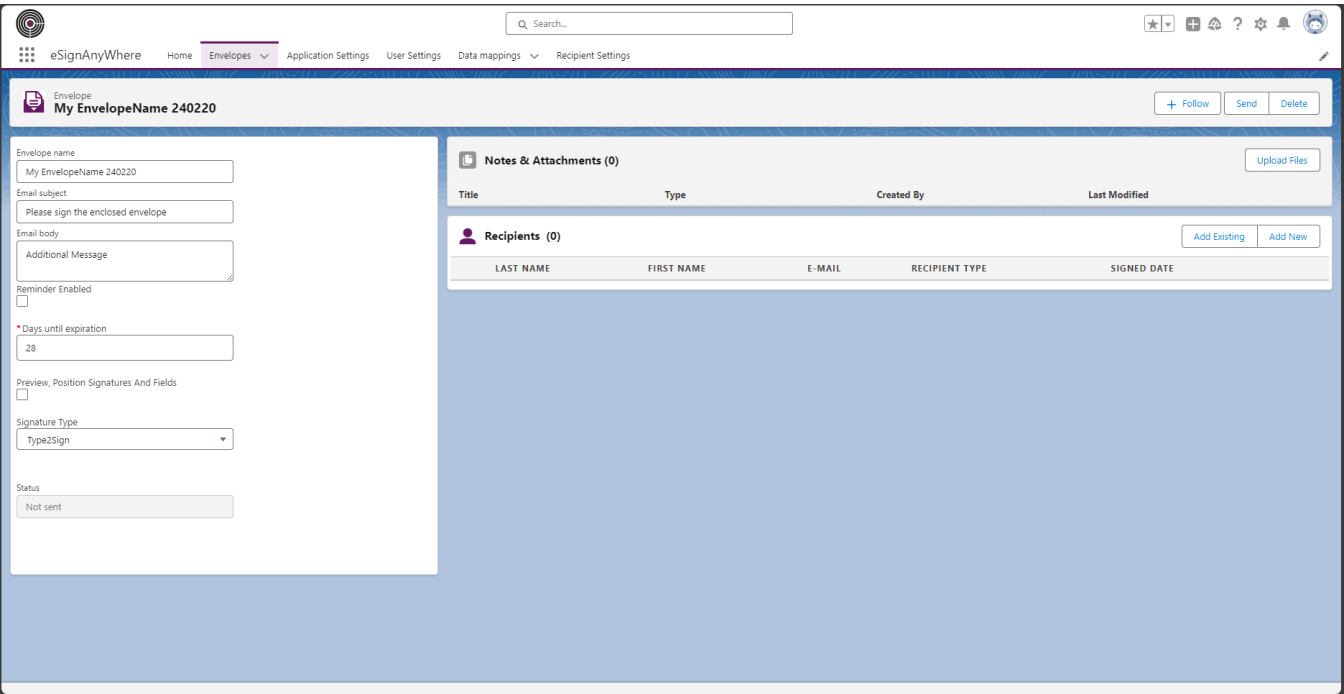


# Envelope Detail - User Guide - Salesforce Connector

This guide explains how to manage files to upload, how to manage recipients including how to add new and existing recipients as well as how to edit and detail recipients. Furthermore, you can find description of the different envelope actions.

- [Envelope detail](#)
- [Manage files to upload](#)
- [Manage recipients](#)
  - [Add a new recipient](#)
  - [Add existing recipient](#)
- [Add new recipient](#)
- [Edit and remove recipients](#)
- [Envelope Actions](#)

## Envelope detail



## Manage files to upload

if the envelope is still not sent to eSAW, you can upload new files or remove the already uploaded ones.

## Manage recipients

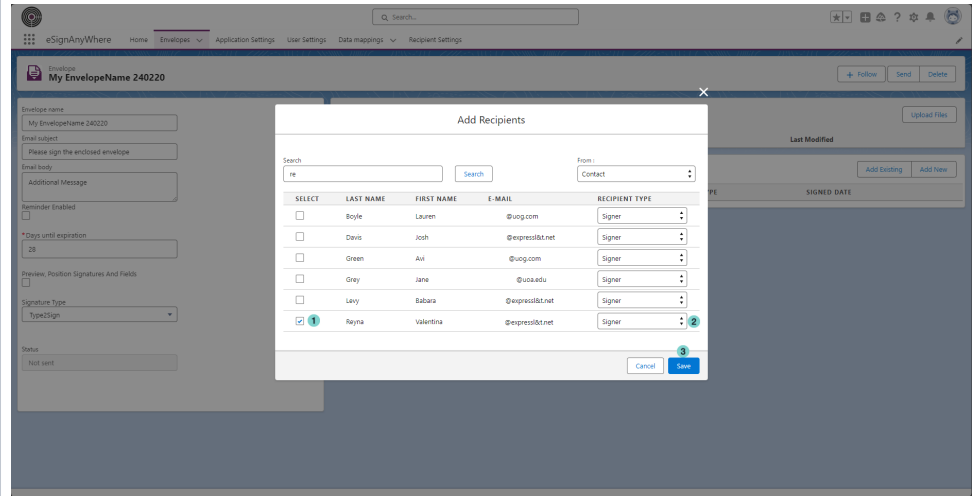
if the envelope is still not sent to eSAW, you can add - remove - update recipients.

### Add a new recipient

There are two way to add a recipients. Please see the following descriptions and figures:

Figure	Description
--------	-------------





1. Select the recipients that you want to add
2. Select the recipient type
3. Press 'Save' button

## Add new recipient

Figure	Description
	<ol style="list-style-type: none"><li>1. The last name of the recipient.</li><li>2. The first name of the recipient.</li><li>3. The email the recipient.</li><li>4. The eSAW recipient type of the recipient.</li><li>5. Chose this option to allow the delegation for this recipient.</li><li>6. Disable the email sending from eSAW to this recipient.</li><li>7. Select this option to require an authentication to open the envelope.</li><li>8. The language of the recipient.</li><li>9. Select this option to add the new created recipient to Salesforce contacts.</li><li>10. Save button</li></ol>

If 'Require Authentication' is selected, you must also choose the authentication Method

Figure	Description
--------	-------------

Recipient

\* Last Name

\* First Name

\* Email

Recipient Type  
Signer

Allow Delegation  
☐

Disable Email  
☐

Require Authentication <sup>1</sup>  
☒

Authentication Method <sup>2</sup>  
PIN

PIN code <sup>3</sup>

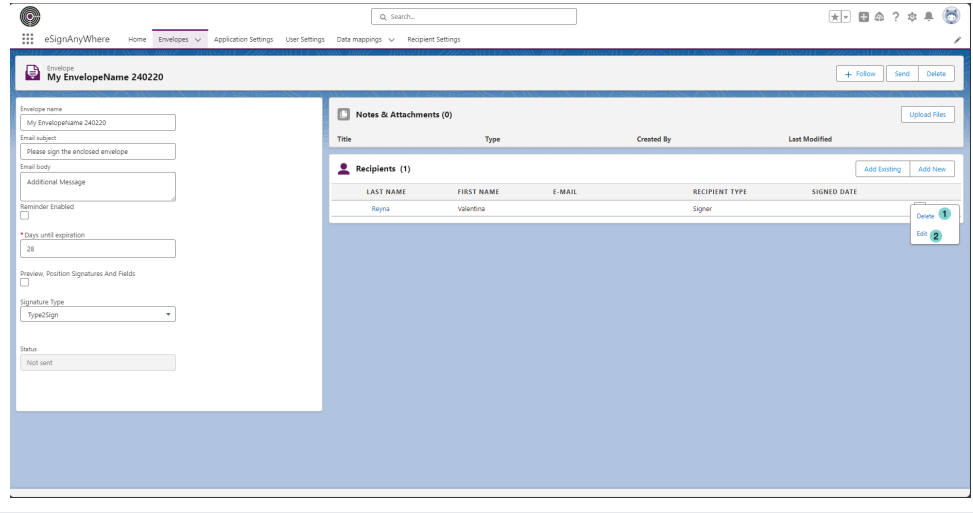
Language Code  
English

Add this recipient as contact  
☐

Cancel Save

1. 'Require Authentication' is enabled
2. Choose an authentication method
3. Fill Authentication additional info.

## Edit and remove recipients

Figure	Description
	<ol style="list-style-type: none"><li>1. Delete Recipient</li><li>2. Edit Recipient.</li></ol>

## Envelope Actions

the possible actions that can be performed on an envelope are visible on top of the envelope detail: (different action are available on different envelope status

Figure	Description
--------	-------------

eSignAnyWhere

Home

Envelope

Application Settings

User Settings

Data mappings

Recipient Settings

Search...

Envelope

My EnvelopeName 240220

+ Follow

Send

Delete

Envelope name

My EnvelopeName 240220

Email subject

Please sign the enclosed envelope

Email body

Additional Message

Reminder Enabled

☐

\*Days until expiration

28

Preview, Position Signatures And Fields

☐

Signature Type

Type2Sign

Status

Not sent

Notes & Attachments (1)

Upload Files

Title	Type	Created By	Last Modified
Test	File	Dev Admin	20/02/2024 16:11

View All

Recipients (1)

Add Existing

Add New

LAST NAME	FIRST NAME	E-MAIL	RECIPIENT TYPE	SIGNED DATE
Rayna	Valentina		Signer	

- Send the envelope in eSAW
- Delete the envelope in eSAW and Salesforce.

eSignAnyWhere

Home

Envelope

Application Settings

User Settings

Data mappings

Recipient Settings

Search...

Envelope

Template 1

+ Follow

Restart

Delete

Envelope name

Template 1

Email subject

Please sign the enclosed envelope

Email body

Dear #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)

5

\*Days until expiration

28

Preview, Position Signatures And Fields

☐

Signature Type

Type2Sign

Template

Template 1

Status

Restarted

Recipients (2)

LAST NAME	FIRST NAME	E-MAIL	RECIPIENT TYPE	SIGNED DATE
Rayna	Valentina	@uug.com	Signer	
Olivia	Liz	@uug.com	Signer	

- Restart an expired envelope in eSAW

eSignAnyWhere

Home

Envelope

Application Settings

User Settings

Data mappings

Recipient Settings

Search...

Envelope

Template 1

+ Follow

Update

Send Reminder

Cancel

Sign

Delete

Envelope name

Template 1

Email subject

Please sign the enclosed envelope

Email body

Dear #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)

5

\*Days until expiration

28

Preview, Position Signatures And Fields

☐

Signature Type

Type2Sign

Data Mapping

Contact Title

Parent record

Valentina Rayna

Recipients (1)

LAST NAME	FIRST NAME	E-MAIL	RECIPIENT TYPE	SIGNED DATE
Rayna	Valentina		Signer	

- Update the envelope from eSAW instance.
- Send a mail reminder to the envelope signer.
- Cancel the envelope in eSAW.
- Sign the envelope directly in Salesforce connector.

