



# iDialogue eSignature Admin Guide

April 2020

|                                                    |           |
|----------------------------------------------------|-----------|
| <b>Overview</b>                                    | <b>2</b>  |
| <b>Getting Started - Prerequisites</b>             | <b>2</b>  |
| Terms                                              | 2         |
| <b>Word Document Template</b>                      | <b>3</b>  |
| Hide Signature Fonts                               | 5         |
| <b>Upload to Files</b>                             | <b>6</b>  |
| <b>Mapping eSign Tags to Salesforce</b>            | <b>7</b>  |
| Generate Test Record                               | 11        |
| <b>Portal Builder</b>                              | <b>12</b> |
| <b>Lightning Experience Component</b>              | <b>14</b> |
| <b>Customer Experience</b>                         | <b>16</b> |
| <b>Salesforce User Experience</b>                  | <b>20</b> |
| Document Status                                    | 20        |
| Activity Audit Trail                               | 21        |
| iDialogue Event                                    | 22        |
| <b>Process Builder Flows - Document Automation</b> | <b>23</b> |

# Overview

iDialogue supports eSignatures natively. No integration with 3rd party eSignature solutions are required. This document describes how to install, setup, and configure typical eSignature workflows.

## Getting Started - Prerequisites

The following are required to send documents for eSignature.

- Salesforce (Any edition)
- iDialogue
- Microsoft Word
- Word document template
- Setup / Quick Start completed. CRM content enabled.

## Terms

Terms used in this document

| Term      | Definition                                                    |
|-----------|---------------------------------------------------------------|
| Signer    | A contact or user signing a document.                         |
| Timestamp | The date and time when a signature is provided. UTC timezone. |

# Word Document Template

In a MS Word document, embed signature tags where contact or user signature images will appear.

The first person to sign a document is “Signer1”. The second person to sign is “Signer2”, and so on.



**Bill To**  
{{BillToAccount.BillingStreet}}  
  
{{BillToAccount.BillingCity}} {{BillToAccount.BillingState}}  
{{BillToAccount.BillingPostalCode}} {{BillToAccount.BillingCountry}}

**Quote Date:** {{DateTime}}  
**Good Until:**  
{{Opportunity.q2cbt\_\_QuoteGoodUntil\_\_c}}

| Description                         | Qty               | Unit Price                          | Total Price                             |
|-------------------------------------|-------------------|-------------------------------------|-----------------------------------------|
| {{Item.q2cbt__QuoteDescription__c}} | {{Item.Quantity}} | {{Item.UnitPrice<br>currency="\$"}} | {{Item.TotalPrice<br>currency="\$"}}    |
|                                     |                   |                                     |                                         |
|                                     |                   | Quote Total                         | {{Opportunity.Amount<br>currency="\$"}} |

**Terms and Conditions**  
See complete list of terms and conditions at <https://www.domain.com/terms>  
{{Opportunity.q2cbt\_\_QuickStartClause\_\_c}}  
  
{{Opportunity.q2cbt\_\_Auto\_Renewal\_Clause\_\_c}}

**Customer Name**  
{{Signer1.Name}}  
**Title**  
{{Signer1.Title}}  
**Signature**  
  
{{Signer1.Signature1}}

**Timestamp**  
{{Signer1.Timestamp}}

**Counter Signer for {{Organization.Name}}**  
{{Signer2.Name}}  
**Title**  
{{Signer2.Title}}  
**Signature**  
  
{{Signer2.Signature1}}

**Timestamp**  
{{Signer2.Timestamp}}

| Tag Syntax             | Description                                                                    |
|------------------------|--------------------------------------------------------------------------------|
| {{Signer1.Signature1}} | Indicates where the first signer's signature is placed in the document.        |
| {{Signer1.Signature2}} | Indicates where the first signer's second signature is placed in the document. |
| {{Signer1.Timestamp}}  | Indicates the date time when Signer1 signature was applied.                    |
| {{Signer2.Signature1}} | Indicates where the second signer's signature is placed in the document.       |

# Hide Signature Fonts

Change the font color for `{{Signer1.Signature1}}` and `{{Signer1.Timestamp}}` tags to white so that the tags do not appear in merged documents.

The document lifecycle of an eSignature template is:

- Upload MS Word Template
- Generate PDF merge document from template
- Send PDF to customer for signature
- Overlay eSignature images and timestamps in PDF

The screenshot shows a Microsoft Word document titled "SubscriptionESignatureTemplate - Compatibility Mode". The document contains several merge fields and a table. A color selection menu is open, showing "Automatic" and "Theme Colors" with "White, Background 1" selected. Red arrows point from a text box to the signature and timestamp fields.

**Bill To**  
`{{BillToAccount.BillingStreet}}`  
`{{BillToAccount.BillingCity}}` `{{BillToAccount.BillingCity}}`  
`{{BillToAccount.BillingPostalCode}}` `{{BillToAccount.BillingPostalCode}}` `{{BillToAccount.BillingCountry}}`

| Description                                      | Unit Price                                    | Total Price                                       |
|--------------------------------------------------|-----------------------------------------------|---------------------------------------------------|
| <code>{{Item.q2cbt__QuoteDescription__c}}</code> | <code>{{Item.UnitPrice currency="\$"}}</code> | <code>{{Item.TotalPrice currency="\$"}}</code>    |
|                                                  |                                               |                                                   |
|                                                  | <b>Quote Total</b>                            | <code>{{Opportunity.Amount currency="\$"}}</code> |

**Terms and Conditions**  
See complete list of terms and conditions at <https://www.d...>  
`{{Opportunity.q2cbt__QuickStartClause__c}}`  
`{{Opportunity.q2cbt__Auto_Renewal_Clause__c}}`

**Customer Name**  
`{{Signer1.Name}}`  
**Title**  
`{{Signer1.Title}}`  
**Signature**  
`{{Signer1.Signature1}}`  
**Timestamp**  
`{{Signer1.Timestamp}}`

**Signature**  
`{{Signer2.Signature1}}`  
**Timestamp**  
`{{Signer2.Timestamp}}`

**Organization Name**  
`{{Organization.Name}}`

Page 1 of 1 89 words English (United States) Focus 200%

# Upload to Files

Upload the template to salesforce files. Select an uploaded file containing signatures.

iDialogue Admin

Home

Quick Start

Files

Portal Builder

Document

Libraries

Document Templates

ns

ned by Me

red with Me

ent

aries

Title ↑

DOC

AccountTemplate

DOC

Annual Account Donations Receipt

DOC

DocuSignQuoteTemplate

DOC

Donation Acknowledgement Receipt (3)

DOC

iDialogue Google Doc Template

DOC

iDialogue Google Doc Template v2

DOC

Investment Proposal

DOC

Investment Proposal\_Large

DOC

InvestmentTemplate

DOC

OpportunityESignatureTemplate

DOC

OpportunityTemplate

DOC

Pacific Food Bank GD

DOC

Pacific Food Bank GDW



# Mapping eSign Tags to Salesforce

View file details and click on tag builder.



All ▾

 Search Salesforce

 iDialogue Admin

Home

Quick Start

Files ▾

Portal Builder

Document Rooms ▾

Portal Ev

 File

OpportunityESignatureTemplate

Size

File Extension

Owner

35KB

docx

[Mike Leach](#)

Preview

Details

Template Tag Builder ⓘ

Open template tag builder

Data Source

Record

Master Record Type

Tags

Title

OpportunityESignatureTemplate

Description

Last Sync Date

Last Generated Date

Owner

 [Mike Leach](#)

Size

35KB

File Type

WORD\_X

File Extension

docx

Created Date

1/21/2020 10:27 PM

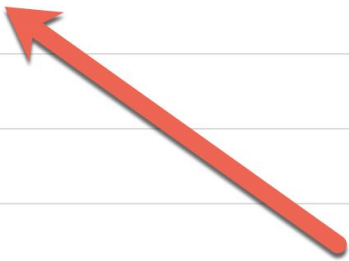
Created By

 [Mike Leach](#), 1/21/2020 10:27 P

Last Modified By

 [Mike Leach](#), 1/21/2020 10:28 P

Last Modified Date





iDialogue auto-detects all Signer tags. Associate Signer1 and Signer2 to their respective Contact and User lookup fields on the master record type.

DOC

Document Template

OpportunityESignatureTemplate

Size

35KB

File Extension

docx

Master Object Type

Opportunity

Objects

Tags

Preview

| Tag          | Object Type      |             | Source              |
|--------------|------------------|-------------|---------------------|
| Organization | Global Record    | Tag Builder |                     |
| Signer       | Select an Option | Tag Builder | Select an Option    |
| Account      | Related Record   | Tag Builder | AccountId           |
| Item         | Table Row        | Tag Builder | OpportunityLineItem |
| Opportunity  | Master Record    | Tag Builder |                     |
| User         | Related Record   | Tag Builder | OwnerId             |
| Signer1      | Select an Option | Tag Builder | Select an Option    |
| Signer2      | Select an Option | Tag Builder | Select an Option    |



| Tag          | Object Type      |             | Source                    |
|--------------|------------------|-------------|---------------------------|
| Organization | Global Record    | Tag Builder |                           |
| Signer       | Select an Option | Tag Builder | Select an Option          |
| Account      | Related Record   | Tag Builder | AccountId                 |
| Item         | Table Row        | Tag Builder | OpportunityLineItem Query |
| Opportunity  | Master Record    | Tag Builder |                           |
| User         | Related Record   | Tag Builder | OwnerId                   |
| Signer1      | Related Record   | Tag Builder |                           |
| Signer2      | Related Record   | Tag Builder |                           |

- ✓ Select an Option
- AccountId
- CampaignId
- Pricebook2Id
- OwnerId
- CreatedById
- LastModifiedById
- ContactId
- SyncedQuoteld
- ContractId
- rooms\_\_PrimarySignerContact\_\_c

Clicking on Tag Builder next to Signature links reveals available tags. In addition to contact and user fields, the Signature1, DateTime1 tags are displayed.

Default Opportunity lookup references are provided for Primary Signer Contact and Counter Signer User.

rooms\_\_PrimaryContactSigner\_\_c

rooms\_\_CounterSignerUser\_\_c

Timestamp is a date time stamp when signature 1 is signed.

|                                               |           |                     |                               |     |
|-----------------------------------------------|-----------|---------------------|-------------------------------|-----|
| {{DateTime}}                                  | System    |                     |                               | Yes |
| {{BillToAccount.BillingStreet}}               | Merge Tag | Account             | BillingStreet                 | Yes |
| {{Opportunity.q2cbt__QuoteGoodUntil__c}}      | Merge Tag | Opportunity         | q2cbt__QuoteGoodUntil__c      | Yes |
| {{BillToAccount.BillingCity}}                 | Merge Tag | Account             | BillingCity                   | Yes |
| {{BillToAccount.BillingState}}                | Merge Tag | Account             | BillingState                  | Yes |
| {{BillToAccount.BillingPostalCode}}           | Merge Tag | Account             | BillingPostalCode             | Yes |
| {{BillToAccount.BillingCountry}}              | Merge Tag | Account             | BillingCountry                | Yes |
| {{Item.q2cbt__QuoteDescription__c}}           | Merge Tag | OpportunityLineItem | q2cbt__QuoteDescription__c    | Yes |
| {{Item.Quantity}}                             | Merge Tag | OpportunityLineItem | Quantity                      | Yes |
| {{Item.UnitPrice currency="\$"}}              | Merge Tag | OpportunityLineItem | UnitPrice                     | Yes |
| {{Item.TotalPrice currency="\$"}}             | Merge Tag | OpportunityLineItem | TotalPrice                    | Yes |
| {{Opportunity.Amount currency="\$"}}          | Merge Tag | Opportunity         | Amount                        | Yes |
| {{Opportunity.q2cbt__QuickStartClause__c}}    | Merge Tag | Opportunity         | q2cbt__QuickStartClause__c    | Yes |
| {{Opportunity.q2cbt__Auto_Renewal_Clause__c}} | Merge Tag | Opportunity         | q2cbt__Auto_Renewal_Clause__c | Yes |
| {{Organization.Name}}                         | Merge Tag | Organization        | Name                          | Yes |
| {{Signer2.Name}}                              | Merge Tag | User                | Name                          | Yes |
| {{Signer1.Title}}                             | Merge Tag | Contact             | Title                         | Yes |
| {{Signer2.Title}}                             | Merge Tag | User                | Title                         | Yes |
| {{Signer1.Signature1}}                        | Signature | Contact             |                               | Yes |
| {{Signer2.Signature1}}                        | Signature | User                |                               | Yes |
| {{Signer1.Timestamp}}                         | Signature | Contact             |                               | Yes |
| {{Signer2.Timestamp}}                         | Signature | User                |                               | Yes |
| {{Organization.Street}}                       | Merge Tag | Organization        | Street                        | Yes |
| {{Organization.City}}                         | Merge Tag | Organization        | City                          | Yes |
| {{Organization.State}}                        | Merge Tag | Organization        | State                         | Yes |
| {{Organization.PostalCode}}                   | Merge Tag | Organization        | PostalCode                    | Yes |

# Generate Test Record

Template Status

Status: Valid

Objects Mapped  
7 of 7

Fields Mapped  
34 of 34

Recent Test Records

[Add test record](#)

|                                                                                   | Name                               | Last Generated                                     | Action                       |
|-----------------------------------------------------------------------------------|------------------------------------|----------------------------------------------------|------------------------------|
|  | <a href="#">Saturn Technolo...</a> | 2020-03-22<br>07:17:09<br><a href="#">download</a> | <a href="#">Generate New</a> |

Add a test record and generate a merged document to preview how the eSignature tags will appear in merged docs (ideally they are white font on white background)

# Portal Builder

Add a document plugin to a portal page layout. Select a document from the content library and drag it onto the page.

If the document contains any signature tags, then the “eSign” action button will automatically be added to the document plugin layout.

 **Quote Room**

Document Room

Hello {{Member.FirstName}},

Welcome to iDialogue! This is the default portal that contacts will use to interact with Salesforce users. Add plugins to this page layout to share documents and collect payments.

Best Regards,  
{{Owner.FirstName}}

 OpportunityESignatureTemplate

Download

eSign

Page > Document Plugin

Content Library

Document Ter ▼

Documents

OpportunityE! ▼

Display Name

OpportunityESig

Share With Room Members

☒ Administrators

☒ Collaborators

☐ Viewers

Export/Download Format

 Word

 PDF

☒ Attach on Merge

Document Actions

☒ Download

☐ Accept

☐ Reject

☒ eSign

Click on the eSign action button in right-side settings panel to customize

- a) eSign button label
- b) eSign button color
- c) eSign legal agreement label
- d) eSign link or button display type

The screenshot shows the PacificApps Quote Room interface. The main header includes the PacificApps logo and 'Quote Room' title. The right sidebar contains settings for the 'Document Room' plugin, including 'Content Library', 'Documents', 'Display Name', 'Share With Room Members', 'Export/Download Format', and 'Document Actions'. The 'Document Actions' section has checkboxes for 'Download', 'Accept', 'Reject', and 'eSign'. The 'eSign' button is highlighted with a red box. A red arrow points from this button to the 'Action Properties' dialog box. The dialog box has a title bar 'Action Properties' and a 'Preview' button. It contains fields for 'Label' (eSign), 'Display Type' (Link/Button), 'Background Color' (#5679C0), and 'Action Type' (DOCUMENT\_ESIGNED). The 'eSign Label' field contains the text 'I agree to be bound by the terms and conditions in this agreement.' The dialog box also has 'Cancel' and 'Save' buttons.

Publish the portal so that the eSign document template may be used in Salesforce records.

# Lightning Experience Component

Add the iDialogue lightning component to the Opportunity page layout, or any record from which eSigned documents will be generated.

Select a document portal that has been preconfigured with an eSign document and click “Generate Documents” once ready.

 **Subscription Quote Dialogues**

New Subscription 

Open Document Portal 

DOCUMENTS (1)

MEMBERS (1)

ACTIVITY (0)

Merge All

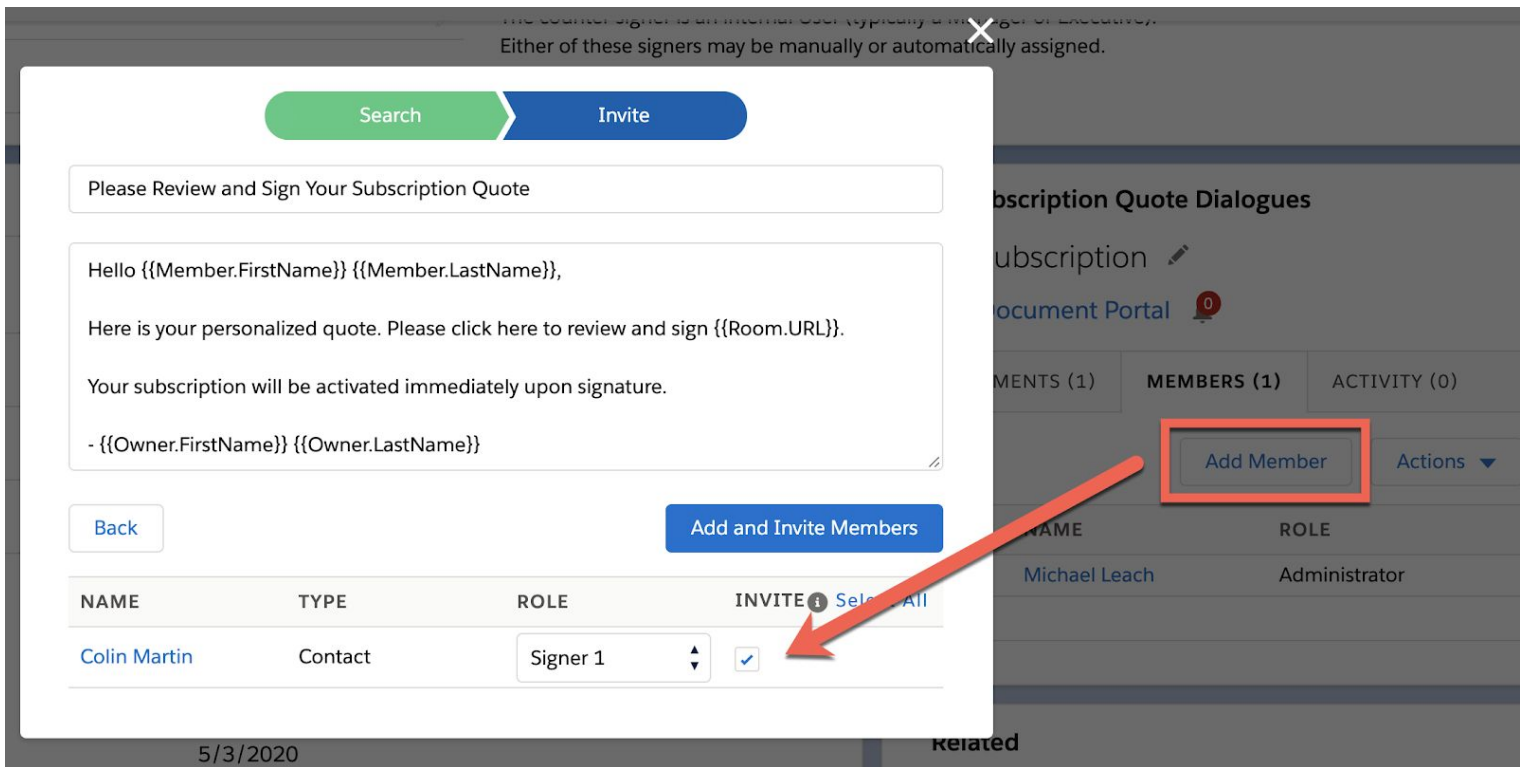
File Upload

 Subscription Agreement

Add members to the document and establish the signing role to each member.

The first person to sign the document is “Signer 1”. The second is “Signer 2”, and so on.

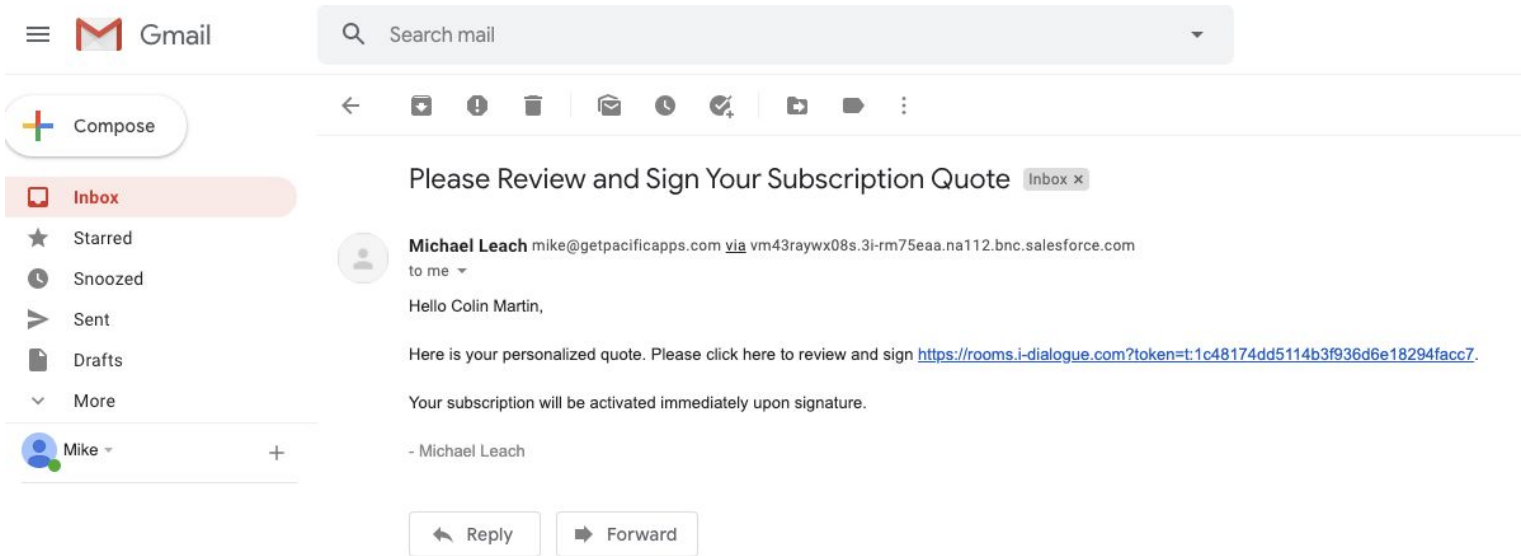


Note: If Signer 1 is mapped to a contact field in the tag builder, then verify the “Signer 1” role is assigned to a contact member. Same thing applies to “Signer 2” and User members.



# Customer Experience

The customer/contact will receive an email with an invitation to review and eSign the document.



Welcome Colin!

Here is your personalized subscription quote. Please review and "eSign" to start your subscription.

If you've opted to pay using a credit card, please use the payment form below.



Subscription Agreement

[Download](#)
[eSign](#)

< **Personal Info**    >

First Name

Colin

Last Name

Martin

Email

idialoguedemo@gmail.com

Street

876 Central Court

City

Pleasanton

State/Province

CA

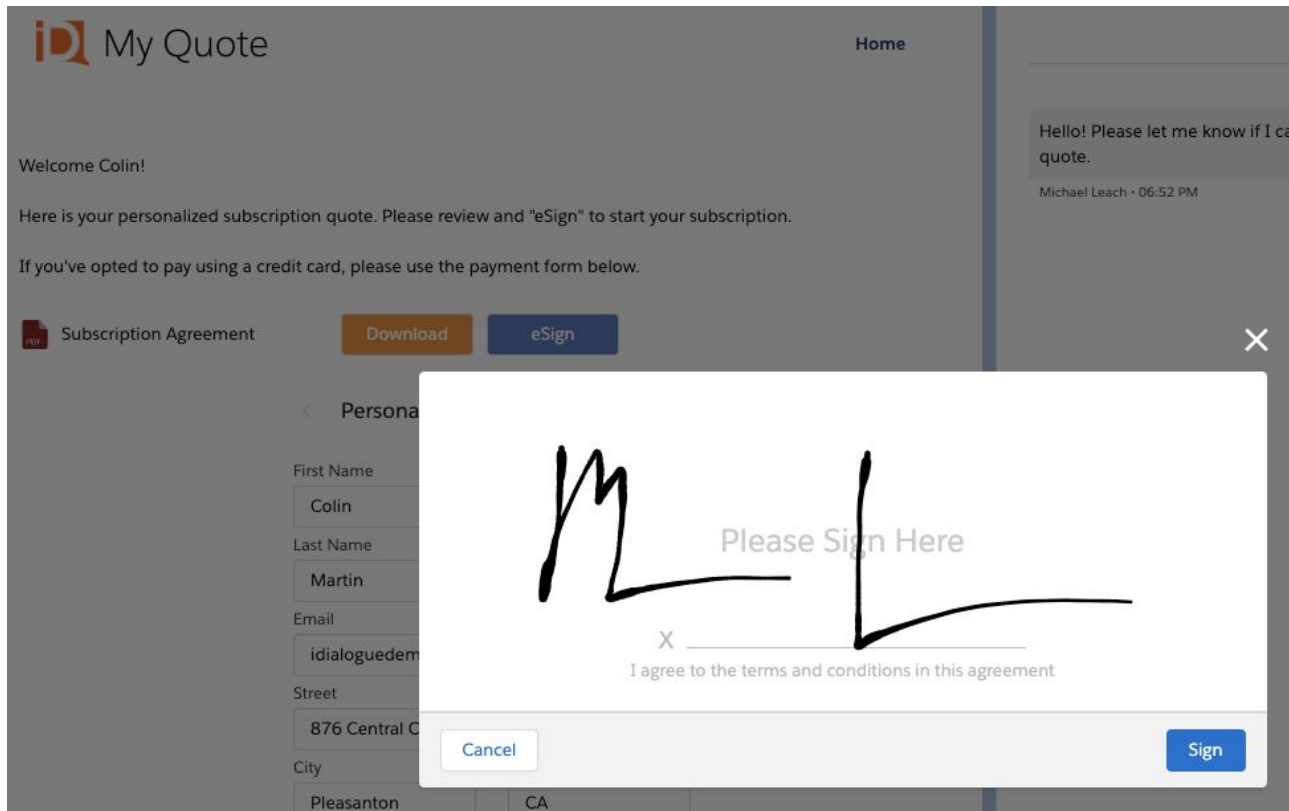
Postal Code

94588

Country

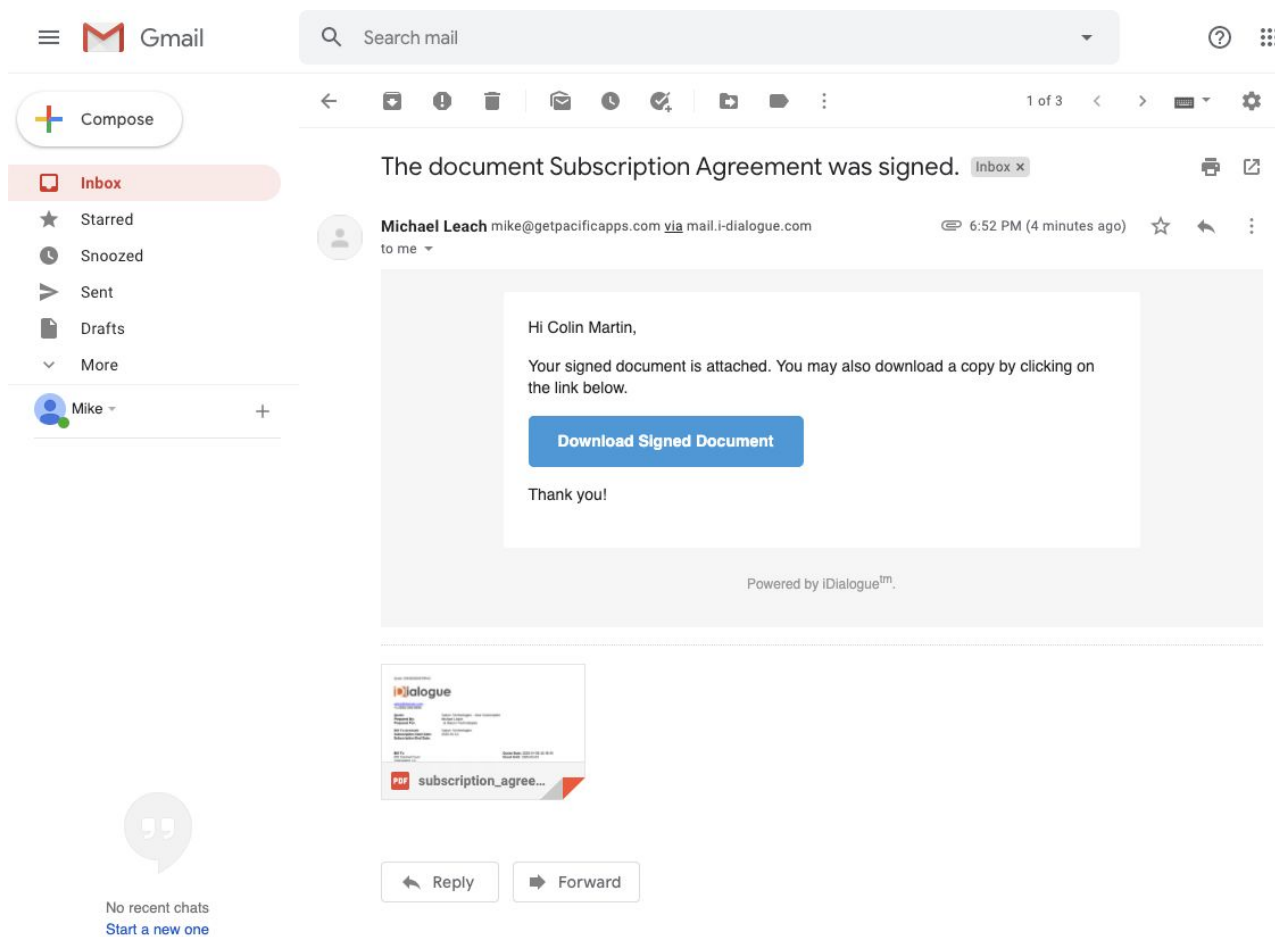
USA

[Next](#)



Upon signing the document, several events are executed. If there are subsequent signers, they will be notified to sign the document.

All parties will receive an email with the signed document attached.



# Salesforce User Experience

The signed document will be attached to the Salesforce record and the document status icons will indicate the document is signed.

## Document Status

Closed Won

Change Closed Stage

Subscription Quote Dialogues

New Subscription

Open Document Portal

DOCUMENTS (1)

MEMBERS (2)

ACTIVITY (6)

Merge All

File Upload

PDF

Subscription Agreement

✓✓✓

▼

Related

Products (0)

▼

Notes & Attachments (3)

▼

Subscription Agreement\_Signed.pdf

Apr 3, 2020 • Attachment

The three status icons / checkmarks indicate:

- Document generated
- Sent / Waiting for signature
- Signed / completed

Signed document attached to record.

# Activity Audit Trail

Click on the “Activity” tab to review read receipts and the audit trail of events.

 **Subscription Quote Dialogues**

New Subscription 

Open Document Portal 

| DOCUMENTS (1) | MEMBERS (2) | <u>ACTIVITY (6)</u>                                                                                                                                                                                                            |  |
|---------------|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
|               |             | <div> <b>Document Room Viewed by ...</b> 06:53pm   4/03/20</div> <div>The document room was viewed by Colin Martin</div>                      |  |
|               |             | <div> <b>Document eSigned</b> 06:52pm   4/03/20</div> <div>The document was eSigned by Colin Martin</div>                                     |  |
|               |             | <div> <b>Subscription Agreement Vie...</b> 06:52pm   4/03/20</div> <div>The document Subscription Agreement was viewed by Colin Martin</div> |  |
|               |             | <div> <b>Document Room Viewed by ...</b> 06:52pm   4/03/20</div> <div>The document room was viewed by Colin Martin</div>                    |  |
|               |             | <div> <b>Document Room Invite Sent</b> 06:51pm   4/03/20</div> <div>Invite sent to Colin Martin<br/>(idialoguedemo@gmail.com)</div>         |  |
|               |             | <div> <b>Document SubscriptionESign...</b> 06:45pm   4/03/20</div> <div>The document SubscriptionESignatureTemplate was</div>               |  |

# iDialogue Event

An iDialogue event is created of type DOCUMENT\_ESIGNED.

iDialogue Admin

Home

Quick Start

Files

iDialogue Events

More

iDialogue Events

All

50+ items • Sorted by Created Date • Filtered by all idialogue events • Updated a few seconds ago

New

Import

Change Owner

Printable View

Search this list...

|    | <input type="checkbox"/> | Event ID        | Created Date       | Event Type       | Subject               |  |
|----|--------------------------|-----------------|--------------------|------------------|-----------------------|--|
| 7  | <input type="checkbox"/> | Event-000003... | 4/2/2020, 5:05 AM  | DOCUMENT_ESIGNED | Document eSignature   |  |
| 8  | <input type="checkbox"/> | Event-000003... | 3/30/2020, 8:45 PM | ERROR            | Payment Method Submit |  |
| 9  | <input type="checkbox"/> | Event-000003... | 3/30/2020, 2:44 PM |                  | Tax Jar API Response  |  |
| 10 | <input type="checkbox"/> | Event-000003... | 3/27/2020, 9:23 AM |                  | Tax Jar API Response  |  |

# Process Builder Flows - Document Automation

Process Builder Flows may be designed to automate post-eSignature tasks, like advancing an Opportunity stage, updating a checkbox field, or notifying a record owner.

Setup

Home

Object Manager

Process Builder - Quote Signatures Received

← Back To S

Expand All

Collapse All

View All Processes

Clone

View Properties

Deactivate

START

iDialogue Event

Event = DOCUMENT\_ESIGNED?

TRUE

IMMEDIATE

Opportunity

+ Add Action

FALSE

+ Add Criteria

TRUE

IMMEDIATE

+ Add Action

Define Criteria for this Action Group

Criteria Name \*

Event = DOCUMENT\_ESIGNED?

Criteria for Executing Actions \*

Conditions are met

Formula evaluates to true

No criteria—just execute the actions!

Set Conditions

|   | Field *           | Operator * | Type *  | Value *          |
|---|-------------------|------------|---------|------------------|
| 1 | [rooms__Room... Q | Equals     | String  | DOCUMENT_ESIGNED |
| 2 | [rooms__Room... Q | Is null    | Boolean | False            |

Conditions \*

All of the conditions are met (AND)