

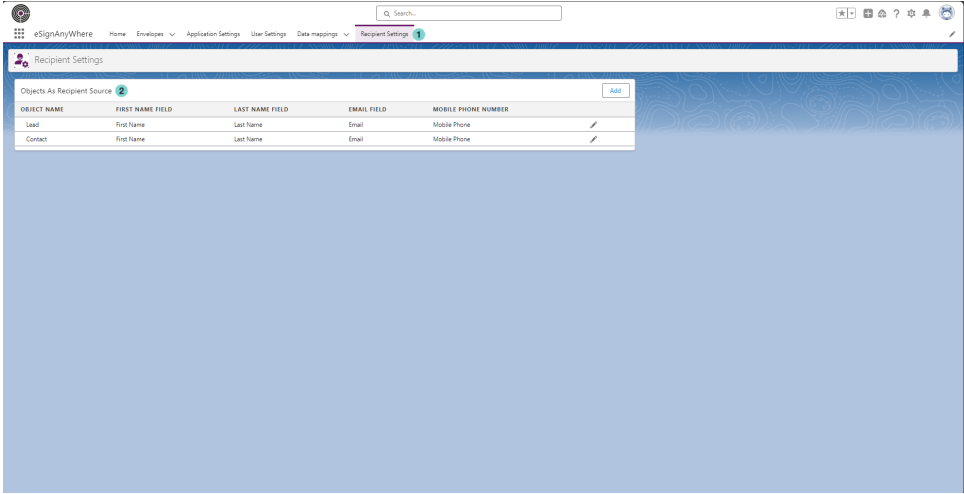
Recipient Settings - Admin Guide - Salesforce Connector

Following guide provides a thorough walkthrough on navigating the recipient settings within Salesforce. It outlines the process of locating recipients based on fields such as first name and last name. Furthermore, it elucidates the steps for creating a new recipient source and offers detailed instructions on configuring the newly created recipient source to suit your preferences.

- [Recipient Settings](#)
- [Create a new recipient source](#)
- [Configuration the Recipient Source](#)

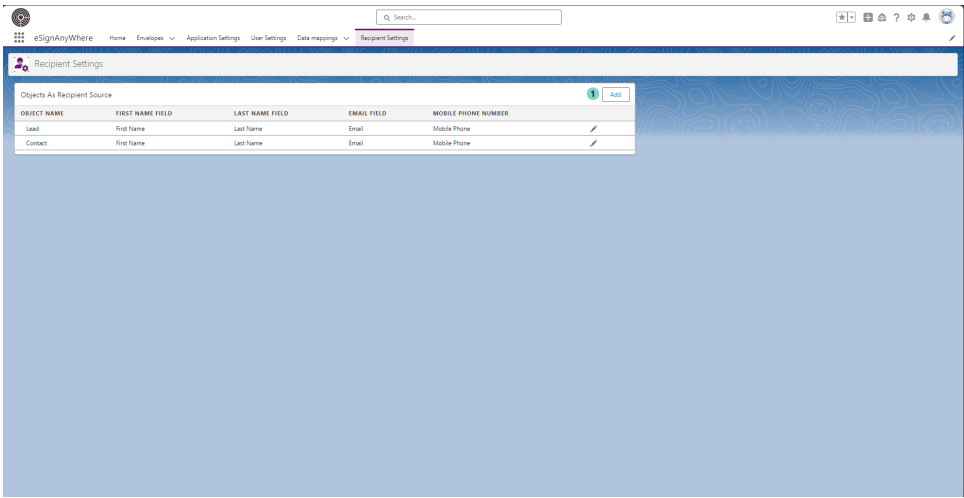
Recipient Settings

In Recipient Settings tab there is the list of the SalsForce objects preconfigured as recipient source:

| Figure | Description |
|---|---|
|  | <ol style="list-style-type: none">1. Recipient Settings tab2. Configured recipient sources |

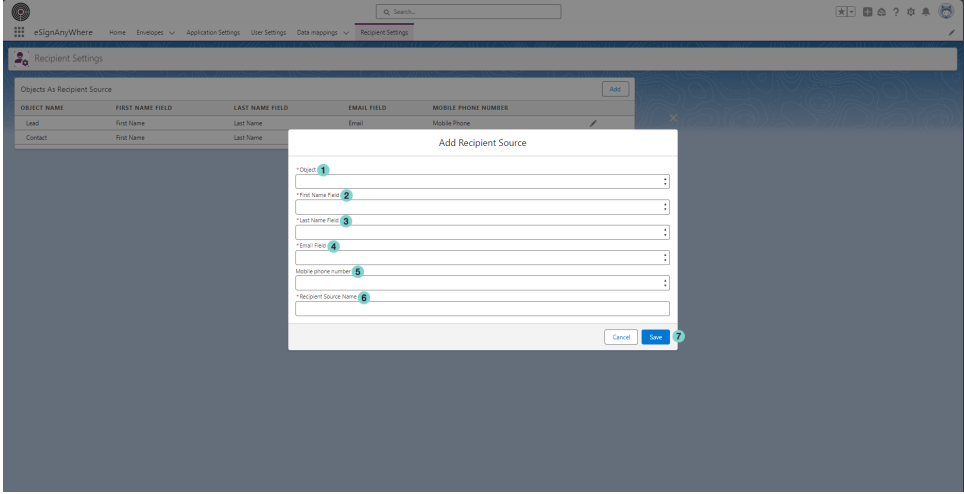
Create a new recipient source

Please see the next figure which shows how to add a new Recipient Source:

| Figure | Description |
|--|--|
|  | <ol style="list-style-type: none">1. Add new recipient source button |

Configuration the Recipient Source

See the next figure for how to configure the new Recipient Source:

| Figure | Description |
|--|---|
|  The screenshot shows the 'Recipient Settings' page in the eSignAnyWhere application. A modal dialog titled 'Add Recipient Source' is open in the center. The dialog contains six input fields, each with a green numbered callout: 1. 'Object' dropdown menu; 2. 'First Name Field' dropdown menu; 3. 'Last Name Field' dropdown menu; 4. 'Email Field' dropdown menu; 5. 'Mobile phone number' dropdown menu; 6. 'Recipient Source Name' text input field. At the bottom of the dialog are 'Cancel' and 'Save' buttons, with the 'Save' button having a green callout 7. In the background, a table titled 'Objects As Recipient Source' is visible, with columns: OBJECT NAME, FIRST NAME FIELD, LAST NAME FIELD, EMAIL FIELD, and MOBILE PHONE NUMBER. It lists 'Lead' and 'Contact' objects with their respective field mappings. | <ol style="list-style-type: none">1. The Salesforce object to use as recipient Source.2. The field of the chosen Salesforce object that must be used as first name of the envelope recipient.3. The field of the chosen Salesforce object that must be used as last name of the envelope recipient.4. The field of the chosen Salesforce object that must be used as email of the envelope recipient.5. The field of the chosen Salesforce object that must be used as mobile phone number of the envelope recipient.6. This is automatically populated with the name of the Salesforce object.7. Save Button |