



DaDaDocs



# DaDaDocs for Salesforce

DaDaDocs guidebook for integration

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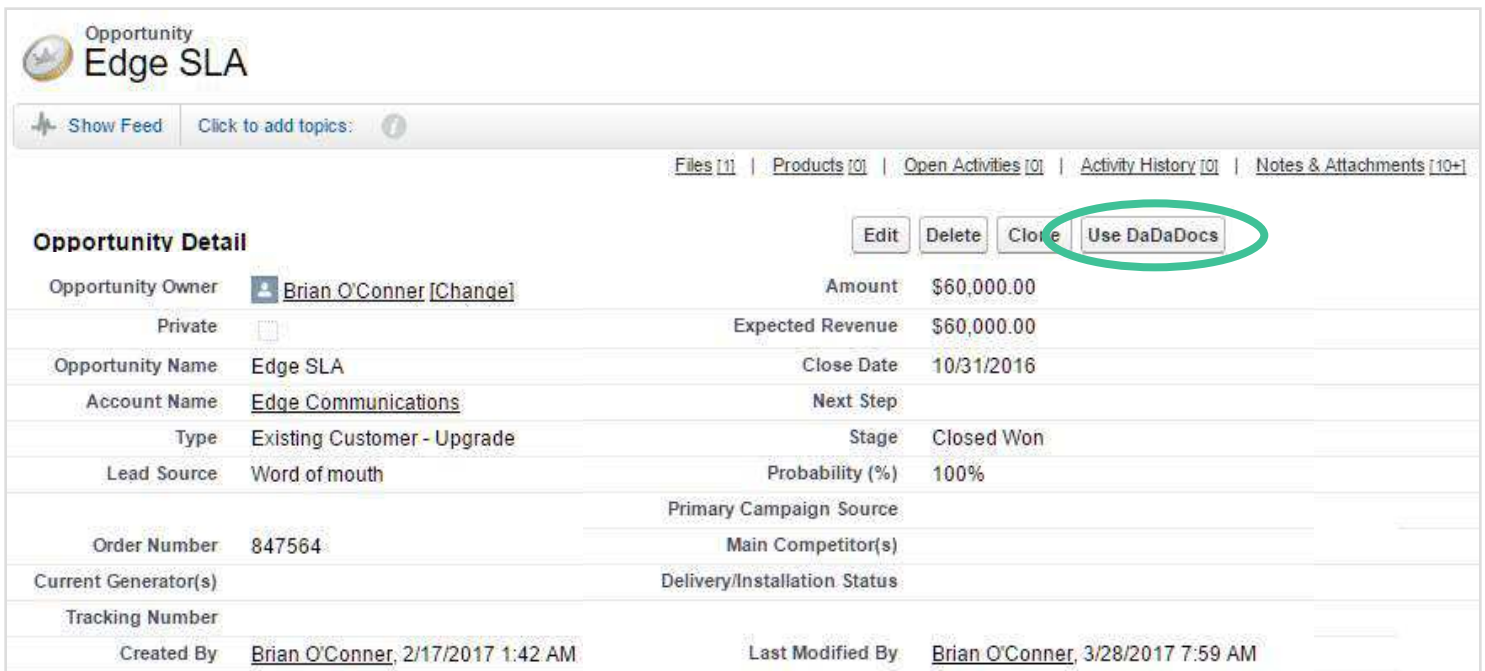
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# Salesforce Editor Guide

Using our intuitive, but powerful editor you can edit, annotate and sign PDF or Word attachment or Chatter file stored in Salesforce object.

Click on the required object and select the **Use DaDaDocs** button.



The screenshot shows the Salesforce interface for an Opportunity named 'Edge SLA'. The 'Opportunity Detail' section includes fields for Opportunity Owner (Brian O'Conner), Amount (\$60,000.00), Expected Revenue (\$60,000.00), Opportunity Name (Edge SLA), Close Date (10/31/2016), Account Name (Edge Communications), Type (Existing Customer - Upgrade), Stage (Closed Won), Lead Source (Word of mouth), Probability (%) (100%), Order Number (847564), and Created By (Brian O'Conner, 2/17/2017 1:42 AM). The 'Use DaDaDocs' button is circled in green.

Select a document from the list and click **Edit Document**. To add a new document for editing, click **Upload Document**.



The screenshot shows the Salesforce Document Editor interface. The 'Upload Document' button is circled in red. The interface includes a navigation bar with tabs for Home, Opportunities, Campaigns, Leads, Accounts, Contacts, Contracts, Cases, Solutions, Products, and Assets. The 'Recent Items' list on the left includes 'Edge SLA', 'DM Campaign to Top Customers - Nov 12-23, 2001', 'Edge Communications', and 'Edge Emergency Generator'. The 'Choose Document' section displays a table with the following data:

Document Name	Type	Last Modified Date
Contract agreement_Filled	Attachment	5/24/2017 7:18 AM

Additional buttons visible include 'Edit Document', 'Send2Sign', and 'LinkToFill'.

## Mini Toolbar

The mini toolbar appears above any content you add to the document including text, checkmarks, pictures, etc.



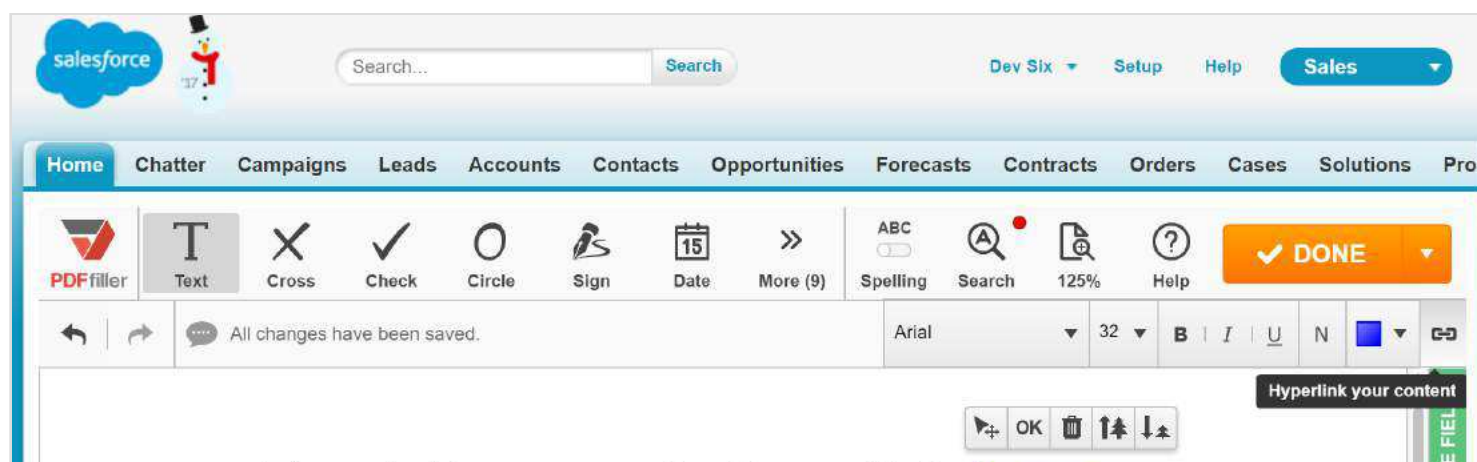
To change the position of the content, click the arrow icon and, while holding down the mouse button, drag the content where you need to place it. **OK** confirms your action and activates the **Text** tool. To resize the content, use the tree icons. To delete content, click the trash can icon.


## Hyperlink Tool

Any content that you add to a document including text, checkmarks, signatures, sticky notes etc. can be linked to any webpage.



Click the **Hyperlink button** and in the dialog window that will open next, type the URL of the web page and click **Save**.

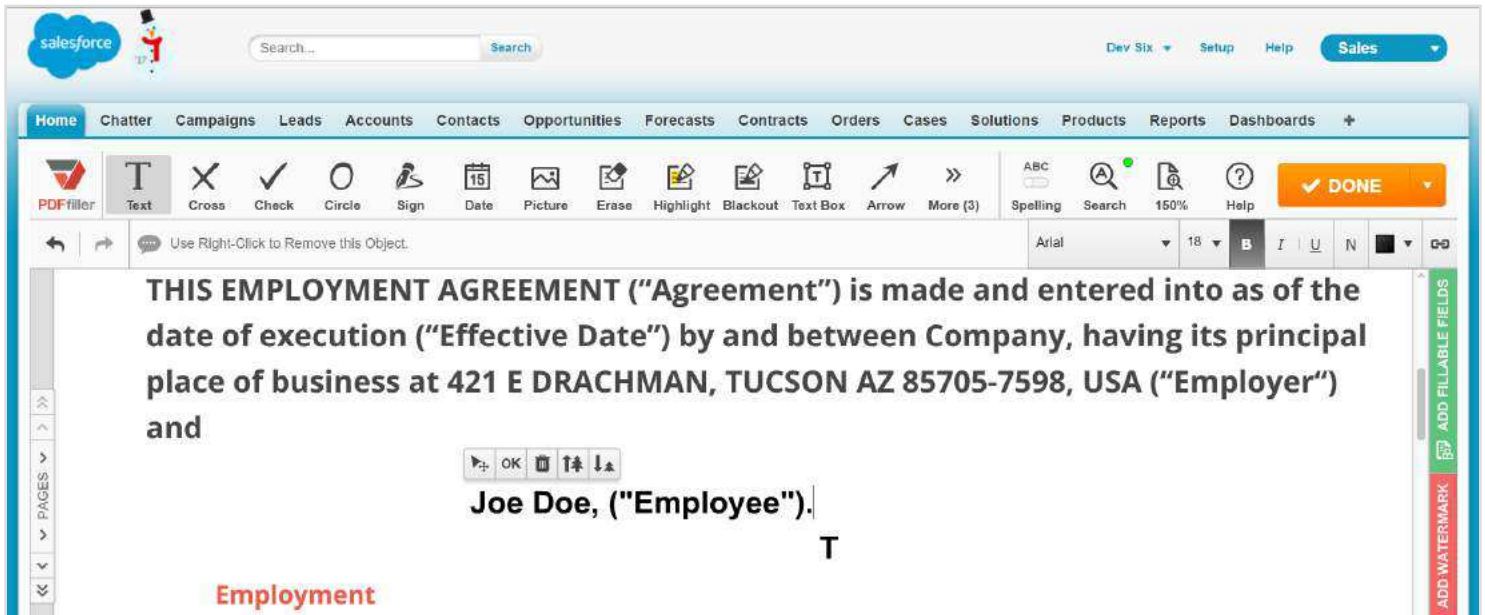


 **Hyperlink** ✕

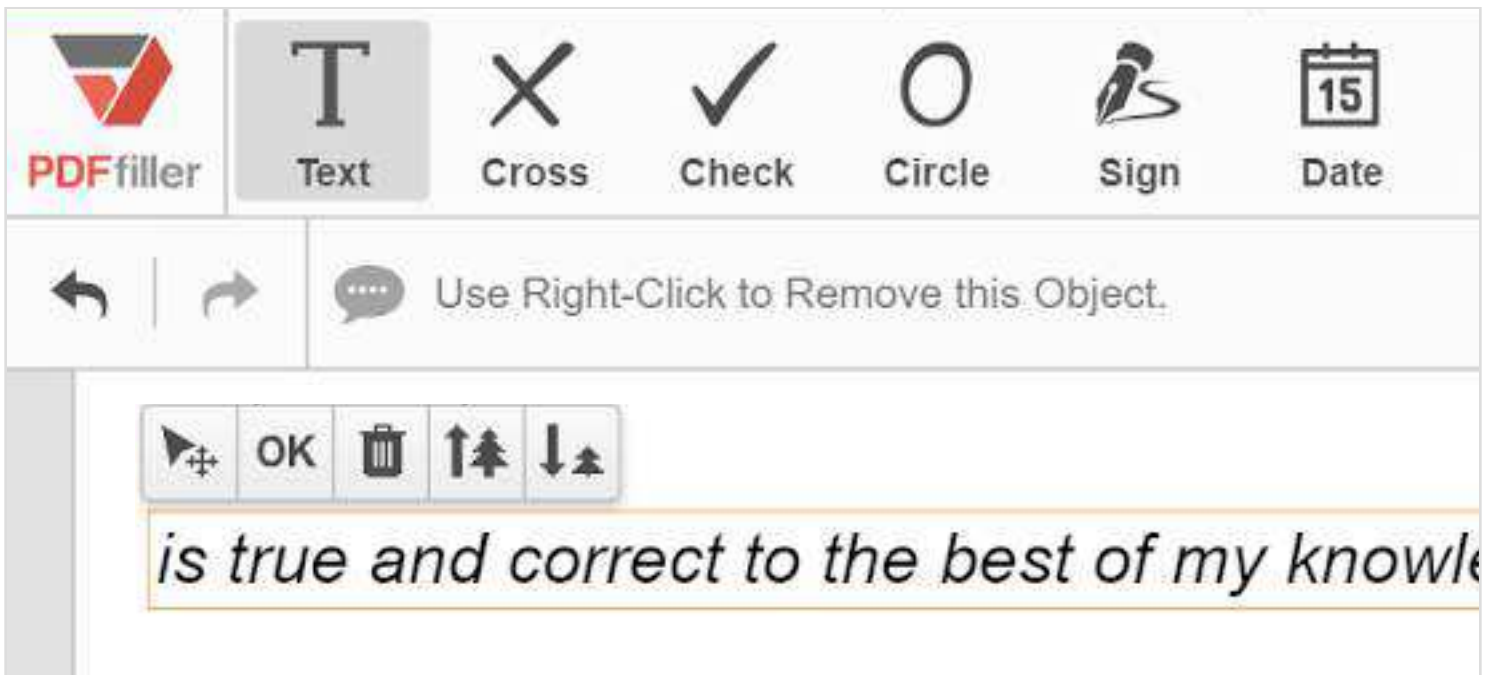
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## Text

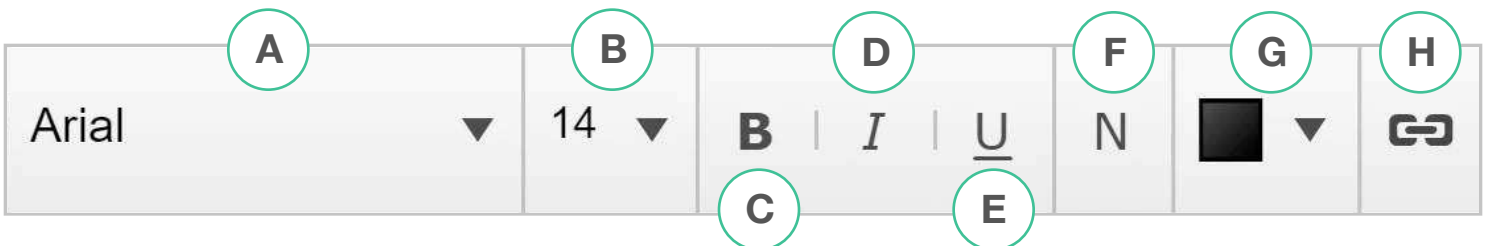
When you open a document, the Text tool is active by default. Click where you want to add text and start typing.



To adjust the position of the text, use the mini toolbar.



To format text, use this toolbar.



**A.** Change font

**B.** Change text size

**C.** Apply bold formatting

**D.** Italicize

**E.** Underline

**F.** Normal / change font

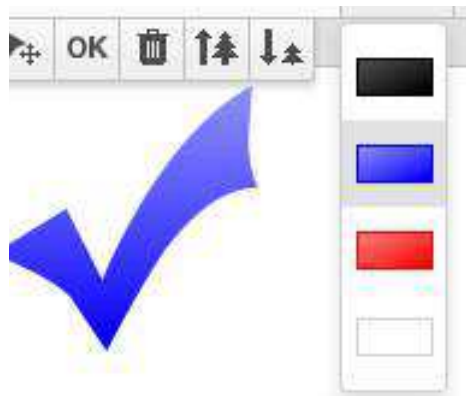
**G.** Color

**H.** Link text to a webpage

## Checkmarks

You can check boxes with a simple checkmark, X-mark or a circle. Select the respective icon in the main toolbar and click where you'd like to place it.

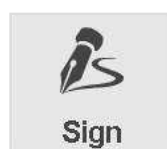
To change the color of the checkmark, click the color box and select the color you need.



You can also use the checkmarks as an annotation tool or as bullet points.

## Sign Documents

Create legally binding eSignatures faster than ever before.



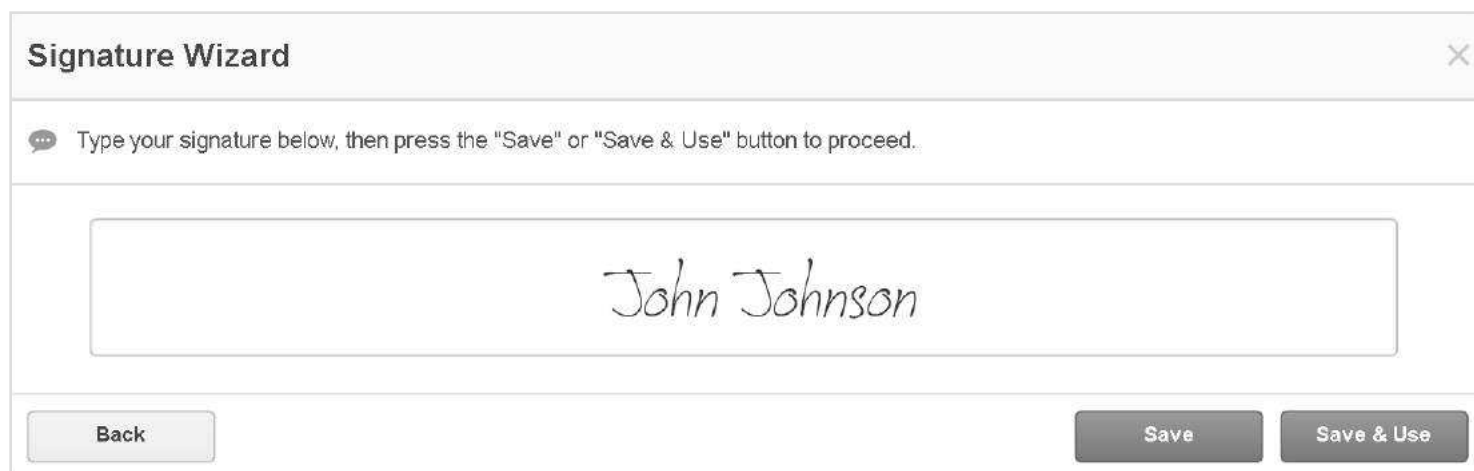
Click the **Sign** icon in the main toolbar to open the Signature Wizard that allows you to type, draw, upload, capture a signature with a webcam or sign the document on a mobile device.





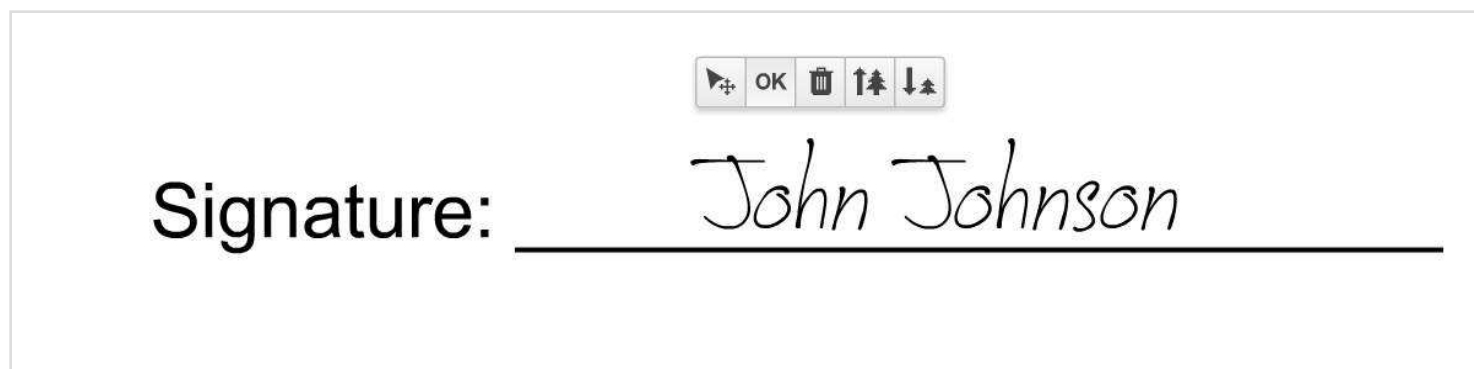
## Type a Signature

To type a signature, click the **T** icon and type your name. Click **Save & Use** to use the signature immediately or **Save** to use it later. In both cases, the signature will be saved in the Signature Wizard.



The screenshot shows a dialog box titled "Signature Wizard" with a close button (X) in the top right corner. Below the title bar, there is a message: "Type your signature below, then press the 'Save' or 'Save & Use' button to proceed." Below the message is a large text input field containing the handwritten signature "John Johnson". At the bottom of the dialog, there are three buttons: "Back" on the left, "Save" in the middle, and "Save & Use" on the right.

Click where you need to place the signature. Use the mini toolbar to resize the signature or change its position.




The screenshot shows a signature field with the text "Signature:" followed by a horizontal line. The handwritten signature "John Johnson" is placed on the line. Above the signature, there is a mini toolbar with five icons: a mouse cursor, "OK", a trash can, an up arrow, and a down arrow.


## Draw a Signature


To draw a signature, click the fountain pen icon and use your mouse or trackpad to draw your signature by clicking and dragging. You can also change the color and thickness of the signature.

### Signature Wizard ✕

Draw your signature below, make any desired changes, then click the "Save" or "Save & Use" button to continue.



← Undo | → Redo | 🗑️ Clear All | ■ ■ ■ | Line:  |  Smoothing



Back Save Save & Use

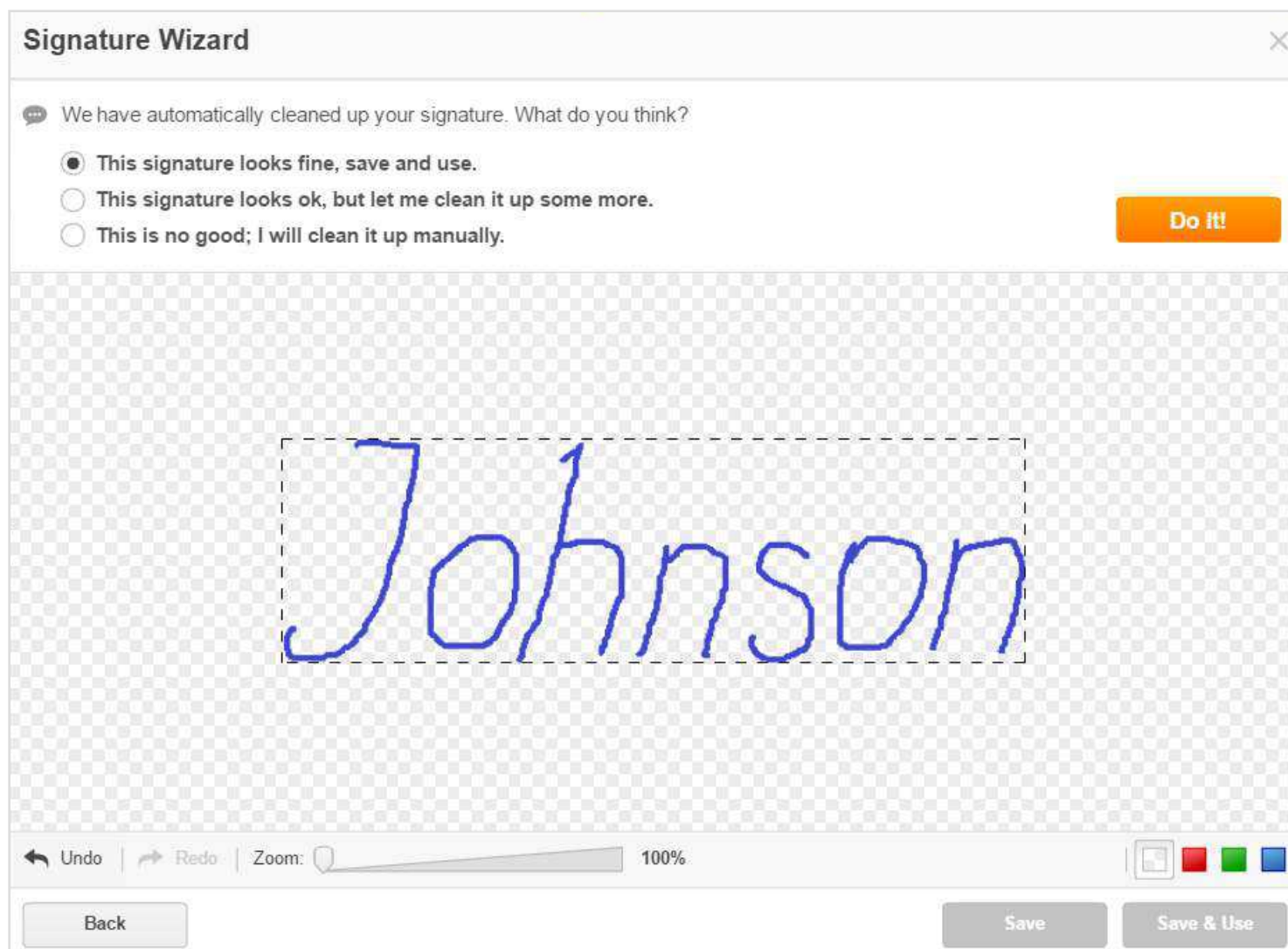
Save and place the signature exactly where you want it to appear.

Signature: 

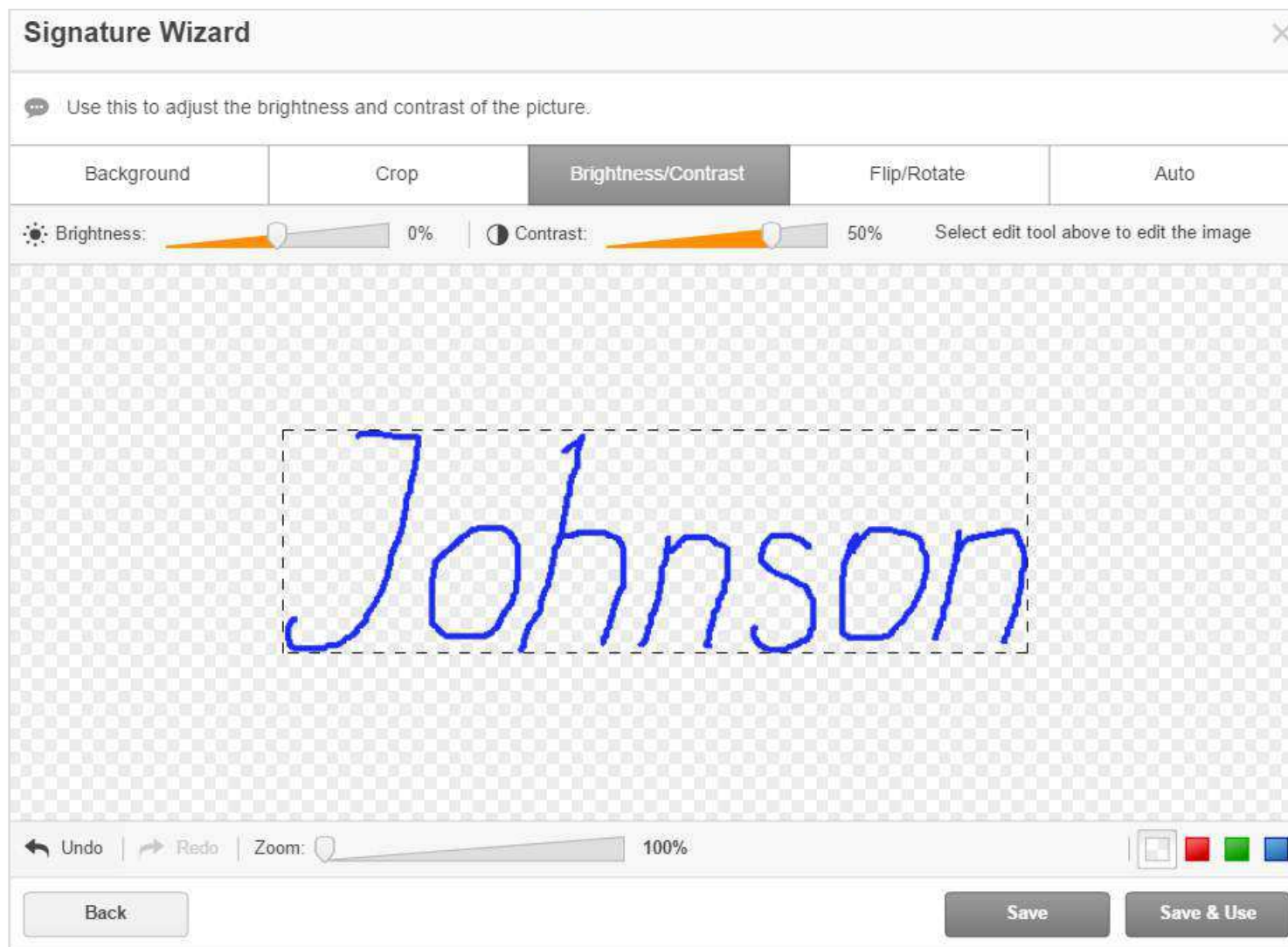


## Upload a Signature

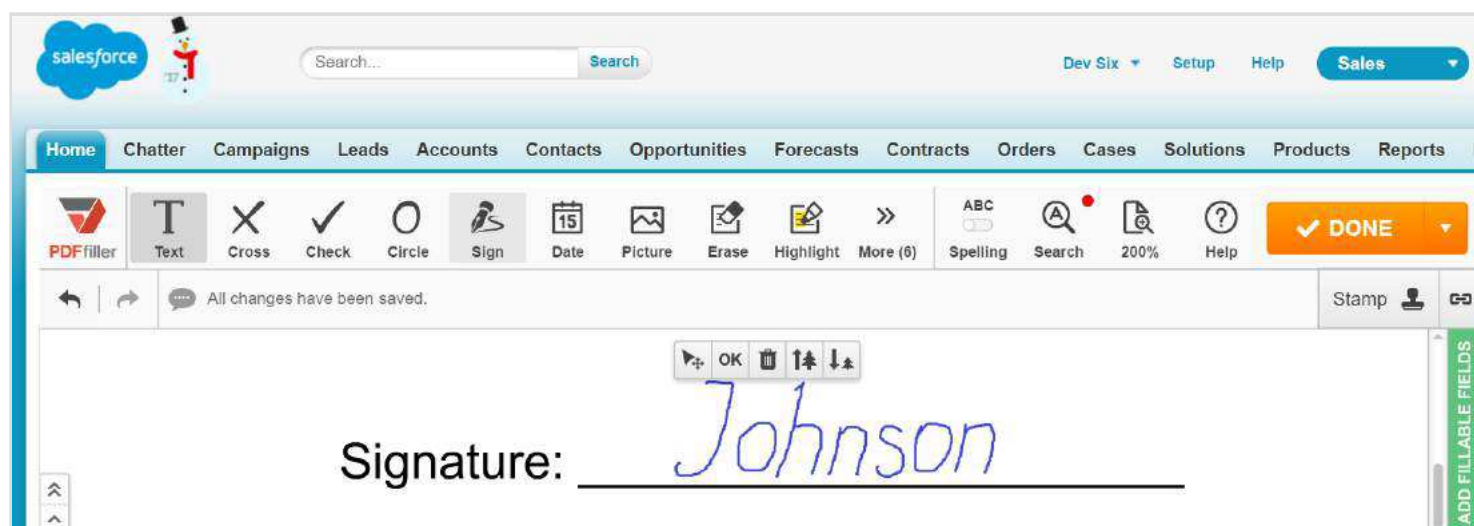
Click the **Upload** icon and select a photo of your signature stored on your local drive. The Signature Wizard processes the image, opens it and allows you to use the signature as it is or enhance it.



You can crop, rotate and flip the signature, change its background, adjust its brightness and contrast.



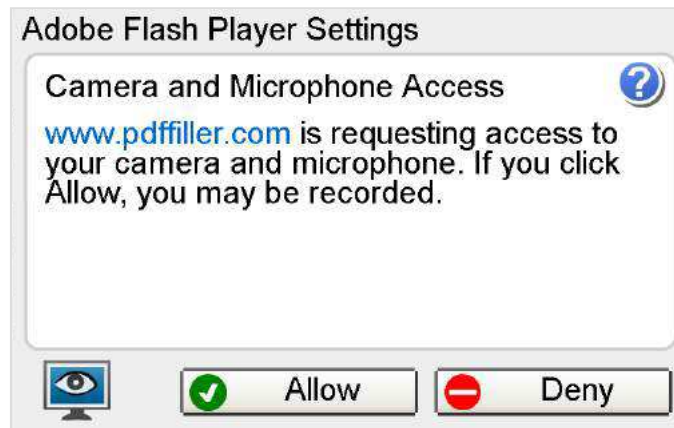
Click **Save & Use** and place your signature where it should be in the document.



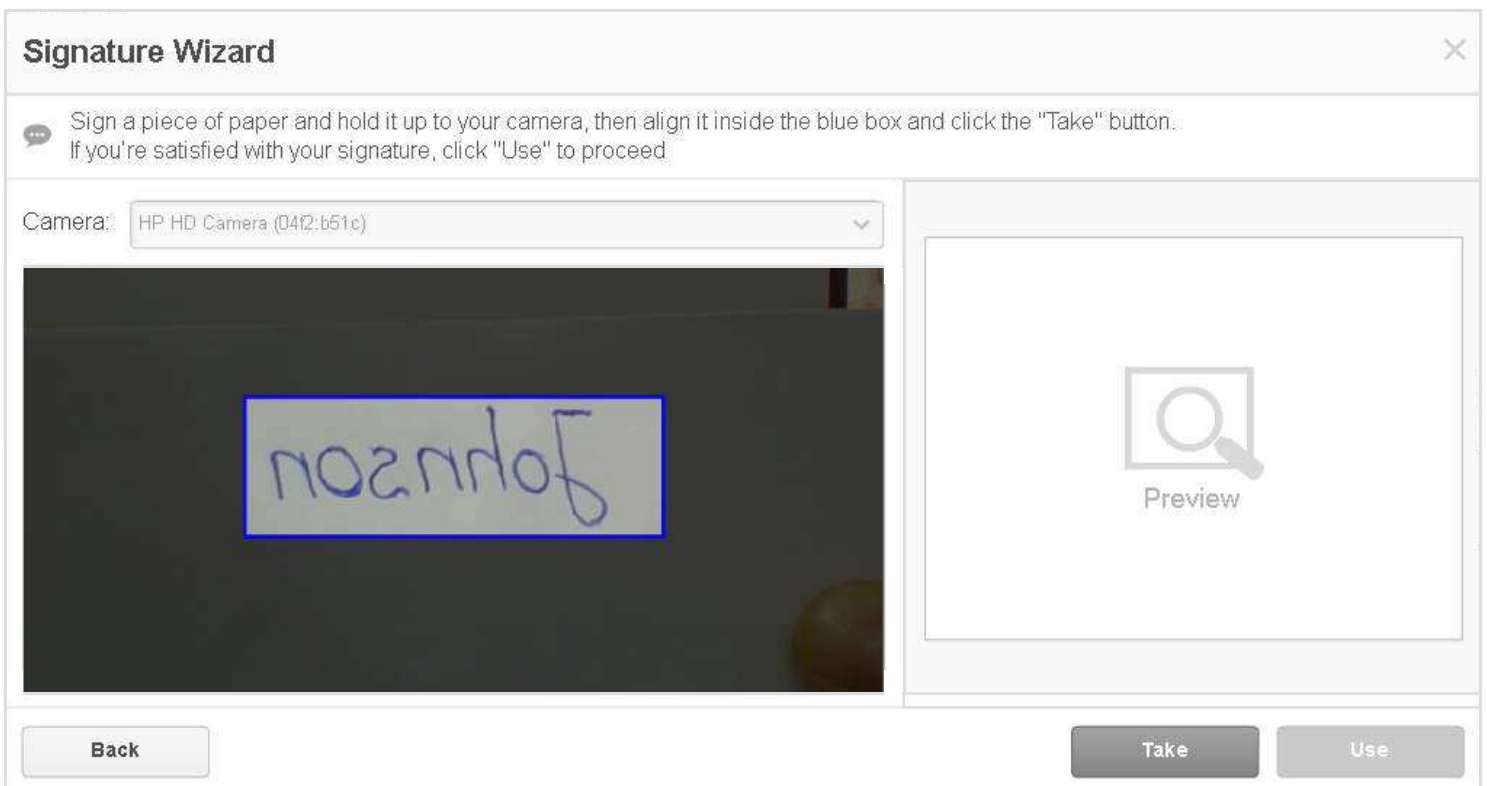
## Real Signature with a Photo

Make it easy to add a legally binding signature to a document by capturing a handwritten signature with a webcam.

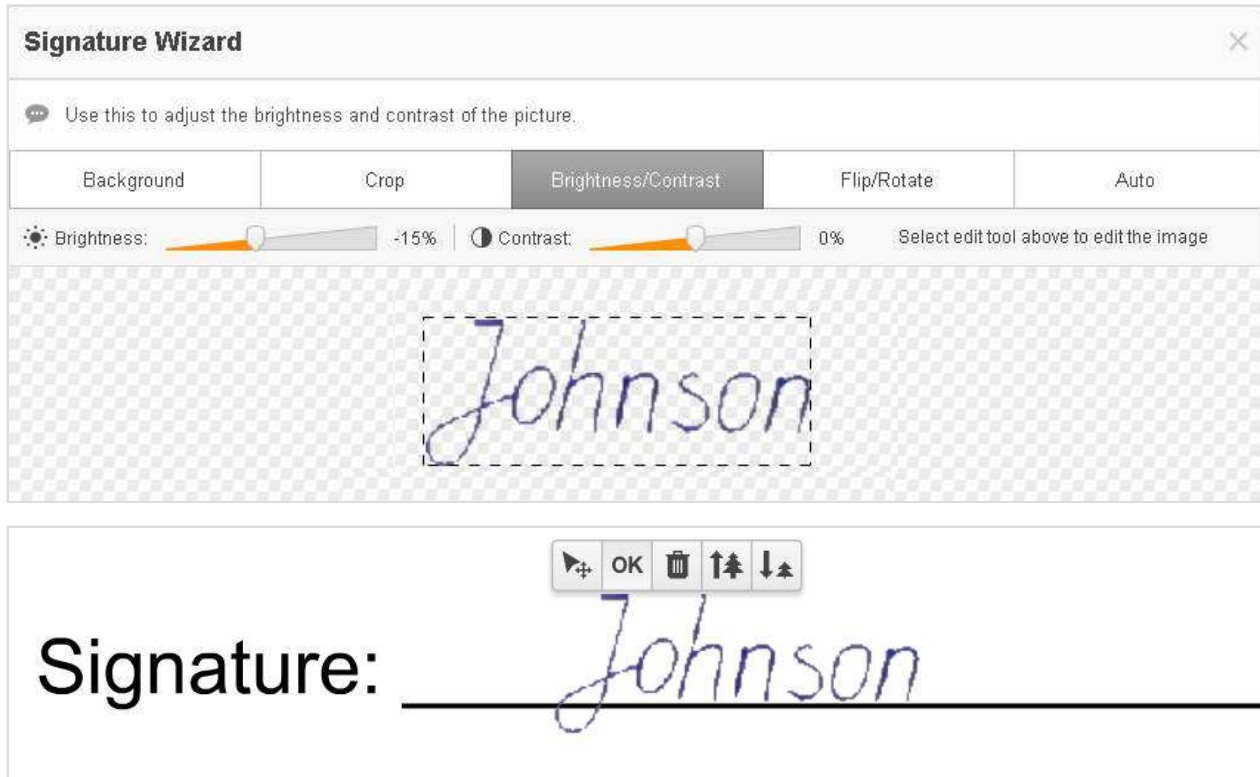
Click the webcam icon and allow DaDaDocs access to your camera.



Sign a piece of paper and hold it up to the camera so the signature fits inside the blue box then click **Take**.

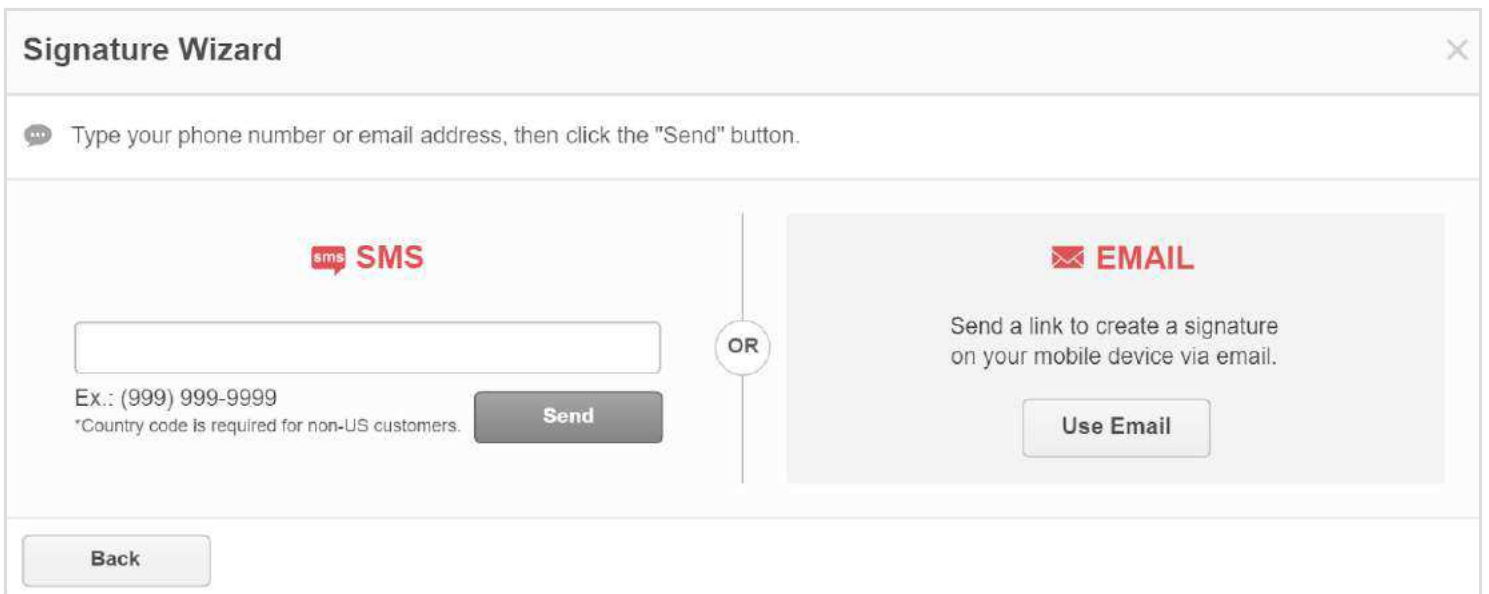


You can then choose to make adjustments to the scan or use the signature as-is.



## Add a Signature on Mobile

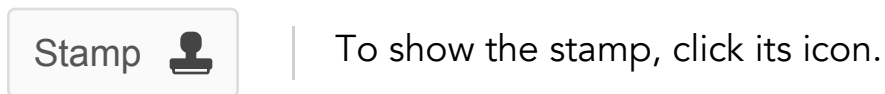
In the Signature Wizard, click the Mobile Device icon, enter your cell phone number, and click **send**.



You will receive a text message with a link to the document. Open the document and sign it. Instead of SMS, you can also choose to send the link via email.

## Verified by DaDaDocs Stamp

DaDaDocs verifies your signature with a stamp showing the date when you signed the document. To show the stamp, click its icon.

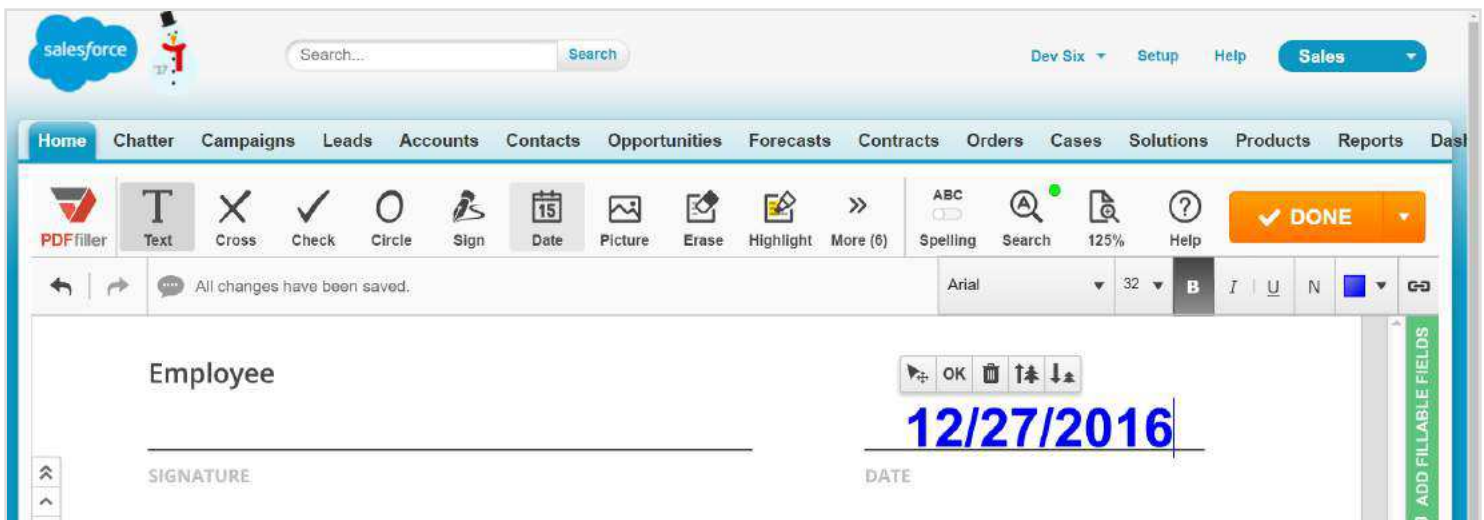


## Legal in 50 States

All signatures added in DaDaDocs are legally binding in the United States under the E-Sign Act (2000).

## Add the Date

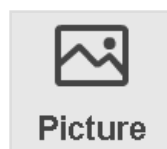
Click the **Date** icon in the main toolbar and click where you want to place the date. The current date appears by default. You can change it to any date you want.



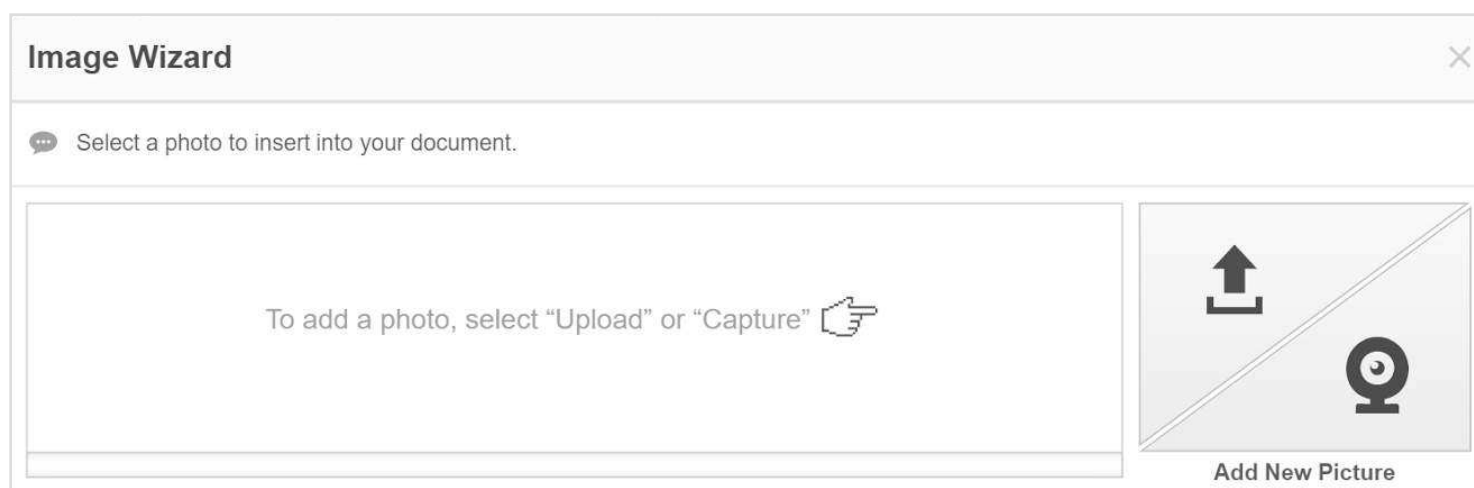
Format the date using the text formatting tools.

## Add an Image

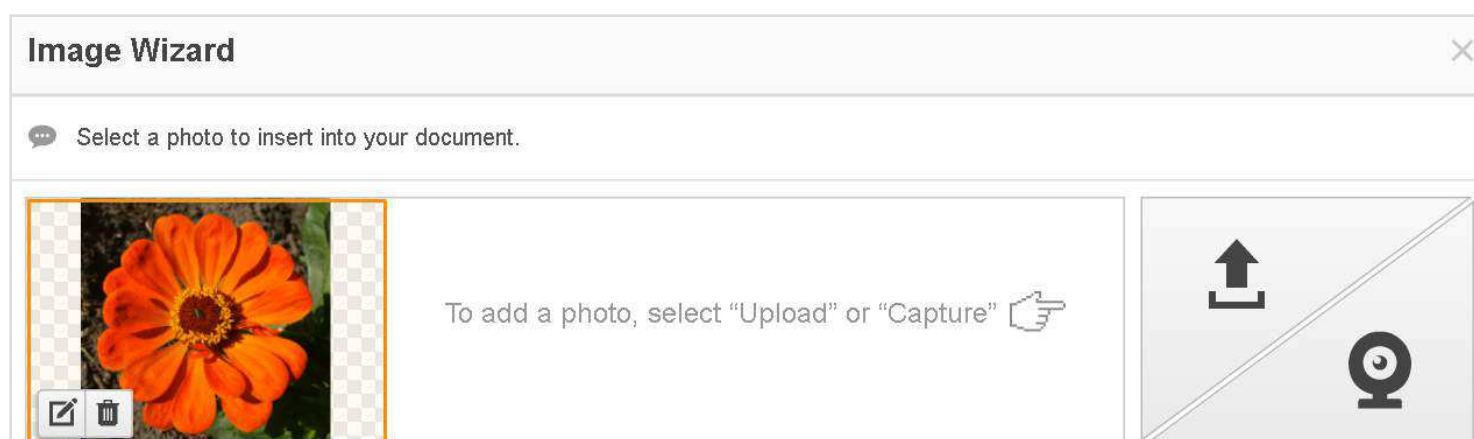
Enhance documents with images or pictures that have been uploaded or taken with a webcam.



Select the **Picture** icon in the main toolbar to open the **Image Wizard**. You can either upload a picture that you already have or take a new one using your webcam.

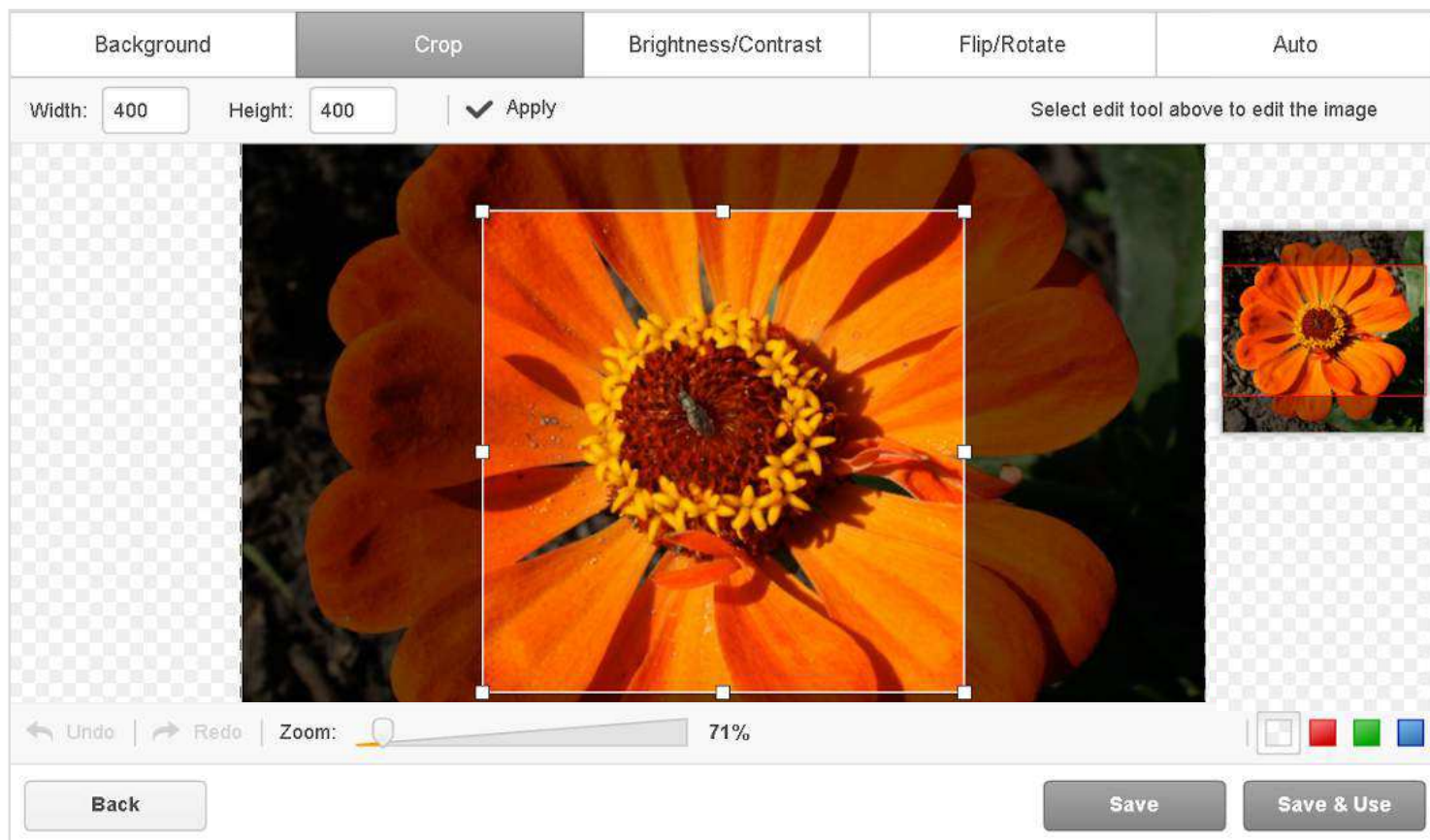


To upload a photo from your computer, click the **Upload** button.





Before inserting the image in the document, you can crop, rotate and flip it, change its background, and adjust its brightness and contrast.



To place the image on the document, just click on it in the **Image Wizard**. Move or resize it for a perfect fit using the mini toolbar.




You can also take a picture using your webcam and add it to the document. Select a photo size to the right of your camera image, click **Take**, then click **Use** to proceed.

### Image Wizard

Select a photo size to the right of your camera image.  
Click "Take" to take a photo, then click "Use" to proceed.

Camera: HP HD Camera (04f2:b51c)



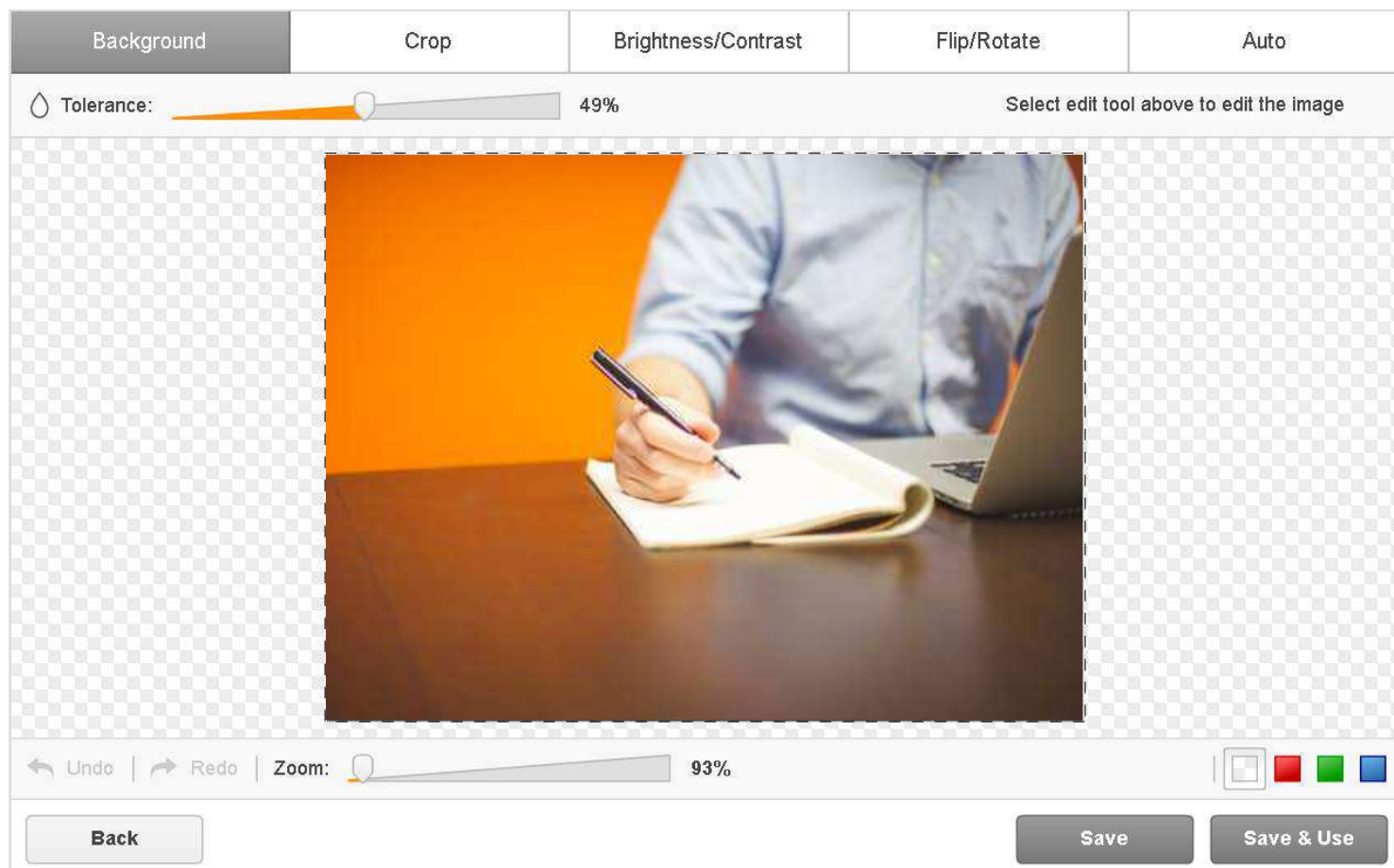
Units: Inches

Full Size (5.1 X 3.9) inches  
 US Passport (2 X 2) inches  
 Custom Size: 1.7 × 1.3

Preview

Back Take Use

The window that will open next allows you to crop the image, adjust its brightness and contrast, flip and rotate it, or otherwise enhance it. After you've finished editing your picture, click **Save & Use** to add it to your document immediately or select **Save** to use the picture later.



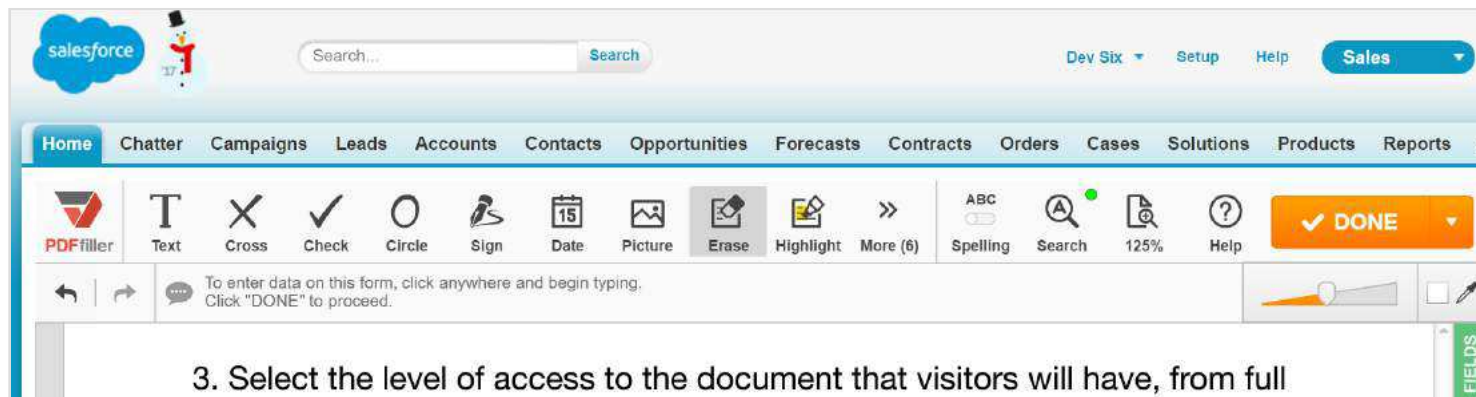
## Erase, Redact, and Draw

Easily customize documents to fit your needs with a variety of tools.

### Erase

Erase any content from a PDF document quickly and precisely.

Clicking the **Erase** button in the main toolbar will cause the eraser toolbar to appear under the editing tools.

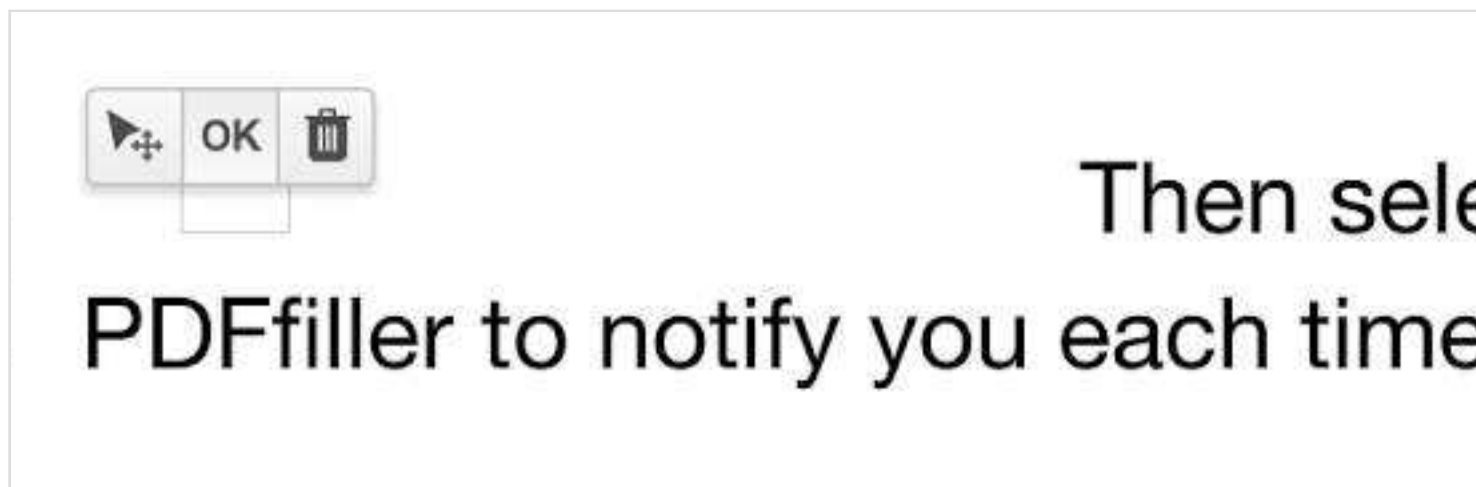


3. Select the level of access to the document that visitors will have, from full



Use the slider to change the thickness of the eraser.

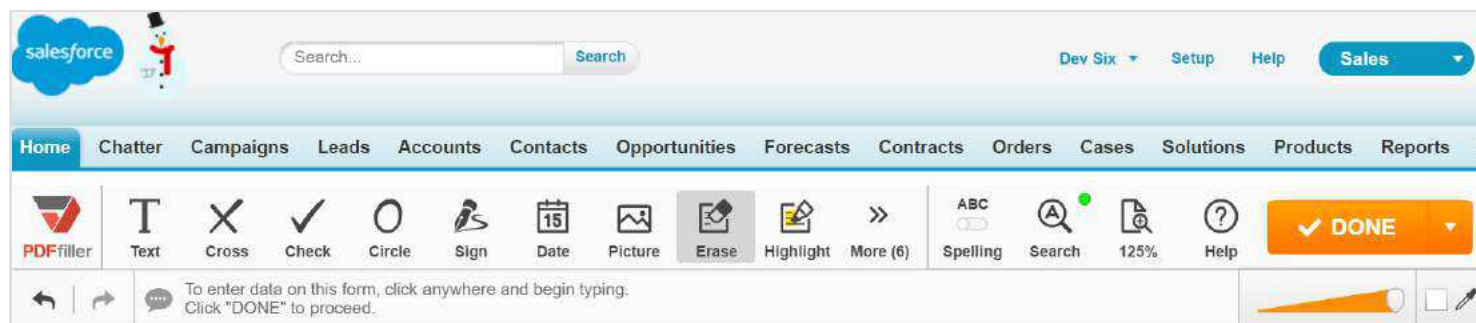
Navigate to the content you want to erase, press and hold down the mouse button, drag the eraser across the content, then release the button and click **OK**.



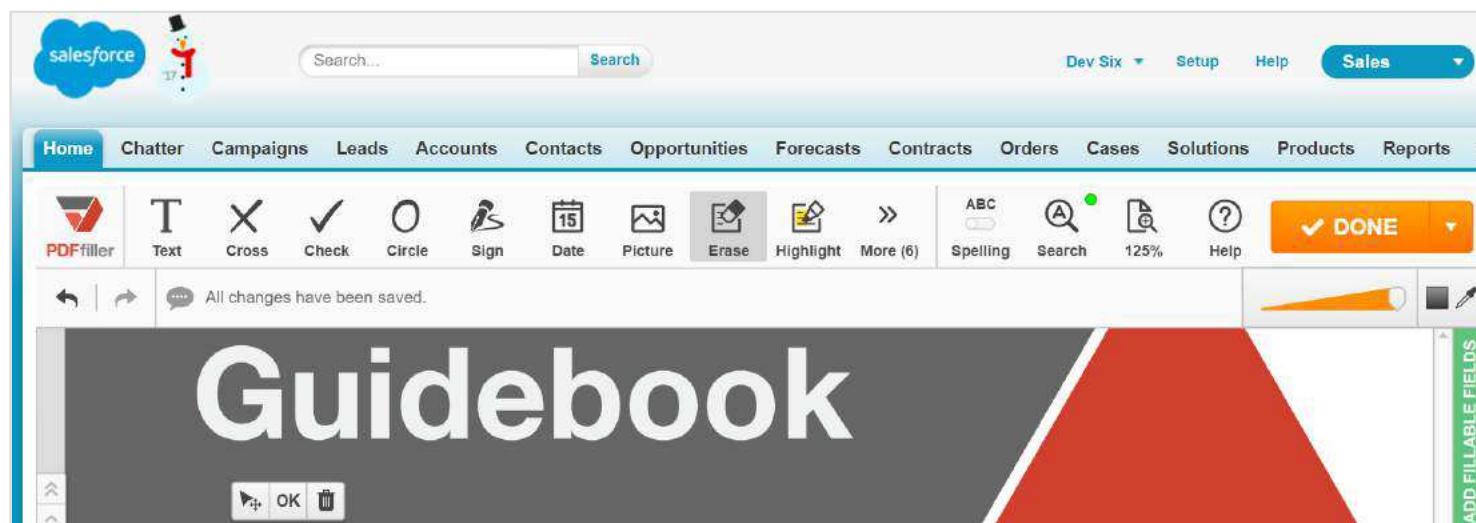
Then sele

PDFfiller to notify you each time

If the page color or background is not white, use the eyedropper tool to change the eraser's color.



Click the eyedropper icon then click once anywhere on the page or background. Navigate to the content you want to erase, click and drag the eraser across it and then click **OK**.



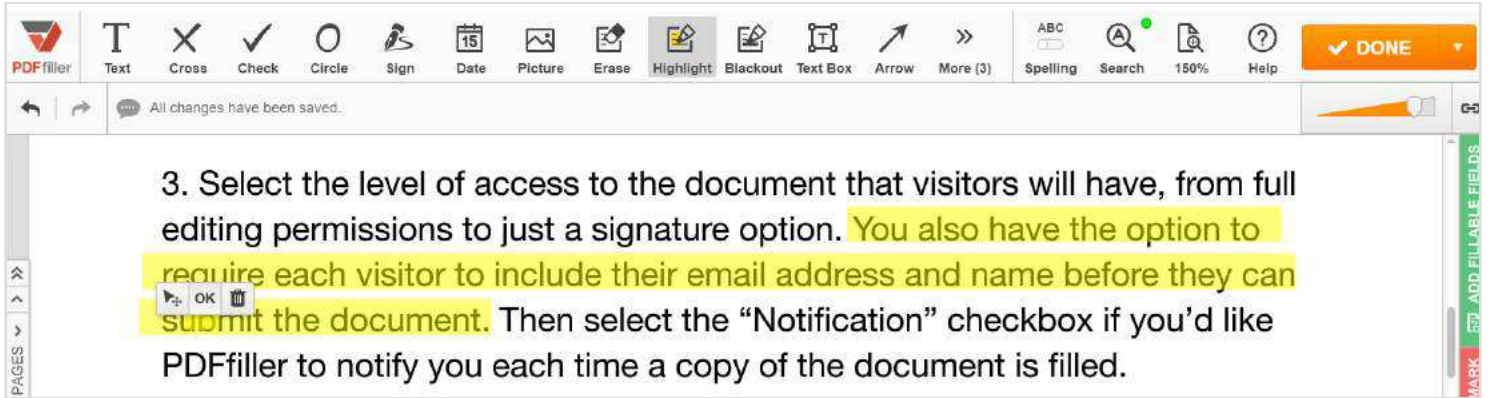
## Highlight

Highlight text in documents with the simple swipe of the cursor.

Click the **Highlight** button in the main toolbar, navigate to the content you want to highlight and click and drag the cursor to highlight specific areas of the document.



Use the slider to change the thickness of the highlighter before or after highlighting.



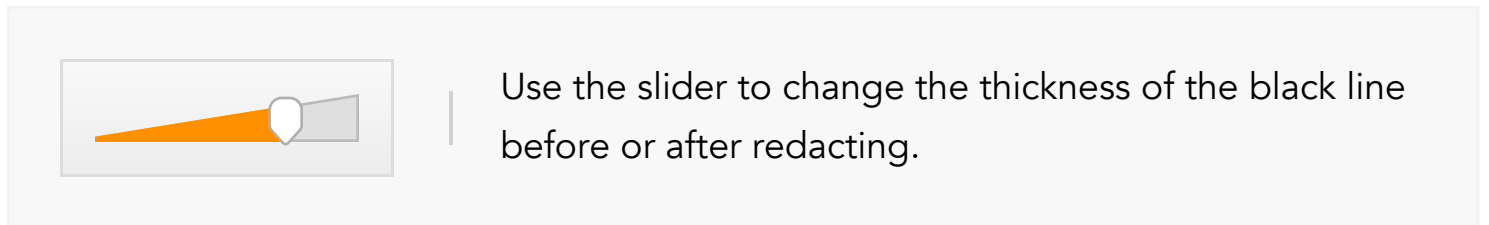
If you need to highlight specific words or phrases, use the **Search** tool and its highlighter.

To delete a highlight, select it and then click the trash can icon.

## Redact

Use the Blackout tool to redact sensitive information in PDF documents.

Click the **Blackout** button in the main toolbar, navigate to the content you want to redact, then click and hold down the mouse button while dragging your cursor across it.



If you need to redact specific words or phrases, use the **Search** tool.

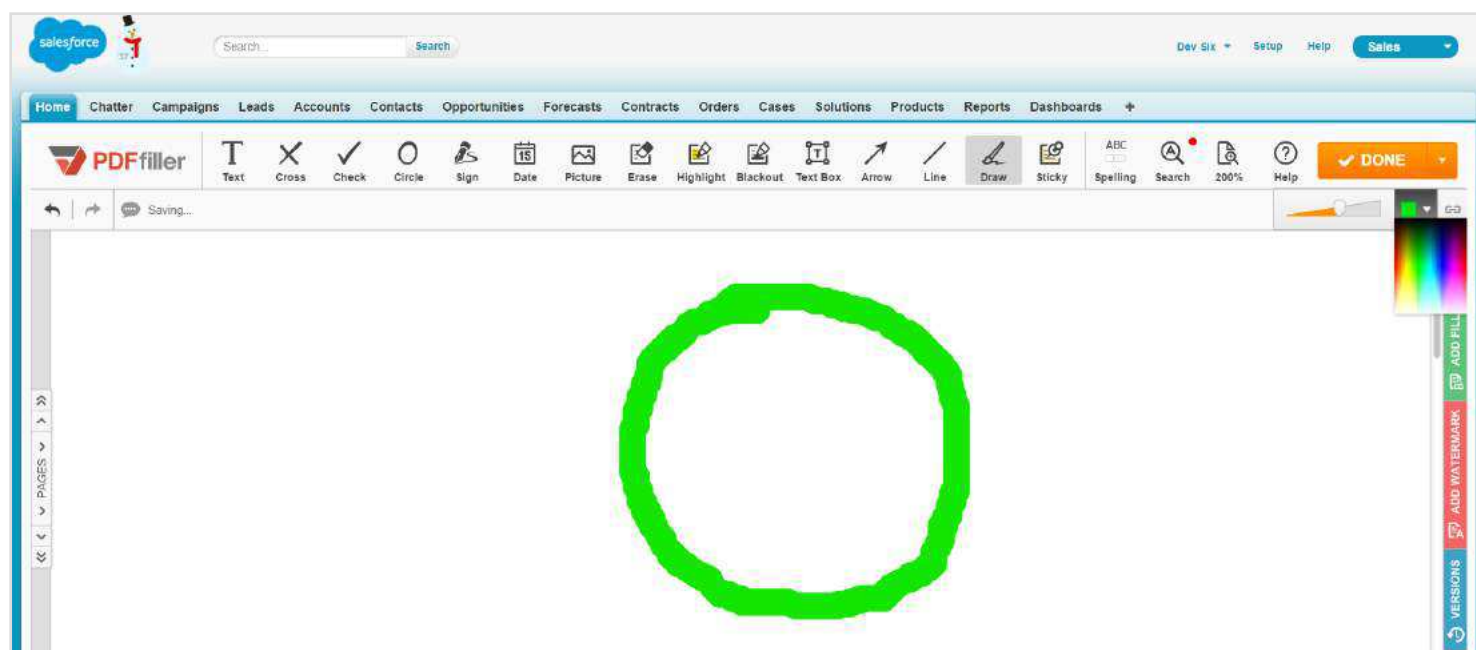
To delete a redaction, select it and click the trash can icon.

## Draw

Use powerful tools to draw any shapes on PDF documents.

Select the **Draw** tool in the main toolbar. The drawing toolbar will appear under the editing tools. Use the slider to set the thickness of the line. Click the color square and choose the color from the palette.

Click where you want to start and draw any shape by dragging. Release the mouse button to stop drawing and click **OK**.



You can change the thickness and color of the line after you've completed the drawing. Select it in the document and use the slider and the color palette.

## Add a Text Box

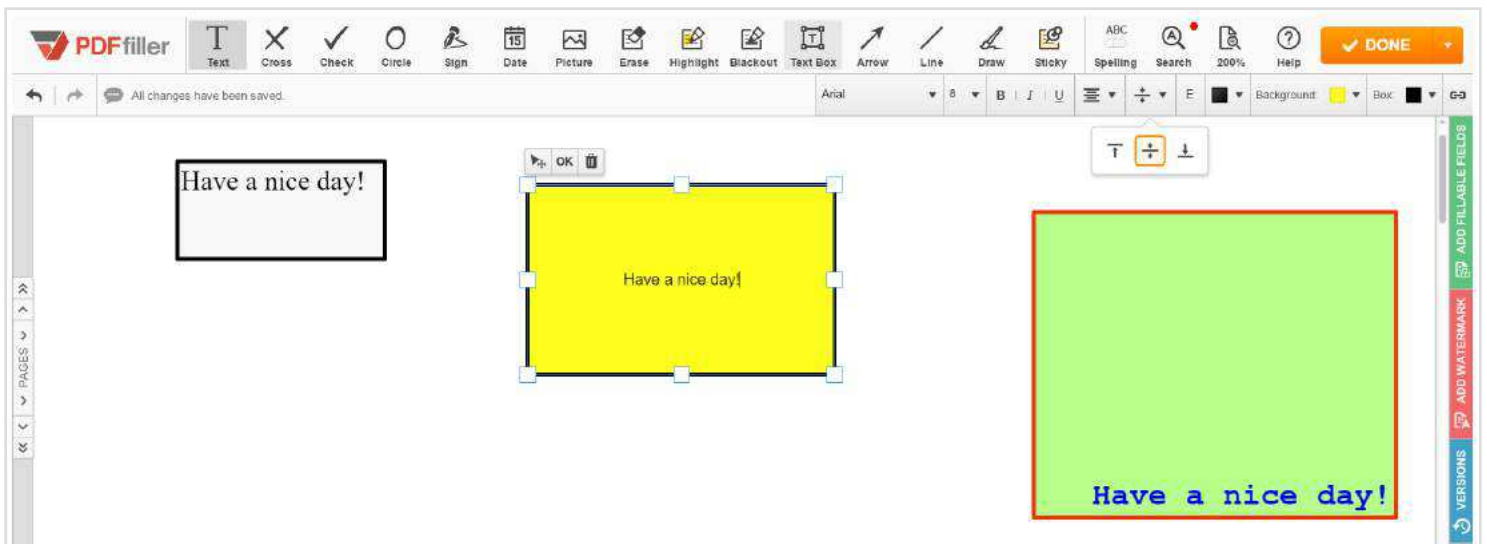


Select the Text Box icon in the main toolbar, click where you want to place the text box, and type your comment.

To resize the text box, drag its corners or edges. Change the vertical and horizontal alignment of the text using the vertical and horizontal alignment tools.



To change the color of the text, background or borders, click the respective color box and select the color you want.





## Sticky Notes

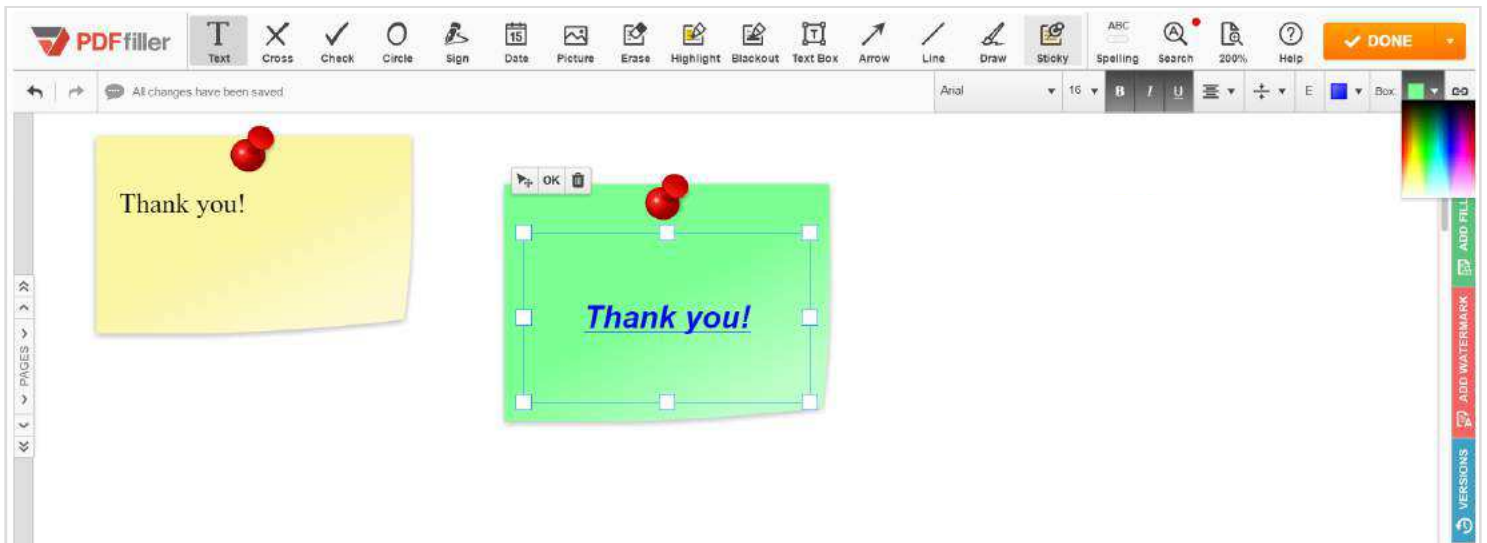
Leave comments on PDF documents with sticky notes.



Select the **Sticky** icon in the main toolbar, click where you want to place the text box, and type your comment.

To resize the sticky note, drag its corners or edges. To change the color of a sticky note, click the Box icon and select the color from the palette. Change the text alignment by using the vertical and horizontal alignment tools.

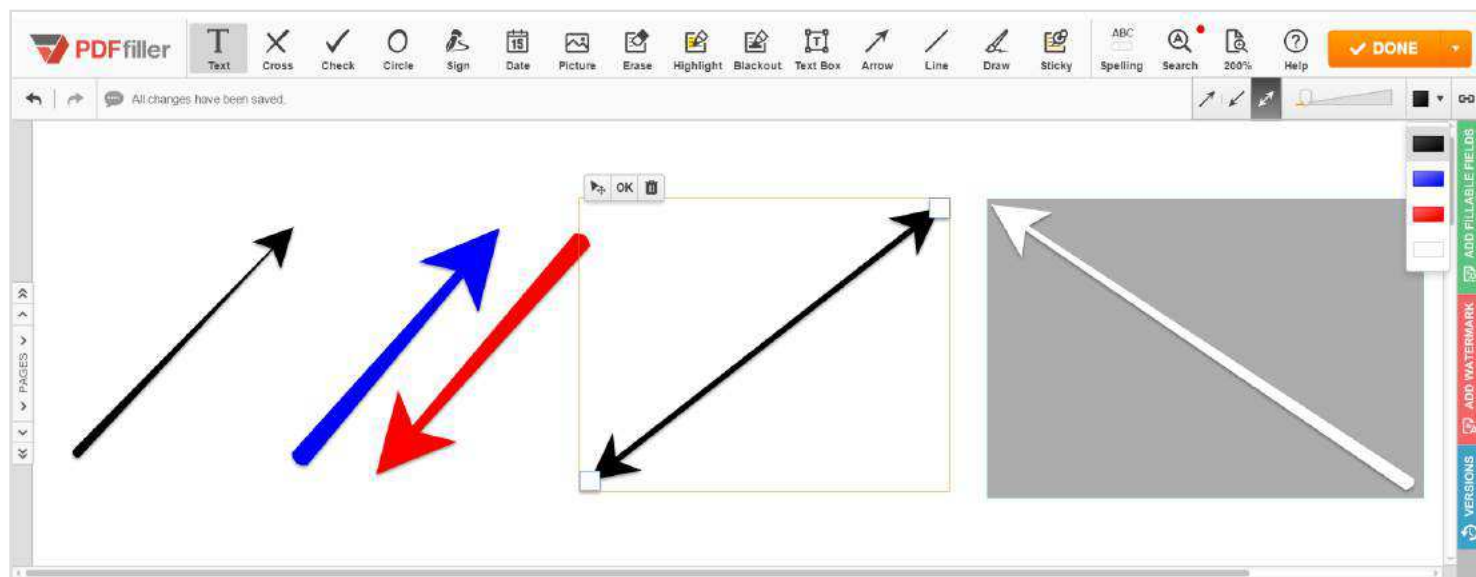
To resize the text box, drag its corners or edges. Change the vertical and horizontal alignment of the text using the vertical and horizontal alignment tools.



## Add Arrows

To add an arrow, click the **Arrow** icon in the main toolbar. The arrow toolbar will appear under the editing tools. Select the arrow you need, then click anywhere to create the start point and drag to where you want to create the end point, release the mouse button and click **OK**.

To change the arrow's color, click on the black square and choose the color from the dropdown. Use the slider to change the arrow's thickness.

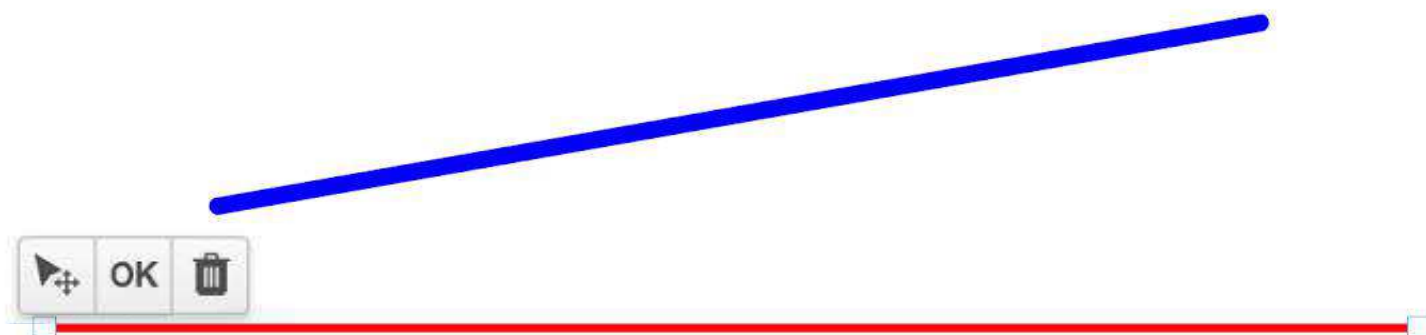


To reverse an arrow, select it and click the icon of the arrow with the opposite direction. To convert a simple arrow into a two-headed arrow, select the simple arrow and click the icon of the two-headed arrow. To change position of the start or end point, just drag it.

## Add Lines

To add a straight line to the document, click the Line icon in the main toolbar. The line toolbar will appear under the editing tools. Click where you want to create the start point and drag to where you want to create the end point, release the mouse button and click **OK**.

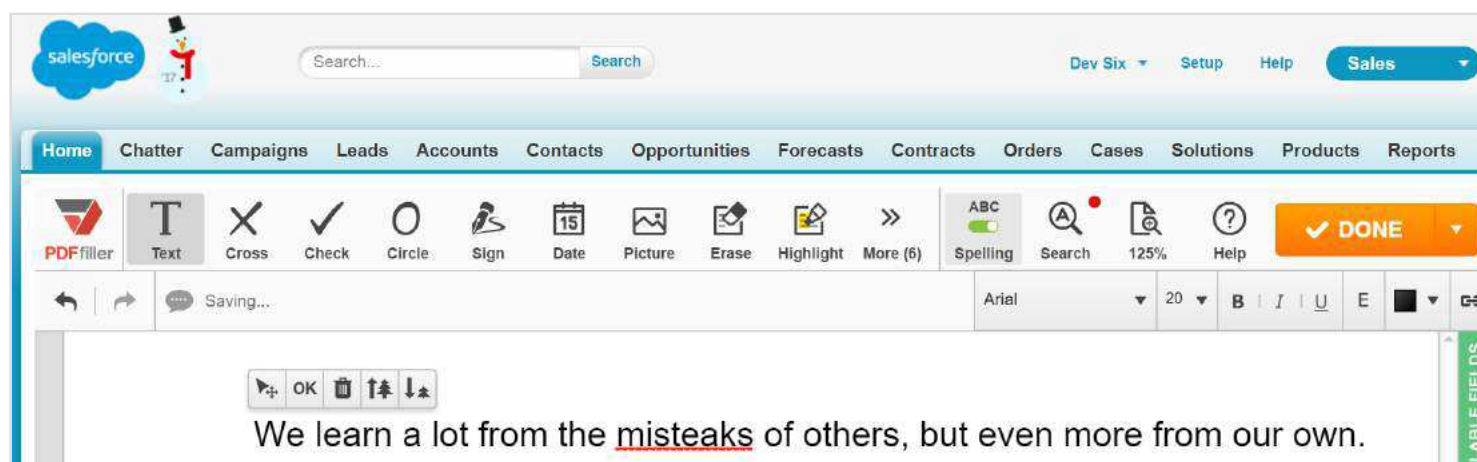
To change the line's color, click on the black square and choose the color you want. You can choose the color before adding it to the document. Use the slider before or after adding a line to change its thickness.



You can change the position of the line ends by dragging them.

## Spellchecker

The spellchecker checks only what you type and underlines misspelled, unknown or uncapitalized words.

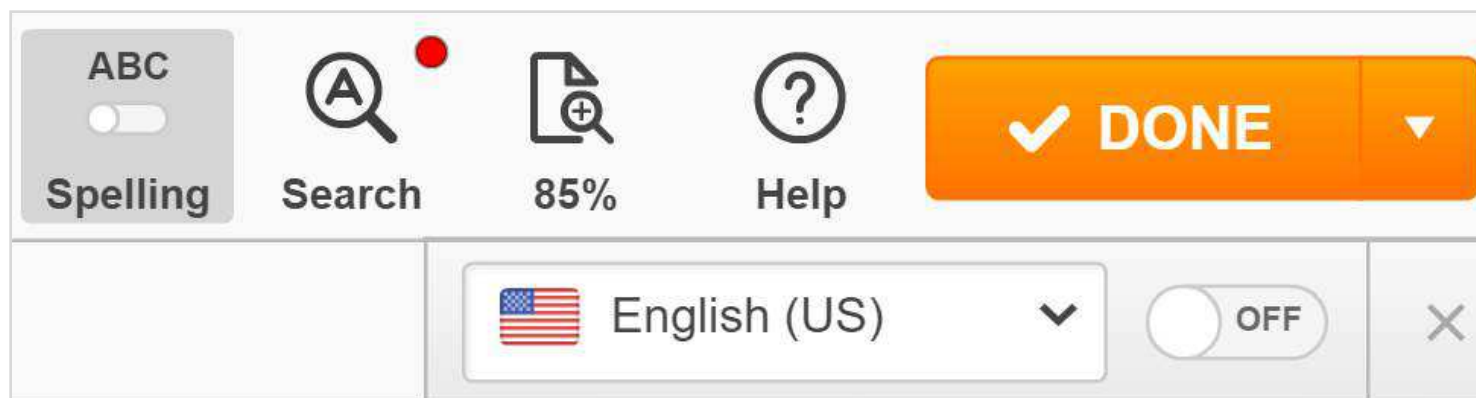


You can activate the spellchecker at any time before or after you start typing.

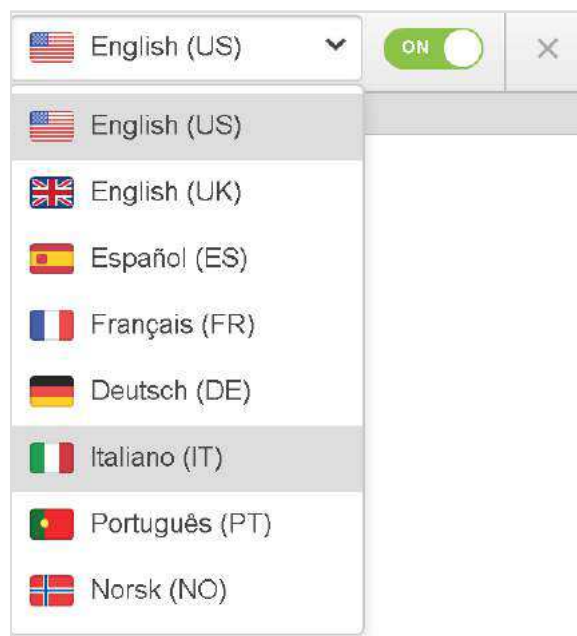


Click the Spelling icon in the main toolbar.

The spellchecker panel will appear below the main toolbar, just click on the toggle.



Apart from English, you can check Spanish, Italian, German, Portuguese, French and Norwegian texts. Select the language you need from the dropdown list.



To correct a word, right-click it and choose its replacement from the dropdown list.



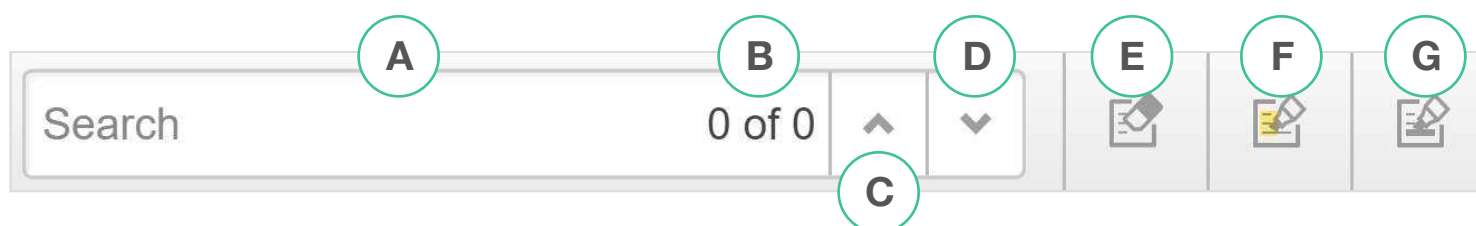
The spellchecker underlines the words that it does not recognize. If the word is spelled correctly, you can add it to your dictionary. The spellchecker will recognize it next time you type it.

## Search Text in PDF

Find specific words or phrases in PDF documents.

### Search

Use the **Search** tool to find a word or a phrase in the currently open document.



A. Search field

B. Counter

C. Previous

D. Next

E. Erase

F. Highlight

G. Blackout



To activate the Search tool, click the **Search** icon in the main toolbar or press **CTRL+F** on your keyboard.



If a PDF document is not searchable, the dot on the Search icon will be red.

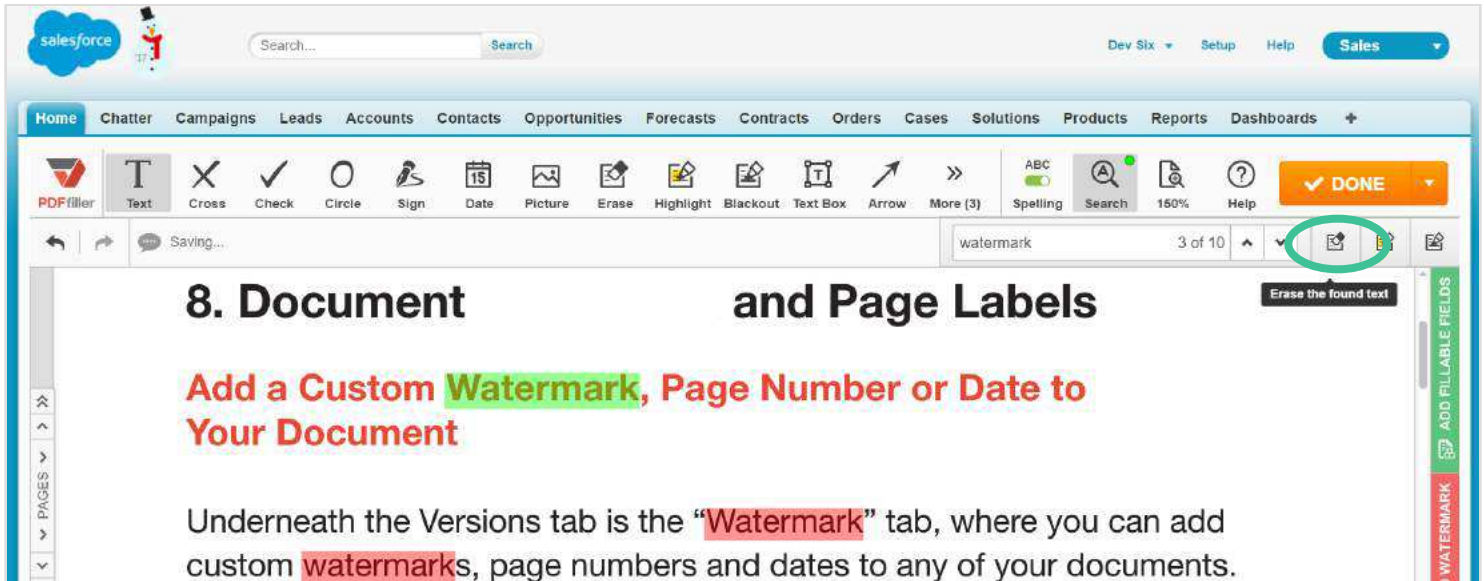
Type the text you want to find in the search field. The counter will show you the number of the current search term and the total number of search terms found in the document. The current search term is highlighted in green, the others are highlighted in red.

The screenshot shows the PDFill software interface. At the top, there is a search bar with the text 'watermark' entered. Below the search bar, the document content is displayed. The first heading is '8. Document Watermark and Page Labels', where 'Watermark' is highlighted in green. Below this heading, the text 'Add a Custom Watermark, Page Number or Date to Your Document' is highlighted in red. The search bar at the top right shows '2 of 10' results. The interface also includes various toolbars and navigation options.

To jump to the next instance of the search term, click **Next**; to return to the previous instance, click **Previous**.

## Search and Erase

To delete the current search term, click **Erase**. The next search term will automatically become current.



The screenshot shows the PDFfiller interface with the search term "watermark" entered. The search results are displayed on the page, with the word "watermark" highlighted in red. The "Erase the found text" button is circled in green. The interface includes a top navigation bar with "Home", "Chatter", "Campaigns", "Leads", "Accounts", "Contacts", "Opportunities", "Forecasts", "Contracts", "Orders", "Cases", "Solutions", "Products", "Reports", and "Dashboards". The toolbar contains various editing tools like Text, Cross, Check, Circle, Sign, Date, Picture, Erase, Highlight, Blackout, Text Box, Arrow, Spelling, Search, and Help. The "DONE" button is visible in the top right corner.

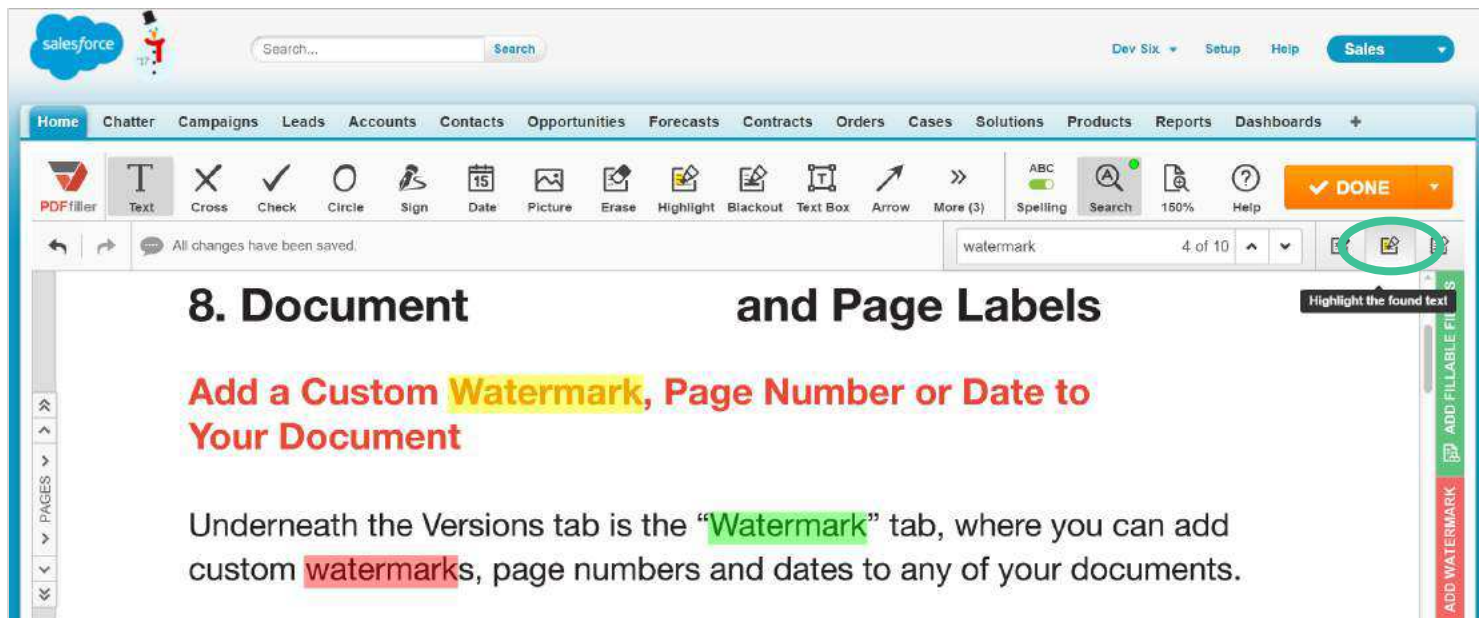
## 8. Document and Page Labels

Add a Custom **Watermark**, Page Number or Date to Your Document

Underneath the Versions tab is the "Watermark" tab, where you can add custom **watermarks**, page numbers and dates to any of your documents.

## Search and Highlight

To highlight the current search term in yellow, click **Highlight**.



The screenshot shows the PDFfiller interface with the search term "watermark" entered. The search results are displayed on the page, with the word "watermark" highlighted in yellow. The "Highlight the found text" button is circled in green. The interface includes a top navigation bar with "Home", "Chatter", "Campaigns", "Leads", "Accounts", "Contacts", "Opportunities", "Forecasts", "Contracts", "Orders", "Cases", "Solutions", "Products", "Reports", and "Dashboards". The toolbar contains various editing tools like Text, Cross, Check, Circle, Sign, Date, Picture, Erase, Highlight, Blackout, Text Box, Arrow, Spelling, Search, and Help. The "DONE" button is visible in the top right corner.

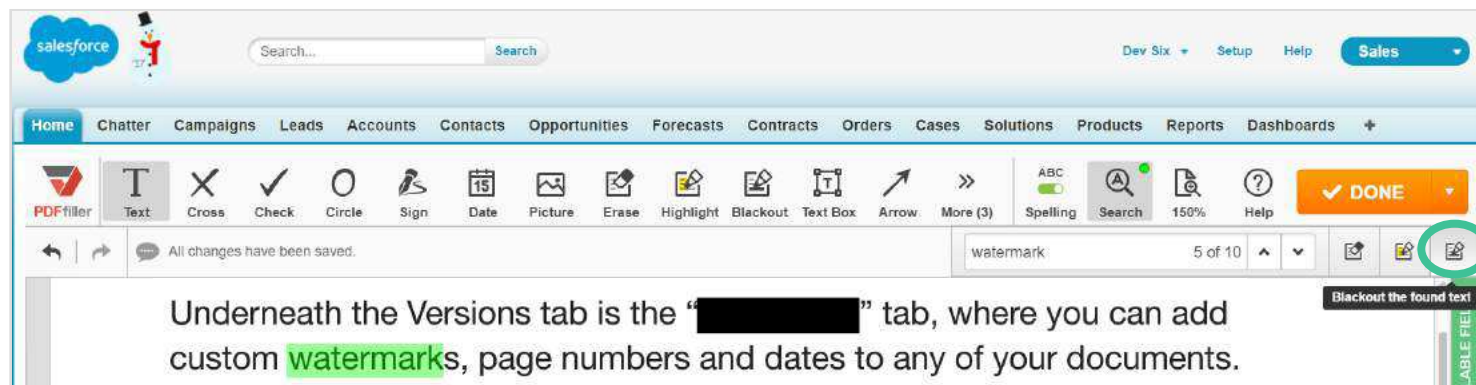
## 8. Document and Page Labels

Add a Custom **Watermark**, Page Number or Date to Your Document

Underneath the Versions tab is the "Watermark" tab, where you can add custom **watermarks**, page numbers and dates to any of your documents.

## Search and Redact

To redact the search term, click **Blackout**.



## Fillable Fields

Transform any document or form into a fillable form with smart digital fields using DaDaDocs' drag and drop wizard.

## Drag and Drop Fields

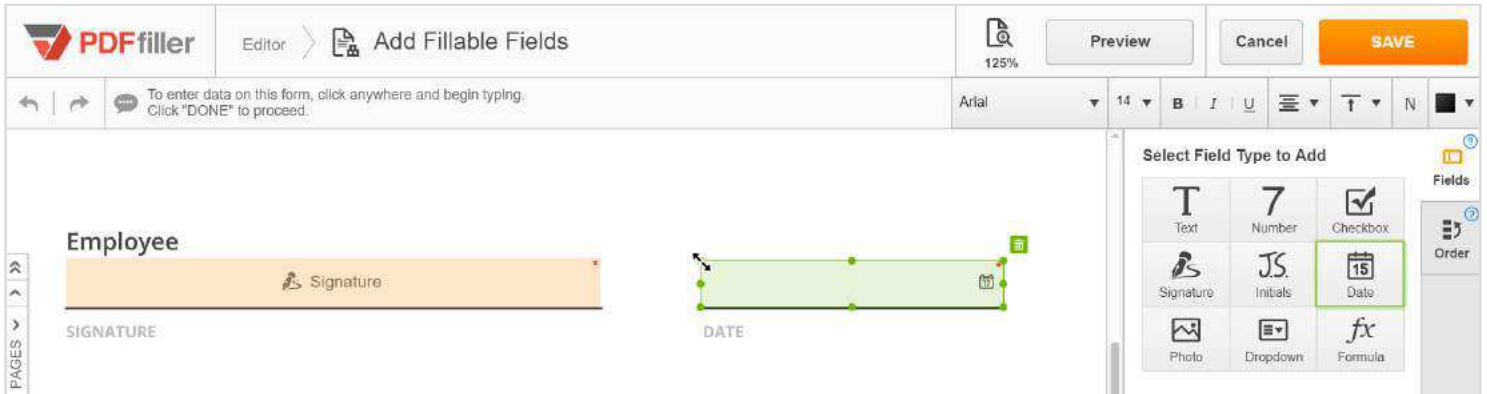
The technique for adding fields is the same for all field types.

### ADD FILLABLE FIELDS

While editing a document, open the **Add Fillable Fields** tab on the right.



Select the field you need, then drag and drop it where it should be in the document. Resize the field by dragging its corners or edges.



To delete a fillable field, click on the trash can icon above it.

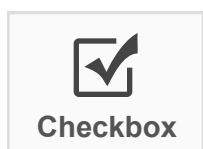
## Required Fields

You can mark any field as **Required**. Check the box and a red asterisk will appear in the top right corner of the field.

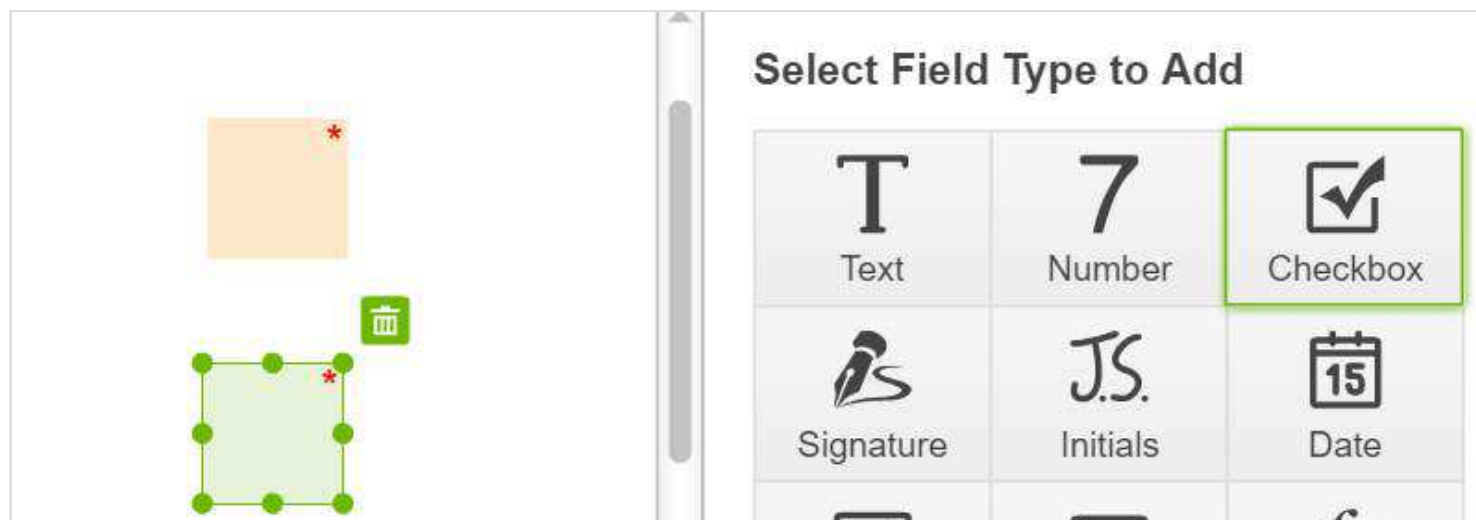


It is impossible to submit a form if a required field is empty.

## Checkboxes



To add a checkbox, select the **Checkbox** icon in the right pane and click where you want to place it.



When you resize a checkbox, the next one will be of the same size so you will not have to resize each checkbox.

To customize a checkbox, select it, then click **Advanced** to expand options.

**Type of Checkbox.** You can format the checkbox to be filled with a simple checkmark, "X", or circle.

**Default.** Select whether the default setting for a checkbox is checked or unchecked.

**Note.** Enter instructions or tips for filling the field. Users will see the note when they hover their mouse over the field.

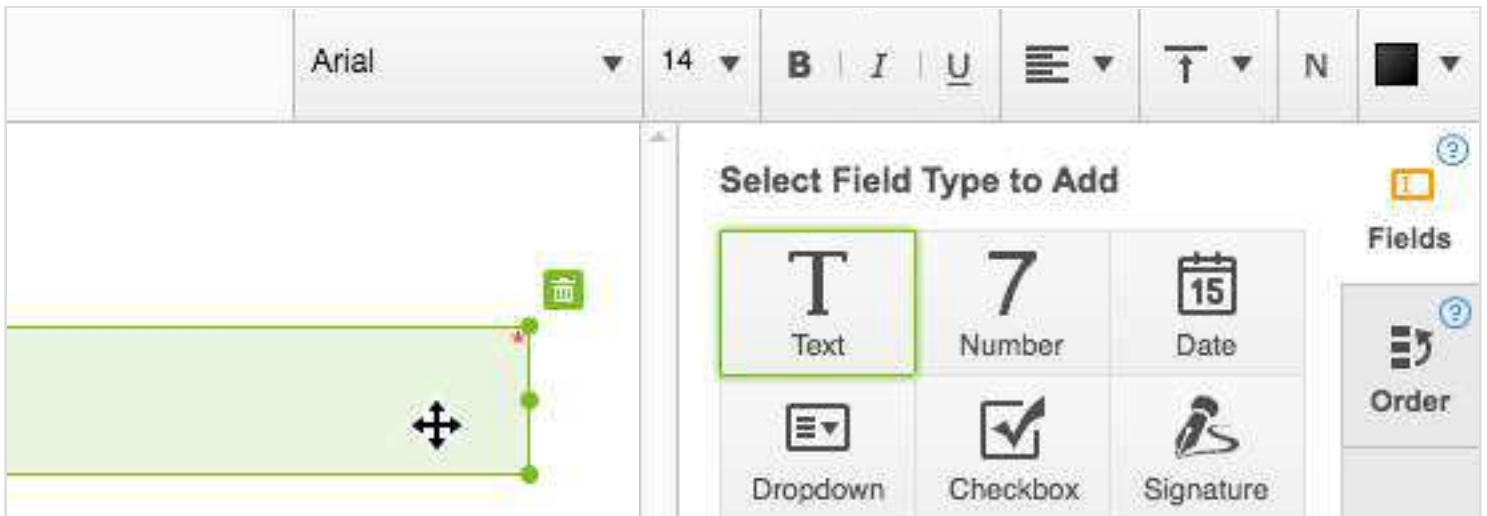
**Database Field Name.** Create a name for the field that will appear when you export filled data to a spreadsheet or when you use a DaDaDocs API.

**Group Name.** Group checkboxes together by entering the same group name for each box. Only one checkbox within a group can be checked at any time.

## Text Field



To add a text field, click the **Text** icon, then click where you want to place the field.



Use the text formatting tools to preset the field's text format including the font, size, color and alignment of text. It will be impossible to change the text format while filling the field.

To customize the text field further, click **Advanced** to expand options.

**Default Text** is the text that will appear in the field when others fill the form. If you lock the field, nobody will be able to replace the default text.

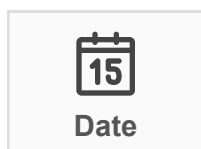
**Note.** Here you can enter any instructions or tips for filling the field. Users will see the note when they hover their mouse over the field.

**Max Characters.** Set the maximum number of characters allowed in the field. The "auto" setting will limit that number to what can physically fit into the field.

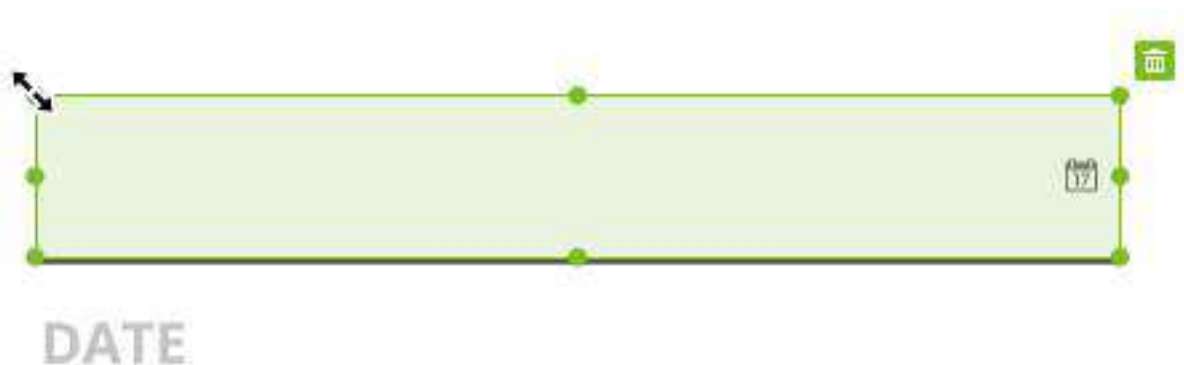
**Max Lines.** Set the maximum number of lines allowed in the field.

**Database Field Name.** Create a name for the field that will appear when you export filled data to a spreadsheet or when you use a DaDaDocs API.

## Date Field



To add a date field, click the **Date** icon, then click where you want to place the field.



To customize a date field, click **Advanced** to expand options.

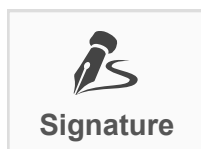
**Format.** Select one of many date formats.

**Default.** Choose the date that the field will display before the user changes it.

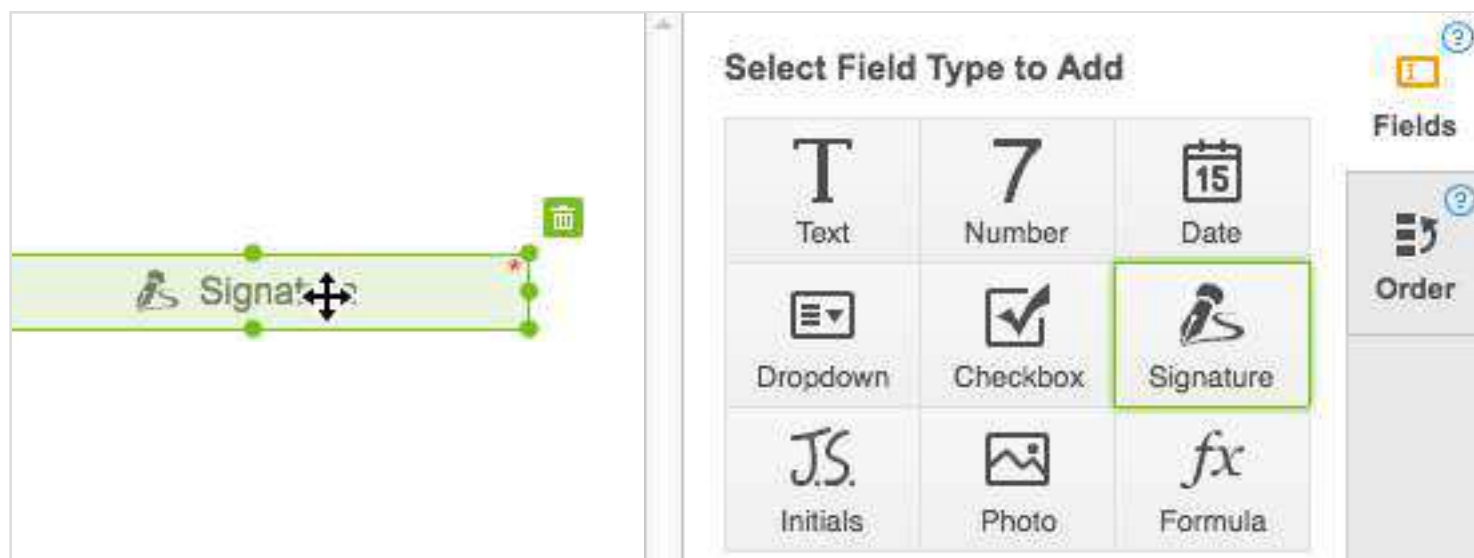
**Note.** Enter any instructions or tips for filling the field.

**Database Field Name.** Create a name for the field that will appear when you export filled data to a spreadsheet or when you use a DaDaDocs API.

## Signature Field



To add a signature field, click the **Signature** icon and drag the field where you want to place it.



Anyone filling the document can click the signature field and use the DaDaDocs signature tool to sign the document.

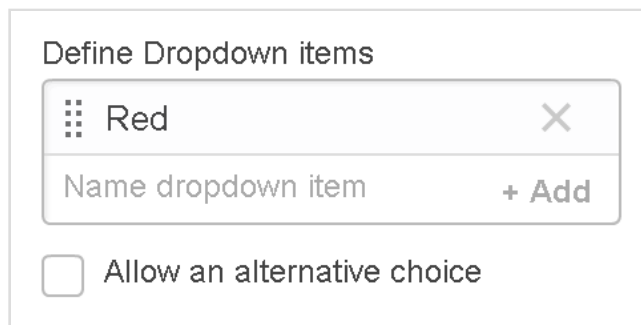
## Dropdown Field

To add a fillable dropdown field, click **Dropdown** and drag the field where it should be in the document.



To help users choose an item from the list, provide a suggestion in the **Add Some Text to Help** textbox.

To add an item to the list, type a new value in the empty field and click + Add. To allow users to provide their own alternative, check the respective box.



Define Dropdown items

⋮ Red ×

Name dropdown item + Add

Allow an alternative choice

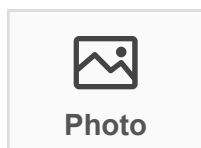
**Default.** Select the default item from the list you've created.

**Note.** Enter any instructions or tips for filling the field.

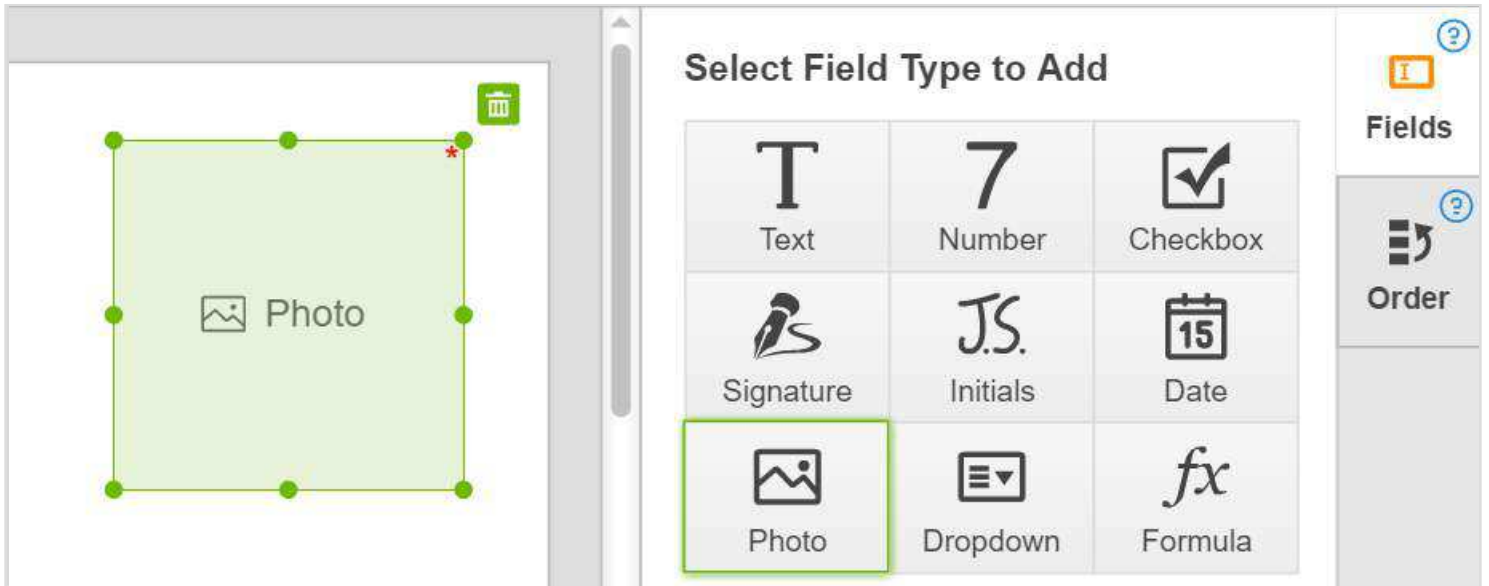
**Database Field Name.** Create a name for the field that will appear when you export filled data to a spreadsheet or when you use a DaDaDocs API.

Use the text formatting tools to preset the field's text format including the font, size, color and alignment of text.

## Photo Field



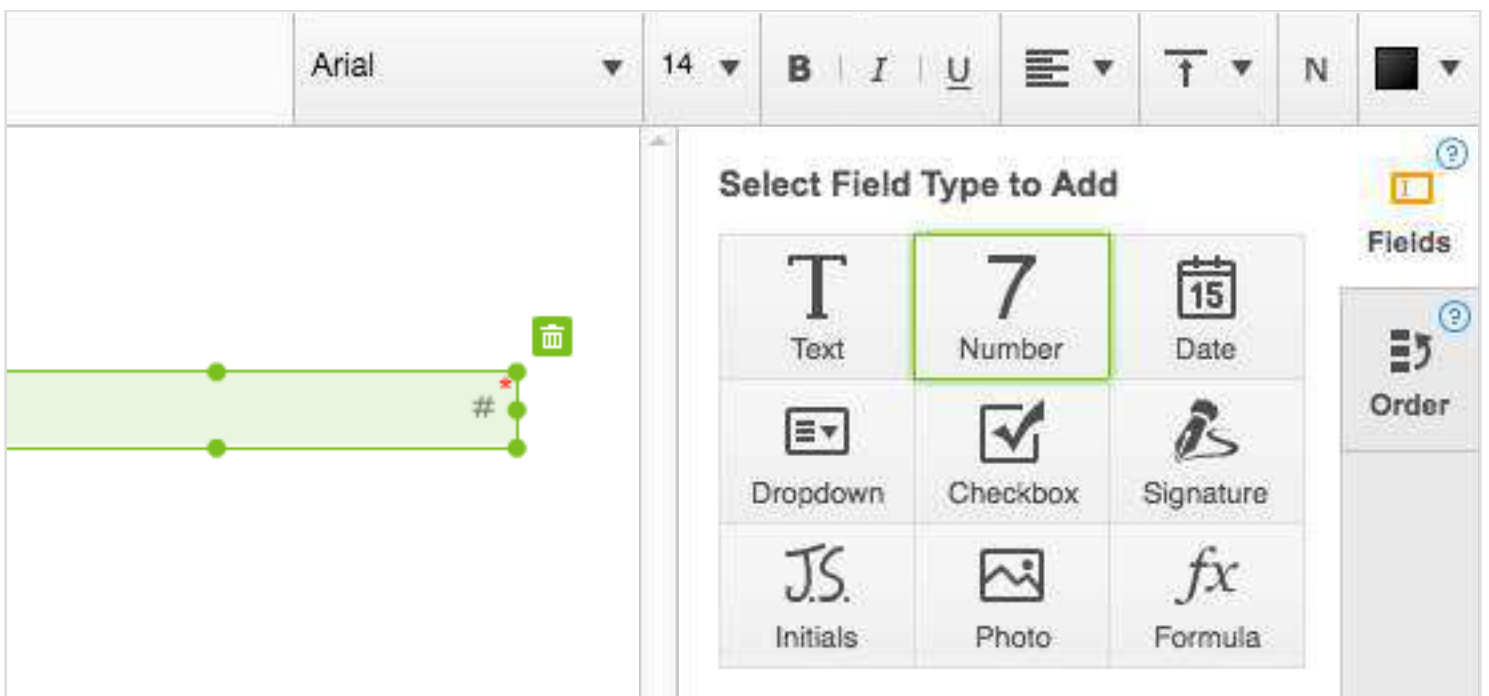
To add a photo field, click the Photo icon then click where you want to place it.



Anyone filling the document will be able to click the photo field and either upload a photo from their device or take one with their webcam.

## Number Field

To add a number field, click the Number icon and drag the field where you'd like to place it.



Use the text formatting tools to preset the field's number format including the font, size, color and alignment.

To customize the number field further, click **Advanced** to expand options.

**Default number** will appear in the field when others open the form. If you lock the field, nobody will be able to replace the default number.

**Note.** Here you can enter any instructions or tips for filling the field. Users will see the note when they hover their mouse over the field.

**Max Characters.** Set the maximum number of characters allowed in the field. The "auto" setting will limit that number to what can physically fit into the field.

**Database Field Name.** Create a name for the field that will appear when you export filled data to a spreadsheet or when you use a DaDaDocs API. You can use the database field name as an operand when creating formula fields.

## Formula Field

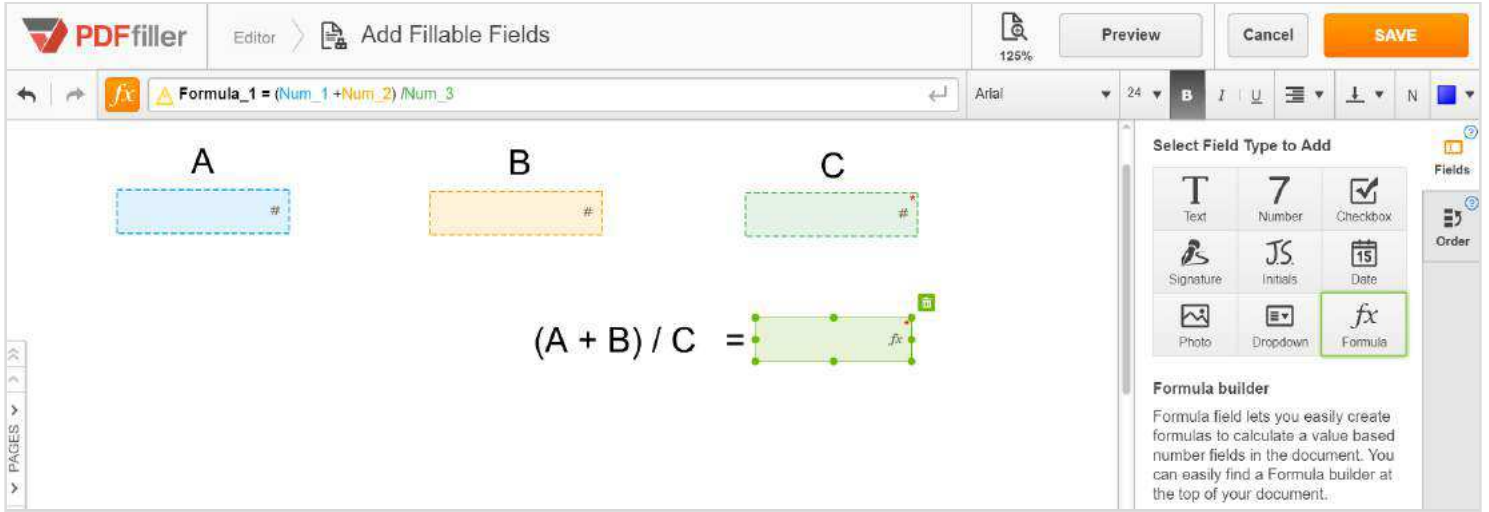
You can make a calculation using the formula field.



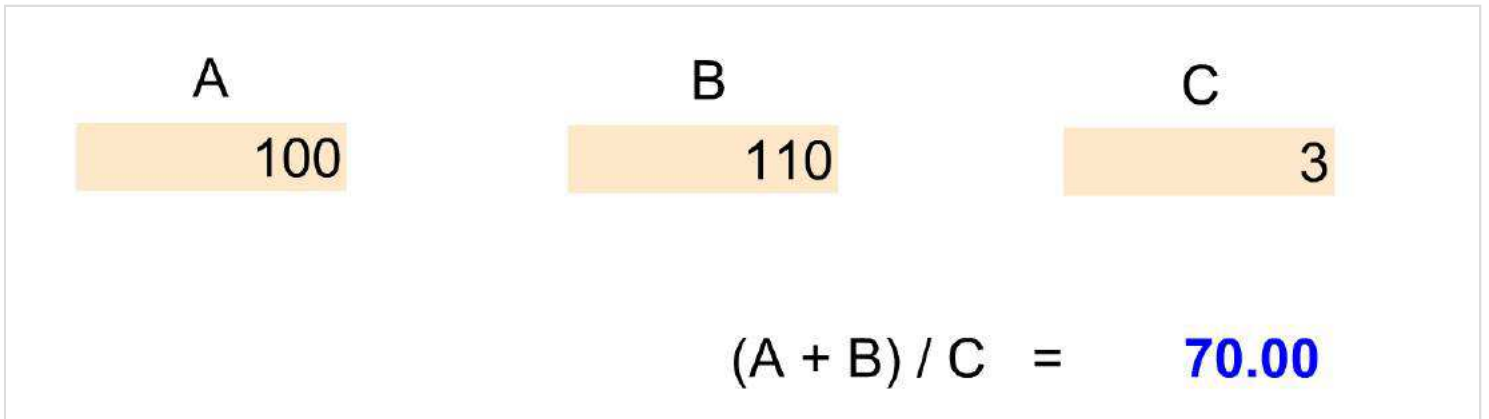
First, you need to create number fields that will be used as operands. Then, click **Formula** and place the formula field where you need it.

Write the formula in the **Formula Builder** just above the document using the number field names as operands.





When a user fills the number fields, the formula field will show automatically the result of calculation.



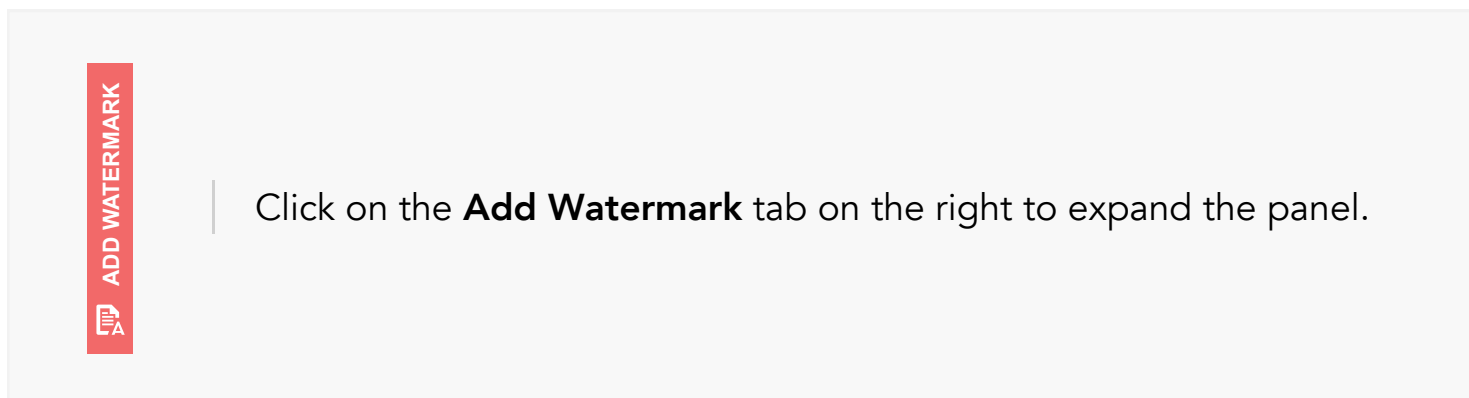
## Initials Field

To add a fillable field for initials, click the Initials icon and drag the field where you want to place it.

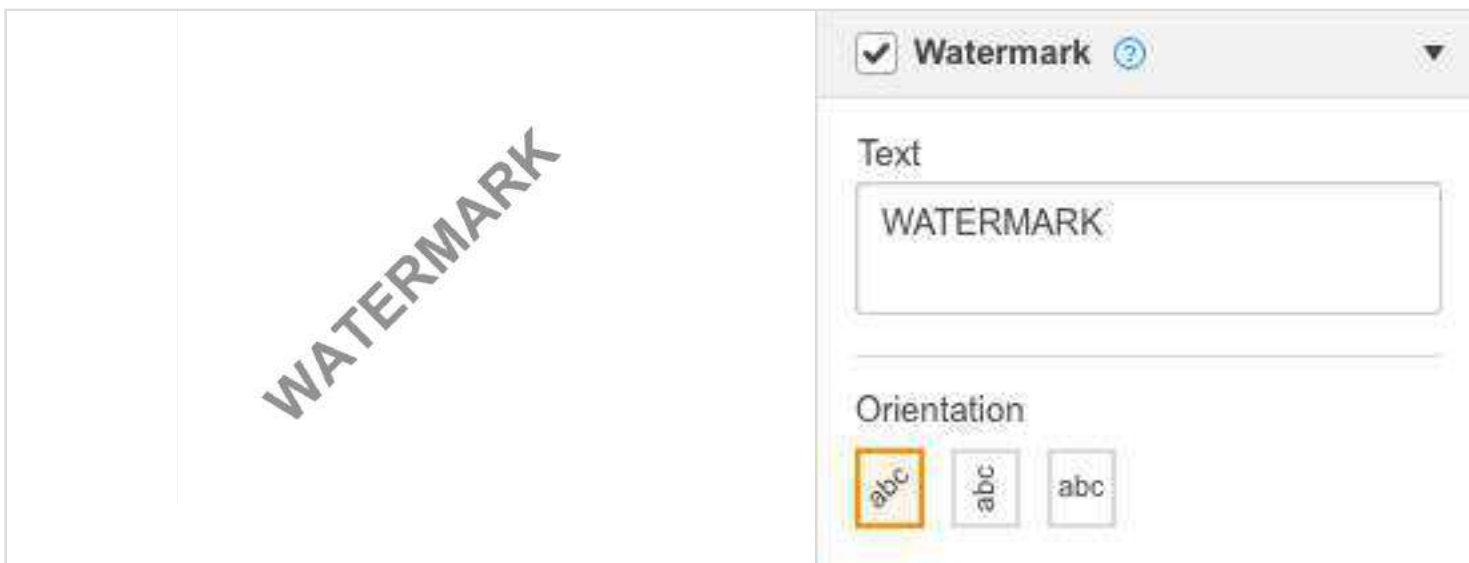


## Add a Watermark

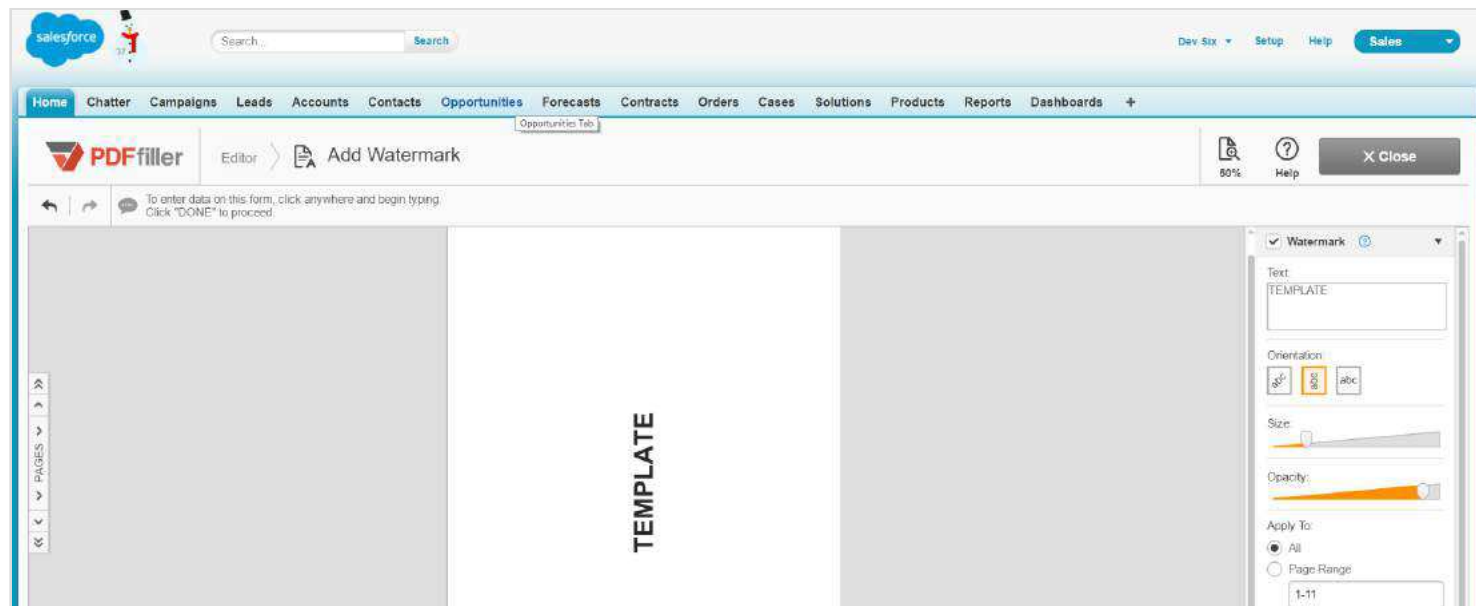
Add a custom watermark to PDF documents.



Check the box and add the text that you want to appear in the watermark.



After the orientation, size, and opacity of the watermark have been defined, you can see the changes to your document in real time -- simply select the pages you'd like to apply your watermark to to see how it looks.



To remove the watermark, uncheck the box.

## Add Page Numbers

Number the pages of a document with just one click.

While editing a document, open the Add Watermark tab on the right.

Select the Page Numbering dropdown menu to change the format, size and position of the numbers on the page. To hide page numbers, uncheck the box.




## View Changes and Versions

Track all edits in automatically saved versions of the document.



While editing a document, open the **Versions** tab on the right.

Here, you can view each saved document state (documents are saved each time you hit **DONE**).

Versions 
<b>Current Version</b>
<b>September 23, 2017 15:36</b>
<b>March 10, 2016 09:12</b>

To preview any previous version of the document, click on one of the timestamps listed.

## Restore a Previous Version

Clicking on **Restore this version** will revert your document to the previous state. You can undo this restore by returning to the **Versions** panel and choosing the most recent version.



To exit the versions preview, click **Close** in the top right corner of the page.

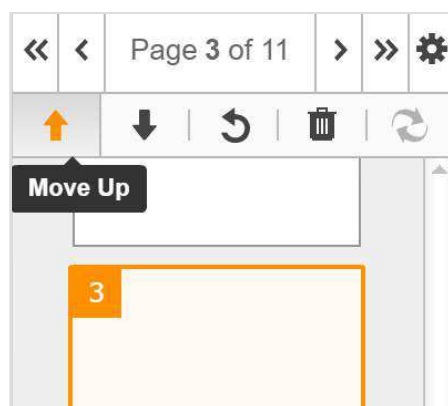


## Rearrange Pages

Change the order of pages in your PDF document.



Click **PAGES** on the left to open the navigation pane.



Select the thumbnail of the page you would like to move and then use the **Move Up** or **Move Down** icon at the top of the navigation pane.

Every time you click the **Move Up** or **Move Down** icon, the page will move respectively one step up or down.

## Rotate Pages

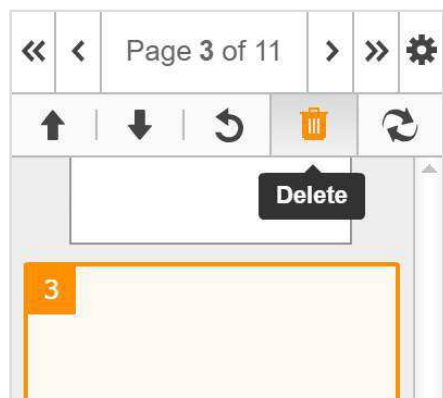
You can rotate any page in a PDF document. Select the page in the navigation pane and click the **Rotate** icon.



Every time you click the rotate tool, the page rotates counterclockwise 90 degrees.

## Delete Pages

To delete a page, select its thumbnail in the navigation pane and click the trash can icon above.



## Saving Documents

Before editing the document, you can decide if you want to create a new version or save all the changes to the existing document.

Enter a new file name to save the edited document as a new version and click **OK**.

Save edited document as:

The new version will contain all the edits that you've made, while the original document will remain unchanged. You'll find the new document in the Notes and Attachments list in Salesforce object.

**Notes & Attachments**

Action	Type	Title
<a href="#">Download</a>   <a href="#">Del</a>	File	<a href="#">Employment Agreement.pdf</a>
<a href="#">Preview</a>   <a href="#">Download</a>   <a href="#">Del</a>	File	<a href="#">Employment Agreement_new.pdf</a>
<a href="#">Preview</a>   <a href="#">Download</a>   <a href="#">Del</a>	File	<a href="#">Employment Agreement</a>
<a href="#">Preview</a>   <a href="#">Download</a>   <a href="#">Del</a>	File	<a href="#">Application</a>
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	Attachment	<a href="#">attach.pdf</a>

[Show more »](#) | [Go to list »](#)

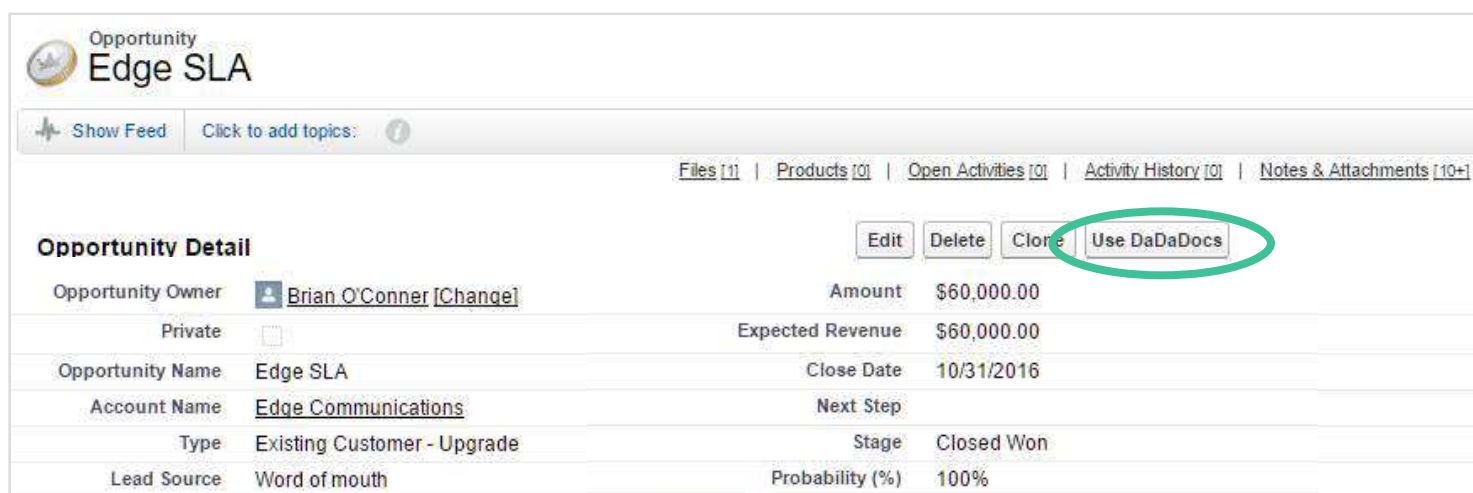
Alternatively, leave the name as it is to save all the changes to the original document.

Save edited document as:

## SendToSign: Request Signatures

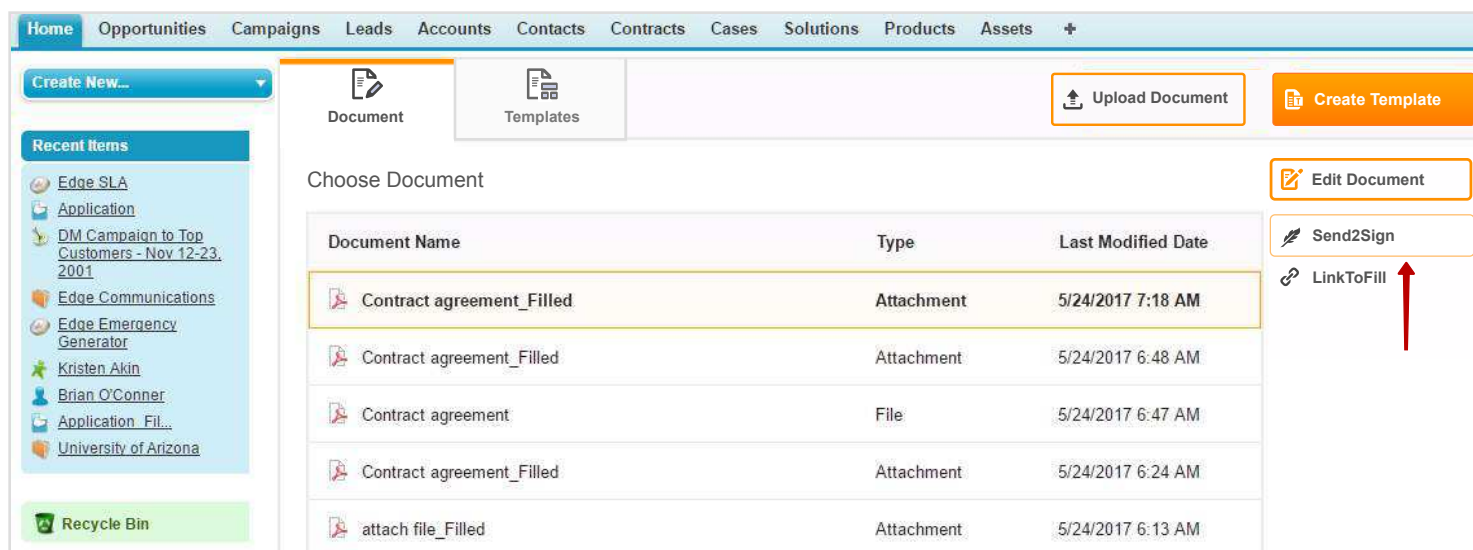
**SendToSign** is an easy way to request signatures. You can send a document to up to 20 recipients and ask them to sign it.

Click on the required object and select **Use DaDaDocs**.



The screenshot shows the Salesforce interface for an Opportunity named "Edge SLA". The "Opportunity Detail" section includes fields for Opportunity Owner (Brian O'Conner), Amount (\$60,000.00), Expected Revenue (\$60,000.00), Opportunity Name (Edge SLA), Close Date (10/31/2016), Account Name (Edge Communications), Next Step, Type (Existing Customer - Upgrade), Stage (Closed Won), and Lead Source (Word of mouth). The "Use DaDaDocs" button is circled in green.

Select a document from the list and click **SendToSign**.



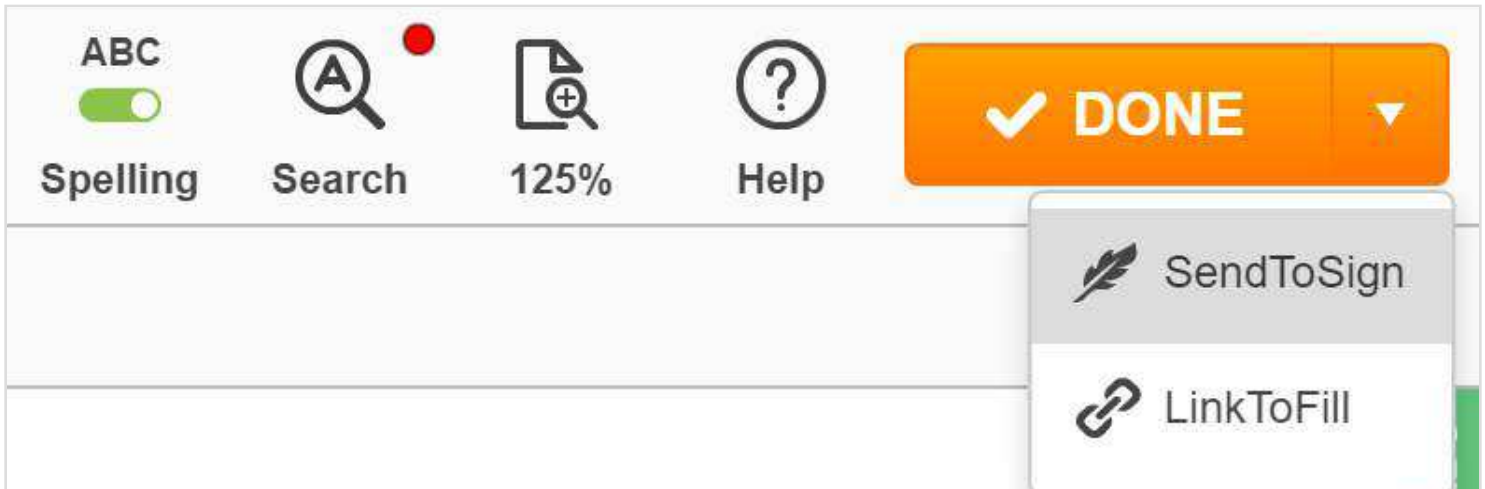
The screenshot shows the Salesforce Document Management interface. The "Choose Document" section displays a list of documents:

Document Name	Type	Last Modified Date
Contract agreement_Filled	Attachment	5/24/2017 7:18 AM
Contract agreement_Filled	Attachment	5/24/2017 6:48 AM
Contract agreement	File	5/24/2017 6:47 AM
Contract agreement_Filled	Attachment	5/24/2017 6:24 AM
attach file_Filled	Attachment	5/24/2017 6:13 AM

The "Send2Sign" button is highlighted with a red arrow.



Alternatively, send the document out for signatures directly from the editor. When you've finished editing the document, click the **Done** button and select **SendToSign** from the dropdown menu.



**Select Your SendToSign Method.** There are two options for requesting digital signatures: **SendToEach** and **SendToGroup**.

## 1. Select Your SendToSign Method

### **SendToEach**

Send up to 20 unique copies of this document to be individually signed by each recipient. You will receive a confirmation email as each copy is signed.

### **SendToGroup**

**Sign in Order** 

Send a single copy of this document to be signed by up to 20 recipients, in any order or in a specific order. You will receive a confirmation email once the document has been signed by all recipients.

**SendToEach:** Send up to twenty unique copies of the document to be individually signed by each recipient. You will receive a confirmation email as each copy is signed.

**SendToGroup:** SendToGroup allows you to send a single copy of the document to up to twenty people. Once all the recipients sign the document, you will receive a confirmation email.

To create your signature request, add the email address and name of the recipient(s).

The screenshot shows the '2. Add Your Recipients' form. At the top, there are two input fields: 'Recipient Email' and 'Recipient Name', each with a person icon and a plus sign. To the right of the 'Recipient Name' field is a trash icon and an 'Options' dropdown arrow. Below these fields are three sections of settings:

- Two-way Authentication:** A toggle switch is currently set to 'Disable'. To its right is a 'Phone Number' input field.
- Editing Permissions:** A toggle switch is currently set to 'Full Access'. To its right is a checkbox labeled 'Require a photo for signature authentication' which is currently unchecked.
- Request Additional Documents:** A text input field with a plus icon and the placeholder text 'Add document name'.


Below these settings is a 'Message' section with a text area containing the following text:

Subject: Please sign this document with PDFfiller  
Please sign and return the linked document with PDFfiller. If you have any questions, please contact me.

At the bottom of the form is a yellow button with a plus icon and the text 'Add Another Recipient'.


## Signer Authentication

If you choose to enable two-factor authentication, move the slider to the right and enter the recipient's phone number.

**Two-way Authentication** 


The recipient will get a unique passcode via text message. To open the document, the recipient will have to enter this passcode.

## Editing Permissions

**Editing Permissions** 

If you set the editing permissions to **Signature Only**, the recipient will only be able to sign and date the document. If you select **Full Access**, the recipient will also be able to edit the document using all our editing tools in addition to signing the document.

**Request a photo for signature authentication.** If you select this option, the recipient will have to prove their identity by taking a photo with their webcam before returning the signed document.

 Require a photo for signature authentication 

## Write a message to the recipient

### Message

Subject: Digital signature request from ...

Please sign and return the linked document. If you ha

Add more recipients by clicking **Add Another Recipient**.

 **Add Another Recipient**

**Request a photo for signature authentication.** If you select this option, the recipient will have to prove their identity by taking a photo with their webcam before returning the signed document.

If you select to request signatures using SendToGroup, create an envelope name to label your group. Only you will be able to see this label.

## 2. Enter Your Envelope Name

Envelope #1

Use the **Sign in Order** option to set the order in which SendToGroup recipients receive their requests to sign the document. Check the **Sign in Order** box and then either drag or type to the left of each recipient their sequence number to set the desired order.

### 3. Add Your Recipients

Sign in Order [?](#)

	1	RECIPIENT_1@ .com		John		Options
	2	RECIPIENT_2@ .com		Paul		Options

### 3. Add Your Recipients

Sign in Order [?](#)

	1	RECIPIENT_2@ .com		Paul		Options
	2	RECIPIENT_1@ .com		John		Options

**Add fillable fields and assign roles.** Use this tool to create checkboxes and fillable fields for various types of data including text, numbers, signatures, dates and photos. For more information, please refer to the **Fillable Fields** section of this guide. You can assign a fillable field to a particular recipient so that only this recipient will be able to fill it. Click **Add Fillable Fields and Assign Roles**.

#### 4. Add Fillable Fields and Assign Roles to your document

**NEW**

Create a fillable template by adding and assigning fields to the recipients: Sample\_PDF\_0002.pdf

This tool allows you to quickly place text fields, number fields, checkbox fields, date fields, signature and photo fields anywhere on a document, making it even easier for anyone to fill them faster. You can assign the fields to individual recipients making only those fields accessible to them. After you're done adding fields, you can preview how each recipient will see the document.

[Add Fillable Fields and Assign Roles](#)

On the page that opens next, add fillable fields and assign them to the recipients. Choose the field type in the right pane and click where you need to place the field. Then, select from the dropdown list the recipient who will have the exclusive right to fill the field.

Editor > Add Fields & Assign Roles 144% Preview Cancel SAVE

**SIGNATURES:**

John ..... [Signature]

Paul .....

Select Field Type to Add

T Text	7 Number	15 Date
▾ Dropdown	☑ Checkbox	✍ Signature
ℑ Initials	📷 Photo	fx Formula

Who Needs to Fill This Out

- Not assigned
- Not assigned
- John (recipient\_1@...com)
- Paul (recipient\_2@...com)

Required field \*

Advanced -

Note (Optional)  
e.g. Please check...

Editor > Add Fields & Assign Roles 144% Preview Cancel SAVE

**SIGNATURES:**

John ..... [John] Signature

Paul ..... [Paul] Signature

Select Field Type to Add

T Text	7 Number	15 Date
▾ Dropdown	☑ Checkbox	✍ Signature
ℑ Initials	📷 Photo	fx Formula

Who Needs to Fill This Out

- Paul (recipient\_2@pdfiller...)
- Not assigned
- John (recipient\_1@...com)
- Paul (recipient\_2@...com)

Required field \*

Advanced -

Note (Optional)  
e.g. Please check...

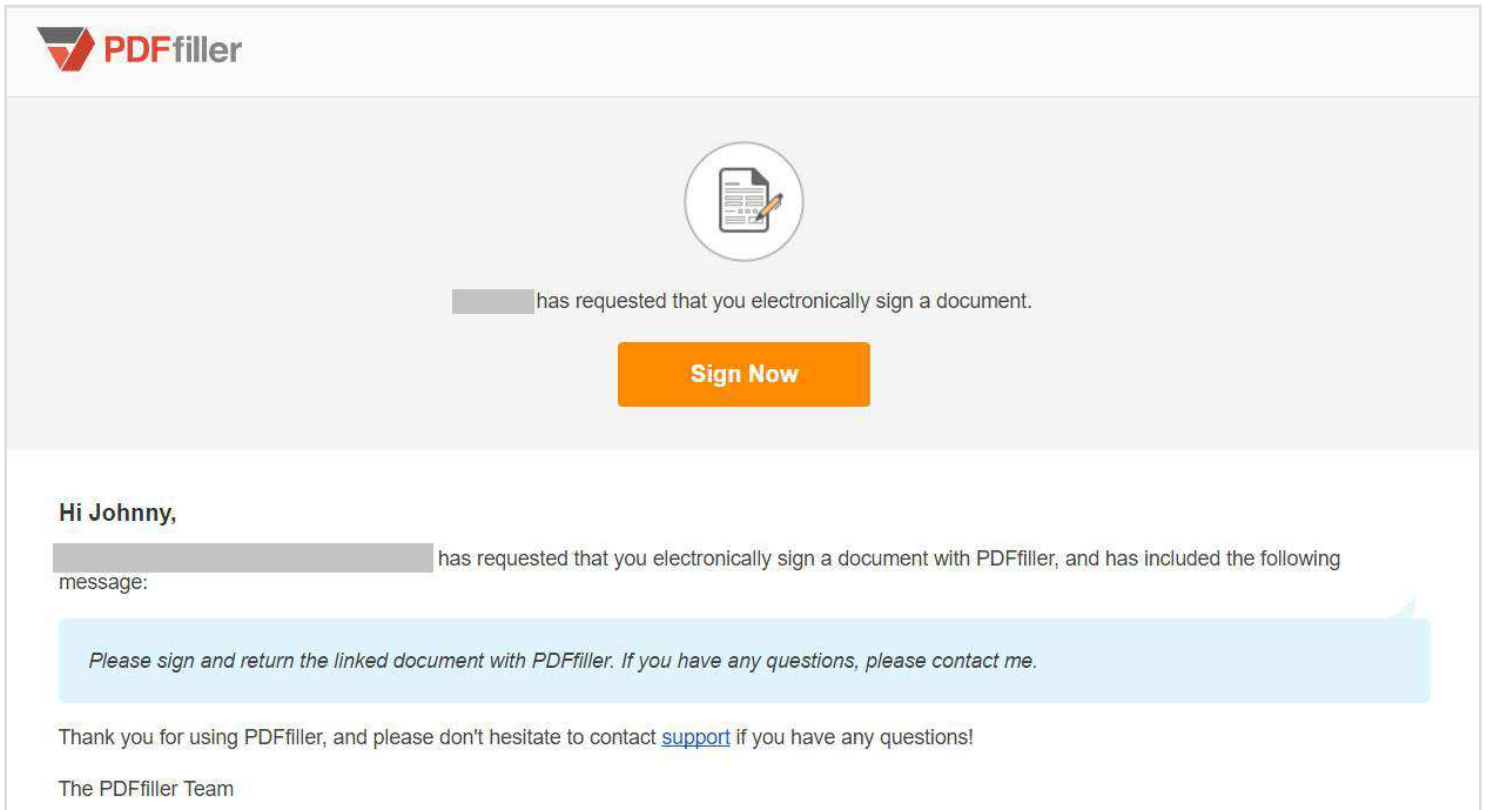
Press the **Preview** button in the top right corner, and on the page that opens next select a recipient from the dropdown list. You will see the document just as the selected recipient will see it.



Exit the preview mode and click Save in the top right corner to continue. Please note, that if you do not assign a fillable field to anyone, any recipient will be able to fill it.

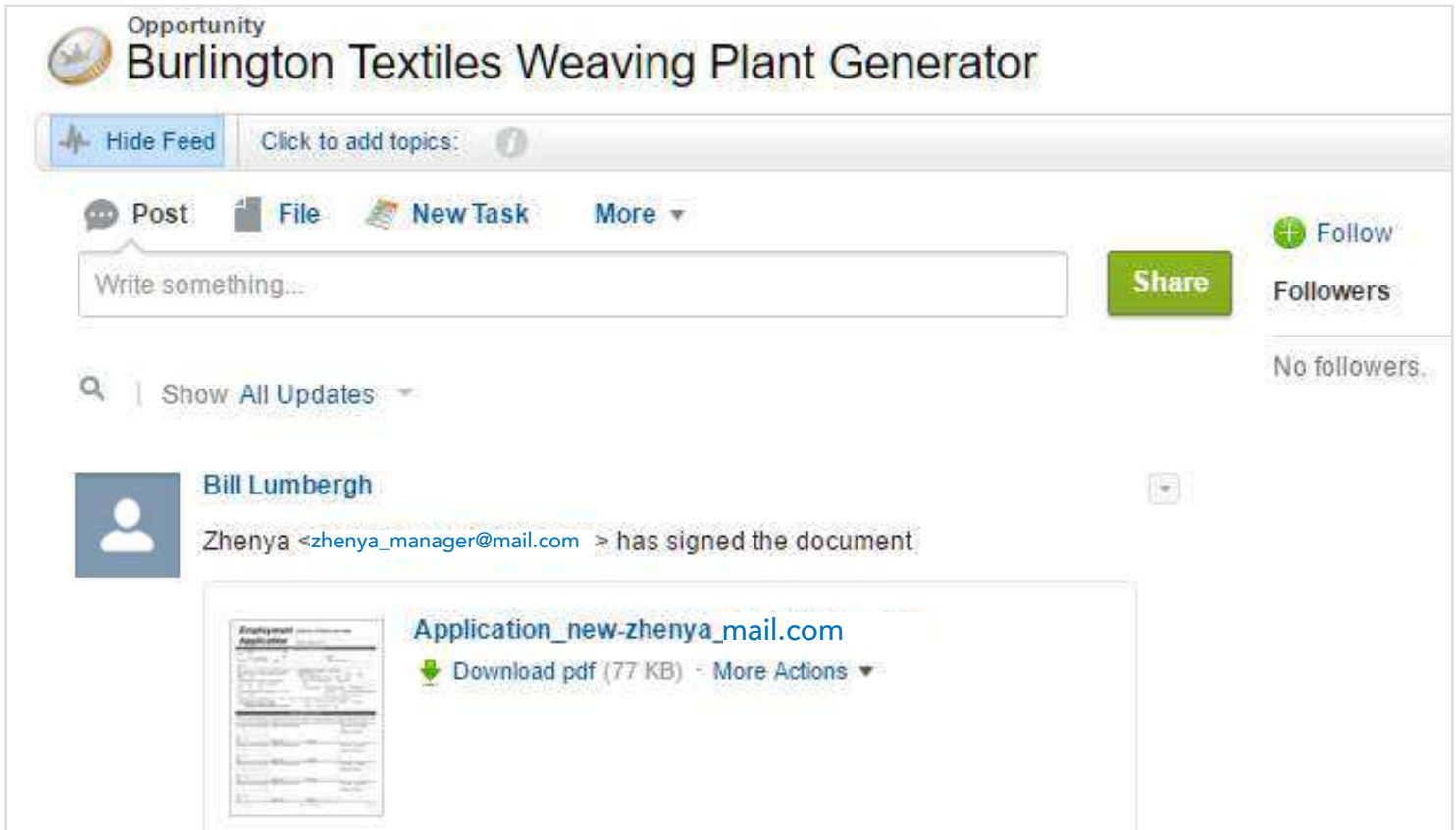
Finally, click **SendToSign** in the bottom right corner of the page.

The recipients will receive an email with your request to sign the document.



The link will open the document in the editor where the recipient will be able to sign it.

Once the document is signed, it will be automatically uploaded to your Salesforce account. Get status updates for the document via feed tracking.



Opportunity  
Burlington Textiles Weaving Plant Generator

Hide Feed Click to add topics: ?

Post File New Task More

Write something... Share

Follow  
Followers  
No followers.

Show All Updates

Bill Lumbergh

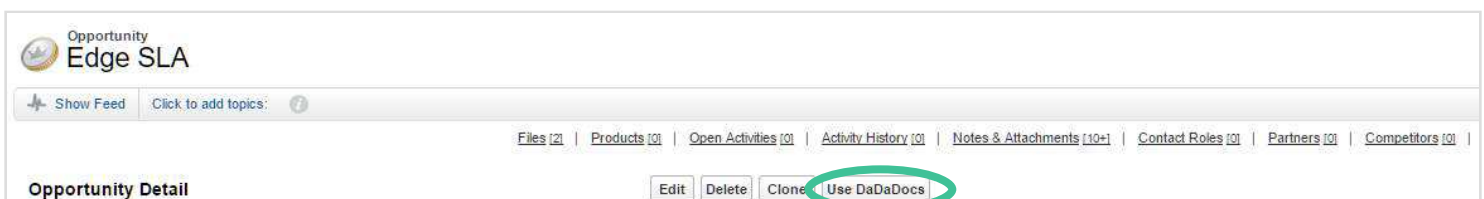
Zhenya <zhenya\_manager@mail.com> has signed the document

Application\_new-zhenya\_mail.com  
Download pdf (77 KB) More Actions

## Host Fillable Forms

Make your document publicly accessible. Create a link to the document and publish the link on your website as a button or an HTML link.

Click on the required object and select **Use DaDaDocs**.



Opportunity  
Edge SLA

Show Feed Click to add topics: ?

Files (2) | Products (0) | Open Activities (0) | Activity History (0) | Notes & Attachments (10+) | Contact Roles (0) | Partners (0) | Competitors (0)

Opportunity Detail

Edit Delete Clone Use DaDaDocs



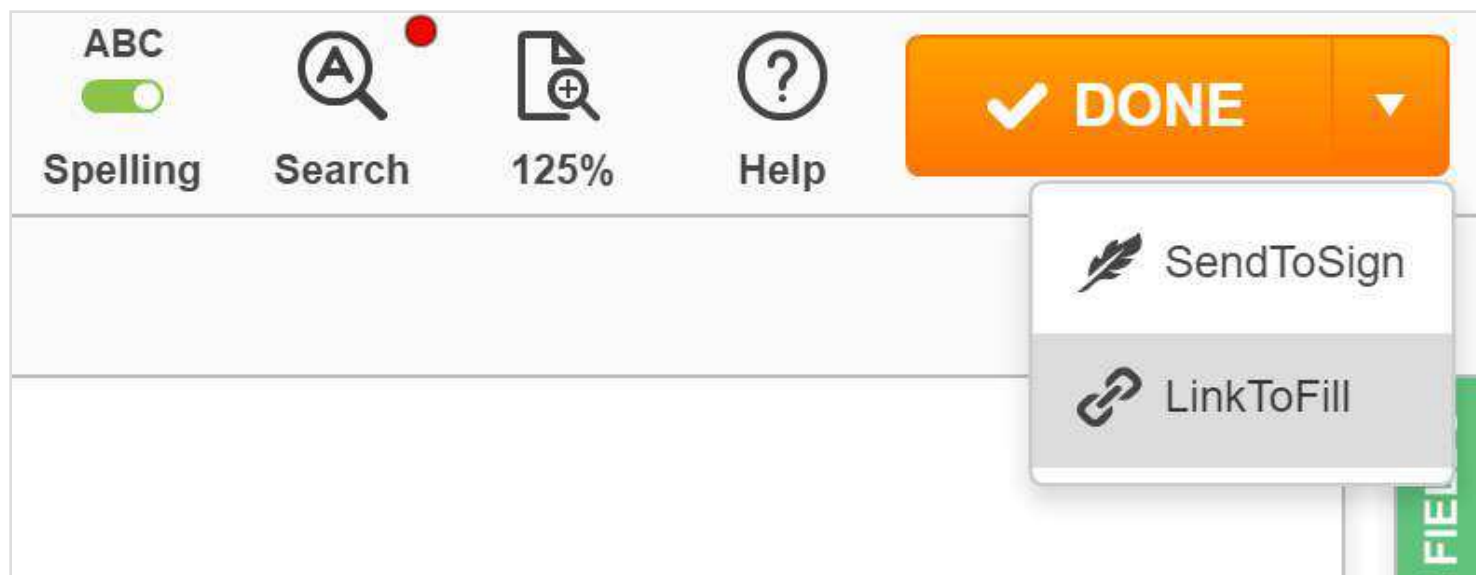
Select the document from the list and click **LinkToFill**.



The screenshot shows the Salesforce interface with the 'Document' tab selected. The 'Choose Document' section displays a table of documents. The first document, 'Contract agreement\_Filled', is highlighted. On the right side, the 'LinkToFill' button is highlighted with a red arrow.

Document Name	Type	Last Modified Date
Contract agreement_Filled	Attachment	5/24/2017 7:18 AM
Contract agreement_Filled	Attachment	5/24/2017 6:48 AM
Contract agreement	File	5/24/2017 6:47 AM
Contract agreement_Filled	Attachment	5/24/2017 6:24 AM
attach file_Filled	Attachment	5/24/2017 6:13 AM

Alternatively, while the document is open in the editor, click **Done** and select **LinkToFill** from the dropdown menu.



The screenshot shows the document editor interface. The 'DONE' button is highlighted, and a dropdown menu is open, showing the 'LinkToFill' option selected.

ABC  
Spelling

Search

125%

Help

✓ DONE

SendToSign

LinkToFill

## Customize the embeddable HTML link.

1. Customize 2. Select Options 3. Activate

**Add Fillable Fields**

Add fillable fields such as text, checkboxes, signature, and date. This ensures the document is filled in properly and fully completed, while making it easier for others to do so.

[Add Fields](#)

---

**Link or Button Text** ⓘ

Fill Online  
max 50 characters

**Link Style** ⓘ


Link **Small Button** Large Button

Use Icon (📄)

**Link Colors** ⓘ

Text Color:  Button Color:

**Custom Logo and Branding** ⓘ

[+ Add New Logo](#) 

Replace the default PDFfiller logo with your own (optional).  
Recommended dimensions: 160x50 px. Acceptable file types: JPG, GIF, or PNG. Max file size: 5 MB.

---

**Author's Info** ⓘ

Dev Six

Company

Job Title

**Welcome Agreement** ⓘ

On  Off

**Message** ⓘ

Please make sure all information on this form is correct before submitting. If you have any questions about using PDFfiller, please click the question mark.

**Video URL** ⓘ

https://www.youtube.com

[Select Options >](#)

**Add fillable fields to you document.** You can create checkboxes and fillable fields for various types of data including text, numbers, signatures, dates, and photos. For more information, please refer to the **Fillable Fields** section of this guide.

**Add Fillable Fields**

Add fillable fields such as text, checkboxes, signature, and date. This ensures the document is filled in properly and fully completed, while making it easier for others to do so.

[Add Fields](#)

**Customize your link's text.** Type your own text in the text field; it cannot be longer than 50 characters.

**Link or Button Text** ⓘ

FILL NOW  
max 50 characters

**Link Style** ⓘ


Link  Small Button  Large Button

Use Icon (📎)

**Link Colors** ⓘ

Text Color:

**PREVIEW**



**Choose a link style.** There are three styles available:

## text

**Link or Button Text** ⓘ

FILL NOW  
max 50 characters

**Link Style** ⓘ


Link  Small Button  Large Button

Use Icon (📎)

**Link Colors** ⓘ

Text Color:

**PREVIEW**



## small button

**Link or Button Text** ⓘ   
max 50 characters

**Link Style** ⓘ  Link  **Small Button**  Large Button

Use Icon (📄)

**Link Colors** ⓘ Text Color:  Button Color:

**PREVIEW**



## and large button


**Link or Button Text** ⓘ   
max 50 characters

**Link Style** ⓘ  Link  Small Button  **Large Button**

Use Icon (📄)

**Link Colors** ⓘ Text Color:  Button Color:

**PREVIEW**



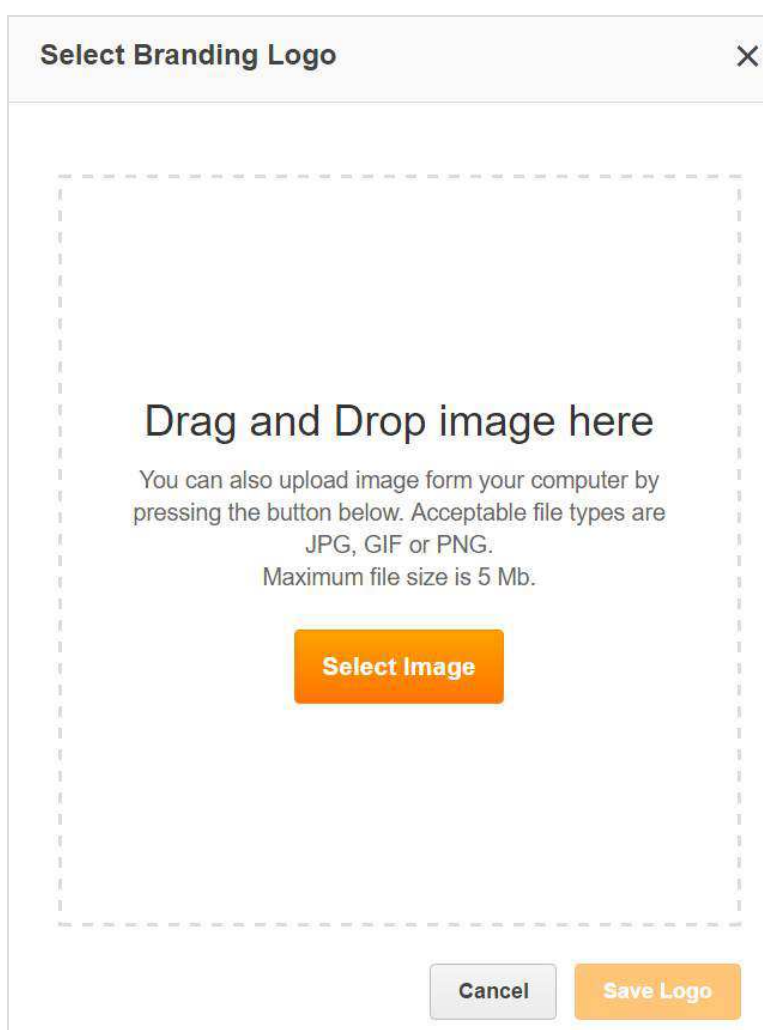
You can also choose whether to use the document icon or not just check or uncheck the corresponding checkbox.

Choose the link colors by clicking the colored squares.

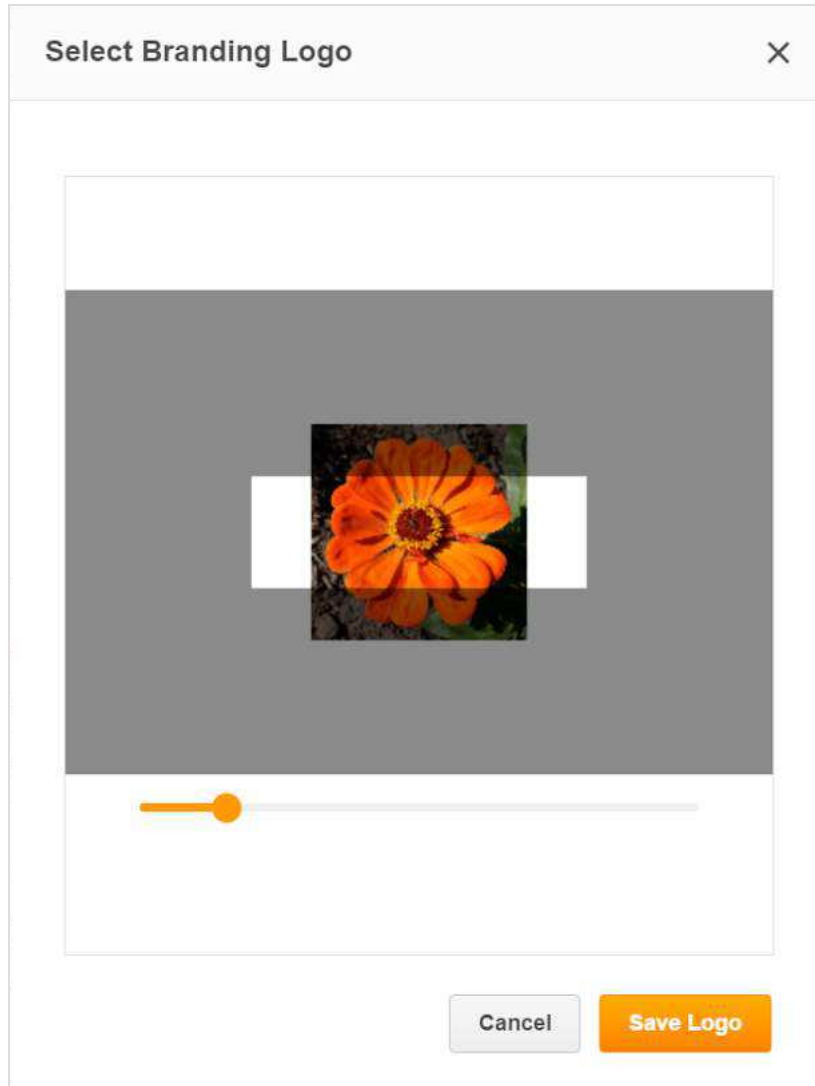
**Link Colors** ⓘ Text Color:  Button Color:

#2a6dde

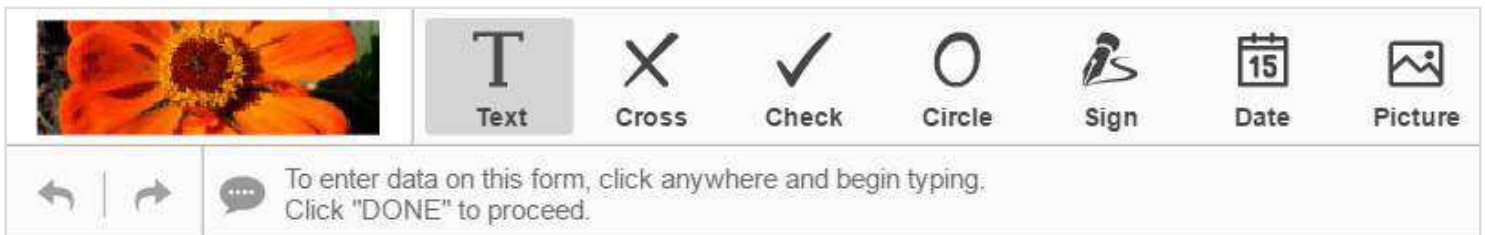
Upload a custom logo for your document. Click the **Add New Logo** button and follow your browser's tips to upload an image from your computer. The image should be in JPEG, GIF, or PNG format; its size cannot exceed 5 MB.



Use the slider to fit the image into the rectangular frame and click the **Save Logo** button.



Whoever fills the document will see your logo in the top left corner of the page. If you choose not to use this option, the DaDaDocs' logo will appear by default.



**Author's Info.** Add the name, company and job title of the document's author.


**Author's Info** 

**Welcome Agreement.** Activate this option if you want to request the recipient's consent to the terms and conditions of the use of electronic records and signatures.

**Welcome Agreement** 

**On**  **Off**

**Message.** Write a message, for instance, instructions or a request.

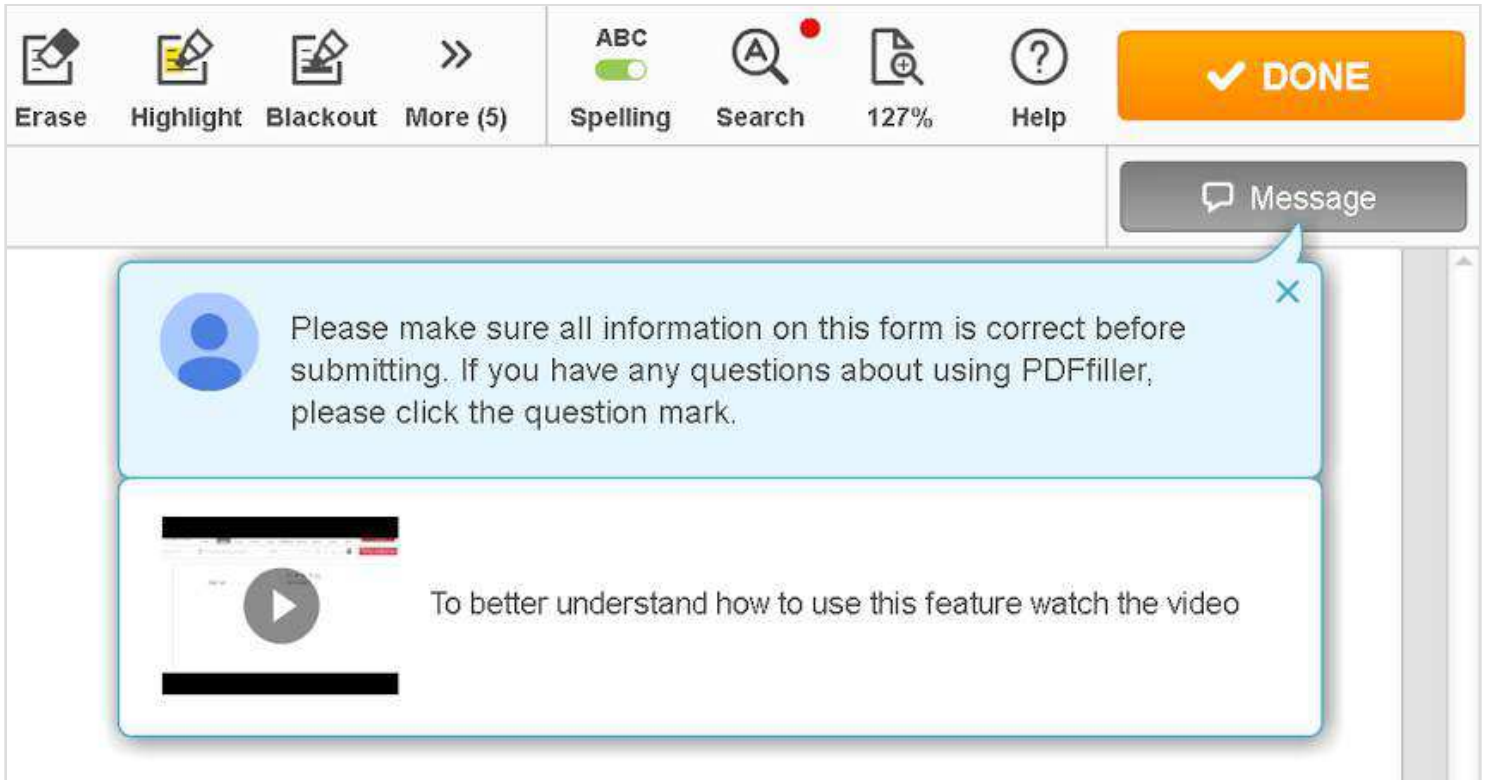
**Message** 

Please make sure all information on this form is correct before submitting. If you have any questions about using PDFfiller, please click the question mark.

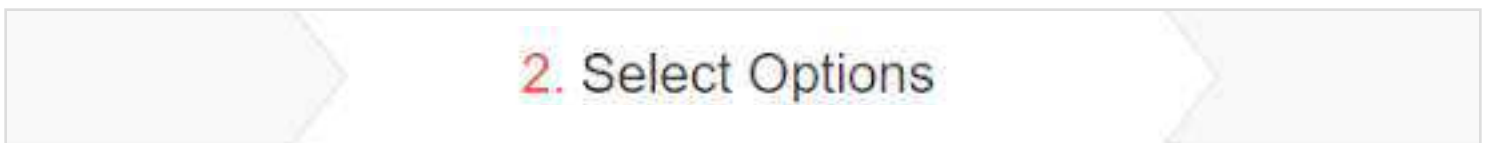
**Video URL.** Add an instructional, marketing or welcome video to the document by inserting a link to the video that you want to attach. Note that the video should be published on YouTube.

**Video URL** 

Whoever opens the document will be able to watch the video.

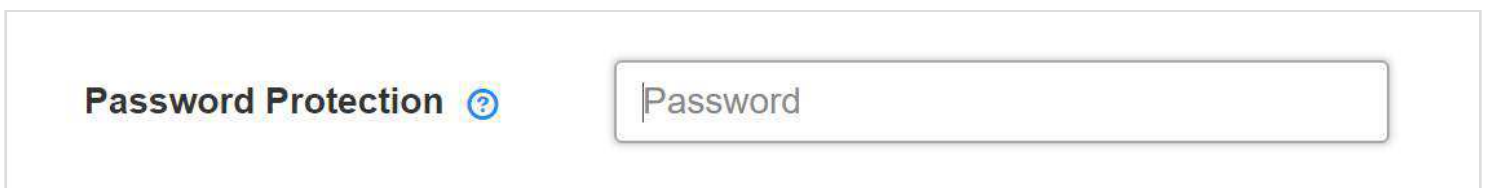


When you've finished customizing the HTML link, click **Select Options** in the bottom right corner of the page; this will open the **Select Options** tab.




## Select Options

**Password Protection.** Create a password to restrict access to the document. You will have to provide the password to those who need to access the document.





**Permissions.** Select **Full Access** to enable the recipients to edit the document using all of the DaDaDocs tools or select **Signature Only** to limit the editing capabilities to signature and date only.


Permissions 

Full Access    Signature Only

**Signature Stamp.** Choose whether you want to turn on the “Verified by DaDaDocs” stamp next to every signature. It serves as a “proof of notarization” showing that DaDaDocs, as a third neutral party, has verified the date and time when a recipient signed the document.

Signature Stamp   Enforce


**Submission Requirements.** You may request the name and email address from a person submitting the document.

Submission Requirements 

Require email address

Require name

**Download Options.** If you permit downloads, whoever fills the document will be able to get a copy of it.

Download Options 

Allow downloads

**Redirect After Submission.** As soon as visitors of your site submit the document, you can redirect them to any webpage you like -- just insert the URL address of the web page in the text field.



The screenshot shows a configuration panel with the label "Redirect After Submission" and a help icon. To the right is a text input field containing the URL "https://www.pdfFiller.com".

**Notifications.** You can choose whether or not to receive an email notification every time somebody submits the document. Enter email addresses of those who need to receive notifications.



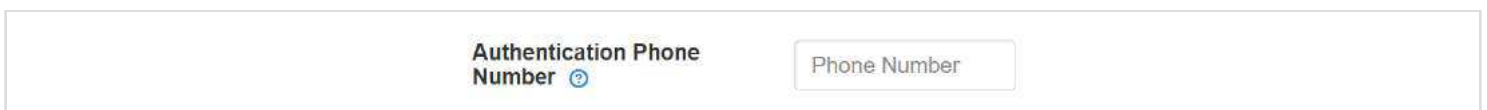
The screenshot shows the "Notifications" configuration section. It includes a "Notifications" label with a help icon, followed by three radio button options: "No notification", "Notification only" (which is selected), and "Notification with PDF copy of document". Below these is a "Notification Email(s)" label with a help icon and a text input field containing the placeholder "Add Email Address".

After you've selected all the relevant options, click **Activate** at the bottom of the page; this will open the **Activate** tab.



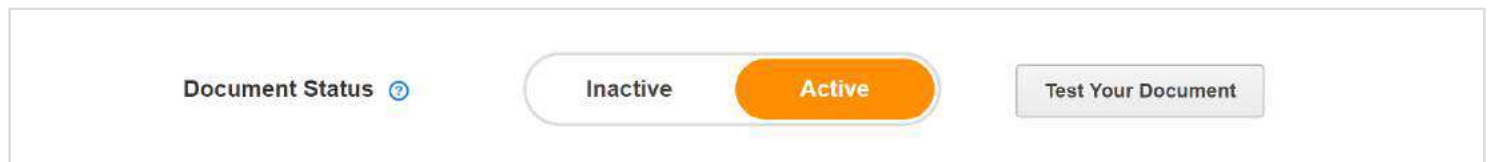
The screenshot shows a navigation bar with two tabs. The first tab is "2. Select Options" and is highlighted with a grey arrow pointing right. The second tab is "3. Activate" and is shown in red text.

**Authentication Phone Number.** Enter the phone number at which you want to receive a notification when activating LinkToFill. This phone must be able to receive SMS text messages.



The screenshot shows a configuration panel with the label "Authentication Phone Number" and a help icon. To the right is a text input field containing the placeholder "Phone Number".

**Set the Document Status.** Change the document's status to "Active" or "Inactive".



Once the document is active, you will be able to distribute it using its URL address, HTML code, or QR code.

## Distribute Your Document

**URL.** Provide a URL to those who need to complete your document.

Distribute your form.

**1** Fill this form anytime, anywhere, and on any device.

This URL will open your form on any desktop or mobile internet browser

Inserted in the address bar of any web browser, the URL will open your document in the DaDaDocs editor for completing, signing, and submitting.

**QR Code.** Download the QR code and add it to any printed document, booklet, leaflet, etc.



Smartphone users will be able to scan the code with their cameras to easily access the document on their devices.

**HTML Link.** To create a button or a text link on your website, copy and paste the HTML code to your website's HTML.

**2 Add the Fill Form button to your website.**

Copy and paste this code into your website's HTML to display the button or text link you have designed:

```
<link rel="stylesheet" type="text/css" href="https://www.pdfFiller.com/css_v2/link2fill-0.1.min.css">
<a href="http://pdf.ac/4JJVV1" target="_blank" title="PDFfiller.com: " style="color:#2e72e7;background:#00ff9c" class="pdfFiller-
fill_form_btn_pdfFiller_fill_form_btn_large"><img alt="PDFfiller fill form btn icon" data-bbox="103 342 906 386"/>
```

Your website's visitors will be able to open the document in the DaDaDocs editor where they can easily fill, sign, and submit the document with just a few clicks.


**Social Networks.** You can also share your document through social networks such as Facebook, Twitter or Google+.

**3 Share your form to Social networks.**

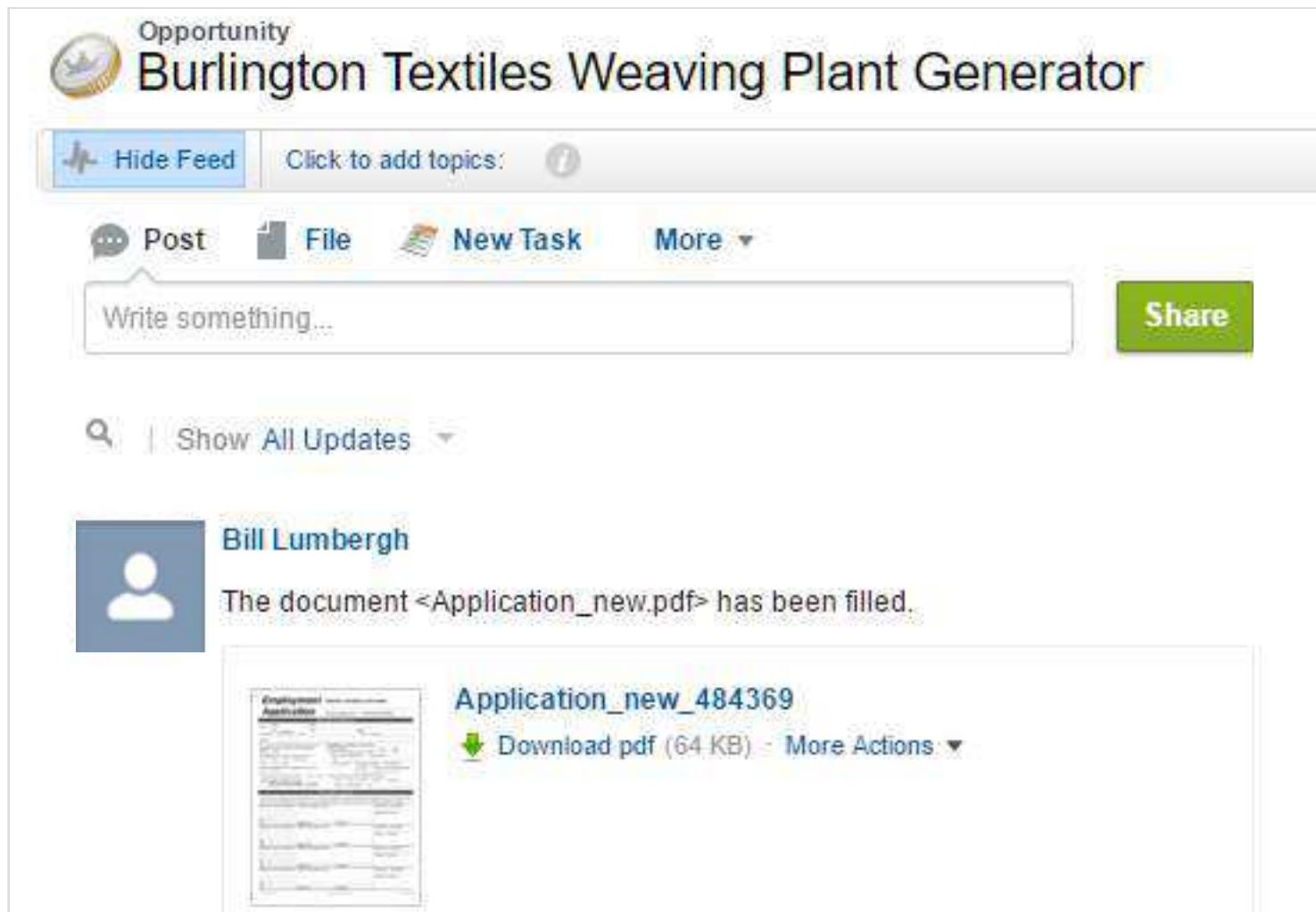
Click one of the buttons below and log into Facebook, Twitter, or Google+ to share your document's URL through these social networks.

 Share on Facebook

 Share on Twitter

 Share on Google

Every time the recipient fills or submits the document, it will be automatically uploaded to your Salesforce account. The notification will appear in the feed tracking and the document's owner will receive an email notification (if this option was selected).



The screenshot shows a Salesforce interface for an Opportunity record titled "Burlington Textiles Weaving Plant Generator". At the top, there is a "Hide Feed" button and a "Click to add topics:" section. Below this, there are action buttons for "Post", "File", "New Task", and "More". A text input field with the placeholder "Write something..." and a green "Share" button are also visible. A search icon and a "Show All Updates" dropdown are located below the input field. The main feed item is from "Bill Lumbergh" and contains the text "The document <Application\_new.pdf> has been filled." Below the text is a preview of a PDF document titled "Application\_new\_484369" with a "Download pdf (64 KB) - More Actions" link.

## Lightning Experience

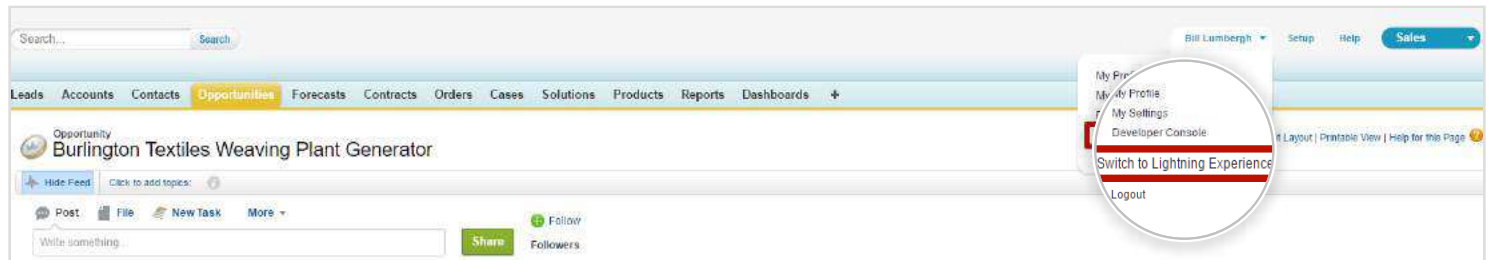
Now DaDaDocs users can enjoy all the advantages of the new Salesforce **Lightning** technology. The refreshed **Lightning** interface will maximize sales and boost productivity.

The Lightning Experience allows you to use all the powerful features of the DaDaDocs editor, form builder and eSign solution.

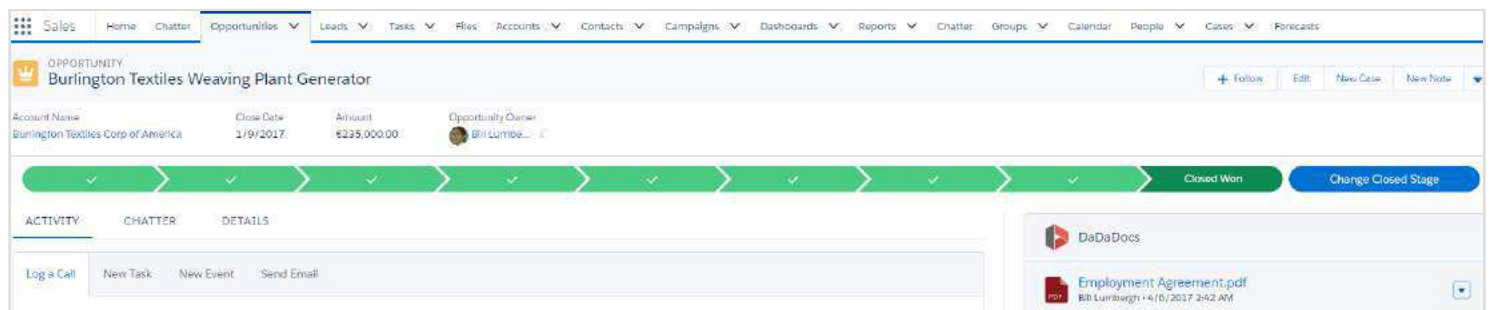
Read more about Lightning Experience and the installation process here:

[https://trailhead.salesforce.com/trails/lex\\_admin\\_migration](https://trailhead.salesforce.com/trails/lex_admin_migration)

To switch to the Lightning interface, click on the user's name on the top Salesforce panel and choose **Switch to Lightning Experience**.



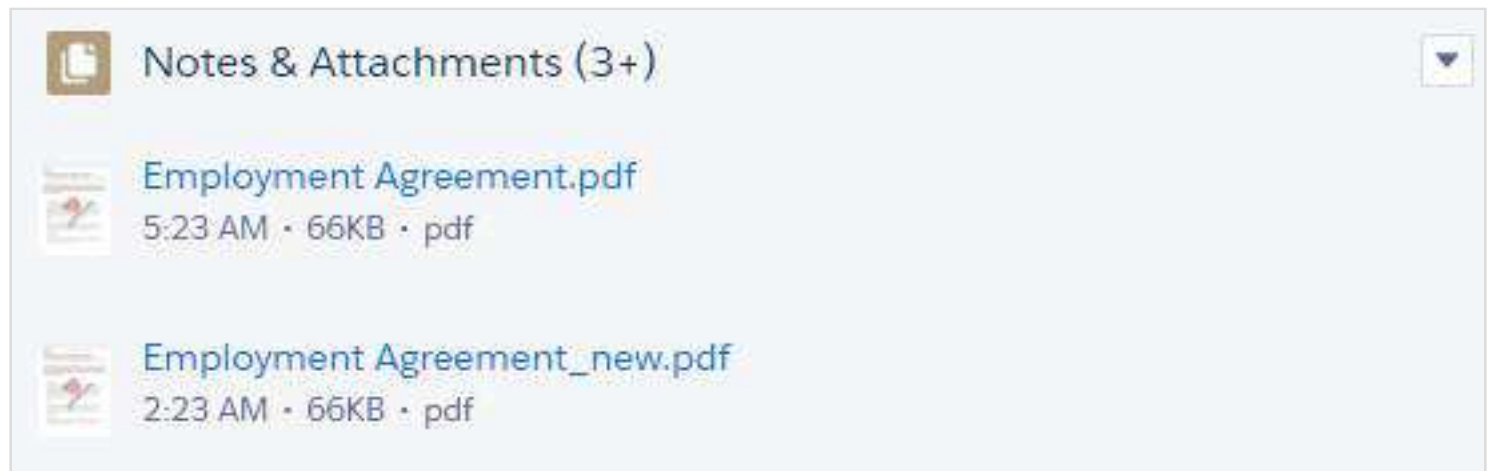
Lightning technology provides instant access to your documents.



Choose the document you want to use and click the dropdown menu on the right to select the appropriate option.



You can find edited documents in the Notes and Attachments list on the right panel of a Salesforce object



A screenshot of the Salesforce interface showing the 'Notes & Attachments (3+)' section. The section header is in blue text with a document icon to its left and a dropdown arrow to its right. Below the header, there are three entries, each with a document icon, a title, and a timestamp, size, and file type. The first entry is 'Employment Agreement.pdf' with a timestamp of '5:23 AM', size of '66KB', and file type of 'pdf'. The second entry is 'Employment Agreement\_new.pdf' with a timestamp of '2:23 AM', size of '66KB', and file type of 'pdf'. The third entry is 'Employment Agreement' with a timestamp of '2:22 AM', size of '66KB', and file type of 'pdf'.

Notes & Attachments (3+)

Employment Agreement.pdf  
5:23 AM · 66KB · pdf

Employment Agreement\_new.pdf  
2:23 AM · 66KB · pdf

Employment Agreement  
2:22 AM · 66KB · pdf

or in the Files list in Chatter.



A screenshot of the Salesforce interface showing the 'Files (3+)' section. The section header is in blue text with a document icon to its left and a dropdown arrow to its right. Below the header, there are three entries, each with a document icon, a title, and a timestamp, size, and file type. The first entry is 'Employment Agreement.pdf' with a timestamp of '5:23 AM', size of '66KB', and file type of 'pdf'. The second entry is 'Employment Agreement\_new.pdf' with a timestamp of '2:23 AM', size of '66KB', and file type of 'pdf'. The third entry is 'Employment Agreement' with a timestamp of '2:22 AM', size of '66KB', and file type of 'pdf'.

Files (3+)

Employment Agreement.pdf  
5:23 AM · 66KB · pdf

Employment Agreement\_new.pdf  
2:23 AM · 66KB · pdf

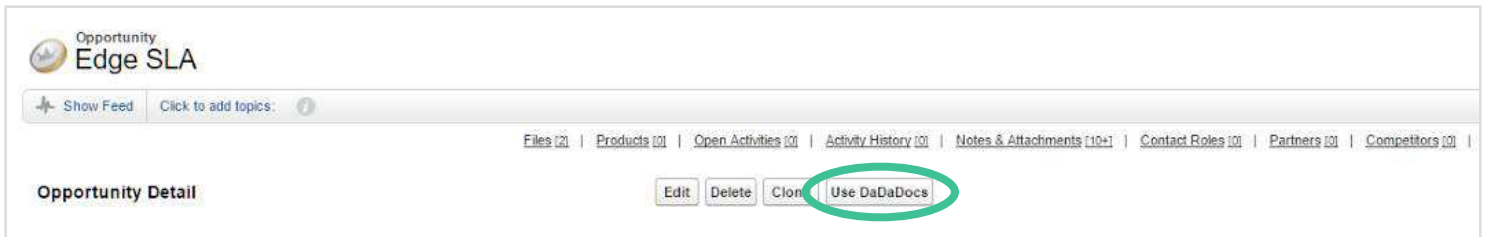
Employment Agreement  
2:22 AM · 66KB · pdf

# Templates

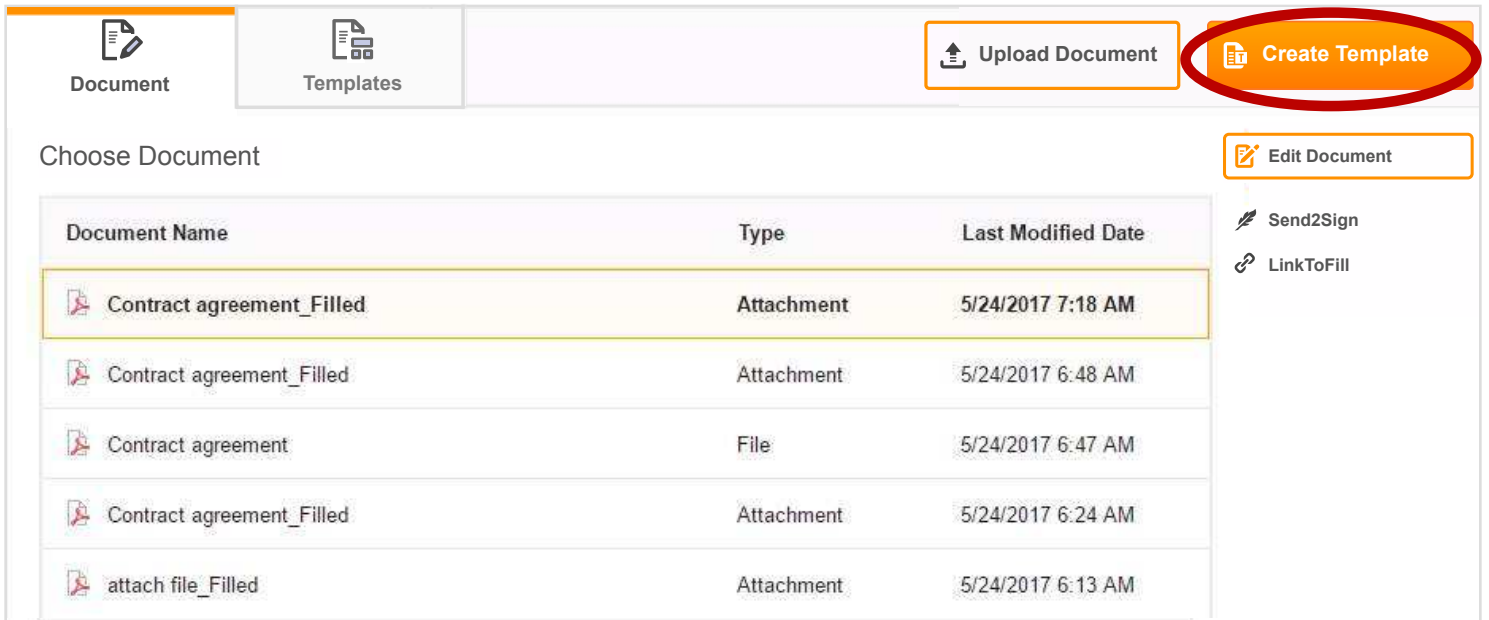
DaDaDocs announces the new template feature designed specifically for Salesforce.

Now you can create templates using existing documents and connect fillable fields to data from Salesforce objects. Send pre-filled documents out for signing or make them publicly accessible via a button or link.

Click on the required object and select **Use DaDaDocs**.

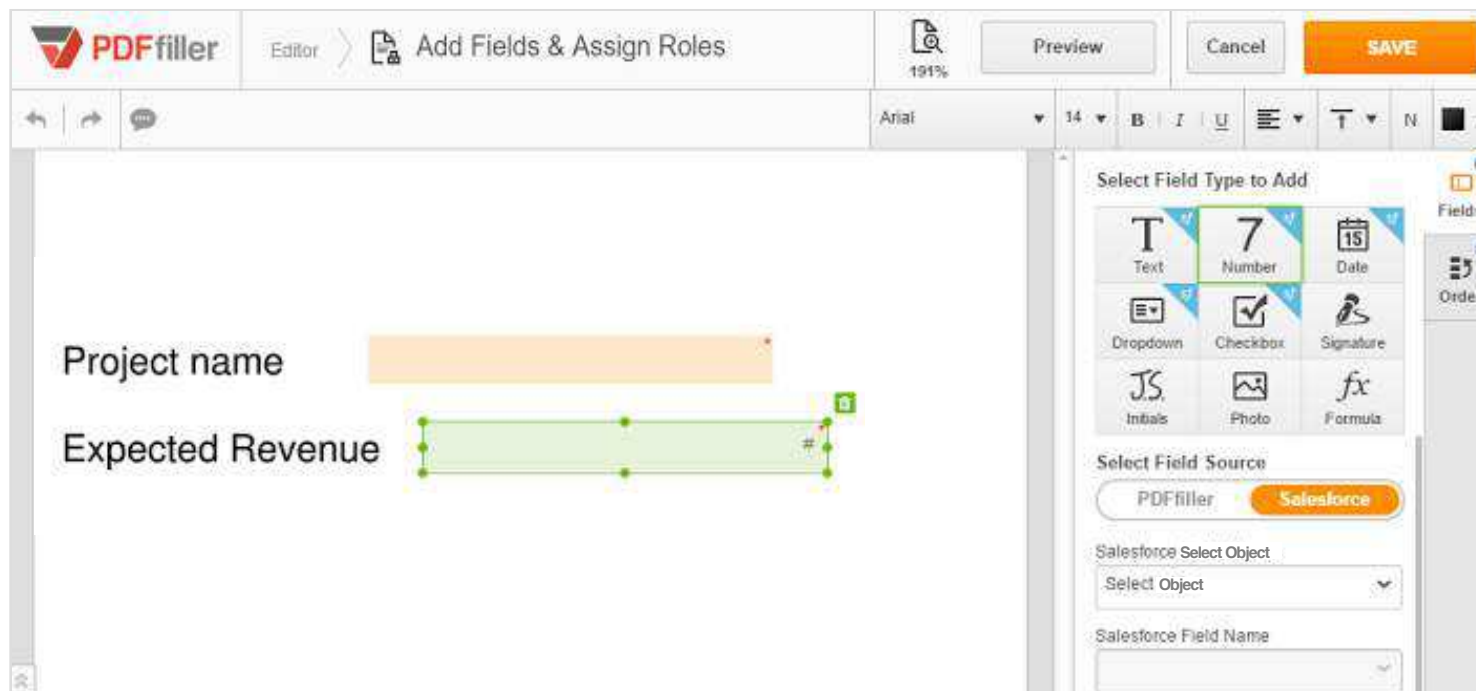


Select the document that you want to use as a template and click **Create Template**.

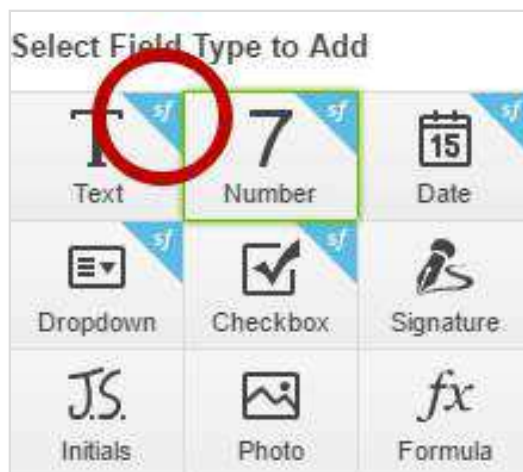




Add fillable fields to the document using DaDaDocs' drag and drop wizard.



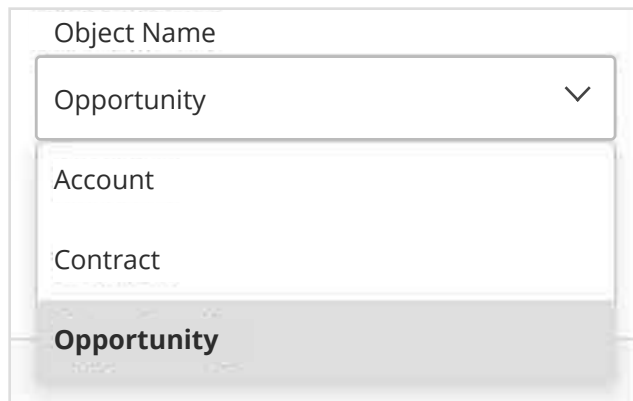
Please note: only the fields marked "sf" can be connected to Salesforce objects.



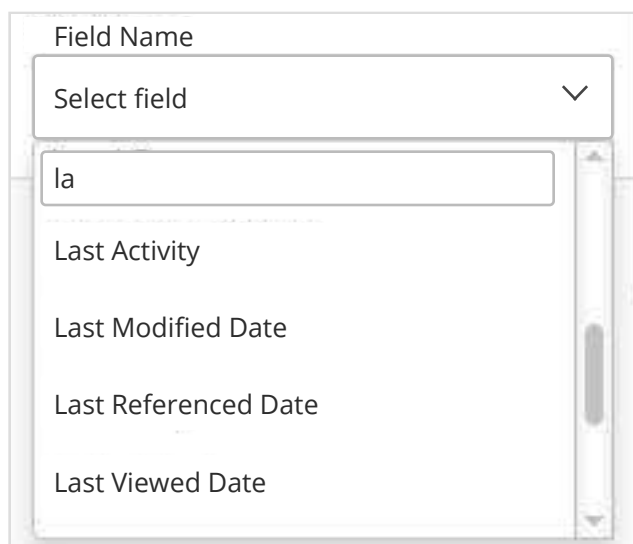
To connect a field to a Salesforce object, click on Salesforce when choosing the field source.



If you'd like a field to remain unlinked to Salesforce, choose PDFfiller. Recipients can add their own data while filling out a pre-filled document.

A screenshot of a dropdown menu titled "Object Name". The menu is open, showing a list of Salesforce objects: "Opportunity", "Account", "Contract", and "Opportunity". The "Opportunity" option at the bottom is highlighted in a dark grey color. A small downward arrow is visible in the top right corner of the dropdown box.

Choose a Salesforce object, for example Opportunity, to connect it to a fillable field by clicking on the dropdown list.

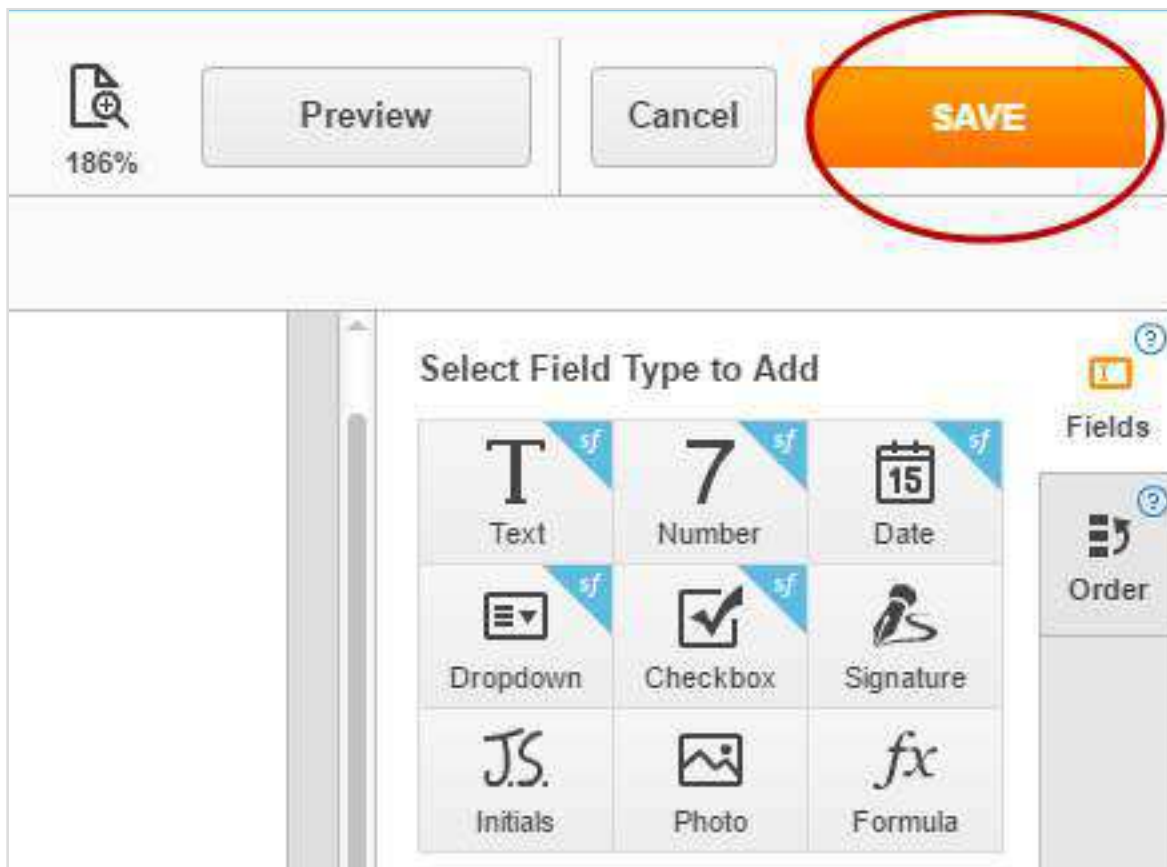
A screenshot of a dropdown menu titled "Field Name". The menu is open, showing a list of fields: "Last Activity", "Last Modified Date", "Last Referenced Date", and "Last Viewed Date". A search box at the top of the list contains the text "la". The "Last Activity" field is the first item in the list. A small downward arrow is visible in the top right corner of the dropdown box.

Start typing the first letter of a field in the designated Salesforce object, for example Name, to connect the required data.

Connect other smart fillable fields in the template to Salesforce data.

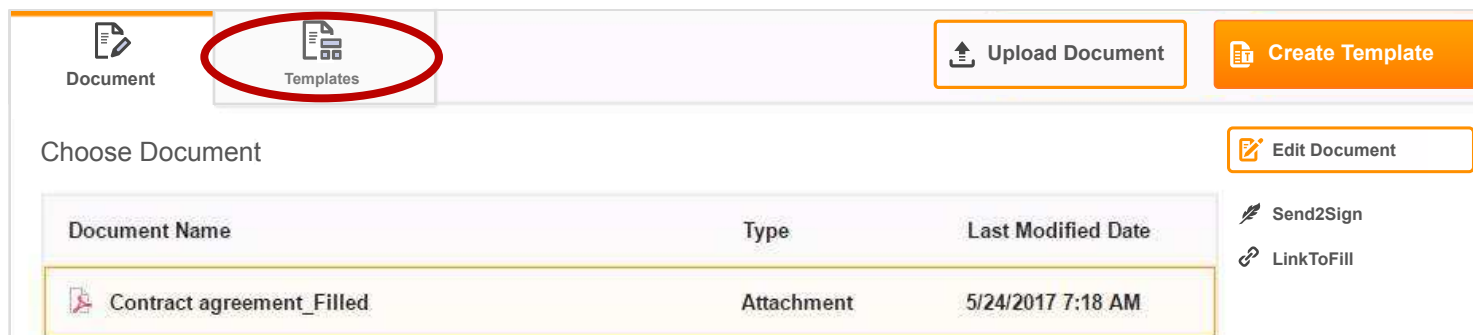
Please note: to create a template you have to connect at least one fillable field in it to a Salesforce object.

After you've added and connected all the fields to the required Salesforce objects, click the orange **Save** button.



The new template is now available in all Salesforce objects of this type for this user, such as all Opportunities.

To see the templates you've created, click the **Templates** tab in the DaDaDocs upper panel.



If you'd like to add more smart fillable fields to a template, remove existing fields or connect them to other Salesforce objects and data, click the **Edit Template** button on the right.



Document Templates Upload Document Create Template

Choose Document

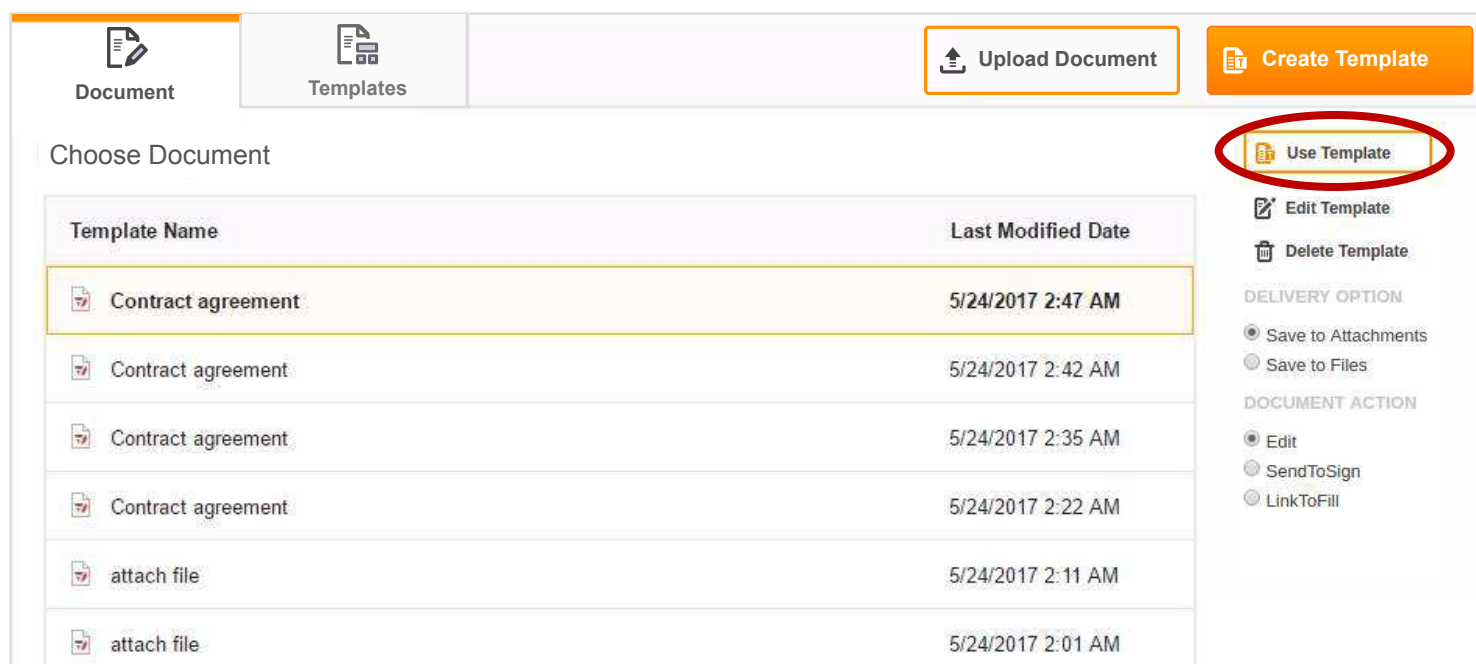
Template Name	Last Modified Date
Contract agreement	5/24/2017 2:47 AM

Use Template Edit Template Delete Template

DELIVERY OPTION

To remove a template from the list click on **Delete Template**.

Click the **Use Template** button to pre-fill a template with data from the selected Salesforce object.



Document Templates Upload Document Create Template

Choose Document

Template Name	Last Modified Date
Contract agreement	5/24/2017 2:47 AM
Contract agreement	5/24/2017 2:42 AM
Contract agreement	5/24/2017 2:35 AM
Contract agreement	5/24/2017 2:22 AM
attach file	5/24/2017 2:11 AM
attach file	5/24/2017 2:01 AM

Use Template Edit Template Delete Template

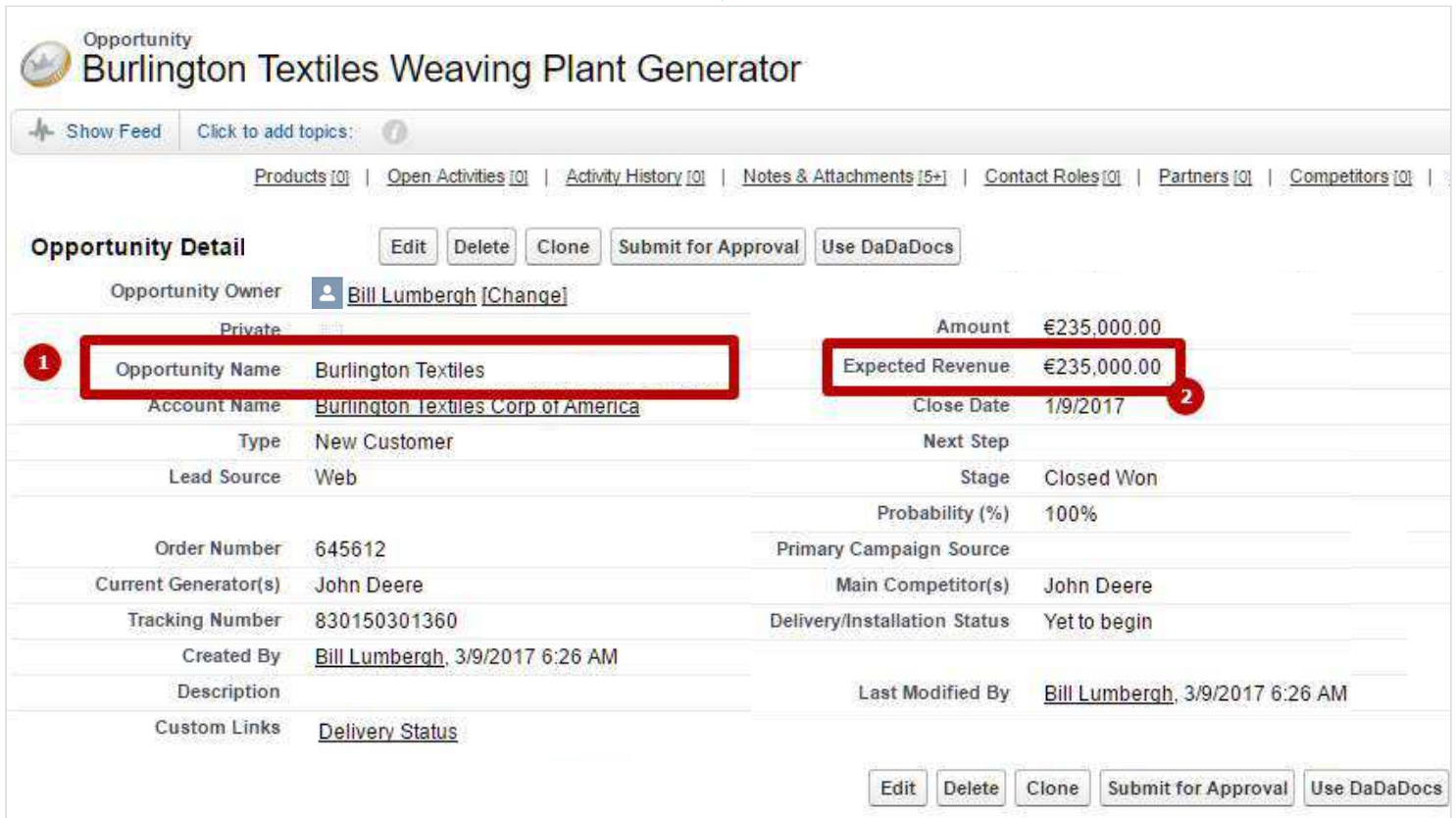
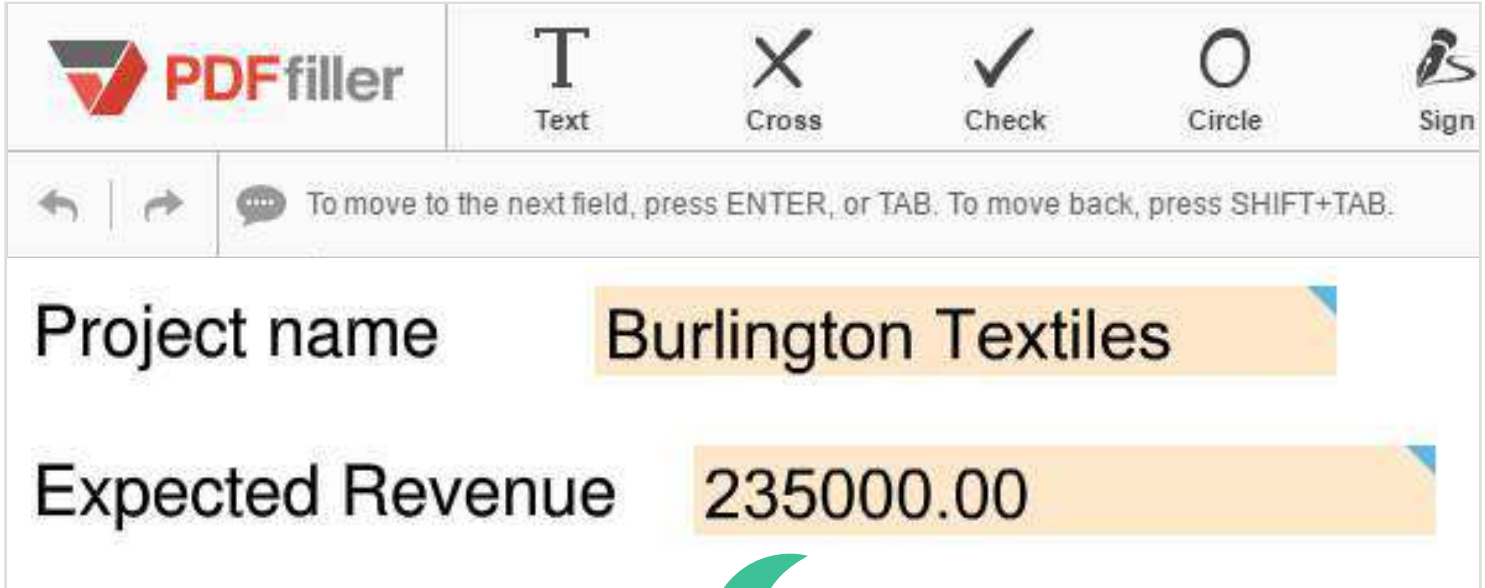
DELIVERY OPTION

- Save to Attachments
- Save to Files

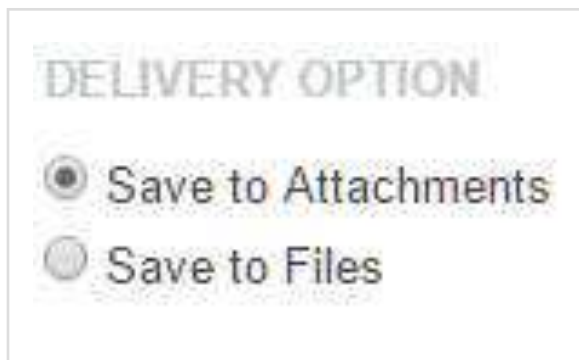
DOCUMENT ACTION

- Edit
- SendToSign
- LinkToFill

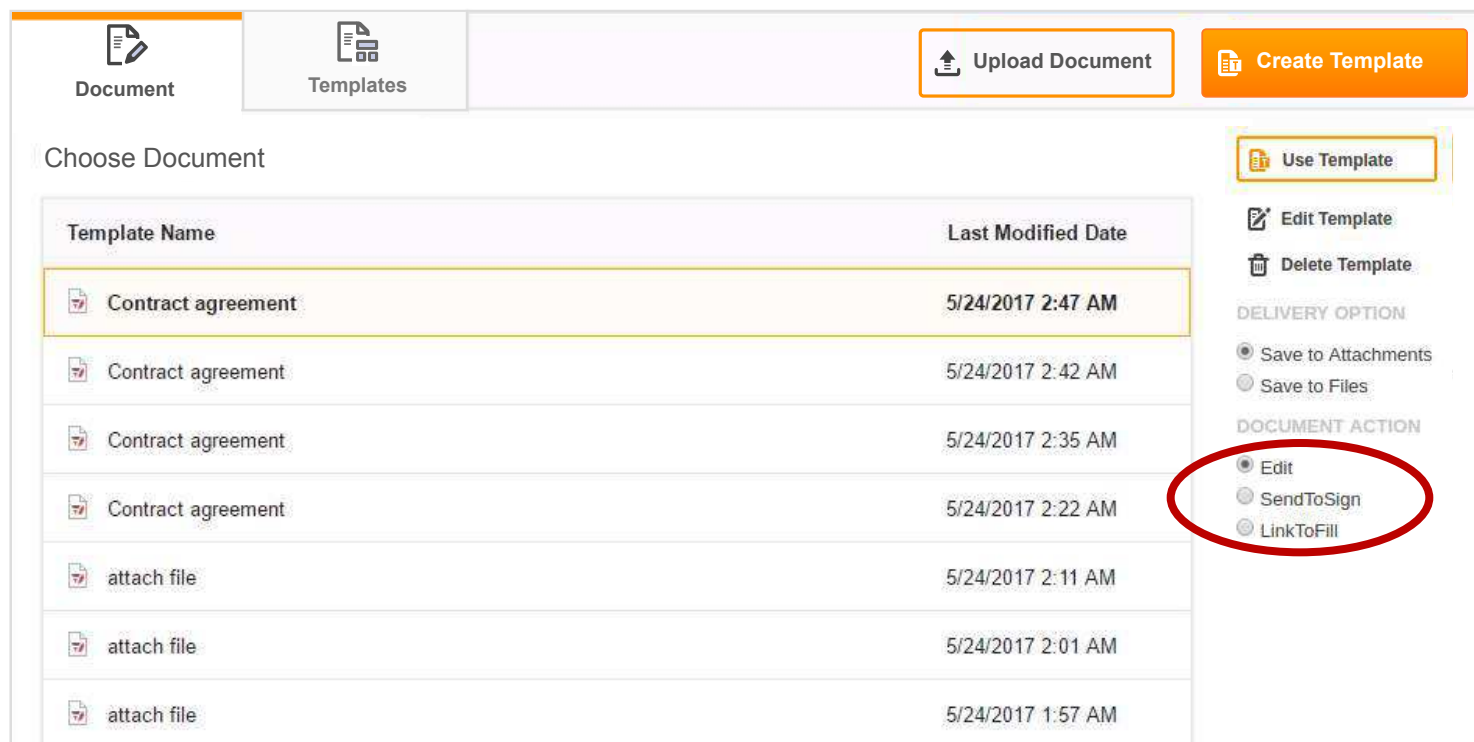
The fillable fields of the open document now contain information from the linked fields of a Salesforce object:










You can choose to save a pre-filled document as an attachment or as a file.



Now you can send a pre-filled document out for signing via a button or a link. You can also edit it right from the Templates tab.







The screenshot shows the DaDaDocs interface with the "Templates" tab selected. The "Choose Document" section displays a table of templates. The "Contract agreement" template is highlighted. On the right, the "DOCUMENT ACTION" menu is visible, with the "Edit" option circled in red.


Template Name	Last Modified Date
 Contract agreement	5/24/2017 2:47 AM
 Contract agreement	5/24/2017 2:42 AM
 Contract agreement	5/24/2017 2:35 AM
 Contract agreement	5/24/2017 2:22 AM
 attach file	5/24/2017 2:11 AM
 attach file	5/24/2017 2:01 AM
 attach file	5/24/2017 1:57 AM







DOCUMENT ACTION

- Edit
- SendToSign
- LinkToFill

A pre-filled document appears in the document list; '\_Filled' will be added to the end of the file name.

 Document  Templates  Upload Document  Create Template

Choose Document  Edit Document

Document Name	Type	Last Modified Date	 Send2Sign	 LinkToFill
 Contract agreement_Filled	Attachment	5/24/2017 7:18 AM		
 Contract agreement_Filled	Attachment	5/24/2017 6:48 AM		
 Contract agreement	File	5/24/2017 6:47 AM		
 Contract agreement_Filled	Attachment	5/24/2017 6:24 AM		