



Admin & User Documentation

V1.0

AQUIVA LABS

Version History

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1.0			Initial version

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Summary

The Webdox for Salesforce application is a rebuilt integration designed to provide a stable, reliable, and user-friendly solution for managing workflows, generating documents, and synchronizing data between Salesforce and Webdox.

Supported Editions: The application is supported only in **Enterprise, Unlimited, and Developer Editions of Salesforce.**

This User Guide explains how to configure and use the main features of the application, including:

- **Multi-Account Setup** – Connect and manage multiple Webdox accounts from a single Salesforce org.
- **Dynamic Field Mapping** – Map Webdox workflow attributes to standard or custom Salesforce object fields without limitations.
- **User Mapping** – Assign Salesforce users to Webdox profiles through an admin-only interface.
- **Template Management** – Upload, select, and configure templates with merge fields and workflow templates available in Salesforce.
- **Workflow Execution** – Trigger and monitor Webdox workflows directly from Salesforce records with real-time status updates.
- **Multi-Language Support** – Navigate the application in Spanish, English, or Portuguese.

Important:

- The Webdox CLM app will only appear in the **App Launcher** for users with the **WebdoxCLM - Admin** permission set.
- After creating a Webdox account connection, admins must also **grant External Credential Principal Access**. Without this step, the authentication will fail.

Prerequisite: Before starting, assign the **WebdoxCLM - Admin** permission set to your own user.

Accounts Setup

The **System Administrator** is responsible for the initial configuration and management of the Webdox for Salesforce integration. All setup is done in the dedicated **Webdox CLM** app, which includes a **Webdox Configuration** tab with the following sub-tabs:

- Login
- User Mapping
- Field Mapping
- Word Templates
- Workflow Templates

First, navigate to **Setup** and manage User Assignments to ensure the correct access level is applied.

Role	Required Permission Set(s)
System Administrator	WebdoxCLM - Admin and WebdoxCLM - User
End Users	WebdoxCLM - User only

Steps

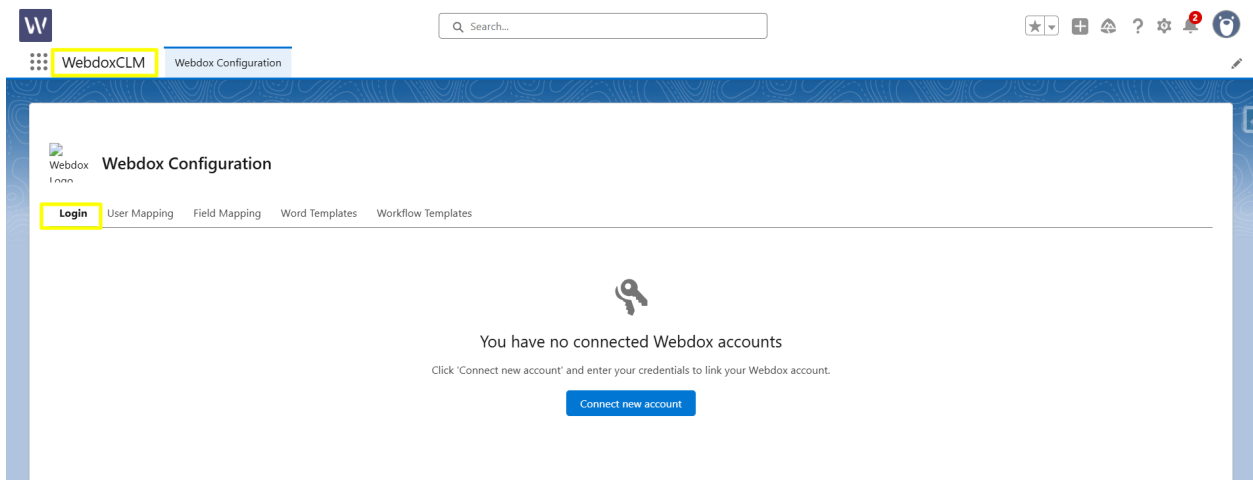
To begin the setup process, you must follow the steps below. Each step will guide you through the required actions to complete the configuration successfully.

Step 1: Connect Your First Webdox Account

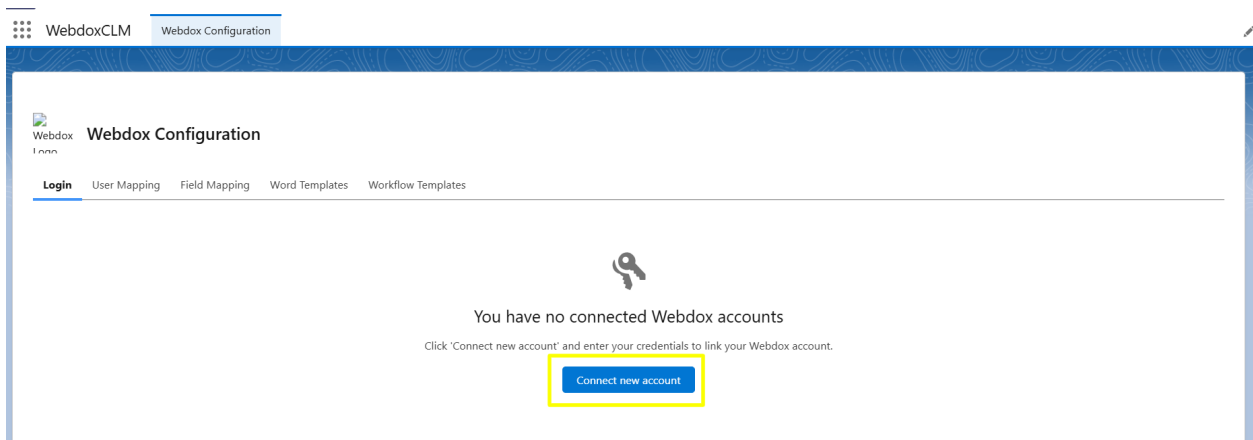
To start using Webdox inside Salesforce, the first step is to connect at least one Webdox account. This creates a secure link between both systems and allows administrators to manage workflows, templates, and users directly from Salesforce. The following manual steps need to be completed for each account.

Steps:

1. Go to the **Webdox CLM** app and open the **Login** tab.

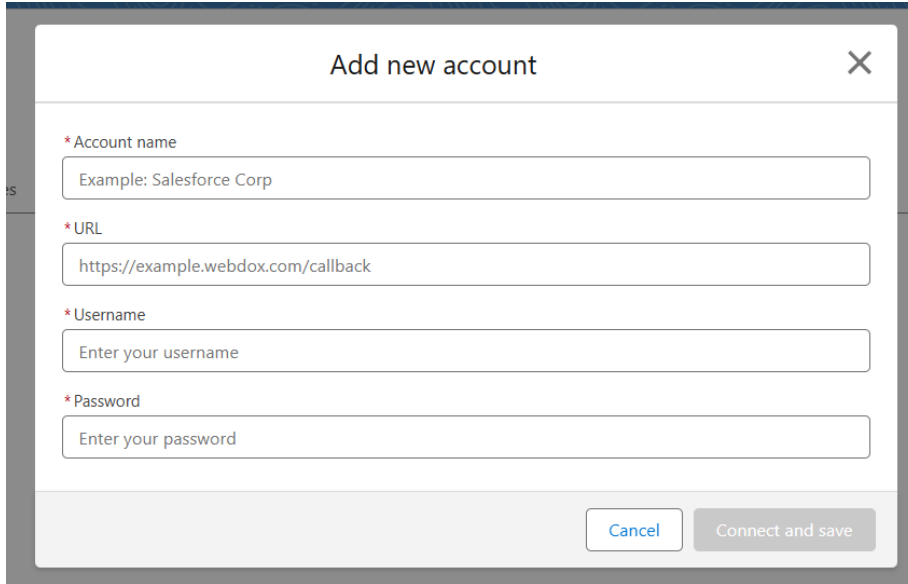


2. Click **Connect New Account**.



3. In the pop-up window, enter:

- **Account Name**
- **Redirect URL** (https://) API URL
- **Username** (email format)
- **Password** for the Webdox account

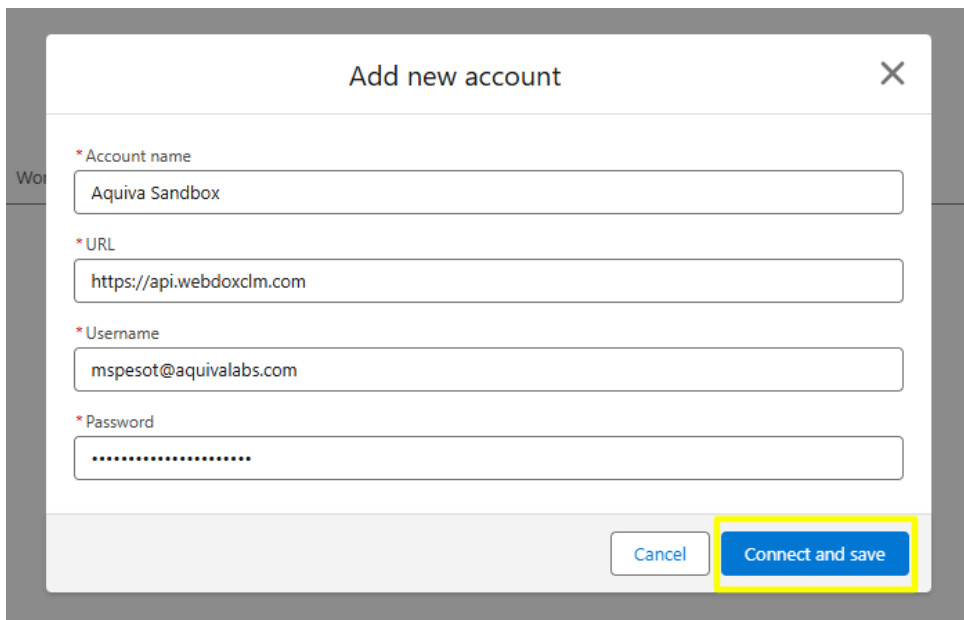


The screenshot shows a dialog box titled "Add new account" with a close button (X) in the top right corner. It contains four input fields, each with a red asterisk indicating a required field:

- * Account name**: The input field contains the placeholder text "Example: Salesforce Corp".
- * URL**: The input field contains the placeholder text "https://example.webdox.com/callback".
- * Username**: The input field contains the placeholder text "Enter your username".
- * Password**: The input field contains the placeholder text "Enter your password".

At the bottom right of the dialog, there are two buttons: "Cancel" and "Connect and save".

4. Click **Connect and save**.



This screenshot shows the same "Add new account" dialog box, but with specific values entered into the fields. The "Connect and save" button is highlighted with a yellow border.

- * Account name**: The input field contains the text "Aquiiva Sandbox".
- * URL**: The input field contains the text "https://api.webdoxclm.com".
- * Username**: The input field contains the email address "mspedesot@aquivalabs.com".
- * Password**: The input field contains a series of dots, indicating a masked password.

At the bottom right, the "Cancel" button is next to the "Connect and save" button, which is highlighted with a yellow border.

This will create the account connection and store the login securely.

Login User Mapping Field Mapping Word Templates Workflow Templates

Account settings

Connect and manage multiple Webdox accounts.

 To continue, you need to login to a Webdox account

Aquiva Sandbox



Connected

Username
mspesot@aquivalabs.com

URL
https://api.webdoxclm.com

Log In

5. Open the newly created **Named Credential** in Salesforce and **enable for callout**.

Setup Home

Named Credentials

Einstein Recommendation Builder

Get Started with Einstein Bots

Mobile Publisher

Named Credentials

6 items - Sorted by Label

Label	Type	URL	External Credential	Actions
Aquiva Sandbox	Secured Endpoint	https://api.webdoxclm.com	Webdox External Aquiva Sandbox	
First Account	Secured Endpoint	https://app.webdoxclm.com	Webdox External First Account	
First Test	Secured Endpoint	https://app.webdoxclm.com/	Webdox External First Test	
Test 1	Secured Endpoint	https://app.webdoxclm.com	Webdox External Test 1	
Test 2	Secured Endpoint	https://google.com	Webdox External Test 2	
Test 3	Secured Endpoint	https://aquiva.atlassian.net/	Webdox External Test 3	

Setup > NAMED CREDENTIALS

Aquiva Sandbox

Edit Delete

Label: Aquiva Sandbox

Name: Aquiva_Sandbox

URL: https://api.webdoxclm.com

Enabled for Callouts: ☒

Edit Aquiva Sandbox

* Label: Aquiva Sandbox

* Name: Aquiva_Sandbox

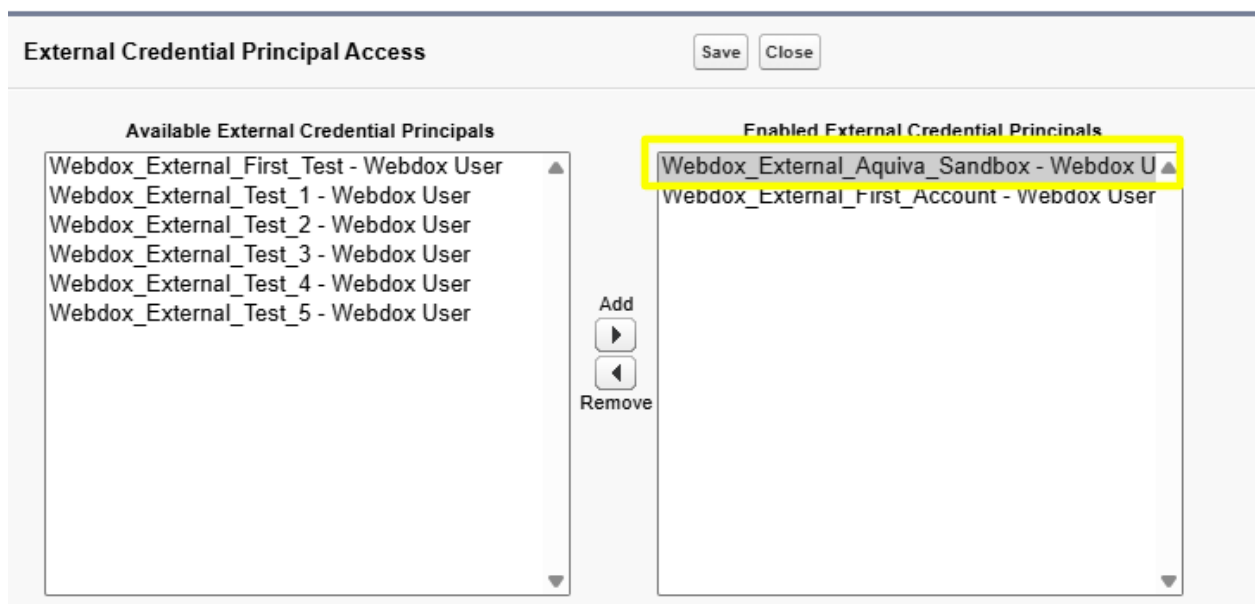
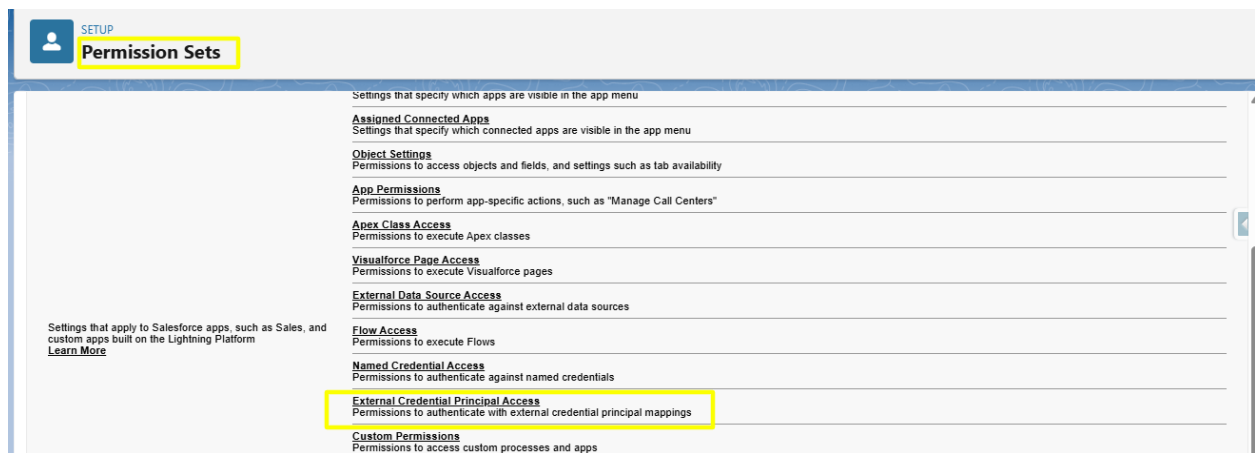
* URL: https://api.webdoxclm.com

Enabled for Callouts: ☒

Final step: Since packaged Permission Sets cannot be edited, you need to create a new Permission Set to add the required external credential access:

- Create a new Permission Set (e.g., "Webdbox CLM - External Credential Access").
- In this new Permission Set, go to "External Credential Principal Access".
- Click "Edit" and move the "Available External Credential Principal" to "Enabled External Credential Principals".
- Save the changes.
- Assign this new Permission Set to the corresponding users.

If not already created, set up a new Permission Set.



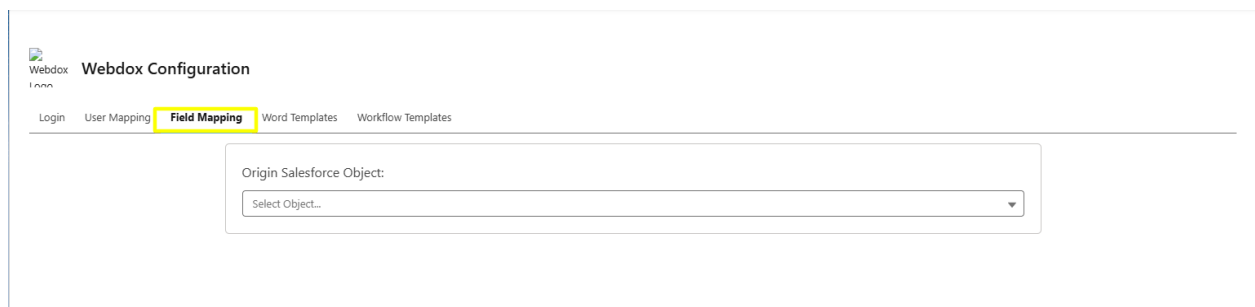
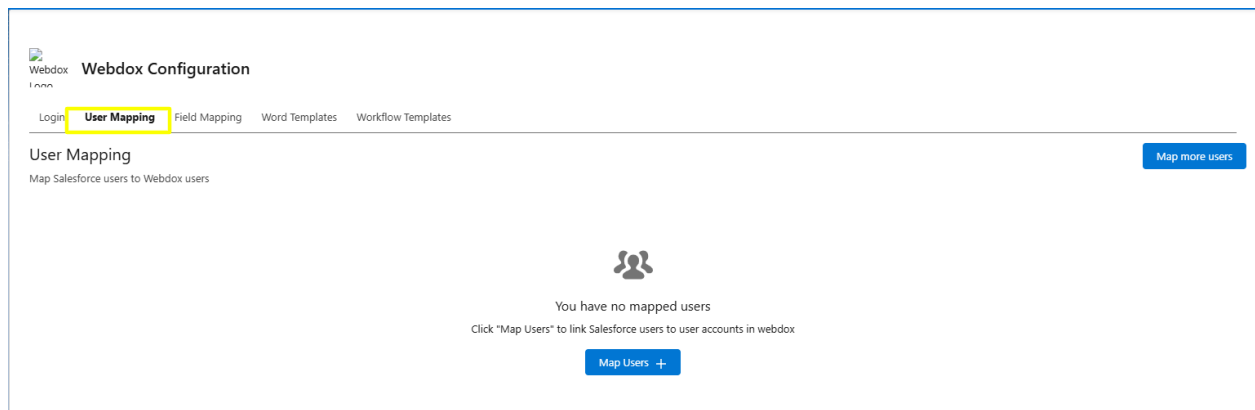
Once finished, your Webdox account is connected to Salesforce and the user's credential will be stored in the Custom Settings **"Webdox Security Config"**. This custom setting is not accessible to any user.

Step 2: Manage Accounts and Sessions

After you connect one or more Webdox accounts, you can view and manage them from the **Login** tab. From here, you can:

- Log in and log out of each account.
- Track active sessions
- Connect new account

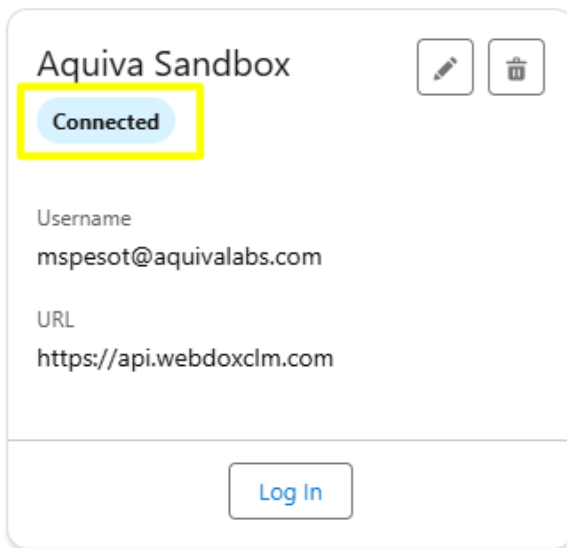
After at least one account is connected, you will also gain access to the other configuration tabs: **User Mapping**, **Field Mapping**, **Word Templates** and **Workflow Templates**.



The screenshot displays the 'Webdox Configuration' interface. At the top, there's a navigation bar with 'Login', 'User Mapping', 'Field Mapping', 'Word Templates' (highlighted with a yellow box), and 'Workflow Templates'. Below this, the 'Word Templates' section is active, showing options to 'Create a Word Template' by either uploading from a computer or selecting from Webdox. The 'Workflow Templates' section is also visible, showing a list of 'Webdox Workflow Templates (10)' and 'Templates in Salesforce (0)'. The 'Webdox Workflow Templates' list includes items like 'Como funcionan los formularios', 'Template De Prueba', and 'Webhook 1'. The 'Templates in Salesforce' section shows a search bar and a message: 'No Available Templates. No workflow templates found or none match your search criteria.'

Also, each connected account appears as a **card** in the Login tab.

- **Statuses:**
 - **Connected** → Linked but not logged in.



Aquiva Sandbox

Connected

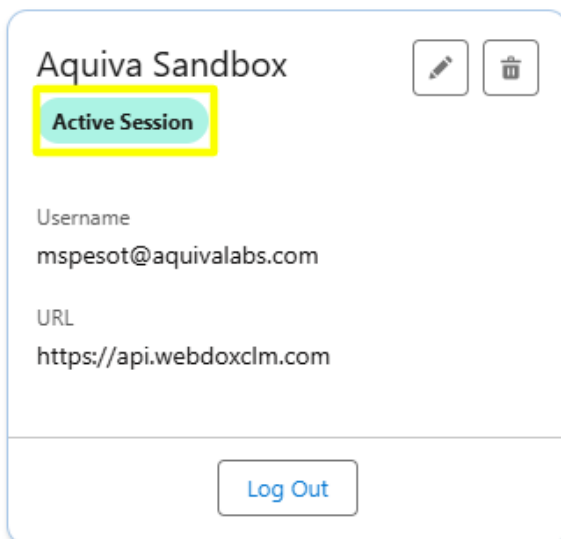
Username
mspesot@aquivalabs.com

URL
https://api.webdoxclm.com

Log In

The image shows a login form for 'Aquiva Sandbox'. At the top right are two icons: a pencil and a trash can. Below the title, a blue button labeled 'Connected' is highlighted with a yellow border. The form displays the username 'mspesot@aquivalabs.com' and the URL 'https://api.webdoxclm.com'. At the bottom is a 'Log In' button.

- **Active Session** → Logged in and ready to use.



Aquiva Sandbox

Active Session

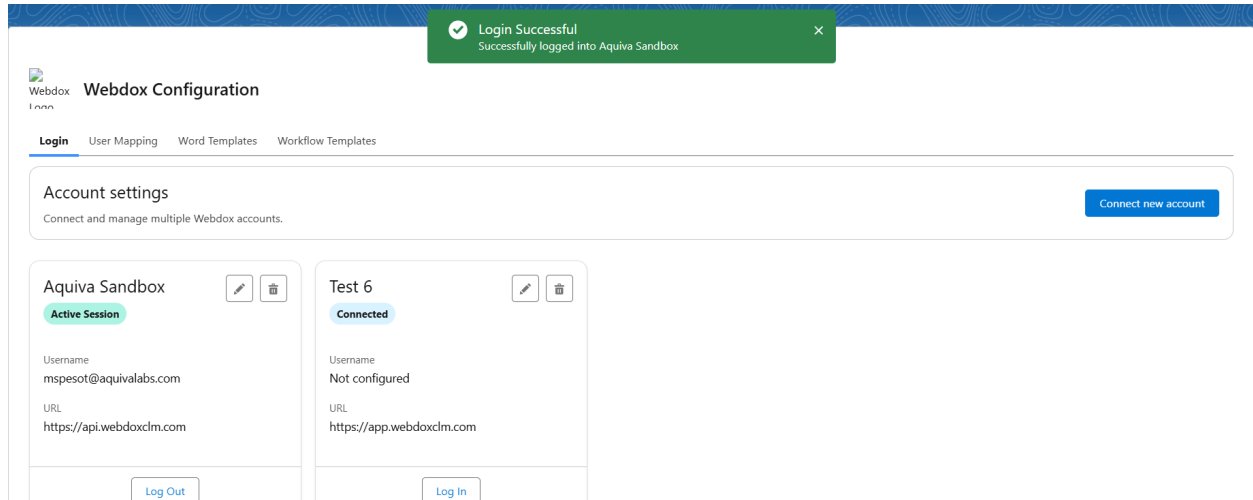
Username
mspesot@aquivalabs.com

URL
https://api.webdoxclm.com

Log Out

This image shows the same login form as above, but now the status is 'Active Session', which is highlighted with a yellow border. The 'Log In' button has been replaced with a 'Log Out' button.

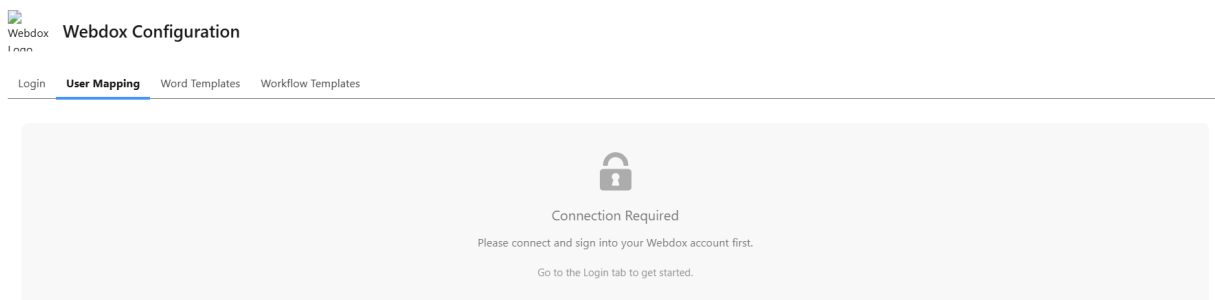
Once the account is logged in, a success message will appear.



- Actions you can take:
 - Edit credentials
 - Delete the connection
 - Log in / Log out

Only **one account can be active at a time**.

If no account has an active session, a **warning banner** will appear, and navigation to other configuration tabs will be blocked until an admin logs in.

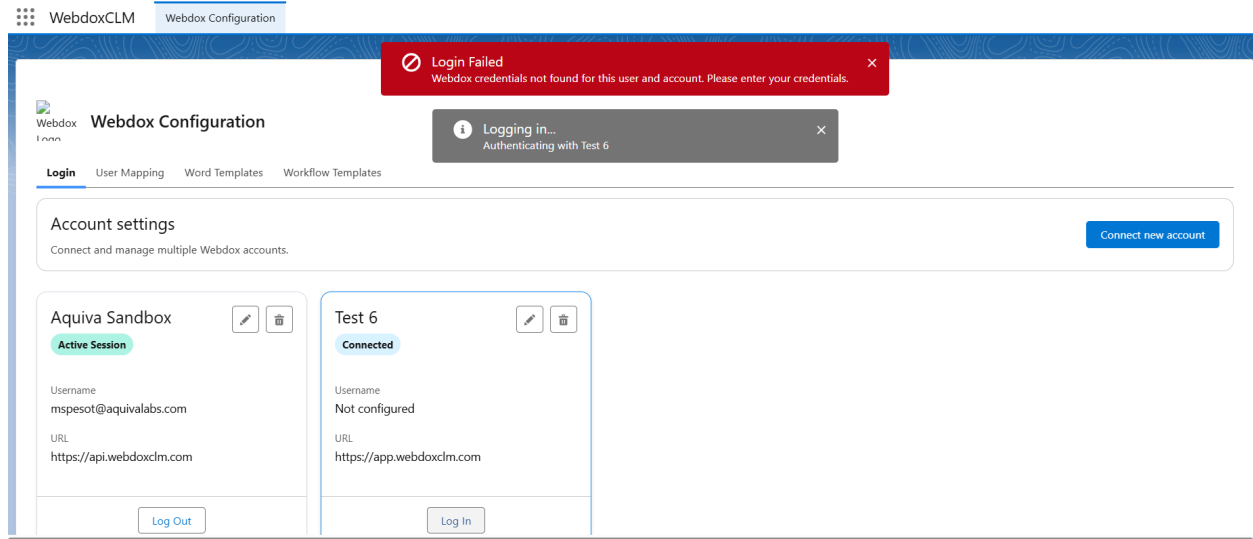


Logging in to a different account:

If you are already logged in to one account and click Log In on another, the system will automatically log you out of the current account and log you in to the newly selected one.

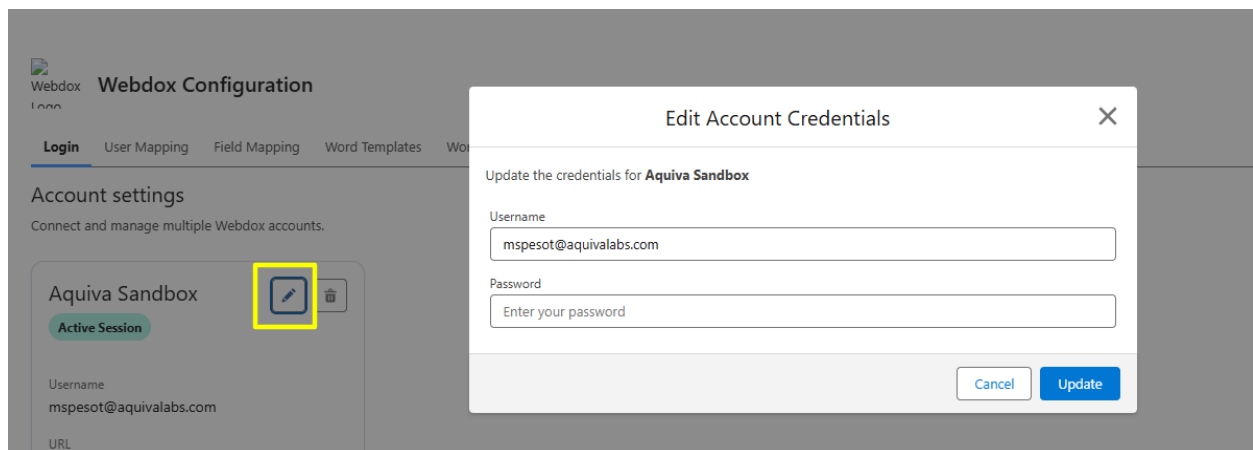
Connection Error

If the account credentials are changed in Webdox but not updated in Salesforce, an error message will appear: “Connection Issues”, and you will be logged out of the current account.



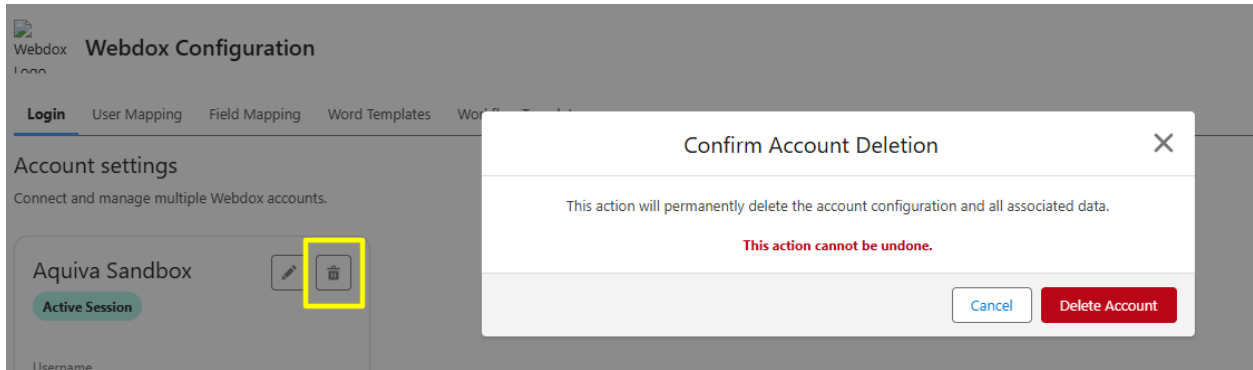
How to Resolve:

Click the Edit button, update the Username and Password with the current credentials from Webdox, then click Log in again.



Deleting an Account

When you click the **Delete** button, a confirmation dialog will appear with the message: “**Confirm Account Deletion**”. If you proceed by clicking **Delete Account**, the account will be removed.



Once the account is deleted:

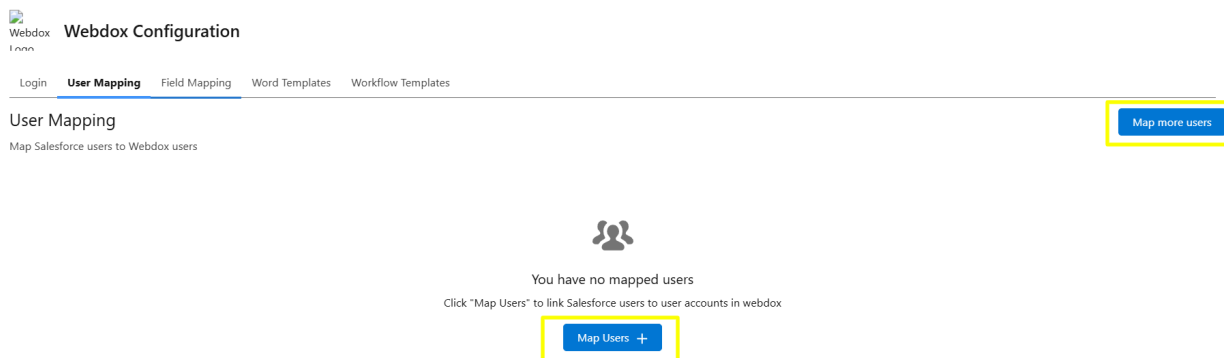
- The credentials will also be removed from **Webdox Security Config**.
- Only the **connection** to Webdox is deleted.

Step 3: User Mapping

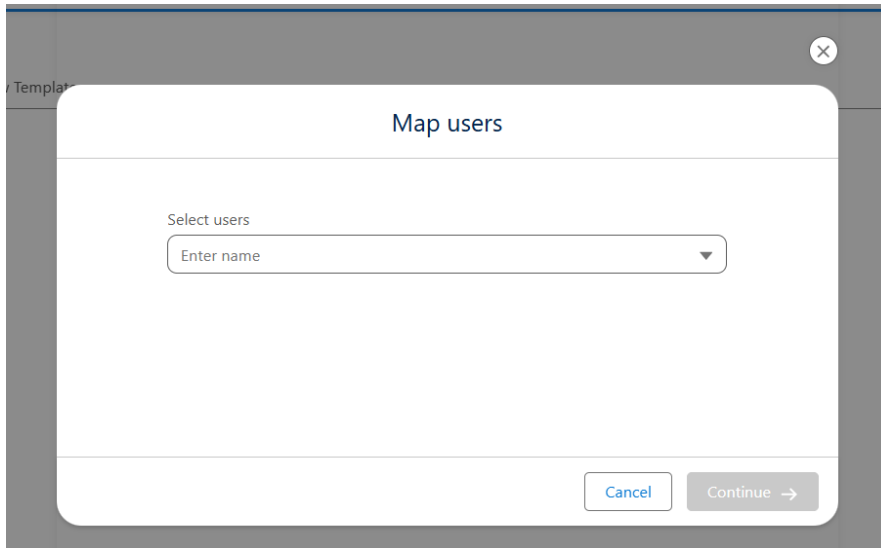
User Mapping allows administrators to define which Salesforce users will have access to Webdox and what profile they will use. This ensures the correct permissions and roles are synchronized between both systems.

Steps:

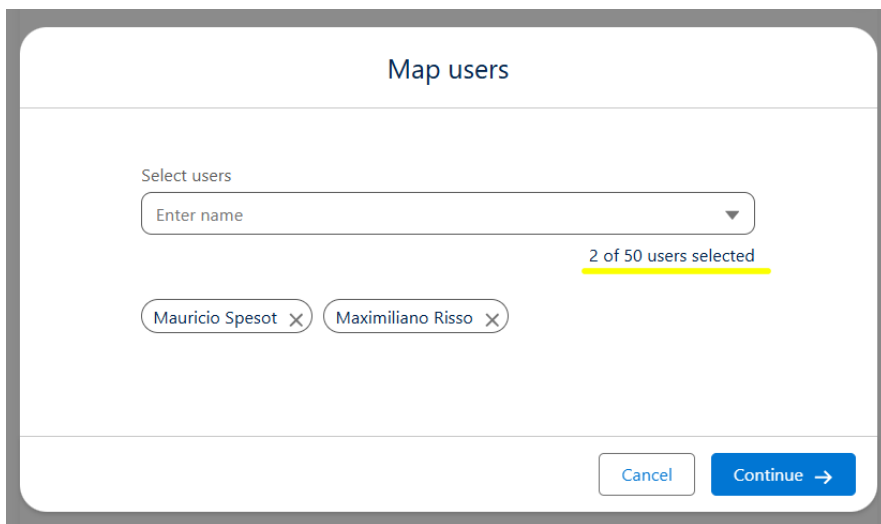
1. Go to the **User Mapping** tab and click **Map Users +** or **Map more users**.



2. Select one or more active Salesforce users.



The image shows a modal dialog box titled "Map users" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Select users" containing a text input field with the placeholder text "Enter name" and a dropdown arrow. At the bottom of the dialog, there are two buttons: "Cancel" and "Continue →".



The image shows the same "Map users" modal dialog box, but now it displays two selected users: "Mauricio Spesot" and "Maximiliano Riso", each with a close button (X). Below the input field, a status message reads "2 of 50 users selected", which is underlined in yellow. The "Continue →" button is now highlighted in blue.

Note: To maintain performance, the interface prevents the selection of more than 50 users at a time for bulk mapping. A warning message is displayed at all stages: "You can map up to 50 users at a time".

3. Assign a Webdox profile to each selected user.
 - Profiles are retrieved directly from the Webdox API.
 - You can apply the same profile to all selected users or assign it individually.

Map users

Assign a Webdox profile for each user to be created:

☐ Assign same profile to all users

Assign profile to all users
-None-

Mauricio Spesot mspesot@aquivalabs.com	Assign profile Select an Option
Maximiliano Risso mrisso@aquivalabs.com	Assign profile Select an Option

Cancel Back Finish ✓

Map users

Assign a Webdox profile for each user to be created:

☒ Assign same profile to all users

Assign profile to all users
Operador avanzado

Mauricio Spesot mspesot@aquivalabs.com	Assign profile Operador avanzado
Maximiliano Risso mrisso@aquivalabs.com	Assign profile Operador avanzado

Cancel Back Finish ✓

Workflow templates

Map users

Assign a Webdox profile for each user to be created:

☐ Assign same profile to all users

Assign profile to all users

-None-

Mauricio Spesot mspesot@aquivalabs.com	Assign profile Colaborador
Maximiliano Riso mrisso@aquivalabs.com	Assign profile Admin

Cancel Back Finish ✓

4. Click **Finish**.

Note: Records are created in Salesforce, and the request is sent to Webdox so that the corresponding user account is also created on their side.

The main view displays a **table of all mapped users**, where you can:

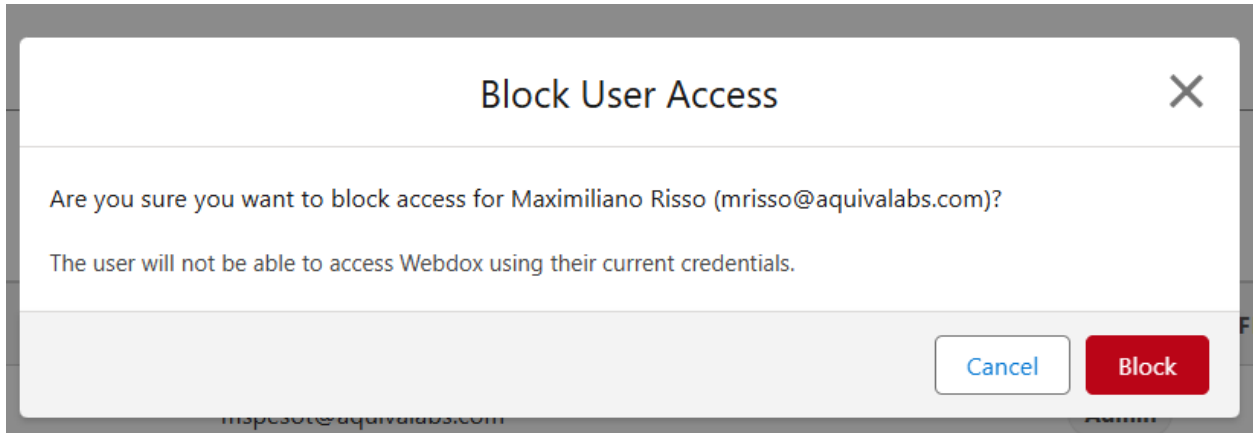
- Sort by user name or Webdox Role.
- Remove mappings individually or in bulk.

Login **User Mapping** Field Mapping Word Templates Workflow Templates

User Mapping Map more users

Map Salesforce users to Webdox users

☐	NAME	EMAIL	WEBDOX PROFILE	
☒	Mauricio Spesot	mspesot@aquivalabs.com	Admin	☐
☐	Maximiliano Riso	mrisso@aquivalabs.com	Operador avanzado	☐



Note: If a user is deleted from Salesforce, they will be blocked from Webdox.

Step 4: Template and Field Mapping

Templates and Field Mapping define how Salesforce data connects with Webdox workflows. Administrators can upload Word templates, enable workflow templates, and decide how fields from Salesforce objects map to Webdox attributes.

Field Mapping:

An administrator can map Webdox Attributes with Salesforce objects and fields. This is an object-level mapping (applies to all templates).

- Go to the **Field Mapping** tab and click on “Origin Salesforce Object”.



- Once an object is selected, three columns will be displayed: “**Webdox Attribute**”, “**Salesforce Object**”, and “**Salesforce Field**”.

Origin Salesforce Object:

Opportunity

Webdox Attribute	Salesforce Object	Salesforce Field
client	Select Salesforce Object	Select Salesforce Field
topic	Select Salesforce Object	Select Salesforce Field
subject	Select Salesforce Object	Select Salesforce Field
container	Select Salesforce Object	Select Salesforce Field

- Once a **Salesforce object** is selected, the corresponding **Salesforce Field** will become available for selection.

Origin Salesforce Object:

Opportunity

Webdox Attribute	Salesforce Object	Salesforce Field
client	Account	Select Salesforce Field
topic	Select Salesforce Object	
subject	Select Salesforce Object	
container	Select Salesforce Object	
Cargo del Trabajador	Select Salesforce Object	

Account Rating
Account Source
Account Type
Active
Billing Geocode Accuracy
Customer Priority
Industry
Ownership

- Once the Field Mapping is finished, click **“Save Changes”**.
- Once a Field Mapping is saved, the administrator can select it again and add more mappings.

Word Templates:

It is a Document-specific and applies to the selected Word template only.

- Go to the **Word Templates** tab.
- Upload a **.docx** file by clicking **“Add Word Template”**.

Webdox Configuration

Login User Mapping Field Mapping **Word Templates** Workflow Templates

Create a Word Template

Upload a template from your computer

Upload a custom Word template (.docx) from your local machine to use in your Webdox workflows

OR

Select a Word template from Webdox

Choose an existing template from your Webdox account to reuse in Salesforce

Select a template... Use Template

Upload Document

Drag and drop the file here

Allowed formats:

Only Word documents (.docx) are accepted

Select from PC

Cancel Upload

- Or choose an existing template from Webdox.

Select a Word template from Webdox

Choose an existing template from your Webdox account to reuse in Salesforce

- The system extracts the merge fields from the document. These merge fields can later be mapped to Salesforce fields.
- After the merge fields are extracted, the **Field Mapping Interface** opens inside the Document tab.

Note: If the system extracts no merge fields from the uploaded file, a user-friendly error is displayed, indicating that no merge fields were detected.

Options:

Document Mergefield | Webdox Attribute | Salesforce Object | Salesforce Field.

Mergefield Status: All merge fields are displayed as disabled/read-only labels.

Flexible Mapping: An Administrator can map:

- A document merge field to a **Webdox Attribute** without selecting a Salesforce Object/Field.
- A document merge field to a **Salesforce Object/Field** without selecting a Webdox Attribute.
- To **both** a document attribute AND a Salesforce Object/Field.

Pre-population Logic: If the selected Webdox Attribute is one that has already been mapped in the separate global Attribute Mapping (see Workflow Snapshot), the corresponding Salesforce Object and Salesforce Field values will automatically populate and are shown as disabled/read-only.

Selected Word Template from Webdox:

Contrato Largo

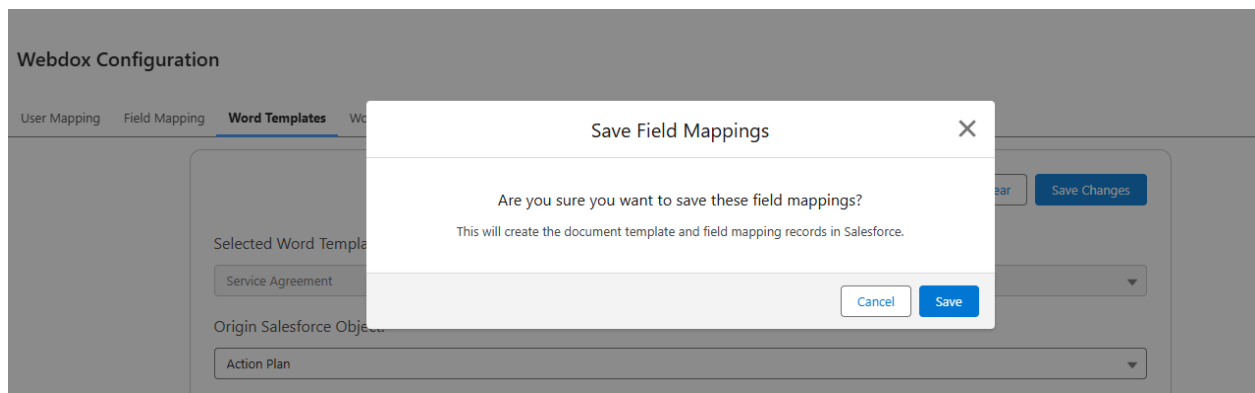
Origin Salesforce Object:

Action Plan

Document Mergefield	Webdox Attribute	Salesforce Object	Salesforce Field
Cargo_del_Trabajador	--Select--	Select Salesforce Object	Select Salesforce Field
Duración_del_Contrato	--Select--	Select Salesforce Object	Select Salesforce Field
Fecha_de_Inicio	--Select--	Select Salesforce Object	Select Salesforce Field

Save and Activate:

- When you click **Save Changes**, Salesforce stores the mapping.
- The mapping is specific to the current account and template.
- Once saved, the Word template is active and ready to generate documents with Salesforce data.



Workflow Templates:

Workflow Templates are created in Webdox (not Salesforce), and once they are enabled, they become available for Salesforce users to select, although they cannot be edited from Salesforce.

- Go to the **Workflow Templates** tab.
- Two columns are shown:
 - *Webdox Workflow Templates*

- *Templates in Salesforce*

Login User Mapping Field Mapping Word Templates **Workflow Templates**

Workflow Templates

Select the Webdox workflow templates to be used from Salesforce.

Webdox Workflow Templates (10)

+ Add

Search by name...

Select All

Como funcionan los formularios

Template De Prueba

Webhook 1

Templates in Salesforce (0)

Remove

Search by name...

No Available Templates

No workflow templates found or none match your search criteria.

- Select an item from the Webdox Workflow Templates column and click on “+ **Add**”.

Workflow Templates

Select the Webdox workflow templates to be used from Salesforce.

Webdox Workflow Templates (10)

+ Add

Search by name...

Select All

Como funcionan los formularios

Template De Prueba

Webhook 1

Templates in Salesforce (0)

Remove

Search by name...

No Available Templates

No workflow templates found or none match your search criteria.

Workflow Templates

Select the Webdox workflow templates to be used from Salesforce.

Webdox Workflow Templates (9)

+ Add

Search by name...

Select All

Template De Prueba

Templates in Salesforce (1)

Remove

Search by name...

Select All

Como funcionan los formularios

- The item will be moved to the next column.

Note: If you want to remove the template, select the item and click on “- Remove”.

Step 5: Workflow Execution and Monitoring

End-users (with the WebdoxCLM - User permission set) will typically execute workflows, but admins should understand the process.

Start a Workflow

From a Salesforce record (e.g., an Opportunity), users can initiate an enabled workflow. If multiple accounts exist, you will be prompted to select one. You can access any object and view the Start a workflow section, as long as it is mapped to that object.

The screenshot shows a web interface with two tabs: 'Activity' and 'Details'. The 'Activity' tab is active. Below the tabs, there is a section titled 'Start a Workflow' with a blue 'W' icon. This section is highlighted with a yellow border. Below this, there is a form titled 'ACCOUNT SELECTION'. Inside the form, there is a label 'Account' above a dropdown menu that says 'Select an account'. To the right of the dropdown is a 'Next' button.

- Before starting, you will see the name of the account you are currently logged into displayed in the top-right corner of the interface. This helps you confirm you are working in the correct account.
- Next to the account name, a **Switch Account** button is available. Clicking it will open a pop-up warning you that "Switching accounts will discard unsaved changes". If you confirm, you will be redirected to the account selection screen.

W Start a Workflow Matías Moreira [Switch account](#)

1 — 2 — 3
Workflow details Document signer Field mapping

WORKFLOW DETAILS

Select workflow template:
Select a template ▼

Enter workflow name:
Enter workflow name

[Cancel](#) [Next](#)

Select a Workflow Template and Name It

- To begin, you'll select a workflow template from a dropdown list. These templates are pre-enabled for Salesforce use by an admin.
- You must also enter a name for the workflow, which is a required field. If no templates are available, the system will display an error message. You can only proceed to the next step after selecting a template and providing a name.

W Start a Workflow Aquiva Sandbox [Switch account](#)

1 — 2 — 3
Workflow details Document signer Field mapping

WORKFLOW DETAILS

Select workflow template:
Template De Prueba ▼

Enter workflow name:
Test

[Cancel](#) [Next](#)

- While creating the workflow, a horizontal progress tracker at the top of the interface will show your progress. The two main steps are **"Cycle details"** and **"Document signer"**. The current step will be highlighted and numbered, while completed steps will show a visual confirmation like a checkmark.

Activity
Details

W
Start a Workflow

Matias Moreira
Switch account

✓
Workflow details

✓
Document signer

3
Field mapping

Add and Manage Document Signers

- You can add one or more signers by clicking the **Add new signer** button.

Activity
Details

W
Start a Workflow

Matias Moreira
Switch account

✓
Workflow details

2
Document signer

3
Field mapping

DOCUMENT SIGNERS
Add new signer

No signers added yet - Add new signer

Cancel
Back
Next

Activity
Details

W
Start a Workflow

Matias Moreira
Switch account

✓
Workflow details

2
Document signer

3
Field mapping

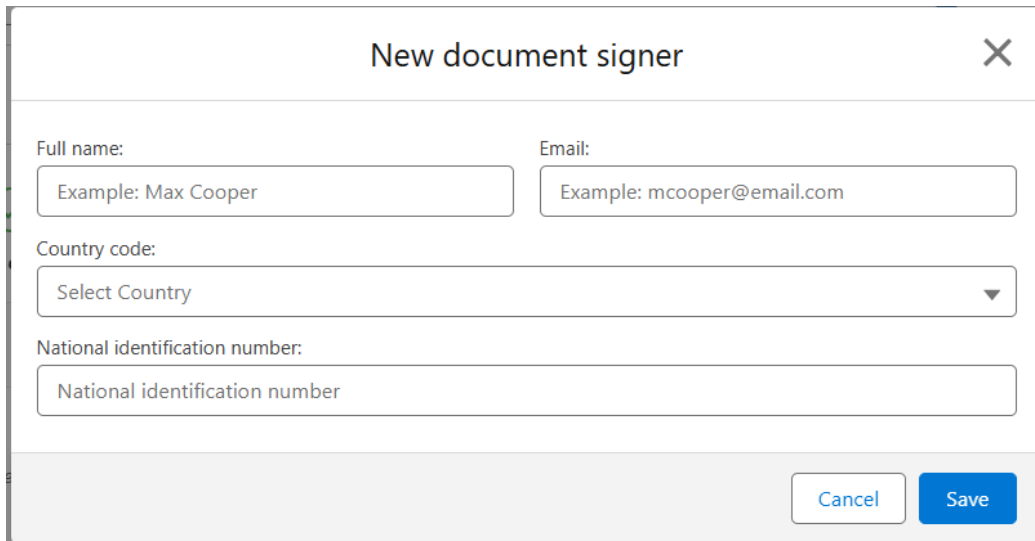
DOCUMENT SIGNERS
Add new signer

Test (Test@test.com)

Cancel
Back
Next

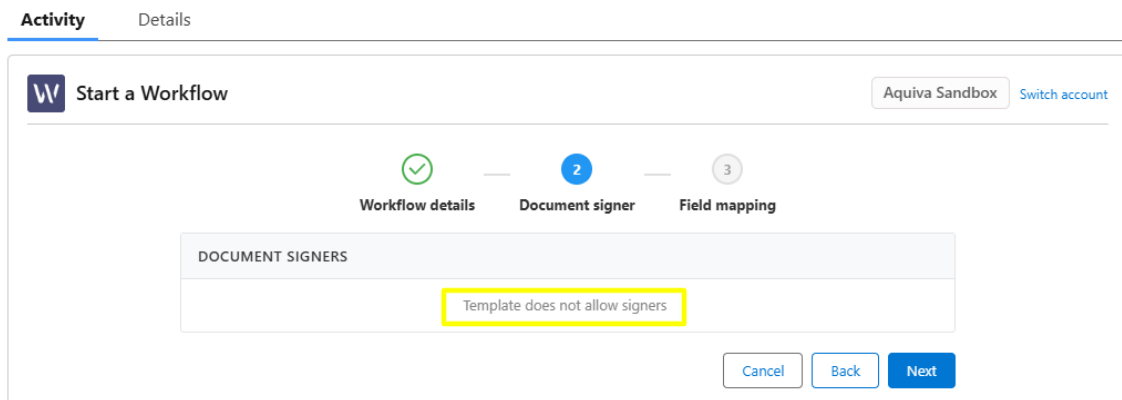
Each signer requires:

- Full name
- Email
- Country code (the country code is selected from a dropdown list).
- National identification number.



A modal form titled "New document signer" with a close button (X) in the top right corner. The form contains four input fields: "Full name:" with the example "Example: Max Cooper", "Email:" with the example "Example: mcooper@email.com", "Country code:" with a dropdown menu showing "Select Country", and "National identification number:" with the placeholder "National identification number". At the bottom right, there are two buttons: "Cancel" and "Save".

- The system validates all signer fields for format and completeness.
- You can review, edit, and remove signers before proceeding.
- If the workflow doesn't require signers, you can proceed without adding them.



A screenshot of the "Start a Workflow" interface. At the top, there's a header with the "W" logo, "Start a Workflow", and links for "Aquiva Sandbox" and "Switch account". Below the header is a progress bar with three steps: "Workflow details" (marked with a green checkmark), "Document signer" (marked with a blue circle containing the number 2), and "Field mapping" (marked with a grey circle containing the number 3). Under the "Document signer" step, there's a section titled "DOCUMENT SIGNERS" which contains a message "Template does not allow signers" highlighted with a yellow border. At the bottom right, there are three buttons: "Cancel", "Back", and "Next".

- If the chosen name is a duplicate, an error message will be displayed.

Note: The ability to add or edit existing signers becomes disabled after the workflow passes the signing step.

Webdox Configuration * Burlington Textiles Weavin... ▼ ✕

Textiles Weaving Plant Generator

✓ — 2

Cycle details

Document signer

DOCUMENT SIGNERS

[Add new signer](#) ✉

No signers added yet - [Add new signer](#) ✉

Cancel

Back to Cycle Details

Create workflow

- The last step will be the **Field Mapping**.

W Start a Workflow Matías Moreira [Switch account](#)

✓ — ✓ — 3

Workflow details

Document signer

Field mapping

FIELD MAPPING

ATTRIBUTE NAME	VALUE
client	Purchased List
topic	Pipeline
subject	
container	
Cargo del Trabajador	
Ciudad	
Ciudad o Provincia	
Domicilio del Empleador	

Tracking Workflow Progress

Once a workflow is created, you will be redirected to the **Webdox Status** page, Workflow Details. A success message will confirm that the workflow was created successfully.

This page serves as a central hub for monitoring progress in real-time. The status component displays:

- **Workflow name:** The name you entered during creation.
- **Status:** The current status of the workflow, such as *"In progress"*.
- **Current step name:** The descriptive name and number of the current step (e.g., "Electronic signature (#4)").
- **Responsible person:** The name of the user assigned to the workflow (e.g., "Nicole Smith").

Note: If you are the assigned "Responsible" for the workflow and it requires signers, a warning message will appear: *"This workflow requires signers. Signers can be added in this screen or in Webdox"*.

The screenshot shows the 'Webdox Status' interface. At the top right, it says 'Matias Moreira' with a 'Switch account' link. The main section is titled 'WORKFLOW DETAILS' with a 'Refresh from Webdox' link. Below this, there are four boxes: 'Workflow name' (Test4572), 'Status' (Pending), 'Current step name (number)' (Primer Paso (1)), and 'Responsible' (Priscila Velazquez). Below these is the 'DOCUMENT SIGNERS' section, which shows 'Signing step: Primer Paso (1)' and an 'Add new signer' link. A list of signers is shown with 'Test (test@test.com)' as the only entry, with edit and delete icons. Below that is the 'DOCUMENTS AND ATTACHMENTS' section with an 'Add documents' link. It shows two sub-sections: 'Documents' with 'No documents available' and 'Attachments' with 'No attachments available'.

Uploading Documents and Attachments

- The page also includes dedicated sections for **Documents and attachments**, and **Signers**.
- **Upload files from computer:** You can upload files from your local machine. Supported file formats for documents and attachments include .CSV, .DOCX, DOC, JPEG, MSG, PFX, PNG, PPTX, PPT, TXT, XLSX, and XLS. The maximum file size limit is 200MB.

DOCUMENT SIGNERS

Signing step: Primer Paso (1)

Add new signer

Test (test@test.com)

DOCUMENTS AND ATTACHMENTS

Add documents

Documents

No documents available

Attachments

No attachments available

Add document

Add attachment

Upload documents

Upload files

Use template

Upload Files

Or drop files

Allowed formats: CSV, DOCX, DOC, JPEG, JPG, MSG, PDF, PFX, PNG, PPTX, PPT, TXT, XLSX, XLS

Files up to 3MB are processed immediately. Larger files are processed in background and you'll receive a notification when complete.

Cancel

Confirm

- Attachments can be downloaded from Webdox before the document is signed. Once the document is signed, the signed version becomes available for download.

- When a workflow is completed in Webdox, a webhook is sent to Salesforce. This webhook does not update the workflow status in Salesforce—the status is already included in the initial data sent by Webdox.
- Instead, the webhook updates the Document Snapshot and includes the document classification if the document was classified according to the final mapping defined in Webdox.
- If the classification or snapshot information does not appear immediately, users can click “Refresh from Webdox” to retrieve the latest data, including the document’s classification when available.

Multi-Language Support

The Webdox app supports English, Spanish, and Portuguese. The language shown will depend on the **Salesforce user's language setting**. No extra configuration is required, but admins should ensure end-users know how to change their preferred language in Salesforce if needed.