

Namirial eSignAnyWhere Electronic Signature for Salesforce

User Guide

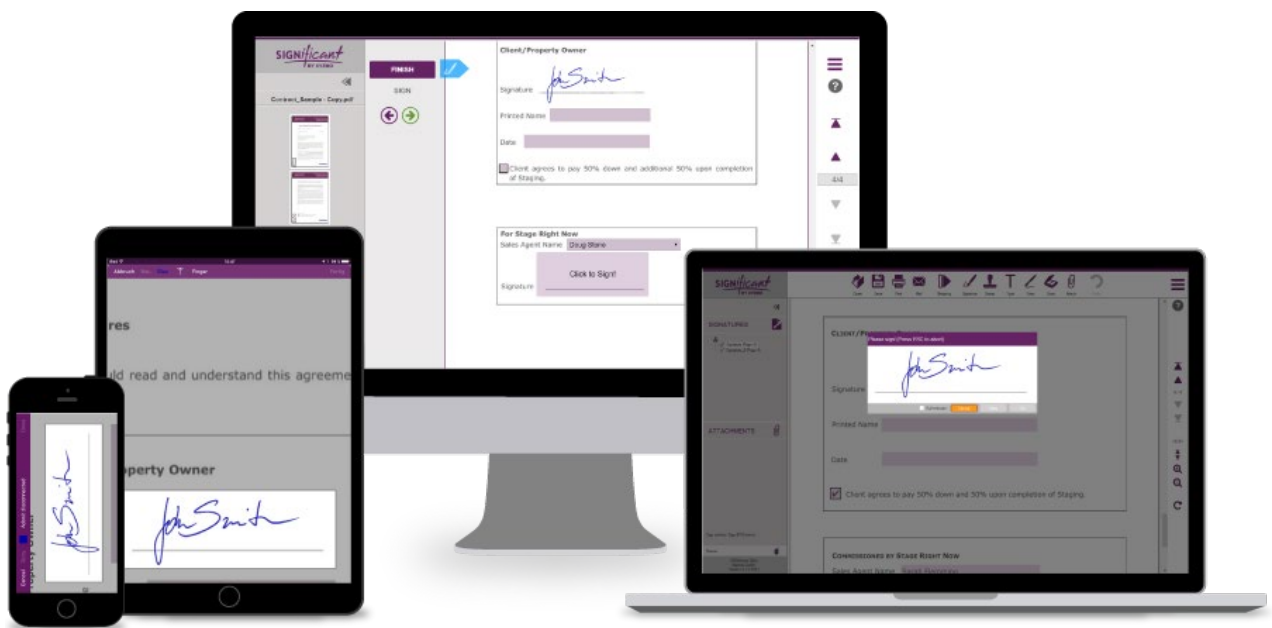


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1. Overview

Namirial eSignAnyWhere – Electronic Signature for Salesforce (e-Signature) offers a plug-and-play integration solution between with Salesforce and eSignAnyWhere, solution for Digital Transaction Management developed by Namirial GmbH.

This integration provides the following benefits:

- Accelerates the quote-to-cash process by sending envelopes, such as Contacts and Accounts documents, from Salesforce with single click
- Automatically merges data from any Salesforce object into envelope and pushes data gathered from signers during the signing process back to Salesforce
- Provides document designer to manager form fields and signature fields directly on documents
- Generates recipients based on existing leads, contacts, accounts (or any other Salesforce object)
- Enables to send Salesforce-generated reports as envelope documents
- Makes it easy for recipients to sign anywhere, anytime, on any device
- Makes it possible to track and control signing process from within Salesforce

With all enlisted benefits, eSignAnyWhere app represents one of the most advances and easiest to use Salesforce applications for electronic signatures. eSignAnyWhere developed by Namirial GmbH takes care of confidentiality and security of sent envelopes, as well as meeting regulations of most of the countries which recognize electronic signatures as legally valid signature. Scope of the product covers not only click, draw and type to sign, but also various authentications and biometric signatures. Combining security and efficiency of eSignAnyWhere with data from Salesforce produces powerful tool for accelerating sales processes.

In this guide, all functionalities of Namirial eSignAnyWhere – Electronic Signature for Salesforce (e- Signature), or just referred as eSignAnyWhere app, are covered with detailed explanations, use cases and screenshots. Those functionalities include:



- Application navigation and Home page
- Application Settings configuration
- User Settings configuration
- Envelope management (create/read/update/delete operations, document management, recipient management, actions on envelope)
- Data mapping and envelope template management
- Recipient Sources management

Topics that are out of the scope of this guide are topics on initial installation and configuration of the application. Topics of downloading from AppExchange and installing eSignAnyWhere app, obtaining valid licenses and configuring permission sets for Salesforce users are part of Installation guide.

2. Application Navigation

After installing eSignAnyWhere from AppExchange and assigning appropriate permission sets to Salesforce users, the app becomes available in Salesforce organization. eSignAnyWhere application is available by App Launcher.

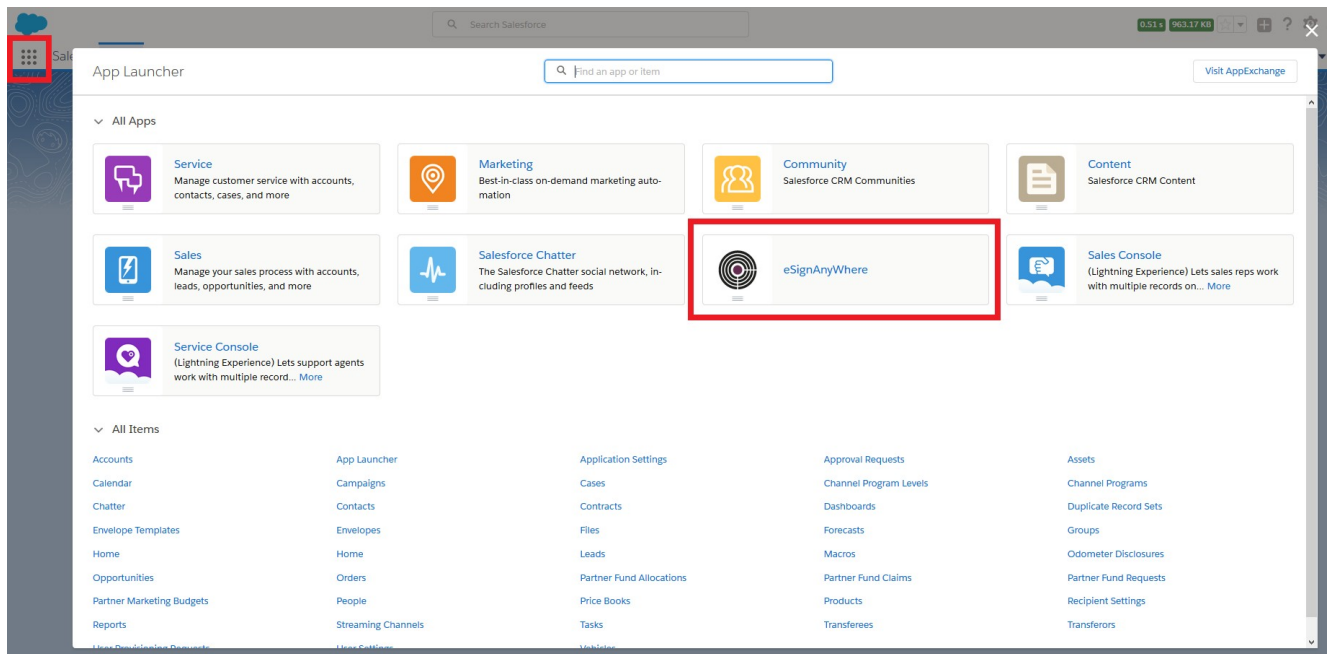


Figure 1 - App Launcher with eSignAnyWhere application

Application consists of several tabs and their final number depend on user's permission set. Namirial User can see following tabs:



- **Home:** tab containing introductory and statistical information on application ("Home" section of user guide)
- **Envelopes:** object's tab used for envelope management (sections: "Managing Envelope", "Managing Recipients", "Managing Documents", "Actions on Envelope")
- **User Settings:** tab used for registering Salesforce user and defining default values for envelopes (section "Configuring User Settings")
- **Envelope Templates:** tab used for managing records of custom object Envelope template (section "Managing Envelope Templates")

Salesforce user with permission set of Namirial Administrator can also access all of these tabs. Additionally, these users can access these tabs as well:

- **Application Settings:** tab used for registering Salesforce organization and validating license keys (section "Configuring Application Settings")
- **Recipient Settings:** tab intended for management of recipient sources (section "Managing Recipient Sources")



3. Home

First tab that is available in eSignAnyWhere application is Home tab. It is basically the landing page of the application. It contains the following sections:

- About section containing basic information on Namirial GmbH and the link to <https://www.xyzmo.com/aboutus> portal
- Pie chart showing distribution of envelopes by their current status. It is automatically generated based on corresponding report
- The list of envelopes sorted by their name
- Graph showing the distribution of envelopes by the month in which they were created. The graph is automatically generated based on corresponding Salesforce report

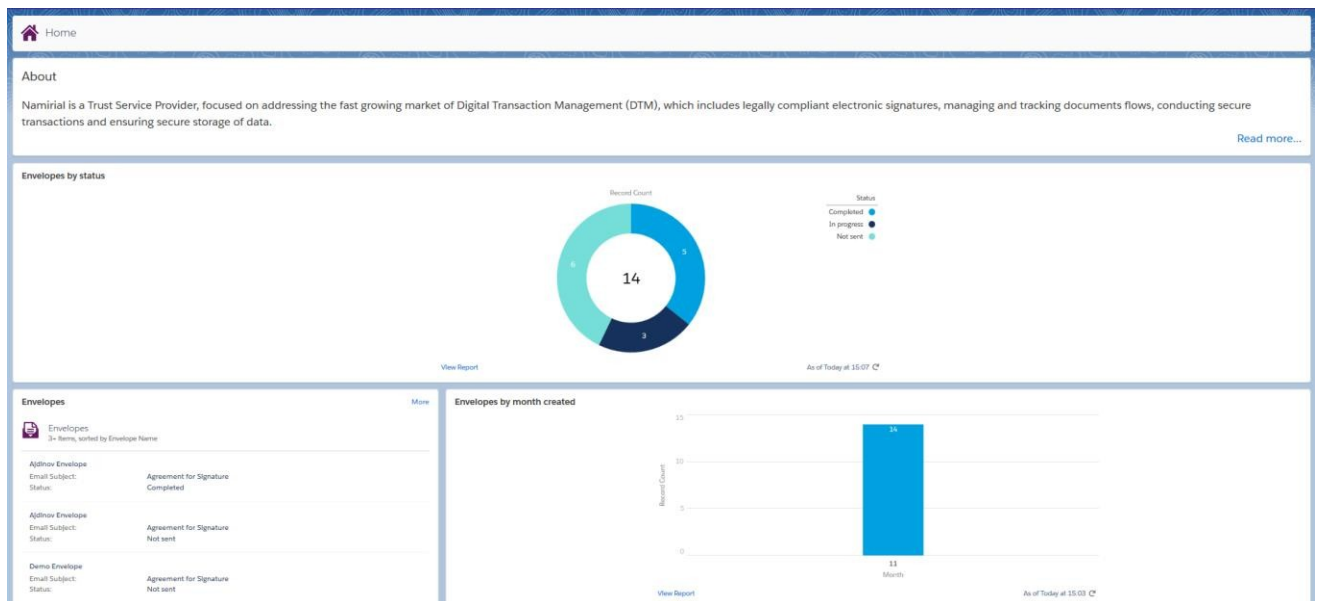


Figure 2 - Home tab



4. Configuring Application Settings

First prerequisite of using eSignAnyWhere application is to configure Application Settings. The only users who are permitted to configure Application Settings are users with Namirial Administrator permission set. Only these users can access Application Settings tab.

Clicking on "Application Settings" tab opens page with 3 fields:

- a. Organization Key – obtained by Namirial. It can be found on website: <https://www.significant.com/Organization/Edit>, in field "Application Key"
- b. User Login Name – email address used to register on <https://www.significant.com> platform. It can be found on the same link, in field "Email".
- c. License Key - obtained by CompuSight.

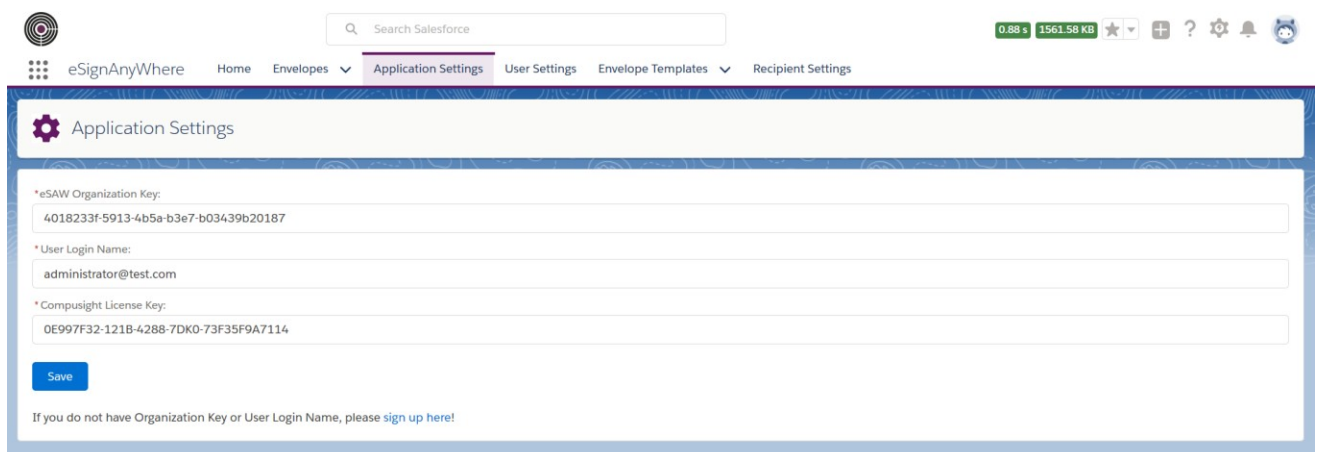


Figure 3 - Page for configuring Application Settings

After filling these fields, click on Save button. If credentials are correct, the organization will be registered to use eSignAnyWhere. Each application-related callout will be accompanied with these credentials. Also, each additional click on "Save" button will update the credentials.

These credentials are unique for whole organization, meaning that they are shared among all users. All users with the permission set of Namirial Administrator are seeing the same set of credentials.

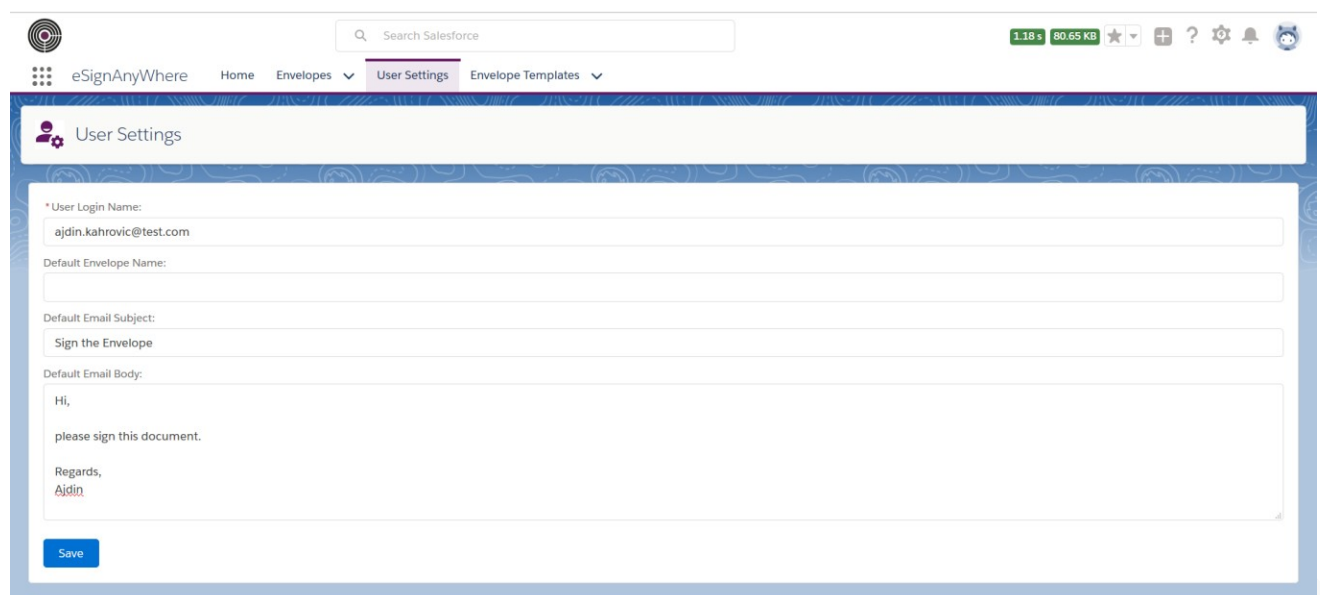
Together with registering to use eSignAnyWhere application, "Save" button triggers scheduled job in Salesforce organization that performs update action (more details under "Actions on Envelope" section of this guide) every hour on envelopes that are in

progress status. Further on, it adds three default Recipient Sources: Leads, Contacts and Users, unless they are manually added before (more details under “Managing Recipient Sources”).

5. Configuring User Settings

Next step before starting to use the application is to configure User Settings. Every user with the permission set of Namirial Administrator or Namirial User can access page for configuring User Settings by clicking on tab “User Settings”. This would open the page with 4 fields:

- a. User Login Name – unique identifier of the user for specific organization. It should be in form of e-mail address and will be used to identify the sender.
- b. Default Envelope Name – value entered in this field will be used as prefilled value of field
 - a. “Envelope Name” when creating new envelope
- c. Default Email Subject – value entered in this field will be used as prefilled value of field “Envelope Subject” when creating new envelope
- d. Default Email Body – value entered in this field will be used as prefilled value of field “Envelope Body” when creating new envelope



The screenshot displays the 'User Settings' page within the eSignAnyWhere application. The page is part of a Salesforce interface, as indicated by the search bar and navigation tabs. The settings are configured for a user named 'ajdin.kahrovic@test.com'. The 'Default Envelope Name' field is currently empty. The 'Default Email Subject' is set to 'Sign the Envelope', and the 'Default Email Body' contains a simple greeting and signature: 'Hi, please sign this document. Regards, Ajdin'. A blue 'Save' button is located at the bottom left of the form.

Figure 4 - Page for configuring User Settings

After filling these fields, click on Save button. It would store new data or update existing. This set of data is specific for every user in the organization. User Settings can't be read or shared among the users.

When the new user is entered here, he will receive the confirmation e-mail and temporary password in it. User can use his/her e-mail address (User Login Name) and temporary password to login to significant.com portal where he/she can make further changes to the account settings and manage all processes available in Salesforce directly on the portal. This will also reserve seat for this user, under current license of the organization.

6. Managing Envelope

First step of using eSignAnyWhere is to click on tab envelope and then click button "New"



Figure 5 - Button new on list of All Envelopes

It would open a pop-up for creating envelope which appears as shown below:



Figure 6 - Pop-up for creating new envelope

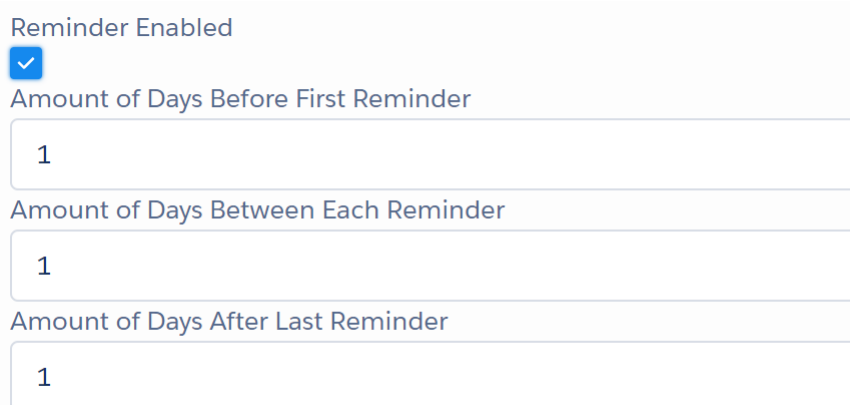
The pop-up consists of the form containing following fields:

- **Envelope Name:** the value in this field will serve as internal unique identifier of each envelope. It is prepopulated with the value from field "Default Envelope Name" on User Settings page which is specific for every user in Salesforce.
- **Email Subject:** the subject of the email that is sent to recipients of the envelope. It is also prepopulated with the value from field "Default Email Subject" on User Settings page which is specific for every user in Salesforce.
- **Email Body:** multiple-line field with the value that represents the body of the email that will be sent to recipients of the envelope. It is also



prepopulated with the value from field “Default Email Body” on User Settings page which is specific for every user in Salesforce.

- **Reminder Enabled:** checking this checkbox means that the recipients of the envelope will receive emails as reminders to sign the envelope. If this checkbox is checked, three additional fields will appear, as shown below:



Reminder Enabled

Amount of Days Before First Reminder

1

Amount of Days Between Each Reminder

1

Amount of Days After Last Reminder

1

Figure 7 - Additional fields if reminders are enabled

- **Amount of Days Before First Reminder:** this field defines the number of days that will need to pass before first reminder is sent to next recipient. This field will only accept whole positive numbers and the amount of days needs to be smaller than amount of days before expiration.
- **Amount of Days Between Each Reminder:** this field defines the number of days between each reminder sent to next recipient. This field will only accept whole positive numbers and the amount of days needs to be smaller than amount of days before expiration and smaller than 10 days.
- **Amount of Days After Last Reminder:** this field defines the number of days between the last reminder sent to next recipient in row for signing and the expiration of the envelope. This field will only accept whole positive numbers and the amount of days needs to be smaller than amount of days before expiration.
- **Days until expiration:** the value in this field defines number of days in which the envelope can be signed by all recipients. If all recipients do not sign the envelope in this period, envelope’s status changes to “Expired” and the envelope cannot be



signed anymore. The field only accepts positive whole number, where 2 is minimum and 28 is maximum value.

- **Preview, position signatures and fields:** If this checkbox is checked, designer will be opened just before envelope is sent for signing (after click on button "Send). In designer, envelope sender can add/modify/reposition/remove form fields and signatures.
- **Signature Type:** As Significant platform allows different ways of signing documents, the envelope sender can determine the preferred method of signature. Possible values for this field are: "Type2Sign", "Click2Sign", "Draw2Sign", "Remote Signature", "Biometric Signature", "Local Certificate Signature" and "Disposable Certificate". Each of these methods is described on this link: <https://content.signanywhere.com/support/signer-guide/>



When you finish filling the fields, “Save” button should be clicked. If all required fields are filled and no error occurs, you should be redirected to record page of newly created envelope. It should appear like this:

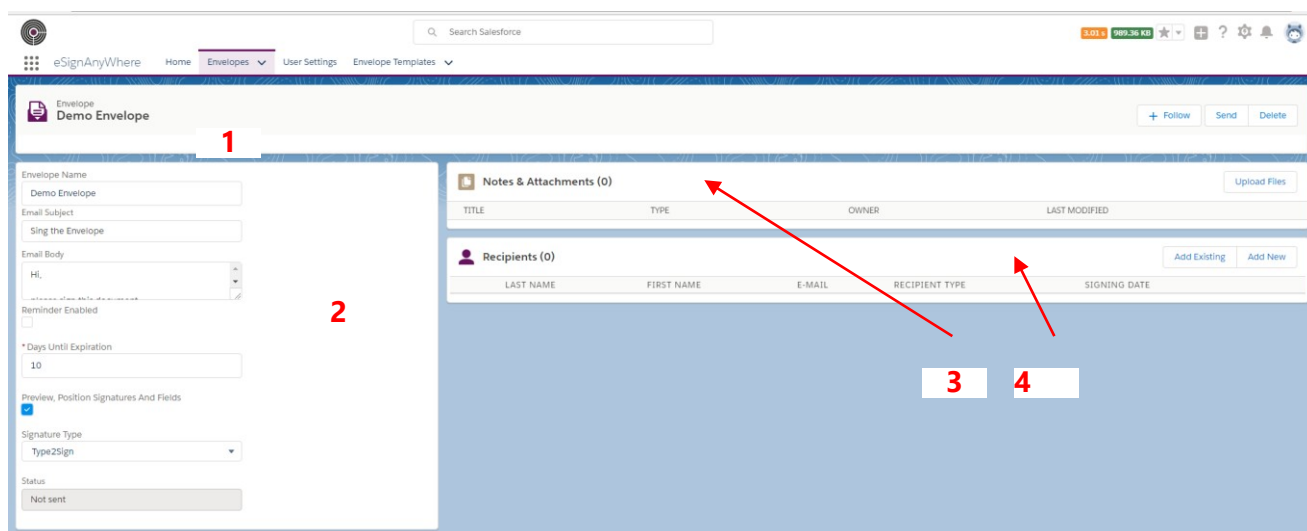


Figure 8 - Envelope record page

Record page consists of four main parts:

1. Ribbon on the top containing envelope name on the left side and all quick action buttons on the right side
2. Left section containing details about envelope
3. Right upper section containing the list of documents (Notes and Attachments)
4. Right lower section containing the list of recipients related to this envelope

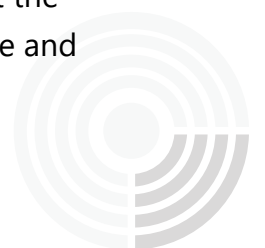
This guide will explore envelope details (2) in this section and then address options and ways of usage of other three sections: managing recipients (4), managing documents (3) and finally actions on envelope (1).

Envelope details contain all data entered on the previously seen popup. The only additional field is Status field. Status field is one of the most important fields on the Envelope, as it determines possible actions on the envelope. Users cannot change the status; the status is rather changed automatically by actions of the sender and recipients of the envelope. Envelope can be in one of the following statuses:

- **Not sent:** this is the initial status of the envelope. Envelope in status “not sent” in the envelope that is created and exists only in Salesforce – it is not sent to Significant platform yet and consequentially, not sent to any of recipients. When the

envelope is in this status, the user can change all envelope details, can add/modify/remove recipients and add/modify/remove documents. Available actions are "Send" and "Delete".

- **Draft:** Under condition that checkbox "Preview, Position Signatures And Fields" is checked, when the user clicks on "Send" action the designer opens. In the designer, user can make modifications on signatures, fields and envelope details and decide whether to send envelope instantly or to do it sometimes later. If the user doesn't send the envelope through designer and closes it, envelope will change to "Draft" status. It means that it exists on Significant platform, but it still isn't sent to recipients. Just as with "Not sent" status, the user can change all envelope details, can add/modify/remove recipients and add/modify/remove documents when the envelope is in "Draft" status. Available actions are "Send" and "Delete".
- **In progress:** When the envelope is sent, whether directly from Salesforce (checkbox "Preview, Position Signatures And Fields" is unchecked and button "Send" clicked) or through designer, status of the envelope changes to "In progress". This status means that the envelope is sent and waiting for recipients to sign it. It prevents users from making any additional change to the envelope: no recipients or documents can be added or removed, nor the envelope details can be changed any more. All envelopes in this status are automatically updated every hour. Available actions are "Update", "Cancel", "Send Reminder", "Host" and "Delete".
- **Canceled:** The envelope comes to this status when the sender of the envelope clicks on the button "Cancel". The next recipient in the row for signing receives the notification that the envelope is canceled and cannot be signed. All changes to envelope are again being prevented. The only available action is "Delete".
- **Rejected:** The envelope gets to this status when the recipient who is the next in the row for signing, rejects the envelope instead of signing it. The users cannot make any further changes to the envelope. The only available action is "Delete".
- **Expired:** Envelope gets expired when the number of days between date of sending the envelope and the current date exceeds the value from field "Days Until Expiration" and the envelope is not signed by all users. In this status, all changes to envelope are still locked and two actions are available: "Restart" and "Delete". When the "Restart" button is clicked, the envelope returns to "In progress" status.
- **Complete:** This is the final and desired state of the envelope. It means that the envelope is sent and all recipients signed it. All fields are locked in this state and the only available action is "Delete" action.



State diagram of the envelope would look like this:

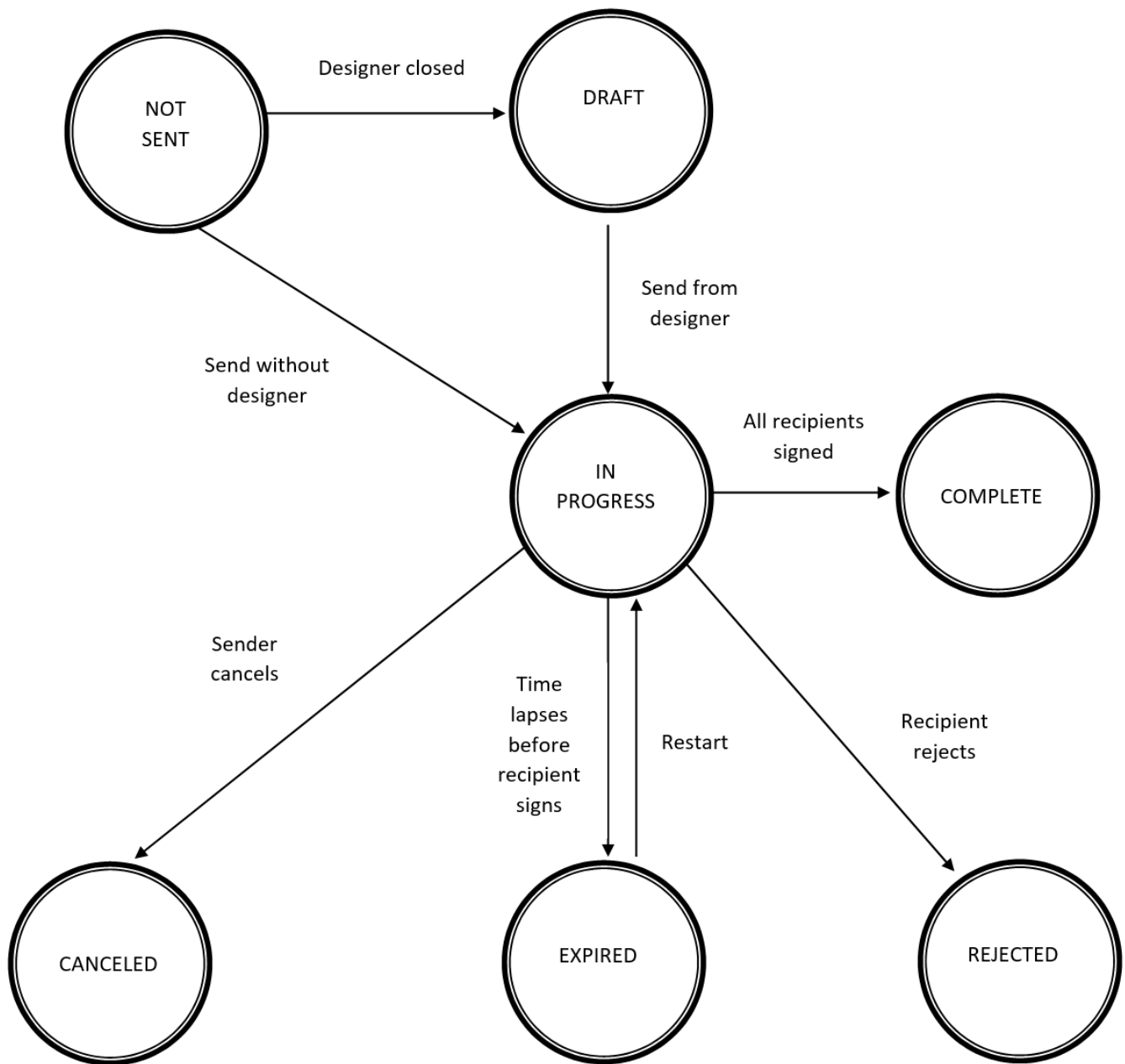


Figure 9 - State diagram for envelopes



Besides "Status" field, some other fields can appear as well in Envelope details section of the record page.

If the envelope is in statuses of "In progress", "Canceled", "Expired", "Rejected" or "Complete", following fields will appear:

- **Date of Sending:** the field keeps the date and time of sending the envelope. It is filled when the envelope is sent.
- **Date of Expiration:** the field keeps the date and time of envelope expiration, calculated based on
- field "Days Until Expiration". It is filled when the envelope is sent.
- **Date of Completion:** the field keeps the date and time of completion of the envelope. It is filled when the envelope is completed.

All three fields are disabled for editing and are only used to display information to the user. Besides these three fields, field "Envelope template" might also appear with the list of all existing envelope templates in Salesforce. More details about this can be found in the "Data Mapping" section of the guide.

With change made in any of the fields within Envelope Details section, ribbon in the lowest part of the record page will appear containing the button "Save" which saves changes made to the envelope. Keep in mind when the user clicks on "Send" button, all unsaved changes will be automatically saved and the envelope will be sent with regards to those changes.

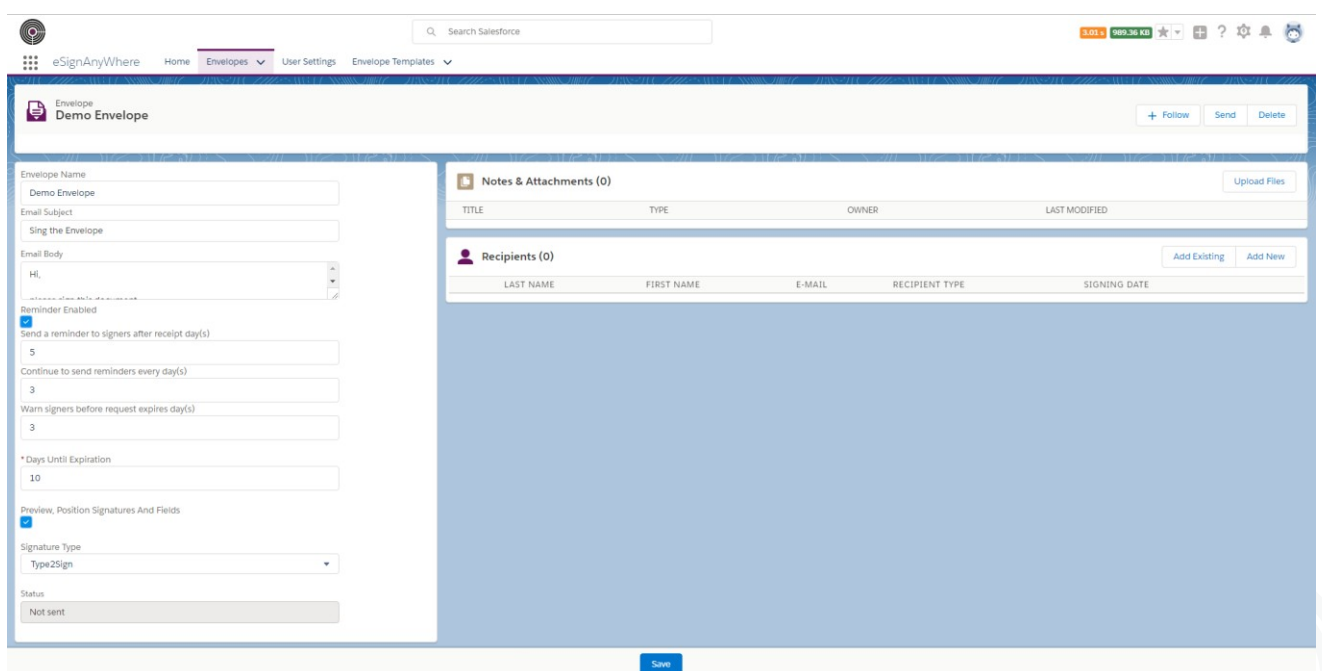


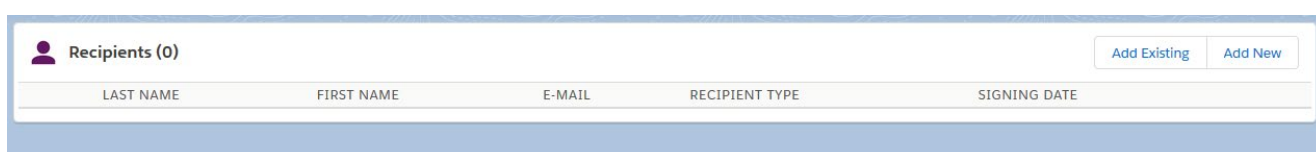
Figure 10 - Envelope record page with footer containing "Save" option

7. Managing Recipients

After creating envelope and defining its fundamental details, next step would be to add recipients. In the lower right frame on the envelope's record page, there is the list of currently added recipients. If you have created the envelope from the tab, the list should be empty. If created from certain record page, by clicking on "Send for signature" and if the recipient source is created for the respective object, one recipient should be added automatically. Recipients added to the envelope are shown in table, where each recipient is shown in one row. The table contains following columns:

- **Order column:** column containing buttons for moving recipient up and down in the row of signing. Buttons will be visible only if there are more than one recipients and if the envelope is in "Not sent" or "Draft" status.
- **Last Name:** last name of the recipient
- **First Name:** first name of the recipient
- **Email:** e-mail address of the recipient. Value entered in this field needs to follow valid format of e-mail address. Envelope will be sent to this e-mail address.
- **Recipient Type:** this field determines whether the recipient will be added as signer or he/she will receive the envelope as a carbon copy.
- **Signing Date:** date and time when the recipient signed the envelope. It will appear automatically with update of the envelope, under condition that recipient signed the envelope.
- **Action column:** column containing down arrow icon (if recipient actions are available for the envelope). Click on the icon will open the menu with two possible actions on the recipient: Edit and Delete.

There are two buttons which can be used to add recipients. First one is "Add Existing" and second one is "Add New". "Add Existing" button will open dialog for adding recipients based on existing Salesforce records such as leads or contacts. On the other side, "Add New" button will open dialog for creating new recipient from the scratch – by entering his/her name and e-mail address. Important notice is that these buttons are only visible if the envelope is not sent or if it is in "draft" status. Otherwise, if the envelope is already sent, new recipients can't be added.



Recipients (0)					Add Existing	Add New
LAST NAME	FIRST NAME	E-MAIL	RECIPIENT TYPE	SIGNING DATE		

Figure 11 - Part of envelope record page containing the list of recipients

8. Adding recipients based on Salesforce records

Let's first explore "Add Existing" option. Clicking on button "Add Existing" opens dialog for selecting recipients.

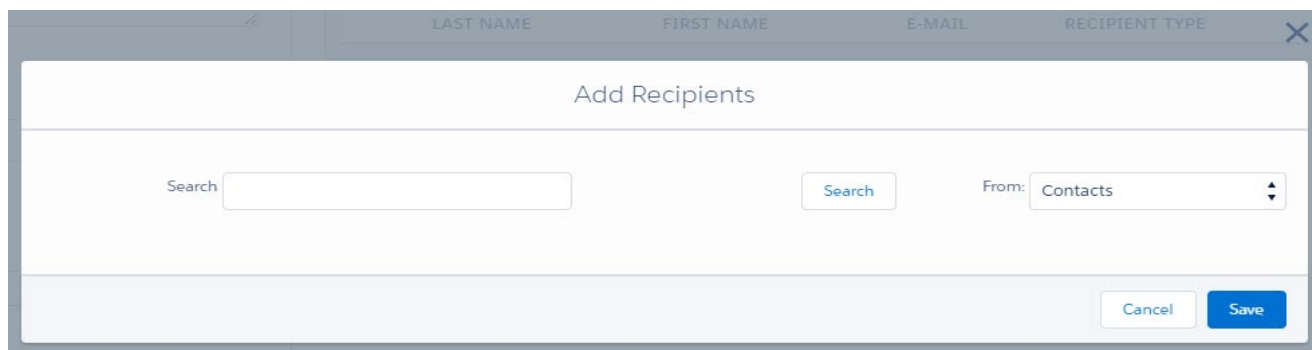


Figure 12 - Dialog for adding recipients based on existing Salesforce records

Recipients can only be selected from the list of configured recipient sources, which is done under tab "Recipient Settings". Recipient sources are Salesforce built-in or custom objects whose records can be converted to recipients using this dialog. Configuration of a recipient source means choosing Salesforce object and determining which fields of that object will serve as first name, last name and e-mail address of the recipients. By default, three recipient sources are configured: Lead, Contact and User. This means that, without any additional configuration, recipients can be selected from contacts, leads or users existing in Salesforce organization. To enable using other objects such as accounts or some custom object as recipient sources, additional configuration is required. This is explained in further details under section "Managing Recipient Sources". Additional restrictions on selection of records of recipient sources which are to be added as recipients are:

- Record of recipient source needs to have value in e-mail address field
- Value in e-mail address field needs to correspond to format of e-mail address

Restrictions are enforced whether as hiding records whose addition would violate restrictions or with error message if attempt to do so is made.

The list of potential recipients could be additionally filtered by keyword entered in "Search" field. If the keyword is entered, records of recipient sources will be visible if the entered keyword is contained in the first name, last name or e-mail address of the record.

SELECT	LAST NAME	FIRST NAME	E-MAIL	RECIPIENT TYPE	SIGNATURE FIELD NAME
<input checked="" type="checkbox"/>	Braund	Mike	likeb@metro.com	Signer	
<input type="checkbox"/>	Brownell	Shelly	shellyb@westerntelecom.com	Signer	
<input checked="" type="checkbox"/>	Crenshaw	Carolyn	carolync@aceis.com	Signer	
<input type="checkbox"/>	Haskovic8	Nedzad8	ajdin.kahrovic@compusight.com	Signer	
<input type="checkbox"/>	Rogers	Jack	jrogers@btca.com	Signer	

Figure 13 - Selecting Salesforce records for creating new recipients

For each potential recipient, first name, last name and e-mail address are shown as locked fields which can't be changed. There are also two additional fields for each of them: Recipient Type and Signature Field Name. Recipient Type determines whether the recipient will be added as signer or he/she will receive the envelope as carbon copy. Also, recipient should have unique signature field on document and "Signature Field Name" is used to enter the name of that signature field. It should correspond to the name of signature field existing on added documents to the parent envelope. This option is used to associate signature fields with recipients before sending the envelope.

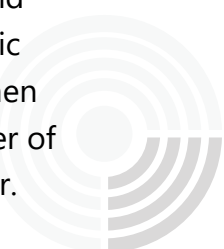
A recipient is selected by clicking on checkbox at the beginning of its row (column "Select"). In one iteration, multiple recipients can be added by selecting all desired recipients and clicking on "Save" button. Otherwise, to cancel all changes, click on button "Cancel". Both buttons will close dialog and if changes are made, newly added recipients will be visible on the list on main record page of the envelope.



9. Adding recipient from scratch

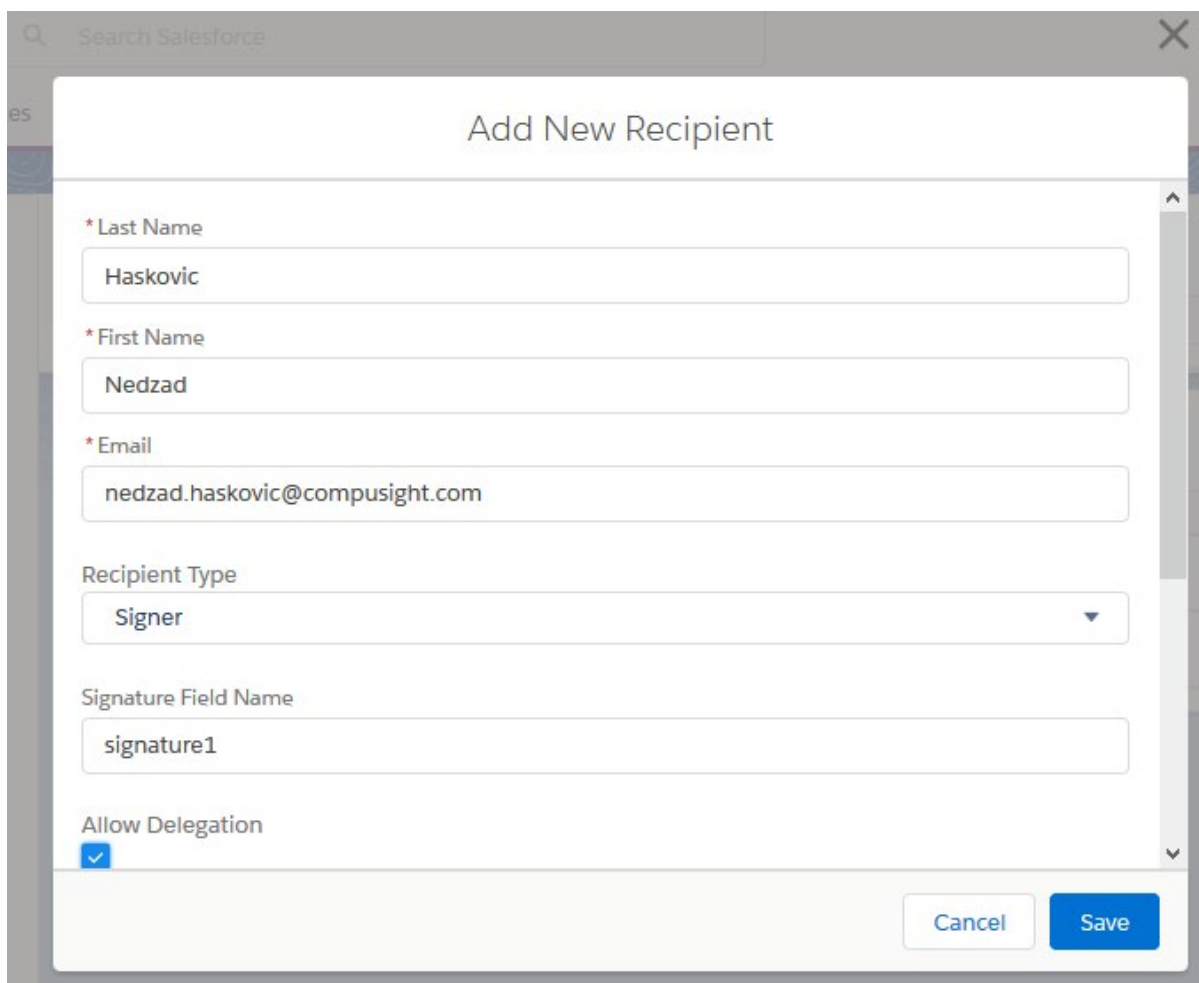
Another approach to adding recipient is to create it from scratch, without referencing existing Salesforce records. Click on button “Add New” will open dialog for filling data about recipient. This option supports only adding one by one recipient. Dialog will appear as shown on picture and will contain following fields:

- **Last Name:** last name of the recipient
- **First Name:** first name of the recipient
- **Email:** e-mail address of the recipient. Value entered in this field needs to follow valid format of e-mail address. Envelope will be sent to this e-mail address.
- **Recipient Type:** this field determines whether the recipient will be added as signer or he/she will receive the envelope as a carbon copy.
- **Signature Field Name:** value in this field should correspond to the name of signature field existing on added documents to the parent envelope. This option is used to associate signature fields with recipients before sending the envelope.
- **Allow Delegation:** checkbox which determines whether recipient will be allowed to delegate signing to another person. If this option is checked, recipient will have ability to forward envelope to person with another e-mail address. New recipient will be able to sign the envelope instead of this specific recipient.
- **Disable Email:** checkbox that determines if the recipient will receive e-mail with the link to signing interface (interface using which he/she can preview documents, fill form fields and sign the documents). If this checkbox is checked, the recipient will not receive the e-mail. In this case, the only way to sign the document is by host signing (more details under section “Actions on Envelope”, subsection “Host”).
- **Require Authentication:** this option determines whether the specific recipient will be required to authenticate before previewing and signing the document. If this option is checked, additional fields will appear:
 - **Authentication Method:** dropdown with two options: SMS and PIN. If PIN option is selected, new field will appear with label **PIN Code**. This option will require recipient to enter PIN code before previewing documents and entered PIN code needs to correspond to one specified in “PIN Code” field. Transmission of PIN Code from envelope sender to the recipient is not part of the application – it assumes that the sender and recipient are both familiar with PIN Code. Another option is SMS and if selected, it will send application- generated PIN Code to the recipient via SMS when specific recipient becomes next in the signing row. If this option is selected, then field with label **Mobile Phone Number** will appear and phone number of recipient is expected. SMS will be sent to that specified phone number.



Expected format of Mobile Phone Number is: +<Country Code> <Phone Number>.

- **Language Code:** dropdown that determines the language of the signing interface for this specific recipient. When the recipient receives the e-mail, he/she opens the link with the signing interface using which they can preview document, fill down form fields and finally sign it. Signing interface will be previewed to recipient in language selected in this dropdown. Default language is English. Important thing to keep in mind is that, even though the list contains all available languages, the only selectable are those that are manually added at significant.com platform. They can be added on Localization page: <https://www.significant.com/Localization/Index>. If the language of the recipient is not added to this list of languages, error will appear when sending the envelope.
- **Add This Recipient as Contact:** checkbox that determines if new contact will be created alongside creation of the recipient. If it is checked, when the specific recipient is created (button "Save" clicked), new contact will be created automatically as well, using first name, last name and e-mail address values.



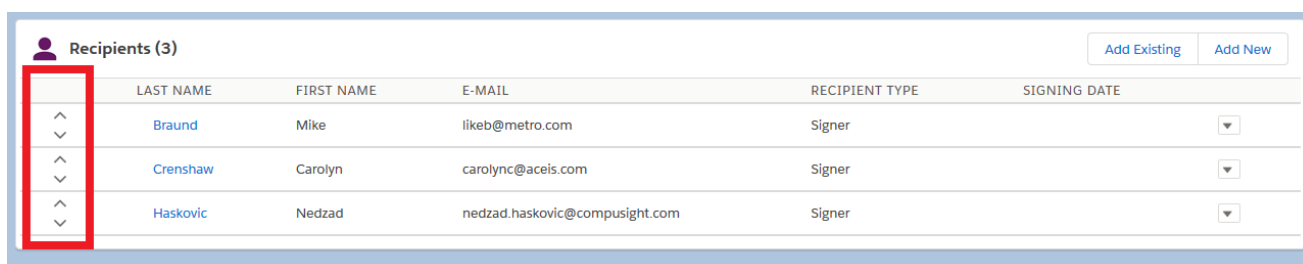
The image shows a 'Salesforce' dialog box titled 'Add New Recipient'. It contains the following fields and controls:

- * Last Name: Haskovic
- * First Name: Nedzad
- * Email: nedzad.haskovic@compusight.com
- Recipient Type: Signer (dropdown menu)
- Signature Field Name: signature1
- Allow Delegation:
- Buttons: Cancel, Save

Figure 14 - Dialog for adding new recipient from scratch

10. Reordering, editing and deleting recipients

Recipients will receive envelope for signing in the order displayed. Order can be changed by the use of arrows next to each recipient's last name. Click on up or down arrow will move recipient upper or lower in the row of signing respectively. Recipients can only be reordered if the envelope is in "Draft" or "Not sent" status.



	LAST NAME	FIRST NAME	E-MAIL	RECIPIENT TYPE	SIGNING DATE
↑ ↓	Braund	Mike	likeb@metro.com	Signer	▼
↑ ↓	Crenshaw	Carolyn	carolync@aceis.com	Signer	▼
↑ ↓	Haskovic	Nedzad	nedzad.haskovic@compusight.com	Signer	▼

Figure 15 - Reordering buttons on recipient list

Additional configuration or editing existing configuration of each recipient can be made on record page of the recipient. Record page of each recipient is accessible by clicking on his/her last name (for example: Braund or Crenshaw on picture above). Another way to access recipient details page is by clicking on down arrow icon in the last column of table with all recipients and selecting option "Edit". Both ways will open page with recipient details as shown below:

If envelope is in "Draft" or "Not sent" status, all fields will be editable except First Name, Last Name and E-mail. If there is need to edit them, recipient should be deleted and new one created from start. All other fields are editable and exactly the same as the fields on dialog for adding new recipient from scratch. Details on the meaning and valid values for each of them is explained under subsection "Adding recipient from scratch". The only additional field that appears here is locked field **Signed Date** which is used to display exact date and time when the specific recipient signed the envelope. It will be automatically filled with the update of envelope, under condition that recipient signed the envelope. If the envelope is in any other status except "Draft" or "Not sent", all fields will be locked for editing.



Recipient
Mike Braund

Last Name
Braund

First Name
Mike

Email
likeb@metro.com

Envelope Name
Demo Envelope

Recipient Type
Signer

Signature Field Name

Allow Delegation

Disable Email

Require Authentication

Language Code:
English

Signed Date

Figure 16 - Recipient record page for editing

Final action that can be performed on recipients is deleting recipient. Deleting recipient is only available if the recipient is in "Not sent" or "Draft" status. In order to delete recipient, in the list of recipients, click on down arrow icon (the last column) in the row of specific recipient and select option "Delete". It will delete recipient and this cannot be undone. Important thing to have in mind is that deleting recipient will not delete Salesforce record of recipient source (e.g. lead) based on which the recipient is created nor it will delete contact record if it is created alongside creation of recipient record (if recipient is created from scratch and checkbox "Add This Recipient as Contact" was checked).

Recipients (3) Add Existing Add New

	LAST NAME	FIRST NAME	E-MAIL	RECIPIENT TYPE	SIGNING DATE
^ v	Braund	Mike	likeb@metro.com	Signer	
^ v	Crenshaw	Carolyn	carolync@aceis.com	Signer	
^ v	Haskovic	Nedzad	nedzad.haskovic@compusight.com	Signer	

Figure 17 - Buttons for editing and deleting recipient on recipient list

11. Managing Documents

Document management is done in the upper right section of the envelope record page. It is named as “Notes & Attachments (x)”, where “x” represents the number of currently uploaded files. In order to add document to the envelope click on button “Upload Files”. It will open standard browser view of file uploader in which the user can choose one or more files from his computer to upload to Salesforce and attach to the envelope. Most standard files formats are supported.

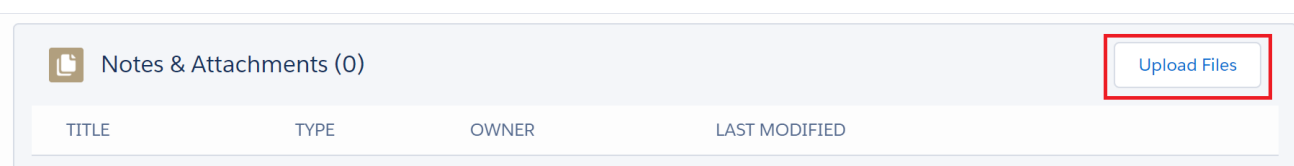


Figure 18 - Section of envelope record page for managing documents

After uploading the file from the computer, it will appear in the list shown below. For each file, information on title, type, owner (Salesforce user who owns the file) and last modified date are shown. By clicking on the title “Notes & Attachments (x)” or by clicking on “View All” link in the right bottom corner of the section, the user will be redirected to full list of all files where the additional information on the size of file is provided as well.

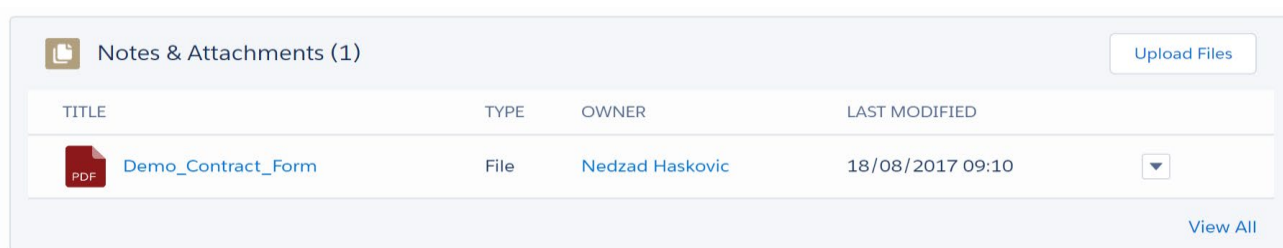
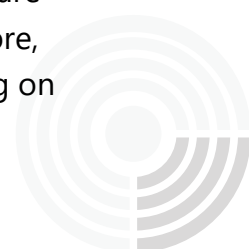


Figure 19 - Document added to the envelope

Standard Salesforce operations can be performed on each file. These options are listed when the button in the last column of the table is clicked and furthermore, they are also available from the preview of the document (accessed by clicking on document title). The options are as follows:



- **Download:** this option downloads the file to the user's computer
- **Share:** this option allows user to share the file to other Salesforce users
- **Public Link:** it creates link using which anybody outside the organization can preview and download the document
- **View File Details:** display all information relevant for specific document to user: all its versions, all users who follow it, users who have access to it, size, type, dates of creation and modifications etc.
- **Upload New Version:** allows user to upload new file under the same name and reference in Salesforce
- **Edit File Details:** allows user to change title and description of the file
- **Delete:** removes the document from the envelope and Salesforce in general

Changes on documents are only available if the envelope is in “Not sent” or “Delete” status.

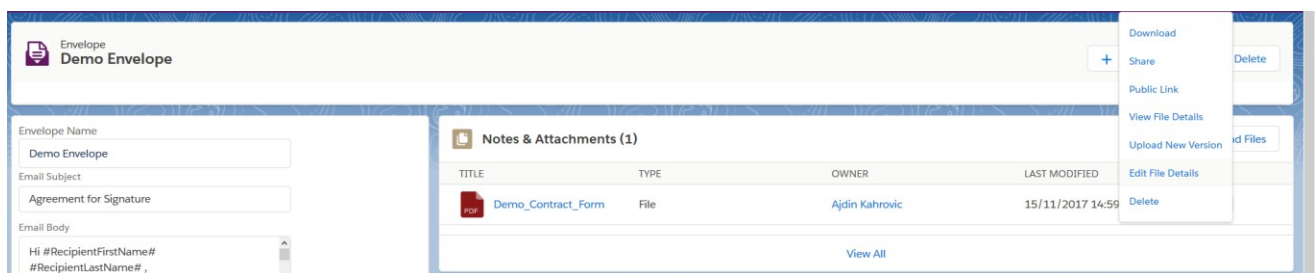


Figure 20 - Available options for every document

12. Actions on Envelope

All quick actions that can be performed on the envelope can be found on the right side of the ribbon. Every action causes envelope to change its status or it updates envelope's fields. These actions are as follows:

12.1 Send

This action can only be performed if the envelope is in status “Not sent” or “Draft”. Further prerequisites are that there is at least one recipient and at least one document added. “Send” action transfers data about envelope, recipients and documents to Significant platform with the ultimate goal to send the envelope with the documents to the recipients for signing. There are two direct outcomes of this action and they depend on the checkbox “Preview, Position Signatures And Fields”.



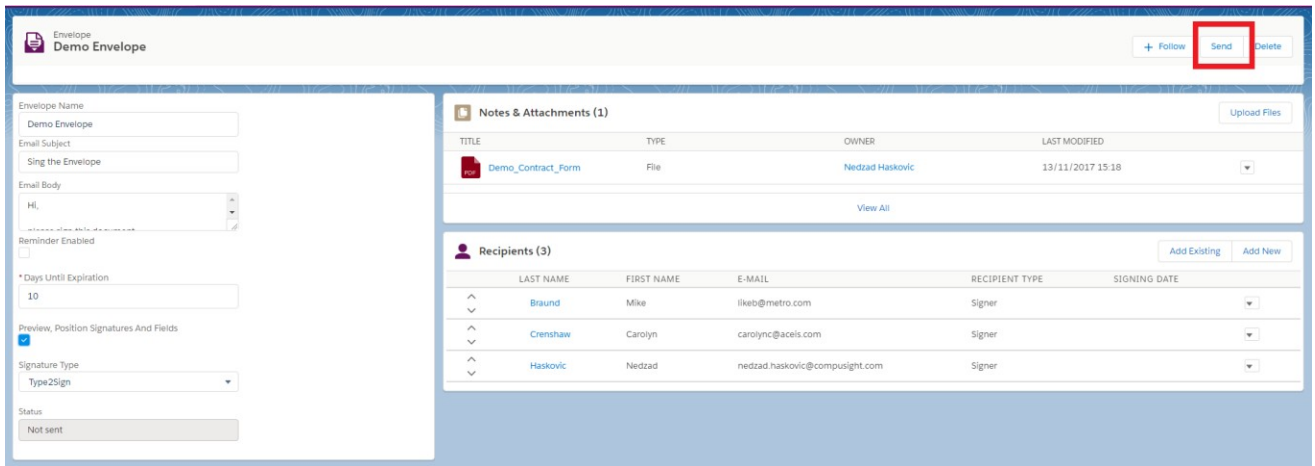


Figure 21 - Envelope record page with Send button

a. Checkbox "Preview, Position Signatures And Fields" is checked

If the checkbox is checked, when the "Send" button is clicked, if all conditions for sending are met, designer on Significant platform opens. In the designer, user can make modifications on signatures, fields and envelope details and decide whether to send envelope instantly or to do it sometimes later. Also, user can make change on any of envelope's attributes. More details on how to use designer and what options are available can be found in User guide on eSignAnyWhere website.

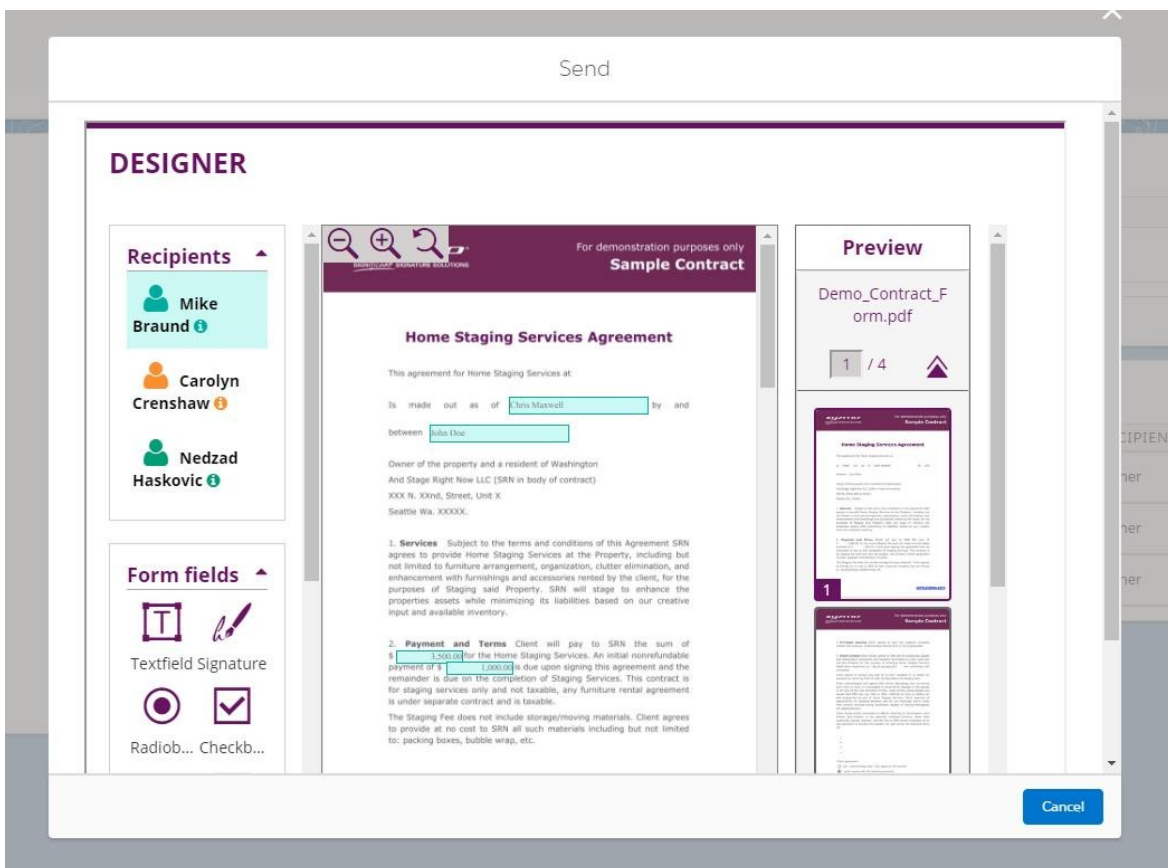


Figure 22 - eSAW designer

After making all relevant changes, user can click on "Send" button and send the envelope from the designer. After sending it, user needs to close the pop-up which would result to changing envelope's status to "In progress" and lock the envelope for any change. Alternatively, if the user doesn't send the envelope through designer and closes it, envelope will change to "Draft" status. It means that it exists on Significant platform, but it still isn't sent to recipients. Afterwards, the user can change all envelope details, can add/modify/remove recipients and add/modify/remove documents and try sending it again.

Send

Summary

Envelope Name

Demo Envelope

Recipients

Allow Recipient Delegation

Mike Braund (likeb@metro.com)	
Carolyn Crenshaw (carolync@aceis.com)	
Nedzad Haskovic (nedzad.haskovic@compusight.com)	

Messages

To: likeb@metro.com

Subject: **Sing the Envelope**

Hi, please sign this document. Regards, Ajdin

DISCARD SEND ENVELOPE

Cancel

Figure 23 - Summary of envelope data on eSAW designer



b. Checkbox "Preview, Position Signatures And Fields" is unchecked

If this checkbox is unchecked, clicking on "Send" button, if all necessary conditions are met, would result in directly sending envelope to the recipients. The user would not be able to add, modify or remove form fields nor signatures.

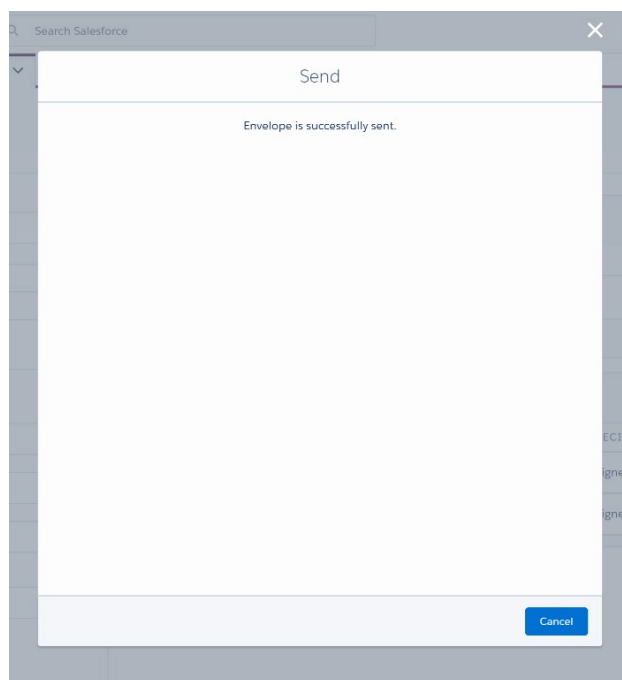


Figure 24 - Sending envelope without preview on eSAW designer

"Send" action would change the status of the envelope to "In progress" and lock the envelope for any change. Soon afterwards, first recipient in the signing row should receive the e-mail notification with the documents to sign.

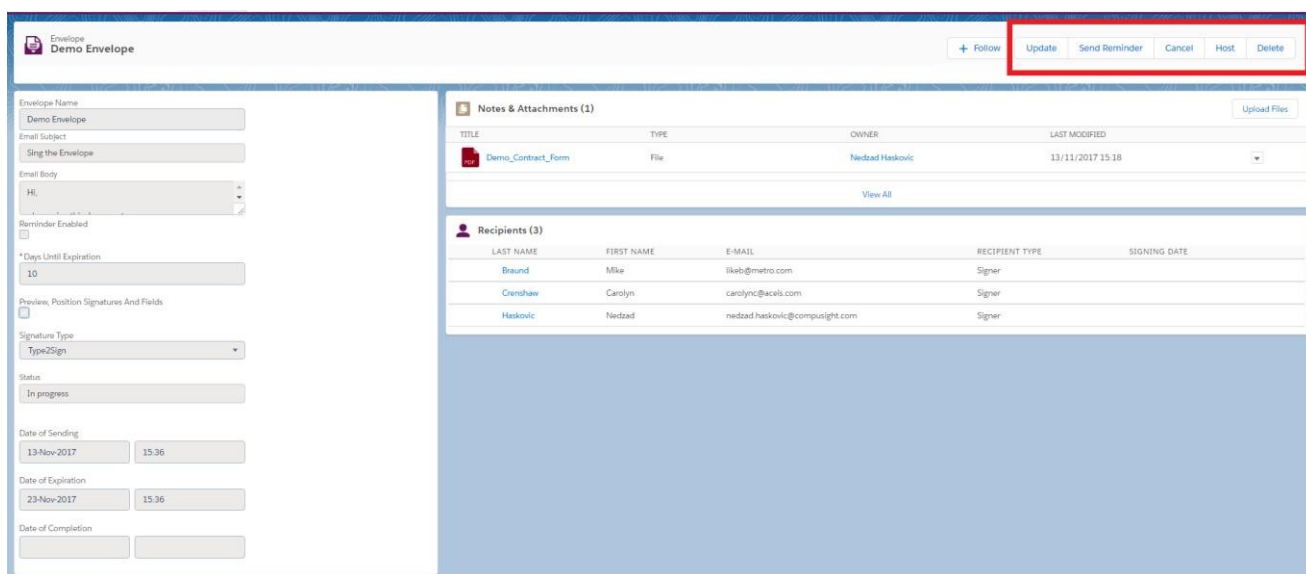


Figure 25 - Envelope record page of envelope which is in "In progress" status

12.2 Update

“Update” action is only available for envelopes which are in “In progress” status. This action will make the changes made to the envelope outside Salesforce, visible in Salesforce. It keeps track of the following changes:

- Status of the envelope. This will update the status from “In progress” to expired, rejected or complete.
- Date and time of sending and completing the envelope
- Date and time of each recipient’s signature
- Signed copy and Audit trail will be uploaded to Salesforce when the signing process is completed. These two documents will be available in “Notes & Attachments” part and can be viewed by user and managed just as any other documents in Salesforce. The first document represents all sent documents in the envelope combined in a single document with all form fields filled by recipients and with all their signatures. Second document is the trail of signing process, containing the list of all actions done by recipients.
- Updating the record in Salesforce if the form fields on the sent documents are mapped to a Salesforce record

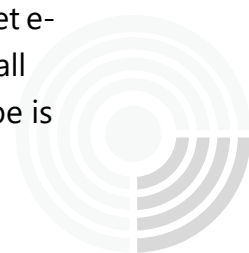
Besides the manual update, Salesforce performs automatic updates as well. Every 60 minutes, background process of automatic update is triggered for every envelope in Salesforce which is in status “In Progress”. The automatic update for all envelopes covers the same scope as the manual update for one specific envelope.

12.3 Send Reminder

This action can be called only if the envelope status is “In progress” and it sends e-mail notification to the recipient who is next in the row for signing. The e-mail notification is reminder to sign the document and has link to the signing interface. This action (manual sending reminders) is not related to the checkbox “Reminder Enabled”, which concerns automatically sent reminders.

12.4 Cancel

This action can be called only if the envelope status is “In progress” and it moves the envelope to status “Canceled”. Recipient that is next in the row for signing will get e-mail notification that the envelope is not available any more for signing. Also, all recipients that previously signed the envelope will be notified that the envelope is canceled.



12.5 Delete

“Delete” action is continuously available, disregard the status of the envelope. It permanently removes the envelope from Salesforce and Significant platform.

12.6 Host

This action opens the popup to the user with the envelope. The envelope appearance is adjusted for the next recipient in the signing row. In that popup, the user can fill all fields tailored for that specific recipient and the user can sign the document in the name of that recipient. The primary usage of this is when the sender and the recipient of the envelope are physically at the same location and are using the same computer.

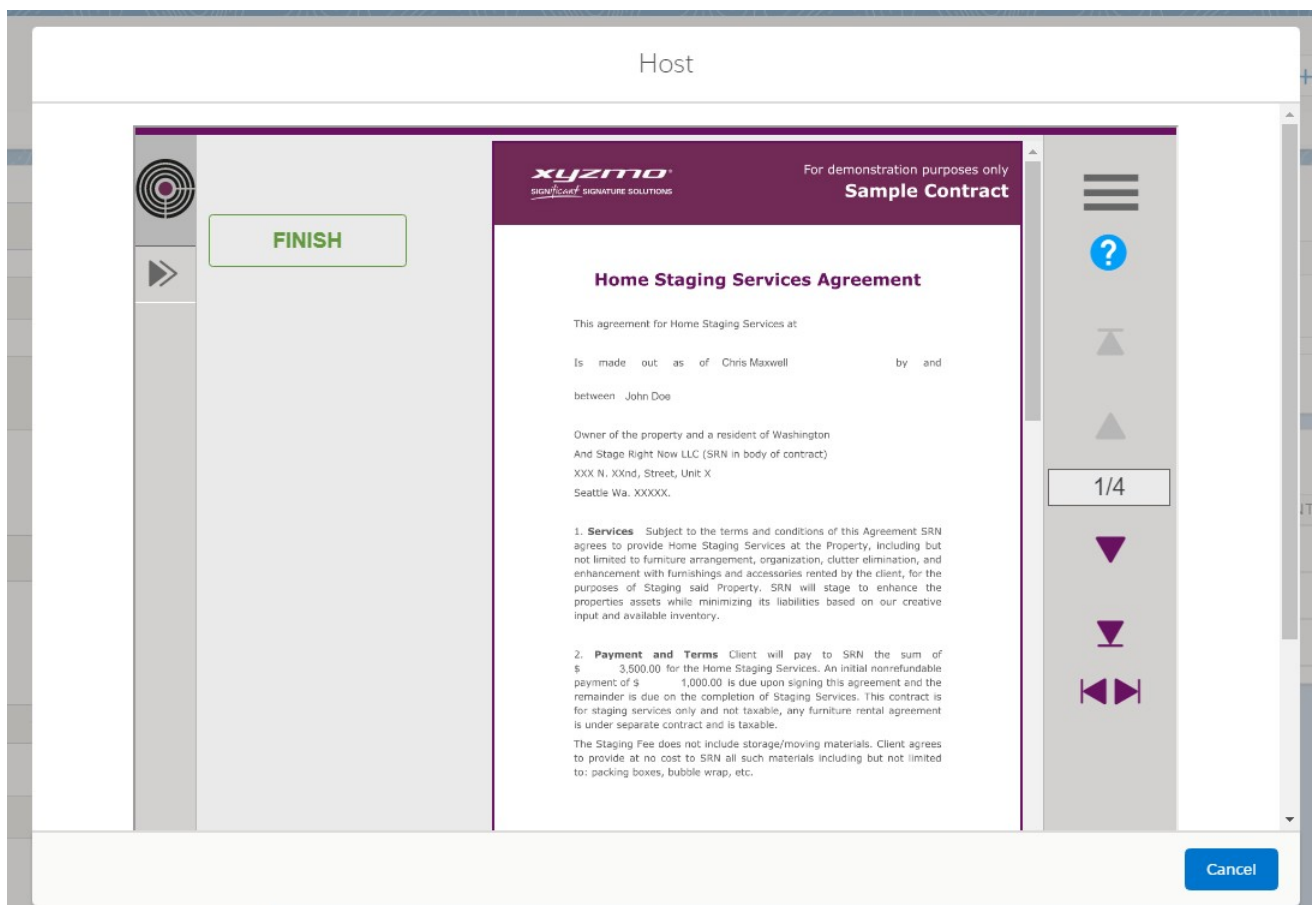


Figure 26 - Interface for host signing

After finishing host signing, next recipient in the row for signing receives the notification and can proceed with signing. The sender can use “Host” action to sign the envelope for all recipients.



12.7 Restart

This action is available only if the envelope is in "Expired" status. This action will change back the status of the envelope from "Expired" to "In progress", meaning it will be resent again to recipients, allowing them to continue signing process.

The screenshot shows the 'Envelope Demo Envelope' record page. On the left, the 'Status' is 'Completed'. The 'Date of Completion' is 13-Nov-2017 15:41. On the right, the 'Notes & Attachments (3)' section contains the following data:

TITLE	TYPE	OWNER	LAST MODIFIED
Signed copy of Demo_Contract_Form.pdf	File	Nedzad Haskovic	13/11/2017 15:41
Audit trail.pdf	File	Nedzad Haskovic	13/11/2017 15:41
Demo_Contract_Form	File	Nedzad Haskovic	13/11/2017 15:18

Below the attachments, the 'Recipients (3)' section lists the following data:

LAST NAME	FIRST NAME	E-MAIL	RECIPIENT TYPE	SIGNING DATE
Braund	Mike	likeb@metro.com	Signer	13-Nov-2017 15:41:05
Crenshaw	Carolyn	carolync@acels.com	Signer	13-Nov-2017 15:41:18
Haskovic	Nedzad	nedzad.haskovic@compusight.com	Signer	13-Nov-2017 15:41:31

Figure 27 - Envelope record page of envelope which is in "Completed" status

The screenshot shows a detailed view of the 'Notes & Attachments (3)' section. The data is as follows:

TITLE	TYPE	OWNER	LAST MODIFIED
Signed copy of Demo_Contract_F...	File	Nedzad Haskovic	13/11/2017 15:41
Audit trail.pdf	File	Nedzad Haskovic	13/11/2017 15:41
Demo_Contract_Form	File	Nedzad Haskovic	13/11/2017 15:18

Figure 28 - Signed copy of uploaded documents and Audit trail uploaded to Salesforce after envelope is completed



13. Data Mapping

Besides creating envelope from eSignAnyWhere application, an envelope can also be created from any object record (those can be records of any built-in objects in Salesforce such as leads, contacts, opportunities etc. or records of any custom objects) in Salesforce. Creating envelope from an object record has a primary purpose of mapping data from that record to form fields existing in documents.

First prerequisite is to have Envelope template ready for particular object and mapping scenario. Envelope template describes which object's fields will map to which form fields on documents that will be sent for signing, treating separately mapping from Salesforce to Namirial and from Namirial to Salesforce. First mapping prefills form fields on documents with values from the record and the second mapping updates Salesforce record with values that recipients entered in documents' form fields before signing it.

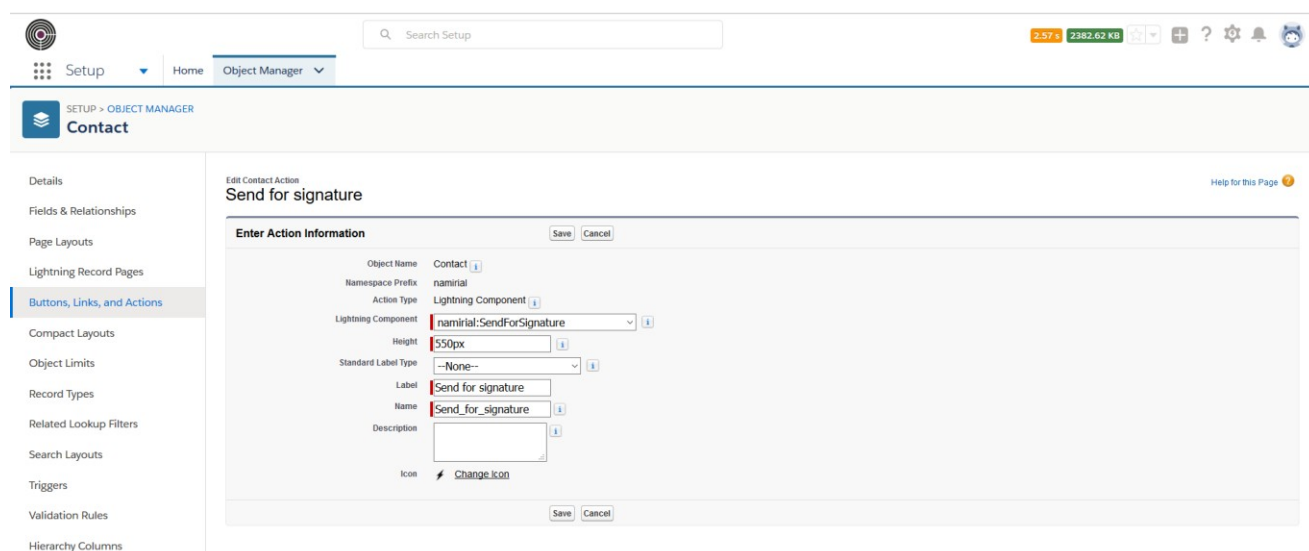
The image shows a screenshot of the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Contact' and shows the 'Edit Contact Action' configuration for 'Send for signature'. The configuration form includes fields for 'Object Name' (Contact), 'Namespace Prefix' (namirial), 'Action Type' (Lightning Component), 'Lightning Component' (namirial:SendForSignature), 'Height' (550px), 'Standard Label Type' (--None--), 'Label' (Send for signature), 'Name' (Send_for_signature), and 'Description'. There are 'Save' and 'Cancel' buttons at the bottom of the form.

Figure 29 – Creating/editing action of an object

Second prerequisite is to have "Send for Signature" button created and added to object's layout. The button can be created and added in "Object manager" in Setup page by organization administrator. First, they need to go to Setup > Object Manager > Object Name > Buttons, Links, and Actions > New Action. That would navigate to form for adding new action to the object. Fields should be filled as shown on the image below, where especially important fields are: Action Type (needs to be set to "Lightning Component"), Lightning Component (needs to be set to "namirial:SendForSignature") and Name (needs to be set to "Send_for_Signature"). Click on "Save" button will create custom action. Then, administrator needs to add that custom action to the page layout of the object. They need to go to Setup > Object Manager

> *Object Name* > Page Layouts > *Layout Name*. It should open Page Layout Editor in which administrator can add "Send for signature" button. In the upper menu, choose "Salesforce1 & Lightning Actions" category and pull "Send for Signature" button to "Salesforce1 and Lightning Experience Actions" section of the sample below. After that, click on "Save" button and "Send for Signature" button should become visible on particular layout. This procedure should be followed with any object whose data will be mapped to envelopes, except leads, contacts, accounts and opportunities. They will have "Send for Signature" button visible on all of their system layouts by default.

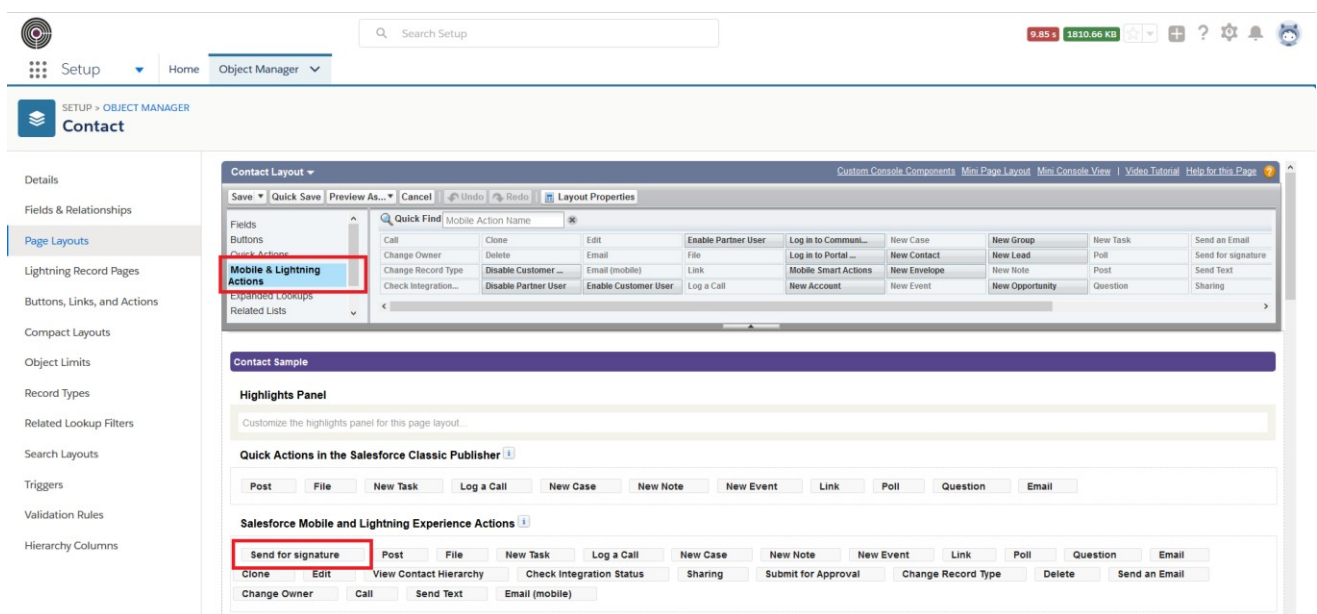


Figure 30 - Adding action to a layout of the object

When these two prerequisites are satisfied, envelope can be created from the specific record. To do so, click on "Send for Signature" button. It should open popup similar to one explained in detail under "Creating Envelope" section of this guide. It is the popup which basically does the same thing—it is used to create envelope by specifying values for main envelope fields. Those fields are the same as in popup from previous section, except this one contains two additional fields: "Upload report" which will be discussed in next section of this guide and "Envelope template" dropdown.

"Envelope template" dropdown contains the list of all envelope templates existing in the organization which are concerning the same object type (e.g. lead) as the object type of particular record from which "Send for Signature" button is clicked. The user can choose whether to use one of available templates here or not. If he doesn't select any of them and create envelope, no data mapping will apply. Otherwise, the selected template will be used to describe mapping from record fields to documents' form fields and vice versa. Selected template will be visible on envelope record page and it can be changed sometimes in the future, but before sending envelope to recipients.

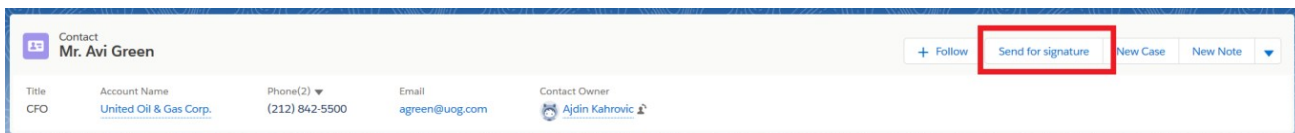


Figure 31 - Record page with "Send for signature" action

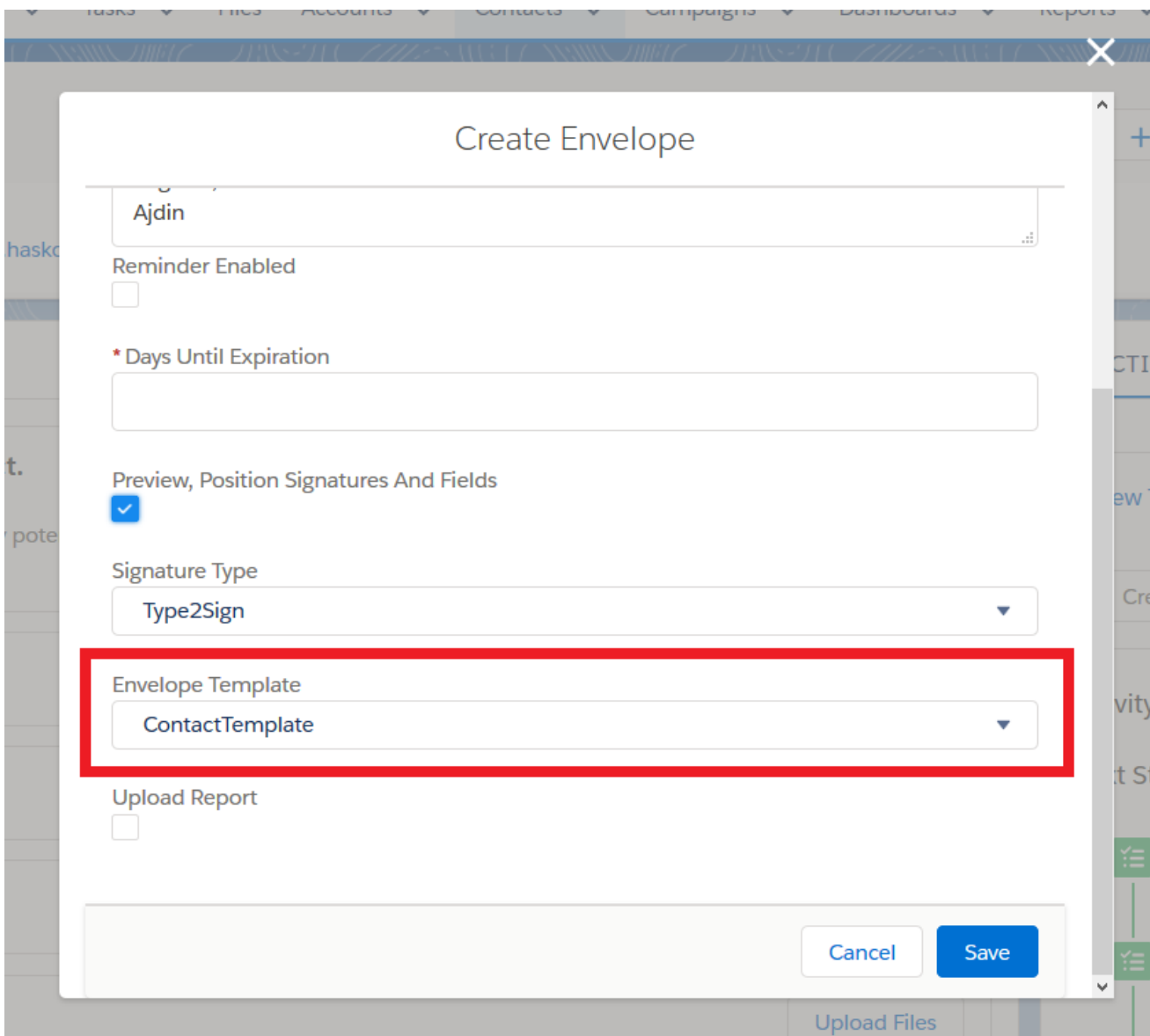


Figure 32 - Pop-up for creating envelope, opened from "Send for signature", with option to select Envelope template

Data mapping, defined in "Envelope template", consists of "In mapping", denoted as mapping from Salesforce to attached document and "Out mapping", denoted as mapping from document to Salesforce. In mapping defines set of fields on record from which the envelope is created (record on whose layout "Send for Signature" button is clicked) and that set of fields will be used to take values from and place it in form fields on envelope's documents. Basically, form fields which exist on envelope's



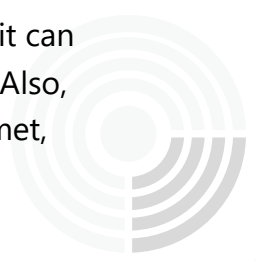
documents will be pre-filled with values from parent record (record from which the envelope is sent). That mapping from Salesforce fields to documents is described by "In mapping". Example would be to send envelope from "John Doe" contact and having template which describes that Contact's First Name fields maps to "Text1" form field on document attached and Contact's Last Name maps to "Text2" form field on document attached. When the envelope is sent, PDF document attached will have Text1 field prefilled with "John" value, a Text2 field prefilled will value "Doe". It is required that document attached to envelope has all fields defined in "In mapping" part of envelope template, if the template is used. Further details on defining data mapping from Salesforce to attached document is described under section "Managing Envelope Templates".

On the other side, envelope template defines "Out mapping", as mapping from attached document to Salesforce. When all recipients fill down fields which are assigned to them on the document and complete signing process, final version of signed document is created with final values of each form field (based on values entered by recipients). Values of these fields will be mapped to fields of the parent record (record from which the envelope is sent) upon the completion of signing process and that mapping is defined by out mapping. Therefore, parent record can be updated upon the completion of signing process with values from the document, under condition that envelope template is used and that "Out mapping" is defined. Further details on defining data mapping from Salesforce to attached document is described under section "Managing Envelope Templates".

Besides applying data mapping rules, ("in mapping" when the envelope is sent and "out mapping" when the envelope is completed), when the envelope is sent from the record, by clicking on "Send for signature" button, a recipient can be added to newly created envelope automatically. Recipient creation will happen under two conditions:

1. Recipient source for that specific object needs to be configured. If the envelope is sent from Lead record, then Lead needs to be configured as recipient source. More details about managing recipient sources can be found under section "Managing Recipient Sources".
2. Parent record needs to have valid e-mail address (text formatted as e-mail address) in the field which is defined as e-mail field (part of configuration of recipient sources).

If these two conditions are met, then recipient will be added alongside the creation of the envelope. It will have defined first name, last name and e-mail address in a way defined under "Recipient Settings" and it will have "English" set as language and "Signer" set as "Recipient type". It will be set as first and only recipient. However, it can be edited, deleted or repositioned to any other position in the row of signing. Also, new recipients can be added. On the other side, if any of two conditions is not met,



envelope will be successfully created, but recipient will not be added and no additional message will be displayed on this issue.

The screenshot displays the Salesforce CRM interface for a contact named Mr. Avi Green. The contact details include Title (CFO), Account Name (United Oil & Gas Corp.), Phone (212) 842-5500, Email (agreen@uog.com), and Contact Owner (Ajdin Kahrovic). The interface is divided into two main sections: 'RELATED' and 'ACTIVITY'. The 'RELATED' section shows a message about potential duplicates, 'Opportunities (0)', 'Cases (1)', and 'Campaign History (0)'. The 'ACTIVITY' section includes a 'New Task' form, an 'Activity Timeline', and a 'Next Steps' section. The 'Next Steps' section is highlighted with a red box and contains an event titled 'Envelope with template' with the description 'You have an upcoming Event'. The event is marked as an 'All-Day Event' and is set for 'Today'.

Figure 33 - Automatically created event for the record from which the envelope is created



Final event that occurs in process of creating envelope from parent record is creating an activity. If the object of parent record is allowed to have activities, then alongside the creation of envelope, new event will be created. Event's subject will be set to envelope's name, the event will have link to the newly created envelope and to parent record. Also, event will contain information on the date of creation of the envelope (Start) and to expected date of expiration (End). End date of the event automatically changes with the changes on the envelope: if it is still updateable (status "Not sent" or "Draft"), then with changes to "Days until expiration" field of the envelope, end date of event will change as well. It will follow date of envelope cancelation, rejection or completion as well. Event essentially represents the relationship between parent record from which the envelope is sent and the envelope itself. It allows to track all envelopes sent from a single record with basic information on when the envelope is created and when its lifecycle ended or is supposed to end.

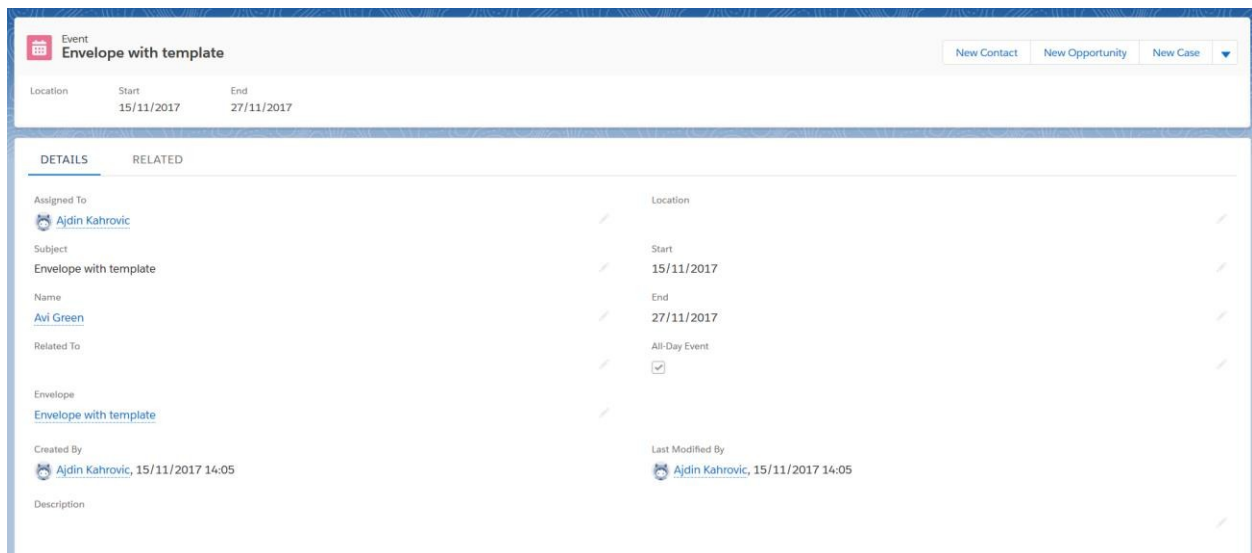
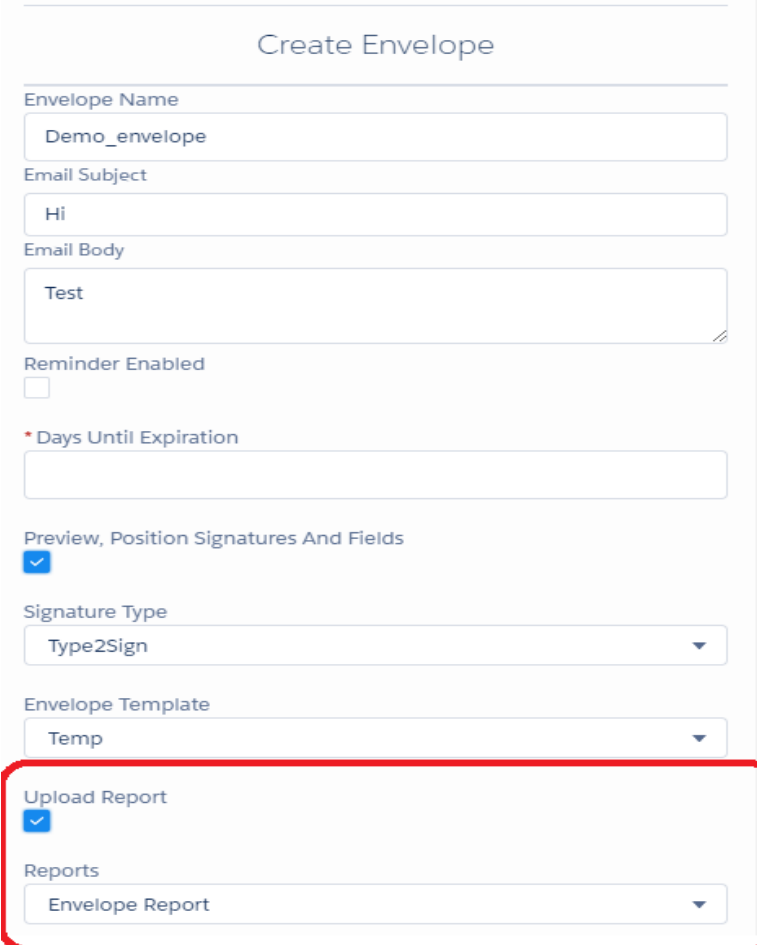


Figure 34 - Event record page



14. Upload Reports

Uploading report to an envelope is an option available when the envelope is created using "Send for Signature" button on any record in Salesforce (see previous section of the guide for more details). When the button is clicked and pop-up for creating new envelope opens, the last field of the pop-up is checkbox "Upload Report". If it is checked, additional dropdown appears below with the label "Reports" and the list of all existing reports in Salesforce. When a report from the list is selected and the envelope is created, selected report will be run again, generated as PDF document and attached to the newly created envelope as first document. This is another integration point of Salesforce data and Significant platform: documents that are sent for signature can be reports generated based on data existing in Salesforce.



The screenshot shows the "Create Envelope" form with the following fields and values:

- Envelope Name: Demo_envelope
- Email Subject: Hi
- Email Body: Test
- Reminder Enabled:
- * Days Until Expiration: (empty)
- Preview, Position Signatures And Fields:
- Signature Type: Type2Sign
- Envelope Template: Temp
- Upload Report:
- Reports: Envelope Report

Figure 35 - Creating envelope from "Send for signature" and uploading report to it

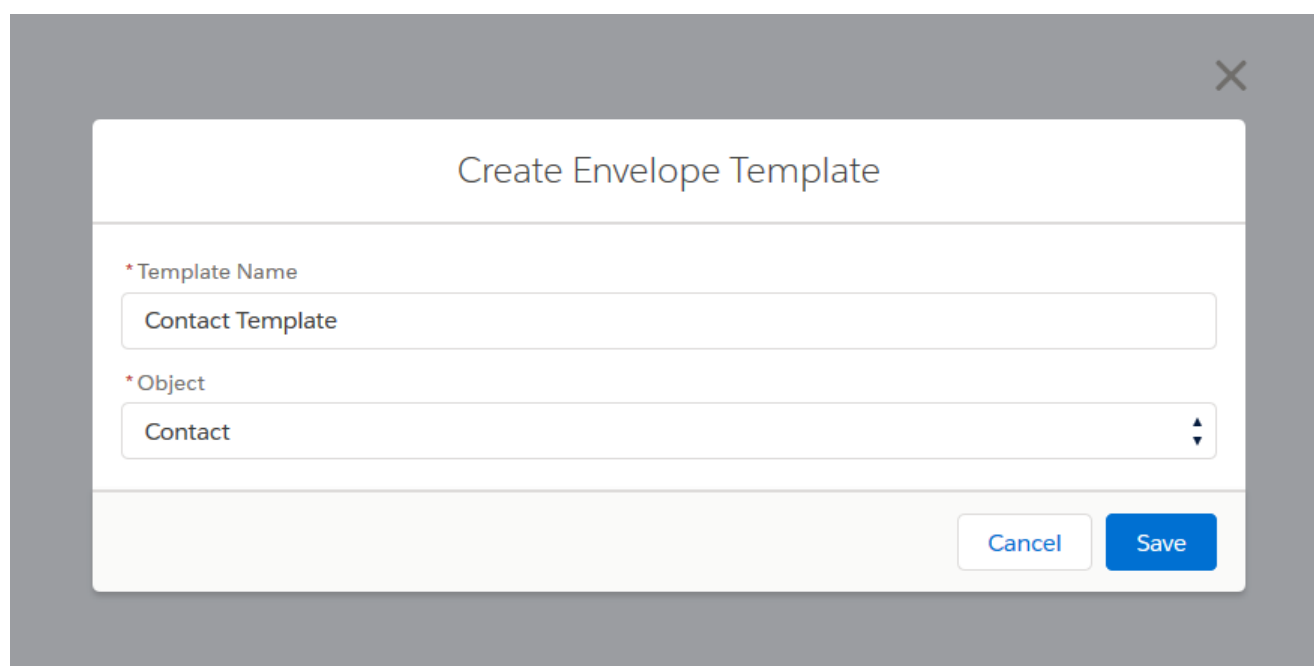


15. Managing Envelope Templates

Envelope template is a custom object found in eSignAnyWhere app. Each record of envelope template describes one scenario of data mapping between Salesforce objects and fields on one side and documents sent for signing on the other side. Management of envelope templates is done under tab "Envelope Templates" and each record of this custom object is administrated as records of any other Salesforce object: they can be accessed and deleted from lists, created using pop-up and "New link and edited on record page. The idea is to describe future mapping between Salesforce records and form fields on documents before even creating envelope. Envelope template describes data mapping and then it is used when creating envelope from Salesforce record to determine mapping between that specific Salesforce record and documents of newly created envelope.

Each envelope template has only two fields:

- **Template Name:** Name of the template that will be used only internally in Salesforce to differentiate between templates
- **Object:** Built-in or custom Salesforce object. Mapping described by specific template will concern only fields of selected object. If "Send for Signature" button is added to page layout of this object, then the list of available templates will only contain those that concern selected object.



The screenshot shows a modal window titled "Create Envelope Template". It features a close button (X) in the top right corner. The form contains two required fields: "* Template Name" with a text input field containing "Contact Template", and "* Object" with a dropdown menu showing "Contact". At the bottom right, there are "Cancel" and "Save" buttons.

Figure 36 - Pop-up for creating new envelope template

Except these fields that can be edited on pop-up for creating template or on the record page of existing template, there are also child object records named as "Envelope Template Items". Each envelope template has set of child items, where each item represents mapping between one Salesforce field and one form field on the document. Salesforce fields that are available for mapping are fields of selected object. Important feature here is that items could also refer not only to object's fields, but also to fields of related objects of selected object. For example, if selected object is Contact, then the list of available fields not only that contain all fields of Contact such as First Name or Last Name, but it also contains the list of fields of all related objects to Contact, such as fields of Parent Account, such as Account Name or Annual Revenue.

The screenshot shows the 'Envelope Template' record page for 'Contact Template'. It features a 'Data Mapping' section with two tabs: 'SALESFORCE -> DOCUMENT' (selected) and 'DOCUMENT -> SALESFORCE'. Below the tabs is a table with four columns: 'SALESFORCE FIELD', 'ENVELOPE FIELD NAME', 'ENVELOPE FIELD ELEMENT', and 'DOCUMENT'. The table contains four rows of mappings:

SALESFORCE FIELD	ENVELOPE FIELD NAME	ENVELOPE FIELD ELEMENT	DOCUMENT
Last Name	Text1	Text Box	1
First Name	Text2	Text Box	1
Account.Account Name	Text4	Text Box	1
Account.Industry	OptionSet1	Combo Box	1

At the bottom of the page, there are 'Cancel' and 'Save' buttons.

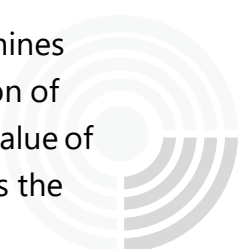
Figure 37 - Record page of envelope template showing mapping from Salesforce to Document

There are two types of template items: "In item" that describes mapping from a Salesforce field to a field on the document for signing and "Out item" that describes mapping from a field on the document for signing to a Salesforce field. In item describes from which field of the Salesforce record (record from which the envelope is created and sent) a value will be taken and placed as prefilled value of which field on the document (document that will be added to newly created envelope). The example would be that, if item describes mapping from Contact's Last Name to field "text2" which will be found on document sent for signing and this envelope is created from the contact record "John Doe", then the prefilled value in field "text2" would be "Doe" (as visible to envelope's recipients). On the other side, out item describes from which field on the signed documents, a value will be taken and used to update which field of Salesforce record (record from which the envelope is created and sent), upon the completion of

signing process. The example would be that, if out item describes mapping from field "text3" on document for signing to Annual Revenue field of Contact's Parent Account and if corresponding recipient enters in that field "1 000 000", then this value will be used to update a record in Salesforce upon the completion of signing process. If the envelope is sent from Contact "John Doe" who works for "A Datum" company, then annual revenue of "A Datum" will be set to "1 000 000". This is short depiction of data mapping process described by each template's item and more details about that can be found under "Data mapping" section of this guide.

Envelope items are managed on the record page of each envelope template. On the right side of record page, there is a list of items, divided on two tabs: in items are under tab "Salesforce -> Document", while out items are under tab "Document -> Salesforce". Each row contains one item and the last column contains the button for deleting that specific item. Items are added by clicking on "Add" button in the right upper corner of items' section of record page: item will be added as in item or out item, depending on the active (visible) tab. Each item consists of following pieces of data:

- **Salesforce Field:** field of selected Salesforce object to which the template relates. It is dropdown field containing the list of all fields of selected Salesforce object and the list of fields of all related objects to the selected object.
- **Envelope Field Name:** name of the field on the envelope document. It is assumed that the user already has PDF document with the form fields on that document. If the item is "in item", then form field needs to exist on PDF document before attaching it to the envelope. On the other side, if the document is "out item", then field can be added through designer on Significant platform (designer that opens when "Send" button is clicked on envelope record page).
- **Envelope Field Type:** this field is only relevant to in items. It determines the type of appearance of the field on the document. Available values are Text Box, List Box, Radio Button Group, Check Box and Combo Box. However, selection of type will not determine the appearance, but rather it need to correspond with actual state of the document.
- **Document:** determines the position of document on which the field is expected to appear in the row of documents attached to the envelope. The expected value is ordinal number of the document: if the value is "2", then it is expected that field, identified by "Envelope Field Name" will be found on 2nd attached document to the envelope.
- **Overwrite:** this field is only relevant to out items. It is checkbox that determines behavior in correspondence to value of Salesforce field. Upon the completion of signing process, if Salesforce field of parent record does not have value, the value of document's field will be written in that field. However, if that field already has the



value, this checkbox will determine if that value will be overwritten with new value, taken from document's field.

The screenshot shows the 'Envelope Template' record page for a 'Contact Template'. The page includes a header with 'Clone', 'Change Owner', and 'Delete' buttons. On the left, there are fields for 'Template Name' (Contact Template) and 'Object' (Contact). The main section is 'Data Mapping', which has two tabs: 'SALESFORCE -> DOCUMENT' and 'DOCUMENT -> SALESFORCE'. The 'DOCUMENT -> SALESFORCE' tab is active, showing a table with the following data:

ENVELOPE FIELD NAME	SALESFORCE FIELD	DOCUMENT	OVERWRITE
Text4	Account.Account Name	1	<input checked="" type="checkbox"/>
Text3	Account.Annual Revenue	1	<input checked="" type="checkbox"/>
OptionSet1	Account.Industry	1	<input checked="" type="checkbox"/>

At the bottom of the page, there are 'Cancel' and 'Save' buttons.

Figure 38 - Record page of envelope template showing mapping from Document to Salesforce

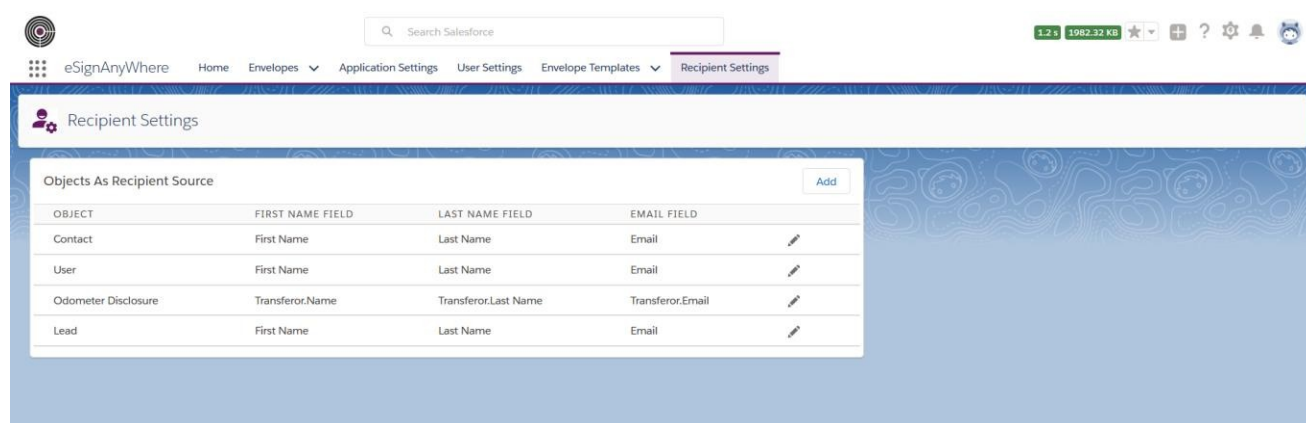
To apply changes to envelope template, made through template record page, "Save" button needs to be clicked on the bottom of the page.



16. Managing Recipient Sources

This section describes process of managing recipient sources: defining objects whose records can be converted to envelope's recipients. When the object is added as recipient source, records of that object can be used to create recipients based on their data. Management of recipient sources is available only to Salesforce users with permission set of "Namirial Administrator" and it is done under tab "Recipient Settings". Each recipient source is described by following values:

- **Object:** Salesforce (built-in or custom) object which will be used as recipient source
- **First Name Field:** field of selected object from which the value will be taken and used as first name of recipient
- **Last Name Field:** field of selected object from which the value will be taken and used as last name of recipient
- **Email Field:** field of selected object from which the value will be taken and used as e-mail address of recipient
- **Recipient Source Name:** name of recipient source that will be used to differentiate between recipient sources. By default, it is the name of the selected object and it can be changed to any text value. It also allows users to create several recipient sources with same object, but different fields set to first name, last name and e-mail address. Then, Recipient Source Name is used to differentiate among them



The screenshot shows the 'Recipient Settings' page in the eSignAnyWhere application. The page title is 'Recipient Settings'. Below the title is a table titled 'Objects As Recipient Source' with an 'Add' button. The table has four columns: OBJECT, FIRST NAME FIELD, LAST NAME FIELD, and EMAIL FIELD. There are four rows of data, each with an edit icon in the rightmost column.

OBJECT	FIRST NAME FIELD	LAST NAME FIELD	EMAIL FIELD	
Contact	First Name	Last Name	Email	
User	First Name	Last Name	Email	
Odometer Disclosure	Transferor.Name	Transferor.Last Name	Transferor.Email	
Lead	First Name	Last Name	Email	

Figure 39 - List of all recipient sources

Clicking on tab "Recipient Settings" opens the list of objects added as recipient sources. Each row in the table represents one recipient source, described by Object (which is actually the name of Recipient Source), First Name Field, Last Name Field and Email Field. When eSignAnyWhere application is downloaded from AppExchange and Application Settings configured, three recipient sources will be added automatically.

Those are Leads, Contacts and Users. As expected, first names, last names and emails of these objects will be used to create recipient sources. That can be modified and these recipient sources, just as any other, can be deleted. Each of rows in the table (recipient sources) has pen symbol in the last column which would open pop-up for editing and deleting that specific recipient source. Finally, there is

“Add” button in the right upper corner of the table which can be used to add new recipient source.

Click on “Add” button will open pop-up for adding new recipient source. It has fields for choosing object among existing Salesforce objects and fields “First Name Field”, “Last Name Field” and “Email Field” for choosing fields among existing fields of selected Salesforce object. The last field, “Recipient Source Name” field is set automatically with the change in Object dropdown and is set to the value of object’s display name by default. It can be modified and set to any other text value. Finally, there are two buttons that close pop-up: first is “Cancel” which cancels all changes and second is “Save” which saves the changes. Both of them will return you to the table with all recipient sources.

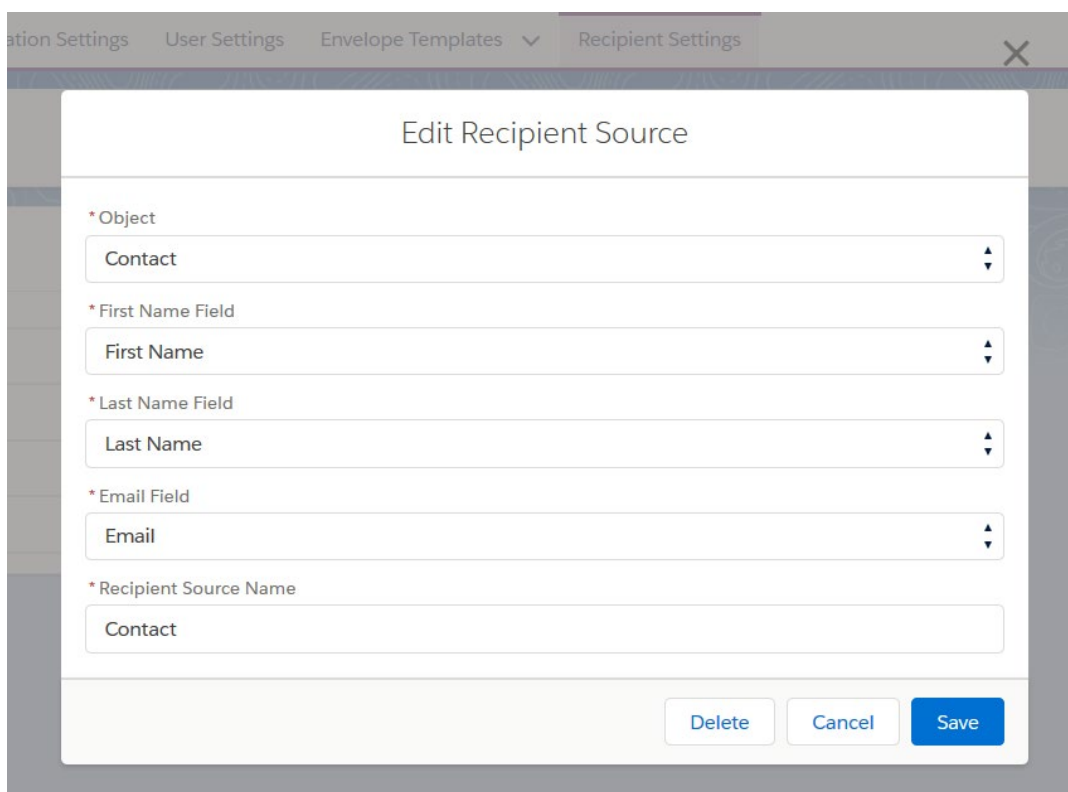


Figure 40 - Pop-up for adding/editing recipient source

When the pen in the table with recipient sources is clicked, pop-up for editing recipient source in respective row will open and it looks the same as the pop-up for adding new recipient source. All fields will be prefilled with existing values and can



be changed to any other valid value. Left to the buttons "Cancel" and "Save", "Delete" button will appear. Click on that button will delete that specific recipient source and close the pop-up.

17. Salesforce Mobile App

eSignAnyWhere application is also available in Salesforce Mobile App. The main reason for its availability on Mobile App is to allow Salesforce users to send envelopes to track progress of signing process on their mobile devices. On the other side, configuration of eSignAnyWhere application is not intended to be done on Mobile App. Therefore, not all functionalities are supported, only those that are intended to be part of everyday usage of the application. Following features are supported:

- Home page
- Envelope management, which also includes full management of recipients and full management of documents
- Actions on envelopes: Sending, Updating, Sending Reminder, Canceling, Host signing, Deleting and Restarting envelope
- Sending envelope from Salesforce record with data mapping (from "Send for signature" button)
- Uploading reports
- User Settings



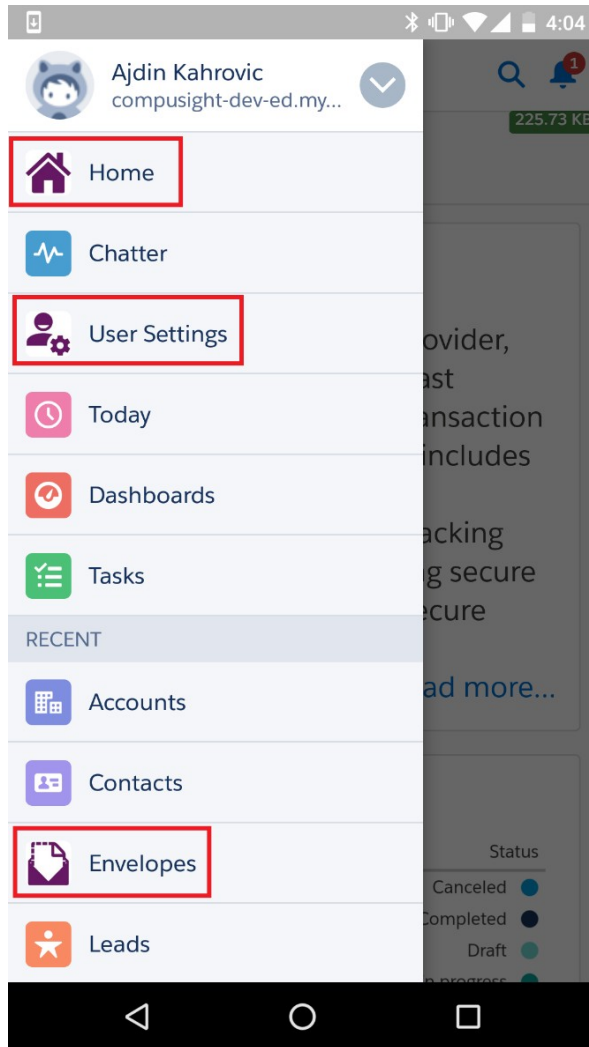


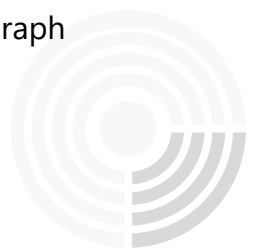
Figure 41 - Navigation menu with eSignAnyWhere items

Salesforce Mobile App does not support following features:

- Application Settings
- Managing Envelope Templates
- Managing Recipient Sources

All available features are accessible from the menu on the left side and all of them follow the same principles and behavior as on web. Menu contains following tabs:

- **Home:** leads to Home page of eSignAnyWhere application, containing section with information about Namirial, section with the list of all envelopes and graph



showing envelopes by their status and graph showing envelopes by month in which they are created

- **Envelopes:** tab containing the list of all envelopes. From that list, each existing envelope can be accessed and new one created by clicking on button "New". Accessing each envelope leads to envelope record page containing envelope details under "Details" tab and the list of documents and recipients under "Related" tab. Recipients can be added by buttons "Add Existing" and "Add New", in the same manner as explained under "Managing Recipients" section of this guide. Existing recipients can be reordered directly on the list and in order to delete or edit recipient, recipient record page needs to be accessed. It is done by clicking on the Last Name of the recipient.
- **User Settings:** tab allowing to register each specific Salesforce user (reserve his seat under the license) and to define his/her default data. Appearance and functionality of this page is described under "Configuring User Settings" section of this guide).

If any of these three tabs are not visible in the mobile app by default, you need to add them as Navigation Menu Items. It is done on Setup -> Apps -> Mobile Apps -> Salesforce -> Salesforce Navigation. Move any of these tabs from column "Available" to column "Selected" and press "Save" button. Refresh the mobile app and tabs should appear.



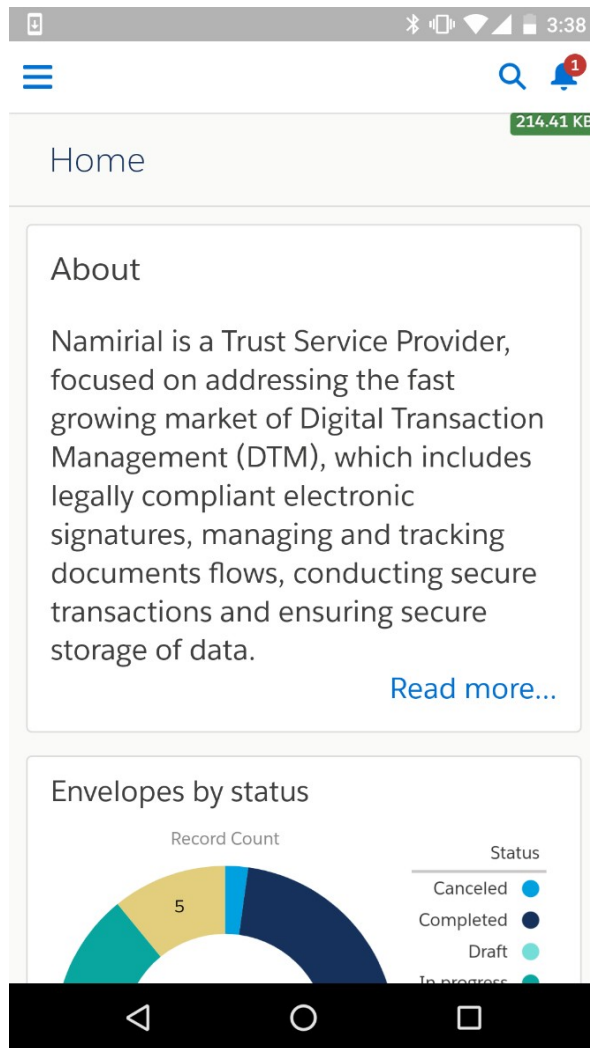


Figure 42 - Home tab on Salesforce Mobile App

Beside the tabs, other features are organized in the same manner as described before. Actions on envelopes (send, update, send reminder, cancel, host, delete, restart) are invoked from envelope record page. "Send for signature" button will appear on layouts of Salesforce object to which the button is added on the web (as described under "Data mapping" section of the guide) and clicking on that button will open pop-up for creating new envelope. It will provide options to select envelope template for data mapping and to optionally upload report.



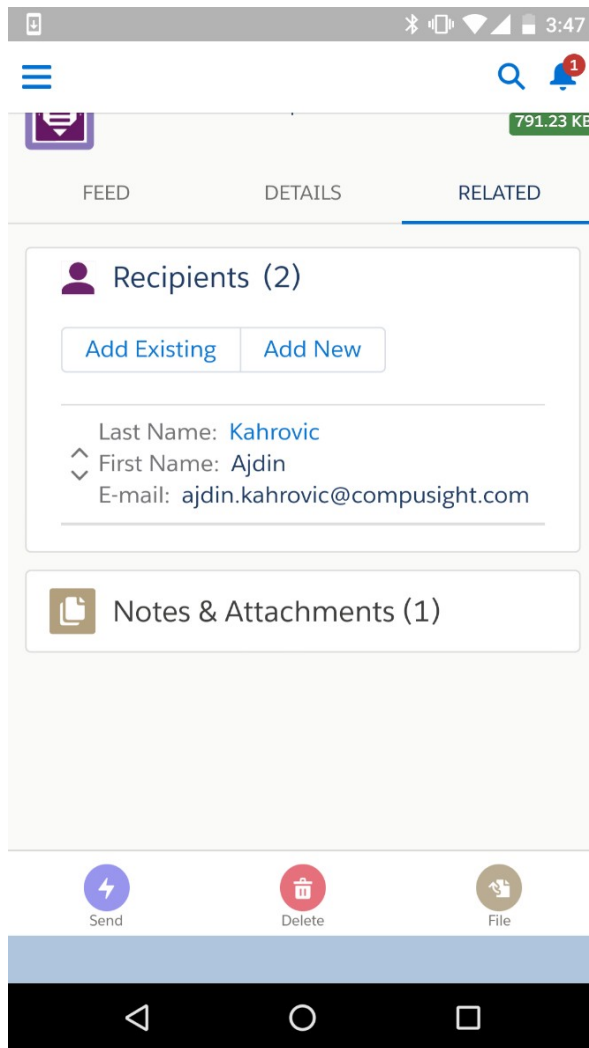


Figure 43 - Related tab of Envelope record page

Unsupported features of Salesforce Mobile App should be configured on the web. Application Settings need to be configured before using eSignAnyWhere on the Mobile App (otherwise, error will appear). Envelope templates, if to be used when creating envelope on Mobile App, need to be configured first on the web. The same pattern is with recipient sources: they need to be configured first on the web, if they are to be used on Salesforce Mobile App.

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