

Activating your Lumin Sign for Salesforce trial

1. Installing the app
2. Activating the API Integration
3. Configuring the webhook

How do I activate my Lumin Sign for Salesforce Trial?

This guide provides the simple steps to start your 14-day free trial of Lumin Sign for Salesforce, including manually installing the app and activating your Lumin Sign licenses.

Installing the app

Step 1

As a Salesforce Admin, log in to your Salesforce account.

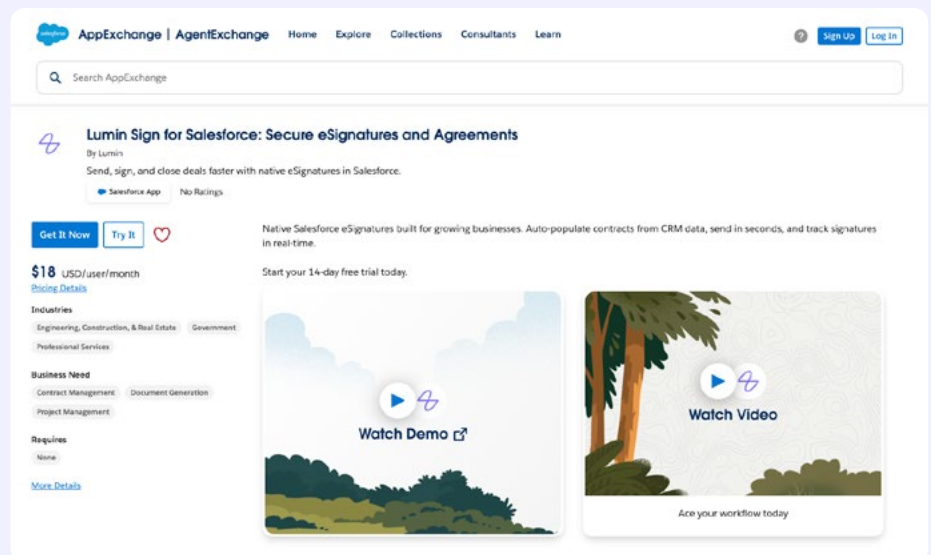
Step 2

In the Salesforce App Exchange, search for 'Lumin Sign'.

Step 3

Click **Get it now** to complete the installation.

- a. To trial Lumin Sign, select **Try it** (This requires a Salesforce Sandbox account).



Installing the app

Step 4

Log in to your Salesforce account to start the installation.

Step 5

Choose your installation preference:

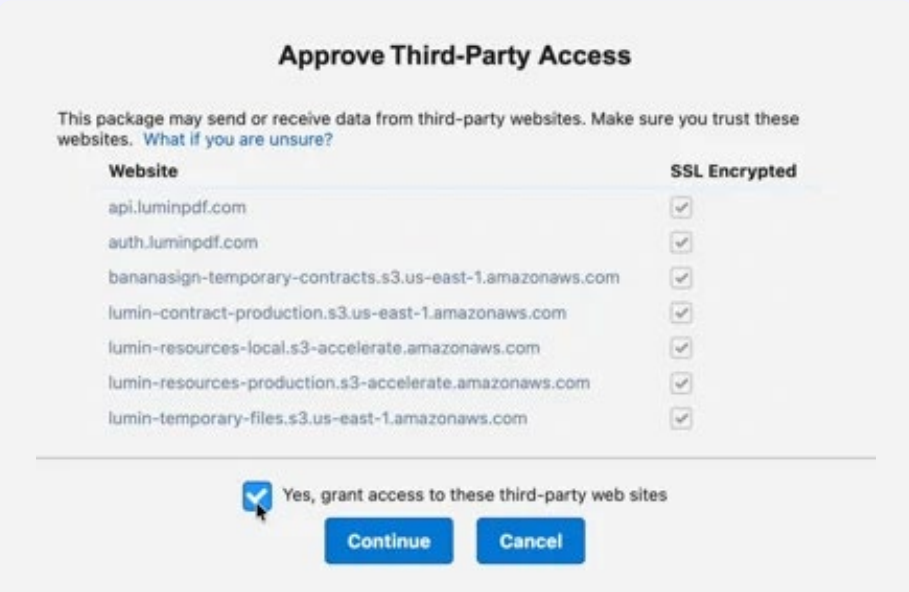
- **Install for Admins Only**
- **Install for All Users**
- **Install for Specific Profiles**

Step 6

Then, click **Install**.

Step 7

When prompted, check the box to **Grant access to Lumin** (required for data syncing) and click **Continue**.



Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
api.luminpdf.com	☒
auth.luminpdf.com	☒
bananasign-temporary-contracts.s3.us-east-1.amazonaws.com	☒
lumin-contract-production.s3.us-east-1.amazonaws.com	☒
lumin-resources-local.s3-accelerate.amazonaws.com	☒
lumin-resources-production.s3-accelerate.amazonaws.com	☒
lumin-temporary-files.s3.us-east-1.amazonaws.com	☒

☒ Yes, grant access to these third-party web sites

Continue **Cancel**

Activating the API Integration
continued on the next page.

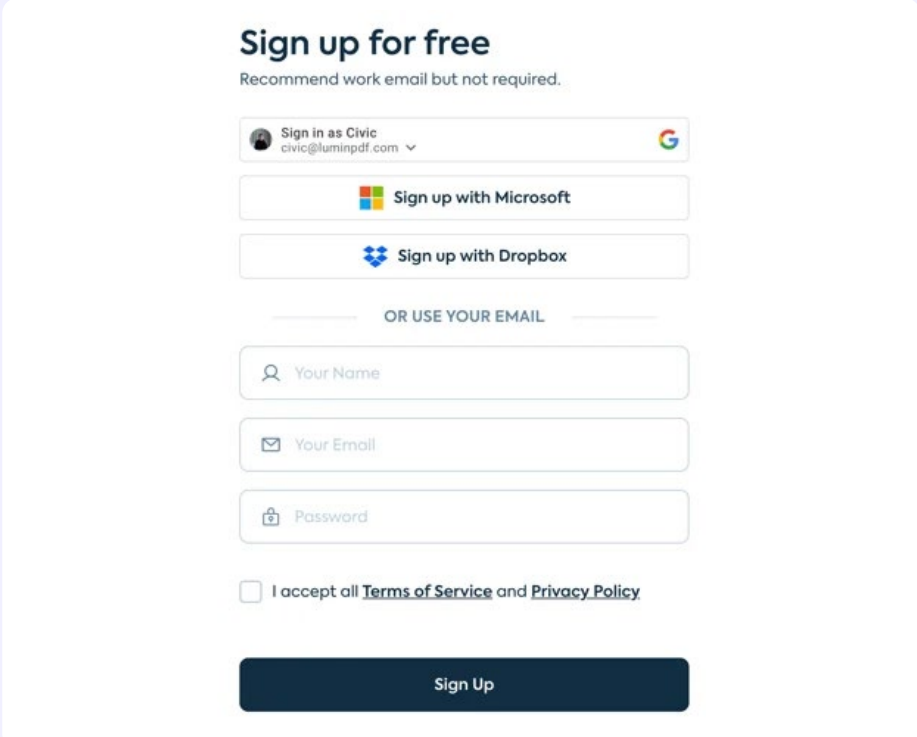
Activating the API Integration

NOTE:

If you require further support with the set-up and trial activation process, please contact assist@luminpdf.com.

Step 1

Create a Lumin account [here](#). You can use your Google or Microsoft credentials, or your email and a password.



Sign up for free
Recommend work email but not required.

Sign in as Civic
civic@luminpdf.com

Sign up with Microsoft

Sign up with Dropbox

OR USE YOUR EMAIL

Your Name

Your Email

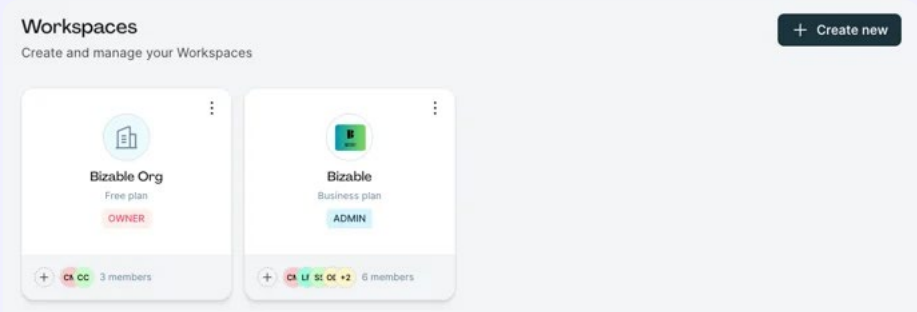
Password

☐ I accept all [Terms of Service](#) and [Privacy Policy](#)

Sign Up

Step 2

Your Salesforce account will be linked to a **Lumin Workspace**. Learn more about creating a **Lumin Workspace** [here](#).



Workspaces
Create and manage your Workspaces

+ Create new

Bizable Org
Free plan
OWNER
+ 3 members

Bizable
Business plan
ADMIN
+ 6 members

Activating the API Integration

Step 3

In Lumin, head to **Settings**, then **Billing** to upgrade your Lumin Sign account to Pro.

Step 4

Under **Subscription** and in **Action**, click **Upgrade** to purchase, add or manage Lumin Sign licenses.

Subscription

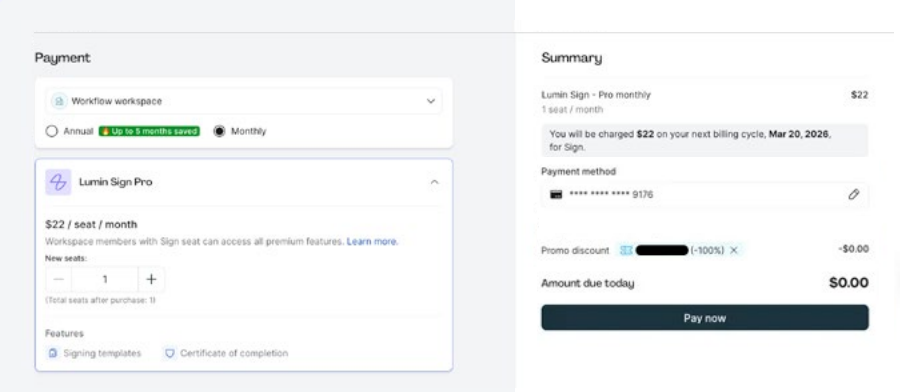
Manage and view all your subscriptions. Your next bill for \$0 will be on Jun 30, 2026.

Product	Tier	Info	Next price ⓘ	Next bill date	Action
 PDF	Pro	200 docs/month	\$0	Jun 30, 2026	Manage
 Sign	Free	5 agreements/month	-	-	Upgrade

Step 5

At the checkout:

- Select **Monthly** as the billing cycle.
- Add one seat.
- Then, add the promotion code 'SFLUMIN14'



The screenshot shows the checkout interface with two main panels: Payment and Summary.

Payment Panel:

- Workflow workspace:
- Billing cycle: ☐ Annual ☒ Up to 3 months saved ☐ Monthly
- Product: Lumin Sign Pro
- Price: \$22 / seat / month
- Workspace members with Sign seat can access all premium features. [Learn more.](#)
- New seats: (Total seats after purchase: 1)
- Features: ☒ Signing templates ☒ Certificate of completion

Summary Panel:

- Lumin Sign - Pro monthly: 1 seat / month: \$22
- You will be charged \$22 on your next billing cycle, Mar 20, 2026, for Sign.
- Payment method:
- Promo discount: (-100%) X: -\$0.00
- Amount due today: \$0.00
- [Pay now](#)

Step 6

Review the details of the upgrade in the **Summary** section.

Step 7

Finally, click **Pay now** to complete the upgrade.

Activating the API Integration

Step 8

In Salesforce, assign the appropriate permissions to the users

User Role	Required Permission Sets
Admins	Lumin Admin, Lumin Site Guest User, Lumin User
Standard Users	Lumin Site Guest User, Lumin User

Step 9

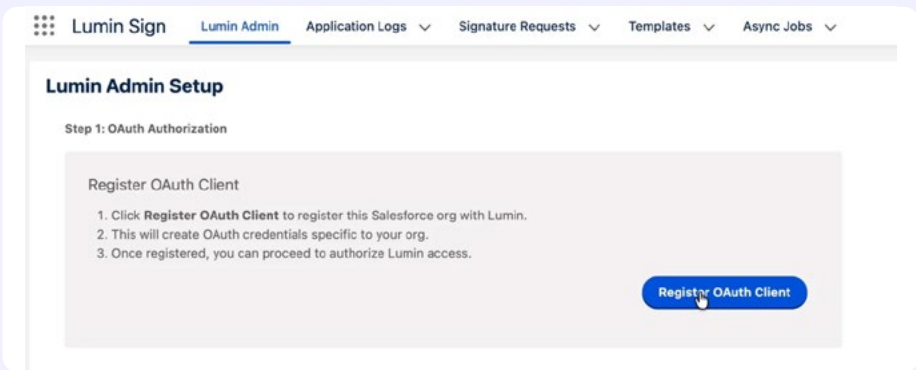
As a Salesforce Admin, from the app launcher, open the **Lumin Sign** app.

Step 10

Navigate to the **Lumin Admin** tab.

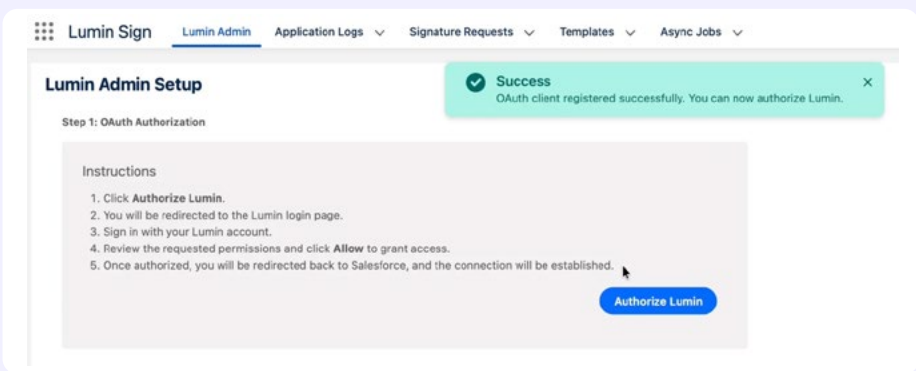
Step 11

Click **Register OAuth Client**.



Step 12

Then, select **Authorize Admin**.



Activating the API Integration

Step 13

Log in to Lumin if prompted, select the **Workspace** containing your templates.



Step 14

Then, click **Allow Access**.

Configure the webhook
continued on the next page.

Configuring the webhook

Site setup

To receive real-time updates when a document is signed, you must configure a Salesforce Site.

Step 1

In the **Lumin Admin** tab, refer to **Step 2** for the specific configuration values.

Step 2

Go to **Setup > Sites**.

Step 3

Create a new site with these details:

- **Site Label:** Lumin Webhook
- **Site Name:** (Auto-populates)
- **Active:** Check this box.
- **Active Site Home Page:** InMaintenance
- **Site Template:** SiteTemplate

Step 4

Click **Save**.

Finalize site security

Step 1

On the Site details page, click **Public Access Settings**.

Step 2

Click **Assigned Users**, then select **Lumin Webhook**.

Step 3

Go to the **Permission Set Assignments** tab and click **Edit Assignments**.

Continued on the next page →

Configuring the webhook

Step 4

Find **Lumin Site Guest User**, move it to **Enabled Permission Sets**, and click **Save**.

Link the webhook & complete registration

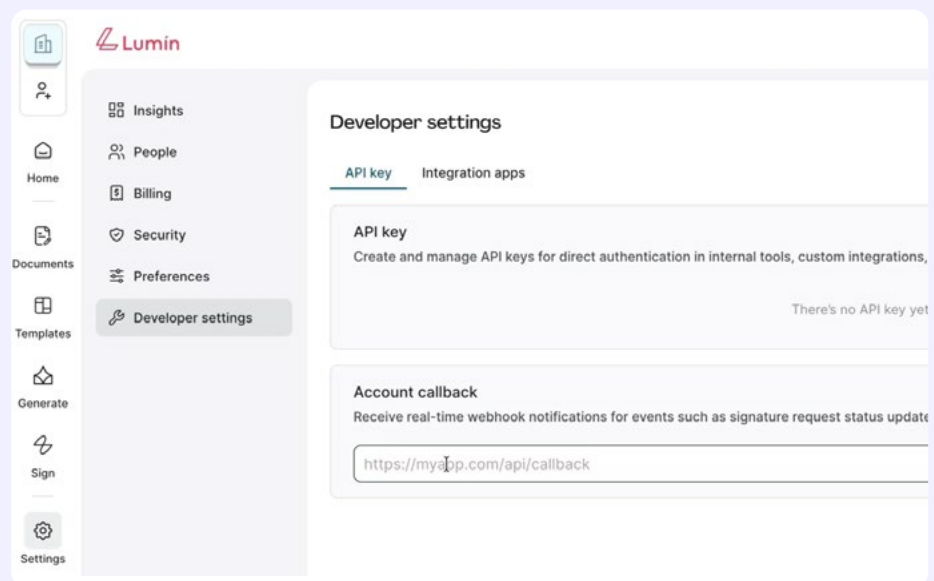
To ensure Salesforce receives real-time status updates, you must register the Webhook URL in your Lumin settings and finalize the registration in Salesforce.

Step 1

In Salesforce, go to the **Lumin Admin** tab and **Copy** the generated **Webhook URL**.

Step 2

Log in to your [Lumin account](#) and navigate to **Settings > Developer Settings**.



Step 3

Under the **Account Callback** section, paste the Webhook URL and click **Save**.

Continued on the next page →

Configuring the webhook

Step 4

Return to the **Lumin Admin** tab in Salesforce.

Step 5

Under **Step 2 (Site Settings Configuration)**, click the **Update DCR Registration** button.

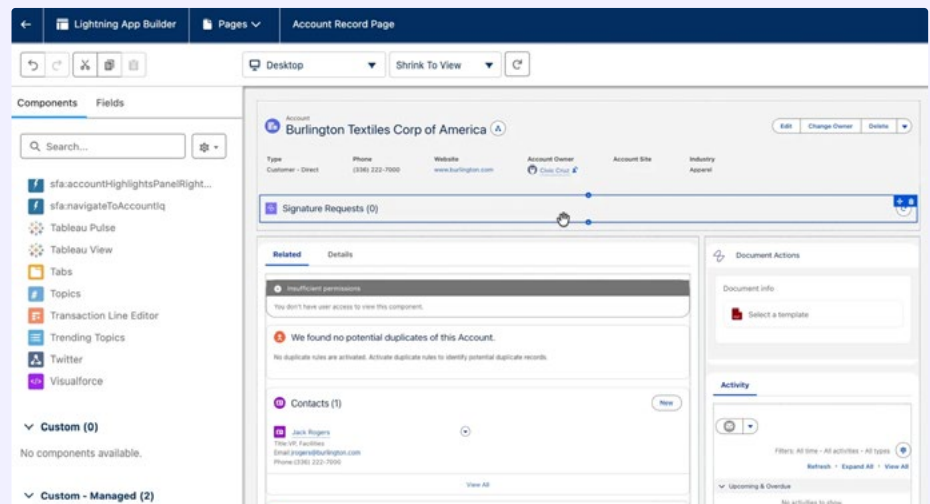
TIP:

Clicking **Update DCR Registration** synchronizes your Salesforce Site with Lumin's backend, ensuring that document status updates (like "Signed" or "Declined") flow back into your CRM automatically.

Add Components to page layouts

Finally, add the Lumin interface to your records (e.g., Accounts, Leads, or Opportunities).

- Return to the **Lumin Admin** tab in Salesforce.
- Click the **Gear Icon** in the top right and select **Edit Page**.
- From the Components list on the left, find and drag these onto your page:



- **Lumin - Document Actions**
 - **Signature Request Related List**
- Click **Save** and **Activate**.