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Adobe Sign

Adobe Sign Integration in DocumentsCorePack for Microsoft Dynamics 365

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DocumentsCorePack



Powerful document Generation and Processing:

- Simple UI (User-driven Dialog)
- One-Click Actions: simplify and standardize
- Workflow Automation & Scheduler

MS Word Template Designer:

- 1:Many, Many:1 and Many:Many relationships
- Support for multi-level data resolution
- Support for Complex documents (Pictures, images, subdocuments, etc.)



Available on
Microsoft AppSource

<https://bit.ly/2DEQ5Lp>

Adobe Sign



Well known e-Signature provider

Dynamics 365 integration:

- E-Signature support for **all** entities
- Data-Mappings: bi-directional data transfer
- Support for predefined Signature Tags
- Signed document pushed back to Dynamics 365
- Advanced configuration options
 - In-Person signing
 - Sequence
 - Signature type,...



Available on
Microsoft AppSource

<https://bit.ly/2DEF78E>



Adobe Integration: Process Adobe Sign via DocumentsCorePack



How it works

1. Specify e-Signature fields in DCP Templates
2. Specify parameters (signees, type)
 - Signing by Email
 - In Person Signing
3. Trigger AdobeSign process

Advantages:

- Use Complex Documents
- Simple process for users
- Powerful e-Signing capabilities
- Setup independent: DCP will recognize Adobe Sign once configured and provide capabilities.

The screenshot shows the 'DocumentsCorePack Dialog' window, which is used to generate a document based on records data. The dialog includes several configuration options:

- Filetype: docx
- Attach document: as Adobe Sign email
- In-person signing:
- Recipient(s): Fourth Coffee (msdyn_serviceaccount)
- E-mail address: michael.dohr@outlook.com (Email)
- Print document: Brother Printer
- Save to SharePoint:
- Run workflow: You have no workflows

At the bottom of the dialog, there are 'Save Config' and 'Next' buttons. A blue arrow points to the 'Next' button, which is highlighted. Below the dialog, a browser window is open, showing the Adobe Sign interface. The browser address bar displays the URL: <https://secure.eu1.echosign.com/public/esign?aid=CBFCIBAA3AAABLbqZhCVN5QV18Ytz3bYA...>. The page title is '[DEMO USE ONLY] AM_Doc_eccfda1d-78e9-410e-9a...'. The main content area shows the name 'Allie Bellew (Sample Data)' and a signature line labeled 'Signature 1:'. The signature text is 'Adobe Sign Test Document' in red, followed by 'Not for *Click here to sign' in yellow. A 'Start' button is visible in the bottom right corner of the Adobe Sign interface.

Demo & Roadmap

Demo:

- Scenario 1: Send document for signing to multiple signees by email
 - Step-by-Step walkthrough
 - Review setup (template, configuration)
- Scenario 2: Use in-Person signing to sign off a work-order
 - Step-by-Step walkthrough
 - Review setup

Roadmap:

- Support for sequential signing order
- Enable One-Click-Actions
- SharePoint-Upload automation
- Data-Mapping for backward communication via DCP

[DEMO]

[ROADMAP]

Support Information

1. Setup is independent! DCP recognizes Adobe Sign automatically – no extra configuration to do
Get started: <https://www.mscrm-addons.com/Blog/PostId/10187/adobe-sign-for-documentscorepack>
2. DCP Service version **2017.173** required: Currently on USC and EU West only.
3. Signature Tag insertion manually! (not via designer)
https://helpx.adobe.com/sign/help/adobesign_text_tag_guide.html
4. Settingskeys:
5. How Tos:
 1. Standard Signing: <https://www.mscrm-addons.com/Blog/PostId/10188/how-to-merge-a-document-with-adobe-sign-by-e-mail>
 2. In Person Signing: <https://www.mscrm-addons.com/Blog/PostId/10189/how-to-merge-a-document-and-start-an-in-person-signing-process>

Thank You

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- Don't forget we have an awesome blog at <http://www.msrm-addons.com/Blog>, you'll find it to be a helpful resource!

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