



Product Overview

RSign® for Salesforce
fully integrates with your CRM allowing you to add Contacts, Leads and Users as Signers. Send a copy and keep all the relevant stakeholders updated. It also features a quick search for you to use your RSign and Salesforce Email Templates.

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Add Documents *Fast*

 DOCUMENTS

Order

Name

Action

Add at least one document.

Add Documents

Add Documents

Attachments

Desktop Attachments

RSign® for Salesforce provides users with friendly and fast ways to add the documents you want to sign.

- **Attachments:** Choose one or more documents related to the Salesforce record where you clicked the “Send with RSign” button.
- **Desktop Attachments:** Select any files you want to use from your computer.
- **By Selecting a Salesforce or RSign Template:** Add attachments even faster by taking advantage of the documents you have ready on your templates.

Set Up Recipients Intuitively

 RECIPIENTS

Add Recipients

Order	Type	Recipient Type	Name	Email	Action
1	Signer	Select Recipient Type	Hank Scorpio	hankscorpioglobex3@gmail.com	
0	CC	Select Recipient Type	Add Recipient Name	Add Email	

☐ Sign in Sequence

Select Recipient Type

Contacts

Leads

Users

Add New

RSign® for Salesforce makes adding signers and stakeholders easy and user friendly. Add any Salesforce Contacts, Leads or Users or add people who are not even in the system.

- **Signer:** Add all the required signers and set up a signing order if required.
- **CC:** Keep all stakeholders up to date by adding them as CC. They won't have to sign but they will receive communications.
- **Prefill:** Manually set up values before sending your documents or get Salesforce field values to set parts of the document up.



Streamlined Messaging

 ADD MESSAGE

☒ Salesforce Template ☐ RSign Template

Salesforce Template

Select Salesforce Template

* Subject

Subject

* Message 











Confidence and Security

⚙️ OPTIONS

Date Format
US

Expires in
30 Days

Send Reminder in
0 Days

Then Send Reminder every
0 Days(3 Max)

Send final reminder before expiration
0 Days

Access Authentication
Select

Enter Access Code or Leave Blank

☐ Email Access Code

Send Individual Signature Notifications
☒

Y

Include Signature Certificate in the signed PDF
☒

Y

With **RSign®** for **Salesforce** you can have peace of mind and create the security you need to handle your important documents.

- Define an **expiration date** to follow your business processes or the legal signature term.
- Set up **automatic reminders** to make sure that your documents get signed.
- Create a **password** to protect sensitive information. Have even more security by requesting a password to access the documents.



Native Tracking, Find Signed Documents

RSign® for Salesforce will store tracking records & signed documents in the Salesforce database. You can define data sharing and security for all your users.

- Use List Views, Reports and Dashboards for quick overviews.
- Build any Salesforce automation based on the tracking object to meet your business needs.

 RSign Status
RSS-08545524-1378-DEDA-5533-DDEC

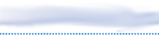
Details

RSign Status Name	RSS-08545524-1378-DEDA-5533-DDEC	Subject	Thanks for choosing us, please sign the NDA
Envelope Code	08545524-1378-DEDA-5533-DDEC	Sender	 @rpost.com
Current Status	Completed	Sent	9/10/2020, 12:54 PM
Contact Item			

▼ Sent From

Account		Lead	
Opportunity		Contact	Hank Scorpio
Case			

▼ System Information

Created By	  , 9/10/2020, 12:54 PM	Last Modified By	  , 9/11/2020, 1:00 PM
Owner	  		



Even Faster with OneClick

S.T.A.R. Labs

RSign Fields	Salesforce Fields	Value
* Company Name	Account Name	S.T.A.R. Labs

Recipients

Signing Method: Default

Order	Type	Recipient Type	Name	Email
	Prefill	Select Recipient Typ		@rpost.com
	Signer	Contact		
	Signer	User		@rpost.com

Back

Cancel

Send

Make users more productive with **RSign®** for **Salesforce** by using our **OneClick** function.

Enable this feature and save time pre-setting up documents and selecting the Salesforce field values you want to include.

Manage the UX



GENERAL SETTINGS:

Options	Display	Default Value
Date Format	Active	US
Expires in	Active	30 Days
Send first reminder in	Active	0 Days
Then send follow-up reminders every	Active	0 Days (3 Max)
Send final reminder before expiration	Active	0 Days
Access Authentication	Active	Select Enter Access Code or
Email Access Code		Unchecked
Send Individual Signature Notifications	Active	Y
Include Signature Certificate in the	Active	

With **RSign®** for **Salesforce** you can enable / disable the options shown to your users, keeping the UX relevant and simple.

You can set up defaults to force company policies.



Manage Users in Salesforce

Please Select User View

All Salesforce Org Users

All Salesforce Org Users

Active RSign Users

Users Pending Approval

You don't need to access a different system to manage your users, **RSign® for Salesforce** helps you have control in one place.

Users currently not connected to RSign

	Full Name	Email	Username
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]