Signaturit
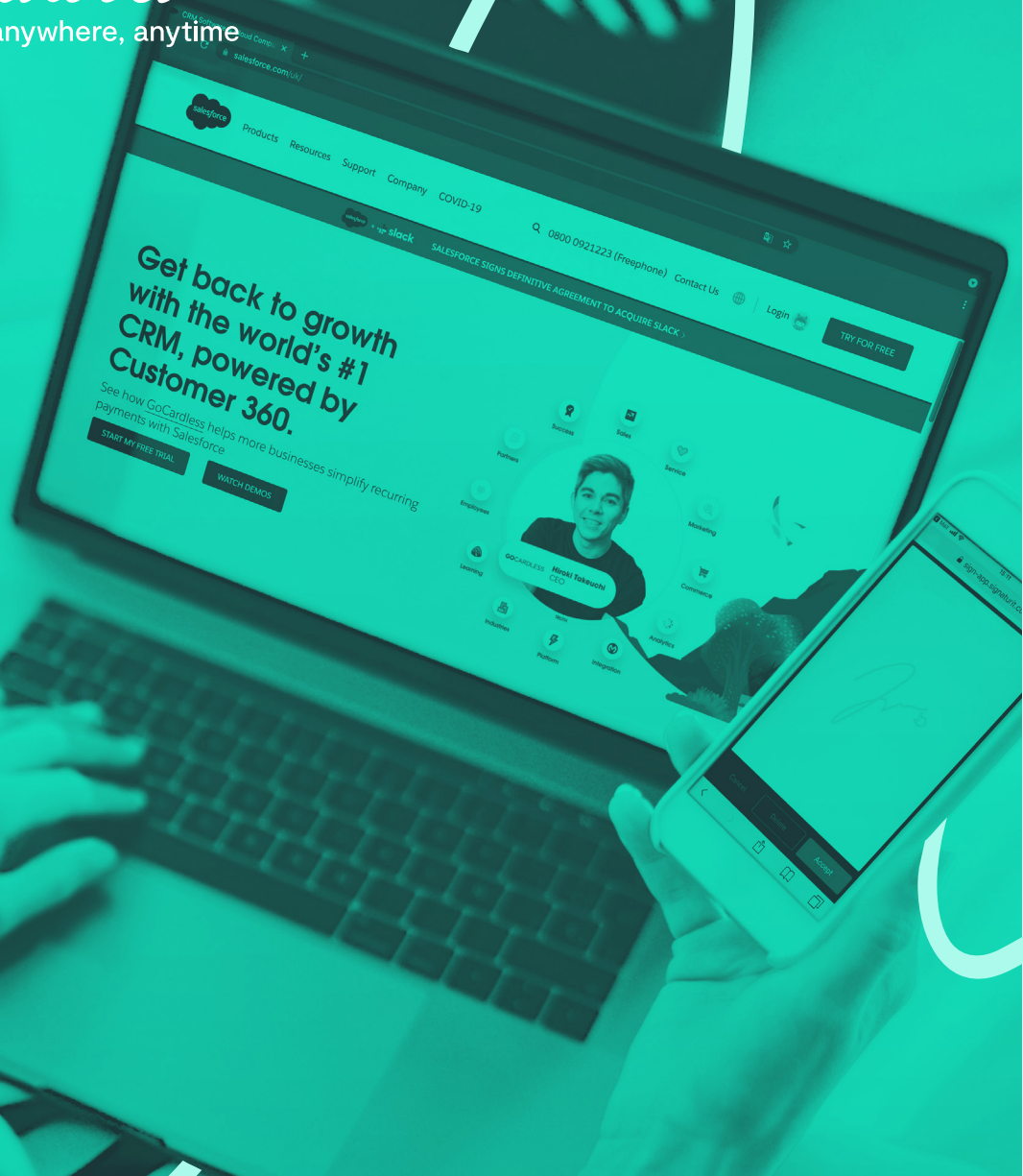
Sign anywhere, anytime

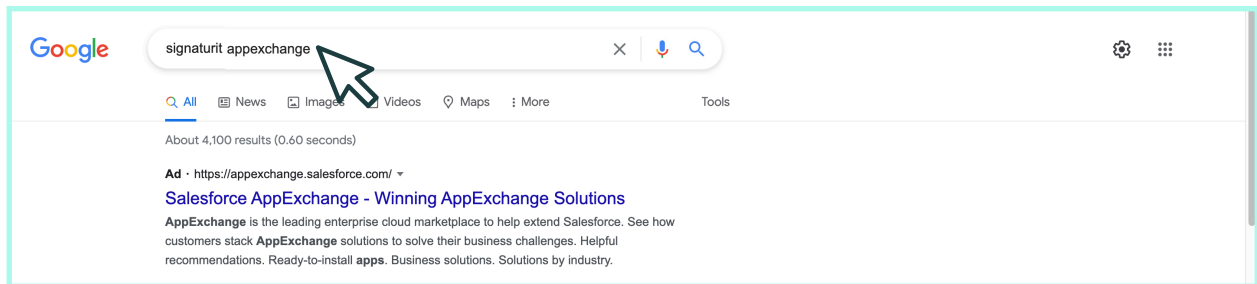# How to integrate Signaturit's electronic signature in Salesforce
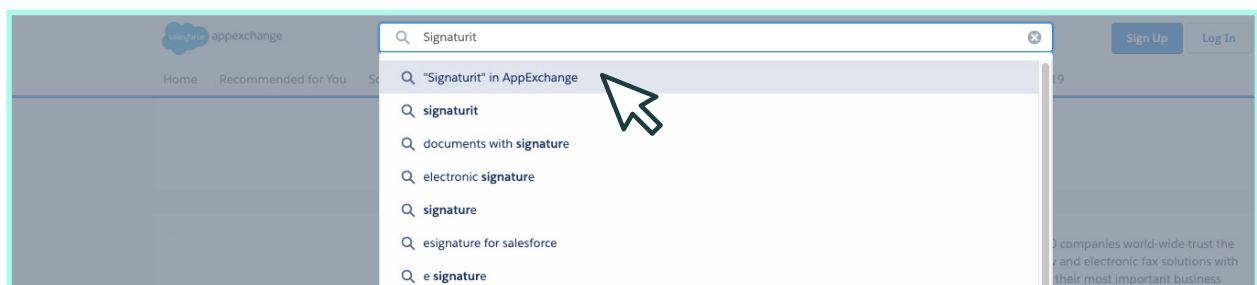
ÍNDICE

01.

Plugin installation

1. You have two options for downloading the plugin:

A) The first, search "Signaturit App Exchange" on Google

B) The second, access it from Salesforce here and search for "Signaturit"
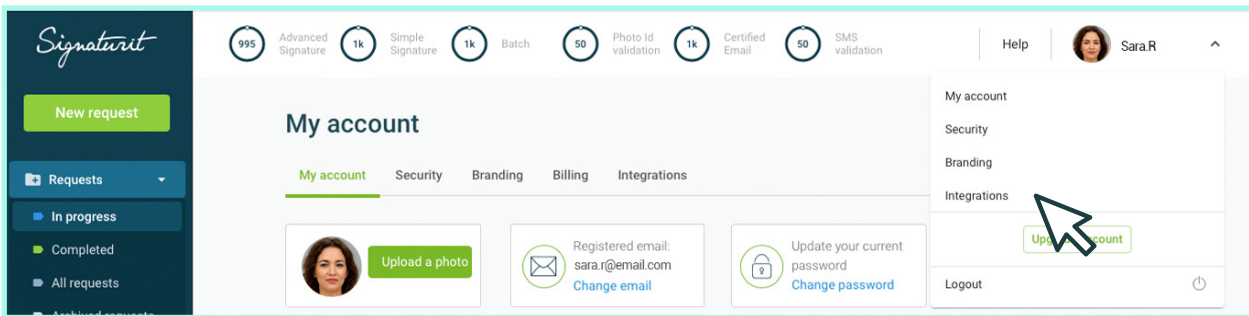

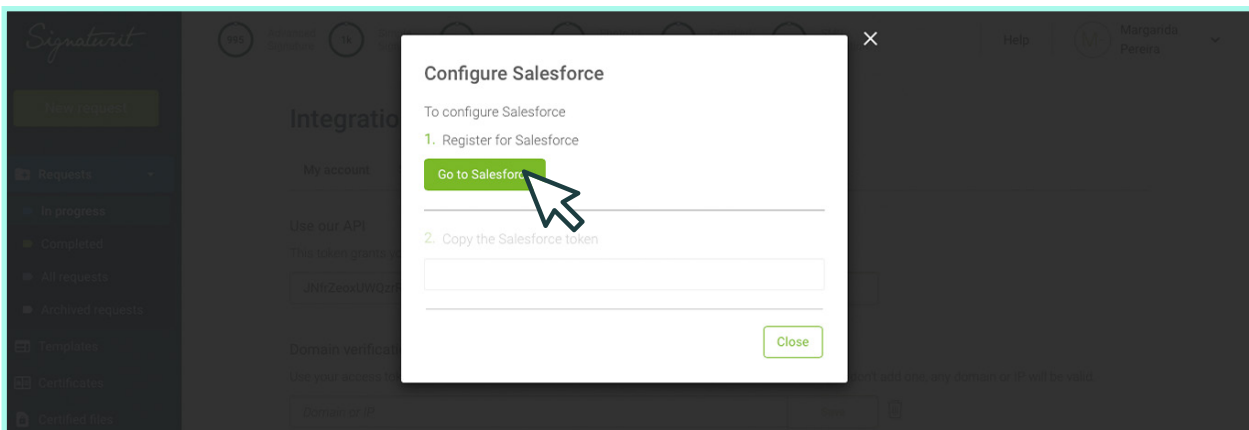### 2. Enter and click "Get It Now" to begin the installation
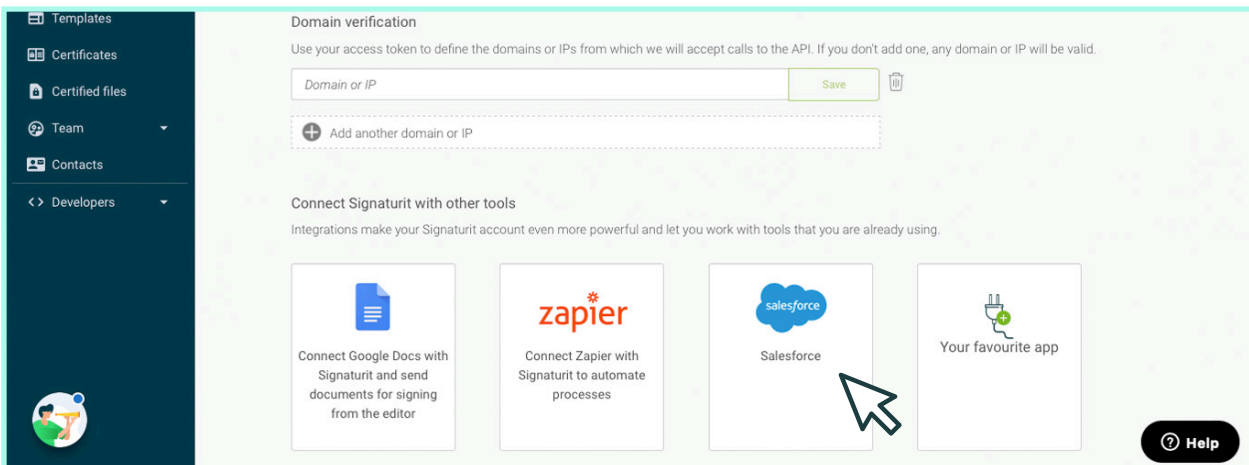
02.
Get the Signaturit Salesforce token

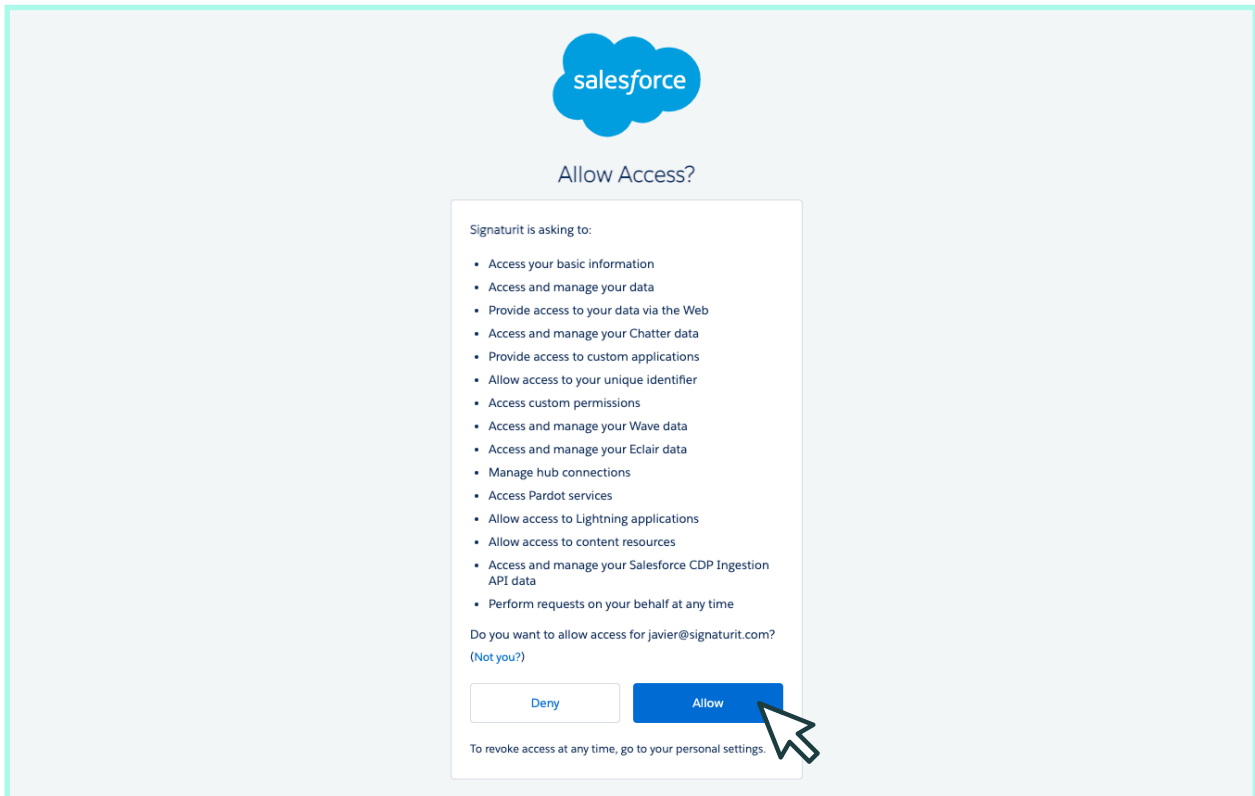## 1. Enter your Signaturit account and search "Integrations"

You can find it in this section by clicking on your avatar icon in the **upper right-hand corner of the screen.**
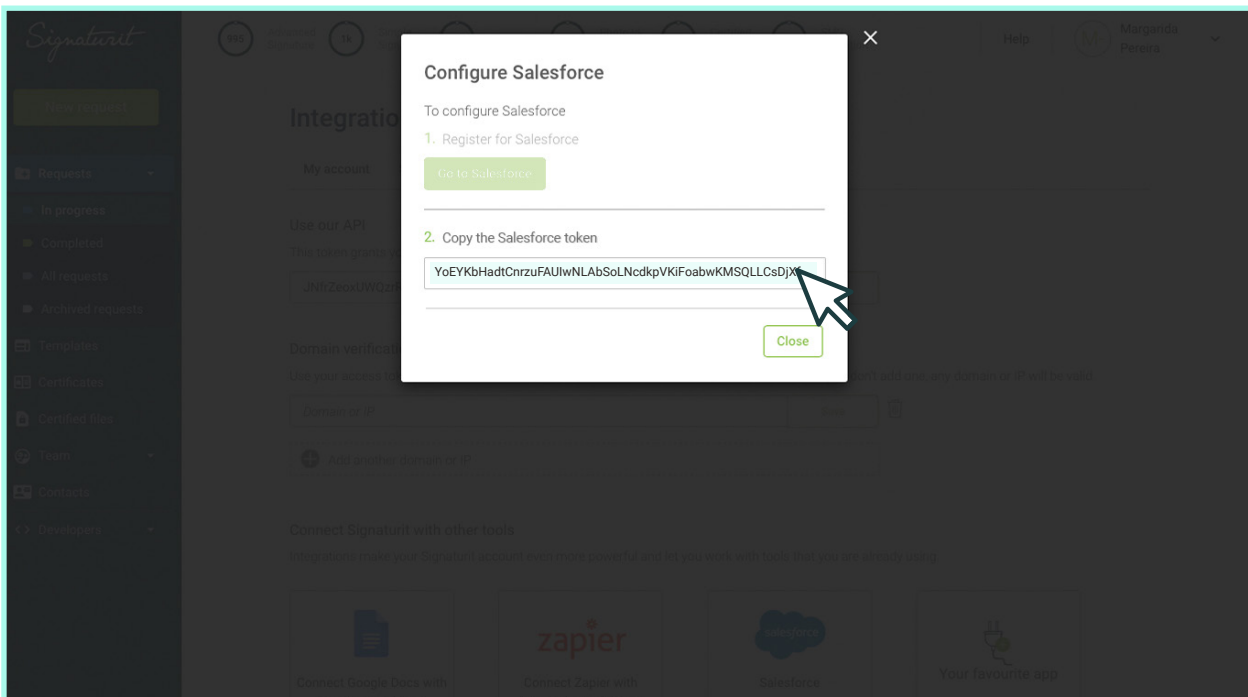

2. Click on the Salesforce icon and "Go to Salesforce"

3. Click on "Allow" to agree to connecting the tools

4. Connect to Salesforce and the token will appear
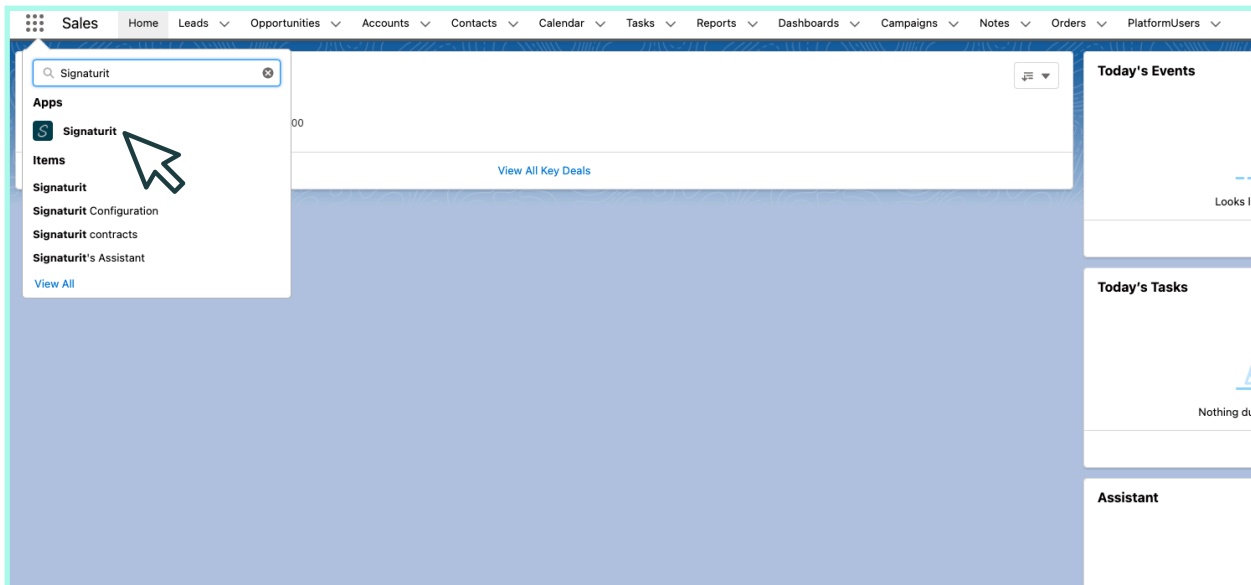
03.

Add the token to your Salesforce account

1. Enter your Salesforce account and search for the app

Access the application shortcuts in the Left menu (⠿). **Type in "Signaturit" and launch the application.**

2. Access "Configuration" and add your token

This is the token configuration screen. You have two options:

1. Enable a single token for your Salesforce organization

2. Use tokens at a user level.

If you enable a single global token, your signature credit consumption will be reflected in a single signaturit account for your Salesforce org. Otherwise, user-level tokens allow you to use different Signaturit accounts for each Salesforce user. If you prefer this last option, click on "User-level tokens".

Remember that if you use a Signaturit Sandbox token for testing, you must activate the "Use Signaturit Sandbox" button.

Now, it's time to enter the previously copied token. To check that the configuration is correct you have to click 2 times: The first one, on "Check" to validate that the token is correct, and the second one on "Done" to save it. It is very important that you also click on "Done" to complete the configuration process correcty.
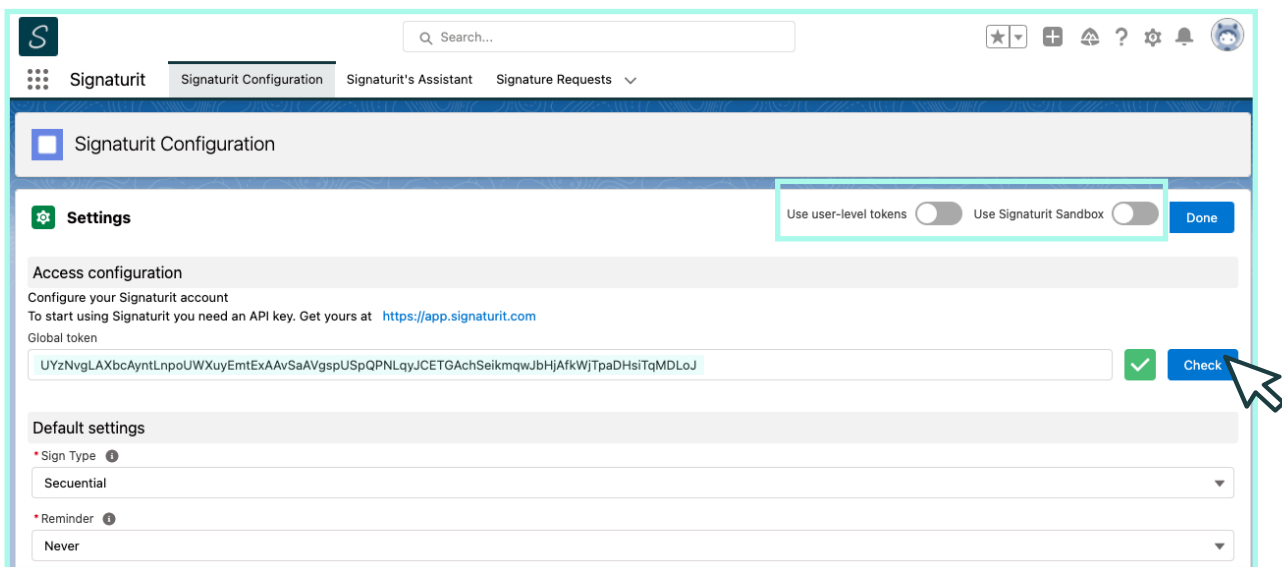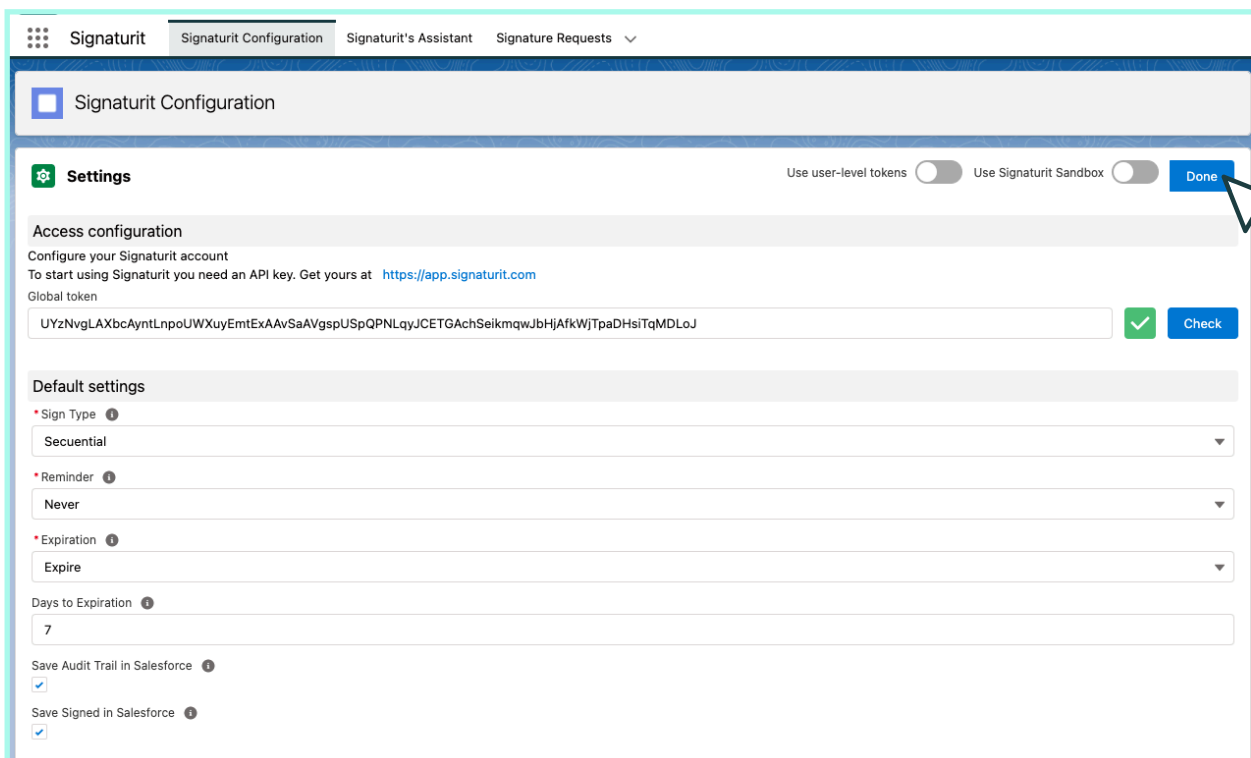
3. Now, configure the predetermined actions

These configurations are predetermined, but **you can select a different one for each signing request.**
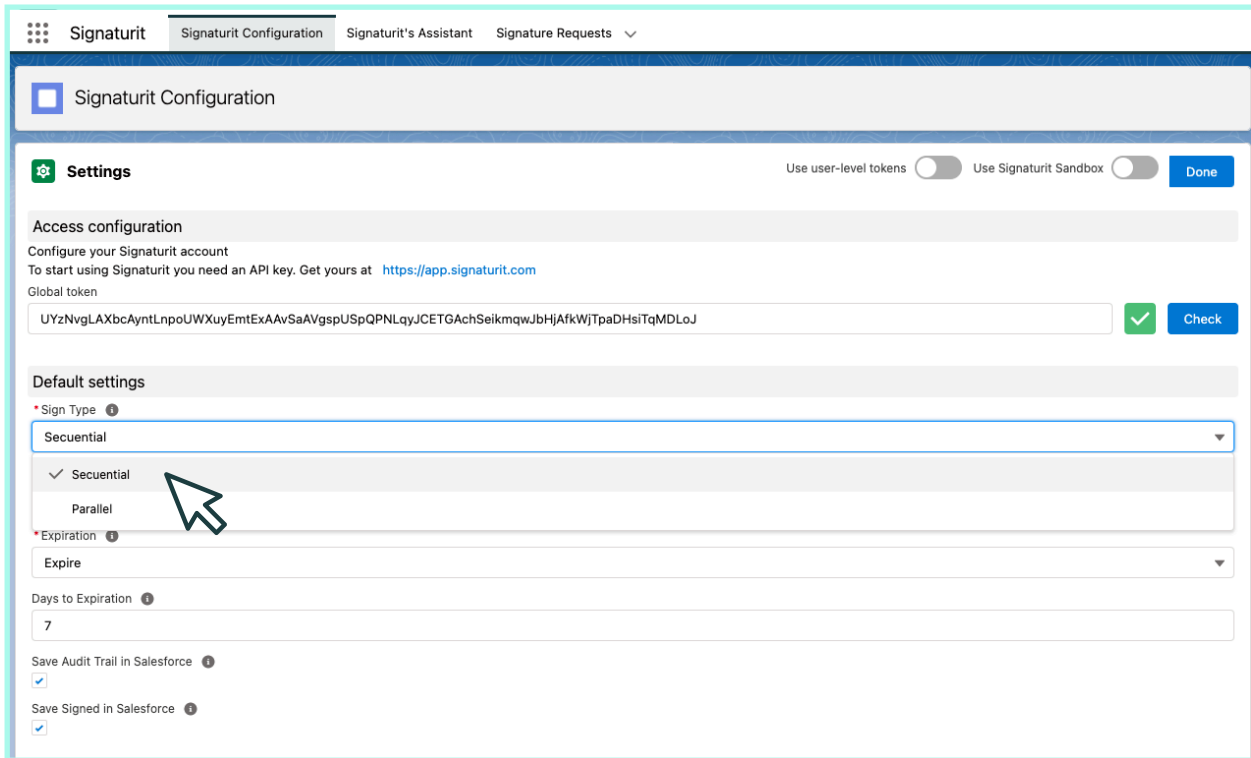
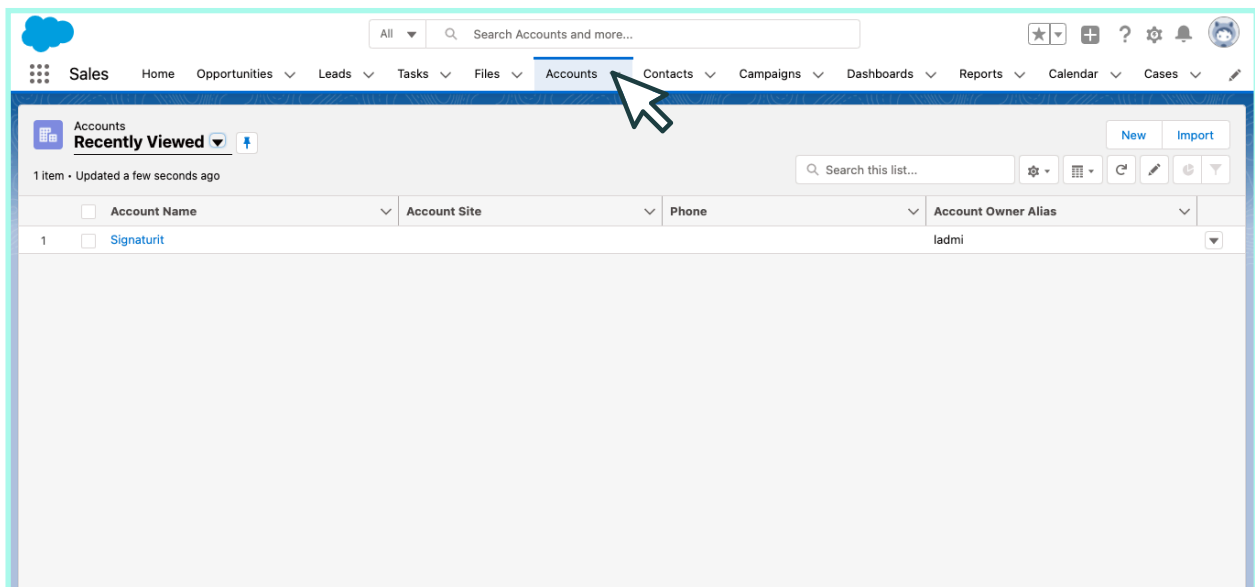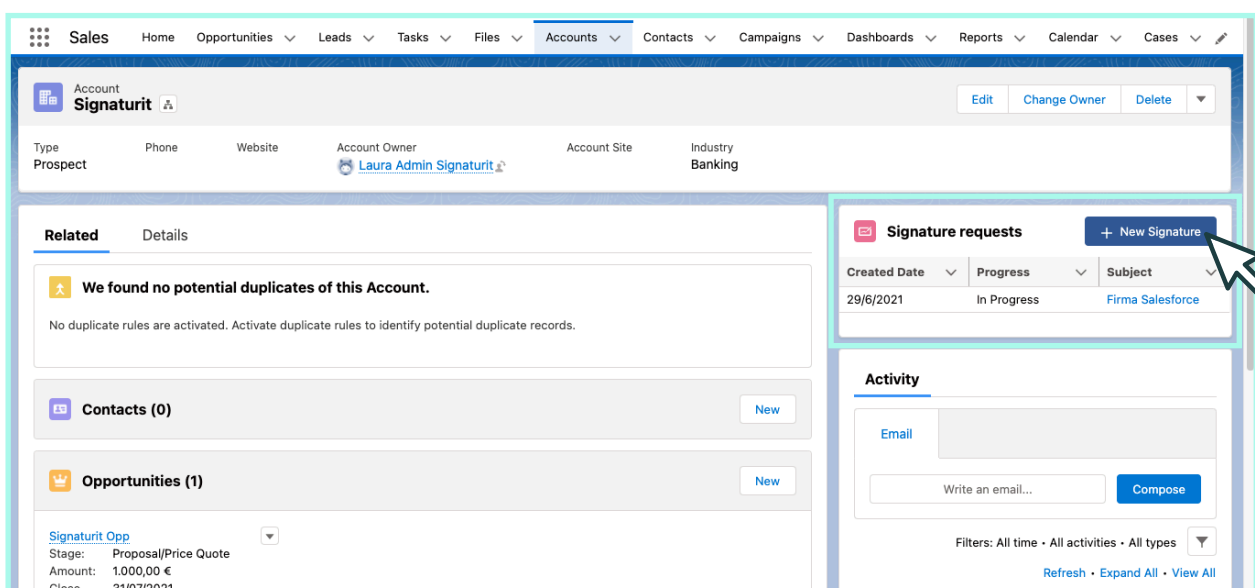# 4. Once it is configured, click "Done"

04.

Send a document to sign through Salesforce

1. Perform a signature from any Salesforce object

The object can be personalised or not. In this case, access the **"Accounts"** so that the signature log remains connected to this specific account.
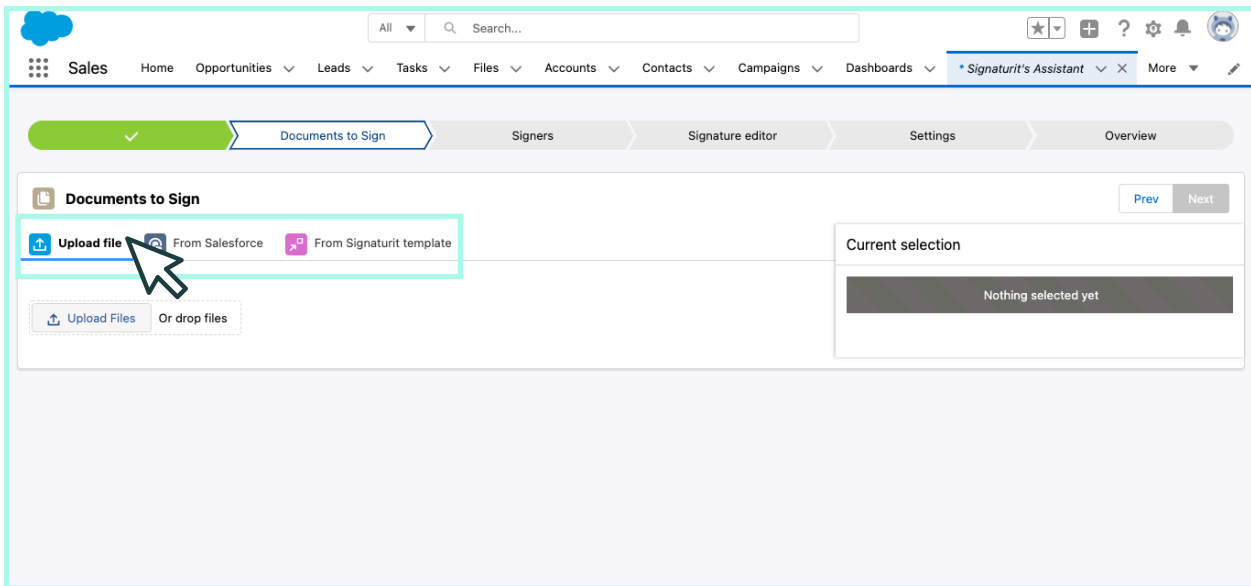

2. In the "signature requests" panel, click on "New Signature"

# 3. Select the documents that you want to send for signing

You have the following options and you can combine them however you like, **up to a maximum of 15 documents:**

- ✓ Choose a **Signaturit template**

- ✓ Select a **PDF document** saved in Salesforce

- ✓ Add a **document from your device**

4. Select the signatories to whom the document will be sent

You can either use Salesforce or external objects. You can also choose different roles if you need someone to validate the documentation. **Signaturit allows you to send to up to 40 signatories and validators.**
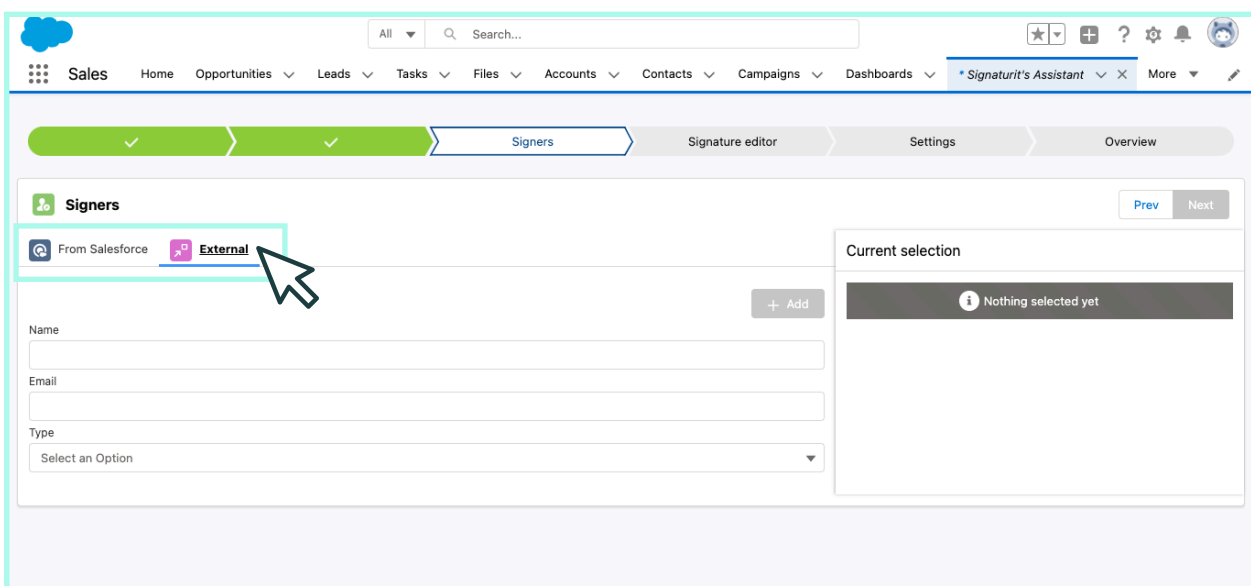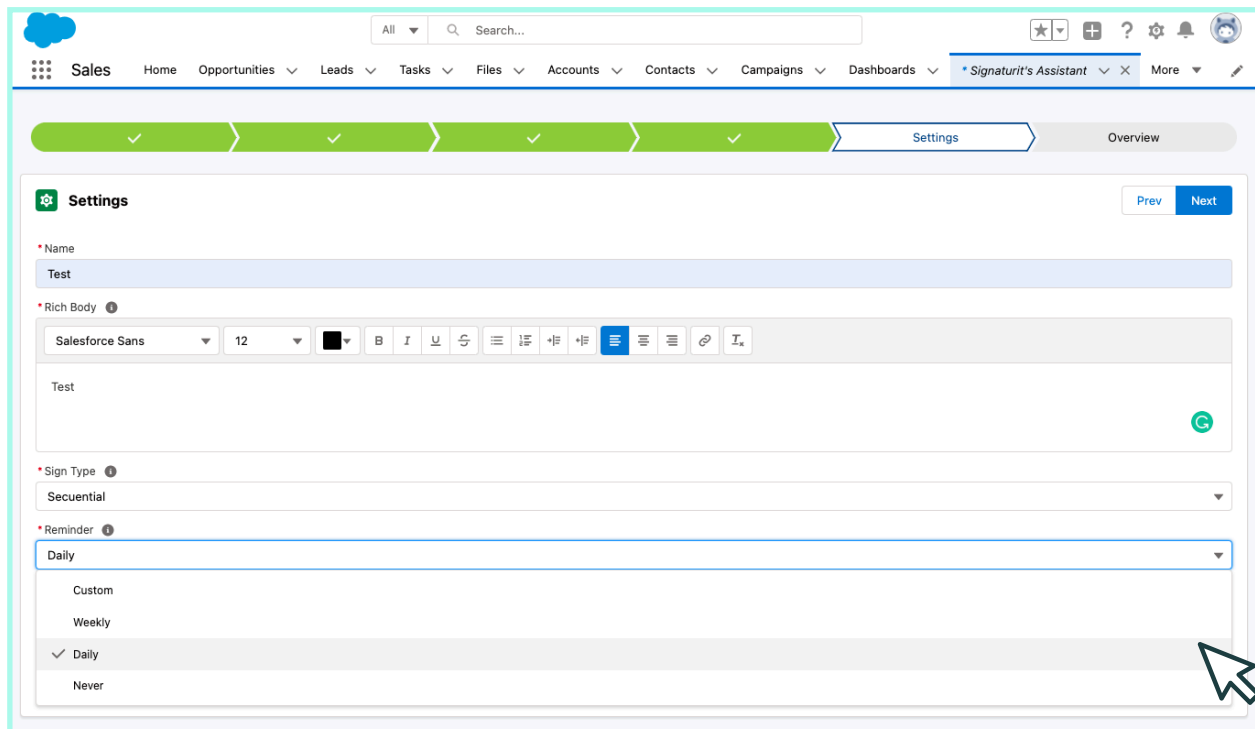
5. Configure the document with the editor

Once you have all the information, move on to the document editor. Here, **select each signatory and drag the widget** to where you want the signature to be.
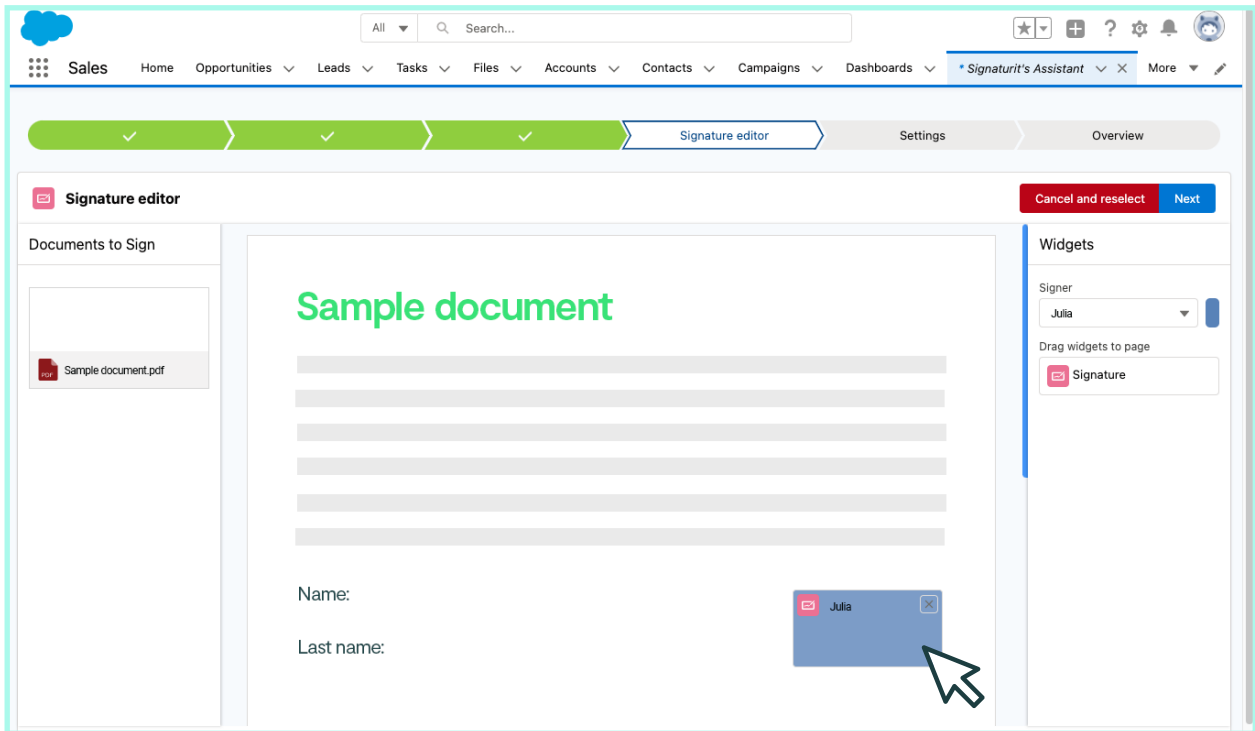
6. Now, personalise the email they will receive

Now, you can personalise the email that the signatories will receive and **create reminders** for them to sign.

7. Choose between sequential or parallel sending

If you want the, all to **receive the document at the same time,** select "parallel" If, on the other hand, you want to **control the order of receipt,** select "sequential".

8. Review and send the document to be signed

Make sure that the documentation is exactly how you want it before sending it out to be signed. To send, click **"Send"** to execute the request. Ready! It will soon be signed.

9. Follow up on the status of the signing process

You can review your **request's status in real time,** and once the process is complete, you can download your Audit trail or substantiating document. This document logs all electronic evidence generated during the signing process.

You can also generate reports about the status and duration of your signing requests.

Signaturit
Sign anywhere, anytime

Try our electronic signing solution in Salesforce for **FREE** for **7 days**!

1. Create an account with Signaturit

2. Download the plugin in Salesforce

3. Send out your first document to be signed

salesforce

MANUEL AMAT
To: maria@signaturit.com

Request to sign the file with Signaturit

Signaturit

Open document

Sign here:

Send
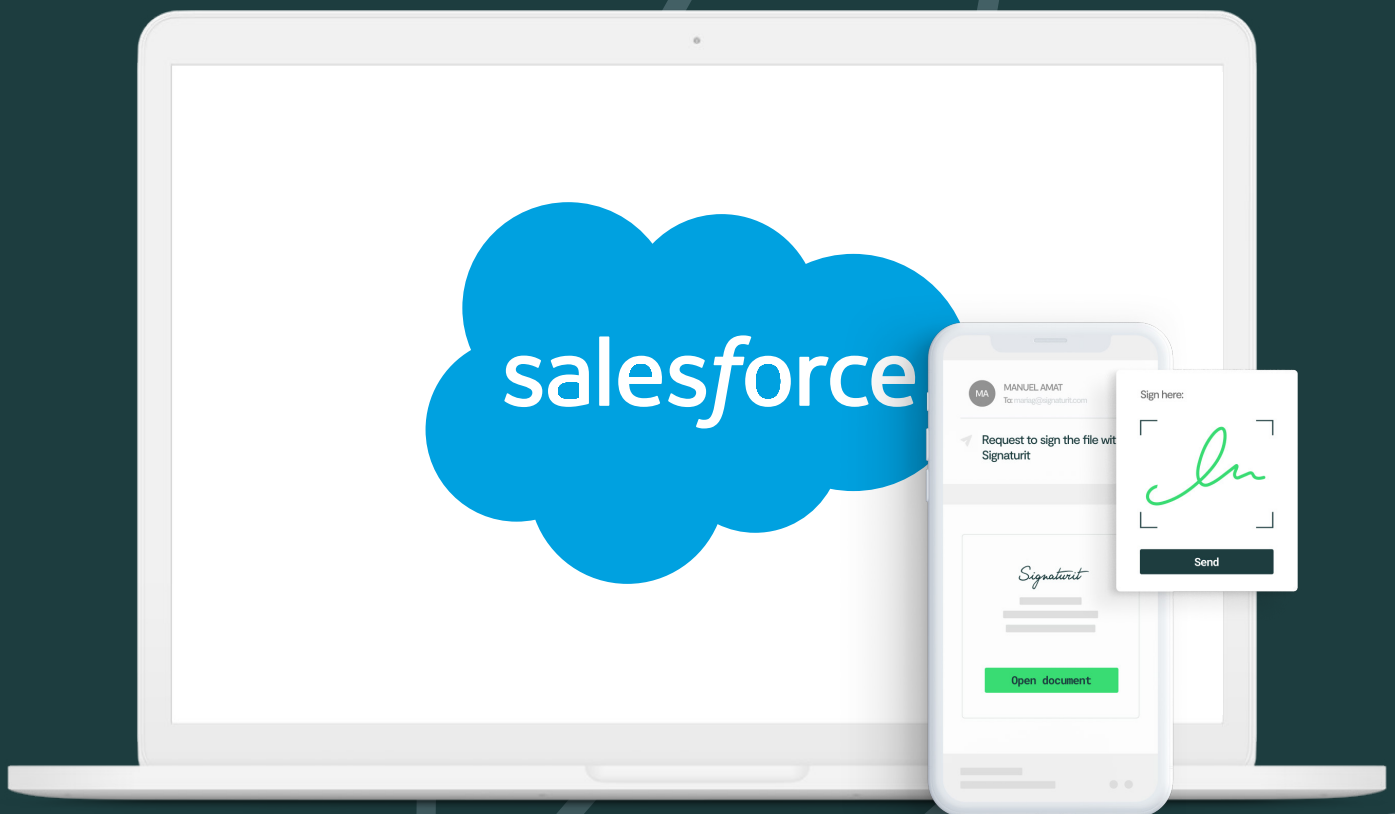
Sign up

Companies that already trust in Signaturit:

Admiral   acciona   ATRESMEDIA   AXA   GRUPO BIMBO

EY   CUATRECASAS   Damm   DAS   DECATHLON

AFFLELOU   idealista   ISS   Manpower   MEDIAPRO

Rastreator   Sabadell   TACO BELL   VOLOTEA   vueling

Signaturit
Sign anywhere, anytime

Signaturit is a Qualified Trust Service Provider (QTSP) that offers innovative Legaltech solutions for electronic signature (eSignatures), certified electronic delivery (eDelivery) and electronic identification (eID) to help streamlining communications & transactions in companies.

The legal and regulatory compliance of all electronic transactions made through Signaturit is guaranteed.

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