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Your company for MS-CRM ADD-ONS!

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

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October 2022

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 [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 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 [Installation Guide](#) 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 [AppSource](#). The Adobe Sign for Microsoft **On-Premises** package can be downloaded from the [Adobe Sign Integration page](#). 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**.



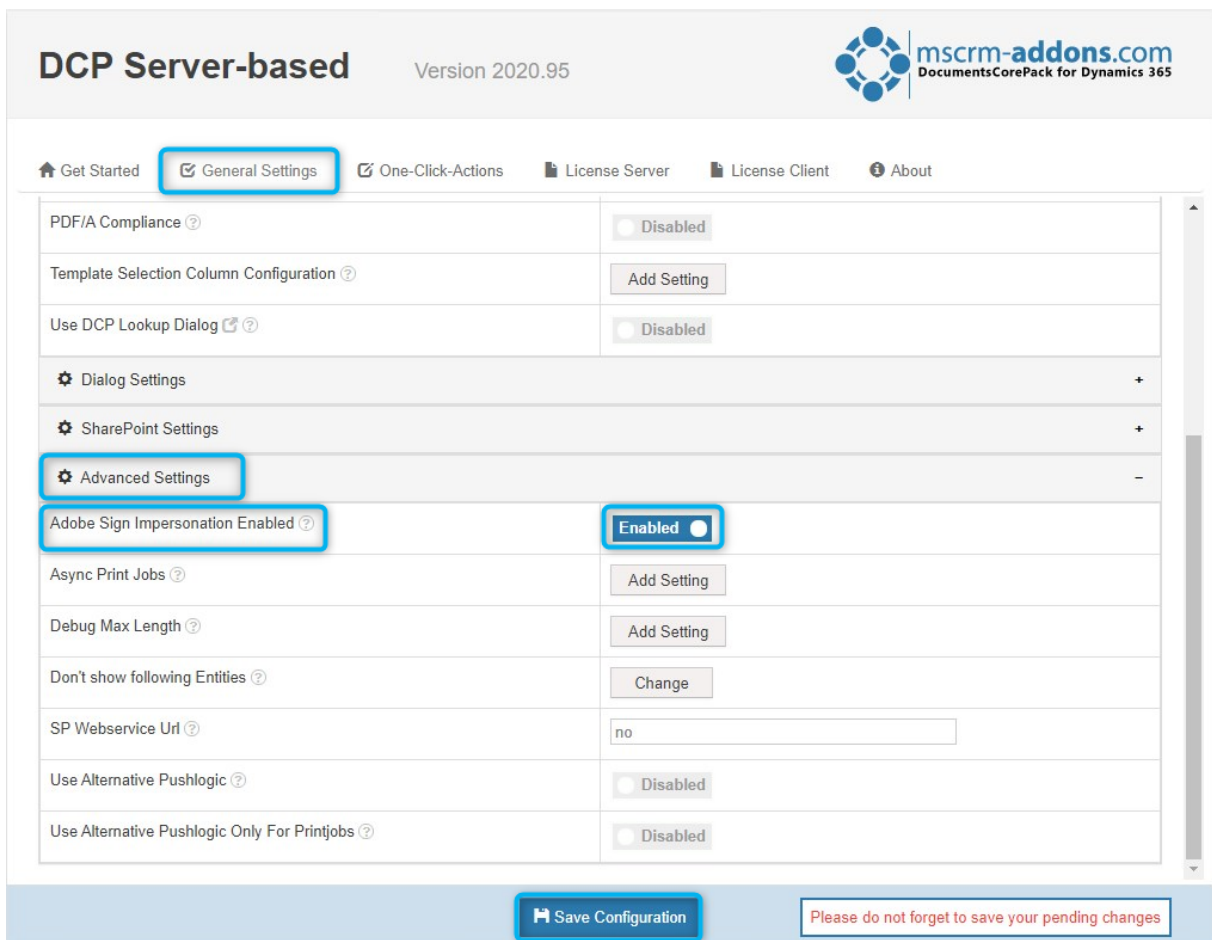
The DocumentsCorePack dialog only allows to select the option "Attach as AdobeSign e-mail" if Dynamics 365 user has "read-rights" for the AdobeSign settings entity (adobe\_integrationsettings).

Find more information about how to configure the security roles in the [Adobe Installation Guide](#) 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.



The screenshot displays the 'DCP Server-based' configuration interface, version 2020.95, with the 'General Settings' tab selected. The 'Advanced Settings' section is expanded, and the 'Adobe Sign Impersonation Enabled' option is set to 'Enabled'. Other settings include PDF/A Compliance (Disabled), Template Selection Column Configuration (Add Setting), Use DCP Lookup Dialog (Disabled), Dialog Settings, SharePoint Settings, Async Print Jobs (Add Setting), Debug Max Length (Add Setting), Don't show following Entities (Change), SP Webservice Url (no), Use Alternative Pushlogic (Disabled), and Use Alternative Pushlogic Only For Printjobs (Disabled). A 'Save Configuration' button and a warning message 'Please do not forget to save your pending changes' are visible at the bottom.

Setting	Value
PDF/A Compliance	Disabled
Template Selection Column Configuration	Add Setting
Use DCP Lookup Dialog	Disabled
Dialog Settings	+
SharePoint Settings	+
Advanced Settings	-
Adobe Sign Impersonation Enabled	Enabled
Async Print Jobs	Add Setting
Debug Max Length	Add Setting
Don't show following Entities	Change
SP Webservice Url	no
Use Alternative Pushlogic	Disabled
Use Alternative Pushlogic Only For Printjobs	Disabled

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 [Template Designer User Guide](#) 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.

mscrm-addons.com

 mscrm-addons.com  
Your company for MS-CRM ADD-ONS!

Work Order: <<msdyn\_name>> Type: <<msdyn\_workordertype\_msdyn\_name>>

Customer: <<msdyn\_serviceaccount\_name>>  
<<msdyn\_serviceaccount\_address1\_line1>>  
<<msdyn\_serviceaccount\_address1\_city>>,  
<<msdyn\_serviceaccount\_address1\_postalcode>>  
<<msdyn\_serviceaccount\_address1\_country>>

Service Description: <<msdyn\_primaryincidentdescription>>

Products:

Product	Qty	Amount
<<msdyn_name>>	<<msdyn_quantity>>	<<msdyn_totalamount>>
Subtotal:		<<msdyn_subtotalamount>>
Tax:		<<msdyn_totalsalestax>>
Total Amount:		<<msdyn_totalamount>>

1 {{Int\_es.:signer1:initials}}

Tasks:

Task	Est. Duration (min)	Actual Duration (min)
<<msdyn_name>>	<<msdyn_estimatedduration>>	<<msdyn_actualduration>>

{{Int\_es.:signer1:initials}}

Signatures:

{{Sig\_es.:signer1:signature}}

Approved by:

2 {{Sig\_es.:signer2:signature}}

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:

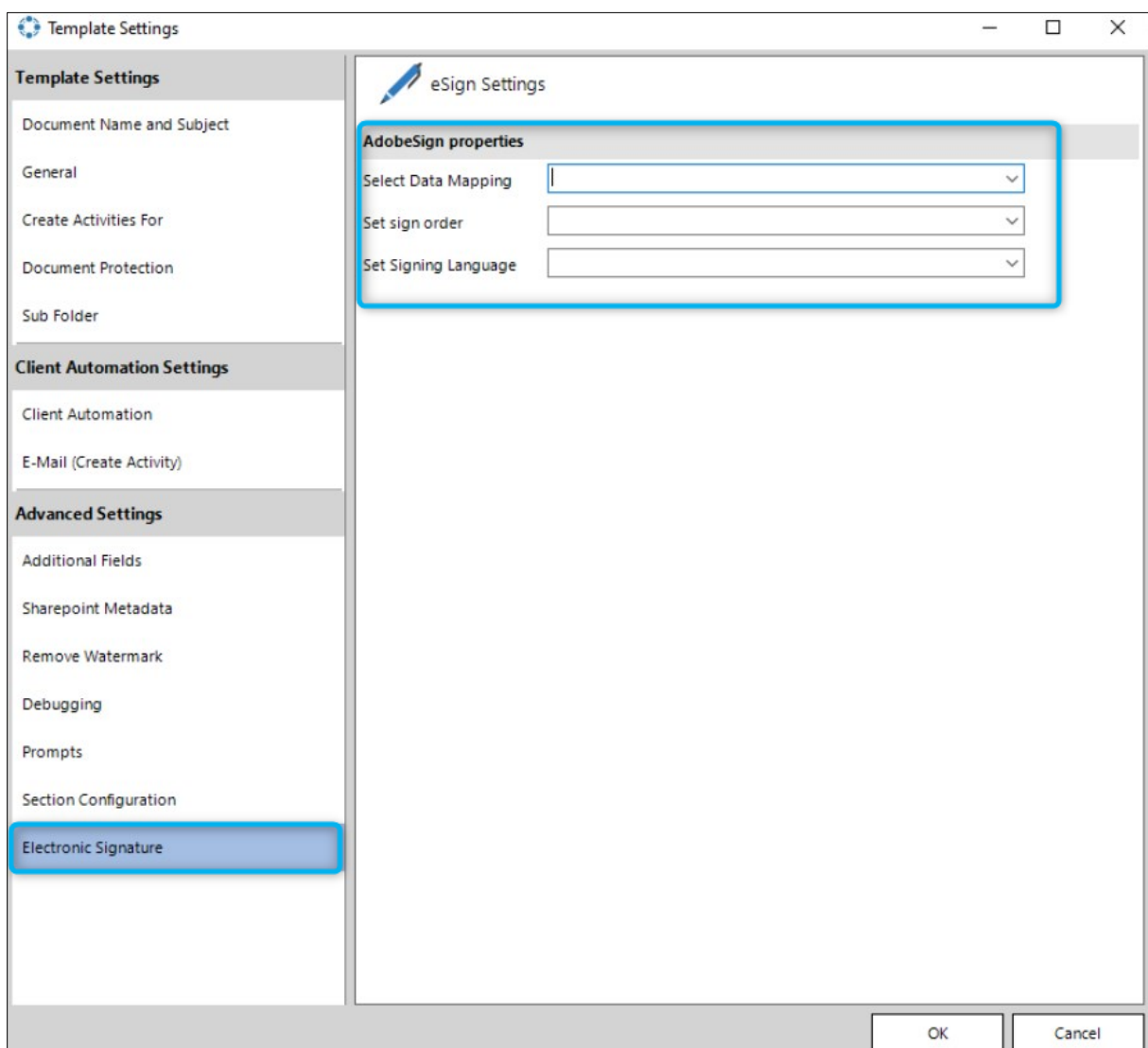


Figure 3: eSign settings



### 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 to be signed. The result can look like in the figure below.

The screenshot shows a document header with the website 'mscrm-addons.com' and its logo. The logo consists of a circular arrangement of colored dots (orange, yellow, green, blue) next to the text 'mscrm-addons.com' and the tagline 'Your company for MS-CRM ADD-ONS!'. Below the header, the document details are as follows:

- Work Order:** 00001
- Type:** Delivery
- Customer:** Fourth Coffee  
Carrera 1b No 10-01  
Bogota,  
Columbia
- Service Description:** Printer setup and configuration
- Products:**

Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$177.00
		Subtotal: \$1,177.00
		Tax: \$47.08
		<b>Total Amount: \$1,224.08</b>

A red rectangular box highlights the text: **Adobe Sign Test Document** and **Not for commercial use**. To the right of this box is a blue signature 'MD'.

Task	Est. Duration (min)	Actual Duration (min)
Setup	60	45
Configuration	150	150

Below the table is another blue signature 'MD'.

**Signatures:**

Codaclean Blanca  
Codaclean Blanca (User ID: 2024)

**Approved by:**

Michael Dole  
Michael Dole (User ID: 2024)

1 | Page

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.

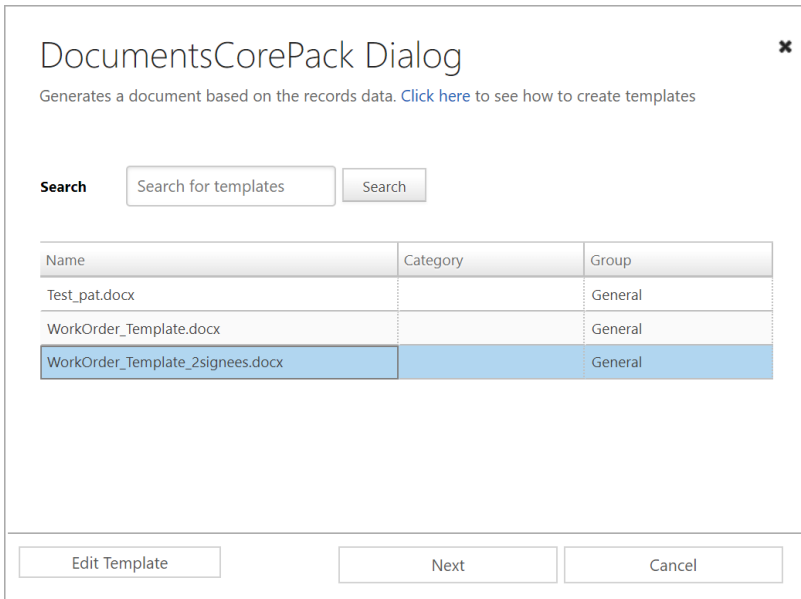


Figure 5: DCP Dialog – select your template

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.

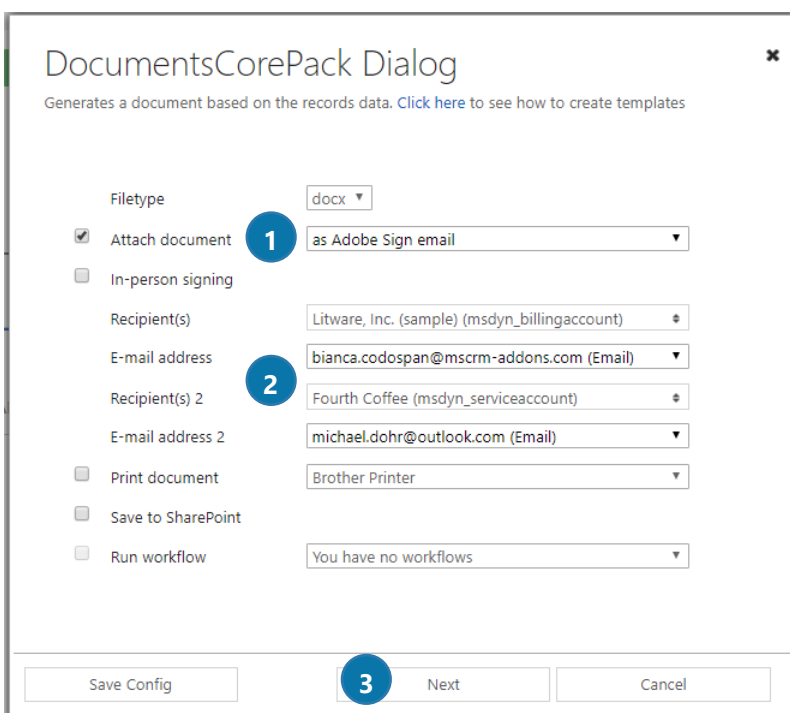


Figure 6: DCP Dialog – define how your document should be executed

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

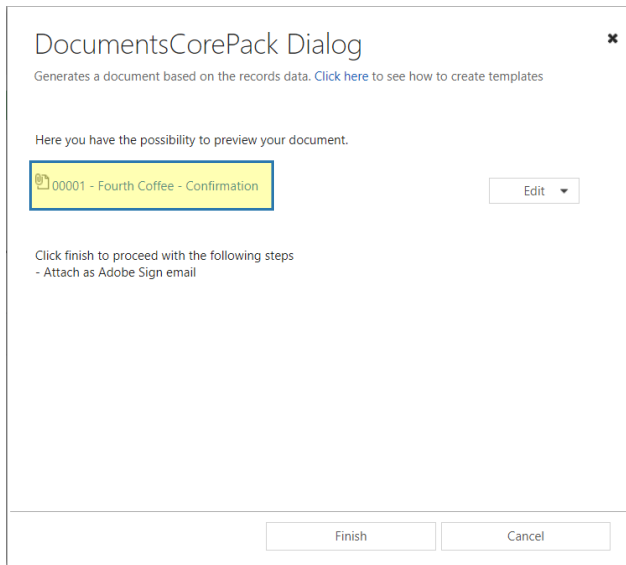


Figure 7: DCP Dialog – Preview document

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).

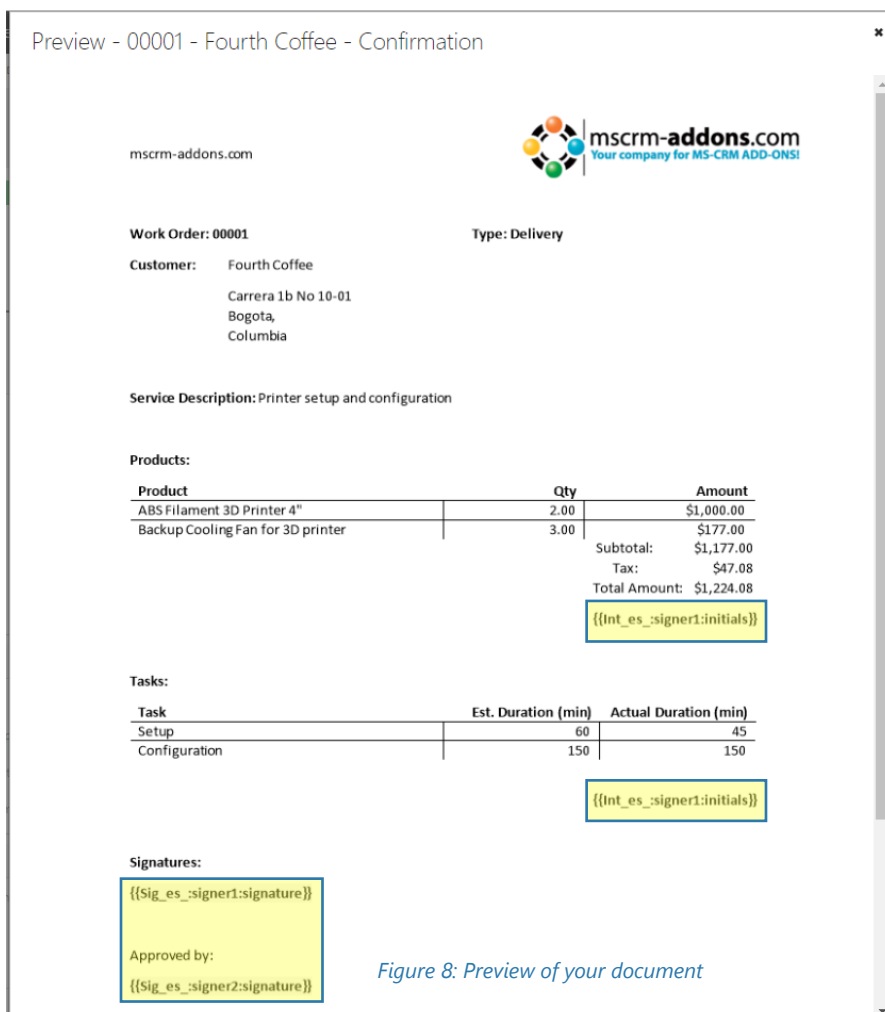


Figure 8: Preview of your document

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](mailto: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.

mscrm-addons.com



**mscrm-addons.com**  
Your company for MS-CRM ADD-ONS!

Work Order: 00001      Type: Delivery

Customer: Fourth Coffee  
Carrera 1b No 10-01  
Bogota,  
Columbia

Service Description: Printer setup and configuration

Products:

Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$177.00
		Subtotal: \$1,177.00
		Tax: \$47.08
		Total Amount: \$1,224.08

Adobe Sign Test Document  
Not for commercial use

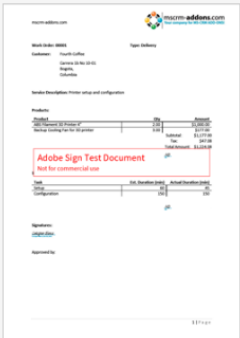
Task	Est. Duration (min)	Actual Duration (min)
Setup	60	45
Configuration	150	150

Signatures:  
Click here to sign

Approved by:

Figure 10: Sign the document

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.



You have successfully signed the agreement "[DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation".

It has now been sent to michael.dohr@outlook.com to sign.

[Download a copy](#)

[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).



**[DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation between mscrm-addons.com Corp., Codospan Bianca and Michael Dohr is Signed and Filed!**

From: Michael Dohr (mscrm-addons.com Corp.)  
To: Codospan Bianca, Michael Dohr and Michael Dohr

Attached is a final copy of [DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation.

Copies have been automatically sent to all parties to the agreement.

You can view [the document](#) in your Adobe Sign account.

**Why use Adobe Sign:**

- Exchange, Sign, and File 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.

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

 **mscrm-addons.com**  
Your company for MS-CRM ADD-ONS!


**Work Order: 00001** **Type: Delivery**

**Customer:** Fourth Coffee  
Carrera 1b No 10-01  
Bogota,  
Columbia


**Service Description:** Printer setup and configuration


**Products:**

Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$177.00
		Subtotal: \$1,177.00
		Tax: \$47.08
		Total Amount: \$1,224.08

**Adobe Sign Test Document**   
Not for commercial use

Task	Est. Duration (min)	Actual Duration (min)
Setup	60	45
Configuration	150	150



**Signatures:**  


1 | Page

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.

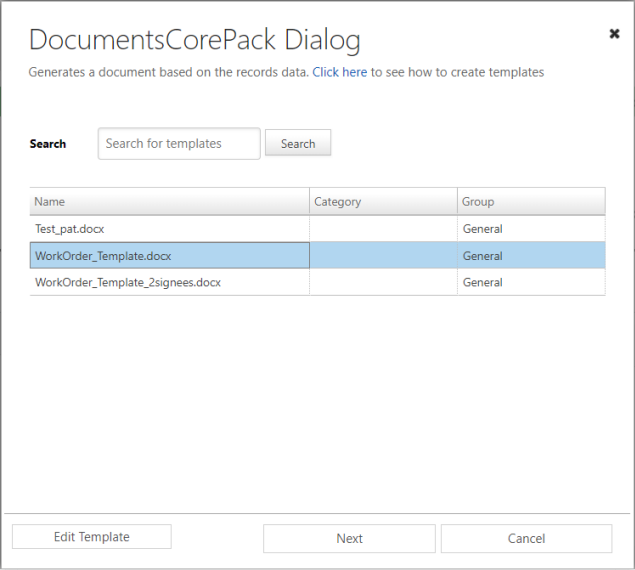


Figure 15: DCP Dialog – select template

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.

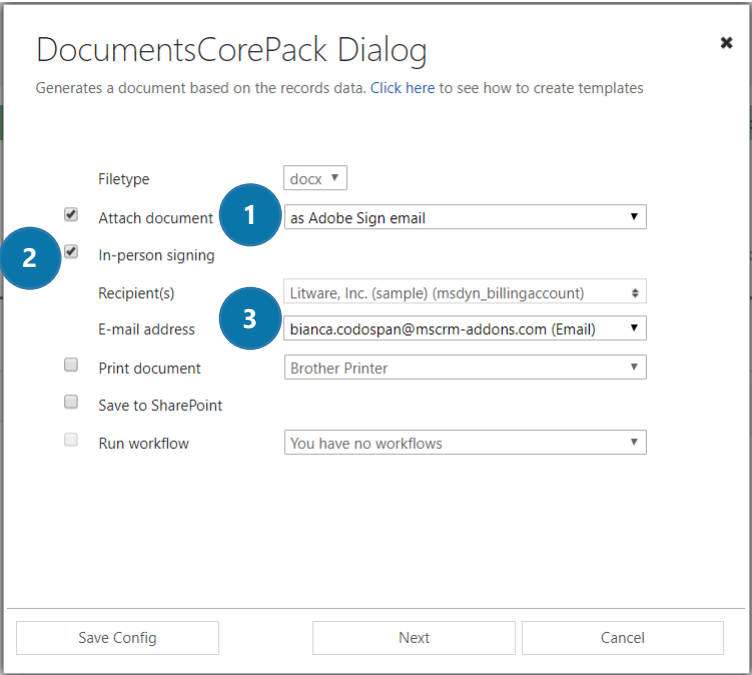


Figure 16: DCP Dialog – define how your document should be executed

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

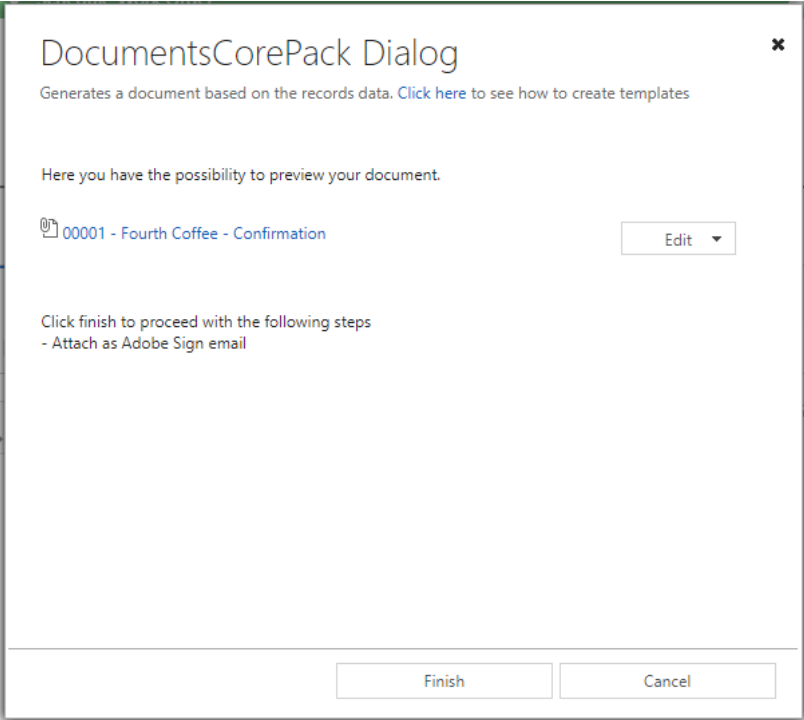


Figure 17: DCP Dialog – Preview or edit document

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

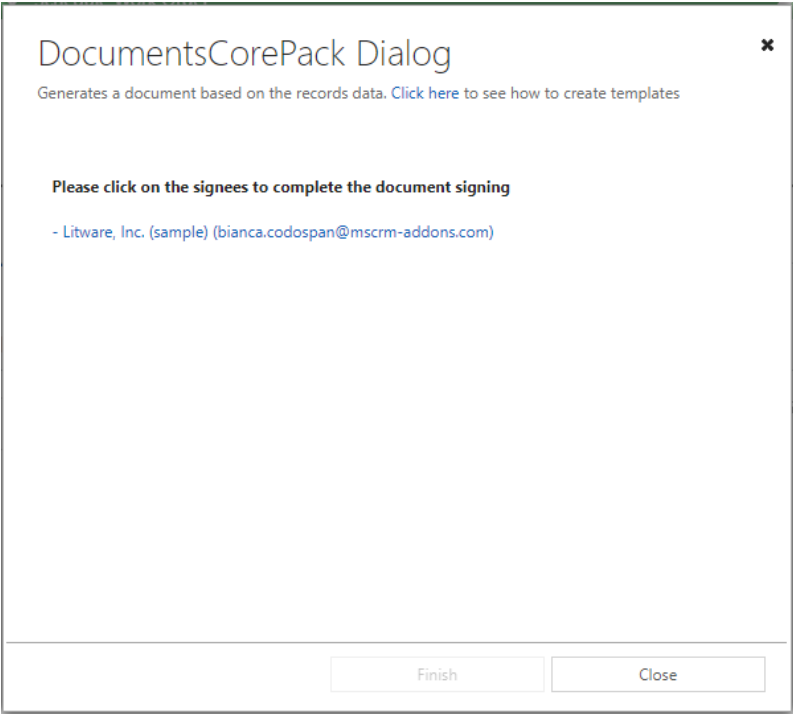


Figure 18: DCP Dialog – complete the document signing

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.



The screenshot shows an email from mscrm-addons.com with the following details:

- Work Order: 00001
- Customer: Fourth Coffee
- Service Description: Printer setup and configuration
- Products table:

Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$175.00
Subtotal:		\$1,175.00
Tax:		\$47.00
Total Amount:		\$1,222.00
- Task table:

Task	Est. Duration (min)	Actual Duration (min)
Setup	60	45
Configuration	120	120

The email body contains a link to an Adobe Sign document titled "Adobe Sign Test Document - Not for commercial use".

## 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, 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 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).

mscrm-addons.com  **mscrm-addons.com**  
Your company for MS-CRM ADD-ONS!

**Work Order: 00001** **Type: Delivery**

**Customer:** Fourth Coffee  
Carrera 1b No 10-01  
Bogota,  
Columbia

**Service Description:** Printer setup and configuration

**Products:**


Product	Qty	Amount
ABS Filament 3D Printer 4"	2.00	\$1,000.00
Backup Cooling Fan for 3D printer	3.00	\$177.00
		Subtotal: \$1,177.00
		Tax: \$47.08
		<b>Total Amount: \$1,224.08</b>

Adobe Sign Test Document

Not for commercial use

Task	Est. Duration (min)	Actual Duration (min)
Setup	60	45
Configuration	150	150

**Signatures:**

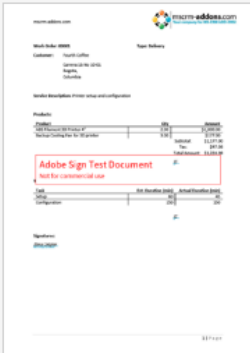
 \_\_\_\_\_

1 | Page

I agree to the [Terms of Use](#) and [Consumer Disclosure](#) of this document [Click to Sign](#)

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.



You have successfully signed the agreement "[DEMO USE ONLY] 00001 - Fourth Coffee - Confirmation".

Copies will be e-mailed to all parties.

[Download a copy](#)

[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

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

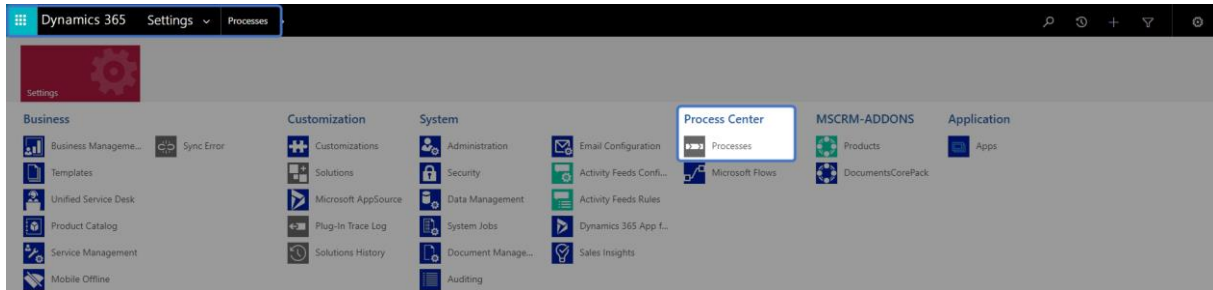


Figure 22: Dynamics 365 > Settings > Processes

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

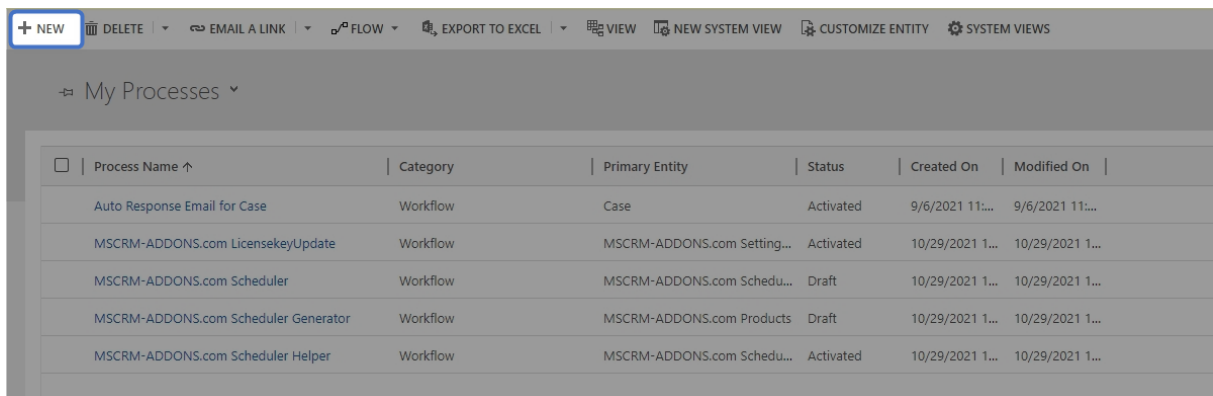


Figure 23: Add new process

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, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: \*

Category: \*  Entity: \*

Run this workflow in the background (recommended)

We recommend using [Microsoft Flow](#) instead of background workflows. [Click here](#) to start building Flows!

Type:  New blank process  
 New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owner
[Empty table body]		

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.

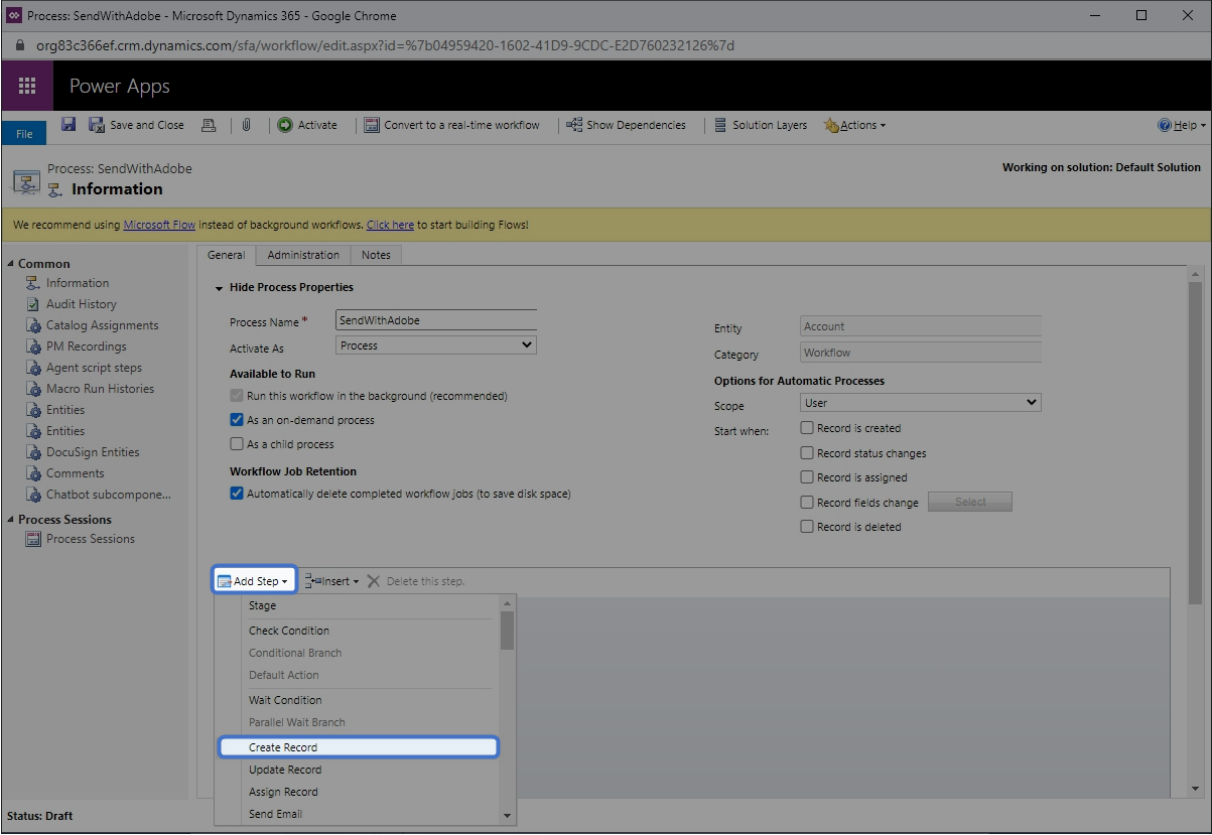


Figure 25: Add step

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.

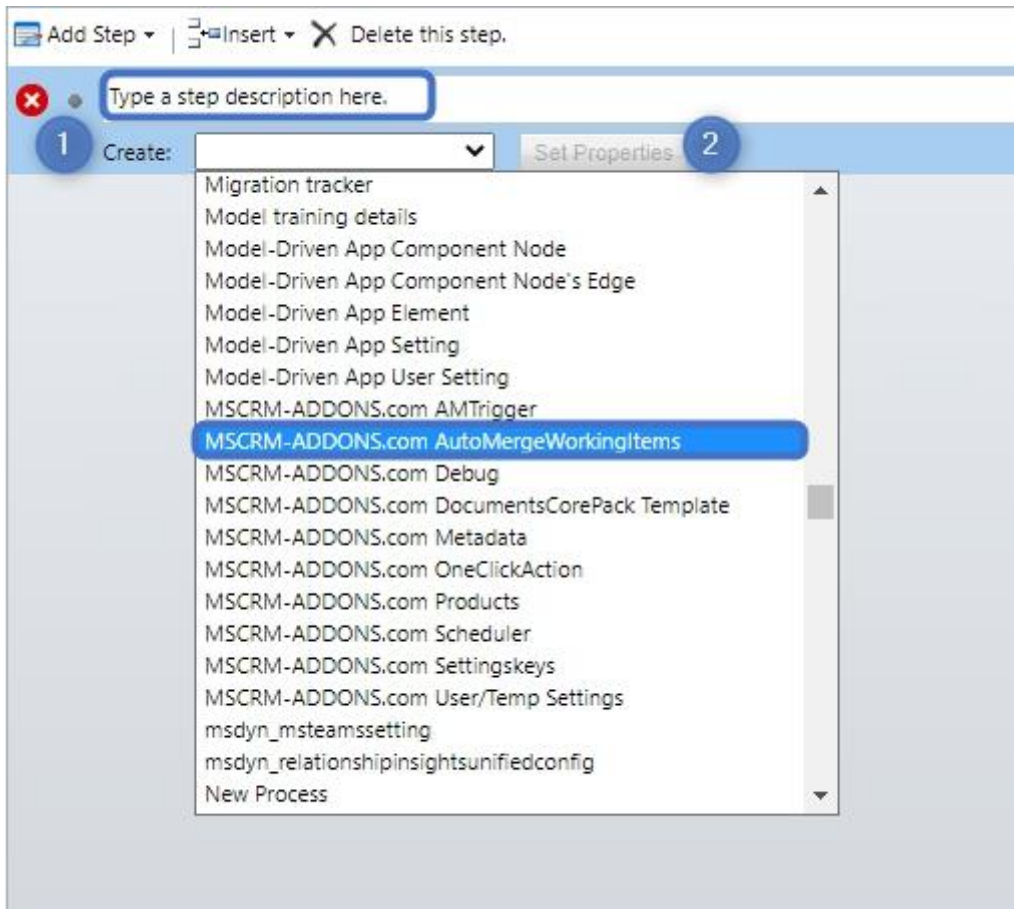


Figure 26: *MSCRM- ADDONS.com AutoMergeWorkingItems*



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

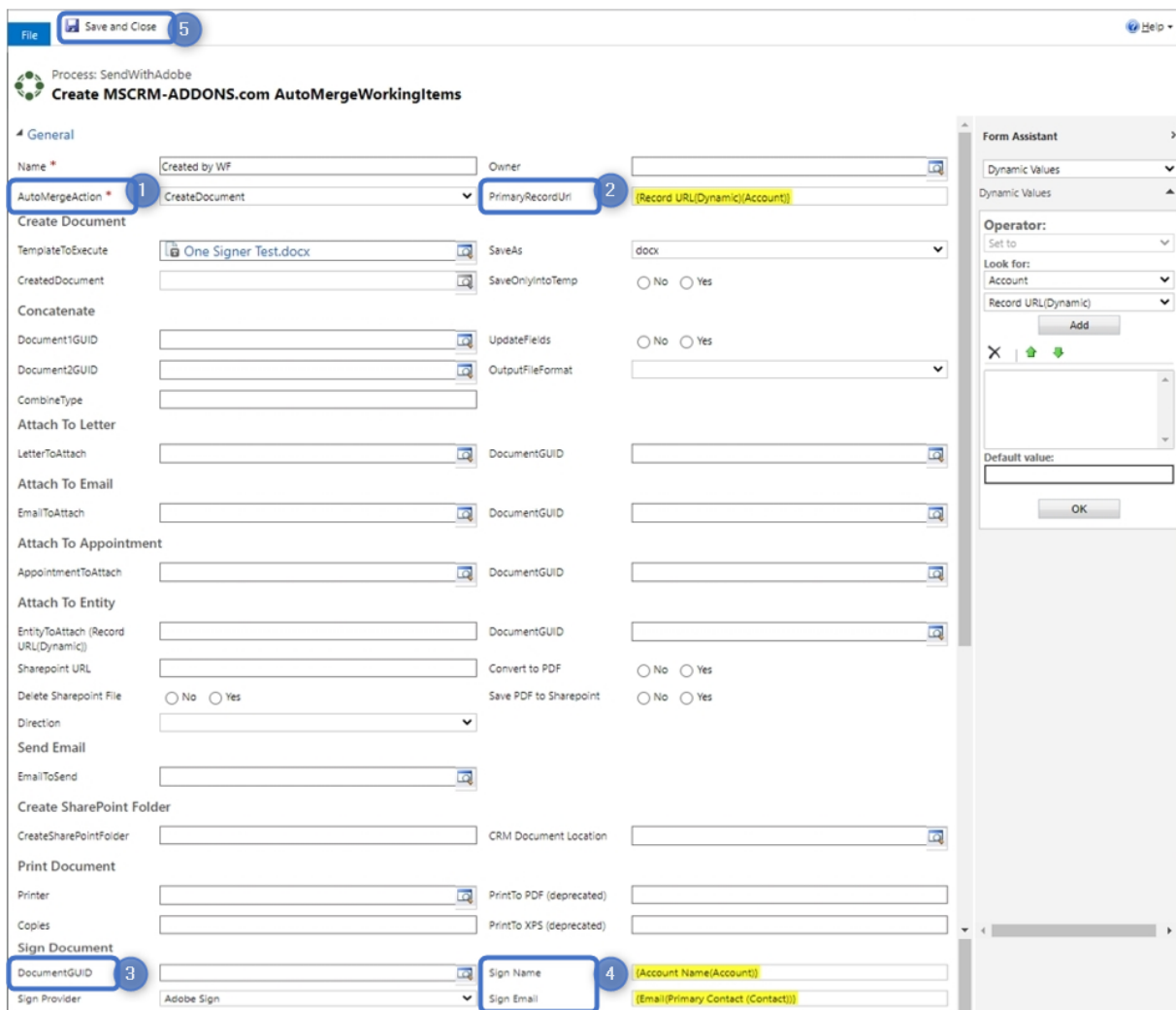


Figure 27: Set properties

- 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.

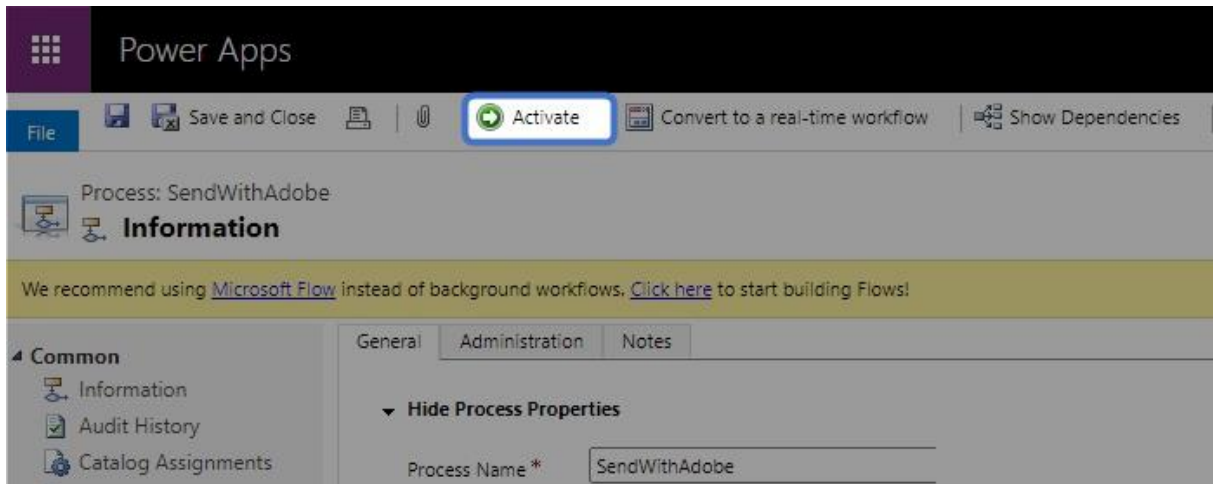


Figure 28: Activate Workflow

### 3.4 How to set a signing order for Adobe Sign

An electronic signature is data associated with electronic information 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 electronic documents. From a technical point of view, the electronic signature fulfills the same purpose as a handwritten signature on paper documents.

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

**Step 1:** Open a Word document and navigate in the menu bar to [www.mscrm-addons.com](http://www.mscrm-addons.com) and click on "Insert MailMerge Fields".

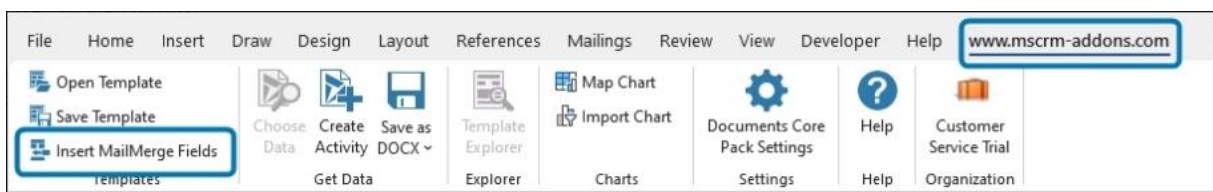


Figure 29: Open TemplateDesigner

**Step 3:** The "Template Settings"-window pops up. Navigate to the group ① "Electronic Signature", find the option ② „Set sign order" and select ③ "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.

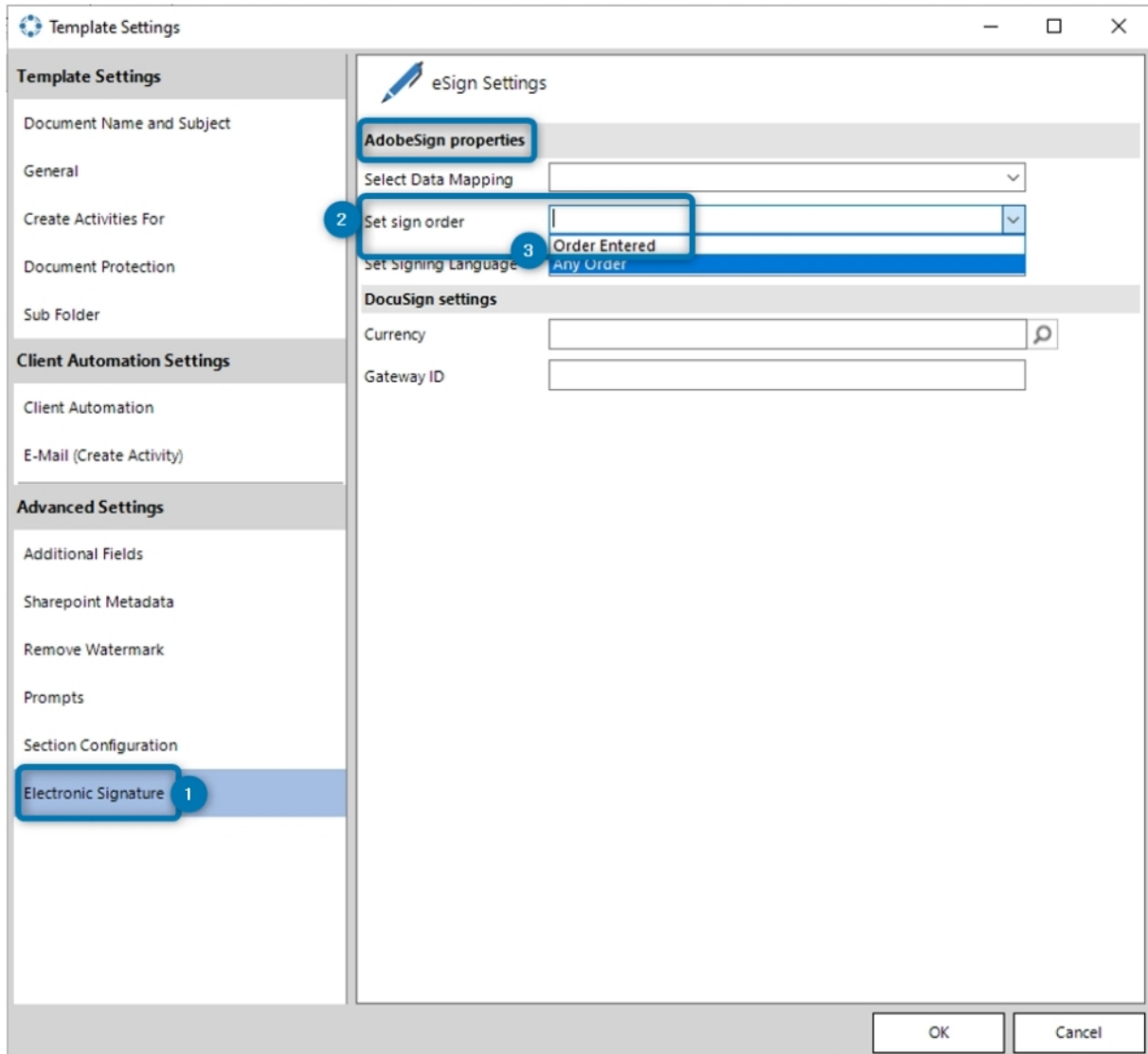


Figure 30: Set Sign Order

**Step 3:** Save the template. Then start the signing process and send it to Adobe.

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