



PandaDoc

PandaDoc Agentforce User Guide

Professional Integration Package

Installation & Configuration Guide

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1. Installation

Prerequisites

Before installing PandaDoc Agentforce, ensure you have:

- Salesforce org with System Administrator permissions
- PandaDoc account with API access
- PandaDoc API Key

Installation Steps

1. **Install the Package:** Click this link to install the latest version: [Install PandaDoc Agentforce v0.3.0](#)
2. **Follow the installation wizard** and install for all users
3. **Verify installation** by checking Setup → Installed Packages



Upgrade pandadoc-agentforce

By PandaDoc



An earlier version is installed. It can be upgraded while preserving the existing data.

Installed: June '25 (0.3) New Version: June '25 (0.3)



☒ **Install for Admins Only**



☐ **Install for All Users**



☐ **Install for Specific Profiles...**

 You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. 

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Upgrade

Cancel

App Name	Publisher	Version Name	Version Number
pandadoc-agentforce	PandaDoc	June '25	0.3

Additional Details

[View Components](#)

2. Admin Setup

Step 1: Enable Agentforce

1. Navigate to **Setup** → **Agentforce**
2. Enable Agentforce for your org if not already enabled
3. Ensure you have an Employee Agent configured

Step 2: Assign Permission Sets

Assign the following permission sets to users who will use PandaDoc Agentforce:

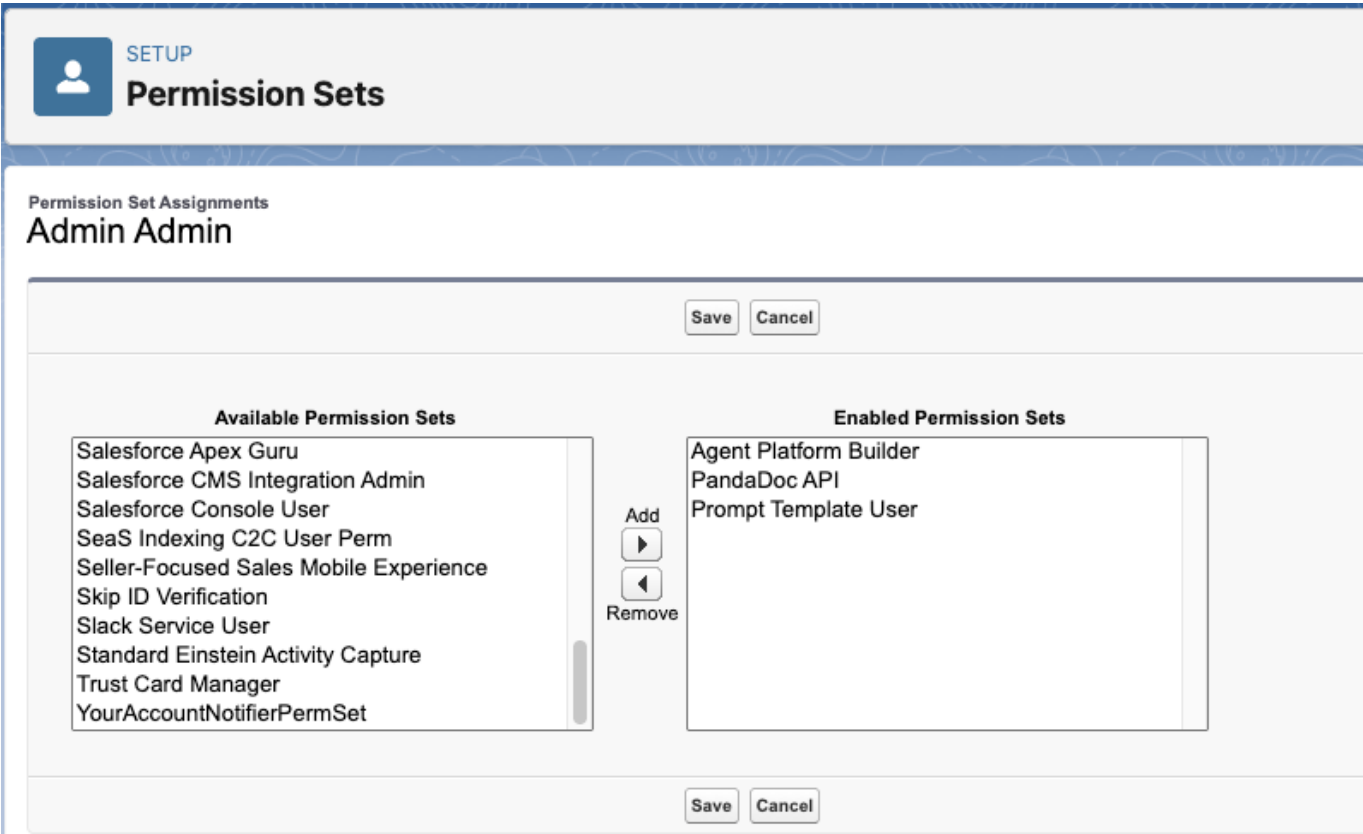
Required Permission Sets:

- **PandaDoc Agentforce User** (packaged with the app)
- **Prompt Builder User** (Salesforce standard)
- **Agentforce User** (Salesforce standard)

Assignment Steps:

1. Navigate to **Setup** → **Users** → **Permission Sets**
2. Select each permission set above
3. Click **Manage Assignments**

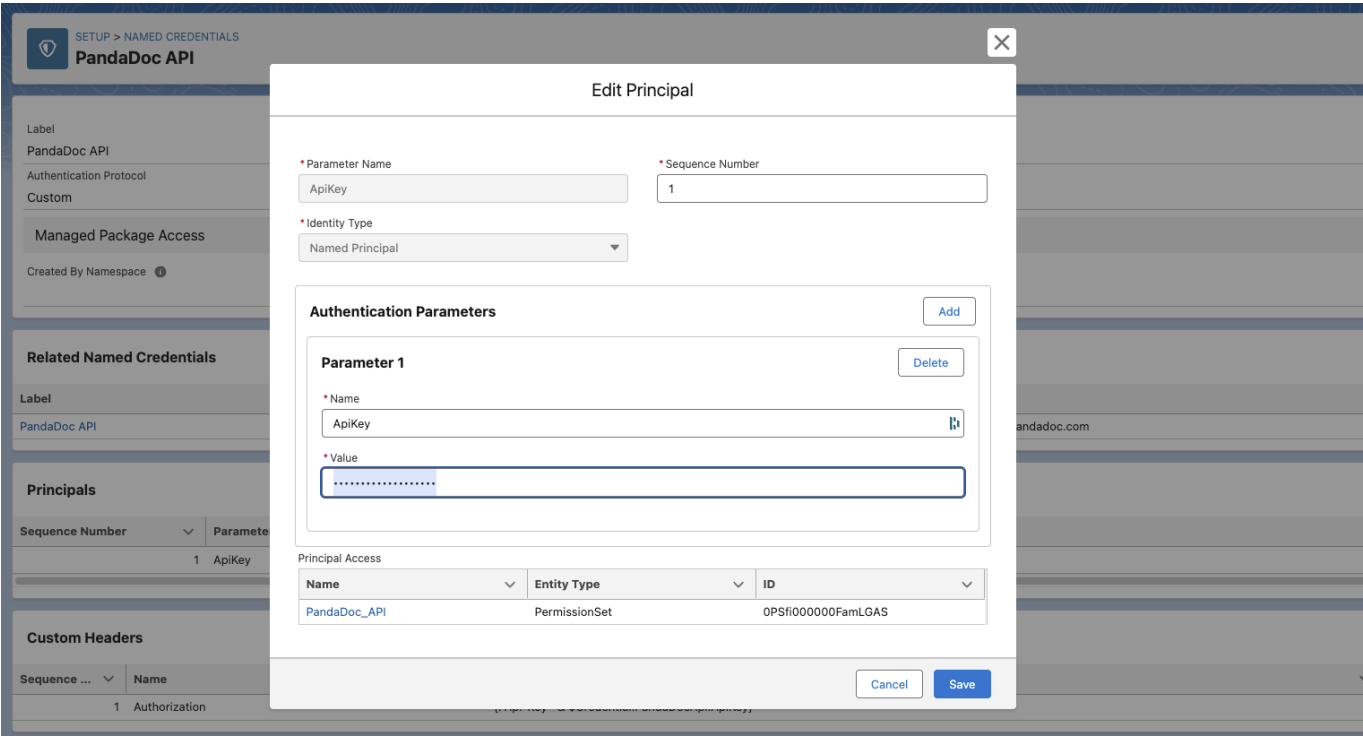
4. Add the appropriate users



Step 3: Configure PandaDoc API Access

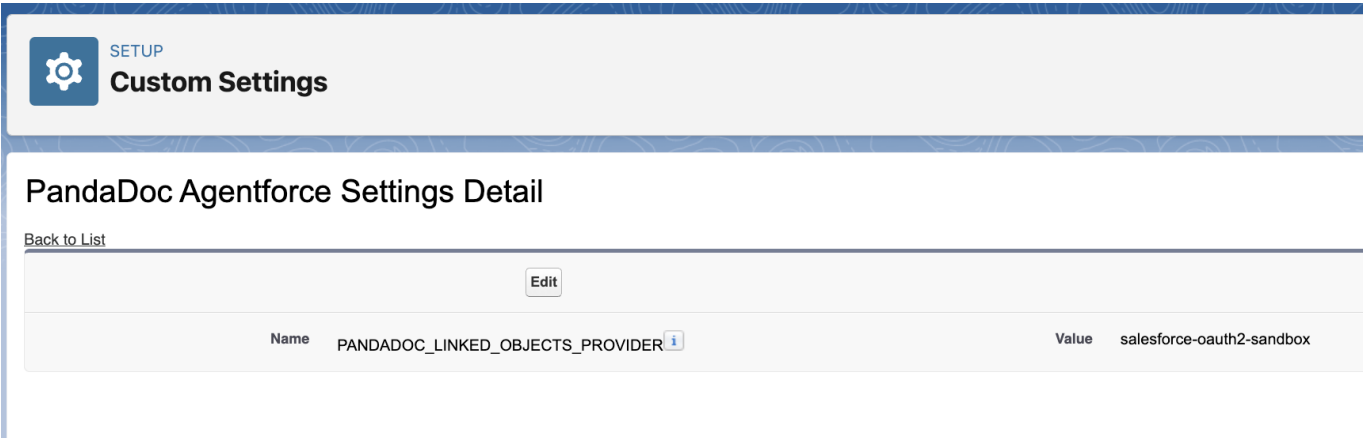
Add API Key to External Credential

- 1. Navigate to **Setup** → **Named Credentials**
- 2. Find **PandaDocApi** External Credential
- 3. Click **Edit**
- 4. Add a new **Principal** named "ApiKey"
- 5. Set the **Authentication Parameter** value to your PandaDoc API Key
- 6. Save the configuration



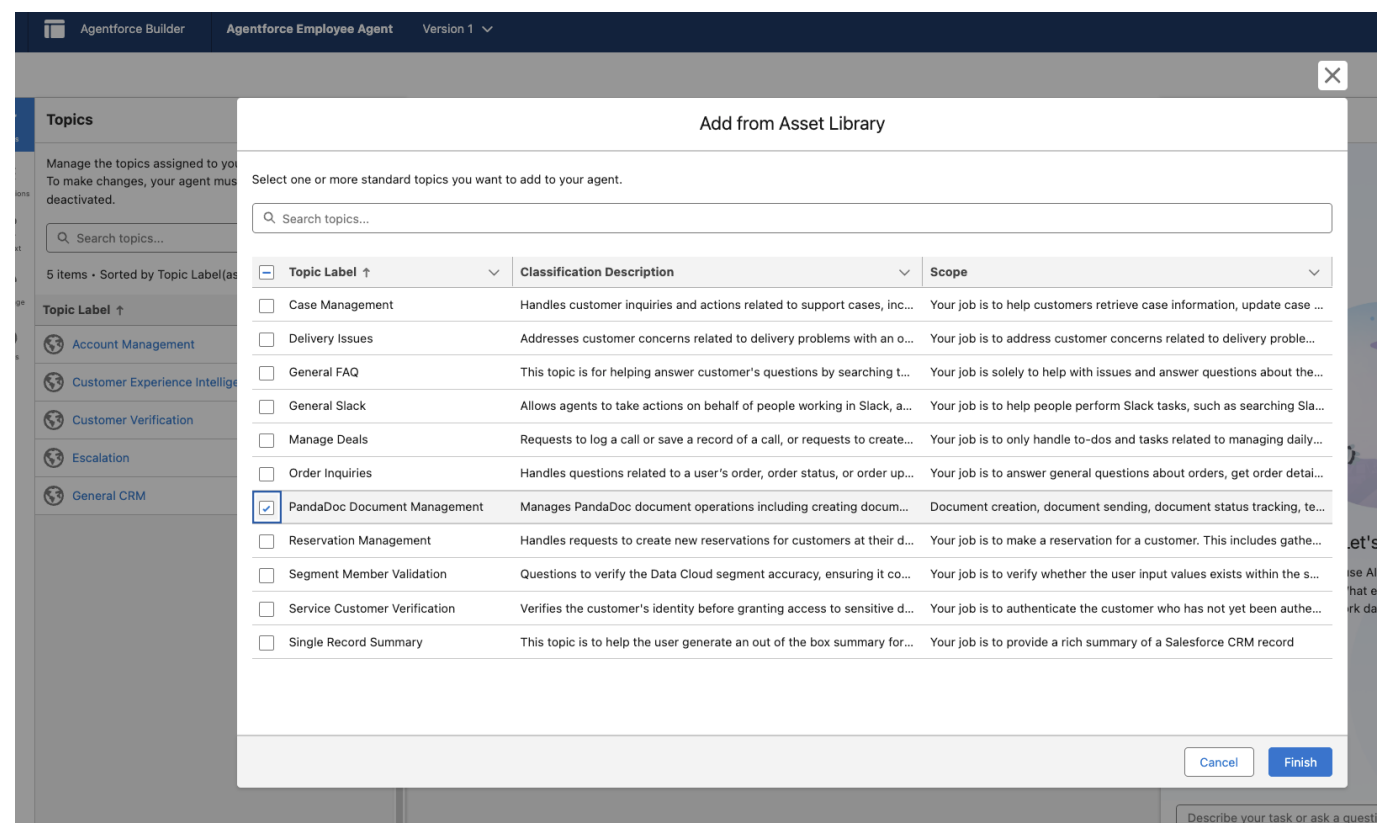
Step 4: Add Custom Settings

- 1. Navigate to **Setup** → **Custom Settings**
- 2. Select **PandaDoc Agentforce Settings** and click **Manage**
- 3. Click **New** to add a new setting entry
- 4. Enter **PANDADOC_LINKED_OBJECTS_PROVIDER** as **Name** and **salesforce** or **salesforce-oauth2-sandbox** as **Value** depending if this is a production or sandbox org.
- 5. Save the setting



Step 5: Add Topic to Employee Agent

- 1. Navigate to **Setup** → **Agent Builder**
- 2. Select your **Employee Agent**
- 3. Go to the **Topics** tab
- 4. Click **Add Topic**
- 5. Select **PandaDoc Document Management** from the available topics
- 6. **Activate** the agent with the new topic



3. User Guide

Getting Started

Once your administrator has completed the setup:

- 1. Ensure you have all required permission sets assigned
- 2. Navigate to any Salesforce page
- 3. Look for the Agentforce sidebar (usually on the right side)

How to Use PandaDoc Agentforce

Opening the Agentforce Sidebar

[Screenshot showing Agentforce sidebar location]

Interacting with PandaDoc

You can ask PandaDoc-related questions in natural language:

Sample Requests:

- "Create a contract from our standard template for Acme Corp"
- "Show me all available document templates"
- "Send the document to john@acme.com for signature"
- "What's the status of document ABC123?"
- "List all my pending documents"

[Screenshot showing conversation with agent]

Document Operations

The agent can help you with:

- Creating documents from templates
- Sending documents for signature
- Checking document status
- Managing templates
- Retrieving document details

[Screenshot showing document creation response]

4. Troubleshooting

Common Issues

Issue: "I can't see PandaDoc options in Agentforce" **Solution:** Check that you have all required permission sets assigned and the PandaDoc topic is added to your Employee Agent

Issue: "API authentication errors" **Solution:** Verify the API key is correctly configured in the External Credential and you have the "PandaDoc API Access" permission set

Issue: "Agent doesn't understand PandaDoc requests" **Solution:** Ensure the PandaDoc Document Management topic is active in your Employee Agent

Getting Help

For additional support:

- Contact your Salesforce administrator
 - Check PandaDoc documentation at app.pandadoc.com
 - Contact Aquiva Labs support
-

5. Version Information

Attribute	Value
Package Version	0.3.0
Last Updated	June 2025
Namespace	panda_doc
Compatibility	Salesforce Spring '25+
Support Level	Professional

Document Information

PandaDoc Agentforce Integration Guide

Professional Integration Package

Published by: Aquiva Labs

Version: 0.3.0

Date: June 2025

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