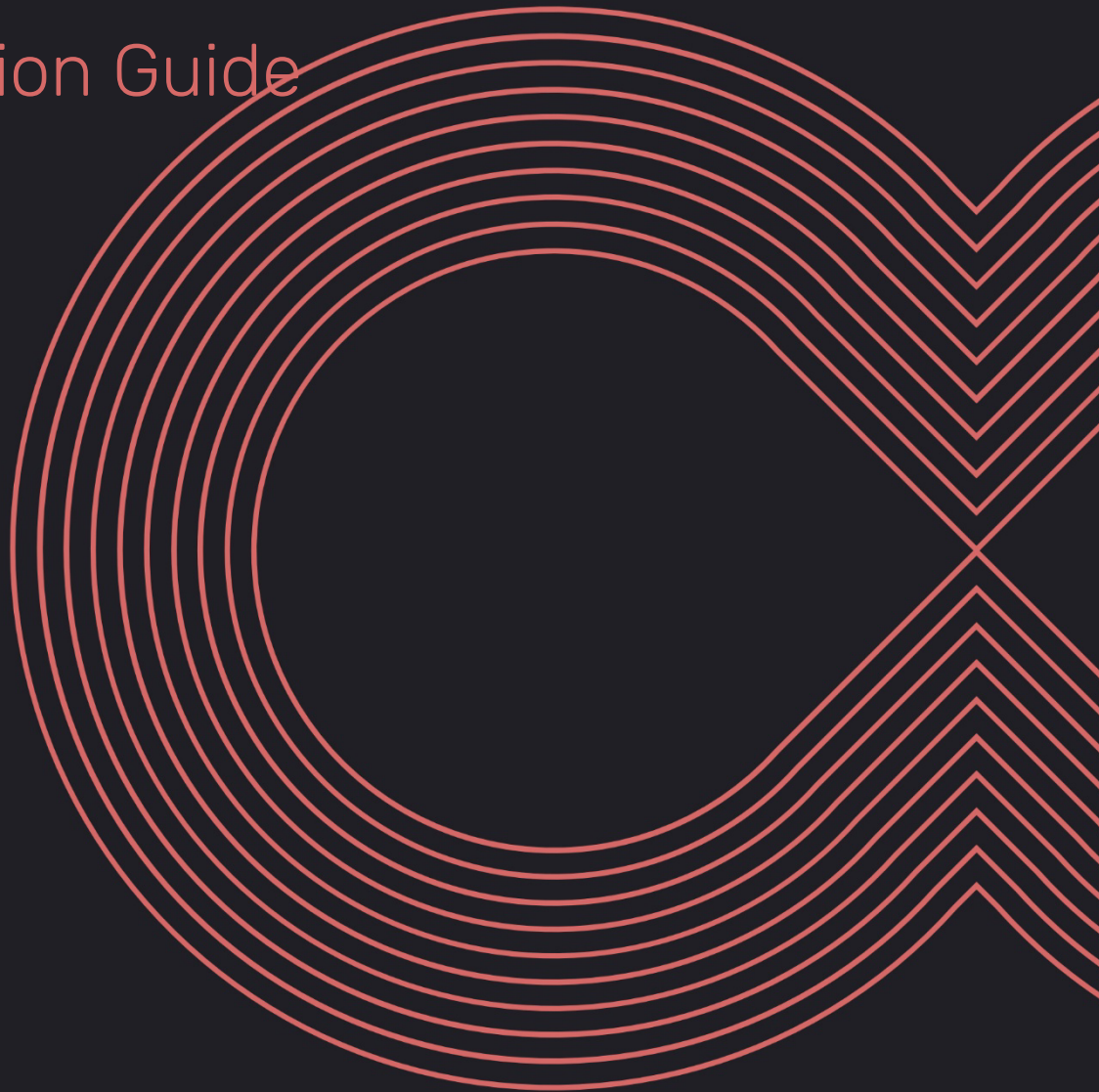


oodrive sign

Oodrive Sign for Salesforce®

Installation Guide



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1. Package Installation

1. Click on the install link for production or sandbox environments:
 - [Sandbox](#)
 - [Production](#)
2. Choose a security level. We recommend choosing **Install for All Users**, but you may wish to limit access to certain profiles and users. Click on the **Install** button to start the installation of the package.



Install oodrive_sign App

By oodrive_sign



☐ **Install for Admins Only**



☒ **Install for All Users**



☐ **Install for Specific Profiles...**



You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program. [i](#)

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install

Cancel

App Name	Publisher	Version Name	Version Number
oodrive_sign App	oodrive_sign	Test	1.6

Additional Details [View Components](#)

3. A "processing" screen will appear.



Install oodrive_sign App

By oodrive_sign



Installing and granting access to all Users...

App Name	Publisher	Version Name	Version Number
oodrive_sign App	oodrive_sign	Test	1.6

[Additional Details](#)
[View Components](#)

4. An email will be sent to you when the installation is complete.



Install oodrive_sign App

By oodrive_sign



This app is taking a long time to install.
You will receive an email after the installation has completed.

App Name	Publisher	Version Name	Version Number
oodrive_sign App	oodrive_sign	Test	1.6

After installation, the package will appear in the list of installed packages:

Action	Package Name	Publisher	Version Number	Namespace Profile	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integration	Expiration Date	Install Date	Checks	App	Size	Objects	AppExchange Ready
Uninstall Manage Licenses	 oodrive_sign.50a	oodrive_sign	1.6	oaldrsign	Active	Unlimited	0	✓	Does not expire	10/20/2022 11:08	✓	1	3	4	Not Passed

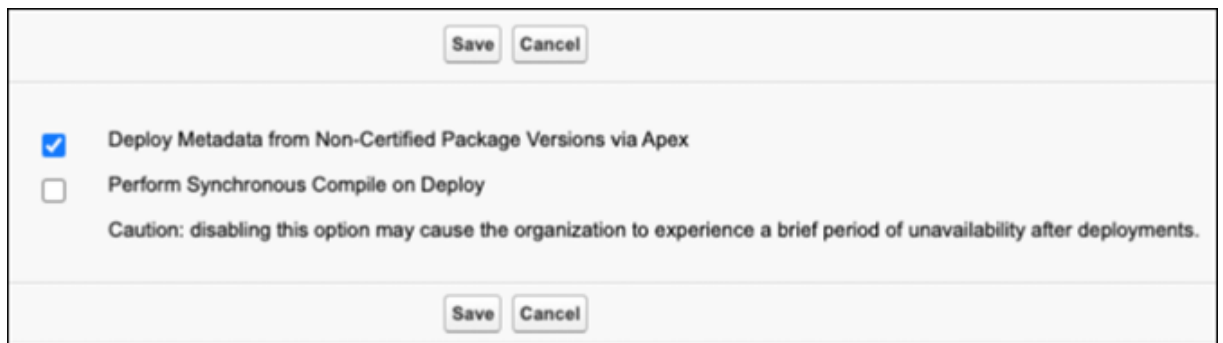
2. Environment Settings

1. In Custom Settings, click **Manage** in front of the **Environment Settings** line.
2. Click on the **Edit** button to set the **Default Organization Level Value**.
3. Fill the mandatory fields with the values provided in your Oodrive Sign license document:
 - contract_definition_id
 - j_token
 - actor_id

Environment Settings Information	
Location	oodrive_sign
Appendices Folder Name	[oodrive_sign] Appendices
CallbackURL	https://www.sellandsign.com
Documents Folder Name	[oodrive_sign] Documents
Finalize in oodrive_sign	☐
actor_id	0
contract_definition_id	0
j_token	TEST_TOKEN

- Appendices Folder Name: the folder name where all the common appendices are stored.
- Documents Folder Name: the folder name where all the common documents are stored.
- Finalize in oodrive_sign: check this option to allow users to finalize the signature process in the oodrive_sign portal.

4. In Apex Settings, check the **Deploy Metadata from Non-Certified Package Versions via Apex** option, and then save.



Save Cancel

☒ Deploy Metadata from Non-Certified Package Versions via Apex

☐ Perform Synchronous Compile on Deploy

Caution: disabling this option may cause the organization to experience a brief period of unavailability after deployments.

Save Cancel

3. Callback

1. From the App Launcher, to go the **oodrive_sign** App:



Search: oodrive_sign

Apps

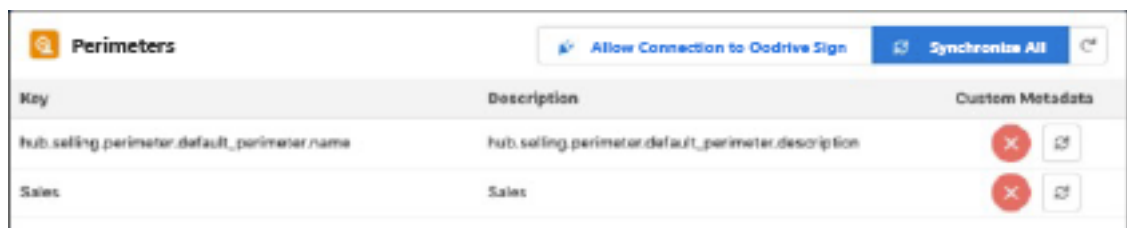
 **oodrive_sign**

Items

No results

[View All](#)

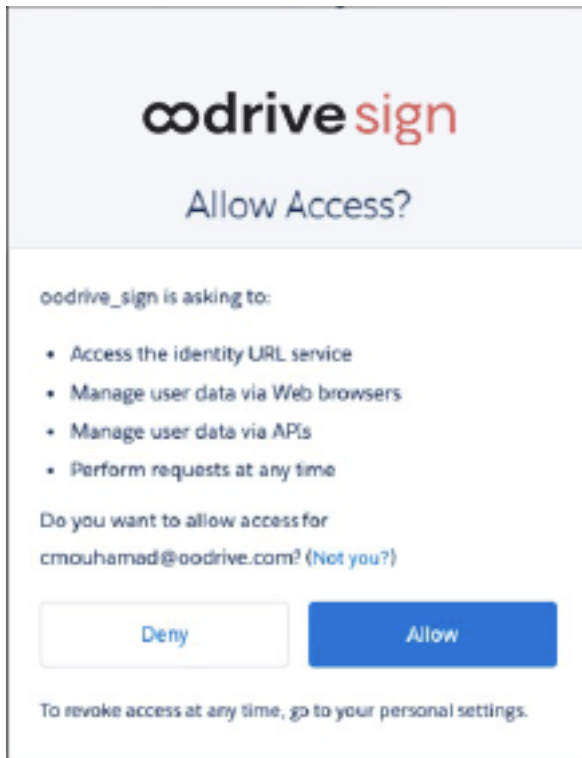
2. Click on the **Allow to connect to oodrive_sign** button:



Perimeters [Allow Connection to Oodrive Sign](#) [Synchronize All](#)

Key	Description	Custom Metadata
hub.selling.perimeter.default_perimeter.name	hub.selling.perimeter.default_perimeter.description	 
Sales	Sales	 

3. A new tab will be opened to request permission to connect to your org. Click on the **Allow** button.



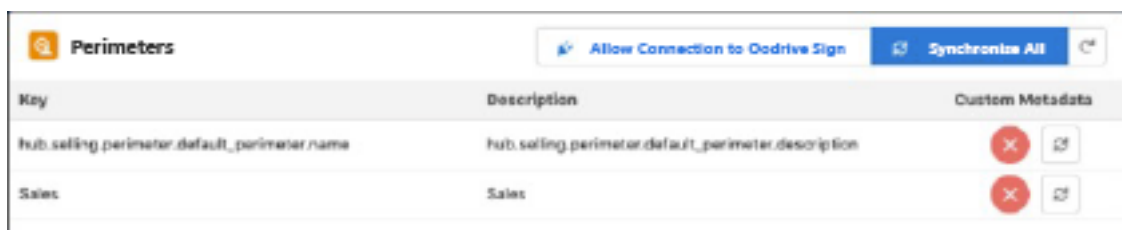
4. Then you will be redirected to this following URL :

https://www.sellandsign.com/fr/services/oauth2/callback?code=aPrxZqn0Gc.vJDDnpX.E91vASzN6.bkTBy.TjtlopSc05IDJk6z2MkpP1Py0UrZEI43cAMm_kQw%3D%3D

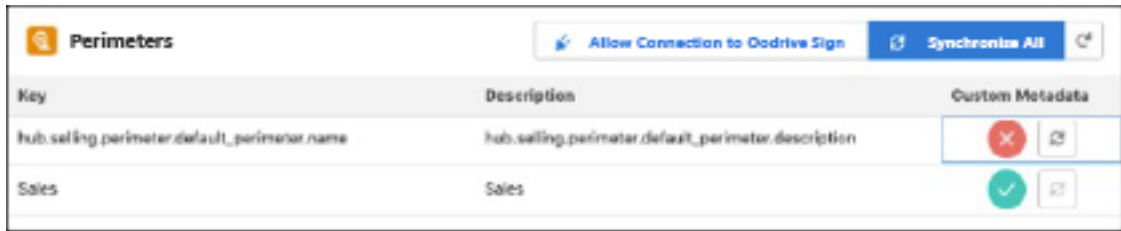
5. Send the value of the **code** parameter to the oodrive_sign team so that they can configure authentication with the OAuth 2.0 protocol to your Salesforce org.

4. Perimeters

1. On the **Perimeter** tab, click on the **Synchronize All** button to synchronize all the perimeters:



2. You can also choose only one perimeter so synchronize and click on the reload button icon to check for new Perimeters:



3. In Custom Settings, click **Manage** in front of the **Perimeter** line and then click on the **New** button.

- You can either assign the same perimeters to all users of the org:

- or assign them by profile or by user :

- Fill in the **Assigned Perimeters** field with the Perimeter API names, separated by a semicolon.

5. Contract Definition & Signature Mode

1. On the **Contract Definition List** tab, click on the **Synchronize All** button to synchronize all the Contract Definitions:

Contract Definition Synchronize All						
Id	Name	Min Contractor	Max Contractor	Custom Metadata		
> 27353	CERFA (TVA Réduite)	1	1			
> 23439	DEFAULT	1	100			
> 28146	Test	1	1			

- Click a second time on the **Synchronize All** button to synchronize all the Signature Modes for each Contract Definition:

Contract Definition Synchronize All						
Id	Name	Min Contractor	Max Contractor	Custom Metadata		
27353	CERFA (TVA Réduite)	1	1			
117316	INSTANT_PAD_SP					
117317	MAIL_OTP_SP					
117318	GATHER_SP					
117319	DIALOGUE_OTP_SP					
117320	INSTANT_OTP_SP					
23439	DEFAULT	1	100			
96103	INSTANT_OTP_SP					
96104	INSTANT_PAD_SP					
96105	MAIL_OTP_SP					
96106	CARBON_COPY					
96107	PREVALIDATE					
96108	GATHER_SP					
28146	Test	1	1			
124843	INSTANT_OTP_SP					
124844	INSTANT_PAD_SP					
124845	MAIL_OTP_SP					
124846	GATHER_SP					

- Click on the reload button icon to check if all the records are well synchronized:

Contract Definition

Synchronize All

Id	Name	Min Contractor	Max Contractor	Custom Metadata
27353	CERFA (TVA Réduite)	1	1	
117316	INSTANT_PAD_SP			
117317	MAIL_OTP_SP			
117318	GATHER_SP			
117319	DIALOGUE_OTP_SP			
117320	INSTANT_OTP_SP			
23439	DEFAULT	1	100	
96103	INSTANT_OTP_SP			
96104	INSTANT_PAD_SP			
96105	MAIL_OTP_SP			
96106	CARBON_COPY			
96107	PREVALIDATE			
96108	GATHER_SP			
25188	Test	1	1	
124843	INSTANT_OTP_SP			
124844	INSTANT_PAD_SP			
124845	MAIL_OTP_SP			
124846	GATHER_SP			

6. Smart Fields

1. In Custom Metadata Types, click **Manage Records** in front of the **Signature Mode** line.
2. You can see the list of all required fields to send the e-sign request:

Action	Label ↑	Smart Field Name	Objet	Particule	Is Mandatory	Namespace Prefix	Protected Component
Edit	address_1	address_1	Account	Billing Street	✓	sellandsign	☐
Edit	cell_phone	cell_phone	Contact	Mobile Phone	✓	sellandsign	☐
Edit	city	city	Account	Billing City	✓	sellandsign	☐
Edit	country	country	Account	Billing Country	✓	sellandsign	☐
Edit	email	email	Contact	Email	✓	sellandsign	☐
Edit	firstname	firstname	Contact	First Name	✓	sellandsign	☐
Edit	lastname	lastname	Contact	Last Name	✓	sellandsign	☐
Edit	postal_code	postal_code	Account	Billing Zip/Postal Code	✓	sellandsign	☐

3. You can override them by creating a new record with the same Developer Name.

You can also add your own mapping:

Smart Field Edit
Save Save & New Cancel

Information
! = Required Information

Label
Smart Field Name ⓘ

Objet
Particule

Protected Component ☐ ⓘ

Namespace Prefix

Is Mandatory ☒

Save Save & New Cancel

7. Documents and Appendices

1. **Documents** are attachments at the Salesforce object level in PDF format or Files in the shared library specified in the **Environment Settings**.
2. **Appendices** are attachments at the Salesforce object level or Files in the shared library specified in the **Environment Settings**.
3. Files should be **smaller than 2 MB**.

8. Standard Object configuration

There are built-in features for these standard objects:

- Account
- Contact
- Opportunity
- Contract
- Order
- Quick Action with the label Sign with oodrive_sign, that you can add in the Page Layouts or Lightning Record Pages.
- **Related List** with the label **E-Sign**, that you can add to your **Page Layouts** and customize the columns, the sort order, and the buttons. We recommend:
 - adding at least the following columns: E-Sign Name, Contract Status, Created Date,
 - sorting by Created Date in Descending order,
 - removing all the standard buttons.
- **Custom Object** with the label **E-Sign**, that is used to track the signature status.
- **Custom Object** with the label **Contractor**, that is used to track the signing party status.

9. Custom Object configuration

1. To start the electronic signature process from your Custom Object, you must first create this **Quick Action**:

The screenshot shows the 'Enter Action Information' dialog box in Salesforce. The fields are as follows:

- Object Name:** Contractor
- Action Type:** Lightning Component
- Lightning Component:** sellandsign:LC001_RemoteSigning
- Height:** 0%
- Standard Label Type:** --None--
- Label:** Sign with oodrive_sign
- Name:** Sign_with_oodrive_sign
- Description:** (empty)
- Icon:** Change Icon

Buttons: Save, Cancel (top right and bottom center).

2. On the **E-Sign** Custom Object, create a new **Lookup Relationship Field** related to your Custom Object.

3. On the **Page Layout** of your Custom Object, add the previously created **Quick Action** and Related List of **E-Sign** with your customization.
4. If your Custom Object has no Lookup Field related to the **Account** object or the **Contact** object, you must specify the custom path to the Account of the Contacts, who will be the recipients of the signature request, from your custom object:
 - a. In Custom Metadata Types, click **Manage Records** in front of the **Account Path** line.
 - b. Create a new record:
4. for the **Object** field, select your Custom Object,
5. for the **Lookup Relation** field, enter the path to the account from your custom object (e.g. Opportunity r.AccountId).

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