OneSpan Sign for Salesforce

OneSpan Sign for Salesforce - QuickStart Guide

Version 2.1 - February 15, 2019

Welcome!

This is the *QuickStart Guide* for *OneSpan Sign for Salesforce*. It is intended for *Salesforce System Administrators* who want a quick way to install and explore the product for the first time.

This guide describes:

- Installing the Solution (below)
- Configuring the Solution (on the next page)
- Testing the Solution (on page 3)

Installing the Solution

Prerequisites

- You are a *Salesforce System Administrator*, and have a Salesforce Sandbox account (on `test.salesforce.com`).

  > If you want, you can evaluate the application using a Salesforce Developer account or a Salesforce Professional account.

- The *OneSpan Sign Administrator* must have a *Salesforce System Administrator* profile, and both the username and the password must be the same.
- *Chatter* is enabled in Salesforce.
- You have an *OneSpan Sign Sandbox* account. If you don't yet have an account, you can sign up for one.
- You have one of the following Salesforce Editions:
  - Professional
  - Enterprise
  - Unlimited
  - Developer

Action

To install *OneSpan Sign for Salesforce v4* for the first time:

1. Open a web browser, and navigate to https://appexchange.salesforce.com.
2. Using the search field at the top of the page, search for *OneSpan Sign*.
3. Click the **OneSpan Sign for Salesforce** app, and then click **Get It Now**.
4. Click **Log in to the App Exchange**, and enter your Salesforce login credentials.
5. Click **Install in Sandbox**. An *Almost there!* screen appears.
6. Select the **I have read and agree to the terms and conditions** box.
7. Click **Confirm and Install**.

8. On the screen that appears, enter the username of your Salesforce Sandbox account. The *Transaction Installation Details* page appears.
9. Click the **Install for Admins** option, and click **Continue**. An *Approve Third-Party Access* dialog box appears.
10. Select the **Yes, grant access to these third party web sites** box, and click **Continue**.
11. If you have a Production Salesforce installation:
    a. Review the displayed information, and click **Next**. A *Choose security level* page appears.
    b. Select **Grant Access to Admins Only**, and click **Next**. An *Install Transaction* page appears.
    c. Click **Install**.
    d. After the installation is complete, click **Manage Licenses**, and assign the Salesforce license to the user who wants to use *OneSpan Sign for Salesforce*.

    > Because you are installing the application for the first time, you have only one Salesforce license. For additional licenses, contact your OneSpan Sign CSR (*Customer Satisfaction Representative*).

12. The *OneSpan Sign Installed Transaction Details* page appears, enabling you to review the application details.

Configuring the Solution

This section describes the following aspects of configuring the solution:

- Configuration Prerequisites (below)
- Connecting to OneSpan Sign (below)
- Configuring an Existing Salesforce User (on the next page)

Configuration Prerequisites

- You are both a *Salesforce System Administrator* and an *OneSpan Sign Administrator*.
- Your Salesforce Sandbox account is configured with a *First Name*, *Last Name*, and *Email Address*. These values are the same as those used for your OneSpan Sign Sandbox account.

Connecting to OneSpan Sign

OneSpan Sign for Salesforce must be connected to your OneSpan Sign Sandbox account.

To connect *OneSpan Sign for Salesforce* to your OneSpan Sign Sandbox account:

1. Log in to the relevant *Salesforce.com* organization as a *System Administrator*.
2. Click the **Salesforce.com App Menu** in the top-right corner. From the drop-down menu, select **OneSpan Sign**. The *OneSpan Sign Transactions Home* page appears.
3. Click the **Admin** tab. The *OneSpan Sign Admin* page appears.
4. In the *OneSpan Sign* section of the **Configuration** tab, select your environment from the *Environment* drop-down menu. For more information on environments, see Environment URLs & IP Addresses.
5. Choose **OneSpan Sign Credentials** as the *Connection Method*. Then type your *OneSpan Sign username* and *OneSpan Sign password* in the text fields.
6. Click **Connect**. A dialog box requests the permission to connect.
7. Click **Allow**. A connection is established between *OneSpan Sign for Salesforce* and your Sandbox OneSpan Sign account.

Configuring an Existing Salesforce User

To enable an existing Salesforce user to access *OneSpan Sign for Salesforce*:

1. Log in to the relevant *Salesforce.com* organization as a System Administrator.
2. In the top menu, click **Setup**.
3. In the *Administer* section, select **Manage Users**.
4. Click **Users**.
5. Click the name of the Salesforce user.
6. Click **Permission Set Assignments**, and then click **Edit Assignments**. In the *Permission Set Assignments* page, set the permissions.

> TIP: To view descriptions of the Permission Sets, click here. If you want to evaluate *OneSpan Sign for Salesforce* for the first time, select all the Permission Sets.

7. Click **Save**.

Testing the Solution

After you've installed and configured your solution, you can test it by sequentially performing the following procedures:

1. Creating a Transaction (below)
2. Adding Documents (below)
3. Adding Signers (on the next page)
4. Preparing Documents (on the next page)
5. Sending the Transaction (on page 5)
6. Signing the Transaction (on page 5)

Creating a Transaction

To create a package:

1. Log into Salesforce as a user who has permission to create a package.
2. On the *Salesforce* menu, click **Transactions.** The *Transactions Home* page appears.
3. In the *Recent Transactions* section, click **New**.
4. Enter a **Transaction Name**.
5. Click **Next**. The package is created, with the logged-in user as its default signer.

Adding Documents

> CAUTION: The system supports a maximum of 5 MB *per document* (smaller documents yield better performance – we recommend under 5 MB per document). The system supports a maximum of 10 documents per package or package template. However, there is no limit to the total collective size of documents in a package.

To add documents to your package:

1. From the *Documents* section of the package, click **Add Document**. A new page appears.
2. Click **Upload local files**.
3. Click **Choose Files**.

4. Select one or more files from your local directory, and click **Open**.
5. Click **Add selected documents**. The documents you selected are added to the package.

Adding Signers

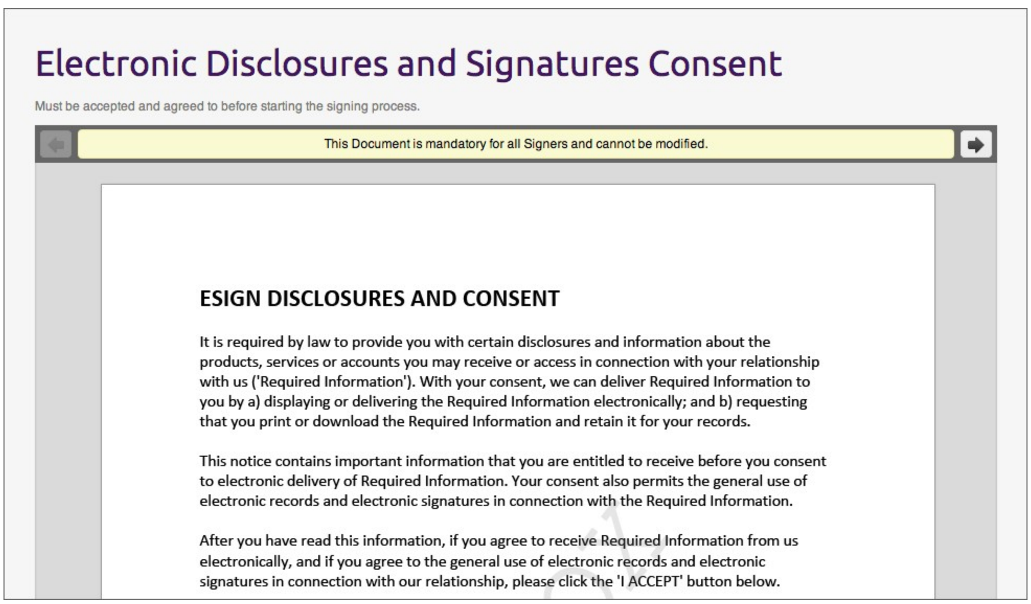
To add two signers to your package:

1. From the *Signers* section of the package, click **Add Signer**. A new row appears.
3. From the drop-down menu in that row, select **Contact**.
4. Click the magnifying glass next to the **Lookup** field, and select a Contact.
5. Click **Add Signer** again. A new row appears.
6. From the drop-down menu in that row, select **External Email**.
7. Manually enter the **First Name**, **Last Name**, and **Email** of a suitable signer.
8. Click **Save Signers**. The two signers you specified are added to your package.

Preparing Documents

To prepare your documents for signing:

1. While viewing your package (to which one or more documents have been added), click **Prepare**.The *Designer* view appears.
3. On the *Electronic Disclosure and Signature Consent* agreement, click the right-facing arrow to display the package's first document.



4. From the drop-down **Signers** menu, select a signer.
5. Click **Add Signature** to add a Signature Block for that signer.
6. Drag the Signature Block to where you want it to appear in the document.
7. If you want to change the Signature Block type, or if you want to add a field, click the gear icon. The Signature Block menu appears.
8. Repeat Steps 4-7 for each Signature Block you want to add to the document.
9. If there is another document, click the right arrow to display it, and repeat Steps 4-8.
10. Repeat the previous step for each document in the package.
11. Close the window by clicking the **X** in the upper right corner.

Sending the Transaction

To send your package to be signed:

- From the *Transaction Edit* page, click **Send**. The package is sent to be signed, and each signer receives an appropriate email.

Signing the Transaction

To sign the documents in your package:

1. If you are the Transaction Owner as well as a signer (with at least one assigned Signature Block), on the *Transaction Detail* page, click **Sign**. A preview window displays the first document.
2. If you are a signer but not the Transaction Owner:
   a. In the email you received, click **Go to Documents**.
   b. Read the Consent Agreement, and click **Accept**. A preview window displays the first document.
3. Sign all of your Signature Blocks in the document. Those blocks should be indicated by sticky notes.

> **TIP:** If any unsigned Signature Blocks lie outside your screen, an *Unsigned Signatures* notification displays the number of signatures that are still required.

> **TIP:** A progress bar at the top of the document indicates the number of signatures you have completed, as well as the total number of signatures assigned to you in this document (e.g., *3/10 completed*).

4. To confirm your signatures in the current document, click **OK**.
5. Repeat Steps 3-4 for each document in the package.
6. Once all your signatures have been applied, a refreshed version of the screen confirms that you have finished signing the package.

> Once a package has been signed by all signers, its status is changed to *Completed*. To view that status, it may be helpful to refresh your page.

7. To verify that all documents in a completed package have been signed, in the *Documents* section of the *Transaction Detail* page, click the icon under **Signed Documents**. This enables you to download your documents. Open each document, and verify that all its Signature Blocks have been signed.

> **TIP:** To learn more about using *OneSpan Sign for Salesforce v4*, see the OneSpan Sign for Salesforce 4 User's Guide.