



# SharePoint USER GUIDE



#1 Easiest and Most Collaborative eSignature Solution

## About Foxit eSign

Foxit eSign is a robust end-to-end solution that allows businesses to send eSignature requests and complete important documents. Foxit eSign is both feature-rich and a very user-friendly application.

Quickly and effortlessly create documents/templates collaboratively and obtain eSignatures online using Foxit eSign's trusted and legally binding electronic signature software.

For more information on the Foxit eSign application, please contact us at [esignsupport@foxit.com](mailto:esignsupport@foxit.com) or visit [www.foxit.com](http://www.foxit.com).

Key features include but are not limited to:

- Agreement creation
- Reusable templates
- Document creation
- Collaboration
- Single or multiple eSignatures on documents
- Online web link distribution for eSignatures
- Bulk eSignatures
- Embedded online forms for website integration

Integrations include but are not limited to:

- Application Programming Interfaces (API)
- Salesforce
- Google Workspace
- WordPress

and thousands of integrations using Zapier.

## Foxit eSign for SharePoint

This guide outlines the integration process of Foxit eSign with SharePoint for the electronic signature use cases enabled by Foxit eSign and the steps required to achieve the core use cases.

- Send and sign or request signature from SharePoint with the Foxit eSign SharePoint integration
- See Envelope Status for each sent envelope
- Automatically backup your completed envelopes in SharePoint: Signature Certificates and completed envelopes are automatically saved to the SharePoint site in a folder.

## Installing

System Admins access is required for installation **Step 1-2**.

If you are a regular user and Step 1 and Step 2 are completed, you may start at **Step 3**.

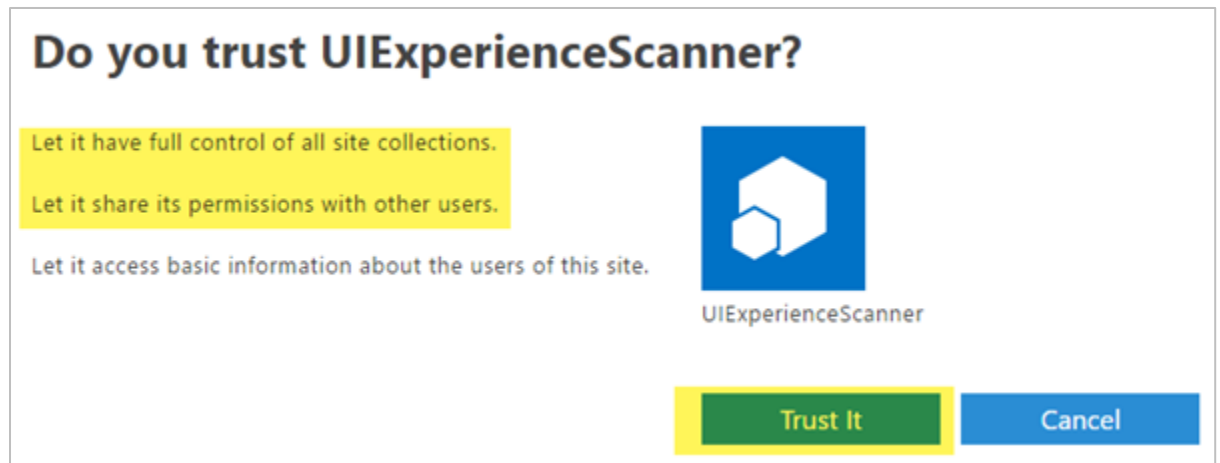
1. Generate **App-only Client ID** and **Client Secret** for SharePoint. Follow the below steps to generate the Client ID and Client Secret.
  - a. Navigate to a site in your tenant (e.g., <https://contoso.sharepoint.com>) and then call the `appregnew.aspx` page (e.g., [https://contoso.sharepoint.com/\\_layouts/15/appregnew.aspx](https://contoso.sharepoint.com/_layouts/15/appregnew.aspx)). Click on the **'Generate'** button on the below page to generate a Client ID and secret. Fill in the remaining information, as shown in the screenshot below.

The screenshot shows a form for generating an app-only client ID and secret. It contains the following fields and values:

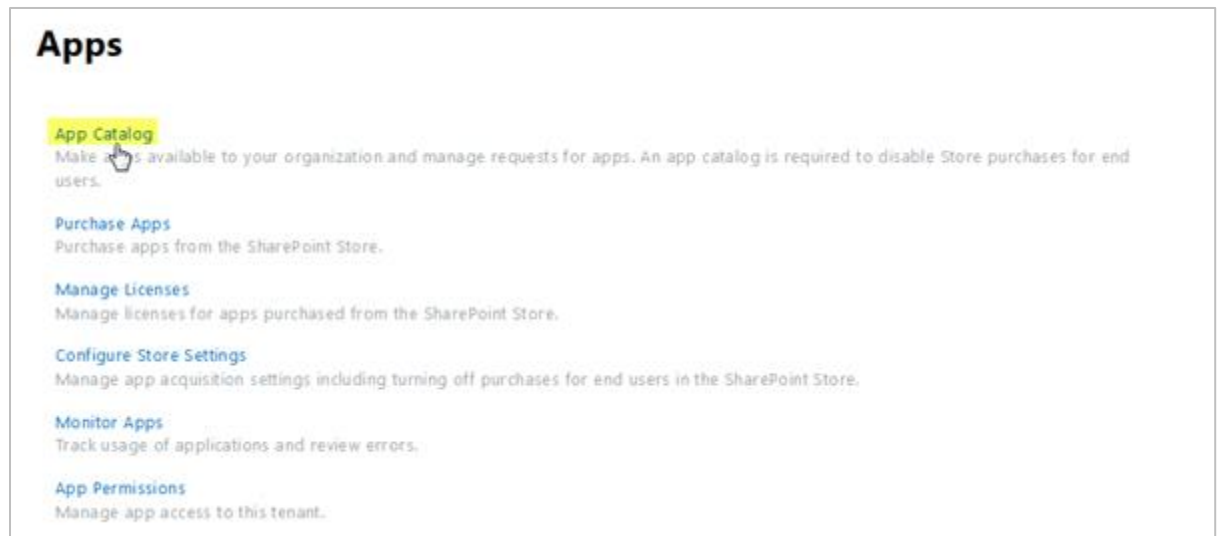
- Client Id:**
- Client Secret:**
- Title:**
- App Domain:**   
Example: "www.contoso.com"
- Redirect URI:**   
Example: "https://www.contoso.com/default.aspx"

- b. The next step is granting permissions to the newly created principal. Since we're granting tenant scoped permissions, this can only be done via the appinv.aspx page on the tenant administration site. You can reach this site via [https://contoso-admin.sharepoint.com/\\_layouts/15/appinv.aspx](https://contoso-admin.sharepoint.com/_layouts/15/appinv.aspx). Replace Contoso with your tenant's name. Once the page is loaded, add your **Client ID**, and look up the created principal:

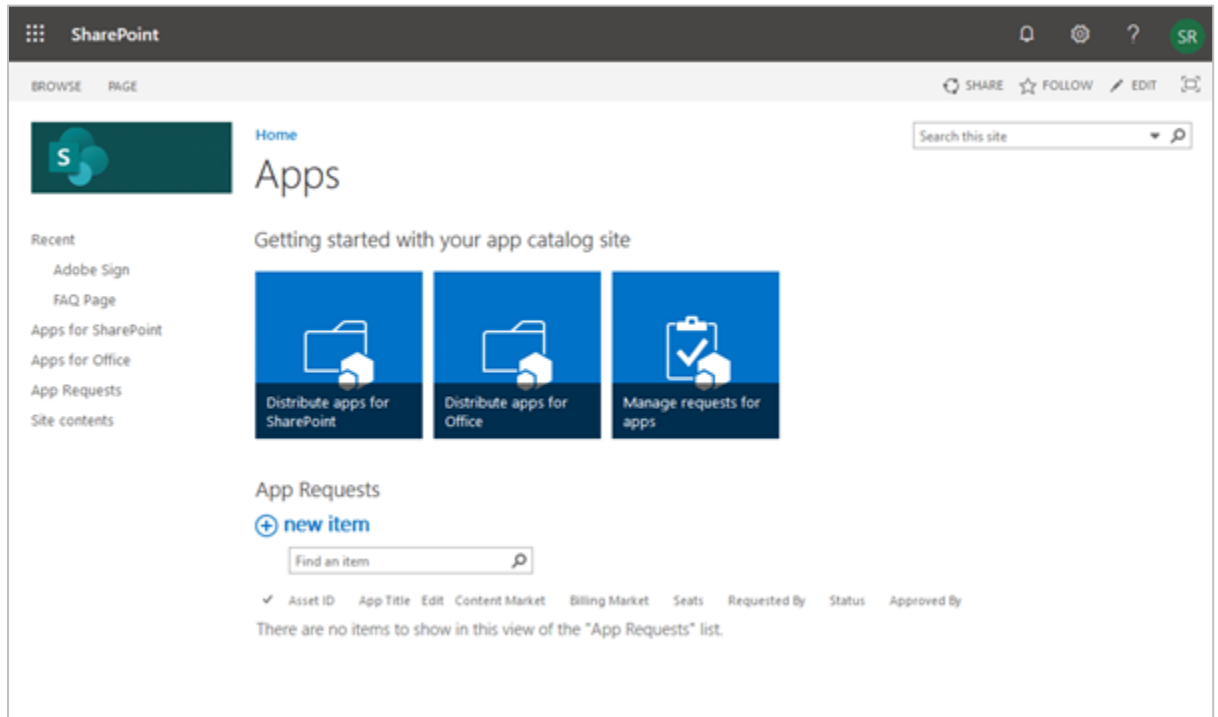
- c. To grant permissions, you will need to provide the permission XML that describes the required permissions. Since this application needs to be able to access all sites + also uses search with app-only, it needs the below permissions:
- ```
<AppPermissionRequests AllowAppOnlyPolicy="true">
<AppPermissionRequest Scope = "http://sharepoint/content/tenant" Right =
"FullControl" />
</AppPermissionRequests >
```
- d. You'll be presented with a permission consent dialog when you click on Create button. Press the **'Trust It'** button to grant the permissions:



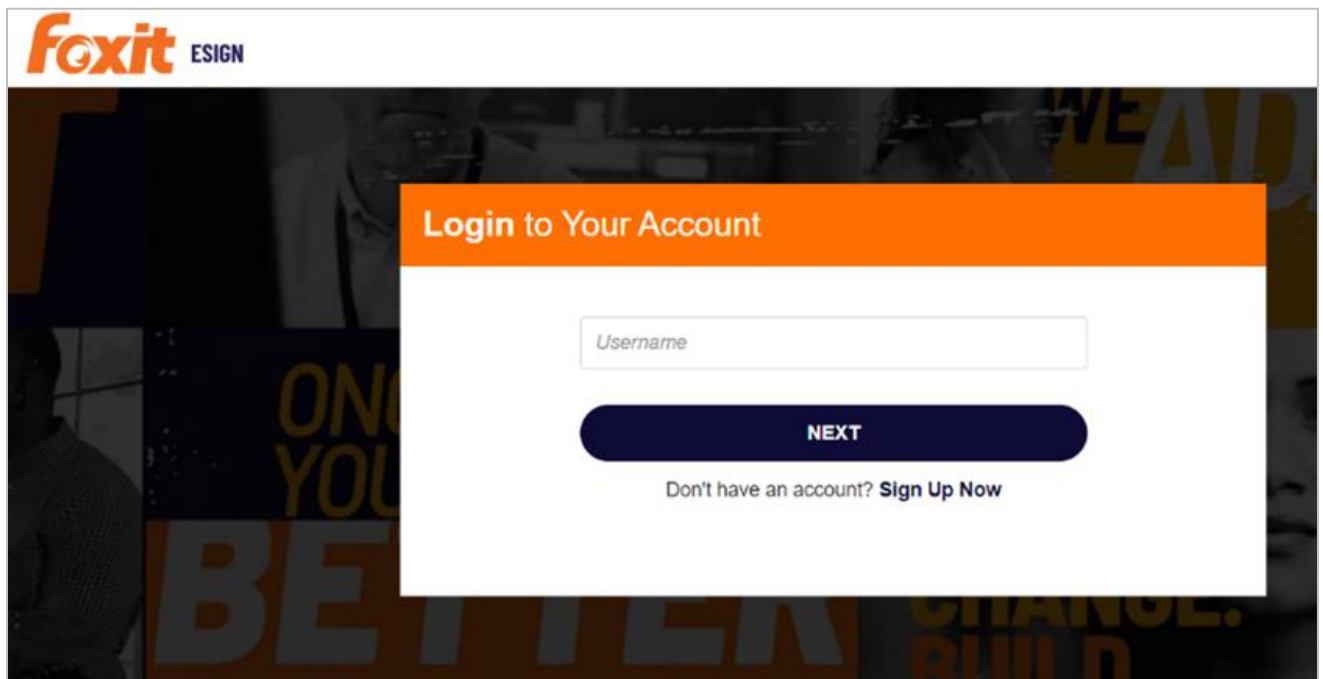
2. Get **App Catalog URL** for SharePoint tenant. Follow the Below steps to get the app catalog URL
  - a. Navigate to your Tenant Administration site, usually located at **https:// - admin.sharepoint.com**
  - b. Click on '**More Features**' in the left navigation
  - c. Click on the '**Open**' button under the Apps section
  - d. Click on the '**App Catalog**' link on the Apps page.



- e. You will be redirected to your tenant app catalog site if it's already been created. Otherwise, you'll be given the option to create an app catalog.



- 3. The installation process starts with Authentication with Foxit eSign Account. You will be redirected to the Login screen from Foxit eSign as below. Enter your account **Username** (Registered email ID with Foxit eSign):



Click on the 'Next' button.

4. After entering the Username, it will be checked whether that Username exists in the Foxit eSign account. If a User exists, then the following screen will appear where you need to provide the Password of the Foxit eSign account.

**Foxit** eSIGN

Foxit eSign for SharePoint is requesting permission to connect to your Foxit eSign account.  
Foxit eSign for SharePoint will be able to access your Foxit eSign data, but will not be able to see your Foxit eSign account password.

**Sign in**

Email ID

Password

**Sign in**

[Create New Account](#)

**Requesting application details**  
**Name :** Foxit eSign for SharePoint  
**Website :** <https://www.foxit.com/esign-pdf>  
**Description :** Sign or Send any document electronically with Foxit eSign in few seconds directly with your Drive, Docs, Sheets & Slides

Click on the 'Sign In' button.

5. After signing in, you need to provide Permission for your account by clicking on the 'Allow' button on the below screen.

**Foxit** eSIGN

Foxit eSign for SharePoint is requesting permission to connect to your Foxit eSign account.  
Foxit eSign for SharePoint will be able to access your Foxit eSign data, but will not be able to see your Foxit eSign account password.

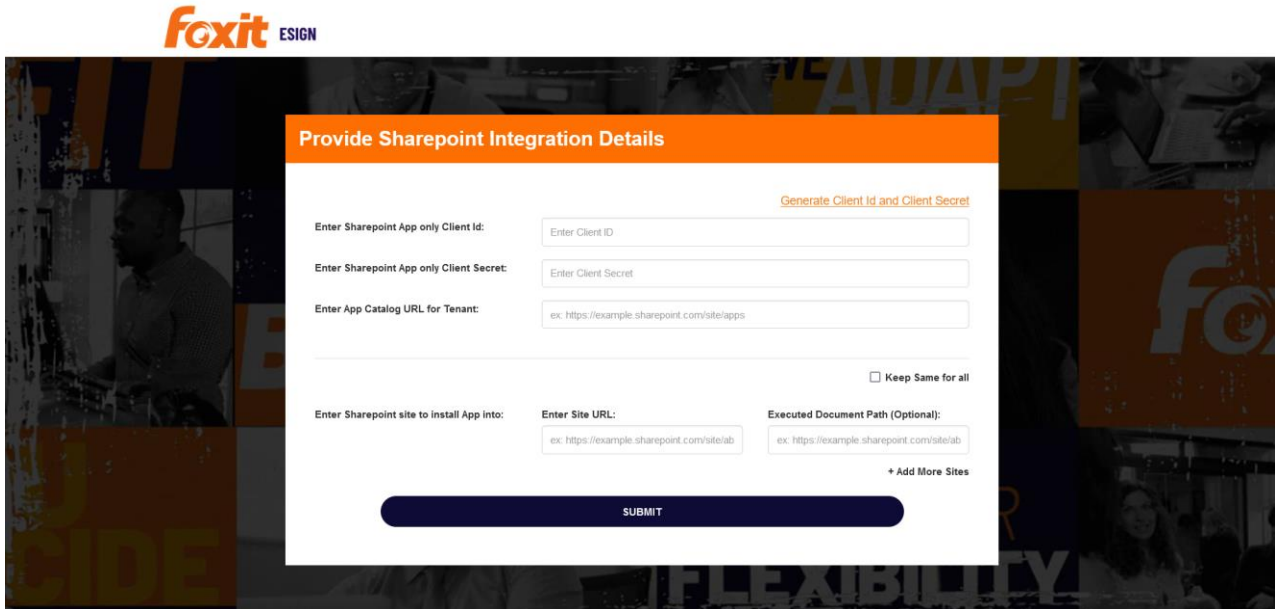
**Hi**

Click Allow if you want Foxit eSign for SharePoint to access your data from Foxit eSign.  
You can revoke access under 'Manage My Apps' in Foxit eSign by clicking 'Disconnect' next to this app name.

**Allow** **Do not allow**

**Requesting application details**  
**Name :** Foxit eSign for SharePoint  
**Website :** <https://www.foxit.com/esign-pdf>  
**Description :** Sign or Send any document electronically with Foxit eSign in few seconds directly with your Drive, Docs, Sheets & Slides

6. After allowing permissions, you will be redirected to the Details screen, where you must provide SharePoint **Client ID** and **Secret** generated in the very first step. Additionally, provide an **App catalog URL** and a list of sites to which you want to integrate this app. Users can also provide a specific path to save the executed document by entering the desired link in the “**Executed Document Path**” field. You can add up to 10 sites using the “**Add More Sites**” link.

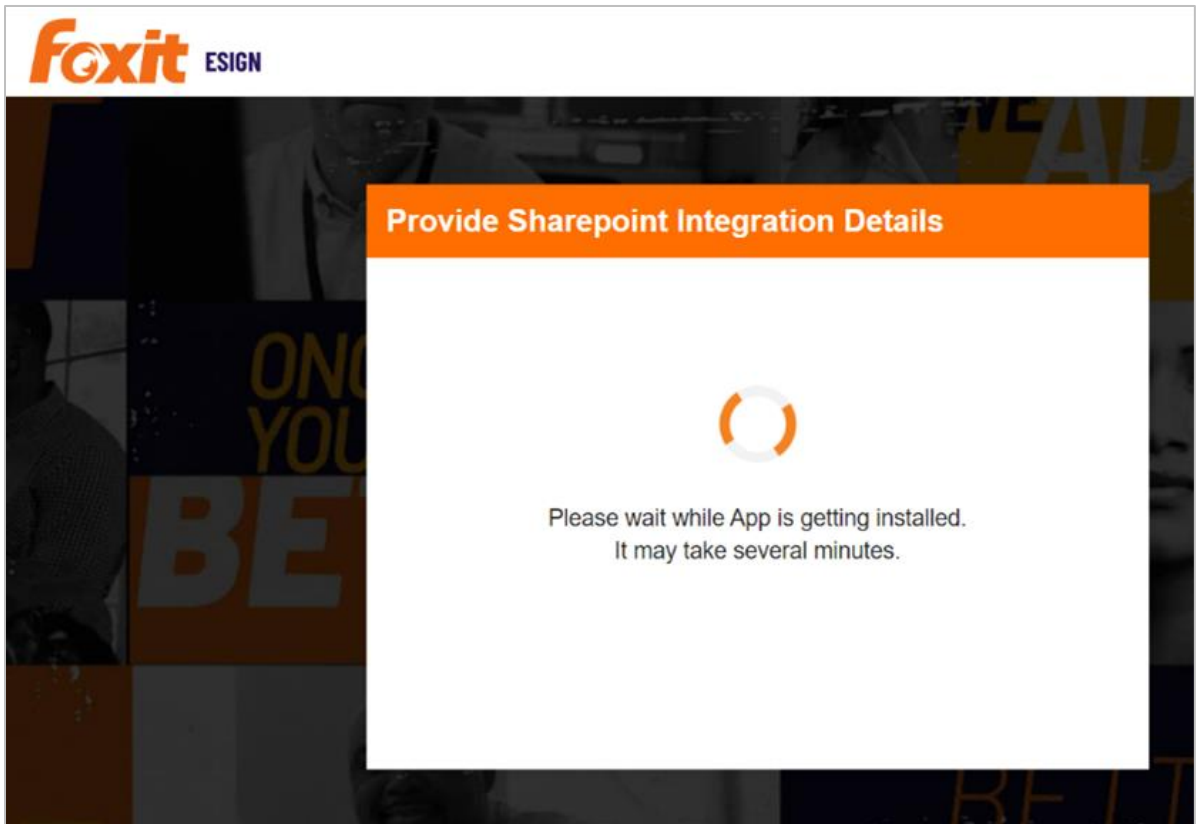


The screenshot shows a web form titled "Provide Sharepoint Integration Details" with the Foxit eSign logo at the top left. The form includes the following fields and options:

- Enter Sharepoint App only Client Id:** A text input field with a placeholder "Enter Client ID". A link "Generate Client Id and Client Secret" is located to the right of this field.
- Enter Sharepoint App only Client Secret:** A text input field with a placeholder "Enter Client Secret".
- Enter App Catalog URL for Tenant:** A text input field with a placeholder "ex: https://example.sharepoint.com/site/apps".
- Keep Same for all**
- Enter Sharepoint site to install App into:** This section contains two sub-fields:
  - Enter Site URL:** A text input field with a placeholder "ex: https://example.sharepoint.com/site/ab".
  - Executed Document Path (Optional):** A text input field with a placeholder "ex: https://example.sharepoint.com/site/ab".
- + Add More Sites** (link)
- SUBMIT** (button)

7. Once you ‘**Submit**’ your details, installing the app on your mentioned sites will take a few minutes. The below screen will appear while installation is in progress.





8. Once installation is done successfully, you will get the below screen.

