



# User guide

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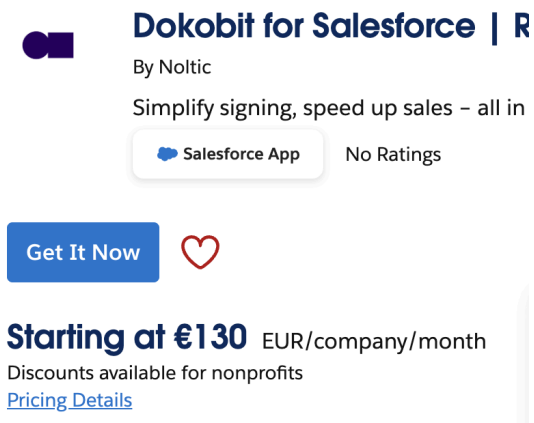
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# Installation steps


## Let us know about your interest

1. Find Dokobit via AppExchange search or navigate there via direct link right [here](#).
2. Click **Get It Now**.



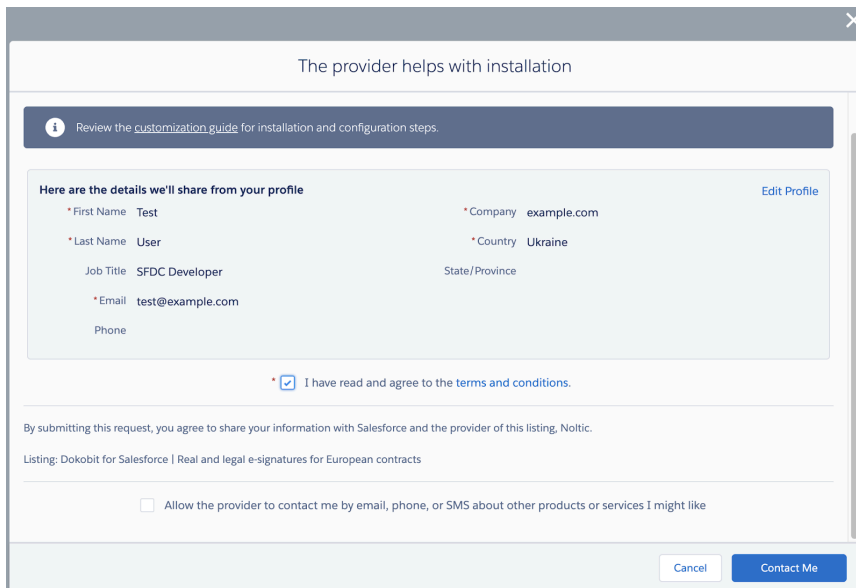
**Dokobit for Salesforce | R**  
By Noltic  
Simplify signing, speed up sales – all in

 **Salesforce App**    No Ratings


**Get It Now** 

**Starting at €130** EUR/company/month  
Discounts available for nonprofits  
[Pricing Details](#)

3. In the window that appears, click **Contact Me**.



The provider helps with installation

 Review the [customization guide](#) for installation and configuration steps.

**Here are the details we'll share from your profile** [Edit Profile](#)

* First Name	Test	* Company	example.com
* Last Name	User	* Country	Ukraine
Job Title	SFDC Developer	State/Province	
* Email	test@example.com		
Phone			

I have read and agree to the [terms and conditions](#).

By submitting this request, you agree to share your information with Salesforce and the provider of this listing, Noltic.

Listing: Dokobit for Salesforce | Real and legal e-signatures for European contracts

Allow the provider to contact me by email, phone, or SMS about other products or services I might like

4. You will receive a notification that we will contact you. **Sit tight!**

✔ We've shared your contact information with the provider. They'll reach out soon to help you with installation. ✕

## Obtain and Use the Installation URL

1. The next step is we contact you with the installation link and test token (if you want to test it on your sandbox). If you need to go through the installation steps together, we can **schedule a call!**
2. Once you have the link, use the correct org.
3. Choose the desired installation option.

### Install Dokobit

By

Install for Admins Only  Install for All Users  Install for Specific Profiles...

App Name	Publisher	Version Name	Version Number
Dokobit		v1.2.0	1.2

[Additional Details](#) [View Components](#)

## Assign Permission Sets

1. Once you receive the notification that installation is complete, navigate to the Setup Menu at the top right corner of your Salesforce and find Permission Sets.
2. **Dokobit Access** – this Permission Set is assigned to Salesforce Users and grants access to the Dokobit Widget.
3. **Dokobit Admin** – this Permission Set is assigned to System Administrators and grants access to the Admin Console.

### To assign a Permission Set:

- Navigate to Setup → Permission Sets.
- Select the required Permission Set.
- Click Manage Assignments → Add Assignments.
- Select the Users.
- Click Next → Assign.

## Configure the Dokobit API settings

1. Search for the **Dokobit Admin Console** in the **Salesforce App Launcher**.
2. Open the tab and enter the **Dokobit API URL** and **Access Token**.

### Dokobit API settings

URL

https://app.dokobit.com

Access token

.....

Show

Save

## Set Up Salesforce Site

- Under the hood, a Dokobit Signing Request sent to a Dokobit Service contains a Postback URL, which allows the Dokobit Service to update the Signing Request with its current status.

**To enable this, a Salesforce Site is created, providing external access for these updates.**

1. In **Setup**, search for **Sites** and create a new **Site**.

2. When creating the Site:

- Enter an arbitrary **Label** and **Name**.
- Select the **Active** checkbox.
- Choose any **Site Home Page** - you cannot create a Site without assigning a homepage.

- The Site Home Page is not used when working with a Managed Package, but Salesforce requires one to be selected during Site creation. You can choose any Home Page from the available ones.

- Leave all other fields as default.
- Click **Save**.

**Site Edit** Save Cancel

Site Label  i

Site Name  i

Site Description

Site Contact  🔍 i

Default Record Owner  🔍 i

Default Web Address  i

Active  i

Active Site Home Page  🔍 [\[Preview\]](#)

Inactive Site Home Page  🔍 [\[Preview\]](#)

Site Template  🔍 i

Site Robots.txt

Site Favorite Icon

## Configure Guest User Access

1. On the saved Site page, click **Public Access Settings**.

Site Details

Dokobit

[« Back to List: Sites](#)

**Site Detail**

Edit Public Access Settings Login Settings URL Redirects Deactivate

Site Label	Dokobit	Site Name	Dokobit
Site Description		Site Contact	<a href="#">User User</a>
Active	<input checked="" type="checkbox"/>	Login	Not Allowed

2. On the **Guest User Profile** page, click **View Users**.

**SETUP Profiles**

**Profile** Help for this Page

### Dokobit Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(12\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

**Profile Detail** Edit View Users

Name	Dokobit Profile		
User License	Guest User License	Custom Profile	✓
Description			
Created By	User User, 26.08.2025, 17:10	Modified By	User User, 26.08.2025, 17:10

3. Open the **Site Guest User** record and assign the **Dokobit Guest User** permission set.

**Dokobit Profile** Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

А | Б | В | Г | Д | Е | Ђ | Ж | З | И | Й | К | Л | М | Н | О | П | Р | С | Т | У | Ф | Х | Ц | Ч | Ш | Щ | Ю | Я | Other **All**

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Site Guest User, Dokobit	guest	dokobit@00dau00000f8fsf2an.org.force.com		✓	Dokobit Profile

## Add Dokobit widgets

Open the Record Page where you want the Dokobit widgets to appear, switch to Edit Mode, and add the following components:

- Document Signer
- Signing Request List

### Custom - Managed (2)

- Document Signer
- Signing Request List

# Dokobit / How to use the integration

## 1. Documents section: Add documents

There are 3 ways to **upload** the document for signature:

**1.1** Click on the **“Select a file to add”** dropdown > select the file from the list.  
(the file should be added to the record attachments)

### Documents

Select a File

Upload Files

 Or drop files

**1.2** Click the **“Upload files”** button > Select the file > Open.

### Documents

Select a File

Upload Files

 Or drop files

1.3 Drag the file to the “Or drop files” area.

## Documents

Select a File

Upload Files

 Upload Files Or drop files

## 2. Recipients section. Add recipients

2.1 Click the “Add Self” purple button to add yourself as a signer.

**Recipients**

**Add Self** **Add External**

Select Contact Role

Select a contact role to add ▼

Search for Recipients

🔍 Search...

Enable Priority

*(Note: the “Add Self” button disappears after being pressed).*

The **Contact** card is displayed at the bottom of the Recipients section after clicking the button.

**Recipients**

**Add External**


Select Contact Role

Select a contact role to add ▼

Search for Recipients

🔍 Search...

Enable Priority

1.  **User User**  
Email: dokobit@noltic.com

Role: Viewer ▼

Language: Default ▼

✕

2.1.1 Click the “Add External” purple button to add another signer.

## Recipients

Add External


Select Contact Role

Select a contact role to add

Search for Recipients

Search...

Enable Priority

1.  **User User**  
Email: dokobit@noltic.com

Role: Viewer

Language: Default

The **Name** and **Email** fields will appear with the **Save** and **Cancel** buttons.

## Recipients

Add External

Name

Email

Save

Cancel


Select Contact Role

Select a contact role to add

Search for Recipients

Search...

Enable Priority

1.  **User User**  
Email: dokobit@noltic.com

Role: Viewer

Language: Default

- Fill in the **Name** and **Email** fields and click the **Save** button
- The new external Recipient's card will appear below (*the external recipient is saved as a new Contact in Salesforce*)

### 2.1.2 Select the Contact from the “Contact Role” list:

- Click on the “Select Contact Role” dropdown
- Choose the contact role from the list

#### Recipients

Add Self

Add External

Select Contact Role

Sweetlaku (Business User) ▼

✓ Sweetlaku (Business User)

🔍 Search...

Enable Priority

### 2.1.3 Select the **Contact** from the existing ones:

- Click on the Search for Recipients field
- Enter the recipient's name
- Select the recipient from the list

#### Recipients

Add Self

Add External

Select Contact Role

Sweetlaku (Business User) ▼

Search for Recipients

🔍 User User ✕

User User (Type: User)

Enable Priority

## Set recipients signing priority

### 2.1.4 Enable Priority

Click on the “Enable Priority” **checkbox**. It allows the user to **drag** the recipient's **cards** up and down to determine the priority of signers.

Enable Priority

The screenshot shows two recipient cards. The first card is for 'User User' with email 'dokobit@noltic.com', role 'Viewer', and language 'Default'. The second card is for 'Ivan' with email 'ivan@gmail.com', role 'Signer', and language 'Default'. Both cards have a red circle around a three-line menu icon (drag handle) and a red arrow pointing to it. The cards are numbered '1.' and '2.' respectively.

### Recipients

Add Self

Add External

Select Contact Role

Select a contact role to add

Search for Recipients

Search...

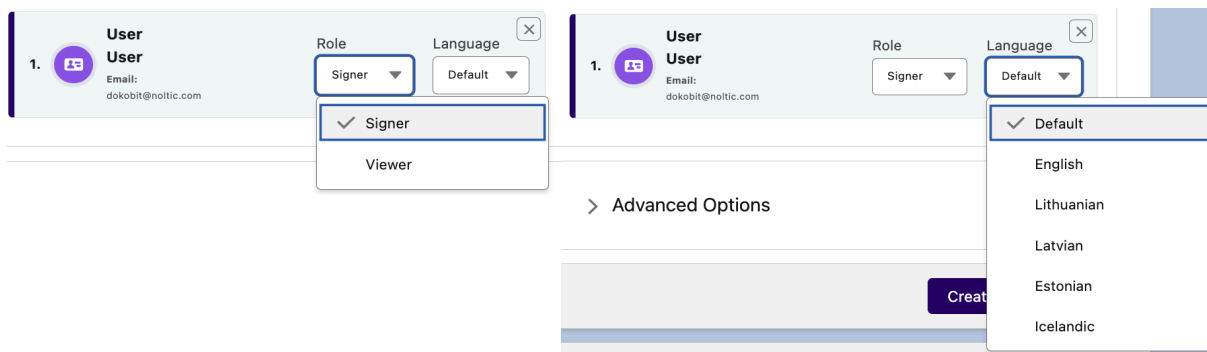
Enable Priority

# Configure recipients (role and languages)

## 2.2 Configure the Recipients

2.2.1 Choose the **Role** and **Language** for each recipient.

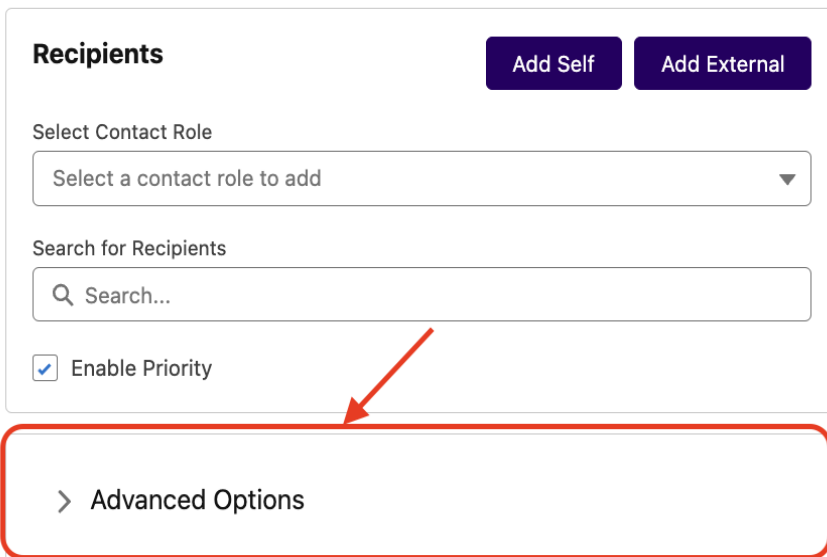
- Click on the **Role** dropdown list with the **arrow down**. There are 2 roles available: **Signer** or **Viewer**
- Click on the **Language** dropdown. There are **5 available languages** in which the request will be sent: English, Lithuanian, Latvian, Estonian, and Icelandic



## Advanced options

*Advanced Options section*



3.1 Click on the **Advanced Options** section



The **Advanced Options** section contains:


Advanced Options

**Signing Deadline**


Date: Dec 25, 2024  Time: 8:28 AM 

- Hard Deadline
- Require Qualified Signatures
- Allow Video Identification
- Allow Document Saving

Comment

Test 

Annotation Position

First Top 

**Allowed Signing Methods**

Available		Selected
BankID NO	▶	Smart-ID ▲
BankID SE	◀	Electronic ID ▼
Audkenni App		
FTN		
MiTID		
Itsme		

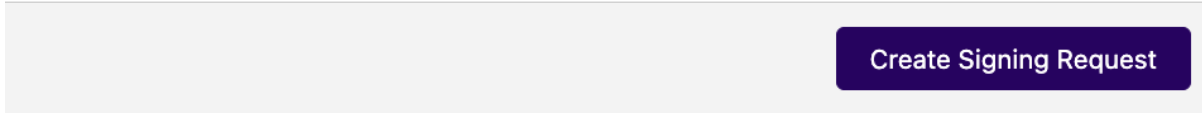
Flatten PDF

- **Signing Deadline** - Possibility to set the Date and Time of signing (*This deadline indicates the preferred date for signing the document. Users can still sign the document after this deadline has passed, but it serves as a suggested timeline*)
- **Options** (checkboxes):
  - **Hard deadline** (*This deadline is a strict cutoff. After this date, the document can no longer be signed, and the signing process will be closed*)
  - **Require Qualified Signatures** (*allows signing only by using eID tools with qualified electronic signatures.*)
  - **Allow Video Identification** (*Allows signing using video-based identification*)
  - **Allow Document Saving** (*allows users to save documents to their Dokobit Portal account*)
- **Comment** section - message for signers. It will be placed in the signing invitation.
- **Annotation position** - sets the position of signature annotations on a PDF document.
- **Allowed Signing Methods** (*allows the specification of available eID methods for signing participants*)
- **Flatten PDF** - the file will be flattened so that the form fields become part of the document content and cannot be edited after signing. This parameter is only applicable for PDF-type signing.

## Create a signing request

### 4. Create Signing Request

4.1 Click the **“Create Signing Request”** purple button to create the signing request.



# Dokobit signing requests

## Request information

### 1. Dokobit Signing Requests component

- **Name** - Request name
- **Status** - Pending, Declined, Signed
- **Created by** - who created the request
- **Created date** - when the request was created
- **Actions**

 **Dokobit Signing Requests**

	NAME	STATUS	CREATED BY	CREATED DATE	ACTIONS
>	D-0004	Signed	User User	18 Dec 2024	▼
>	D-0003	Pending	User User	18 Dec 2024	▼
>	D-0001	Declined	User User	18 Dec 2024	▼

# Actions

1.1 Click on the Action button -> the options list appears:

- **Download** - download the attached file
- **Delete** - delete the request
- **Add Recipient** - add the new recipient to the request
- **Send Reminder** - send the notification about the request
- **Update Signing** - the "Update Signing" window is opened with Advanced Options configs



## Dokobit Signing Requests

	NAME	STATUS	CREATED BY	CREATED DATE	ACTIONS
>	D-0004	Pending	User User	18 Dec 2024	▼
>	D-0003	Pending	User User	18 Dec 2024	Download
>	D-0002	Pending	User User	18 Dec 2024	Delete
>	D-0001	Declined	User User	18 Dec 2024	Add Recipient
>	D-0000	Declined	User User	18 Dec 2024	Send Reminder
					Update Signing

1.2 Click the arrow near the Name field



## Dokobit Signing Requests

	NAME	STATUS	CREATED BY	CREATED DATE	ACTIONS
>	D-0004	Pending	User User	18 Dec 2024	▼
>	D-0003	Pending	User User	18 Dec 2024	▼

- The information about the **documents** and **recipients** is displayed



## Dokobit Signing Requests

	NAME	STATUS	CREATED BY	CREATED DATE	ACTIONS
<input checked="" type="checkbox"/>	D-0004	Pending	User User	18 Dec 2024	<input type="button" value="▼"/>

### Documents



LukeSkyWalkerResume1-1

### Recipients



Luke Skywalker



**Email:**skywalker.test87@gmail.com

**Role:**Signer

**Signing Status:**Pending

# Dokobit signing flow

1. After the request is created, go to the **email** box and check the request sent to your email

1.1 Click the **“Review and sign”** button

1.2 You have been **redirected** to the document signing page

The screenshot displays the Dokobit signing interface. On the left, a PDF viewer shows a resume for Luke Skywalker. On the right, a signing invitation panel is visible. The panel includes the following elements:

- Title:** You have been invited to sign a document
- Shared by:** Nolitic (dokobit@nolitic.com)
- Powered by:** Signicat — Europe's digital identity leader and a QTSP, meeting ISO/IEC 27001 and eIDAS standards. [Learn more.](#)
- Country:** Ukraine (indicated by a dropdown menu with '1' next to it)
- Signing method:** One-Time Password via SMS (indicated by a dropdown menu with '2' next to it)
- Buttons:** Decline (with a '3' next to it) and Continue

1. Choose your **Country** (e.g., Ukraine)

2. Choose **Signing method** (e.g., One-Time Password via SMS)

3. Click on the **“Continue”** button

[The “Sign using One-Time Password via SMS” example is used here]

## Signed

The screenshot displays a web interface with a PDF viewer on the left and a sign-in form on the right. The PDF viewer shows a document titled "Luke Skywalker" with sections for "SUMMARY", "WORK EXPERIENCE", "JEDI MASTER", "REBEL LEADER", and "FARMHAND". The sign-in form is titled "Sign using One-Time Password via SMS" and includes fields for "First name", "Last name", and "Phone number", along with "Back" and "Continue" buttons. Red boxes and numbers 1 through 4 are overlaid on the form to indicate the steps for signing.

**1.** Fill in the “First name” field

**2.** Fill in the “Last name” field

**3.** Fill in the “Phone number” field

**4.** Click the “Continue” button

Enter the code you've received in **SMS**

✓ — ○ — ○

### Verify your phone number

To complete the signing process, we need to verify that the phone number "+38 [REDACTED]" belongs to you.


You'll receive an SMS with a verification code shortly that will need to be entered below.

[I cannot get the code, I want a new one.](#)

[Back](#) [Sign document](#)


✓ — ✓ — ○


### You have successfully signed the document

 **Electronic Signature**

**TEST TEST**  
2024-11-22 00:09:30 GMT+2  
Identity verified and signing consent is confirmed using One-Time Password via SMS on +380932930260

Document status:

 **Document was signed successfully.**  
1/1

Powered by  Dokobit portal is powered by Signicat — Europe's digital identity leader and a QTSP, meeting ISO/IEC 27001 and eIDAS standards. [Learn more.](#)

[Save to Dokobit portal](#)

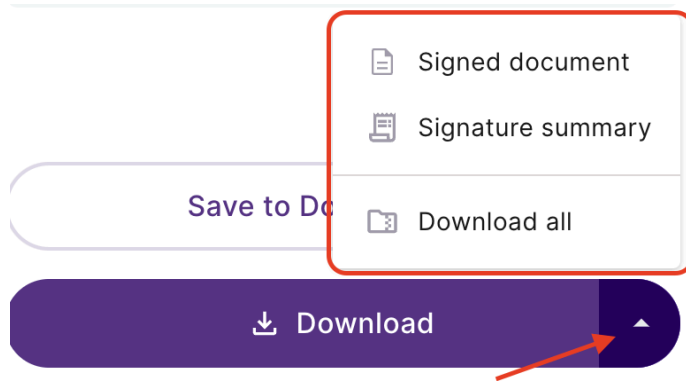
↓ Download

The **“You have successfully signed the document”** page is opened

- Pay attention to the **Electronic signature** section
- Pay attention to the **Document status** section
- You can **Save** the document to Dokobit portal or **Download** it

There are **4 ways** to download the signed documents

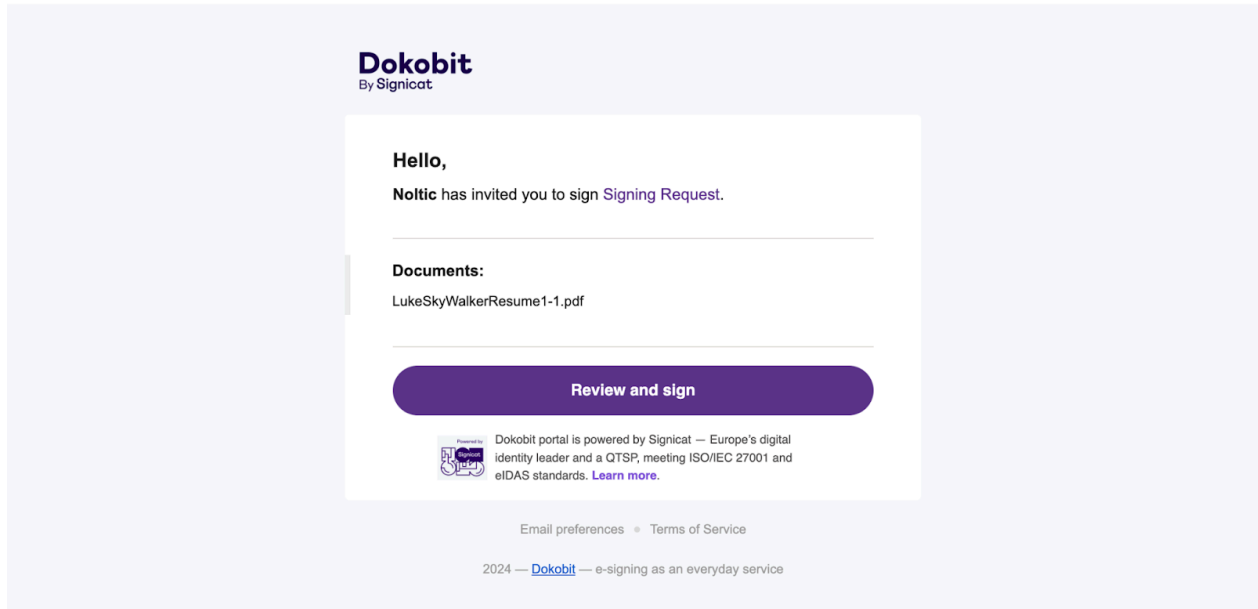
- **Download** button (main button)
- **Signed document** (button from the option list)
- **Signature summary** (button from the option list)
- **Download all** (button from the option list)



Go back to the **Object** page and **Dokobit Signing Requests** section.  
Pay attention to the **Status** of the request, it should be marked as **Signed**.

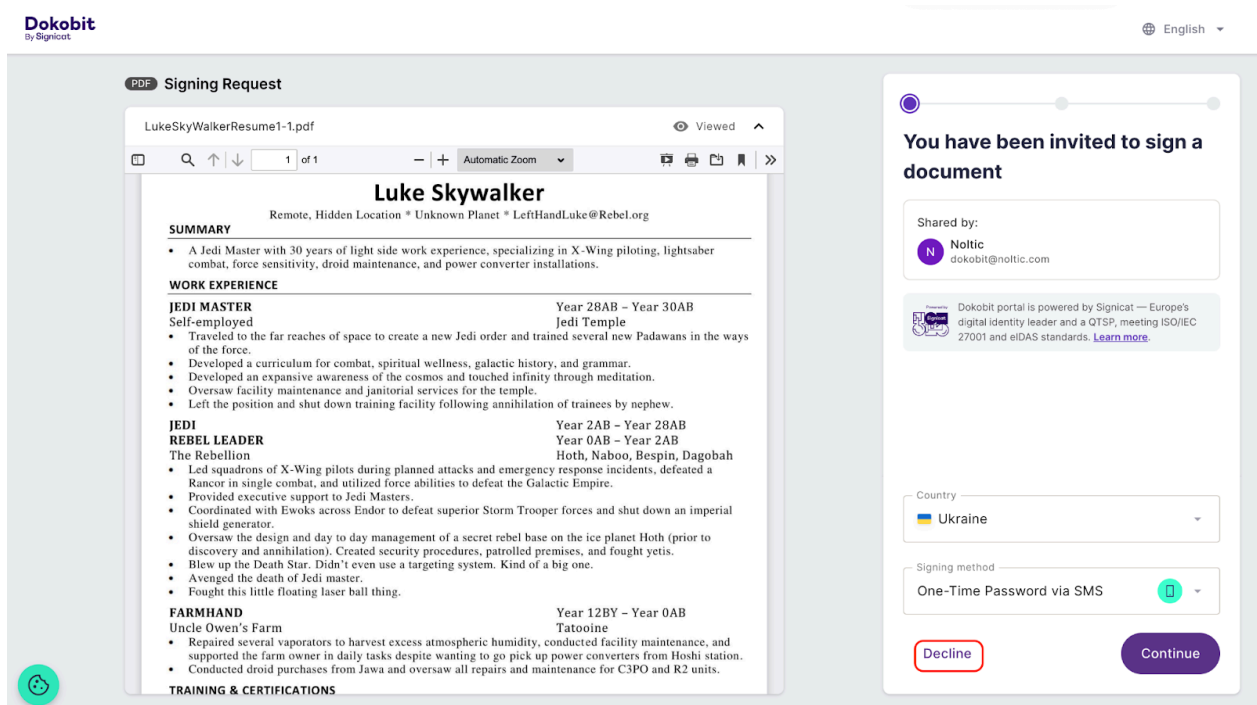
# Declined

3. Send another request or go to the **email** box and check the previous request sent to your email



3.1 Click the **“Review and sign”** button

3.2 You have been **redirected** to the document signing page

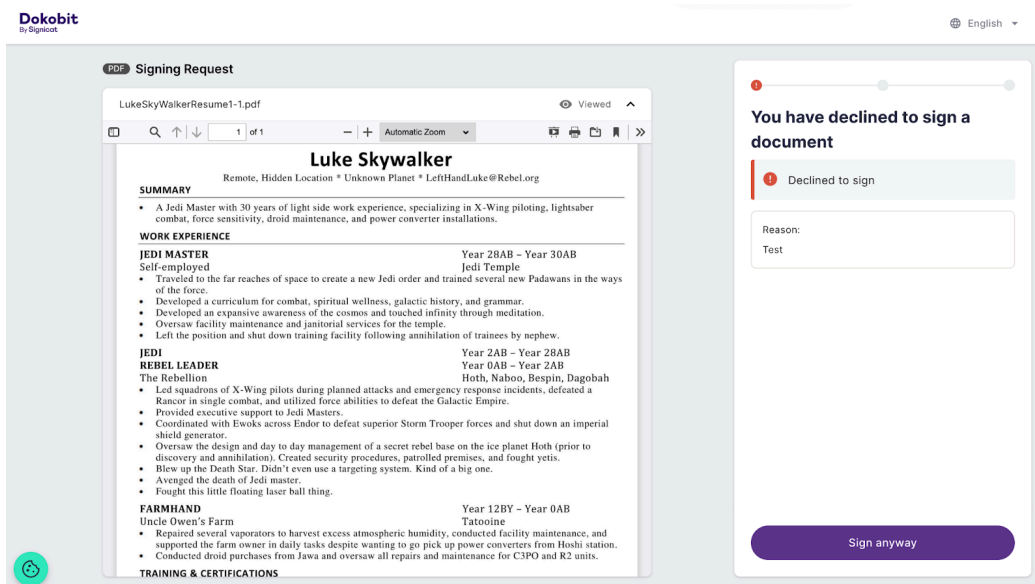


- Click on the “Decline” button


### 3.3 Fill in the reason in the “Reason” text field



### 3.4 The “You have declined to sign a document” step is opened



3.5 Go back to the **Object** page and **Dokobit Signing Requests** section. Pay attention to the **Status** of the request, it should be marked as **Declined**.


 **Dokobit Signing Requests**

	NAME	STATUS	CREATED BY	CREATED DATE	ACTIONS
>	D-0006	Pending	User User	18 Dec 2024	▼
>	D-0005	Pending	User User	18 Dec 2024	▼
>	D-0004	Signed	User User	18 Dec 2024	▼
>	D-0003	Pending	User User	18 Dec 2024	▼
>	D-0002	Pending	User User	18 Dec 2024	▼
>	D-0001	Declined	User User	18 Dec 2024	▼


3.6 Expand the **Declined** request to see the “**Decline Reason**”.

	NAME	STATUS	CREATED BY	CREATED DATE	ACTIONS
☑	D-0006	Declined	User User	1 Apr 2025	▼

**Documents**

 Agreement

**Recipients**

 Luke Skywalker ✕

**Email:** skywalker.test87@gmail.com  
**Role:** Signer  
**Signing Status:** Declined  
**Decline Reason:** Rejected by User