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# Adobe Sign for Microsoft Dynamics 365 CRM

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## User Guide

v8

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## Overview

Adobe Sign integration to Dynamics offers a plug-and-play solution to obtain signatures for any form/contract documentation needed. This integration provides the following benefits:

- Adobe Sign is built into CRM records such as Contacts, Accounts, Leads, Opportunities, Orders, Invoices, Quotes, Contracts, and any custom CRM entity developed by your Admin.
- Accelerates the quote-to-cash process by sending agreements—such as contracts and sales documents—from Dynamics with one click.
- Admin configurable data mapping that merges data from Dynamics entities—such as accounts and contacts— into agreements and pushes data gathered from signers during the signing process back into Dynamics.
- Enabled on mobile devices through the Sales Hub (available in 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 documentation is expressly for *Microsoft Dynamics 365 CRM 8.2* and beyond.

[Please refer to the v6 guide](#) if you are using:

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

## Gaining Access to Adobe Sign

Adobe Sign is installed by the Dynamics administrator, and access is granted via security roles. If you require access and do not see the Adobe Sign option on your main page, contact your Dynamics administrator to request user access.



**Note:**

For Adobe Sign to properly function in Dynamics, your browser must have pop-ups enabled. If at any time you receive a message indicating “Only secure content is displayed”, click the button to **Enable all content**.

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## Sending for Signature

When the Adobe Sign integration with Microsoft Dynamics CRM is installed, a Send for Signature option is available from the **More ...** menu. You can use the **Send for Signature** option to send agreements for signature from a Dynamics Entity or from the Agreements page.

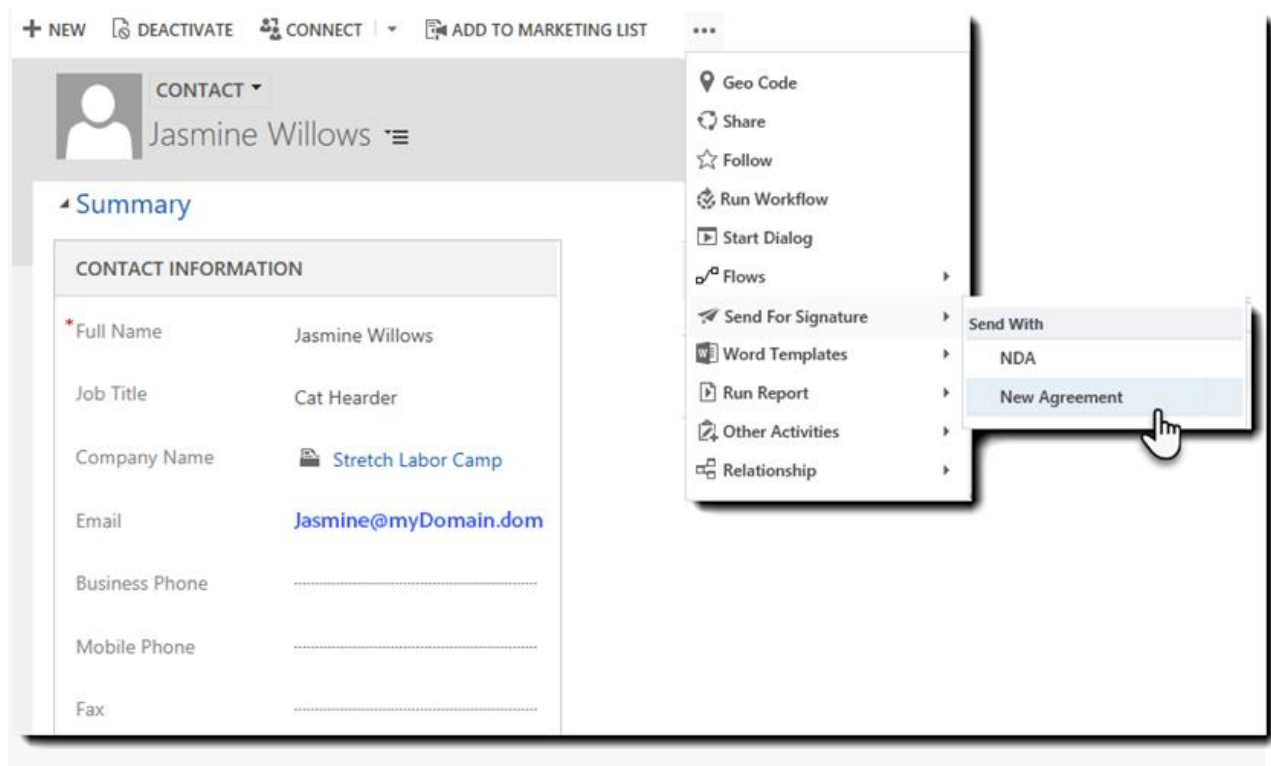
To send an agreement from an entity:

- Navigate to an entity record (e.g., Opportunity, Account) within CRM and click to open it
- Click the **More Commands (...)** menu
- Select **Send for Signature** from the menu

**Note:**

Reusable templates can be created, by the Dynamics administrator, for any recurring processes that have a predictable workflow. These templates are listed (alphabetically) in a sub-menu after you click *Send For Signature*.

At the bottom of the template list is **New Agreement**, for agreements that aren't predicated on a template.



A new Agreement page opens, and any field values that are defined on the Agreement Template automatically populate.

To define and send an agreement you need only a few things:

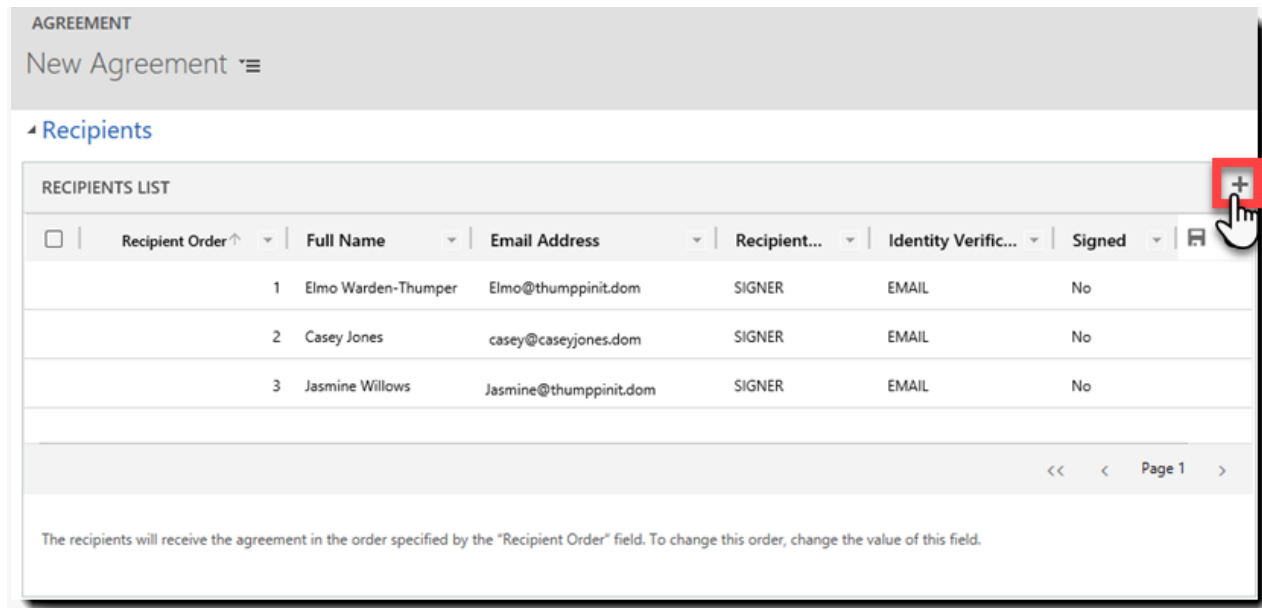
- A Recipient – The person or list of people that you need to sign or approve the document
- An Agreement Name – How the Agreement is highlighted in the subject line of the signer's email as well as internal reporting
- A document that needs to be signed – This can be one or more form, contract or any other document that requires a legal signature

## The Recipient section

One or more signers need to be defined in the Recipient section. Enter the recipients in the order you want them to sign the document. If you make a mistake, you can edit the **Recipient Order** field on the left side of the recipient list.

To define a recipient:

- Click the plus icon on the right of the window



AGREEMENT  
New Agreement

Recipients

| Recipient Order | Full Name           | Email Address          | Recipient... | Identity Verific... | Signed |
|-----------------|---------------------|------------------------|--------------|---------------------|--------|
| 1               | Elmo Warden-Thumper | Elmo@thumppinit.dom    | SIGNER       | EMAIL               | No     |
| 2               | Casey Jones         | casey@caseyjones.dom   | SIGNER       | EMAIL               | No     |
| 3               | Jasmine Willows     | Jasmine@thumppinit.dom | SIGNER       | EMAIL               | No     |

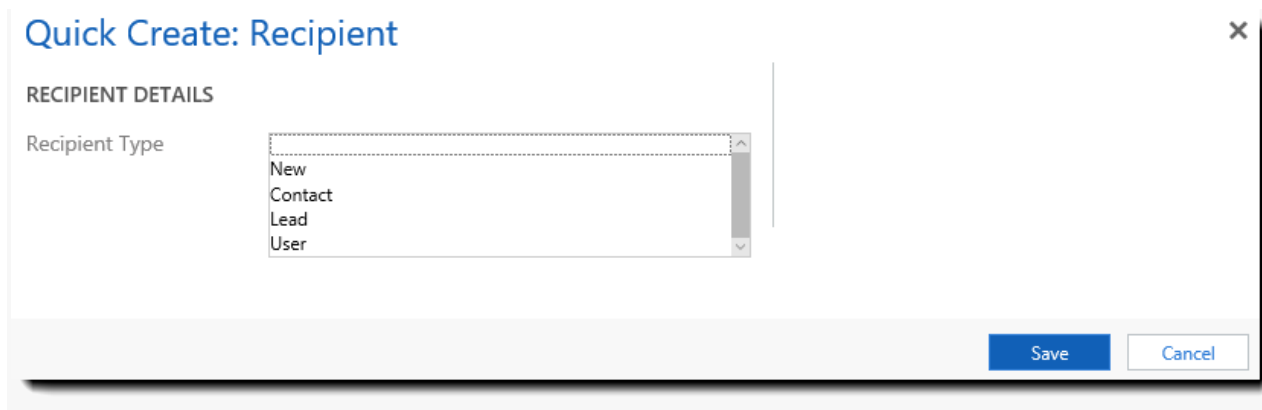
<< < Page 1 > >>

The recipients will receive the agreement in the order specified by the "Recipient Order" field. To change this order, change the value of this field.

This drops down an overlay where you can select the type of signer/approver:

1. Select the proper value from the Recipient Type picklist

- **New** – When the recipient isn't a known value in Dynamics
- **Contact** – For recipients that are defined Contact entities in Dynamics
- **Lead** – For recipients that are defined as Leads in Dynamics
- **User** – This describes internal users of your Dynamics environment



Quick Create: Recipient

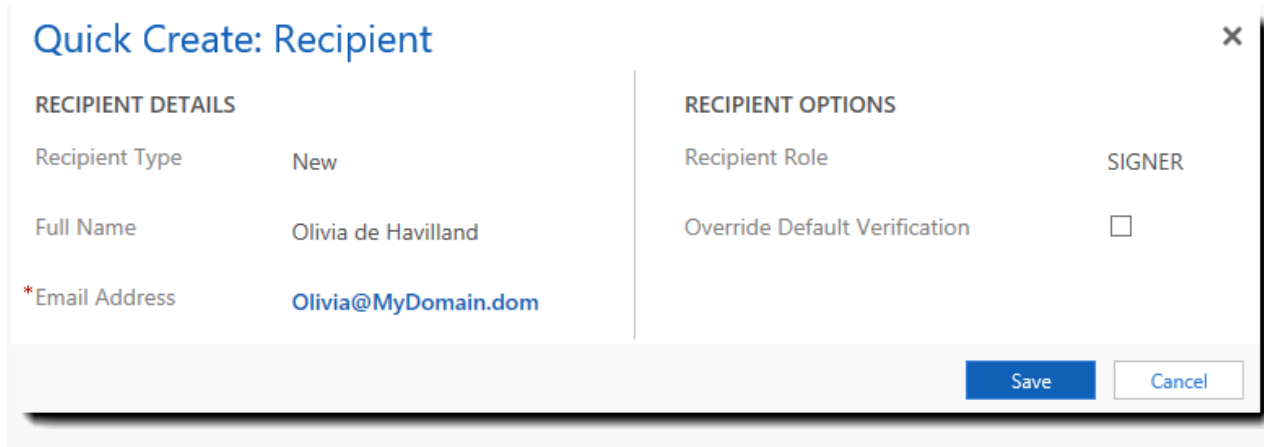
RECIPIENT DETAILS

Recipient Type

- New
- Contact
- Lead
- User

Save Cancel

2(a). Selecting **New** changes the overlay to allow you to enter a Full Name and an Email Address. This action will **not** save a new Contact/Lead to Dynamics, it only uses the name and email for the purpose of this transaction.



The dialog box is titled "Quick Create: Recipient" and has a close button (X) in the top right corner. It is divided into two main sections: "RECIPIENT DETAILS" and "RECIPIENT OPTIONS".

| RECIPIENT DETAILS |                     |
|-------------------|---------------------|
| Recipient Type    | New                 |
| Full Name         | Olivia de Havilland |
| *Email Address    | Olivia@MyDomain.dom |

| RECIPIENT OPTIONS             |                          |
|-------------------------------|--------------------------|
| Recipient Role                | SIGNER                   |
| Override Default Verification | <input type="checkbox"/> |

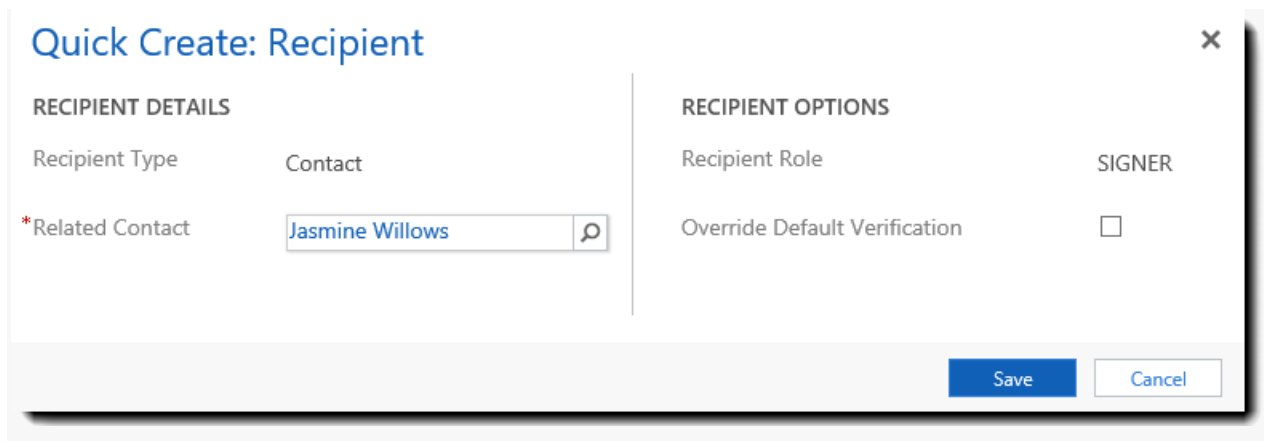
At the bottom right, there are two buttons: "Save" (in blue) and "Cancel" (in white with a blue border).

**Note:**

The default verification is defined either on your Agreement Template or at the account level if you have not defined a setting on your template. If you need to override the default, check the **Override Default Verification** checkbox. This action exposes a picklist where you can select a different verification process.

2(b). Selecting **Contact**, **Lead**, or **User** changes the overlay to search for the specific entity you chose. Type in the name (or part of it) and then click the search icon to pick the specific recipient you want to include.

Because Dynamics understands these types of entities, the email address is imported from the database.



The dialog box is titled "Quick Create: Recipient" and has a close button (X) in the top right corner. It is divided into two main sections: "RECIPIENT DETAILS" and "RECIPIENT OPTIONS".

| RECIPIENT DETAILS |                                      |
|-------------------|--------------------------------------|
| Recipient Type    | Contact                              |
| *Related Contact  | Jasmine Willows <input type="text"/> |

| RECIPIENT OPTIONS             |                          |
|-------------------------------|--------------------------|
| Recipient Role                | SIGNER                   |
| Override Default Verification | <input type="checkbox"/> |

At the bottom right, there are two buttons: "Save" (in blue) and "Cancel" (in white with a blue border).

All options allow you to designate the Recipient Role. The roles are:

- **Signer** (default) – Signers are required to apply at least one signature to the agreement.
- **Approver** – Approvers are not required to sign the agreement (although they can if signature fields are placed for them), but they have to actively “Approve” the agreement, which is a logged event.
- **CC** – Carbon Copied (CC'd) parties are included in the notification process of the agreement, but have no interaction with the agreement or signature cycle.

3. Once you have the recipient defined, click **Save**

4. Repeat 1-3 for all of signers/approvers required

**AGREEMENT**  
New Agreement

**Recipients**

| Recipient Order | Full Name           | Email Address          | Recipient... | Identity Verific... | Signed |
|-----------------|---------------------|------------------------|--------------|---------------------|--------|
| 1               | Elmo Warden-Thumper | Elmo@thumppinit.dom    | SIGNER       | EMAIL               | No     |
| 2               | Casey Jones         | casey@caseyjones.dom   | SIGNER       | EMAIL               | No     |
| 3               | Jasmine Willows     | Jasmine@thumppinit.dom | SIGNER       | EMAIL               | No     |

Page 1

The recipients will receive the agreement in the order specified by the "Recipient Order" field. To change this order, change the value of this field.

**Note:**

Recipients (by default) are granted access to the agreement in the order they are placed in your recipient list. You can edit the order of the signers/approvers by changing the Recipient Order values on the left side of the list. The recipients automatically re-stack in the order that you have input.

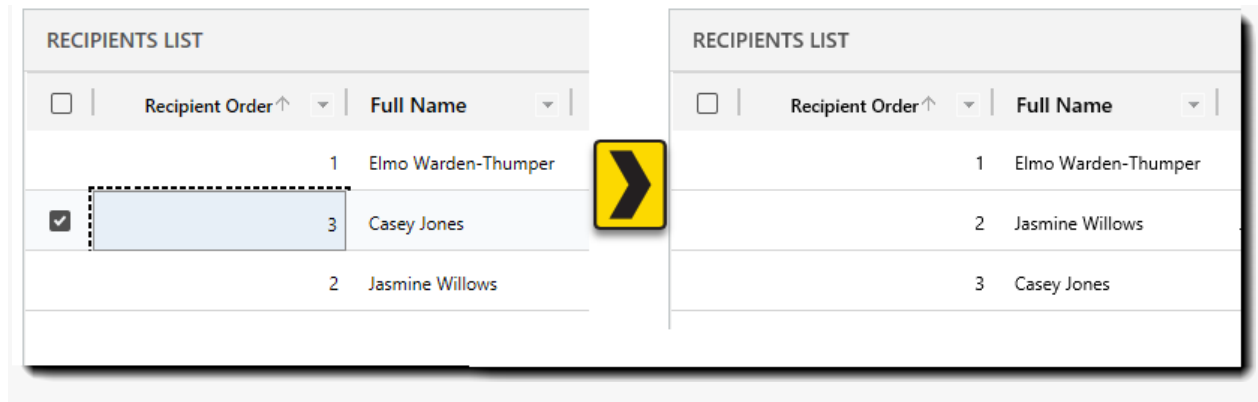
### Changing the recipient order

Single click the number to the left of the recipient name. The number value becomes editable. Change it to the number you want the recipient to be in the signature process. The other recipients will adjust accordingly.

**Note:**

The Recipient Order field is only available if the *Signing Order* field is set to **Order Entered**. If the *Signing Order* is **Any Order**, the *Recipient Order* column is not exposed in the interface.



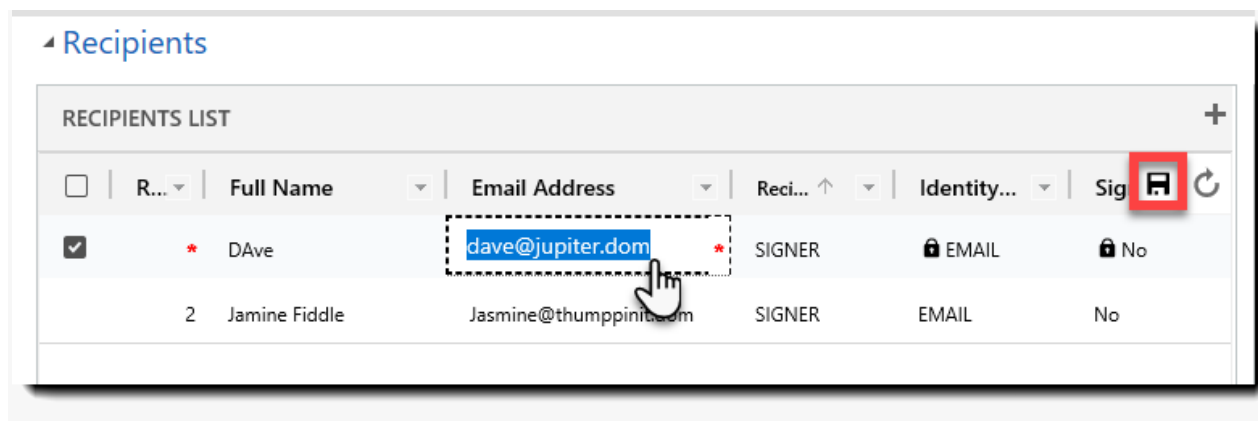


## Editing the recipient values

You can edit any recipient value that isn't locked (as indicated by the lock icon) by single clicking the field.

This opens the field to edit or select a new picklist value.

Once the change is made, click the **Save** icon in the recipient panel.



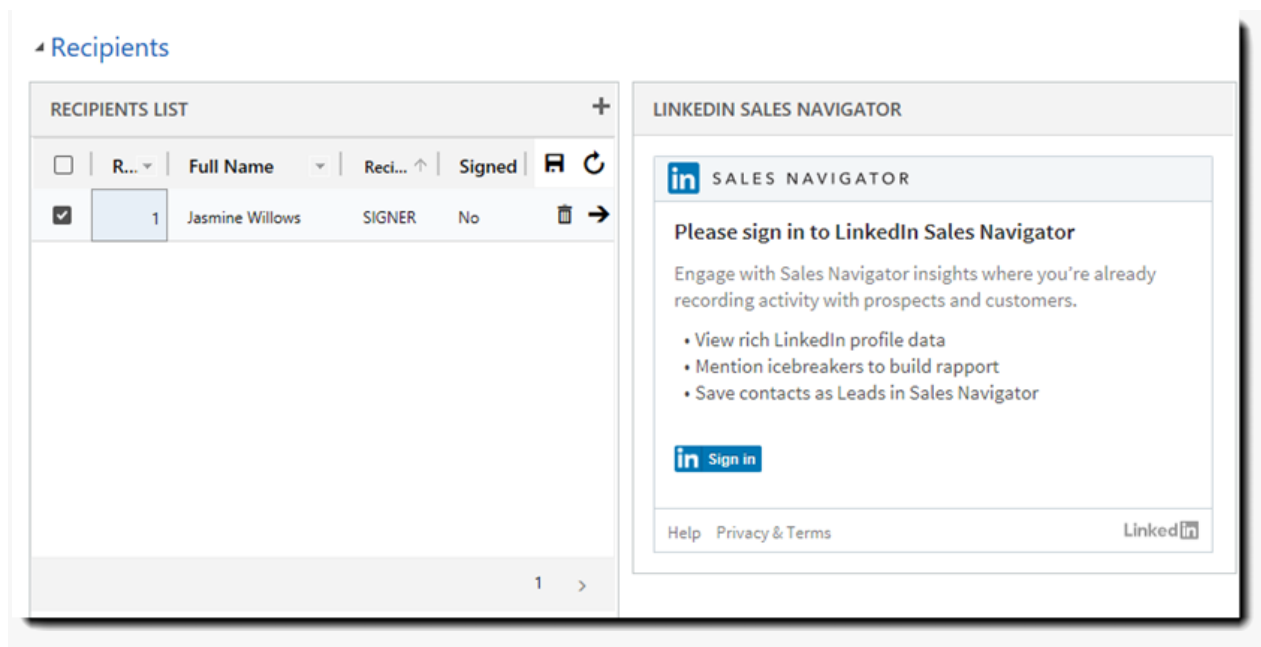
## LinkedIn Sales Navigator

To the right of the *Recipient List* is the LinkedIn Sales Navigator.

This is an optional setting that can be enabled by your Dynamics Admin if your company has access to a [LinkedIn Sales Navigator Team or Enterprise](#) account.

When enabled, you can:

- Single click any of the recipients in your recipient list
- If the email associated to that recipient is found in LinkedIn, then the profile for that user is presented in the panel just to the right of the recipient list.

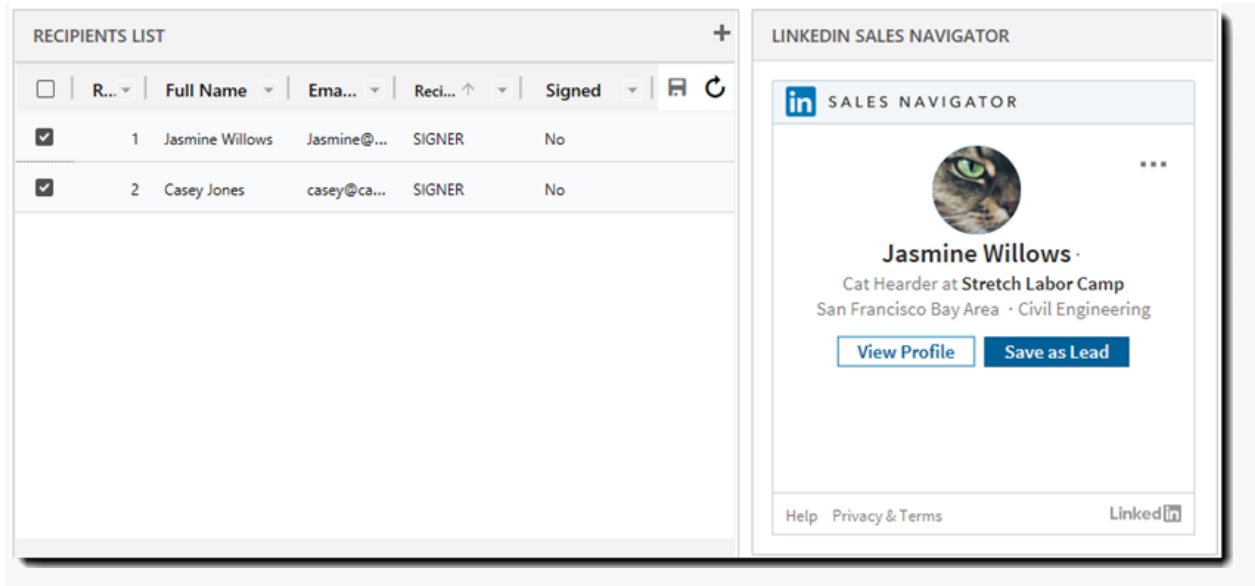


To enable the LinkedIn panel, click the **Sign In** box, and authenticate using your Team or Enterprise account.

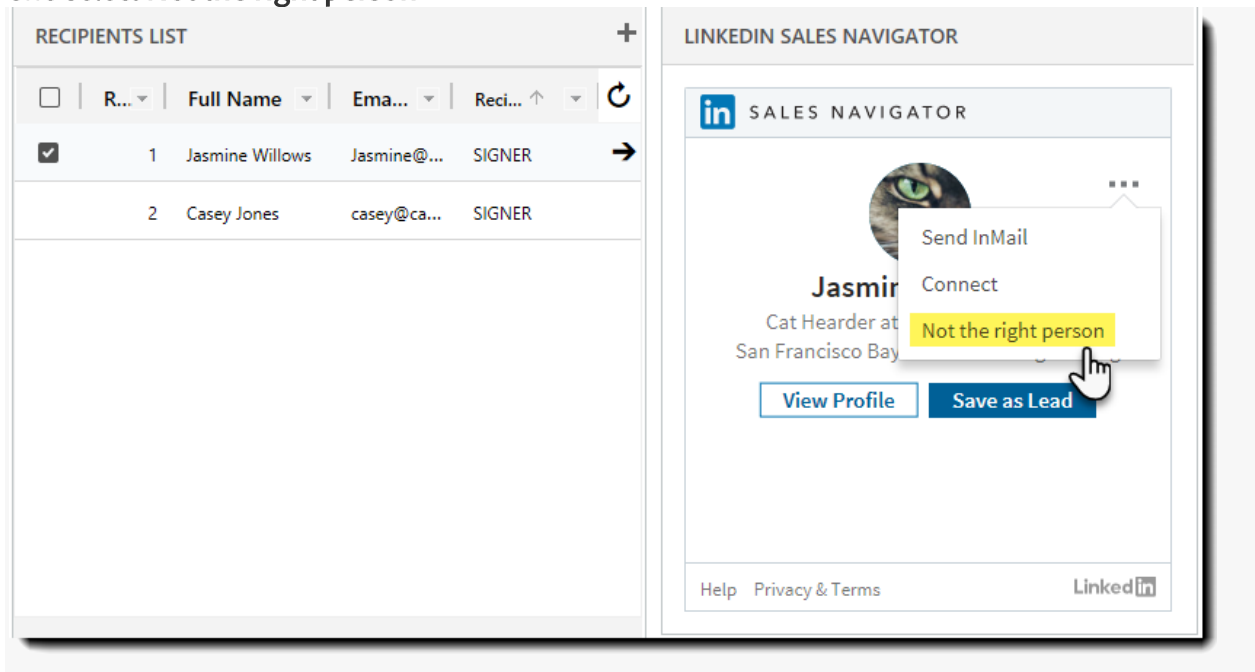
Once the authentication is established, you can select any recipient in your *Recipient List* and view their LinkedIn profile.

The application searches for the name and email of the selected recipient and presents that profile when found.

If multiple recipients are selected, only *the first one you select* is displayed:



If LinkedIn returns the wrong profile, click the More Options (...) icon in the upper-right corner and select **Not the right person**



**Note:**

Keep in mind that the LinkedIn Sales Navigator is a portal to the LinkedIn application, and as such, is subject to change as LinkedIn develops the feature.

If you click *Save as Lead*, you are saving that as a lead in the LinkedIn environment, **not** Dynamics. Same for *Send InMail* and *Connect*.

When no LinkedIn profile is found (or when you click *Not the right person*) the panel changes to allow you to enter the recipients **Current or Past Company**, and/ or **Current Title** to help identify possible profiles.

Enter the values you know, and click **Search**

**RECIPIENTS LIST**

|                                     | R... | Full Name       | Ema...      | Reci... |   |
|-------------------------------------|------|-----------------|-------------|---------|---|
| <input checked="" type="checkbox"/> | 1    | Jasmine Willows | Jasmine@... | SIGNER  | → |
|                                     | 2    | Casey Jones     | casey@ca... | SIGNER  |   |

**LINKEDIN SALES NAVIGATOR**

**SALES NAVIGATOR**

First name:  Last name:

Current or Past Company:  Current title:

[Cancel](#) [Search](#)

[Help](#) [Privacy & Terms](#) [LinkedIn](#)

If multiple potential matches are identified, there will be two navigation arrows in the upper-right corner of the panel to flip back and forth between the selected profiles.

Click **Match** to gain access to view the profile in a new tab.

**RECIPIENTS LIST**


|                                     | R... | Full Name       | Ema...      | Reci... |   |
|-------------------------------------|------|-----------------|-------------|---------|---|
| <input checked="" type="checkbox"/> | 1    | Jasmine Willows | Jasmine@... | SIGNER  | → |
|                                     | 2    | Casey Jones     | casey@ca... | SIGNER  |   |

**LINKEDIN SALES NAVIGATOR**

**SALES NAVIGATOR**

← Back

Potential matches [<](#) [>](#)

 **Jasmine Willows**  
Cat Header at Stretch Labor Camp  
San Francisco Bay Area

[Match](#)

[Help](#) [Privacy & Terms](#) [LinkedIn](#)

## Message Details

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

MESSAGE DETAILS

When employees send this agreement, the Agreement Name will be in the email subject, and the message will be sent in the body of the email to the recipients.

Agreement Name

GlobalCorp NDA

Message

Please review and complete this document.

- **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)
- **Regarding** – This locked value indicates the recipient imported based on the agreement template
- **Data Mapping** – This locked value indicates the Data Map that is associated with the template that configured this agreement

Reply

Reply All

Forward

IM

Casey M. Jones <echosign@echosign.com>

Please sign **This is the Agreement Name**

Adobe Sign

Send. Sign. Done.

Employment Eligibility Verification

ENCL Form I-9

U.S. Citizenship and Immigration Services

Section 1. Employee Information and Attestation (Employee must complete and sign Section 1 of Form I-9 no later than the first day of employment. An employer accepting a job offer)

Full Name (Print Name) \_\_\_\_\_ Day Name (Print Name) \_\_\_\_\_

Address (Street Number and Name) \_\_\_\_\_ Apt. Number \_\_\_\_\_ City or Town \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date of Birth (MM/DD/YYYY) \_\_\_\_\_ Social Security Number \_\_\_\_\_ Local Address \_\_\_\_\_ Telephone Number \_\_\_\_\_

Can you attest that federal law prohibits for employment and/or fines for false statements or use of false documents in connection with the completion of this form?

I attest, under penalty of perjury, that I am at least one of the following:

☐ A citizen of the United States

☐ A non-citizen national of the United States (See instructions)

☐ A lawful permanent resident (alien Registration Number (I-95) Number) \_\_\_\_\_

☐ An alien authorized to work and/or perform other duties. If applicable, enter date when "Not" to the form (See instructions)

For those authorized to work, provide your Alien Registration Number (I-95) Number (Alien Registration Number) \_\_\_\_\_

2. Alien Registration Number (I-95) Number \_\_\_\_\_

3. Date of Birth (MM/DD/YYYY) \_\_\_\_\_

4. Date of Birth (MM/DD/YYYY) \_\_\_\_\_

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99. Date of Birth (MM/DD/YYYY) \_\_\_\_\_

100. Date of Birth (MM/DD/YYYY) \_\_\_\_\_

Casey Jones Has Sent You

**This is the Agreement Name to Sign**

Casey M. Jones (Adobe Systems Inc) says:

**"This is the body of the Agreement Message"**

Click here to review and sign **This is the Agreement Name.**

After you sign **This is the Agreement Name**, 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.

13

## Add Files / Attachments

Documents can be added to the Agreement in one of two ways:

- **Upload file from your local system** – By clicking the plus icon in the Attachments section, you are prompted to browse your system for any file you would like to upload and attach to the agreement. This will work for networked drives (e.g. SharePoint)
- **Attach document or template from Adobe Sign Library** – By checking this box, you enable the list of document templates that have been uploaded to your Adobe Sign account. Single click the form you want to include, and then click the **Attach** button
- Only your administrator can add documents to the library

The screenshot displays the 'ATTACH FILES' interface. At the top, there's a header 'ATTACH FILES' with a plus icon. Below it, a table lists files. The first row shows '1 W-4.pdf'. The second row shows '2 NDA - 2018.docx' with a checkmark in the first column and a dashed box around the number '2'. A hand cursor is pointing at the number '2'. To the right of the table are icons for a folder and a refresh button. Below the table is a pagination bar with '<<' '<' 'Page 1' '>' '>>'.

Below the table is a section titled 'ATTACH FILE FROM ADOBE SIGN LIBRARY'. It contains a checkbox labeled 'Attach document or template from Adobe Sign Library' which is checked. Below the checkbox is a dropdown menu showing 'testlibrarydocument'. At the bottom right of this section is a blue button labeled 'Attach'.

**Note:**

All attached files are concatenated into one PDF for the signature process. The order the documents will appear is based on the order you list them in the Attachments section. If you need to reorder the documents, click into the *Order* field and manually update the document number. The application will automatically resort any other documents.

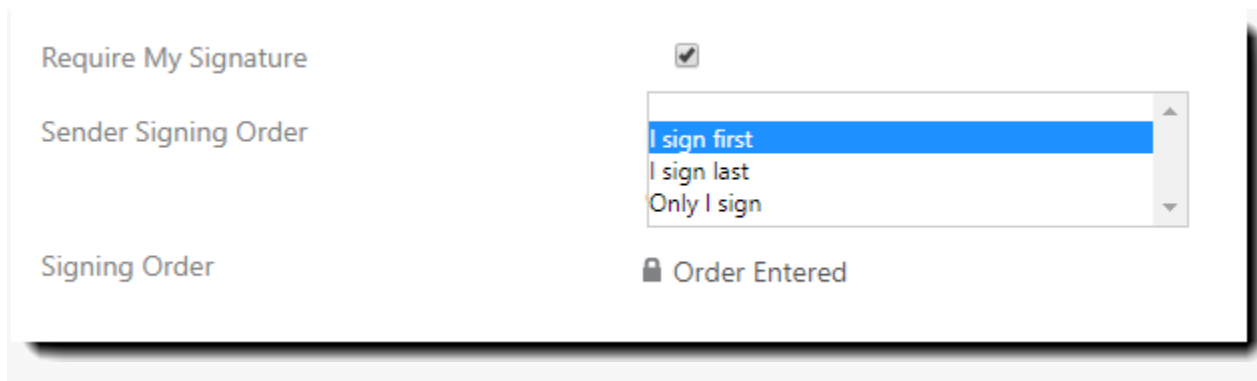
## The Agreement Options section

The Agreement Options section contains a number of configuration options that may apply only to this type of transaction:

| AGREEMENT OPTIONS                              |   |
|--|---|
| Preview and Position Signatures Before Sending | <input type="checkbox"/>  |
| Agreement Expires                              | <input checked="" type="checkbox"/>   |
| *Days Until Agreement Expires                  | 15  |
| Add Post-signing Landing Page                  | <input checked="" type="checkbox"/>   |
| *Post-signing Landing Page                     | <a href="https://landingpage.mycompany.domain">https://landingpage.mycompany.domain</a> |
| Require In-person Signing                      | <input type="checkbox"/>  |
| Require My Signature                           | <input type="checkbox"/>  |
| Signing Order                                  | <div>Any Order</div> <div>Order Entered</div>   |
| Signature Type                                 | ESIGN   |
| Schedule Recipient Reminders                   | <div>Never</div> <div>Every Day, Until Signed</div> <div>Every Week, Until Signed</div> |
| *Delay in seconds for redirect                 | 3   |
| Signing Language                               | English: US   |

- **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*



The screenshot shows a configuration panel for Adobe Sign. It includes three main sections: 'Require My Signature' with a checked checkbox, 'Sender Signing Order' with a dropdown menu showing 'I sign first' as the selected option, and 'Signing Order' with a dropdown menu showing 'Order Entered' as the selected option.

- **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



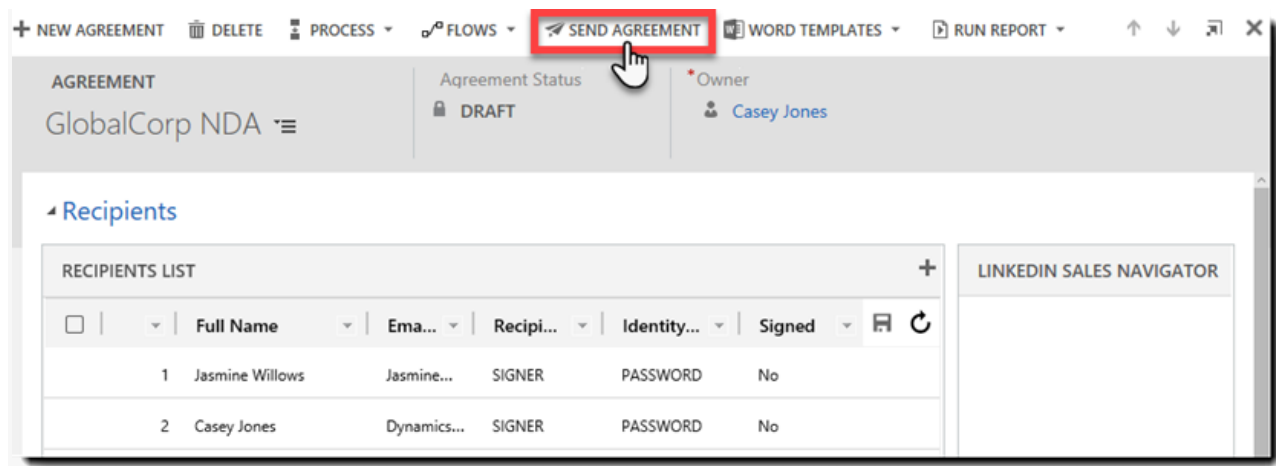
## Security Options

Adobe Sign natively applies a legal signature using the default email-based authentication process, but also allows for extended security in two forms:

- **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

The screenshot shows a 'SECURITY OPTIONS' dialog box. It has a title bar with the text 'SECURITY OPTIONS'. Below the title bar, there are two main sections. The first section is titled 'Set password to open signed PDF' and has a checked checkbox. Below this, there are two input fields: 'Enter Password:' and 'Confirm Password:'. The second section is titled 'Identity verification' and has a dropdown menu. The dropdown menu is open, showing four options: 'EMAIL', 'PASSWORD' (which is highlighted in blue), 'KNOWLEDGE BASE', and 'WEB IDENTITY'. Below the dropdown menu, there are two more input fields: 'Enter Password:' and 'Confirm Password:'. At the bottom right of the dialog box, there is a button labeled 'Save Password'.

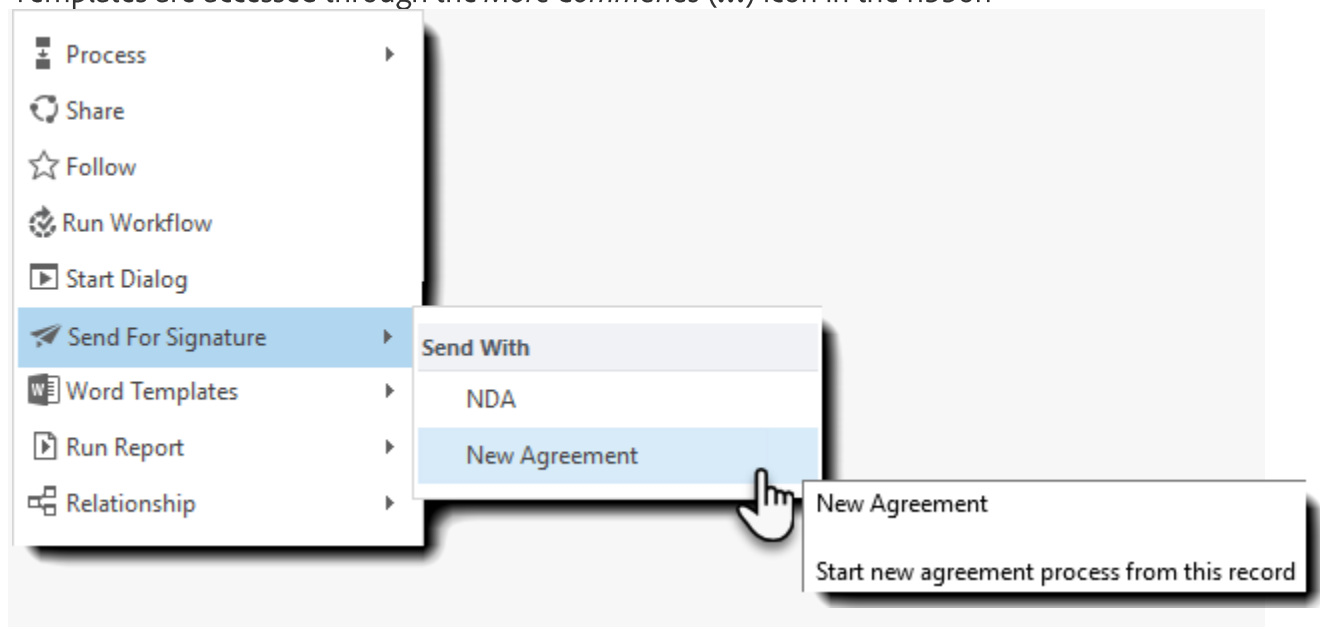
Once the recipients are defined, the files are attached, and any other field manipulation is completed, click **Send Agreement** from the top menu items



## Sending from any entity using a template

Dynamics administrators have the ability to create one or more templates for any Dynamics entity (Contact, Opportunity, Account) that will pre-configure the agreement, reducing the amount of manual configuration for the Sender.

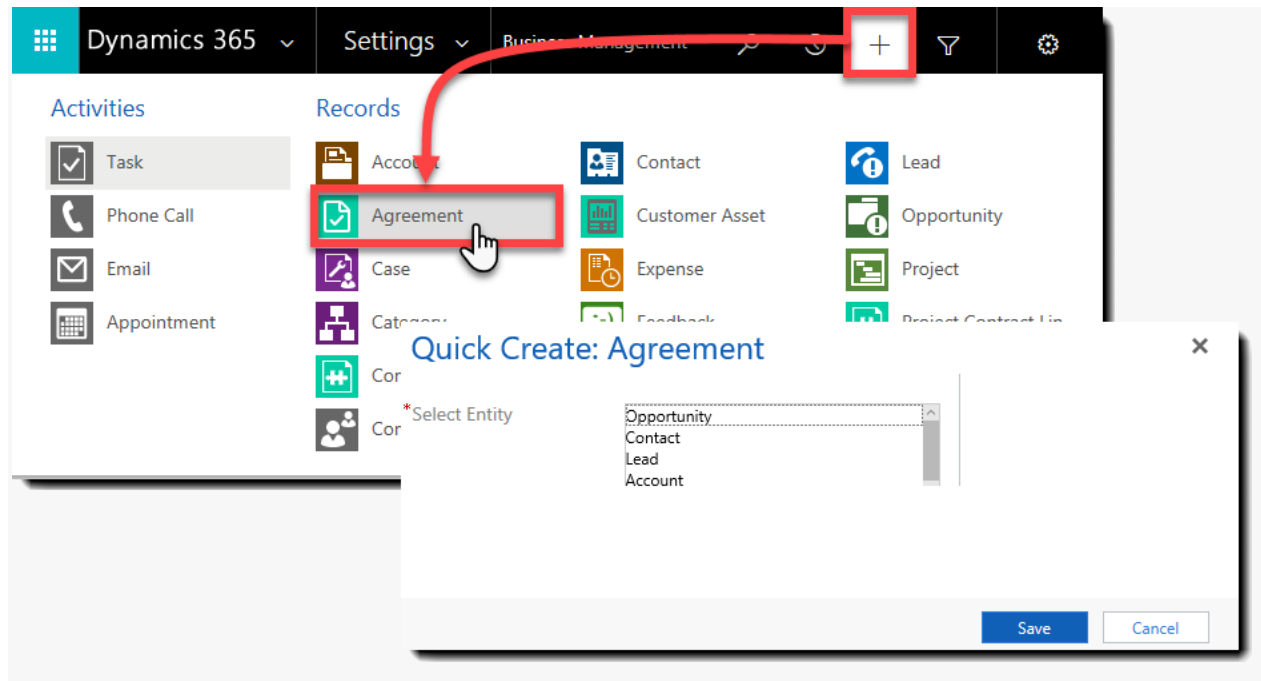
Templates are accessed through the *More Commands (...)* icon in the ribbon



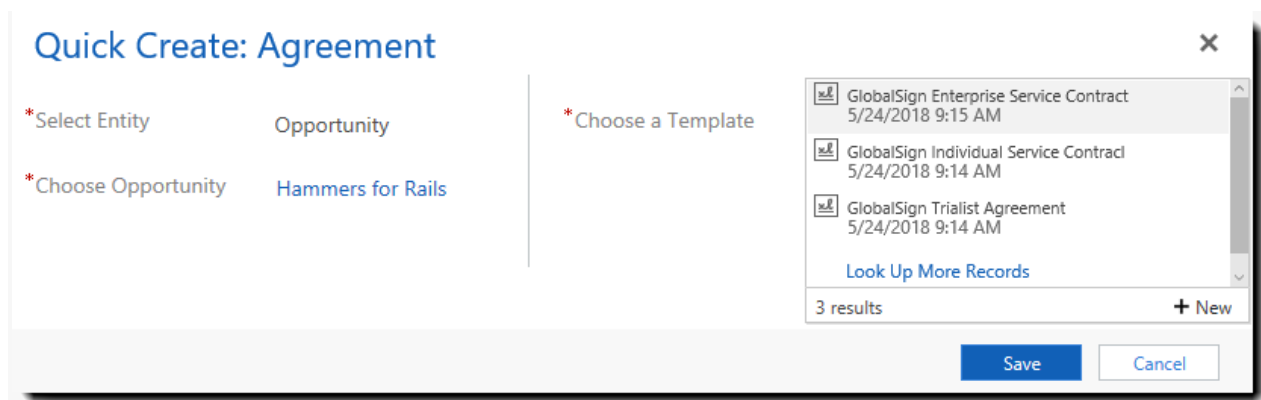
## Quick Create Agreements from the New (+) menu

If you know the Entity type that a template is built around, you can launch a new Agreement from the New menu:

- Click the New (+) icon in the top ribbon
- Select **Agreement** from the options in the *Records* section
- The *Quick Create: Agreement* panel opens



- Select the *Entity* that is associated with the template you want to use
- Once selected, two lookups are exposed, allowing you to select the template you want to use, and the specific object that you want to send the agreement to



- Clicking the *Choose a Template* field produces a small menu with the templates that are associated with the *Entity* you selected. Select the template
- Clicking in the Choose {Entity} field will give you a list of objects in the appropriate *Entity* type. Select your object
- Entering a portion of the entity name limits the menu to objects that match your string
- Click **Save**

After the *Save* button is clicked, the agreement is created based on the template values:

- If the template does not have a Recipient or File attached, the Agreement is created in a *Draft* status
- If the template has a Recipient and a File attached, but the template does **not** have *One-Click Send* enabled, the agreement is created in a *Draft* status
- If the template has a Recipient and a File attached, and *One-Click Send* **is** enabled on the template, the agreement is automatically sent for signature

**Note:**

The *Quick Create* system can only be used by standard entities within Dynamics.

- Opportunity
- Contact
- Lead
- Account
- Contract
- Invoice
- Order
- Quote
- User

Agreements sent from custom entities must start from the *Send for Signature* menu item.

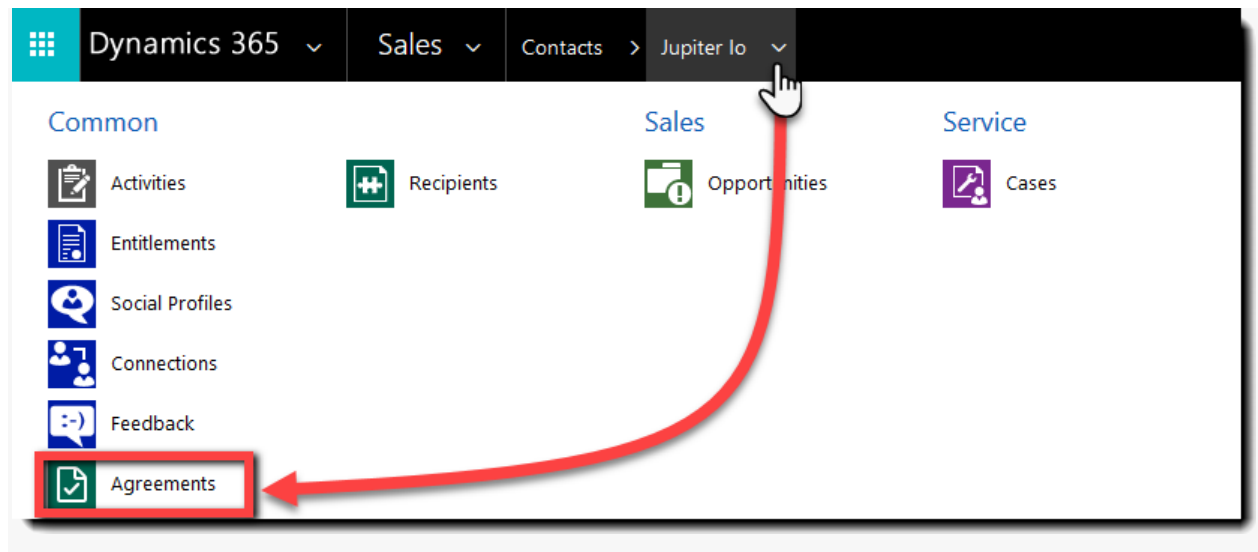
## Checking Agreement Status

The status of an agreement indicates its current legal status, and is updated in Dynamics on a regular polling interval. The status values are:

- **Draft** – An Agreement that has been created, but not yet sent
- **Out for Signature** – Actively in the process of being signed
- **Signed** – Fully signed by all parties and completed
- **Declined** – Indicates that one of the recipients declined the agreement, canceling it in the system.
- **Canceled** – The signature process was canceled by the sender before all signatures could be obtained

The best way to find an agreement is to check the entities related to the primary entity you used to create the agreement.

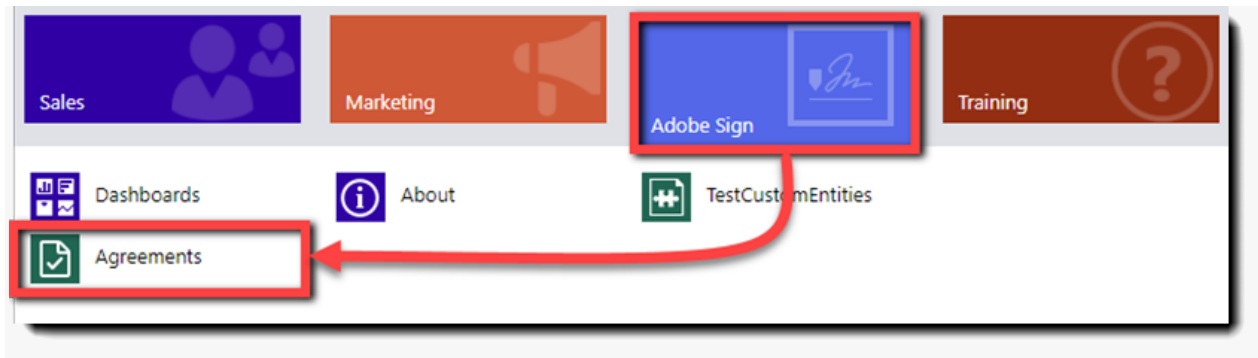
For example, if you created an agreement using a Contact, you can check what entities are related by navigation to the Contact, and then clicking the down arrow just to the right of that Contact's name:



Opening the relationship window shows the Agreements object, and clicking that option opens the full list of agreements associated with the entity.

Another way to view the status of an agreement is to review the full list of agreements:

- Navigate to **Adobe Sign > Agreements**



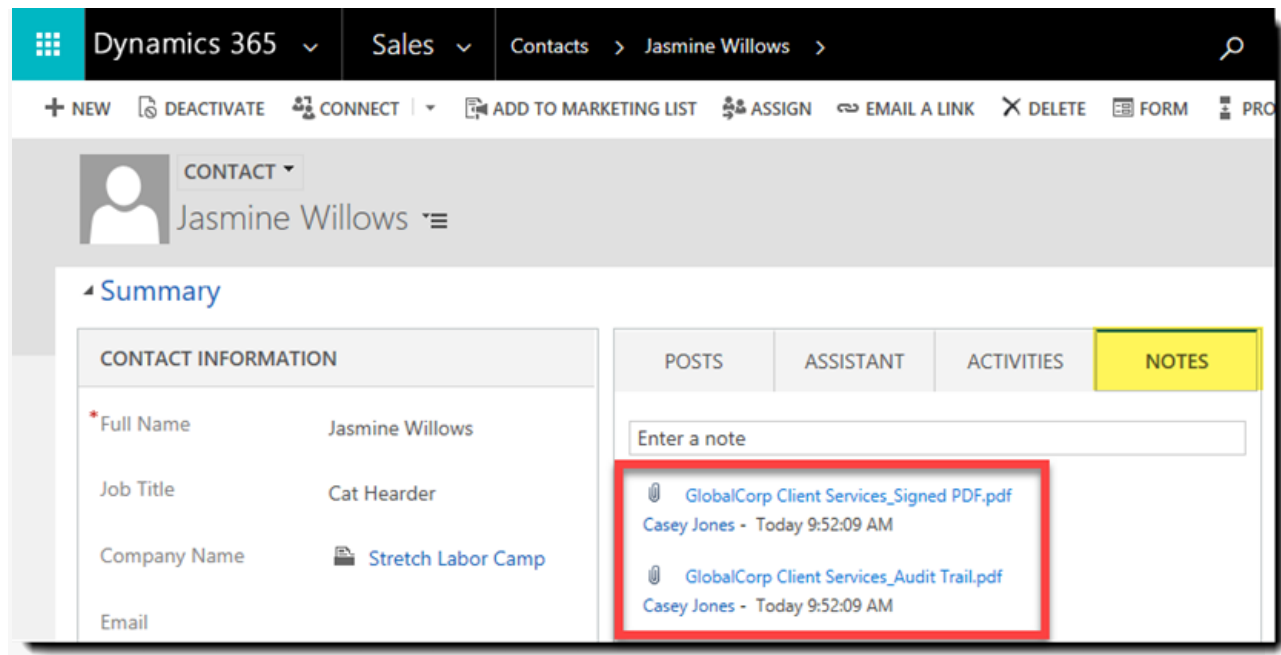
All agreements, regardless of entity, are listed in the agreements list on the Agreements page. For Signed agreements, the agreements lists display the *Name*, *Agreement Status*, and dates of the agreements. For Out for Signature and Draft agreements, only the applicable information displays.

A screenshot of the Adobe Sign Agreements page in Dynamics 365. The page shows a list of agreements with columns for Name, Agreement Status, Sent On, Signed On, and Owner. The table contains four rows of data. The top row is for 'GlobalCorp Client Services' with a status of 'SIGNED'. The second row is for 'GlobalCorp Services' with a status of 'OUT FOR SIGNATURE'. The third row is for 'GlobalCorp Services' with a status of 'SIGNED'. The fourth row is for 'GlobalCorp NDA' with a status of 'DECLINED'. The page also includes a search bar and a filter icon.

| <input type="checkbox"/> | Name                       | Agreement Status  | Sent On ↓        | Signed On        | Owner       |
|--------------------------|----------------------------|-------------------|------------------|------------------|-------------|
| <input type="checkbox"/> | GlobalCorp Client Services | SIGNED            | 5/9/2018 9:47 AM | 5/9/2018 9:50 AM | Casey Jones |
| <input type="checkbox"/> | GlobalCorp Services        | OUT FOR SIGNATURE | 5/7/2018 8:21 AM |                  | Casey Jones |
| <input type="checkbox"/> | GlobalCorp Services        | SIGNED            | 5/7/2018 8:19 AM | 5/7/2018 8:24 AM | Casey Jones |
| <input type="checkbox"/> | GlobalCorp NDA             | DECLINED          | 5/7/2018 8:17 AM |                  | Casey Jones |

**Note:**

Signed agreements can also be found in the *Notes* section of the Dynamics entity that they are related to.

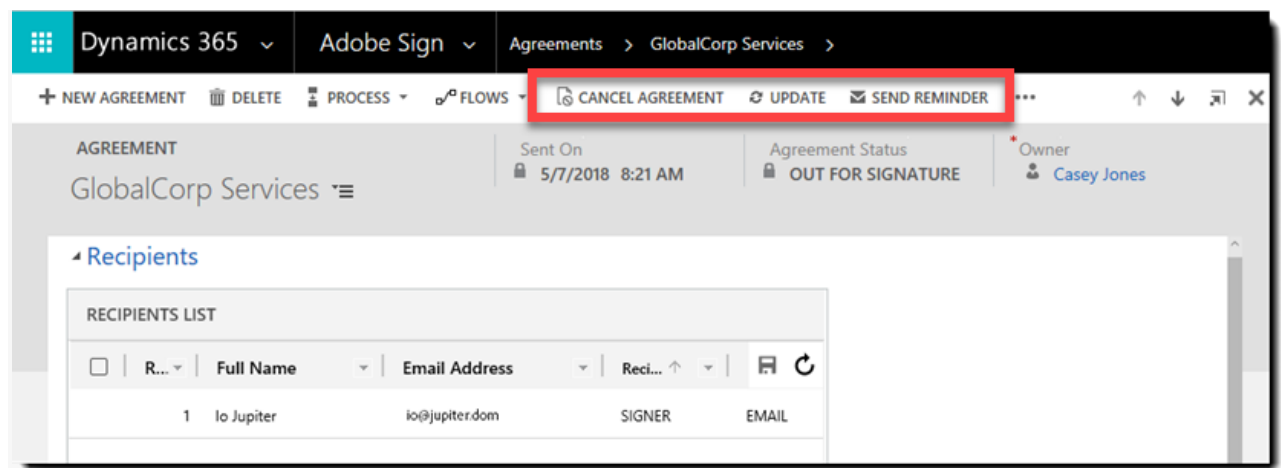


## Updating Status, Sending Reminders and Canceling Agreements

Unsigned Agreements have three actions that can be applied to them:

- **Update Status** – Actively poll the Adobe Sign server to get the current status
- **Send Reminder** – Immediately sends an email reminder to the current signer of the agreement
- **Cancel Agreement** – Terminates the agreement in the system and sends a cancellation notice to the signer

Each of these actions can be initiated from inside the agreement using the buttons along the top.



## Adobe Sign on 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.

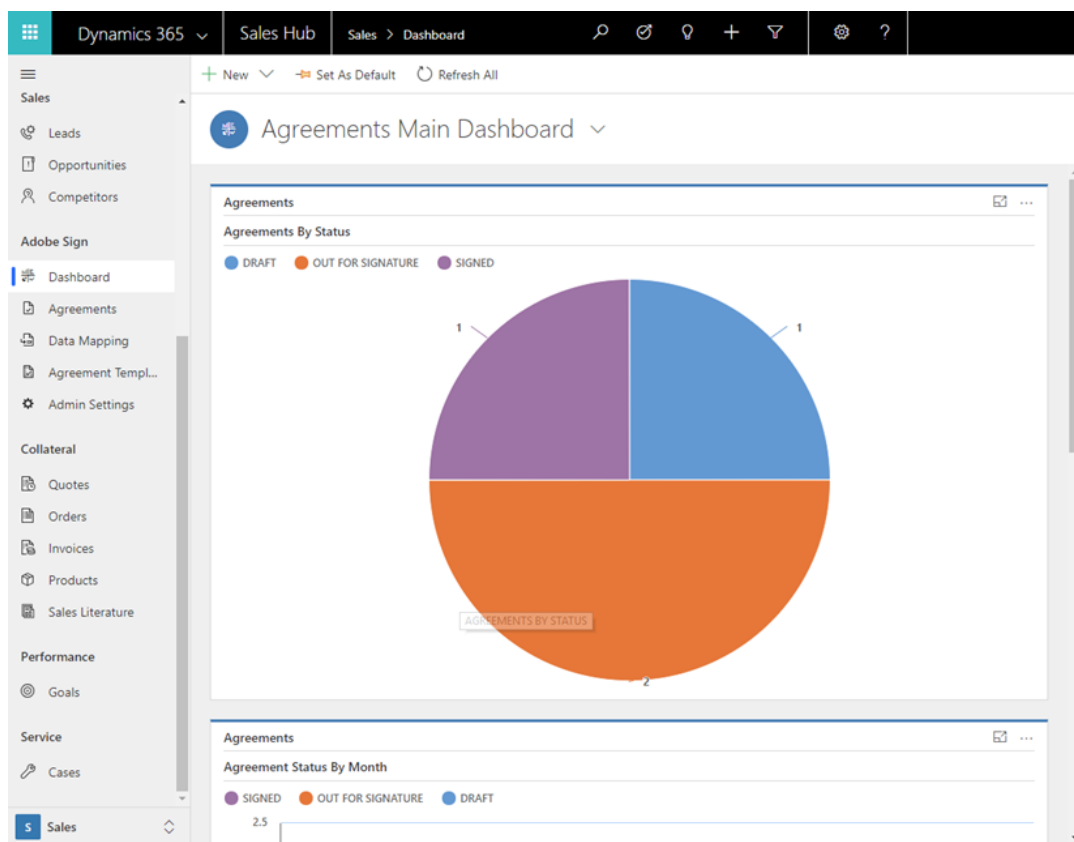
### Sales Hub: Dashboard

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.

| ✓ | Name          | Agreement Status  | Sent On           | Signed On         | Owner   | Created...    |
|---|---------------|-------------------|-------------------|-------------------|---------|---------------|
|   | New Agreement | DRAFT             | ---               | ---               | ○ Mohit | 2/15/2019 7:0 |
|   | New Agreement | OUT FOR SIGNATURE | 2/15/2019 6:54 PM | ---               | ○ Mohit | 2/15/2019 6:5 |
|   | New Agreement | OUT FOR SIGNATURE | 2/15/2019 7:20 PM | ---               | ○ Mohit | 2/15/2019 7:1 |
|   | New Agreement | SIGNED            | 2/16/2019 2:24 AM | 2/16/2019 2:25 AM | ○ Mohit | 2/16/2019 2:1 |

## Sales Hub: Data Mapping

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

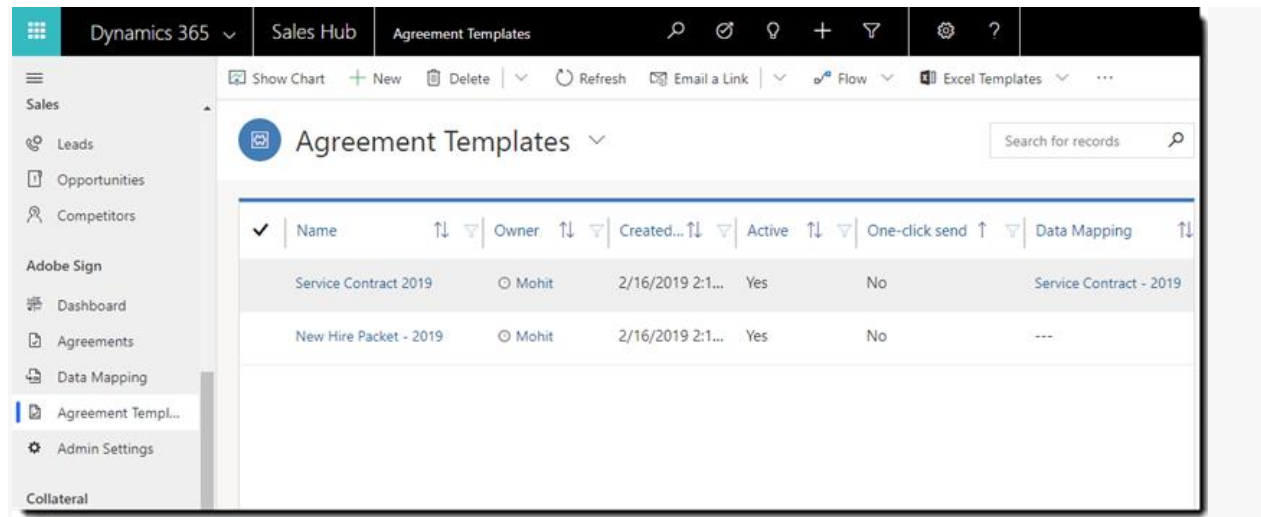
New Data Maps can also be created.

| ✓ | Name                     | Selected Entity | Created...       | Set as Default | Owner   |
|---|--------------------------|-----------------|------------------|----------------|---------|
|   | NDA                      | Contact         | 2/16/2019 2:1... | No             | ○ Mohit |
|   | New Client contract 2019 | Account         | 2/16/2019 2:1... | No             | ○ Mohit |
|   | Service Contract - 2019  | Opportunity     | 2/16/2019 2:1... | No             | ○ Mohit |

## 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.

