No followers.". Below the post section, there are links for "Products [0]", "Open Activities [0]", "Activity History [0]", "Notes & Attachments [1]", "Contact Roles [0]", "Partners [0]", "Competitors [0]", and "Stage History [1]". The "Opportunity Detail" section contains several buttons: "Edit", "Delete", "Clone", and "Send with SignNow 2.0", which is highlighted with a red box. Below the buttons, there is a table of opportunity details:

| | | | |
|-------------------|----------------------------|------------------|-------------|
| Opportunity Owner | Somename Lastname [Change] | Amount | |
| Private | <input type="checkbox"/> | Expected Revenue | |
| Opportunity Name | Sample Opp | Close Date | 1/5/2018 |
| Account Name | | Next Step | |
| Type | | Stage | Prospecting |

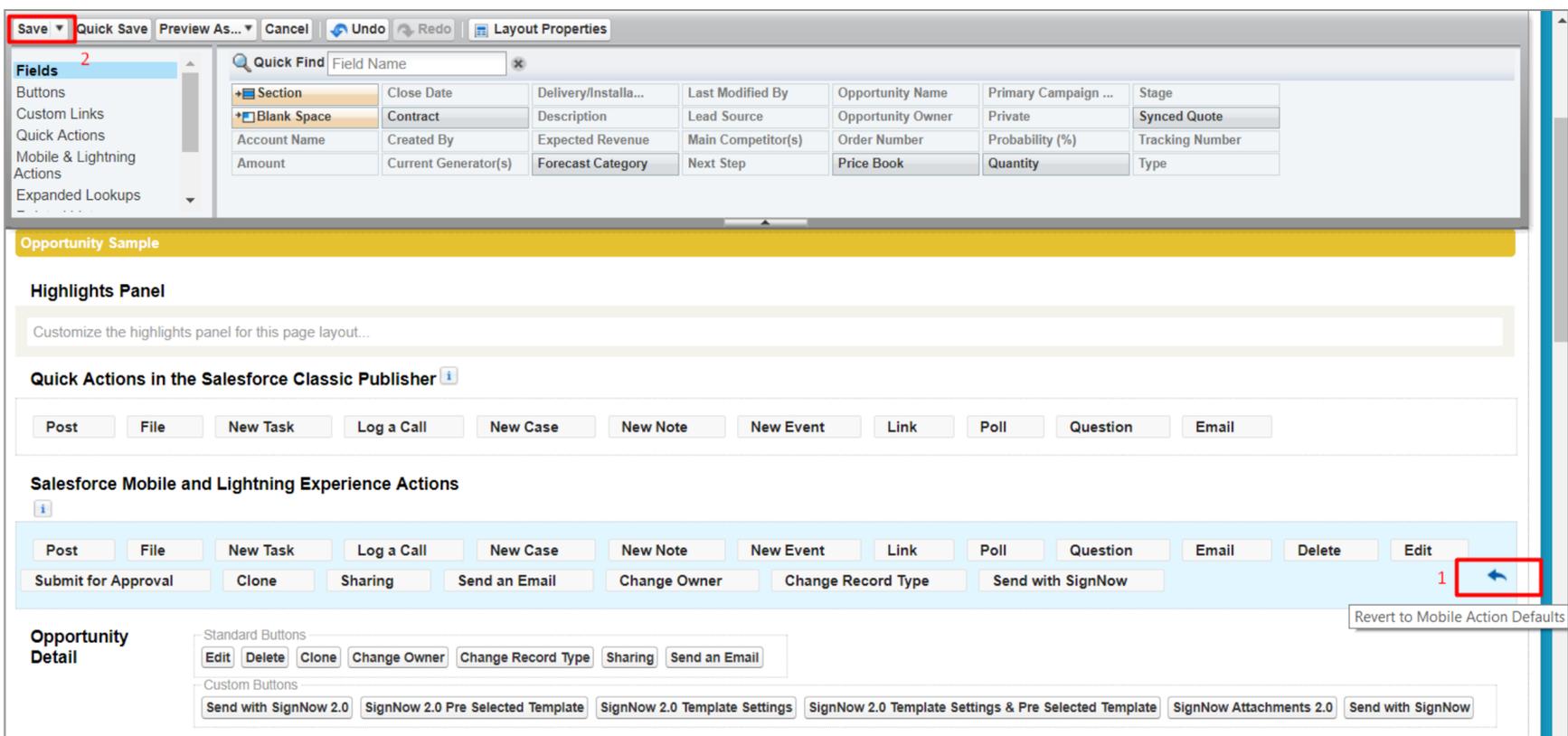
Note: If your SignNow button hasn't appeared in your object page when running Salesforce Lightning, follow the steps below to enable it.

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.

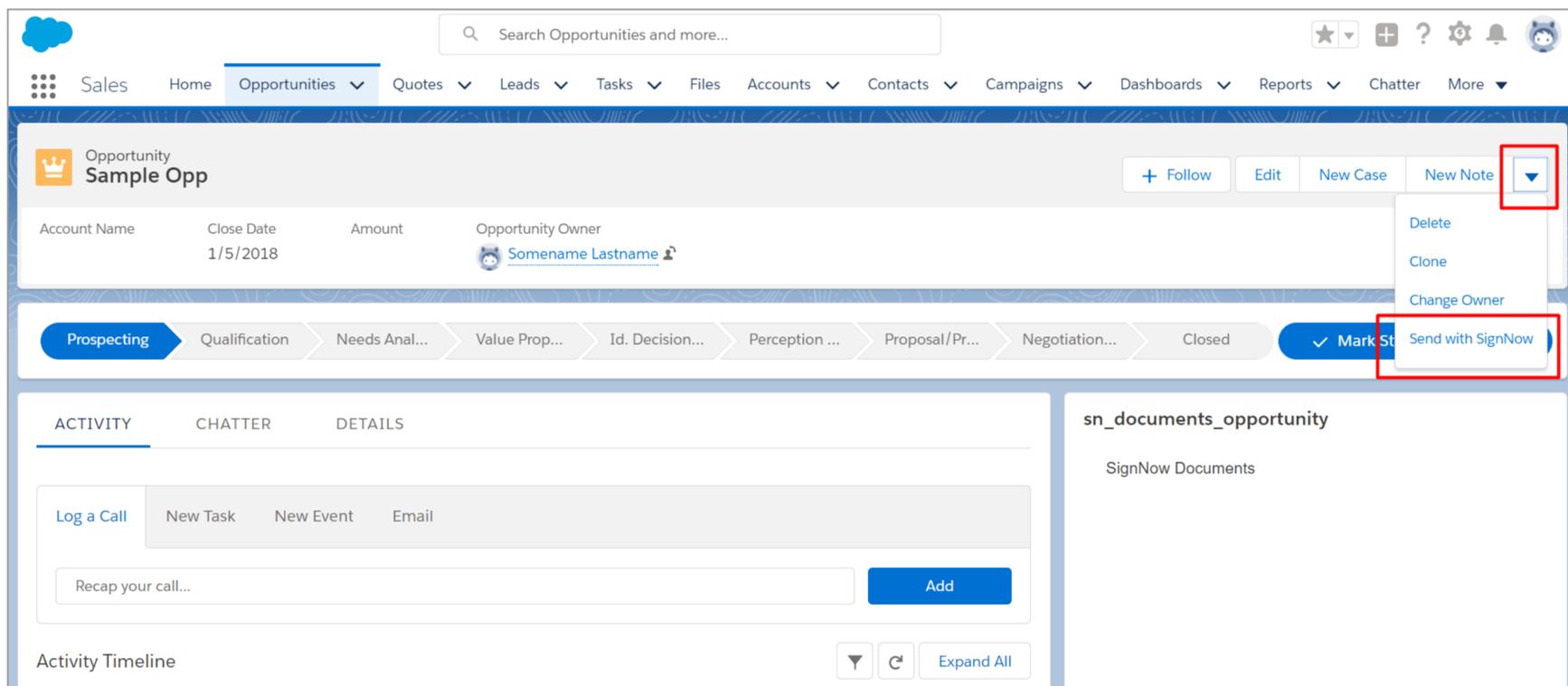


Alternatively, on your object page layout, find the Salesforce Mobile and Lightning Experience Actions section and click *Revert to the Mobile Actions Default*. Click *Save*.

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.

The screenshot shows the Salesforce interface for an Opportunity record titled "Sample Opp". At the top, there are navigation links: "Customize Page | Edit Layout | Printable View | Help for this Page". Below this is a feed area with a "Hide Feed" button and a "Click to add topics" link. The feed contains a "Post" section with a text input field "Write something...", a "Share" button, and a "Follow" button. Below the feed is a search bar and a "Show All Updates" link. The main content area shows "There are no updates." and a list of related items: "Products [0] | Open Activities [0] | Activity History [0] | Notes & Attachments [1] | Contact Roles [0] | Partners [0] | Competitors [0] | Stage History [1]". Below this is the "Opportunity Detail" section with buttons for "Edit", "Delete", "Clone", and "Send with SignNow 2.0". The "Send with SignNow 2.0" button is highlighted with a red box. The detail section includes fields for "Opportunity Owner" (Somename Lastname), "Private" (checkbox), "Opportunity Name" (Sample Opp), "Account Name", "Type", "Amount", "Expected Revenue", "Close Date" (1/5/2018), "Next Step", and "Stage" (Prospecting).

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.

The screenshot shows the SignNow login page. The title is "Login to Your SignNow Account". Below the title is an email input field containing "email@domain.com" and a password input field with masked characters ".....". Below the password field is a blue "Login" button.

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

| Templates | | | |
|---|--|-------------------|--------------------|
| Search SignNow Templates 🔍 | | | |
| 📁 Templates | | | |
| <input type="checkbox"/> |  Invoice 238481 | sfacc14@gmail.com | Select An Option ▼ |
| <input type="checkbox"/> |  Agreement 8418 | sfacc14@gmail.com | Select An Option ▼ |
| <input type="checkbox"/> |  Certificate 884192 | sfacc14@gmail.com | Select An Option ▼ |
| <input type="checkbox"/> |  Invoice_Template | sfacc14@gmail.com | Select An Option ▼ |

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.

| | | | |
|--------------------------|--|-----------------------|--|
| <input type="checkbox"/> |  Invoice_Template | sfacc14+007@gmail.com | <div style="border: 1px solid #ccc; padding: 2px;"> Select An Option ▼ Select An Option Edit Template Salesforce Annotations Salesforce Data Push Back </div> |
| <input type="checkbox"/> |  Invoice 238481 | sfacc14+007@gmail.com | |

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

Reload! After editing and saving the template click the Reload button.

Reload

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

| | | | |
|--------------------------|--|-----------------------|--|
| <input type="checkbox"/> |  Invoice_Template | sfacc14+007@gmail.com | <div style="border: 1px solid #ccc; padding: 2px;"> Select An Option ▼ </div> <div style="border: 1px solid #ccc; padding: 2px;"> Select An Option Edit Template Salesforce Annotations Salesforce Data Push Back </div> |
| <input type="checkbox"/> |  Invoice 238481 | sfacc14+007@gmail.com | |

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.

| | | | |
|--------------------------|--|-----------------------|--|
| <input type="checkbox"/> |  Invoice_Template | sfacc14+007@gmail.com | <div style="border: 1px solid #ccc; padding: 2px;"> Select An Option ▼ </div> <div style="border: 1px solid #ccc; padding: 2px;"> Select An Option Edit Template Salesforce Annotations Salesforce Data Push Back </div> |
| <input type="checkbox"/> |  Invoice 238481 | sfacc14+007@gmail.com | |

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

Generate new Document

Please enter document name:

Invoice 238481

Submit
Cancel

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*.

Send Document For Signing

Invoice_Template
(1) Role 1

email@domain.com

▼ Advance settings

cc

anotheremail@domain.com

another@domain.com

onemore@domain.com

Subject

Your Signature Required

Body

Some person invited you to sign the following document...

Send

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

Advance settings

Password
.....

Expiration Days
30

Reminder
0

Submit

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

Templates

Search SignNow Templates

Templates

| | | | |
|-------------------------------------|--------------|----------------------------------|------------------|
| <input checked="" type="checkbox"/> | i-751instr 1 | huzykevych.iryana@pdffiller.team | Select An Option |
| <input checked="" type="checkbox"/> | i-192 | huzykevych.iryana@pdffiller.team | Select An Option |

Generate Document Group

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

Generate new Document Group

Please enter document group name: Document Group 001

Submit Cancel

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.

Send Document Group For Signing

i-751instr 1
1 Signer 1 sfacc1615+1@gmail.com
[▼ Advance settings](#)

i-192
1 Role 1 sfacc1615+12@gmail.com
[▼ Advance settings](#)

Subject sfacc1615@gmail.com Needs Your Signature

Body sfacc1615@gmail.com invited you to sign document group Document Group 001

[Send Document Group](#)

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

SignNow

[Logout](#) [Show Doc Group Templates](#) [Generate Document Group](#)

Templates

Search SignNow Templates

Templates

| | | | |
|-------------------------------------|-------------------------|-----------------------|--------------------|
| <input checked="" type="checkbox"/> | Invoice_Template_906295 | sfacc14+222@gmail.com | Select An Option ▼ |
| <input checked="" type="checkbox"/> | Certificate 884192 | sfacc14+222@gmail.com | Select An Option ▼ |
| <input type="checkbox"/> | certificate | sfacc14+222@gmail.com | Select An Option ▼ |
| <input type="checkbox"/> | Invoice 238481 | sfacc14+222@gmail.com | Select An Option ▼ |

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.

The screenshot displays the SignNow interface for managing document group templates. At the top, there are 'Logout' and 'Show Templates' buttons. The main heading is 'Document Group Templates'. Below this is a search bar labeled 'Search SignNow Doc Group Templates'. A section titled 'Document Group Templates' contains a list of groups. The first group, 'Certificates 070', is highlighted with a red box around its name and a small upward-pointing arrow. Below this group is a table of templates. The second row of the table, 'Certificate 884192', has a dropdown menu open next to it, also highlighted with a red box. The dropdown menu contains the following options: 'Select An Option', 'Edit Template', 'Salesforce Annotations', and 'Salesforce Data Binding'.

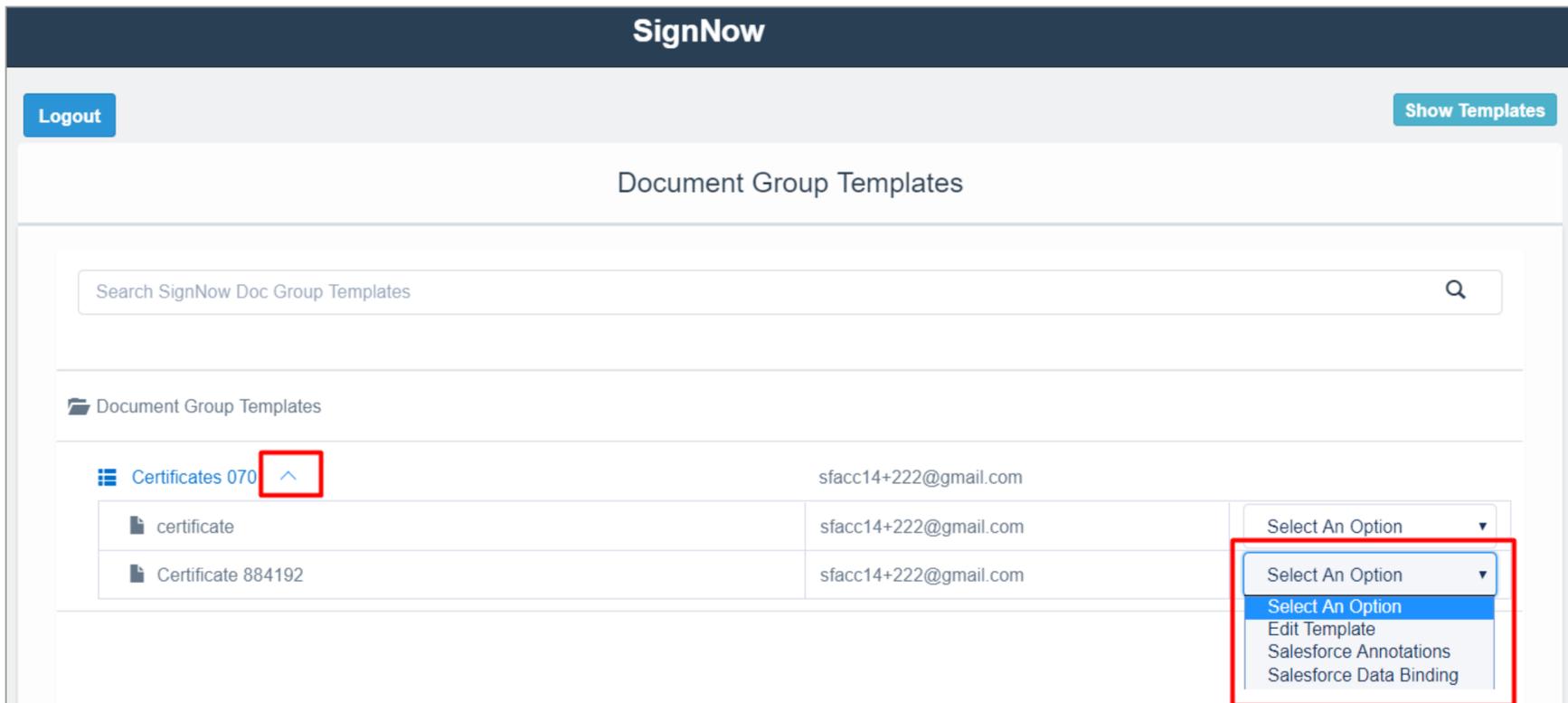
To send a signature request for a Document Group Template, click on it.

This screenshot shows the same 'Document Group Templates' interface. A red box highlights the 'Certificates 070' group name and its dropdown arrow, indicating that it is the selected group for the next step.

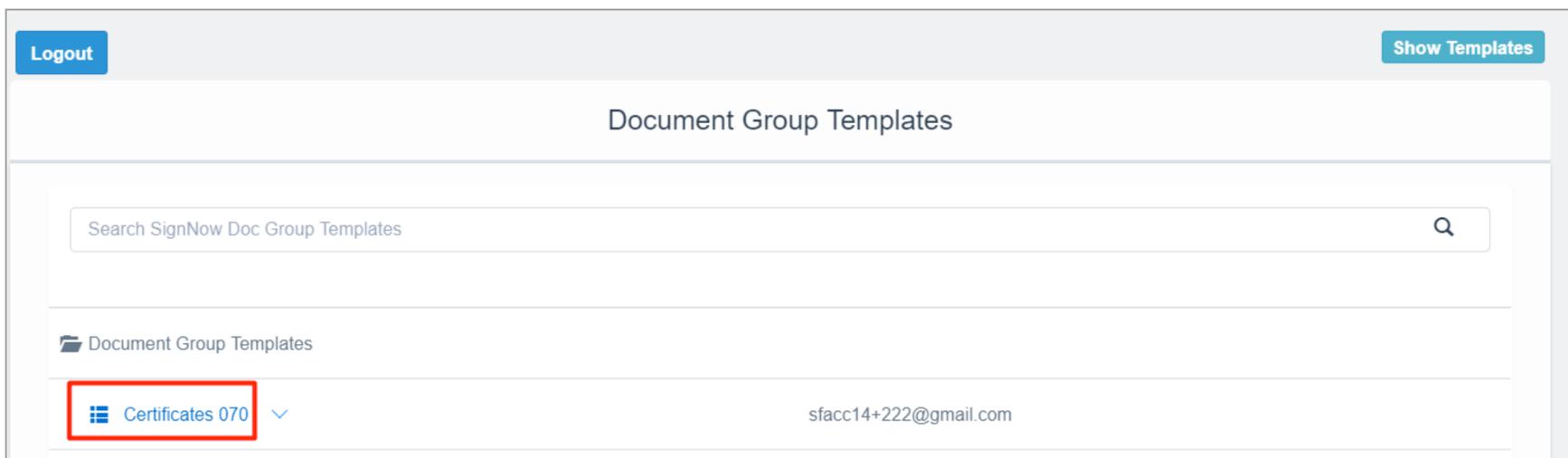
Enter the name for your document group and click *Submit*. Note that you should add proper fillable fields and set roles for all templates in the group first, otherwise the new document group won't be generated.

The screenshot shows a form titled 'Generate new Document Group'. It contains a text input field with the label 'Please enter document group name:' and the value 'Document Group'. Below the input field are two buttons: 'Submit' and 'Cancel'.

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.

The form is titled 'Generate new Document Group'. It has a label 'Please enter document group name:' followed by a text input field containing the text 'Document Group'. At the bottom right of the form are two buttons: 'Submit' and 'Cancel'.

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

Send Document Group For Signing

certificate

1 Signer 1 sfacc14+222@gmail.com

▼ Advance settings

Certificate 884192

1 Signer 1 sfacc14+231@gmail.com

▼ Advance settings

Subject sfacc14+222@gmail.com Needs Your Signature

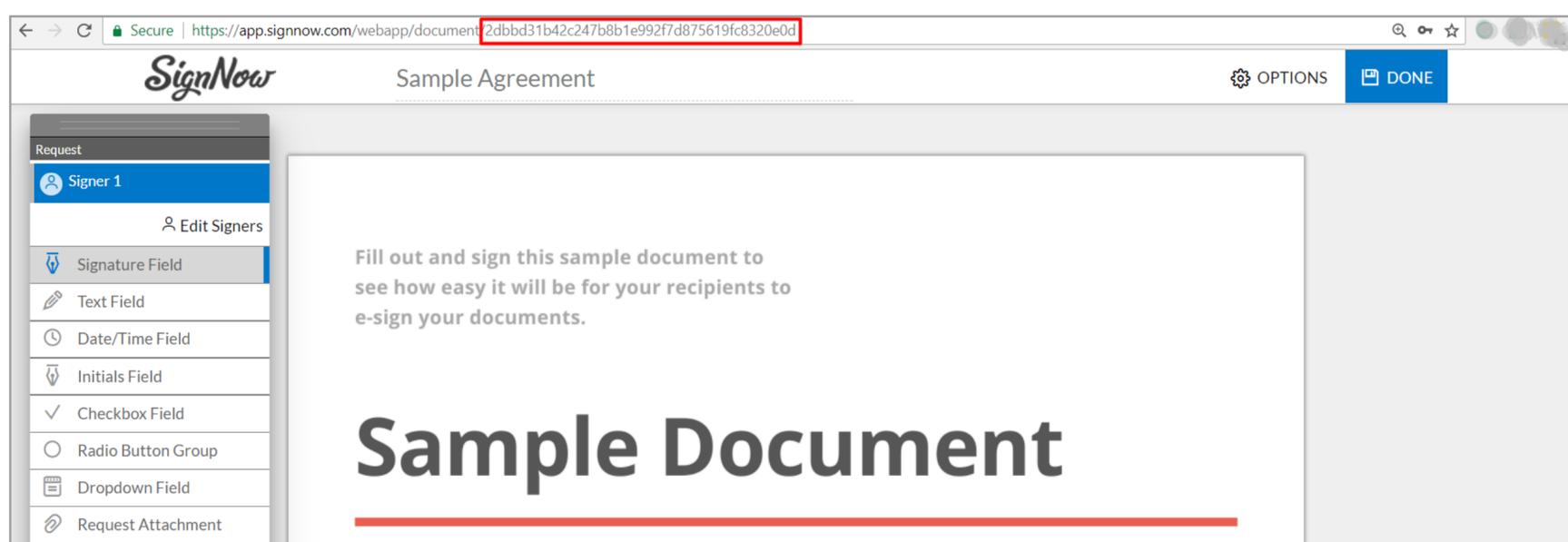
Body sfacc14+222@gmail.com invited you to sign document group Document Group 009

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.

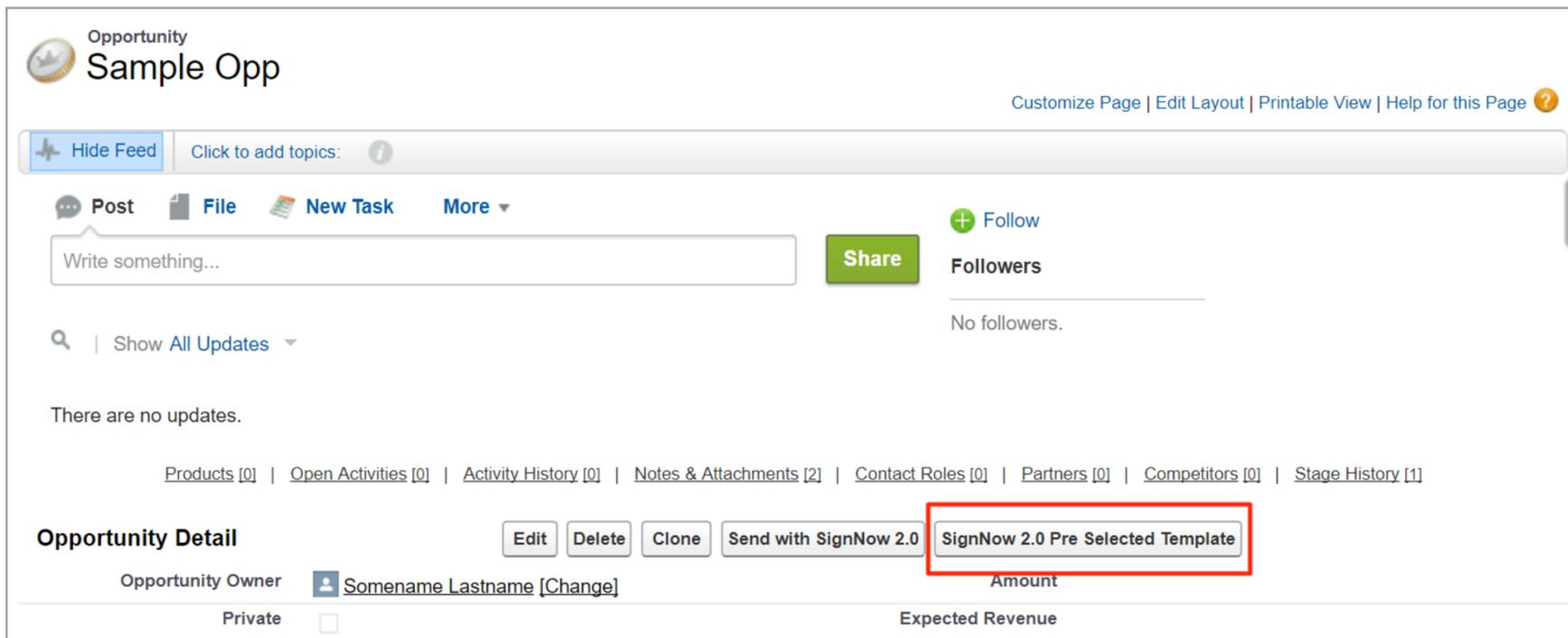


```
https://cuda-signnow.na78.visual.force.com/apex/signnow_templates?id={!Opportunity.Id}
&type=opportunity&template_id=sn template id
```

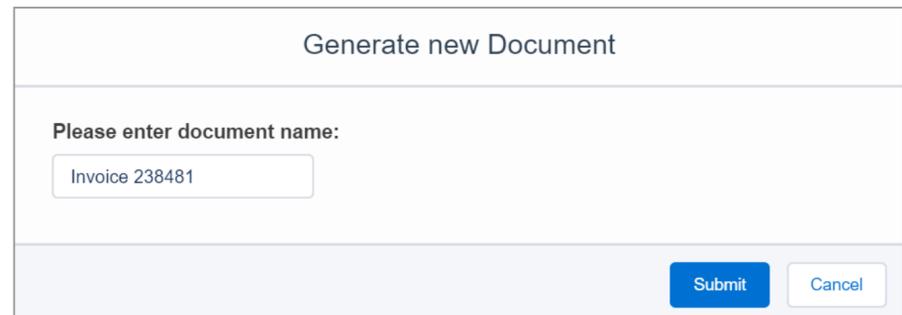
Usage:

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

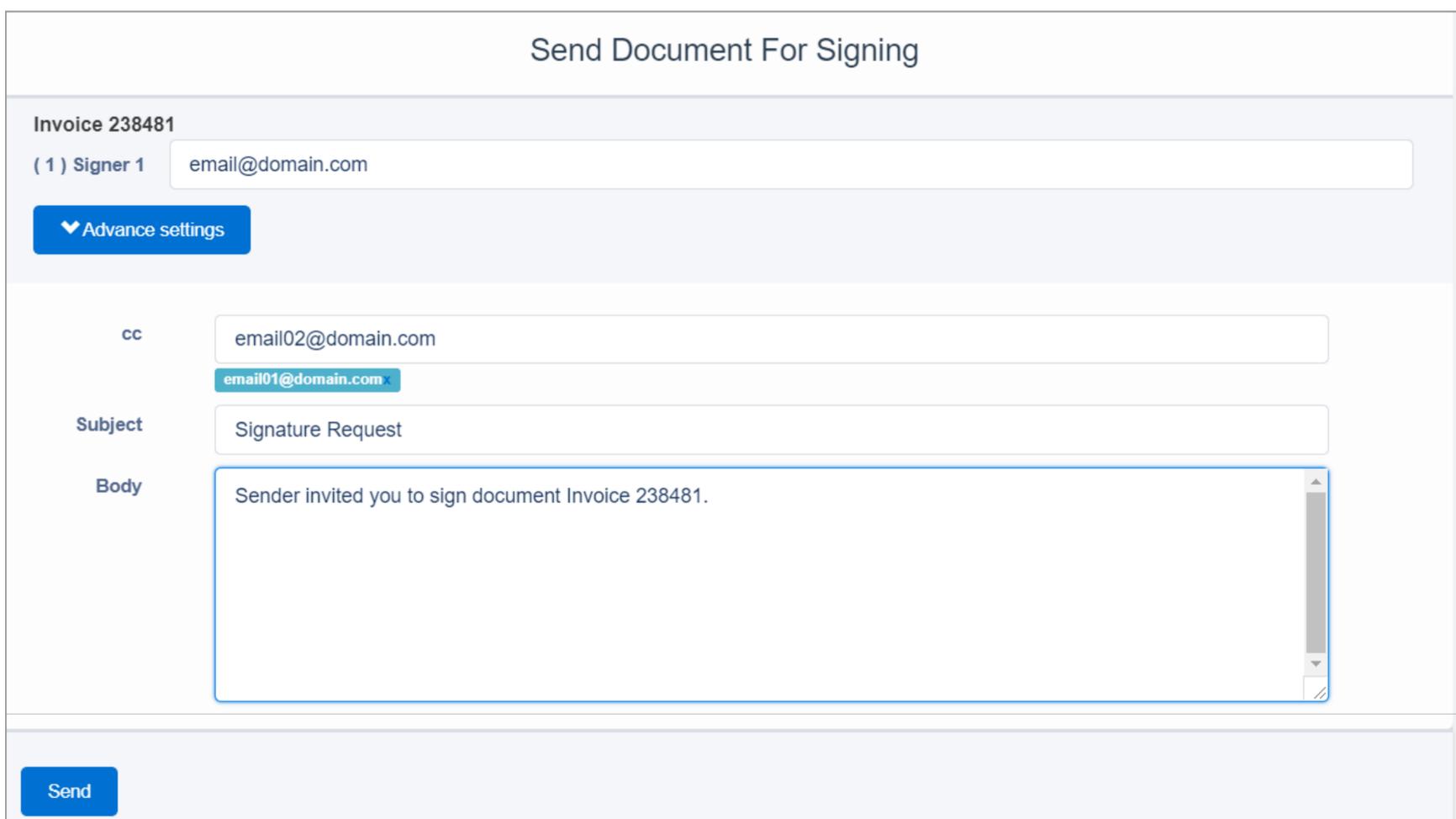
1. In your object click the *SignNow Pre Selected Template* button.



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.

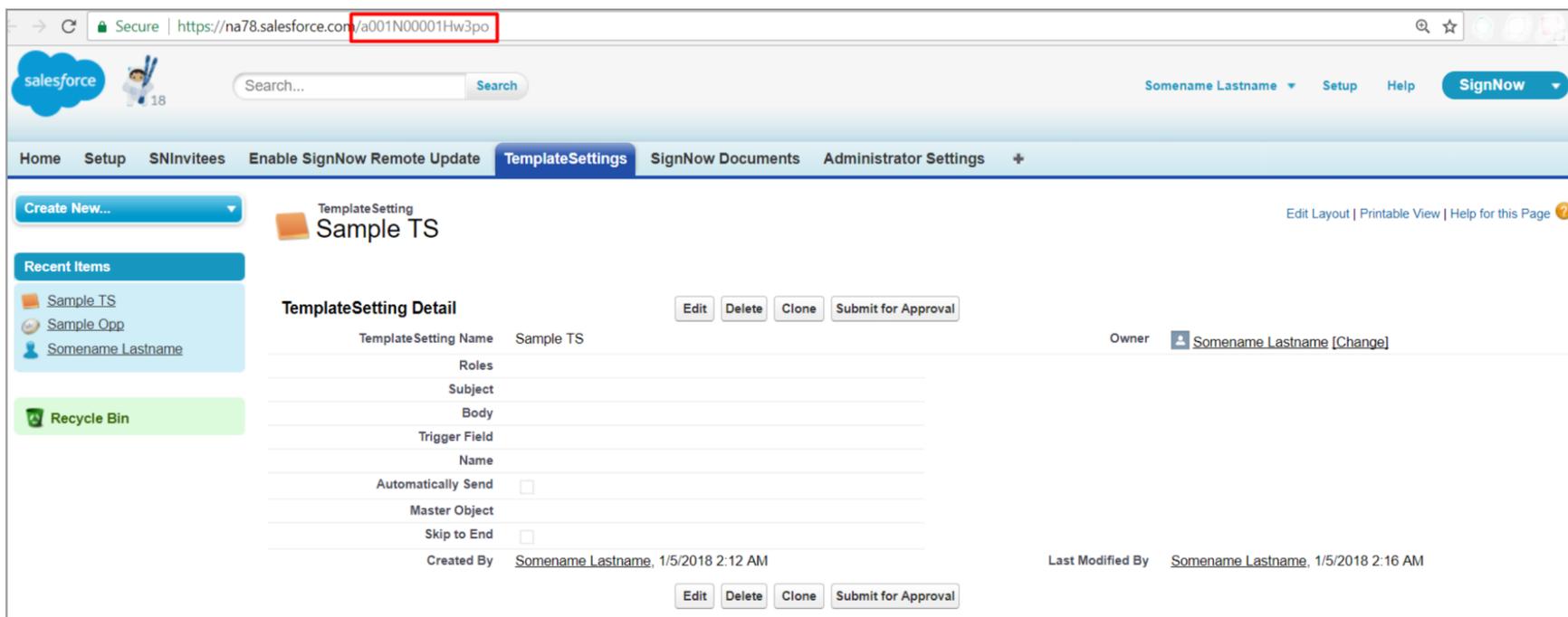


3. Enter recipient details and click Send to send the document out for signing. Use Advanced Settings to password protect your document as well as set an expiration date and reminder.



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.

Opportunity
Sample Opp

Customize Page | Edit Layout | Printable View | Help for this Page

Hide Feed | Click to add topics: ⓘ

Post | File | New Task | More ▾

Write something... Share + Follow

Followers
No followers.

Show All Updates ▾

There are no updates.

[Products \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[2\]](#) | [Contact Roles \[0\]](#) | [Partners \[0\]](#) | [Competitors \[0\]](#) | [Stage History \[1\]](#)

Opportunity Detail

Edit Delete Clone Send with SignNow 2.0 SignNow 2.0 Pre Selected Template
SignNow 2.0 Template Settings

| | | |
|-------------------|--|---------------------|
| Opportunity Owner | Somename Lastname [Change] | Amount |
| Private | <input type="checkbox"/> | Expected Revenue |
| Opportunity Name | Sample Opp | Close Date 1/5/2018 |

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*.

Generate new Document

Please enter document name:

Submit Cancel

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.

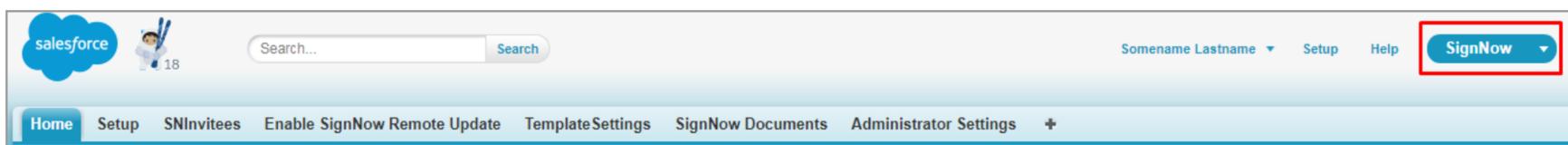
The screenshot shows a form titled "Custom TS Name" with the following fields and options:

- Custom TS Name:** (1) Signer 1
- Email:** sfacc14+001@gmail.com
- Advance settings:** A blue button with a downward arrow.
- cc:** ###@## ##@## ##@##
- Subject:** Custom TS Subject
- Body:** Custom TS Body.
- Send:** A blue button at the bottom left.

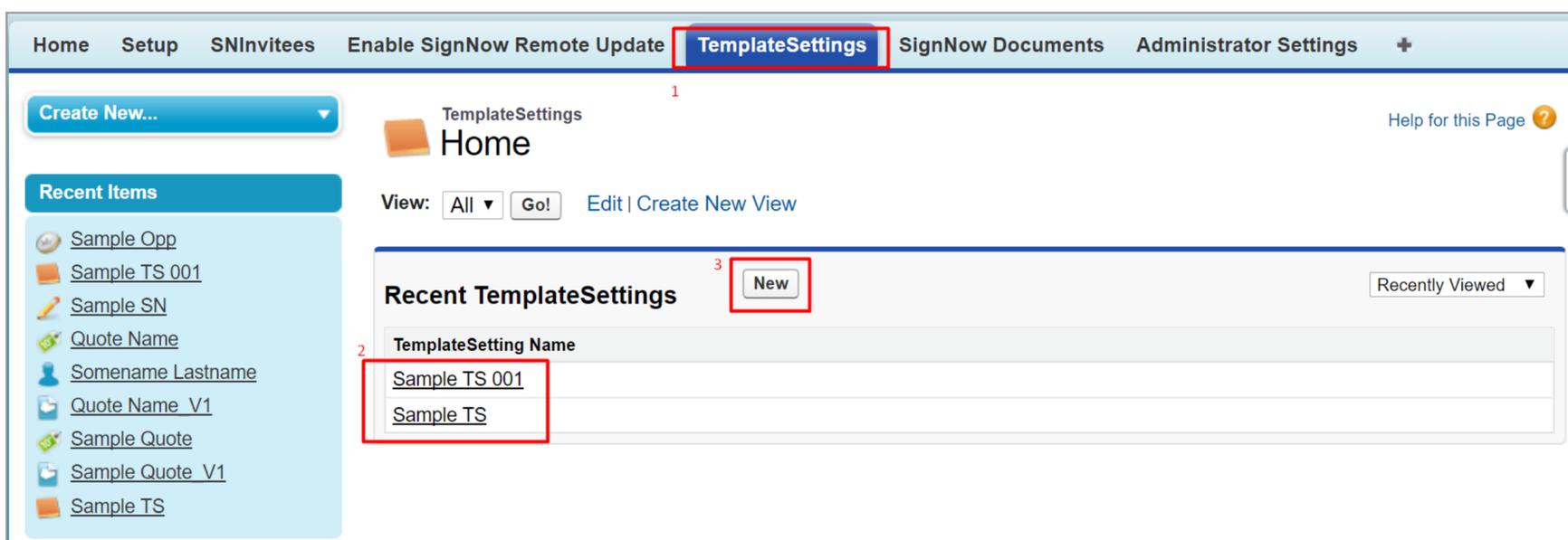
How to Set TemplateSettings

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.

The screenshot shows the 'TemplateSetting Edit' form in Salesforce. The form is titled 'TemplateSetting Edit' and has three buttons at the top: 'Save', 'Save & New', and 'Cancel'. Below the title bar is the 'Information' section, which includes a legend for required information (a red vertical bar followed by '= Required Information'). The form fields are as follows:

- TemplateSetting Name:** Invoice Sendout (with a dropdown arrow icon)
- Owner:** Somename Lastname
- Roles:** A text area containing a JSON array:

```
[{"order": "1", "name": "Signer 1", "email": "somename1@somedomain.com", "allow_forwarding": "yes"}, {"order": "2", "name": "Signer 2", "email": "somename2@somedomain.com", "allow_forwarding": "yes"}]
```
- Subject:** Signature Request
- Body:** Please sign the invoice attached.
- Trigger Field:** (empty text input)
- Name:** (empty text input)
- Automatically Send:**
- Master Object:** (empty text input)
- Skip to End:**

At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

SignNow Attachments

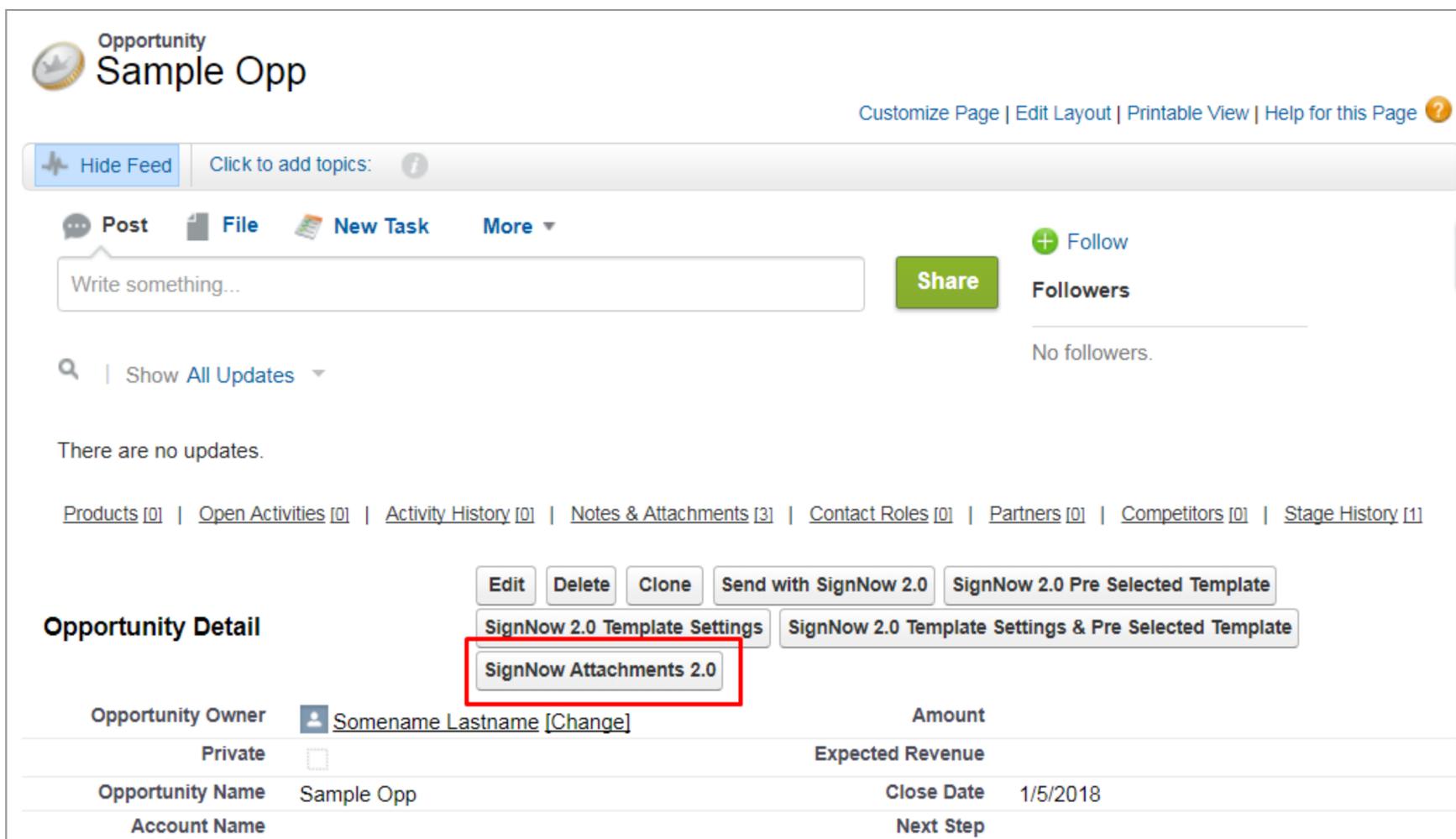
Button Code:

```
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.

| Attachments | |
|---------------------------------------|--|
| Search the Attachments of this Record | |
| SN Agreement 818479 (sent).pdf | Created On: 2018-01-09T10:15:19.000+0000 |
| Invoice_Template (sent).pdf | Created On: 2018-01-05T13:43:52.000+0000 |
| Invoice_Template_for_All (sent).pdf | Created On: 2018-01-05T12:32:52.000+0000 |

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.

Document Options

1) SETUP DOCUMENT 2) DATA BINDING

Please enter document name:

[Edit Document](#)

[Add Annotations](#)

[Next](#) [Skip Document Options](#)

4. In the *Salesforce Data Binding* section you can pre-fill the template with data from 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*.

Document Options

1) SETUP DOCUMENT 2) DATA BINDING

Type:
Enter Salesforce Record Type:

Fields:
SignNow field type: text SignNow Role: Signer 1
Enter Salesforce Record Field:

Update Salesforce record field Append from Salesforce record field

[Previous](#) [Finish](#)

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.

Send Document For Signing

SN Agreement 818479 sent
(1) Signer 1 sfacc14+001@gmail.com

[Advance settings](#)

cc:

Subject:

Body:

[Send](#)

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.

The screenshot shows the 'Quote Settings' page in Salesforce. At the top left, a search bar contains the word 'quote' (1). Below it, the left sidebar is expanded to show 'Quotes Settings' (2). The main content area has a heading 'Quote Settings' and a sub-heading 'Enable or disable quotes for your organization. This feature allows users to create a quote and email a PDF of the quote to customers.' Below this, there is a checkbox labeled 'Enable Quotes' which is checked (3). At the bottom right of the main content area, there is a 'Save' button (4) and a 'Cancel' button.

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

The screenshot shows the 'Page Layout Selection' page in Salesforce. The heading is 'Page Layout Selection' and the sub-heading is 'Select the page layouts that should include the Quotes related list. The related list will be added as the last related list on these page layouts. The related list will not appear on any pages if you do not select a layout. To change the location of this related list on the page, you will need to customize the page layout.' Below this, there is a table with two columns: 'Add List' and 'Page Layout Name'. The table has four rows: 'Opportunity (Marketing) Layout', 'Opportunity (Sales) Layout', 'Opportunity (Support) Layout', and 'Opportunity Layout'. The 'Opportunity Layout' row has a checked checkbox (1). Below the table, there is a checkbox labeled 'Append to users' personal related list customization' which is unchecked. At the bottom right, there is a 'Save' button (2) and a 'Cancel' button.

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*.

Quote
Quote Name

Customize Page | Edit Layout | Printable View | Help for this Page ?

« Back to Sample Opp

[Quote Line Items \[0\]](#) | [Quote PDFs \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

Quote Detail [Edit](#) [Delete](#) **Create PDF** [Email Quote](#) [Start Sync](#) [SignNow Quotes 2.0](#)

| | | | |
|------------------|------------|-----------------|--------------------------|
| Quote Number | 00000002 | Expiration Date | |
| Quote Name | Quote Name | Syncing | <input type="checkbox"/> |
| Opportunity Name | Sample Opp | Status | Draft |
| Account Name | | Description | |

▼ **Totals**

| | | | |
|-------------|--------|-----------------------|--------|
| Subtotal | \$0.00 | Tax | \$5.00 |
| Discount | 0.00% | Shipping and Handling | \$3.00 |
| Total Price | \$0.00 | Grand Total | \$8.00 |

▼ **Prepared For**

| | |
|--------------|-------|
| Contact Name | Phone |
| Email | Fax |

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

CN

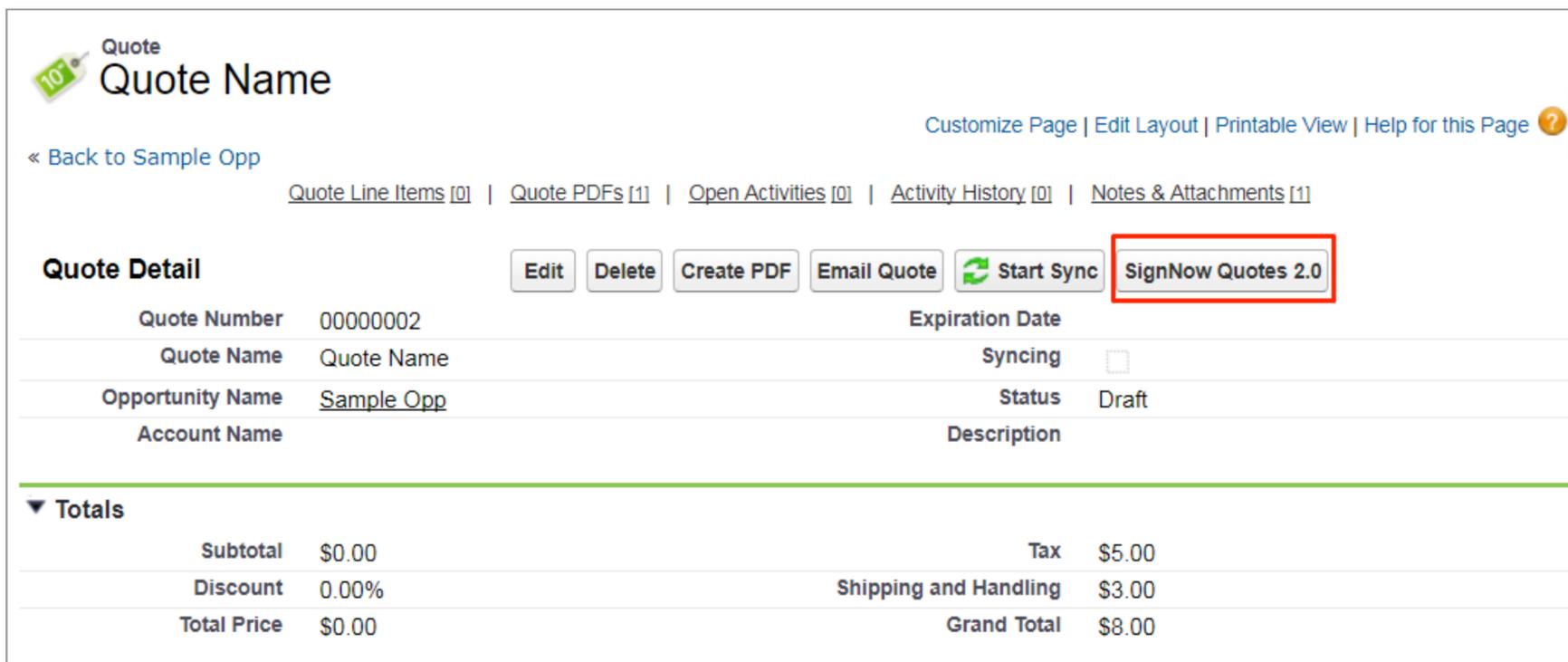
Company Address US Created Date 1/10/2018
Quote Number 00000002

Prepared By Somename Lastname
Email sfacc14+002@gmail.com

Subtotal \$0.00
Discount 0.00%
Total Price \$0.00
Tax \$5.00
Shipping and \$3.00

[Save to Quote](#) [Save and Email Quote](#) [Cancel](#)

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



Quote
10 Quote Name

Customize Page | Edit Layout | Printable View | Help for this Page ?

« Back to Sample Opp

Quote Line Items [0] | Quote PDFs [1] | Open Activities [0] | Activity History [0] | Notes & Attachments [1]

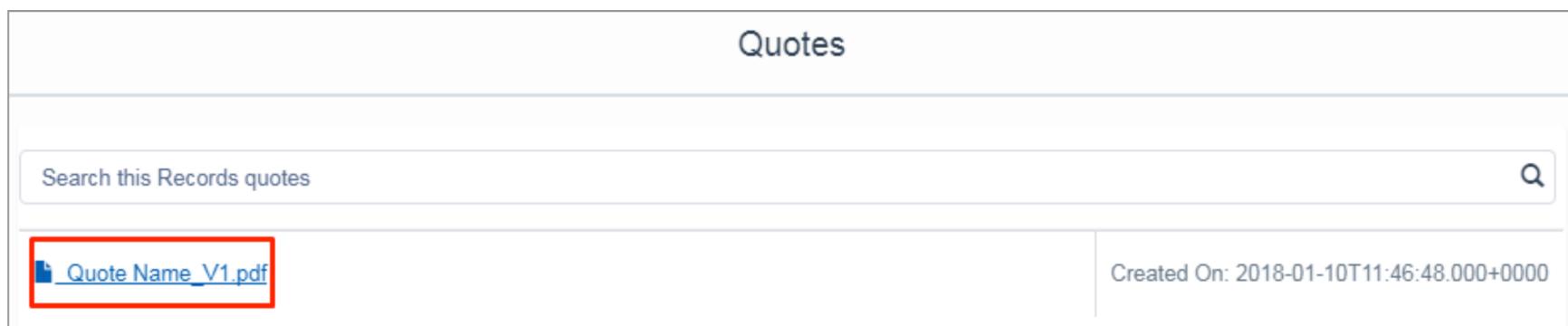
Quote Detail Edit Delete Create PDF Email Quote Start Sync SignNow Quotes 2.0

| | | | |
|------------------|------------|-----------------|--------------------------|
| Quote Number | 00000002 | Expiration Date | |
| Quote Name | Quote Name | Syncing | <input type="checkbox"/> |
| Opportunity Name | Sample Opp | Status | Draft |
| Account Name | | Description | |

▼ Totals

| | | | |
|-------------|--------|-----------------------|--------|
| Subtotal | \$0.00 | Tax | \$5.00 |
| Discount | 0.00% | Shipping and Handling | \$3.00 |
| Total Price | \$0.00 | Grand Total | \$8.00 |

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.



Quotes

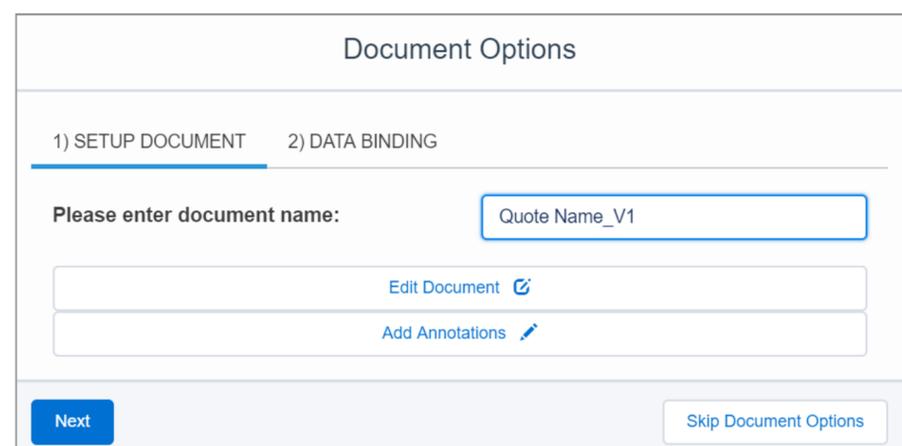
Search this Records quotes

 [Quote Name_V1.pdf](#) Created On: 2018-01-10T11:46:48.000+0000

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.



Document Options

1) SETUP DOCUMENT 2) DATA BINDING

Please enter document name:

[Edit Document](#) 

[Add Annotations](#) 

[Next](#) [Skip Document Options](#)

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.

Send Document For Signing

Quote Name_V1

(1) Signer 1

[▼ Advance settings](#)

cc

Subject

Body

[Send](#)

SignNow Bulk Invite

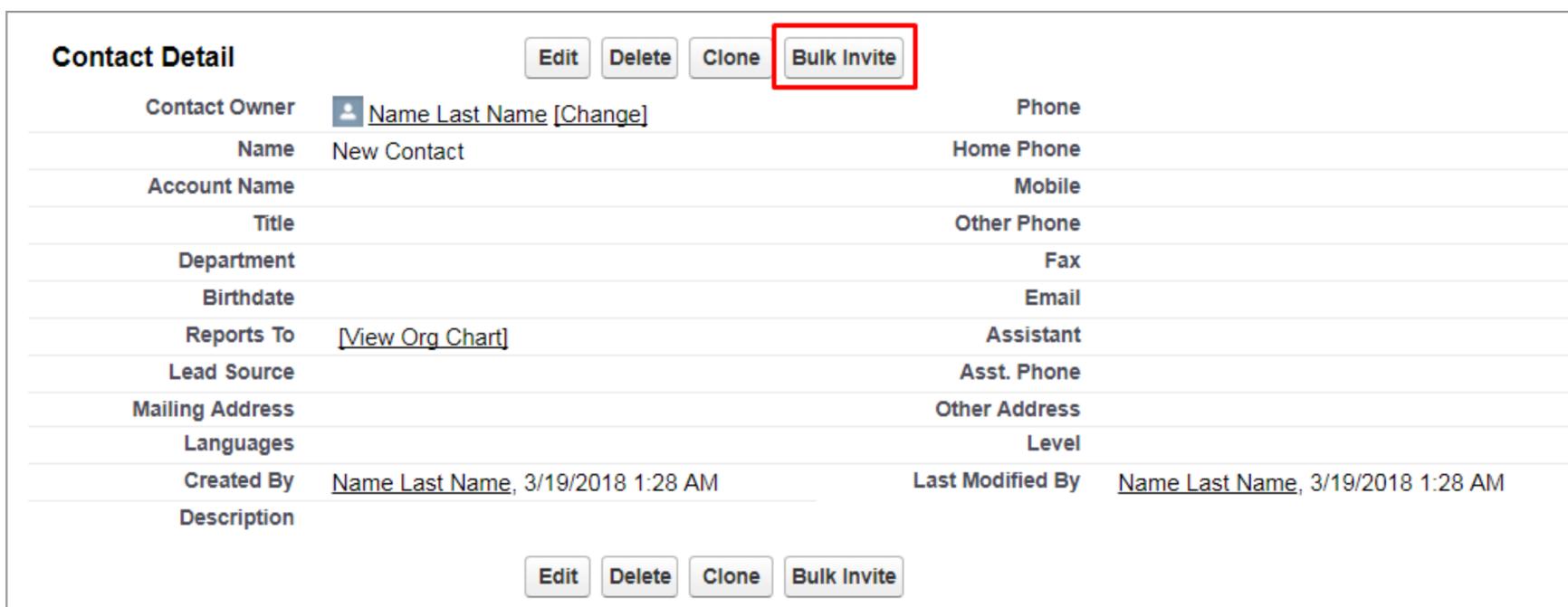
Button Code:

```
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.



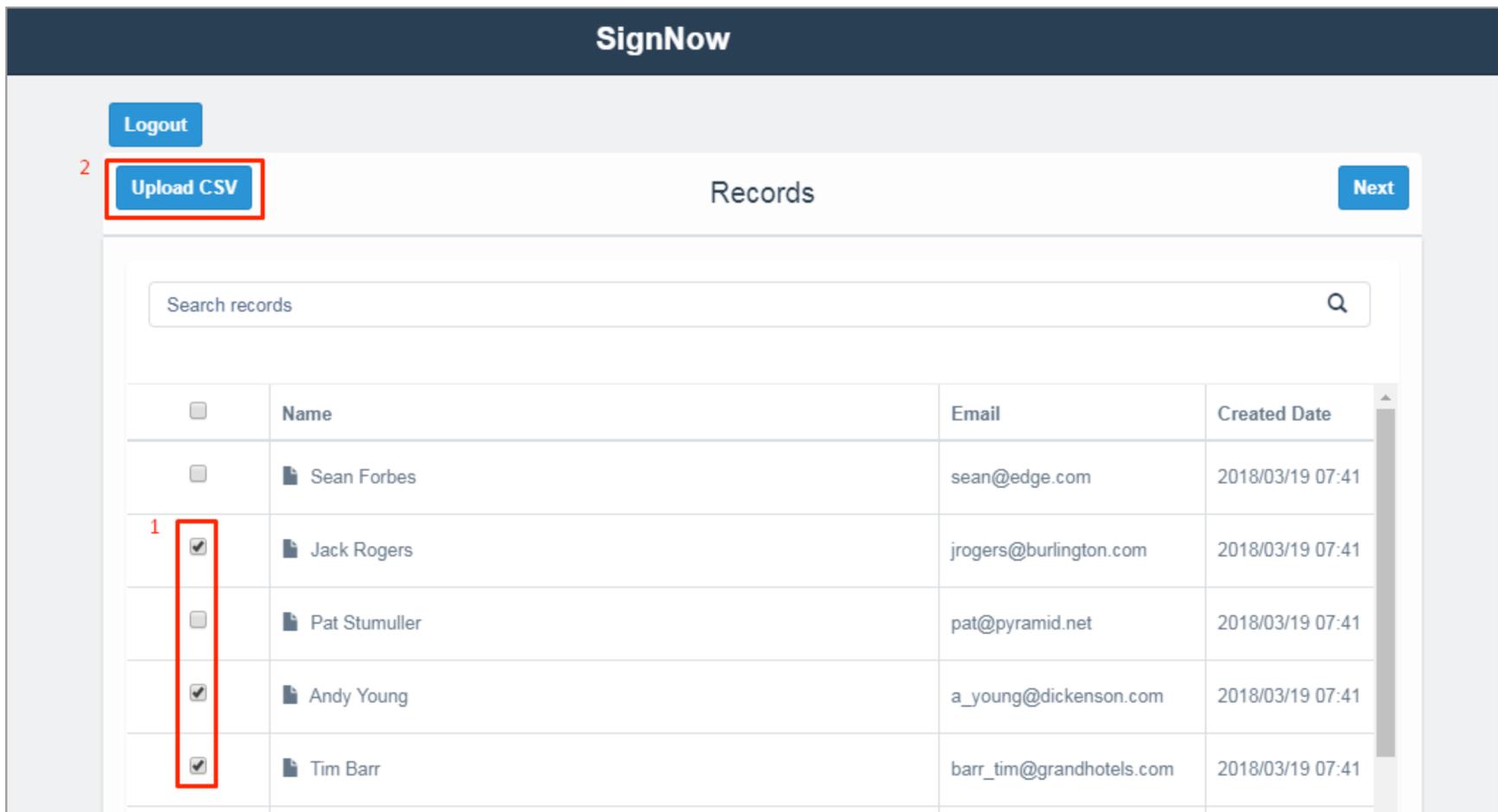
The screenshot shows a Salesforce 'Contact Detail' record for a contact named 'New Contact'. At the top right of the record, there are four buttons: 'Edit', 'Delete', 'Clone', and 'Bulk Invite'. The 'Bulk Invite' button is highlighted with a red rectangular box. Below the buttons, the record details are displayed in a table format. The 'Bulk Invite' button is located at the top right of the record, above the 'Phone' field.

| Contact Detail | | Edit | Delete | Clone | Bulk Invite |
|-----------------|---|------|--------|-------|-------------|
| Contact Owner |  Name Last Name [Change] | | | | |
| Name | New Contact | | | | |
| Account Name | | | | | |
| Title | | | | | |
| Department | | | | | |
| Birthdate | | | | | |
| Reports To | [View Org Chart] | | | | |
| Lead Source | | | | | |
| Mailing Address | | | | | |
| Languages | | | | | |
| Created By | Name Last Name, 3/19/2018 1:28 AM | | | | |
| Description | | | | | |
| | | | | | |

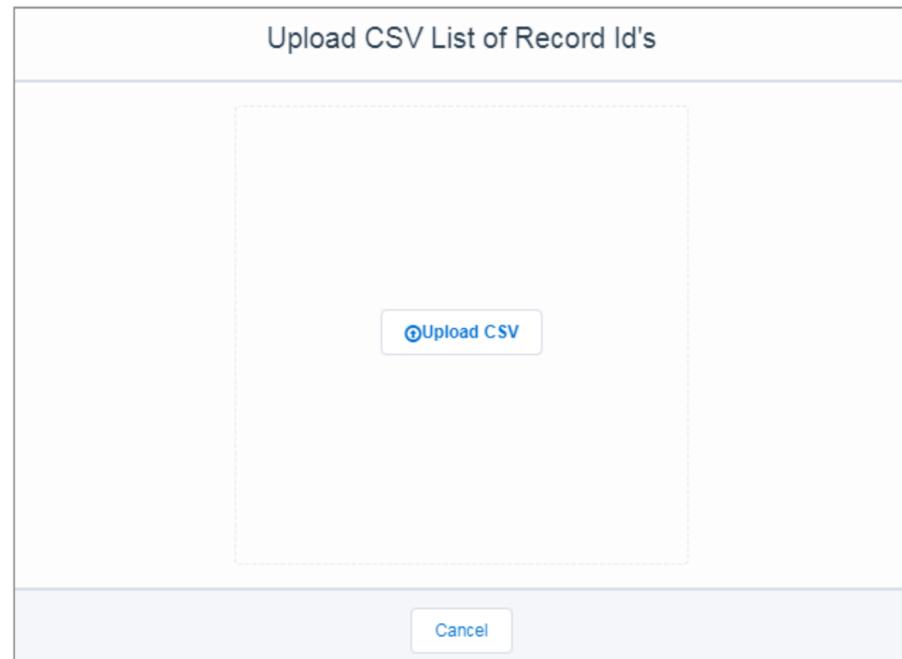
Select required contacts from the Records list by checking the boxes next to their names and clicking *Next*.

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

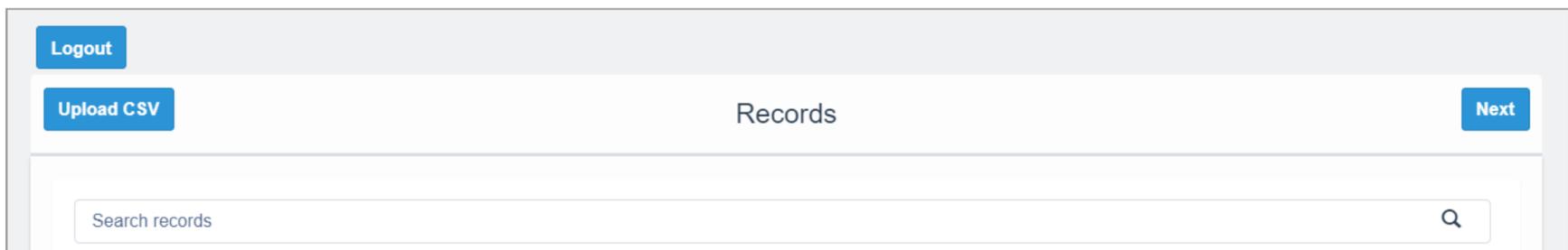
Note: If you would like to send a Bulk Invite using a CSV file, make sure to prepare one using a comma-separated list for all required record IDs inside.



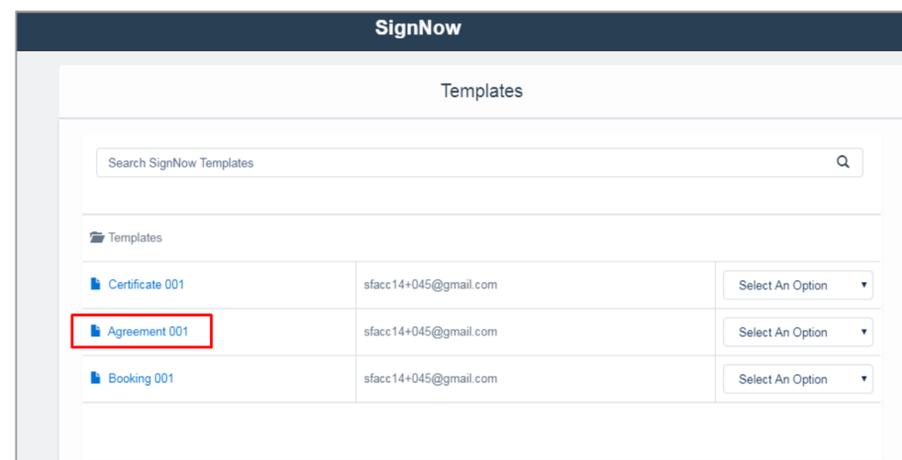
- Click *Upload CSV* in the Upload CSV List of Record ID's pop-up.



- 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*.

Generate new Document

Please enter document name:

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.

Certificate 001
(1) Signer 1

1

cc 2

Subject

Body

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

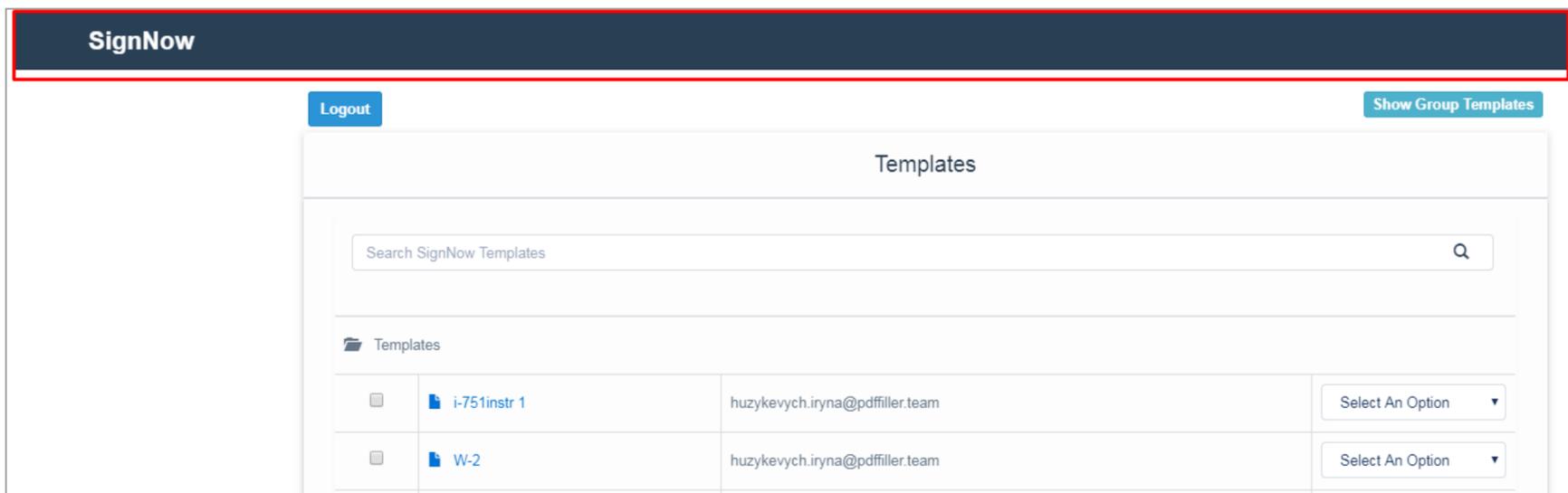
If you have preset emails for templates in your SignNow application, they will be automatically added each time you create a signature request without the ability to change them.

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.

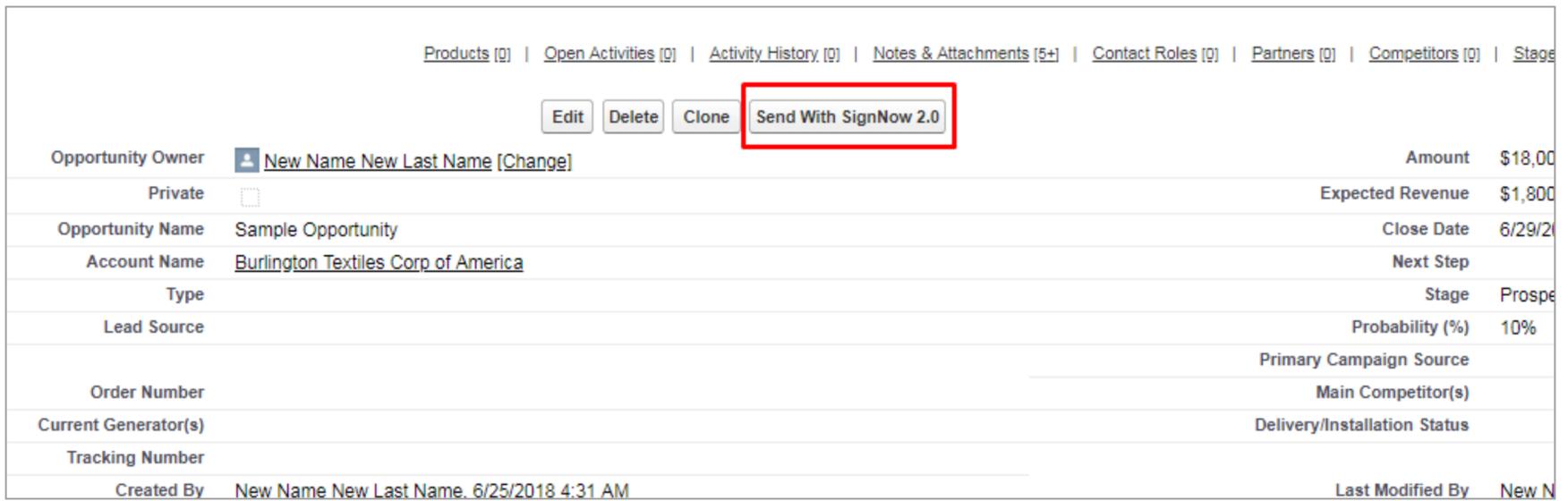
The code will look as follows:

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

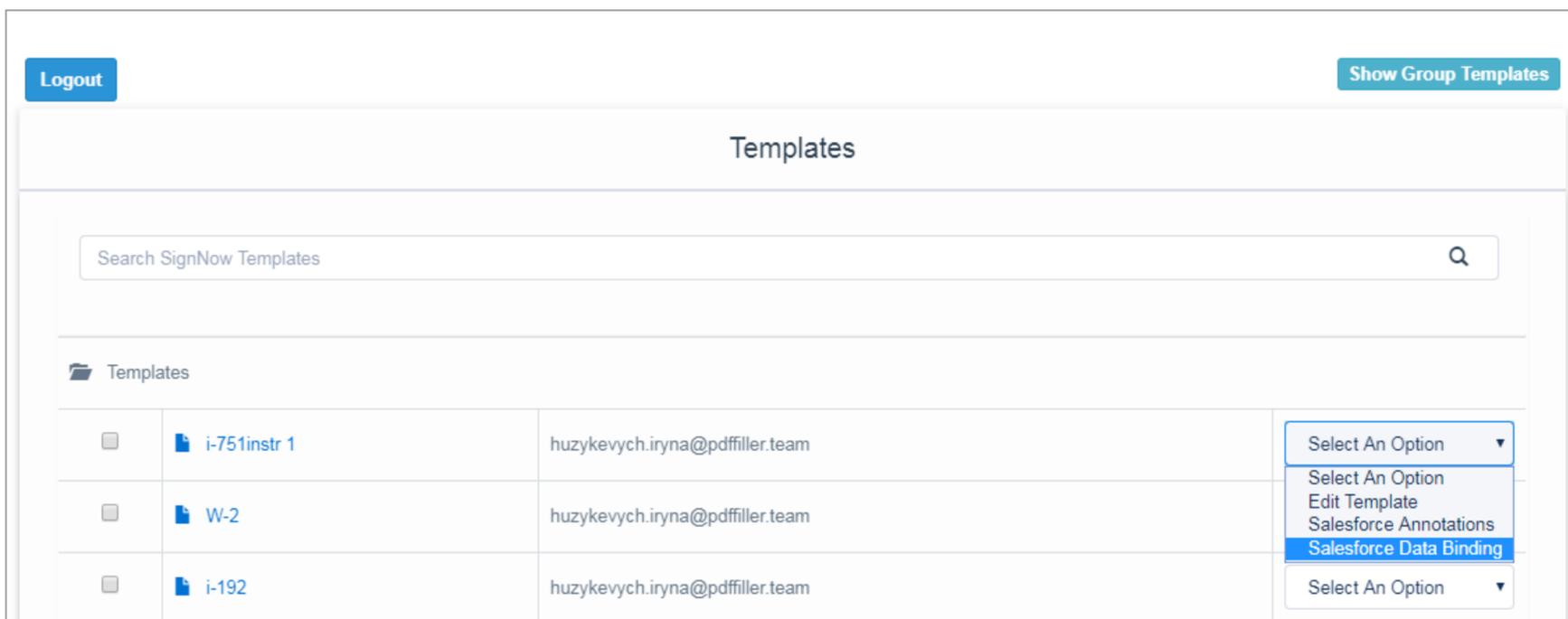
Salesforce Data Binding

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.

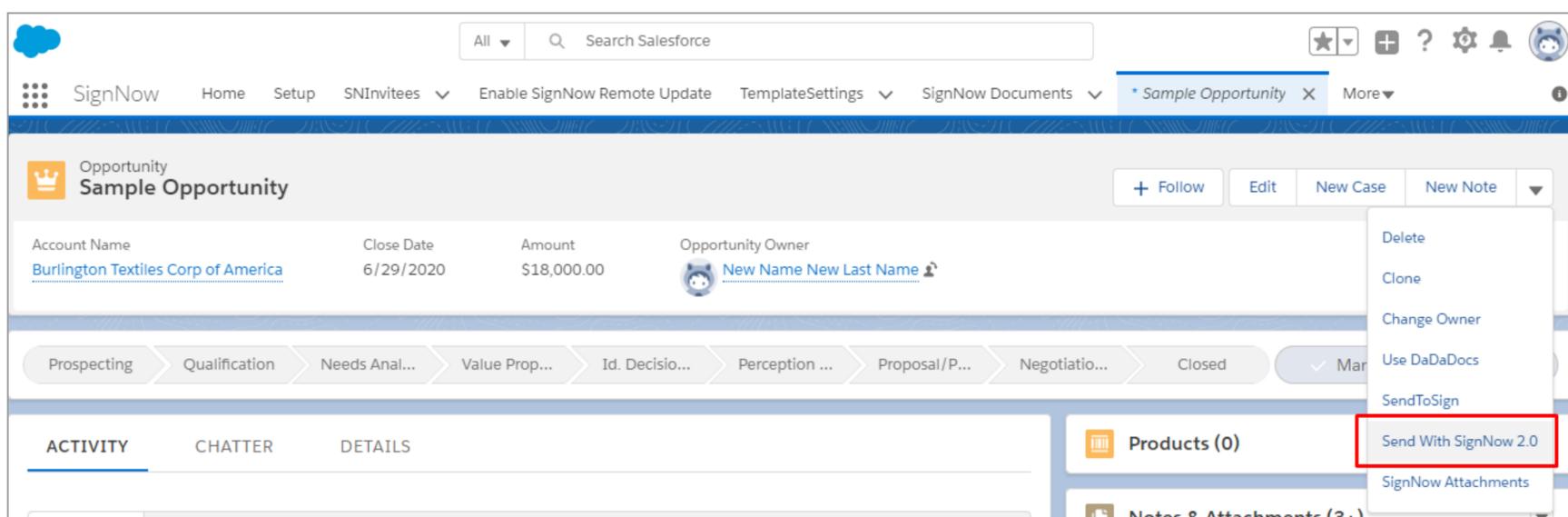
If both are checked, then the document fields will be updated with the data from Salesforce record fields and then after a user has changed it, it will be populated in the Salesforce record fields.

Salesforce Annotations

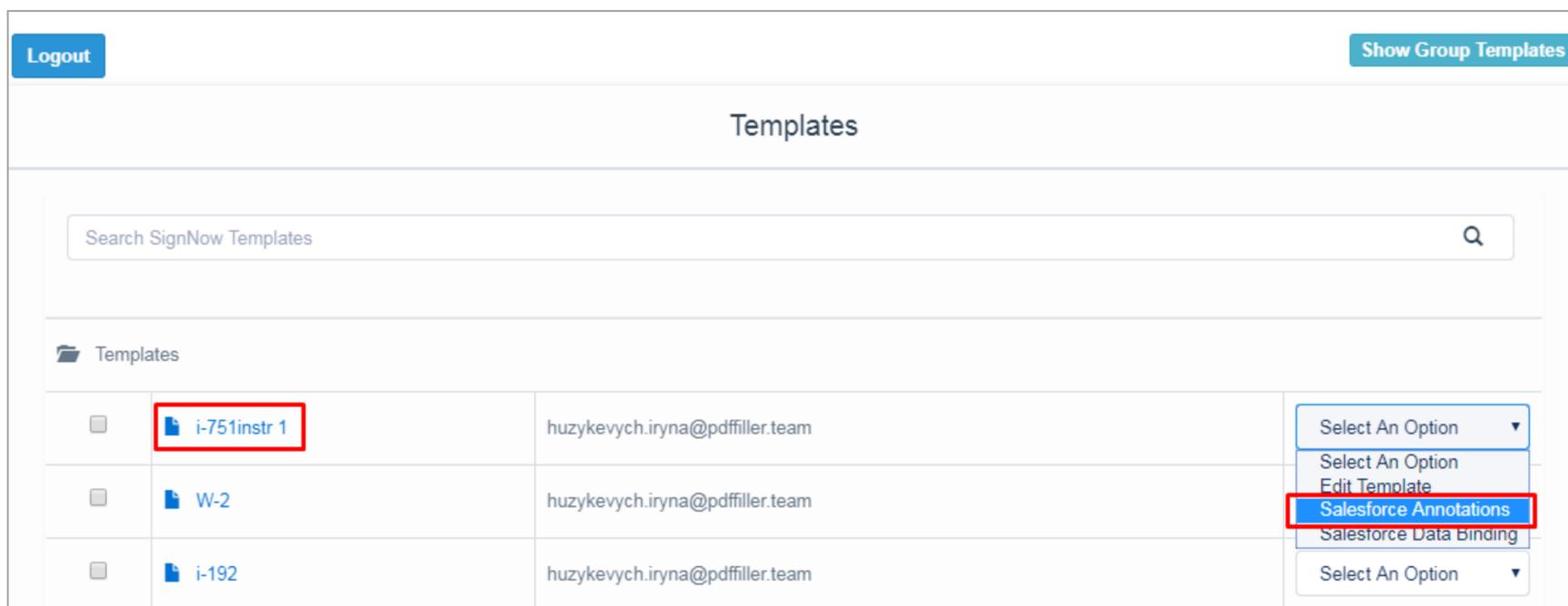
Easily add Salesforce Annotation Fields to your SignNow templates and connect them to the Salesforce object record fields with Salesforce Annotations. Once your customers have received your template, such fields will be automatically filled with data from the particular Salesforce object record fields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

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

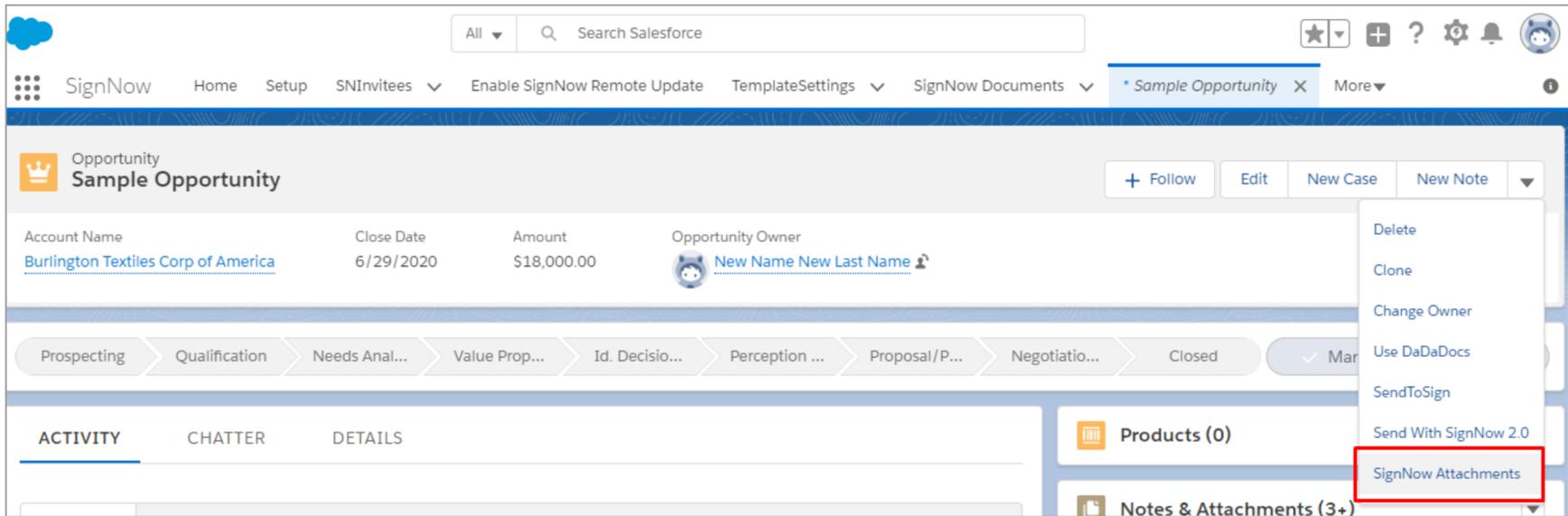
1. In your object, click on the *Send with SignNow* button.



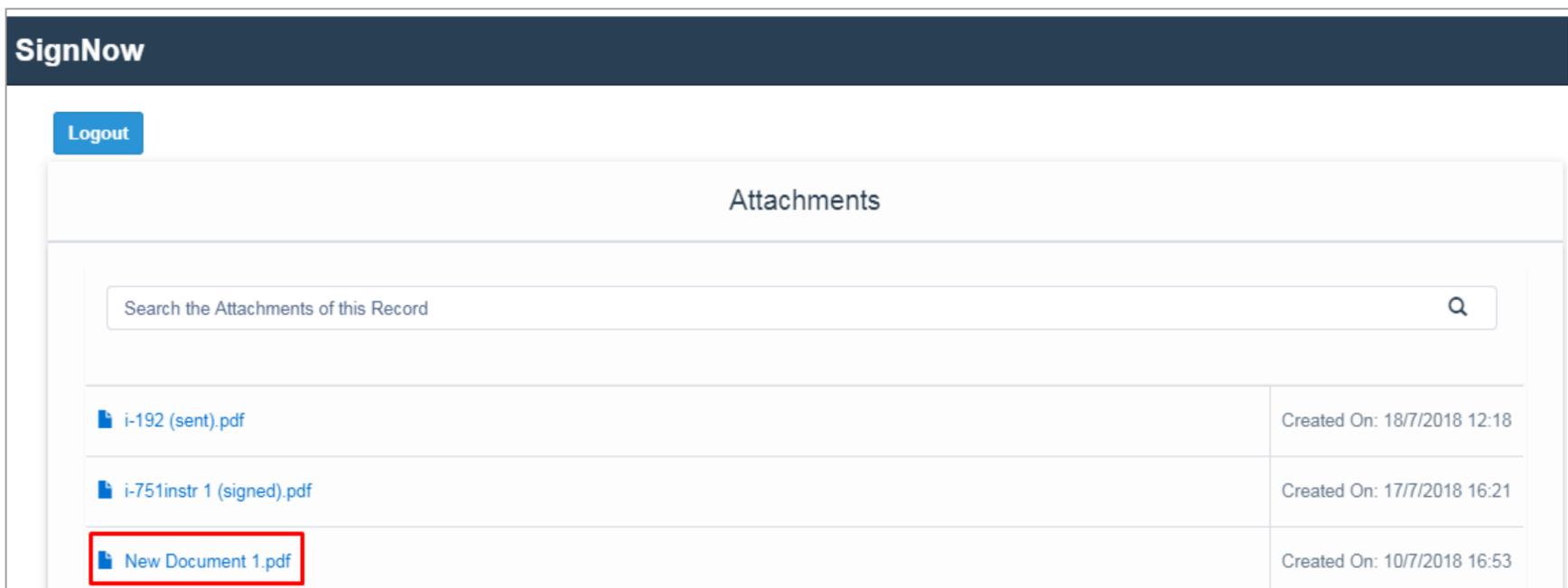
2. The Template tab will open. In the Select Option dropdown menu, select your desired template, choose Salesforce Annotations to add Salesforce annotation fields to your document in SignNow.



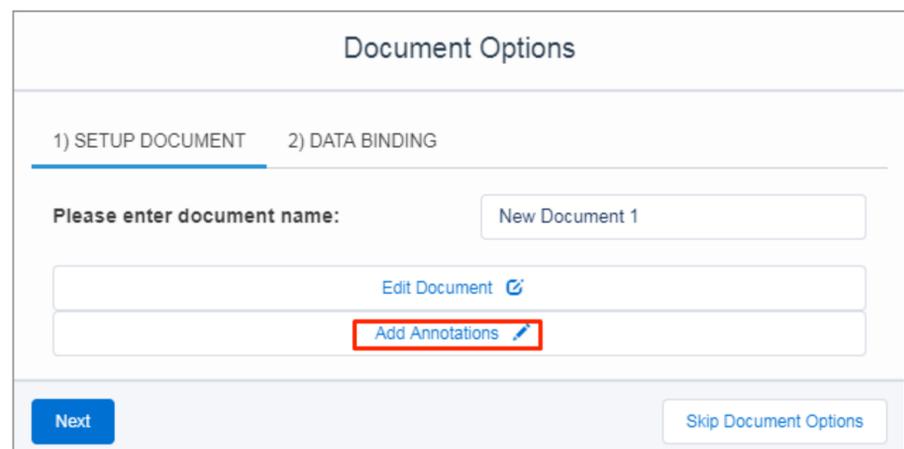
Alternatively, on your Salesforce object record page, click the SignNow Attachments button.



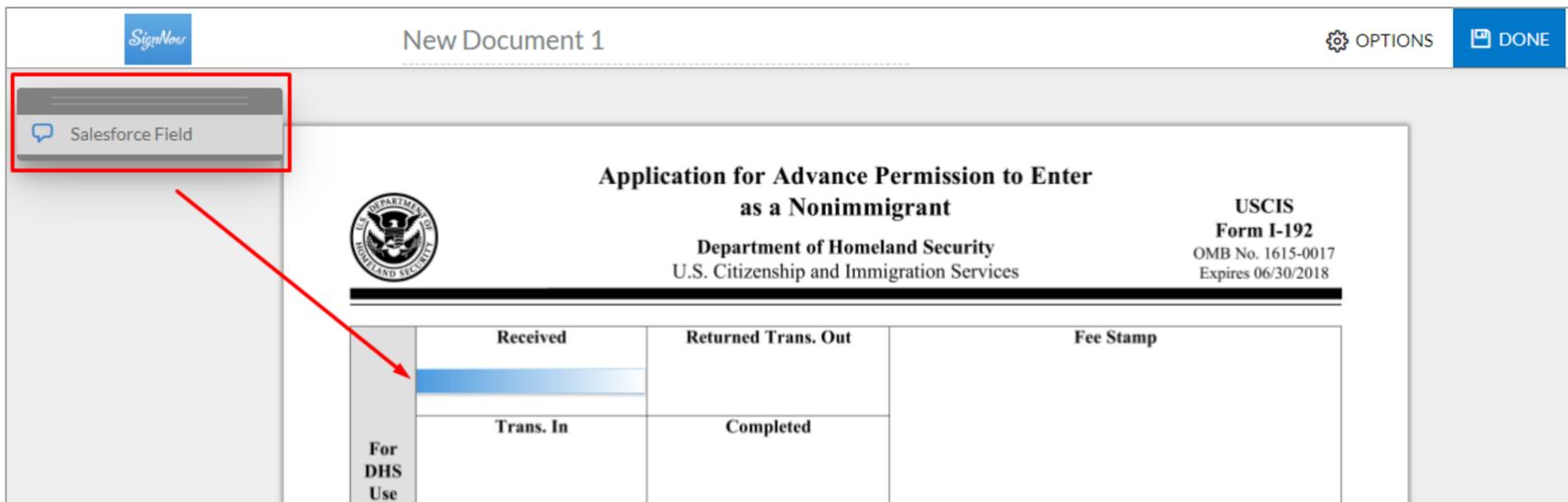
In the Attachments tab, click on the template you want to add Salesforce Annotations to.



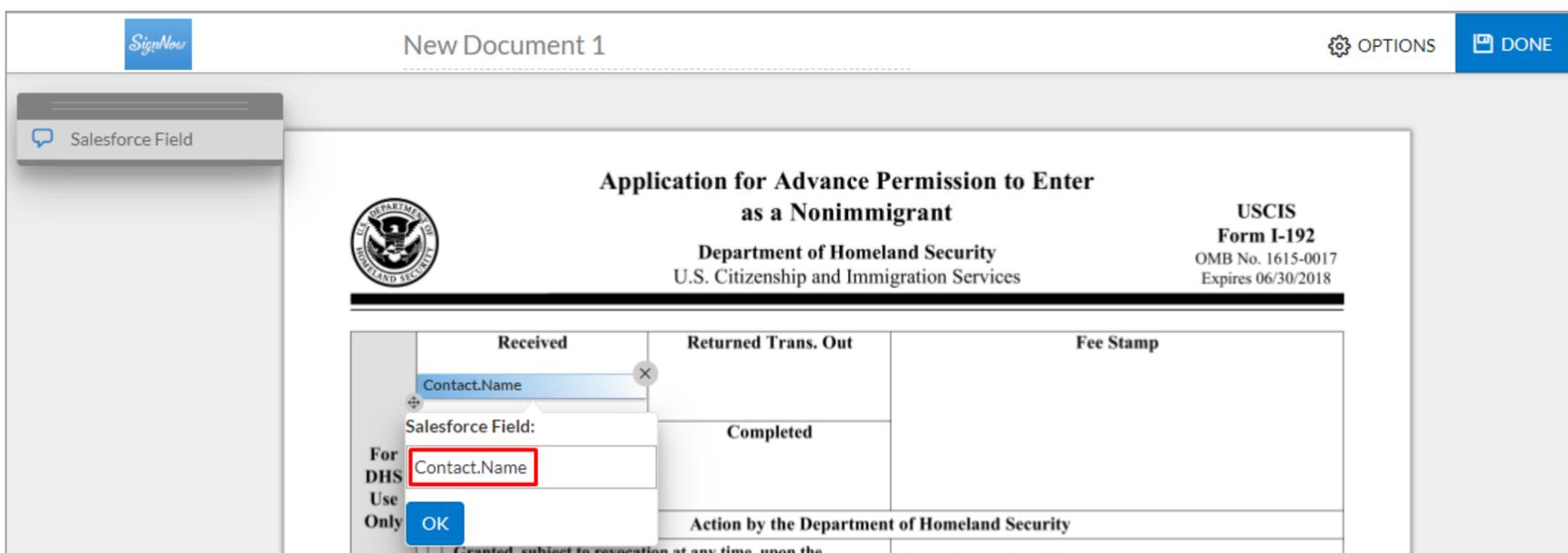
In the Document Options section, click the Add Annotations button at the bottom.



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**.

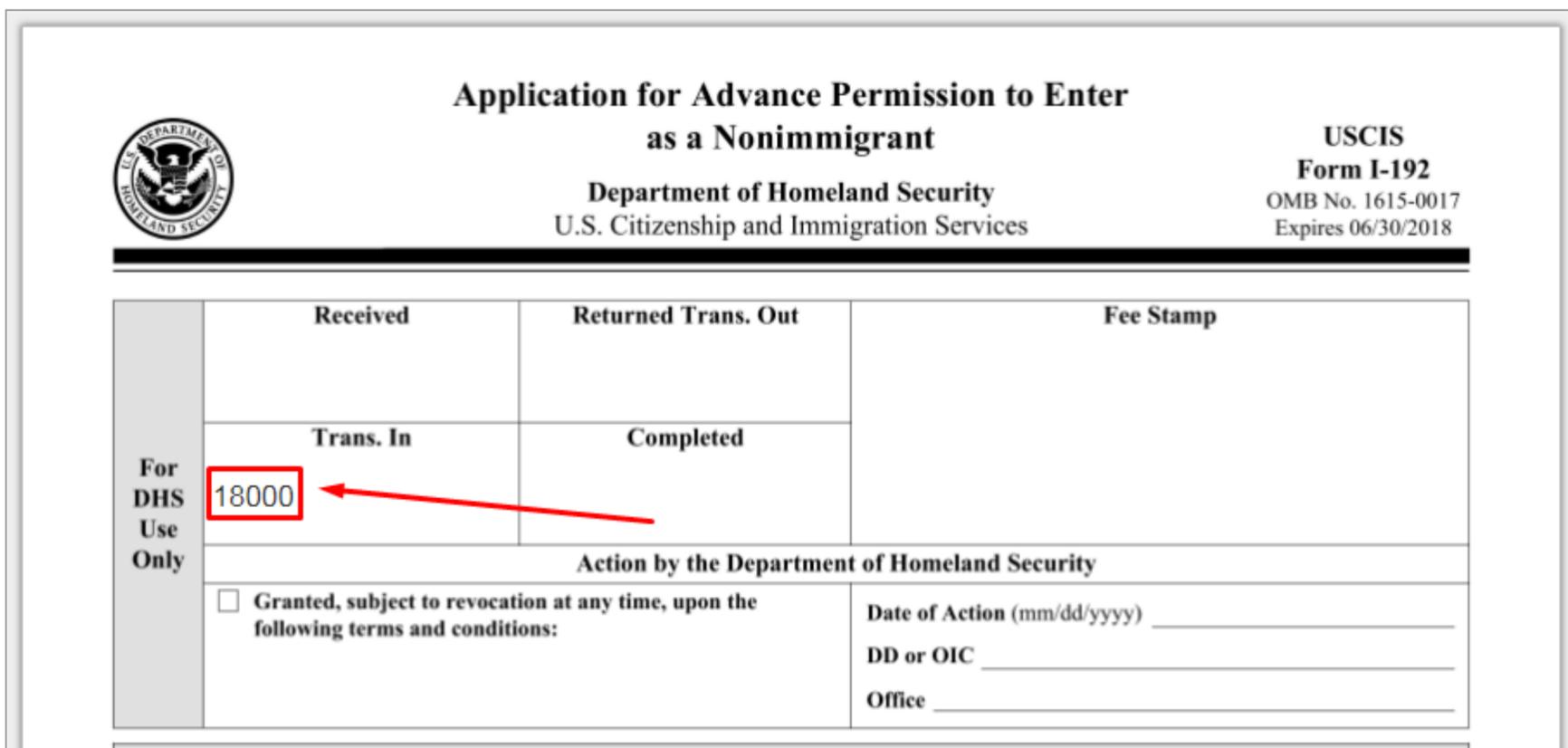
Note: You can connect information from the current object as well as from its parent objects to the Salesforce annotations. In this case, you have to enter the current object's name, its parent object's name and then specify the needed Salesforce field's name.

The screenshot shows the SignNow interface for a document titled "New Document 1". The document is a USCIS Form I-192, "Application for Advance Permission to Enter as a Nonimmigrant", from the Department of Homeland Security, U.S. Citizenship and Immigration Services. The form includes a table with columns for "Received", "Returned Trans. Out", and "Fee Stamp". A dropdown menu for "Salesforce Field" is open, showing "Contact.Campaign.Status" selected and highlighted with a red box. The menu also includes "Salesforce Field:", "For DHS Use Only", and an "OK" button. The top right corner has "OPTIONS" and "DONE" buttons.

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.

The screenshot shows the SignNow interface for a document titled "i-192". The document is a USCIS Form I-192, "Application for Advance Permission to Enter as a Nonimmigrant", from the Department of Homeland Security, U.S. Citizenship and Immigration Services. The form includes a table with columns for "Received", "Returned Trans. Out", and "Fee Stamp". A dropdown menu for "Salesforce Field" is open, showing "Opportunity.Amount" selected and highlighted with a red box. The menu also includes "Salesforce Field:", "For DHS Use Only", and an "OK" button. The top right corner has "OPTIONS" and "DONE" buttons.



**Application for Advance Permission to Enter
as a Nonimmigrant**

**Department of Homeland Security
U.S. Citizenship and Immigration Services**

**USCIS
Form I-192**
OMB No. 1615-0017
Expires 06/30/2018

| | | | |
|--|-----------|---|------------------|
| For DHS Use Only | Received | Returned Trans. Out | Fee Stamp |
| | Trans. In | Completed | |
| | 18000 | | |
| Action by the Department of Homeland Security | | | |
| <input type="checkbox"/> Granted, subject to revocation at any time, upon the following terms and conditions: | | Date of Action (mm/dd/yyyy) _____ DD or OIC _____ Office _____ | |

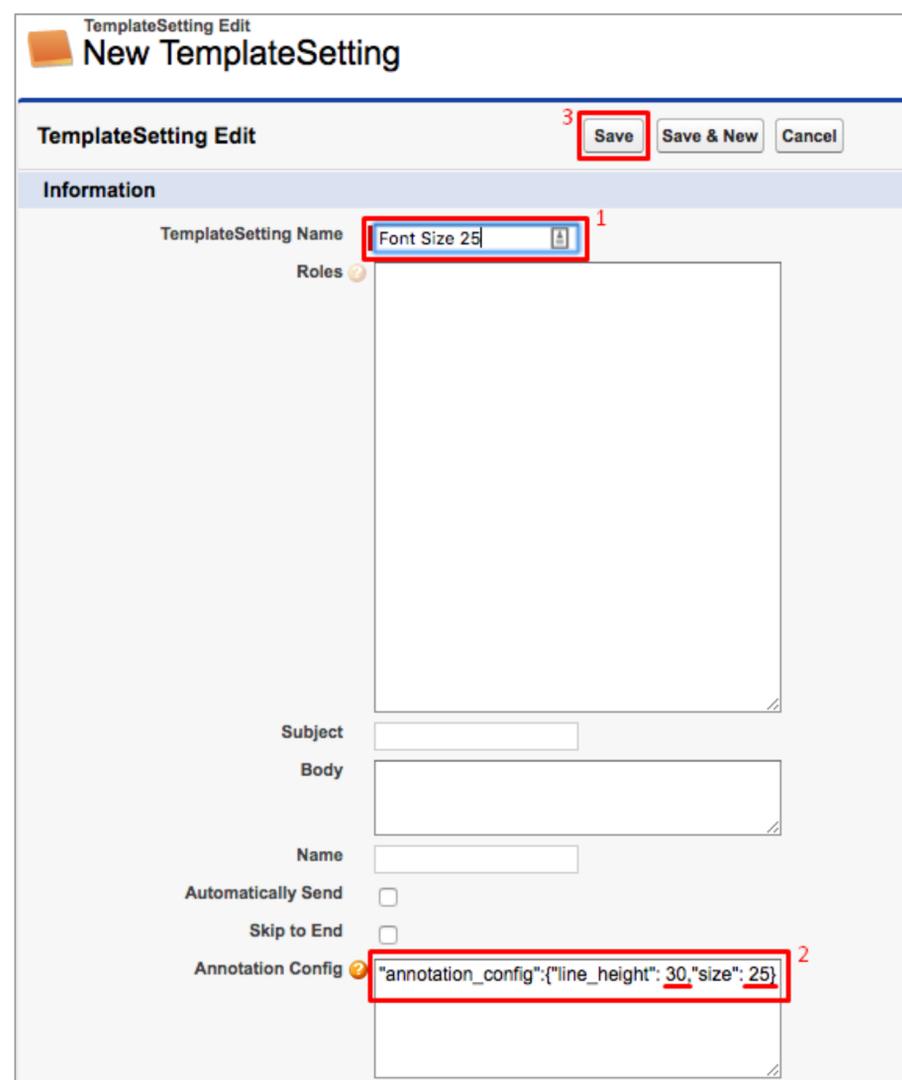
If you want to customize the line height or font size of the text to be added, go to the TemplateSettings section in the main menu. Then choose New to create a new TemplateSetting.

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.



TemplateSetting Edit
New TemplateSetting

3 **Save** **Save & New** **Cancel**

Information

TemplateSetting Name: 1

Roles:

Subject:

Body:

Name:

Automatically Send:

Skip to End:

Annotation Config:

Document Status

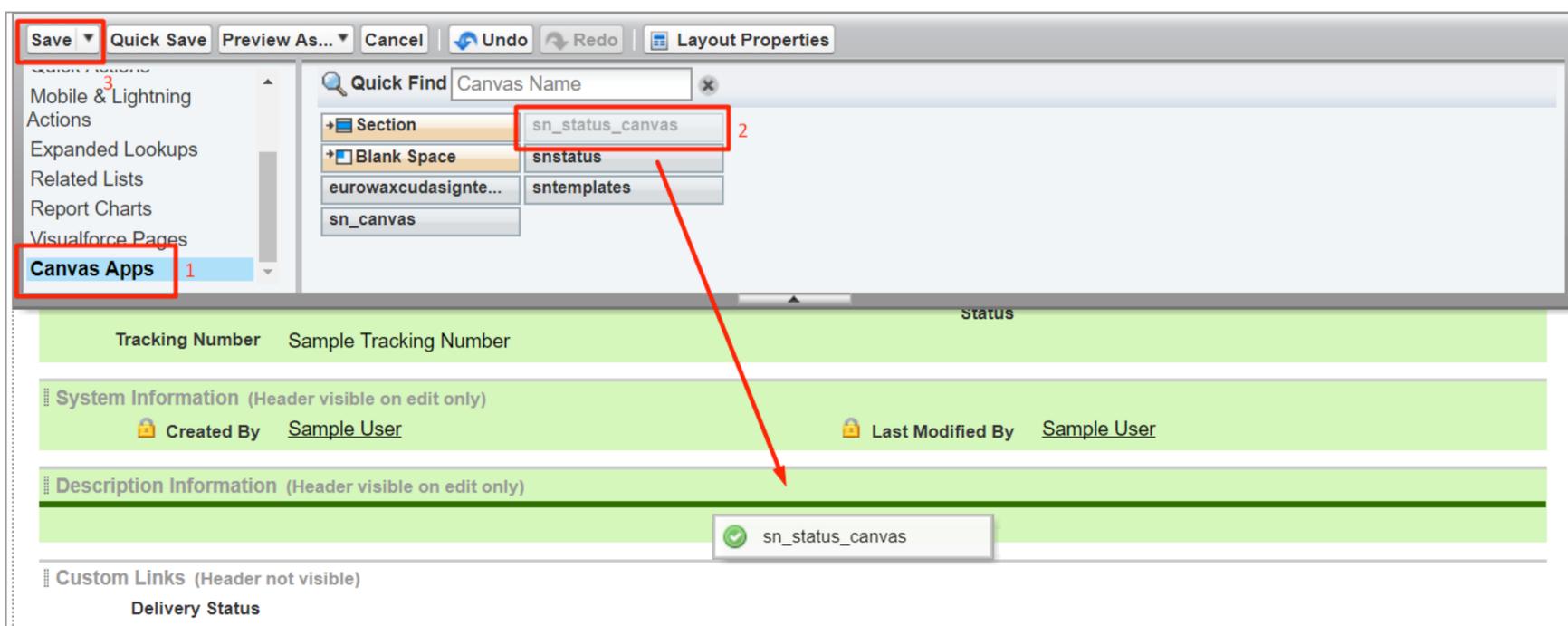
Easily track the status of your documents you have sent out to be e-signed as well as instantly get all details about documents sent such. To do this, just add SignNow Status canvas or SignNowStatuses to your object page.

Canvas Status

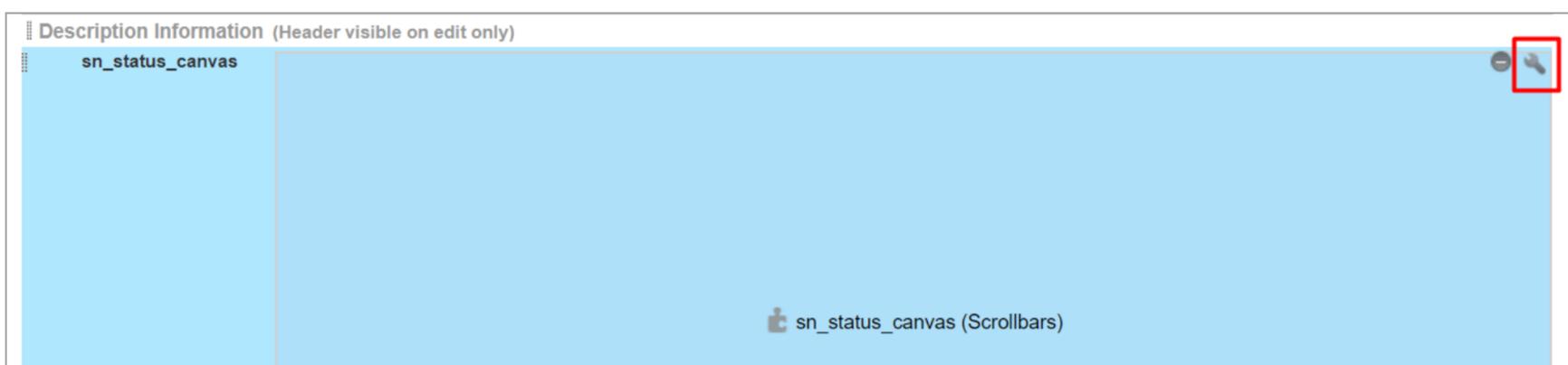
View, update or cancel your signature requests as well as download signed documents directly in the SignNow Status canvas. All the sent requests are shown in the table with the following details: name of the document (or group of documents), recipient email(s), status (pending or fulfilled), date sent,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

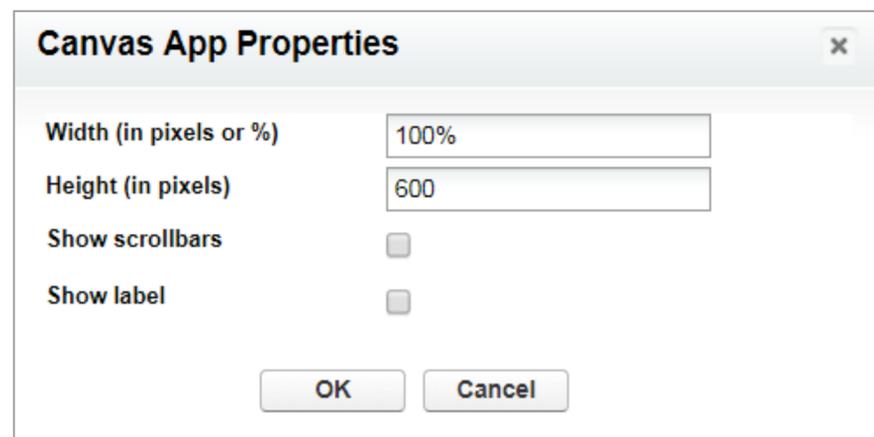
Select *Canvas Apps*, find `sn_status_canvas`, drag and drop it in the object information area.



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.



Canvas App Properties

Width (in pixels or %)

Height (in pixels)

Show scrollbars

Show label

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.

| SignNow | | | | | | |
|-----------------------|------------------------------------|-----------|-----------------|-----------------|-----------------------------------|------------------|
| Show Bulk Invite Logs | | | | | | Show canceled |
| NAME | SENT TO | STATUS | DATE SENT | DATE SIGNED | EXPIRATION | OPTIONS |
| i-751instr 1 | (1) sfacc1615@gmail.com (signed) | fulfilled | 10/7/2018 13:53 | 17/7/2018 13:21 | sfacc1615@gmail.com (9/8/2018) | Select An Option |
| i-192 | (1) sfacc1615+1@gmail.com | pending | 18/7/2018 9:18 | | sfacc1615+1@gmail.com (17/8/2018) | Select An Option |

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

| STATUS | DATE SENT | DATE SIGNED | EXPIRATION | OPTIONS |
|----------------|-----------------|-----------------|-----------------------------------|--|
| fulfilled | 10/7/2018 13:53 | 17/7/2018 13:21 | sfacc1615@gmail.com (9/8/2018) | Select An Option |
| <u>pending</u> | 18/7/2018 9:18 | | sfacc1615+1@gmail.com (17/8/2018) | Select An Option Replace Signer Advanced Settings Cancel Invite |

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

| | | | |
|-----------|-----------------|-----------------------------------|--|
| pending | 15/1/2018 14:43 | sfacc14+005@gmail.com (14/2/2018) | Select An Option ▼ Select An Option Replace Signer Advance Settings Cancel Invite |
| pending | 16/1/2018 9:09 | sfacc14+005@gmail.com (15/2/2018) | |
| fulfilled | 16/1/2018 9:12 | 16/1/2018 9:11 | |

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

| | | | |
|-----------|-----------------|-----------------------------------|--|
| pending | 15/1/2018 14:43 | sfacc14+005@gmail.com (14/2/2018) | Select An Option ▼ Select An Option Replace Signer Advance Settings Cancel Invite |
| pending | 16/1/2018 9:09 | sfacc14+005@gmail.com (15/2/2018) | |
| fulfilled | 16/1/2018 9:12 | 16/1/2018 9:11 | |

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.

| | | | |
|-----------|-----------------|-----------------------------------|--|
| pending | 15/1/2018 14:43 | sfacc14+005@gmail.com (14/2/2018) | Select An Option ▼ Select An Option Replace Signer Advance Settings Cancel Invite |
| pending | 16/1/2018 9:09 | sfacc14+005@gmail.com (15/2/2018) | |
| fulfilled | 16/1/2018 9:12 | 16/1/2018 9:11 | |

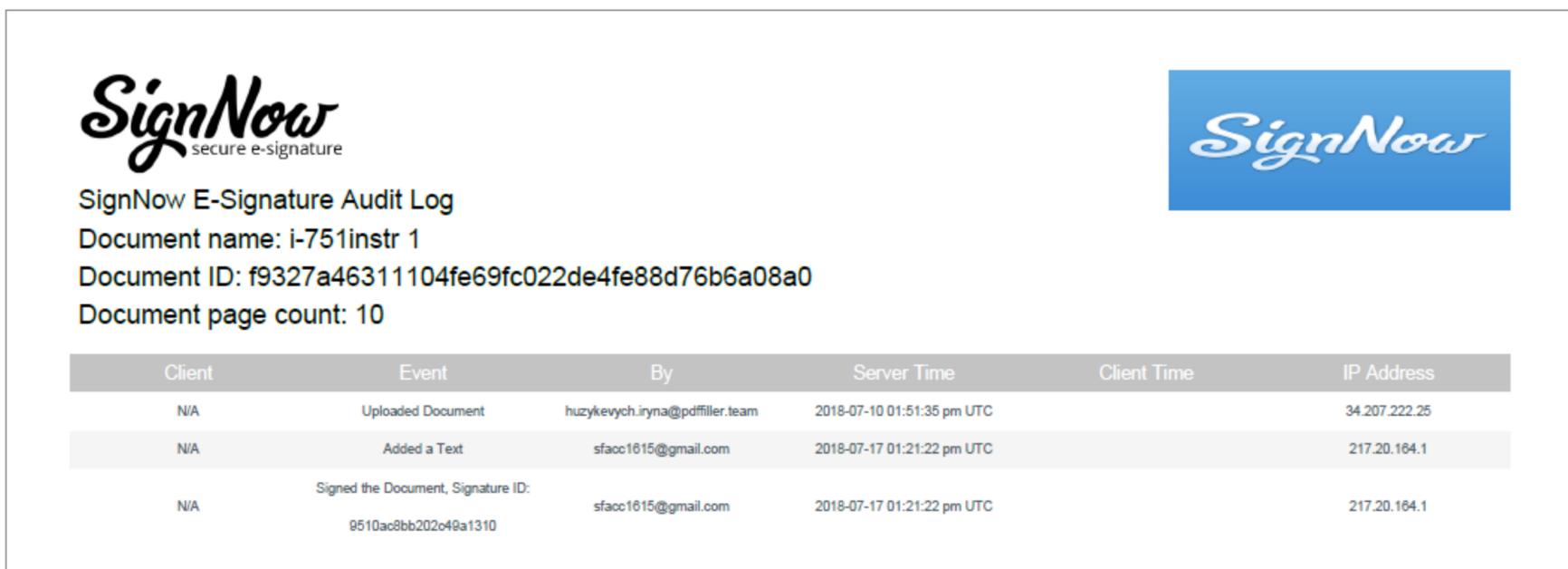
Click *Show Canceled* to display all the invites including the canceled ones.

| Show canceled | | | | |
|----------------------|-----------------|-----------------|-----------------------------------|--------------------|
| STATUS | DATE SENT | DATE SIGNED | EXPIRATION | OPTIONS |
| fulfilled | 10/7/2018 13:53 | 17/7/2018 13:21 | sfacc1615@gmail.com (9/8/2018) | Select An Option ▼ |
| pending | 18/7/2018 9:18 | | sfacc1615+1@gmail.com (17/8/2018) | Select An Option ▼ |

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.



The screenshot shows the SignNow E-Signature Audit Log interface. It includes the SignNow logo, document details, and an audit log table.

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 | huzkyevych.iryina@pdfiller.team | 2018-07-10 01:51:35 pm UTC | | 34.207.222.25 |
| N/A | Added a Text | sfaoc1615@gmail.com | 2018-07-17 01:21:22 pm UTC | | 217.20.164.1 |
| N/A | Signed the Document, Signature ID: 9510ac8bb202c49a1310 | sfaoc1615@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.

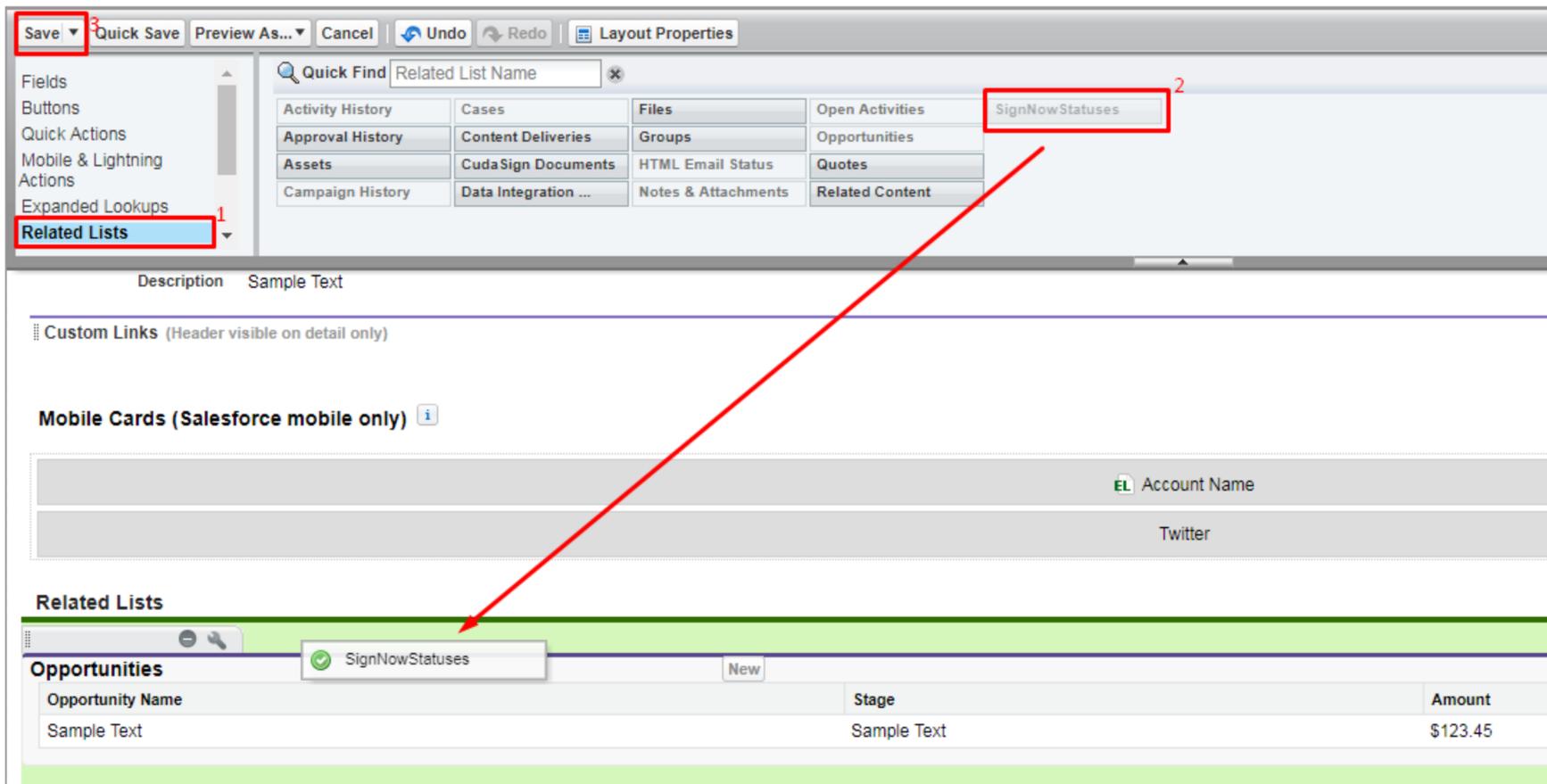
Currently, *SignNowStatuses* are preset for the following objects:

- 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.

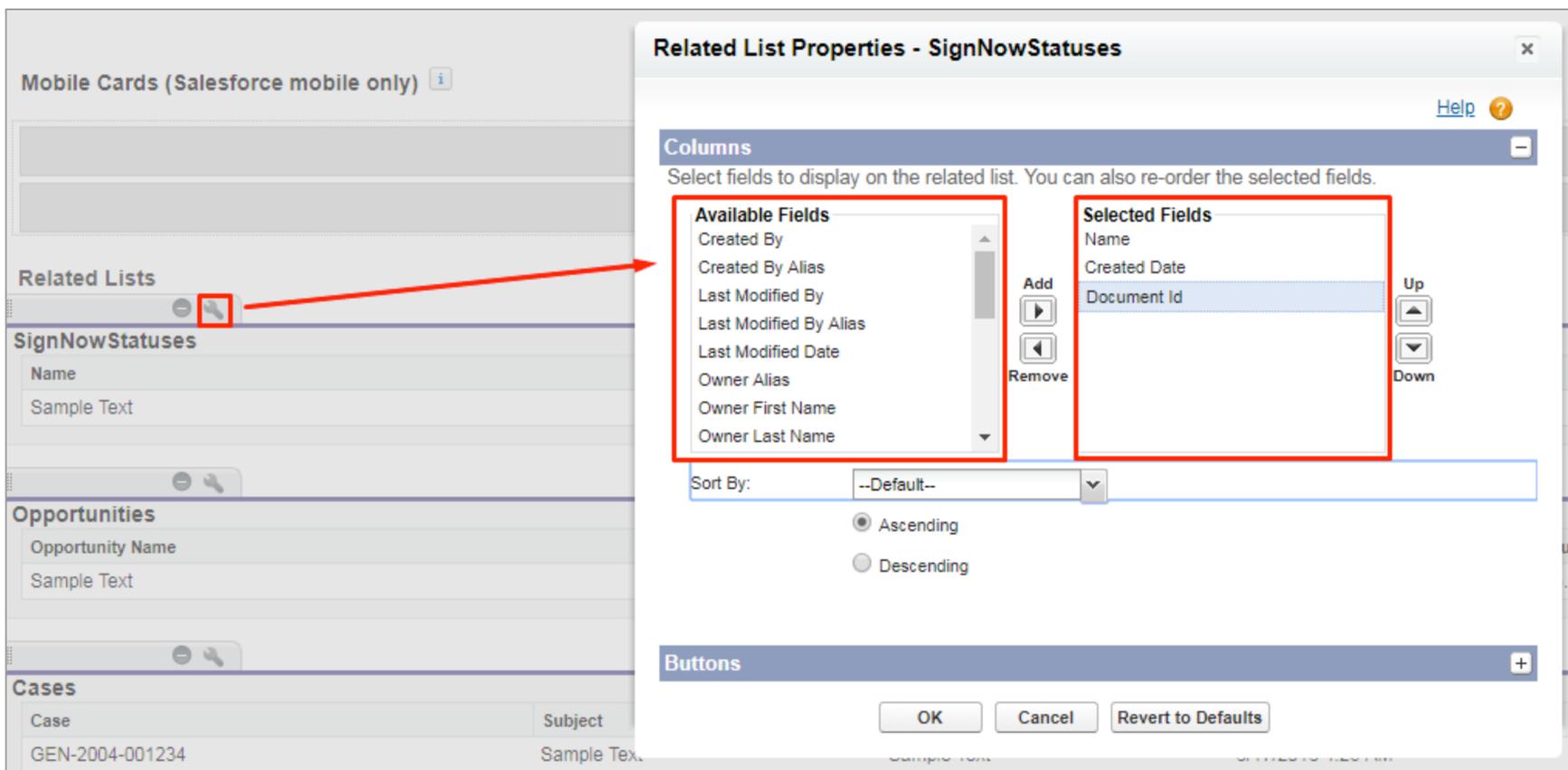
On your object record page click *Edit Layout* (alternatively, use Quick Find to select the object page and then click *Edit*).

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.

Ms. Babara Levy

SignNowStatuses [1] | Opportunities [0] | Cases [2] | Open Activities [0] | Activity History [0] | Campaign History [0] | Notes

Contact Detail [Edit] [Delete] [Clone] [Send With SignNow]

Contact Owner: [New Name New Last Name](#) [Change]

Name: Ms. Babara Levy

Account Name: [Express Logistics and Transport](#)

Title: SVP, Operations

Department: Operations

Birthdate: 5/14/1935

Reports To: [\[View Org Chart\]](#)

Lead Source: Word of mouth

Mailing Address: 620 SW 5th Avenue Suite 400
Portland, Oregon 97204
United States

Languages: English

Created By: [New Name New Last Name](#), 6/24/2018 3:18 PM

Description:

[Edit] [Delete] [Clone] [Send With SignNow]

SignNowStatuses [New SignNowStatus]

| Action | Name |
|--|--------------------------------|
| Edit Del | New Document 1 |

Click on a document to view its status and details.

SignNowStatus Detail [Edit] [Delete] [Clone]

| | |
|---------------|---|
| Name | New Document 1 |
| Status | pending |
| Record Id | 0031H00001s2DBsQAM |
| Record Type | Contact |
| Sent To | 1) sfacc1615+1@gmail.com |
| SN_Documet_Id | 35a8ba585f7e9dc92e6c498ad28342be11e8f4de |
| Created By | New Name New Last Name , 8/17/2018 5:01 AM |

[Edit] [Delete] [Clone]

SNEmails [New SNEmail]

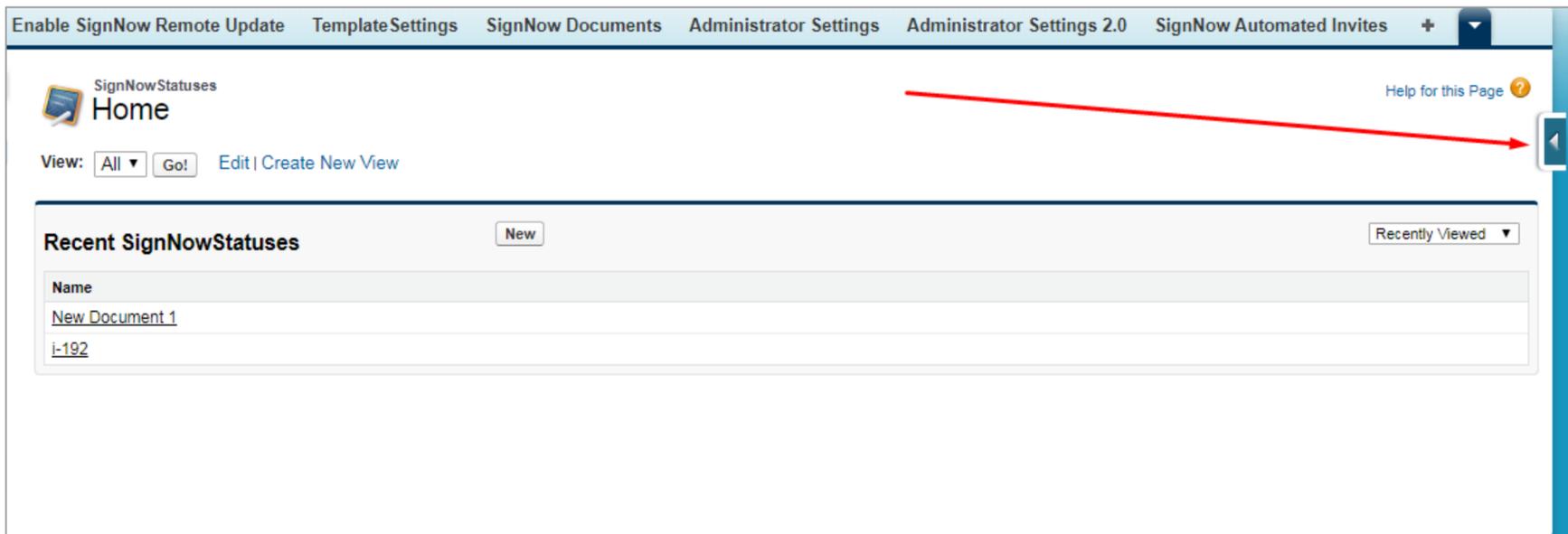
| Action | Order | Email |
|--|-------|--|
| Edit Del | 1 | sfacc1615+1@gmail.com |

[^ Back To Top](#) Alw

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.

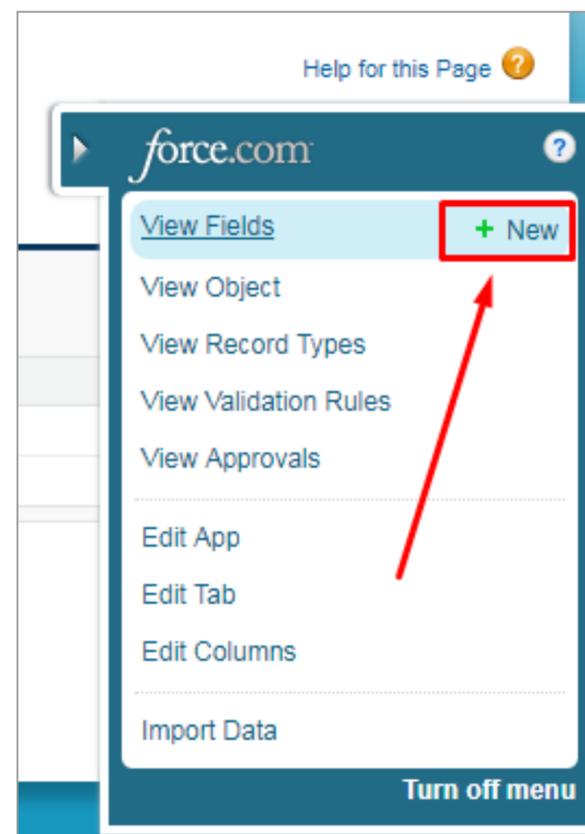
Note: If the SignNowStatuses section doesn't appear in the main menu, click the plus icon and find it in the All Tabs list.



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.

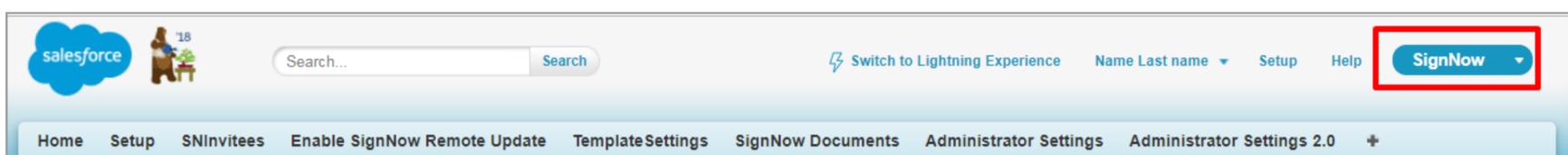


Administrator Settings

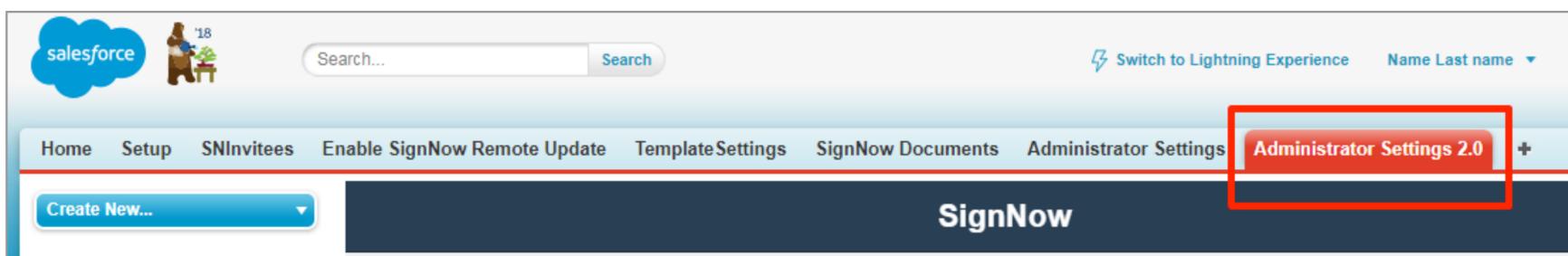
Store Documents in Salesforce Org

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

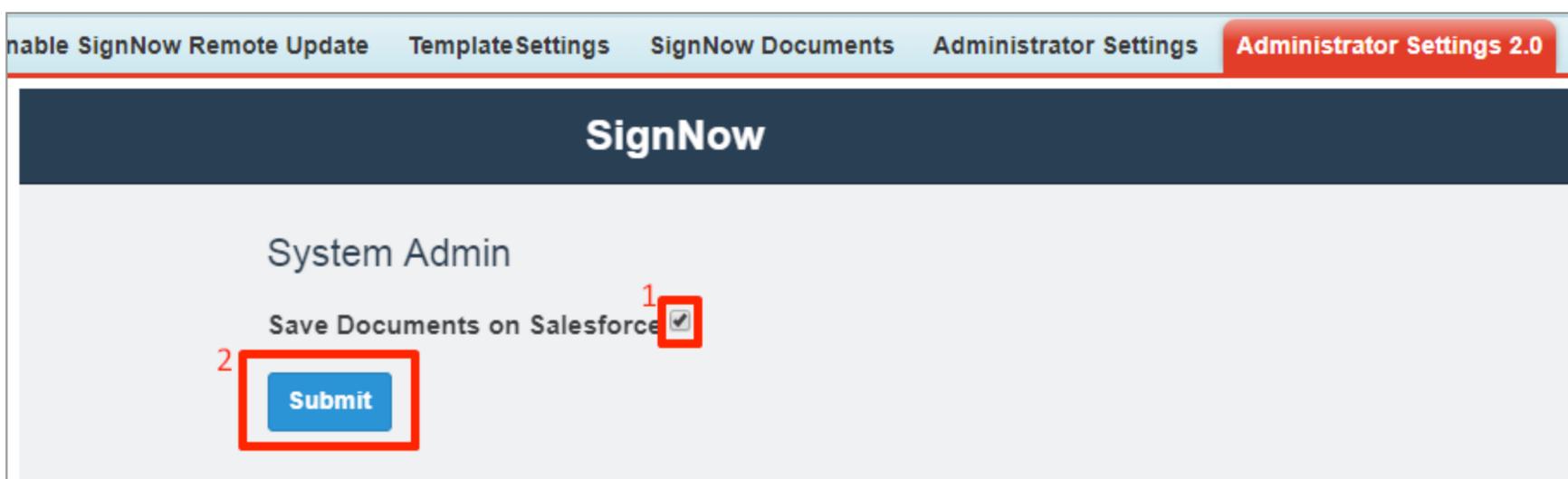
1. In the upper right of your Salesforce org main menu, select SignNow.



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.