Adobe Sign for Microsoft Dynamics 365 CRM

Installation Guide

v8

Last Updated: March 13, 2019

Contents

Overview

Adobe Sign offers a plug-and-play integration solution with Microsoft Dynamics CRM. This integration provides the following benefits:

- Accelerates the quote-to-cash process by sending agreements—such as contracts and sales documents—from Dynamics with one click
- Automatically merges data from Dynamics entities—such as accounts and contacts— into agreements and pushes data gathered from signers during the signing process back to Dynamics
- Enables mobile functionality via the Sales Hub (for installations on Dynamics 365 9.x and later)
- Makes it easy for recipients to sign anywhere, anytime, on any device
- Makes it possible to track documents sent out for signature from within Dynamics
- Eliminates manual steps across the entire process

This document is expressly for Microsoft Dynamics 365 CRM 8.2 and beyond.

Please refer to the v6 installation guide if you are using:

- Dynamics CRM 2016 Online and On-Premise
- Dynamics 2015 Update 2
- Dynamics 2013 Service Pack 1, Update 4

You can obtain the Adobe Sign for MS Dynamics v6 package here.

The scope of this document is focused on a new installation of the Adobe Sign solution. If the solution is already installed, and you are looking to upgrade the solution to the newest version, please refer to the Upgrade Guide.

Prerequisites

- Microsoft Dynamics 365 CRM 8.2 or later
- Verify the correct userID (email address) is designated as an administrator in the Adobe Sign system
- Provide all the owned domains that your users could be using in their email addresses (Do not include public use domains like gmail.com, yahoo.com etc.)
- Obtain a list of all users in the Adobe Sign system using your owned domains
- Once obtained, you may need to request valid users to be moved into your CRM linked Adobe Sign account
- It is vital that the user email in Adobe Sign match the primary email of the CRM user. In the event where it is not, the Adobe Sign email value should be changed.

Within the Dynamics environment there are a couple of items to take note of:

- **Licensing -** Adobe Sign Users and Administrators need to be assigned with **read/write** CRM Cal Licensing.
- **File Limitations** – The file upload size limit is configurable in CRM (default value is 5 MB). Users get an error if they try to attach a file larger than the configured value.
- If the signed PDF is larger than the configured value, Dynamics prevents the file from attaching to the parent (or mapped) entity.

Obtaining the Package

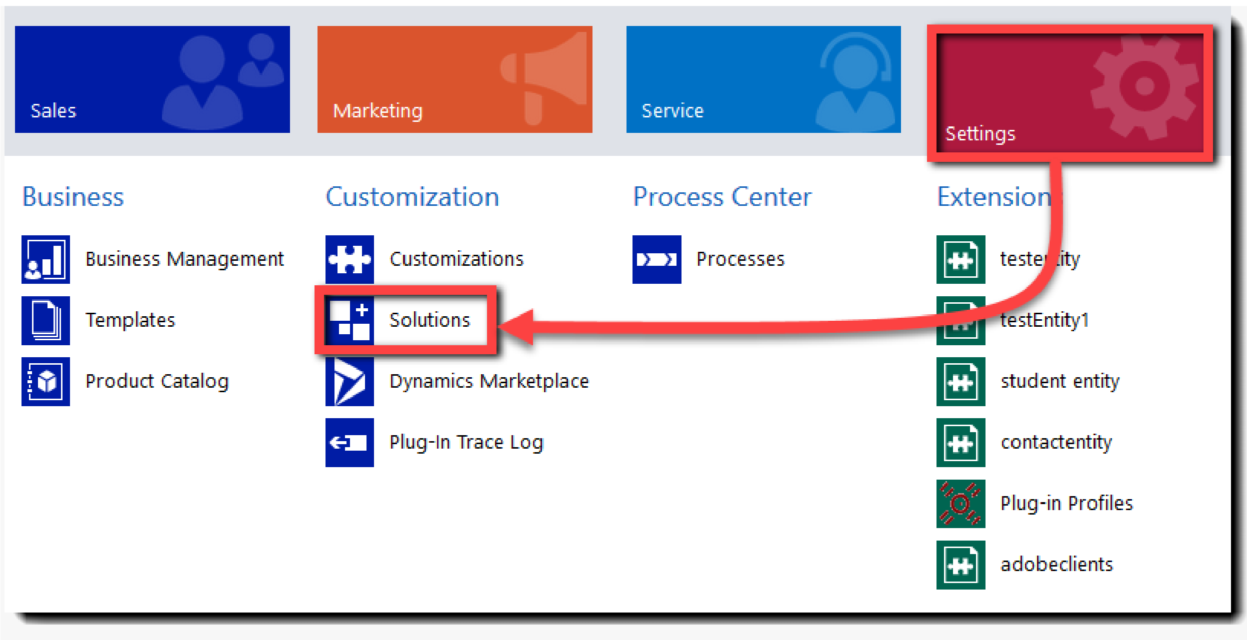
To obtain the current *Adobe Sign for MS Dynamics 365 Online* package from the Microsoft store. The *Adobe Sign for MS Dynamics On-Premises* package can be downloaded from the Adobe Sign integrations page.
You will also be able to review release notes, known issues and additional install/user guide information on the Adobe Sign integrations page. If you have any questions or concerns about/during the installation process, please contact your Customer Success Manager.

Installing the package

Installing the Microsoft Dynamics On-Premises package

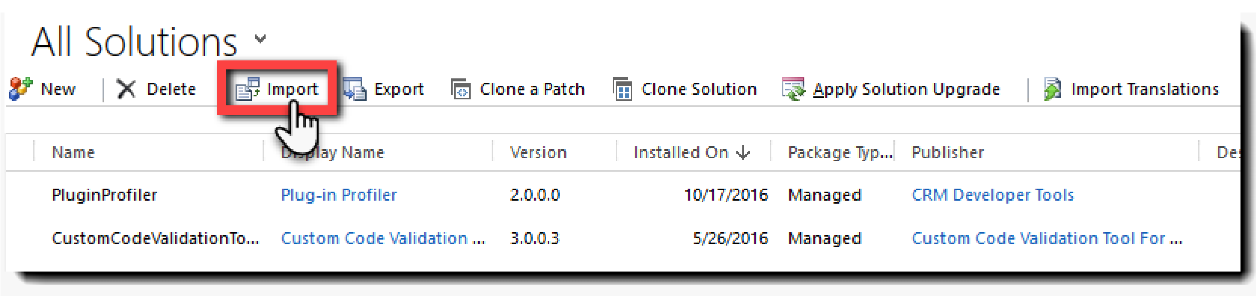
Log in to your Dynamics CRM environment as an Administrator

- Navigate to **Settings** > **Solutions**



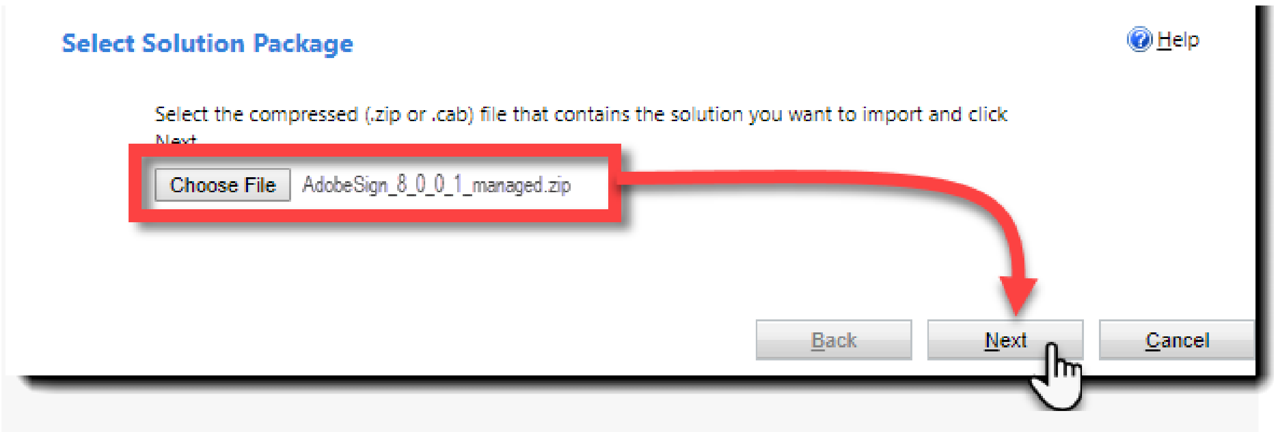
The *All Solutions* page loads:

- Click the **Import** icon



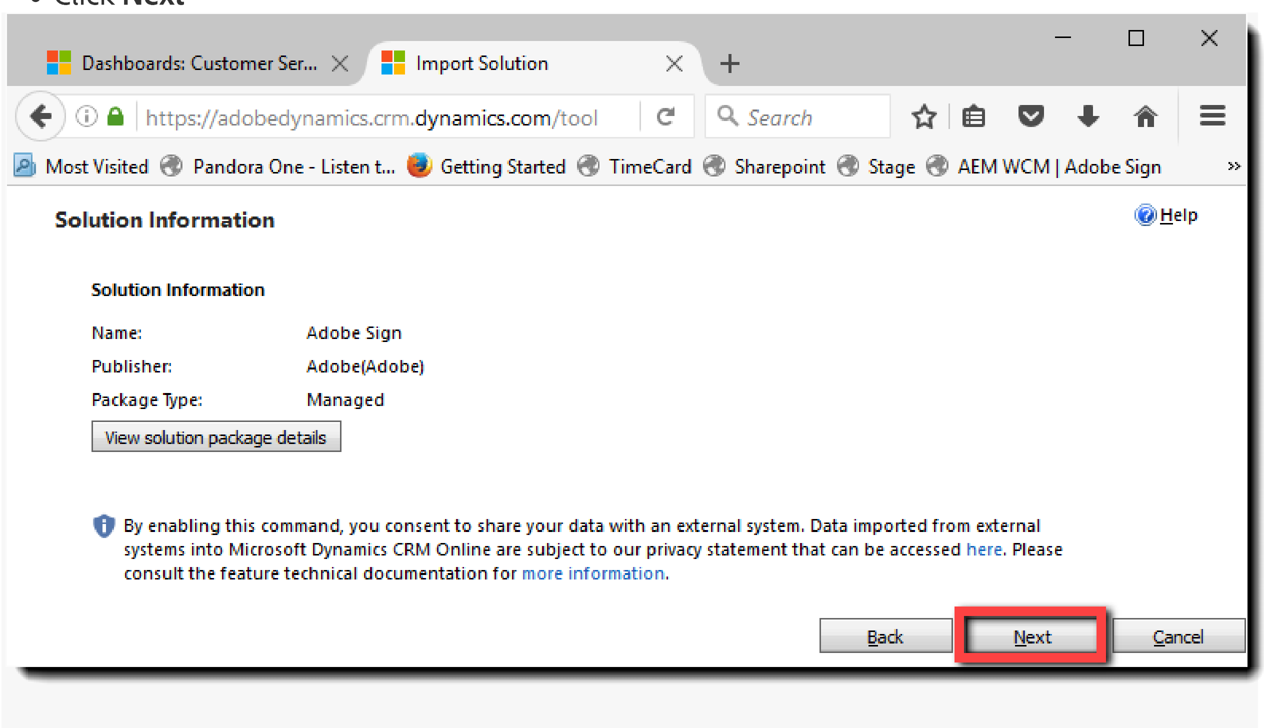
The *Select Solution Package* page loads:

- Browse to the Adobe Sign v8 .zip file that you downloaded
- Click **Next**



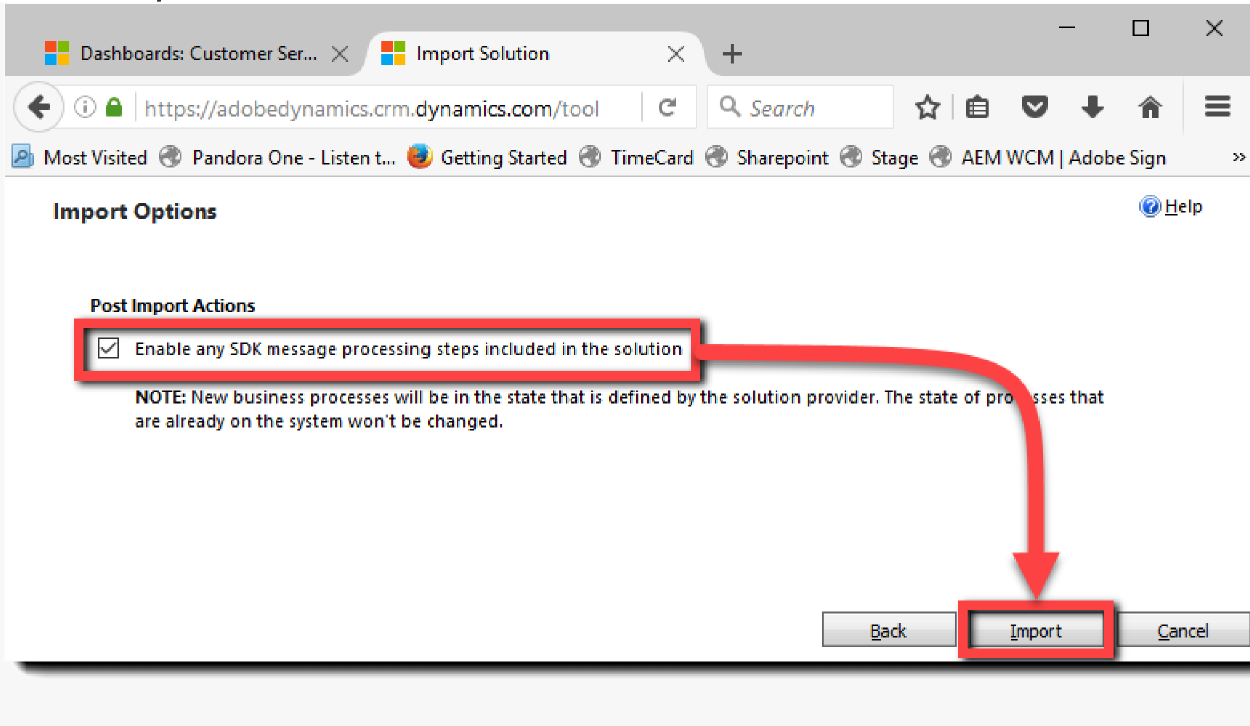
The *Solution Information* page loads:

- Click **Next**



The *Import Options* page loads:

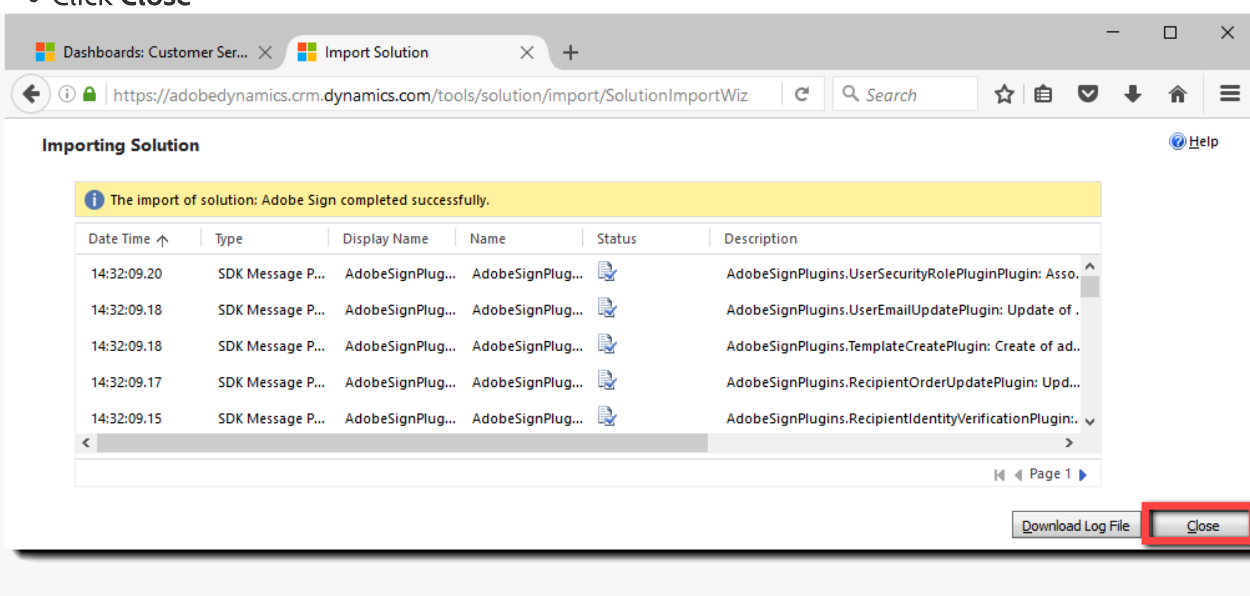
- Ensure that the *Enable any SDK message processing steps…* option is checked
- Click **Import**



The *Importing Solution* page loads and imports the package.

This process may take a few minutes. Once the process is completed, you should receive a success message.

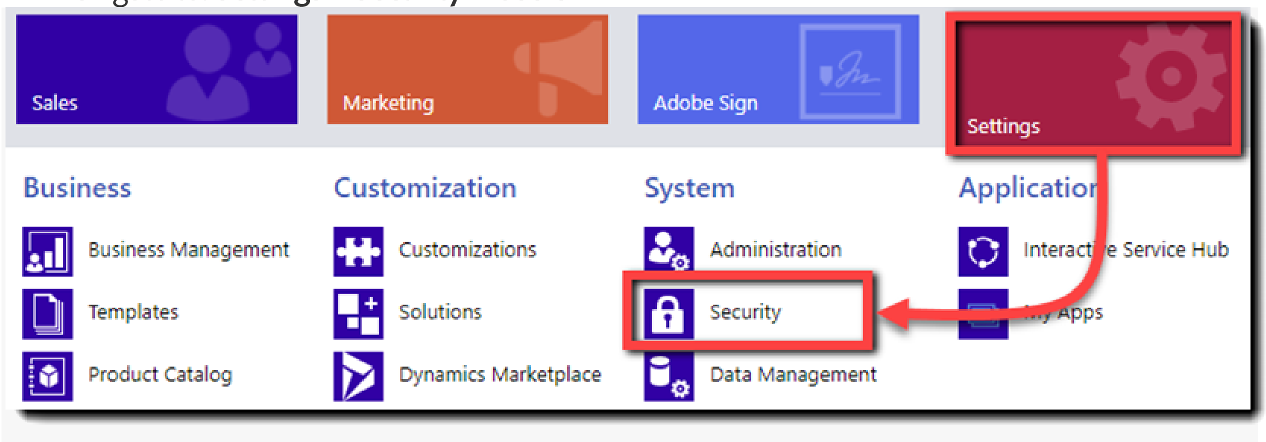
- Click **Close**



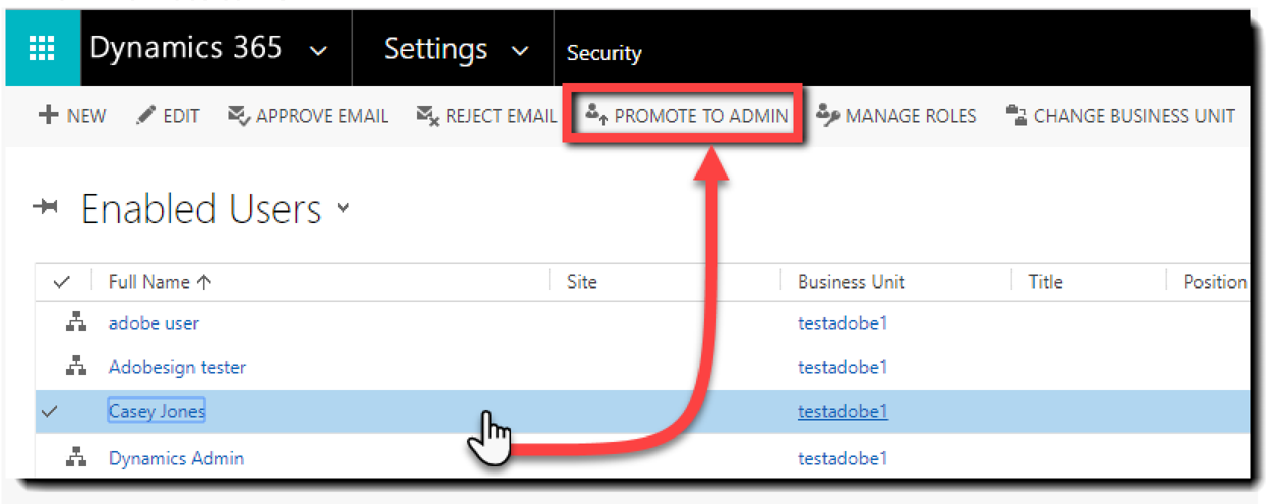
Installing the Microsoft Dynamics Online package

The online version of the package is installed from Microsoft's *AppSource* store:

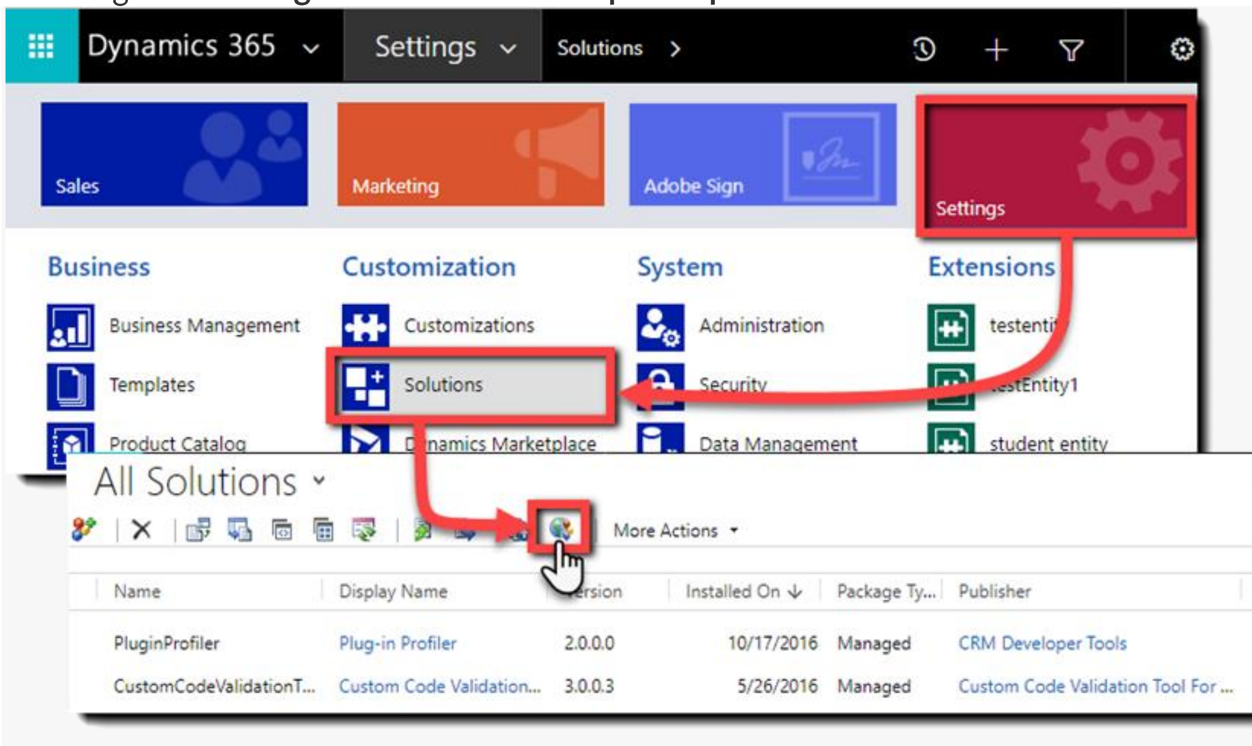
- Log in to Dynamics as a Dynamics Administrator
- Navigate to: **Settings** > **Security** > **Users**



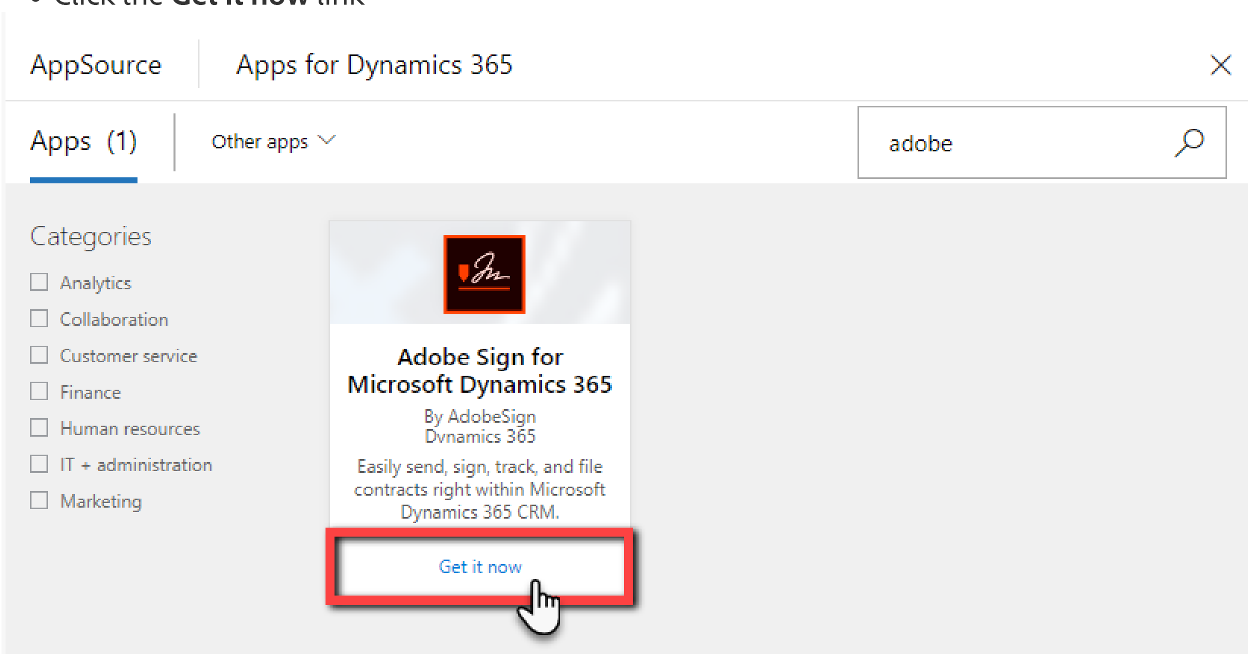
- Select the user to which you want to grant access to install the package and then click on **Promote to Admin**



- Navigate to: **Settings** > **Solutions** > **Marketplace Option**

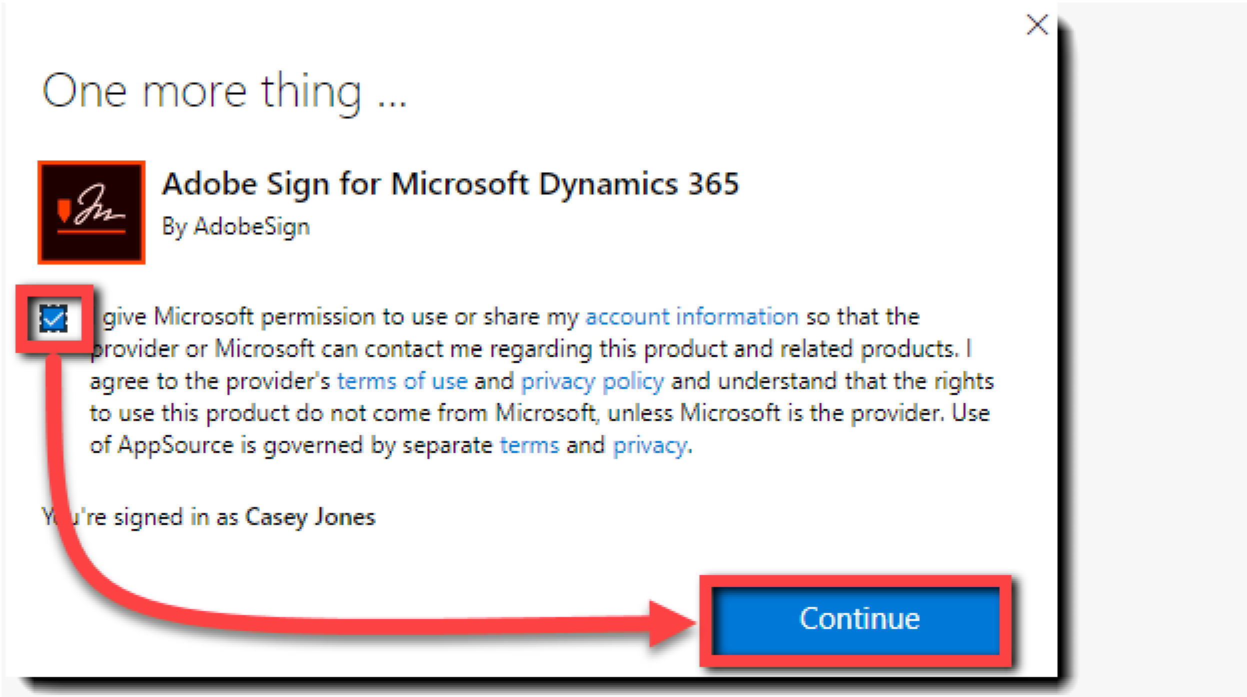


- Search for Adobe in the search box at the top right of the AppSource window
- Click the **Get it now** link



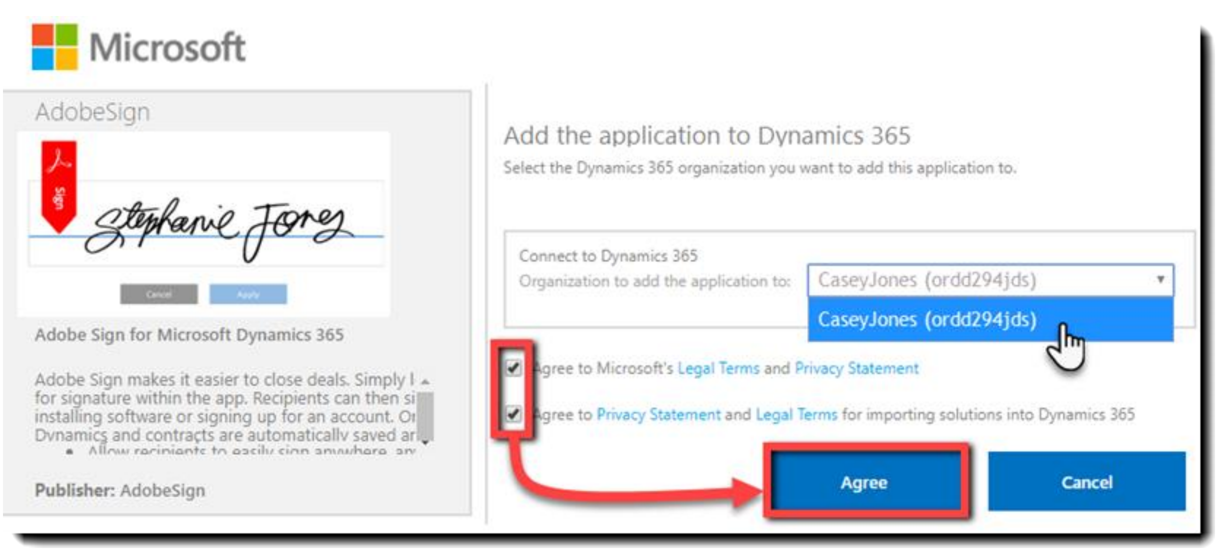
- Check the checkbox to give Microsoft permission to use or share account information and then click **Continue**

- You will be redirected to a new Terms and Privacy page



- On the Terms and Privacy page:
- Select the correct Dynamics organization to apply Adobe Sign to (if you have more than one org)
- Agree to Microsoft's Legal Terms and Privacy Statement
- Click the **Agree** button
- You are redirected to the status page, and installation starts automatically
- You need to refresh the page to update the status
- After the package is installed, it becomes visible in **Solutions** under *Settings*.

Note:
If a previous *Adobe Sign for Dynamics* package is already installed, then the package gets upgraded to the new version.



Post Install Configuration (Required)

Install the Integration Key

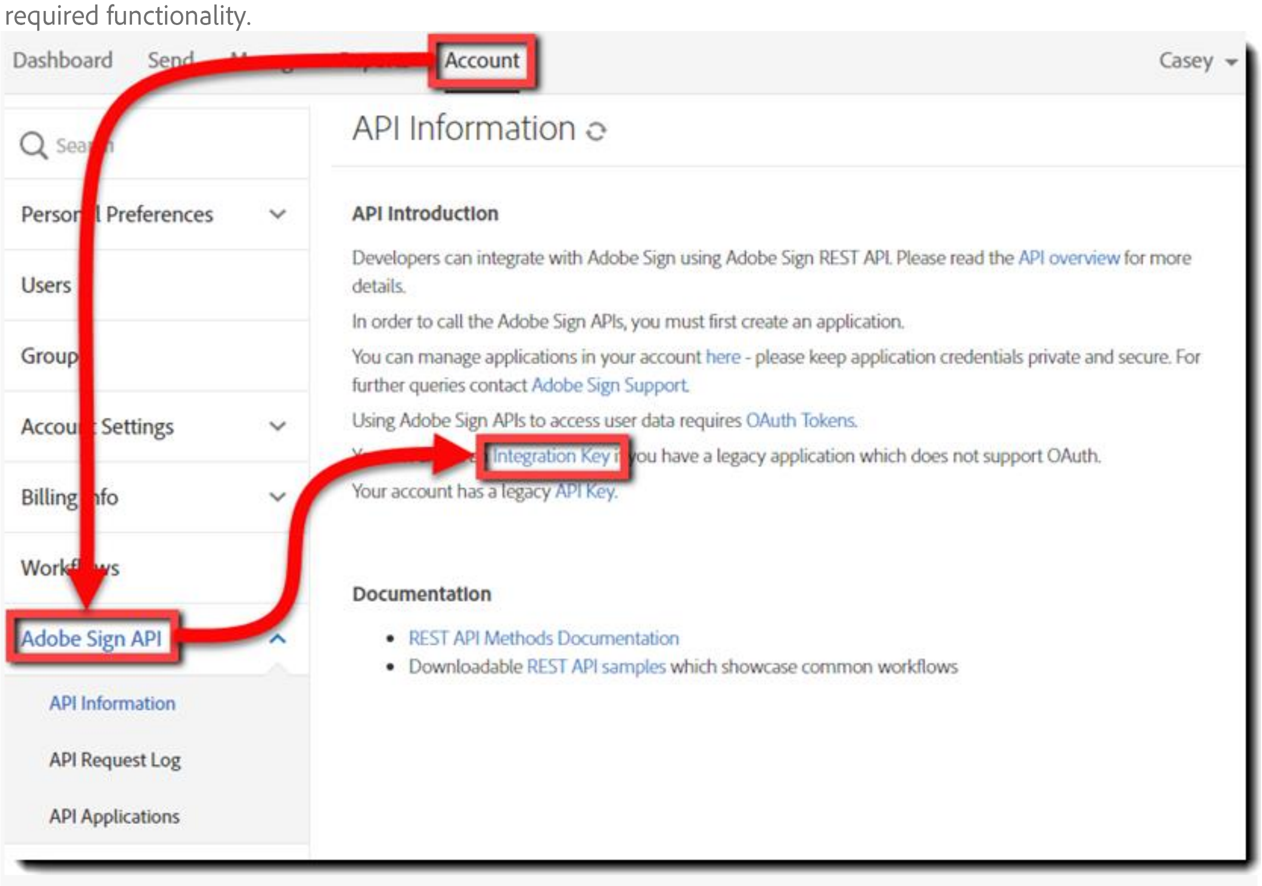
New installations require an integration key to be generated in Adobe Sign and then entered into Dynamics. This key is the access token that authenticates the Adobe Sign and Dynamics environments to trust each other and share content.

To generate an Integration Key in Adobe Sign:

- Log in to your administrative user for your Adobe Sign account
- Navigate to **Account** > **Adobe Sign API** > **API Information**
- Click the **Integration Key** link in the middle of the page

Note:

If you do not see the **Integration Key** link on your *API Information* page, please contact your success manager (or Adobe Sign support) to review your account settings and make the required adjustments to expose this required functionality.

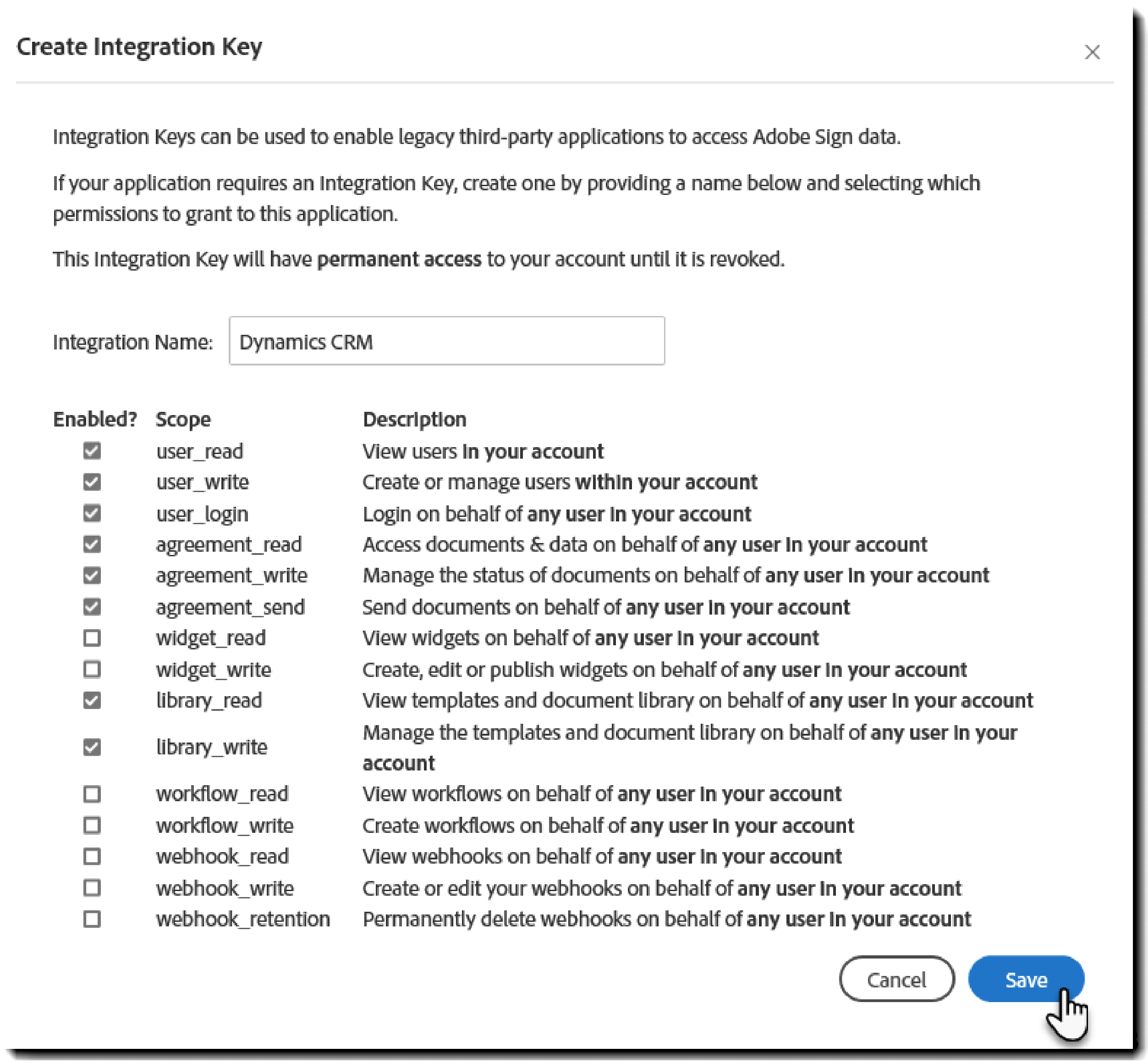


The *Create Integration Key* interface loads:

Provide an intuitive name for your key (e.g. Dynamics CRM)

The Integration Key must have the following elements enabled:

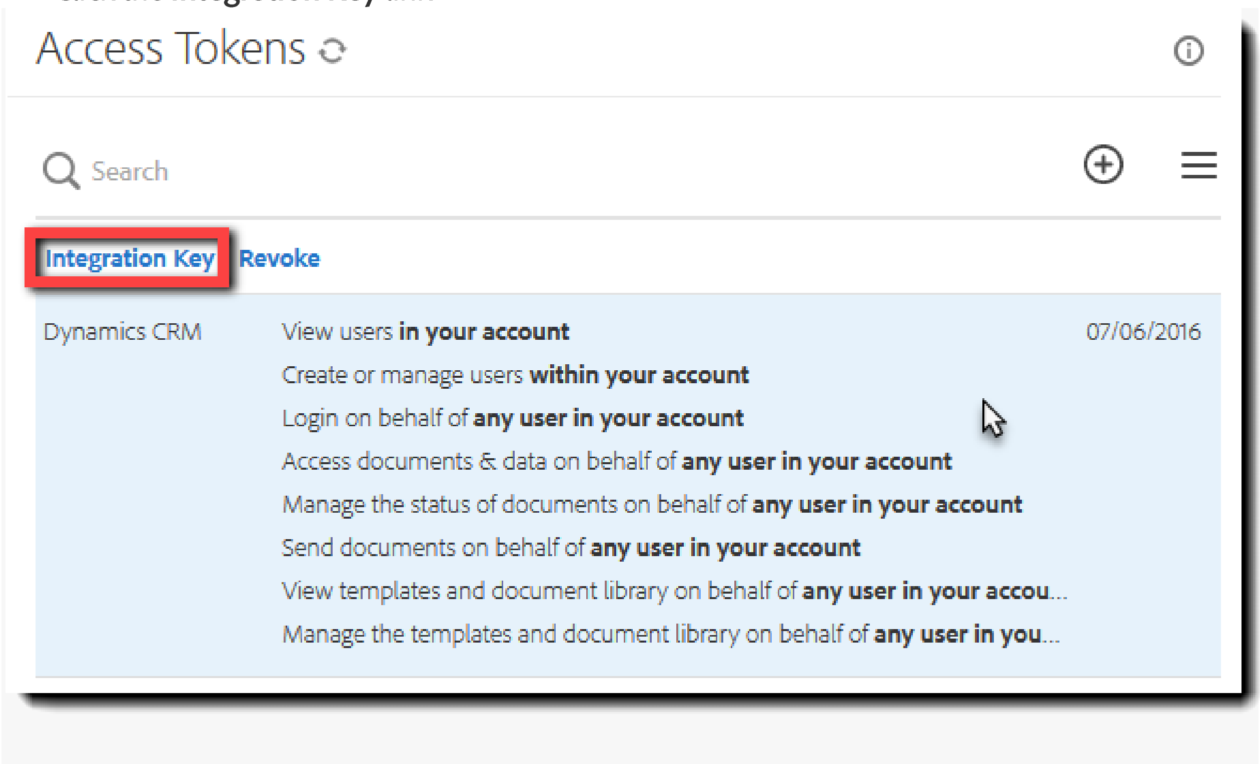
- user_read
- user_write
- user_login
- agreement_read
- agreement_write
- agreement_send
- library_read
- library_write



- Click **Save** once the key is configured.

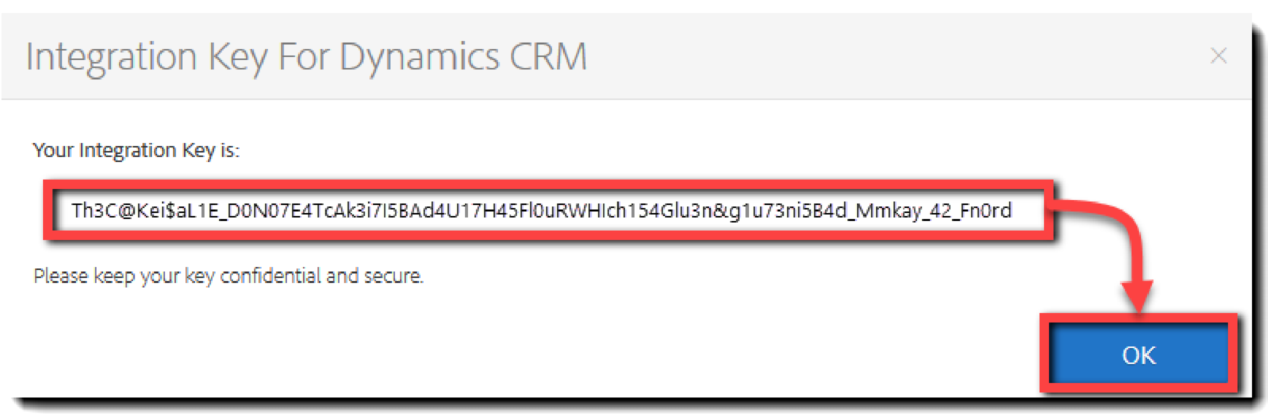
The Access Tokens page is exposed showing the keys designed in your account.

- Click the key definition created for Dynamics CRM
  - The Integration Key link is exposed at the top of the definition.
- Click the **Integration Key** link



The Integration key is exposed:

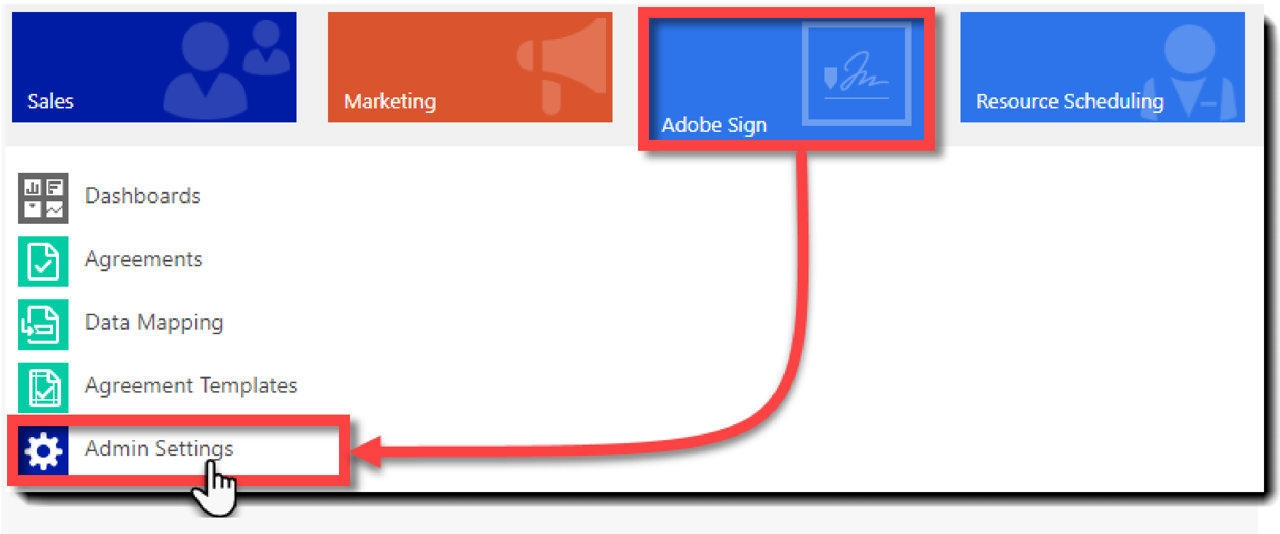
- Copy this key and save in a secure place for the next step
- Click **OK**



To install the integration key into Dynamics CRM:

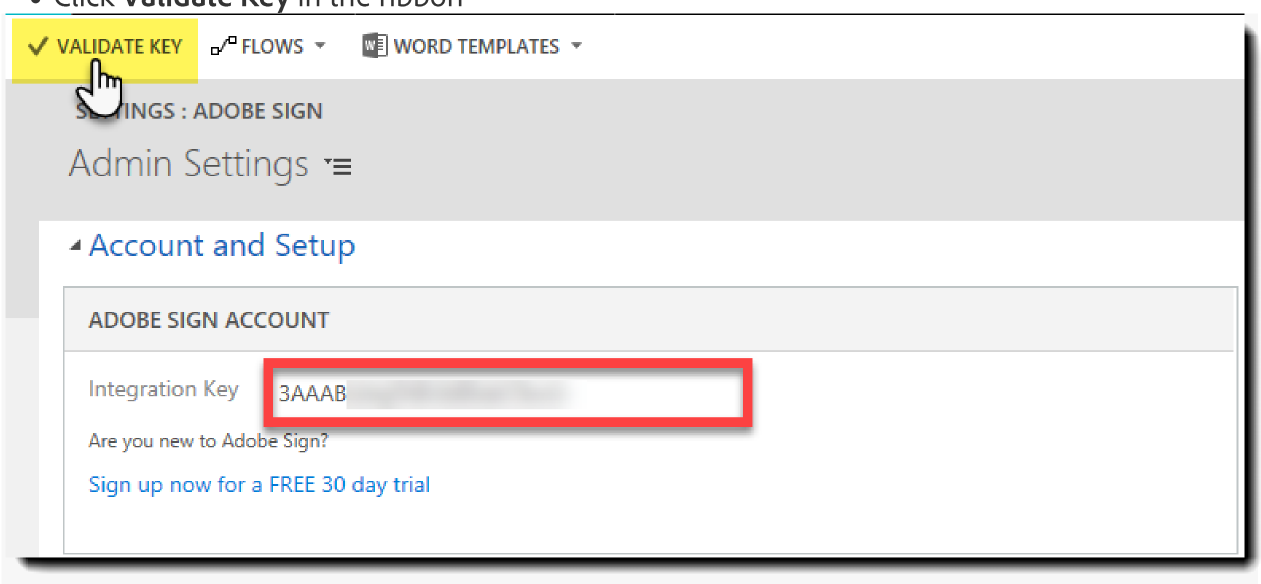
Log in to your administrative user for your Dynamics CRM environment

- Navigate **Main** > **Adobe Sign** > **Admin Settings**



The Adobe Sign *Admin Settings* page loads:

- Paste your key into the **Integration Key** field
- Click **Validate Key** in the ribbon



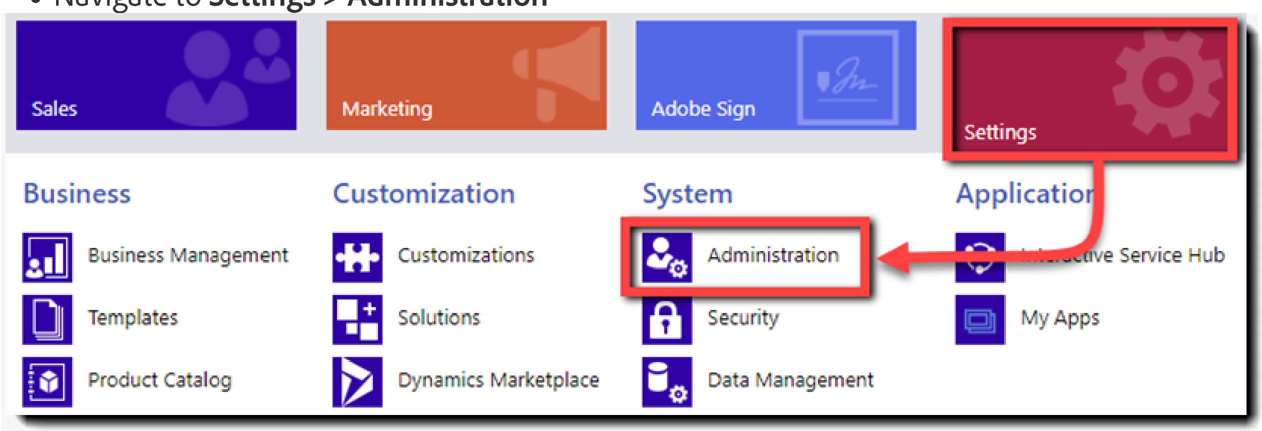
After a short delay, the page refreshes showing that "You are logged in with Adobe Sign" and displaying the integration key being used.

- The *Integration Key* field will be locked
- The *Validate Key* button changes to *Remove Key*

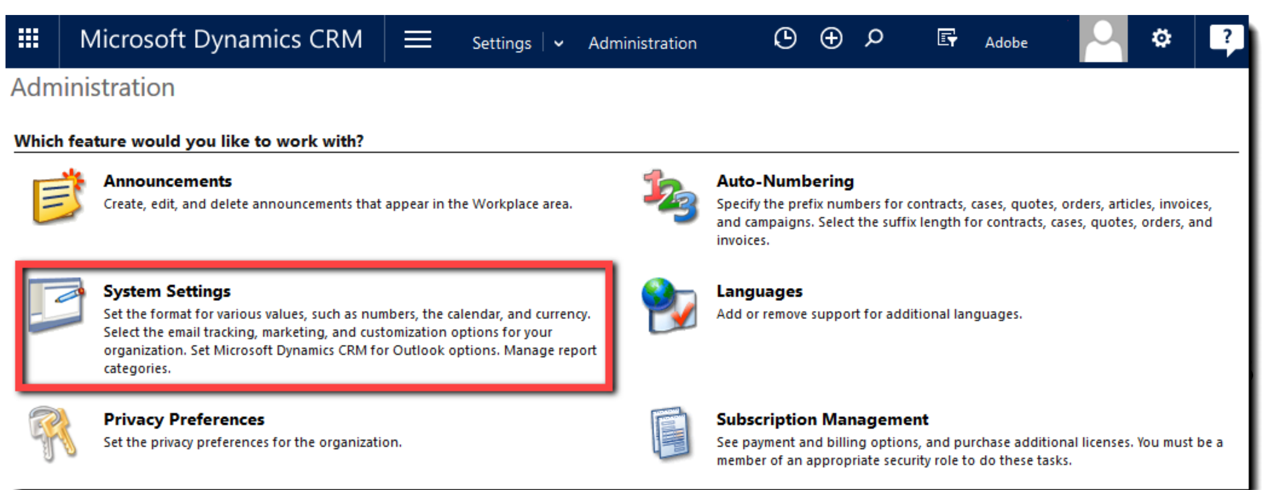
Verify Legacy Form Rendering is Disabled

It is necessary to disable legacy form rendering to use Adobe Sign. To do this:

- Navigate to **Settings** > **Administration**

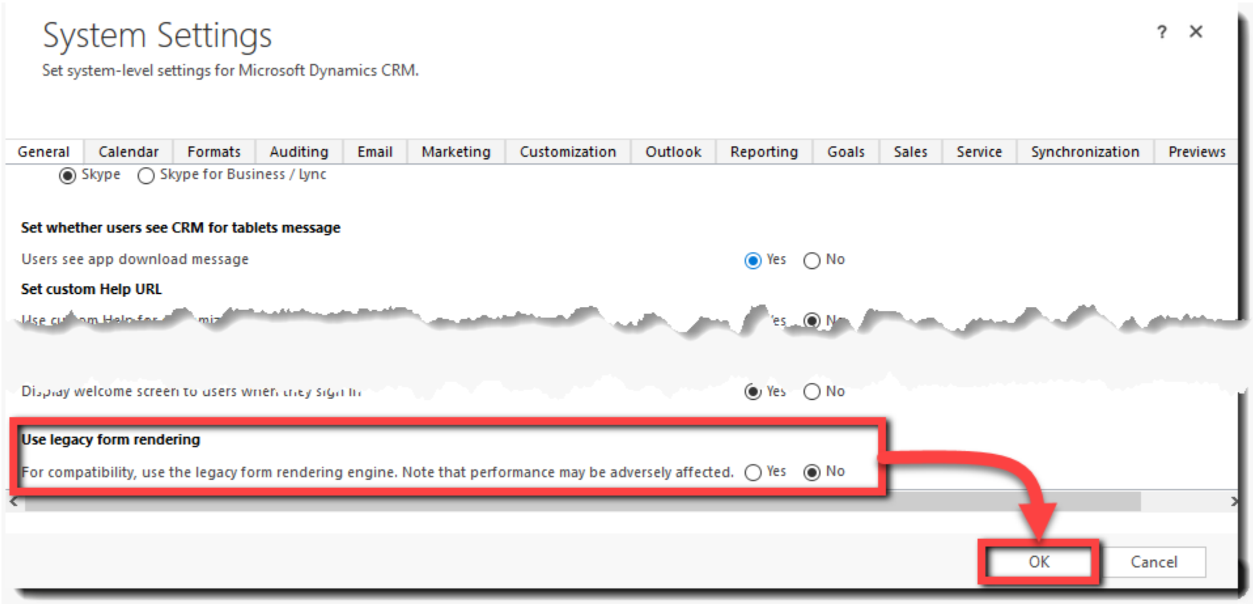


- Click **System Settings**



The *System Settings* page loads.

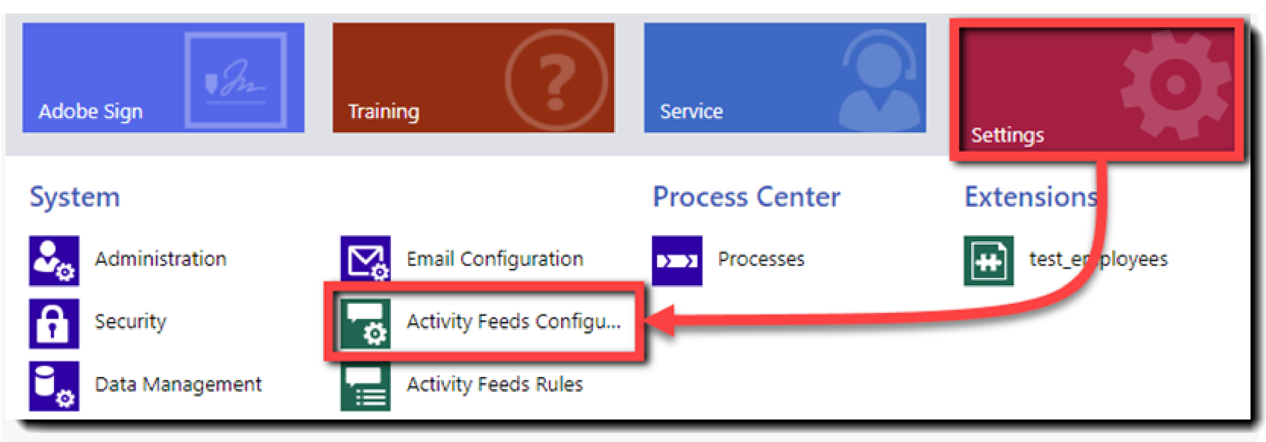
- Ensure that the *Use legacy form rendering* setting is set to No
- Click **OK**



Enabling Activity Feeds on Adobe Agreement entity

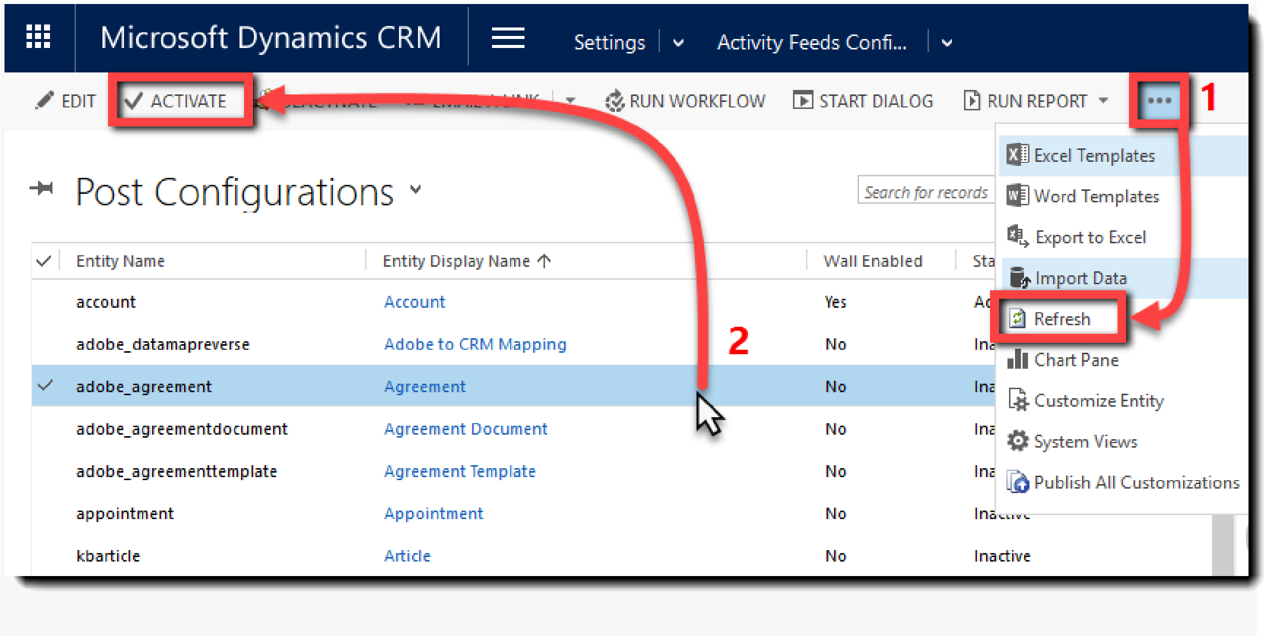
Enabling the activity feed for the adobe_agreement object permits Adobe Sign to update the events of the agreement under the Posts section on the Agreement record as well as the CRM records that were the parent object for the agreement (Contacts, Accounts, etc.).

- Navigate to **Settings** > **Activity Feeds Configuration**



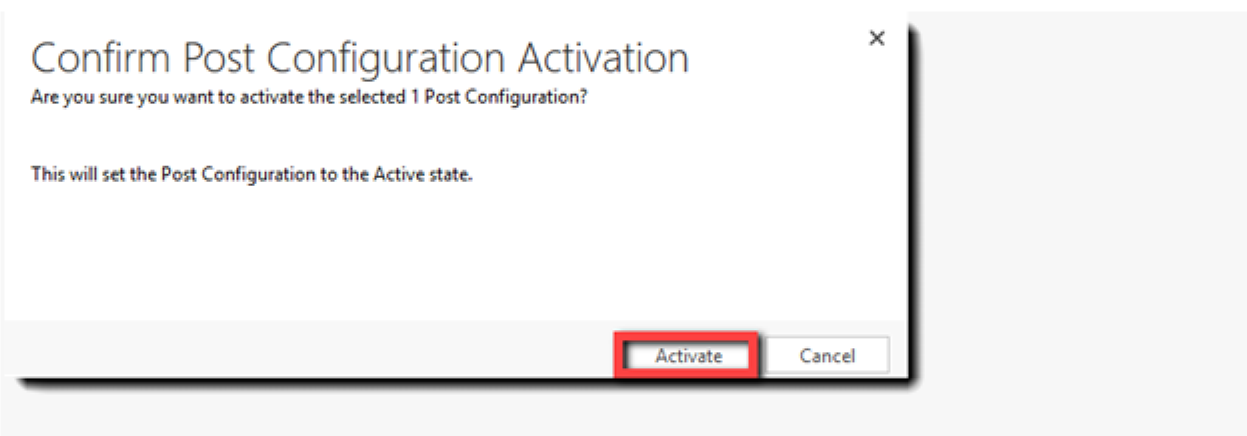
The Post Configurations page loads:

1. Click **Refresh** to ensure all configurations load
2. Single click the **adobe_agreement** record to select it, and then click **Activate**



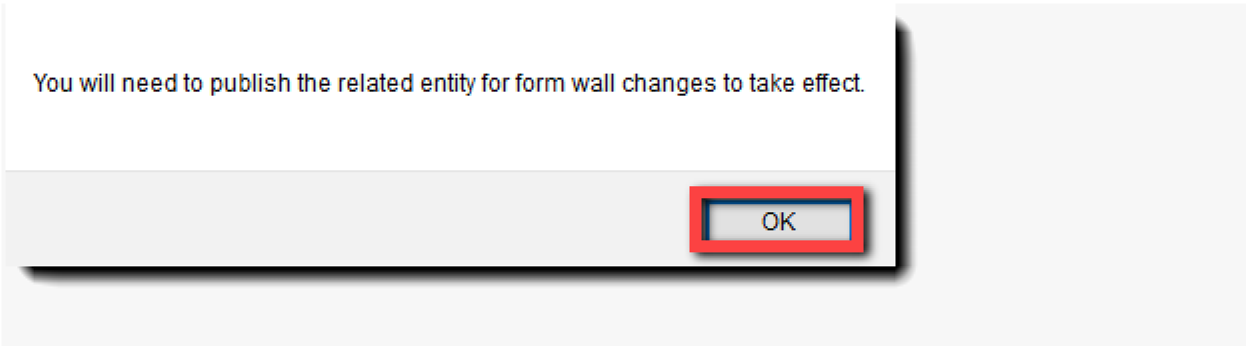
The *Confirm Post Configuration Activation* pop-up is presented

- Click **Activate**



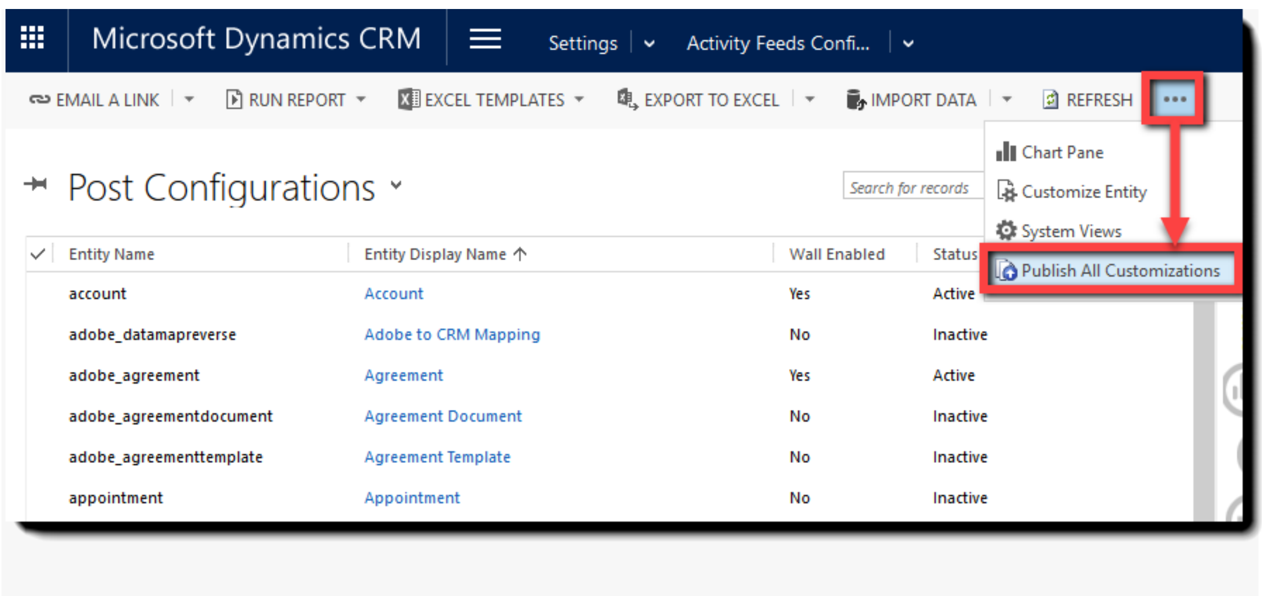
The *"You will need to publish…"* notification pops up

- Click **OK**



You are returned to the *Post Configurations* page

- Click the ellipsis (…) to open the hidden options
- Click **Publish All Customizations**



Deploy Adobe Sign to Users by Assigning Security Roles

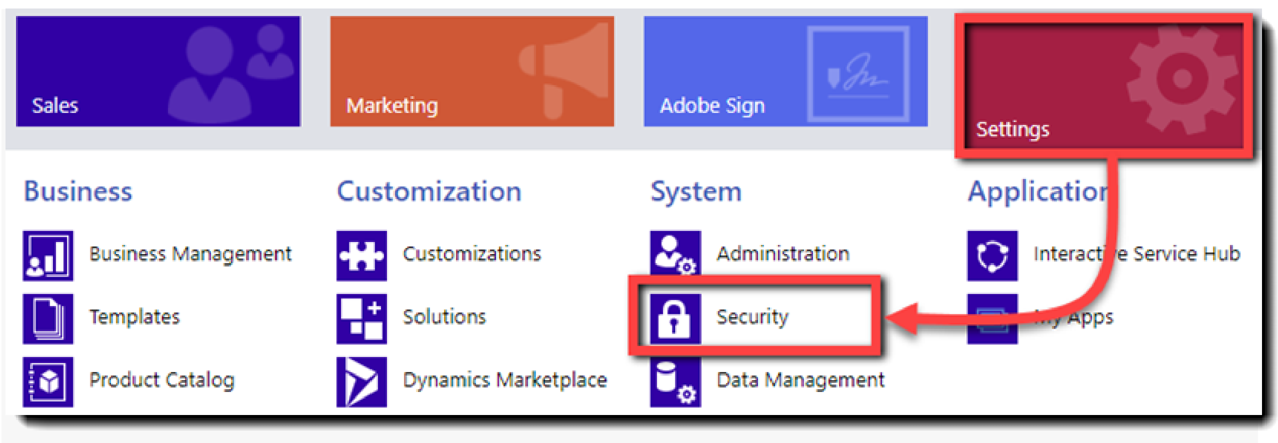
Every Dynamics user that is expected to use the Adobe Sign application needs to have their security role configured in the Dynamics environment.

The security roles are:

- **Adobe Sign Reader** –Allows the user **read-only** access to Agreement records.
- **Adobe Sign User** - Allows the user to work with Agreements and other application entities. This role permits the user to see **only their own records** and allows User level access to built-in CRM records such as Contacts, Accounts, Leads, Opportunities, Orders, Invoices, Quotes.
- **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**.

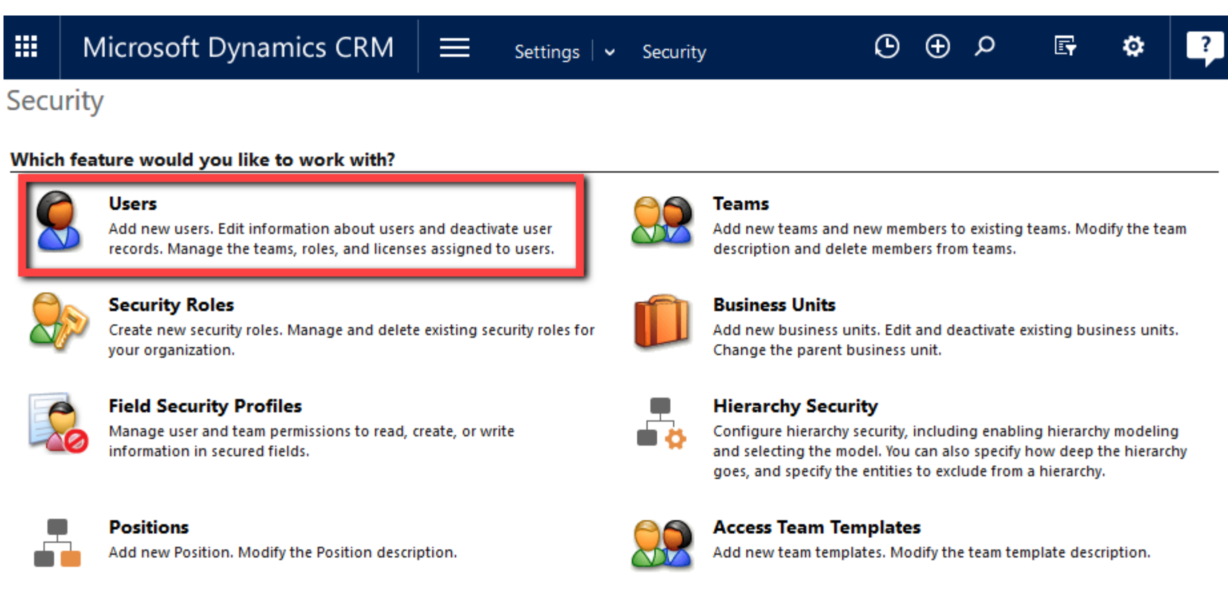
To configure the security roles:

- Navigate to **Settings** > **Security**



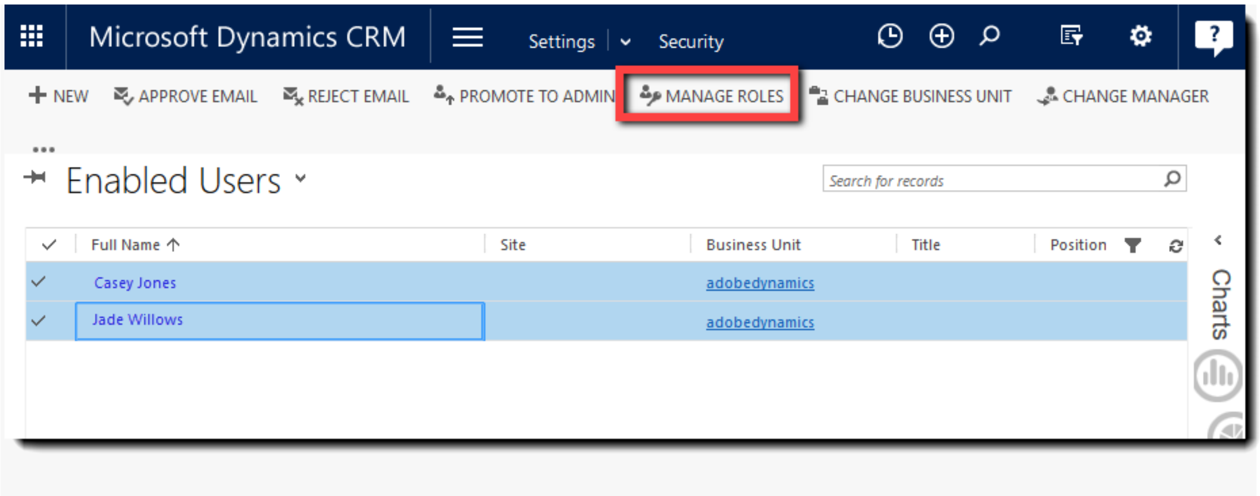
This opens the *Security* page

- Select **Users**



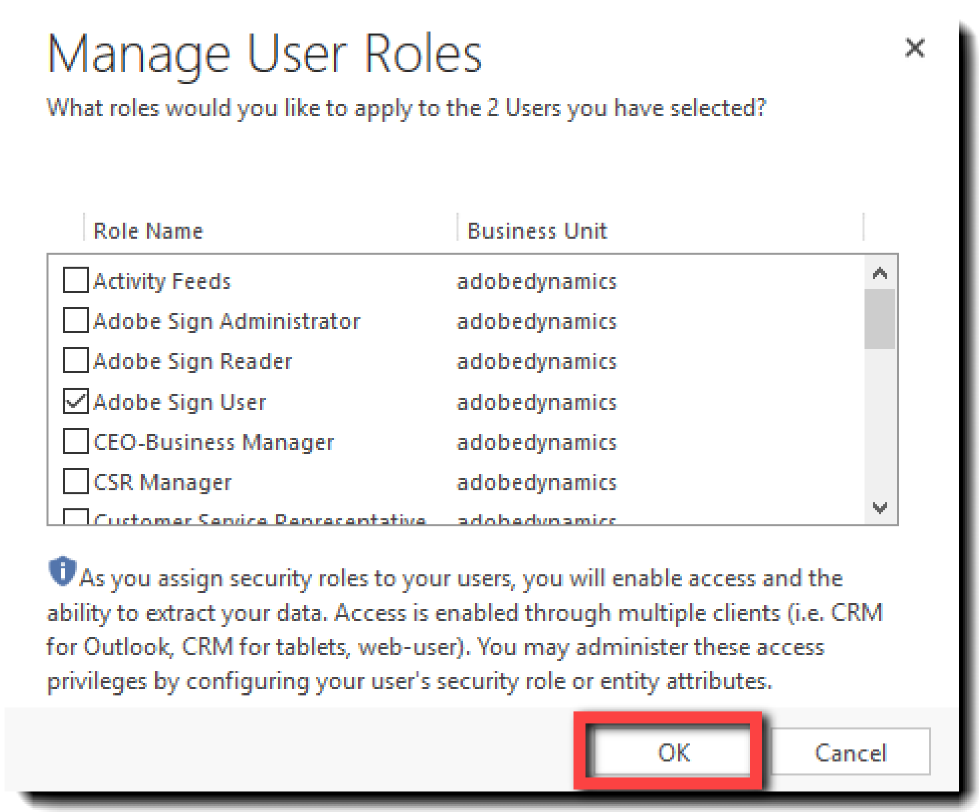
The *Enabled Users* page loads

- Select all the users you want to promote to one type of security role
- Click **Manage Roles**



The *Manage User Roles* pop-up displays

- Check the security role you want to define for these users
- Click **OK**



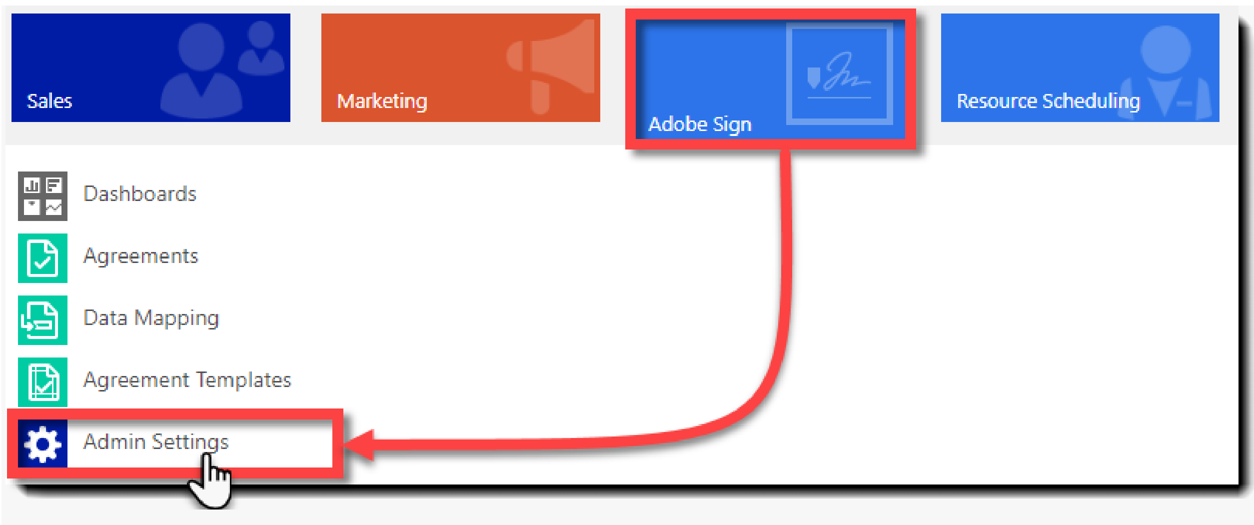
Optional Configurations

Adobe Sign Admin Settings

The Adobe Sign Admin Settings page permits access to the administrative tools for building templates and mapping data, as well as creating custom workflows. Optional settings are also available to customize the user experience.

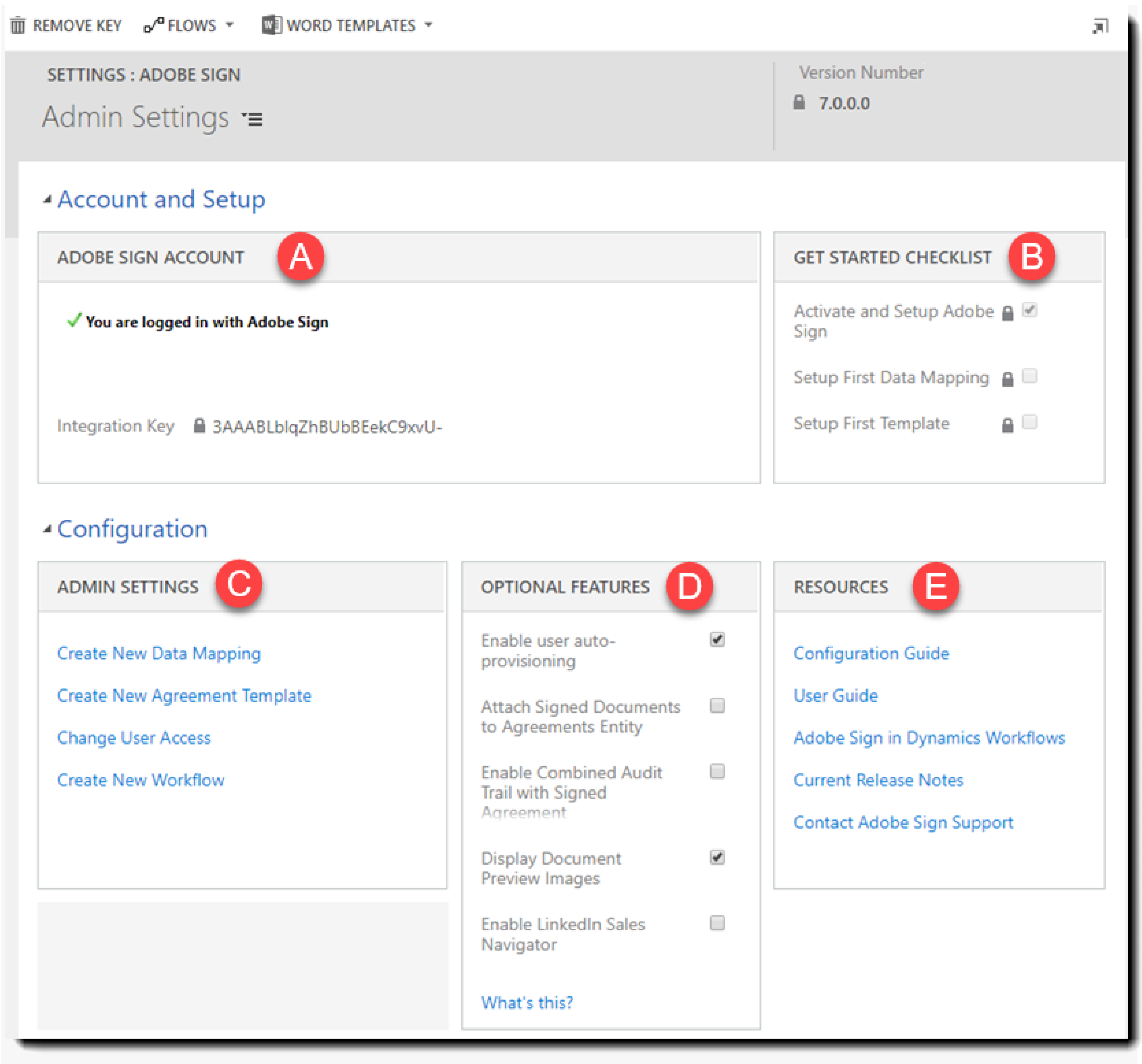
To access the settings:

- Navigate to **Adobe Sign** > **Admin Settings**



The Adobe Sign *Admin Settings* page loads, identifying five discrete sections of functional tools:

A. **Adobe Sign Account** – The Integration key that links the Dynamics environment to the Adobe Sign servers
B. **Get Started Checklist** – A running checklist of the installation milestones
C. **Admin Settings** – The tools that Admins will need to interact with frequently
D. **Optional Features** – Automated features that typically are set once, and left in place
E. **Resources** – Online access to commonly needed documents and access to the Support ticketing system



Adobe Sign Account

This section is purely dedicated to the Integration Key link between the Dynamics environment and the Adobe Sign servers.

The key can be removed at any time to disconnect the Adobe Sign services.

Get Started Checklist

This section shows the installation progress as measured by the key configuration points:

- **Activate and Setup Adobe Sign** – Checks when the Integration key is successfully installed
- **Set up First Data Mapping** – Checks when the first Data Mapping is saved
- **Set up first Template** – Checks when the first Template is saved

Admin Settings

Commonly used tools for Admins to extend the value of the Adobe Sign service:

- **Create New Data Mapping** – Opens the *New Data Mapping* interface
- **Create New Agreement Template** – Opens the *New Agreement Template* interface
- **Change User Access** – A short-cut link to the *Enabled Users* page where the roles for users are managed
- **Create New Workflow** – Opens the *Create Process* interface

Optional Features

- **Enable user auto-provisioning** – If enabled, new users that are given access to the Adobe Sign entity automatically provision a user in the Adobe Sign system upon first use. Provisioning is based on the users' primary email address, not the User Name, and takes place in the background without further action by the user or account administrator.

Note:

New users that are automatically provisioned in Adobe Sign have a randomized password. Because the integration is working as an authenticated application via API, there is no functional problem within the Dynamics environment. However, if the user seeks to log in to Adobe Sign directly, they need to first reset their password via the "I forgot my password" link on the Adobe Sign home page.

- **Attach Signed Documents To Agreements Entity**– This option pushes a PDF copy of the completed document back into Dynamics, attached to the agreement record (under the Notes section). This would be a copy of the authoritative original which is maintained on the Adobe Sign servers.
- **Enable Combined Audit Trail with Signed Agreement** – Enabling this causes the Adobe Sign audit trail PDF to be attached to the agreement record (under the Notes section) once the agreement is signed/completed. The audit trail explicitly enumerates the events (viewed, signed, delegated, etc.) of the agreement, the timeline of those events, as well as the IP address where the events were enacted.
- **Display Document Preview Images** – This option attaches an image of the signed/completed document to the record for easy viewing without having to download and open a PDF file. This image is installed at the very bottom of the agreement record.
- **Enable LinkedIn Sales Navigator** – When enabled, the *New Agreement* page displays the LinkedIn Sales Navigator panel. This interface allows for the user to configure their individual LinkedIn account, and display the LinkedIn information for any selected recipient added to the agreement.

LinkedIn Sales Navigator Team or Enterprise edition is required to enable function.

Note:

The LinkedIn Sales Navigator is a separate service from Adobe Sign and is not included in the purchase of the Adobe Sign service.

The LinkedIn Sales Navigator is a premium paid service, and a free demo is available if you would like to check it out.

Resources

A list of the most common resources:

- **Configuration Guide** – This document
- **User Guide** – The guide for users to understand the basic workflow of sending and managing their agreements.
- **Adobe Sign in Dynamics Workflows** – The guide to the Adobe Sign Workflow assets
- **Current Release Notes** – The release notes for the most current version of the Adobe Sign for MS Dynamics
- **Contact Adobe Sign Support** – A link to the Adobe Sign ticketing system. You will need to authenticate to the Adobe Sign server to expose the support form.

Removing / Revoking the Integration Key

If you need to remove the current Integration Key from your Dynamics installation, you can do so on the Adobe Sign Configuration page under Global Settings. Removing the key severs the trust relationship between Dynamics CRM and Adobe Sign, stopping all new transactions as well as updates for existing transactions. Once the key is removed, it can be re-applied at any time to resume the interaction between the two systems.

To remove the key:

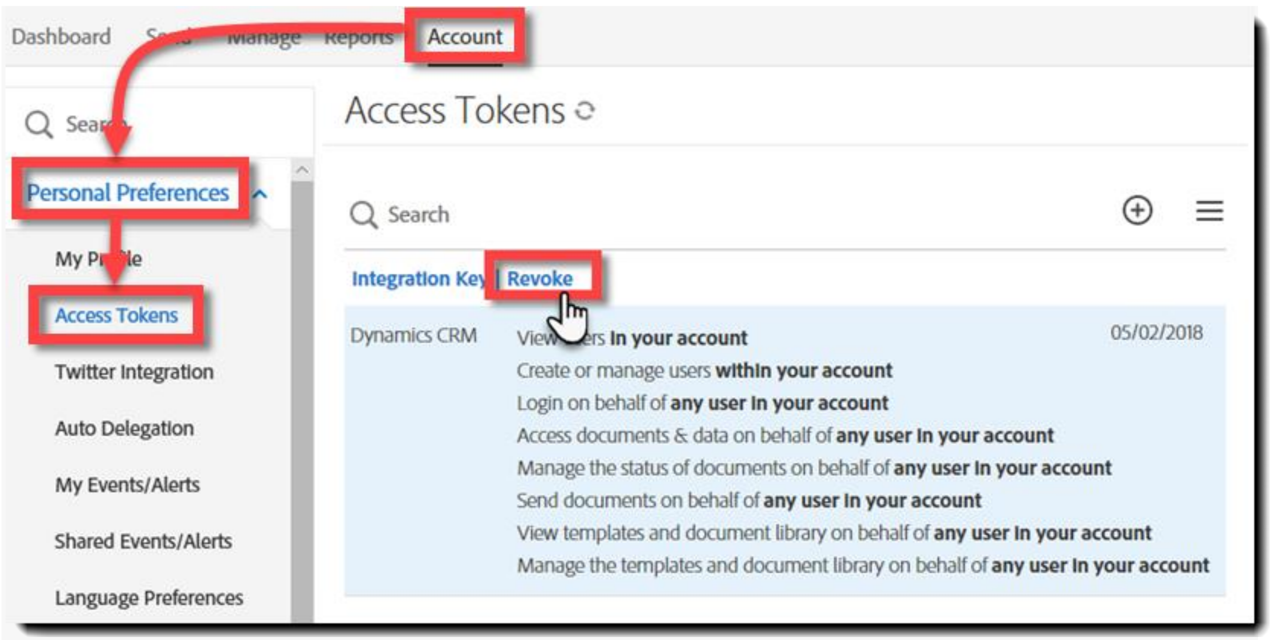
- Navigate **Adobe Sign** > **Admin Settings**
- Click **Remove Key** in the ribbon

Removing the key is not the same as revoking the key. Revoking a key must be done in the Adobe Sign system, and makes that key permanently disabled for Adobe Sign use.

To revoke a key:

Log in to your administrative user for your Adobe Sign account

- Navigate to **Account** > **Personal Preferences** > **Access Tokens**
- Click the key definition for the Integration Key you want to revoke
  - This exposes the *Revoke* link
- Click **Revoke**



- Click **Yes** when challenged

Data Mapping

Defining Data Maps to populate forms, and update Dynamics

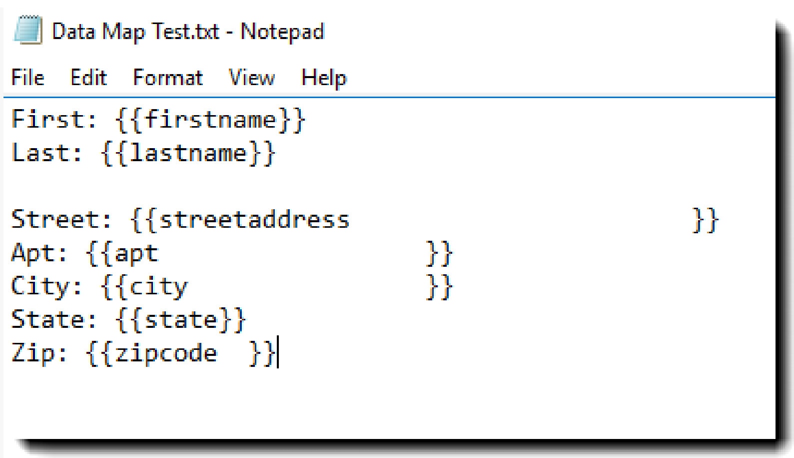
Data Mapping can significantly improve your agreement generation process and ensure that documents have the appropriate content in fields without the possibility of human error by pulling field values directly from Dynamics CRM.

Additionally, the mapping can push new content from completed agreements back into Dynamics, allowing valuable updates to your CRM without having to engage in manual data manipulation.

A Quick Note on Forms/Text Tags

Successful mapping requires that you have pre-built forms with defined field names so you can logically relate the CRM field to the Adobe Sign form field.

A simple form is illustrated below. The fields are defined by the curly bracket pairs on either side (defining the width of the field) and the field name (the string of characters between the curly brackets).



Text tags can include additional arguments beyond the name value, including validations, calculations, and regular expressions. An in-depth understanding of form building can be found here, and can dramatically improve the quality of data you capture during the signature process.

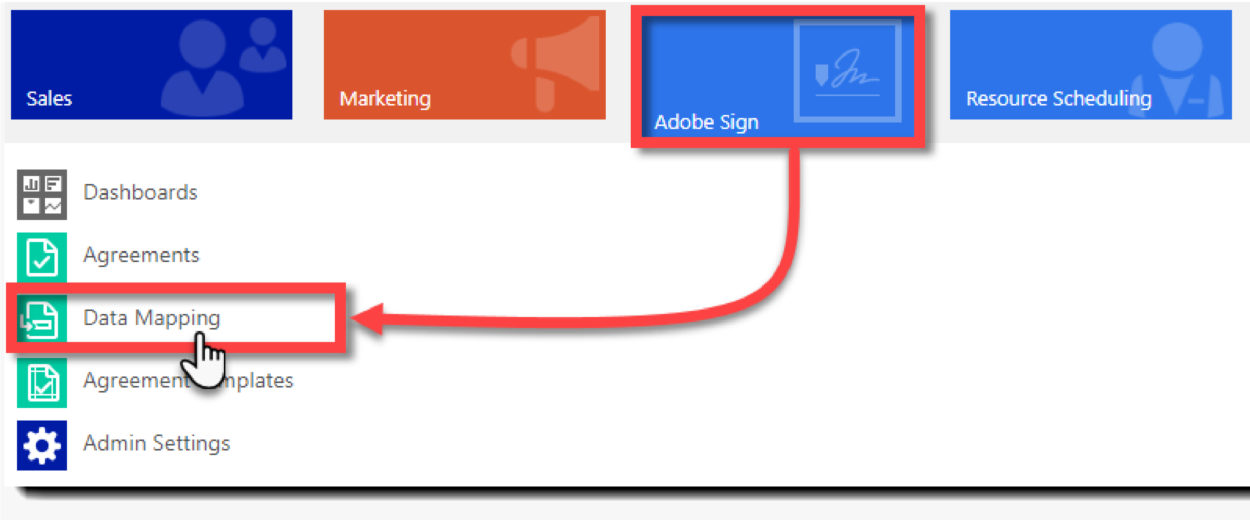
Note: The Text Tag Shortening feature can be very useful in form design and field mapping by establishing a convention for the field names that repeat on every document (and saves time by not having to re-create the formal tag). This expressly improves data mapping across multiple forms and builds an anchor for future forms.

It is also possible to build forms in PDF format.

Defining a Data Mapping Template

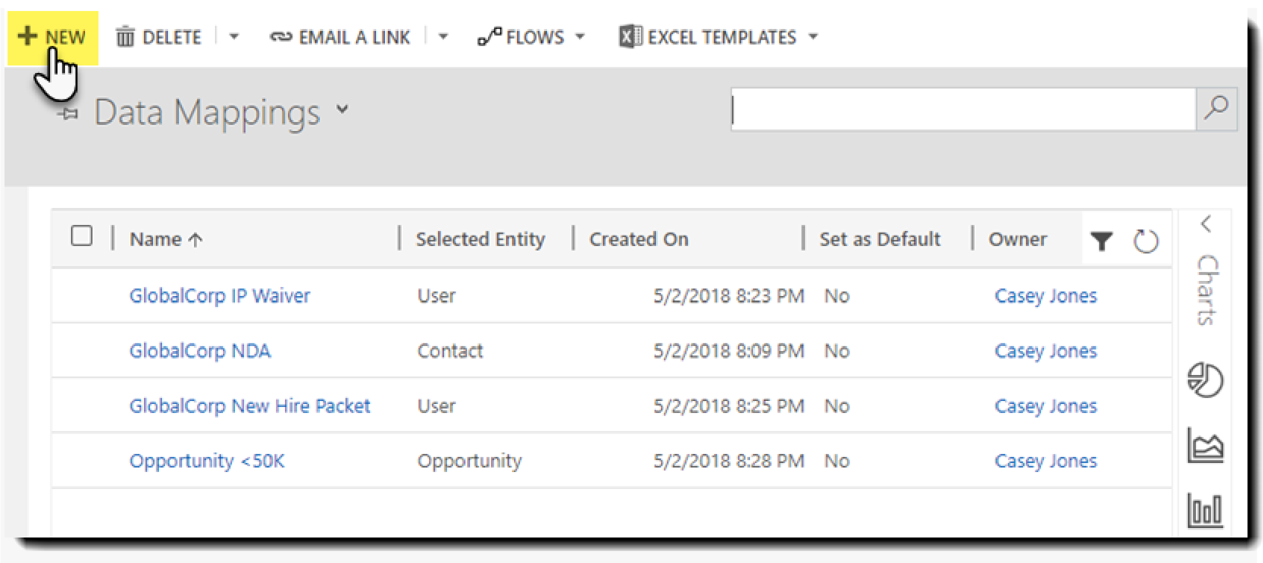
There are two access points to configure Data Mapping.

The first option is to navigate to: **Adobe Sign > Data Mapping**



This loads the *Data Mappings* page, a list of all existing data maps that you can review, edit, or delete.

- Click **+New** in the upper-left corner to access the *New Data Mapping* page



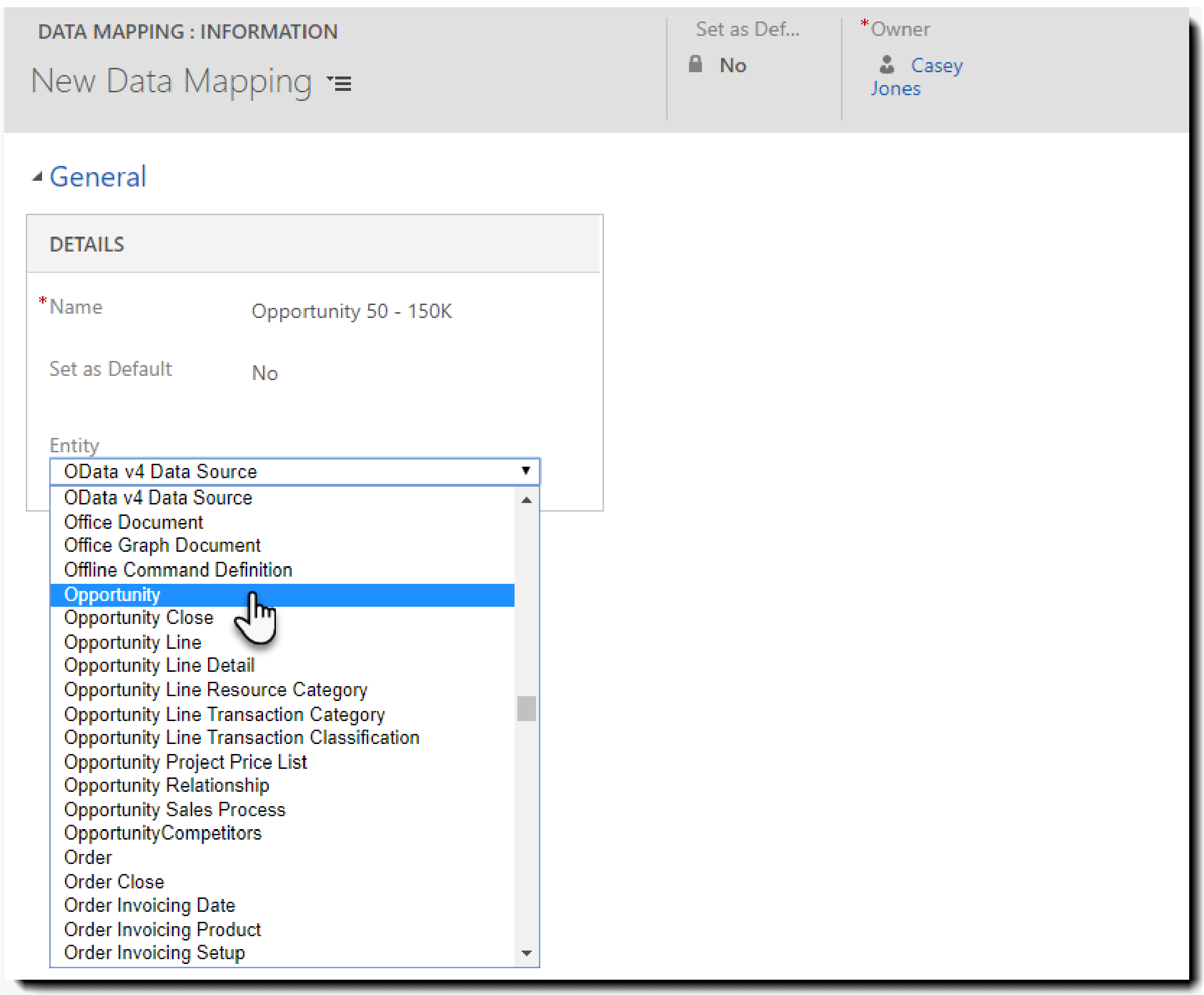
The second method is to access the **Create New Data Mapping** link on the *Admin Settings* page. This link bypasses the listing of all data maps and opens directly to the *New Data Mapping* page.

Loading the *New Data Mapping* page may take a moment; when the *Entity* field expands, the page load is completed.

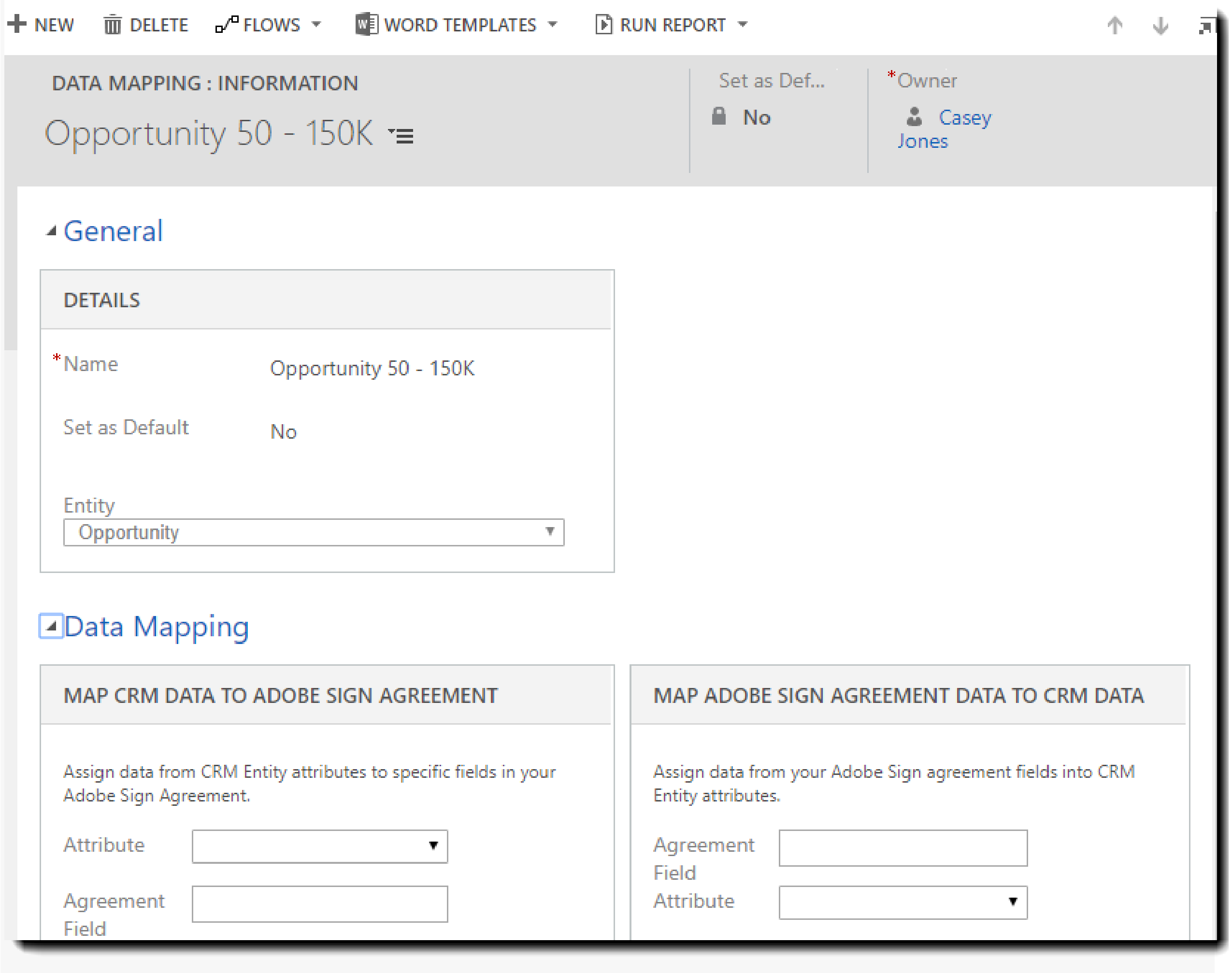
1. Enter an intuitive name for your data map

2. Identify this data mapping as the default mapping to be used for this entity (or not).

3. Select the CRM *Entity* from the drop-down.
   - This constrains the fields available for mapping to just the defined entity
   - It is possible to have multiple data maps per Entity
   - Once the entity value is set, it cannot be changed



Once the *Entity* value is set, the data mapping tools are exposed:



Relate the Dynamics CRM fields to the Adobe Sign field names

You can now start creating relationships between Dynamics CRM field names and the Adobe Sign form field names you have defined. Data mappings are configured based on how the data flows:

- **MAP CRM DATA TO ADOBE SIGN AGREEMENT** - Prefills fields on your form using field values associated with the defined Dynamics Entity.
- It is possible to create a "hunt group" of alternate CRM field values seeking to fill the Adobe Sign form field. Each member of the group will be tried in order until a non-null value is found and inserted. (See Below)

- **MAP ADOBE SIGN AGREEMENT DATA TO CRM DATA** -Populates the empty fields of the Dynamics Entity using form field values obtained through the signing process (once the agreement is completed).
- By default, Adobe Sign will not push a new value into a CRM field that has content.
- It is possible to define the relationship on the data map to override the content protection and replace existing field values with new content from the signed form.

Regarding Data Types

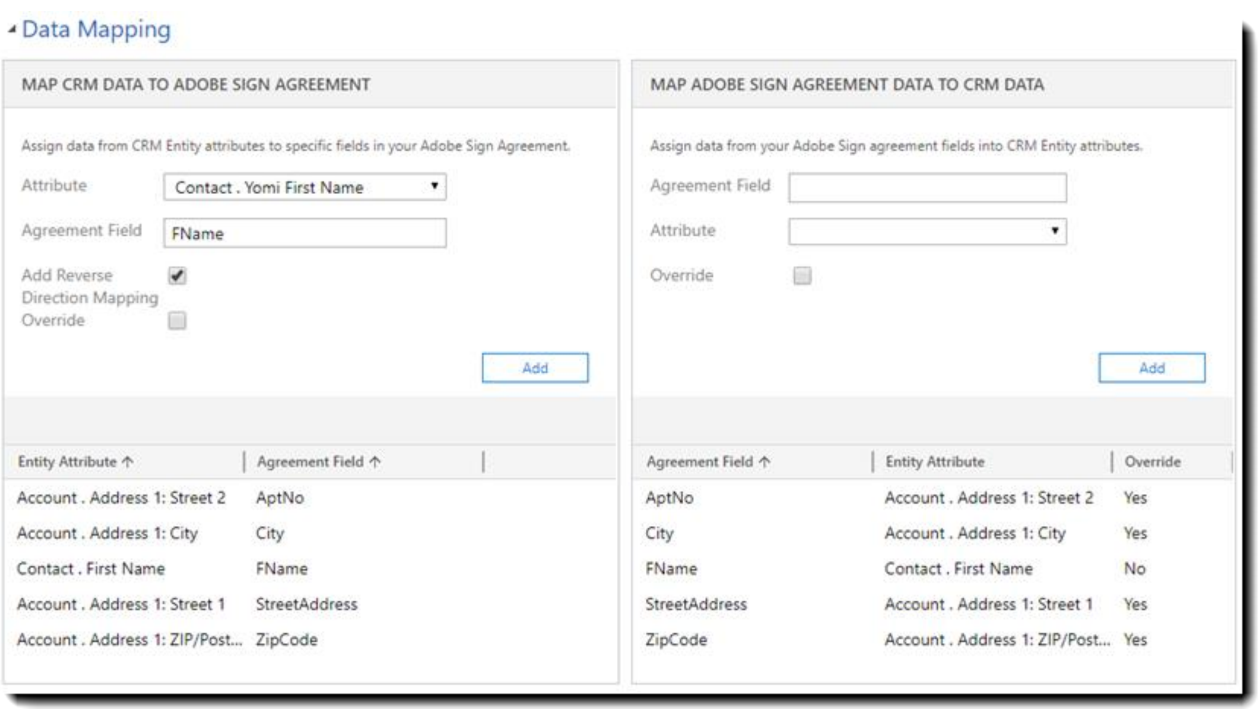
Adobe Sign data mapping supports the following data types:

- **Text** – Text form fields are supported as Single Line of Text in CRM.
- **Boolean (Two Option)**– Checkboxes are supported for CRM Boolean fields.
    - If drop-down or radio button form fields are used for Boolean CRM fields, the CRM to Adobe Sign mapping may fail. Adobe Sign to CRM mapping will still work
- **Option Set** – Dropdown lists and radio button form fields are supported for CRM Option Set fields

Relating fields (CRM Data to Adobe Sign Agreement):

- Select the CRM field from the *Attribute* drop-down
- Type the Adobe Sign form field name into the *Agreement field* input box
- (Optional) Check the *Add Reverse Direction Mapping* box if you want to also relate these fields mapping from Adobe Sign to CRM
- (Optional) Check the *Override* box if you want this template to ignore existing content in the CRM field and force-populate the field with the new content from the Adobe Sign field.
- Click **Add**

The new field relation will process for a few seconds, and then you will see the relationship populate below the configuration settings.



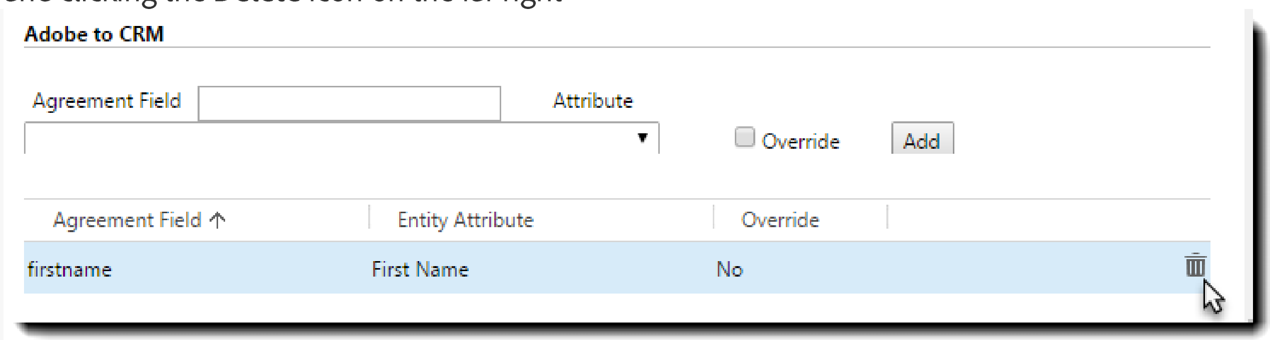
If you opted to add the reverse direction, you will see the new relationship populate under the *Adobe Sign to CRM* configuration fields also.
If you opted to *Override* the content protection, you will see that indicated on the relationship record.

Relating fields (Adobe Sign Agreement to CRM Data):

The process for discretely creating a mapping from Adobe to CRM is the same as above except there is no option to *Add Reverse Direction Mapping*.

Deleting mapped relationships

You can delete any mapped relationship by hovering your mouse over the relationship record and clicking the **Delete** icon on the far right



Alternate field mapping relationships (Hunt Group)

If you define a field on an Adobe Sign form that might be filled by one of several CRM fields, then you can create an ordered list (hunt group) of CRM attributes that will seek to populate the Adobe Sign field.

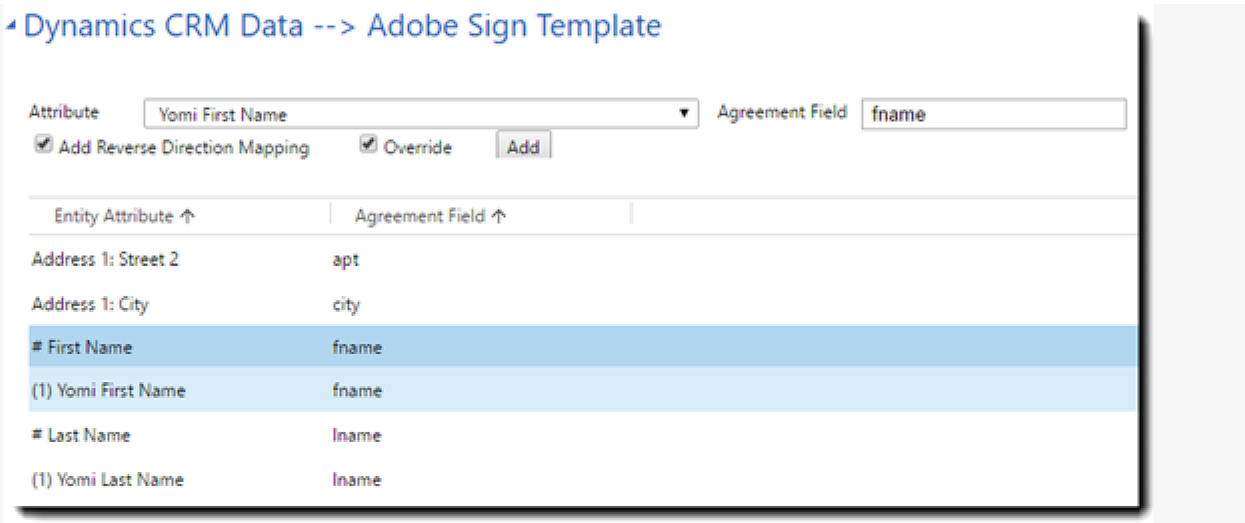
For example, you may have the CRM field *First Name* mapped to a form field named *FName*, and then also map the CRM field*Yomi First Name* to that same form field name. The application will first attempt to fill the field with content in the *First Name*field, and if no content is found, Adobe Sign will attempt to use content in the *Yomi First Name* field. If no content is found in any element of the hunt group, the field is left empty.

To define the hunt group:

- Create a CRM to Adobe Sign relationship between your primary CRM attribute and the Adobe Sign form field name.
- Once the first record is in place, change the CRM attribute to the secondary CRM attribute, and add that relationship.
- Click **OK** when asked if you want to make the alternate mapping

After the record is updated in the system, you will see that the records have changed to include a prefix in front of the Entity Attribute:

- # will be in front of the primary/default attribute.   This field will always be the first field checked for content
- Subsequent relations will be numbered 1-N. The first alternate field relationship is indicated by (1) and will always be the first alternate field checked. (2) would be the second alternate field, and so on.



Adding attachments to related Entities

Once an agreement is fully signed and executed, Adobe Sign will produce a PDF copy of the document and an audit trail of the signing process. It is possible to have these documents attached as PDF files to any other CRM Entity that is related to the template's parent Entity.

In the *MAP SIGNED AGREEMENT AND AUDIT TRAIL TO CRM ENTITY* section of the template page, you will find two *Document Types* available via drop-down:

- **Signed PDF** – The full text of the signed document. This is a copy of the authoritative original that is maintained on the Adobe Sign servers.
- **Audit Trail** – A full enumeration of all major events (signing, delegation, etc.) and the associated metadata (time/date, IP address, etc.)

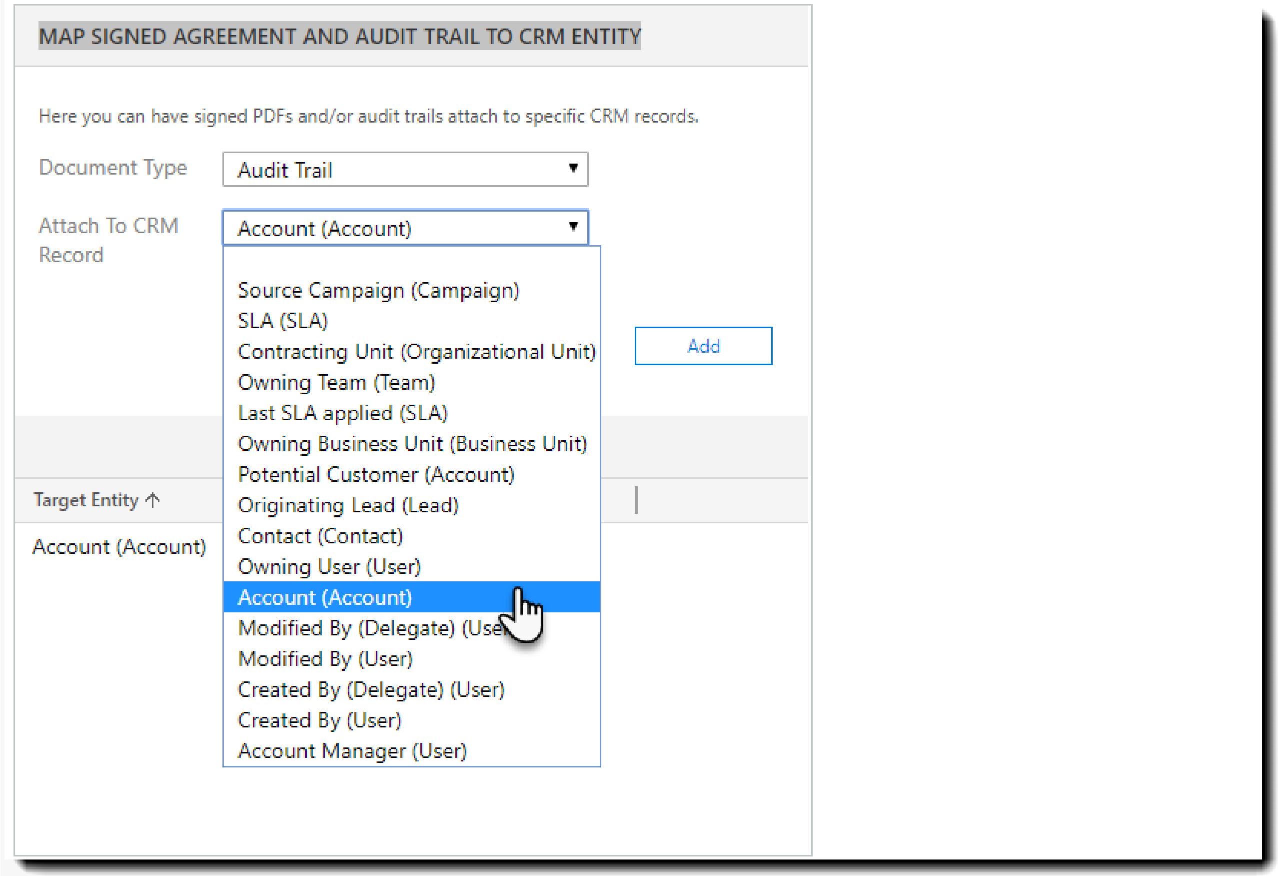
You can attach one or both files to any related Entity, but you must explicitly map them individually.

To map an attachment:

- Select the *Document Type* you want from the drop-down
- Select the Entity you want to push the document to, using the *Attach to CRM Record* drop-down list.
  - Only Entities with a defined relationship to the parent Entity will be listed

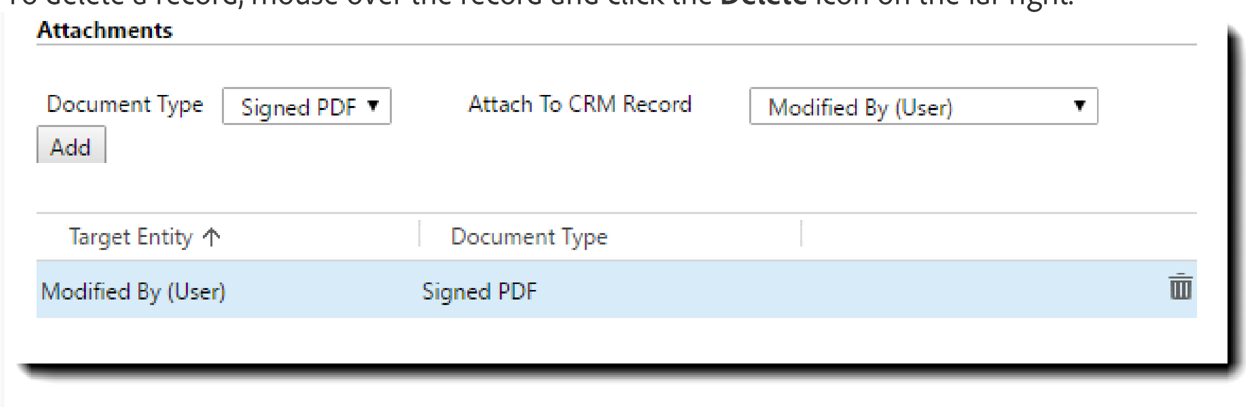
- Click **Add**

Attachment relationships will be listed under the configuration settings.



Deleting an Attachment

To delete a record, mouse over the record and click the **Delete** icon on the far right.

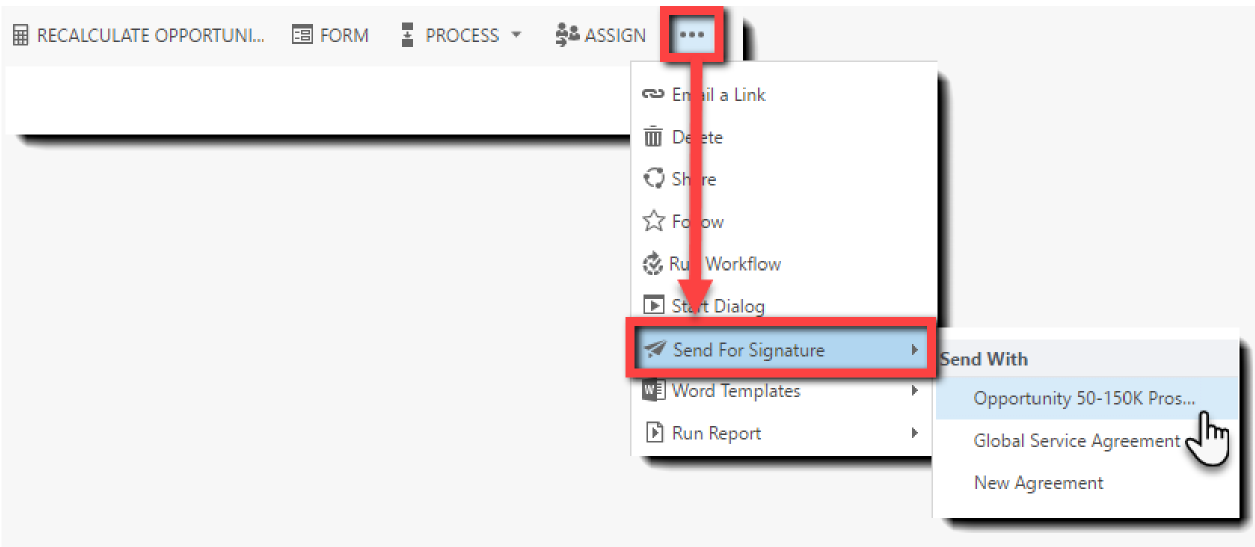


Agreement Templates

Creating custom templates for common actions

As an Adobe Sign Admin in the Dynamics environment, you have the authority to create agreement templates that can pre-configure a majority of the agreement fields, attach files, and tie that agreement to relevant data mapping.

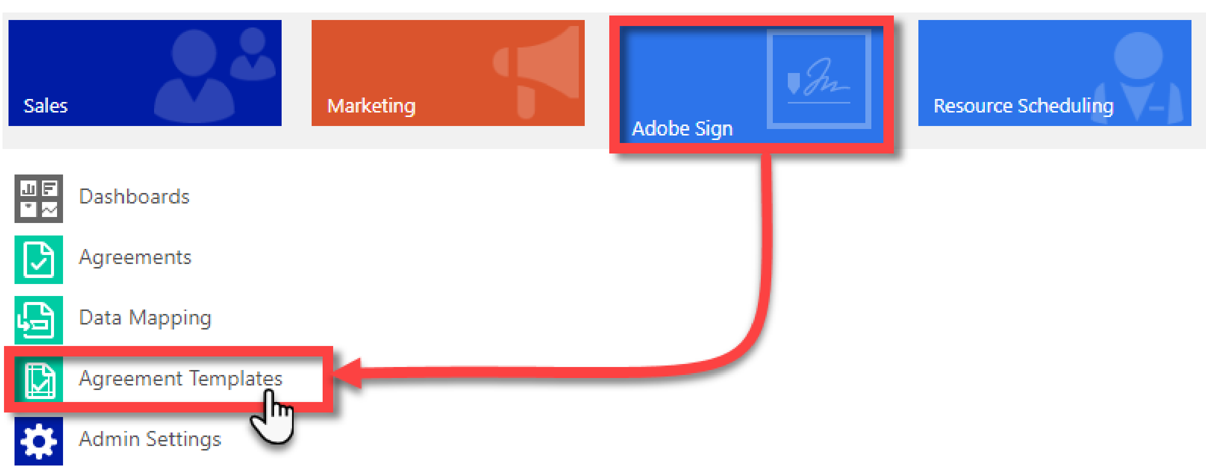
Templates are tied to a Dynamics entity, and become available for agreements sent from that entity when they are flagged as *Active*.



Note:

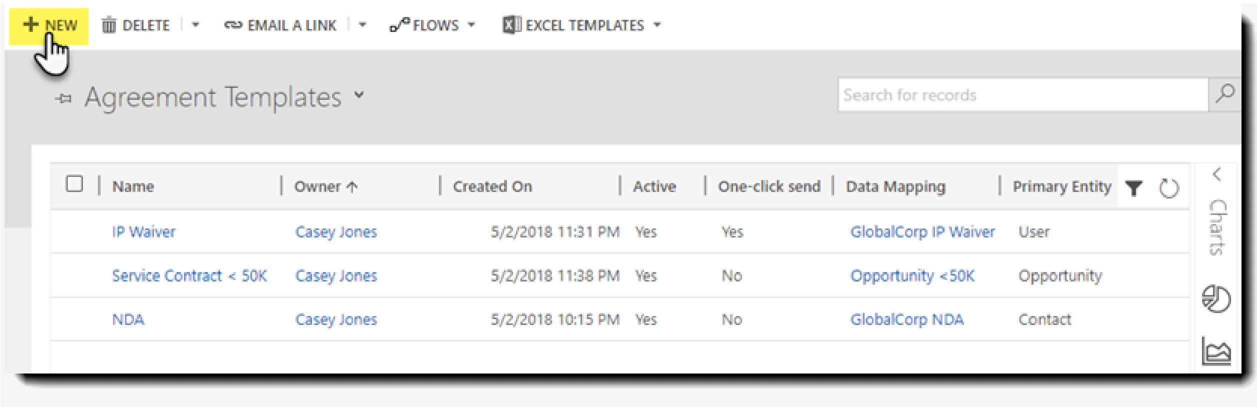
Data Maps are at the core of Agreement Templates and should be defined before the Agreement Template is configured.

Like *Data Mapping*, there are two access points to configure a new Agreement Template:
The first option is to navigate to: **Adobe Sign > Agreement Templates**



This loads the *Agreement Templates* page, which will list all the existing templates for you to review, edit, or delete.

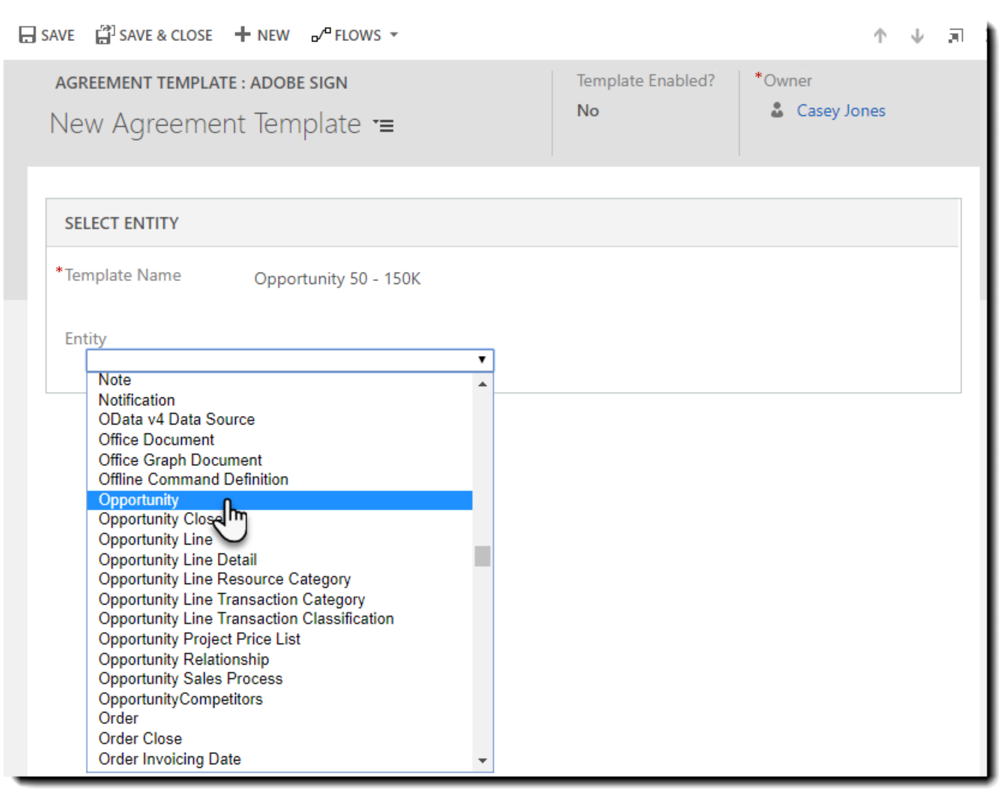
- Click **+New** in the upper-left corner of the screen to start a new template



The second method is to access the **Create New Agreement Template** link on the *Admin Settings* page
This link bypasses the listing of all agreement templates and opens directly to the *New Agreement Template* page.

When the *New Agreement Template* page opens:

- Provide an intuitive name for the template, so users will know when to use it
- Identify the Entity that the template should be tied to.
- The Entity cannot be changed later
- Once the Entity is selected, the template will be saved, and the full agreement template loads

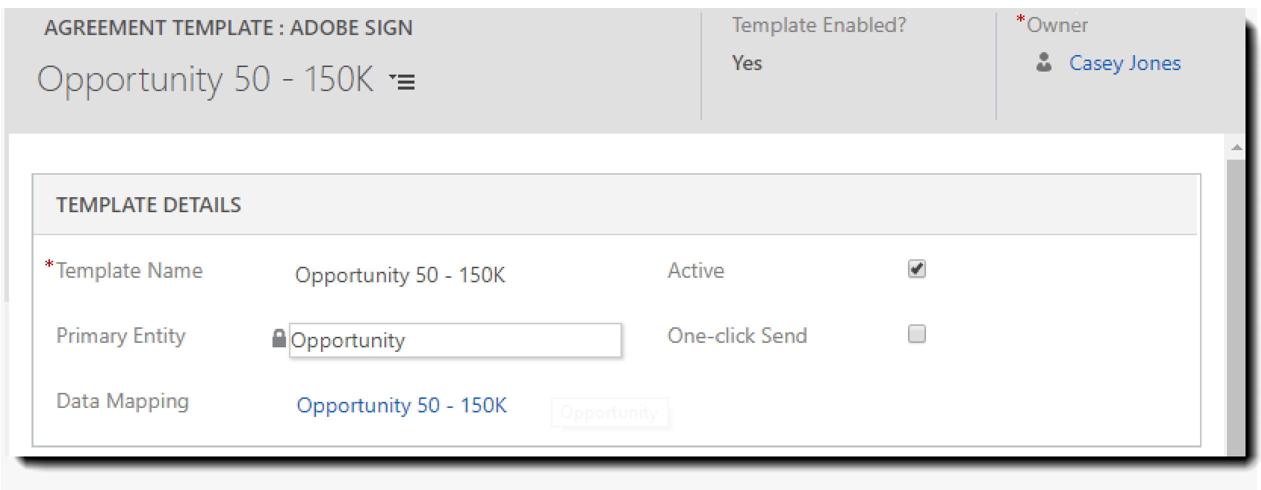


The Agreement Template is divided into six sections, each containing editable values that you can configure if you have a predictable use pattern:

- **Template Details** – Defines the relationship between the major objects and if the template is active
- **Recipients List** – Allows for a pre-configured signature path for the template
- **Message Details** – The Name of the agreement and the global message
- **Attach Files** – The files, or documents, that you want to send for signature or approval
- **Agreement Options** – Several settings that allow you control over the agreement
- **Security Options** – The default security settings

Template Details

The template details show the Template - Entity - Data Map relationship for this template.



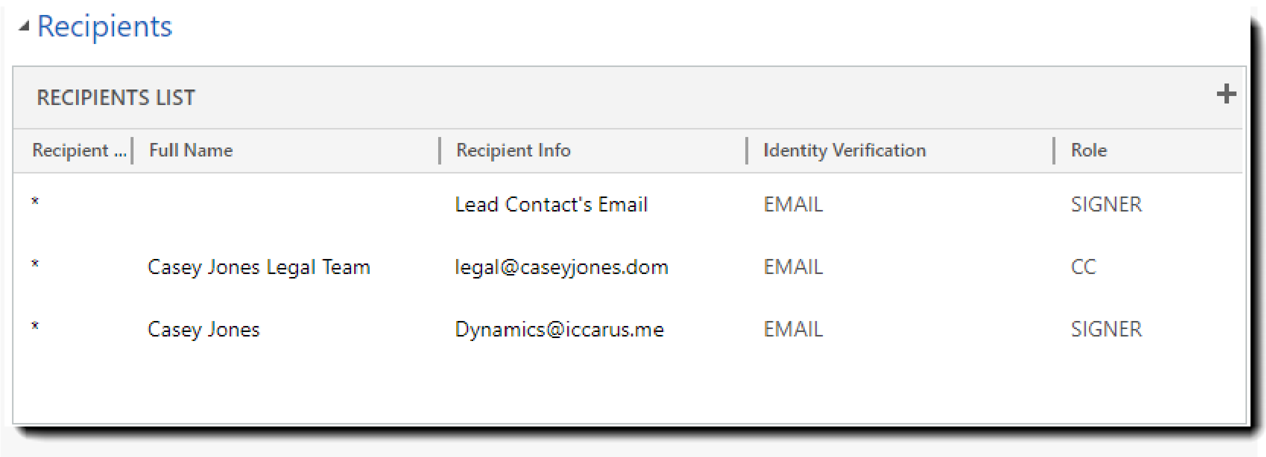
The name of the template is expressed in large font at the very top

- **Template Name** – The name of the template. This is identical to the name expressed at the top of the page
- **Primary Entity** – Templates are tied to a single entity within Dynamics. The declared entity is the only entity that will display this template
- This value is locked once the agreement is created
- **Data Mapping** – This field indicates the name of the Data Map that is bound to the template.
- **Active** – This check box dictates if the template is available for users to select when sending from the primary entity
- **One-click send –** If enabled, the template automatically sends the agreement when the template is selected.

- For example: You have an NDA template designed with Contact as the primary entity, and the recipient's section is configured to import the Contact's email.
- The Sender only needs to select the NDA template from the Contact they intend to send it to. The configuration phase is skipped, and the agreement is sent without further interaction.
- If no recipient is configured, *One-click* is ignored, and the agreement opens for manual configuration

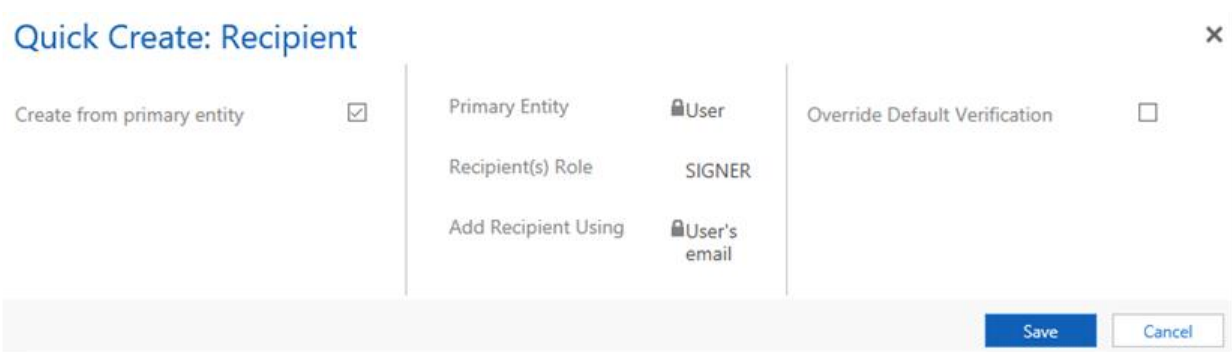
The Recipients section:

The Recipients section contains the list and signing order of recipients that you want to pre-configure for the template.

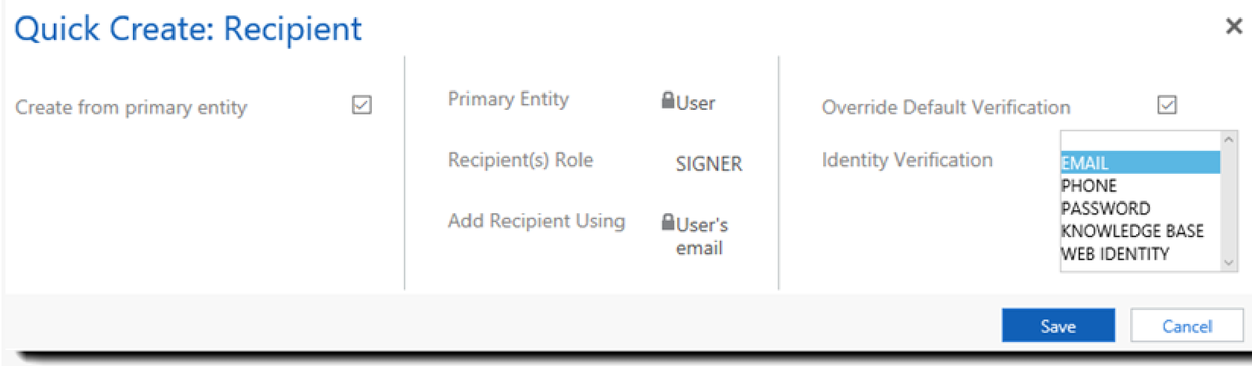


Recipients – You can hard code a recipient list within a template by clicking the plus icon on the far right of the window. A pop-down opens exposing the configuration options.

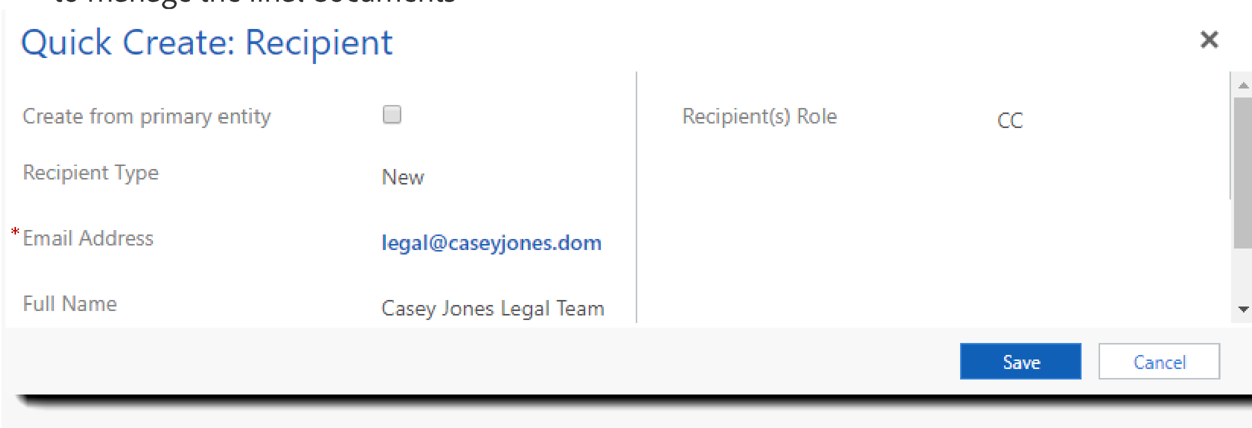
- By default, the recipient list is left empty for the Sender to manually populate when configuring their agreement
- Adding a default recipient must be done explicitly by clicking the plus, and then saving the default values presented with *Create from primary entity* enabled



- The Override Default Verification option allows you to escape the default verification method (set in the *Security* section) and apply a different verification method for just this recipient.

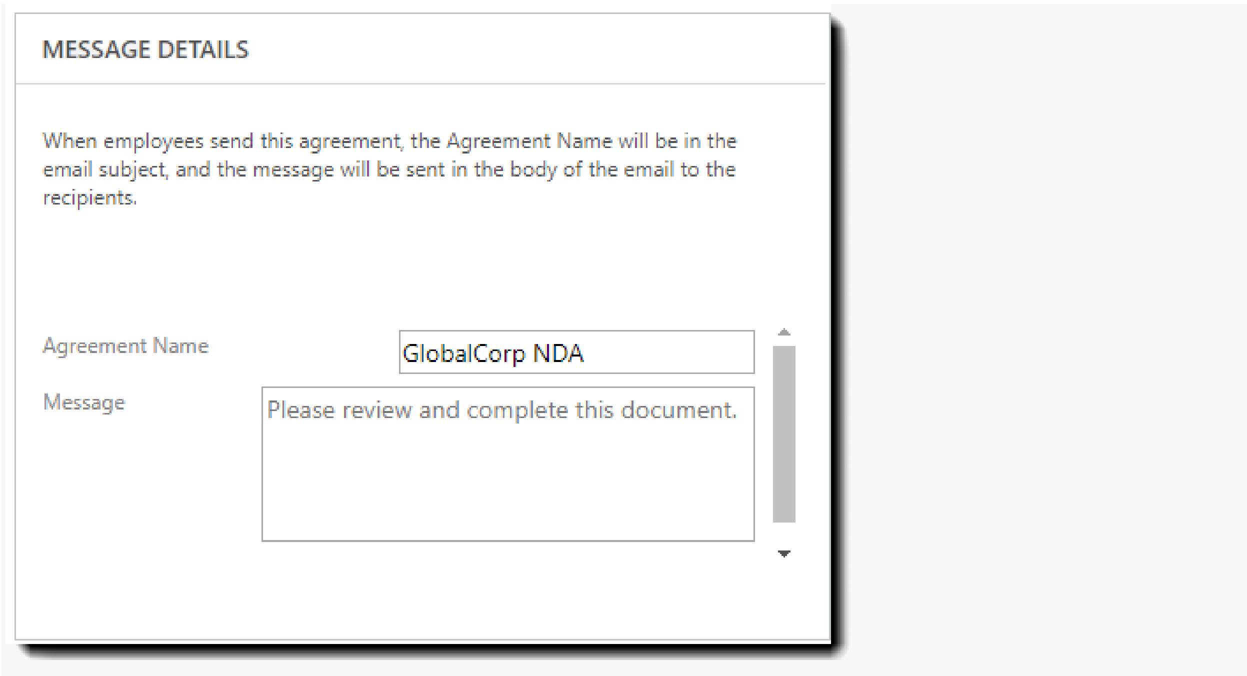


- Adding additional recipients (e.g. internal counter-signature process), or recipients that aren't involved in the signature process, only requires that you uncheck the *Create from primary entity* box, and then define the recipient. An excellent option for CCing teams that only need to manage the final documents

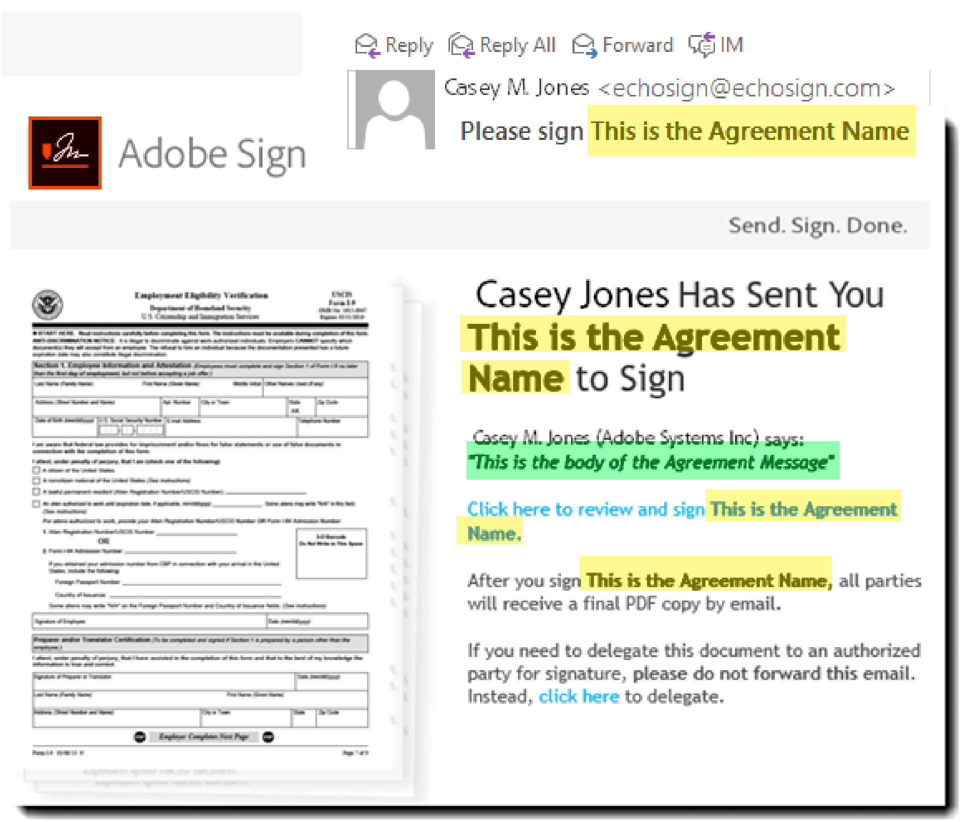


Message Details

The Message Details section contains the Agreement Name and global Message.



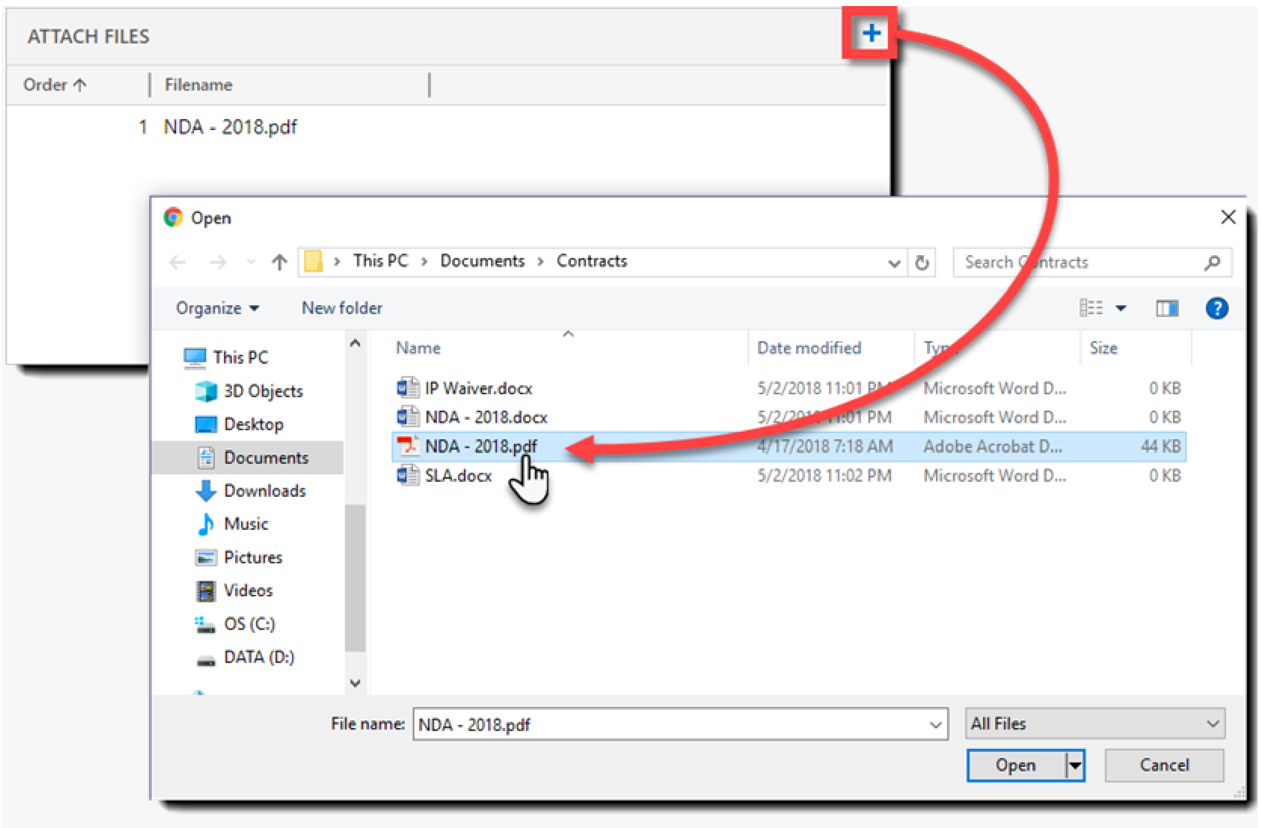
- **Agreement Name** – The Agreement Name is prominent in the notification process, surfacing in the email subject line, in bold font in the email body, and in smaller font throughout the boilerplate description (seen in yellow highlight below)
- **Message** – The Message field is an open plain text field where you can insert any message or instructions to the signer (seen in green highlight below)



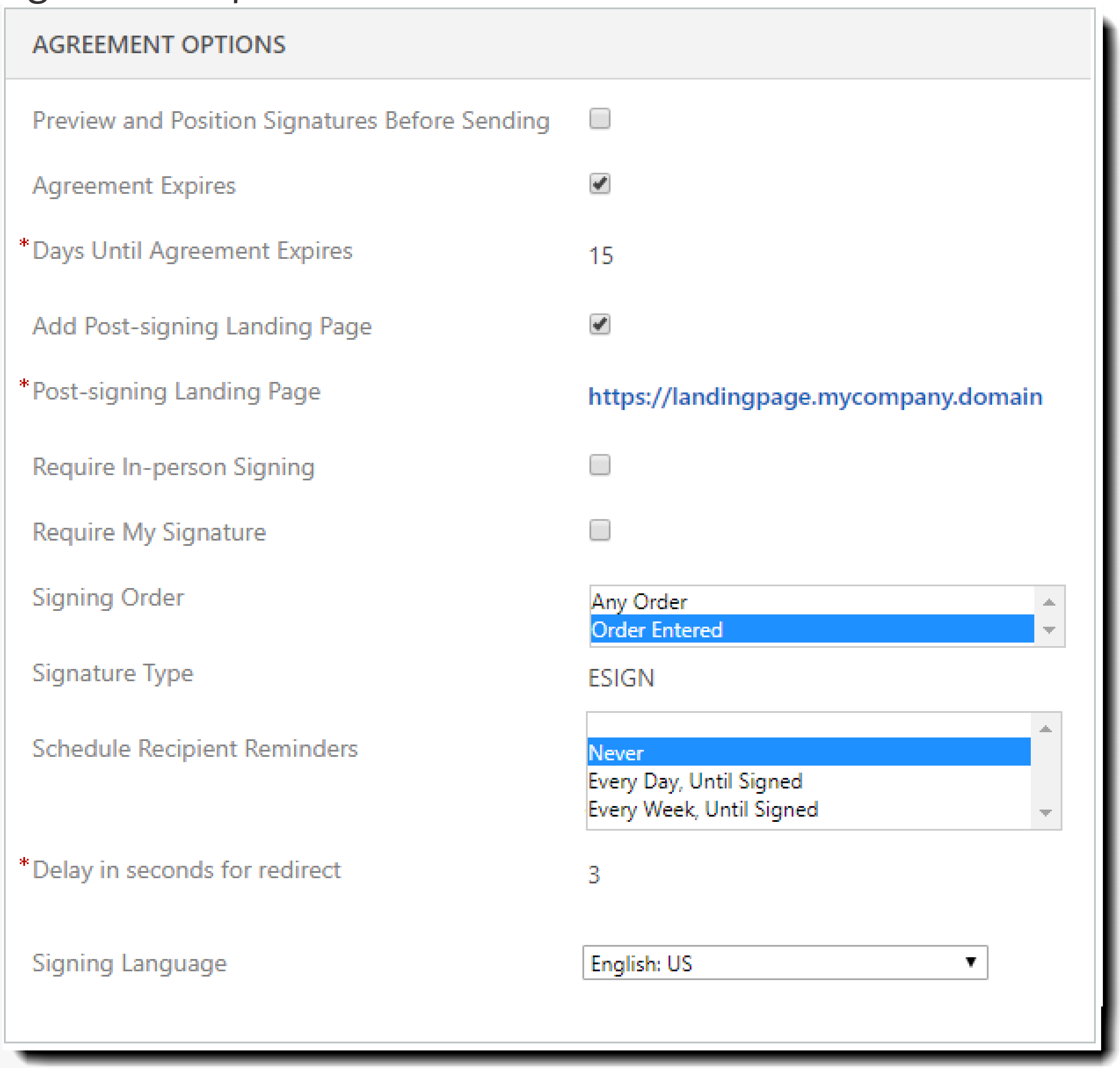
Note:
Both the *Agreement Name* and *Message* fields permit the insertion of Dynamics field values, to improve personalization for the recipient. To open a list of possible values, type a left brace: {

Attach Files

This section allows you to pre-attach a file for the agreement. For example, if you create a template for an NDA, then you can attach the company NDA file directly in the template so the sender doesn't have to.

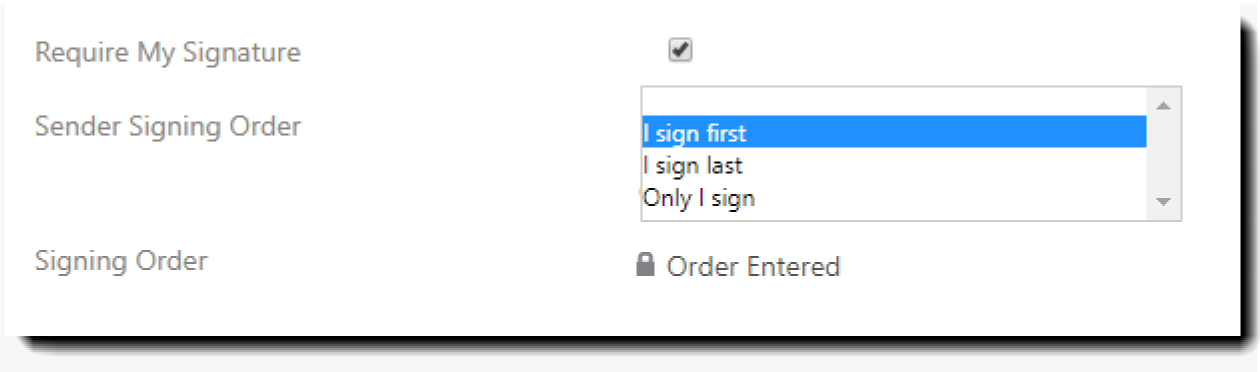


Agreement Options:



- **Preview and position signatures before sending –** When checked, the agreement automatically opens the authoring environment so the sender can place form fields
- **Agreement expires** – If checked, the agreement defines a termination date when the agreement expires
- **Days until agreement expires** – This defines the number of days the agreement remains signable when the *Agreement expires* feature is enabled
- **Add post-signing landing page** – When enabled, you can dictate what URL the recipient is routed to after they complete their interaction with the agreement
- **Post-signing landing page** – This field contains the URL for the page you want to direct recipients to when *Add post-signing landing page* is enabled

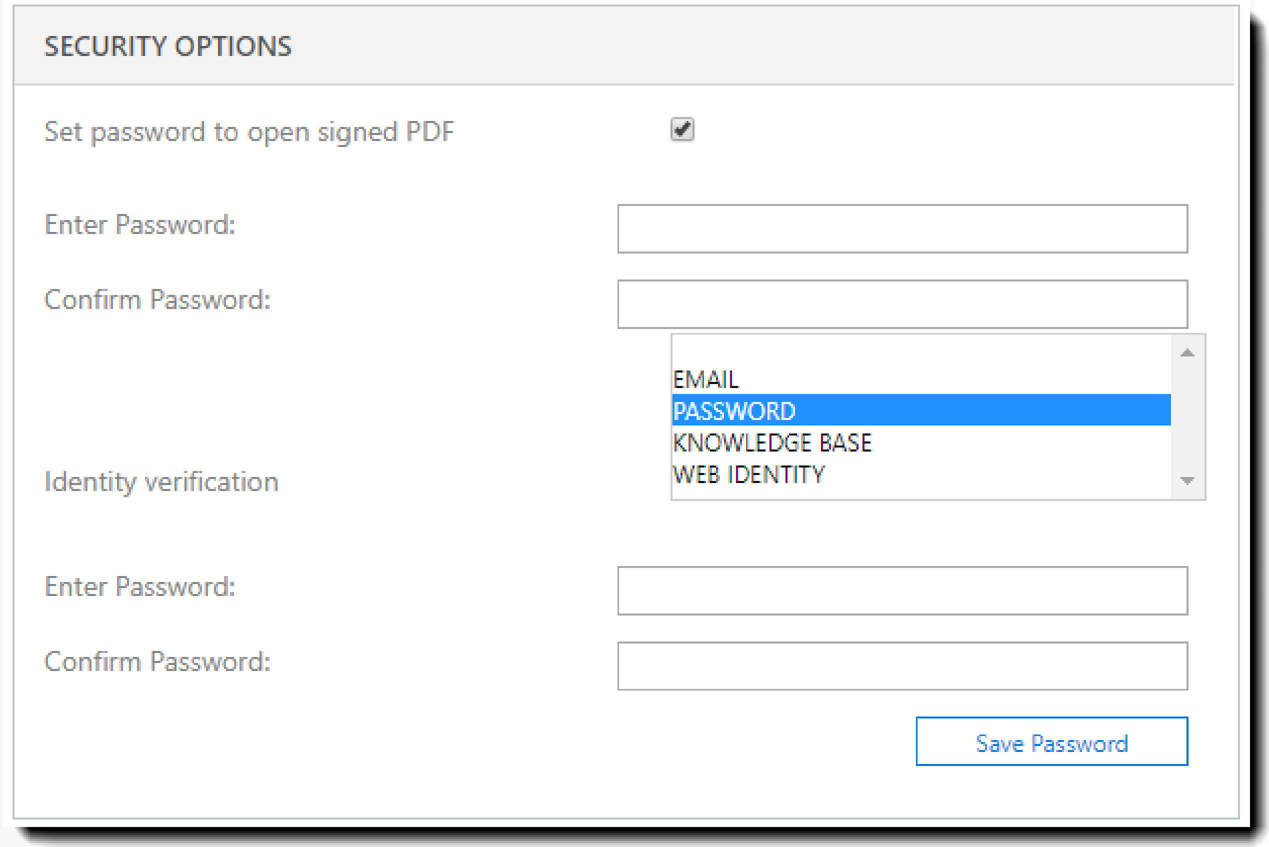
- **Require In-person signing** – If you need to have the signer sign on the sender's local system or tablet without involving email, senders can host the signature using this option
- **Require My Signature** – Used when the sender will be part of the signature process
  - The sender must sign first, last, or be the only signer
  - The signing order will be *Order Entered*



- **Signing Order** – Choose between two workflows for getting your document signed
- **Any Order** notifies all signers at one time and allows them to sign without waiting on anyone else
- **Order Entered** enforces a strict sequential signature process based on the order you define the signers on the agreement
- **Signature Type** – Choose the format in which you want the document signed
- **ESIGN** routes your agreements to be signed electronically using email and expects the recipients to sign electronically
- **WRITTEN** delivers your documents via email, prompting the signer to print the document and physically sign it. Then they must upload the document back to Adobe Sign system using the same email link.
- **Schedule recipient reminders** - Defines a reminder cycle for the transaction. Reminders can be configured to be sent to the current recipient on a daily or weekly cycle
- **Delay in seconds for redirect** – Required when a *Post-signing landing page* is defined, this setting dictates how much delay should be observed after the signature is applied and before the recipient is re-directed to the designated landing page.
- **Signing Language** – This setting defines the language used when the agreement is sent to the signer. All email and on-screen prompts/instructions for the signer are in the language chosen

Security Options

This section defines the default verification method for the recipients, and the optional password for the final PDF document



- **Set password to open signed PDF** – Enable this if you would like to apply a password to the final document to prevent un-authenticated access
- **Identity Verification** - Defines the second-factor verification to authenticate the recipient
- **Email** – No second-factor verification is applied
- **Password** – Standard alphanumeric password field. When used, the sender must communicate the password to the signer out of band
- **Knowledge base** – Knowledge base authentication uses public databases to ask the signer several questions about their past to verify their identity
- **Web Identity** - Social media is used to apply a second authentication

Adobe Sign for the Sales Hub

If your company has deployed Dynamics CRM version 9.0 or later, you have access to the Adobe Sign functionality on the Dynamics Sales Hub also.

The Sales Hub offers the same functionality with improved formatting, allowing direct access for phones, tablets, and any other mobile device.

Note:

The LinkedIn Sales Navigator currently is not available in the Sales Hub.

Adobe and Microsoft engineers are investigating how to improve this in future updates.

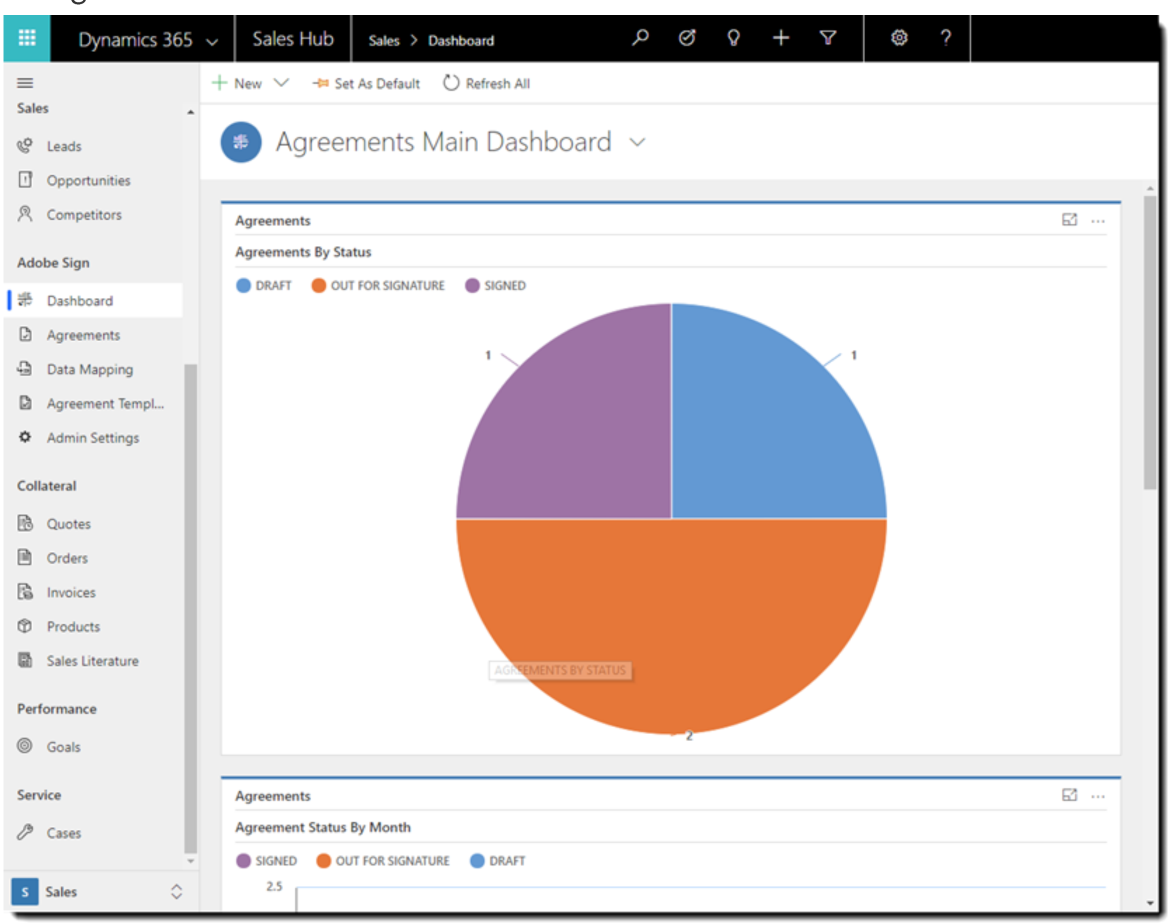
Sales Hub: Dashboard

The Sales Hub Dashboard gives you a quick graphical report of the agreements associated to your user.

The reports allow you to drill down in to each element and produce new graphs specific to that sub-set of data.

The page is broken out into three default sections:

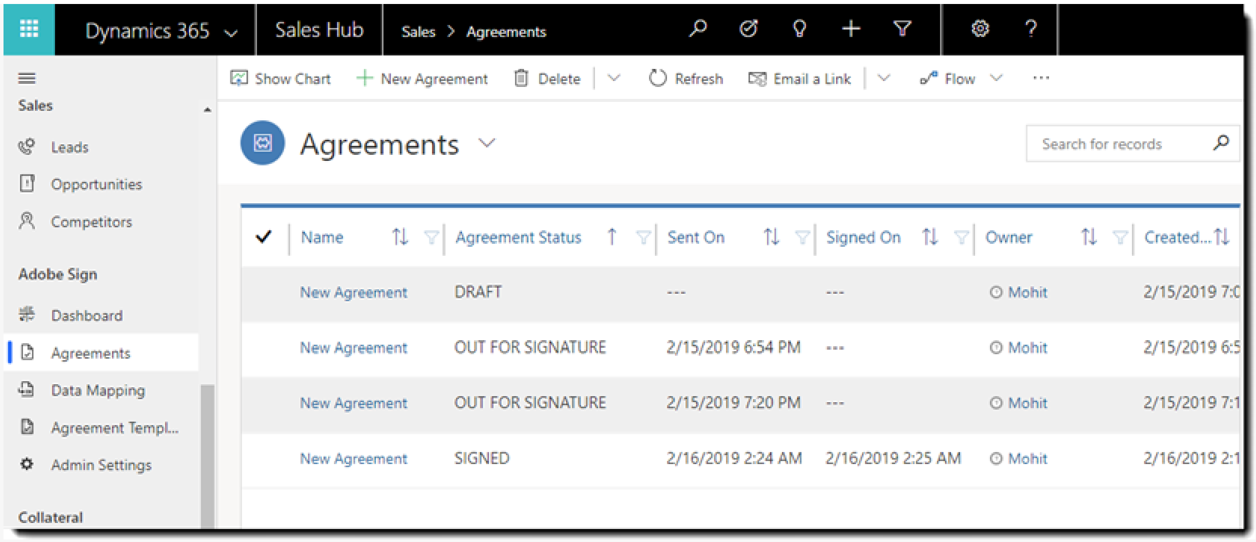
- Agreements by status
- Agreement status by month
- Agreements sent out this week



Sales Hub: Agreements

The Agreements section gives you a full listing of your agreements as well as the ability to sort the Agreements by their meta-data (status, creation date, signed date, etc).

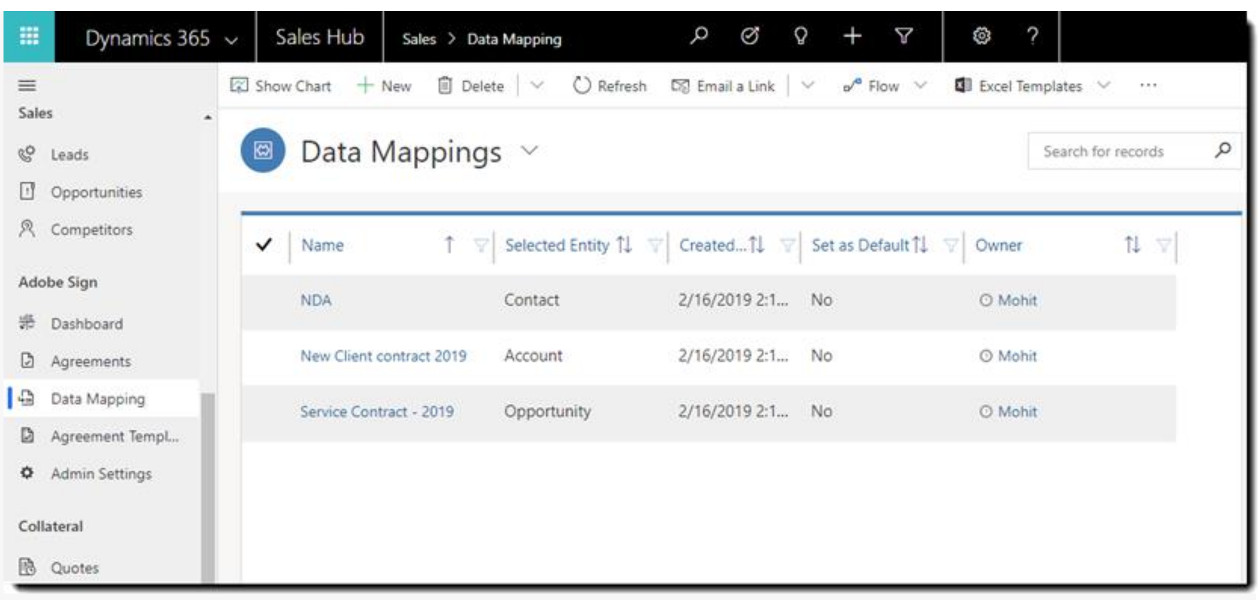
It is also possible to create a new Agreement as needed.



Sales Hub: Data Mapping

Users that have access to Data Mappings can sort, review, and edit existing Data Mappings.

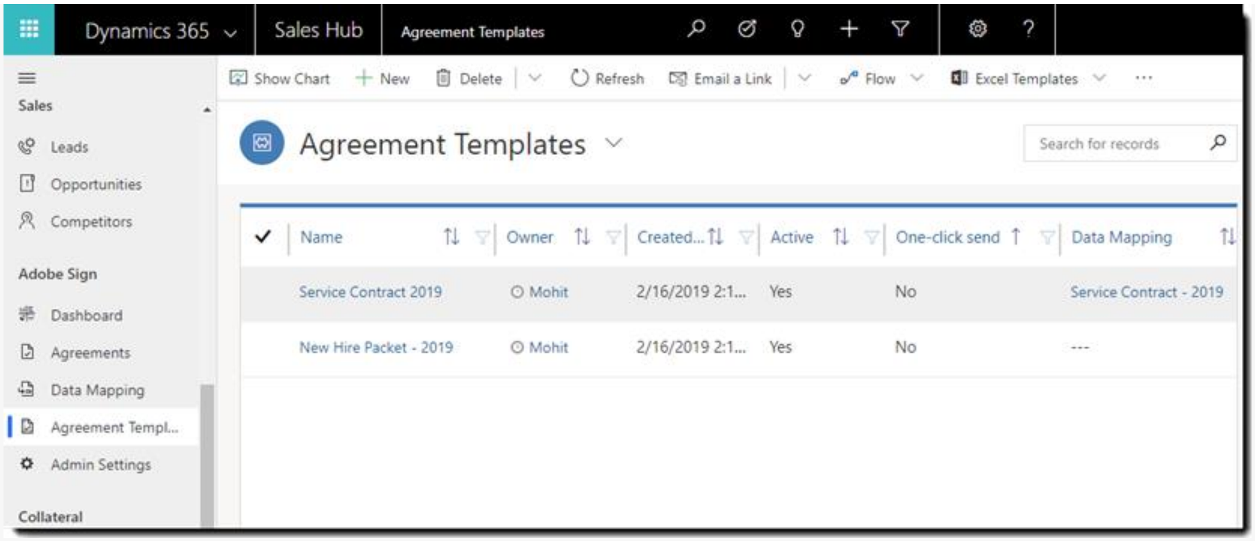
New Data Maps can also be created.



Sales Hub: Agreement Templates

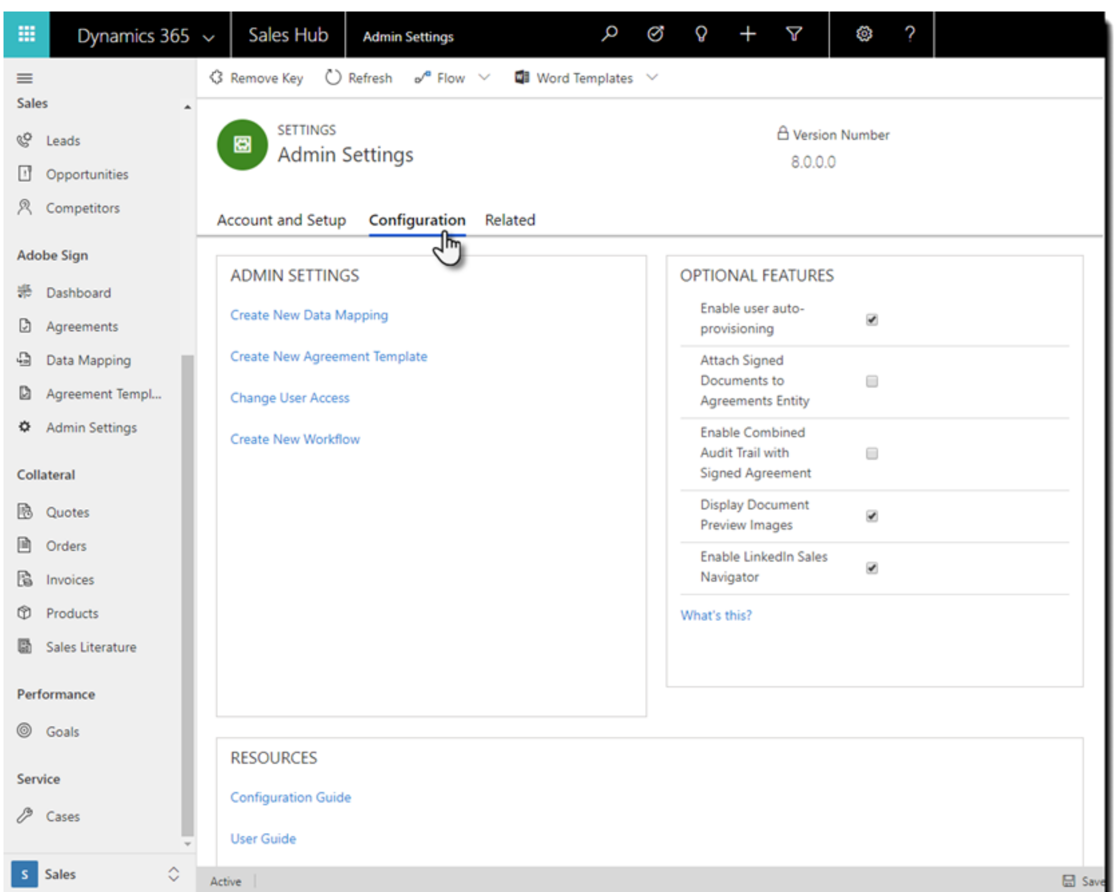
Users that have the system authority to access Templates can review, sort and edit existing templates.

New Agreement Templates can also be created.



Sales Hub: Admin Settings

Dynamics Administrators can access and edit the admin level settings for the Adobe Sign integration.



Adding Custom CRM Entities to Adobe Sign

Adding custom CRM entities to use Adobe Sign

Several built-in CRM entities are included in the Adobe Sign package that you can relate your agreements to:

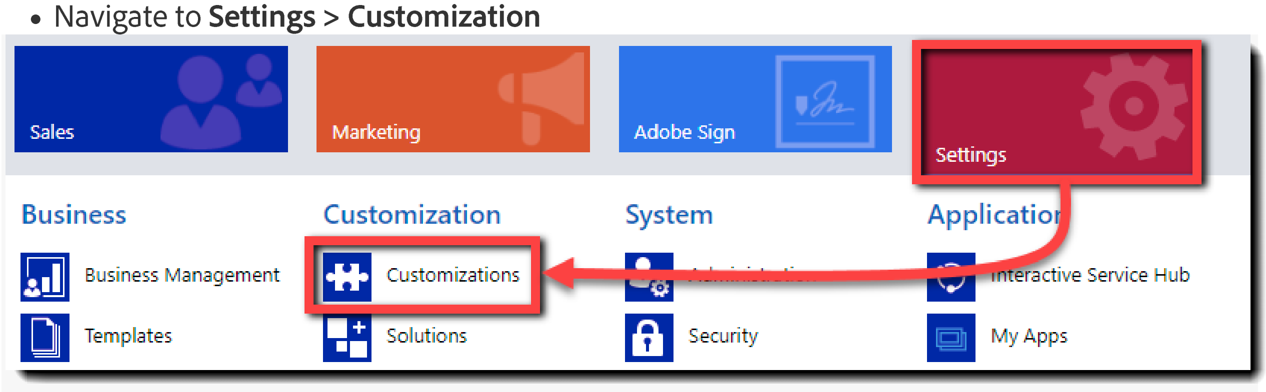
- Contacts
- Accounts
- Leads
- Opportunities
- Quotes
- Invoices
- Orders
- Contracts

You can add your custom CRM entity (or any other built-in CRM entity) to this scope, by following a few steps.

Note:
Custom entities can only start an agreement from the *Send for Signature* menu item.
You can not use the *Quick Create* system to start an agreement from a custom entity.

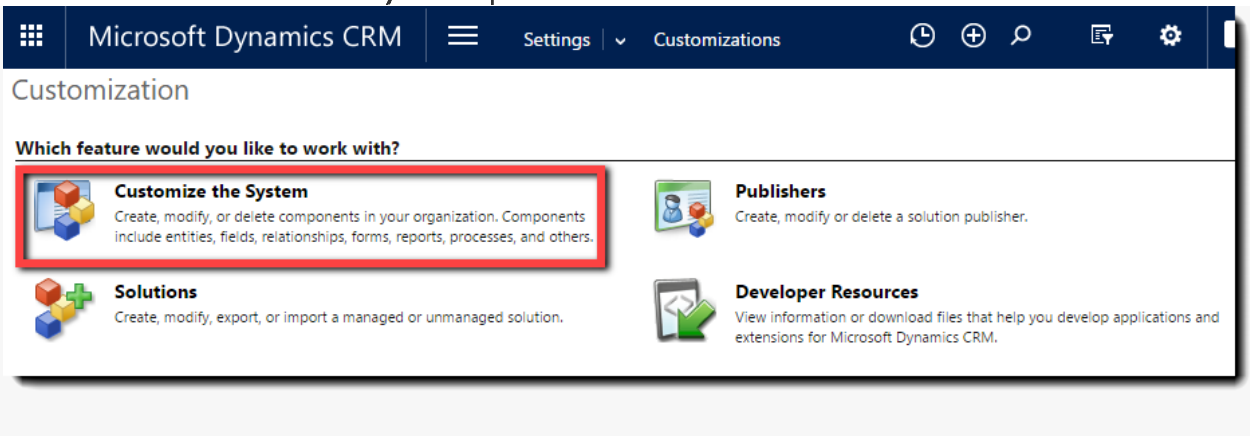
For our example, let's assume there is a custom CRM entity called "Customer".

- Navigate to **Settings** > **Customization**



The *Customization* page loads

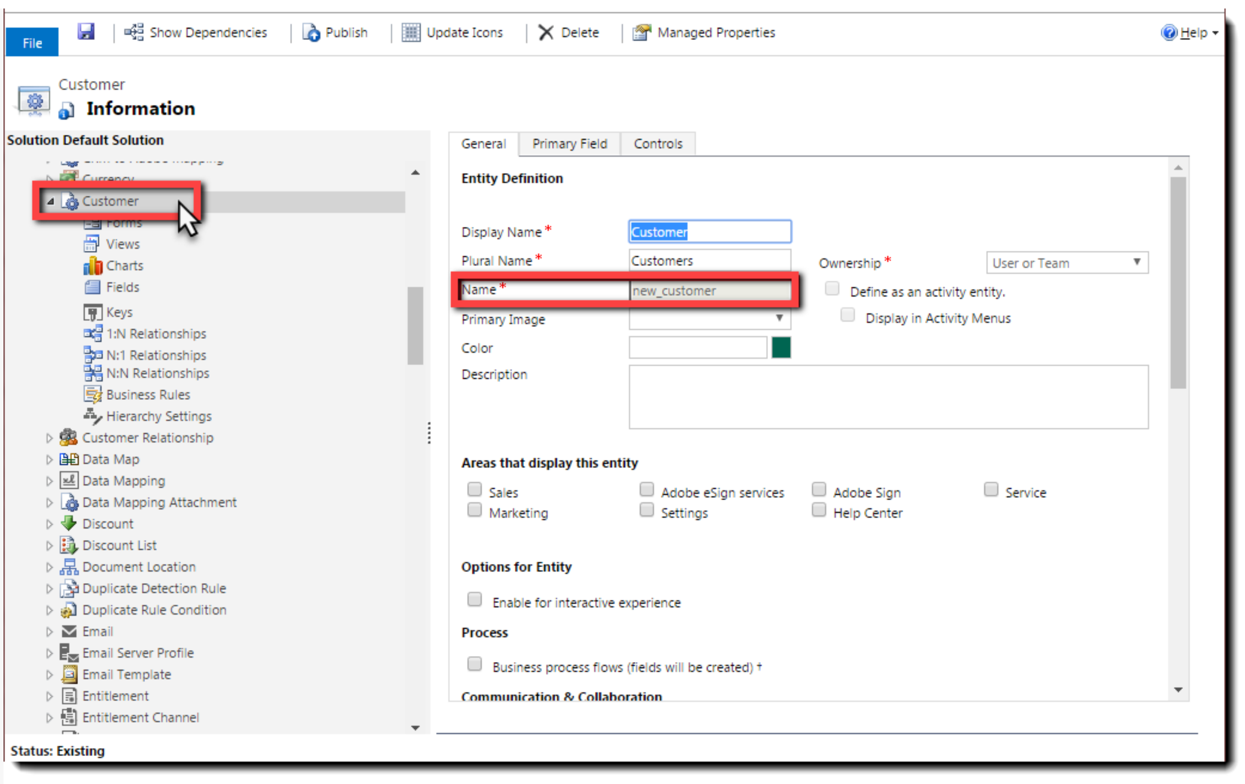
- Click the **Customize the System** option



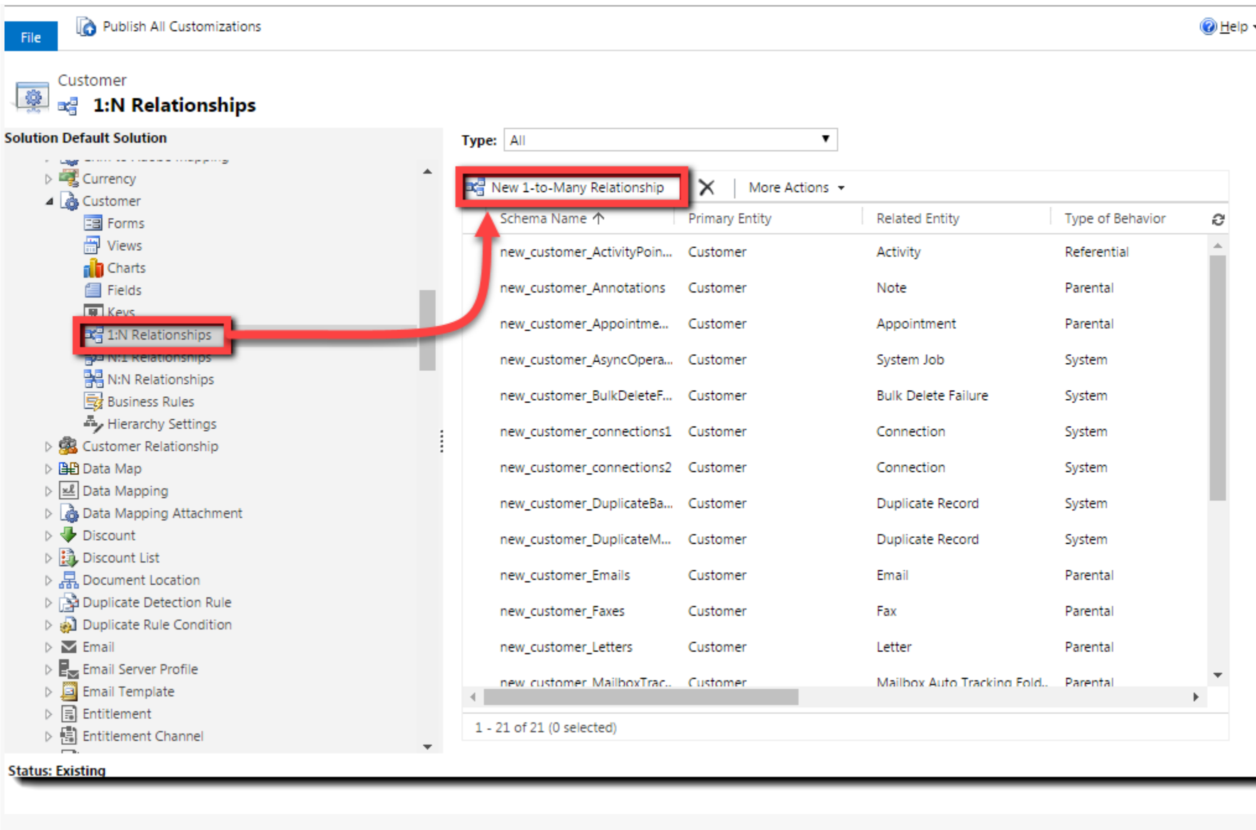
The *Default Solution* page opens in a separate window

In the left side rail under **Components**

- Expand the **Entities** list
- Find the custom entity ("Customer" in this case) and expand it
- Single click the name of the Entity to display the fields and controls



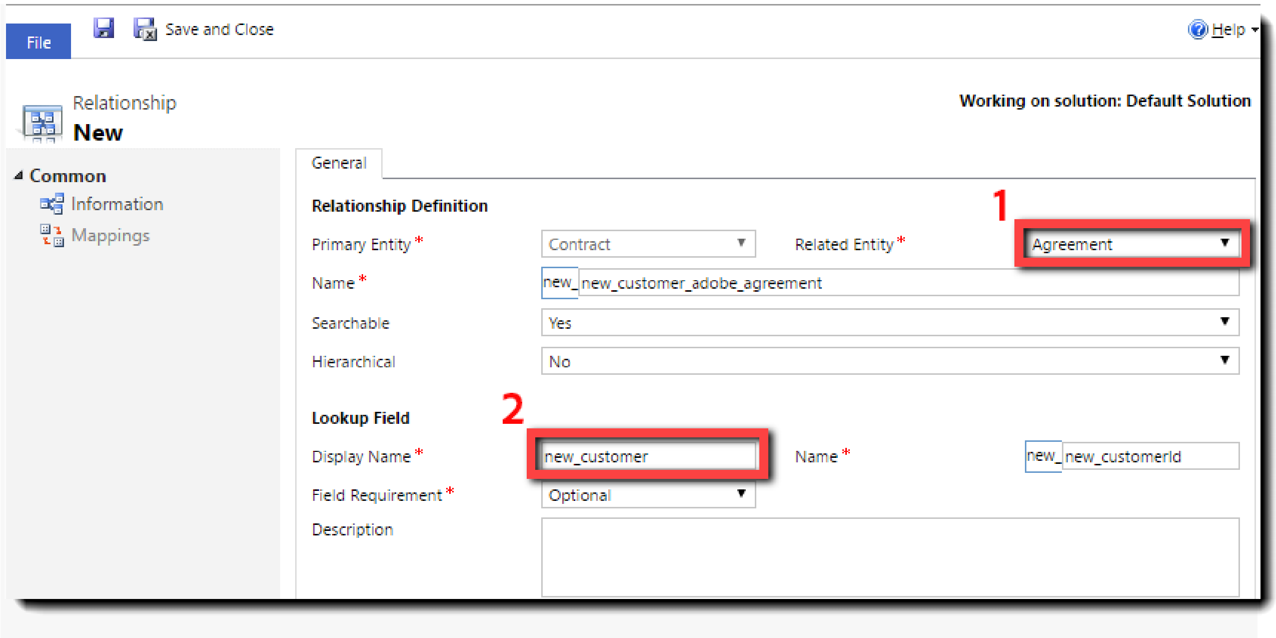
- **Copy** the value from the *Name* field (in this example the value is “new_customer”).
    - This is the internal system name of your custom Entity.
- Navigate to the *1:N Relationships* option, under your custom Entity
- Click the **New 1-to-Many Relationship** button



A new *Relationship* window opens

Create the new relationship:

1. Choose **Agreement** from the *Related Entity* field
   - The Name field changes to show {entityName}_adobe_agreement



2. **Paste** the name of your custom entity ("new_customer" in our example) into the *Display Name* field.
   - The *Name* field changes its value to be "new_" + {entityName} + "Id". (new_new_customerID)
3. Click **Save and Close**
   - The *Relationship* window closes
   - Click **Publish All Customizations** at the top of the *1:N Relationships* page