Adobe Sign Agreements Table

This table holds the Adobe Sign Agreement, which contain a link back to the Contract record from which they were created in the Linked Record field. The table also contains an embedded table of the Adobe Sign Recipients list and the Documents to Send field which holds the attached files to be reviewed/signed.

Once the Agreement has been previewed and sent, it is given an Adobe Sign Agreement ID and one of the paid Agreements.

Within the Agreement record, you can see the recipients along with other details.

Signing may be set up to happen sequentially or in parallel. It is also possible to change the default reminder frequency and deadline before the Agreement expires within the Agreement record. As each signer responds, the Signed Documents are updated with the latest version of the signed document, and an Audit Log file tracks all behavior within the system.

 The Send Reminder button is used to send a reminder email to any signer who has been notified but has not yet signed.

The Cancel Agreement button is used to cancel the signing altogether.

Sign by Sender adds the sender's signature if he/she has been identified as one of the signers.

Automation

In the Standard System Demo, the Adobe Sign Agreements table contains two rules. These rules are accessed by expanding the Adobe Sign Agreements table in the left pane, selecting Setup Adobe Sign Agreements, and then selecting the Rules tab:

- **Edit: Completion actions - convert file and update contract**: This rule uses a saved search to run whenever the Status field of an Adobe Sign Agreement record is set as completed. It uses an If-Then-Else action called "Completion actions for contracts" and updates the Status of Contract. It also runs a conversion action to create a new attachment record for the signed documents.
- **Edit: When status changes to Sent, update linked contract, if any:** This rule uses a saved search to run whenever the Status field of an Adobe Sign Agreement record is set as Sent**.** It uses a linked record action to change the related contract record's status as Pending Signature.

Ownership

Adobe Sign Agreement records are owned by the sender of the Agreement. Adobe Sign Agreements records are owned by the user whose Login matches the Sender Login field.