

**Admin Guide  
for  
Scrive Salesforce Package**

**Scrive.**

V0.13 06.03.2024



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# 1. Introduction

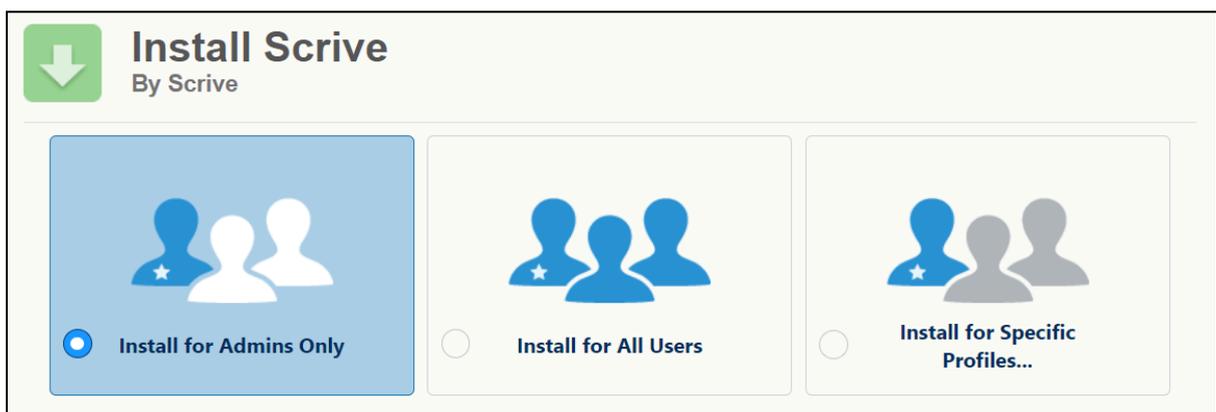
This document presents the detailed configuration of the Scrive Application in Salesforce - the application used for Salesforce integration with Scrive e-sign service.

## 2. Package Installation

The Scrive Application is installed from the AppExchange at

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000H8WodUAF>

For the best user experience, **“Install for Admins Only” option should be used during the installation process.** Access for non-admin users will be distributed by Scrive User, Scrive Admin and Scrive Viewer permissions through “Scrive Admin Panel” (details: [Users](#)).

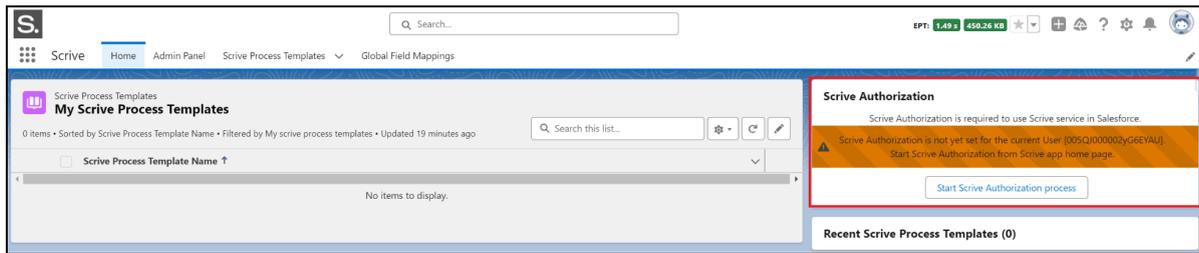


Actions on the install: the installer (user) will get the “Scrive Admin” permission set required for Scrive Company Account Configuration, Users Management and Global Field Mappings management. Additionally, an initial set of default Global Field Mappings will be created.

**Best Practice:** Right after the package is installed on Production, it’s worth executing the manual step from the [Callback setup](#) section to ensure automatic refreshment of the documents. Callback is not supported on the sandbox environment, so this step can be skipped on sandboxes.

## 3. Scrive Authorization

The user with *Scrive User* and/or *Scrive Admin* permissions is able to go through the Scrive Authorization process that is available from the component on a Scrive Home page. Without going through the Scrive Authorization process the communication through Scrive API is not possible, so Scrive service actions from Salesforce will not be available.



*Note:* Scrive Admin (even if Scrive User permission is not assigned to this Salesforce user) has to go through the Scrive Authorization process before any action on:

- [Users](#) management panel,
- [Main File](#) when setting Source Category as a *Scrive Template* on a Scrive Process Template record,
- [Global Field Mappings](#) tab.

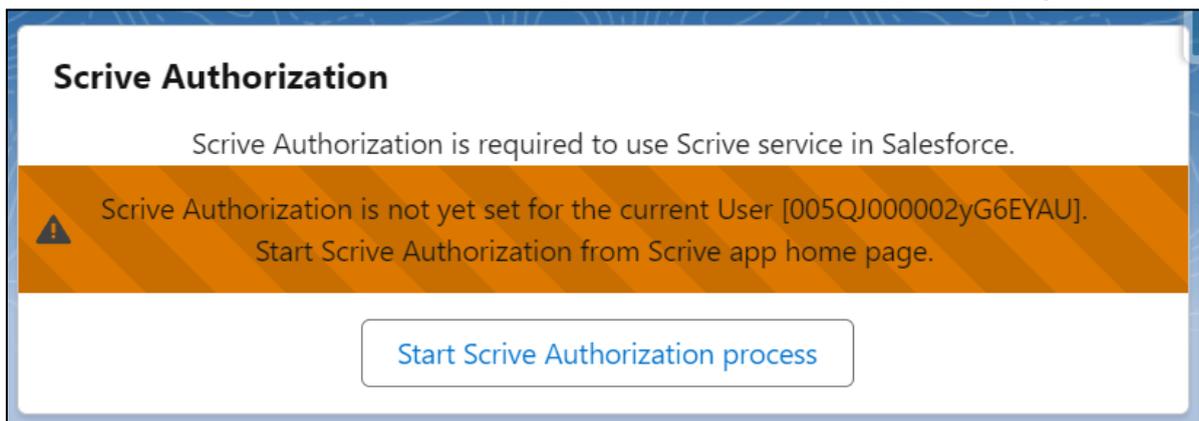
*Note2:* Scrive User has to go through the Scrive Authorization process before any action that requires communication with Scrive API on Scrive Document records.

When Scrive Authorization is not set for the current User, warning message will be printed as a toast message on a Document record page, Admin Panel tab and on any attempt to do an action that requires communication with Scrive API:

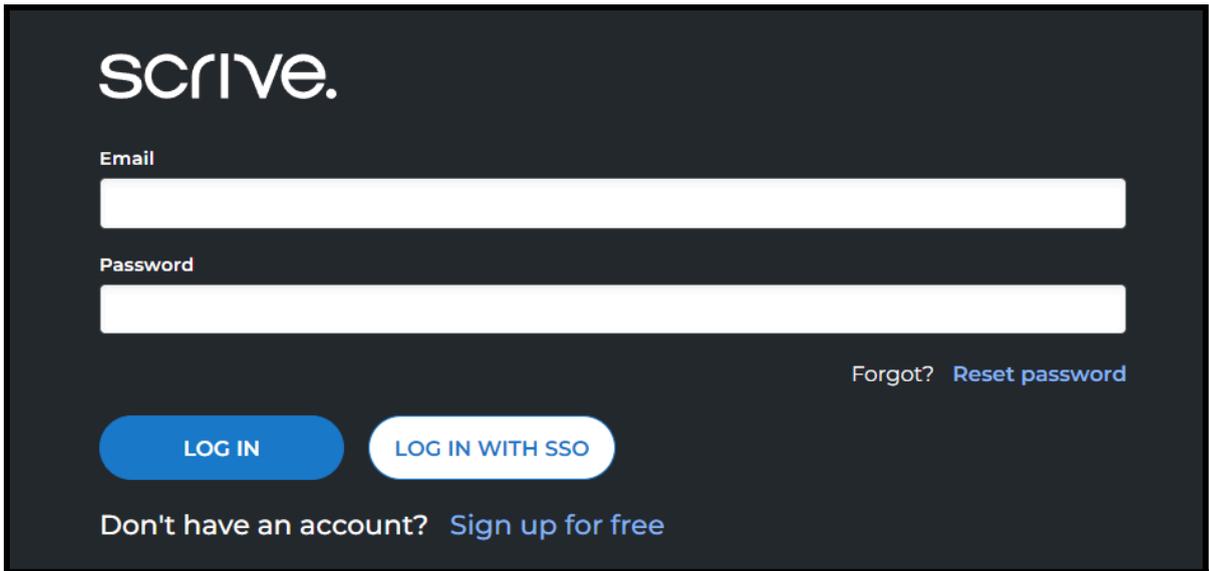


### 3.1 Scrive Authorization flow

1. Click on “Start Scrive Authorization process” on the Scrive app Home page.

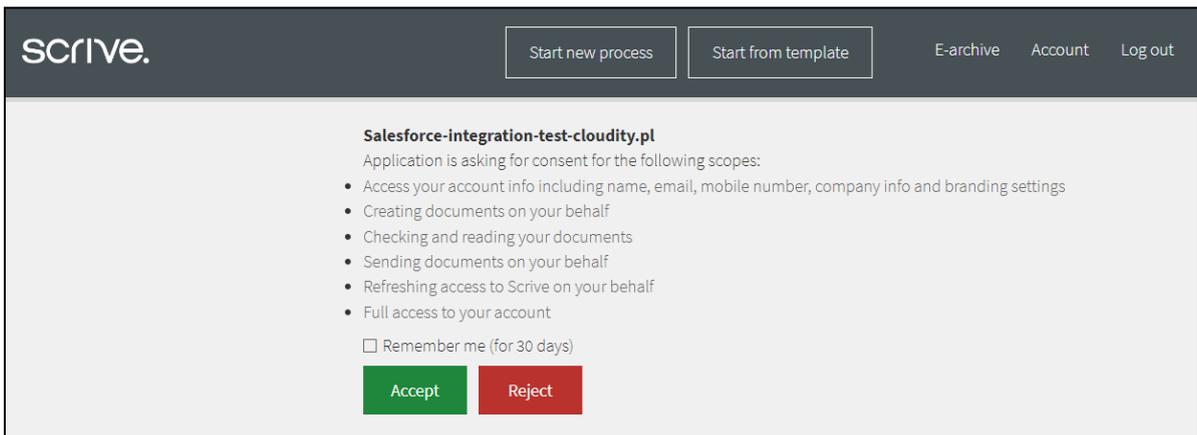


2. Redirect to scrive.com login page (if user is already logged into scrive.com, login page might be skipped).



The image shows the Scrive login page. At the top left is the Scrive logo. Below it are two input fields: 'Email' and 'Password'. To the right of the password field is a link for 'Forgot? Reset password'. At the bottom, there are two buttons: 'LOG IN' and 'LOG IN WITH SSO'. Below the buttons is a link: 'Don't have an account? Sign up for free'.

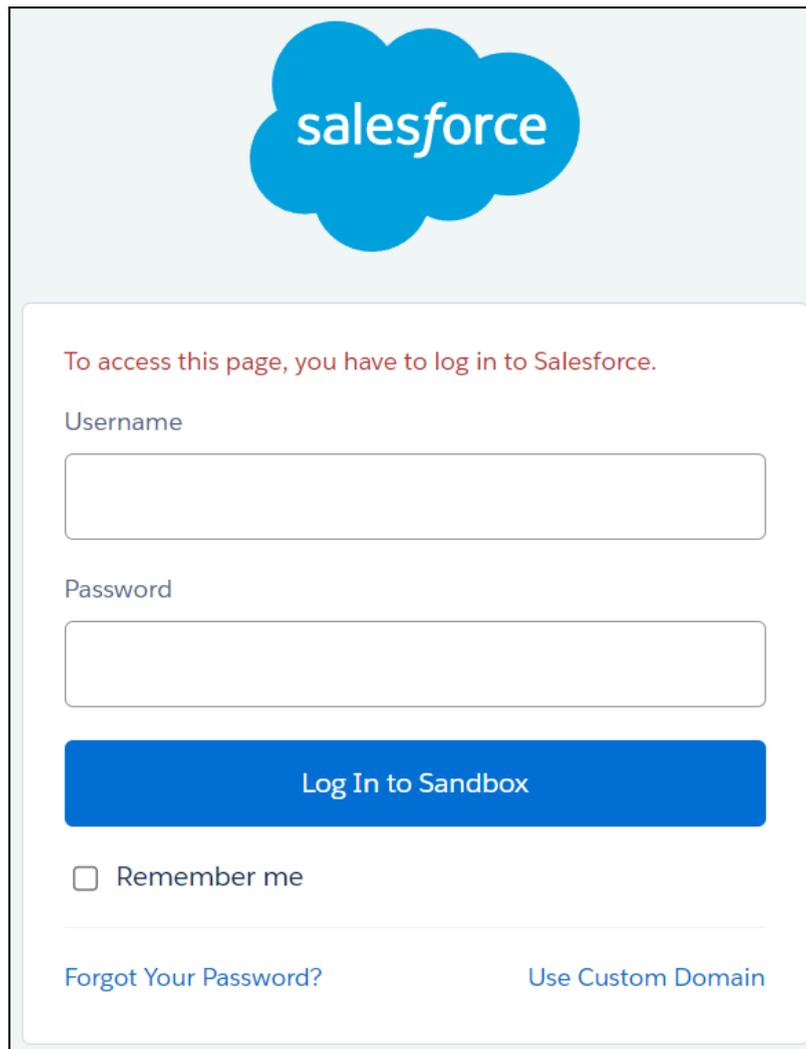
3. After successful login into scrive.com, the user will be redirected to consent page



The image shows the Scrive consent page. At the top left is the Scrive logo. To the right of the logo are three buttons: 'Start new process', 'Start from template', 'E-archive', 'Account', and 'Log out'. Below the buttons is a section titled 'Salesforce-integration-test-cloudity.pl'. Underneath the title is the text 'Application is asking for consent for the following scopes:'. Below this text is a list of six scopes: 'Access your account info including name, email, mobile number, company info and branding settings', 'Creating documents on your behalf', 'Checking and reading your documents', 'Sending documents on your behalf', 'Refreshing access to Scrive on your behalf', and 'Full access to your account'. Below the list is a checkbox labeled 'Remember me (for 30 days)'. At the bottom of the consent section are two buttons: 'Accept' and 'Reject'.

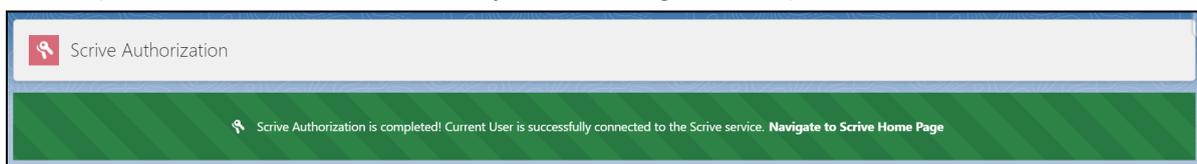
4. After acceptance, user will be redirected to Salesforce login page (login.salesforce.com or test.salesforce.com depending on is SF instance is Production or Sandbox)

*Note:* Salesforce login URL contains URL parameters required to complete the Scrive Authorization process.



The image shows a Salesforce login interface. At the top, there is a blue cloud logo with the word "salesforce" in white. Below the logo, a message in red text reads: "To access this page, you have to log in to Salesforce." Underneath this message are two input fields: "Username" and "Password". Below the "Password" field is a blue button labeled "Log In to Sandbox". Under the button is a checkbox labeled "Remember me". At the bottom of the form, there are two links: "Forgot Your Password?" on the left and "Use Custom Domain" on the right.

- a. "Use Custom Domain" can be used to adjust the login page to the Custom Domain of the desired Salesforce instance without losing URL parameters required to complete the Scrive Authorization process.
5. After successful login into Salesforce, the Scrive Authorization is processed and the process is finished successfully, the message will be printed on the screen.



6. The Scrive Authorization component on a Scrive app Home page will not contain any warning message, but still Scrive Authorization can be repeated (in case of token expiration or any other trouble during communication with Scrive API).

## Scrive Authorization

Scrive Authorization is required to use Scrive service in Salesforce.

[Start Scrive Authorization process](#)

### 3.2 Scrive Email Validation during Scrive Authorization process

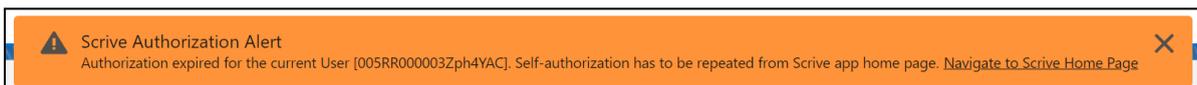
During the final step of [Scrive Authorization flow](#) the validation checks the consistency of email address of authorized Scrive Account and [Scrive Email on the Salesforce user](#).

*Note:* Scrive Email of the Salesforce user can be checked in [Users](#) panel or directly on User record - it's a value from Scrive Email (ScriveSf\_\_ScriveEmail\_\_c) field if it's not blank or the value of standard Salesforce Email field.

### 3.3 Troubleshooting

- Any problem with Scrive API communication:
  - ◆ Repeat [Scrive Authorization flow](#) from Scrive app Home page.

- *Error:* Scrive Authorization expired for the current User



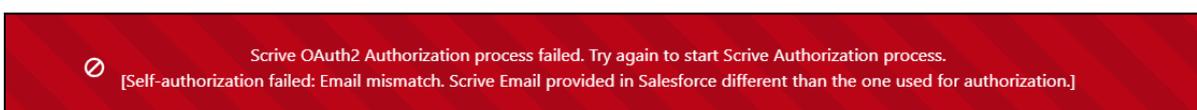
- ◆ Repeat [Scrive Authorization flow](#) from Scrive app Home page.

- *Error:* Scrive Authorization is not yet set for the current User



- ◆ Execute/repeat [Scrive Authorization flow](#) from Scrive app Home page.

- *Error:* Email mismatch, Scrive Email provided in Salesforce different than the one used for authorization



- ◆ Ensure that the Scrive Account used during [Scrive Authorization flow](#) is consistent with the [Scrive Email](#) set for the current Salesforce user.

→ *Error:* Scrive OAuth2 Authorization process failed. Try again to start Scrive Authorization process.

- ◆ Repeat [Scrive Authorization flow](#) from Scrive app Home page.
- ◆ Ensure that the [Scrive Authorization flow](#) process is not lasting longer than 2 minutes, as the authorization is based on a short-living authorization code.
- ◆ Ensure that while logging back to Salesforce the URL parameters are not lost (point 4. from [Scrive Authorization flow](#)).

→ *Error:* issue with login to SF after accepting consent

- ◆ Ensure that the [Scrive Authorization flow](#) process is not lasting longer than 2 minutes, as the authorization is based on a short-living authorization code.
- ◆ Ensure that while logging back to Salesforce the URL parameters are not lost (point 4. from [Scrive Authorization flow](#)).
- ◆ Use Custom Domain option while login to redirect to desired domain without losing URL parameters required to complete the process (point 4. from [Scrive Authorization flow](#)).

→ *Error:* Scrive Authorization flow on Digital Experience page

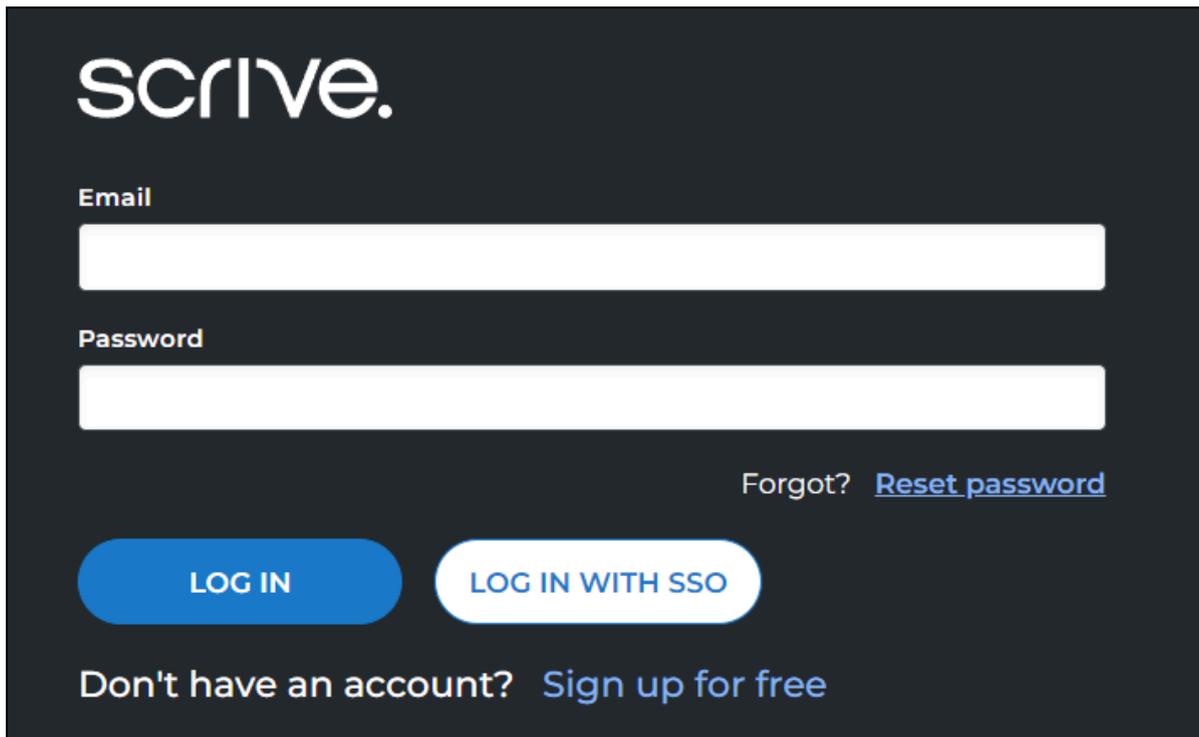
- ◆ Currently it has not yet been supported, but it's on a road map, so can be expected soon.

→ *Error:* Scrive Authorization flow with Identity Provider in Salesforce

- ◆ Use Custom Domain option while login to redirect to desired domain without losing URL parameters required to complete the process (point 4. from [Scrive Authorization flow](#)).

→ *Error:* how to get credentials to Scrive Account

- ◆ New users should get an invitation email and the password will be set during the process.
- ◆ If the password is unknown or forgotten, the 'Reset password' action on a [Scrive login page](#) can be used to restore it.

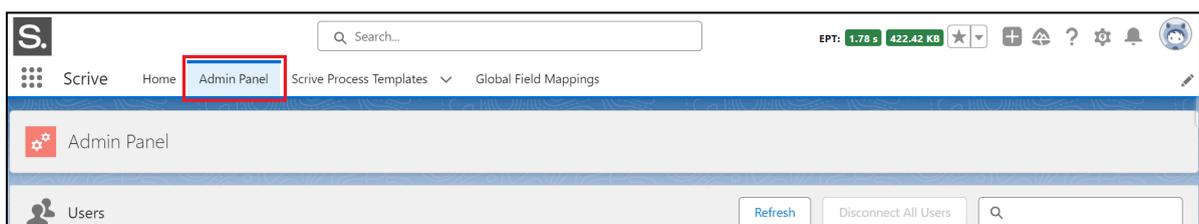


## 4. Package configuration - Admin Panel

Admin Panel in Scrive Application contains 2 main sections:

- [Users](#),
- [Scrive Settings](#).

Scrive Administrator may find useful graphs in the Admin Panel, which are described in the section [Scrive Admin Panel - Reports](#)



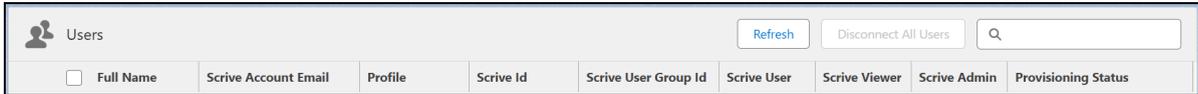
### 4.1 Users

Users component is used for User Management. It contains the list of users that may use Scrive Application with Scrive User, Scrive Admin and Scrive Viewer editable columns.

Using this component Scrive Admin is able to:

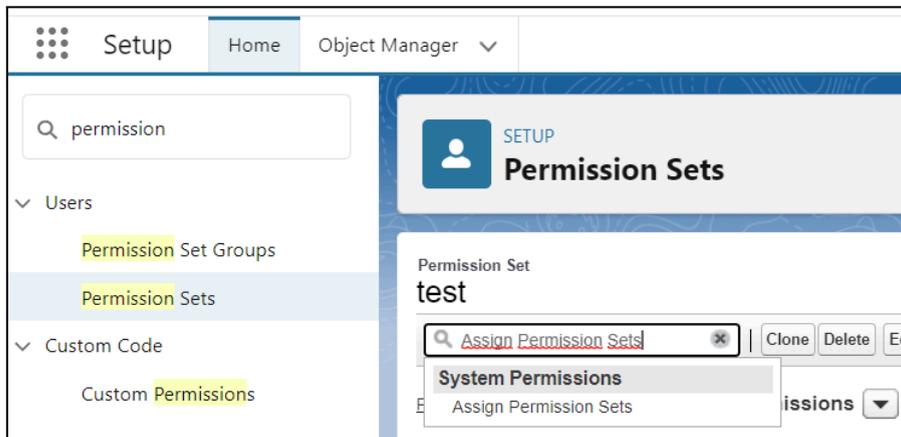
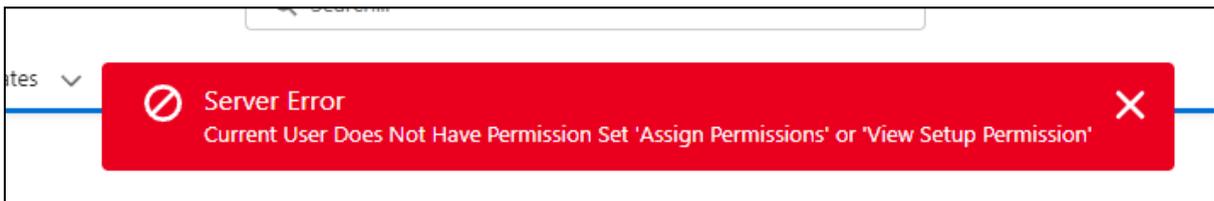
- Assign/remove *Scrive Admin* permissions for specific users,
- Assign/remove *Scrive User* permissions for specific users,
- Assign/remove *Scrive Viewer* permissions for specific users,
- Filter users,

- Check the provisioning status for the user (if a Scrive account is created under registered Company and review the potential error message),
- Disconnect All Users.



**Note:** Assigning users directly to “Scrive User”, “Scrive Viewer” and “Scrive Admin” Permission Sets in the Setup (Setup -> Permission Sets) should be avoided. Scrive “User”, “Viewer” and “Admin” permission sets will be assigned in the background automatically based on values of “Scrive User”, “Scrive Viewer” and “Scrive Admin” checkboxes from the Users panel.

**Note2:** To manage “Scrive Admin/User/Viewer” checkboxes in the Users panel, the user requires “Assign Permission Sets” System Permission added in the separate profile of permission set (this permission allows assignment of all permission sets, not only permission sets from the Scrive package). Without this permission, the exception regarding missing permission will be thrown on the attempt of the “Scrive Admin/User/Viewer” checkboxes management.



#### 4.1.1 Scrive Account Email on the Salesforce User

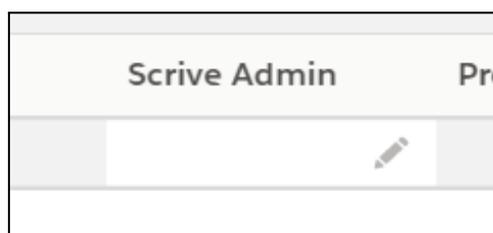
Users component has a ‘*Scrive Account Email*’ column with an email address used for User Provisioning process (creating new Scrive Account or pulling details of existing Scrive Account). The value in ‘*Scrive Account Email*’ column is based on the Scrive Email (ScriveSf\_\_ScriveEmail\_\_c) field value or standard Email field value on a User object - it’s a value from Scrive Email (ScriveSf\_\_ScriveEmail\_\_c) field, if it’s not blank, or the value of standard Salesforce Email field.

If the intention is to match a Scrive Account with an email address from a Salesforce user, no action is required. If the email address for matching has to be different, Scrive Email (ScriveSf\_\_ScriveEmail\_\_c) field has to be filled on a specific Salesforce user with desired email value before User Provisioning and Scrive Authorization for this user.

*Note:* If the Scrive Email (ScriveSf\_\_ScriveEmail\_\_c) field value is changed for a Salesforce user that is set as '[Scrive User](#)' and is already [authorised against Scrive](#) - the Salesforce user should be disconnected (e.g. unchecking 'Scrive User' in [Users](#) component) and connected once again (User Provisioning will be start for the new Scrive Account Email value). Also Scrive Authorization has to be repeated with Scrive Account related to the new Scrive Email value.

#### 4.1.2 Scrive Admin permission - management

Scrive Admin can assign the *Scrive Admin* permission (or remove the assignment) to other users from the organisation. To do that, Scrive Admin should click on the pencil icon in the 'Scrive Admin' column in the specific user row to activate the inline editing, set the checkbox to proper value (checked for assigning *Scrive Admin* permission) and click 'Save' at the bottom of the table.



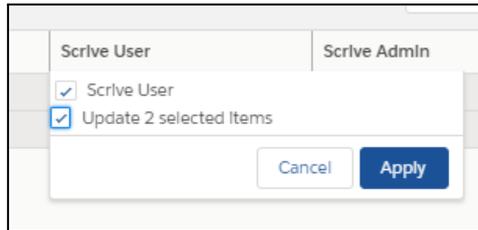
*Note:* Table supports editing multiple records by selecting multiple records on the left side of the table (it works like Salesforce standard multiple record inline editing). 'Scrive User' and 'Scrive Admin' columns might be edited at the same time (see the screenshot from [Scrive User permission - management](#) paragraph).

Scrive Admin permission is assigned immediately. User with *Scrive Admin* permission don't need to have System Administrator profile (in this case the user will see only 'Home', 'Admin Panel' and 'Global Field Mappings' tabs)

#### 4.1.3 Scrive User permission - management

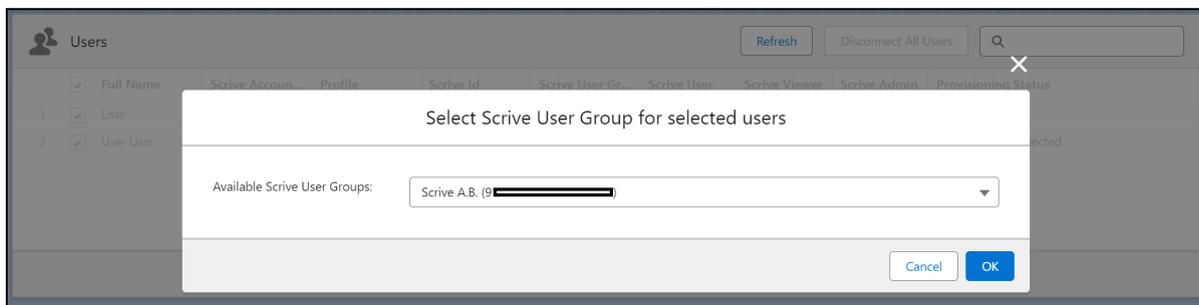
Scrive Admin can assign the *Scrive User* permission (or remove the assignment) to other users from the organisation. To do that, Scrive Admin should click on the pencil icon in the 'Scrive User' column in the specific user row to activate the inline editing, set the checkbox to proper value (checked for assigning *Scrive User* permission) and click 'Save' at the bottom of the table.

*Note:* Scrive Admin can start User Provisioning process only if successfully completed [Scrive Authorization](#) process.



*Note2:* Table supports editing multiple records by selecting multiple records on the left side of the table (it works like Salesforce standard multiple record inline editing). 'Scrive User' and 'Scrive Admin' columns might be edited at the same time.

Scrive Account authorized for the current Scrive Admin Salesforce user might support multiple Scrive User Groups, so in the next step, the desired Scrive User Group has to be selected in the popup (list of available Scrive User Groups depends on the permission on a related Scrive Account). After Scrive User Group selection, the User Provisioning process will be started.



If 'Scrive Admin' Salesforce User is not yet authorized, the list will be empty, further processing will be blocked and '*Scrive Authorization is not yet set for the current User*' will be printed on the screen.

When the Scrive User is set to true, Salesforce attempts to create a new user for the user's [Scrive Account Email](#) under selected Scrive User Group or to pull details of Scrive Account, if the Scrive Account with user's [Scrive Account Email](#) already exists under selected Scrive User Group. This attempt is executed as an asynchronous job - the user's 'Provisioning Status' will change to 'In Progress'. When the asynchronous job is done the component will refresh the table's content automatically (the "Refresh" button can be used to manually refresh the content of the table). The 'Provisioning Status' column will show the status of the operation:

- 'OK', if the result is successful - '*Scrive Id*' column will be filled with Scrive User Id and '*Scrive User Group Id*' column will be filled with Scrive User Group Id (checkbox in 'Scrive User' column will remain checked for the user).
- Error message returned by Scrive API that will help to understand the reason for failure (checkbox in 'Scrive User' column will be unchecked for the user).

Scrive User permission is assigned to the user only if creation of Scrive Account or connecting to existing Scrive Account is successful.

*Note:* Newly created Scrive Account is set as *Standard* role by default - it can be changed on scrive.com portal in “Account” -> “Users and Groups” section.

If multiple users will be processed, the process for each user will be executed in a separate asynchronous job - the whole process might take some time.

The user with Scrive User permission gains the access to ‘Scrive Documents’ and ‘Scrive Browser’ tabs.

#### 4.1.4 Scrive Viewer permission - management

Scrive Admin can assign the *Scrive Viewer* permission (or remove the assignment) to other users from the organisation. To do that, Scrive Admin should click on the pencil icon in the ‘Scrive Viewer’ column in the specific user row to activate the inline editing, set the checkbox to proper value (checked for assigning *Scrive Viewer* permission) and click ‘Save’ at the bottom of the table.

*Note:* Table supports editing multiple records by selecting multiple records on the left side of the table (it works like Salesforce standard multiple record inline editing). ‘Scrive User’, ‘Scrive Viewer’ and ‘Scrive Admin’ columns might be edited at the same time (see the screenshot from [Scrive User permission - management](#) paragraph).

Scrive Viewer permission is assigned immediately. The user with Scrive Viewer permission is able to see Scrive Documents records, but only in a read only mode and don’t have a Scrive Account connected (not able to communicate with Scrive API). The user with Scrive Viewer permission gains the access to the ‘Scrive Documents’ tab.

#### 4.1.5 Filter

Filter is placed at the right top of the Users component. To use the filter, type the searched phrase. Then users are filtered by ‘Full name’, ‘Username’ and ‘Profile’ columns.

#### 4.1.6 Disconnecting All Users

Scrive Admin may disconnect all salesforce users from Scrive service with the ‘Disconnect All Users’ button. After this action all Scrive Users will lose the ability to create and send Scrive Documents and lose the access to the ‘Scrive Documents’ and ‘Scrive Process Templates’ tabs. Scrive Authorization for all Users will be erased (including Scrive Authorization for users marked as ‘Scrive Admin’, but their ‘Scrive Admin’ permission will remain unchanged).

#### 4.1.7 Troubleshooting

- ‘Error: Scrive Authorization is not yet set for the current User’:
  - ◆ Execute/repeat [Scrive Authorization flow](#) from Scrive app Home page.
  
- ‘Error: The parameter ‘email’ is not valid.’ Provisioning Status for a user:

- ◆ The user's email address is already used for another Scrive User Account - please ask Scrive Support to assign this user to correct the Scrive Company Account or use a different email for this Salesforce user.

→ Status Provisioning is not changing from 'In progress':

- ◆ It might indicate that the asynchronous User Provisioning Job has failed in an unexpected manner. Check asynchronous job status (User Provisioning jobs have 'Apex Class' named 'UserProvisioningJob') in Salesforce Setup (Setup/Apex Jobs). "UserProvisioningJob" status might help to indicate the source of the problem.

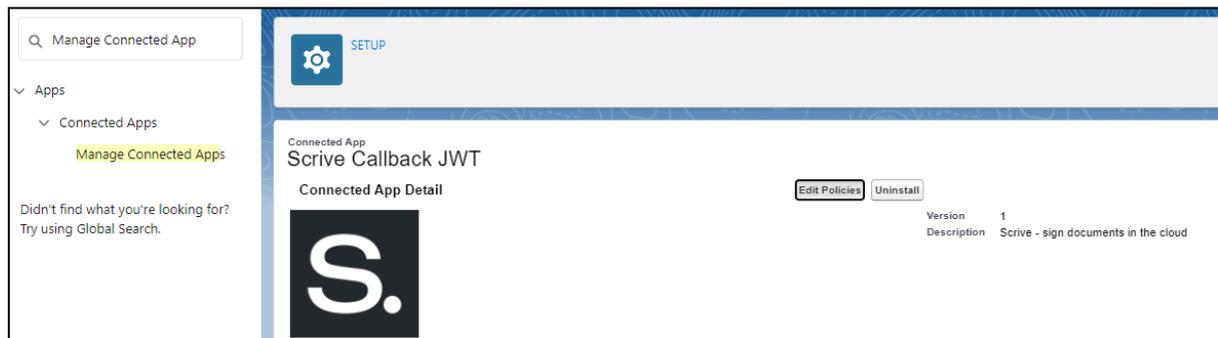
## 4.2 Callback Setup

Callback is a feature that is updating Scrive Document records in Salesforce right after action performed by any party on a Scrive document.

### **IMPORTANT NOTES:**

- Callback is not supported on sandboxes.
- If the manual step described below will not be performed, Scrive Document records in Salesforce will not be updated automatically - manual refresh will be required on a Scrive Document record.

Automatic refresh of the Scrive Document record in Salesforce requires an additional manual step from a subscriber's administrator. Select "Manage Connected Apps" in Setup and "Edit Policies" for "Scrive Callback JWT" connected app.



Connected App  
Scrive Callback JWT

---

Connected App Edit



Version 1

Description Scrive - sign documents in the cloud

---

Basic Information

Start URL

---

OAuth Policies

Permitted Users Admin approved users are pre-authorized ▼

Enable Single Logout Admin approved users are pre-authorized

Permitted User should be set to “Admin approved users are pre-authorized”. After “Save”, callback will be enabled for each user marked as a “Scrive User” in the [Users Management Panel](#).

#### 4.2.1 Troubleshooting

- Document is not updating in SF automatically:
  - ◆ Operating on Sandbox - callback is not supported on sandboxes. The “Refresh” button on a document layout should be used to pull the latest state of the document (details: actions on [Highlights panel](#)).
  - ◆ Make sure that Permitted Users for “Scrive Callback JWT” connected app are “Admin approved users are pre-authorized” (details in [Callback Setup](#))

### 4.3 Scrive Settings

Scrive Settings component contains a form with text fields and checkboxes that are used to configure the package. Settings are divided into sections. Each field has the help text that explains the purpose/implication of the setting. To activate the edit mode the Scrive Admin should click the pencil icon near any field or double click on any field.

 **Scrive Settings**

> [General](#)

∨ Document

Days To Sign - Default Value ⓘ

14 

> [Attachments](#)

### 4.3.1 List of Scrive Settings

<b>Section Name</b>	<b>Scrive Settings Name</b>	<b>Description</b>	<b>Default value</b>
General	Admin Email	Message will be sent to the provided email address when error occurs during processing.	blank
General	Branded Subdomain Api Name	API Name of Named Credential pointing Branded Subdomain API Url.	blank
Document	Days To Sign - Default Value	Will be set as default value for Scrive Documents if the value is not provided in the 'New' Scrive Document form.	14
Attachments	Signed Document Suffix	Suffix that will be added to the signed document file attached to Related Record from this Scrive Document	blank

## 4.4 Branded subdomain

Branded subdomain is a feature (Custom branding is available only in selected pricing plans) which allows customers to add their company custom branding to Scrive messages and Scrive signing/preview pages.

companybrand.scrive.com/s/9222115557468930575/92214029462

# My Company

Test Scriveuser

Signing document: BrandedSubdomain

Follow the **ARROW**

*My Company  
Super Street A 44  
Super City  
Country*

Signing Party

Full name  
Your name

If this feature is enabled, a custom Named Credential record with branded subdomain API URL has to be created (e.g. <https://companyBrand.scrive.com/api/v2/>).

**Named Credentials**

Save Cancel

Label

Name

URL

**Authentication**

Certificate

Identity Type

Authentication Protocol

**Callout Options**

Generate Authorization Header

Allow Merge Fields in HTTP Header

Allow Merge Fields in HTTP Body

Outbound Network Connection

Save Cancel

Once the Named Credential record for branded subdomain is created, it should be pointed in the Admin Panel's Scrive Settings section (details: [Scrive Settings](#)) on "Branded Subdomain Api Name" field with API Name of created Named Credential record.

**Scrive Settings**

Admin Email

Branded Subdomain Api Name

> Document

> Attachments

Cancel Save

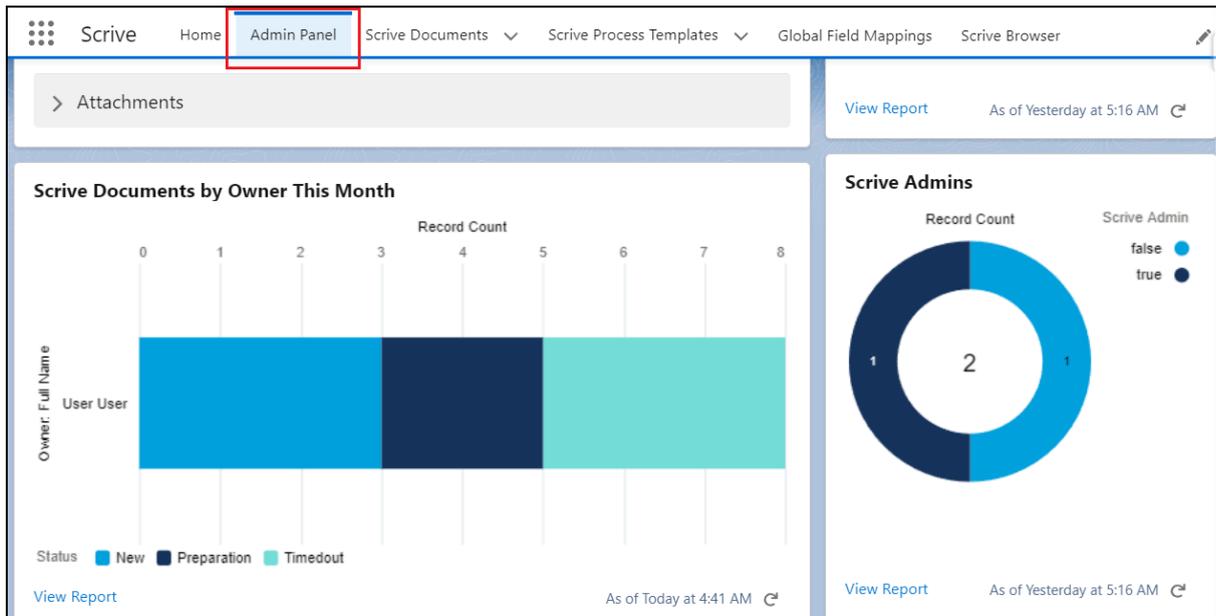
#### 4.4.1 Troubleshooting

- Scrive messages and Scrive signing/preview pages do not contain the branding:
  - ◆ Named Credential with API Name provided in Scrive Settings does not exist.

## 4.5 Scrive Admin Panel - Reports

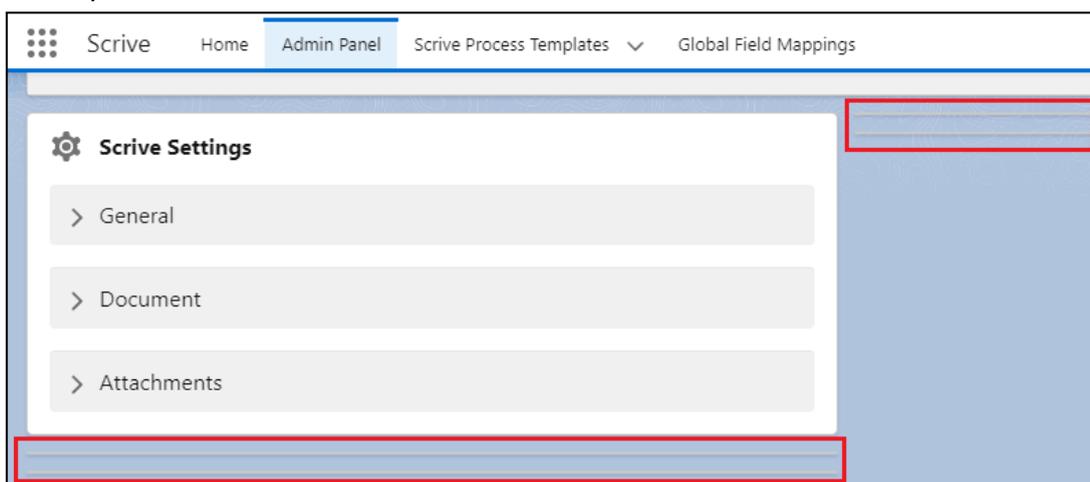
In the Admin Panel there are 4 report charts which can be found useful for Scrive Admins:

- Amount of Scrive Users in the organisation,
- Amount of Scrive Admins in the organisation,
- Scrive Documents by owner this month,
- Scrive Documents by owner overall.



### 4.5.1 Troubleshooting

→ Reports are not visible in the Admin Panel section



- ◆ Verify if the user has 'View Reports in Public Folders' Permission Assigned.

SETUP		Permission Sets
		guest user profiles.
View Real-Time Event Monitoring Data	<input type="checkbox"/>	Query Real-Time Event Monitoring Data using the API.
View Reports in Public Folders	<input checked="" type="checkbox"/>	View and access reports in public folders, which does not include others' personal folders.
View Restriction and Scoping Rules	<input type="checkbox"/>	View Restriction and Scoping Rules.
View Roles and Role Hierarchy	<input type="checkbox"/>	Allow user to view roles and role hierarchy.

## 5. Global Field Mappings

Global Field Mappings are the general field mappings used for the organisation. Field mapping is the relationship between Scrive fields from Scrive Document and Salesforce fields on Salesforce records. This is required to exchange the data between Salesforce and Scrive for Scrive Document processing - it works in two directions:

- From Salesforce records fields to Scrive Document fields - Scrive Document fields can be populated with values from related Salesforce records on Scrive Document creation (Scrive Document will be sent to the recipients with values gathered from Salesforce records).
- From Scrive Document fields to Salesforce record fields - values from Scrive Document fields provided during the signing process by recipients can be populated to Salesforce records fields (Salesforce records will be updated with values provided by recipients during signing process).

Mapping Level	Salesforce Object	Salesforce Field	Scrive Field
1 Document	Opportunity	Name	name 1

**Note:** Global Field Mappings can be replaced by Field Mappings set on Scrive Process Template Party or Scrive Document Party level (user interface for Scrive Process Template and Scrive Document presents the table for each party with applicable Field Mappings for this specific party).

**Note:** Default Global Field Mappings are created on a package's installation. Scrive Admin can edit them, remove them and add new Field Mappings.

Mapping Level	Salesforce Object	Salesforce Field	Scrive Field	Salesforce To Scrive	Scrive To Salesforce
1 Party	Contact	FirstName	name 1	✓	✓
2 Party	Contact	LastName	name 2	✓	✓
3 Party	Contact	Email	email	✓	✓
4 Party	Contact	MobilePhone	mobile	✓	✓
5 Party	Contact	ScriveSF_PersonalNumber_c	personal_number	✓	✓
6 Party	User	FirstName	name 1	✓	✓
7 Party	User	LastName	name 2	✓	✓
8 Party	User	Email	email	✓	✓
9 Party	User	MobilePhone	mobile	✓	✓
10 Party	User	ScriveSF_PersonalNumber_c	personal_number	✓	✓
11 Document	Opportunity	Name	testTextField	✓	✓

## 5.1 Field Mapping Definition

Field Mapping is a definition of the data exchange between Scrive and Salesforce. Being more specific, it's a definition of the data exchange between Scrive Field and Salesforce Field.

For all kinds of Scrive Documents we can use standard Scrive Fields for mapping. For the Scrive Documents based on Scrive Template (templates defined on a [scrive.com](https://scrive.com) portal), we can utilise custom Scrive Fields created on a Scrive Template.

Field Mapping definition is based on a few parameters:

- **Mapping Level** - selected Scrive Object (Document or Party) that defines if the field mapping is based on a lookup relationship to the Scrive Document or on a lookup relationship to the Scrive Document Party.
- **Salesforce Object** - selected Salesforce Object with lookup relationship to the Scrive Object (Document or Party) pointed in the 'Mapping Level' field.
- **Salesforce Field** - selected Salesforce Field from Salesforce Object pointed in the 'Salesforce Object' field.
- **Scrive Field** - selected Scrive Field from Scrive Template defined on [scrive.com](https://scrive.com) portal.

By default Field Mappings can be based on already existing relationships:

Mapping Level	SF Object (default relationships)	SF Field (sample fields)
Document	Opportunity	Opportunity.Name
Party	Contact	Contact.LastName
Party	User	User.LastName

Field Mappings can be also based on custom relationships to Document or Party (how to define: [Using Custom Object for a lookup relationship with Document or Document Party](#)).

*Note:* Scrive Template Name or Scrive Template Id is not stored on a Field Mapping record, but it is used to simplify the search of Scrive Field.

*Note:* If Scrive Field Name is the same for many Scrive Templates defined on [scrive.com](#) portal, a Field Mapping record will be valid for all these Scrive Templates.

- **Salesforce To Scrive** - points if the Field Mapping from Salesforce record to Scrive Document is active (if checked, the Field Mapping logic will process the data update from Salesforce to Scrive).
- **Scrive To Salesforce** - points if the Field Mapping from Scrive Document to Salesforce record is active (if checked the Field Mapping logic will process the data update from Scrive to Salesforce).

Field Mapping table contains also buttons with special icons in each row (for each Field Mapping record):

-  - 'Edit' button,
-  - 'Delete' button.

Field Mappings can be created on 3 levels:

1. Global level - defined in Global Field Mappings tab,
2. Process Template Party level - defined on Process Template record for each party,
3. Document Party level - defined on Document record for each party.

Field Mapping created on the Process Template Party will override Global Field Mapping definition for this specific Process Template Party, if those Field Mappings' configurations point to the same 'Mapping Level', 'Salesforce Object' and 'Salesforce Field'.

Field Mapping created on the Document Party will override related Process Template Party and Global Field Mapping definitions for this specific Document Party, if those Field Mappings' configurations point to the same 'Mapping Level', 'Salesforce Object' and 'Salesforce Field'.

## 5.2 Adding new Field Mapping

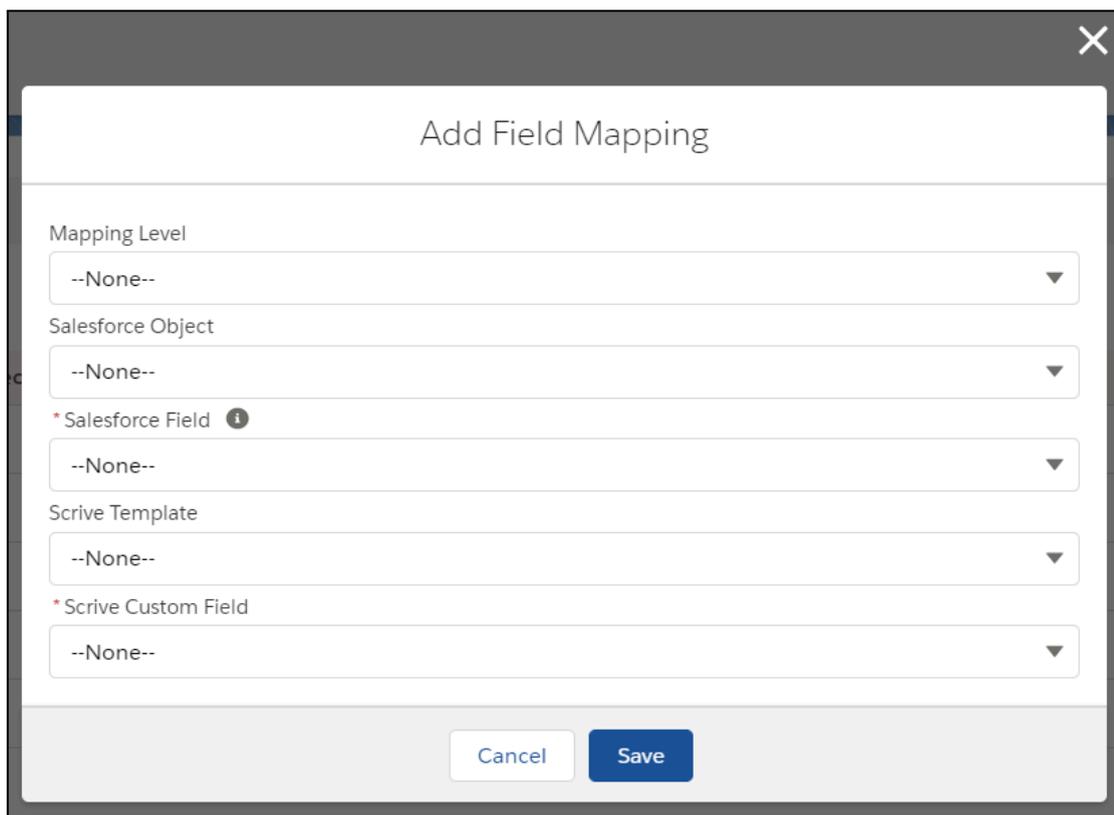
'Add Field Mapping' button is placed on the top right part of the Field Mapping component and it will trigger a popup with the Field Mapping definition form. The initial loading might take some time, because Salesforce attempts to pull the list of Scrive Templates with Scrive Fields defined on [scrive.com](#) portal.

The user has to have 'Scrive User' permission to access the list of Scrive Templates with Scrive Fields pulled from [scrive.com](https://scrive.com) portal (please, review [Scrive User permission - management](#) section).

**Notes:**

- The 'Salesforce Object' picklist is dependent on the 'Mapping Level' field (if no value is selected in the 'Mapping Level' field, the 'Salesforce Object' picklist will be empty).
- The 'Salesforce Field' picklist is dependent on the 'Salesforce Object' field (if no value is selected in the 'Salesforce Object' field, the 'Salesforce Field' picklist will be empty).
- The 'Scrive Field' picklist is dependent on the 'Scrive Template' field (if no value is selected in the 'Scrive Template' field, the 'Scrive Field' picklist will be empty).

To define a new Field Mapping record the user has to provide values for all fields from the form.



The screenshot shows a modal window titled "Add Field Mapping" with a close button (X) in the top right corner. The form contains the following fields:

- Mapping Level: Dropdown menu with "--None--" selected.
- Salesforce Object: Dropdown menu with "--None--" selected.
- \* Salesforce Field: Dropdown menu with "--None--" selected. A small information icon (i) is visible to the right of the label.
- Scrive Template: Dropdown menu with "--None--" selected.
- \* Scrive Custom Field: Dropdown menu with "--None--" selected.

At the bottom of the form, there are two buttons: "Cancel" (light blue) and "Save" (dark blue).

When a Field Mapping record is created it has to be activated by checking the 'Salesforce to Scrive' and/or 'Scrive To Salesforce' checkboxes (according to the requirements). The pencil icon will activate the edit mode.

Field Mappings							<a href="#">Add Field Mapping</a>
Mapping Level	Salesforce Object	Salesforce Field	Scrive Field	Salesforce To Scrive	Scrive To Salesforce		
1	Document	Opportunity	NextStep	testTextField			✎ 🗑

### 5.3 Editing existing Field Mapping

'Edit' button is placed in each row and triggers a popup with the Field Mapping definition form. First part of the form is disabled - the user can't change the Salesforce part of the definition ('Mapping Level', 'Salesforce Object' and 'Salesforce Field' fields are disabled). The user can edit the Scrive part of the definition ('Scrive Template' and 'Scrive Field' are editable).

The user has to have 'Scrive User' permission to access the list of Scrive Templates with Scrive Fields pulled from [scrive.com](https://scrive.com) portal (please, review [Scrive User permission - management](#) section).

✕

### Add Field Mapping

---

Mapping Level

Salesforce Object

\* Salesforce Field ⓘ

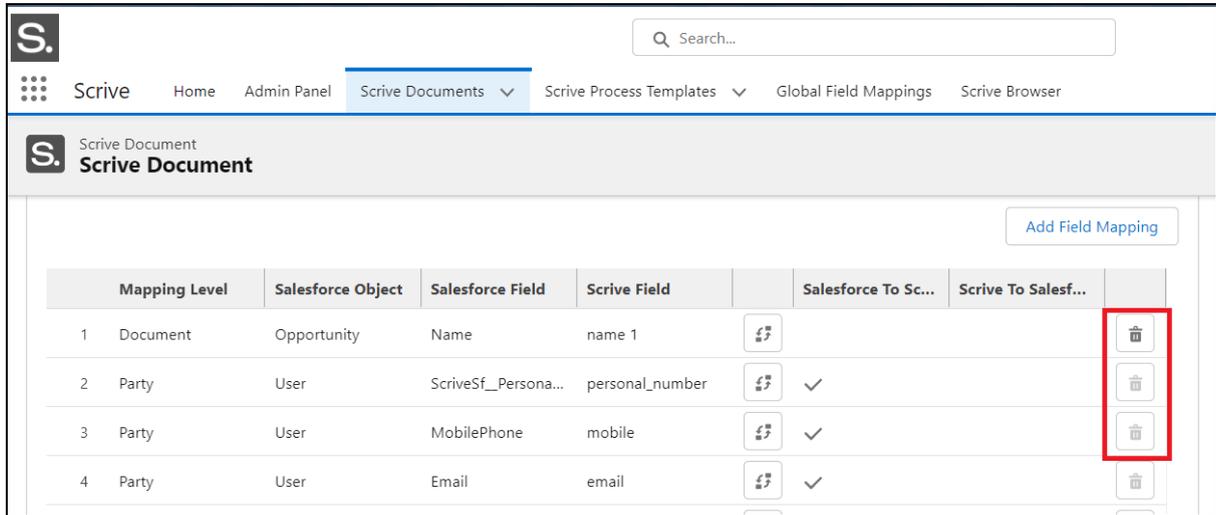
Scrive Template

\* Scrive Custom Field

### 5.4 Removing existing Field Mapping

'Delete' button is placed at the end of each row and it deletes the Field Mapping record.

If the 'Delete' button is disabled it means that the Field Mapping record can't be deleted from the current level, e.g. Global Field Mapping can't be removed from Document Party level (from Scrive Document user interface).



The screenshot shows the Scrive Document user interface. At the top, there is a search bar and navigation tabs: Home, Admin Panel, Scrive Documents (selected), Scrive Process Templates, Global Field Mappings, and Scrive Browser. Below the navigation is a header for 'Scrive Document' with an 'Add Field Mapping' button. The main content is a table with the following columns: Mapping Level, Salesforce Object, Salesforce Field, Scrive Field, Salesforce To Sc..., Scrive To Salesf..., and a final column with icons. The table contains four rows of data. The second row's 'Delete' icon (a trash can) is highlighted with a red box.

Mapping Level	Salesforce Object	Salesforce Field	Scrive Field	Salesforce To Sc...	Scrive To Salesf...	
1	Document	Opportunity	Name	name 1		
2	Party	User	ScriveSf_Persona...	personal_number	✓	
3	Party	User	MobilePhone	mobile	✓	
4	Party	User	Email	email	✓	

## 5.5 Troubleshooting

- 'Credentials not found for User' Provisioning Status for a user:
  - ◆ The user is missing Scrive User permission set - (please, review [Scrive User permission - management](#) section).

## 6. Translations

All components are based on custom labels, so System Administrator can provide translations in the Salesforce Setup (Setup/Custom Labels/specific Custom Label record) in section 'Local Translations / Overrides'. This is a standard Salesforce process ([documentation](#)).

The screenshot shows the Salesforce Setup interface for Custom Labels. The left sidebar contains a search bar with 'Custom Labels' and a navigation menu with 'User Interface' expanded to show 'Custom Labels'. The main content area displays the 'ScriveSettings (Managed)' Custom Label details. A yellow banner indicates that this label is managed, meaning only certain attributes can be edited. Below this, a table shows the following details:

Custom Label Detail		Edit
Short Description	Scrive Settings	
Language	English	
Namespace Prefix	ScriveSf	
Categories	ScriveSettings	
Value	Scrive Settings	
Created By	Admin Cloudify, 30/05/2021, 17:22	Edit

Below the details, there is a section for 'Local Translations / Overrides' with a 'New Local Translations / Overrides' button. A yellow banner states: 'These translations were created by administrators in your company. Local translations override packaged ones.' Below this, it says 'No records to display'.

For now the package is only in English.

## 7. Using Custom Object for a lookup relationship with Scrive Document or Scrive Document Party

### 7.1 Custom Object as Related Record to Scrive Document

To use a custom object as a Related Record on a Scrive Document, the System Administrator has to create a new lookup relationship on a Scrive Document object that points to the desired custom object. What is important - 'Allow Search' option has to be checked on a custom object that is in the relationship with Scrive Document (otherwise the Related Record component on a Scrive Document interface will not be able to search related records and throw error - even if searching for a record of different object).

SETUP > OBJECT MANAGER  
**Scrive Document**

Scrive Document  
New Custom Field [Help for this Page](#)

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

**Step 1. Choose the field type** Step

Next Cancel

Specify the type of information that the custom field will contain.

**Data Type**

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

**Lookup Relationship** Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search

Consider new Field Mapping records to gain more from the new lookup relationship on a Scrive Document object

## 7.2 Custom Object as a Source Record for the Scrive Document Party

To use a custom object as a source record for a Scrive Document Party, the System Administrator has to create a new lookup relationship on a Scrive Document Party object that points to the desired custom object.

SETUP > OBJECT MANAGER  
Scrive Document Party

Scrive Document Party  
New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship

Consider new Field Mapping records to gain more from the new lookup relationship on a Scrive Document Party object.

## 7.3 Troubleshooting

- Record can't be found on a Related Record component right after setting the lookup relationship with Scrive Document object ('Allow Search' option is checked on a custom object definition form):
  - ◆ Try once again after a few minutes - records will be searchable when Salesforce data model re-calculation will be done.
- Related Record component on a Scrive Document interface throws an error: 'entity type ScriveSf\_\_testDoc\_\_c does not support search':
  - ◆ Check if all custom objects that are used for a lookup relationships on a Scrive Document object have the 'Allow Search' option checked on a custom object definition form.

## 8. Scrive Document

Scrive Document is an object that represents the document record from a [scrive.com](https://www.scrive.com) service. Scrive Documents are accessible for users with 'Scrive User' permission (please, review [Scrive User permission - management](#) section) and for users with 'Scrive Viewer' permission, but only in a read only mode (please, review [Scrive Viewer permission - management](#) section). 'New' button on related lists and on an object page will direct to the form with the details of the document.

### New Scrive Document

**Information**

Title <input style="width: 95%; height: 20px;" type="text"/>	Days To Sign <input style="width: 95%; height: 20px;" type="text"/>
Language <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <span>English</span> <span style="margin-left: 5px;">▼</span> </div>	Days to Remind <input style="width: 95%; height: 20px;" type="text"/>

**Messages**

Invitation Message <div style="border: 1px solid #ccc; height: 30px; width: 95%;"></div>	Confirmation Message <div style="border: 1px solid #ccc; height: 30px; width: 95%;"></div>
---	---

**Signing Page Settings**

Show Header <input checked="" type="checkbox"/>	Is Receipt <input type="checkbox"/>
Show Footer <input checked="" type="checkbox"/>	Show Auto-Scroll Arrow <input checked="" type="checkbox"/>
Show PDF Link <input checked="" type="checkbox"/>	Show Reject Button <input checked="" type="checkbox"/>
	Allow Rejection Comment <input checked="" type="checkbox"/>

Cancel
Save & New
Save

Below is the layout of the Scrive Document record. At the top, it contains a highlights panel with the most important information. The main column component contains 4 tabs: 'Details' (details of the Scrive Document record), 'Parties' (details of Scrive Document Parties), 'Attachments' (details of related Attachments) and 'Events' (List of events related to the document). The right column contains the 'Related Record' component, the 'Main file Selector' component and the 'PDF Preview' of the Main Document (appears when the signing process is initiated and the latest version of the main document is pulled from [scrive.com](https://scrive.com) service).

The screenshot displays the Scrive Document interface. At the top, there is a header with the Scrive logo and the text "Scrive Document". Below the header, there are three buttons: "Create Draft", "Send", and "Delete".

The main content area is divided into several sections:

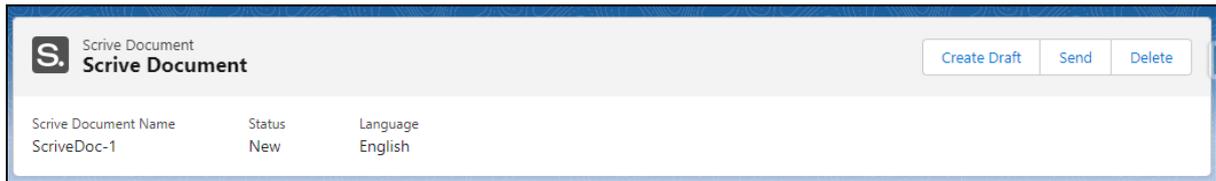
- Document Information:** Shows "Scrive Document Name" as "ScriveDoc-0", "Status" as "New", and "Language" as "English".
- Details Panel:** Contains tabs for "Details", "Parties", "Attachments", and "Events". Under "Details", there are sections for:
  - Information:** Fields for Title ("Scrive Document"), Days To Sign ("14"), Language ("English"), and Days to Remind.
  - Messages:** Fields for Invitation Message and Confirmation Message.
  - Signing Page Settings:** A list of checkboxes for various settings: Show Header (checked), Show Footer (checked), Show PDF Link (checked), Is Receipt (unchecked), Show Auto-Scroll Arrow (checked), Show Reject Button (checked), and Allow Rejection Comment (checked).
- System Information:** A link to view more details.
- Related Record:** A section for managing related records.
- Main File:** A section for managing the main file, with a red message: "Please provide Main File for Scrive Document".

## 8.1 Highlights panel

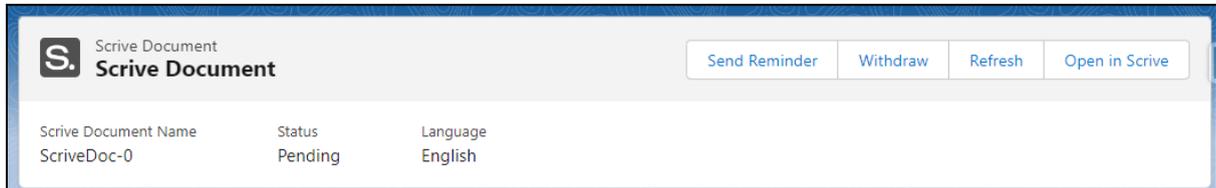
Highlights panel contains the most important information from the Scrive Document record and set of buttons. Set of buttons depends on the current status of the document.

- Create Draft - creates the draft document in the scrive.com service based on a Salesforce record,
- Update Draft - updates the draft document in the scrive.com service based on a Salesforce record,
- Send - updates the draft document in the scrive.com service based on a Salesforce record and sends the document,
- Send Reminder - sends reminder to the recipients,
- Withdraw - cancels the signing process for the document,
- Restart - restarts the signing process for the document,
- Remove Pages - removes pointed pages from the main document,
- Prolong - extends the signing process for the document,
- Forward - forward the document to provided email address,
- Refresh - pulls the latest version of the document from scrive.com service to update the Scrive Document record in Salesforce,
- Open in Scrive - opens the Scrive Document in scrive.com portal,
- Delete - removes the document from scrive.com service and Salesforce.

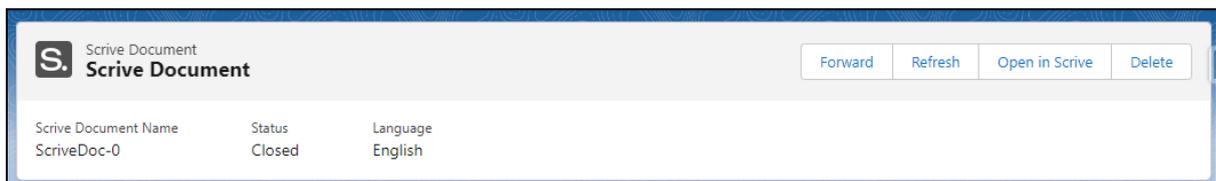
Available actions in 'New' status:



Available actions in 'Pending' status:

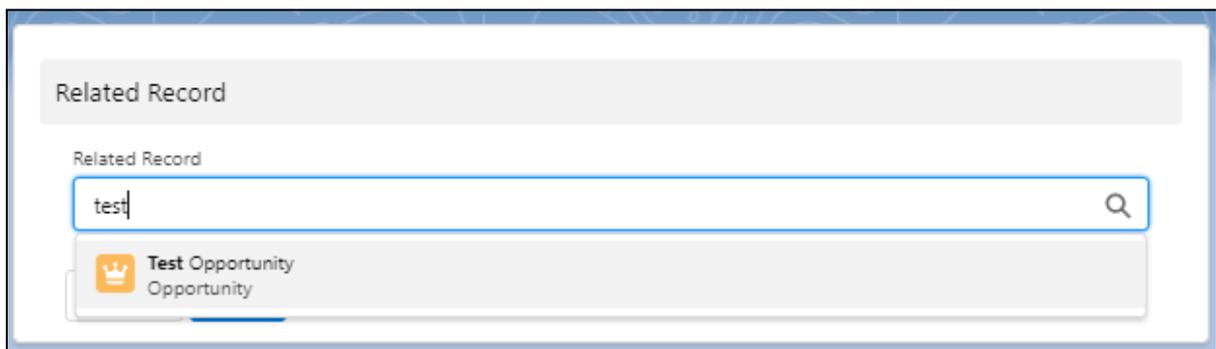


Available actions in 'Closed' status:



## 8.2 Related Record

'Related Record' component points to the record related to the Scrive Document. The related record component searches against records from objects to which Scrive Document has a lookup relationship. This relationship might be used for field mapping or building the main file based on a visual force page build based on the related record. Pointing a related record for a Scrive Document is optional.

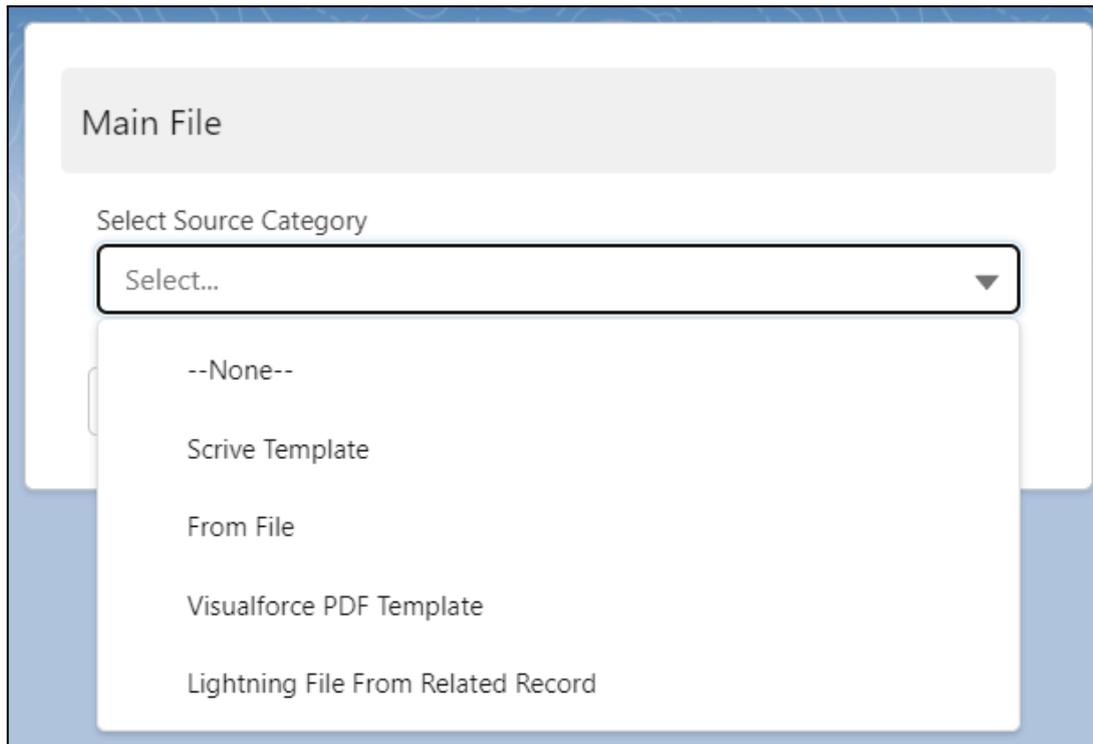


## 8.3 Main File

'Main File' component points to the source for the main file for the Scrive Document. Available options:

- Scrive Template - template prepared on scrive.com portal,
- From File - uploaded PDF file,
- Visualforce PDF template - visual force page rendered as PDF in a context of related record (It might be used without related record),

- Lightning File From Related Record - related Lightning File from related record (related record has to be provided in the 'Related Record' component).



If the Scrive Document is in 'New' or 'Preparation' status, the preview of the main file will be presented (available only for 'From File' and 'Lightning File From Related Record' options).

## 8.4 Details tab

'Details' tab is divided in sections:

- Information - general information about the Scrive Document,
- Messages - messages for the Scrive Document,
- Signing Page Settings - general settings of the signing page,
- System Information - general system information about the record.

## 8.5 Parties tab

'Parties' tab consists of sub-tabs, one for each Scrive Document Party related to the document.

The 'New Party' tab creates a new Scrive Document Party related to the Scrive Document.

Sub-tab for each Scrive Document Party is divided in sections:

- Party source, Details, Delivery, Authentication
- Request Attachments (not available for every party see details in [Request Attachments](#))
- Field Mappings

Details **Parties** Attachments Events

Document Party New Party Delete

Party Source

Party Source  
Logged In User ✎

Details

Signing Order: 1 ✎ Signatory Role: Viewer ✎ Hide Personal Number:  ✎

Allow Highlighting:  ✎ Allow Forwarding:  ✎

Delivery

Delivery Method: Email ✎ Confirmation by: Email ✎

Authentication

Authentication to Sign: No extra authentication ✎ Authentication to View: No extra authentication ✎ Authentication to View Archived: No extra authentication ✎

Field Mappings Add Field Mapping

Mapping Level	Party	Salesforce Object	Salesforce Field	Scrive Field		Salesforce To Scrive	Scrive To Salesforce	
1	Party	User	FirstName	name 1	<span>✎</span>	✓		<span>✎</span>
2	Party	User	LastName	name 2	<span>✎</span>	✓		<span>✎</span>
3	Party	User	Email	email	<span>✎</span>	✓		<span>✎</span>
4	Party	User	MobilePhone	mobile	<span>✎</span>	✓		<span>✎</span>
5	Party	Contact	ScriveSF_PersonalNum...	personal_number	<span>✎</span>	✓	✓	<span>✎</span>
6	Party	Contact	FirstName	name 1	<span>✎</span>	✓	✓	<span>✎</span>
7	Party	Contact	LastName	name 2	<span>✎</span>	✓	✓	<span>✎</span>

If there are more parties than the layout allows, the last tab switches to the drop-list button where the user may select the remaining parties that are hidden or create a new one.

Details **Parties** Attachments Events

Document Party Document Party Document Party Document Party **Document Party** More ▼

Document Party Delete

Document Party

Party Source

Document Party

New Party

### 8.5.1 Party Source

'Party Source' section contains a dynamic form that defines the source for the Scrive Document Party:

- **Logged in User** - Party is based on the owner of the Scrive Account used for sending this Scrive Document. Option is used for Scrive Document's first party which is created by default and can't be removed. Source for the first party can't be changed.

- **Email**
  - **Static** - Email address for Scrive Document Party is provided in an input field.

- **NOTE:** When Party Source is set to Email, name fields are optional for this party (signing party will not be asked to provide it during the signing process).

- **Email And Party**
  - **Static** - Email address, First Name and Last Name for Scrive Document Party is provided in an input field.

- **Record**
  - **Object** (List of lookup fields on a Scrive Document Party object - by default Contact and User)
    - Lookup input field for selected object

Party Source

Party Source: Record

Type: Contact [ScriveSF\_Contact\_c - Contact]

Contact: Search undefined...

Cancel Save

## 8.5.2 Details, Delivery, Authentication

'Details' section contains general information about the Scrive Document Party.

'Delivery' allows the user to select the method of delivering the document and the confirmation way.

'Authentication' section allows the user to enforce additional authentication to Sign or View the document.

Details

Signing Order: 1

Signatory Role: Viewer

Hide Personal Number:

Allow Highlighting:

Allow Forwarding:

Delivery

Delivery Method: Email

Confirmation by: Email

Authentication

Authentication to Sign: No extra authentication

Authentication to View: No extra authentication

Authentication to View Archived: No extra authentication

**Note:** The logic behind the 'Delivery' and 'Authentication' sections enforces proper list and mixing of the methods based on Scrive Company Setup. See example below: logic hides some options of 'Authentication to Sign' field as hidden options can't be mixed with selected 'Authentication to View' option.

Authentication

Authentication to Sign: No extra authentication

Authentication to View: No extra authentication

Cancel Save

Authentication

Authentication to Sign: No extra authentication

Authentication to View: Swedish BankID

Cancel Save

Mapping L...	Salesforce ...	Salesforce ...	Scrive Field
1	Party	User	FirstName name 1
2	Party	User	LastName name 2
3	Party	User	Email email

**Note:** If some method is missing, please contact Scrive Support to enable it on the Scrive Company Account.

### 8.5.3 Request Attachments

'Request Attachments' section contains the table of Request Attachments defined for the specific Scrive Document Party. The section will be unavailable for the Logged In User (initiating party) and will be available only for Scrive Document Parties with Signatory Role set as "Signing Party".

The screenshot shows a configuration page for a Document Party. At the top, there are tabs for 'Document Party', 'Document Party', and 'New Party'. A 'Delete' button is in the top right. The main content is organized into sections: 'Party Source' (with an edit icon), 'Details' (containing 'Signing Order' set to 1, 'Signatory Role' set to Signing Party, 'Hide Personal Number' checkbox, 'Allow Highlighting' checkbox, and 'Allow Forwarding' checkbox), 'Delivery' (containing 'Delivery Method' set to Email and 'Confirmation by' set to Email), 'Authentication' (containing 'Authentication to Sign', 'Authentication to View', and 'Authentication to View Archived', all set to 'No extra authentication'), 'Party Request Attachments' (showing 'No request attachments...' and an 'Add' button), and 'Field Mappings'.

A request attachment can be added with the 'Add' button available in the section. A popup will be displayed to provide necessary information. Name of the Request Attachment is unique within all Request Attachments of a particular Scrive Document record.

The screenshot shows a popup form titled 'New Request Party Attachment'. It has two input fields: '\* Name' and 'Description'. Below these are two checkboxes: 'Merge With Main File' and 'Required'. At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Each Request Attachment can be marked as "Required" - if checked the Signing Party must upload the attachment. Otherwise it is optional. Additionally, each Request attachment can be marked as "Merge With Main File" to add the attachment to the sealed document. Those options can be changed by inline editing.

Party Request Attachments				
Name	Merge With Main File	Required	Description	
1 Attachment 1	✓	✓	Sample description	

### 8.5.4 Field Mappings

'Field Mappings' section contains the table of related Field Mappings for a Scrive Document Party. The table shows all applicable field mappings to the Scrive Document Party. "Salesforce to Scrive" and "Scrive to Salesforce" columns are editable and indicate if the specific direction of the mapping is activated. Only activated field mappings are used for the field mapping logic.

Field Mappings								
Mapping Level	Salesforce Object	Salesforce Field	Scrive Field		Salesforce To Scrive	Scrive To Salesforce		
1	Party	Contact	FirstName	name 1		✓	✓	
2	Party	Contact	LastName	name 2		✓	✓	
3	Party	Contact	Email	email		✓	✓	
4	Party	Contact	MobilePhone	mobile		✓	✓	
5	Party	Contact	ScriveSf_PersonalNu...	personal_number		✓	✓	
6	Party	User	FirstName	name 1		✓	✓	
7	Party	User	LastName	name 2		✓	✓	
8	Party	User	Email	email		✓	✓	
9	Party	User	MobilePhone	mobile		✓	✓	
10	Party	User	ScriveSf_PersonalNu...	personal_number		✓	✓	

The full functionality of the field mappings component is available when the Scrive Template is selected for Main File source in the 'Main File' component. Otherwise, adding new field mapping and edit mode for field mappings are disabled. The 'Salesforce To Scrive' and 'Scrive To Salesforce' columns point the directions of the mapping and are still editable. Those values trigger the field mapping logic.

Field Mappings								
Mapping Level	Salesforce Object	Salesforce Field	Scrive Field		Salesforce To Sc...	Scrive To Salesf...		
1	Party	Contact	FirstName	name 1	↔	✓	✓	🗑️
2	Party	Contact	LastName	name 2	↔	✓	✓	🗑️
3	Party	Contact	Email	email	↔	✓	✓	🗑️

More information about Field Mappings are available in the [Global Field Mappings](#) section.

## 8.6 Attachments tab

'Attachments' tab contains the table with the list of attachments. 'New' button opens the popup form to define a new attachment. Attachments can be based on:

- From File - uploaded file

The screenshot shows the 'New Document Attachment' form. The 'Scrive Document Name' field contains 'ScriveDoc-2'. The '\* Source Type' dropdown is set to 'From File'. There is an empty '\* Name' field. To the right, there is an 'Attachment to add' section with an 'Upload Files' button and the text 'Or drop files'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

- Lightning File From Related Record (option available when related record is provided on a 'Related Record' component)

The screenshot shows the 'New Document Attachment' form. The 'Scrive Document Name' field contains 'ScriveDoc-2'. The '\* Source Type' dropdown is set to 'Lightning File From Related Record'. There is an empty '\* Name' field. To the right, there is a '\* Selected option for chosen Source Type' dropdown set to 'Select...'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

- Visualforce PDF Template - visual force page rendered as PDF in a context of related record (It might be used without related record). The user must have access to the visualforce page to be able to see it in the Source Type options. There is a limit of 100 Visualforce Pages to be displayed.

New Document Attachment

Scrive Document Name  
ScriveDoc-2

\* Source Type  
Visualforce PDF Template

\* Name

\* Selected option for chosen Source Type  
Select...

Table contains general information about related attachments and the possibility to preview the content of each attachment. Attachment records can be edited or removed based on options from the dropdown list (arrow in the last column). Name of the Attachment is unique within all Request Attachments of a particular Scrive Document record

Details Parties **Attachments**

**Related Document Attachments:** New

Name	Source Type	Created Date	
<a href="#">Attachment from file</a>	From File	Jun 29, 2021	<a href="#">preview</a> ▼
<a href="#">Attachment from VF page</a>	Visualforce PDF Template	Jun 29, 2021	<a href="#">preview</a> ▼
<a href="#">Attachment Lightning File from related record</a>	Lightning File From Related Record	Jun 29, 2021	<a href="#">preview</a> ▼

## 8.6 Events tab

The Events tab displays all historical events related to the document. The table is in a read-only mode and the records are stored in the Salesforce.

Details Parties Attachments **Events**

**Historical Events of the document:**

Status	Party Name	Time Stamp	Description
sealed	Scrive	2023-03-22T10:31:08.000Z	The document was sealed with a digital signature.

## 8.7 Main Document preview

'Main Document' component shows the preview of the document. For some time it will be loading (spinner will be visible), but after several seconds the miniature of the first page of the document will appear.



The preview of the full document will appear full size after clicking on the miniature.

The screenshot displays the Scrive Document interface. At the top, there's a header with the Scrive logo and the text 'Scrive Document'. Below this, a summary row shows 'Scrive Document Name: ScriveDoc-0', 'Status: Pending', and 'Language: English'. Action buttons for 'Send Reminder', 'Withdraw', 'Refresh', and 'Open in Scrive' are visible in the top right.

The main content area is divided into several sections:

- Details:** This section is active and contains sub-sections:
  - Information:** Fields for Title (Scrive Document), Language (English), Days To Sign (14), and Days to Remind.
  - Messages:** Fields for Invitation Message and Confirmation Message.
  - Signing Page Settings:** A list of settings with checkboxes, including Show Header, Show Footer, Show PDF Link, Is Receipt, Show Auto-Scroll Arrow, Show Reject Button, and Allow Rejection Comment.
  - System Information:** A link to view more details.
- Related Record:** A section showing 'No Related Record'.
- Main File:** A section showing 'Visualforce PDF Template' and 'ExampleScrivePdfPage'.
- Main Document:** A preview of the document content, which includes a 'Welcome to Scrive!' message and a small graphic.

## 9. Scrive Process Template

Scrive Process Template is an object that represents the recipe for the Scrive Document record based on a specific record that has a lookup relationship to the Scrive Document object. The Scrive Process Template layout is similar to the Scrive Document layout with few differences.

### 9.1 Highlights panel

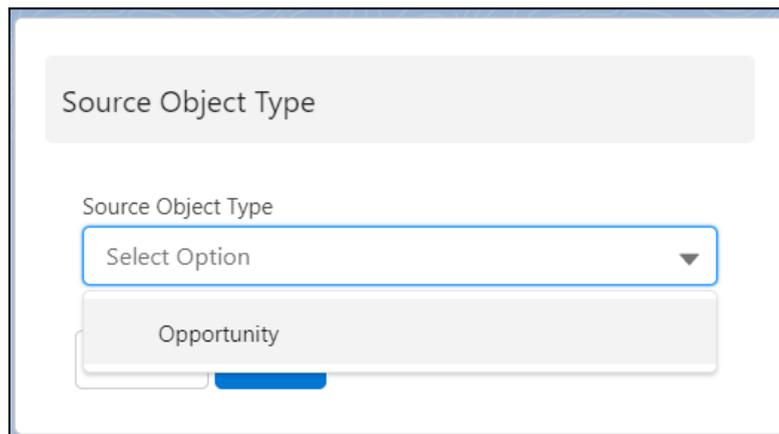
By default the highlights panel contains only a Scrive Process Template name. Additionally, only when the 'Scrive Template' is pointed as the Main File source the "Import Configuration from Scrive" button appears (details: [Import Configuration From Scrive](#)).

The screenshot shows the highlights panel for a Scrive Process Template. It features the Scrive logo and the text 'Scrive Process Template' followed by 'Scrive Process Template' in a larger font. On the right side, there is a button labeled 'Import Configuration from Scrive'.

## 9.2 Source Object

'Source Object' component points to the source object for the Scrive Process Template. Providing a specific source object is required. Component contains a picklist with objects that have a lookup relationship to the Scrive Document (by default it's 'Opportunity').

Other objects also can be used as a source object for Scrive Process Template (more on building custom relationship to Scrive Document object: [Custom Object as Related Record to Scrive Document](#)).



The image shows a screenshot of a user interface component for selecting a source object type. At the top, there is a light gray header box with the text "Source Object Type". Below this, the label "Source Object Type" is positioned above a picklist dropdown menu. The dropdown menu is currently open, showing a list of options. The first option, "Opportunity", is highlighted with a blue bar at the bottom of the list. The text "Select Option" is visible inside the dropdown box, and a small downward arrow is on the right side of the box.

## 9.3 Main File

'Main File' component points to the source for the main file for the Scrive Document created from Scrive Process Template. Available options:

- Scrive Template - template prepared on scrive.com portal. Scrive Template from scrive.com portal can be used as a base for fields and the main document of the Scrive Template can be overridden with Visual PDF Template or Lightning File From Related Record. If there is no need for overriding the main document the 'Override Scrive Template with Source Category' field should be left empty.

Main File

Select Source Category  
Scrive Template

Select Source  
templateTest

Override Scrive Template with Source Category  
Select...

- None--
- Visualforce PDF Template
- Lightning File From Related Record

**NOTE:** Scrive Administrator shall have Scrive User permission (and be authorized against Scrive - [Scrive Authorization](#)) set assigned as well to be able to pull available Scrive Templates from scrive.com site. Otherwise the user will face the following exception.

Main File

Scrive Authorization is not yet set for the current User [005QJ000002yG6EYAU].  
Start Scrive Authorization from Scrive app home page.

Select Source Category  
Scrive Template

Cancel Save

- Visualforce PDF template - visual force page rendered as PDF in a context of the record on which the Scrive Process Template is executed. Fields and related records' fields can be filled in Visualforce Page based on the record from which the Scrive Process Template is started.

Main File

Select Source Category  
Visualforce PDF Template

Select Source  
Select...

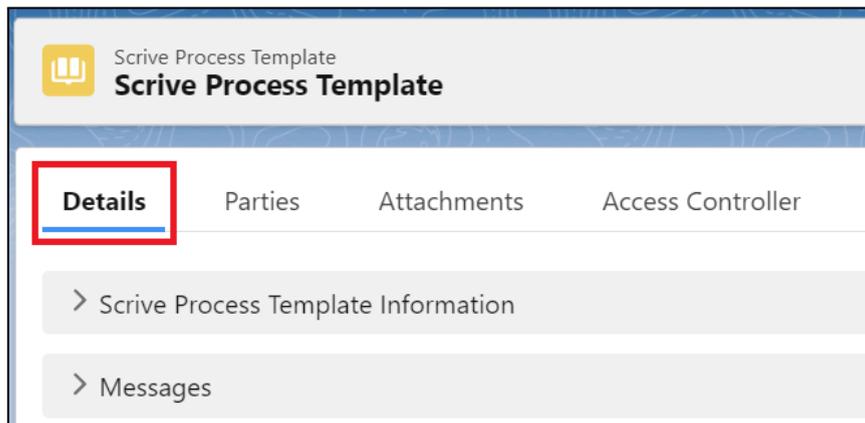
Cancel Save

- Lightning File From Related Record - related Lightning File from related record. From the Scrive Process Template context the Lightning Files from the related record are unknown. Because of that, 'Newest' and 'Oldest' options can be selected (newest or oldest Lightning File from related record based on a Created Date).

## 9.4 Details tab

'Details' tab is divided in sections:

- Information - general information about the Scrive Document,
- Messages - messages for the Scrive Document,
- Signing Page Settings - general settings of the signing page,
- System Information - general system information about the record.



## 9.5 Parties tab

'Parties' tab has for sub-tabs, one for each Scrive Process Template Party related to the Scrive Process Template.

The 'New Party' tab creates a new Scrive Process Template Party related to the Scrive Process Template. Sub-tab for each Scrive Process Template Party is divided in sections:

- Party source, Details, Delivery, Authentication
- Request Attachments (not available for every party see details in [Request Attachments](#))
- Field Mappings

Details **Parties** Attachments Access Controller

Template Party Template Party New Party Delete

Party Source

Party Source  
Logged In User ✎

Details

Signing Order ✎ Signatory Role ✎ Hide Personal Number  ✎  
1 Viewer

Allow Highlighting  ✎ Allow Forwarding  ✎

Delivery

Delivery Method ✎ Confirmation by ✎  
Email Email

Authentication

Authentication to Sign ✎ Authentication to View ✎ Authentication to View Archived ✎  
No extra authentication No extra authentication No extra authentication

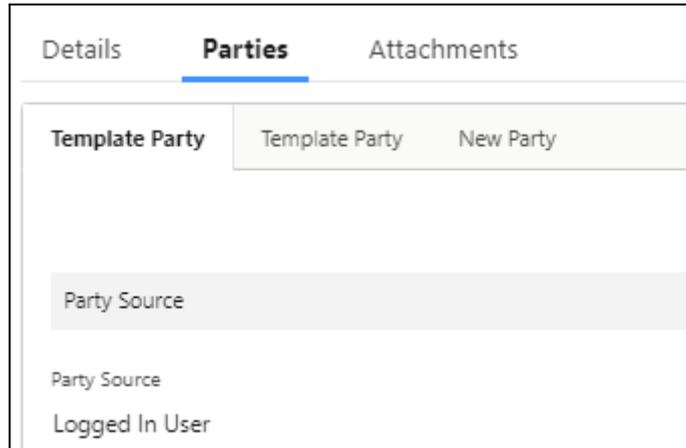
Field Mappings Add Field Mapping

Mapping Level	Salesforce O...	Salesforce Fi...	Scrive Field	Salesforce To...	Scrive To Sal...
---------------	-----------------	------------------	--------------	------------------	------------------

### 9.5.1 Party Source

'Party Source' section contains a dynamic form that defines the source for the Scrive Process Template Party:

- **Logged in User** - Party is based on the owner of the Scrive Account used for sending the Scrive Document. Option is used for Scrive Process Template's first party which is created by default and can't be removed. Source for the first party can't be changed.



- **Email**

- **Static** - Email address for Scrive Document Party is provided in an input field.

- **Merge** - Email address for Scrive Document Party is provided in an input field.

- **NOTE:** When Party Source is set to Email, name fields are optional for this party (signing party will not be asked to provide it during the signing process).

- **Email And Party**

- **Static** - Email address, First Name and Last Name for Scrive Document Party is provided in an input field.

- **Merge** - Email address, First Name and Last Name for Scrive Document Party is provided in an input field.

- **Record**

- **Merge** - If Source Object (on Process Template) and Scrive Document Party have lookup relationships to common objects, then Source Object lookup relationship fields to these common objects can be used as a Party Source with Type Merge.

Example 1

Having the following:

- Opportunity is selected as a Source Object on a Process Template

User can:

- Select the Party Source Merge field as Opportunity.OwnerId or Opportunity.ContactId because Opportunity has default lookup relationship fields to Contact and User and Scrive Document Party have also default lookup relationships to User and Contact.

Example 2:

Having the following:

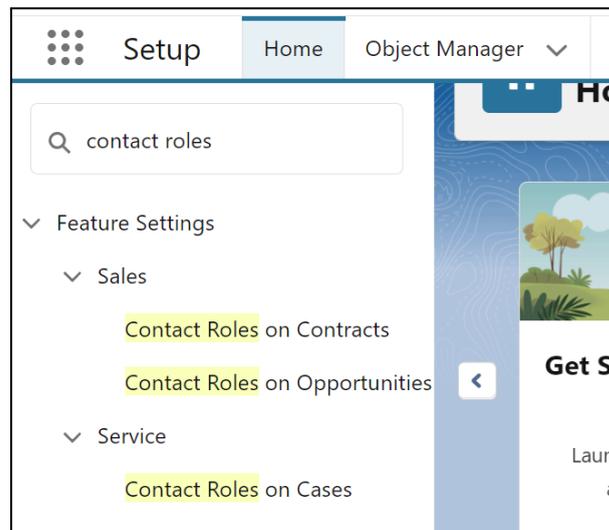
- Document Party has a lookup relation to a BusinessPerson object (DocumentParty\_\_c.BusinessPerson\_\_c),
- Source Object on a Process Template is selected as Opportunity,
- Opportunity Object has a lookup relationship field to the BusinessPerson object (Opportunity.BusinessPerson\_\_c)

User can:

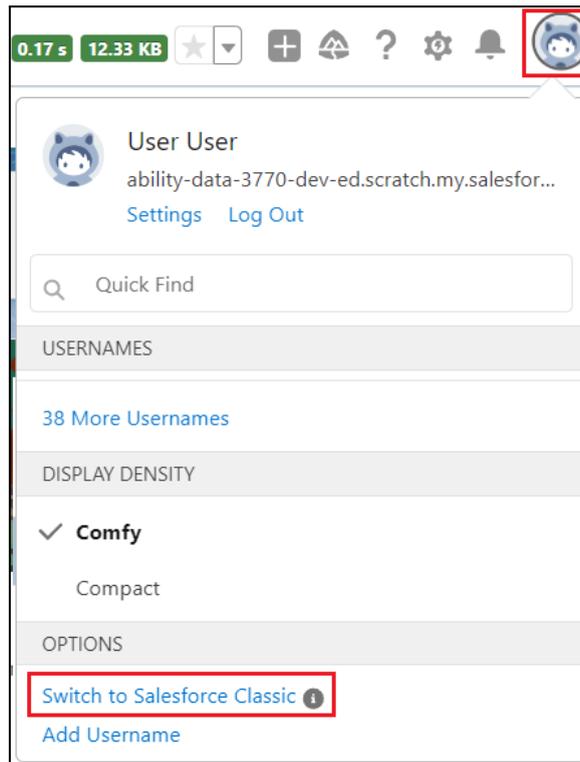
- Select additionally the Template Party Source with Type Merge as Opportunity.BusinessPerson\_\_c.

For more details regarding Document Related Record and Document Party Source Types check section: [Custom Object as a Source Record for the Scrive Document Party](#)

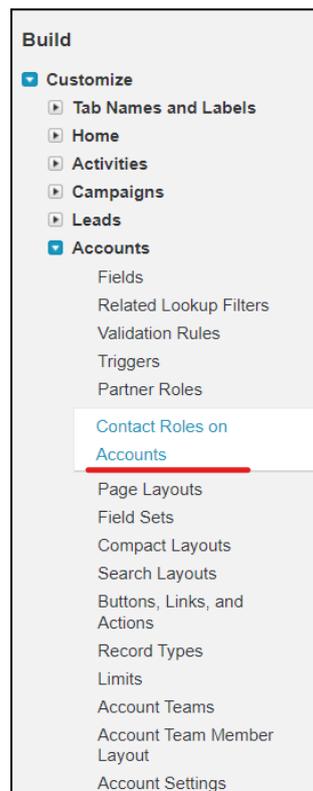
- **Contact Role** - available when 'Opportunity', 'Account', 'Case' or 'Contract' is selected as Source Object for the Scrive Process Template
  - List of Contact Roles defined on the SObject can be found in 'Setup > Contact Roles'. This option provides the possibility to point the Contact record as a source for the Party based on the older Contact Role record defined for an SObject record on which the Scrive Process Template is executed.



- Please note that for the Account SObject the package supports Account Contact Role not Account Contact Relationship (multi-select picklist). The Account Contact Roles can be set in the Salesforce Classic layout. To switch into Salesforce Classic user shall press it's user icon in the top right corner and than select 'Switch to Salesforce Classic'



In the Classic Setup user may find in Build | Customize | Accounts | Contact Roles.



and configure Account Contact Roles.

## Picklist Edit Account Contact Role

Below is the master list of picklist values for the Account Contact Role field.

Click Edit to change the name of the value or make it the default value. Click New to add a value to the picklist. Click Reorder

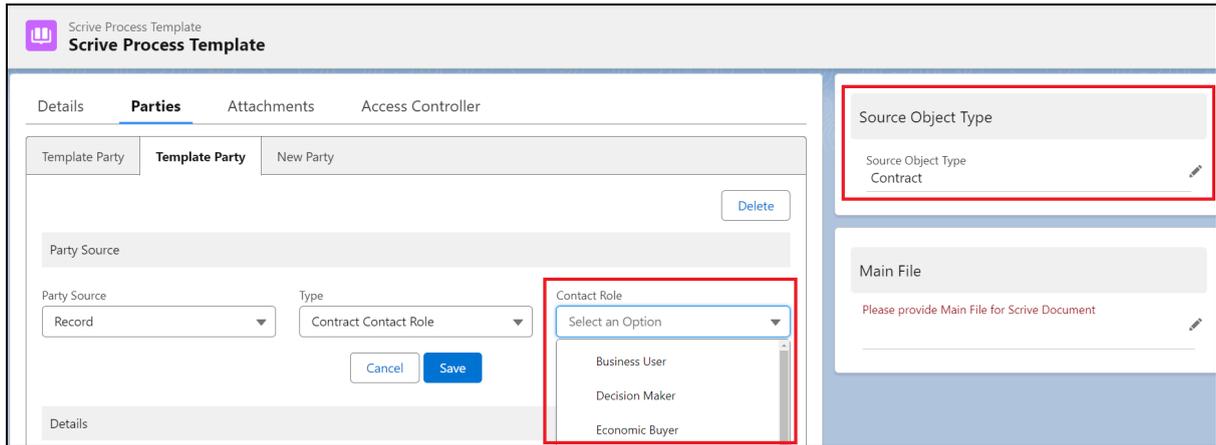
Account Contact Role Picklist Values				New	Reorder	Replace	Printable View	Chart Colors ▾
Action	Values	API Name	Default					
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Business User	Business User	<input type="checkbox"/>					
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Decision Maker	Decision Maker	<input type="checkbox"/>					
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Economic Buyer	Economic Buyer	<input type="checkbox"/>					
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Economic Decision Maker	Economic Decision Maker	<input type="checkbox"/>					
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Evaluator	Evaluator	<input type="checkbox"/>					
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Executive Sponsor	Executive Sponsor	<input type="checkbox"/>					
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Influencer	Influencer	<input type="checkbox"/>					
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Technical Buyer	Technical Buyer	<input type="checkbox"/>					
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Other	Other	<input type="checkbox"/>					

The Account Contact role can be created by using the enabled related Account Contact Roles list by pressing the 'New' button.

The screenshot shows a CRM interface for Burlington Textiles Corp of America. The top navigation bar includes 'Hide Feed', 'Click to add topics', and a 'Follow' button. Below this is a search bar and a 'Share' button. The main content area is divided into several sections:

- Account Detail:** A table of account information including Account Owner (User User), Account Name (Burlington Textiles Corp of America), Account Number (CD656092), and various other details like Industry (Apparel), Annual Revenue (\$350,000,000), and Billing Address (525 S. Lexington Ave, Burlington, NC 27215 USA).
- Contact Roles:** A section with a 'New' button and a note that there are no records to display.
- Contacts:** A table showing a single contact record for Jack Rogers, VP, Facilities, with email jprogers@burlington.com and phone (336) 222-7000.

- The Contact Roles picklist entries depend on the SObject selected as a Source Object Type.
  - Example of Contract Contact Roles is displayed in the picture below

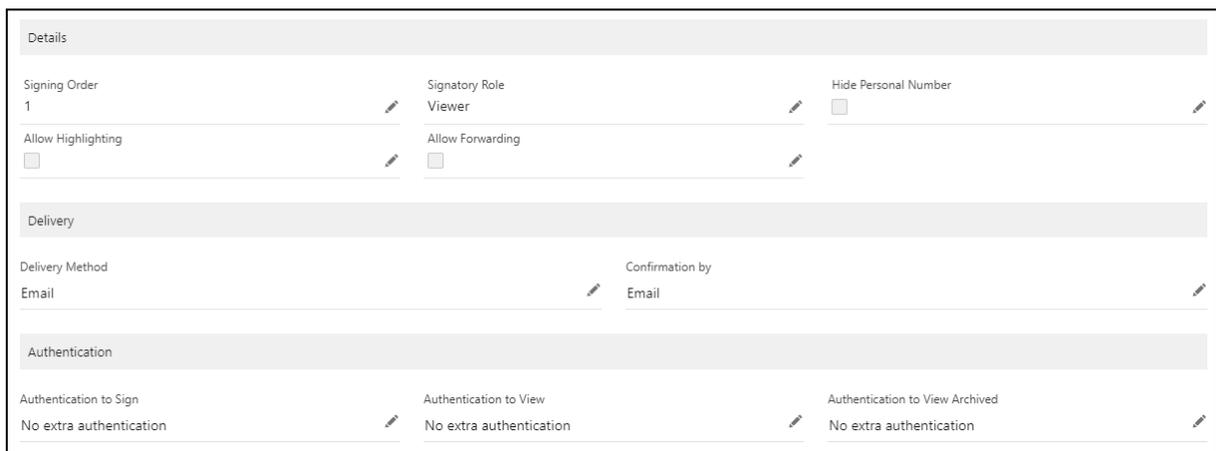


### 9.5.2 Details, Delivery, Authentication

'Details' section contains general information about the Scrive Process Template Party.

'Delivery' allows the user to select the method of delivering and the confirmation way for the document created from the Scrive Process Template.

'Authentication' section allows the user to enforce additional authentication to Sign or View the document created from the Scrive Process Template.



**Note:** The logic behind the 'Authentication' section enforces proper list and mixing of the methods based on Scrive Company Setup (more details: [Details, Delivery, Authentication](#)).

### 9.5.3 Request Attachments

'Request Attachments' section contains the table of Request Attachments defined for the specific Process Template Party. The section will be unavailable for the Logged In User (initiating party) and will be available only for Process Template Parties with Signatory Role set as "Signing Party". Name of the Request Attachment is unique within all Request Attachments of a particular Process Template record.

Authentication

Authentication to Sign

No extra authentication

Authentication to View

No extra authentication

Authentication to View Archived

No extra authentication

Party Request Attachments

[Add](#)

Name	Merge With Main File	Required	Description	
1 Consent Form		✓	Attach file with consent of processing your data	

Field Mappings

[Add Field Mapping](#)

Setting up and managing request attachments is exactly the same as for the Document Party Request Attachments. For details see [Request Attachments](#).

### 9.5.4 Field Mappings

'Field Mappings' section contains the table of related Field Mappings for Scrive Process Template Party. Table shows all applicable field mappings to the Scrive Process Template Party. "Salesforce to Scrive" and "Scrive to Salesforce" columns are editable and indicate if the specific direction of the mapping is activated. Only activated field mappings are used for the field mapping logic for documents created based on Scrive Process Template.

Field Mappings

[Add Field Mapping](#)

Mapping Level	Salesforce Object	Salesforce Field	Scrive Field		Salesforce To Scrive	Scrive To Salesforce		
1	Party	Contact	FirstName	name 1		✓	✓	
2	Party	Contact	LastName	name 2		✓	✓	
3	Party	Contact	Email	email		✓	✓	
4	Party	Contact	MobilePhone	mobile		✓	✓	
5	Party	Contact	ScriveSf_PersonalNu...	personal_number		✓	✓	
6	Party	User	FirstName	name 1		✓	✓	
7	Party	User	LastName	name 2		✓	✓	
8	Party	User	Email	email		✓	✓	
9	Party	User	MobilePhone	mobile		✓	✓	
10	Party	User	ScriveSf_PersonalNu...	personal_number		✓	✓	

The full functionality of the field mappings component is available when the 'Scrive Template' is selected for Main File source in the 'Main File' component. Otherwise, adding new field mapping and edit mode for field mappings are disabled. The 'Salesforce To Scrive' and 'Scrive To Salesforce' columns which point the directions of the mapping are still editable and those values trigger field mapping logic for documents created based on Scrive Process Template.

Field Mappings								
Mapping Level	Salesforce Object	Salesforce Field	Scrive Field		Salesforce To Sc...	Scrive To Salesf...		
1	Party	Contact	FirstName	name 1	↔	✓	✓	🗑️
2	Party	Contact	LastName	name 2	↔	✓	✓	🗑️
3	Party	Contact	Email	email	↔	✓	✓	🗑️

More information about Field Mappings are available in the [Global Field Mappings](#) section.

## 9.6 Attachments tab

'Attachments' tab contains the table with the list of attachments. 'New' button opens the popup form to define a new attachment. Attachments can be based on:

- From File - uploaded file

- Lightning File From Related Record (option available when related record is provided on a 'Related Record' component). From the Scrive Process Template context the Lightning Files from the related record are unknown. Because of that, 'Newest' and 'Oldest' options can be selected (newest or oldest Lightning File from related record based on a Created Date).

- Visualforce PDF Template - visual force page rendered as PDF in a context of related record (It might be used without related record)

Table contains general information about related attachments and the possibility to preview the content of each attachment. The attachment record can be edited or removed based on options from the dropdown list (arrow in the last column). Name of the Attachment is unique within all Attachments of a particular Process Template record.

For attachments based on Lightning File From Related Record the preview is unavailable.

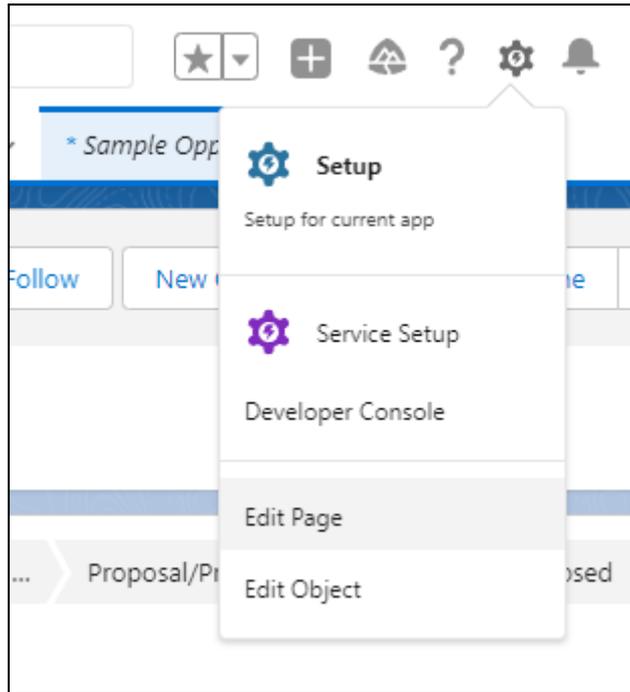
Name	Source Type	Created Date	
<a href="#">Attachment from file</a>	From File	Jun 29, 2021	<a href="#">preview</a> ▼
<a href="#">Attachment from VF page</a>	Visualforce PDF Template	Jun 29, 2021	<a href="#">preview</a> ▼
<a href="#">Attachment Lightning File from related record</a>	Lightning File From Related Record	Jun 29, 2021	<a href="#">preview</a> ▼

## 9.7 Start Scrive Process Template From Record

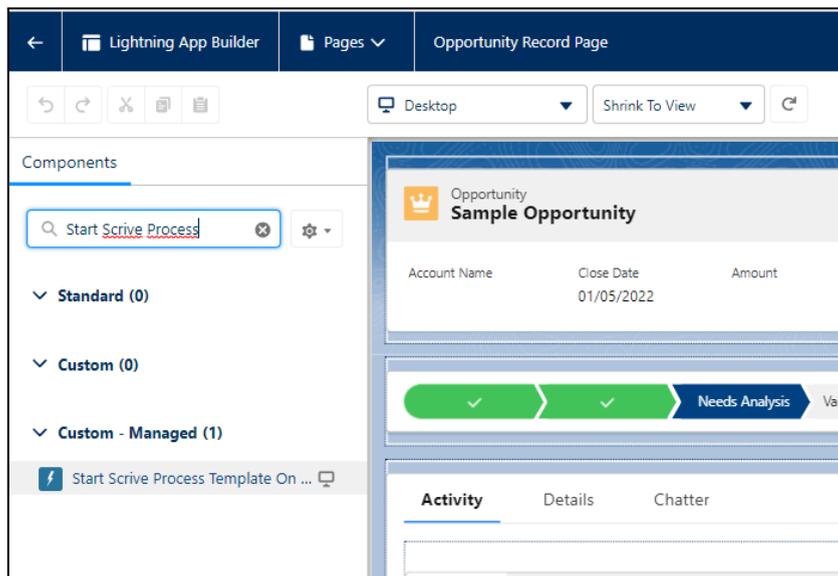
When the Scrive Process Template is already defined it's time to use it from the Salesforce record level. **“Start Scrive Process Template On Record”** lightning component should be used on a lightning record page to define a button that will trigger the Scrive Process Template execution in the context of the source record.

Process is presented for an Opportunity object, but the “Scrive Process Template From Record” lightning component can be placed on the lightning record page for any object that has a lookup relationship to the Scrive Document object.

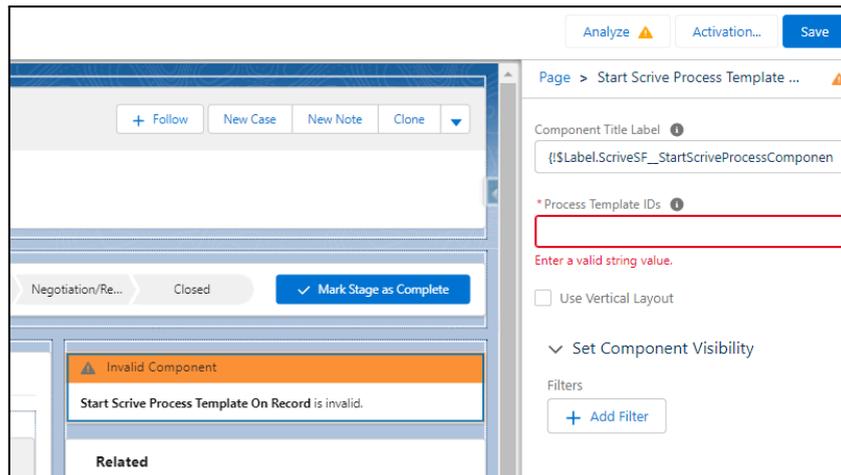
To use “Start Scrive Process Template On Record” lightning component should be placed on a lightning record page. Lightning record page can be edited using Gear Icon > “Edit Page” from the lightning record page or from Setup > Lightning App Builder.



“Start Scrive Process Template On Record” lightning component can be found in the “Custom - Managed” section and placed on a lightning record page (by drag-and-drop).

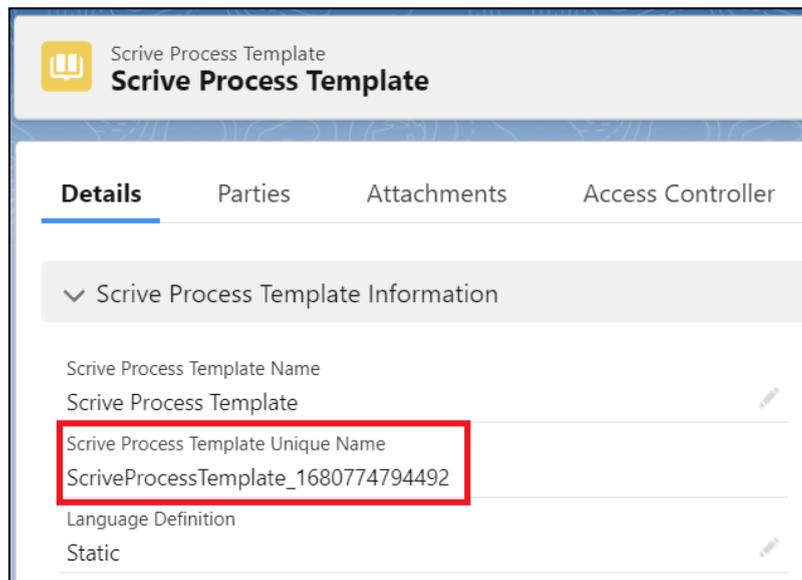


When the component is placed on a lightning page, it presents an “Invalid Component” warning because of a missing required parameter.

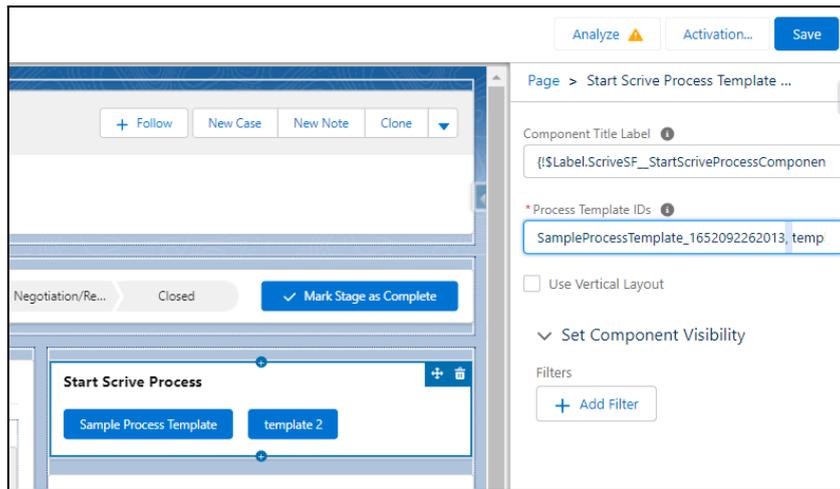


“Start Scrive Process Template On Record” lightning component’s parameters:

- **Component Title Label**
  - By default, it is set as a “ScriveSF\_\_StartScriveProcessComponentTitle” custom label to support translations, but it can be changed to a static value, other custom label or left empty.
- **Process Template IDs**
  - Required parameter,
  - Parameter collects unique names of Scrive Process Templates that have to be placed on a component. “Scrive Process Template Unique Name” can be found on a Scrive Process Template record.

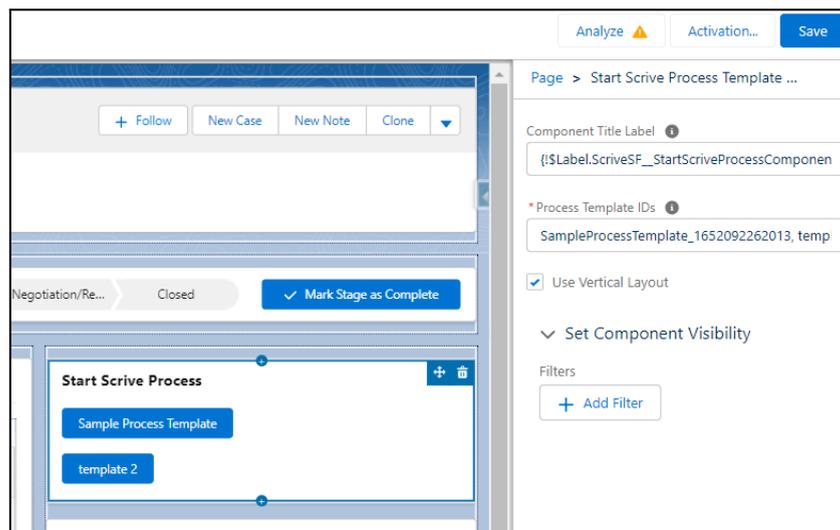


- If handling of multiple Scrive Process Templates is required, provide comma separated Scrive Process Templates Unique Names of multiple Scrive Process Template records.

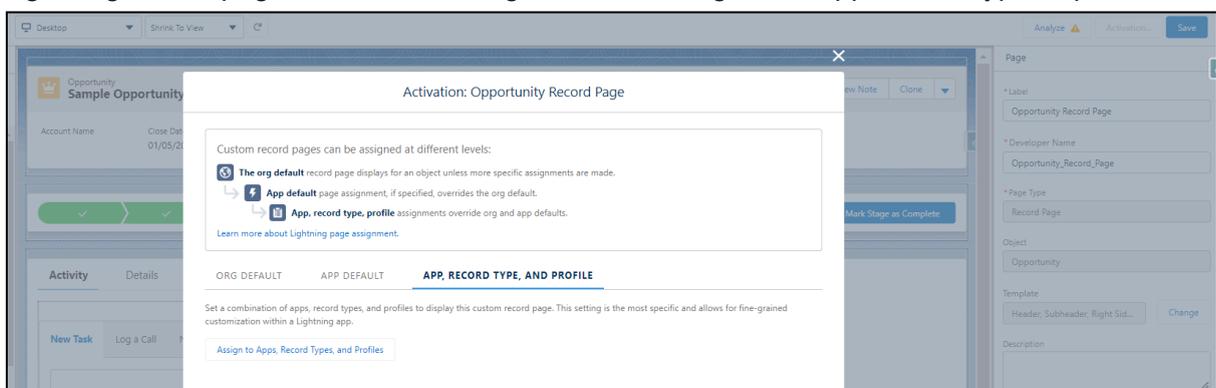


- **Use Vertical Layout**

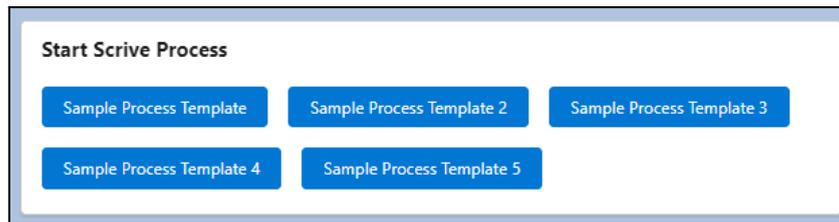
- By default, it is unchecked - Scrive Process Template buttons will be placed in a single row if possible.
- If it is checked, each Scrive Process Template button will be placed in a new row.



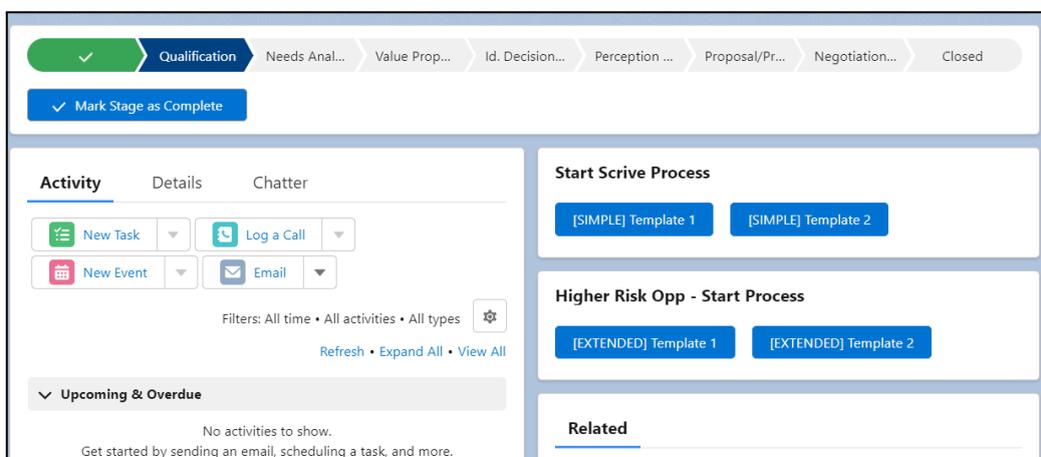
Lightning record page can be set as org default or assigned to app, record type or profile.



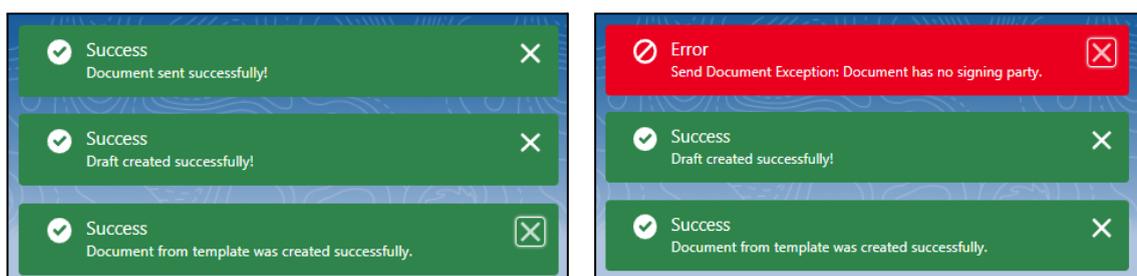
To execute the Scrive Process Template in the context of the current record, the button on a component has to be clicked.



Administrators may add several times the component and divide Process Templates into sections for better user experience.

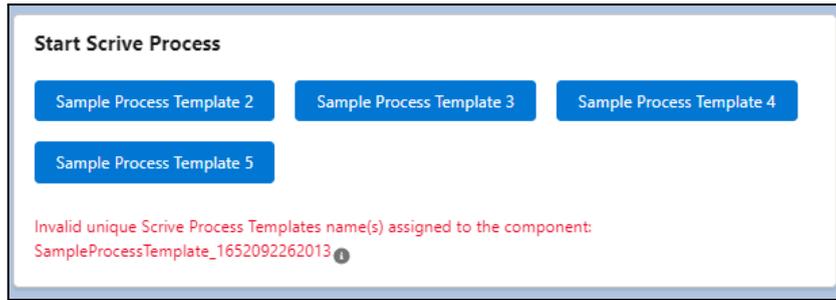


When the process will be started the process status messages will be printed as toasts. If the process will create a Scrive Document successfully, the logic will redirect to the Scrive Document record. Sample toast messages:



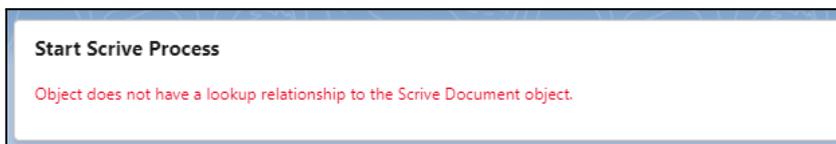
### 9.7.1 Troubleshooting

→ Invalid unique Scrive Process Template name(s) assigned to the component:



- ◆ Scrive Process Template with a provided unique name does not exist,
- ◆ Scrive Process Template with a provided unique name is related to a different source object (details: [Source Object](#)),
- ◆ The current user does not have access to the Scrive Process Template record.

→ Object does not have a lookup relationship to the Scrive Document

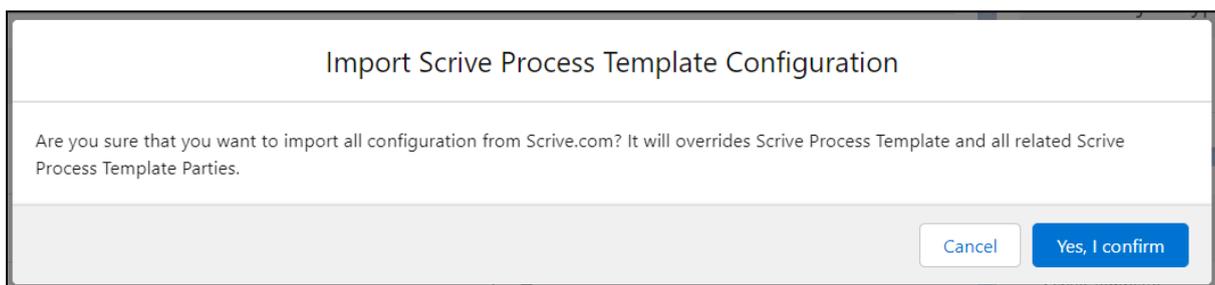


- ◆ Source object of the Lightning Record Page does not have a relationship to the Scrive Document object (it can be added to support Scrive Process Templates - details: [Custom Object as Related Record to Scrive Document](#))

## 9.8 Import Configuration From Scrive

When the Main File source for the Scrive Process Template is set to Scrive Template, 'Import Configuration From Scrive' button will appear on a headlight panel. When clicked, the setup from pointed Scrive Template will be pulled to the Scrive Process Template record (including general document setup and parties).

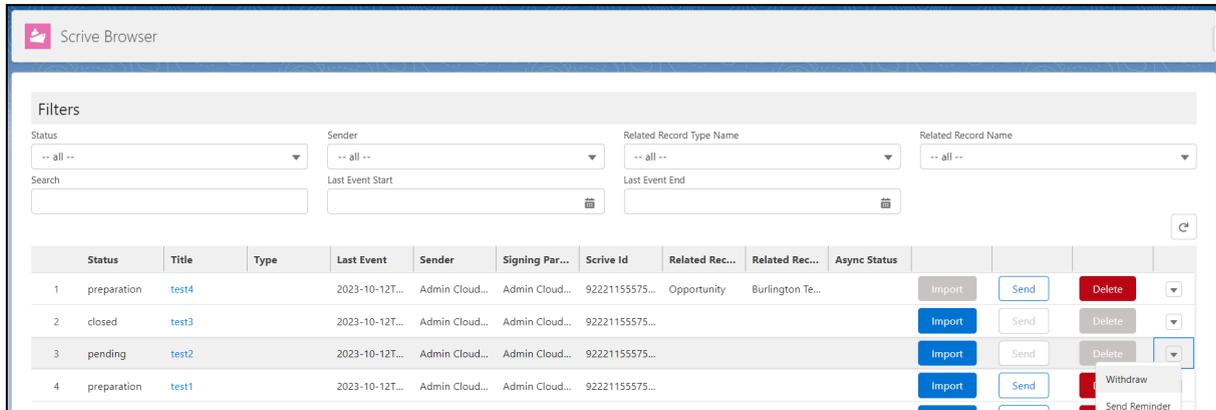
**Note:** the user has to be aware that the import of the configuration from scrive template will override current setup and must confirm the prompt message after pressing the button.



## 10. Scrive Browser

Scrive Browser is a tool that presents a list of Scrive Documents available in the context of Scrive Account related to the current SF User - it means that the list contains also Scrive

Documents that are not represented by SF records on the current instance (for those documents there is an “Import” option to save them as SF records). Some actions can be executed directly from the Scrive Browser table (list of available actions depend on the current status of the given Scrive Document).



**Note:** Scrive Browser presents a list of available Scrive Documents so it means that *Standard* (“Standard” Role on Scrive User) user will see only Scrive Documents that are owned by this user, but *Admin* (“Admin” Role on Scrive User) user will see all Scrive Documents in the organisation. Scrive User Role for the specific user can be changed on [scrive.com](https://scrive.com) portal in “Account” -> “Users and Groups” section by Admin Scrive User.

## 10.1 Load More Data

To ensure the best performance of the Scrive Browser, by default only 100 Scrive Documents are loaded, but if needed another 100 Scrive Documents can be loaded with “Load More Data” action (placed under the Scrive Browser table). Action can be repeated multiple times to load a larger amount of Scrive Document records to the table.

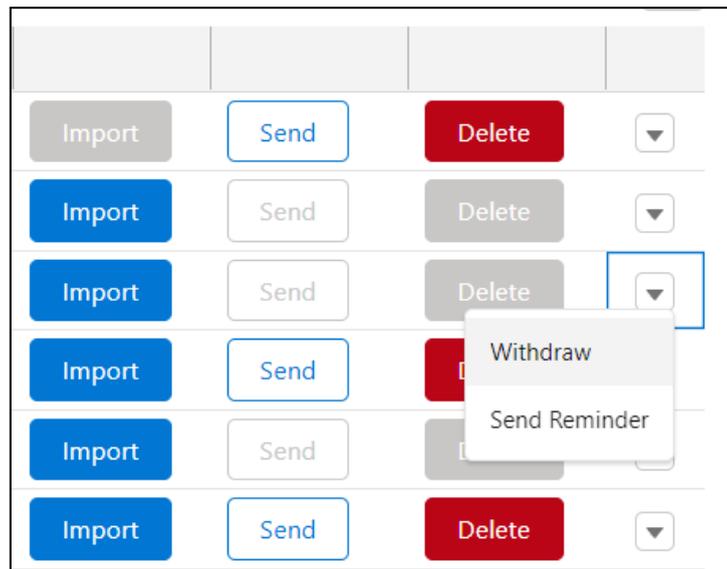
## 10.2 Filters

The list of the Scrive Documents can be filtered by various parameters to make searching for the specific document easier. By default, the list contains 100 Scrive Documents and with “Load More Data” action more documents can be loaded. This approach ensures the best performance of the Scrive Browser. It is important to acknowledge that filters are only applied to the loaded Scrive Documents. It might happen that after filter application the list will be empty because none record from loaded 100 Scrive Documents fulfils the filter conditions and after click on “Load More Data” some records will appear (as additional 100 Scrive Documents will be loaded and some of them will fulfil the filter conditions).

Additionally, specific columns from the Scrive Browser table can be sorted.

## 10.3 Actions

Some actions can be executed on the Scrive Document directly from the Scrive Browser table. List of available actions depends on the status of the Scrive Document. The most important actions like *Import*, *Send* and *Delete* are available in the right columns of the table. More specific actions like Send Reminder, Withdraw, Prolong, Restart and Forward are available in row actions (arrow icon from the last column).

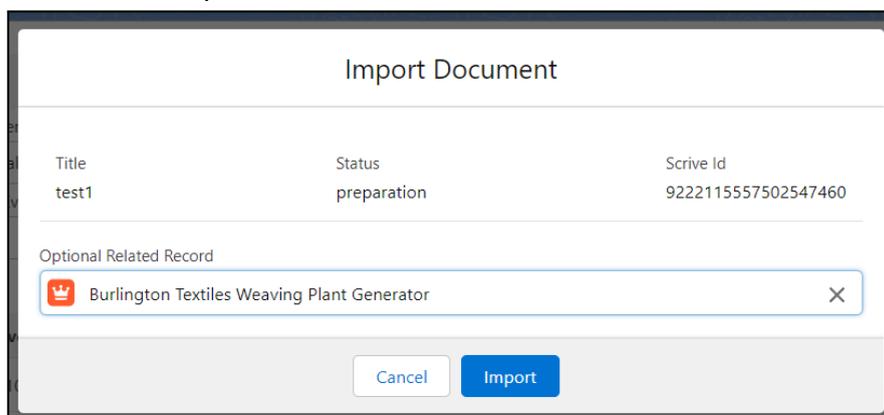


Import	Send	Delete	▼
Import	Send	Delete	▼
Import	Send	Delete	▼
Import	Send	Withdraw	▼
Import	Send	Send Reminder	▼
Import	Send	Delete	▼

Most of the mentioned actions are described in the [Scrive Document](#) section, but [Import action](#) requires additional explanation.

### 10.3.1 Import

*Import* action is available only for Scrive Documents that don't have SF records in the current organisation. This action creates records that represent imported Scrive Document in Salesforce. Optionally, during the *Import* process the user can select a SF record that should be related to the imported Scrive Document.



### Import Document

Title	Status	Scrive Id
test1	preparation	9222115557502547460

Optional Related Record

 Burlington Textiles Weaving Plant Generator ×

Imported Scrive Document will be related to pointed SF record and Main File will be set to “Imported” value.

Scrive Document  
test1

Update Draft Send Remove Pages Refresh Open in Scrive Delete

Scrive Document Name: ScriveDoc-4 Status: Preparation Language: English

Details Parties Attachments Events

Information

Title: test1 Days To Sign: 1

Language: English Days to Remind:

Messages

Related Record

Opportunity: Burlington Textiles Weaving Plant Generator

Main File

Imported from Scrive.com  
Imported

**Note:** Scrive Browser allows to import Scrive Document one-by-one, but it is possible to import more records with the [Mass Import](#) feature.

## 10.4 Troubleshooting

→ Table is not visible and “Logged In User does not have Scrive User Permission Set or Scrive Standard Api Credentials” error message is visible:

Scrive Browser

Logged In User does not have Scrive User Permission Set or Scrive Standard Api Credentials

No records available

- ◆ Current user is missing Scrive User permission.
- Expected Scrive Document is not on the Scrive Browser list
  - ◆ Scrive User related to the current SF User does not have access to given document,
  - ◆ Expected Scrive Document was not present in the initial batch of loaded Scrive Documents - “Load More Data” button on the bottom of the table should be used to load more Scrive Documents (more details: [Load More Data](#)).
- Action is not available for the specific Scrive Document from the Scrive Browser list:
  - ◆ List of available actions depends on the status of the document e.g. Scrive Document that is already closed can’t be sent again or withdrawn.
- “Document Import: SF User corresponding to the original initiating Scrive User does not exist. Initiating SF User was set to the SF user that imported the Scrive Document.” warning on an imported Scrive Document record.

- ◆ This warning appears when the user with Scrive Admin Role imported a Scrive Document owned by another Scrive User that is not connected to any SF user. Warning can be ignored for Scrive Documents that are “closed”, but it is important to acknowledge that Scrive Document in “preparation” status with this warning is initiated by other user than SF record owner and if the document will be send from SF, all parties in the process will see the original Scrive User that initiated Scrive Document - not the Scrive User that is connected to the SF user that actually clicked ‘Send’ in SF.

## 11. Custom Development

Scrive Package gives an opportunity to define own custom logic based on a Scrive Global class that exposes action methods and self build Document, Parties and Attachments records. This is a great flexibility to ensure that the very specific process, that is not possible with the out of the box functionality, can be supported by Scrive in Salesforce.

### 11.1 Self build of Scrive Document records

Scrive Document representation in SF is based on Scrive Document, Scrive Document Party and Scrive Document Attachment objects.

- The main Salesforce record that defines a document is Scrive Document (ScriveSf\_\_Document\_\_c) record that stores general settings, related record and main file definition.
- Parties are represented by Scrive Document Party (ScriveSf\_\_DocumentParty\_\_c) records related to the document record. Object contains general setting and party source definition. **Important note:** First party that represents the document creator ('Logged in User') is generated automatically on Scrive Document creation.
- Document attachments are represented by Scrive Document Attachment (ScriveSf\_\_DocumentAttachment\_\_c) records related to the document record. Object contains a name and attachment source definition.

**Note:** This section shows how to prepare a Scrive Document record, but to perform any action on the document, [ScriveGlobal](#) methods have to be executed.

#### 11.1.1 Scrive Document record definition

Definition of the Scrive Document record might be based on the below described sample code (detailed sample with fields that should be considered for Scrive Document definition):

```
ScriveSf__Document__c document = new ScriveSf__Document__c(
    // Information
    ScriveSf__Title__c = 'Sample Document Title', // if not provided, the default name will be pulled
                                                // from 'DefaultScriveDocumentName' custom label
```

```

ScriveSf__DaysToRemind__c = 2, // by default not provided
ScriveSf__DaysToSign__c = 7, // if not provided, the default value provided in Scrive Settings (in 'Admin panel') will be populated
ScriveSf__Language__c = 'en', // 'en' is a default value

// Messages
ScriveSf__ConfirmationMessage__c = 'sample confirmation message', // by default not provided
ScriveSf__InvitationMessage__c = 'sample invitation message', // by default not provided

// Signing Page Settings
ScriveSf__IsReceipt__c = false, // by default 'false'
ScriveSf__AllowRejectionComment__c = true, // by default 'true'
ScriveSf__ShowAutoScrollArrow__c = true, // by default 'true'
ScriveSf__ShowFooter__c = true, // by default 'true'
ScriveSf__ShowHeader__c = true, // by default 'true'
ScriveSf__ShowPdfLink__c = true, // by default 'true'
ScriveSf__ShowRejectButton__c = true, // by default 'true'

// Attachments
ScriveSf__OverrideExistingAttachments__c = false, // by default 'false', if set to 'true' existing attachments on
// a scrive document (on a scrive.com record) will be overridden

// Related Record
ScriveSf__Opportunity__c = 'OPPORTUNITY_ID', // sample related record - can be replaced by custom lookup relationship
// (check 'Custom Object as Related Record to Scrive Document' section)

// Main File
ScriveSf__SourceDocumentType__c = 'Visualforce PDF Template', // available options:
// 'Scrive Template', 'From File',
// 'Visualforce PDF Template', 'Lightning File From Related Record'
ScriveSf__SourceDocumentRelatedRecordLightningFile__c = 'CONTENT_DOCUMENT_ID_FROM_RELATED_RECORD_ID',
// has to be provided when
// ScriveSf__SourceDocumentType__c = 'Lightning File From Related Record'
ScriveSf__SourceDocumentScriveTemplateId__c = 'SCRIVE_TEMPLATE_ID',
// has to be provided when ScriveSf__SourceDocumentType__c = 'Scrive Template'
ScriveSf__SourceDocumentScriveTemplateName__c = 'SCRIVE_TEMPLATE_NAME',
// has to be provided when ScriveSf__SourceDocumentType__c = 'Scrive Template'
ScriveSf__SourceDocumentUploadedFileId__c = 'CONTENT_DOCUMENT_ID',
// has to be provided when ScriveSf__SourceDocumentType__c = 'From File'
ScriveSf__SourceDocumentVisualforcePageId__c = 'VISUALFORCE_PAGE_ID'
// has to be provided when
// ScriveSf__SourceDocumentType__c = 'Visualforce PDF Template'
);
insert document;

```

### 11.1.2 Scrive Document Party record definition

**Note: First party is created automatically when the document record is created. It is a 'Logged in User' (Scrive User) marked as a viewer with a signing order set to 1. If required to edit the setup for the first party, it has to be queried and updated in the code.**

Definition of the Scrive Document Party record might be based on the below described sample code (detailed sample with fields that should be considered for Scrive Document Party definition):

```

ScriveSf__DocumentParty__c party = new ScriveSf__DocumentParty__c(
    // General
    ScriveSf__Document__c = document.Id,

    // Party Source
    ScriveSf__PartySource__c = 'Record', // available options: 'Email', 'Record' (additional 'Logged In User' option - valid only
        // for the first party that is created automatically on ScriveSf__Document__c record creation)
    ScriveSf__Type__c = 'ScriveSf__Contact__c', // if ScriveSf__PartySource__c = 'Record': lookup field API Name from ScriveSf__Document__c
        // object that points to source record for the party - e.g. 'ScriveSf__Contact__c' or 'ScriveSf__User__c'
        // if ScriveSf__PartySource__c = 'Email': 'Static'
    ScriveSf__Email__c = 'sample.email@scrive.com', // has to be provided if ScriveSf__PartySource__c = 'Email'

    // Related Record - custom relationship can be defined (check 'Custom Object as a Source Record for the Scrive Document Party' section)
    // ScriveSf__PartySource__c = 'Record' and ScriveSf__Type__c = 'API Name of custom lookup relationship on a ScriveSf__Document__c object'
    ScriveSf__Contact__c = 'CONTACT_ID', // has to be provided if ScriveSf__PartySource__c = 'Record' and ScriveSf__Type__c = 'ScriveSf__Contact__c'
    ScriveSf__User__c = 'USER_ID', // has to be provided if ScriveSf__PartySource__c = 'Record' and ScriveSf__Type__c = 'ScriveSf__User__c'

    // Details
    ScriveSf__SigningOrder__c = 1, // by default set to 1
    ScriveSf__SignatoryRole__c = 'signing_party', // available options: 'viewer', 'signing_party', 'approver', 'hidden_approver'
    ScriveSf__HidePersonalNumber__c = false, // by default 'false'
    ScriveSf__AllowForwarding__c = false, // by default 'false'
    ScriveSf__AllowHighlightning__c = false, // by default 'false'

    // Delivery
    ScriveSf__DeliveryMethod__c = 'email', // by default set to 'email' - available options depends on what is enabled for the organisation
    ScriveSf__ConfirmationBy__c = 'email', // by default set to 'email' - available options depends on what is enabled for the organisation

    // Authentication
    ScriveSf__AuthenticationToSign__c = 'standard', // by default set to 'standard' (No extra authentication) - available options
        // depends on what is enabled for the organisation
    ScriveSf__AuthenticationToView__c = 'standard', // by default set to 'standard' (No extra authentication) - available options
        // depends on what is enabled for the organisation
    ScriveSf__AuthenticationToViewArchived__c = 'standard' // by default set to 'standard' (No extra authentication) - available options
        // depends on what is enabled for the organisation
);

insert party;

```

### 11.1.3 Scrive Document Attachment record definition

Definition of the Scrive Document Attachment record might be based on the below described sample code (detailed sample with fields that should be considered for Scrive Document Attachment definition):

```

ScriveSf__DocumentAttachment__c attachment = new ScriveSf__DocumentAttachment__c(
    // General
    ScriveSf__Document__c = document.Id,
    Name = 'Sample Attachment Name',

    // Attachment Source
    ScriveSf__SourceType__c = 'From File', // available options: 'From File', 'Lightning File From Related Record', 'Visualforce PDF Template'
    ScriveSf__SourceRelatedRecordLightningFile__c = 'CONTENT_DOCUMENT_ID_FROM_RELATED_RECORD_ID',
        // has to be provided when
        // ScriveSf__SourceType__c = 'Lightning File From Related Record'
    ScriveSf__SourceUploadedFileId__c = 'CONTENT_DOCUMENT_ID', // has to be provided when ScriveSf__SourceType__c = 'From File'

```

```
    ScriveSf__SourceVisualforcePageId__c = 'VISUALFORCE_PAGE_ID' // has to be provided when ScriveSf__SourceType__c = 'Visualforce PDF
Template'
);
insert attachment;
```

### 11.1.4 Code Samples - Scrive Document definition

- Document with main file from Scrive Template, 2 parties (author - viewer and signing party based on Contact record) and 1 uploaded attachment

```
String scriveTemplateId = '...';
String scriveTemplateName = '...';

ScriveSf__Document__c document = new ScriveSf__Document__c(
    ScriveSf__Title__c = 'Sample Document Title',
    ScriveSf__DaysToSign__c = 7,

    ScriveSf__SourceDocumentType__c = 'Scrive Template',
    ScriveSf__SourceDocumentScriveTemplateId__c = scriveTemplateId,
    ScriveSf__SourceDocumentScriveTemplateName__c = scriveTemplateName
);

insert document;

// First Party is already created on 'insert document' - no need for any modification

Id contactId = '...';

ScriveSf__DocumentParty__c party2 = new ScriveSf__DocumentParty__c(
    ScriveSf__Document__c = document.Id,

    ScriveSf__PartySource__c = 'Record',
    ScriveSf__Type__c = 'ScriveSf__Contact__c',
    ScriveSf__Contact__c = contactId,

    ScriveSf__SignatoryRole__c = 'signing_party'
);

insert party2;

Id uploadedFileContentDocumentId = '...';

ScriveSf__DocumentAttachment__c attachment = new ScriveSf__DocumentAttachment__c(
    ScriveSf__Document__c = document.Id,
    Name = 'Sample Attachment Name',

    ScriveSf__SourceType__c = 'From File',
    ScriveSf__SourceUploadedFileId__c = uploadedFileContentDocumentId
);

insert attachment;
```

- Document with related Opportunity, main file from Lightning File From Related Record, 2 parties (author - signing party and signing party based on User record with signing order set to 2) and 1 attachment based on Visualforce Page

```

Id opportunityId = '...';
Id contentDocumentIdFromRelatedOpportunity = '...';

ScriveSf__Document__c document = new ScriveSf__Document__c(
    ScriveSf__Title__c = 'Sample Document Title',
    ScriveSf__DaysToSign__c = 7,

    ScriveSf__Opportunity__c = opportunityId,

    ScriveSf__SourceDocumentType__c = 'Lightning File From Related Record',
    ScriveSf__SourceDocumentRelatedRecordLightningFile__c = contentDocumentIdFromRelatedOpportunity
);

insert document;

// First Party has to be updated (role: 'viewer' -> 'signing_party')
ScriveSf__DocumentParty__c party1 = [SELECT Id FROM ScriveSf__DocumentParty__c WHERE ScriveSf__Document__c = :document.Id];
party1.ScriveSf__SignatoryRole__c = 'signing_party';
update party1;

Id userId = '...';

ScriveSf__DocumentParty__c party2 = new ScriveSf__DocumentParty__c(
    ScriveSf__Document__c = document.Id,

    ScriveSf__PartySource__c = 'Record',
    ScriveSf__Type__c = 'ScriveSf__User__c',
    ScriveSf__User__c = userId,

    ScriveSf__SigningOrder__c = 2,
    ScriveSf__SignatoryRole__c = 'signing_party'
);

insert party2;

Id visualforcePagelId = '...';

ScriveSf__DocumentAttachment__c attachment = new ScriveSf__DocumentAttachment__c(
    ScriveSf__Document__c = document.Id,
    Name = 'Sample Attachment Name',

    ScriveSf__SourceType__c = 'Visualforce PDF Template',
    ScriveSf__SourceVisualforcePagelId__c = visualforcePagelId
);

insert attachment;

```

- Document with related Opportunity record, main file based on uploaded file, 2 parties (author - viewer and signing party based on Static email) and 1 attachment based on Lightning File From Related Record

```

Id opportunityId = '...';
Id uploadedContentDocumentId = '...';

ScriveSf__Document__c document = new ScriveSf__Document__c(
    ScriveSf__Title__c = 'Sample Document Title',
    ScriveSf__DaysToSign__c = 7,

    ScriveSf__Opportunity__c = opportunityId,

    ScriveSf__SourceDocumentType__c = 'From File',
    ScriveSf__SourceDocumentUploadedFileId__c = uploadedContentDocumentId
);

insert document;

// First Party is already created on 'insert document' - no need for any modification

String emailAddress = '...';

ScriveSf__DocumentParty__c party2 = new ScriveSf__DocumentParty__c(
    ScriveSf__Document__c = document.Id,

    ScriveSf__PartySource__c = 'Email',
    ScriveSf__Type__c = 'Static',
    ScriveSf__Email__c = emailAddress ,

    ScriveSf__SignatoryRole__c = 'signing_party'
);

insert party2;

Id contentDocumentIdFromRelatedOpportunity = '...';

ScriveSf__DocumentAttachment__c attachment = new ScriveSf__DocumentAttachment__c(
    ScriveSf__Document__c = document.Id,
    Name = 'Sample Attachment Name',

    ScriveSf__SourceType__c = 'Lightning File From Related Record',
    ScriveSf__SourceRelatedRecordLightningFile__c = contentDocumentIdFromRelatedOpportunity
);

insert attachment;

```

- Document with main file based on visualforce page , 2 parties (author - viewer and signing party based on Static email)

```

Id visualforcePageId = '...';

ScriveSf__Document__c document = new ScriveSf__Document__c(
    ScriveSf__Title__c = 'Sample Document Title',
    ScriveSf__DaysToSign__c = 7,

    ScriveSf__SourceDocumentType__c = 'Visualforce PDF Template',
    ScriveSf__SourceDocumentVisualforcePageId__c = visualforcePageId
);

insert document;

```

```
// First Party is already created on 'insert document' - no need for any modification
```

```
String emailAddress = '...';

ScriveSf__DocumentParty__c party2 = new ScriveSf__DocumentParty__c(
    ScriveSf__Document__c = document.Id,

    ScriveSf__PartySource__c = 'Email',
    ScriveSf__Type__c = 'Static',
    ScriveSf__Email__c = emailAddress ,

    ScriveSf__SignatoryRole__c = 'signing_party'
);

insert party2;
```

## 11.2 ScriveGlobal class

ScriveGlobal class exposes action methods that might be performed on a Scrive Document record (detailed description on how to build Scrive Document SF record can be found on [Self build of Scrive Document records](#) section). It gives a possibility to execute the logic from the quick actions on a Scrive Document record from the code. Here is the list of available actions:

- createDraft(Id documentId)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),
  - *Output:* ScriveSf\_\_Document\_\_c record
- deleteDocument(Id documentId)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),
  - *Output:* void
- forwardDocument(Id documentId, String emailAddress)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),
  - *Parameter:* emailAddress (email address of the recipient),
  - *Output:* ScriveSf\_\_Document\_\_c record
- prolongDocument(Id documentId, Integer numberOfDays)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),
  - *Parameter:* numberOfDays (number of days of prolonging),
  - *Output:* ScriveSf\_\_Document\_\_c record
- refreshDocument(Id documentId)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),
  - *Output:* ScriveSf\_\_Document\_\_c record
- removePages(Id documentId, Set<Integer> pagesToRemove)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),

- *Parameter:* pagesToRemove (set of page numbers for removal from the main document),
- *Output:* ScriveSf\_\_Document\_\_c record
  
- restartDocument(Id documentId)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),
  - *Output:* ScriveSf\_\_Document\_\_c record
  
- sendDocument(Id documentId)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),
  - *Output:* ScriveSf\_\_Document\_\_c record
  
- sendReminder(Id documentId)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),
  - *Output:* ScriveSf\_\_Document\_\_c record
  
- updateDraft(Id documentId)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),
  - *Output:* ScriveSf\_\_Document\_\_c record
  
- withdrawDocument(Id documentId)
  - *Parameter:* documentId (Salesforce Id of the Scrive Document),
  - *Output:* ScriveSf\_\_Document\_\_c record
  
- createFromProcessTemplate(Id templateId, Id recordId)
  - *Parameter:* templateId (Salesforce Id of the source Scrive Process Template),
  - *Parameter:* recordId (Salesforce Id of the source record),
  - *Output:* ScriveSf\_\_Document\_\_c record
  - **NOTE:** ScriveSf\_\_Document\_\_c record returned from this method is a Salesforce record (always in status 'New' despite the used Scrive Process Template setup) that does not have representation in Scrive service. To create a draft or send a document another method has to be executed in a separate APEX thread. If the methods will be executed in the same thread the exception will be thrown ("You cannot perform a DML operation prior to a callout").

**Note:** Most of the above actions can be executed on the Scrive Document only if the document status is valid. E.g. document in Preparation status (Draft) can't be restarted or withdrawn because it's not yet sent. In case of invalid execution the exception will be returned.

Sample usage of the ScriveGlobal class:

- create a draft of the Scrive Document with provided Id:



```
Id documentId = '...';

ScriveSf.ScriveGlobal service = new ScriveSf.ScriveGlobal();
ScriveSf__Document__c document = service.createDraft(documentId );
```

- send the Scrive Document with provided Id:

```
Id documentId = '...';

ScriveSf.ScriveGlobal service = new ScriveSf.ScriveGlobal();
ScriveSf__Document__c document = service.sendDocument(documentId );
```

- withdraw the Scrive Document with provided Id:

```
Id documentId = '...';

ScriveSf.ScriveGlobal service = new ScriveSf.ScriveGlobal();
ScriveSf__Document__c document = service.withdrawDocument(documentId );
```

- Forward the Scrive Document with provided Id:

```
Id documentId = '...';
String emailAddress = '...';

ScriveSf.ScriveGlobal service = new ScriveSf.ScriveGlobal();
ScriveSf__Document__c document = service.forwardDocument(documentId, emailAddress);
```

## 11.3 Mass Import

The ImportService class can be used by a Scrive Admin to asynchronously [import](#) multiple documents from Scrive to Salesforce. Imported documents can be related to existing Salesforce records.

To import documents, the user needs to prepare Scrive Document Ids and run the following code in the Developer Console:

```
Map<String, Id> scriveDocumentIdToRelatedRecordId = new Map<String, Id>();

//repeat the below line for every document without related record
scriveDocumentIdToRelatedRecordId.put('Scrive document Id', null);

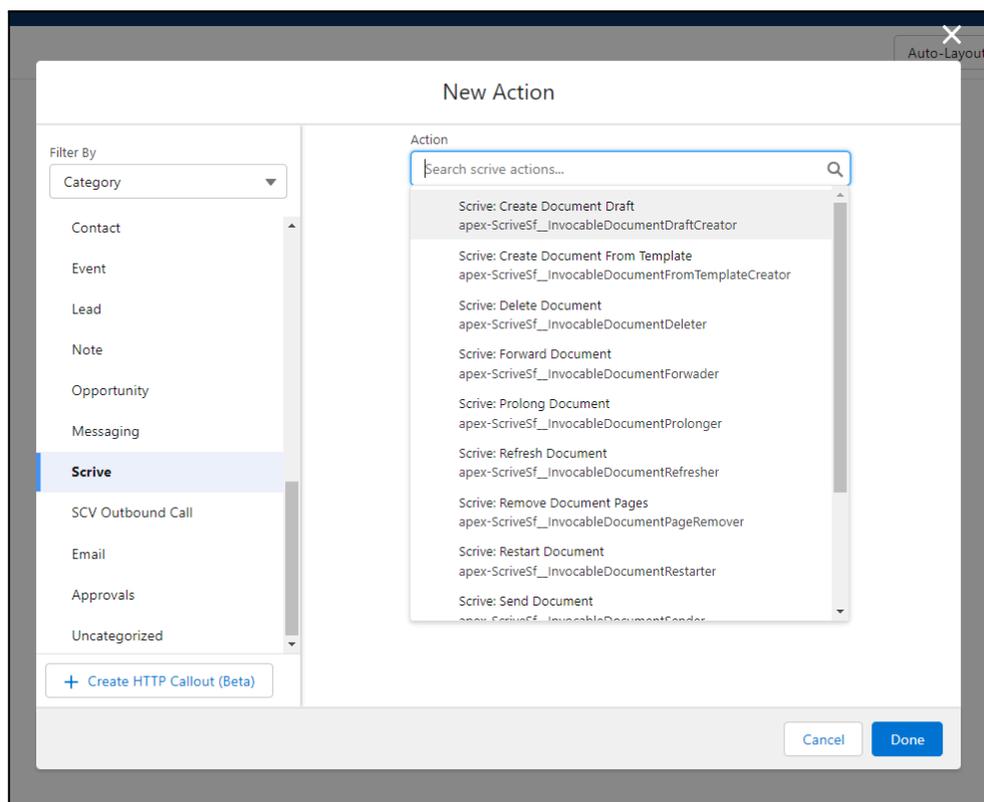
//repeat the below line for every document with related record
scriveDocumentIdToRelatedRecordId.put('Scrive document Id', 'related Salesforce record Id');

ScriveSf.ImportService massImportService = new ScriveSf.ImportService();
massImportService.asyncMassDocumentImport(scriveDocumentIdToRelatedRecordId);
```

In case of any errors, a notification email will be sent to the admin email address specified in [General Settings](#).

## 11.4 Invocable methods for ScriveGlobal

The Scrive 2.0 package has been empowered with the capability to utilise ScriveGlobal methods with the Salesforce Flows. There is no need to write code in order to use the functionality of the Scrive 2.0 package for custom processes. The Scrive Invocable Actions can be easily found when the user filters actions by 'Category' and selects 'Scrive' category.

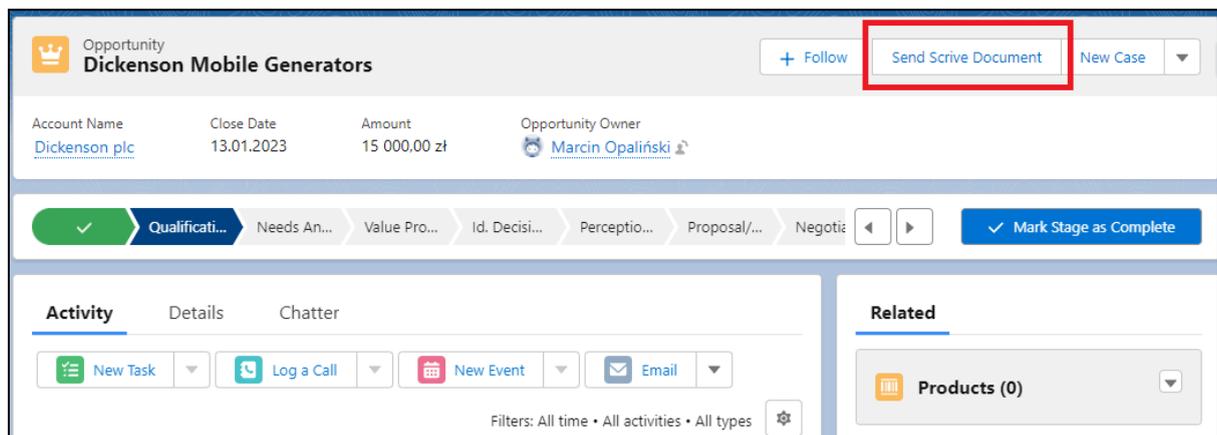


The user may create any flow and use the Scrive Invocable action to:

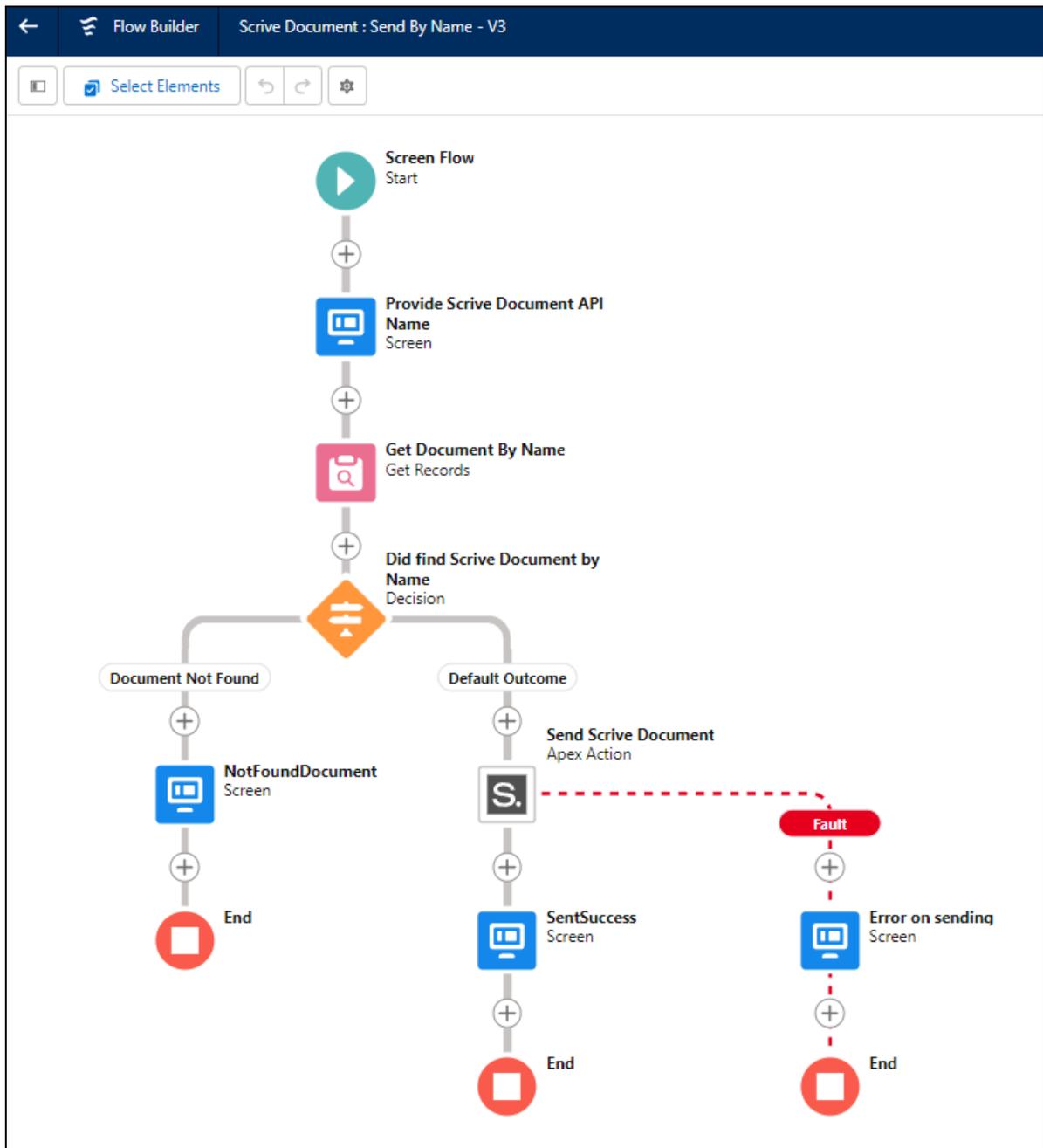
- Create/Update Draft Document,
- Create Document from Process Template and Source Record,
- Delete Document,
- Forward Document to provided email,
- Prolong Document by Number of Days,
- Refresh Document,
- Remove Selected Pages From the Document,
- Restart Document,
- Send Document,
- Send Reminder,
- Withdraw Document.

In order to present functionality of the Scrive Invocable methods, the two examples have been created.

The first example is a simple screen flow which can be opened from any layout which contains an Action Button with the defined flow. Picture below presents an Action Flow Button added to an Opportunity layout.



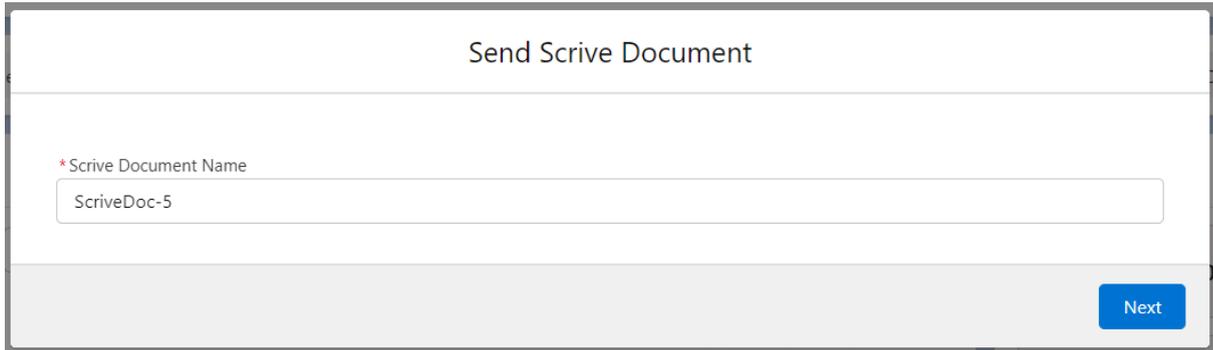
The Flow Diagram below has the first screen element that requires a user to provide Scrive Document Api Name. The next flow element ('Get Records') retrieves the document from the database. If the document with provided Api Name is not found in the database, the flow logic goes to the screen 'NotFoundDocument' and will display information that the document was not found.



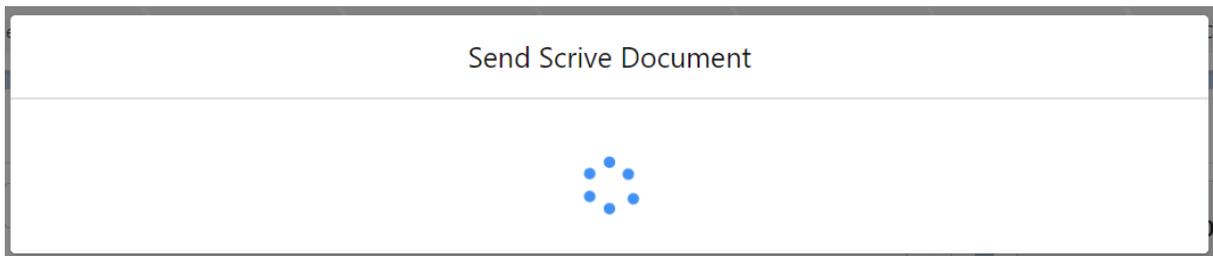
If the document is found, then the result of this action is used by 'Send Scrive Document' Apex Action. If the apex method successfully sends the document the last screen shows success information. If an apex method invocation encounters an error, the fault element leads to the 3rd screen and displays the exception message.

Example of screens for the described flow:

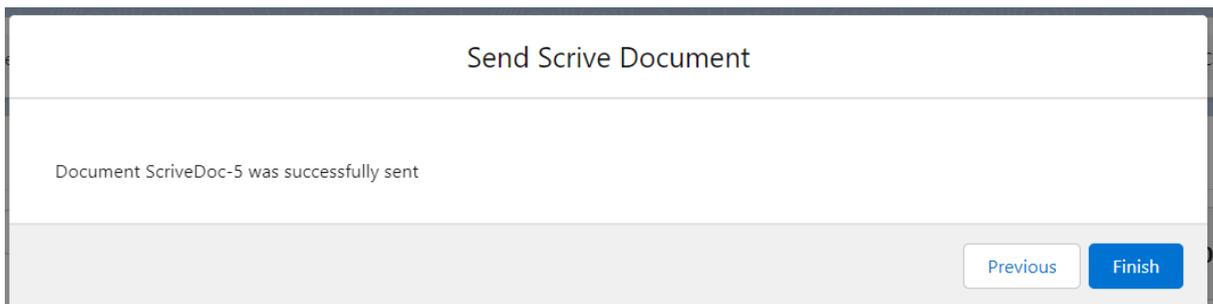
1) Screen flow element - provide Api Name of the Document



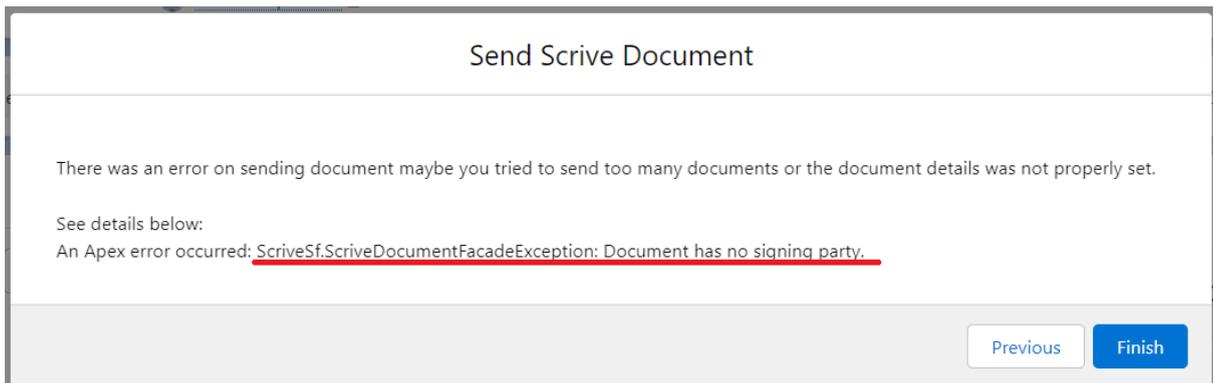
2) Flow action in progress



3) Successfully sent document with the flow

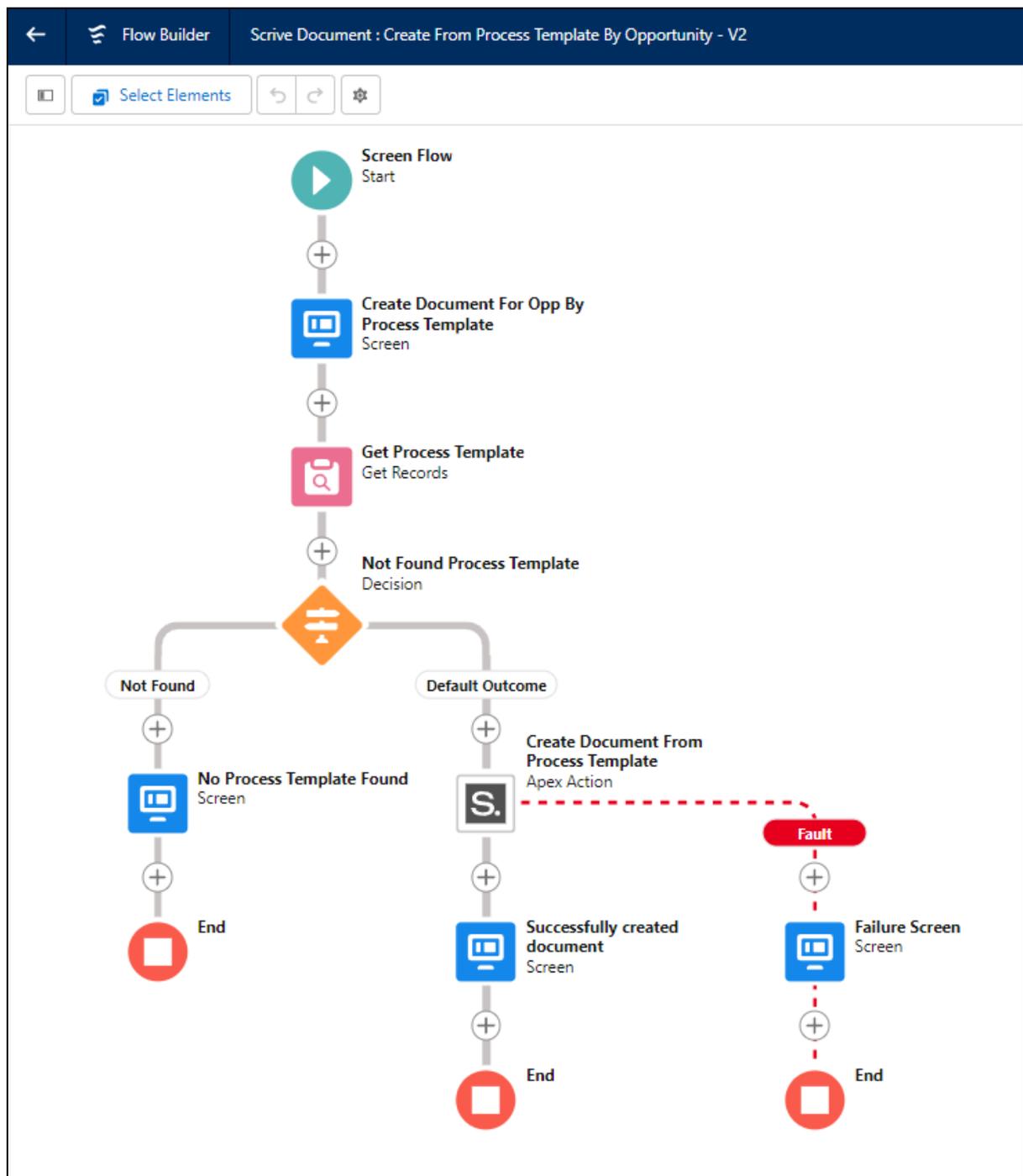


4) Error occurred when sending a document ('Document has no signing party.')



The second flow example is also a Screen Flow with the difference that it has to be used on an Opportunity record page. The flow contains a 'recordId' variable which is defined as an input parameter for the flow. The Scrive invocable method 'createDocumentsFrom ProcessTemplates' requires 2 input parameters: Process Template Id and Document Related Record Id. When starting a flow the Opportunity Id (Document Related Record Id) is automatically populated from the displayed Record Page as 'recordId' variable. The

Process Template Id has to be provided and for this requirement a first screen collects a unique name of a Process Template from a user. The next element is retrieving data from the database to find the Id of the Process Template. If the record is not found the Screen element displays a message to a user that no Process Template was found for the provided Unique name, else 'Create Document From Process Template' Apex Action is called. Lastly, depending on the apex action result the message is displayed with success or error message.



Example of screens for the second flow:

1) Screen flow element - provide Process Template Unique Name

ScriveDoc From Process

\*Provide Process Template Unique Name

ScriveProcessTemplate\_1685626231804

Next

2) Successfully created document

ScriveDoc From Process

The document was successfully created a060900000Wj1yDAAR

Finish

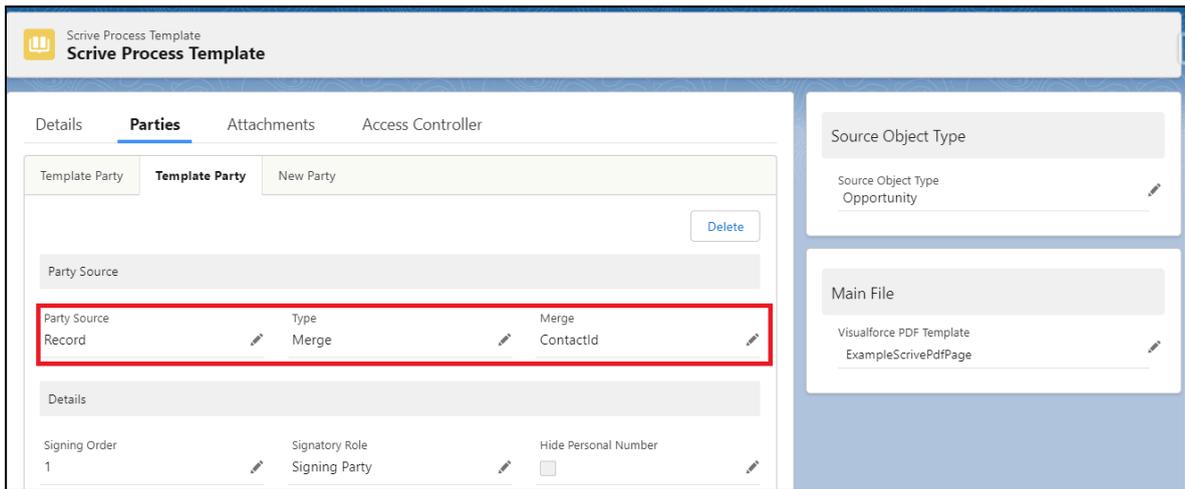
3) Exception encountered during document creation ('no Process Template found')

ScriveDoc From Process

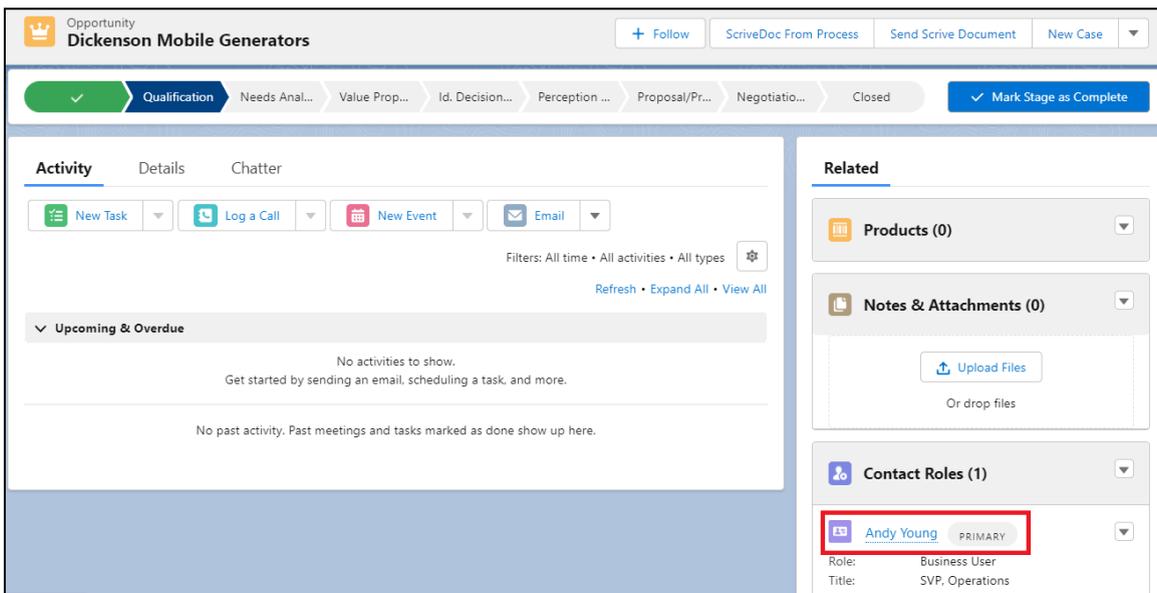
No record found for provided Unique Name (Incorrect Unique Name Example).  
Please check if this Process Template exists.

Previous Finish

With the second example a user can define a Process Template Party based on the Primary Contact from an Opportunity. This means that creating a Scrive Document can have for instance a different Signing Party for every Opportunity where the flow was invoked. Below is an example of how to define a Process Template Party to collect information from Opportunity Primary Contact.



The Opportunity Primary Contact can be found in the Contact Roles list. The primary contact has a 'Primary' badge added. This contact will be a Signing Party for the Document created with the second flow example based on the Process Template with the party defined as in the previous picture shown.



Presented flow examples, which are using Scrive invocable methods, could be combined into one Flow. This would allow a user to prepare a Scrive Document based on Process Template definition and send it to parties with just one click. The user may create more complex logic using any of the methods which were listed at the beginning of this section.

# Release notes

## Release 0.3, 12.2021

1. Initial package release for new generation Scrive e-sign for Salesforce application.

## Release 0.4, 03.2022

1. General bug fixing.
2. Dynamic authentication and delivery methods.
3. Callback without manual steps.
4. Hidden approver signatory role.
5. Incremental mode for Scrive Document attachments.
6. Default value for 'Days to sign' value setup in Scrive Settings panel.
7. Scrive Template configuration import for Scrive Process Template.

## Release 0.5, 05.2022

1. ScriveGlobal adjustments for the custom development.
2. Support for field mapping of scrive date field.
3. Scrive Browser - the panel that presents the list of documents from scrive.com and allows importing the documents that are not yet represented in Salesforce.
4. Branded Subdomain support.
5. Modification of the "Start Scrive Process" process - "Start Scrive Process Template On Record" lightning component instead of quick action.

## Release 0.6, 06.2022

1. Directional field mapping.

## Release 0.7, 03.2022

1. Scrive Browser improvements.
2. Document Events tab on a document.
3. Default Global Field Mapping adjustments.
4. Additional "Scrive Viewer" permission set (read only preview of SF records without Scrive account).
5. Field mapping support for multiline Scrive fields.
6. Request Attachments feature for parties with signatory role.
7. Fix for "Override Document Title" feature on a Process Template flow.
8. General user interface improvements and minor bug fixing.

#### Release 0.8, 03.2023

1. Process Template Access controller feature (to control what is editable by users on a document based on a process template).
2. Minor bug fixing.

#### Release 0.9, 06.2023

1. Invocable Scrive Actions for flows.
2. Validation of required fields for selected delivery, confirmation and authentication methods.
3. Optional party feature for Process Template Party.
4. Minor bug fixing.

#### Release 0.10, 08.2023

1. Fix for merge email option for Process Template Party.
2. Additional access checks and validations.
3. IDocumentPostAction interface ready for Scrive CPQ extension.
4. Minor bug fixing.

#### Release 0.11, 09.2023

1. Accepting Terms Of Service on Scrive User provisioning.
2. Initial preparation for CPQ extension (inactive Classic Document object handler).
3. Contact Roles support for Opportunity, Contract, Case and Account.
4. Minor bug fixing.

#### Release 0.12, 10.2023

1. Fix for missing mandatory flag for custom fields for Scrive Document created from Scrive Template.
2. Fix for missing User for initiating Scrive Document Party while Import action.
3. General exception handling improvements.

#### Release 0.13, 03.2024

1. Mass Import global class.
2. Scrive User Provisioning and Scrive OAuth2 Authorization flow.
3. User management improvements.
4. Support for multiple UserGroups.
5. Fix for Document Events with too long description.
6. Option to provide different Scrive Email than SF user email for Scrive User Provisioning.
7. 'Email and Party' source type for Scrive Document Party

- a. Important note: if upgrading to 0.13 from earlier version, it is required to manually add '**Email And Name**' picklist value on a Party Source field on both, Scrive Document Party and Scrive Process Template Party objects  
API Name: **Email And Name**; Label: **Email And Name**
- i. ScriveSf\_\_DocumentParty\_\_c.ScriveSf\_\_PartySource\_\_c
  - ii. ScriveSf\_\_ProcessTemplateParty\_\_c.ScriveSf\_\_PartySource\_\_c