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iDIN

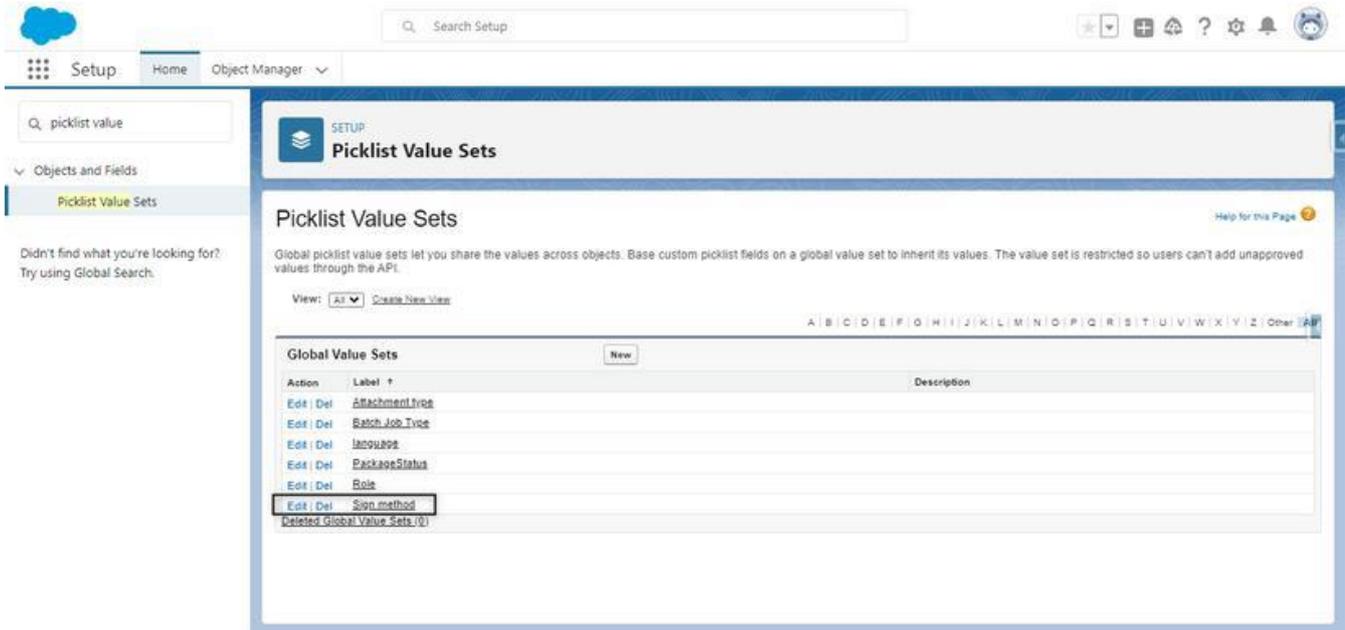
DOCUMENTATION



PREREQUISITE

a. Add iDIN as a picklist value on the Global Picklist of Signing method

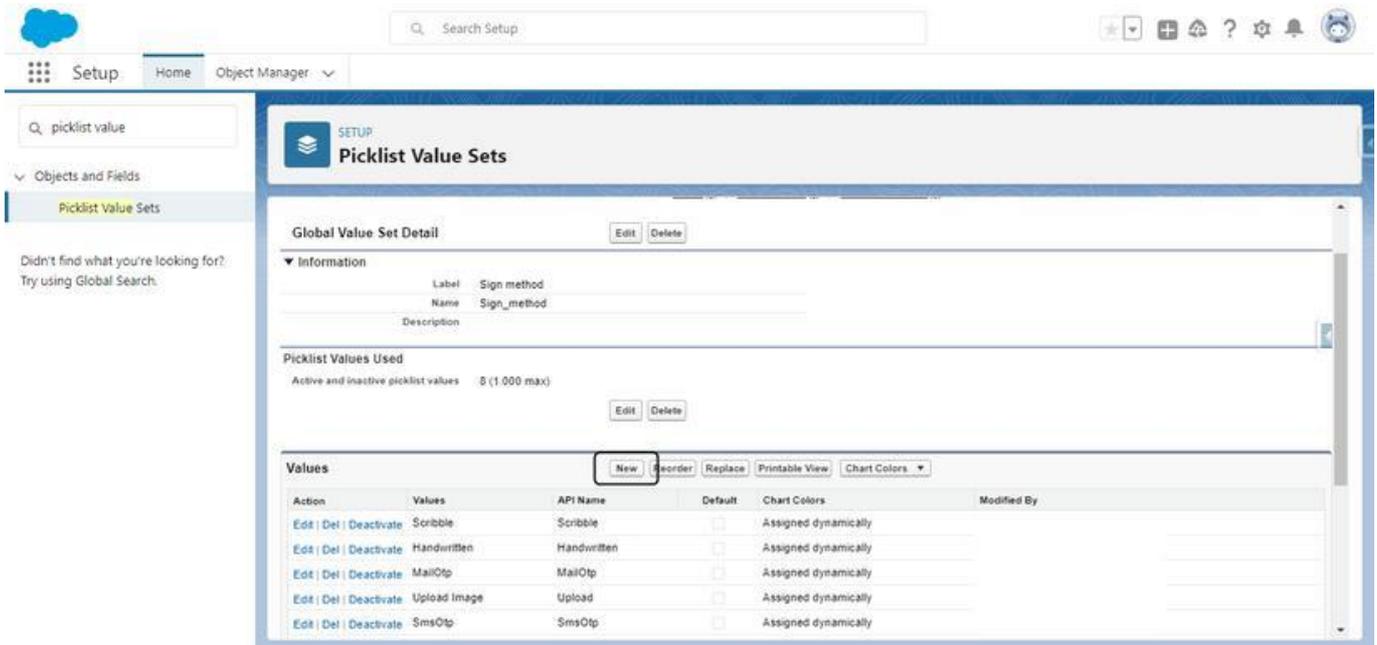
1. Click Setup
2. In the Quick Find search box, populate 'picklist value' and select 'Picklist Value Sets'
3. Select 'Signing method'



The screenshot shows the Salesforce Setup interface for 'Picklist Value Sets'. The search bar contains 'picklist value'. The left sidebar shows 'Picklist Value Sets' selected under 'Objects and Fields'. The main content area displays a list of 'Global Value Sets' with columns for 'Action', 'Label', and 'Description'. The 'Sign method' entry is highlighted with a red box. Below the list, there is a 'Deleted Global Value Sets (0)' section.

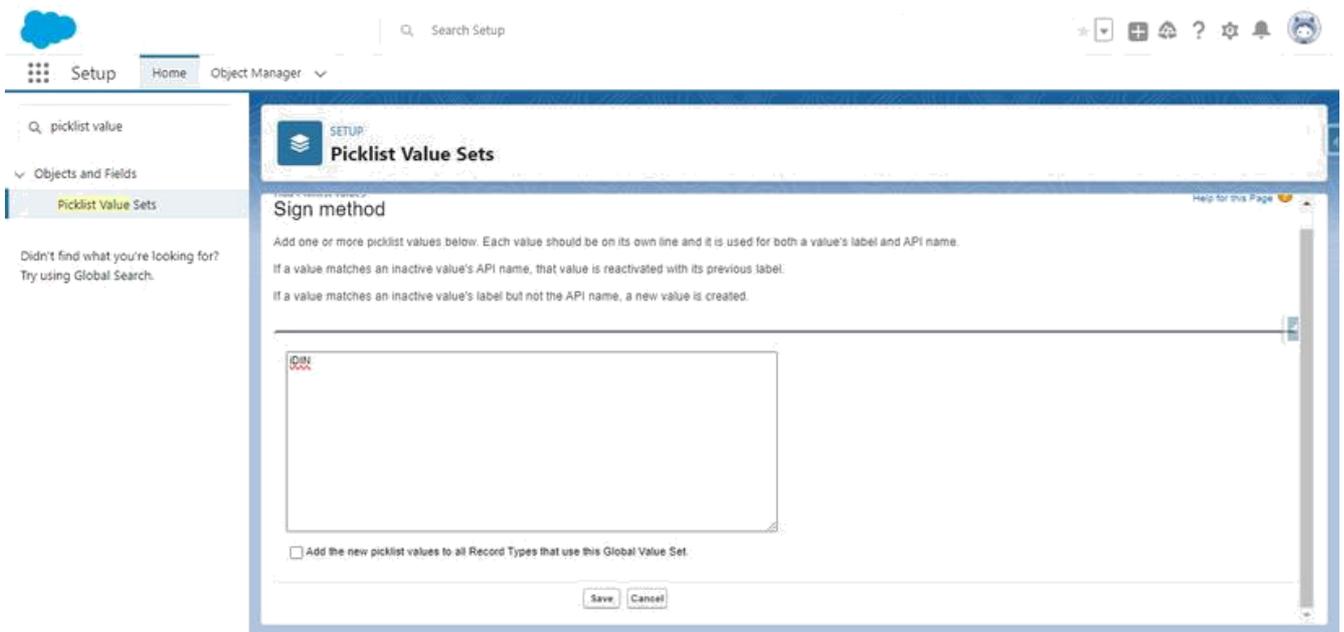
Action	Label	Description
Edit Del	Attachment Type	
Edit Del	Batch Job Type	
Edit Del	Language	
Edit Del	Package Status	
Edit Del	Role	
Edit Del	Sign method	

4. On the Value section, click the New button and populate "iDIN" as a new picklist value

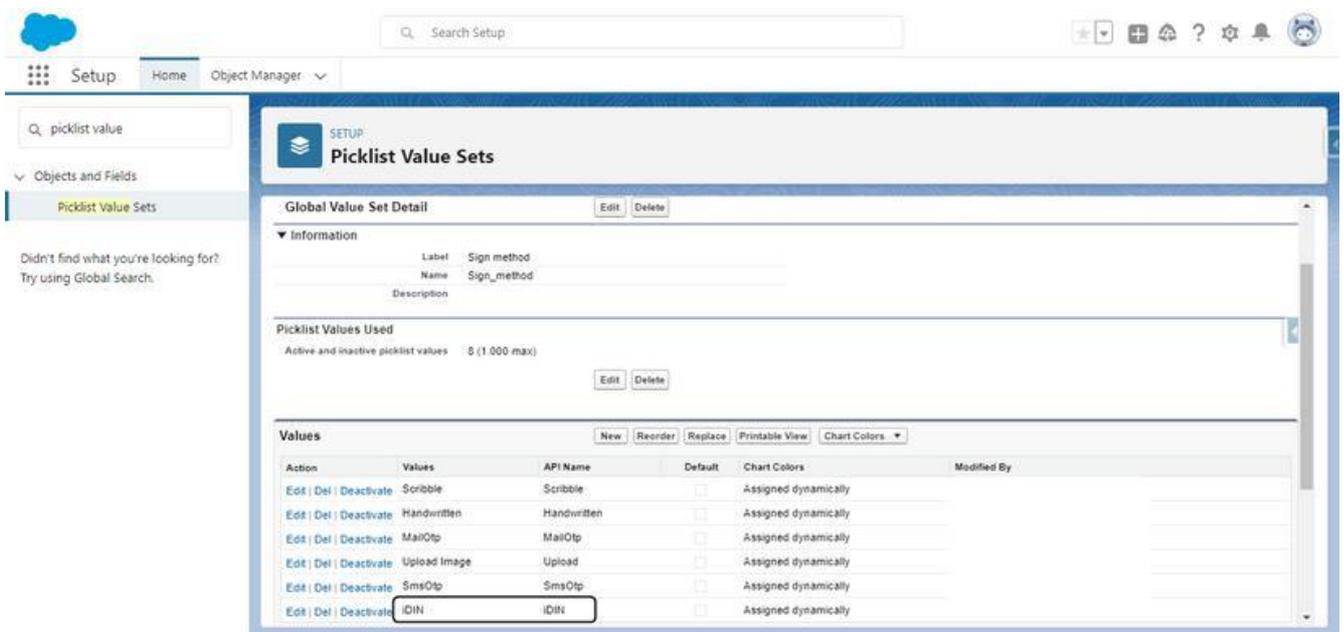


The screenshot shows the 'Global Value Set Detail' view for the 'Sign method' picklist. The 'Information' section shows the label and name as 'Sign method'. The 'Picklist Values Used' section shows 8 active and inactive picklist values. The 'Values' section is expanded, showing a table of picklist values with columns for 'Action', 'Values', 'API Name', 'Default', 'Chart Colors', and 'Modified By'. The 'New' button is highlighted with a red box.

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Scribble	Scribble	<input type="checkbox"/>	Assigned dynamically	
Edit Del Deactivate	Handwritten	Handwritten	<input type="checkbox"/>	Assigned dynamically	
Edit Del Deactivate	MailOtp	MailOtp	<input type="checkbox"/>	Assigned dynamically	
Edit Del Deactivate	Upload Image	Upload	<input type="checkbox"/>	Assigned dynamically	
Edit Del Deactivate	SmsOtp	SmsOtp	<input type="checkbox"/>	Assigned dynamically	



5. Tick 'Add the new picklist values to all Record Types that use this Global Value Set.' checkbox and click the Save button



6. To validate that the 'iDIN' picklist value is successfully added, navigate to Object Manager > Stakeholder and select the 'Sign method' field

This screenshot shows the Salesforce Object Manager interface for the 'Stakeholder' object. The breadcrumb navigation is 'Setup > Object Manager'. The page title is 'Object Manager' with a search bar containing 'stakeholder' and buttons for 'Schema Builder' and 'Create'. Below the header is a table with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Stakeholder	Stakeholder__c	Custom Object		8/07/2021	✓

This screenshot shows the 'Fields & Relationships' section for the 'Stakeholder' object. The breadcrumb navigation is 'Setup > OBJECT MANAGER > Stakeholder'. The page title is 'Stakeholder' with a search bar containing 'Sign method' and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. A table lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Sign method	Sign_method__c	Picklist (Multi-Select)		

This screenshot shows the 'Values' section for the 'Sign method' field. The breadcrumb navigation is 'Setup > OBJECT MANAGER > Stakeholder'. The page title is 'Stakeholder'. The 'Restrict picklist to the values defined in the value set' checkbox is checked. Below this, there are sections for 'Picklist Values Used', 'Validation Rules', and 'Values'. The 'Values' section contains a table with the following data:

Values	API Name	Default	Modified By
Scribble	Scribble	<input type="checkbox"/>	
Handwritten	Handwritten	<input type="checkbox"/>	
MailOtp	MailOtp	<input type="checkbox"/>	
Upload Image	Upload	<input type="checkbox"/>	
SmsOtp	SmsOtp	<input type="checkbox"/>	
iDIN	iDIN	<input type="checkbox"/>	

Note: Once iDIN is successfully added as a picklist value on the Stakeholder.Sign_method__c , you can now add iDIN as a signing method on a Sign request template.

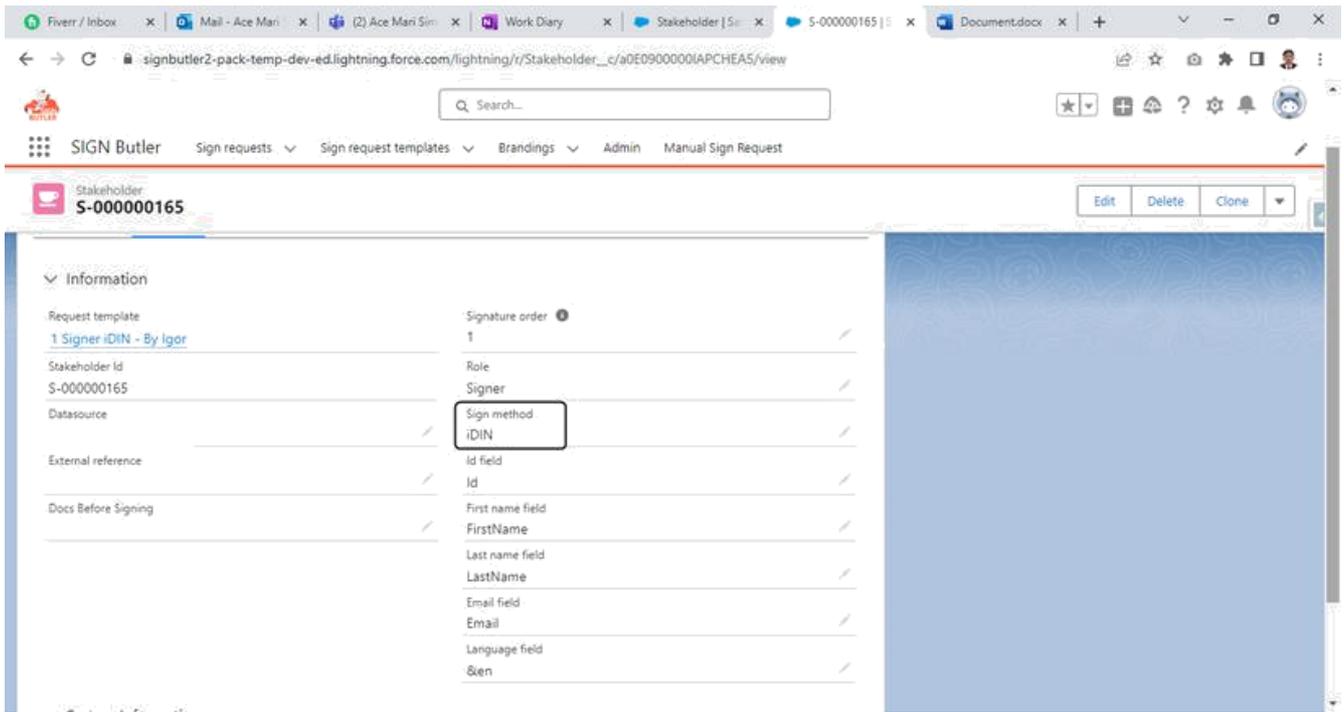
b. Add iDIN as a signing method on a Sign Request Template

1. On the App Menu, select SIGN Butler > Sign request template
2. Click New and populate the required fields
3. Click Next
4. On the Stakeholder screen, select a Signer = Role and tick 'iDIN' on the Signature methods

The screenshot shows the 'SIGN Butler' interface for creating a new sign request template. The 'Signature methods' section is expanded, and the 'iDIN' checkbox is checked. Below this, there are several required fields: 'Data source' (a dropdown menu), 'Id' (a dropdown menu), 'First name' (a dropdown menu), 'Last name' (a dropdown menu), 'Email' (a dropdown menu), and 'Language' (a dropdown menu). The interface includes a search bar at the top and a navigation menu with options like 'Sign requests', 'Sign request templates', 'Brandings', 'Admin', and 'Manual Sign Request'.

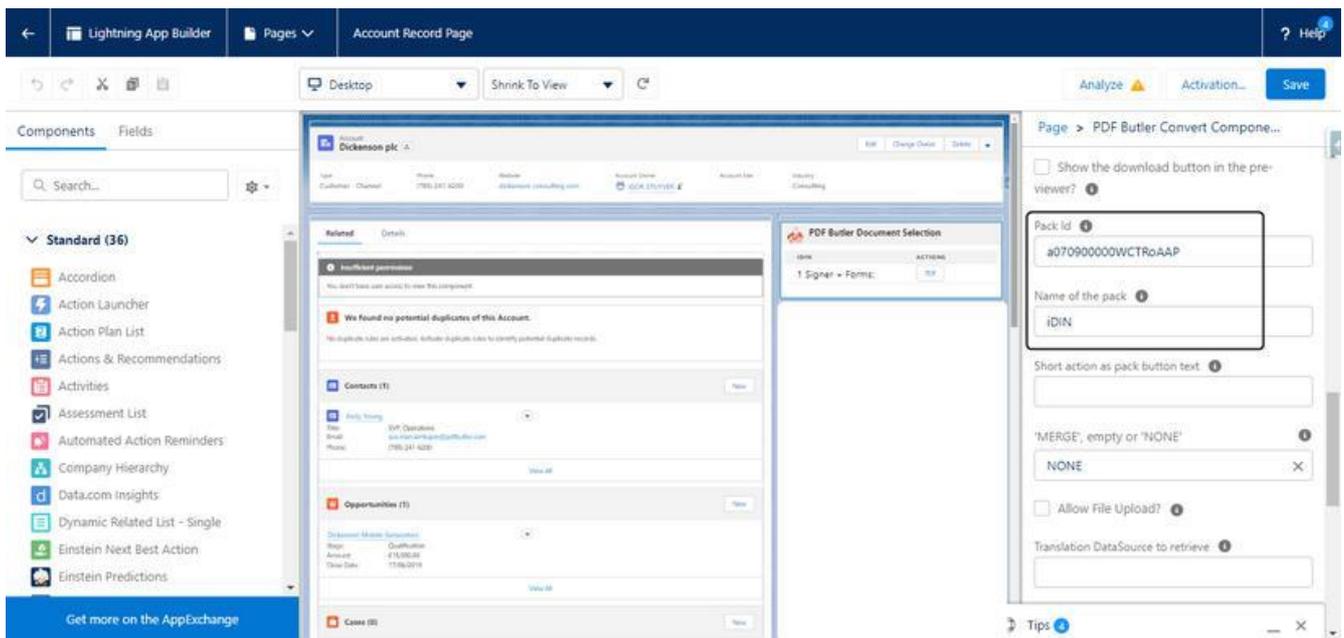
4. Populate required fields and select Add and Next
5. Select an option for the file mapping and Click Submit.
6. To validate that 'iDIN' is successfully selected as a Signature methods, navigate to the Sign request template record and select a related Stakeholder

The screenshot shows the record view for a sign request template named '1 Signer iDIN - By Igor'. The 'Details' section is expanded to show 'Information'. The 'Stakeholders' section shows a list of related records, with one record highlighted. This record has the following details: 'Signature order: 1', 'Sign method: iDIN', and 'Role: Signer'. The interface includes a search bar at the top and a navigation menu with options like 'Sign requests', 'Sign request templates', 'Brandings', 'Admin', and 'Manual Sign Request'.



7. You can also edit directly a Sign request template to include iDIN as a Signature method

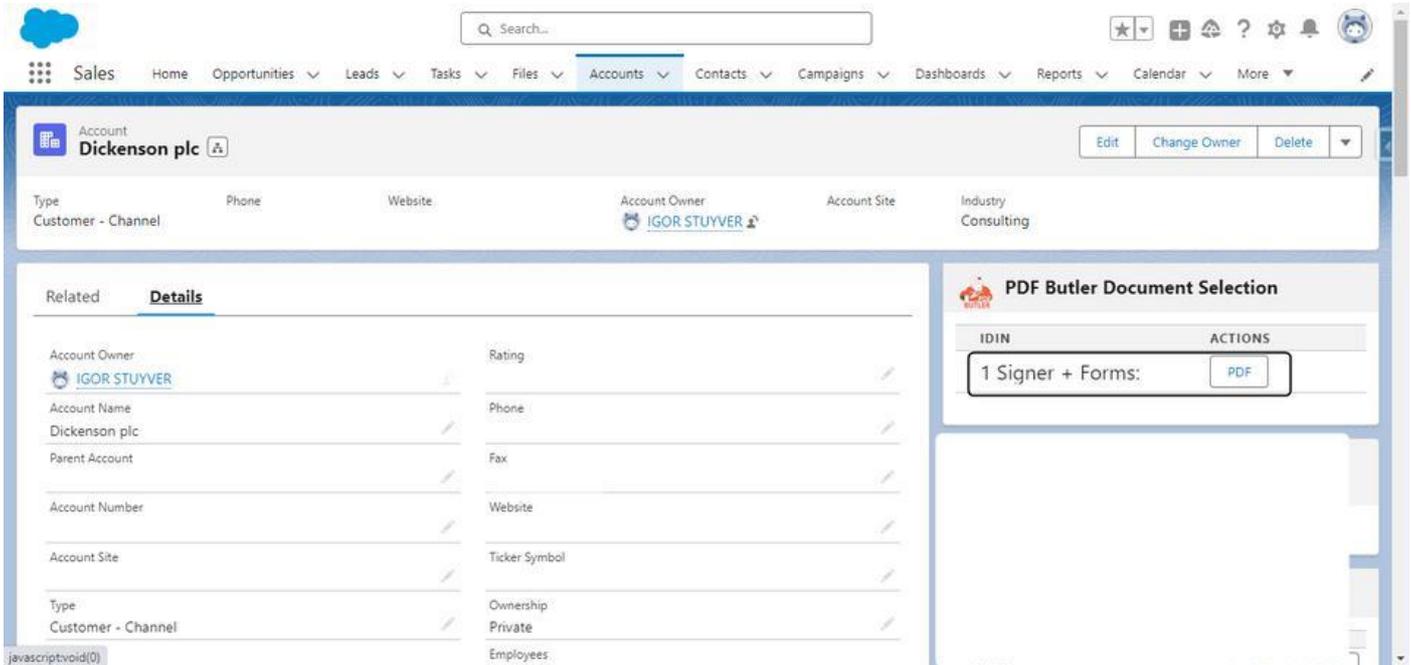
Note: If a new Signing request template is created, make sure to add the Id of the Pack on PDF Butler Component.



INSTRUCTION

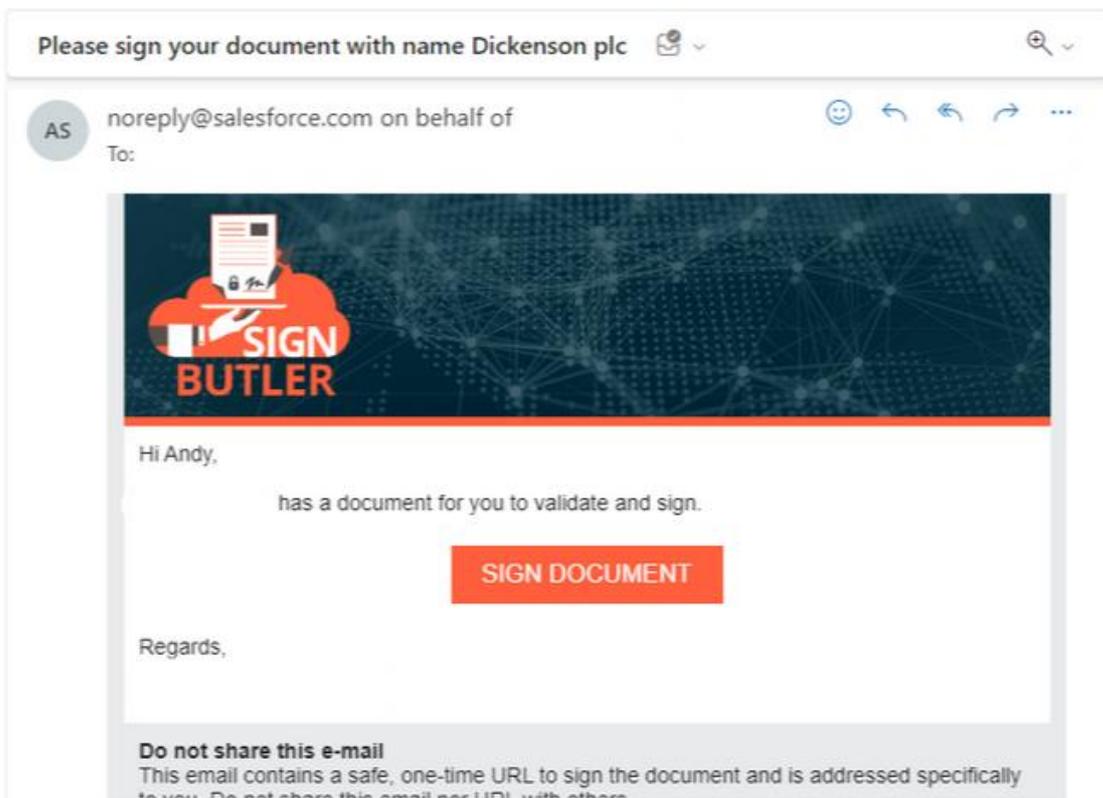
a. Use Case Scenario in using iDIN as a Signature Method

1. On the Salesforce Record where the PDF Butler and Sign Butler are configured, action the document.



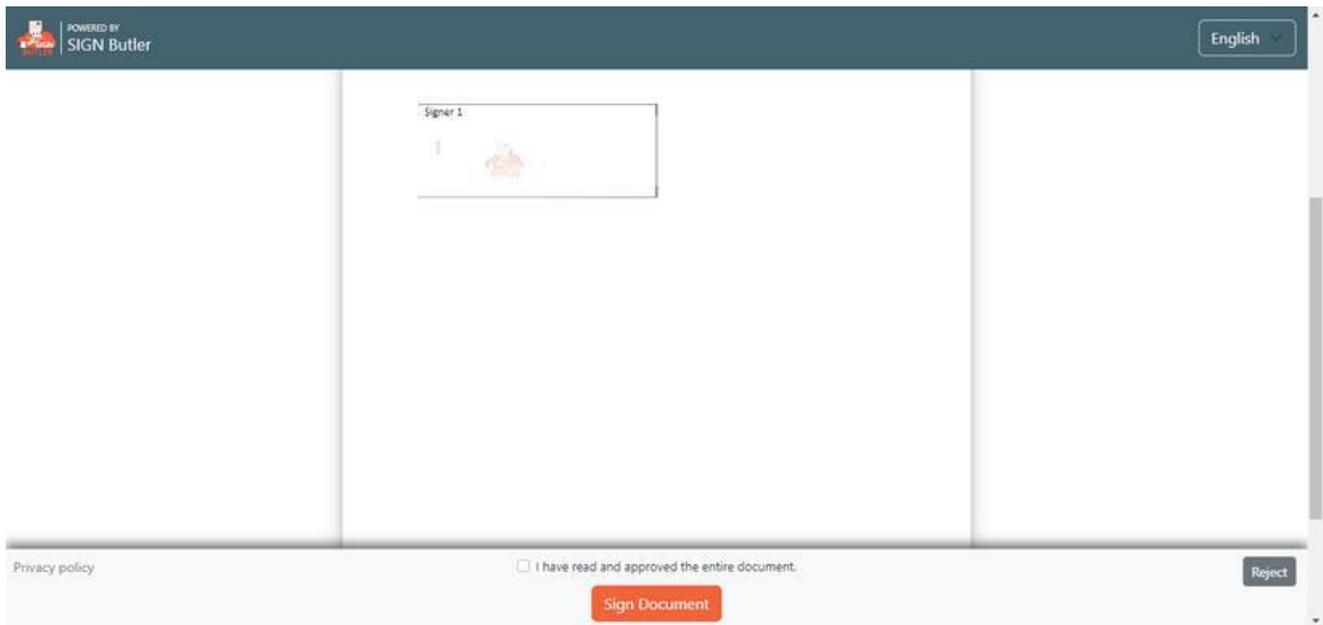
The screenshot shows the Salesforce interface for the account 'Dickenson plc'. The 'Details' tab is selected, displaying various fields such as Account Owner (IGOR STUYVER), Account Name (Dickenson plc), and Type (Customer - Channel). A sidebar titled 'PDF Butler Document Selection' is open on the right, showing '1 Signer + Forms:' and a 'PDF' button.

2. Once it is successfully actioned, the recipient will receive an email on the document that they need to sign.



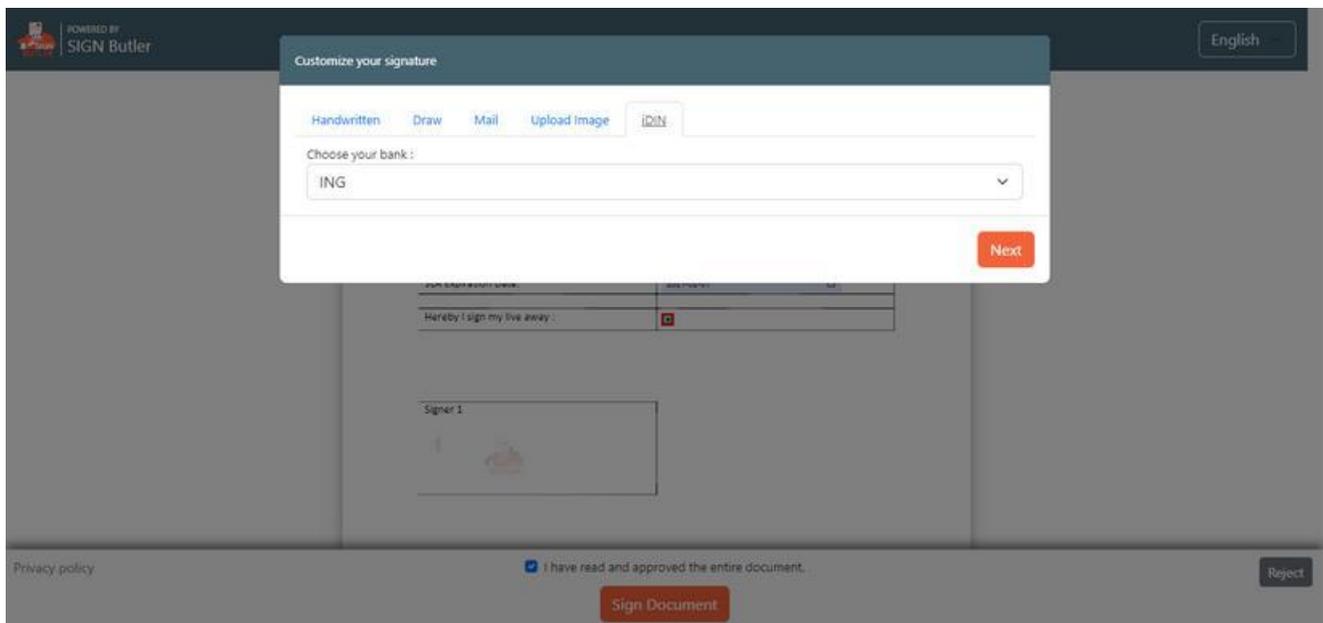
The screenshot shows an email notification from noreply@salesforce.com. The subject is 'Please sign your document with name Dickenson plc'. The body contains a 'SIGN BUTLER' logo, a greeting 'Hi Andy,', and a message stating 'has a document for you to validate and sign.' with a prominent 'SIGN DOCUMENT' button.

3. Click Sign Document and it will be routed to the document page.



4. Tick 'I have read and approved the entire document' checkbox and click Sign Document.

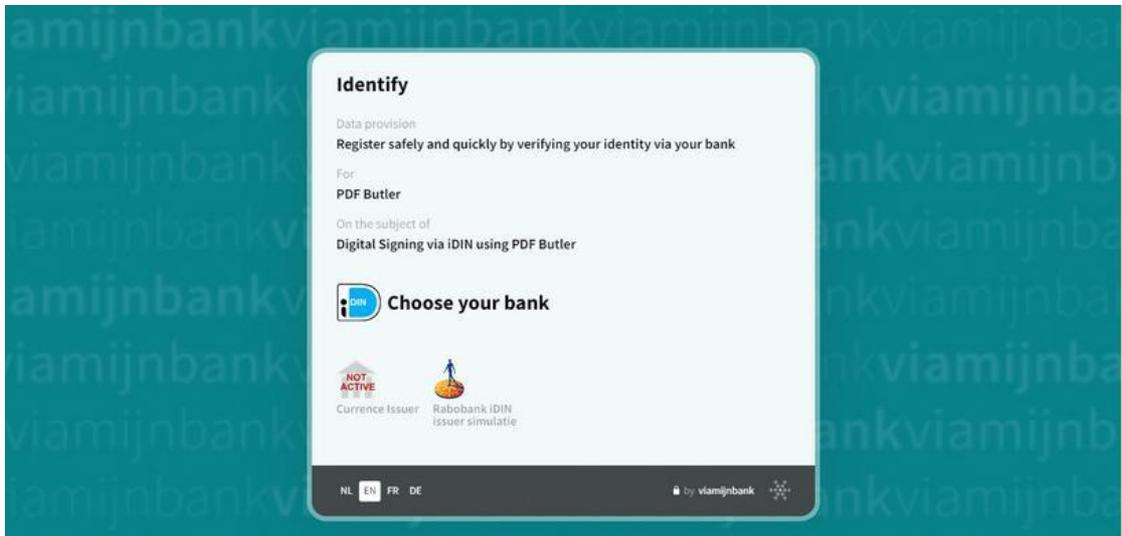
5. 'Customize your signature' modal will pop up and select iDIN as your signature method.



6. Select a Bank to complete the signing using iDIN and click Next.

The signer will be forwarded to their bank login and after successful login will be redirected to SIGN Butler

7. On a Sandbox or Salesforce Developer Org (this is in a TEST process), the iDIN process will automatically authenticate, so no popup will show and behind the scenes, the redirect to step 8 is done directly and is done always with person called "VJ De Vries". That test process we cannot change. Also in TEST, when you do not select the "Rabobank", following screen will show to select the bank for authentication.



In PROD, you will be forwarded to the Bank that you have selected in the dropdown (step 5).

8. Once completed the bank verification, the Document Signed modal will pop up and the recipient will receive an email (depending on the config in SIGN Butler) with the signed document.

