

PropperSign

Salesforce Agreement Workflows

Agreement Workflow Configuration

New ProperDocs Agreement Workflow

* Name

Master Service Agreement

Description

Sends the approved MSA to the customer

* Template

Master Services Agreement.pdf

* Delivery Method

Send

Email Configuration

* Email Subject

Review and Sign the ProperDocs Master Service Agreement

* Email Message

If you have any questions or concerns, please email legal@properdocs.com

Cancel

Save

- Seamlessly integrate your ProperSign templates into Salesforce.
- Choose your delivery method:
 - **Send:** Instantly send agreements directly to your customers.
 - **Draft:** Create draft agreements for review and editing before sending.
- Personalize your emails with custom subjects and messages.
- Agreements will feature your Account's custom branding.

Manage All ProperDocs Agreement Workflows



ProperDocs Agreement Workflows

+ New Workflow

Name	Description	Delivery Method		
Master Service Agreement	MSA	Send	Configure	▼
Sales Contract	Send the detailed Sales Contract to be signed	Draft	Configure	▼
Welcome Information	Send the Product welcome information	Send	Configure	▼

PropperDocs Agreement Workflow Settings

PropperDocs Agreement Workflow Settings

[View Template](#)

Template Details

Name: Master Services Agreement

Participants

Customer

SIGNER

Participant Name

{{SELECT Name FROM Contact}}

Participant Email

{{SELECT Email FROM Contact}}

PropperDocs Legal

SIGNER

Participant Name

PropperDocs Legal

Participant Email


legal@propperdocs.com

Cancel

Save

- Dynamically populate customer data in your agreements directly from Salesforce using SOQL.
- Use static data for consistent participant information when details remain the same.

Link Agreement Workflows to Salesforce Process

 **Link PropperDocs Agreement Workflow to Salesforce**

Object Type

Opportunity

Phase

Prospecting

Selecting a phase allows you to assign different workflows for different phases of the Opportunity.

Available Workflows

Master Service Agreement

Sales Contract

Selected Workflows

Welcome Information

▶

◀

Save Configuration

- Easily connect different agreement workflows to any Salesforce object or state.

Send New Agreements

The screenshot displays the Salesforce Lightning Web Component for the 'Edge Communications' account. The header bar includes the account name, a '+ Follow' button, and links for 'New Contact', 'New Case', and 'New Note'. Below the header, account details are listed: Type (Customer - Direct), Phone ((512) 757-6000), Website (http://edgecomm.com), Account Owner (Greg Alger), Account Site, and Industry (Electronics). The main content area is divided into two sections. The left section, titled 'Related', shows a message 'We found no potential duplicates of this Account.' and a 'Contacts (2)' list with buttons for 'New' and 'View All'. The right section, titled 'PropperDocs Agreement', shows a message 'No Agreement has ben sent yet.' and a 'Create New Agreement' button. At the bottom, there is an 'Activity' section with a 'Chatter' tab and a row of icons for various Salesforce features.

Account
Edge Communications

Type Customer - Direct Phone (512) 757-6000 Website http://edgecomm.com Account Owner Greg Alger Account Site Industry Electronics

Related Details

We found no potential duplicates of this Account.

Contacts (2) New

Sean Forbes Tit... CFO E... sean@edge... Ph... (512) 757-60...
Rose Gonzalez Tit... SVP, Procure... E... rose@edge.c... Ph... (512) 757-60...

View All

PropperDocs Agreement

No Agreement has ben sent yet.

Create New Agreement

Activity Chatter

- PropperSign's Lightning Web Component appears on various Salesforce pages.
- It sends the appropriate agreement linked to the Salesforce object and state.
- Creating and sending agreements is done with just one click.

Track Agreement Status

The screenshot displays a Salesforce record for an opportunity named 'Edge Installation'. The header includes the opportunity name, account name 'Edge Communications', close date '11/15/2024', amount '\$50,000.00', and owner 'Greg Alger'. Below the header is a stage progression bar with stages: Prospect..., Qualificati..., Needs An..., Value Pro..., Id. Decisi..., Perceptio..., Proposal/..., Negotiati..., and Closed. A 'Mark Stage as Complete' button is visible. The main content area is divided into two sections. The left section, titled 'Activity', shows tabs for Activity, Details, and Chatter. It includes a toolbar with 'New Task', 'Log a Call', 'New Event', and 'Email' buttons, and a filter section for 'All time', 'All activities', and 'All types'. The activity list is currently empty, showing 'No activities to show.' and 'No past activity. Past meetings and tasks marked as done show up here.' The right section, titled 'PropperDocs Agreement', shows the agreement name 'Master Service Agreement - 2025-0...', status 'Sent', and a list of participants: 'Rose Gonzalez' (Pending) and 'PropperDocs Legal' (Pending).

Opportunity: Edge Installation

Account Name: Edge Communications | Close Date: 11/15/2024 | Amount: \$50,000.00 | Opportunity Owner: Greg Alger

Stages: Prospect... | Qualificati... | Needs An... | Value Pro... | Id. Decisi... | Perceptio... | Proposal/... | Negotiati... | Closed

Activity | Details | Chatter

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

PropperDocs Agreement

Agreement: View Agreement
Name: Master Service Agreement - 2025-0...
Status: Sent

Participants

- Rose Gonzalez (Pending)
- PropperDocs Legal (Pending)

Related

- Quickly view all your agreements within Salesforce.
- Monitor the overall status of your agreements.
- Track the status of each individual participant.