

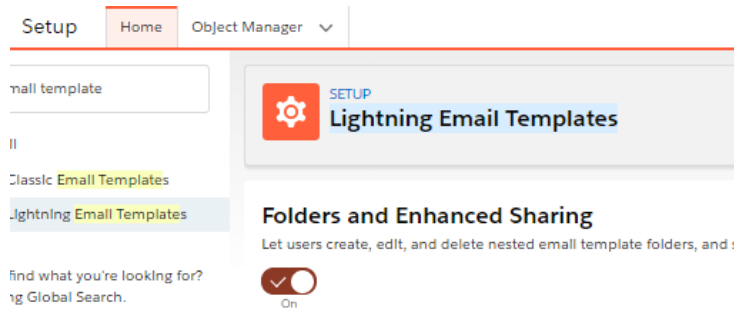
CloudCrossing BVBA
Dahlialaan 1
2950 Kapellen
Belgium



SIGN Butler V2

In order to configure the New Sign Butler, you need to follow the below steps:

1. You need to enable Folders and Enhanced Sharing in Setup/Email/ Lightning Email Templates

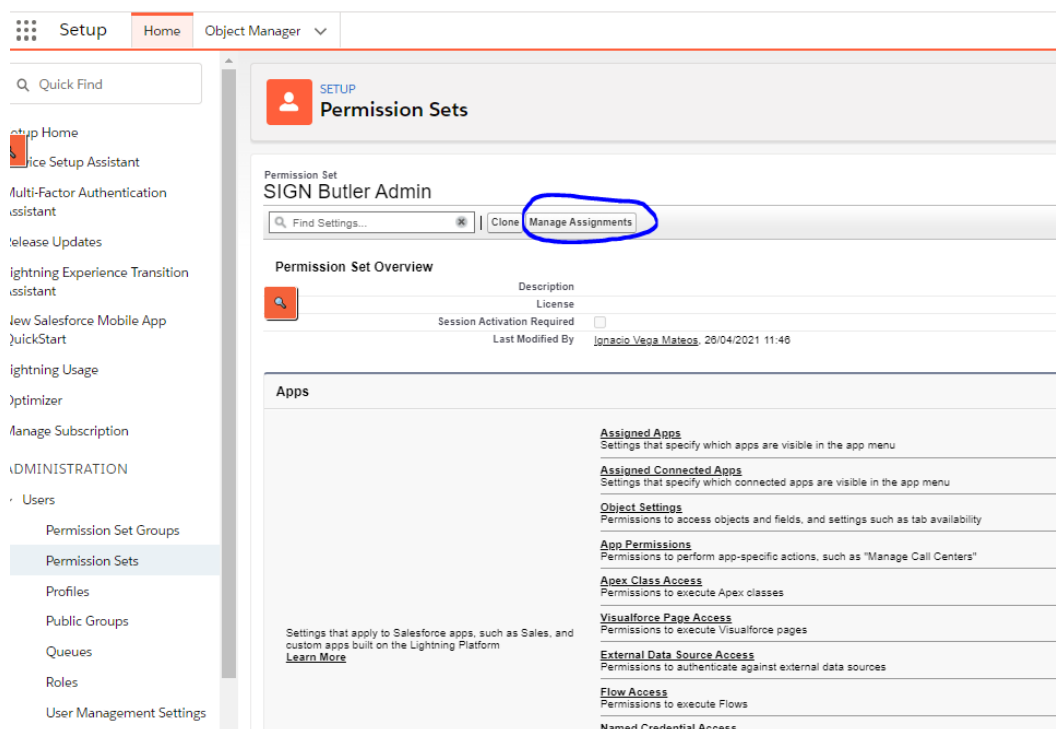


2. Install SIGN Butler.

Use this Url to install it: /packaging/installPackage.apexp?p0=04t090000003NbV

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:



Home Object Manager

SETUP
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	[REDACTED]	26/04/2021 12:00
<input type="checkbox"/> Edit	Vandemeirsch, Andy	avand	[REDACTED]	26/04/2021 9:29
<input type="checkbox"/> Edit	Vega Mateos, Ignacio	Ivega	[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:

SETUP
Installed Packages

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.

Installed Packages

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
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A
Uninstall	Salesforce and Chatter Apps	Salesforce.com	1.20	sf_chtr_apps	Active	Unlimited
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. At the top, there is a navigation bar with the SIGN Butler logo and several menu items: 'SIGN Butler', 'Sign requests', 'Sign request templates', 'Brandings', and 'Admin'. The 'Admin' tab is highlighted. Below the navigation bar, there is a header with a wrench icon and the word 'Admin'. The main content area is titled 'Credentials' and contains the following text: 'Use your PDF Butler credential to link SIGN Butler to your account.' Below this text 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.

The screenshot shows a Salesforce 'Allow Access?' dialog box. At the top, there is the Salesforce logo. Below the logo, the text 'Allow Access?' is displayed. The dialog box contains the following text: 'SIGN Butler Connected is asking to:' followed by a list of permissions: 'Access your basic information', 'Access and manage your data', and 'Perform requests on your behalf at any time'. Below the list, the text 'Do you want to allow access for' is followed by the email address 'ignacio.vega.mateos.partner@pdfbutler.com' and the name 'ignacio.vega.mateos.partner' (Nov 21, 2021). Below the text are two buttons: 'Deny' and 'Allow'. The 'Allow' button is highlighted. Below the buttons, the text 'To revoke access at any time, go to your personal settings.' is displayed.

Congratulation



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

Close

6. Make sure you have selected All Email in the field Access Level from Setup/Email/Deliverability:

A screenshot of the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Deliverability' and contains several sections. The 'Access to Send Email (All Email Services)' section is highlighted with a blue circle, and the 'Access level' dropdown menu is set to 'All email'. Other sections include 'Bounce Management (Emails from Salesforce or Email Relay Only)', 'Data Protection and Privacy', 'Email Security Compliance (Emails from Salesforce or Email Relay Only)', and 'Transport Layer Security (TLS) (Emails from Salesforce or Email Relay Only)'. The 'Save' button is visible in the top right of the main content area.

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:

Sign request Custom Field
Opportunity
Back to Sign request

Validation Rules (0)

Custom Field Definition Detail

[Edit](#) | [Set Field-Level Security](#) | [View Field Accessibility](#) | [Where is this used?](#)

Information		Field Label	Opportunity	Object Name	Sign_request
		Field Name	Opportunity	Data Type	Lookup
		API Name	Opportunity__c		
		Description			
		Help Text			
		Data Owner			
		Field Usage			
		Data Sensitivity Level			
		Compliance Categorization			
		Created By	Janacio Vega Mateos, 28/04/2021 12:58	Modified By	Janacio Vega Mateos, 28/04/2021 12:58

Lookup Options

Related To: [Opportunity](#) | Child Relationship Name: Sign_requests1
 Related List Label: Sign_requests
 Required:
 What to do if the lookup record is deleted?: Clear the value of this field.

Lookup Filter

No lookup filters defined.

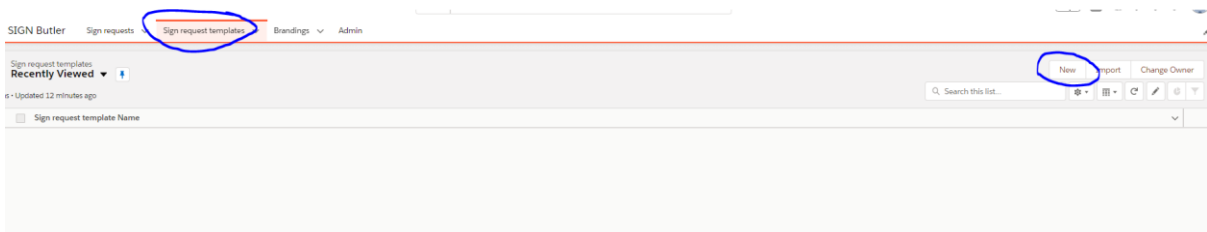
Validation Rules [New](#)

No validation rules defined.

[Back To Top](#) Always show me [more](#) records per related list

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.

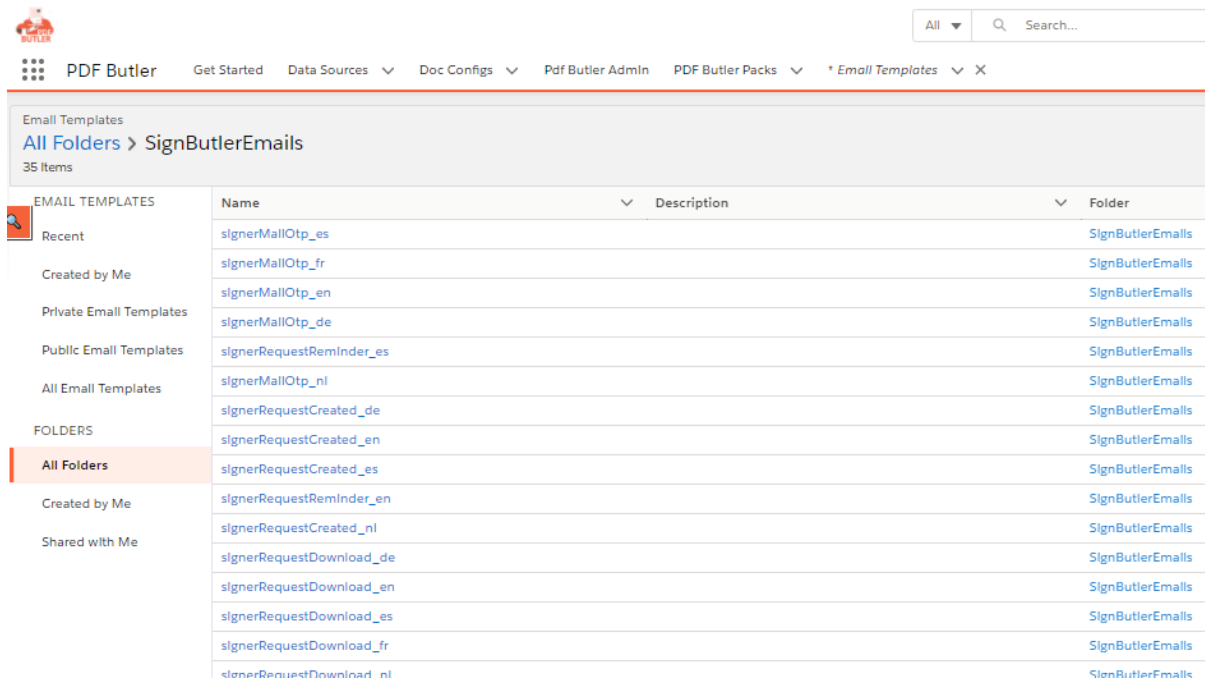
allow download of unsigned documents: This will allow the signer to download the document before signing it.

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.

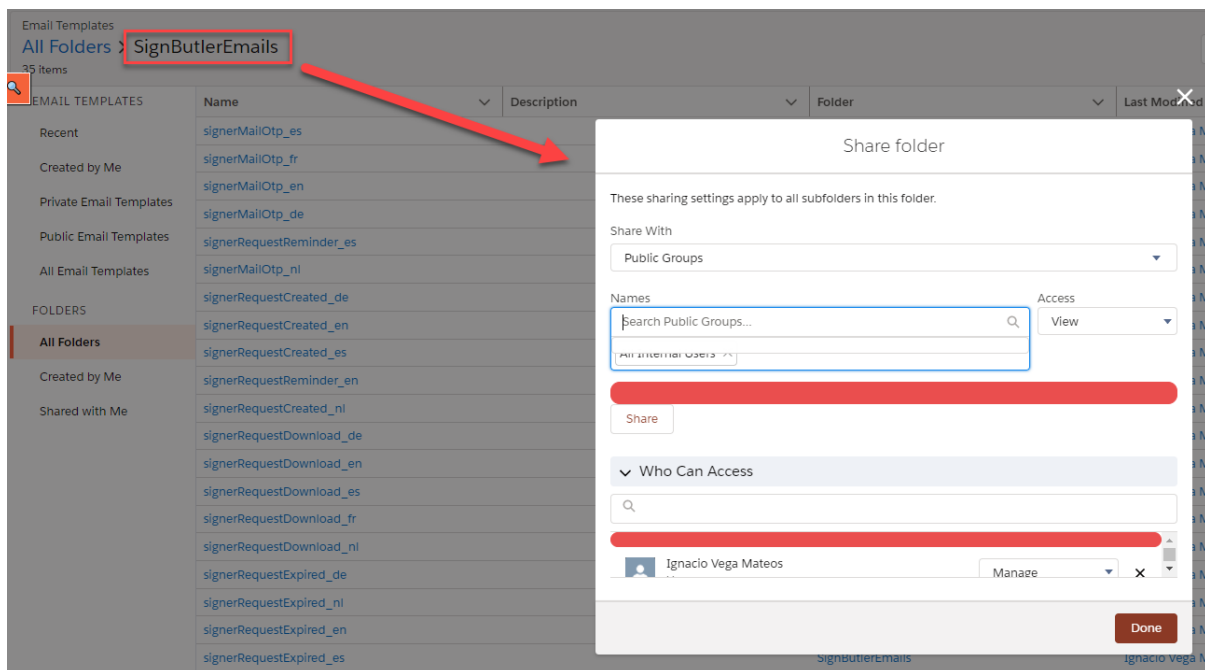
use *Static OWA*: If you want to send the email from a specific email address, you can use this option.

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.

Template definition

Sign request template

* Request template name ⓘ

* Select master object ⓘ

Select PDF Butler DataSource ⓘ

* 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 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 it, the 'Role' is set to 'Signer'. Under '*Signature methods', 'Scribble', 'Handwritten', and 'MailOTP' are checked. The '*Data source' is set to 'SIGN Butler Contact'. The form includes several dropdown menus: '*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.

Click on Next once you have added all the stakeholders:

This screenshot shows the configuration form from the previous step, with the 'Add' button highlighted. Below the form is a table titled 'Stakeholder' with the following columns: Order, Role, Data source, Email, First name, Last name, Id, and Language. The table contains one entry with the following values: Order 1, Role Signer, Data source SIGN Butler Opp Contact, Email Primary_Contact_Email, First name Primary_Contact_FirstName, Last name Primary_Contact_LastName, Id Primary_Contact_Id, and Language En. The 'Next' button is circled in blue.

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

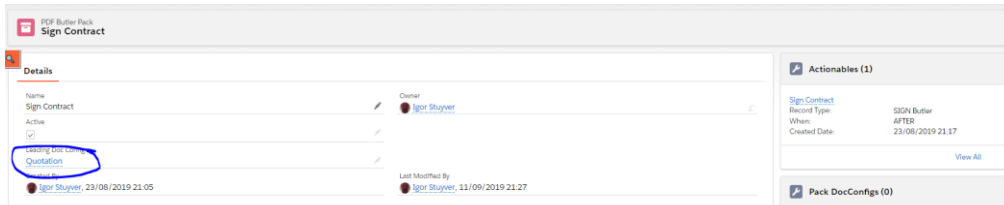
Then you need to select where the signed file will be saved. In this case I will select Files:

The screenshot shows the 'File mapping' configuration form in the SIGN Butler interface. The navigation bar includes 'SIGN Butler', 'Sign requests', 'Sign request templates', 'Brandings', and 'Admin'. The progress bar shows two steps, with the second step 'Mappings' active. The 'File mapping' section has an 'Attach' dropdown menu with 'File' selected. Below it, there is a text area with instructions: 'Looking to change status on your master object when document status changes? Create your flow, process or trigger to fully capture the power of the tool! Trail: Build Flows with Power Automate'. 'Previous' and 'Submit' buttons are at the bottom.

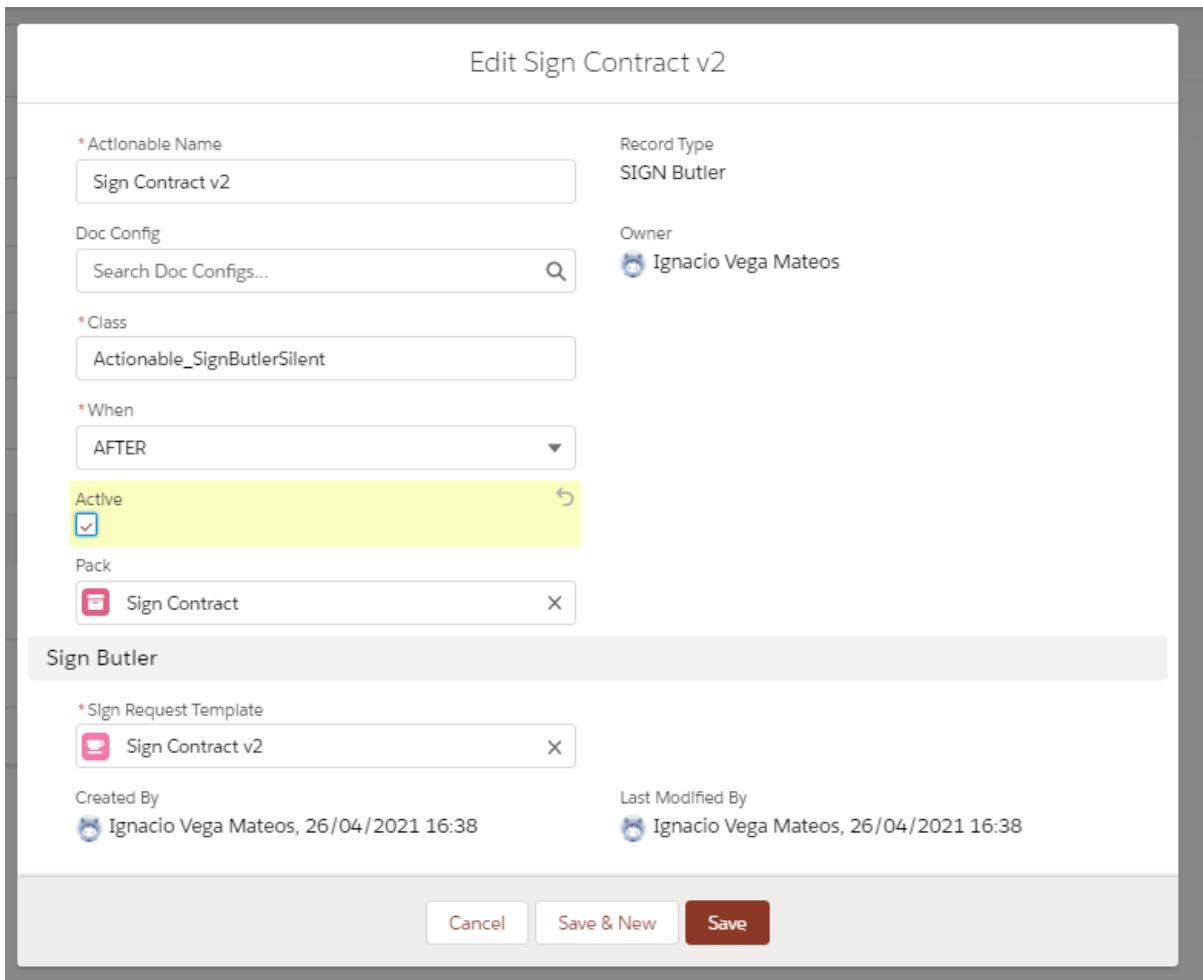
Click on Submit to save it.

9. Create a Pack and an actionable:

You need to create a Pack and then add the Sign Butler actionable. Create a new Pack where the leading Doc Config will be the one with the signing tags, do not forget to activate the pack:



Then create the SIGN Butler Actionable:



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

Class: The class will be: 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 picture to it. I will attach in the email the picture you need to use, I will add 2 pictures in case you have 2 signers. Just add the picture to the template.

11. Add the Previewer component to the lightning page.

Go to one of the opportunity records and add the Previewer component. In the component add the Leading Doc Config you are using in the pack id and also the pack id and save it. Once you have done it , you should be able to run the document:

The screenshot displays the Salesforce Lightning interface for configuring a PDF Butler Document Previewer component. The main window shows the component configuration with two document entries:

TEMPLATE	FORMAT
Parallel Signers	PDF
Training Evo	PDF DOCX
Training Evo 2	PDF DOCX

Below the configuration, a "Hello" message is displayed. To the right, the configuration settings for the component are shown:

- Page > LC_PreviewComponent
- DocConfig to retrieve: a0509000001S0TzAAK
- Packs to retrieve: a0709000001wSF9AAM
- 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?