CloudCrossing BVBA BE0676.494.529 Dahlialaan 1 Belgium



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'

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

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

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

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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

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- 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

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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.

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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.

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

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noreply@sal To:	esforce.com on behalf of	© ~	< → ·
BU	SIGN/ TLER		
Hi Andy,	has a document for you to validate and sign		
	SIGN DOCUMENT		
Regards,			

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

ADMERED BY SIGN Butler		English -
	Signer 1	
Privacy policy	I have read and approved the entire document. Sign Document:	Reject

- 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.

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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.

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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.

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