Adobe Sign integration in DocumentsCorePack
for Microsoft Dynamcis 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 Adobe Sign 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 Adobe Sign. The tool empowers users to generate and electronically sign documents.

1. Adobe Sign: an additional feature of DocumentsCorePack

Adobe Sign 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.

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

- **Obtain Adobe Sign Package**
- **Install and setup Adobe Sign to work in Dynamics 365**
- **Select the Users to whom you want to grant access**

For more information about installing and setting up Adobe Sign for Dynamics 365, please follow the Installation Guide written by Adobe.

2. How to work with Adobe Sign in DocumentsCorePack

This chapter contains information about how to get started with Adobe Sign in DocumentsCorePack.

2.1. Obtaining the Adobe Sign package

Please find the current Adobe Sign for Microsoft Dynamics 365 Online package on AppSource. The Adobe Sign for Microsoft On-Premises package can be downloaded from the Adobe Sign Integration page. This page also reviews release notes, known issues, and additional install/user guide information.

2.2. Installing the Adobe Sign package

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

2.3. 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 can only see 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 along with those of 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 you to select the option **Attach as Adobe Sign e-mail** if the Dynamics 365 user has **read rights** for the Adobe Sign settings entity (**adobe_integrationsettings**).

2.4. Adobe Sign impersonation options

When you use DocumentsCorePack, the default Adobe Sign 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 Adobe Sign e-mails will be sent on behalf of the Dynamics 365 users. If the option is deactivated, which is the standard setting, the Adobe Sign e-mail is sent on behalf of the Dynamics 365 user of the DocumentsCorePack service.

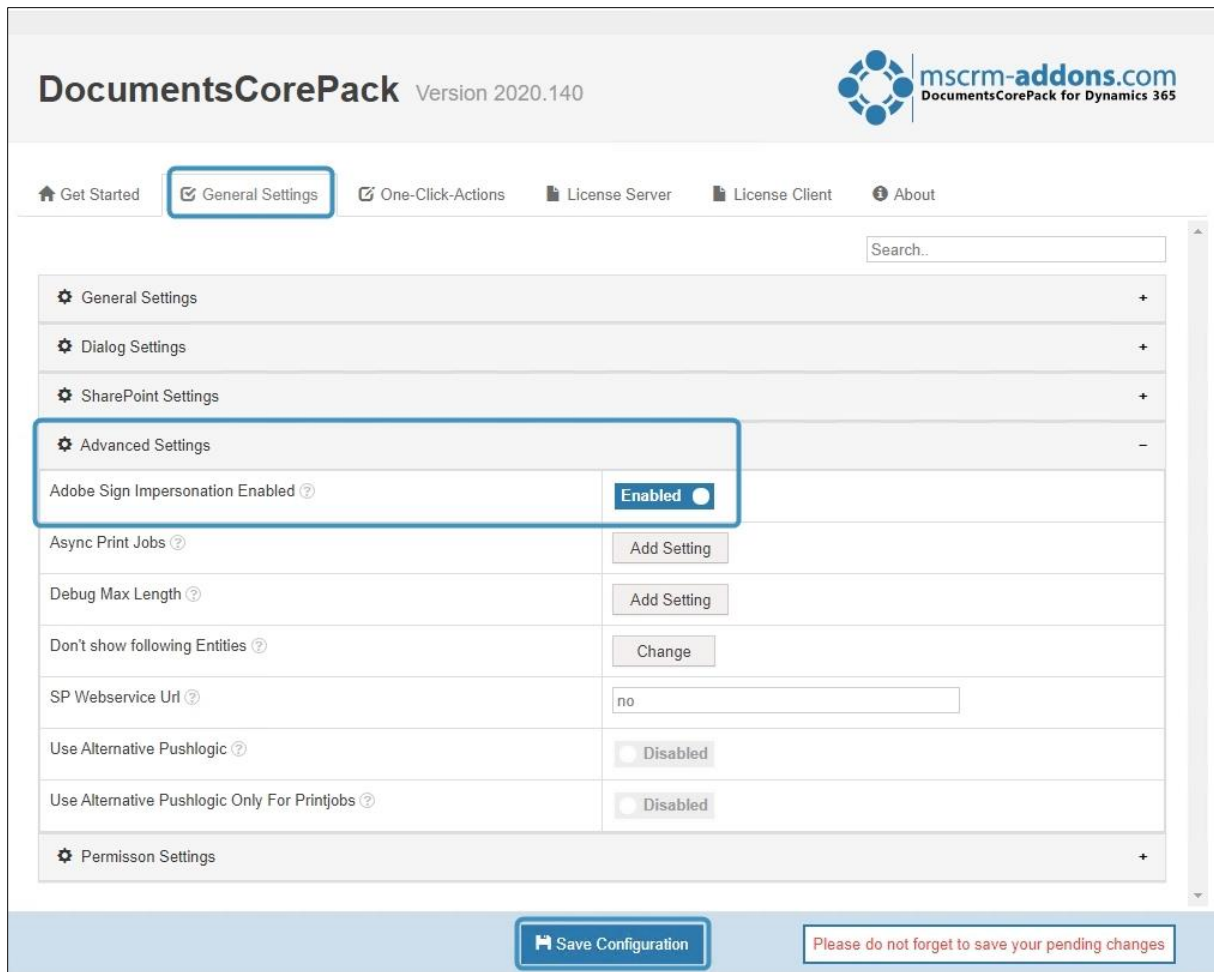Don´t forget to save the configuration!

Figure 1: Adobe Sign Impersonation enabled

3. 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.
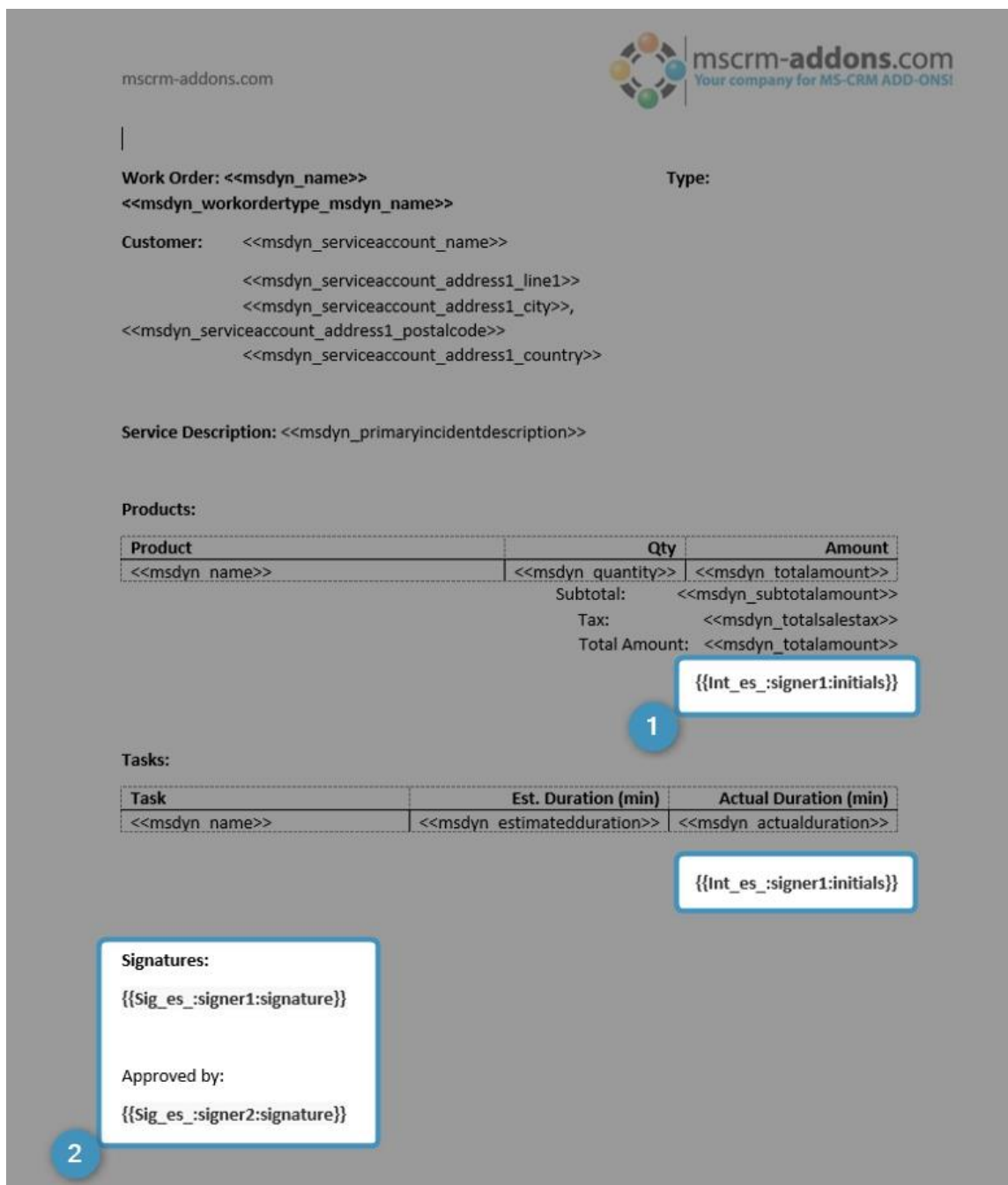
3.1. How to create a DocumentsCorePack Template for Adobe Sign

To insert fields into Microsoft Word documents and form a DocumentsCorePack template, you must use the DocumentsCorePack Template Designer. 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 Adobe Sign. Please find all the information about how to use the Template Designer in the Template Designer User Guide on our website.

3.2.Adobe Sign text tags

To use Adobe Sign in DocumentsCorePack, you have to enter Adobe Sign text tags. These formatted text tags 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.

Figure 2: DocumentsCorePack Template with 2 Signees
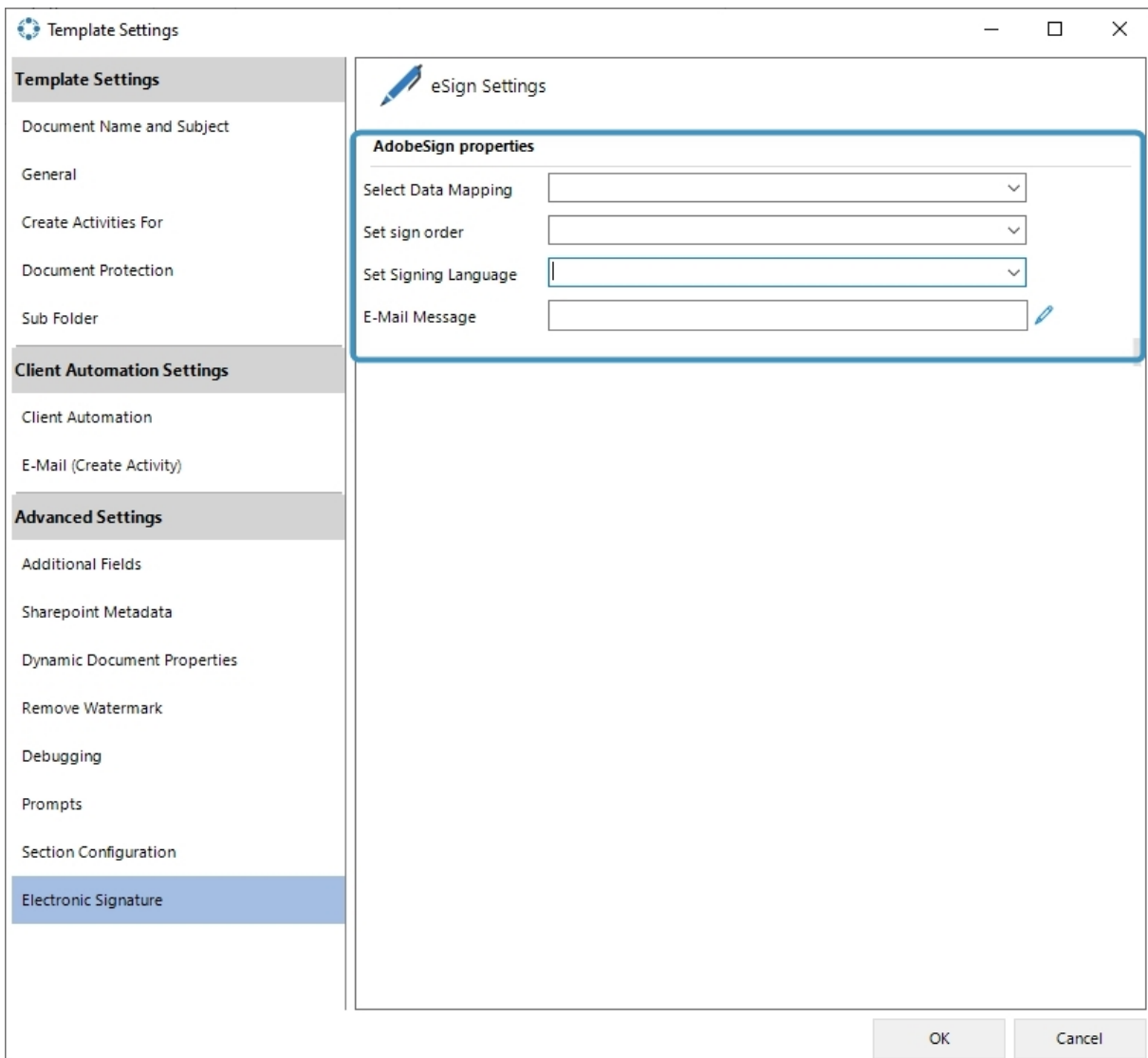
3.3. Template Settings

Open the **eSign Settings** and set the following properties for Adobe Sign:

- DataMapping (The Agreement Mapping Template entity must already be created in Dynamics 365)
- Sign order – choose if the signee should sign the document in any order or in order of adding to the agreement
- Signing language – default language of Agreement
- E-Mail Message – define your message for the AdobeSign e-mail

Learn more about creating an AdobeSign Data Mapping template.

In **eSign Settings**, select the created DataMapping template:

Figure 3: eSign settings

4. Tutorials (How To's)

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

4.1. 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 that has two signees. The document will be sent via e-mail to the two signees to be signed. The result can look like the figure below.
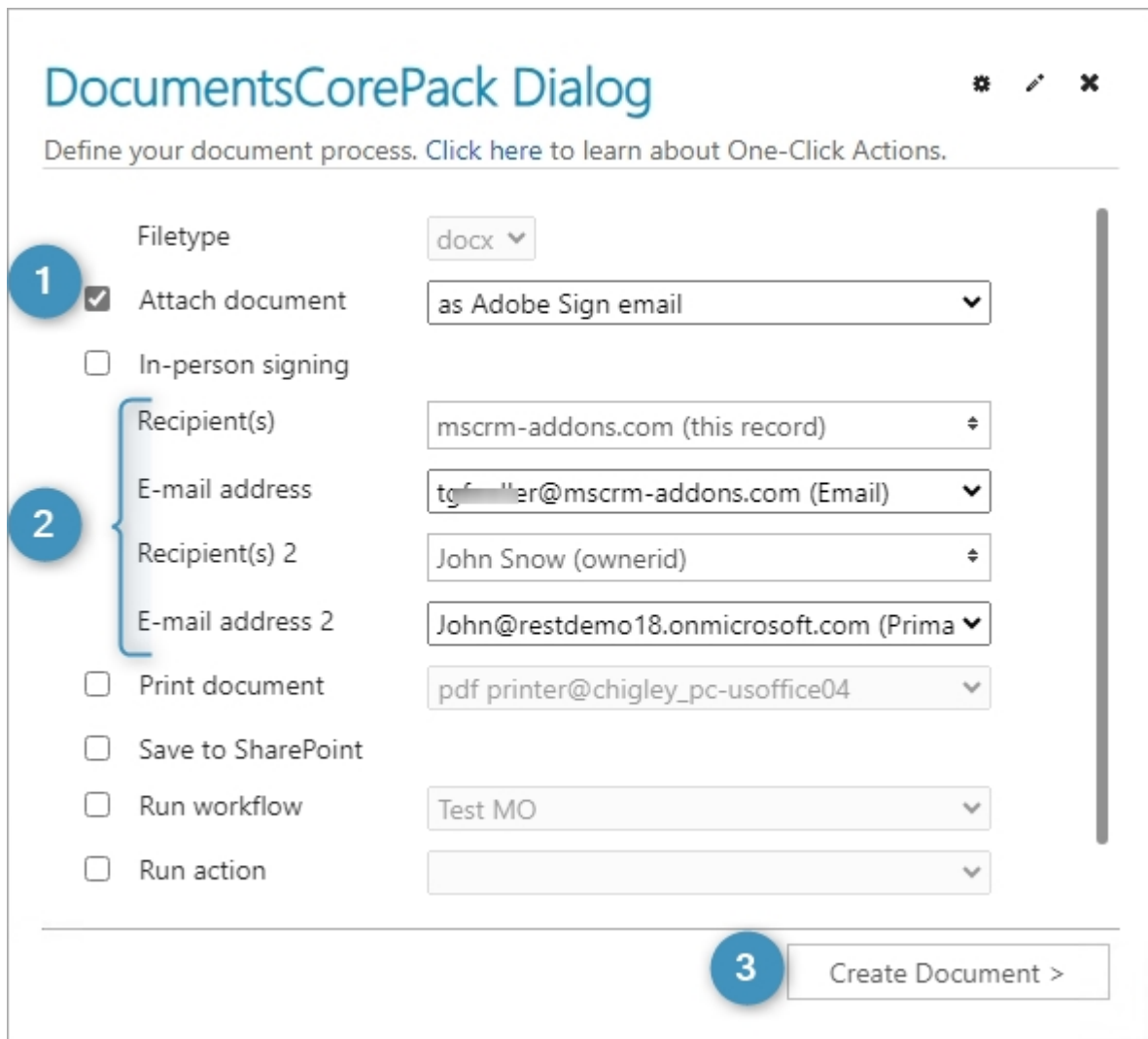
Figure 4: DocumentsCorePack template for two signees

First, select the template you want to execute.

Then specify the intended functionality of your document. In this scenario, we want the document to be attached. To do this, mark the ❶ **Attach document** checkbox and choose **Adobe Sign e-mail** from the available options in the drop-down menu. Proceed by selecting the ❷ **recipients** and providing their respective e-mail addresses. In this particular case, there are two recipients, as we have two individuals who need to sign the document.

Please note: The document will be sent to the first recipient initially, and upon signing, it will then be forwarded to the second recipient.

Continue with the ❸ **Create Document** button.

Figure 5: DocumentsCorePack Dialog - define how your document should be executed

You can open, review, and edit the document before proceeding to Adobe Sign. Simply click on the attachment to open the document.
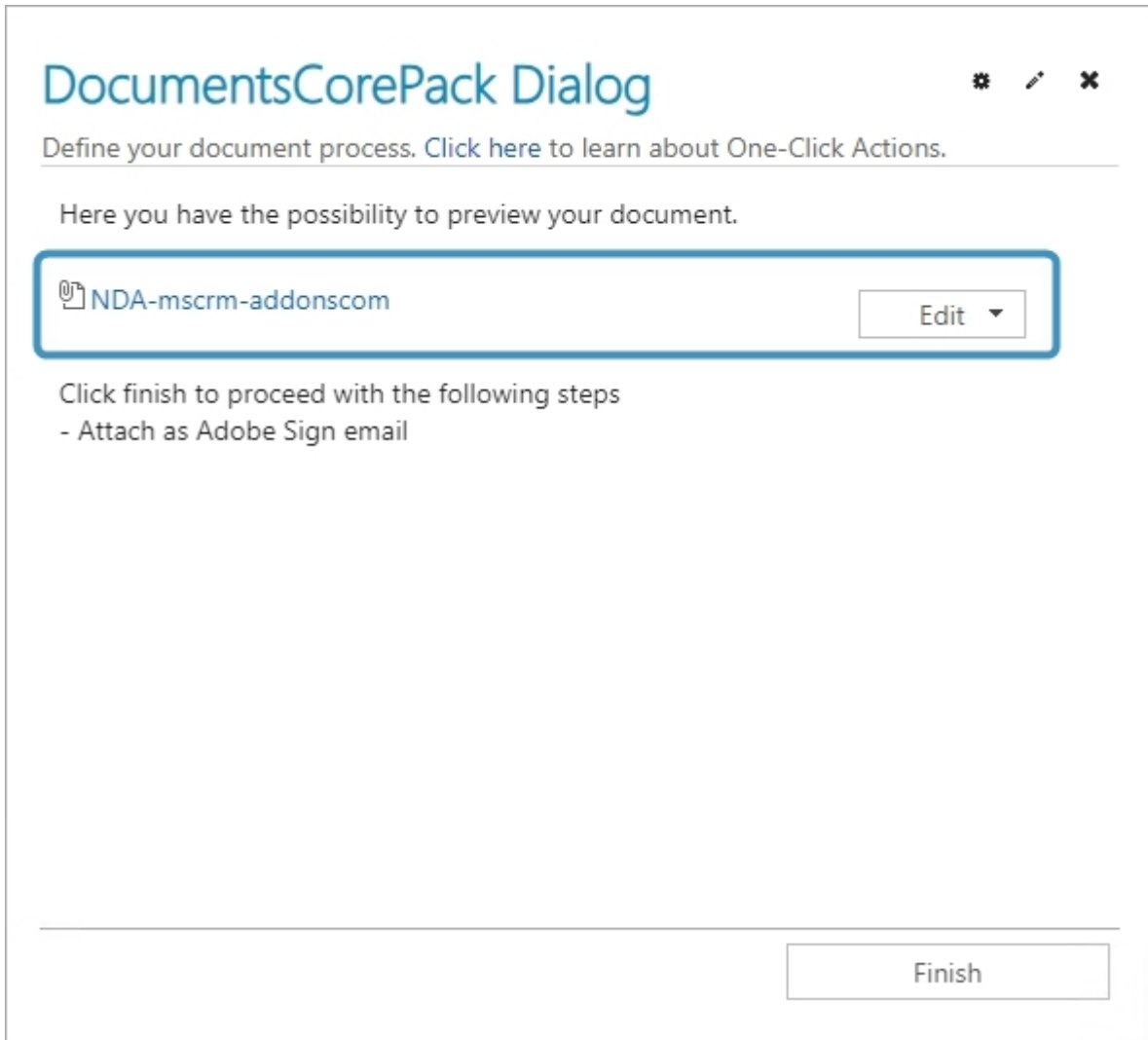

Figure 6: DocumentsCorePack Dialog – Preview document

This opens a preview of your document. As you can see hihglighted, there are two different Adobe Sign text tags:
- one for the signatures of the two signees and
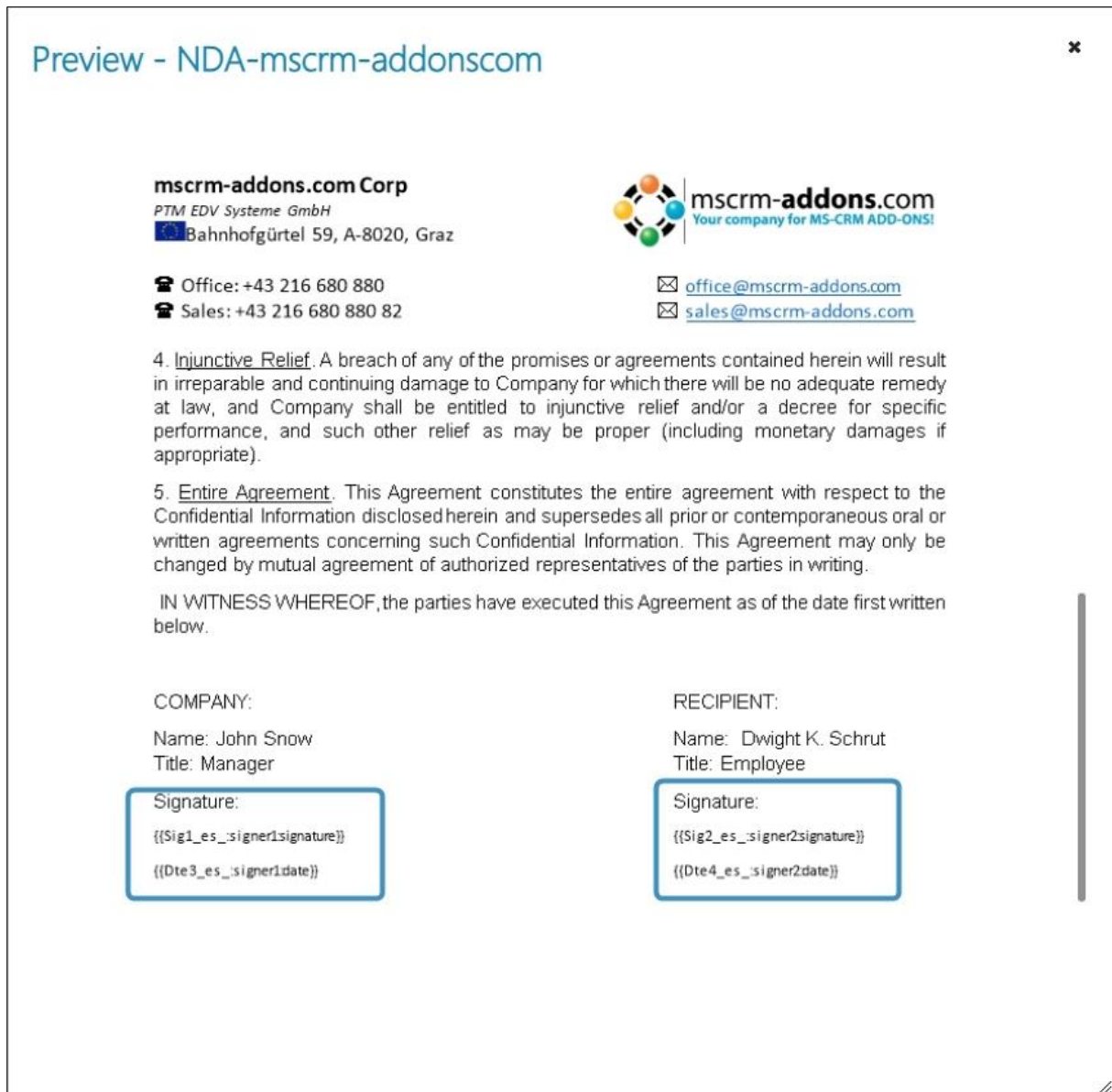- one for the date that each signature was made.

Figure 7: Preview

If you are pleased with the document, 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.
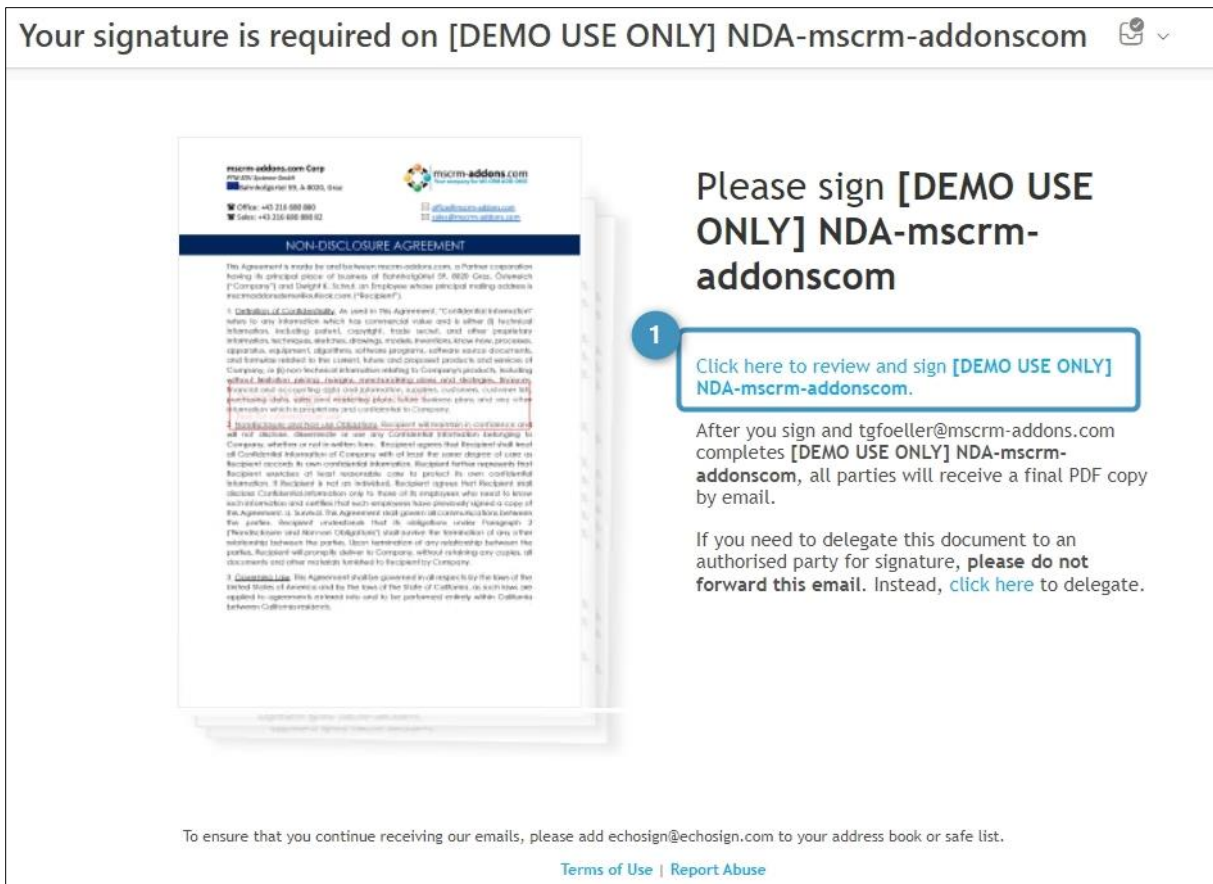
Figure 8: E-mail with Adobe Sign document

❶ **Click here to review and sign**: The document opens in a browser where the recipient is asked to review and sign the document. As you can see in the figure below, the fields that must be completed by the first recipient have been completed and are marked by **Start**.

A click on the **Click here to Sign** button at the bottom will finish the process, send the document to the second recipient (selected before) to be signed, and offer the option for a copy to be downloaded.

In the so-opened window in your browser, you can see ❶ the signers' details, ❷ the steps of the process, and the document, which now contains ❸ both signatures. Click on ❹ Download PDF to download your signed document.
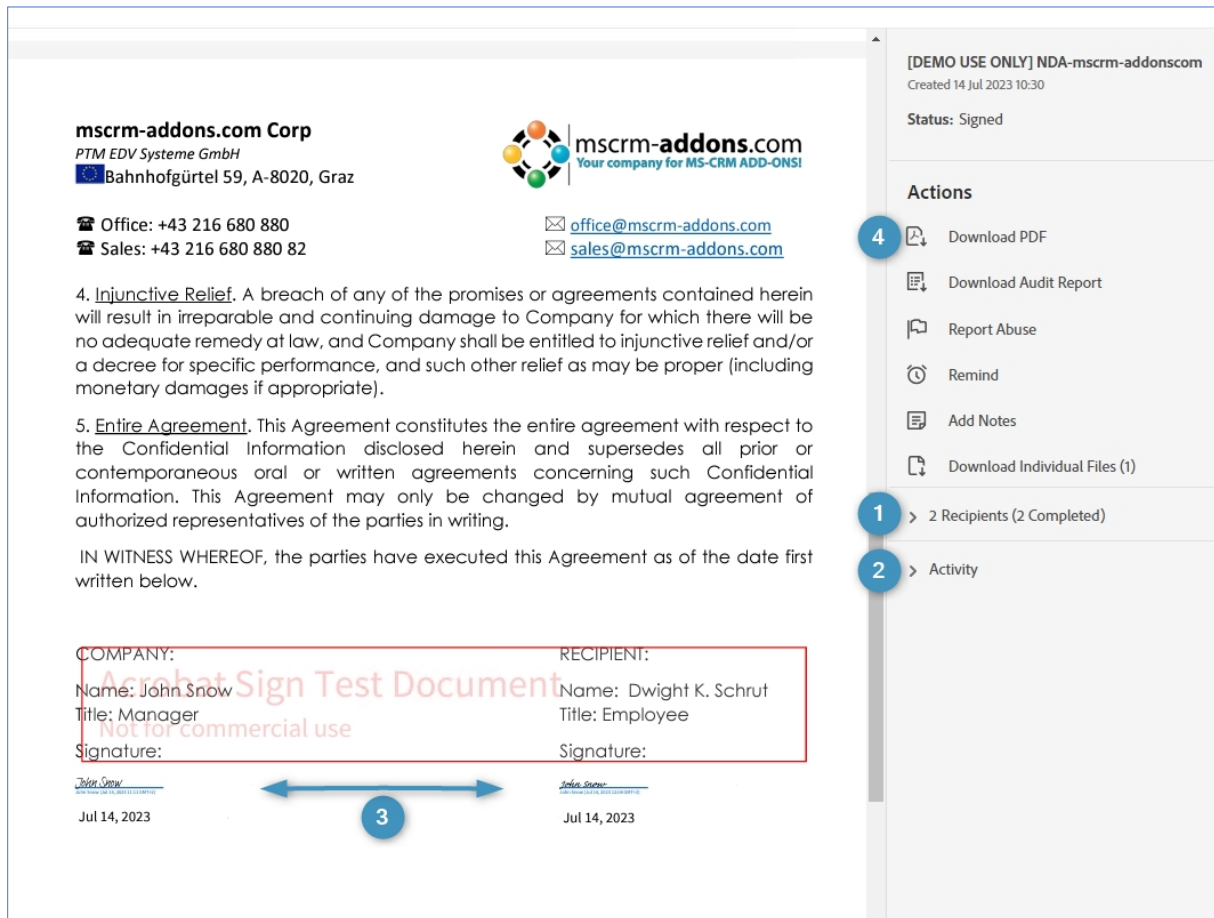

Figure 9: Signed document ready for download

Congratulations! You signed your first document with Adobe Sign.

4.2. 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 required to be with the host to sign the documents.

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

As explained in the last chapter, start by opening your Dynamics 365, and search for the entity you want to create a document for. Next, hit the **Create Document** button, which opens the DocumentsCorePack dialog, as you can see in the Figure below.
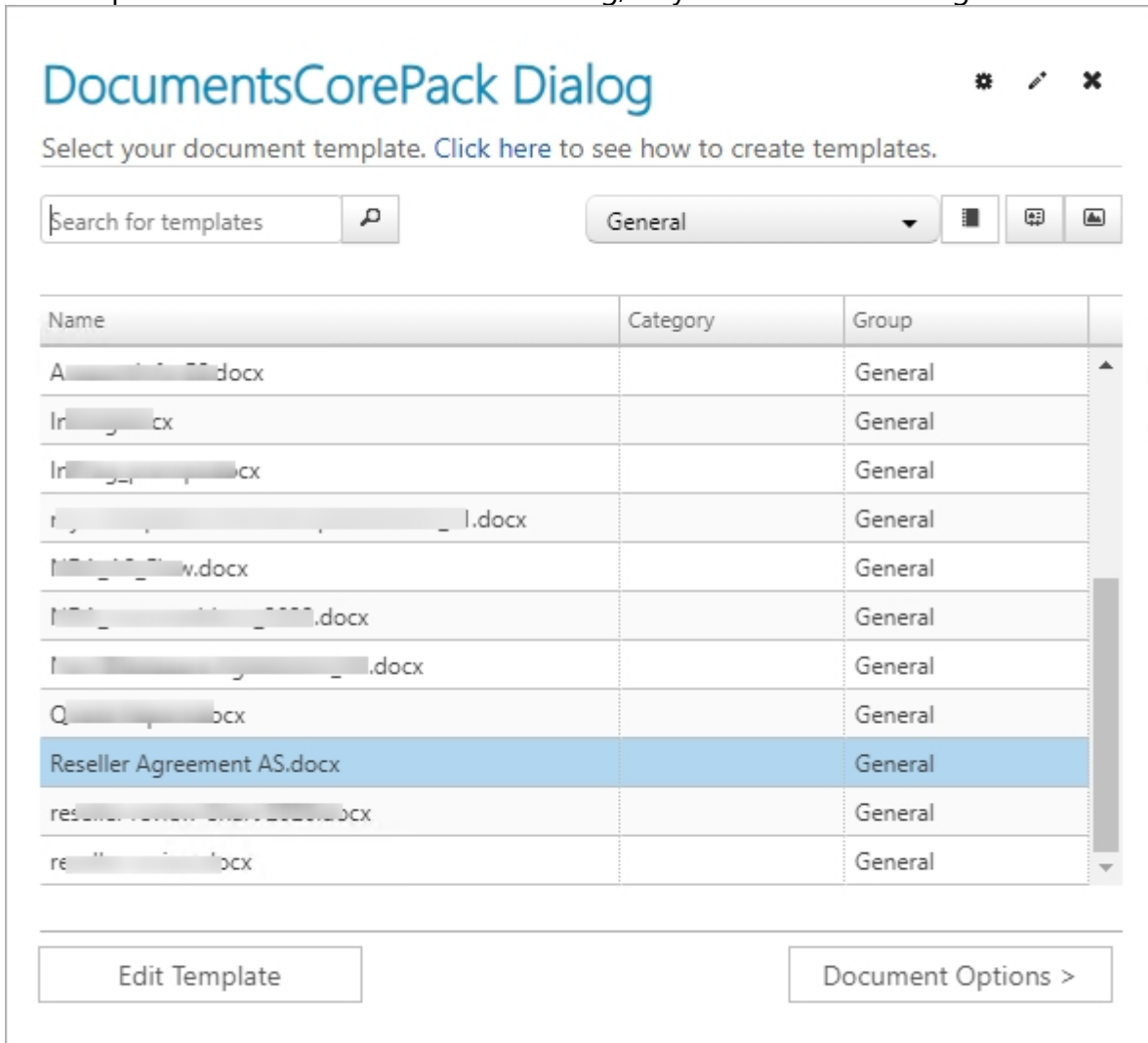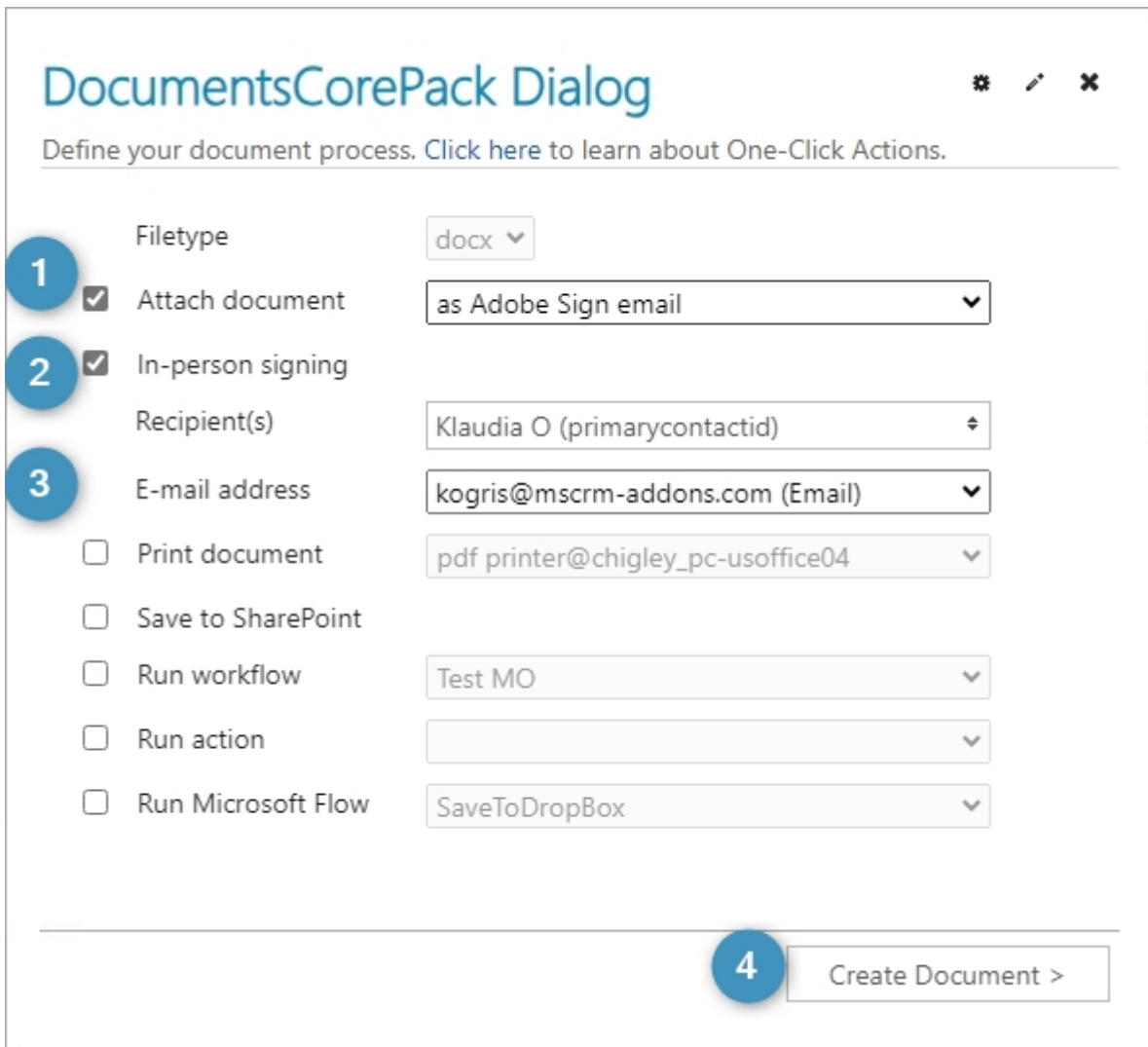

Figure 10: DocumentsCorePack Dialog - Select template

Choose the template you wish to execute.

Afterward, specify the desired functionality for your document. In this instance, we select the ❶ **Attach document** checkbox and choose ❷ **as Adobe Sign e-mail** from the provided options. Additionally, check the ❸ **In-person signing** checkbox and select your recipient, along with their corresponding e-mail address, from the dropdown menu.

Please be aware that the recipient should be the individual (the host, as mentioned earlier) who must accompany the signer to sign the document. Proceed by clicking ❹ **Create Document**.

Figure 11: DCP Dialog - Specify the functionalities for your document

The next window allows you to preview and edit your document, as explained in the chapter before. Hit **Finish** to continue.
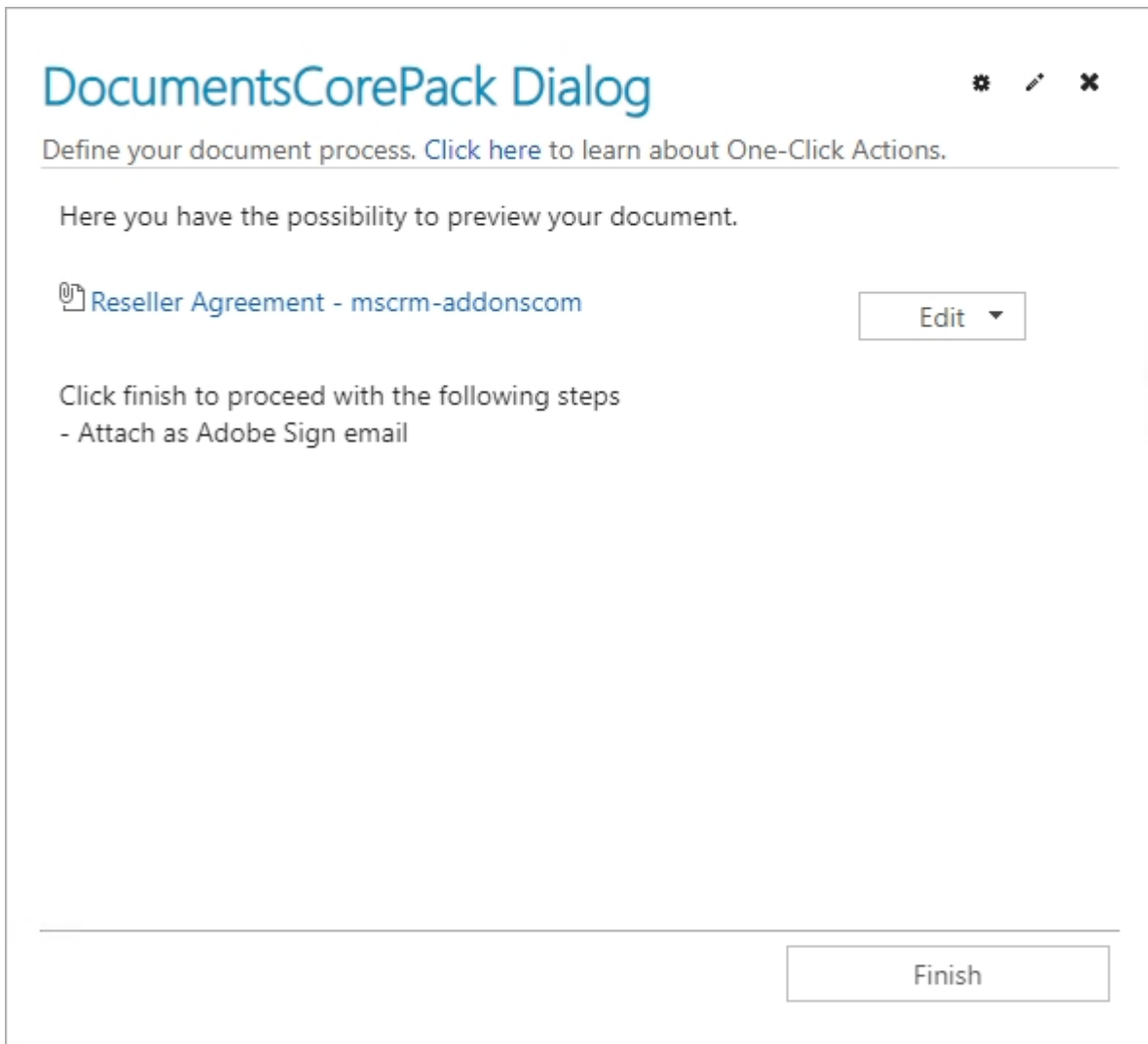
Figure 12: Preview or edit document

Now you are able to open the document directly from the DocumentsCorePack dialog, as you can see in the figure above.
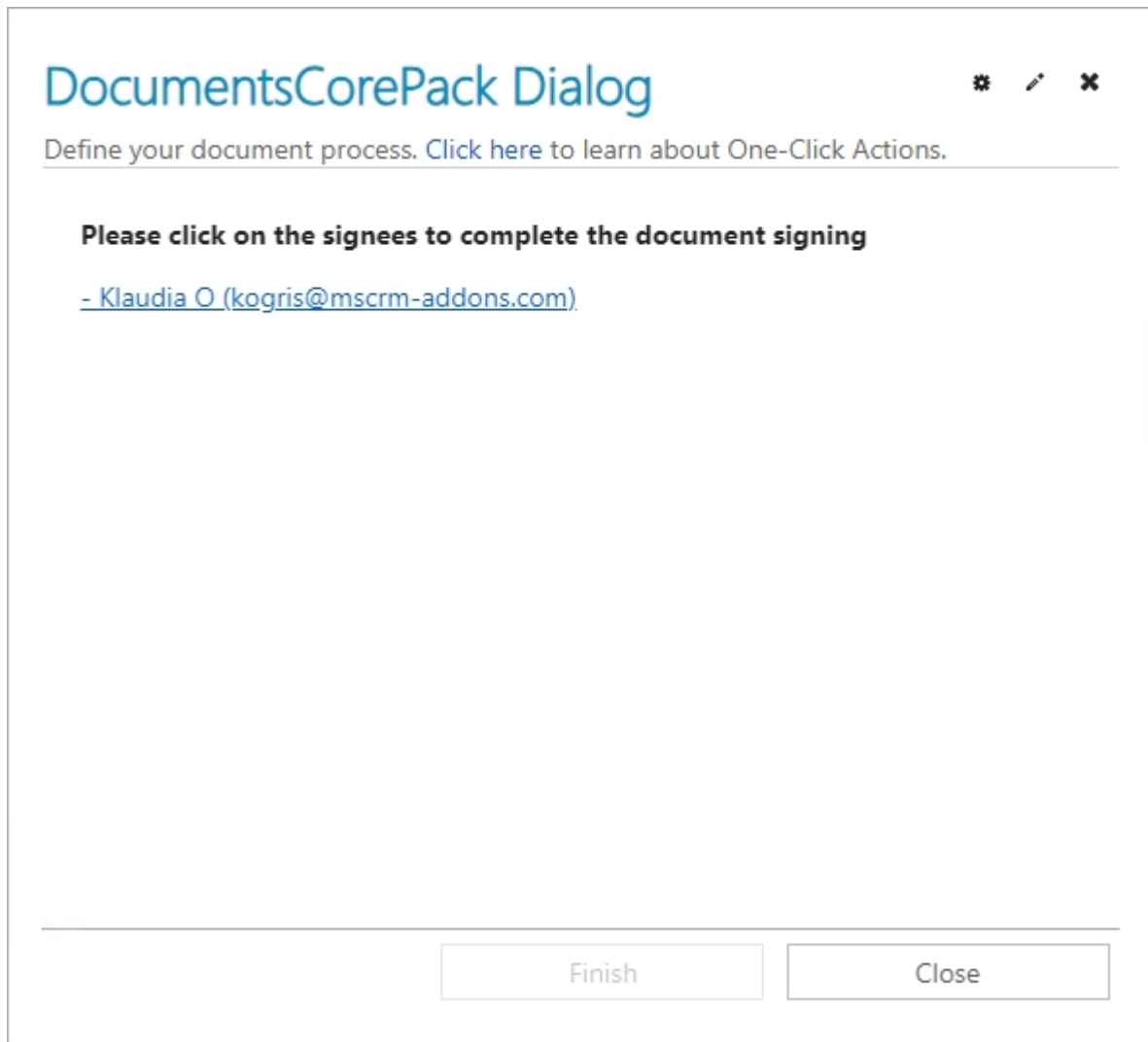
Figure 13: Complete the document signing

An e-mail has also been sent to the host, who is required to be with the signer in order to sign the document. With a click on the blue text **Review and sign**, as shown in the Figure below, the document opens in a browser to be signed.
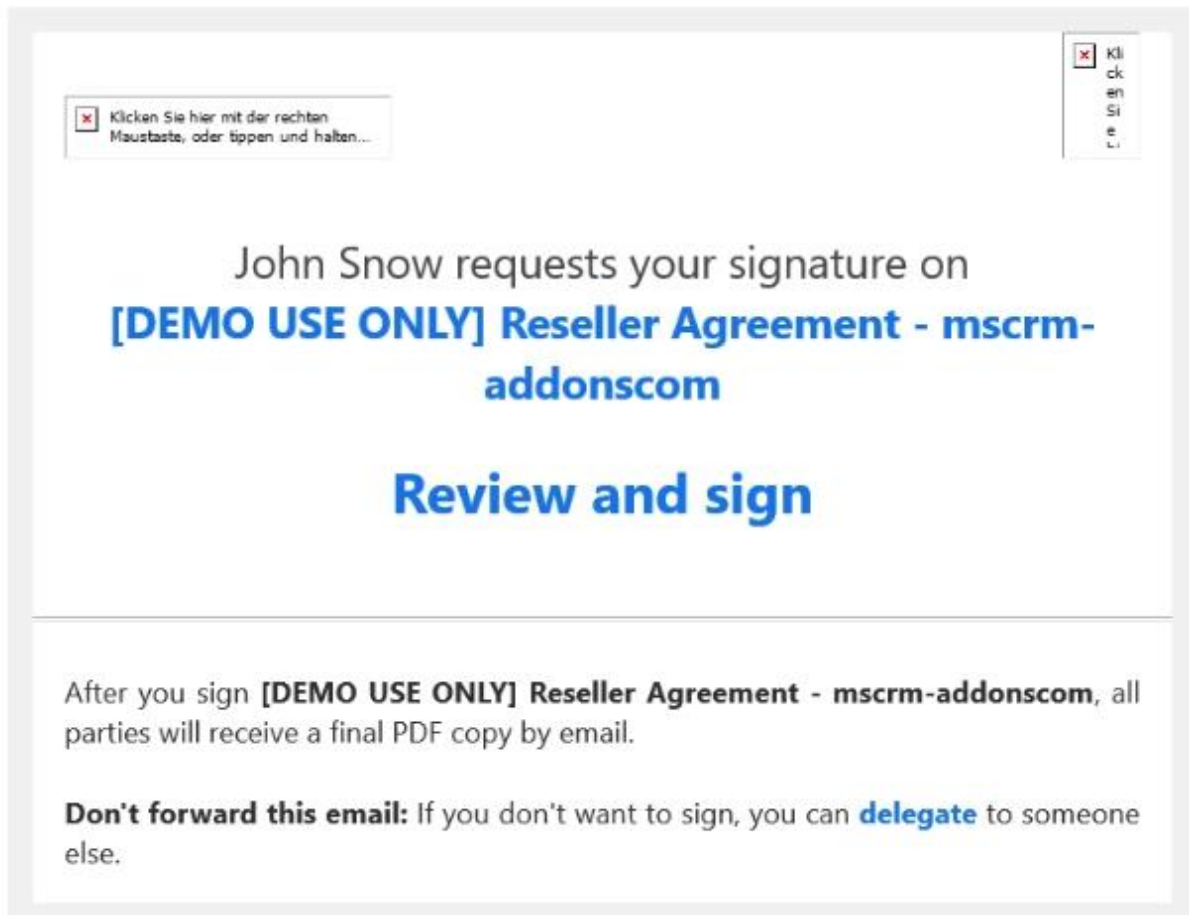
Figure 14: E-mail with link to Adobe Sign document

After the signer inserts their signature into the document, the host must hit the ❶ **Click to Sign** button at the bottom of the page. A window with the signature pops up. Press ❷ **Apply**.
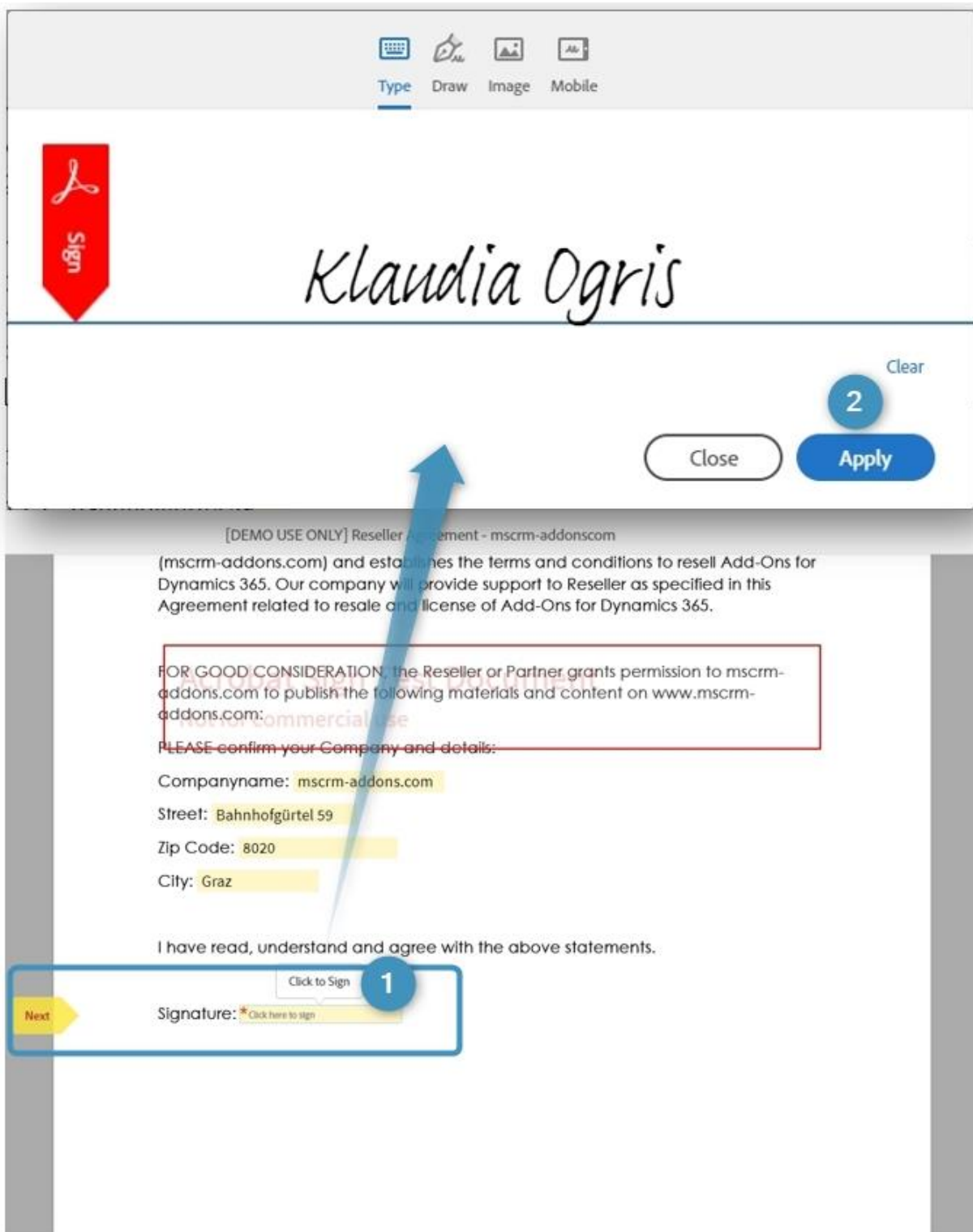
Figure 15: Sign the document

After you have applied your signature and finished signing, you will get an e-mail.
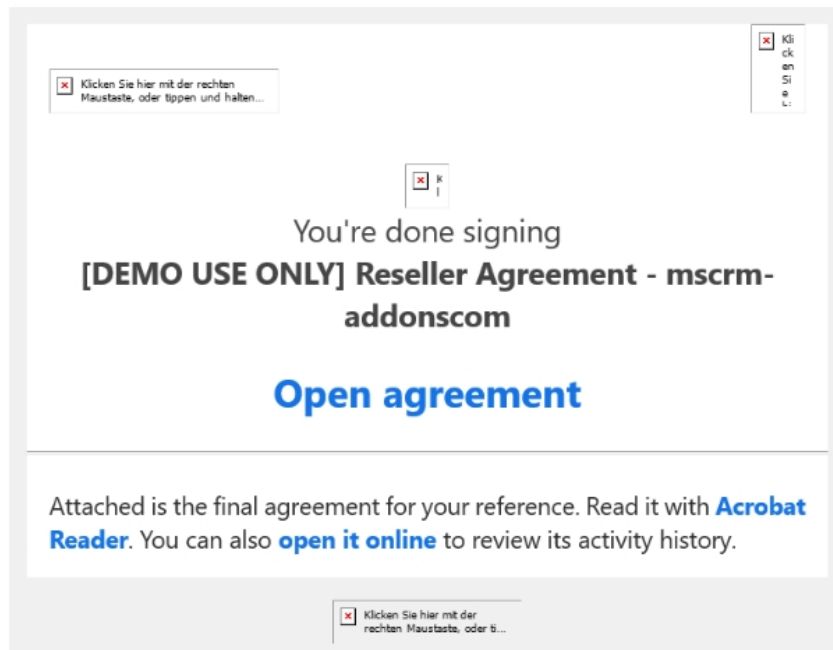
Figure 16: Document successfully signed

After opening the agreement, you can not only view the signed document, but you can also choose from the available actions on the right side, such as downloading a .pdf file of the document.
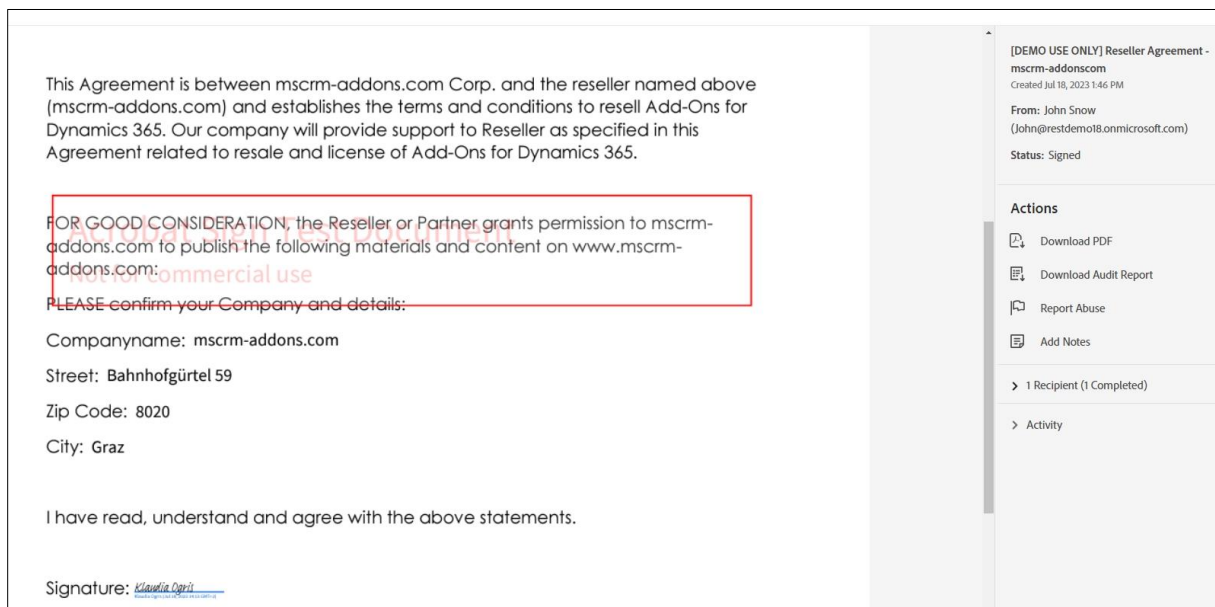

Figure 17: Signed agreement

4.3. How to create a document and sign it with Adobe Sign Workflow

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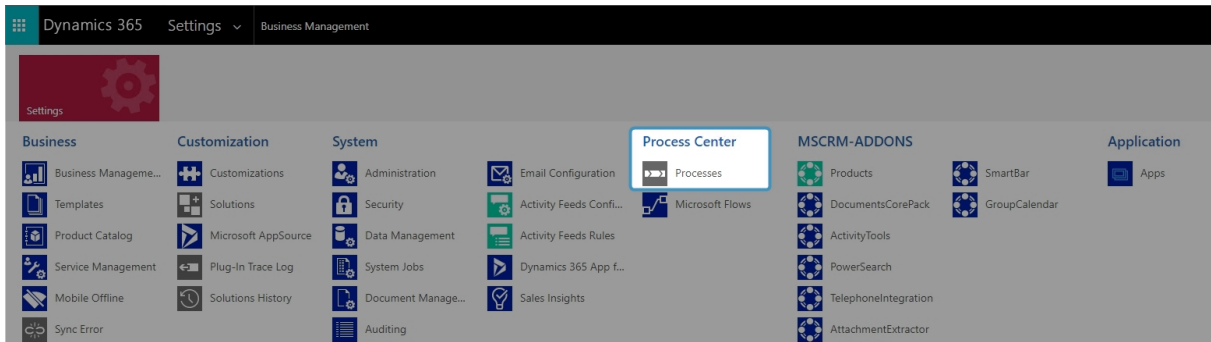

Figure 18: Dynamics 365 > Settings > Processes

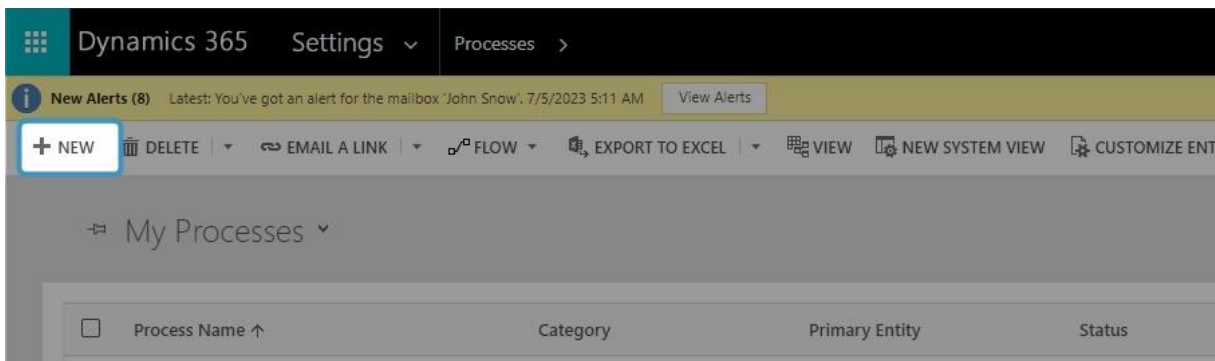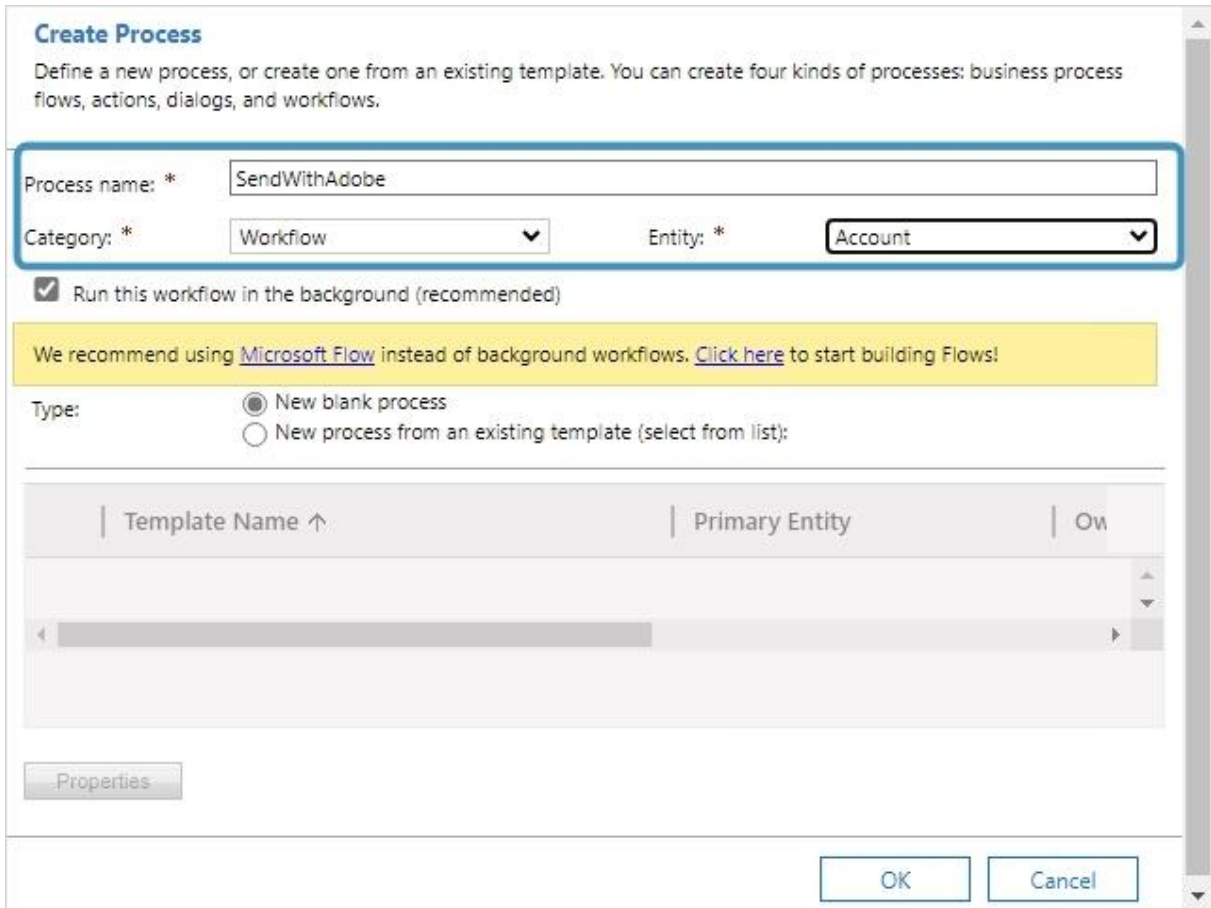Create a new process by clicking the **New** button.

Figure 19: Add new process

You can create your process like you usually do in Dynamics 365. However, it is necessary to select Workflow for Category. Please fill out all the mandatory fields (indicated with a red asterisk) and proceed with **OK**.

Figure 20: Create process

After customizing the properties of your Workflow, click on the **Add Step** button and choose **Create Record**, as shown below.
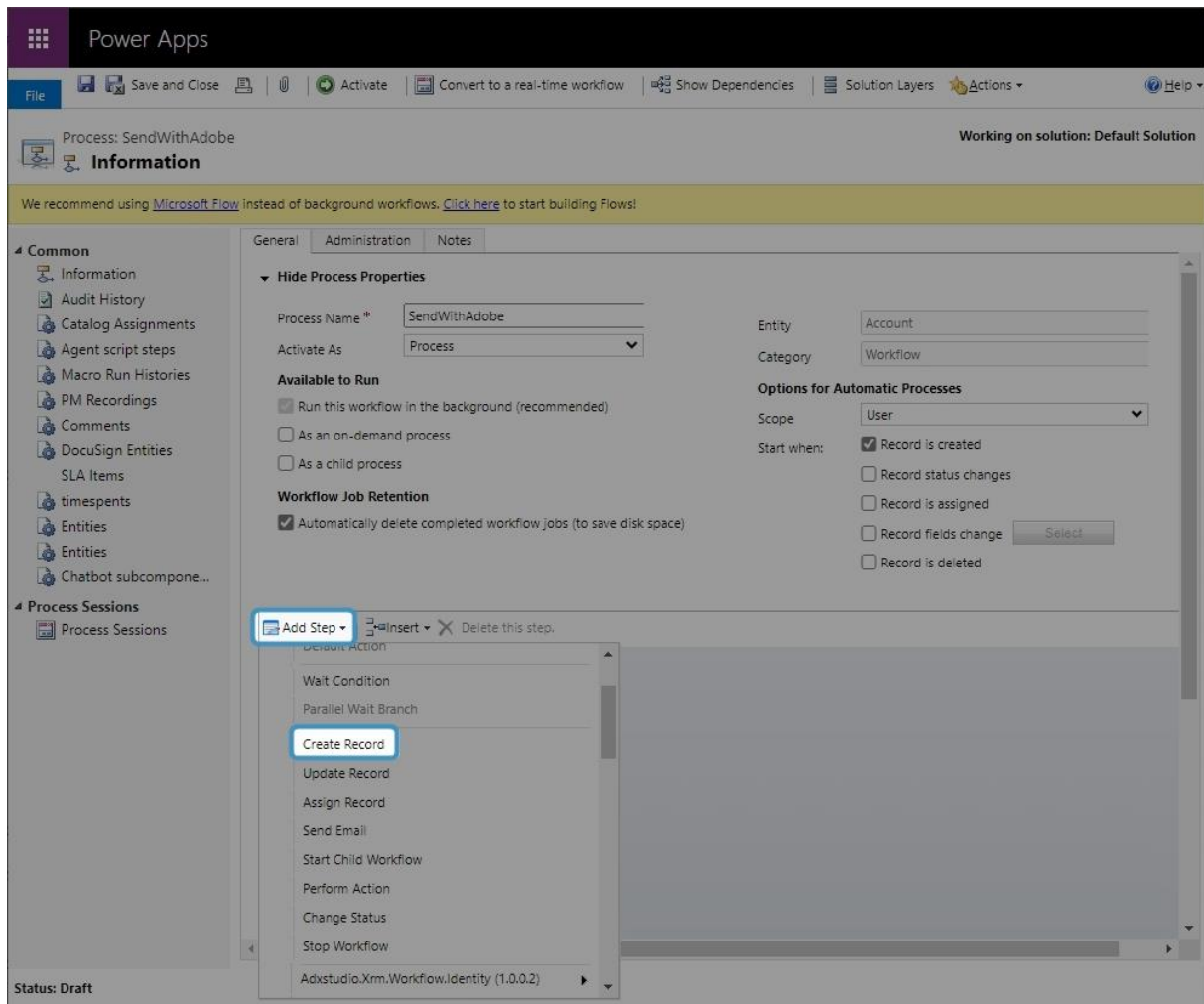
Figure 21: Add step Create Record

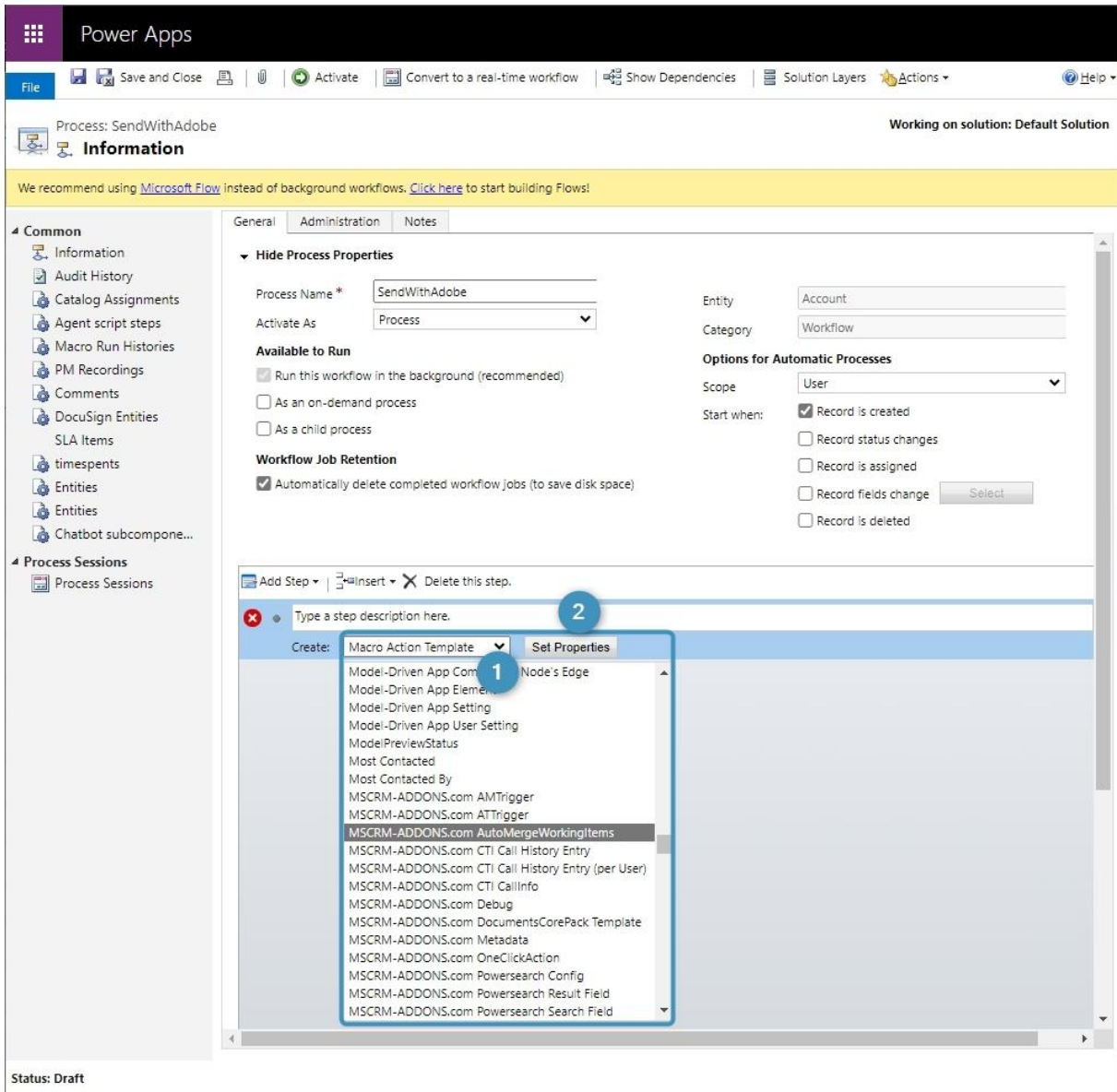A click on the ❷ **Set Properties** button will provide you with the window below.

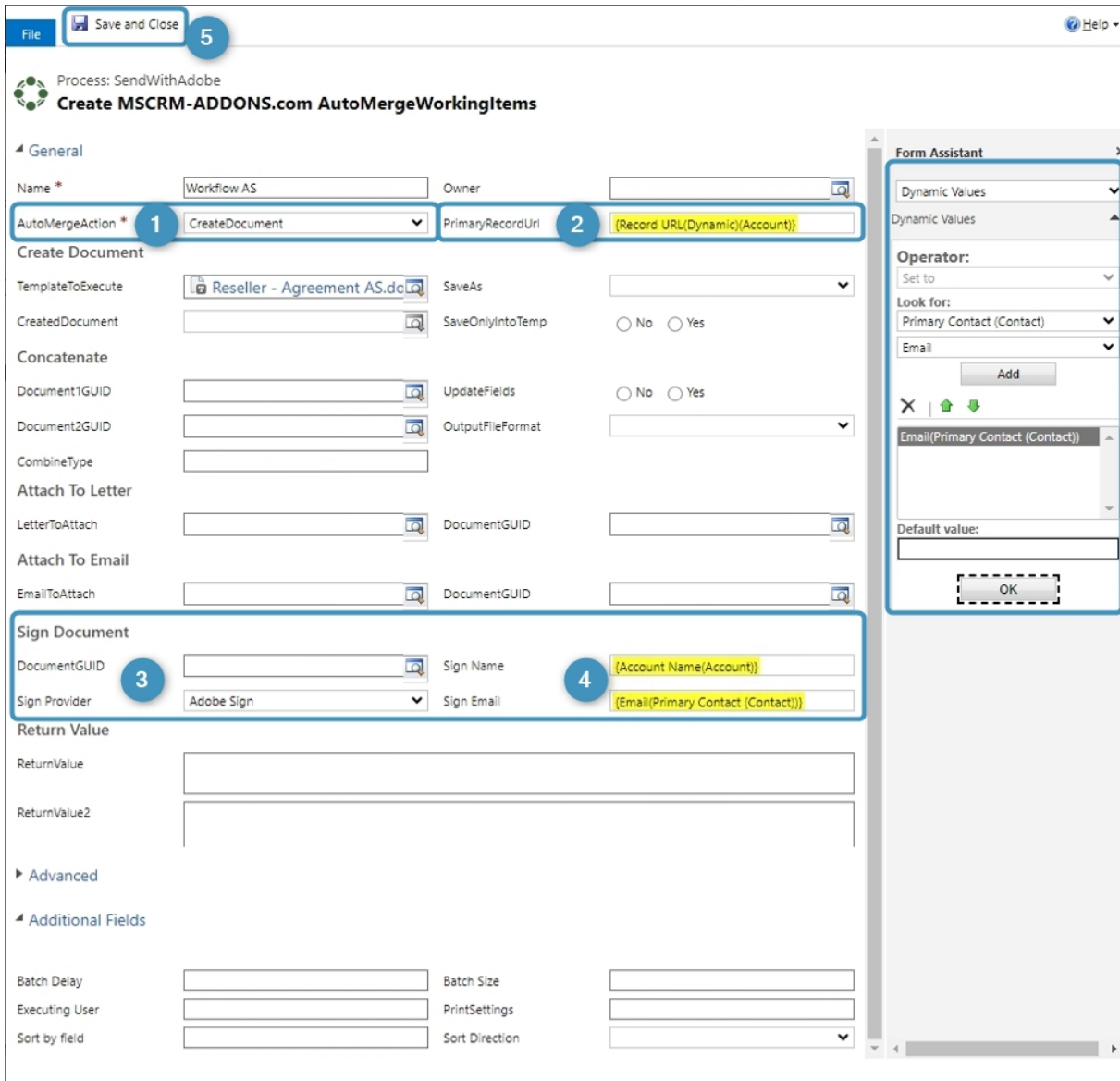*Figure 22: MSCRM- ADDONS.com AutoMergeWorkingItems*

Figure 23: Set properties

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

❷ Next, you must 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.

❸ Scroll down to the Sign Document section and do the same as in step 2 to add the DocumentGUID. Select **AdobeSign** as the **Sign Provider**.

❹ 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 e-mails, for example, Max Power|John Smith. It is important when your template has more than one signee.

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

Finally, you must activate your workflow to use it. Since this is just a draft, click the **Activate** button.
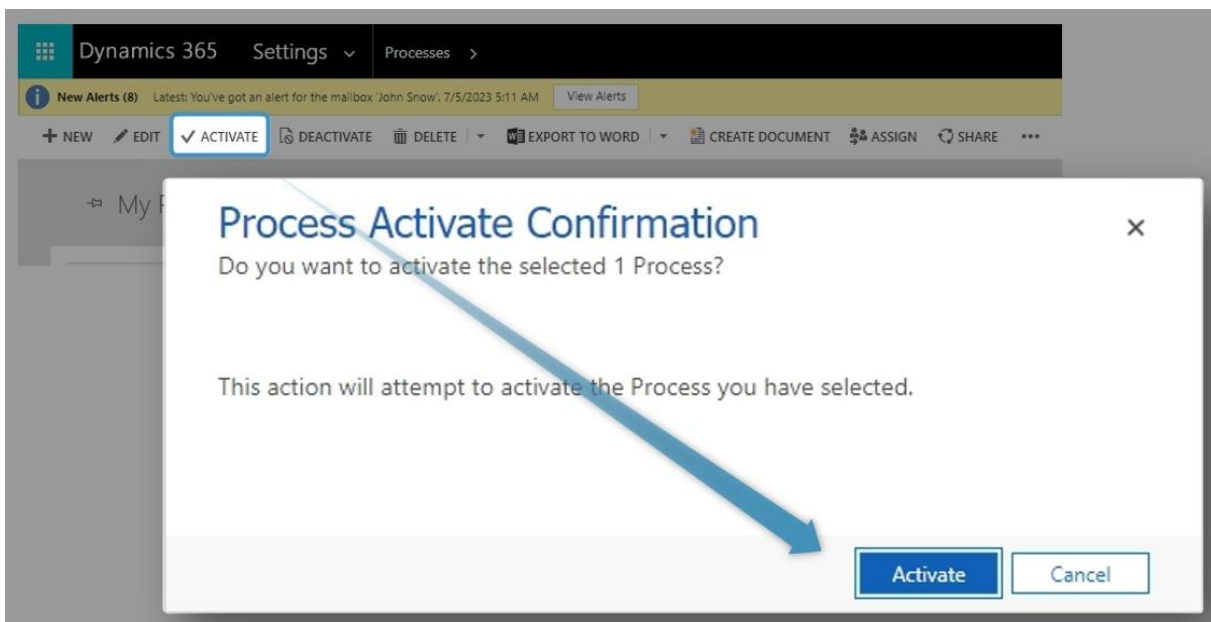

Figure 24: Activate Workflow

4.4. How to set a signing order for Adobe Sign

An electronic signature is data that can be used to identify the signer or signature creator and to verify the integrity of the signed electronic information. Electronic information is usually in the form of electronic documents. From a technical point of view, the electronic signature fulfills the same purpose as a handwritten signature on paper documents.

To avoid all signer recipients receiving the e-mail at the same time, it is possible to change the signing order. Follow the step-by-step tutorial below.

Open a Word document and navigate to www.mscrm-addons.com in the menu bar and click on **Insert MailMerge Fields**.
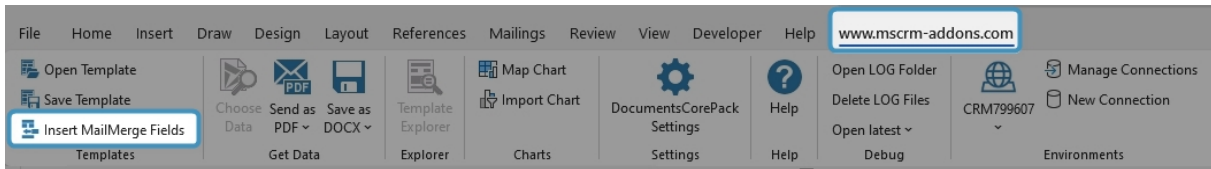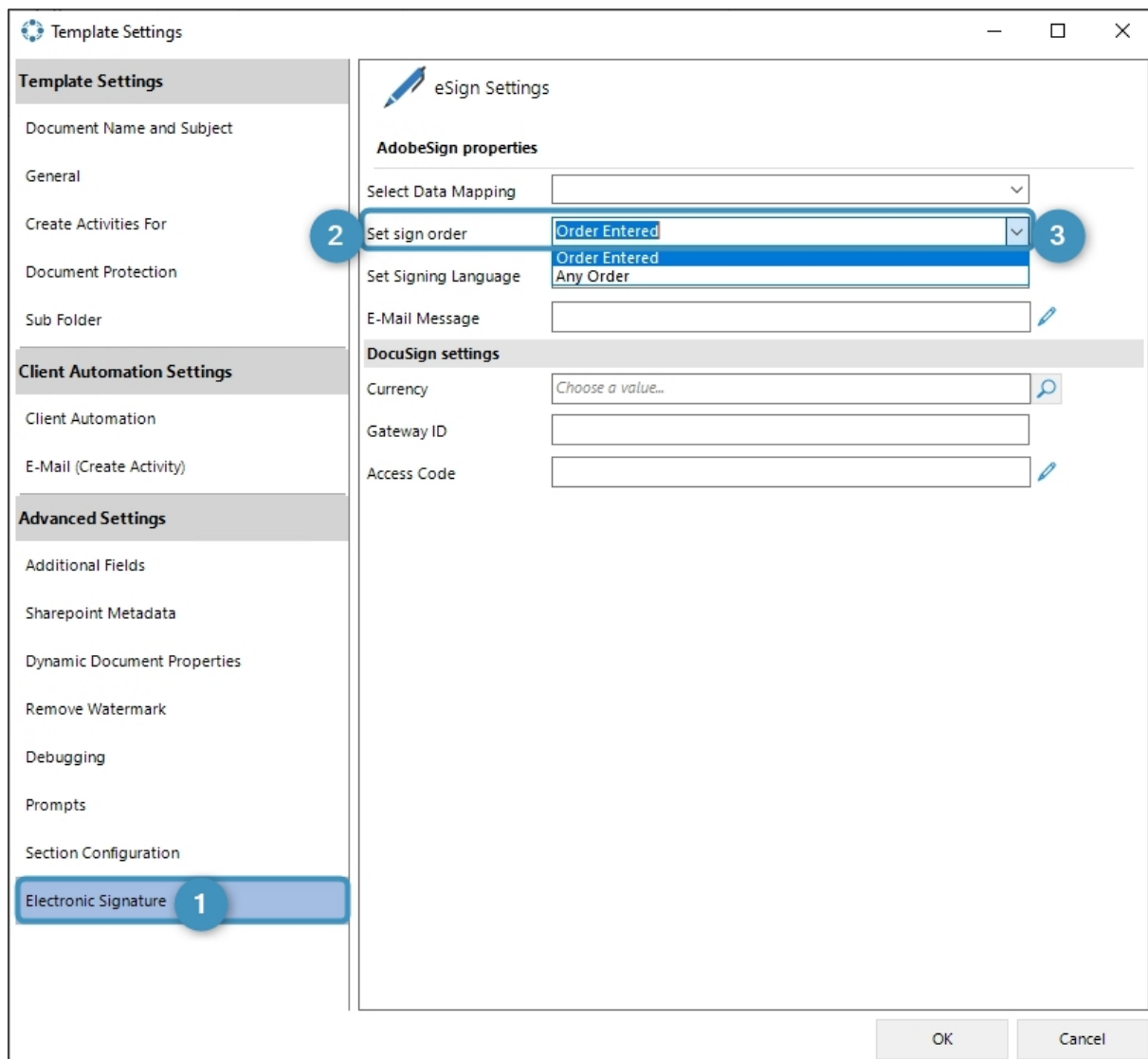
Figure 25: Open DocumentsCorePack Template Designer

Click the **Advanced Template Settings** and the **Template Settings** window pops up. Navigate to the group ❶ **Electronic Signature**, find the option ❷ **Set sign order** and select ❸ **Order Entered**, then the e-mails will be sent to the next person after signing.

Please note: The group **Electronic Signature** is only visible when **Adobe Sign**, **DocuSign** or **AssureSign** is installed.

Save the template. Then start the signing process and send it to Adobe.

5. List of Figures

6. Contact

For further technical questions, please visit our blog 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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