360 SmartDocs

eSignature Integration Guide

PRODUCT GUIDE • VERSION 1.0

Table of Contents

1. About This Guide

1.1 Overview

360 SmartDocs is a document generation application by 360 Degree Cloud Technologies, available on the Salesforce AppExchange. It creates documents (PDF, DOCX, PPTX, etc.) directly from Salesforce records and stores them under **Files** and **Notes & Attachments** on the record.

Once a document is generated by 360 SmartDocs, it often needs to be signed. This guide explains how to use three of the most popular eSignature apps to sign those generated documents:

- **Dropbox Sign** (formerly HelloSign) — by Dropbox
- **DocuSign** — industry-standard eSignature platform
- **Conga Sign** — by Conga, native to Salesforce

Each section below is written step-by-step with screenshots so that any user, technical or non-technical, can follow along.

1.2 Prerequisites

Before you begin, confirm the following are in place:

- **360 SmartDocs** is installed and configured in your Salesforce org.
- The eSignature app you want to use (Dropbox Sign, DocuSign, or Conga Sign) is installed from the Salesforce AppExchange and connected to an active account.
- You have generated at least one document using 360 SmartDocs, and it is visible under **Notes & Attachments** or **Files** on the relevant record.
- Your user profile has permission to use both 360 SmartDocs and the chosen eSign application.

> **Tip:** All three eSignature apps read directly from the Salesforce record, so you never need to download and re-upload the generated document.

2. Dropbox Sign (HelloSign) Integration

Dropbox Sign, previously known as HelloSign, is an eSignature app owned by Dropbox. It integrates smoothly with Salesforce and works with documents generated by 360 SmartDocs.

2.1 Overview

When a document is generated by 360 SmartDocs, it is saved under the record's **Notes & Attachments** and **Files** sections. Dropbox Sign can pick up these files directly, so there is no need to download and re-upload the document.

2.2 Locate the Generated Document

Open the Salesforce record (for example, an Account) where the 360 SmartDocs document was generated. Scroll to the **Notes & Attachments** section to confirm that the document is available.

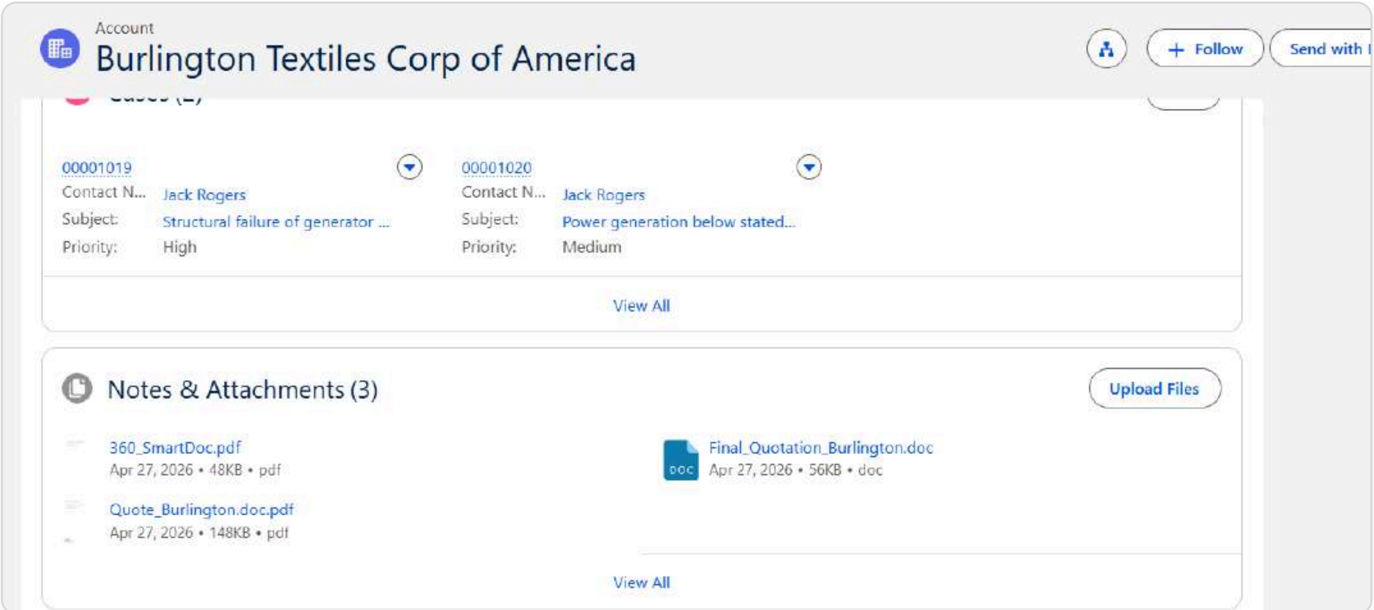

Figure 2.1 — Generated documents shown under Notes & Attachments on the Burlington Textiles Corp account.

> **Note:** The files shown here (such as `360_SmartDoc.pdf`, `Quote_Burlington.doc.pdf`, and `Final_Quotation_Burlington.doc`) were produced by 360 SmartDocs. Dropbox Sign will read these same files as its source.

2.3 Launch Dropbox Sign from the Record

From the same Salesforce record, click the **Use Dropbox Sign** button (usually located in the highlights / button bar at the top of the record page).

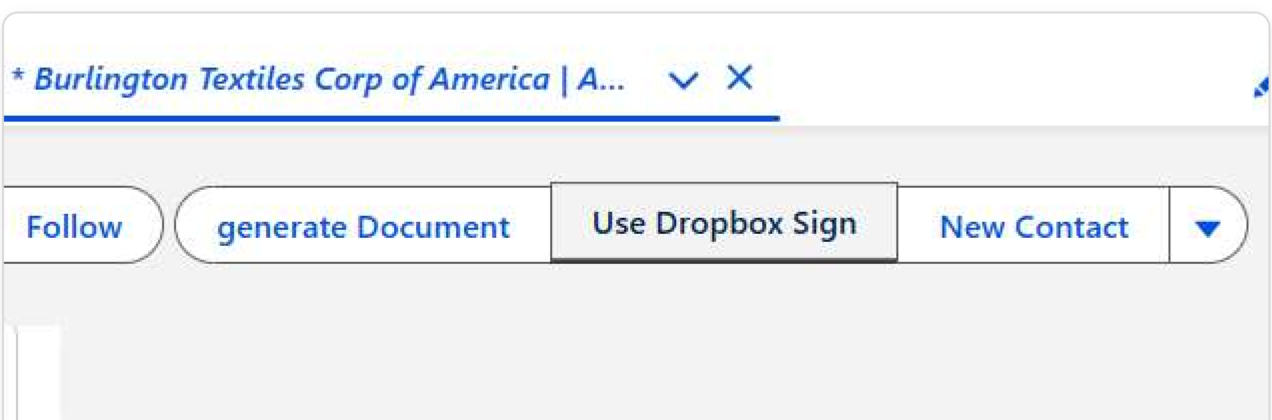

Figure 2.2 — "Use Dropbox Sign" button on the record page.

2.4 Choose How to Send

Dropbox Sign will open inside Salesforce and present two options:

- **Create a template** — for reusable signing workflows you plan to use repeatedly.
- **Send a one time document** — for a single signing request using the current record's files.

For a one-off signature request on a 360 SmartDocs output, click **Start** under "Send a one time document".

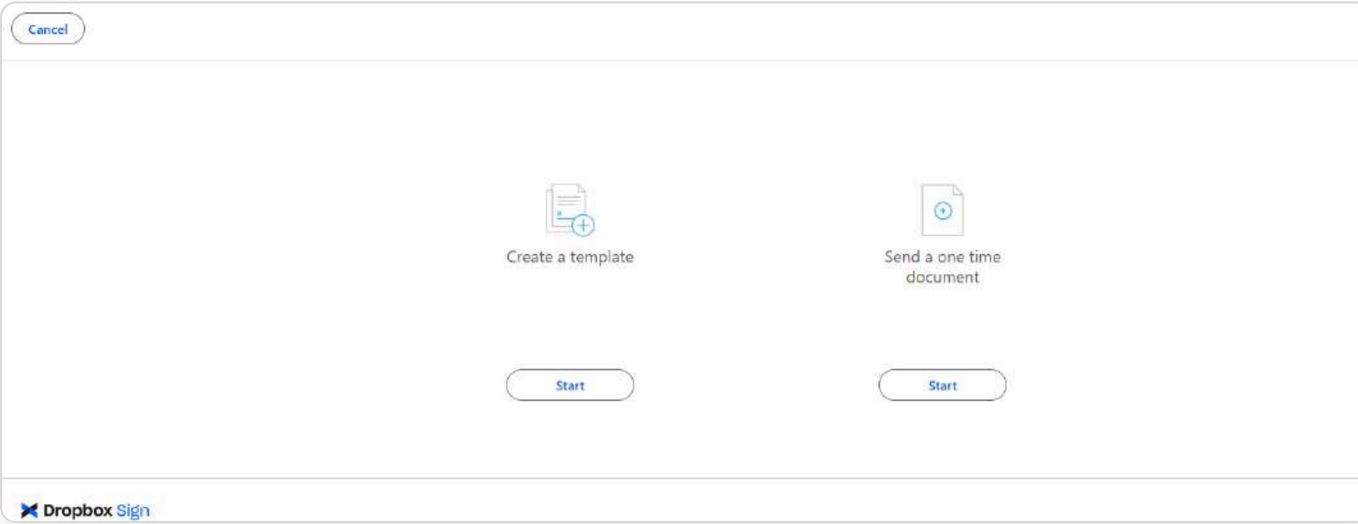

Figure 2.3 — Choose "Send a one time document" for 360 SmartDocs files.

2.5 Step 1 of 3 — Select Documents

Dropbox Sign will show all files attached to the record. You can either drag and drop a new file, or (recommended) tick the file that was generated by 360 SmartDocs under "Or Select Files On The Record".

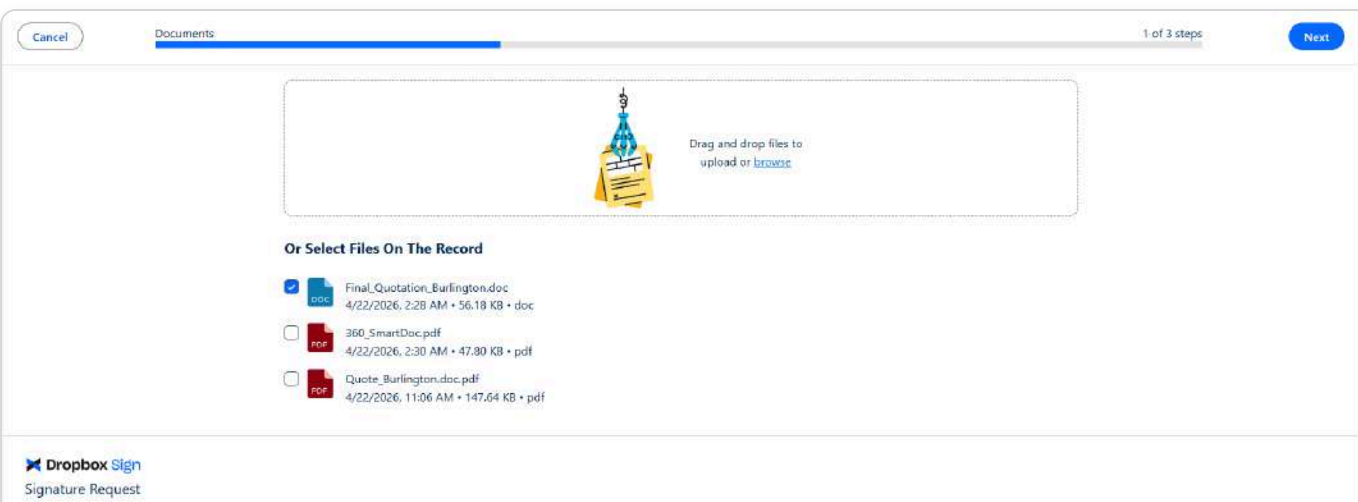

Figure 2.4 — Select the 360 SmartDocs file(s) you want to send for signature.

> **Note:** Only the files attached to this specific record appear here, so you do not have to search for your document manually.

Once the file(s) are selected, click **Next** (top right).

2.6 Step 2 of 3 — Add Recipients

On the Recipients screen, add one or more signers. Each row allows you to:

- **Type** — choose how the signer is identified. Three options are available:
  - **Manual** — type the signer's name and email address directly.
  - **Contact** — select an existing Salesforce Contact (the contact details auto-fill).
  - **User** — select an internal Salesforce User of your org.
- **Recipient** — the signer's name and email (auto-filled for Contact / User).
- **Action** — usually set to `Sign`.
- **Files** — optionally assign specific files to specific signers.

If more than one person needs to sign, click **Add Recipient** to add additional rows.

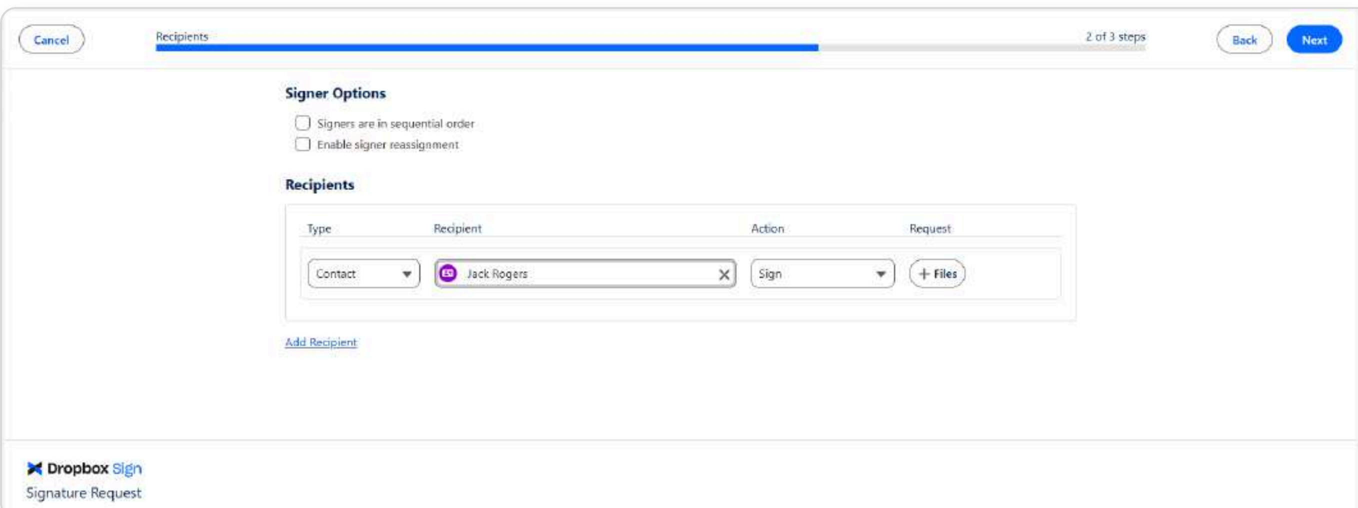

Figure 2.5 — Adding a recipient by selecting a Salesforce Contact (Jack Rogers).

Two useful options at the top:

- **Signers are in sequential order** — tick this if signers must sign in a specific order.
- **Enable signer reassignment** — allows a recipient to forward the request to someone else.

Click **Next** to proceed.

2.7 Step 3 of 3 — Prepare & Send

On the final step, Dropbox Sign opens a tagging editor where you can place fields directly on the document for each signer. Use the **Signer** dropdown on the left to switch between signers, then drag the fields each signer needs to complete:

- **Signature fields** — Signature, Initials.
- **Auto-fill fields** — Date signed, Full name, Email address, Company, and more.

Each placed field appears highlighted in light blue on the document. The right-hand panel lets you configure properties of the selected field (for example, whether the field is required, the field name, and formatting). When you are done, click **Send for signature**.

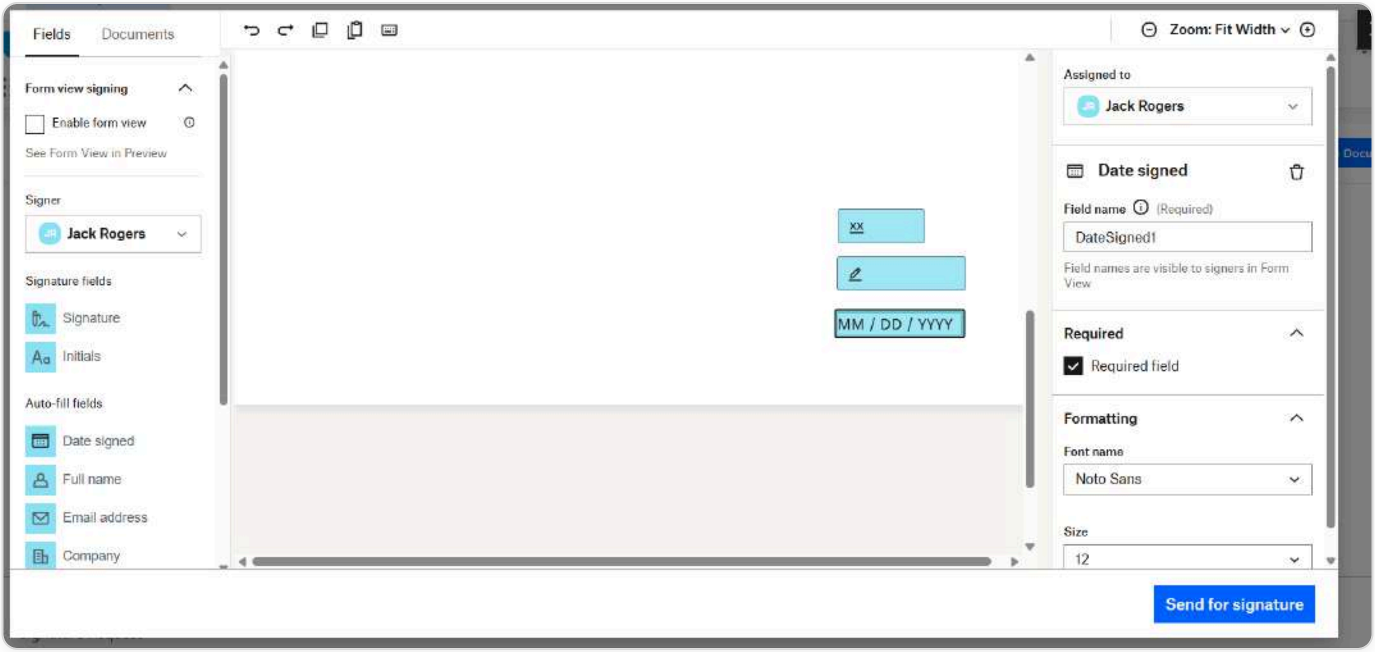

Figure 2.6 — Prepare & Send: place Signature, Initials, and Date Signed fields onto the document.

2.8 What the Signer Receives

Each recipient gets an email from Dropbox Sign with a **"Review & sign"** button. The email shows who requested the signature (the sender's name) along with the message you entered, so signers know what they are being asked to do before they click through.

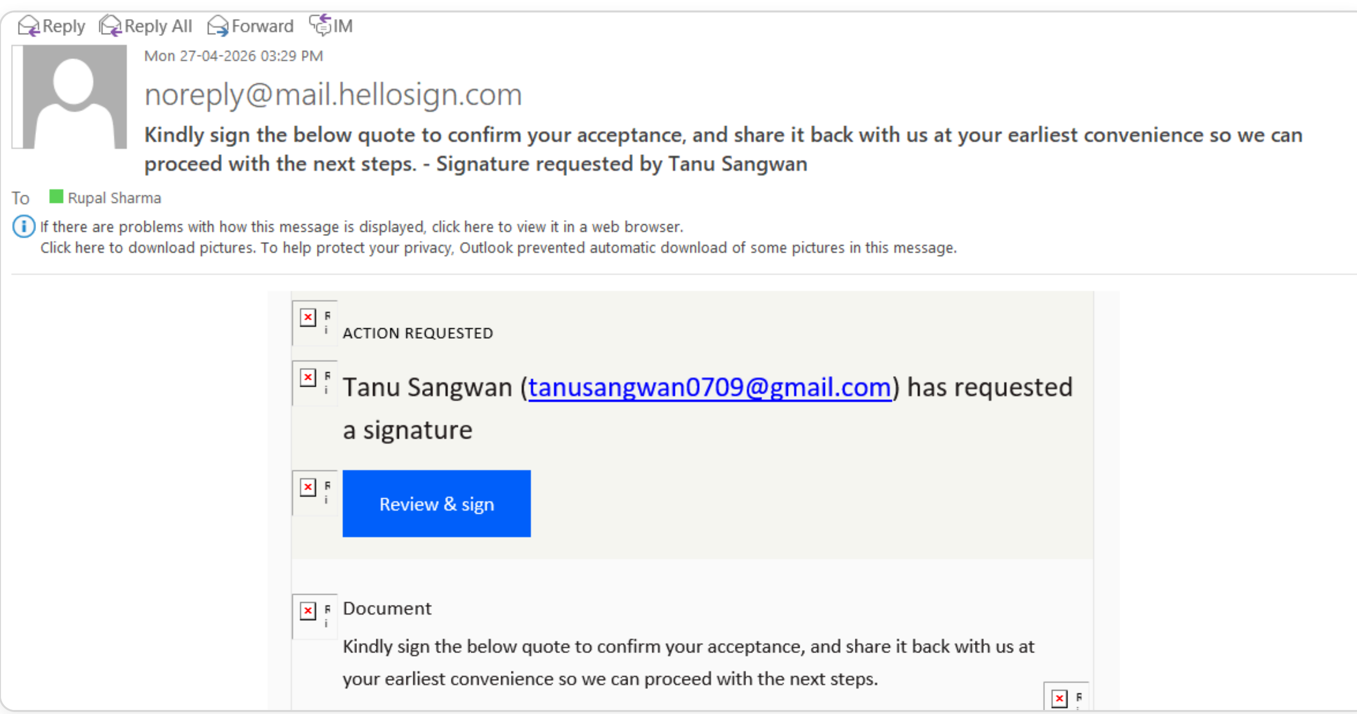

Figure 2.7 — Email the signer receives from Dropbox Sign with a "Review & sign" button.

Clicking **Review & sign** opens the document in a browser, where the signer fills in any fields you placed and applies their signature.

2.9 After Signing

Once all recipients have completed their signatures, Dropbox Sign automatically delivers the signed PDF back to Salesforce. The signed document appears under **Notes & Attachments** on the same record, alongside the original 360 SmartDocs files.

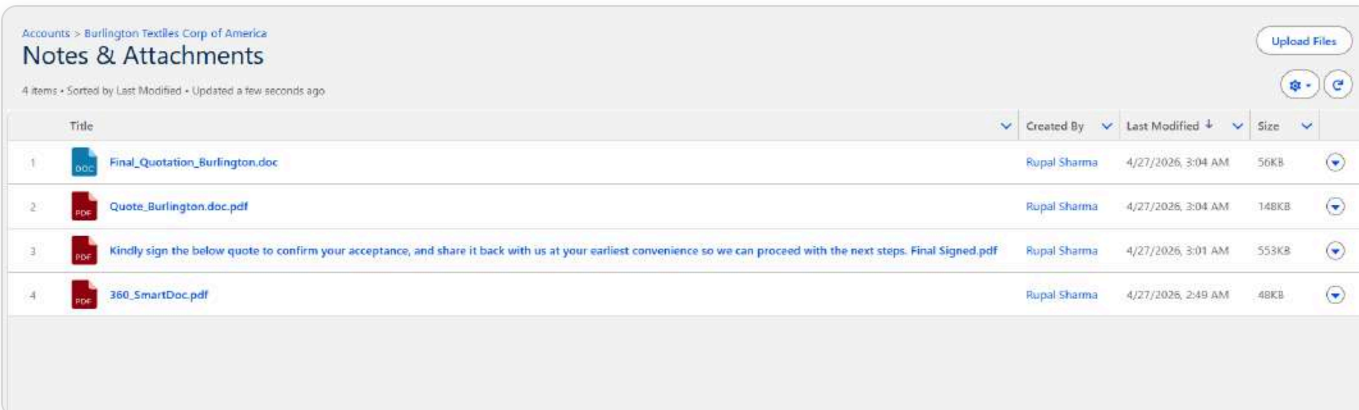

Figure 2.8 — The signed document is automatically returned to the record's Notes & Attachments list.

Opening the signed PDF shows the applied signature(s) along with a unique **Document ID** provided by Dropbox Sign for audit and verification purposes.

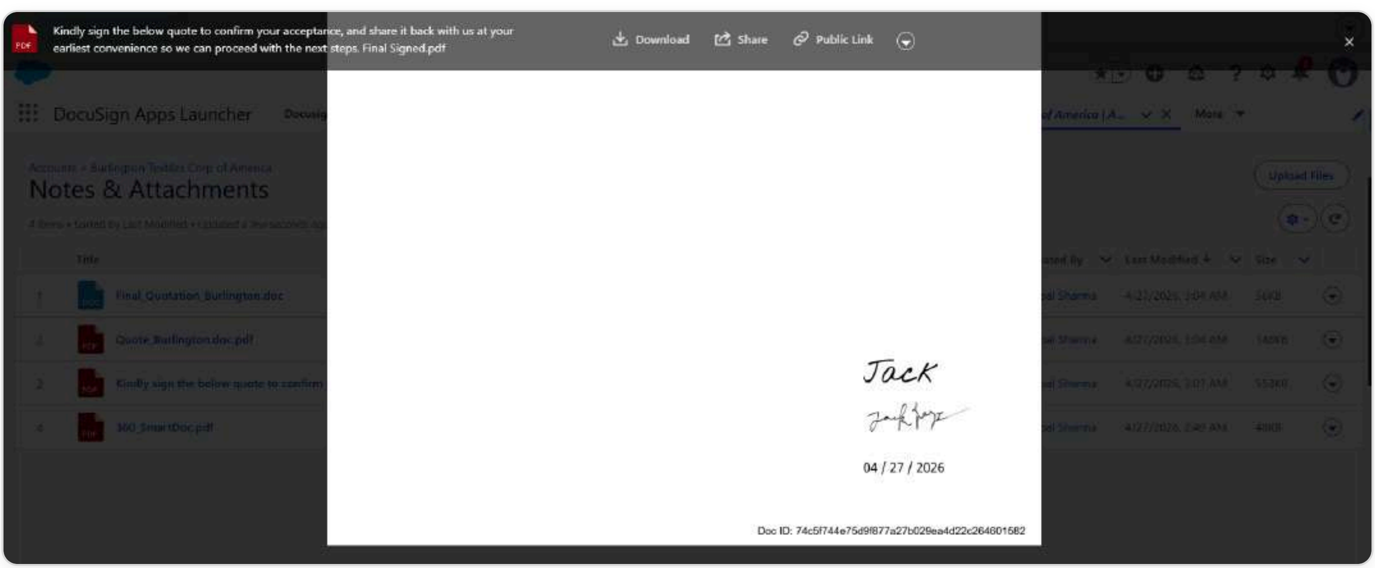

Figure 2.9 — The completed signed document showing the signature, signed date, and Doc ID footer.

2.10 Dropbox Sign — Quick Summary

1. Open the Salesforce record containing the 360 SmartDocs generated document.
2. Click **Use Dropbox Sign**.
3. Choose **“Send a one time document”** and click **Start**.
4. Select the 360 SmartDocs file from “Or Select Files On The Record” and click **Next**.
5. Add recipients (Manual, Contact, or User) and click **Next**.
6. Place **Signature**, **Initials**, and **Date Signed** fields on the document and click **Send for signature**.
7. The recipient receives an email and clicks **Review & sign** to complete signing.
8. Once all signers complete, the signed PDF returns automatically to **Notes & Attachments**.

3. DocuSign Integration

DocuSign is one of the most widely used eSignature platforms worldwide. Its Salesforce-native app (**DocuSign Apps Launcher**) integrates with records and allows you to send any file, including those generated by 360 SmartDocs, for signature.

3.1 Overview

The DocuSign Apps Launcher follows a three-step wizard similar to Dropbox Sign:

- **Documents** — pick the file(s) to send.
- **Recipients** — add the signer(s).
- **Prepare & Send** — tag fields and dispatch.

3.2 Launch “Send with DocuSign”

From the Salesforce record where the 360 SmartDocs document is attached, locate the document under **Notes & Attachments** first to confirm it is available.

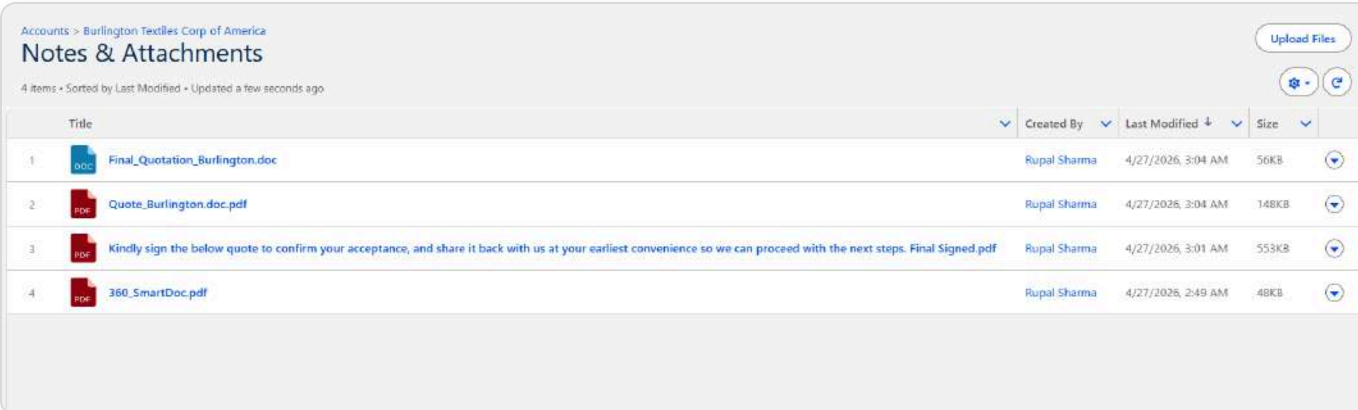

Figure 3.1 — Notes & Attachments list on the Burlington Textiles account, ready to be sent via DocuSign.

Then launch the **DocuSign Apps Launcher** (via the App Launcher or the DocuSign action button on the record) and choose **Send with DocuSign**.

3.3 Step 1 — Documents

On the Documents step, you will see a list of **Selected Documents**. To attach the 360 SmartDocs output, click **Add from Salesforce** and tick the relevant files from the record’s attachments. You can also use **Select Template** or **Upload** if needed.

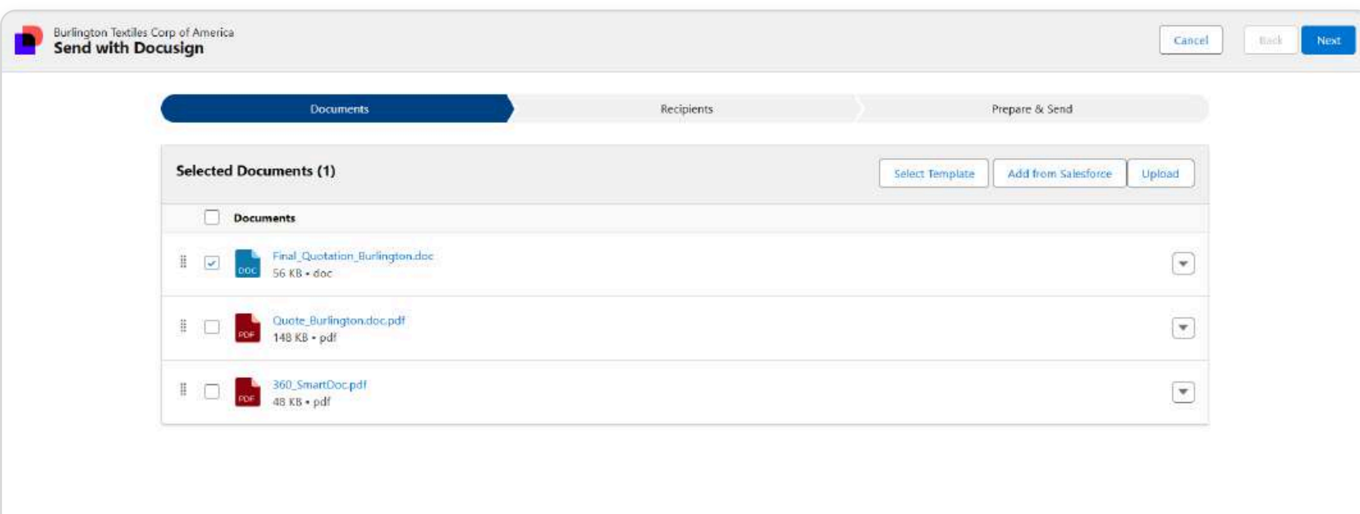

Figure 3.2 — Documents step in “Send with DocuSign” with the 360 SmartDocs file selected.

> **Note:** Use **“Add from Salesforce”** to pull in 360 SmartDocs files directly from the record’s Notes & Attachments / Files — no manual download required.

Once the documents are selected, click **Next** (top right).

3.4 Step 2 — Recipients

Click **Add Recipient** to open the recipient dialog. You can add recipients in three ways:

- **From Salesforce** — pick an existing User or Contact from your Salesforce org.
- **By Name & Email** — type in the recipient's name and email manually.
- **Signing Group** — use a predefined DocuSign signing group.

For each recipient, choose the **Action** (e.g., "Needs to Sign") and assign a **Role** such as Signer 1, Signer 2, etc.

Optional links in the same dialog:

- **Add Access Authentication** — require an extra verification step (e.g., SMS, access code).
- **Add Private Message** — send a personal note to that recipient only.

After adding all recipients, the Recipients screen summarises who will sign, their roles, and the email subject that will be sent.

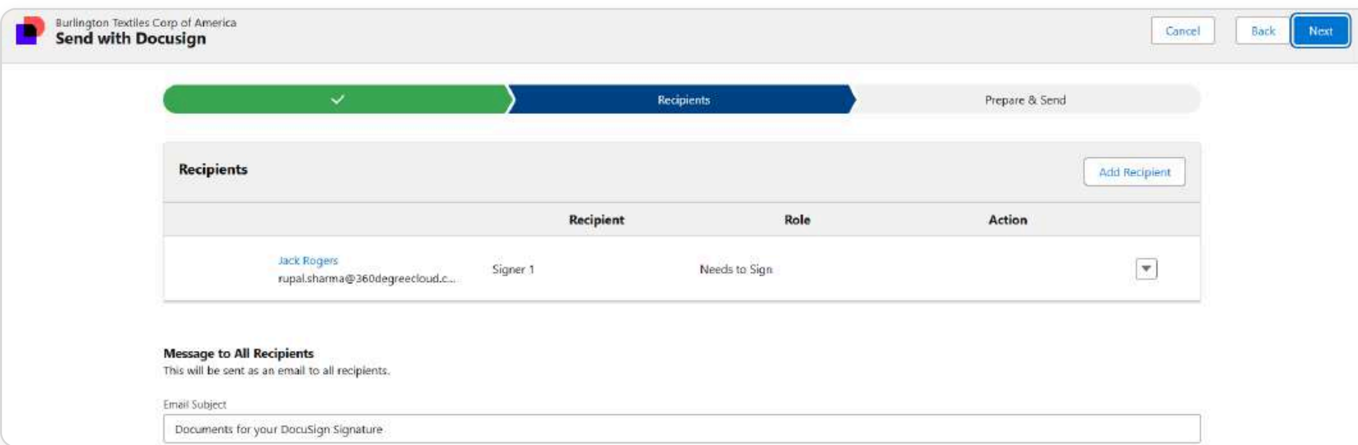

Figure 3.3 — Recipients summary showing the selected signer, role, and email subject.

Click **Next** to continue.

3.5 Step 3 — Prepare & Send

In the Prepare & Send step, DocuSign displays the document(s) with a **Standard Fields** panel on the left. Drag fields such as Signature, Initial, Stamp, Date Signed, Name, Email, Company, or Title onto the document where each recipient should act. Use the recipient dropdown at the top to switch between signers so that each person sees the fields assigned to them.

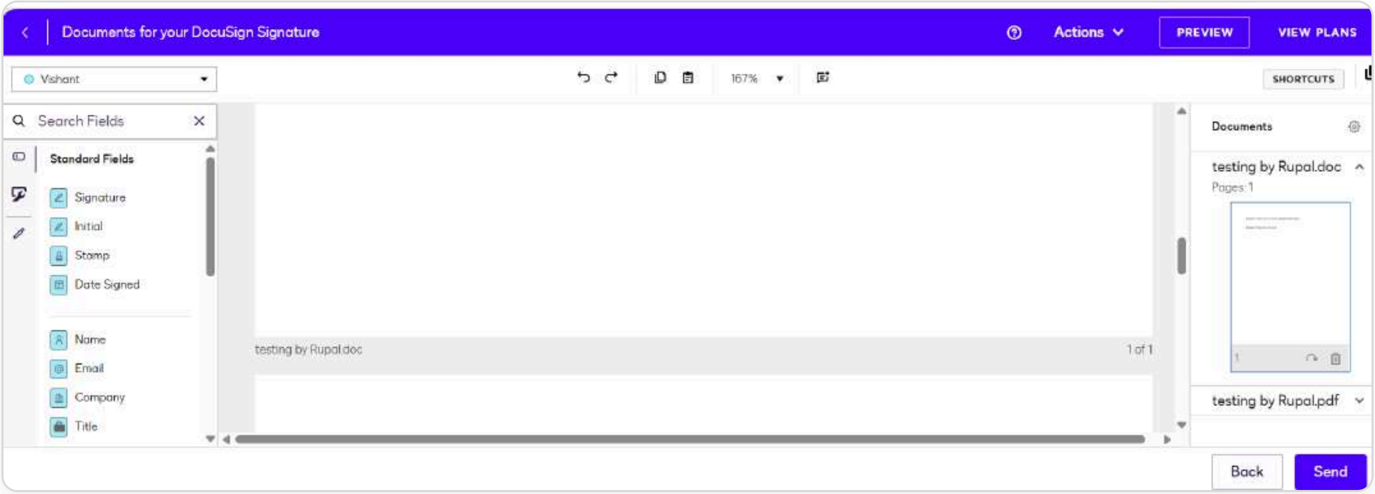

Figure 3.4 — Prepare & Send: drag Standard Fields onto the document for each recipient.

When the document is fully tagged, click **Send** (bottom right). DocuSign emails the recipients, and you will see a confirmation that the envelope was sent successfully.

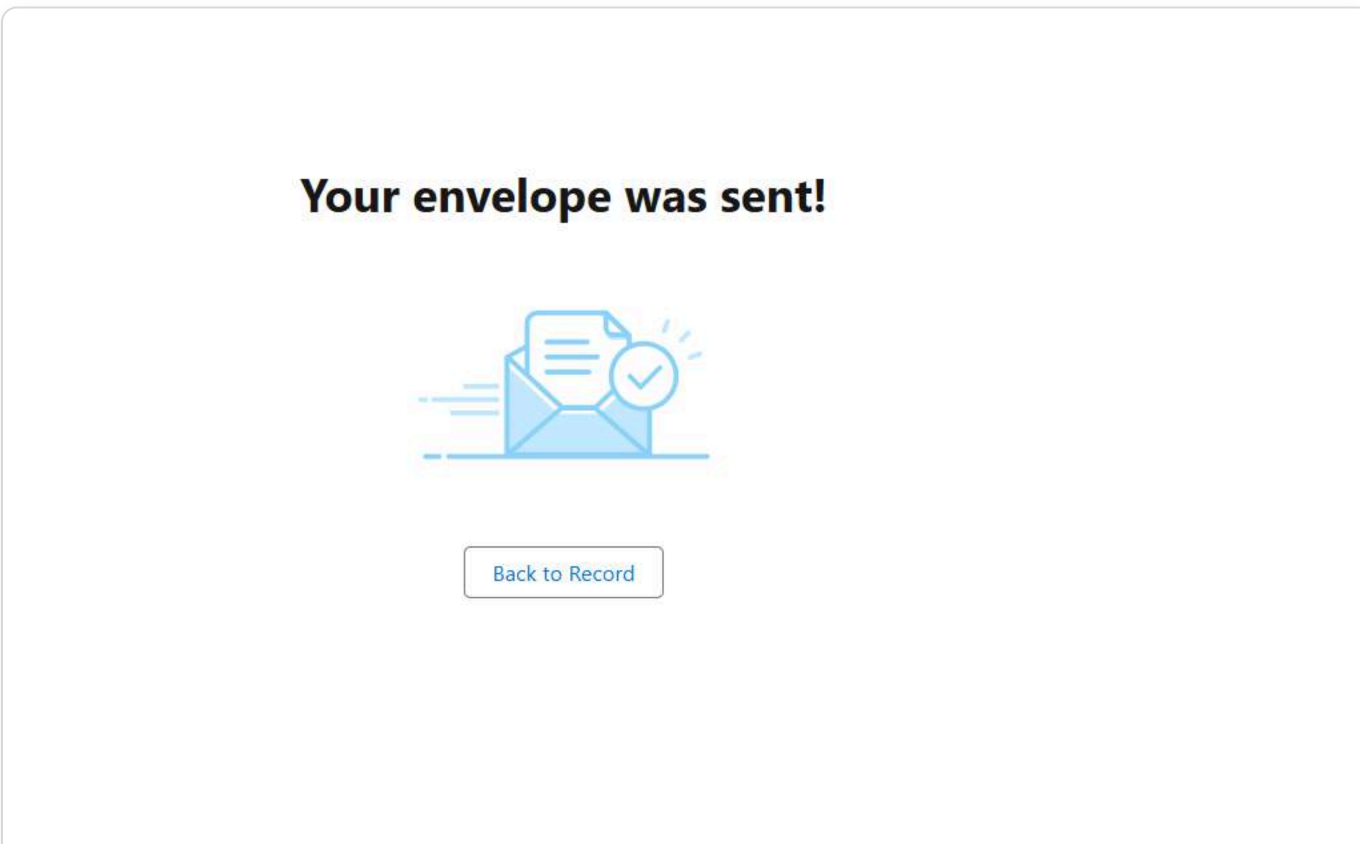

Figure 3.5 — Confirmation that the DocuSign envelope has been sent.

Click **Back to Record** to return to the Salesforce record.

3.6 What the Signer Receives

Each recipient receives an email from DocuSign (sent from an address such as `dse_NA@docusign.net`) with the subject you set on the previous step. The email includes a **Review Document** button that opens the document in DocuSign's signing experience.

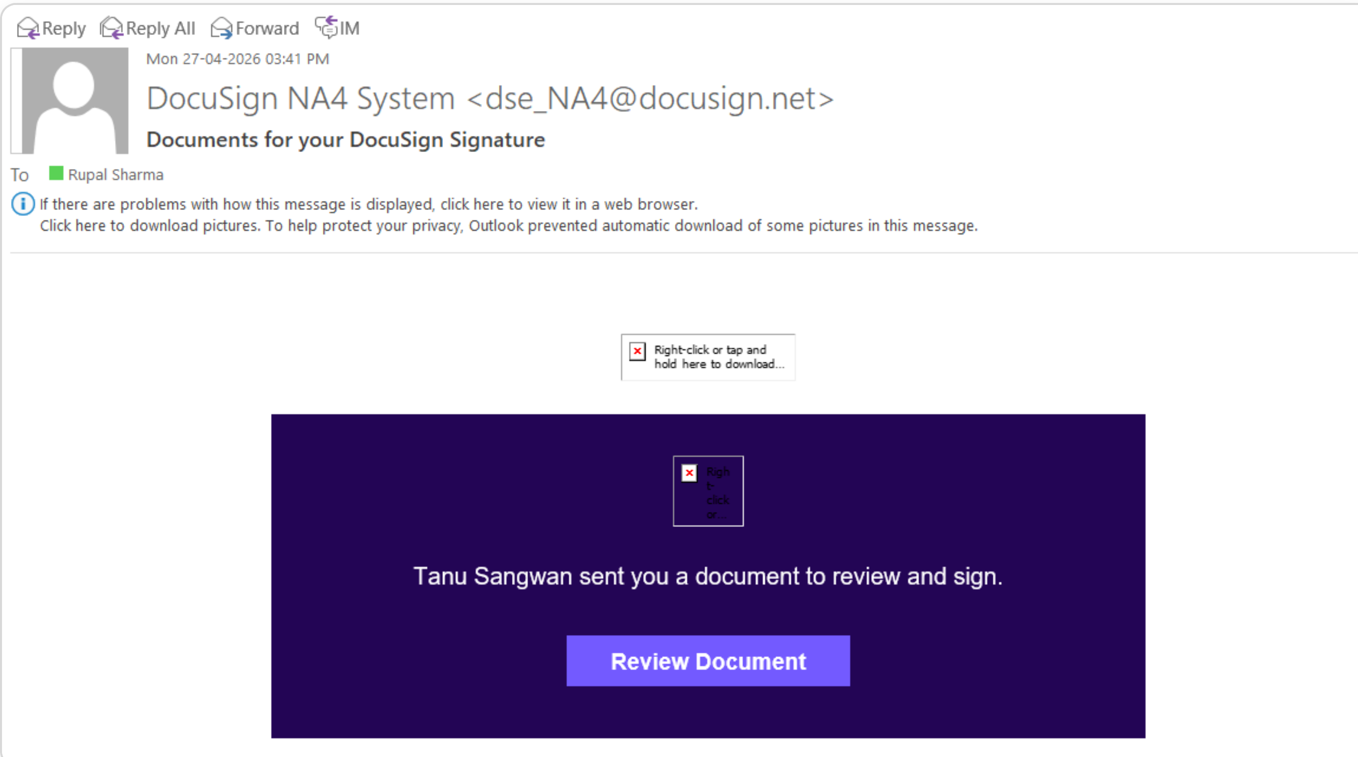

Figure 3.6 — Email the signer receives from DocuSign with a "Review Document" button.

When the signer clicks **Review Document**, they are guided through each field you placed and can apply their signature.

3.7 After Signing

Once all recipients have signed, DocuSign delivers the completed PDF back to Salesforce. The signed file appears under **Notes & Attachments** on the same record. Opening it shows the applied signature(s), the signing date, and a unique **DocuSign Doc ID** for audit verification.

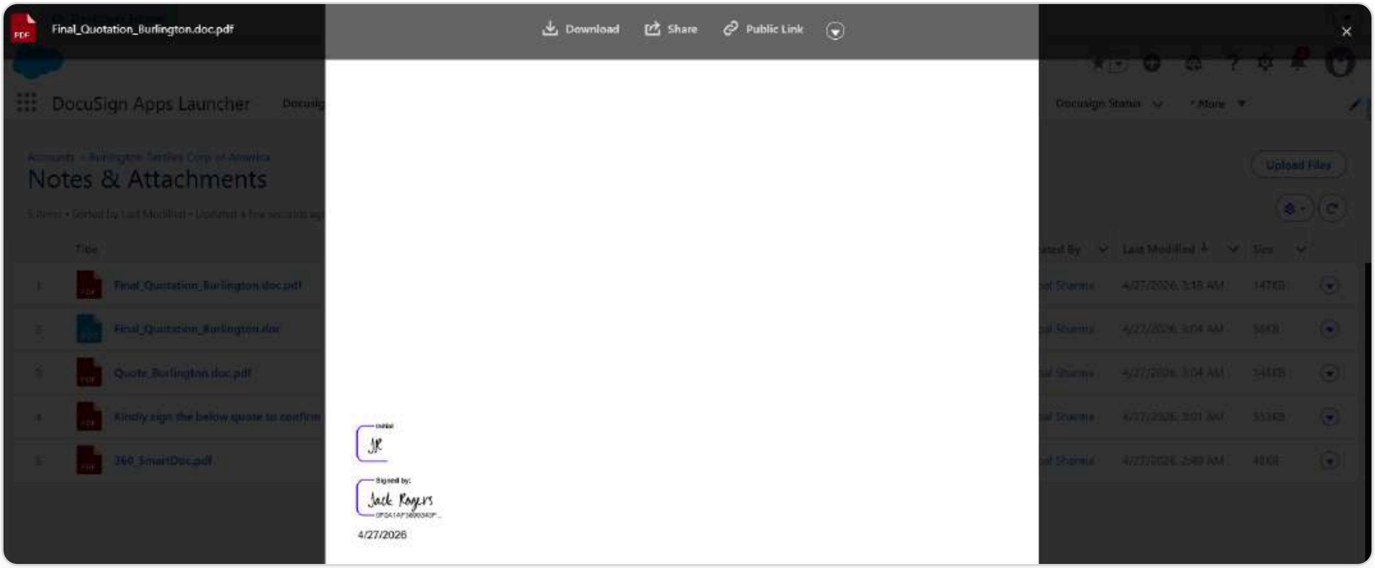

Figure 3.7 — Signed document returned to Notes & Attachments, showing the signer's initials, signature, and signing date.

You can also track the envelope's progress at any time via the **DocuSign Envelopes** and **DocuSign Status** tabs in the DocuSign Apps Launcher.

3.8 DocuSign — Quick Summary

1. Open the Salesforce record containing the 360 SmartDocs generated document.
2. Launch **Send with DocuSign** from the DocuSign Apps Launcher.
3. On the Documents step, click **Add from Salesforce** and select the 360 SmartDocs file(s).
4. On the Recipients step, click **Add Recipient** and choose *From Salesforce*, *By Name & Email*, or *Signing Group*.
5. Set each recipient's Action and Role, then click **Next**.
6. On the Prepare & Send step, drag the required **Standard Fields** onto the document for each signer.
7. Click **Send**. You will see "Your envelope was sent!" confirmation.
8. The recipient receives an email and clicks **Review Document** to sign.

9 Once all signers complete, the signed PDF returns automatically to **Notes & Attachments**. Track progress via **DocuSign Envelopes / DocuSign Status** tabs.

4. Conga Sign Integration

Conga Sign is an eSignature solution built by Conga and is natively integrated with Salesforce. Like Dropbox Sign and DocuSign, it can sign documents generated by 360 SmartDocs directly from the record, without downloading and re-uploading files.

> **Warning:** Screenshots for the Conga Sign flow have not been captured yet in the test environment. The steps below describe the standard Conga Sign + Salesforce experience and are safe to follow. Screenshots should be added to this section before distributing this guide externally.

4.1 Overview

Conga Sign follows the same high-level pattern as the other eSignature tools:

- Identify the 360 SmartDocs document on the Salesforce record.
- Launch Conga Sign from the record.
- Select the document(s), add recipients, tag fields, and send.
- Track status and receive the signed PDF back on the record.

4.2 Locate the Generated Document

Open the Salesforce record (Account, Opportunity, Contract, or any custom object) where 360 SmartDocs has produced the document. Confirm that the file is visible under **Files** or **Notes & Attachments** on that record.

> **Note:** Placeholder for screenshot — Record page with Notes & Attachments showing the 360 SmartDocs output file.

4.3 Launch Conga Sign from the Record

Click the **Conga Sign** button on the record page (this button is added during Conga Sign setup, either to the record highlights panel or to the page layout as a custom action). The Conga Sign **Send for Signatures** screen opens.

> **Note:** Placeholder for screenshot — Conga Sign button on the record page and the initial "Send for Signatures" screen.

4.4 Step 1 — Select Documents

Conga Sign shows the available files from the record. Tick the 360 SmartDocs generated file you want signed. If needed, you can also:

- Upload a new document from your computer.
- Add files from other Salesforce records or related lists.
- Use a Conga Sign template for recurring signature workflows.

Once the right file is selected, click **Next**.

> **Note:** Placeholder for screenshot — Conga Sign document selection showing the 360 SmartDocs file checked.

4.5 Step 2 — Add Recipients

On the Recipients step, add one or more signers. For each recipient you will typically provide:

- **Name** — full name of the signer.
- **Email** — email address where the signing request will be sent.
- **Role** — for example, Signer, Approver, or Carbon Copy (CC).
- **Signing Order** — if signers must sign in sequence, set the order; otherwise leave parallel.

Recipients can be pulled from Salesforce Users / Contacts / Leads, or added manually by typing a name and email.

> **Note:** Placeholder for screenshot — Recipients screen with two signers added, including role and signing order.

4.6 Step 3 — Tag the Document

In the tagging view, Conga Sign displays the document with a field palette. Drag the fields each recipient needs to complete onto the correct spots:

- Signature
- Initials
- Date signed

- Name / Email / Title / Company
- Text, checkbox, or dropdown fields for data capture

Use the recipient selector at the top to switch between signers and assign fields to the correct person.

> **Note:** Placeholder for screenshot — Conga Sign tagging view with Signature and Date Signed fields placed on the document.

4.7 Step 4 — Review and Send

Optionally add an email subject and a message that each recipient will see. Review the recipient list, the attached document, and the placed fields. When everything looks correct, click **Send**.

Conga Sign will email the signing link to the first recipient (or all recipients in parallel, depending on the signing order you chose).

> **Note:** Placeholder for screenshot — Review & Send screen showing email subject, message, and the Send button.

4.8 After Signing

As each signer completes the document, Conga Sign updates the transaction status in Salesforce. Once all signers have signed, Conga Sign:

- Generates a final signed PDF with all signatures and an audit trail.
- Attaches the signed PDF back to the originating record under **Files** / **Notes & Attachments**.
- Creates a **Conga Sign Transaction** record that tracks the full signing history.

You can monitor in-flight signing requests from the **Conga Sign Transactions** tab or from the related list on the record.

> **Note:** Placeholder for screenshot — Signed PDF attached to the record and Conga Sign Transaction record showing “Completed” status.

4.9 Conga Sign — Quick Summary

1. Open the Salesforce record containing the 360 SmartDocs generated document.
2. Click the **Conga Sign** button to launch “Send for Signatures”.

3 Select the 360 SmartDocs file(s) you want signed and click **Next**.

4 Add recipients (name, email, role, signing order) and click **Next**.

5 Drag **Signature**, **Initials**, and **Date** fields onto the document for each signer.

6 Review the request, optionally add a subject and message, then click **Send**.

7 Track progress via the **Conga Sign Transactions** tab; the signed PDF returns to the record automatically.

5. Compatibility Summary

All three eSignature applications work with documents generated by 360 SmartDocs because 360 SmartDocs saves its output to the standard Salesforce **Files** and **Notes & Attachments** locations, which each eSign app can read.

5.1 At-a-glance Comparison

Feature	Dropbox Sign	DocuSign	Conga Sign
Native Salesforce app	Yes	Yes	Yes
Reads 360 SmartDocs files from record	Yes	Yes	Yes
Signed PDF returns to record	Yes	Yes	Yes
Sequential signing order	Yes	Yes	Yes
Templates for repeat workflows	Yes	Yes	Yes
Recipient from Salesforce User/Contact	Yes	Yes	Yes
Audit trail / Document ID	Yes	Yes	Yes

Tip: All three tools are fully compatible with 360 SmartDocs. Choice typically comes down to licensing, regional availability, and which platform your organisation already uses.

6. Common Issues & Troubleshooting

6.1 The eSign button does not appear on the record

- Confirm the eSign app is installed and licensed for the user.
- Check that the button or Lightning action has been added to the page layout for that object.
- Verify the user profile has access to the eSign app's components.

6.2 360 SmartDocs file does not show up in the eSign document picker

- Confirm the document is visible in **Files** or **Notes & Attachments** on the record.
- Make sure 360 SmartDocs finished generating before launching the eSign app (avoid opening the eSign app during generation).
- Some eSign apps filter by file type — try generating in PDF format if a DOC/DOCX is not listed.

6.3 Recipient did not receive the email

- Double-check the email address typed in the recipient field.
- Ask the recipient to check spam / junk folders.
- Confirm in the eSign app's Envelope / Transaction record that the email status shows **"Sent"** rather than **"Failed"**.

6.4 Signed PDF does not come back to the record

- Check the envelope / transaction status — it must show **"Completed"** before the file is returned.
- Verify the eSign app's "write-back" or "return to Salesforce" setting is enabled.
- Confirm the integration user has permission to create Files / Attachments on that object.

6.5 Who to contact

Issue Area	Support Contact
360 SmartDocs (document generation, templates, field mapping)	360 Degree Cloud Technologies support
Dropbox Sign (sending, signing, account)	Dropbox Sign support
DocuSign (envelope, template, account)	DocuSign support
Conga Sign (transaction, signing, account)	Conga support

7. Glossary

Term	Definition
360 SmartDocs	A Salesforce AppExchange document generation app by 360 Degree Cloud Technologies that creates PDFs, DOCX, PPTX, and other files from Salesforce data.
AppExchange	Salesforce's marketplace for third-party applications.
Dropbox Sign	eSignature app by Dropbox, formerly known as HelloSign.
DocuSign	Leading eSignature platform; its Salesforce app is called DocuSign Apps Launcher.
Conga Sign	eSignature app by Conga, native to Salesforce.
Envelope (DocuSign)	A DocuSign term for the package of documents, recipients, and fields sent for signature.
Transaction (Conga Sign)	The Conga Sign equivalent of an envelope: one signing request and its history.
Recipient / Signer	The person who receives and signs the document.
Signing Order	Whether signers sign in sequence (one after another) or in parallel (all at once).
Audit Trail / Document ID	A unique identifier and log stored by the eSign provider to prove who signed what and when.