

EOTSS Adobe Sign & Salesforce Common Issues & Solutions



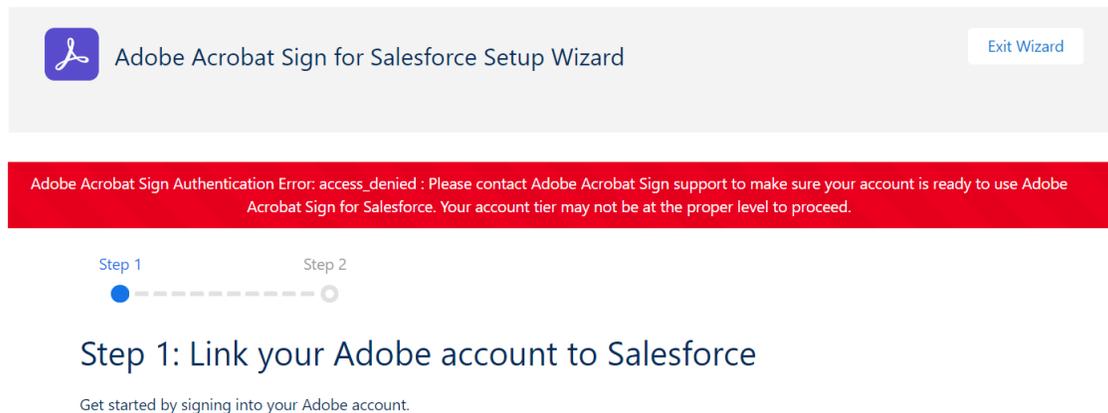
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Unable to link Salesforce to Sign using a Group Administrator

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.



The screenshot shows the 'Adobe Acrobat Sign for Salesforce Setup Wizard' interface. At the top right, there is an 'Exit Wizard' button. A prominent red error banner reads: 'Adobe Acrobat Sign Authentication Error: access_denied : Please contact Adobe Acrobat Sign support to make sure your account is ready to use Adobe Acrobat Sign for Salesforce. Your account tier may not be at the proper level to proceed.' Below the error, a progress indicator shows 'Step 1' as the active step (indicated by a blue dot) and 'Step 2' as the next step (indicated by a grey dot). The main heading for Step 1 is 'Step 1: Link your Adobe account to Salesforce', with a sub-instruction: 'Get started by signing into your Adobe account.'

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.*

The screenshot shows the Adobe Sign Admin interface. At the top left is the Adobe logo. A search bar at the top right contains the text "Search Setup". Below the logo is a navigation menu with "Setup", "Home", and "Object Manager" (with a dropdown arrow). On the left side, there is a search box containing "custom settings" and a dropdown menu with "Custom Code" and "Custom Settings" (highlighted in yellow). Below this is a message: "Didn't find what you're looking for? Try using Global Search." The main content area is titled "SETUP Custom Settings" and contains a list of settings under the "Methods" section. The settings are:

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

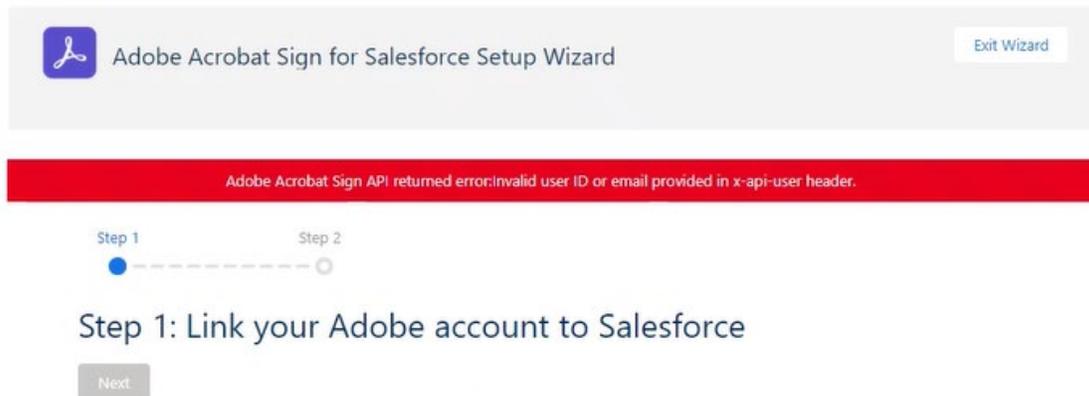
At the bottom of the settings list, there is a "View:" section with a dropdown menu set to "All" and a link "Create New View".

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