

DocuSign for Salesforce

Administrators Guide



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DocuSign for Salesforce Administration

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DocuSign for Salesforce Administration

Overview

The DocuSign for Salesforce managed package allows users to send a document for signatures from within Salesforce and guide signers in the signing process. If you are using the Salesforce Professional, Enterprise or Unlimited Editions, DocuSign for Salesforce from the AppExchange easily integrates into your Salesforce account.

DocuSign for Salesforce keeps track of the progress of deals from within Salesforce and uses your Salesforce tabs (Accounts, Contacts, Opportunities, Contracts, Cases or any other standard or custom tab in Salesforce) to address your documents.

How DocuSign for Salesforce Works with Salesforce Tabs

Each tab within Salesforce organizes and manages information about your customers. You can choose a record from a Salesforce tab to send a document to for signing.

DocuSign for Salesforce automatically transmits real time data (form data from any document sent in an envelope) and information about DocuSign envelopes directly into your Salesforce account. This data includes status information on a DocuSign transaction, envelope information such as subject and envelope fields, recipient name, and company.

If you want more information about how the DocuSign Service works, please see the *DocuSign Service User Guide* on the DocuSign Support website:

http://www.docusign.com/support/sender_doc.php

DocuSign for Salesforce Installation and Configuration Process

Install the DocuSign for Salesforce application from the AppExchange. DocuSign for Salesforce installs all the preset mappings between envelope fields in DocuSign and tabs in Salesforce, loading the default configuration. All mappings are pre-set to drive data updates, report tabs, and dashboards which are installed into Salesforce records. With the DocuSign for Salesforce application, your information can be related to any standard Salesforce tab including Lead, Contact, Account, Opportunity, Case, or Contract, so it works the way you do.

The *DocuSign for Salesforce Administrators Guide* describes how to install and configure DocuSign for Salesforce to send documents for signatures to records in your Salesforce tabs.

Installing and configuring DocuSign for Salesforce up takes less than thirty minutes for a Salesforce administrator. The steps are outlined in this section and discussed in detail in the rest of this guide:

- 1 Download and install DocuSign for Salesforce from the Salesforce AppExchange.
- 2 Make sure you can connect to the DocuSign Service.
- 3 Link your existing DocuSign Service account to DocuSign for Salesforce or, if you do not have a DocuSign Service account, create one and link it to your DocuSign for Salesforce account.
- 4 Configure your Salesforce tabs to send documents to be DocuSigned.
- 5 Add users to DocuSign for Salesforce and enable them to send documents to be DocuSigned.

Installing DocuSign for Salesforce from the Salesforce AppExchange

DocuSign for Salesforce is a managed package. If you have questions about downloading AppExchange applications, see the salesforce.com web site for assistance:


<https://na2.salesforce.com/help/doc/en/sf.pdf>

- 1 Download the DocuSign for Salesforce application from the Salesforce AppExchange.
- 2 Open the DocuSign for Salesforce managed package.

The screenshot shows a dialog box titled "Package Upgrade Details". It contains two sections: "Package Upgrade Details" and "Installed Version Information". The "Package Upgrade Details" section lists the following information: Package Name: DocuSign For Salesforce, Version Name: RC17, Version Number: 1.61, and Publisher: DocuSign, Inc. The "Installed Version Information" section lists the following information: Package Name: DocuSign For Salesforce, Version Name: RC14, Version Number: 1.4, and Publisher: DocuSign, Inc. At the bottom right of the dialog box, there are two buttons: "Continue" and "Cancel". A green arrow points to the "Continue" button.

Package Upgrade Details	
Package Name	DocuSign For Salesforce
Version Name	RC17
Version Number	1.61
Publisher	DocuSign, Inc.

Installed Version Information	
Package Name	DocuSign For Salesforce
Version Name	RC14
Version Number	1.4
Publisher	DocuSign, Inc.



- 3 Click the **Continue** button.

The **Package Installer DocuSign for Salesforce** page appears. This page shows you the custom objects that are installed with DocuSign for Salesforce.

Package Installer
DocuSign For Salesforce

Help for this Page ?

Step 1. Approve Package API Access

Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaigns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Price Books	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Solutions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next

Cancel

- 4 Click the **Next** button.

The **Choose security level** page appears.

Step 2. Choose security level Step 2 of 3

Select security settings

<input type="radio"/> Admin access only	Best for limited deployments. Users with your profile will have full access.
<input checked="" type="radio"/> Grant access to all users	All user profiles will have full access
<input type="radio"/> Select security settings	Recommended for most packages

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

- 5 Select the **Grant access to all users** radio button.

- 6 Click the **Next** button.

The **Install Package** page appears.

Step 3. Install Package Step 3 of 3

The package is ready to be installed. Click Install to continue.

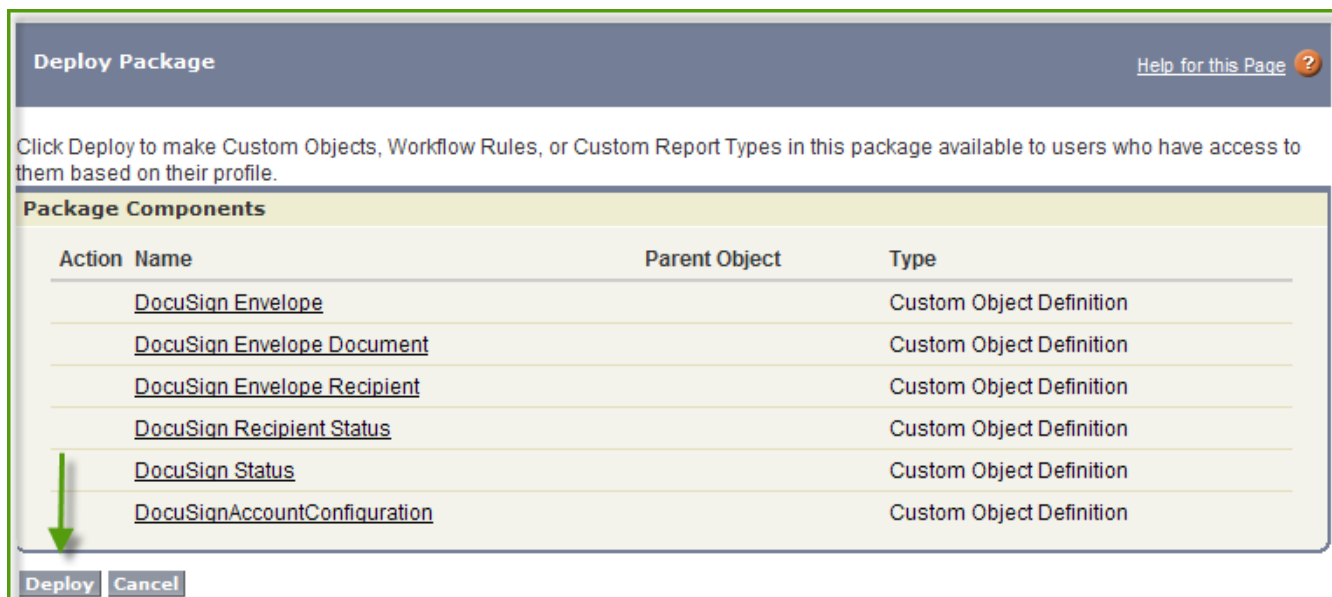
☒ Ignore Apex test failures that may cause the installed application not to function properly.

[Previous](#) [Install](#) [Cancel](#)

- 7 Select the **Ignore Apex test failures** box.

- 8 Click the **Install** button.

When the installation completes, the **Deploy Package** page appears.



Deploy Package [Help for this Page](#)

Click Deploy to make Custom Objects, Workflow Rules, or Custom Report Types in this package available to users who have access to them based on their profile.

Package Components

Action	Name	Parent Object	Type
	DocuSign Envelope		Custom Object Definition
	DocuSign Envelope Document		Custom Object Definition
	DocuSign Envelope Recipient		Custom Object Definition
	DocuSign Recipient Status		Custom Object Definition
	DocuSign Status		Custom Object Definition
	DocuSignAccountConfiguration		Custom Object Definition

Deploy **Cancel**

- 9 From the **Deploy Package** page, click the **Deploy** button.

The **Package Details** page appears.



Package Details
DocuSign For Salesforce (Managed) [Help for this Page](#)

[< Back to List: Installed Package](#)

Installed Package Detail **Uninstall** **Deploy** **Show Dependencies**

Package Name	DocuSign For Salesforce	Version Number	1.61
Version Name	RC17	First Installed Version Number	1.61
Publisher	DocuSign, Inc.	Package Type	Managed
Description		API Access	Unrestricted (Enable Restrictions)
Installed By	Test User1 , 11/10/2009 1:54 PM	Modified By	Test User1 , 11/10/2009 1:54 PM

Uninstall **Deploy** **Show Dependencies**

Package Components

From this page you can:

- Uninstall DocuSign for Salesforce
- Scroll down the page and see the DocuSign for Salesforce Components.

The DocuSign for Salesforce installation is complete. However, you must go to this guide's next section called *Configuring DocuSign for Salesforce* in order to set up DocuSign for Salesforce to work with DocuSign.

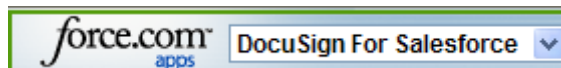
Configuring DocuSign for Salesforce

Your DocuSign for Salesforce application has been installed, but it has not yet been set up to work with DocuSign. From the **DocuSign Admin** tab in DocuSign for Salesforce, start the set up process to:

- Verify the you can connect to the DocuSign Service
- Link to an existing DocuSign Service account
- Or, set up a new DocuSign Service account, if you do not have one
- Configure the Salesforce tabs with DocuSign sending capability
- Add new users to DocuSign for Salesforce users and enable them to send documents to be DocuSigned.

Verifying a Connection to the DocuSign Service

- 1 After you have installed DocuSign for Salesforce, go to the **force.com apps** drop list and select **DocuSign for Salesforce**.

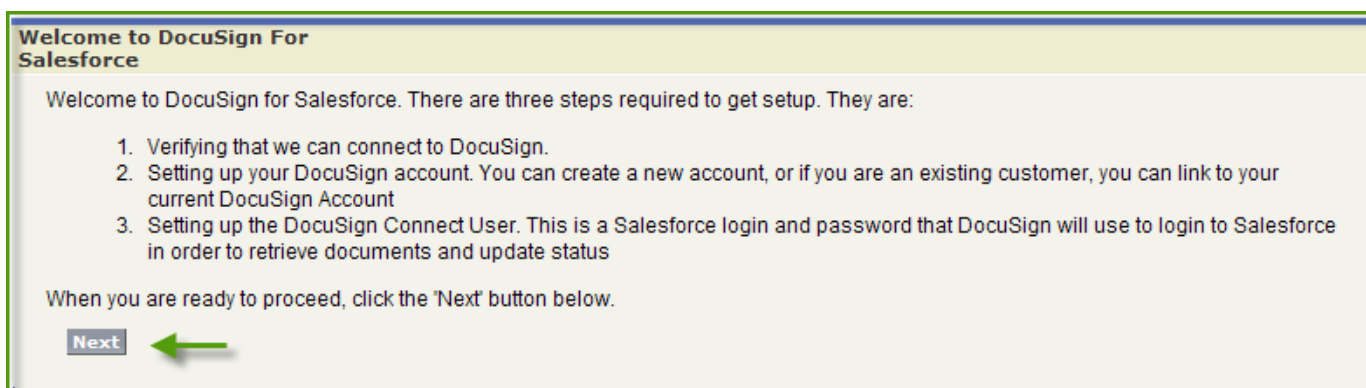


The DocuSign for Salesforce application appears with the **Admin** tab showing the **Setup Your Account** page.

- 2 Click the **Setup** button.

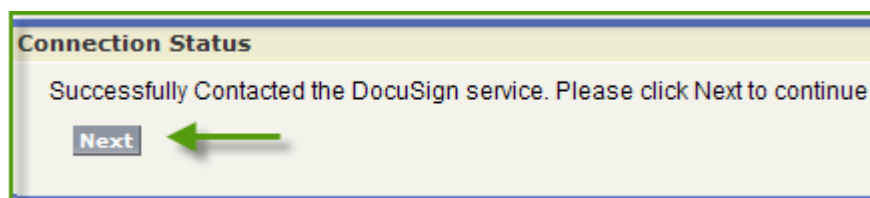


The **Welcome to DocuSign for Salesforce** page appears.



- 3 Click the **Next** button.

If you can connect to the DocuSign Service, the **Connection Status** page appears showing that your connection was successful.



- 4 Click the **Next** button.

The **Setup Your DocuSign Account** page appears. If you have a DocuSign Service account, go to the section of this guide entitled “Linking Your Salesforce Account to an Existing DocuSign Account.” If you do not have a DocuSign Service account, go to the section of this guide entitled “Creating a DocuSign Service Account and Linking It to a Salesforce Account.”

Linking Your Salesforce Account to an Existing DocuSign Service Account

After you verify that you can connect to the DocuSign Service, and if you have a DocuSign Service account, you must link your DocuSign for Salesforce account to the DocuSign Service account.

- 1 From the **Setup Your DocuSign Account** page, click the **I already have a DocuSign Account that I will use** button.

Setup Your DocuSign Account

Please fill out the form below and click the 'Create My Account' button to setup your new DocuSign account. When you do this, we will create an account for you at DocuSign, and then store the DocuSign Username and password in your Salesforce account. (Note: Your DocuSign password is encrypted before being stored)

If you already have an account with DocuSign, and you wish to use it instead of creating a new account, click the 'Use My Existing DocuSign Account' button. This will allow you to enter the email address and password for your existing DocuSign account.

I already have a DocuSign Account that I will use

The **Authenticate your DocuSign Account** page appears.

Authenticate your DocuSign Account

Please enter the email address and password for your existing DocuSign account, and then click the 'Link Account' button. When you do this, we will verify the email and password with DocuSign, and then store the DocuSign Username and password in your Salesforce account. (Note: Your DocuSign password is encrypted before being stored)

If you wish to Create a new Account with DocuSign instead, please click on the 'I want to Create a new DocuSign Account' button.

I want to Create a new DocuSign Account

DocuSign Email Address: dsfsfinaltest@gmail.co

DocuSign Password:

Link Account **Cancel**

- 2 If you have a DocuSign email address and password, enter it and click the **Link Account** button.

If you have a DocuSign account, DocuSign for Salesforce confirms the DocuSign email address and password and stores them in your Salesforce account.

- 3 Go to the section of this guide called “Configuring Salesforce Tabs to Allow Users to Send Documents to Salesforce Records.”

Creating a DocuSign Service Account and Linking It to Your Salesforce Account

After you verify that you can connect to the DocuSign Service, and if you do not have a DocuSign Service account, you must create a DocuSign Service account and link it to your DocuSign for Salesforce account. Use the **Setup Your DocuSign Account** page to create your DocuSign Service account and link it to your DocuSign for Salesforce account.

Setup Your DocuSign Account

Please fill out the form below and click the 'Create My Account' button to setup your new DocuSign account. When you do this, we will create an account for you at DocuSign, and then store the DocuSign Username and password in your Salesforce account. (Note: Your DocuSign password is encrypted before being stored)

If you already have an account with DocuSign, and you wish to use it instead of creating a new account, click the 'Use My Existing DocuSign Account' button. This will allow you to enter the email address and password for your existing DocuSign account.

☐ I already have a DocuSign Account that I will use

Account Information

Your Name (as you sign it)	<input type="text" value="Test User1"/>	Email Address	<input type="text" value="dsfsffinaltest1@gmail.com"/>
Password	<input type="password" value="....."/>	Confirm Password	<input type="password" value="....."/>

Password Rules:

1. Must be at least 6 characters long.
2. Must **not** contain the characters < or > .

Forgotten Password Question	<input type="text" value="What is your mother's maiden name?"/>	Forgotten Password Answer	<input type="text" value="docusign"/>
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Personal Information

Title	<input type="text"/>
First Name	<input type="text" value="Test"/>
Middle Name	<input type="text"/>
Last Name	<input type="text" value="User1"/>
Suffix	<input type="text"/>

Address

Company Name	<input type="text" value="DocuSign, Inc."/>
Address Line 1	<input type="text" value="414"/>
Address Line 2	<input type="text"/>
City	<input type="text" value="apex"/>
State	<input type="text" value="nc"/>
Zip	<input type="text" value="27502"/>
Phone Number	<input type="text"/>
Fax	<input type="text"/>

Confirm

☒ I agree to the [DocuSign Terms and Conditions](http://www.docusign.com/terms_and_conditions.php) (available at http://www.docusign.com/terms_and_conditions.php).

- 1 In the **Account Information** section:
 - Enter and confirm your Salesforce password.
 - Select a password question and enter a password answer.
- 2 In the **Address** section, enter your address, city, state, and zip code.

- 3 In the **Confirm** section, click the **I agree to the DocuSign Terms and Conditions** box.
- 4 Click the **Create My Account** button.

The **Setup Your DocuSign Connect User** page appears. Use this page to select your Salesforce user's login credentials to create a DocuSign account.



NOTE: Make sure that you have sufficient administrative permissions to update and modify data in the DocuSign Service.

Setup Your DocuSign Connect User

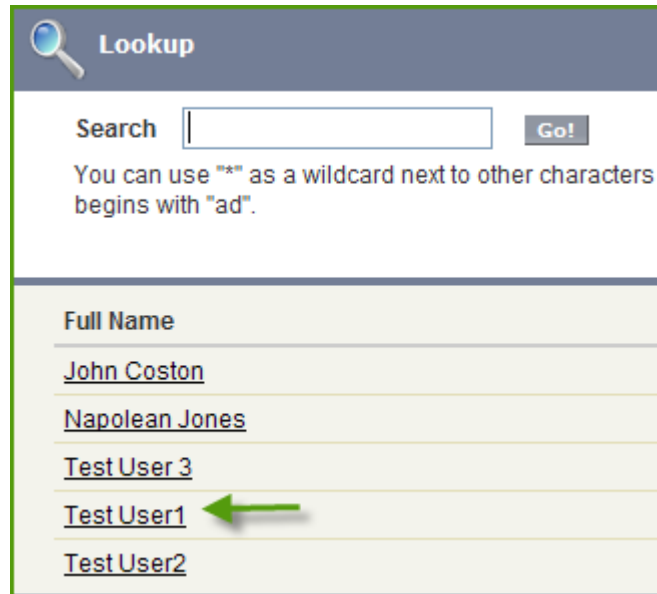
DocuSign Connect is the technology that will push status updates from the DocuSign service to your Salesforce organization. In order to do this, we will store a Salesforce username and password at DocuSign (Note: DocuSign encrypts this information when it is stored). For best results, you should use a user account that is dedicated to this purpose. The Salesforce User that you enter here must have sufficient permissions to update and modify data in your organization. The specific data that will be modified can be configured using your DocuSign Account Administration webpage, which is accessible from your DocuSign Member Console. The Member Console can be accessed [here](#).

Also, note that we will be connecting to Salesforce from the DocuSign data center, so you will need to either provide the security token with the password below, or add the DocuSign datacenter to your Trusted Sites network.

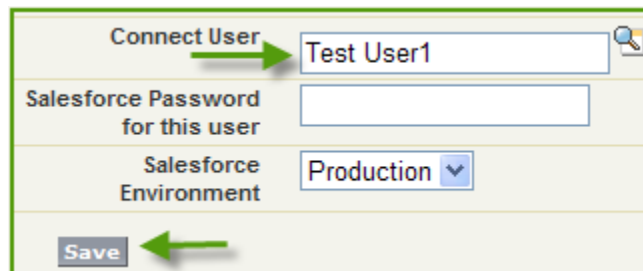
Connect User	<input type="text"/>
Salesforce Password for this user	<input type="password"/>
Salesforce Environment	Production ▼

Save

- 5 Click the magnifying glass next to the **Connect User** field.
The **Look Up** page appears.



- 6 Search for and select your Salesforce name.
The **Setup Your DocuSign Connect User** page reappears with your name added to the **Connect User** field.




- 7 Enter your Salesforce password.
From the **Salesforce Environment** drop list, select the **Production** or **Sandbox** option.
- 8 Click the **Save** button.
The **Setup Complete** page appears. Your DocuSign account is now created and configured with your Salesforce login credentials.

- 9 Click the **DocuSign Admin** button to go to the **DocuSign Admin** tab to enable DocuSign for Salesforce for additional members of your Salesforce organization.

For more information on how enable DocuSign for Salesforce for additional Salesforce users, see the section of this guide entitled “Adding Users to DocuSign for Salesforce.”

Setup Complete

Your DocuSign account is now configured. Your account information is displayed below, and you can view this information at any time by clicking on the 'DocuSign Admin' tab on the 'DocuSign for Salesforce' application. If you wish to enable DocuSign for additional members of your Salesforce organization, you can go the the 'DocuSign Admin' tab, and use the DocuSign Member Manager to select the users and enable their DocuSign accounts. Thanks for using DocuSign!

DocuSign Admin 

DocuSign Account Information			
Plan Name	DocuSign Free Trial	Plan ID	a0f3b415-37c5-47fd-a190-58cf5768f3d2
Plan Start Date	11/12/2009	Plan End Date	Auto-Renewal
Current Billing Period Start Date	11/12/2009	Current Billing Period End Date	12/12/2009
Current Billing Period Envelopes Sent	0	Current Billing Period Envelope Allowed	
Connect User	dsfsfinaltest1@gmail.com		

- 10 For more information on how to configure Salesforce tabs with the Send to DocuSign feature, go to the section of this guide called “Configuring Salesforce Tabs with the Send with DocuSign Button.”

Configuring Salesforce Tabs with the Send with DocuSign Button

As part of the out-of-the-box DocuSign for Salesforce installation, you can configure the following Salesforce tabs with the **Send with DocuSign** button:

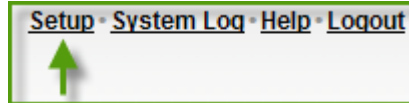
- Leads
- Contacts
- Accounts
- Opportunities
- Cases

The **Send with DocuSign** button allows Salesforce users to send documents to be DocuSigned to records in these Salesforce tabs.

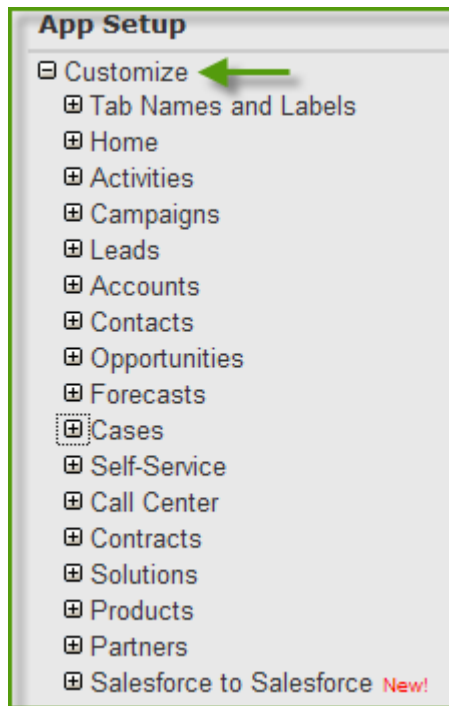


NOTE: The following example shows how you can add the **Send with DocuSign** button to work with a Salesforce **Opportunities** record. You can use the **Send with DocuSign** button on records on other Salesforce tabs in the same way, starting with choosing the tab, then choosing the **Page Layout** link, then following the steps below in this example.

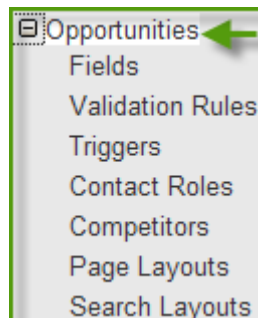
- 1 From DocuSign for Salesforce, click the **Setup** link at the top of the page.



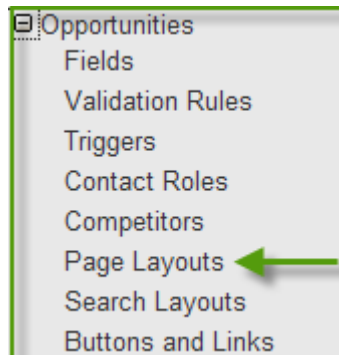
In the left column, under **App Setup**, click the **Customize** link.



- 2 Click the **Opportunities** link.

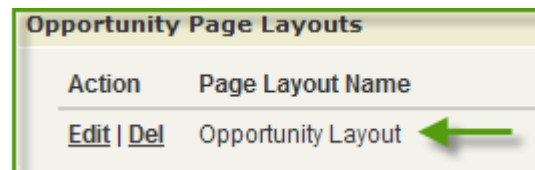


- 3 Under the **Opportunities** link, click the **Page Layouts** link.

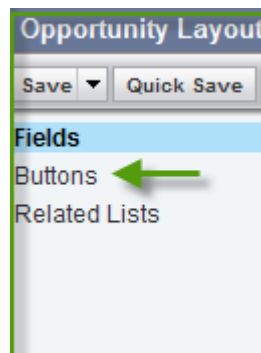


The **Opportunity Page Layout** page appears.

- 4 Click the **Edit** button associated with the **Page Layout Name** you want to edit.

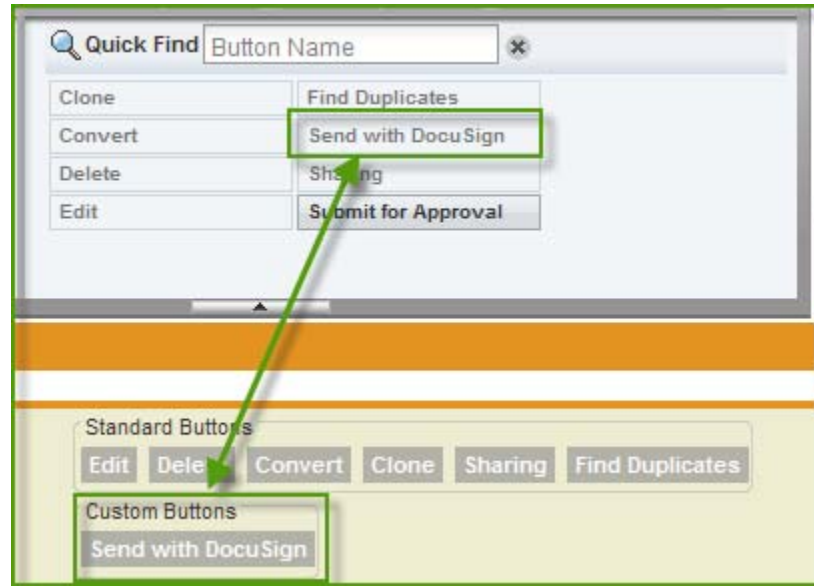


- 5 Click **Buttons** in the **Opportunity Layout** menu.

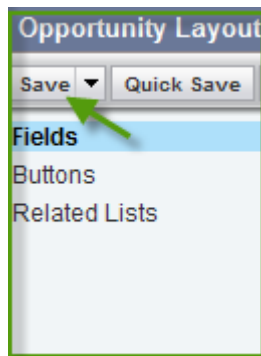


- 6 From the **Opportunity Layout** menu, drag the **Send with DocuSign** button to the **Custom Buttons** box.

Alternatively, if you want to remove this button from the **Opportunities Layout** page, you can just drag it from the **Custom Buttons** box back to its original location in the **Opportunity Layout** menu.

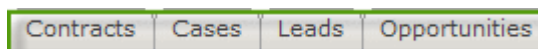


- 7 Click the **Save** button in the **Opportunity Layout** menu to save your edits to the page.

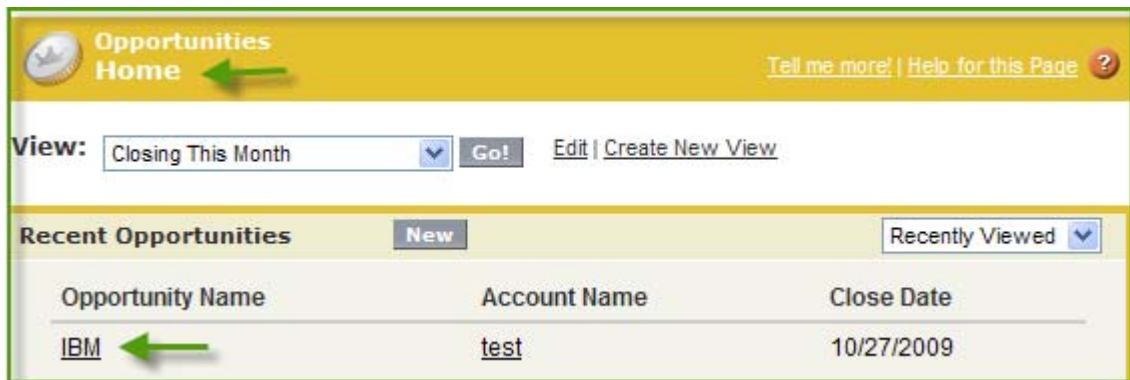


DocuSign for Salesforce updates the **Opportunities** tab by adding the **Send with DocuSign** button to the **Opportunities Detail** page.

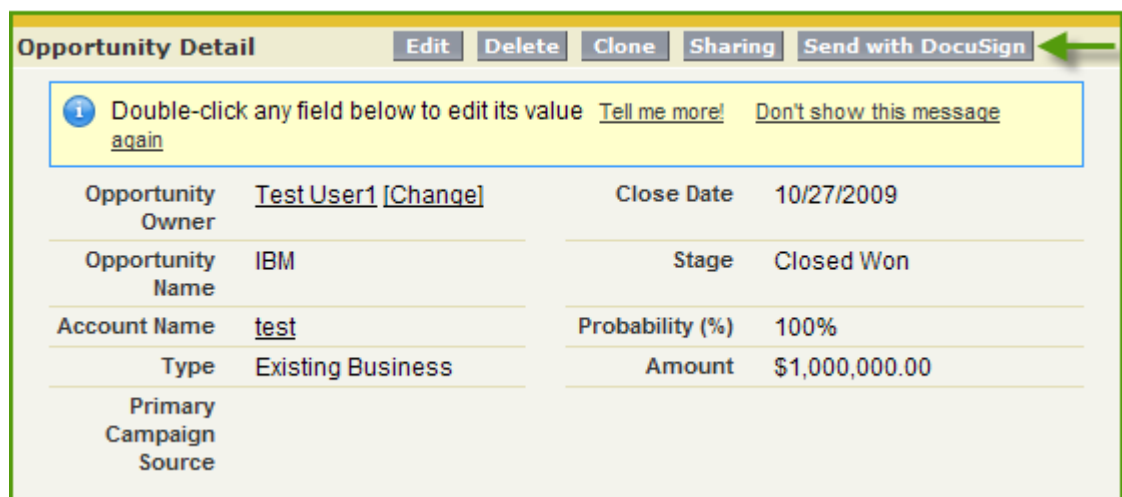
- 8 Click the **Opportunities** tab at the top of DocuSign for Salesforce.



- 9 From the **Opportunities Home** section, click an **Opportunity** to view the **Send with DocuSign** button on the opportunity.



From the **Opportunity Detail** page, you can now use the **Send with DocuSign** button to send a document to this opportunity.



Adding Users to DocuSign for Salesforce

From DocuSign for Salesforce, use the **DocuSign Admin** tab to select Salesforce users and enable them to send documents to be DocuSigned.

- 1 Click the **DocuSign Admin** tab.

The **DocuSign Administration** page appears.

DocuSign Administration

DocuSign Account Information

Account Name	DocuSign, Inc.	Account ID	9fe699ec-f6ee-463b-9c20-da3f4 added379d
Plan Name	DocuSign Free Trial	Plan ID	0aa059f6-233b-4988-95bd-a2b0c4bf02be
Plan Start Date	11/12/2009	Plan End Date	Auto-Renewal
Current Billing Period Start Date	11/12/2009	Current Billing Period End Date	12/12/2009
Connect User	dsfsfinaltest@gmail.com		

Your DocuSign User information


User already configured with a DocuSign UserId and Password

DocuSign UserId	b3d16246-da44-438f-b0c4-e1583dcdc019
Password	*****

[Edit DocuSign Password](#)

DocuSign Member Management

Select A User


User 

[Edit Selected User](#)

- 2 From the **DocuSign Member Management** section, click the magnifying glass next to the **User** field.

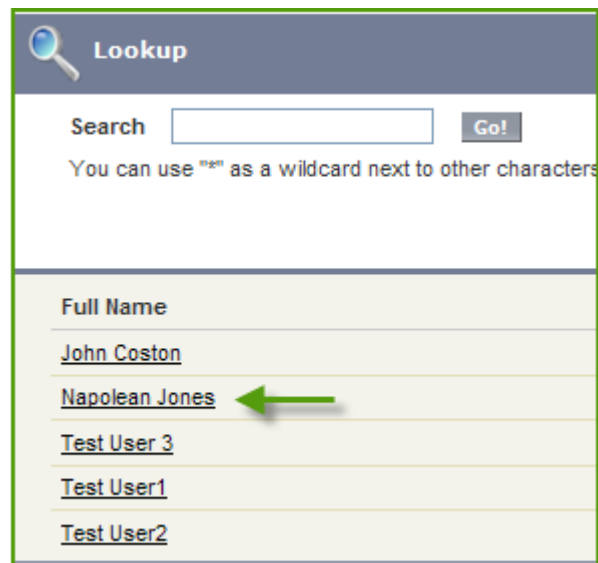
DocuSign Member Management

Select A User

User 

[Edit Selected User](#)

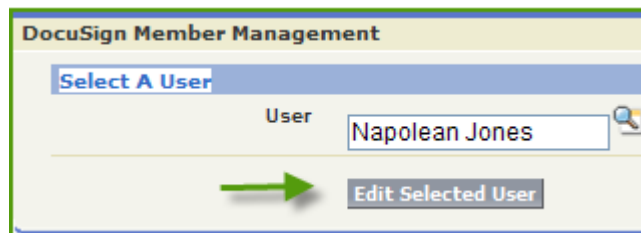
The **Lookup** page appears.



The screenshot shows the Salesforce 'Lookup' interface. At the top, there is a search bar with the text 'Search' and a 'Go!' button. Below the search bar, a message states: 'You can use "*" as a wildcard next to other characters'. A list of search results is displayed below, with the following entries: 'Full Name', 'John Coston', 'Napolean Jones', 'Test User 3', 'Test User1', and 'Test User2'. A green arrow points to the 'Napolean Jones' entry, indicating it is the selected user.

- 3 Search for and select a Salesforce user.

The user you selected appears in the **User** field on the **DocuSign Administration** page.

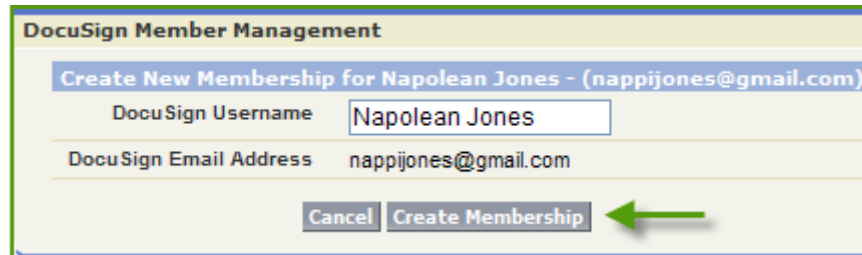


The screenshot shows the 'DocuSign Member Management' section. It features a 'Select A User' button. Below this, the 'User' field displays 'Napolean Jones'. A green arrow points to the 'Edit Selected User' button, indicating the next step in the process.

- 4 Click the **Edit Selected User** button.

The **DocuSign Member Management** section now allows you to create a DocuSign account for this Salesforce user.

- 5 Click the **Create Membership** button.



The screenshot shows the 'DocuSign Member Management' interface. At the top, it says 'Create New Membership for Napoleon Jones - (nappijones@gmail.com)'. Below this, there are two input fields: 'DocuSign Username' with the value 'Napoleon Jones' and 'DocuSign Email Address' with the value 'nappijones@gmail.com'. At the bottom of the form, there are two buttons: 'Cancel' and 'Create Membership'. A green arrow points to the 'Create Membership' button.

A page appears showing this Salesforce user now has a new DocuSign account and the DocuSign account is linked to this user's Salesforce account. DocuSign sends an email to this Salesforce user's email with instructions on how to login to the DocuSign Service.



The screenshot shows the 'DocuSign Member Management' interface. At the top, it says 'DocuSign Member Management'. Below this, there is a section titled 'Action Status'. The text in this section reads: 'A new DocuSign Membership was created and the User was successfully linked to it. Once the activation has been completed the User must enter their DocuSign password there.' At the bottom right of the page, there is a 'Done' button. A green arrow points to the 'Done' button.

- 6 Click the **Done** button.
 - 7 Make sure your Salesforce users open the email from the DocuSign Service and follow the instructions in it to login to the DocuSign Service.
- Once they have done so, they can send documents to be DocuSigned from either the DocuSign Service or from DocuSign for Salesforce.

For More Information

For more information, please visit the DocuSign web site at www.docusign.com, or visit the DocuSign forums. If you would like information about the DocuSign For Salesforce, and the Salesforce controls it installs, please see the following guides:

- *DocuSign for Salesforce Sending a Document for Guided Signing QuickStart Guide*
- *DocuSign for Salesforce User Guide*
- *DocuSign for Salesforce Document Tagging QuickStart Guide*

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