RSIGN FOR SALESFORCE

Securing Email and Digitizing Workflows with E-Signatures

RSign® for Salesforce adds advanced e-signatures for sending documents to recipients to record their electronic signatures, and much more.

RSign® for Salesforce includes options to create forms as templates with a controlled fill and e-sign process, pre-populate the templates with data from Salesforce fields, and backfill filled in form data and e-sign status and records into mapped Salesforce fields.

> *RMail® for Salesforce is a sister application that can provide more functionality around encrypting email, tracking, certifying and proving email delivery, and sharing large files through Salesforce.com.*
>
> *This guide focuses on RSign functionality. If you need email encryption or certified e-delivery proof, refer to the RMail for Salesforce guide. These two applications together are a major update to the original RPost for Salesforce application.*

Customers worldwide have been using RSign and RMail for more than a decade, choosing their award-winning features:

- Email Encryption Simplified for Privacy Compliance
- Registered Email™ Certified Open Tracking and E-Delivery Proof
- E-Signatures and Forms
- Secure File Sharing, and more.

WHAT'S NEW

- Additional drag-and-drop functions to set controls for the recipient fill and sign process.
- More security for privacy and digital authentication.
- Flexibility to map Salesforce fields to pre-fill forms before sending for e-sign.
- More form field data and analytics backfilled into Salesforce.
- New automation rules to force features based on message template or field data.
-

WHY GREAT?

More Enjoyable Productivity:

- Brings the main RSign service features – **drag-and-drop controls, templates, rules, pre-fill, backfill, certified proof** right into the comfortable Salesforce.com interface.

- Makes it easy to trigger follow-up actions in Salesforce based on message and signing status, or backfilled form data.

RSign makes e-signatures simple and makes digitizing workflows affordable.

RSign® is the simplest to use, fullest featured, and most affordable enterprise grade web-based electronic signature service.

RSign makes it easy for signers to complete and sign documents using any desktop or mobile web browser in an intuitive, guided signing process.

- **RSign makes it easy to digitize workflows** with a friendly customer success team to advise and support process change.

  Many customers choose RSign after reviewing the marketplace. They realize RSign teams are the most accommodating, flexible, and knowledgeable. This eases their burden of automating and digitizing complex processes.

- **RSign brings expansive enterprise-grade features at a lower cost;** generally, half the cost of other full-service providers.

  If you have e-signatures somewhere in your organization's processes and are looking at renewal options or reducing cost as you expand use, RSign provides all the functionality that you will need at a lower cost and with a friendlier service experience. RSign makes it easy to automate with Salesforce.com or its full set of APIs and pre-built integrations.

- **RSign is committed to innovating** for its customers evolving needs.

  There are only two enterprise-grade e-signature pure-play companies today; RSign and one other that is more expensive and more difficult to work with. These pure plays are driving product innovation. Other global e-sign vendors have been purchased by diversified companies and as typical, once part of a larger product portfolio, innovation slows. RSign is easy to work with, the most affordable, and a full-featured innovator.

- **RSign includes a simpler user design**, a highly configurable user interface, sharable templates, template rules and dependencies, custom workflows, real time reporting, advanced document configurations, APIs, and much more. RSign® has everything customers need in an e-signature service.

- **RSign patents add the most robust authenticatable audit trail** embedded in the e-sign record. Track transmission data, timestamps, and signoff; all signoff metadata may be secured into the final signoff record.

- **RSign and e-signatures by RPost® are a worldwide standard**, having been used for more than a decade in more than 100 countries worldwide by businesses of all sizes.

  Why RSign® services worldwide? Services are used by customers in countries worldwide in English, German, French, Dutch, Danish, Italian, Spanish, Portuguese, and other languages, having been deployed by global corporations, governments and businesses of all sizes across industries.

Simplified IT Experience:

- For IT departments, this combination
  - minimizes add-in complexity,
  - creates easier ways to trigger follow-on activities in Salesforce based on delivery information or e-sign status,
  - simplifies the recipient email encryption experience which minimizes calls for help to IT support staff, and
  - arms end users with e-sign status, tracking and proof visibility – no need to ask IT what happened to their important email.

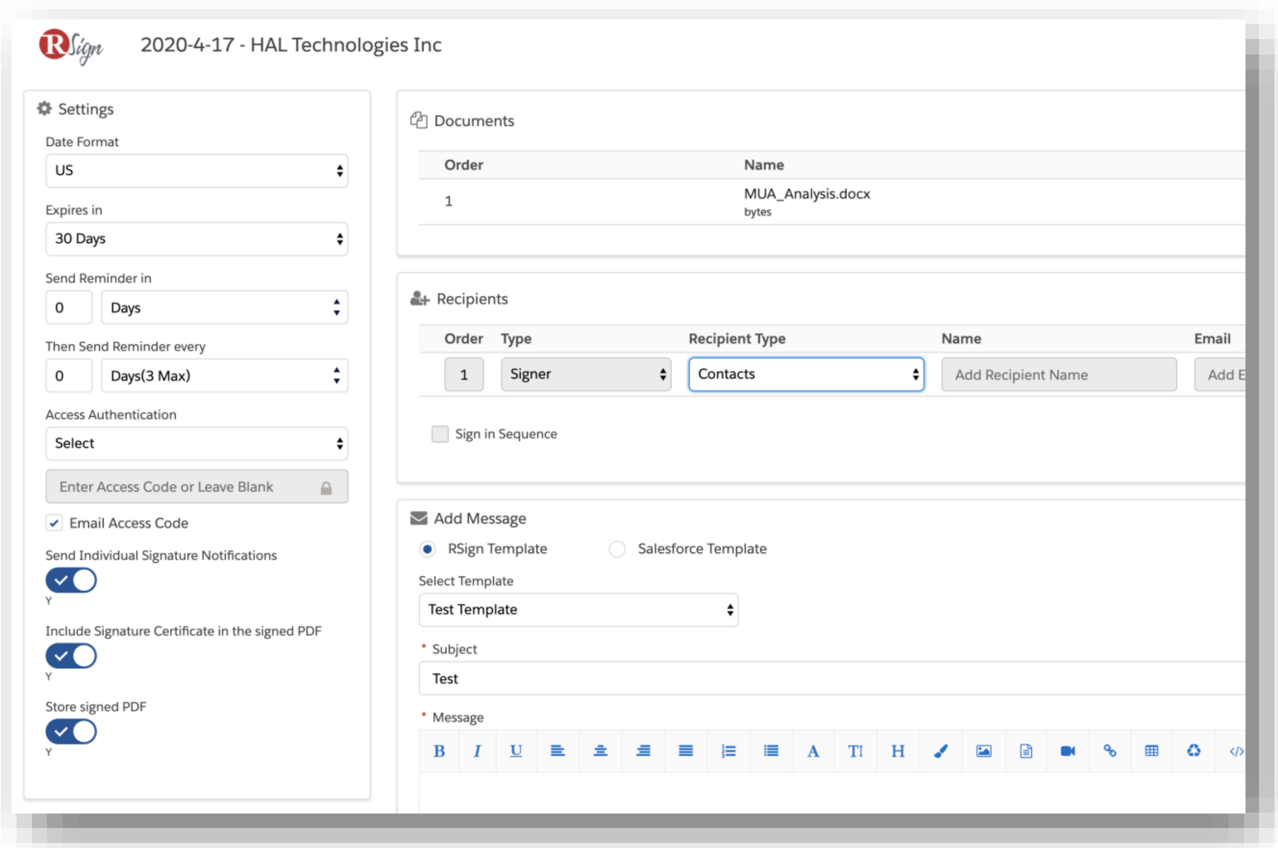
HOW DO I GET STARTED?

Step 1. Getting Started.

1. A Salesforce.com administrator can install RSign for Salesforce with one click.
2. Configure users for RSign (connect Salesforce.com user account to an RSign user account).
   a. A base RSign service license is included – you do not need anything further to get started, for use of up to 3 messages per user per month, auto-renewing each month.
   b. For business plans or advanced settings, contact your RSign partner or RPost (click here).
3. Create any policies (add functionality where you want it).
4. Enable RSign features to be accessible from available layouts. You can do that by going to RSign App Configuration and selecting the Layouts tab.

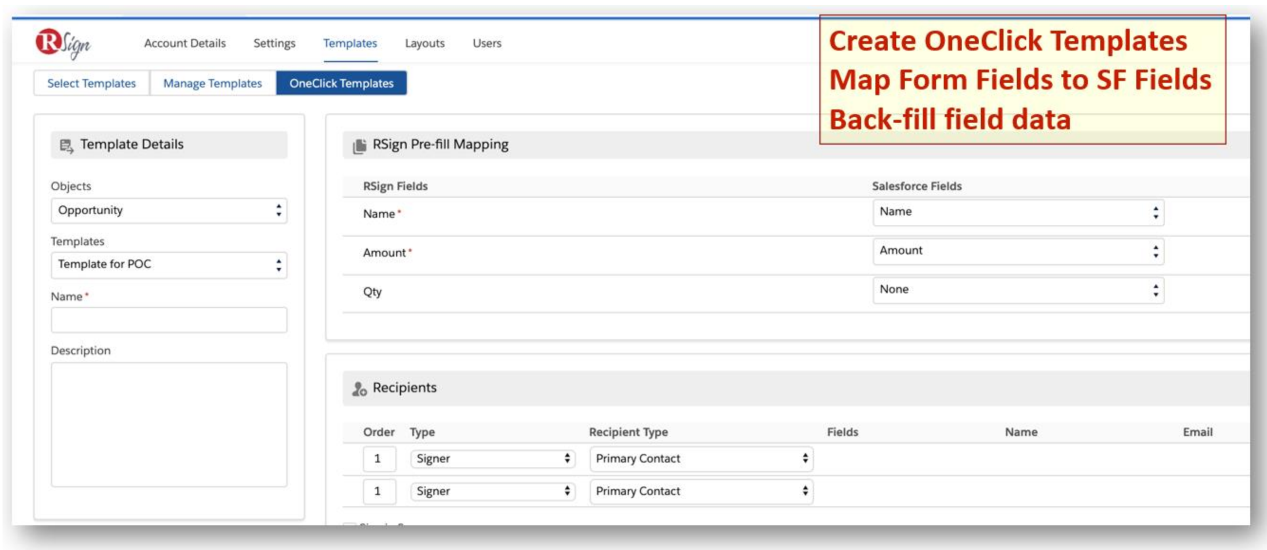
Step 2. First Use.

1. Once installed, you will see the RSign feature menu when sending.



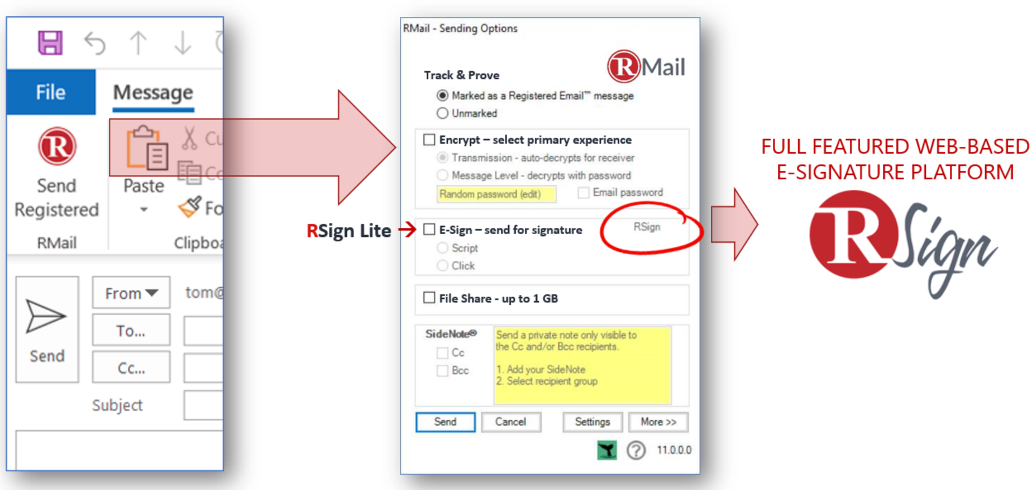
2. With RSign, one can also create templates based on existing forms, and pre-fill data from Salesforce fields into those templates, and map data from fields filled by the signer into mapped backfill Salesforce fields.

3. Message and e-sign status and final signed forms and documents are backfilled into Salesforce fields.
4. OneClick Templates can be set up that automate the pre-fill and backfill of data for specific templates.



Step 3. Advanced Settings.

1. The Salesforce administrator may access more settings in RSign web interface and RPortal than available in the Salesforce app. Administrators should familiarize themselves with these admin panels. Ask your account manager for details.
2. The Salesforce administrator may also install RMail for Outlook for users to have parallel features available for email sent from Microsoft Outlook.



Step 5. RSign and RMail Service Plans.

1. **RSign:** Individual users can opt for different service plans, the most popular being RSign Standard, Business, and Enterprise plans. These and other plans provide a variety of low-use, low-cost options, power use options, volume options, and Salesforce app sending options. Remember:
    a. All users can use the service with a base use (3 messages per user per month) without any subscription or cost.
    b. A customer administrator can ask for access to RPortal to manage users, service plan levels, and advanced settings, or manage some of these functions inside the RSign for Salesforce app.

    TIP*: Higher volume business users of RSign for Salesforce require an additional -- and very affordable -- service plan for sharing volume of e-sign messages among a set of senders.*

WHAT ARE THE MAIN BENEFITS?

E-Sign Simple Enough that People Actually Enjoy Using. Plus, all the features you will ever need.

RSign® makes e-signatures so simple for all staff, that it encourages use. More use means more cost savings, time savings, and faster business. RSign has all enterprise-grade features you will ever need.

Legal and Auditable Proof. Assurance, confidence, and peace of mind.

RSign® makes it easy to view and rely on the Signature Certificate for e-sign tracking, a forensic audit trail, and sent and signed content and timestamp information. A robust record of who signed what when provides confidence that the e-sign process and record will stand up to scrutiny if ever challenged in the future. Legal Proof®.

Private and Secure. Security and authentication for privacy and industry compliance.

RSign makes e-signing private so that senders can enjoy the benefits of e-signatures even when private transaction data, strategic, health, or protected consumer information is in the agreements or forms. RSign includes a variety of security, authentication, and privacy options to fit any sensitive e-sign situation.

Enterprise Grade and Affordable. RSign is affordable and maximizes cost and time savings.

RSign provides all the enterprise-grade features in an easy-to-afford offering, making it cost effective to convert almost any document to e-signatures, digital forms, and modernized workflows. Businesses enjoy more cost savings with less paper, mail, postage, administrative time, and a low e-sign service cost. Unlike other providers, RSign also offers automatic renewals fixed, that do not increase annually.

Optimize with Ease. Experts help you automate and digitize more.

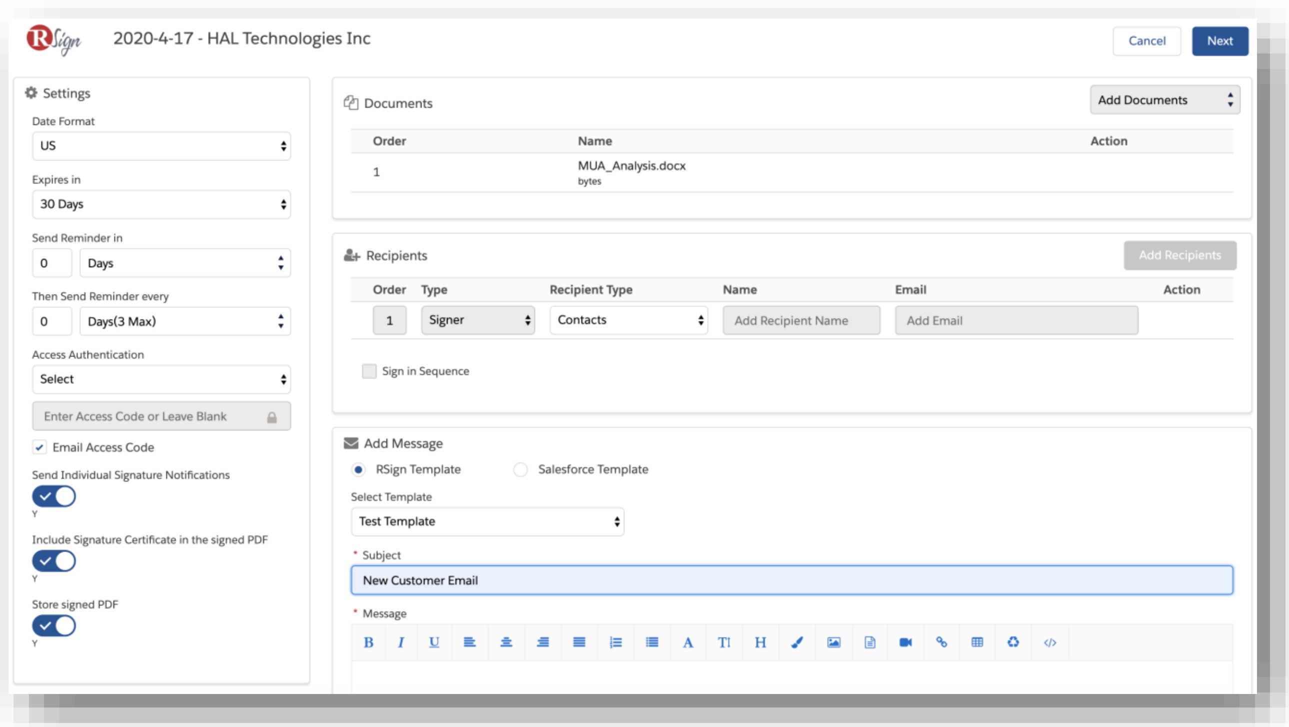
RSign® makes e-signature and digital form automation easy, with expert staff to guide at every step. Many customers choose RSign after reviewing the marketplace and realizing RSign teams are the most accommodating, flexible, and knowledgeable so as to ease the burden of automating and digitizing complex processes. RSign staff have been rated by customers as the "most helpful" experts customers enjoyed working with.

ADMINISTRATOR GUIDE

1. Interface After Installation

Most administrators will create OneClick Templates that are pre-set with pre-fill data from Salesforce fields, a controlled fill and sign experience at the recipient, and backfill recipient inputs into form fields and message and e-sign status information into Salesforce fields; and then trigger follow-on actions based on the backfilled data.

Details of some of the unique functions specific to RSign operating in Salesforce are in this guide. To learn more about the functionality of each standard RSign feature or service, visit the RSign support center at https://support.rpost.com. Explaining the function of each RSign feature is outside the scope of this guide.



Business Challenges that are Solved with RSign

1 **Businesses need to obtain recipient signature on sent agreements in a simple, intuitive, fast, and paperless process**; one that returns a uniform robust e-record of a signoff. Sending attached to standard email is cumbersome for the recipient. Paper is slow and costly. Fax is often inconvenient.

2 **Businesses need a uniform, trusted record of electronic signoff; one that can be relied upon as strong evidence should there be a dispute in the future.** The e-record must be legally binding and in a uniform format that they can trust without evaluating the evidential weight of each signoff record.

3 **Many agreements and forms contain sensitive terms, pricing, financial, private consumer, or health information** - information that often must remain private. Sending by standard email and

receiving signoff by fax is often not private. The sending, filling, and returned record needs privacy options.

4 **Businesses need expansive features in an enterprise-grade e-signature service at affordable cost, as they expand use across their organization and volumes increase.** Businesses can generate more efficiencies with e-signatures if the costs are affordable and predictable.

5 **Digitizing workflows with e-signatures and forms requires deep knowledge of the business processes needing modernization matched with the art-of-the-possible with e-signature services.** Innovation staff need a trusted partner to collaborate with and to adapt e-sign services to specific processes.

6 **Businesses need to automate processes**; automate pre-filling forms with some data, sending for signoff, tracking responses, obtaining the signoff record, and at times, back-filling completed form data into sender systems. Automation maximizes efficiency, controls, and reduces cost and risk.

Main RSign Features

E-Signatures Made Simple. Simple e-sign user experience for sender and signer.

Accelerate legally binding electronic signoff with RSign, a simple-to-use, full featured e-sign service. Attach any document and send for recipient e-signoff; instant for users to send agreements and forms to fill out and e-sign. RSign makes it easy for signers to complete and sign documents using any desktop or mobile web browser in an intuitive, guided signing process. RSign includes a simpler user design, highly configurable user interface, sharable templates, real time reporting, and more.

Signature Certificate with Forensic Audit Trail. Records with the highest evidential legal weight.

RSign® patents create the most robust authenticatable audit trail embedded in the e-sign record. RSign returns a Signature Certificate that serves as a uniform, forensic record that can self-authenticate, re-constructing all transmission tracking, content, and timestamps regardless of recipient systems. The Signature Certificate, which is in a globally recognized evidence format, may be appended to the signed agreement or separate, and it may be imported into systems using the RSign for Salesforce.

Privacy with Encryption and RSign Inbox. E-Signatures built for HIPAA and GDPR privacy compliance.

RSign® has several levels of security to choose from; encrypt the transmission to the recipient and return the signed agreements and forms encrypted, manage decryption password settings, create unique access codes for multi-factor signer authentication. RSign also includes APIs to transmit data for signoff via API and RSign Inbox, so the signing invitation is accessible in any browser without the need for an email invitation. RSign includes advanced encryption, security, and compliance options.

Enterprise-Grade Features at Affordable Cost. Every imaginable workflow setting simply included.

RSign brings expansive enterprise-grade features at an affordable cost; generally, half the cost of other full-service providers. RSign includes highly configurable user interfaces, sharable templates, template rules and dependencies, sequential signing, custom workflows, real time reporting, advanced document configuration, advanced security and authentication, APIs, and much more. RSign provides all the functionality that you will need at a lower cost and with a friendlier service experience.

Automation with Experts to Guide the Way. Rated "most helpful"; experts you will enjoy working with.

RSign® makes it easy to automate. Many customers choose RSign after reviewing the marketplace and realizing RSign teams are the most accommodating, flexible, and knowledgeable so as to ease the burden of automating and digitizing complex processes with quick deployment for any organization. RSign offers a full set of APIs, pre-built integrations for Salesforce.com and other platforms, and API solution sets with plenty of documentation, code samples, test frameworks, and expert guidance.

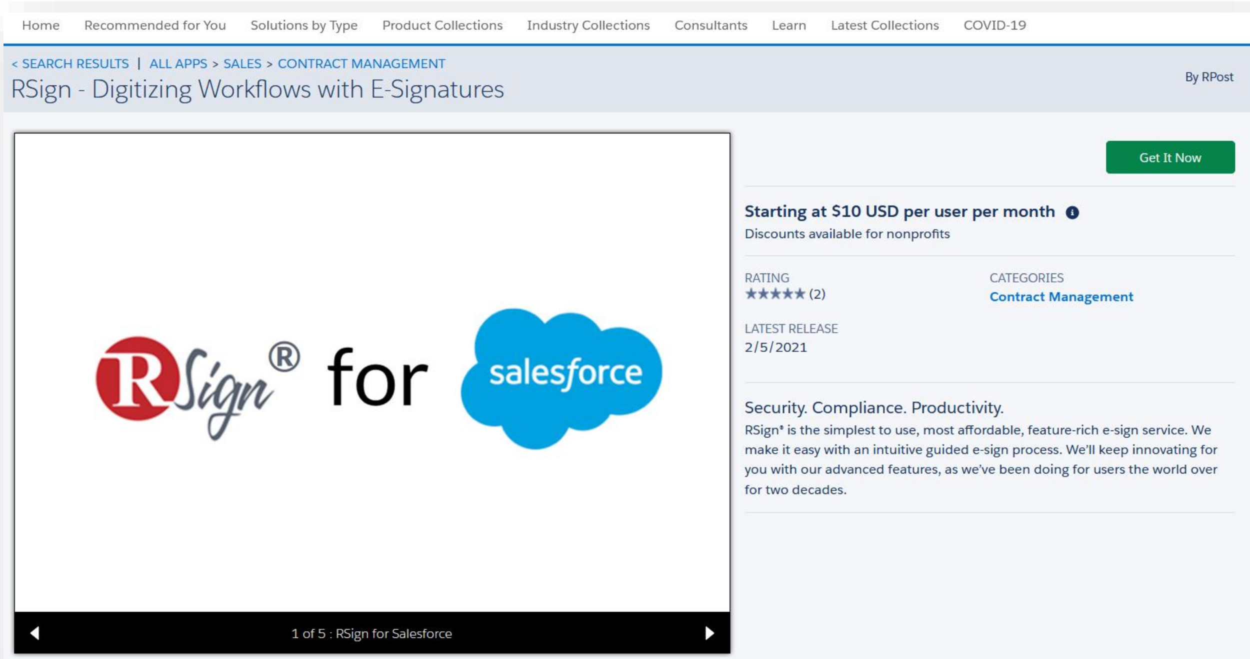
2. Installing Details

2.1. Installing RSign for Salesforce into Salesforce.com

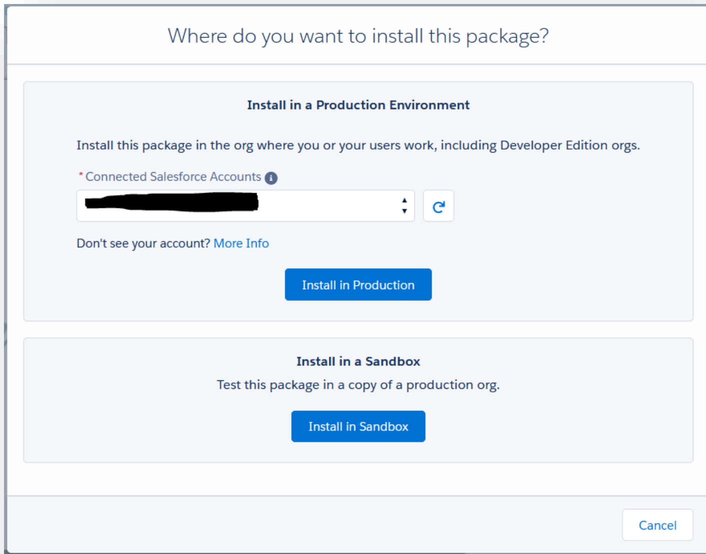
RSign for Salesforce

(This replaces RPost for Salesforce in the apps marketplace. Access RSign for Salesforce with the following installation URL below).

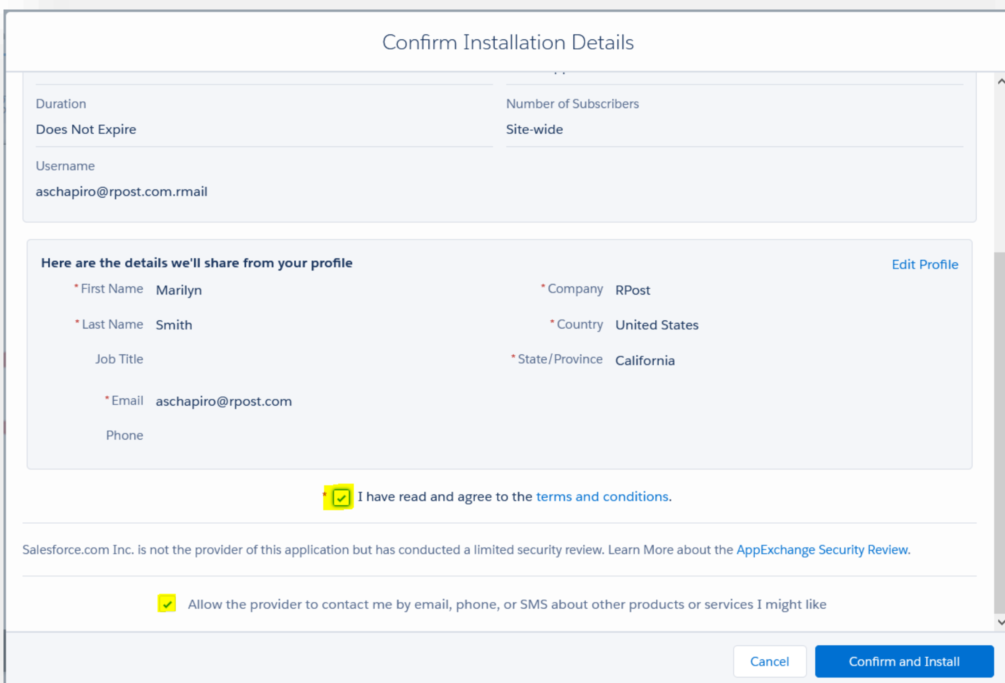
Step 1: To install application in Developer, Sandbox or Production Salesforce org, a user with administrative rights logs into Salesforce.com and access our AppExchange listing and click the Get it Now button. You will be required to log in with your trailblazer profile.



Select to install in Sandbox or Production accordingly and log in to the Salesforce instance where you want to install the application.

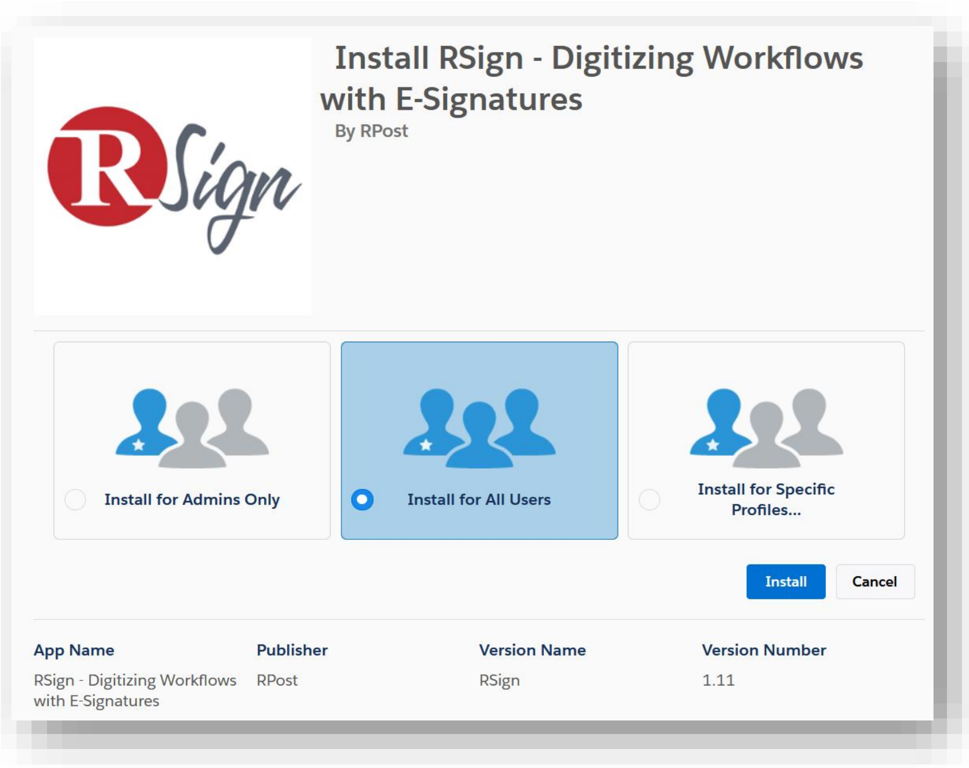


To proceed with installation it is necessary to check the box to agree to the terms and conditions and the other



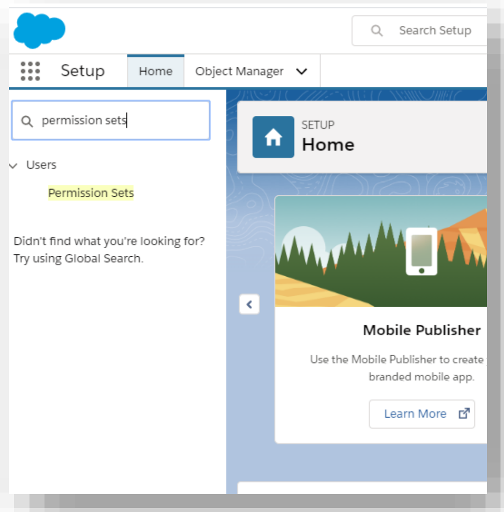
box at the bottom of the screen to opt in to our communications (optional)

Step 2: After login, the Salesforce Admin ("Admin") will see the installation screen shown below. Based on requirements, the Admin can assign RSign app visibility to Admins, All Users, or Specific Profiles. After selecting, you will click the Install button.

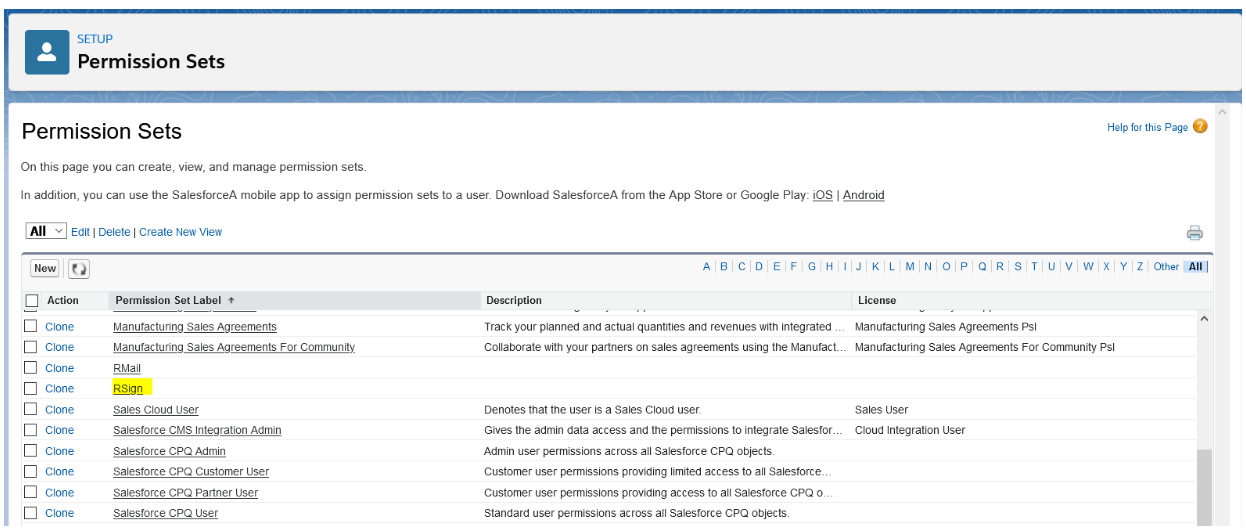


Step 3: Once the application has been installed, you need to assign **Permission Sets to Users**. Following are steps to assign Permission Sets:

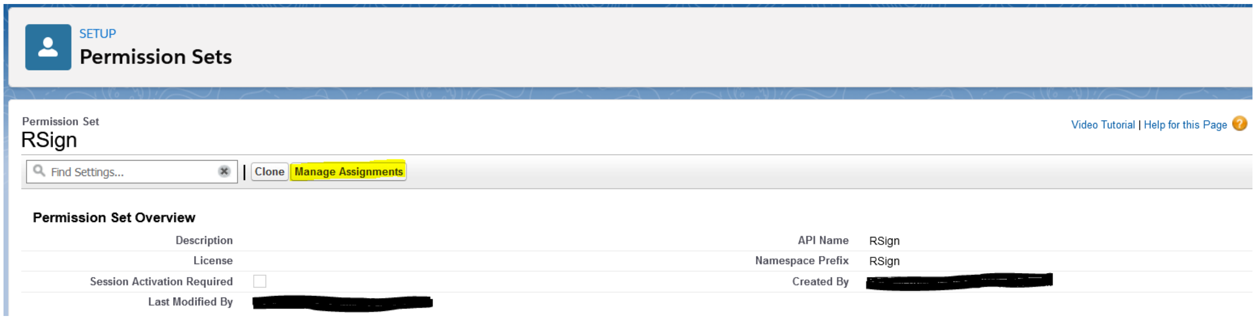
a. Go to Setup and search for "Permission Set" in quick find.

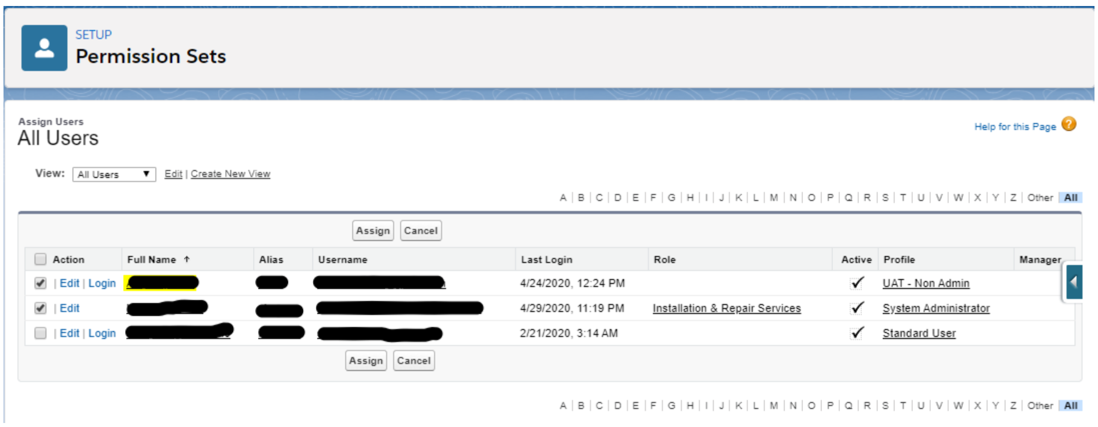


Check for Permission Set Label with name "RSign" and click on it.



b. At the top of the Permission Set screen you will see the "Manage Assignment" button, click on that and on next screen you will see "Add Assignment" button, click on that button and select the Salesforce users to whom you want to assign RSign to.





2.2. Configuring Company and User Settings in RPortal (RSign Admin Portal)

There are four important settings to consider in RPortal:

1. **Company Local Time Zone:** This is important to configure so that the Registered Receipt and message status local time information is properly captured and distinguished from the UTC timestamps.
2. **E-Sign:** E-Sign: If you are using RForms, RSign E-Sign Tags, or have certain e-sign requirements, these can be adjusted inside RPortal for the company.
3. **E-Security**: If you prefer certain email encryption behavior that is not available inside the RSign for Salesforce.com interface, visit RPortal to make these adjustments.
4. **Service Language:** If you prefer the emails sent out to recipients and the Registered Receipt emails to be returned in a language other than English, this may be configured inside

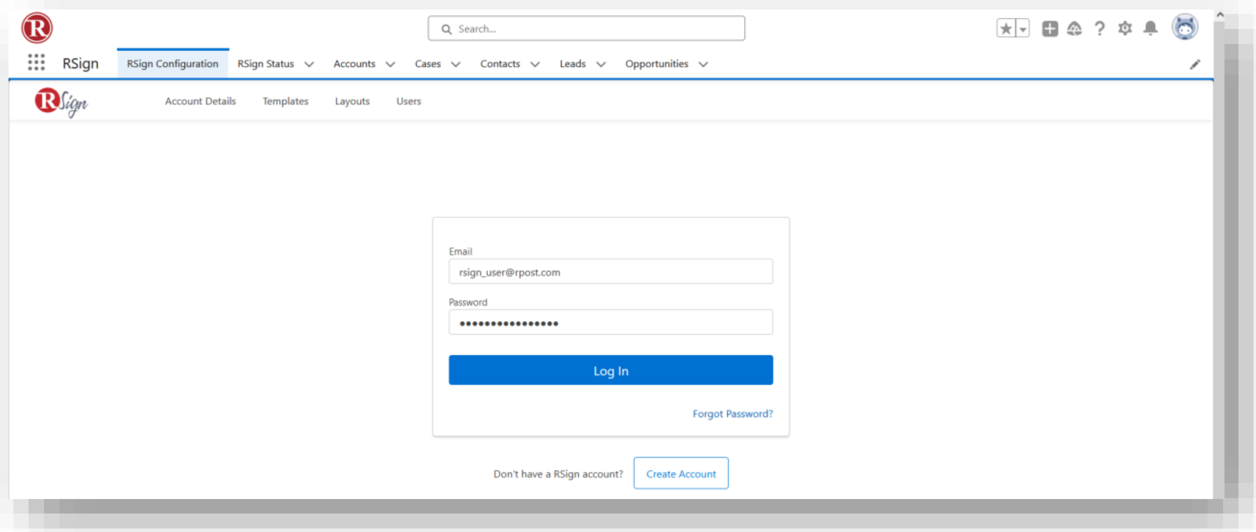
2.3. Installing Advanced Email Encryption and Proof Functionality for Salesforce

In addition to RSign for Salesforce there is an advanced email encryption and Registered Email e-delivery proof app called **RMail**. For more information on RMail, contact your account manager. To explore the RMail for Salesforce app, you may use the instructions provided by the RMail team.

3. Configuration: Accounts, Users, Layouts, Objects

3.1. Login Page

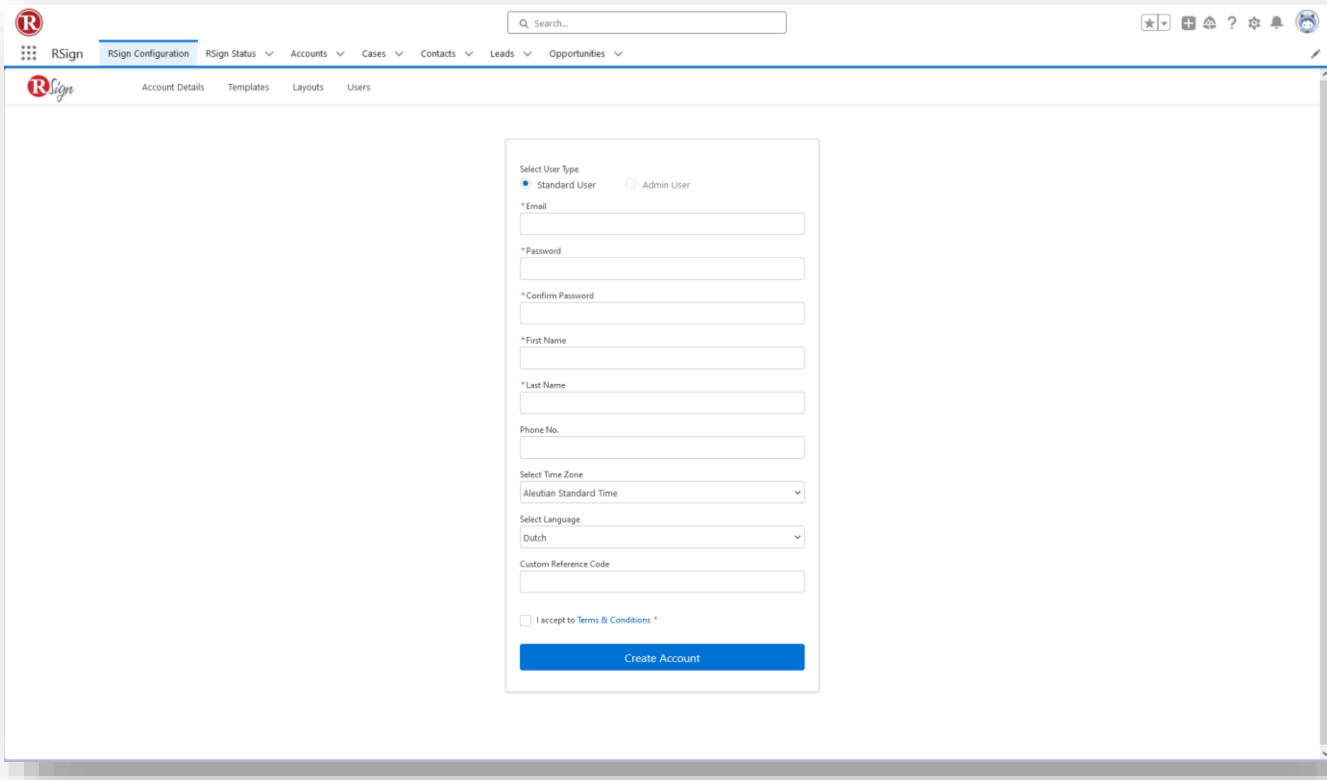
RSign for Salesforce adds an RSign view, and also an RSign Configuration and RSign Status tab that may be added to other views. RSign recommends adding the RSign Status tab to main sales or business views. The RSign Configuration tab is for end-user log-in to RSign to connect their user account prior to first use.



The User/Admin can login to RSign by using login screen with RSign credentials.

1. User/Admin can login to RSign by using login screen with RSign credentials.
2. Once the user logs-in, the user will be redirected towards an account details screen. **All RSign settings tabs will be visible to only the Salesforce user whose profile is system administrator.** For non-admin users all tabs will be invisible except the user administration settings and user configuration (log-in) tabs.

3.2. Admin Create Account Page

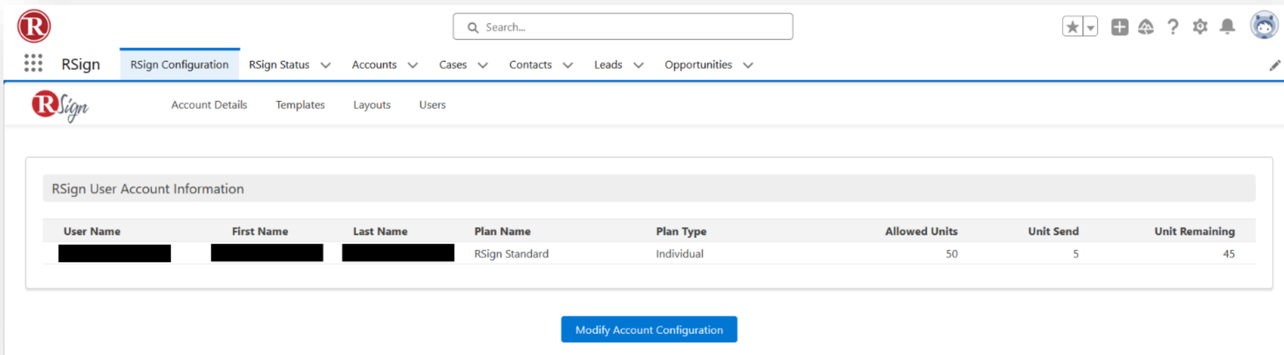


The User or Admin can create new RSign account using the Create Account button on the login page.

1. When registering a new user, it is imperative the right user role is selected (standard user vs. administrator).
2. If the Admin or User does not have RSign account, then User can register an RSign customer account using the Create Account button present on the login page.
    - **a.** The User (customer admin) needs to fill all the required information to create account, and accept the Terms & Conditions. After this, a new account is created for User (customer admin). Once the account is created for User, the User will be redirected to a login page. In the user already exists, the User will get a message indicating such.
    - **b.** After submission of all details, the user will get email containing an activation link. On click of the activation link and completing the process, the user can login successfully. If the activation process is not complete, on login, the User will get error message indicating activation needs to be completed.

3. If the customer admin is already an RSign or RSign customer (in RPortal), the customer administrator must request from their account manager their customer reference code – entering this code will connect the Salesforce application to their exising RSign or RSign customer account.

3.3. Account Details Page



Detailed information of a logged-in RSign User/Admin will be displayed in Account Details.

1. Account Details page contains all the information of a logged-in RSign User/Admin such as their Username, First name, Last name, which type of plan name, plan type (individual plan or shared volume plan), unit max per plan period (per month or per year depending on whether a monthly or annual unit plan), units sent per plan period, and remaining available units per plan period.

2. Modify Account Configuration only provides the User options to modify their password.

3.4. Templates

There are three parts of templates, Selecting Templates from the RSign account to be available in Salesforce, managing those templates, and creating OneClick™ templates with mapped pre-flll and/or back-fill data.

Select Templates

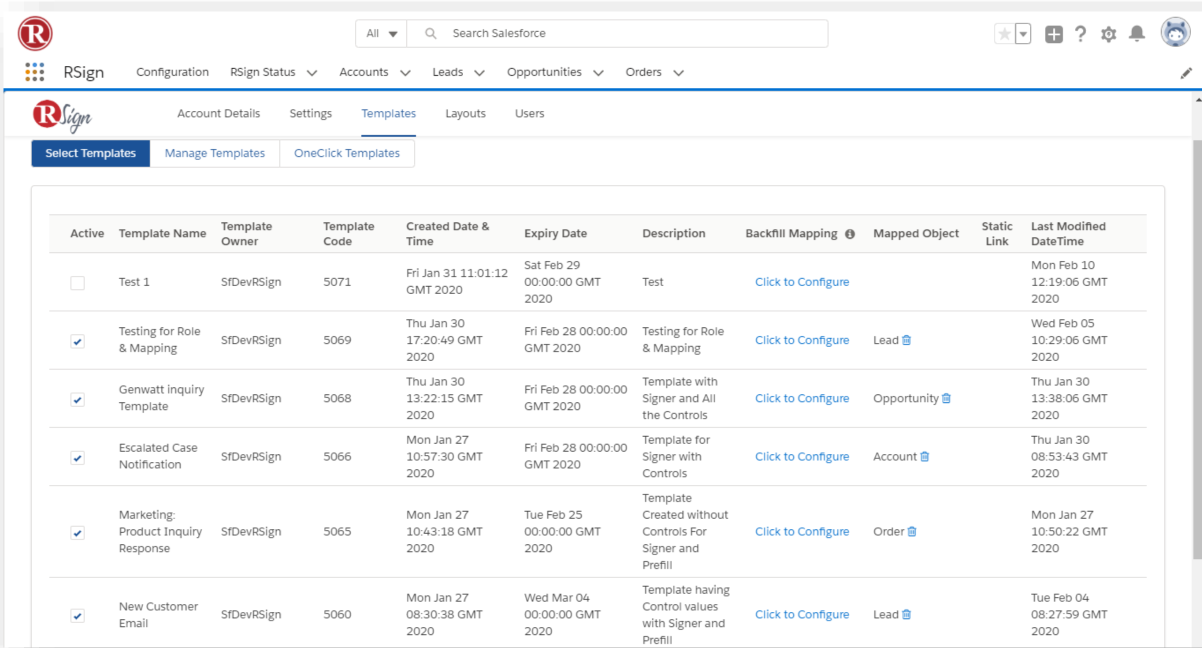
1. The list of all templates will be displayed here with all the details such as Template name, Template owner created & last modified date, to which object that templates are mapped. This information is fetched from the RSign system. It will display templates created in Salesforce.com app or templates created in the RSign web app.

2. Only the selected active templates will be available while sending from any Salesforce object detail.

3. The Backfill mapping column is used to configure the mapping of RSign to Salesforce objects with their fields. Backfill configurations can be deleted by using the “Delete icon” beside mapped object name.

4. OneClick link “Click to Configure” opens a modal where the User can select the Object and once the object is selected, a control table will be displayed where the user can assign. The User can map the field from dropdowns. On click of the save button the mapping will be saved, and it will be used for importing Control Data from RSign to Salesforce and for updating the record details based on the control values once the e-sign envelope is in its Completed State.

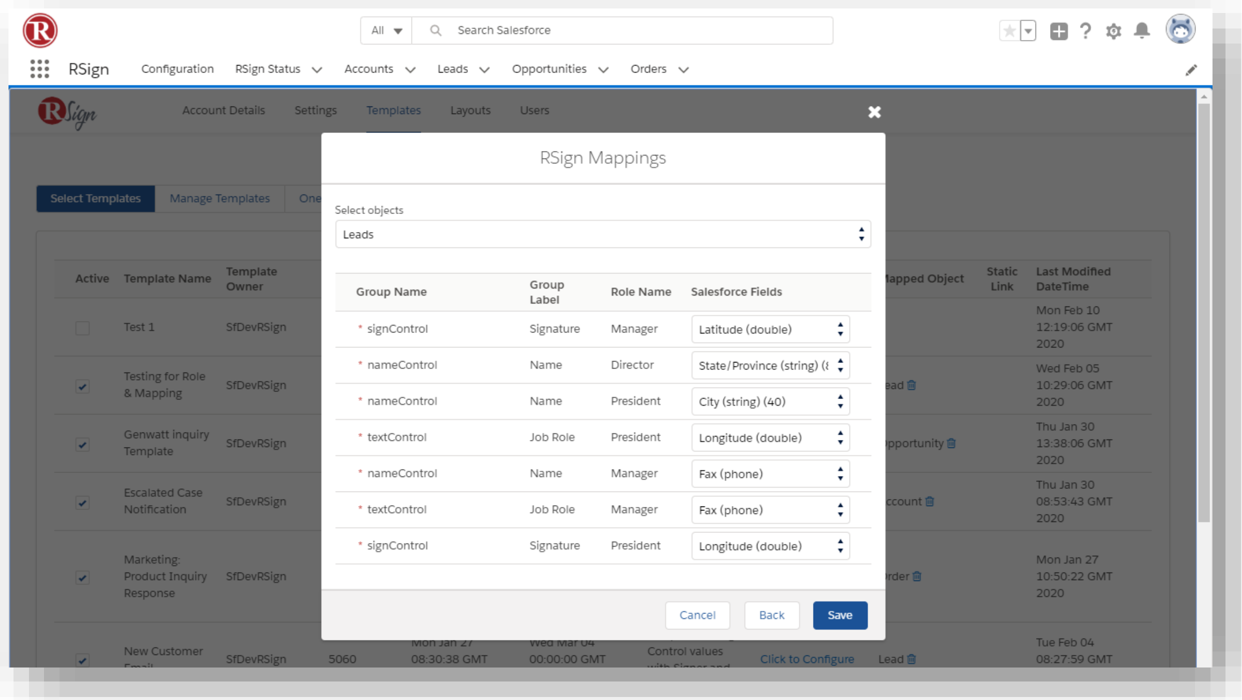
5. Static link column is mainly for copying the static link of templates if the user wants to create an email tempate that contains the static link to a set e-sign template or form. TIP: you can send email templates encrypted with the **RMail for Salesforce app**, and those templates can contain a static RSign link (ask your account manager for more details).



Active	Template Name	Template Owner	Template Code	Created Date & Time	Expiry Date	Description	Backfill Mapping	Mapped Object	Static Link	Last Modified DateTime
☐	Test 1	SfDevRSign	5071	Fri Jan 31 11:01:12 GMT 2020	Sat Feb 29 00:00:00 GMT 2020	Test	Click to Configure			Mon Feb 10 12:19:06 GMT 2020
✔	Testing for Role & Mapping	SfDevRSign	5069	Thu Jan 30 17:20:49 GMT 2020	Fri Feb 28 00:00:00 GMT 2020	Testing for Role & Mapping	Click to Configure	Lead		Wed Feb 05 10:29:06 GMT 2020
✔	Genwatt inquiry Template	SfDevRSign	5068	Thu Jan 30 13:22:15 GMT 2020	Fri Feb 28 00:00:00 GMT 2020	Template with Signer and All the Controls	Click to Configure	Opportunity		Thu Jan 30 13:38:06 GMT 2020
✔	Escalated Case Notification	SfDevRSign	5066	Mon Jan 27 10:57:30 GMT 2020	Fri Feb 28 00:00:00 GMT 2020	Template for Signer with Controls	Click to Configure	Account		Thu Jan 30 08:53:43 GMT 2020
✔	Marketing: Product Inquiry Response	SfDevRSign	5065	Mon Jan 27 10:43:18 GMT 2020	Tue Feb 25 00:00:00 GMT 2020	Template Created without Controls For Signer and Prefill	Click to Configure	Order		Mon Jan 27 10:50:22 GMT 2020
✔	New Customer Email	SfDevRSign	5060	Mon Jan 27 08:30:38 GMT 2020	Wed Mar 04 00:00:00 GMT 2020	Template having Control values with Signer and Prefill	Click to Configure	Lead		Tue Feb 04 08:27:59 GMT 2020

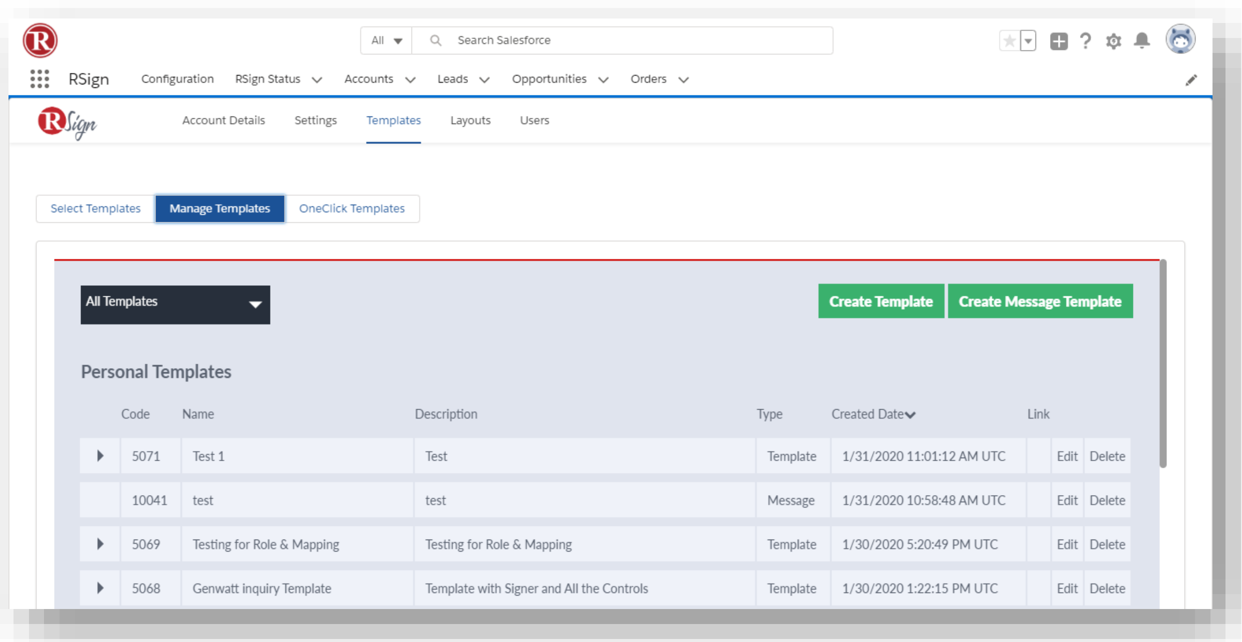
View or Edit Backfill Mapping for Templates

The administrator can set data from recipient filled forms and documents to pre-fill or backfill from or into mapped Salesforce fields to then trigger follow-on Salesforce activities. This is a powerful feature. View or edit current mappings for a template here by clicking the Backfill Mapping Click to Configure link.



Manage Templates

The administrator can manage templates (view, create, edit, delete) from within the Salesforce interface. A parallel view is available within the RSign web app.

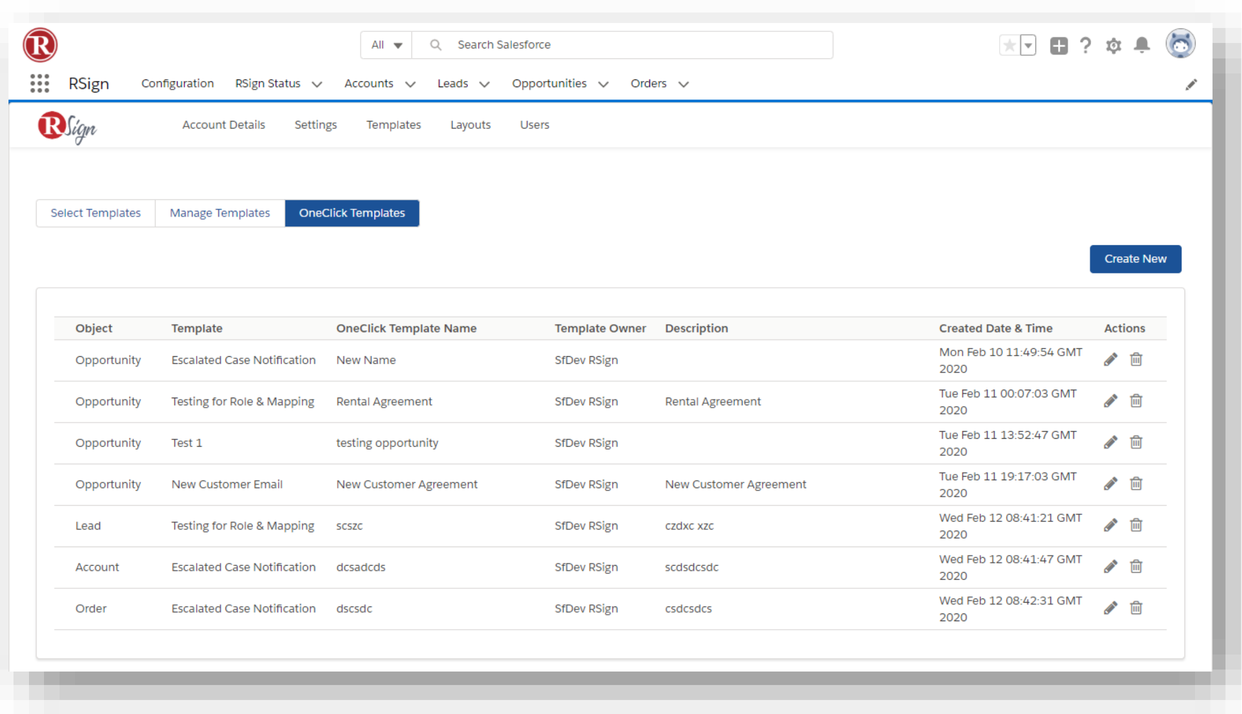


OneClick Templates

Creating OneClick Templates allows the administrator to set up a template, map pre-filling of data from Salesforce fields into the template en route to the recipients for fill and sign, and map backfilling data that the signers fill in, back into Salesforce fields. Reminder emails and other parameters can be set with the settings related to the template.

The benefit of using OneClick is the users can simply select OneClick RSign and select the template name, and everything else is automated.

The administrator can manage OneClick templates in this interface.



With the **Create New** button, an administrator can create a new OneClick Template with the following steps.

1. In the **Manage Template tab,** upload a document or form create a template.
2. In the **OneClick Template tab**, click **Create New**
    a. In the **Template Details**, find the appropriate previously created Template
    b. In the **Pre-fill Mapping area**, use the pull downs to map any **pre-fill fields** (data from Salesforce to prefill form before sending for fill and e-sign).
    c. Add any designated **recipient roles** and **order of signing**, and sequential or first come.
        i. If sequential, the second signer will not be invited until prior signers complete.
        ii. The Prefill in the Recipient view is an email that is first sent to a human to manually pre-fill certain fields in the form before it is sent to the first signer. NOTE: This is

different from the Pre-fill Mapping option which automatically populates the template based on predefined Salesforce field values.

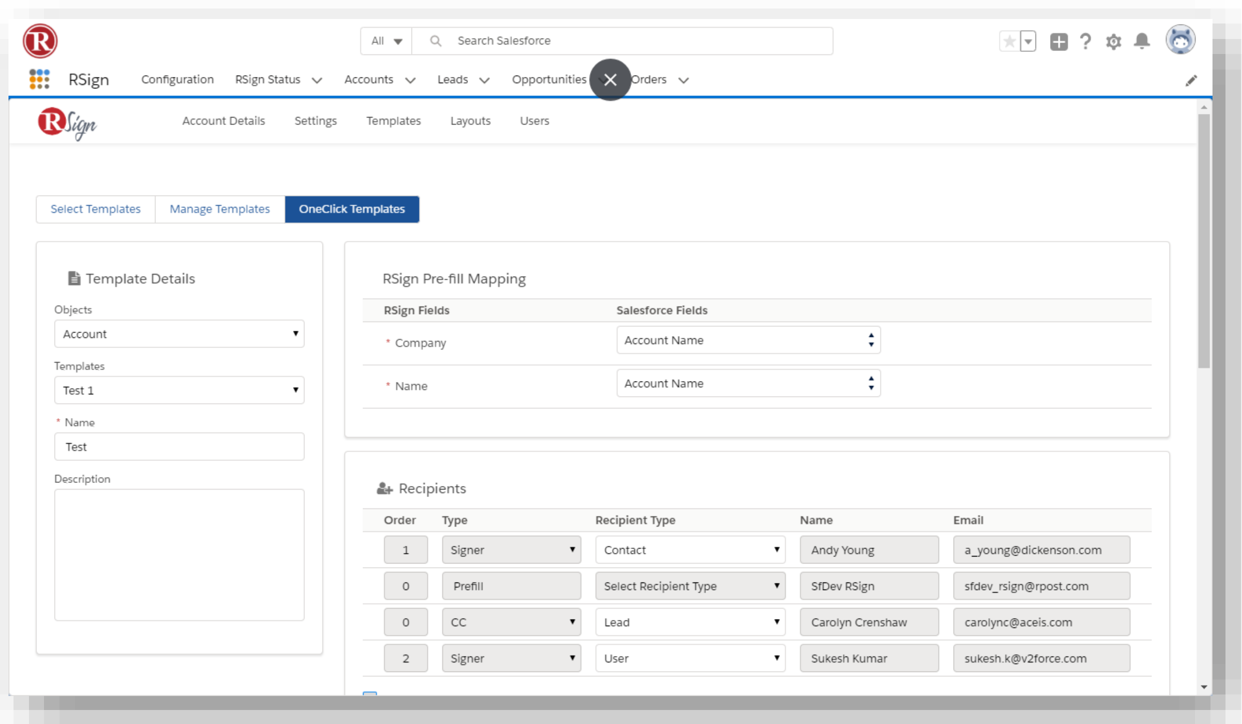
iii. CC can be preset to an individual or left open – these people will not be able to fill and sign.

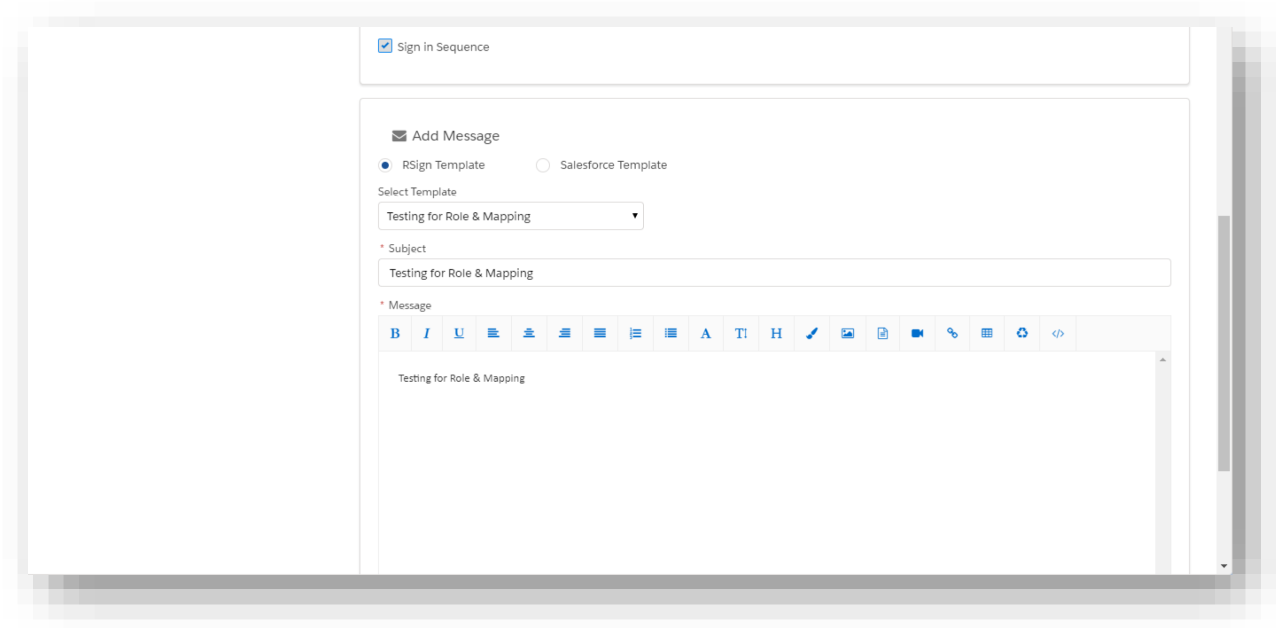
iv. Signer – one might pre-set a second signer or any signer with an individual address, for example, so a manager always gets the completed forms to add a final counter signature.

d. In the **Add Message** area, one can use the RSign message (created when creating the template) or associated the message with a predefined Salesforce template.

   i. Once can modify the template here and save, or a user can further modify the template before sending.

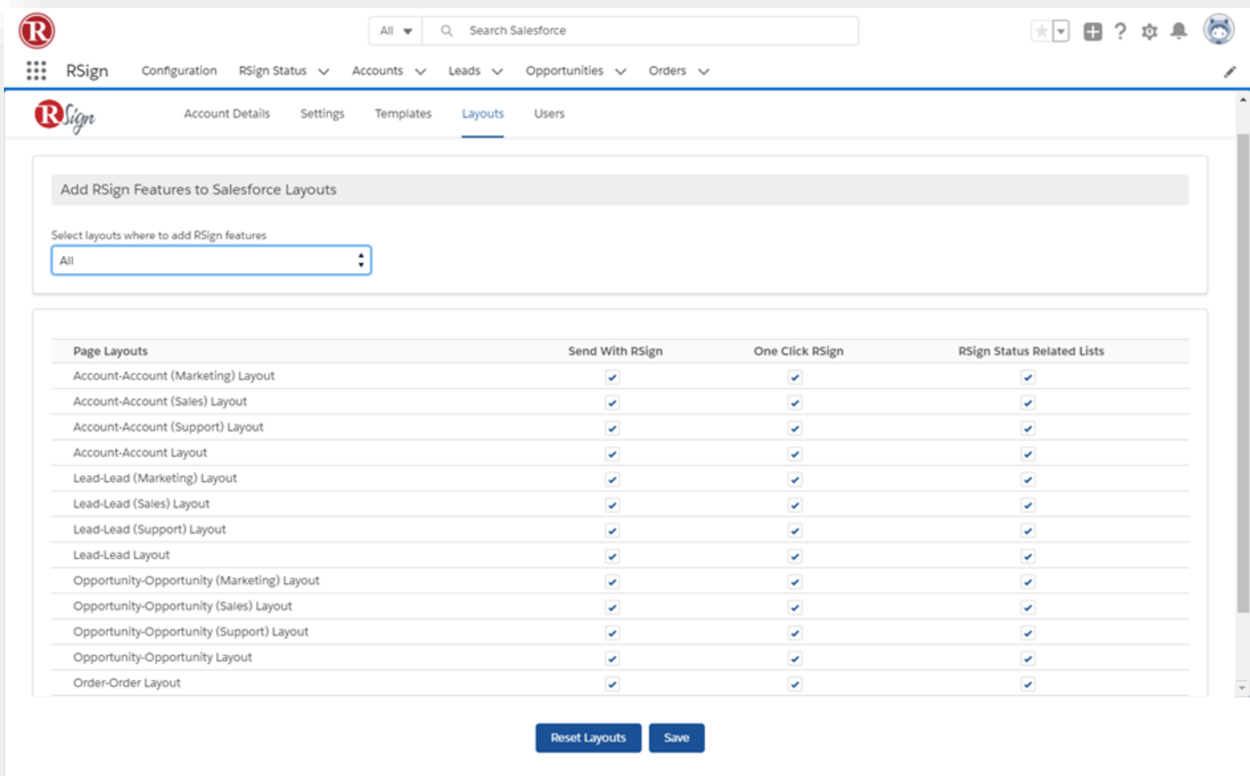
e. To add **Backfill Mapping** to the template, **after this is set up, go to the Select Template section**, find the template, and use the Backfill Mapping column, Click to Configure link.





3.5. Layouts

The Admin can add RSign features to different Salesforce layouts and objects. RSign Buttons means the send options, and RSign Status means the retrieval of message delivery status data and receipt emails.



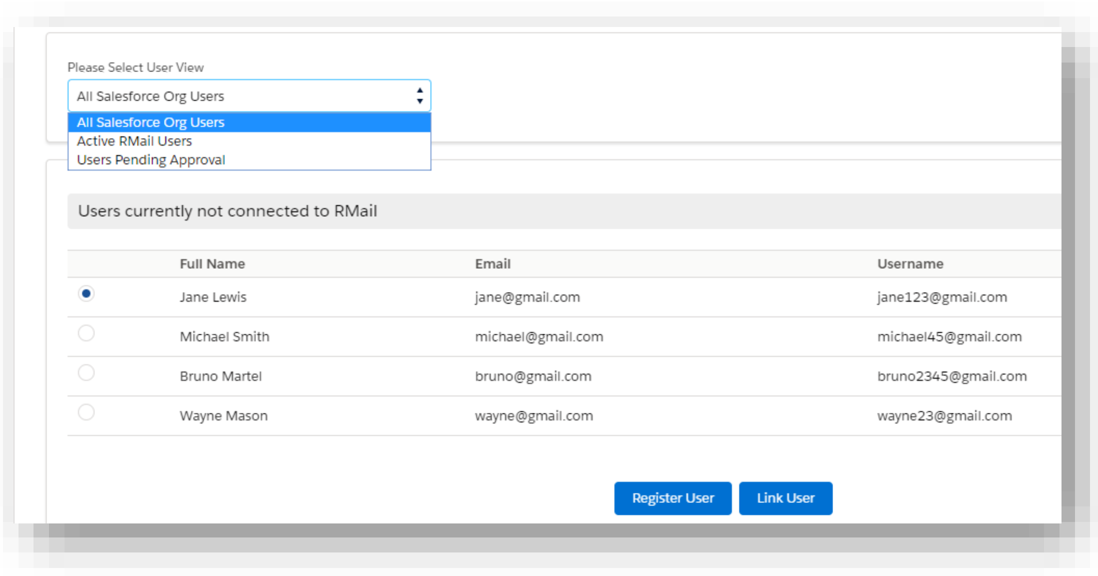
3.6. Users

All the company's Salesforce Org users, active RSign users, and users pending RSign approval will be displayed on Users tab. All Salesforce Org Users are users who do not have any RSign Account or who have an RSign account but are not yet associated in with their salesforce user.

For users not yet registered in RSign with a service plan can register here for the default service plan and then contact their account manager to upgrade, or the administrator can upgrade them to the appropriate available plan. Users that are registered with an RSign plan can associate their plan to their Salesforce user.

Active RSign User: User who has an RSign account that is linked to their Salesforce user. The admin can de-active the active RSign user by using Deactivate User button.

User Pending Approval: Users will be displayed here if their Salesforce account is not yet linked to their RSign account.

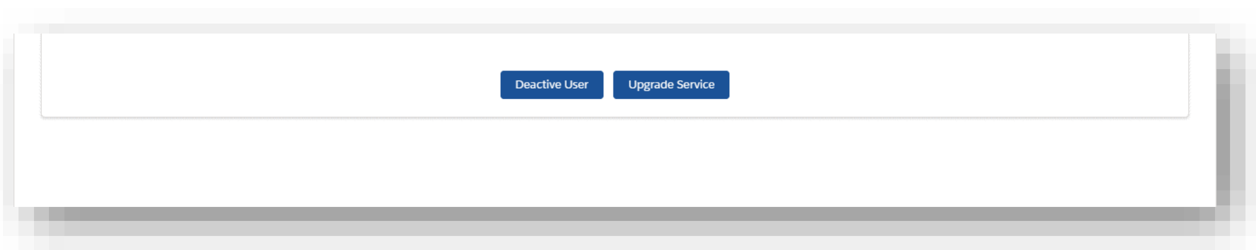


Remind User: sends email to respective user that their approval status is pending (and needs to be linked to their Salesforce.com user ID.

Register User: User can register for an RSign account if the user does not already have an RSign account. The User will be redirected to Create Account page with pre-populated details values.

Link User: If the user has an RSign account that is not linked to their Salesforce org account, then by clicking on Link User, the user will be redirected to Link User page where User's username will be prepopulated and on-click of Link User button, their RSign account will be linked to their Salesforce Account.

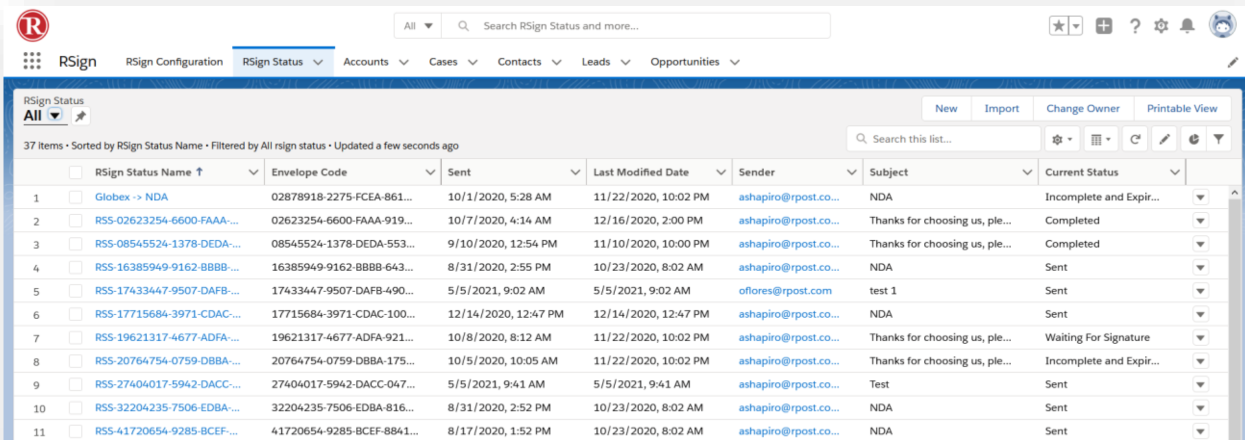
Upgrade Service: This sends an email to begin a process to upgrade a user's RSign service plan to a plan with higher volume or more capabilities.



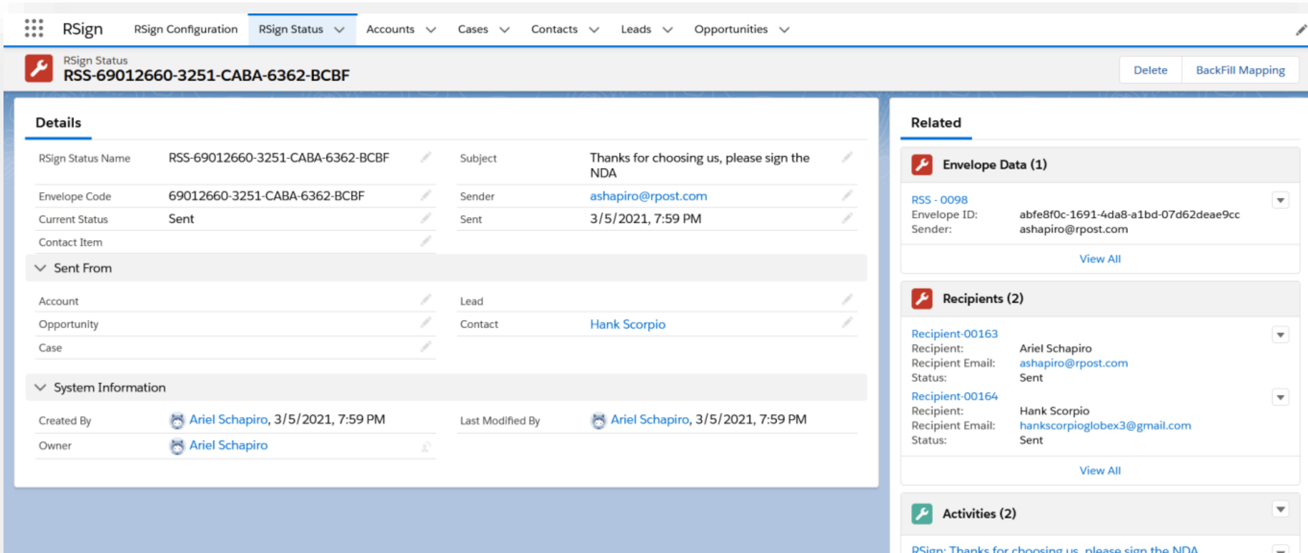
4. RSign Status Tab for Users

Users can see RSign data that has been backfilled into specific mapped fields (see Backfill Mapping section) or they can view in the RSign Status tab.

The RSign Status tab has columns that may be configured by the Salesforce administrator in the normal way, to prioritize the information that is important to the user in the view. This below is an example before any user customization.



By clicking on an RSign Status Name record, one can view the details of that record, and can set follow on activities from that record detail fields.



RSign status tab will have RSign Status record generated after a user sends an RSign email. The RSign status contains details like tracking no., sender's address, subject, delivery status, from which salesforce object the email has been sent, and more.

- **Completed:** The completed document is prepared as an authentication record in the form of a digitally signed PDF and is accessible. More information on E-Sign Authentication is in the RSign support center.

RSign status tab has some additional options in the upper right.

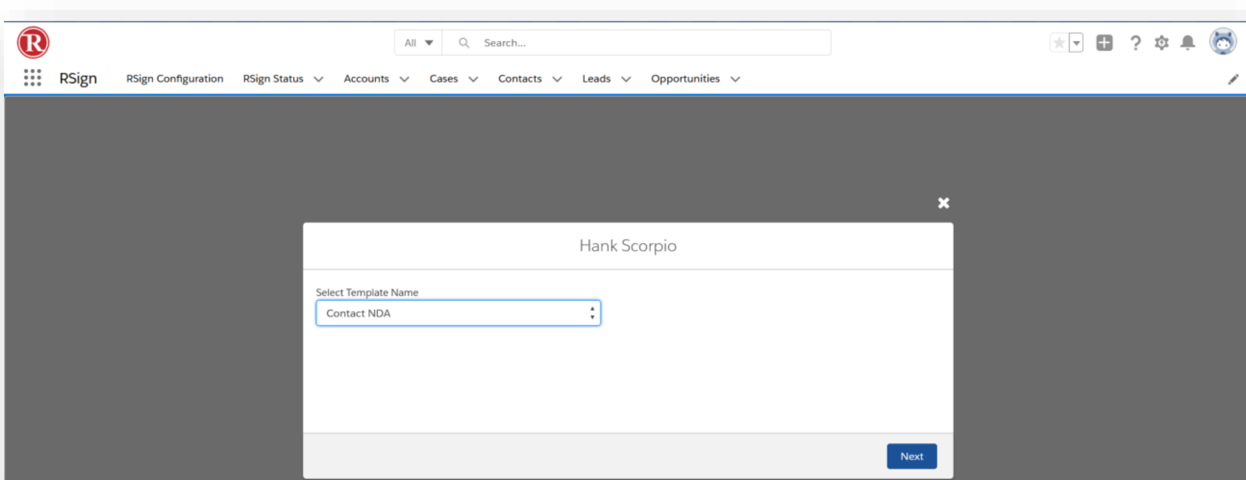
Refresh: RSign status information is automatically updated each hour.

  - If a user needs to generate more frequently or would like to force the latest RSign Status information to display, the User can click the "Refresh" button in the upper right of the view.
  - This will refresh RSign Status and retrieve any records that have not yet been synchronized.
- **Backfill RSign Data**: On-Click of Backfill RSign Data, the user will be redirected to a page that shows the mappings of the Objects where RSign Status information is populated into Salesforce field.

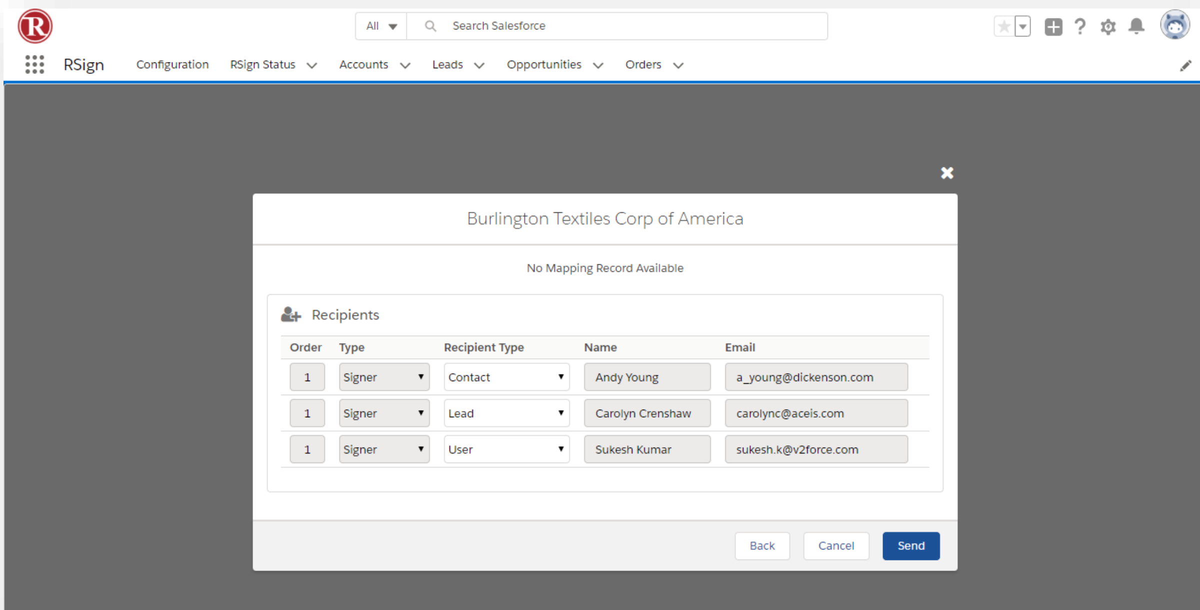
5. *User Automation: Send with OneClick™ RSign*

The most efficient way to use RSign for Salesforce is with OneClick™.

1. In the Salesforce record, user selects "Send with OneClick RSign" in the upper right menu pull down.
2. A window opens, user selects the appropriate template from a pre-populated list of prepared OneClick templates.



3. If any RSign field is not mapped to Salesforce field, then that field will be highlighted with red color indicating that there is no mapping for particular control. This can then be mapped ad-hoc.
4. User can verify recipients or select recipients from Salesforce objects such as contact, opportunity, Lead, Record Owner and by selecting “Add New“, the user can manually enter name and valid email address of an additional or new recipient. The Sign in Order for the envelope depends on what was set up while creating the RSign Template.
5. Use clicks SEND if everything looks proper, and the message template is pre-filled according to mappings, sent, and after signoff, backfilled into the Salesforce record, automatically.



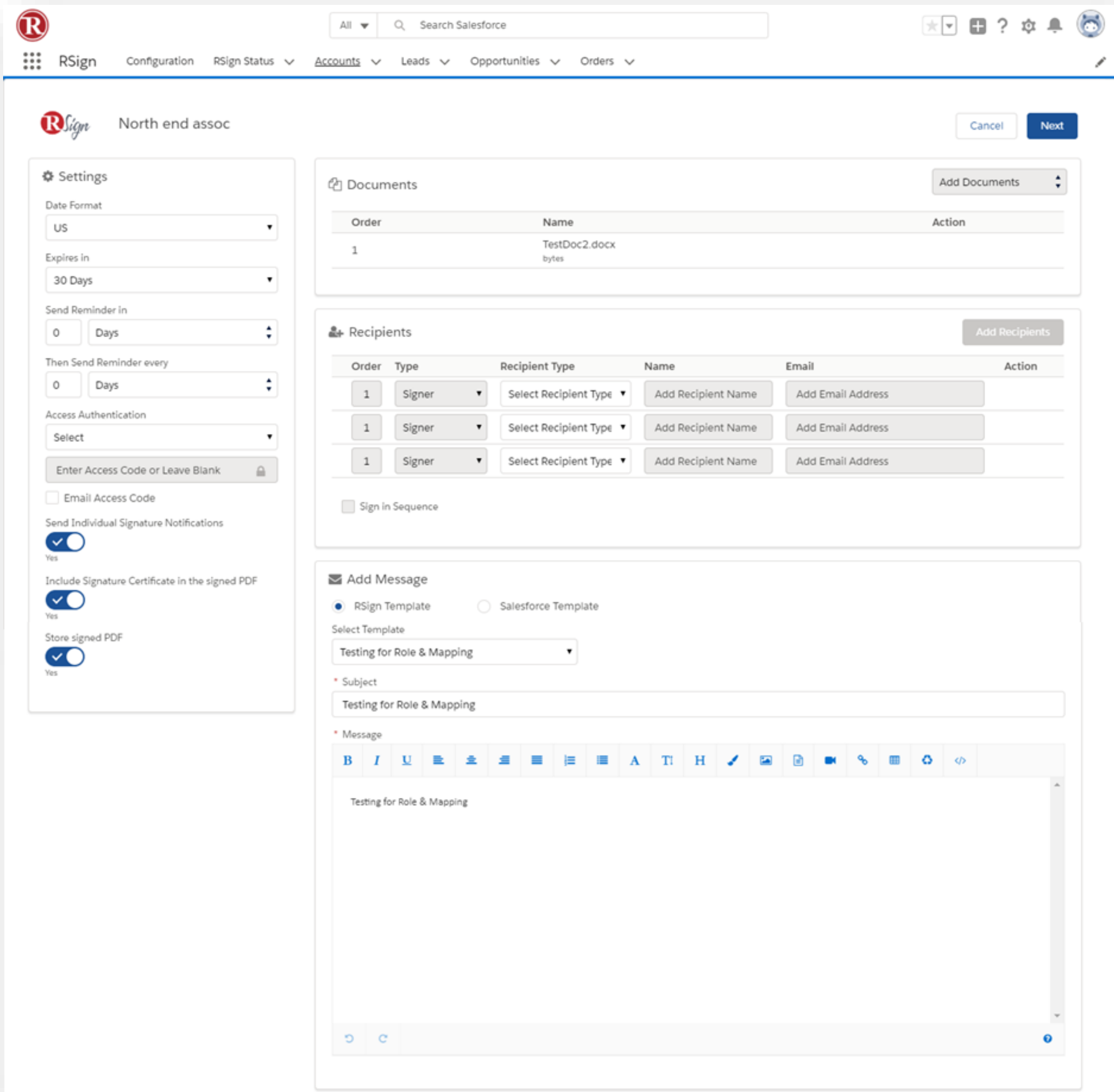
6. *User Manual: Send with RSign (with or without Pre-Defined Templates)*

A user can create an envelope by adding documents from an attachment list or from desktop attachments or you can choose RSign template or RSign Rule.

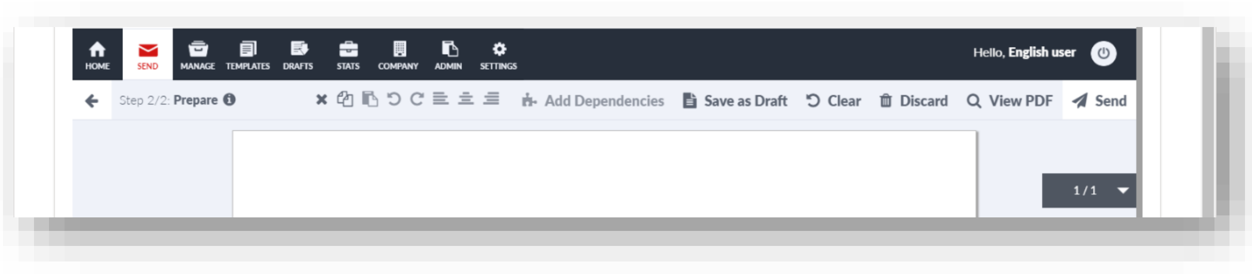
If the user is not using a template, they can:

1. Attach a document.
2. Add one or more recipients on clicking Add Recipients, the User can select Recipients from Salesforce objects such as contact, opportunity. The User can give an order for signing of document by clicking Sign in Sequence checkbox.
3. Select message templates from RSign Templates and Salesforce Templates. Salesforce Templates will come from the Salesforce pre-defined email templates
4. Set the settings to change any default settings.

After this, they click NEXT to drag-and-drop fields and rules into the document and send for signoff.



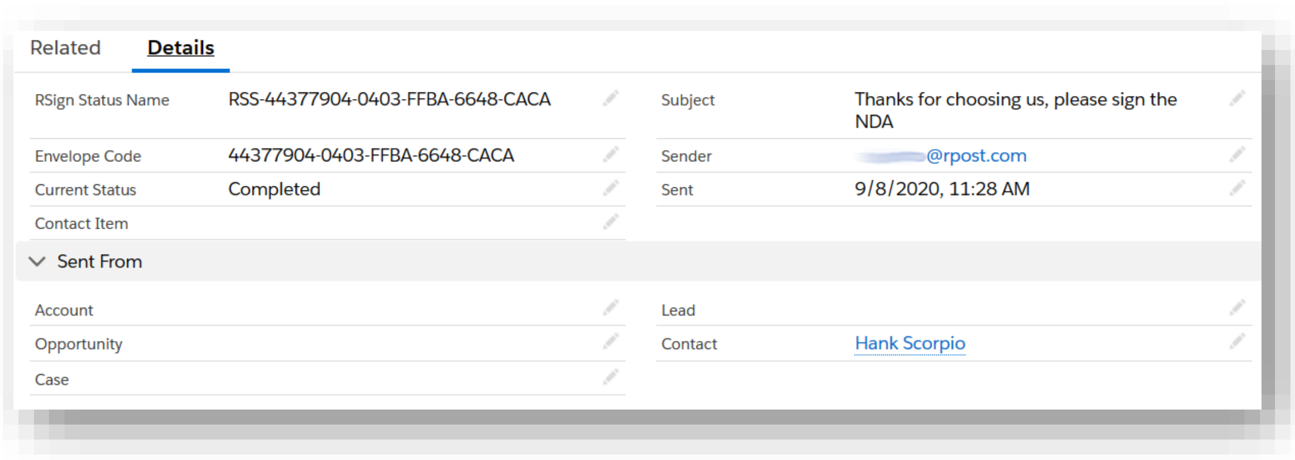
After clicking the NEXT button, the prepare envelope will be shown for the user to prepare the envelope fields for signoff if no template has been selected.



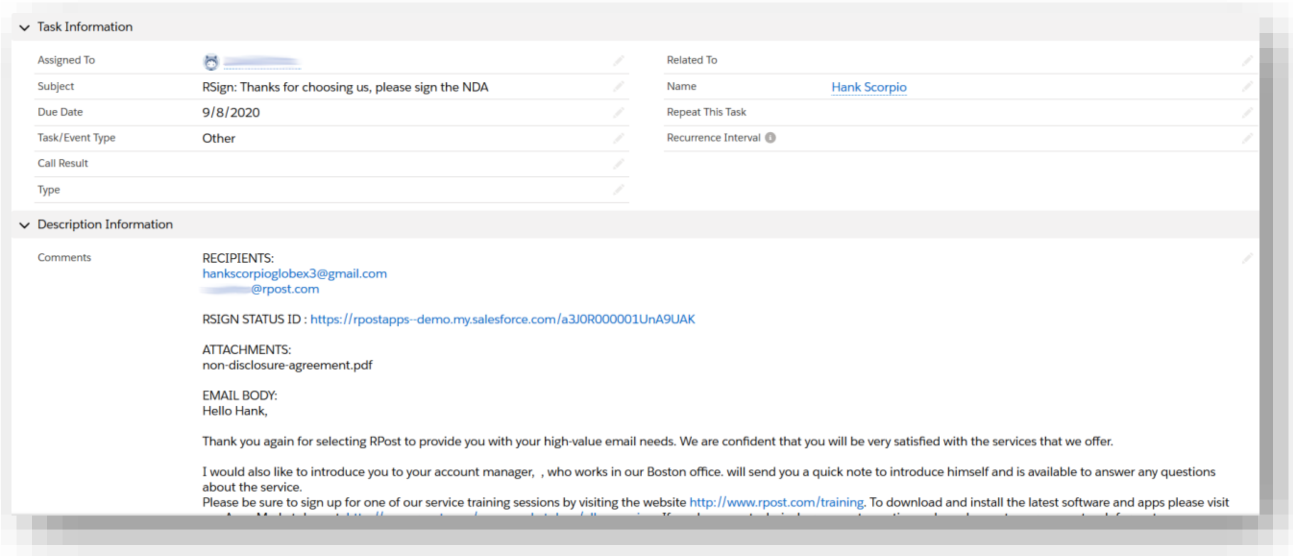
Then click SEND to send for recipient signoff.

7. RSign Status and Activity History

After sending an email communication through the RSign for Salesforce application, an RSign Status record will be created. This record contains all the tracking information related to the RSign message that was sent, like the sent time, recipients and the Salesforce record from which the message was sent.



An Activity History record will also be created related to the recipients and the object the message was sent from. It will include the message subject, content and recipients.



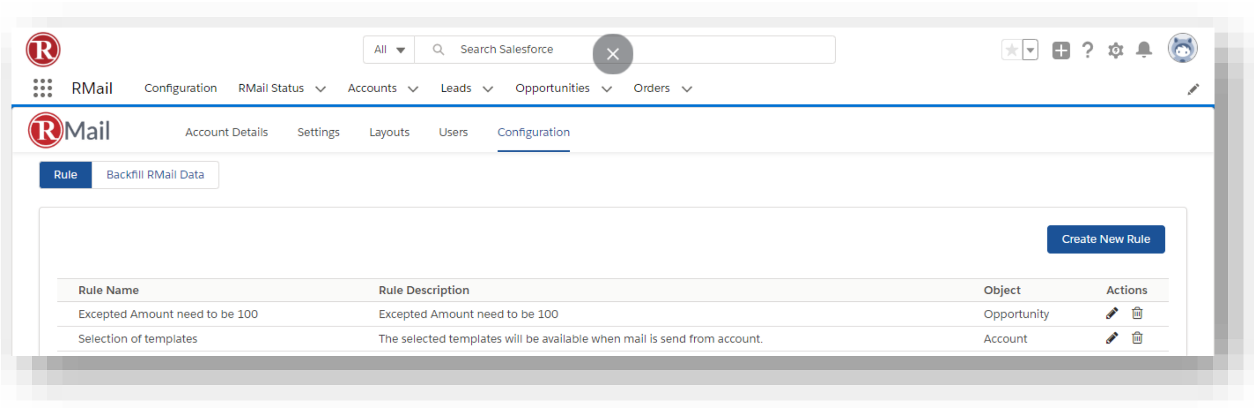
8. Sister App: RMail Policy-Based E-Sign or Encryption E-Sign Link Sending

If one wants to automate the selection of e-signing based on message template, one can install the RMail for Salesforce sister application, and use the RMail Recommends™ function, which is a unique feature that lets an administrator configure **Rules** that create at **Trigger** that apply a **Policy** that causes an **Action**. View the RMail for Salesforce guide for more details. A summary of this RMail feature follows.

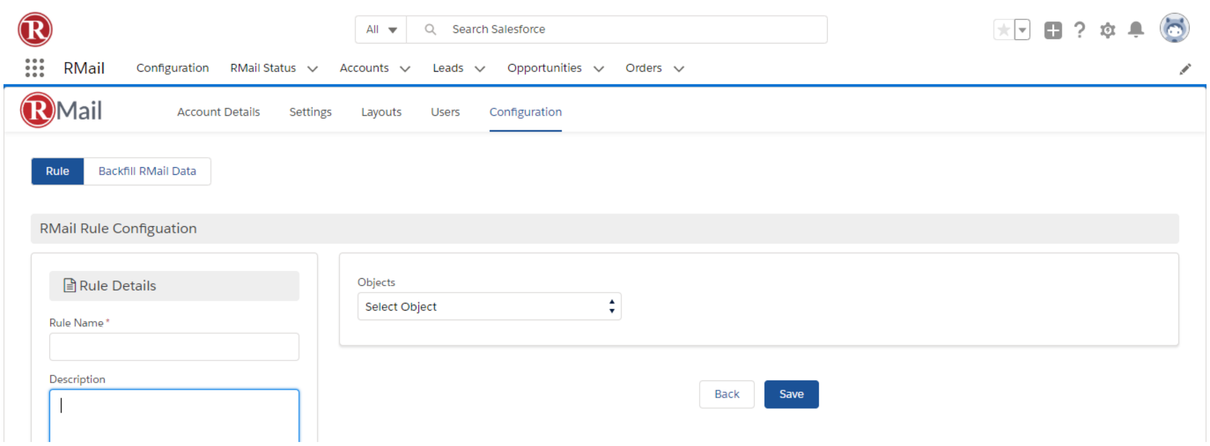
a. The **Trigger** of the policy and action can be based what is in an Object:
   i. **Field values**, or
   ii. **Message template** name.
b. The **Policy** is to indicate that the administrator:
   i. **Recommends** the user send with a specific feature with a recommendation message,
   ii. **Requests** the user send with a specific feature, with the feature pre-enabled, or
   iii. **Requires** the user send with a specific feature, with the feature locked on.
c. The **Action** is to send:
   i. **Encrypted** email,
   ii. **Registered** Email with e-delivery proof, or
   iii. **E-sign**, for recipient e-signature.

8.1. Rule for Policy-Based Sending

In the Configuration tab, select the Rule option.



In the Rule area, select the Create New Rule button.

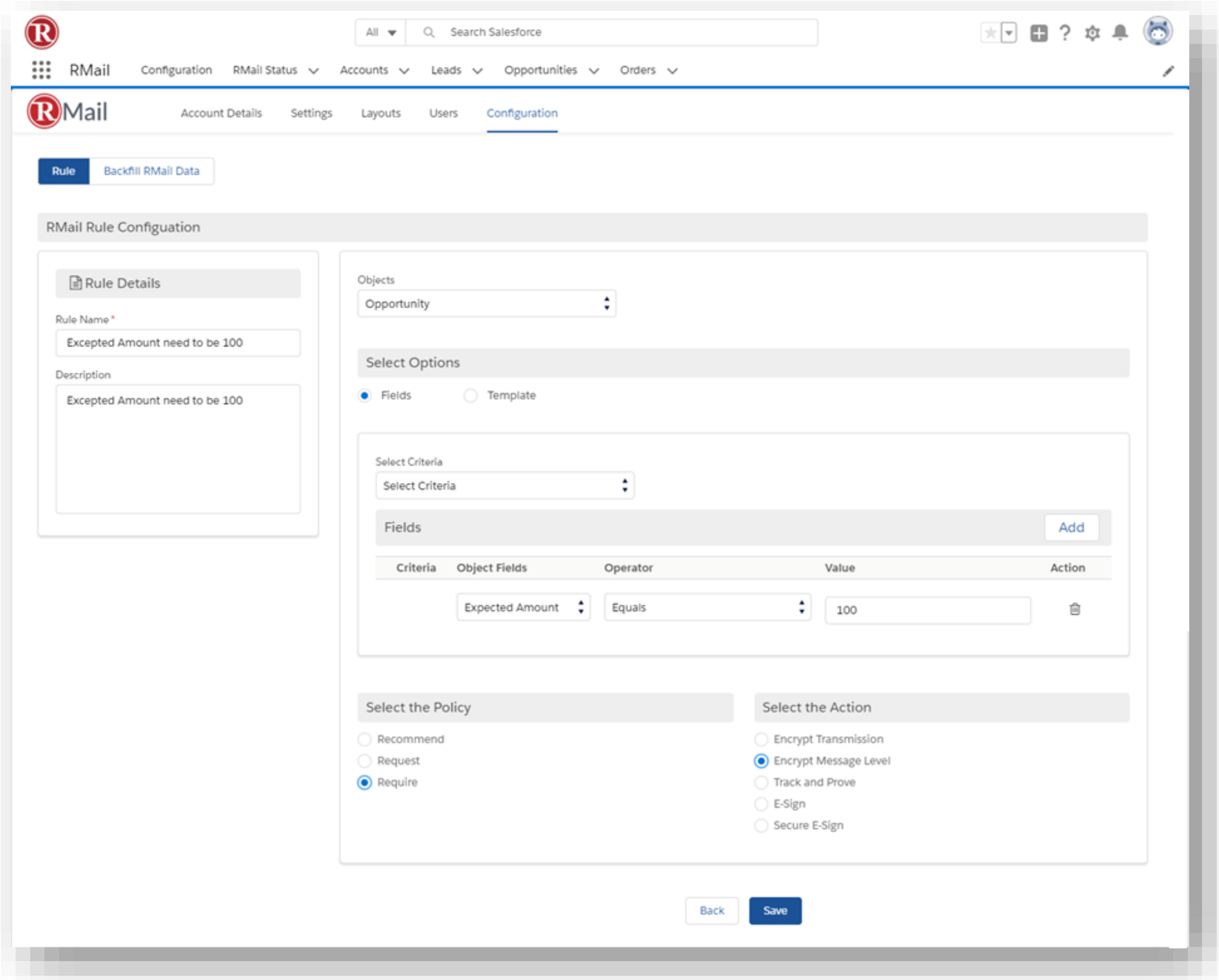


Add the Rule Name, Rule Description, and select the **Object** that will check for the Rule.

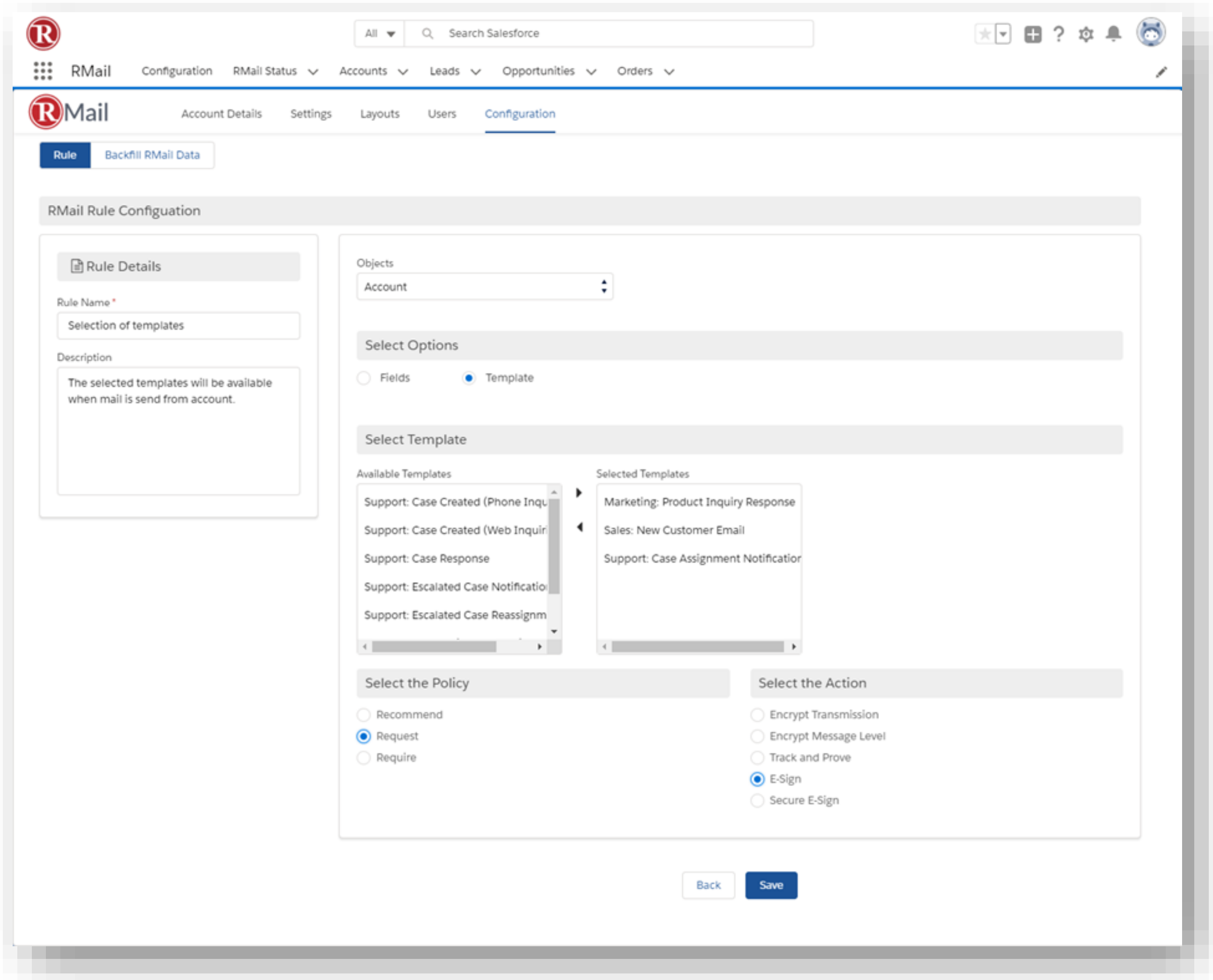
> *Note, a User can create only one rule for one object. Once the rule is created for one object, then next time when user creates the rule, that object will not be visible in drop-down list of selectable objects.*

c. Choose to **Trigger** the rule based on **field** values or a **template** name.
d. Select the **Policy** (Recommend, Request, or Require).
e. Select the **Action** (Encrypt Transmission, Encrypt Message Level, Track and Prove (Send Registered Email service), Send for E-sign, Send for Encrypted E-sign).
    i. *For more detail on what these actions do, visit the RSign support center at https://support.rpost.com .*

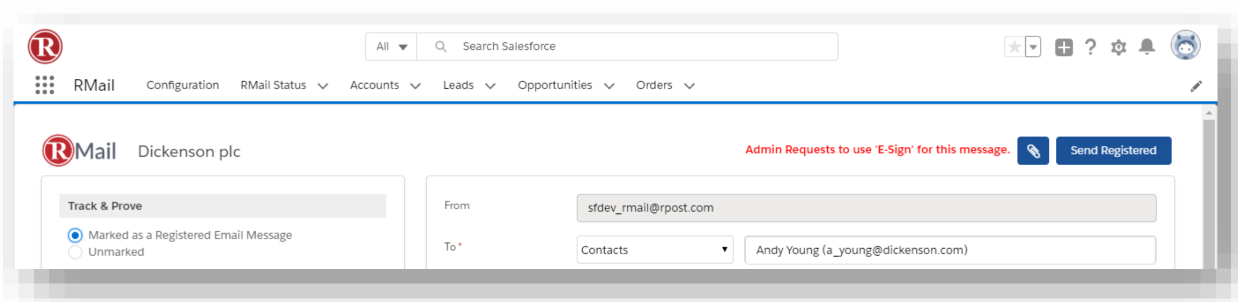
Trigger based on an Object's <u>Field Values</u>



Trigger based on an Object's Template Names



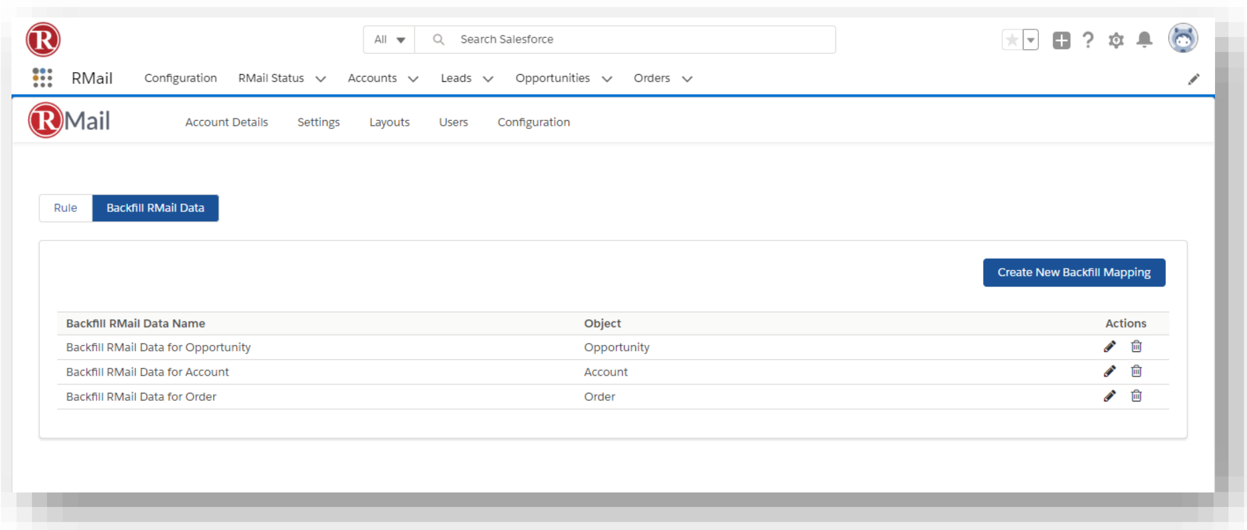
RMail Recommends policy displays in red next to the Send Registered button, alerts user before sending.



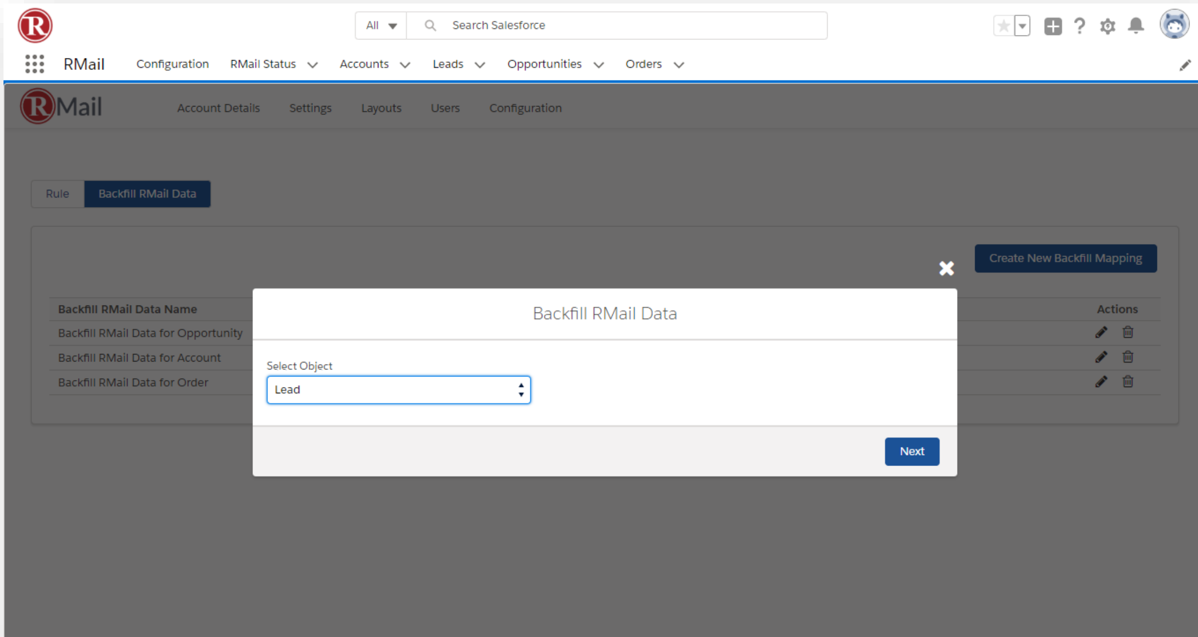
8.2.Configuration: Backfill RMail Data into Salesforce Object

A central part of this RMail for Salesforce app is backfilling message status information and Registered Receipt proof records into a Salesforce Object and mapped fields, so that the Salesforce administrator can trigger follow on workflows based on certain values being populated into mapped Salesforce object fields.

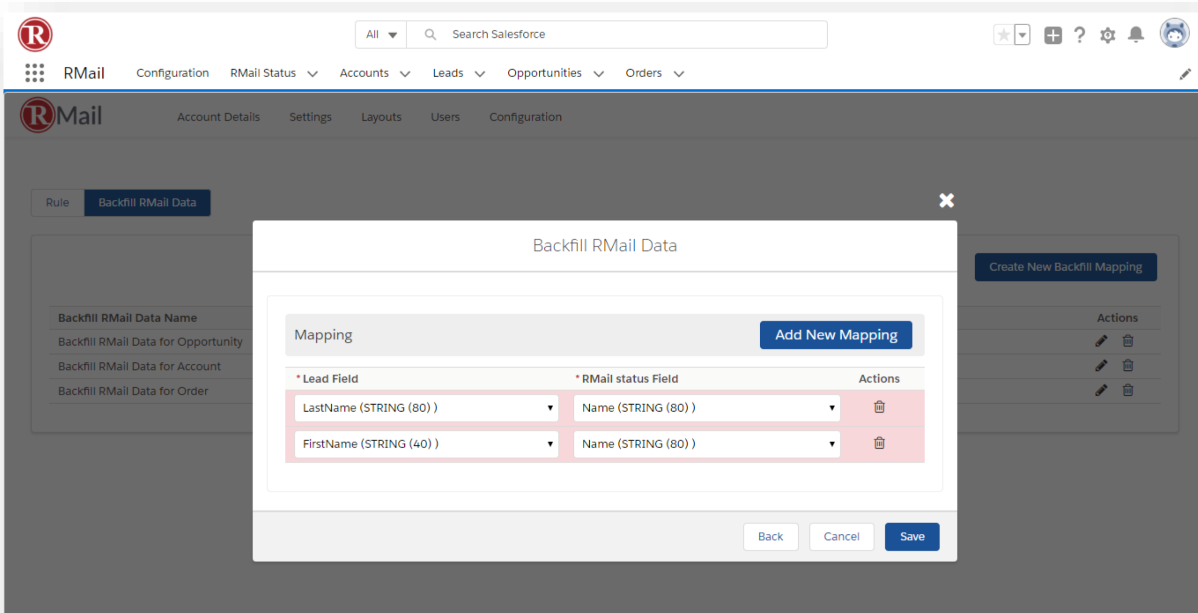
To start Backfill RMail Data mapping, in the Configuration tab, select **Backfill RMail Data.**



Then select "Create New Backfill Mapping" and select the Object that will contain the fields to map the RMial data to. A User can create multiple mappings in the same object.



Create the mapping use the pull-down arrows to find the Salesforce Object “field” and the RSign status “Field”. The RSign status field data will map in the direction to populate the mapped Salesforce Object “field”.



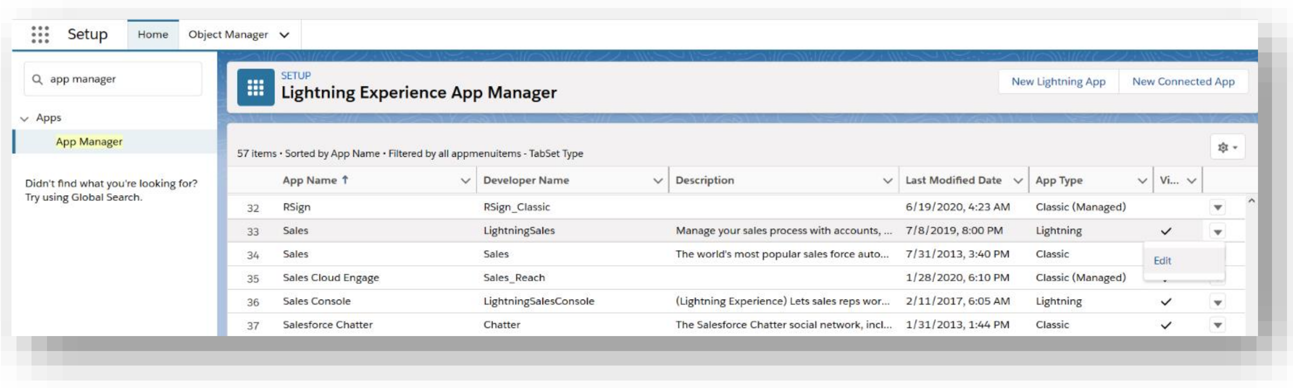
9. Admin Tips

8.1 Add the RSign Status Tab to the app users need

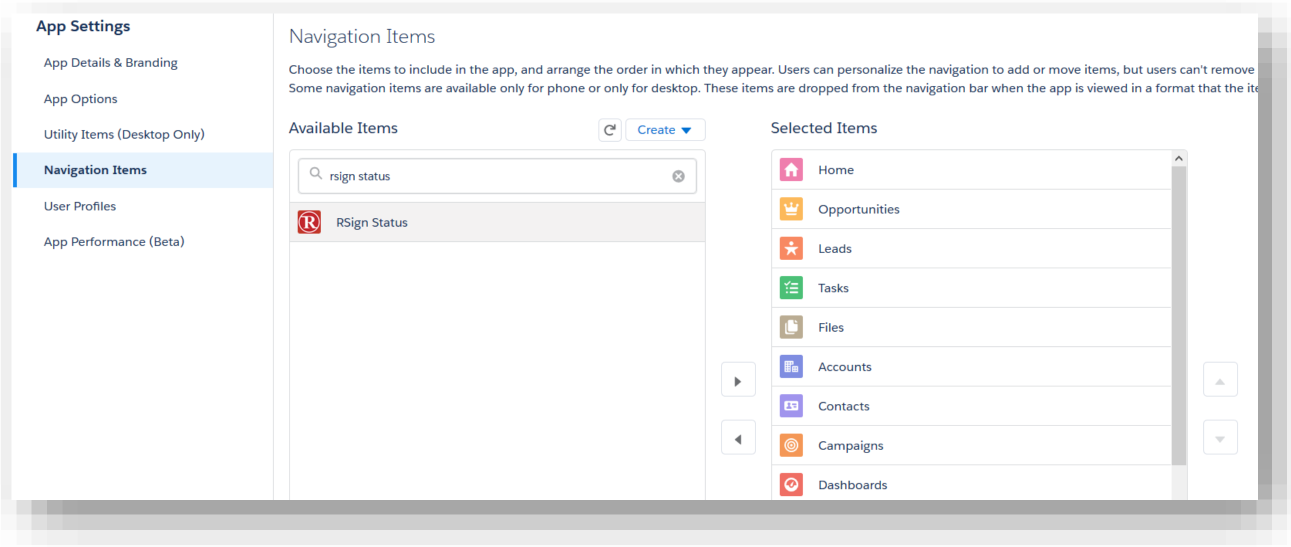
When installing the RSign application, it provides 2 custom object tabs. The **RSign Configuration** tab is very useful for admins, it allows them to customize settings for all users in one place. The **RSign Status** tab will help users see all sent information and track the registered documents cycle, regardless of the related object.

As an admin, you can add the **RSign Status** tab to the app where users work in a few simple steps whether users prefer Classic or Lightning interface, the steps are the same.

1. Go to **Setup** and search for "**app manager**" in the quick find box.
2. Find the app you want to add the tab to, click the icon on the right side of the screen and then click **Edit**



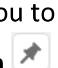
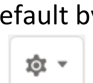
3. Go to **Navigation Items**, search for **RSign Status** and add it to the tab list on the right.
4. Move it up or down to place it somewhere handy for users.

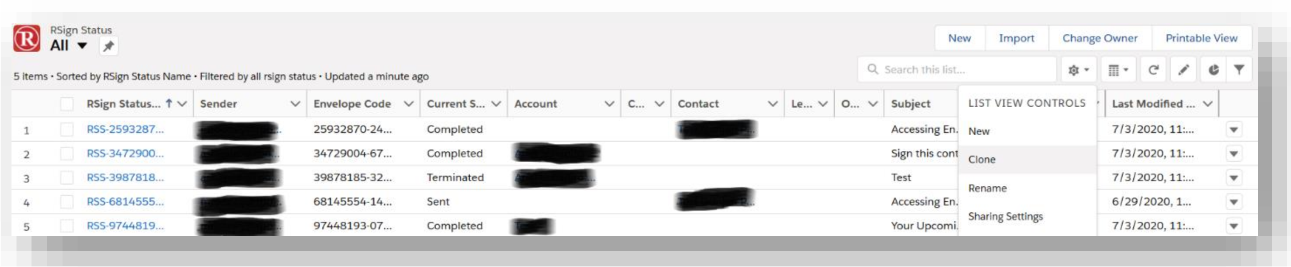


8.2 Create custom views to filter information

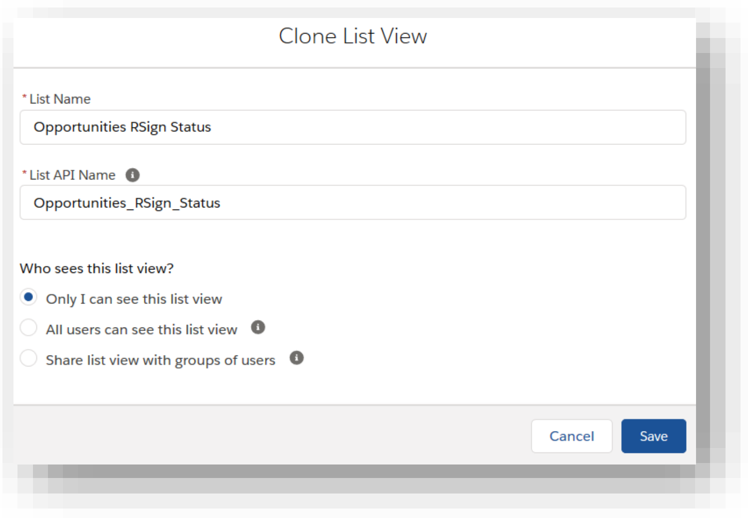
The **RSign Status** tab provides a comfortable way to check statuses and find information. To unlock the full power of this provided feature, you can use **Custom List Views** to enhance the user experience. An admin or a user can follow these instructions.

Upon installation, we provide the **All** view that includes our recommendations on the most important fields so we suggest you save time and clone this list.

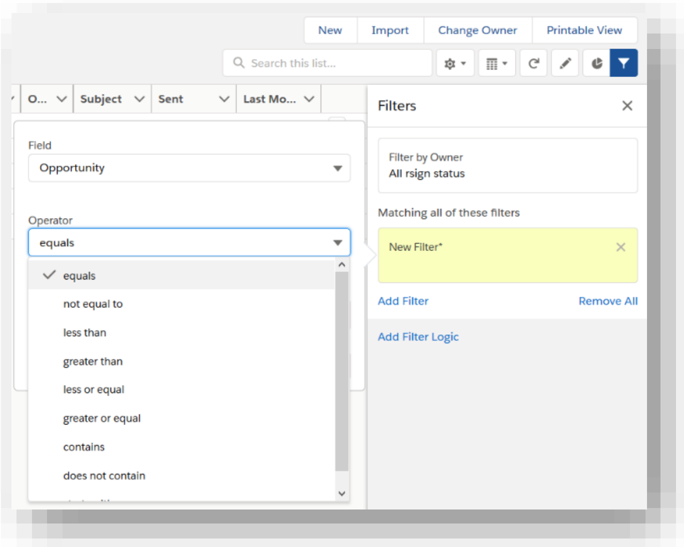
1. Go to the **RSign Status** tab and open the **All** list view.
2. (Lightning only) By default, Salesforce will direct you to the **Recently Viewed** list. Each user can make others be the default by clicking the **pin icon**  next to the list view's name
3. Click on the **gear icon**  and select **Clone**

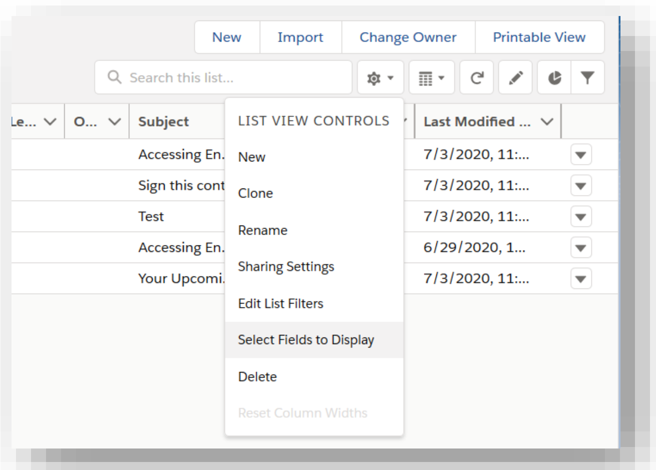


4. Set the name of the list you're creating and check the corresponding visibility options:
   - **Only I can see this list view**: The view won't be available to any other users
   - **All users can see this list view**: The view will be available to all users, even partner and customer community users.
   - **Share list view with groups of users**:



5. Once the view is saved, it will direct you to the new view. Click the **funnel icon** to add the **filters** you need and the **gear icon** and **Select Fields to Display** to add / remove fields.





8.3 Display useful columns in related lists

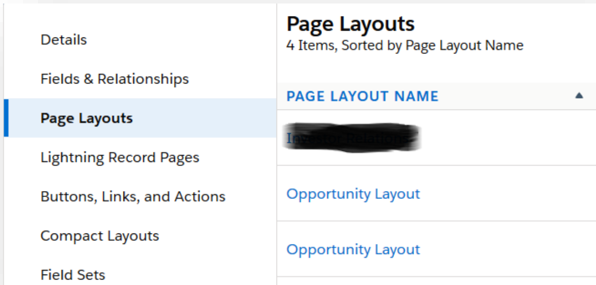
All supported standard objects will have an **RSign Status Related List** available. Once you add it, it's very helpful for your users to see the most useful fields. We recommend you add the following:

- **Subject**
- **Current Status**
- **Sent**

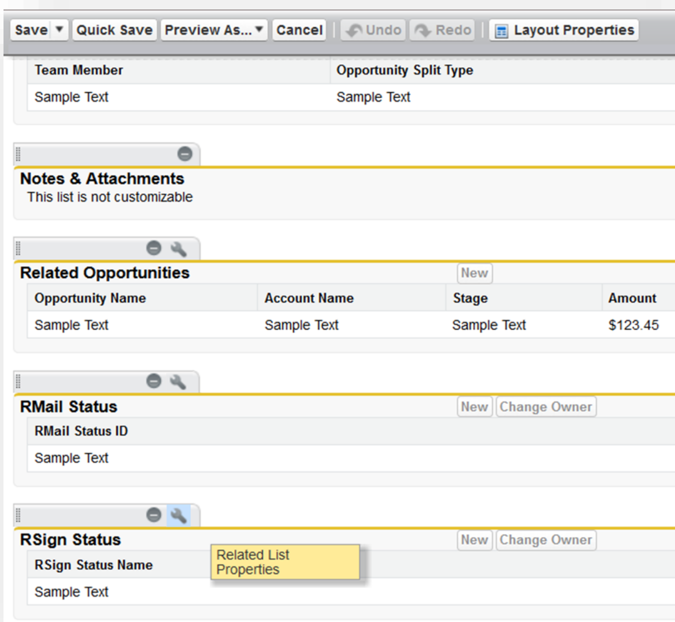
To add fields to a related list:

1. Go to Setup, Object Manager and choose the Lead, Account, Contact, Opportunity or Case Object.

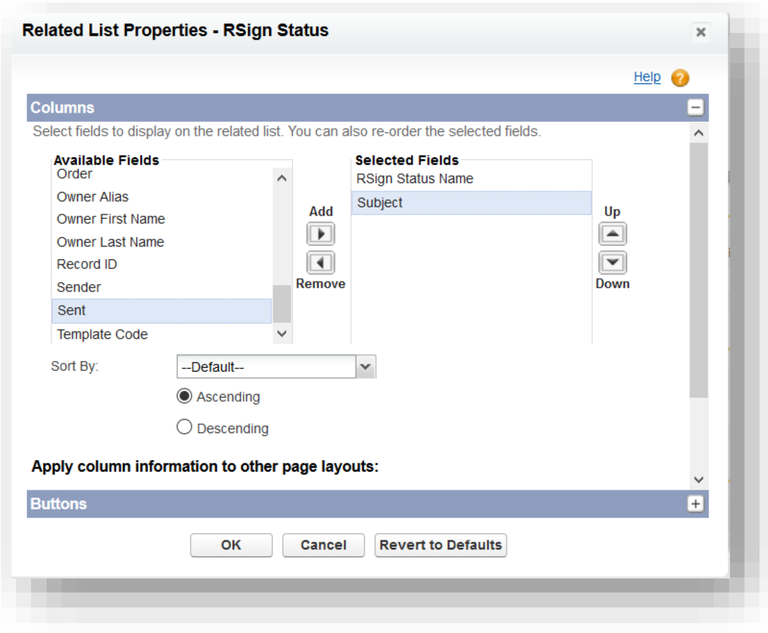
2. Select **Page Layouts** on the left column and click on the name of the page layout you want to edit



3. Scroll down to the Related Lists part and Click on the **wrench icon** to access the list's properties.



4. Select and **add the desired fields** and then choose the sorting criteria selecting one of the fields you added in the **Sort By** option


Related List Properties - RSign Status
Help
Columns
Select fields to display on the related list. You can also re-order the selected fields.
Available Fields
Order
Owner Alias
Owner First Name
Owner Last Name
Record ID
Sender
Sent
Template Code
Add
Remove
Selected Fields
RSign Status Name
Subject
Up
Down
Sort By:
--Default--
Ascending
Descending
Apply column information to other page layouts:
Buttons
OK
Cancel
Revert to Defaults