



Sertifi for Salesforce.com Building a Custom Integration



Steps to use the Sertifi Apex call

These instructions will walk you through the steps necessary to create a custom integration of Sertifi in Salesforce.com, such as a one click process for requesting signatures.

1. Install the Sertifi application as described in the Sertifi for Salesforce Installation Guide
2. Construct an instance of the Sertifi Econtract object. The Sertifi Econtract object contains:
 - a. At least one Signer Object
 - i. Signer Object contains two master detail records, one to contact, the other to econtract, both are required.
 - ii. Signer level name is optional, but should match the names given in the Sertifi Settings
 - iii. Signer order (0 = Carbon Copy, 1 = First signer, 2 = Second Signer)
 - b. At least one of the following
 - i. An edocument
 1. Each edocument contains one attachment
 - ii. A payment

Note: The Econtract can contain multiple edocuments and payments, but must include at least one edocument or payment
 - c. The Sertifi Setting ID
3. Execute the Apex call SendEcontractToSertifi
 - a. Pass the ID of the Econtract Object as the only parameter

Note: This Apex call will create the Signature Request & add documents to the request. If you want an email sent automatically as part of this call make sure InviteSignerDefault is checked in the Sertifi Setting you are using to create the Sertifi Econtract.



Sample code

This code is a sample of how to execute the Apex call SendEContractToSertifi. You can use this for step 3 above.

```
/**
 * Method calls Sertifi sendEContractToSertifi method with eContract that
 * was created.
 * or referenced in createNewEContract.
 *
 *
 * @return TBD
 * @throws TBD
 */
@future(callout=true)
public static void callSertifi(string econtractID){

    Sertifi2_0__SertifiSettings__c sertifiSettings =
    Sertifi2_0__SertifiSettings__c.getInstance('Settings');

    if (Test.IsRunningTest())
    {
        //Do Nothing for test
    }
    else
    {
        Sertifi2_0.SertifiSFAPI.sendEContractToSertifi(econtractID,
sertifiSettings );
    }
}
```

