This guide will take you through the process of installing, configuring and using the airSlate application for your Salesforce organization.

Requirements:

- A Salesforce account and working knowledge of Salesforce.
- An airSlate account.

Updated on Jul 06, 2022
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Installation and Configuration

Below are step-by-step instructions for installing and configuring airSlate for your Salesforce organization. Note that airSlate is fully functional in both the Salesforce Classic and Salesforce Lightning environments.

Requirements:
- a Salesforce organization with admin privileges (required for package installation)
- an airSlate account
- user permissions that are required:
  - for installing the app and administering an integration: Modify All Data, Manage Users, API Enabled, Apex REST Services
  - for using airSlate custom buttons: Apex REST Services
  - for using the airSlate Flows app: Apex REST Services, API Enabled

Enhanced Email option must be activated (Setup → Enhanced Email)

Installation

Add airSlate to your Salesforce organization by following the steps below.

1. Go to the AppExchange using this link http://appexchange.salesforce.com/ and login with your Salesforce credentials.
2. In the search field, type in *airslate* and hit **Enter** on your keyboard. Then, select the airSlate for Salesforce app from the list.

3. Select **Get It Now** to install the most recent version of airSlate for Salesforce.

4. On the next page, select **Install in Production** or **Install in Sandbox**.
Confirm your installation details. Remember to select the **I have read and agree to the terms and conditions** checkbox, then click **Confirm and Install**.

5. On the next page, select **Install for All Users**, then click **Install**.
6. Tick the **Yes, grant access to these third-party websites** checkbox and click **Continue**.

The installation process may take several minutes. You will be notified via email when the installation is complete.

7. Click **Done** to proceed to your organization and configure the application.

You've successfully installed airSlate for your Salesforce organization and can proceed to configuration.
Tip: Try refreshing the page if airSlate hasn't appeared in the **Installed Packages** section.
Configuration

Easily authorize an administrator account in airSlate, add teammates to your airSlate workspaces and configure airSlate with your Salesforce organization.

Setup Wizard

Easily authorize your airSlate account or create a new one. Connect a workspace to your Salesforce organization and add teammates and coworkers using the Setup Wizard.

The Setup Wizard will be available right after the airSlate package has been installed. You’ll be able to adjust your settings in the Admin Tools tabs after.

Note: If Admin Tools aren’t available after package installation (due to lack of permissions), check back later when permission sets will be assigned.

To assign airSlate permission set manually, refer to the Failed to access Admin Tools section of this user guide.

1. In the Installed packages section, click Configure next to your installed airSlate package.

Alternatively, go to the App Launcher and select airSlate Admin Tools in the list.
The **Setup Wizard** will automatically open.

If you have any questions, select Contact Sales and the Sales team will help you out.

 naprawe: After selecting your workspace, the **Contact Sales** button will change to **Contact Support** if you have a paid subscription.

2. In the **Your account** tab, register an airSlate account if you don't already have one. Your Salesforce credentials will be automatically entered. Register with your existing credentials or enter new credentials. Next, select **Sign Up** and **Save**.
If you already have an airSlate account, select **Sign In to airSlate** at the bottom of the page.

Add your airSlate administrator account credentials and click **Login**.

If you've forgotten your password, click **Forgot password** to recover it. Enter the email you’d like to receive password recovery instructions to. Then, click **Recover My Password**.
3. Once you've successfully logged in to airSlate, you will be redirected to the **Select Workspace** tab.

Choose the airSlate workspace you'd like to add Salesforce teammates to. Click **Select**.

To create a new workspace, click **Create**.
On the next page, enter your company’s information. When finished, click **Create Workspace**.

4. In the **Activate Teammates** tab, choose the users you’d like to invite to your airSlate workspace.

Select the checkboxes next to the users you’d like to invite and click **Activate Teammates**. Use the Quick Find to search for teammates.

To invite teammates later, select **Skip for Now**.
Once activated successfully, the pop-up with all activated accounts will open. Click **Got it, take me to the next step** to proceed.

To select all users in the list, select the checkbox next to **Full name**.
5. Once users have been added successfully, the **Getting Started** tab will open.

Create a new Flow by selecting **Create Flow**.

If you already have Flows you’d like to create Custom Buttons for, click **Skip**. The **Custom Buttons** tab will automatically open for creating Custom Buttons.
Dashboard

The Dashboard tab displays the number of Teammates, Flows, Custom buttons and Scheduled Flows in your Workspace. Clicking one of these options redirects you to the corresponding tab for adjusting settings.

You can also find helpful step-by-step videos on configuring and using airSlate Flows inside Salesforce. To view an instructional video, select Show Video under the feature you want to learn more about.

Ticking the checkbox next to a video saves it in your cookies.

If you have any questions, select Contact Sales and the Sales team will help you out.

Note: If you have a paid subscription, you will see the Contact Support button instead.
Account

View the settings for your admin account in the Account settings page.

To change the airSlate administrator account, select Disconnect. Once disconnected you'll be able to connect the necessary administrator account.
Workspace

View the settings for your Workspace in the **Workspace** tab.

To change your airSlate workspace, select **Disconnect**. Then select the needed.

---

**Note:** Salesforce administrators without admin access to a connected Workspace will have to disconnect an administrator account prior to disconnecting an airSlate workspace. Otherwise, the **Disconnect** button will be inactive.
**Teammates**

Invite new users to your airSlate workspace & give them instant access to an airSlate package. Allow them to use airSlate inside Salesforce without having to register or log in to airSlate.

To do so, click the three dots next to the user you intend to add and select *Activate user*. Use the quick find to search for teammates.

👉 **Tip:** Hover over ❌ and ✔ next to each user to find detailed information about their Workspace and package statuses.

Once activated, you’ll see the confirmation pop-up. Click *Got it* to continue.
To revoke an active user's access to airSlate functionality in Salesforce, select the user you need and click **Remove from package**.

In the confirmation pop-up, select **Yes, remove**.

You can also revoke an active user’s access to your Workspace and all airSlate functionality in Salesforce. To do so, select the user you need and click **Block user**.
In the confirmation pop-up, select **Yes, deactivate**.

To invite multiple teammates to airSlate workspaces and grant them access to an airSlate package at once, select the checkboxes next to the teammates you’d like to invite.

Then, select **Activate users**.

Once activated successfully, the pop-up with all activated accounts will open. Click **Got It** to proceed.
To revoke access to airSlate functionality in Salesforce from multiple active users, click the three dots next to the users and select **Remove from package**.

You can also revoke access to your Workspace & all airSlate functionality from multiple active users. To do so, select the users you need, then click **Block users**.
Filter your teammates by their workspace status, package status, or profile by clicking the **Show all teammates** dropdown at the top.
Workspace Flows

Instantly view a list of existing airSlate Flows in a connected workspace or create a new Flow in seconds. Get Flow IDs in a click and use them for setting up processes in the Salesforce Process Builder.

To create a new Flow, select **Create Flow**.

If you haven't created any Flows yet, click **Set up Now** at the bottom to set up your first Flow.

Click on the Flow ID to copy it to the clipboard (required for setting up the Salesforce Process Builder).
Use the quick find to search for your workspace Flows.

Clicking on the Flow name will open it in the airSlate application.

Add filters for your Flows by assigning them specific layouts and conditions. When in the Flows app, users will only be able to see Flows for the records with layouts you've selected or Flows matching the conditions you've specified.

To do so, select the checkbox next to the Flow you intend to add filters to and select **Add filters**.

To edit any existing filters, select the checkbox next to the Flow(s) you need. Then, select **Edit filters**.
The page with the Filter settings will open:

1. In the **Layouts** tab, choose your layouts by ticking their checkboxes. To select every layout in the list, click **Select all** above the Layouts search line. To unselect the selected layouts, click **Un-select all**.

Proceed to the Conditions settings or click **Save** to finish.

When in the Flows app, a list of Flows will be filtered according to the layout of the starting Salesforce record.

2. In the **Conditions** tab, you can set the conditions for filtering Flows in the Flows app.

For example, you can set a condition for filtering your Flows by US state.

To do so, choose the Salesforce object and the object field. Enter a value that the selected object field will be equal to:

**Account → BillingState → is equal to → New York**
When finished, click **Save**.

You can also copy the filter conditions from one Flow to another. To do so, select the checkbox next to the Flow you need and select **Copy filters**.
Then, to paste the copied filters, select the Flow(s) you need and click **Paste filters.** The Flow you’ll be copying filters from can remain unchecked.

You can also edit the Flow link’s sharing options by selecting **Edit links.**

Alternatively, click the three dots next to the Flow you need. Then select **Edit links.**
The **Flow Links Settings** pop-up will open:

The Flow's shareable links are disabled by default. To activate them, switch the toggle.

Once switched, you'll be able to copy a **public link** or **smart link** by clicking them:

- A **public link** will allow for the Flow to be accessed by anyone with the link.
- A **smart link** should be copied to a Salesforce record's Formula field. Once shared, users will have access to the Flow's documents with Salesforce record data filled according to the Bots configured.

🗒 **Note:** If you have configured any roles for the Flow, there will be separate links for the first role and default access role.
Scheduled Flows

Schedule your documents to be created with regards to specific Flows. Simply set the date and time, and your Flows will be run automatically according to your settings.

1. To begin scheduling, select **Create Schedule**.

If you haven't created any schedules yet, click **Set up Now** at the bottom to set up your first Scheduled Flow.
2. The **Schedule Wizard** will open.

In the **Schedule info** tab, enter a name for the schedule being created.

Choose the Flow you’d like to use for your schedule.

Select **Next to Frequency** to proceed.

Alternatively, switch to the **Frequency** tab.
In the **Frequency** tab, specify how often you’d like your Flow to run (daily, weekly, on specific days of a month, using custom dates or Cron expression) and set a starting point:

- **If Daily**, specify the starting time for the Flow to run.

- **If Weekly**, choose the days of the week (one or more) and the starting time for the Flow to run.
• If **Dates of month**, specify the dates of the month by dividing them with a comma, or specific periods of time by using a dash (example: 1, 5-7, 25 etc.). Enter a month value from 1-12.

Choose the month your Flow will be started from with the specified frequency and set the starting time.

Your Flow will run each day of each month you've specified starting from the specific month.

• If **Custom**, specify the numerical sequence of the day of the week, choose the day of the week and the month for your Flow to run.

Set the starting time for running your Flow.

**Example:** The Flow will run each 3rd Friday of December, starting from 12 am.
If **Cron expression**, enter the Cron expression with the set frequency for running your Flow.

The following are the values for the Cron expression:

<table>
<thead>
<tr>
<th>Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seconds</td>
<td>0-59</td>
</tr>
<tr>
<td>Minutes</td>
<td>0-59</td>
</tr>
<tr>
<td>Hours</td>
<td>0-23</td>
</tr>
<tr>
<td>Day_of_month</td>
<td>1-31</td>
</tr>
<tr>
<td>Month</td>
<td>1-12</td>
</tr>
<tr>
<td>Day_of_week</td>
<td>1-7</td>
</tr>
<tr>
<td>optional_year</td>
<td>null or 1970-2099</td>
</tr>
<tr>
<td>?</td>
<td>no value</td>
</tr>
<tr>
<td>*</td>
<td>all values</td>
</tr>
<tr>
<td>L</td>
<td>last</td>
</tr>
</tbody>
</table>
Examples:

<table>
<thead>
<tr>
<th>Expression</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 0 0 ? * * *</td>
<td>at 12:00 AM every day</td>
</tr>
<tr>
<td>0 0 10 ? * *</td>
<td>at 10:00 AM every day</td>
</tr>
<tr>
<td>0 0 10 * * *</td>
<td>at 10:00 AM every day</td>
</tr>
<tr>
<td>0 0 10 * * *</td>
<td>at 10:00 AM every day</td>
</tr>
<tr>
<td>0 0 15 ? * * *</td>
<td>at 3:00 PM every day</td>
</tr>
<tr>
<td>0 0-5 15 * *</td>
<td>Every minute starting at 3:00 PM and ending at 3:05 PM, every day</td>
</tr>
<tr>
<td>0 15 17 ? * MON-FRI</td>
<td>at 5:15 PM every Monday, Tuesday, Wednesday, Thursday and Friday</td>
</tr>
<tr>
<td>0 15 10 15 *</td>
<td>at 5:15 PM on the 15th day of every month</td>
</tr>
<tr>
<td>0 15 17 ? * 6#3</td>
<td>at 5:15 PM on the third Friday of every month</td>
</tr>
<tr>
<td>0 0 18 ? * 6L</td>
<td>runs the last Friday of every month at 6:00 PM</td>
</tr>
<tr>
<td>'0 30 * * *'</td>
<td>every 30 minutes</td>
</tr>
<tr>
<td>0 0 12 * * *</td>
<td>at 12:00 PM every day</td>
</tr>
<tr>
<td>0 0 23 * * * ? 2016</td>
<td>runs every day at 11:00 PM during the year 2016</td>
</tr>
</tbody>
</table>

Once entered, select Test expression to check if it has been entered correctly.
Once the frequency for running your Flow has been set, select **Next to Batch Settings** to proceed.

Alternatively, switch to the **Batch Settings** tab.

In the **Batch Settings** tab, choose a method for creating your documents:

- Selecting **SOQL Query** and entering a query will set parameters for Salesforce records and record data to be selected and used to create a document.

Enter a SOQL query, then select **Test query** to check if it has been entered correctly.

Here you will find the [Query constructor](#) that will help you build the correct SOQL query.

Once done, click **Finish**.

- Selecting a **Salesforce Report** allows for Salesforce records to be selected and use data to create a document.
Select the Salesforce report you’d like to use.

Here you’ll find standard Salesforce objects for creating documents of certain standard Salesforce report types:

<table>
<thead>
<tr>
<th>Accounts &amp; Contacts:</th>
</tr>
</thead>
<tbody>
<tr>
<td>DandBCompany =&gt; &quot;D&amp;B Company with and without Accounts&quot;.</td>
</tr>
<tr>
<td>Contact =&gt; &quot;Contacts &amp; Accounts&quot;, &quot;Contacts with Assets&quot;, &quot;Contact History&quot;.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity =&gt; &quot;Opportunities&quot;, &quot;Opportunities with Products&quot;, &quot;Opportunities with Contact Roles&quot;, &quot;Opportunities with Partners&quot;, &quot;Opportunities with Competitors&quot;, &quot;Opportunity History&quot;, &quot;Opportunity Field History&quot;, &quot;Opportunity Trends&quot;, &quot;Opportunities with Contact Roles and Products&quot;.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer Support Reports:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case =&gt; &quot;Cases&quot;, &quot;Case Lifecycle&quot;, &quot;Cases with Contact Roles&quot;, &quot;Cases with Assets&quot;, &quot;Cases with Solutions&quot;, &quot;Case History&quot;.</td>
</tr>
<tr>
<td>Solution =&gt; &quot;Solutions&quot;, &quot;Solution Categories&quot;, &quot;Solution History&quot;.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Leads:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead =&gt; &quot;Leads&quot;, &quot;Leads with converted lead information&quot;, &quot;Lead History&quot;.</td>
</tr>
</tbody>
</table>
Campaigns:
Campaign => "Campaigns", "Campaigns with Contacts", "Campaigns with Leads", "Campaigns with Opportunities", "Campaigns with Campaign Members", "Campaigns with Leads and Converted Lead Information", "Campaigns with Influenced Opportunities".

Activities:
Event => "Events with Invitees".

Contracts and Orders:
Contract => "Contracts", "Contract History", "Contracts with Orders", "Contracts with Orders and Products", "Contracts with Contact Roles".
Order => "Orders", "Orders with Products", "Order History".

Price Books, Products and Assets:
Product2 => "Products", "Products with Opportunities", "Products with Assets".
Pricebook2 => "Price Books with Products".
Asset => "Assets", "Assets with Cases".
Administrative Reports:
User => "Users".
Report => "Reports".
Document => "Documents".
LoginGeo => "New Login Locations".
VerificationHistory => "Identity Verification Methods".
CollaborationGroup => "Collaboration Group Report".
CollaborationGroupFeed => "Collaboration Group Feed Posts Report".

File and Content Reports::
ContentDocument => "Content Report", "File and Content Report"
ContentFolder => "Library and User Report".

Once done, click Finish.
The scheduled Flow will be added to your **Scheduled Flows** list.

Clicking a scheduled Flow’s name will open it in the airSlate application along with all related revisions.

To edit, remove, deactivate, or get detailed schedule information, select the checkbox next to the schedule you need. Then, select the corresponding option.

Reactivate a deactivated schedule by selecting the checkbox next to the schedule you need and select **Activate schedule**.

Once the scheduled batch has been run, you will be notified via email on how documents were generated for selected records.
Custom buttons

Switching to the Custom Buttons tab will open the Custom button manager. Use the manager to create quick send buttons with regards to airSlate Flows and add them directly to your Salesforce records.

Creating custom buttons

To create a new custom button, click Create Button in the upper right corner.

If you haven't created any buttons yet, click Set up Now at the bottom to set up your first custom button.

The Custom Button Wizard will open.

In the Button Info tab, enter a label for your button (it will appear in your record page) and a short description (will be entered automatically right after clicking the Description field).

Click Next to Action Settings to proceed.

Alternatively, switch to the Action Settings tab.
In the **Action settings** tab, select an action for your Custom Button.

1. Selecting **Run airSlate Flow**, creates documents with regards to a specific airSlate Flow.

Choose the airSlate Flow you’d like to use the button for.

Select the Custom Button mode:

- Selecting **Run airSlate Flow & open the first Step in a new tab** (single record only) creates a document and then automatically opens it in the airSlate editor in a new browser tab. This mode is set by default.

- Selecting **Run airSlate Flow & open the first Step in IFrame** (single record only) creates a document and then automatically opens it in the airSlate editor within Salesforce.

- Selecting **Run airSlate Flow** creates a document with regards to the selected Flow.

仓储三：The **Run airSlate Flow** mode must be selected in order to create the **List Views custom button**.
2. Selecting Run Salesforce Process triggers the Salesforce Process to run different airSlate Flows, depending on the Salesforce record data.
Once selected, click **Next to Layouts and Lists** to proceed.

Alternatively, switch to the **Layouts and Lists** tab.

In the **Layouts and Lists** tab, select a Salesforce object layout or list (or several) where the button will be added by ticking the checkbox next to them.

- Selecting **Layouts** will add a custom button to each Salesforce record.
- Selecting **Lists** makes the custom button available for Salesforce List Views, allowing for multiple documents to be sent to multiple users at once. (See how it works in the **Send documents to multiple users** section of this user guide).

Use the quick find to search for layouts and lists.

Select whether to view the lists, the layouts or both in the **Show Layouts and lists** drop down. When done, click **Finish**.

🎉 That's it! The button will be automatically created and added to your Salesforce object(s) or List Views. Proceed to the Salesforce records to start using it with your airSlate flow.
To see what lists and layouts a custom button has been added to, hover over the number of lists and layouts.

To edit, remove, or view details for a created custom button, select the checkbox next to it. Then, choose the corresponding action.

Use the quick find to search for created buttons.
Adding buttons to a Digital Experience site

If you'd like to use airSlate custom buttons on a Digital Experience portal, you'll need to configure them manually. To do so, please follow the steps below:

1. Once a Custom button has been successfully added to the Digital Experience layout, go to Setup.
2. Search for All Sites in the Quickfind. Then, copy the link of the Digital Experience site you need.
3. Proceed to the Object Manager. Then, select the Digital Experience site layout you've added your button to.
4. Select Buttons, Links, and Actions. Then, click Edit next to the button you've created.
5. Paste the copied link of the Salesforce Digital Experience site before /apex. Make sure you do not delete any existing text that was previously entered.
6. When finished, click Save to keep your changes.
Running a Salesforce Process via a custom button

Once you’ve created a custom button for running a Salesforce Process, proceed to the Salesforce Process Builder to set up your Salesforce Process.

💡 How it works:

1. Go to **Setup**. Type **builder** in the Quickfind and in the search result, select **Process Builder**.

2. On the **Process Builder** page, select **New** in the upper right corner to create a new process.
3. In the **New Process** pop-up, enter a name for the process.

The API name will be entered automatically right after clicking the **API Name** field.

You also have the option to add a description of the process being created.

Define the action that will act as the trigger for creating a document according to a specific Flow (in the example, **the process starts when a record changes**).

When finished, click **Save**.

4. Next, the Process Builder creation scheme will open.

Click **Add Object** to select the object for which you are creating a process.

In the **Object** dropdown, choose the object you’d like to base this process on (**Opportunity** in the example).
Select **When a record is created or edited** to specify when to start the process.

When finished, click **Save**.

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โปรดตรวจสอบการเปลี่ยนแปลงก่อนการบันทึกลงที่กำหนดไว้. คุณจะไม่สามารถเปลี่ยนแปลงข้อมูลที่บันทึกแล้วได้.

5. Select **Add Criteria**.

Enter a name for the Criteria (**Some Criteria**, in the example).

The name you enter will appear on the canvas. We recommend using a name that helps you differentiate between other criteria nodes.

Select **Conditions are met** for the criteria type to execute actions.
In the **Set Conditions** section, provide the following data:

- For the first row: Field (required field): airSlate Invoke Process → Operator (required field): equals → Type (required field): string → Value (required field): Custom Button ID*.
- For the second row: Field (required field): airSlate Invoke Process → Operator (required field): is changed → Type (required field): boolean → Value (required field): true.

Next, fields can be set up according to the conditions you need.

*To retrieve the Custom button ID, go to [airSlate Admin Tools](https://www.airslate.com) and switch to the **Custom Button** section. Select the custom button you need. Then, select **Button Info** and copy the Custom button ID.

When finished, click **Save**.
6. Follow the TRUE arrow and in the **Immediate Actions** section, select **Add Action**.

For the **Action Type**, select **Apex** from the dropdown menu. Enter the Action name (**Execute**, in the example). For the **Apex Class**, select **Run airSlate Flow**.

Once the Apex Class has been defined, the **Apex Variables Settings** section will appear.
● For the first row: Flow ID (required field) → type: String → value: flowId*

● For the second row: Record ID (required field) → type: Field Reference → value: Contact Id, Campaign Id, Campaign Member Id, etc.

* To find a Flow ID, go to the airSlate Admin Tools, then select the Workspace Flows tab. Click on the Flow ID to copy it.

When all settings have been specified, click Save.

If you intend to use this process via the airSlate custom button, make sure to add an action that will clear the airSlate Invoke Process field:

1. In your Salesforce Process, select Add Criteria.

Enter a name for the Criteria (Clear airSlate field, in the example).

Select No criteria—just execute the actions!

2. Follow the TRUE arrow and in the Immediate Actions section, select Add Action.

For the Action Type, select Update Records from the dropdown menu.

Enter the Action name (Clear airSlate field, in the example).

For the Record, choose the record that started your process (Opportunity record in the example).
For the **Criteria for Updating Records**, select *No criteria - just update the records!*

Set new field values for the records you update using the following:

Field (required field): airSlate Invoke Process → Type (required field): Global Constant → Value (required field): GlobalConstant.Null.

When finished, click **Save**.

To activate the Process Builder, select **Activate** on the **Process Builder settings** page.
In the **Activate Version** pop-up, select **Confirm**.

🎉 That's it! Your Salesforce Process will be activated any time you click the Custom button.
Settings

Clear your Salesforce email history which airSlate uses for storing batch report emails as well as local copies of Slate histories for preserving space in your Salesforce organization. Prepare your airSlate app for uninstallation by removing settings such as permission sets and custom buttons in seconds.

- To clear your emails history, select **Clear Emails History**.

In the **Delete airSlate data** pop-up, select **Yes, delete**.
To uninstall an airSlate app, select **Wipe Settings** (for more information about uninstalling an app see the **Uninstall** section of this user guide).
Send documents to multiple users

Easily send documents to up to 75 Salesforce users all at once. Just add a custom button that connects a Flow to your List Views for standard and custom objects. Then, select Salesforce records and send your documents in a click.

🌟 How it works:

1. To send documents from multiple records, you'll need to create a custom button first.

To do so, go to Installed Packages and click Configure next to the installed airSlate package. In the Admin Tools tab, switch to Custom Button and click Create Button.

2. The Custom Button Wizard will open.

In the Button Info tab, enter a label for your button and a short description (will be entered automatically right after clicking the Description field). Click Next to Action Settings to proceed.
3. In the **Action Settings** tab, select **Run airSlate Flow**.

Choose the airSlate flow you'd like to use the button for.

Select **Run airSlate Flow** as the Custom Button mode.

>Note: If the **Mode** field is set to a value other than **Run airSlate Flow**, you will be unable to select the Salesforce object record list(s).

Once finished, select **Next to Layouts and Lists** to proceed.
4. In the **Layouts and Lists** tab, select the Salesforce object record list(s) that the custom button will be added to.

![Note: Selecting any layout will add the custom button to each Salesforce record separately, while remaining unavailable for the list of records.]

To view available lists for adding a custom button, select **Only lists** in the **Show Layouts and lists** drop down menu.

Select the checkbox next to the needed list(s).

When done, click **Finish**.

![Salesforce layouts and lists](image)

The custom button will be automatically added to the selected Salesforce object record list(s).

To use your custom button, navigate to the selected Salesforce object (**Opportunity** in the example).

![Note: Due to Salesforce limitations, the custom button won't be shown on **Recently Viewed** or **Related** pages.]

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Select the Salesforce records for the **List Views** you'd like to send your Flow to. Click the custom button in the upper right corner (**Send Contract** in the example).

You will be notified via email once the Document Slates have been sent successfully.
airSlate Flows app (Flows filtered by layouts and conditions)

Get quick access to airSlate Flows in your current workspace in seconds. Run the airSlate Flows of your choice with a single click, no need to create a separate custom button for each Flow. You can determine which Flows will be available for users in the Flows app by specifying layouts and conditions for each Flow in the Workspace Flows tab (Admin Tools).

In your Salesforce record, select the custom button you need (previously created in the Admin Tools) to access the airSlate Flows application.

🌟 Tip: To create a custom button for opening the Flows app, see the Creating custom buttons subsection of this user guide.

If you haven't yet logged in to the airSlate app, enter your credentials and select Log in.

If you've forgotten your password, click Forgot password to recover it. Enter the email you’d like to receive password recovery instructions to. Then, click Recover My Password.
Once logged in, the **airSlate Flows** app will open. The airSlate Flows created in your current airSlate workspace will be displayed in the List view mode by default.

To return to the Table view mode, select the corresponding button on the right. The Flows will then appear as follows:
Use the quick find to search for your airSlate Flows.

Sort your Flows by name using the **Sort by** menu.

Click the Flow you need to start it. Once clicked, the Slate will be automatically created and opened in the editor.
Slates Dashboard (recent Slates created inside Salesforce)

Instantly access a list of recent Slates created inside your Salesforce organization. Get detailed information on the Salesforce objects records they have been created for as well as the last revision date and airSlate flows they belong to.

1. Go to the **App Launcher** and select the airSlate application.

2. Switch to the **Slates Dashboard** tab.

   If you haven't yet logged in to the airSlate app, enter your credentials and select **Log in**.
If you've forgotten your password, click **Forgot password** to recover it. Enter the email you'd like to receive password recovery instructions to. Then, click **Recover My Password**.

Once logged in, you can view a list of all Slates you've created in Salesforce for the past 7 days (by default).

The **Slates Dashboard** tab will show the latest revision of each Slate, with a full breakdown of information.

Use the Quick Find to search for the Slates you need.
Click the Slate's name to edit it.
To edit a Slate revision, hover over it and select the corresponding option.

To create a new Slate revision, select Revise.

- If you are a Flow administrator, you'll be able to create new revisions for any Slate in your Flow.
- If you are a Flow administrator, you'll be able to create new revisions for any Slate in your Flow.
To delete a draft revision and create a new one, select the three dots next to it. Then, select **Discard draft**.

To delete a Slate from the Slates Dashboard, click the three dots and select **Remove Slate**.
To delete multiple Slates at once, select the Slates you need. Then, click **Remove Slates**.

- If you are a Flow administrator, you’ll be able to delete any Slates in your Flow.
- If you are a Supervisor/Workspace owner, you’ll be able to delete any Slates in any Flows.

Filter Slates by time period, Salesforce objects, or the airSlate Flows they belong to. You can also filter Slates by their status or tags.
• To view Slate revisions for a specific time period, click the **Last modified date** field.

In the calendar, select the desired time period, then click **Apply**.

It's also possible to select the current day as well as the previous week or previous month, beginning with the current date.

All Slates revisions created for a selected time period will instantly appear in the Slates Dashboard.

• To filter Slates by their status, in the **All statuses** list, select the one you need. Then, click **Apply**.

> **Note:** Slate statuses will be automatically added to a list once certain actions are performed with Slates.
To filter Slates by their tags, go to the All tags list and select the one you need. Then, click Apply. Use the search line to locate the tag you need.

You can also sort Slates by name, date of last update, or date of last creation.

Switching the My Slates toggle to on will display Slates created by you as well as revisions you have created in other user’s Slates.
Using Salesforce attachments/files as documents in airSlate Flows

Import attachments/files from Salesforce into your Flows using the Custom buttons. Edit attachments/files and then export them back to Salesforce. Before you start, make sure your Flow meets the following requirements:

★ contains the Document Placeholder
★ the Pre-fill Salesforce Records Attachment Bot has been configured
★ the Export to Salesforce Bot has been configured

To allow users to edit attachments/files imported from Salesforce, you need to configure the Enable Editing Features Bot (see the Assigning the editing permissions (Annotation Panel) section of the Document Placeholder user guide in the airSlate Help Center) as well.

Now let’s proceed to creating a Custom button. Once you’ve selected the appropriate Flow, the Select record attachment toggle will appear (disabled by default). Enable the toggle.

Finish creating your Custom button.
After users select the Custom button you’ve created, the list of Salesforce attachments/files will appear. They will be able to choose multiple PDF/DOCX attachments to import via the Document Placeholder.

The selected attachments will then be merged into a single document. Users will be able to set the merge order if needed prior to proceeding.

The selected attachments will be imported via the Document Placeholder and instantly open in the PDF editor as a single Slate document.
Once finished, click **Complete**. The document will be instantly exported to the selected Salesforce record as an attachment/file.

**airSlate Lightning sidebar component**

Use the airSlate Lightning component for direct access to the list of all record-related Flows. Easily track when your Document Slates have been completed by your teammates.

**How to add**

To add the component to your record page (**Sample Opportunity** in the example) click the cog icon and select **Edit Page**.

---

**Note:** this action can only be implemented by the administrator of the Salesforce organization.
Scroll down the list of **Lightning Components** on the left and select the airSlate component. Drag and drop it directly on your record page. Click **Save**, then select **Activation**.

In the **Page Saved** pop-up, click **Activate** to make it visible to users.
In the **Activation** pop-up, select **Assign as Org Default** to make the component accessible from all the records in your organization.

Click **Save** in the **Set as Org Default** pop-up.
Click **Save** in the upper right corner to save your settings. Then select **Back** to exit page editing mode.

Now the airSlate Lightning component will be located right where you've added it on your record page. Instantly get access to all record-related Flows and Slates.
How to use

Easily track whether your Slates have been completed by your teammates and view all revisions of your Slates with the airSlate Lightning sidebar component.

Sort Flows by order, name and last revision date. Instantly access Slates by sorting them according to order, slate owner, last revision date or last revision owner.

1. To find a specific Flow in the Flow list, type the first letter of its name in the search line.

Select the dropdown menu on the right to define the order your Flows will be displayed in the list. Sort them by name or last revision date.
2. To see the list of Slates related to the Flow, select the necessary Flow in the list.

In the next window, use the search line to locate specific Slates by their owners.
Select the dropdown menu on the right to define the order your Slates will be displayed in the list. Sort them by last revision date, Slate owner, or last revision owner.

3. Select the necessary Slate to:
   - create a new Slate revision (click Revise)
   - view the latest Slate revision (click View)
   - delete the current Slate (click Remove Slate)
   - view a list of every revision for a Slate (click Show all revisions)
To delete a draft revision and create a new one, select **Discard draft**.

- If you are a Flow administrator, you’ll be able to create new revisions for any Slate in your Flow.
- If you are a Supervisor/Workspace owner, you’ll be able to create new revisions for any Slate in any Flow.

- If you are a Flow administrator, you’ll be able to delete any Slates in your Flow.
- If you are a Supervisor/Workspace owner, you'll be able to delete any Slates in any Flows.

To return to the Flows list, click the **Home icon**.
airSlate Bots for Salesforce

Easily create airSlate flows and collaborate on documents with your teammates and colleagues. Just configure the needed Bot and create new or update existing Salesforce records, pre-fill your documents with Salesforce record data and more in seconds.

The following airSlate bots for Salesforce are available for use:

- **Pre-fill from Salesforce Record Bot** (activates when a Slate is created or opened / pre-fills a Slate from a Salesforce record)
- **Pre-fill from Salesforce Records with SOQL Bot** (activates when a Slate is created or opened / pre-fills a Slate from a Salesforce record)
- **Create Salesforce Record Bot** (activates when a Revision is completed / creates a Salesforce record from a completed Slate)
- **Update Salesforce Record Bot** (activates when a Revision is completed / updates a Salesforce record from a completed Slate)
- **Update Salesforce Record via SOQL Bot** (activates when a Slate is completed / updates multiple Salesforce records using SOQL query)
- **Export to Salesforce Bot** (activates when a Revision is completed / uploads Slates to the record inside Salesforce)
- **Send a Slate to Salesforce Contact Bot** (activates when a Revision is completed / grants a Slate editing access to a Salesforce contact)
- **Invoke Salesforce Process Bot** (activates when a Revision is completed / invokes a Salesforce process after a Slate has been completed)
- **Notify Salesforce Contacts Bot** (sends an email to Salesforce contacts / activates when a Slate is opened)
- **Notify Salesforce Contacts - Post-finish Bot** (sends an email to Salesforce contacts / activates when a Slate is completed)
- **Sort Table Bot** (defines the sorting order for a table in a document / activates when a Slate is opened)
Switching off airSlate email notifications

Salesforce administrators can switch off email notifications for all users that airSlate for Salesforce sends by default. Refer to the instructions below:

1. Go to Setup and search for Classic Email Templates. Then, for Folder select airSlate Templates.

2. Select Edit next to the email template to switch off the corresponding notifications. Then, in the Email Template Information section, uncheck the Available For Use checkbox.

Once finished, save your settings.
Insert Salesforce files into documents generated from DOCX templates

Insert PDF, DOCX, PNG, JPEG, TXT, or RTF files from Salesforce records into your documents generated from DOCX templates. Use a specific tag in your DOCX templates so that when a Slate is created, this tag will insert a file as an image in the body of a document.

Let's take a look at how to set this up:

1. Open your DOCX template for editing by clicking Edit template.

Then, add syntax for inserting images wherever you need in a DOCX template:

To do so, add the `imageFile(ImgField)` function inside the for tag - where ImgField is a variable name that can be changed.

Save your changes by clicking Complete.
2. Proceed to the **Bots** tab.

Add the **Pre-fill from Salesforce Record Bot** to your Flow.

In the Bot settings, select a base object (**Opportunity** in the example).

Then, select related (child) objects of the base object in the following order:

- **ContentDocumentLink [LinkedEntityId]** → **ContentDocument [ContentDocumentId]** → **ContentVersion [LatestPublishedVersionId]**

3. Select **Table** for the data type you’d like to map.
4. Map object fields to document fields:

- Object Field: **ContentView [LatestPublishedVersionId] → VersionData [base64]**
- Document Field: Document name → **File Field**: field name

* Selecting VersionData [base64] will automatically locate the corresponding document file field.

Save your settings by clicking **Apply setup**.

Go to the **List of Slates** to create your first Slate.

That’s it! Once a revision is created, the PDF / DOCX / PNG / JPEG / TXT / RTF files will be automatically added to your Document Slate. The Slate will be pre-filled with all PDF / DOCX / PNG / JPEG / TXT / RTF files contained in the selected Salesforce record.
Salesforce Flow Builder

As the Salesforce Process Builder will no longer be supported, there is an alternative method for creating and setting up Salesforce Processes via the Flow Builder. See the information below about how to use it.

1. When creating a new process, select **Create in Flow Builder**.

2. In the New Flow window, select **Record-Triggered Flow**. Then, click **Create**.

3. You’ll be redirected to the **Configure Start** window. Once the object and trigger condition have been selected, proceed to setting up the entry conditions. This will eliminate any unnecessary Flows.

   Set the Entry conditions for the Salesforce Process to be triggered. Then, select **Only when a record is updated to meet the condition requirements** for the Flow to run.
In the **Optimize the Flow for** section, it’s required to select **Actions and Related Records**. Otherwise, the airSlate actions won’t be available.

👉 **Tip:** We recommend leaving the checkbox in the **Optimize the Flow for** section unchecked for a more seamless Flow operation.

Click **Done** to proceed.
4. You’ll be redirected to the Flow Builder. Add an element by clicking the plus icon. Then, in the Logic section, select Decision.

In the New Decision window, enter a label and API name for the decision.

Next, proceed to the Outcome Details settings (that corresponds with the Criteria settings in the Process Builder). Select when the outcome will be executed. Click Done.
Now proceed with adding the Apex action for the created outcome. To do so, click the plus icon under the outcome. Then, in the Interaction section, select Action.
In the **New Action** window, select the Apex action you need from the list (**Run airSlate Flow** in the example). Click **Done**.

Then, set input values. Once finished, click **Done**.
That's it! The completed Flow builder will appear as follows.
Salesforce Process Builder

The Salesforce Process Builder automates routine tasks for completing Document Slates. Set up documents or revisions to be automatically created once certain changes occur to your Salesforce records or specify other conditions for triggering Flows in the Process Builder.

Let's take a look at how it works:

1. On the Salesforce main page, go to Setup. Type builder in the Quickfind and in the search result, select Process Builder.

2. On the Process Builder page, select New in the upper right corner to create a new process.
3. In the **New Process** pop-up, enter a name for the process.

The API name will be entered automatically right after clicking the **API Name** field.

You also have the option to add a description of the process being created.

Define the action that will act as the trigger for creating a document according to a specific Flow (in the example, **the process starts when a record changes**).

When finished, click **Save**.

4. Next, the Process Builder creation scheme will open.

Click **Add Object** to select the object for which you are creating a process.

🔍 **Note:** When setting up processes that will trigger the activation/deactivation of Salesforce users in airSlate, you can select any Salesforce object that has a user lookup.

In the **Object** dropdown, choose the object you’d like to base this process on (**Campaign Member**, in the example).
Specify when to start the process (when a record is created or edited, in the example).

When finished, click Save.

Note: Before saving your changes, confirm the selection. You won't be able to change the object after saving it.

5. Select Add Criteria.

Here you can configure settings that will trigger:

- the creation/deletion of a document
- the creation & completion of a document revision
- the activation/deactivation of Salesforce users in airSlate

For each action, you should configure different settings and use different Apex classes. Let's consider the following examples.
Create/delete Documents

Enter a name for the Criteria (No Criteria, in the example).

The name you enter will appear on the canvas. We recommend using a name that helps you differentiate between other criteria nodes.

Select No criteria-just execute the actions! for the criteria type to execute actions.

When finished, click Save.

Follow the TRUE arrow and in the Immediate Actions section, select Add Action.

For the Action Type, select Apex from the dropdown menu.

Enter the Action name (Execute, in the example).
For the **Apex Class**, you can select:

- **Run airSlate Flow** – allows for creating new documents
- **Delete documents in airSlate** – triggers a document’s deletion in airSlate

The **Apex Variables Settings** section will appear:
- For the first row: Flow ID (required field) → type: String → value: flowID*.
- For the second row: Record ID (required field) → type: Field Reference → value: Contact Id, Campaign Id, Campaign Member Id, etc.

Note: To find a Flow ID, go to the airSlate Admin Tools, then select the Workspace Flows tab. Click on the Flow ID to copy it.

When all settings have been specified, click Save.

Tip: It is not required to select a starting record in Bots for airSlate Flows that are used in the Salesforce Process. The starting record will be the same as in the Salesforce Process.
Create & finish document revisions

Configuring this process will trigger the creation of document revisions once certain changes occur to Salesforce records. Those revisions will then be automatically completed in the specified time period.

The standard Process Builder’s time period is measured in hours and days. If you need other values (minutes or seconds), you should configure additional settings.

To do so, in the Object Manager select the Salesforce object you need. Then, select Fields & Relationships and click New. In the list of fields, select Formula.

Enter a field label (now_plus_custom_time_interval in the example). For the Formula Return Type select Date/Time.

Enter your formula that will specify the custom time period for completing the revision. We used the next formula in the example that corresponds to 1 hour and 20 seconds:

\[ \text{NOW()} + (1 / (24)) + (20 / (24 * 60 * 60)) \]

Due to the requirements of the formula's structure, we can't set a 20-second time period. Later, we will remove 1 hour in the settings and the time period will correspond to 20 seconds.

Once finished, save your settings. The set time period is mostly required for Bots to finish their work.

Let’s find out how to do this:

1. Select Add Criteria. Then, enter a name for the Criteria (Selected checkbox, in the example).

The name you enter will appear on the canvas. We recommend using a name that helps you differentiate between other criteria nodes.
Select **Conditions are met** for the criteria type to execute actions.

In **Set Conditions**, select the Salesforce field that will trigger document creation & completion. This will allow you to select the required checkbox in the Advanced Settings.

Select conditions (**All of the conditions are met (AND)** in the example).

In the **Advanced settings** section, select the **Yes** checkbox.

When finished, click **Save**.
2. Follow the TRUE arrow and in the **Immediate Actions** section, select **Add Action**.

For the **Action Type**, select **Apex** from the dropdown menu.

Enter the Action name (**Create revision**, in the example).

For the **Apex Class**, select **Create document Revision in airSlate**.

The **Apex Variables Settings** section will appear:

- For the Flow ID (required field) → type: **String** → value: **Flow ID**.
- For the Document ID (required field) → type: **Field Reference** → value: **custom field where a dynamic Document ID will be saved**
Note: Be sure to create (in advance) a Text-type custom field where the dynamic document ID will be saved. Then, add the Invoke Salesforce Process Bot that will update this field in Salesforce with the document ID (Data Variable → Document Name → Document ID), using the condition: Document Revision = 0.

When all settings have been specified, click Save.

3. Select Set Schedule. Then, set a time for the action to execute (20 seconds in the example):

1 → Hours → Before → now_plus_custom_time_interval

When finished, click Save.
Then, in **Scheduled Actions**, select **Add Action**.

For the **Action Type**, select **Apex** from the dropdown menu.

Enter the Action name (**Complete revision**, in the example).

For the **Apex Class**, select **Complete document Revision in airSlate**.
The **Apex Variables Settings** section will appear:

- For the Flow ID (required field) → type: **String** → value: **Flow ID**.
- For the Document ID (required field) → type: **Field Reference** → value: custom field where a dynamic Document ID will be saved

![Image of Apex Variables Settings](image-url)
Activate/deactivate Salesforce users in airSlate

Configuring this process will trigger the automatic activation/deactivation of Salesforce users in airSlate.

Let's consider a case where we need to activate a newly created Salesforce user or deactivate an inactive Salesforce user in airSlate.

📝 Note: When setting these processes, you can select any Salesforce object that has a user lookup.

1. Enter a name for the Criteria (for example New user created or User is inactive in Salesforce). Then, select the criteria you need to execute actions.

Selecting the Conditions are met criteria will open the Set Conditions section. Here you will need to enter a condition that will trigger the user activation/deactivation.

This will allow you to select the checkbox in the Advanced Settings if needed. For example, when you need to set a condition that will be triggered when the user’s status changes to active/inactive.

To do so, select conditions (All of the conditions are met (AND) in the example).

In the Advanced settings section, select the Yes checkbox.
2. In the **Immediate Actions** section, enter the action name (for example **Activate/Deactivate user in airSlate**).

Select the Apex class you need for your process:

- Activate User in airSlate
- Deactivate User in airSlate

In the **Set Apex Variables** section, select user ID for the value.

To activate the Process Builder, select **Activate** on the Process **Builder settings page**.
In the **Activate Version** pop-up, select **Confirm**.
Uninstall

Follow these steps to completely uninstall airSlate from your Salesforce organization.

1. Proceed to the **App Launcher** and select **airSlate Admin Tools**.

   You can also navigate to the **Installed Packages** section and select **Configure** next to the airSlate package. This will open the airSlate Admin Tools.

2. Skip to the **Settings** tab and select **Wipe settings** to remove airSlate from all Layouts and revoke teammate access to airSlate in Salesforce.

嘉年华 Note: Any existing processes set up in the Process Builder will need to be manually deleted prior to uninstalling the airSlate package.
3. Provide your thoughts on how to improve the airSlate application in the **Uninstall Survey** pop-up (this is optional).

Click **Submit & Uninstall** to proceed.

4. You’ll be redirected to the **Installed Packages** page. Select **Uninstall** next to your airSlate package.
5. Scroll down to the bottom of the **Uninstall a Package** page and select **Do not save a copy of this package data after uninstall**, and tick the **Yes, I want to uninstall this package** checkbox.

Then, click **Uninstall**.

6. The Installed Packages page will open.

On this step, the airSlate package may still remain in the **Installed Packages** section. The **Delete** button in the Action column of the **Uninstalled Packages** section may not appear.
7. Wait until the airSlate package has been completely moved from the Installed Packages section to the Uninstalled Packages section (it may take several minutes and require refreshing the page).

Click **Delete** in the Action column.

Confirm your action by clicking **OK** in the pop-up.

airSlate will now be completely uninstalled from your Salesforce organization.
Troubleshooting

Failed to access Admin Tools

If you're not authorized to access Admin Tools, follow the steps below to assign an airSlate set:

1. In the quick find, search for **Permission Sets**. Then, click it in the search result. In the **Permission Sets** section, select **airSlate Set**.

![Permission Sets screenshot](image)

2. In the next window, select **Manage Assignments**.

![Manage Assignments screenshot](image)
3. Next, select **Add Assignments**.

![Add Assignments](image1)

4. Select the checkbox next to the user you want to assign an airSlate set to and click **Assign**.

![Assign](image2)

5. Once finished, you’ll get a notification that an airSlate Set has been successfully assigned to the selected user, click **Done**.

![Done](image3)

Now you can proceed back to the **Admin Tools** tab.
Failed to uninstall airSlate due to a permission set

If the uninstallation fails due to assigned airSlate permission sets, remove the assigned sets manually and repeat the uninstallation process.

1. Click the name of an assigned permission set.

2. In the Permission Sets section, select Manage Assignments.
3. Select the checkbox next to the user you want to remove assignments of the airSlate set from and click **Remove Assignments**.

4. When finished, you will see a notification that the airSlate Set has been successfully removed from the selected user. Click **Done**.

Now you can proceed with completing the uninstallation.
Visualforce refuses to connect in Salesforce

Visualforce page

If the airSlate Lightning component refuses to connect and is highlighted in a grey color, follow the steps below to resolve the issue.

2. Scroll down to the Clickjack Protection section. Then, uncheck the Enable clickjack protection for customer Visualforce pages with headers disabled checkbox.

Once finished, save your settings.
airSlate Admin Tools aren’t working properly on Sandbox

In the case of a Sandbox being created from a production instance, where the airSlate app has already been installed, you may encounter the following issues:

- unable to connect an airSlate admin account
- unable to connect a Workspace, even after connecting an admin account
- the list of layouts isn’t displayed when configuring custom buttons.

Follow the steps below to correct your airSlate app’s compatibility with Salesforce Sandbox:

1. Go to Setup and search for Remote Site Settings.

2. Select AIRSLATE_METADATA_API.

3. Change the instance to your current Salesforce organization.

* To check your Salesforce organization instance, go to Setup. Then search for Company Information.
airSlate custom button issues with Digital Experience sites

Digital Experience site users may encounter issues when using airSlate custom buttons.

The issue may be caused by disabled permissions such as **API Enabled** and **Apex REST Services**.

To enable them, proceed to **System Permissions / Administrative Permissions** in Permission Sets or User Profiles.

Then, select the checkboxes next to **Apex REST Services** and **API Enabled**.

Click **Save** to keep your settings.
airSlate custom button failed: no workspace connected

When clicking a custom button, some users may encounter the following issue:

![Error Message](image)

This error occurs when **Apex Rest Services** is disabled for current users. To avoid the error, ensure that this permission is included in the current user's profile.