



Adobe Document Cloud eSign services

for Salesforce Version 16 Upgrade Guide

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The [Adobe Document Cloud eSign services \(formerly EchoSign\) for Salesforce](#) integration is available from the Salesforce AppExchange. This guide is designed to help current customers of Adobe eSign services upgrade from an older release version to eSign services for Salesforce version 16

Upgrading from a previous release

Each version of Adobe Document Cloud eSign Services (formerly EchoSign) for Salesforce has new features and enhancements that can provide key improvements to your document workflows. *Adobe strongly recommends that you upgrade to the latest release, as Adobe will be discontinuing support of older releases over time.*

eSign services for Salesforce version 16 can be automatically upgraded from any package called “EchoSign.” If you have earlier versions of EchoSign for Salesforce installed or need assistance for upgrades, please contact the eSign services client success manager assigned to your account. That person will be able to help you or direct you to Adobe support and/or Adobe Professional Services for assistance.

To find the version of the eSign services for Salesforce integration you currently have installed, choose Setup > Build > Develop > Installed Packages.



Action	Package Name	Publisher	Version Number
Uninstall	Salesforce1 and Chatter Apps	Salesforce.com	1.6
Description This package contains Connected Applications for all the officially support			
Uninstall Configure	EchoSign	EchoSign	14.5
Description EchoSign Contract Management			

Note the Package Name and the Version Number. The Package Name you have installed is either “EchoSign” or “EchoSign Unmanaged.”

Older versions of the EchoSign for Salesforce packages are unmanaged packages. Newer versions are managed packages. This document includes instructions on how to update from a managed or an unmanaged package. Please follow the instructions based on the package type installed currently.

For more information on managed versus unmanaged packages, visit http://www.salesforce.com/us/developer/docs/packagingGuide/Content/packaging_about_packages.htm.

Important upgrade notes for all customers

1. If you have users in your Salesforce org who belong to multiple eSign services accounts, please reach out to your Adobe client success manager or to Adobe support before upgrading.
2. Before upgrading your production account, Adobe recommends testing the upgrade process in your Salesforce sandbox environment. Also, make sure your email address in the Sandbox environment is one that you have access to in case you ever need to change the email for your eSign services account.

Upgrading from EchoSign unmanaged packages

If you have a package with the package name “EchoSign Unmanaged” currently installed, there are two possible approaches to upgrade to the latest version of the EchoSign for Salesforce managed package. You can decide which approach works better for your organization.

Option 1: Install the new version and hide the old

This option is much easier to set up than option 2, but the downside is that existing agreements in your org won't be as easily accessible by your users in the future.

1. Install the latest version of the Adobe Document Cloud eSign services managed package from the AppExchange into your org, configuring and exposing it to all relevant profiles and page layouts. Refer to the installation and customization guide for more information about setting up the new package. Once the latest eSign services package is installed, your Salesforce users can immediately start using it.
2. After installing the new package, hide the old unmanaged package from users by removing it from their profiles and page layouts. This action is strongly suggested so users are not confused by seeing two similarly named tabs, related lists, objects, and so on, side-by-side when using Salesforce.

This approach allows your Salesforce users to start using the new version of the eSign services for Salesforce package while retaining the legacy agreement data from the older package in case it needs to be accessed. However, note that since the old package is hidden, accessing it must be a rare and special request. If those older agreements need to be referenced frequently, then hiding the old package may not be the right course of action for your organization.

Option 2: Export/import data from the old package into a new package

Option 2 allows you to migrate your existing agreement data to the new package, but the downside is that it requires more effort than option 1. This approach involves the following steps:

1. Export the agreement data from the existing unmanaged package using a data loader tool like *Jitterbit* or *Dataloader.io* or the standard *Salesforce Data Loader*.
2. Uninstall your current unmanaged package, install the latest managed package version from the AppExchange, and reimport the agreement data from the old unmanaged package into the new package.

A word of caution about this approach is that uninstalling a package removes all eSign services data in that package (that is, agreements) from that org. Therefore, it requires that you export first and then import data back into Salesforce to retain the data when moving to the new managed package.

Note: The agreements still exist in echosign.adobe.com, but they are not accessible from Salesforce once you remove them.

In addition, exporting and importing agreement data may include child objects, depending on requirements, and must be structured appropriately. One complication that arises when importing child objects is that the parent agreement ID has changed, so it needs to be updated appropriately for each imported row. There are two key child objects:

- **Agreement Event**—Records the audit events for an agreement. If this is not required, it can be skipped.
- **Attachment**—Contains the original sent document and the final signed PDF for the agreement. Some orgs may have a signed PDF link to echosign.adobe.com, which for many would be sufficient, so the attachment can be skipped.

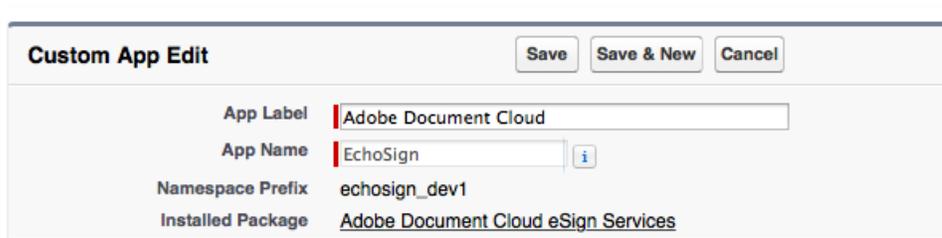
Another consideration is mapping the fields from the exported unmanaged records to the latest managed record. All the fields in the old package still exist in the new package, so they can be mapped directly. An advanced tool like Dataloader.io will automatically match to the correct field based on the column name.

For questions regarding upgrading from the EchoSign unmanaged packages, please contact your Adobe client success manager.

Upgrading from EchoSign managed packages

If you have a package with the package name of "EchoSign" currently installed, you can follow these instructions to upgrade to the latest version of the Adobe Document Cloud eSign services package.

1. Go to the *AppExchange* to download and install the eSign services for Salesforce app. You will be prompted to upgrade to version 16 during the installation process.
2. Once installed, navigate to Setup > Create > Apps, then do the following:
 - a) Click Edit next to EchoSign.
 - b) Change the App Label field to 'Adobe Document Cloud' as shown below.



Custom App Edit		Save	Save & New	Cancel
App Label	Adobe Document Cloud			
App Name	EchoSign			
Namespace Prefix	echosign_dev1			
Installed Package	Adobe Document Cloud eSign Services			

- c) Leave the App Name as is.
 - d) Click Save.
3. Refer to the appropriate sections in this guide for information on which settings and fields were added in versions 13, 14, and 15. You must manually enable these new settings and field values in your org in order for the v16 package to work correctly. For example if you are upgrading from v13 to v16, you should enable the settings and fields listed for v14 and v15.

Important upgrade notes for managed packages

1. *Do not* uninstall your existing EchoSign for Salesforce package. Uninstalling your EchoSign package will result in the loss of all your EchoSign (now Adobe Document Cloud eSign services) data in Salesforce.
2. Keep in mind that hosted agreements that were sent from EchoSign (now eSign services) for Salesforce version 14 or earlier and are still out for signature during the time of upgrade will not be able to get status updates when they are signed after the upgrade. Please make sure that agreements initiated as hosted agreements are signed before you upgrade.
3. Hosted agreements no longer need Sites in Salesforce, starting in version 13. Sites are required only if you need to send file transactions larger than 2.8 MB. Keep in mind that Professional Edition will not support sending large files because Sites are not supported. If you previously set up Sites for hosted agreements and do not need to send large transactions, you can deactivate the EchoSign Callback Site.
4. A number of new eSign services settings were added in versions 13, 14, 15, and 16. Make sure you review them and determine which you want to set for your org. The following sections outline the most

commonly used new settings and field values added in versions 13 to 16. For a full listing of all the eSign services custom settings, refer to the *installation and customization guide*.

What's new in version 16

Enhanced security with OAuth 2.0

To improve data security, eSign services now uses OAuth 2.0 to authenticate your eSign services account within Salesforce. This new protocol lets Salesforce talk to eSign services without requesting your eSign services password. Since sensitive information is not being shared directly between the apps, your account is less likely to be compromised. This improvement will not impact your implementation, but you will need to do a one-time setup to authorize your installed Salesforce package to communicate with the Adobe Document Cloud.

To perform this one-time setup, do the following:

1. Login with your existing Adobe Document Cloud eSign services (formerly EchoSign) account.
2. Through the OAuth Interface, allow the installed Salesforce package to communicate with the Adobe Document Cloud.
3. Continue with the Setup process.

New settings in version 16

There are no new settings in version 16.

Agreement Template field values added in version 16

There are no new template field values in version 16.

What's new in version 15

New settings in version 15

Review the new settings to determine if you want to enable any of these capabilities. To go to the settings, choose Develop > Custom Settings > (Manage) EchoSign Settings.

- **Show EchoSign Library Attachments**—Show the option to add EchoSign document templates.
- **Show EchoSign Field Templates**—Show the option to select and apply EchoSign form field layer templates on documents.
- **Hide Ability to Add EchoSign Field Templates**—Hide the link that allows senders to “Add Form Field Template” on draft documents.
- **Hide Reorder Attachments**—Hide the sort attachments option for draft agreements.
- **Hide Reorder Recipients**—Hide the sort recipients option for draft agreements.
- **Show Recipient Signing Order Options**—Show two options for recipient signing: serial (ordered entered) and parallel (in any order).

- **Read Only Recipient Signing Order Options**—Make the options for recipient signing order read-only on an agreement.
- **Enable Per Signer Identity Verification**—Allow each signer to have a different identity verification method (for example, password, phone, social identity, KBA).
- **Enable Phone Authentication**—Show the phone authentication option for verifying recipient identity. Usage of this feature is limited and may incur added costs.

Agreement Template field values added in version 15

If you want to use Agreement Templates and are currently using package versions 12, 13, or 14, edit the Agreement Template layout and drag the new field introduced in version 15 to the layout.

1. Choose Setup > Create > Objects > Agreement Templates > Page Layout > (Edit) Agreement Template Layout.
2. Add the new field added in version 15 to the Information section Agreement Options section:
 - Signature Flow

Manage and send agreements in batch in version 15

Version 15 introduces new functionality for sending agreements, deleting agreements, sending reminders, and managing agreements in batch. To enable these Batch Agreement buttons after upgrading:

1. Choose Setup > Create > Objects > Agreement > Search Layouts.
2. Edit the Search Results and Agreements List View layouts.
3. Add the five buttons.
4. Click Save.

New field values in version 15

Salesforce by default does not enable field values that were added to EchoSign (now Adobe Document Cloud eSign services) for Salesforce version 15 when you upgrade from an older version to the latest version. Therefore, you need to enable the following field values that were added in version 15:

Object: Add File Attachment (Attachment_Template__c)

Field: Attachment Type (Type__c)

Values to add:

- Document from EchoSign Library

Object: Agreement (SIGN_Agreement__c)

Field: Agreement Status (Status__c)

Values to add:

- Created

Object: Agreement Template (Agreement_Template__c)

Field: Language (Language__c)

Values to add:

- Vietnamese (Vietnam)

Object: EchoSign Field Mapping (SIGN_Field_Mapping__c)

Field: Map on Events (Map_on_Events__c)

Values to add:

- Expired

Object: EchoSign File Mapping (SIGN_File_Mapping__c)

Field: Map on Events (Map_on_Events__c)

Values to add:

- Expired

Delete custom settings and fields deprecated in version 15

In version 15, some EchoSign (now Adobe Document Cloud eSign services) custom settings and fields were deprecated and are no longer relevant.

Note: Before deleting fields, make sure that the values of these fields are not being used anywhere in your organization, for example, reports. This action is permanent and cannot be undone.

Deleting deprecated custom settings

After the upgrade, you should delete the deprecated custom settings by choosing Setup > Develop > Custom Settings > EchoSign Settings. Under the Actions column, click Del for the following fields:

- echosign_dev1__API_Key__c
- echosign_dev1__Enable_Suggest_Revisions_Field__c
- echosign_dev1__Reset_API_Security_Key__c
- echosign_dev1__Security_Shared_Token__c
- echosign_dev1__API_Server_URL__c
- echosign_dev1__Server_URL__c

Deleting deprecated fields

After the upgrade, you should delete the deprecated fields by choosing Setup > Create > Object. Select the object from the following list, navigate to the Custom Fields section, and click Del from the Actions column.

- Agreement Template
 - echosign_dev1__Suggest_Revisions__c
- Agreement
 - echosign_dev1__Enable_Revisions__c
 - echosign_dev1__Recipient_Signing_Order__c
 - echosign_dev1__Merge__c

Settings and fields added in version 14

Settings added in version 14

Review the settings added in version 14 to determine if you want to enable any of these capabilities. To go to the settings, choose Develop > Custom Settings > (Manage) EchoSign Settings.

- **Read Only Account**—Make the Account field a read-only agreement field. This is useful if you want to prepopulate the field but not allow the sender to edit it.
- **Read Only Agreement Name**—Make the Agreement Name field a read-only agreement field.
- **Read Only Email Copies**—Make the “Send email copies to” field a read-only agreement field.
- **Read Only Field Set**—Make the Additional Fields section read-only on an agreement.
- **Read Only Hosted Signing**—Make the Hosted Signing checkbox a read-only agreement field.
- **Read Only Language**—Make the Language field a read-only agreement field.
- **Read Only Message**—Make the Message field a read-only agreement field.
- **Read Only Opportunity**—Make the Opportunity lookup field a read-only agreement field.
- **Read Only Preview or Position**—Make the “Preview document or position signature fields” checkbox a read-only agreement field.
- **Read Only Recipient**—Make the Recipients section read-only on an agreement.
- **Read Only Security Options**—Make the Security Options section read-only on an agreement.
- **Read Only Sender Signs**—Make the “I also need to sign this document” checkbox a read-only agreement field.
- **Read Only Sign Expiration**—Make the “Allow signers X days to sign this document.” a read-only agreement field.
- **Read Only Sign Reminder**—Make the “Remind recipient to sign” checkbox a read-only agreement field.
- **Read Only Signature Type**—Make the Signature Type field a read-only agreement field.

Agreement Template field values added in version 14

If you want to use Agreement Templates and are currently using package version 12 or 13, edit the Agreement Template layout and drag the field introduced in version 14 to the layout.

1. Choose Setup > Create > Objects > Agreement Templates > Page Layout > (Edit) Agreement Template Layout.
2. Add the following field added in version 14 to the Information section Agreement Security Options section:
 - Available for Publisher Actions

Note: If you are using version 12, please remove the Password to Sign Agreement field used in version 12, as the previous fields replace it. Also, the option to Allow Signers to Suggest Revisions is no longer available in EchoSign (now eSign services), so you can remove it if it appears in your Agreement Template UI.

Other field values added in version 14

Salesforce by default does not enable field values that were added to EchoSign (now eSign services) for Salesforce version 14 when you upgrade from an older version to the latest version. Therefore, you need to add the following field values that were added in version 14:

Object: Add File Attachment (Attachment_Template__c)

Field: Attachment Type (Type__c)

Values to add:

- Quote Document from Opportunity Quote
- Runtime Variable

Object: Add Recipient (Recipient_Template__c)

Field: Source of Recipient (Type__c)

Values to add:

- All Opportunity Contact Roles
- Account Primary Contact Role
- Account Contact Role
- All Account Contact Roles
- Runtime Variable

Object: Agreement (SIGN_Agreement c)

Field: Language (AgreementLocale__c)

Values to add:

- Czech (Czech Republic)
- Turkish (Turkey)

Object: Agreement Template (Agreement_Template__c)

Field: Language (Language__c)

Values to add:

- Czech (Czech Republic)
- Turkish (Turkey)

Settings and fields added in version 13

Settings added in version 13

Review the settings added in version 13 to determine if you want to enable any of these capabilities. To go to the settings, choose Develop > Custom Settings > (Manage) EchoSign Settings.

- **Auto-Sync Group Mappings**—Automatically move the correct EchoSign groups when their Salesforce user profiles are updated.
- **Disable Send Email Copies**—Hide the “Send email copies to:” field on the send agreement page.
- **Disable Knowledge Based Authentication**—Hide the knowledge-based authentication (KBA) identity verification option for agreements. This is a signer identity verification method that requires signers to

provide and verify personal information to sign the document. Usage of this feature is limited and may incur added costs. Also, make sure your account send settings on EchoSign.com have KBA enabled so you can use it in Salesforce.

- **Disable Web Identity Verification**—Hide the web identity verification option for agreements. Web identity verification requires signers to verify their identity by signing into one of the following sites: Facebook, Google, LinkedIn, Twitter, Yahoo!, or Microsoft Live. Also, make sure your account send settings on echosign.adobe.com have web identity enabled so you can use it in Salesforce.
- **Enable Mapping Error Notification**—Send email notifications to the data mapping or merge mapping owner any time there are errors when the mappings are executed.
- **Enable Recipient Approver Role**—Enable the option to mark any recipient as an Approver. Approvers review and approve the document, but they are not required to sign it.
- **Enable Separate Signer Identity Methods**—Enable the option to select different identity verification methods for recipients in your EchoSign (now eSign services) account and those outside your eSign services account. This applies to KBA, web identity verification, and password to sign. For example, you can require that a customer be verified with Knowledge Based Identity before signing the document but require that your sales manager instead provide a password to sign the document. If you don't select this option, then all signers or approvers will verify using the same method, as selected by the sender.

Agreement Template field values added in version 13

If you want to use Agreement Templates and are currently using package version 12, edit the Agreement Template layout and drag the fields introduced in version 13 to the layout.

1. Choose Setup > Create > Objects > Agreement Templates > Page Layout > (Edit) Agreement Template Layout.
2. Add the following fields added in version 13 to the Information section Agreement Security Options section:
 - External Signers Verification Method
 - Internal Signers Verification Method

Other field values added in version 13

Salesforce by default does not enable field values that were added to EchoSign (now eSign services) for Salesforce version 13 when you upgrade from an older version to the latest version. Therefore, you need to add the following field values that were added in version 13:

Object: Add File Attachment

Field: Attachment Type

Value to add: Quote Document from Master Quote

Object: Agreement Template

Field: Language

Values to add:

- Chinese (Taiwan)
- English (United Kingdom)
- Korean (South Korea)
- Polish (Poland)

Object: Agreement (SIGN_Agreement c)

Field: Language (AgreementLocale__c)

Values to add:

- Chinese (Taiwan)
- English (United Kingdom)
- Korean (South Korea)
- Polish (Poland)

Object: EchoSign File Mapping

Field: Source Type

Values to add:

- Signed Agreement - Merged PDF
- Signed Agreement - Separate PDFs
- Supporting Documents

Object: Agreement

Field: Agreement Status

Values to add:

- Send in Progress
- Approved
- Waiting for Counter-Approval

Object: EchoSign Form

Field Import Field: Type

Value to add: Text Entry

For more information

Solution details: <https://www.echosign.adobe.com/en/products/echosign-salesforce.html>

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