

Mapping Lumin Templates in Salesforce

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3. Map data fields
4. Automate the workflow

How do I map Lumin Templates in Salesforce?

Connect your Lumin templates to Salesforce objects to automatically populate contracts with CRM data, eliminating manual entry and reducing document errors.

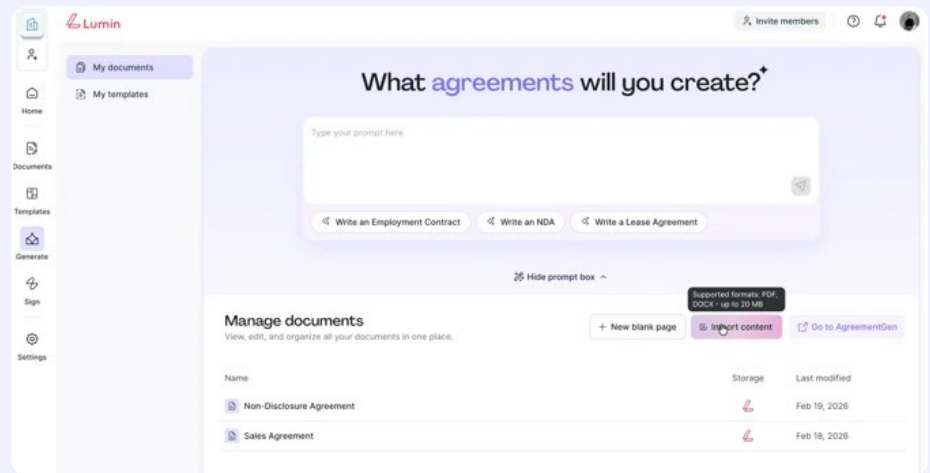
Prerequisites

- An active **Lumin Sign** Salesforce integration
- Access to **Lumin**
- Salesforce Administrator permissions (for mapping)

Prepare in Lumin – AgreementGen

Step 1

Upload your file or use the **AI prompt** to generate one.



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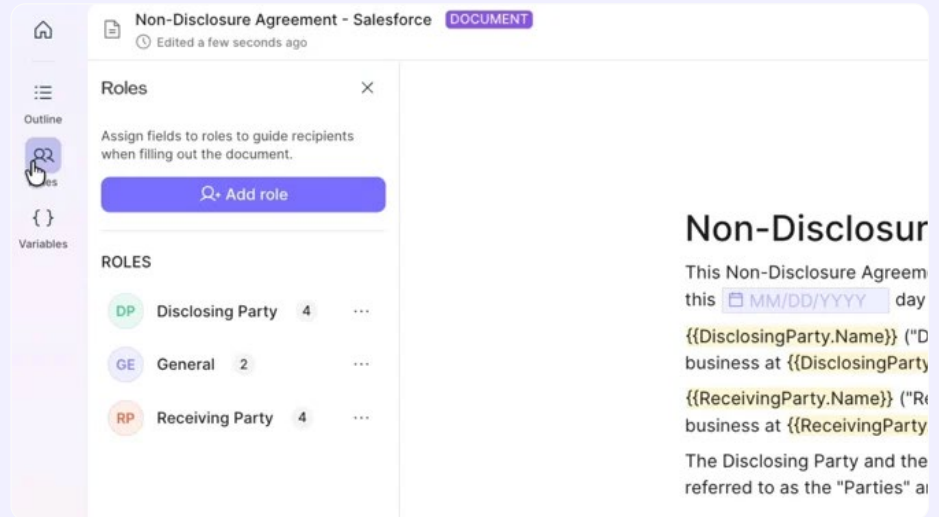
Prepare in Lumin – AgreementGen

Step 2

Use the Roles tab to add or remove signer roles.

Step 3

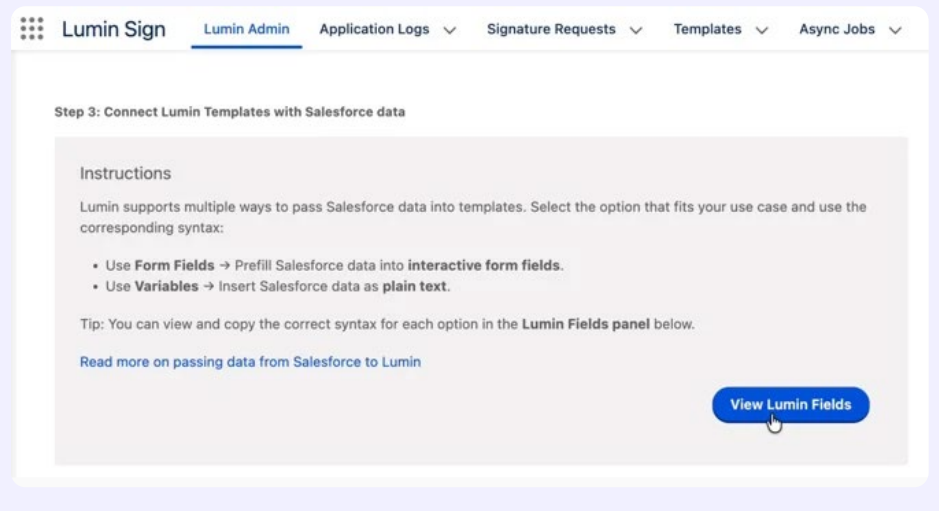
To reassign a fillable field, click the field > **Assign Role** > select the correct signer.



Step 4

Insert Variables:

- In Salesforce Lumin Admin, click View Lumin Fields.



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Prepare in Lumin – AgreementGen

- b. Copy the **Variable Name** (e.g., {{Account.Owner.Name}}). Alternatively, copy the Form Field Name Account.Name).

Select Object

Account (Account)

Search by Salesforce field name

owner

2 item(s) found

SALESFORCE FIELD	VARIABLE NAME	FORM FIELD NAME
Owner ID (OwnerId) OwnerId	{{Account.OwnerId}}	Account.OwnerId
About Me (AboutMe) AboutMe	{{Account.Owner.AboutMe}}	Account.Owner.AboutMe
Account ID (AccountId) AccountId	{{Account.Owner.AccountId}}	Account.Owner.AccountId
Address (Address) Address	{{Account.Owner.Address}}	Account.Owner.Address
Alias (Alias) Alias	{{Account.Owner.Alias}}	Account.Owner.Alias
Call Center ID (CallCenterId) CallCenterId	{{Account.Owner.CallCenterId}}	Account.Owner.CallCenterId

- c. Paste it directly into your AgreementGen text.

Non-Disclosure Agreement

This Non-Disclosure Agreement ("Agreement") is made and entered into on this

MM/DD/YYYY

 day of

T day

, by and between:

{{Account.Owner.Name}} ("Disclosing Party"), with its principal place of business at **{{Account.Owner.Address}}**, and

:: **{{ReceivingParty.Name}}** ("Receiving Party"), with its principal place of business at **{{ReceivingParty.Address}}**.

The Disclosing Party and the Receiving Party are hereinafter collectively referred to as the "Parties" and individually as a "Party."

Step 5

Save: Click the **three dots** (top right) > **Save as Template**.

Syncing to Salesforce
continued on the next page.

Sync to Salesforce

Step 1

In Salesforce, go to the **Lumin Admin** tab.

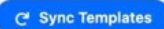
Step 2

Scroll to **Step 4** and click **Sync Templates**.

Step 4: Sync Templates

Sync external templates into Salesforce

1. Click the **Sync Templates** button to start the sync process.
2. The process may take a few minutes depending on the number of templates.
3. Status and progress will be displayed below.

 Sync Templates

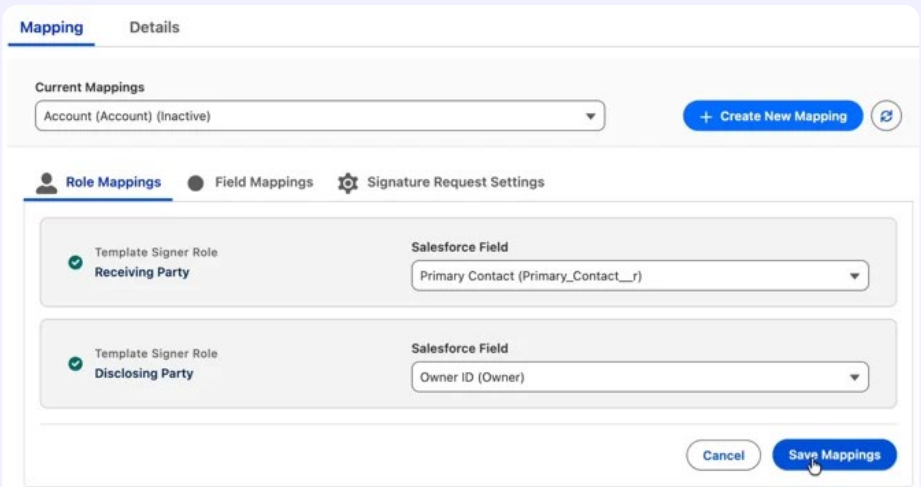
Step 3

Go to the **Templates** tab and ensure your template is toggled to **Active**.

Map data fields

Step 1

In the **Mapping** tab, link your document roles to Salesforce fields (e.g., Signer → Primary Contact).



The screenshot shows the 'Mapping' tab in Salesforce. At the top, there are two tabs: 'Mapping' (selected) and 'Details'. Below the tabs, there is a section for 'Current Mappings' with a dropdown menu showing 'Account (Account) (inactive)' and a '+ Create New Mapping' button. Below this, there are three tabs: 'Role Mappings' (selected), 'Field Mappings', and 'Signature Request Settings'. Under 'Role Mappings', there are two rows of mappings. The first row shows 'Template Signer Role Receiving Party' mapped to 'Salesforce Field Primary Contact (Primary_Contact__r)'. The second row shows 'Template Signer Role Disclosing Party' mapped to 'Salesforce Field Owner ID (Owner)'. At the bottom right, there are 'Cancel' and 'Save Mappings' buttons.

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Map data fields

Step 2

In **Field Mappings**, ensure document variables match Salesforce fields.

The screenshot shows the 'Field Mappings' section of the Lumin Sign interface. At the top, there's a navigation bar with 'Lumin Sign', 'Lumin Admin', 'Application Logs', 'Signature Requests', 'Templates', and 'Async Jobs'. Below this, a 'Current Mappings' dropdown shows 'Account (Account) (Inactive)' with a '+ Create New Mapping' button. The 'Field Mappings' tab is selected, showing a list of mappings under 'Variables (9)' and 'Form Fields (4)'. The mappings are as follows:

Document Variable	Salesforce Field
DisclosingParty.Address	Owner.Address
ReceivingParty.Address	Primary_Contact__r.MailingAddress
Account.Owner.Address	Owner.Address
DisclosingParty.Name	Owner.Name

Step 3

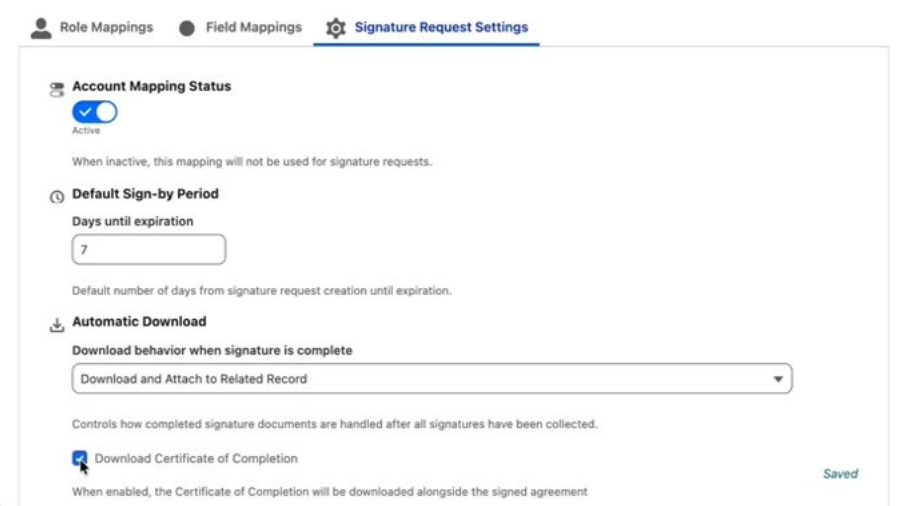
Use **Add Lookup Field** to pull data from related records (like an Owner's email).

This screenshot shows the 'Field Mappings' interface with the 'Add Lookup Field' dropdown menu open for the 'DisclosingParty.Address' variable. The dropdown lists several Salesforce fields: 'Account Description (Description)', 'Account Fax (Fax)', 'Account Name (Name)', 'Account Number (AccountNumber)', 'Account Phone (Phone)', 'Account Rating (Rating)', and 'Account Site (Site)'. The 'Add Lookup Field' option is highlighted at the top of the dropdown. The other mappings remain the same as in the previous screenshot.

Automate the workflow

In **Signature Request Settings**, configure your final automation:

1. Toggle Account Mapping to **Active**.
2. Specify the number of days until the signature request expires.
3. Check **Automatic Download** to save signed PDFs back to the Salesforce record.
4. Check **Include Certificate of Completion**.



The screenshot shows the 'Signature Request Settings' tab in a Salesforce interface. It includes three main sections: 'Account Mapping Status' with a toggle set to 'Active', 'Default Sign-by Period' with a text input for '7' days, and 'Automatic Download' with a dropdown menu set to 'Download and Attach to Related Record'. There is also a checkbox for 'Download Certificate of Completion' which is checked. A 'Saved' status is visible in the bottom right corner.

NOTE:

The signature request setting is configured for each template.

Watch the video guide [here](#).