

## DocuSign for Dynamics 365 CRM – 6.1

**Published: May 30, 2018**

### Overview

This guide provides information on installing, signing, and sending documents for signature with DocuSign for Dynamics 365 CRM.

The primary audience for this guide is Microsoft Dynamics 365 CRM administrators. The installation and configuration tasks presented all require administrative rights. End users benefit from the topics [Send with DocuSign](#), [Sign Documents with DocuSign](#), and the general use [FAQ](#) items.

### Supported Versions

DocuSign for Dynamics 365 CRM supports the following versions and browsers:

- **Microsoft Dynamics 365 CRM - v8.1 and later:** Internet Explorer 11; Microsoft Edge; Chrome (latest version); Firefox (latest version)
- **DocuSign for Dynamics integration - v5.2 and v6.0**

**Note:** This connector does not support any Microsoft Dynamics 365 CRM on premises instances.

### Release Notes

For a synopsis of what's new or changed in DocuSign for Dynamics 365 CRM, see the Release Notes for each major version [here](#).



## **Early Access Notifications for Releases**

For major releases, customers can opt in to our Early Access list to receive notifications and pre-release versions before they are publicly available. To opt in, send an email request to [dyn@docusign.com](mailto:dyn@docusign.com) with the names and emails to receive Early Access notifications.

## Table of Contents

---

Install DocuSign for Dynamics 365 CRM .....	4
Install or Upgrade DocuSign for Dynamics 365 CRM .....	4
Uninstall DocuSign for Dynamics 365 CRM .....	7
Configure DocuSign for Dynamics 365 CRM .....	9
Create a DocuSign Configuration .....	9
Manage User Access to DocuSign .....	19
SharePoint Files Integration .....	24
Get Signatures using DocuSign Guided Flow .....	26
Sign Documents with DocuSign .....	35
Send with DocuSign Custom Menu .....	38
Track the Status of a Transaction .....	43
Customize DocuSign for Dynamics .....	45
DocuSign Custom Activities .....	45
Add custom activities to process steps .....	47
Create Custom Buttons .....	55
AutoPlace text .....	60
Set up merge fields .....	62
Set up merge field write backs .....	65
FAQ .....	67
For More Information or Assistance .....	70

## Install DocuSign for Dynamics 365 CRM

DocuSign for Dynamics 365 CRM is a separately purchased integrated solution that includes DocuSign for Dynamics 365 CRM and DocuSign for Dynamics Workflows.

This topic includes information on the following:

- Installing or upgrading the DocuSign application
- Uninstalling the DocuSign application

**Important!** You must be a Microsoft Dynamics 365 CRM administrator to install the DocuSign application.

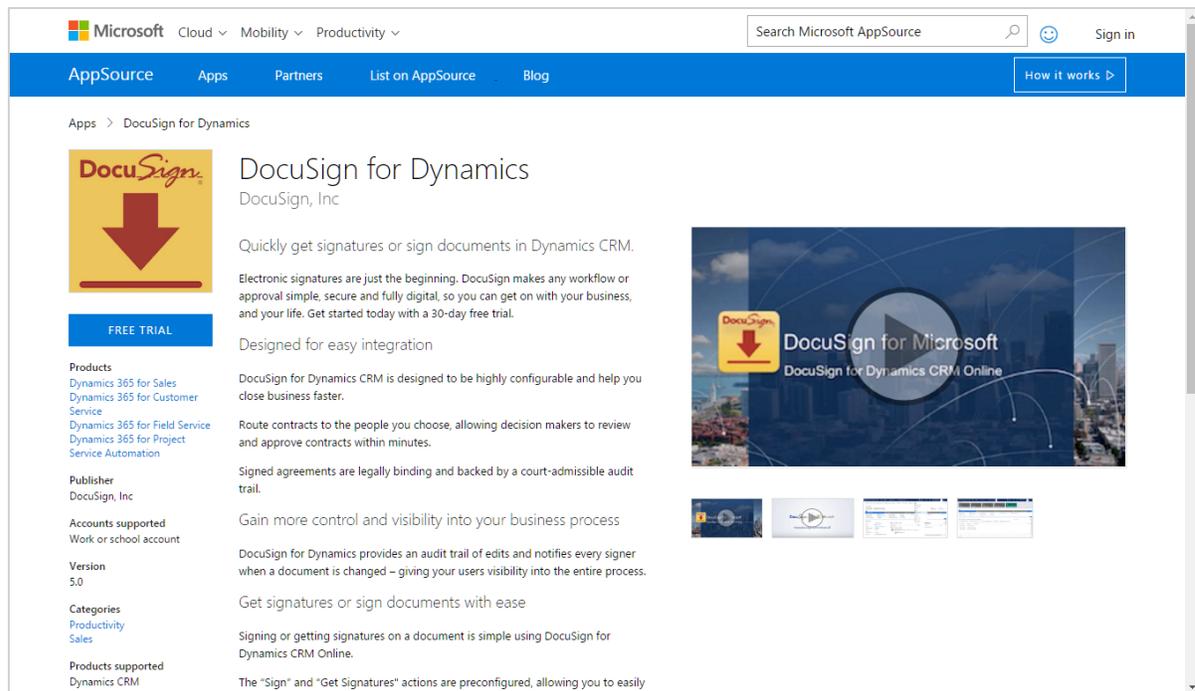
### Install or Upgrade DocuSign for Dynamics 365 CRM

Follow these steps to install the application or upgrade from an older installed version:

**Note:** When upgrading to a new version of the solution, all DocuSign status data and the system-wide login credentials are retained in Dynamics 365 CRM.

1. (Optional) If you are upgrading, as a best practice, we recommend that you export your Microsoft Dynamics 365 CRM customizations. After you complete the upgrade, if necessary, you can re-import your customizations.

2. Follow this [link](#) to go to Microsoft AppSource.



The screenshot shows the Microsoft AppSource page for DocuSign for Dynamics CRM. The page features a blue header with the Microsoft logo and navigation links for Cloud, Mobility, and Productivity. A search bar and a 'Sign in' button are also present. The main content area is titled 'DocuSign for Dynamics' and includes a 'FREE TRIAL' button. The page lists supported products, publisher information, and accounts supported. A large image on the right shows the DocuSign for Microsoft logo and a cityscape background.

3. On the left, click **Free Trial**.
4. Using your work account, sign in to your Microsoft AppSource account, or sign up for an account if you don't already have one.
5. Read and accept the terms of use, and then click **CONTINUE**.
6. On the next screen scroll down and select the organization to which you want to add DocuSign for Dynamics 365 CRM.
7. Select the two check boxes to accept legal terms and privacy statements.

### Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to: ds (org [REDACTED])

Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

8. Click **ACCEPT**.

This starts the installation process, which may take a few minutes.

Microsoft Dynamics 365

### Dynamics 365 Administration Center

[INSTANCES](#) | [UPDATES](#) | [SERVICE HEALTH](#) | [BACKUP & RESTORE](#) | [APPLICATIONS](#)

**Manage your solutions**

Select a preferred solution to manage on selected instance: DSDemo

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Community Portal	8.2.0.260	1/1/2050	Not installed
Company News Timeline	1.0.0.0	12/31/2050	Not installed
Custom portal	8.2.0.260	1/1/2050	Not installed
Customer Self-Service Portal	8.2.0.260	1/1/2050	Not installed
DocuSign for Dynamics CRM Online	4.3.0.0	1/1/2021	Installation pending
Dynamics 365 Customer Service Applica...	1.0	1/1/2050	Installed
Dynamics 365 Sales Application	1.0	1/1/2050	Installed
Employee Self-Service Portal	8.2.0.260	1/1/2050	Not installed

**DocuSign for Dynam...**

Please wait while installation starts. This may take a few minutes.

Allows documents stored as notes on entities to be sent for signatures via DocuSign.

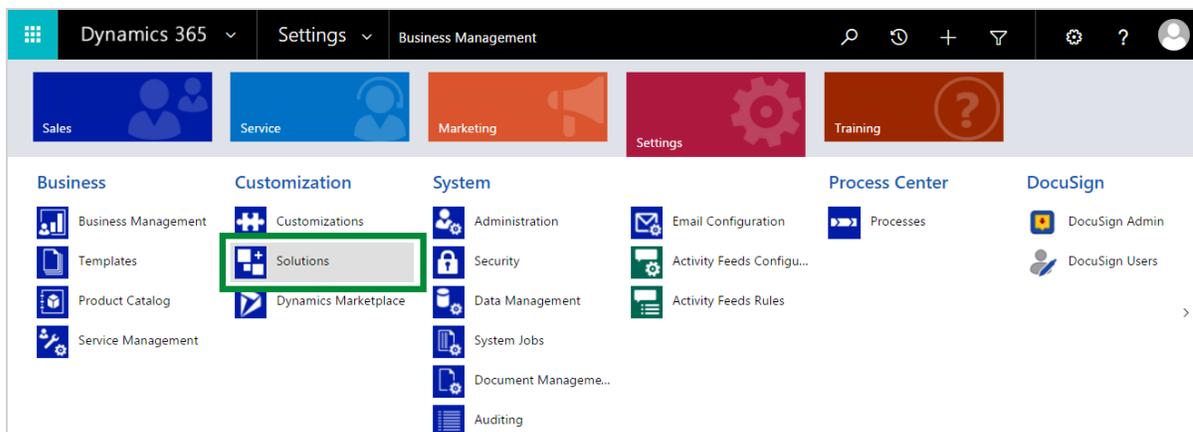
Created by: DocuSign, Inc.

[Learn more](#)

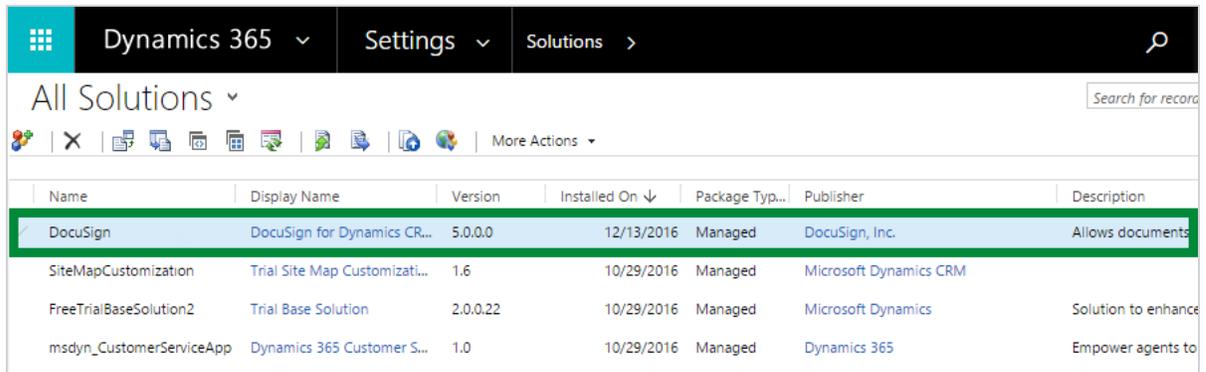
## Uninstall DocuSign for Dynamics 365 CRM

Uninstalling the DocuSign application deletes the DocuSign for Dynamics 365 CRM solution from your Dynamics 365 CRM instance, as well as all DocuSign-related status data.

1. Before uninstalling the application, as an administrator, you must remove all dependencies to DocuSign from the Microsoft Dynamics 365 CRM instance:
  - a. Remove any steps that reference DocuSign-related fields from any custom business process associated with the following entities: Accounts, Contacts, Leads, and Opportunities.
  - b. Remove the DocuSign user role for all users.
2. To uninstall DocuSign for Dynamics 365 CRM, in the top navigation bar, click **Settings**, and then click **Solutions**.

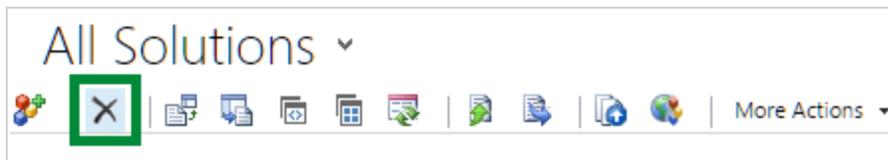


3. Select the DocuSign solution, and then, on the Action toolbar, click **Delete**.



The screenshot shows the Dynamics 365 interface with the 'Solutions' menu open. The 'All Solutions' list is displayed, with the 'DocuSign' solution highlighted in green. The table below shows the details of the solutions.

Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
DocuSign	DocuSign for Dynamics CR...	5.0.0.0	12/13/2016	Managed	DocuSign, Inc.	Allows documents
SiteMapCustomization	Trial Site Map Customizati...	1.6	10/29/2016	Managed	Microsoft Dynamics CRM	
FreeTrialBaseSolution2	Trial Base Solution	2.0.0.22	10/29/2016	Managed	Microsoft Dynamics	Solution to enhance
msdyn_CustomerServiceApp	Dynamics 365 Customer S...	1.0	10/29/2016	Managed	Dynamics 365	Empower agents to



The DocuSign solution is uninstalled from your Dynamics 365 CRM instance, along with all DocuSign-related status data.

## Configure DocuSign for Dynamics 365 CRM

After you install the DocuSign for Dynamics 365 CRM application, there are a few basic configuration tasks necessary to set up the solution and enable your Dynamics 365 CRM users to sign or get signatures using DocuSign.

This topic presents the following configuration tasks:

- [Create a DocuSign Configuration](#)
- [Manage user access to DocuSign](#)

You must be a Microsoft Dynamics 365 CRM administrator to perform the tasks in this topic.

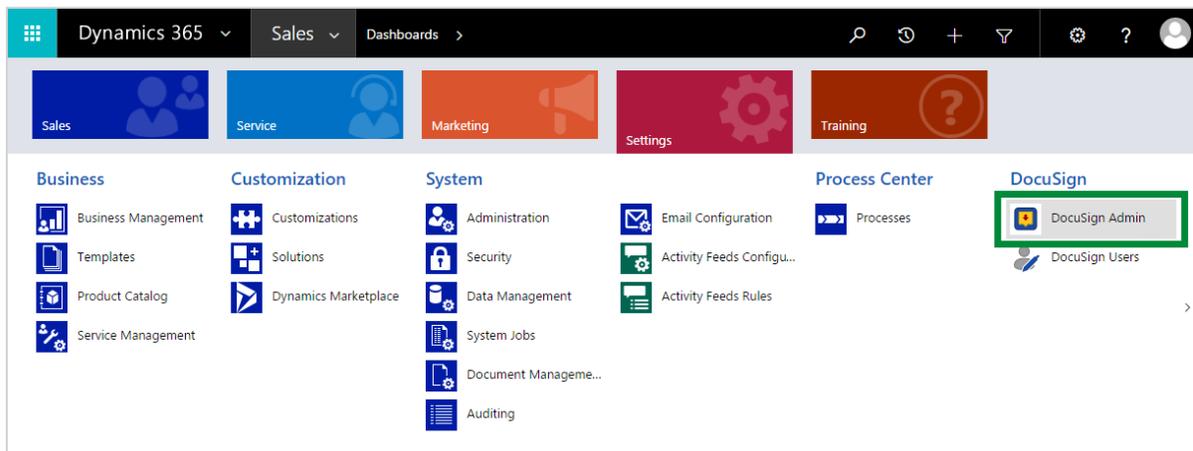
### Create a DocuSign Configuration

To complete the basic setup of DocuSign for Dynamics 365 CRM, you must create a DocuSign Configuration to register your DocuSign account credentials, set your DocuSign environment, and allow DocuSign access to your Dynamics data. You can use an existing DocuSign account or create a free trial.

After you create the DocuSign Configuration, you can adjust the account settings and enable DocuSign actions on your organization's Dynamics 365 CRM entities.

#### To create an account configuration

1. From the Main menu, click **Settings**.
2. In Settings, under the DocuSign menu option, click **DocuSign Admin**:

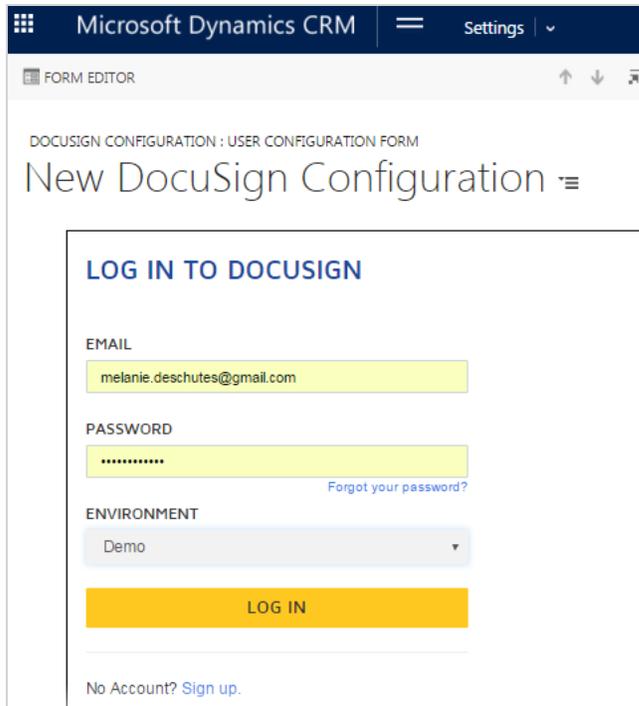


3. Follow the on-screen instructions to enter your credentials. Best practice tip: use an integration admin user - a user with DocuSign admin permissions that is a service account just for the integration and that won't change over time.

**Note:** If you have a DocuSign account, you must enable the **Account-Wide Rights** and **Send On Behalf Of Rights (API)** features for your account.

- Use the **Environment** drop down to select the appropriate DocuSign environment for the account you are logging into.
- If you have multiple DocuSign accounts for the credentials you provide, you must

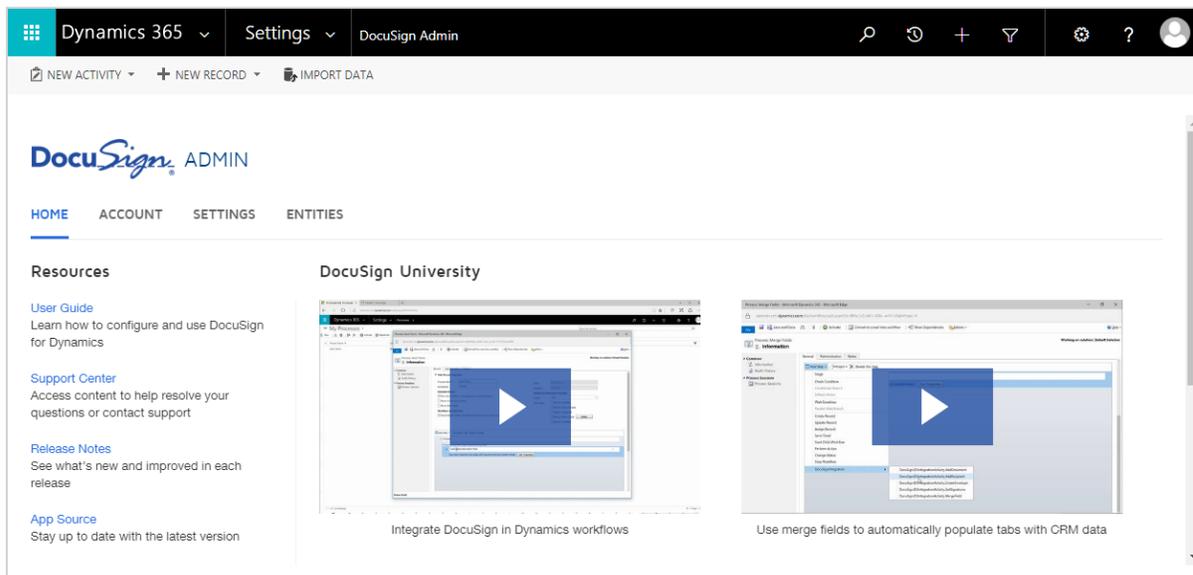
select the account to use in the **Select an Account** window.



The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with the Microsoft Dynamics CRM logo and a 'Settings' dropdown menu. Below this, the 'FORM EDITOR' tab is active. The main content area displays the 'DOCUSIGN CONFIGURATION : USER CONFIGURATION FORM' and the title 'New DocuSign Configuration'. The form itself is titled 'LOG IN TO DOCUSIGN' and includes the following fields and elements:

- EMAIL:** A text input field containing 'melanie.deschutes@gmail.com'.
- PASSWORD:** A text input field with masked characters (dots). A 'Forgot your password?' link is located below the field.
- ENVIRONMENT:** A dropdown menu currently set to 'Demo'.
- LOG IN:** A prominent orange button.
- Footer:** A link that says 'No Account? Sign up.'

4. In the Authorize DocuSign for Dynamics window, click **Connect** to allow the DocuSign solution to access your Dynamics 365 CRM data. This setting is required to enable all DocuSign functionality in your Dynamics organization.
5. After you have successfully logged in to DocuSign or created a new account, the DocuSign Admin Home screen appears. Click **ACCOUNT** to see your account information.



## To adjust your account settings

1. From the DocuSign Admin screen, click **SETTINGS**, and then adjust any of the following options.

Dynamics 365 Settings DocuSign Admin

NEW ACTIVITY NEW RECORD IMPORT DATA

## DocuSign ADMIN

HOME ACCOUNT **SETTINGS** ENTITIES

### Document Settings

Include a Certificate of Completion with signed documents

Save completed documents to SharePoint DISABLE

Signed document naming convention DocuSign document subject + "\_signed"

### Email Settings

Default Email Subject Please review and sign your document

Default Email Message Someone has sent you a new DocuSign document to view and sign. Please click on the 'View Documents' link below to begin signing. Thank you.

**SAVE**

2. Under Document Settings, next to Include a Certificate of Completion with signed documents, clear the check box if you do not want all signed documents to include a Certificate of Completion (CoC). The default is for all signed documents to include a CoC.

### Document Settings

**Include a Certificate of Completion with signed documents**

3. Next to Save completed documents to SharePoint, enable (or disable) the server-to-server integration between Dynamics and SharePoint. See [SharePoint Integration](#) for more information.

<b>Save completed documents to SharePoint</b>	<b>DISABLE</b>
---	----------------

- Next to Signed document signing convention, select whether to include the timestamp in the signed document file name. The timestamp represents when the Dynamics 365 CRM system receives the document from the DocuSign system.

<b>Signed document naming convention</b>	DocuSign document subject + "_signed"
	DocuSign document subject + "_signed"
	<b>DocuSign document subject + "_signed" + timestamp</b>
<b>Email Settings</b>	

- Under Email Settings, modify the default email subject and message that is sent to all recipients when sending a document for signature.

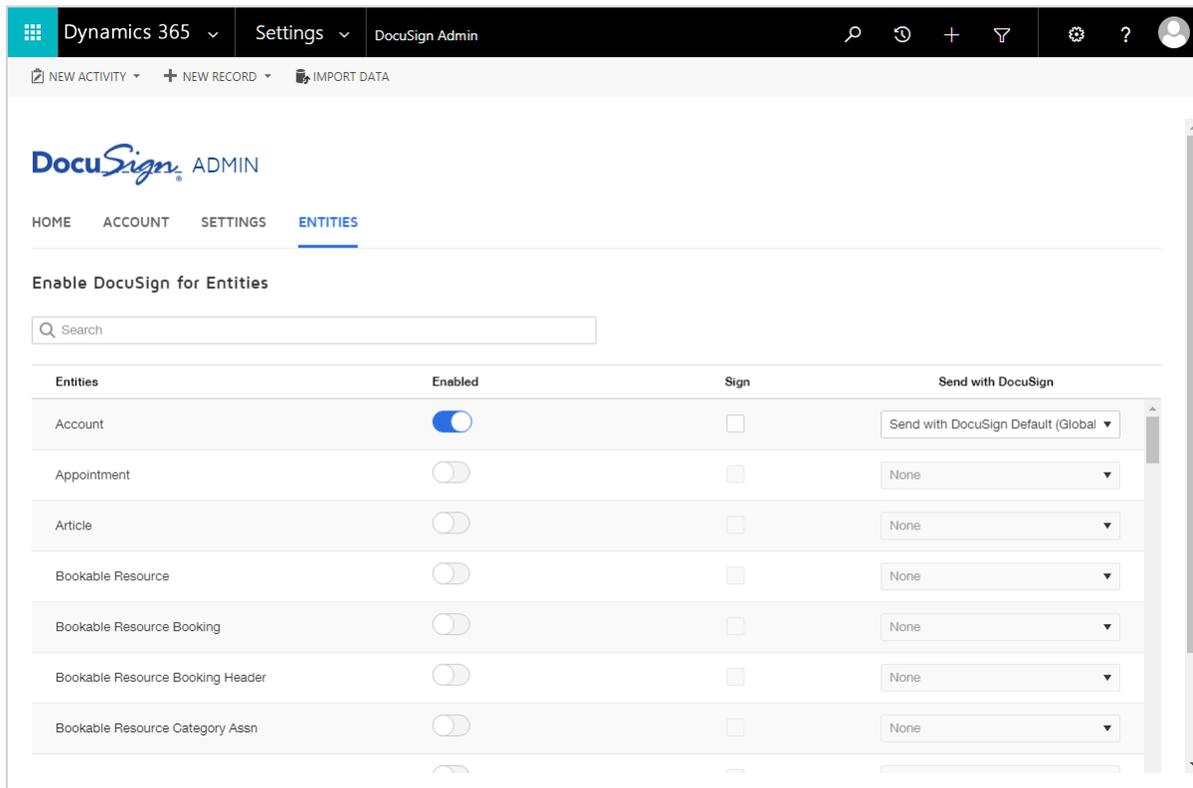
<b>Email Settings</b>	
<b>Default Email Subject</b>	Please Review and sign your document
<b>Default Email Message</b>	Someone has sent you a new DocuSign document to view and sign. Please click on the 'View Documents' link below to begin signing. Thank you.

- On the bottom left, click **SAVE** to save your Settings changes.

## To enable Sign and Send with DocuSign actions for Entities

- Click **ENTITIES**, turn on the **Enable** switch, and then select the DocuSign **Sign** and **Send with DocuSign** actions for the entities in your CRM environment. By default, Send with DocuSign is enabled for the Account, Opportunity, Contact, Lead, and

Quote entities. The actions display in the ribbon bar of entities for which they are enabled. You can hover over the entity name to see the fully qualified name of the entity, including the namespace.



Entities	Enabled	Sign	Send with DocuSign
Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Send with DocuSign Default (Global)
Appointment	<input type="checkbox"/>	<input type="checkbox"/>	None
Article	<input type="checkbox"/>	<input type="checkbox"/>	None
Bookable Resource	<input type="checkbox"/>	<input type="checkbox"/>	None
Bookable Resource Booking	<input type="checkbox"/>	<input type="checkbox"/>	None
Bookable Resource Booking Header	<input type="checkbox"/>	<input type="checkbox"/>	None
Bookable Resource Category Assn	<input type="checkbox"/>	<input type="checkbox"/>	None

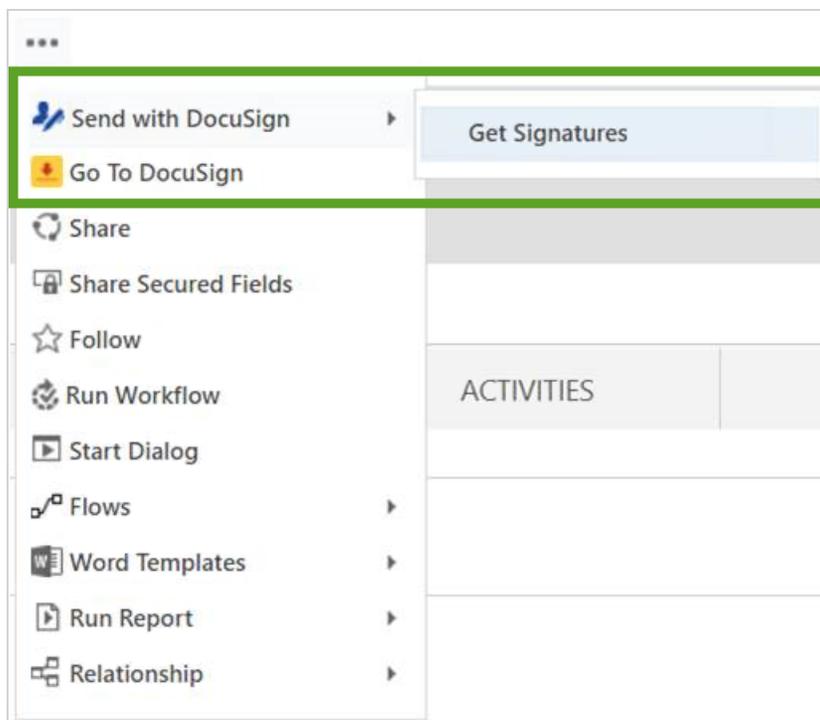
- **To enable the entity for DocuSign** – turn on the **Enable** switch next to the entity name. This is required to use any DocuSign actions, including custom buttons and workflows.
- **To enable the DocuSign Sign action** - select the **Sign** check box next to the entity name.
- To enable the Send with DocuSign custom button - select the action for the Send with DocuSign button. See [Create Custom Buttons](#).
- **To enable the DocuSign Get Signatures action** - select the **Get Signatures** check

box next to the entity name.

**Note:** Starting with version 6.0, new customers will not see, and cannot enable this action. Existing customers can see it, however.

- **To disable the DocuSign action from an entity** - turn off the **Enable** switch next to the entity name. This clears the **Sign** and **Send with DocuSign** check boxes, but does not remove any of the DocuSign transactions associated with the entity.

When a DocuSign action is enabled for an entity, the action appears in the command bar for that entity:



2. On the bottom left, click **SAVE** to save your Entities changes.

**To manually update statuses**

Normally, updates to the status of envelopes sent through DocuSign for Dynamics are automatically posted to Dynamics when a change occurs. There might be times when an update is missed or fails because of connection issues or other problems. As a backup to the normal post-function, DocuSign has implemented the Update Statuses button to let you initiate a check of the envelope statuses in the DocuSign system and update the statuses as needed.

The screenshot displays the DocuSign Admin interface within the Dynamics 365 environment. The top navigation bar includes 'Dynamics 365', 'Settings', and 'DocuSign Admin'. Below this, there are options for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. The main content area is titled 'DocuSign Admin' and features a navigation menu with 'HOME', 'ACCOUNT', 'SETTINGS', and 'ENTITIES'. The 'ACCOUNT' section is active, showing 'DocuSign Account Information' with the following details:

<b>Account Name</b> Max	<b>Account ID</b> 1778812
<b>System User</b> max@demods.onmicrosoft.com	<b>Environment</b> Demo

Below the account information, there is a section for 'Connect DocuSign to Dynamics' with a 'User' field set to 'max@demods.onmicrosoft.com'. At the bottom, three buttons are visible: 'MODIFY ACCOUNT CONFIGURATION' (blue), 'GO TO DOCUSIGN' (grey), and 'UPDATE STATUSES' (grey, highlighted with a green border).

When you click **Update Statuses**, it finds all the DocuSign Envelope Status records that are not at an end-state status (Completed, Declined, or Voided). It then checks the status of those records with the DocuSign system and updates the envelope status in Dynamics. If the envelope status changed to Completed, in addition to changing the status, the completed envelope documents are posted to the record.

## Manage User Access to DocuSign

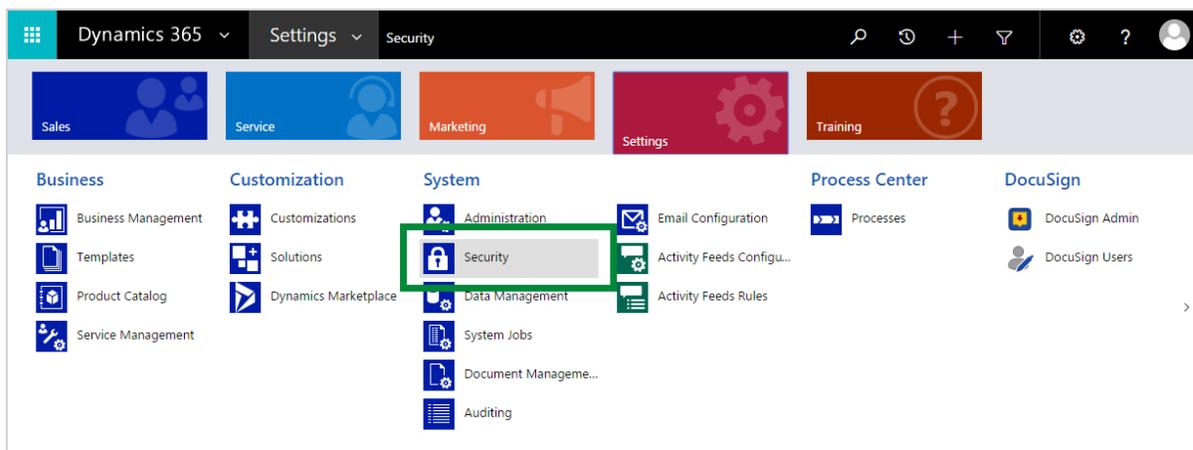
For your Dynamics organization users to be able to see and use the DocuSign solution, they must meet the following two qualifications:

- The DocuSignUser role must be assigned to the user
- The user must be a member of the DocuSign account used in the DocuSign Admin

### To assign the DocuSignUser role

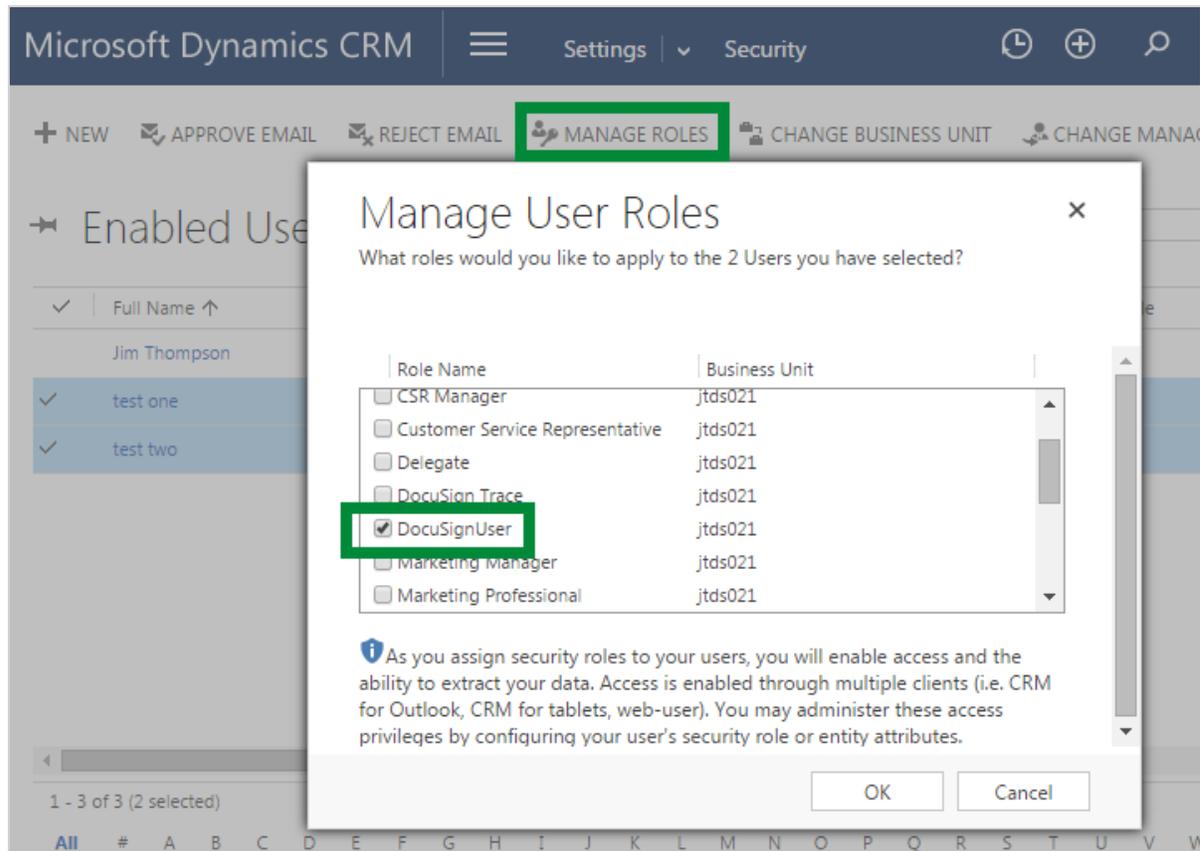
For a non-administrative user of Dynamics 365 CRM to have access to DocuSign solution, as the Dynamics 365 CRM administrator, you must edit the user's record to assign the DocuSignUser role.

1. Log in as a Dynamics 365 CRM administrator.
2. Navigate to the **Settings > Security** view.



3. Click **Users**.

4. Locate the user record for the person to which you want to grant access, and select it. You can select multiple records at once.
5. Click **Manage Roles**, and then select the **DocuSignUser** role.



**Note:** You may notice a DocuSign Trace role. This is a system role, used for debugging purposes only; do not assign users to this role.

6. Click **OK**.

The user is assigned the role and has access to DocuSign for Dynamics 365 CRM.

## User access basics

To use DocuSign to sign or get signatures, Dynamics users must be members of the DocuSign account specified in the DocuSign Admin. As long as Dynamics users are members in the DocuSign account, using the same email address as in the Dynamics organization, they will be able to seamlessly access the DocuSign functionality. If they use a different email address, or if they are not members in the DocuSign account, then as the DocuSign administrator, you'll need to provide assistance.

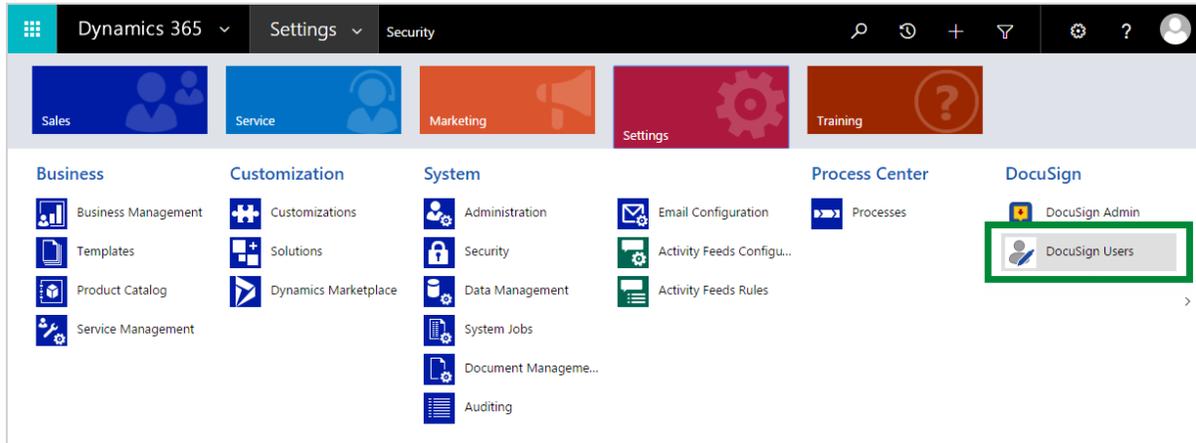
When a Dynamics 365 CRM user executes any DocuSign action, the system checks to see whether that user exists in DocuSign, using the Dynamics user's email address. There are two possible results of the account check:

- If the user is a member in the DocuSign account specified in the DocuSign Admin, they are added to the DocuSign Users table and they can proceed to use the solution.
- If the user is not a member in the DocuSign account, a message instructs the user to contact the solution administrator for assistance. In this case, to provision the user, a DocuSign administrator for the account must add the user manually, as described in [this Help guide](#).

## To edit the DocuSign Users table

As the Dynamics 365 CRM administrator, you can edit the DocuSign Users table to correct or add entries. For example, if a Dynamics user has a different email address for the DocuSign membership, you can add them to the table manually.

1. Log in as a Dynamics 365 CRM administrator.
2. Navigate to the **Settings > DocuSign Users** view.



3. To edit an existing record,
  - a. Locate and select the user record, and then click **Edit**.
  - b. Update the DocuSign Email field to match the address used in the DocuSign account.
  - c. Click **SAVE**.
4. To add a record,
  - a. Click **NEW**.
  - b. In the System User field, enter or search for and select the user's name.
  - c. In the DocuSign Email field, type the user's DocuSign email address.
  - d. Click **SAVE**.

The next time the user attempts to use the DocuSign solution, the system checks to see whether the user is a member of the DocuSign account, under the email address entered in the DocuSign Users record. If you entered the correct email

address, the user will be able to use the solution, and the record in the table will be updated with the remaining DocuSign information.

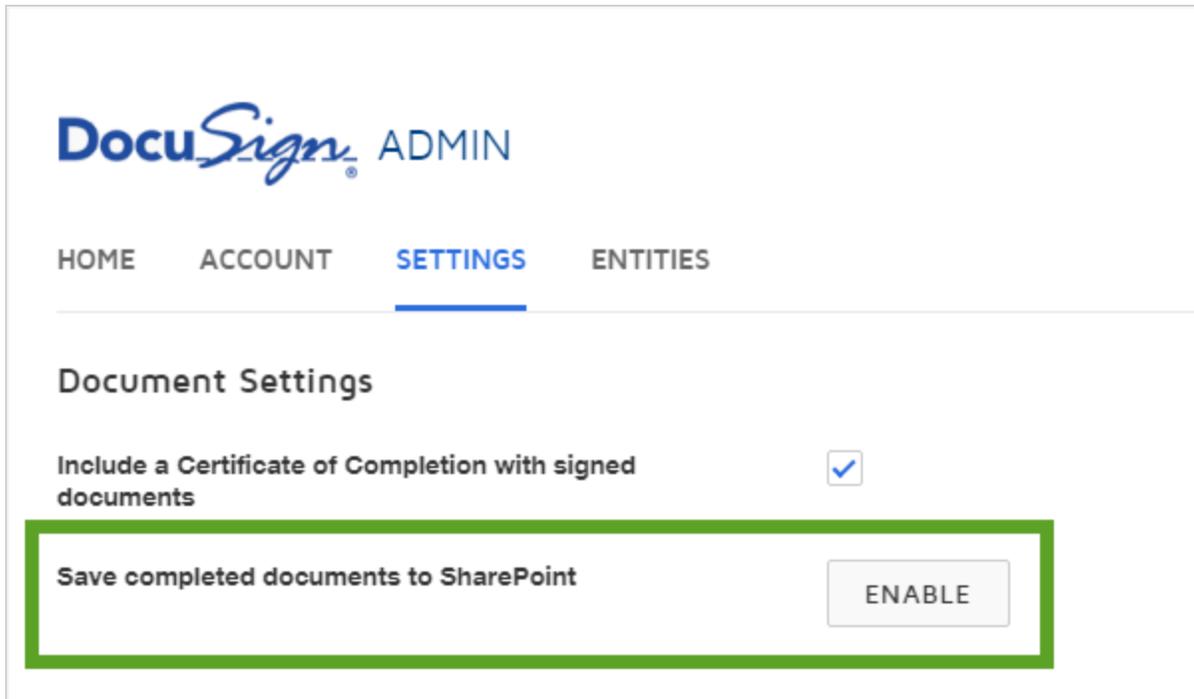
## SharePoint Files Integration

If you use SharePoint Online and want to access documents in SharePoint from Dynamics, you can do so after you enable SharePoint document management in Dynamics. When enabled, you can send a document saved in SharePoint. Completed documents are saved back to SharePoint. The DocuSign SharePoint integration uses the default SharePoint site that is configured in Document Management. In addition, SharePoint files are automatically organized by folder and linked to the related Dynamics opportunity, account, etc.

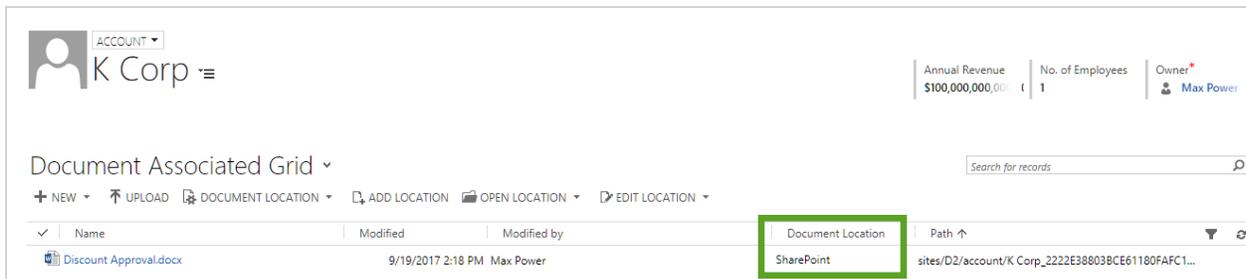
Requirements to access SharePoint documents from Dynamics:

- Only available with SharePoint Online sites in the same tenant as Dynamics
- Must use the Send with DocuSign button (does not work with Sign or Get Signatures)
- Configure document management in Dynamics with server-based authentication (see [this Microsoft TechNet article](#))

Enable this feature from the Dynamics **DocuSign Admin > Settings** page. You will be prompted to allow DocuSign for Dynamics to access your SharePoint sites.



The following image shows SharePoint documents within Dynamics.



## Get Signatures using DocuSign Guided Flow

**Important:** Starting with version 6.0, new customers will not have access to the Get Signatures guided flow. Instead, the Send with DocuSign custom button will be enabled. See [Send with DocuSign](#) for how to use the Send with DocuSign button.

Existing customers can still use the Get Signatures guided flow, but, starting with version 6.1, all customers will be migrated to the Send with DocuSign custom button flow. The custom button flow provides the same functionality and should not require changes to customers' workflows.

The **Get Signatures** or **Sign** action is added to the command bar for all the entities that have been enabled with DocuSign by your Microsoft Dynamics administrator.

For **Get Signatures**, by default, recipients are added to the transaction based on the entity type as follows:

- **Opportunity** - the Contact is added
- **Account** - the Primary Contact is added
- **Contact** - the Contact is added
- **Lead** - the Lead is added
- **Quote** - the Primary Contact on the Potential Customer account is added

If you have saved templates in your DocuSign account, the documents you select to use are compared to those in the templates. If the documents are similar enough, you can apply the matching template.

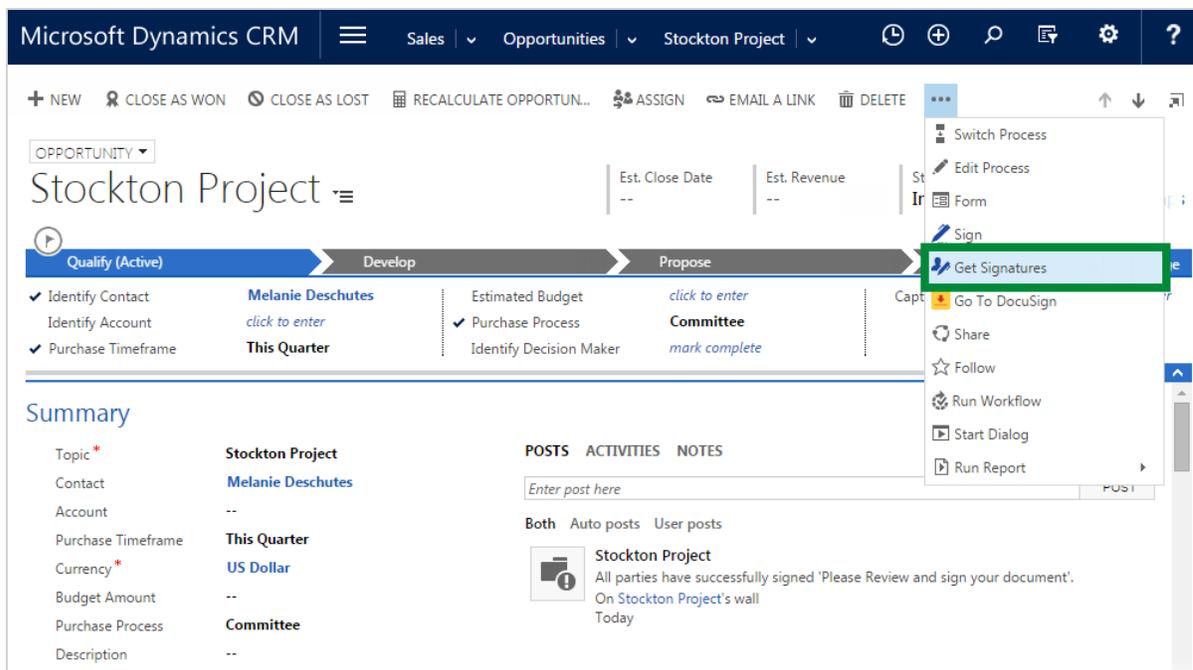
**Note: Get Signatures** allows you to send documents to other people to sign. If only you need to sign, use the [Sign](#) option instead.

This topic covers the following:

- [Get signatures](#) on the documents attached to a Dynamics 365 CRM entity and files you upload
- [Select and apply a saved template](#) that matches your documents

## To get signatures

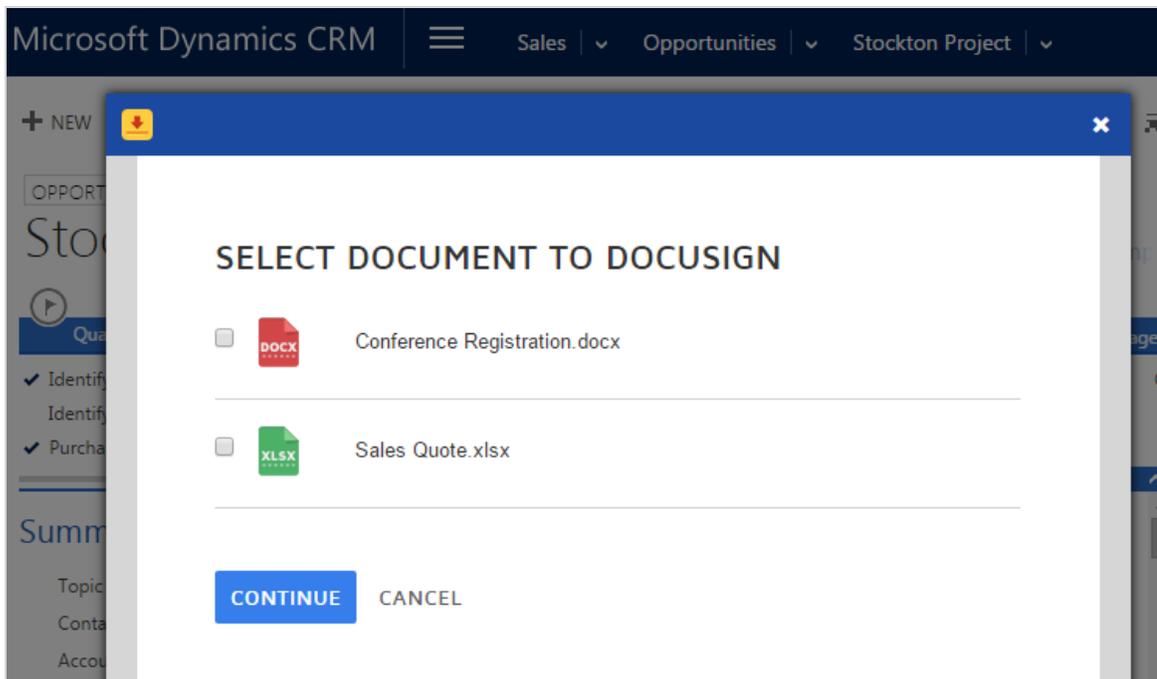
1. Select an entity and open the record from which you want to send documents.
2. In the Action toolbar, under More Commands (...), click **Get Signatures**:



The screenshot displays the Microsoft Dynamics CRM interface for a record titled "Stockton Project". The top navigation bar includes "Sales", "Opportunities", and "Stockton Project". The main area shows a process flow with stages: "Qualify (Active)", "Develop", and "Propose". Below the process flow, there are fields for "Identify Contact" (Melanie Deschutes), "Identify Account" (click to enter), "Purchase Timeframe" (This Quarter), "Estimated Budget" (click to enter), "Purchase Process" (Committee), and "Identify Decision Maker" (mark complete). A "Summary" section is visible on the left, listing fields like Topic, Contact, Account, Purchase Timeframe, Currency, Budget Amount, Purchase Process, and Description. On the right, there are sections for "POSTS", "ACTIVITIES", and "NOTES". A "More Commands" menu is open, showing options like "Switch Process", "Edit Process", "Form", "Sign", "Get Signatures" (highlighted with a green box), "Go To DocuSign", "Share", "Follow", "Run Workflow", "Start Dialog", and "Run Report". A notification at the bottom right states: "All parties have successfully signed 'Please Review and sign your document'. On Stockton Project's wall Today".

3. Depending on whether there are documents attached to the entity, do one of the following:

- **One or more documents** - The Select Document to DocuSign window opens with a list of the documents attached to the entity:



Select the documents to send for signature, and then click **Continue**.

- **No documents** - The Upload Documents window opens to let you upload a document or use a template.

**Upload Documents**

Upload documents from your computer to send to others to sign or use a template from your DocuSign account.

**UPLOAD DOCUMENTS**

OR

**CHOOSE TEMPLATE**

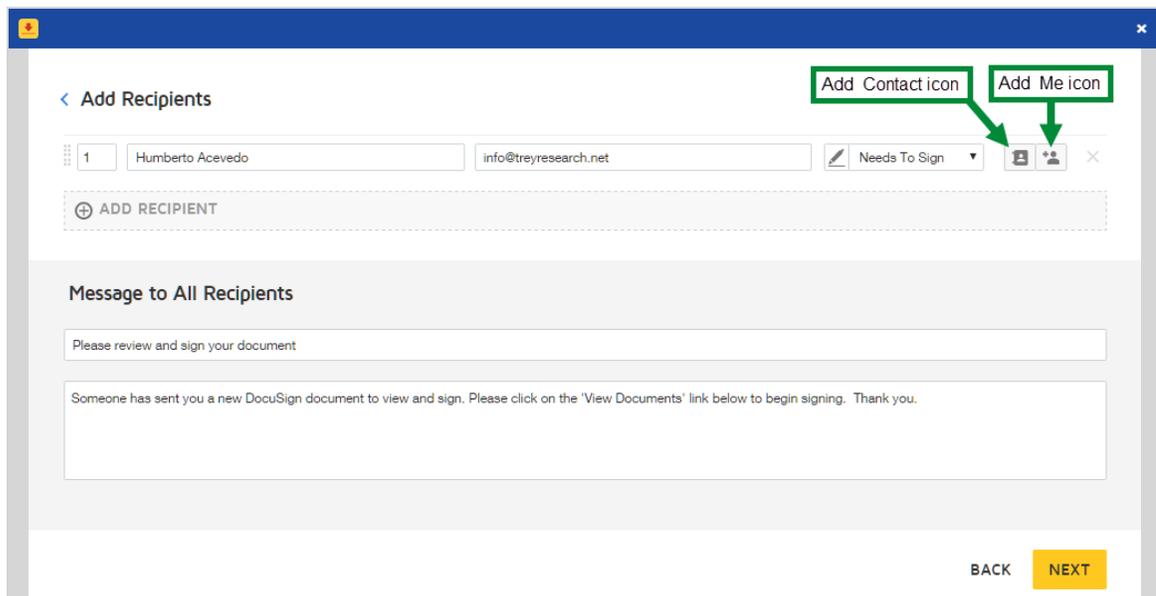
**NEXT**

Do one of the following:

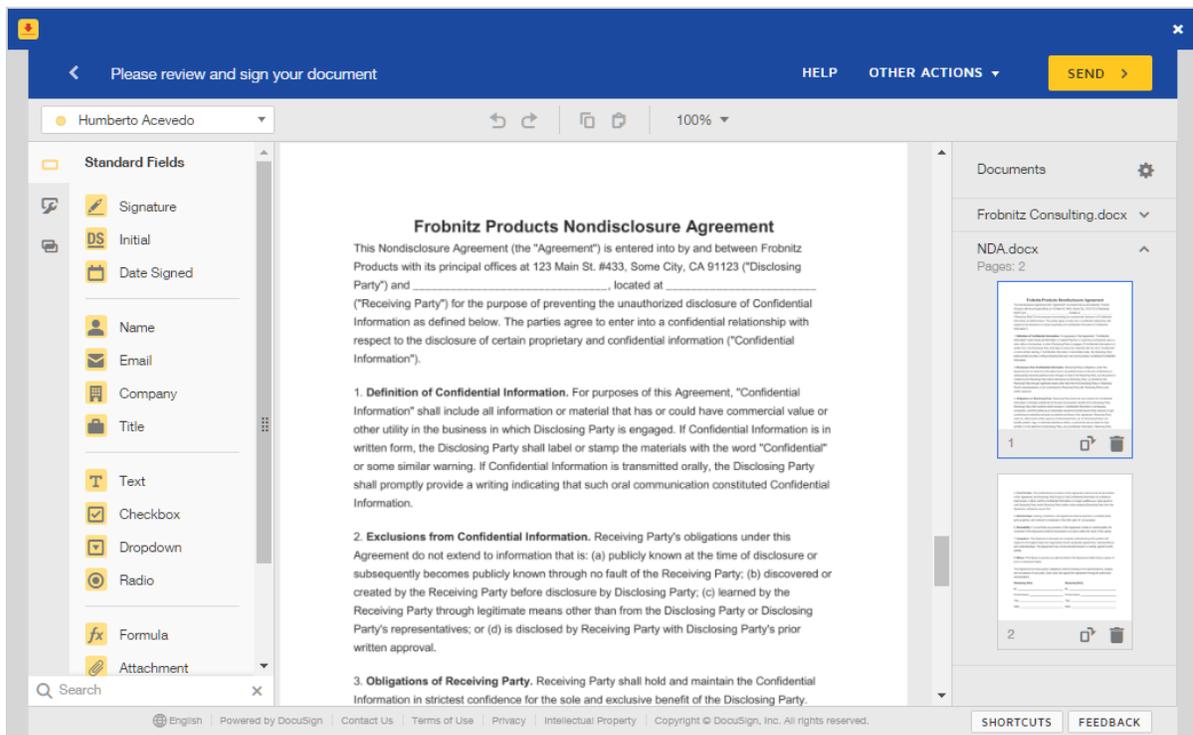
- Click **Upload Documents** to select the files to send
- Click **Choose Template** to select a template to use

Click **Next**.

The Add Recipients window appears, listing the contacts from the entity.



4. In the Add Recipients window, you can add, remove, and reorder the signers for your document.
  - **To add a recipient**, click **Add Recipient**, and then do one of the following:
    - Enter the name and email address, and then select the recipient action.
    - To select a Dynamics contact, lead, or user, click the **Add Contact** icon in the row and search for the recipient by name or email.
    - To add yourself, click the **Add Me** icon in the row.
  - **To remove a recipient**, click the **X** to the right of the recipient's row
  - **To change the signing order**, select the number next to the recipient's name and enter a new value. Recipients can sign in a set order, at the same time, or a mixture of both.
5. Review the **Message to All Recipients** and adjust the subject and message as needed.
6. Click **Next** to continue and open the document in the DocuSign Add Fields view.



7. To assign fields to a recipient, select the recipient in the Recipients list, and then drag and drop DocuSign fields from the left-hand palette onto your document.

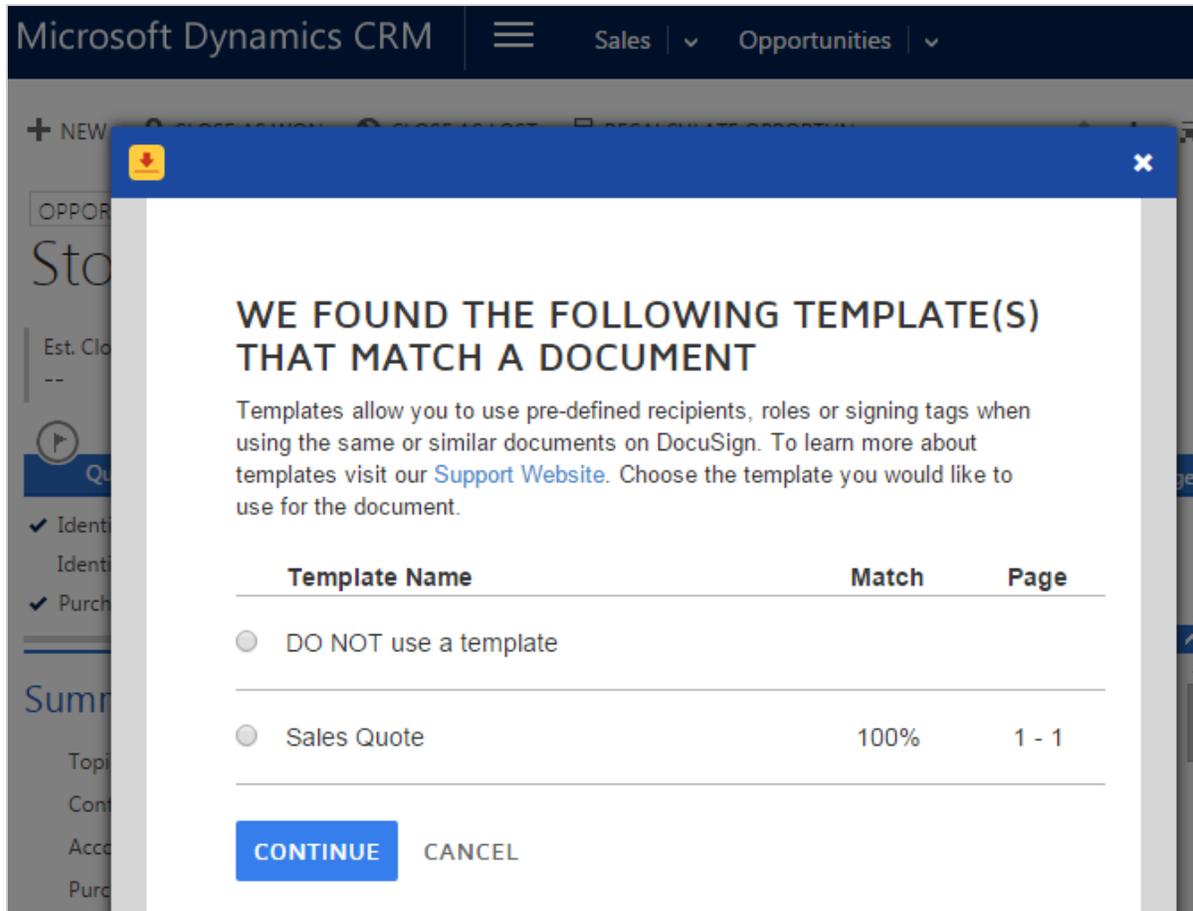
Refer to the [Add Fields](#) help topic on the DocuSign website for more details about completing your document.

8. To make further changes to the documents, recipients, reminders, and expiration settings, click **Other Actions** at the top right of the document window, and select the item you want to edit.
9. Click **Send** to send the document for signing.

The DocuSign overlay closes and the document is sent.

### To apply a matching template

1. Start a new document as described in [To get signatures](#), following steps 1-3.
2. If any of the documents you select to send for signature matches a saved template in your DocuSign account, the following dialog box appears:



3. To use a matching template, select it, and then click **Continue**.

**Note:** When you use a template, the recipient information in the template is applied to your document, in addition to the contact from Dynamics 365 CRM entity, as described in [To get signatures](#). You can edit and add recipient information as described in the following step.

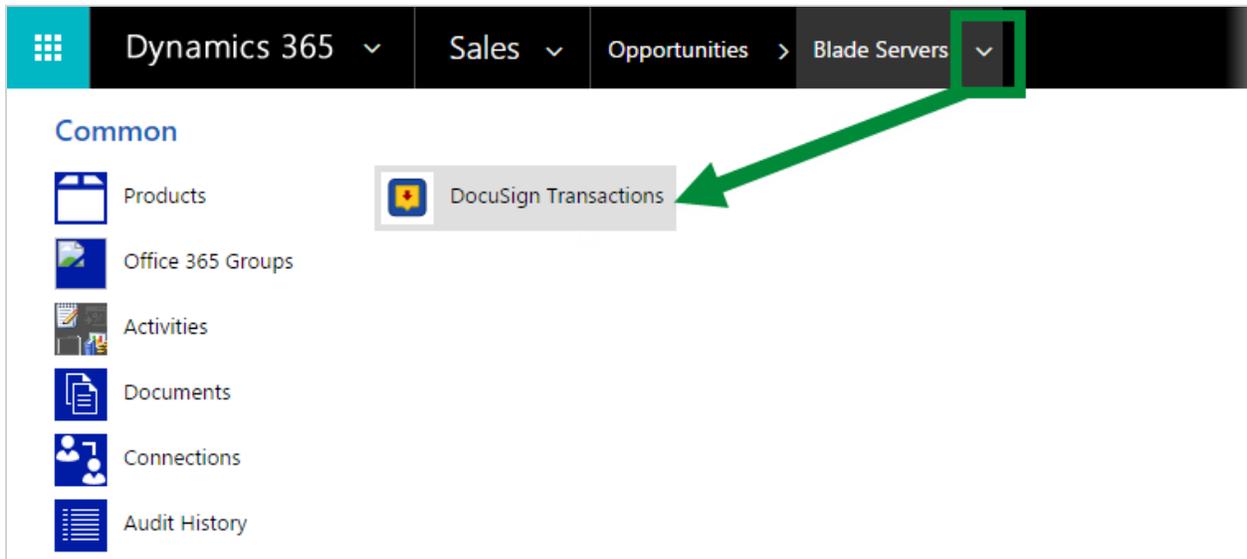
If the template has been set up to use Merge Fields, those fields are filled with the information from the Dynamics 365 CRM entity. If there is no data in the Dynamics field, the DocuSign field is left blank.

4. In the Add Recipients window, complete the Name and Email address for any recipient roles added from the template.
  - Select the **Add Me** icon to automatically enter your own name and email address.
  - Select the **Add Contact** icon to search your contacts, leads, or users.
5. Review and edit the message to all recipients as needed.
6. Click **Next** to open the document in the DocuSign Add Fields view.
7. Review the fields and add fields as needed.
8. To send the document, click **Send**.

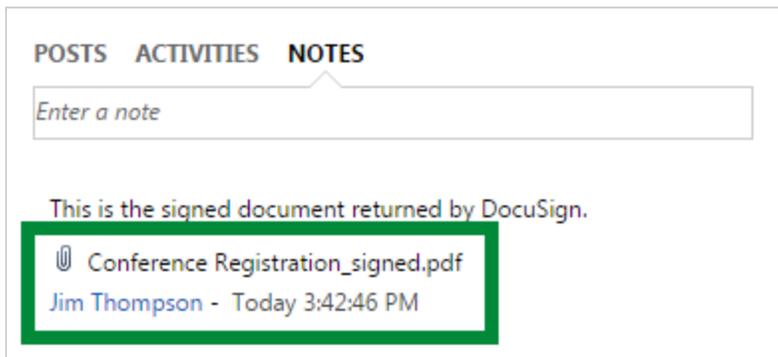
The DocuSign overlay closes and the document is sent.

### To track the status of a transaction

You can track the status of a transaction regardless of how it was sent (Get Signatures, custom buttons, or workflows) by selecting **DocuSign Transactions** under the name of the record in the top navigation bar from which the document was sent.



When all recipients have completed their actions, the signed document is stored as a PDF attachment in the Notes section.



## Sign Documents with DocuSign

**Important:** Starting with version 6.0, new customers will not have access to the Get Signatures guided flow. Instead, the Send with DocuSign custom button will be enabled. See [Send with DocuSign](#) for how to use the Send with DocuSign button.

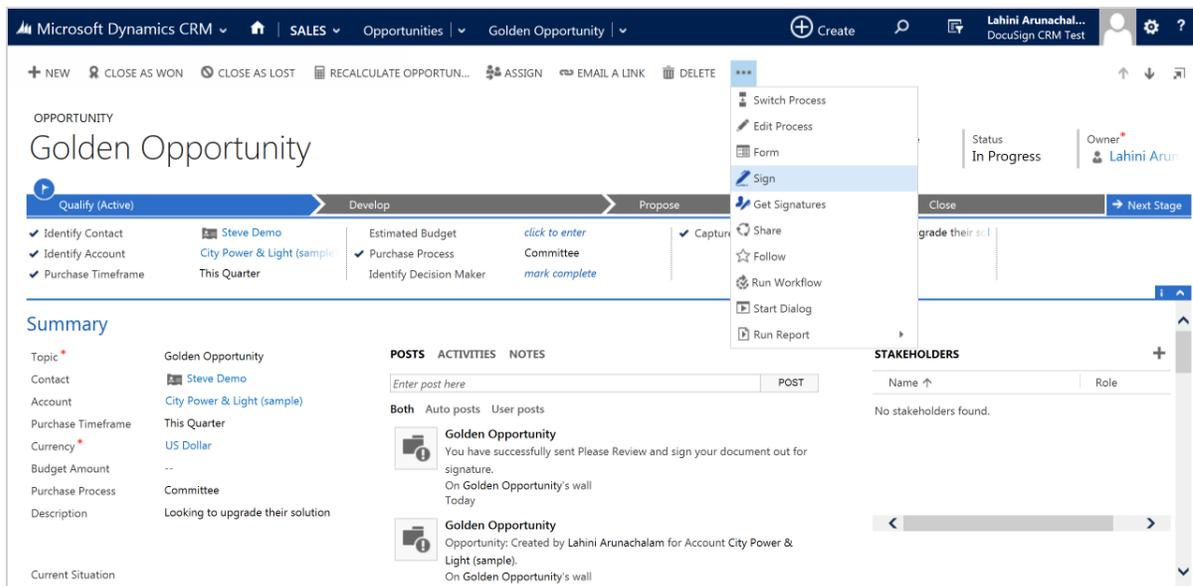
Existing customers can still use the Get Signatures guided flow, but, starting with version 6.1, all customers will be migrated to the Send with DocuSign custom button flow. The custom button flow provides the same functionality and should not require changes to customers' workflows.

With DocuSign for Dynamics Online, you can sign documents directly from records in Dynamics 365 CRM.

The **Sign** action is added to the command bar for all the entities that have been enabled with DocuSign by your Microsoft Dynamics administrator.

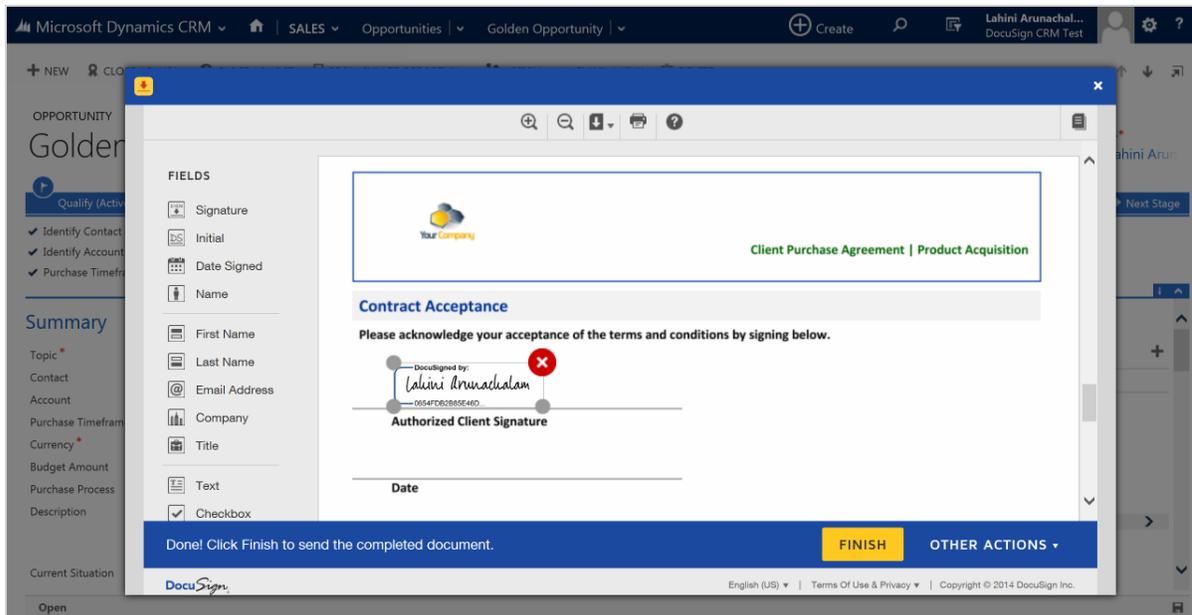
### To sign documents

1. Select an entity and open the record from which you want to sign documents.
2. In the command bar, click **Sign**.



A modal window opens and the DocuSign free-form signing page opens in Dynamics. The envelope includes all documents in the Notes section.

3. To add a signature, initial, or other information to the document, first click **Continue** to review and sign your document
4. In the Fields palette on the left side of the window, click the field you want to place, and then drag and drop the field to the appropriate location in the document.



5. After you place all the fields in the document, click **FINISH** to complete your document signing.
6. Done! You have successfully signed the document with DocuSign. The signed document is saved as a PDF file in the Notes section on the entity you signed the document from.

## Send with DocuSign Custom Menu

**Important:** Starting with version 6.0, new customers will not have access to the Get Signatures guided flow. Instead, the Send with DocuSign custom button will be enabled.

Existing customers can still use the Get Signatures guided flow, but, starting with version 6.1, all customers will be migrated to the Send with DocuSign custom button flow. The custom button flow provides the same functionality and should not require changes to customers' workflows.

With DocuSign for Dynamics 365 CRM, you can send documents for signature directly from records in Dynamics 365 CRM. The default entities enabled are Account, Contact, Opportunity, Lead, and Quote. Your Microsoft Dynamics administrator can enable additional entities with DocuSign actions, as described in [Configure DocuSign for Dynamics 365 CRM](#).

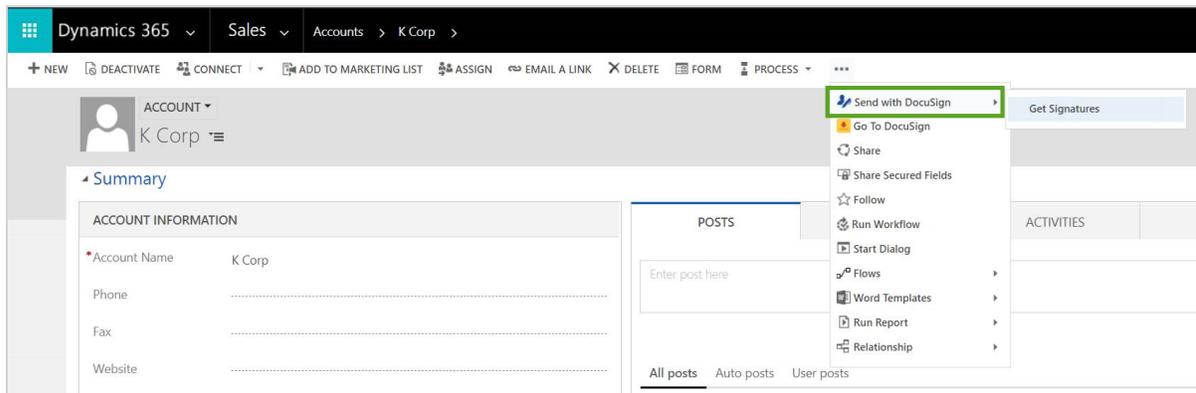
The **Send with DocuSign** menu and Get Signatures custom button are added to the command bar for all the entities that have been enabled with DocuSign by your Microsoft Dynamics administrator.

By default, clicking **Get Signatures** adds all documents in the Notes section to the envelope. All SharePoint documents are also added if the SharePoint integration is enabled.

To customize the behavior of the Get Signatures button, see [Create Custom Buttons](#).

## To get signatures

1. Select an entity and open the record from which you want to send documents.
2. In the command bar, click **Send with DocuSign**.



The DocuSign Prepare pages appears where you add documents, recipients, and can modify the default message to recipients.

3. Under **Add Documents to the Envelope**, do one of the following:



- Click **UPLOAD** to select the files to send
- Click **USE A TEMPLATE** to select a template to use
- Click **GET FROM CLOUD** to select a file from cloud storage

The documents you selected are added to the Prepare page. If any of the documents matches a saved template in your DocuSign account, a dialog box appears to let you apply the template. Refer to the [Use templates](#) help topic on the DocuSign website for more details about using templates.

4. Under **Add Recipients to the Envelope**, you can add, remove, and reorder the signers for your document. Refer to the [Add Recipients](#) help topic on the DocuSign website for more details about what you can do when adding recipients.

The screenshot shows the 'Add Recipients to the Envelope' dialog box. At the top, it says 'As the sender, you automatically receive a copy of the completed envelope.' To the right are three icons: a list icon labeled 'IMPORT BULK LIST', a plus icon labeled 'ADD FROM CONTACTS', and a document icon labeled 'SIGNING ORDER'. Below this is a checkbox labeled 'Set signing order'. The main area contains a table with one row. The first column has a 'Name' input field with a person icon on the right. The second column has an 'Email' input field. To the right of the 'Name' field are two dropdown menus: 'NEEDS TO SIGN' with a pencil icon and 'MORE' with a downward arrow. At the bottom left is a button labeled 'ADD RECIPIENT' with a plus icon.

- **To add the first recipient**, enter the name and email address, and then select the recipient action.
- **To add additional recipients**, for each recipient, click **Add Recipient**, and then enter the name and email address, and then select the recipient action for each recipient.
- **To remove a recipient**, click the **X** to the right of the recipient's row
- **To change the signing order**, select the **Set signing order** check box, and then select the number next to a recipient's name and enter a new value. Recipients can sign in a set order, at the same time, or a mixture of both.

5. Review the **Message to All Recipients** and adjust the subject and message as needed.

### Message to All Recipients

Custom email and language for each recipient

Please review and sign your document

Someone has sent you a new DocuSign document to view and sign. Please click on the 'View Documents' link below to begin signing. Thank you.

### Advanced Options

 | [Edit](#)

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires

6. Click **Next** to continue and open the document in the DocuSign Add Fields view.

The screenshot displays the DocuSign Add Fields interface. At the top, a blue header bar contains a back arrow, the text 'Please review and sign your document', 'HELP', 'OTHER ACTIONS', and a yellow 'SEND' button. Below the header, a dropdown menu shows 'Humberto Acevedo'. The main area is divided into three sections: a left sidebar for 'Standard Fields' (including Signature, Initial, Date Signed, Name, Email, Company, Title, Text, Checkbox, Dropdown, Radio, Formula, and Attachment), a central document viewer showing the 'Frobnitz Products Nondisclosure Agreement' with its text and numbered sections, and a right sidebar for 'Documents' showing 'Frobnitz Consulting.docx' and 'NDA.docx' (Pages: 2). The footer includes 'English', 'Powered by DocuSign', 'Contact Us', 'Terms of Use', 'Privacy', 'Intellectual Property', 'Copyright © DocuSign, Inc. All rights reserved.', 'SHORTCUTS', and 'FEEDBACK'.

7. To assign fields to a recipient, select the recipient in the Recipients list, and then drag

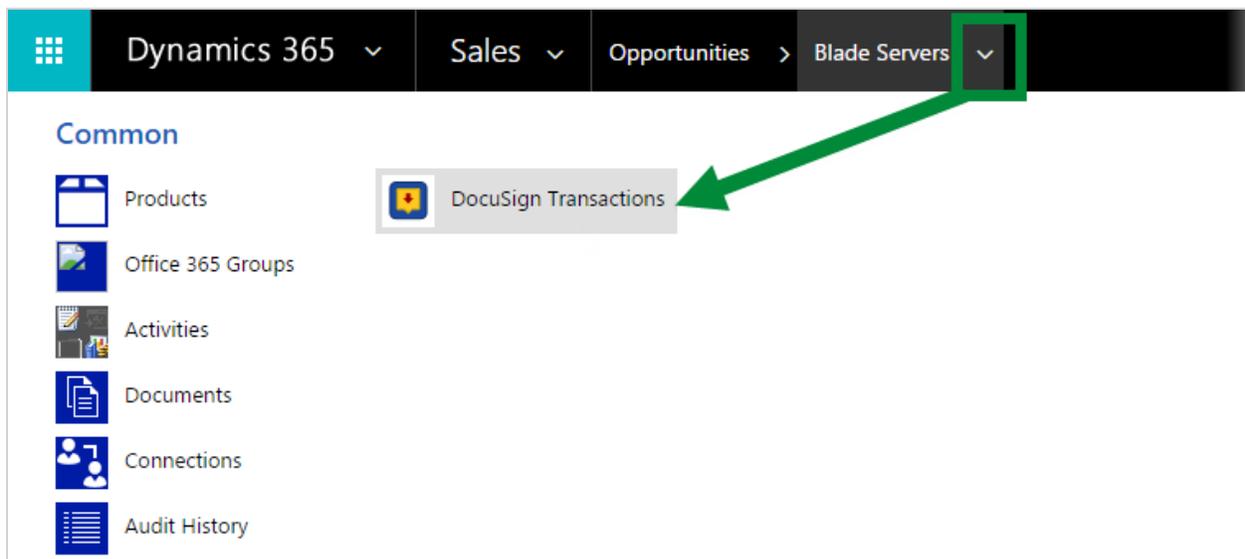
and drop DocuSign fields from the left-hand palette onto your document.

Refer to the [Add Fields](#) help topic on the DocuSign website for more details about completing your document.

8. To make further changes to the documents, recipients, reminders, and expiration settings, click **OTHER ACTIONS** at the top right of the document window, and select the item you want to edit.
9. Click **SEND** to send the document for signing.

## Track the Status of a Transaction

You can track the status of a transaction regardless of how it was sent (Send with DocuSign, custom buttons, or workflows) by selecting **DocuSign Transactions** under the name of the record in the top navigation bar from which the document was sent.



When all recipients have completed their actions, the signed document is stored as a PDF attachment in the Notes section, or in SharePoint if you have enabled the SharePoint integration.

**POSTS** **ACTIVITIES** **NOTES**

*Enter a note*

This is the signed document returned by DocuSign.

 Conference Registration\_signed.pdf  
Jim Thompson - Today 3:42:46 PM

## Customize DocuSign for Dynamics

With DocuSign for Dynamics Workflows, you can add DocuSign custom activities to your Dynamics processes, such as workflows and actions. With these custom steps, you can specify and generate a DocuSign envelope automatically within a Dynamics process for any Dynamics standard or custom entity. These steps can be part of a Dynamics workflow or part of a custom button.

You can define process steps to create the envelope either from the documents and contacts on an object, or using a template from the DocuSign account used with your Dynamics application. You can also define process steps that map DocuSign fields to Dynamics fields to create merge fields that pull Dynamics data into your document (see this [video](#) for an example of how to set up a custom workflow).

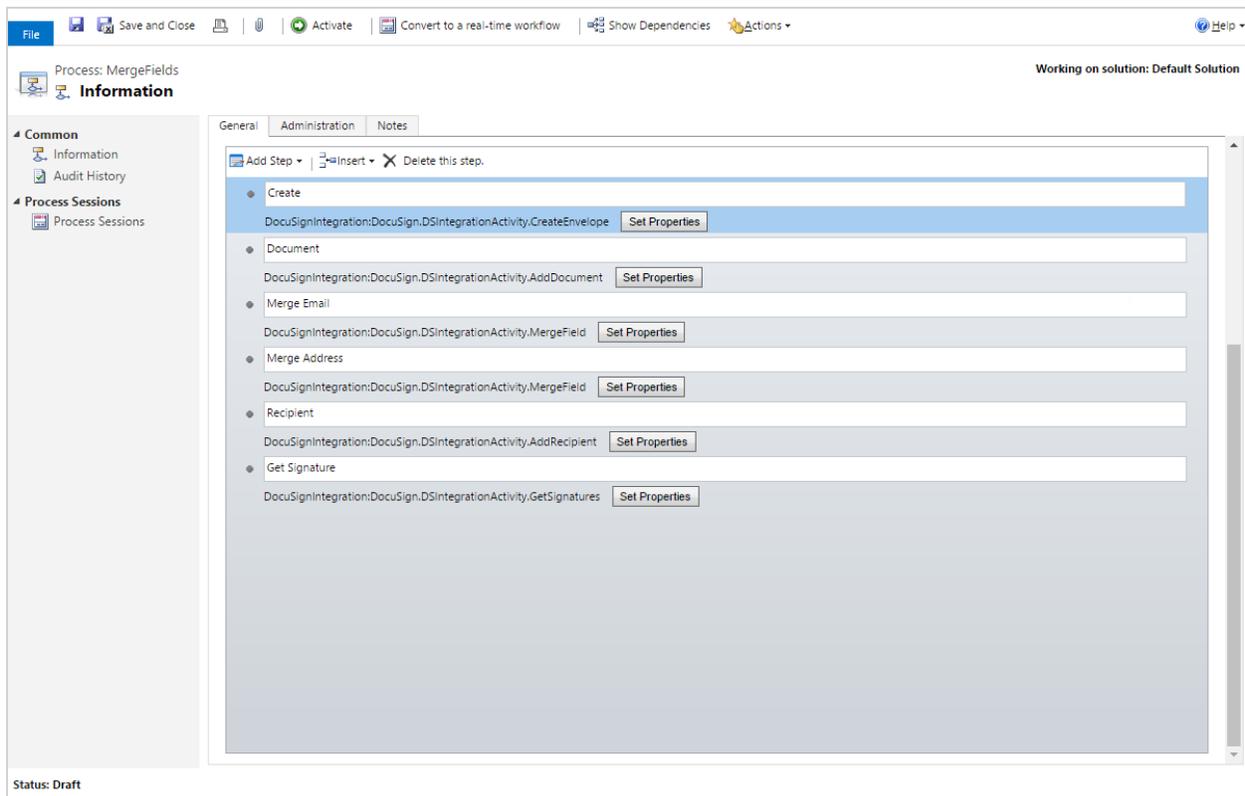
### DocuSign Custom Activities

DocuSign for Dynamics Workflows consists of six custom activities that are used to create a DocuSign transaction:

- **Create Envelope** - This is the first step in creating a DocuSign transaction. You can also create an envelope from a template by specifying a template ID.
- **Add Recipient** - Use this activity to add recipients to the DocuSign envelope. You can also use it to match recipients to template roles.
- **Add InPerson Signer** - Use this activity to add in-person signers to the DocuSign envelope. You can also use it to match recipients to template roles. The InPerson Signer will not receive an email notification from DocuSign to sign the envelope.

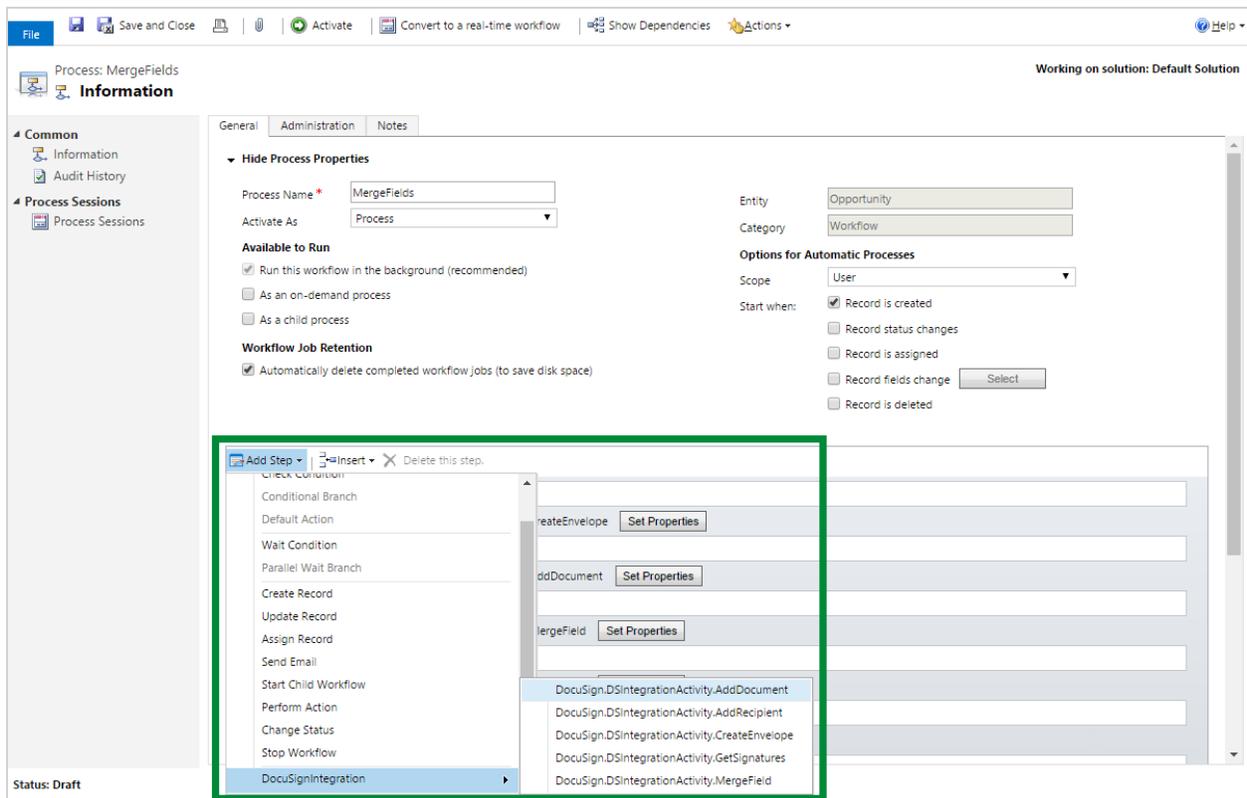
- **Add Document** - Use this activity to add documents to the DocuSign envelope. Documents must be saved in the Notes of the record, or SharePoint, if enabled, on which the custom activity is operating.
- **Get Signatures** - This activity is the final step in creating and sending a DocuSign transaction. You can send immediately, or choose to output the URL for the Add Fields view and not send the document. You can also choose which view opens: Add Fields or Prepare.
- **Get Signing View** - This activity generates a signing URL for use in an in-person signing session.
- **Merge Field** - Use this activity to map DocuSign fields on a document or template to Dynamics fields.
- **Get Field Value** - Use this activity to access data from completed documents.

Here is an example of configuring five of the custom activities as part of a Dynamics workflow:



## Add custom activities to process steps

To include a DocuSign transaction as part of a Dynamics process, you add the custom activities as steps and define their properties. The custom activities are listed in the **Add Step** menu, under the **DocuSignIntegration** selection:



When you add a DocuSignIntegrationActivity step, you define the properties as follows:

- **CreateEnvelope** - This is always the first step in creating a DocuSign transaction. The properties are all optional.

Process: Purchase Approval

### Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Subject	Single Line of Text	Optional	<input type="text"/>
Message	Single Line of Text	Optional	<input type="text"/>
TemplateId	Single Line of Text	Optional	E22B3E76-B4C9-4BD2-8265-37841CA6A

- **Subject:** Specifies a unique Subject line for the envelope. Otherwise, the value specified in the DocuSign Admin is used.
  - **Message:** Specifies a unique Message. Otherwise, the value specified in the DocuSign Admin is used.
  - **TemplateId:** Specifies an existing template from which to create the envelope. Copy and paste the template ID from the DocuSign sending account.
- **Add Document** – When included, to support the use of AutoPlace, this should be the second step in the DocuSign process (it *must* come before any Add Recipients steps). Add one Add Document step for each specific document that you want to add to the envelope. Documents are included in the envelope in the order in which you add the Add Document step. Add Document pulls files in Notes and SharePoint (if enabled). All documents are treated as a combined set before the following filters are applied. This step is optional because you can use a template in the Create Envelope step, or you can add documents manually in the DocuSign Add Fields view. You cannot use merge fields, however, when you add a document manually.

Process: Approval Workflow			
 <b>Set Custom Step Input Properties</b>			
Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
Filename	Single Line of Text	Optional	<input type="text"/>
Most Recent	Two Options	Optional	<input checked="" type="radio"/> False <input type="radio"/> True

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)

- **Filename:** Enter a complete file name to add a specific file, or search for a filename using \* as a wildcard. The file name is case insensitive. You can leave this field blank to include everything in Notes and SharePoint (if enabled) for the object. (Optional)
- **Most Recent:** Specifies whether to add the most recent file. If you specify a file in File name, and there are multiple versions, you can attach all versions (False) or just the latest version (True). If Filename is blank, you can add all files on the object (False) or just the latest file (True). (Optional)
- **Merge Field** - Map labeled DocuSign fields to Dynamics sources to automatically fill the DocuSign fields with Dynamics data. Add one merge field for each DocuSign field you want to fill. This step is optional if you are not mapping any DocuSign fields to Dynamics sources.

 Process: MergeFields  
**Set Custom Step Input Properties**

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
Recipient Id	Single Line of Text	Required	<input type="text"/>
Tag Label	Single Line of Text	Required	<input type="text"/>
Value	Single Line of Text	Required	<input type="text"/>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Recipient ID:** This is an output parameter from the Add Recipient activity. (Required)
- **Tag Label:** The DocuSign field label to map to a Dynamics source. The label must be defined in DocuSign before it can be mapped. (Required)

- **Value:** The Dynamics source mapped to the DocuSign label. Data from this source is pushed into the document. (Required)
- **Add Recipient** - Add recipients to the envelope and match recipients to template roles.

**Note:** Recipients are added as Needs to Sign by default. If you need to assign a different recipient action to someone (for example, Needs to View), then you must use a template and have the template role specify the action.

Process: Approval Workflow

 **Set Custom Step Input Properties**

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
Name	Single Line of Text	Required	<input type="text"/>
Email	Single Line of Text	Required	<input type="text"/>
Role	Single Line of Text	Optional	<input type="text"/>
RoutingOrder	Whole Number	Optional	<input type="text"/>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Name:** Specifies the recipient's name. (Required)
- **Email:** Specifies the recipient's email address. (Required)
- **Role:** Specifies the template role to map to the recipient. (Optional)
- **RoutingOrder:** Specifies where in the signing order to add the recipient. RoutingOrder is not required for envelopes that use a template. (Optional)

- **Add InPerson Signer:** This activity creates an in-person signer.

File


Process: Work Authorization - In Person

### Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
Host Name	Single Line of Text	Required	<input type="text"/>
Host Email	Single Line of Text	Required	<input type="text"/>
Signer Name	Single Line of Text	Required	<input type="text"/>
Role	Single Line of Text	Optional	<input type="text"/>
RoutingOrder	Whole Number	Optional	<input type="text" value="1"/>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
  - **Host Name:** Specifies the in-person host's name. (Required)
  - **Host Email:** Specifies the in-person host's email address. (Required)
  - **Signer Name:** Specifies the in-person signer's name. (Required)
  - **Role:** Specifies the template role to map to the recipient. (Optional)
  - **RoutingOrder:** Specifies where in the signing order to add the recipient. RoutingOrder is not required for envelopes that use a template. (Optional)
- **Get Signatures** - This activity is the final step in creating and sending a DocuSign envelope. You can send the envelope immediately or choose to output the URL for the Add Fields view.

Process: Test One Click Options  
**Set Custom Step Input Properties**

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
One Click Send	Two Options	Required	<input checked="" type="radio"/> False <input type="radio"/> True
One Click Options	Option Set	Optional	<input type="text" value="Tag"/> <ul style="list-style-type: none"> <li>Tag</li> <li>Tag</li> <li>Prepare</li> </ul>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **One Click Send:** Specifies whether to send the envelope immediately. (True) sends the envelope immediately. (False) outputs the URL of the Add Fields view for the envelope, without sending. You can use this URL to program additional actions on the envelope.
- **One Click Options:** Specifies whether to open the DocuSign Add Fields view (Tag) or the Prepare view when getting signatures.
- **Get Signing View:** Generates the in-person signing session URL for input into the Assign URL action.

**Note:** This activity only available following the Add InPerson Signer activity, and only with a sent envelope.

File

Process: Work Authorization - In Person

### Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input style="width: 100%;" type="text"/>
RecipientId	Single Line of Text	Required	<input style="width: 100%;" type="text"/>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **RecipientID:** Specifies the in-person signer. This is the output of the Add InPerson Signer activity. (Required)
- **Get Field Value:** Access data from a completed document to update fields in Dynamics or to trigger additional workflows.

Process: Update Opportunity Merge Field

### Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input style="width: 100%;" type="text"/>
Tag Label	Single Line of Text	Required	<input style="width: 100%;" type="text"/>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)

- **Tag Label:** The DocuSign field label to map to a Dynamics source. The label must be defined in DocuSign before it can be mapped. It must also be unique across all recipients (two recipients cannot have the same tag label). (Required)

The output of the Tag Label is the field value from the DocuSign envelope. It can be formatted as one of: Boolean, Date/Time, Decimal, Double, Integer, Money, or Text.

## Create Custom Buttons

Custom buttons let you customize the UI and also let you use advanced DocuSign features, including recipient authentication, Standards-Based Signatures, template matching, bulk send, private messages, and many more.

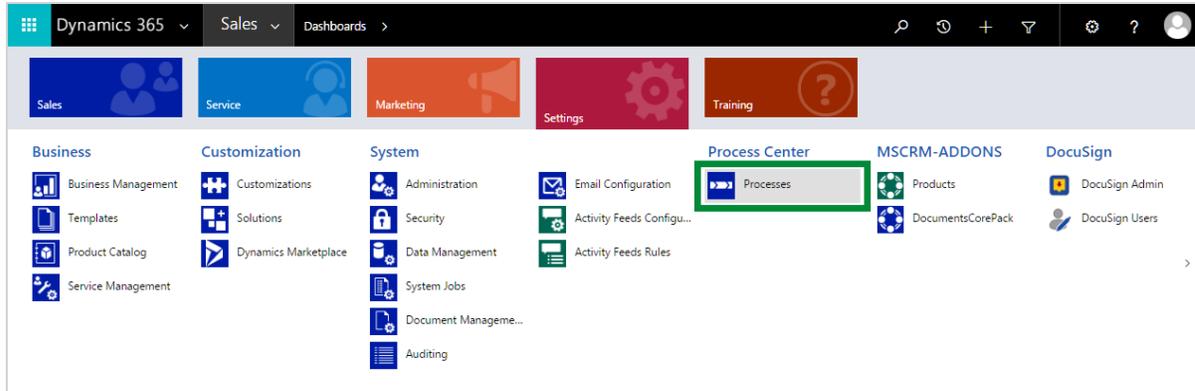
Creating a custom button requires no JavaScript or coding; you use the same workflow components that are already integrated into the Dynamics process framework. You can use any existing components. You can also combine DocuSign actions and built-in Dynamics actions. We've provided a default action, called *Get Signatures*, that pulls attachments from the Dynamics record and creates a draft document and opens it in the Prepare view. This is a global action that works on all entities. Custom buttons that use DocuSign features are populated in the **Send with DocuSign** menu on entities that are enable with DocuSign.

There are three restrictions to creating custom buttons:

- You cannot change the name of the default button because of a limitation in Dynamics; it's always called *Get Signatures*
- The action for your custom button must be unmanaged with the default namespace prefix of (new\_). We are not able to dynamically read the namespace prefix.

Follow these steps to create a custom button:

1. Go to the Dynamics Process Center to create an action for your button.



The following image shows an example of an action called *Customer Info*, which pulls data from an opportunity and creates a document.

General
Administration
Notes

**▼ Hide Process Properties**

Process Name \*

Unique Name \*

Activate As

Entity

Category

Enable rollback

**Workflow Log Retention**

Keep logs for workflow jobs that encountered errors

**▼ Hide Process Arguments**

+ - ↑ ↓ ↕ ↕

Name	Type	Required	Direction
EnvelopeURL	String	Optional	Output

Name \*

Type \*

Entity

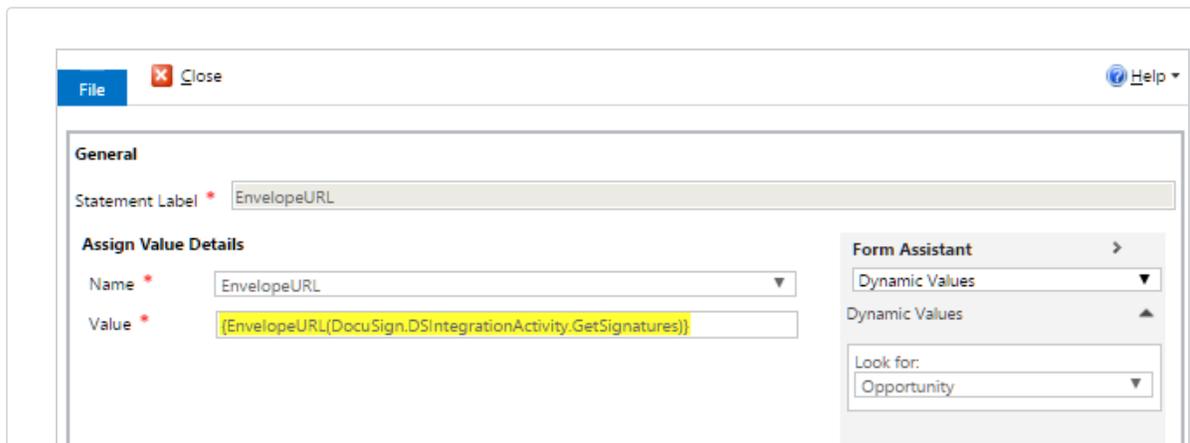
Required

Direction  Input  Output

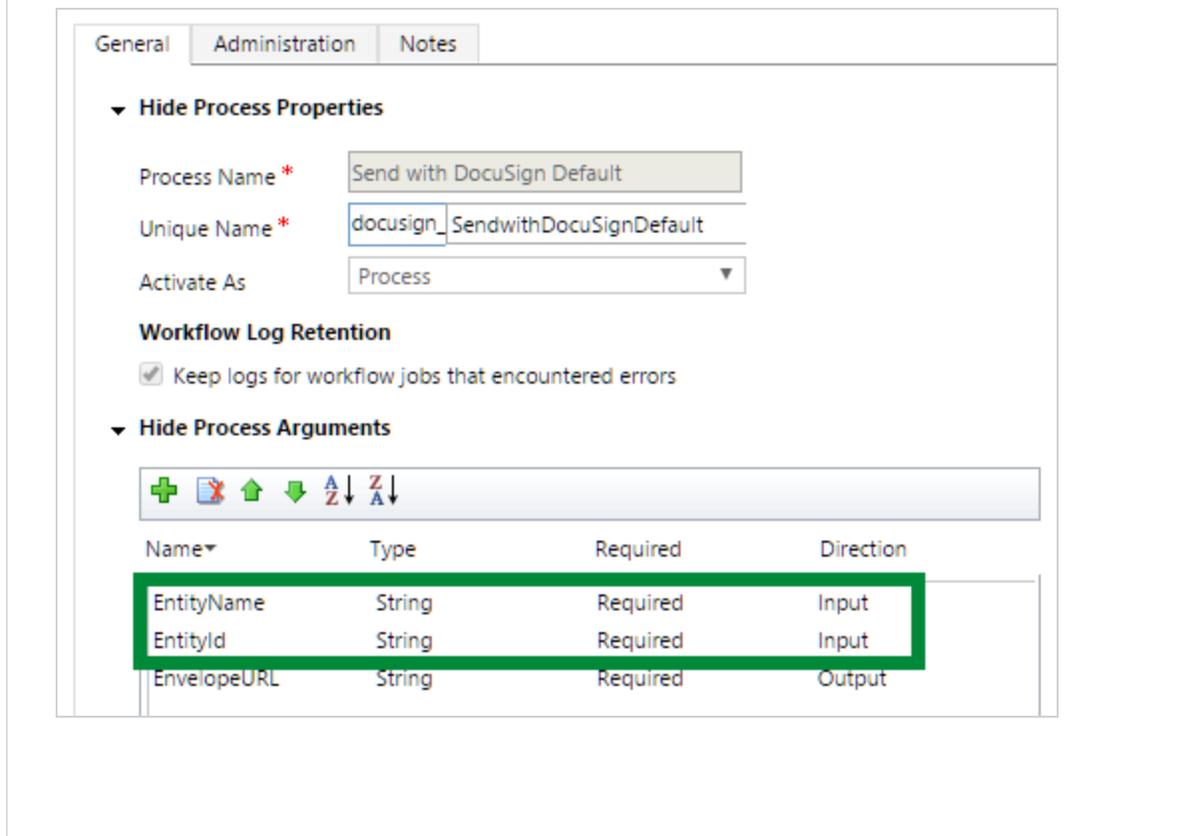
Description

- DocuSignIntegration:DocuSign.DSIntegrationActivity.CreateEnvelope [View properties](#)
- DocuSignIntegration:DocuSign.DSIntegrationActivity.AddDocument [View properties](#)
- DocuSignIntegration:DocuSign.DSIntegrationActivity.AddRecipient [View properties](#)
- DocuSignIntegration:DocuSign.DSIntegrationActivity.MergeField [View properties](#)
- DocuSignIntegration:DocuSign.DSIntegrationActivity.GetSignatures [View properties](#)
- **EnvelopeURL**  
Assign Value: EnvelopeURL [View properties](#)

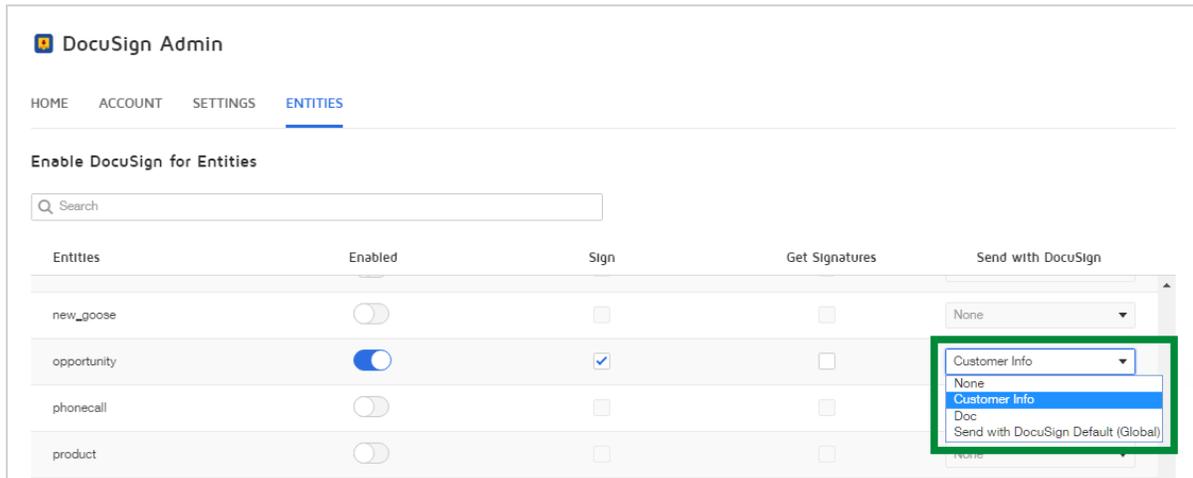
**Note:** When you create an action for a custom button, you must create an output parameter called *EnvelopeURL* and assign it the URL from the Get Signatures or Get Signing View steps.



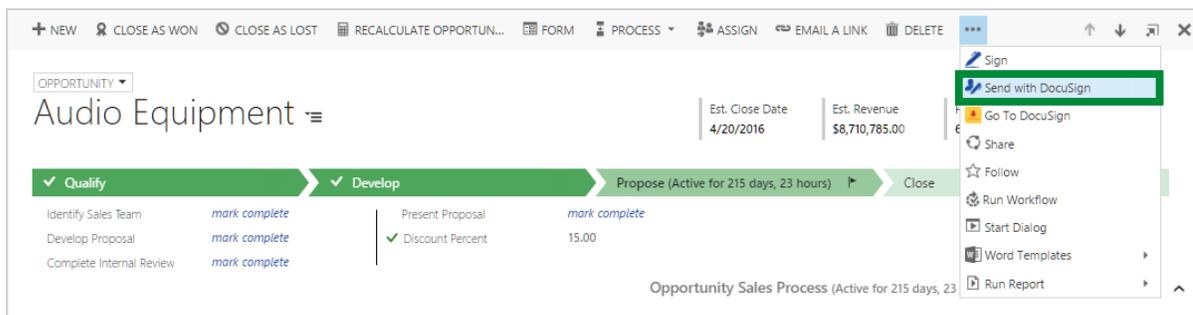
In addition, if you create a Global action for a custom button, you must create two String input parameters called EntityName and EntityId (with nothing assigned to them).



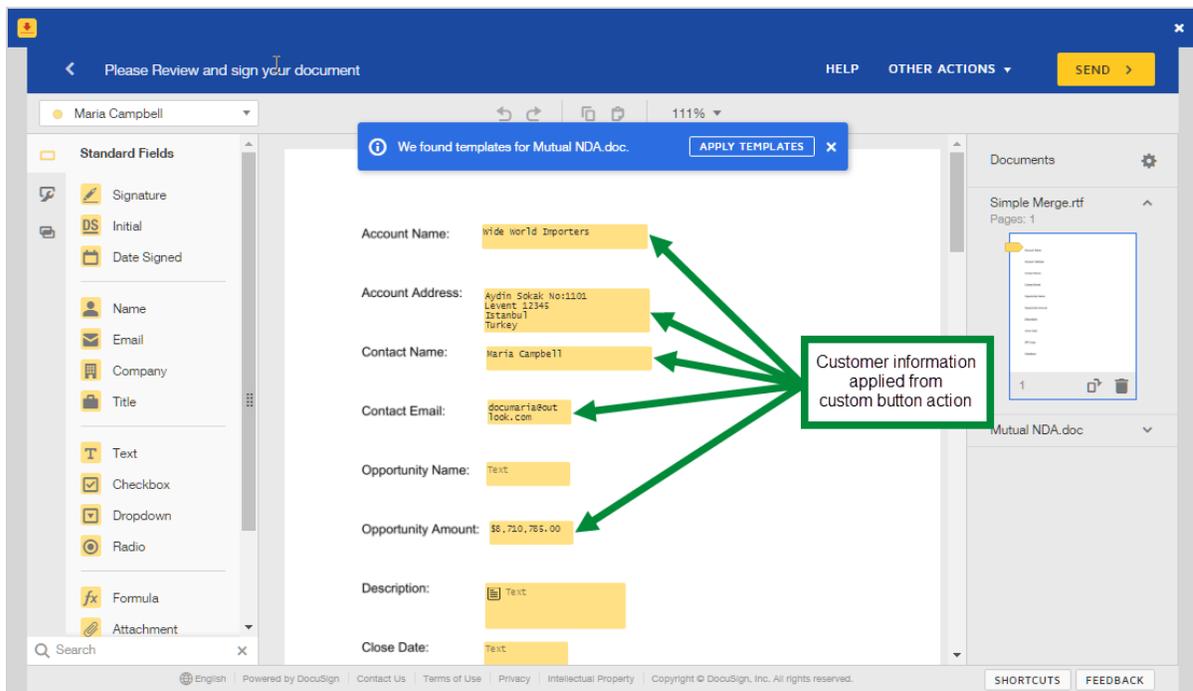
2. After your action is defined and saved, go to DocuSign Admin, and under the Entities tab, set the Send with DocuSign button to use the action you just created (the following image shows the Customer Info action).



3. Open an opportunity, and then, under the command bar, click **Send with DocuSign**.



The document opens in the DocuSign Add Fields page with information from the opportunity already applied to the document with the Customer Info action.



## AutoPlace text

DocuSign for Dynamics 365 CRM workflows support standard AutoPlace functionality. AutoPlace can only be used in workflows and custom buttons.

AutoPlace is a feature that allows text to be used in documents as a placeholder for signature, initial, and other fields for recipients. You manually place the text into your documents where you want each recipient to take some action. When you send the document using DocuSign, the appropriate DocuSign fields are placed in the AutoPlace locations.

Here's how AutoPlace works in Dynamics 365 CRM:

1. Create a custom field with the AutoPlace text (see this [topic](#) for information about how to create a custom field). The AutoPlace text must end with `{r}`; for example, the AutoPlace text for a signature placeholder is `ls{r}`l.

The following table shows the AutoPlace text you should use in custom fields for different field types.

Field Type	AutoPlace Text
Signature	<code>\s{r}\</code>
Initial	<code>\i{r}\</code>
Optional Initial	<code>\oi{r}\</code>
Name	<code>\n{r}\</code>
Company	<code>\co{r}\</code>
Title	<code>\t{r}\</code>
Date Signed	<code>\d{r}\</code>

2. Create an envelope using workflows or a custom button.
3. Add recipients to the envelope with the Add Recipient activity. Each recipient you add is assigned an ID. The first recipient you add is assigned 1, the second is assigned 2, and so on. This has nothing to do with signing order; it's simply the order in which you add recipients with the Add Recipient activity.
4. Type the AutoPlace text in the document with the recipient ID in place of `{r}` (based on the Add Recipient activity, *not* on signing order).

For example, to add:

- A Signature tag for the second recipient, you would type `\s2\` in the document.
- A Company tag for the third recipient, you would type: `\co3\` in the document.
- A Title tag for the first recipient, you would type: `\t1\` in the document.

5. After typing the AutoPlace text, change the color of the AutoPlace text to white or to the background color of the document. This way, the AutoPlace text does not appear when the document is viewed, making the AutoPlace text invisible to recipients of the document.

In the following example, AutoPlace text is added to place an initial, signature, name, title, and date signed tags for recipient 1. The text has been highlighted so it can be viewed.

|

**Important!** You *must not* use the AutoPlace text in *any* other location in the document unless you want DocuSign to add the fields to each text location where that AutoPlace text appears.

## Set up merge fields

In addition to standard DocuSign [AutoPlace](#) fields, you can use merge fields when you send documents for signature. You do this by mapping fields on your document to data fields in Dynamics. You can use merge fields to pull data from Dynamics, and starting with version 6.0, you can set up a merge field to write information back to Dynamics from

DocuSign (see this [video](#) for an example of setting up merge fields). The information you write back can be used to update Dynamics records or to trigger additional workflows when an envelope is completed.

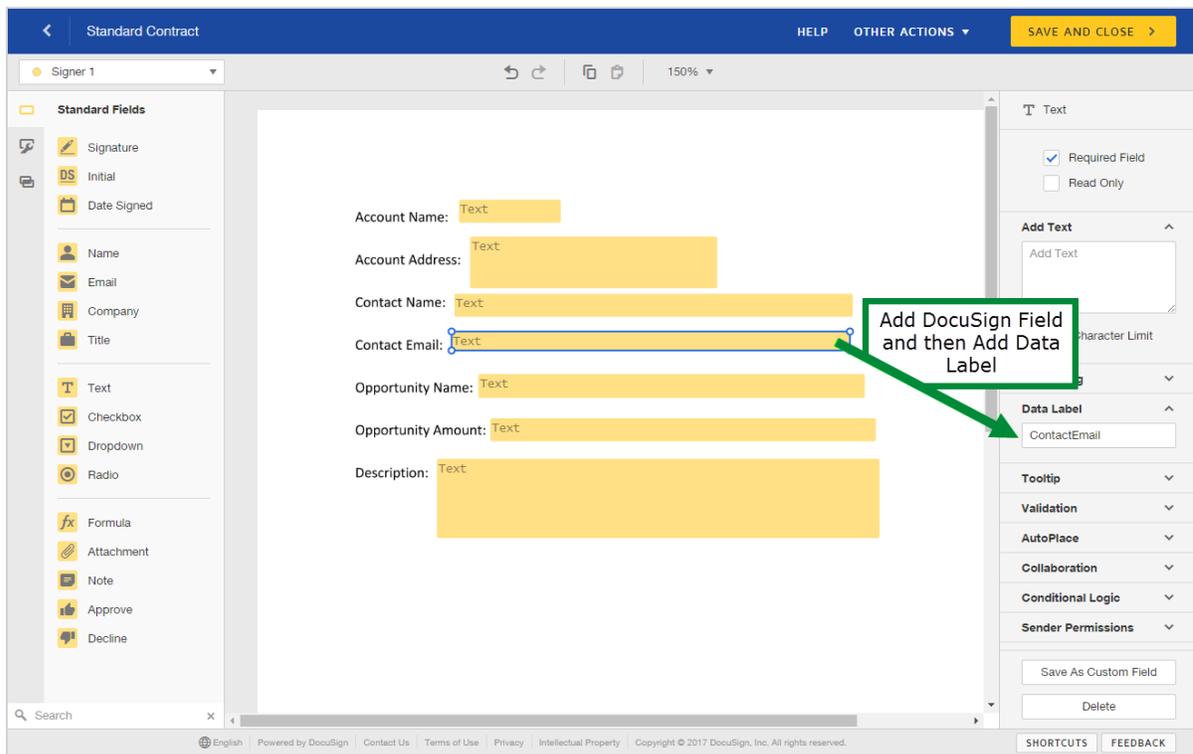
Follow these steps to set up merge fields:

1. Create a document, add fields to the document (you can use most standard DocuSign fields as well as custom fields, which may contain AutoPlace text), and add a Data Label for each field from which you want to pull Dynamics data or into which you want to push DocuSign data. The labels are used to map the DocuSign fields to corresponding Dynamics sources to merge data into and out of the document. Only those fields you plan to use as merge fields require Data Labels.

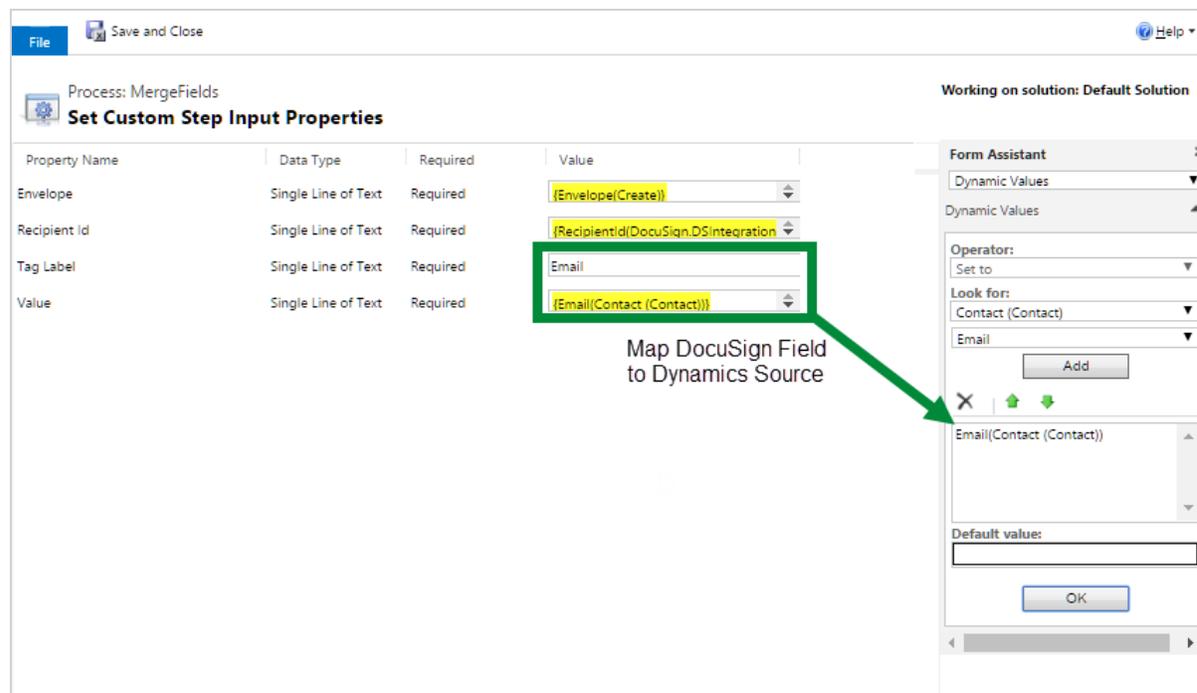
**Note:** Merge Fields support all DocuSign field types *except* radio buttons and drop down lists.

Merge Fields also do not support one-to-many relationships, such as merging multiple products related to an Opportunity, because of a limitation in the way data mapping works in Dynamics.

To use Payments with merge fields, set up the payment as a formula field and reference a number field into which you merge data.



2. Save and close the document.
3. Create a process that uses the document and map the DocuSign fields to the Dynamics data sources with a Merge Field step for each labeled field you want to fill with Dynamics data, or from which you want to retrieve DocuSign data.



## Set up merge field write backs

Merge field write backs let you update records in Dynamics when a DocuSign envelope is completed. You can get the value of a DocuSign field from a completed envelope and use it to update a record in Dynamics, kick off an approval based on the value, send an email, create additional records, etc.

1. Create a workflow on the DocuSign Transaction entity. This workflow should run when Envelope Status changes.
2. Use the Check Condition action to see whether the Envelope Status is completed (you can see all status codes [here](#).)
3. Add a condition for the specific entity, if needed (e.g., opportunity lookup contains data)

- Scope – Organization
4. Use the Get Field Value activity to get the value of the field.

**Note:** The tag label must be unique across all recipients in the envelope.

5. Use Update Record to update the record with the value from Get Field Value.
  - The associated record is the relevant lookup, depending on the entity
  - Use the appropriate output value based on the data type needed

## FAQ

Author's Note: this content is repeated in an article on Dynamics FAQs

<https://support.docusign.com/en/articles/FAQs-related-to-DocuSign-for-Dynamics-CRM-Online>. When this content changes, that article should be updated to match.

### **How will I know when my free account is running low on document transactions?**

- DocuSign provides a warning when your free account is running low on transactions.

### **How can I access my DocuSign account?**

- From any entity, in the command bar, click the Go to DocuSign link. The DocuSign web application opens in a modal over your Dynamics 365 CRM window.

### **Why aren't my DocuSign status updates automatically updated in Microsoft Dynamics 365 CRM?**

- If you aren't seeing real-time status updates on your DocuSign Transaction status records, open the DocuSign Admin, and follow the onscreen instructions to authorize access.

### **Where are completed documents stored?**

- By default, completed documents appear in the Notes section as a PDF. Completed documents are saved in the associated SharePoint folder if the SharePoint integration is enabled.

**What DocuSign-related updates are posted to my entity's activity feed?**

- There are two different DocuSign transaction status changes that are captured on an entity's activity feed. The feed is updated when:
  - A document is successfully sent using DocuSign
  - When all parties complete signing a DocuSign document

**What should I do if I see several login prompts when trying to access CRM records in the Dynamics Online Outlook Connector?**

- Ensure that you add the following sites to your Internet Explorer "Trusted Site" list:
  - <https://login.live.com>
  - <https://signin.crm.dynamics.com>
  - [https://\\*.crm.dynamics.com](https://*.crm.dynamics.com)

**Do I have to give the other Microsoft Dynamics 365 CRM account users my DocuSign credential information so they can send with DocuSign?**

- No. If you created a new account, it is automatically set up to allow other users in your account to send with DocuSign. If you have a DocuSign account, enable the **Account-Wide Rights** and **Send On Behalf Of Rights (API)** features for your account. This allows the other users in your account to send with DocuSign.

**Not all my Microsoft Dynamics 365 CRM users have DocuSign accounts. Can they still use DocuSign for Dynamics 365 CRM?**

- Your Dynamics 365 CRM users must be members of the DocuSign account specified in the DocuSign Config. When a Dynamics 365 CRM user uses a DocuSign action, the system checks to see whether that user exists in the specified DocuSign account, using the user's Dynamics email address. If the user does not exist in the DocuSign account, they

are directed to the account administrator for assistance. See [Manage User Access to DocuSign](#) for more information.

**It looks like importing DocuSign for Dynamics 365 CRM into my Dynamics 365 CRM instance overwrites my custom site map. What should I do?**

- There is a known issue in Microsoft such that site map customizations included in a managed CRM solution overwrite the custom SiteMap in a CRM organization. You will have to recreate the custom SiteMap entities by editing the SiteMap. Please see [http://msdn.microsoft.com/en-us/library/gg334430\(v=crm.7\).aspx](http://msdn.microsoft.com/en-us/library/gg334430(v=crm.7).aspx) for more information.

**Will DocuSign for Dynamics 365 CRM work with any display language?**

- Yes. The DocuSign package supports all Dynamics display languages. The DocuSign package is English only, but your Dynamics display language can be set to any language. However, a Dynamics restriction requires that the Base Language for the Dynamics organization and the Personal Option Languages setting for the user installing the solution must be set to the same language. Otherwise, you may encounter issues installing DocuSign in your Dynamics organization.

**Does DocuSign for Dynamics 365 CRM work within Dynamics Business Units?**

- Yes. DocuSign for Dynamics supports Business Unit groups. Just be sure to install the solution at the top of the organization hierarchy, rather than at the Business Unit level. This structure ensures that the solution is accessible by all parts of your organization.

**Will this solution package work in Microsoft Dynamics on-premise?**

- DocuSign for Dynamics 365 CRM supports Microsoft Dynamics Online instances only.

## For More Information or Assistance

For more information or assistance, visit [DocuSign Support](#), the [DocuSign Community](#), [docusign.com](#), or [contact DocuSign Support](#).