

eSignLive for Salesforce CPQ Deployment Guide

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Introduction

The *eSignLive for Salesforce CPQ* application enables its users to quickly obtain secure and compliant electronic signatures for sales quotes, proposals, contracts and invoices generated in *Salesforce CPQ*.

This document describes how to install and configure eSignLive for Salesforce CPQ.

NOTE: *eSignLive for Salesforce CPQ* works in both Classic Salesforce and in Salesforce with the Lightning Experience enabled.

The rest of this document describes:

- [Installation and Initial Configuration on page 2](#)
- [Configuring an OneSpan Sign Button on page 5](#)

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Installation and Initial Configuration

This section describes how to install and configure eSignLive for Salesforce CPQ. It is comprised of the following sections:

- [Prerequisites on page 3](#)
- [Installing eSignLive for Salesforce CPQ on page 4](#)

2.1 Prerequisites

- OneSpan Sign for Salesforce must be installed on your system. For instructions, click [here](#).
- eSignLive for Salesforce CPQ must be installed on your system. For more information, click [here](#).

2.2 Installing eSignLive for Salesforce CPQ

To install and initially configure eSignLive for Salesforce CPQ:

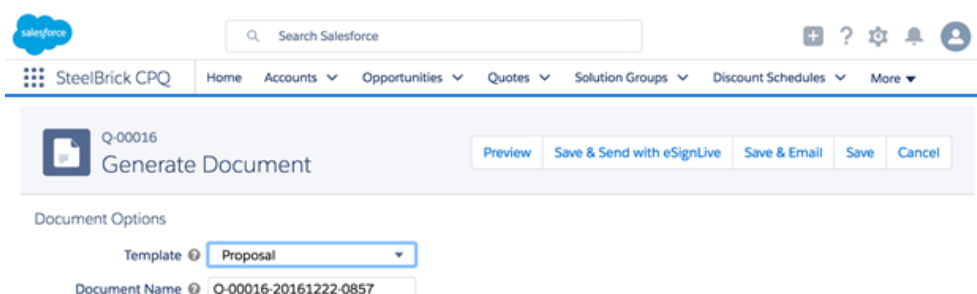
1. Install the *eSignLive for Salesforce CPQ* application from the *AppExchange* (click [here](#)).
2. Navigate to your installed transactions, and find the *eSignLive for Salesforce CPQ* application.
3. Click **Configure**.
4. On the page that appears, click the **Plugins** tab.
5. In the **Electronic Signature Plugin** field, add the following text:
`ESLSCPQ.SalesforceCPQInterface`
6. Click **Save**.
7. Add the **OneSpan Sign Transactions** related list to the **Quote Document** page layout.
8. Assign one of the following permission sets to each anticipated user, based on their role:
 - **eSignLive for Salesforce CPQ Admin** – Permits managing Parameter Mappings between eSignLive for Salesforce CPQ and OneSpan Sign.
 - **eSignLive for Salesforce CPQ User** – Permits sending documents generated in eSignLive for Salesforce CPQ to OneSpan Sign for signing.

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Configuring an OneSpan Sign Button

eSignLive for Salesforce CPQ enables the insertion of a customized OneSpan Sign button on the *Generate Document* page of *eSignLive for Salesforce CPQ*. Clicking that button: (1) saves the current *eSignLive for Salesforce CPQ* document; (2) sends that document to OneSpan Sign for signing.

In the following screen capture, that custom button's label says *Save & Send with OneSpan Sign*.



The following procedure describes how to configure the OneSpan Sign button for *eSignLive for Salesforce CPQ Quote Templates*. The button will appear on the *Generate Document* page of all Quote Documents created with the Quote Templates.

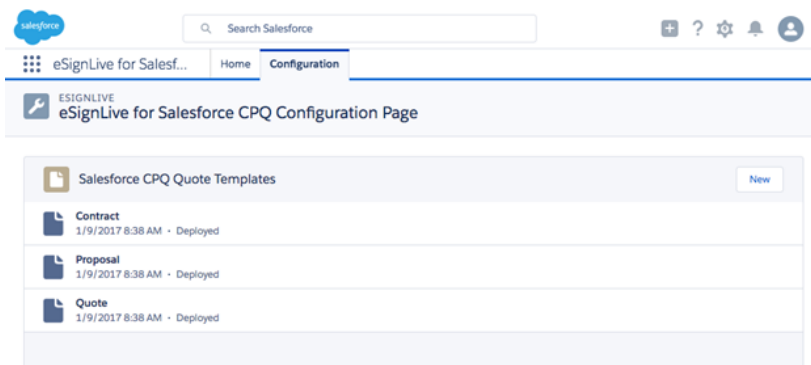
3.1 Prerequisites

- You are an eSignLive for Salesforce CPQ Admin.

3.2 Action

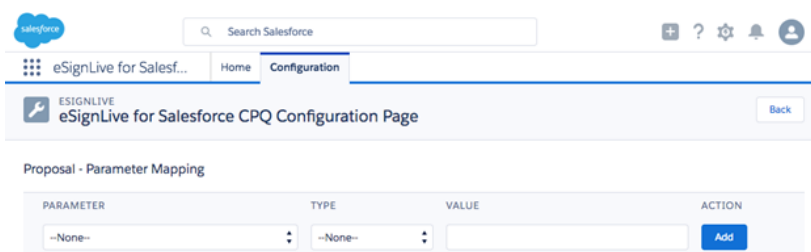
To configure the OneSpan Sign button for eSignLive for Salesforce CPQ Quote Templates:

1. Click the **Configuration** tab in eSignLive for Salesforce CPQ. A list of your eSignLive for Salesforce CPQ Quote Templates appears.



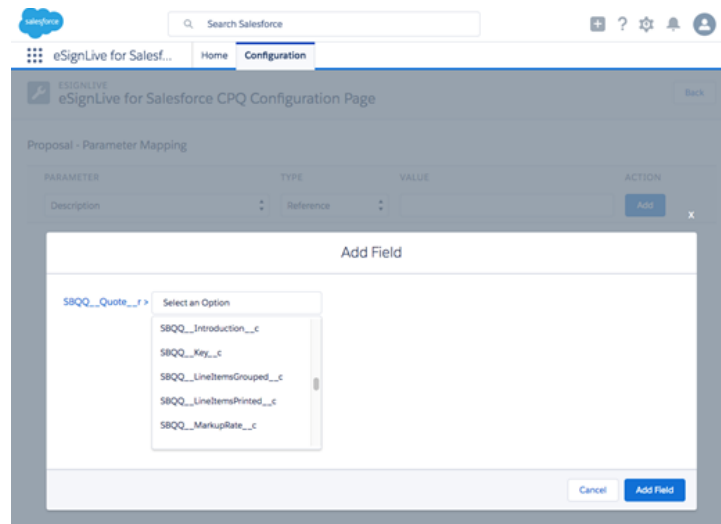
2. Click the Quote Template you'd like to configure. The following *Parameter Mapping* screen appears:

NOTE: Clicking the down arrow on the *PARAMETER* list displays multiple parameters. To view a complete list of the parameters and their descriptions: (1) click the **OneSpan Sign Admin** tab of the *OneSpan Sign for Salesforce* application; (2) click the **Instructions** sub-tab; (3) click the **Custom Button** link.



3. By doing the following, customize the OneSpan Sign button with appropriate Parameter Mappings between eSignLive for Salesforce CPQ and OneSpan Sign:

- a. Select a suitable parameter from the *PARAMETER* drop-down list.
- b. Select one of the following mapping types from the *TYPE* drop-down list:
 - **Static:** Choose this type if the parameter's value will be static text.
 - **Reference:** Choose this type if the parameter's value will be imported from a Salesforce field. If this type is selected, a magnifying glass appears in the *VALUE* text box. Click that glass to open a screen that you can use to select the Salesforce field from which the parameter's value will be imported.



- c. Click **Add**. The parameter you've added now appears in the Parameter Mapping.
- d. Repeat Steps 3a-c to add any other desired parameters. The following screen capture displays a fully configured Quote Template that has all the parameters needed to automatically prepare and send a document for signing by OneSpan Sign:

Proposal - Parameter Mapping

PARAMETER	TYPE	VALUE	ACTION
ConventionId	Static	a02410000037Aeo	Delete
Signer1Label	Static	a0E41000001Fr5y	Delete
AutoPrepare	Static	true	Delete
ParentId	Reference	{!Id}	Delete
Documents	Reference	{!SBQQ__DocumentId__c}	Delete
Signer1	Reference	{!SBQQ__PrimaryContactId__c}	Delete
Name	Reference	Proposal - {!Name}	Delete
Send	Static	true	Delete
returnUrl	Reference	{!Id}	Delete

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- e. Once your Parameter Mappings are complete, test them by opening *Salesforce CPQ* . On the *Generate Document* page of a Quote Document created with the configured Quote Template, you should see a *Save & Send with OneSpan Sign* button. When clicked, that button should: (1) save the current *eSignLive for Salesforce CPQ* document; (2) send that document to OneSpan Sign for signing.