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DocuSign integration in DocumentsCorePack For Microsoft Dynamics 365

July 2023

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Preamble

This documentation is intended to guide you through the options provided by DocumentsCorePack to support the usage of e-Signatures via DocuSign in Microsoft Dynamics 365.

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:

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

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 ability to use e-Signatures for processing documents. It integrates with different e-sign providers, such as DocuSign. The tool empowers users to generate and electronically sign documents.

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1. DocuSign: an additional feature of DocumentsCorePack

DocuSign is an additional feature offered by DocumentsCorePack. It is a tool that empowers you to electronically sign documents and manage e-Signatures in Microsoft Dynamics 365.

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

If you want to use the DocuSign integration of DocumentsCorePack, please follow the steps in this documentation.

- **Create a DocuSign Business Flex/Advanced Solutions Account**
- **Install DocuSign Dynamics (At least version 5.2 or higher)**
- **Set up DocuSign to work correctly in Dynamics 365**
- **Install the additional DocumentsCorePackServerDocuSign.zip**
  - Please check if you have version 6.2 or above. If not, we recommend updating your version as the older versions will stop working by the end of September 2023.

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 process of installing DocuSign is straightforward. Initially, any Microsoft Dynamics 365 user who wishes to utilize DocuSign as an added feature in DocumentsCorePack must be designated as an active user in DocuSign. Once that is set, the "Send on behalf of" rights need to be included in the primary DocuSign account.

The “Send on behalf of rights” must then also be added to the master DocuSign account.

Optionally, you may want the corresponding Dynamics 365 records related to DocuSign to be automatically updated whenever a signing process has been finished. To guarantee this behavior, the DocumentsCorePackServerDocuSign.zip must be installed.

After having set these steps, you can start to create DocumentsCorePack templates including DocuSign fields.

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1.1.1. How to add a user to a DocuSign account

To add a user to DocuSign, you need a DocuSign account. Please register for DocuSign here if you do not have an account yet.

Once you have created a DocuSign account, log into it, navigate to ❶ **Settings** and select ❷ **Users**.

To add a new user simply press on the ❸ **ADD USER** button and enter the new user.

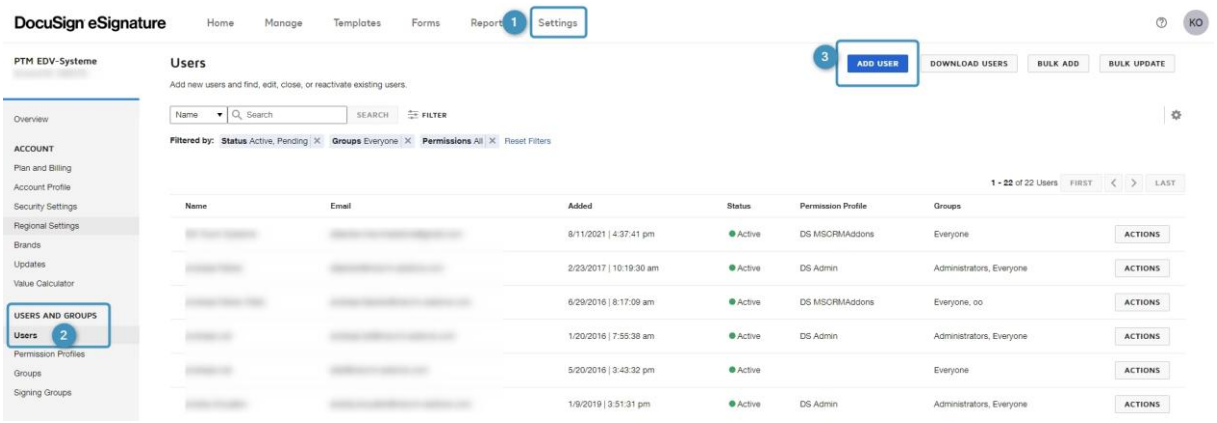


Figure 1: DocuSign - Settings - Users - Add User

You can see that the status of the new user is pending.



Figure 2: Status of a new added user - pending

Meanwhile, the user will be sent an email containing instructions on how to activate their account and set a password.

If you wish to access the currently logged-in DocuSign user in Microsoft Dynamics 365 by clicking the DocuSign Users button, you will not find any associated record because DocuSign examines the initial DocuSign action to determine if there is a matching DocuSign account in Microsoft Dynamics 365. If there isn't, it remains hidden.

To ensure the user's visibility in Microsoft Dynamics 365, they should open a random contact or account in Microsoft Dynamics 365 and then click on the **Go To DocuSign** field.

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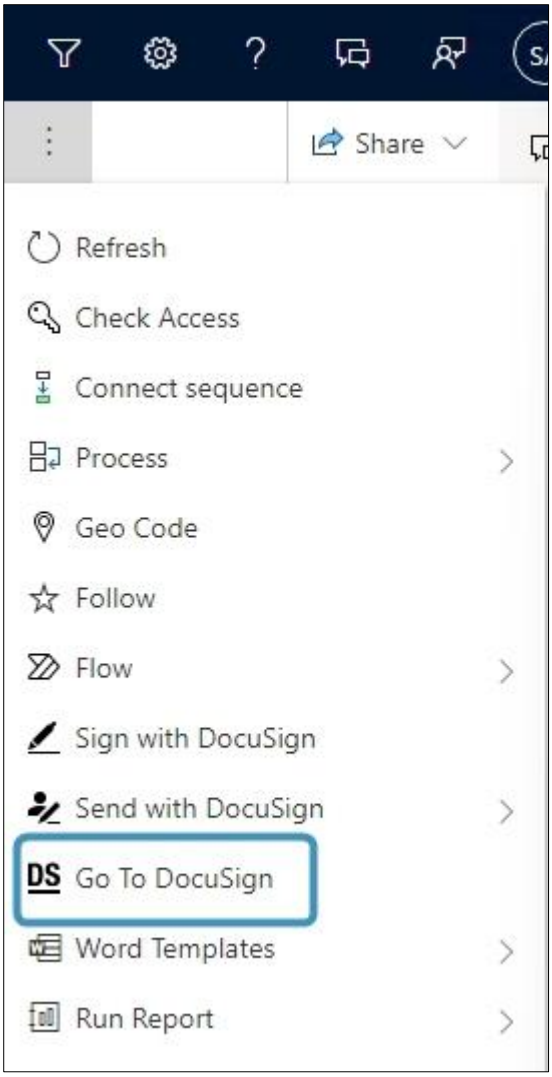


Figure 3: Open random Account, hit the three dots and select Go to DocuSign

If the user is recognized by DocuSign, the screen below will be displayed.

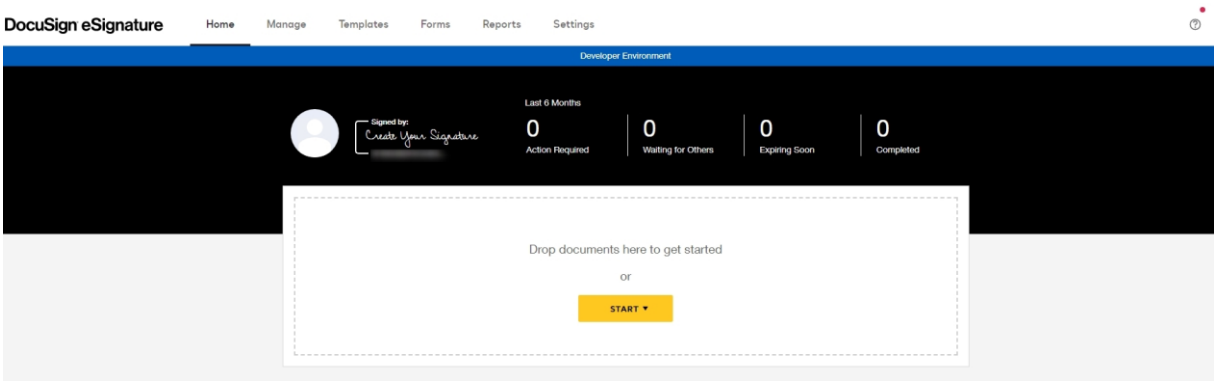


Figure 4: DocuSign Welcome screen

And the DocuSign User record is validated.

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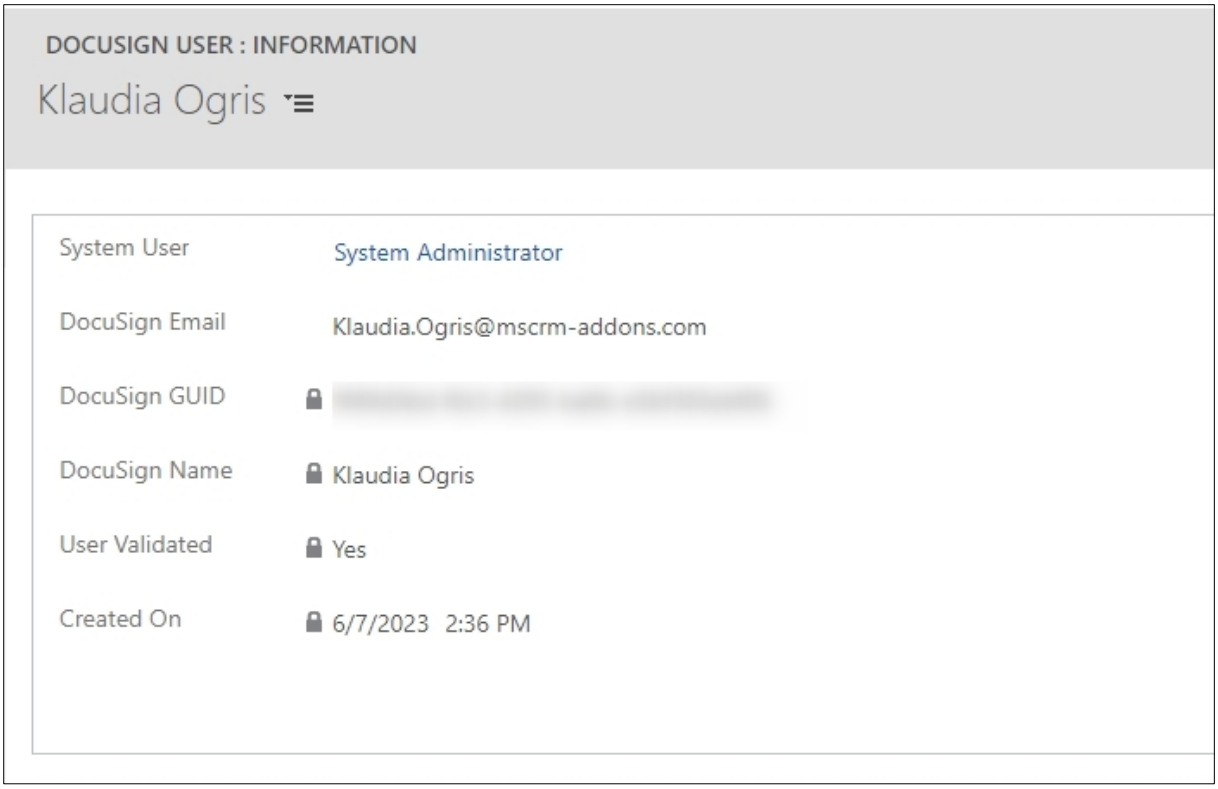


Figure 5: Validated DocuSign user information

1.1.2 How to activate DocuSignV2

DocumentsCorePack has implemented the oAuth authentication for DocuSign, as it will be a requirement from September 2023.

The new implementation can be activated by adding the settings-key DocuSignV2 and then restarting your DocumentsCorePack service.

To do so, please navigate to Settings > MSCRM-ADDONS.com Products and select **AutoMerge**.

Next, click on the **Add New MSCRM-ADDONS.com Settingskey** button in the CommandBar.

In the so-opened window, insert the following data:

Name: **DocuSignV2**
IsCached: **Yes**
KeyValue: **true**

For more detailed information on how to create a settings-key manually, refer to this blog article.

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1.1.3 How to set the DCPDocuSignWorkflow (Deprecated for DocuSignV2)

Important: For customers already on DocuSignV2 (see chapter 1.1.2) this section is deprecated.

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

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

To activate this workflow, navigate to Settings > MSCRM-ADDONS.com Products and select **AutoMerge**.

Next, click on the **Add New MSCRM-ADDONS.com Settingskey** button in the CommandBar.

In the so-opened window, insert the following data:

Name: DocuSignWorkflow
IsCached: Yes
KeyValue: DCPDocuSignWorkflow

1.1.4 How to create Custom Actions (optional)

If you want to customize your email message or subject with data from Dynamics CRM, you can add a customization to the DCPDocuSignCreate_Default action.

The change will affect all DocuSign emails. To customize the email message only for a specific entity, you can create a copy of the DCPDocuSignCreate_Default action.

Step 1: Create a new process. To do so, navigate to Settings > Processes in Microsoft Dynamics 365. Then, click on the **New** button in the **My Processes** section.

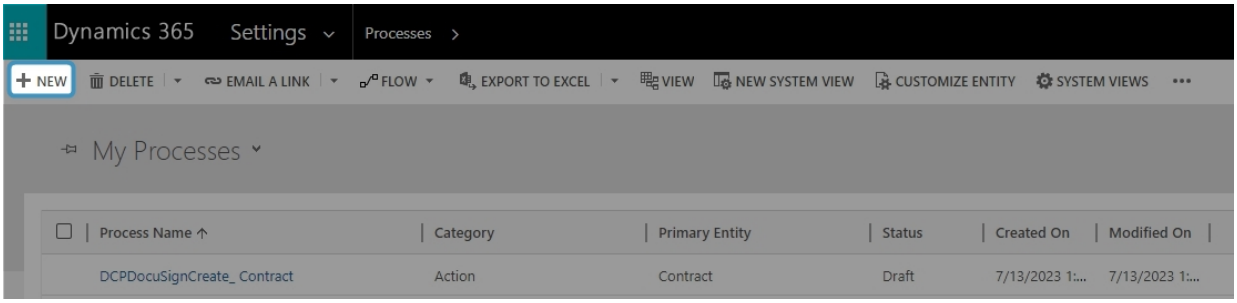


Figure 6: My Process section

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Create a new process in the newly opened window. As you can see below, you must enter a Process Name, Category and an Entity.

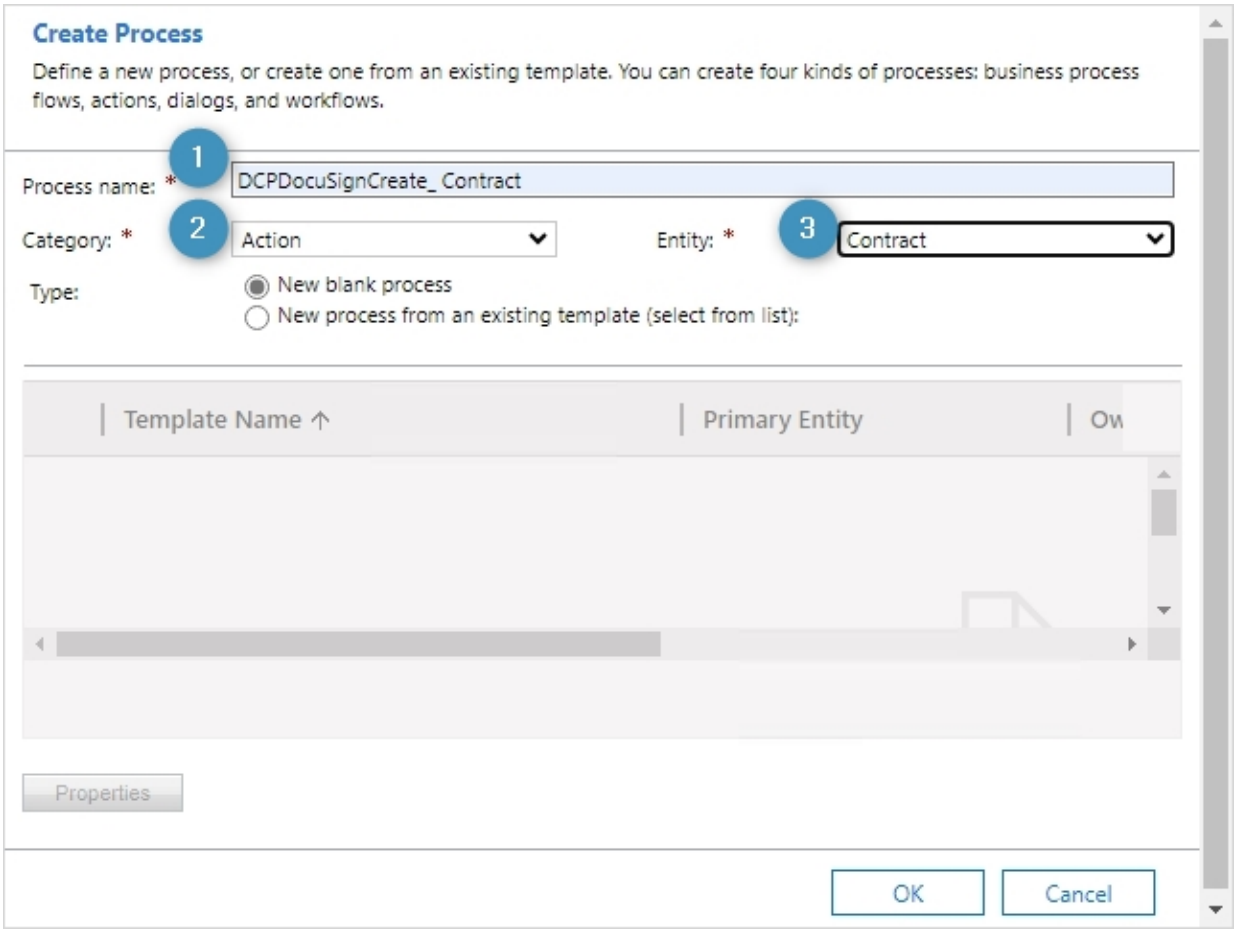


Figure 7: Create new process

Please note: Make sure that this pattern is followed when creating a new process:

1 **Process name**: The process name must start with **DCPDocuSignCreate_** 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 **DCPDocuSignCreate_Contract.**
2 **Category**: Select **Action.**
3 **Entity:** Select the corresponding entity (here: **Contract**).

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Step 2: Add a process argument. To do so, click on the green **Add** button **(+)** 1.

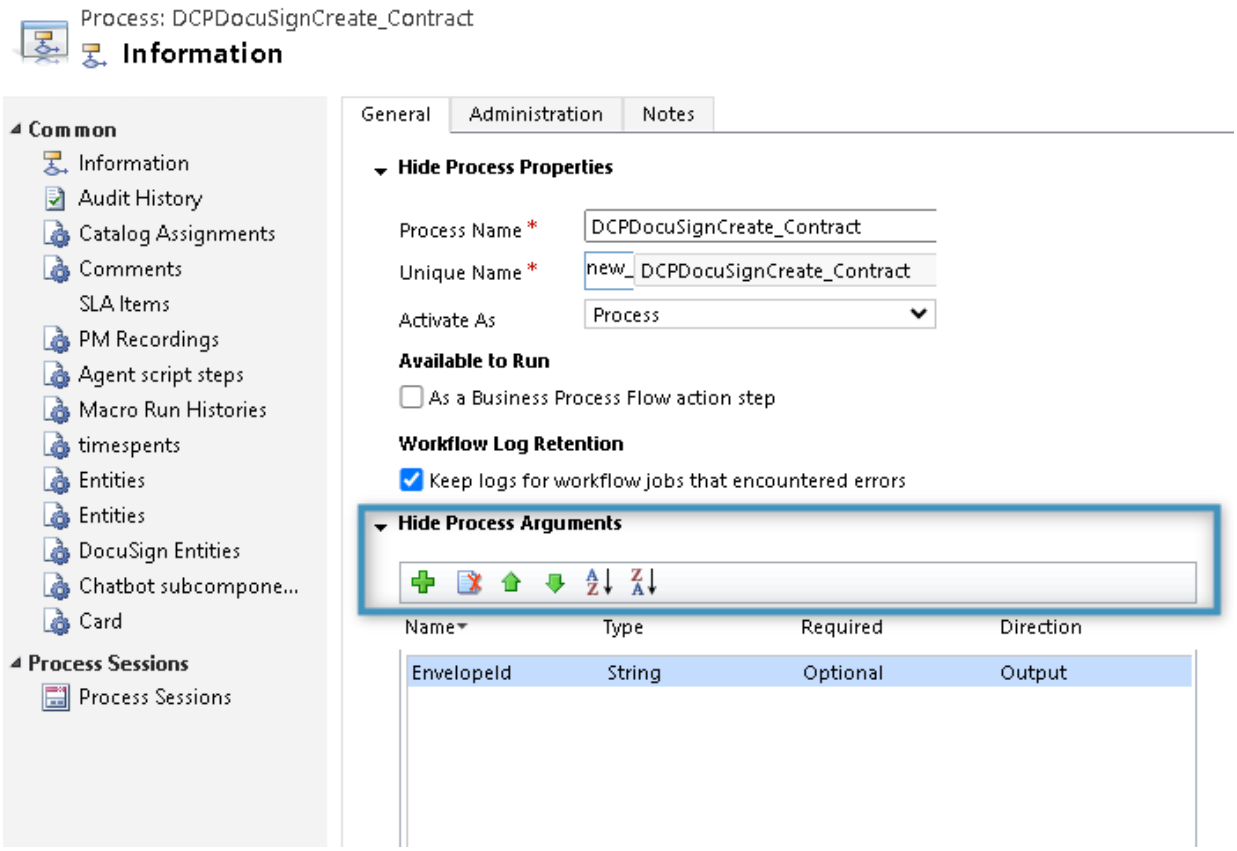


Figure 8: Add a process argument

Enter the following argument:

Name: **EnvelopeId**
Type: **String**
Required: **Optional**
Direction: **Output**

Please note: The process argument is added using **+**.

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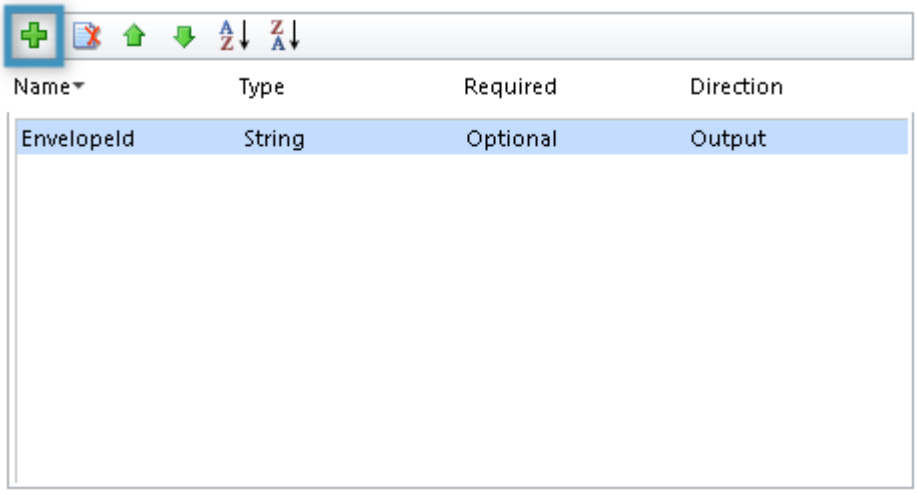


Figure 9: Process arguments

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

1. **DocuSignIntegration ValidateUserAccount**
2. **DocuSignIntegration Create Envelope**
3. **Assign Value**

If you haven't created a workflow in Microsoft Dynamics 365 Online before, have a look at this blog article.

First, add the **DocuSignIntegration ValidateUserAccount** step. It does not require further action.

Next, add the **DocuSignIntegration Create Envelope** step. It does not require further action.

Then add an **Assign Value** step. Select the **EnvelopeId** parameter in the name field and set the value to the **EnvelopeId** of the **CreateEnvelope** step.

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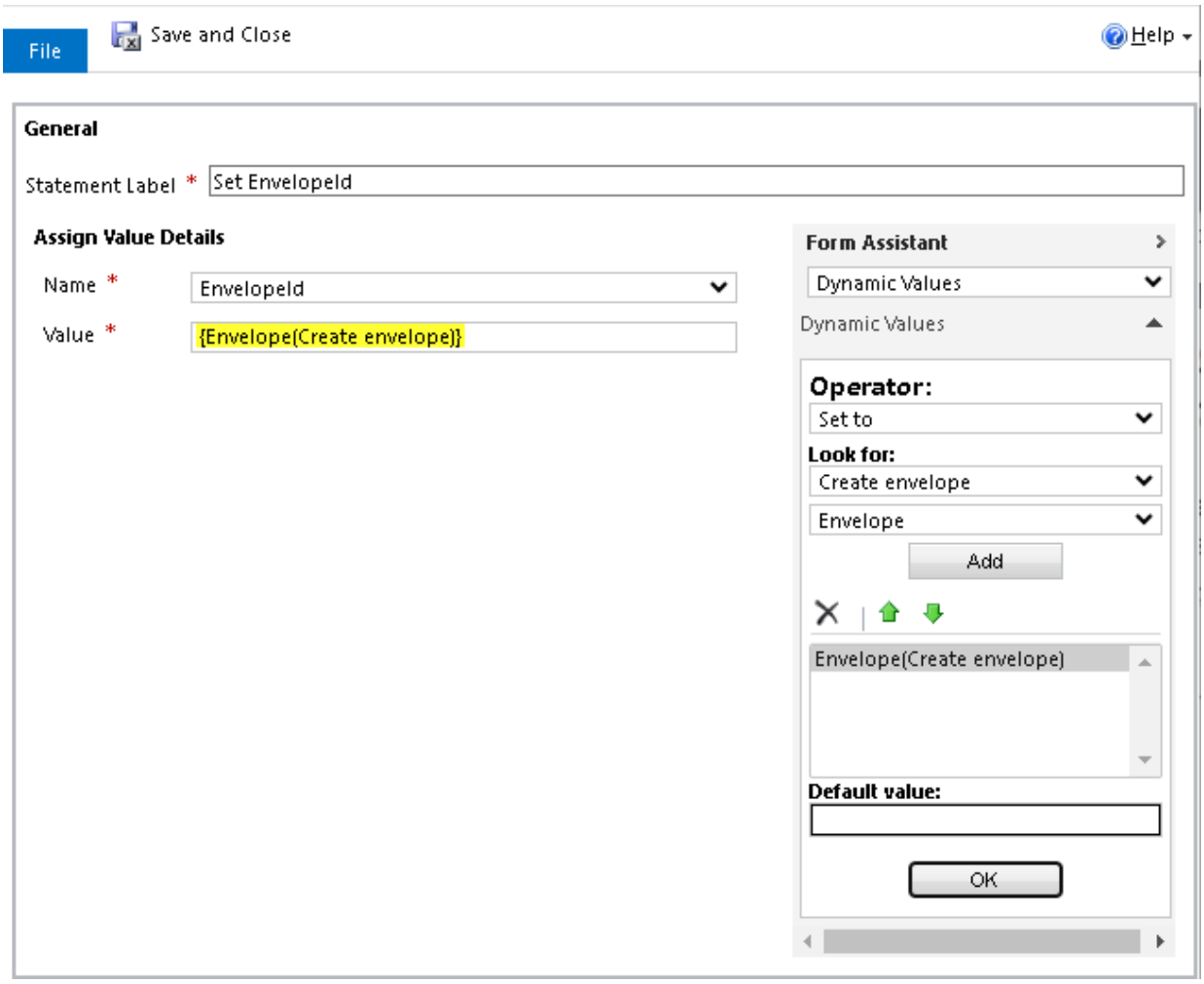


Figure 10: Assign Value step

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Step 4: Publish the created action. Once you have added all steps, please publish the custom action.

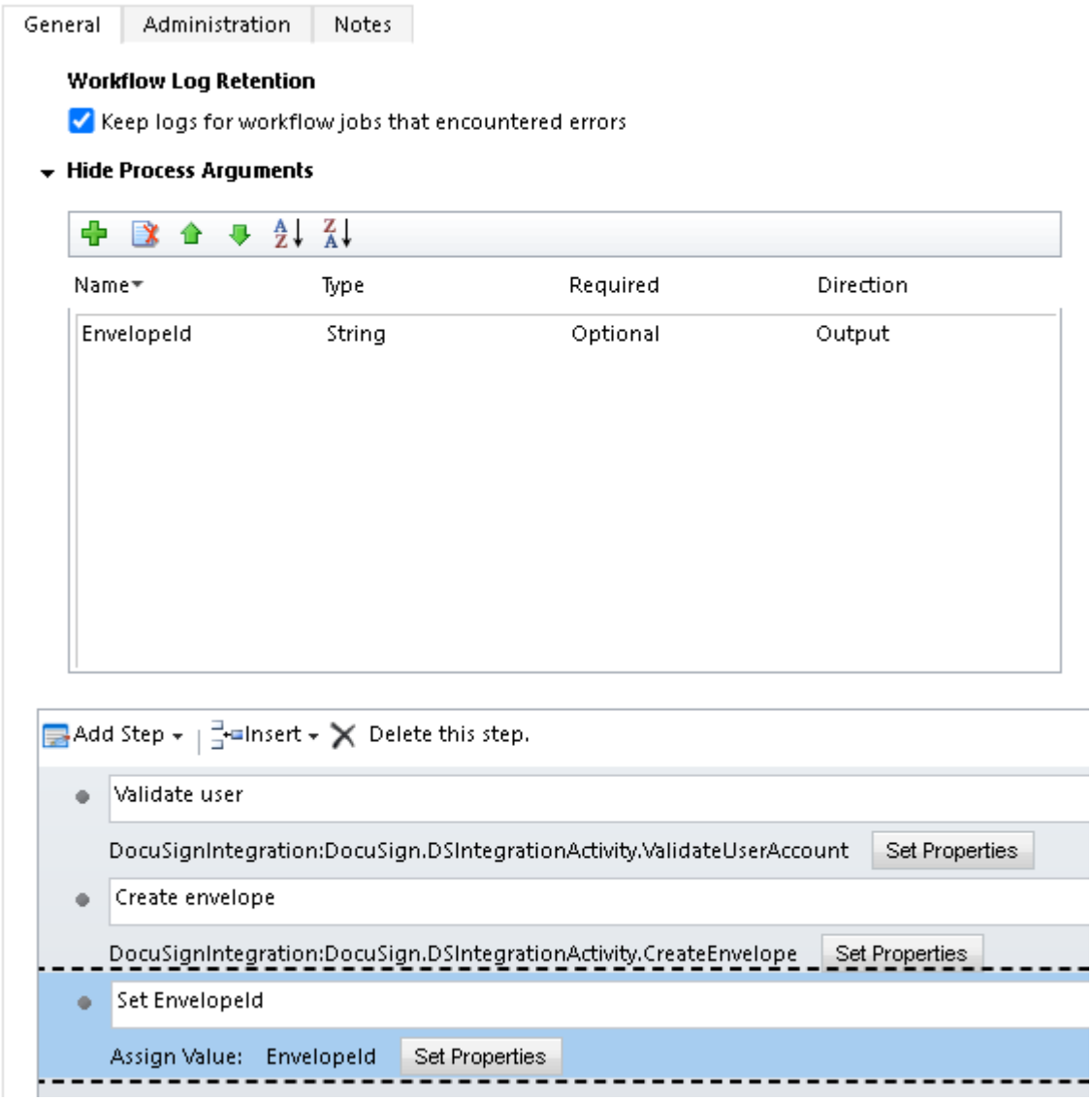


Figure 11: Process with arguments and steps

Please note: It is only important that the custom action exists. DocumentsCorePack automatically executes the custom action for the corresponding entity.

1.2. Consent

DocumentsCorePack requires the consent of users or admins to access DocuSign. If consent is necessary, DocumentsCorePack will inform the user and provide a link. The user must open the link and log in using their DocuSign user credentials to grant consent. Once consent is given, DocumentsCorePack can be utilized with DocuSign.

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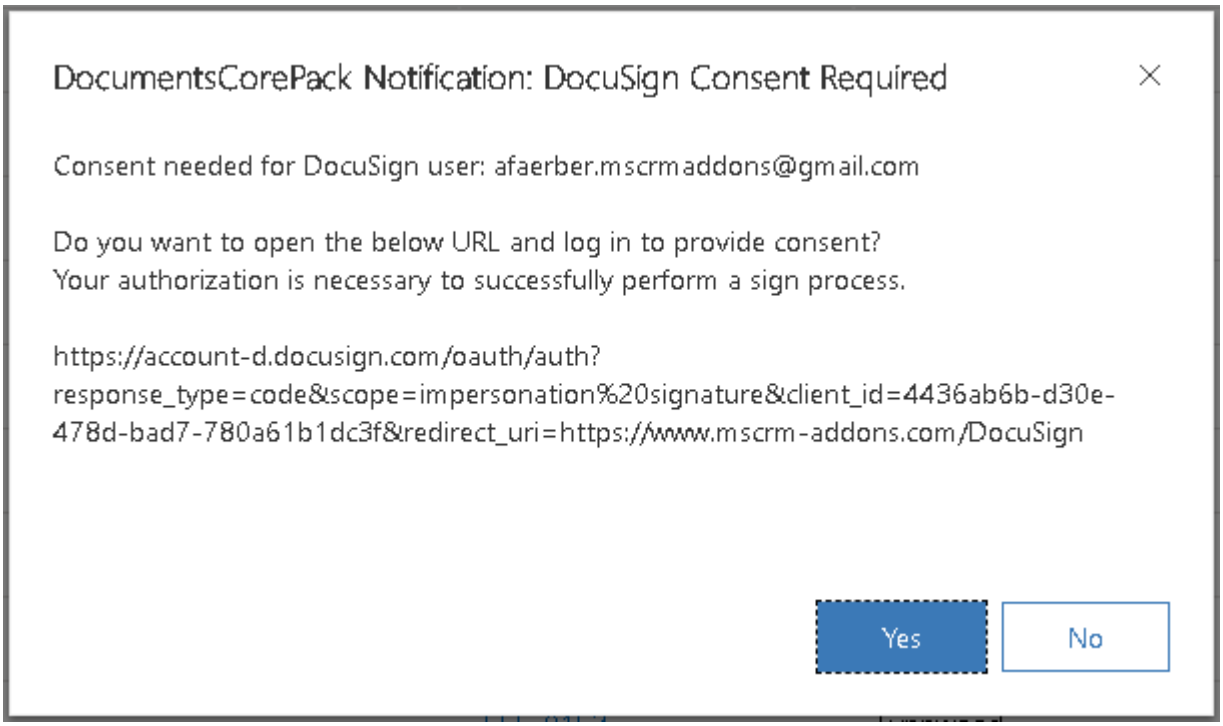


Figure 12: DocuSign consent required

The administrator of the DocuSign organization can provide consent for all DocuSign users. The initial step is to claim the domain on the DocuSign platform.

Next, open the appropriate link below and log in with the DocuSign organization admin credentials:

- For Production
- For Sandbox

All DocuSign users with the email address of the claimed domain will then have granted the DocumentsCorePack app to use DocuSign.

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2. DocumentsCorePack Templates for DocuSign

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

See this article for details.

2.1. How to create a DocumentsCorePack Template for DocuSign

In order to incorporate fields into Microsoft Word documents, you will need to utilize the TemplateDesigner feature of DocumentsCorePack. To access this functionality, navigate to the **Insert MailMerge Fields** option located in the **www.mscrm-addons.com** tab within your Word document. This will allow you to create your DocumentsCorePack template for DocuSign. For comprehensive instructions on utilizing the Template Designer, you can refer to the Template Designer User Guide available on our website.

Open the ❶ **Insert MailMerge Fields** button in the command bar of the ❷ **www.mscrm-addons.com** tab of your Word document. Position your cursor in the Word document at the place where you want the signature field to be.

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

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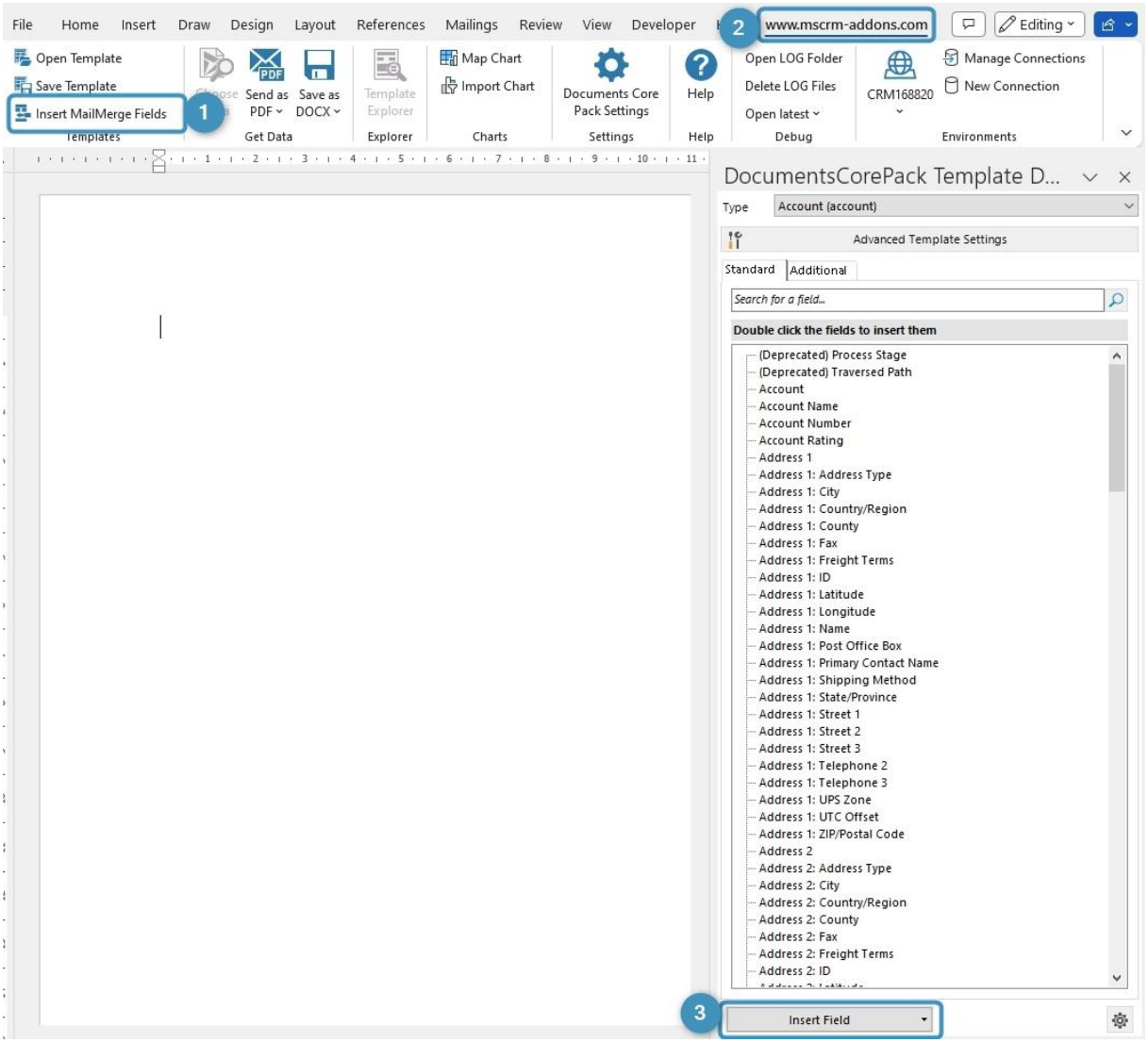


Figure 13: DocumentsCorePack Template Designer

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Select the **Insert DocuSign Item** and then **Signature**.

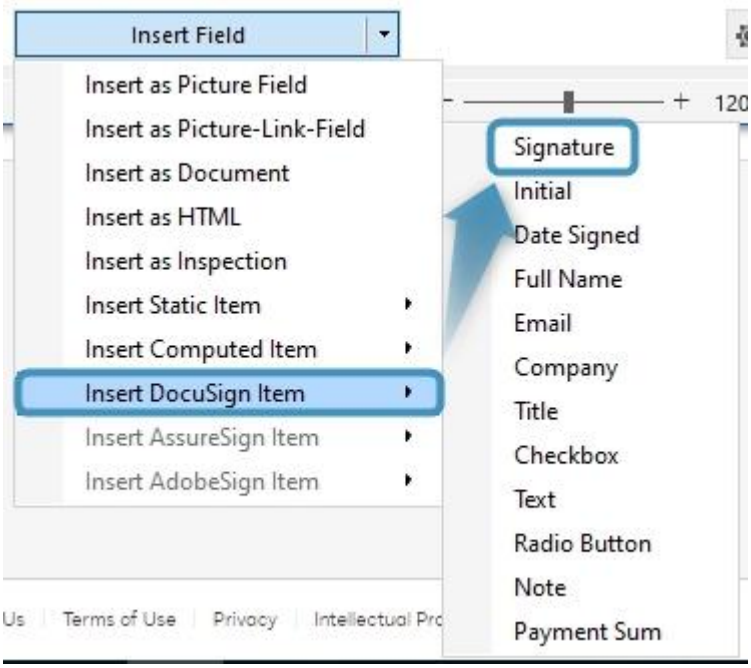


Figure 14: Insert DocuSign Item and Signature

2.2. DocuSign Items

As illustrated in Figure 14, there are multiple DocuSign Items available for selection. These items are briefly described below. On the left side, you will find the placeholder fields, while on the right side, you will see the result once you have reviewed and signed your document.

2.2.1 The Signature field

With a click on the Signature Item, a placeholder field for the signature will be inserted into the Word document.

DS stands for DocuSign
Signature stands for the type of DocuSign field
1 stands for the next number (this number is needed to make every DocuSign field unique)

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Figure 15: the Signature field

2.2.2 The Initial field

With a click on the Initial Item, a placeholder field for the initials will be inserted.

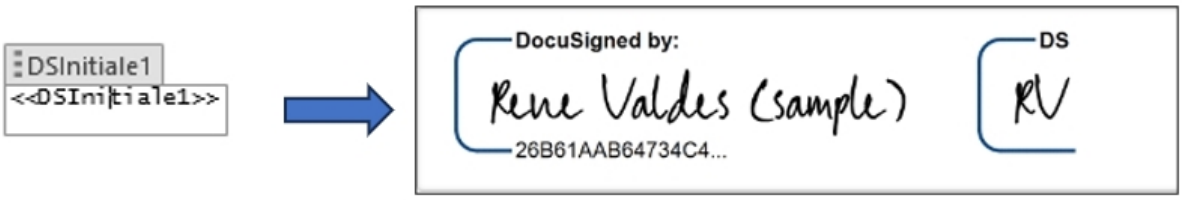


Figure 16: the Initial field:

2.2.3 The Date Signed field

With a click on the Date Signed Item, a placeholder field for the date signed will be inserted and will automatically generate the current date once signed.



Figure 17: the Date Sign field

2.2.4 The Full Name field

With a click on the Full Name Item, a placeholder field for the full name will be inserted. The name that belongs to the signature will be automatically inserted into your document.

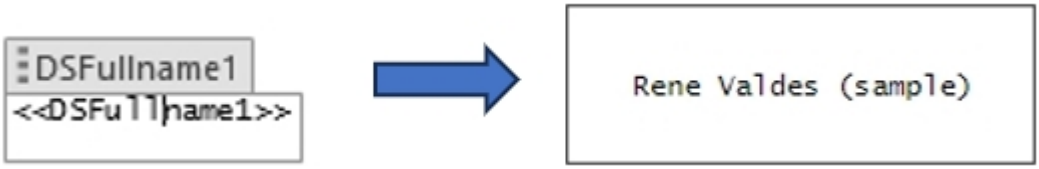


Figure 18: the full Name field

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2.2.5 The Email field

With a click on the Email Item, a placeholder field for the email will be inserted.

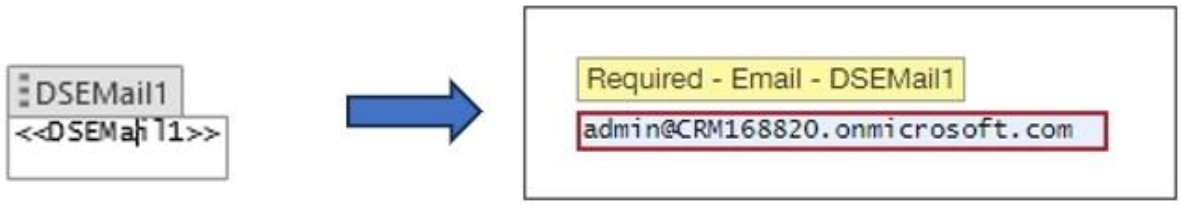


Figure 19: The Email field

2.2.6 The Company field

With a click on the Company Item, a placeholder field for the company will be inserted.



Figure 20: The Company field

2.3. How to set the properties of a DocuSign field

In addition to determining the position of the DocuSign fields, you can also assign several properties to these fields. This is only possible once you have already inserted such a field.

To begin assigning properties to a DocuSign field, please click on the inserted field in the template to select it.

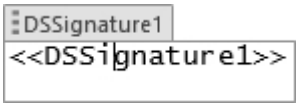


Figure 21: Selected DocuSign field

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

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2.4. DocuSign Properties Window functionalities

The **DocuSign Properties** may vary depending on the field type you have selected. However, in most cases, you will only need to use two different properties, one for the signature and one for the name. The **Field properties** for these specific fields will be explained in detail throughout this chapter.

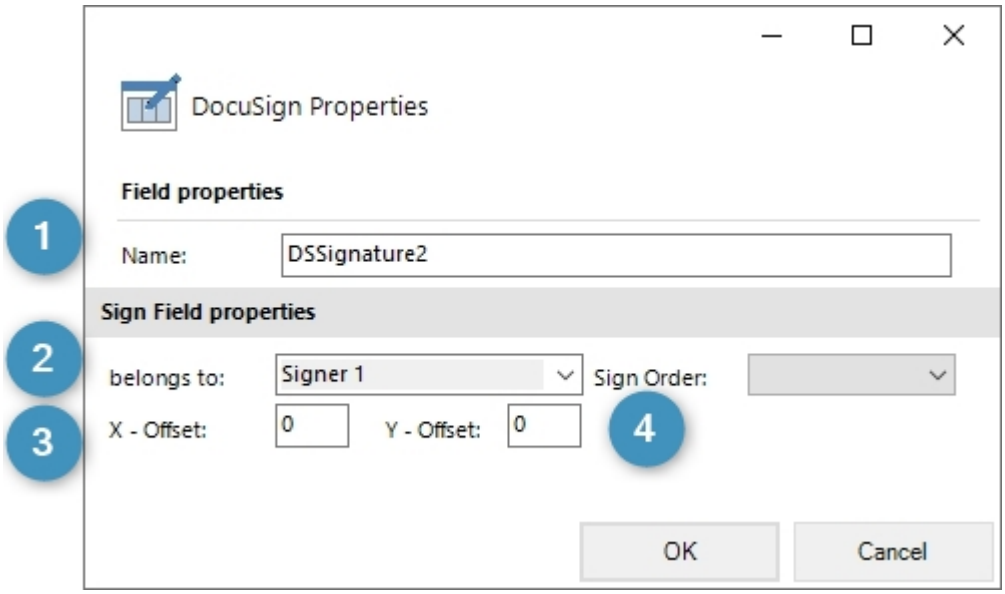


Figure 22: DocuSign properties for Signature

1 **Name**: Defines the field name in the DocumentsCorePack template.
2 **belongs to**: Allows you to effortlessly toggle between various signers. Given the potential existence of multiple signers, it is essential to have the option to switch between them. The complete list of all potential signers will be displayed here. You can also easily add a new signer or remove the last one here.

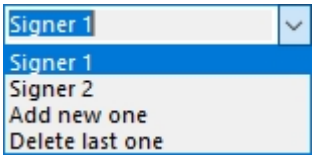


Figure 23: Add, Delete or Select a Signer

3 **X- and Y-Offset**: To adjust the DocuSign field you can set X- and Y- Offset. The X-Offset sets the horizontal offset of the field, and the Y-Offset sets the vertical offset of the field. Both accept the usage of negative values.
4 **Sign Order**: Enables the creation of a specific signing sequence by assigning numerical values, starting with "1" for the first signer, "2" for the second signer, and so forth. If you leave this field blank, the signees will be automatically arranged based on the "belongs to" field. For example, signer 1 will be the first to sign, signer 2 will be the second, and so on. If you wish for all signees to sign simultaneously, please enter "1" in the sign-order fields of all field property windows.

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3. Additional DocuSign Fields (Advanced)

In addition to the existing menu options, there are three additional options specifically designed for DocuSign fields. These additions enhance the user experience and provide advanced functionality when working with DocuSign. The newly introduced fields include the **Text field**, **Note field**, and **Radio Buttons field**, each serving a distinct purpose in expanding the range of options available for customization and interaction within DocuSign.

3.1. The Text-Field

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

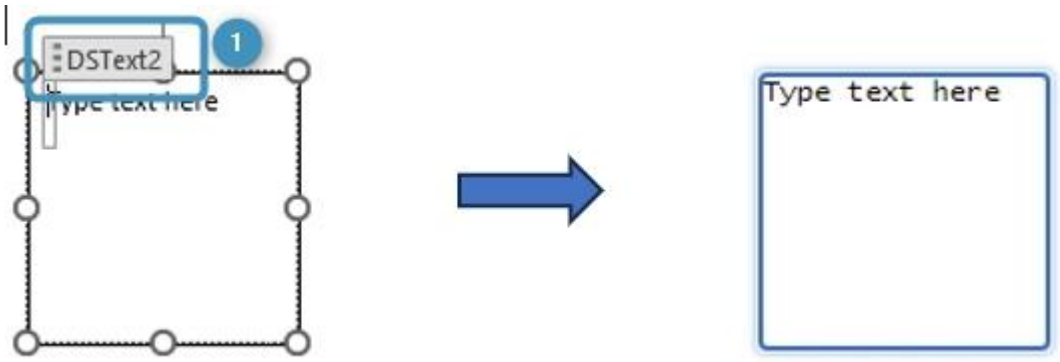


Figure 24: The Text-Field

Please note: The highlighted symbol represents the 1 Content Control feature, which stores extra information about your field. As you may have observed, every field has this Content Control symbol. Unlike other fields, the Text field offers the ability to modify the default text. However, it is important to exercise caution and avoid accidentally deleting the Content Control. Without it, DocumentsCorePack will not function properly for that particular field. To view the Content Control symbol, simply click inside the placeholder field. This information applies to the Note field as well.

There are some more settings available for the Text field properties. In addition to the default settings discussed in the previous chapter, there are settings that will be outlined below. The text entered in the textbox will be displayed in the corresponding DocuSign Text field.

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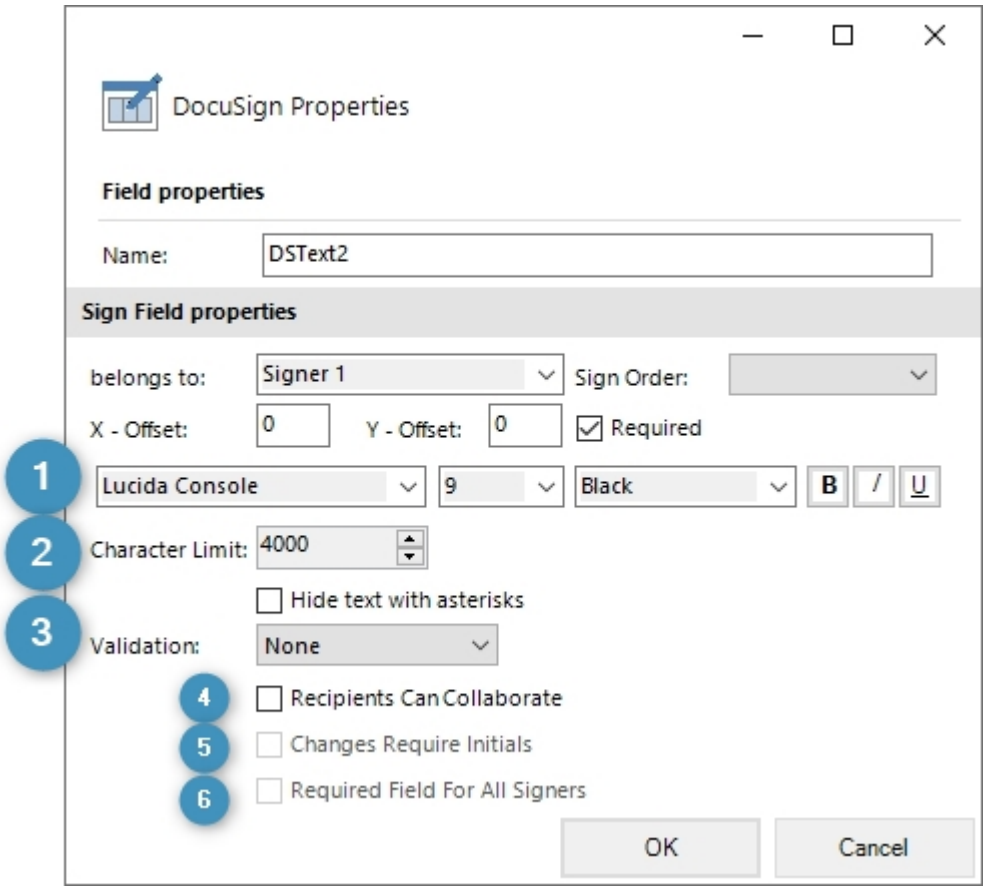


Figure 25: Field properties for Text field

1 **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.
2 **Character Limit**: Refers to the maximum number of characters that can be entered or displayed in the Text field.
3 **Hide text with asterisks**: Hide the text for the other signers by checking this checkbox.
4 **Validation**: Select a validation pattern for the field.
5 **Recipients can Collaborate**: Recipients have the permission to change the inserted value if you check this checkbox.
6 **Changes Require Initial**: Check this checkbox in order to save changes together with the initials of the person who has changed the field previously.
7 **Required Field For All Signers**: All signers are required to fill out the field if you check this checkbox.

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3.2. The Radio Button field

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



Figure 26: The Radio Buttons field

However, the Radio Button field properties offer additional settings. Along with the default settings, which were thoroughly explained in the previous chapter, and the Text field settings, which were discussed on the preceding page, there are further settings available for customization, as described below. The Radio Button serves as a placeholder for the selectable options within the 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.

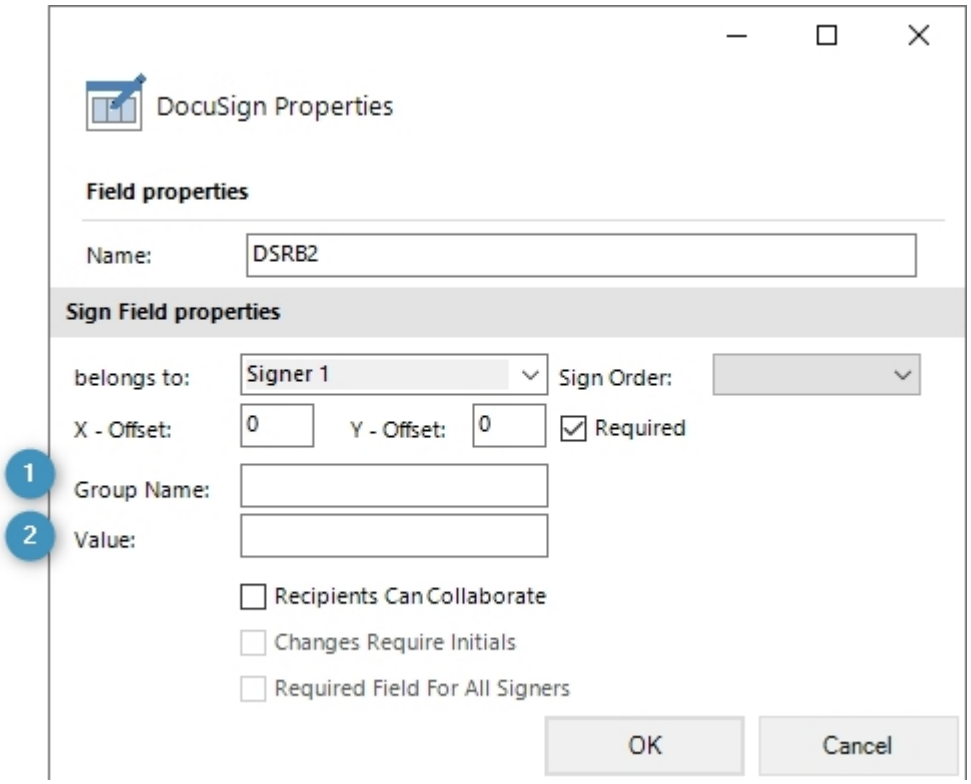


Figure 27: DocuSign properties for Radio Button field

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3.3. The Note Field

Unlike regular placeholder fields, the placeholder in the Note field is slightly distinct. Given that you have the ability to modify the default text, it is important to exercise caution and avoid unintentionally deleting the Content Control associated with it.

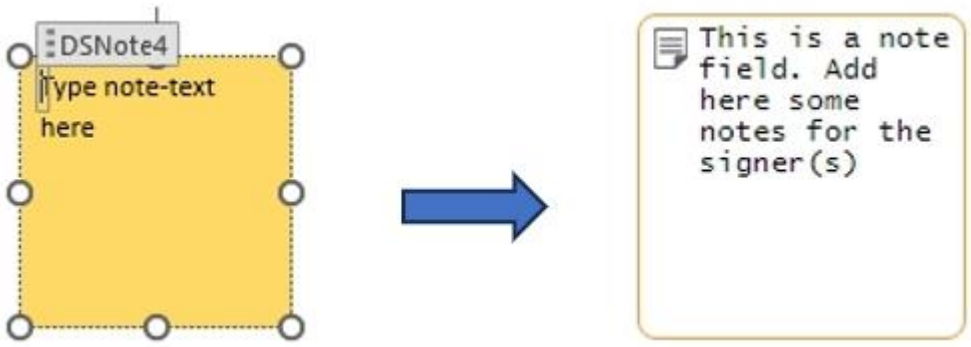


Figure 28: The Note Field

This is what the Note field properties look like. They contain the default settings, which are explained in detail in the previous chapter. The text from the textbox will be shown in the DocuSign Note field.



Figure 29: Field properties for Note Field

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4. Sending Payment Requests via DocuSign

Please note: Prior to initiating the creation of a template with a payment field, ensure that you are logged into your DocuSign environment. To enable the necessary settings in your template, we require specific information regarding the payment gateways. You can access this information by navigating to the **Admin** section within **Integrations** > **Payments**.

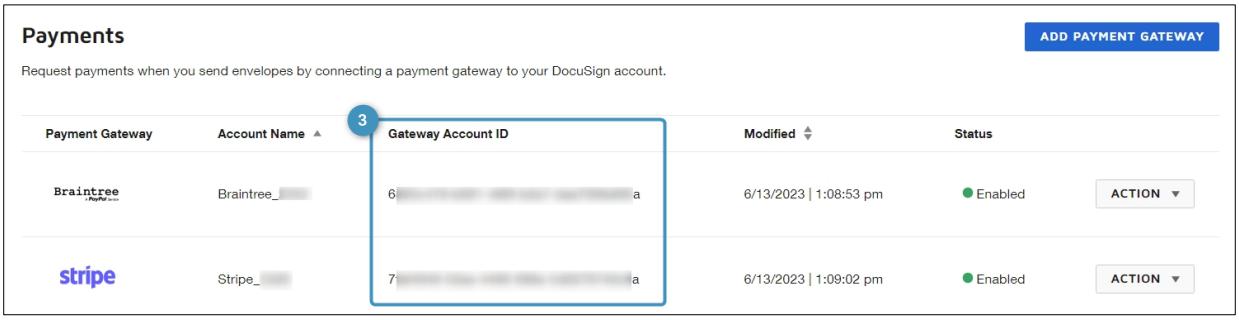


Figure 30: Information on the payment gateways

To proceed, we will require the Gateway Account ID. Please copy the value of the Gateway Account ID.

Next, open the template where you wish to incorporate the payment functionality. Click on **Insert MailMerge Fields** and then select the **Advanced Template Settings** button.

Within the ❶ **Electronic Signature** tab, you will find two settings necessary for utilizing the payment function. First, choose the desired ❷ **Currency** for the payment from the first field. Then, paste the ❸ **Gateway Account ID (see Figure 23)** of the Payment Gateway into the second field. To save these modifications, click on the **OK** button.
❹ **Access code**: The DocuSign Access Code is an option set on the recipient of the envelope. It is possible to assign the Access Code to specific recipients with different Access Codes. Learn more here.

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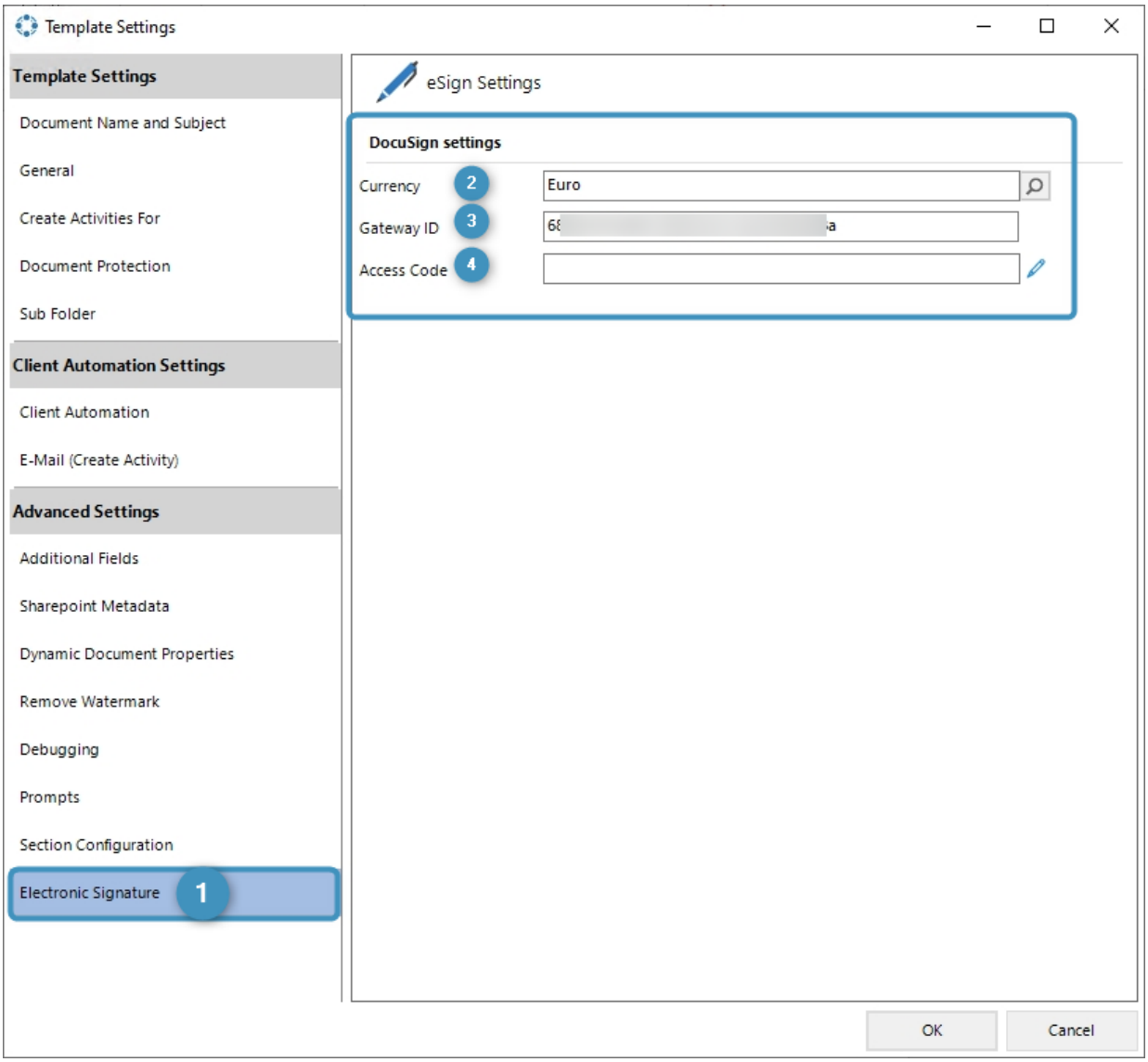


Figure 31: Template Designer DocuSign settings

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Now you can insert the Payment Sum field in your document. Click on the **Insert Field** button and then select the **Payment Sum** field, as you can see highlighted below.

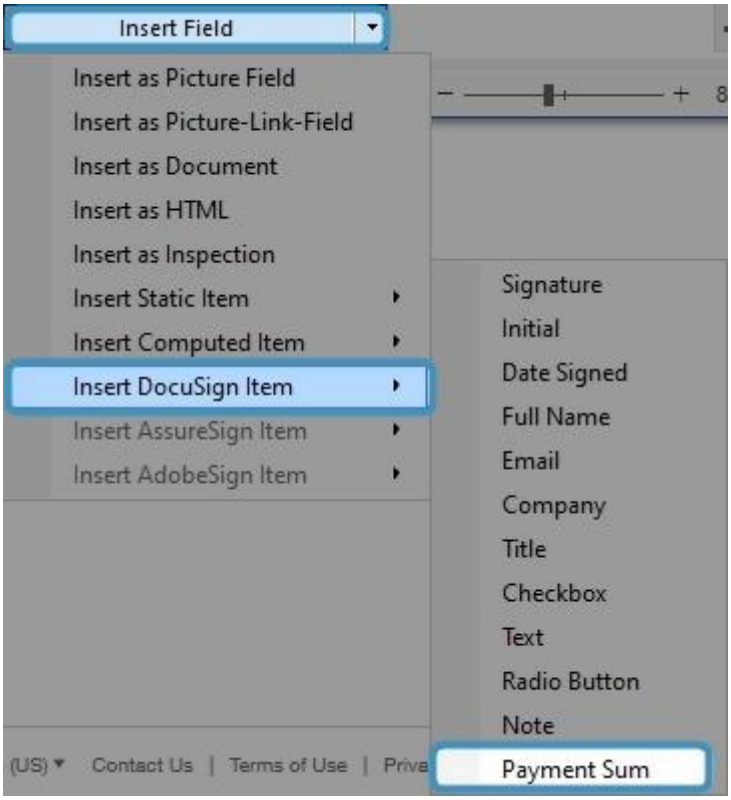


Figure 32: Information on the payment gateways

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

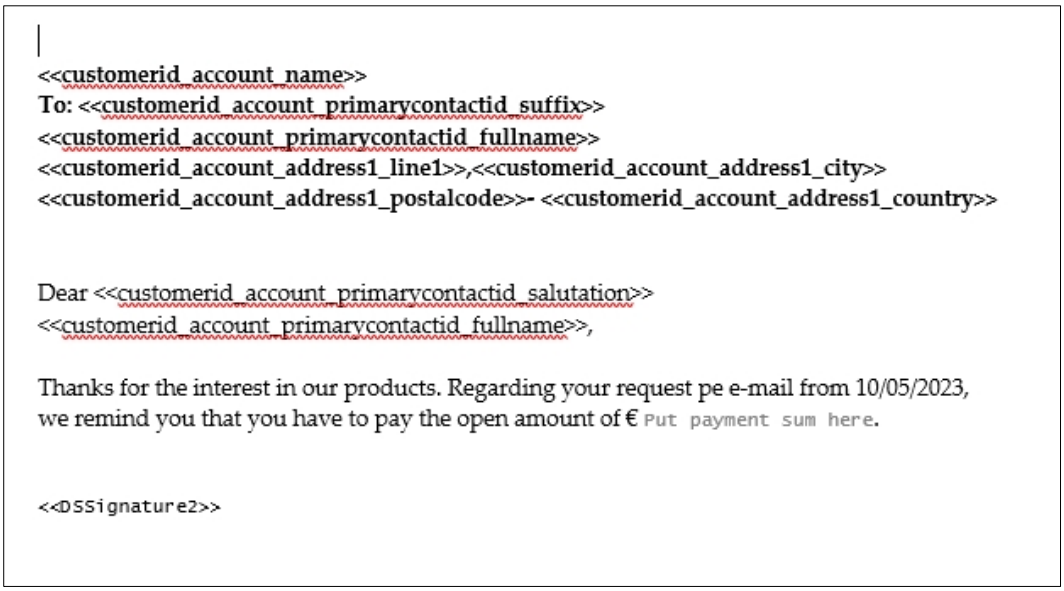


Figure 33: The Payment Sum field placeholder

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You can place the **<<totalamount>>** field inside the **Payment Sum** field.

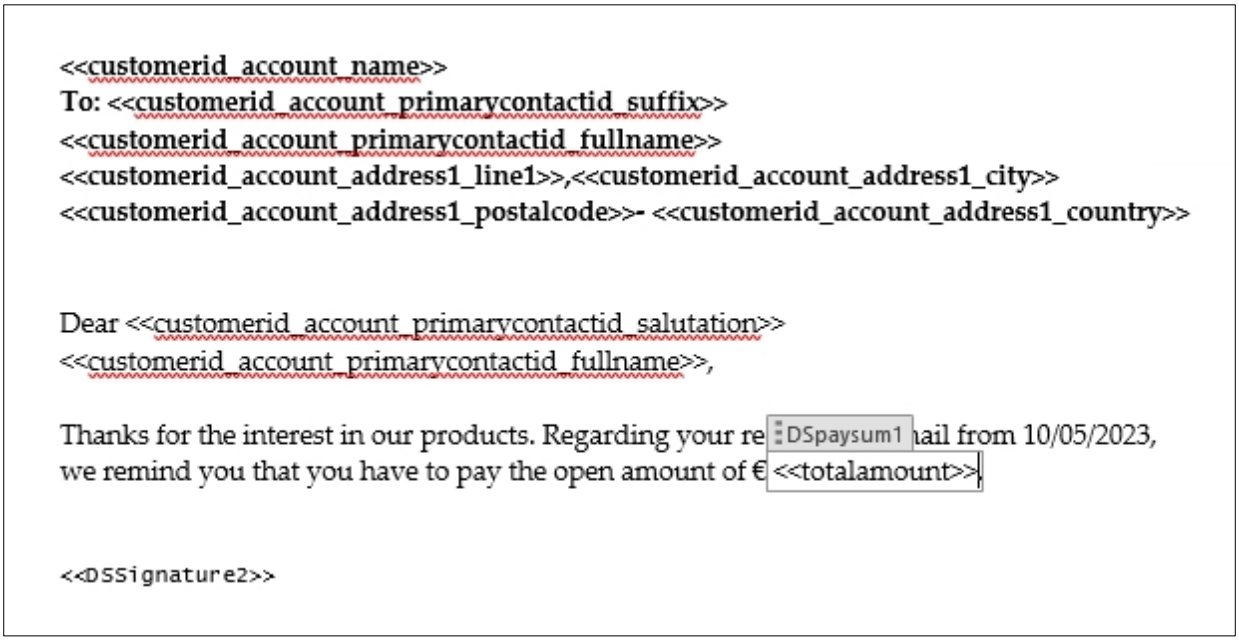


Figure 34: <<totalamount>> field inside Payment field

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- and Y – Offset).

Complete 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.

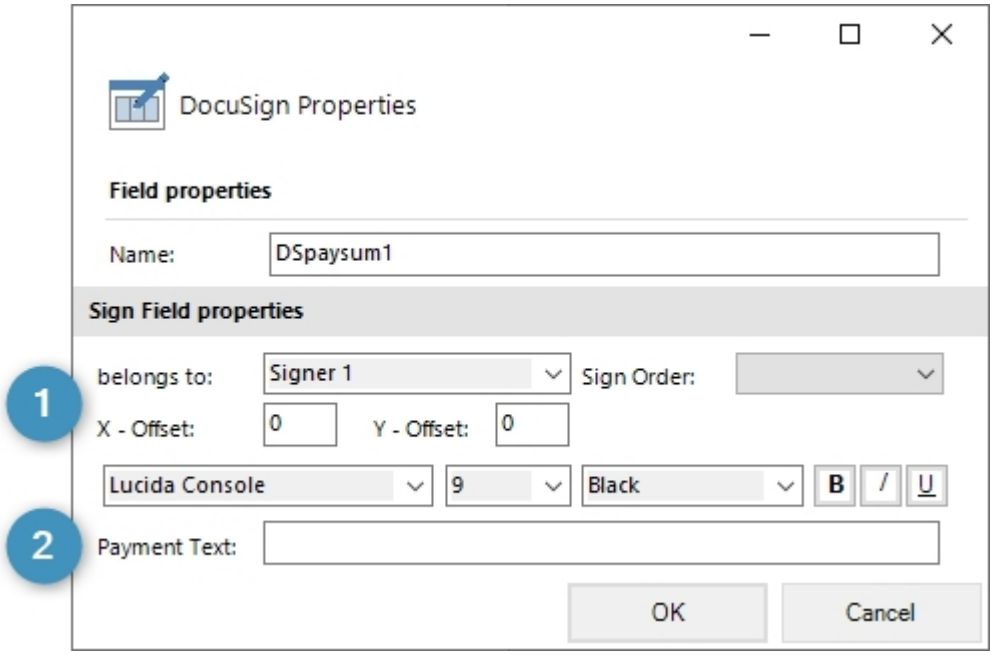


Figure 35: Set Offset; optional Payment Text

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You can then 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 the attach document **as DocuSign email** option.

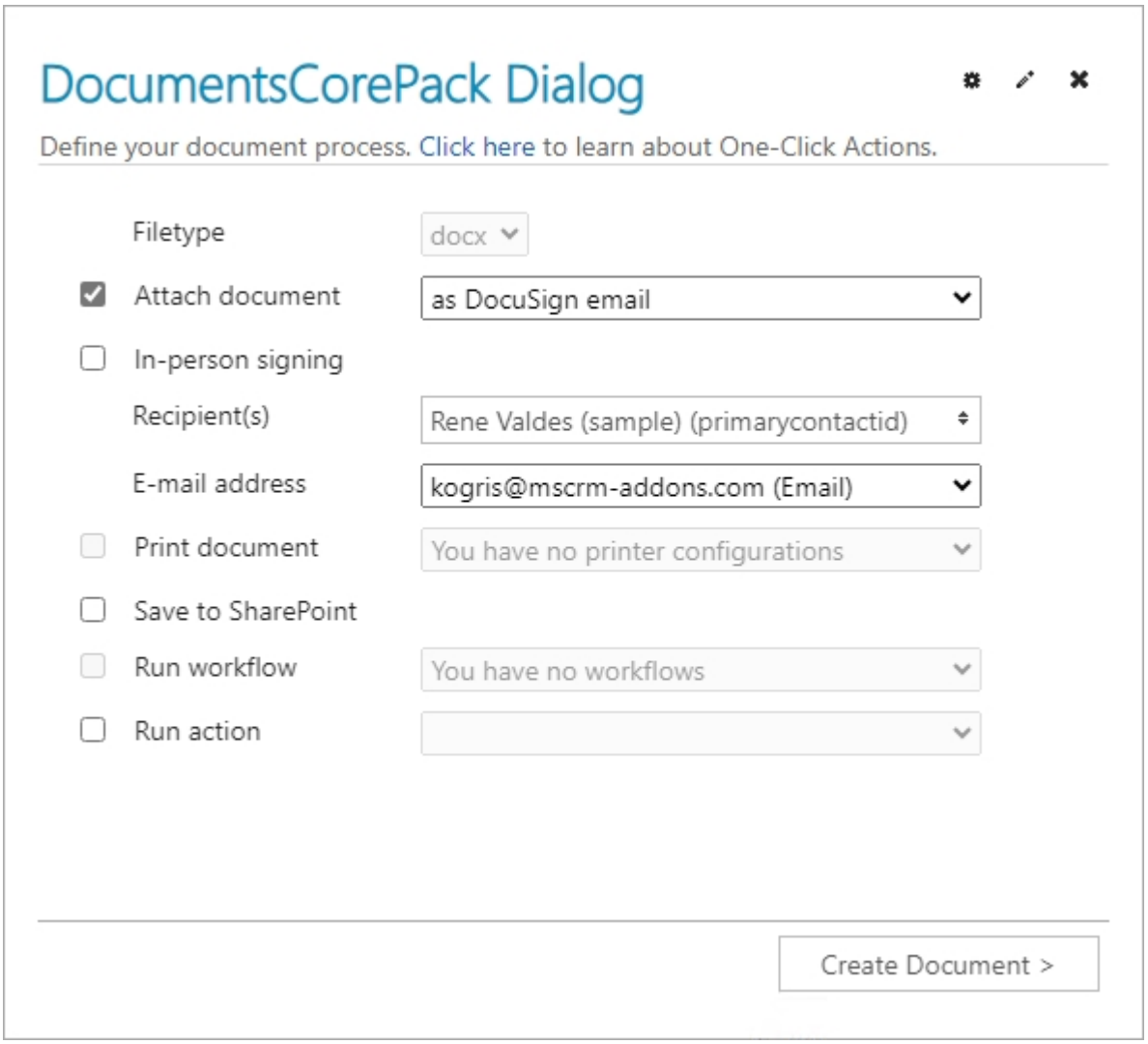
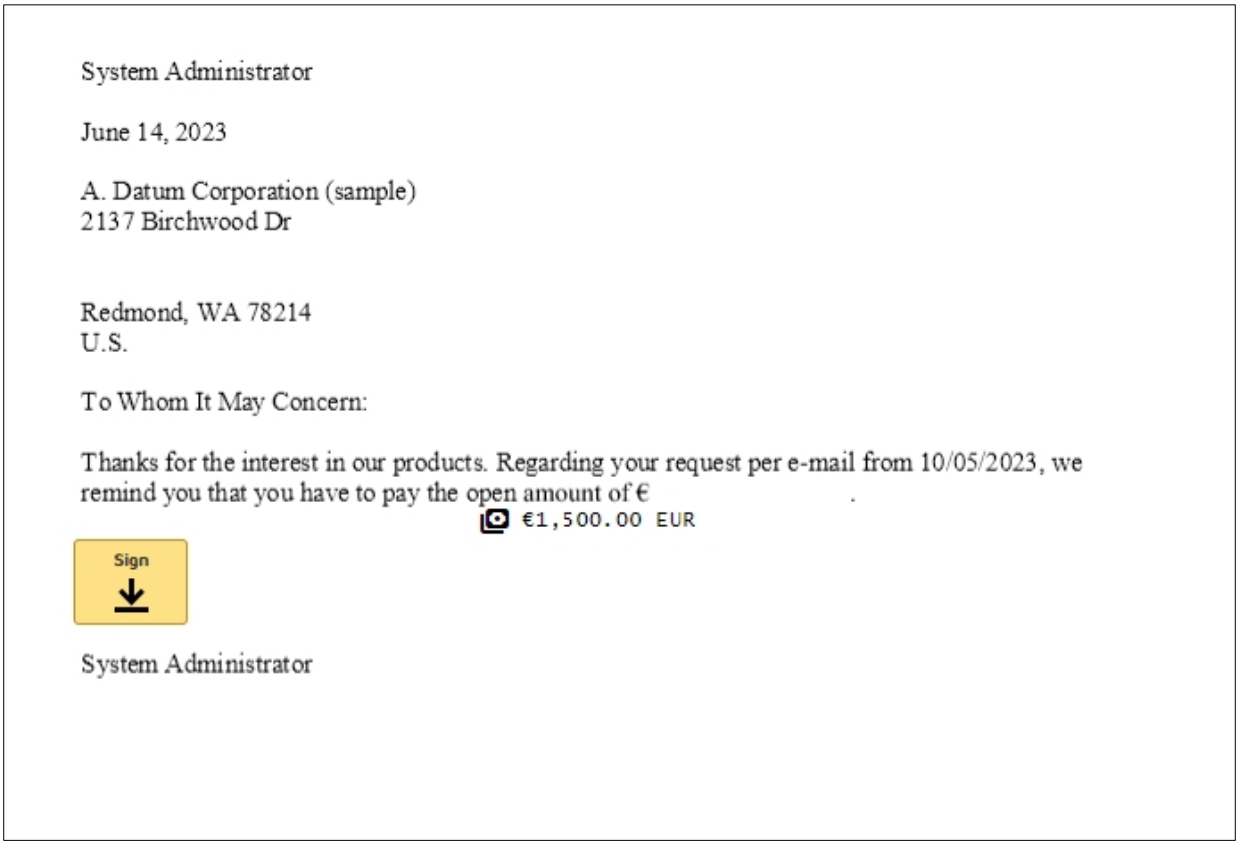


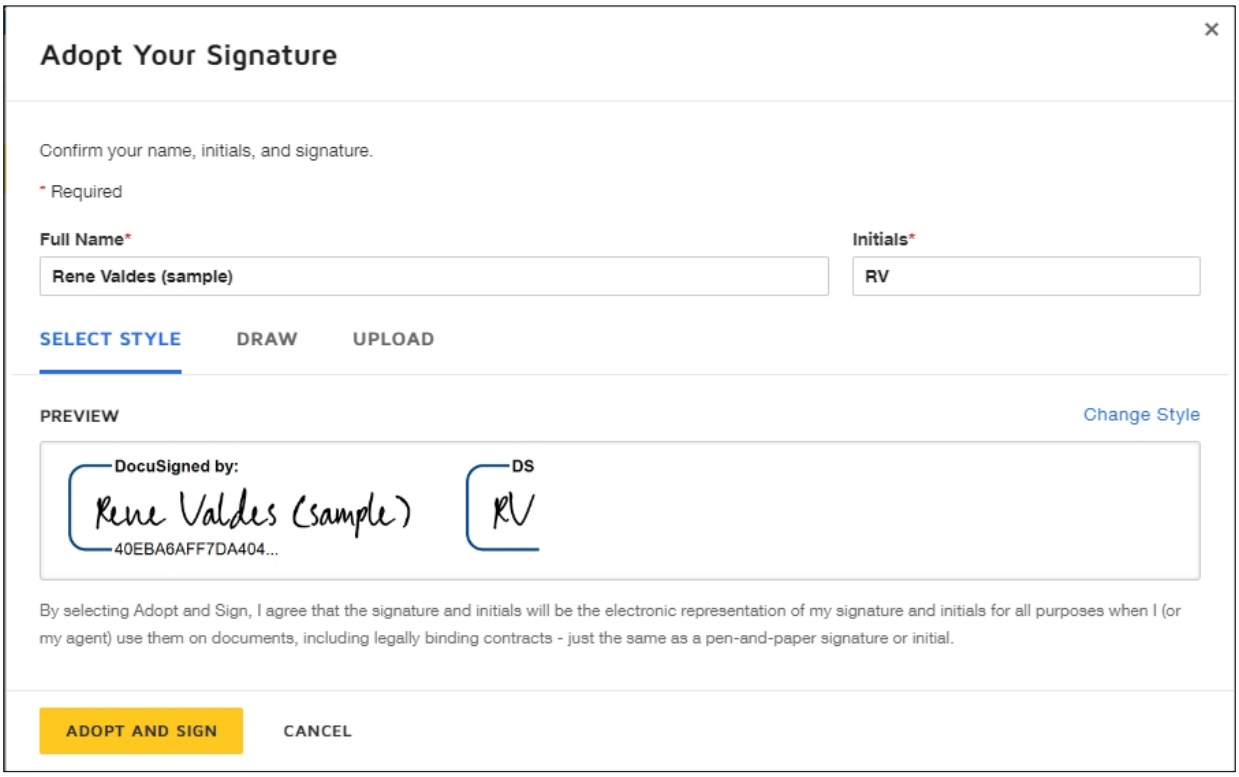
Figure 36: Attach document as DocuSign e-mail

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You will then receive this e-mail. Click on the Sign field.

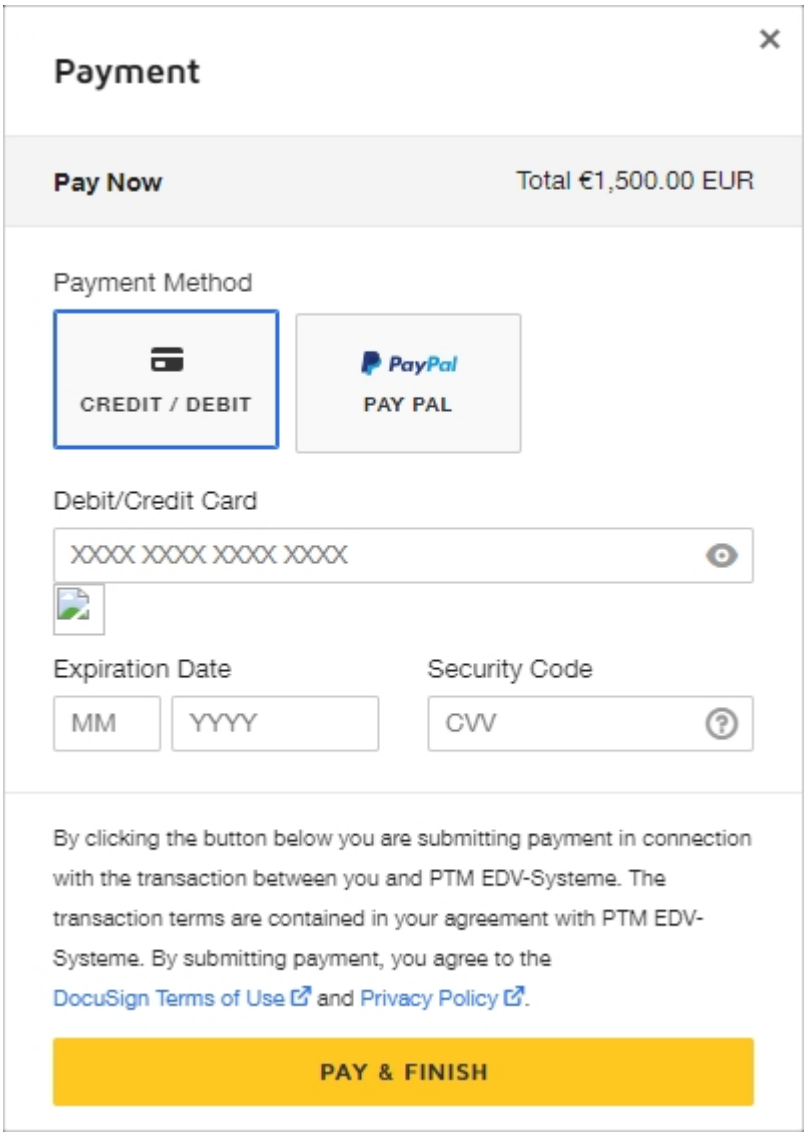


Check your name initials and signature and confirm with **Adopt and Sign**.



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Select a Payment Method, fill out the fields and confirm with **Pay & Finish**.



Please note: 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 mismatching the payment amount.

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5. Access Code

DocuSign Access Codes can be defined for recipients of the envelope. It is possible to assign the Access Code to specific recipients with different Access Codes.

Create a new settings-key with the following values:

Product: **AutoMerge**
Name: **DocuSignAccessCode**
Value: **true**

If you need guidance for creating a settings key, find more information here.

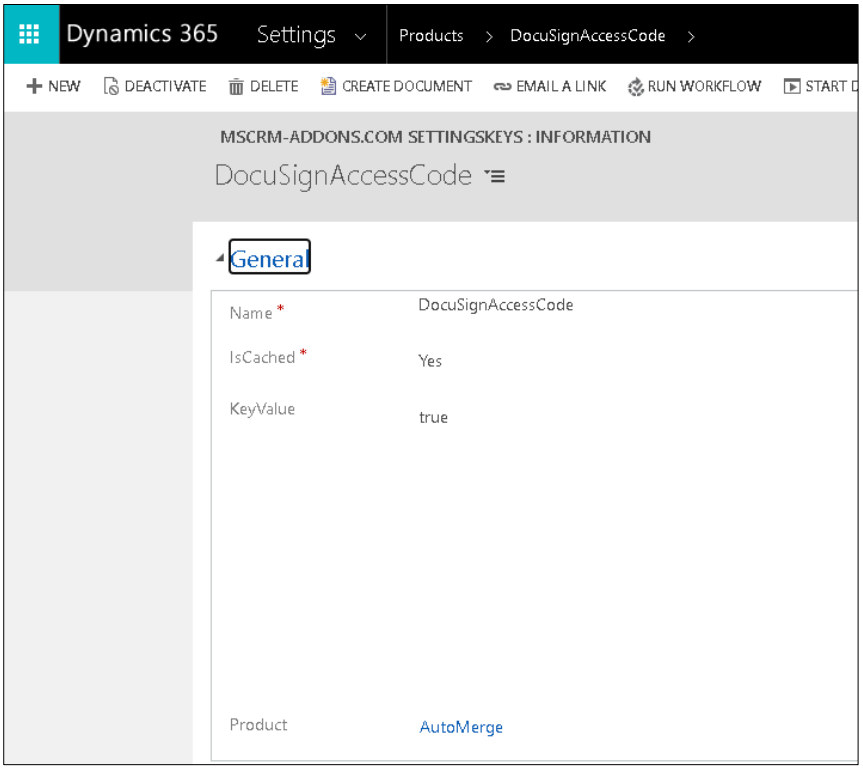


Figure 37: Settings key for DocuSign AccessCode

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After you have performed these steps, you will have the option to define and set up the Access Code in the One-Click-Action (OCA) configuration. The DocuSign Access Code is only available in combination with an OCA.

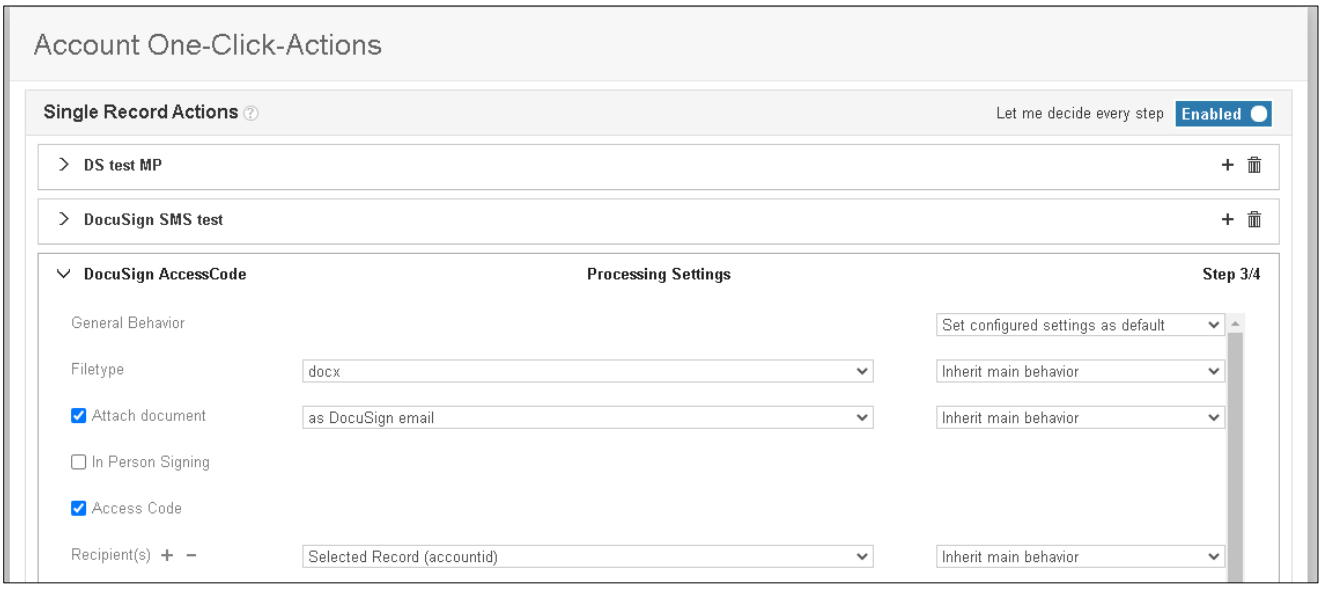


Figure 38: Account One-Click-Actions

That concludes the first part of how to install, set up and enable your customization.

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Now let´s go to the second part. Open the template you want to sign with DocuSign or create a new template where you set the pattern for the Access Code.

Click on the 1 Advanced Template Settings, then go to the 2 Electronic Signature tab. Here you will find a new option: 3 Access Code. With a click on the pencil, you can edit the pattern. Find details about the syntax here in our blog.

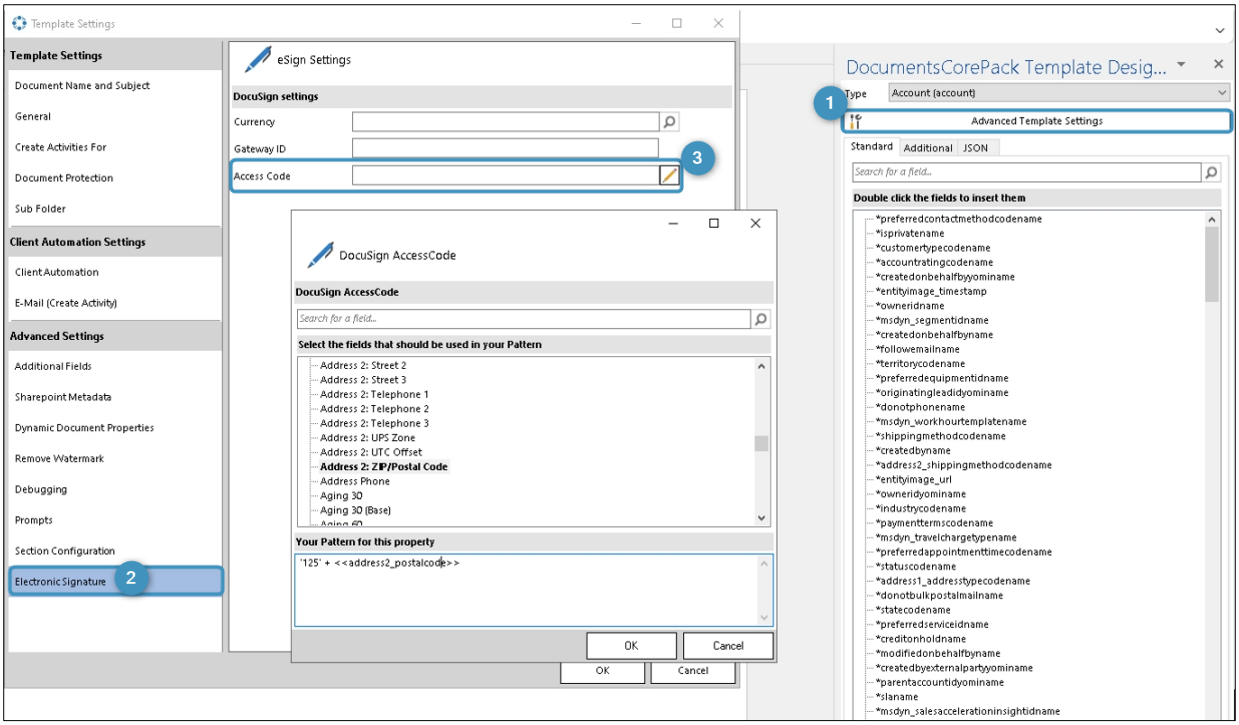
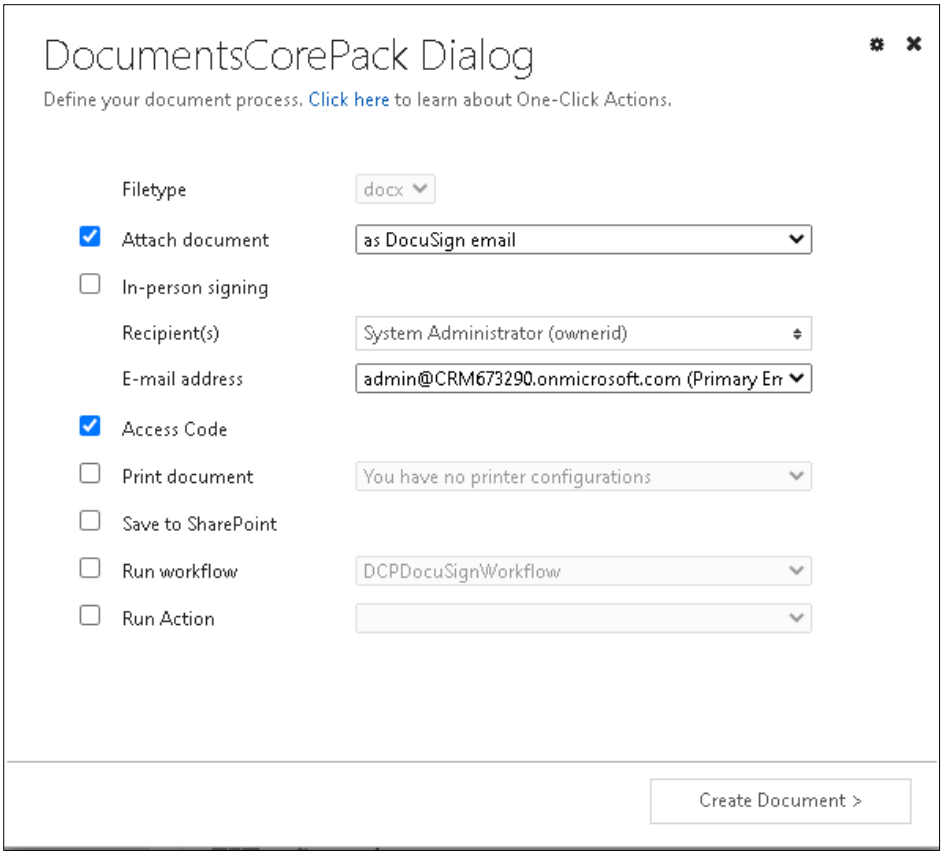


Figure 39: Access Code

If you have properly configured your OCA settings, you will notice an additional checkbox when initiating the OCA. Recipients who have selected this checkbox will be required to enter an Access Code before they can access the document for signing.

Please note: If the chosen template does not have an Access Code pattern defined, DocuSign will not prompt for an Access Code.

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Please note: The Access Code does not work if the sender and recipient are the same. For example, the Access Code would not work if the DocuSign user is usera@demo.com and the recipient is also usera@demo.com.

This is very important to consider while testing.

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6. Tutorials (How to´s)

This chapter offers valuable tutorials that guide you through the process of effectively utilizing DocuSign. These tutorials are designed to assist you in mastering the various functionalities and features of DocuSign, enabling you to work more efficiently.

6.1. How do I merge a document and send it to DocuSign

In your Dynamics 365, open an account, for example, and click the **Create Document** button.

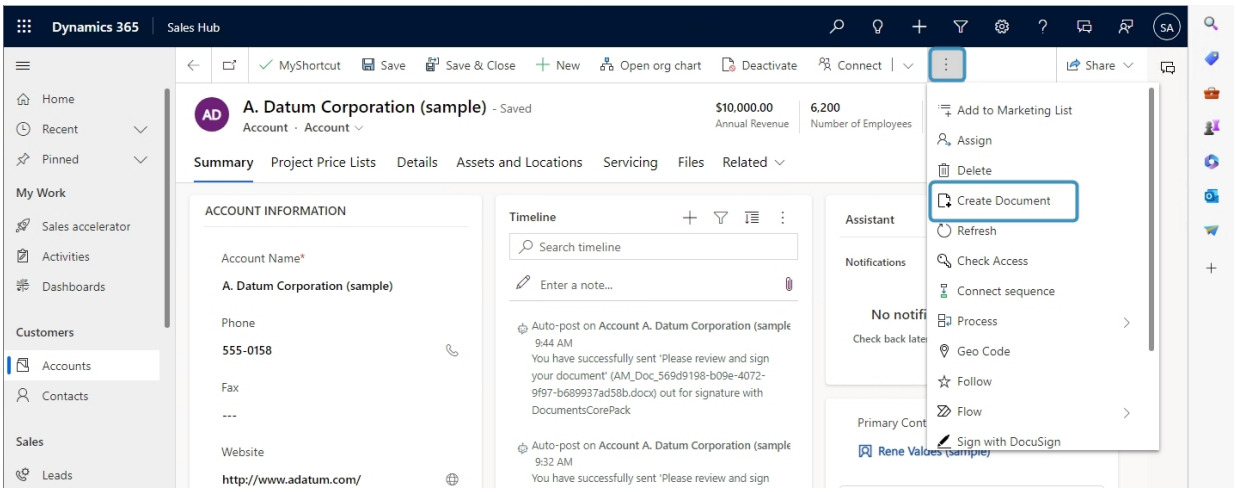


Figure 40: Create Document button in Dynamics 365

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Select the template you want to execute.

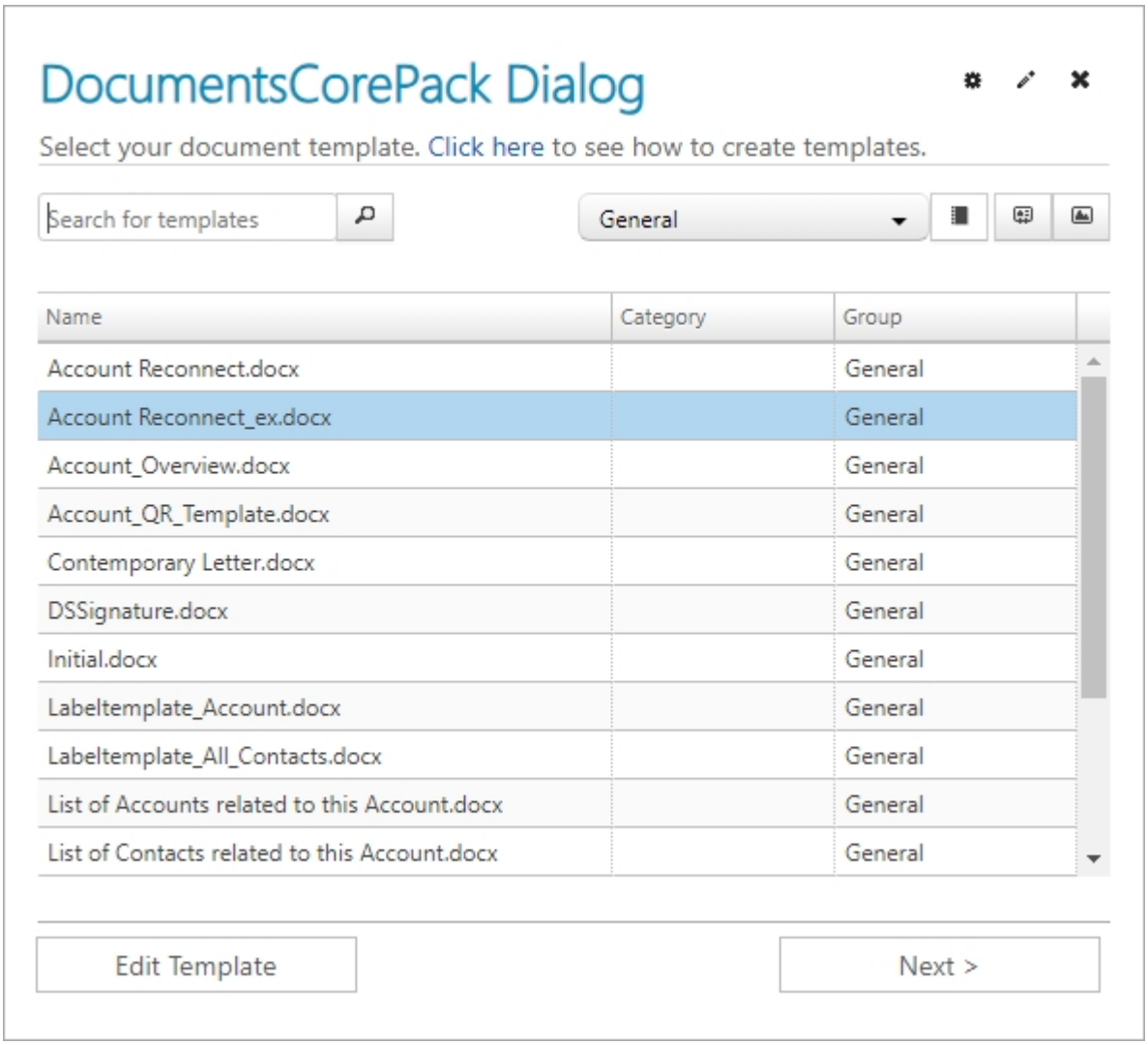


Figure 41: Select a template in DocumentsCorePack Dialog

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Attach the document as a DocuSign email and enter the email address of the recipient.

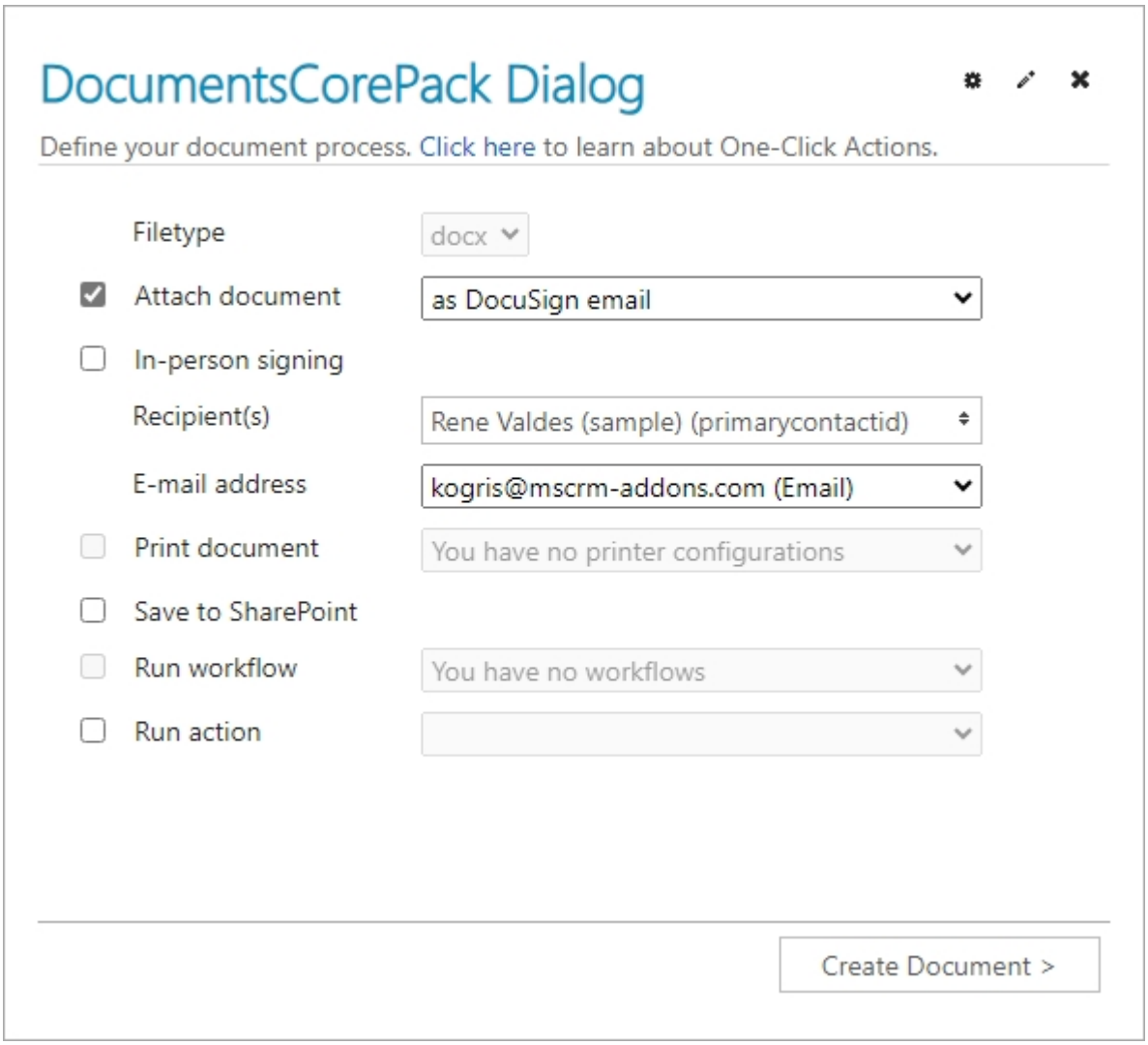


Figure 42: Attach document as email and enter email recipient

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Click on **Create Document** and **Finish** to send the document to DocuSign.

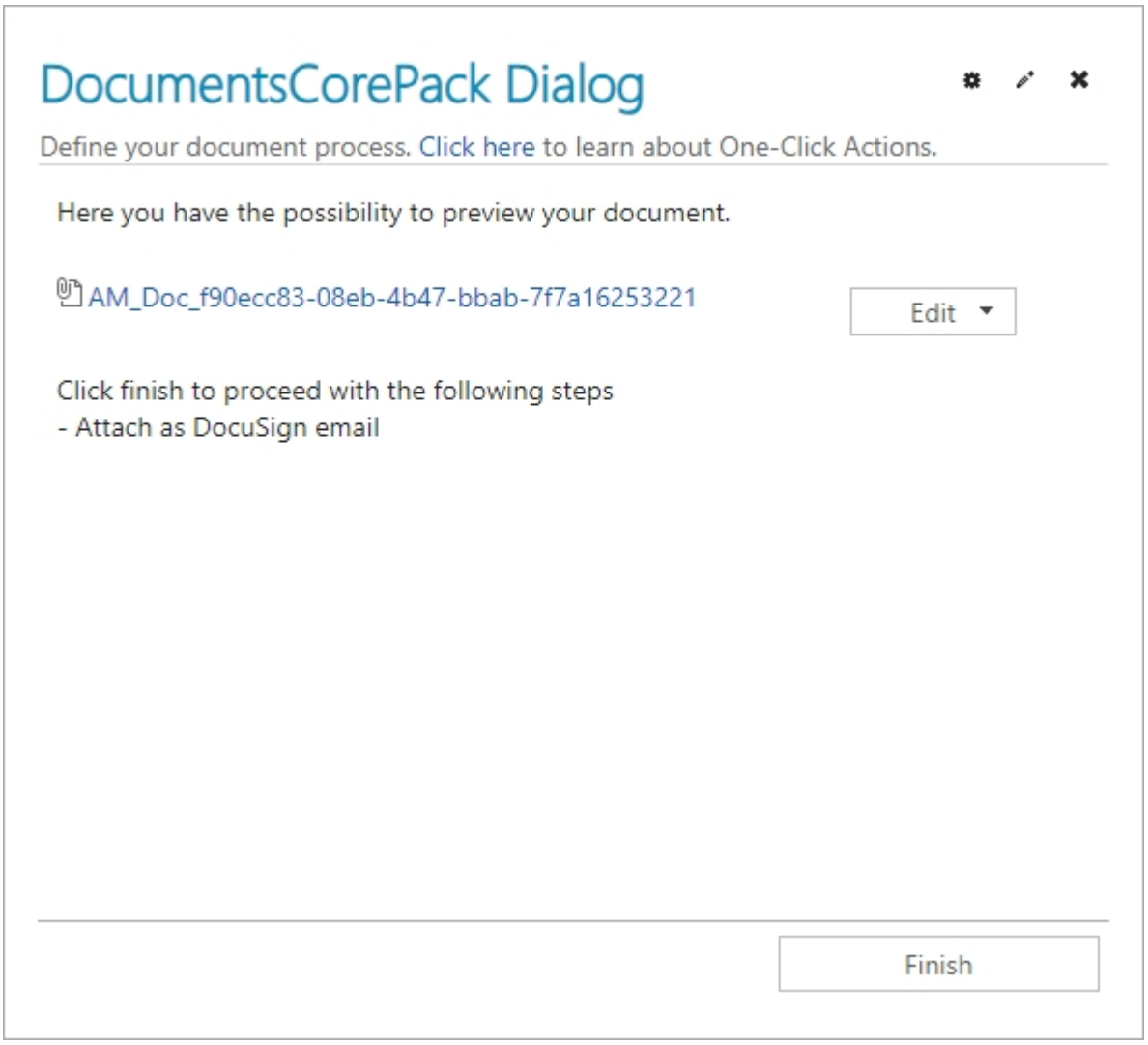


Figure 43: Click Finish

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6.2. How do I sign a document in DocuSign

To start signing a document, click **Review Document** in the received DocuSign email. The document opens. Now sign the document by clicking on **Sign**.

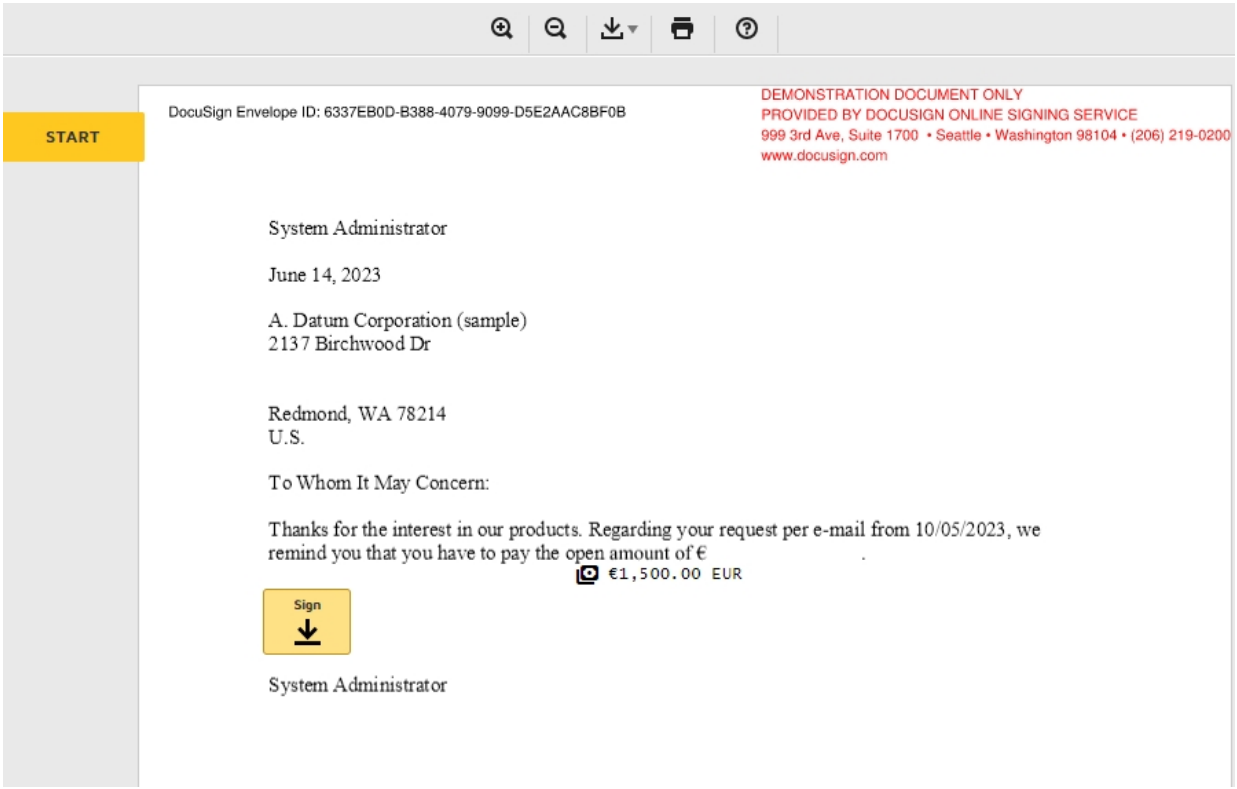


Figure 44: DocuSign document attached to email

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Click on **Finish**, and congratulations. You have signed your first document!

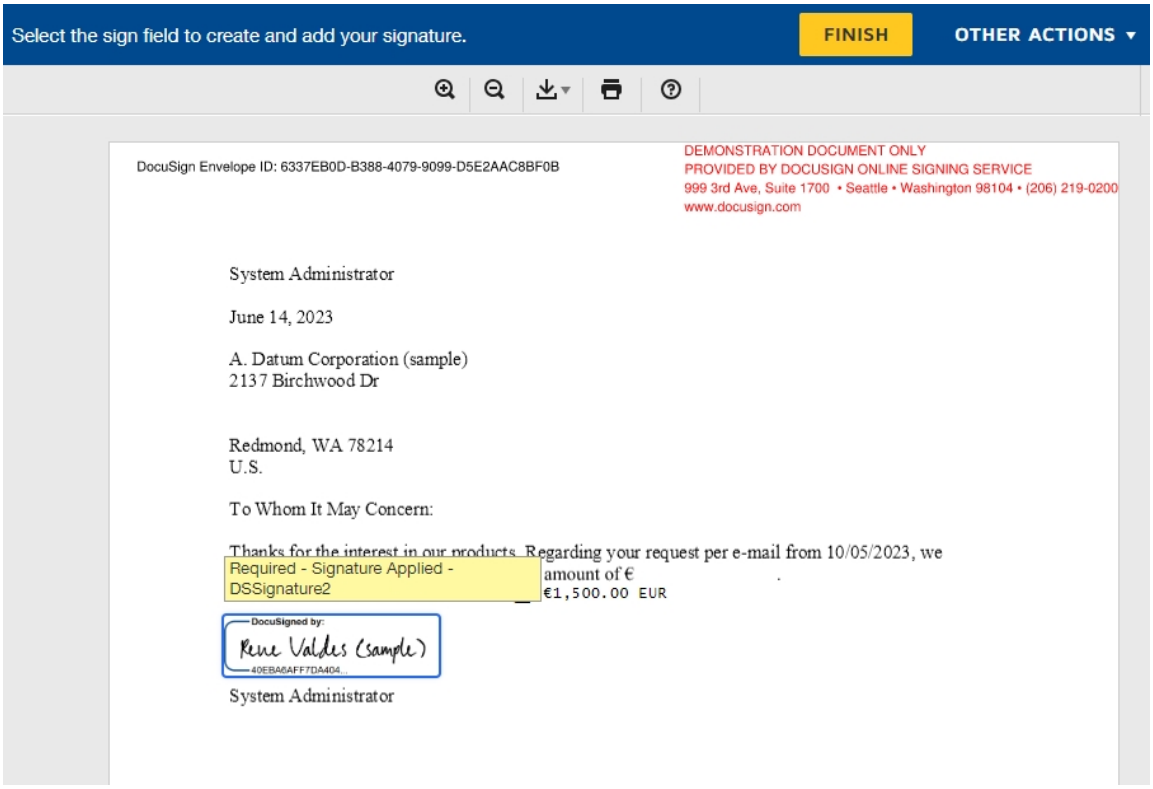


Figure 45: Finish sign process

You will get an email with the signed document attached.

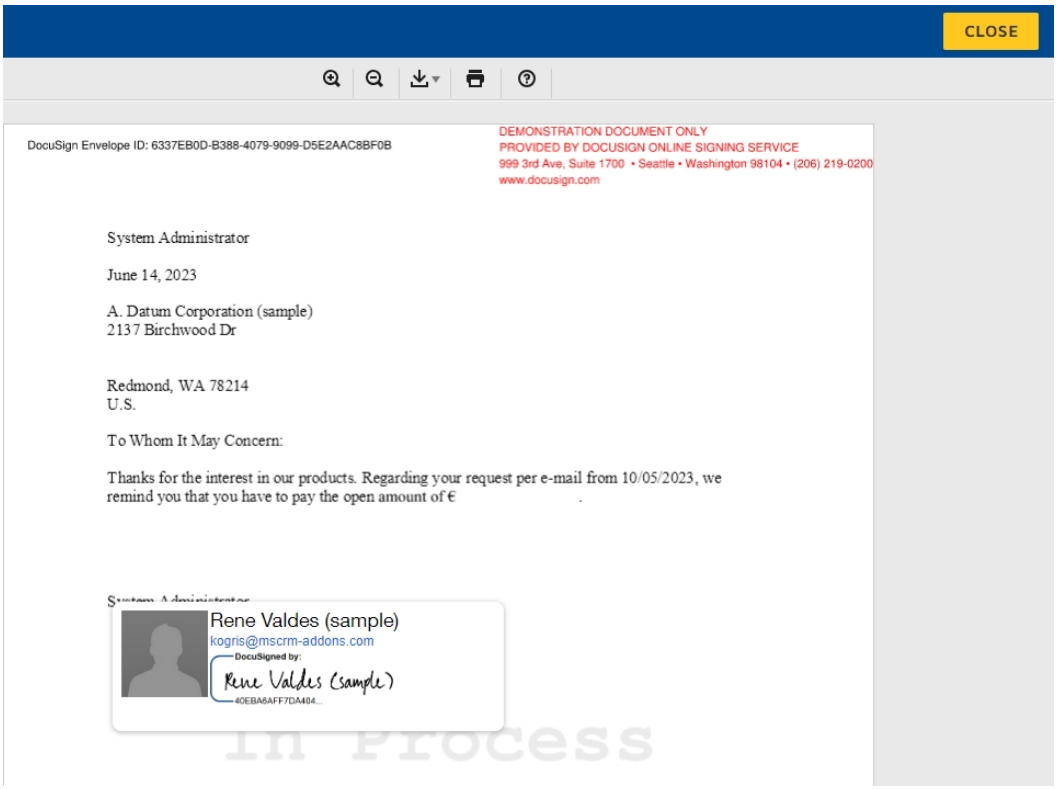


Figure 46: DocuSign document send per e-mail

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In Microsoft Dynamics 365, you will see a post added to your entity.

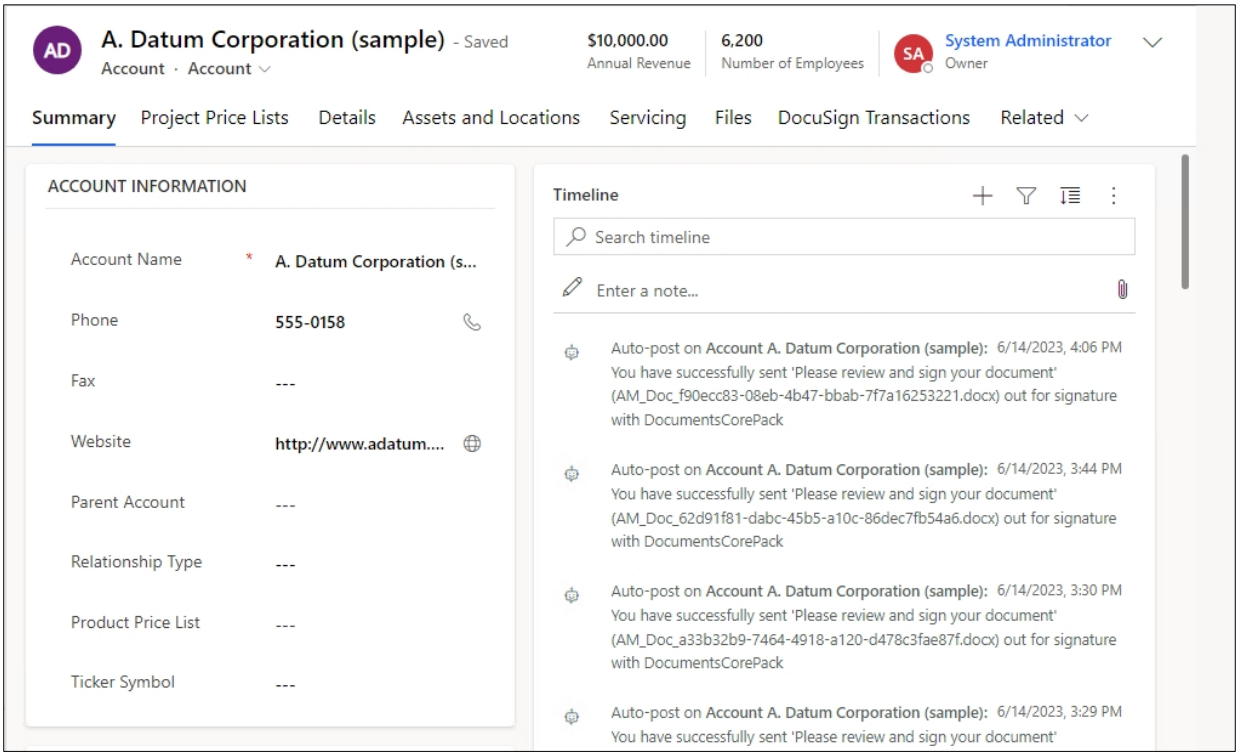


Figure 47: Post added to account

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**.

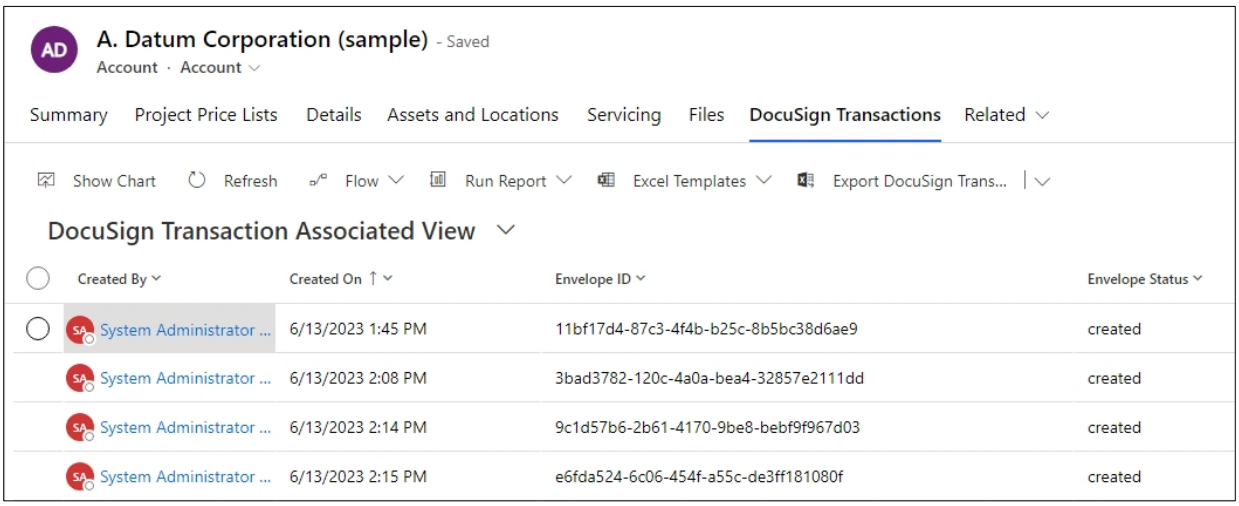


Figure 48: DocuSign Transactions overview

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6.3. How to get the values back from DocuSign

If you use our latest version of DocumentsCorePack DocuSign, 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.

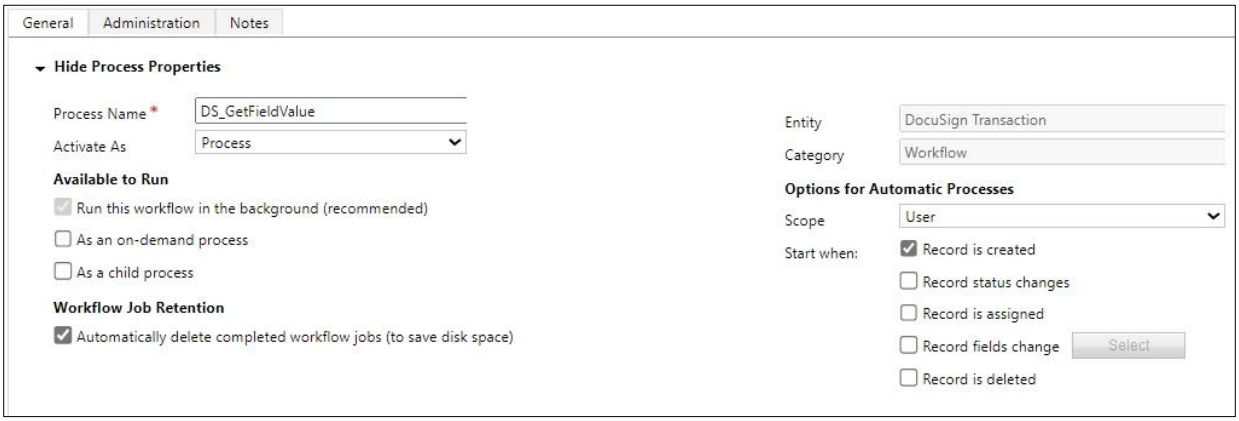


Figure 49: GetFieldValue

Please note: DocuSign has its own option to get values back and write them to Dynamics 365. 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.
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 the figure below.

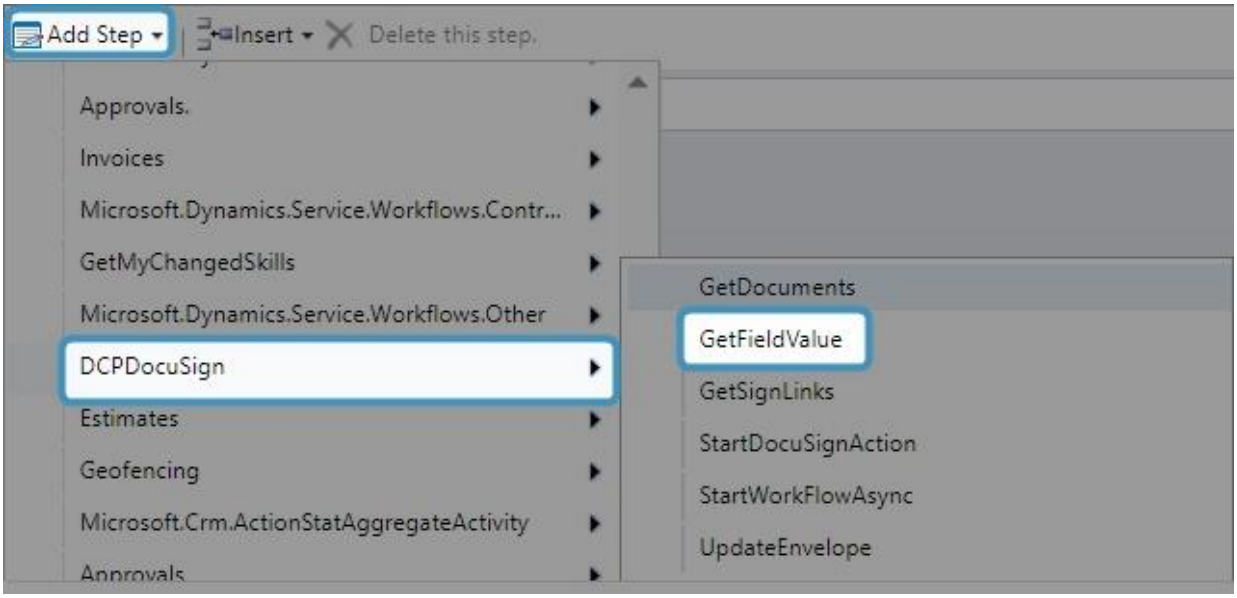


Figure 50: Add step GetFieldValue in Workflow

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

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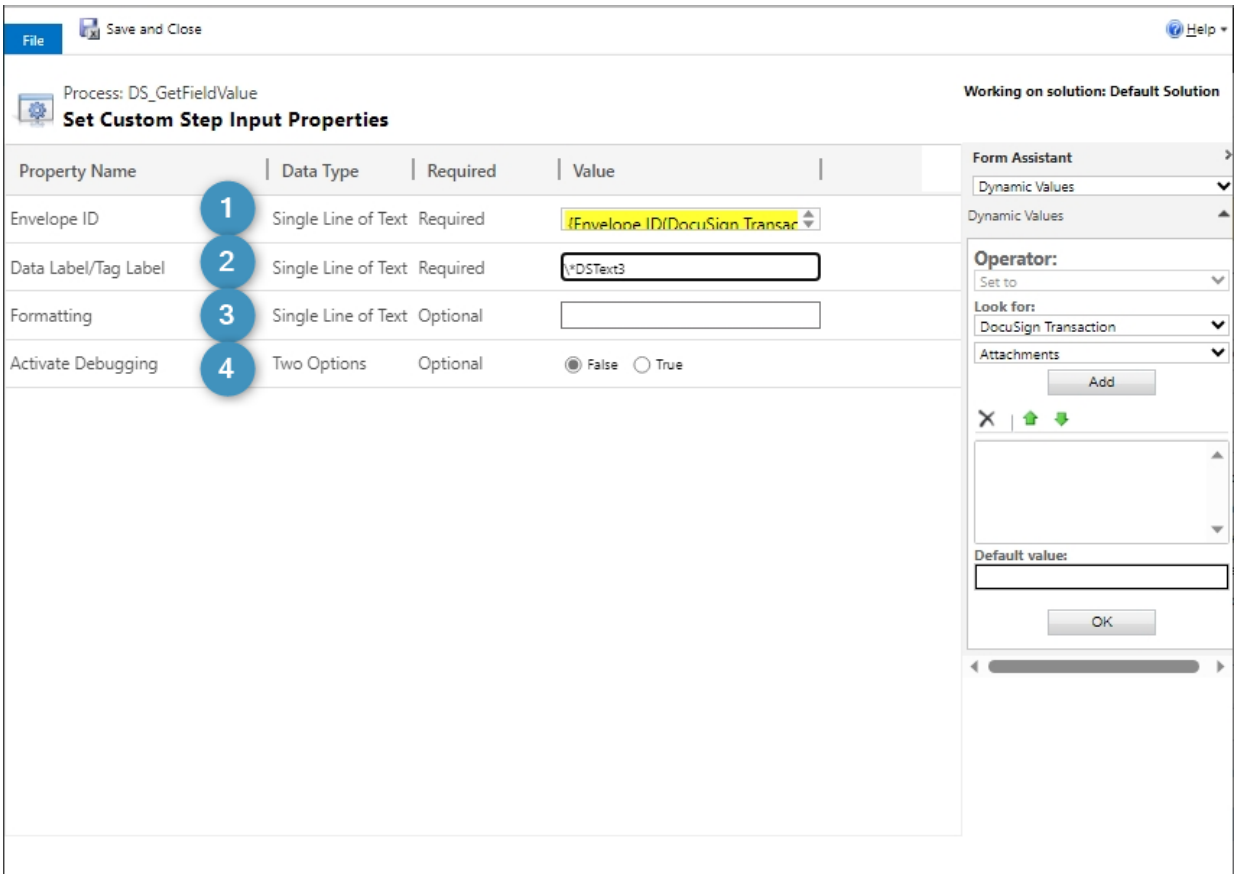


Figure 51: Set custom Step Properties

1 **Envelope ID**: This field is, like the name says for the envelope id.
For example: 4e8ee1db-04a0-4d5b-94b7-04c24e466f36

2 **Data Label/Tag Label**: This is the name of the related field.
For example: *DSText3

Please note: 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 > Copy**

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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

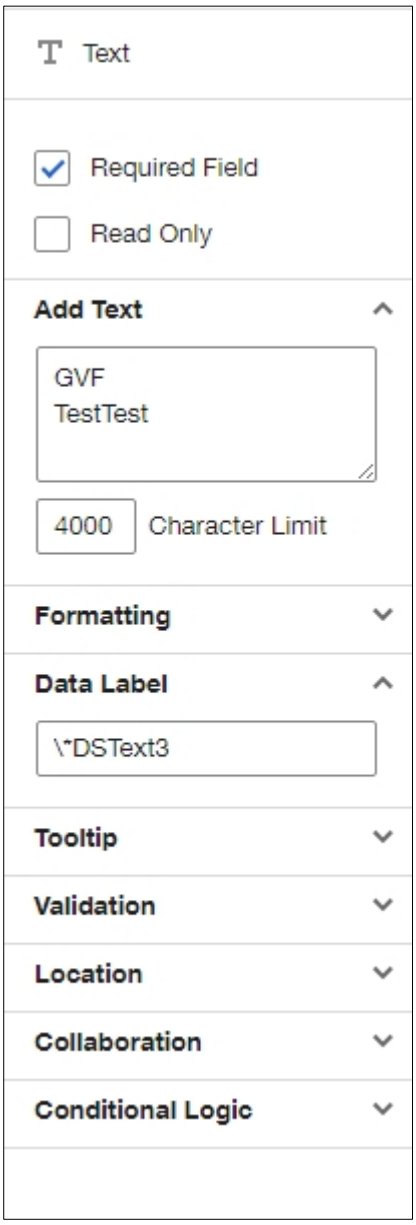


Figure 52: Data Label

3 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

4 **Activate Debugging**: For debugging purpose, you can check the **True** checkbox.

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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.

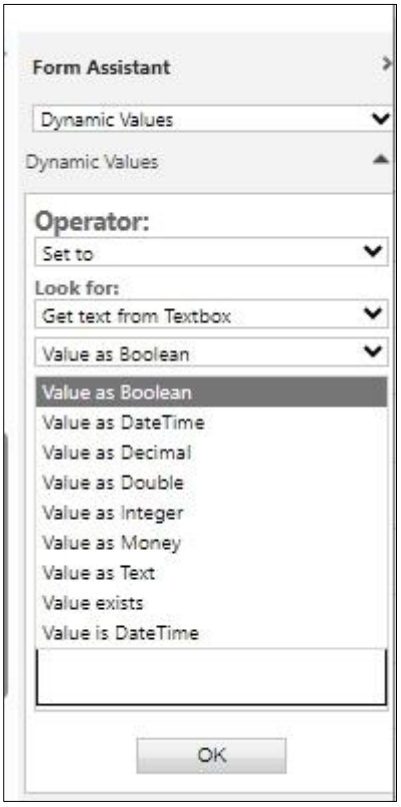


Figure 53: Output parameters for the GetFieldValue

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

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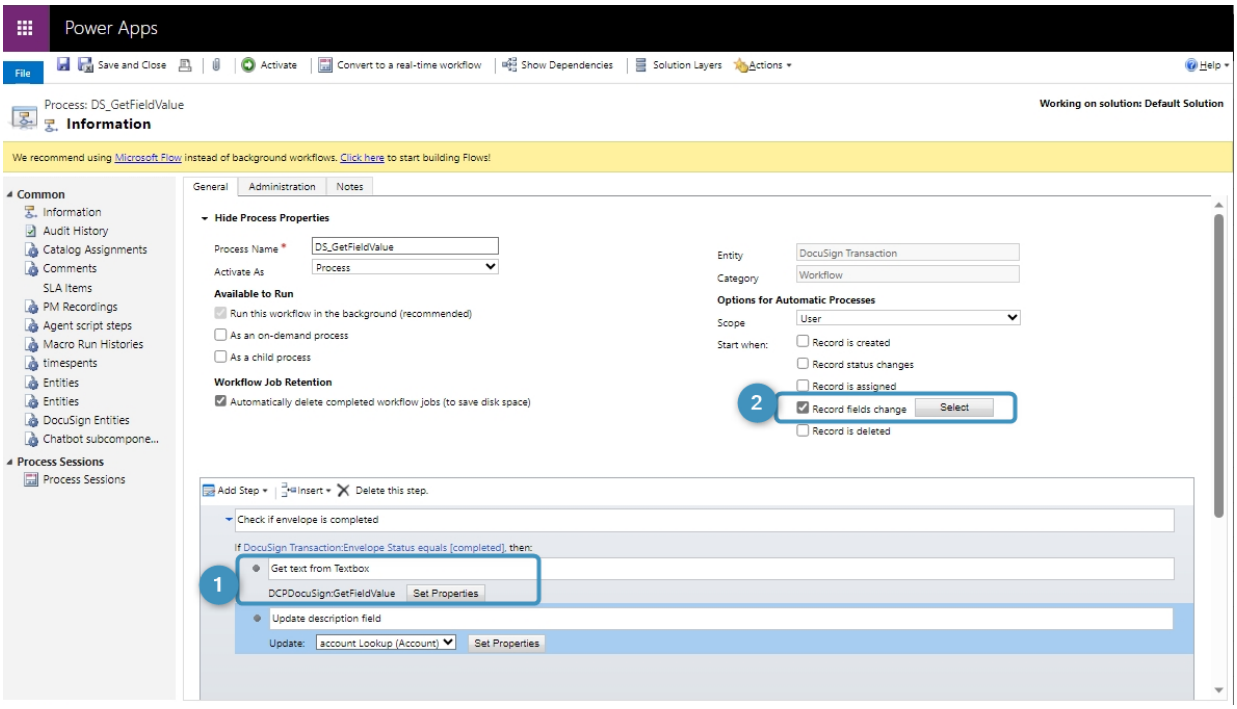


Figure 54: DocuSign GetFieldValue example

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. How to activate the DocuSign SMS Authentication for DocumentsCorePack

SMS authentication is a standard procedure in signing, registration, and payment processes. An SMS is sent to the mobile phone number stored in the DocuSign envelope. This combination of something you know (password) and something you have (your mobile phone) provides security against unauthorized access which is a necessary security factor in signing processes.

Step 1: Create a new settings key with the following values:

Product: AutoMerge
Name: DocuSignSMSAuthentification
Value: true

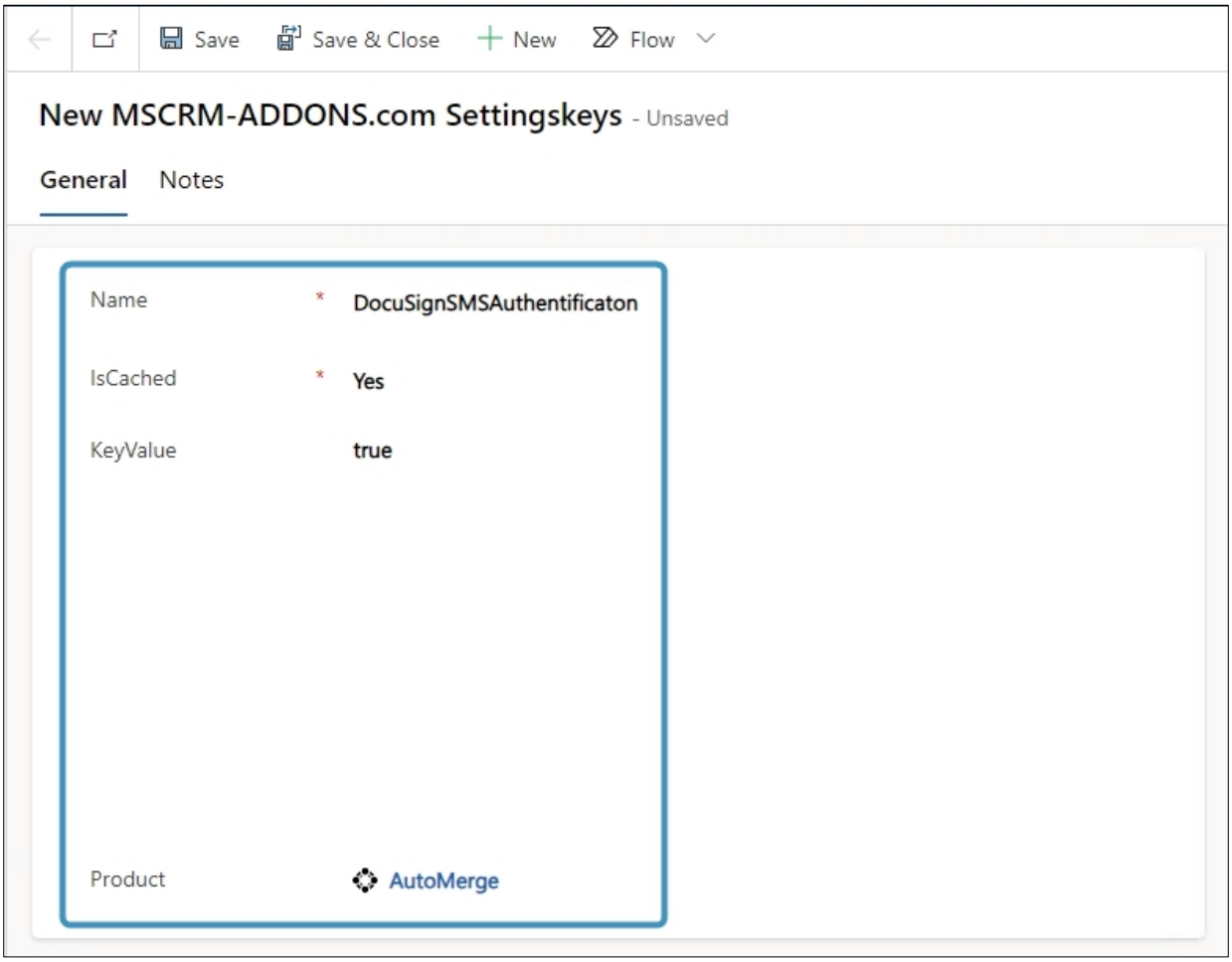


Figure 55: Create Settingskey

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Step 2: After performing these steps, you will have the option to define and set up the SMS Authentication in the One-Click-Action (OCA) Configuration. The SMS authentication can be used only with an OCA. Existing OCAs need to be modified to enable the SMS authentication.

That concludes the steps to install, set up and enable SMS authentication.



Figure 56: SMS Authentication in OCA-Configuration

Step 3: If you have configured your OCA accordingly, you will see the following additional dropdowns while running the OCA.

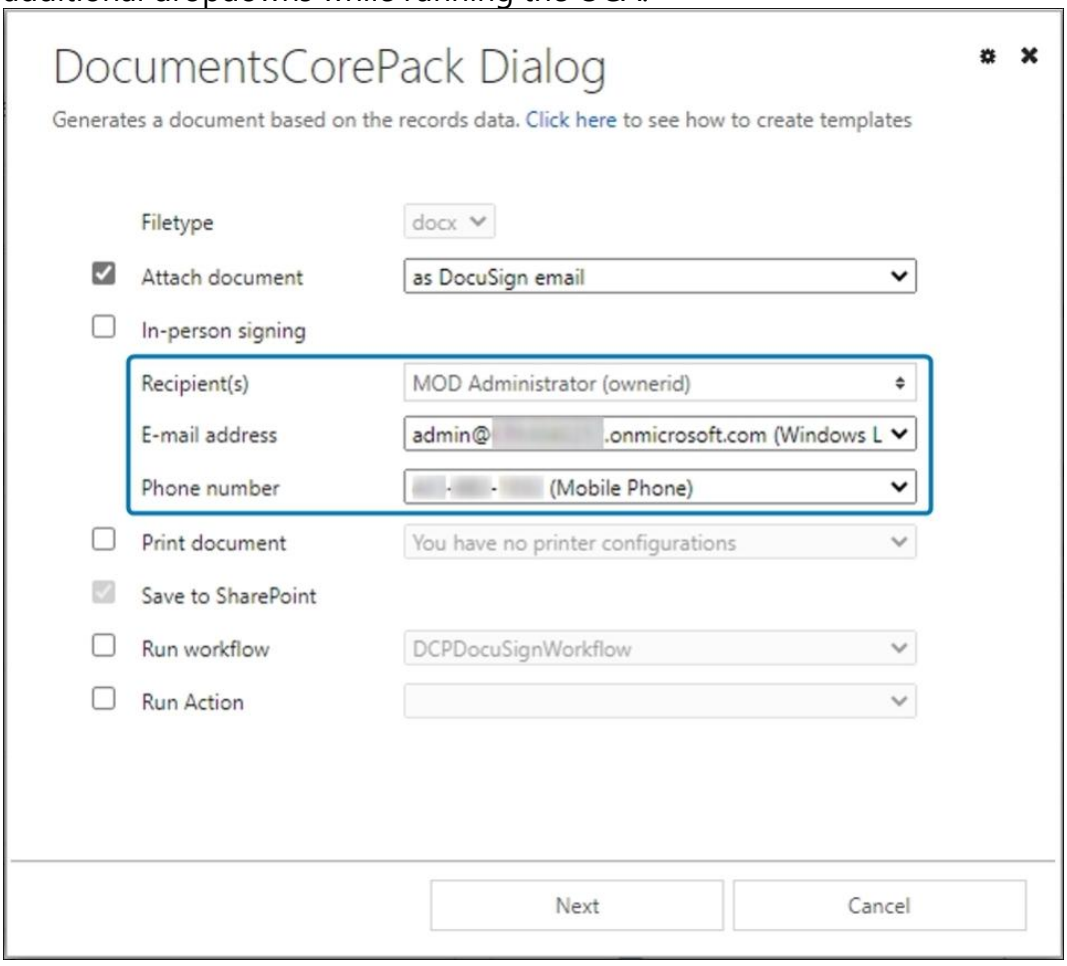


Figure 57: Additional drop-down while running the OCA

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Please note: Be aware that that the SMS Authentication does not work if the sender and recipient are the same. For example, if the DocuSign user is usera@demo.com and the recipient is also usera@demo.com. This is very important to consider while testing.

7.1. How to define phone fields

You can also define Phone fields for an OCA. It is possible to define which phone fields are selectable or if a record type (e.g.: User) doesn't need to authenticate with SMS. The configuration for this can be opened by clicking on **Open** next to **Email Recipient Address Fields**.

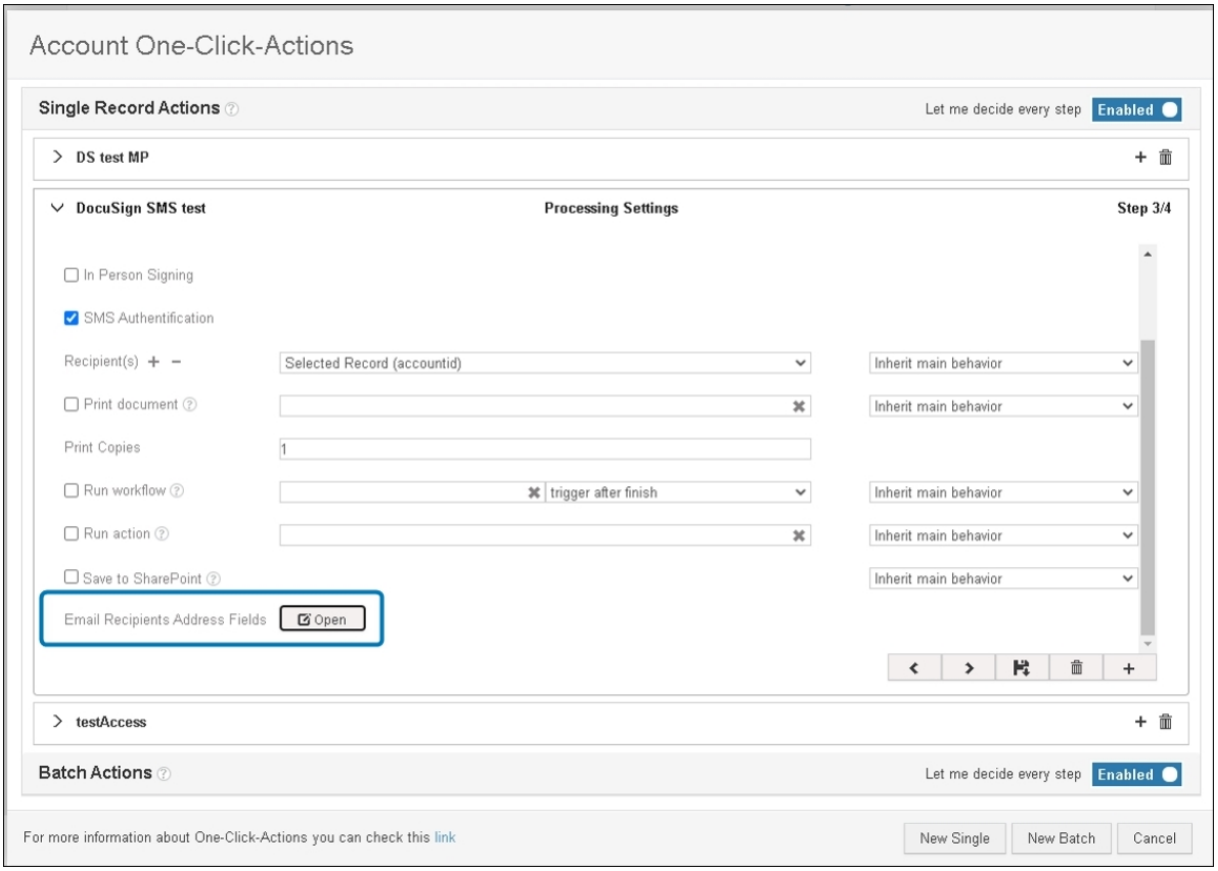


Figure 58: Define phone fields in OCA

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First click on the **New** button and select the entity type, such as Account or User. Then click in the Phone Field and select which Phone fields are selectable in the dialog. You can check the **None** item in case a recipient, for example a user, is not required to authenticate with SMS.

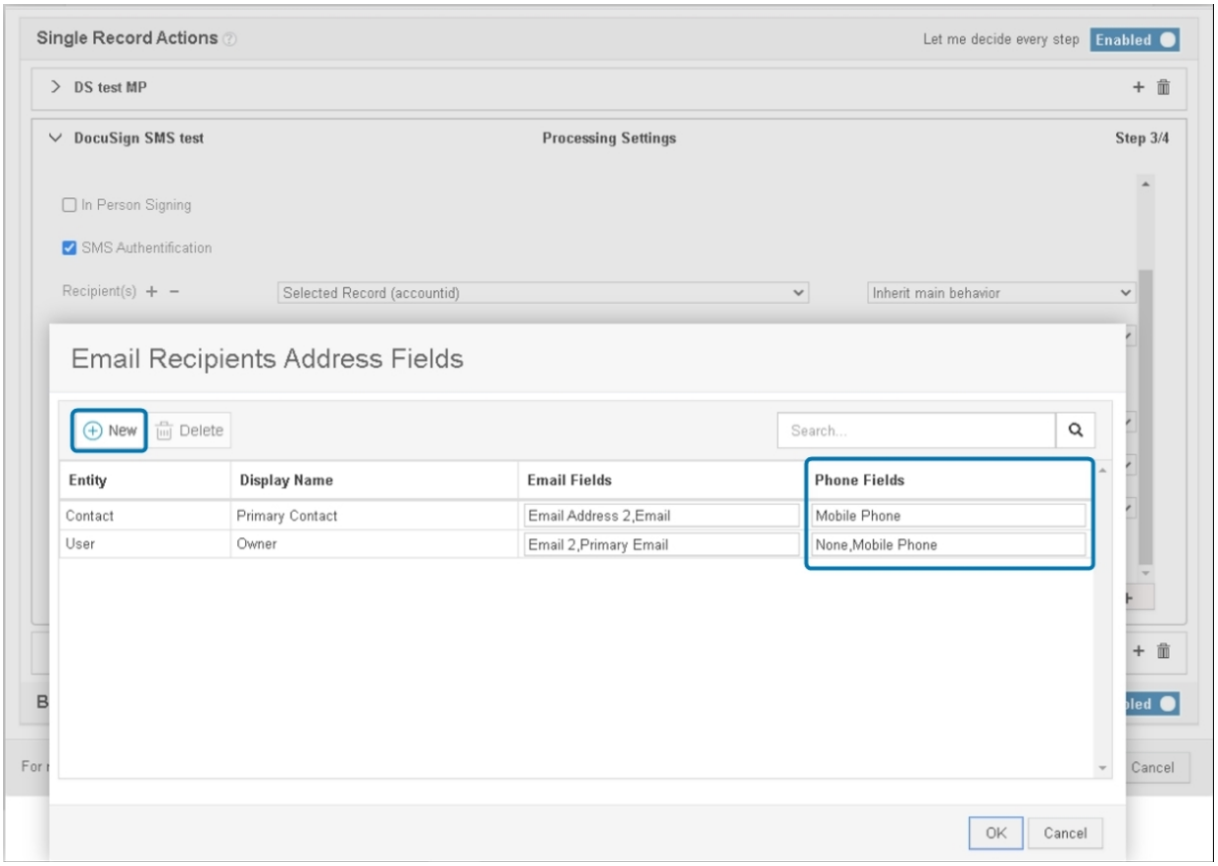


Figure 59: Select, which phone fields are selectable

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