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Your company for MS-CRM ADD-ONS!

e-Signature Adobe Sign User Guide for Microsoft Dynamics 365

November 2021

e-Signature Adobe Sign User Guide
(How to work with e-Signatures for Microsoft Dynamics 365)

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CONTENT

Optional DocumentsCorePack Feature: Adobe Sign	4
1 How to work with Adobe Sign in DocumentsCorePack	5
1.1 Obtaining the Adobe Sign package	5
1.2 Installing the Adobe Sign package	5
1.3 Adobe Sign Users and Security Roles	5
1.4 AdobeSign Impersonation options	6
2 DocumentsCorePack templates for Adobe Sign	7
2.1 How to create a DocumentsCorePack template for AdobeSign	7
2.2 Adobe Sign text tags	7
2.3 Template Settings	8
3 Tutorials ("How To's")	9
3.1 How to merge a document with Adobe Sign by e-mail?	9
3.2 How to merge a document and start an in-person signing process?	16
3.3 How to create a document and sign it with AdobeSign in a Workflow	21
4 List of figures	26
5 Contact	28

Preamble

This documentation is intended to guide you through the usage of e-Signatures made with Adobe Sign in Microsoft Dynamics 365.



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 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 365 must be available:

- Microsoft Dynamics 365 OnPremise
- Microsoft Dynamics 365 Online

The purpose of e-Signatures?

DocumentsCorePack offers the possibility to use e-Signatures as an additional feature, supported by Adobe Sign 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 to a whole new level.

Optional DocumentsCorePack Feature: Adobe Sign

DocumentsCorePack has the possibility to use Adobe Sign as an additional feature. Adobe Sign offers a plug-and-play integration solution with Microsoft Dynamics 365. It is a tool that empowers you to electronically sign documents.

Benefit from this combination to take the usability of Microsoft Dynamics 365 to a whole new level.

If you decide to use Adobe Sign as an additional feature, please follow the steps in this documentation.

- [OBTAIN ADOBE SIGN PACKAGE](#)
- [INSTALL ADOBE SIGN](#)
- [SETUP ADOBE SIGN TO WORK CORRECTLY IN DYNAMICS 365](#)
- [SELECT THE USERS TO WHICH YOU WANT TO GRANT ACCESS](#)

For more Information about how to install and set up Adobe Sign for Dynamics 365 please follow the [Installation Guide](#) written by Adobe.

1 How to work with Adobe Sign in DocumentsCorePack

This chapter contains information about how to get started with Adobe Sign in DocumentsCorePack. If you decide to use Adobe Sign as an additional feature, please follow the steps in this chapter.

1.1 Obtaining the Adobe Sign package

Please find the current Adobe Sign for Microsoft Dynamics 365 **Online** package on [AppSource](#).

The Adobe Sign for Microsoft **On-Premises** package can be downloaded from the [Adobe Sign Integration page](#). On this page, you will also be able to review release notes, known issues and additional install/user guide information.

1.2 Installing the Adobe Sign package

The installation of Adobe Sign is very easy, please just follow the [Installation Guide](#) written by Adobe.

1.3 Adobe Sign Users and Security Roles

For using the Adobe Sign application, it is necessary that users have their security role configured to the Dynamics environment. The available security roles are:

ADOBE SIGN READER

Users have **read-only** access to Agreement records.

ADOBE SIGN USER

Users are able to see **only their own records** and have User level access to built-in Dynamics records such as Contacts, Accounts, Leads, Opportunities, Orders etc.

ADOBE SIGN ADMINISTRATOR

This role includes additional privileges in addition to the Adobe Sign User role such as adjusting Global Settings, Data Migration and **allowing visibility over all Agreements throughout the application**.



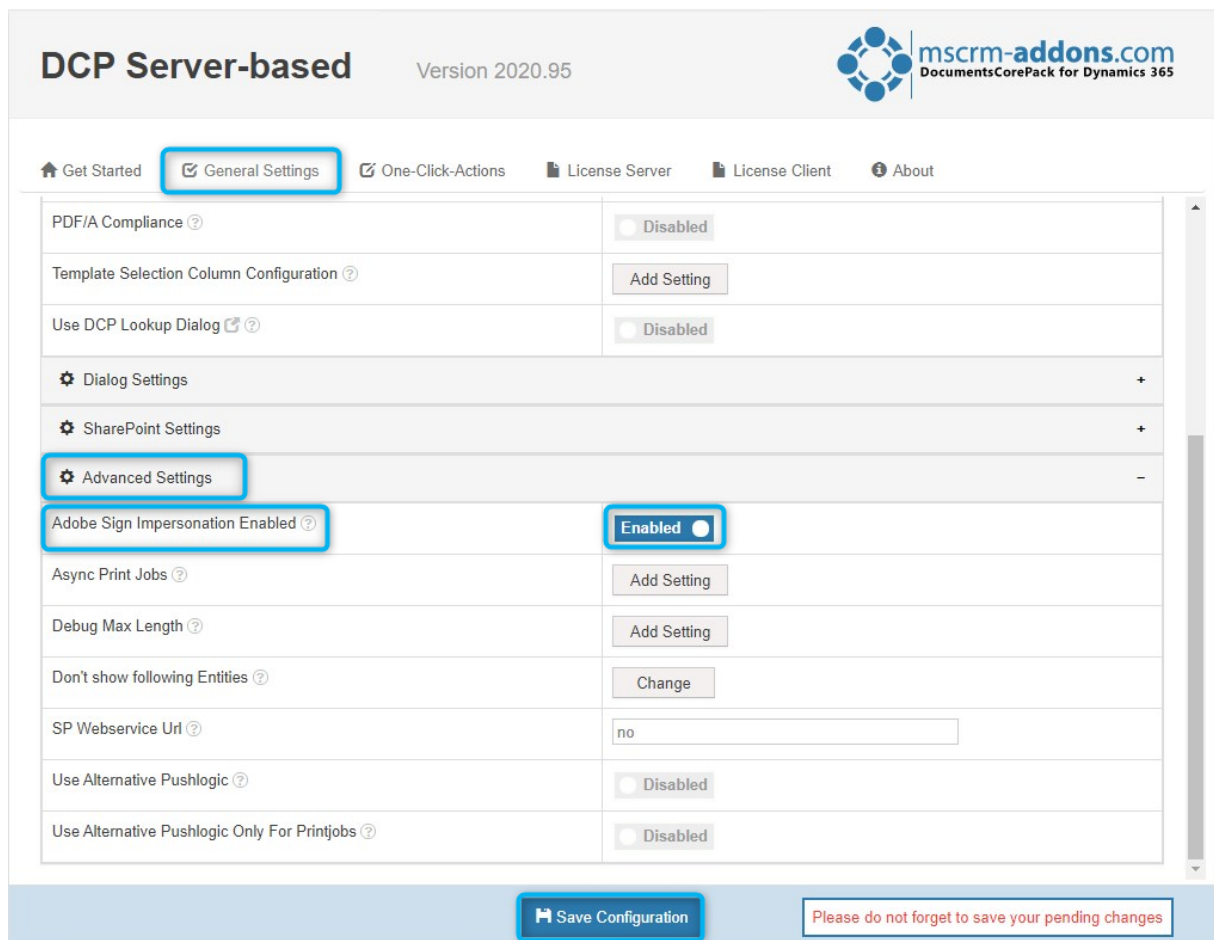
The DocumentsCorePack dialog only allows to select the option "Attach as AdobeSign e-mail" if Dynamics 365 user has "read-rights" for the AdobeSign settings entity (adobe_integrationsettings).

Find more information about how to configure the security roles in the [Adobe Installation Guide](#) in chapter *Post Install Configuration (Required)* and scroll down to *Deploy Adobe Sign to Users by Assigning Security Roles*.

1.4 AdobeSign Impersonation options

When you use DocumentsCorePack the default AdobeSign user is the service user. If you want to change it to the executing user, navigate to your *DocumentsCorePack General Settings*, open the Advanced Settings and enable the **[Adobe Sign Impersonation Enabled]**-button.

If the Impersonating setting is enabled, the AdobeSign emails are sent on behalf of the CRM users. If the option is deactivated (what is the standard setting), the AdobeSign email is sent on behalf of the CRM user of the DocumentsCorePack service.



The screenshot shows the 'DCP Server-based' interface, Version 2020.95, with the 'General Settings' tab selected. The 'Advanced Settings' section is expanded, and the 'Adobe Sign Impersonation Enabled' toggle is set to 'Enabled'. Other settings include 'PDF/A Compliance' (Disabled), 'Template Selection Column Configuration' (Add Setting), 'Use DCP Lookup Dialog' (Disabled), 'Dialog Settings' (+), 'SharePoint Settings' (+), 'Async Print Jobs' (Add Setting), 'Debug Max Length' (Add Setting), 'Don't show following Entities' (Change), 'SP Webservice Url' (no), 'Use Alternative Pushlogic' (Disabled), and 'Use Alternative Pushlogic Only For Printjobs' (Disabled). A 'Save Configuration' button and a warning message 'Please do not forget to save your pending changes' are at the bottom.

Setting	Value
PDF/A Compliance ?	Disabled
Template Selection Column Configuration ?	Add Setting
Use DCP Lookup Dialog ?	Disabled
Dialog Settings	+
SharePoint Settings	+
Advanced Settings	-
Adobe Sign Impersonation Enabled ?	Enabled
Async Print Jobs ?	Add Setting
Debug Max Length ?	Add Setting
Don't show following Entities ?	Change
SP Webservice Url ?	no
Use Alternative Pushlogic ?	Disabled
Use Alternative Pushlogic Only For Printjobs ?	Disabled

Figure 1: Adobe Sign Impersonation Enabled

2 DocumentsCorePack templates for Adobe Sign

After you have configured the security roles for Adobe Sign users in Microsoft Dynamics 365, and you have made sure that they have all the rights they need, you can create a DocumentsCorePack template for AdobeSign. This chapter outlines how to create such templates.

2.1 How to create a DocumentsCorePack template for AdobeSign

To be able to insert fields into Microsoft Word documents, you must use the DocumentsCorePack TemplateDesigner. To do so, please open the *Insert MailMerge Fields* in the *www.mscrm-addons.com*-tab of the Word document to create your DocumentsCorePack template for AdobeSign.

Please find all the information about how to use the Template Designer in the [Template Designer User Guide](#) on our website.

2.2 Adobe Sign text tags

To use Adobe Sign in DocumentsCorePack you have to enter Adobe Sign text tags. These are formatted text that can be placed anywhere within the content of your template. Text tags are converted into Adobe Sign form fields when the document is sent for signature or uploaded.

Please find all possible Adobe Sign text tags in the [Adobe Sign Text Tag Guide](#).

The figure below shows a template with Adobe text tags for initials and signatures for two signees.

mscrm-addons.com

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Work Order: <<msdyn_name>> Type: <<msdyn_workordertype_msdyn_name>>

Customer: <<msdyn_serviceaccount_name>>
<<msdyn_serviceaccount_address1_line1>>
<<msdyn_serviceaccount_address1_city>>,
<<msdyn_serviceaccount_address1_postalcode>>
<<msdyn_serviceaccount_address1_country>>

Service Description: <<msdyn_primaryincidentdescription>>

Products:

Product	Qty	Amount
<<msdyn_name>>	<<msdyn_quantity>>	<<msdyn_totalamount>>
Subtotal:		<<msdyn_subtotalamount>>
Tax:		<<msdyn_totalsalestax>>
Total Amount:		<<msdyn_totalamount>>

1 {{Int_es.:signer1:initials}}

Tasks:

Task	Est. Duration (min)	Actual Duration (min)
<<msdyn_name>>	<<msdyn_estimatedduration>>	<<msdyn_actualduration>>

2 {{Int_es.:signer1:initials}}

Signatures:

Approved by: {{Sig_es.:signer1:signature}}

Approved by: {{Sig_es.:signer2:signature}}

Figure 2: DCP template with two signees

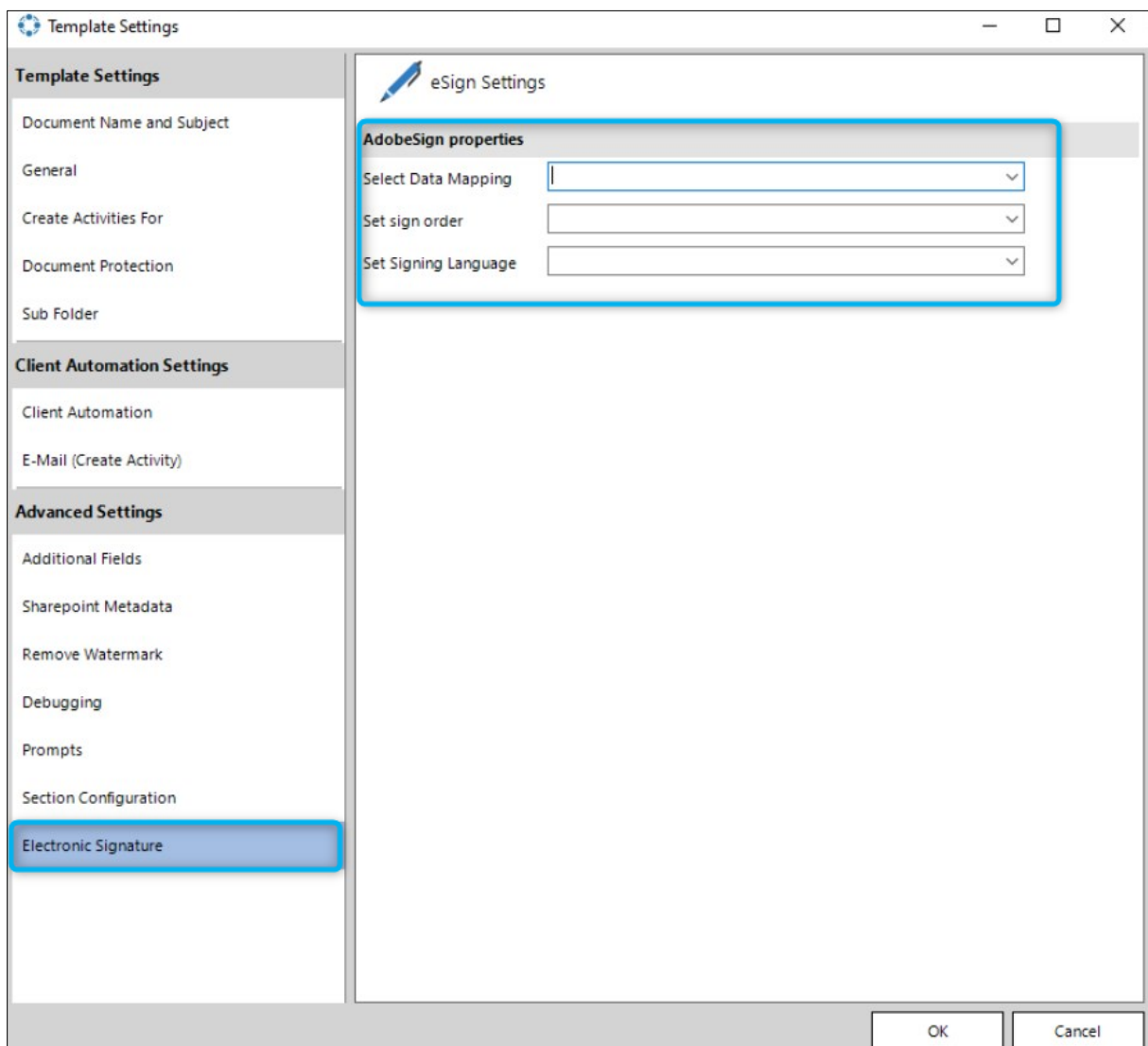
2.3 Template Settings

Open the „eSign Settings“ and set following properties for „AdobeSign“:

- DataMapping (The Agreement Mapping Template entity has to be already created in CRM),
- Sign order – choose if signee should sign document in any order or in order of adding to agreement,
- Signing language – default language of Agreement

Learn more about creating a [AdobeSign Data Mapping template](#).

In eSign Settings select the created DataMapping template:



The screenshot shows the 'Template Settings' dialog box. On the left, the 'Template Settings' sidebar is visible, with 'Electronic Signature' selected under the 'Advanced Settings' section. The main area is titled 'eSign Settings' and contains a section for 'AdobeSign properties'. This section has three dropdown menus: 'Select Data Mapping', 'Set sign order', and 'Set Signing Language'. The 'Select Data Mapping' dropdown is highlighted with a blue box. At the bottom right, there are 'OK' and 'Cancel' buttons.

Figure 3: eSign settings


3 Tutorials ("How To's")

This chapter provides you with helpful tutorials that show you how to work with Adobe Sign efficiently.

3.1 How to merge a document with Adobe Sign by e-mail?

This tutorial outlines how to merge a document with Adobe Sign by e-mail. In this example, we use a template which contains two signees. The document will be sent via e-mail to the two signees to be signed. The result can look like in the figure below.

mscrm-addons.com

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Work Order: 00001

Type: Delivery

Customer:

Fourth Coffee
Carrera 1b No 10-01
Bogota,
Columbia

Service Description:


Printer setup and configuration

Products:


Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$177.00
Subtotal:		\$1,177.00
Tax:		\$47.08
Total Amount:		\$1,224.08

Adobe Sign Test Document


Not for commercial use




Task	Est. Duration (min)	Actual Duration (min)
Setup	60	45
Configuration	150	150



Signatures:


Colosqueo Bianca

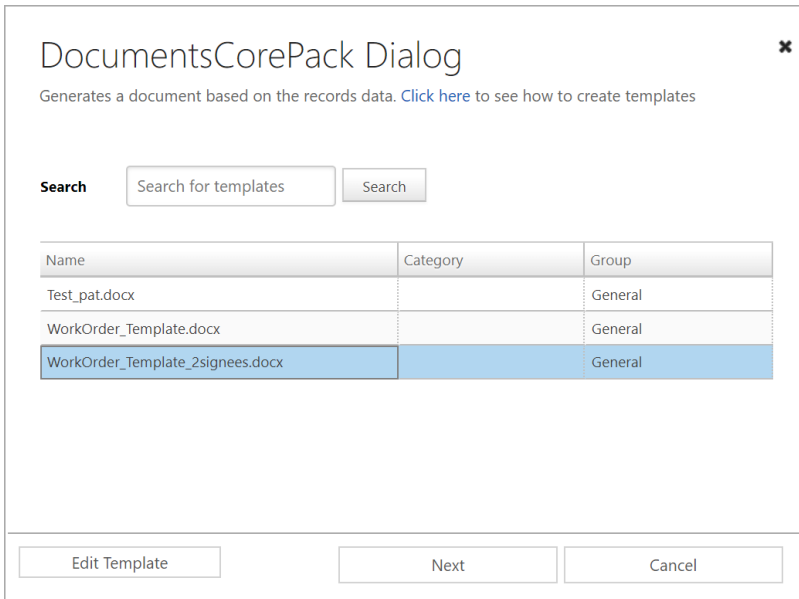
Approved by:


Michael Dole

1 | Page

Figure 4: Example: DCP document with two Adobe Sign signatures

First, open your Dynamics 365 and search the entity you want to create a document for – in this example Work Order. Next, please hit the **[CREATE DOCUMENT]**-button which opens the DocumentsCorePack Dialog as you can see below.



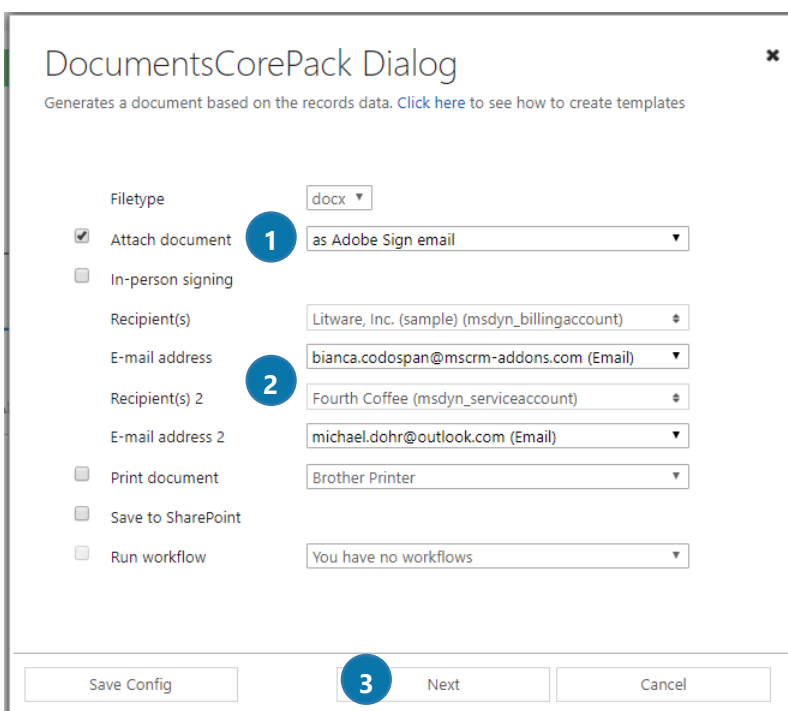
The dialog box is titled "DocumentsCorePack Dialog" and includes a subtitle "Generates a document based on the records data. [Click here](#) to see how to create templates". It features a search section with a text input "Search for templates" and a "Search" button. Below this is a table with three columns: "Name", "Category", and "Group". The table contains three rows: "Test_pat.docx", "WorkOrder_Template.docx", and "WorkOrder_Template_2signees.docx". The last row is highlighted in blue. At the bottom, there are three buttons: "Edit Template", "Next", and "Cancel".

Name	Category	Group
Test_pat.docx		General
WorkOrder_Template.docx		General
WorkOrder_Template_2signees.docx		General

Figure 5: DCP Dialog – select your template

Here, please select the template you want to execute – in this case we want a document with two signees to be signed, so please select the *WorkOrder_Template_2signees.docx*.

Next, define what your document should do. In this example, we want the document to be attached, so please check the *Attach document* checkbox and select *as Adobe Sign email* from the drop-down menu. Select your recipients and their e-mail addresses from the drop-down menus – in this case, two, because we have two signees. **Please note:** The first recipient will get the document first and after signing it, the document will be sent to the second recipient. Click on the **[Next]**-button to continue.



The dialog box is titled "DocumentsCorePack Dialog" and includes a subtitle "Generates a document based on the records data. [Click here](#) to see how to create templates". It features a "Filetype" dropdown set to "docx". Below this are several options: "Attach document" (checked, with a blue circle 1 next to it), "In-person signing" (unchecked), "Recipient(s)" (set to "Litware, Inc. (sample) (msdyn_billingaccount)"), "E-mail address" (set to "bianca.codospan@mscrm-addons.com (Email)", with a blue circle 2 next to it), "Recipient(s) 2" (set to "Fourth Coffee (msdyn_serviceaccount)"), "E-mail address 2" (set to "michael.dohr@outlook.com (Email)"), "Print document" (unchecked, set to "Brother Printer"), "Save to SharePoint" (unchecked), and "Run workflow" (unchecked, set to "You have no workflows"). At the bottom, there are three buttons: "Save Config", "Next" (with a blue circle 3 next to it), and "Cancel".

Figure 6: DCP Dialog – define how your document should be executed

You can check your document before you forward it to Adobe Sign. Therefore, please click on the attachment, highlighted in yellow.

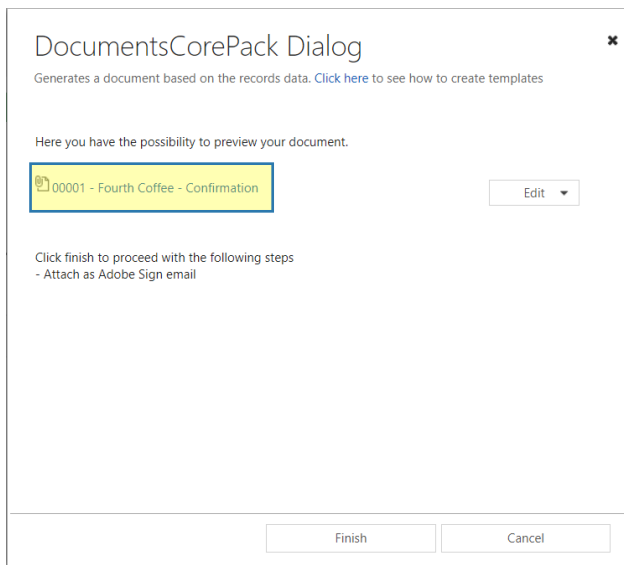


Figure 7: DCP Dialog – Preview document

This opens a preview of your document. As you can see, there are two different Adobe Sign text tags: one for the initials and one at the bottom of your document for the signatures of the two signees (highlighted in yellow).

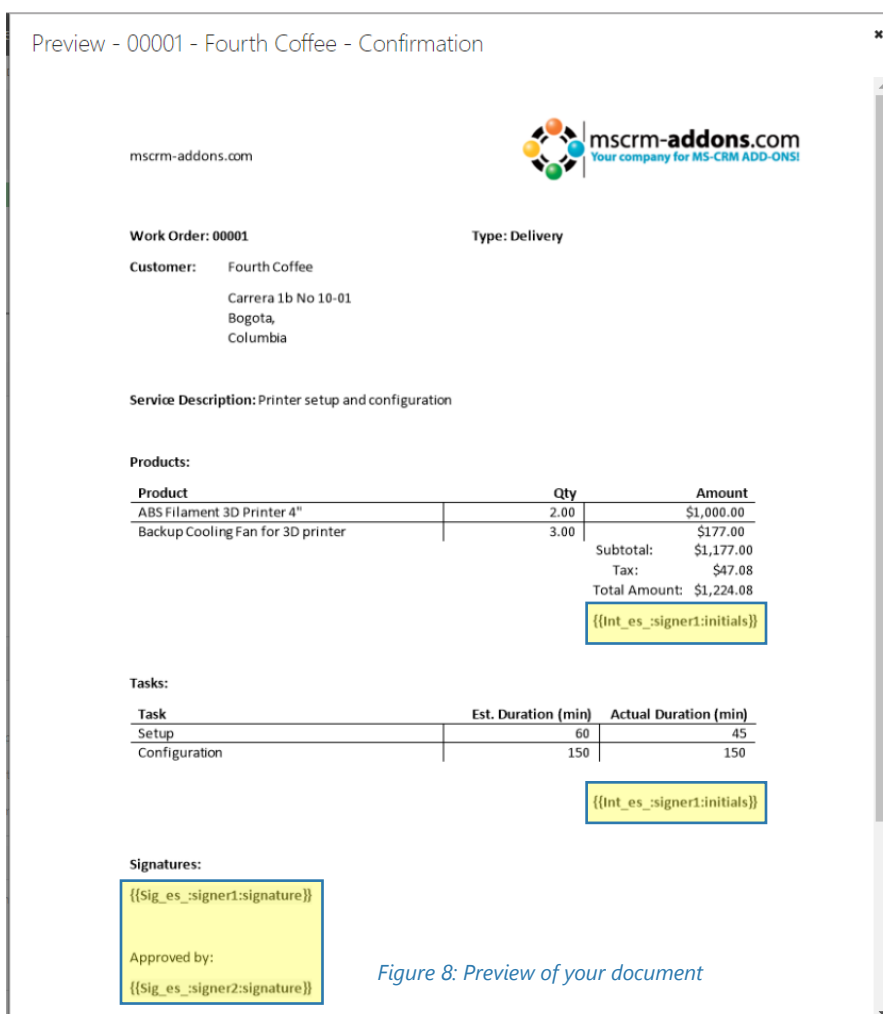


Figure 8: Preview of your document

If your document is fine, please click **[Finish]** to attach the document as Adobe Sign mail.

Now the first recipient you have selected receives an e-mail with the Adobe Sign document as you can see below.



Adobe Sign

Michael Dohr Has Sent You [DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation to Sign

[Click here to review and sign \[DEMO USE ONLY\] 00001 - Fourth Coffee - Confirmation.](#)


After you sign [DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation, the agreement will be sent to michael.dohr@outlook.com. Then, all parties will receive a final PDF copy by email.

If you need to delegate this document to an authorized party for signature, please do not forward this email. Instead, [click here](#) to delegate.

Figure 9: E-mail with link to Adobe Sign document

With a click on the blue text "Click here to review and sign", the document opens in a browser where the first recipient must enter his initials and sign the document. As you can see in the figure below, the fields, that must be completed by the first recipient, are highlighted in yellow and marked with Start.

mscrm-addons.com


mscrm-addons.com
 Your company for MS-CRM ADD-ONS!

Work Order: 00001
Customer: Fourth Coffee
 Carrera 1b No 10-01
 Bogota,
 Columbia

Type: Delivery

Service Description: Printer setup and configuration

Products:

Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$177.00
		Subtotal: \$1,177.00
		Tax: \$47.08
		Total Amount: \$1,224.08

Adobe Sign Test Document

Not for commercial use

*Initials

Task	Est. Duration (min)	Actual Duration (min)
Setup	60	45
Configuration	150	150

Signatures:

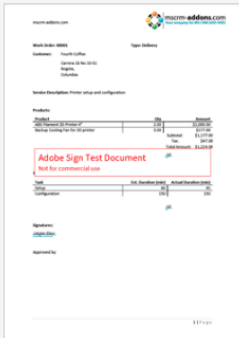
*Click here to sign

*Initials

Approved by:

Figure 10: Sign the document

A click on the **[Click to Sign]**-button at the bottom will finish the process and will send the document to the second recipient (selected before) to be signed. Also, a copy can be downloaded here.



You have successfully signed the agreement
"[DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation".

It has now been sent to michael.dohr@outlook.com to sign.

Download a copy


Sign up for a free trial

Figure 11: Document successfully signed - message

After the second recipient signs the document, all parties of the agreement will automatically receive a copy of the signed document (see figure below).



Adobe Sign



Work Order: 00001
Customer: Fourth Coffee
Camera ID No: 00-001
Region: Columbia

Service Description: Printer setup and configuration

Product	Qty	Amount
MSI Flatbed 30 Printer 4"	1.00	\$1,000.00
Backup Coding Pen for 30 printer	1.00	\$1.00
Subtotal		\$1,001.00
Tax		\$47.00
Total Amount		\$1,048.00

Task	Est. Duration (days)	Actual Duration (days)
Setup	40	40
Configuration	200	200

Signatures:
[Signed: John](#)

Approved by:
[John Doe](#)

3 of 3 pages

[DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation between mscrm-addons.com Corp., Codospan Bianca and Michael Dohr is Signed and Filed!

From: Michael Dohr (mscrm-addons.com Corp.)
To: Codospan Bianca, Michael Dohr and Michael Dohr

Attached is a final copy of [DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation.

Copies have been automatically sent to all parties to the agreement.

You can view [the document](#) in your Adobe Sign account.

Why use Adobe Sign:

- Exchange, Sign, and File Any Document. In Seconds!
- Set-up Reminders. Instantly Share Copies with Others.
- See All of Your Documents, Anytime, Anywhere.

Figure 12: E-mail signed document with two signees

Hit the blue text "the document" to open the signed document.

In the so opened window in your browser, you can see ① all details, ② the steps of the process and the document, which now contains ③ both signatures. Click on ④ PDF to download your signed document.

Adobe Sign

Sign In

[DEMO USE ONLY] 00001 - Fourth Coffee - ...

Manage Agreement Audit Report Print PDF

From: Michael Dohr (mscrm-addons.com Corp.)
 To: Codospan Bianca (bianca.codospan@mscrm-addons.com), Michael Dohr (michael.dohr@outlook.com)
 Date: 01/28/2019, 10:48 AM
 Status: Signed
 Message: none

Sent out for signature to Codospan Bianca (bianca.codospan@mscrm-addons.com) Jan 28, 10:14 AM

Viewed by Codospan Bianca (bianca.codospan@mscrm-addons.com) Jan 28, 10:15 AM

Document e-signed by Codospan

Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$177.00
		Subtotal: \$1,177.00
		Tax: \$47.08
		Total Amount: \$1,224.08

Adobe Sign Test Document
 Not for commercial use

Task	Est. Duration (min)	Actual Duration (min)
Setup	60	45
Configuration	150	150

Signatures:

Codospan Bianca
 Codospan Bianca (Jan 28, 2019)

Approved by:

Michael Dohr
 Michael Dohr (Jan 28, 2019)

Figure 13: The signed document ready for download


Congratulations! You have your first document signed with Adobe Sign.

3.2 How to merge a document and start an in-person signing process?

This tutorial outlines how to merge a document with Adobe Sign and start an in-person signing process. With the in-person signing, a host facilitates an Adobe Sign session. The host must be an Adobe Sign account holder and the signers are only required to be with the host in order to sign documents.

In this example, we create a document and use therefore a template which contains one signer. The result can look like in the figure below.

mscrm-addons.com

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Work Order: 00001

Type: Delivery

Customer:

Fourth Coffee
Carrera 1b No 10-01
Bogota,
Columbia

Service Description:


Printer setup and configuration

Products:


Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$177.00
		Subtotal: \$1,177.00
		Tax: \$47.08
		Total Amount: \$1,224.08

Adobe Sign Test Document



Not for commercial use



Task	Est. Duration (min)	Actual Duration (min)
Setup	60	45
Configuration	150	150



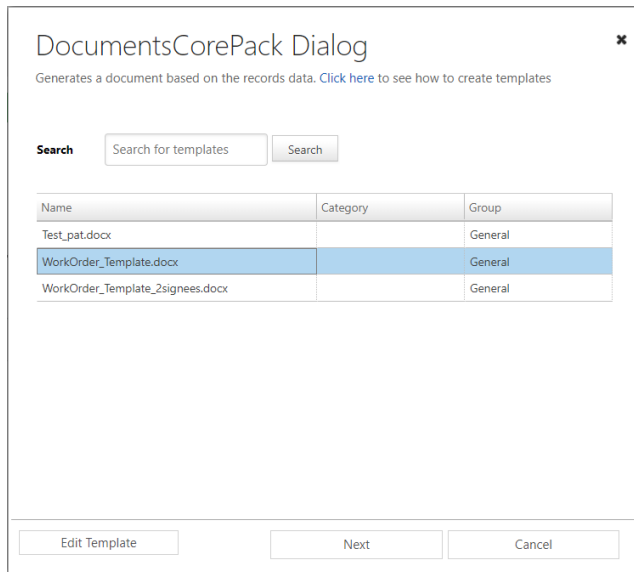
Signatures:



1 | Page

Figure 14: Example: Adobe Sign in-person signing in DocumentsCorePack

Like explained in the last chapter, please open your Dynamics 365 and search the entity you want to create a document for. Next, please hit the **[CREATE DOCUMENT]**-button which opens the DocumentsCorePack Dialog as you can see below.



The screenshot shows the 'DocumentsCorePack Dialog' window. It has a title bar with a close button. Below the title, it says 'Generates a document based on the records data. [Click here](#) to see how to create templates'. There is a 'Search' section with a text input 'Search for templates' and a 'Search' button. Below this is a table with three columns: 'Name', 'Category', and 'Group'. The table contains three rows: 'Test_pat.docx', 'WorkOrder_Template.docx' (which is highlighted in blue), and 'WorkOrder_Template_2signees.docx'. All rows have 'General' in the 'Group' column. At the bottom of the dialog are three buttons: 'Edit Template', 'Next', and 'Cancel'.

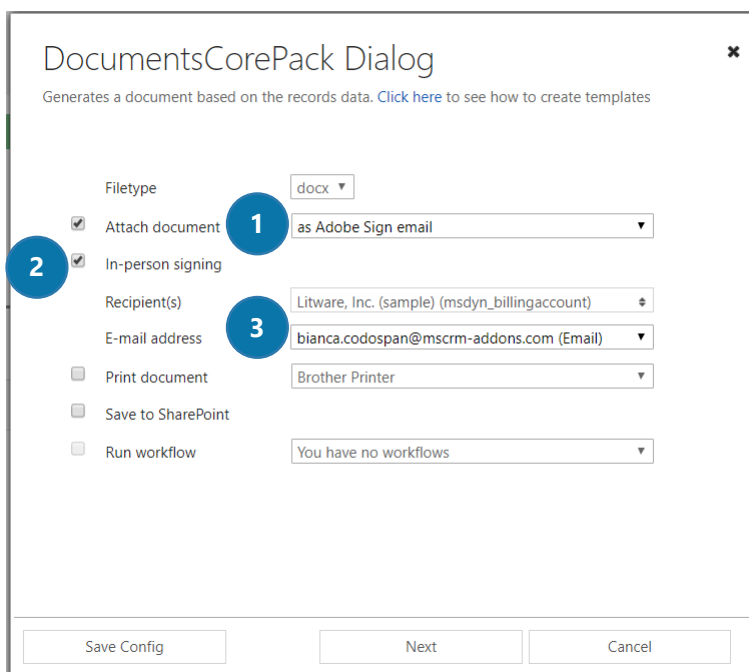
Name	Category	Group
Test_pat.docx		General
WorkOrder_Template.docx		General
WorkOrder_Template_2signees.docx		General

Figure 15: DCP Dialog – select template

Here, please select the template you want to execute – in this case *WorkOrder_Template.docx*.

Next, define what your document should do. In this example, we want the document to be attached, so please check the *Attach document* checkbox and select *as Adobe Sign email* from the drop-down menu. Check the *In-person signing* checkbox and your recipient and the e-mail address from the drop-down menu.

Please note: The recipient should be the person (the host – explained at the beginning) who is required to be with the signer in order to sign the document. Click on **[Next]** to continue.



The screenshot shows the 'DocumentsCorePack Dialog' window with configuration options. It has a title bar with a close button. Below the title, it says 'Generates a document based on the records data. [Click here](#) to see how to create templates'. There are several sections: 'Filetype' with a dropdown set to 'docx'; 'Attach document' with a checked checkbox and a dropdown set to 'as Adobe Sign email' (labeled with a blue circle 1); 'In-person signing' with a checked checkbox (labeled with a blue circle 2); 'Recipient(s)' with a dropdown set to 'Litware, Inc. (sample) (msdyn_billingaccount)'; 'E-mail address' with a dropdown set to 'bianca.codospa@mscrm-addons.com (Email)' (labeled with a blue circle 3); 'Print document' with an unchecked checkbox; 'Save to SharePoint' with an unchecked checkbox; and 'Run workflow' with a dropdown set to 'You have no workflows'. At the bottom are three buttons: 'Save Config', 'Next', and 'Cancel'.

Figure 16: DCP Dialog – define how your document should be executed

The next window allows you to preview and edit your document, as explained in the chapter before. Hit **[Finish]** to continue.

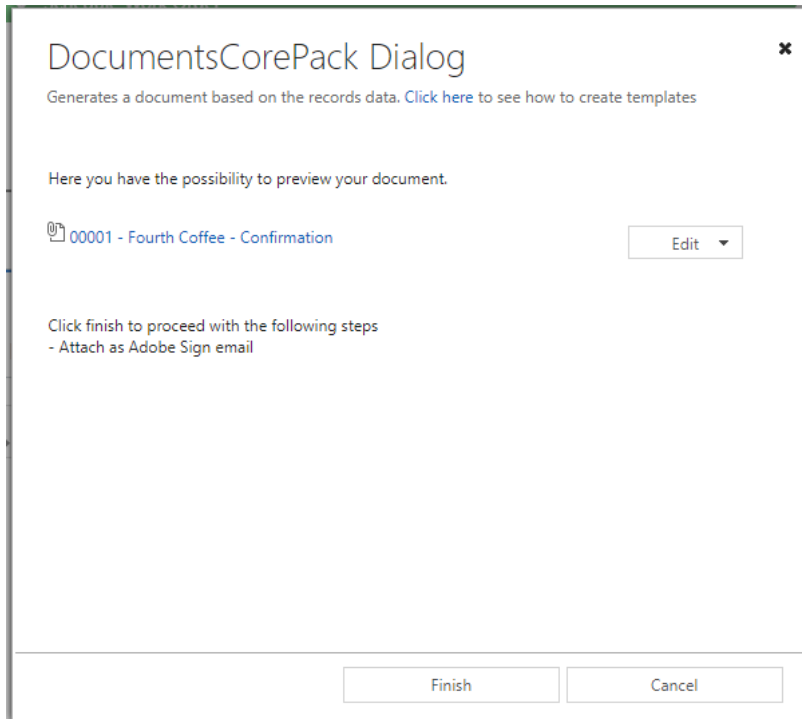


Figure 17: DCP Dialog – Preview or edit document

Now you are able to open the document directly from the DCP Dialog, as you can see in the figure below.

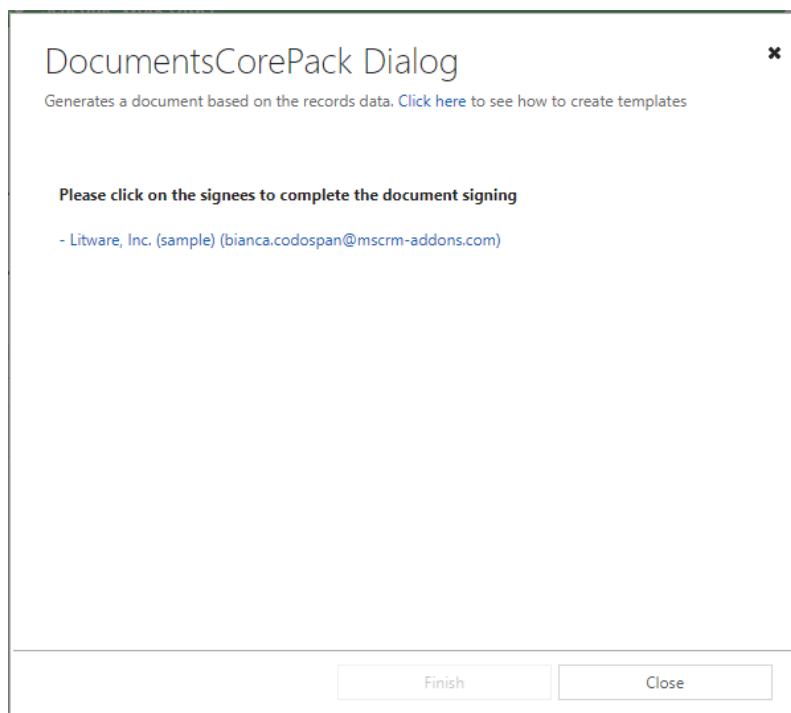


Figure 18: DCP Dialog – complete the document signing

But also, an e-mail has been sent to the host who is required to be with the signer in order to sign the document (see figure below). With a click on the blue text "Click here to review and sign", the document opens in a browser to be signed.



Adobe Sign

mscrm-addons.com

mscrm-addons.com
Your company for MS CRM Add-ons

Work Order: 00001 Type: Delivery

Customer: Fourth Coffee
Camera 3b No 10-01
Regina,
Columbia

Service Description: Printer setup and configuration

Products:

Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$1,177.00
		Subtotal: \$2,177.00
		Tax: \$47.00
		Total Amount: \$2,224.00

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Task	Est. Duration (min)	Actual Duration (min)
Setup	40	45
Configuration	120	120

Signatures:

3 of 3

Michael Dohr Has Sent You [DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation to Sign


[Click here to review and sign \[DEMO USE ONLY\] 00001 - Fourth Coffee - Confirmation.](#)

After you sign **[DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation**, all parties will receive a final PDF copy by email.

If you need to delegate this document to an authorized party for signature, **please do not forward this email**. Instead, [click here](#) to delegate.

Figure 19: E-mail with a link to Adobe Sign document

As you can see in the figure below, the document is now ready to be signed. After the signer signs the document, the host has to hit the **[Click to Sign]**-button at the bottom of the page (see picture on the next page).

mscrm-addons.com

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Work Order: 00001
Type: Delivery

Customer: Fourth Coffee
Carrera 1b No 10-01
Bogota,
Columbia

Service Description: Printer setup and configuration


Products:

Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$177.00
		Subtotal: \$1,177.00
		Tax: \$47.08
		Total Amount: \$1,224.08

Adobe Sign Test Document
Not for commercial use

Task	Est. Duration (min)	Actual Duration (min)
Setup	60	45
Configuration	150	150

Signatures:

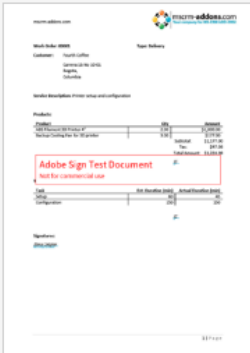


1 | Page

I agree to the Terms of Use and Consumer Disclosure of this document
Click to Sign

Figure 20: Sign the document

Like before, a copy will be sent to all parties. Congratulations, you have signed your first Adobe Sign document using in-person signing.



You have successfully signed the agreement "[DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation".

Copies will be e-mailed to all parties.

Download a copy

Sign up for a free trial

Figure 21: Document successfully signed - message

3.3 How to create a document and sign it with AdobeSign in a Workflow

Open your Microsoft Dynamics 365, navigate to Settings and select Processes.

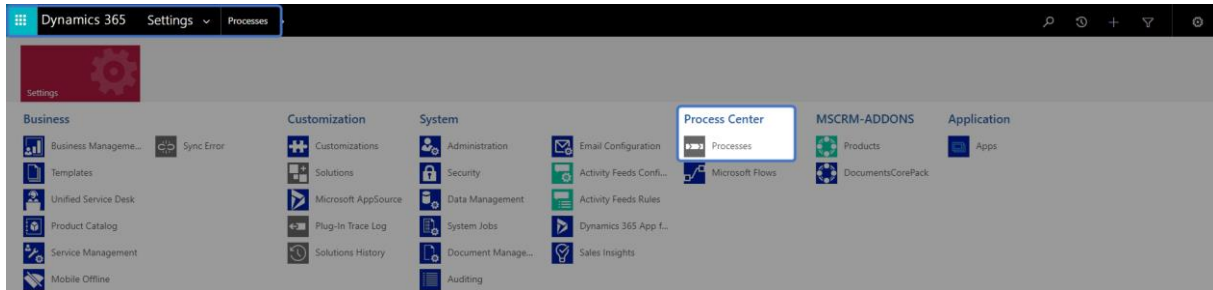


Figure 22: Dynamics 365 > Settings > Processes

You are now on the surface below. Here you can generate a new process by clicking the **[New]**-button (highlighted).

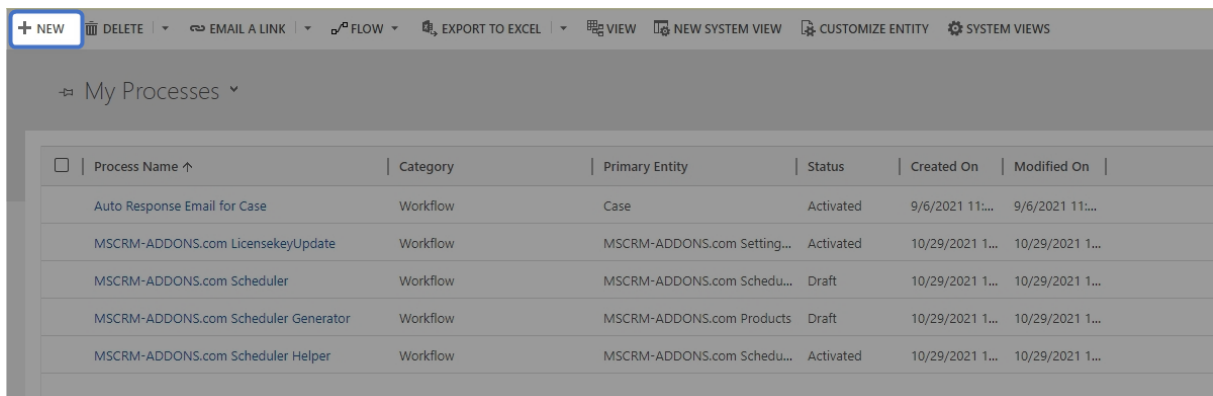


Figure 23: Add new process

You can create your process like you usually do in Dynamics 365. However, it is necessary to select Workflow as Category and proceed by clicking the **[OK]**-button.

Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *

Category: * Entity: *

☒ Run this workflow in the background (recommended)

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Type: ☒ New blank process ☐ New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owner
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Figure 24: Create process

After customizing the properties of your *Workflow*, click on the **[Add Step]**-button and choose "Create Record", like you can see below.

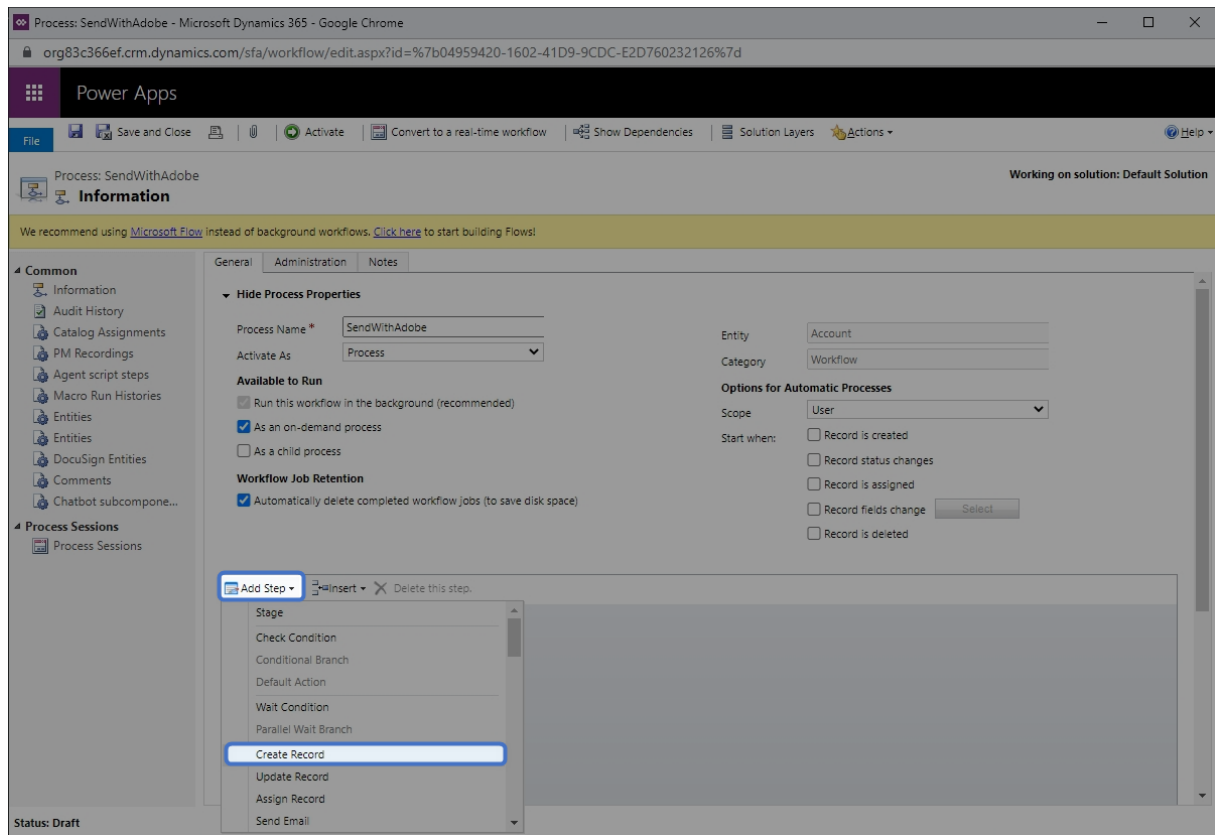


Figure 25: Add step

1 Next, open the drop-down menu of the Create field and select *MSCRM- ADDONS.com AutoMergeWorkingItems*. You can also type a description of your step into the highlighted field.

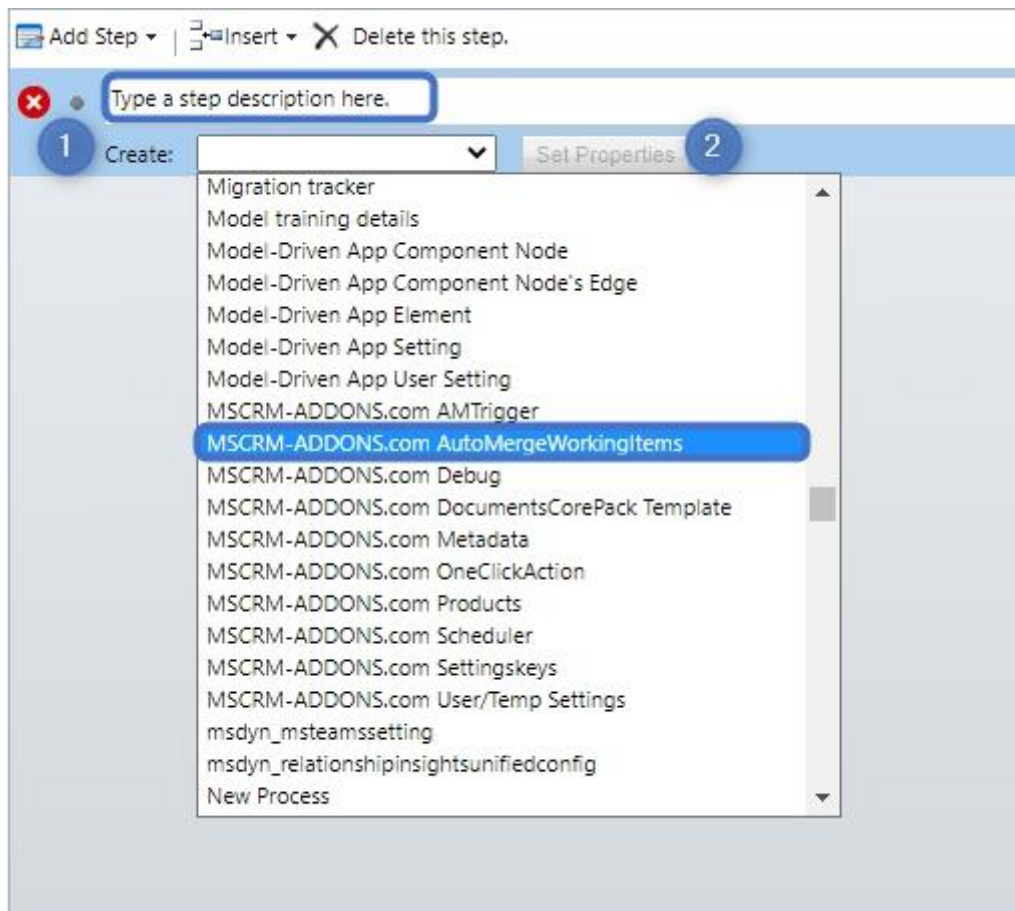


Figure 26: *MSCRM- ADDONS.com AutoMergeWorkingItems*

A click on the **2** **[Set Properties]**-button will provide you with the window below.

Figure 27: Set properties

- 1 Type in the name of your step and select an AutoMergeAction, in this case *Create Document*.
- 2 Next, you will have to define the "*PrimaryRecordUrl*". You will first have to click into the field, which will be unfilled at first. Navigate to the "*Form Assistant*" on the right side and open the drop-down menu (below Look for) and select "*Account*". Then open the drop-down menu below and select "*Record URL (Dynamic)*". Click on the **[Add]**-button and it will be added to the field below. You can also define a default value. Finally click the **[OK]**-button and your "*PrimaryRecordUrl*" will be automatically filled with the right URL, marked in yellow.
- 3 Scroll down to the Sign document area and do the same as in step 2 to add the DocumentGUID. Select *AdobeSign* as *Sign Provider*.
- 4 Then type in the Name and e-mail of the recipient.
Please note: You can add more than one recipient by using the vertical bar (|) between the Names and the Emails, for example Max Power|John Smith. It is important when your template provides more than one person to sign.
- 5 This step starts the main signing workflow. "*Save and Close*" this window.

Finally, you must activate your workflow to use it, because this is just a draft, so, please click the **[Activate]**-button.

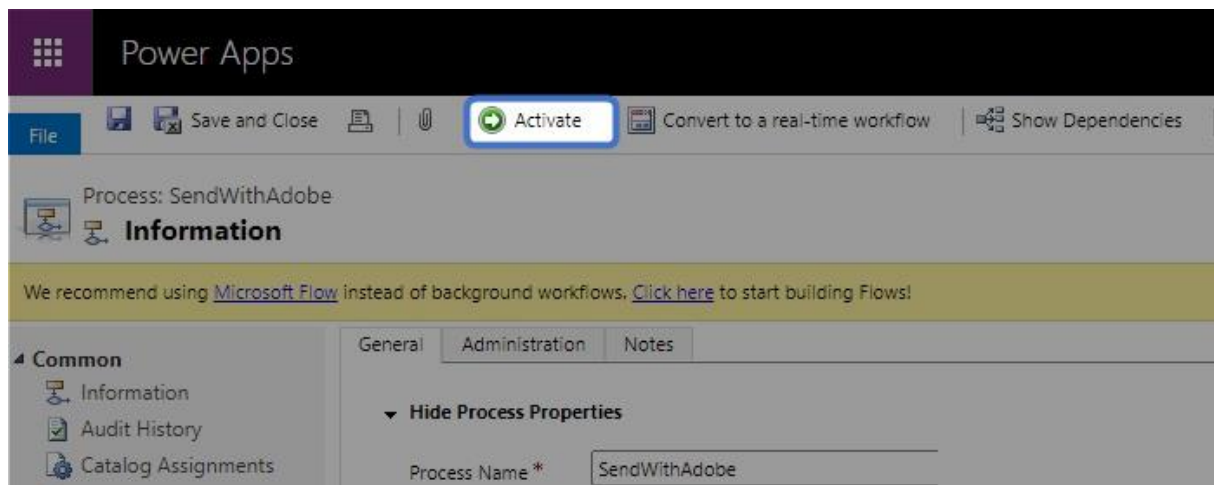


Figure 28: Activate Workflow

4 List of figures

Figure 1: Adobe Sign Impersonation Enabled.....	6
Figure 2: DCP template with two signees.....	7
Figure 3: eSign settings	8
Figure 4: Example: DCP document with two Adobe Sign signatures.....	9
Figure 5: DCP Dialog – select your template	10
Figure 6: DCP Dialog – define how your document should be executed	10
Figure 7: DCP Dialog – Preview document	11
Figure 8: Preview of your document	11
Figure 9: E-mail with link to Adobe Sign document	12
Figure 10: Sign the document.....	13
Figure 11: Document successfully signed - message	13
Figure 12: E-mail signed document with two signees	14
Figure 13: The signed document ready for download.....	15
Figure 14: Example: Adobe Sign in-person signing in DocumentsCorePack.....	16
Figure 15: DCP Dialog – select template	17
Figure 16: DCP Dialog – define how your document should be executed	17
Figure 17: DCP Dialog – Preview or edit document.....	18
Figure 18: DCP Dialog – complete the document signing.....	18
Figure 19: E-mail with a link to Adobe Sign document.....	19
Figure 20: Sign the document.....	20
Figure 21: Document successfully signed - message	20
Figure 22: Dynamics 365 > Settings > Processes	21
Figure 23: Add new process.....	21
Figure 24: Create process	22
Figure 25: Add step	23
Figure 26: MSCRM- ADDONS.com AutoMergeWorkingItems	24

Figure 27: Set properties	25
Figure 28: Activate Workflow	26

5 Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact support@mscrm-addons.com.

For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.



Headquarter – Europe

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
A-8020 Graz
Austria

Tel Austria +43 316 680-880-0
Fax +43 316 680-880-25

Support:

7AM - 7PM GMT+1 (Monday-Friday)

Sales:

+43 316 680 880 14
sales@mscrm-addons.com

www.ptm-edv.at

www.mscrm-addons.com



Headquarter – US

mscrm-addons.com Corp
1860 North Rock Springs Rd
Atlanta, GA 30324
United States

Tel US +1 404.720.6066

Support:

9AM - 6PM EST (Monday-Friday)

Sales:

+1 404 720 6046
bailey.moss@mscrm-addons.com

www.mscrm-addons.com