



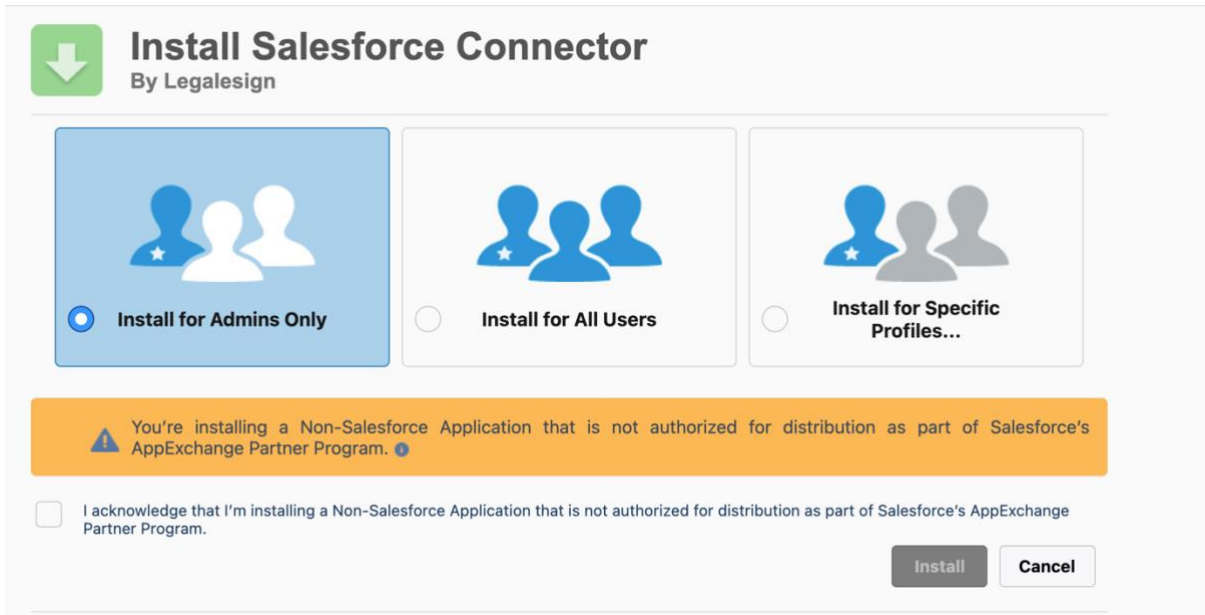
Salesforce and Legalesign Setup User Guide v1.0

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Installing the Legalesign App

1. Enter this link into a browser window:
<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tJ7000000LUuD>
2. Login to the Salesforce environment where the App should be installed.
3. The following screen will be displayed:



Install Salesforce Connector
By Legalesign

☒ Install for Admins Only

☐ Install for All Users

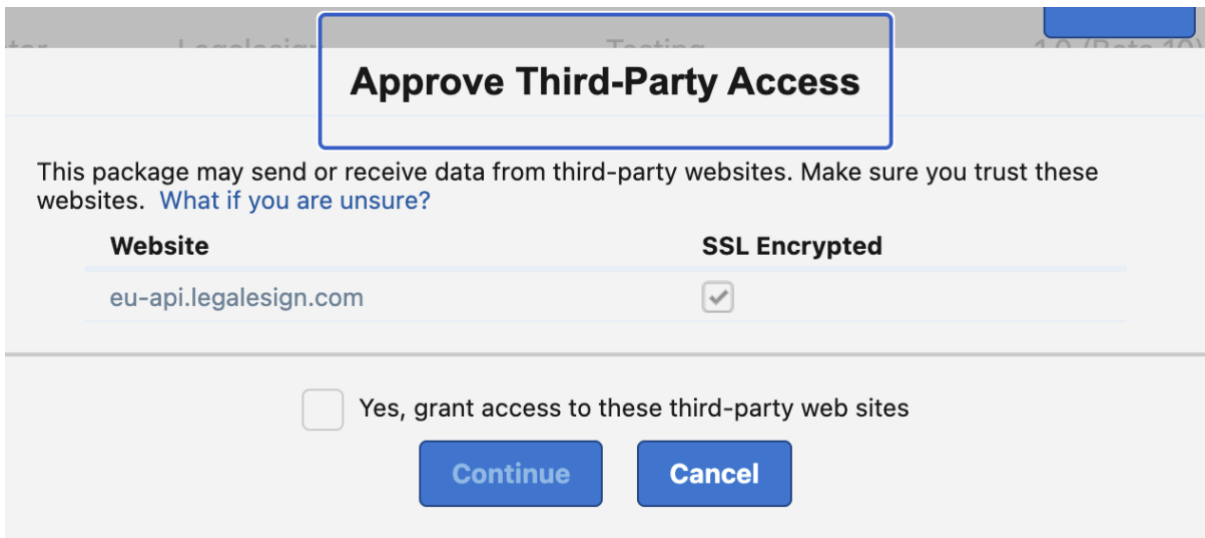
☐ Install for Specific Profiles...

Warning: You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☐ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install **Cancel**

4. Select who should be able to use the Legalesign App and press the Install button.
5. Agree to allow third party access to allow data to flow between Legalesign and Salesforce – tick the checkbox and press Continue.



Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
eu-api.legalesign.com	☒

☐ Yes, grant access to these third-party web sites

Continue **Cancel**

6. Installation of the App should begin. There may be a message displayed that states that an email will be sent once the installation has completed. It is also

possible to check if it has completed in Salesforce via Installed by navigating to:

- a. The right hand side of the screen, click on the Cog and select Setup.
- b. Enter installed packages into the Quick Find search field.
- c. Click on Installed Packages.
- d. View the list of Installed Packages.

Setting Up the Legalesign App

Assigning Permission Sets

Assign permission set(s) to those that require access to the App. There are two levels of access – Legalesign Access and Legalesign Admin Access. Legalesign Admin Access should be given to any users who need to administer the connection between Legalesign and Salesforce, typically your Salesforce administrators. For all other users who need to access Legalesign information in Salesforce, Legalesign Access should be given.

1. Navigate to:
 - a. The right hand side of the screen, click on the Cog and select Setup
 - b. Permission sets can be assigned to one or more users.
 - c. To assign the permission to one user:
 - i. Enter Users into the Quick Find search field.
 - ii. Click on Users then click on the Full Name of the user.
 - iii. Scroll down to 'Permission Set Assignment' and press the 'Edit Assignments' button.
 - iv. Select 'Legalesign Access' for User access or 'Legalesign Admin Access' for Administrator access.
 - v. Press the arrow pointing to the right hand side to add the permission, then press the 'Save' button.
 - d. To assign the permission to more than one user:
 - i. Enter Permission Sets into the Quick Find search field.
 - ii. Click on Permission Sets then click on the name of the permission set that you want to use.
 - iii. Press the 'Manage Assignments' button.
 - iv. Click on the 'Add Assignment' button.
 - v. Use the checkboxes to select all the users who should be assigned this permission set.
 - vi. Press the 'Next' button.
 - vii. Check the users selected are correct then press the 'Assign' button.

Configuration Settings

A one off set up is required to allow Legalesign to connect to Salesforce. To do this:

1. Navigate to the App Launcher (9 dot waffle on the left hand side) and search for or click on Legalesign.
2. Click on the Configuration tab. Initially the screen will look like this:

Legalesign

Search...

Legalesign Legalesign Templates Accounts Contacts Legalesign Documents Legalesign Template Sets Configuration

Configuration Settings

API Key Configuration

Enter the API Key used for authentication.

API Key Status: ✗ Not Configured

API Key:

Validate API Key:

HMAC Secret Configuration

Enter the HMAC Secret used for verification.

HMAC Secret Status: ✗ Not Configured

HMAC Secret:

Salesforce Site Setup

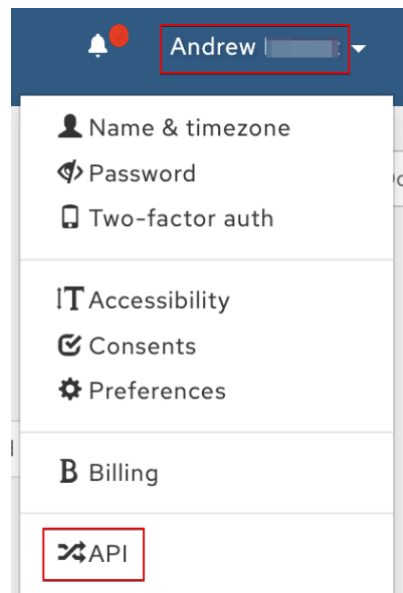
A Salesforce Site is required for the Legalesign endpoint to work.

Site Status: ✗ Site Not Found

Create Site

Guest User Status: ✗ Not Configured

3. First set up the API Key. The unique API Key can be accessed via your Legalesign login using the link <https://access.legalesign.com/>
4. Navigate to your name at the top right hand side of the screen and select API.



5. Select all the text in the grey box, including the ApiKey text and copy it.

API

[Go to API Documentation »](#)

Production mode

Do not share your API access information with anyone.

Username:

Secret key: 

Your API Authorization header should look like this:

```
ApiKey: 
```

Throttle limit: 100

6. Navigate back to the Configuration tab on Salesforce and press the 'Edit' button next to the API Key field.
7. Paste in the copied text and press the 'Save' button.
8. A message should be displayed in a green banner that says 'Success: API Key saved successfully.' If the status does not update, refresh the page to see the updated API Key Status change to Configured.
9. Press the 'Test API Key' button to check that the API connection has worked.
 - a. A message should be displayed that says 'Success: API Key is valid.'
 - b. If the message displayed is 'Error: API Key test failed' then contact support@legalesign.com
10. Next obtain the HMAC Secret by emailing support@legalesign.com.
11. Once they have provided it, press the 'Edit' button, enter the value provided then press the 'Save' button. The following message should be displayed:

✓ **Success:**
HMAC Secret saved successfully.

12. Press the 'Create Site' button under the Salesforce Site Setup section.
13. If you have never set up a site before then follow the steps below, otherwise go to Step 14.
 - a. Navigate to Setup and searching for 'Sites' in the Quick Find box.
 - b. Click on 'Sites'.
 - c. Tick the checkbox 'I have read and accepted the Salesforce Sites Terms of Use' and press the 'Register My Salesforce Site Domain'.

Sites

[Help for this Page](#)

What is a Site?

Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portals, Web forms for capturing leads, and so on.

Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.

Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.



http://.my.salesforce-sites.com



I have read and accepted the Salesforce [Sites Terms of Use](#)

[Register My Salesforce Site Domain](#)

14. Press the 'New' button.

Sites (.my.salesforce-sites.com)

[New](#)

15. Enter the text 'Legalesign Webhook' into the Site Label.

16. Tab into the 'Site Name' field and it should be automatically populated.

Site Edit

New Site
Save Cancel

Site Label

Legalesign Webhook

Site Name

Legalesign_Webhook

Site Description

Site Contact

Andrew

Default Record Owner

Andrew I

Default Web Address

https://cairies2-dev-ed.develop.my.salesforce-sites.com/

Active

☐

Active Site Home Page

InMaintenance

Inactive Site Home Page

InMaintenance

[Preview]

Site Template

SiteTemplate

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

URL Rewriter Class

Enable Feeds

☐

Clickjack Protection Level

Allow framing by the same origin only (Recommended)

Lightning Features for Guest Users

☐

17. In the Active Site Home Page press the magnifying glass and enter 'in' and press 'Go!', select the Name 'InMaintenance'.

Lookup

in

Go!

You can use "*" as a wildcard next to other characters to improve your search results.

< [Clear Search Results](#)

Search Results

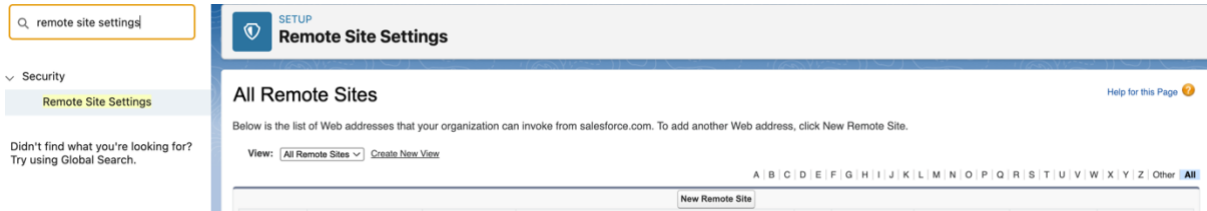
Label	Name	Namespace Prefix	Api Version	Description	Created By Alias	Created Date	Last Modified By Alias	Last Modified Date
InMaintenance	InMaintenance		60.0	Default Lightning Platform In Maintenance page		12/03/2024, 18:09		12/03/2024, 18:09

18. Tick the 'Active' checkbox and press the 'Save' button.

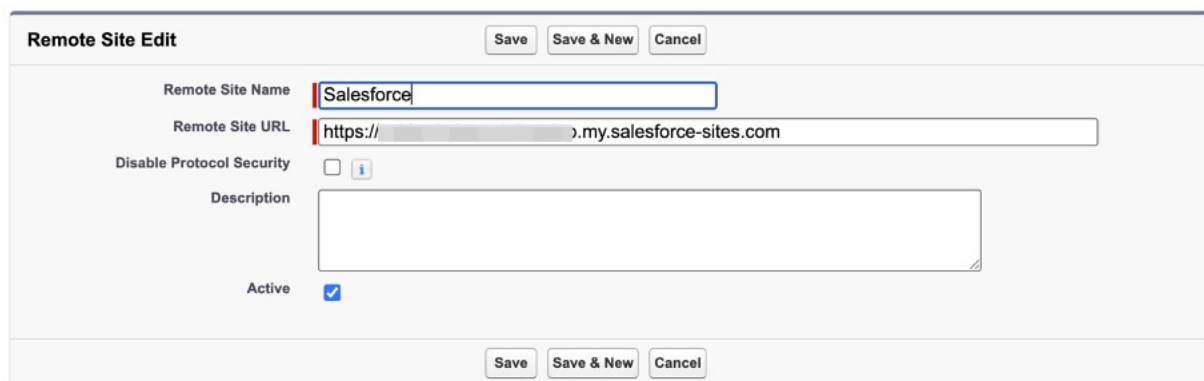
19. Copy the Site URL e.g. <https://MyOrgName.my.salesforce-sites.com>.

Sites (my.salesforce-sites.com)							New
Action	Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By	
Edit Deactivate	Legalesign Webhook	https://my.salesforce-s...		☒	Force.com	Andrew	

20. Next enter 'Remote Site Settings' into the Quick Find box and click on 'Remote Site Settings'.



21. Press the 'New Remote Site' button.
22. Enter the Remote Site Name, e.g. Salesforce
23. Paste the site URL.
24. Press the 'Save' button.



25. Navigate to the 'Configuration' tab in the Legalesign App.
26. Press the 'Config Guest User' button and the following message should be displayed:

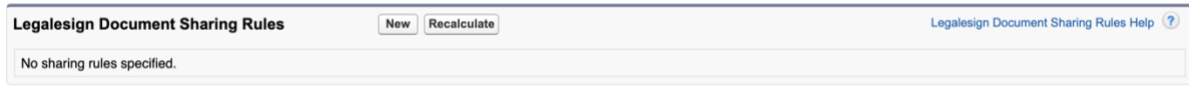
✓ **Success:**
Guest User permissions configured successfully.

27. Press the 'Test Endpoint' button and the following message should be displayed:

✓ **Success:**
Endpoint test successful.

Create Salesforce Site Sharing Rule

1. Navigate to Setup and searching for 'Sharing Settings' in the Quick Find box.
2. Click on 'Sharing Settings'.
3. Scroll down to the 'Legalesign Document Sharing Rules' section and press the 'New' button.



4. Enter 'Site Guest User Access' into the Label field.
5. Press the tab button and the Rule Name field will be automatically populated.
6. Select the Rule Type 'Guest user access, based on criteria'.
7. Select the Field 'uuid', the Operator 'not equal to' and leave the value blank.
8. Press the 'Save' button.



Step 1: Rule Name Required Information

Label: Site Guest User Access

Rule Name: Site_Guest_User_Acces

Description:

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

This sharing rule grants access to guest users without login credentials. By modifying the default settings in accordance with these criteria, you're allowing immediate and unlimited access to all records matching these criteria to anyone accessing the site, even without logging in. To secure your site and its data from guest users, consider all the use cases and implications, and implement security controls that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any exposure of your data to guest users related to this change from default settings.

Criteria	Field	Operator	Value	
	uuid	not equal to		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

[Add Filter Logic...](#)

Additional Options: ☐ Include records owned by high-volume users

Step 4: Select the users to share with

Share with: Legalesign Webhook Site Guest User

Step 5: Select the level of access for the users

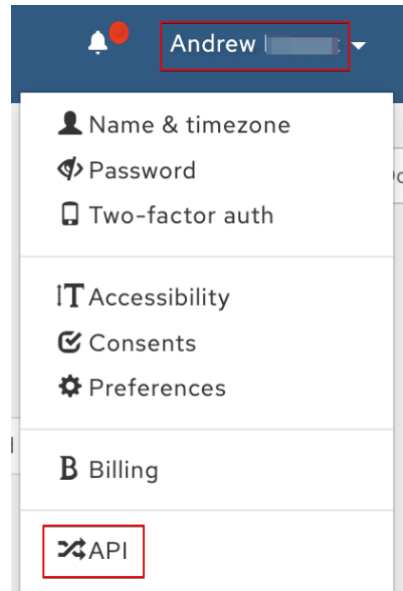
Access Level: Read Only

[Save](#) [Cancel](#)

9. Press 'OK' to continue on the pop up window.

Setup Legalesign Webhook

1. Login to Legalesign using the link <https://access.legalesign.com/>
2. Navigate to your name at the top right hand side of the screen and select API.



3. Scroll to the Webhooks section.
4. Copy the Remote Site name from Salesforce. This can be found by
 - a. Navigate to Setup and searching for 'Remote Site Settings' in the Quick Find box.
 - b. Click on 'Remote Site Settings'.
 - c. Copy the Remote Site URL that was created above.
5. Paste it into the 'Webhook URL' field and append this additional text: /services/apexrest/legalesign/realTimeEvent. Therefore the Webhook URL will look something like the following:
<https://MyOrgName.my.salesforce-sites.com/services/apexrest/legalesign/realTimeEvent>
6. Press the 'Add new webhook' button.

Webhooks

URL	Webhook type	Group	Filter
Type of webhook	All realtime events (new/recommender) ▼		
Group	All groups ▼		
Event filter	All events ▼		
Webhook URL	Your webhook URL		

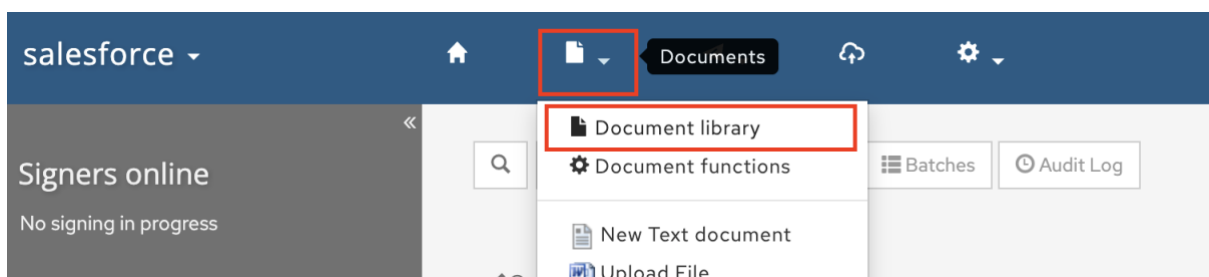
[Add new webhook](#)

Setting up a Template

Setting up a Template in Legalesign

On the 'Legalesign Documents' tab, Salesforce will display all the templates that are set up in the Document Library in Legalesign. These documents can be found in Legalesign by:

1. Clicking on the document icon on the main menu bar and selecting Document Library.



2. This will display all documents created that are to be used for signing.

Sent

PDF/DOC Documents +

Tags: ...

	Name	Tag	Created ▼		
	...	...	Feb. 25, 2022, 4 p.m.	Send	Archive
	...	...	Feb. 22, 2022, 8:46 a.m.	Send	Archive
	...	...	Feb. 22, 2022, 8:45 a.m.	Send	Archive
	...	...	Feb. 21, 2022, 8:20 a.m.	Invalid	Archive

- For more information on how to set up a Legalesign document – please use see our [help documentation](#).
- Click on a document name under the Name column.
- To set up the fields to be displayed automatically on the document or collect information from the signer to be stored in Salesforce, use the Sender and the Signer fields respectively.

Signer fields ?

Table view

Signer 1 ▼

Signature

Initial

Signing date (automatic)

Text

Email

Tick box

Dropdown

Sender fields ?

Text ✓

Date

Tick box

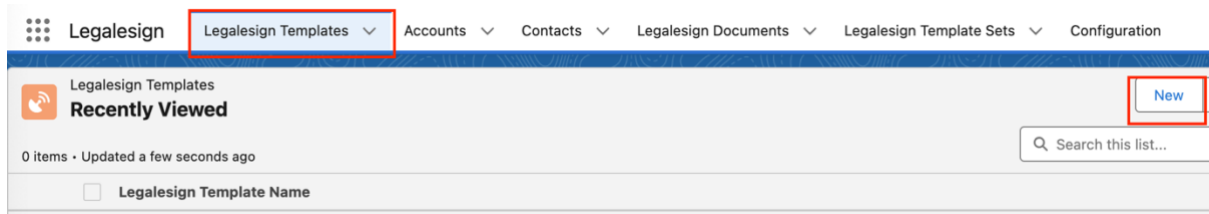
Dropdown

Auto-sign at sending ?

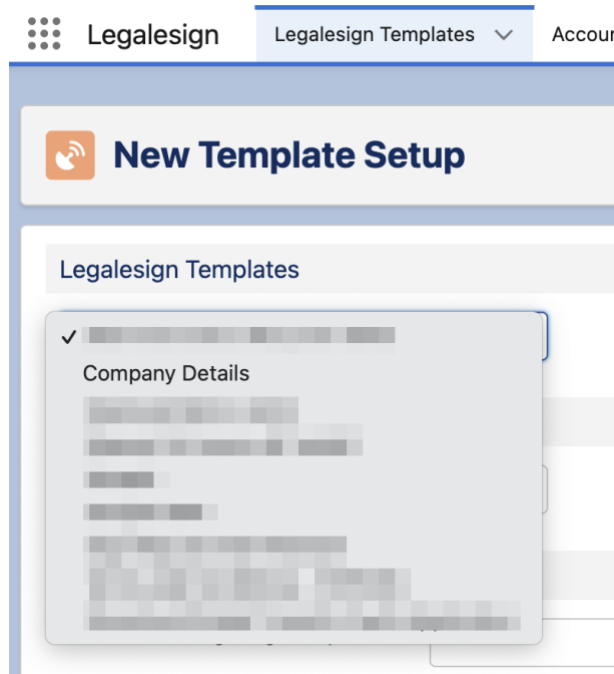
- Select a field and drag it on to the page to the appropriate position.
- Enter the required values and press the 'Save' button.

Mapping the Legalesign Template to Salesforce

1. Click on the 'Legalesign Templates' tab within the Legalesign app.
2. Press the 'New' button on the right hand side.



3. Select the name of the file from the list of Legalesign Templates. The templates displayed are those that are in the document library in Legalesign.



4. Select the name of the Salesforce object where the information is retained/to be stored. This could be a standard object or a custom object. The only standard objects available are: Account, Contract, Opportunity, Order and Contact. All custom objects should be listed.
5. Leave the Legalesign Template Set field blank.
6. Press the 'Setup Mapping' button.

- | | |
|----------------|-------------------|
| Company Name | name |
| Address | billingstreet |
| Company Number | company_number__c |
| Sort Code | sort_code__c |
| Account Number | accountnumber |
| VAT Number | vat_number__c |

Cancel

- 16

Generating the Template to be Signed

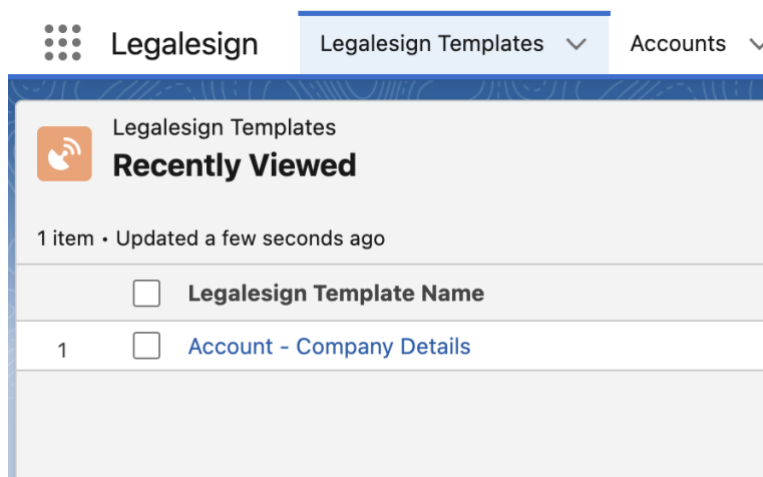
Setup Generate Button

Before the template can be generated, a button must be created to allow the user to send the document for signing. To do this:

1. Navigate to the Cog and select Setup.
2. Click on the Object Manager tab.
3. Select or search for the object for which the template is based on, e.g. Account.
4. Click on the Label for the object.
5. Click on 'Buttons, Links, and Actions'.
6. Select the 'New Button or Link' button at the right hand side.
7. Enter the name of the button into the Label box, e.g. Generate Document.
8. Press the tab button and the Name field will be automatically populated.
9. Enter a description regarding what the button is used for. This is not mandatory.
10. Select the Display Type 'Detail Page Button'.
11. Select the Behaviour 'Display in existing window with sidebar'.
12. In the large text box paste the following, but update the object name and template id in blue:
`/apex/legalesign__TemplateSender?recordid={!Your_Object_Name.Id}&templateid=Salesforce_Legalesign_Template_Id`
 For example, **Your_Object_Name** should be replaced with the name of the object for which the template is based on, e.g. Account, therefore would be displayed as `/apex/legalesign__TemplateSender?recordid={!Account.Id}`

The **Salesforce_Legalesign_Template_Id** can be found on the Legalesign Template in Salesforce, by navigating to:

- a. The Legalesign Template tab
- b. Click on the Legalesign Template Name



- c. Click on the value in the Salesforce Template ID field.

Legalesign Template
Account - Company Details

Details

Legalesign Template Name	Account - Company Details	Owner	Andrew
Template ID		Legalesign Template Set	set
Group	/api/v1/group/salesforce/	Salesforce Template ID	a048d00000DeVzsAAF
Object	Account		
Signers	1		
Field Mappings	{{"label":"Company Name","field":"name"}}		
Created By	Andrew 30/11/2023, 02:59	Last Modified By	Andrew 24/02/2025, 11:22

- d. Copy this value and append it to the URL, therefore it would look something like
/apex/legalesign__TemplateSender?recordid={!Account.Id}&templateid=a07TU00000RujfdWEA
- e. Press the 'Save' button.

Page Layout Changes

1. To add this new button to the page so the user can see it, navigate to 'Page Layouts'.

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Account Custom Button or Link

Generate Document

Custom Button or Link Detail

Label	Generate Document
Name	Generate_Document
Behavior	Display in existing window wi
Button or Link URL	/apex/templatesender?recore
Height (in pixels)	600

2. Select the page layout where the button should be displayed by clicking on the Page Layout Name.
3. Select Mobile & Lightning Actions, click on the name of the button created, then drag it into the section called 'Salesforce Mobile and Lightning Experience Actions'

Account Layout ▾

Custom Console Components Mini Page Layout Mini Console View Video Tutorial Help for this Page

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Fields

Buttons

Custom Links

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Add Contacts To C... Change Owner Delete Email (mobile only) Generate Invoices Link New Account New Group

Add to an Actiona... Change Record Type Edit Evaluate Candidate Get Contacts Link a Stack Channel New Case New Lead

Add to Call List Check for New Data Edit Labels File Get Survey Invita... Log a Call New Contact New Note

Call Create Summary Email Generate Document Include Offline Mobile Smart Actions New Event New Opportunity

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll

Question Email

Salesforce Mobile and Lightning Experience

Actions

Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll

Question Email Change Owner Include Offline Check for New Data Submit for Approval Get Contacts Edit Delete

Change Record Type Sharing View Account Hierarchy Call Send Text Email (mobile only) View Website

4. Press the 'Quick Save' button.
5. Next, click on 'Related Lists', select 'Legalesign Documents' and drag it into the Related Lists section, then press the 'Quick Save' button. This will appear by default on the following standard Salesforce objects – Account, Contract, Opportunity, Order and Contact.

6. For a custom object, a lookup must be created first on the Legalesign Document object. To do this, follow the steps in a. below otherwise go to step 7.
 - a. If using a custom object, create a look up field by:
 - i. Navigating to the Object Manager and searching for 'Legalesign Document' in the Quick Find.
 - ii. Click on the Label 'Legalesign Document'
 - iii. Select 'Fields & Relationships'.
 - iv. Press the 'New' button.
 - v. Select the 'Lookup Relationship' radio button and press the 'Next' button.
 - vi. Select the name of the custom object to link to from the 'Related To' menu and press 'Next'.
 - vii. Click in the Field Name field to automatically populate the field, then press the 'Next' button. Do not change the automatically generated Field Name, it must be populated with the custom object name.
 - viii. Select which Profile(s) this related list should be visible to by selecting the required checkboxes, then press the 'Next' button.
 - ix. Press the 'Save' button.
 - x. Follow step 5 above to add the Related List to the custom object.

SETUP > OBJECT MANAGER
Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

Activity History	Campaigns	Contact Point Add...	Contacts	Data Integration ...	Invoices	Opportunities	Related Content
Approval History	Cases	Contact Point Emails	Content Deliveries	Entitlements	Legalesign Documents	Orders	Resource Preference
Assets	Communication Sub...	Contact Point Phones	Contracts	Files	Notes & Attachments	Partners	Service Appointment
Associated Locations	Community Members	Contact Roles	Credit Memos	Groups	Open Activities	Provided Assets	Service Contracts

Mobile Cards (Salesforce mobile only)

Twitter

Related Lists

Contacts New Merge Contacts Add to Campaign

Contact Name	Title	Email	Phone
Sarah Sample	Sample Text	sarah.sample@company.com	1-415-555-1212

Opportunities New

Opportunity Name	Stage	Amount	Close Date
Sample Text	Sample Text	£123.45	14/04/2025

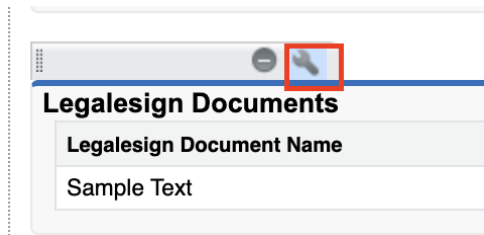
Cases New Change Owner

Case	Contact Name	Subject	Priority	Date Opened	Status	Owner
GEN-2004-001234	Sarah Sample	Sample Text	Sample Text	14/04/2025, 19:30	Sample Text	Sarah Sample

Open Activities New Task New Event

Subject	Name	Related To	Task	Due Date	Status	Priority	Assigned To
Sample Text	Sample Text	Sample Text	✓	14/04/2025, 19:30	Sample Text	Sample Text	Sarah Sample

7. Press the Spanner icon next to the Legalesign Documents' Related List.



8. Select one field at a time and press the Add button to choose which fields should be visible on the Related List on the object, e.g. Account.
9. Use the Up and Down arrow buttons to change the order that the fields appear.
10. Press the plus sign next on the Buttons banner

Related List Properties - Legalesign Documents

[Help](#) ?

Columns

Select fields to display on the related list. You can also reorder the selected fields.

Available Fields		Selected Fields	
Order	Add  Remove 	Legalesign Document Name	Up  Down 
Owner Alias		Status	
Owner First Name	Error Message		
Owner Last Name		Created Date	
Record ID			
batchId			
locationId			

Sort By: Created Date

☒ Ascending
☐ Descending

Buttons

11. Untick both the 'New' and 'Change Owner' checkboxes, then press the OK button.

Related List Properties - Legalesign Documents

[Help](#)

Columns +

Buttons -

Standard Buttons:
Select standard buttons to display on the related list.

☐ New

☒ Change Owner

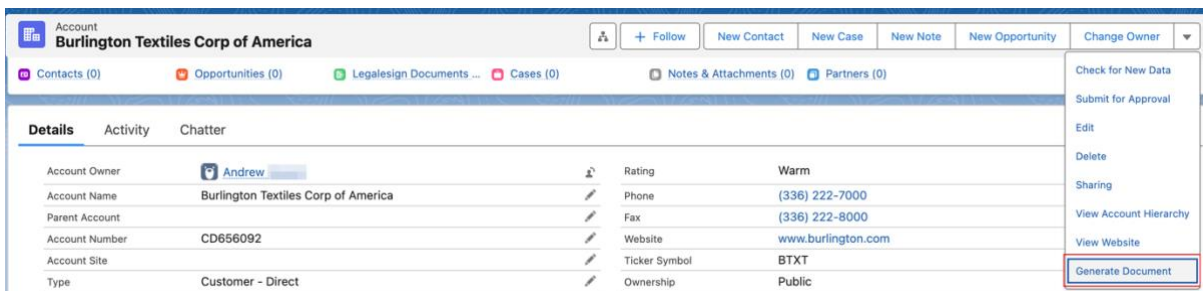
OK Cancel Revert to Defaults

12. Press the 'Save' button on the page layout.
13. Select 'Yes' when asked whether the changes should overwrite users' personal related list customizations.
14. Repeat steps 2-12 if the changes are required on more than one page layout.

Generate Document

To generate the document to be sent, click on the tab of the object where the button was added, e.g. Account.

1. The button should appear in the list of buttons on the right hand side. If the button is not immediately visible, then press the down arrow button.



The screenshot shows the 'Burlington Textiles Corp of America' account page. The 'Details' tab is active, displaying account information. On the right side, a dropdown menu is open, showing various actions. The 'Generate Document' button is highlighted with a red box.

Field	Value
Account Owner	Andrew
Account Name	Burlington Textiles Corp of America
Parent Account	
Account Number	CD656092
Account Site	
Type	Customer - Direct
Rating	Warm
Phone	(336) 222-7000
Fax	(336) 222-8000
Website	www.burlington.com
Ticker Symbol	BTXT
Ownership	Public

2. Click on the button created, e.g. 'Generate Document'.
3. Search for the Contact who the document should be sent to by pressing the magnifying glass icon.
4. Enter the contact's name in the Search field.
5. Click on the Name to select the contact.

New Document

Field Information

Company Name

Burlington Textiles Corp of America

Address

525 S. Lexington Ave

Company Number

Sort Code

Account Number

CD656092

VAT Number

Signer Information (Template requires 1 signer)

Contact

Jo Bloggs

Search - Salesforce - Developer Edition

cairies2-dev-ed--legalesign.develop.vf.force.com/_ui/common/data/LookupPage?ikfm=j_id...

Lookup

Jo Bloggs

Go! New

You can use *** as a wildcard next to other characters to improve your search results.

< Clear Search Results

Search Results

Name	Account Name	Account Site
Jo Bloggs	Burlington Textiles Corp of America	

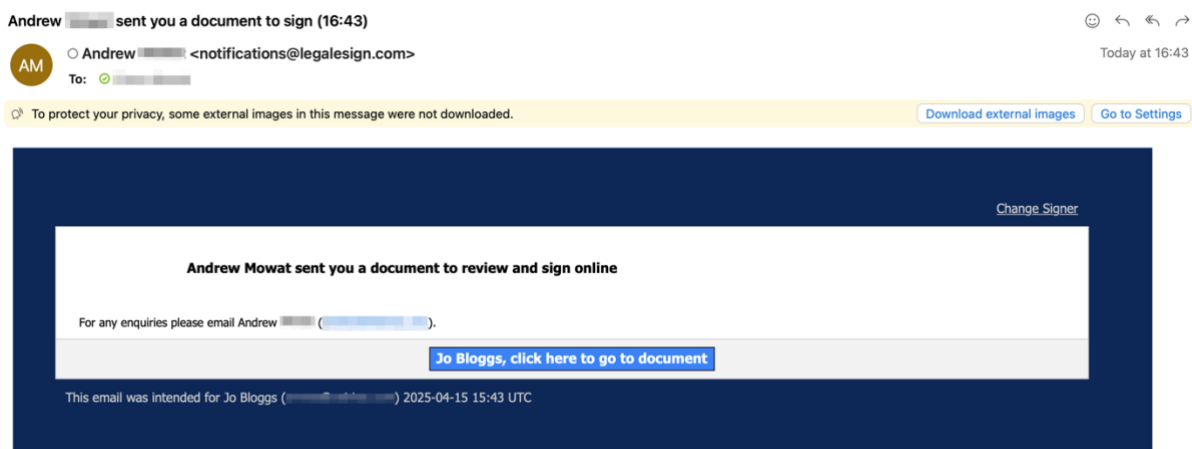
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6. Press the 'Send for Signature' button.
7. On the object, click on the Legalesign Documents related list to view the document and its status

Legalesign Documents (1)				
1 Item • Sorted by Created Date • Updated a few seconds ago				
☐	Legalesign Document Name	Status	Error Mes...	Created Date ↑
1	Company Details	Awaiting Signature		

[View All](#)

8. An email should also have been received:



9. The user should click on the blue button to open the document.
10. The user must select the two checkboxes before then can proceed.

Company Details sent by Salesforce

This document has been sent to you by: Andrew ()

☐ I confirm that I am authorised to accept the terms of this document.
☐ I understand that accepting the terms of this document creates a legally binding obligation.

[Get started](#) [Reject document](#)

Zoom

Company Number (p.1)*	To do
Sort Code (p.1)*	To do
Account Number (p.1)*	To do
VAT Number (p.1)*	To do
Sign here (p.1)*	To do

 **Legalesign**

Company Name: Burlington Textiles Corp of America

Address: 525 S. Lexington Ave

Company Number:

Bank Sort Code:

Bank Account Number:

VAT Number:

11. The user should press the green 'Get started' button.
12. Some information is already prepopulated from Salesforce. Other information must be provided by the user.

Company Name: Burlington Textiles Corp of America

Address: 525 S. Lexington Ave

Company Number:

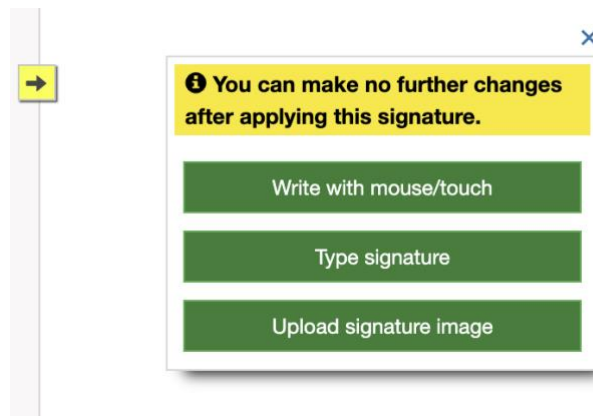
Bank Sort Code:

Bank Account Number:

VAT Number:



13. The user is offered different options for signing.



14. User presses the 'Submit signature' button.

15. The user is presented with a message to confirm signature, and an email is sent also.

Document signed



Andrew <notifications@legalesign.com>

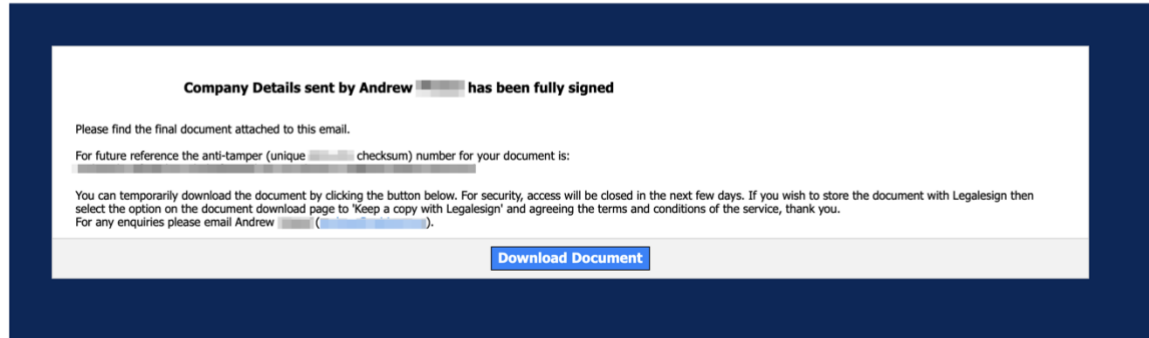
To: [redacted]

Company Details.pdf
109.3 KB

[Download](#) • [Preview](#)

To protect your privacy, some external images in this message were not downloaded.

[Download external images](#) [Go to Settings](#)



Viewing Status of Sent Documents

The status of the sent document can be viewed via the object where the button was created, in this case on the specific Account, or via the 'Legalesign Documents' tab.

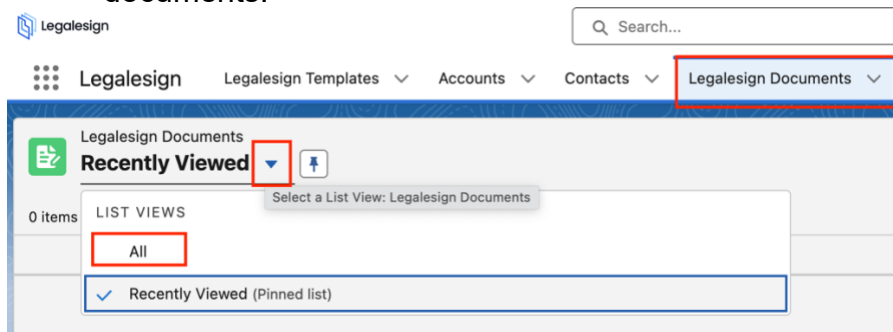
Related List view of Legalesign Documents

1. Click on the name of the tab where the button was created. In this case, click on the 'Accounts' tab.
2. Scroll down to the 'Legalesign Documents' related list.
3. The 'Status' field has been updated from 'Awaiting Signature' to 'Signed'.

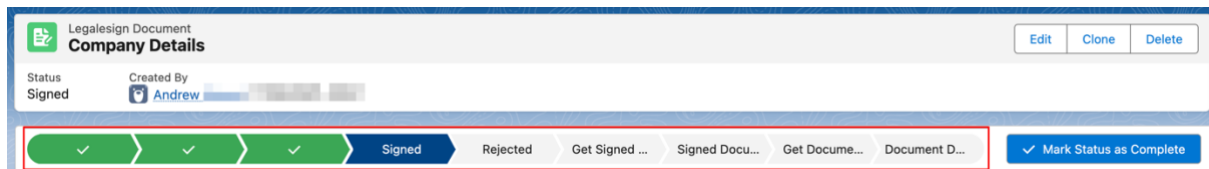
Legalesign Documents (1)				
1 item • Sorted by Created Date • Updated a few seconds ago				
☐	Legalesign Document Name	Status	Error Mes...	Created Date ↑
1	Company Details	Signed		

'Legalesign Documents' tab

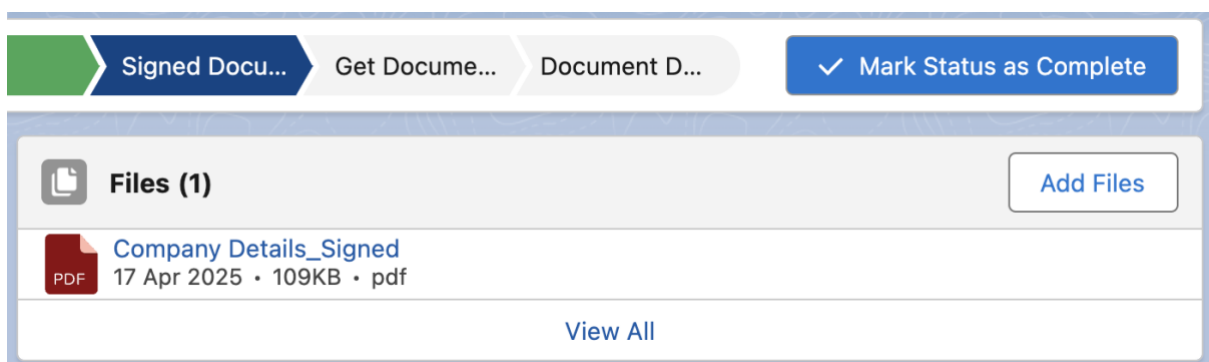
1. Click on the 'Legalesign Documents' tab.
2. By default, the 'Recently Viewed' list is displayed.
3. Click on the down arrow next to Recently Viewed and select 'All' to view more documents.



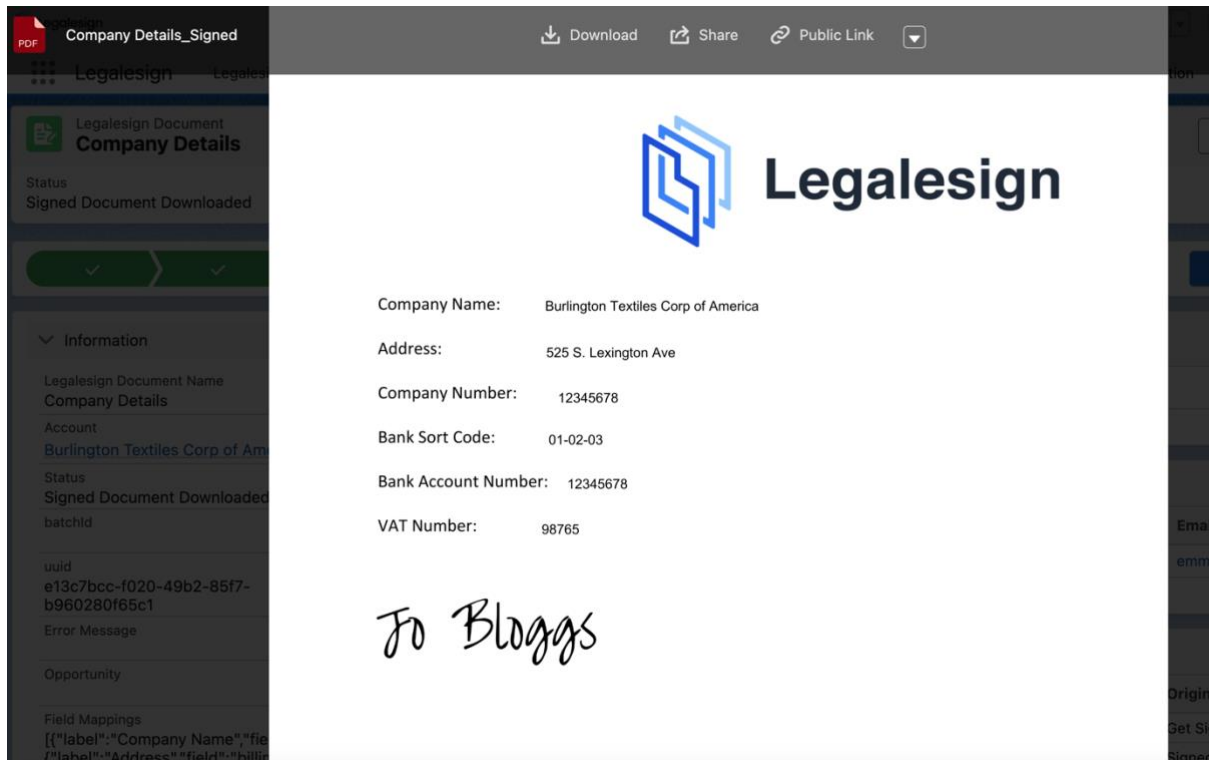
4. Click on the Legalsign Document Name.
5. The status of the document is shown in the path across the top of the screen.



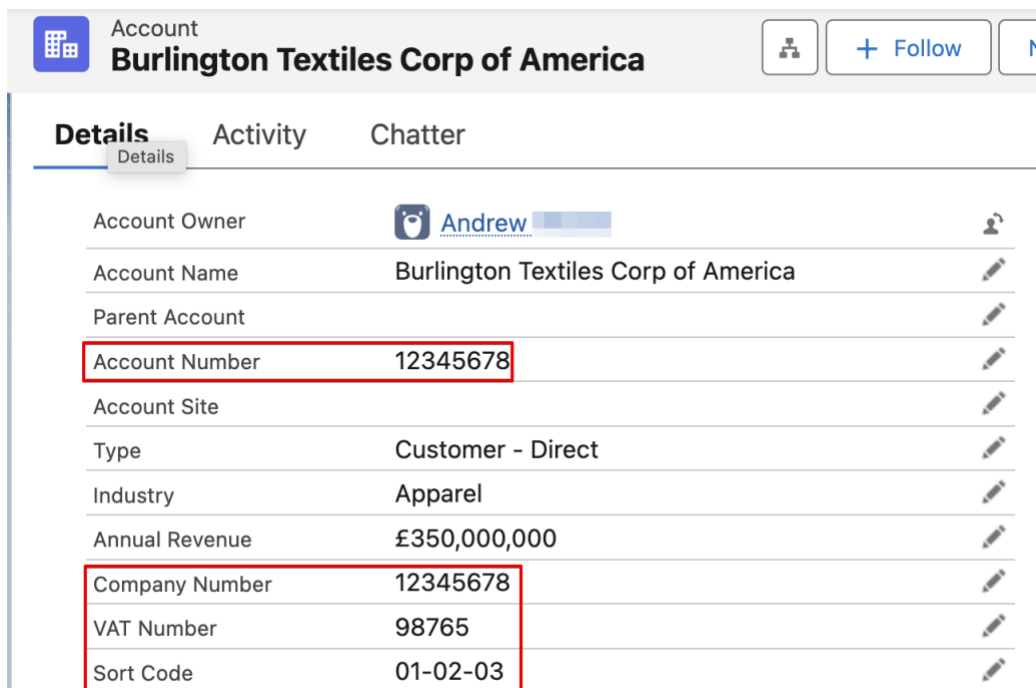
6. To obtain a copy of the document that has been signed, update the Status field to 'Get Signed Document'. This can be done by clicking on the stage on the path 'Get Signed Document' and pressing the blue 'Mark Current Status' button on the path. Or press the pencil icon next to the 'Status' field, or the 'Edit' button at the top right hand of the page, and select the 'Get Signed Document' option from the Status field and press the 'Save' button.
7. Refresh the page and a copy of document will now appear in the Files section. The status of the document also automatically updates to 'Signed Document Downloaded'.



8. Click on the name of the file to view the document.

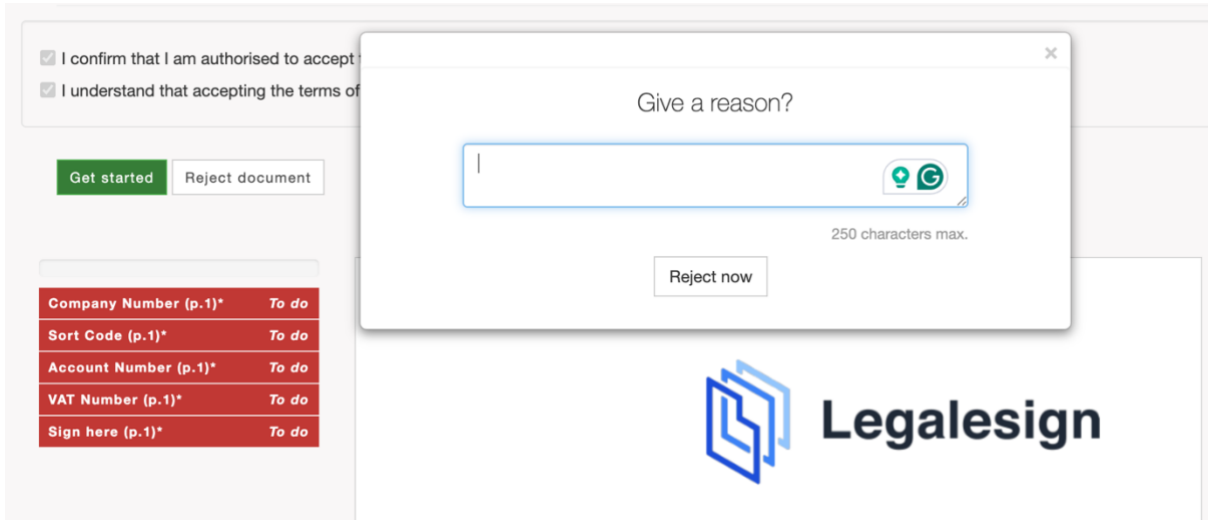


9. Update the status of the document to 'Get Document Data' following the steps described in step 6. This will automatically copy the data from the mapped fields on the document into Salesforce.
10. Navigate to the object where the document button was created. In this case on the Account object. This is now populated with the values captured in the document.

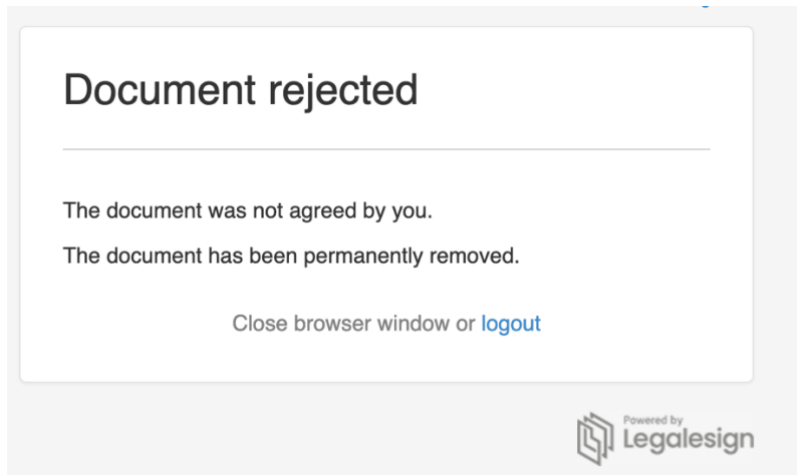


Rejected Document

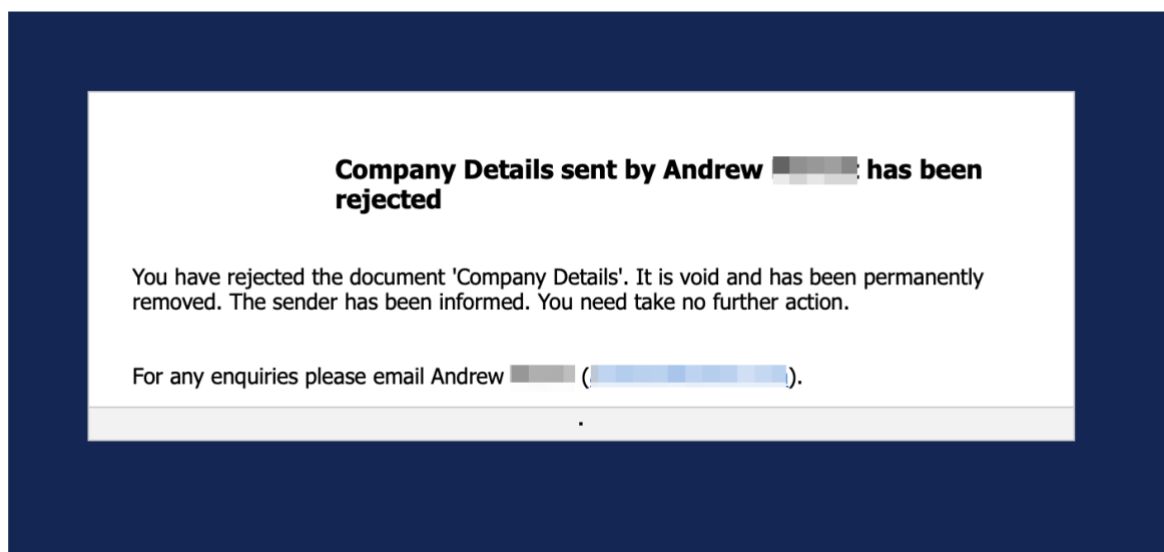
1. The customer can reject the document by pressing the 'Reject document' button, providing a reason and pressing the 'Reject now' button.



2. A message will be displayed to confirm the document has been rejected.



3. An email will also be sent to confirm the rejection.



The status of the sent document can be viewed via the object where the button was created, in this case on the specific Account, or via the 'Legalesign Documents' tab as described in section [Viewing Status of Sent Documents](#).

Legalesign Documents (2)				
2 items • Sorted by Created Date • Updated a few seconds ago				
☐	Legalesign Document Name	Status	Error Mes...	Created Date ↑
1	☐ Company Details	Document Data Updated		
2	☐ Company Details	Rejected		

[View All](#)

Help Documentation

For more Legalesign help documentation, please go to our Help Portal:
<https://legalesign.com/articles/>

For specific documentation help for setting up templates, use the following links

- Upload: <https://legalesign.com/articles/pdf-documents/how-to-upload-a-template/>
- Template Preparation: <https://legalesign.com/articles/getting-started-with-console/fields/>
- Advanced Template Editing Tips: <https://legalesign.com/articles/getting-started-with-console/advanced-template-editing-tips/>
- What is a Sender Field: <https://legalesign.com/articles/getting-started-with-console/sender-fields/>