

Admin Guide - Salesforce Connector

After the eSignAnyWhere connector installation, a Salesforce admin user must apply some simple configurations before starting to use this app.

Mandatory configurations to enable your organization to use the connector:

- Configure the eSAW instance and defaults values in Application Setting tab - See also the [Application Settings](#) for detailed information.

Optional configurations useful to use the connector:

- Configure the info to automatically retrieve eSAW recipient from Salesforce Objects (note that Contact, Lead and User are preconfigured) - See also the Recipient Settings.
- Configure your eSAW instance to enable the signing of envelopes directly from the connector - See also the Host Sign Configuration.
- Configure "Send for Signature" action in Salesforce object that you want to use as starting point to send envelopes - See also the Sending Envelope From Parent Record Configuration.

Overview

- [Application Settings - Admin Guide - Salesforce Connector](#)
- [Permission Sets Configuration - Admin Guide - Salesforce Connector](#)
- [Recipient Settings - Admin Guide - Salesforce Connector](#)
- [Host Sign Configuration - Admin Guide - Salesforce Connector](#)
- [Sending Envelope From Parent Record Configuration - Admin Guide - Salesforce Connector](#)