

SETUP GUIDE

True Autograph *for Salesforce*

Send documents for signature from Salesforce records. Every step lands on the record's activity timeline as it happens, and the signed PDF and the answers you choose are saved to the record when everyone has signed.

PLANS

Every plan, Starter included

SETUP TIME

About 15 minutes

UPDATED

September 27, 2026

THE STEPS

1. Connect Salesforce from True Autograph
2. Install the True Autograph package
3. Give people access
4. Add the panel to your record pages
5. Choose which answers are saved to Salesforce fields (optional)

What you get

- A **True Autograph** panel on Account, Contact, Lead, and Opportunity pages. Pick a template and send. On Contacts and Leads the first signer is filled in from the record, and on Opportunities from the primary contact.
- Every request sent from the record, with a progress bar, who it is waiting on, and each signer's step, in plain words such as "Out for signature" and "Opened".
- **Remind** and **Void** right from the panel.
- Each step on the record's activity timeline as a completed task, in real time: sent, opened, each reminder, signed, declined (with the reason), completed, voided, and expired.
- The signed PDF saved to the record's Files when everyone has signed, titled for example "Signed - Services Agreement". The panel shows when it has landed.
- Answers you choose saved to fields on the record, such as a policy number, a start date, or a checkbox the signer ticked. You choose them from lists in True Autograph; there are no API names to type.

- A True Autograph Requests related list for Accounts, Contacts, Leads, and Opportunities.
- No API key to copy, no code to deploy, and no scheduled job to keep running. True Autograph does the work in Salesforce itself.

What you need

- A True Autograph workspace on any plan, and a True Autograph admin to connect Salesforce.
- A Salesforce org with Lightning Experience: Enterprise, Unlimited, Performance, or Developer Edition, or a sandbox of one of these.
- A Salesforce admin who can install packages. True Autograph saves tasks, files, and answers as the Salesforce user who connects, so an integration user is a good choice.

Setting it up

1 Connect Salesforce from True Autograph

1. Sign in to True Autograph as an admin and open **Settings**.
2. Under **Integrations**, find **Salesforce** and click **Connect Salesforce**. For a sandbox, click **Connecting a sandbox?** instead.
3. Sign in to Salesforce as the user True Autograph should work as, and click **Allow**.
4. You come back to True Autograph Settings, and the Salesforce card says **Connected to** your org.

True Autograph asks Salesforce for API access (to create tasks, save files, write the answers you map, and keep request records current), for access at any time (so updates arrive while nobody is signed in), and for your identity (to name the connected user).

If Salesforce says the app is blocked, your org only allows apps that are already installed. Install the package first (next step; the card has the link), then click **Connect Salesforce** again.

One Salesforce org connects to one True Autograph workspace.

2 Install the True Autograph package

1. On the Salesforce card, click **Open the install page**.
2. Choose **Install for Admins Only** and click **Install**. If Salesforce asks, approve access to trueautograph.com.

3. When the install finishes, come back to True Autograph and click **Finish setup**. The card shows a check mark when the panel is ready to send.

Finish setup gives the panel its own key, straight from True Autograph to Salesforce. Nobody sees it or copies it. Click it again at any time to replace the key.

3 Give people access

- Assign the **True Autograph User** permission set to everyone who sends. In Salesforce Setup, open **Permission Sets**, choose **True Autograph User**, click **Manage Assignments**, and add them.
- If the user you connected with is not a system administrator, assign them **True Autograph Integration** as well. It lets True Autograph keep request records current and set up the panel.

The connected user also needs to be able to edit the records and fields you map answers to, and to create tasks and files on them. A system administrator can already.

4 Add the panel to your record pages

1. In Salesforce, open any Opportunity and choose **Edit Page** from the gear menu.
2. Drag **True Autograph** from the list of components onto the page. The right-hand column works well.
3. Click **Save**, then **Activate**, and assign it as the org default.
4. Repeat for Accounts, Contacts, and Leads.

Optional: add the **True Autograph Requests** related list to each page layout to see every request in one list.

5 Choose which answers are saved to Salesforce fields (optional)

Nothing is written to your fields unless you choose it. Map details the record does not already have: reference numbers the sender enters, dates or titles the signer fills in, and checkboxes the signer ticks. Create a custom field for each one, such as "Policy Number" on Opportunities, rather than reusing a standard field.

1. In True Autograph **Settings**, on the Salesforce card, click **Choose which answers are saved to Salesforce fields**.
2. Pick a template, then **Opportunities**, **Accounts**, **Contacts**, or **Leads**.
3. For each answer, choose a Salesforce field, or leave it on **Not saved to Salesforce**. Only fields that can take that kind of answer are offered, and fields with matching names are suggested.
4. Click **Save**. Only admins can change these; everyone else can look.

Salesforce field type	What is saved
Checkbox	"Yes" checks it and "No" unchecks it.
Date, Date/Time	A date such as 2026-09-25 or 09/25/2026. Date/Time fields get midnight in your org's time zone.
Number, Currency, Percent	The number, with currency symbols, commas, and percent signs removed, rounded to the field's decimal places.
Picklist, Multi-Select Picklist	The choice whose value or label matches the answer. An answer that matches no choice is not saved.
Text, Text Area, Email, Phone, URL	The answer as typed, cut to the field's length.

- Answers are saved to the record the request was sent from.
- A blank answer never clears a field.
- If Salesforce refuses one value, for example because of a validation rule, the other answers are still saved.
- Answers are saved once, when the request completes, so later edits to the record are never overwritten.
- The "signed by everyone" task on the record lists what was saved, and what was not and why.

Using it

Sending for signature

On a record, click **Send for signature** in the True Autograph panel. Choose a template (if you have only one, it is already chosen). The first signer is filled in from the record; add anyone else, and fill in any details the template asks you for. Delivery uses the template's settings; click **Change** to adjust when it expires or how reminders go out. Click **Send for signature**.

You are the sender, so you get the notices if a signer declines or the request expires. Signers get an email with a private link and never need a Salesforce or True Autograph account.

Following a request

The panel lists every request sent from the record, newest first, with a progress bar and who it is waiting on. Click **Show signers** for each person's step. The record's activity timeline gets a task for each step, dated when it happened, for example "Services Agreement was sent to Ms. Rose Gonzalez for signature on Sep 25, 2026."

Request status	Meaning
Out for signature	Sent and waiting on at least one signer.
Completed	Everyone signed. "Signed PDF saved" shows once the PDF and any mapped answers are on the record, usually within seconds.
Declined	A signer declined. The reason is on the panel and the timeline.
Voided	The sender canceled the request.
Expired	The request ran out of time before everyone signed.

Reminding and voiding

Open the menu on a request that is out for signature. **Remind signers** emails whoever is signing now; their link still works. You can remind once an hour. **Void request** asks for an optional reason, stops the signing link, and tells everyone who was already emailed.

Disconnecting

In True Autograph **Settings**, on the Salesforce card, click **Disconnect**. True Autograph gives up its access to Salesforce, and the panel stops working there. Tasks, files, and answers already saved stay on the records. To remove everything, uninstall the package in Salesforce Setup, under **Installed Packages**.

Troubleshooting

What you see	What to do
The panel says "True Autograph is not connected yet"	A True Autograph admin connects the org (step 1) and clicks Finish setup (step 2).
"True Autograph is not set up for you yet"	Assign the user the True Autograph User permission set (step 3). If they have it, a True Autograph admin clicks Finish setup again.
Salesforce says the app is blocked when connecting	Install the package first, from the link on the Salesforce card, then click Connect Salesforce again.
Finish setup says the package is not installed yet	Install it from the link on the Salesforce card, wait for the email saying the install is done, then click Finish setup.

What you see	What to do
Finish setup says the connected user cannot finish setup	Assign that user the True Autograph Integration permission set (step 3), then click Finish setup.
The panel or Settings asks you to connect Salesforce again	The connected user was deactivated, or its access was revoked. Click Connect Salesforce again. Nothing is lost: waiting updates are saved once it is connected.
A field is missing from the list on the fields screen	Only fields that can take that kind of answer are offered, and read-only or formula fields never are. Check the field's type, or create a new one.
An answer was not saved	Open the "signed by everyone" task on the record. It lists each answer that was not saved and why, for example "does not match any choice in this Salesforce field".
A completed request says "Signed PDF not attached"	It was completed before True Autograph could rebuild signed copies. The signers have their copy by email.
"Already connected to another workspace"	Each Salesforce org connects to one workspace. Disconnect it in the other workspace first.
A message about the monthly allowance when sending	The workspace has used its envelopes for the month. Requests sent from Salesforce count like any other.

The online version of this guide is at www.trueautograph.com/help/salesforce, with answers to common questions at www.trueautograph.com/help. Need a hand? Email brez@phlogistoncloud.com and we will set it up with you.