DocuSign

Admin Guide

(Legacy) DocuSign eSignature for Salesforce CPQ v2.1

Published: March 08, 2021

This guide applies to the standalone (legacy) DocuSign eSignature for Salesforce CPQ app.

This app is only recommended for customers using the Salesforce CPQ built-in quote document generation feature.

We recommend upgrading to the DocuSign Apps Launcher package of apps, which includes:

- **DocuSign Gen for Salesforce**
- **DocuSign eSignature for Salesforce**

These apps are the modern solutions for your CPQ quote-generation and signing needs.

DocuSign will continue to support legacy users. The legacy app will no longer be developed, but we will continue to fix issues.

Legacy app downloads are available on this page.

Copyright

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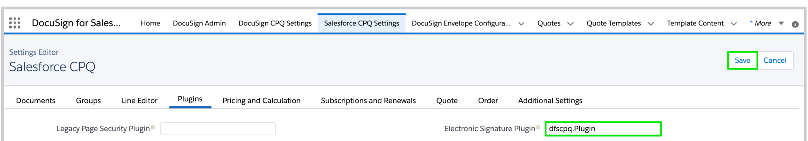
Install DocuSign Plugin for Salesforce CPQ

Follow these steps to install the DocuSign eSignature for Salesforce plugin in your Salesforce CPQ package:

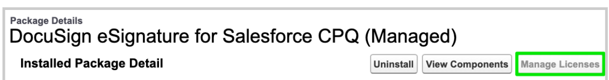
1. Click the App Launcher grid .
2. Click the **DocuSign eSignature for Salesforce CPQ** tile.
3. Click the **Salesforce CPQ Settings** tab.
4. In the header, select the Plugins tab.
5. Type `dfscpq.Plugin` in the Electronic Signature Plugin field.
6. Click the **Save** button.



The process is complete. The DocuSign eSignature for Salesforce CPQ plugin is now installed.

Assign Licenses to All Participating Users

1. Log into Salesforce as an Administrator.
2. Click the gear  in the upper-right of the page.
3. Click **Setup**.
4. Type **Installed Packages** in the Quick Find field and click the **Installed Packages** link.
5. Click the **DocuSign eSignature for Salesforce CPQ** hyperlink. The Package Details page opens.
6. Click the **Manage Licenses** button.



7. Add the user to the license.
8. Repeat steps 1 through 6 to assign user licenses for additional Managed Packages to be added from the Installed Packages list.

The process is complete. License rights have been granted to the proper users.

Set Permissions for Users

Important:

This guide applies to the standalone (Legacy) DocuSign eSignature for Salesforce app. This app has been de-listed from the Salesforce App Exchange. It has been replaced by the new DocuSign eSignature for Salesforce app from the DocuSign Apps Launcher package of apps.

DocuSign will continue to support legacy users. The legacy app will no longer be developed, but we will continue to fix issues.

To upgrade, install the new DocuSign eSignature for Salesforce app.

Salesforce Permission Sets need to be configured for all DocuSign eSignature for Salesforce CPQ users. Without the proper Permission Set membership, users will be unable to access the app. There are two Permission Sets that are added when the app is installed:

- **DocuSign CPQ Administrator**: Automatically granted to the installing administrator. This Permission Set grants full access to app functionality, including sending and managing settings and permissions. This Permission Set can be added to additional users and Profiles and is not limited to the installing admin.
- **DocuSign CPQ Sender**: Must be granted to a user or Profile by a DocuSign CPQ Administrator. This Permission Set allows users to send quotes through DocuSign.

Assign DocuSign CPQ Administrator Permissions

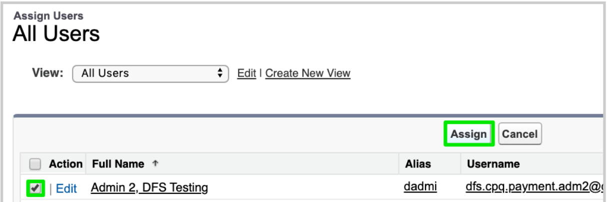
Users who require administrator access to the DocuSign eSignature for Salesforce CPQ app can be added to the **DocuSign CPQ Administrator** Permission Set.

Note: Only an existing **DocuSign CPQ Administrator** can add a user to the **DocuSign CPQ Administrator**Permission Set.

1. Click the gear in the upper-right of the page.
2. Click the **Setup** button.
3. Type **Permission Sets** in the Quick Find field in the upper-left.
4. Click the **Permission Sets** link that appears.
5. Click the **DocuSign CPQ Administrator** link.
6. Click the **Manage Assignments** button.
7. Select the **Add Assignments** button.

8. Check the box to the left of the user(s) you wish to add to the DocuSign CPQ Administrator Permission Set.

9. Click the **Assign** button.



10. Click the **Done** button.

11. Select the user's profile, and change the Opportunity Page Layout to the CPQ Opportunity Layout.

The process is complete. Selected users now have administrator access to the DocuSign eSignature for Salesforce CPQ app.

Assign DocuSign CPQ Sender Permissions

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To upgrade, install the new DocuSign eSignature for Salesforce app.

Users who require Sender access to the DocuSign eSignature for Salesforce CPQ app can be added to the **DocuSign CPQ Sender** Permission Set.

Note: Only an existing **DocuSign CPQ Administrator** can add a user to the **DocuSign CPQ Sender**Permission Set.

1. Click the gear  in the upper-right of the page.

2. Click the **Setup** button.

3. Type **Permission Sets** in the Quick Find field in the upper-left.

4. Click the **Permission Sets** link that appears.

5. Click the **DocuSign CPQ Sender** link.

6. Click the **Manage Assignments** button.

7. Select the **Add Assignments** button.

8. Check the box to the left of the user(s) you wish to add to the Negotiate Permission Set.

9. Click the **Assign** button.

   A screen opens announcing: **Permission set DocuSign CPQ Sender has been assigned to (number of users selected).**

10. Click the **Done** button.

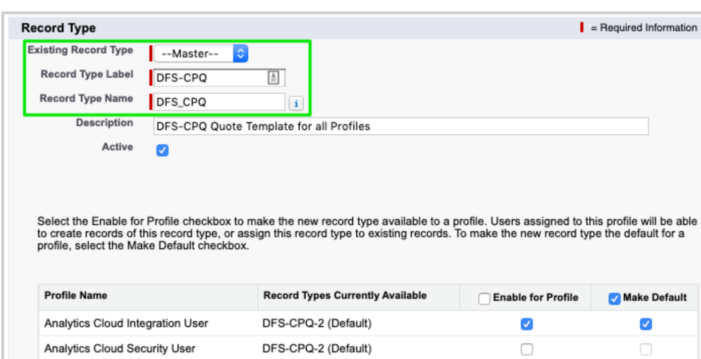
11. Select the user's profile, and change the Opportunity Page Layout to the CPQ Opportunity Layout.

The process is complete. Selected users now have sender access to the DocuSign eSignature for Salesforce CPQ app.

Create a Quote Template Record

1. Log into Salesforce as an Administrator.
2. Click the gear in the upper-right of the page.
3. Select **Setup**.
4. Type **Object Manager** in the Quick Find field.
5. Click the **Object Manager** link.
6. Click the **Quote Template** link in the left-hand Object Manager menu.
7. Click the **Record Types** link.
8. Click the **New** button in the upper-right of the page.

   The Quote Template page opens.
9. Complete the following fields:
   a. **Existing Record Type**: Leave as **–Master–**.
   b. **Record Type Label**: Type **DFS-CPQ** in the text field.
   c. **Record Type Name**: Field populates with **DFS_CPQ**. Do not change.
   d. **(Optional)Description**: Type a description to explain the template purpose.
   e. **(Optional) Active**: Check box to make the template available immediately.
   f. **(Optional) Enable for Profile**: Check boxes to enable for specific Profiles.
   g. **(Optional) Make Default**: Check boxes to make the default for a profile.



10. Click the **Next** button at the bottom-right of the screen. The Quote Template page opens.

> **Note:** Keep the **Apply one layout to all profiles** radio button selected.

11. **(Optional) Apply a different layout for each profile**: Select this radio button to customize each page layout.

12. Click the **Save** button in the bottom-right of the page.

The process is complete. You now have a Quote Template Record to use for your payment configuration.

Add DocuSign AutoPlace Fields to a CPQ Template

AutoPlace fields (also called anchor tags) can be added to a CPQ quote template, so that when quote documents are generated, the anchor tag codes are replaced with the corresponding DocuSign fields, such as line items, signature fields, and terms and conditions.

> **Note:** These steps assume you have already created a CPQ quote template and want to add AutoPlace fields to it. For more information about creating CPQ quote templates, see Building Your CPQ Documents with CPQ Templates on the Salesforce Help site.

Follow these steps to add AutoPlace fields to a quote template in DocuSign eSignature for Salesforce CPQ:

1. Log into Salesforce as an administrator.

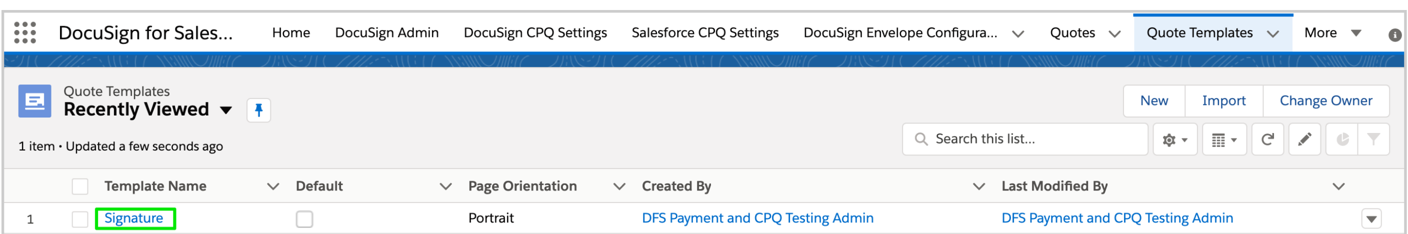
2. Click the **Quote Templates** tab.

3. Click the name of the template to which you want to add AutoPlace fields.

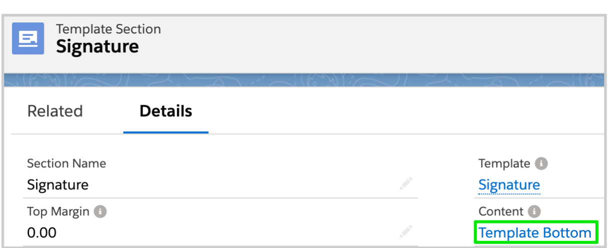
4. Click the **Related** tab.

5. Click the template name to which anchor tags will be added.

   > **Note:** In this example, it's the **Signature** link.



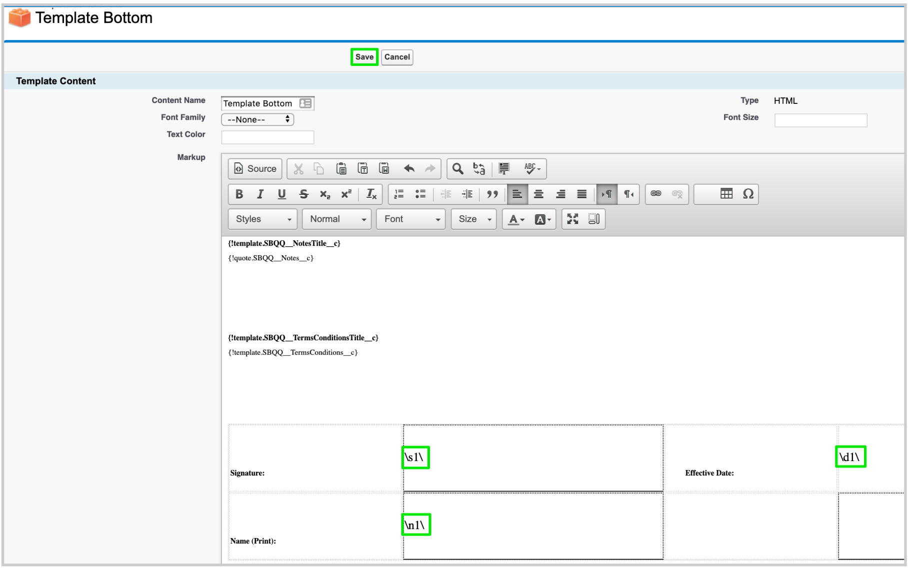
6. Click the **Template Bottom** link on the Details tab.



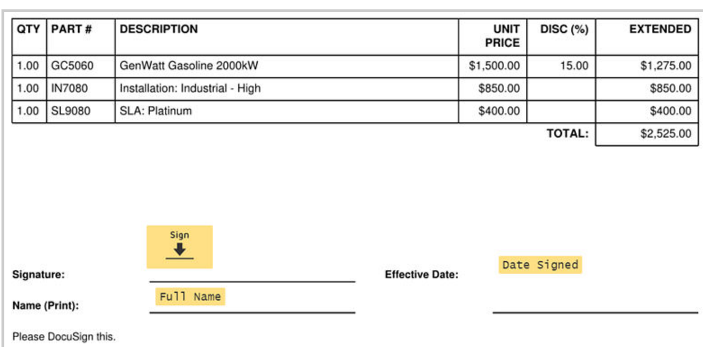
7. Click the **Edit** button.

8. Place the DocuSign AutoPlace codes (anchor tags) for the fields you want to add to the template.

> **Note: Be sure to make the color of the anchor text the same color as your template (usually white). This prevents the tags from being visible on the generated document.**



The resulting tags on the finished document are shown in the image below:



QTY	PART #	DESCRIPTION	UNIT PRICE	DISC (%)	EXTENDED
1.00	GC5060	GenWatt Gasoline 2000kW	$1,500.00	15.00	$1,275.00
1.00	IN7080	Installation: Industrial - High	$850.00		$850.00
1.00	SL9080	SLA: Platinum	$400.00		$400.00
				TOTAL:	$2,525.00

9. Click the **Save** button.

The process is complete. When a new quote is created, AutoPlace tags populate DocuSign signature fields from your connected account. For more information on anchor tags, see Automatic Anchor Tags and Recipient Signer Roles on the DocuSign support site.

Add Quote-Related Lists to Opportunity Page Layouts

After installing all prerequisites, add the necessary quote-related objects to your Opportunity page layout.

1. Log into Salesforce as an Administrator.

2. Click the gear in the upper-right of the page.

3. Select **Setup**.

4. Type **Object Manager** in the Quick Find field.

5. Click the **Object Manager** link.

6. Click the **Opportunity** link in the Object Manager menu.

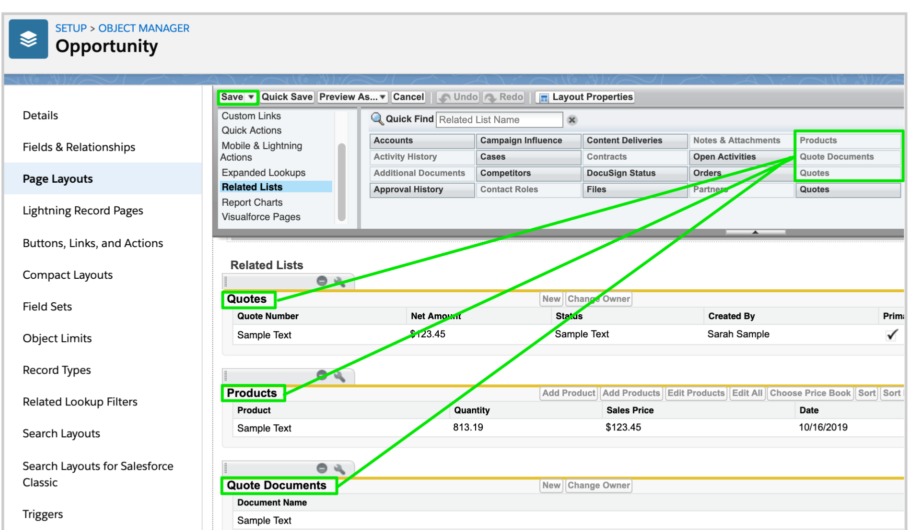
7. Click the **Page Layouts** link.

8. Click a link to be edited under the **Page Layout Name** header.

9. Click the Related Lists menu link.

10. Drag the following items to the Opportunity page layout:
    - **Quotes**
    - **Products**
    - **Quote Documents**

11. Click the **Save** button in the upper-left of the Opportunity page layout.



The process is complete. The necessary items are now present in the Opportunity page layout.

Create a DocuSign Envelope Configuration for DFS CPQ

DocuSign custom buttons can be added to Salesforce object pages with the DocuSign Envelope Configuration feature. This process enables administrators to easily create custom buttons in the user interface, without having to use scripting.

Name Envelope Configuration

Step one of the process involves initiating the Envelope Configuration process and giving the configuration a unique name. This name should easily convey the purpose of the configuration to other users in your Salesforce org.

1. Click the App Launcher grid .

2. Click the **DocuSign eSignature for Salesforce CPQ** tile from the App Launcher menu.

3. Click the **DocuSign Envelope Configurations** tab.

4. Click the **New** button to create a new DocuSign Envelope Configuration.

5. Type a name in the **DocuSign Envelope Configuration Name** field.

6. Click the **Save** button.

   A banner notifies: **DocuSign Envelope Configuration "(your configuration name)" was created.**

Step one of the process is complete. You have initiated and named a new DocuSign Envelope Configuration. Move to step two to select the main Salesforce object (Account, Opportunity, etc.) from which the configuration will import data.

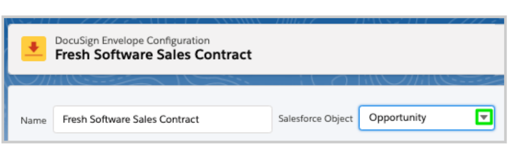
Select Salesforce Object

Step two of the process involves selecting the Salesforce parent object (Account, Opportunity, etc.) from which data will be imported.

1. Click the **Salesforce Object** dropdown menu to the right of the Name field.

2. Scroll to the Object you need and click it to select.

> **Note:** You can also type in the **Salesforce Object** field to jump to an object in the list.



Step two of the process is complete. The Salesforce Object (Account, Opportunity, etc.) is selected and the Envelope Configuration can now access fields relating to that object. Proceed to step three to customize the email message and add optional reminders.

Email Settings

Step three of the process involves creating the Custom Email Subject and Custom Email Message for the Envelope Configuration. This text will be seen by each envelope recipient whenever this configuration is used.

1. **Custom Email Subject**: Type a custom subject for the Email.

2. **Custom Email Message**: Type a custom message for the Email.

3. **(Optional)**: Reminder Email Settings
    - **Reminder Enabled**: Check this box to set:
        - **Days before sending first reminder**: Type a number of days to wait before a reminder is sent.
        - **Days between reminders**: Type a number of days to wait between sending reminders.
    - **Expire Enabled**: Check this box to set:
        - **Days before envelope expires**: Type a number of days to wait before the envelope expires.
        - **Days to warn signers before expiration**: Type a number of days to wait before recipients are warned.

Step three of the process is complete. Custom email settings are added. The email subject, email message and any reminders will be applied to any envelopes using this configuration. Proceed to step four to add the individuals and Signing Groups who will receive envelopes from the configuration.

Add Recipients and Signing Groups

Step four of the process involves adding recipients to the Envelope Configuration. This ensures that the correct people will receive envelopes in the correct signing order.

1. Click the **Add Recipient** button.

2. Choose from the menu:
   - **Quick Add**: The New Recipient dialog opens. Enter information for:
     a. Enter recipient information for **First Name**, **Last Name**, **Email** and **Role**.
     b. **Action**: Select a recipient action from the dropdown list:
        - **Needs to Sign**: Must sign the envelope.
        - **Receives a Copy**: Does not sign, but receives a copy of the completed envelope.
        - **Specify Recipients**: Can fill in the names and email addresses of other recipients.
        - **Allow to Edit**: Can make changes to the document.
        - **Update Recipients**: Can edit the details of any remaining recipients in the document.

     c. **(Optional)**: **Authentication**: Add a recipient phone number to enforce multi-factor security.
     d. **(Optional)**: **Private Message**: Write an additional message that only this recipient can see.
     e. Click the **Save Recipient** button to add the recipient to the configuration.
   - **Signing Group**: The Select DocuSign Signing Group dialog opens.
     a. Select **Signing Group** from the Add Recipient menu to add an existing group of recipients.
     b. Type a group name into the **Select DocuSign Signing Group** field to add a group of recipients.
3. **(Optional) Load Default Contacts**: Check this box to ensure that the default contacts for the Salesforce object type are loaded. These contacts will be loaded after the Custom Related Contacts.

Step four of the process is complete. Recipients are added to the Envelope Configuration. Proceed to step five to add documents to the configuration.

Add Documents and Templates

Step five of the process involves adding documents and templates to the Envelope Configuration. This is the content that is sent to recipients to review and sign.

1. Click the **Add Document** button.
2. Choose from the menu:
   - **File Upload**: Click to add a new document. The File Upload modal opens.
     a. Click the **Upload Files** button to locate a document saved on your device, or drag files to the **Or drop files** button from File Explorer or Finder.
     b. Click the **Done** button when the upload is complete.
   - **DocuSign Template**: Click to add a template to the configuration. The Select DocuSign Template modal opens.
     a. Select a template and click the **Add Template(s)** button.
3. **(Optional) Load Files**: All files attached to the Salesforce Object are added to the envelope.

4. **(Optional) Load Attachments**: All items in Salesforce Notes & Attachments are added to the envelope.

> **Note:** Load Attachments is typically used with the DocuSign Template option, because the documents are supplied by the template.

Step five of the process is complete. Documents and templates selected are added to the Envelope Configuration. Proceed to step six to add Custom Mappings to the configuration.

(Optional) Add Custom Mappings

Step six of the process is optional, and involves mapping a Salesforce Role to a DocuSign Role. For example, a Salesforce contact listed as **Decision Maker** can be tied to the DocuSign template Role of **Signer 1**.

1. Click the **Add Map** button.

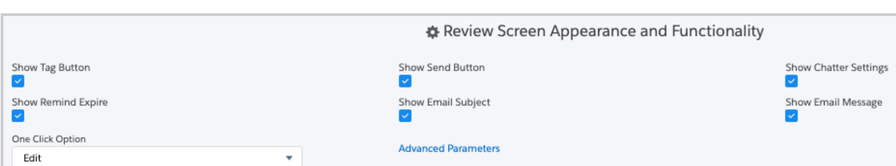
2. Choose from the menu:

- **Add Role Mapping**: Click to add a new role mapping. The New Custom Contact Role Mapping modal opens.
  - **a. Salesforce Role**: Type the name of an existing Salesforce Role.
  - **b. DocuSign Role**: Type the name of an existing Role in the connected DocuSign account.
  - **c.** Click the **Save** button.
- **Add Type Mapping**: Click to tie a Role to a recipient action (Needs to Sign, Receives a Copy, etc.) The New Custom Contact Type Mapping modal opens.
  - **a. Role**: Type the name of a Salesforce Role.
  - **b. Type**: Select a signer action from the dropdown menu. (Needs to Sign, Receives a Copy, etc.)
  - **c.** Click the **Save** button.

Step six of the process (optional) is complete. Role and Type mappings link Salesforce Roles with Roles from the connected DocuSign account. Proceed to step seven (optional) to add or remove options from the user interface.

(Optional) Review Screen Appearance and Functionality

Step seven of the process is optional and involves customizing the options that will appear for users interacting with the Envelope Configuration.



Check or uncheck the boxes for any of the following:

- **Show Tag Button**: Display tags in the user interface.
- **Show Send Button**: Give the user an option to manually select the Send button.
- **Show Chatter Settings**: Enable viewing Chatter content.

- **Show Remind Expire**: Display Reminder and Expiration fields.
- **Show Email Subject**: Allow editing of the Email Subject line.
- **Show Email Message**: Allow editing of the Email message contents.
- **One Click Option**: Choose Edit, Send or Tag in the dropdown to allow fast sending.
- **Advanced Parameters**: Allow adding customized envelope contacts.

Step seven of the process (optional) is complete. Options are added or removed from the Envelope Configuration user interface. Proceed to step eight (final) of the process to add the Envelope Configuration custom button to Salesforce object layouts.

Add Custom Button to Salesforce Layout

Step eight of the process involves adding an envelope configuration custom button to a Salesforce object layout.

In the upper-right of the page, click a button from the **Add to Object Layout** header:

- **Add Classic Button**: Add the Envelope Configuration button to a Salesforce Classic page layout.

  a. Click **Add Classic Button**
  b. Check the box for any Salesforce object to which the button should be added.
  c. Click the **Add to Layout** button.
- **Add Lightning Button**: Add the Envelope Configuration button to a Salesforce Lightning page layout.

  a. Click **Add Lightning Button**
  b. Check the box for any Salesforce object to which the button should be added.
  c. Click the **Add to Layout** button.

A banner notifies: **Success: DocuSign Envelope Configuration successfully saved.**

The process is complete. All steps of the Envelope Configuration process have been completed. The Envelope Configuration button is now available on any Salesforce object layouts to which it was added. Users can initiate a pre-configured signature process with the click of a button.

Envelope Configurations Basic Merge Fields for DFS CPQ

Per a customer request, Envelope Configurations should have a "Sending User" recipient type. Customers lost the ability to achieve this leveraging CRL and URL/ Javascript custom buttons which is not an option for them since they are trying to use this with Envelope Configurations + CPQ.

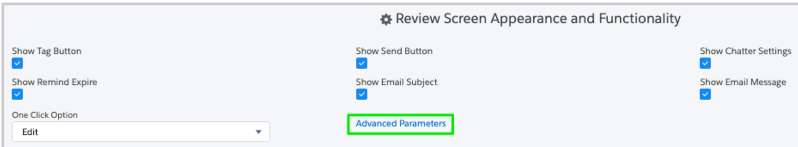
1. Click the App Launcher grid .

2. Click the **DocuSign eSignature for Salesforce CPQ** tile from the App Launcher menu.

3. Click the **DocuSign Envelope Configurations** tab.

4. Click the name of an existing DocuSign Envelope Configuration.

5. Click the **Advanced Parameters** link at the bottom of the page, under the Review Screen Appearance and Functionality header.



The Manage Advanced Parameters modal opens.

6. Click the plus  button in the lower-right.

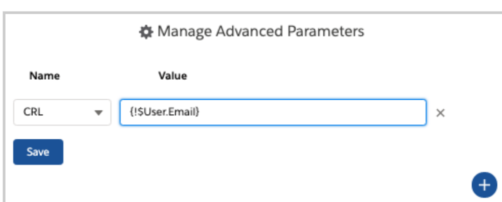
7. Select **CRL** (Custom Recipient List) from the **Name** dropdown menu:

> **Note:** Merge fields will be supported only for the following fields:
>
> - Email subject & message (CES/CEM)
> - CRL email, first name, last name, type, role, access code, SMS phone number, note, in-person signer, and signing group
>
> Click here for more information about customized envelope contacts.

8. Enter merge field syntax in the text field under the **Value** header.

Supported syntax:

- **{!$User.XX}** Current user properties. **Example: {!$User.Email}**
- **{!$Organization.XX}** Current org properties. **Example: {!$Organization.Phone}**
- **{!Object.Field}** Source object properties. **Example: {!Opportunity.Name}**
- **{!Object.Lookup.Field}** Master object properties via lookup. **Example: {!Opportunity.Account.Name}**



> **Note:** Values that resolve as NULL, or merge fields that cannot be resolved will result in an empty string replacement. FLS is enforced for the query via SOQL "WITH SECURITY_ENFORCED" clause.

9. Click the **Save** button.

A banner notifies: **Success DocuSign Envelope Configuration successfully saved.**

The process is complete. The DocuSign Envelope Configuration is updated with Salesforce merge fields.

Assigning DocuSign Envelope Configurations to Salesforce CPQ Templates

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DocuSign Envelope Configurations are built to standardize an envelope configuration for repeated use. They can also be matched with Salesforce CPQ templates for further streamlining repeated use. They can also be matched with Salesforce CPQ templates for further streamlining of the quote-and-sign process. Salesforce administrator access is required to perform these actions, as well as DocuSign administrator access. null

Creating a Salesforce CPQ template

Step one of the process involves creating a Salesforce CPQ template with which your DocuSign Envelope Configuration will be used.

1. Click the App Launcher grid .
2. Click the **Salesforce CPQ** tile from the App Launcher menu.
3. Select **Quote Templates** tab.
4. Click the **New** button to create a quote template.
5. Refer to the Salesforce article on **Building Your CPQ Documents with CPQ Templates** for more information.

The first step of the process is complete. You have created your CPQ template. Proceed to step two to assign a DocuSign Envelope Configuration to your Salesforce CPQ template.

Assign an Envelope Configuration to a Salesforce Quote Template

Step two of the process involves selecting an existing DocuSign Envelope Configuration to assign to your new Salesforce CPQ template.

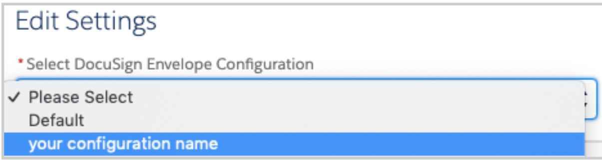
Note: You need to create at least one DocuSign Envelope Configuration to perform this task.

1. Click the **DocuSign eSignature for Salesforce CPQ** tab.

2. Click the **Edit Settings** button in the DocuSign Envelope Configuration section.

   The Envelope Configuration Settings window opens.

3. Select a configuration from the **Select DocuSign Envelope Configuration** dropdown.



4. Click the **Save** button.

   A banner notifies: **Successfully saved configuration.**

5. Click the button to close the window.

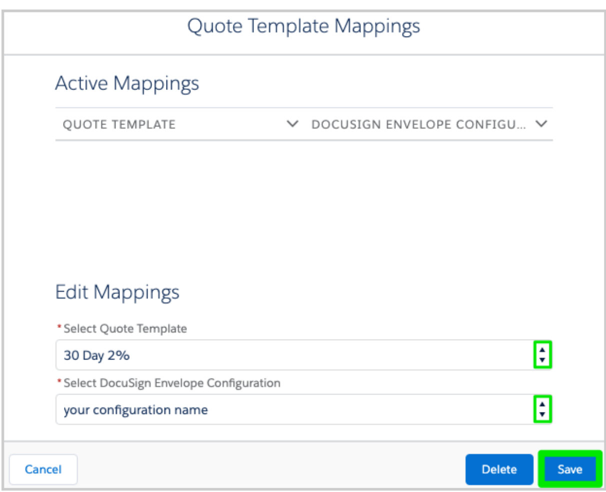
> **Note:** If you have multiple quote templates, you can make and assign a different DocuSign Envelope Configuration for each template.

6. Click the **Edit Mappings** button in the Quote Templates section.

   The Quote Template Mappings page opens.

7. **Select Quote Template**: Select a template name from the dropdown.

8. **Select DocuSign Envelope Configuration**: Select a configuration name from the dropdown.



9. Click the **Save** button.

   A banner notifies: **Mappings updated successfully.**

10. Click the button to close the window.

Step two of the process is complete. A DocuSign Envelope Configuration is assigned to your Salesforce Quote template. This configuration pairing can now be used to send an envelope to recipients.

Send a Quote With a Salesforce CPQ Template

Salesforce CPQ templates paired with DocuSign Envelope Configurations can be used to send an envelope to recipients. This ensures that the correct DocuSign and Salesforce CPQ settings will be used each time the configuration is used.

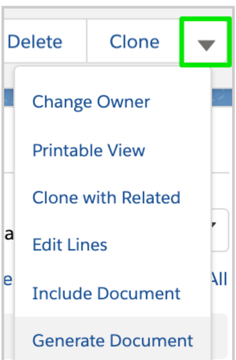
1. Select **Quotes** from App Menu.

2. Select a quote to be sent.

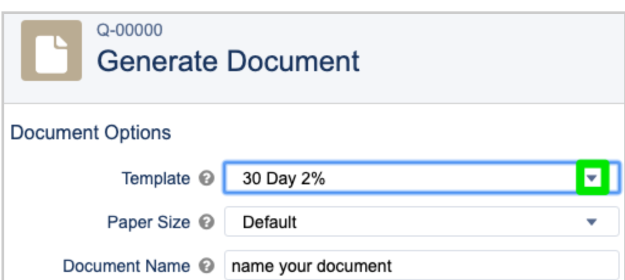
3. Click the arrow to the right of the **Clone** button in the upper-right of the page. A dropdown menu expands.

> **Note:** The button name may be different, but the arrow placement will be the same.

4. Select **Generate Document**.



5. Click the arrow and select the template to be used.



Optional: Click the **Paper Size** dropdown for a custom paper size.

Optional: Type a **Document Name**.

6. Click the **Send with DocuSign** button.

7. Click the **Confirm** button on the pop-up that asks Are you sure...? The signature configuration page opens.

8. Click the **Next** button in the lower-right of the page after making any needed adjustments to the envelope settings.

9. Drag-and-drop tags from the left-hand menu to the appropriate fields on the page.

   (Optional): Click the **Preview** link to get a final look at the document before sending.

10. Click the **Send** button in the lower-left of the page.

11. The **Documents Sent** screen opens to notify you that the envelope was successfully delivered.

The process is complete. Your integrated Salesforce CPQ template and DocuSign Envelope Configuration have successfully been used to send an envelope to a recipient.

Set Up Payment Account

Important:

This guide applies to the standalone (Legacy) DocuSign eSignature for Salesforce app. This app has been de-listed from the Salesforce App Exchange. It has been replaced by the new DocuSign eSignature for Salesforce app from the DocuSign Apps Launcher package of apps.

DocuSign will continue to support legacy users. The legacy app will no longer be developed, but we will continue to fix issues.

To upgrade, install the new DocuSign eSignature for Salesforce app.

DocuSign eSignature for Salesforce now allows the addition of payment fields to quote templates accounts, enabling a recipient to sign and pay in the same interface. Organizations are required to have an active Electronic Signature Plugin as well as Salesforce CPQ Summer 19 and DocuSign eSignature for Salesforce CPQ 2.0 to utilize this feature.

Step 1: Enable Payments in your DocuSign Account

Step one of the process involves enabling the feature in your DocuSign account.

1. Log in to your DocuSign account as an Administrator.
2. Select the **Admin** tab at the top of the page.
3. Select the **Payments** link under the Integrations header in the left-hand navigation pane.
4. Select the **Enable Payments** button.
5. Select the **Add** button.
6. Select the **Authorize.net** option.
7. Enter a payment **Name**.
8. Authenticate with Salesforce Administrator credentials.
9. Select the **Save** button.
10. Record the **Gateway Account ID** value for later use.

Step one of the process is complete. The Payments option is enabled in your DocuSign account. Proceed to step two: Step 2: Add Payment Gateway into Salesforce Org

Step 2: Add Payment Gateway into Salesforce Org

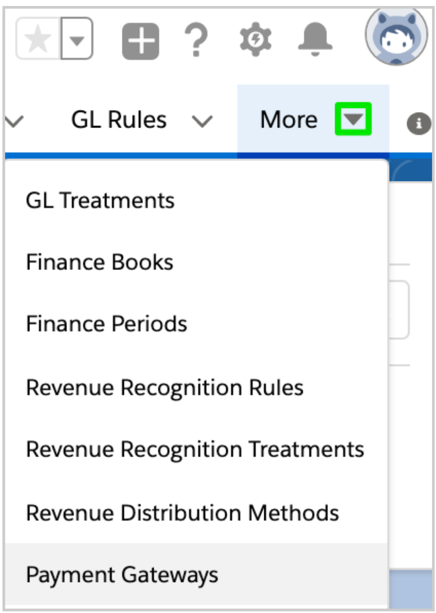
Step two of the process involves choosing the payment authorization method with which your transactions will be processed.

1. Log into your Salesforce org as an Administrator.

2. Select the App Launcher grid .

3. Select the **Salesforce Billing Configuration** tile in the All Apps menu.

4. Select the arrow to the left of the **More** tab and select **Payment Gateways**,from the dropdown menu.



5. Select the **New** button in the upper-right of the page.

6. Enter: **payments_salesforce** in the Payment Gateway Name field.

7. Select: **AuthorizeDotNet** from the Gateway Type dropdown menu.

> **Note:** Currently, only the Salesforce Authorize.Net payment type is supported.

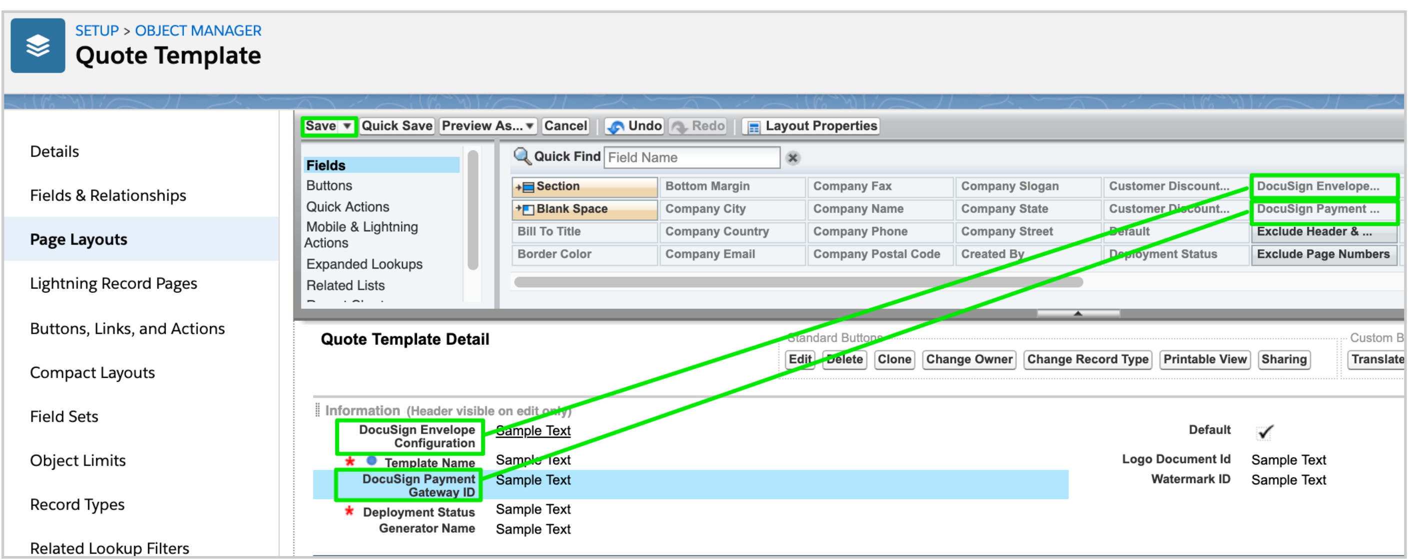
8. Select the **Save** button.

Step two of the process is complete. The new payment gateway is present in your Salesforce org and can be used to allow payments. Proceed to step three: Step 3: Add Payment Fields to Quote Template Page Layout

Step 3: Add Payment Fields to Quote Template Page Layout

Step three of the process involves updating your Salesforce quote template page layouts so that the contain the payment fields.

1. Log into Salesforce as an Administrator.
2. Select the gear in the upper-right of the page.
3. Select **Setup**.
4. Enter **Object Manager** in the Quick Find field.
5. Select the **Object Manager** link.
6. Select the **Quote Template** link in the Object Manager menu.
7. Select the **Page Layouts** link.
8. Select the link for the layout to be modified under the **Page Layout Name** header.
9. Add the following items to the Quote Template page layout:
   - DocuSign Envelope Configuration
   - DocuSign Payment Gateway ID
10. Select the **Save** button in the upper-left of the Quote Template page layout.

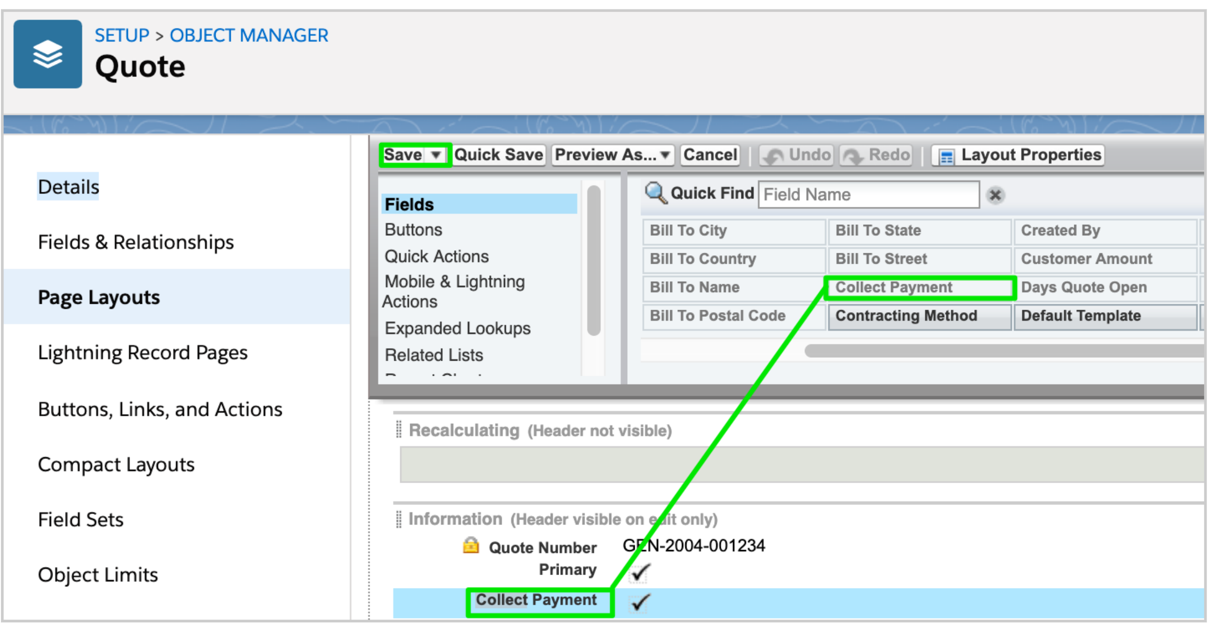


Step three of the process is complete. The DocuSign Envelope Configuration and DocuSign Payment Gateway ID fields are added to the Quote Template page layout. Proceed to step four: Step 4: Add Payment Fields to Quote Page Layout

Step 4: Add Payment Fields to Quote Page Layout

Step four of the process involves updating your Salesforce quote page layouts so that the contain the payment fields.

1. Enter **Object Manager** in the Quick Find field.
2. Select the **Object Manager** link.
3. Select the **Quote** link in the Object Manager menu.
4. Select the **Page Layouts** link.
5. Select the link for the layout to be modified under the **Page Layout Name** header.
6. Add the following items to the Quote Template page layout:
   - Collect Payment
   - Save Payment Method
7. Select the **Save** button in the upper-left of the Quote Template page layout.



Step four of the process is complete. The Collect Payment and Save Payment Method fields are added to the Quote page layout. Proceed to (optional) step five: Configure DocuSign eSignature for Salesforce and Salesforce CPQ for Payments

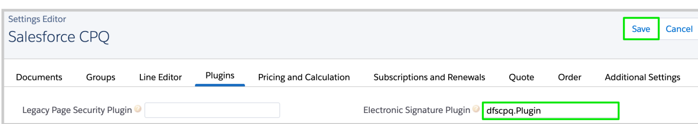
Configure DFS CPQ and Salesforce CPQ for Payments

The fifth part of the process involves configuring the DocuSign eSignature for Salesforce and Salesforce CPQ apps for payments.

1. Log into your Salesforce org as an Administrator.
2. Click the App Launcher grid .
3. Click the **DocuSign eSignature for Salesforce CPQ** tile in the All Apps menu.
4. Click the **DocuSign CPQ Settings** tab.
5. Click the **Salesforce CPQ Settings** button to the right of the Electronic Signature Plugin header.
6. Click the **Plugins** header.
7. Type **dfscpq.Plugin** in the Electronic Signature Plugin field.

   > **Note:** If this field is already configured, click the **Cancel** button. No further action is needed.

8. Click the **Save** button.



The fifth part of the process is complete. You have successfully configured the DocuSign eSignature for Salesforce and Salesforce CPQ apps for payments. Proceed to step six: Configure Payment Settings

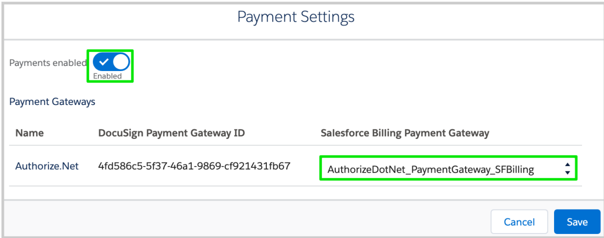
Configure DFS CPQ Payment Settings

The sixth part of the process involves enabling the payments feature and setting the authorization method.

1. Click the **DocuSign CPQ Settings** tab.
2. Click the **Edit Settings** button to the right of the **Payment Settings** header.
3. Click the **Payments Enabled** switch in the upper-left to activate the feature.
4. Select the **Authorize.Net** option under the Salesforce Billing Payment Gateway header.

   Note: This requires prior installation of the **Salesforce Authorize.Net** billing package. This is currently the only payment option available.

5. Click the **Save** button.



The sixth part of the process is complete. The payment pathways for DocuSign and Salesforce are configured. Proceed to step seven: Configure Quote Template Settings

Configure DFS CPQ Quote Template Settings

The seventh and final step of the process involves allowing the payment method to be set in the quote template.

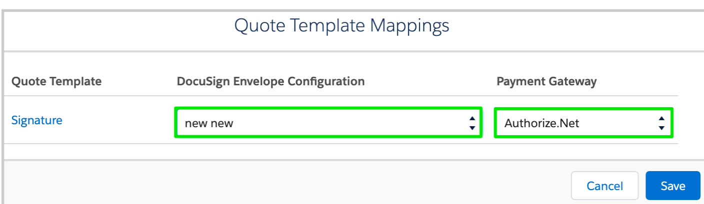
1. Click the **DocuSign CPQ Settings** tab.

2. Click the **Edit Settings** button to the right of the **Quote Template Settings** header.

3. Under the **DocuSign Envelope Configuration** header, select an option from the dropdown menu, if necessary.

4. Select the **Authorize.Net** dropdown option under the Payment Gateway header.

5. Click the **Save** button.



The seventh and final step of the process is complete. The quote template settings now allow for use of the Authorize.Net payment gateway. Your Salesforce org is now configured to allow your customers to pay you at signing, and to save their payment information on your Salesforce record page for future transactions.

Create a DocuSign Envelope Configuration (Optional)

This optional part of the process is configured only if you wish to use Payments in conjunction with a DocuSign Envelope Configuration. If so, follow these instructions to Assign DEC to CPQ Templates.

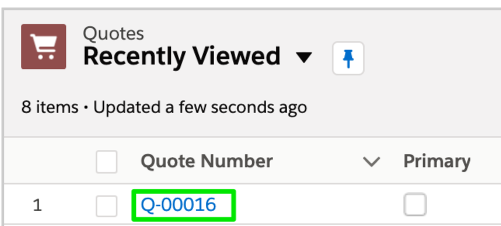
Send a Quote

This topic describes how to send a quote using DocuSign eSignature for Salesforce CPQ and Salesforce CPQ. The following steps assume you have successfully installed and configured Salesforce CPQ, DocuSign eSignature for Salesforce 7.0, and DocuSign eSignature for Salesforce CPQ.

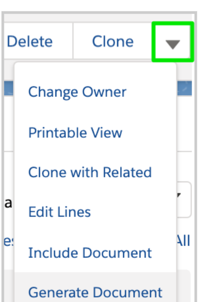
> **Note:** It's easy to confuse Salesforce CPQ quotes with standard Salesforce quotes. If you have both enabled, be sure that you are using the ones in the SBQQ namespace.

Follow these steps to send a quote:

1. Click the App Launcher grid.
2. Click the **Salesforce CPQ** tile.
3. Click the **Quotes** tab.
4. Click the link of the quote you want to send under the **Quote Number** header.



5. In the upper right, click the arrow and select the **Generate Document** option from the dropdown menu.

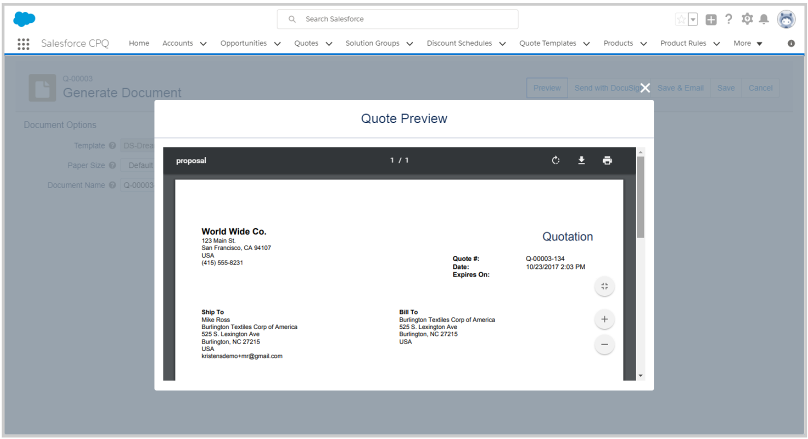


6. Create your new quote by setting **Document Options**:

- **Template**: Choose a template to apply to the quote from the dropdown.

> **Note:** Choose a quote template that has DocuSign AutoPlace fields (anchor tags) added.

- **Paper Size**: Select a paper size for the quote from the dropdown.
- **Document Name**: Type a new name for the generated document.



7. Click the **Preview** button in the upper right to see the documents to be sent. Click the **X** in the upper-right of the page to close the preview.

8. Click the **Send with DocuSign** button in the upper-right of the page.

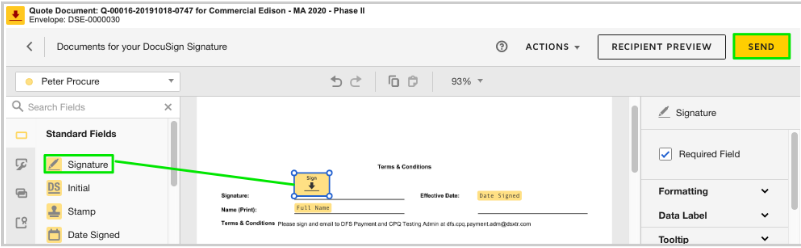
9. Click the **Confirm** button on the Send with DocuSign modal.

10. Set up the envelope by adding recipients, additional documents, the message to recipients, and other settings.

11. Click the **Next** button. The DocuSign fields page opens.

> **Note:** If a matching template for a document in the quote exists, you'll see a dialog asking whether to apply the template. Refer to the DocuSign eSignature for Salesforce User Guide for help with setting up and sending the quote envelope.

12. Add fields for each recipient by dragging tags from the left-hand navigation bar to the document.



> **Note:** If a matching template for a document in the quote exists, you'll see a dialog asking whether to apply the template. Refer to the DocuSign eSignature for Salesforce User Guide for help with setting up and sending the quote envelope.

13. Click the **Send** button to send the envelope.

The process is complete. The custom quote has been sent to the recipient(s).