

EOTSS Adobe Sign & Salesforce Common Issues & Solutions



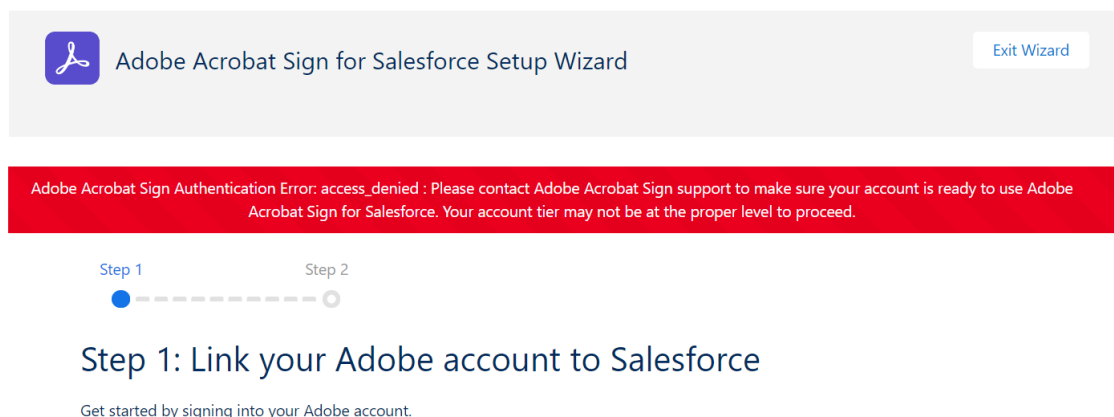
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Unable to link Salesforce to Sign using a Group Administrator

ISSUE:

Individual MA agencies that are created under the MA EOTSS Sign Account are provisioned as Groups and assigned Group Administrators. These Groups do not have access to the Account Administrator credentials to use in Integrations, so they must integrate at the Group Administrator level. This is an appropriate security control to limit the visibility and permissions available to each Group. However, several MA Agencies have experienced this Sign error when attempting to link Salesforce to Sign using a Group Administrator.



SOLUTION:


NOTE: The following solution includes updating Custom Settings within the Acrobat Sign for Salesforce environment. This guide explains this and other advanced configurations:

<https://helpx.adobe.com/ua/sign/integrations/salesforce-customization.html>

The Sign Plug-in defaults to using an Account Administrator-level user for linking. To override this function, the plug-in needs to update the OAUTH Scope setting to look in the Group domain.

Here are the steps:

1. In the **Salesforce System Administrator**, navigate to **Custom Settings** and click **Manage** next to **Adobe Sign Settings**. Click **Create/edit the default org level values**.
2. In the **Adobe Sign OAuth Scope** setting, enter **"GROUP"**. *If you don't see this setting, verify that you are using Sign plug-in version 23.14 or after.*



Setup

Home

Object Manager

Custom Code

Custom Settings

Didn't find what you're looking for?
Try using Global Search.

SETUP

Custom Settings

Methods

Override Recipient Field List	
Read Only Agreement Name	<input type="checkbox"/>
Read Only Contract	<input type="checkbox"/>
Read Only Hosted Signing	<input type="checkbox"/>
Read Only Message	<input type="checkbox"/>
Read Only Post Sign Options	<input type="checkbox"/>
Read Only Recipient Signing Order	<input type="checkbox"/>
Read Only Security Options	<input type="checkbox"/>
Read Only Sender Signs	<input type="checkbox"/>
Read Only Sign Reminder	<input type="checkbox"/>
Rename Agreement with Document Name	<input type="checkbox"/>
Show Fields API Name	<input type="checkbox"/>
Callback URL Agreement Notification	https://micahhwang1-developer-edition.na57.force.com/AdobeSignCallback
Adobe Sign OAuth Scope	GROUP

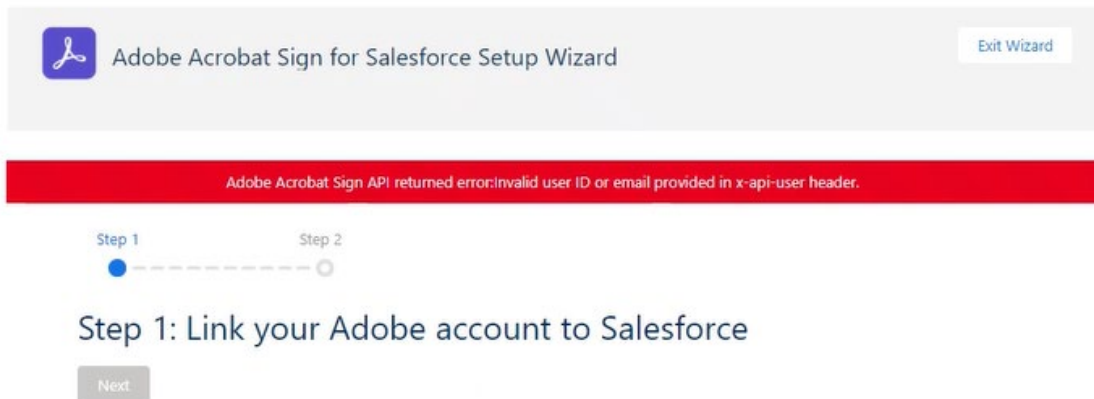
View: All [Create New View](#)

3. Navigate back to the **Adobe Sign Admin** page and retry linking your account using your Sign Group Administrator user.

Unable to link Salesforce org to the Production Sign environment

ISSUE:

MA Agencies that have been developing and testing using a Sign Developer (i.e., non-Production) environment have experienced issues when trying to link their Salesforce org to the Production Sign environment. This is related to the browser (and Salesforce) caching Test/Demo credentials and overriding the Production credentials when linking Salesforce and Sign. The following error results:



SOLUTION:

As a convenience, Salesforce and the browser cache credential information in the browser session. To avoid that information being used during linking, perform the **one-time linking** of the Salesforce and Sign Production accounts in a browser in Incognito mode. This will ensure that credentials entered in the link screen are the ones passed in the OAUTH setup.

Here are the steps:

- 1) Open a browser in incognito mode (i.e. **CTRL-SHIFT-N** in **Google Chrome**).
- 2) Manually log into Salesforce and proceed to the Sign Link screen.
- 3) Enter the credentials for the Sign Suer in the OAUTH prompt and complete the OAUTH steps.
- 4) When prompted, manually log into Salesforce with the Salesforce user credentials that match the Sign Link credentials.

External Links

<https://helpx.adobe.com/ua/sign/integrations/salesforce-customization.html>

Version

1	Initial Document	Jessica Powers