WEBDOX

Admin & User Documentation

V1.0

AQUIVA LABS

Version History

Version	Date	Author	Description
1.0			Initial version

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

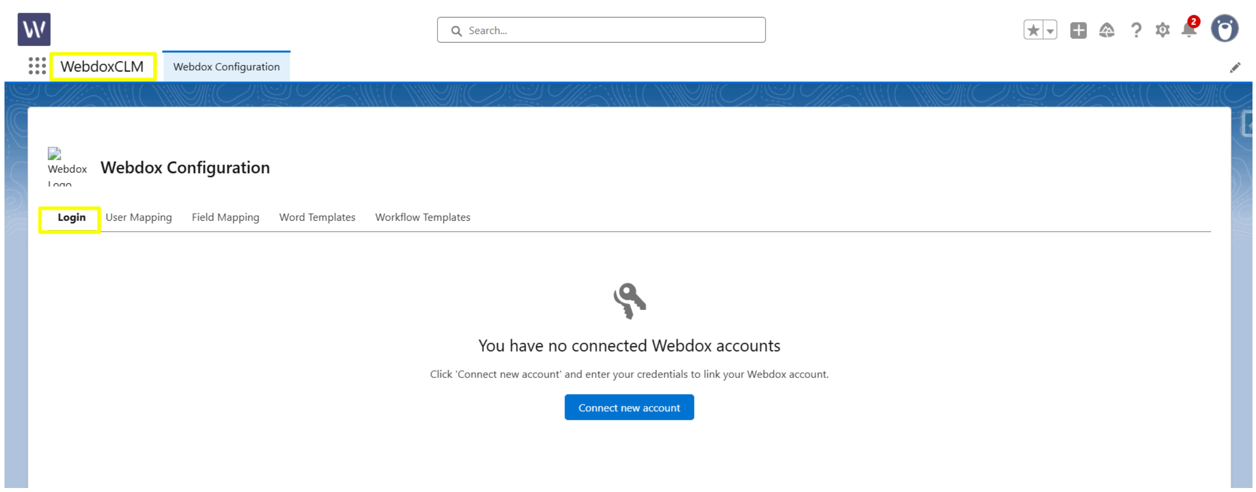
To begin the setup process, you must follow the steps below. Each step will guide you through the required actions to complete the configuration successfully.

Step 1: Connect Your First Webdox Account

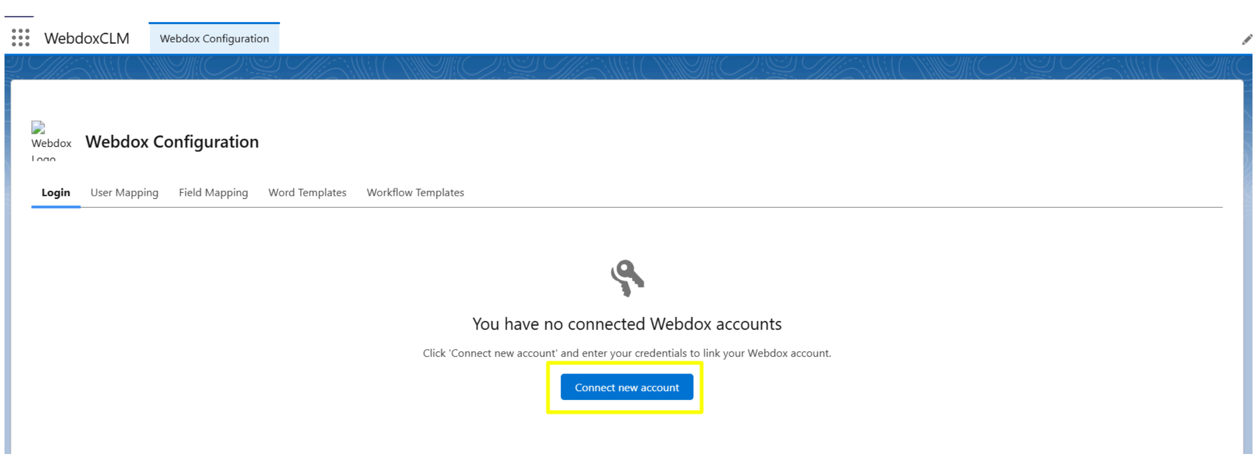
To start using Webdox inside Salesforce, the first step is to connect at least one Webdox account. This creates a secure link between both systems and allows administrators to manage workflows, templates, and users directly from Salesforce. The following manual steps need to be completed for each account.

Steps:

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

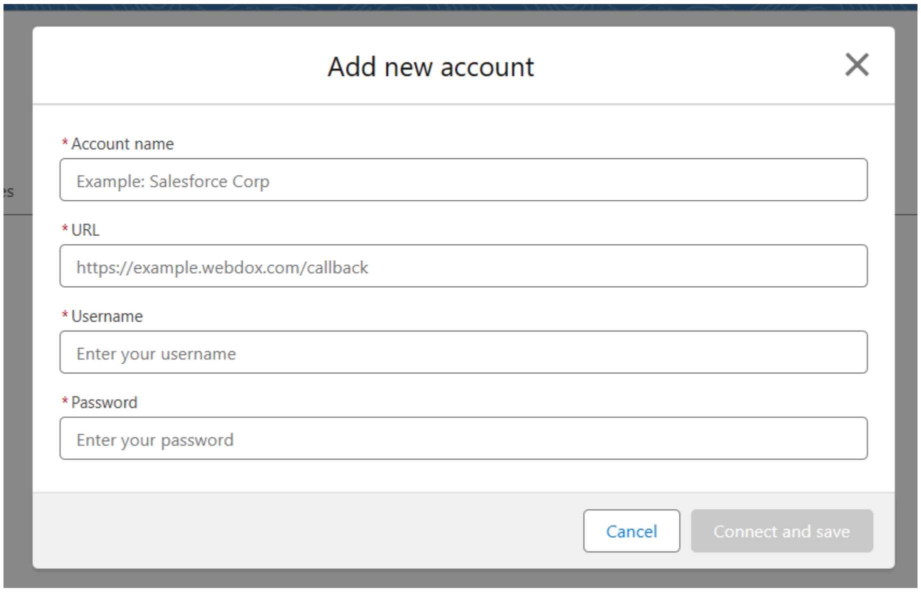


2. Click **Connect New Account**.

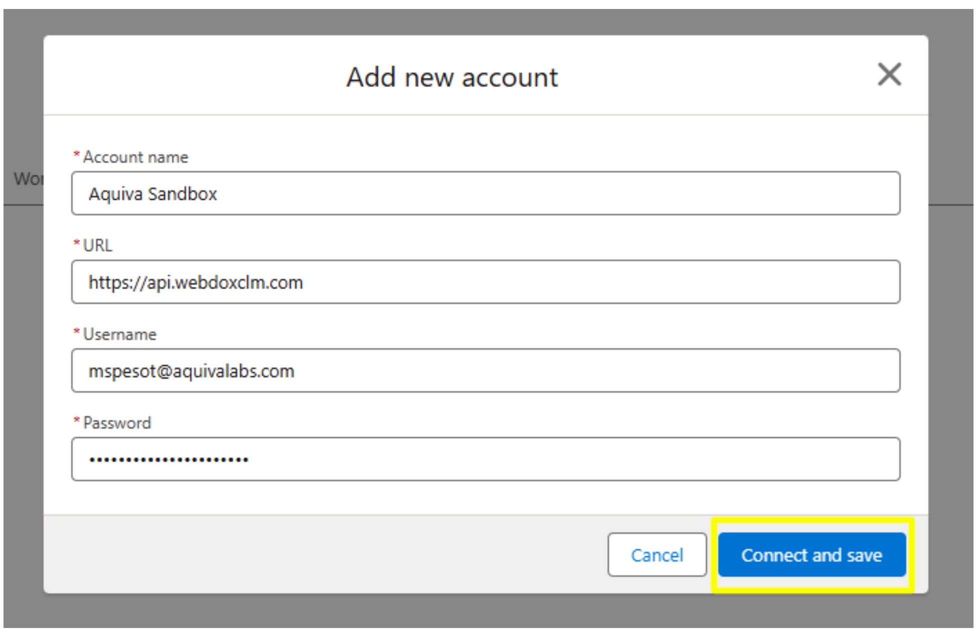


3. In the pop-up window, enter:

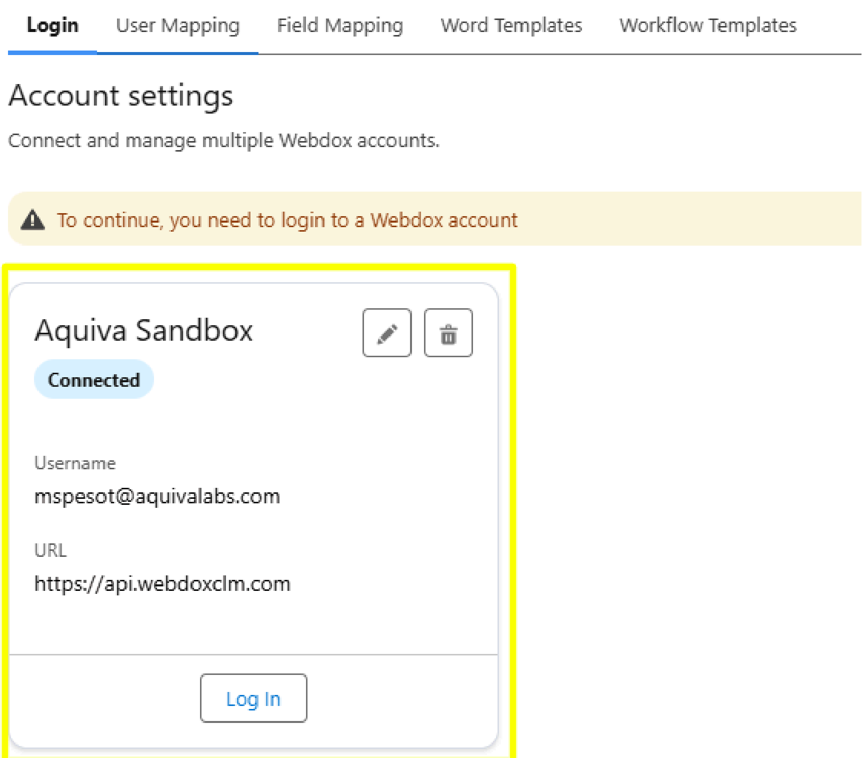
- **Account Name**
- **Redirect URL** (https://) API URL
- **Username** (email format)
- **Password** for the Webdox account



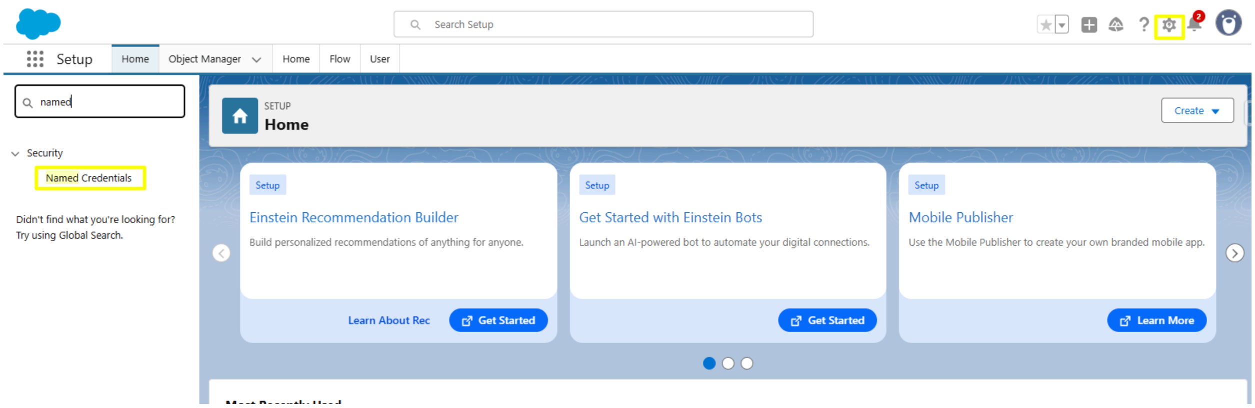
4. Click **Connect and save**.

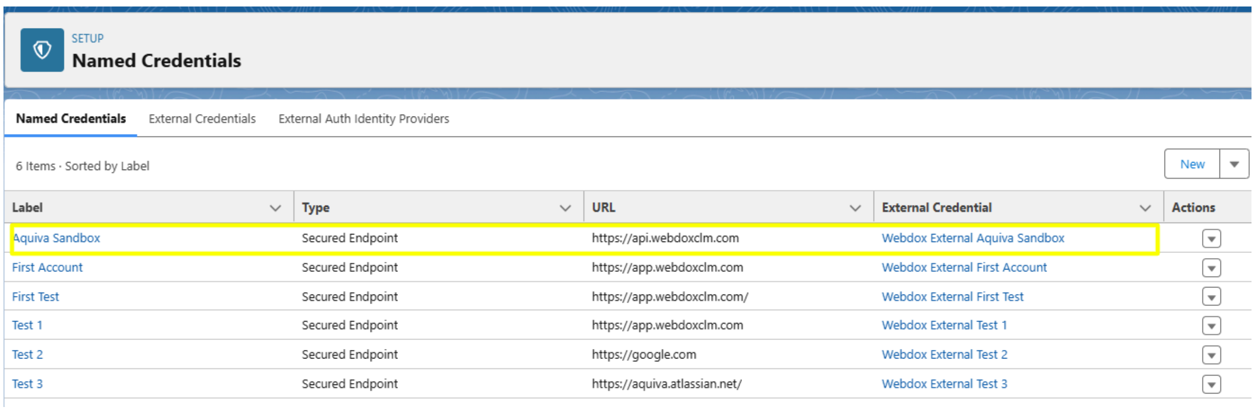


This will create the account connection and store the login securely.

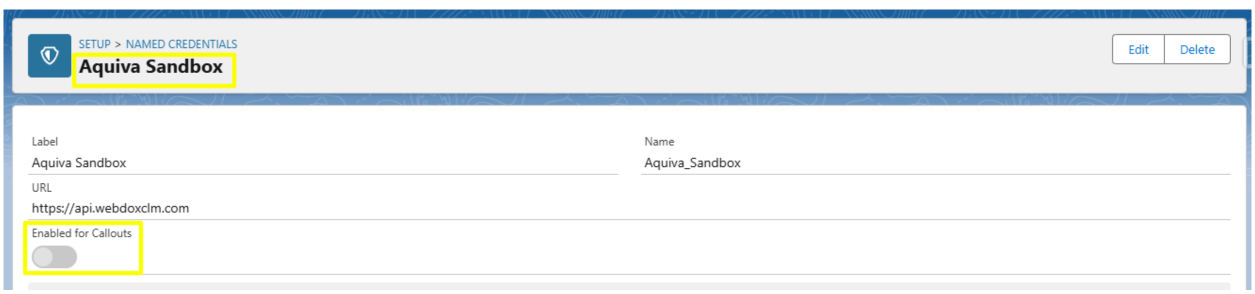


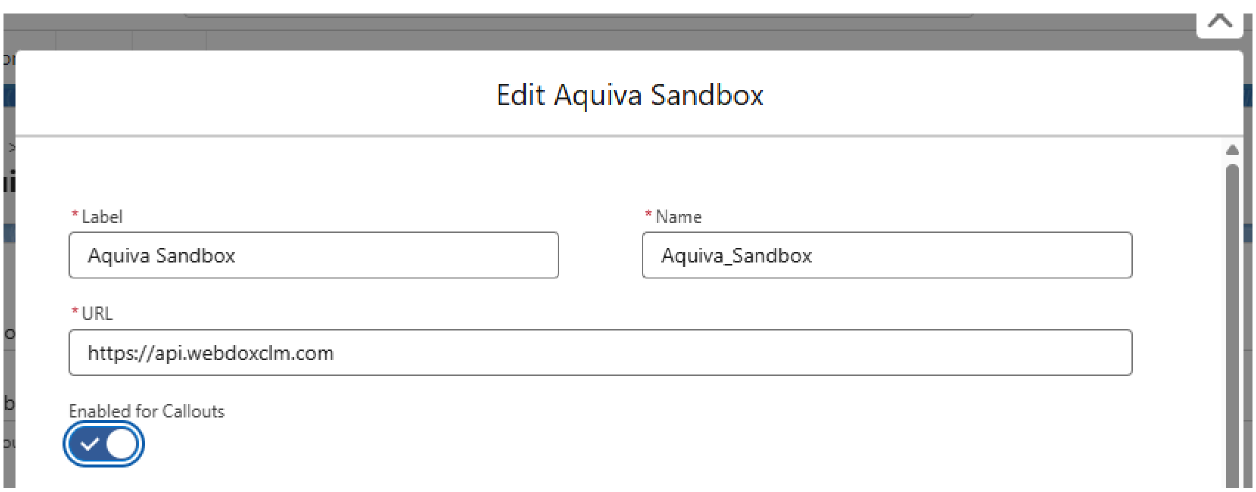
5. Open the newly created **Named Credential** in Salesforce and **enable for callout**.





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	

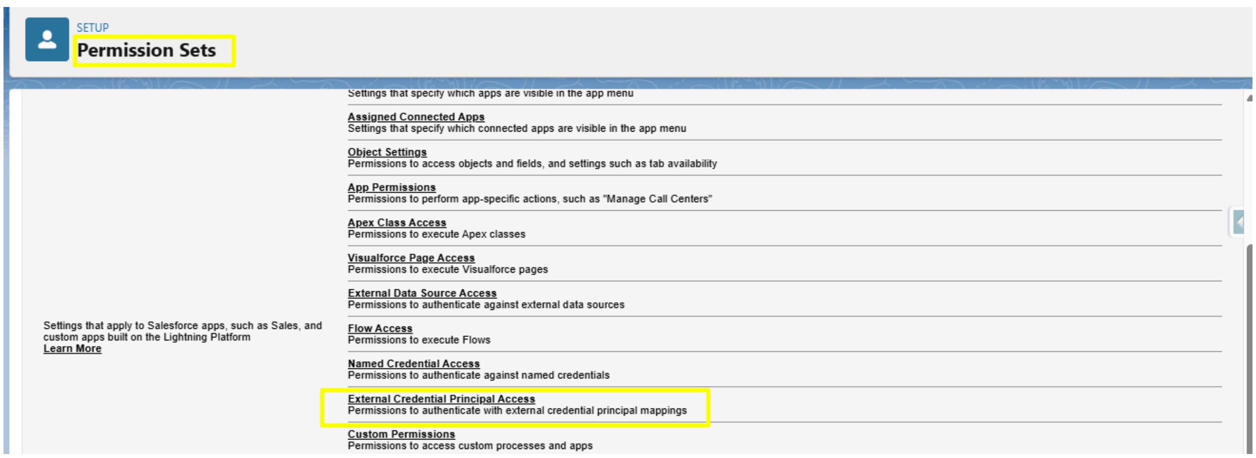


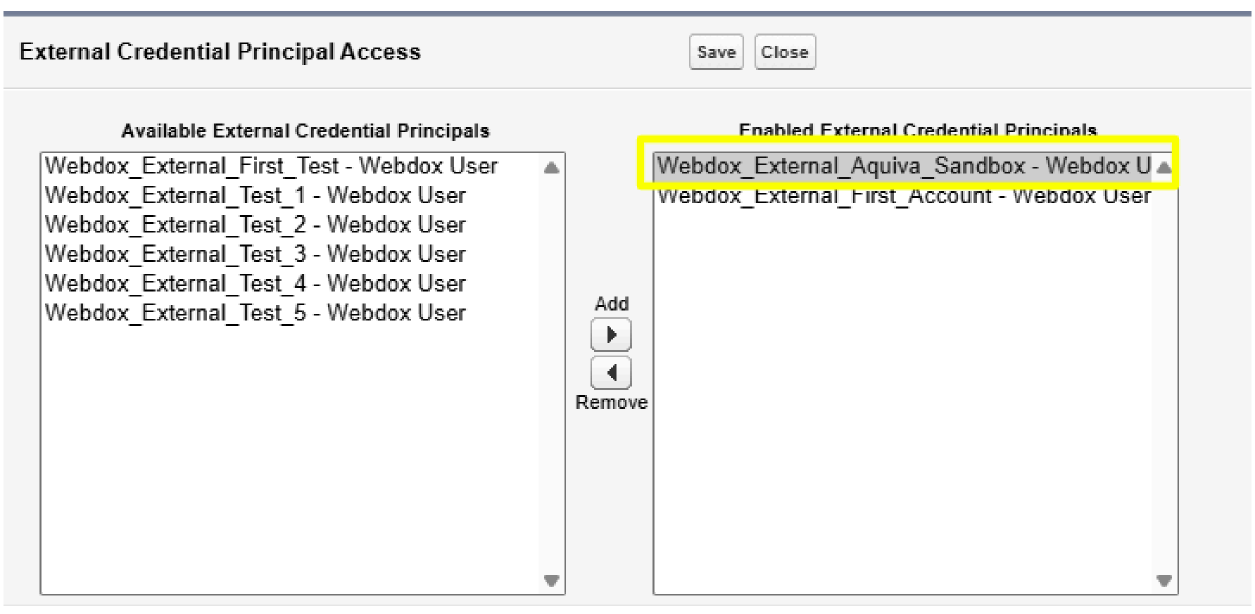


Final step: Since packaged Permission Sets cannot be edited, you need to create a new Permission Set to add the required external credential access:

- Create a new Permission Set (e.g., "Webdox 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.





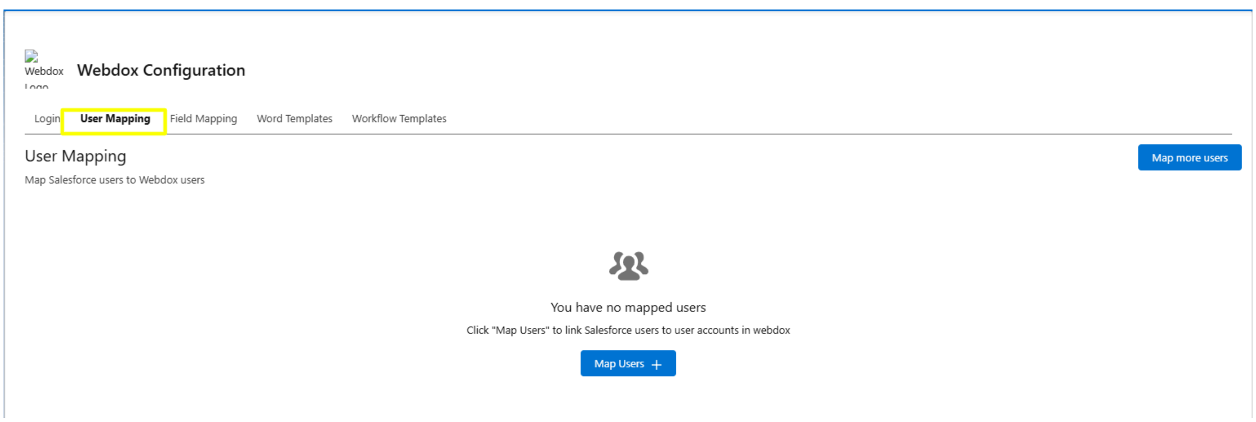
Once finished, your Webdox account is connected to Salesforce and the user's credential will be stored in the Custom Settings **“Webdox Security Config"**. This custom setting is not accessible to any user.

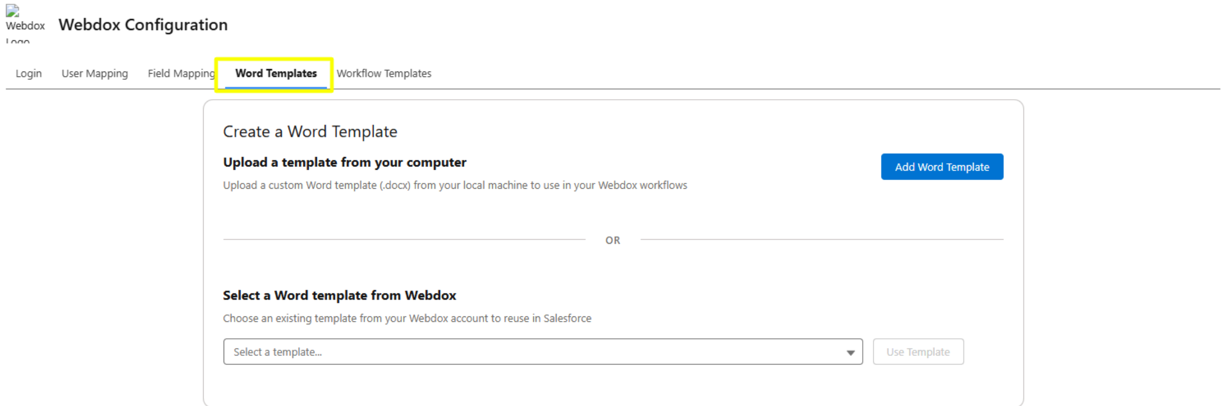
Step 2: Manage Accounts and Sessions

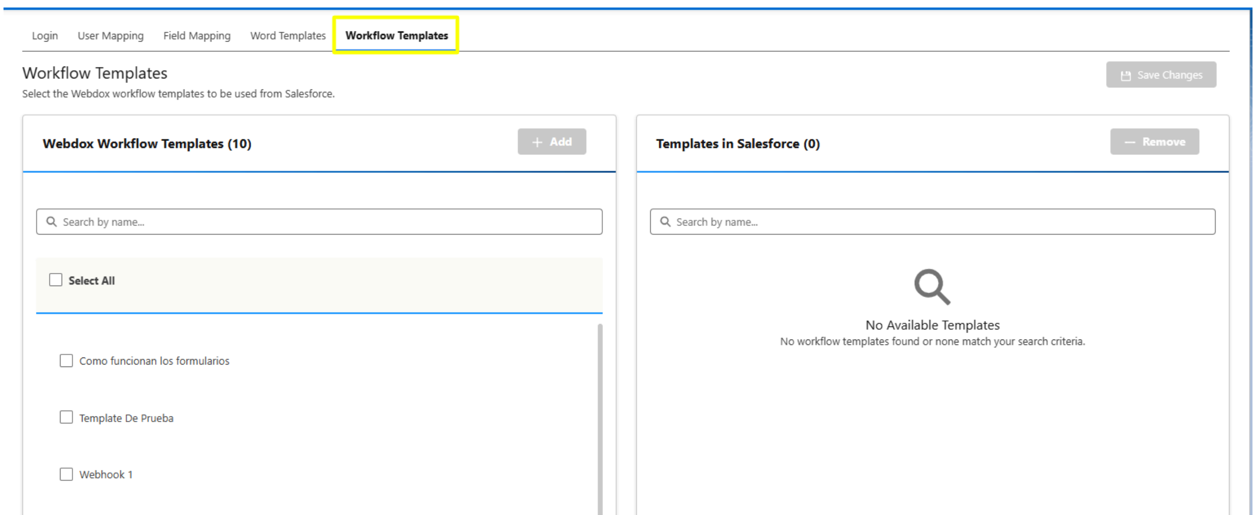
After you connect one or more Webdox accounts, you can view and manage them from the **Login** tab. From here, you can:

- 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**.

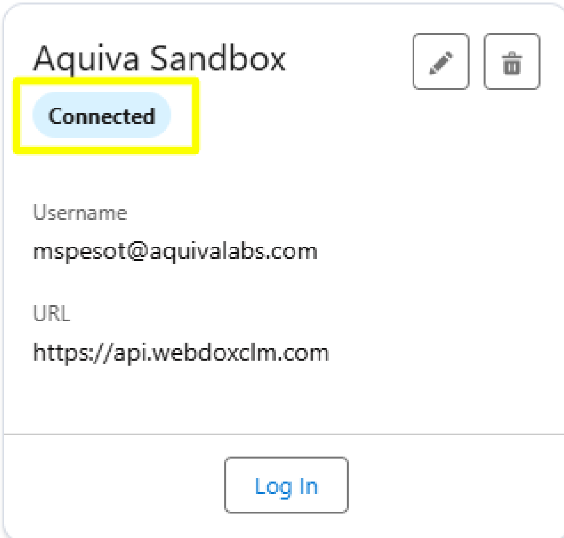




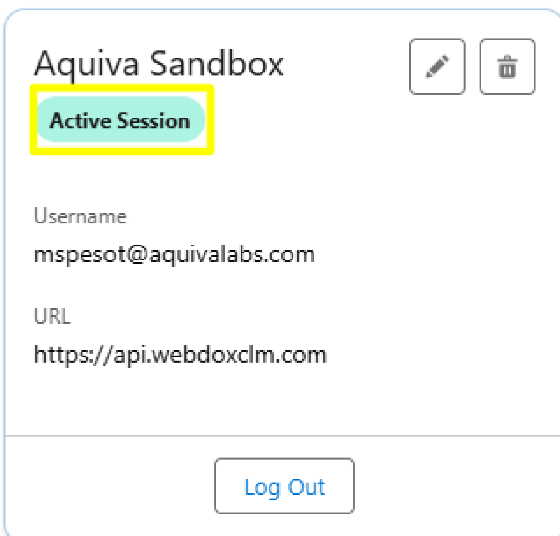


Also, each connected account appears as a **card** in the Login tab.

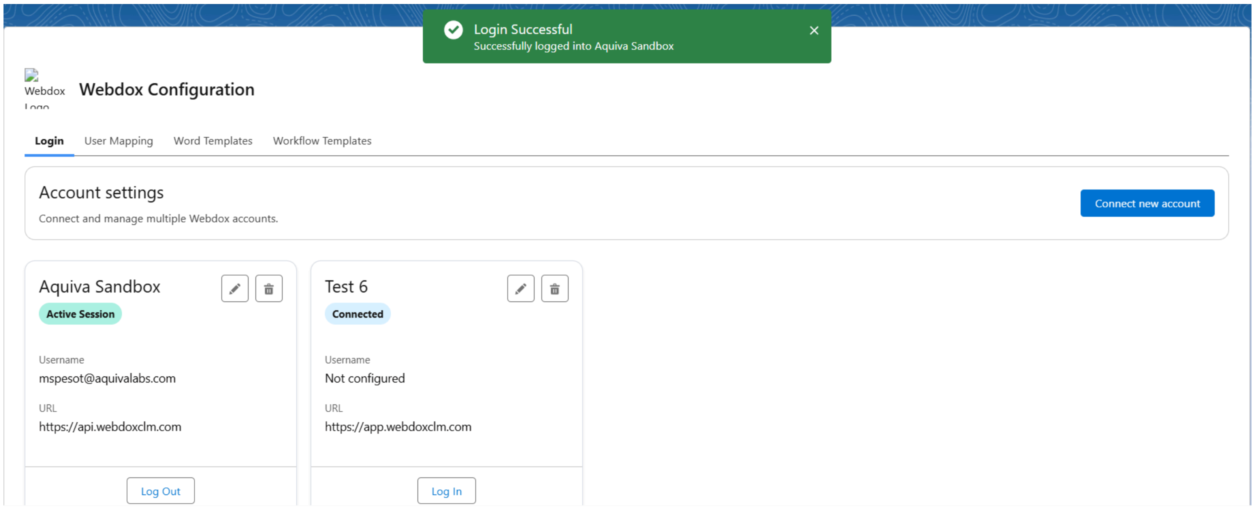
- Statuses:
    - **Connected** → Linked but not logged in.



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



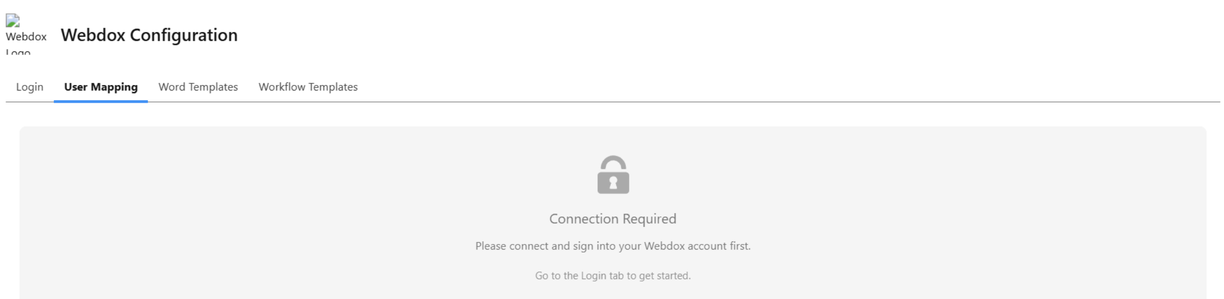
Once the account is logged in, a success message will appear.



- 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.

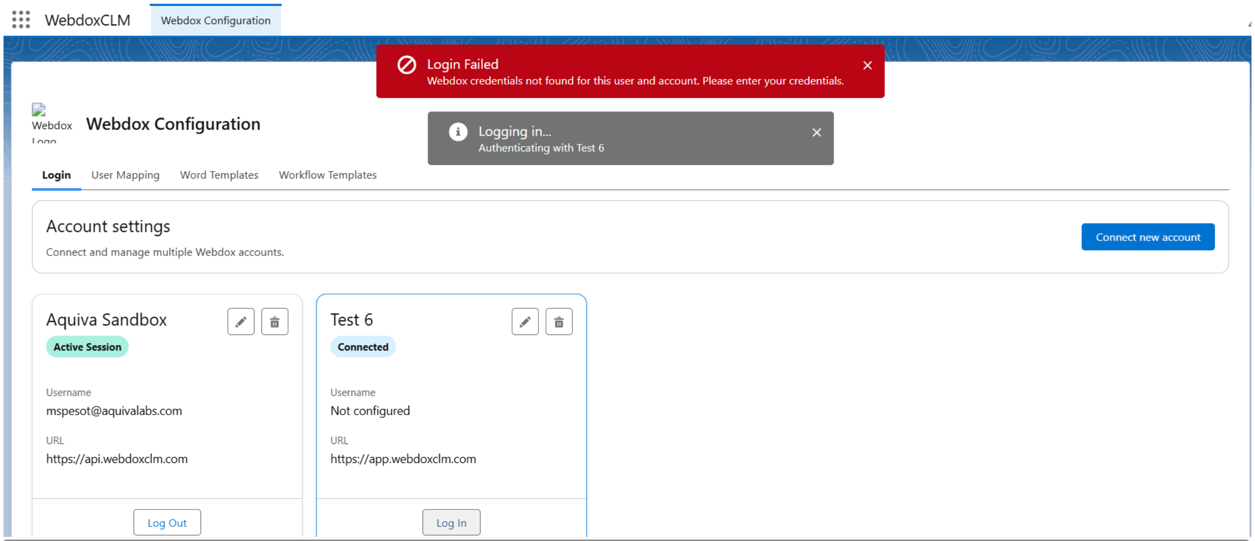


Logging in to a different account:

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.

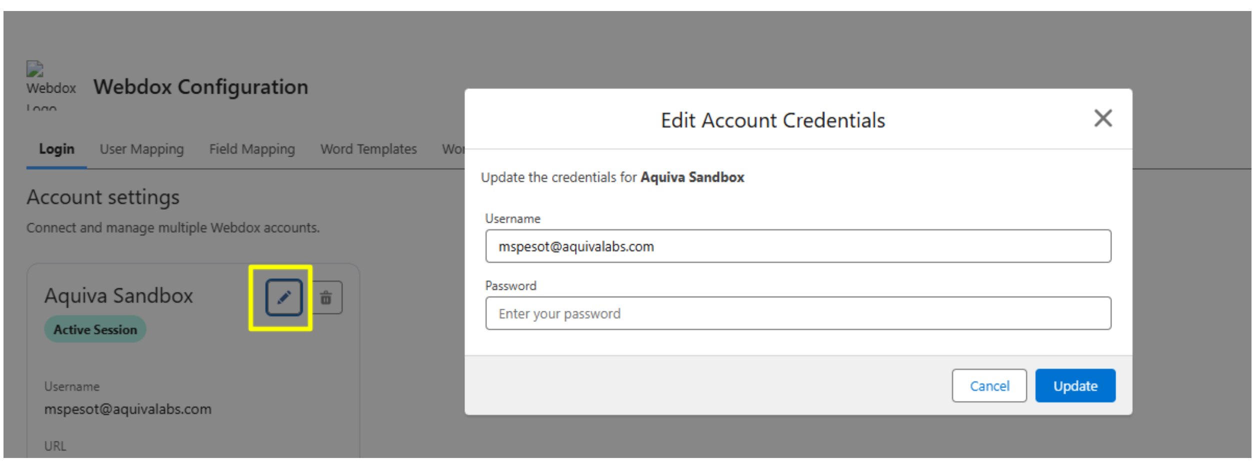
Connection Error

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.



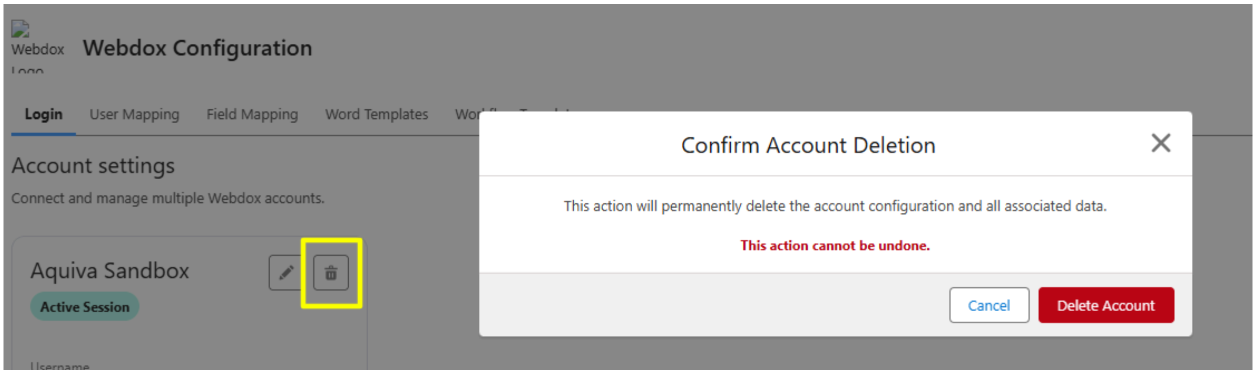
How to Resolve:

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:

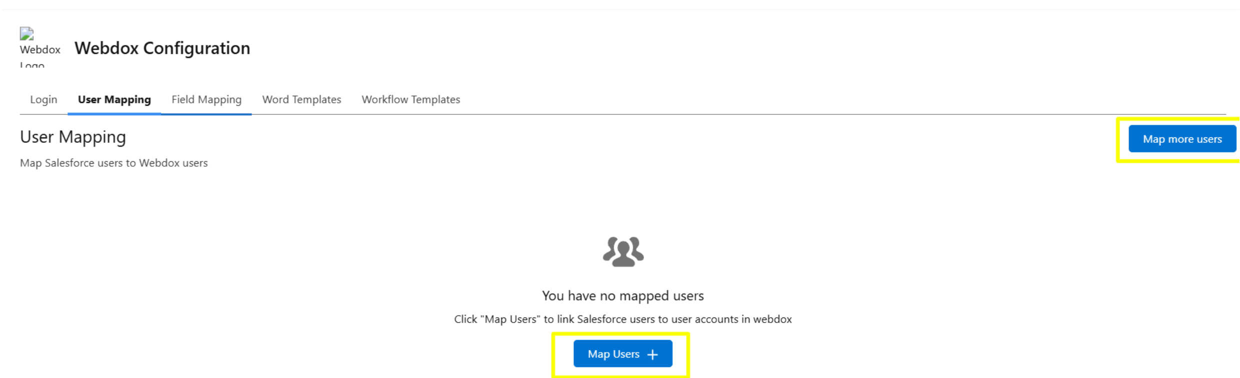
- The credentials will also be removed from **Webdox Security Config**.
- Only the **connection** to Webdox is deleted.

Step 3: User Mapping

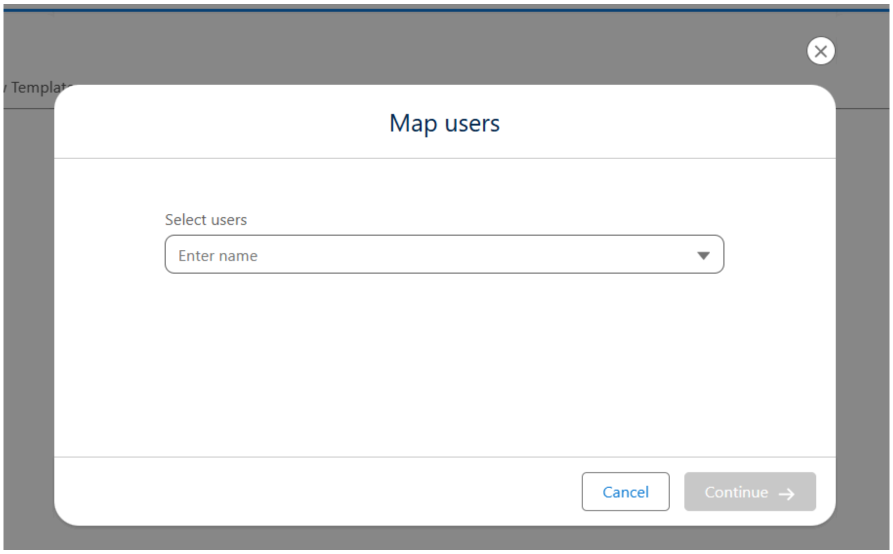
User Mapping allows administrators to define which Salesforce users will have access to Webdox and what profile they will use. This ensures the correct permissions and roles are synchronized between both systems.

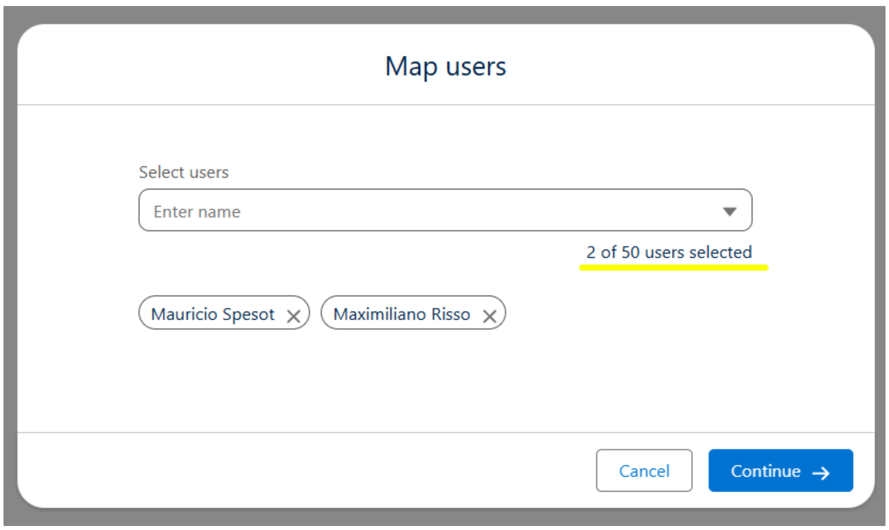
Steps:

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



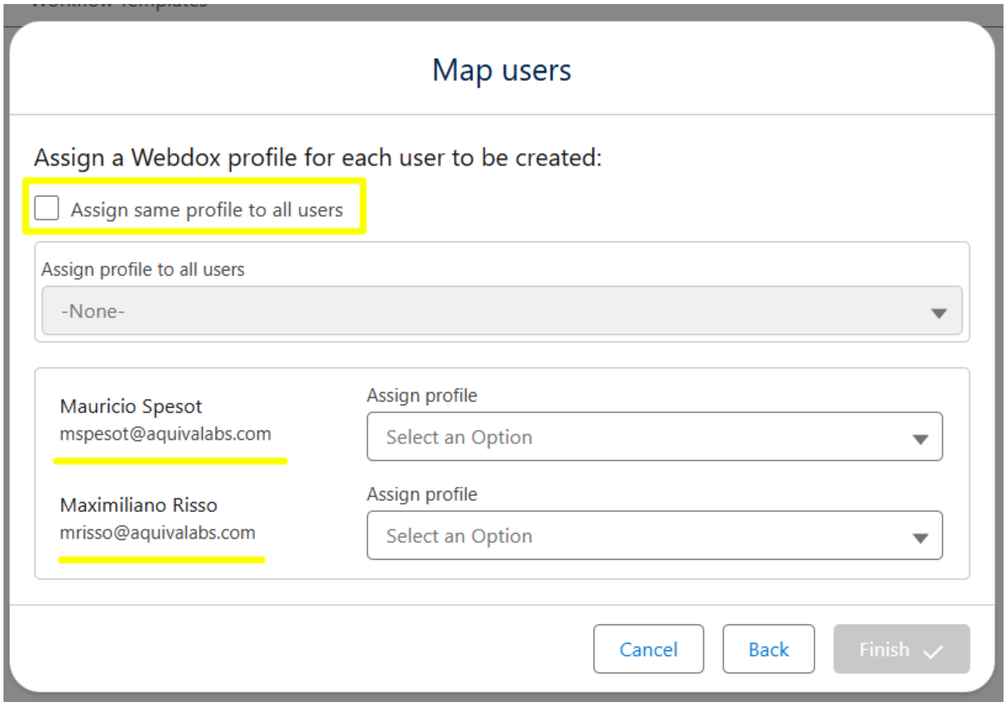
2. Select one or more active Salesforce users.

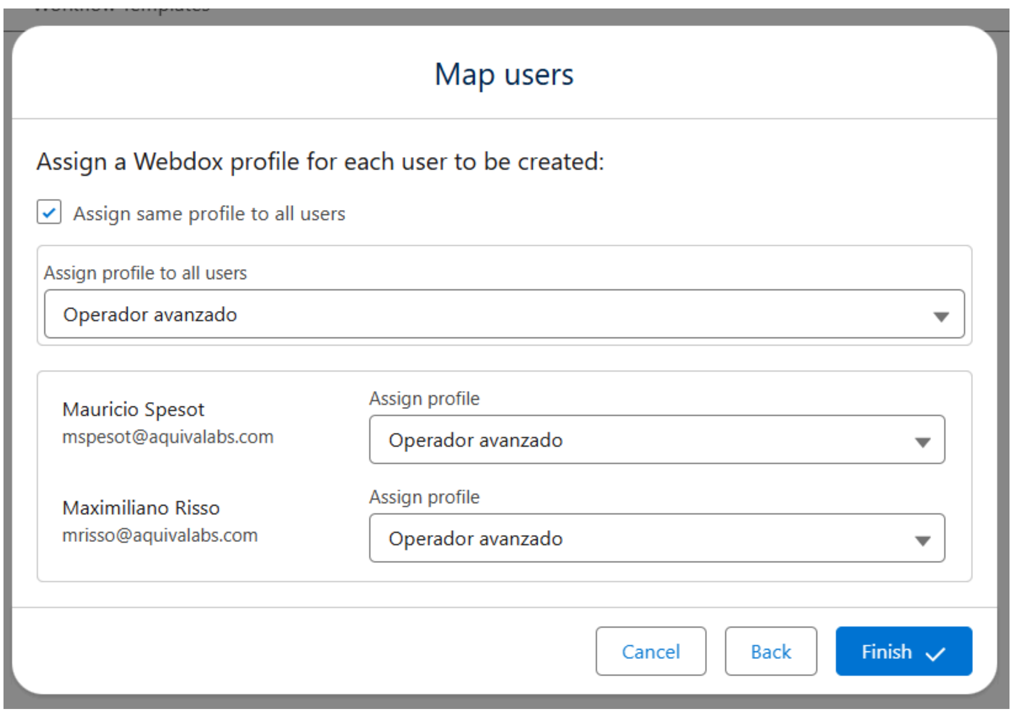


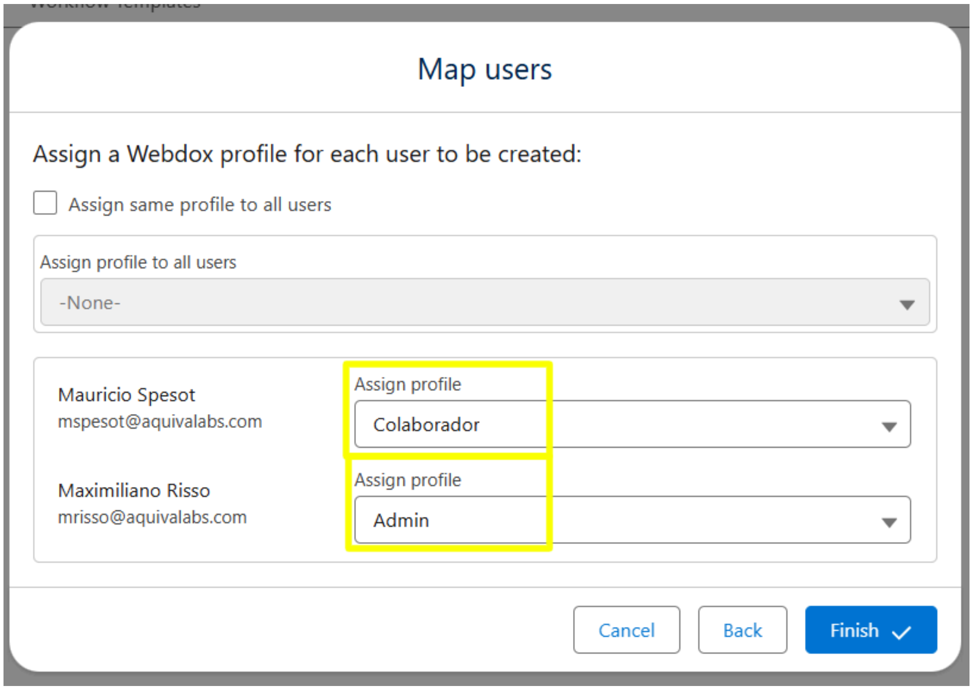


Note: To maintain performance, the interface prevents the selection of more than 50 users at a time for bulk mapping. A warning message is displayed at all stages: "You can map up to 50 users at a time".

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

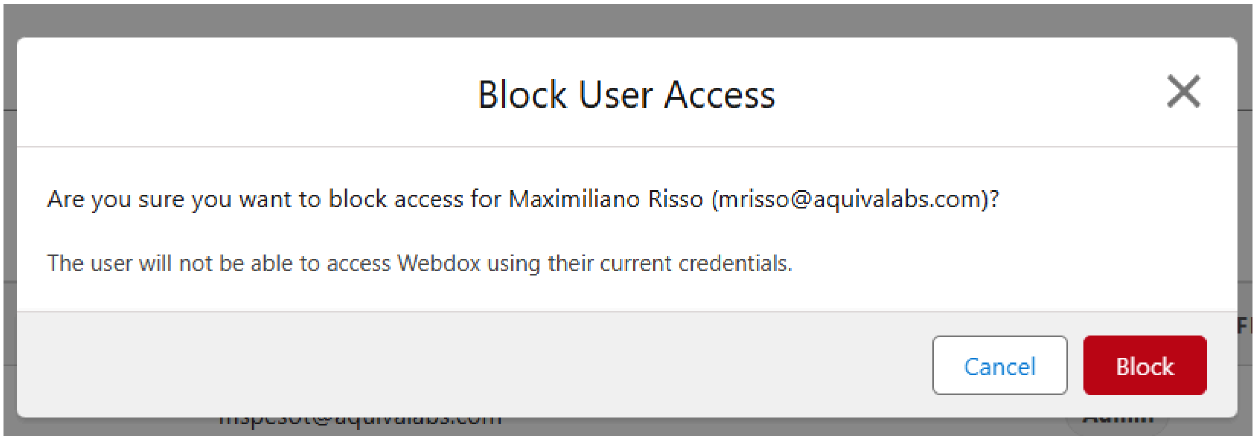


4. Click **Finish**.

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.



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

Step 4: Template and Field Mapping

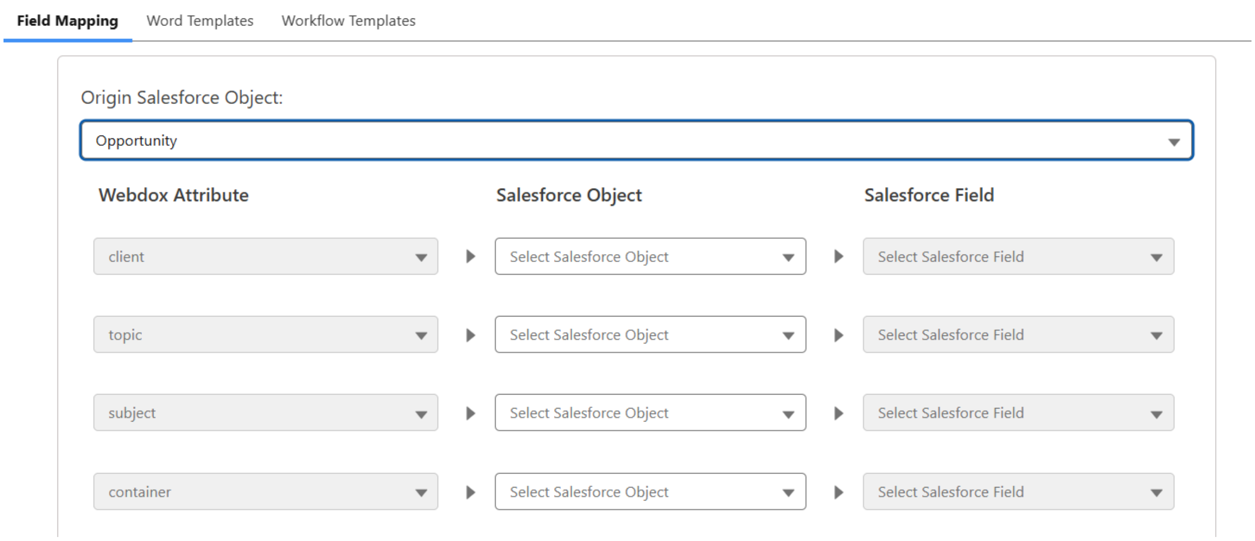
Templates and Field Mapping define how Salesforce data connects with Webdox workflows. Administrators can upload Word templates, enable workflow templates, and decide how fields from Salesforce objects map to Webdox attributes.

Field Mapping:

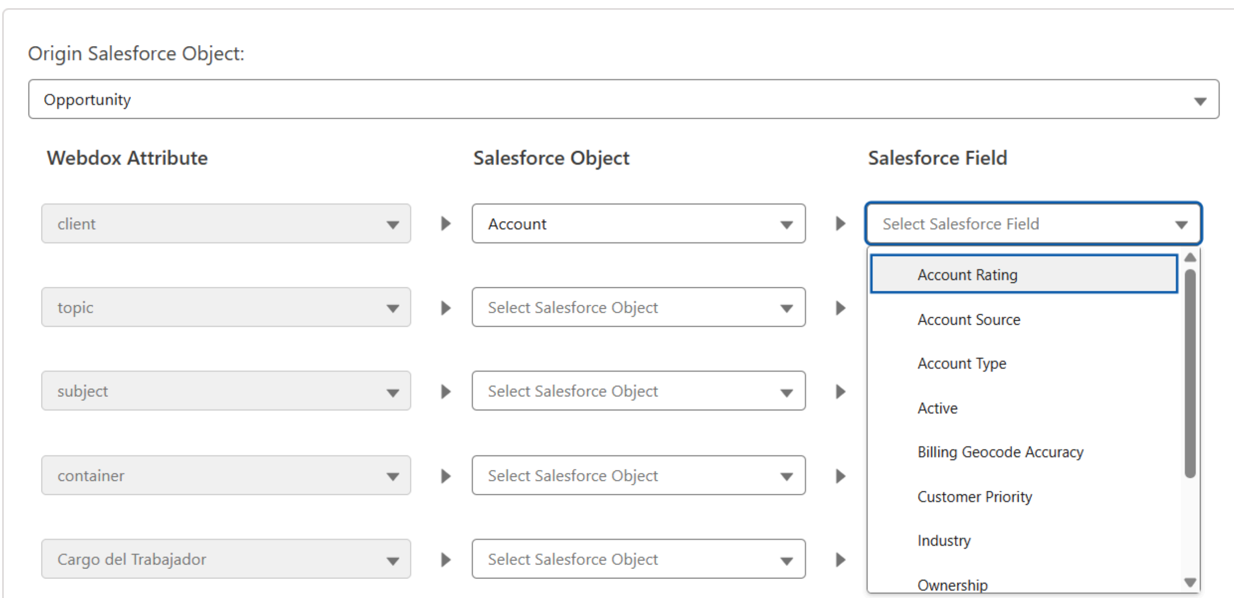
An administrator can map Webdox Attributes with Salesforce objects and fields. This is an object-level mapping (applies to all templates).

- 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".**



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

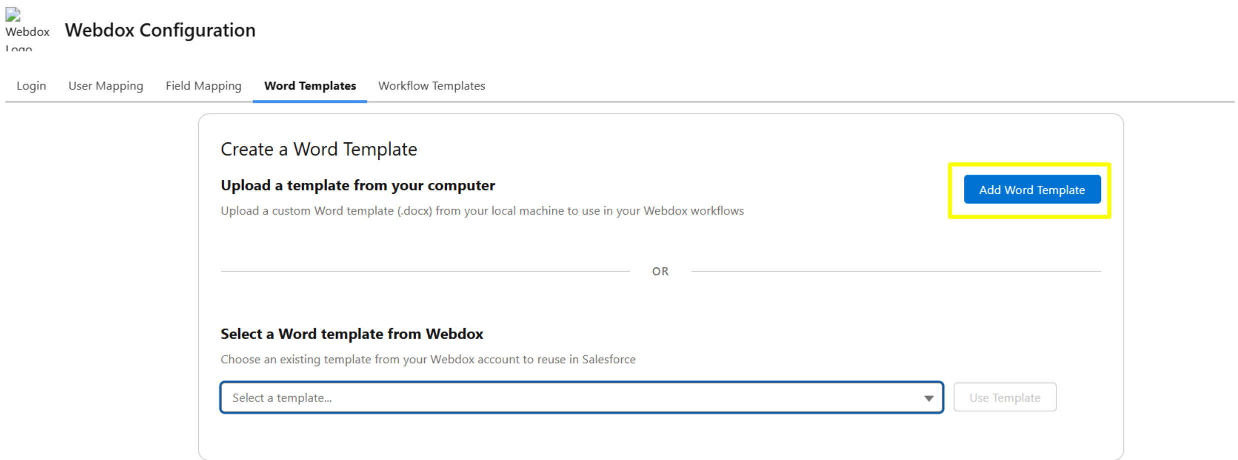


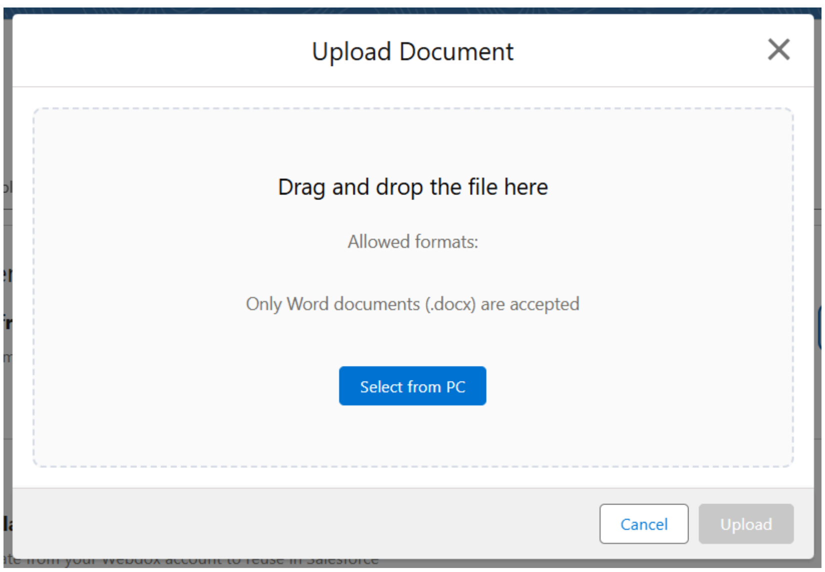
- Once the Field Mapping is finished, click **“Save Changes”**.
- Once a Field Mapping is saved, the administrator can select it again and add more mappings.

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"**.





- Or choose an existing template from Webdox.

- 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.

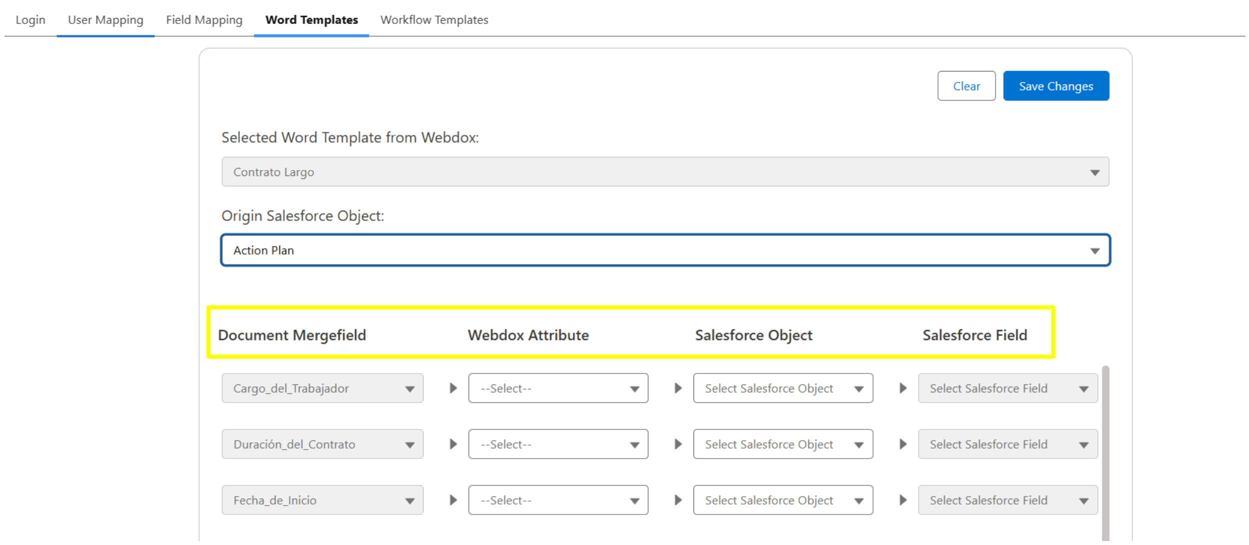
Note: If the system extracts no merge fields from the uploaded file, a user-friendly error is displayed, indicating that no merge fields were detected.

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:

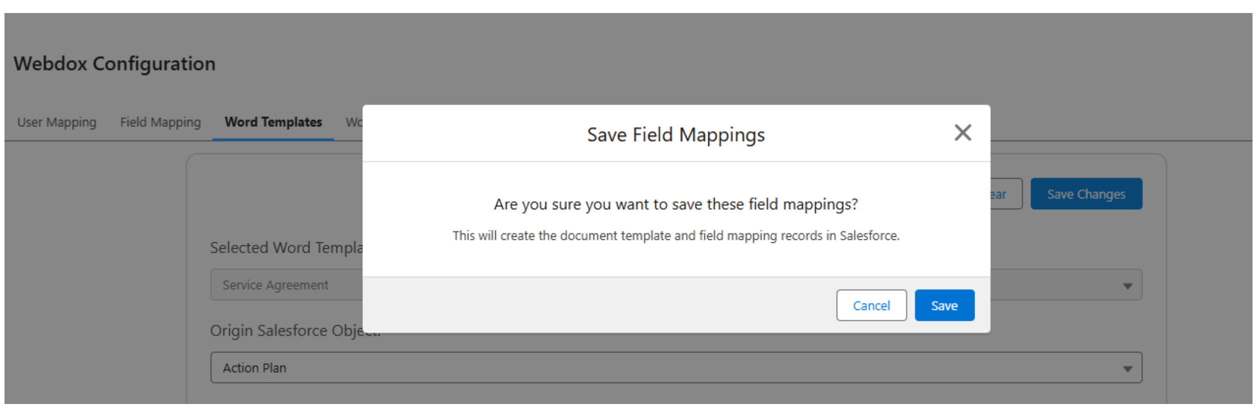
- A document merge field to a **Webdox Attribute** without selecting a Salesforce Object/Field.
- A document merge field to a **Salesforce Object/Field** without selecting a Webdox Attribute.
- To **both** a document attribute AND a Salesforce Object/Field.

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.



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.

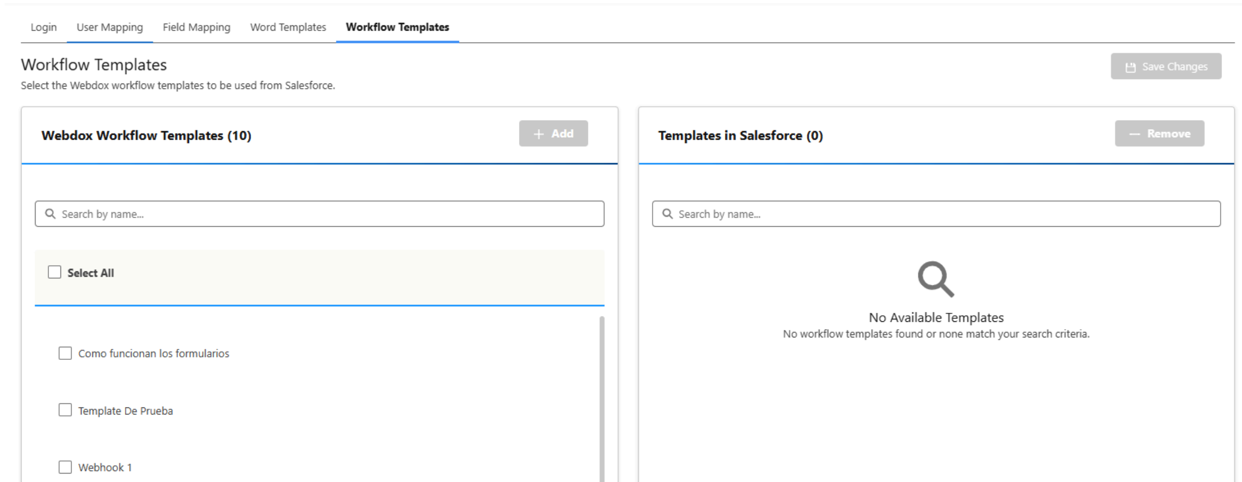


Workflow Templates:

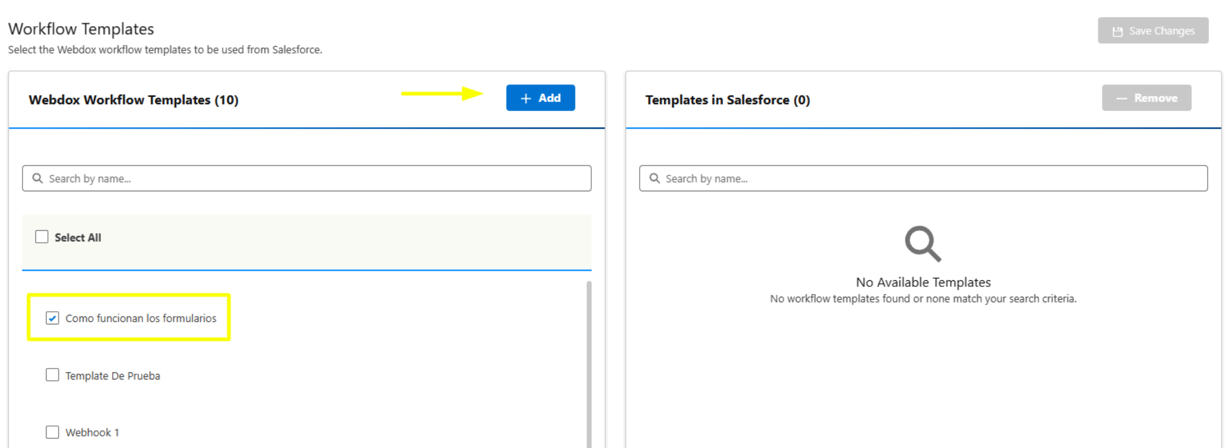
Workflow Templates are created in Webdox (not Salesforce), and once they are enabled, they become available for Salesforce users to select, although they cannot be edited from Salesforce.

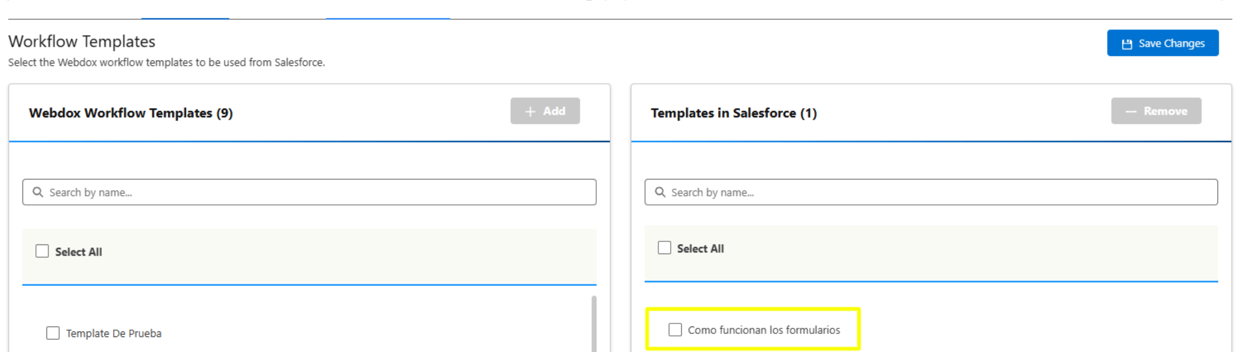
- Go to the **Workflow Templates** tab.
- Two columns are shown:
    - *Webdox Workflow Templates*

- *Templates in Salesforce*



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





- The item will be moved to the next column.

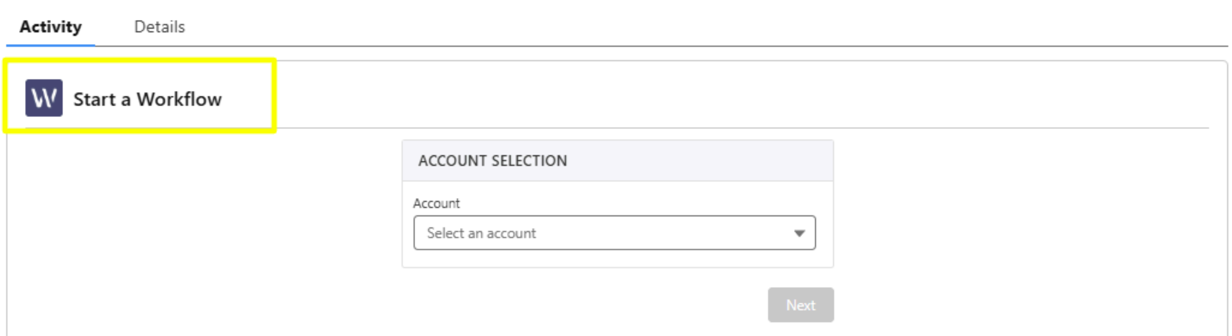
Note: If you want to remove the template, select the item and click on **"- Remove"**.

Step 5: Workflow Execution and Monitoring

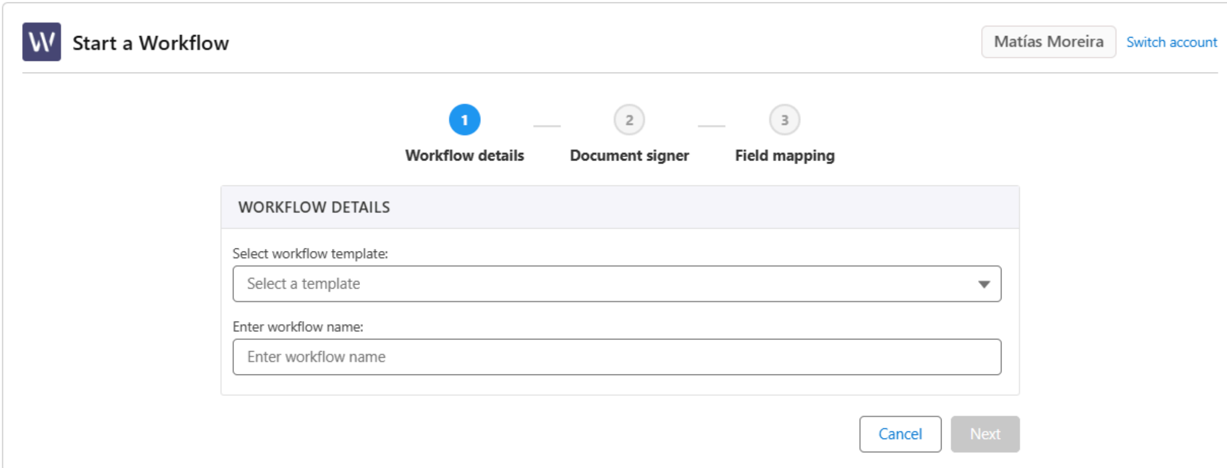
End-users (with the WebdoxCLM - User permission set) will typically execute workflows, but admins should understand the process.

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.

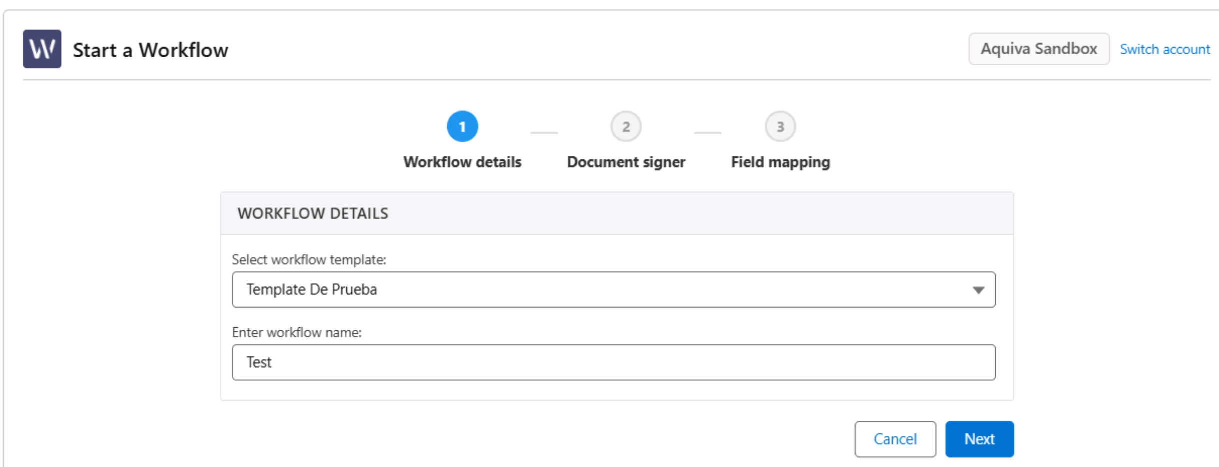


- Before starting, you will see the name of the account you are currently logged into displayed in the top-right corner of the interface. This helps you confirm you are working in the correct account.
- Next to the account name, a **Switch Account** button is available. Clicking it will open a pop-up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

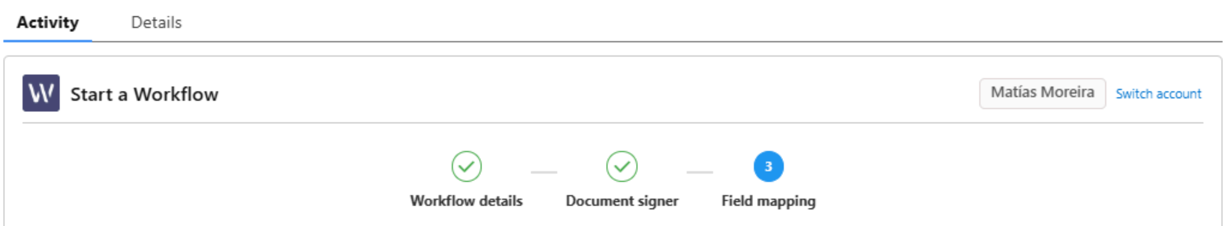


Select a Workflow Template and Name It

- 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.

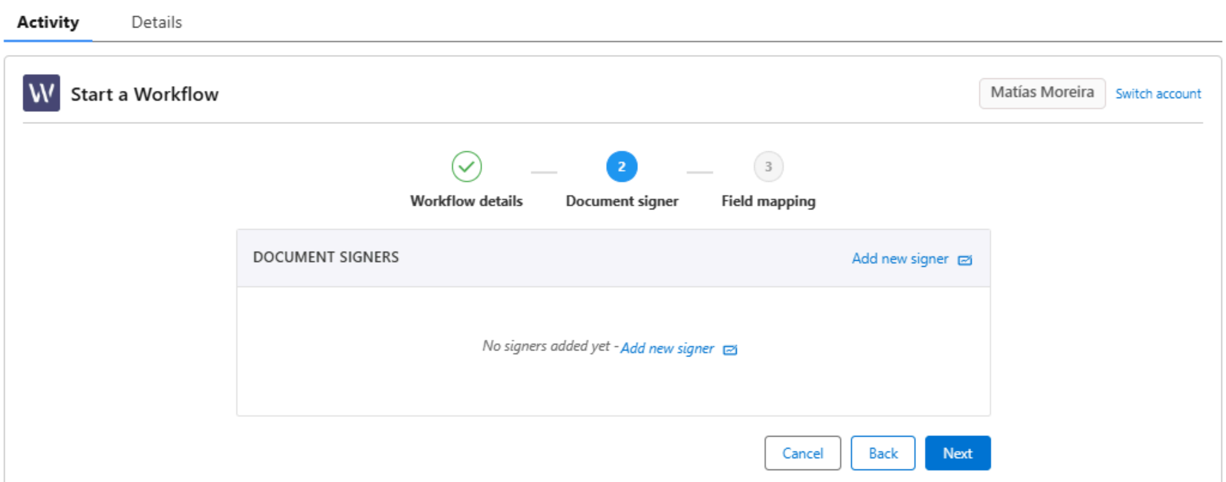


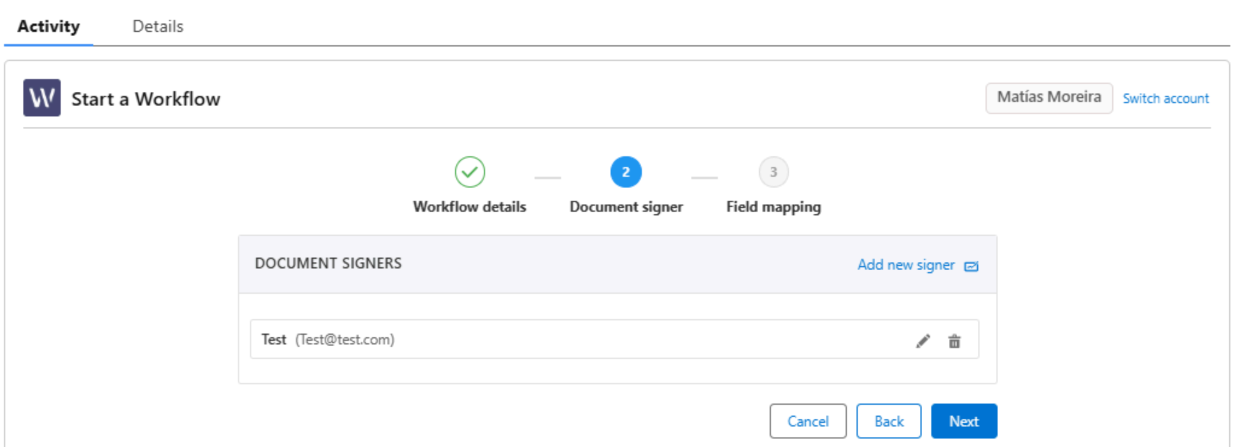
- While creating the workflow, a horizontal progress tracker at the top of the interface will show your progress. The two main steps are **"Cycle details"** and **"Document signer"**. The current step will be highlighted and numbered, while completed steps will show a visual confirmation like a checkmark.



Add and Manage Document Signers

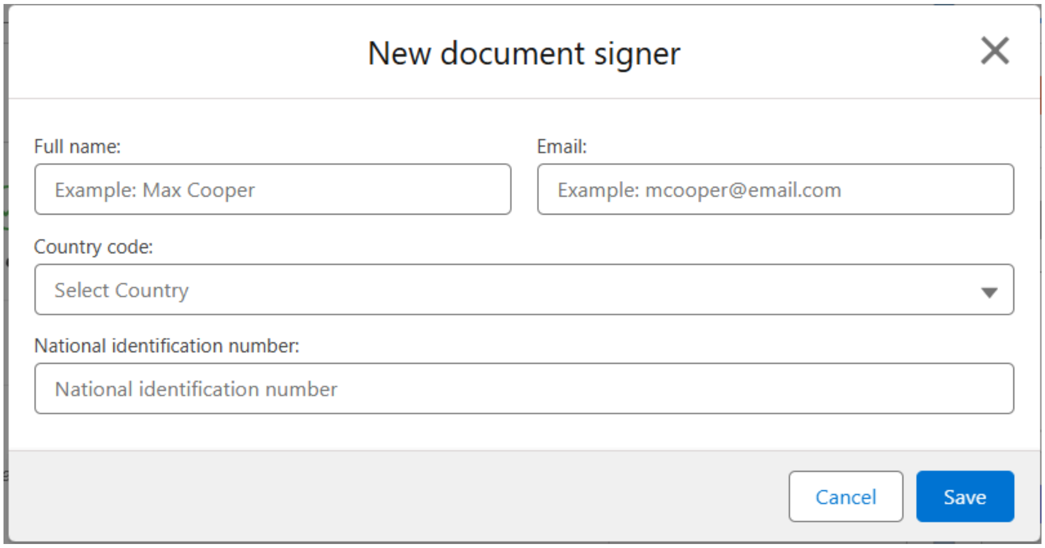
- You can add one or more signers by clicking the **Add new signer** button.



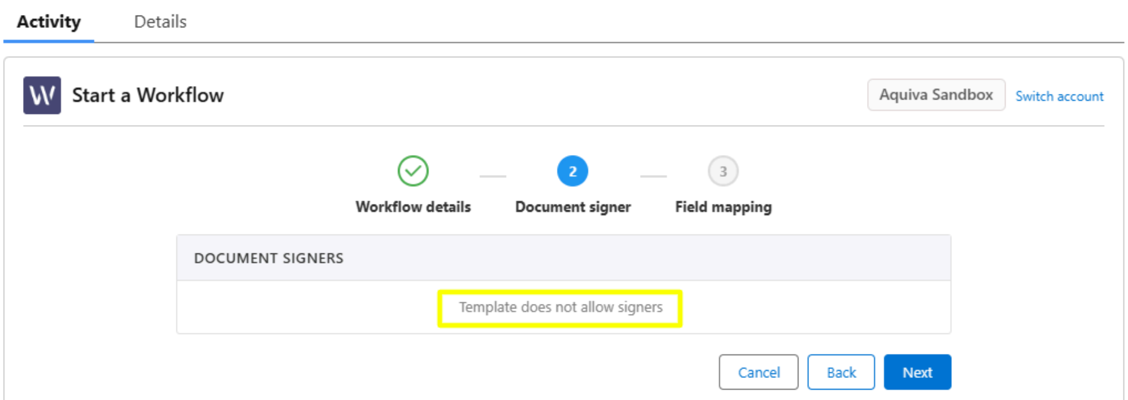


Each signer requires:

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

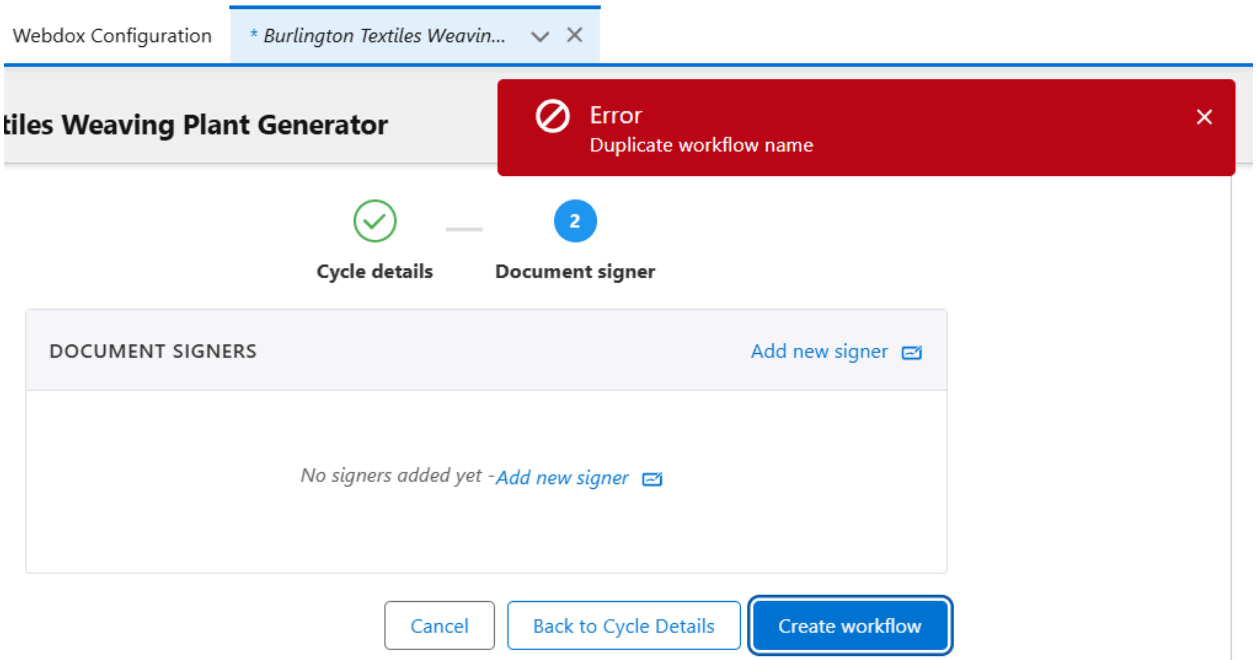


- The system validates all signer fields for format and completeness.
- You can review, edit, and remove signers before proceeding.
- If the workflow doesn't require signers, you can proceed without adding them.

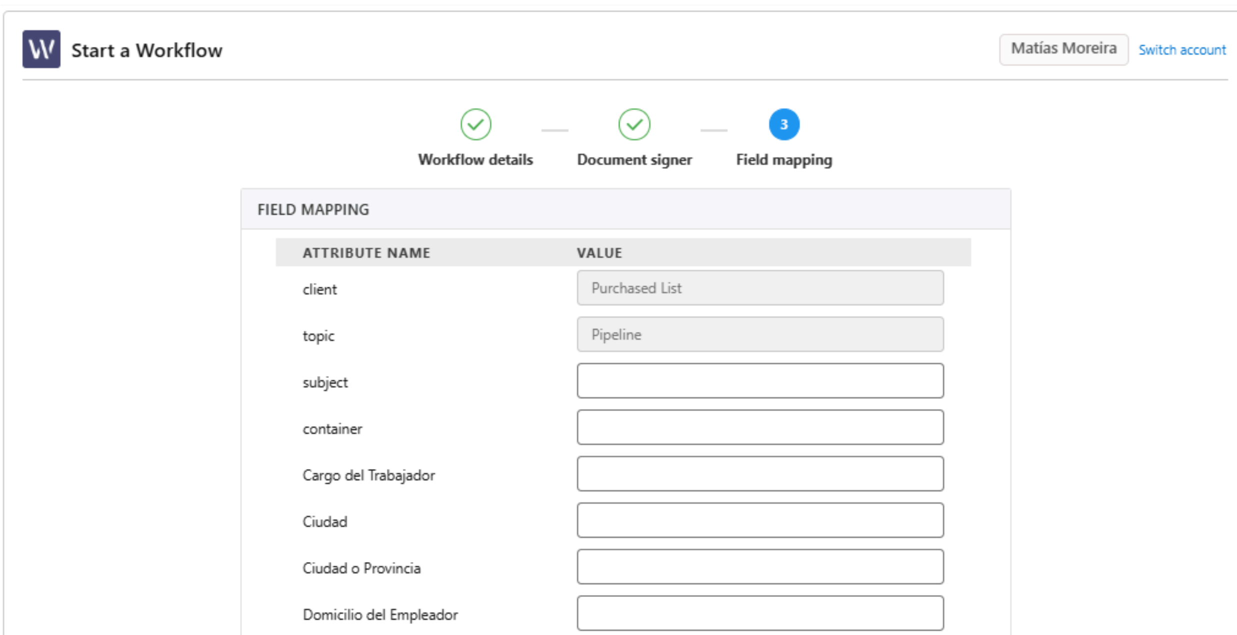


- If the chosen name is a duplicate, an error message will be displayed.

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



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



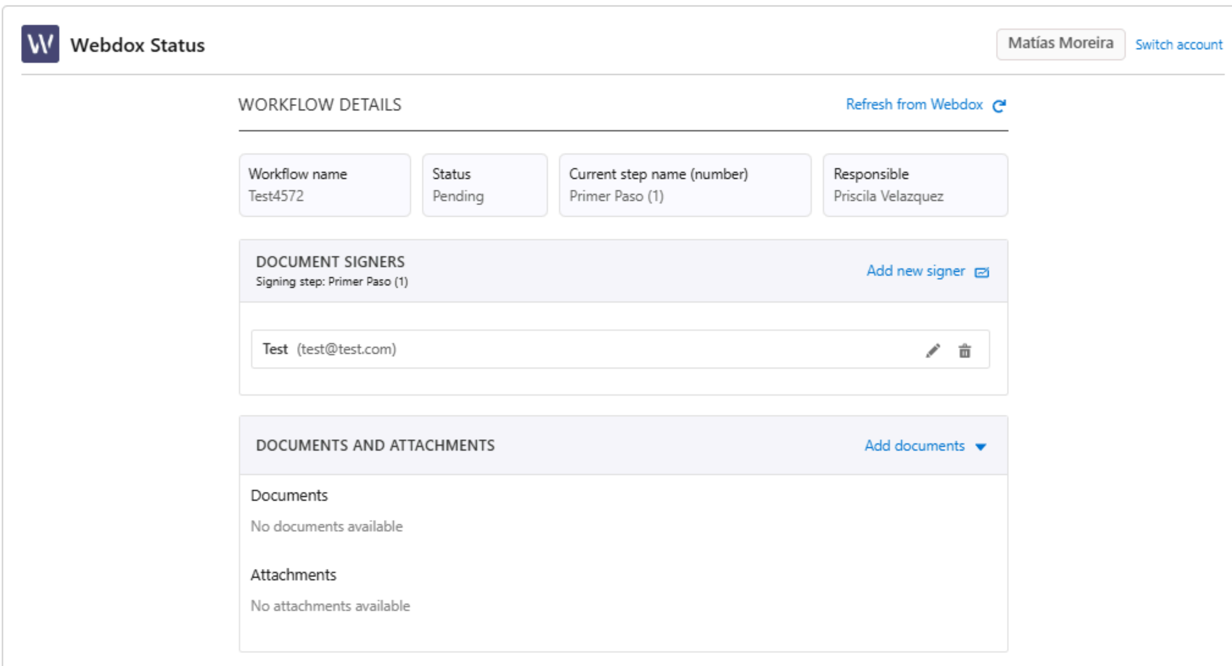
Tracking Workflow Progress

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:

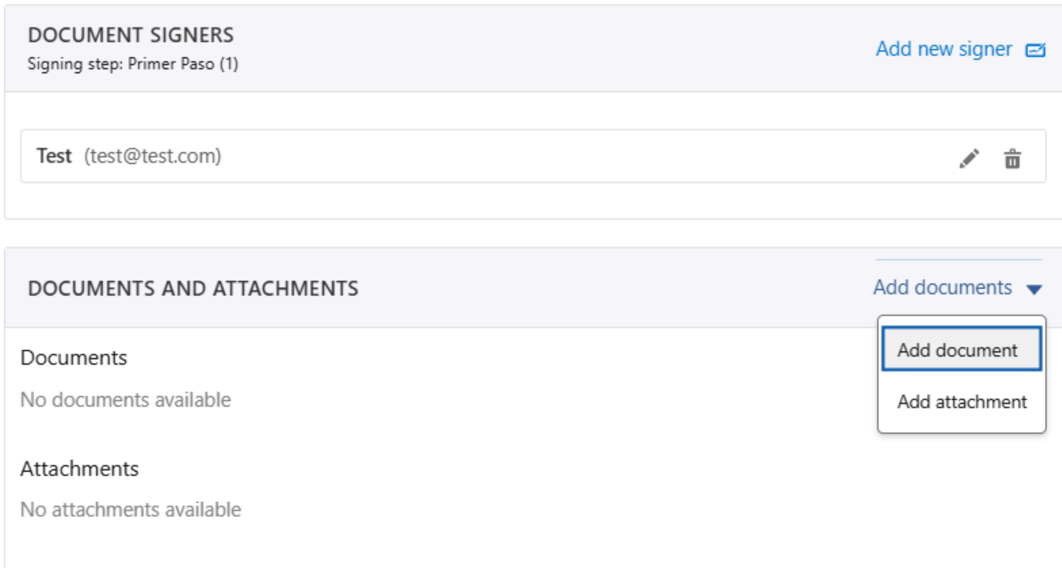
- **Workflow name:** The name you entered during creation.
- **Status:** The current status of the workflow, such as *"In progress*".
- **Current step name:** The descriptive name and number of the current step (e.g., "Electronic signature (#4)").
- **Responsible person:** The name of the user assigned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

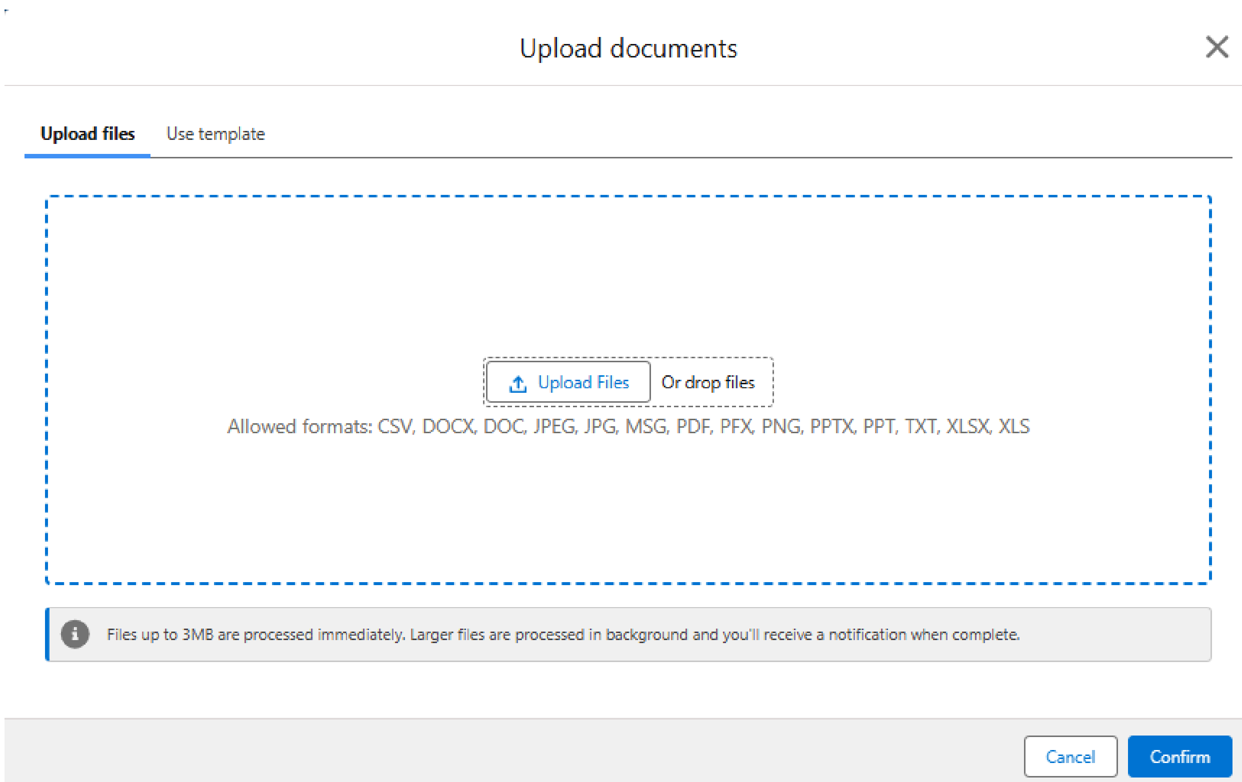
Note: If you are the assigned "Responsable" for the workflow and it requires signers, a warning message will appear: *"This workflow requires signers. Signers can be added in this screen or in Webdox".*



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.





- 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.