Mapping Lumin Templates in Salesforce

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Luminsign

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.

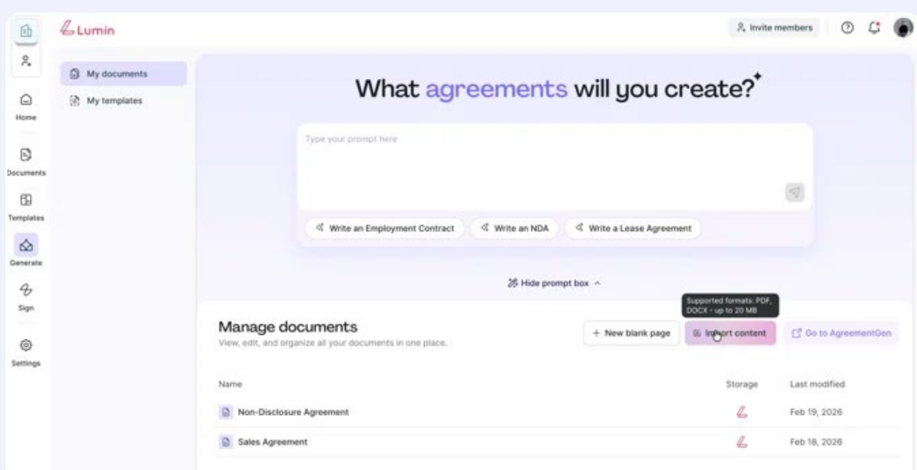
Prerequisites

- 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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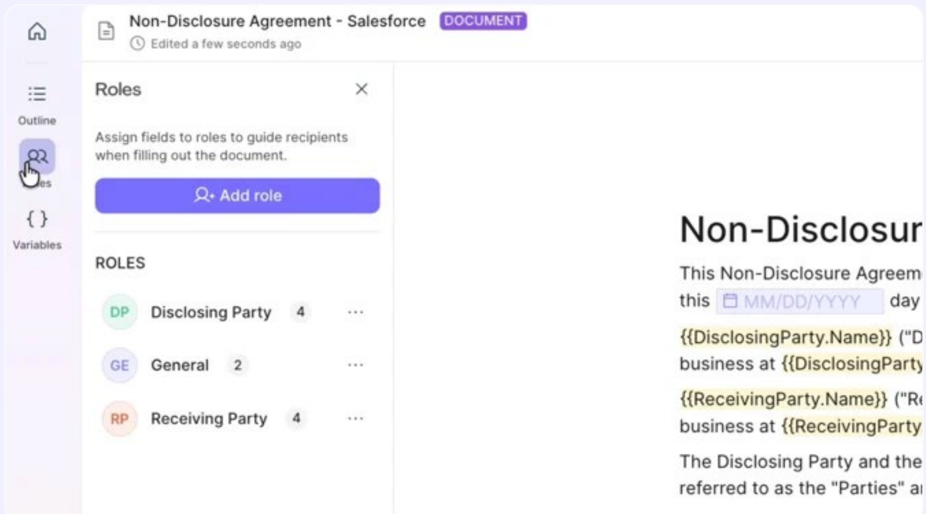
Prepare in Lumin – AgreementGen

Step 2

Use the Roles tab to add or remove signer roles.

Step 3

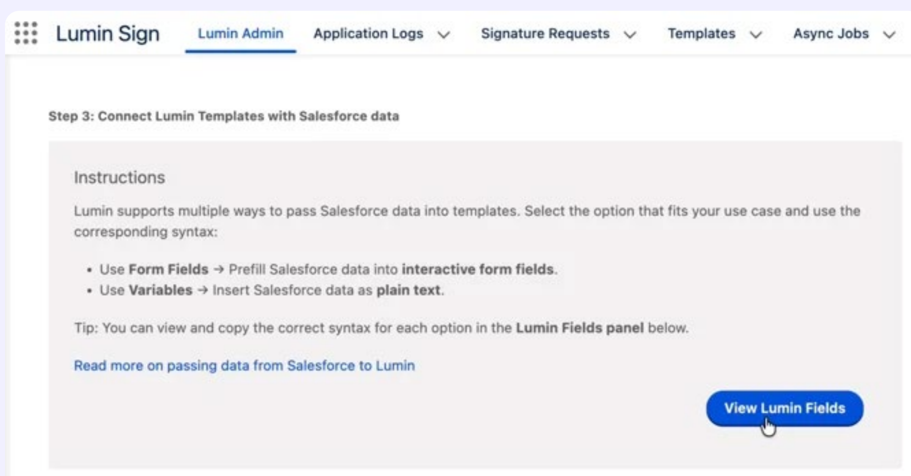
To reassign a fillable field, click the field > **Assign Role** > select the correct signer.



Step 4

Insert Variables:

a. In Salesforce Lumin Admin, click View Lumin Fields.



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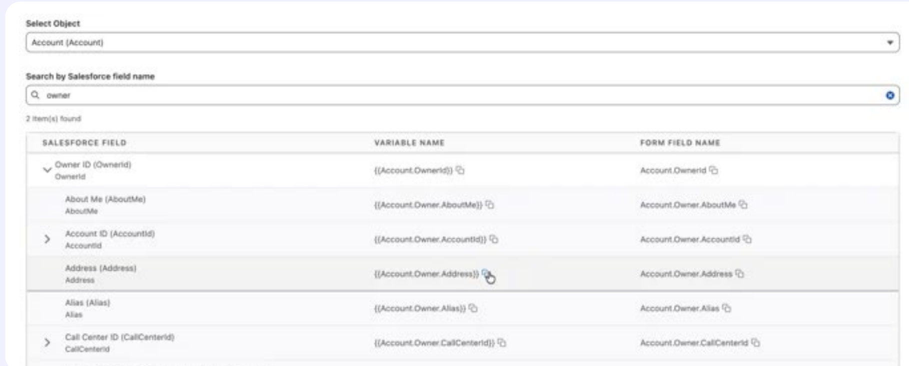
Prepare in Lumin – AgreementGen

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



c. Paste it directly into your AgreementGen text.

Step 5
Save: Click the **three dots** (top right) > **Save as Template.**

Syncing to Salesforce
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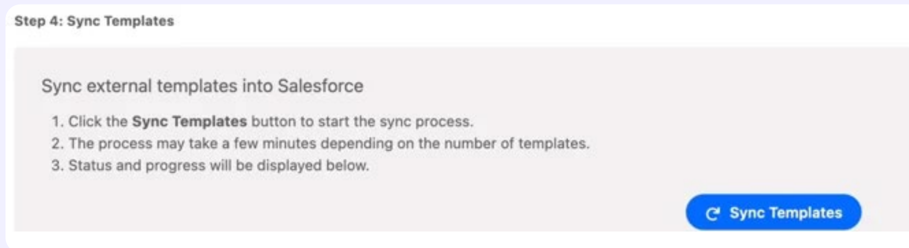
Sync to Salesforce

Step 1
In Salesforce, go to the **Lumin Admin** tab.

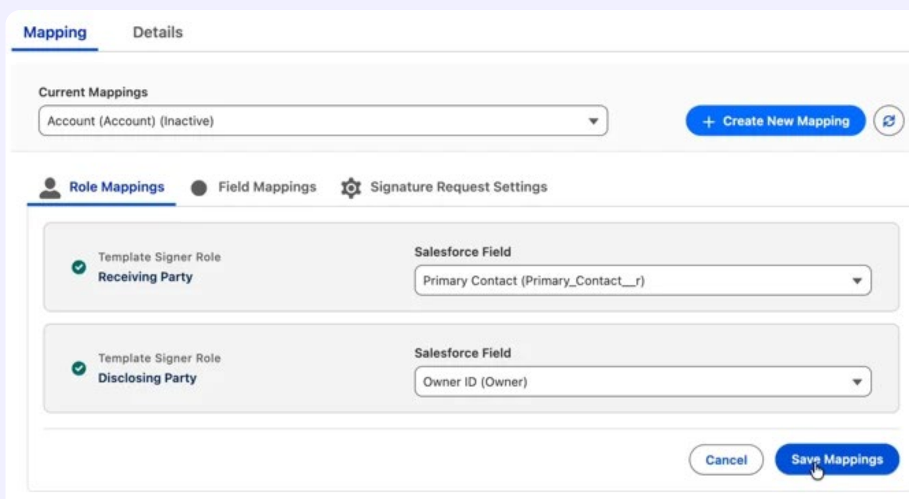
Step 2
Scroll to **Step 4** and click **Sync Templates.**



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).



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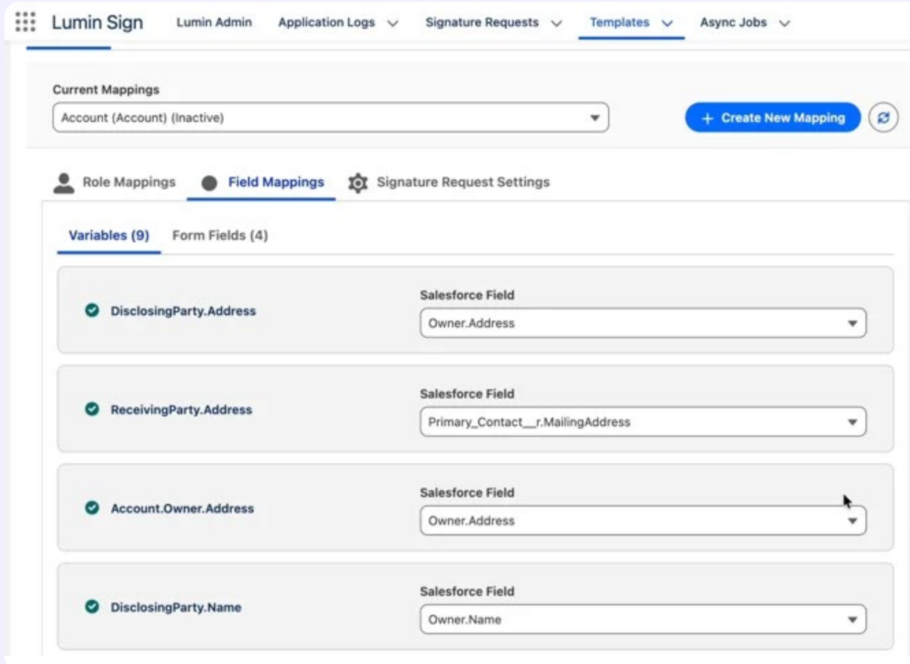
Map data fields

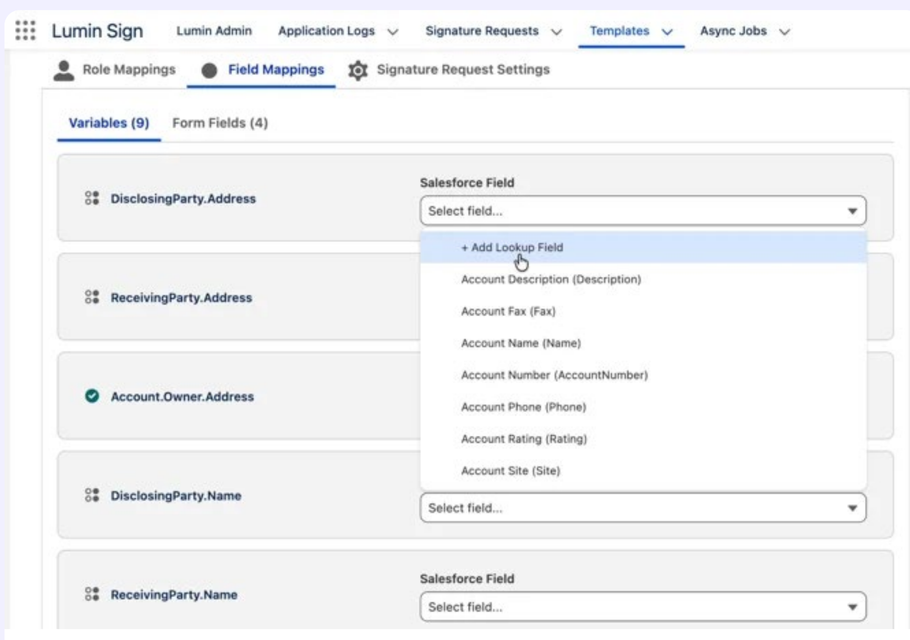
Step 2

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



Step 3

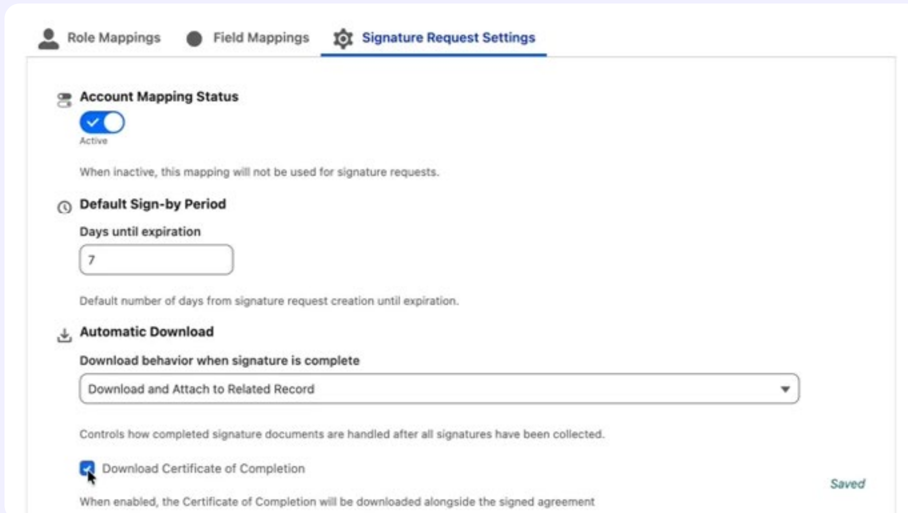
Use **Add Lookup Field** to pull data from related records (like an Owner's email).



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.**



NOTE:
The signature request setting is configured for each template.

Watch the video guide here.