Legalesign
eSignature for business

Salesforce and Legalesign Setup User Guide v1.0

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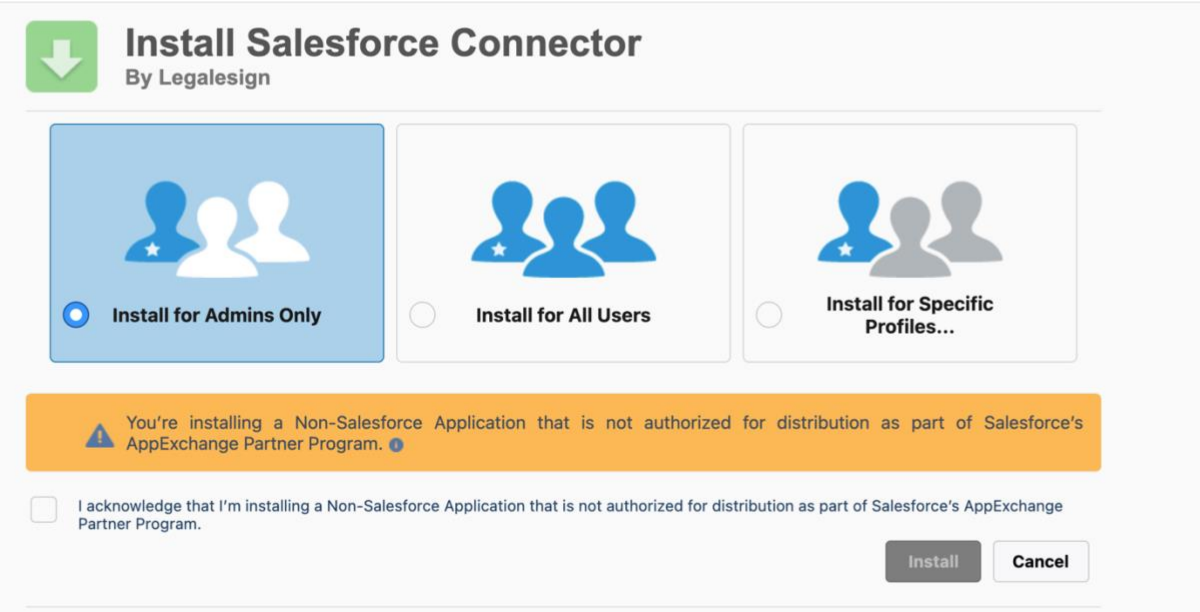
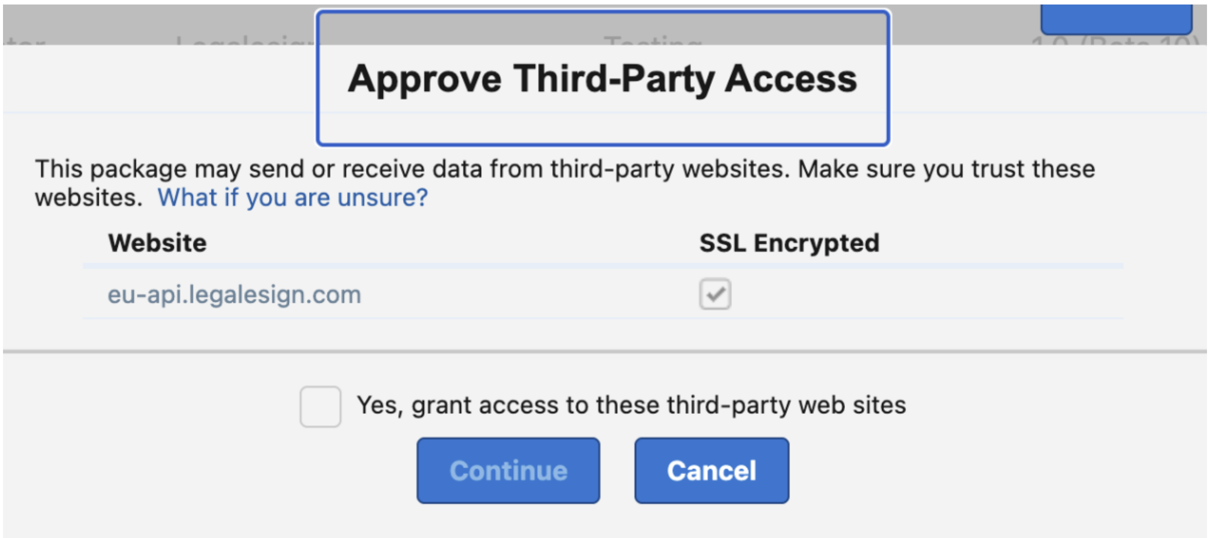
Installing the Legalesign App

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:



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.



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

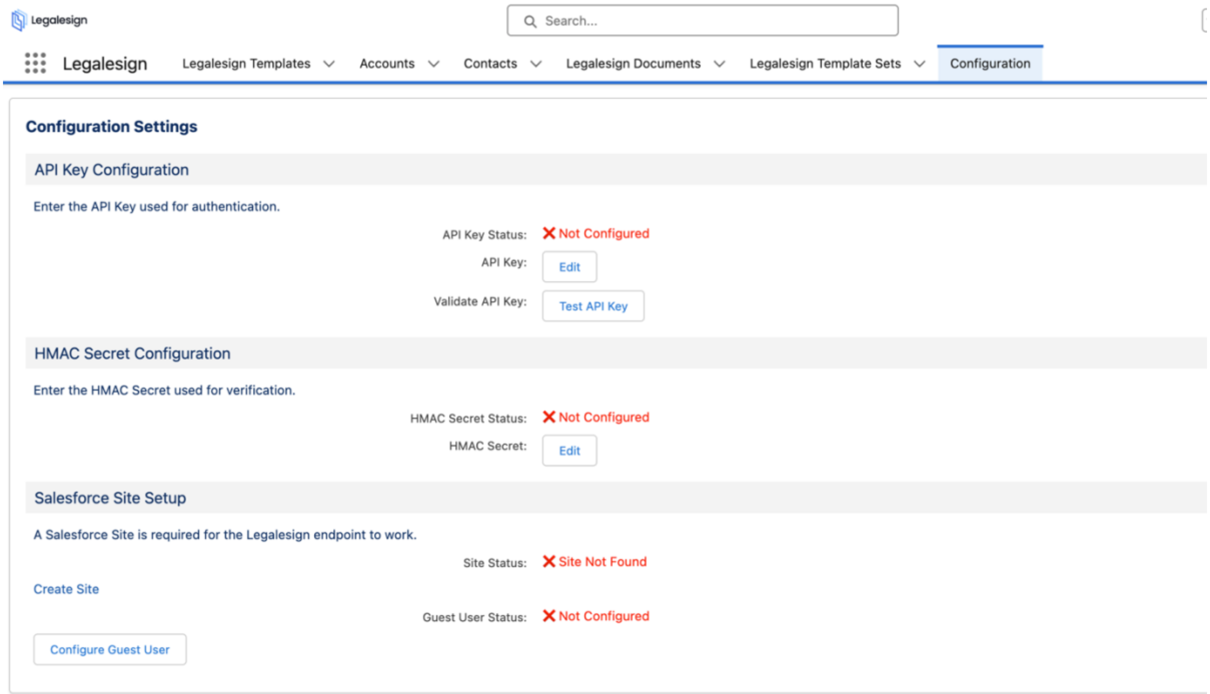
Assign permission set(s) to those that require access to the App. There are two levels of access – Legalesign Access and Legalesign Admin Access. Legalesign Admin Access should be given to any users who need to administer the connection between Legalesign and Salesforce, typically your Salesforce administrators.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

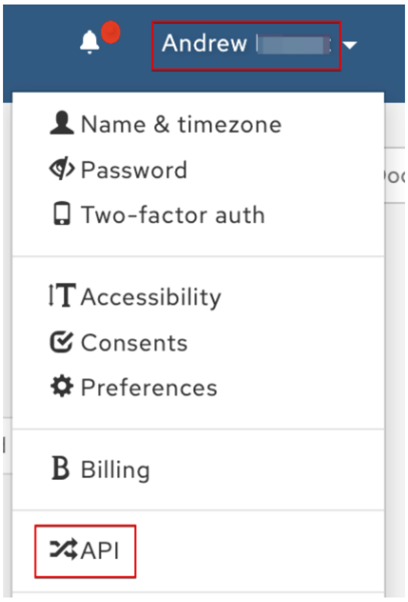
Configuration Settings

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

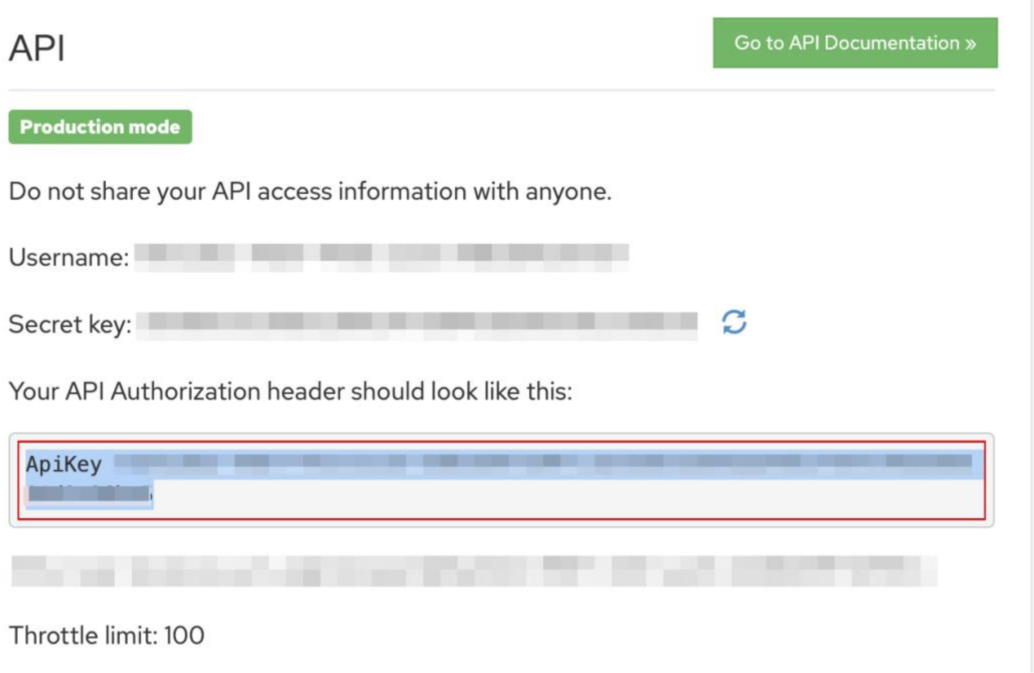
1. Navigate to the App Launcher (9 dot waffle on the left hand side) and search for or click on Legalesign.
2. Click on the Configuration tab. Initially the screen will look like this:



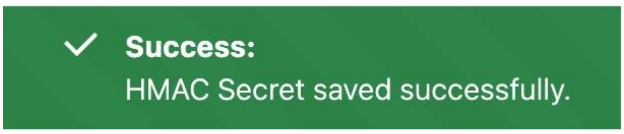
3. First set up the API Key. The unique API Key can be accessed via your Legalesign login using the link https://access.legalesign.com/
4. Navigate to your name at the top right hand side of the screen and select API.



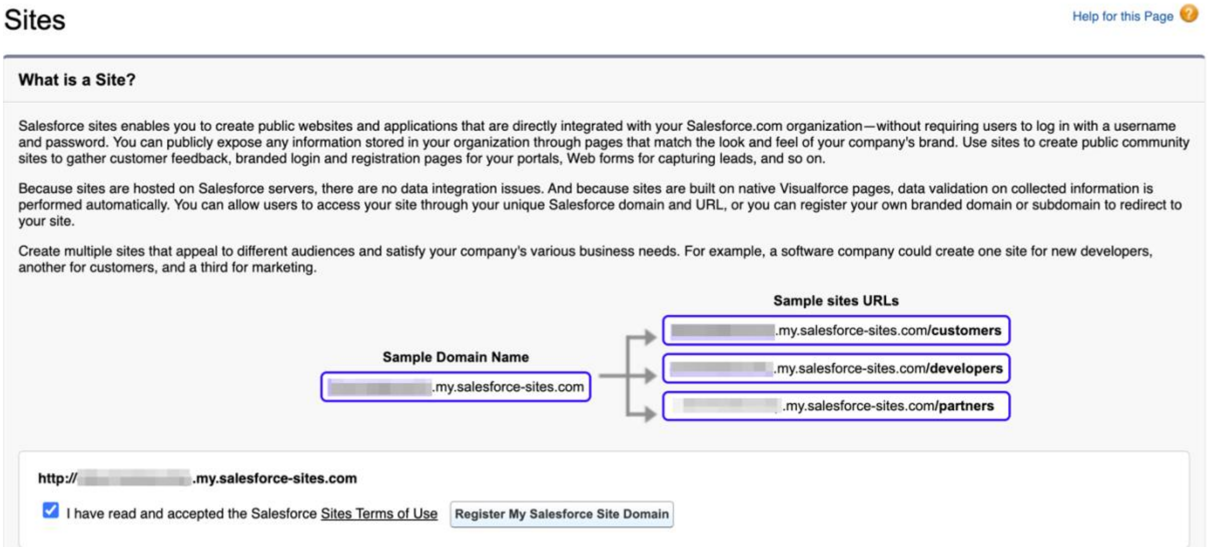
5. Select <u>all</u> the text in the grey box, including the ApiKey text and copy it.



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:

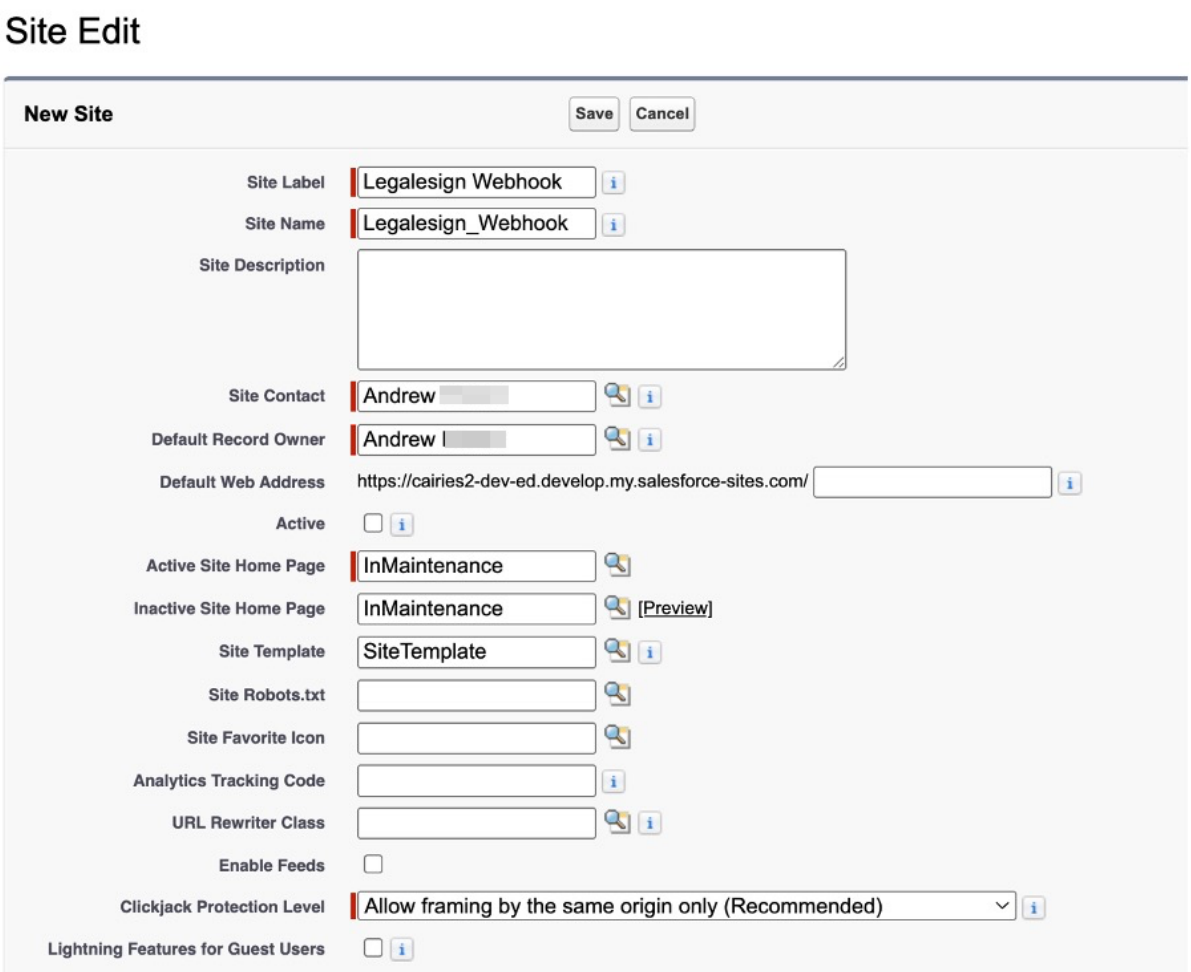


12. Press the 'Create Site' button under the Salesforce Site Setup section.
13. If you have never set up a site before then follow the steps below, otherwise go to Step 14.
    a. Navigate to Setup and searching for 'Sites' in the Quick Find box.
    b. Click on 'Sites'.
    c. Tick the checkbox 'I have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

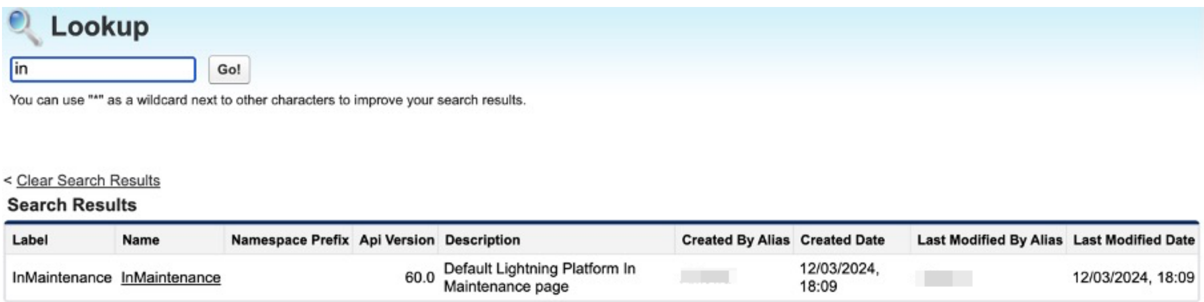


14. Press the ‘New’ button.

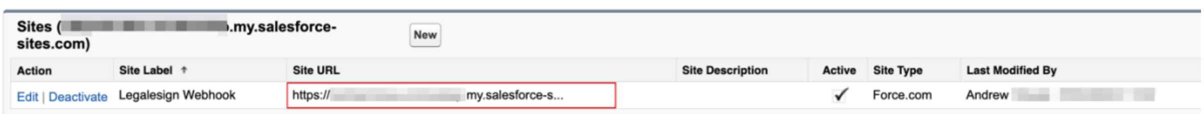
15. Enter the text ‘Legalesign Webhook’ into the Site Label.
16. Tab into the ‘Site Name’ field and it should be automatically populated.



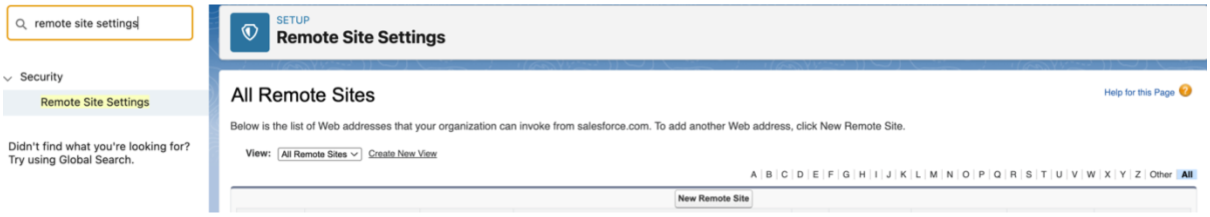
17. In the Active Site Home Page press the magnifying glass and enter ‘in’ and press ‘Go!’, select the Name ‘InMaintenance’.



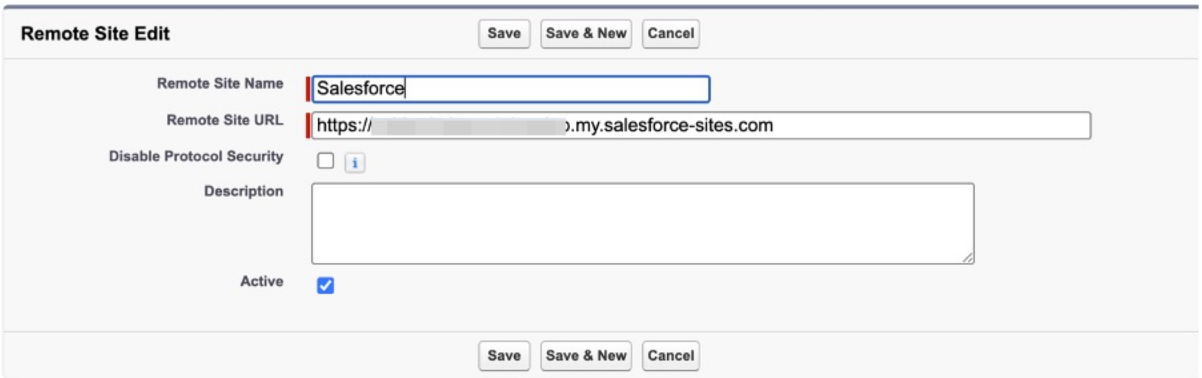
18. Tick the ‘Active’ checkbox and press the ‘Save’ button.
19. Copy the Site URL e.g. https://MyOrgName.my.salesforce-sites.com.



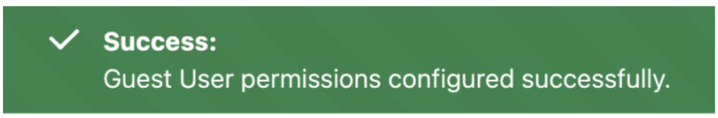
20. Next enter ‘Remote Site Settings’ into the Quick Find box and click on ‘Remote Site Settings’.



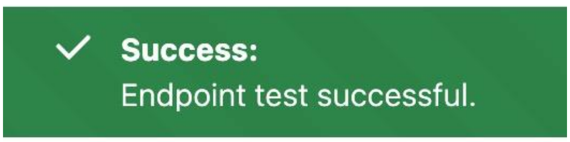
21. Press the ‘New Remote Site’ button.
22. Enter the Remote Site Name, e.g. Salesforce
23. Paste the site URL.
24. Press the ‘Save’ button.



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

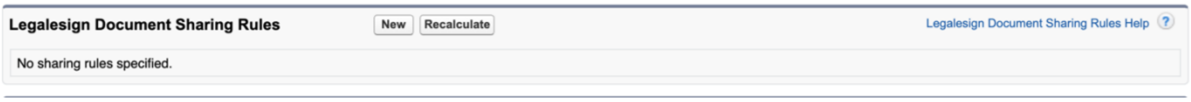


27. Press the ‘Test Endpoint’ button and the following message should be displayed:

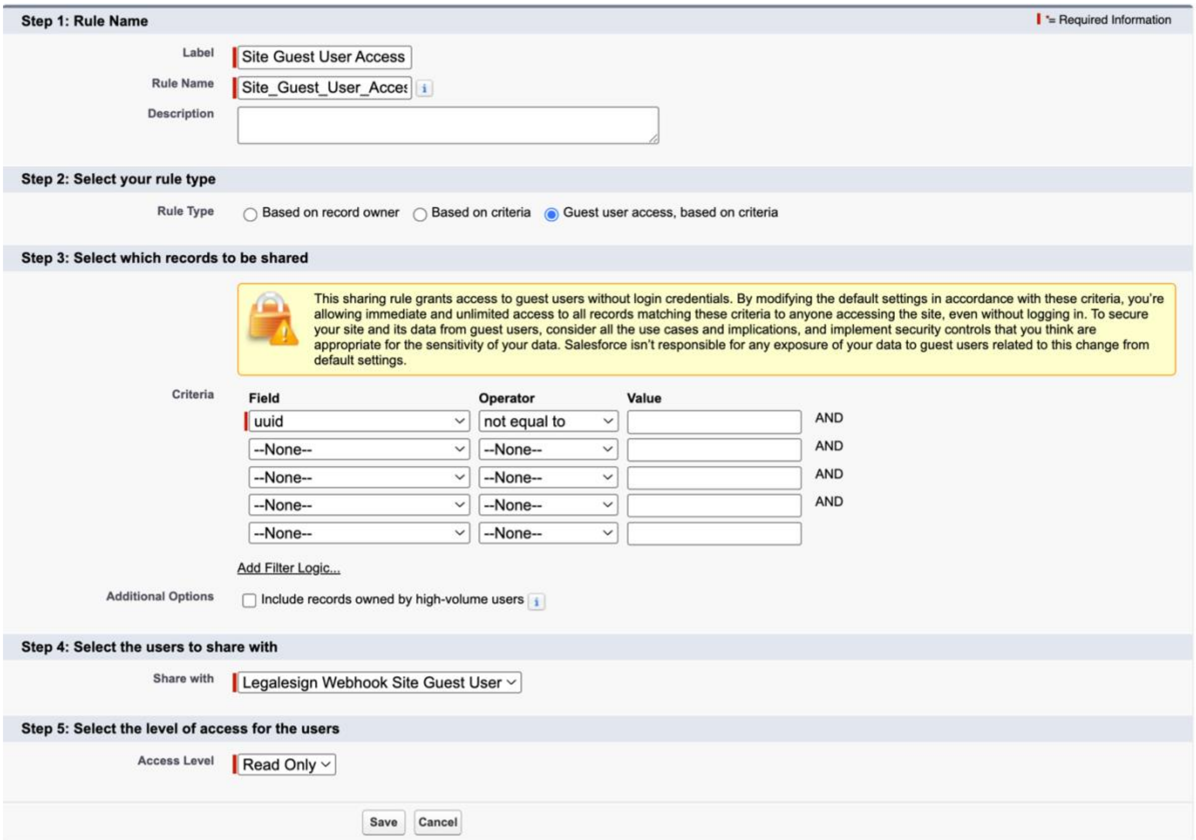


Create Salesforce Site Sharing Rule

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.



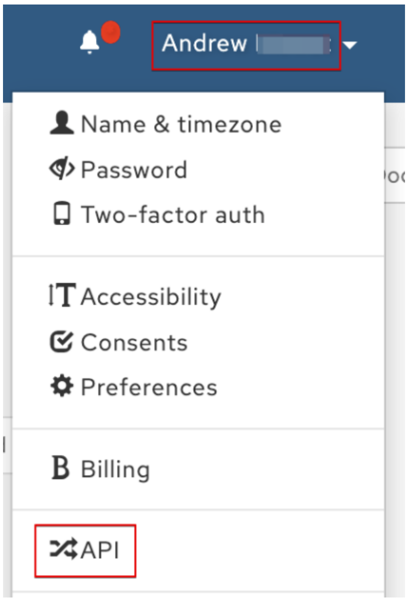
4. Enter ‘Site Guest User Access’ into the Label field.
5. Press the tab button and the Rule Name field will be automatically populated.
6. Select the Rule Type ‘Guest user access, based on criteria’.
7. Select the Field ‘uuid’, the Operator ‘not equal to’ and leave the value blank.
8. Press the ‘Save’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



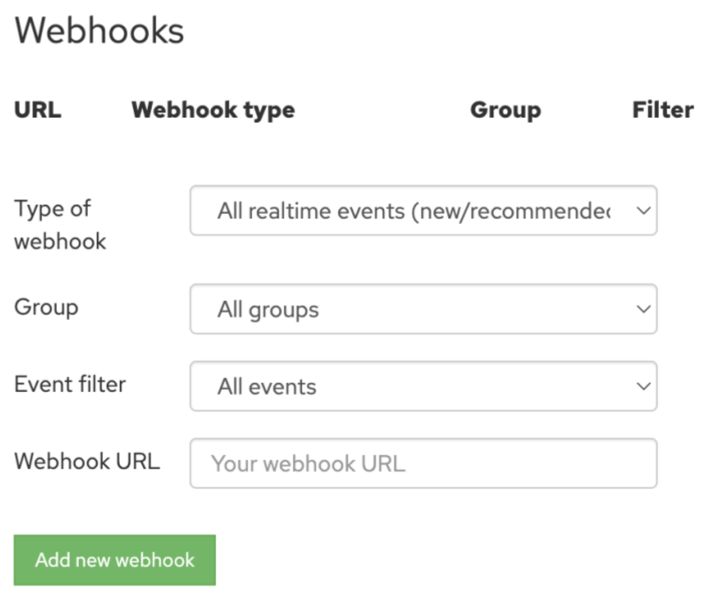
9. Press ‘OK’ to continue on the pop up window.

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.

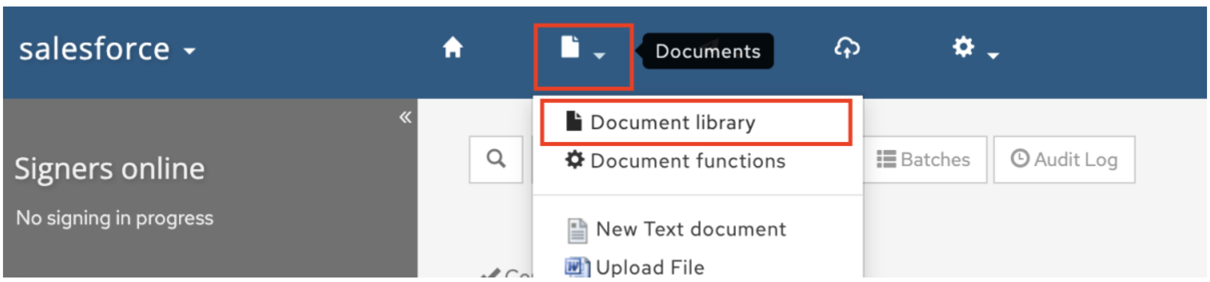


Setting up a Template

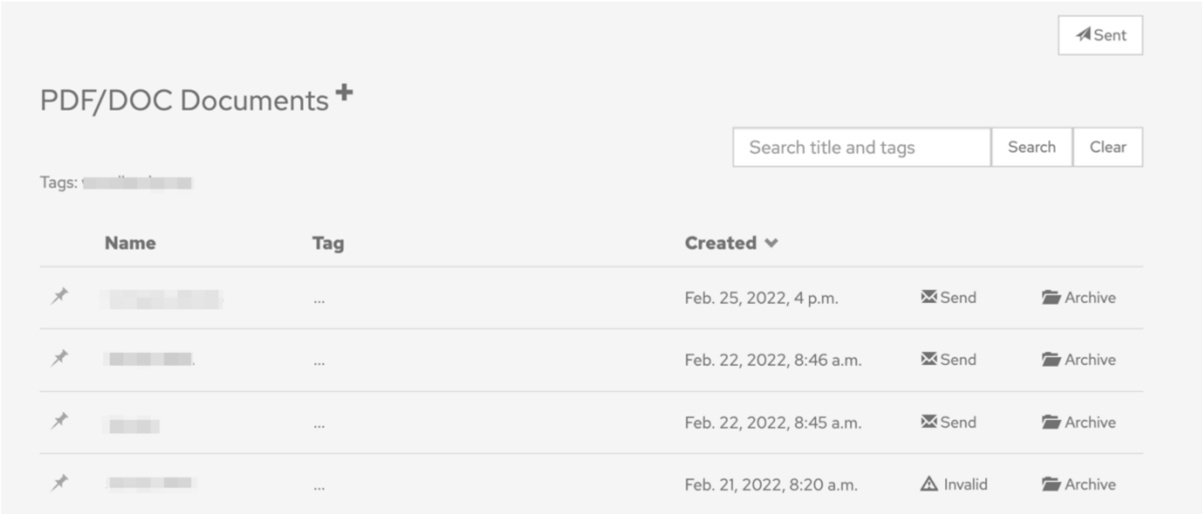
Setting up a Template in Legalesign

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:

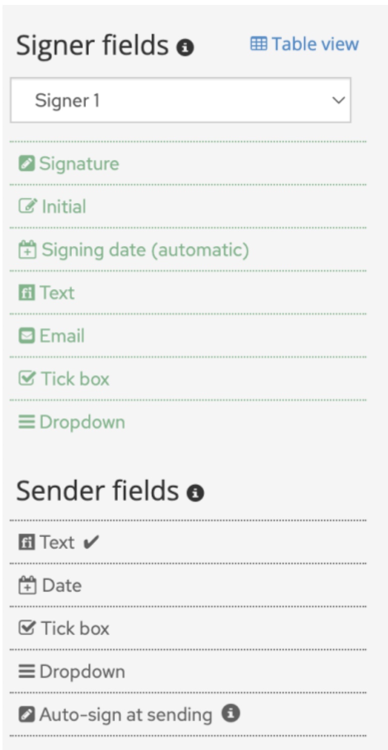
1. Clicking on the document icon on the main menu bar and selecting Document Library.



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



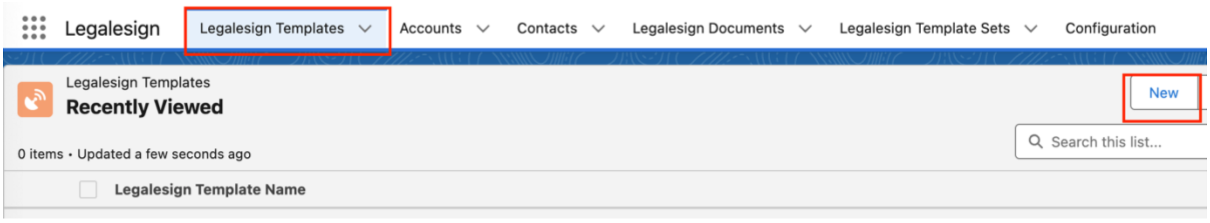
3. For more information on how to set up a Legalesign document – please use see our <u>help documentation</u>.
4. Click on a document name under the Name column.
5. To set up the fields to be displayed automatically on the document or collect information from the signer to be stored in Salesforce, use the Sender and the Signer fields respectively.



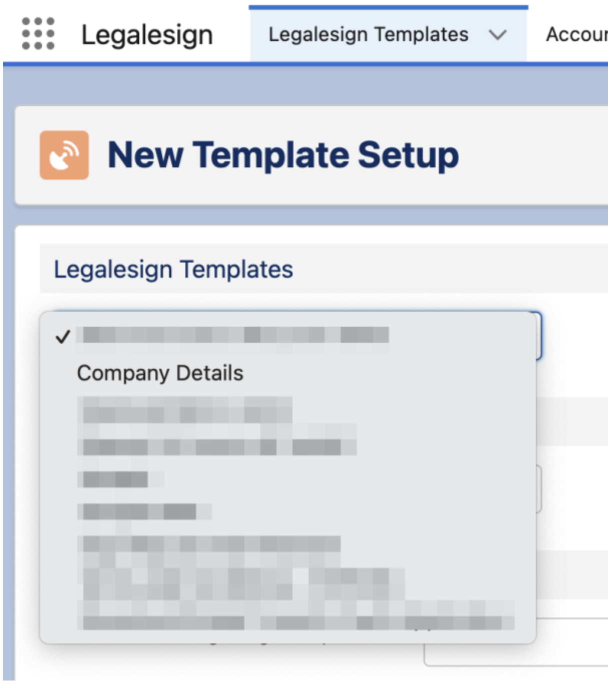
6. Select a field and drag it on to the page to the appropriate position.
7. Enter the required values and press the ‘Save’ button.

Mapping the Legalesign Template to Salesforce

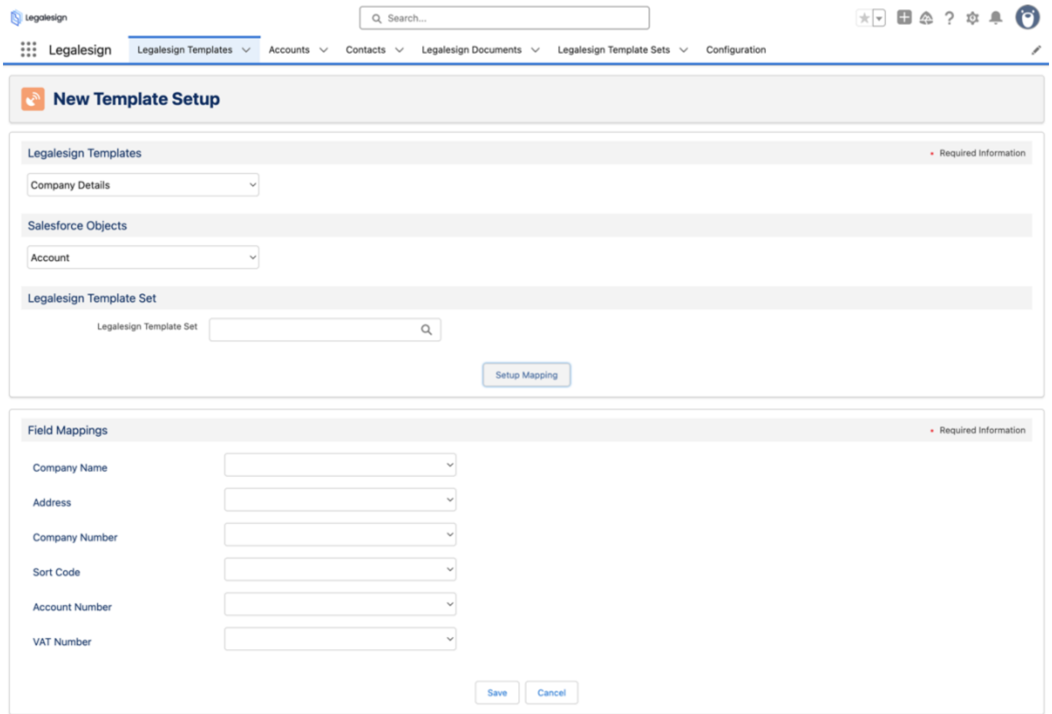
1. Click on the ‘Legalesign Templates’ tab within the Legalesign app.
2. Press the ‘New’ button on the right hand side.



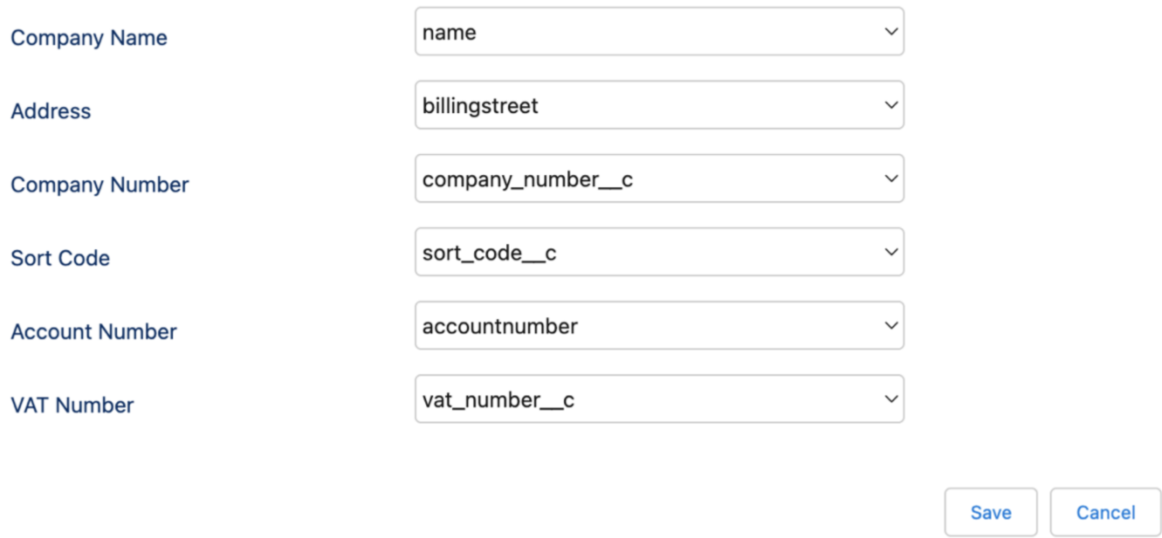
3. Select the name of the file from the list of Legalesign Templates. The templates displayed are those that are in the document library in Legalesign.



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.



7. For each field on the templated document, select the corresponding Salesforce field that it should map to.



8. Press the ‘Save’ button.
9. A new Legalesign Template will have been created with the file name “Object Name – Document Name”, e.g. Account – Company Details.

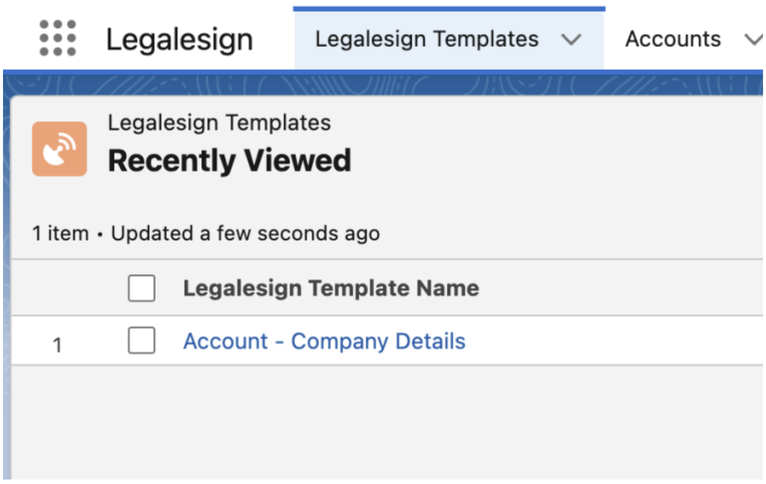
Generating the Template to be Signed

Setup Generate Button

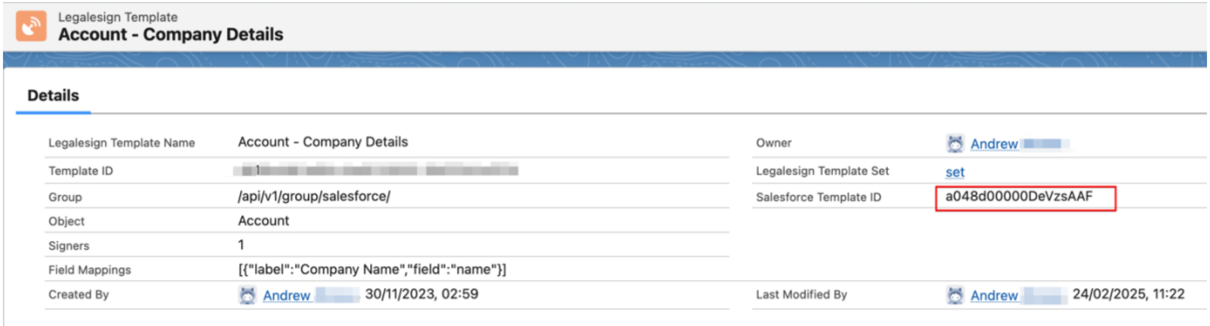
Before the template can be generated, a button must be created to allow the user to send the document for signing. To do this:

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.

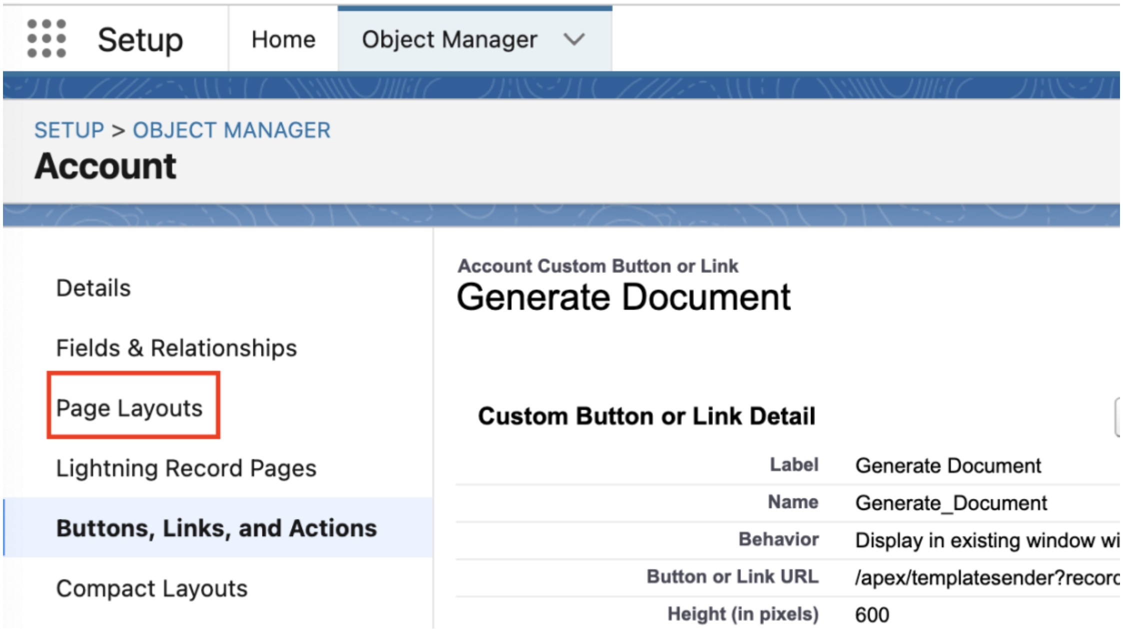


d. Copy this value and append it to the URL, therefore it would look something like /apex/legalesign__TemplateSender?recordid={!**Account**.Id}&templateid=**a07TU00000RujfdWEA**

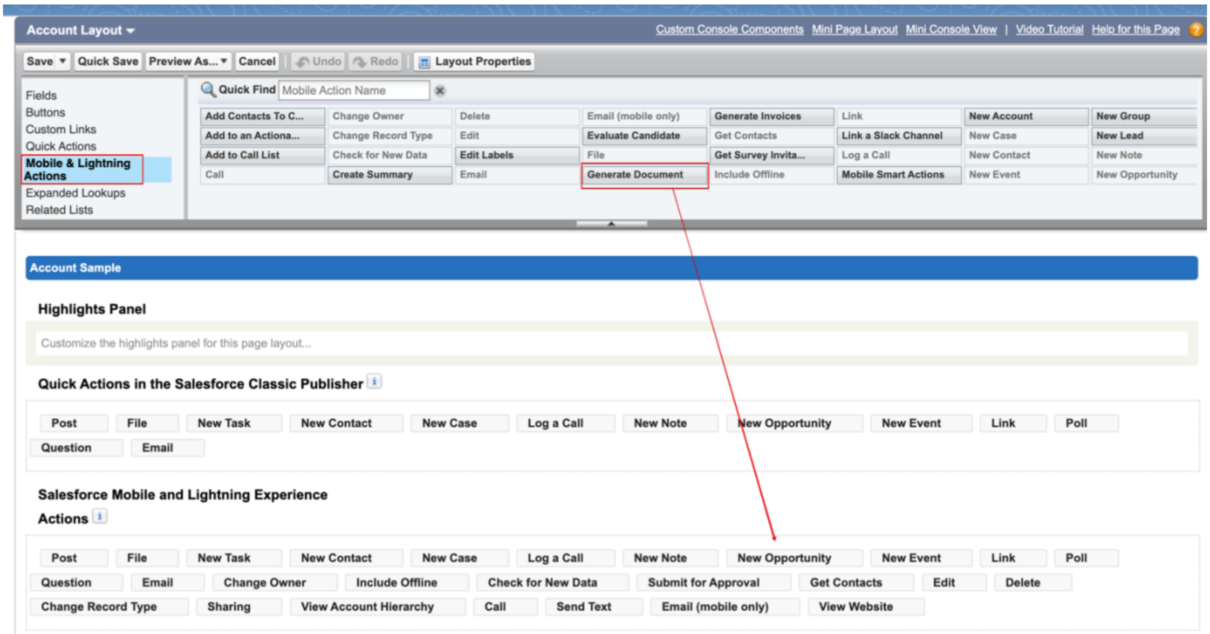
e. Press the ‘Save’ button.

Page Layout Changes

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

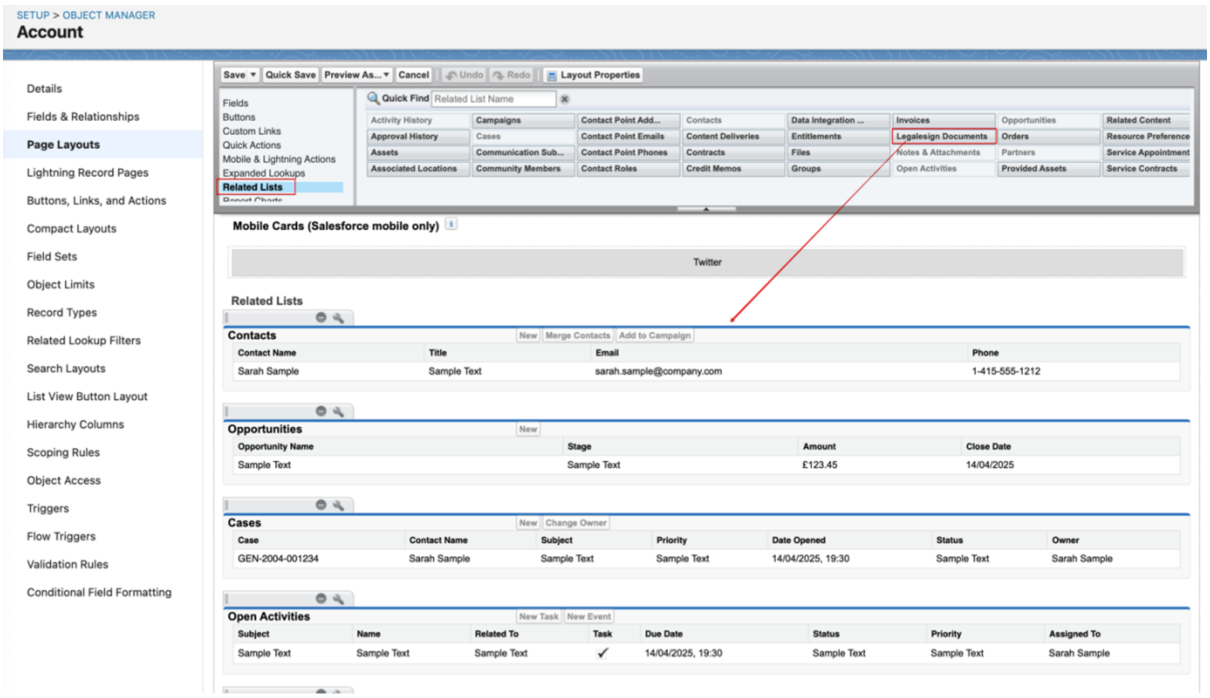


2. Select the page layout where the button should be displayed by clicking on the Page Layout Name.
3. Select Mobile & Lightning Actions, click on the name of the button created, then drag it into the section called 'Salesforce Mobile and Lightning Experience Actions'

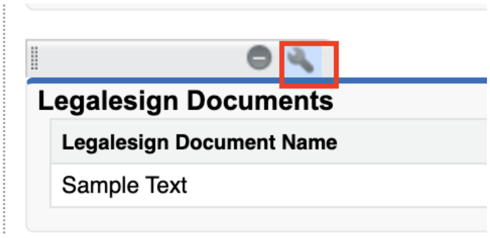


4. Press the 'Quick Save' button.
5. Next, click on 'Related Lists', select 'Legalesign Documents' and drag it into the Related Lists section, then press the 'Quick Save' button. This will appear by default on the following standard Salesforce objects – Account, Contract, Opportunity, Order and Contact.

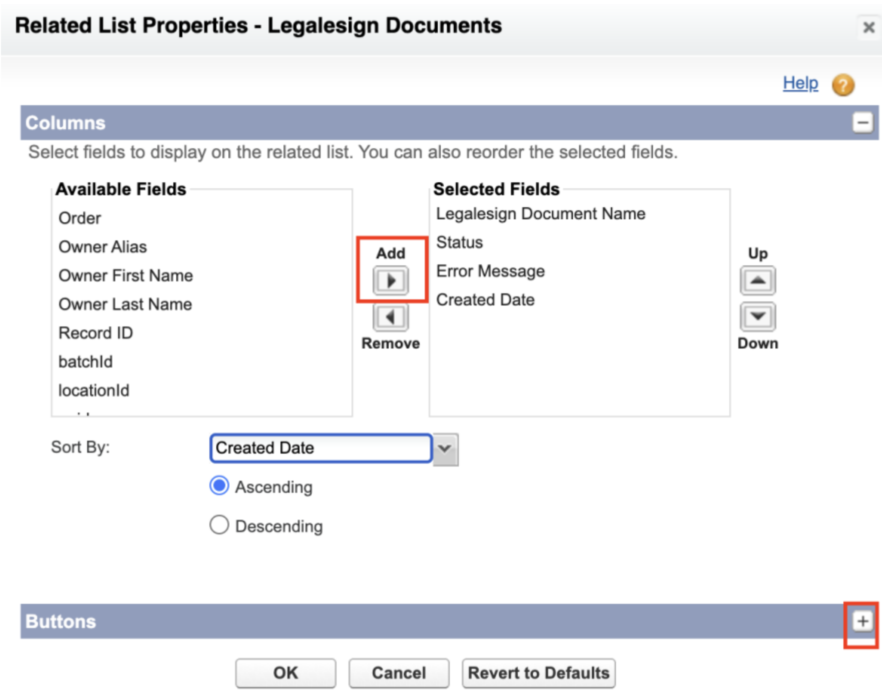
6. For a custom object, a lookup must be created first on the Legalesign Document object. To do this, follow the steps in a. below otherwise go to step 7.
    a. If using a custom object, create a look up field by:
        i. Navigating to the Object Manager and searching for ‘Legalesign Document’ in 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.



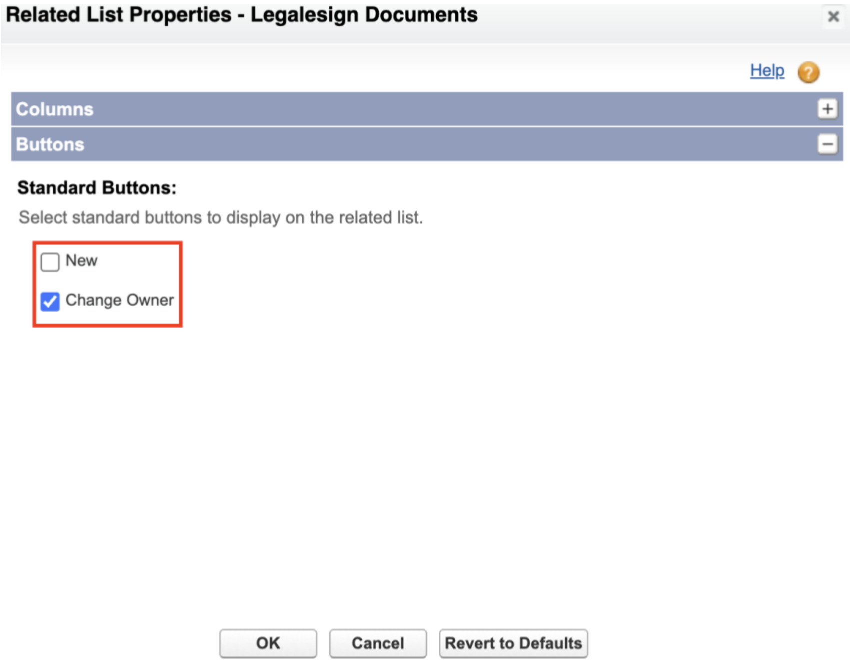
7. Press the Spanner icon next to the Legalesign Documents’ Related List.



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



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

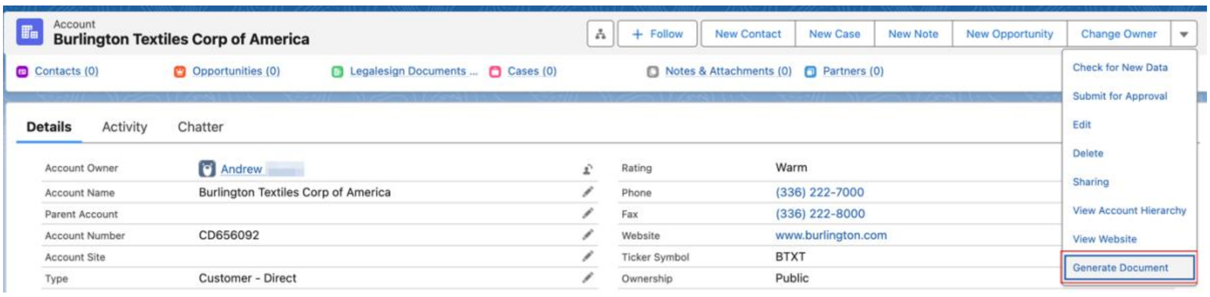


12. Press the ‘Save’ button on the page layout.
13. Select ‘Yes’ when asked whether the changes should overwrite users’ personal related list customizations.
14. Repeat steps 2-12 if the changes are required on more than one page layout.

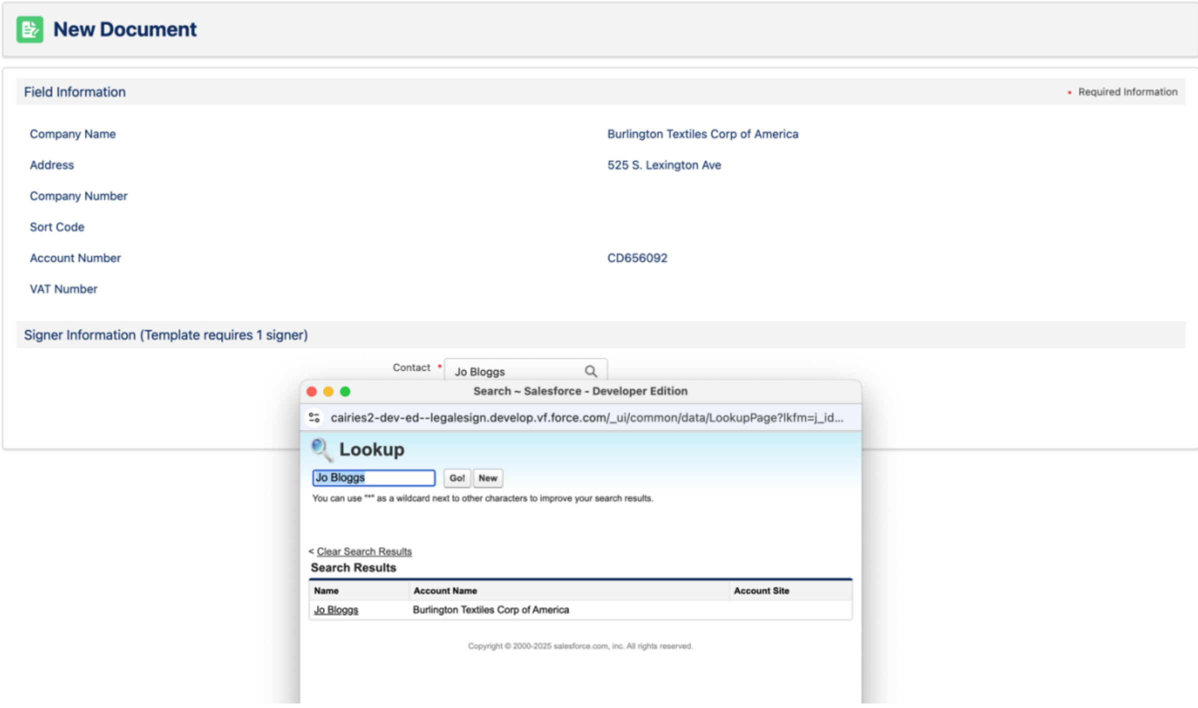
Generate Document

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

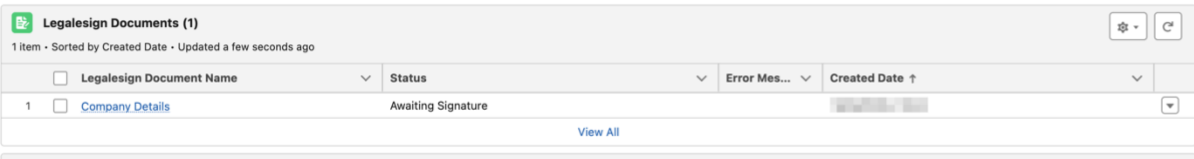
1. The button should appear in the list of buttons on the right hand side. If the button is not immediately visible, then press the down arrow button.



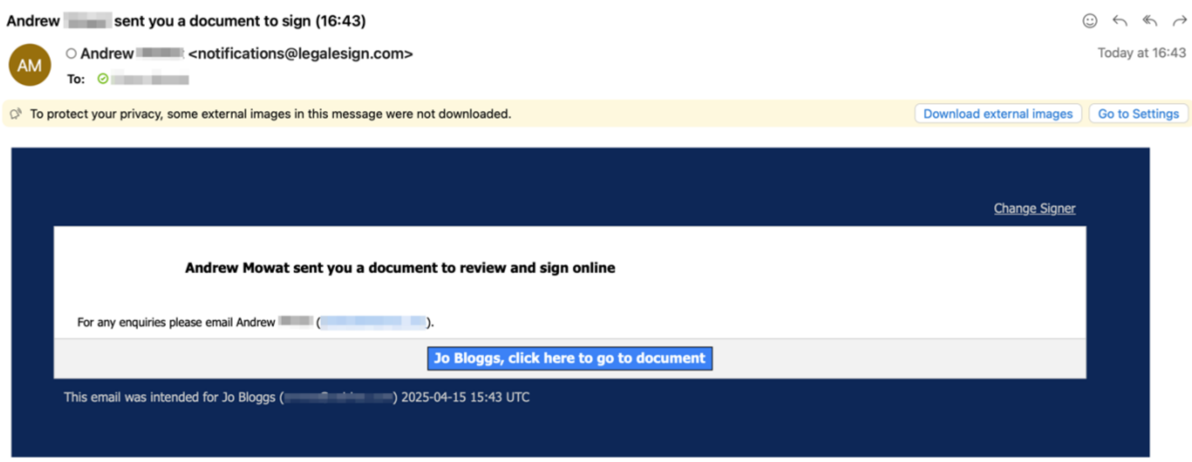
2. Click on the button created, e.g. ‘Generate Document’.
3. Search for the Contact who the document should be sent to by pressing the magnifying glass icon.
4. Enter the contact’s name in the Search field.
5. Click on the Name to select the contact.



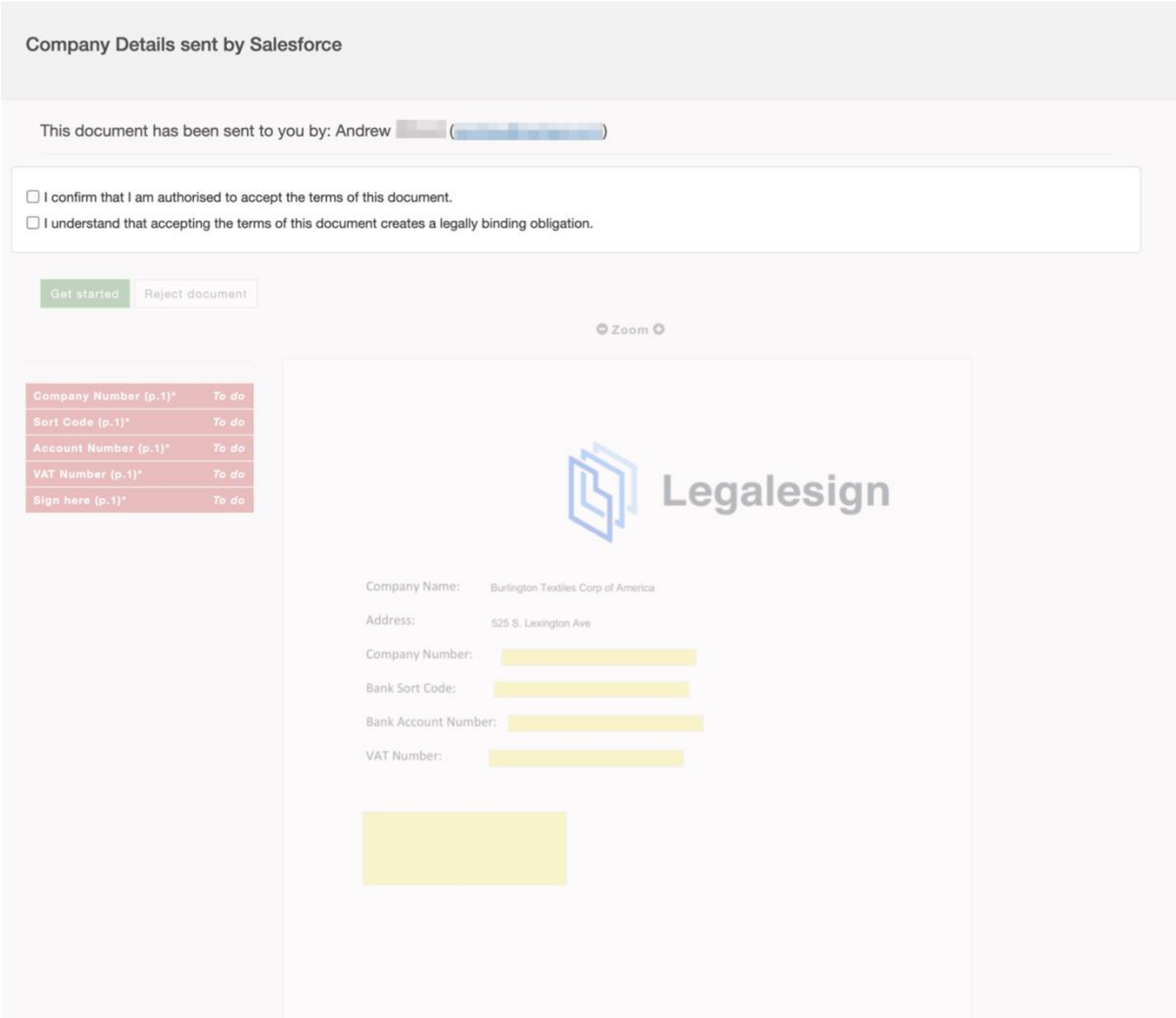
6. Press the 'Send for Signature' button.
7. On the object, click on the Legalesign Documents related list to view the document and its status



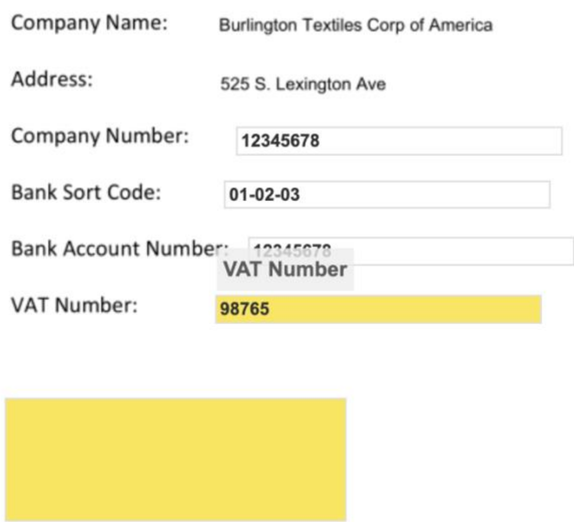
8. An email should also have been received:



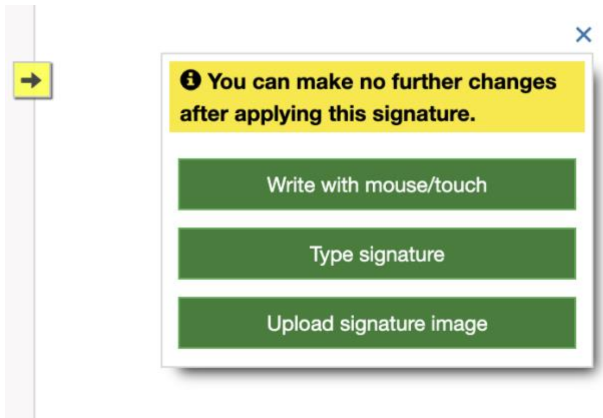
9. The user should click on the blue button to open the document.
10. The user must select the two checkboxes before then can proceed.



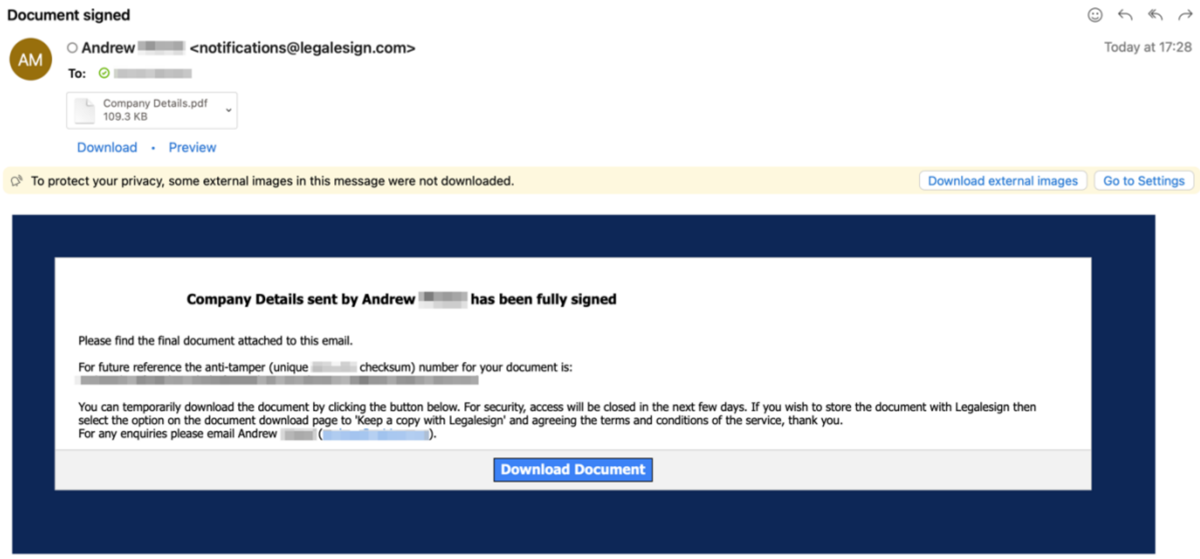
11. The user should press the green ‘Get started’ button.
12. Some information is already prepopulated from Salesforce. Other information must be provided by the user.



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.



Viewing Status of Sent Documents

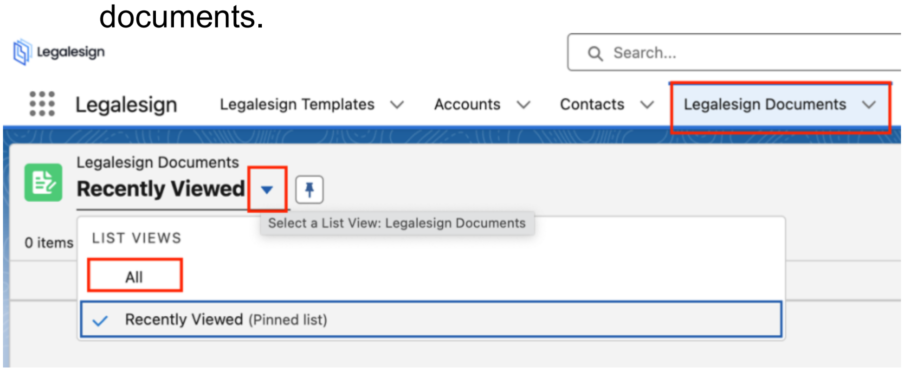
The status of the sent document can be viewed via the object where the button was created, in this case on the specific Account, or via the 'Legalesign Documents' tab.

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'.

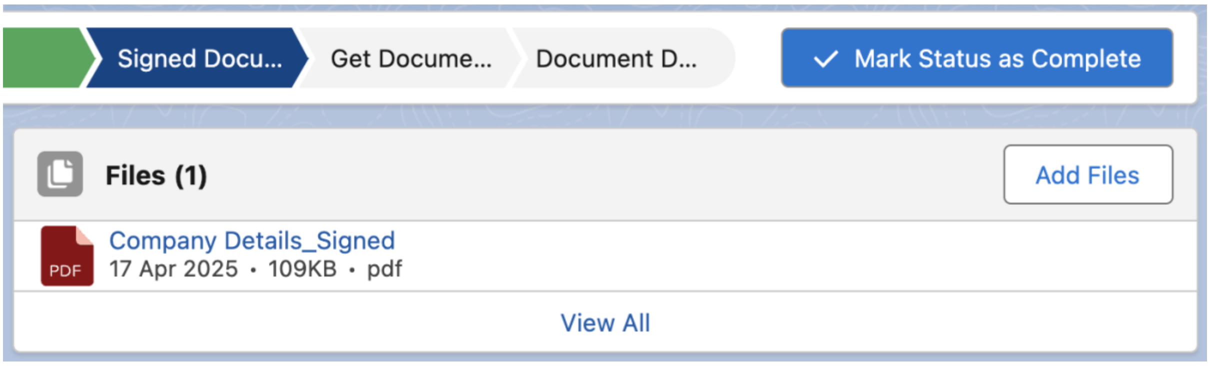
'Legalesign Documents' tab

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.

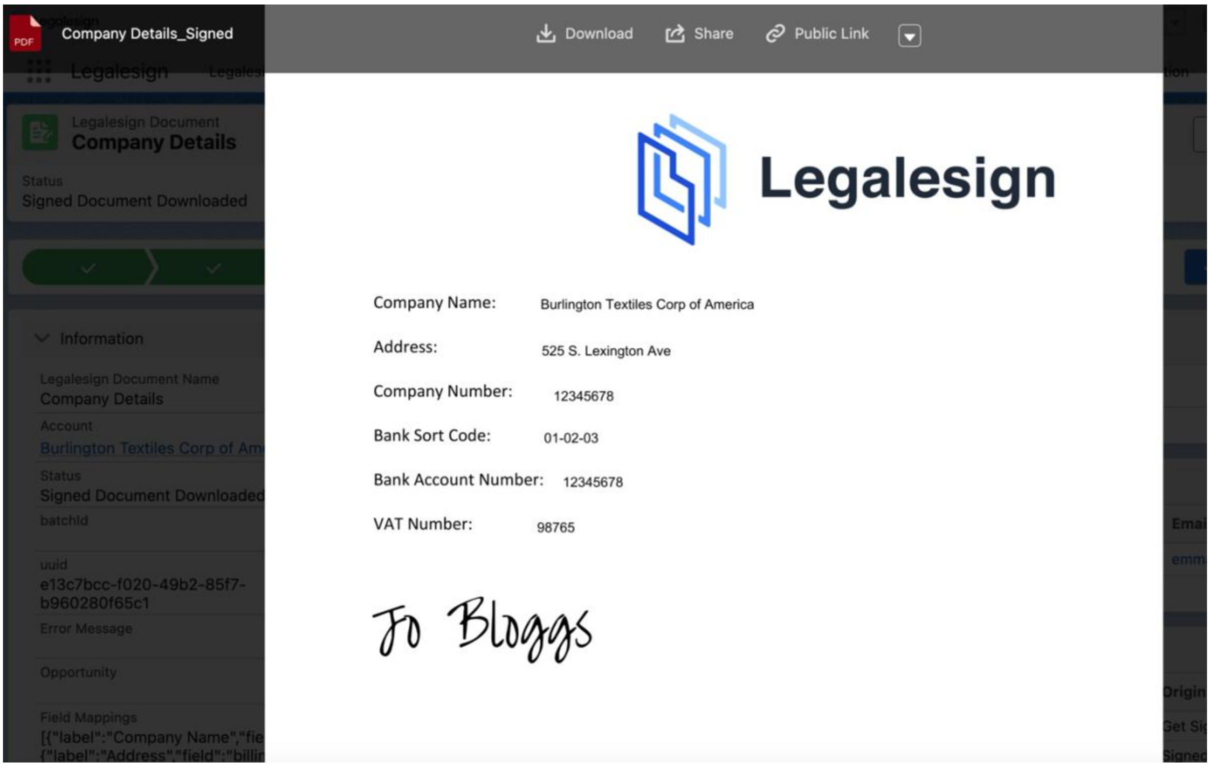


4. Click on the Legalesign Document Name.
5. The status of the document is shown in the path across the top of the screen.

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’.



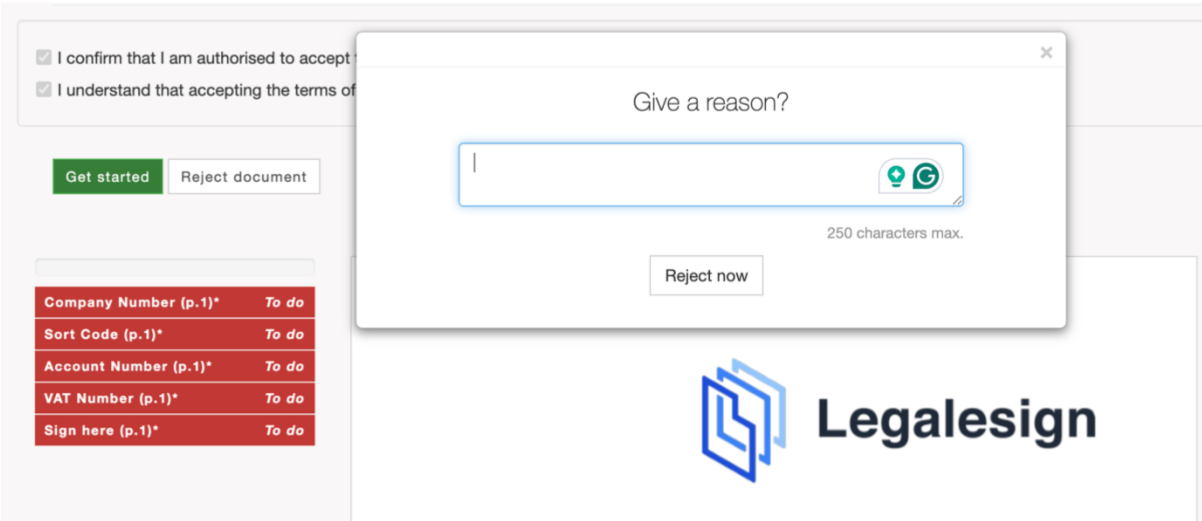
8. Click on the name of the file to view the document.



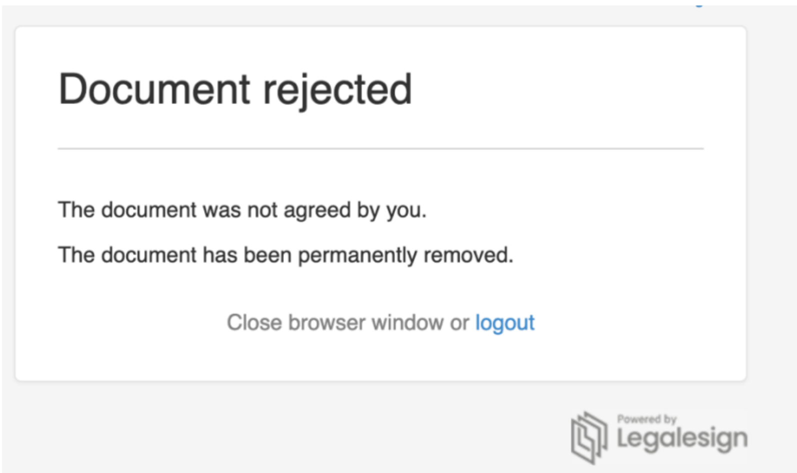
9. Update the status of the document to 'Get Document Data' following the steps described in step 6. This will automatically copy the data from the mapped fields on the document into Salesforce.
10. Navigate to the object where the document button was created. In this case on the Account object. This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

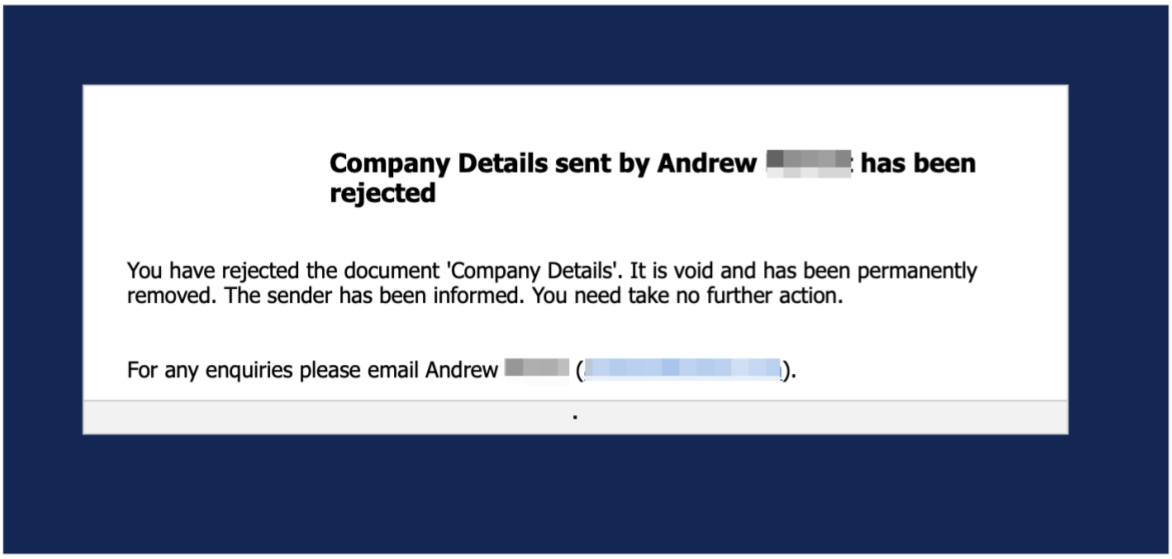


2. A message will be displayed to confirm the document has been rejected.

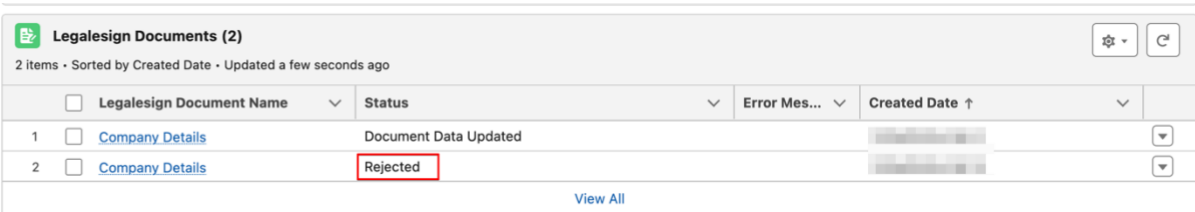


3. An email will also be sent to confirm the rejection.

![Legalesign eSignature for business]



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		[redacted]
2	Company Details	Rejected		[redacted]

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/