



e-Signatures – AssureSign User Guide for MS CRM 2015/2016 and Dynamics 365

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e-Signatures AssureSign User Guide
(How to work with e-Signatures for MS CRM 2015/2016 and Dynamics 365)

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Preamble

This documentation is intended to guide you through the usage of e-Signatures made with AssureSign in Microsoft Dynamics 365 (CRM).



e-Signatures require the installation of DocumentsCorePack. For further information on DocumentsCorePack, have a look at our [documentation](#) on DocumentsCorePack or get your free trial version of the product [here](#).

Target Audience

This guide is intended for users who have DocumentsCorePack in use and have the following minimum skills

- Basic Microsoft Dynamics 365 (CRM) knowledge

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

Purpose of e-Signatures?

DocumentsCorePack offers the possibility to use e-Signatures as an additional feature, supported by AssureSign as an additional feature, which simplifies the world of e-Signatures. The tool empowers you to electronically sign documents.

Benefit from the combination and take the usability of Microsoft Dynamics 365 (CRM) to a whole new level.

1 Optional DocumentsCorePack Feature: AssureSign

DocumentsCorePack offers the possibility to use AssureSign as an additional feature. AssureSign simplifies the world of e-signatures. It is a tool that empowers you to electronically sign documents.

Benefit from this combination and take the usability of Microsoft Dynamics CRM to a whole new level.

In case you decide to use AssureSign as an additional feature, please follow the steps in this part of the documentation:

- [CREATE AN ASSURESIGN ACCOUNT](#)
- [INSTALL ASSURESIGN IN CRM](#)
- [SETUP ASSURESIGN TO WORK CORRECTLY IN CRM](#)

For more Information about how to install and setup AssureSign for Dynamics CRM please follow the [Installation-Guide from AssureSign](#).

1.1 How to work with AssureSign in DocumentsCorePack

To work with AssureSign, DocumentsCorePack needs some AssureSign-templates.



These AssureSign-templates do have nothing in common with our DocumentsCorePack-templates!

AssureSign-templates are defining how AssureSign should work with DocumentsCorePack-templates, like who is getting the emails and when and how AssureSign *detects* the Fields (and Data) in a DocumentsCorePack-template.

At the moment, DocumentsCorePack cannot create them dynamically for you during the merging-process, so you have to import some *Dummy-AssureSign*-templates before DocumentsCorePack can merge (and send) any document.



DocumentsCorePack needs an AssureSign-Template responding to the number of signers.

So, if there

is 1 signer, DocumentsCorePack needs an AssureSign-Template called "mscrmAddons_1Signer",
are 2 signers, DocumentsCorePack needs an AssureSign-Template called "mscrmAddons_2Signer",
are 3 signers, DocumentsCorePack needs an AssureSign-Template called "mscrmAddons_3Signer".

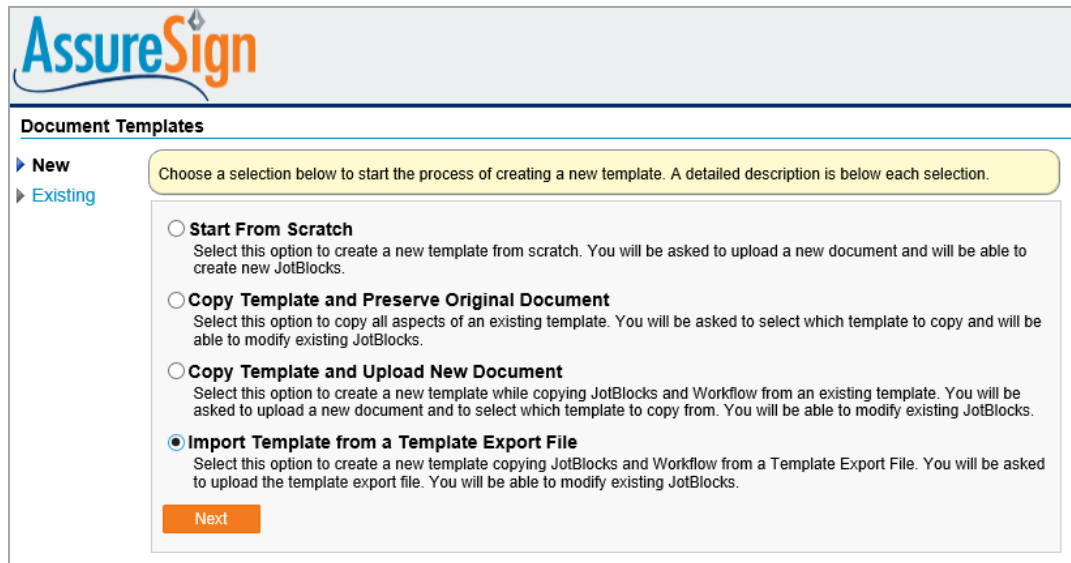
Please follow [this link](#) and download the *AssureSignTemplates.zip*.

The file includes 3 files, which means you can use up to 3 signers in AssureSign.

1.1.1 How to import the AssureSign templates

The import of AssureSign templates requires only a few short steps which are to be explained in the following chapter.

- 1) Expand the files into a Temp-Folder.
- 2) Login to your AssureSign Homepage and change to *templates*.



AssureSign

Document Templates

► **New**
► Existing

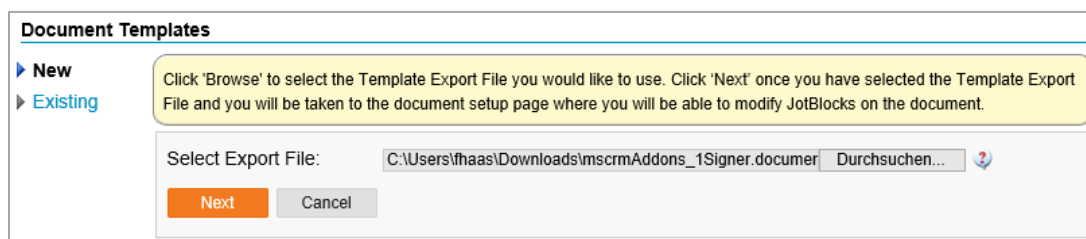
Choose a selection below to start the process of creating a new template. A detailed description is below each selection.

- ☐ **Start From Scratch**
Select this option to create a new template from scratch. You will be asked to upload a new document and will be able to create new JotBlocks.
- ☐ **Copy Template and Preserve Original Document**
Select this option to copy all aspects of an existing template. You will be asked to select which template to copy and will be able to modify existing JotBlocks.
- ☐ **Copy Template and Upload New Document**
Select this option to create a new template while copying JotBlocks and Workflow from an existing template. You will be asked to upload a new document and to select which template to copy from. You will be able to modify existing JotBlocks.
- ☒ **Import Template from a Template Export File**
Select this option to create a new template copying JotBlocks and Workflow from a Template Export File. You will be asked to upload the template export file. You will be able to modify existing JotBlocks.

Next

Figure 1: AssureSign – Documents Templates

- 3) Select the *New*-tab and *Import Template from a Template Export File*. Then click on the **[Next]**-button.



Document Templates

► **New**
► Existing

Click 'Browse' to select the Template Export File you would like to use. Click 'Next' once you have selected the Template Export File and you will be taken to the document setup page where you will be able to modify JotBlocks on the document.

Select Export File: C:\Users\thaaas\Downloads\mscrmAddons_1Signer.documer **Durchsuchen...**

Next **Cancel**

Figure 2: AssureSign – Add new template

- 4) Select the *mscrmAddons_1Signer.documentTemplate*-file from your Temp-Folder, where you have expanded the .zip-file before.

Again, click on the **[Next]**-button.



Do not change the name of the template, because DocumentsCorePack is searching for this template!

Document Templates >> Import Template from a Template Export File

▶ **New**
▶ Existing

To create a new template from the selected Template Export File, please provide a name for the template that can be used to clearly identify it. You must also choose who will be able to access and use this template. Once this is complete, please click 'Next' to continue.

Template Name: ?

Description (optional): ? 0 / 250 characters

Accessibility: ?

Language: ?

Email Design Set:

The template you are importing references an email design set which does not exist in your environment. You may choose to import this new design set or you may select a different design set in your environment and the imported template will be updated to use default notifications for the selected design set.

 ?

Modify Workflow Template? ☒ Yes ☐ No ?

Lock this Template? ☐ Yes ☒ No ?

[+ Show Advanced Options](#)

Figure 3: Customize accessibility

- 5) Customize the *accessibility* (we recommend to access via *Account*).
Click on the **[Next]**-button.

Workflow Template

▶ **1. Signatories**
▶ 2. Signing Process
▶ 3. Emails
▶ 4. Web Notifications
▶ 5. Document
▶ Transmission
▶ Review

Please define signatories for the document.
Now you can set up a new signatory by clicking the 'New' link below or you can begin defining who is assigned to each signing step by clicking on the 'Next' button below.

	Signatory Name	Email Address
New		
Edit	[Signatory 1 Full Name]	[Signatory 1 Email Address]

Figure 4: Define signatories



Do not change the name of the template, because DocumentsCorePack is searching for this template!

- 6) Now please click on the **[Next]**-button.
- 7) Accept the Points 2 to 5 by clicking on the **[Next]**-button.
- 8) Finally, at Step 6 press the **[Finish]**-button in order to finish the process.

Congratulations! You have successfully imported the AssureSign-Template for 1 Signer!

Please repeat the Points above to import the "mscrmAddons_2Signer" and "mscrmAddons_3Signer" AssureSign-Templates.

2 DocumentsCorePack templates for AssureSign (1 signer)

After you have imported the AssureSign templates (for further information, please see [CHAPTER 1.1.1 HOW TO IMPORT THE ASSURESIGN TEMPLATES ON PAGE 6](#)), you must create a DocumentsCorePack template for AssureSign. This chapter outlines how to create such a template for one signer.

Please find an example contract template with some inserted fields below.

Contract

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim.

Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede.

Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet nonummy augue.

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede.

Name: <<name>>

Signer:

Email: <<ASText2>>

Forename: <<ASText4>>

Surname: <<ASText5>>

<<ASSignature3>>

Signature

Figure 5: Example contract template with inserted AssureSign fields

2.1 How to create a DocumentsCorePack template for AssureSign (1 signer)

To be able to insert fields into Microsoft Word documents, you must use the DocumentsCorePack TemplateDesigner. To do so, please insert the Insert MailMerge Fields in the www.mscrm-addons.com-tab of the Word document you wish to create your DocumentsCorePack template for AssureSign for 1 signer with. Please find all the information about how to use the Template Designer in the [Template Designer User Guide](#) on our website.

First of all, open the **[Insert MailMerge Fields]**-button in the command bar of the www.mscrm-addons.com tab of your Word document. Position your cursor in the Word document at the place where you want the future signature field to be.

Next, open the drop down menu of the **[Insert Field]**- button in the DocumentsCorePack TemplateDesigner.

1

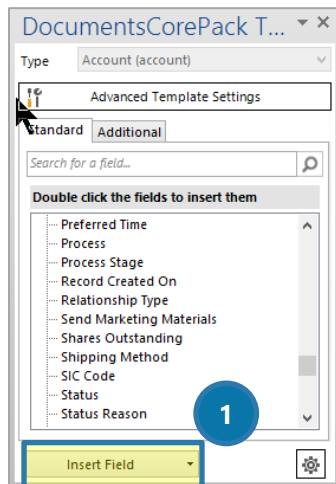


Figure 6: DocumentsCorePack Template Designer

Then, select the **Insert AssureSign Item > Text** 2

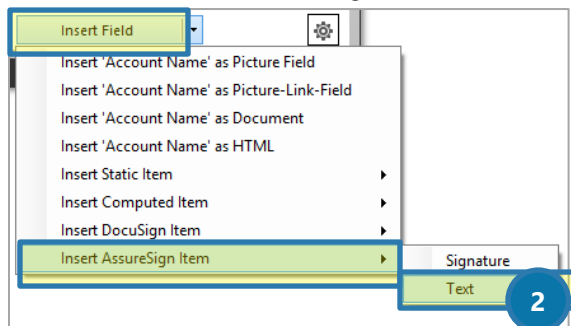


Figure 7: Insert AssureSign Item > Text

Please notice, that at the position of your cursor in the Word document, a field like this one will be visible now: <<ASText2>>

AS stands for AssureSign

Text (or *Signature*) for the Type of the AssureSign-Field

2 stands for the next number. (We need this number to make every AssureSign-field unique.)

2.2 How to set the properties of an AssureSign field

Aside from the position of the field, you can also assign several properties to the AssureSign fields.

This is only possible when you have already inserted such a field. Please find a brief description on how to insert an AssureSign field into a DocumentsCorePack template in [CHAPTER 2.1 HOW TO CREATE A DOCUMENTSCOREPACK TEMPLATE FOR ASSURESIGN \(1 SIGNER\) ON PAGE 10](#).

However, to assign some properties to an AssureSign field, please click on the inserted field in the template in order to select it.



Figure 8: Selected AssureSign field

Next, click on the **[Field Properties]**-button in the www.mscrm-addons.com-tab in your Word document in order to open the AssureSign Properties Window. This window enables you to set all the important properties for AssureSign.



Because you can select between Text and Signature fields when inserting an AssureSign Field, there are also two different kinds of Field Properties: one for the *Text*-type and one for the *Signature*-type.

Please find a brief instruction of Field Properties functionalities for the *Text*-type in [CHAPTER 2.2.1 ASSURESIGN PROPERTIES-WINDOW FUNCTIONALITIES \(FOR THE TEXT-TYPE\) ON PAGE 13](#).

Please find a brief instruction of the Field Properties functionalities for the *Signature*-type in [CHAPTER 2.2.2 ASSURESIGN PROPERTIES-WINDOW FUNCTIONALITIES \(FOR THE SIGNATURE-TYPE\) ON PAGE 15](#).

2.2.1 AssureSign Properties-window functionalities (for the *Text*-type)

Most of the properties in this window are the same as the Jot Blocks you can set when you directly create a document in AssureSign. These properties affect the document when signing it in AssureSign.

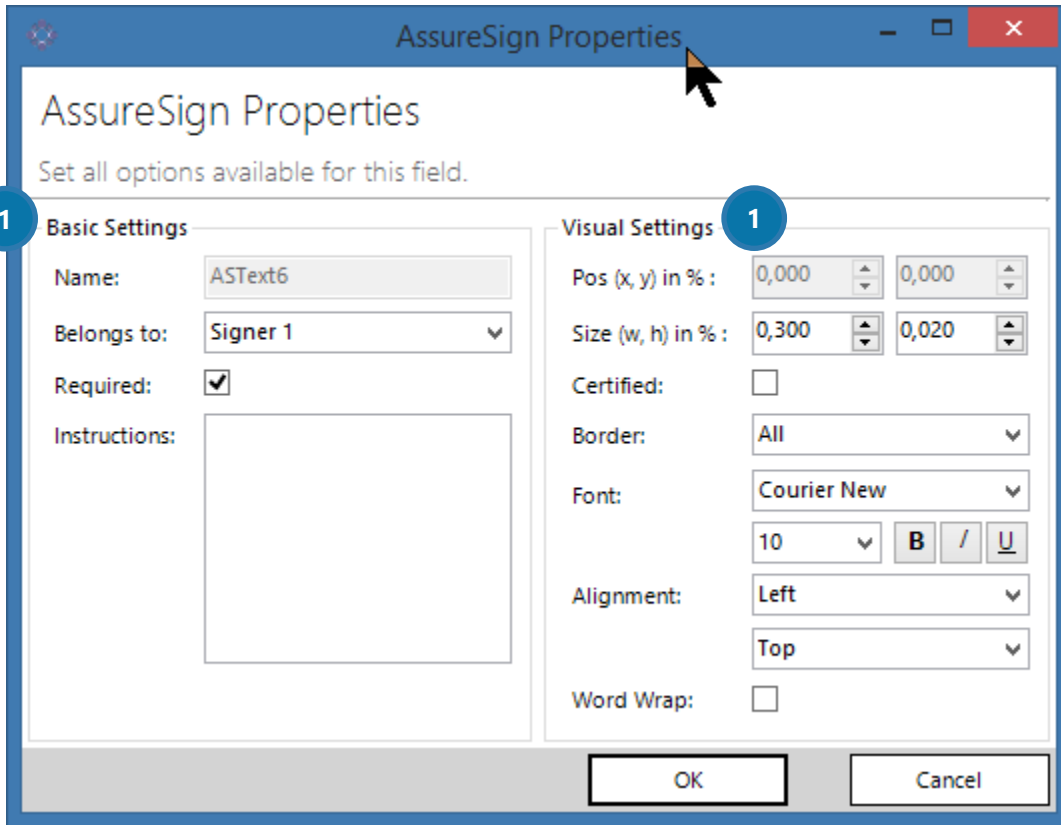


Figure 9: AssureSign Properties-window functionalities (for the *Text*-type)

1 BASIC SETTINGS

NAME

Is the field-name in the DocumentsCorePack template.

BELONGS TO

Enables you to switch between different signers. Because there could be more than one signer, you need the possibility to switch between them. All possible signers will be shown here (even if in this example, it is only one). To add a new one or to delete the last one, simply use the corresponding entry.

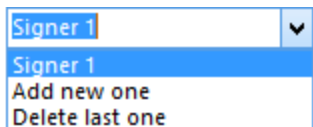


Figure 10: Select, add or delete signer

REQUIRED

The fields must be filled by the signer if the *Required*-box has been checked.

INSTRUCTIONS

Please insert the instruction text that will be shown in AssureSign here.

2 VISUAL SETTINGS

POS (X, Y) IN %

Basically, the positions of the DocumentsCorePack fields in your DocumentsCorePack template are to be set here – but the feature has not been implemented yet.

SIZE (W, H) IN %

Usually, the predefined values from DocumentsCorePack should bring a good result here. But you can as well customize the Width (W) and Height (H).



The AssureSign application will enforce a minimum height and width in order to ensure that all elements match correctly into the document.

Width (W) must be a value between 0 and 1. This is calculated as the ratio of the width of the Jot Block to the overall width of the visible portion of the page in pixels: $WIDTH = [JOT\ BLOCK\ WIDTH] / [PAGE\ WIDTH]$

Height (H) must be a value between 0 and 1. This is calculated as the ratio of the height of the Jot Block to the overall height of the visible portion of the page in pixels: $HEIGHT = [JOT\ BLOCK\ HEIGHT] / [PAGE\ HEIGHT]$

CERTIFIED

A certified Jot Block visually distinguishes from other Jot Blocks. In order to certify a Jot Block simply check the *Certified* box.

Printed *meta-data* appears embedded around the signature data. This *meta-data* includes an *electronically signed* statement, a date/time stamp, an IP-address stamp and an internal Jot Block ID. If *Certified* is selected, the border will be set to *All*.

BORDER

Will create a thin black border either beneath the Jot Block if set to *bottom* or on all sides if set to *all*.

FONT

Will set the font properties

Alignment

Will set the alignments of the field.

Horizontal values are *left*, *center* or *right*.

Vertical values are *top*, *center* or *bottom*.

Word Wrap

Will wrap/unwrap the content

2.2.2 AssureSign Properties-window functionalities (for the *Signature*-type)

The Signature-type field basically contains the same functions as the Text field.

Plus, it offers one more functionality in the Visual Settings area.

INK COLOR

Can be changed from black to blue.

3 Tutorials ("How To's")

This chapter provides you with helpful tutorials that show you how to work with AssureSign and/or DocumentsCorePack efficiently.

3.1 How do I merge a document in order to send it to AssureSign for 1 signer? (DocumentsCorePack side)

Open an account in Microsoft Dynamics 365 (CRM) and click on the **[Create Document]**-Button. This action opens the DocumentsCorePack (DCP) Dialog. For further information on the DocumentsCorePack Dialog, please have a look at the [DocumentsCorePack ServerBased documentation](#). Basically, the dialog allows you to select templates, like for example an AssureSign template.

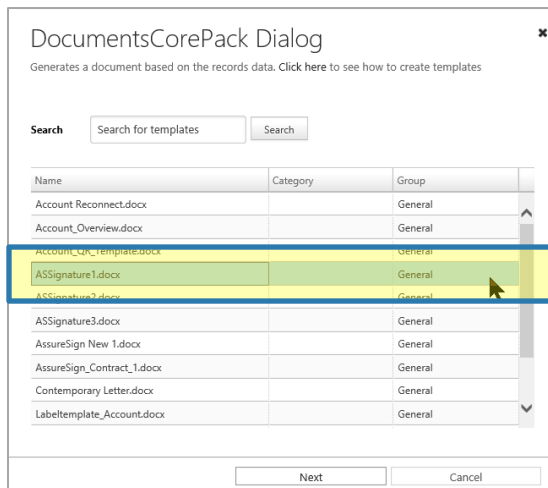


Figure 11: DocumentsCorePack dialog – Select an AssureSign template

Once you have selected a template, click on the **[Next]**-button. If you want to change the eMail recipient, you can do so here:

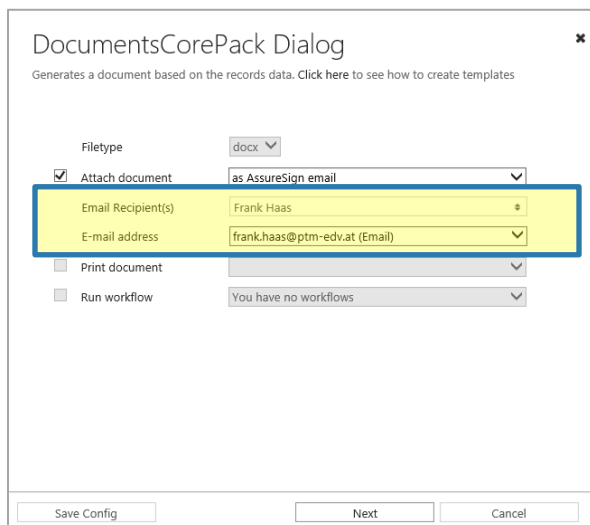


Figure 12: DocumentsCorePack dialog – Change eMail receipient

Finally, click on the **[Next]**-button and the document will be merged. You can re-check it here, before you send it to AssureSign.

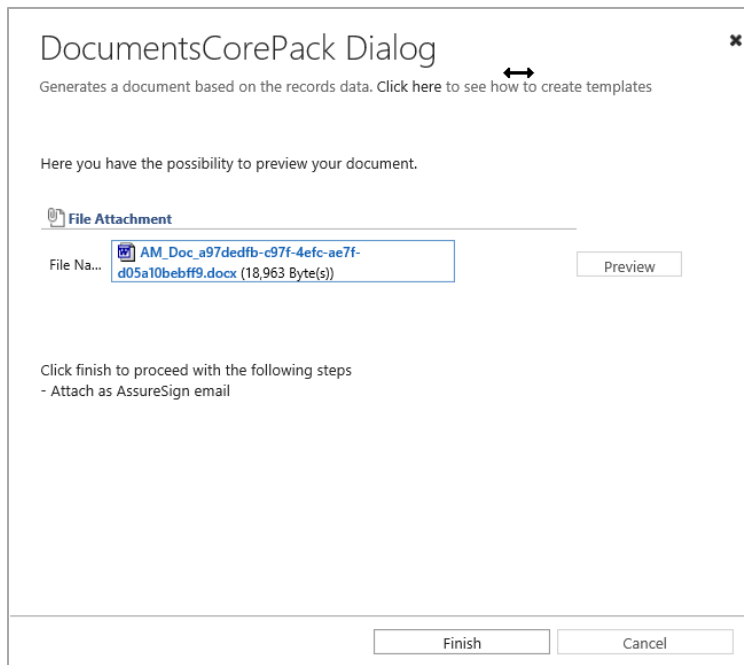


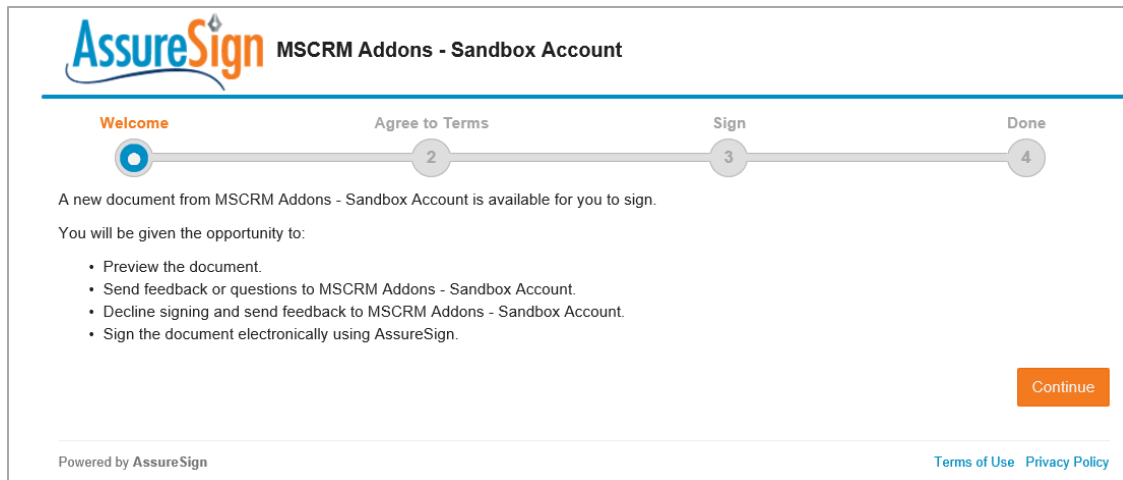
Figure 13: DocumentsCorePack dialog – Finish process

In order to finish, press the corresponding button and the document will be sent to AssureSign.

3.2 How do I merge a document and sent it to AssureSign for 1 signer? (AssureSign side)

This part shows how you or your customers/business partners can sign a document right within AssureSign. Everyone that should sign a paper via AssureSign receives an email that there is a document waiting for a signature.

In order to sign that particular document, you must open the link in the email you have received from AssureSign. Please agree to the terms and conditions and click on the **[Continue]**-button.



AssureSign MSCRM Addons - Sandbox Account

Welcome Agree to Terms Sign Done

A new document from MSCRM Addons - Sandbox Account is available for you to sign.

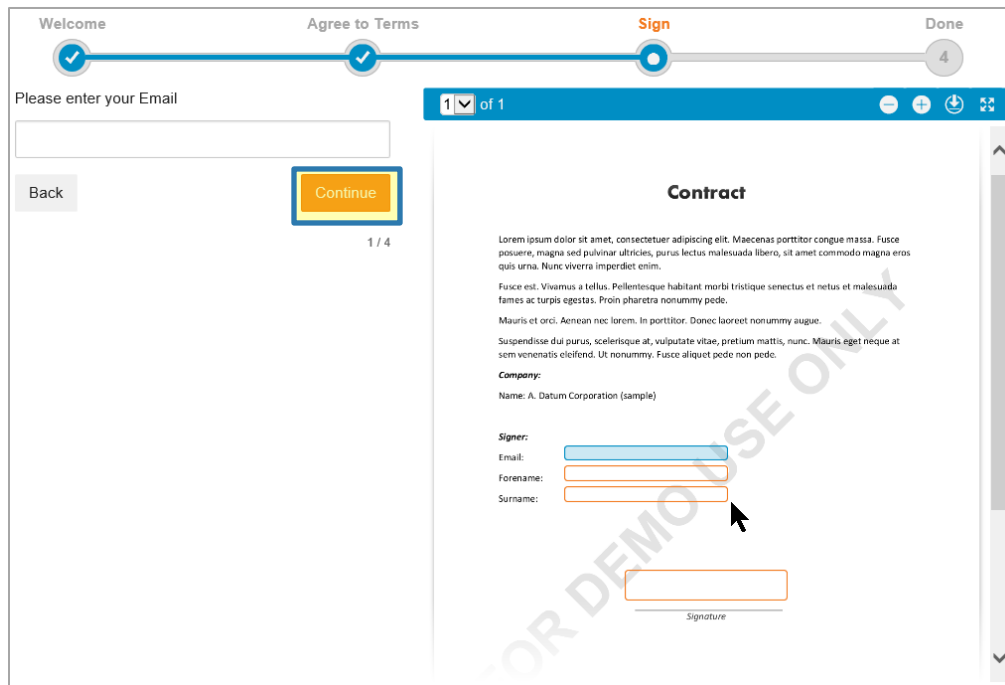
You will be given the opportunity to:

- Preview the document.
- Send feedback or questions to MSCRM Addons - Sandbox Account.
- Decline signing and send feedback to MSCRM Addons - Sandbox Account.
- Sign the document electronically using AssureSign.

[Continue](#)

Powered by AssureSign [Terms of Use](#) [Privacy Policy](#)

Figure 14: AssureSign signature process – agree to terms & conditions



Welcome Agree to Terms **Sign** Done

Please enter your Email

[Back](#) [Continue](#)

1 / 4

Contract

1 of 1

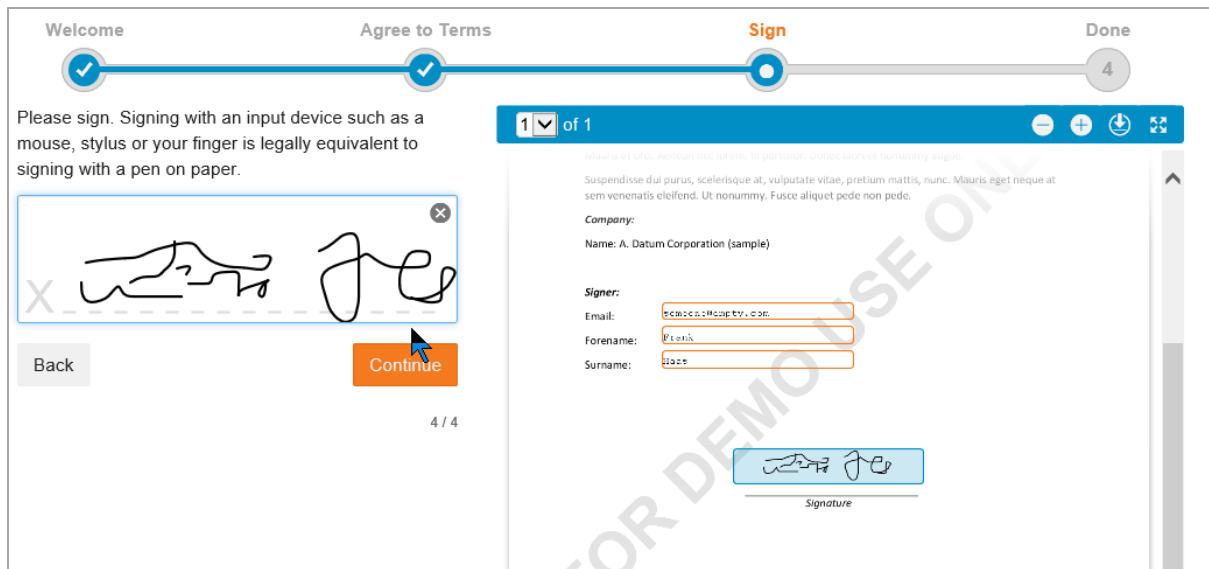
FOR DEMO USE ONLY

Signature

Figure 15: AssureSign signature process – fill out fields

Fill out each field. Please press on the **[Continue]**-button at the left side in order to jump from field to field.

Finally, sign the document.



The screenshot shows the 'Sign' step of the AssureSign process. At the top, a progress bar indicates four steps: 'Welcome' (completed), 'Agree to Terms' (completed), 'Sign' (current step), and 'Done' (4). Below the progress bar, a message states: 'Please sign. Signing with an input device such as a mouse, stylus or your finger is legally equivalent to signing with a pen on paper.' To the left, a signature box contains a handwritten signature and a 'Continue' button. To the right, a document preview shows the following text:

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede.

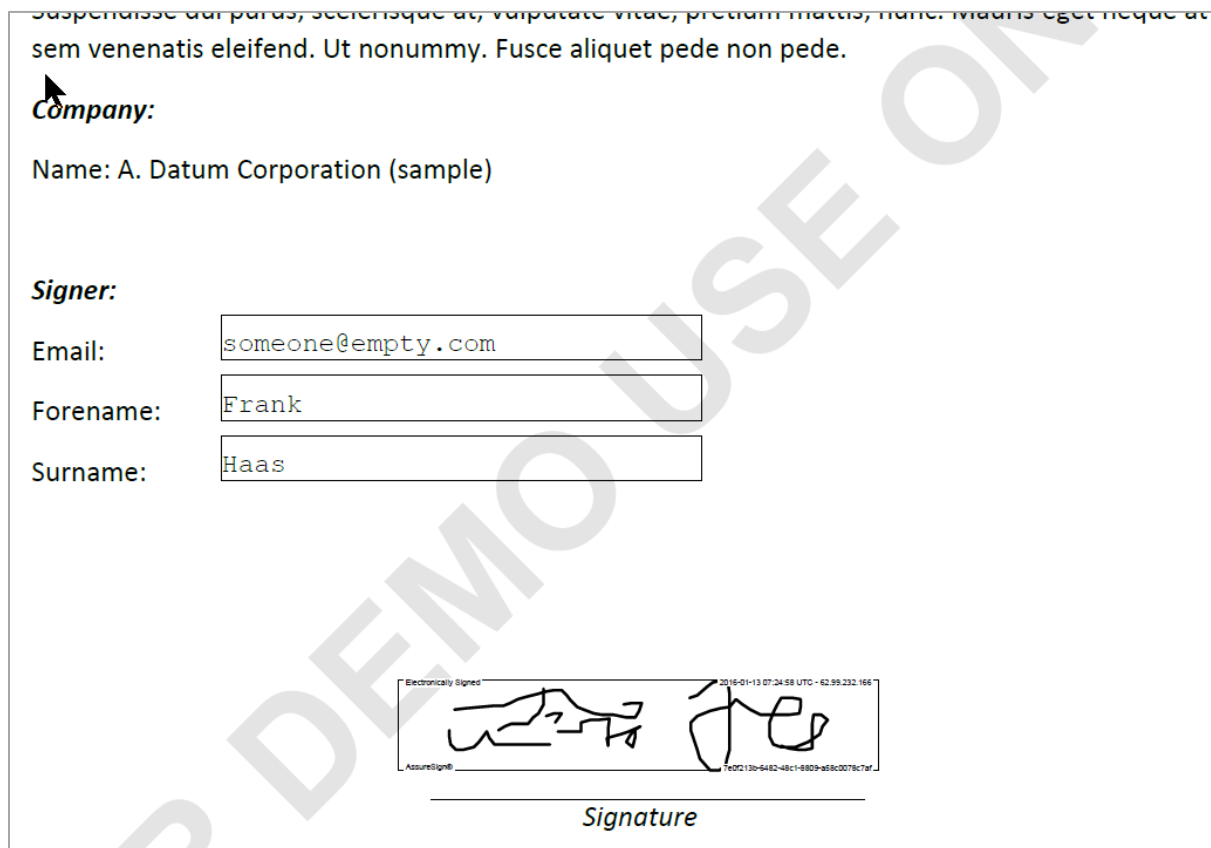
Company:
Name: A. Datum Corporation (sample)

Signer:
Email:
Forename:
Surname:

Below the form fields, a signature box shows a preview of the signature and the label 'Signature'.

Figure 16: AssureSign signature process – sign document

You will also get an email including the signed document.



The screenshot shows the 'signed document' view. It displays the same document text as Figure 16, followed by the company and signer information. The signature box now shows a preview of the signed document with the following details:

Electronically Signed
2016-01-13 07:24:58 UTC - 62.99.232.166
AssureSign®
7e0c13b-6482-48c1-8809-a56c0078c7af

Below the signature box, the label 'Signature' is displayed.

Figure 17: AssureSign signature process – signed document

3.3 How do I create a DocumentsCorePack template for AssureSign for 2 signers?

Imagine, you would like to create a DocumentsCorePack-Template for AssureSign for two signers. Let us pretend, you wanted to make sure that the person who has revised a certain document, has the possibility to sign it.

To do so, add some text at the end of the document and insert an AssureSign-Field type *Text* and another one with the type *Signature*.

The figure shows a document template layout. At the top, there is a placeholder for a signature field: `<<ASSignature3>>` followed by a horizontal line and the word *Signature*. Below this, on the left, is the text **Reviewed by:**. To its right is a placeholder for a text field: `<<ASText6>>`. Below the text field placeholder is another placeholder for a signature field: `<<ASSignature7>>`. Two blue arrows point from the `<<ASText6>>` placeholder to the `<<ASSignature7>>` placeholder, indicating a flow or relationship between the two fields.

Figure 18: AssureSign signature process – template with

Now click on `<<ASText6>>` and open the properties-window with a click on *fields properties*. The default settings appear. For more information on the AssureSign properties, please have a look at [CHAPTER 2.2 HOW TO SET THE PROPERTIES OF AN ASSURESIGN FIELD ON PAGE 12.](#)

The figure shows the 'AssureSign Properties' dialog box. The title bar says 'AssureSign Properties'. The main title is 'AssureSign Properties'. Below the title is the text 'Set all options available for this field.' The dialog is divided into two main sections: 'Basic Settings' and 'Visual Settings'. In the 'Basic Settings' section, there are fields for 'Name' (set to 'ASText6'), 'Belongs to' (set to 'Signer 1'), 'Required' (checked), and 'Instructions' (a text area). In the 'Visual Settings' section, there are fields for 'Pos (x, y) in %' (set to 0,000), 'Size (w, h) in %' (set to 0,300 and 0,020), 'Certified' (unchecked), 'Border' (set to 'All'), 'Font' (set to 'Courier New'), 'Alignment' (set to 'Left'), and 'Word Wrap' (unchecked). At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Figure 19: AssureSign signature process – AssureSign properties

Open the *Belongs to* – list box and select *Add new one...*

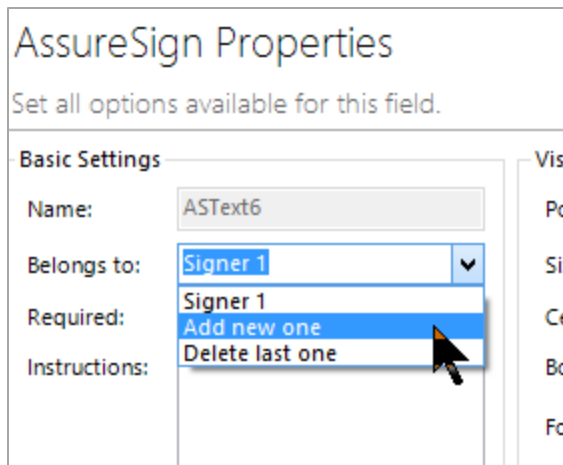


Figure 20: AssureSign signature process – Belongs to-box

Signer 2 will be created and selected.



Figure 21: AssureSign signature process – Belongs to-box Signer 2

Now open the properties of the Signature-field and select *Signer 2*.

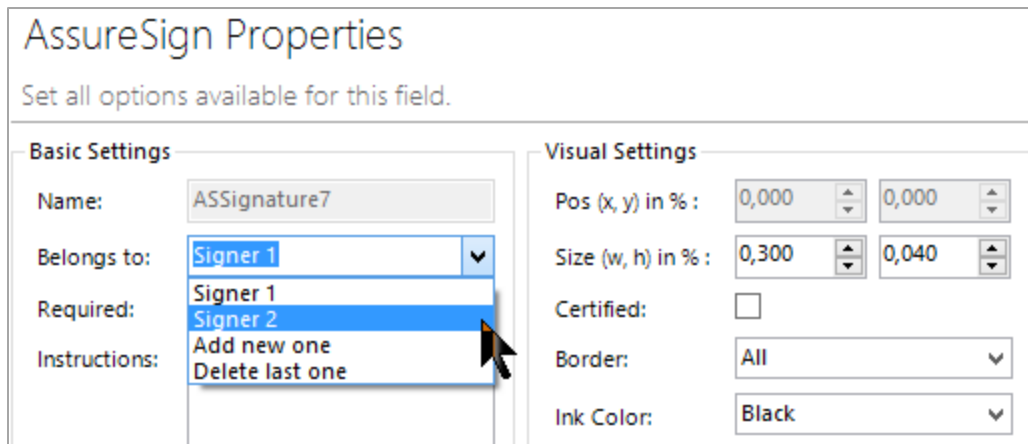


Figure 22: AssureSign signature process – properties



The checkbox next to the *Certified*-field must not be checked!

After saving this Document to CRM ("Save Template" in the www.mscrm-addons.com-tab) we can use it.

3.4 How do I merge a document and send it to AssureSign for 2 signers?

Do the same as described in CHAPTER 3.1 HOW DO I MERGE A DOCUMENT IN ORDER TO SEND IT TO ASSURESIGN FOR 1 SIGNER? (DOCUMENTSCOREPACK SIDE) ON PAGE 16. Next, sign in to AssureSign.

1 of 1

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede.

Company:
Name: A. Datum Corporation (sample)

Signer:
Email: lalaia@hubu.com
Forename: Frank
Surname: Itaas

Signature

Reviewed by:
Name:
Signature:

Figure 23: AssureSign signature process seen from the AssureSign side – Signer 1

At the bottom, you see the new fields. Because this is Signer 1 they are not visible yet. But after the customer has signed the document, the second Signer gets an email – and is able to sign the document:

Welcome Agree to Terms Sign Done

Please enter the appropriate text.

Back Continue

1 / 2

1 of 1

Signer:
Email: lalaia@hubu.com
Forename: Frank
Surname: Itaas

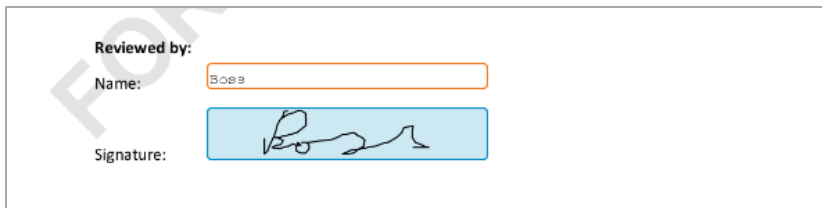
Signature

Reviewed by:
Name:
Signature:

Figure 24: AssureSign signature process – Signer 2

As you can see now the new fields in this step are active and the fields of Signer 1 are filled.

In the next step, you will have to sign it:




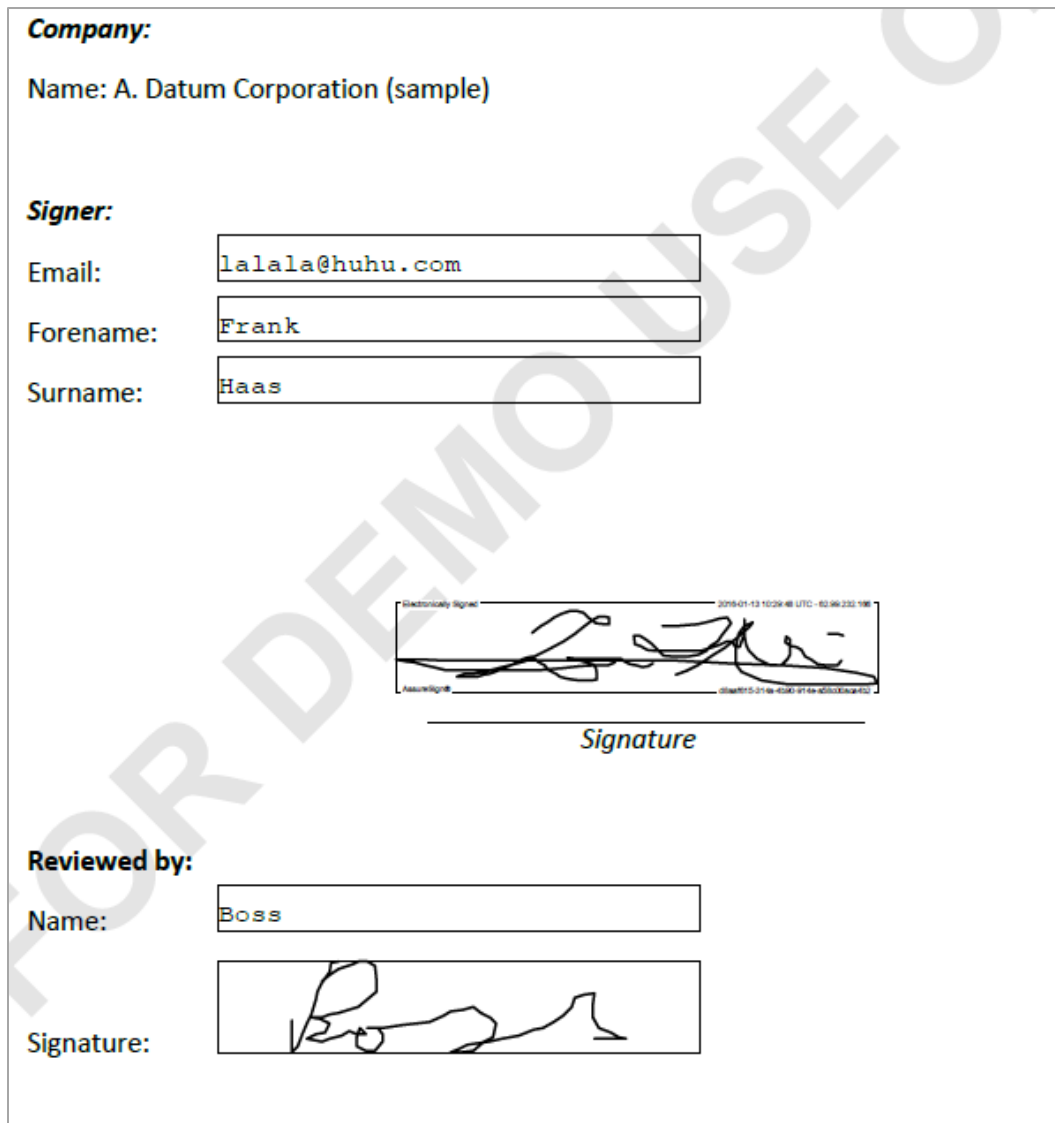
Reviewed by:
Name:
Signature: 

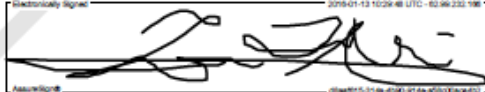
Figure 25: Signed document

And this is the result:



Company:
Name: A. Datum Corporation (sample)

Signer:
Email:
Forename:
Surname:

Electronically Signed 2019-01-13 10:29:48 UTC - 62.96.232.198

Handwritten Signature 01a6f1f5-01a6-4040-9f1e-a8303e3a4e02

Signature


Reviewed by:
Name:
Signature: 

Figure 26: Signed document - result

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