

**Admin Guide
for
Scribe 2.0 CPQ Extension - Salesforce Package**

Scribe.

V0.2 16.11.2023



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1. Introduction

This document presents the detailed configuration of the Scrive 2.0 CPQ Extension for Salesforce - the application that connects Scrive e-sign service and CPQ data.

2. Package Installation

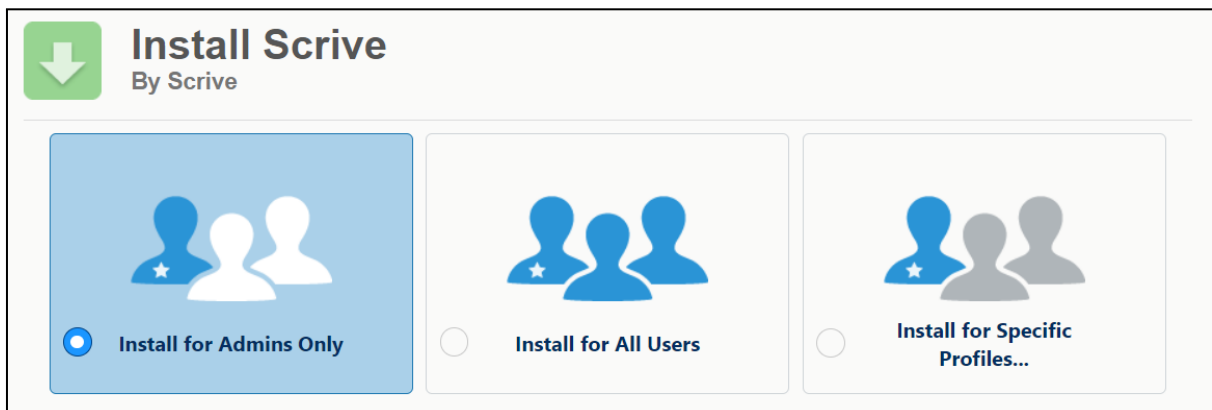
Prerequisites (required applications):

- [Salesforce CPQ](#) (244.2.0.1 or newer),
- [Scrive](#) (0.11 or newer).

The Scrive Application is installed from the AppExchange at

https://appexchange.salesforce.com/appxListingDetail?listingId=TO_BE_ADDED_SOON

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 the *Scrive CPQ User* permission set.



3. Package configuration

Scrive 2.0 CPQ Extension requires a few steps of configuration to connect CPQ and Scrive services.

3.1 Electronic Signature Plugin

The Salesforce CPQ package gives an opportunity to connect an electronic signature plugin and incorporate it into the Quote Document generation process. It can be done in the ***Installed Package*** section in Salesforce Setup.

Scrive Document. To activate this feature, “Classic Document” picklist value has to be activated on listed Picklist Value Sets:

- Document: Source Document Types,
- Template: Source Document Types,
- Template: Override Source Document Types.

It can be done in the **Picklist Value Sets** section in Salesforce Setup.

Q Picklist Value Sets

✓ Objects and Fields

Picklist Value Sets

Didn't find what you're looking for? Try using Global Search.

SETUP
Picklist Value Sets

Picklist Value Sets

Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved through the API.

View: Source Document Types Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Global Value Sets New

Action	Label	Description
Edit Del	Document: Source Document Types	Scrive Document: options to selected a PDF source for Document
Edit Del	Template: Override Source Document Types	Scrive Process Template: options to selected a PDF source for Process Template, which overrides Scrive Template PDF from scrive.com
Edit Del	Template: Source Document Types	Scrive Process Template: options to selected a PDF source for Process Template

Deleted Global Value Sets (0)

Edit each Picklist Value Set from the above list and make sure that **Classic Document** value is activated (is listed in the *Values* section).

Q Picklist Value Sets

✓ Objects and Fields

Picklist Value Sets

Didn't find what you're looking for? Try using Global Search.

SETUP
Picklist Value Sets

Global Value Set (Managed)

← Back to List

This Global Value Set is managed, meaning that you may only edit certain attributes. Display More Information

Values (5) | Inactive Values (1) | Fields Where Used (1)

Global Value Set Detail Edit

Information

Label	Description
Document: Source Document Types	Scrive Document: options to selected a PDF source for Document

Picklist Values Used

Active and inactive picklist values: 6 (1 000 max)

Edit

Values New Reorder Replace Printable View Chart Colors

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Scrive Template	Scrive Template	☐	Assigned dynamically	Admin Cloudity, 18.10.2023, 16:48
Edit Del Deactivate	From File	From File	☐	Assigned dynamically	Admin Cloudity, 18.10.2023, 16:48
Edit Del Deactivate	Visualforce PDF Template	Visualforce PDF Template	☐	Assigned dynamically	Admin Cloudity, 18.10.2023, 16:48
Edit Del Deactivate	Lightning File From Related Record	Lightning File From Related Record	☐	Assigned dynamically	Admin Cloudity, 18.10.2023, 16:48
Edit Del Deactivate	Imported from Scrive.com	Imported	☐	Assigned dynamically	Admin Cloudity, 18.10.2023, 16:48

Inactive Values

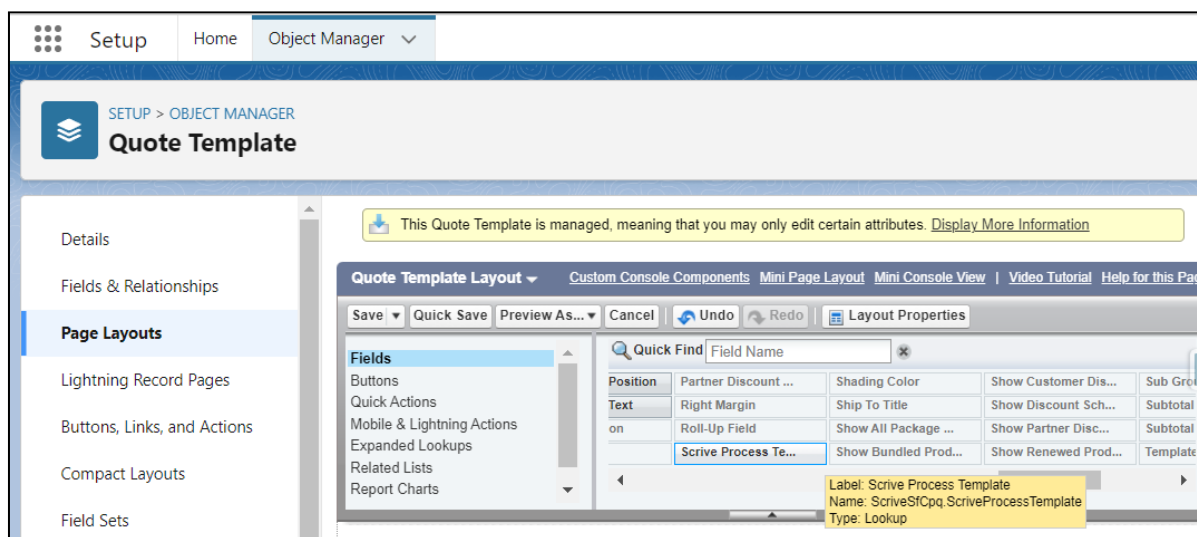
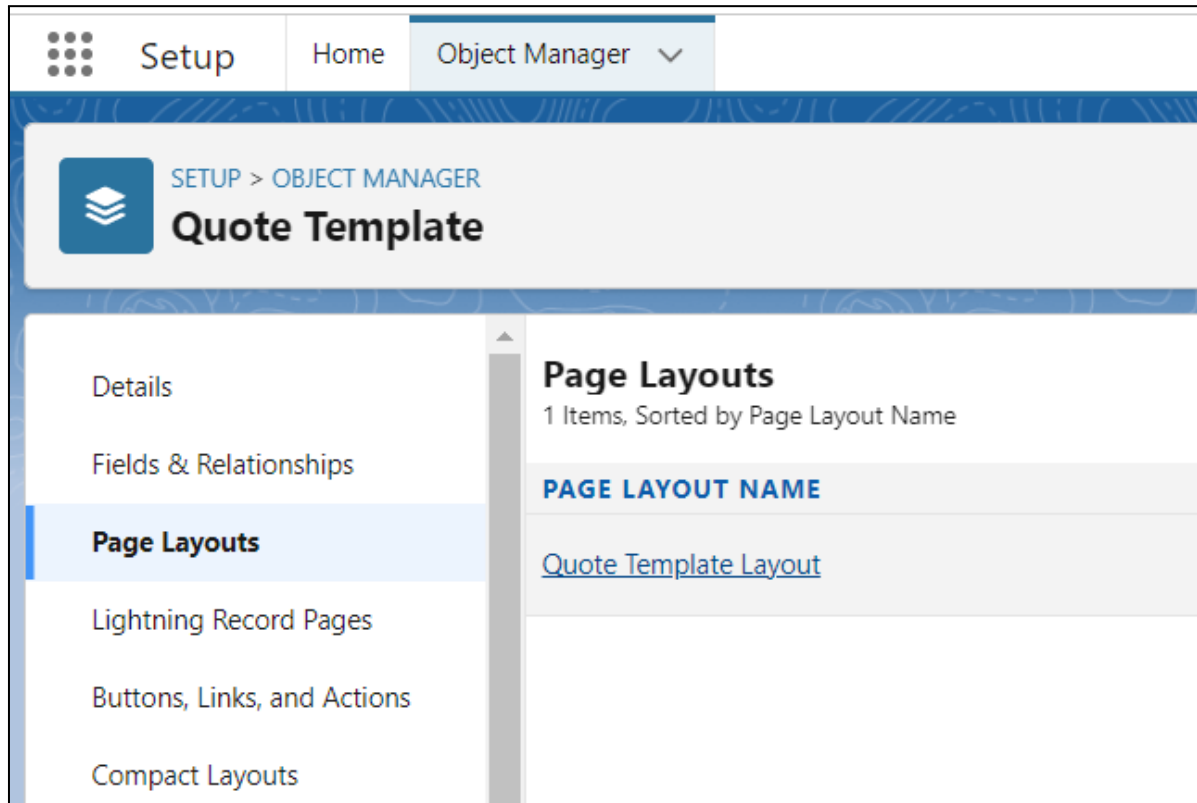
Action	Values	API Name	Modified By
Del Activate	Classic Document	Classic Document	Admin Cloudity, 27.10.2023, 11:05

3.2.1 Troubleshooting

- Classic Document value is not present in *Values* and *Inactive Values* sections:
- ◆ Create new value with Label and API Name set as “Classic Document”.

3.3 Scrive Process Template lookup on Quote Template

Scrive 2.0 CPQ Extension package contains a new **Scrive Process Template** lookup field (*ScriveSfCpq__ScriveProcessTemplate__c*) on a **Quote Template** object (*SBQQ__QuoteTemplate__c*) from CPQ package. The field has to be added to the Quote Template page layout manually to ensure the possibility to relate the Quote Template record with specific Scrive Process Template record from the user interface. It can be done in the Object Manager for the Quote Template object.

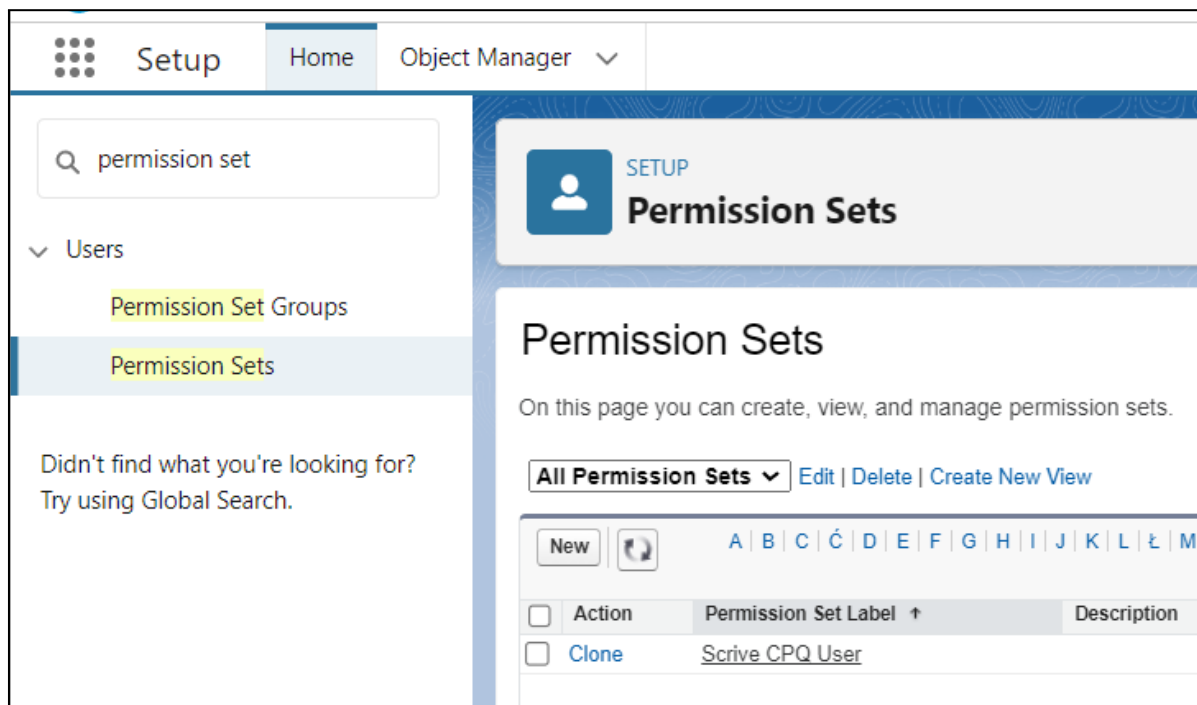


There are no specific requirements for the location of the *Scrive Process Template* field on the *Quote Template Layout*.

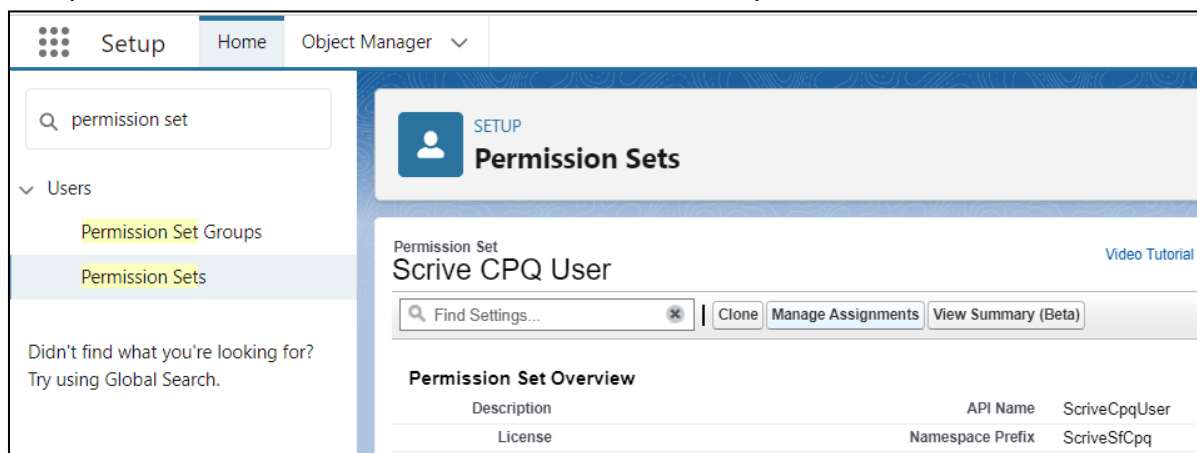
Note: Scrive Process Template lookup field on a Quote Template object has a filter that allows to point only Scrive Process Template record with Source Object Type set to Quote Document.

3.4 Assign Scrive CPQ User permission set

The user has to be assigned to Scrive CPQ User permission set to use logic from the Scrive 2.0 CPQ Extension package. It can be done in the *Permission Sets* section in Salesforce Setup.

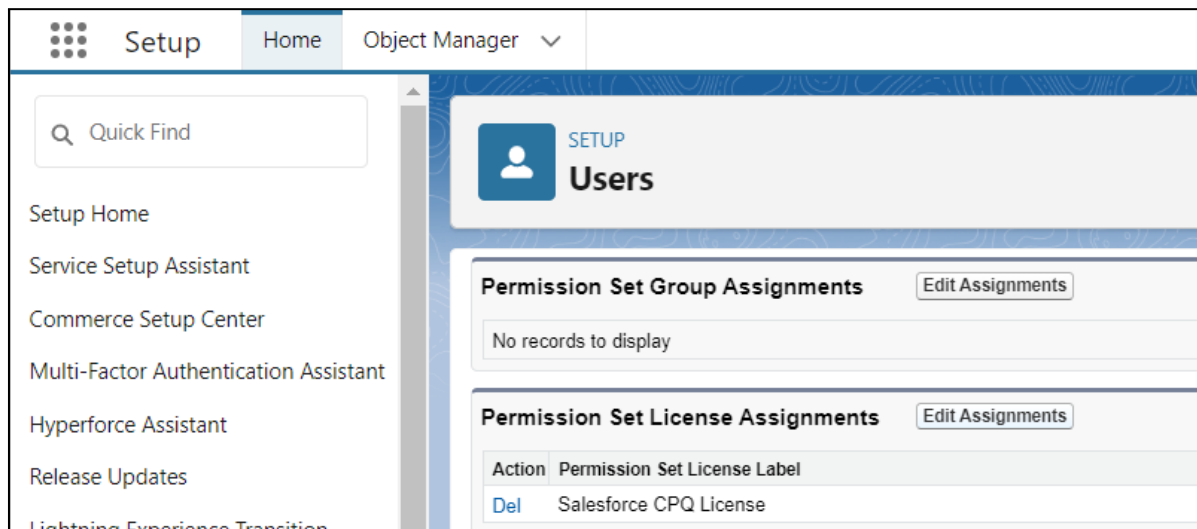


To assign a user to the *Scrive CPQ User* permission set, the *Manage Assignments* button on a permission set record has to be selected and further process has to be followed.



Important note: To assign *Scrive CPQ User* permission set to specific user, it is required to ensure required permissions for this user to basic objects from:

- [Scrive](#) package:
 - Scrive User checkbox has to be checked in *Scrive Admin Panel* tab (more details on an Admin Guide for base Scrive package - “3.2.2 Scrive User permission - management”),
- Salesforce CPQ package:
 - Salesforce CPQ License assignment and Salesforce CPQ User permission set assignment (more details on CPQ documentation).



3.4.1 Troubleshooting

- Scrive CPQ User permission set assignment failed:
- ◆ Ensure that the selected user is marked as a *Scrive User* in *Scrive Admin Panel* tab,
 - ◆ Ensure that the *Salesforce CPQ Licence* is assigned to the selected user,
 - ◆ Ensure that the *Salesforce CPQ User* permission set is assigned to the selected user.

3.5 Quote Document Signature Status mappings

Note: This section can be skipped if Quote Document Signature Statuses keep default values.

When the Scrive Document will change status also related Quote Document will be updated based on provided mappings. Default mappings from the Scrive 2.0 CPQ Extension:

Object: ScriveSf__Document__c Field: ScriveSf__Status__c	Object: SBQQ__QuoteDocument__c Field: SBQQ__SignatureStatus__c
new	Pending

preparation	Pending
pending	Sent
closed	Signed
timedout	Expired
canceled	Revoked
rejected	Revoked
document_error	Revoked

If some mappings adjustments are required, it can be done in the Custom *Metadata Types* section in Salesforce Setup. **Manage Records** should be clicked for Scrive CPQ Status Mapping row.

The screenshot shows the Salesforce Setup interface for Custom Metadata Types. The left sidebar contains a search bar and a list of custom code items, including 'Custom Metadata Types'. The main content area is titled 'All Custom Metadata Types' and includes a 'New Custom Metadata Type' button. Below this is a table with columns: Action, Label, Installed Package, Namespace Prefix, Visibility, API Name, Record Size, and Description. The table lists a custom metadata type named 'Scrive CPQ Status Mapping' with a record size of 436. The 'Manage Records' link is highlighted for this type. The description of the type states: 'Definition of mappings used by Scrive CPQ extension for Quote Document Signature Status update [Scribe Document Status -> Quote Document Signature Status]. Defaults values defined based on default values of Scrive Document Status and Quote Document Signature Status. new -> Pending, preparation -> Pending, pending -> Sent, closed -> Signed, timedout -> Expired, canceled -> Revoked, rejected -> Revoked, document_error -> Revoked.'

3.5.1 Troubleshooting

- Quote Document Signature Status is not updated when Scrive Document status is changed:
 - ◆ Ensure that the mappings are defined correctly.

4. Process Configuration

To incorporate Scrive logic into *Generate Document* CPQ logic it is required to define Scrive Process Template and Quote Template.

4.1 Scrive Process Template for Quote Document

The Scrive Process Template that points a Quote Document object as a Source Object Type has to be created as a base for an Electronic Signature process during “Generate

Document” CPQ flow. More details about Source Object Types can be found in the Admin Guide for main Scrive 2.0 package (“8.2 Source Object”).

The screenshot shows the 'Scribe Process Template' configuration page for the 'Quote Document Process'. The interface has a top header with the Scrive logo and the title 'Quote Document Process'. Below the header, there are four tabs: 'Details', 'Parties', 'Attachments', and 'Access Controller'. The 'Details' tab is active. Under the 'Details' tab, there is a section titled 'Scribe Process Template Information' with a dropdown arrow. Below this section, there are four fields: 'Scribe Process Template Name' (with the value 'Quote Document Process'), 'Days To Sign', 'Scribe Process Template Unique Name' (with the value 'QuoteDocumentProcess_1698673487765'), and 'Days to Remind'. To the right of these fields, there is a 'Source Object Type' section with a dropdown menu showing 'Quote Document' and 'Cancel' and 'Save' buttons.

The recommended flow is to use PDF generated by CPQ process and send it with Scrive service to all required parties. Quote Document PDF is saved as a [Document](#) object and to use it during the Scrive flow, the steps from the [Classic Document source](#) section have to be fulfilled.

Recommended approaches for Scrive Process Template preparation:

- Main File based on a quote document PDF generated by CPQ logic (Simple flow without custom fields and signatures),
- Scrive Template with Main File overridden by a Quote Document PDF generated by CPQ logic (Scribe Template flow with custom fields and signatures).

More details about Main File setup can be found in the Admin Guide for main Scrive 2.0 package (“8.3 Main File”).

The general setup of Scrive Process Template setup is described in an Admin Guide for base Scrive package (“8. Scrive Process Template” section).

4.1.1 Simple flow without custom fields and signatures

Main File on a Scrive Process Template record definition should be set as below:

- **Source Category** should be set as “**Classic Document**”,
- **Source** should be set as “**Document Id**” field from the Quote Document object (this field stores the ID of the PDF record generated during CPQ “*Generate Document*” process).

Main File

Select Source Category

Classic Document ▼

Select Source

Document Id ▼

Cancel Save

This flow does not support signature boxes of custom fields on a Scrive Document.

4.1.2 Scrive Template flow with custom fields and signatures

Main File on a Scrive Process Template record definition should be set as below:

- **Source Category** should be set as “**Scrive Template**”,
- **Source** should be set as the name of the Scrive Template defined on a [scrive.com](https://www.scrive.com) site - in this example it points to “CPQ Extension Demo” Scrive Template,
- **Override Scrive Template with Source Category** should be set as “**Classic Document**”,
- **Source** should be set as “**Document Id**” field from the Quote Document object (this field stores the ID of the PDF record generated during CPQ “*Generate Document*” process).

Main File

Select Source Category

Scrive Template

Select Source

CPQ Extension Demo

Override Scrive Template with Source Category

Classic Document

Override Scrive Template with Source

Document Id

CancelSave

This flow supports signature boxes of custom fields on a Scrive Document. Scrive Templates with custom fields and signatures are defined on a [scrive.com](https://www.scrive.com) page.

Note: When the *Source Category* is set to Scrive Template it is possible to import configuration to SF with *Import Configuration from Scrive* button to ensure that Scrive Process Template follows the setup from Scrive Template defined on [scrive.com](https://www.scrive.com).

Scrive Home

Success
Configuration from Scrive.com was imported.

Scrive Process Template
CPQ Extension Demo

Import Configuration from Scrive

DetailsPartiesMore

Scrive Process Template Information

Source Object Type

Source Object Type
SBQQ_QuoteDocument__c

4.2 Quote Template with Scrive Process Template

Next step is to create a Quote Template record and relate it to the specific Scrive Process Template.

Regarding detailed setup of the Quote Template record the CPQ documentation should be followed. To demonstrate setup of the Scrive 2.0 CPQ extension package, the default setup of the Quote Template will be used.

On a Quote Template record layout there should be a Scrive Process Template lookup field (if there is no such a field, steps from [Scrive Process Template lookup on Quote Template](#) should be followed). This field should point to the Scrive Process Template record with *Source Object* set to “Quote Document”.

Relating Quote Template and Scrive Process Template records gives opportunity to support multiple Quote Templates with various Scrive Process Templates.

New Quote Template

* = Required Information

Information

* Template Name

* Deployment Status

Generator Name

Scrive Process Template

Default ☐

Logo Document Id

Watermark ID

Page Information

* Page Width

* Page Height

* Top Margin

* Bottom Margin

* Left Margin

Cancel Save & New Save

4.2.1 Troubleshooting

- Not able to search for desired Scrive Process Template record on Scrive Process Template lookup field on Quote Template record.:

- ◆ Ensure that desired Scrive Process Template record has Source Object Type set to Quote Document (SBQQ_QuoteDocument__c) - Scrive Process Template lookup field has a filter to ensure that Scrive Process Template pointed on a Quote Document is designed for Quote Document source object.

The screenshot shows the 'Scrive Process Template CPQ Extension Demo' interface. The 'Details' tab is selected, displaying 'Scrive Process Template Information'. The 'Source Object Type' field is set to 'SBQQ_QuoteDocument__c'. A button 'Import Configuration from Scrive' is located in the top right corner.

5. Sample CPQ flow with Scrive signing process

To incorporate Scrive logic into *Generate Document* CPQ logic it is required to define Scrive Process Template and Quote Template.

5.1 Quote definition

A new Quote record should be created based on a CPQ documentation.

The screenshot shows the 'Quotes' interface. The 'Recently Viewed' section displays 1 item. The interface includes buttons for 'New', 'Change Owner', and 'Import'. A search bar and various action icons are also present.

5.2 Generating Quote Document and starting Scrive process

“Generate Document” quick action should be selected on a Quote record.

The screenshot shows a Salesforce interface for a Quote record with ID Q-00000. The 'Details' tab is active, displaying fields for Quote Number, Primary, Sales Rep, Primary Contact, Opportunity, Account, Type, Quote, Status, and Draft. A dropdown menu is open from the 'New Opportunity' button, listing actions such as New Case, New Lead, Delete, Clone, Change Owner, Printable View, Sharing, Sharing Hierarchy, Clone with Related, Edit Lines, Include Document, and Generate Document.

It redirects to a page from the CPQ package. First of all, a Quote Template that has a related Scrive Process Template should be pointed as a template (in this sample scenario it is "Sample Quote Template").

Next, "Send with Scrive" button should be clicked to start the process.

The screenshot shows the 'Generate Document' dialog box. It includes a 'Document Options' section with a 'Template' dropdown set to 'Sample Quote Template', a 'Paper Size' dropdown set to 'Default', and a 'Document Name' field containing 'Q-00000-20231030-1625'. At the top right, there are buttons for 'Preview', 'Send with Scrive', 'Save & Email', 'Save', and 'Cancel'.

When the process is completed successfully, it redirects to the Scrive Document record that is created based on the Scrive Process Template that was pointed at a Quote Template record.

Scribe Document
Quote Document Process

Create Draft Send Delete

Scribe Document Name	Status	Language
ScribeDoc-5	New	English

Details Parties Attachments Events

Some fields/actions might be in a read only mode.

Information

Title	Days To Sign
Quote Document Process	14
Language	Days to Remind

Related Record

Quote Document
Q-00000-20231030-1620

Further actions can be executed on the document - more details on possible actions can be found on Admin Guide for main Scrive 2.0 package ("7.1 Highlights panel").

6. General troubleshooting

- "Classic Document" options is not present when defining Main File on Scrive Process Template:
 - ◆ Ensure that "Classic Document" options are activated on specific Picklist Value Sets (more details: [Classic Document source](#)),
- Scrive Process Template field is missing on a Quote Template record:
 - ◆ Ensure that the field is added to the Quote Template page layout (more details: [Scrive Process Template lookup on Quote Template](#)),
 - ◆ Ensure that the Scrive CPQ User permission is assigned for the current user (more details: [Assign Scrive CPQ User permission set](#)),
- "Send with Scrive" button is not present in "Generate Document" page:
 - ◆ Ensure Electronic Signature Plugin in CPQ package configuration is provided correctly (more details: [Electronic Signature Plugin](#)),
 - ◆ Ensure Scrive 2.0 CPQ Extension is installed: Setup → Installed Packages (more details: [Package Installation](#)),
- Expected *Quote Template* is not present in a "Template" picklist in "Generate Document" page:
 - ◆ Ensure that this specific Quote Template record is set as "Deployed".



Quote Template
Sample Quote Template

Related

Details

* Template Name

Sample Quote Template

* Deployment Status 

Deployed

--None--
In Development
✓ Deployed

→ “Selected Quote Template does not point Scrive Process Template to be used in the process” exception appears after execution of the “Send with Scrive” button:


Generate Document


Selected Quote Template does not point Scrive Process Template to be used in the process.

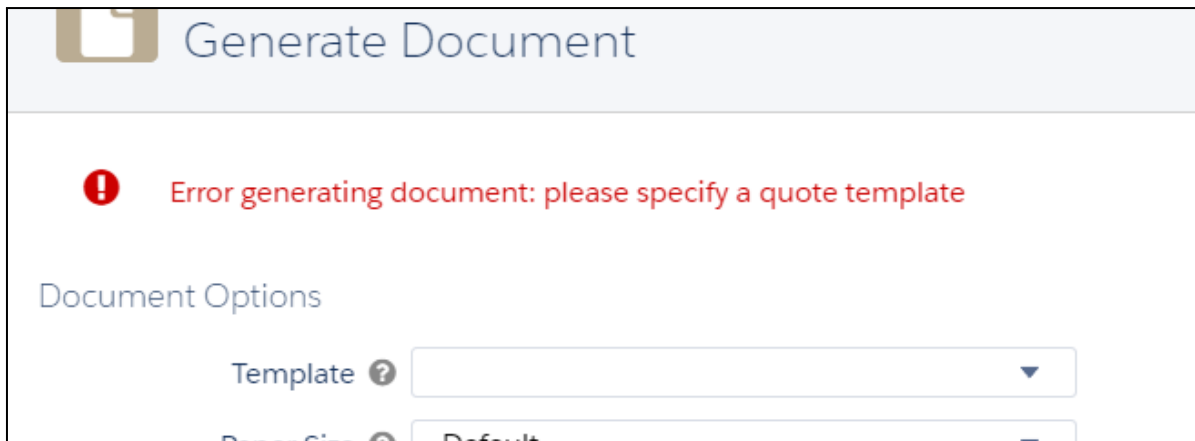
Document Options

Template 

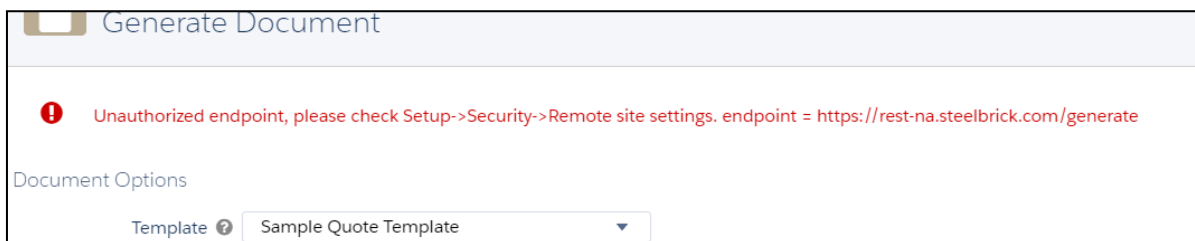
Sample Quote Template

◆ Scrive Process Template field is empty on selected Quote Template record (more details: [Quote Template with Scrive Process Template](#)),

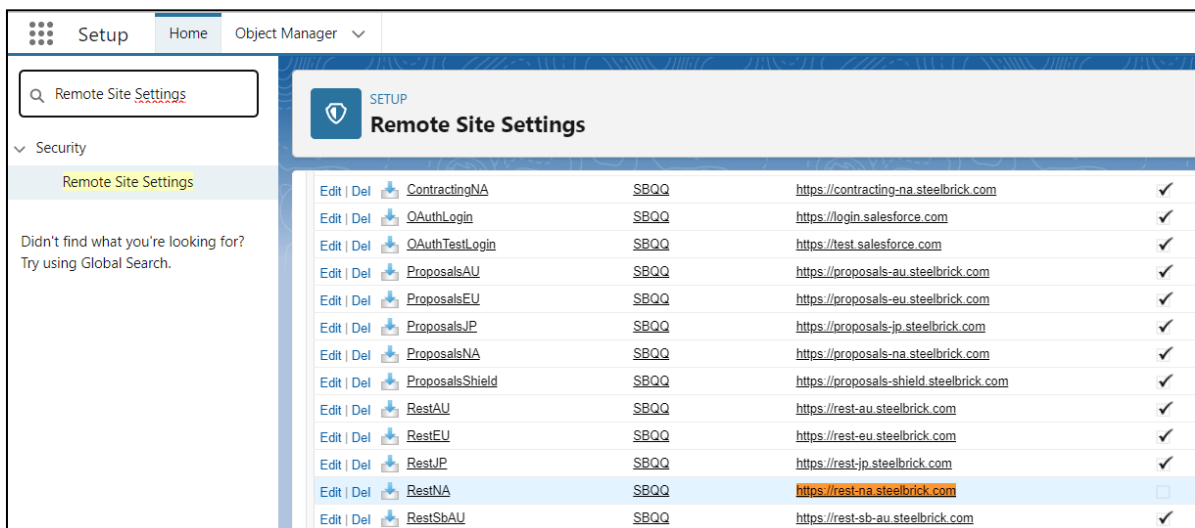
→ “Error generating document: please specify a quote template” exception appears after execution of “Send with Scrive” button:



- ◆ No “Template” is selected for “Generate Document” process,
- “Unauthorized endpoint, please check Setup->Security->Remote site settings. endpoint = <https://rest-na.steelbrick.com/generate>” exception appears after execution of “Send with Scrive” button:



- ◆ Ensure that pointed endpoint is active in *Remote Site Settings* section in Salesforce Setup,



- Quote Document Signature Status has not changed as expected:
 - ◆ Ensure that the mappings and picklist values on a Quote Document's Signature Status field are consistent (more details: [Quote Document Signature Status mappings](#)),
- Other problems related to Scrive logic:
 - ◆ Refer to Scrive 2.0 Admin Guide,
- Other problems related to CPQ logic:
 - ◆ Refer to CPQ documentation.

Release notes

Release 0.1, 10.2023

1. **Prerequisites:** [Salesforce CPQ](#) (244.2.0.1 or newer), [Scrive](#) (0.11 or newer)
2. Initial package release for new generation Scrive 2.0 CPQ Extension.

Release 0.2, 11.2023

1. **Prerequisites:** [Salesforce CPQ](#) (244.2.0.1 or newer), [Scrive](#) (0.11 or newer)
2. Minor improvements.