DocuSign Connect for Salesforce Guide

DocuSign for Salesforce Administrator Guide 10222012

If you have any comments or feedback on our documentation, please send them to us at: Documentation@DocuSign.com.

Summary of changes for this version:

- Updated procedures for accessing the DocuSign console to reflect changes in the DocuSign for Salesforce Admin tab.

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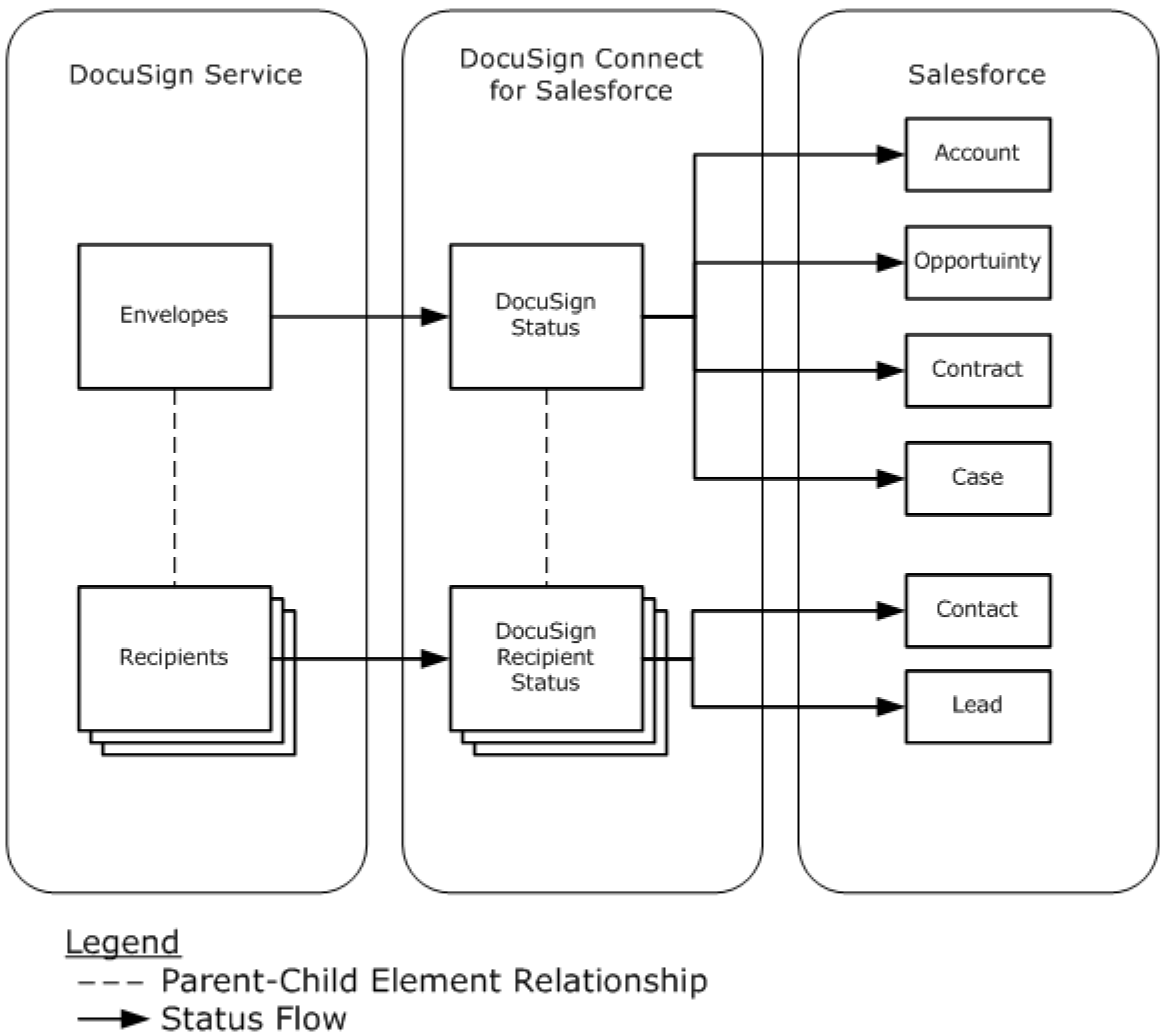
Overview

DocuSign Connect for Salesforce sets up a connection between your Salesforce account and DocuSign, so that changes in DocuSign envelope and recipient status are updated in your Salesforce account. Whenever selected events occur for an envelope, DocuSign connects to Salesforce (using credentials that you provide) and updates a status record.

In the default DocuSign for Salesforce installation, DocuSign adds two custom objects that update envelope status and recipient status in Salesforce.

You can also customize DocuSign Connect for Salesforce by associating DocuSign objects with Salesforce objects, so that DocuSign Connect for Salesforce updates or inserts the information in to the Salesforce object.

Data Mapping Schematic for DocuSign Connect and Salesforce



Real Time Data and Updates in Salesforce

With DocuSign Connect for Salesforce set up, you will see the updates in Salesforce about 20-30 seconds after the data changes or an event occurs in the DocuSign service.

If you are changing your DocuSign Connect for Salesforce settings by adding Connect Objects, you might want to test the configuration using a DocuSign DEMO account since it points to the Salesforce ‘sandbox’ accounts and won’t affect your production account.

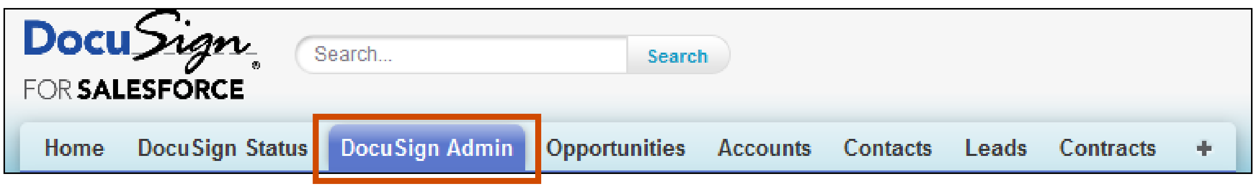
DocuSign Connect for Salesforce Settings

When DocuSign for Salesforce is installed, DocuSign Connect for Salesforce is set up for your system and two Connect Objects, one that updates envelope status and documents and one that updates recipient status, are added.

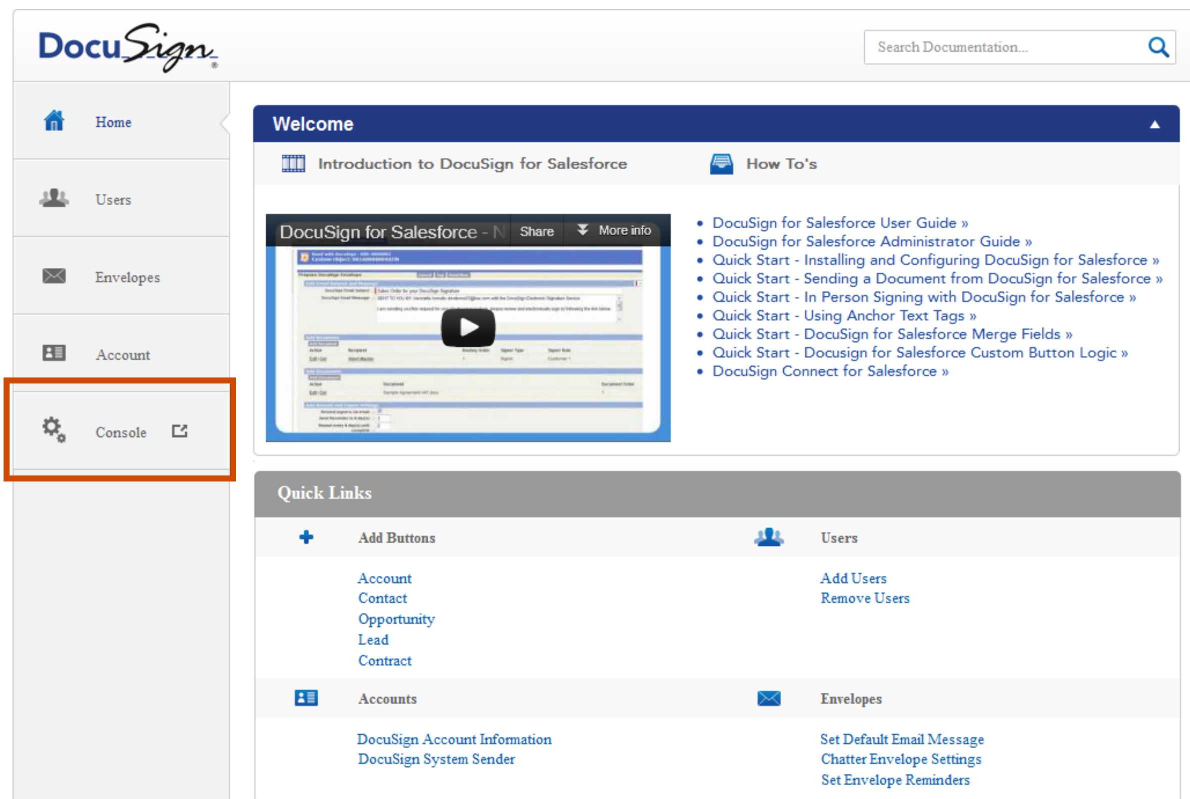
Changing DocuSign Connect for Salesforce Settings

Note: DocuSign recommends that you download the DocuSign Connect for Salesforce configuration xml file before making changes to your settings. This way it is easy to restore your current settings if there is an issue with any changes you make. See Downloading and Uploading your DocuSign Connect for Salesforce Settings for more information.

1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. Click the **DocuSign Admin** tab.



Click the **Console** tab, the DocuSign web console opens in a new browser window.

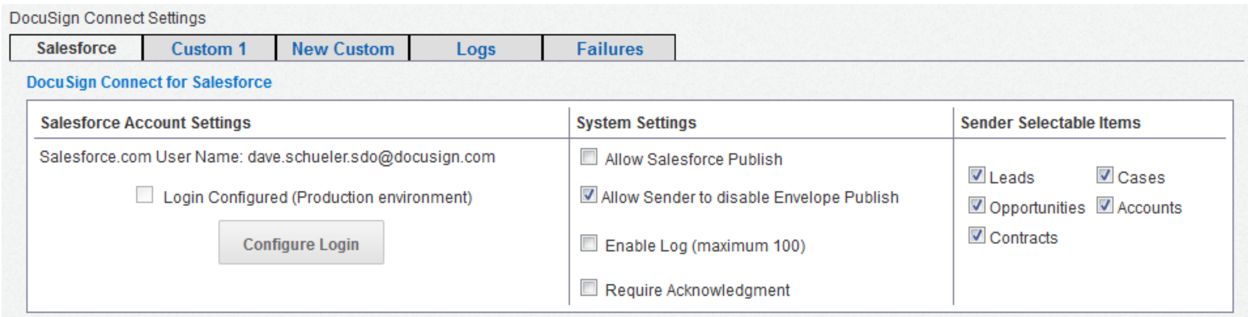


3. From the DocuSign Console, click you profile image at the top of the console and select **Preferences**.

   The DocuSign Account Preferences page is displayed.

4. In the Navigation Panel on the left side, under the Account Administration section, click **Connect**. The DocuSign Connect Settings page is displayed. Verify the **Salesforce** tab is selected.

5. Review the DocuSign Connect for Salesforce setting in the upper portion of the page and change them as needed.



   Salesforce Account Settings: During the installation the connect settings are configured for your account. If you want to change your Salesforce Account Settings, see the Changing your DocuSign Connect for Salesforce Account Settings procedure.

   System Settings: This section sets the general system Connect settings. The settings are described below:

   - **Allow Salesforce Publish:** This option is selected by default. When this option is selected, data is sent to the designated Salesforce account. Clear this option to stop sending data while maintaining the custom information.
   - **Allow Sender to disable Envelope Publish:** This option allows a sender to disable sending data for the current envelope. This setting is not selected by default.
   - **Enable Log:** Select this option to enable logging for this connection. If you do not want to enable logging for this connection, clear this box, but it is recommended that you enable this option to facilitate troubleshooting any problems. You can have a maximum of 100 active logs for your account. The entries in active logs can be viewed by clicking the **Logs** tab.
   - **Require Acknowledgement:** Select this option to log posting failures. The acknowledgement failure messages are logged in the **Failures** tab. This setting is not selected by default.

     When the **Require Acknowledgement** option is selected and a publication message fails to be acknowledged, the message goes back into the queue and the system will retry delivery after a successful acknowledgement is received. If the delivery fails a second time, the message is not returned to the queue for sending until Connect receives a successful acknowledgement and it has been at least 24 hours since the previous retry. There is a maximum of ten retries.

     You can view the list of Connect publish failures by going to the **Failures** tab and you can manually republish these items from the **Failures** tab.

   Sender Selectable Items: This section sets the items available for selection when adding or editing Connect Objects.

6. Select Events and Users to track.

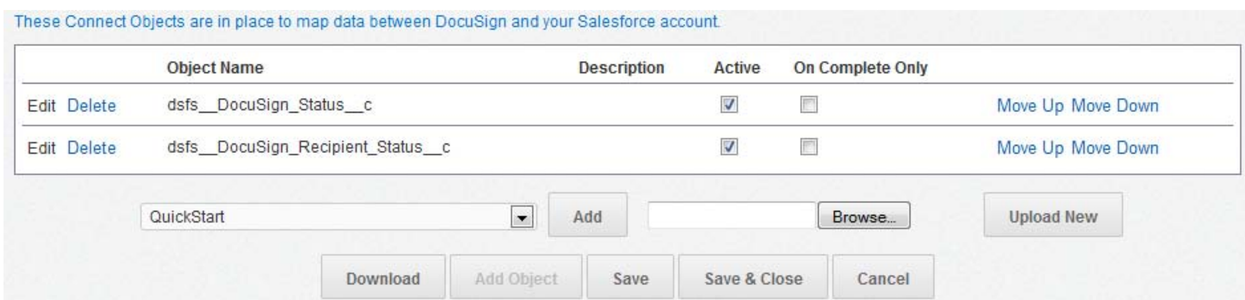
Select the events you wish to use as triggers for status updates. These events include envelope status events as well as recipient activity events.

You can select any number of events. Updates to the same envelope will change the status or information as the transaction progresses, so if you choose to get updates for sent, delivered, signed, and you have multiple signers, data fields mapped to Salesforce will be updated as the transaction progresses.

You can select the users in your account that trigger events. If users are not selected, their transactions will not generate update events into Salesforce. You can select **All users integrated**, which selects all the current users and adds new users when they are added to the account (**All users integrated** is not selected when initially setting up Connect).

7. To edit, add, delete or change the order of Connect Objects.

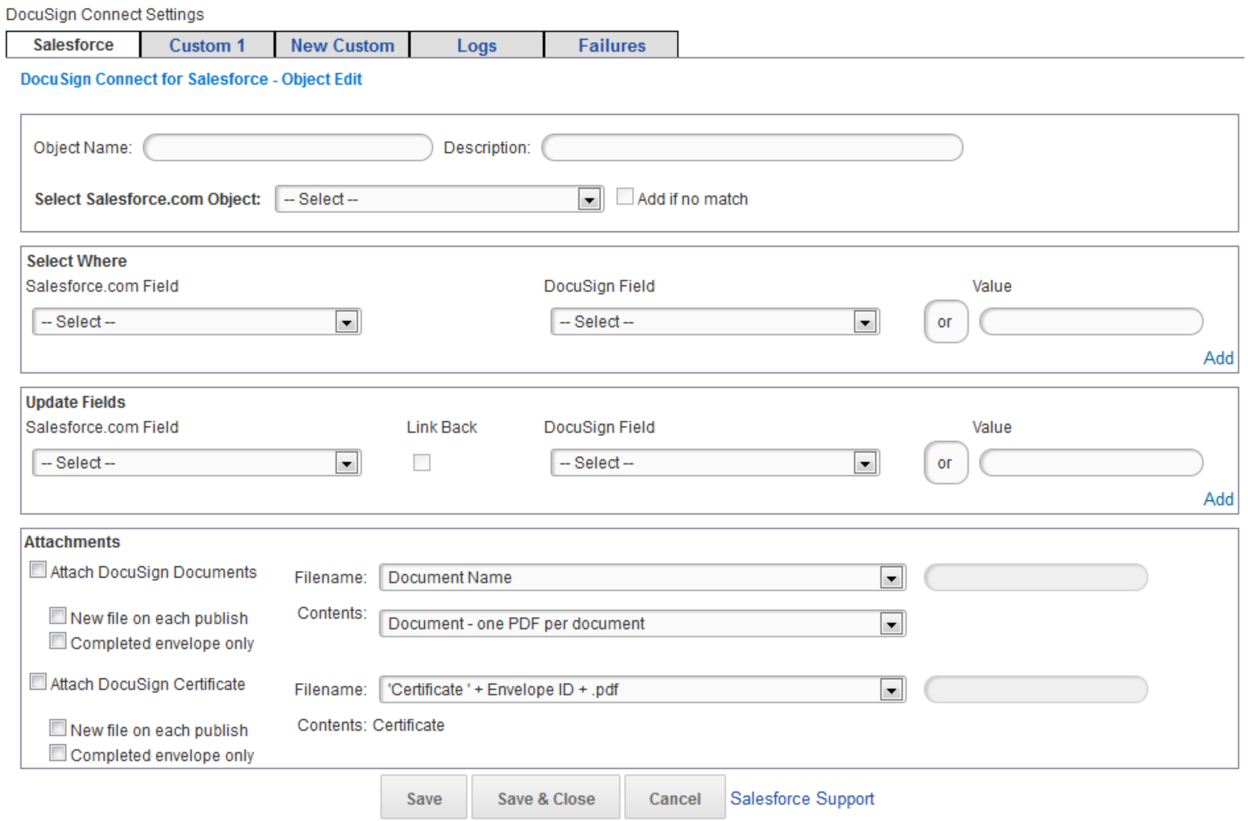
The current list of Connect Objects is shown at the bottom of the page. These objects are used to map data between DocuSign and your Salesforce account.



<u>To change the order of Connect Objects:</u> Use the **Move Up** or **Move Down** links to change the order in which the Connect Objects are resolved. DocuSign Connect for Salesforce completes updates for the Connect Object from the top of the list to the bottom of the list. It is important to have your objects arranged in the correct to ensure information is updated in the correct order.

<u>To edit an object:</u> Click the **Edit** link adjacent to the object you want to edit. The DocuSign for Salesforce Object Edit page for the object is displayed. Follow the procedure for adding a new object to edit the object.

To add a new object: Click **Add Object**, the DocuSign for Salesforce Object Edit page is displayed:



- Type the **Object Name** and **Description** for the new object. These are reminders for you about the function of this Connect Object, but do not affect the object.

  Use the **Select the Salesforce.com Object** list to select the Salesforce object for data mapping. This auto-populates data from your Salesforce account into the Salesforce.com Field lists used to configure the object.

  Select the **Add if no match** checkbox to create a new record if a match is not found in Salesforce.

- In the Select Where section, select the Salesforce and DocuSign fields that are used to match a Salesforce object with DocuSign information so that the system knows when to send updates to Salesforce.

  Example: If the selected fields to match are Envelope ID, so the first time an envelope is sent DocuSign a new envelope record is created (since Envelope IDs are unique). For subsequent changes, the Envelope ID will match the envelope record and updates for that envelope are sent to Salesforce.

> **Note:** It is possible to have multiple rows of Select Where items. This allows an update to happen only if multiple conditions are true such as a match on company name *and* contract type or some other value you track. These are AND functions, so if they are not all true, the update will not happen.
>
> To add another Select Where row; select you first match criteria, click **Save** at the bottom of the page, click the **Add** link in the Select Where section and then select the other match criteria.

- The Select Fields section is used to select the fields updated in Salesforce and the corresponding DocuSign field used to update it.

  If you select *Recipient Secure Field* as the DocuSign Field, a new field appears adjacent to the list. Type the **Label** of the DocuSign custom tag (SecureField) used to capture information during the signing process.

  The **Link Back** option provides a URL that links to the information in the DocuSign field. This option is not available for all Salesforce.com field types.

  To add another Select Fields row, click **Save** at the bottom of the page, click the **Add** link in the Select Fields section and then select the Salesforce and DocuSign fields.

  Note: If a Salesforce object has required fields and a new record is being created, all of these fields must be populated or the object will not be added.

- Select any **Attachments** that are sent to Salesforce and when the attachments are sent.
- Click **Save & Close** to save the object and return to the DocuSign Connect for Salesforce page.

8. After making the needed changes to your DocuSign Connect for Salesforce setting, click **Save** or **Save & Close** to save the changes.

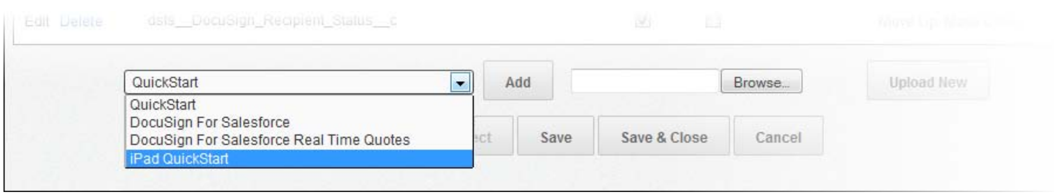
After verifying that the DocuSign Connect for Salesforce settings function correctly, DocuSign recommends that you download the DocuSign Connect for Salesforce configuration xml file as a backup for your settings. This way it is easy to restore your settings. See Downloading and Uploading your DocuSign Connect for Salesforce Settings for more information.

Enabling DocuSign Connect for Salesforce for use with the iPad

This feature lets envelopes with Salesforce items sent through the DocuSign for iPad app send updates back to Salesforce through DocuSign Connect for Salesforce. You must be a DocuSign for Salesforce Administrator to enable this feature.

1. In the DocuSign Console, go to **Preferences** and click **Connect.**

2. Go to the bottom of the page, select **iPad QuickStart** in the QuickStart list and click **Add**.



3. The system asks if you want to append your current configuration. Click **OK** to continue.

4. Click **Save** or **Save & Close** to save the changes.

Downloading and Uploading your DocuSign Connect for Salesforce Settings

DocuSign recommends that you save your DocuSign Connect for Salesforce settings before and after making any changes to your settings by downloading and saving the XML configuration file. The saved version of your DocuSign Connect for Salesforce settings can be uploaded to the system to restore the settings.

Downloading your DocuSign Connect for Salesforce Settings

1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. If not already selected, click the **DocuSign Admin** tab and then click the **Console** tab.

   The DocuSign Console is opened in Salesforce.
3. From the DocuSign Console, click the Account Select list and select **Preferences**.

   The DocuSign Account Preferences page is displayed.
4. In the Navigation Panel on the left side, under the Account Administration section, click **Connect**. The DocuSign Connect Settings page is displayed. Verify the **Salesforce** tab is selected.
5. At the bottom of the DocuSign Connect Settings page, click **Download**.

   The file is saved as an XML file with the default name "DocuSignToSFConfig", but you can change the file name.

Uploading your DocuSign Connect for Salesforce Settings

1. From the **force.com apps** drop-down list, select **DocuSign for Salesforce**.
2. If not already selected, click the **DocuSign Admin** tab and then click the **Console** tab.

   The DocuSign Console is opened in Salesforce.
3. From the DocuSign Console, click the Account Select list and select **Preferences**.

   The DocuSign Account Preferences page is displayed.
4. In the Navigation Panel on the left side, under the Account Administration section, click **Connect**. The DocuSign Connect Settings page is displayed. Verify the **Salesforce** tab is selected.
5. At the bottom of the DocuSign Connect Settings page, click **Browse** and select your DocuSign Connect Settings XML configuration file or type the file location and name in the field.

6. Click **Upload New** to upload the configuration file.

Changing your DocuSign Connect for Salesforce Account Settings

Only use this procedure if you are changing the configuration for DocuSign Connect for Salesforce

The first part of the setup is to notify the DocuSign Connect setup how to access your Salesforce account. This is accomplished by obtaining the Salesforce GUID for Third-party applications, and using it, along with your Salesforce username and password, in the DocuSign Connect Setup.

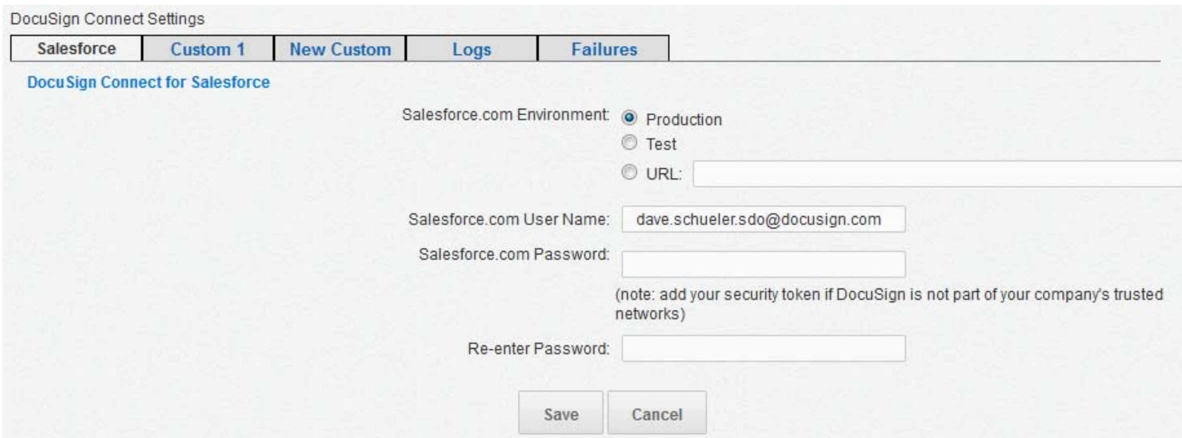
1. If you do not know your Salesforce GUID, you can obtain a security token from Salesforce as follows:
   - From Salesforce.com, click your User menu and select **Setup**.
   - Under Personal Information, find and click the **Reset your security token** link.
   - Click **Reset Security Token**.

     IMPORTANT: This will invalidate any other tokens you may have.
   - The new security token is sent to your email.

2. From the force.com apps drop-down list, select DocuSign for Salesforce.
3. If not already selected, click the **DocuSign Admin** tab and then click the **Console** tab.

   The DocuSign Console is opened in Salesforce.
4. From the DocuSign Console, click you profile image at the top of the console and select **Preferences**.

   The DocuSign Account Preferences page is displayed.
5. In the Navigation Panel on the left side, under the Account Administration section, click **Connect**. The DocuSign Connect Settings page is displayed. Verify the **Salesforce** tab is selected.



6. Select the Salesforce Environment you are configuring DocuSign Connect for Salesforce for.
7. Type your Salesforce User Name.
8. Type your Salesforce password with your security token in the Salesforce.com Password field.

   If your password is *mypassword* and your security token is *12345678*, you must enter *mypassword12345678* in the field.
9. Re-enter your password and security token.
10. Click **Save**. You are returned to the DocuSign Connect Settings page and you can make any other DocuSign Connect for Salesforce setting changes.

For More Information

For more information about additional DocuSign features, go to the DocuSign Support Site.

The Global Standard for eSignature