

Sending Adobe Sign agreements from Custom Objects in SFDC. App version 14.x and later

In this tutorial, I'll go through how to:

- set up a document template with text tags and add it to the SFDC library
- create an Agreement template
- add the Adobe Sign button to a Custom Object page layout
- create a merge mapping to merge fields data from the Custom object into an Adobe Sign agreement
- create a data mapping to map field data from the Adobe Sign agreement back into the custom object in SFDC

The custom Object, myCustomObject

To start here's a record in my custom Object:



The screenshot shows a Salesforce record page for a custom object named 'myCustomObject'. The record is titled 'Custom Record 2'. The page layout includes several fields with edit icons (pencil) on the right side:

- myCustomObject Name: Custom Record 2
- MyCustomContact: Simon Haringa (with a user profile icon)
- custom Auto Nr: A-0007
- custom text 1
- custom text 2
- comments from signer

On the right side of the record, there are three icons: 'Acc' (Account), 'Tes' (Test), and 'Ow' (Owner).

In this record, there is a lookup field to set a contact. This field sets the recipient/signer of the Adobe Sign agreement. In other words, you need to add a contact lookup field on your custom object.

The three fields:

- custom AutoNr,
- custom text 1 and
- custom text 2,

are merged into the Adobe Sign Agreement.

The field 'comments from Signer' is populated with data from the Adobe Sign agreement once the signer has signed.

611496

Creating the document template

The order of setting up the custom object is entirely up to you, but I tend to start with my template document. This document is used to create the document for the agreement. In this example, I'll be using a Word document. The template document is marked up with Adobe Sign text tags to get fields on the document. [Click here](#) for more info on text tags.

My Word document uses the following tags

- `{{!customobjectnr}}`,
- `{{!customtext1 }}`,
- `{{!customtext2 }}`,
- `{{signercomments_es_:signer:multiline(4)}}`
- And a signature field `{{_es_:signer:signature}}`.

Save the document and add this Word document to the SFDC Files library.

Setting up the Adobe Sign Agreement template

- Create a new Agreement template by opening the Adobe Sign Agreement Templates item and click New in the upper right corner of the screen.
- Give the Agreement template a name first.
- Next set the master object. In this case it is the API name of the custom object, in this case its `myCustomobject__c`.
- For Agreement name I use:
 - **My custom Adobe Sign Agreement `{!custom_Auto_Nr__c}`**I'm using a Salesforce variable to name the agreement, to ensure a unique agreement name.
- I also use variables in the message text:

Hello `{!MyCustomContact__r.Name}`,

Please sign this agreement.

**Kind regards
`{!Owner.Name}`**

- That is all we need to add for now. Click the blue save button to finish. Your agreement template should look like the screen shot below:



Agreement Template

Custom object agreement template

RELATED

DETAILS

Agreement Template Name		Owr
Custom object agreement template		
Master Object Type		
myCustomobject__c.		
Agreement Type		
Default		
<input type="checkbox"/>		
Auto Send		
<input type="checkbox"/>		
Available for Publisher Actions		
<input type="checkbox"/>		
Sender Signs Only		
<input type="checkbox"/>		

Agreement Information

Agreement Name	
My custom Adobe Sign Agreement {!custom_Auto_Nr__c}	
Message	
Hello {!MyCustomContact__r.Name},	
Please sign this agreement.	
Kind regards	
{!Owner.Name}	
Signature Flow	
Recipients sign in order	
Signature Type	
e-Signature	
Language	
English (United States)	

Agreement Options

Email Copy To	Enal
<input type="checkbox"/>	<input type="checkbox"/>

Adding Recipient and file attachment

Click the 'Related' tab to show the related list items for an agreement template.

- Click the New button next to 'Add Recipient'



Add Recipients (0)

New

- Set the source of the recipient to 'Look Up based on master object Field'
- Set Recipient type to 'Contact'
- Set Recipient role to 'Signer'
- Set Signer verification method 'Email' and click next.
- Select the Contact lookup field you added to the custom object and click Save.

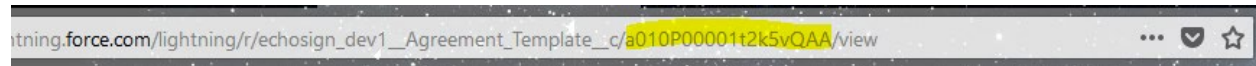
With the Recipient added, add the Word document template.

- Click the new button next to 'Add File Attachments'



- for Type select 'document from Content and click Next
- select the document uploaded to the Files library and click Save

Have a look at your browsers address bar and make a note of the Agreement template record ID. In my case the record id is highlighted in the screen shot below:



Creating and adding an Adobe Sign button to the custom Object

The agreement template is done for now, next up is to add a 'Send to Adobe Sign' button to the custom object.

- Go to setup> Objects and Fields> Object Manager>MyCustomObject__c
- Click Buttons, Links and Actions
- Click new Button or Link (upper right corner of the screen)
- I'm calling my button 'Send to Adobe Sign, but feel free to call it anything you like.
- Select Detail Page button for Display Type.
- Copy the following link in the large text area

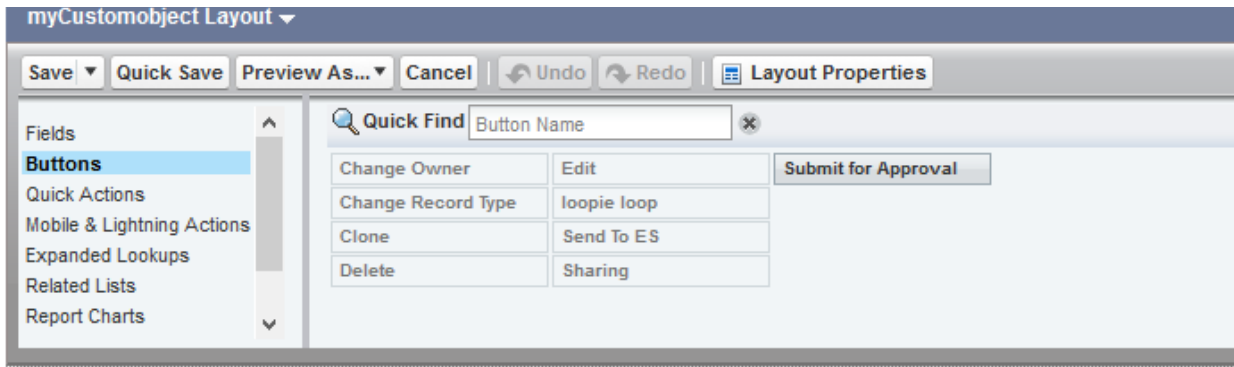
```
{!URLFOR('/apex/echosign_dev1__AgreementTemplateProcess', null, [masterId = myCustomobject__c.Id, templateId='a024J000002LuyBQAS'])}
```

DO change the tempalteld to your own id noted earlier. Also use the right name for your custom object ID reference in case you named your custom object something else.

- Check the syntax and click Save.

Now the button needs to be added to the page layout and added to Mobile and Lightning actions

- Click Page Layouts
- Click on the page layout name to edit it
- From the myCustomobject layout select Buttons



- Drag your custom button to the custom button section on the layout.
- Click the blue link in the 'Salesforce Mobile and Lightning Experience Actions':

Salesforce Mobile and Lightning Experience Actions [i](#)

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in this section inherits that set of actions by default when you click to override.

- It'll change to:

Salesforce Mobile and Lightning Experience Actions [i](#)



- Drag the custom button to the desired order, in the screen shot above I've placed the button in front of everything else.

Now test your button. Go to your Custom object and if you haven't already create a new record. When done click the Send to ES button. The agreement page opens where the recipient, Agreement details are pre-populated and has a document attached.

Recipients

1 [edit] [share] Simon Haringa [x] haringa@adobe.com [lock] Email [comment] [x]

[Add Recipient](#) | [Add Me](#) | [Add Cc](#)

Details

My custom Adobe Sign Agreement A-0007

Hello Simon Haringa,

Please sign this agreement.

Kind regards
de sender

[lock] Search Account [x]

[lock] Search Opportunity [x]

[lock] Search Contract [x]

Files

[Add Files](#)

[lock] Your Custom Object document.docx

Salesforce Document [x]

Setting up Merge and Data Mapping

Feel free to send the agreement for signature. If you were to examine this agreement as a signer, you'll notice that none of the fields are pre-populated. Time to create a merge mapping:

- Go to the Merge Mapping item and click new.
- Give it a name.
- Click save
- To start adding a mapping click 'Add Field Mapping'.
- Start with the generated number field. This field is named 'customobjectnr' in the Word template, so type 'customobjectnr' in the 'Target Adobe Sign Document Field'.
- To map this Adobe Sign field to the SFDC field click the 'Selected Object' link.
- In the object selector find the Object, the merge field is on. Here it is the myCustomobject object. However this object will not be found right now.

Adding a lookup relation

To make your custom Object appear in this list, add 'myCustomobject' as a relationship to the Agreement object:

- Cancel the Object Selector dialog
- go to setup>Objects and Fields>Object Manager and click on Agreement (echosign_dev1__SIGN_Agreement__c)
- Click Fields & RelationShips
- Click New and select 'Lookup Relationship for data type.
- Click next and select your custom object and click next..

- Give it a name and click next until you can save. Make changes where appropriate for your SFDC instance.
- Now go back to Adobe Sign merge mappings and try creating the map again. This time myCustomobject is available in the drop-down list (it probably is the last option).
- Select myCustomobject (Reference) and in the next drop-down select the required field, in this case 'custom Auto nr (String)' and click select.

That's the first mapping done. Add the remaining field mappings customtext1 and customtext2. When all the mappings have been added, click save. The merge mapping should look like this when done:

Merge Mapping Items				
Map Salesforce Object Fields to EchoSign Document Fields				
Target EchoSign Document Field	Source Type	Source Value	Disable	Action
<input type="text" value="customobjectnr"/>	Salesforce Object Field	Edit : myCustomobject : custom Auto Nr	<input type="checkbox"/>	
<input type="text" value="customtext1"/>	Salesforce Object Field	Edit : myCustomobject : custom text 1	<input type="checkbox"/>	
<input type="text" value="customtext2"/>	Salesforce Object Field	Edit : myCustomobject : custom text 2	<input type="checkbox"/>	

[Add Field Mapping](#)

Adding the merge mapping to the Agreement template

Now add the mapping to the agreement template;

- Go to Adobe Sign Agreement template item.
- Click your Agreement template for your custom object
- Go to the Mapping Settings section (under Details) and click the pencil icon to edit.
- Find the custom merge mapping created previously and save the template.

Let's test the button again. Go to the custom record and click the send to Adobe Sign button. To get a preview of the merge fields, enable the 'preview document or position signature fields' checkbox. The agreement opens in the Adobe Sign authoring tool, but also previews if the fields have been merged ok. So with preview enabled click send for signature.

Your Custom Object document

Nr:

Custom text1:

Custom text 2:

Signer comments:

And a signature field *Signature

However there's no data in these fields yet, what's missing still? Also note you may have received an email by now about an error processing adobe sign merge mapping.

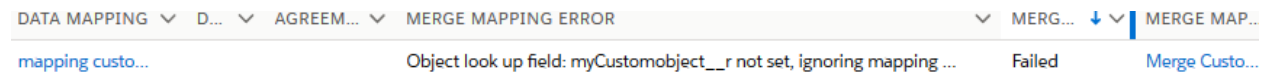
Troubleshooting the problem

Adobe Sign offers a way to troubleshoot merge and data mappings.

- Go to the Agreement list view
- Go to list view controls and select Fields to display
- Select all fields which start with Merge Mapping into visible views and click save.

Open the Agreements list view and find your agreement with the failed merge mapping:

Object look up field: myCustomobject__r not set, ignoring mapping entry



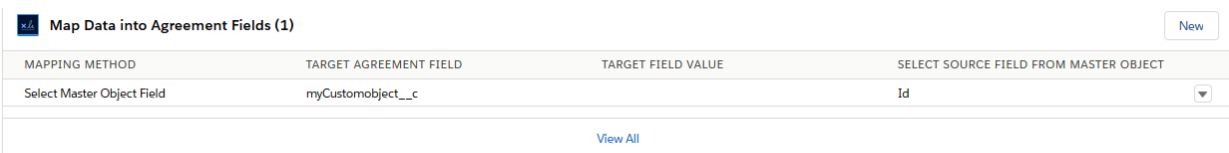
The screenshot shows a table with the following content:

DATA MAPPING	D...	AGREEM...	MERGE MAPPING ERROR	MERG...	MERGE MAP..
mapping custo...			Object look up field: myCustomobject__r not set, ignoring mapping ...	Failed	Merge Custo...

It means that the Agreement has no way of knowing where to find the source fields. Let's fix this issue.

- Go back to the agreement template
- Go to related lists
- Go to 'Map Data into Agreement Fields' section and click the New button there.
- For Mapping method choose, 'Select master Object field' and click next.
- In the select Source Field from Master Object, select the Record ID (ID) value.
- For target Agreement field opt for the 'MyCustomobject (Reference)' value, or whatever you called your custom object. It is probably the last item in this list.
- Click save.

Here's how it looks in the agreement template:



The screenshot shows a table titled "Map Data into Agreement Fields (1)" with a "New" button in the top right corner. The table has the following content:

MAPPING METHOD	TARGET AGREEMENT FIELD	TARGET FIELD VALUE	SELECT SOURCE FIELD FROM MASTER OBJECT
Select Master Object Field	myCustomobject__c		Id

Below the table is a "View All" link.

(Note, you may need to refresh the related item list if it still shows (0). Click on 'Map Data into Agreement Fields (0)' and your mapping should be there. Return to the Agreement templates related lists it should show as in the above screenshot)

Let's test the button again, this time with preview enabled. As an aside, instead of Preview you can also enable hosted signing. When you click send for signature, the agreement opens ready for signing on your screen. (On-Host-signing can be used when your signer is visiting in person for example)

This time it is working.

Select Participant:

Anyone ▼

Signature Fields

Signer Info Fields

Data Fields

More Fields

Signature

Initials

Signature Block

Your Custom Object document

Nr:

Custom text1:

Custom text 2:

Signer comments:

Close

Taking it back to SFDC

As a final step add a Data Mapping, so any fields filled out by the signer on the agreement, can be mapped back into SFDC

- Go to Adobe Sign data mapping. It's just like Merge mapping, but in reverse.
- Click new, provide a name, and enable the default option.

Now data mapping allows us to map both fields from the agreement as well as the signed file. Below explains how to map a field, but mapping a file works in much the same way.

- Click Add mapping under Fields mapping
- Click the 'Select Object' and add 'myCustomobject'. No need to drill down any further.
- In the dropdown under 'Which Salesforce Field to update?' select the field the data goes into. In this case it's the 'comments from Signer' field.
- This value is coming from an Adobe Sign Form Field and the value of this field is 'signercomments' as per the Word template.
- Click save

The Mapping should look like this:

The screenshot shows the 'Data Mapping' configuration page. At the top, there is a 'Data Mapping Name' field containing 'mapping_custom' and a 'Default Data Mapping?' checkbox which is unchecked. Below this is a section titled 'Fields Mapping'. It includes an '(Optional) Import fields from signed Agreement:' section with an 'Import Form Fields' button. A note states: 'For each Field Mapping row, select: 1) the Salesforce Object and Field to update, 2) where the data is coming from (EchoSign Form Field is the Adobe Document Field), and 3) when to run the field mapping.' The main table has the following structure:

Actions	Disable	1) Which Salesforce Object to Update?	Which Salesforce Field to Update?	2) Where is the Data Coming From? - Select Type	What is the Value of the Data?	3) When to Run Mapping? - Select Agreement Status
	<input type="checkbox"/>	myCustomobject	comments from signer (Text Area)	EchoSign Form Field	signercomments	Signed/Approved/Accepted/Form-Filled/Delivered

At the bottom left of the table is an 'Add Mapping' button.

- Finally go to the Adobe Sign Agreement templates and update the template with this data mapping same [as for the merge mapping](#). (mapping settings>Data mapping)

Now let's have another test of the button. When the agreement comes up, enable hosted signing (so it is possible to quickly sign the agreement for this test). During signing, ensure to fill out the signer comments field. When signed, check the custom record and ensure that this field is updated with the text you filled out on the agreement.