DocuSign for Salesforce

Administrators Guide

DocuSign
The fastest way to get a signature.®

Contents

DocuSign for Salesforce Administration

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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 they 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:

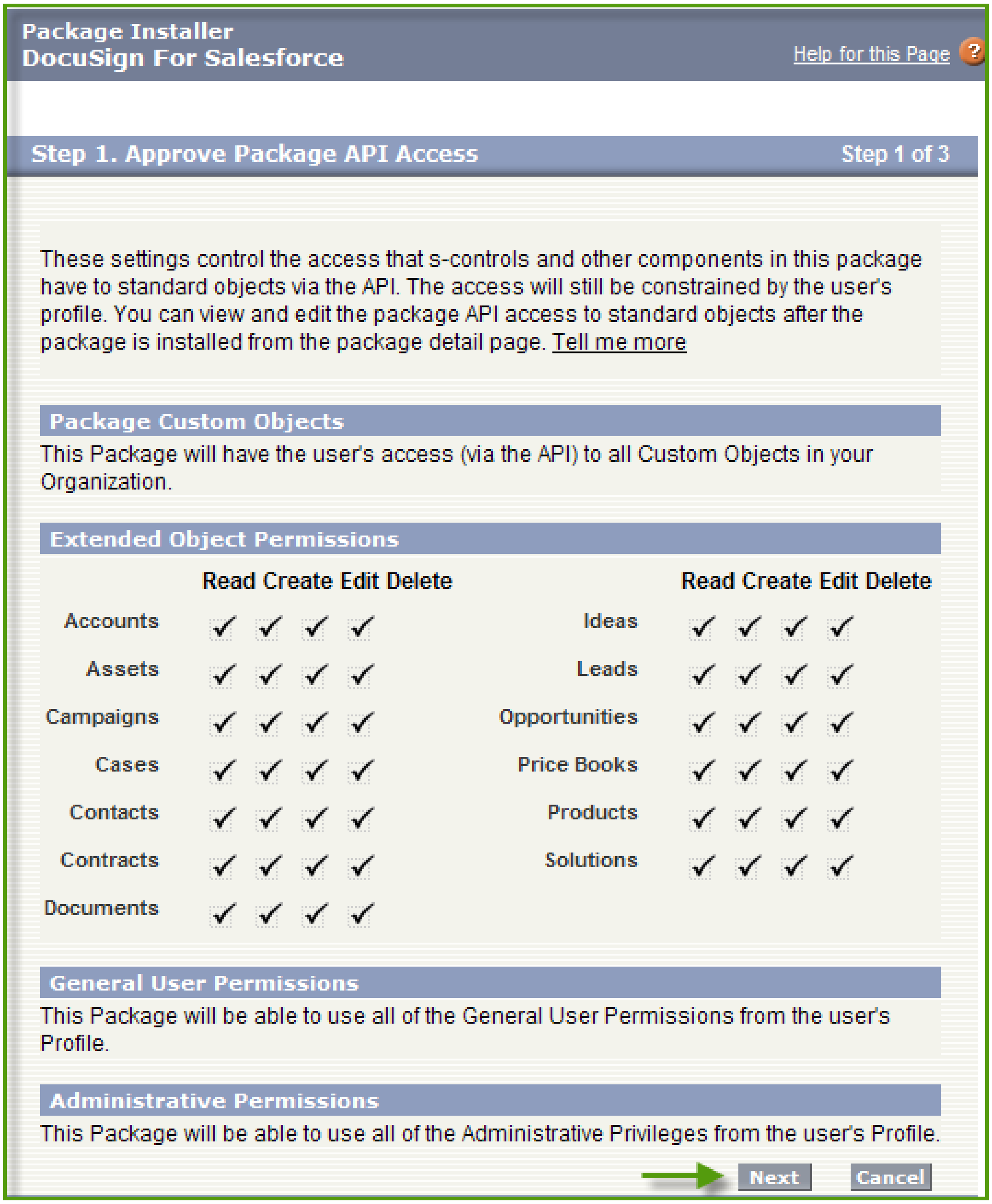
https://na2.salesforce.com/help/doc/en/sf.pdf

1 Download the DocuSign for Salesforce application from the Salesforce AppExchange.

2 Open the DocuSign for Salesforce managed package.

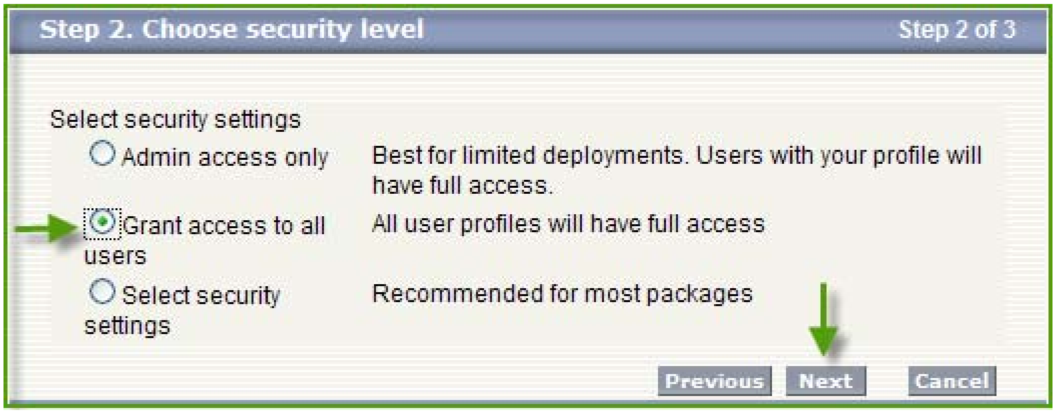
3 Click the **Continue** button.

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



4 Click the **Next** button.

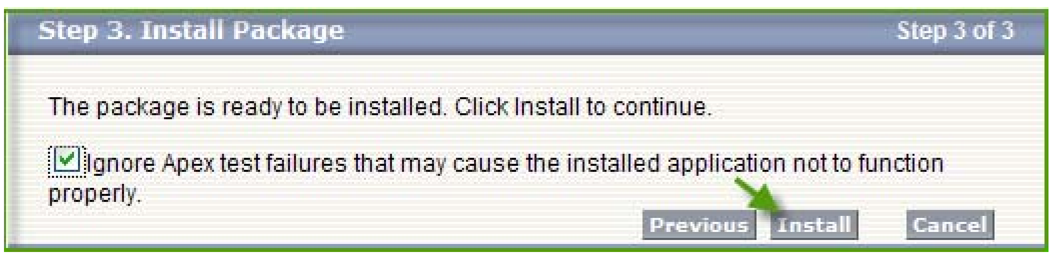
The **Choose security level** page appears.



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

6 Click the **Next** button.

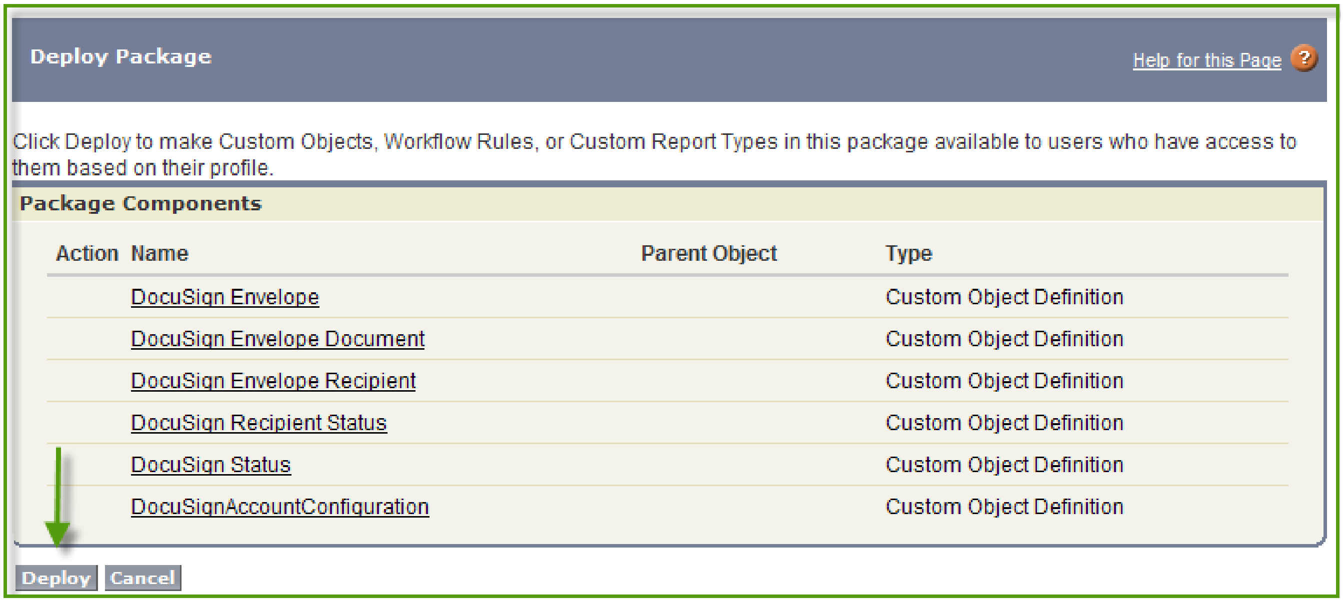
The **Install Package** page appears.



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

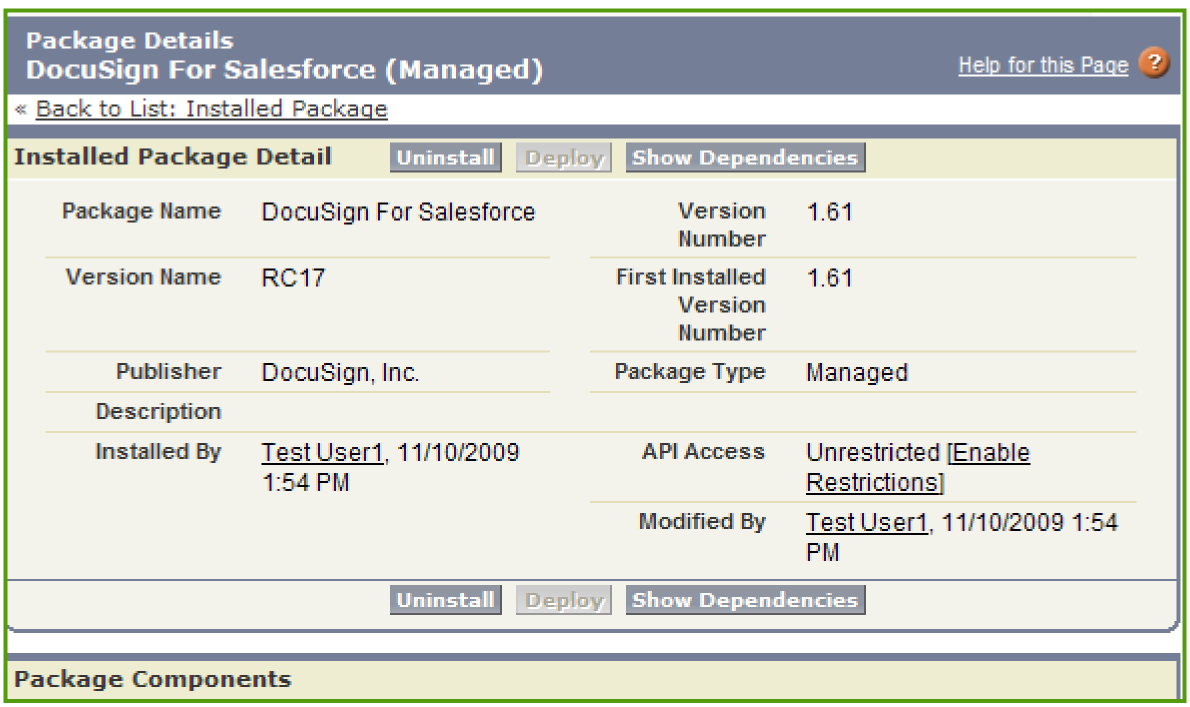
8 Click the **Install** button.

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



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

The **Package Details** page appears.



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.

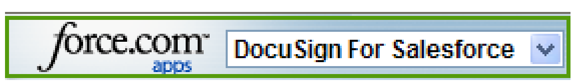
Configuring DocuSign for Salesforce

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

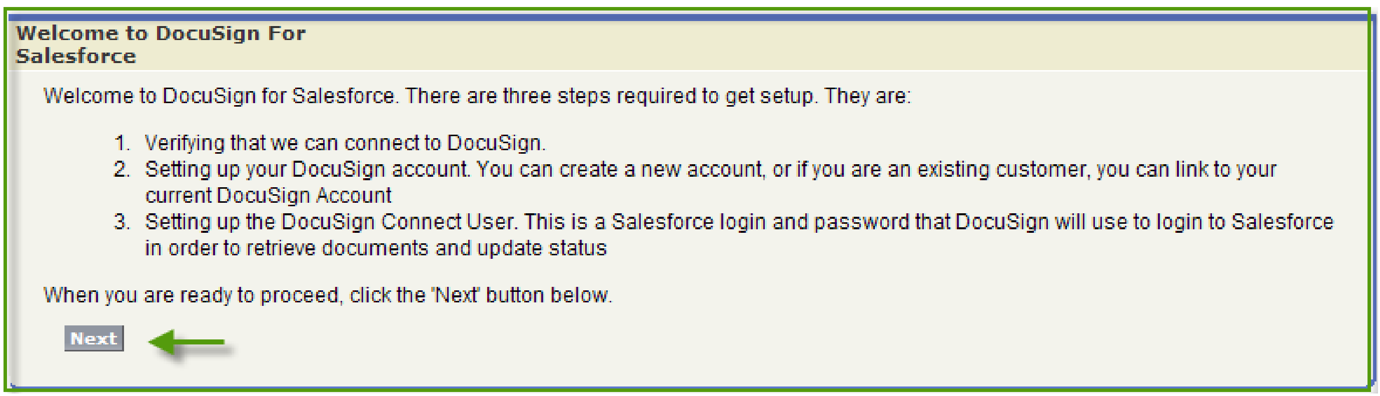
1 After you have installed DocuSign for Salesforce, go to the **force.com apps** drop list and select **DocuSign for Salesforce**.



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

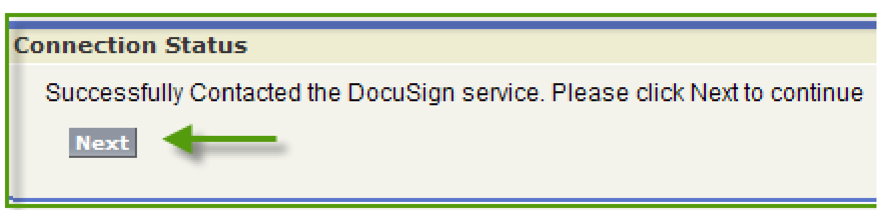
2 Click the **Setup** button.

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.



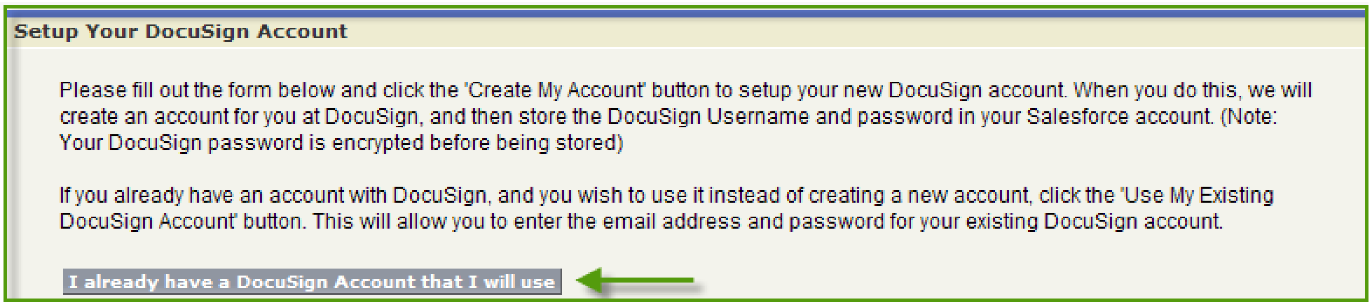
4 Click the **Next** button.

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.”

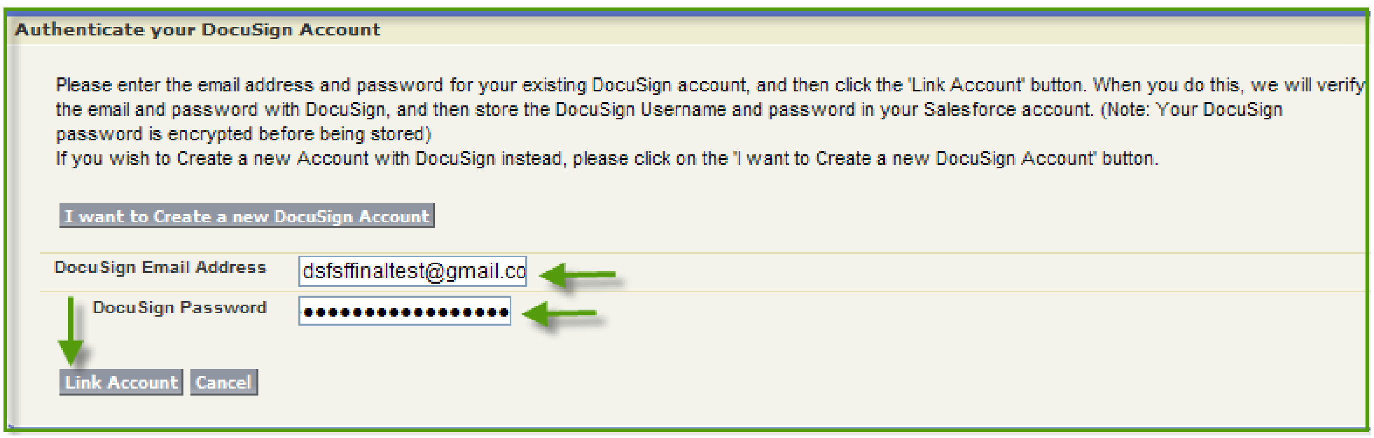
Linking Your Salesforce Account to an Existing DocuSign Service Account

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.



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



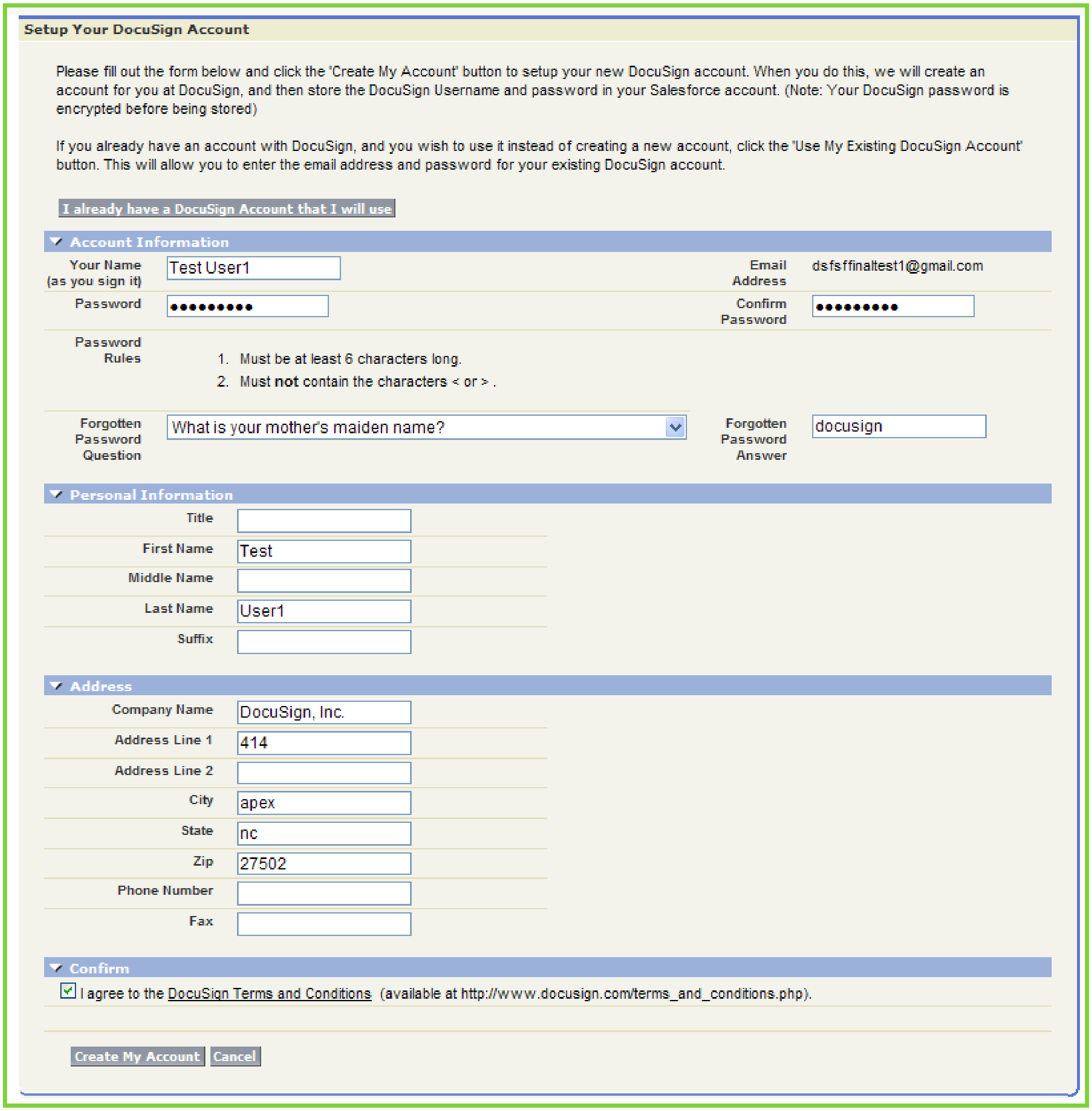
2 If you have a DocuSign email address and password, enter it and click the **Link Account** button.

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)	Test User1	Email Address	dsfsffinaltest1@gmail.com
Password	•••••••••	Confirm Password	•••••••••
Password Rules	1. Must be at least 6 characters long. 2. Must **not** contain the characters < or > .		
Forgotten Password Question	What is your mother's maiden name?	Forgotten Password Answer	docusign

Personal Information

Title	
First Name	Test
Middle Name	
Last Name	User1
Suffix	

Address

Company Name	DocuSign, Inc.
Address Line 1	414
Address Line 2	
City	apex
State	nc
Zip	27502
Phone Number	
Fax	

Confirm

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

Create My Account Cancel

1 In the **Account Information** section:

— Enter and confirm your Salesforce password.

— Select a password question and enter a password answer.

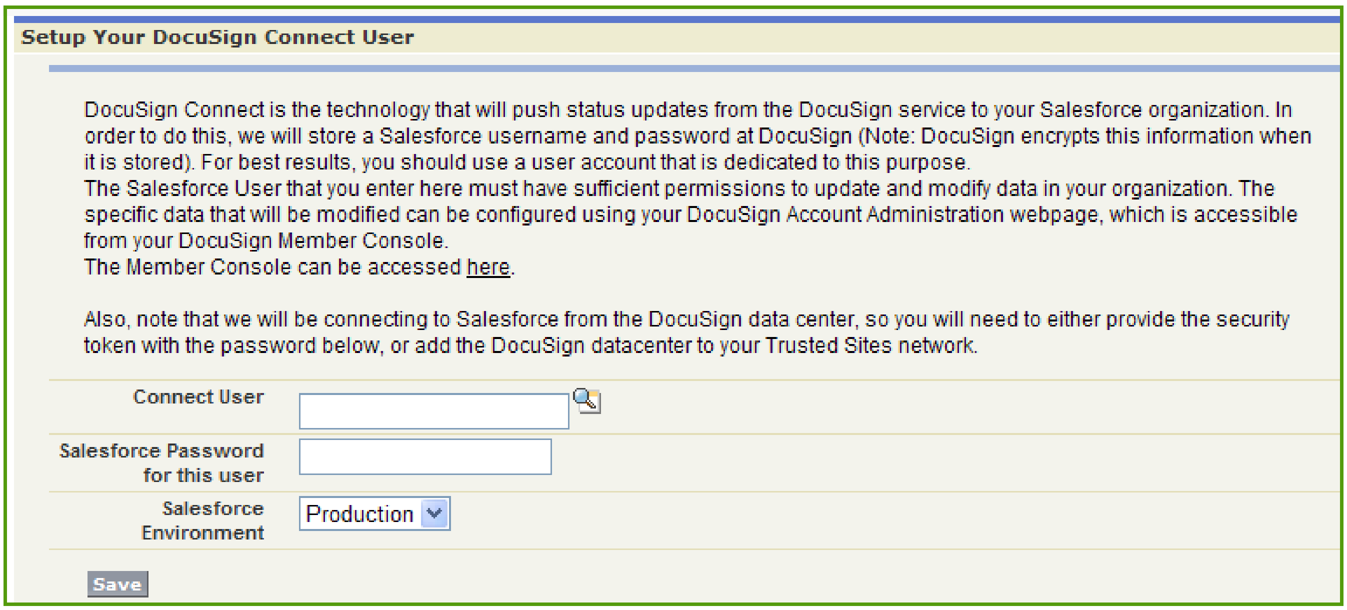
2 In the **Address** section, enter your address, city, state, and zip code.

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

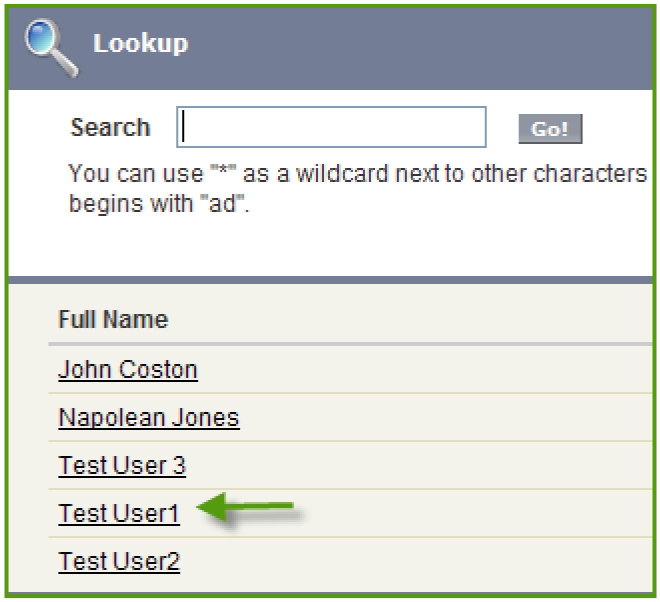
Salesforce Password for this user

Salesforce Environment: Production

Save

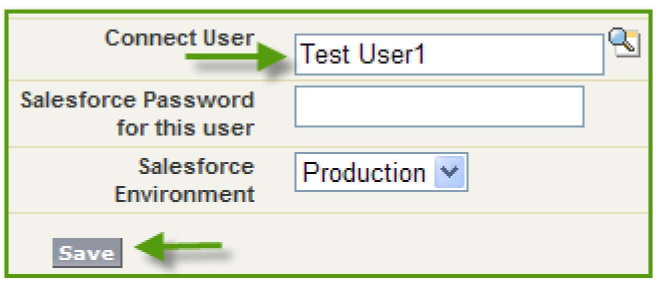
5 Click the magnifying glass next to the **Connect User** field.

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.

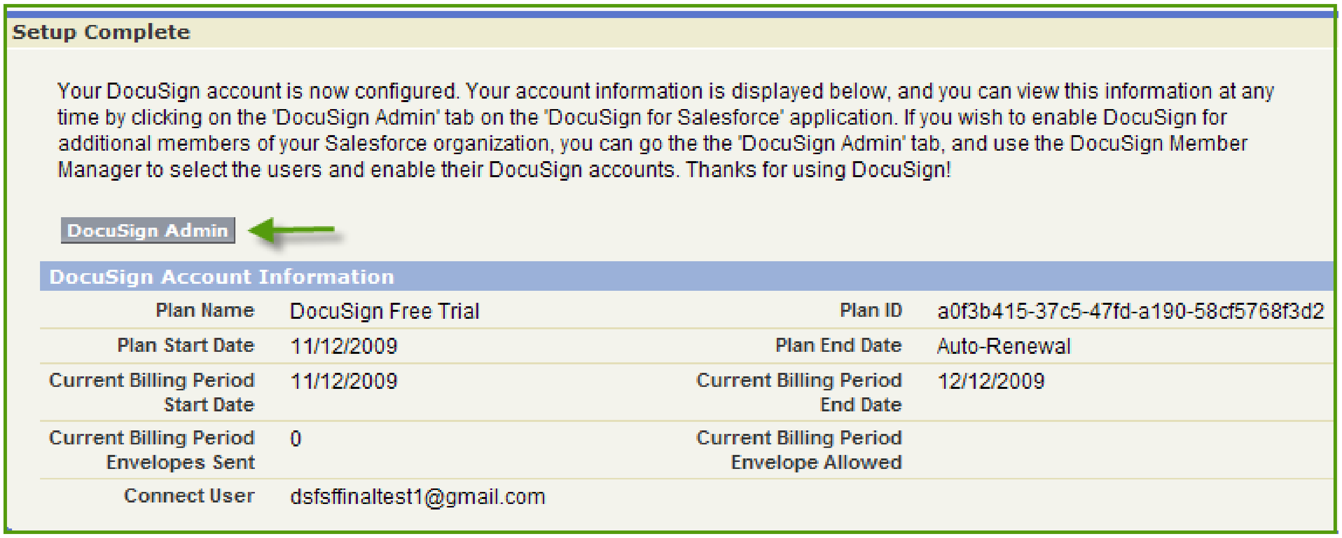
From the **Salesforce Environment** drop list, select the **Production** or **Sandbox** option.

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."



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

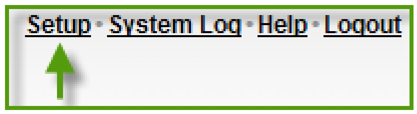
As part of the out-of-the-box DocuSign for Salesforce installation, you can configure the following Salesforce tabs with the **Send with DocuSign** button:

- Leads
- Contacts
- Accounts
- Opportunities
- Cases

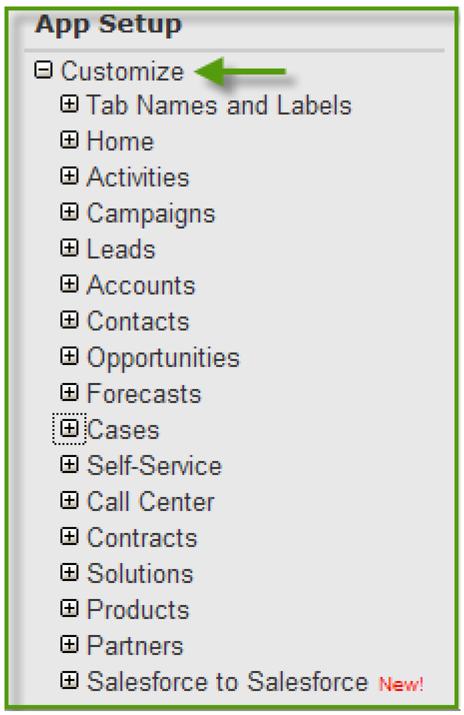
The **Send with DocuSign** button allows Salesforce users to send documents to be DocuSigned to records in these Salesforce tabs.

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.

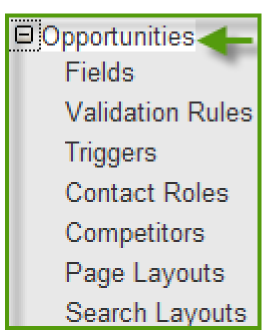
1 From DocuSign for Salesforce, click the **Setup** link at the top of the page.



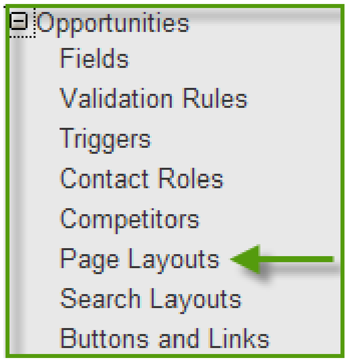
In the left column, under **App Setup**, click the **Customize** link.



2 Click the **Opportunities** link.

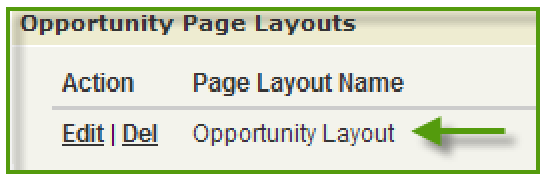


3 Under the **Opportunities** link, click the **Page Layouts** link.

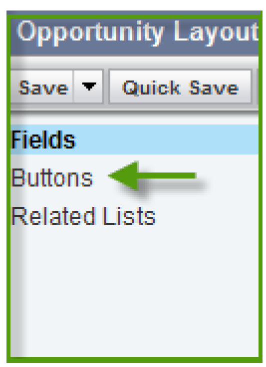


The **Opportunity Page Layout** page appears.

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

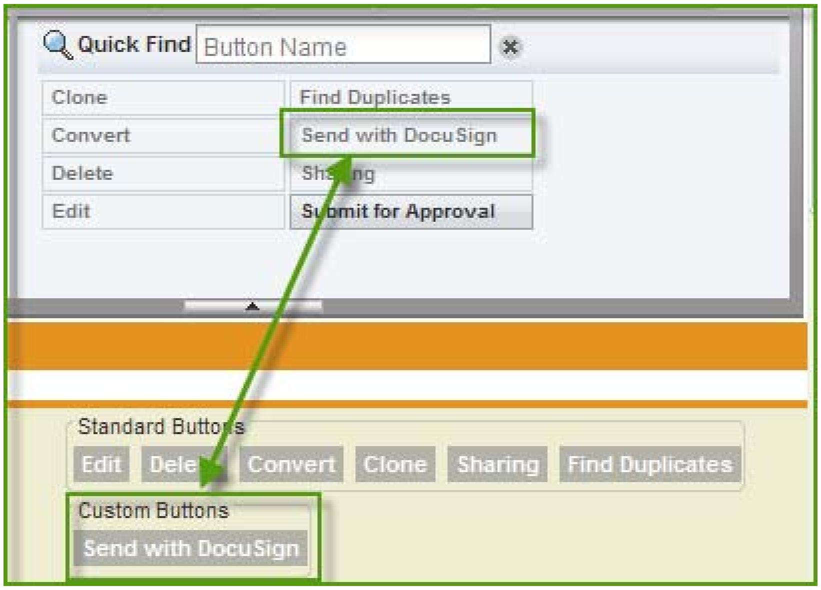


5 Click **Buttons** in the **Opportunity Layout** menu.

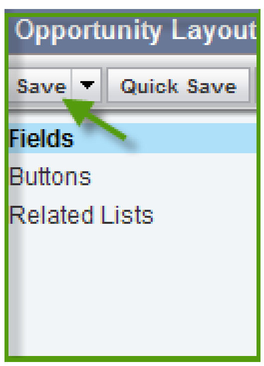


6 From the **Opportunity Layout** menu, drag the **Send with DocuSign** button to the **Custom Buttons** box.

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.

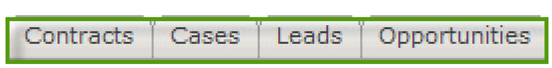


7 Click the **Save** button in the **Opportunity Layout** menu to save your edits to the page.

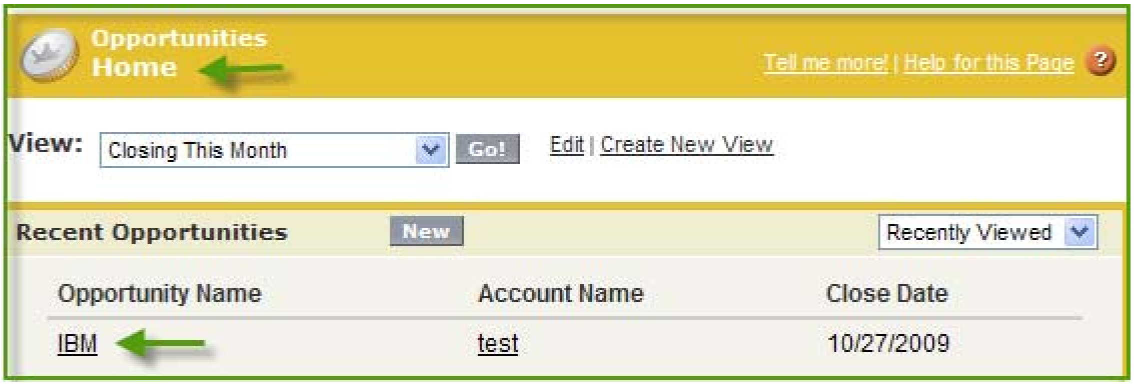


DocuSign for Salesforce updates the **Opportunities** tab by adding the **Send with DocuSign** button to the **Opportunities Detail** page.

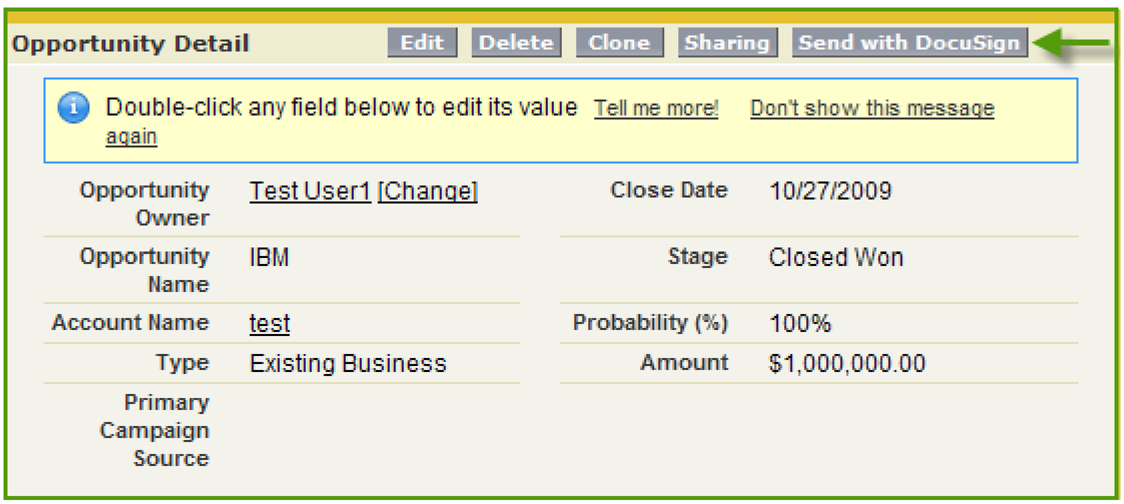
8 Click the **Opportunities** tab at the top of DocuSign for Salesforce.



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.

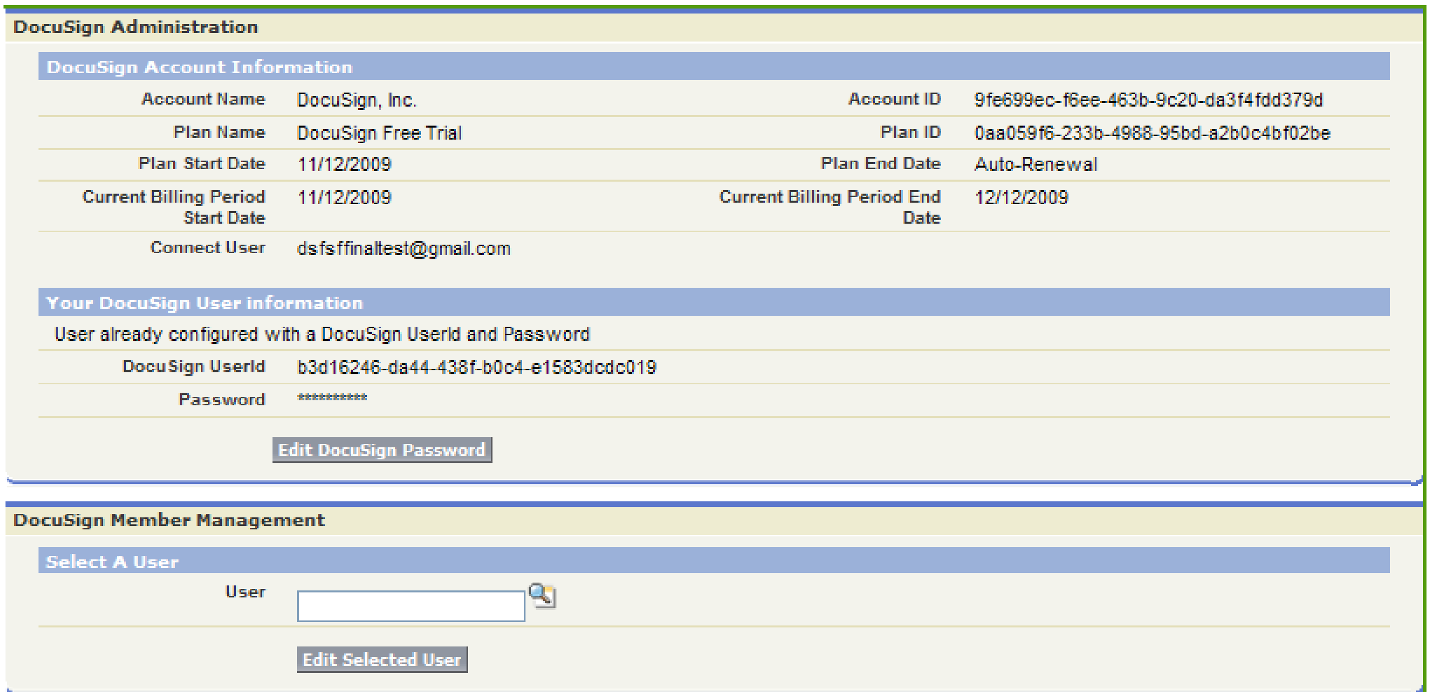


Adding Users to DocuSign for Salesforce

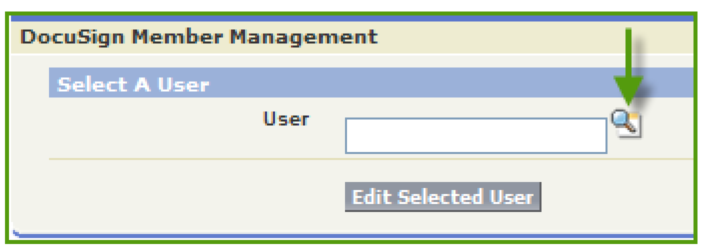
From DocuSign for Salesforce, use the **DocuSign Admin** tab to select Salesforce users and enable them to send documents to be DocuSigned.

1 Click the **DocuSign Admin** tab.

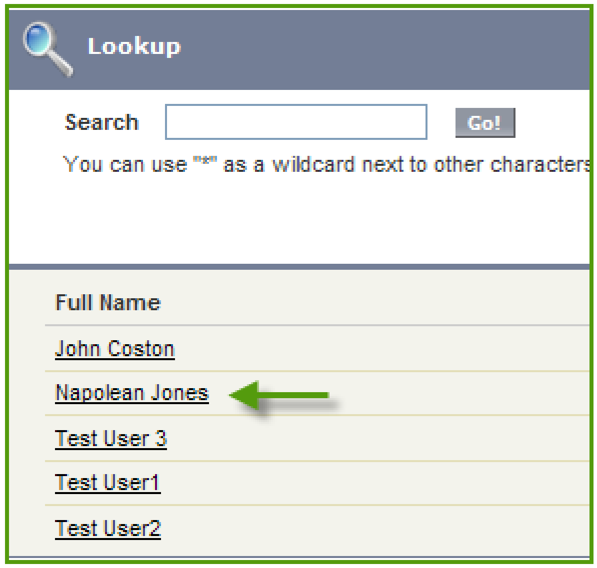
The **DocuSign Administration** page appears.



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

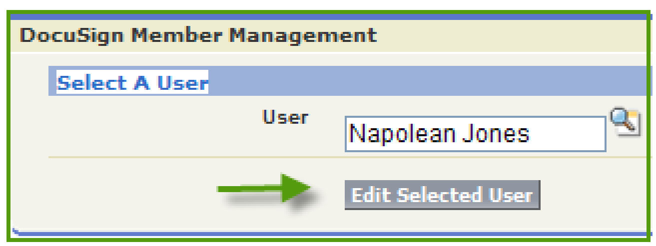


The **Lookup** page appears.



3 Search for and select a Salesforce user.

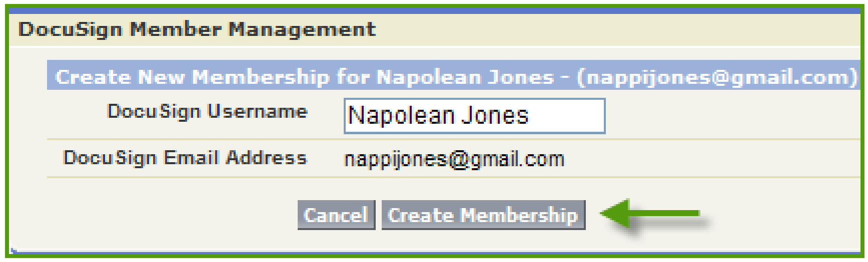
The user you selected appears in the **User** field on the **DocuSign Administration** page.



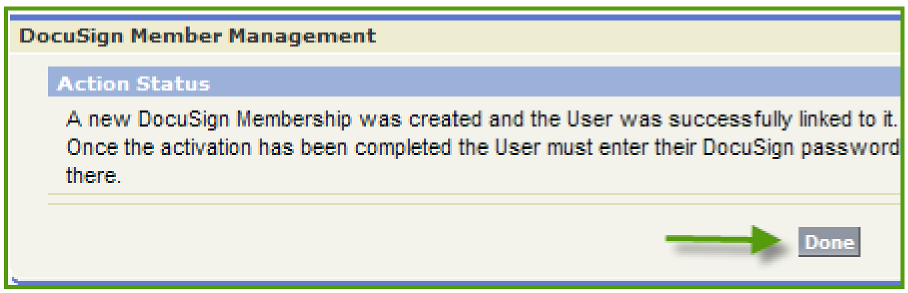
4 Click the **Edit Selected User** button.

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

5 Click the **Create Membership** button.



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.



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*

Trademark Information

Patent Information

Licensed under U.S. Patent 6,289,460, U.S. Patent 6,944,648, and other patents pending.

Contact Information

DocuSign Inc.

701 Fifth Avenue, Suite 4500

Seattle, Washington 98104

U.S.A.

tel 206.219.0200

fax 206.622.0736