e-Signature - DocuSign User Guide for Microsoft CRM 2015/2016 and Dynamics 365

e-Signature DocuSign User Guide
(How to work with e-Signatures for Microsoft 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 DocuSign 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 (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

The purpose of e-Signatures?

DocumentsCorePack offers the possibility to use e-Signatures as an additional feature, supported by DocuSign 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: DocuSign

DocumentsCorePack has also the possibility to use DocuSign as an additional feature. DocuSign is a tool that gives you the chance to manage e-Signatures in Microsoft Dynamics 365.

DocuSign for Microsoft Dynamics 365 supports CRM ONLINE only!
(OnPremise may work - but it is not supported by DocuSign!)

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

- Create a DocuSign Business Flex/Advanced Solutions account
- Install DocuSign_DynamicsCRM (at least version 5.2 or higher)
- Setup DocuSign to work correctly in Dynamics 365 (CRM)
- Install the additional DocumentsCorePackServerDocuSign.zip solution (download here see step 4)
  Please check if you have version 1.7 or above. If not, we recommend updating your version. Without the latest version, our new features (Text, Notes or Radio Buttons) are not available. With the latest version, it is also not necessary to create Custom Actions (please have a look at chapter 1.1.5 How to create Custom Actions on page 13)
- Activate the DCPDocuSignWorkflow
  These two steps are only required if you would like to get pushbacks from DocuSign. The solution and the workflow both require DCP Server version 8.173 or higher and at least DocuSign_DynamicsCRM version 5.2 or higher.
  It is also possible to install our DocuSign solution with the Dynamics CRM Version 5.0. In this case, the DocuSign Admin will receive all status emails regarding DocuSign, for example with the subject "Fwd: Completed: Please Review and sign your document". The creator of the document will not be informed by email. This version also does not support the Document-Push back function. This means, that the signed documents will not be added to your CRM automatically.

For more Information about how to install and setup DocuSign for Dynamics 365 please follow the Installation Guide written by DocuSign.

1.1 How to work with DocuSign in DocumentsCorePack

The installation of DocuSign is very easy.

First, every Microsoft Dynamics 365 (CRM) user who wants to use DocuSign as an additional feature in DocumentsCorePack, must also be set as an active user in DocuSign. For further information on this topic, please have a look at CHAPTER 1.1.1 HOW TO ADD A USER TO A DOCUSIGN ACCOUNT ON PAGE 6.

Next, the *Send on behalf of* -rights must be added to the *master* DocuSign account. For further information on how to do so, please have a look at CHAPTER 1.1.2 ACTIVATE THE SEND ON BEHALF OF RIGHTS – API IN DOCUSIGN ON PAGE 9.

Optionally, you may want the corresponding CRM records related to DocuSign to be automatically updated whenever a signing process has been finished. In order to guarantee this behavior, the DocumentsCorePack DocumentsCorePackServerDocuSign.zip must be installed. For further information on how to do so, please have a look at CHAPTER 1.1.3 HOW TO INSTALL THE ADDITIONAL DOCUMENTSCOREPACKSERVERDOCUSIGN.ZIP SOLUTION ON PAGE 10.

Having set these steps, you can start to create DocumentsCorePack templates including DocuSign fields. Learn how to do so in CHAPTER 2.1HOW TO CREATE A DOCUMENTSCOREPACK TEMPLATE FOR DOCUSIGN ON PAGE 19.

1.1.1 How to add a user to a DocuSign account

To be able to add a user to DocuSign, you need a DocuSign account. Please [register to DocuSign here] if you have no account yet.

Once you have created such a DocuSign account, log in to it, go to *Admin*, and select *Users*.

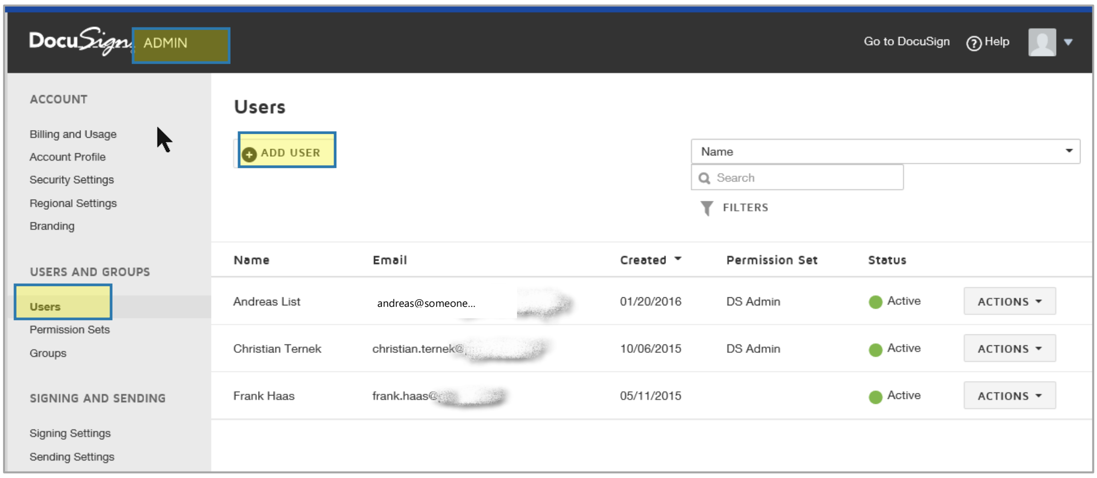


Figure 1: DocuSign – Add user

To add a new User simply press on the ***[Add user]***-button and enter the new user.

Now you will see that the status of your new User is *Pending*.

Figure 2: DocuSign – User status pending

In the meantime, the user will receive an email containing information on how to activate his account and how to enter a password.

However, if you want to open the currently signed in DocuSign user in Microsoft Dynamics 365 with a click on the ***[DocuSign Users]***-button, you will not find any related record.

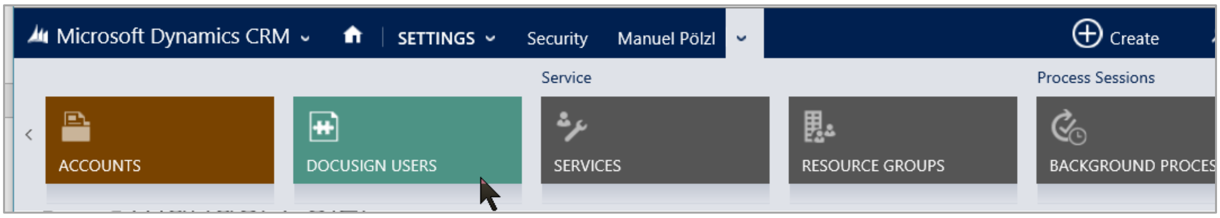


Figure 3: Microsoft Dynamics 365 – DocuSign user not found

This is why:
DocuSign will look at the first *DocuSign*-action. If there is a DocuSign account matching the Microsoft Dynamics 365 user-email, DocuSign adds the record and it is visible in the DocuSign user section in Microsoft Dynamics 365. If not, it is invisible.

In order to guarantee the visibility of the user in Microsoft Dynamics 365, the user should open a random contact or account in Microsoft Dynamics 365 and then press on the *Go To DocuSign*-field.

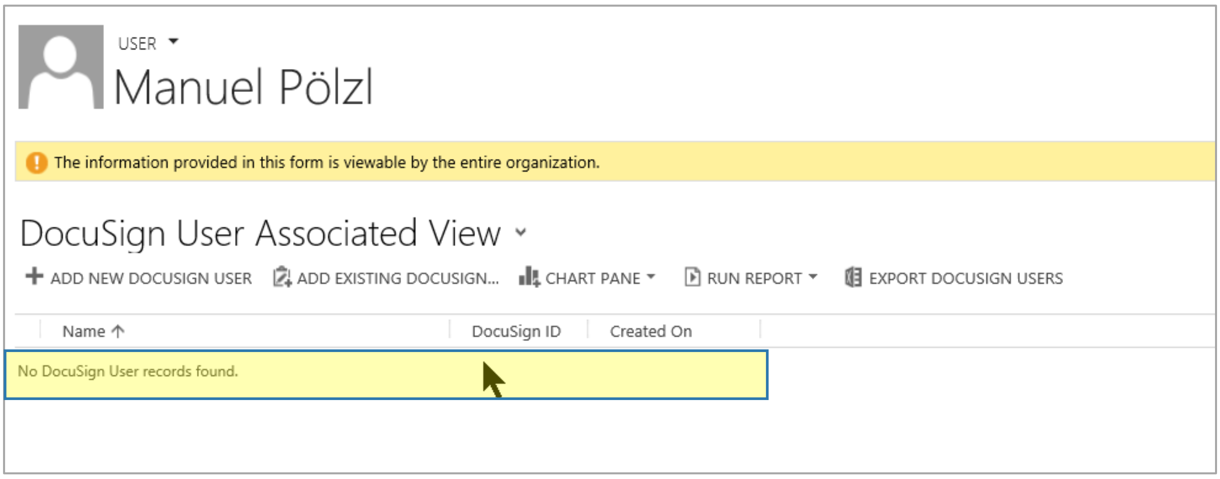


Figure 4: Microsoft Dynamics 365 – DocuSign user associated view – user is invisible

Figure 5: Go To DocuSign-field

If DocuSign *recognizes* the user, the Welcome-Screen appears:

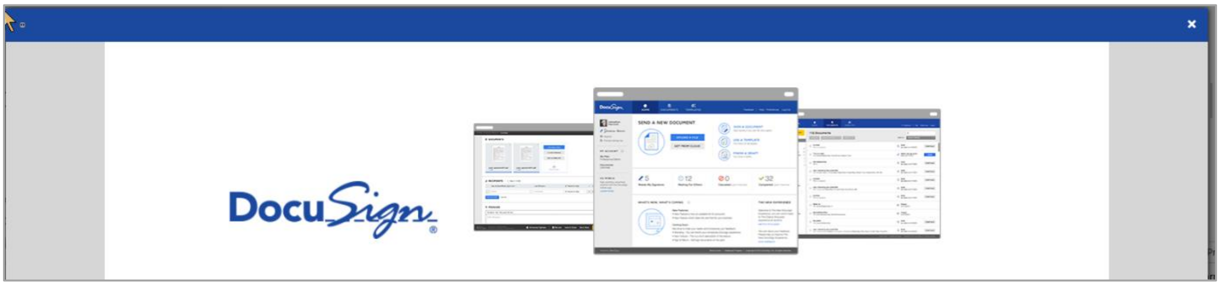


Figure 6: DocuSign Welcome Screen

If not, or if the screen remains white, please contact our support via support@mscrm-addons.com.

But usually, the DOCUSIGN USERS record should be visible now.

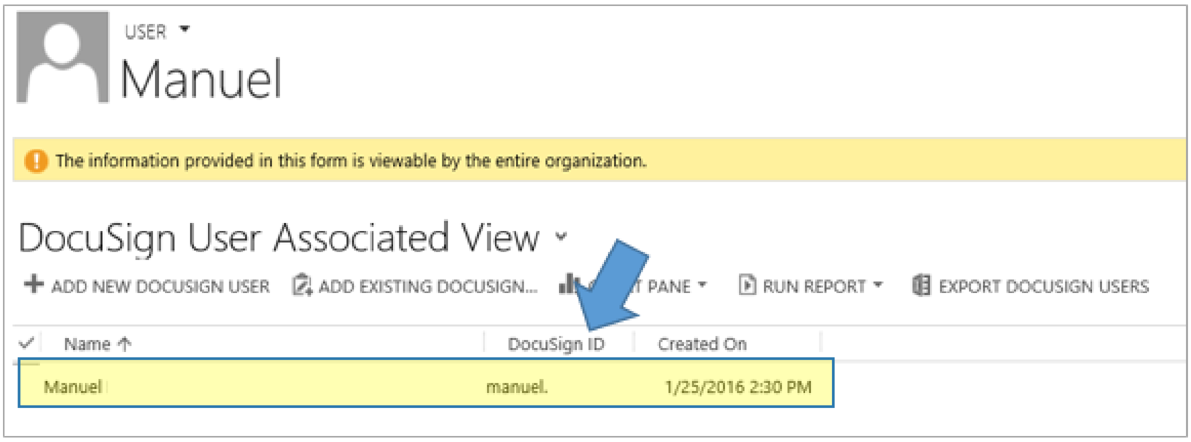


Figure 7: Microsoft Dynamics 365 – DocuSign user associated view – user is visible

1.1.2 Activate the Send on behalf of rights – API in DocuSign

In order to send a *DocuSign* document in the name of a user, the *Send on behalf of rights*-API must be activated in the *master* DocuSign-Account.

In order to do so, simply log in to Microsoft Dynamics 365 as the *master* user (this is the one who is also connected to the *master DocuSign* account. Next, open an account in Microsoft Dynamics 365 and then, open DocuSign with a click on the ***[Go to DocuSign]***-button.

As soon as you have been logged in to DocuSign, change to *Preferences* and select *Permissions* in the *Member Menu*.

Make sure that the Send on behalf of rights (API) checkbox is checked.

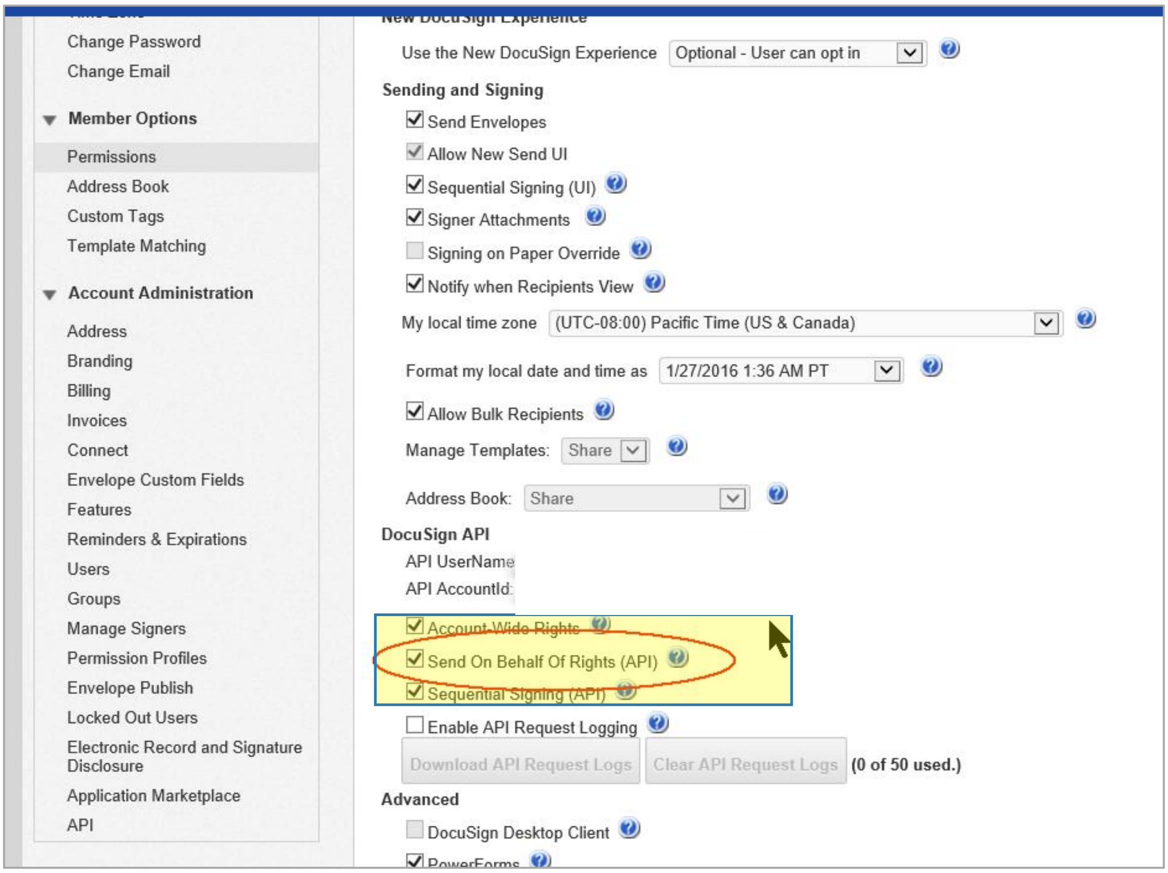


Figure 8: Send On Behalf Of Rights (API) - activated

1.1.3 How to install the additional DocumentsCorePackServerDocuSign.zip solution

Once the additional DocumentsCorePackServerSign.zip solution is installed, DocuSign will automatically update the corresponding CRM records whenever a signing process has been finished.

Once installed, the update will work automatically for the following entities:
- Account
- Contact
- Lead
- Quote
- Opportunity
- Invoice
- Sales Order

Should you require further entities to be updated automatically, a custom action has to be established in Microsoft Dynamics 365. Learn how to do so in CHAPTER 1.1.5 HOW TO CREATE CUSTOM ACTIONS ON PAGE 13.

However, please follow the instructions below in order to install the solution first.

Step 1: Open your solutions in Microsoft Dynamics 365

In order to do so, please navigate to Settings 1 and click on Solutions 2 in Microsoft Dynamics 365.

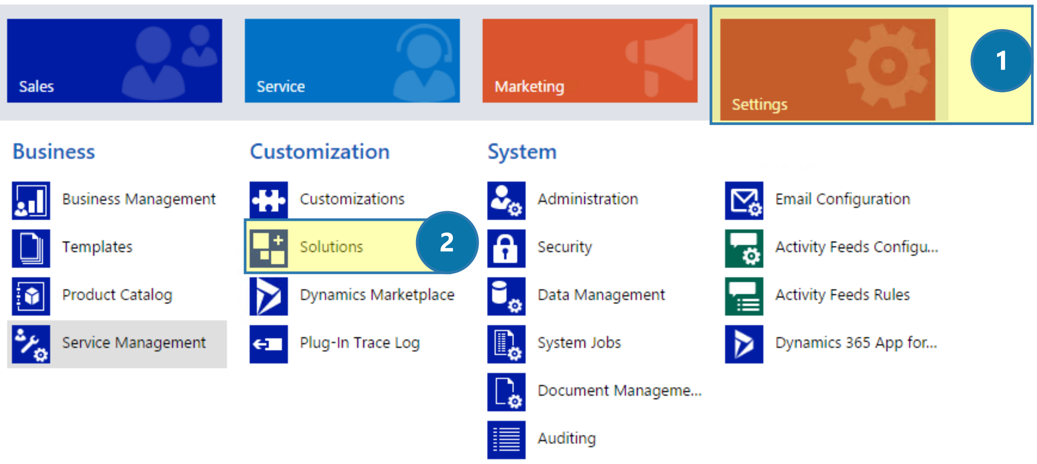


Figure 9: Open the solutions in Microsoft Dynamics 365

Step 2: Import the solution

In order to do so, simply click on the ***[Import]***-button 1 in the *All Solutions*-section. In the so opene*d Import Solution*-window 2, select the *.zip file that contains the solution you want to import from the explorer 3 and click on the ***[Next]***-button 2.

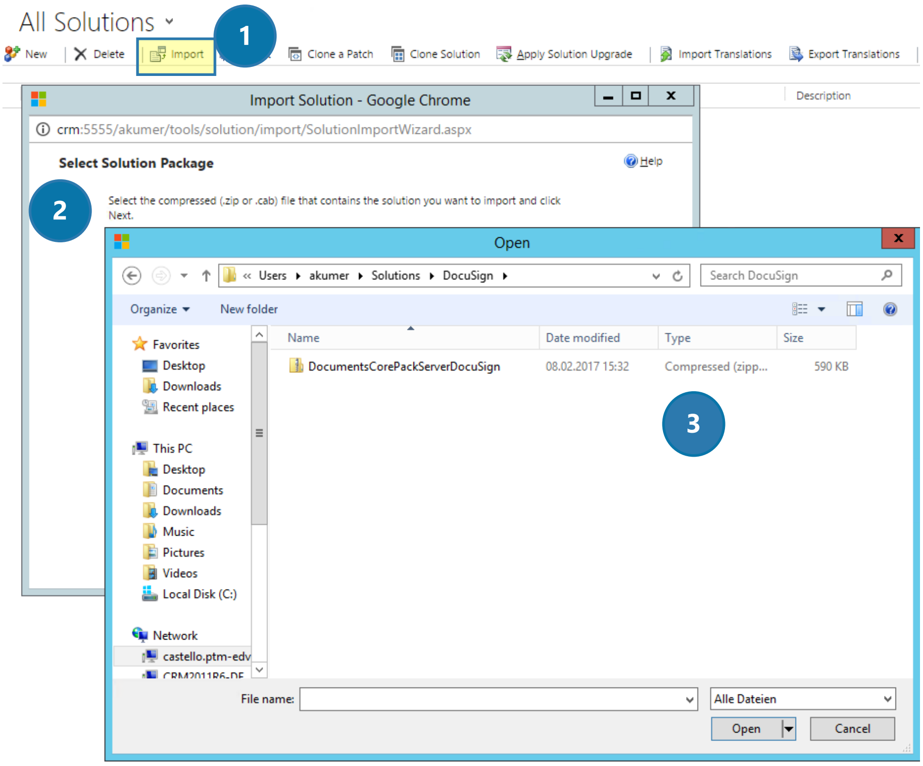


Figure 10: Import the solution

1.1.4 How to set the DCPDocuSignWorkflow

In addition to the already installed DocumentsCorePackServerDocuSign.zip solution, also a certain workflow has to be activated by creating the following settingskey.

This workflow is called DCPDocuSignWorkflow. It sends the documents to DocuSign for signing.

To do so, please navigate to Settings > MSCRM-ADDONS.com Products and select AutoMerge with a click on it.

Next, click on the ***[Add New MSCRM-ADDONS.com Settingskey]***-button in the command bar.

In the so opened window, insert the following data:

Name	DocuSignWorkflow
IsCached	Yes
KeyValue	DCPDocuSignWorkflow

Optionally a second workflow named DCPDocuSignWorkflowGuarded is available. This workflow starts the first workflow and waits until DCPDocuSignWorkflow is ready. If you receive an error during the execution of this workflow, the owner of the AutoMergeWorkingItems will be informed via e-mail. To activate this workflow please change the KeyValue of the settingskey to "DCPDocuSignWorkflowGuarded".

That's it! For some more detailed information on how to create a settingskey manually, please have a look at this blog article.

1.1.5 How to create Custom Actions

Using the latest version of DOCUSIGN_DYNAMICSCRM 5.2 with the additional DOCUMENTSCOREPACKSERVERDOCUSIGN.ZIP SOLUTION 1.7 you won´t need to create Custom Actions anymore. There is a global Custom Action, which is already installed. This means you don´t have to create Custom Actions for every entity.

If you still use version 5.1 follow this instruction:
Next, to automatically updated entities, you may also want to create some individual entities to be updated automatically. To do so, a custom action has to be established in Microsoft Dynamics 365. This step-by-step tutorial explains how to do so.

Step 1: Create a new process
First of all, please navigate to Settings > Processes in your Microsoft Dynamics 365. Next, click on the ***[New]***-button in the *My Processes*-section.

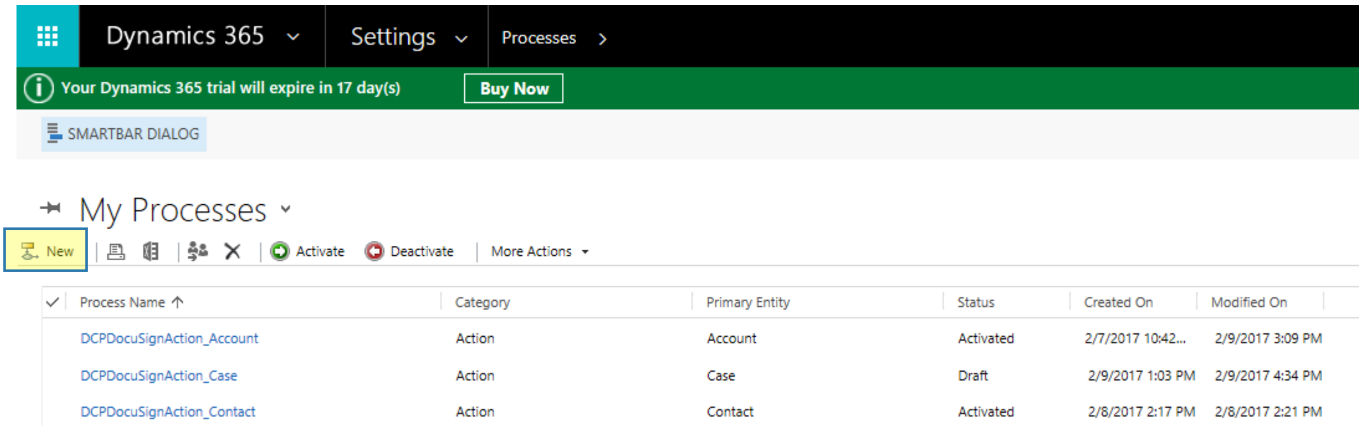


Figure 11: My Processes section

Please create a new process in the so opened window. As you can see, you must enter a Process Name, Category and an Entity.

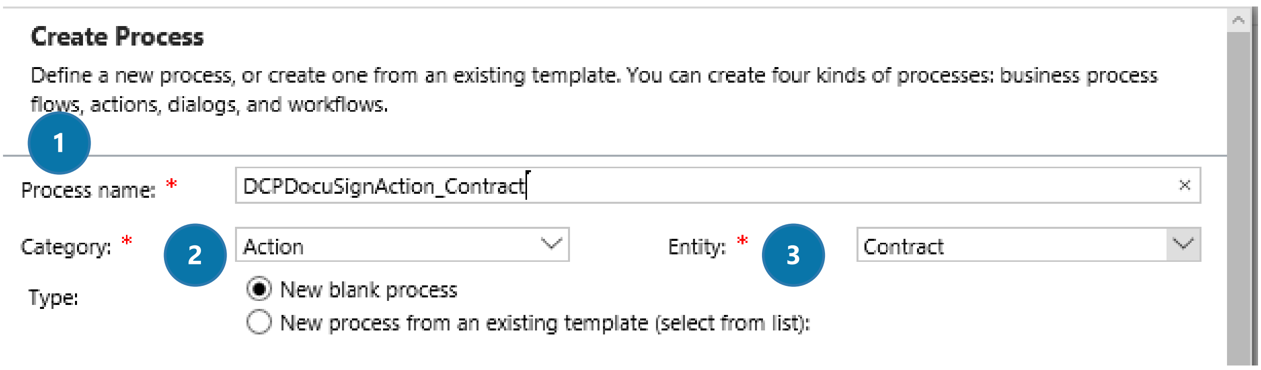


Figure 12: Define the settings of the new process

Please make sure that they follow this pattern when creating a new process:

❶ Process name:* The process name must start with DCPDocuSignAction_ and must end with the schema name of the entity. In this example, we refer to the entity *Contract*, so the Process name must be *DCPDocuSignAction_Contract*

❷ Category:* Please select *Action*

❸ Entity:* Please select the corresponding entity (here: *Contract*)

Step 2: Add a Process Argument

Next, add a process argument here. You can add a process argument with a click on the green ***[Add]***-button **(+)** 1.

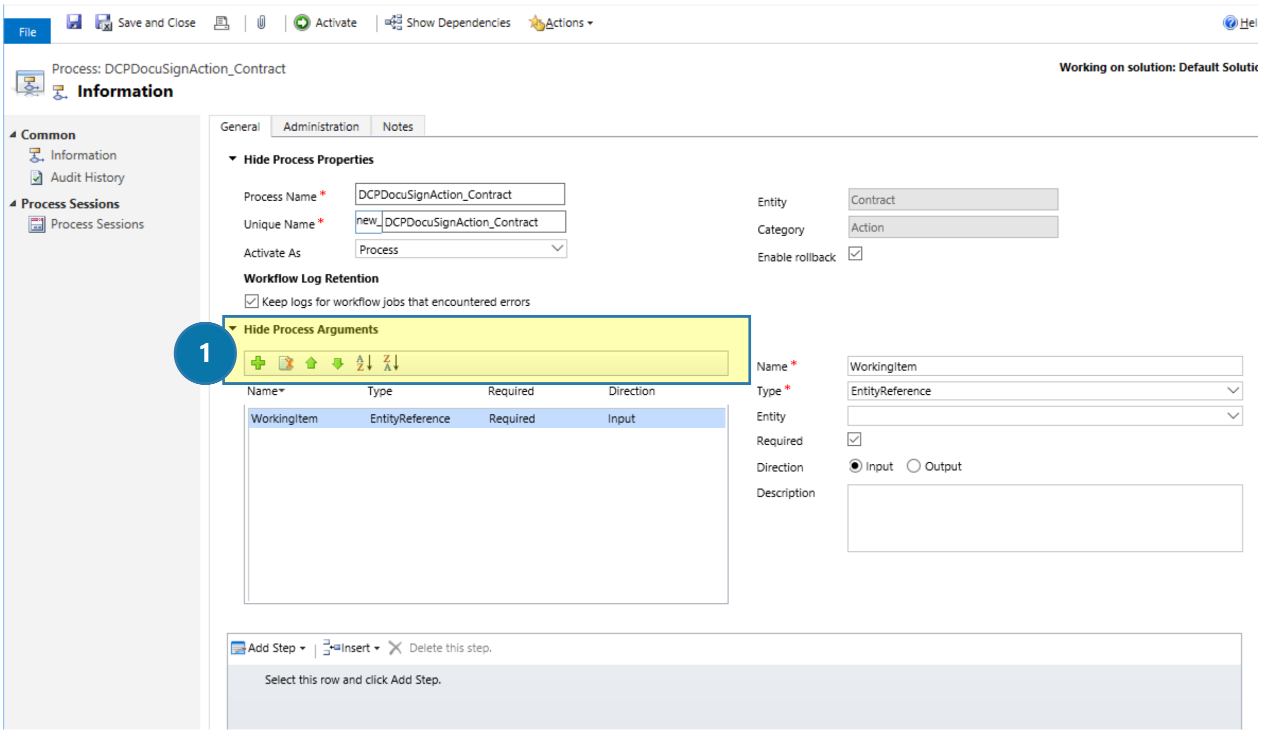


Figure 13: Add a Process Argument

Please enter the following arguments:

Name: WorkingItem
Type: EntityReference
Entity: mscrm-addons.com WorkingItem
Required: Yes
Direction: Input

Step 3: Add some steps
Next, you will have to add three steps:

*DocuSignIntegration Create Envelope
*DCPDocuSignStep UpdateEnvelope (including the parameters *envelope* and *workingitem*)
*DocuSignIntegration Get Signature (including the parameter *envelope*)

If you haven't created a workflow in Microsoft Dynamics 365 Online yet, please have a look at this [blog article](#).

First of all, please add the *DocuSignIntegration Create Envelope* – Step. It does not require further attention.

Next, please create the DCPDocuSignStep UpdateEnvelope. When creating this step, you will have to set some parameters. To do so, please click on the ***[Set properties]***-button and set the corresponding parameters shown marked in the *Set Custom Step Input Properties*-dialog.

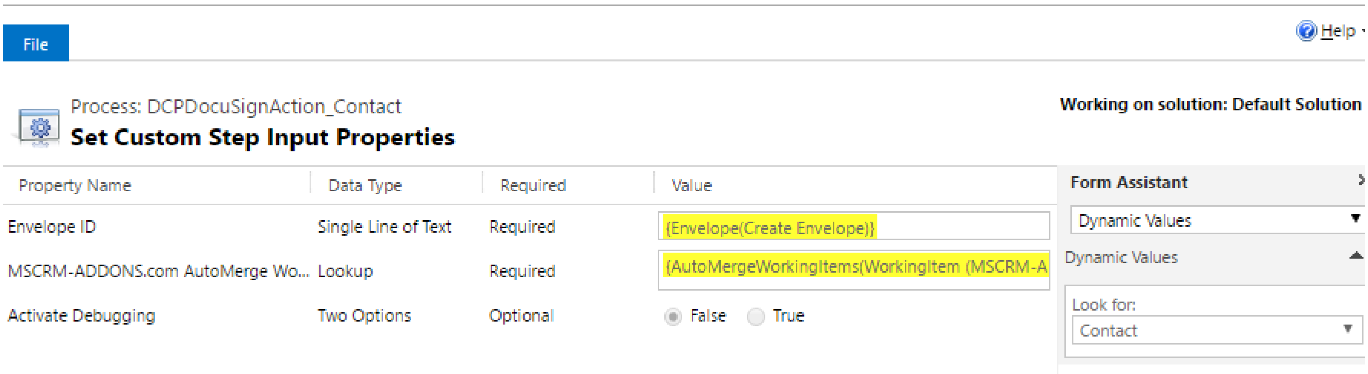


Figure 14: Add the DCPDocuSignStep UpdateEnvelope

The third step that must be created is the DocuSingIntegration Get Signature step. Also, in this case, you will have to set some parameters. To do so, please click on the ***[Set properties]***-button and set the corresponding parameters marked below in the *Set Custom Step Input Properties*-dialog.

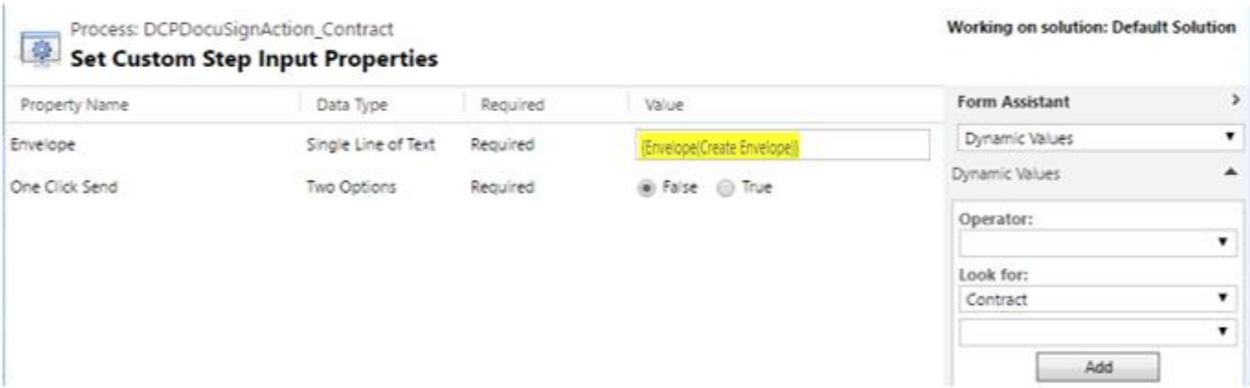


Figure 15: Add the DocuSingIntegration Get Signature

Step 4: Publish the so created action

Once you have added all steps, please publish the so created custom action.

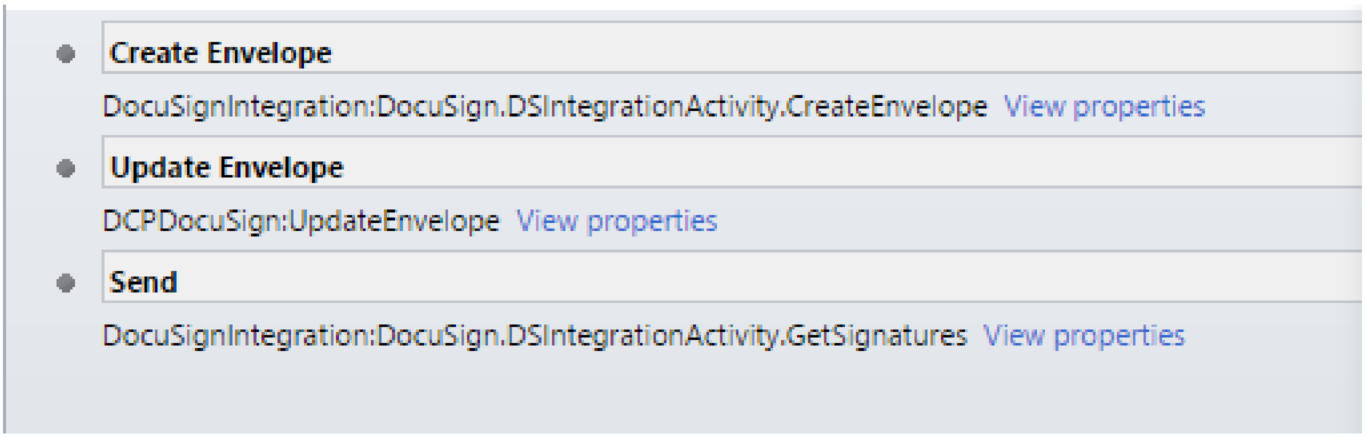


Figure 16: Created steps

That's all you have to do. It is only important that the custom action exists – DocumentsCorePack automatically executes the custom action for the corresponding entity.

2 DocumentsCorePack templates for DocuSign

After you have created a DocuSign user in Microsoft Dynamics 365, and you have made sure that he has all the rights he needs, you must create a DocumentsCorePack template for DocuSign. This chapter outlines how to create such templates.

To get a quick overview, please read this blog and follow the included video.

2.1 How to create a DocumentsCorePack template for DocuSign

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 DocuSign 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

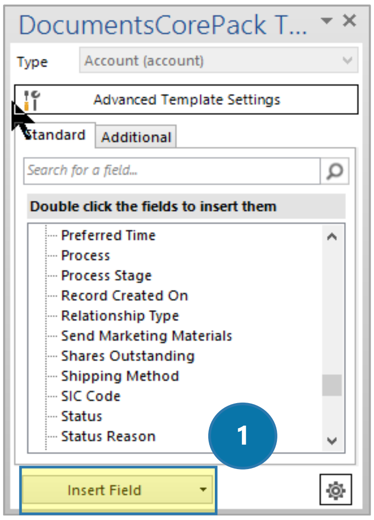


Figure 17: DocumentsCorePack Template Designer

Then, select the *Insert DocuSign Item* > for example Signature 2

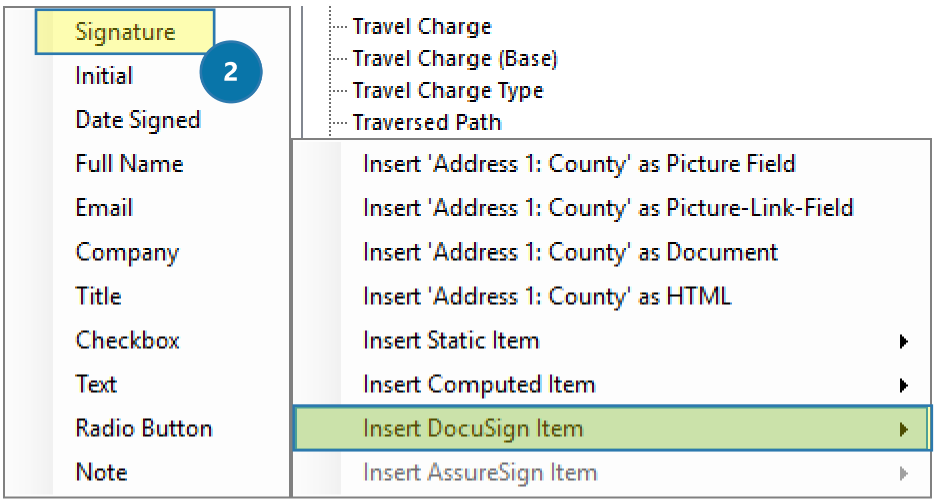


Figure 18: Insert DocuSign Item > Signature

2.1.1 DocuSign Items

Like you can see in Figure 18, there are several DocuSign Items you can select. These Items are shortly explained below. On the left side, you will see the placeholder fields and on the right side the outcome after you review and sign your document.

The Signature-Field

If you select *Signature*, a placeholder field will be inserted into your Word document.

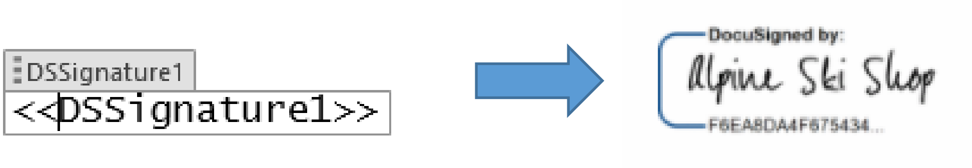


Figure 19: The Signature-Field

<u>Please notice:</u>

DS stands for DocuSign

Signature for the Type of the DocuSign-Field

1 stands for the next number. (we need this number to make every DocuSign-field unique)

The Initial-Field

With a click on *Initial*-Item, a placeholder field for the initials will be inserted. As you can see, this placeholder comes with the next number, in this case 2.

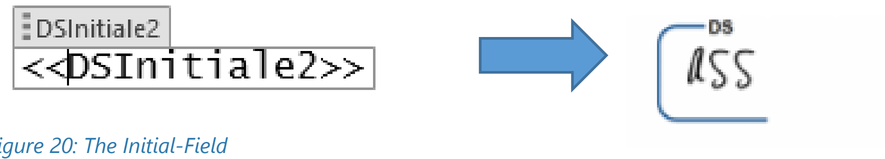


Figure 20: The Initial-Field

The Date Signed-Field

This placeholder field stands for the *Date* of signing and will automatically generate the current date.

Figure 21: The Date-Field

The Full Name-Field

This Item will insert you a placeholder field for the *Full Name*. The name, which belongs to the signature, will be automatically inserted into your document.

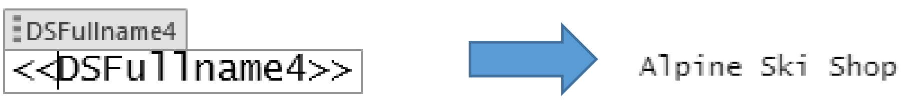


Figure 22: The Full Name-Field

The Email-Field

By selecting this Item, a placeholder field for the E*mail* will be added to your template.

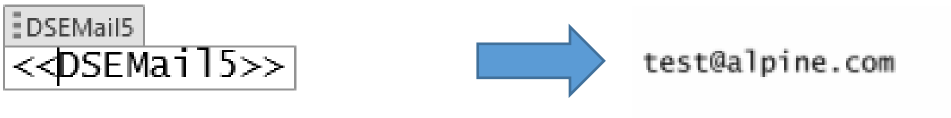


Figure 23: The Email-Field and

The Company-Field

Select the *Company* Item and this placeholder field will be inserted.

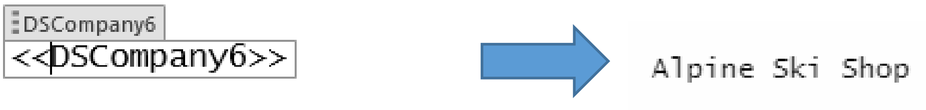


Figure 24: The Company-Field

The Title-Field

It is also possible to insert the *Title* by selecting this placeholder field.

Figure 25: The Title-Field

The Checkbox-Field

This Item will insert you a placeholder field for the C*heckbox*.

Figure 26: The Checkbox-Field

2.2 How to set the properties of a DocuSign field

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

This is only possible when you have already inserted such a field. Please find a brief description on how to insert a DocuSign field into a DocumentsCorePack template in CHAPTER 2.1 HOW TO CREATE A DOCUMENTSCOREPACK TEMPLATE FOR DOCUSIGN ON PAGE 19.

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

Figure 27: Selected DocuSign field - Signature

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

Please find a brief instruction of the Field Properties functionalities in CHAPTER 2.2 HOW TO SET THE PROPERTIES OF A DOCUSIGN FIELD ON PAGE 22.

2.2.1 DocuSign Properties-window functionalities

Depending on the field type you have selected previously, the DocuSign Properties may vary, but most of the time, you will use only two different properties (the one for the signature and the one for the name). The *Field properties* for these fields are to be explained in the course of this chapter.

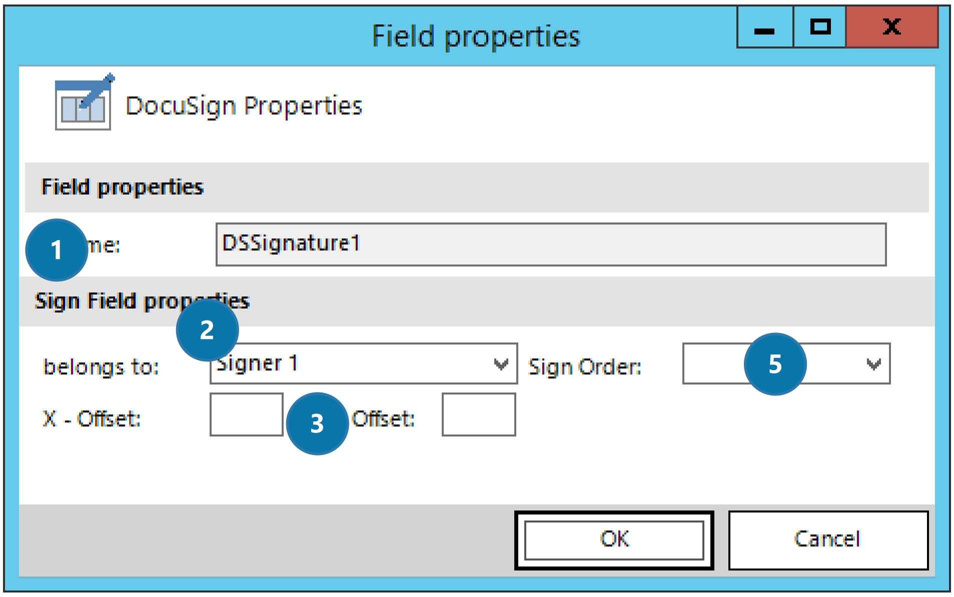


Figure 28: DocuSign Properties - Signature

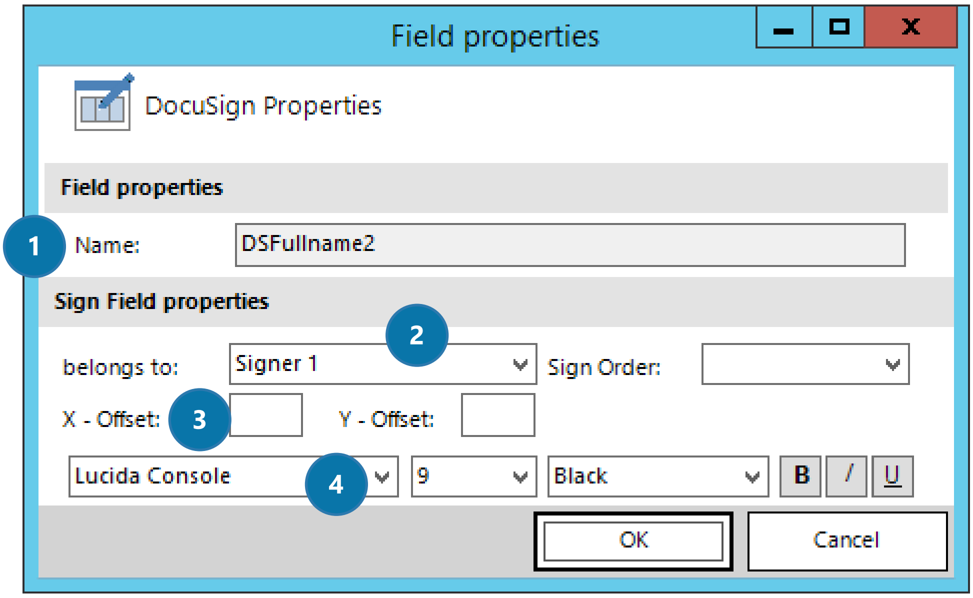


Figure 29: DocuSign Properties - Text

1 Name

Defines the field-name in the DocumentsCorePack template.

2 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.

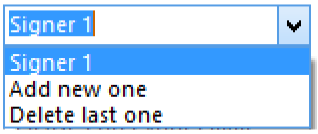


Figure 30: Select, add or delete signer

3 X- and Y-offset

To adjust the DocuSign field you can set X- and Y- Offset. While the X-Offset sets the horizontal offset of the field, the Y-Offset sets the vertical offset of the field. However, both accept the usage of negative values.

4 Font

Enables you to change the font setting of the DocuSign field. The font can be set in different styles, sizes and colors, as well as in bold, italics or underlined.

5 Sign order

Allows you to create a certain sign order starting with "1" for the first signee, "2" for the second and so on. If you leave this field empty, the signees will be structured automatically after the *belongs to*-field. Say, signer 1 will be the first to sign, signer 2 will be the second … etc. If you want all signees to sign at the same time, please insert "1" in all sign-order fields of all field property windows.

3 Additional DocuSign Fields (Advanced)

However, there are 3 more menu entries for DocuSign fields, which are available by using the latest version of DOCUSIGN_DYNAMICSCRM. The new features enable users to work with DocuSign on an advanced level. These 3 fields are: The *Text*-field, the *Note*-field and the *Radio Buttons*-field.

The Text-Field

In contrary to usual placeholder fields, the placeholder of the text field looks slightly different.

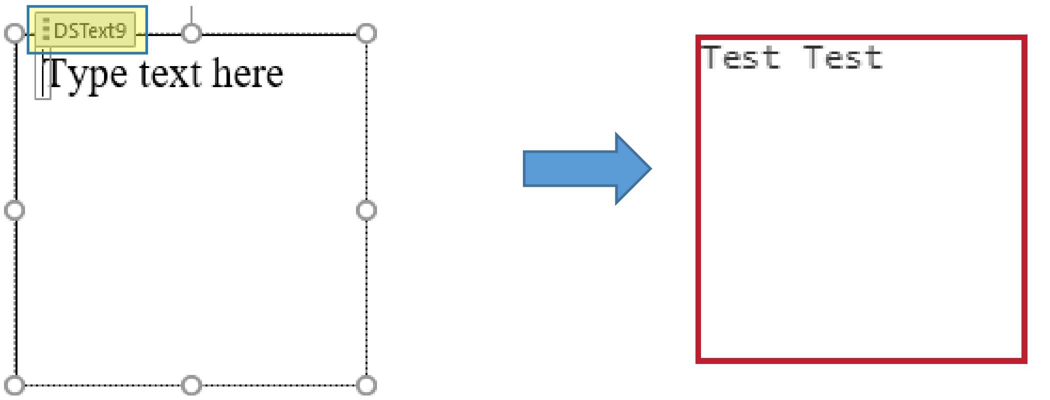


Figure 31 The Text-Field

The symbol above highlighted in yellow stands for *Content Control*, which saves additional information about your field. As you noticed before, every field has the *Content Control*-Symbol.

In contrary to the other fields, the *Text*-Field allows you to change the default text. Please be careful and do not delete the *Content Control* by accident. Without DocumentsCorePack will not work for this field. You can see the *Content Control*-Symbol by clicking into the placeholder field. This information is also valid for the *Note*-Field.

Also, the text field properties do have some more settings. Next to the default settings, which are explained in detail in the previous chapter, they offer some more settings, which will be explained below. The text from the textbox will be shown in the DocuSign Text field.

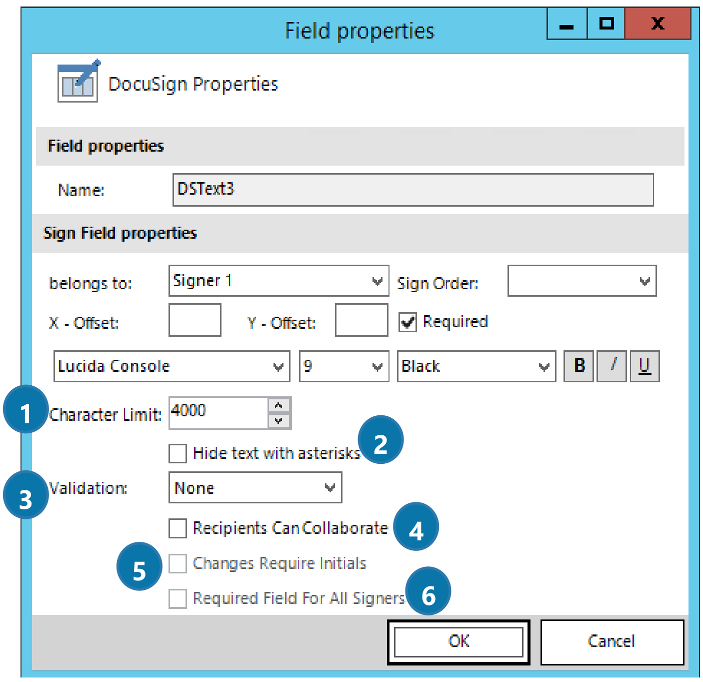


Figure 32 Field properties for Text-Field

❶ Character limit
Sets a limitation on the length of the field.

❷ Hide text with asterisks
Hide the text for the other signers by checking this checkbox.

❸ Validation
Select a validation pattern for the field.

❹ Recipients Can Collaborate
Recipients have the permission to change the inserted value if you check this checkbox.

❺ Changes Require Initials
Check this checkbox in order to save changes together with the initials of the person who has changed the field previously.

❻ Required field for all signers
All signers are required to fill out the field if you check this checkbox.

The Radio Buttons-Field

In contrary to the field above mentioned, the placeholder of the Radio Buttons field looks pretty much like a usual placeholder.

Figure 33 The Radio Buttons-Field

But also, the Radio Buttons field properties do have some more settings. Next to the default settings, which are explained in detail in the previous chapter, and the text field settings, which are explained on the previous page, they offer some more settings, which will be explained below. The Radio Button is simply a placeholder for the selectable fields.

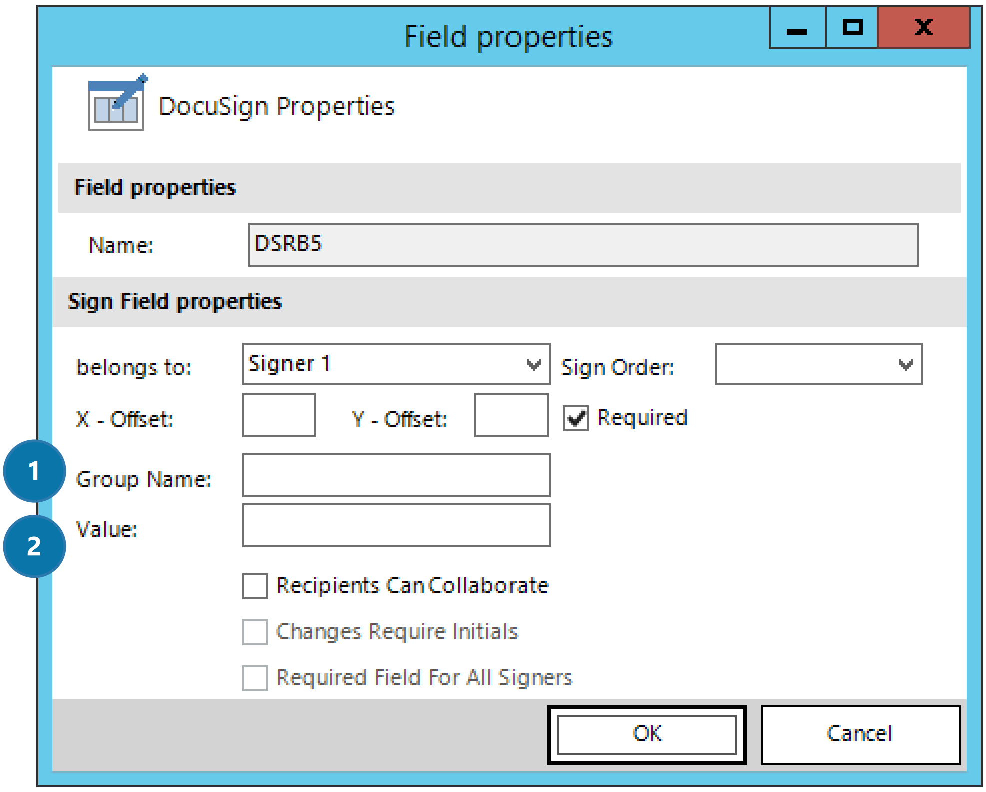


Figure 34 DocuSign Properties for Radio Buttons-Field

1 Group Name

Here, the name of the Radio button group must be inserted. By this name, the Radio buttons are "connected" to a group. Only one Radio button can be selected from a group.

2 Value

Please set the value of the Radio button here.

The Note-Field

In contrary to usual placeholder fields, the placeholder of the note field looks slightly different. Due to the fact that you can change the default text, you should make sure that you do not delete the *Content Control* accidentally (see page 25 – Please note).

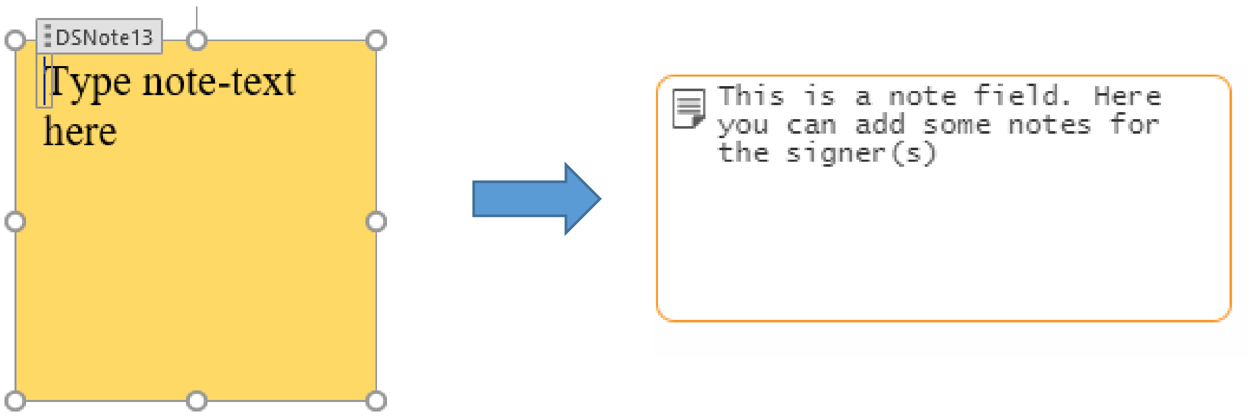


Figure 35 The Note-Field

This is what the note field properties look like. They contain the default settings, which are explained in detail in the previous chapter.

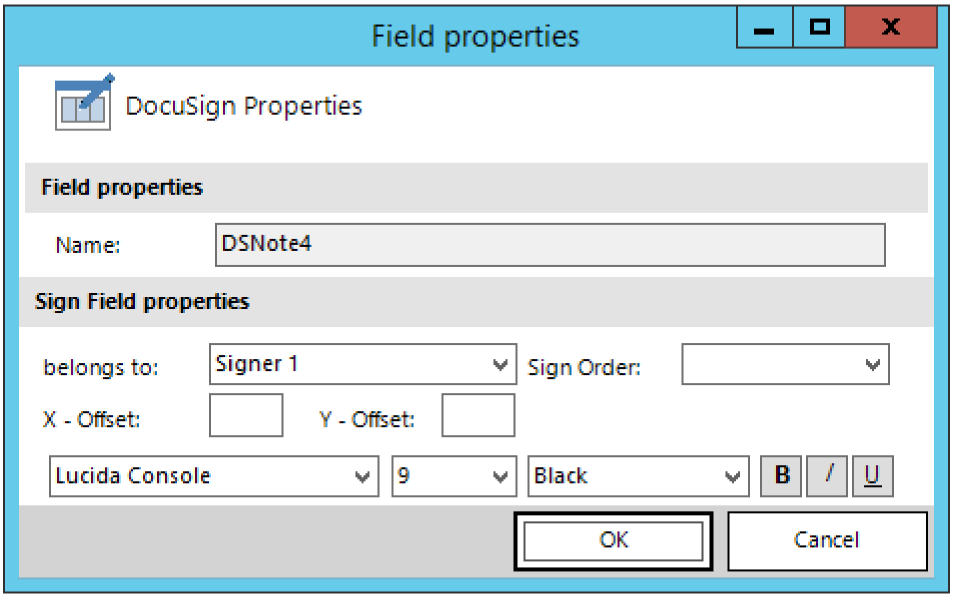


Figure 36 Field properties for Note-Field

The text from the textbox will be shown in the DocuSign Note field.

4 DocuSign Payment Field

Before you start to create a template with a payment field, please log in to your DocuSign environment. We need one information on the payment gateways to enable the setting in your template. You can find them when you click on *'Admin'* under the group Integrations -> Payments.

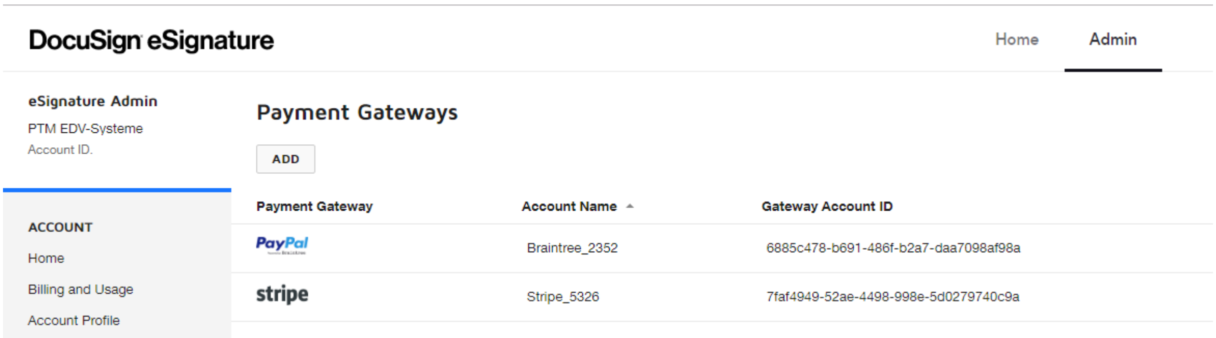


Figure 37 Information on the payment gateways

We will need the Gateway Account ID, please copy that value.

Now please open your template where you want to add the payment function. Click on '*Insert MailMerge Fields*' and then on the ***[Advanced Template settings]***-button. In the ① *Electronic Signature*-tab, you can find ② two settings. These two options are required to use the payment function. Please select the currency of the payment in the first field. Then paste the Gateway Account ID of the Payment Gateway into the second field. Click on the ***[OK]***-button to save these changes.

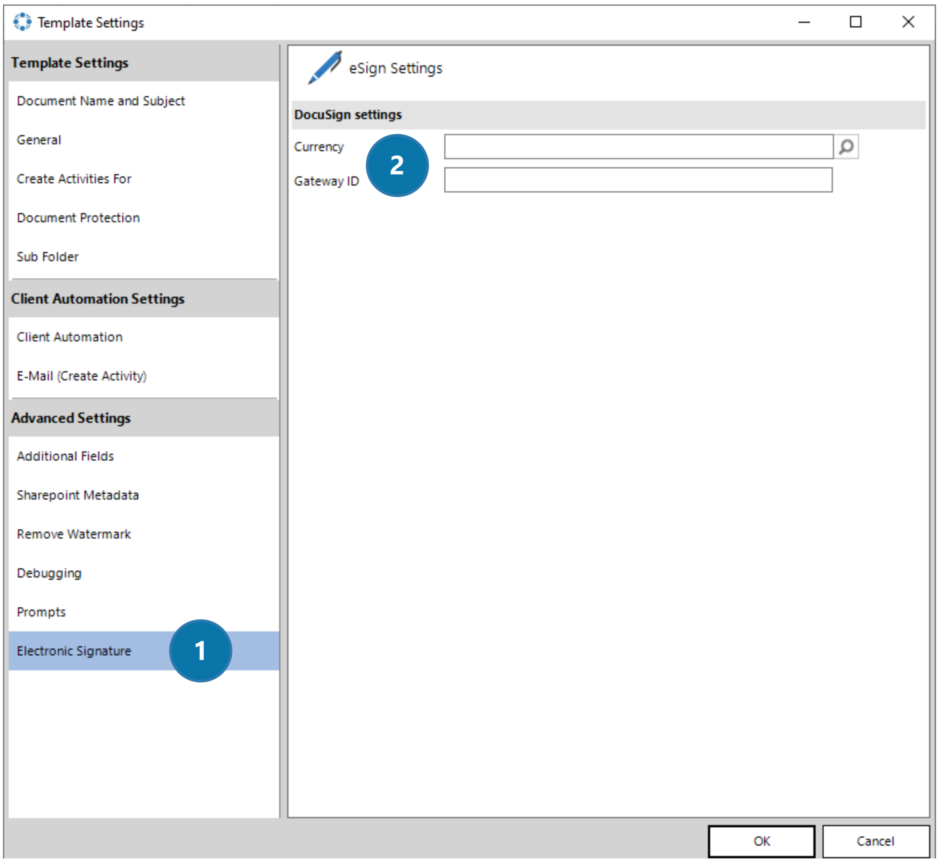


Figure 38 Required DocuSign settings

Now you are able to insert the payment sum field in your document. Click on the [Insert Field]-button there you can select the new field ‘Payment Sum’ as you can see highlighted in yellow below.

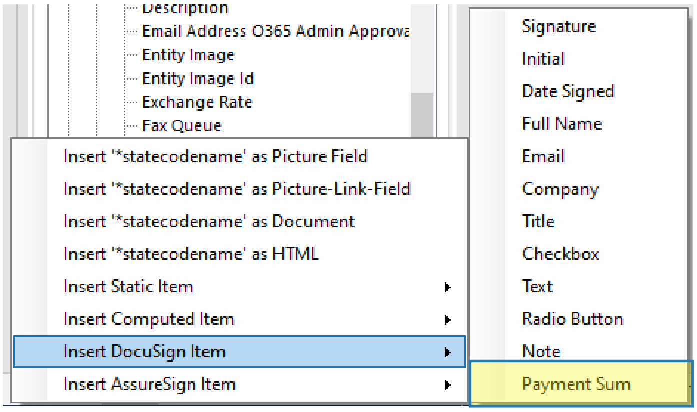
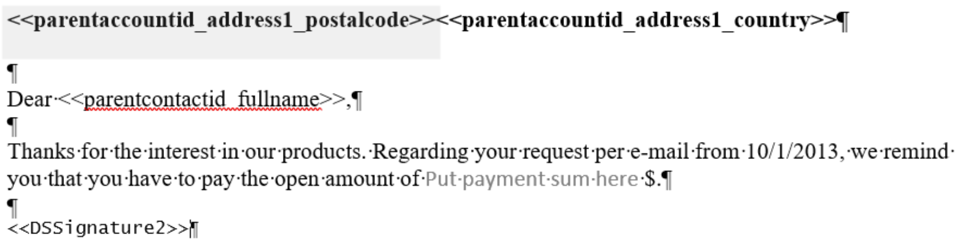


Figure 39 Information on the payment gateways

After inserting, you will see the payment sum field with the placeholder text. We have designed the field in that way that the text inside the field will be taken as an amount for the payment. This has the advantage that you either can type in the amount or place a field inside there or you could also use a computed field to do some calculations.

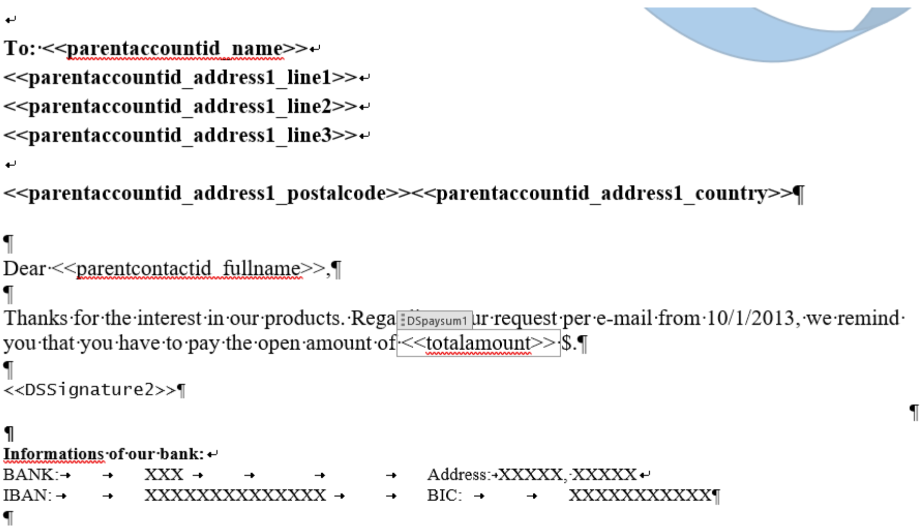


<<parentaccountid_address1_postalcode>><<parentaccountid_address1_country>>¶

¶
Dear·<<parentcontactid_fullname>>,¶
¶
Thanks·for·the·interest·in·our·products.·Regarding·your·request·per·e-mail·from·10/1/2013,·we·remind· you·that·you·have·to·pay·the·open·amount·of·Put·payment·sum·here·$.¶
¶
<<DSSignature2>>¶

Figure 40 The payment sum field placeholder

We, for example, have placed the field total amount inside the payment sum field as you can see below.



To:·<<parentaccountid_name>>
<<parentaccountid_address1_line1>>
<<parentaccountid_address1_line2>>
<<parentaccountid_address1_line3>>

<<parentaccountid_address1_postalcode>><<parentaccountid_address1_country>>¶

¶
Dear·<<parentcontactid_fullname>>,¶
¶
Thanks·for·the·interest·in·our·products.·Rega DSpaysum1 ur·request·per·e-mail·from·10/1/2013,·we·remind· you·that·you·have·to·pay·the·open·amount·of·<<totalamount>>·$.¶
¶
<<DSSignature2>>¶

¶
Informations·of·our·bank:
BANK: XXX Address: XXXXX, XXXXX
IBAN: XXXXXXXXXXXXXX BIC: XXXXXXXXXXX¶
¶

Figure 41 Example for the payment sum field

You will have to set an offset for the DocuSign field so that they are in the correct position. The 1 offset can be set in the *Field properties* of the DocuSign fields (X- Offset and Y – Offset) as you can see below.

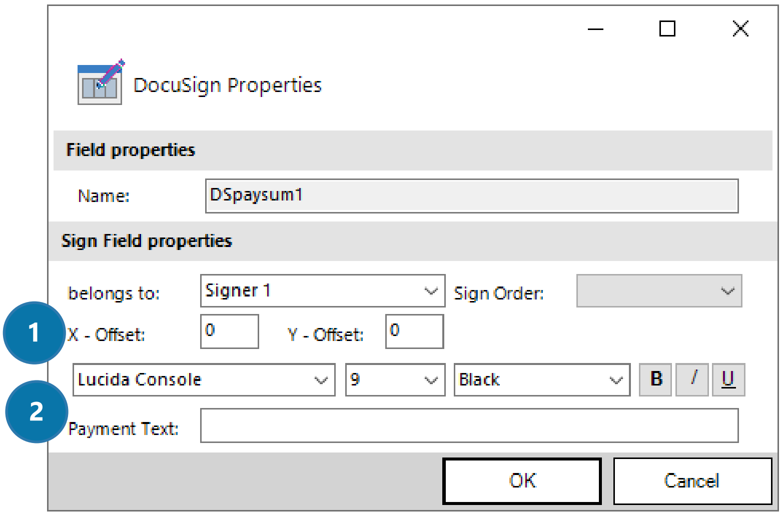


Figure 42 Set offset in the Field properties

Please do some test runs to get the correct offset values. It depends on the position of the fields. The 2 payment text setting is optional. You can set an additional text which will be shown in the Payment dialog.

After that, you can save the template in your Dynamics 365 by using the *'Save template'*-function. To test the feature click on the ***[Create Document]***-button and select attach document *'as DocuSign email'*-option.

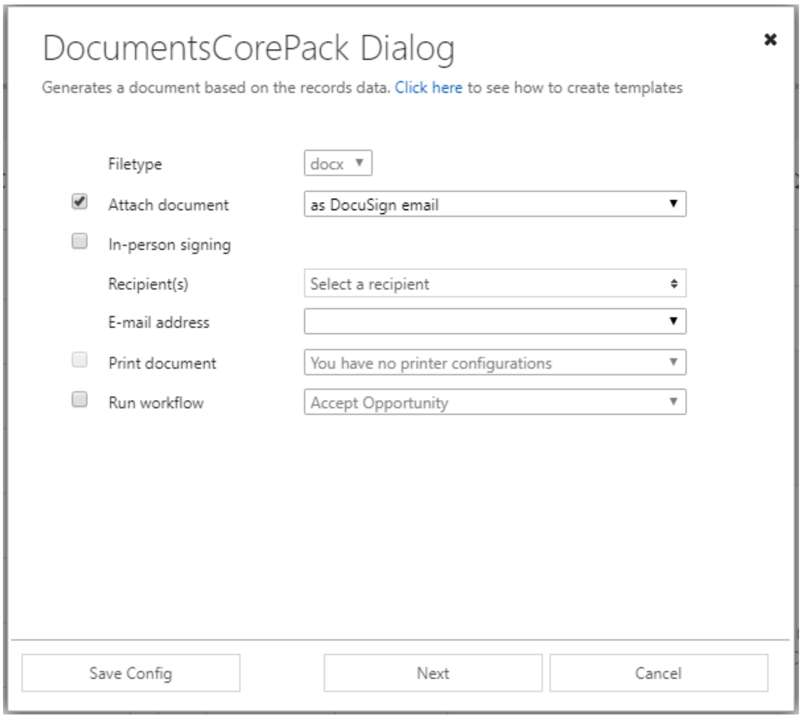


Figure 43 DCP Dialog: Attach document as DocuSing email

The result looks like in the figure below.

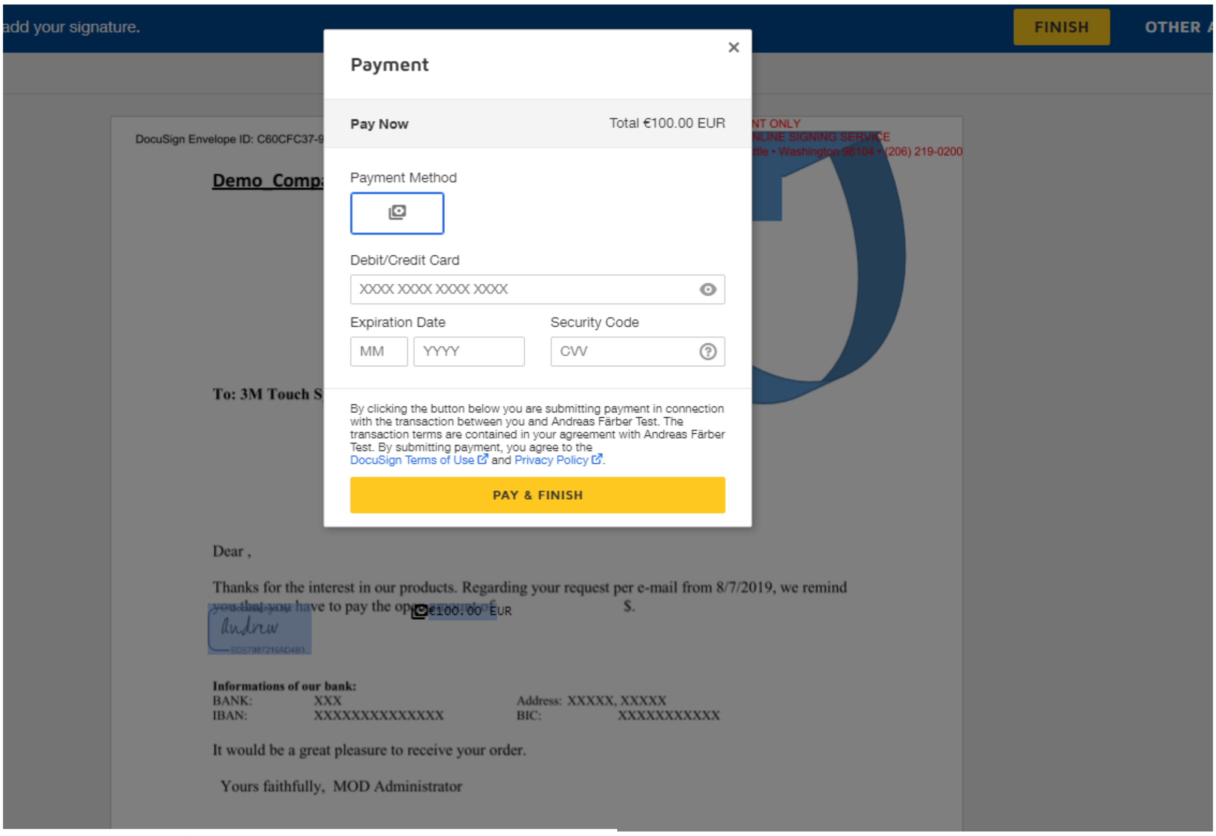


Figure 44 Payment field result

Currently, it is only possible to insert one payment sum field for one recipient. More payment fields are currently not possible due to the limitation of DocuSign and to avoid mismatches of the payment amount.

5 Tutorials (“How To’s”)

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

5.1 How do I merge a document and send it to DocuSign?

In Microsoft Dynamics 365, open for e.g. an account and then press the ***[Create Document]***-button in order to create a new document.

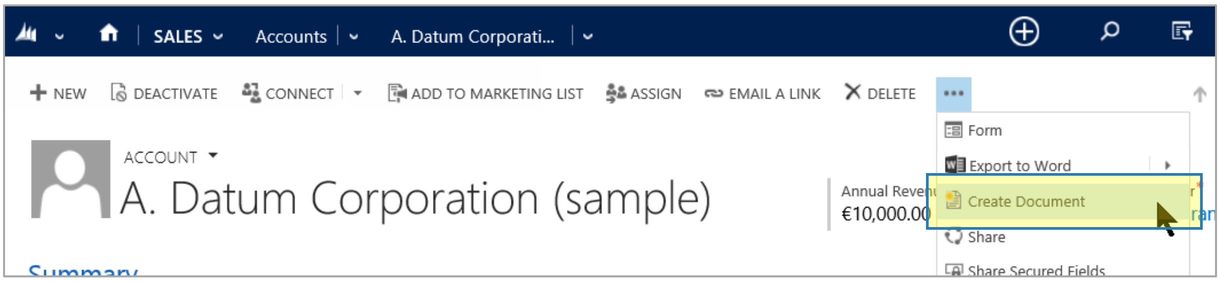


Figure 45: Create document

Select the template you would like to use.

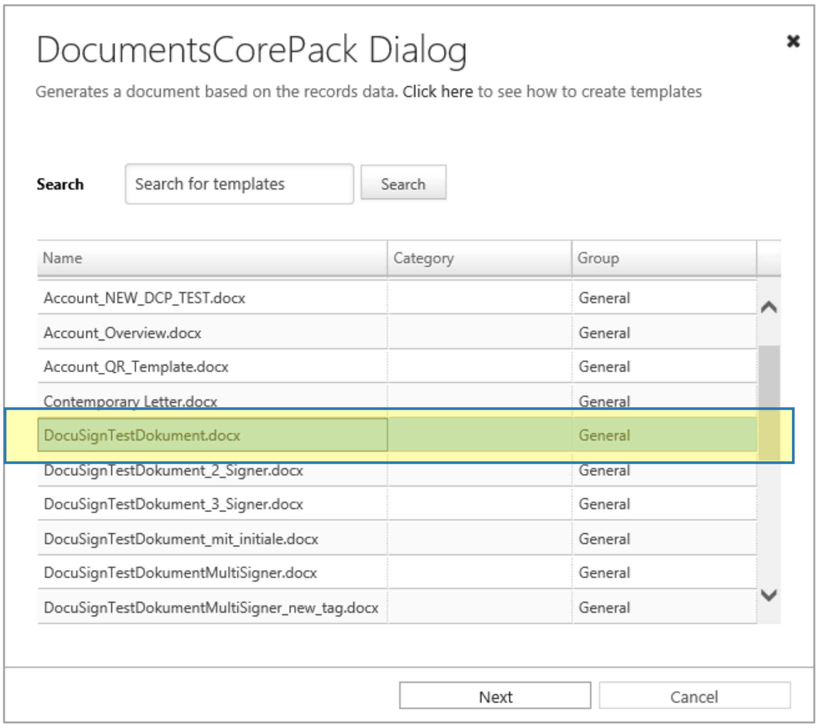


Figure 46: DocumentsCorePack Dialog

In case you want to change the Email-recipient you can do this here:

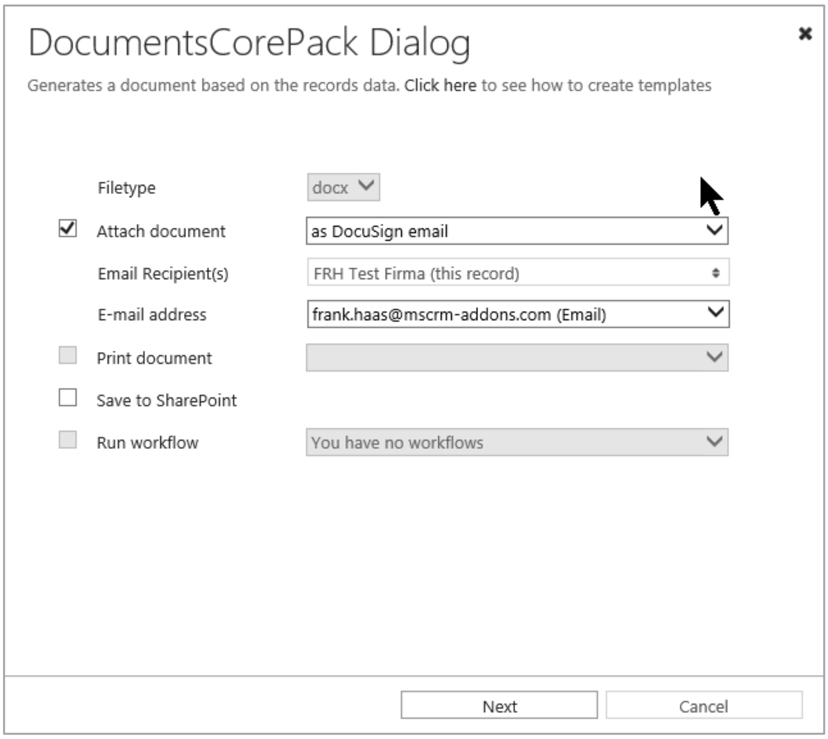


Figure 47: DocumentsCorePack Dialog

Click on the ***[Next]***-button and the document will be merged. You can check it before you forward it to DocuSign.

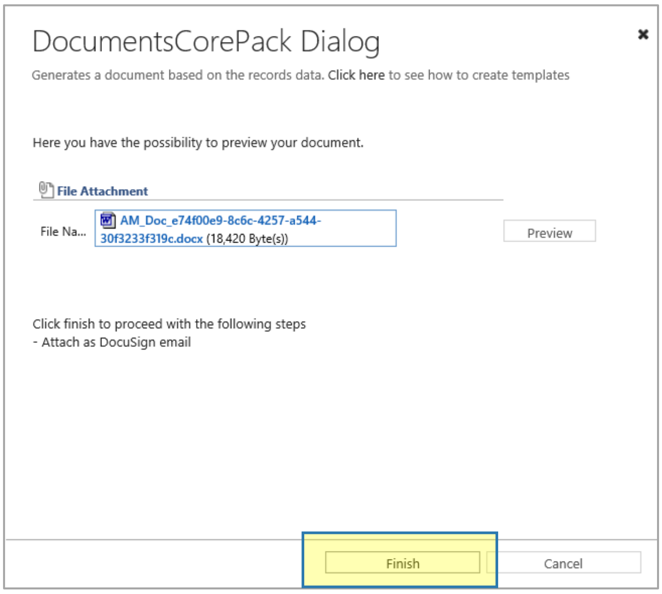


Figure 48: Click on the [Finish]-button

In order to proceed, click on the ***[Finish]***-button and send the document to DocuSign.

5.2 How do I sign a document in DocuSign?

Open the Link in the Email you have received from DocuSign to start signing.

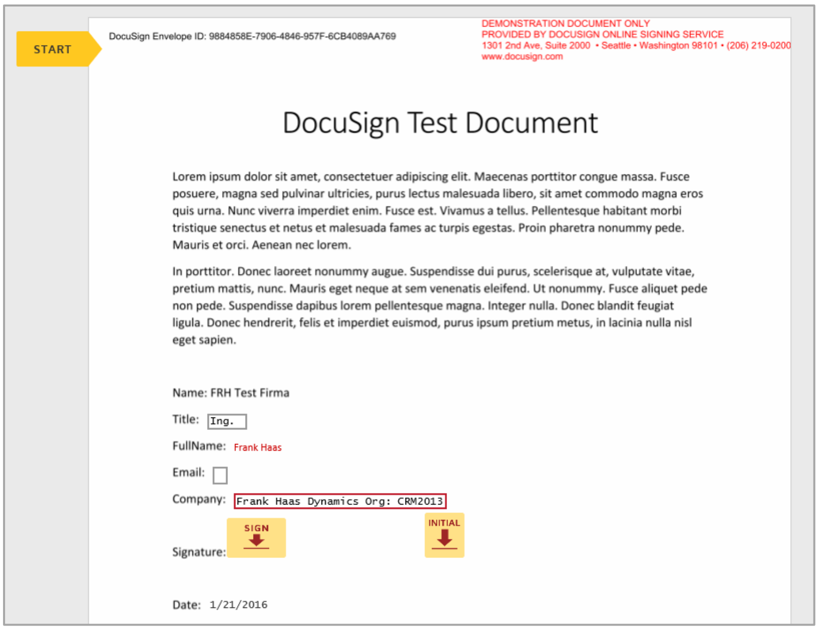


Figure 49: DocuSign document

Simply follow the instructions on the site to sign it.

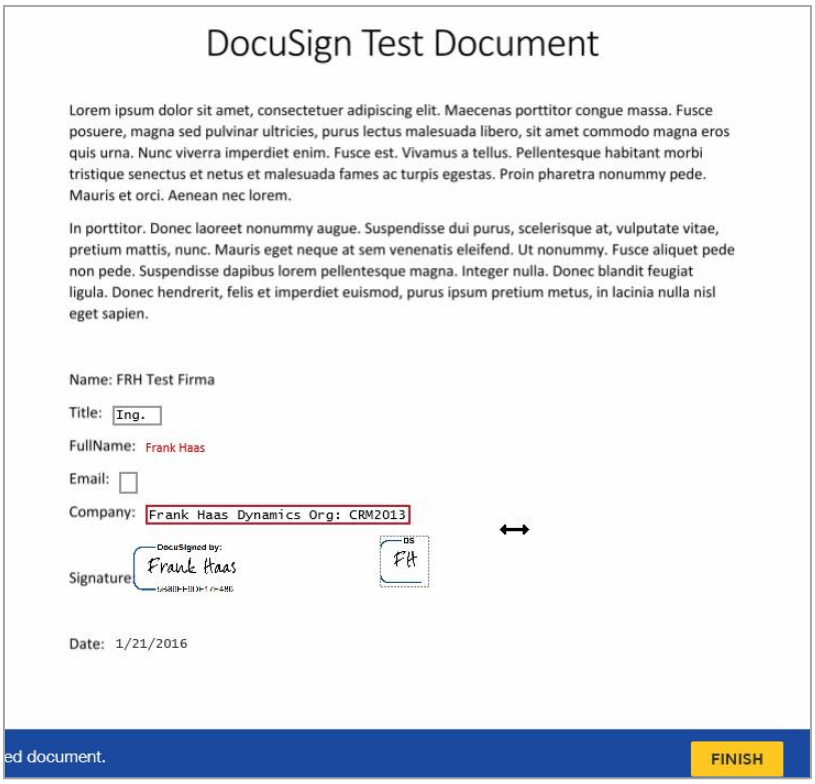


Figure 50: Follow the instructions in order to sign the document

Click on finish and you have signed your first document. Congratulations!
You will get an email with the signed document attached:

DocuSign Envelope ID: 9884858E-7906-4846-957F-6CB4089AA769

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
1301 2nd Ave, Suite 2000 • Seattle • Washington 98101 • (206) 219-0200
www.docusign.com

DocuSign Test Document

Lorem ipsum dolor sit amet, consectetuer 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. Suspendisse dapibus lorem pellentesque magna. Integer nulla. Donec blandit feugiat ligula. Donec hendrerit, felis et imperdiet euismod, purus ipsum pretium metus, in lacinia nulla nisl eget sapien.

Name: FRH Test Firma

Title: Ing.

FullName: Frank Haas

Email:

Company: Frank Haas Dynamics Org: CRM2013

Signature: DocuSigned by: Frank Haas   DS FH

Date: 1/21/2016

Figure 51: DocuSign document attached to email

While in Microsoft Dynamics 365, you will see a post added to your entity:

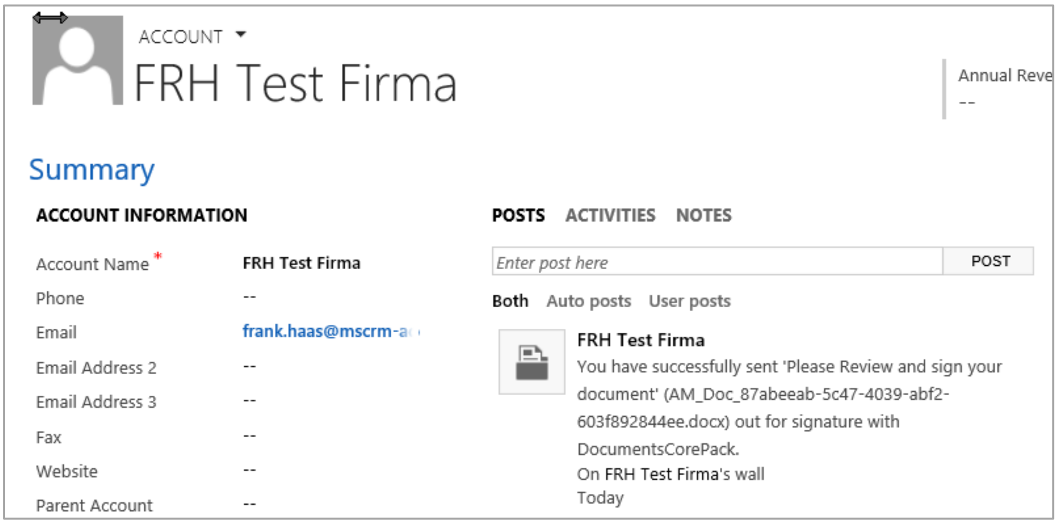


Figure 52: Post added to account

Click on the *Notes*-field. There, you will find the completed documents.

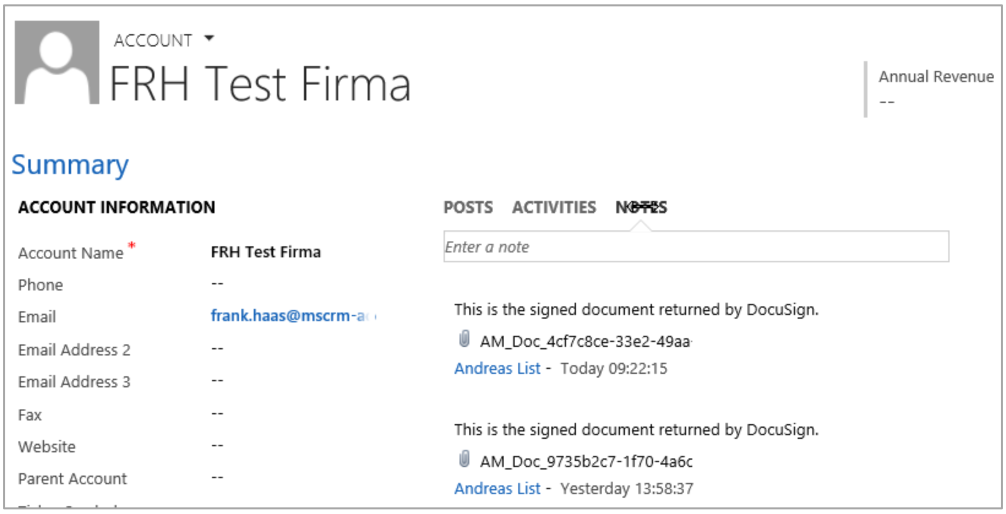


Figure 53: Completed documents

DOCUSIGN ONLY REFRESHES THE STATE OF AN ENVELOPE ABOUT EVERY 15 MINUTES! THIS ONLY IF YOU ARE ACTIVELY CHANGING SOMETHING IN DOCUSIGN.
Exception: If you have installed the additional DocumentsCorePackServerSign.zip, DocuSign will automatically update the corresponding CRM records whenever a signing process has been finished.

You can also have a look at all the envelopes you have already sent to an entity (in our example the chosen entity is an account):

Open your preferred entity and then change to *Docusign Transactions*.

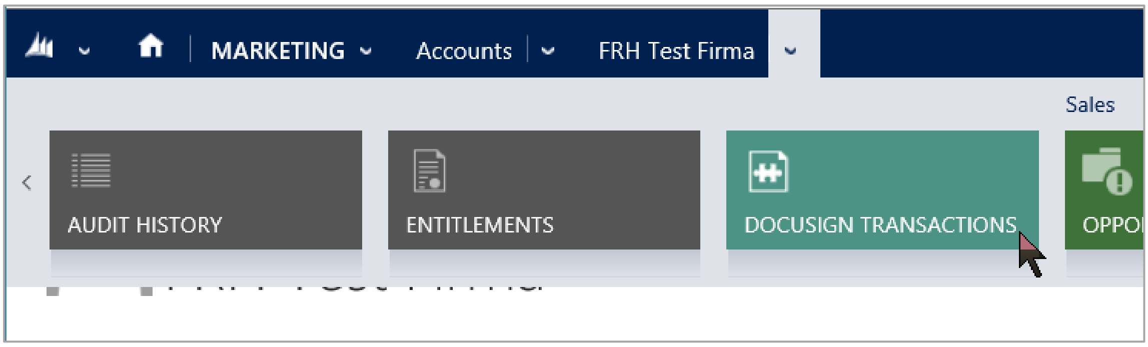


Figure 54: DocuSign transactions

Here you can see all your completed DocuSign transactions.

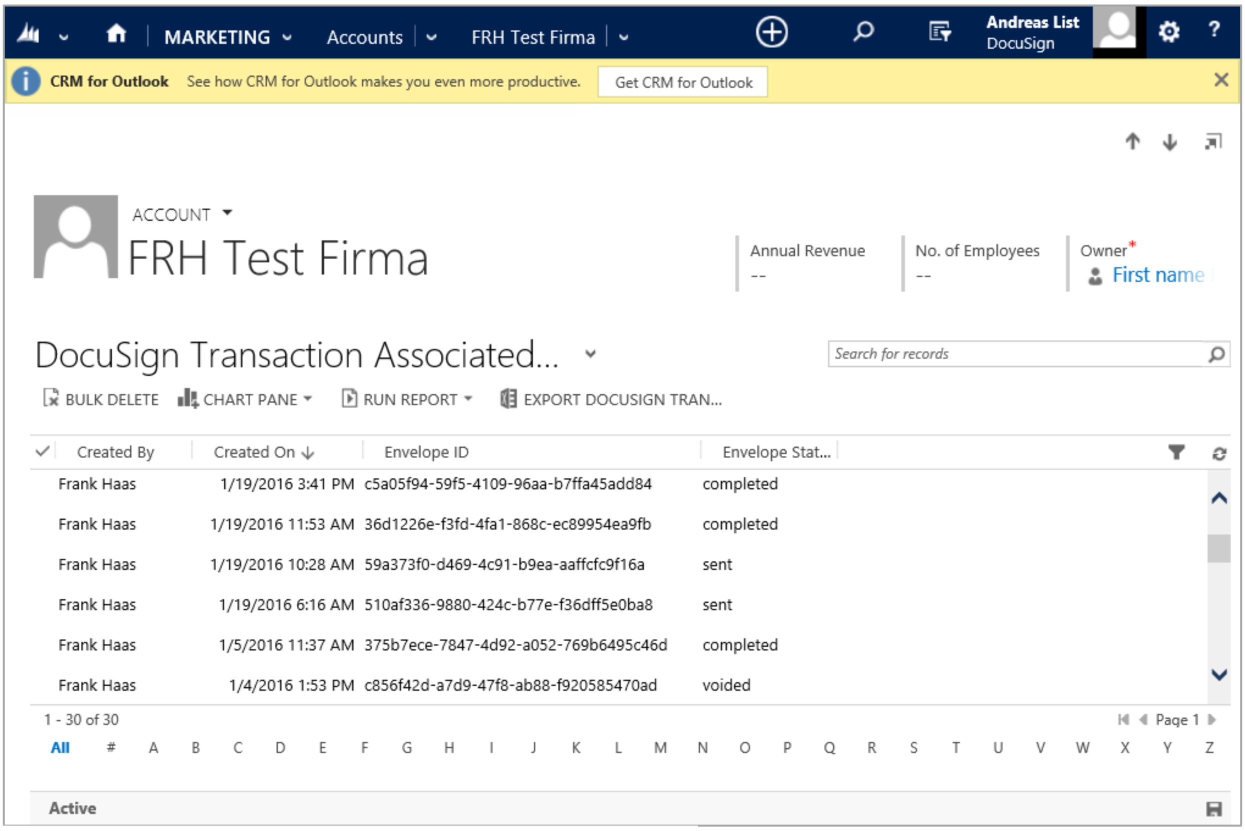


Figure 55: Completed DocuSign transactions

5.3 How to create a document and sign it with DocuSign in a Workflow?

Open your Microsoft Dynamics 365, navigate to Settings and select Processes. You are now on the surface below. Here you can generate a new process by clicking the **[*New*]**-button, highlighted in yellow.

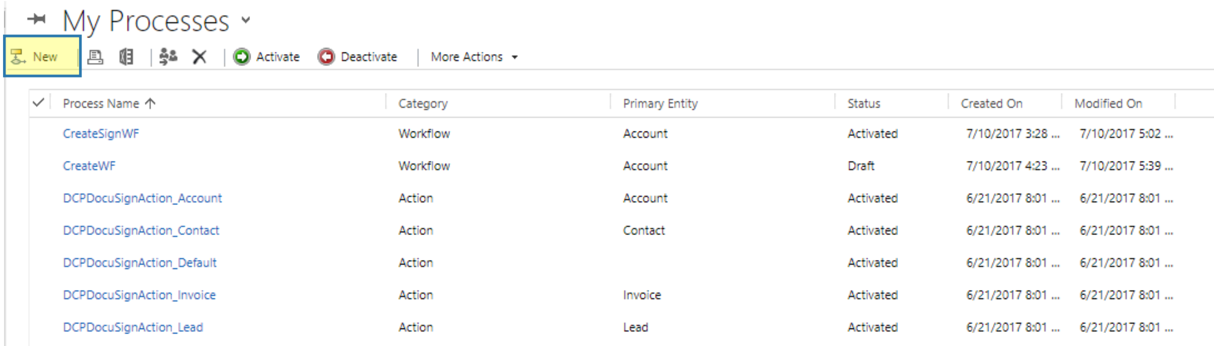


Figure 56: Add new Process

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

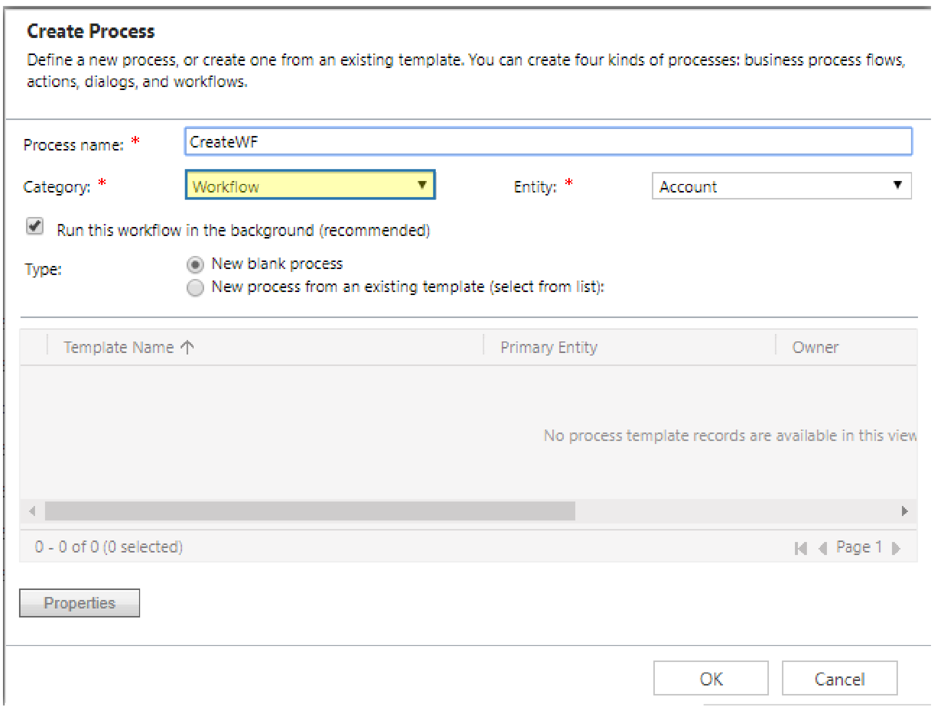


Figure 57: Create Process

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

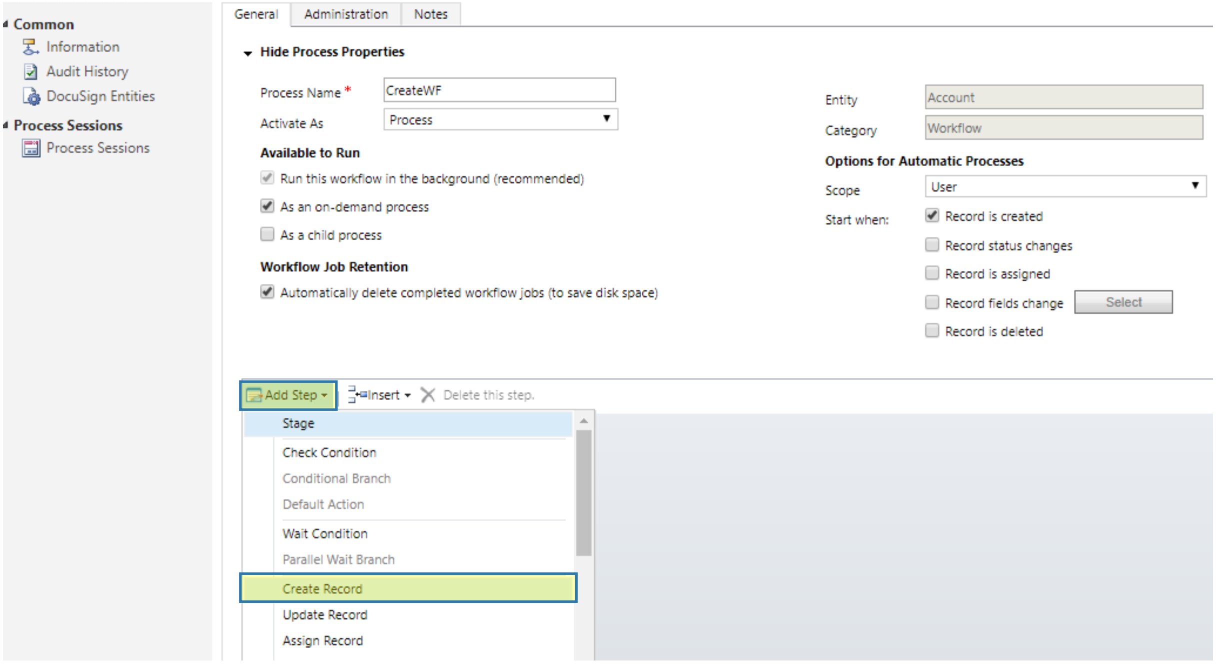


Figure 58: Add Step

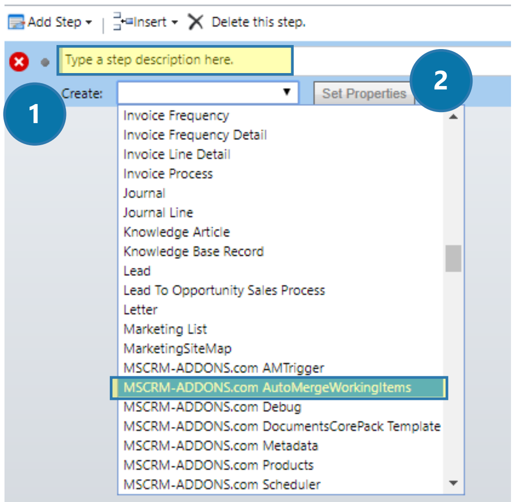


Figure 59: AutoMergeWorkingItems

❶ 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 field highlighted in yellow.

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

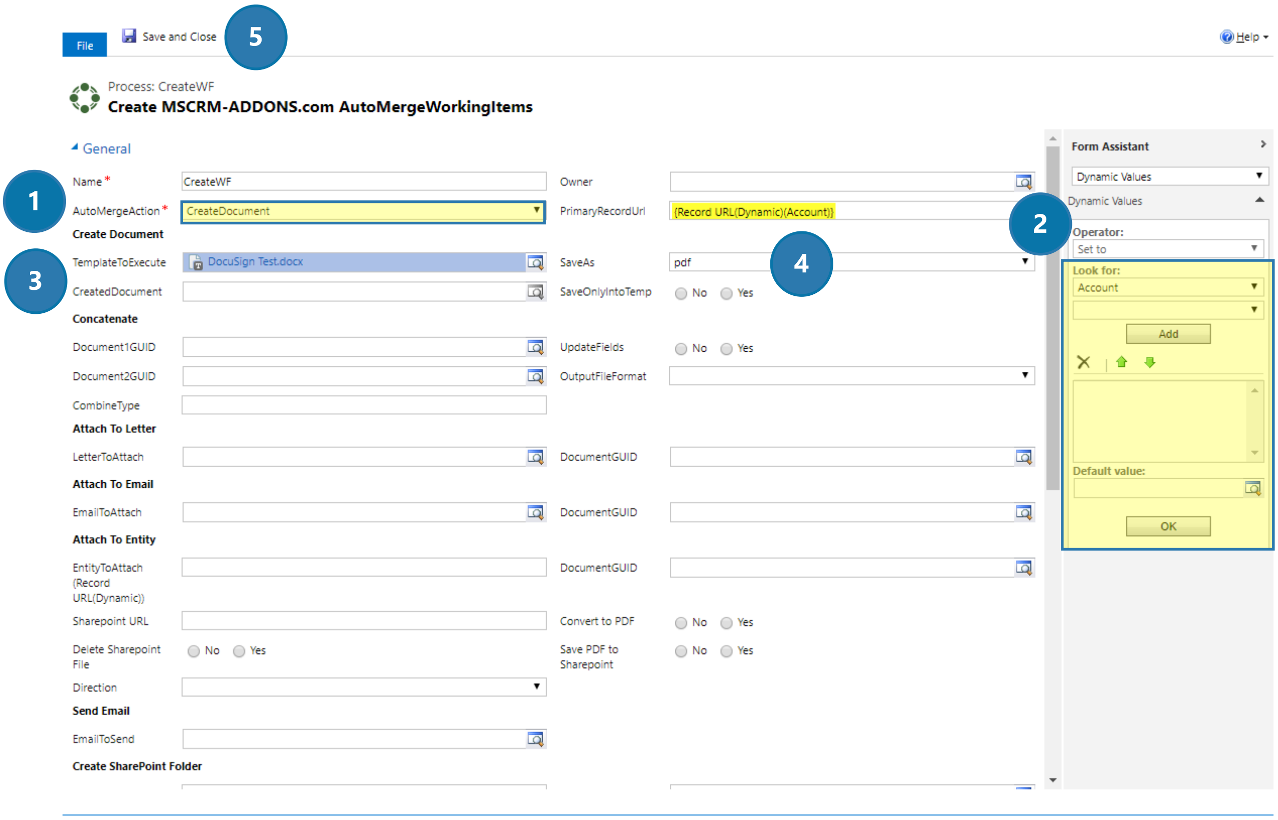


Figure 60: Set Properties AutoMergeWorkingItems

❶ Type in the name of your step and select an AutoMergeAction, in this case CreateDocument (highlighted in yellow).

❷ Next, you will have to define the PrimaryRecordUrl. To do so, you will first have to click into the field, which will be unfilled at first. Go to the right side and choose the Entity you defined before – in this case 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. Finally click the ***[OK]***-button and your PrimaryRecordUrl will be automatically filled with the right URL, marked in yellow.

You will first have to click into the PrimaryRecordUrl field in order to select Record Url(Dynamic). Otherwise, the drop-down menu cannot be opened.

❸ Select the template you want to execute.

❹ And choose the format you want to save as – in this case pdf.

❺ The last step is to Save and Close this window.

After customizing your first step, you can add another step by clicking the ***[Add Step]***-button again. Now you will have to select Wait Condition in order to wait until your document is created.

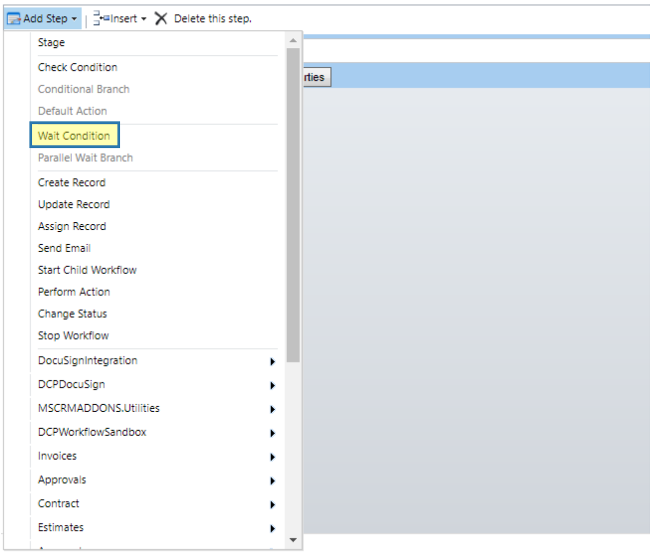


Figure 61: Wait Condition

Next type in the description of your Wait Condition and click <condition>(click to configure), highlighted in yellow below.

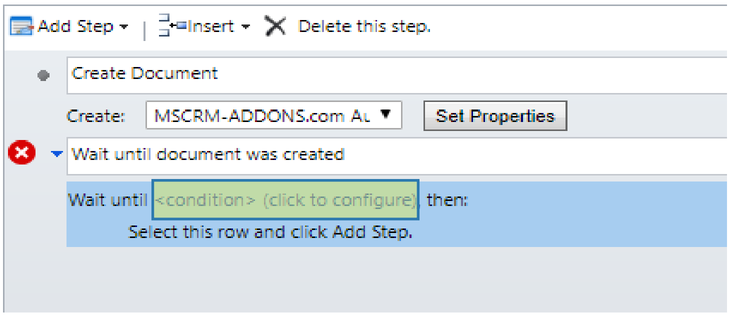


Figure 62: Configure Wait Condition 1

Here you can define how your Wait Condition should react. Therefore, select the step, you created before (Create Document) and then specify the Conditions. In this case, the Wait Condition will wait until the Status of your Create Document (MSCRM-ADDONS.com AutoMergeWorkingItem) equals Inactive.

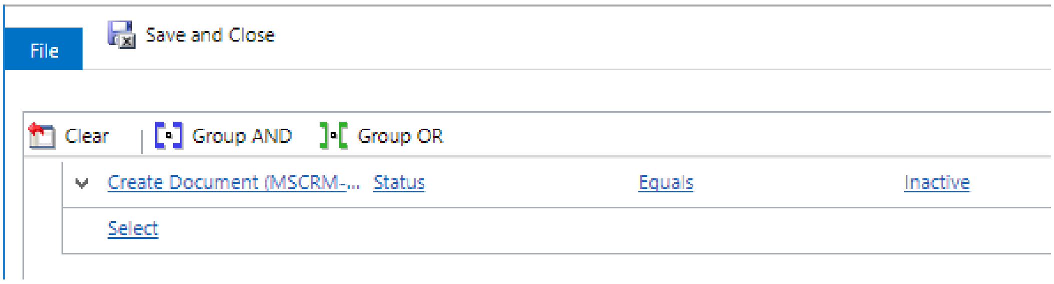


Figure 63: Configure Wait Condition 2

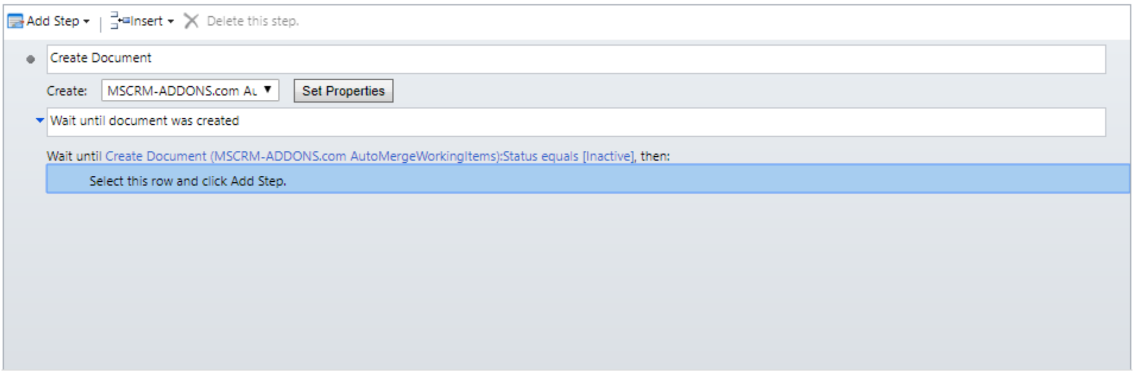


Figure 64: Configure Condition

Next follow the instructions above, highlighted in blue. Click the ***[Add-Step]***-button and select Create Record. Then open the drop-down menu and select MSCRM-ADDONS.com AutoMergeWorkingItems like before (see page 39) and click the ***[Set Properties]***-button.

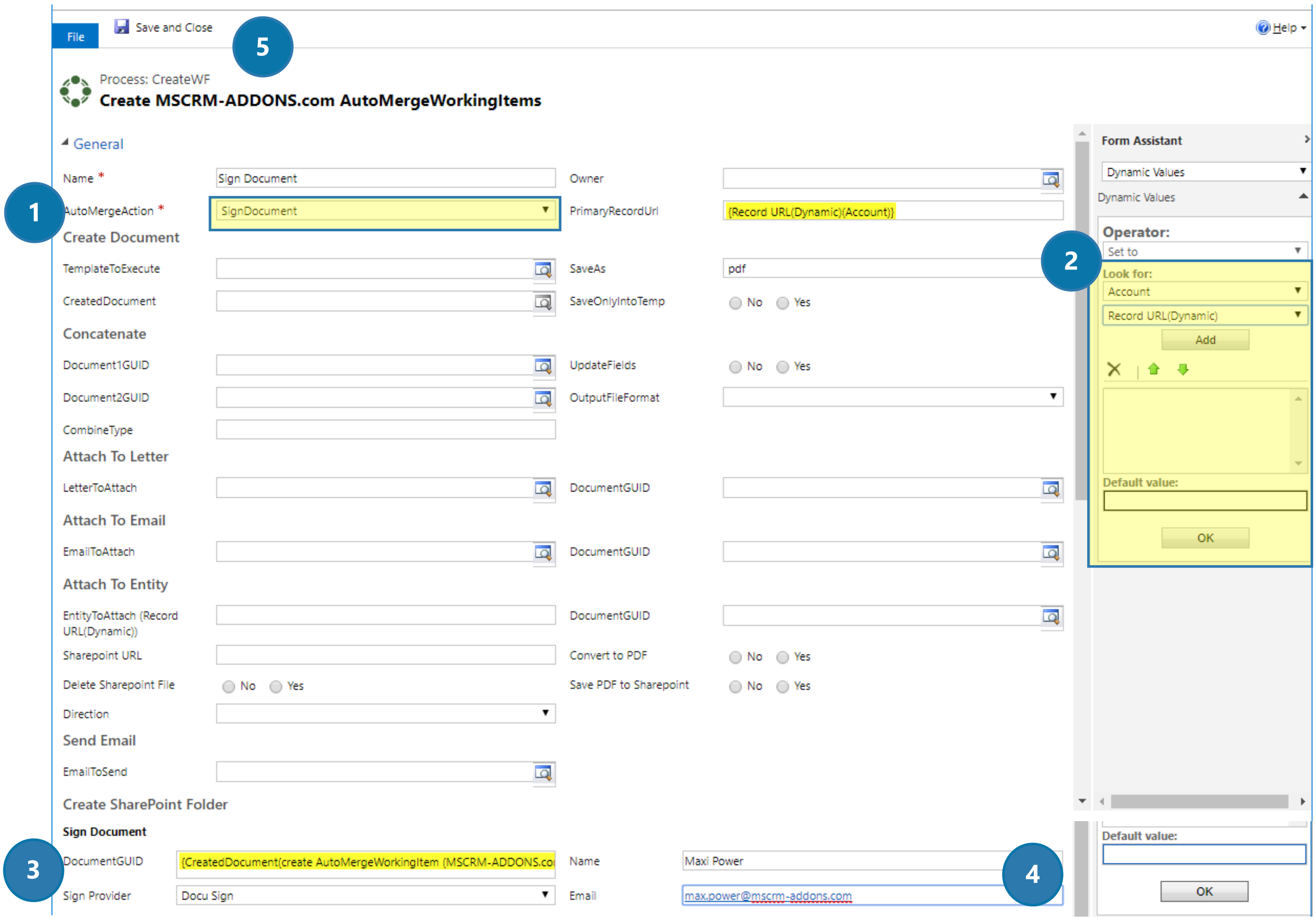


Figure 65: Set Properties

❶ Type in the name of your step and select an AutoMergeAction, in this case SignDocument (highlighted in yellow).

❷ Next, you will have to define the PrimaryRecordUrl. To do so, you will first have to click into the field, which will be unfilled at first. Go to 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.

❸ Scroll down to the Sign document area and do the same as in step 2 to add the DocumentGUID. Select DocuSign as Sign Provider.

❹ Then type in the Name and Email of the recipient.

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.

❺ This step starts the main signing workflow. Save and Close this window.

Before defining the next step, you need a Wait Condition, which waits until your document is signed. Therefore, select your second step, highlighted below. This Wait Condition focuses on the Sign step.

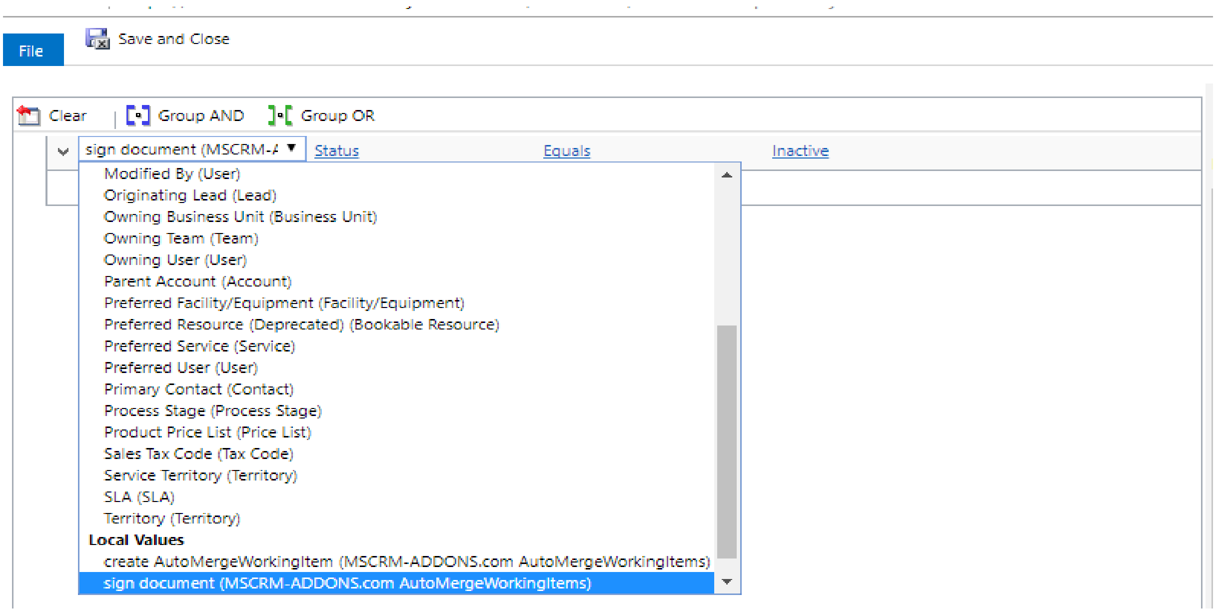


Figure 66: Configure Wait Condition

Next, select the row below the Wait step and click the ***[Add Step]***-button. For this step choose DCPWorkflowSandbox and then TriggerSubWorkflow highlighted below. This function enables the deployment of this Workflow.

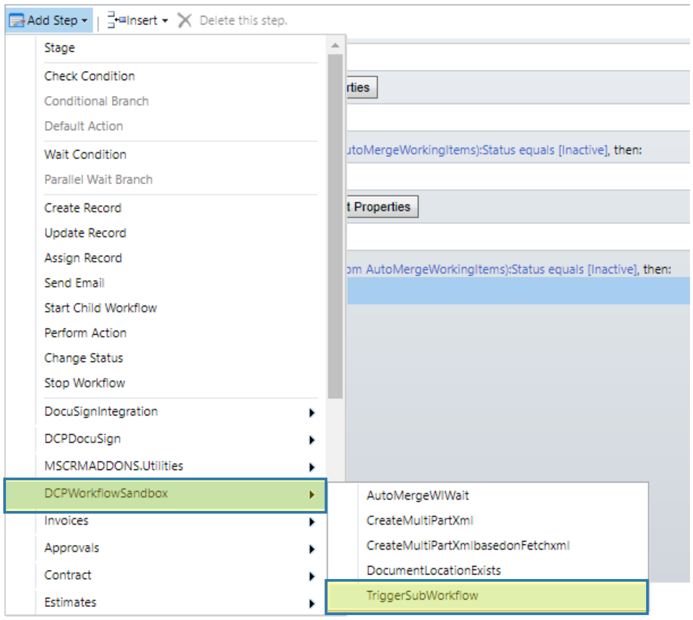


Figure 67: DCPWorkflowSandbox Step

Then click the ***[Set Properties]***-button to customize your step.

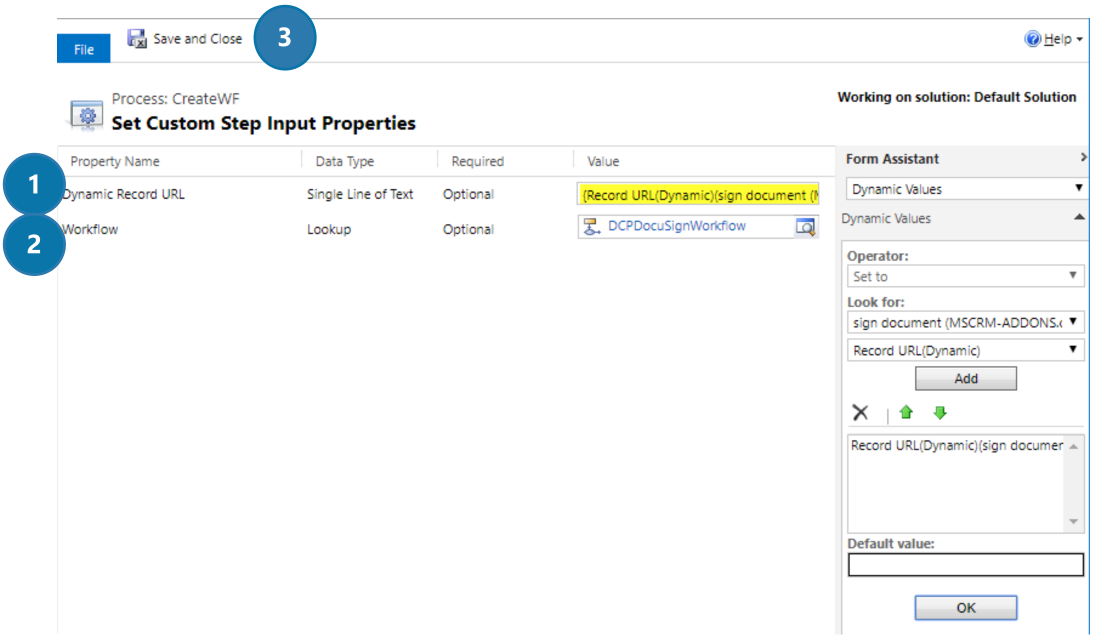


Figure 68: Set Properties

❶ Click into the Dynamic Record Url field and go to the right side and open the drop-down menu below Look for. Select sign document (MSCRM-ADDONS.com AutoMergeWorkingItem) and then choose Record URL(Dynamic) below. Click the [Add]-button and then the [OK]-button to add the URL to your field.

❷ Select DCPDocuSignWorkflow as Workflow and click on the ***[Save and Close]***-button ❸ in order to proceed.

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

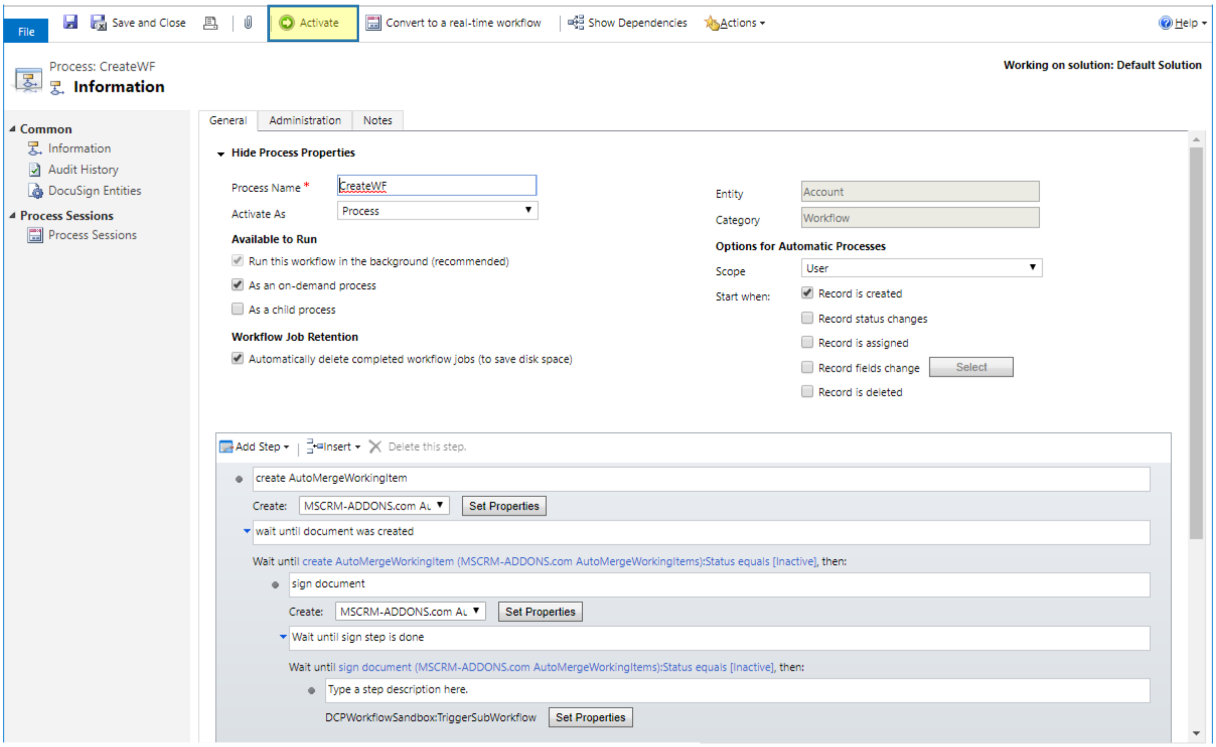


Figure 69: Activate Workflow

5.4 How to get the values back from DocuSign?

If you use our latest version of DocumentsCorePackDocuSign, you will find a new function named GetFieldValue. This new function allows you to get all values added by the person who signed the document.

DocuSign has its own option to get values back and write them to Dynamics365. DocuSign refers to this capability as "Merge Field Write-back". We do recommend using the out of the box capability of DocuSign whenever it is possible. Here is a link to a video describing this capability in detail. https://www.youtube.com/watch?v=BbRgUB1yqDE&feature=youtu.be

This function can be used for example in a workflow triggered when DocuSign uploads the signed document to Dynamics 365 (DocuSign transaction) or others.

To use this step, please click on the ***[Add Step]***-button, navigate to *DCPDocuSign* and select *GetFieldValue*, like you can see highlighted in yellow in the figure below.

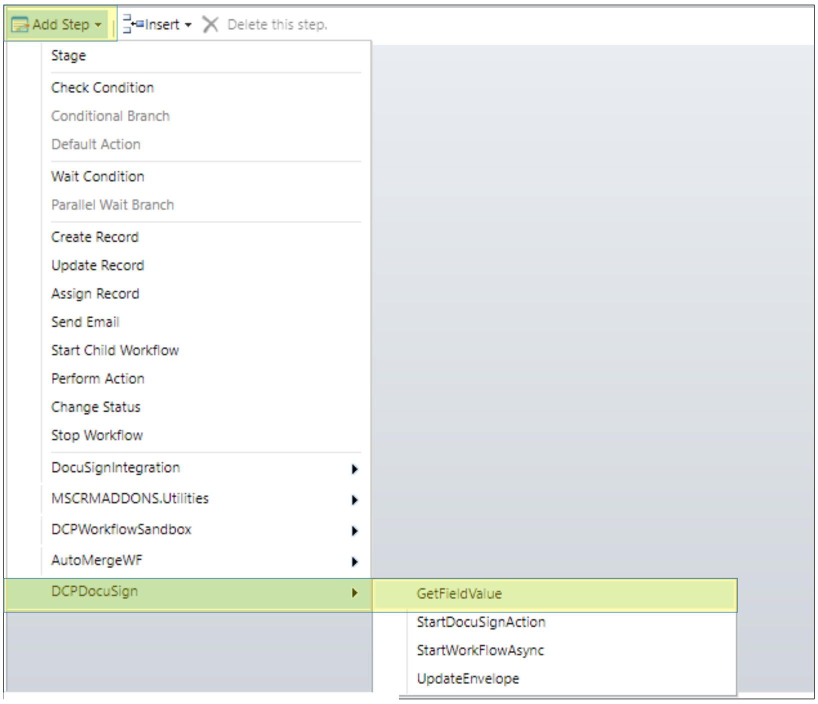


Figure 70: GetFieldValue

Then click the ***[Set Properties]***-button to customize the GetFieldValue step.

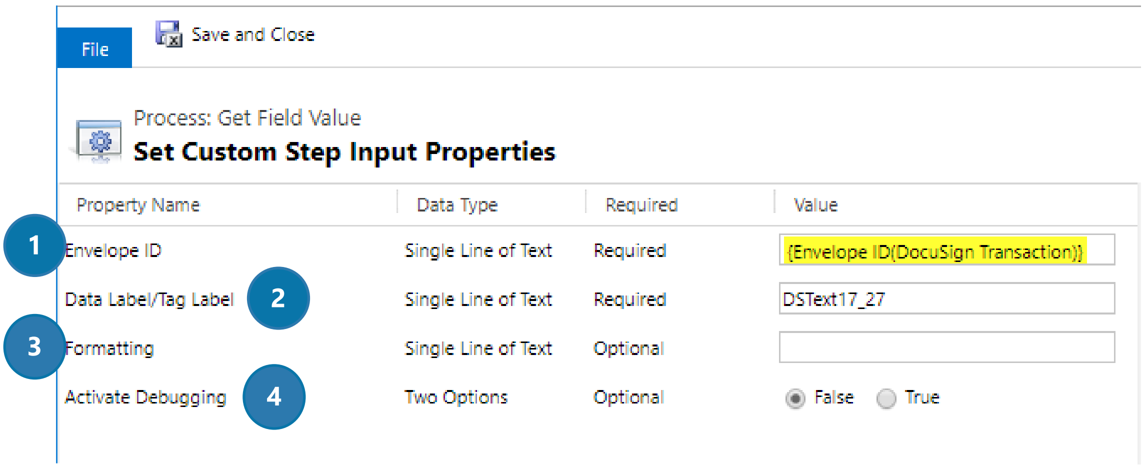


Figure 71: Set Custom Step Properties for GetFieldValue

❶ Envelope ID

This field is, like the name says for the envelope id.

For example: 4e8ee1db-04a0-4d5b-94b7-04c24e466f36

❷ Data Label/Tag Label

This is the name of the related field.

For example: DSText17_27

In order to get unique Data Labels for DocuSign DocumentsCorePack generates unique Data Labels for the DocuSign fields during the creation process in a specific way. Because of that it is hard to get the Data Label out of the template. A way to get all the Data Labels is by viewing the envelope on the DocuSign website. If you finalized a template the related Data Label for the DocuSign fields will stay the same until you change it. When you move a DocuSign field or add new DocuSign fields the Data Label might change and you might need to adjust your workflow to get the correct value.

The easiest way to get the correct Data Labels is by following the steps below:

1. Create a document by using the created template and send it via DocuSign
2. Login on DocuSign with your credentials
3. Go to *Manage* → *Send*
4. Open the envelope where you need the data labels
5. If the envelope is already signed, then click on *More* → *Create Copy*
6. Otherwise you could also select *Correct*
7. Select *Next* to go to the designer
8. Now you can see all the created fields and if you click on one you will find the corresponding data label on the right side of the designer under *Data Label*, like you can see below

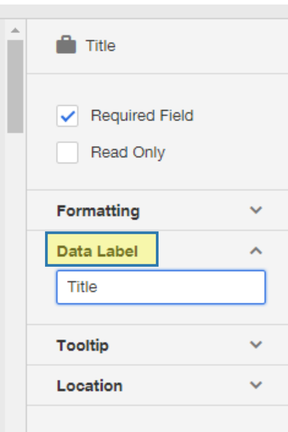


Figure 72: Data Label

❸ Formatting

If the values are written in different formats, it is possible to change the Locale ID Values here. Please find all Locale ID Values here. The default value is English-US (1033).

For example: For English Canada use 9225

❹ Activate Debugging

For debugging purpose, you can check the *True* checkbox.

After adding the step and configured it, you can next use the output parameters to do some check conditions in your workflow or to save the data to your Dynamics 365.

A list of the available output parameters of the GetFieldValue step you can see when you select the created step in the Form Assistant. This list is prefiltered for the selected field/parameter. E.g. if you click into the Credit Limit field you will get only the number output parameters of the GetFieldValue step. A full list of all output parameters you will see when you click into a text field e.g. description.

Value as Boolean

Returns true if the data is true or X. The checked checkbox returns X as data.

Value as DateTime

Returns a date and time. The default and minimal value of the parameter is the date 1753-01-01. All dates below will be set to the minimal value. Please use the Value is DateTime parameter to check if the data is really a DateTime, otherwise you might lose data.

Value as Decimal

Returns the data as decimal. Default is 0.

Value as Double

Returns the data as double. Default is 0.

Value as Integer

Returns the data as integer. Default is 0.

Value as Money

Returns the data as money. Default is 0.

Value as Text

Returns the value as plain text as it was typed in.

Value exists

Returns true if the field exists.

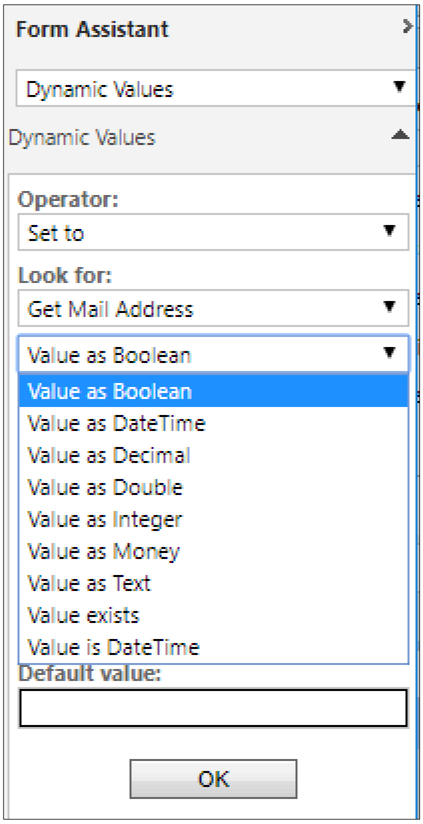


Figure 73: Output parameters for the GetFieldValue

After customizing the Properties, your Workflow could look like in the figure below.

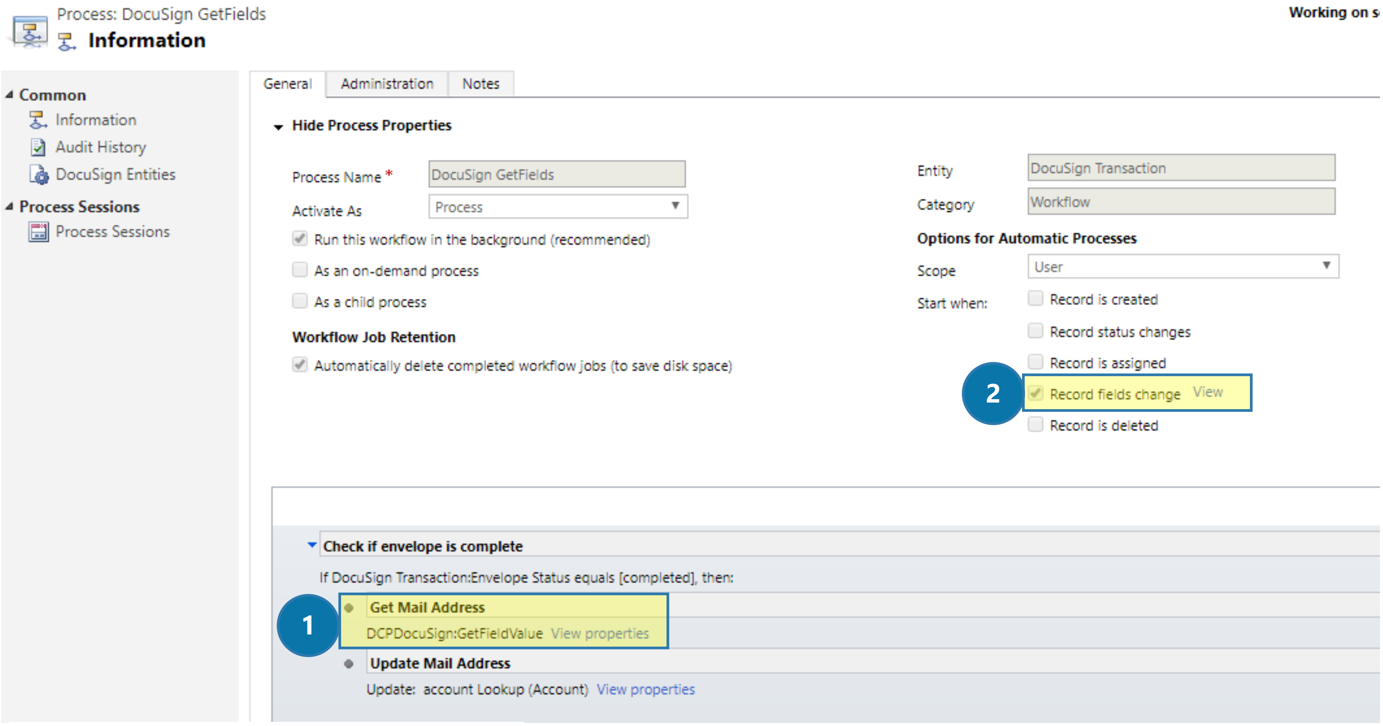


Figure 74: DocuSign GetFieldValue example

First, we check if the Envelope Status is complete, because then the document is signed, and we can collect the data of the fields.

Then we added the 1 *GetFieldValue* step, which we created before (highlighted in yellow). After this step we added an Update Record step to update the related Dynamics 365 field.

We set as a start trigger the 2 Record fields change option referring to the DocuSign Transaction – Envelope Status field.

This means each time when DocuSign updated the DocuSign transaction e.g. when a document is signed, this workflow will start and pick up the inserted data of the Signer and save it to Dynamics 365.

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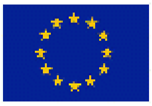
7 Contact

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.



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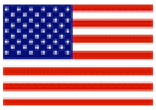

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