

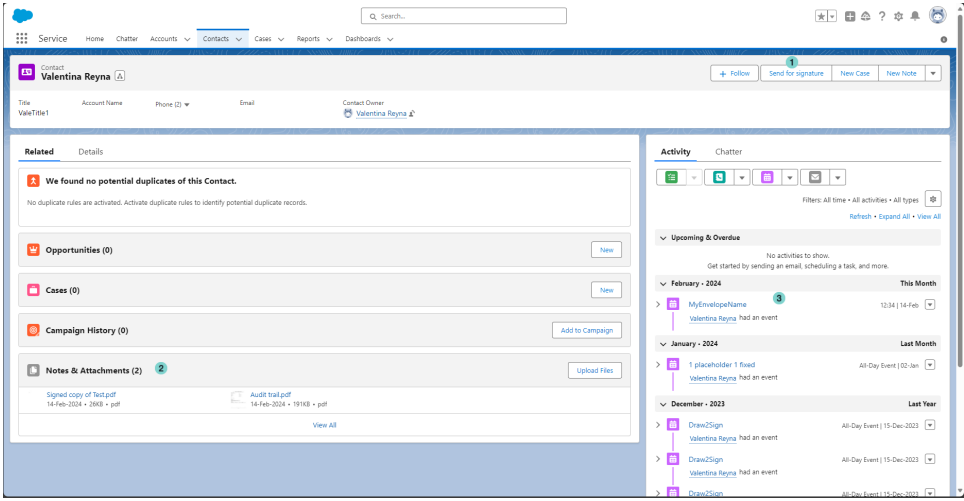
# Create New Envelope from Parent Record - User Guide - Salesforce Connector

Creating an envelope from parent record allows you to (additionally to what is possible from "envelopes list"):

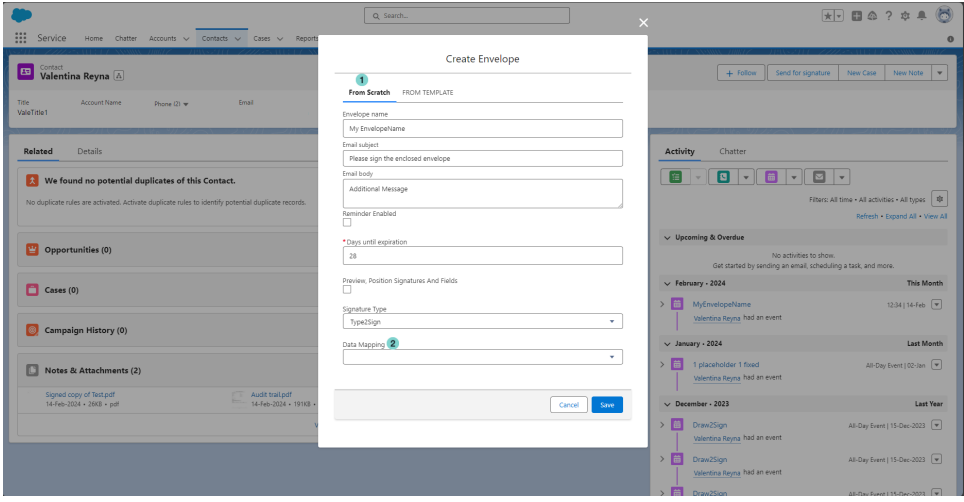
- Automatically add the Salesforce parent object as recipient (if configured in Recipient Settings).
  - Map your Salesforce object fields to eSAW document fields and vice-versa (if the data mapping is configured on this Salesforce object ).
  - Automatically store the signed document in eSAW (and audit trail file) in your Salesforce parent object.
- [Create New Envelope from Parent Record](#)
  - [Create a new Envelope from scratch](#)
    - [After the envelope creation, you will be redirected to the envelope detail](#)
  - [Create a new Envelope from Template](#)
    - [After the envelope creation, you will be redirected to the envelope detail.](#)

## Create New Envelope from Parent Record

From the Salesforce object that you want to use as parent record, click 'Send for Signature' button (if it's not visible, ask to your admin to configure it)

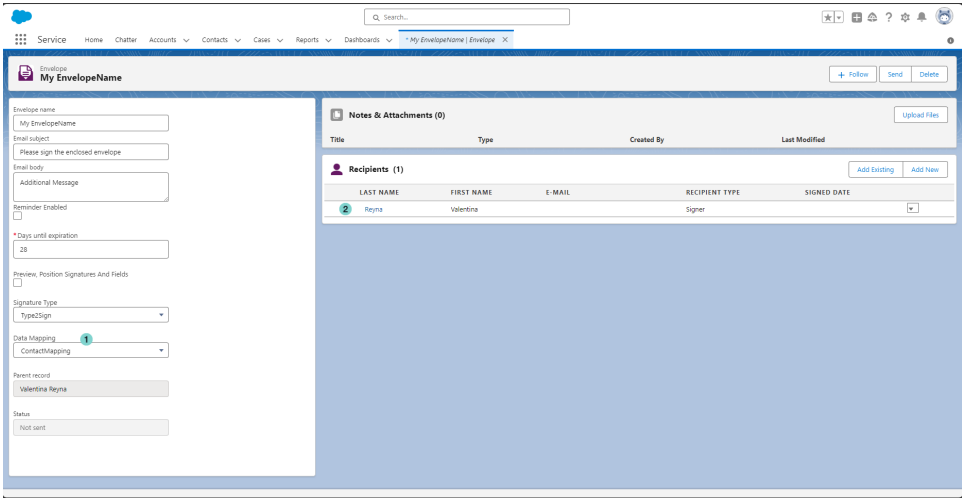
Figure	Description
	<ol style="list-style-type: none"><li>1. Send For Signature Button.</li><li>2. Signed Documents stored in the parent record.</li><li>3. Envelopes sent starting from the parent record.</li></ol>

## Create a new Envelope from scratch

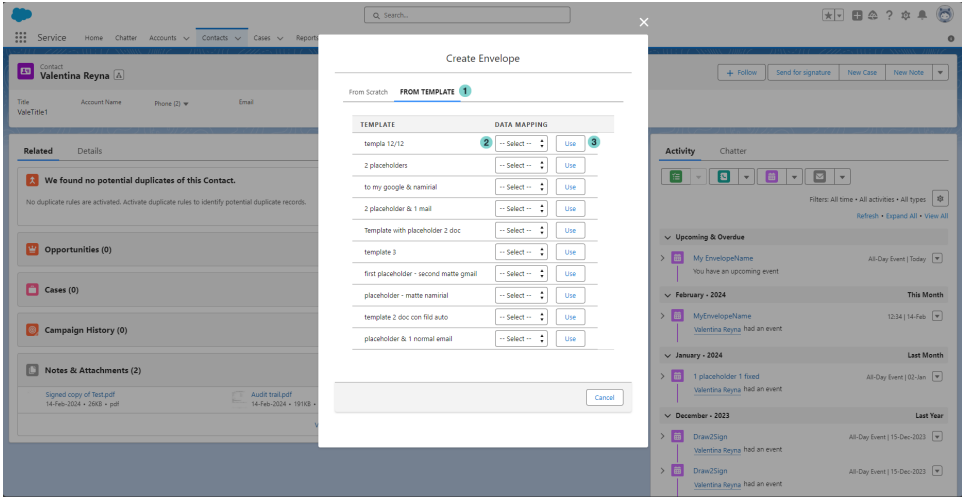
Figure	Description
	<ol style="list-style-type: none"><li>1. From Scratch tab</li><li>2. Choose the preconfigured data mapping that you want to use to map Salesforce data to eSAW envelope data (and vice-versa).</li></ol>

Please refer to Create New Envelope section to have detailed explanation of others fields.

After the envelope creation, you will be redirected to the envelope detail

Figure	Description
	<ol style="list-style-type: none"><li>1. The selected Data Mapping is shown and can be modified.</li><li>2. The contact is added as recipient by default.</li></ol>

## Create a new Envelope from Template

Figure	Description
	<ol style="list-style-type: none"><li>1. From Template tab.</li><li>2. Select the data mapping.</li><li>3. Click the 'Use' button to select the template.</li></ol>

After the envelope creation, you will be redirected to the envelope detail.

Figure	Description
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ServiceHomeChatterAccountsContactsCasesReportsDashboardsMy EnvelopeName | EnvelopeX2 placeholdersX

Search...

StarGridCalendarHelpSettingsUser

Envelope2 placeholdersFollowSendDelete

Envelope name2 placeholders

Recipients subjectPlease sign the enclosed envelope

Email bodyDear #RecipientFirstName# #RecipientLastName#

Reminder Enabled

Send a reminder to signers after receipt day(s)5

Continue to send reminders every day(s)3

Warn signers before request expires day(s)8

\*Days until expiration15

Review, Position Signatures And Fields

Signature TypeType2Sign

Data MappingContactMapping1

Parent recordValentina Rayna

Recipients (2)Add ExistingAdd New

	LAST NAME	FIRST NAME	E-MAIL	RECIPIENT TYPE	SIGNED DATE
^	Rayna	Valentina		Signer	
^	holder 2	place 2	place@holder.com	Signer	

1. The selected Data Mapping is shown and can be modified.
2. The first 'place@holder.com' signer in your eSAW template is replaced with the contact by default.