

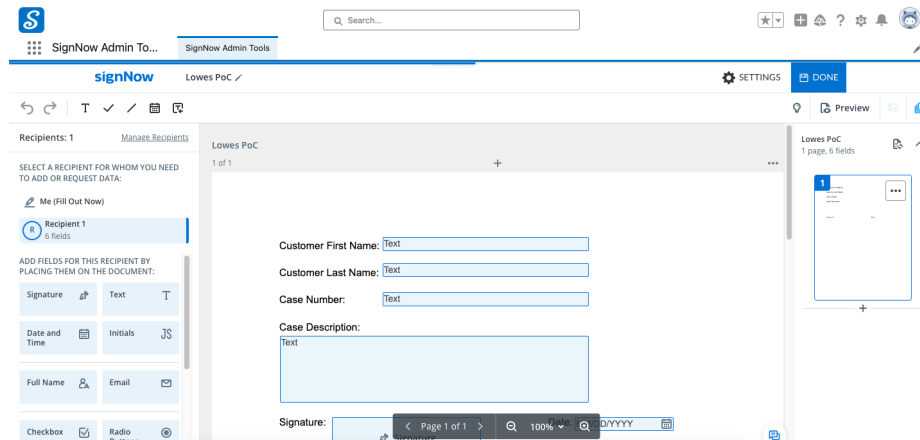
SignNow for Salesforce

December 2024

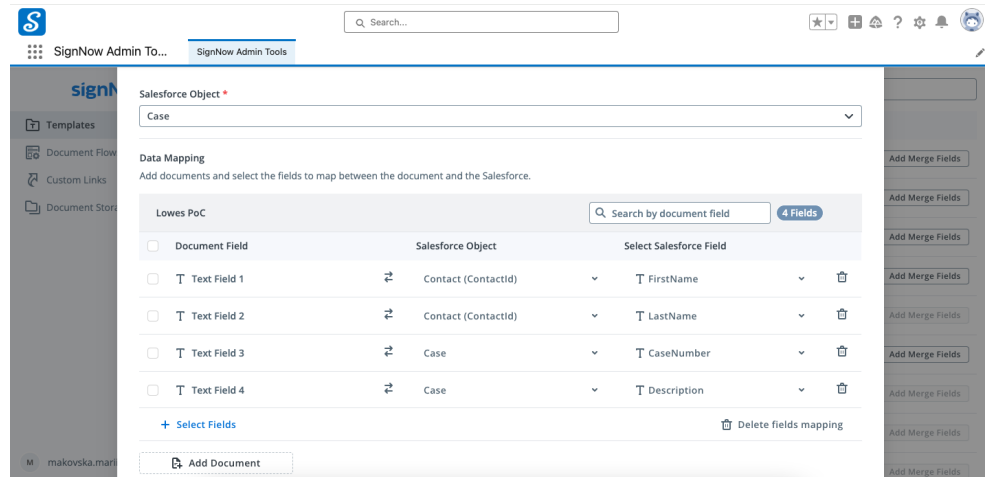
We are excited to introduce a new version of **SignNow for Salesforce** native application.

With SignNow for Salesforce, **Salesforce Admins** can:

- Configure document group templates in SignNow without leaving Salesforce



- Configure data binding between Salesforce fields and SignNow template fields, for pre-fill and update



- Customize Sender's flow to make it a one click send

Document Flow Name *

Send Contract Demo Dec 3 2024

Document Name ?

Send Contract Demo Dec 3 2024

Configure Sender's experience

- ☒ **Hide the "Enter document name" screen**
Configure the SignNow document flow that can be connected to a Salesforce custom buttons or links.
- ☒ **Hide the "Add Fields" screen**
When this option is checked, the Sender will not be able to add fields to the document
- ☒ **Hide the "Map Fields" screen**
When this option is checked, the Sender will not be able to map document fields to Salesforce fields.
- ☒ **Hide the "Add Recipients" screen**
When this option is checked, the Sender will not be able to add recipients for the document.

Cancel Next to Customization

- Customize invite email Subject and Body, and enrich it with Salesforce data

☒ Document Flow Info
 ☒ **Message Customization**
☐ Recipients

Email Message Customization
Configure the email message to signers.

This configuration will override email message settings stored in the selected template.

To use the original email message from the template, leave this section blank, and proceed to the next step.

Subject

Your contract is ready to sign!

Body

Hey {{Contact.FirstName}}

Please sign this contract at your earliest convenience!

Thank you for your custom!

Body

Hey {{Contact.FirstName}}

Please sign this contract at your earliest convenience!

Thank you for your custom!

Tag Builder

To create a merge tag, select Salesforce object and field. Copy tags to the message body to add personalization.

Salesforce object
 Select an object

Salesforce field
 Select a field

{{Object.Field}}

Back to Document Info Next to Recipients

- Dynamically define recipients from Salesforce fields

✓ Document Flow Info — ✓ Message Customization — ● Recipients

Recipients

Configure recipients who will need to sign.

This configuration will override settings stored in the selected template.

To use the original recipients from the template, leave this section blank, and proceed to the next step.

To: Recipients receive documents in order ☒

1

R Recipient 1 /

☐ Sender's email ⓘ

⋮

{{Contact.Email}}

⚙️ 🗑️

+ Add Recipient

Tag Builder

To: Recipients receive documents in order ☒

1

R Recipient 1 /

☐ Sender's email ⓘ

⋮

{{Contact.Email}}

⚙️ 🗑️

+ Add Recipient

Tag Builder ^

To create a merge tag, select Salesforce object and field.
Copy tags to the Recipient fields to pull the recipient contact from the Salesforce record.

Salesforce object	Salesforce field
Contact ▾	Email ▾

{{Contact.Email}}

📋

Back to Customization Save

Salesforce Users can:

- Select files attached to a Salesforce record, add fillable fields and recipients, and send for signing - all without leaving Salesforce

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Q Search...

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⚙️

🔔

👤

SignNow Admin To...

SignNow Admin Tools

* Andy Jones / Contact ▾ X

signNow Select File

Q Search

✓ Name ▾	Size	Last Modified
🔍 📄 Employee NDA	27Kb	Dec 19, 2024 3:56 PM

1 — 1 of 1

📄

1 file is selected

Click the "Proceed" button below to send the file for signing.

Proceed

Back to Record

☐ Show supported files only

SignNow Admin To... SignNow Admin Tools *Andy Jones / Contact

Employee NDA (7) Add Prepare Set Up and Send

Recipients: 1 [Manage Recipients](#)

SELECT A RECIPIENT FOR WHOM YOU NEED TO ADD OR REQUEST DATA:

Me (Fill Out Now)

Recipient 1
0 fields

ADD FIELDS FOR THIS RECIPIENT BY PLACING THEM ON THE DOCUMENT:

Signature Text T

Date and Time Initials JS

Full Name Email

Checkbox Radio

By signing the below, you agree not to tell anyone where we get our dinosaurs.

I Agree:

Employee Name: EmployeeName

Signature: Signature

Date: MM/DD/YYYY

Page 1 of 1 100%

Employee NDA (7) 1 page, 3 fields

DINOSAUR PARK
EMPLOYEE NDA

We require the below you agree not to tell anyone where we get our dinosaurs.

I Agree:

Employee Name: EmployeeName

Signature: Signature

Date: MM/DD/YYYY

- Send SignNow templates pre-filled with Salesforce data in one click

SignNow Admin To... SignNow Admin Tools *Andy Jones / Contact *00001031 / Case

Send Invite

From: makovska.maria@pdffiller.team

To:

Recipient 1

Enter Email

Customize Message

Add Payment Request

CC Recipients @

Enter Email(s)

Actions On Completion

Send Invite

1 Document [Edit](#)

Employee NDA (7) 1 page | 2 fields

DINOSAUR PARK
EMPLOYEE NDA

We require the below you agree not to tell anyone where we get our dinosaurs.

I Agree:

Employee Name: EmployeeName

Signature: Signature

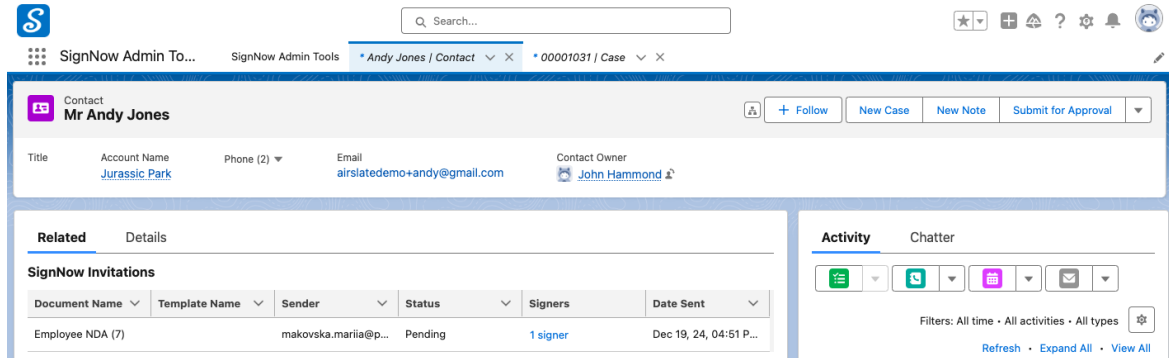
Date: MM/DD/YYYY

Select Template

Sort by: Name A-z 50 templates available

CONTRACT Includes: CONTRACT	CONTRACT Includes: CONTRACT	CONTRACT Demo 2511 Includes: CONTRACT	CONTRACT Demo 3-12 Includes: CONTRACT
DG 3 doc 2 signers Includes: curl, plt, mikkie mouse	Lowes PoC Includes: Lowes PoC	t Includes: Calculated Fields, Conditional Fie...	t Includes: 123123131231312

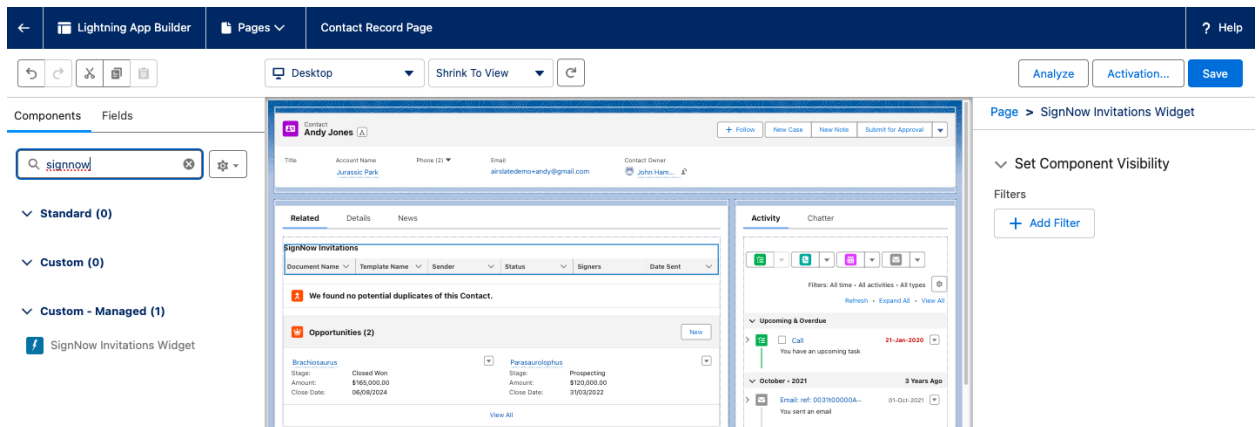
- Track the progress of signature invites without leaving Salesforce



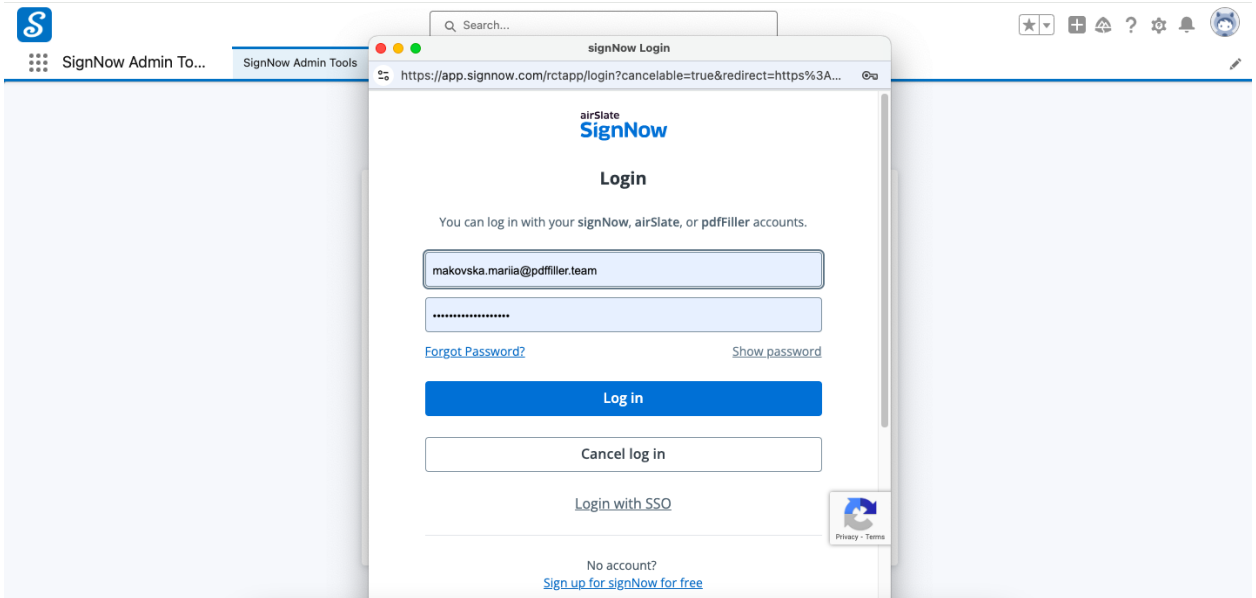
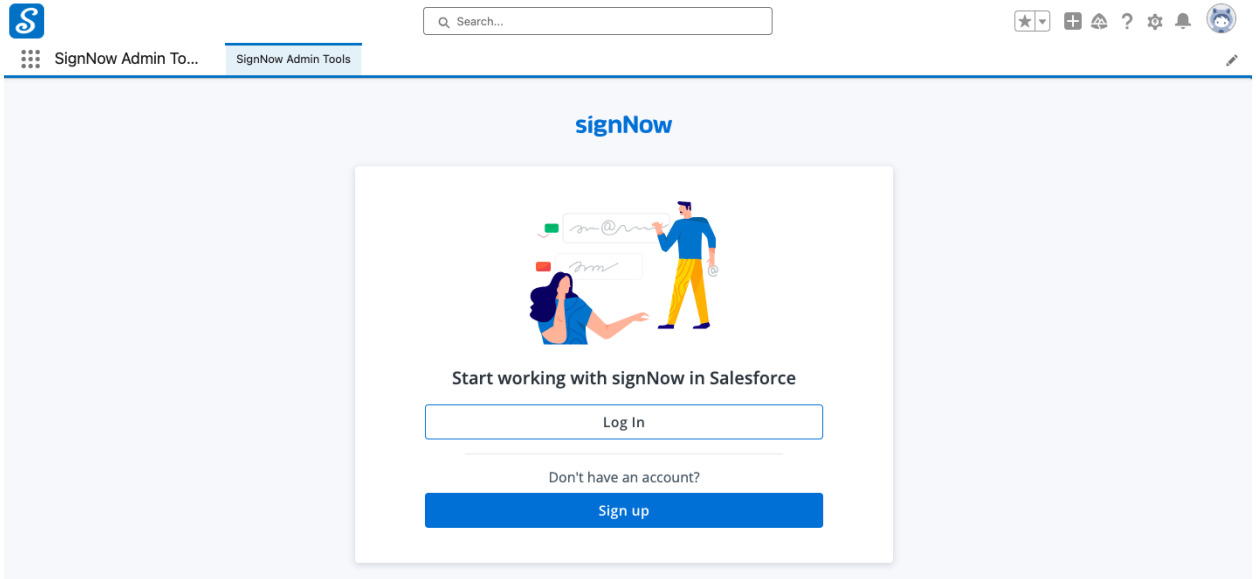
- Get completed documents stored in Salesforce records.

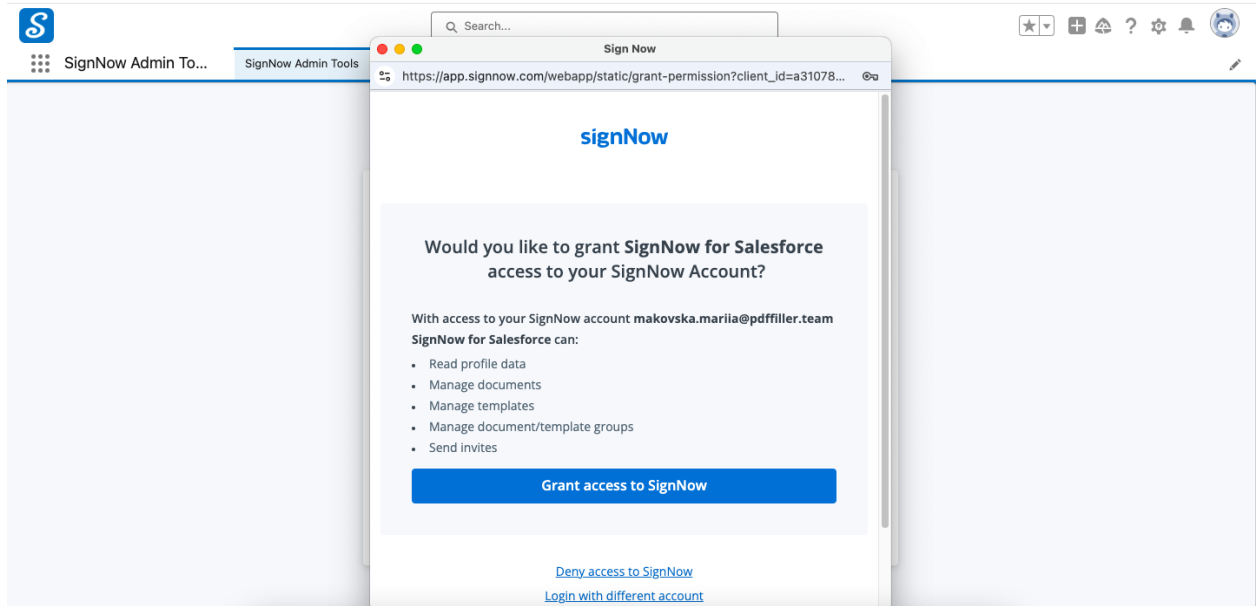
How to configure:

1. Install package from the official [AppExchange listing](#).
The installation should be For Admins Only.
2. Assign the “SignNow SF PS” permission set to any users who will need to use this integration.
3. (optional) Add the “SignNow Invitations” widget to pages where users will need to see the status of SignNow signature invites:

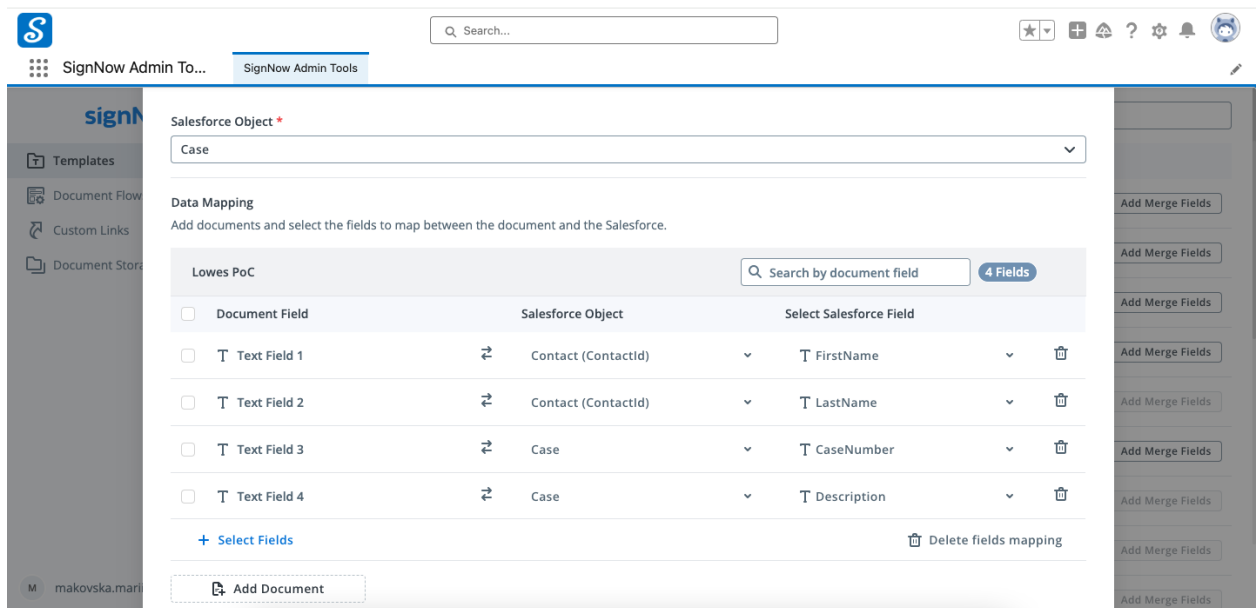


4. Go to App Launcher > SignNow Admin Tools. Click the Log In button to log in to your SignNow account, and grant access to the SignNow for Salesforce app:





5. (optional) SignNow Admin Tools > Templates:
In the list of Templates, locate the document group template that you will need to use.
Click the “Add Merge Fields” button to map your Salesforce object fields to the template fields, for pre-fill and update.



6. SignNow Admin Tools > Documents Flows:
Click the “Create Document Flow” button to customize sender experience, set up invite emails and recipients:

SignNow Admin To...

SignNow Admin Tools

signNow

- Templates
- Document Flows
- Custom Links
- Document Storage

Document Flows 2

Create Document Flow

Document Flow Name	Created Date	Created By	
Pre-release Demo	9 Dec 2024	makovska.maria@pdfiller.team	Edit Trash
Send Contract Demo Dec 3 2024	2 Dec 2024	makovska.maria@pdfiller.team	Edit Trash

1 — 2 of 2

SignNow Admin To...

SignNow Admin Tools

Document Flow Name *

Document Name

Configure Sender's experience

☒

Hide the "Enter document name" screen

Configure the SignNow document flow that can be connected to a Salesforce custom buttons or links.

☒

Hide the "Add Fields" screen

When this option is checked, the Sender will not be able to add fields to the document

☒

Hide the "Map Fields" screen

When this option is checked, the Sender will not be able to map document fields to Salesforce fields.

☒

Hide the "Add Recipients" screen

When this option is checked, the Sender will not be able to add recipients for the document.

Cancel

Next to Customization

SignNow Admin To...

SignNow Admin Tools

Email Message Customization

Configure the email message to signers.

This configuration will override email message settings stored in the selected template.

To use the original email message from the template, leave this section blank, and proceed to the next step.

Subject

Body

Tag Builder

To: Recipients receive documents in order ☒

1

R Recipient 1

☐ Sender's email

{{Case.ContactEmail}}

+ Add Recipient

Tag Builder ^

To create a merge tag, select Salesforce object and field.
Copy tags to the Recipient fields to pull the recipient contact from the Salesforce record.

Salesforce object	Salesforce field
Case	ContactEmail

{{Case.ContactEmail}}

Back to Customization

Save

7. SignNow Admin Tools > Custom Links:

Follow the on-screen instructions to generate a custom action link. Then click the Copy Link button. Go to Setup > Object Manager > select the Object > in the left panel, select the Buttons, Links and Actions menu and click the New Button or Link button to start creating a custom button. Paste the custom action link URL, save your custom button, and place it on the object layouts as needed.

SignNow Admin To...

SignNow Admin Tools

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signNow

Templates

Document Flows

Custom Links

Document Storage

M

makovska.maria@pdfill...

2. Select what should be sent for signature

For each custom button that opens SignNow, you need to select the type of item to send (e.g., a SignNow template or a Salesforce file). You can also choose the SignNow Document Flow to streamline the process for the sender. These settings will be added as parameters to the custom button URL.

☐ SignNow template: pre-selected by the Admin

☒ SignNow template: selected by the sender

☐ File: from the list of files attached to a Salesforce record

3. Add the SignNow Document Flow

Lowes PoC

4. Add the SignNow Document Flow URL to your custom button *

To complete your custom button setup, add the following URL to your custom button. Ensure the URL includes the object name. Enter the object name below (e.g., Account). The URL will be automatically updated.

Case

/apex/cuda_signnow__universal_signnow?contextId={!CASESAFEID(Case.Id)}&document_flow_id=13&mode=template&initialDirectory=/Case/{!CASESAFEID(Case.Id)}&contextTable=Case&app_path=/en/sender

Copy link

Note: after the package installation, you will notice the “Send with SignNow” button created for the Contact object. It will not be added to any layouts. Please do not use this button yet, its logic will be improved in the next release in January.