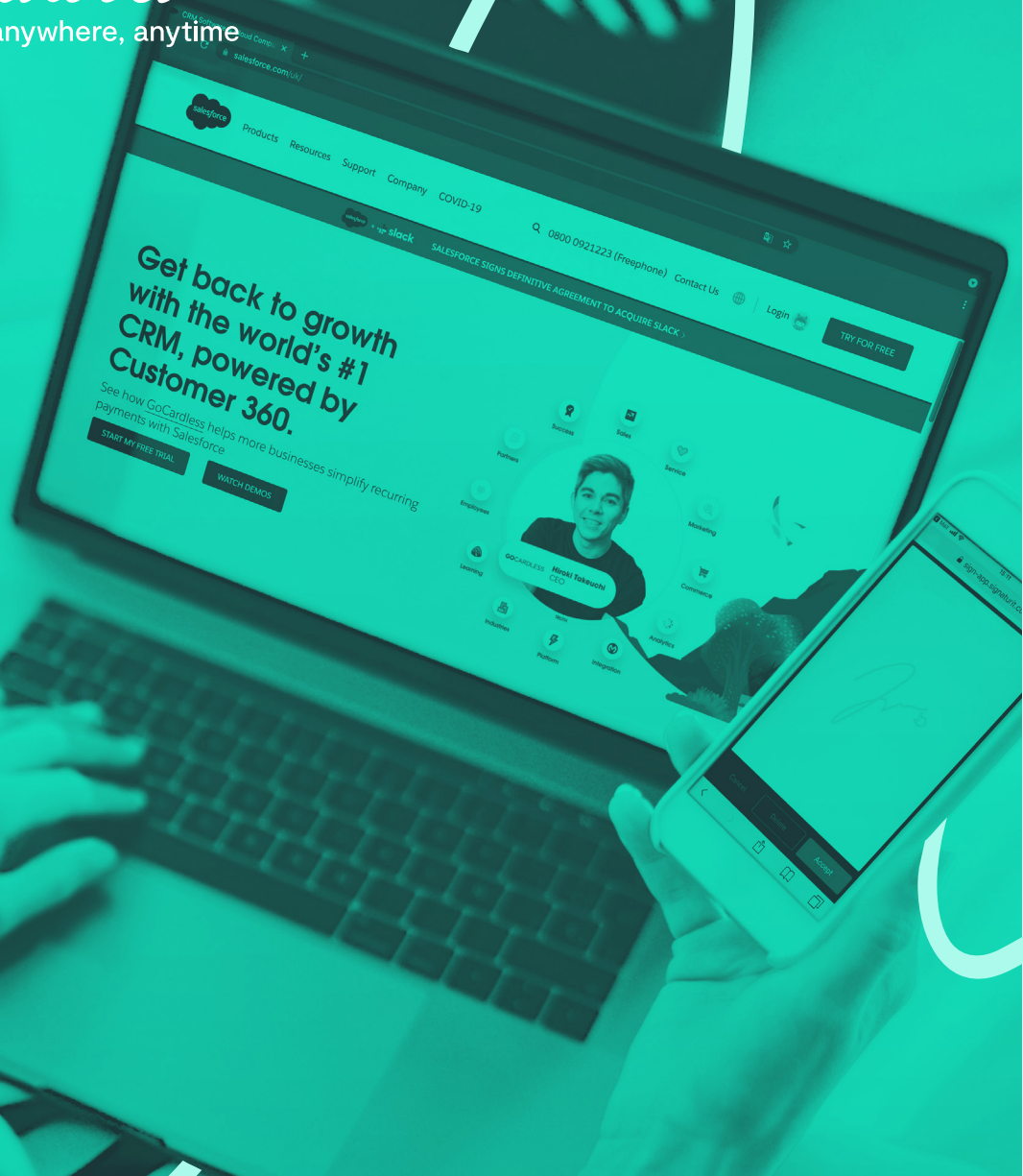


Signaturit
Sign anywhere, anytime



GUIDE

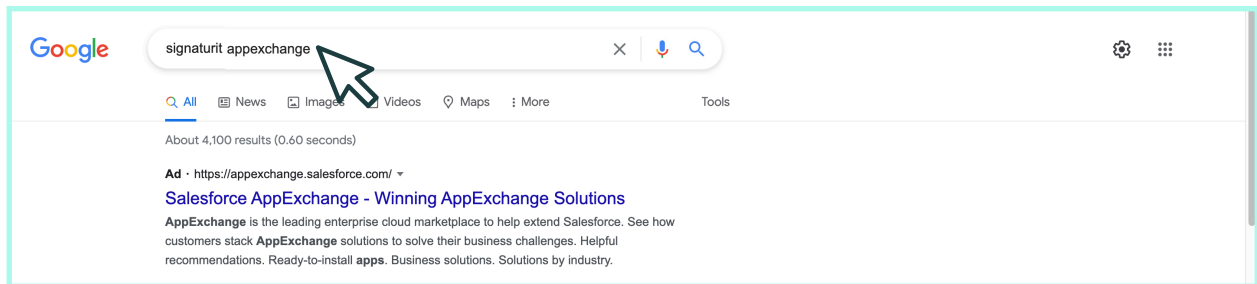
How to integrate Signaturit's electronic signature in Salesforce

- 01.** Plugin installation
- 02.** Get a Signaturit Salesforce token
- 03.** Add the token to your Salesforce account
- 04.** Send a document to sign through Salesforce

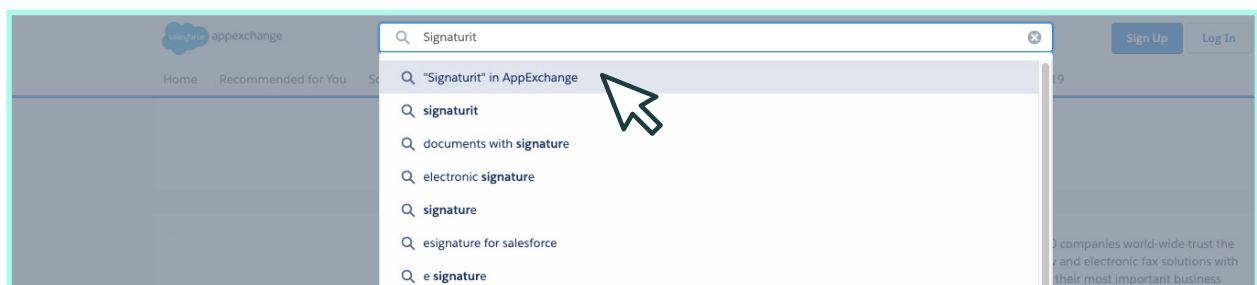
01. Plugin installation

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”



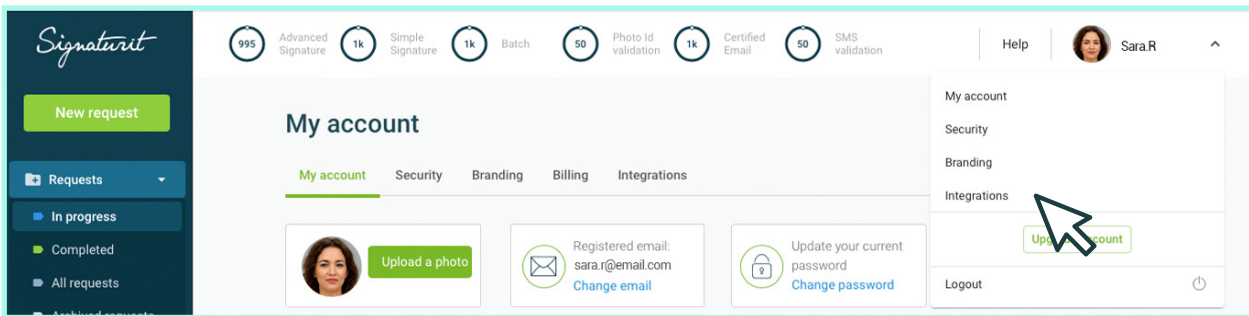
2. Enter and click “Get It Now” to begin the installation

02.

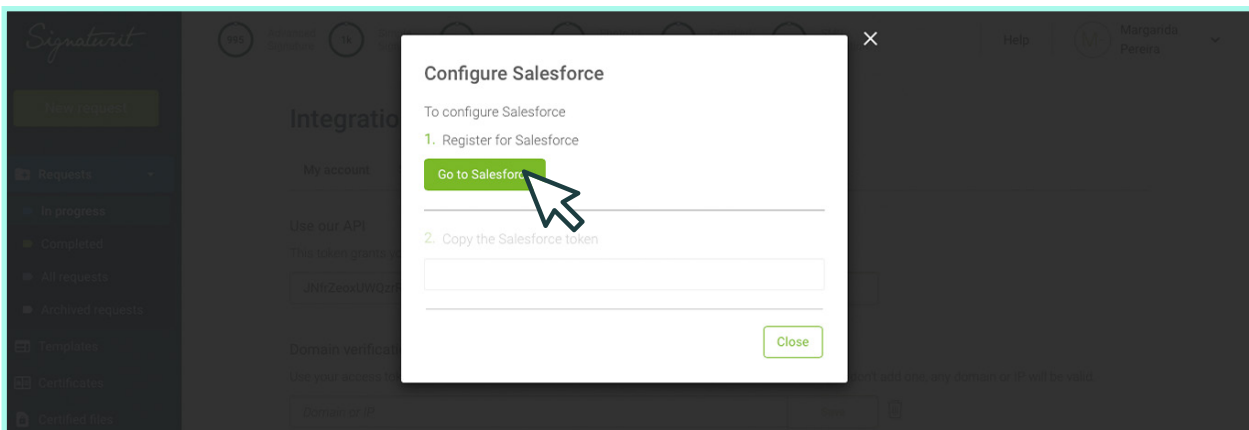
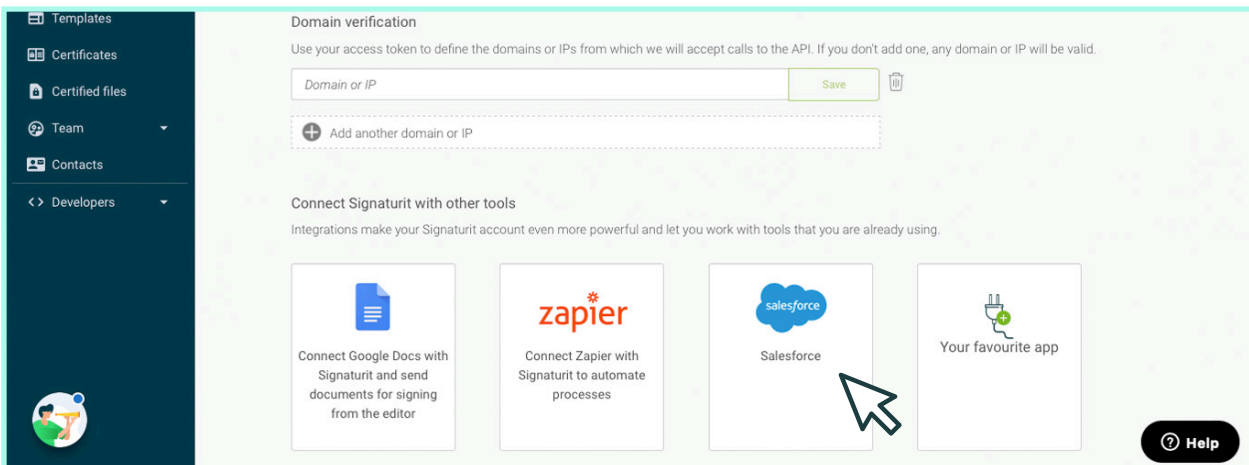
Get the Signaturit Salesforce token

1. Enter your Signaturit account and search “Integrations”

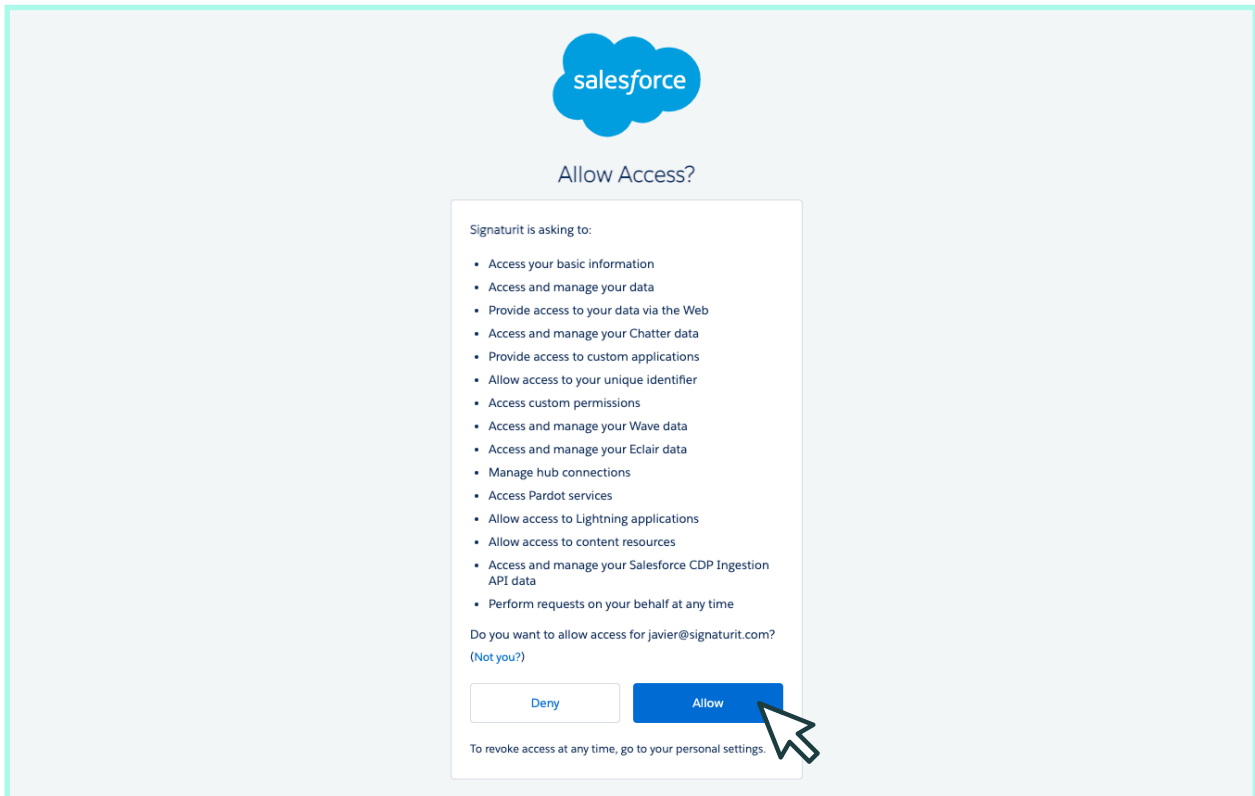
You can find it in this section by clicking on your avatar icon in the upper right-hand corner of the screen.



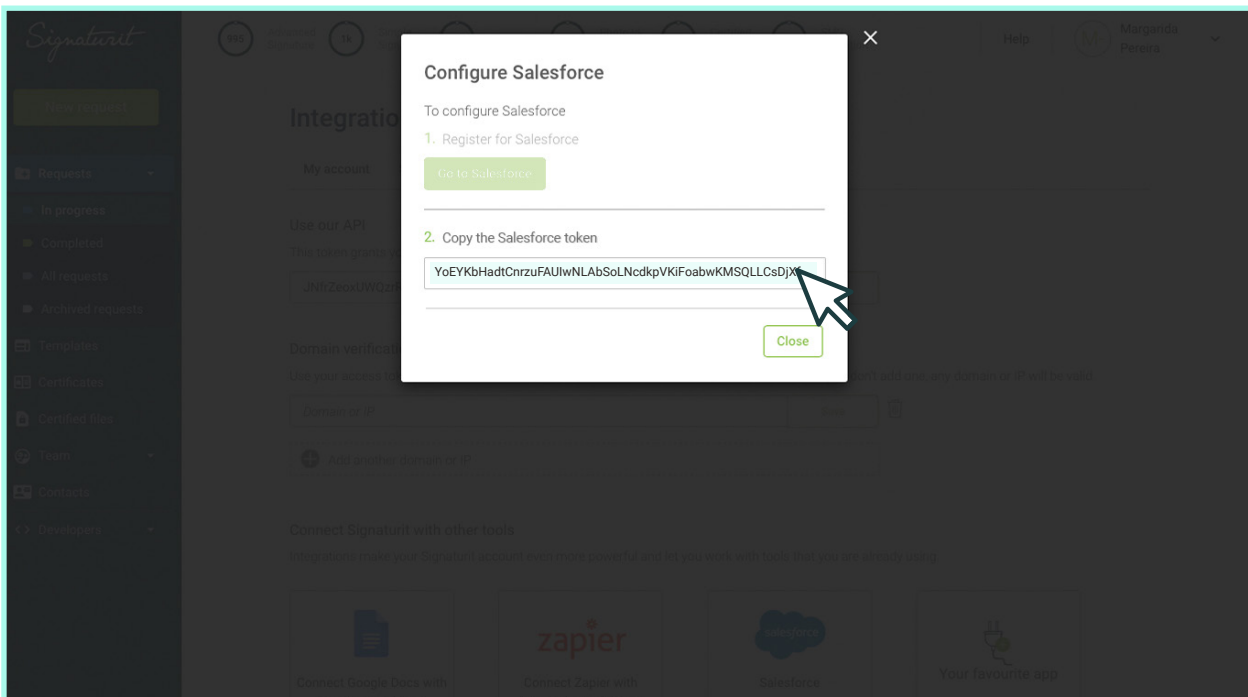
2. Click on the Salesforce icon and “Go to Salesforce”



3. Click on “Allow” to agree to connecting the tools



4. Connect to Salesforce and the token will appear

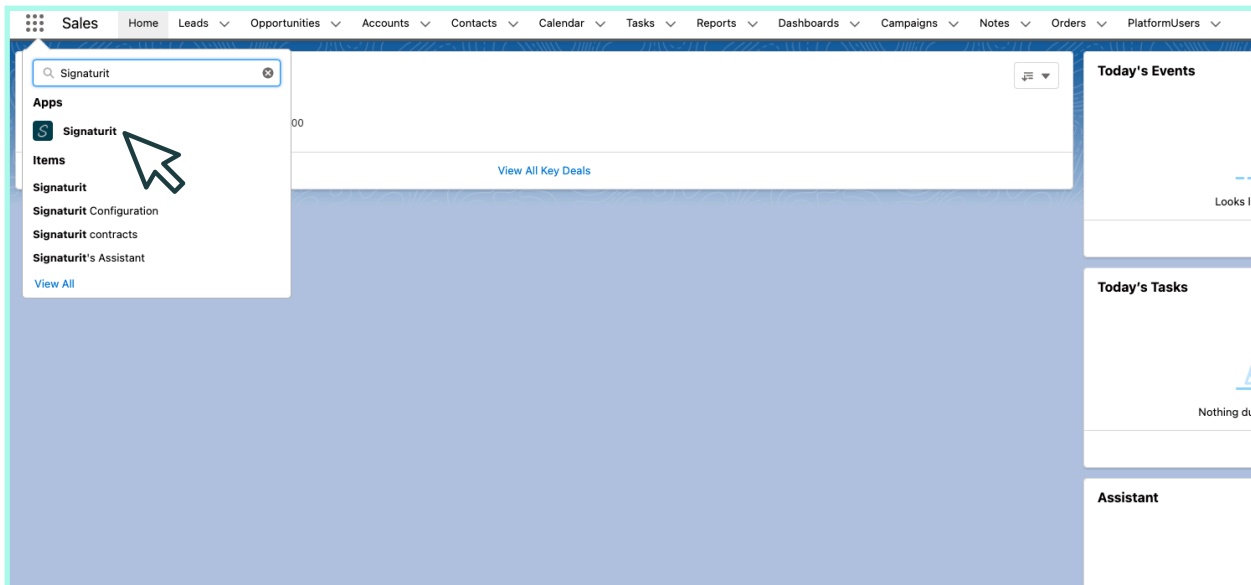


03.

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

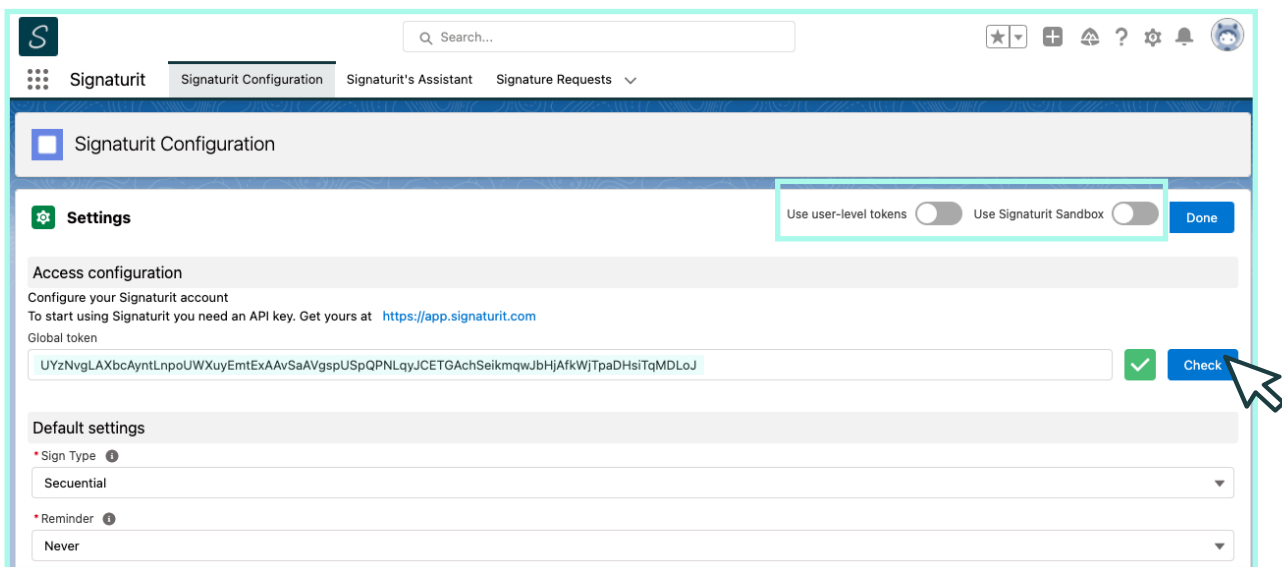
This is the token configuration screen. You have two options:

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”.

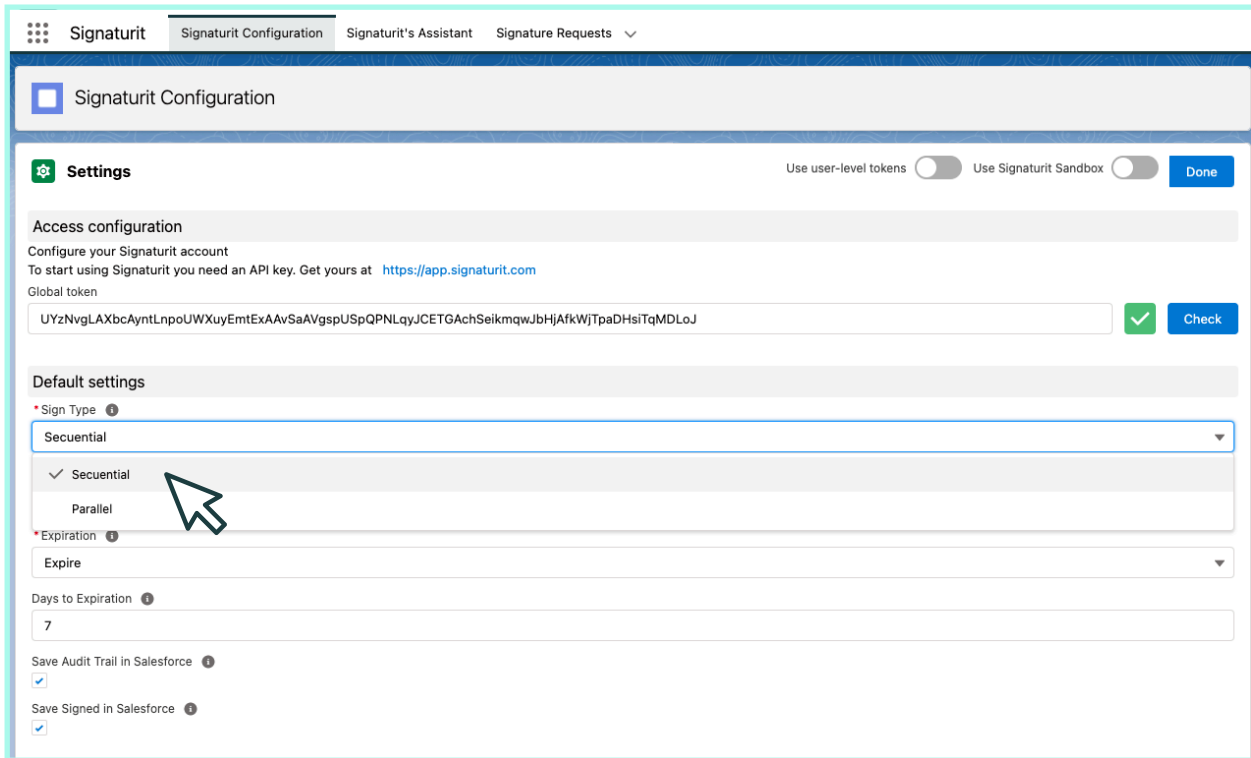
Remember that if you use a Signaturit Sandbox token for testing, you must activate the “Use Signaturit Sandbox” button.

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 correctly.

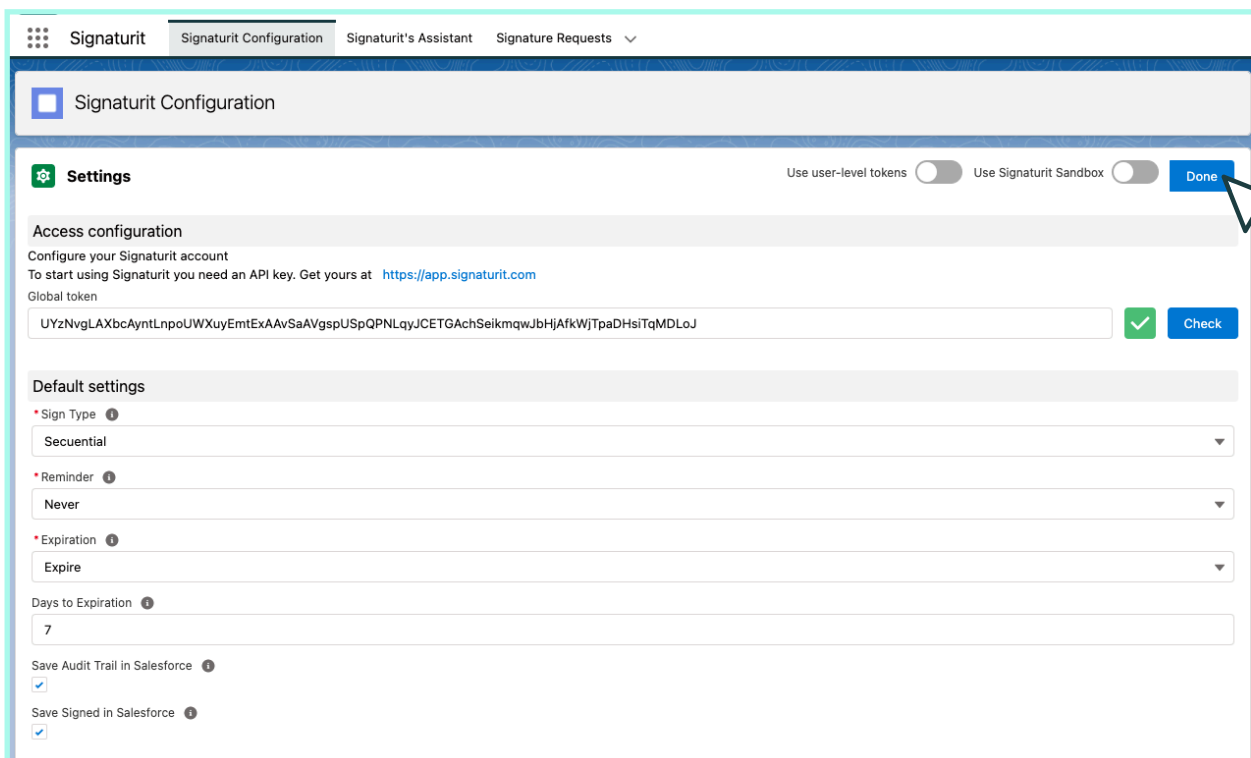


3. Now, **configure** the predetermined actions

These configurations are predetermined, but **you can select a different one for each signing request.**



4. Once it is configured, click **“Done”**

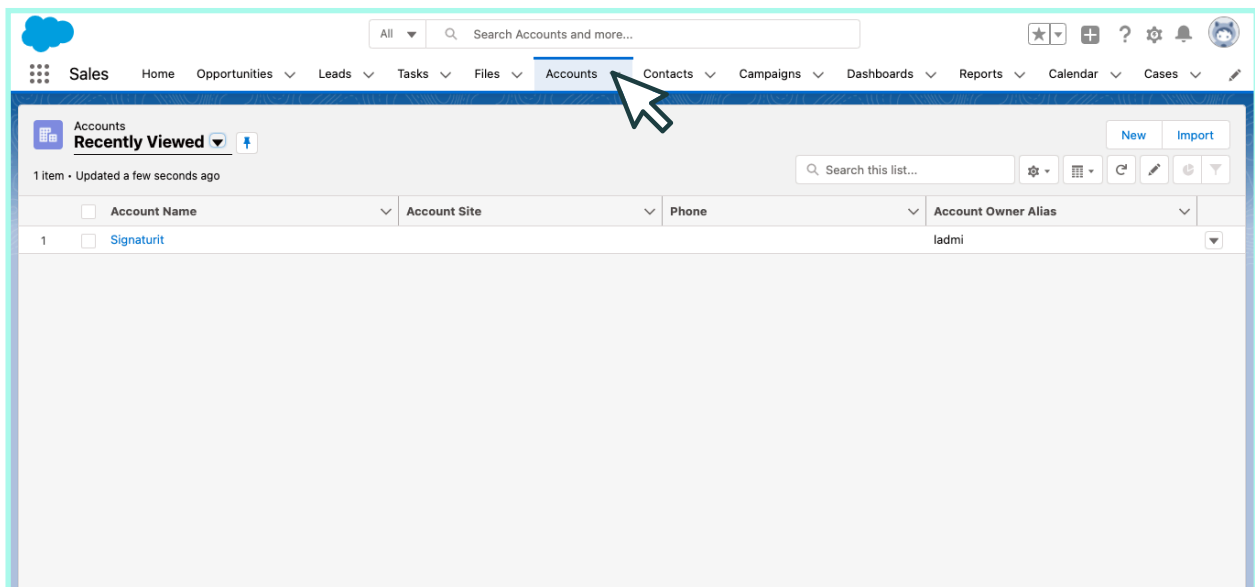


04.

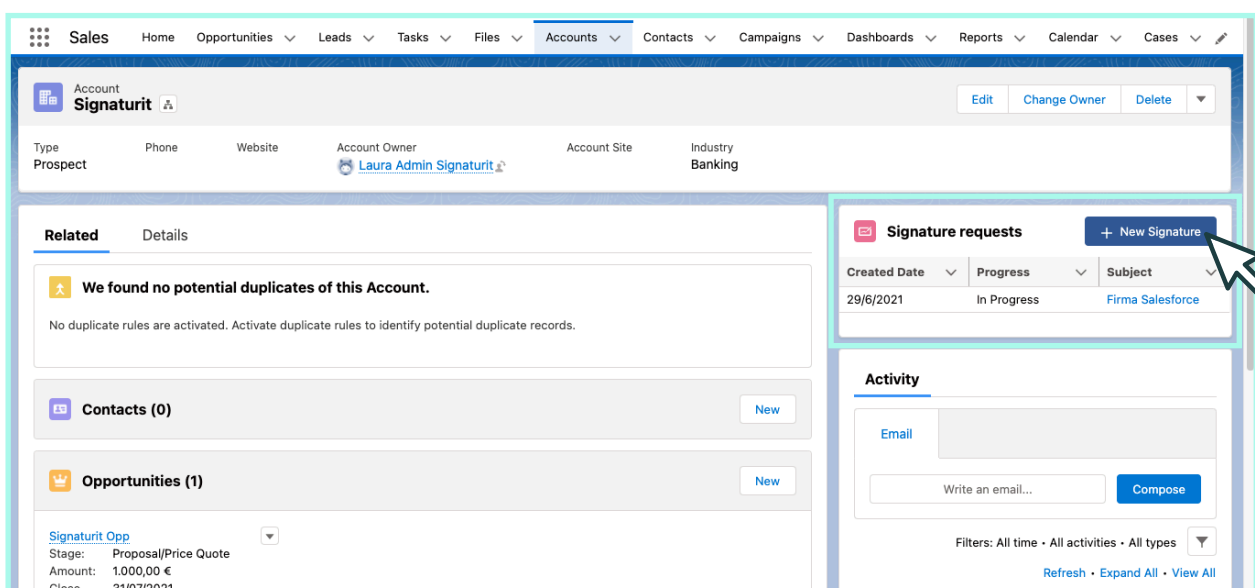
Send a document to sign through Salesforce

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.



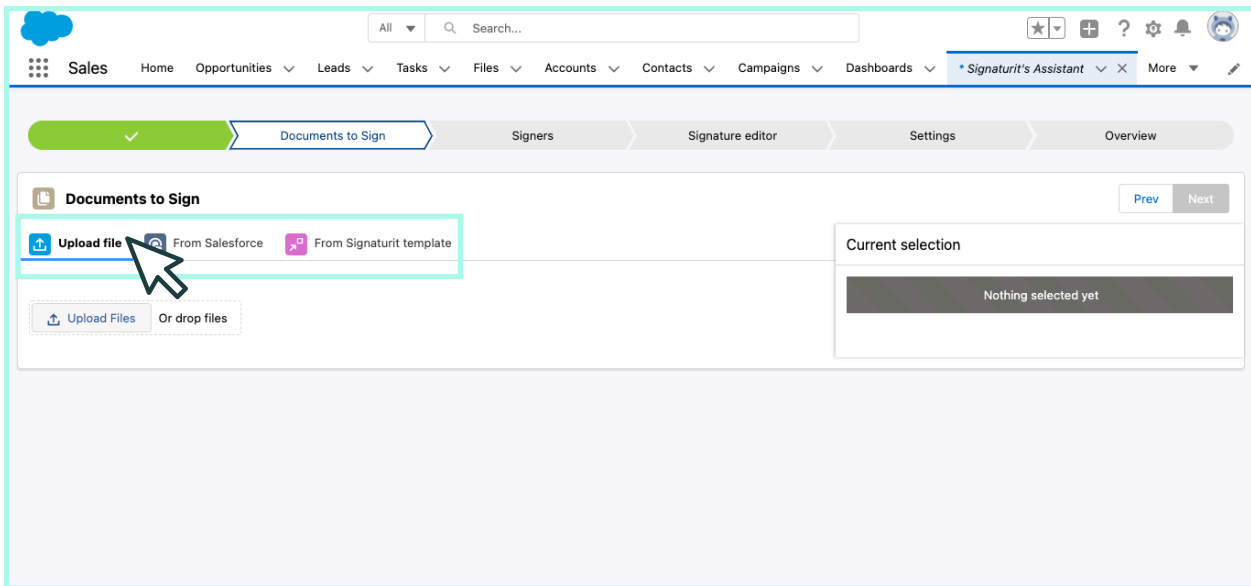
2. In the “signature requests” panel, click on “New Signature”



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

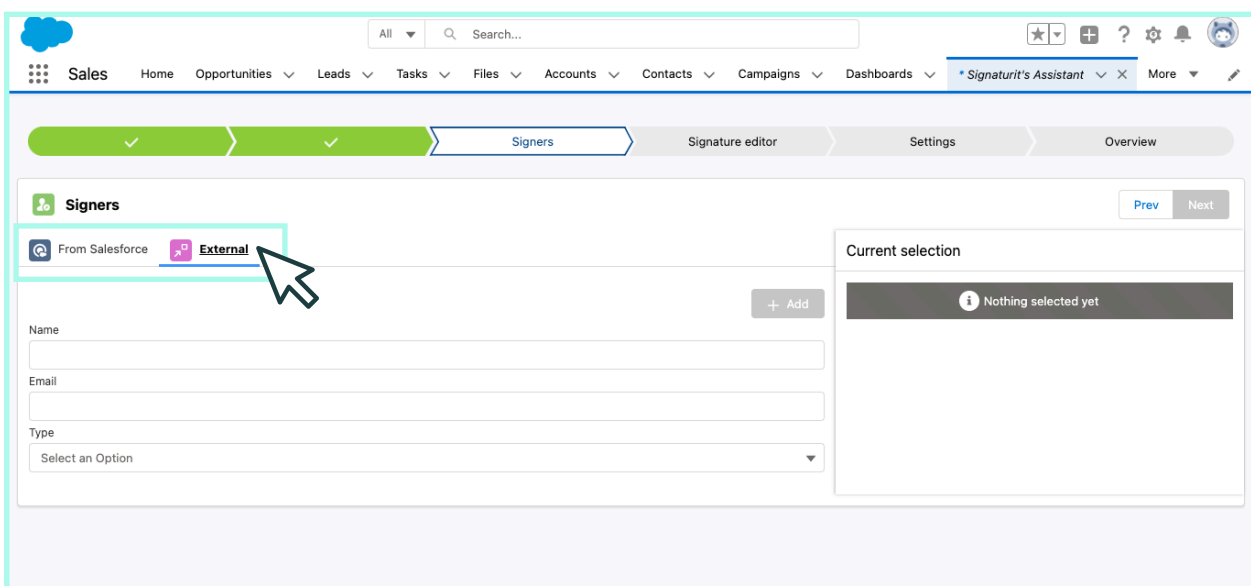
You have the following options and you can combine them however you like, up to a maximum of 15 documents:

- ✔ Choose a **Signaturit template**
- ✔ Select a **PDF document** saved in Salesforce
- ✔ Add a **document from your device**



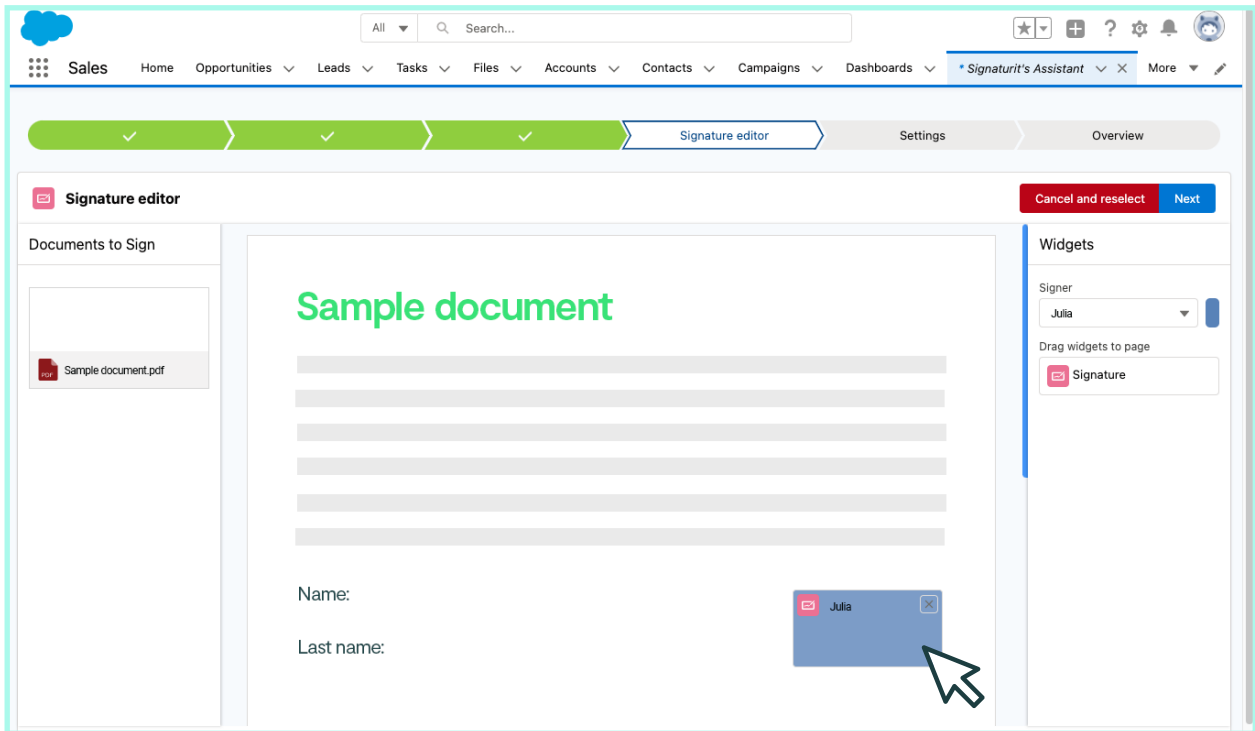
4. Select the **signatories** to whom the document will be sent

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.**



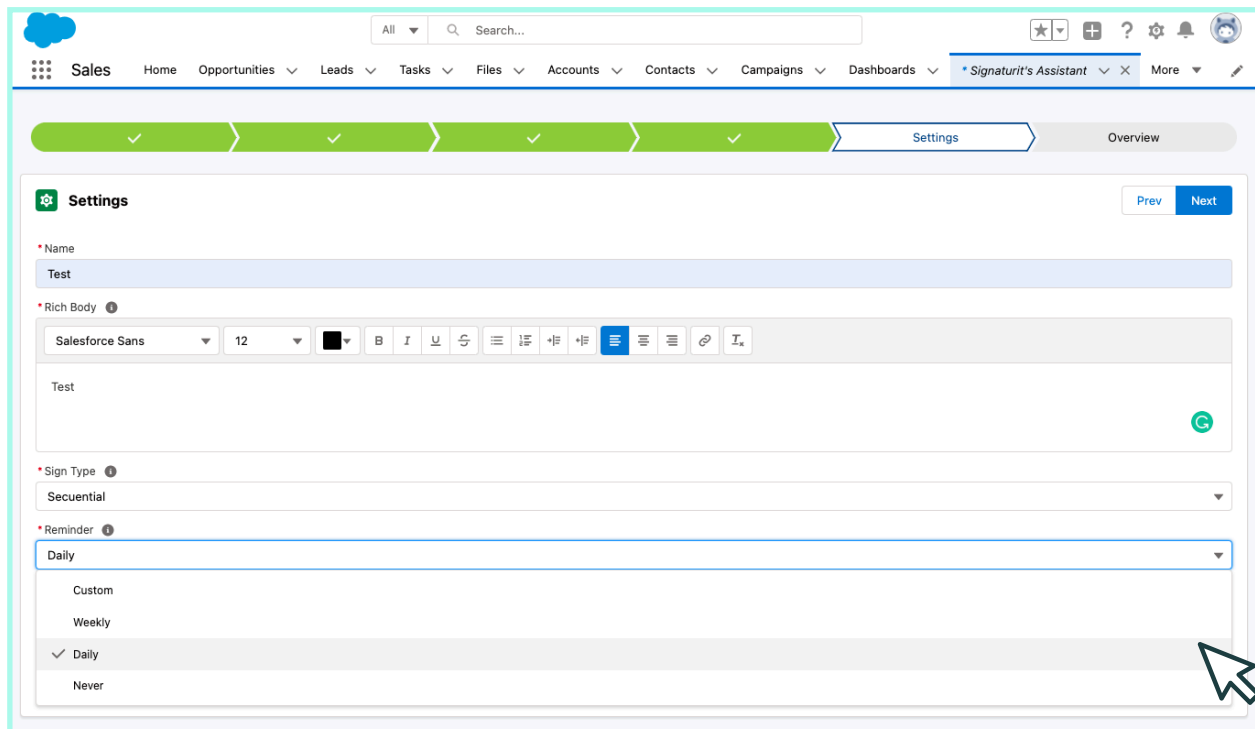
5. Configure the document with the editor

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”.

The screenshot shows the 'Settings' page in the Signaturit interface. The breadcrumb trail at the top indicates the current step is 'Settings'. The form contains the following fields:

- Name:** Test
- Rich Body:** A rich text editor with 'Test' entered.
- Sign Type:** A dropdown menu with 'Sequential' selected. A mouse cursor is pointing at this field.
- Expiration:** A dropdown menu set to 'Expire'.
- Days to Expiration:** A text input field containing the number '2'.

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.

The screenshot shows the 'Overview' page in the Signaturit interface. The breadcrumb trail at the top indicates the current step is 'Overview'. The page displays the following information:

- Documents to Sign:** A table showing a document named 'Sample document.pdf' with a file extension of 'pdf', a size of '113 KB', and a creation date of '29-Jun-2021'.
- Signers:** A table showing a signer named 'Julia' with the type 'Signer' and email 'julia@email.com'.
- Settings:** A section showing the document name 'Test' and the rich body content 'Test'.

A green 'Submit' button is located in the top right corner of the main content area, with a mouse cursor pointing at it.

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.

The screenshot displays the Salesforce interface for a Signature Request. The main content area is titled "Signature Request Test" and includes a "Sharing Hierarchy" button. On the left, there are summary statistics: Number Signatures (4), Number Completed Signatures (4), and Number Cancel Signatures (0). Below these are configuration options for Sign Type (Sequential), Reminder (Daily), and Save Audit Trail in Salesforce (checked). The right side of the interface shows "Signature Request Files (2)" and "Files (3+)". A mouse cursor points to a file named "Test - Documento-de-ejemplo.pdf - SignedDocument.pdf" in the "Files (3+)" section.

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

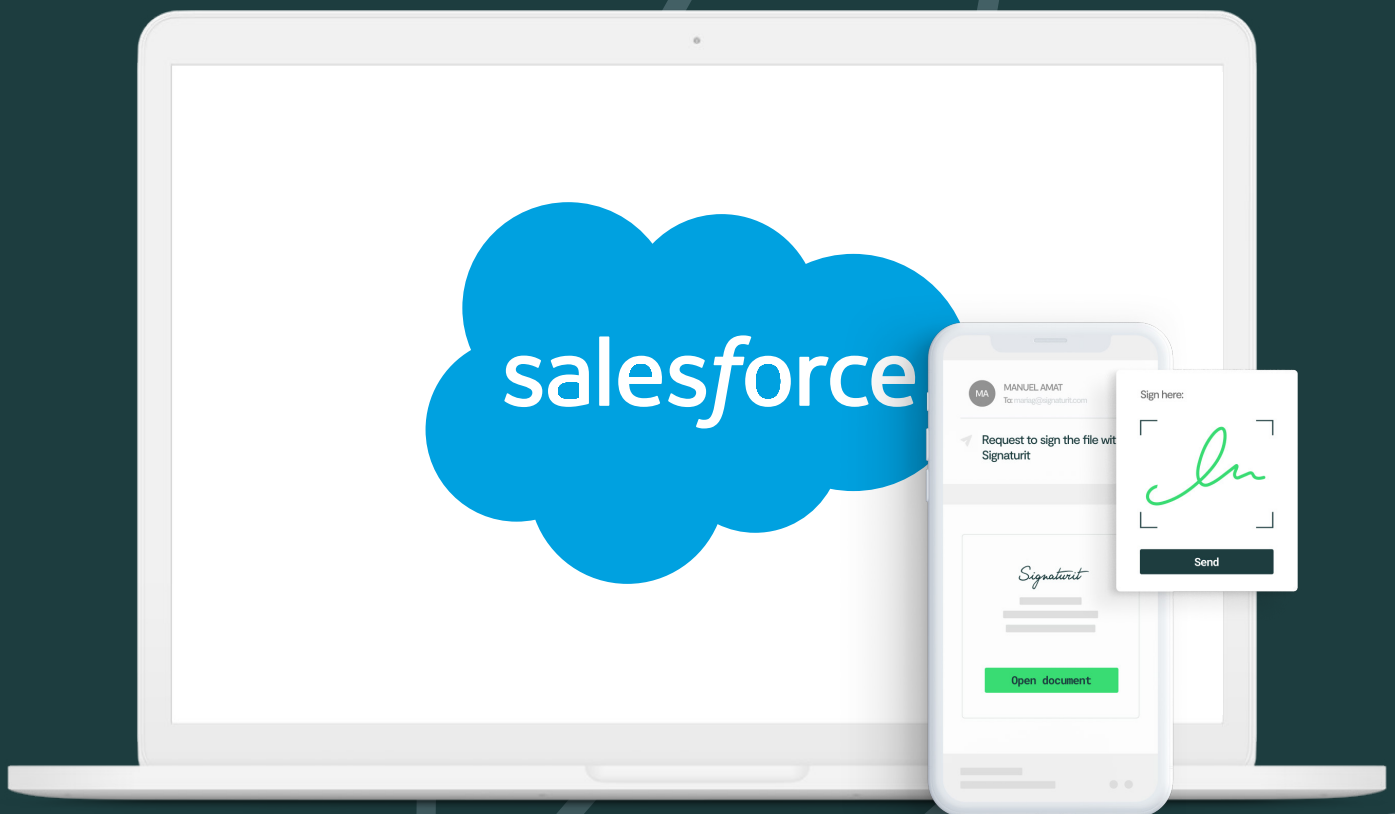
The screenshot shows the Salesforce Reports interface. The report is titled "Report: Signature Request with Signature Signers" and "Signaturit Requests". It shows a total of 35 records. A donut chart displays the record count, with a legend indicating "Completed" (blue) and "In Progress" (dark blue). Below the chart is a table with columns for Name, Progress, and Signature Request File Name. A mouse cursor points to the "Reports" menu in the top navigation bar.

Name	Progress	Name	Progress	Signature Request File: Progress	Signature Request File: Name
Firma contrato (4)	In Progress (4)	Mireia (2)	In Progress	In Progress	ISCV-Manualdeusuario-300421-1159.pdf



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



[Sign up](#)



Companies that already trust in Signaturit:



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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