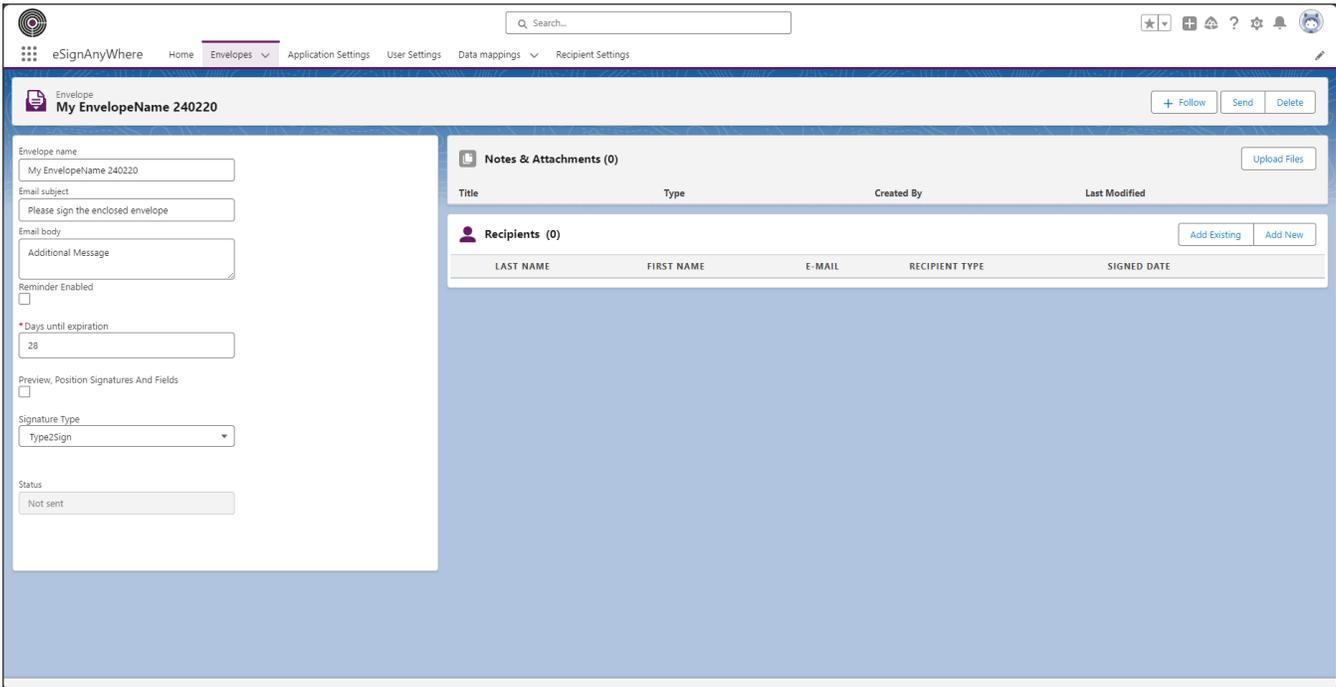


Envelope Detail - User Guide - Salesforce Connector

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.

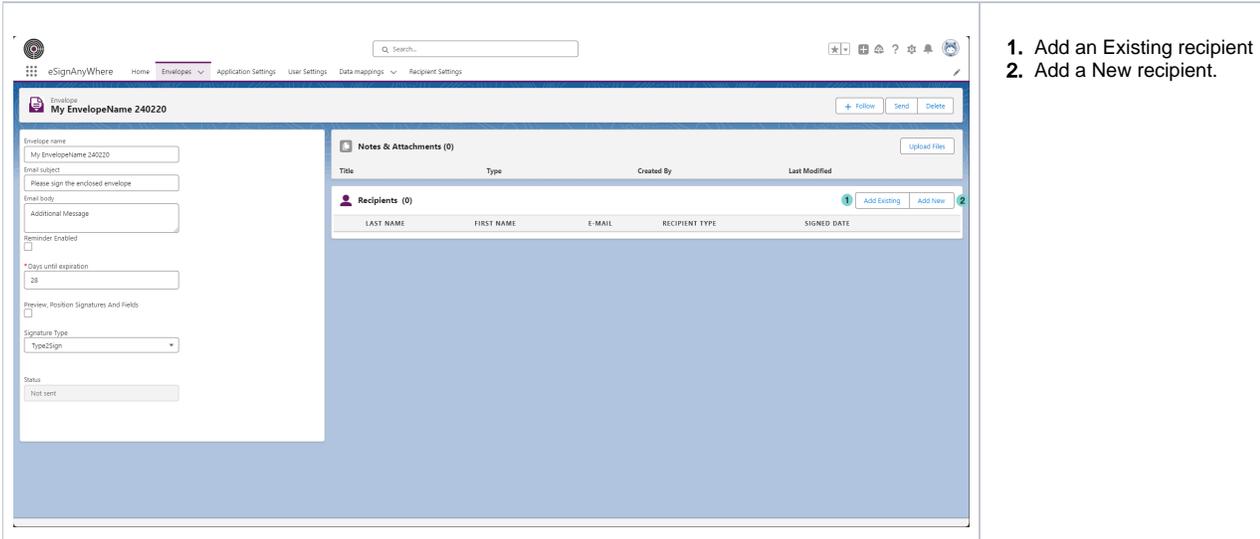
Manage recipients

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
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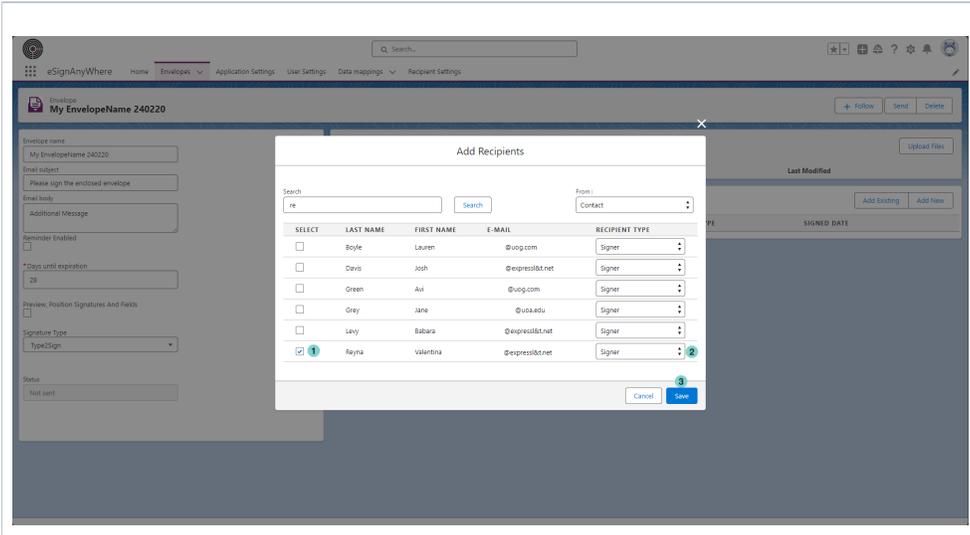
1. Add an Existing recipient
2. Add a New recipient.

Add existing recipient

Figure	Description
	<ol style="list-style-type: none"> 1. Chose the 'From' Salesforce object where you want retrieve the recipient. 2. Fill the 'Search' field to filter the result and 3. Press 'Search' button.

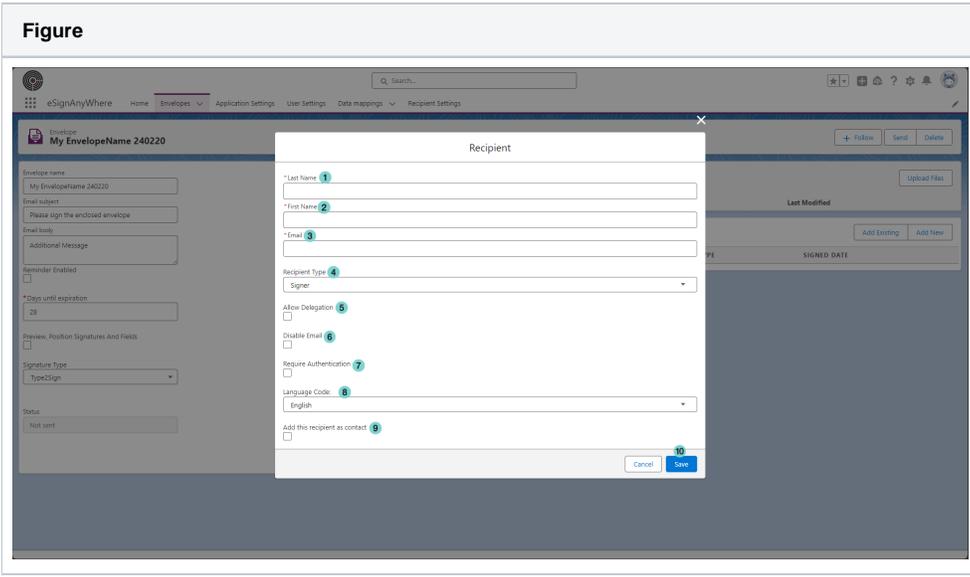
Select the recipients to add

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

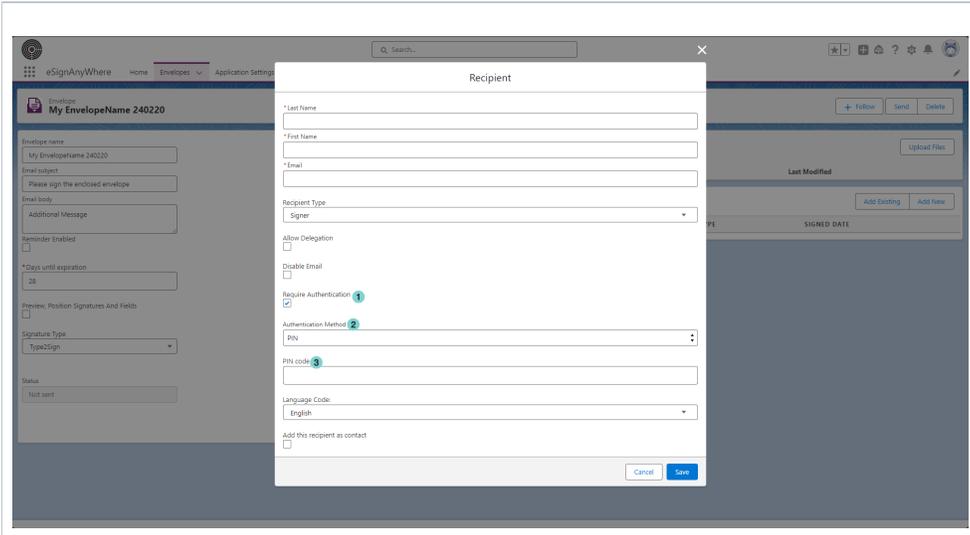
Add new recipient



- Figure**
- Description**
1. The last name of the recipient.
 2. The first name of the recipient.
 3. The email the recipient.
 4. The eSAW recipient type of the recipient.
 5. Chose this option to allow the delegation for this recipient.
 6. Disable the email sending from eSAW to this recipient.
 7. Select this option to require an authentication to open the envelope.
 8. The language of the recipient.
 9. Select this option to add the new created recipient to Salesforce contacts.
 10. Save button

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

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

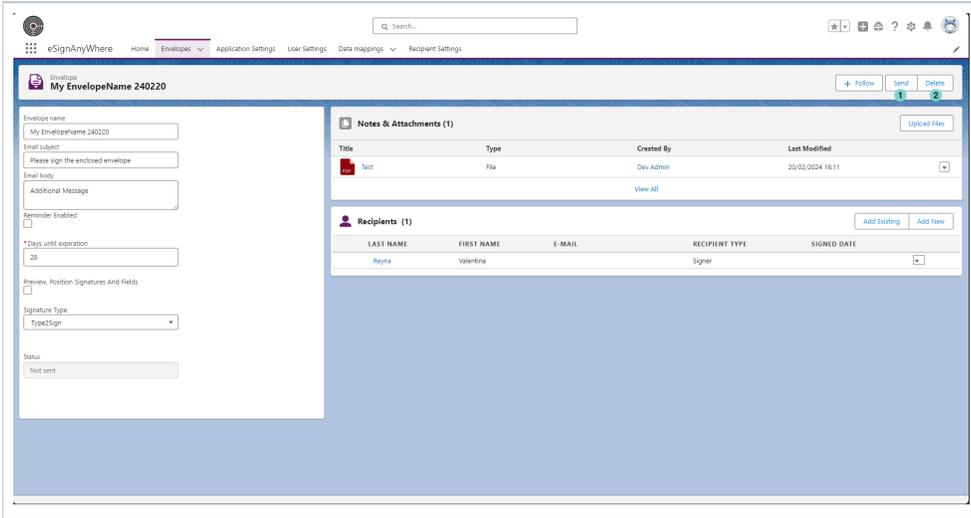
Edit and remove recipients

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

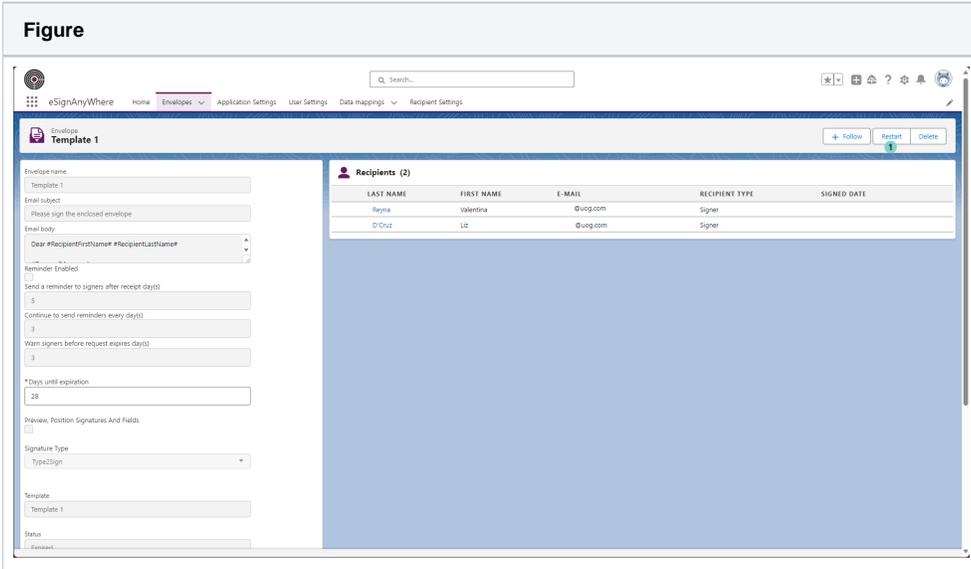
Envelope Actions

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
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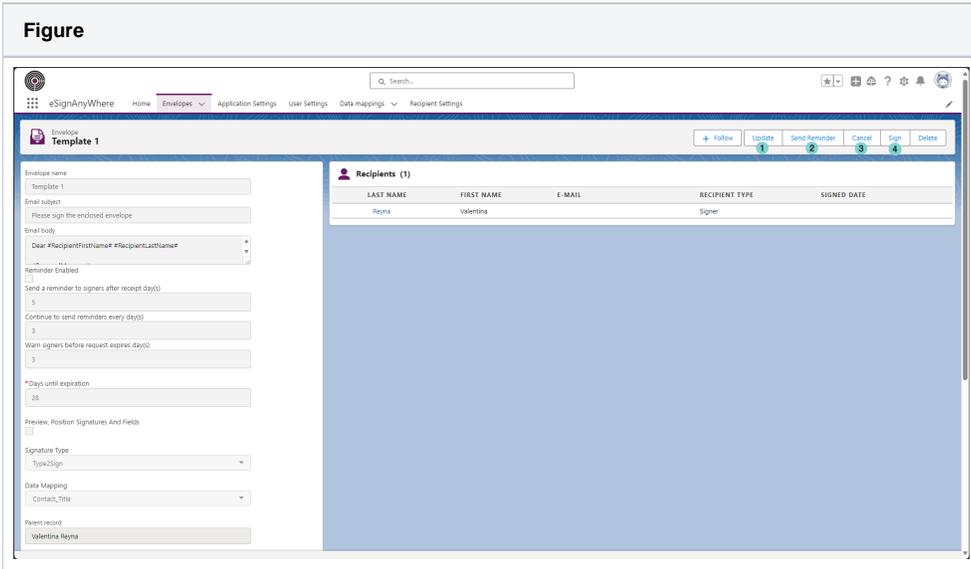


1. Send the envelope in eSAW
2. Delete the envelope in eSAW and Salesforce.



Description

1. Restart an expired envelope in eSAW



Description

1. Update the envelope from eSAW instance.
2. Send a mail reminder to the envelope signer.
3. Cancel the envelope in eSAW.
4. Sign the envelope directly in Salesforce connector.

