Sending Envelope From Parent Record Configuration -Admin Guide - SalesForce Connector

To send an envelope starting from a Salesforce object, you have to configure it following these steps:

Open Setup



Open 'Object Manager'

Figure				Description
Setup Home Obje	Q, Seech Setu	p	······································	 Type 'Object' in search field Click 'Object Manager' option
Q. object 1 V Deta Big Objects V Feature Settings V Topics	More Home			
Topics for Objects V Einstein Objects to Aways Search (Bata) V Objects and Fields Object Manager (2)	Contract of the second of the	Labelle Publisher Une the Motion Fuldment is contain pur can ibranded motion ago.	El-line Calaborative Des Burden patiently who calaborative and patients	
Picklist Value Sets Schema Builder V Integrations	Get Started	Learn More d ^a	Get Started 18	
External Objects Didn't find what you're looking for? Try using Global Search.	Most Recently Used 10 Items NAME	TYPE	08/6	ici -
	Data mapping item Application settings	Custom Object Definition		
	Envelope	Custom Object Definition		
	Deta mapping	Custom Object Definition		
	Supportorce Dev Admin	Lustom App		
	SFDC_DevCensole	Debug Level		
	Languages	Custom Field Definition	Cont	act v

• Choose the Salesforce object to configure as starting point to send envelope

Figure	Description
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Setup Hore OpenManger v	Q. Sa	nh Salag	Dillet Z Dillocation Q. Quick Find	★▼ 翻会? 卒 皋(Schens Builder Crasts ▼	 Click on the Salesforce object that you want to configure as starting point to send envelope. In the sample: 'Contact'
Asset State Period	AssetStatePeriod	Standard Object			
Associated Location	AssociatedLocation	Standard Object			
Authorization Form	AuthorizationForm	Standard Object			
Authorization Form Consent	AuthorizationFormConsent	Standard Object			
Authorization Form Data Use	AuthorizationFormDataUse	Standard Object			
Authorization Form Text	AuthorizationFormText	Standard Object			
Business Brand	Business8rand	Standard Object			
Campaign	Campaign	Standard Object			
Campaign Member	CampaignMember	Standard Object			
Card Payment Method	CardPaymentMethod	Standard Object			
Case	Case	Standard Object			
Communication Subscription	CommSubscription	Standard Object			
Communication Subscription Channel Type	CommSubscriptionChannelType	Standard Object			
Communication Subscription Consent	CommSubscriptionConsent	Standard Object			
Communication Subscription Timing	CommSubscriptionTiming	Standard Object			
Consumption Rate	ConsumptionRate	Standard Object			
Consumption Schedule	ConsumptionSchedule	Standard Object			
Contact	Contact	Standard Object			
Contact Point Address	ContactPointAddress	Standard Object			
Contact Point Consent	ContactPointConsent	Standard Object			
Contact Point Email	ContactPointEmail	Standard Object			
Contact Point Phone	ContactPointPhone	Standard Object			
Contact Point Type Consent	ContactPointTypeConsent	Standard Object			*

• Verify if you have the 'Send For Signature' action in your Object

igure							Description
Setup Home Obje	st Manager 🗸	Q. Search Setup				🖩 🎄 ? 🌣 🖡 🐻	 Select the 'Buttons, Link and Actions' Verify if you have the 'Send for Signature' actions'
SETUP > OBJECT MANAGER Contact	Buttons, Links, and Actions	2			Q. Quick Find	Action New Button or Link	in the list. If you already have the button configured, go directly to
Fields & Relationships	LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE OVERR	IDDEN A	the step: 'Choose the
Page Layouts	Add to Call List	MassCreateCallList			Standard page		layout where you want to
Lightning Record Pages	Add to Call List	CreateCall ist			Stanifard nane		add the 'Send for
Buttons, Links, and Actions 🧻							Signature' button'
Compact Layouts	Add to Campaign	AddToCampaign			Standard page	•	3. Add a new action
Field Sets	Add to Campaign	AddCampaign			Standard page	•	
Object Limits	Check for New Data	XClean			Standard page	•	
Record Types Related Lookup Filters	Clone	Clone			Standard page	•	
Search Layouts	Contacts Tab	Tab			Standard page	•	
List View Button Layout	Delete	Delete			Standard page		
Triggers	Edit	Edit			Standard page	•	
Flow Triggers	Get Survey Invitation	CreateSurveyInvitation			Standard page	•	
Validation Rules	List	List			Standard page	•	
	New	NewContact			Standard page	v v	

• Create the new 'Send For Signature' action.



Choose the layout where you want to add the 'Send for Signature' button

Figure				Description
				1. Click on 'Page Layout'
_		Q, Search Setup		2. Choose the layout where
Setup Home Obj	ject Manager V	THE FEANNING THE PRINT PRIME TO A SUBJECT AND A	IIIIV = IIIV + III + ZZZZ + VII + UNANNA IIIIIZ = IIIV + UNANNA IIIIZZZZZZZZZZZZZZZZZZZZZZZZZZZZZZ	you want to add the 'Sene for Signature' button
Sector Contact	AND AN IN 7 PASSO			
Details	Page Layouts 4 Items, Sorted by Page Layout Name		Q. Quide Fin	nd New Page Layout Assignment
Helds & Heldbortships	PAGE LAYOUT NAME	 CREATED BY 	MODIFIED BY	
Linitring Record Pages	Contact (Marketing) Layout	Dev Admin, 02/07/2019 14:07	Dev Admin, 02/07/2019 14:07	•
Buttons, Links, and Actions	Contact (Sales) Layout	Dev Admin, 02/07/2019 14:07	Dev Admin, 02/07/2019 14:07	
Compact Layouts	Contact (Support) Layout	Dev Admin, 02/07/2019 14:07	Dev Admin, 02/07/2019 14:07	v
Field Sets	Contact Layout (2)	Dev Admin, 02/07/2019 14:07	Dev Admin, 29/07/2019 09/28	
Object Limits				
Record Types				
Related Lookup Filters				
Search Layouts				
Hierarchy Columns				
Triggers				
Flow Triggers				
Validation Rules				

• Drag and Drop the 'Send for Signature' button

Figure				Description
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Recel Types Resel Lisson Films Easten Lisson List Vere Natura Lipson Filmenty Calanne Tagger Tagger Validation Rules	Context Action and Act	The Name Cost Link Pail Garden. Deal The Name Cost Link Pail Garden. Deal The Name Cost Link Pail Garden Paul Monte Teal Paul Cost Deal Teal Paul Cost Deal Deal Cost Deal Paul Deal Cost Deal Paul Deal Paul Cost Deal Paul Cost Deal	In Agence Store Name Kell Brite Drang Dawn Samp Samplitanith Girl Lang Institution (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Samp Samplitanith (Send Unit Markilla) Addit Cal Lin Problem Ver- Addit Addit Ad	

• Save the configuration

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Setup Home Ob	bject Manager 🗸 🗸					Liahtnina	Experience
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SETUP > OBJECT MANAGER	R					Actions' s	ection
Contact						2 Click Sov	o Button
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ds & Relationships	Fields A Quick Fiel Mobile Action Name @						
	Buttons Add to an Actiona Change Record Type	Delete File Mobile Smart Actions New Event New	Opportunity Printable View Send Text	Submit for Approval			
je Layouts	Mobile & Lightning Call List Check for New Data	Edit Get Survey Inita. New Account New Group New Enal Link New Cross New Case	Task Question Sharing Saud for simulary Sharing Klaravshy	Update Contact View Contact Vier			
ntning Record Pages	Expanded Lookups Change Owner Create Summary	Email (mobile only) Log a Call New Contact New Note Post	Send Survey Start Conversation				
tone Links and Actions	Related Lists						
AT 0, ET 102, ET 10 142441 12		•					
spact Layouts	Conduct Encode						
d Sets	Contact sample						
	Highlights Panel						
ect Limits	Customize the highlights panel for this page layout						
ord Types							
and the stress Pileses	Quick Actions in the Salesforce Classic Publisher						
	Post File New Task Log a Call New	2468 New Note New Event Link Poll Question	Email				
View Button Laurut	Salesforce Mobile and Lightning Experience Actions						
the second system	1 Send for signature Post File New Task	Log a Call New Case New Nate New Event Link P	all Question Ernal Submit for Acon	aval Clone Sharing	Full Delete		
archy Columns	Change Owner Change Record Type Check for New Date	a Call Send Text Email (mobile only)					
aers							
-	Contact Detail	Standard Butons					
/ Inggers		Charge Record Type Sand Survey Lot Dents I Yow Contact Herstony	Cone (change owner) (sharing hersiche) (det sune	VINVERSON CHIEVEN USES ADD TO CAR	List Printable wave		
Jation Rules		Start Conversation (web to an Actionative List) (Create Summary)					
	Contact Information (Header visible on edit only) Contact Owner Sample Text		Phone 1-415-555-1212				
	 Name Sarah Sample 		Home Phone 1-415-555-1212				
	Account Name Sample Text Title Sample Text		Mobile 1-415-555-1212 Other Phane 1-415-555-1212				
	Department Sample Text		Pax 1-415-555-1212				
	Birthelate 20/02/2024 Benerits To Standa Taut		Ewail sarsh.sample@company.com Assistant Sancia Teur				
	Page-14 10		Carrieri annue ini				

• Navigate to configured object, now the 'send for Signature' button is configured and visible.

Figure		Description
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Contas Valentina Reyna A	+ Folos Serd for signature New Case New Note V	
Tite Accurt furre Prove © v final Contact Over Walt fiel ∰ Wetters Bryce &		
Related Details Image: Second no potential duplicates of this Contact. Image: Second no potential duplicates of this Contact.	Activity Chatter	
No deploate rolen av activated. Activate deploate rolen to identify potential deploate vecends.	Filten: All time - All activities - All types 🕸 Refeash - Espand All - View All	
C Opportunities (0)	Upcoming & Overdue No activities to show. Get started by sending an email, scheduling a task, and more.	
Cases (0)	February • 2024 This Meeth B MyEnvelopeName 1524/14-Feb	
Campaign History (0)	Valentina Reyna had an event January • 2024 Last Month	
Notes & Attachments (2)	To placeholder 1 fixed Al-Day Event 02-Jan Valentina Royna had an event	
Signed copy of Testpolt 44-res-3004 - 2648 - port 44-res-2004 - 19110 - port	✓ December + 2023 Last Year	
VerAl	Craw2Sign Al-Day Event 15-Dec-2023 Valentina Reyna had an event	
	Craw2Sign All-Day Event 15-Dec-2023 Valentina Reyna had an event	
	Craw2Sign All-Day Event 15-Dec-2023 Valentina Reyna had an event	
	Draw2Sign Al-Day Event 15-Dec-2023 Valentina Reyna had an event Valentina Reyna	