

**Admin Guide
for
Scribe Salesforce Package**

scribe.

V1.40 23.07.2026



1. Introduction
2. Package Installation
- 2.1 Mobile usage considerations
- 3. Scrive Authorization**
- 3.1 Scrive Authorization flow
- 3.2 Scrive Email Validation during Scrive Authorization process
- 3.3 Troubleshooting
- 4. Package configuration - Admin Panel**
- 4.1 Users
 - 4.1.1 Scrive Account Email on the Salesforce User
 - 4.1.2 Scrive Admin permission - management
 - 4.1.3 Scrive User permission - management
 - 4.1.4 Scrive Viewer permission - management
 - 4.1.5 Filter
 - 4.1.6 Disconnecting All Users
 - 4.1.7 Scrive Environment
 - 4.1.8 Troubleshooting
- 4.2 Callback Setup
 - 4.2.1 Troubleshooting
- 4.3 Scrive Settings
 - 4.3.1 List of Scrive Settings
 - 4.3.2 Rebuild Visual Force Pages Index
- 4.4 Branded subdomain
 - 4.4.1 Troubleshooting
- 4.5 Scrive Admin Panel - Reports
 - 4.5.1 Troubleshooting
5. Global Field Mappings
 - 5.1 Field Mapping Definition
 - 5.2 Adding new Field Mapping
 - 5.3 Editing existing Field Mapping
 - 5.4 Removing existing Field Mapping
 - 5.5 Troubleshooting
6. Translations
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

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

7.3 Troubleshooting

8. Scrive Document

8.1 Highlights panel

8.2 Related Record

8.3 Main File

8.3.1 Import Configuration and Save

8.4 Details tab

8.5 Parties tab

8.5.1 Party Source

8.5.2 Details, Delivery, Authentication

8.5.3 Request Attachments

8.5.4 Field Mappings

8.6 Attachments tab

8.6 Events tab

8.7 Main Document preview

9. Scrive Process Template

9.1 Highlights panel

9.2 Source Object

9.3 Main File

9.4 Details tab

9.4.1 Override Document Title

9.5 Parties tab

9.5.1 Party Source

9.5.2 Details, Delivery, Authentication

9.5.3 Request Attachments

9.5.4 Field Mappings

9.6 Attachments tab

9.7 Start Scrive Process Template From Record

9.7.1 Troubleshooting

9.8 Import Configuration From Scrive

9.9 Access Controller

9.9.1 Access Controller on a Document level

9.9.2 Access Controller on a Parties level

9.9.3 Access Controller on a Attachments level

9.9.4 Access Controller on a Field Mappings level

10. Scrive Browser

10.1 Load More Data

10.2 Filters

10.3 Actions

10.3.1 Import

10.4 Troubleshooting

11. Custom Development

11.1 Self build of Scrive Document records

11.1.1 Scrive Document record definition

11.1.2 Scrive Document Party record definition

11.1.3 Scrive Document Attachment record definition

11.1.4 Code Samples - Scrive Document definition

11.2 ScriveGlobal class

11.3 Mass Import

11.4 Invocable methods for ScriveGlobal

11.5 Visualforce PDF Template as source document

11.5.1 Indexing

Release notes

Release 0.3, 12.2021

Release 0.4, 03.2022

Release 0.5, 05.2022

Release 0.6, 06.2022

Release 0.7, 03.2022

Release 0.8, 03.2023

Release 0.9, 06.2023

Release 0.10, 08.2023

Release 0.11, 09.2023

Release 0.12, 10.2023

Release 0.13, 03.2024

Release 0.14, 06.2024

Release 0.15, 07.2024

Release 0.16, 09.2024

Release 1.18, 09.2024

Release 1.19, 10.2024

Release 1.20, 11.2024

Release 1.21, 12.2024

Release 1.24, 01.2025

Release 1.25, 03.2025

Release 1.26, 04.2025

Release 1.27, 05.2025

Release 1.28, 06.2025

Release 1.29, 06.2025

Release 1.31, 07.2025

Release 1.32, 07.2025

Release 1.34, 09.2025

Release 1.35, 10.2025

Release 1.36, 11.2025

Release 1.37, 01.2026

Release 1.38, 04.2026

Release 1.39, 05.2026

Release 1.40, 07.2026

1. Introduction

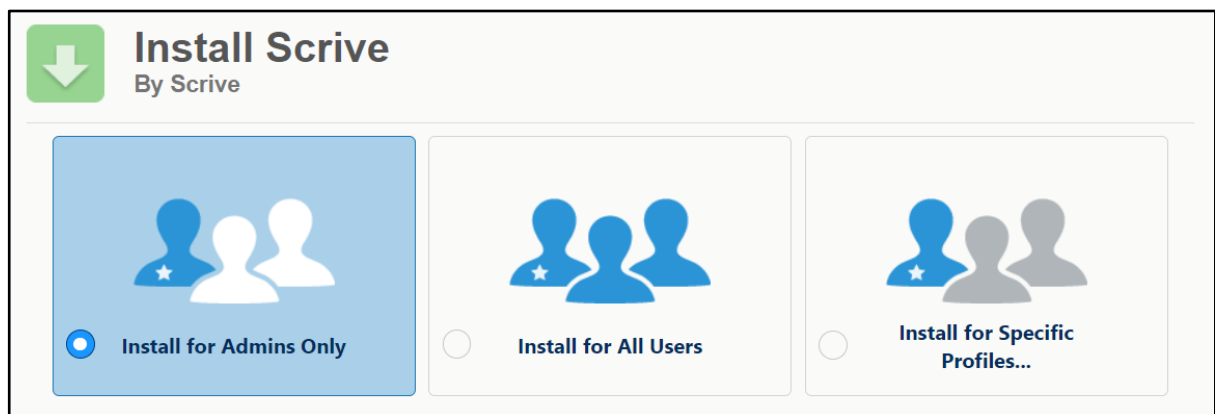
This document presents the detailed configuration of the Scrive Application in Salesforce - the application used for Salesforce integration with Scrive e-sign service.

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 “Scribe Admin Panel” (details: [Users](#)).

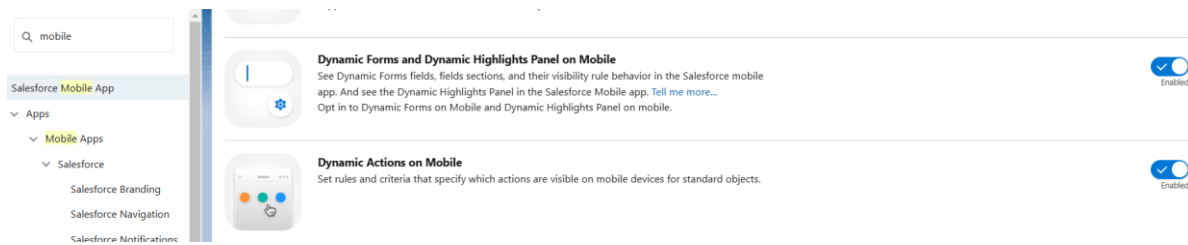


Actions on the install: the installer (user) will get the “Scribe Admin” permission set required for Scrive Company Account Configuration, Users Management and Global Field Mappings management. Additionally, an initial set of default Global Field Mappings will be created.

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.

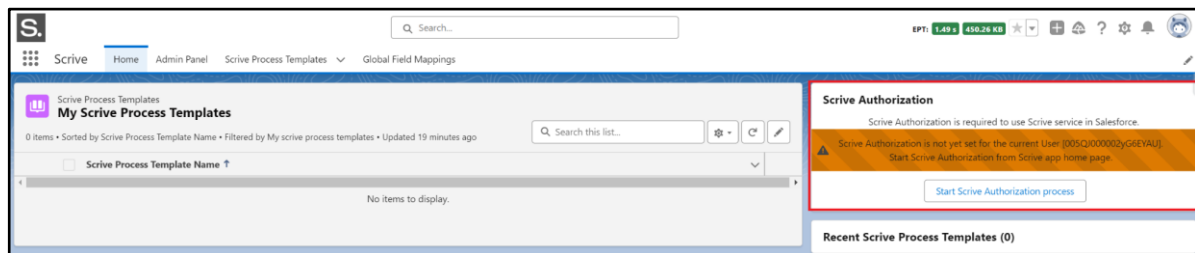
2.1 Mobile usage considerations

To make sure that flexipages provided by this package work properly, please go to Salesforce Setup, search for Salesforce Mobile App and in section listing features, please enable *Dynamic Actions on Mobile* (needed for record actions on Document level to render conditionally) and *Dynamic Forms and Dynamic Highlights Panel on Mobile* (needed for flexipage to render document details conditionally)



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.

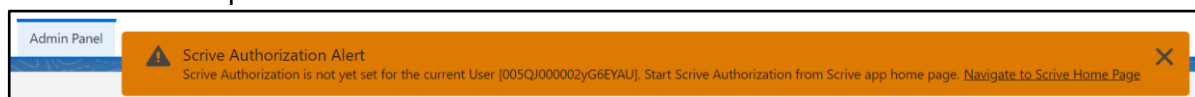


Note: *Scrive Admin* (even if *Scrive User* permission is not assigned to this Salesforce user) has to go through the Scrive Authorization process before any action on:

- [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.

Scrive Authorization

Scrive Authorization is required to use Scrive service in Salesforce.



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

Start Scrive Authorization process

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

scrive.

Email

Password

[Forgot?](#) [Reset password](#)

LOG IN

LOG IN WITH SSO

Don't have an account? [Sign up for free](#)

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

scrive.

Start new process

Start from template

E-archive

Account

Log out

Salesforce-integration-test-cloudity.pl

Application is asking for consent for the following 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
- Full access to your account

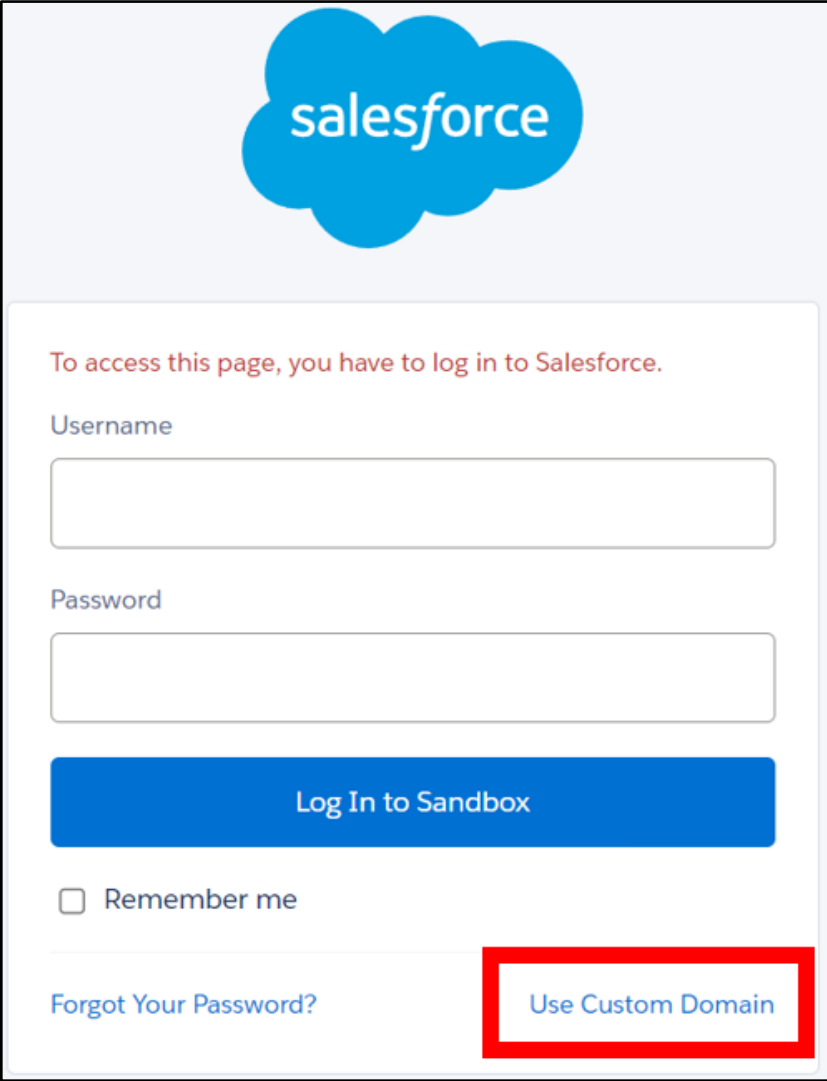
☐ Remember me (for 30 days)

Accept

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.

A screenshot of the Salesforce login page. At the top is the Salesforce logo, a blue cloud with the word "salesforce" in white. Below the logo, a message in red text says "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 left is a link "Forgot Your Password?". At the bottom right is a link "Use Custom Domain" which is highlighted with a red rectangular border.

salesforce

To access this page, you have to log in to Salesforce.

Username

Password

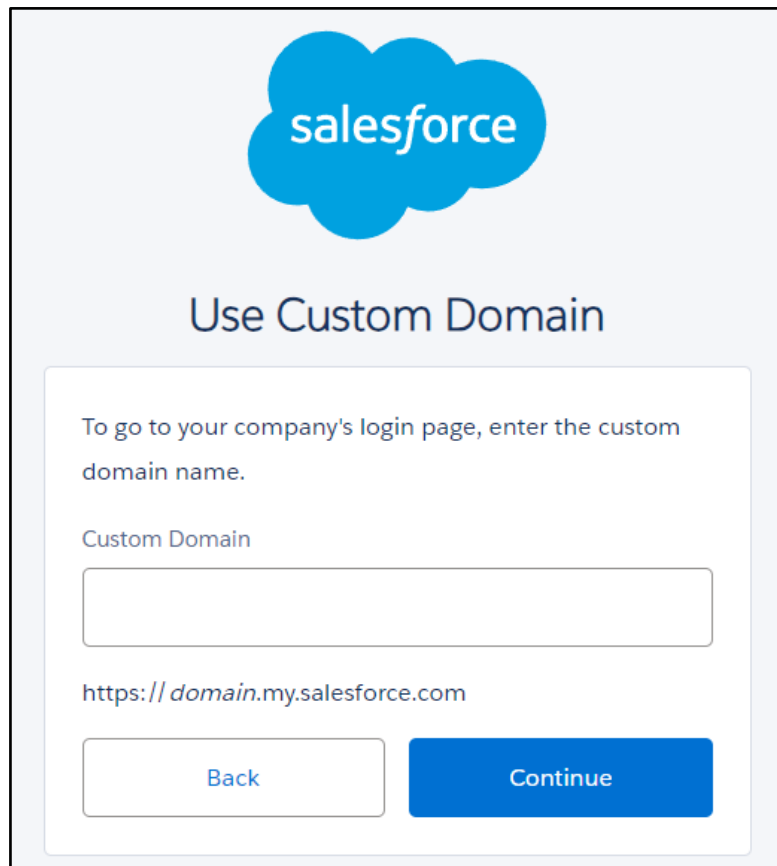
Log In to Sandbox

☐ Remember me

[Forgot Your Password?](#)

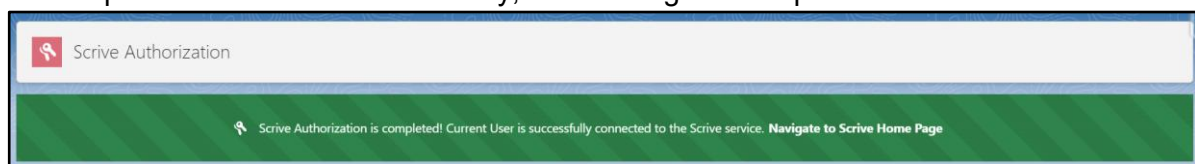
[Use Custom Domain](#)

- 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.

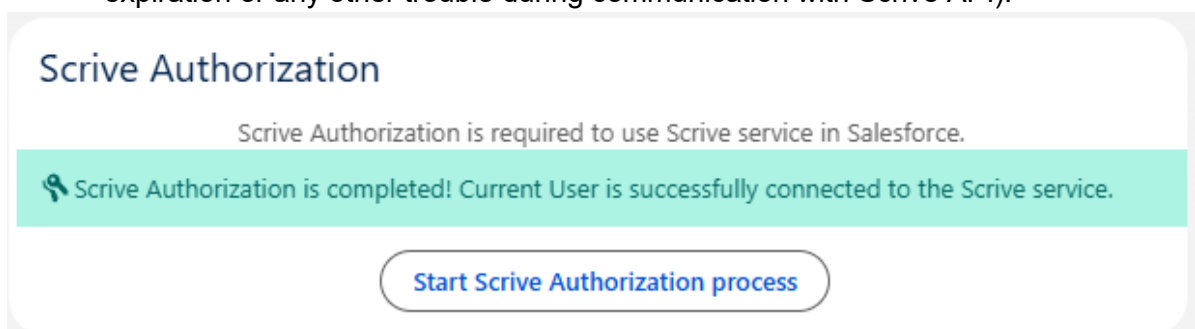


The image shows the Salesforce 'Use Custom Domain' login page. At the top is the Salesforce logo. Below it is the heading 'Use Custom Domain'. The main content area contains a text prompt: 'To go to your company's login page, enter the custom domain name.' Below this is a label 'Custom Domain' followed by a text input field. Under the input field is a placeholder URL: 'https:// domain.my.salesforce.com'. At the bottom are two buttons: 'Back' and 'Continue'.

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).



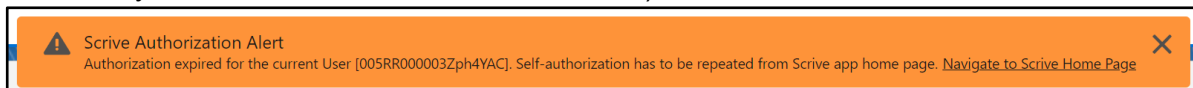
3.2 Scrive Email Validation during Scrive Authorization process

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](#).

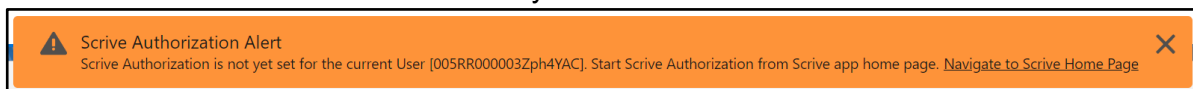
Note: Scrive Email of the Salesforce user can be checked in [Users](#) panel or directly on User record - it's a value from Scrive Email (ScribeSf__ScribeEmail__c) field if it's not blank or the value of standard Salesforce Email field.

3.3 Troubleshooting

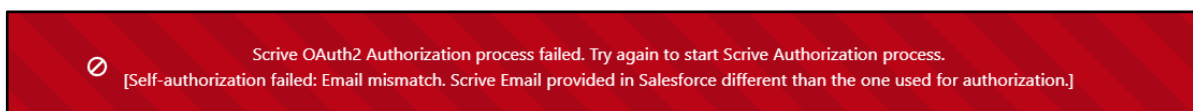
- Any problem with Scrive API communication:
 - ◆ Repeat [Scrive Authorization flow](#) from Scrive app Home page.
- *Error:* Scrive Authorization expired for the current User (refresh token is valid for 30 days since last Scrive API communication)



- ◆ Repeat [Scrive Authorization flow](#) from Scrive app Home page.
- *Error:* Scrive Authorization is not yet set for the current User

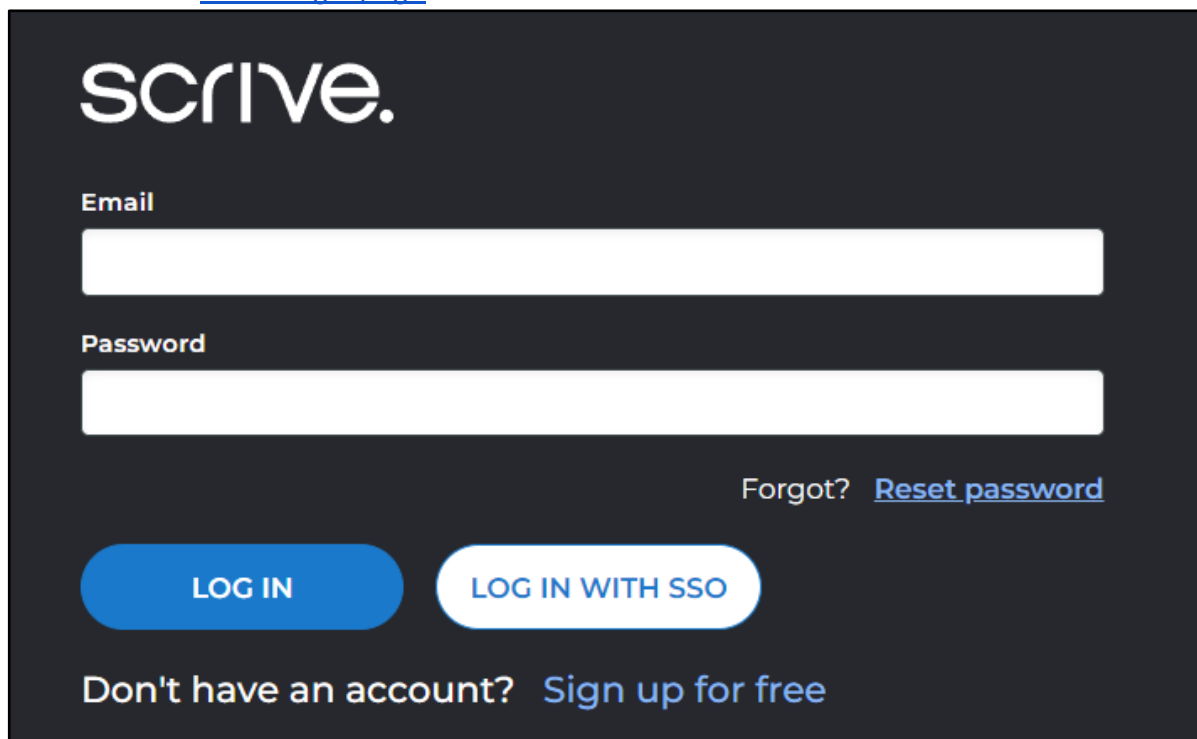


- ◆ Execute/repeat [Scrive Authorization flow](#) from Scrive app Home page.
- *Error:* Email mismatch, Scrive Email provided in Salesforce different than the one used for authorization



- ◆ 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.

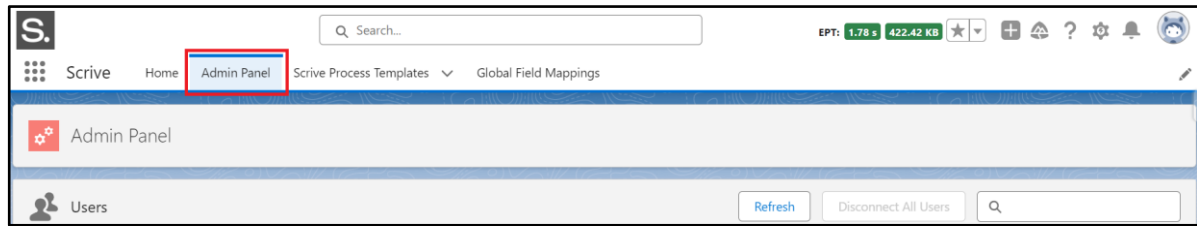
The image shows the Scrive login interface. At the top left is the 'scrive.' logo in white on a dark background. Below the logo are two input fields: 'Email' and 'Password', both with white text on a dark background. To the right of the password field is a link that says 'Forgot? Reset password'. Below the input fields are two buttons: a blue button with white text 'LOG IN' and a white button with blue text 'LOG IN WITH SSO'. At the bottom, there is a link that says 'Don't have an account? Sign up for free'.

4. Package configuration - Admin Panel

Admin Panel in Scrive Application contains 2 main sections:

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

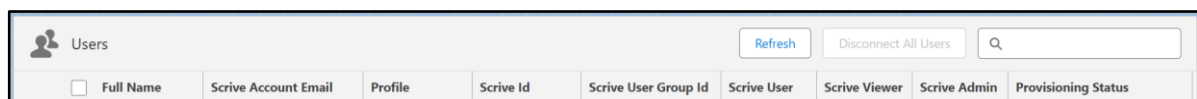
Scrive Administrator may find useful graphs in the Admin Panel, which are described in the section [Scrive Admin Panel - Reports](#)



4.1 Users

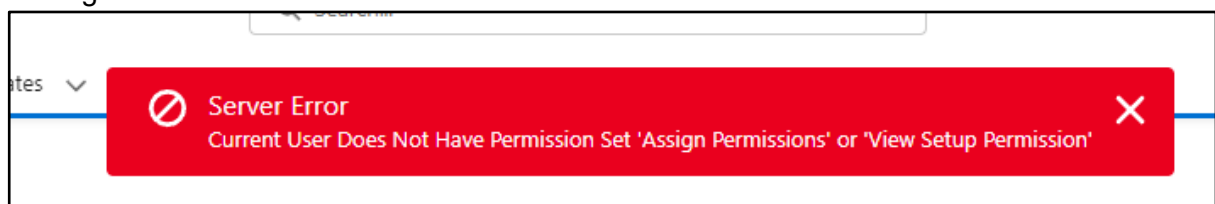
Users component is used for User Management. It contains the list of users that may use Scrive Application with Scrive User, Scrive Admin and Scrive Viewer editable columns. Using this component Scrive Admin is able to:

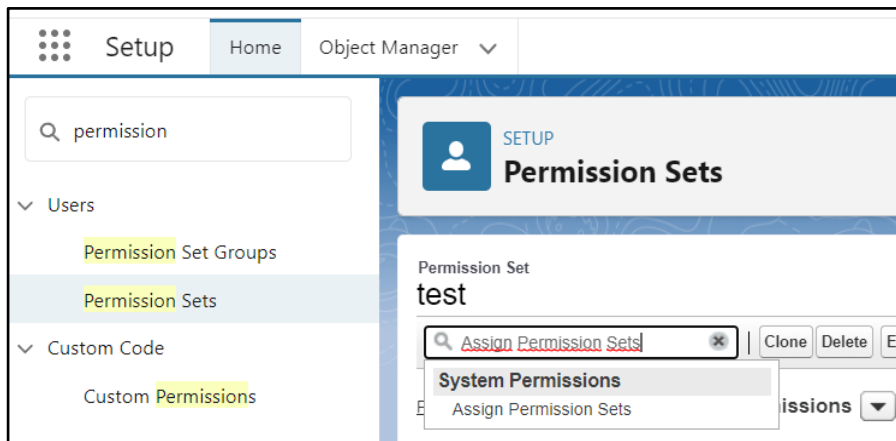
- Assign/remove *Scrive Admin* permissions for specific users,
- Assign/remove *Scrive User* permissions for specific users,
- Assign/remove *Scrive Viewer* permissions for specific users,
- Filter users,
- Check the provisioning status for the user (if a Scrive account is created under registered Company and review the potential error message),
- Disconnect All Users.
- Change Scrive Environment



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

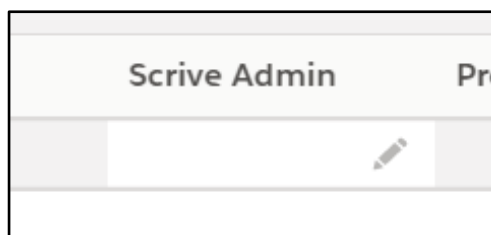
Users component has a '*Scrive Account Email*' column with an email address used for User Provisioning process (creating new Scrive Account or pulling details of existing Scrive Account). The value in '*Scrive Account Email*' column is based on the Scrive Email (ScriveSf__ScriveEmail__c) field value 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

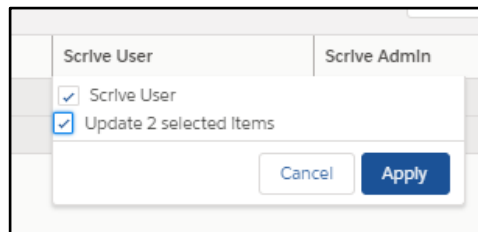
'Scrive Admin' columns might be edited at the same time (see the screenshot from [Scrive User permission - management](#) paragraph).

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

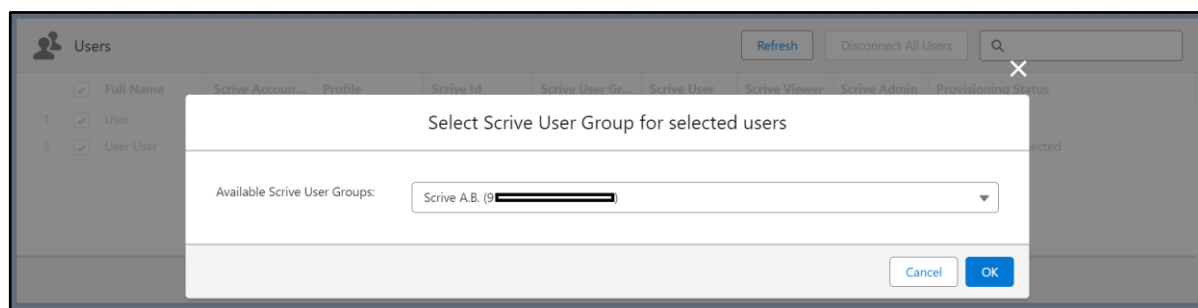
Scrive Admin can assign the *Scrive User* permission (or remove the assignment) to other users from the organisation. To do that, Scrive Admin should click on the pencil icon in the 'Scrive User' column in the specific user row to activate the inline editing, set the checkbox to proper value (checked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

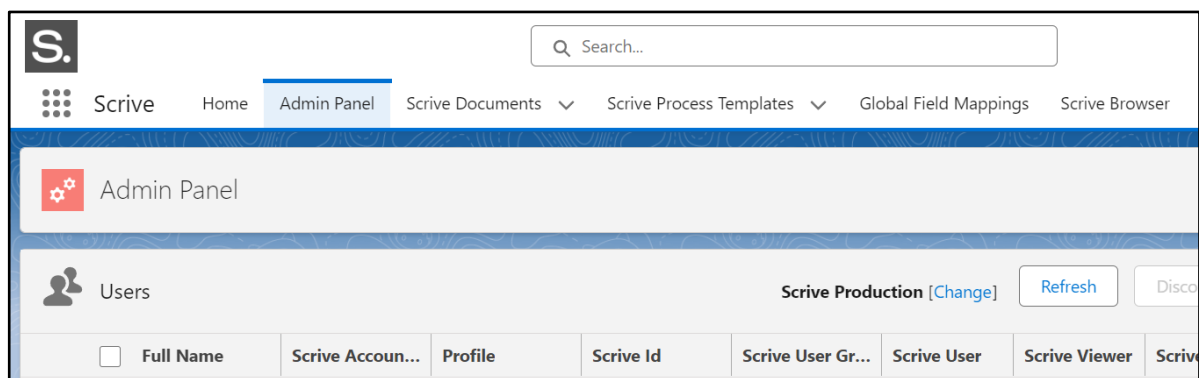
Filter is placed at the right top of the Users component. To use the filter, type the searched phrase. Then users are filtered by 'Full name', 'Username' and 'Profile' columns.

4.1.6 Disconnecting All Users

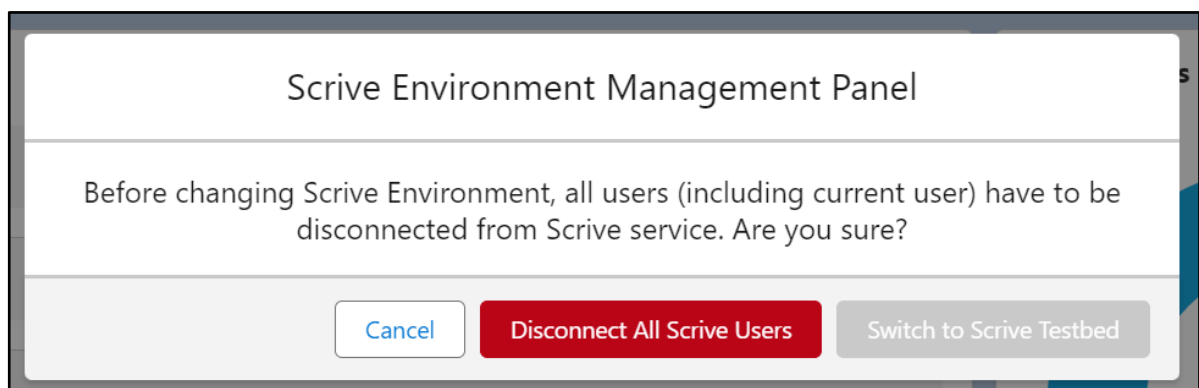
Scrive Admin may disconnect all salesforce users from Scrive service with the 'Disconnect All Users' button. After this action all Scrive Users will lose the ability to create and send Scrive Documents and lose the access to the 'Scrive Documents' and 'Scrive Process Templates' tabs. Scrive Authorization 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 Scrive Environment

By default, Scrive is connected to the Scrive Production environment, but it is possible to connect SF to Scrive Test Bed environment. It can be done from the Scrive Admin Panel from Users Management panel. Current target environment is visible on the top of the Users Management panel and can be modified with the "Change" button.



In the next step, all Scrive Users have to be disconnected (if any are already connected to the current Scrive Environment) and when all users are disconnected from Scrive service, the Scrive Environment switch has to be confirmed.



4.1.8 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.

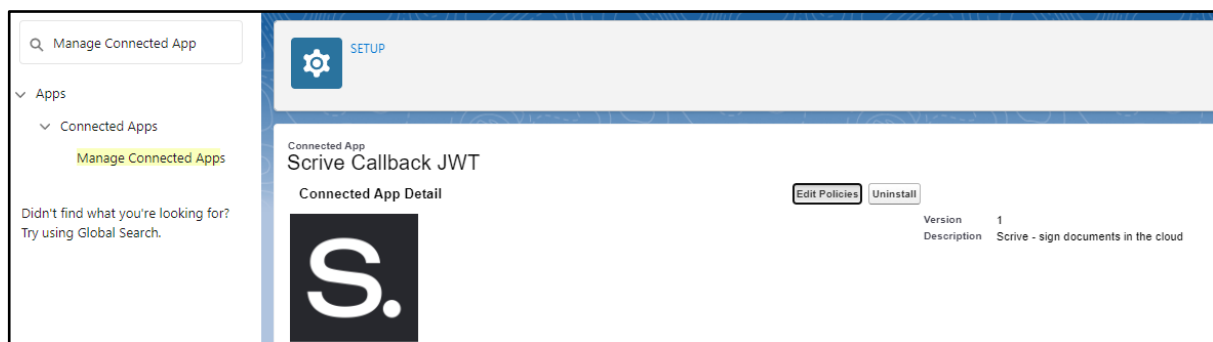
4.2 Callback Setup

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.
- API Enabled system permission required for each user who will use the callback.

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 "Scribe 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 All users may self-authorize
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

Rebuild Visual Force Pages index

> General

Document

Days To Sign Default Value ⓘ

14

> Attachments

4.3.1 List of Scrive Settings

Section Name	Scrive Settings Name	Description	Default value
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

4.3.2 Rebuild Visual Force Pages Index

Using the button in the right top part of Scrive Settings, admin can rebuild Visual Force Pages index. This index is used when a user tries to create a process template or document using Visual Force Pages.

In most cases there is no need to use this functionality as index is built during package installation. The only cases where index rebuilding might be needed are:

- Visual Force page was added, deleted or changed name
- Visual Force had changed "renderAs" parameter to or from "pdf"

Please be aware that index rebuilding is an async process and its exact progress can only be checked in Setup.

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

↓
User

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/>).

SETUP
Named Credentials

Save Cancel

Label Company Brand

Name CompanyBrand

URL https://companyBrand.scrive.com/api/v2/

Authentication

Certificate

Identity Type Anonymous

Authentication Protocol No Authentication

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 [Rebuild Visual Force Pages index](#)

General

Admin Email

Branded Subdomain Api Name Company Brand

> Document

> Attachments

Cancel Save

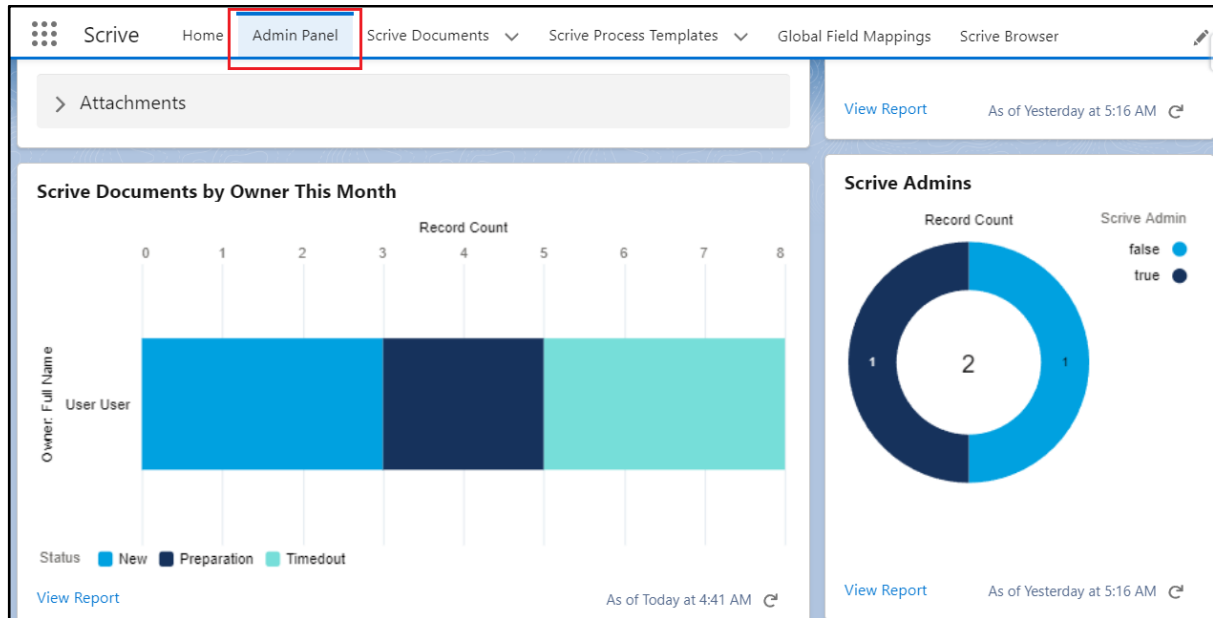
4.4.1 Troubleshooting

- 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

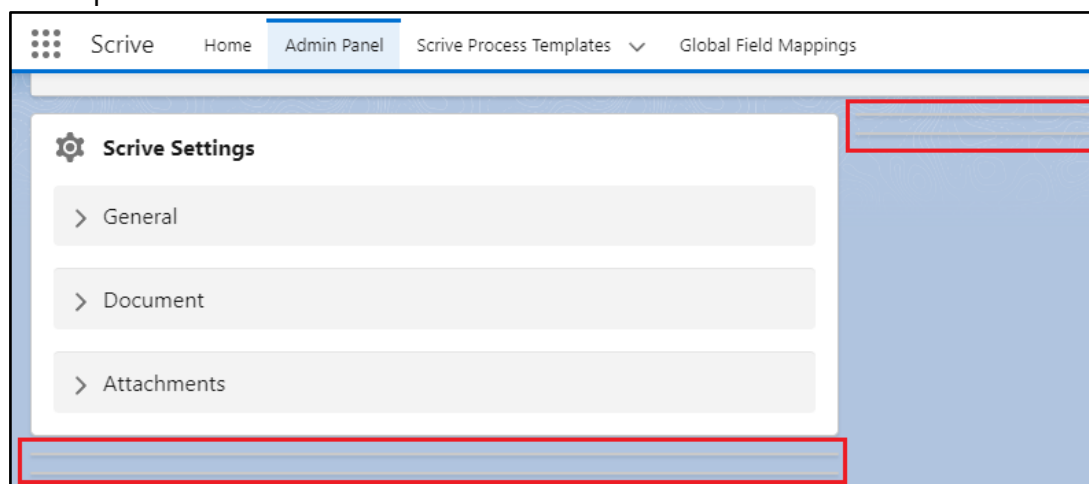
In the Admin Panel there are 4 report charts which can be found useful for Scrive Admins:

- 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	☐ Query Real-Time Event Monitoring Data using the API.
View Reports in Public Folders	☒ View and access reports in public folders, which does not include others' personal folders.
View Restriction and Scoping Rules	☐ View Restriction and Scoping Rules.
View Roles and Role Hierarchy	☐ 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 (Scribe 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).

 Search...			
 Scrive Home Admin Panel Scrive Documents Scrive Process Templates Global Field Mappings Scribe Browser			
 Global Field Mappings			
Field Mappings			
Mapping Level	Salesforce Object	Salesforce Field	Scribe 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.

Global Field Mappings						
Field Mappings						
Mapping Level	Salesforce Object	Salesforce Field	Scrive Field		Salesforce To Scrive	Scrive To Salesforce
1 Party	Contact	FirstName	name 1	17 ✓	✓	
2 Party	Contact	LastName	name 2	17 ✓	✓	
3 Party	Contact	Email	email	17 ✓	✓	
4 Party	Contact	MobilePhone	mobile	17 ✓	✓	
5 Party	Contact	ScriveSF_PersonalNumber_c	personal_number	17 ✓	✓	
6 Party	User	FirstName	name 1	17 ✓	✓	
7 Party	User	LastName	name 2	17 ✓	✓	
8 Party	User	Email	email	17 ✓	✓	
9 Party	User	MobilePhone	mobile	17 ✓	✓	
10 Party	User	ScriveSF_PersonalNumber_c	personal_number	17 ✓	✓	
11 Document	Opportunity	Name	testTextField	17 ✓	✓	

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 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 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 'Scribe User' permission to access the list of Scrive Templates with Scrive Fields pulled from scrive.com portal (please, review [Scribe 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 'Scribe Field' picklist is dependent on the 'Scribe Template' field (if no value is selected in the 'Scribe Template' field, the 'Scribe Field' picklist will be empty).

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

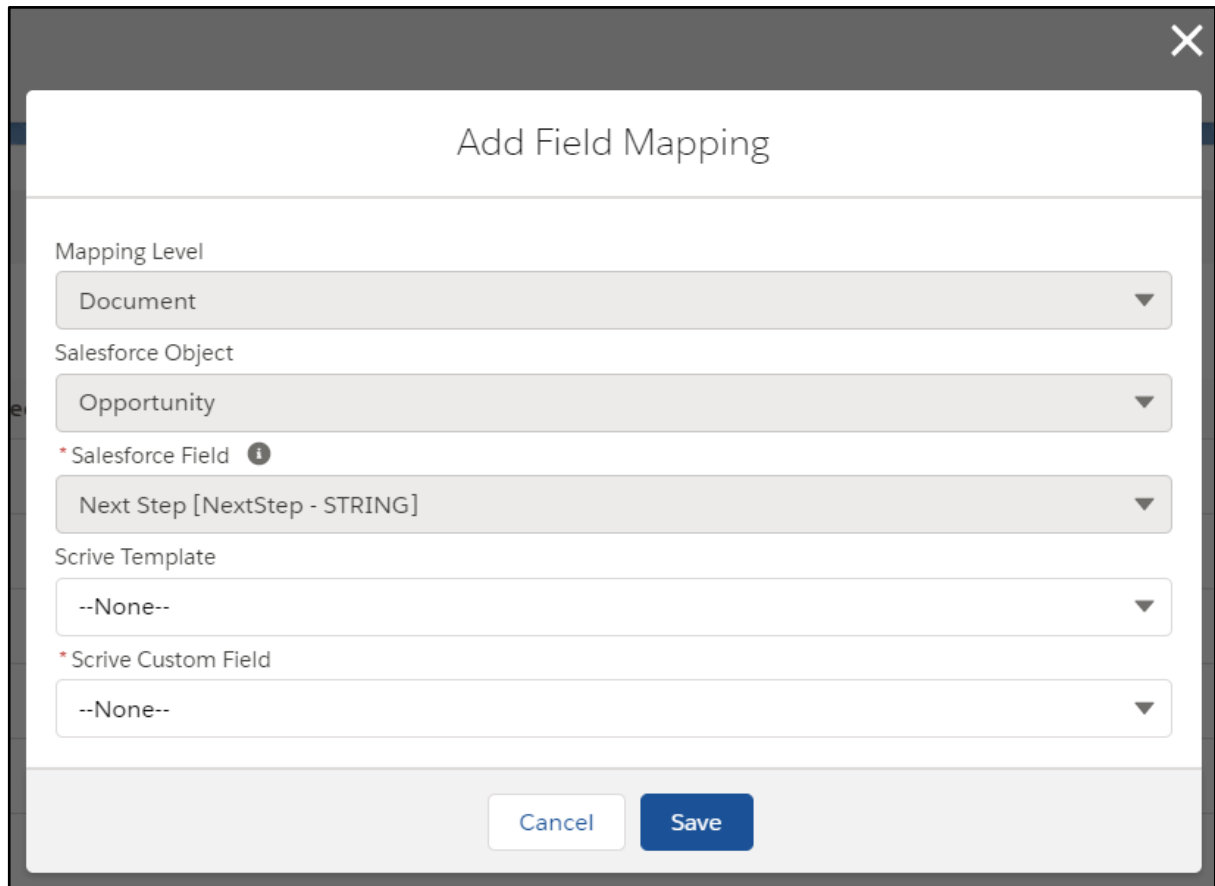
When a Field Mapping record is created it has to be activated by checking the 'Salesforce to Scribe' and/or 'Scribe To Salesforce' checkboxes (according to the requirements). The pencil icon will activate the edit mode.

Field Mappings							Add Field Mapping	
Mapping Level	Salesforce Object	Salesforce Field	Scribe Field		Salesforce To Scribe	Scribe To Salesforce		
1 Document	Opportunity	NextStep	testTextField	£3				

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 Scribe part of the definition ('Scribe Template' and 'Scribe 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 portal (please, review [Scrive User permission - management](#) section).



The image shows a modal dialog box titled "Add Field Mapping" with a close button (X) in the top right corner. The dialog contains five dropdown menus for configuration:

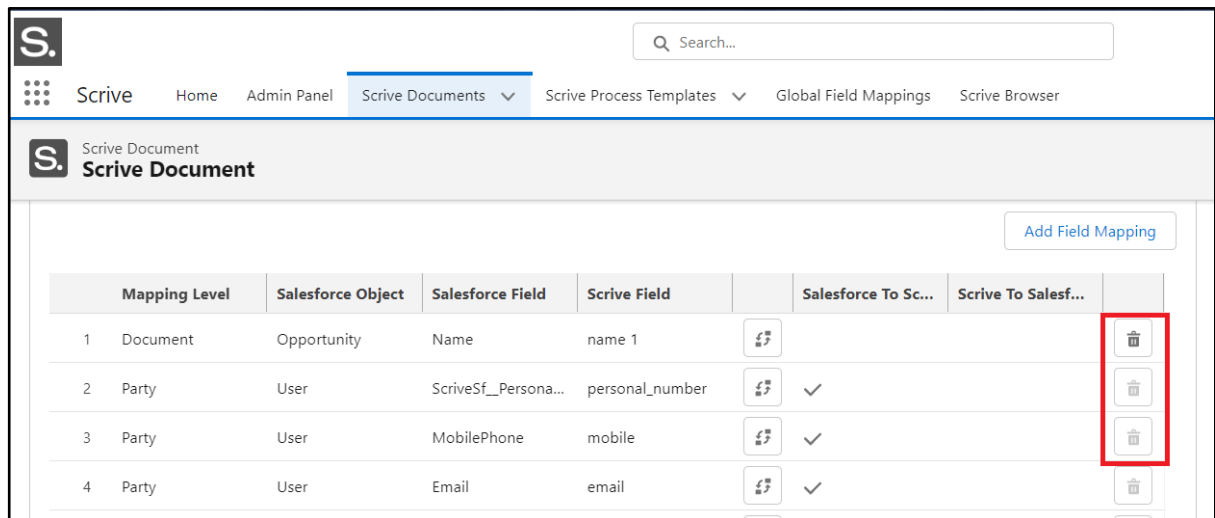
- Mapping Level:** A dropdown menu with "Document" selected.
- Salesforce Object:** A dropdown menu with "Opportunity" selected.
- * Salesforce Field:** A dropdown menu with "Next Step [NextStep - STRING]" selected. An information icon (i) is visible next to the label.
- Scrive Template:** A dropdown menu with "--None--" selected.
- * Scrive Custom Field:** A dropdown menu with "--None--" selected.

At the bottom of the dialog, there are two buttons: "Cancel" and "Save".

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' 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, the page title is 'Scrive Document'. A table lists mappings with columns: Mapping Level, Salesforce Object, Salesforce Field, Scrive Field, and two columns for bidirectional mapping. A red box highlights the delete icons in the rightmost column.

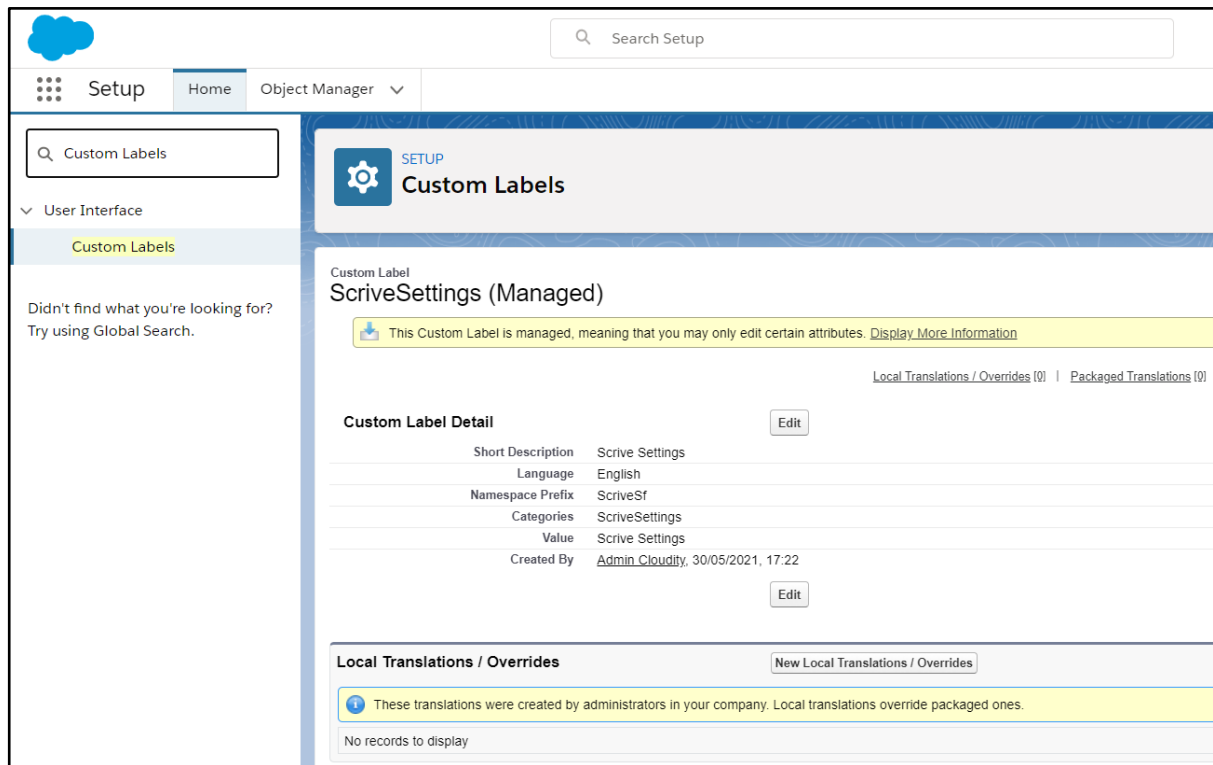
Mapping Level	Salesforce Object	Salesforce Field	Scrive Field	Scrive To Salesforce	Salesforce To Scrive	Actions
1	Document	Opportunity	Name	name 1		
2	Party	User	ScriveSf_Persona...	personal_number	✓	
3	Party	User	MobilePhone	mobile	✓	
4	Party	User	Email	email	✓	

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](#)).



For now the package is only in English.

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

7.1 Custom Object as Related Record to Scribe Document

To use a custom object as a Related Record on a Scribe Document, the System Administrator has to create a new lookup relationship on a Scribe 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 Scribe Document (otherwise the Related Record component on a Scribe 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

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

Scrive Document

New Custom Field

Help for this Page

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.

The screenshot shows the Salesforce Setup interface for the 'Scrive Document Party' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Sharing Rules. The main content area is titled 'New Custom Field' and shows 'Step 1. Choose the field type'. Below this, a table lists data types: 'None Selected' (selected), 'Auto Number', 'Formula', 'Roll-Up Summary', and 'Lookup Relationship' (highlighted with a red box). The 'Lookup Relationship' description states: '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.'

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 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

Days To Sign

Language

English

Days to Remind

Messages

Invitation Message

Confirmation Message

Signing Page Settings

Show Header

☒

Show Footer

☒

Show PDF Link

☒

Is Receipt

☐

Show Auto-Scroll Arrow

☒

Show Reject Button

☒

Allow Rejection Comment

☒

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://www.scrive.com) service).

S

Scrive Document
Scrive Document

Create Draft

Send

Delete

Scrive Document Name

Status

Language

ScriveDoc-0

New

English

Details

Parties

Attachments

Events

Information

Title

Scrive Document

Days To Sign

14

Language

English

Days to Remind

Messages

Invitation Message

Confirmation Message

Signing Page Settings

Show Header

☒

Is Receipt

☐

Show Footer

☒

Show Auto-Scroll Arrow

☒

Show PDF Link

☒

Show Reject Button

☒

Allow Rejection Comment

☒

> System Information

Related Record

Related Record

Main File

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:

This screenshot shows a Scrive Document interface for a document named 'ScribeDoc-1'. The status is 'New' and the language is 'English'. At the top right, there are three buttons: 'Create Draft', 'Send', and 'Delete'.

Scribe Document Name	Status	Language
ScribeDoc-1	New	English

Available actions in 'Pending' status:

This screenshot shows a Scrive Document interface for a document named 'ScribeDoc-0'. The status is 'Pending' and the language is 'English'. At the top right, there are four buttons: 'Send Reminder', 'Withdraw', 'Refresh', and 'Open in Scrive'.

Scribe Document Name	Status	Language
ScribeDoc-0	Pending	English

Available actions in 'Closed' status:

This screenshot shows a Scrive Document interface for a document named 'ScribeDoc-0'. The status is 'Closed' and the language is 'English'. At the top right, there are four buttons: 'Forward', 'Refresh', 'Open in Scrive', and 'Delete'.

Scribe Document Name	Status	Language
ScribeDoc-0	Closed	English

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.

This screenshot shows the 'Related Record' component. It has a search bar with the text 'test' and a magnifying glass icon. Below the search bar, there is a list of results. The first result is 'Test Opportunity' with a crown icon and the word 'Opportunity' below it.

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).

The screenshot shows a user interface for a 'Main File' section. At the top, there is a header 'Main File'. Below it, a label 'Select Source Category' is positioned above a dropdown menu. The dropdown menu is currently open, displaying a list of options: '--None--', 'Scrive Template', 'From File', 'Visualforce PDF Template', and 'Lightning File From Related Record'. The dropdown menu has a 'Select...' placeholder text and a downward arrow icon.

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).

8.3.1 Import Configuration and Save

When Scrive Template is selected as the Source Category, it is possible to import Configuration from Scrive Template (including Scrive Document parameters, amount of Scrive Document Parties and Scrive Document Parties parameters).

This option will ensure that the configuration from Scrive Template and configuration in SF is consistent.

The image shows a 'Main File' configuration window. It has a title bar at the top. Below the title bar, there is a section labeled 'Main File'. Under this section, there are two labels: 'Scrive Template' and 'Sample contract'. Below these labels, there are two dropdown menus. The first dropdown menu is labeled 'Select Source Category' and has 'Scrive Template' selected. The second dropdown menu is labeled 'Select Source' and has 'Sample contract' selected. At the bottom of the window, there are three buttons: 'Cancel', 'Save', and 'Import Configuration and Save'.

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. If Party is optional (i.e. on the Scrive Process Template Party checkbox "Remove Empty Party on Send" was selected), the tab is marked as Optional Party.

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	Salesforce Object	Salesforce Field	Scrive Field		Salesforce To Scrive	Scrive To Salesforce	
1	Party	User	FirstName	name 1		✓		
2	Party	User	LastName	name 2		✓		
3	Party	User	Email	email		✓		
4	Party	User	MobilePhone	mobile		✓		
5	Party	Contact	ScriveSf_PersonalNum...	personal_number		✓	✓	
6	Party	Contact	FirstName	name 1		✓	✓	
7	Party	Contact	LastName	name 2		✓	✓	

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

Party Source

Document Party
New Party

There is an option to switch with toggle button between Parties view as tabs and table

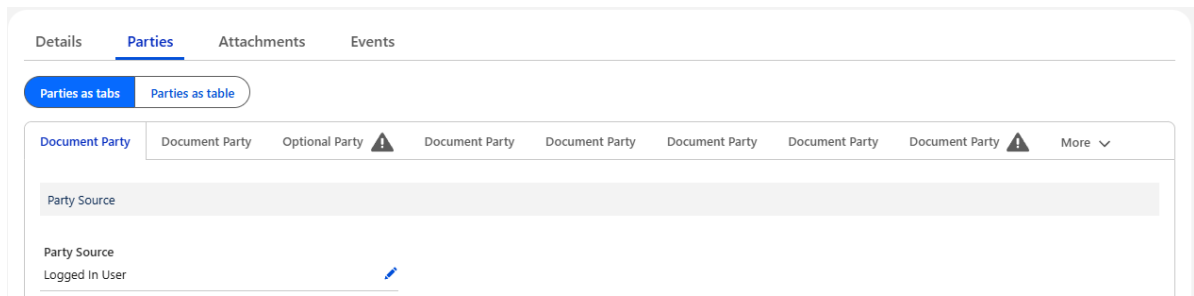


Table view is useful when there are many Parties in a document and can be reviewed all at once.

Party Name	Party Source	Type	Signing Order	Signatory Role	Party Status	
Document Party	Logged In User		1	Viewer	Delivery Issue	
Document Party	Email	test.email@gmail.com	1	Approver		
Document Party	Email And Name	Test Name (test.email...	1	Signing Party		
Document Party	Record	Andy Young	1	Forwarder	Opened	
Document Party	Record	ScriveSf_Contact_c	1	Viewer		
Document Party	Record	User User	1	Viewer		
Document Party	Record	ScriveSf_User_c	1	Viewer		
Document Party	Email		1	Viewer		
Document Party	Record		1	Viewer		

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.

Document Party

Document Party

New Party

Party Source

Party Source

Logged In User

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

The screenshot shows a form titled 'Party Source'. It has two dropdown menus: 'Party Source' with 'Email' selected, and 'Type' with 'Static' selected. There is an empty 'Email' input field on the right. At the bottom are 'Cancel' and 'Save' buttons.

- **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.

The screenshot shows a form titled 'Party Source'. It has two dropdown menus: 'Party Source' with 'Email And Name' selected, and 'Type' with 'Static' selected. Below these are input fields for 'Email', 'First Name', and 'Last Name'. At the bottom are 'Cancel' and 'Save' buttons.

- **Record**

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

The screenshot shows a form titled 'Party Source'. It has two dropdown menus: 'Party Source' with 'Record' selected, and 'Type' with 'Contact [ScriveSf_Contact_c - Contact]' selected. To the right of the 'Type' dropdown is a search input field with the placeholder text 'Search undefined...'. At the bottom are 'Cancel' and 'Save' buttons.

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 enforce 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

✓ No extra authentication

Swedish BankID

PIN by SMS

Norwegian BankID

NemID with CPR

NemID with CPR

NemID

NemID with CPR/CVR

Cancel Save

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

Authentication

Authentication to Sign: No extra authentication

Authentication to View: Swedish BankID

✓ No extra authentication

Swedish BankID

PIN by SMS

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".

Document Party
Document Party
New Party
Delete

Party Source
Party Source

Details
Signing Order
1
Signatory Role
Signing Party
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

Party Request Attachments
Add
No request attachments...

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.

New Request Party Attachment

* Name

Description

Merge With Main File

Required

☐

☐

Cancel
Save & New
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					Add
	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							
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 point the directions of the mapping and are still editable. Those values trigger the field mapping logic.

Field Mappings							
Add Field Mapping							
Field Mapping edit mode is disabled, when the source of the document is not based on Scrive Document Template or User is missing Scrive User Permission.							
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.

NOTE: When package is upgraded to v1.25 or higher, new value “forwarded_party” must be added to picklist on field ScriveSf__DocumentParty__c.ScriveSf__SignatoryRole__c

Values				
NewReorderReplacePrintable ViewChart Colors Delete SelectedDeactivate SelectedReplace Selected				
Action	Values	API Name	Default	Chart Colors
☐ Edit Del Deactivate	Approver	approver	☐	Assigned dynamically
☐ Edit Del Deactivate	Hidden Approver	hidden_approver	☐	Assigned dynamically
☐ Edit Del Deactivate	Signing Party	signing_party	☐	Assigned dynamically
☐ Edit Del Deactivate	Viewer	viewer	☒	Assigned dynamically
☐ Edit Del Deactivate	Forwarder	forwarded_party	☐	Assigned dynamically

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

New Document Attachment

Scrive Document Name
ScriveDoc-9

* Source Type
From File

* Name

Attachment to add
[Upload Files](#) Or drop files

Merge With Main File ☐

Required to review ☐

[Cancel](#) [Save & New](#) [Save](#)

No attachments found...

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

The screenshot shows a modal window titled "New Document Attachment". At the top right, there are buttons for "Update Draft", "Send", and "Remove Pages". The form contains the following fields and options:

- Scrive Document Name:** A text field containing "ScriveDoc-9".
- * Source Type:** A dropdown menu with "Lightning File From Related Record" selected.
- * Name:** An empty text field.
- * Selected option for chosen Source Type:** A dropdown menu with "Select..." selected.
- Merge With Main File:** An unchecked checkbox.
- Required to review:** An unchecked checkbox.

Below the form, there are three buttons: "Cancel", "Save & New", and "Save". A red error message "Source Not Found For Selected Category!" is displayed below the "Selected option" dropdown. At the bottom of the modal, the text "No attachments found..." is visible.

- [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.

This screenshot shows the same "New Document Attachment" modal window, but with "Visualforce PDF Template" selected in the "Source Type" dropdown. The "Selected option for chosen Source Type" dropdown still shows "Select...". All other fields and buttons remain the same as in the previous screenshot.

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		
Attachment from file	From File	Jun 29, 2021	preview	
Attachment from VF page	Visualforce PDF Template	Jun 29, 2021	preview	
Attachment Lightning File from related record	Lightning File From Related Record	Jun 29, 2021	preview	

8.6 Events tab

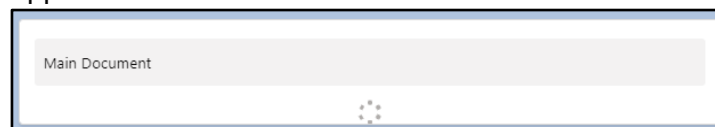
The Events tab displays all historical events related to the document. The table is in a read-only mode and the records are stored in the Salesforce.

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.

Srive Document
Srive Document

[Send Reminder](#)
[Withdraw](#)
[Refresh](#)
[Open in Scribe](#)

Srive Document Name
SriveDoc-0

Status
Pending

Language
English

Details

Parties

Attachments

Events

Information

Title
Srive Document

Days To Sign
14

Language
English

Days to Remind

Messages

Invitation Message

Confirmation Message

Signing Page Settings

Show Header

☒

Show Footer

☒

Show PDF Link

☒

Is Receipt

☐

Show Auto-Scroll Arrow

☒

Show Reject Button

☒

Allow Rejection Comment

☒

System Information

Related Record

No Related Record

Main File

Visualforce PDF Template
ExampleSrivePdfPage

Main Document

Welcome to Scribe!

Thank you, for using Scribe.
WE WISH YOU A PLEASANT JOURNEY!

9. Scribe Process Template

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

9.1 Highlights panel

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

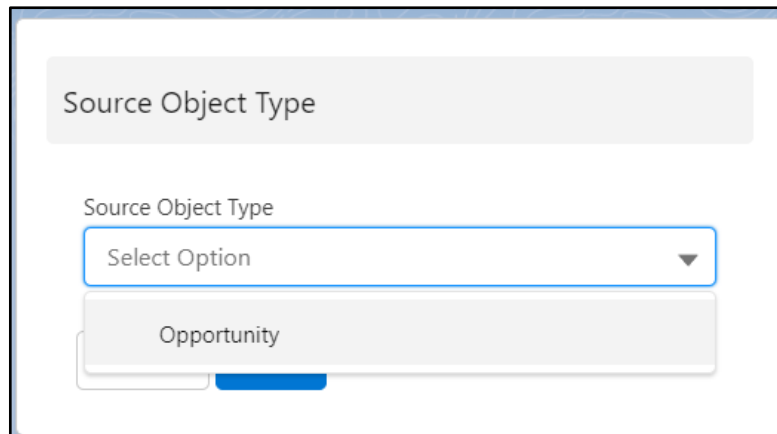
Srive Process Template
Srive Process Template

[Import Configuration from Scribe](#)

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 user interface 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. The picklist itself is a white box with a blue border and a blue outline, containing the text 'Select Option' and a downward-pointing arrow. Below the picklist, a light gray box displays the selected option, 'Opportunity'. A blue horizontal bar is visible at the bottom of the 'Opportunity' box, indicating it is the active selection.

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.

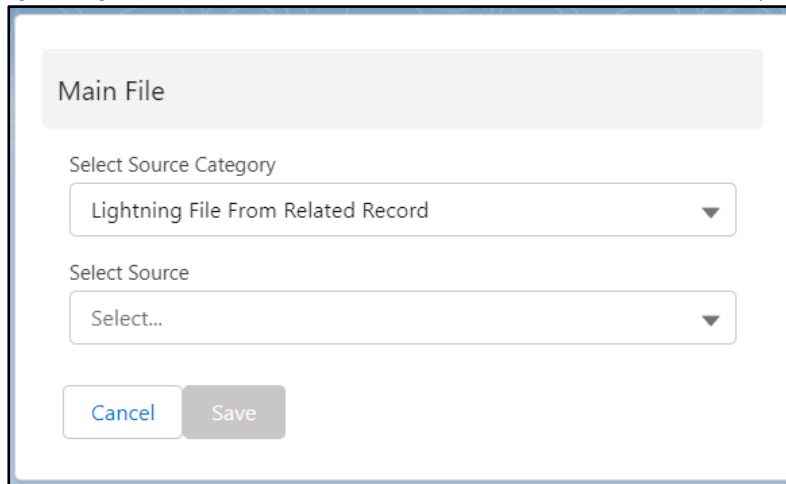
Main File

Select Source Category
Visualforce PDF Template

Select Source
Select...

[Cancel](#) [Save](#)

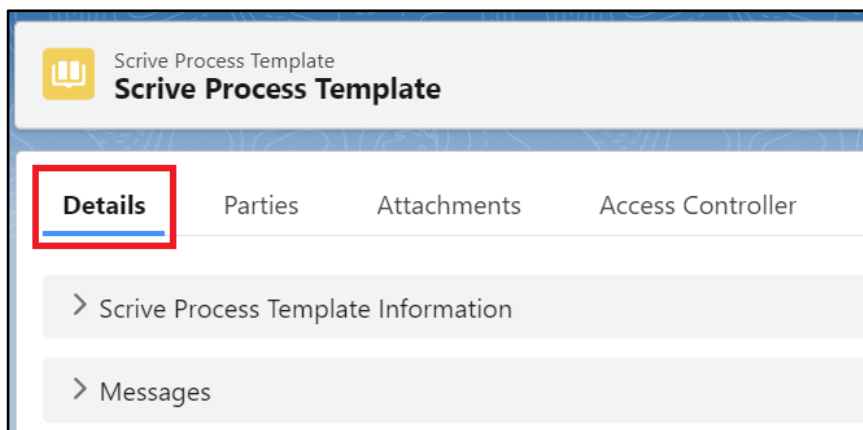
- Lightning File From Related Record - related Lightning File from related record. From the Scrive Process Template context the Lightning Files from the related record are unknown. Because of that, 'Newest' and 'Oldest' options can be selected (newest or oldest Lightning File from related record based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



9.4.1 Override Document Title

In the Scrive Process Template Information tab a "Overridden Document Title" field is available. This field allows to override Document Name during document creation from Process Template.

User can use merge fields from related object by adding field API name in brackets '{!}' (e.g. {!Opportunity.Name}_{!Opportunity.CreatedDate}).

Only fields from the object related to the Process Template are supported. More complex merge fields could be accomplished by adding technical formula fields to the related object

(which could pull information from other relations) and referencing those formula fields in the Override Document Title field.

Details	Parties	Attachments	Access Controller
---------	---------	-------------	-------------------

▼ Scrive Process Template Information

Scrive Process Template Name	Days To Sign
sample2 (1)	90
Scrive Process Template Unique Name	Days to Remind
ScriveProcessTemplate_1717949692937	
Language Definition	Send Document Immediately ⓘ
Static	☐
Language	Number Of Parties
English	2
Overridden Document Title ⓘ	
{!Opportunity.Name}_{!Opportunity.CreatedDate}	

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
Template Party
Template 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
☐

Optional Party
☐

Remove Empty Party On Send ⓘ
☐

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

There is an option to switch with toggle button between Parties view as tabs and table

Details
Parties
Attachments
Access Controller

Parties as tabs
Parties as table

Template Party
Template Party
Template Party
Template Party
Template Party
Template Party
Template Party
Template Party 1 Test Edit
More

Party Source

Party Source
Logged In User

Table view is useful when there are many Parties in a process template and can be reviewed all at once.

Details Parties Attachments Access Controller					
Parties as tabs		Parties as table		New Party	
Scrive Process Template Name	Party Source	Type	Signing Order ↑	Signatory Role	
Template Party	Logged In User		1	Viewer	 
Template Party	Email	 test.email@gmail.com	1	Signing Party	 
Template Party	Email		1	Approver	 
Template Party	Email And Name	 FirstName LastName (firstlastn...	1	Hidden Approver	 
Template Party	Record	Ownerid	1	Viewer	 
Template Party 1 Test Edit	Record	Contactid	1	Viewer	 
Template Party	Record	ScriveSF__ContactRole__c	1	Viewer	 
Template Party	Email And Name		1	Viewer	 

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.

Details
Parties
Attachments

Template Party
Template Party
New Party

Party Source

Party Source

Logged In User

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

Party Source

Party Source
Type
Email

Email
Static

Cancel
Save

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

Party Source

Party Source: Email

Type: Merge

Merge: Select an Option

Cancel Save

- **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).
- **NOTE:** When Remove Empty Party On Send is selected, party without provided value on scrive document party (Email when Party Source is Email/Email And Name or Type/RelatedRecord when Party Source is Record) will be removed on send action

- **Email And Name**

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

Party Source

Party Source: Email And Name

Type: Static

Email:

First Name:

Last Name:

Cancel Save

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

Party Source

Party Source: Email And Name

Type: Merge

Merge Email: Select an Option

Merge First Name: Select an Option

Merge Last Name: Select an Option

Cancel Save

- **NOTE:** When Remove Empty Party On Send is selected, party without provided value on scrive document party (Email when Party Source is Email/Email And Name or Type/RelatedRecord when Party Source is Record) will be removed on send action

- **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.

The screenshot shows a 'Party Source' configuration window. It contains three dropdown menus: 'Party Source' (with 'Record' selected), 'Type' (with 'Merge' selected), and 'Merge' (with 'Select an Option' selected). Below the 'Merge' dropdown, two options are visible: 'Owner ID [OwnerId - User]' and 'Contact ID [ContactId - Contact]'. There are 'Cancel' and 'Save' buttons in the center.

Example 2:

Having the following:

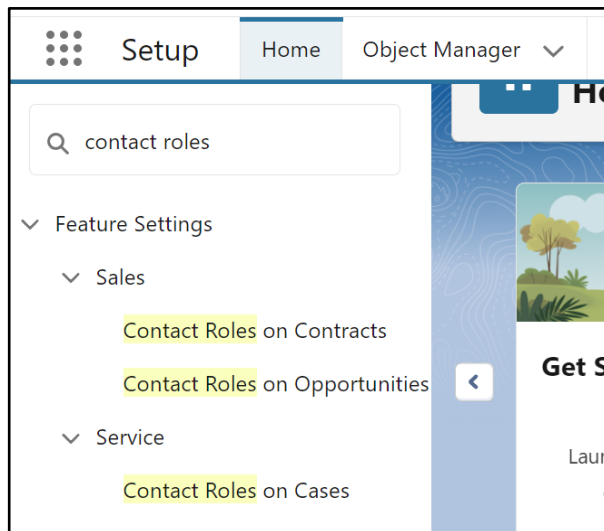
- Document Party has a lookup relation to a BusinessPerson object (DocumentParty__c.BusinessPerson__c),
- Source Object on a Process Template is selected as Opportunity,
- Opportunity Object has a lookup relationship field to the BusinessPerson object (Opportunity.BusinessPerson__c)

User can:

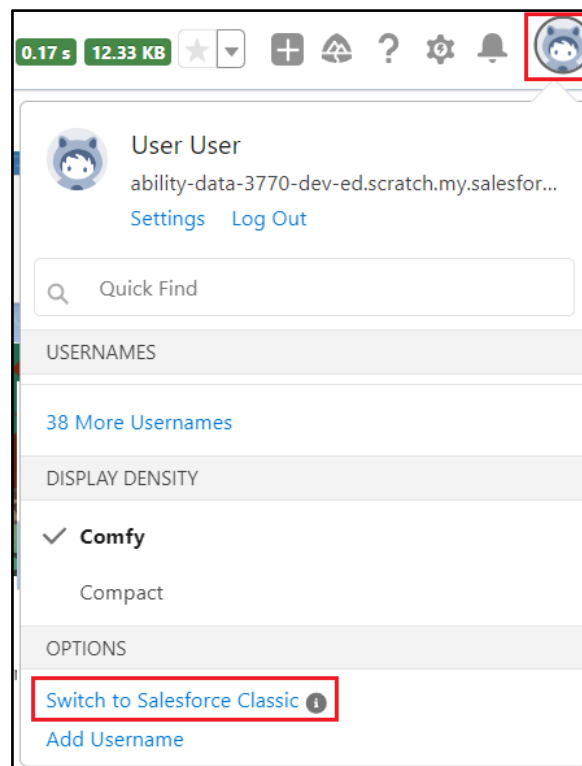
- Select additionally the Template Party Source with Type Merge as Opportunity.BusinessPerson__c.

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](#)

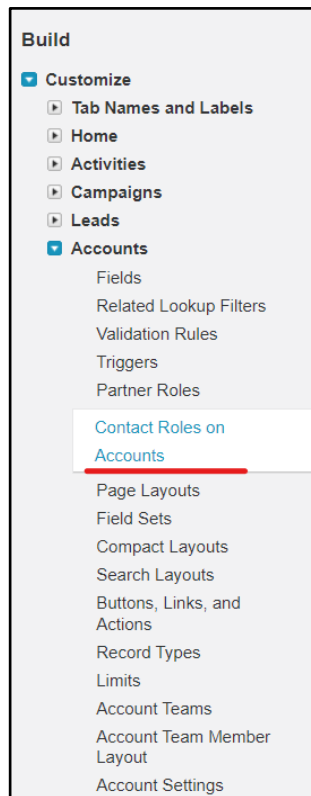
- **Contact Role** - available when 'Opportunity', 'Account', 'Case' or 'Contract' is selected as Source Object for the Scrive Process Template
 - List of Contact Roles defined on the SObject can be found in 'Setup > Contact Roles'. This option provides the possibility to point the Contact record as 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					
Edit Del Deactivate	Business User	Business User	☐					
Edit Del Deactivate	Decision Maker	Decision Maker	☐					
Edit Del Deactivate	Economic Buyer	Economic Buyer	☐					
Edit Del Deactivate	Economic Decision Maker	Economic Decision Maker	☐					
Edit Del Deactivate	Evaluator	Evaluator	☐					
Edit Del Deactivate	Executive Sponsor	Executive Sponsor	☐					
Edit Del Deactivate	Influencer	Influencer	☐					
Edit Del Deactivate	Technical Buyer	Technical Buyer	☐					
Edit Del Deactivate	Other	Other	☐					

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

Burlington Textiles Corp of America

Hide Feed | Click to add topics

Post | File | New Task | More

Write something... | Share | Follow

Followers

No followers.

Show All Updates

There are no updates.

Contact Roles (0) | Contacts (1) | Opportunities (1) | Cases (0) | Open Activities (0) | Activity History (0) | Notes & Attachments (0) | Partners (0)

Account Detail

Account Owner: User User (Change)

Account Name: Burlington Textiles Corp of America (View Hierarchy)

Parent Account: [Blank]

Account Number: CD656092

Account Site: [Blank]

Type: Customer - Direct

Industry: Apparel

Annual Revenue: \$350,000,000

Billing Address: 525 S. Lexington Ave, Burlington, NC 27215, USA

Customer Priority: [Blank]

SLA Expiration Date: 10/23/2023

Number of Locations: 6

Active: [Blank]

Created By: User User, 9/28/2023, 11:32 PM

Description: [Blank]

Custom Links: Billing

Rating: Warm

Phone: (336) 222-7000

Fax: (336) 222-8000

Website: http://www.burlington.com

Ticker Symbol: BTXT

Ownership: Public

Employees: 9,000

SIC Code: 546732

Shipping Address: [Blank]

SLA: Silver

SLA Serial Number: 5367

Upsell Opportunity: Maybe

Last Modified By: User User, 9/28/2023, 11:32 PM

Contact Roles

No records to display

Contacts

New Contact | Merge Contacts

Action	Contact Name	Title	Email	Phone
Edit Del	Jack Rogers	VP, Facilities	jrogers@burlington.com	(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

Scrive Process Template

Details | **Parties** | Attachments | Access Controller

Template Party | **Template Party** | New Party

Party Source

Party Source: Record | Type: Contract Contact Role

Contact Role: Select an Option

- Business User
- Decision Maker
- Economic Buyer

Cancel | Save

Details

Source Object Type: Contract

Main File: Please provide Main File for Scrive Document

- **NOTE:** When Optional Party is selected, party is created on a scrive document only if source for the party exists
- **NOTE:** When Remove Empty Party On Send is selected, party without provided value on scrive document party (Email when Party Source is Email/Email And Name or Type/RelatedRecord when Party Source is Record) will be removed on send action

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.

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 ‘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 'Scribe 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 Scribe' and 'Scribe 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 Scribe Process Template.

Field Mappings

Add Field Mapping

Field Mapping edit mode is disabled, when the source of the document is not based on Scrive Document Template or User is missing Scrive User Permission.

	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

New Scrive Process Template Attachment

* Source Type
From File

* Name

Attachment to add
Upload Files Or drop files

Merge With Main File
☐

Required to review
☐

Cancel Save & New Save

- 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).

New Scrive Process Template Attachment

* Source Type
Lightning File From Related Record

* Name

* Selected option for chosen Source Type
Select...
Newest
Oldest

Merge With Main File
☐

Cancel Save & New Save

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

New Scrive Process Template Attachment

* Source Type
Visualforce PDF Template

* Name

* Selected option for chosen Source Type
Select an Option

Merge With Main File
☐

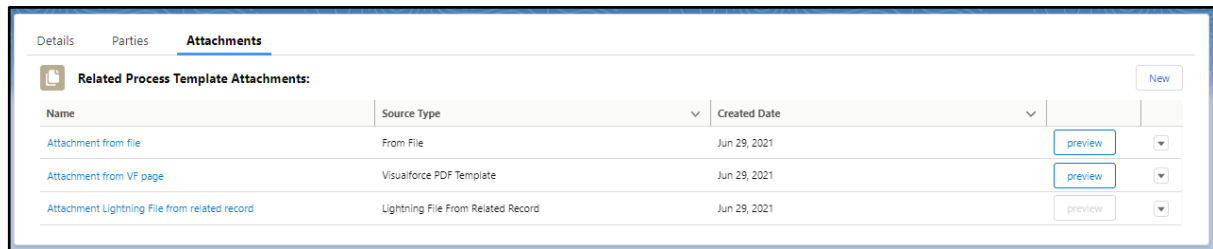
Required to review
☐

Cancel Save & New Save

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.



The screenshot shows the 'Attachments' tab in Salesforce. It displays a table of 'Related Process Template Attachments' with columns for Name, Source Type, Created Date, and a preview button. The table contains three rows: 'Attachment from file' (From File), 'Attachment from VF page' (Visualforce PDF Template), and 'Attachment Lightning File from related record' (Lightning File From Related Record). The last row's preview button is disabled.

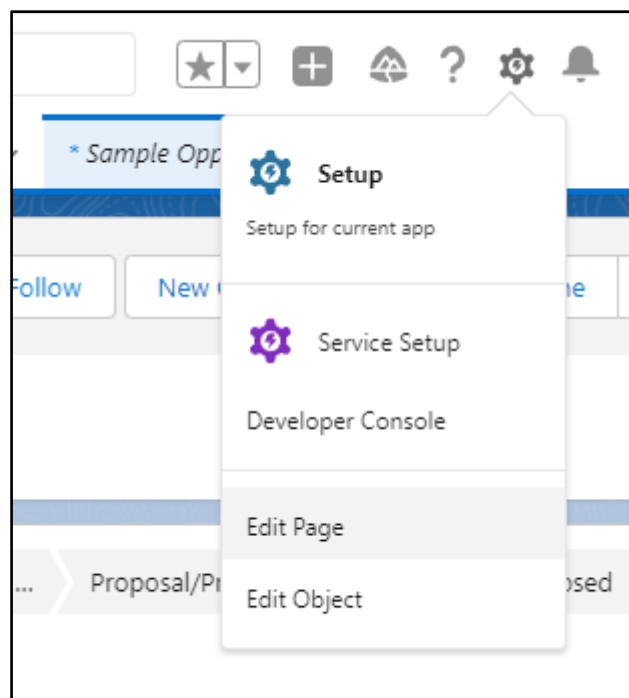
Name	Source Type	Created Date	Preview
Attachment from file	From File	Jun 29, 2021	preview
Attachment from VF page	Visualforce PDF Template	Jun 29, 2021	preview
Attachment Lightning File from related record	Lightning File From Related Record	Jun 29, 2021	preview

9.7 Start Scrive Process Template From Record

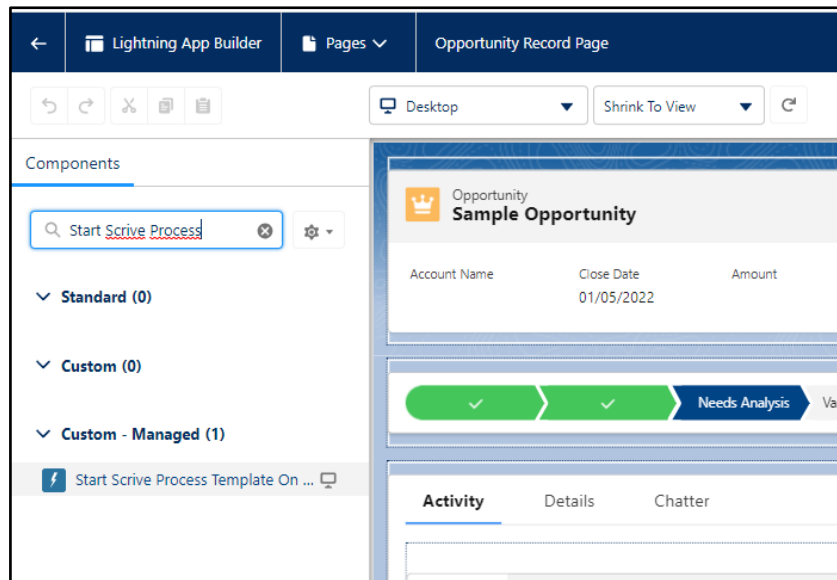
When the Scrive Process Template is already defined it's time to use it from the Salesforce record level. **“Start Scrive Process Template On Record”** lightning component should be used on a lightning record page to define a button that will trigger the Scrive Process Template execution in the context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

Process is presented for an Opportunity object, but the “Scribe 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.

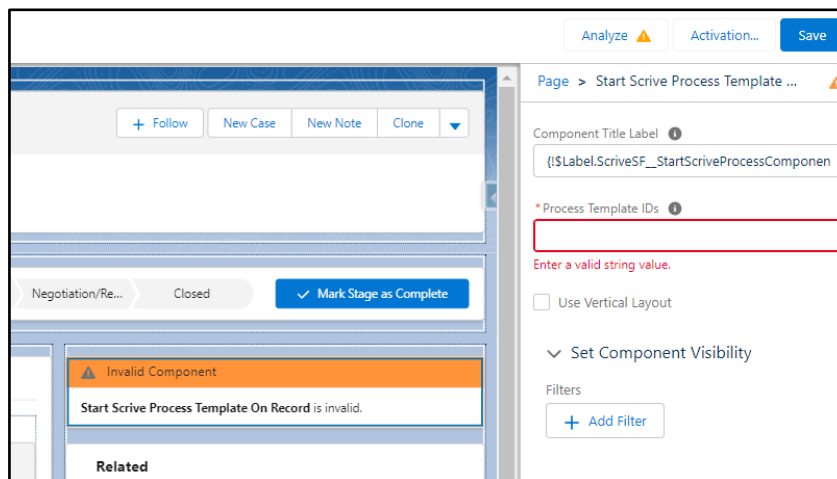
To use “Start Scrive Process Template On Record” lightning component should be placed on a lightning record page. Lightning record page can be edited using Gear Icon > “Edit Page” from the lightning record page or from Setup > Lightning App Builder.



“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.

Scribe Process Template

Details | Parties | Attachments | Access Controller

▼ Scribe Process Template Information

Scribe Process Template Name
Scribe Process Template

Scribe Process Template Unique Name
ScribeProcessTemplate_1680774794492

Language Definition
Static

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

Analyze ⚠️ | Activation... | Save

Page > Start Scribe Process Template ...

Component Title Label ⓘ
{!\$Label.ScribeSF__StartScribeProcessComponen

* Process Template IDs ⓘ
SampleProcessTemplate_1652092262013,temp

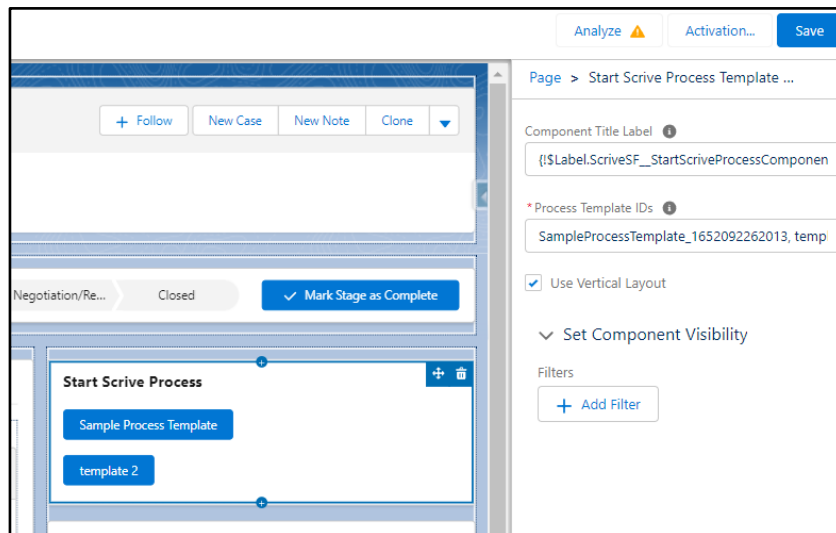
☐ Use Vertical Layout

▼ Set Component Visibility

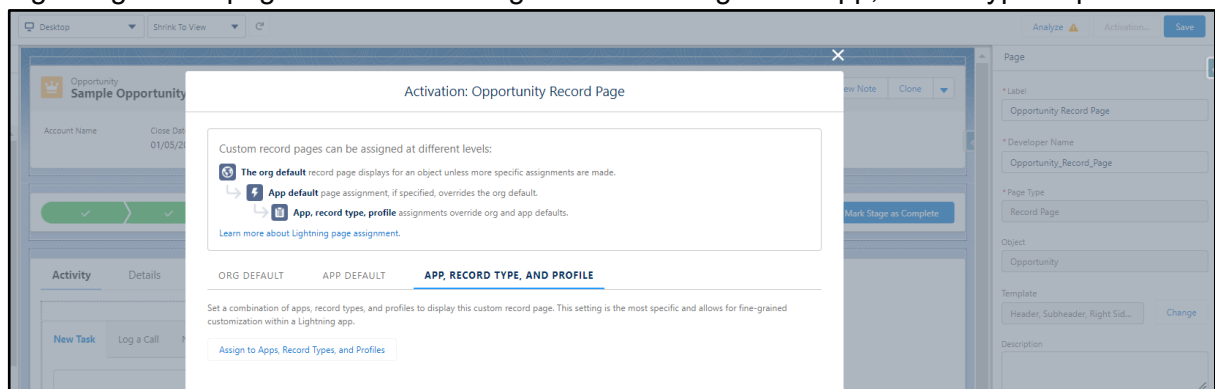
Filters
+ Add Filter

- **Use Vertical Layout**

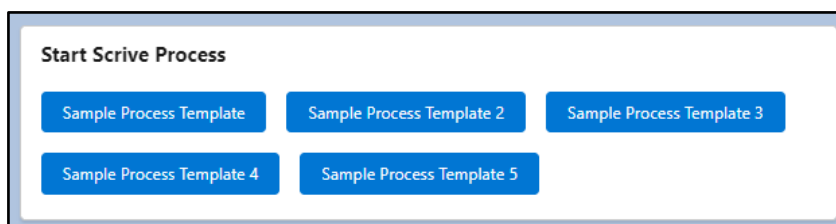
- By default, it is unchecked - Scribe Process Template buttons will be placed in a single row if possible.
- If it is checked, each Scribe Process Template button will be placed in a new row.



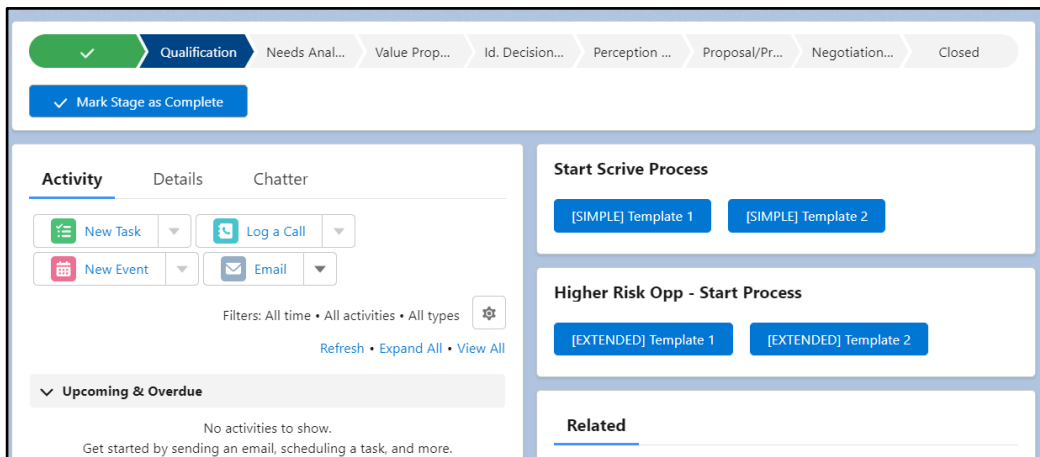
Lightning record page can be set as org default or assigned to app, record type or profile.



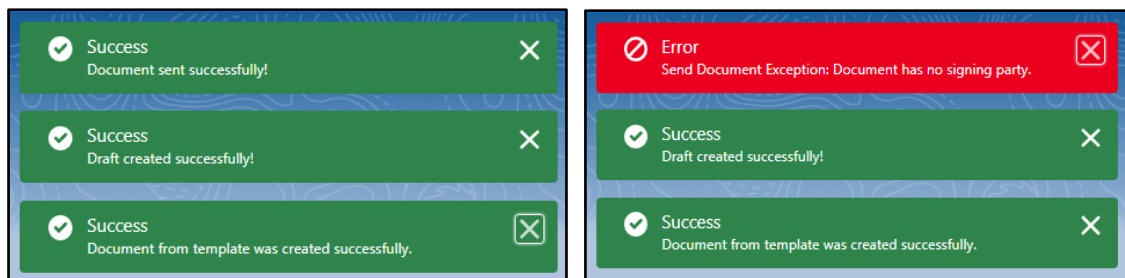
To execute the Scrive Process Template in the context of the current record, the button on a component has to be clicked.



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

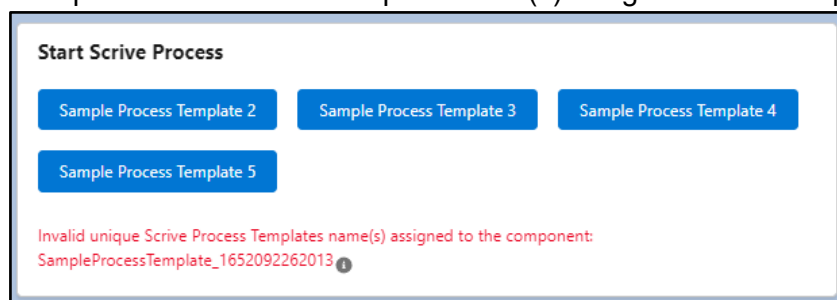


When the process will be started the process status messages will be printed as toasts. If the process will create a Scrive Document successfully, the logic will redirect to the Scrive Document record. Sample toast messages:



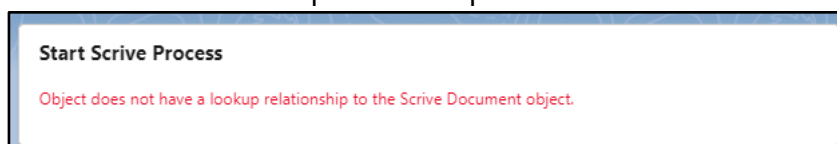
9.7.1 Troubleshooting

→ 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

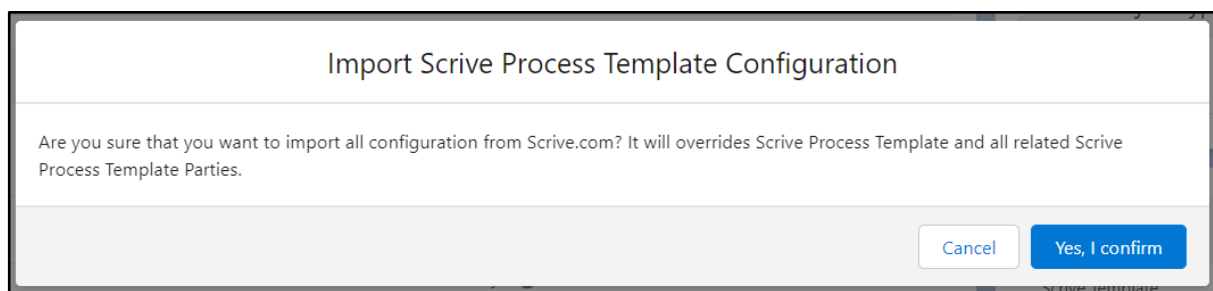


- ◆ Source object of the Lightning Record Page does not have a relationship to the Scrive Document object (it can be added to support Scrive Process Templates - details: [Custom Object as Related Record to Scrive Document](#))

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).

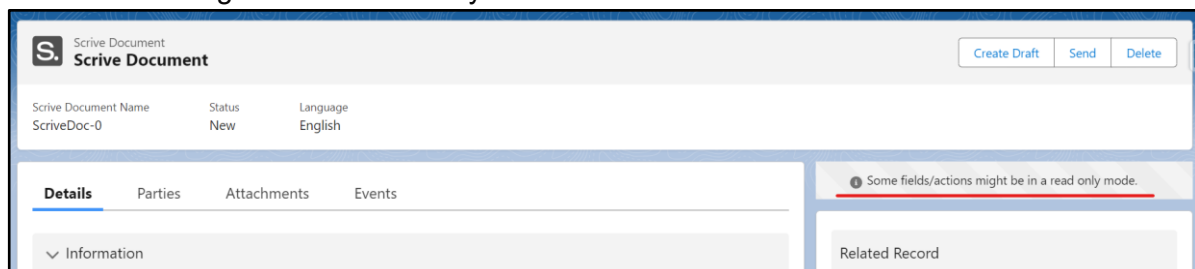
Note: the user has to be aware that the import of the configuration from scrive template will override current setup and must confirm the prompt message after pressing the button.



9.9 Access Controller

Scrive Process Template Access Controller is an additional permissions layer that enables/disables specific actions on a Scrive Document created based on a given Scrive Process Template. Scrive Process Template Access Controller setup indicates if some adjustments to the Scrive Document created from Scrive Process Template are possible.

For Scrive Document based on a Scrive Process Template there is a note that some fields/actions might be in a read only mode.



By default, all adjustments are blocked to ensure full control over the process and limit manual errors, but the Access Controller setup can relax the process and enable some changes to the Scrive Document created based on the Scrive Process Template before sending the document.

Access Controller setup is divided on 4 levels represented by 4 tabs: Document, Parties, Attachments and Field Mappings. Each tab is divided into sections, some of them represent

specific actions that can be enabled, some of them represent field sections from specific layouts where specific fields can be marked as editable.

9.9.1 Access Controller on a Document level

Access Controller for a Document level allows editing of fields from “*Information*”, “*Messages*” and “*Signing Pages Settings*” sections and allows enabling of “*Change Related Record*” and “*Change Main File*” actions.

The screenshot shows the 'Access Controller' tab for a 'Document' level. The interface includes a top navigation bar with 'Details', 'Parties', 'Attachments', and 'Access Controller'. Below this, a sub-navigation bar shows 'Document', 'Parties', 'Attachments', and 'Field Mappings'. The main content area is divided into four sections: 'Document Info (Fields)', 'Document Messages (Fields)', 'Document Signing Page Settings (Fields)', and 'Document Permissions'. Each section contains a list of fields with checkboxes and edit icons. The 'Document Info (Fields)' section includes 'Title', 'Days To Sign', 'Language', and 'Days to Remind'. The 'Document Messages (Fields)' section includes 'Invitation Message' and 'Confirmation Message'. The 'Document Signing Page Settings (Fields)' section includes 'Show Header', 'Show Footer', 'Show PDF Link', 'Is Receipt', 'Show Auto-Scroll Arrow', 'Show Reject Button', and 'Allow Rejection Comment'. The 'Document Permissions' section includes 'Change Related Record' and 'Change Main File'.

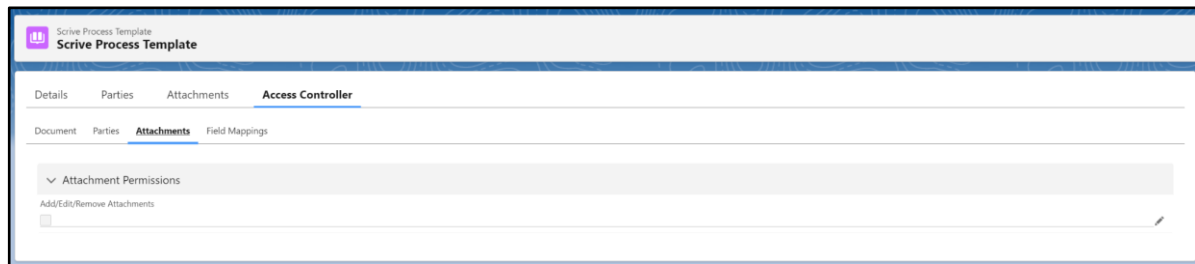
9.9.2 Access Controller on a Parties level

Access Controller for a Parties level allows editing of fields from “*Details*”, “*Delivery*” and “*Authentication*” sections and allows enabling of “*Create/Remove Party*”, “*Manage Party Source Definition*”, “*Manage Party Source*” and “*Manage Request Attachments*” actions.

The screenshot shows the 'Access Controller' tab for a 'Parties' level. The interface includes a top navigation bar with 'Details', 'Parties', 'Attachments', and 'Access Controller'. Below this, a sub-navigation bar shows 'Document', 'Parties', 'Attachments', and 'Field Mappings'. The main content area is divided into four sections: 'Party Details (Fields)', 'Party Delivery (Fields)', 'Party Authentication (Fields)', and 'Party Permissions'. Each section contains a list of fields with checkboxes and edit icons. The 'Party Details (Fields)' section includes 'Signatory Order', 'Signatory Role', 'Hide Personal Number', 'Allow Highlighting', and 'Allow Forwarding'. The 'Party Delivery (Fields)' section includes 'Delivery Method' and 'Confirmation By'. The 'Party Authentication (Fields)' section includes 'Authentication to Sign', 'Authentication to View', and 'Authentication to View Archived'. The 'Party Permissions' section includes 'Create/Remove Party', 'Manage Party Source Definition', 'Manage Party Source', and 'Manage Request Attachments'.

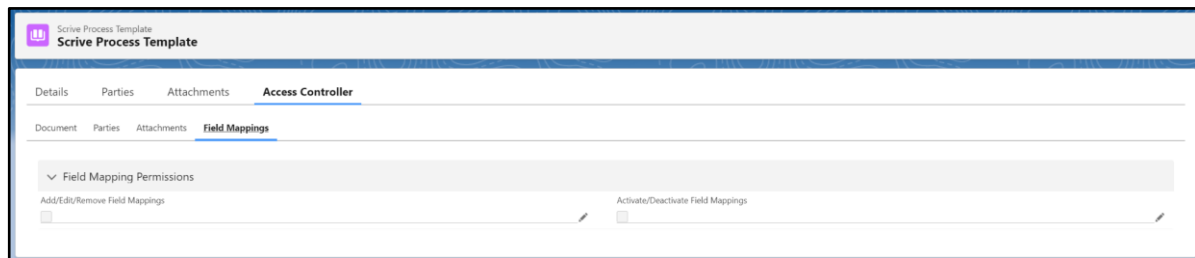
9.9.3 Access Controller on a Attachments level

Access Controller for an Attachments level allows enabling of “Add/Edit/Remove Attachments” action.



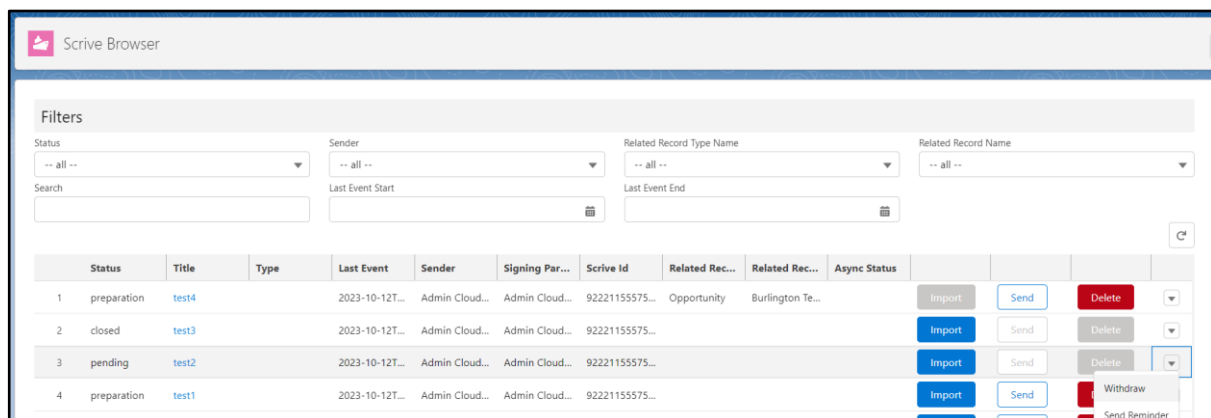
9.9.4 Access Controller on a Field Mappings level

Access Controller for a Field Mappings level allows enabling of “Add/Edit/Remove Field Mappings” and “Activate/Deactivate Field Mappings” actions.



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 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.

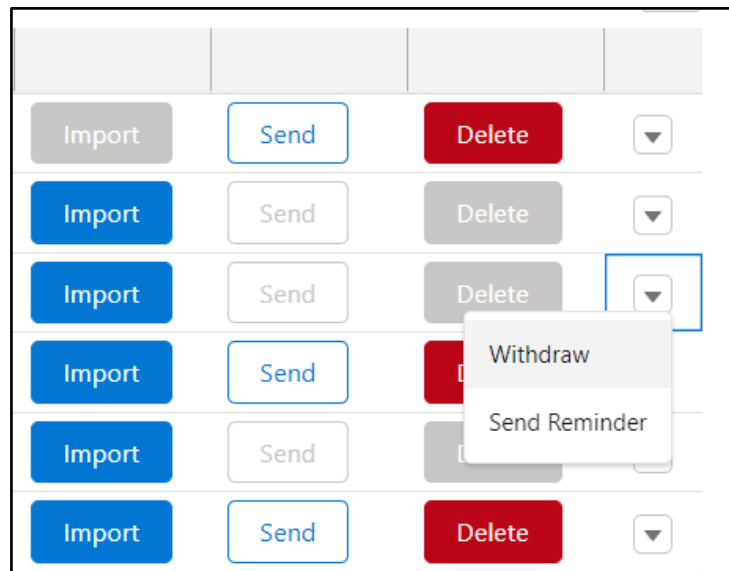
10.2 Filters

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).



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

Cancel
Import

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

The screenshot shows the Scrive Document interface for a document named 'test1'. At the top, there are buttons: 'Update Draft', 'Send', 'Remove Pages', 'Refresh', 'Open in Scrive', and 'Delete'. Below these, the document details are listed: Scrive Document Name (ScriveDoc-4), Status (Preparation), and Language (English). The main content area has tabs for 'Details', 'Parties', 'Attachments', and 'Events'. The 'Details' tab is active, showing a table with columns for 'Information' and 'Messages'. The 'Information' section includes fields for Title (test1), Language (English), Days To Sign (1), and Days to Remind. The 'Messages' section is currently empty. On the right side, there are two sections: 'Related Record' showing an 'Opportunity' named 'Burlington Textiles Weaving Plant Generator' with an edit icon, and 'Main File' showing 'Imported from Scrive.com' and '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:

The screenshot shows the Scrive Browser interface. At the top, there is a header with the Scrive Browser logo and name. Below the header, there is a large error message box that reads: "Logged In User does not have Scrive User Permission Set or Scrive Standard Api Credentials". Below this error message, there is a smaller message that reads: "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. Custom development has to be performed with an understanding of oAuth2 (e.g. avoiding parallel calls because parallel actions can cause problems and may require [re-authorization](#)).

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):

```

ScribeSf__Document__c document = new ScribeSf__Document__c(
    // Information
    ScribeSf__Title__c = 'Sample Document Title', // if not provided, the default name will be pulled
    // from 'DefaultScribeDocumentName' custom label
    ScribeSf__DaysToRemind__c = 2, // by default not provided
    ScribeSf__DaysToSign__c = 7, // if not provided, the default value provided in Scribe Settings (in 'Admin panel') will be populated
    ScribeSf__Language__c = 'en', // 'en' is a default value

    // Messages
    ScribeSf__ConfirmationMessage__c = 'sample confirmation message', // by default not provided
    ScribeSf__InvitationMessage__c = 'sample invitation message', // by default not provided

    // Signing Page Settings
    ScribeSf__IsReceipt__c = false, // by default 'false'
    ScribeSf__AllowRejectionComment__c = true, // by default 'true'
    ScribeSf__ShowAutoScrollArrow__c = true, // by default 'true'
    ScribeSf__ShowFooter__c = true, // by default 'true'
    ScribeSf__ShowHeader__c = true, // by default 'true'
    ScribeSf__ShowPdfLink__c = true, // by default 'true'
    ScribeSf__ShowRejectButton__c = true, // by default 'true'

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

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

    // Main File
    ScribeSf__SourceDocumentType__c = 'Visualforce PDF Template', // available options:
    // 'Scribe Template', 'From File',
    // 'Visualforce PDF Template', 'Lightning File From Related Record'
    ScribeSf__SourceDocumentRelatedRecordLightningFile__c = 'CONTENT_DOCUMENT_ID_FROM_RELATED_RECORD_ID',
    // has to be provided when
    // ScribeSf__SourceDocumentType__c = 'Lightning File From Related Record'
    ScribeSf__SourceDocumentScribeTemplateId__c = 'SCRIVE_TEMPLATE_ID',
    // has to be provided when ScribeSf__SourceDocumentType__c = 'Scribe Template'
    ScribeSf__SourceDocumentScribeTemplateName__c = 'SCRIVE_TEMPLATE_NAME',
    // has to be provided when ScribeSf__SourceDocumentType__c = 'Scribe Template'
    ScribeSf__SourceDocumentUploadedFileId__c = 'CONTENT_DOCUMENT_ID',
    // has to be provided when ScribeSf__SourceDocumentType__c = 'From File'
    ScribeSf__SourceDocumentVisualforcePageId__c = 'VISUALFORCE_PAGE_ID',
    // has to be provided when
    // ScribeSf__SourceDocumentType__c = 'Visualforce PDF Template'
);

insert document;

```

11.1.2 Scribe Document Party record definition

Note: First party is created automatically when the document record is created. It is a 'Logged in User' (Scribe 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):

```

ScribeSf__DocumentParty__c party = new ScribeSf__DocumentParty__c(
    // General
    ScribeSf__Document__c = document.Id,

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

    // Related Record - custom relationship can be defined (check 'Custom Object as a Source Record for the Scrive Document Party' section)
    // ScribeSf__PartySource__c = 'Record' and ScribeSf__Type__c = 'API Name of custom lookup relationship on a ScribeSf__Document__c object'
    ScribeSf__Contact__c = 'CONTACT_ID', // has to be provided if ScribeSf__PartySource__c = 'Record' and ScribeSf__Type__c = 'ScribeSf__Contact__c'
    ScribeSf__User__c = 'USER_ID', // has to be provided if ScribeSf__PartySource__c = 'Record' and ScribeSf__Type__c = 'ScribeSf__User__c'

    // Details
    ScribeSf__SigningOrder__c = 1, // by default set to 1
    ScribeSf__SignatoryRole__c = 'signing_party', // available options: 'viewer', 'signing_party', 'approver', 'hidden_approver'
    ScribeSf__HidePersonalNumber__c = false, // by default 'false'
    ScribeSf__AllowForwarding__c = false, // by default 'false'
    ScribeSf__AllowHighlightning__c = false, // by default 'false'

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

    // Authentication
    ScribeSf__AuthenticationToSign__c = 'standard', // by default set to 'standard' (No extra authentication) - available options
    // depends on what is enabled for the organisation
    ScribeSf__AuthenticationToView__c = 'standard', // by default set to 'standard' (No extra authentication) - available options
    // depends on what is enabled for the organisation
    ScribeSf__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):

```

ScribeSf__DocumentAttachment__c attachment = new ScribeSf__DocumentAttachment__c(
    // General
    ScribeSf__Document__c = document.Id,
    Name = 'Sample Attachment Name',

    // Attachment Source
    ScribeSf__SourceType__c = 'From File', // available options: 'From File', 'Lightning File From Related Record', 'Visualforce PDF Template'
    ScribeSf__SourceRelatedRecordLightningFile__c = 'CONTENT_DOCUMENT_ID_FROM_RELATED_RECORD_ID',
    // has to be provided when
    // ScribeSf__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'
    ScriveSf__MergeWithMainFile__c = false, // by default 'false'
    ScriveSf__RequiredToReview__c = false // by default 'false'
);

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,
    ScriveSf__MergeWithMainFile__c = true,
    ScriveSf__RequiredToReview__c = true
);

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 = '...';

ScribeSf__Document__c document = new ScribeSf__Document__c(
    ScribeSf__Title__c = 'Sample Document Title',
    ScribeSf__DaysToSign__c = 7,

    ScribeSf__Opportunity__c = opportunityId,

    ScribeSf__SourceDocumentType__c = 'Lightning File From Related Record',
    ScribeSf__SourceDocumentRelatedRecordLightningFile__c = contentDocumentIdFromRelatedOpportunity
);

insert document;

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

Id userId = '...';

ScribeSf__DocumentParty__c party2 = new ScribeSf__DocumentParty__c(
    ScribeSf__Document__c = document.Id,

    ScribeSf__PartySource__c = 'Record',
    ScribeSf__Type__c = 'ScribeSf__User__c',
    ScribeSf__User__c = userId,

    ScribeSf__SigningOrder__c = 2,
    ScribeSf__SignatoryRole__c = 'signing_party'
);

insert party2;

Id visualforcePageId = '...';

ScribeSf__DocumentAttachment__c attachment = new ScribeSf__DocumentAttachment__c(
    ScribeSf__Document__c = document.Id,
    Name = 'Sample Attachment Name',

    ScribeSf__SourceType__c = 'Visualforce PDF Template',
    ScribeSf__SourceVisualforcePageId__c = visualforcePageId
);

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 = '...';

ScribeSf__Document__c document = new ScribeSf__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 = '...';

ScribeSf__DocumentParty__c party2 = new ScribeSf__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 = '...';

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

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

insert attachment;

```

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

```

Id visualforcePageId = '...';

ScribeSf__Document__c document = new ScribeSf__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 = '...';

ScribeSf__DocumentParty__c party2 = new ScribeSf__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
 -
- createDraftAsync(Id documentId)
 - *Parameter:* documentId (Salesforce Id of the Scrive Document),
 - *Output:* ScriveSf__Document__c record
 - **NOTE:** This is a solution when it's required to send a Scrive Document in the thread when some DML operations are already done and synchronous actions will cause errors.
- 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
- refreshDocumentAsync(Id documentId)

- *Parameter:* documentId (Salesforce Id of the Scrive Document),
 - *Output:* ScriveSf__Document__c record
 - **NOTE:** This is a solution when it's required to refresh a Scrive Document in the thread when some DML operations are already done and synchronous actions will cause errors.
- 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
- sendDocumentAsync(Id documentId)
 - *Parameter:* documentId (Salesforce Id of the Scrive Document),
 - *Output:* ScriveSf__Document__c record
 - **NOTE:** This is a solution when it's required to send a Scrive Document in the thread when some DML operations are already done and synchronous actions will cause errors.
- 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
- createLocalDocumentFromProcessTemplate(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 by this method is a Salesforce record that has no representation in Scrive service. The document will not be exchanged with Scrive during this method - it creates only SF records that can be exchanged with *createDraftAsync(documentId)* or *sendDocumentAsync(documentId)* methods from Scrive Global class.

- `createDocumentFromProcessTemplate(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 that has representation in Scrive service. The document will be sent out (in asynchronous process) if the Scrive Process Template has the “Send Document Immediately” checkbox checked or the draft document will be created on `scrive.com` (in asynchronous process) when the “Send Document Immediately” checkbox is unchecked on source Scrive Process Template.
- `ensureFreshAccessToken(Boolean enforceNewAccessToken)`
 - *Parameter:* `enforceNewAccessToken` (true or false: if true new access token should always be pulled, if false new access token should be pulled if current is not valid),
 - *Output:* void

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.

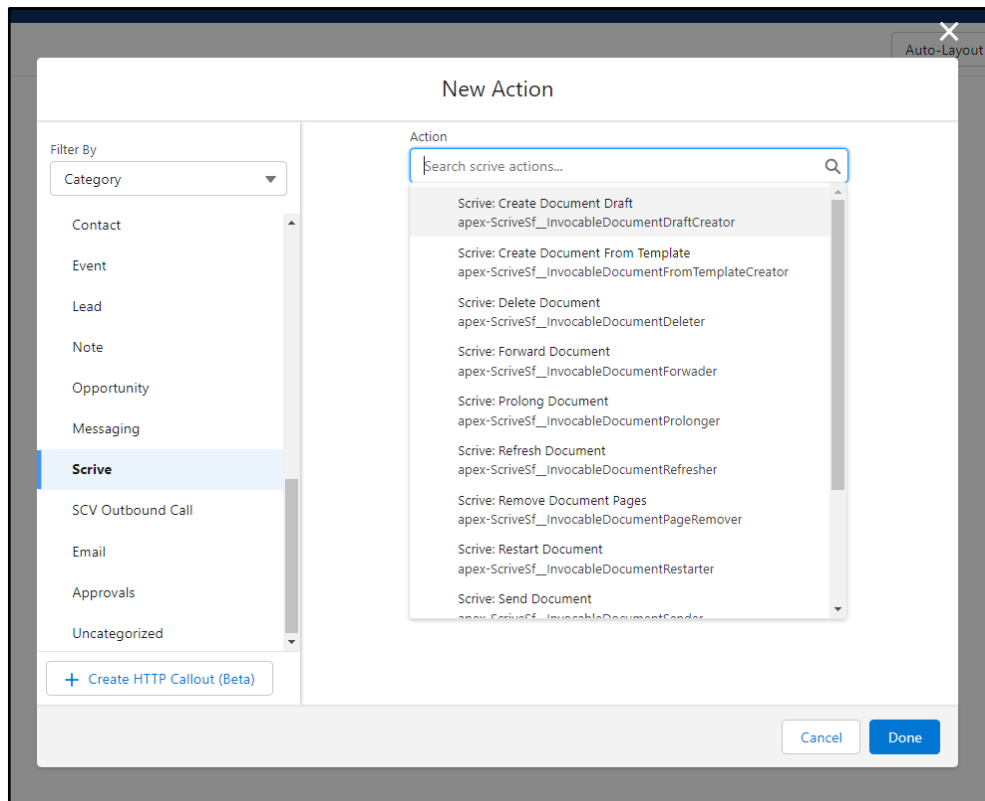
To import documents, the user needs to prepare Scrive Document Ids and run the following code in the Developer Console:

```
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 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 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:

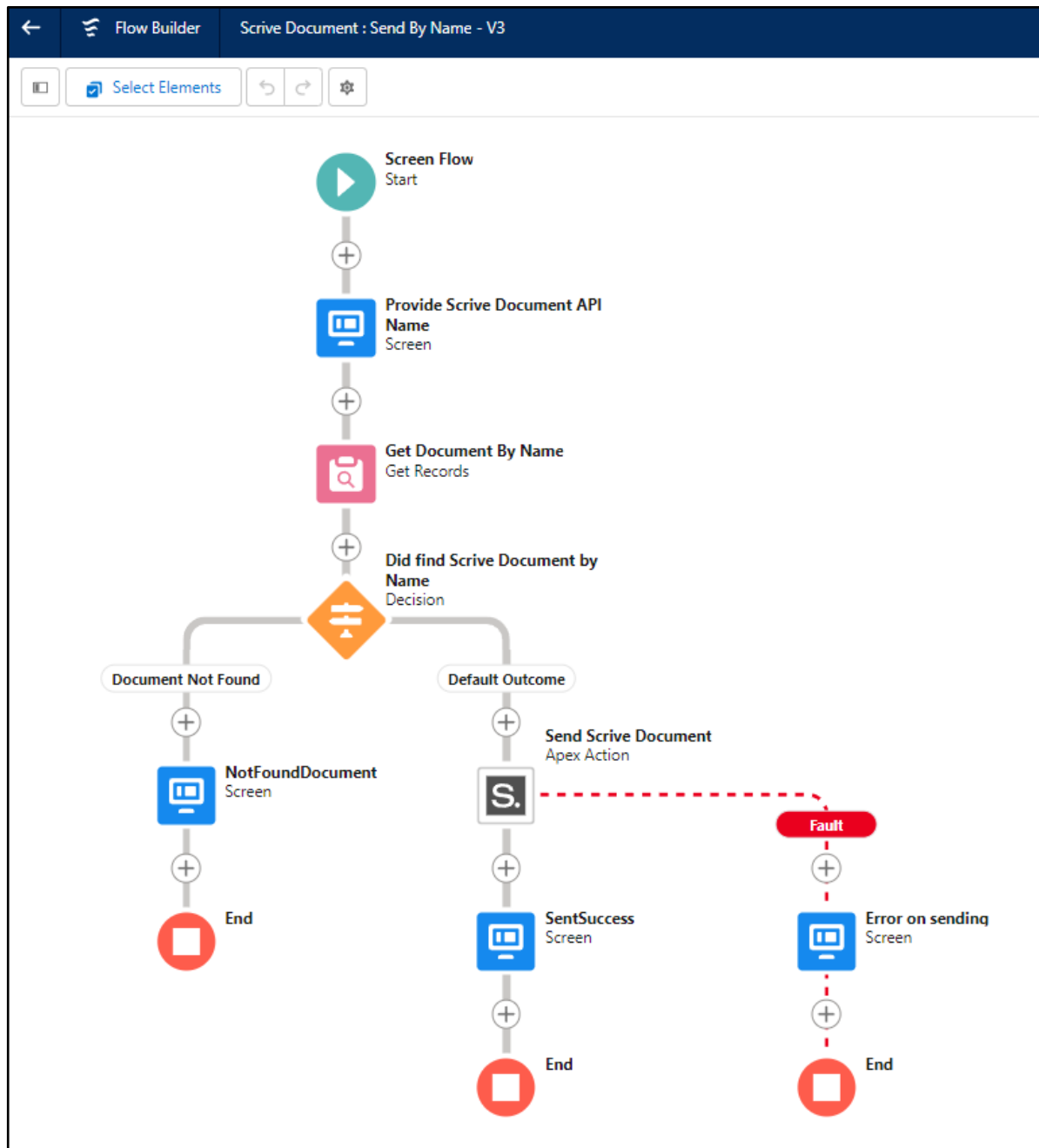
- Create/Update Draft Document,
- Create Document from Process Template and Source Record,
- Create Local Document from Process Template and Source Record,
- Delete Document,
- Forward Document to provided email,
- Prolong Document by Number of Days,
- Refresh Document,
- Remove Selected Pages From the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

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 screenshot displays a CRM interface for an opportunity named "Dickenson Mobile Generators". At the top, there is a header bar with a crown icon, the text "Opportunity Dickenson Mobile Generators", and buttons for "+ Follow", "Send Scrive Document" (highlighted with a red box), and "New Case". Below the header, a summary row shows: "Account Name: Dickenson plc", "Close Date: 13.01.2023", "Amount: 15 000,00 zł", and "Opportunity Owner: Marcin Opaliński". A sales pipeline is shown with stages: Qualificati..., Needs An..., Value Pro..., Id. Decisi..., Perceptio..., Proposal/..., and Negotia... The "Qualificati..." stage is currently active and highlighted in green. To the right of the pipeline is a button "Mark Stage as Complete". Below the pipeline, there are tabs for "Activity", "Details", and "Chatter". Under the "Activity" tab, there are four buttons: "New Task", "Log a Call", "New Event", and "Email". At the bottom of this section, it says "Filters: All time • All activities • All types" with a settings gear icon. On the right side, there is a "Related" section with a dropdown menu showing "Products (0)".

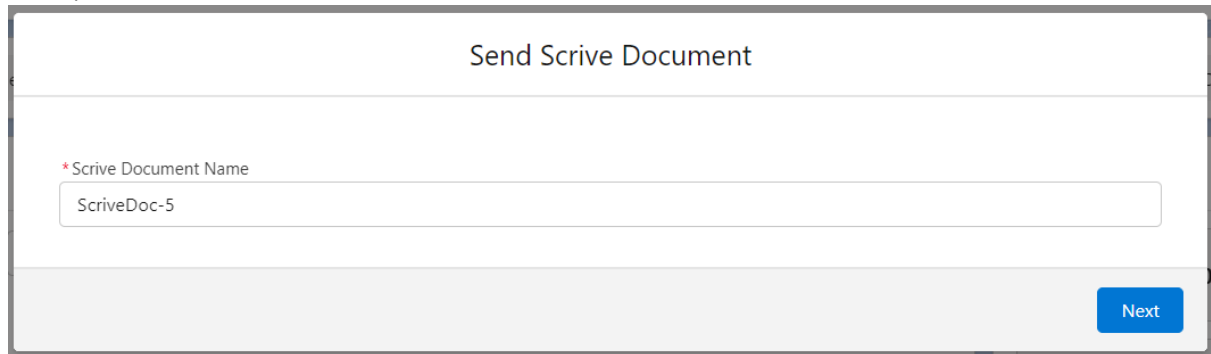
The Flow Diagram below has the first screen element that requires a user to provide Scrive Document Api Name. The next flow element ('Get Records') retrieves the document from the database. If the document with provided Api Name is not found in the database, the flow logic goes to the screen 'NotFoundDocument'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



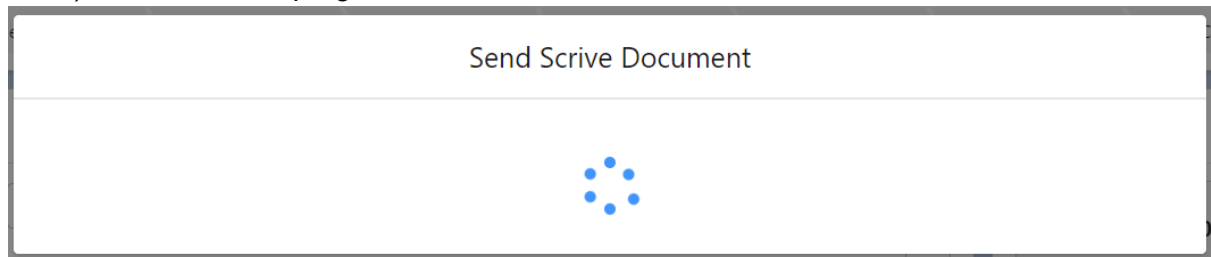
Send Scrive Document

* Scrive Document Name

ScriveDoc-5

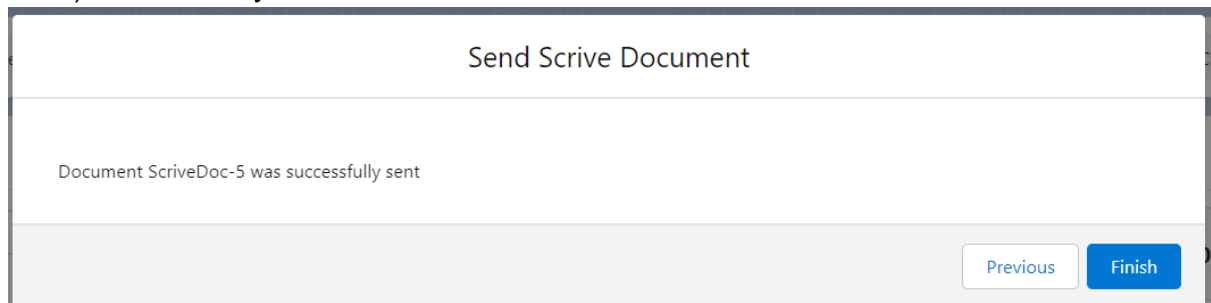
Next

2) Flow action in progress



Send Scrive Document

3) Successfully sent document with the flow

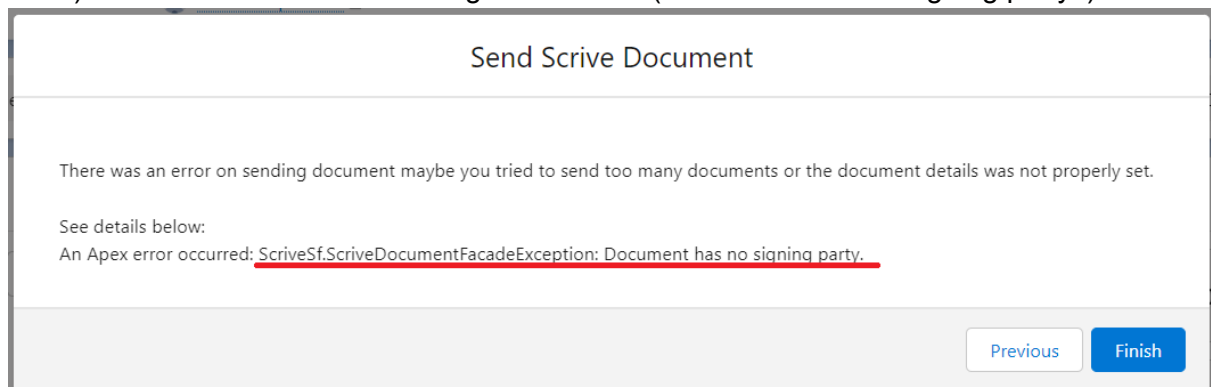


Send Scrive Document

Document ScriveDoc-5 was successfully sent

Previous Finish

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



Send Scrive Document

There was an error on sending document maybe you tried to send too many documents or the document details was not properly set.

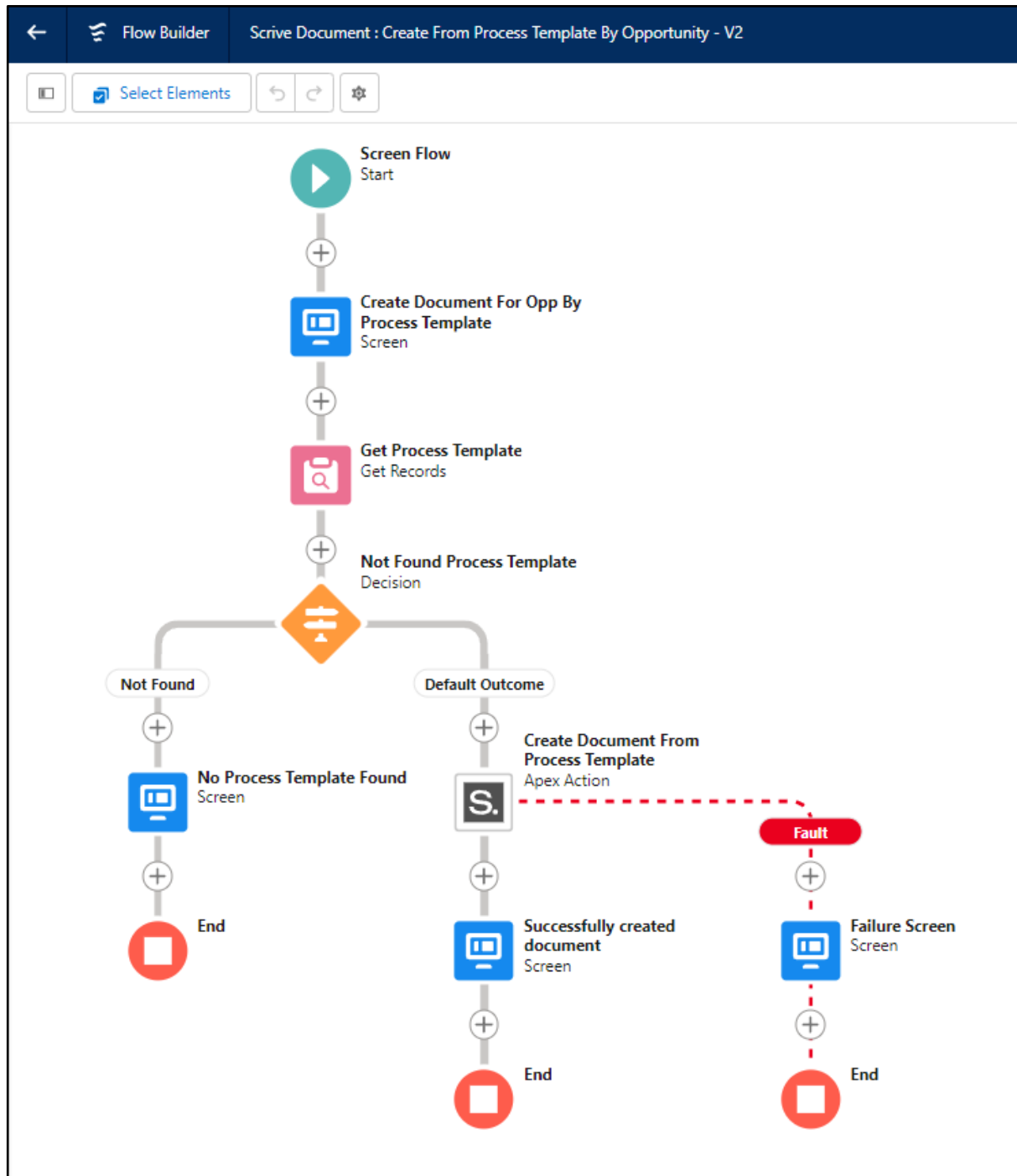
See details below:

An Apex error occurred: ScriveSf.ScriveDocumentFacadeException: Document has no signing party.

Previous Finish

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

ScribeDoc From Process

* Provide Process Template Unique Name

ScribeProcessTemplate_1685626231804

[Next](#)

2) Successfully created document

ScribeDoc From Process

The document was successfully created a060900000Wj1yDAAR

[Finish](#)

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

ScribeDoc 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 Scribe 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.

Scribe Process Template
Scribe Process Template

Details
Parties
Attachments
Access Controller

Template Party

Template Party

New Party

[Delete](#)

Party Source

Type

Merge

Record

Merge

ContactId

Details

Signing Order
1

Signatory Role
Signing Party

Hide Personal Number
☐

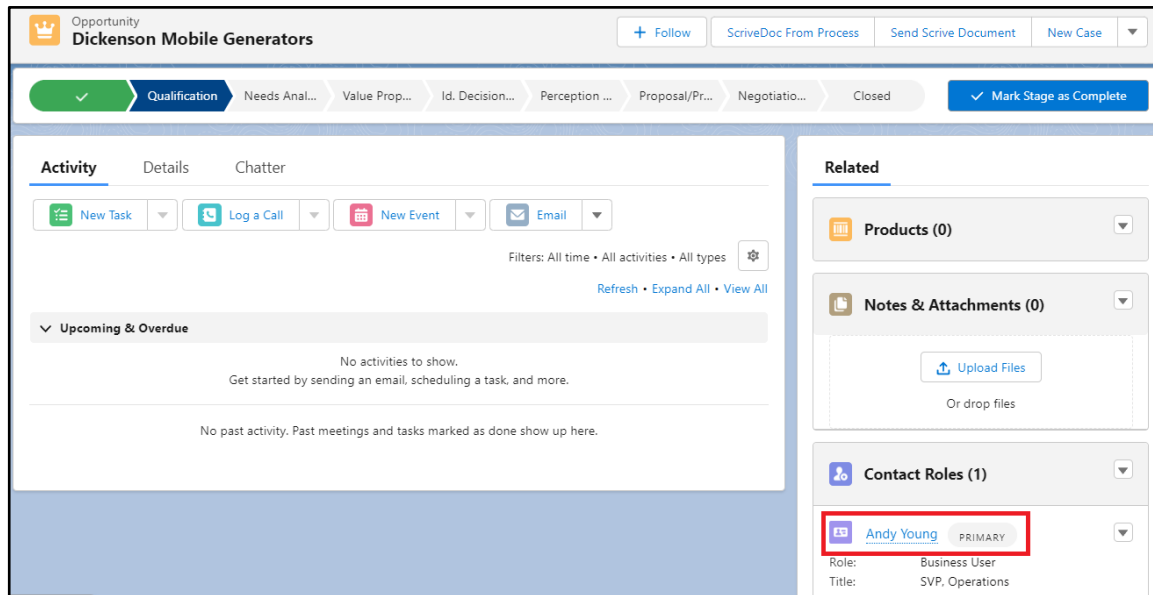
Source Object Type

Source Object Type
Opportunity

Main File

Visualforce PDF Template
ExampleScribePdfPage

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 Scribe invocable methods, could be combined into one Flow. This would allow a user to prepare a Scribe 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.

11.5 Visualforce PDF Template as source document

To use a Visualforce PDF as a source document template for [Scribe Document](#) or [Scribe Template](#) a Visualforce page can be created by going to Setup -> Visualforce Pages -> New.

Visualforce page can fetch data from the object that the template is used for (e.g. Opportunity). A more advanced page can also fetch data from records of a child object.

A simple Visualforce Page code:

```
<apex:page standardController="Opportunity" renderAs="pdf">
  <center>
    <h1>Welcome to Scribe!</h1>

    <p>
      Thank you,
      <b> <apex:outputText value="{!Opportunity.Name}" /> </b>, for using Scribe.
    </p>

    <p>WE WISH YOU A PLEASANT JOURNEY!</p>
  </center>
</apex:page>
```

The above example is set to work with Opportunity as the Scribe Document/Template source object record. It uses a standard controller `standardController="Opportunity"`

To include value from a field from Opportunity record, `{!Opportunity.FieldApiName}` syntax should be used.

To include value from a record related to the Opportunity, first a formula field on the Opportunity should be created and then the formula field should be used in the Visualforce Page. Example formula field on the Opportunity object:

Field API Name: AccountBillingCountry__c
Formula output type: Text
Formula value: Account.BillingCountry
Syntax for Visualforce page: `{!Opportunity.AccountBillingCountry__c}`

To include values from records from a child object of the Opportunity, a more advanced Visualforce Page needs to be built. The below example shows how to fetch *OpportunityLineItem* child records and display their data.

Visualforce Page example:

```
<apex:page standardController="Opportunity" extensions="ExampleScribePdfWithRelatedRecordsCtrl" renderAs="pdf">
  <h3>{!$Label.SampleVfPageHeader}</h3>
  <p>
    <b>{!$ObjectType.Opportunity.Label}</b> {!Opportunity.Name}<br />
    <b>{!$ObjectType.Opportunity.fields.StageName.Label}</b> {!Opportunity.StageName}<br />
    <b>{!$ObjectType.Opportunity.fields.Amount.Label}</b> {!Opportunity.Amount}
  </p>

  <apex:dataTable value="{!productLines}" var="productLine" id="productTable" border="1" align="center">
    <apex:facet name="header">{!$Label.SampleVfPageTableHeader}</apex:facet>
    <apex:column width="30%">
      <apex:facet name="header"><b>{!$ObjectType.Product2.fields.Name.Label}</b></apex:facet>
      <apex:outputText value="{!productLine.Product2.Name}" />
    </apex:column>
    <apex:column width="15%">
      <apex:facet name="header"><b>{!$ObjectType.OpportunityLineItem.fields.UnitPrice.Label}</b></apex:facet>
      <apex:outputText value="{!productLine.UnitPrice}" />
    </apex:column>
    <apex:column width="15%">
      <apex:facet name="header"><b>{!$ObjectType.OpportunityLineItem.fields.Quantity.Label}</b></apex:facet>
      <apex:outputText value="{0, number, 0}">
        <apex:param value="{!productLine.Quantity}" />
      </apex:outputText>
    </apex:column>
    <apex:column width="15%">
      <apex:facet name="header"><b>{!$ObjectType.OpportunityLineItem.fields.ListPrice.Label}</b></apex:facet>
      <apex:facet name="footer"><b>{!listPriceSum}</b></apex:facet>
      <apex:outputText value="{!productLine.ListPrice}" />
    </apex:column>
    <apex:column width="35%">
      <apex:facet name="header"><b>{!$ObjectType.OpportunityLineItem.fields.Description.Label}</b></apex:facet>
      <apex:outputText value="{!productLine.Description}" />
    </apex:column>
  </apex:dataTable>
</apex:page>
```

Page uses the standard Opportunity controller and a custom extension class *ExampleScribePdfWithRelatedRecordsCtrl*:

```

public with sharing class ExampleScrivePdfWithRelatedRecordsCtrl {
    public List<OpportunityLineItem> productLines {
        get {
            if (productLines == null) {
                productLines = getProductLinesRelatedToSourceOpp();
            }
            return productLines;
        }
        private set;
    }

    public Decimal listPriceSum {
        get {
            if (productLines == null) {
                return 0;
            }
            Decimal sum = 0;
            for (OpportunityLineItem productLine : productLines) {
                sum += productLine.ListPrice;
            }
            return sum;
        }
        private set;
    }

    public ExampleScrivePdfWithRelatedRecordsCtrl(ApexPages.StandardController stdController) {
    }

    public List<OpportunityLineItem> getProductLinesRelatedToSourceOpp() {
        return [
            SELECT Id, Name, Product2Id, Product2.Name, UnitPrice, Quantity, ListPrice, Description
            FROM OpportunityLineItem
            WHERE OpportunityId = :ApexPages.currentPage().getParameters().get('id')
            ORDER BY CreatedDate ASC
        ];
    }
}

```

ExampleScrivePdfWithRelatedRecordsCtrl fetches OpporutnityLineItem records related to the Opportunity record. Opportunity Id in this context is available by using:
ApexPages.currentPage().getParameters().get('id')

Child records are displayed in a datatable:

```
<apex:dataTable value="{!productLines}" var="productLine" id="productTable" border="1" align="center">
```

Labels used in the example (*{!\$Label.SampleVfPageHeader}*) are saved in Setup -> Custom Labels.

Example custom labels:

```

<?xml version="1.0" encoding="UTF-8" ?>
<CustomLabels xmlns="http://soap.sforce.com/2006/04/metadata">
    <labels>
        <fullName>SampleVfPageHeader</fullName>
        <categories>SampleVfPage</categories>
        <language>en_US</language>
        <protected>>false</protected>
        <shortDescription>
            >Sample dynamic PDF build based on Salesforce records as a Scrive main document.</shortDescription>
        <value>Sample dynamic PDF build based on Salesforce records as a Scrive main document.</value>
    </labels>

```

```
<labels>
  <fullName>SampleVfPageTableHeader</fullName>
  <categories>SampleVfPage</categories>
  <language>en_US</language>
  <protected>false</protected>
  <shortDescription>Products related to the opportunity</shortDescription>
  <value>Products related to the opportunity</value>
</labels>
</CustomLabels>
```

The above samples of Visualforce PDF Template are simple to present the basics of this standard Salesforce feature. Visualforce PDF Template is a flexible feature that can include advanced CSS styling and be much more complex to fulfil the most demanding requirements of building dynamic PDF documents based on existing SF records.

11.5.1 Indexing

All components that display a list of Visual Force pages that can be used as templates are based on a special index built during package installation. When you add, delete or modify Visual Force Pages, the index won't be updated automatically. Please make sure that after you add, modify (most importantly change "renderAs" parameter) or delete Visual Force Page you rebuild Visual Force Page Index. This can be done using admin panel [4.3.2 Rebuild Visual Force Pages Index](#) section of this document

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 Name' 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

Release 0.14, 06.2024

1. "Open Preview" option for Visualforce Page and Classic Document sources on a Main File component to preview a file if the definition allows it [SCRV-564].
2. Improvement of success toast messages handling across the application [SCRV-572].
3. Main File Fetcher logic improvement (synchronous limit eliminated) [SCRV-565].
4. User Provisioning logic - improvement for missing permission error handling [SCRV-555].
5. Field Mapping management available also for Scrive Admin (without Scrive User permission) users authorised via Scrive Authorization flow [SCRV-556].
6. Fix for signatory url stored in SF [SCRV-575].
7. Fix for OAuth2 Scrive Authorization process [SCRV-569].
8. Fix for dynamic labels on read only mode on party layout [SCRV-577].
9. Fix for the Users management panel [SCRV-589].

Release 0.15, 07.2024

1. Fix for the issue with self-registration on communities caused by Scrive application [SCRV-594].

Release 0.16, 09.2024

1. Introduction of Document Party status [SCRV-591].
2. Possibility to connect to Scrive Test Bed Environment [SCRV-527].

Release 1.18, 09.2024

1. Import Configuration From Scrive from Scrive Document level [SCRV-553].
2. Improvement for User deactivation handling [SCRV-595].
3. Fix for removal of Salesforce Files without Scrive Viewer/User permission [SCRV-619].
4. Disconnect All Users improvement [SCRV-611].

Release 1.19, 10.2024

1. Process Template Access Controller - *Manage Party Source* splitted to *Manage Party Source* and *Manage Party Source Definition* [SCRV-617].
2. Fix for Users Management Panel UI behaviour [SCRV-621].
3. Error handling improvement for actions on attachment tab [SCRV-623].
4. New asynchronous Scrive Global methods [SCRV-626].

Release 1.20, 11.2024

1. Improvement for error handling on callback [SCRV-632].

Release 1.21, 12.2024

1. Redesign of New Attachment UI [SCRV-622].
2. Document Party Status stored in a new picklist field (ScriveSf__DocumentParty__c.ScriveSf__PartyStatus__c) [SCRV-630]
3. Improved handling of a large number of users on the Scrive Admin Panel [SCRV-631].
4. Fix for Process Template Access Controller logic for "Record" and "Logged in User" Party Sources [SCRV-633].
5. Improved "Copy Signing Link Url" action handling [SCRV-634].
6. Improved Asynchronous job exception handling [SCRV-637].

Release 1.24, 01.2025

1. New invocable methods - Ensure Fresh Access Token and Create Local Document From Template [SCRV-660].
2. New Scrive Global method: ensureFreshAccessToken [SCRV-660]
3. Logs for Asynchronous failures [SCRV-658]

Release 1.25, 03.2025

1. Fix for Community: refresh Document - reload the page to get latest content [SCRV-640]
2. Fix for "Remove pages" flow [SCRV-647]
3. New functionality to remove empty party (Static, Record) on send action [SCRV-668, SCR-674]
4. Authorization upgrade for Asynchronous processing [SCRV-669]
5. Fix for Onfido Authentication on Scrive Document [SCRV-671]
6. Fix for document forwarding when missing permission on access controller [SCRV-672]
7. Fix for duplicate sent events on document refresh [SCRV-673]
8. Typo fix on Document Event when document withdrawn [SCRV-675]

Release 1.26, 04.2025

1. Optional Party marker on Scrive Document [SCRV-678]
2. Fix for Scrive Browser when multiple queries [SCRV-661]
3. New functionality to remove empty party (Static, Record) on send action [SCRV-668, SCR-674]

Release 1.27, 05.2025

1. Scrive App fix for tablet [SCRV-649]
2. New functionality to populate attachment name on upload [SCRV-681]
3. Handling duplicated document events on multiple async jobs [SCRV-690]

Release 1.28, 06.2025

1. Typo fix on Document Event when document timedout [SCRV-693]
2. Upgrade in main file refresh and deduplication [SCRV-694]

Release 1.29, 06.2025

1. Access to Named Credentials for Minimum Access profile [SCRV-696]
2. Enabling scrolling on Admin Panel when multiple Users [SCRV-692]
3. Fix for Document creation when Salesforce to Salesforce connection enabled [SCRV-697]
4. Update for button visibility to sign document when Link Only is selected for Delivery method after Salesforce Summer '25 release [SCRV-698]
5. Preventing attempts to create a duplicated link to a document under Related Record [SCRV-691]

Release 1.31, 07.2025

1. Fix for related record on Scrive Document when multiple lookups [SCRV-699]
2. Fix for Document actions when Salesforce to Salesforce connection enabled [SCRV-701]
3. Handling duplicate document events on document refresh from callback [SCRV-702]

Release 1.32, 07.2025

1. Fix for toast message when party is deleted [SCRV-695]
2. Fix for sending document when empty party (Optional Party) should be removed [SCRV-704]

Release 1.34, 09.2025

1. Introduced indexing VF pages [SCRV-688]
2. Added test cases to to increase Apex code coverage [SCRV-633]
3. Lightning web component rewritten to Lightning Modal [SCRV-653]
4. Components marked as OBSOLETE removed from package [SCRV-705]
5. Fix for Document Attachments marked as optional in SF [SCRV-707]

Release 1.35, 10.2025

1. Success message: Scrive Authorization section on Home Page [SCRV-710]
2. Disabling options to Allow Forwarding and Remove Empty Party on Send for "Logged in User" [SCRV-708]
3. User authorization - information for the Admin on Admin Panel [SCRV-711]

4. Fix for Import Scrive Process Template Configuration when Scrive Template updated [SCRV-713]
5. Fix for deactivation of users by a User who is not a Salesforce Admin [SCRV-714]
6. Toast message fix on Document Attachment creation [SCRV-715]
7. Fix for document refresh by Scrive Admin who is Non-Salesforce Admin [SCRV-717]

Release 1.36, 11.2025

1. Delete Action for Community – adjustment [SCRV-685]
2. ContentVersion deduplication when sending a document [SCRV-720]
3. CSS adjustment for Access Controller [SCRV-718]
4. Adjustment fetching Main File when ContentWorkspace exists [SCRV-725]
5. Fix for removal Attachment from Scrive Document and Process Template [SCRV-726]

Release 1.37, 01.2026

1. Lightning web component (Field Mapping) rewrote to Lightning Modal [SCRV-706]
2. Fix for close symbol in Field Mapping Popup [SCRV-721]
3. Date mapping fix: calendar year instead of ISO week-based year [SCRV-727]

Release 1.38, 04.2026

1. Field Mapping header adjustment [SCRV-731]
2. Buttons layout adjustment on mobile in Main File selector [SCRV-666]
3. Information on Admin Panel when callback does not work for User [SCRV-728]
4. Parties as table for Scrive Document and Scrive Document Template [SCRV-627]
5. Missing Main File warning [SCRV-735]
6. Components adjustment according to Salesforce new dark mode introduction [SCRV-724]
7. Fix for Field Mapping duplication of records with Global scope [SCRV-739]
8. Related SObject functionality improvement [SCRV-740]
9. Due Date support to document [SCRV-742]
10. Fix for missing spinner handler for Main File as Lightning File From Related Record [SCRV-743]

Release 1.39, 05.2026

1. OAuth URL on testbed [SCRV-748]
2. Always show save/cancel buttons on admin panel in edit mode [SCRV-736]
3. Warning before last Admin removal [SCRV-747]
4. Fix for Visualforce page preview [SCRV-753]
5. Table header on admin panel as sticky [SCRV-751]

6. Connected App update according to Salesforce Security Guidance [SCRV-752]

Release 1.40, 07.2026

1. Introduced sticky header for Scrive Browser [SCRV-754]
2. Fix for deleting Scrive Document containing attachments (cascade attachments deletion) [SCRV-758]
3. Handling iDIN authentication settings for Scrive Document Party [SCRV-764]