e-Signatures – AssureSign User Guide for MS CRM 2015/2016 and Dynamics 365

October 2021

e-Signatures AssureSign User Guide
(How to work with e-Signatures for MS CRM 2015/2016 and Dynamics 365)

CONTENT

Preamble

This documentation is intended to guide you through the usage of e-Signatures made with AssureSign in Microsoft Dynamics 365 (CRM).

PLEASE NOTE e-Signatures require the installation of DocumentsCorePack. For further information on DocumentsCorePack, have a look at our [documentation](#) on DocumentsCorePack or get your free trial version of the product [here](#).

Target Audience

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

- Basic Microsoft Dynamics 365 (CRM) knowledge

Supported Web Browsers and versions

Supported Web Browsers:
- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM must be available:
- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

Purpose of e-Signatures?

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

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

1 AssureSign for DocumentsCorePack

DocumentsCorePack offers the possibility to use AssureSign as an additional feature. AssureSign simplifies the world of e-signatures. It is a tool that empowers you to electronically sign documents.

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

We differentiate between the *Classic Setup,* the legacy AssureSign solution using SOAP based communications and *Simple Setup* for new installations, the new solution for Dynamics 365 which uses AssureSign V3 APIs and Simple Setup templates should be used.

1.1 Classic Setup

The Classic Setup is the legacy AssureSign solution using SOAP based communications. Please follow the steps in this part of the documentation:

- Create an AssureSign Account
- Install AssureSign in Dynamics 365
- Setup AssureSign to work correctly in Dynamics 365

For more Information about how to install and setup AssureSign for Dynamics 365 please follow the Installation-Guide from AssureSign.

1.2 Simple Setup

This documentation is for the new solution for Dynamics 365 which uses AssureSign V3 APIs and Simple Setup templates should be used and make sure, that *DocumentsCorePack Version 2020.105* is installed on your Dynamics 365:

- Create an AssureSign Account
- Install AssureSign in Dynamics 365
- Setup AssureSign to work correctly in Dynamics 365
- Create a SettingsKey for AutoMerge with name AssureSignREST and value true. Here are more information on how to create a settings key manually.

For more Information about how to install and setup AssureSign for Dynamics 365 please follow the Installation-Guide from AssureSign.

1.2.1 How to work with AssureSign in DocumentsCorePack – Classic & Simple Setup

To work with AssureSign, DocumentsCorePack needs some AssureSign-templates.

These AssureSign-templates do have nothing in common with our DocumentsCorePack-templates!

AssureSign-templates are defining how AssureSign should work with DocumentsCorePack-templates, like who is getting the emails and when and how AssureSign *detects* the Fields (and Data) in a DocumentsCorePack-template.

At the moment, DocumentsCorePack cannot create them dynamically for you during the merging-process, so you have to import some *Dummy-AssureSign*-templates before DocumentsCorePack can merge (and send) any document.

DocumentsCorePack needs an AssureSign-Template responding to the number of signers.

So, if there

is 1 signer, DocumentsCorePack needs an AssureSign-Template called "mscrmAddons_1Signer",
are 2 signers, DocumentsCorePack needs an AssureSign-Template called "mscrmAddons_2Signer",
are 3 signers, DocumentsCorePack needs an AssureSign-Template called "mscrmAddons_3Signer".

Please follow this link and download the *AssureSignTemplates.zip – Classic or Simple Setup*.
The file includes 3 files, which means you can use up to 3 signers in AssureSign.

1.2.2   How to import the AssureSign templates - Classic Setup

The import of AssureSign templates requires only a few short steps which are to be explained in the following chapter.

1) Expand the files into a Temp-Folder.

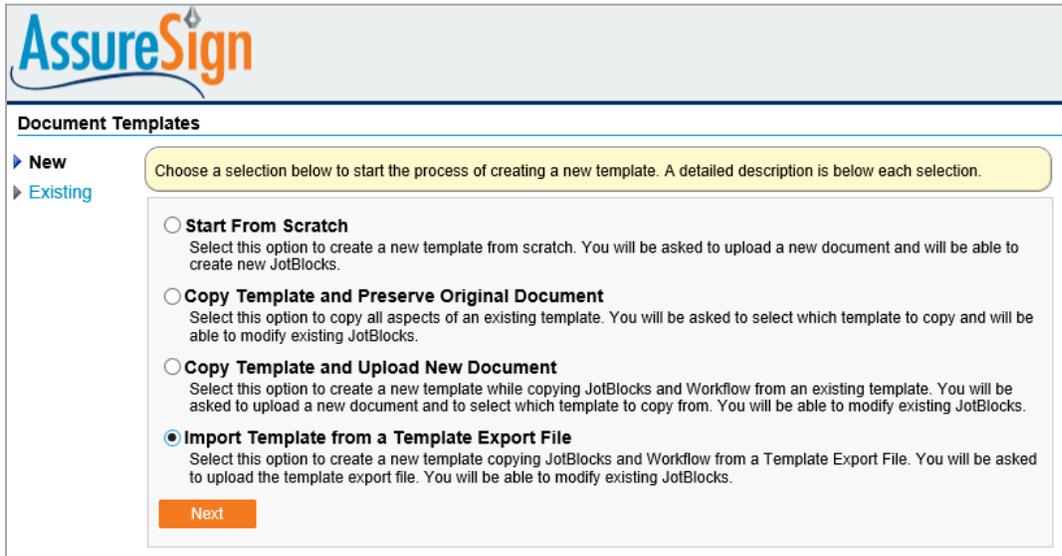2) Login to your AssureSign Homepage and change to *templates*.

Figure 1: AssureSign – Documents Templates

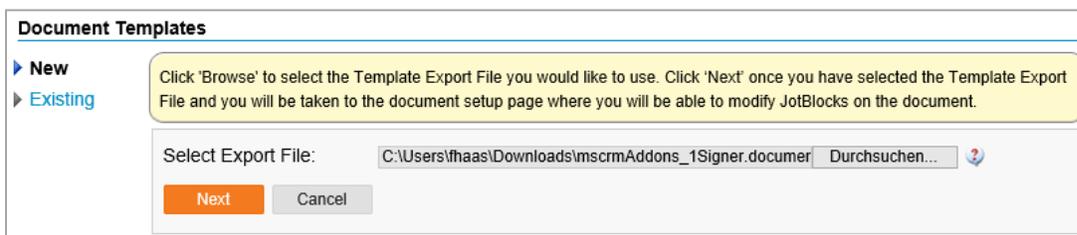3) Select the *New*-tab and *Import Template from a Template Export File*. Then click on the *[Next]*-button.

Figure 2: AssureSign – Add new template

4) Select the *mscrmAddons_1Signer.documentTemplate*-file from your Temp-Folder, where you have expanded the .zip-file before.

   Again, click on the *[Next]*-button.

PLEASE NOTE

Do not change the name of the template, because DocumentsCorePack is searching for this template!

Figure 3: Customize accessibility

5) Customize the *accessibility* (we recommend to access via *Account*).
   Click on the *[Next]*-button.

Figure 4: Define signatories

PLEASE NOTE

Do not change the name of the template, because DocumentsCorePack is searching for this template!

6) Now please click on the *[Next]*-button.
7) Accept the Points 2 to 5 by clicking on the *[Next]*-button.
8) Finally, at Step 6 press the *[Finish]*-button in order to finish the process.

Congratulations! You have successfully imported the AssureSign-Template for 1 Signer!

Please repeat the Points above to import the "mscrmAddons_2Signer" and "mscrmAddons_3Signer" AssureSign-Templates.

1.2.3   How to import AssureSign templates – Simple Setup

To import *AssureSign* templates, repeat the following steps for all three files in the .*zip*-file:

1) Expand the .*zip*-file to a *Temp*-folder.
2) Login on the AssureSign homepage and go to the View Templates (Simple Setup)-section. Click then on Import Template.
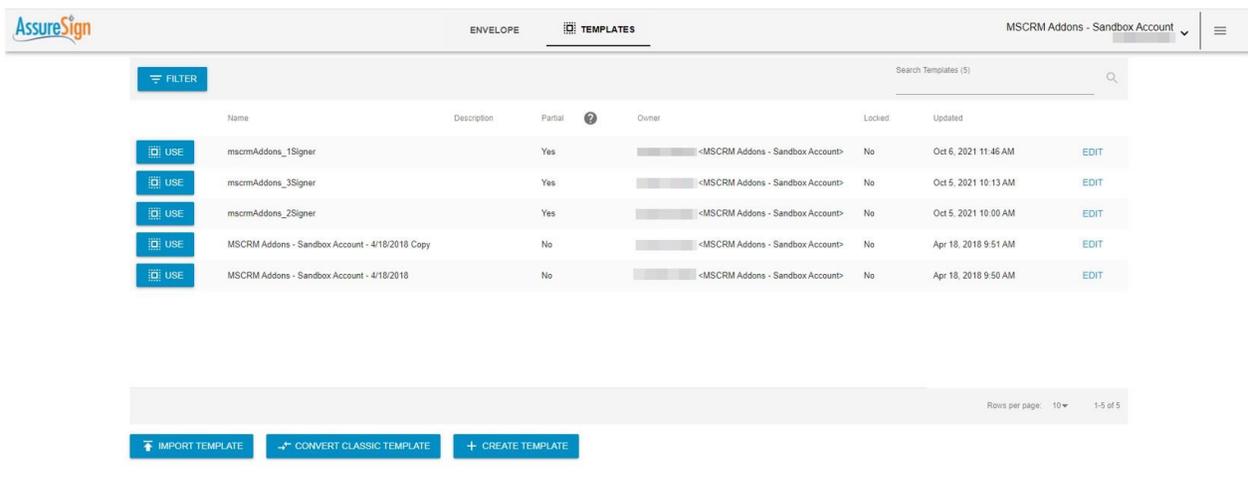

Figure 5: Import template form a template export file

3) Select the file *mscrmAddons_1Signer.AssureSignTemplate.V3_7.dat* from the temp-folder and click on the *[Next]*-button twice.
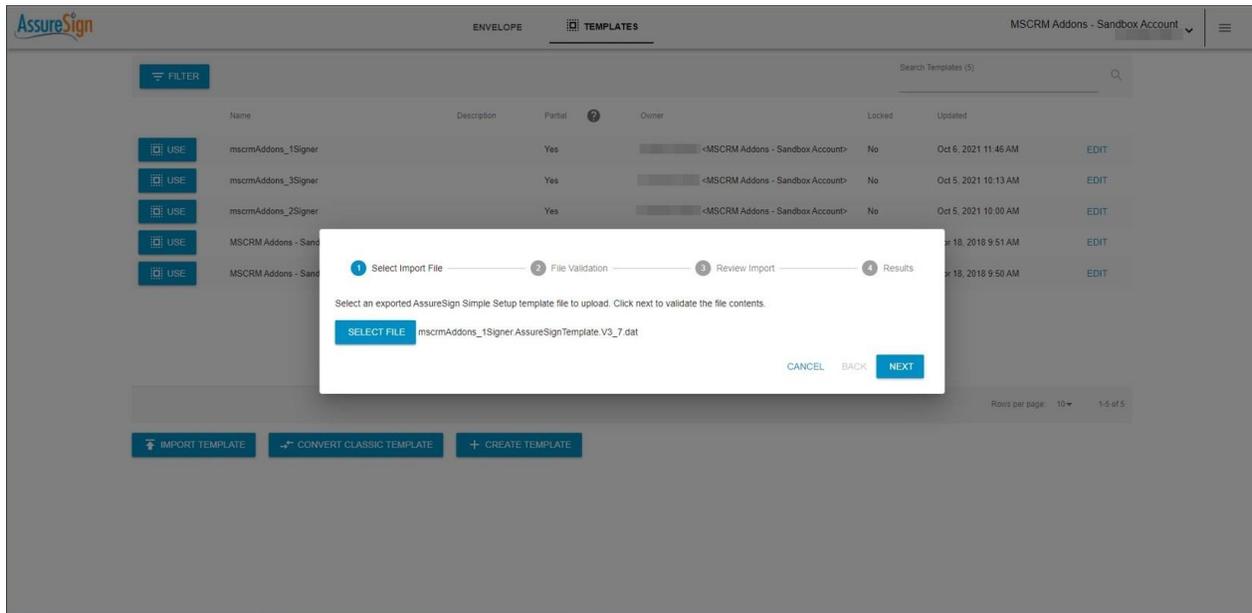

Figure 6: Select template export file

4) It is important to change the template name here to mscrmAddons_1Signer, because DocumentsCorePack is searching for the template name *mscrmAddons_1Signer* only!
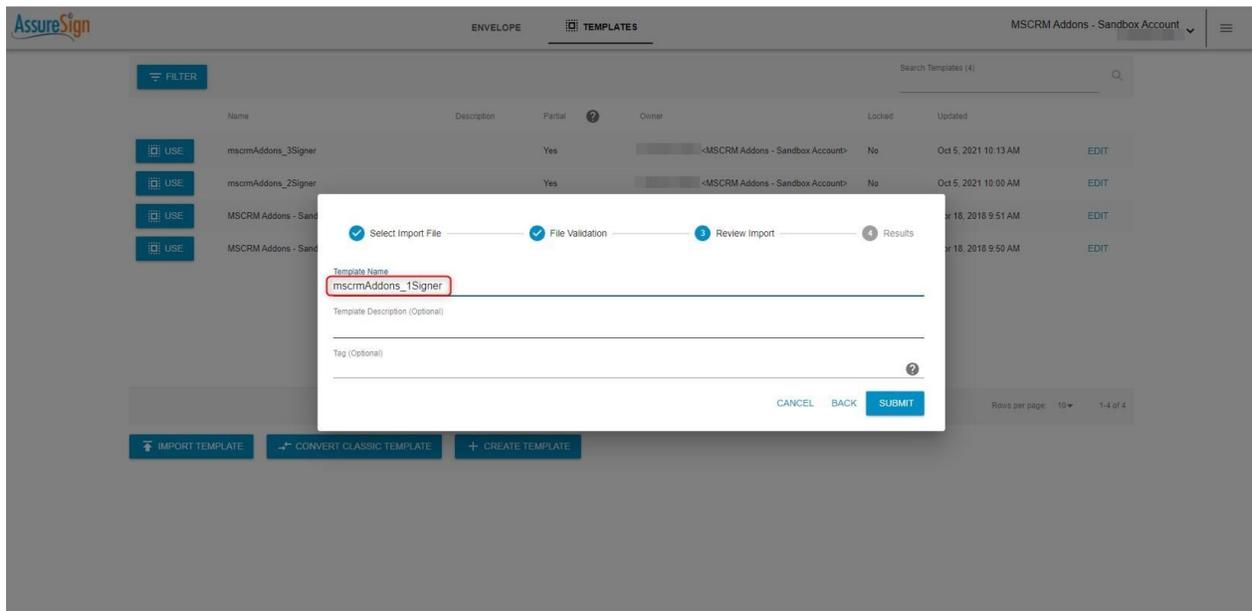
Click on the *[Submit]*-button to finalize the import.

Figure 7: Set template name

Congratulations! You have successfully imported the AssureSign-Template for 1 Signer!

2 DocumentsCorePack templates for AssureSign (1 signer) – Classic & Simple Setup

After you have imported the AssureSign templates (for further information, please see CHAPTER 1.2.2 HOW TO IMPORT THE ASSURESIGN TEMPLATES ON PAGE 6), you must create a DocumentsCorePack template for AssureSign. This chapter outlines how to create such a template for one signer.

Please find an example contract template with some inserted fields below.

Figure 8: Example contract template with inserted AssureSign fields

2.1   How to create a DocumentsCorePack template for AssureSign (1 signer)

To be able to insert fields into Microsoft Word documents, you must use the DocumentsCorePack TemplateDesigner. To do so, please insert the Insert MailMerge Fields in the www.mscrm-addons.com-tab of the Word document you wish to create your DocumentsCorePack template for AssureSign for 1 signer with. Please find all the information about how to use the Template Designer in the Template Designer User Guide on our website.

First of all, open the *[Insert MailMerge Fields]*-button in the command bar of the www.mscrm-addons.com tab of your Word document. Position your cursor in the Word document at the place where you want the future signature field to be.

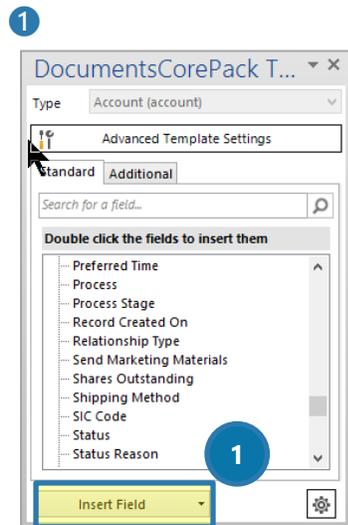Next, open the drop down menu of the *[Insert Field]*- button in the DocumentsCorePack TemplateDesigner. ❶

Figure 9: DocumentsCorePack Template Designer
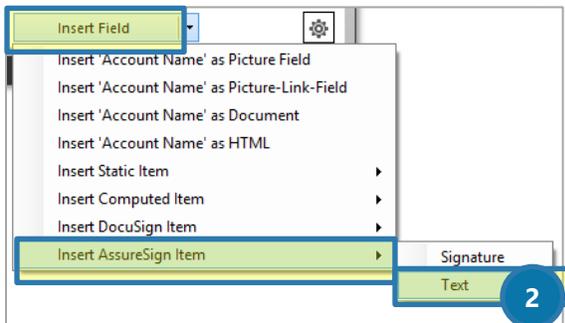
Then, select the *Insert AssureSign Item > Text* ❷

Figure 10: Insert AssureSign Item > Text

Please notice, that at the position of your cursor in the Word document, a field like this one will be visible now: <<ASText2>>

AS stands for AssureSign
Text (or *Signature)* for the Type of the AssureSign-Field
2 stands for the next number. (We need this number to make every AssureSign-field unique.)

2.2 How to set the properties of an AssureSign field

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

This is only possible when you have already inserted such a field. Please find a brief description on how to insert an AssureSign field into a DocumentsCorePack template in CHAPTER 2.1 HOW TO CREATE A DOCUMENTSCOREPACK TEMPLATE FOR ASSURESIGN (1 SIGNER) ON PAGE 11.

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

Figure 11: Selected AssureSign field

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

PLEASE NOTE

Because you can select between Text and Signature fields when inserting an AssureSign Field, there are also two different kinds of Field Properties: one for the *Text*-type and one for the *Signature*-type.

Please find a brief instruction of Field Properties functionalities for the *Text*-type in CHAPTER 2.2.1 ASSURESIGN PROPERTIES-WINDOW FUNCTIONALITIES (FOR THE TEXT-TYPE) ON PAGE 13.

Please find a brief instruction of the Field Properties functionalities for the *Signature*-type in CHAPTER 2.2.2 ASSURESIGN PROPERTIES-WINDOW FUNCTIONALITIES (FOR THE SIGNATURE-TYPE) ON PAGE 15.

2.2.1 AssureSign Properties-window functionalities (for the *Text*-type)

Most of the properties in this window are the same as the Jot Blocks you can set when you directly create a document in AssureSign. These properties affect the document when signing it in AssureSign.
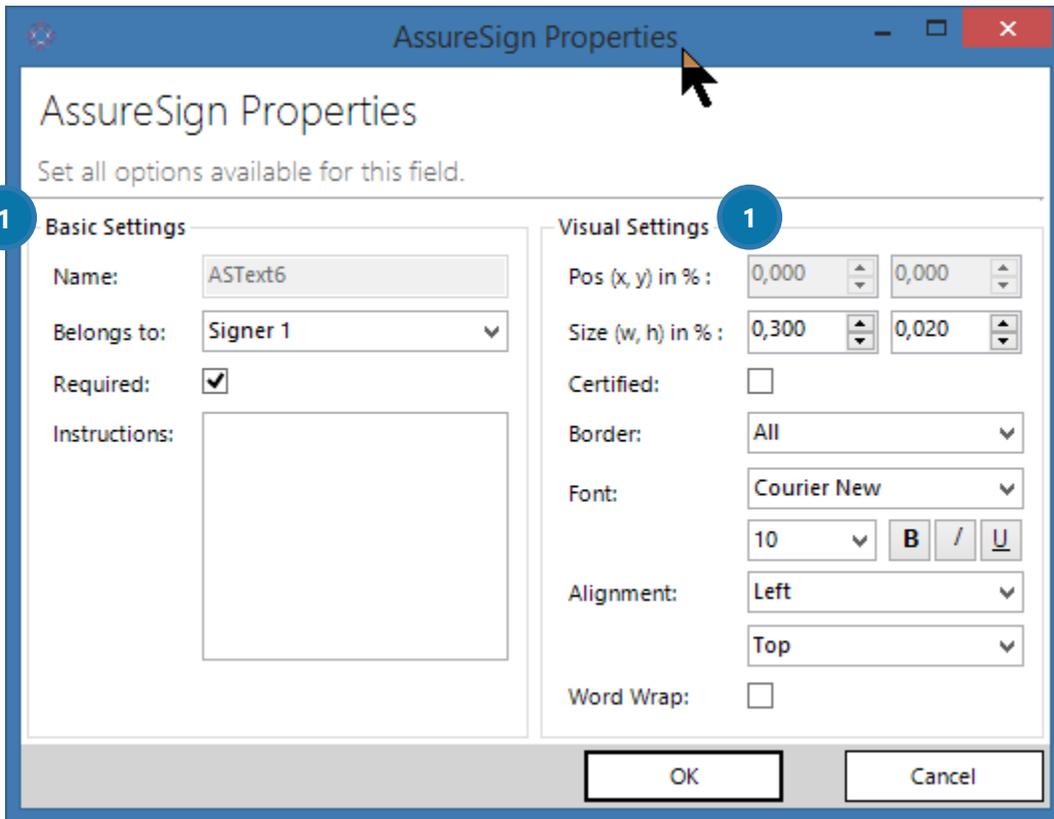

Figure 12: AssureSign Properties-window functionalities (for the Text-type)

❶ BASIC SETTINGS

NAME
Is the field-name in the DocumentsCorePack template.

BELONGS TO
Enables you to switch between different signers. Because there could be more than one signer, you need the possibility to switch between them. All possible signers will be shown here (even if in this example, it is only one). To add a new one or to delete the last one, simply use the corresponding entry.
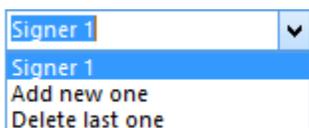

Figure 13: Select, add or delete signer

REQUIRED

The fields must be filled by the signer if the *Required*-box has been checked.

INSTRUCTIONS

Please insert the instruction text that will be shown in AssureSign here.

② VISUAL SETTINGS

POS (X, Y) IN %

Basically, the positions of the DocumentsCorePack fields in your DocumentsCorePack template are to be set here – but the feature has not been implemented yet.

SIZE (W, H) IN %

Usually, the predefined values from DocumentsCorePack should bring a good result here. But you can as well customize the Width (W) and Height (H).

> **PLEASE NOTE** The AssureSign application will enforce a minimum height and width in order to ensure that all elements match correctly into the document.

Width (W) must be a value between 0 and 1. This is calculated as the ratio of the width of the Jot Block to the overall width of the visible portion of the page in pixels: WIDTH = [JOT BLOCK WIDTH] / [PAGE WIDTH]

Height (H) must be a value between 0 and 1. This is calculated as the ratio of the height of the Jot Block to the overall height of the visible portion of the page in pixels: HEIGHT = [JOT BLOCK HEIGHT] / [PAGE HEIGHT]

CERTIFIED

A certified Jot Block visually distinguishes from other Jot Blocks. In order to certify a Jot Block simply check the *Certified* box.
Printed *meta-data* appears embedded around the signature data. This *meta-data* includes an *electronically signed* statement, a date/time stamp, an IP-address stamp and an internal Jot Block ID. If *Certified* is selected, the border will be set to *All*.

BORDER

Will create a thin black border either beneath the Jot Block if set to *bottom* or on all sides if set to *all*.

FONT

Will set the font properties

Alignment

Will set the alignments of the field.
Horizontal values are *left, center* or *right*.
Vertical values are *top, center* or *bottom*.

Word Wrap
Will wrap/unwrap the content

2.2.2   AssureSign Properties-window functionalities (for the *Signature*-type)
The Signature-type field basically contains the same functions as the Text field.

Plus, it offers one more functionality in the Visual Settings area.

INK COLOR
Can be changed from black to blue.

3   Tutorials ("How To's") - Classic & Simple Setup
This chapter provides you with helpful tutorials that show you how to work with AssureSign and/or DocumentsCorePack efficiently.

3.1   How do I merge a document in order to send it to AssureSign for 1 signer? (DocumentsCorePack side)

Open an account in Microsoft Dynamics 365 (CRM) and click on the **[Create Document]**-Button. This action opens the DocumentsCorePack (DCP) Dialog. For further information on the DocumentsCorePack Dialog, please have a look at the [DocumentsCorePack ServerBased documentation](#). Basically, the dialog allows you to select templates, like for example an AssureSign template.
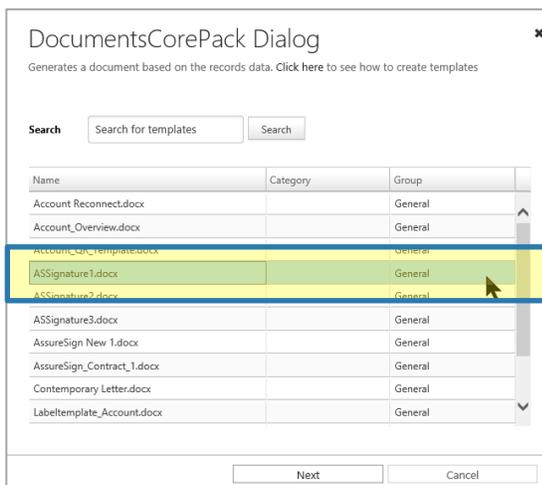
Figure 14: DocumentsCorePack dialog – Select an AssureSign template

Once you have selected a template, click on the **[Next]**-button. If you want to change the eMail recipient, you can do so here:
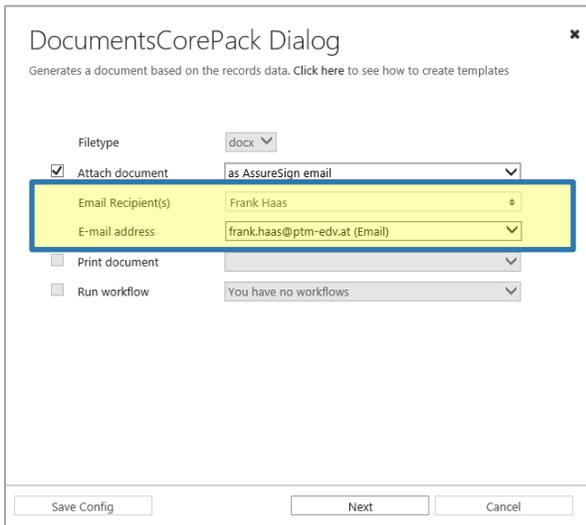
Figure 15: DocumentsCorePack dialog – Change eMail recipient

Finally, click on the **[Next]**-button and the document will be merged. You can re-check it here, before you send it to AssureSign.
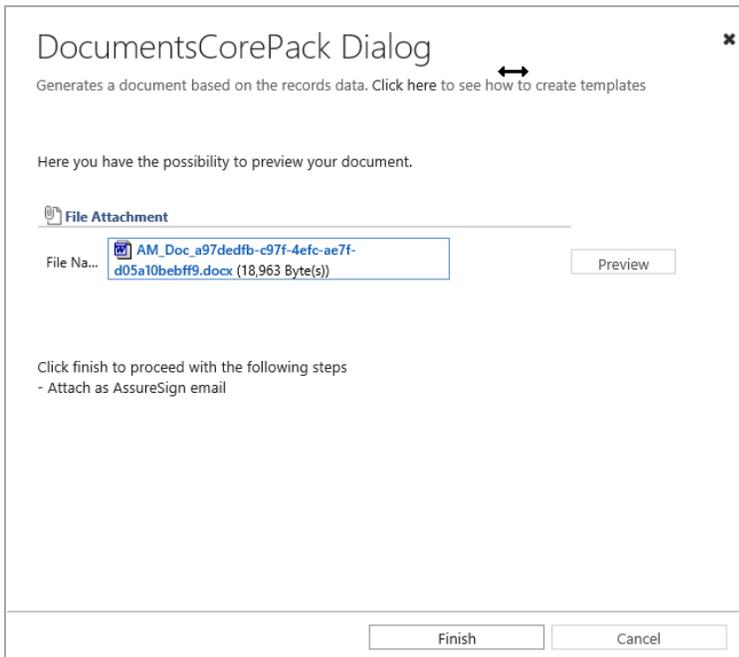

Figure 16: DocumentsCorePack dialog – Finish process

To finish, press the corresponding button and the document will be sent to AssureSign.

3.2 How do I merge a document and sent it to AssureSign for 1 signer? (AssureSign side)

This part shows how you or your customers/business partners can sign a document right within AssureSign. Everyone that should sign a paper via AssureSign receives an email that there is a document waiting for a signature.

In order to sign that particular document, you must open the link in the email you have received from AssureSign. Please agree to the terms and conditions and click on the *[Continue]*-button.
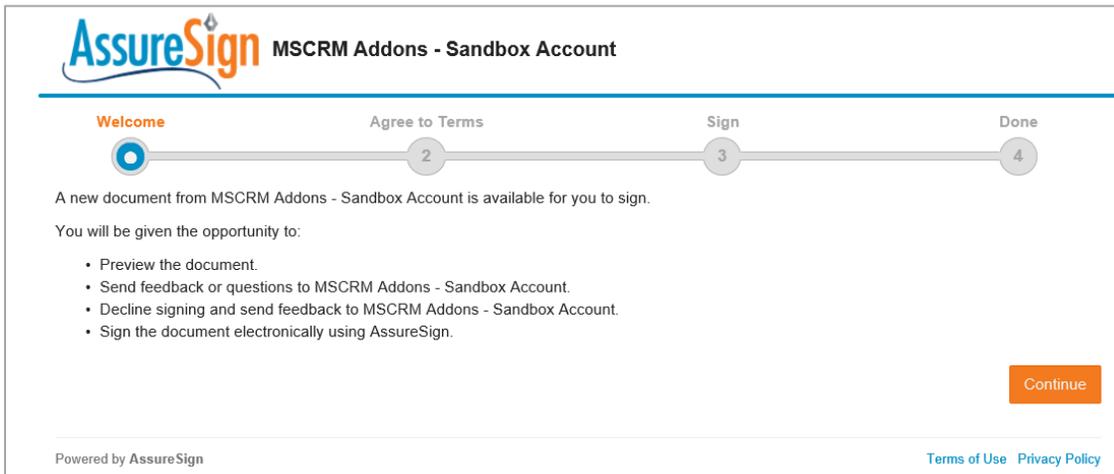
Figure 17: AssureSign signature process – agree to terms & conditions
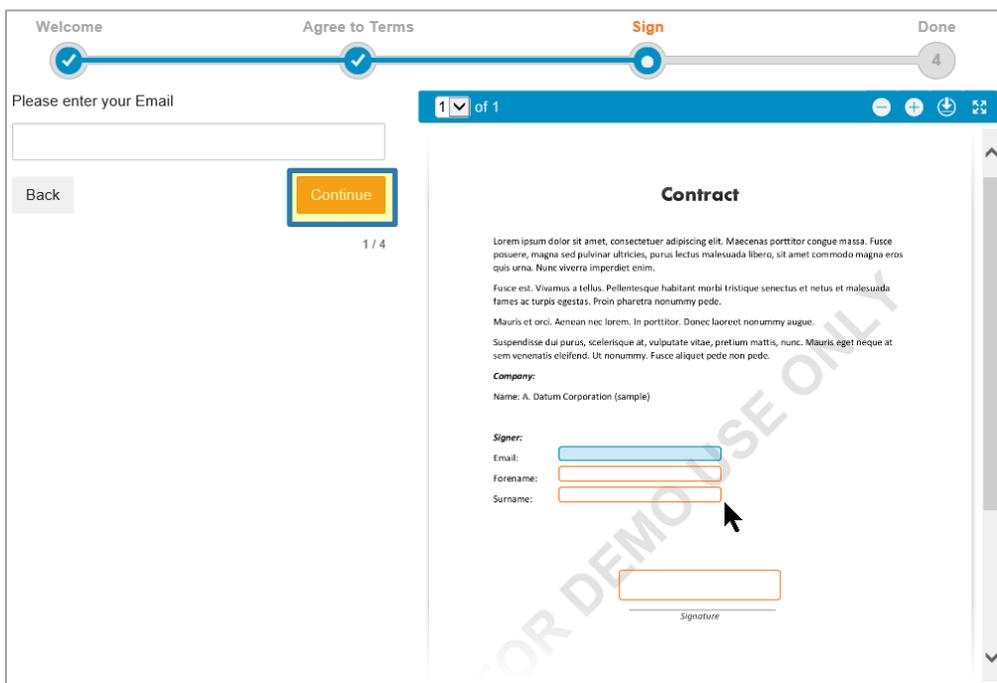
Figure 18: AssureSign signature process – fill out fields

Fill out each field. Please press on the **[Continue]**-button at the left side in order to jump from field to field.

Finally, sign the document.
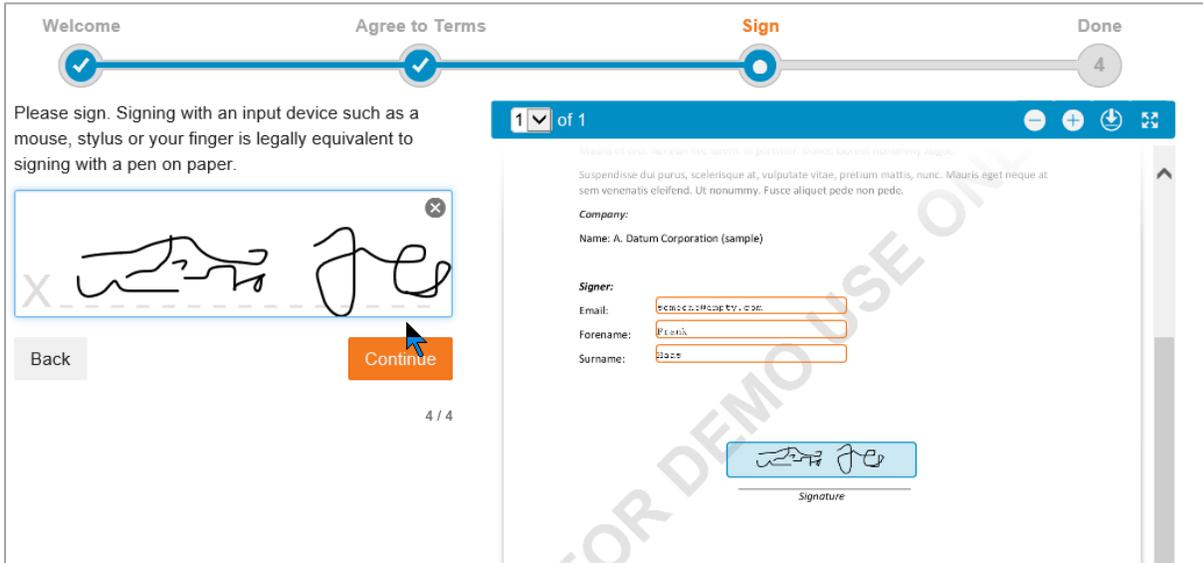
Figure 19: AssureSign signature process – sign document

You will also get an email including the signed document.
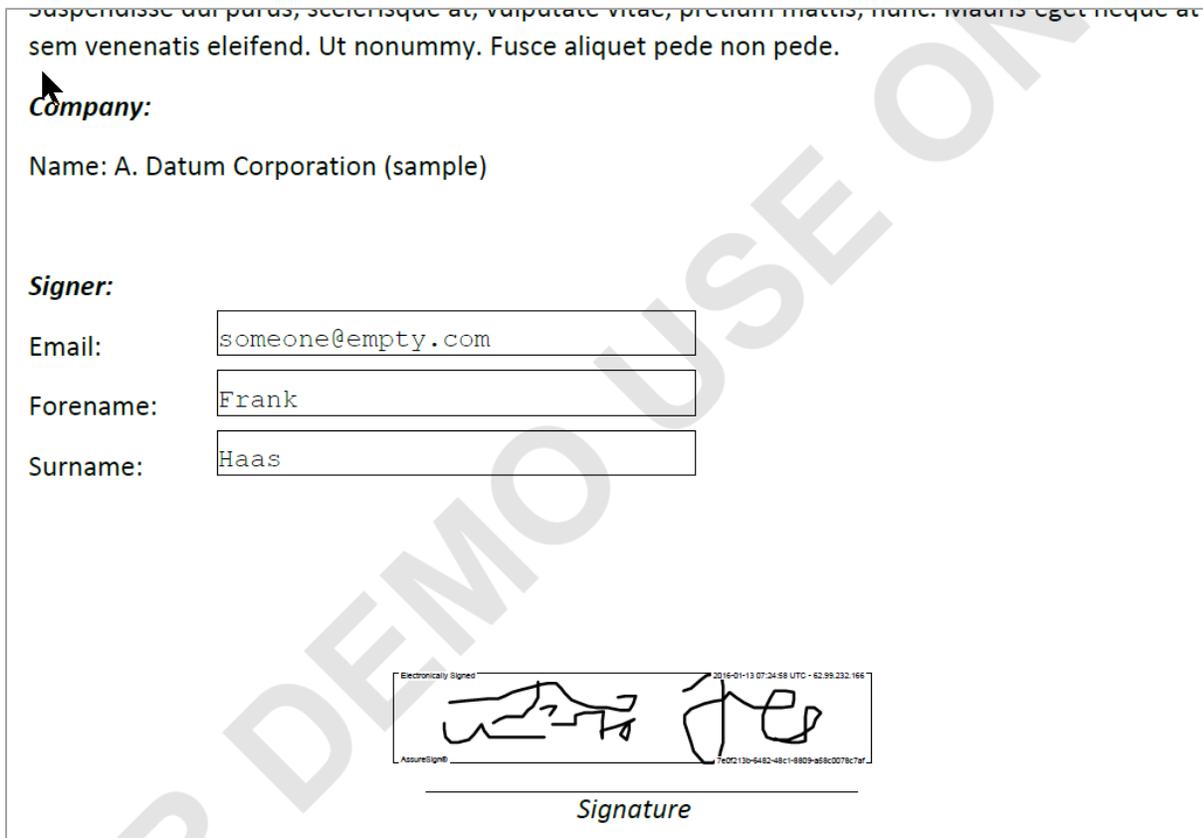
Figure 20: AssureSign signature process – signed document

3.3 How do I create a DocumentsCorePack template for AssureSign for 2 signers?

Imagine, you would like to create a DocumentsCorePack-Template for AssureSign for two signers. Let us pretend, you wanted to make sure that the person who has revised a certain document, has the possibility to sign it.

To do so, add some text at the end of the document and insert an AssureSign-Field type *Text* and another one with the type *Signature*.
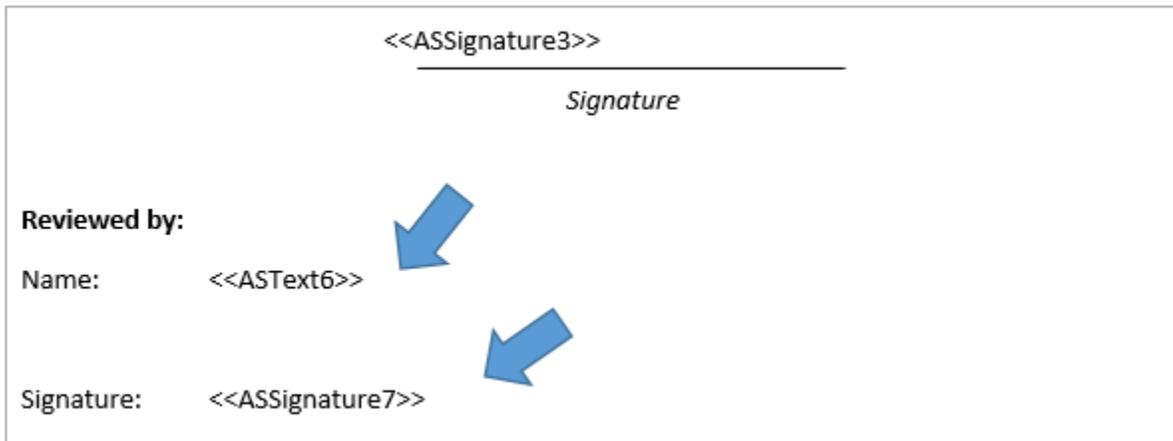
Figure 21: AssureSign signature process – template with

Now click on <<ASText6>> and open the properties-window with a click on *fields properties*. The default settings appear. For more information on the AssureSign properties, please have a look at CHAPTER 2.2 HOW TO SET THE PROPERTIES OF AN ASSURESIGN FIELD ON PAGE 12.
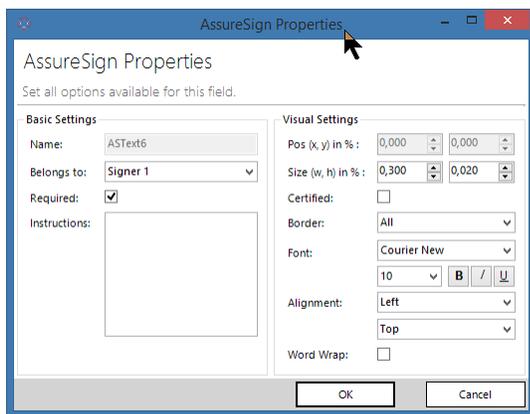
Figure 22: AssureSign signature process – AssureSign properties

Open the *Belongs to* – list box and select *Add new one…*
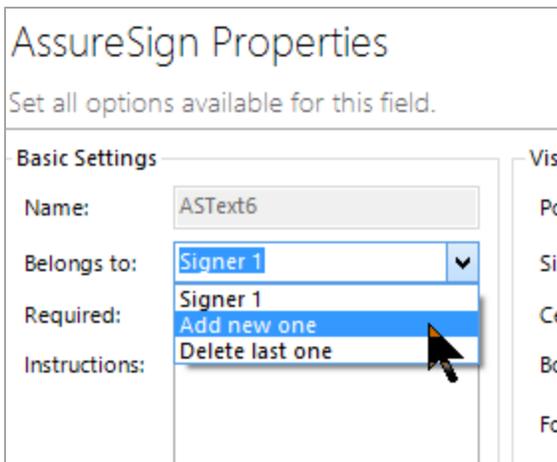
Figure 23: AssureSign signature process – Belongs to-box

Signer 2 will be created and selected.

Figure 24: AssureSign signature process – Belongs to-box Signer 2

Now open the properties of the Signature-field and select *Signer 2*.

Figure 25: AssureSign signature process – properties

The checkbox next to the *Certified*-field must not be checked!

After saving this Document to CRM ("Save Template" in the www.mscrm-addons.com-tab) we can use it.

3.4 How do I merge a document and send it to AssureSign for 2 signers?

Do the same as described in CHAPTER 3.1HOW DO I MERGE A DOCUMENT IN ORDER TO SEND IT TO ASSURESIGN FOR 1 SIGNER? (DOCUMENTSCOREPACK SIDE) ON PAGE 15. Next, sign in to AssureSign.
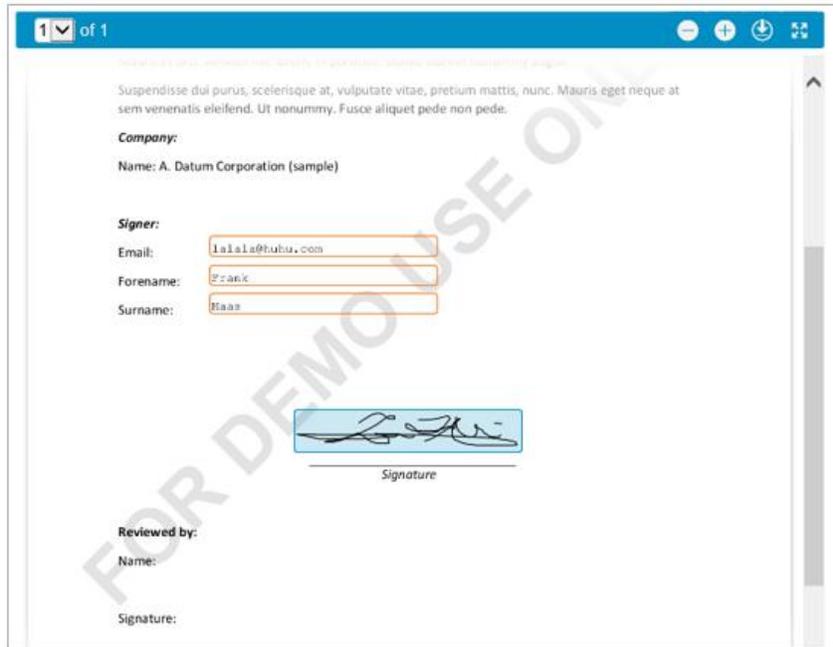
Figure 26: AssureSign signature process seen from the AssureSign side – Signer 1

At the bottom, you see the new fields. Because this is Signer 1 they are not visible yet. But after the customer has signed the document, the second Signer gets an email – and is able to sign the document:
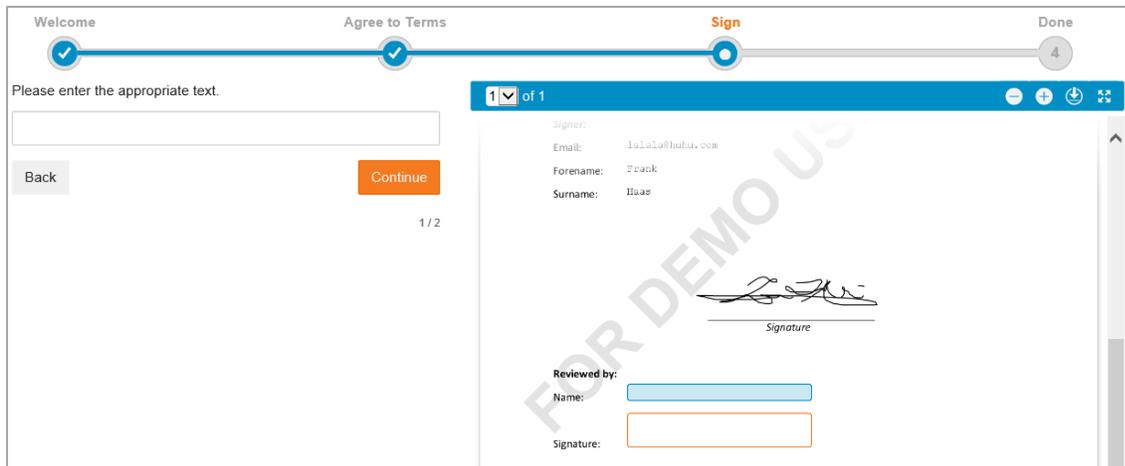
Figure 27: AssureSign signature process – Signer 2

As you can see now the new fields in this step are active and the fields of Signer 1 are filled.

In the next step, you will have to sign it:
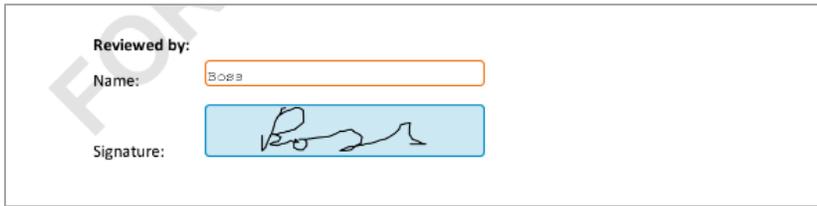
Figure 28: Signed document

And this is the result:
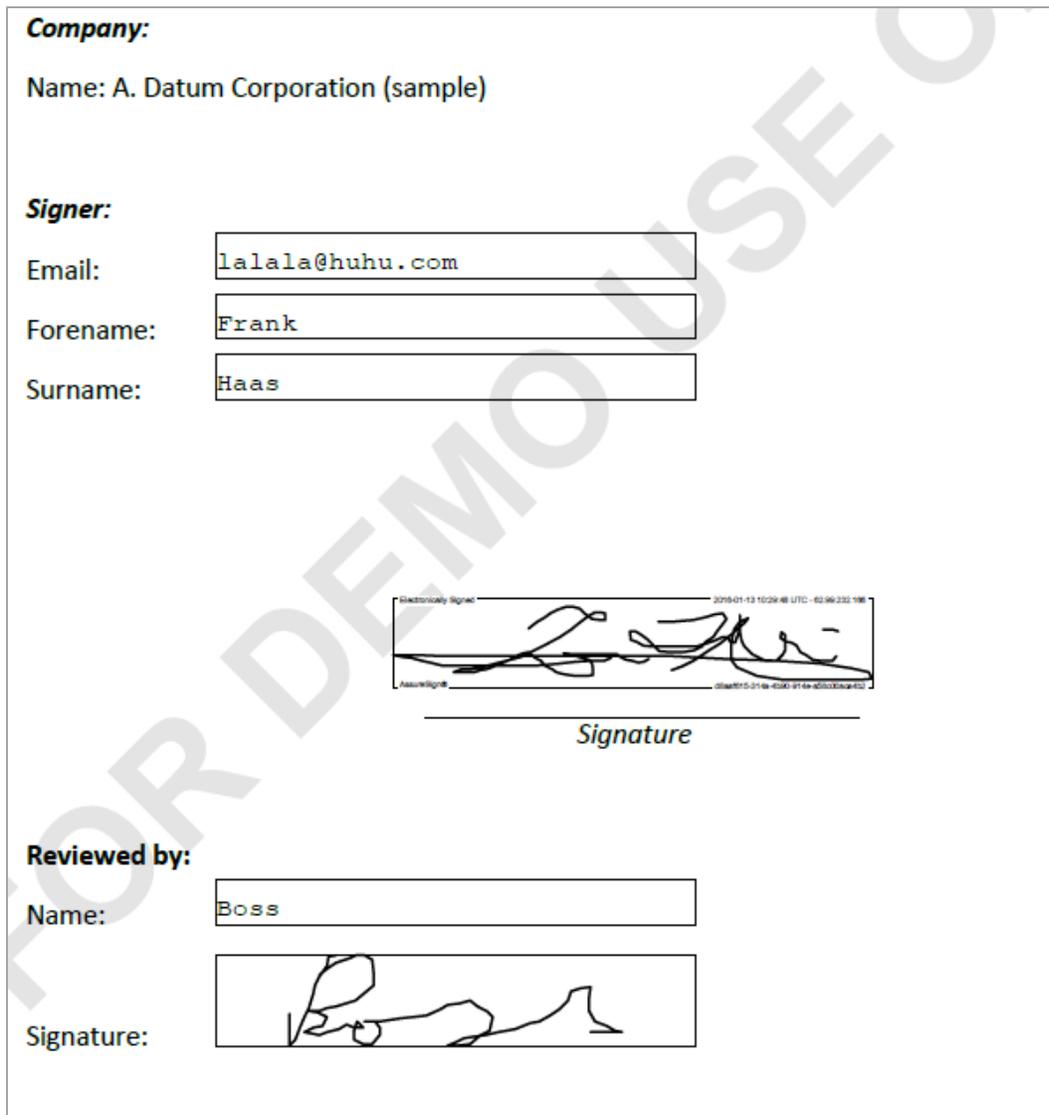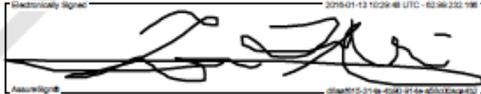
Figure 29: Signed document - result

4   List of figures

5   Contact

For further technical questions, please visit our blog http://blogs.mscrm-addons.com
or contact support@mscrm-addons.com.

For sales and licensing questions please contact office@mscrm-addons.com, or the corresponding contact
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