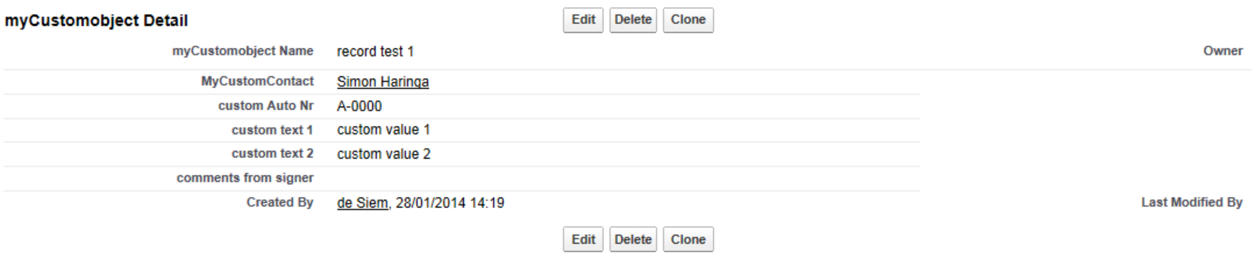
Sending Adobe Sign agreements from Custom Objects in SFDC. App version 14.x

In this tutorial, I 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:



myCustomobject Detail

myCustomobject Name	record test 1	Owner
MyCustomContact	Simon Haringa	
custom Auto Nr	A-0000	
custom text 1	custom value 1	
custom text 2	custom value 2	
comments from signer		
Created By	de Siem, 28/01/2014 14:19	Last Modified By

In this record, there is a lookup field to set a contact. This field sets the recipient/signer of the Adobe Sign agreement.

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.

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 library.

Setting up the Adobe Sign Agreement template

Go to Adobe Sign Agreement templates tab and click new. Give the template a name first. Next set the master object. In this case it,it is the API name of the custom object, in this case its myCustomobject__c.

Skip the next two checkboxes.

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:

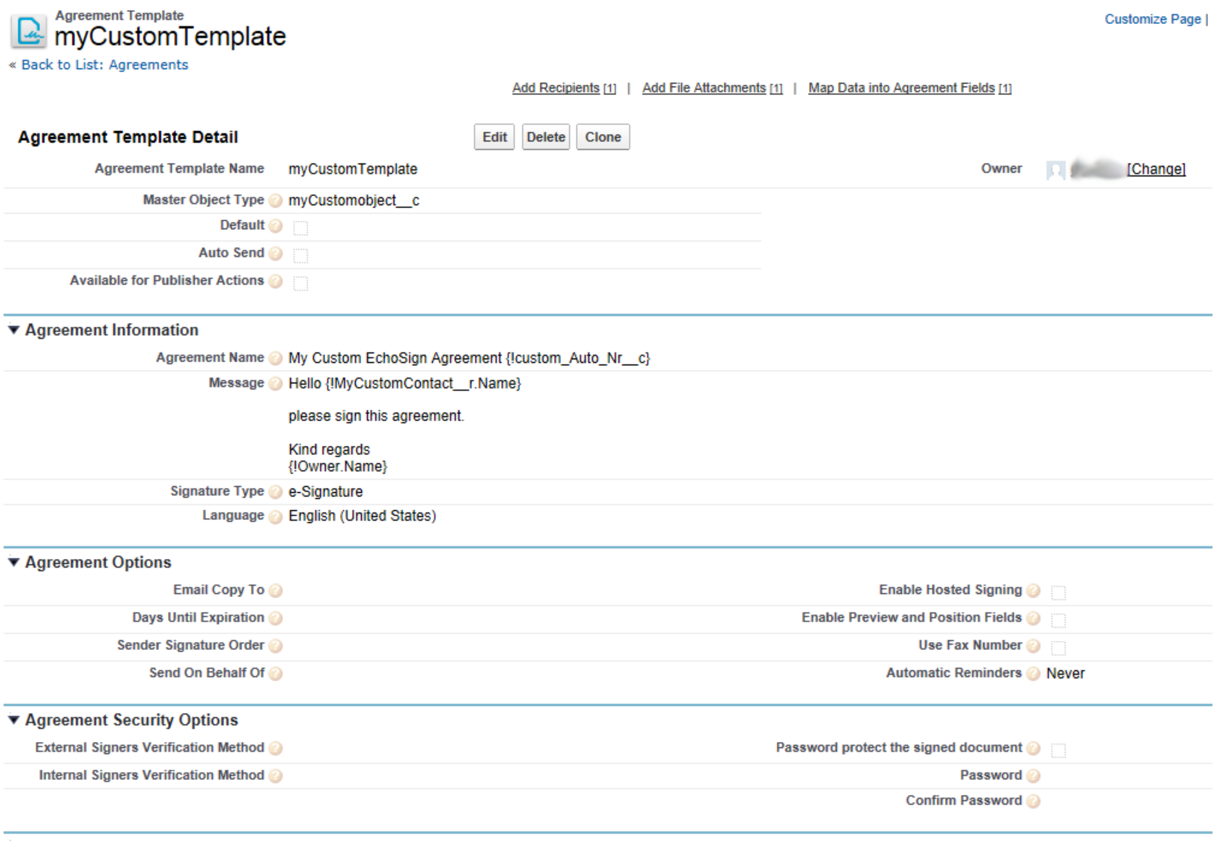
Hello {!MyCustomContact__r.Name}

please sign this agreement.

Kind regards

{!Owner.Name}

Skip the Agreement options, security options, Mapping settings (for now) and Referenced Objects. And click Save. Your agreement template should look like the screen shot below:



Agreement Template

myCustomTemplate

« Back to List: Agreements

Customize Page |
Add Recipients [1] | Add File Attachments [1] | Map Data into Agreement Fields [1]
Edit
Delete
Clone

Agreement Template Detail

Agreement Template Name	myCustomTemplate	Owner	[redacted] [Change]
Master Object Type	myCustomobject__c		
Default	□		
Auto Send	□		
Available for Publisher Actions	□		

▼ Agreement Information

Agreement Name	My Custom EchoSign Agreement {!custom_Auto_Nr__c}

Message	Hello {!MyCustomContact__r.Name}
	please sign this agreement.
	Kind regards
	{!Owner.Name}

Signature Type	e-Signature
Language	English (United States)

▼ Agreement Options

Email Copy To		Enable Hosted Signing	□
Days Until Expiration		Enable Preview and Position Fields	□
Sender Signature Order		Use Fax Number	□
Send On Behalf Of		Automatic Reminders	Never

▼ Agreement Security Options

External Signers Verification Method		Password protect the signed document	□
Internal Signers Verification Method		Password	
		Confirm Password	

Adding Recipient and file attachment

Scroll down in the Agreement template until you find the Recipient section.

- Click the new Add Recipient button.
- Set the source of the recipient to ‘Look Up based on master object Field’ and click next.
- Select the Contact lookup field and click Save.
- With the Recipient added, add the Word document template.
- Click new Add file attachment,
- for Type select document from Library and select the document uploaded to the library.
- Take a note of the ES template ID, in the browser address bar. In this case it is: a01U000000QLQWn

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.

- Go to setup>create>Objects>MyCustomOject>Buttons, Links and Actions
- Click new Button or Link
- I’m calling my button ‘Send To Es’, 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

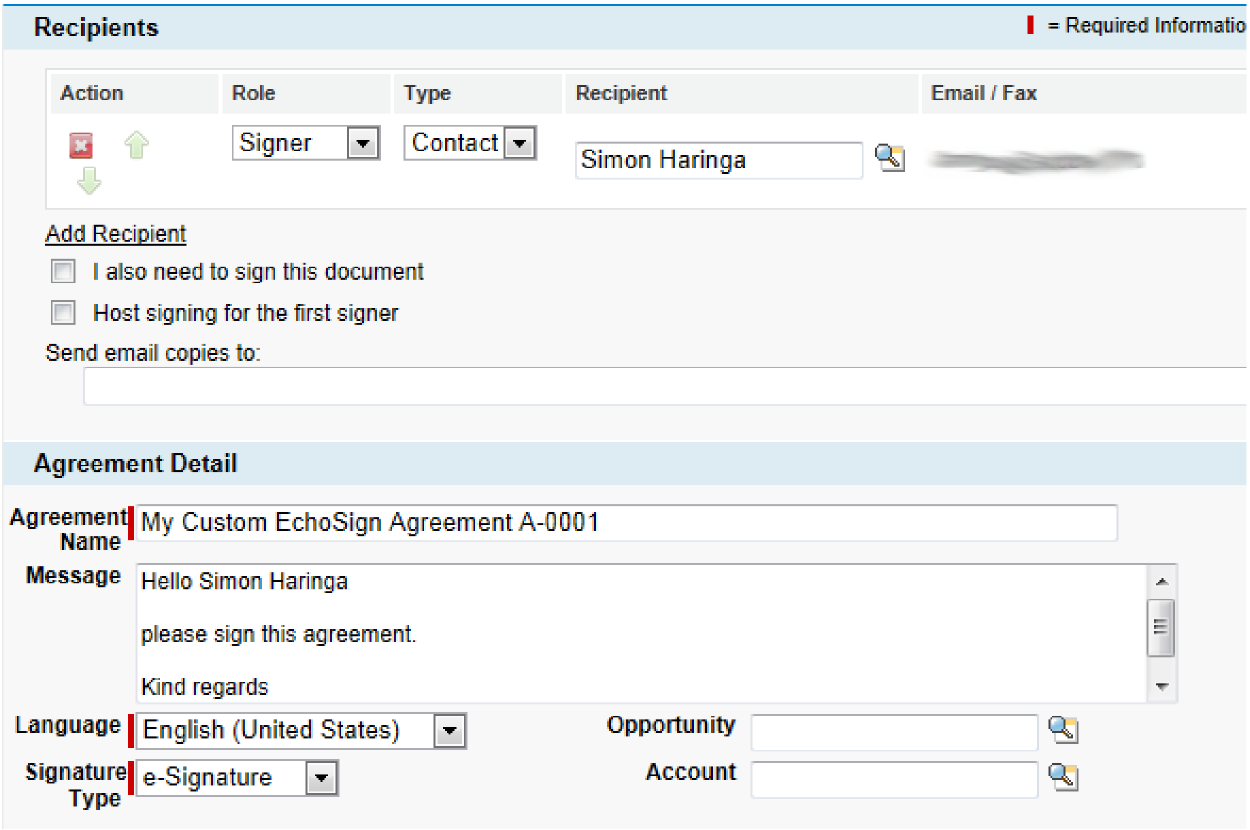
```
/apex/Adobe
Sign_dev1__AgreementTemplateProcess?masterid={!myCustomobject__c.Id}&t
emplateId=a01U000000QLQWn
```

Obviously change the tempalteId to your own id.

- Save the button.

Go to the Page layouts of the Custom Object and click edit. Add your newly created button to the layout and save it.

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 detail are pre-populated and has a document attached.



Recipients

= Required Informatio

Action	Role	Type	Recipient	Email / Fax
	Signer	Contact	Simon Haringa	[redacted]

Add Recipient

□ I also need to sign this document

□ Host signing for the first signer

Send email copies to:

Agreement Detail

Agreement Name	My Custom EchoSign Agreement A-0001
Message	Hello Simon Haringa please sign this agreement. Kind regards
Language	English (United States)
Signature Type	e-Signature
Opportunity	
Account	

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. To create a merge mapping:

- Go to the Adobe Sign Merge Mapping tab and click new.
- Give it a name.
- Tick the default checkbox.
- Click save
- To start adding a mapping click 'Add Field Mapping'.

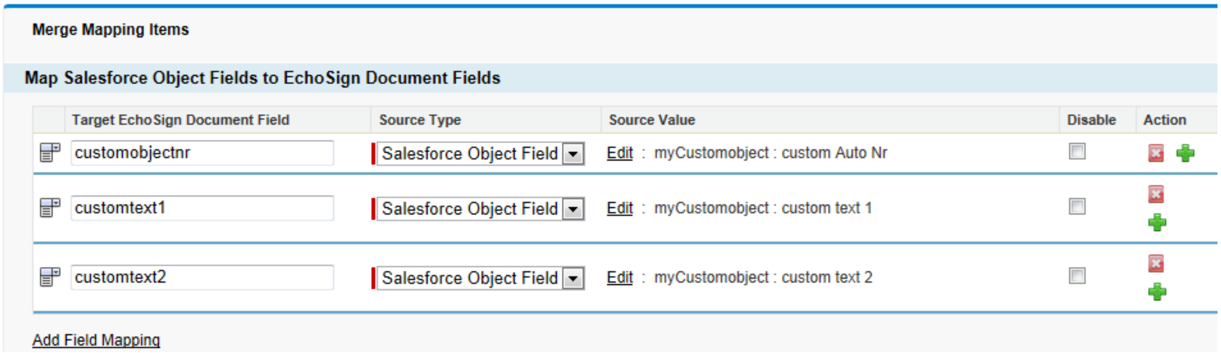
- Start with the generated number field. This field is named ‘customobjectnr’ in the Word template, so type ‘customobjectnr’ in the ‘Target Adobe Sign Document Field’.
- To map this Adobe Sign field to the SFDC field click the ‘Select Field’ link.
- In the object selector find the Object, the merge field is on. Here it is the myCustomobject object. However this object will not be found right now.

Adding a lookup relation

To make it appear in this list, add myCustomobject as a relationship to the Agreement object:

- Cancel the Object Selector dialog
- go to setup>objects>Agreement>Custom Fields & RelationShips.
- Click New and select ‘Lookup Relationship for data type.
- Click next and select your custom object.
- Select myCustomobject 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
customobjectnr	Salesforce Object Field	Edit : myCustomobject : custom Auto Nr	□	☒ ✚
customtext1	Salesforce Object Field	Edit : myCustomobject : custom text 1	□	☒ ✚
customtext2	Salesforce Object Field	Edit : myCustomobject : custom text 2	□	☒ ✚

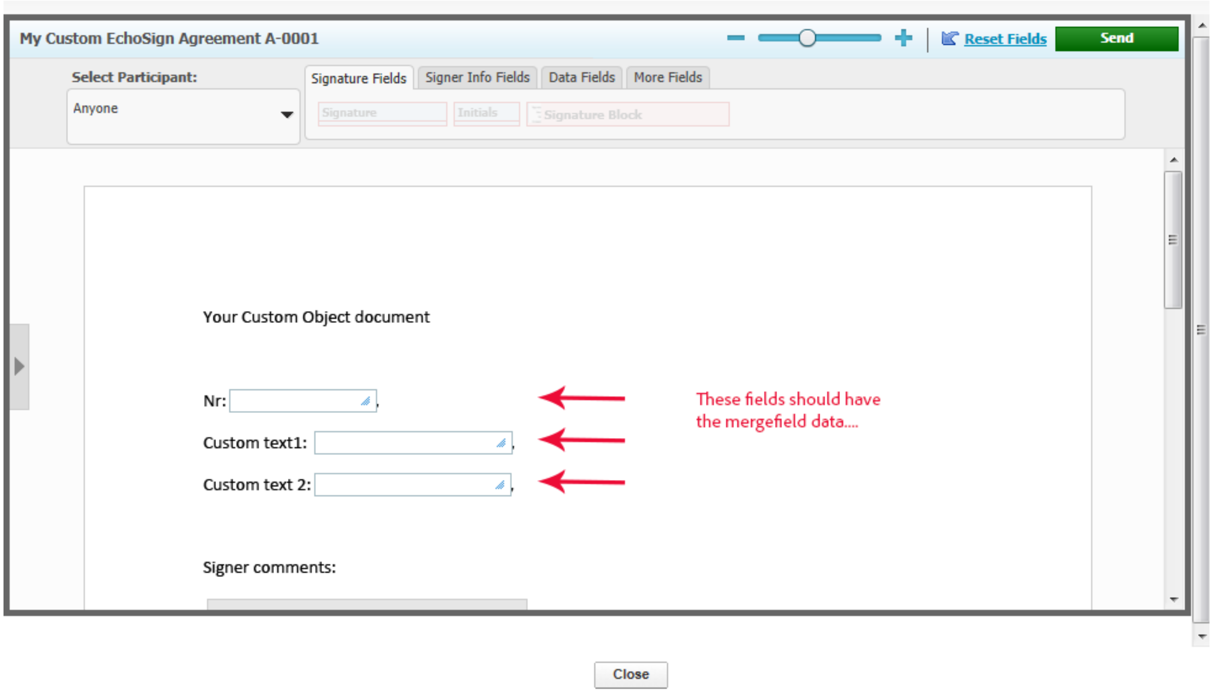
Add Field Mapping

Adding the merge mapping to the Agreement template

Now add the mapping to the agreement template;

- Go to Adobe Sign Agreement template tab.
- Click Edit and go to the Mapping Settings section.
- Here look up the custom merge mapping 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:

These fields should have the mergefield data....

Signer comments:

Still no merge fields. What’s missing still?

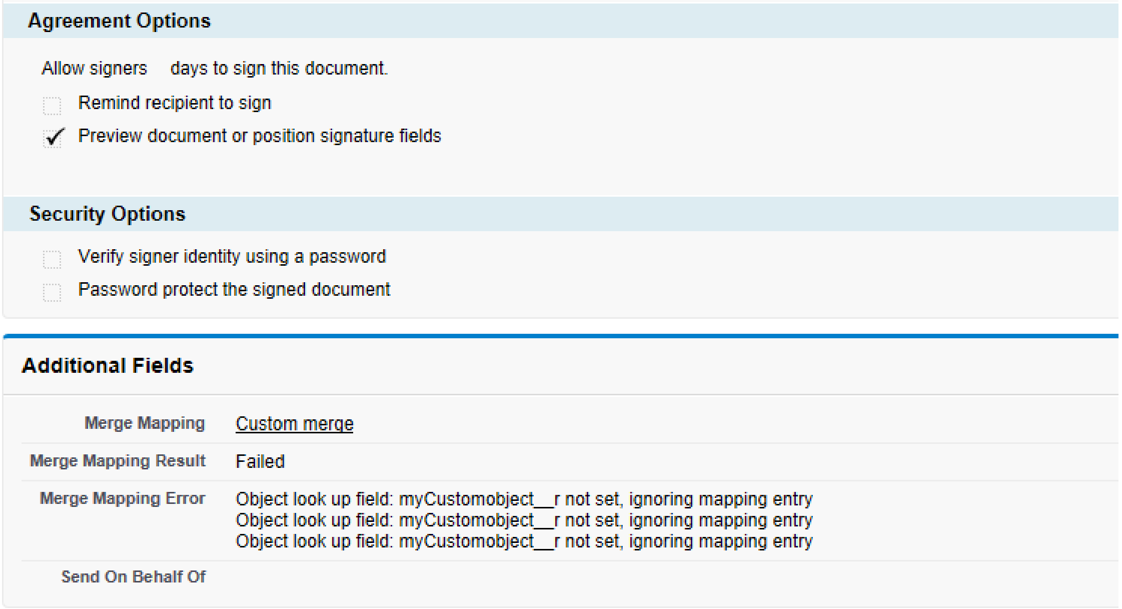
Troubleshooting the problem

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

- Go to setup>Create>Objects>Agreement>Fields Sets (Beta) and click edit.
- Drag all fields which start with Merge Mapping into the field set and click save.

Now test again (no need to enable preview this time) and send for signature and close the confirmation page. The agreement has been updated so let's have a look at the newly added fields. It says that it failed and the same error is repeated for the three fields:

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



Agreement Options

Allow signers days to sign this document.

□ Remind recipient to sign

☑ Preview document or position signature fields

Security Options

□ Verify signer identity using a password

□ Password protect the signed document

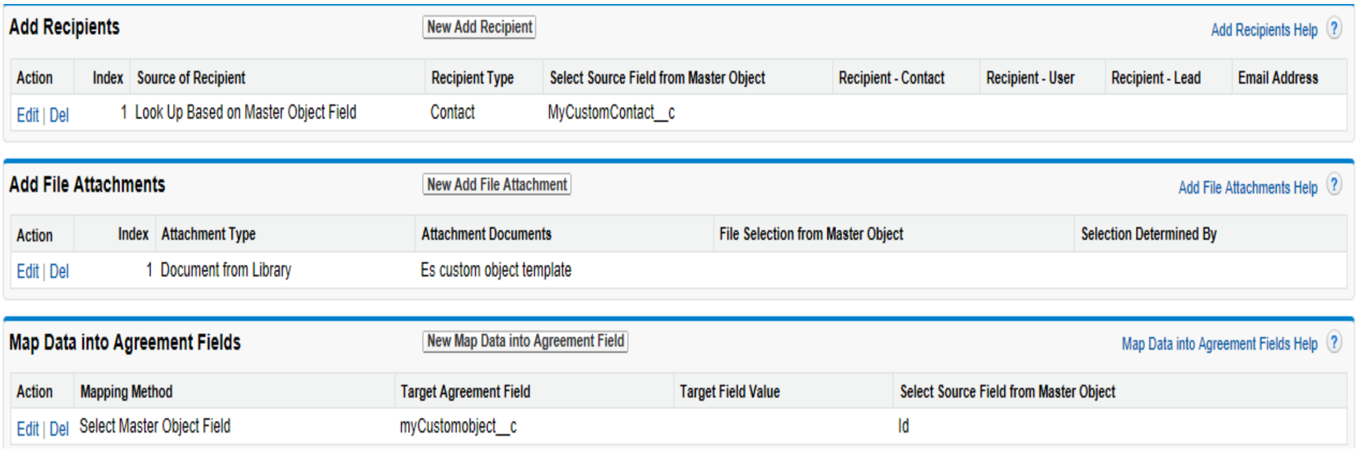
Additional Fields

Merge Mapping	Custom merge
Merge Mapping Result	Failed
Merge Mapping Error	Object look up field: myCustomobject__r not set, ignoring mapping entry Object look up field: myCustomobject__r not set, ignoring mapping entry Object look up field: myCustomobject__r not set, ignoring mapping entry
Send On Behalf Of	

Basically 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 and scroll to the last option 'map data into Agreement fields'. Click the new button.
- 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:



Add Recipients

Action	Index	Source of Recipient	Recipient Type	Select Source Field from Master Object	Recipient - Contact	Recipient - User	Recipient - Lead	Email Address
Edit | Del	1	Look Up Based on Master Object Field	Contact	MyCustomContact__c				

Add File Attachments

Action	Index	Attachment Type	Attachment Documents	File Selection from Master Object	Selection Determined By
Edit | Del	1	Document from Library	Es custom object template		

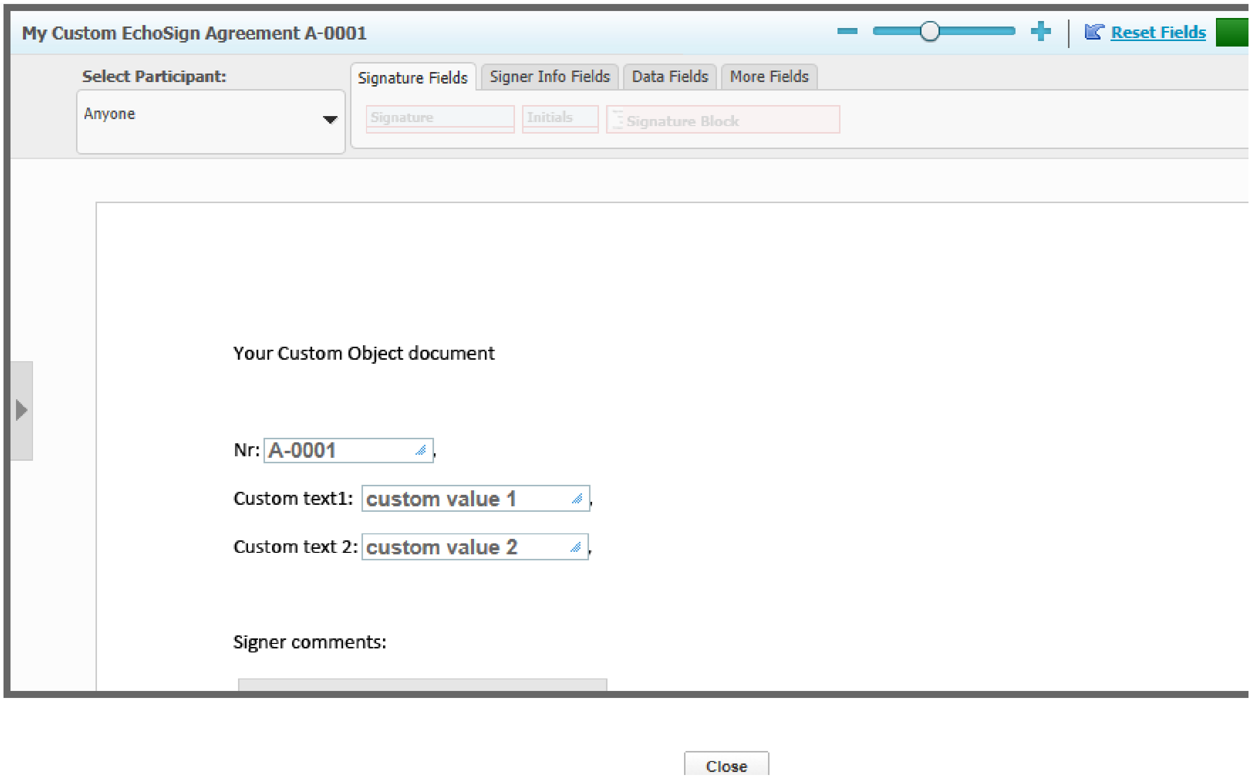
Map Data into Agreement Fields

New Map Data into Agreement Field
Map Data into Agreement Fields Help

Action	Mapping Method	Target Agreement Field	Target Field Value	Select Source Field from Master Object
Edit | Del	Select Master Object Field	myCustomobject__c		Id

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.



My Custom EchoSign Agreement A-0001

Your Custom Object document

Nr: A-0001

Custom text1: custom value 1

Custom text 2: custom value 2

Signer comments:

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 and 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. (If the record is still open you may need to refresh the web page.