

# e-Signature Adobe Sign User Guide for Microsoft Dynamics 365

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

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## Preamble

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



e-Signatures require the installation of DocumentsCorePack. For further information on DocumentsCorePack, have a look at our <u>documentation</u> on DocumentsCorePack or get your free trial version of the product <u>here</u>.

## **Target Audience**

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

• Basic Microsoft Dynamics 365 knowledge

## Supported Web Browsers and versions

Supported Web Browsers:

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

One of the following versions of Microsoft Dynamics 365 must be available:

- Microsoft Dynamics 365 OnPremise
- Microsoft Dynamics 365 Online

## The purpose of e-Signatures?

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

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

# Optional DocumentsCorePack Feature: Adobe Sign

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

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

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

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

For more Information about how to install and set up Adobe Sign for Dynamics 365 please follow the <u>Installation Guide</u> written by Adobe.

## 1 How to work with Adobe Sign in DocumentsCorePack

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

### 1.1 Obtaining the Adobe Sign package

Please find the current Adobe Sign for Microsoft Dynamics 365 **Online** package on <u>AppSource</u>. The Adobe Sign for Microsoft **On-Premises** package can be downloaded from the <u>Adobe Sign</u> <u>Integration page</u>. On this page, you will also be able to review release notes, known issues and additional install/user guide information.

#### 1.2 Installing the Adobe Sign package

The installation of Adobe Sign is very easy, please just follow the Installation Guide written by Adobe.

## 1.3 Adobe Sign Users and Security Roles

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

#### Adobe Sign Reader

Users have read-only access to Agreement records.

#### Adobe Sign User

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

#### ADOBE SIGN ADMINISTRATOR

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

# PLEASE NOTE

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

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

## 1.4 AdobeSign Impersonation options

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

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

DCP Server-based Version 2020.95	mscrm-addons.com DocumentsCorePack for Dynamics 365
★ Get Started  General Settings  One-Click-Actions  L	License Server License Client G About
PDF/A Compliance ③	Disabled
Template Selection Column Configuration ⑦	Add Setting
Use DCP Lookup Dialog 🚰 😨	Disabled
Dialog Settings	+
SharePoint Settings     Advanced Settings     Adobe Sign Impersonation Enabled ②	+ - Enabled
Async Print Jobs ③	Add Setting
Debug Max Length ③	Add Setting
Don't show following Entities ⑦	Change
SP Webservice Url ②	no
Use Alternative Pushlogic ⑦	Disabled
Use Alternative Pushlogic Only For Printjobs ⑦	Disabled
H Sa	Please do not forget to save your pending changes

Figure 1: Adobe Sign Impersonation Enabled

## 2 DocumentsCorePack templates for Adobe Sign

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

#### 2.1 How to create a DocumentsCorePack template for AdobeSign

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

Please find all the information about how to use the Template Designer in the <u>Template Designer User</u> <u>Guide</u> on our website.

#### 2.2 Adobe Sign text tags

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

Please find all possible Adobe Sign text tags in the Adobe Sign Text Tag Guide.

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

< <msdyn_serviceaccount_address1_ine1>&gt;         <msdyn_serviceaccount_address1_city>&gt;,         <msdyn_serviceaccount_address1_country>&gt;         Service Description: &lt;<msdyn_primaryincidentdescription>&gt;         Products:         Product       Qty       Amount         <msdyn_name>&gt;       <msdyn_untity>&gt;       <msdyn_totalamount>&gt;         Subtotal:       <msdyn_totalamount>&gt;       <msdyn_totalamount>&gt;         Subtotal:       <msdyn_untity>&gt;       <msdyn_totalamount>&gt;         Subtotal:       <msdyn_totalamount>&gt;       <msdyn_totalamount>&gt;         Subtotal:       <msdyn_totalamount>&gt;       <msdyn_totalamount>&gt;         Subtotal:       <msdyn_totalamount>&gt;       <msdyn_totalamount>&gt;         Tax:       <msdyn_totalamount>&gt;       <msdyn_totalamount>&gt;         farks:        <msdyn_totalamount>&gt;         Task       <msdyn_estimatedduration>&gt;       <msdyn_actualduration>&gt;         signatures:        <msdyn_estimatedduration>&gt;       <msdyn_actualduration>&gt;         signatures:         <msdyn_estimatedduration>&gt;       <msdyn_actualduration>&gt;</msdyn_actualduration></msdyn_estimatedduration></msdyn_actualduration></msdyn_estimatedduration></msdyn_actualduration></msdyn_estimatedduration></msdyn_totalamount></msdyn_totalamount></msdyn_totalamount></msdyn_totalamount></msdyn_totalamount></msdyn_totalamount></msdyn_totalamount></msdyn_totalamount></msdyn_totalamount></msdyn_totalamount></msdyn_untity></msdyn_totalamount></msdyn_totalamount></msdyn_totalamount></msdyn_untity></msdyn_name></msdyn_primaryincidentdescription></msdyn_serviceaccount_address1_country></msdyn_serviceaccount_address1_city></msdyn_serviceaccount_address1_ine1>	mscrm-addoi	ns.com		()	MSCrm-addons.cc
<pre>c<msdyn_workordertype_msdyn_name>&gt; Customer: <msdyn_serviceaccount_address1_line1>&gt;</msdyn_serviceaccount_address1_line1></msdyn_workordertype_msdyn_name></pre>					
<pre></pre> </td <td></td> <td>• =</td> <td>ame&gt;&gt;</td> <td></td> <td>Туре:</td>		• =	ame>>		Туре:
<pre>&lt;<msdyn_serviceaccount_address1_city>&gt;, &lt;<msdyn_serviceaccount_address1_country>&gt; servicea Count_address1_country&gt;&gt; servicea Description: &lt;<msdyn_primaryincident description="">&gt; Products: Product <a href="https://www.subtolalamount/">www.subtolalamount/</a> Subtotal: <a href="https://www.subtolalamount/"></a> Tax: &lt;</msdyn_primaryincident></msdyn_serviceaccount_address1_country></msdyn_serviceaccount_address1_city></pre>	Customer:	< <msdyn_serviceacco< td=""><td>ount_name&gt;&gt;</td><td>•</td><td></td></msdyn_serviceacco<>	ount_name>>	•	
Products: Product Consider the second sec	< <msdyn_ser< th=""><th>viceaccount_address1_</th><th>ount_address postalcode&gt;&gt;</th><th>1_city&gt;&gt;,</th><th></th></msdyn_ser<>	viceaccount_address1_	ount_address postalcode>>	1_city>>,	
<pre>&lt;<msdyn name="">&gt; </msdyn></pre> <amsdyn name="">&gt;  <amsdyn auntity="">&gt; </amsdyn>&gt; </amsdyn> <th>Service Desc Products:</th> <th>r<b>iption:</b> &lt;<msdyn_prima< th=""><th>ryincidentde</th><th>scription&gt;&gt;</th><th></th></msdyn_prima<></th>	Service Desc Products:	r <b>iption:</b> < <msdyn_prima< th=""><th>ryincidentde</th><th>scription&gt;&gt;</th><th></th></msdyn_prima<>	ryincidentde	scription>>	
Subtotal: <pre> Subtotal: </pre> Tax: <pre> Subtotal: </pre> Total Amount:  TaxA <pre> Subtotal: </pre> TaxA <pre> Subtotal: </pre> Subtotal:  Subtotal: <pre> Subtotal: </pre> Subtotal:  Subtotal:  Subtotal:  Subtotal: <pre> Subtotal: </pre> Subtot: <pre> Subtotal: </pre> Subtotal:	Product				
Tax:       < <msdyn_totalsalestax>&gt;         Total Amount:       &lt;<msdyn_totalsalestax>&gt;         Total Amount:       &lt;<msdyn_totalsalestax>&gt;         Tasks:      </msdyn_totalsalestax></msdyn_totalsalestax></msdyn_totalsalestax>	< <msdyn n<="" td=""><td>ame&gt;&gt;</td><td></td><td></td><td></td></msdyn>	ame>>			
Total Amount:       < <msdyn_totalamount>&gt;         Image: Image</msdyn_totalamount>					
Task: Task Est. Duration (min) Actual Duration (min) <msdyn name="">&gt; <msdyn estimatedduration="">&gt; <msdyn actualduration="">&gt; <msdyn< td=""><td></td><td></td><td></td><td></td><td></td></msdyn<></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn></msdyn>					
< <pre>&lt;<msdyn name="">&gt; </msdyn></pre> </th <th>Tasks:</th> <th></th> <th></th> <th>1</th> <th>{{Int_es_:signer1:initials}}</th>	Tasks:			1	{{Int_es_:signer1:initials}}
< <pre>&lt;<msdyn name="">&gt; </msdyn></pre> </td <td>Tack</td> <td></td> <td>7</td> <td>Est Duration (min)</td> <td>Actual Duration (min)</td>	Tack		7	Est Duration (min)	Actual Duration (min)
{{Int_es_:signer1:initials}} Signatures: {{Sig_es_:signer1:signature}} Approved by:		ame>>	< <msdvn e<="" td=""><td></td><td></td></msdvn>		
Approved by:	Signatures:				{{Int_es_:signer1:initials}}
approved by:	{{Sig_es_:sig	ner1:signature}}			
{Sig. es :signer2:signature}}	Approved by		2		

Figure 2: DCP template with two signees

## 2.3 Template Settings

Open the "eSign Settings" and set following properties for "AdobeSign":

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

Learn more about creating a AdobeSign Data Mapping template.

In eSign Settings select the created DataMapping template:

Template Settings		-		×
Template Settings	eSign Settings			
Document Name and Subject	AdobeSign properties			
General	Select Data Mapping		~	
Create Activities For	Set sign order		~	
Document Protection	Set Signing Language	9	~	
Sub Folder			_	
Client Automation Settings				
Client Automation				
E-Mail (Create Activity)				
Advanced Settings				
Additional Fields				
Sharepoint Metadata				
Remove Watermark				
Debugging				
Prompts				
Section Configuration				
Electronic Signature				
		ОК	Can	cel

Figure 3: eSign settings

## 3 Tutorials ("How To's")

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

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

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

mscrm-addor	is.com	Your co	rm- <b>addons</b> mpany for MS-CRM A
Work Order:	00001	Type: Delivery	
Customer:	Fourth Coffee		
	Carrera 1b No 10-01 Bogota, Columbia		
Service Descr	iption: Printer setup and configura	ition	
Products:			
Product		Qty	Amount
	t 3D Printer 4" ing Fan for 3D printer	2.00 3.00	\$1,000.00 \$177.00
backup COOI	ing rain or so printer	3.00 Subto	
		Tax	
	oe Sign Test Doo	cument 🖉	
	commercial use	ument •	ual Duration (min)
Not for	commercial use	ument •	ual Duration (min) 45 150
Not for Task Setup	commercial use	Est. Duration (min) Act	45
Not for Task Setup Configuratio	commercial use	Est. Duration (min) Act 60 150	45
Not for Task Setup Configuratio	commercial use	Est. Duration (min) Act 60 150	45
Not for Task Setup Configuratio	n	Est. Duration (min) Act 60 150	45
Not for Task Setup Configuratio	n	Est. Duration (min) Act 60 150	45
Not for Task Setup Configuratio Signatures: Codeptor Kianca Approved by:	n	Est. Duration (min) Act 60 150	45
Not for Task Setup Configuratio Signatures: Codeptor Kianca Approved by:	n	Est. Duration (min) Act 60 150	45
Not for Task Setup Configuratio Signatures: Codeptor Kianca Approved by:	n	Est. Duration (min) Act 60 150	45

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

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

Search	Search for templates Se	earch	
Name		Category	Group
Test_pat.c	locx		General
WorkOrd	er_Template.docx		General
WorkOrd	er_Template_2signees.docx		General

*Figure 5: DCP Dialog – select your template* 

Here, please select the template you want to execute – in this case we want a document with two signees to be signed, so please select the *WorkOrder\_Template\_2signees.docx*.

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

	cumentsCoreP es a document based on the	Pack Dialog records data. Click here to see how to create templates
	Filetype	docx *
st.	Attach document	as Adobe Sign email
	In-person signing	
	Recipient(s)	Litware, Inc. (sample) (msdyn_billingaccount)
	E-mail address	bianca.codospan@mscrm-addons.com (Email)
	Recipient(s) 2	Fourth Coffee (msdyn_serviceaccount)
	E-mail address 2	michael.dohr@outlook.com (Email)
	Print document	Brother Printer 🔻
	Save to SharePoint	
	Run workflow	You have no workflows
Sa	ave Config	3 Next Cancel

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

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

DocumentsCorePack Dialog Generates a document based on the records data. Click here to see how to	X create templates
Here you have the possibility to preview your document.	Edit 👻
Click finish to proceed with the following steps - Attach as Adobe Sign email	
Finish	Cancel

Figure 7: DCP Dialog – Preview document

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

Preview - 00001 - F	ourth Coffee - Confirm	ation	
mscrm-addo	ns.com		mscrm- <b>addons.</b> com Your company for MS-CRM ADD-ONSI
Work Order:	00001	Type: Delivery	
Customer:	Fourth Coffee		
	Carrera 1b No 10-01 Bogota, Columbia		
Service Desc	ription: Printer setup and configurat	ion	
Products:			
Product		Qty	Amount
	nt 3D Printer 4" ling Fan for 3D printer	2.00	\$1,000.00 \$177.00
Backup COO	ingran for 30 printer	5.00	Subtotal: \$1,177.00
			Tax: \$47.08
			Total Amount: \$1,224.08
			{{Int_es_:signer1:initials}}
Tasks:			
Task		Est. Duration (min)	Actual Duration (min)
Setup		60	
Configuratio	n	150	150
		[	{{Int_es_:signer1:initials}}
Signatures:			
{{Sig_es_:sig	ner1:signature}}		
Approved by	Figure	8: Preview of you	ur document
{{Sig_es_:sig	ner2:signature}}	o. Treview of you	

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

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





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

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

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

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

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

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

			1	
Work Order:	00001	Type: Delivery		
Customer:	Fourth Coffee			
	Carrera 1b No 10-01 Bogota, Columbia			
Service Descr	ription: Printer setup and conf	figuration		
Products:				
Product		Qty		Amount
	nt 3D Printer 4"	2.00		\$1,000.00
Backup Coo	ling Fan for 3D printer	3.00	Subtotal: Tax: Total Amount	\$177.00 \$1,177.00 \$47.08 :: \$1,224.08
	be Sign Test D	ocument	Tottak	
Task		Est. Duration (mir	n) Actual Dur	ration (min)
Task			0	45
Setup		6		
	on	6 15		150
Setup	n			
Setup	n		o	
Setup Configuratio	n		o	
Setup Configuratio Signatures:			o	
Setup Configuratio Signatures:			o	

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

Num allmun Maria della constanti d	You have successfully signed the agreement "[DEMO USE ONLY] 00001 - Fourth Coffee -
Sanda Mandellan Yoor sha and andreanna Manter Manter Manter Martin Manter Man Manter Manter Ma Manter Manter Mante	Confirmation".
Adobe Sign Test Document Mit for connectif use Man State S	It has now been sent to michael.dohr@outlook.com to sign.
Newton: ingenter: Agenetic	Download a copy
1Page	Sign up for a free trial

Figure 11: Document successfully signed - message

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

Adobe Sign	
ncon address car Mach datase Mach datase	[DEMO USE O Fourth Coffee Confirmation mscrm-addon Codospan Bia Michael Dohr Filed!
Attack         Op         Autom           Million         300         300         300           Markar Config for for 30 points         300         300         300           Markar Config for for 30 points         500         500         500           Markar Markar         500         500         500         500           Markar         500         500         500         500         500           Markar         500         50	From: Michael Dohr (msc To: Codospan Bianca, Mich
Tea En Dordina (2001) - And Dordina (2001) - Configuration (2001) - Configu	Attached is a final copy of Fourth Coffee - Confirma
anges files. Auronel for athletiti-	Copies have been automat the agreement.
	You can view the document account.
117 age	Why use Adobe Sign:
	• Exchange, Sign, and File

NLY] 00001 -<u>- e</u> between s.com Corp., nca and is Signed and

rm-addons.com Corp.) nael Dohr and Michael Dohr

[DEMO USE ONLY] 00001 tion.

tically sent to all parties to

nt in your Adobe Sign

- e Any Document. In Seconds!
- Set-up Reminders. Instantly Share Copies with Others.
- See All of Your Documents, Anytime, Anywhere. •

Figure 12: E-mail signed document with two signees

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

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

Adobe Sign					SI	gn In	?
[DEMO USE ONLY] 000	01 - Fourth Coffee		🗄 Manage Agreement	Audit Report	🖶 Print	上 PD	F
From: Michael Dohr (mscrm-addo To: Codospan Bianca (bianca.codo: addons.com), Michael Dohr (micha Date: 01/28/2019, 10:48 AM Status: Signed Message: none	span@mscrm-	<ul> <li>Sent out for signature to Co Bianca (bianca.codospan@r addons.com) Jan 28, 10:14 A</li> <li>Viewed by Codospan Bianc (bianca.codospan@mscrm- addons.com) Jan 28, 10:15 A</li> <li>Document e-signed by Cod</li> </ul>	nscrm- M a M				•
	ABS Filament 3D Pr Backup Cooling Fan	for 3D printer	1.00	Amount \$1,000.00 \$177.00 \$1,177.00 \$47.08 unt: \$1,224.08			
	1						
	Task Setup	Es	t. Duration (min) Actual 60	Duration (min) 45			- 18
	Configuration		150 <u>MD</u>	150			I
	Signatures: Colopar Biana	3					ļ
	Approved by: Michael Debr						Ţ

Figure 13: The signed document ready for download

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

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

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

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

mscrm-addons.com	Your com	m-addons
Work Order: 00001	Type: Delivery	
Customer: Fourth Coffee		
Carrera 1b No 10-01		
Bogota,		
Columbia		
Service Description: Printer setup and configur	ation	
Products:		
Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00 Subtota	\$177.00 l: \$1,177.0
	Tax:	\$47.0
	Total Ar	nount: \$1,224.0
Adobe Sign Test Do		al Duration (min)
Not for commercial use Task Setup	Est. Duration (min) Actu	al Duration (min) 45
Not for commercial use	Est. Duration (min) Actu	
Not for commercial use Task Setup	Est. Duration (min) Actu	45
Not for commercial use Task Setup Configuration	Est. Duration (min) Actu 60 150	45
Not for commercial use Task Setup Configuration Signatures:	Est. Duration (min) Actu 60 150	45
Not for commercial use Task Setup Configuration	Est. Duration (min) Actu 60 150	45
Not for commercial use Task Setup Configuration Signatures:	Est. Duration (min) Actu 60 150	45
Not for commercial use Task Setup Configuration Signatures:	Est. Duration (min) Actu 60 150	45
Not for commercial use Task Setup Configuration Signatures:	Est. Duration (min) Actu 60 150	45
Not for commercial use Task Setup Configuration Signatures:	Est. Duration (min) Actu 60 150	45
Not for commercial use Task Setup Configuration Signatures:	Est. Duration (min) Actu 60 150	45
Not for commercial use Task Setup Configuration Signatures:	Est. Duration (min) Actu 60 150	45
Not for commercial use Task Setup Configuration Signatures:	Est. Duration (min) Actu 60 150	45
Not for commercial use Task Setup Configuration Signatures:	Est. Duration (min) Actu 60 150	45

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

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

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

Figure 15: DCP Dialog – select template

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

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

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

	Filetype	docx 🔻	
4	Attach document	as Adobe Sign email	
	In-person signing		
	Recipient(s)	Litware, Inc. (sample) (msdyn_billingaccount)	
	E-mail address	bianca.codospan@mscrm-addons.com (Email)	
	Print document	Brother Printer	
	Save to SharePoint		
	Run workflow	You have no workflows	

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

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

DocumentsCorePack Dia Generates a document based on the records data. Cli	0	<b>x</b> reate templates
Here you have the possibility to preview your docum	ent.	
00001 - Fourth Coffee - Confirmation		Edit 🔻
Click finish to proceed with the following steps - Attach as Adobe Sign email		
	Finish	Cancel

*Figure 17: DCP Dialog – Preview or edit document* 

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

Senerates a document based on the records data. Click here to see how to create templates
Please click on the signees to complete the document signing
- Litware, Inc. (sample) (bianca.codospan@mscrm-addons.com)
Finish Close

Figure 18: DCP Dialog – complete the document signing

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

Adobe Sign	
merre address com	Michael Dohr Has Sent You [DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation to Sign
Addi Hammed 10 Product 4"     2.00     \$1,000.00       Backup Cauling Yan for Dirynderr     3.00     \$1,77.00       Sathanal:     \$1,177.00       Texture     \$1,000.00       Sathanal:     \$1,177.00       Sathanal:     \$1,177.00       Sathanal:     \$1,214.00       Not for commercial use     \$1,214.00       Sathanal:     \$1,214.00       Sathanal:     \$1,214.00       Not for commercial use     \$1,214.00       Sathanal:     \$1,000       Sathanal:     \$1,000       Sathanal:     \$1,000	Click here to review and sign [DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation. After you sign [DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation, all parties will receive a final PDF copy by email.
Spakers	If you need to delegate this document to an authorized party for signature, <b>please do not forward this email</b> . Instead, click here to delegate.

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

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

	s.com	Your co	mpany for MS-CRM
Work Order: 0	00001	Type: Delivery	
Customer:	Fourth Coffee		
	Carrera 1b No 10-01		
	Bogota,		
	Columbia		
Service Descri	ption: Printer setup and configurati	on	
Products:			
Product		Qty	Amoun
	t 3D Printer 4"	2.00	\$1,000.0
Backup Cooli	ng Fan for 3D printer	3.00 Subto	\$177.0 tal: \$1,177.0
		Tax	
		Total 4	Amount: \$1,224.
1 Task	commercial use		ual Duration (min
1 Task Setup		60	4
1 Task		60 150	
1 Task Setup		60	4
1 Task Setup		60 150	4
Task Setup Configuratior		60 150	4
Task Setup Configuration Signatures:		60 150	4

Figure 20: Sign the document

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

nun einen Karl Karl Karl Karl Karl Karl Karl Karl	You have successfully signed the agreement "[DEMO USE ONLY] 00001 - Fourth Coffee -
tanda tanajatan Proz shu a akundipanan Pandari "Antan Tanan Antan An Antan Antan Anta	Confirmation".
Adobe Sign Test Document	Copies will be e-mailed to all parties.
Nama Balata	Download a copy
10-m	Sign up for a free trial

Figure 21: Document successfully signed - message

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

Dynamics 365 Settings - Process	es						Y + C Q
Settings							
Business	Customization	System		Process Center	MSCRM-ADDONS	Application	
Business Manageme Co Sync Error	Customizations	Administration	Email Configuration	Processes	Products	Apps	
Templates	Solutions	Security	Activity Feeds Confi	Microsoft Flows	DocumentsCorePack		
2 Unified Service Desk	Microsoft AppSource	Data Management	Activity Feeds Rules				
Product Catalog	Plug-In Trace Log	System Jobs	Dynamics 365 App f				
Service Management	Solutions History	Document Manage	Sales Insights				
Mobile Offline		Auditing					

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

Figure 22: Dynamics 365 > Settings > Processes

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

+ N	IEW	🟛 DELETE 🛛 🔹 EMAIL A LINK 🖾 🗸 🖉 FLOW	🔹 🔩 EXPORT TO EXCEL 🕴 👻	電 VIEW 🛛 🗔 NEW SYSTEM VIEW		Y 🔅 SYSTEM VIEWS
	卭	My Processes 👻				
		Process Name ↑	Category	Primary Entity	Status Cr	eated On   Modified On
		Auto Response Email for Case	Workflow	Case	Activated 9/	6/2021 11: 9/6/2021 11:
		MSCRM-ADDONS.com LicensekeyUpdate	Workflow	MSCRM-ADDONS.com Setting	Activated 10	/29/2021 1 10/29/2021 1
		MSCRM-ADDONS.com Scheduler	Workflow	MSCRM-ADDONS.com Schedu	Draft 10	/29/2021 1 10/29/2021 1
		MSCRM-ADDONS.com Scheduler Generator	Workflow	MSCRM-ADDONS.com Products	Draft 10	/29/2021 1 10/29/2021 1
		MSCRM-ADDONS.com Scheduler Helper	Workflow	MSCRM-ADDONS.com Schedu	Activated 10	/29/2021 1 10/29/2021 1

Figure 23: Add new process

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

Create Process Define a new process actions, dialogs, and	ss, or create one from an existing template. I workflows.	/ou can create four kir	nds of processes: busine	ess process flows,
Process name: *	SendWithAdobe			
Category: *	Workflow 🗸	Entity: *	Account	~
🗹 Run this workfic	ow in the background (recommended)			
We recommend usir	ng <u>Microsoft Flow</u> instead of background we	orkflows. <u>Click here</u> to	start building Flows!	
Туре:	New blank process New process from an existing templa	te (select from list):		
Template	e Name 🛧	Primary En	tity	Owne
				~ *
4				•
Properties				
			ОК	Cancel

Figure 24: Create process

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

Process: SendWithAdobe - Mice	rosoft Dynamics 365 - Go	ogle Chrome				- 🗆 X
erg83c366ef.crm.dynamic	s.com/sfa/workflow/	edit.aspx?id=%7b04959420-1602-41	D9-9CDC-E2D76023212	6%7d		
Power Apps						
File	🖹   🛛   🔘 Activa	te Convert to a real-time workflow	Show Dependencies	Solution Layer	s 🎪 <u>A</u> ctions 🕶	@ <u>H</u> elp <del>•</del>
Process: SendWithAdobe					Wo	orking on solution: Default Solution
We recommend using Microsoft Flow	instead of background wo	rkflows. <u>Click here</u> to start building Flows!				
⊿ Common	General Administration Notes					
<ul> <li>➡ Information</li> <li>➡ Audit History</li> </ul>	Hide Process Properties					Â
Catalog Assignments	Process Name *	SendWithAdobe		Entity	Account	
PM Recordings Agent script steps	Activate As	Process 🗸		Category	Workflow	
Macro Run Histories	Available to Run  Run this workflow in the background (recommended)  As an on-demand process			Options for Auto	matic Processes	
Entities				scope (	User	~
La Entities	As a child proce			Store Writeri	Record is created	
DocuSign Entities Comments	Workflow Job Ret				Record status changes	
Chatbot subcompone	Automatically delete completed workflow jobs (to save disk space)		ace)		Record is assigned	
4 Process Sessions					Record fields change Select	
Process Sessions				l	_) Kecora is deleted	
	Add Step -	nsert 🗸 🗙 Delete this step.				
	Stage					
	Check Conditio	n				
	Conditional Bra	nch				
	Default Action					
	Wait Condition					
	Parallel Wait Bra	anch				
	Create Record					
	Update Record					
Status: Draft	Assign Record Send Email	•				
Status, Oldit	Serio Erriali					

Figure 25: Add step

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

Create:	Set Properties 2	
cicate.	Migration tracker	
	Model training details	
	Model-Driven App Component Node	
	Model-Driven App Component Node's Edge	
	Model-Driven App Element	
	Model-Driven App Setting	
	Model-Driven App User Setting	
	MSCRM-ADDONS.com AMTrigger	
	MSCRM-ADDONS.com AutoMergeWorkingItems	
	MSCRM-ADDONS.com Debug	
	MSCRM-ADDONS.com DocumentsCorePack Template	
	MSCRM-ADDONS.com Metadata	
	MSCRM-ADDONS.com OneClickAction	
	MSCRM-ADDONS.com Products	
	MSCRM-ADDONS.com Scheduler	
	MSCRM-ADDONS.com Settingskeys	
	MSCRM-ADDONS.com User/Temp Settings	
	msdyn_msteamssetting	
	msdyn_relationshipinsightsunifiedconfig	
	New Process	-

Figure 26: MSCRM- ADDONS.com AutoMergeWorkingItems

Save and Clos	- 6			
File				02.7
Process: SendWith	Adobe M-ADDONS.com AutoMergeWorkingItems			
Create MSCR	w-ADDONS.com Automergeworkingitems			
General				Form Assistant
Name *	Created by WF	Owner		Dynamic Values 🗸
AutoMergeAction *	CreateDocument ~	PrimaryRecordUri 2	{Record URL(Dynamic)(Account)}	Dynamic Values
Create Document				Operator:
TemplateToExecute	🔓 One Signer Test.docx 🛛 🖾	SaveAs	docx 🗸	Set to V Look for:
CreatedDocument		SaveOnlyIntoTemp	○ No ○ Yes	Account
Concatenate				Record URL(Dynamic)
Document1GUID		UpdateFields	○ No ○ Yes	Add
Document2GUID		OutputFileFormat	· · · · · · · · · · · · · · · · · · ·	X 4 4
CombineType				* 
Attach To Letter				
LetterToAttach		DocumentGUID		Default value:
Attach To Email				
EmailToAttach		DocumentGUID		ок
Attach To Appointmen	nt			
AppointmentToAttach		DocumentGUID		
Attach To Entity				
EntityToAttach (Record		DocumentGUID		
URL(Dynamic))				
Sharepoint URL		Convert to PDF	No Yes	
Delete Sharepoint File Direction	○ No ○ Yes	Save PDF to Sharepoint	○ No ○ Yes	
Send Email	•			
EmailToSend				
Create SharePoint Fol				
	der			1
CreateSharePointFolder	L	CRM Document Location		
Print Document				
Printer		PrintTo PDF (deprecated)		
Copies		PrintTo XPS (deprecated)		• ( )
Sign Document		Cine Manuel		
DocumentGUID 3	Adobe Sign	Sign Name 4	(Account Name(Account))	
sign Provider	Nooce sign	sign Email	(Email(Primary Contact (Contact)))	

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

Figure 27: Set properties

**1** Type in the name of your step and select an AutoMergeAction, in this case *Create Document*.

2 Next, you will have to define the "*PrimaryRecordUrl*". You will first have to click into the field, which will be unfilled at first. Navigate to the "*Form Assistant*" on the right side and open the drop-down menu (below Look for) and select "*Account*". Then open the drop-down menu below and select "*Record URL (Dynamic)*". Click on the **[Add]**-button and it will be added to the field below. You can also define a default value. Finally click the **[OK]**-button and your "*PrimaryRecordUrl*" will be automatically filled with the right URL, marked in yellow.

**3** Scroll down to the Sign document area and do the same as in step 2 to add the DocumentGUID. Select *AdobeSign* as *Sign Provider*.

4 Then type in the Name and e-mail of the recipient.

**Please note:** You can add more than one recipient by using the vertical bar (|) between the Names and the Emails, for example Max Power|John Smith. It is important when your template provides more than one person to sign.

**5** This step starts the main signing workflow. "*Save and Close*" this window.

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

Power Apps				
File	• 🖪   0	O Activate	Convert to a real-time workflow	Show Dependencies
Process: SendWithAdob	oe -			
		15	ows, <u>Click here</u> to start building Flows!	
		ckground workfic Administration	ows, <u>Click here</u> to start building Flows! Notes	
We recommend using <u>Microsoft Fl</u>	General	Administration	Notes	
We recommend using <u>Microsoft Fl</u>	General	15	Notes	

Figure 28: Activate Workflow

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## 5 Contact

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