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SIGN Butler V2

Prerequisite:

a. Doc Config record for the Quote generation document
(refer to the Get Started section in https://www.pdfbutler.com/academy.html)

b. Signature placeholder (refer to this link
https://www.pdfbutler.com/academy.html?q=sign%20butler%20v2)

Copy and paste the signature placeholder to the document used in Item A. Reupload the document to the Doc Config record used in Item A.

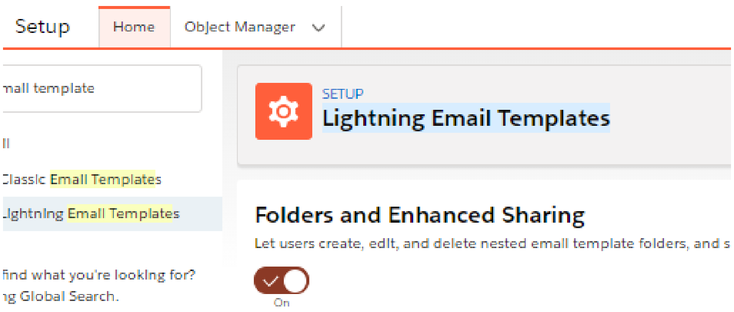
c. Data Source record for the Stakeholder

Create a new Data Source record for the Stakeholder and please see below sample SOQL.

SELECT OpportunityId, Contact.FirstName, Contact.LastName, Contact.Email, Contact.Id FROM OpportunityContactRole WHERE OpportunityId = :recordId

Steps to configure the New Sign Butler:

1. Enable Folders and Enhanced Sharing in Setup/Email/ Lightning Email Templates

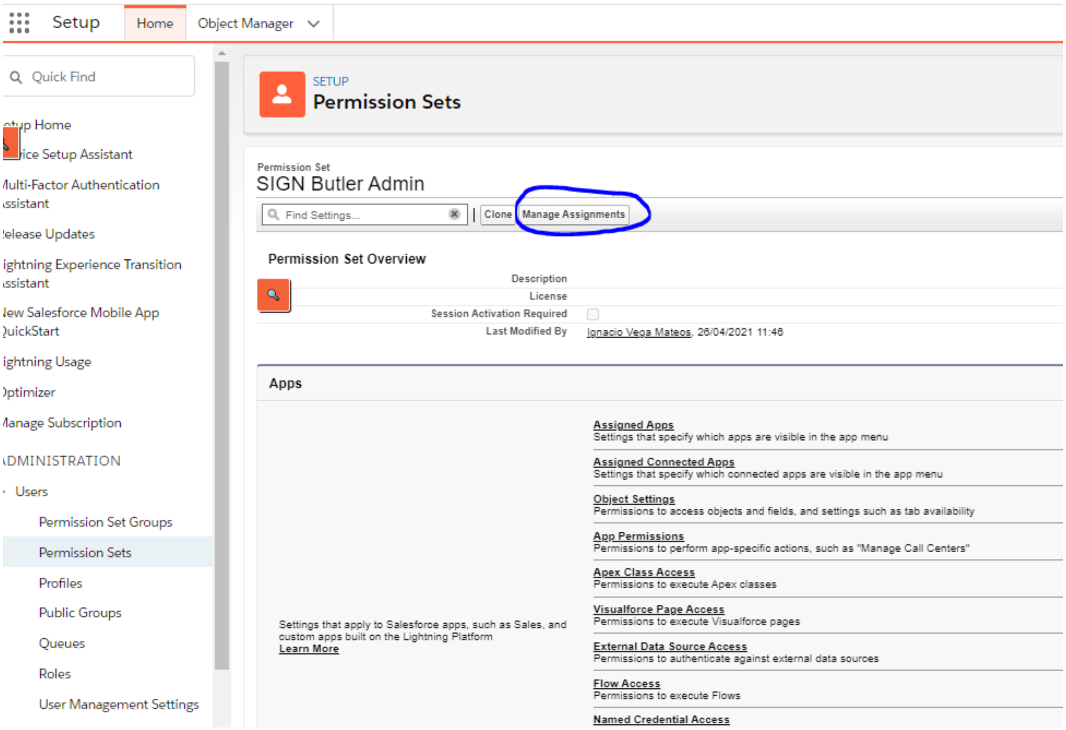


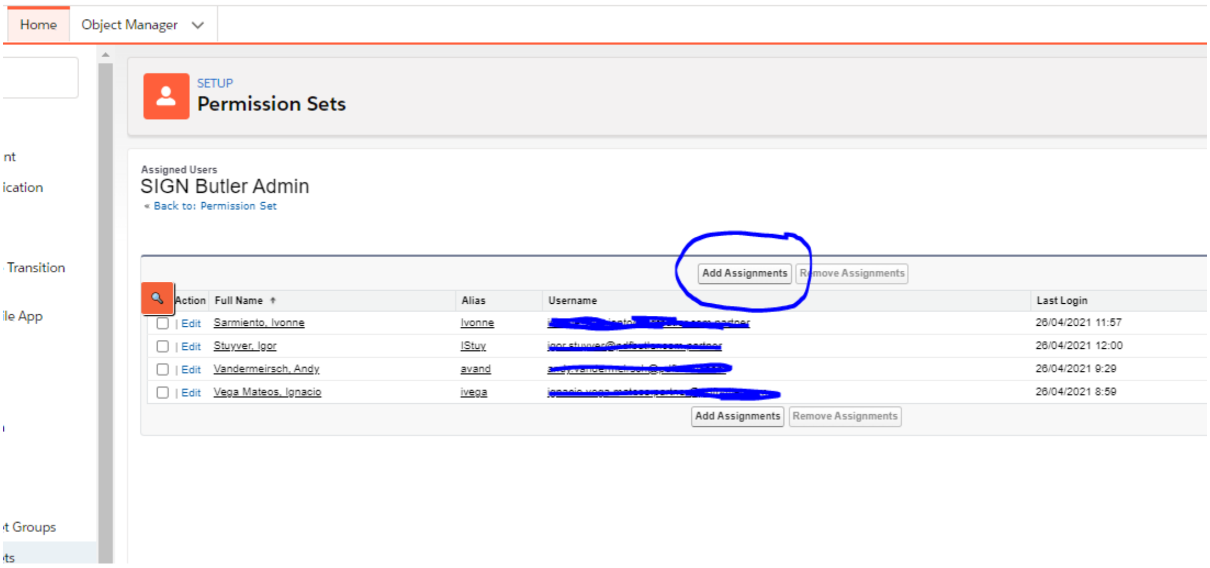
2. Install SIGN Butler

Use this URL to install it:
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000G0oZxUAJ

3. Assign the SIGN Butler Admin or SIGN Butler user permission set to the correct users:

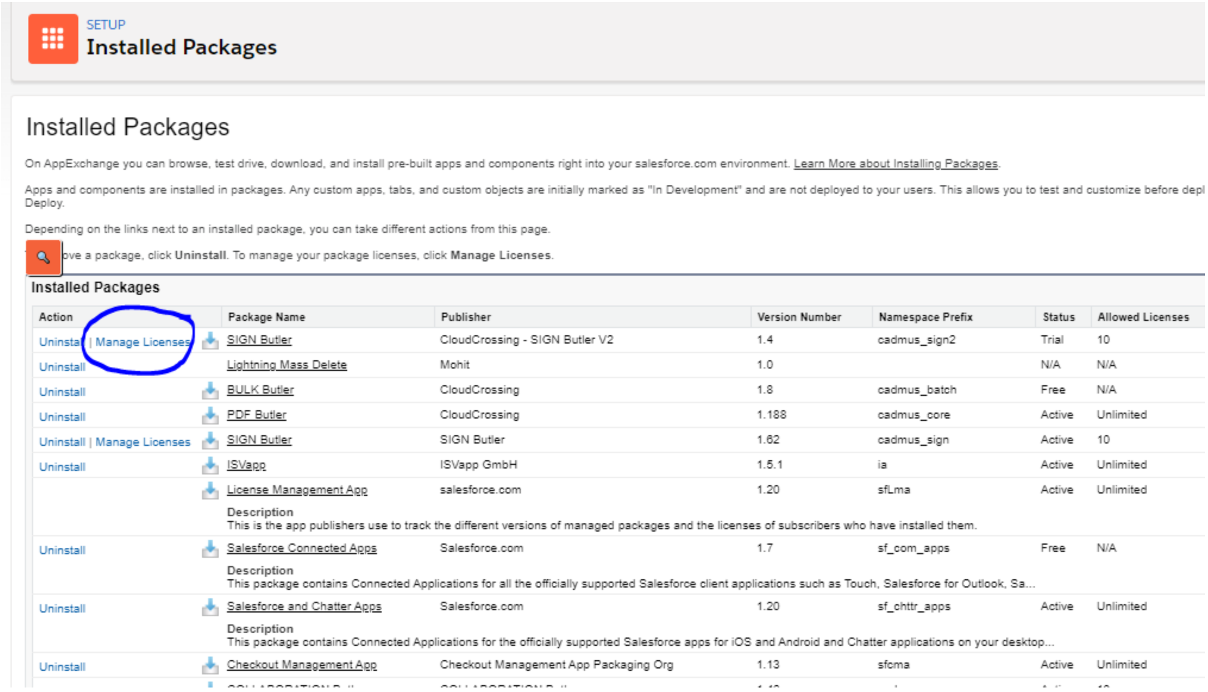
Go to Setup > Permission Set and look for the SIGN Butler permission sets, User or Admin, open it and click on the Manage Assignments button to assign the permission set to the right users.





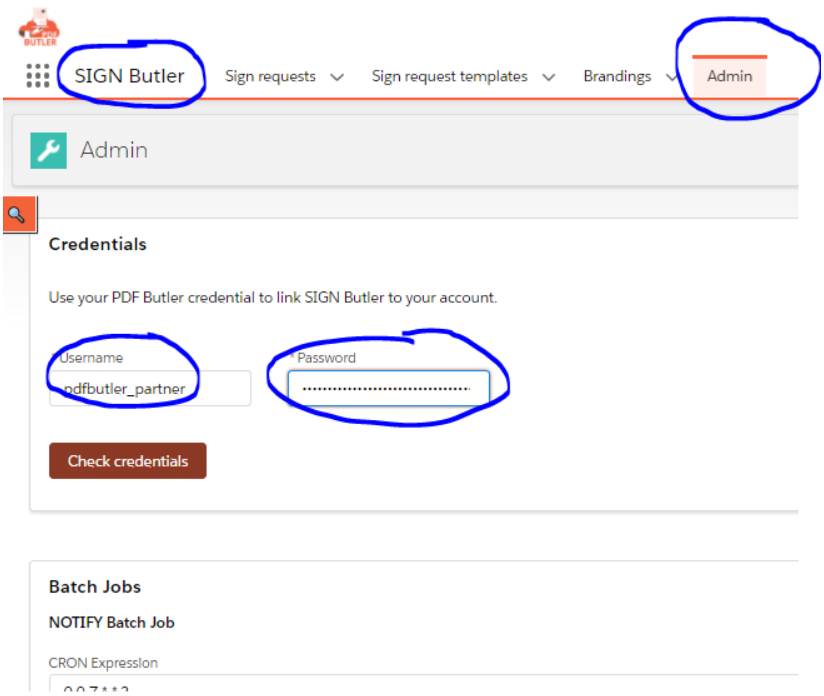
4. Assign a SIGN Butler License to the users

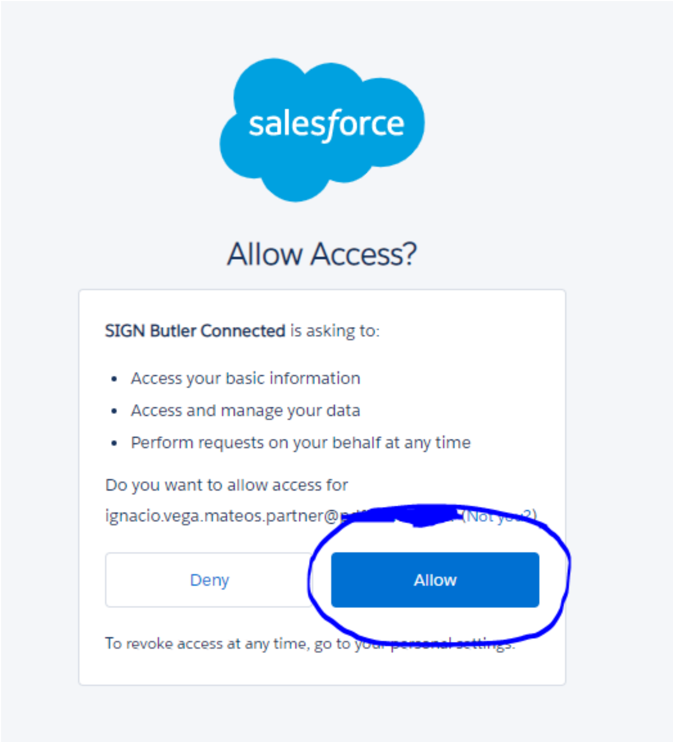
Go to Setup > Installed Packages and look for the SIGN Butler package. Click on Manage Licenses and assign a license to the users.



5. Register with SIGN Butler

Go to the SIGN Butler App and click on the Admin tab. Here you need to enter the PDF Butler Username and the PDF Butler Admin password. You should have received these credentials when you registered with PDF Butler:



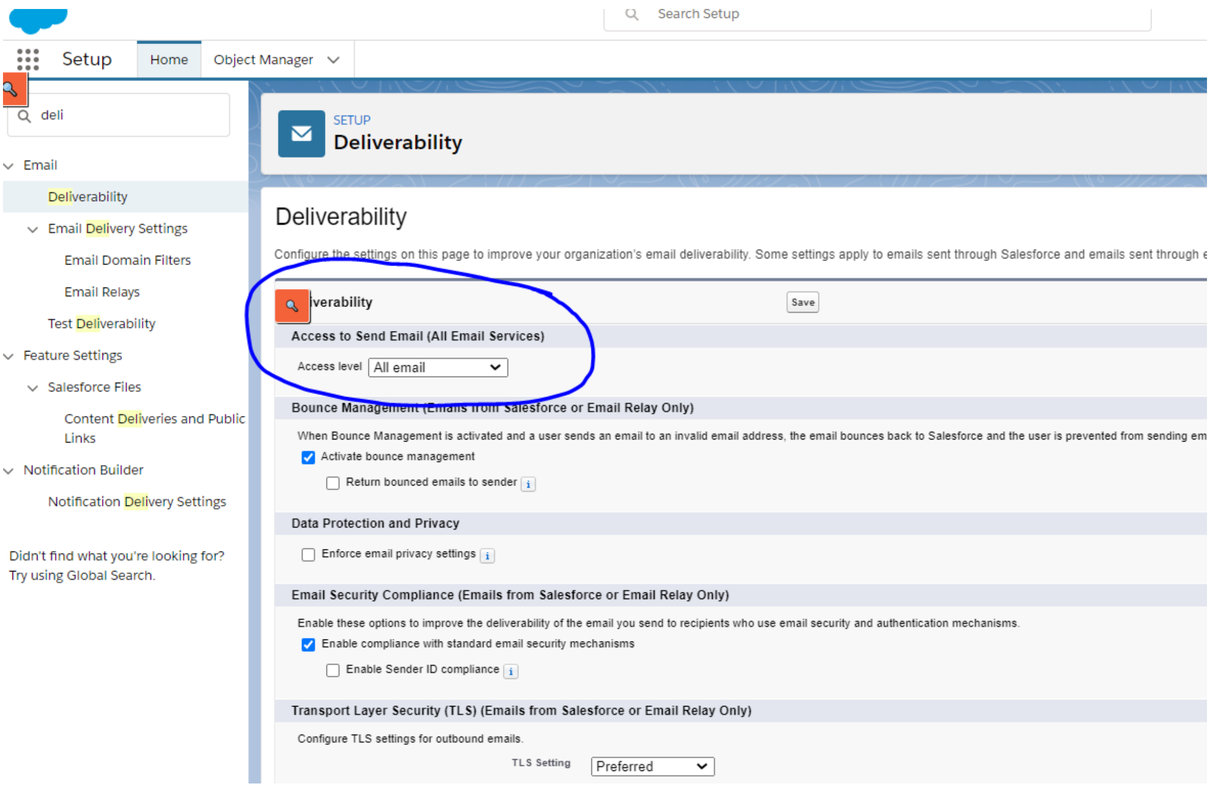


Congratulation

SIGNV2 Butler is now connected to your org : **https://pdfbutler.my.salesforce.com** with user **pdfbutler_partner**

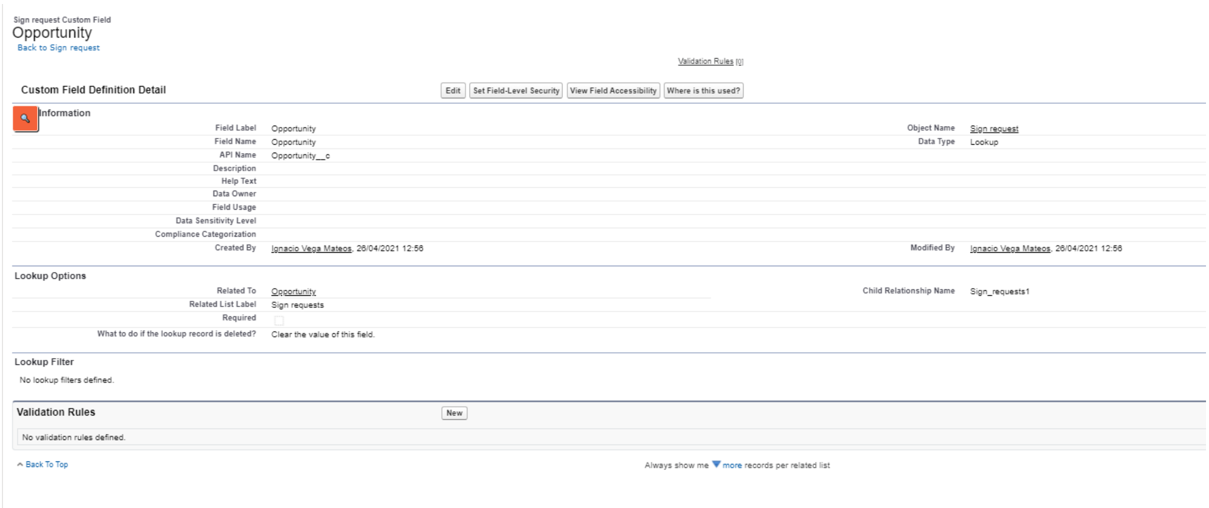
Close

6. Set Access level: All email from Setup > Deliverability



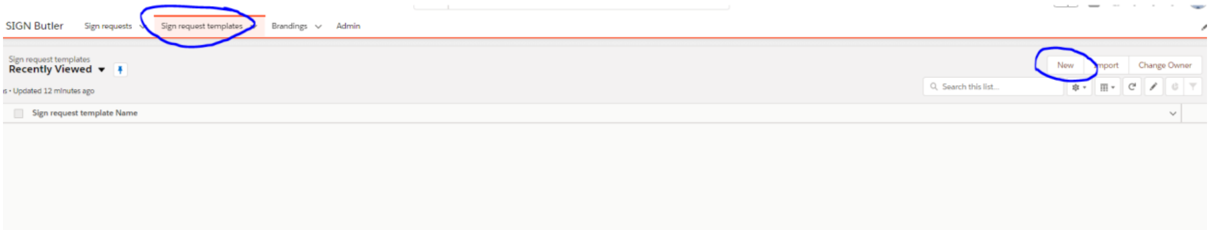
7. Create a lookup field in the object Sign Request:

You need to create a lookup field to the object from where you are going to be generating the document. By default, we provide with a lookup field to the Account object, so if you are going to be generating the document from the Account object, you can skip this step. In this case we will create a lookup to the Opportunity Object, do not forget to give the right permission the users to this field.



8. Create a new Sign Request Template:

Go to the SIGN Butler App, click on the tab Sign Request Template and click on New.



Fill the different fields:

Request template name: This is the name of the Sign request Template.

Select master object: Here you select the lookup field you created, so this means that the master object is the Opportunity Object. This is the object from where you will generate the document.

Select PDF Butler DataSource: Select the data source from where you will take the data we require for the Stakeholders, first name, last name, email…

master object field for sign request name: Select the field you are going to use to name the Sign Request which will be created when you send the document for signing. You can use any field from the master object. If you want to name in a specific way, you can create a formula field for it.

Branding: This will allow you to brand the signing page. In order to select any Branding, you need to create it in the Branding Tab. If you do not select anything, the PDF Butler branding will appear.

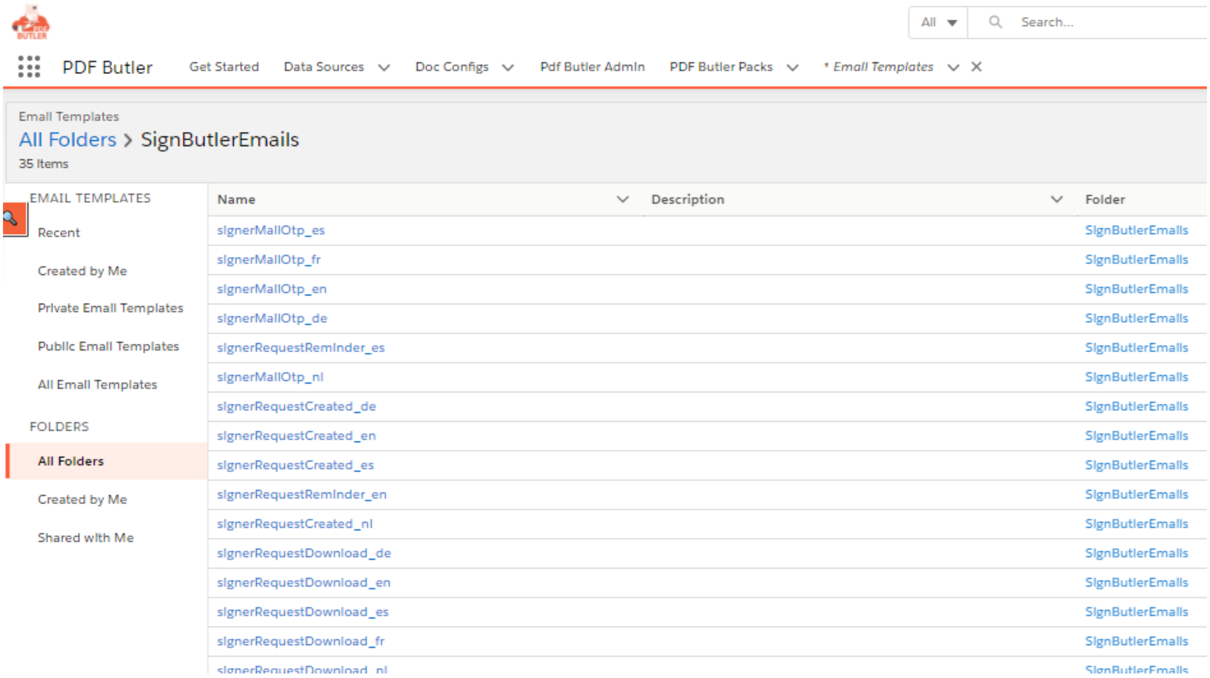
allow download of unsigned documents: This will allow the signer to download the document before signing it.

extra email merge fields datasource: This is in case you need to have more merge fields in the email templates.

Translation Data Source: This will allow you to translate to the right language the buttons etc in the signing page. When you install SIGN Butler, we create a data source called: Sign Request Translations. We will do the translation depending on what you select when you add the stakeholders for the language field, if you do not select anything, by default all will be in English.

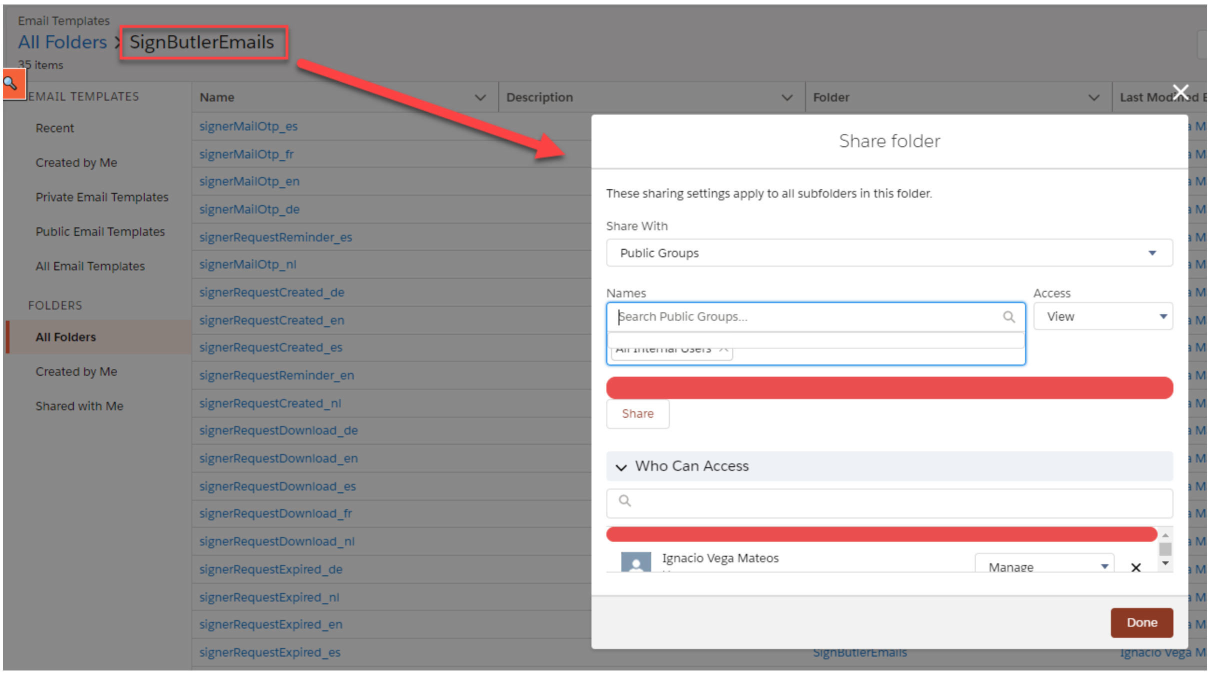
use Static OWA: If you want to send the email from a specific email address, you can use this option.

Email Template prefix: This is for the email template which will be used with SIGN Butler. If you leave it empty the default email templates installed with SIGN Butler will be used. This means the standard message and the PDF Butler logo will be used. If you want to use your own template, this is possible, you need to clone the ones we provide you with and rename it by adding a prefix, and this is what you need to use in this field.

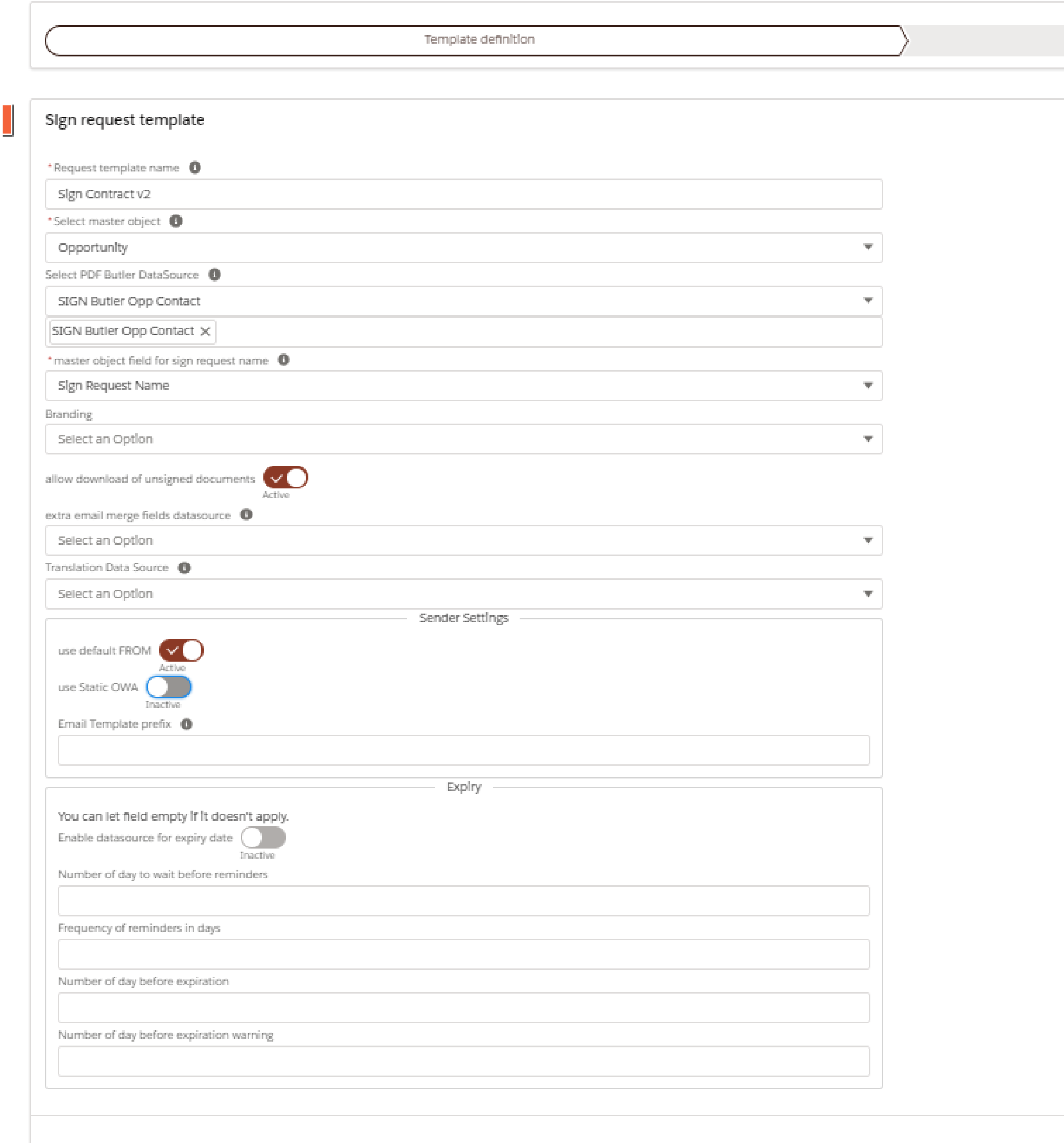


Make sure the sharing is done on this folder for all users using SIGN Butler!

If you want to create you own branded emails, also these have to be shared with all users



Expiry section: You enter here the settings related to the expiration of the Sign request.



Once you have finished the first page, you need to click on Next and then you can start entering the stakeholders.

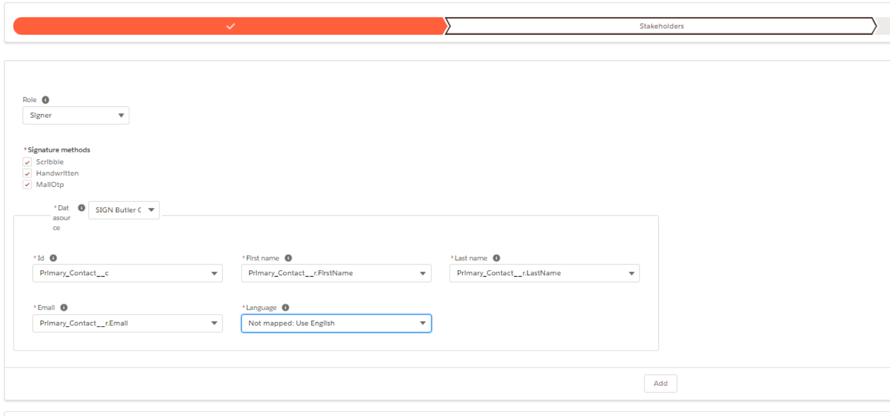
For now we just have the option to select Signers. Then you can select the Signing methods, you can select several signing methods at the same time.

Then select the Data source (which is created from the Item C in the Prerequisite section) from where we will select the different data we need for the signer and finally select the data in the different fields.

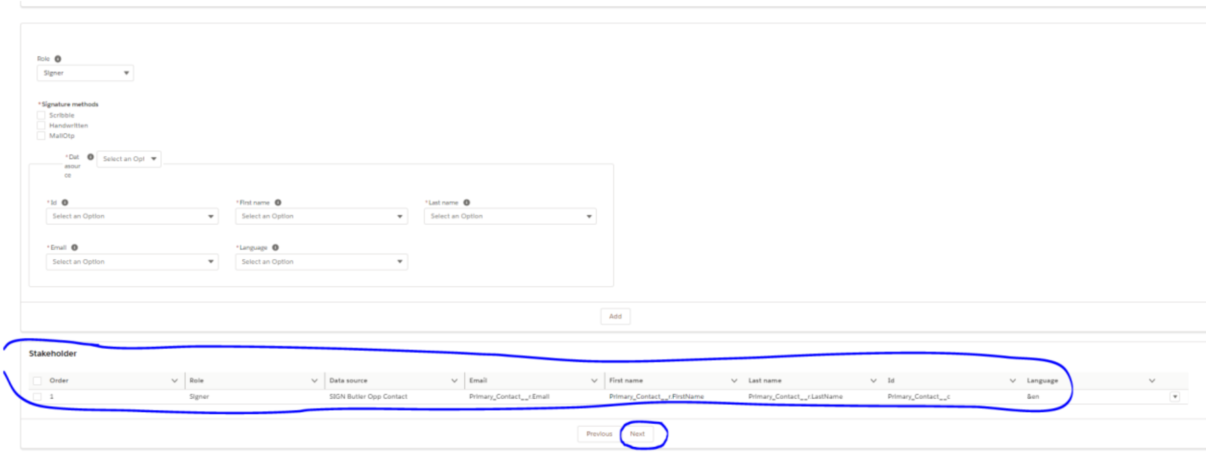
The language field will be used to select the language of the signing page and the email templates. You can select English, Dutch, French, German or Spanish for now. If you want to make it dynamic depending on the contact for example, this is also possible, you can select a field from the

Opportunity where you have the language value and we will use it. For this use case I have selected English.

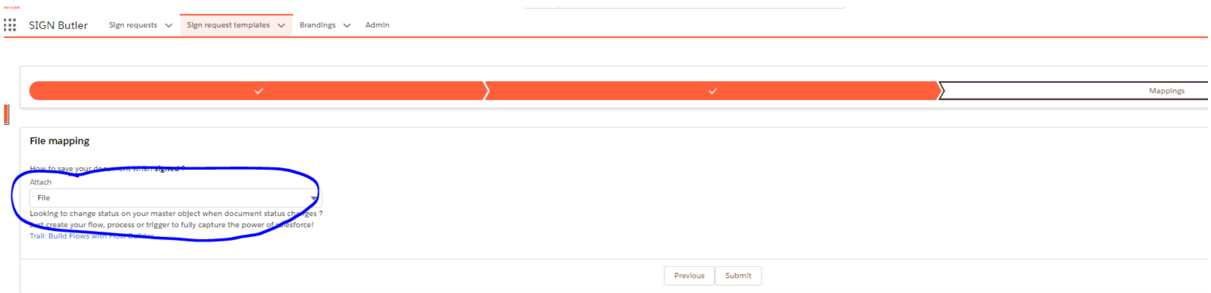
Once this is done, click on Add. It is possible to select several signers.



Click on Next once you have added all the stakeholders:



Then you need to select where the signed file will be saved. In this case I will select Files:



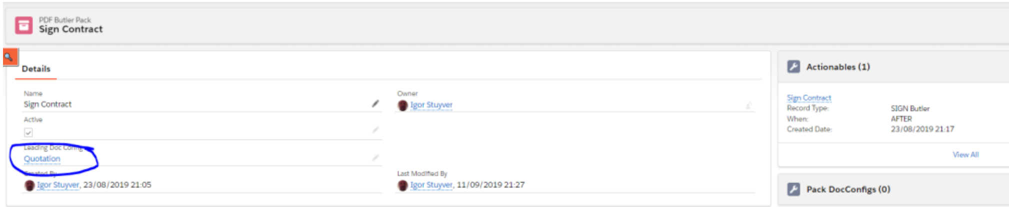
Click on Submit to save it.

9. Create a Pack and an actionable:

From the App Menu, search for the PDF Butler Packs and select New.

Fillin Leading Doc Config from the Item A in the Prerequisite section and click Save. Make sure the PDF Butler Pack is active.

On the Actionables related list click New and select Sign Butler record type. Make sure the Actionable is active.



Then create the SIGN Butler Actionable:

Actionable Name: It is just the name of this actionable.

Class: cadmus_sign2.Actionable_SignButlerSilent.

When: It is always AFTER.

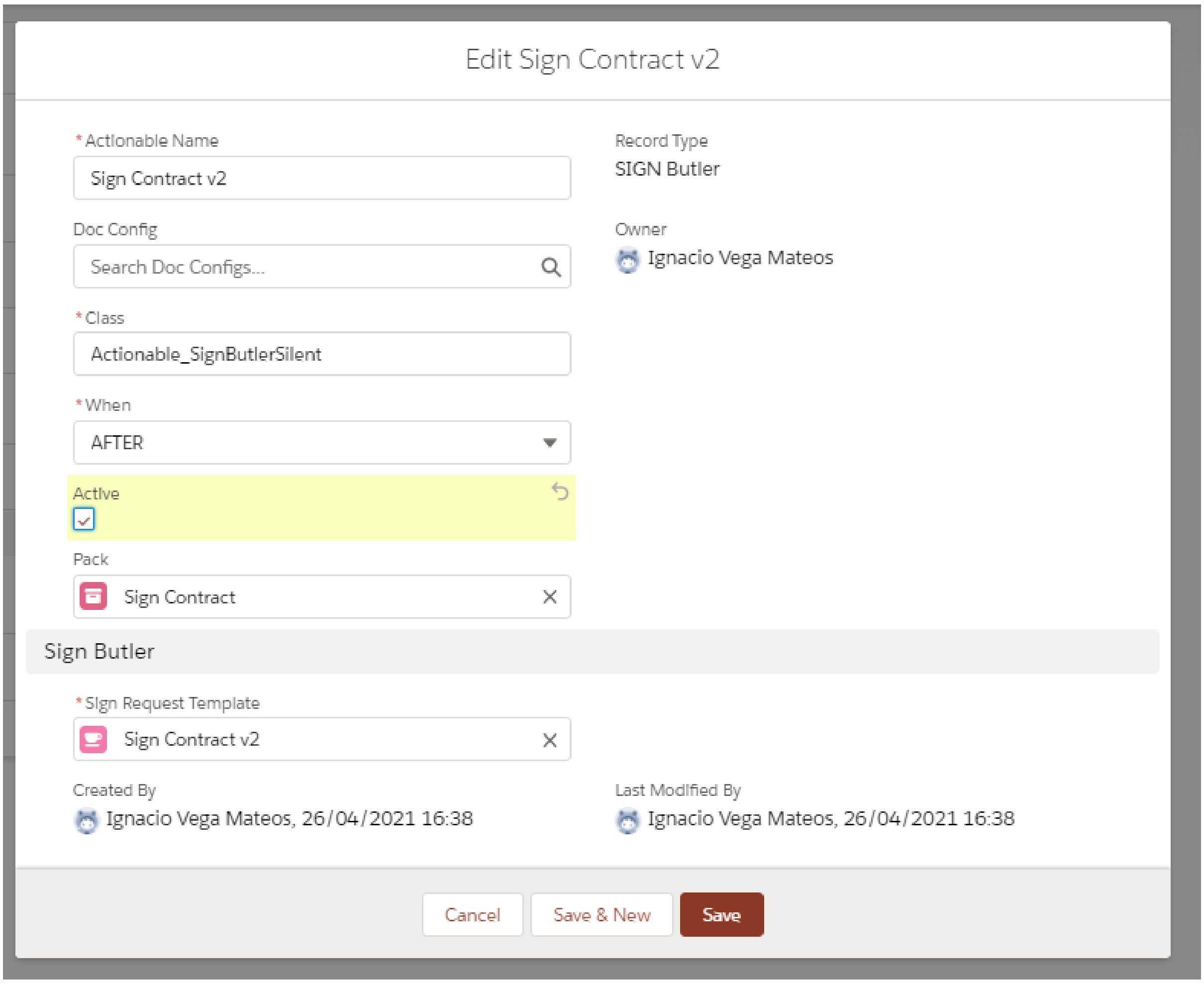
Active: This needs to be checked.

Pack: This is the pack we just created.

Sign Request Template: Select the one we just created.

Note: If you want to get directly redirected to the signing page (Sign Now). You just need to use in the Class field in the Actionable: cadmus_sign2.Actionable_SignButlerSignNow

This will redirect you directly to the signing page and the email to the signer will not be sent.



10. Add signing tag to the template.

You need to tag the template, in this way when the document is sent, the signers will be able to add their signatures. In order to tag the template you need to add a pictures to it.

Please see instruction on the Prerequisite section Item B.

See sample below:

Thank you for your inquiry dated: [[!TODAY!]]
We are pleased to quote you the following:

Product	Quantity	Total Price
[[!PROD_NAME!]]	[[!PROD_QUANTITY!]]	[[!PROD_TOTAL_PRICE!]]
	Total:	**[[!OPP_AMOUNT!]]**

We will be happy to supply you any further information you may need and trust that you call on us to fill your order, which will receive our prompt and careful attention.

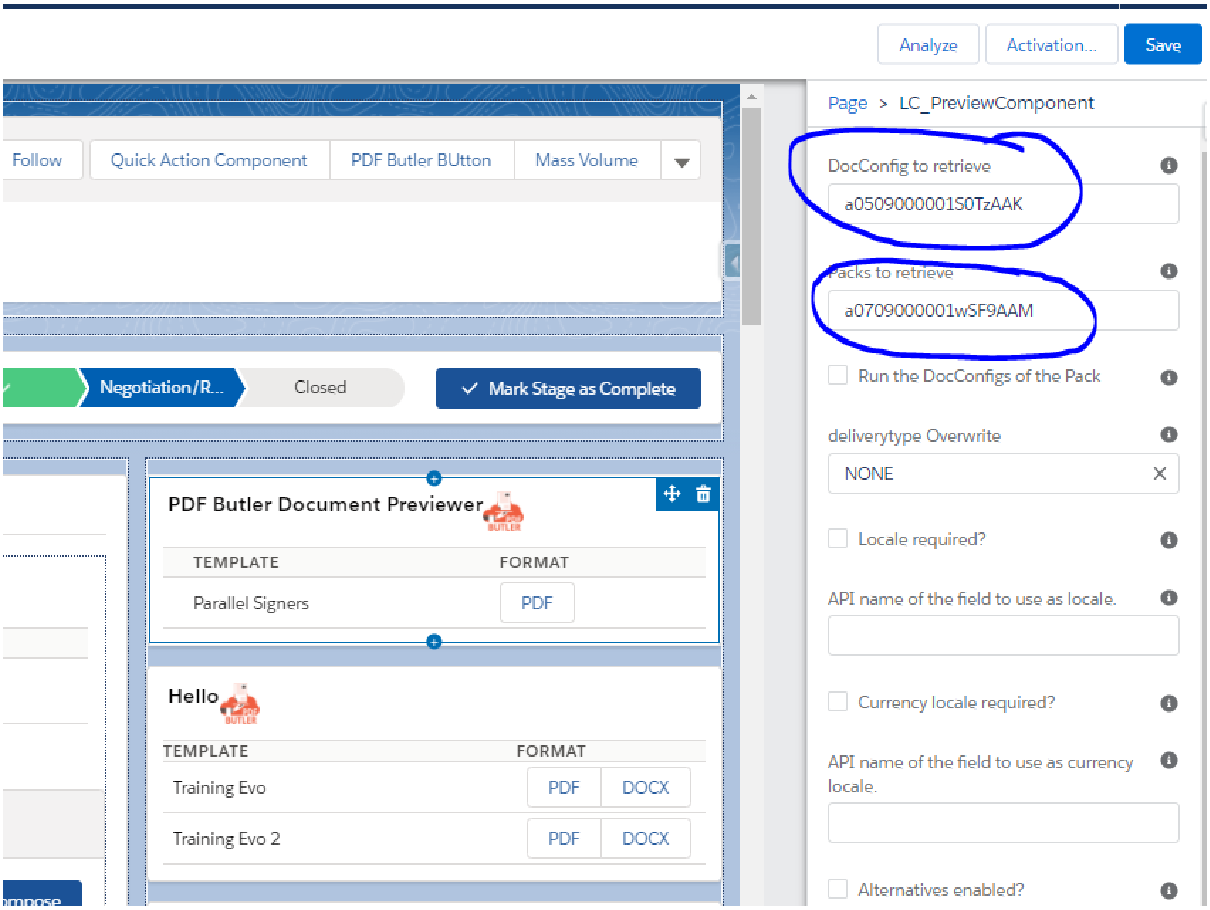
Signature and date:

Igor Stuyver
[[!TODAY!]]

Customer Name
[[!CUST_NAME!]]

11. Add the Previewer component to the lightning page.

Go to one of the opportunity records and add the PDF Butler Document Previewer component. In the component add the Leading Doc Config record Id you are using in the PDF Butler Pack record and also the PDF Butler Pack Id and save it.



12. Test the Sign Butler

Click PDF button on the PDF Butler Document Reviewer and a Preview file is shown. Click Sign Pack and the file is forwarded to the Stakeholder for their signature.