

CloudCrossing BVBA
Dahlialaan 1
2950 Kapellen
Belgium



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.

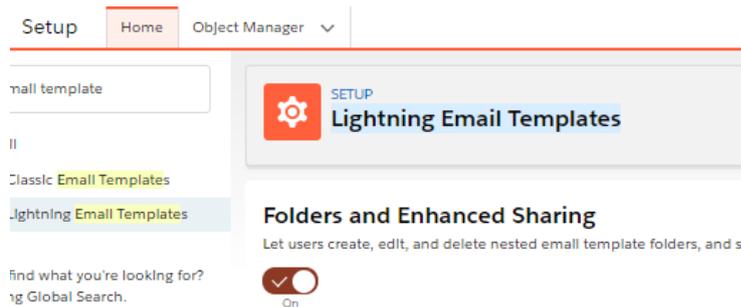
- c. Data Source record for the Stakeholder

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.

Setup Home
 License Setup Assistant
 Multi-Factor Authentication Assistant
 Release Updates
 Lightning Experience Transition Assistant
 New Salesforce Mobile App QuickStart
 Lightning Usage
 Optimizer
 Manage Subscription

ADMINISTRATION
 Users
 Permission Set Groups
Permission Sets
 Profiles
 Public Groups
 Queues
 Roles
 User Management Settings

Permission Set
SIGN Butler Admin
 Find Settings... | Clone | **Manage Assignments**

Permission Set Overview

Description
 License
 Session Activation Required
 Last Modified By [Ignacio Vega Mateos](#), 26/04/2021 11:46

Apps

Assigned Apps
 Settings that specify which apps are visible in the app menu

Assigned Connected Apps
 Settings that specify which connected apps are visible in the app menu

Object Settings
 Permissions to access objects and fields, and settings such as tab availability

App Permissions
 Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
 Permissions to execute Apex classes

Visualforce Page Access
 Permissions to execute Visualforce pages

External Data Source Access
 Permissions to authenticate against external data sources

Flow Access
 Permissions to execute Flows

Named Credential Access

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Home | Object Manager

Permission Sets

Assigned Users
SIGN Butler Admin
[Back to: Permission Set](#)

Add Assignments | Remove Assignments

Action	Full Name	Alias	Username	Last Login
<input type="checkbox"/> Edit	Sarmiento, Ivonne	Ivonne	[redacted]	26/04/2021 11:57
<input type="checkbox"/> Edit	Stuyver, Igor	IStuy	igor.stuyver@[redacted]	26/04/2021 12:00
<input type="checkbox"/> Edit	Vandermairsch, Andy	avand	andy.vandermairsch@[redacted]	26/04/2021 9:29
<input type="checkbox"/> Edit	Vega Mateos, Ignacio	ivega	ignacio.vega.mateos@[redacted]	26/04/2021 8:59

Add Assignments | Remove Assignments

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.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deployment.

Depending on the links next to an installed package, you can take different actions from this page.

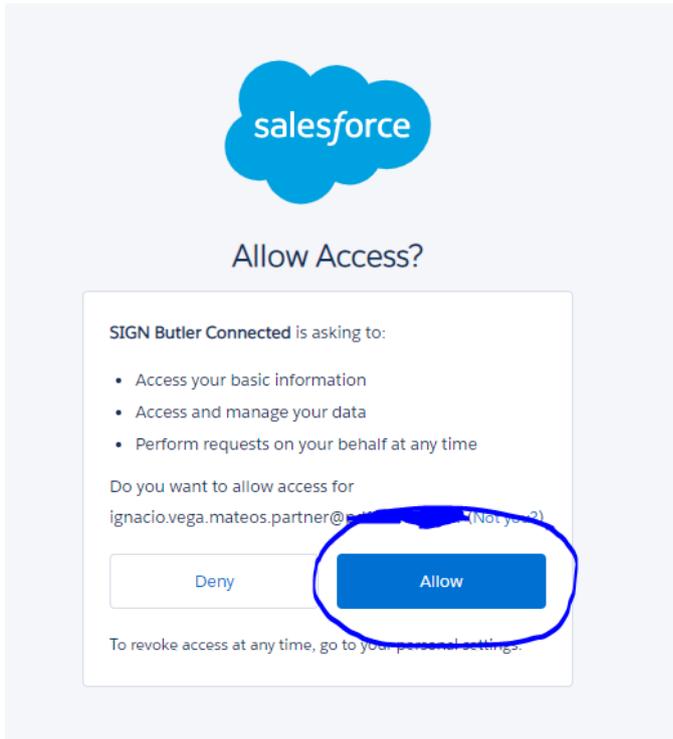
For a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses
Uninstall Manage Licenses	SIGN Butler	CloudCrossing - SIGN Butler V2	1.4	cadmus_sign2	Trial	10
Uninstall	Lightning Mass Delete	Mohit	1.0		N/A	N/A
Uninstall	BULK Butler	CloudCrossing	1.8	cadmus_batch	Free	N/A
Uninstall	PDF Butler	CloudCrossing	1.188	cadmus_core	Active	Unlimited
Uninstall Manage Licenses	SIGN Butler	SIGN Butler	1.62	cadmus_sign	Active	10
Uninstall	ISVapp	ISVapp GmbH	1.5.1	ia	Active	Unlimited
	License Management App	salesforce.com	1.20	sfLma	Active	Unlimited
	Description This is the app publishers use to track the different versions of managed packages and the licenses of subscribers who have installed them.					
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A
	Description This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...					
Uninstall	Salesforce and Chatter Apps	Salesforce.com	1.20	sf_chtr_apps	Active	Unlimited
	Description This package contains Connected Applications for the officially supported Salesforce apps for iOS and Android and Chatter applications on your desktop...					
Uninstall	Checkout Management App	Checkout Management App Packaging Org	1.13	sfoma	Active	Unlimited

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:

The screenshot shows the SIGN Butler Admin interface. The top navigation bar includes the SIGN Butler logo, a search icon, and several menu items: "SIGN Butler", "Sign requests", "Sign request templates", "Brandings", and "Admin". The "Admin" tab is highlighted. Below the navigation bar, the "Admin" section is displayed. Under the "Credentials" heading, there is a message: "Use your PDF Butler credential to link SIGN Butler to your account." Below this message are two input fields: "Username" with the value "pdfbutler_partner" and "Password" with a masked password. A "Check credentials" button is located below the input fields. Below the "Credentials" section, there is a "Batch Jobs" section with a "NOTIFY Batch Job" and a "CRON Expression" field.



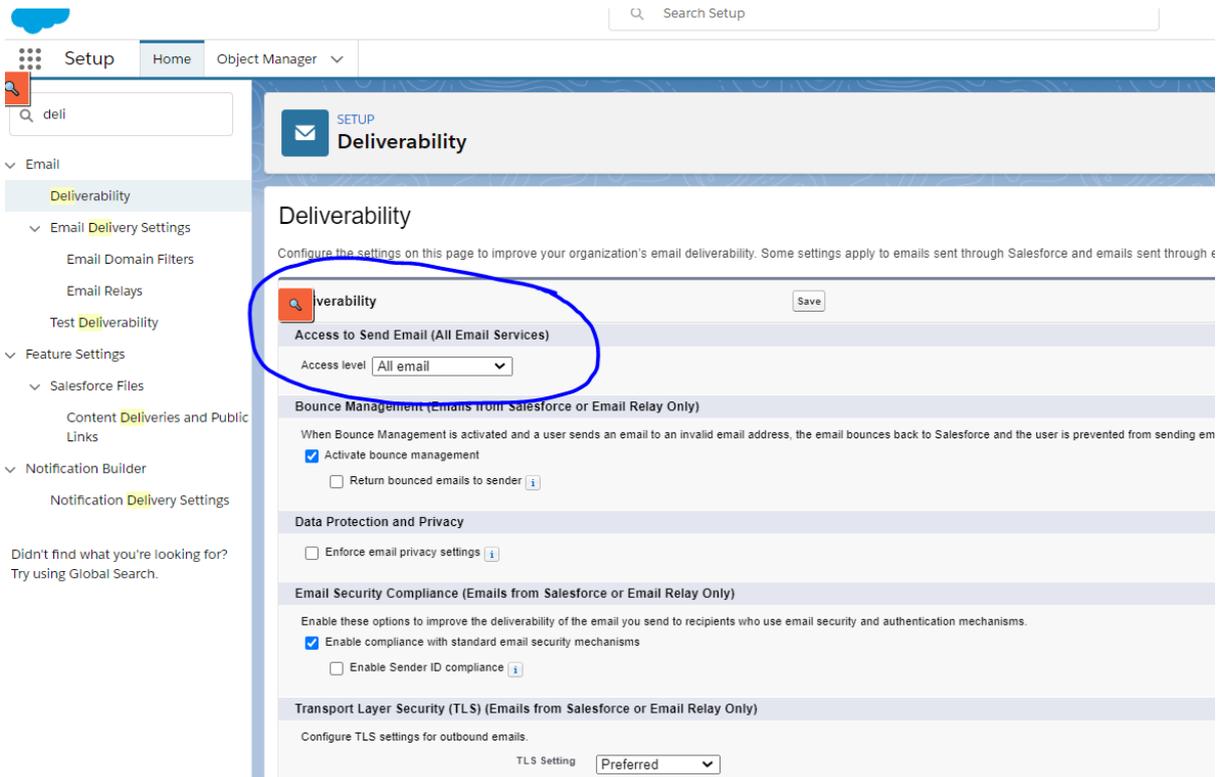
Congratulation



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

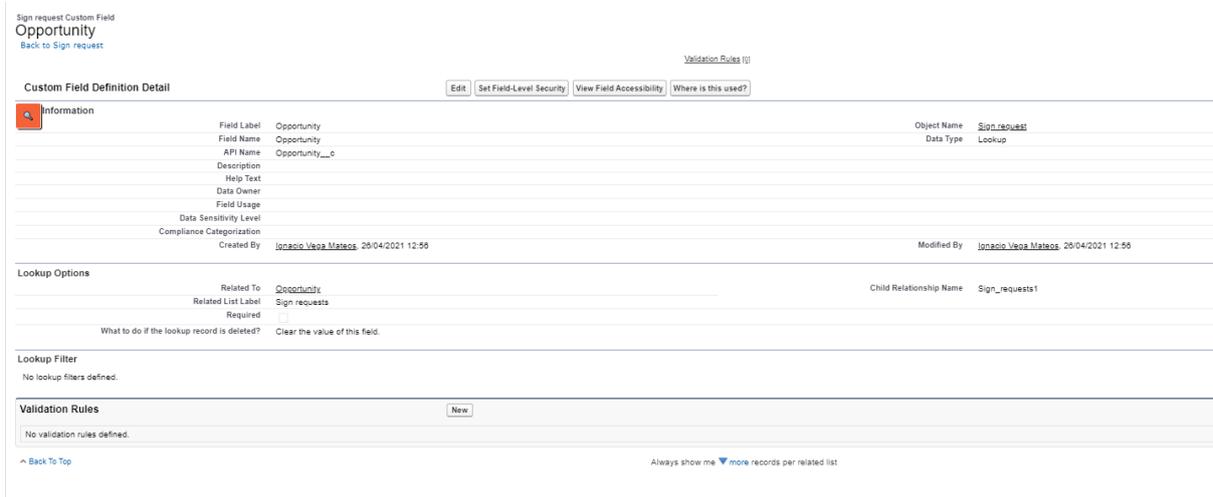
Close

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



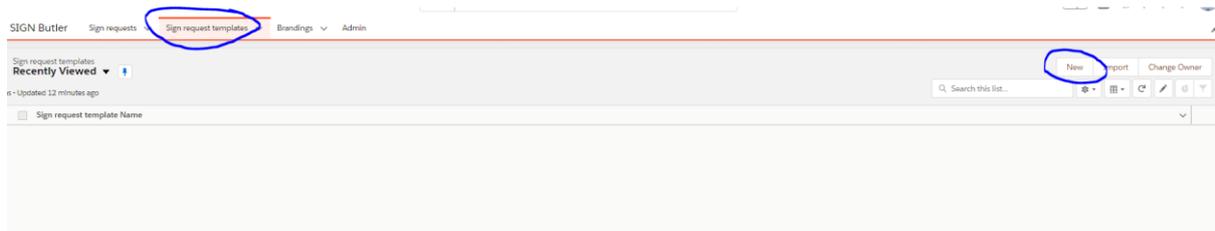
7. Create a lookup field in the object Sign Request:

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.

PDF Butler | Get Started | Data Sources | Doc Configs | Pdf Butler Admin | PDF Butler Packs | * Email Templates

Email Templates
All Folders > SignButlerEmails
35 Items

EMAIL TEMPLATES	Name	Description	Folder
Recent	signerMailOtp_es		SignButlerEmails
Created by Me	signerMailOtp_fr		SignButlerEmails
Private Email Templates	signerMailOtp_en		SignButlerEmails
Public Email Templates	signerMailOtp_de		SignButlerEmails
All Email Templates	signerRequestReminder_es		SignButlerEmails
	signerMailOtp_nl		SignButlerEmails
FOLDERS	signerRequestCreated_de		SignButlerEmails
All Folders	signerRequestCreated_en		SignButlerEmails
Created by Me	signerRequestReminder_en		SignButlerEmails
Shared with Me	signerRequestCreated_nl		SignButlerEmails
	signerRequestDownload_de		SignButlerEmails
	signerRequestDownload_en		SignButlerEmails
	signerRequestDownload_es		SignButlerEmails
	signerRequestDownload_fr		SignButlerEmails
	signerRequestDownload_nl		SignButlerEmails

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

Email Templates
All Folders > SignButlerEmails
35 Items

EMAIL TEMPLATES	Name	Description	Folder	Last Modified
Recent	signerMailOtp_es			
Created by Me	signerMailOtp_fr			
Private Email Templates	signerMailOtp_en			
Public Email Templates	signerMailOtp_de			
All Email Templates	signerRequestReminder_es			
	signerMailOtp_nl			
FOLDERS	signerRequestCreated_de			
All Folders	signerRequestCreated_en			
Created by Me	signerRequestReminder_en			
Shared with Me	signerRequestCreated_nl			
	signerRequestDownload_de			
	signerRequestDownload_en			
	signerRequestDownload_es			
	signerRequestDownload_fr			
	signerRequestDownload_nl			
	signerRequestExpired_de			
	signerRequestExpired_nl			
	signerRequestExpired_en			
	signerRequestExpired_es			

Share folder

These sharing settings apply to all subfolders in this folder.

Share With: Public Groups

Names: Search Public Groups... Access: View

Share

Who Can Access

Ignacio Vega Mateos Manage

Done

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

Template definition

Sign request template

* Request template name ⓘ

* Select master object ⓘ

Select PDF Butler DataSource ⓘ

SIGN Butler Opp Contact ✕

* master object field for sign request name ⓘ

Branding

allow download of unsigned documents Active

extra email merge fields datasource ⓘ

Translation Data Source ⓘ

Sender Settings

use default FROM Active

use Static OWA Inactive

Email Template prefix ⓘ

Expiry

You can let field empty If It doesn't apply.

Enable datasource for expiry date Inactive

Number of day to wait before reminders

Frequency of reminders in days

Number of day before expiration

Number of day before expiration warning

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.

The screenshot shows the 'Stakeholders' configuration form. At the top, there is a progress bar with a checkmark and the label 'Stakeholders'. Below the progress bar, the form includes a 'Role' dropdown menu set to 'Signer'. Under the heading '*Signature methods', there are three checked options: 'Scribble', 'Handwritten', and 'MailOTP'. A 'Data source' dropdown is set to 'SIGN Butler C'. The form contains several input fields: '*Id' (Primary_Contact_Id), '*First name' (Primary_Contact_FirstName), '*Last name' (Primary_Contact_LastName), '*Email' (Primary_Contact_Email), and '*Language' (Not mapped: Use English). An 'Add' button is located at the bottom right of the form.

Click on Next once you have added all the stakeholders:

This screenshot shows the 'Stakeholder' list below the configuration form. The list has columns for Order, Role, Data source, Email, First name, Last name, Id, and Language. One stakeholder is listed with the role 'Signer' and data source 'SIGN Butler Opp Contact'. The 'Next' button is circled in blue. The 'Add' button from the previous form is also visible above the list.

Order	Role	Data source	Email	First name	Last name	Id	Language
1	Signer	SIGN Butler Opp Contact	Primary_Contact_Email	Primary_Contact_FirstName	Primary_Contact_LastName	Primary_Contact_Id	En

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

The screenshot shows the 'File mapping' configuration screen. At the top, there is a progress bar with two checkmarks and the label 'Mappings'. Below the progress bar, the screen has a heading 'File mapping' and a sub-heading 'How to save your document when signed?'. There is an 'Attach' dropdown menu with 'File' selected. Below this, there is a question: 'Looking to change status on your master object when document status changes?' and a link: 'Create your flow, process or trigger to fully capture the power of eForms!'. At the bottom, there are 'Previous' and 'Submit' buttons.

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.

Edit Sign Contract v2

<p>* Actionable Name <input type="text" value="Sign Contract v2"/></p>	<p>Record Type SIGN Butler</p>
<p>Doc Config <input type="text" value="Search Doc Configs..."/></p>	<p>Owner Ignacio Vega Mateos</p>
<p>* Class <input type="text" value="Actionable_SignButlerSilent"/></p>	
<p>* When <input type="text" value="AFTER"/></p>	
<p>Active <input checked="" type="checkbox"/></p>	↻
<p>Pack <input type="text" value="Sign Contract"/></p>	

Sign Butler

* Sign Request Template

Created By
 Ignacio Vega Mateos, 26/04/2021 16:38

Last Modified By
 Ignacio Vega Mateos, 26/04/2021 16:38

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
<u>[[!PROD_NAME!]]</u>	<u>[[!PROD_QUANTITY!]]</u>	<u>[[!PROD_TOTAL_PRICE!]]</u>
Total:		<u>[[!OPP_AMOUNT!]]</u>

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.

Analyze Activation... Save

Page > LC_PreviewComponent

DocConfig to retrieve
a0509000001S0TzAAK

Packs to retrieve
a0709000001w5F9AAM

Run the DocConfigs of the Pack

deliverytype Overwrite
NONE

Locale required?

API name of the field to use as locale.

Currency locale required?

API name of the field to use as currency locale.

Alternatives enabled?

Follow Quick Action Component PDF Butler BUtton Mass Volume

Negotiation/R... Closed Mark Stage as Complete

PDF Butler Document Previewer

TEMPLATE	FORMAT
Parallel Signers	PDF

Hello

TEMPLATE	FORMAT
Training Evo	PDF DOCX
Training Evo 2	PDF DOCX

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.

Please sign your document with name Opportunity for Abbott1184 Inbox x

via 7awbcgkfbj2zzt5.z3lxo.2w-dnks8eal.ap16.bnc.salesforce.com 1:59 PM (0 minutes ago)

to me

SIGN BUTLER

Hi,

has a document for you to validate and sign.

SIGN DOCUMENT

Regards,