

airSlate for MS Dynamics 365 User Guide

Requirements:

- airSlate account
- MS Dynamics 365 account
- MS Flow account

airSlate Admin Tools in MS Dynamics 365	2
How to access	2
Account	3
Workspace	4
Teammates	5
Custom buttons	6
Before you begin: basic airSlate Flow settings	10
Create Flow	10
Setup Bots: Find & Install an MS Dynamics 365 Bot	15
Setup Bots: Connection Settings	16
Setup Bots: General Settings - Find a record	18
Setup Bots: General Settings - Mapping	22
Distribute Flow	24
Export a completed slate to the Dynamics 365 record	29
Create MS Dynamics 365 record using data from a completed slate	33
Update MS Dynamics 365 record using data from a completed slate	36
Prefill a slate with data from the MS Dynamics 365 record	41
Send a Slate to MS Dynamics 365 Contact	51
Prefill from Dynamics 365 bot + airSlate MS Flow connector	53
Stage 1. Create a Flow in airSlate with the Prefill from Dynamics 365 bot.	53
Stage 2. Connect the Dynamics 365 account to the Prefill from Dynamics 365 bot	59
Stage 3: Create the MS flow with the airSlate Flow from Stage 1	66

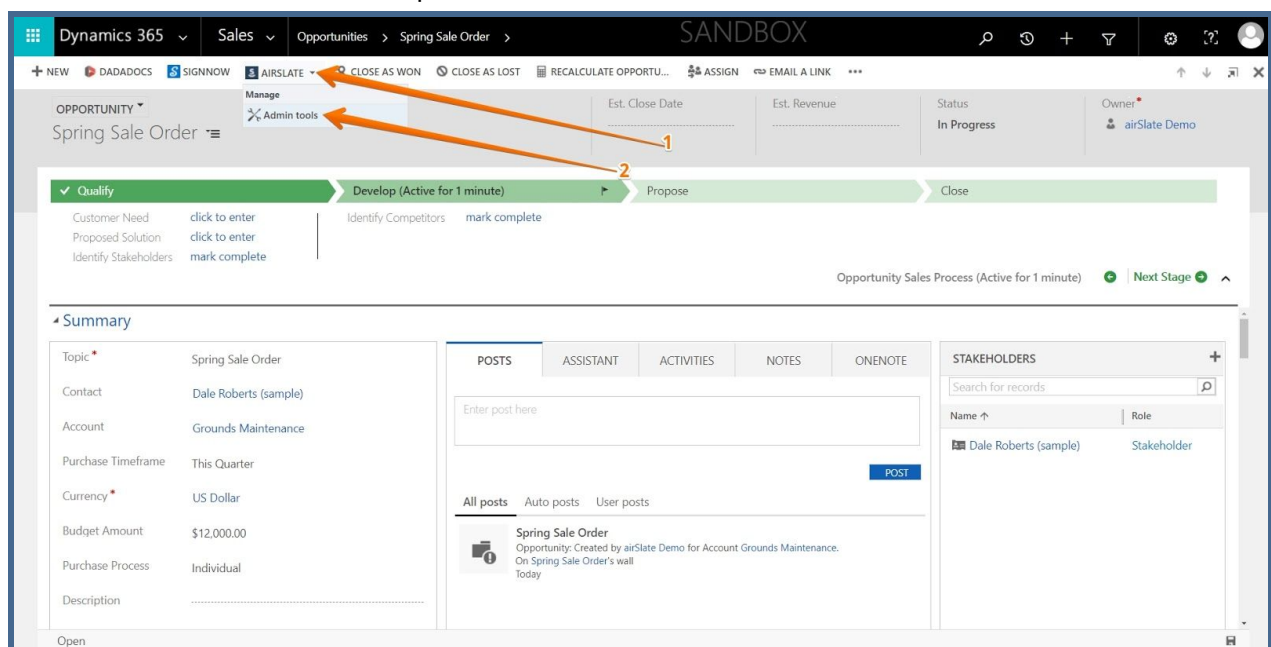
airSlate Admin Tools in MS Dynamics 365

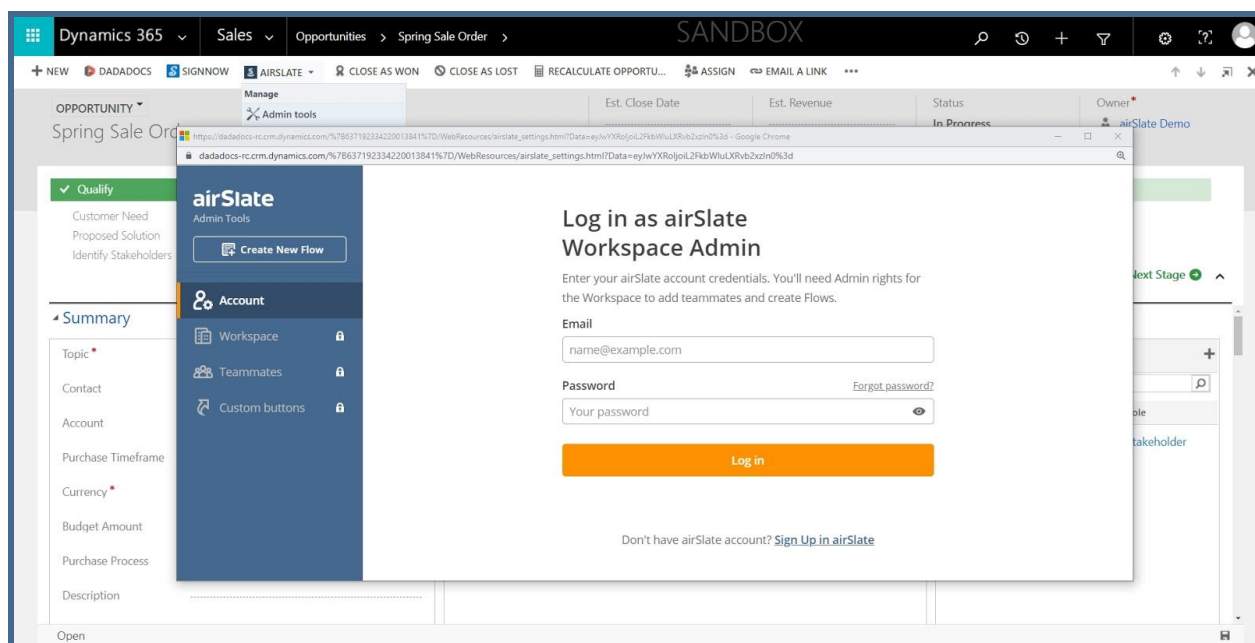
airSlate Admin Tools - part of the airSlate application for configuring:

- Access to the specific airSlate Workspace;
- Shared Flows with teammates from your MS Dynamics 365 organization;
- Custom buttons in MS Dynamics 365 records that run a Flow in airSlate.

How to access

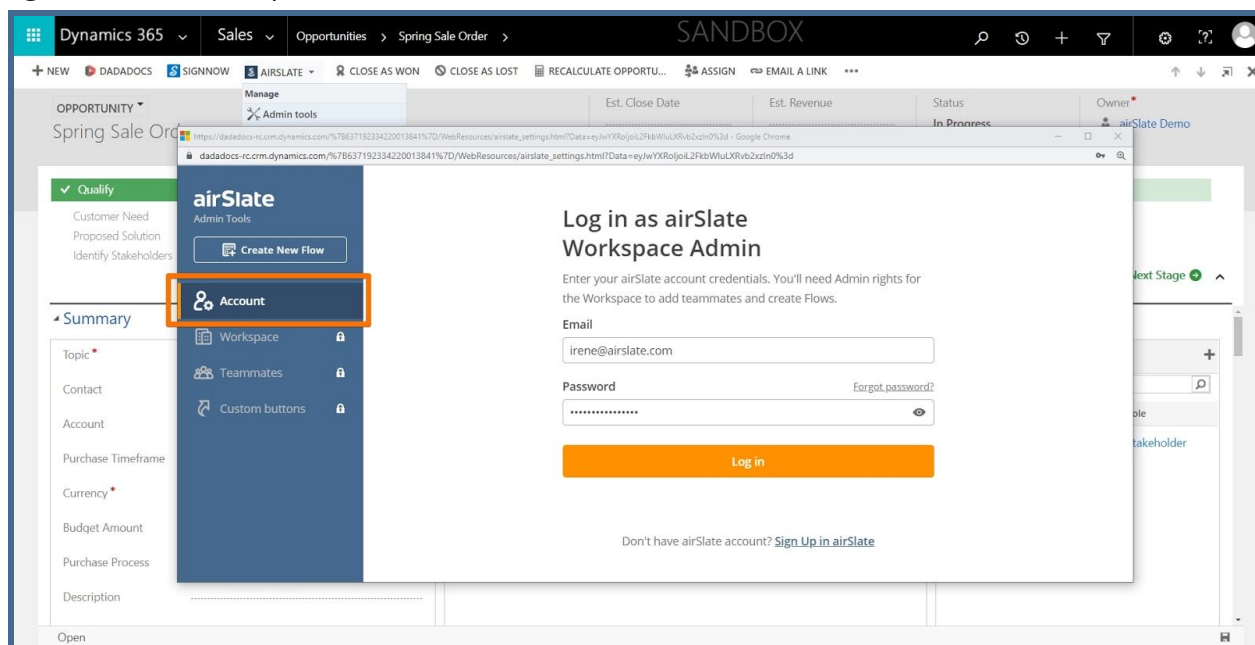
Go to any record in your organization and select **airSlate** in the command bar. Then click on the **Admin tools** in the dropdown menu.



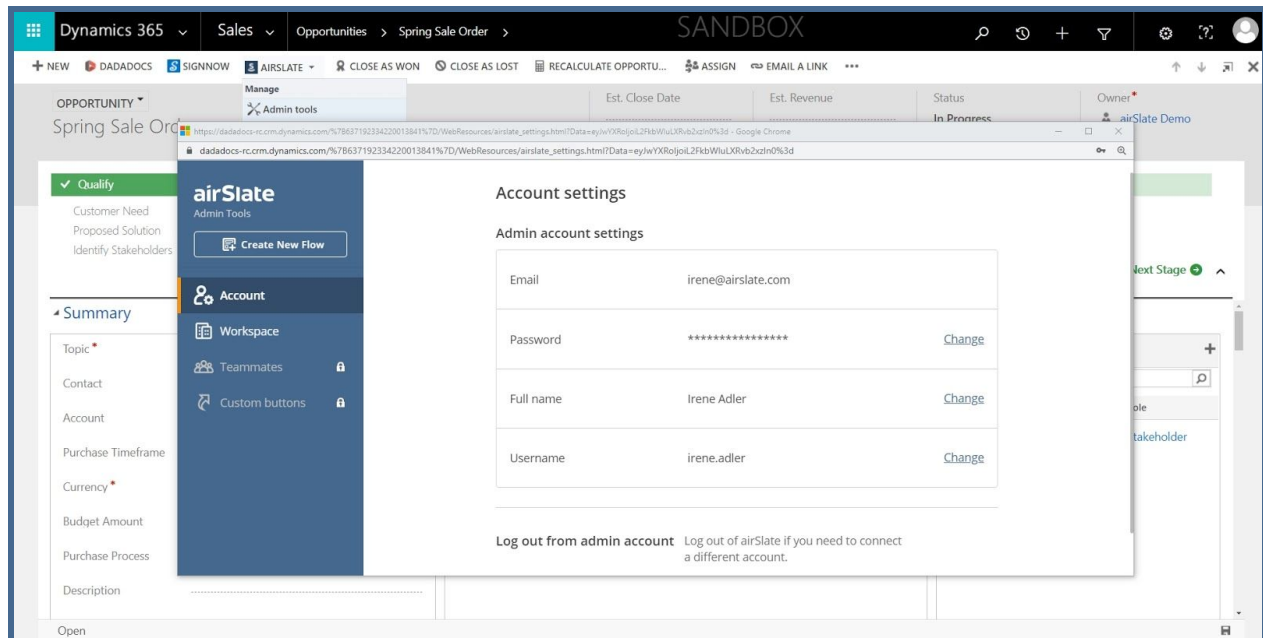


Account

In the Account section, connect your airSlate account. Use the account that has Admin rights for the workspace.

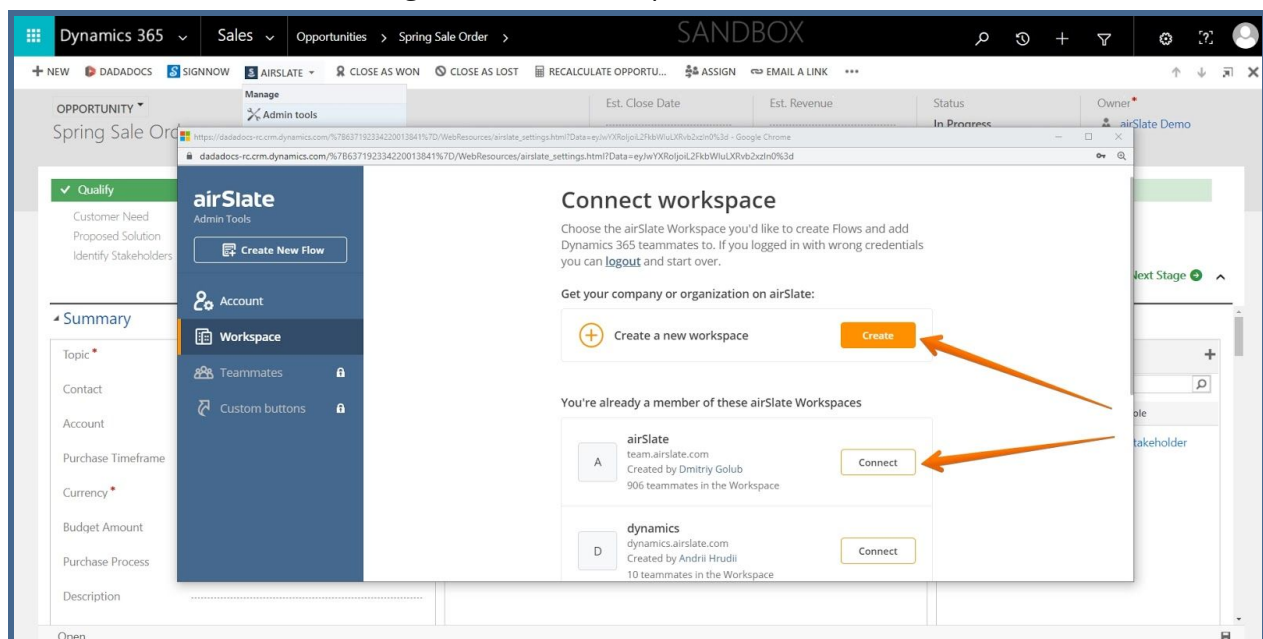


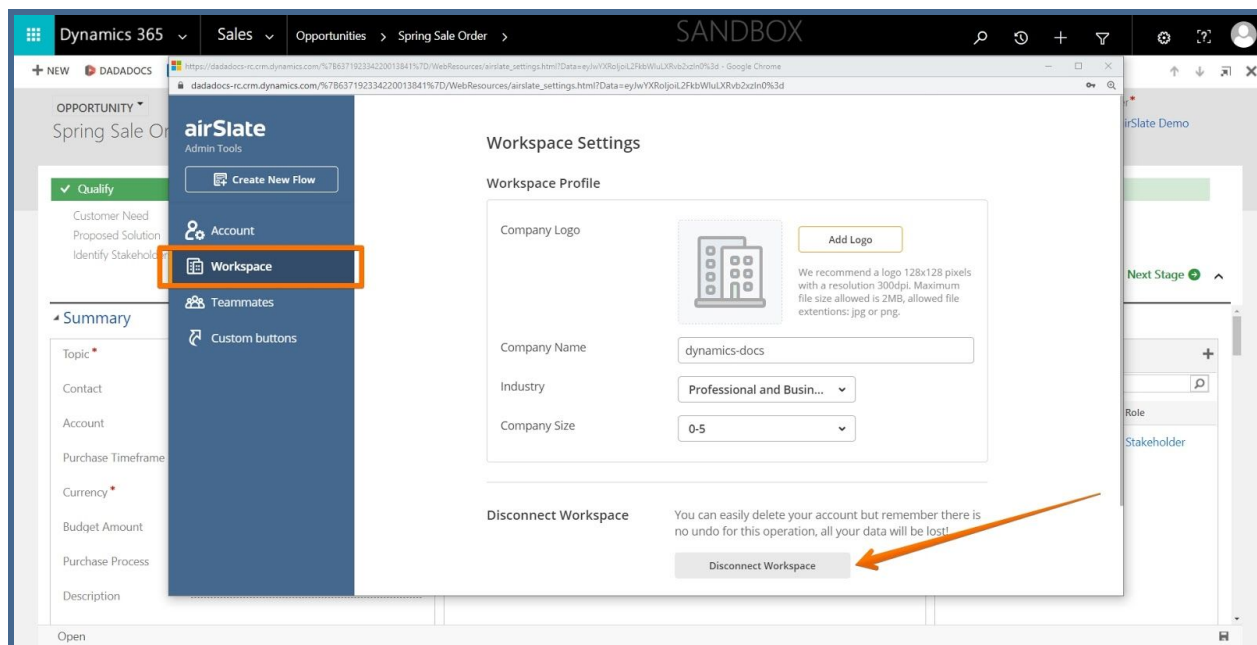
When you log in, the Account settings page opens. Feel free to change the account settings any time you want to.



Workspace

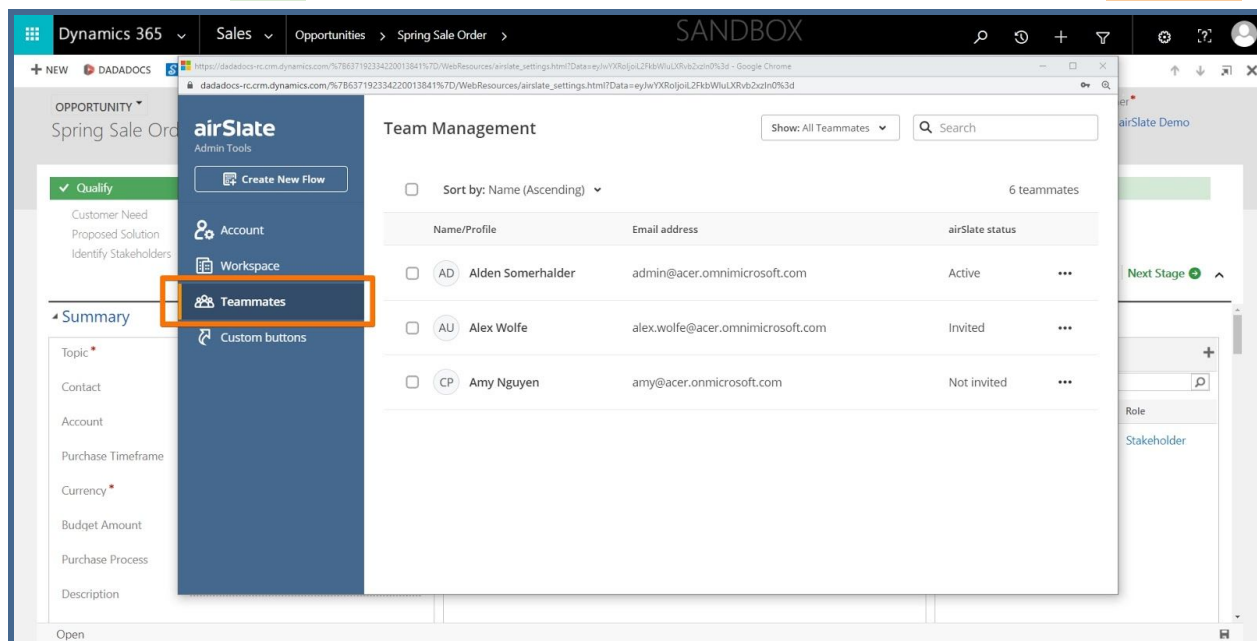
Select or create an airSlate Workspace that you'd like to work with. Keep in mind that you should have airSlate Admin rights for the workspace to create Flows or add Teammates.



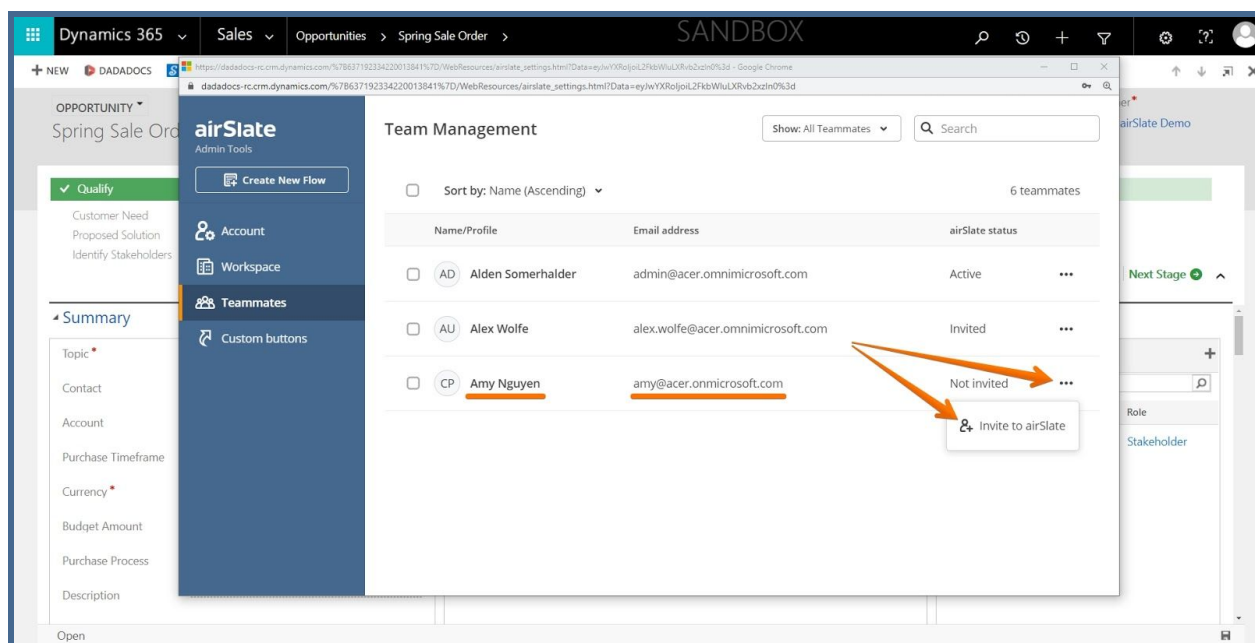


Teammates

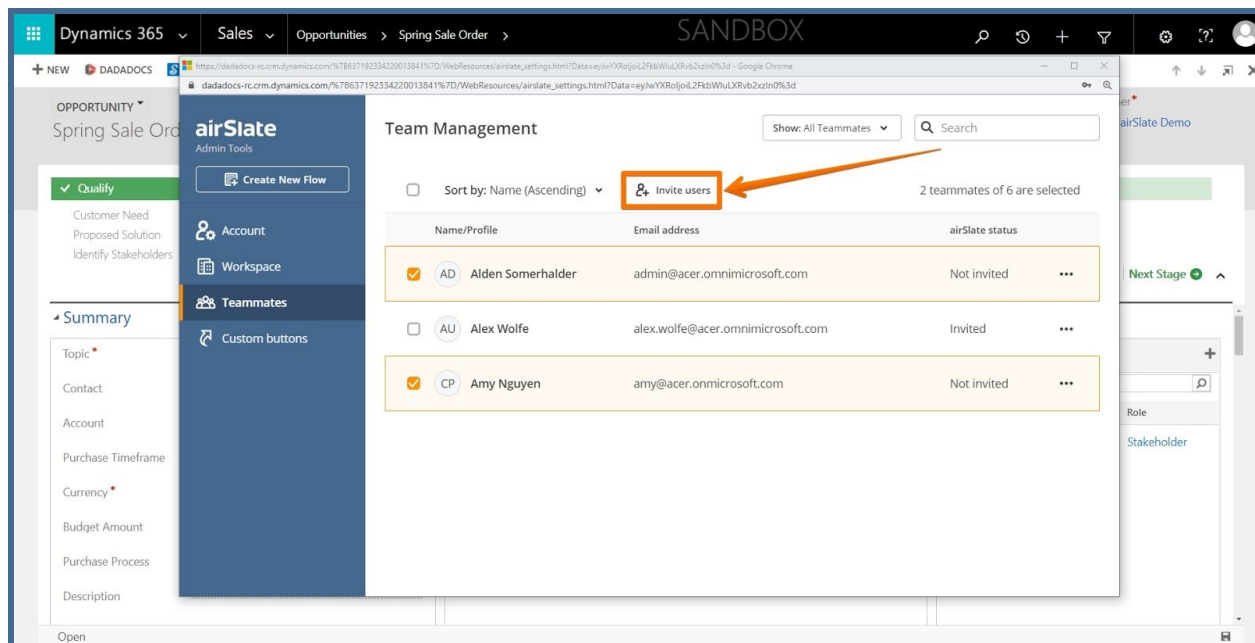
In this section, invite any member of your MS Dynamics 365 organization to your airSlate Workspace. The full list of your MS Dynamics 365 teammates is available by default. Next to every team member there is **airSlate status**: *invited* (teammates who have been invited to the Workspace), *active* (teammates who have already joined your Workspace), or *not invited*.



To invite an MS Dynamics 365 user, click on the actions menu (trriage) next to their airSlate status.



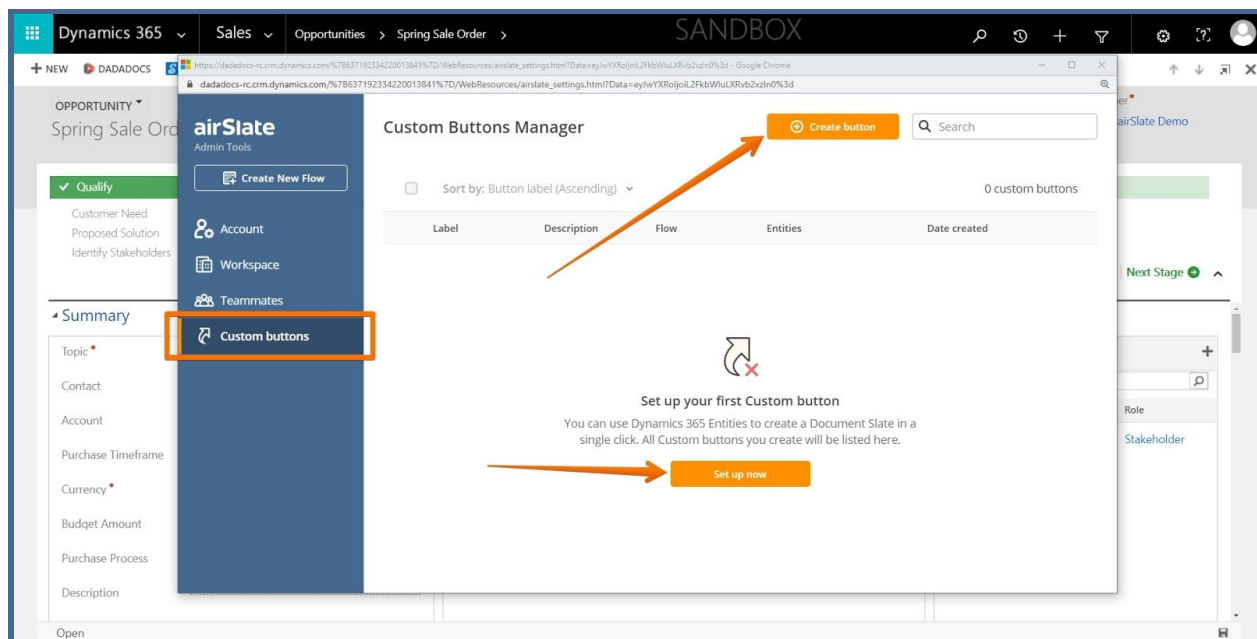
To invite several MS Dynamics 365 users at the same time, check the boxes next to each name and then click **Invite users**. The Invite users button becomes available only after you select at least one teammate for this operation.



Custom buttons

In the Custom buttons section, add custom buttons to MS Dynamics 365 entities and set them up to run specific airSlate Flows.

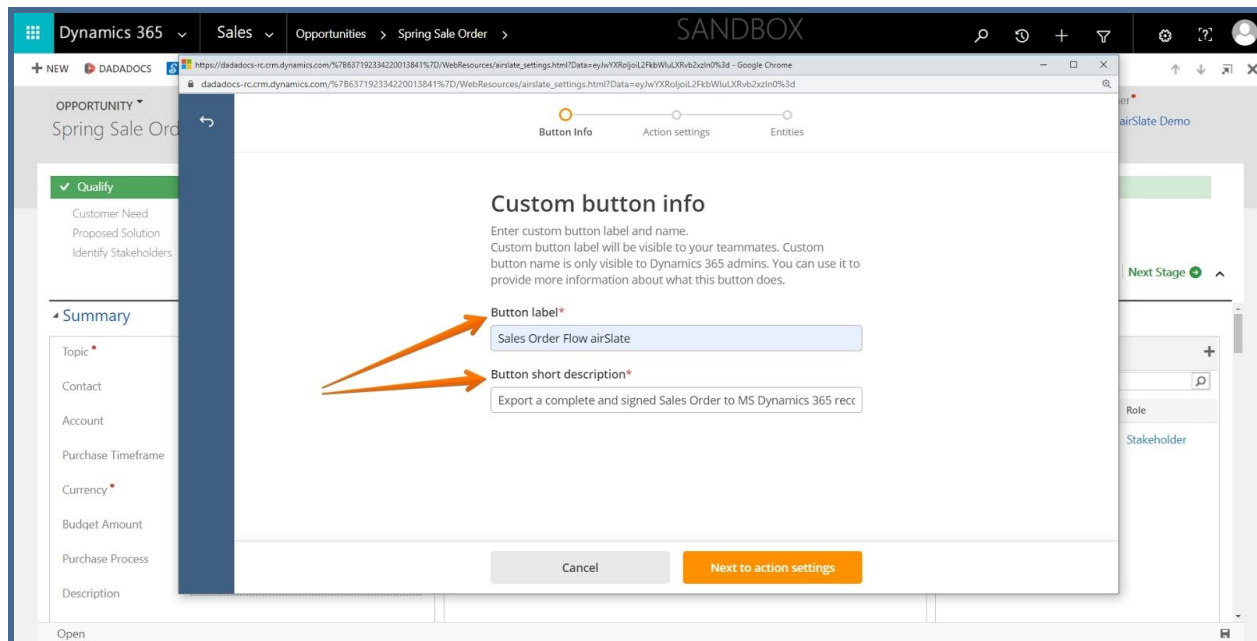
Begin by clicking **Create button** or **Set up now**.



Enter the custom button label and short description.

Custom button label will be visible to your teammates. Button short description is only visible to Dynamics 365 admins. You can use it to provide more information about what this button does.

When you're done, click **Next to Action settings**.

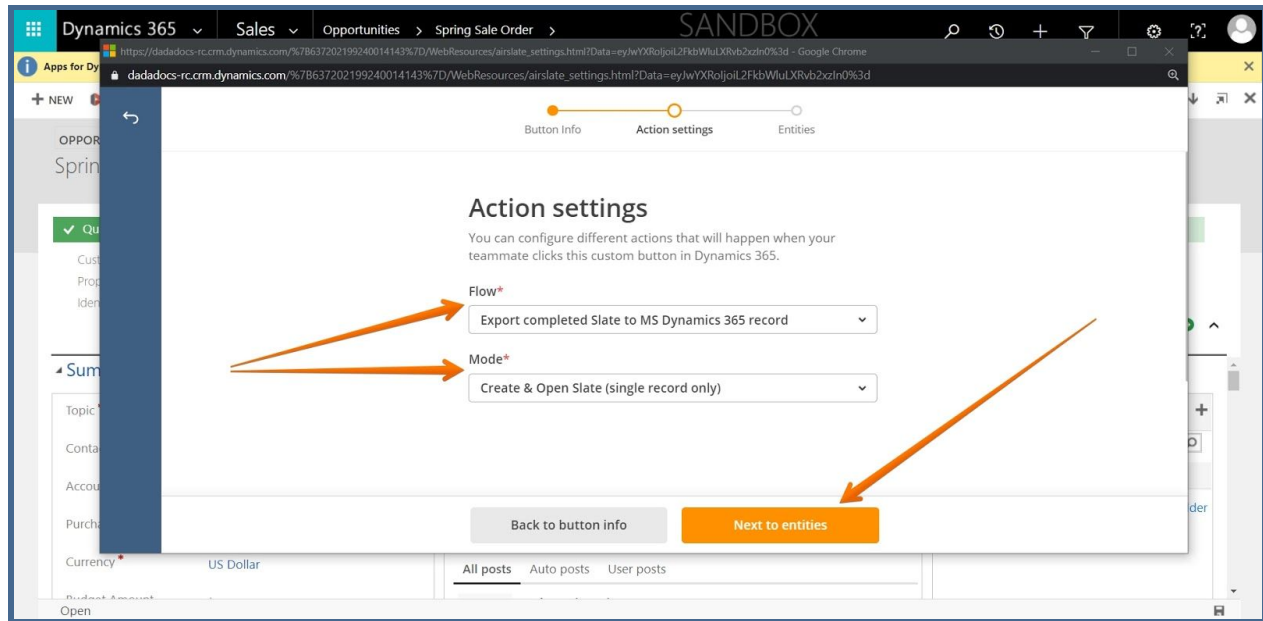


In *Action settings*, select which Flow will be triggered by this button and the mode it will be running in. Remember, you can select only between the Flows in the Workspace you connected previously.

In the Mode dropdown select:

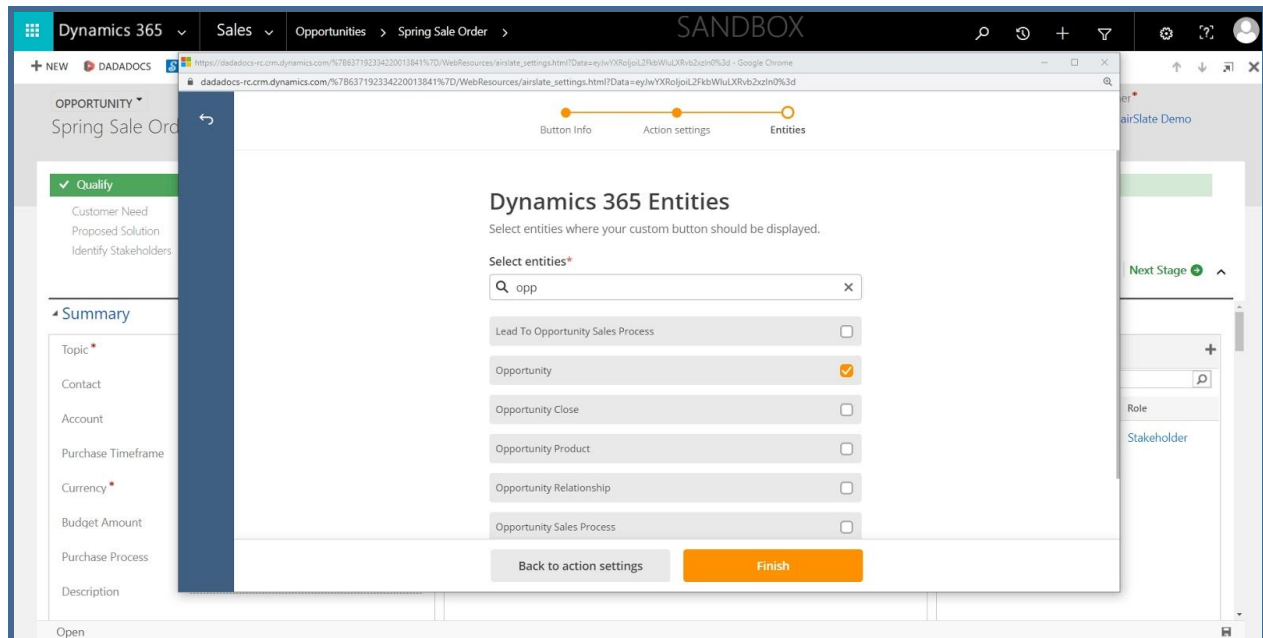
- Create and Open Slate (Single record only)
- Create Slate

When you're done, click **Next to entities**.

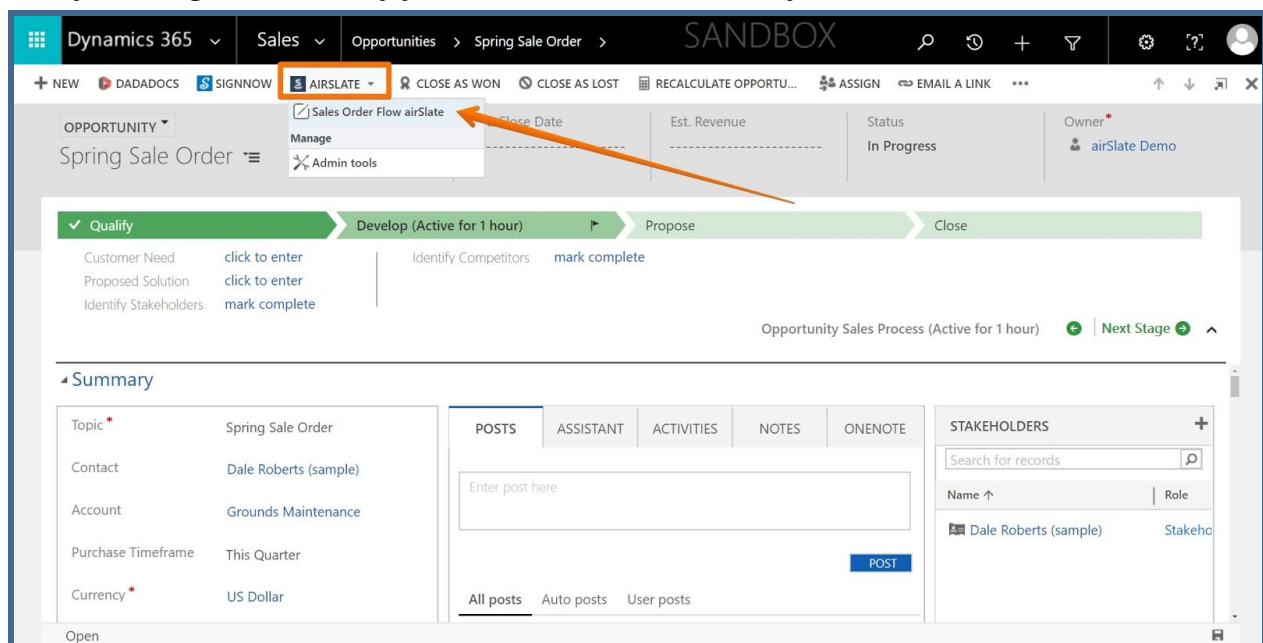


In *Entities*, select the MS Dynamics 365 entities where you'd like to use this button.

When you're done, click **Finish**.



Now you can go to the entity you've selected and check if you can test this button.



Before you begin: basic airSlate Flow settings

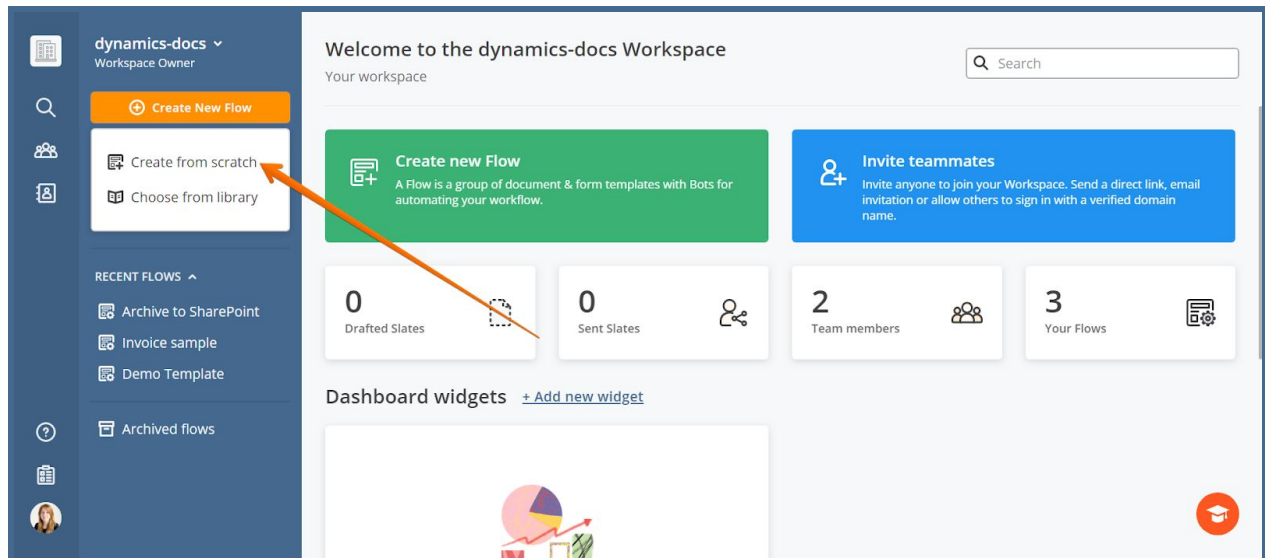
In this article you'll learn how to create automation Flows in airSlate and integrate them with MS Dynamics 365.

Every Flow consists of three stages:

- **Create Flow:** add documents, templates, HTML forms you'd like to work with. This would be the basis for your Flow. When you upload or select a document, add fillable fields and roles (access privileges) to it;
- **Setup Bots:** add a bot (software robot) that executes one atomic operation with your document. Select a bot from the airSlate Bot Library. At this stage you can find one of the bots that integrate your Flow into MS Dynamics 365;
- **Distribute Flow:** specify how you'd like to use your Flow, when recipients should access it, and then make it public.

Create Flow

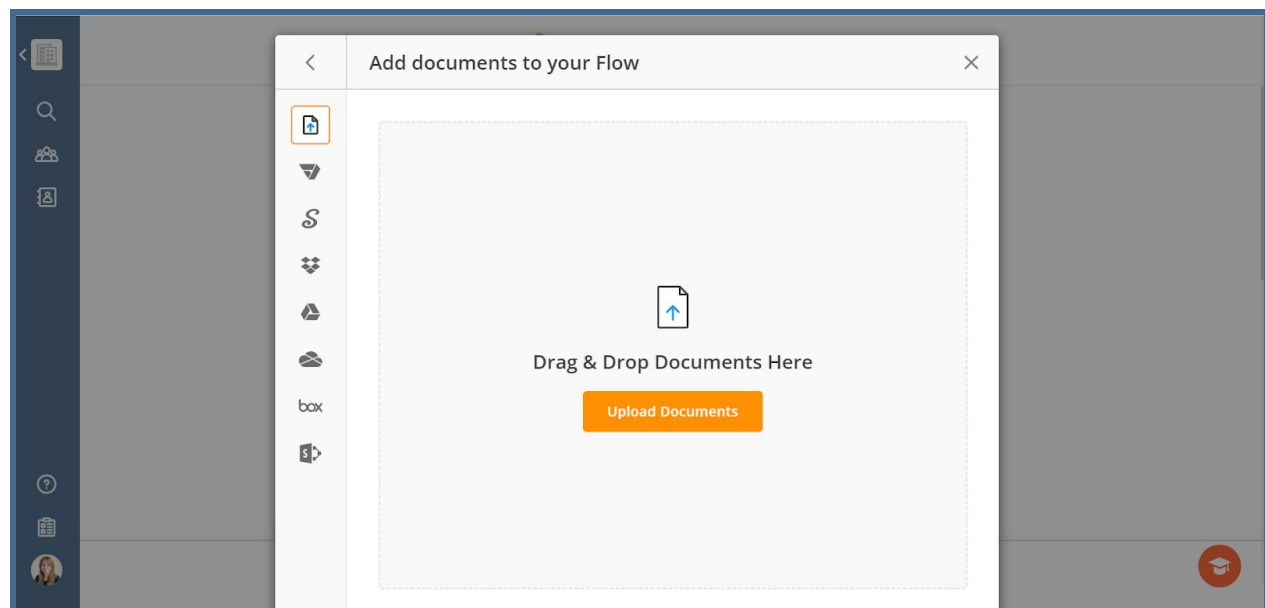
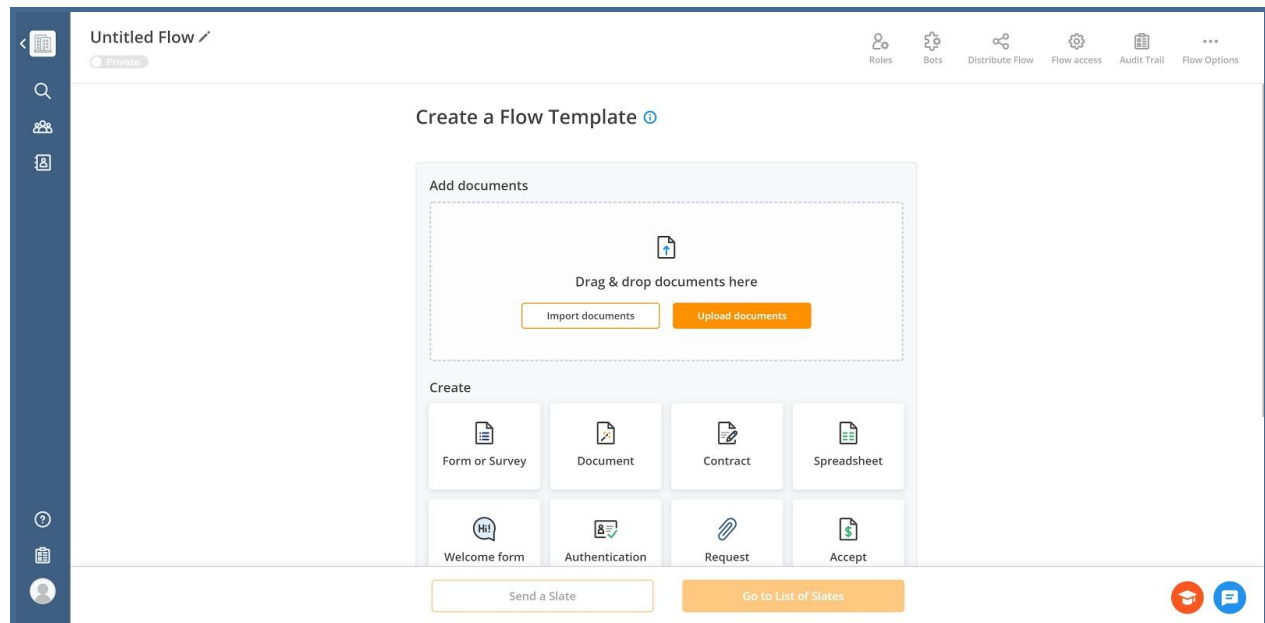
1. Create a new Flow.



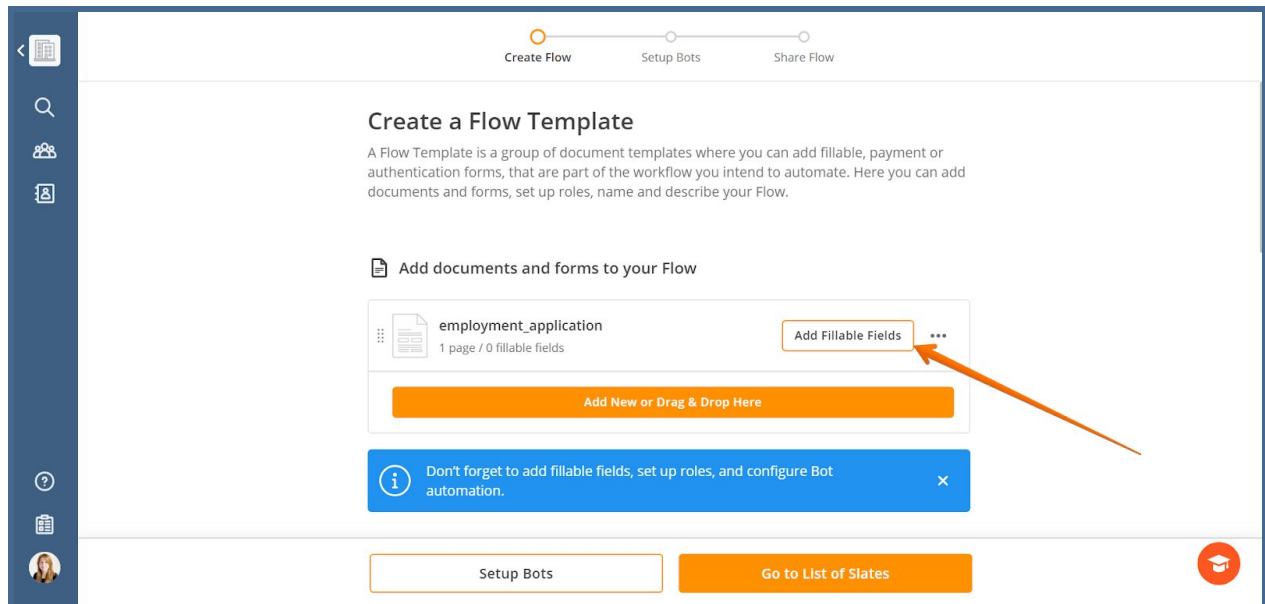
2. Name the flow and add the document to it.

Let's use an employment application for this example. There are three different options to add a document to your Flow.

- *Import documents*: add files from another application, CRM, or storage (PDFfiller, signNow, Dropbox, Google Drive, OneDrive, Box, SharePoint)
- *Upload documents*: upload or simply drag and drop files from your device
- *Create*: use one of the popular templates to create your document

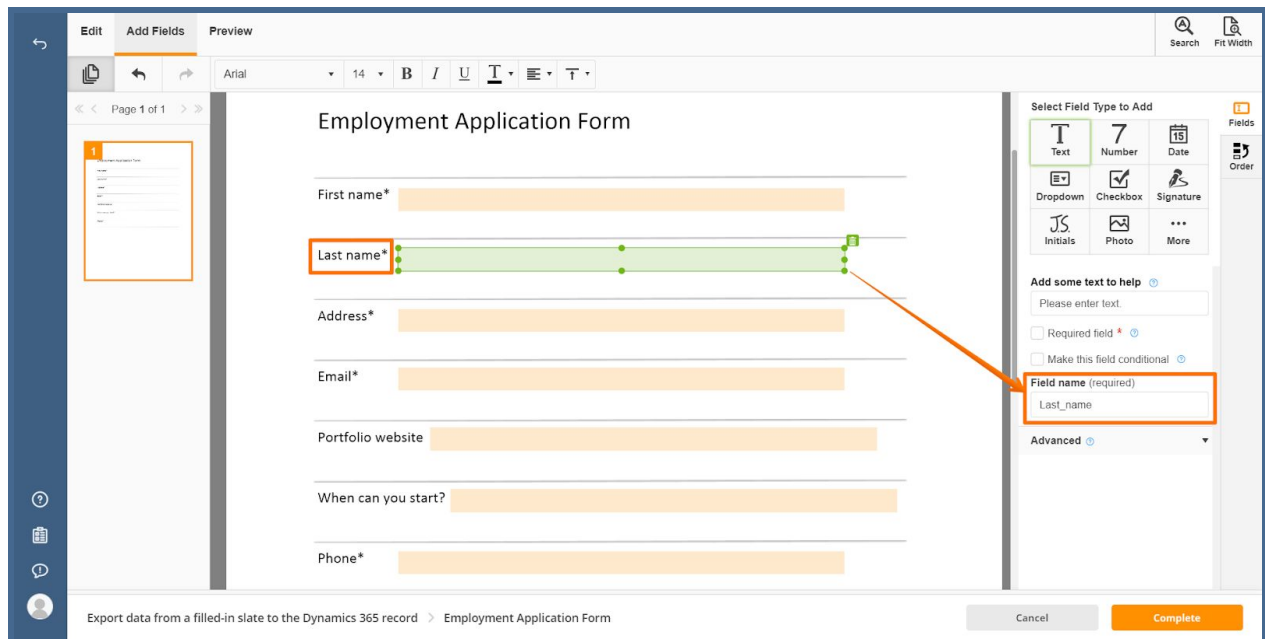


3. Add fillable fields to your document.



Tip: When you add fillable fields, it's more convenient to name each field. This makes it a lot easier to match them with the record fields later.

In this example, every field is named after the question line:



Click **Complete** in the bottom right when you're done with fillable fields.

Roles

Create and assign roles to documents and forms in a Flow template. You can assign roles to fillable fields of certain documents as well as grant access permissions.

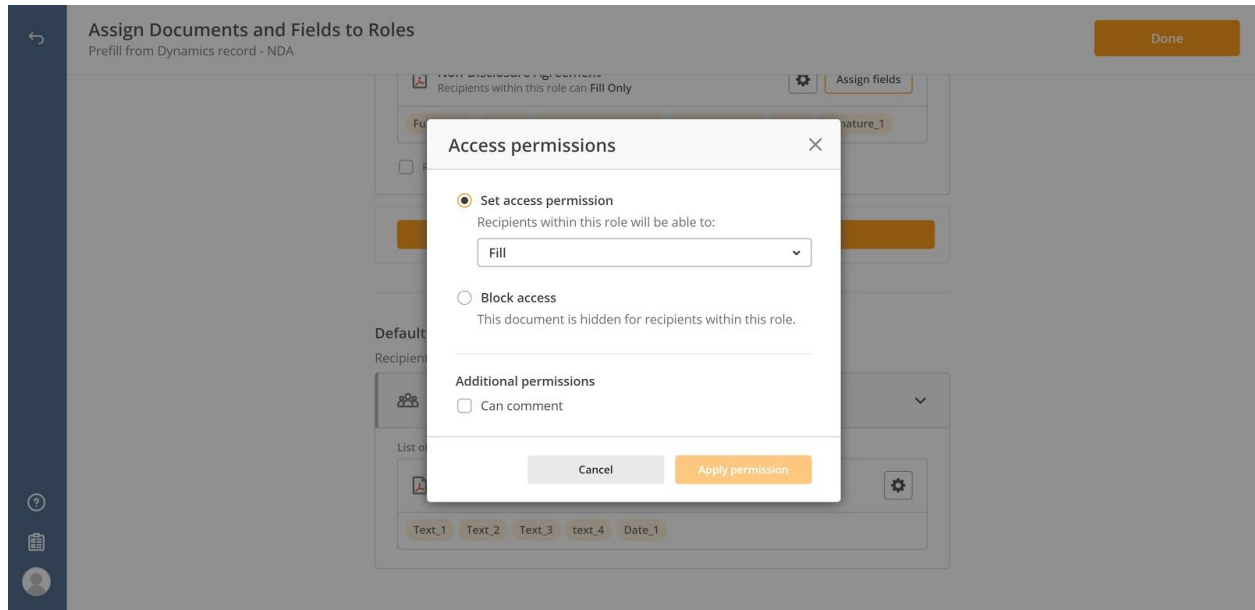
By default, any recipient you share a Flow with will be able to fill out and comment on documents attached.

Choose specific access permissions for each document and add fillable fields to this role.

- Under the role name, click **Assign fields** to select fillable fields for this role. Recipients under this role will be able to act on these fields depending on the set role access permission.
- Assign access permissions and fillable fields to the other documents the same way.
- Click **Create new role** to set as many roles as you need.

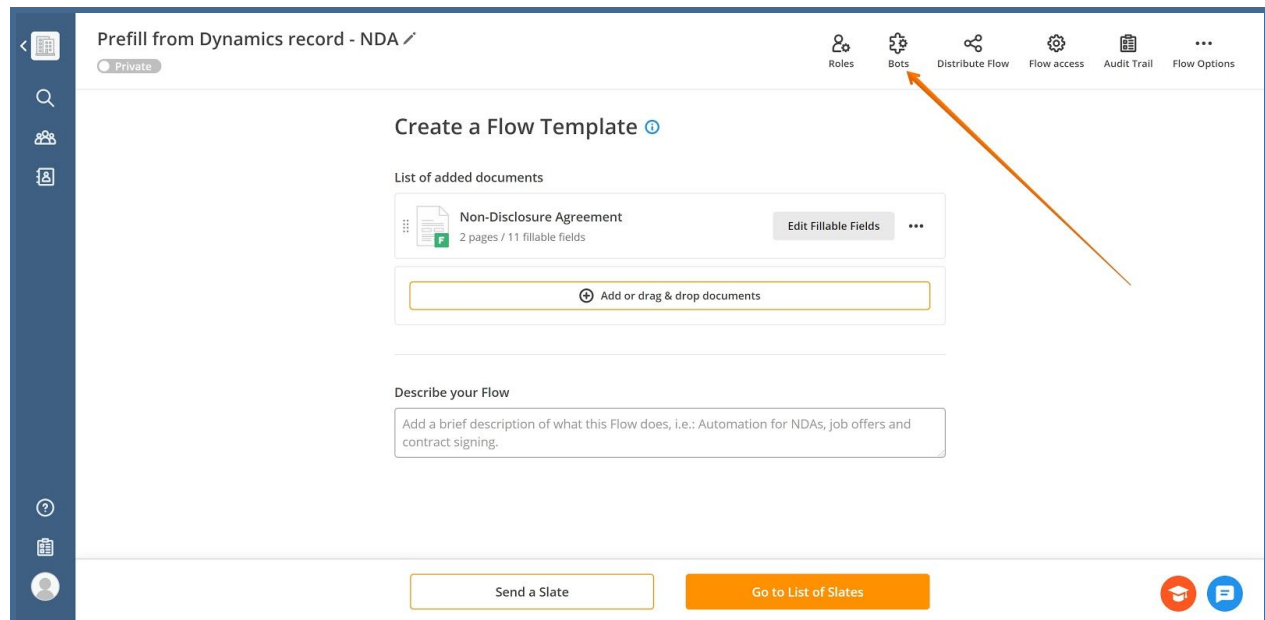
The screenshot shows the 'Assign Documents and Fields to Roles' interface. At the top, there's a title bar with a back arrow, the title 'Assign Documents and Fields to Roles', a subtitle 'Prefill from Dynamics record - NDA', and a 'Done' button. The main content area is divided into two sections: 'Flow roles' and 'Default access'. The 'Flow roles' section has a heading 'Flow roles' and a subheading 'Create roles and assign fillable fields and access permissions.' Below this, there's a role card for 'Signer' with a trash icon and a dropdown arrow. Under the role card, there's a 'List of documents in Flow Template' section. It contains a document card for 'Non-Disclosure Agreement' with a subtitle 'Recipients within this role can Fill Only'. This card has a gear icon and an 'Assign fields' button. Below the document card, there's a list of fields: 'Full_name', 'Date_2', 'Name_receiving_party', 'phone_number', 'email', and 'Signature_1'. There's also a checkbox labeled 'Revoke access when completed'. Below the document list, there's a 'Create new role' button. The 'Default access' section has a heading 'Default access' and a subheading 'Recipients without a role may fill out the following unassigned fields.' Below this, there's a card for 'Default access. Anyone can fill out these document fields' with a subtitle '5 fields in 1 document' and a dropdown arrow. On the left side of the interface, there's a vertical sidebar with icons for help, a calendar, and a user profile.

- In Default access, click the gear button to set access permissions for this document (Fill (default), or Read (only viewing the document)). Check **Block access** to hide the fields for this role; check **Can comment** to allow recipients comment on the Slate.

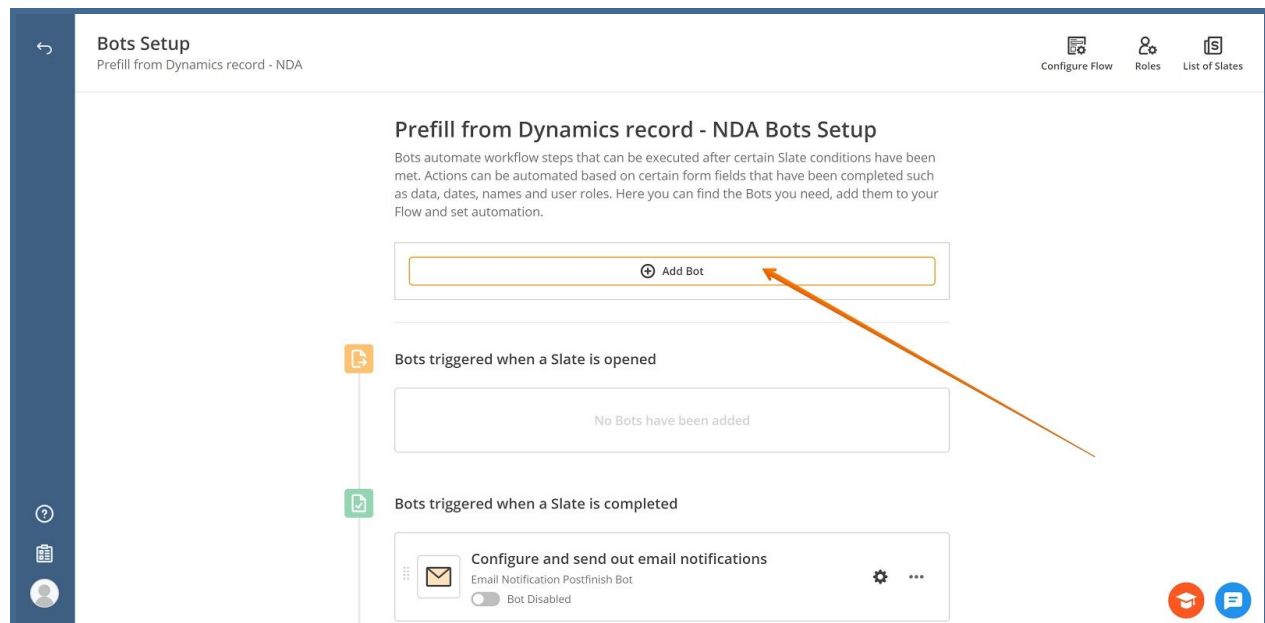


Setup Bots: Find & Install an MS Dynamics 365 Bot

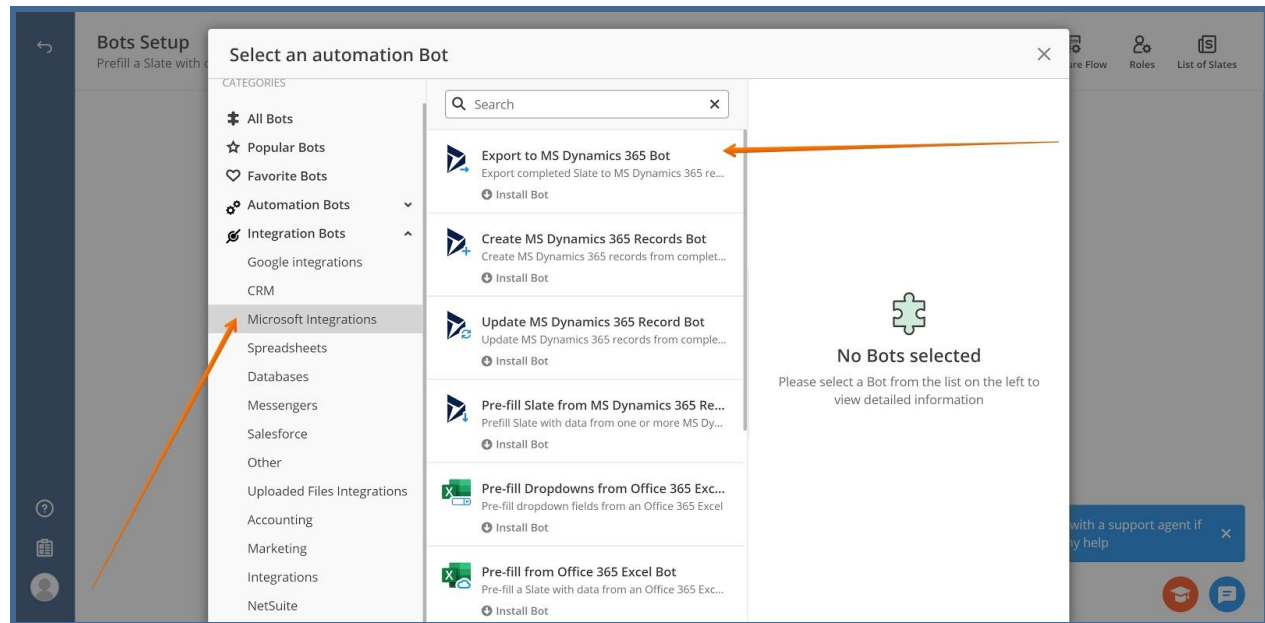
1. Go to **Bots**.



2. Click **Add Bot** on the Bots Setup page.



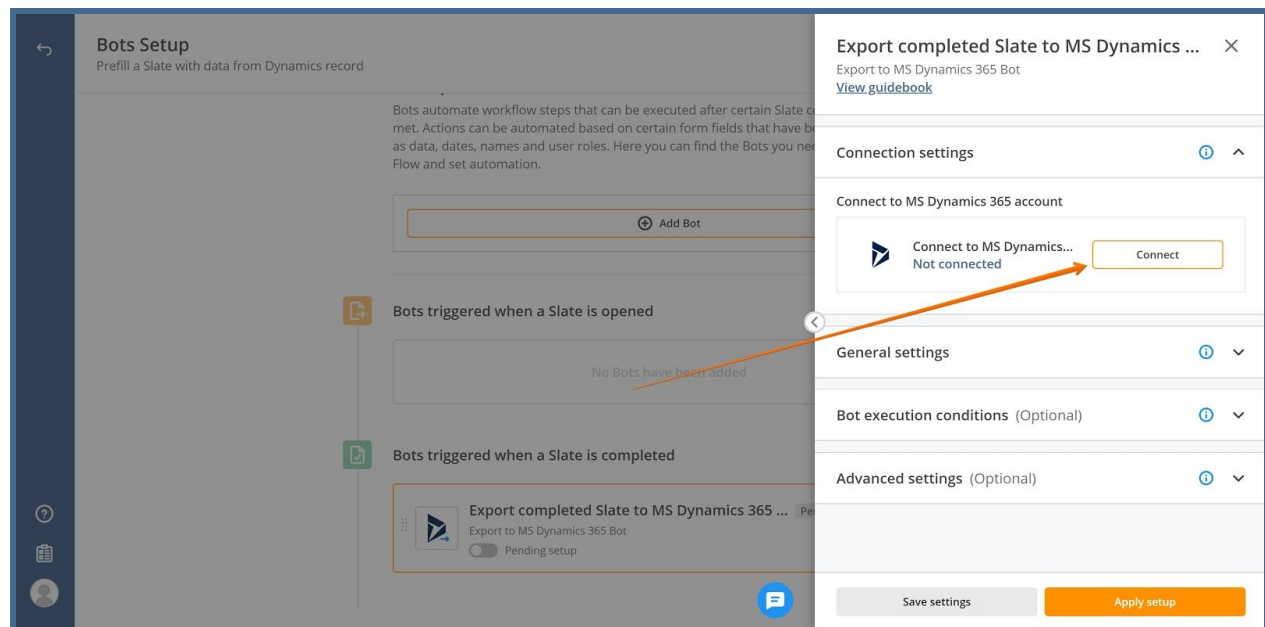
3. Go to Microsoft Integrations and select the Bot that you need.



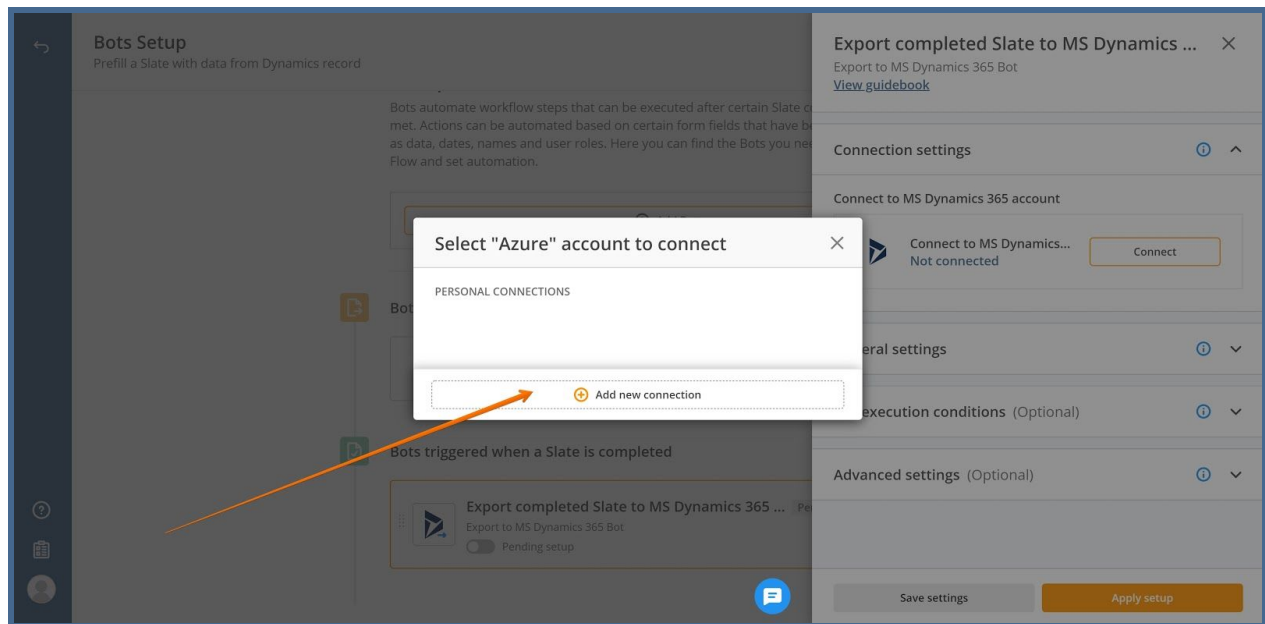
Click **Install Bot** to add it to the Flow.

Setup Bots: Connection Settings

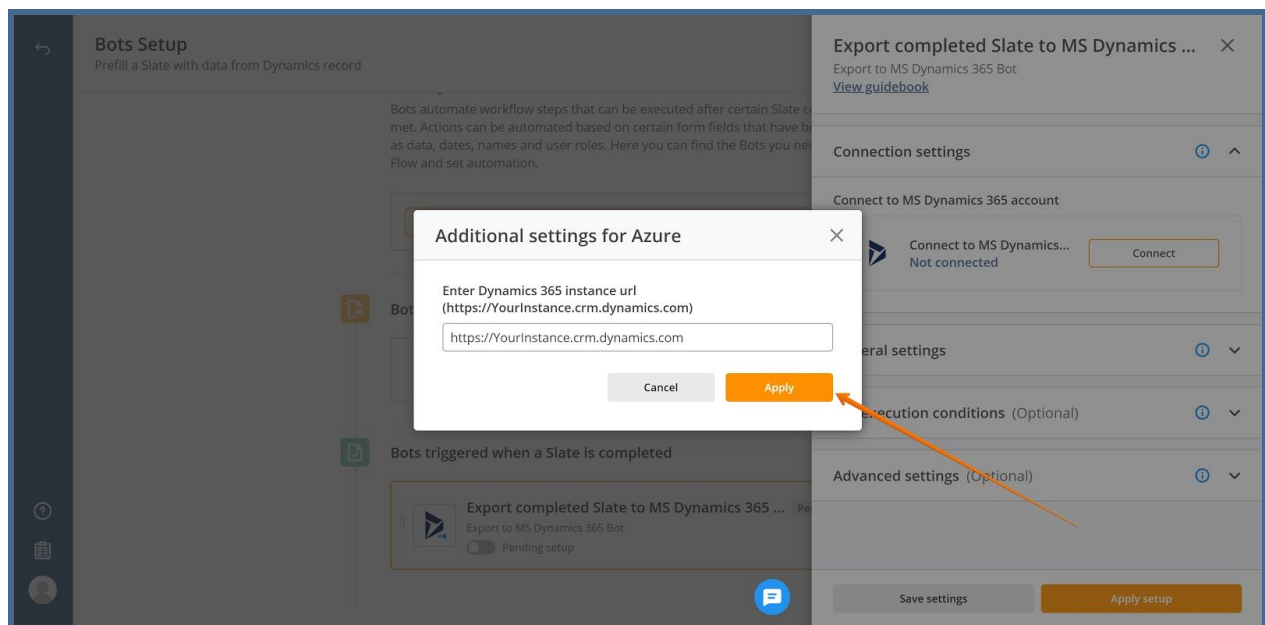
Connect your MS Dynamics 365 account:



Click **Add new connection**.

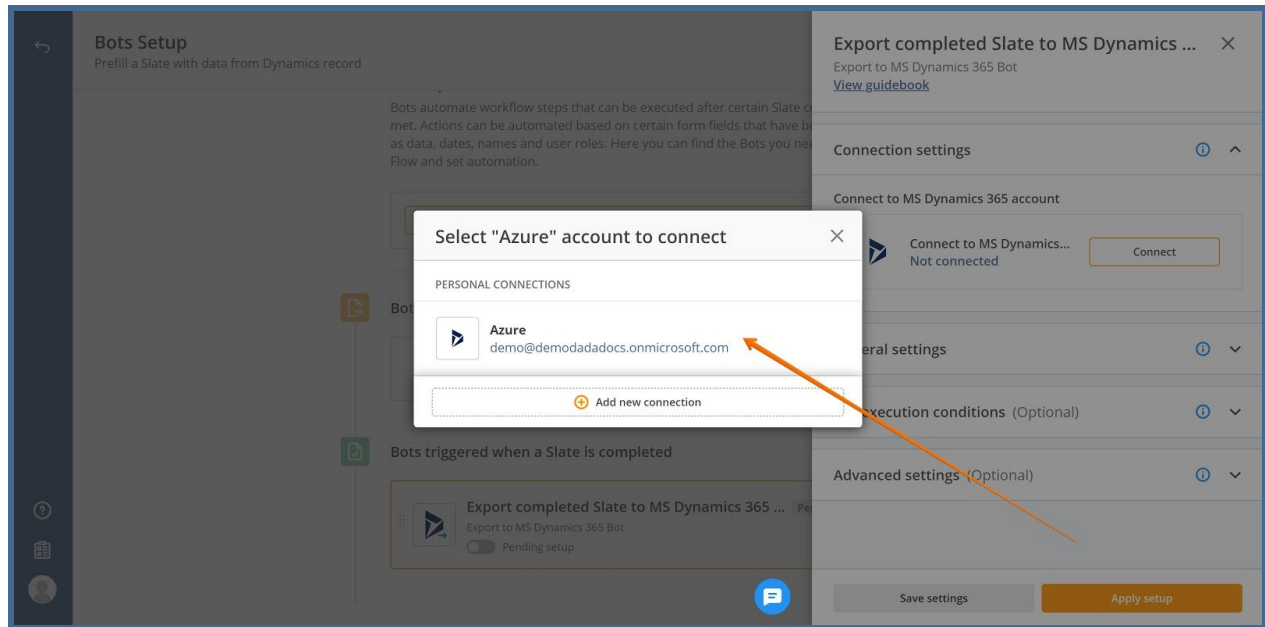


Insert your MS Dynamics 365 instance URL and click **Apply**.



Microsoft Login Page opens. Sign in to your account. After that you'll be redirected back to airSlate. The account you picked appears as your connection.

Also, you can simply pick an account you've connected previously.



Setup Bots: General Settings - Find a record

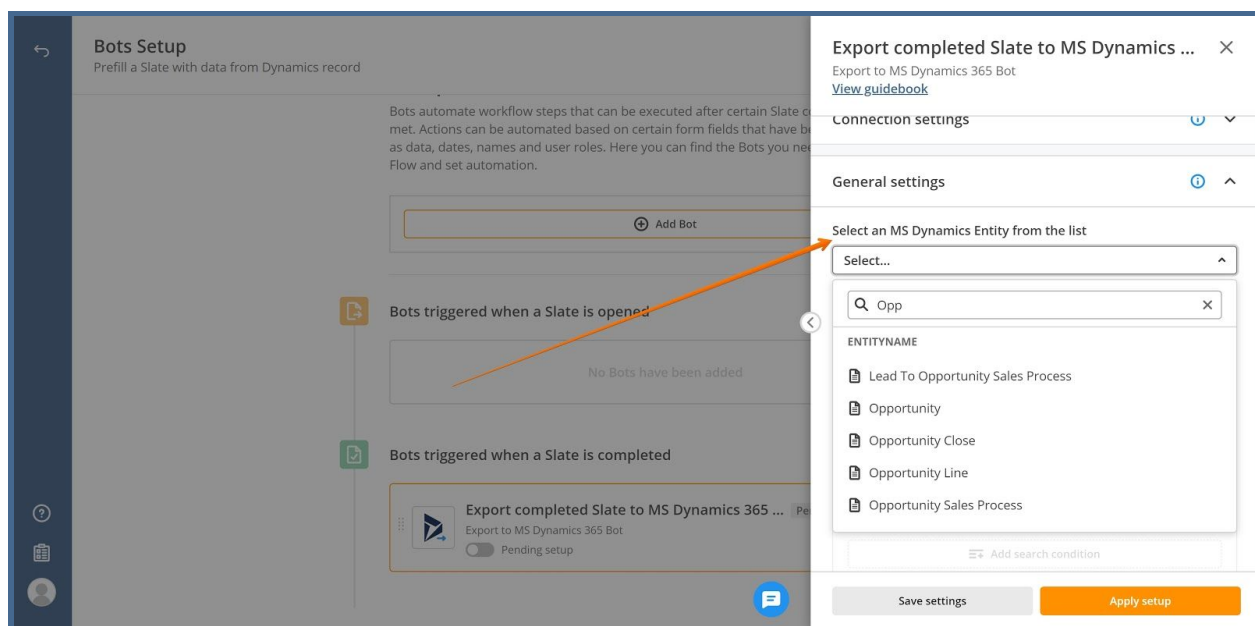
airSlate needs to identify what MS Dynamics 365 record should be used in your Flow. The identification is automated via two steps. First, you specify what MS Dynamics 365 entity to look for. Second, you set up what document fields and entity fields must contain identical values. In airSlate, they are called *search fields*.

airSlate bots check up on the *search fields*. The operation is successful if they find only one matching record based on the search fields. If there's more, add as many *search fields* as it takes to identify the record.

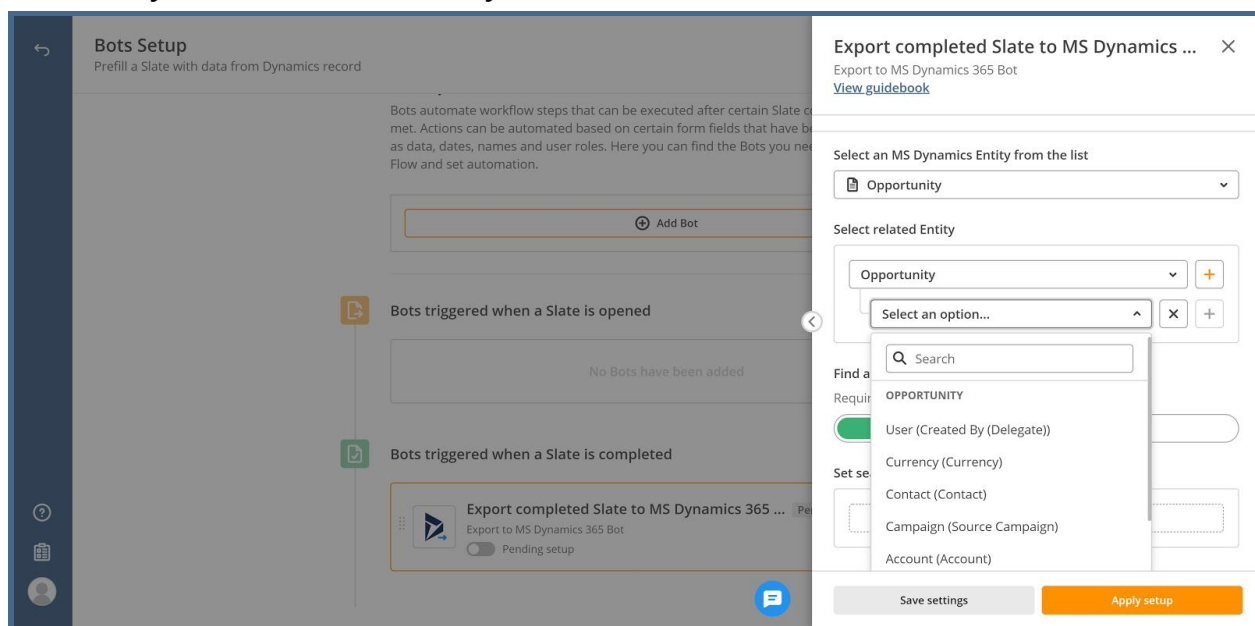
1. Select the MS Dynamics 365 entity*.

All entities are listed in the dropdown for your convenience.

* Contacts, Cases, Accounts, Leads, Opportunities, Activities, etc. are all **entities** which hold data **records**.



If necessary, select the related Entity as well.



2. Identify the MS Dynamics 365 record for your Flow in Find a record.

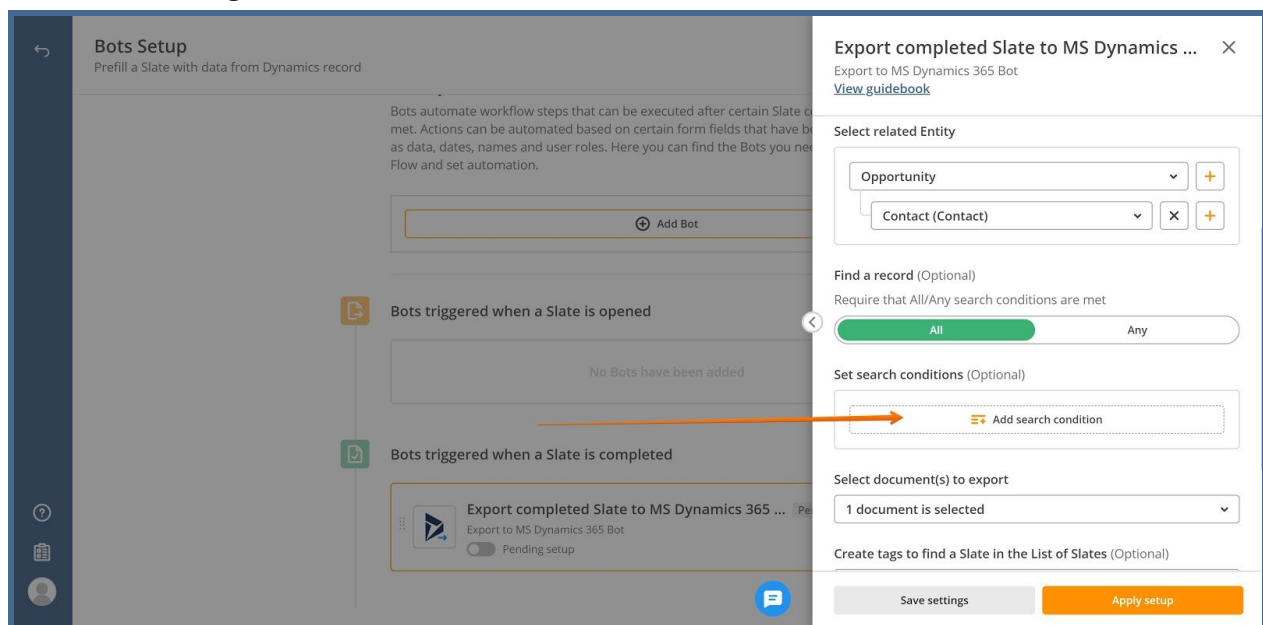
Select what values identify this record (i.e. account number, company name) and match them between the record and the document.

This allows bots to compare values in the document with the record values and use the results to establish where exactly you'd like to upload the complete slate, for example. If the account number is the same in the document and in the record, the bot identifies this record as correct and attaches the document to it.

Tip: For successful identification it's better to use the values which are unlikely to change, like the account number, company name, SSN, EIN etc.

Select entity fields which should contain these values and link them to the fillable fields which should contain the same values in the document.

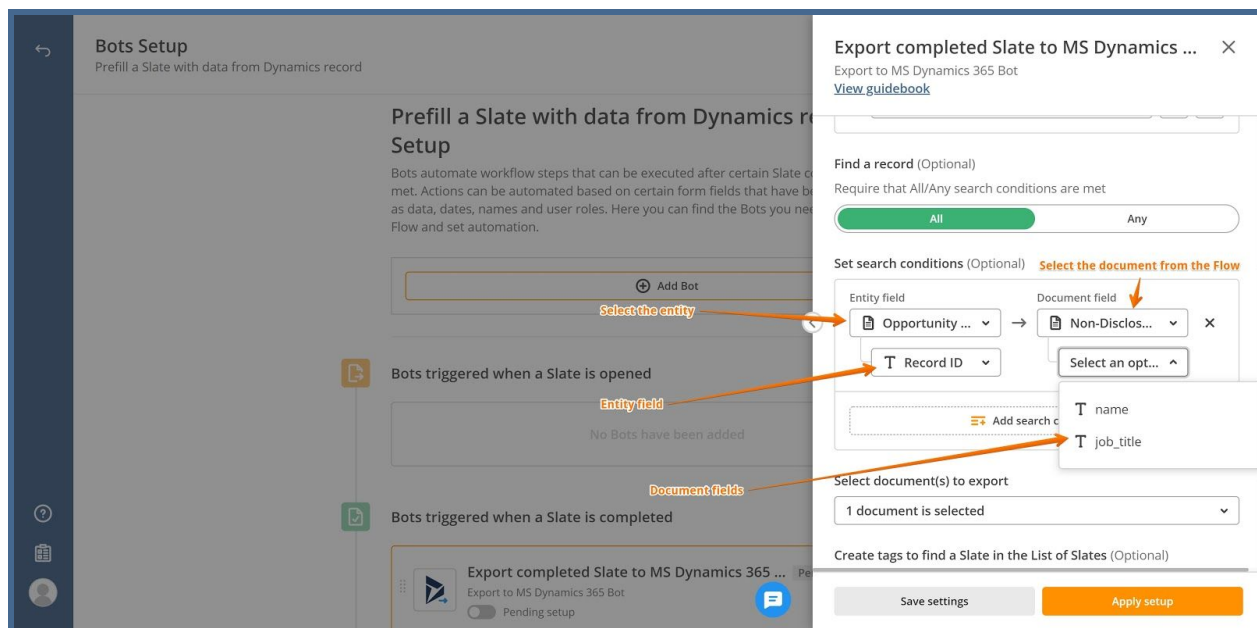
Start with clicking the **Add search condition**.



Select the **Entity field** from the dropdown, then select the **Document field** from the other dropdown under the name of your document.

In Entity field, first, specify which entity contains the field. Next - the list of all the fields in the entity becomes available in the dropdown below.

In Document field, select the name of your document in the Flow - and all document fields become available in the dropdown below.

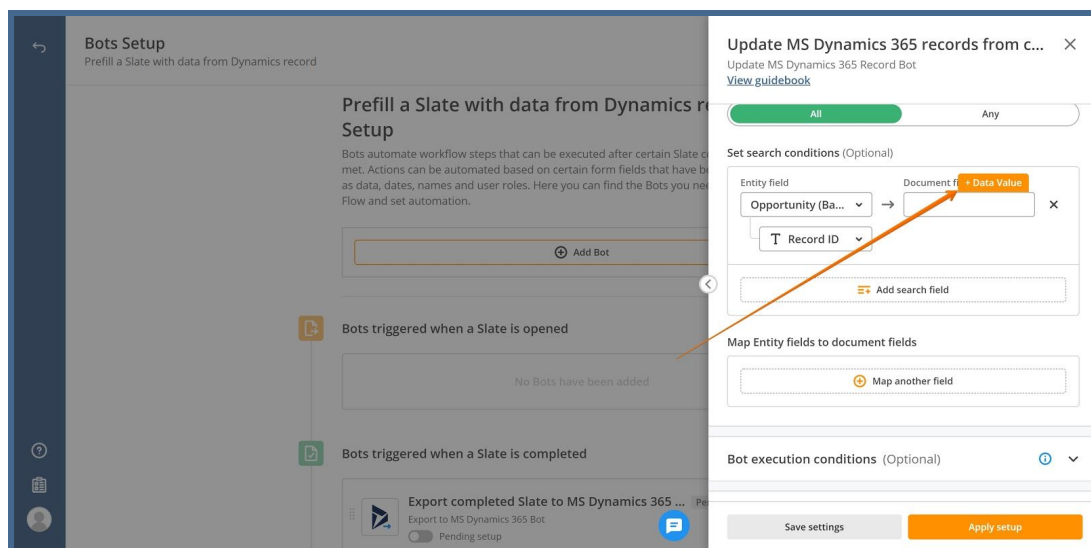


Feel free to add as many identifying fields as you want. To do so, just click **Add search condition** and repeat the matching.

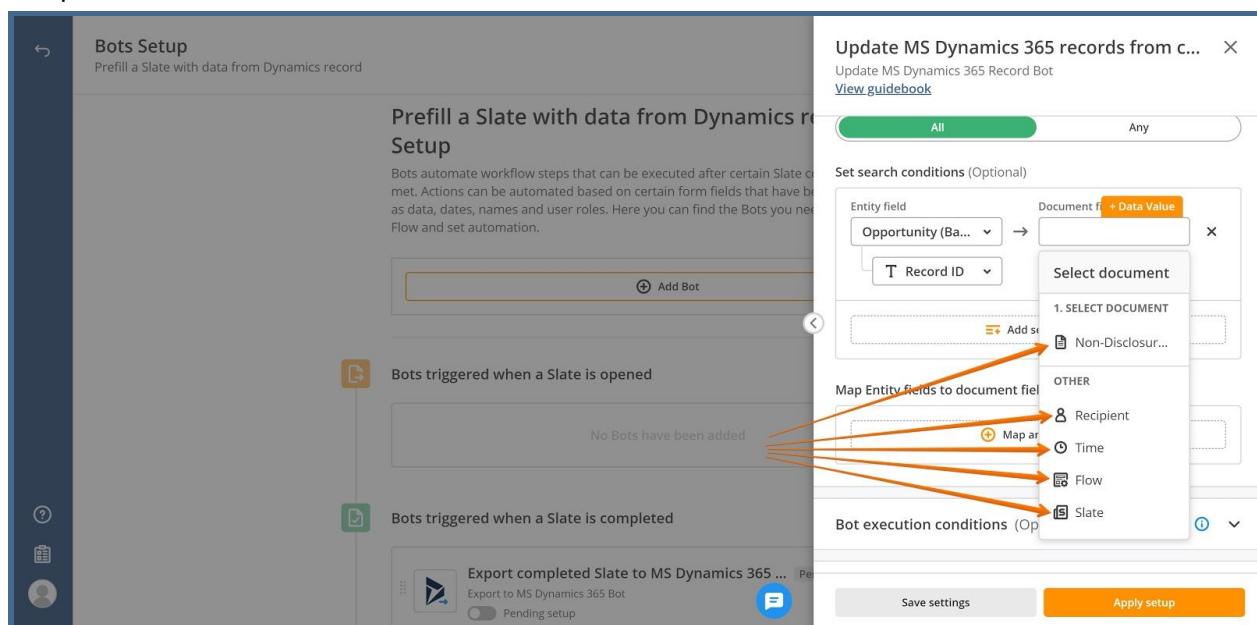
Note: if the lookup finds more than one matching record, none of the records can be used to run the Flow.

Some bots allow you to identify a record based on some values from the airSlate Flow, like the Recipient's Name or Email.

Click in the Document field and select **+Data Value**.



Select the name of the document to go to document fields, or use one of the other options: Recipient, Time, Flow, or Slate.



- Recipient: identifies the record by the recipient's name or email address
- Time: identifies the record by the time of bot execution
- Flow: identifies the record by the airSlate Flow
- Slate: identifies the record by Slate revision

Setup Bots: General Settings - Mapping

Some Bots extract data from the documents and update fields in MS Dynamics 365 records, some do exactly the opposite: extract data from the record and put it in the document. It requires to set up which document field carries the information and which record field it goes to (or the other way around). In airSlate this process is called *Mapping*.

Map the record fields with fillable fields in the document.

This allows airSlate bots to transfer data from the document into a record (and vice versa) correctly.

Select record fields and link them to the fillable fields which should contain the corresponding values in the document.

Remember to map all the required MS Dynamics 365 entity fields, otherwise MS Dynamics 365 won't let you create or update a new record. The required fields are marked by a star symbol in every record.

Dynamics 365 | Sales | Opportunities > Spring sale order >

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+ NEW DADADOCs SIGNNOW AIRSLATE CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTUNITY... ASSIGN EMAIL A LINK ...

OPPORTUNITY
Spring sale order

Est. Close Date Est. Revenue Status In Progress Owner airSlate Demo

Qualify (Active for 63 days, 16 hours) Develop Propose Close

- Identify Contact Robert Lockett (sample)
- Identify Account Grounds Maintenance (sample)
- Purchase Timeframe
- Estimated Budget \$12,000.00
- Purchase Process click to enter
- Identify Decision Ma... mark complete
- Capture Summary click to enter

Opportunity Sales Process (Active for 63 days, 16 hours) Next Stage

Summary

Topic Spring sale order

Contact Robert Lockett (sample)

Account Grounds Maintenance (sample)

Purchase Timeframe

Currency US Dollar

Budget Amount \$12,000.00

Purchase Process

POSTS ASSISTANT ACTIVITIES NOTES ONENOTE

Enter post here

POST

All posts Auto posts User posts

Spring sale order
Opportunity Created by airSlate Demo for Account Grounds Maintenance (sample).
On Spring sale order's wall
3/10/2020 4:38 PM

Stakeholders

Search for records

Name Role

Robert Lockett (sample) Stakeholder

Start with clicking **Map another field**.

Bots Setup
Prefill a Slate with data from Dynamics record

Prefill a Slate with data from Dynamics record Setup

Bots automate workflow steps that can be executed after certain Slate or document is met. Actions can be automated based on certain form fields that have been populated with data, dates, names and user roles. Here you can find the Bots you need to set up and set automation.

Bots triggered when a Slate is opened

No Bots have been added

Bots triggered when a Slate is completed

Export completed Slate to MS Dynamics 365 ...
Export to MS Dynamics 365 Bot
Pending setup

Update MS Dynamics 365 records from c...

Update MS Dynamics 365 Record Bot
[View guidebook](#)

Set search conditions (Optional)

Entity field: Opportunity (Ba...
Document field: Non-Disclosure Agreements
Record ID

Map Entity fields to document fields

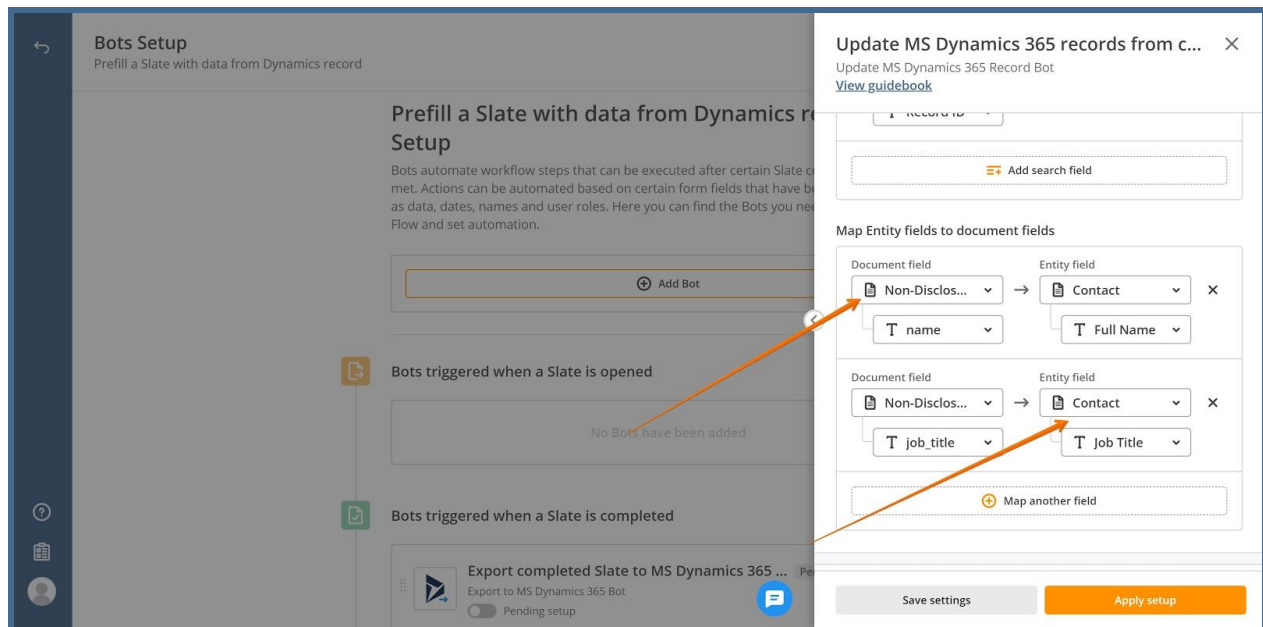
Map another field

Bot execution conditions (Optional)

Advanced settings (Optional)

Save settings Apply setup

Select the **Document field** to transfer value from, then select the **Entity field** to transfer value into (or the other way around for Pre-fill bots).



Repeat the mapping for every field.

Click **Apply setup** when you're done.

Distribute Flow

Make your Flow public to use it and share.

Click **Configure Flow** to leave the Bots Setup page, and then select **Distribute Flow** in Flow editing.

The image displays two screenshots of the airSlate interface for MS Dynamics 365.

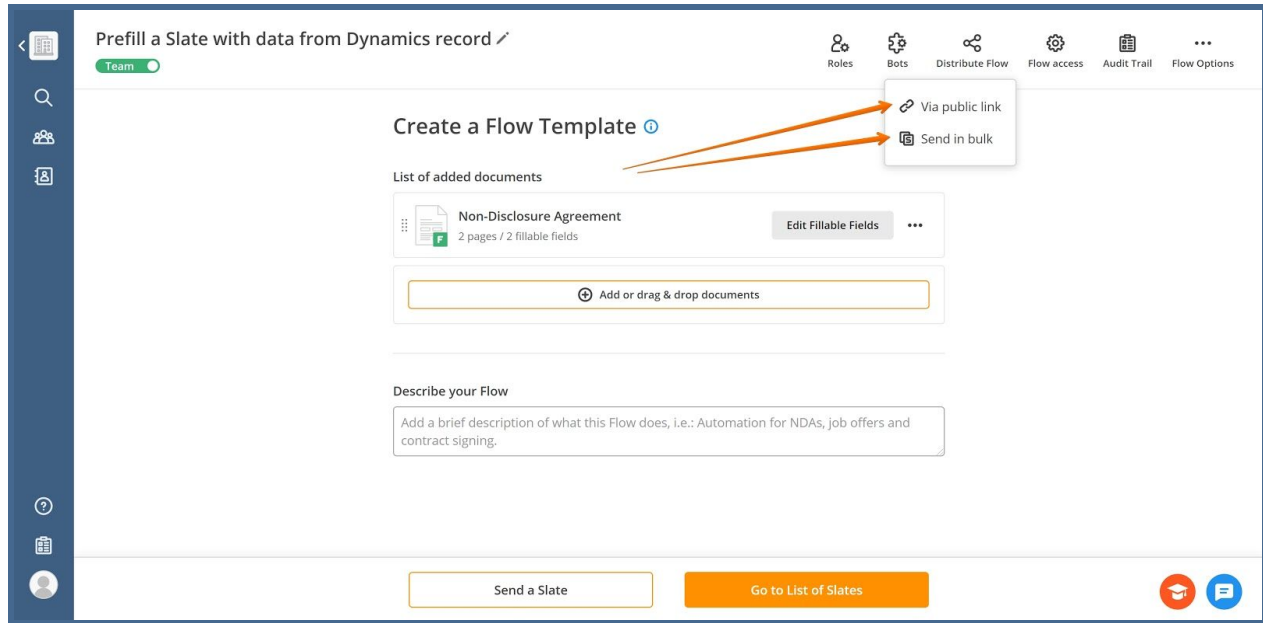
Top Screenshot: Bots Setup

- Page Title:** Bots Setup
- Subtitle:** Prefill a Slate with data from Dynamics record
- Top Right Navigation:** Configure Flow (highlighted with an orange arrow), Roles, List of Slates.
- Main Content:**
 - Prefill a Slate with data from Dynamics record Bots Setup**
 - Bots automate workflow steps that can be executed after certain Slate conditions have been met. Actions can be automated based on certain form fields that have been completed such as data, dates, names and user roles. Here you can find the Bots you need, add them to your Flow and set automation.**
 - Add Bot** button.
 - Bots triggered when a Slate is opened:** No Bots have been added.
 - Bots triggered when a Slate is completed:** Export completed Slate to MS Dynamics 365 ... Pending. Export to MS Dynamics 365 Bot. Pending setup.
- Bottom Right:** Red and blue circular icons.

Bottom Screenshot: Create a Flow Template

- Page Title:** Prefill a Slate with data from Dynamics record
- Subtitle:** Team
- Top Right Navigation:** Roles, Bots, Distribute Flow (highlighted with an orange arrow), Flow access, Audit Trail, Flow Options.
- Main Content:**
 - Create a Flow Template**
 - List of added documents:** Non-Disclosure Agreement (2 pages / 2 fillable fields). Edit Fillable Fields button.
 - Add or drag & drop documents** button.
 - Describe your Flow:** Add a brief description of what this Flow does, i.e.: Automation for NDAs, job offers and contract signing.
- Bottom:** Send a Slate button, Go to List of Slates button.
- Bottom Right:** Red and blue circular icons.

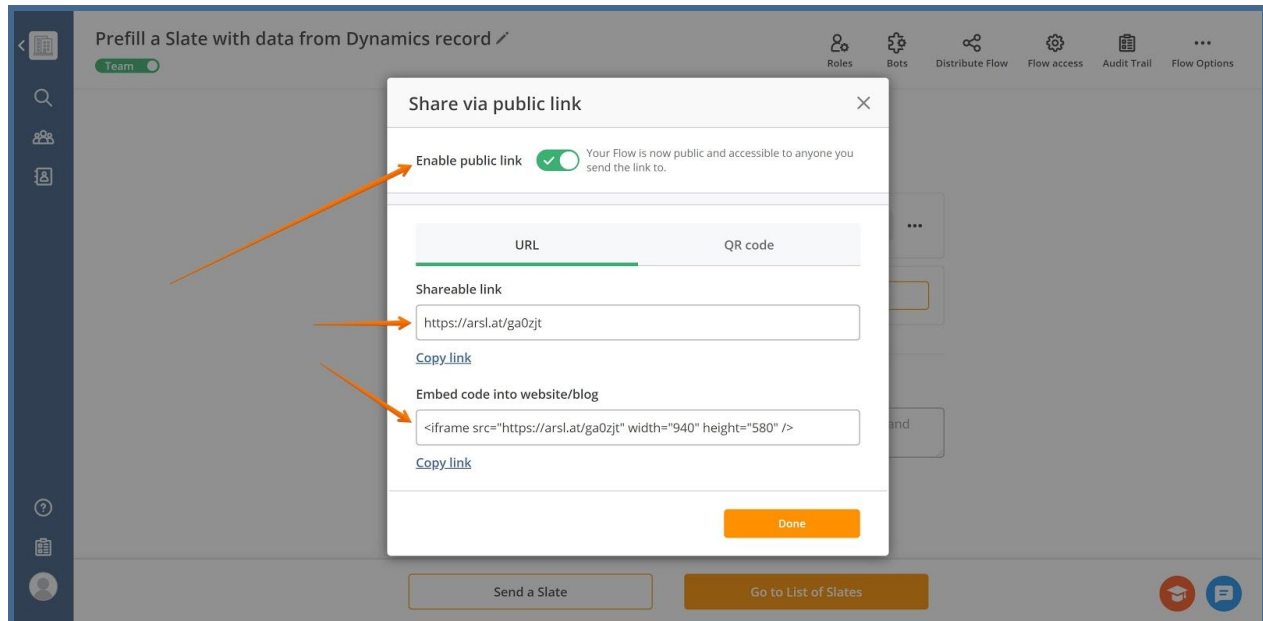
Select one of the options: **Via public link** or **Send in bulk**.

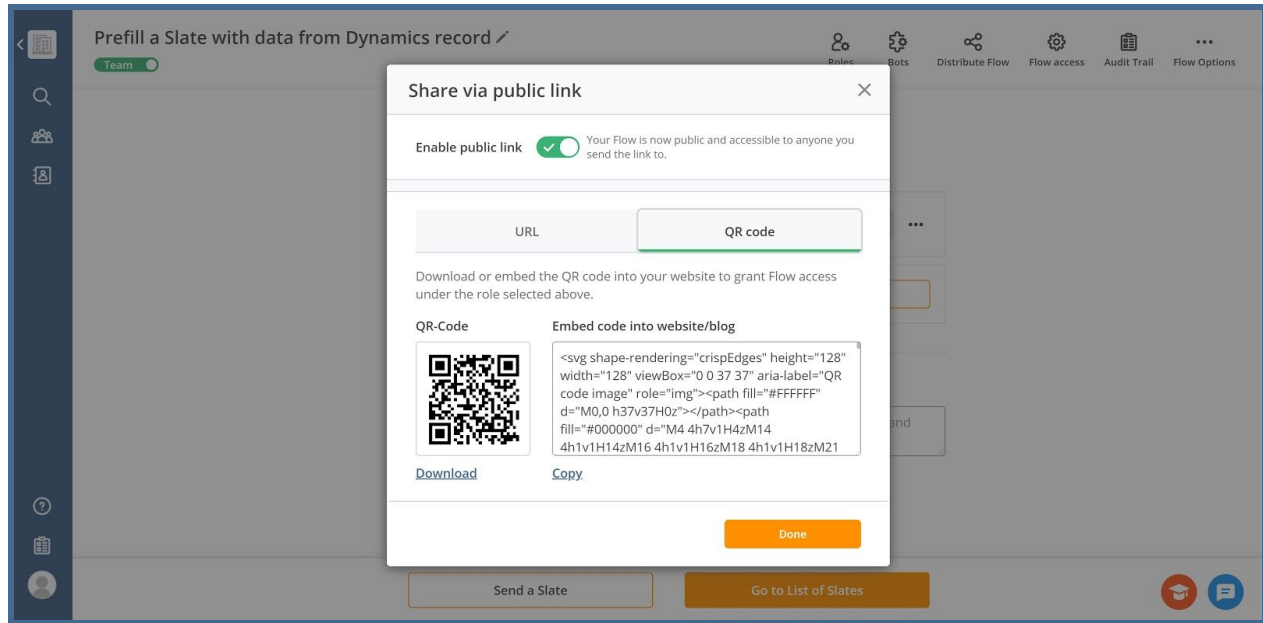


Via public link

- *Enable public link*: switch the toggle to make the link available for sharing
- *Shareable link*: copy the link to share the Flow
- *Embed code into website/blog*: copy the link to share it on your web resource
- *QR code*: download the QR code image or copy the code to embed it into your web resource

Click **Done** when you're ready.













Send in bulk

Bulk sending enables you to send Slates to multiple recipients at once depending on the assigned roles and signing order.

- *Generate a .csv template* - download the Flow template which contains all the Roles in the Flow. Fill in the template's columns by adding a recipient's email to every role your Flow has. You can add one email per role and multiple emails to the Fill freely role.
- *Upload the .csv template and send Slates* - After you've finished assigning recipients to roles, upload the .csv file back to airSlate and select a signing order if applicable. Once sent, every valid email on the list will receive Slates depending on the role and signing order selected.
- *Customize messaging to users* - edit the subject and email body for every recipient of the Slate, add Field values to customize messages - type in the field IDs in curly braces.







Send Slates in Bulk

Prefill a Slate with data from Dynamics record

Bulk sending enables you to send Slates to multiple recipients at once depending on the assigned roles and set signing order.

Step 1. Generate a .csv template

To assign recipients to a role, begin by downloading the .csv template containing the list of roles associated with your Flow. Fill in the template's columns by adding a recipient's email to every role your Flow has. You can add one email per role and multiple emails to the Fill freely role.

Download CSV template

The Flow template has 0 roles



Step 2. Upload the .csv template and send Slates




After you've finished assigning recipients to roles, upload the .csv file back to airSlate and select a signing order if applicable. Once sent, every valid email on the list will receive Slates depending on the role and signing order selected.




Upload CSV file

Back to List of Slates

Send in Bulk







Step 2. Upload the .csv template and send Slates

After you've finished assigning recipients to roles, upload the .csv file back to airSlate and select a signing order if applicable. Once sent, every valid email on the list will receive Slates depending on the role and signing order selected.

Upload CSV file

Step 3. Customize messaging to users

Subject

You've received a new Document Slate to fill out.

Message + Field value

Hi {user_name}, {sender_name} has sent you the {flow_name} to fill out.

Locate Slates in seconds by specifying the tags you would like to add to them

Enter your tag here

Back to List of Slates

Send in Bulk

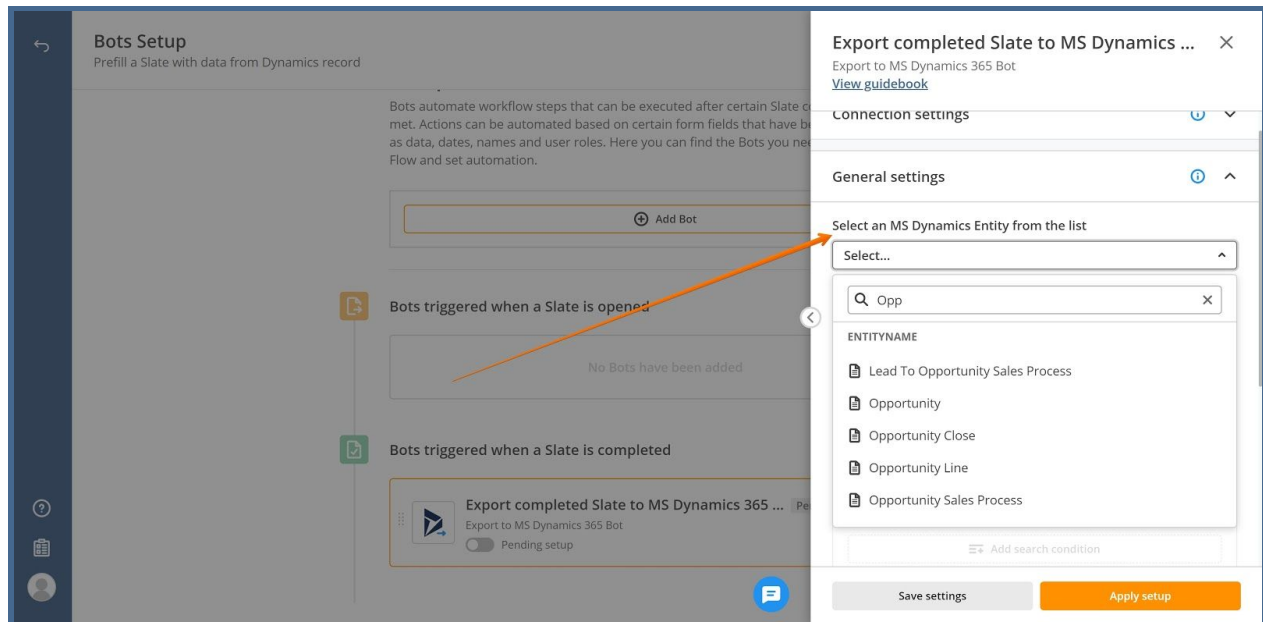
Click **Send in Bulk** when you're done.

Export a completed slate to the Dynamics 365 record

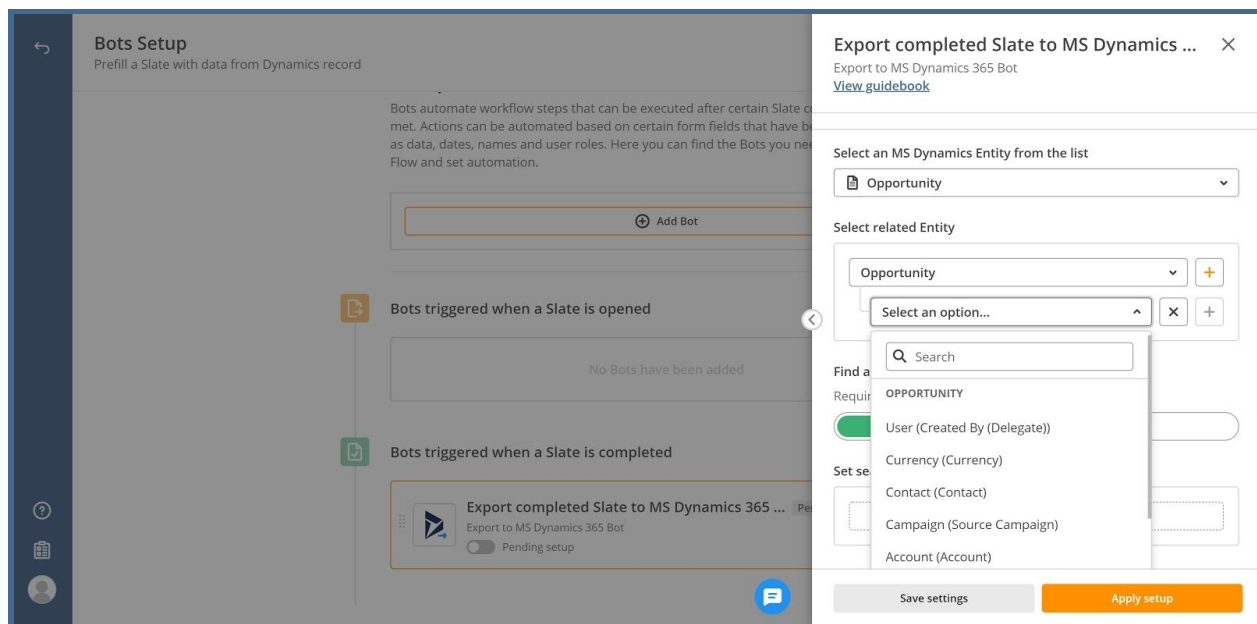
Leverage the Export to MS Dynamics 365 record bot to automatically upload a completed slate as a PDF attachment to the MS Dynamics 365 record. Automate collecting documents and save them consistently to the same specific record in MS Dynamics 365.

1. Install Export completed Slate to MS Dynamics 365 record Bot from the airSlate library as described in *Setup Bots: Find & Install an MS Dynamics 365 bot*.
2. Connect your MS Dynamics 365 account as described in *Setup Bots: Connection settings*.
3. Select the MS Dynamics 365 entity where the complete slate goes.

All entities are listed in the dropdown for your convenience.



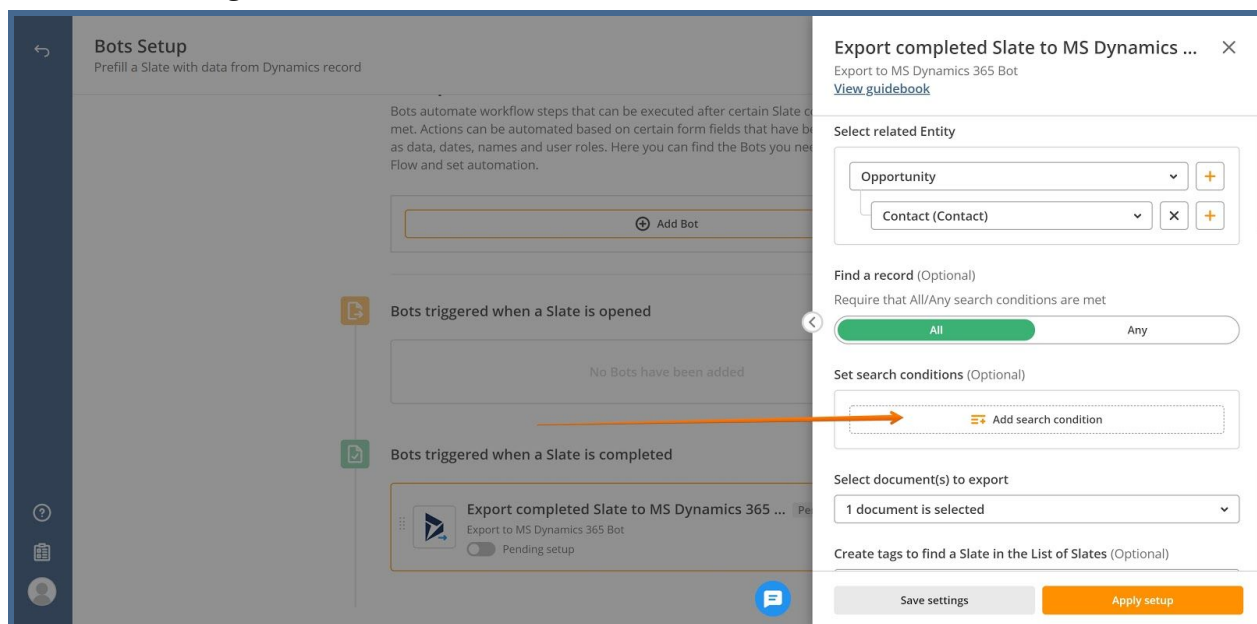
If necessary, select the related Entity as well.



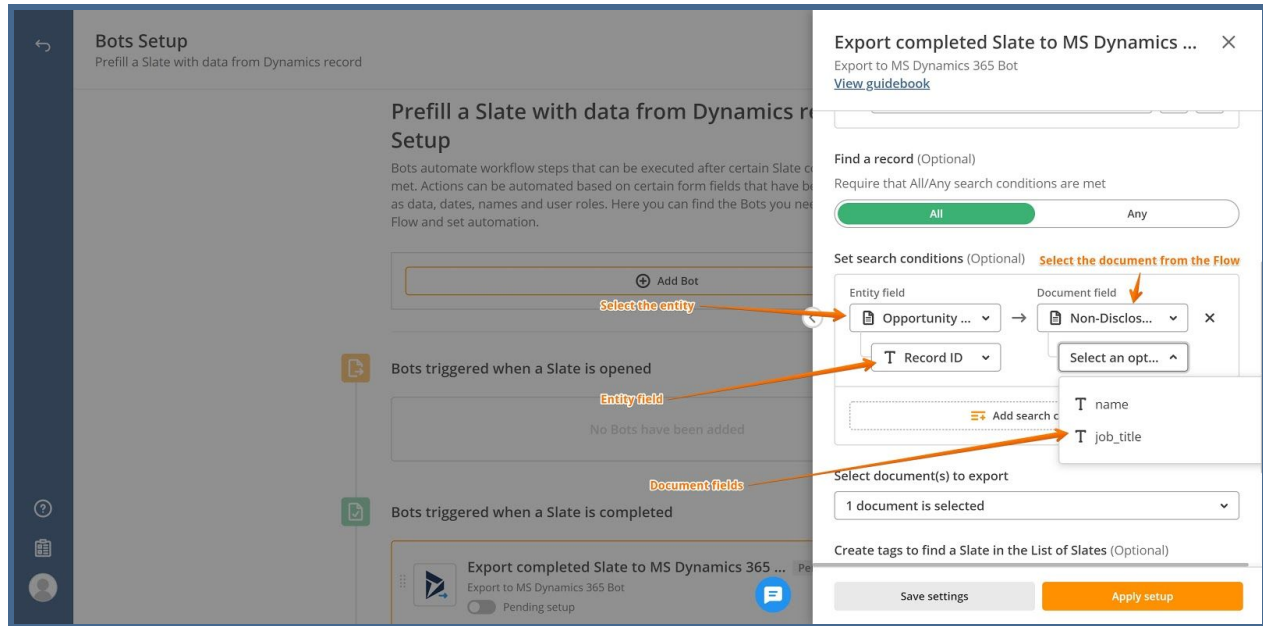
4. Identify the record where you'd like to attach the complete slate as described in *Setup Bots: General settings - Find a record*.

Select what values identify this record (i.e. account number, company name) and match them between the record and the document.

Start with clicking the **Add search condition**.



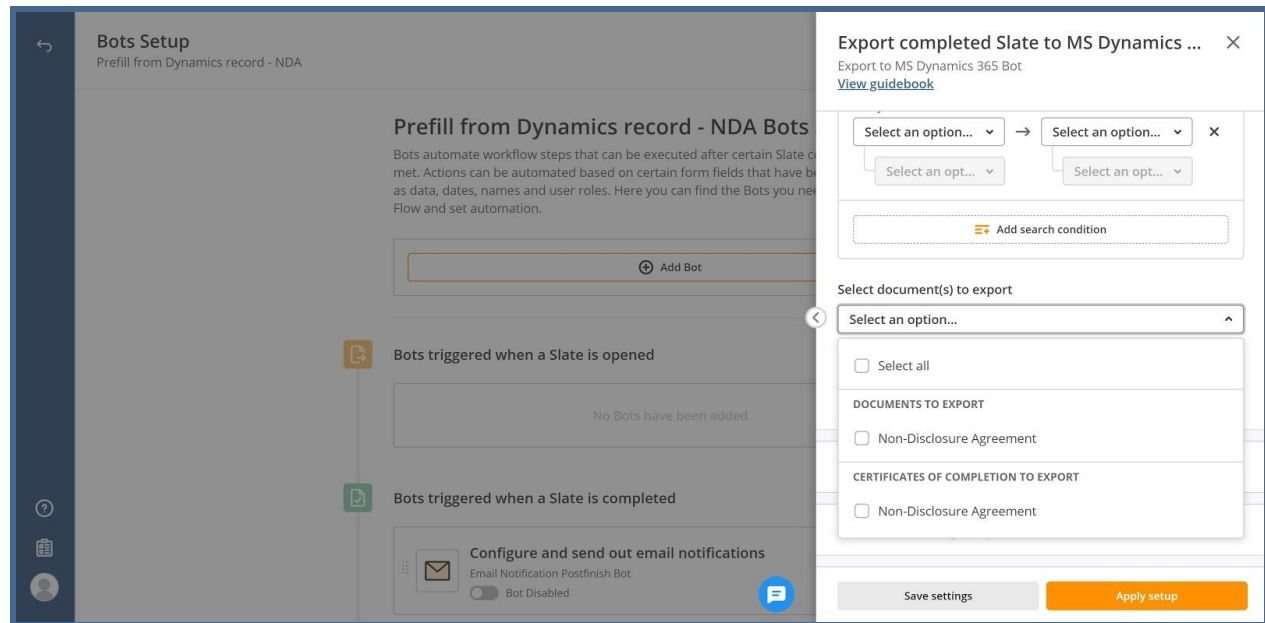
5. Select the **Entity field** from the dropdown, then select the **Document field** from the other dropdown under the name of your document.



Feel free to add as many identifying fields as you want. To do so, just click **Add search condition** and repeat the matching.

Note: if the lookup finds more than one matching record, none of the records can be used to run the Flow.

6. Select the document(s) you'd like to export.



7. Click **Apply setup** when you're done.

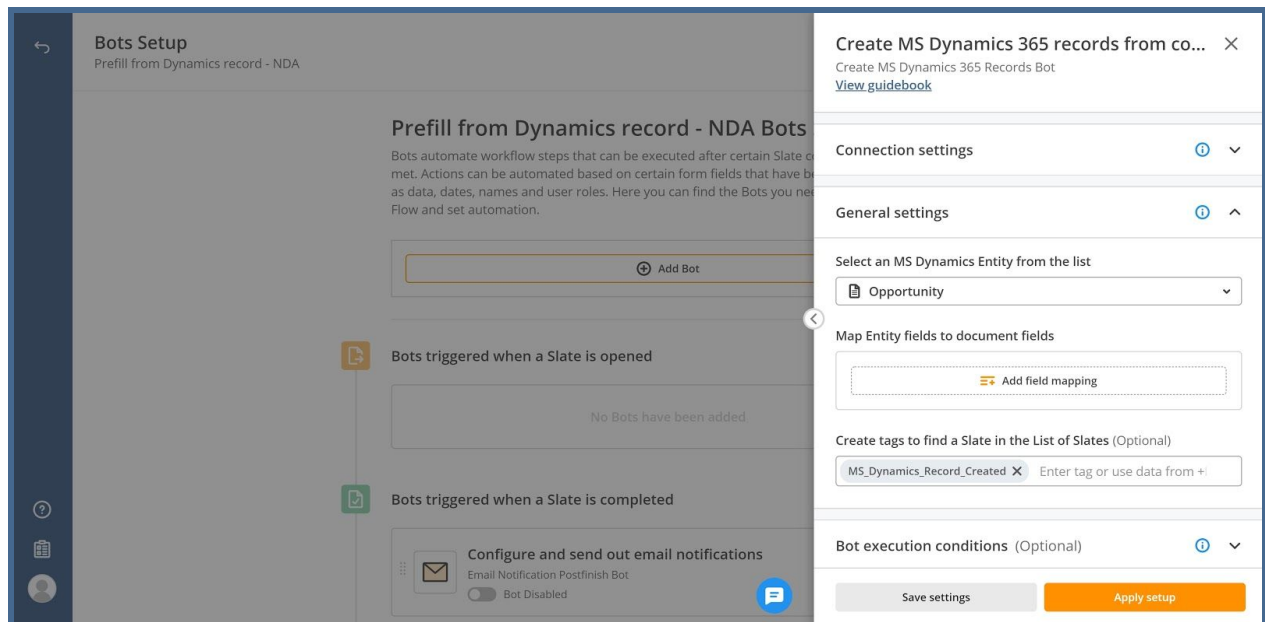
8. Make your Flow public to start using it as described in *Distribute Flow*.

Create MS Dynamics 365 record using data from a completed slate

Apply the Create MS Dynamics 365 Record bot to automatically retrieve data from the completed slate and insert it into the new MS Dynamics 365 record. Combine the data collection via fillable documents with creating records in MS Dynamics 365 in a single automated Flow.

1. Install the Create MS Dynamics 365 record Bot from the airSlate library as described in *Setup Bots: Find & Install an MS Dynamics 365 bot*.
2. Connect your MS Dynamics 365 account as described in *Setup Bots: Connection Settings*.
3. Select the base MS Dynamics 365 entity to set the type of the record you'd like to create.

All entities are listed in the dropdown for your convenience.



4. Map the entity fields with fillable fields in the document as described in *Setup Bots: General Settings - Mapping*.

This allows airSlate bots to transfer data from the document into a new record correctly.

Select entity fields and link them to the fillable fields which should contain the corresponding values in the document.

Remember to map all the required MS Dynamics 365 entity fields, otherwise MS Dynamics 365 won't let you create a new record. They are marked with a star symbol in every record.

Dynamics 365 Sales Opportunities Spring sale order

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NEW DADADOCS SIGNNOW AIRSLATE CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTU... ASSIGN EMAIL A LINK

OPPORTUNITY Spring sale order

Est. Close Date Est. Revenue Status In Progress Owner airSlate Demo

Quality (Active for 63 days, 16 hours) Develop Propose Close

Identify Contact Robert Lockett (sample) Estimated Budget \$12,000.00 Purchase Process click to enter Identify Decision Ma... mark complete

Identify Account Grounds Maintenance (sample) Purchase Timeframe click to enter

Opportunity Sales Process (Active for 63 days, 16 hours) Next Stage

Summary

Topic Spring sale order

Contact Robert Lockett (sample)

Account Grounds Maintenance (sample)

Purchase Timeframe

Currency US Dollar

Budget Amount \$12,000.00

Purchase Process

POSTS ASSISTANT ACTIVITIES NOTES ONENOTE

Enter post here

POST

All posts Auto posts User posts

Spring sale order
Opportunity. Created by airSlate Demo for Account Grounds Maintenance (sample).
On Spring sale order's wall
3/10/2020 4:38 PM

Stakeholders

Search for records

Name Role

Robert Lockett (sample) Stakeholder

Start with clicking **Add field mapping**.

Bots Setup
Prefill from Dynamics record - NDA

Prefill from Dynamics record - NDA Bots

Bots automate workflow steps that can be executed after certain Slate events are met. Actions can be automated based on certain form fields that have been filled out as data, dates, names and user roles. Here you can find the Bots you need to set up and set automation.

Add Bot

Bots triggered when a Slate is opened

No Bots have been added

Bots triggered when a Slate is completed

Configure and send out email notifications
Email Notification Postfinish Bot
Bot Disabled

Create MS Dynamics 365 records from co... X

Create MS Dynamics 365 Records Bot
[View guidebook](#)

Connection settings

General settings

Select an MS Dynamics Entity from the list
Opportunity

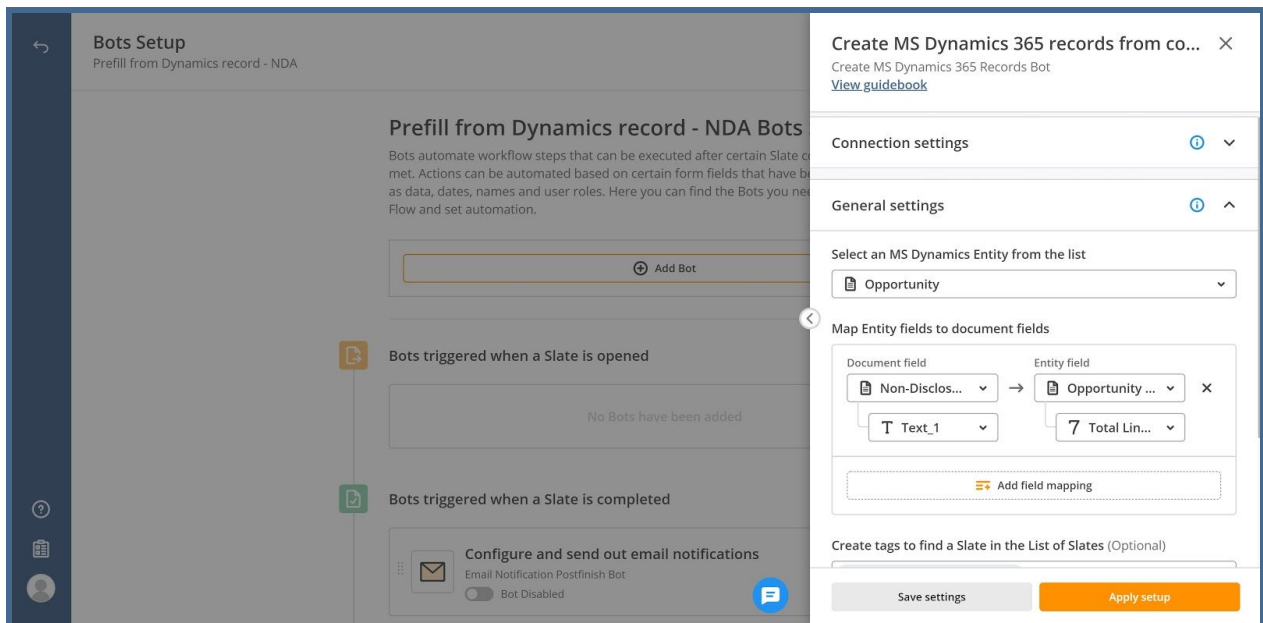
Map Entity fields to document fields
Add field mapping

Create tags to find a Slate in the List of Slates (Optional)
MS_Dynamics_Record_Created X Enter tag or use data from +

Bot execution conditions (Optional)

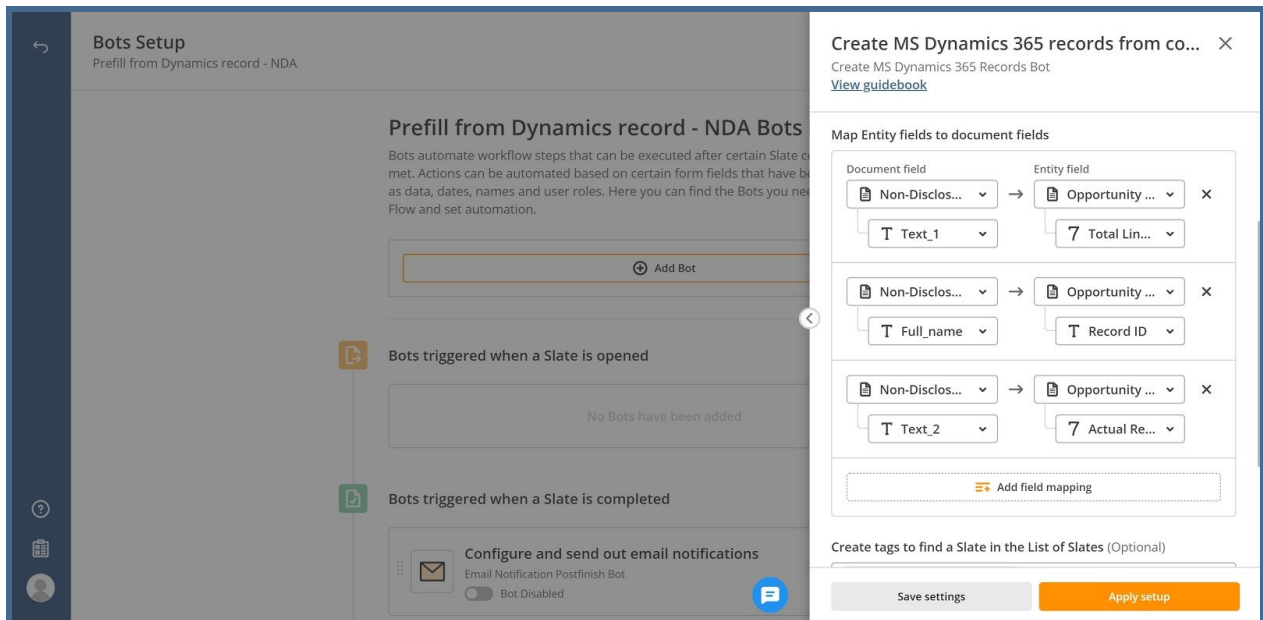
Save settings Apply setup

Select the **Document field** to transfer value from, then select the **Record field** to transfer value into.



Repeat the mapping for every field.

Click **Apply setup** when you're done.



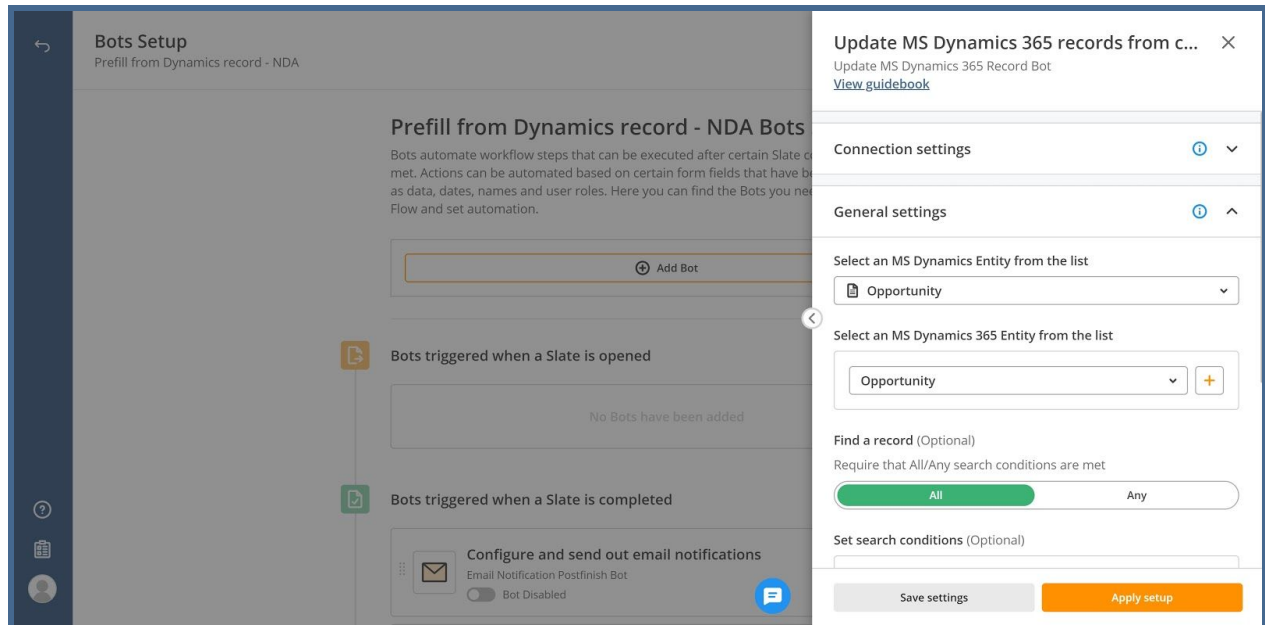
5. Make your Flow public to start using it as described in *Distribute Flow*.

Update MS Dynamics 365 record using data from a completed slate

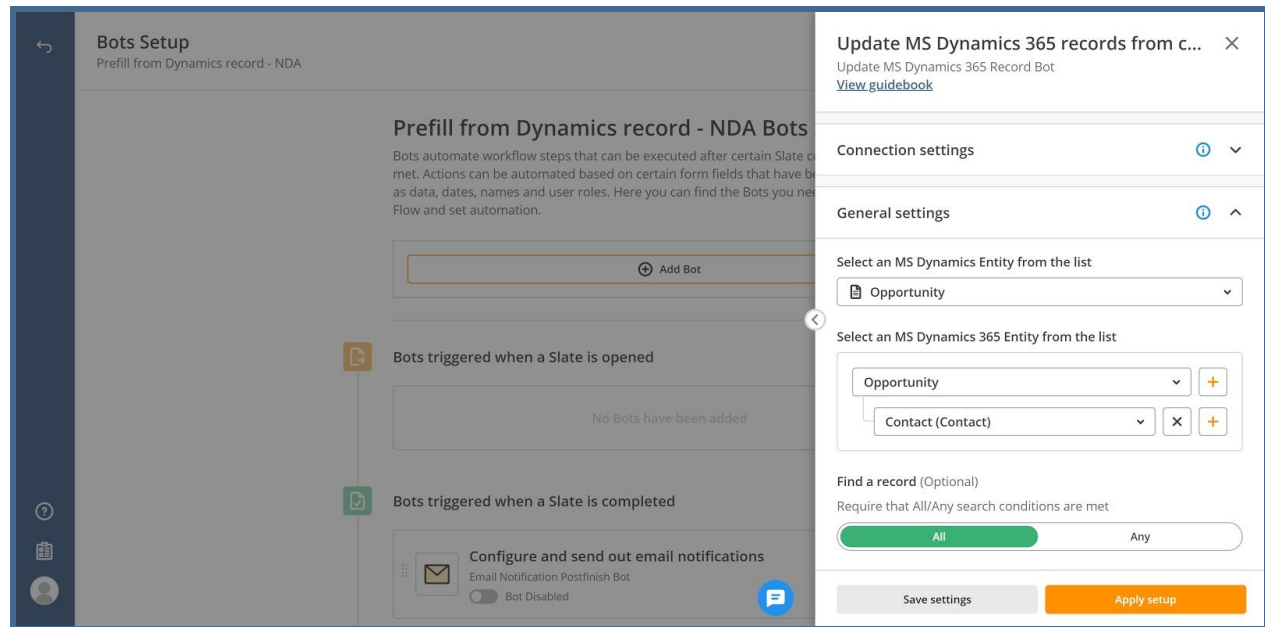
Apply the Update MS Dynamics 365 Record bot to automatically retrieve data from the completed slate and update the MS Dynamics 365 record with it. Combine the data collection via fillable documents with updating records in MS Dynamics 365 in a single automated Flow.

1. Install the Update MS Dynamics 365 record Bot from the airSlate library as described in *Setup Bots: Find & Install the MS Dynamics 365 bot*.
2. Connect your MS Dynamics 365 account as described in *Setup Bots: Connection Settings*.
3. Select the MS Dynamics 365 entity to set the type of the record you'd like to create.

All entities are listed in the dropdown for your convenience.



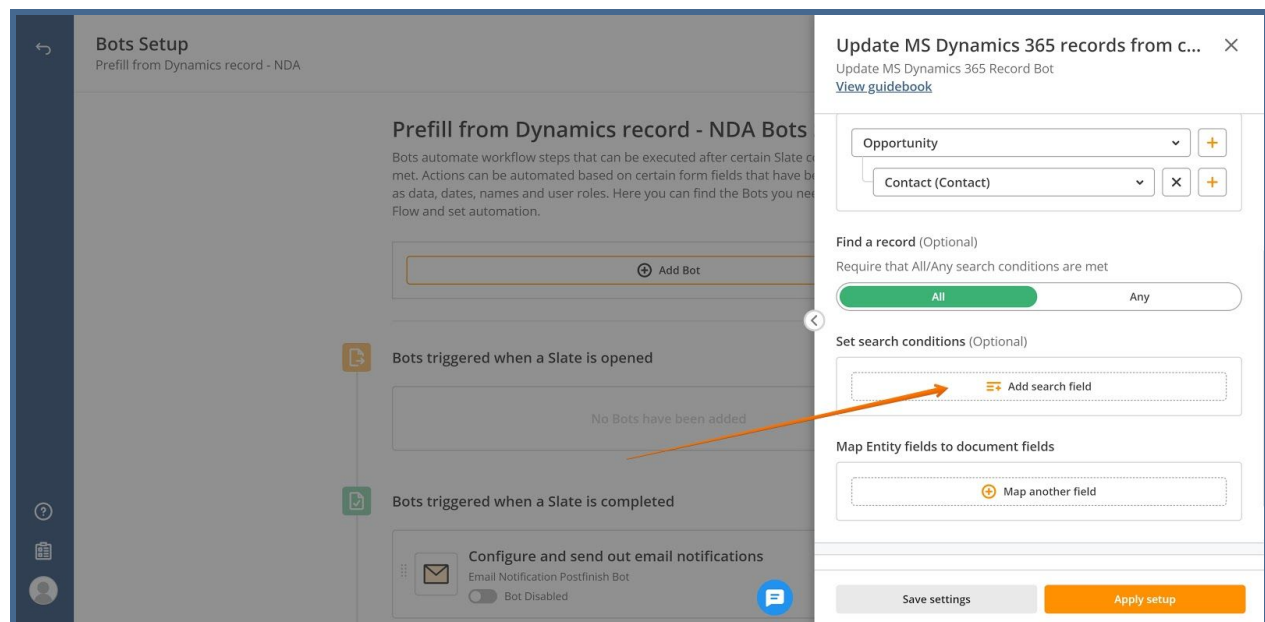
If necessary, select the related Entity as well.



4. Identify the record you'd like to update as described in *Setup Bots: General settings - Find a record*.

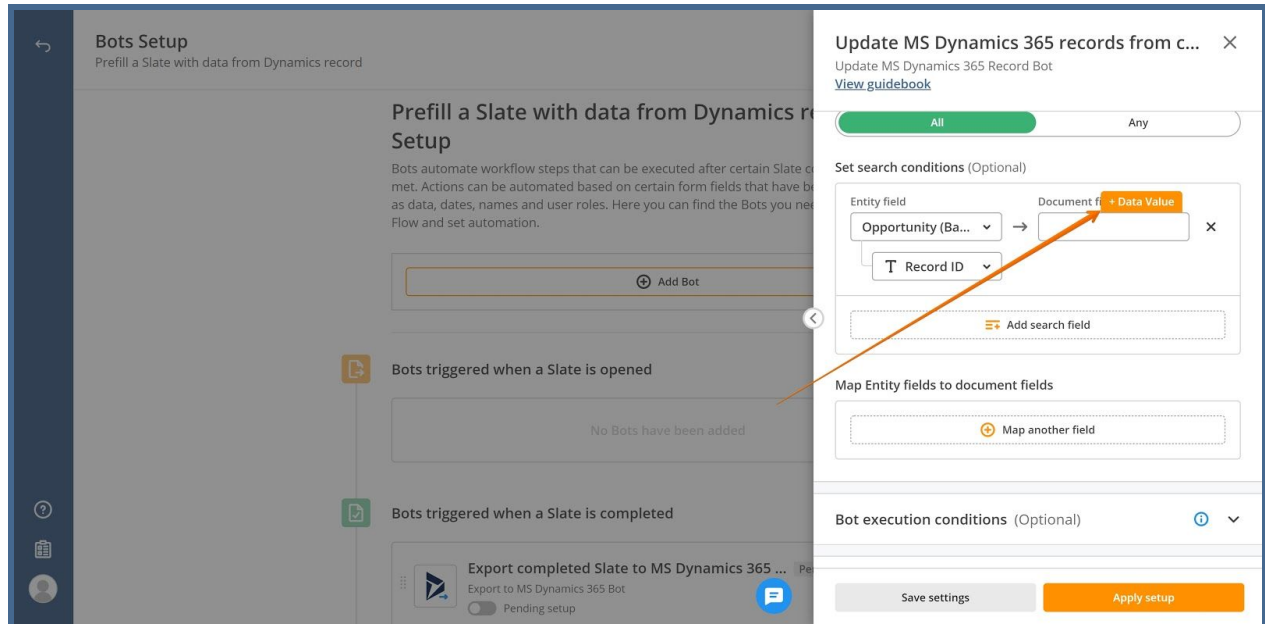
Select record fields which contain these values and link them to the fillable fields which should contain the same values in the document.

Start by clicking **Add search field**.

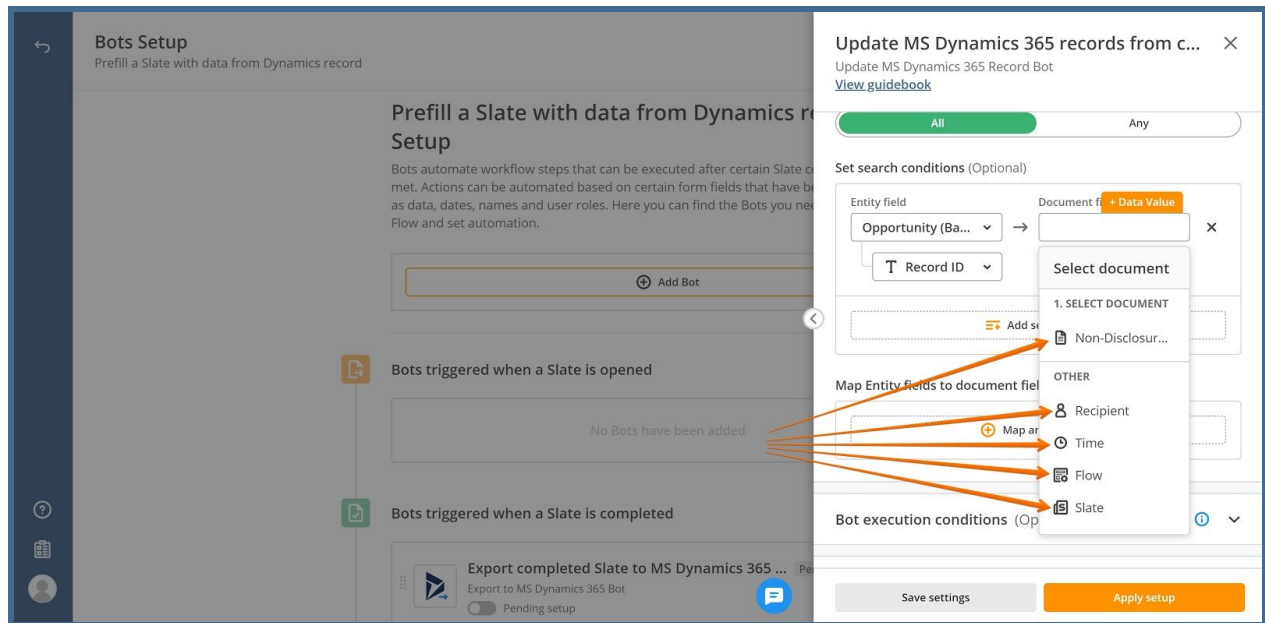


Select the **Entity field** from the dropdown, then select the **Document field** from the other dropdown under the name of your document.

This is the bot that allows you to use identifiers besides the document fields. Click Data values to select a document field or another airSlate object.



Select the name of the document to go to document fields, or use one of the other options: Recipient, Time, Flow, or Slate.



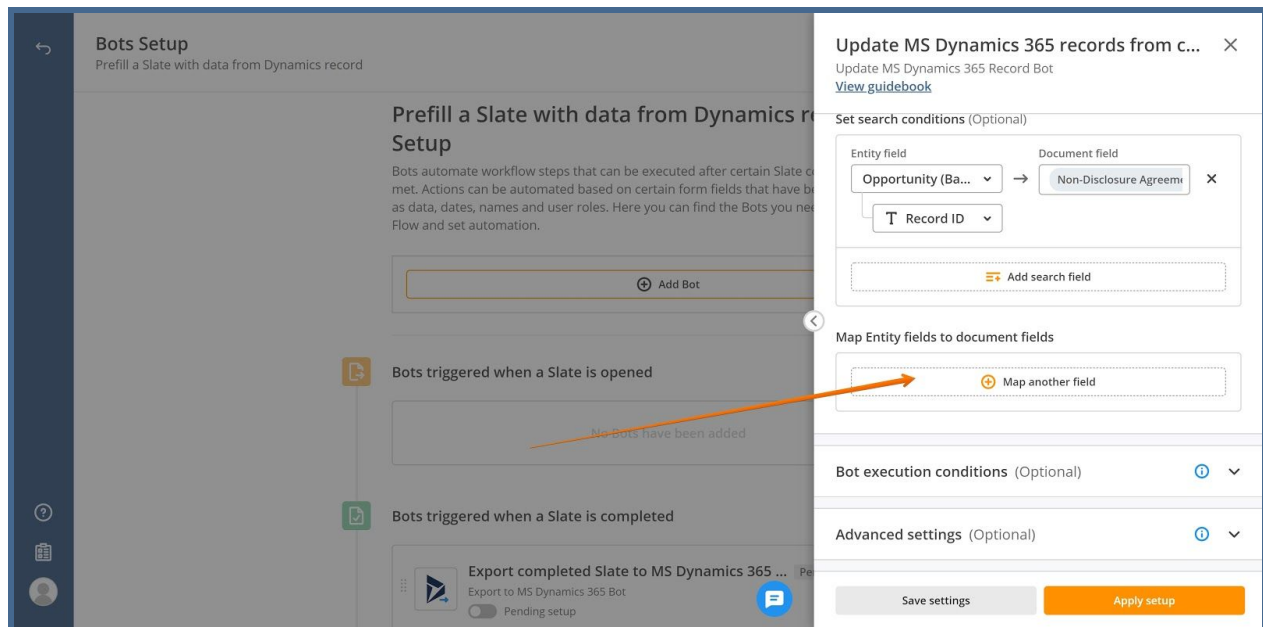
Feel free to add as many identifying values as you want. To do so, just click **Add search field** and repeat the matching.

Note: if the lookup finds more than one matching record, none of the records can be updated.

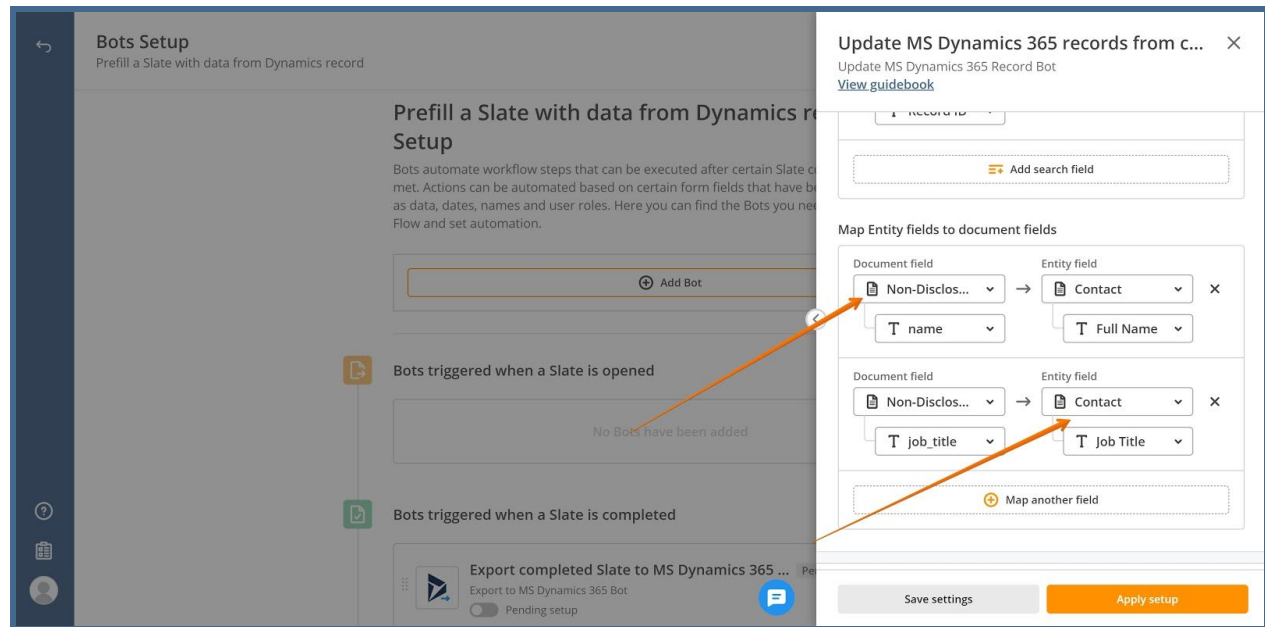
5. Map the record fields with fillable fields in the document as described in *Setup Bots: General Settings - Mapping*.

Select record fields and link them to the fillable fields which should contain the corresponding values in the document.

Start with clicking **Map another field**.



Select the **Document field** to transfer value from, then select the **Entity field** to transfer value into.



Repeat the mapping for every field.

Click **Apply setup** when you're done.

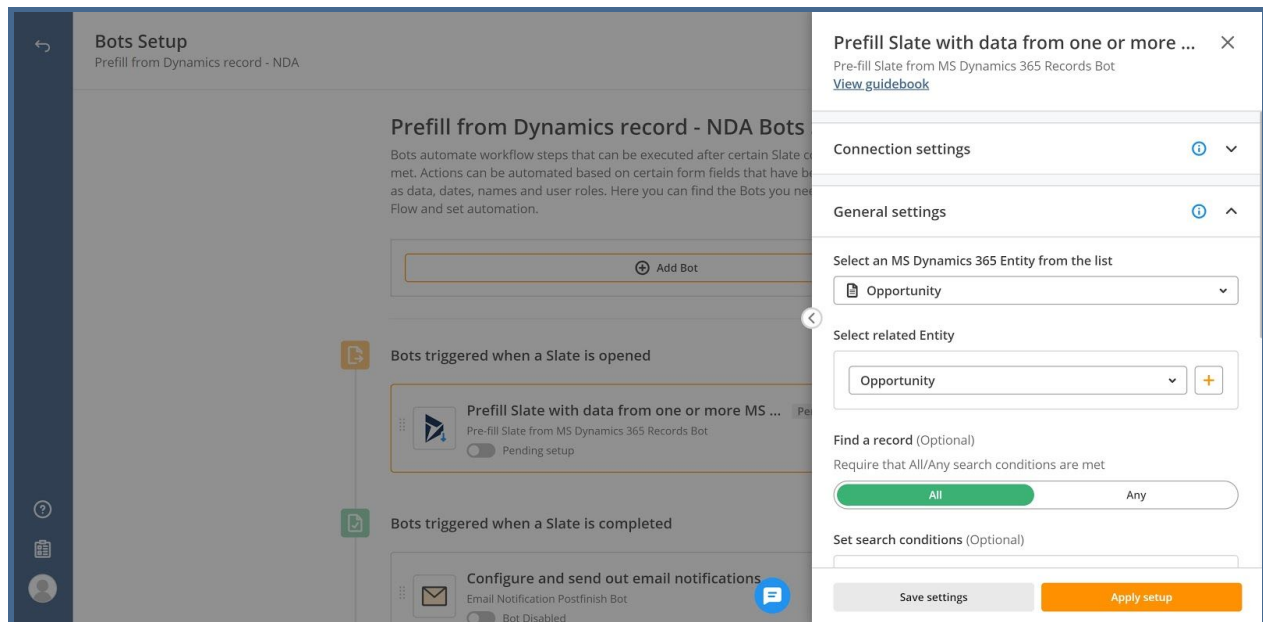
6. Make your Flow public to start using it as described in *Distribute Flow*.

Prefill a slate with data from the MS Dynamics 365 record

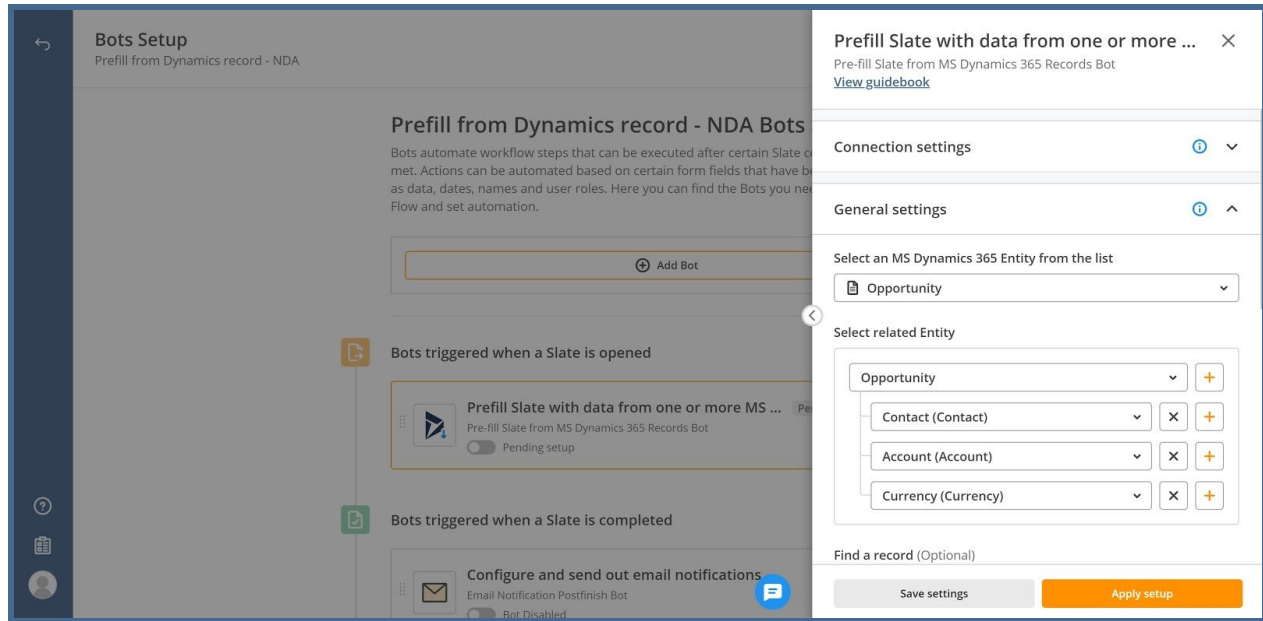
Apply the Prefill MS Dynamics 365 record bot to automatically retrieve data from the MS Dynamics 365 record and prefill a slate with it. Generate documents in MS Dynamics 365 without redundant typing in a single automated Flow.

1. Install the Prefill a Slate from MS Dynamics 365 record Bot from the airSlate library as described in *Setup Bots: Find & Install an MS Dynamics 365 bot*.
2. Connect your MS Dynamics 365 account as described in *Setup Bots: Connection Settings*.
3. Select the MS Dynamics 365 entity to set the type of the record you'd like to create.

All entities are listed in the dropdown for your convenience.



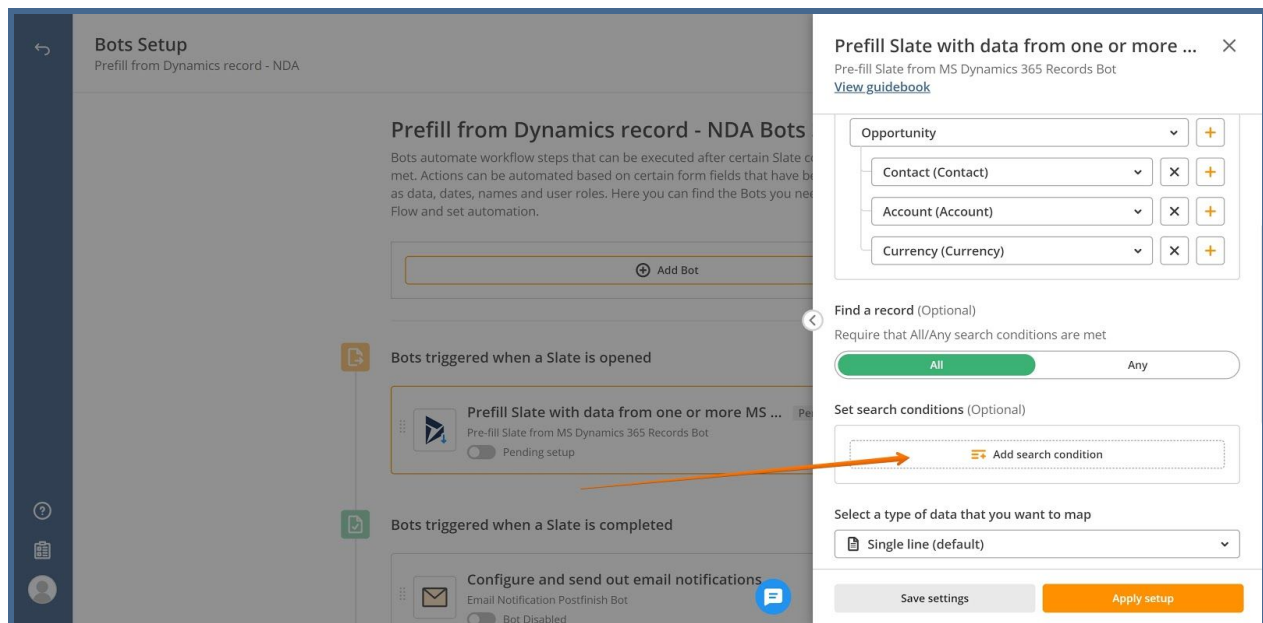
If necessary, select the related Entity as well.



5. Identify the record to retrieve data from as described in *Setup Bots: General settings - Find a record*.

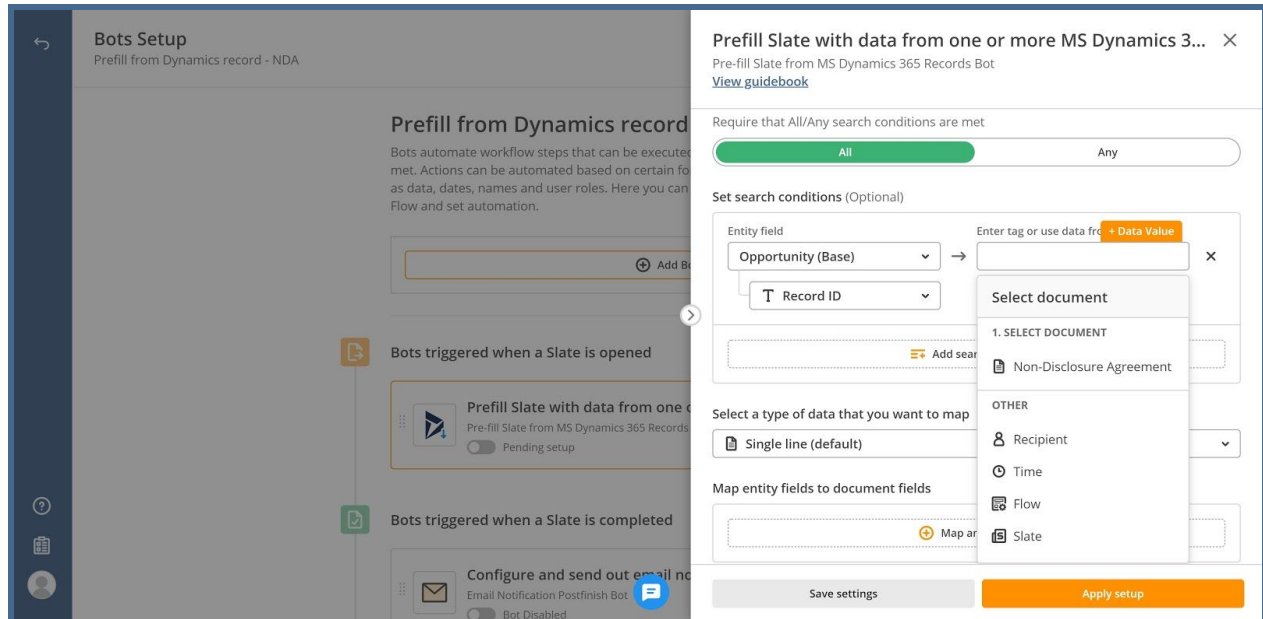
Select record fields which contain these values and link them to the fillable fields which should contain the same values in the document.

Start by clicking **Add search condition**.

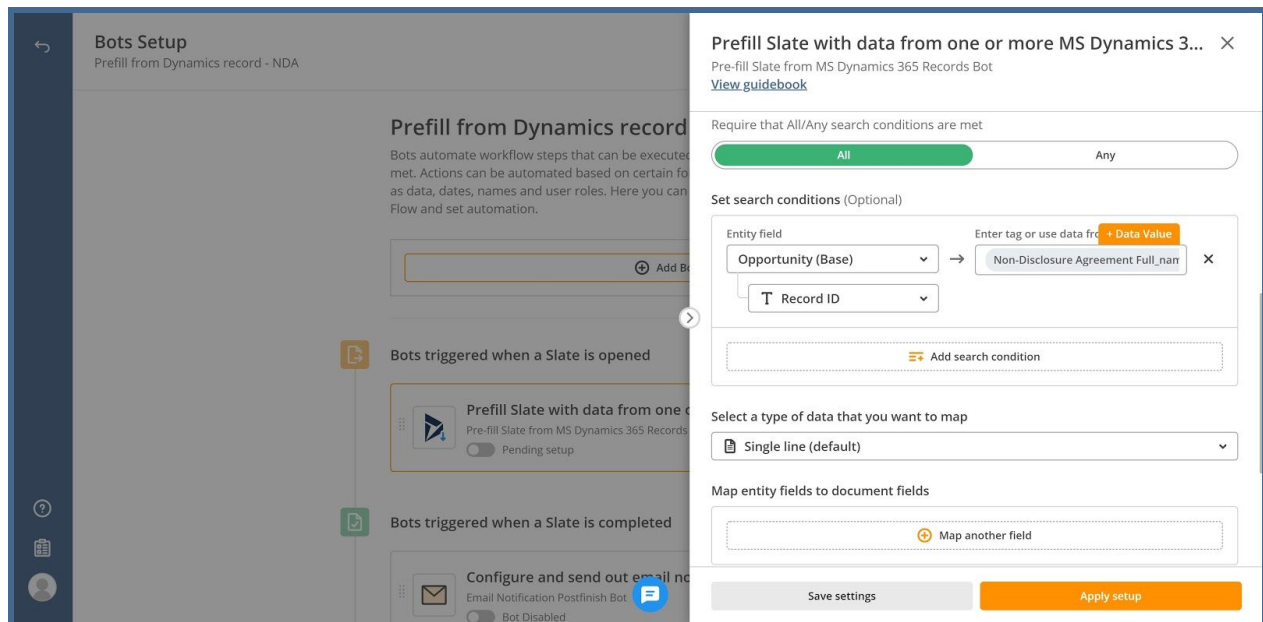


Select the **Entity field** from the dropdown, then select the **Document field** from the other dropdown under the name of your document.

This is the bot that allows you to use identifiers besides the document fields. Click **Data values** to select a document field or another airSlate object.



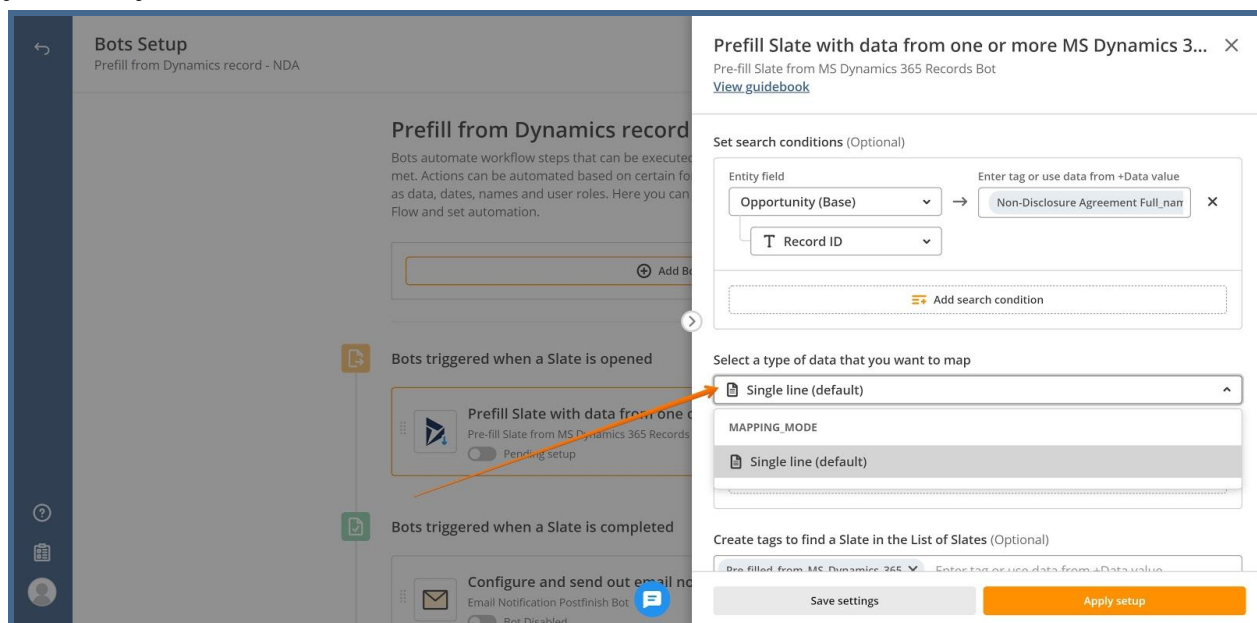
Select the name of the document to go to document fields, or use one of the other options: Recipient, Time, Flow, or Slate.



Feel free to add as many identifying values as you want. To do so, just click **Add search condition** and repeat the matching.

Note: if the lookup finds more than one matching record, none of the records can be updated.

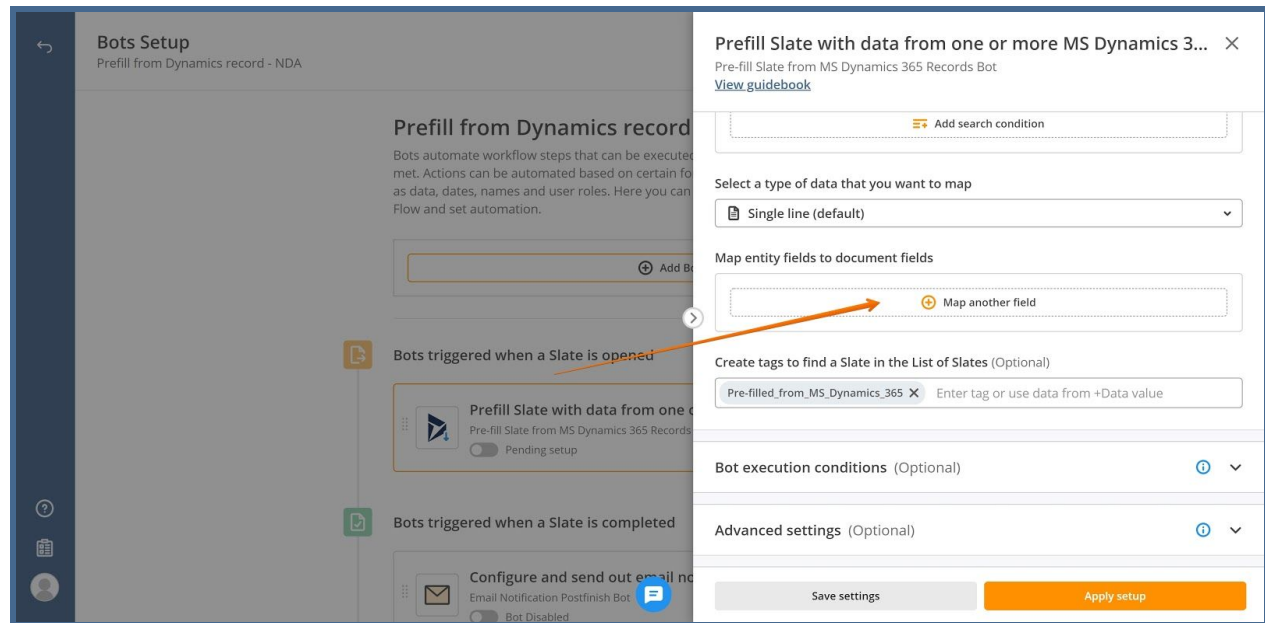
6. Set what type of data you'd like to map: simple text (*Single line*) or table values (*Table*, if your entity/document contains one).



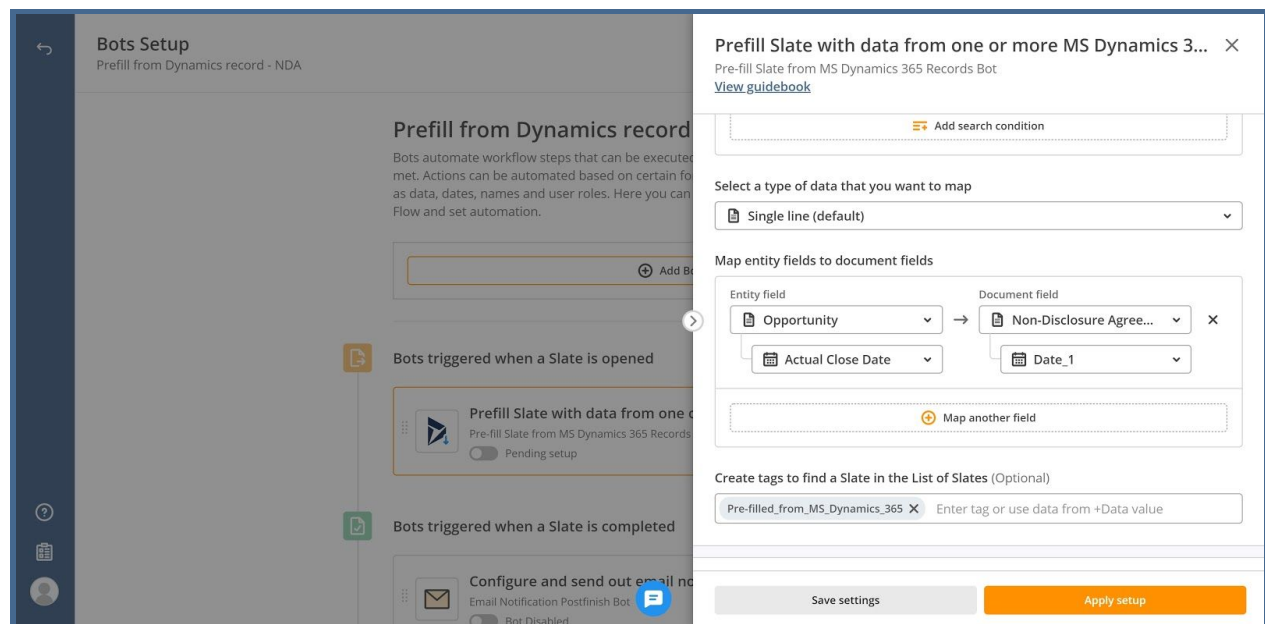
7. Map the record fields with fillable fields in the document as described in *Setup Bots: General Settings - Mapping*.

Select record fields and link them to the fillable fields which should contain the corresponding values in the document.

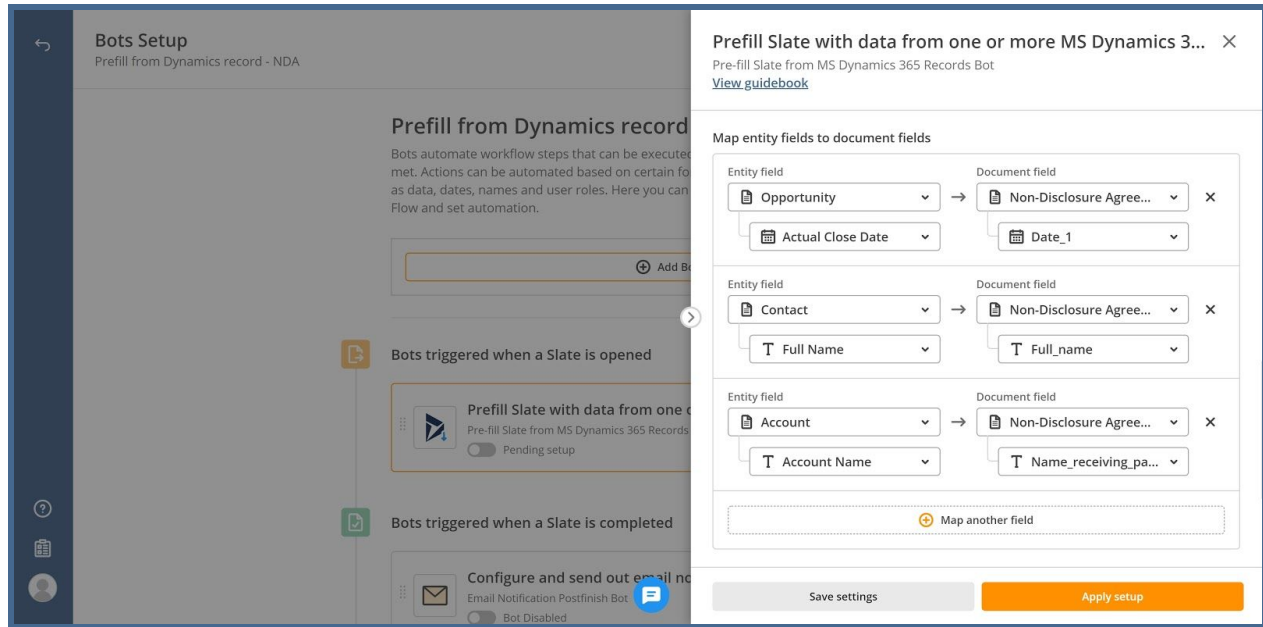
Start with clicking **Map another field**.



Select the **Entity field** to transfer value from, then select the **Document field** to transfer value into.



Repeat the mapping for every field.



8. Configure *Bot execution conditions* (optional).

Note:
follow this step if you're not using any custom buttons in MS Dynamics 365 to run this Flow.

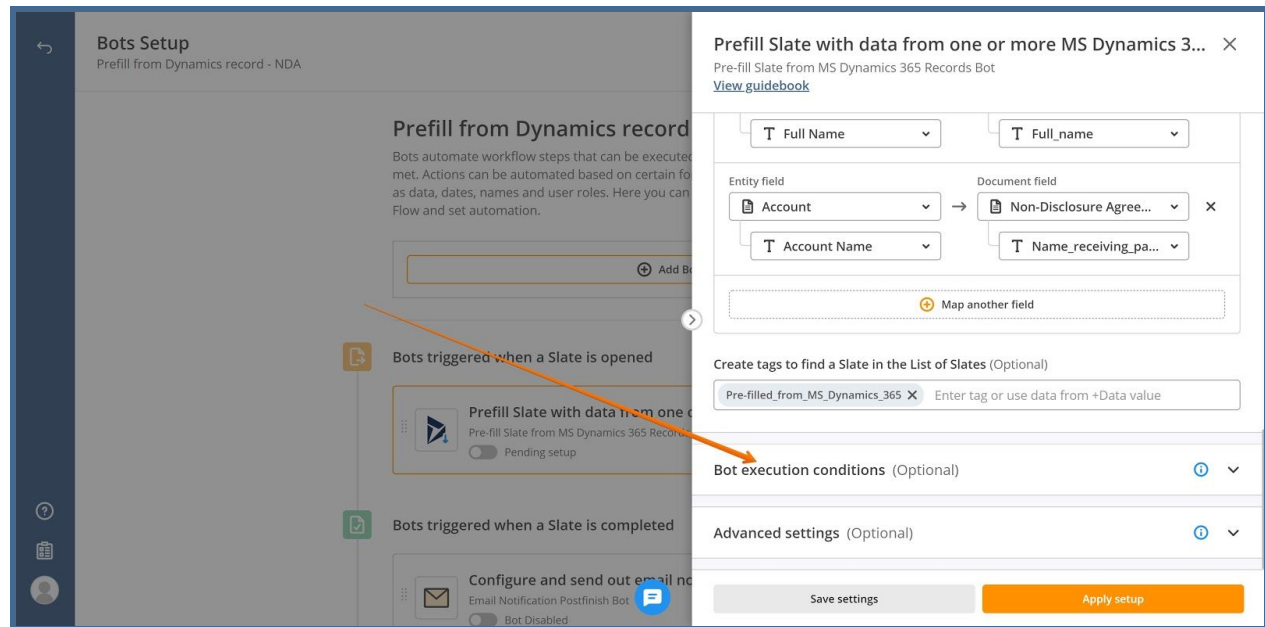
When other MS Dynamics 365 bots identify a record after the Slate has been completed, the Prefill bot has to find the record earlier - before you send the Slate. This allows the bot to prefill a Slate with correct data from the specific MS Dynamics 365 record.

That's why we use Bot execution conditions: to 'set the alarm' for the Bot and get the Slate prefilled at the right time.

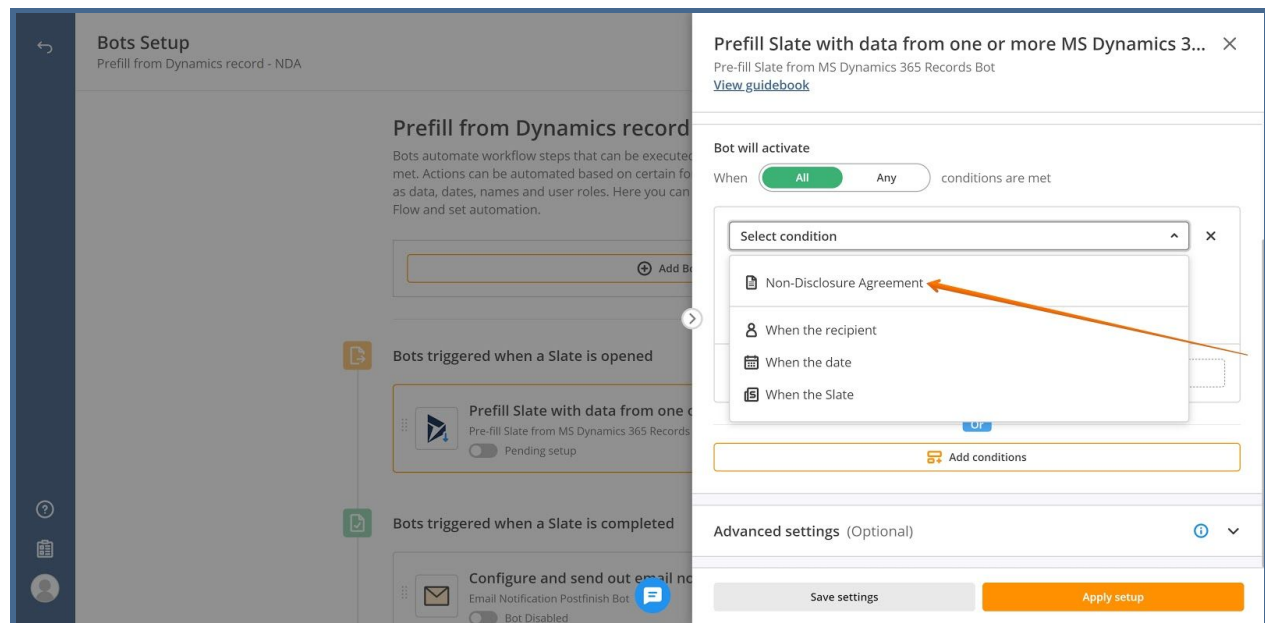
If you're running a Flow directly from an MS Dynamics 365 record, there's no need to use Bot execution conditions because you trigger the bot by clicking the custom button.

If you plan to run the Flow directly from your airSlate account:

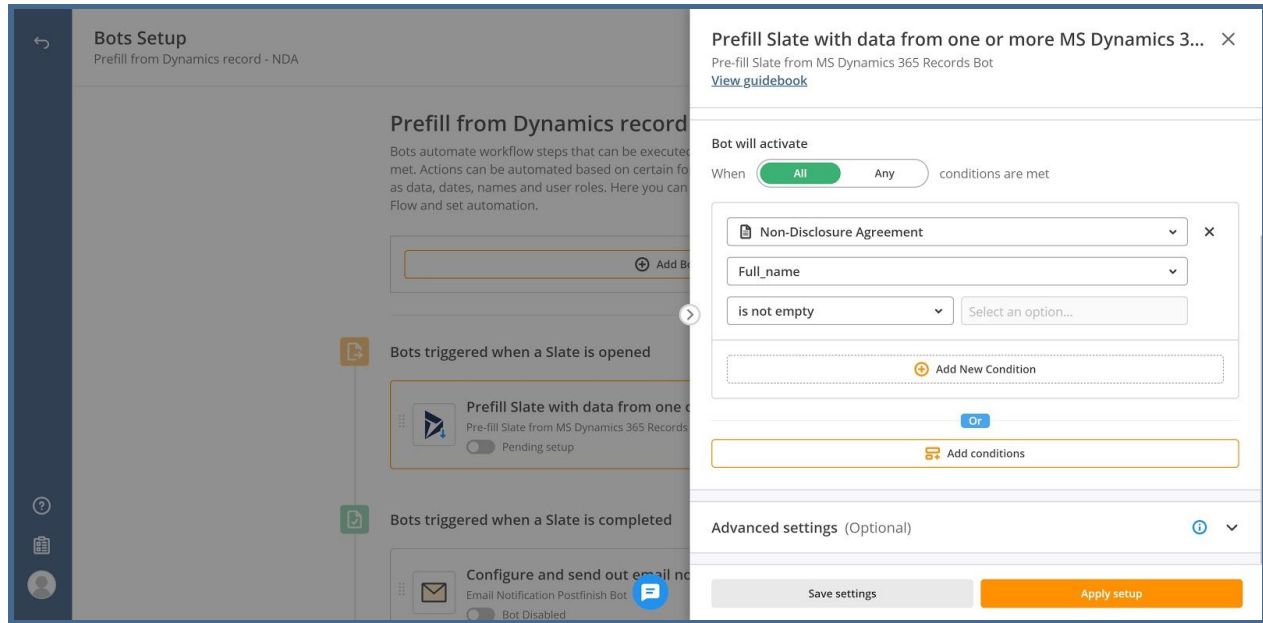
- Go to *Bot execution conditions*



- In *Select condition*, go to the name of the document in the Flow



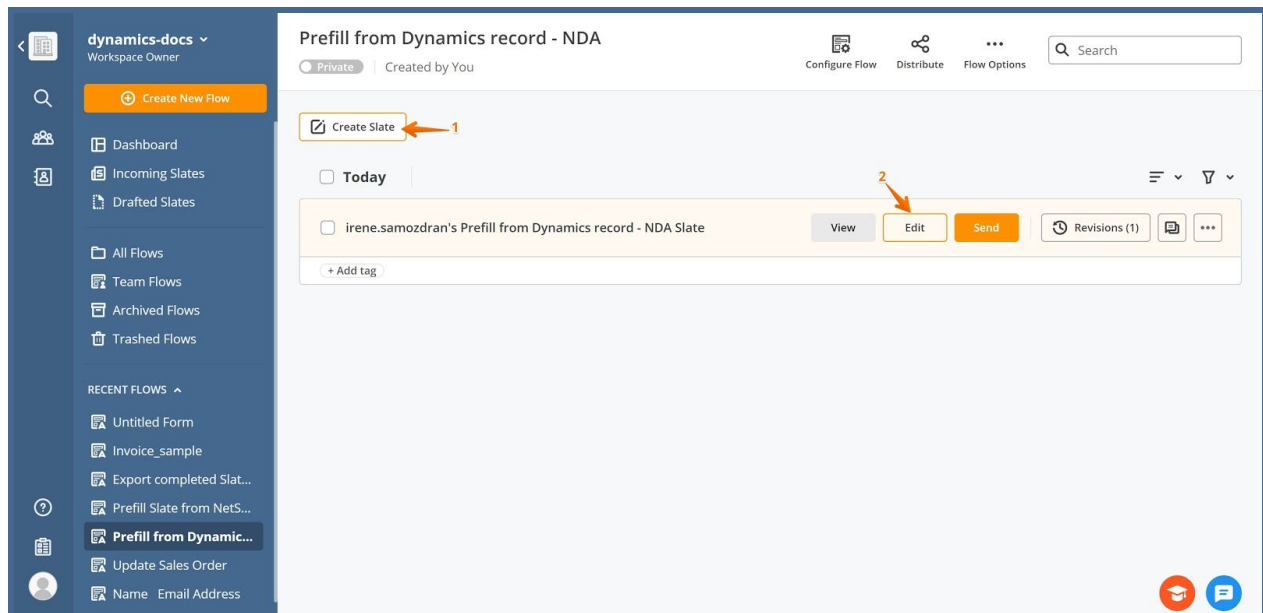
- Next, select the fillable field that you're using to identify a record in Step 5 and set the condition to ***is not empty***.



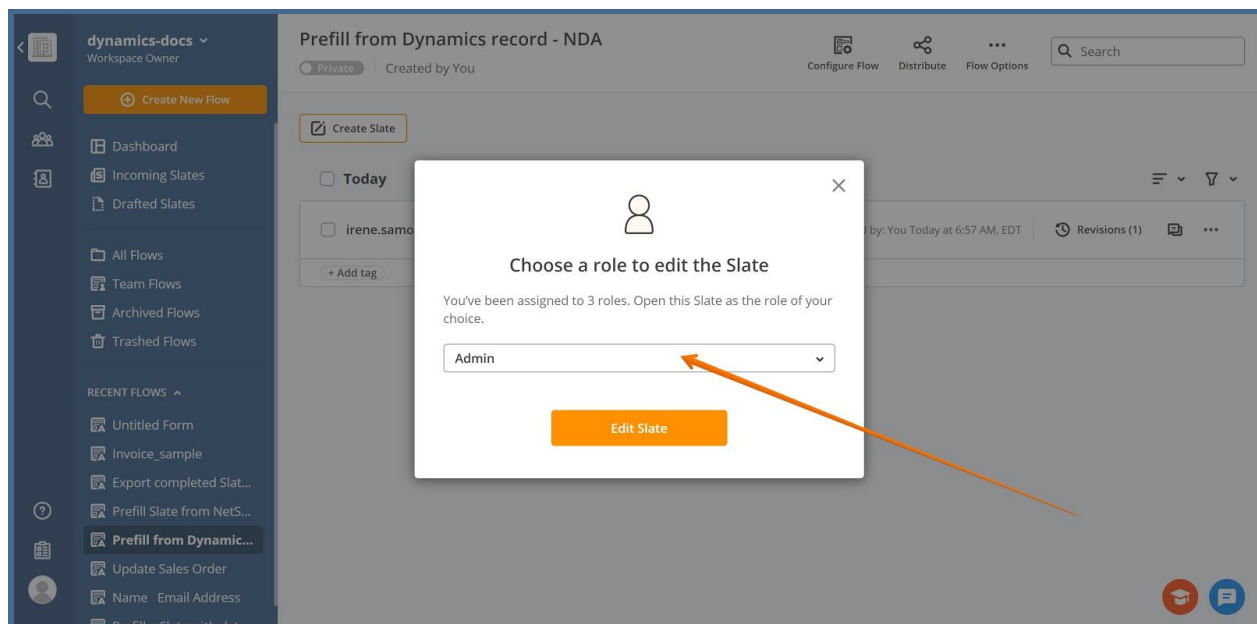
Click **Apply setup** when you're done.

Running the Prefill Flow with Bot execution conditions

- When you click **Create a Slate** in your Flow, select **Edit** in the Slate menu. Hover over the Slate to access the Slate menu.



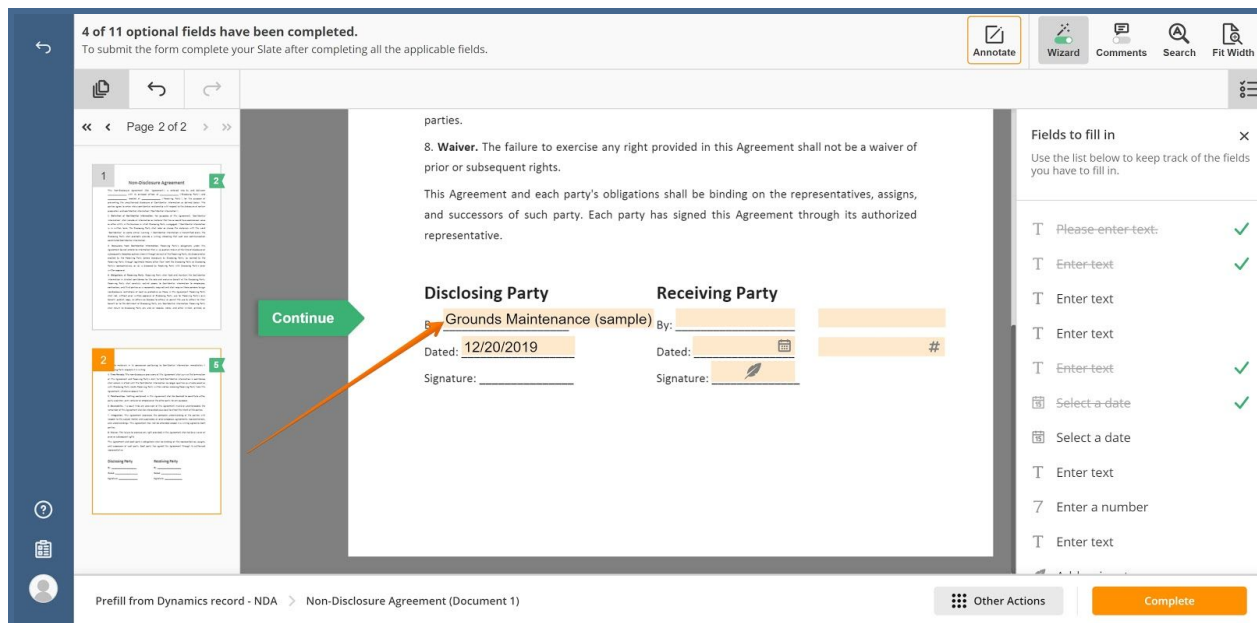
- Select Admin as your role for editing a Slate.



- **IMPORTANT:** Insert the identifying value into the search field you specified in Steps 5 and 8.

The search field value must be similar to the record field value from Step 5.

It's the search field that triggers the bot according to the ***is not empty*** condition. At the same time, its value helps to identify the MS Dynamics 365 record to prefill a Slate from. So, enter the value which identifies the record, i.e. the email address which is equal to the *email* field value in the MS Dynamics 365 Opportunity.



Dynamics 365 Sales Opportunities > Spring sale order

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NEW DADADOCS SIGNNOW AIRSLATE CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTU... ASSIGN EMAIL A LINK

OPPORTUNITY Spring sale order

Est. Close Date Est. Revenue Status In Progress Owner airSlate Demo

Qualify (Active for 63 days, 16 hours) Develop Propose Close

Identify Contact Robert Lockett (sample) Estimated Budget \$12,000.00 Capture Summary click to enter

Identify Account Grounds Maintenance (sample) Purchase Process click to enter

Purchase Timeframe click to enter Identify Decision Ma... mark complete

Opportunity Sales Process (Active for 63 days, 16 hours) Next Stage

Summary

Topic Spring sale order

Contact Robert Lockett (sample)

Account Grounds Maintenance (sample)

Purchase Timeframe

Currency US Dollar

Budget Amount \$12,000.00

Purchase Process

POSTS ASSISTANT ACTIVITIES NOTES ONENOTE

Enter post here

POST

All posts Auto posts User posts

Spring sale order

Opportunity: Created by airSlate Demo for Account Grounds Maintenance (sample).

On Spring sale order's wall

3/10/2020 4:38 PM

Stakeholders

Search for records

Name Role

Robert Lockett (sample) Stakeholder

- Only after this, send a Slate.

dynamics-docs Workspace Owner

Create New Flow

Dashboard Incoming Slates Drafted Slates

All Flows Team Flows Archived Flows Trashed Flows

RECENT FLOWS

Prefill from Dynamic... Untitled Form Invoice_sample Export completed Slat... Prefill Slate from NetS... Update Sales Order Name Email Address

Prefill from Dynamics record - NDA

Private Created by You

Configure Flow Distribute Flow Options Search

Create Slate

Today

irene.samozdran's Prefill from Dynamics record - NDA Slate View Edit Send

+ Add tag

Revisions (1)

If you're running a Flow directly from an MS Dynamics 365 record, there's no need to use Bot execution conditions because you trigger the bot by clicking the custom button.

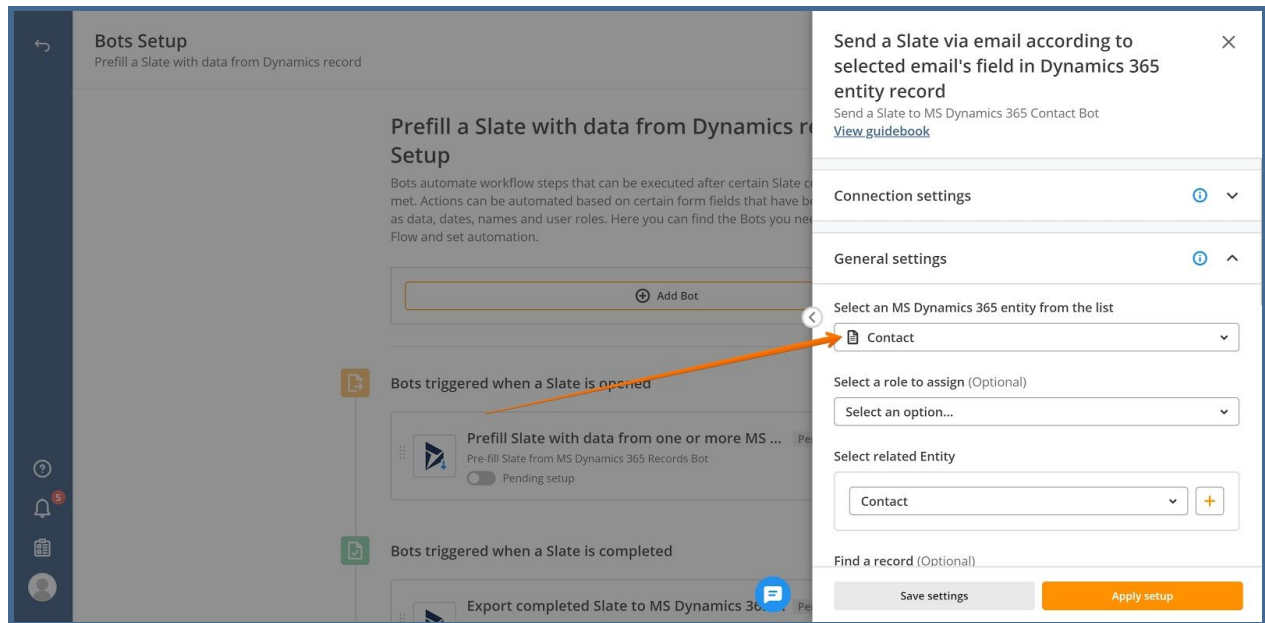
8. Make your Flow public to start using it as described in *Distribute Flow*.

Send a Slate to MS Dynamics 365 Contact

Apply the Send a Slate MS Dynamics 365 Contact bot to automatically send a fillable document from an airSlate Flow to a contact in the MS Dynamics 365 record.

1. Install the Send a Slate to MS Dynamics 365 record Bot from the airSlate library as described in *Setup Bots: Find & Install an MS Dynamics 365 bot*.
2. Connect your MS Dynamics 365 account as described in *Setup Bots: Connection Settings*.
3. Select the MS Dynamics 365 entity to set the type of the record you'd like to create.

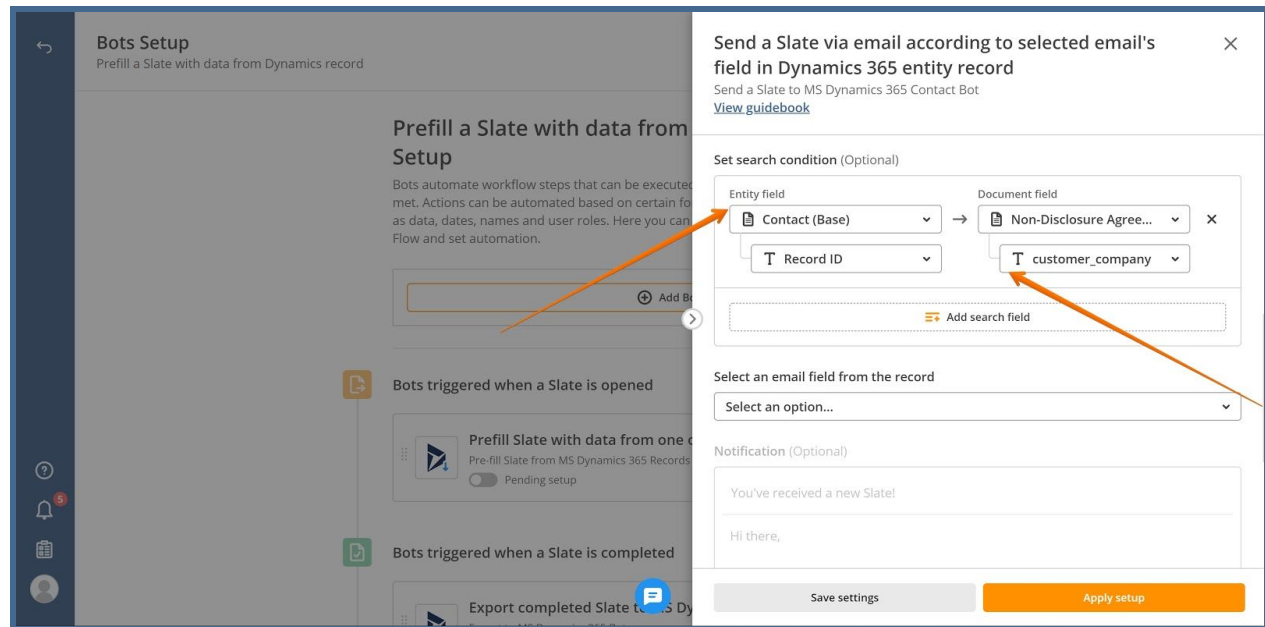
All entities are listed in the dropdown for your convenience.



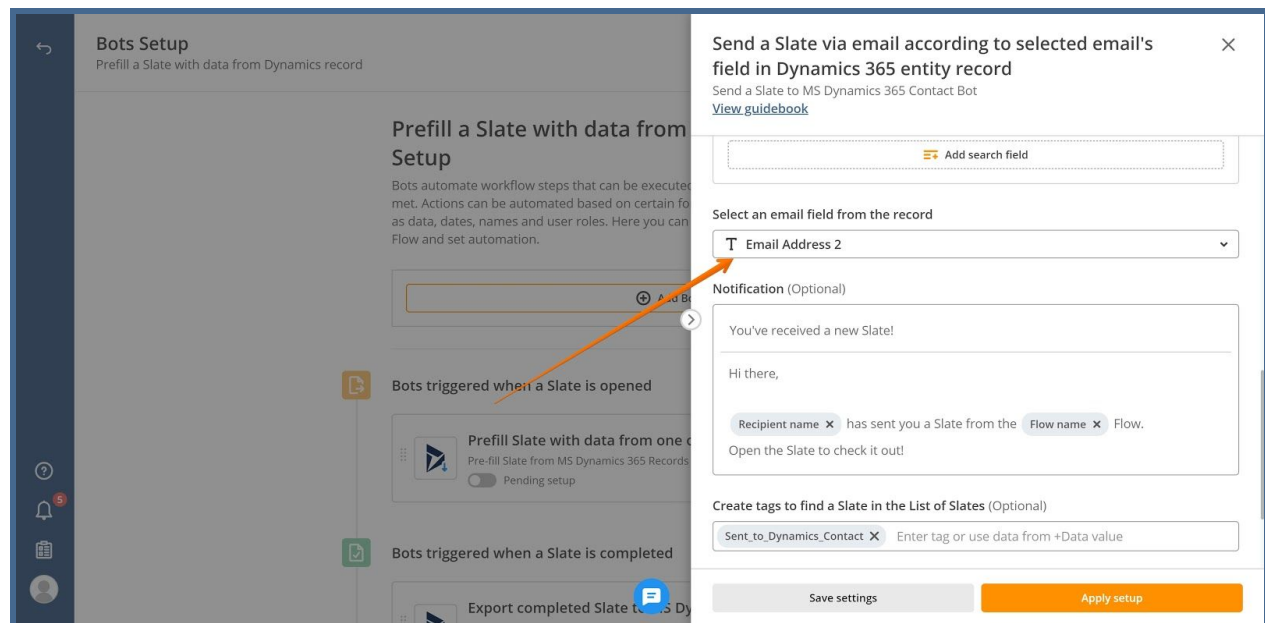
4. Select a role to assign (if necessary).
5. Select the related entities (if necessary).
6. Identify the record to retrieve data from as described in *Setup Bots: General settings - Find a record*.

Select record fields which contain these values and link them to the fillable fields which should contain the same values in the document.

Start by clicking **Add search field**.



7. Select an email field in the record.



Customize the email body and subject if you'd like.

Click **Apply setup** when you're ready.

Prefill from Dynamics 365 bot + airSlate MS Flow connector

Requirements:

- airSlate account
- MS Dynamics 365 account
- MS Flow account

3 main stages:

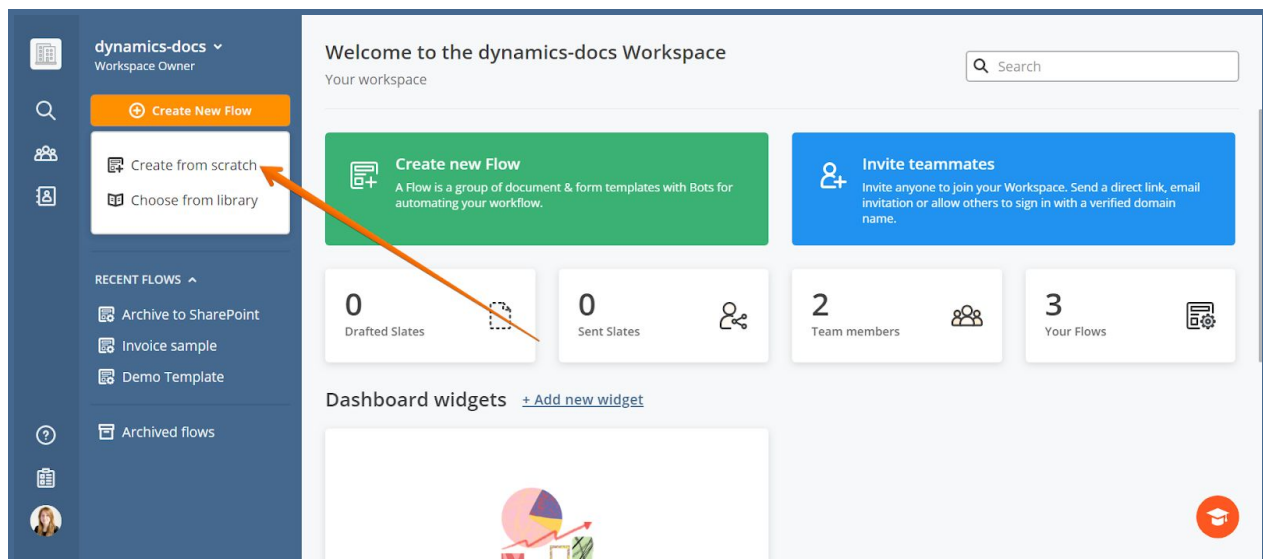
Stage 1: Create a Flow in airSlate with the Pre-fill from Dynamics 365 bot

Stage 2: Connect the Dynamics 365 account to the Prefill from Dynamics 365 bot

Stage 3: Create the MS flow with the airSlate flow from Stage 1

Stage 1. Create a Flow in airSlate with the Prefill from Dynamics 365 bot.

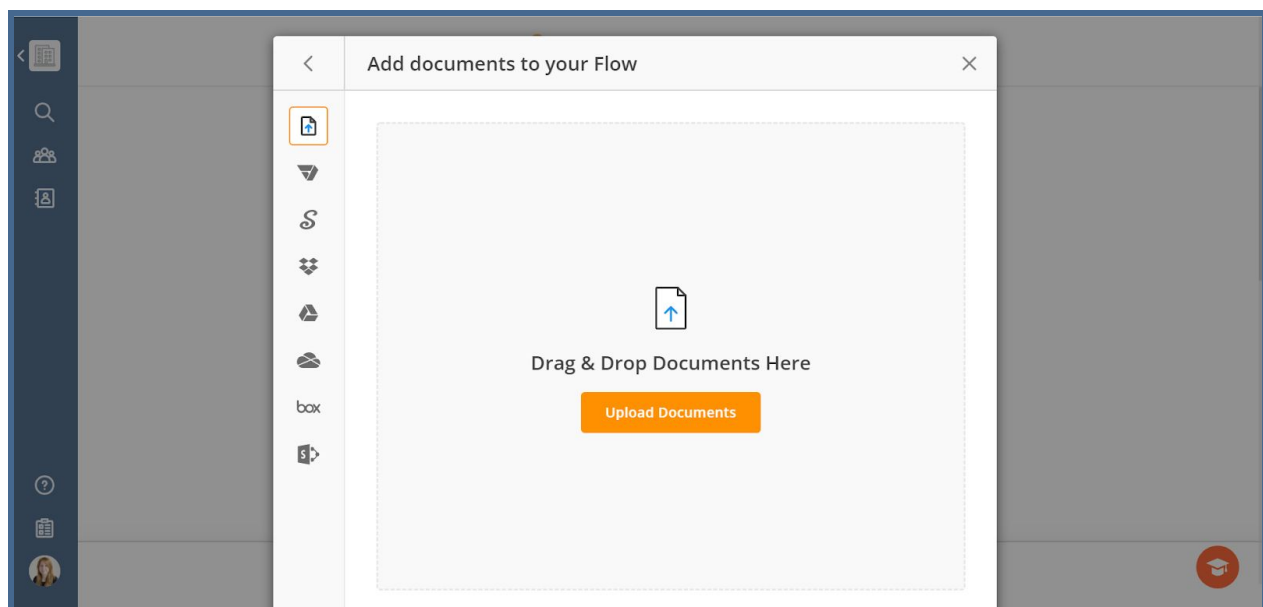
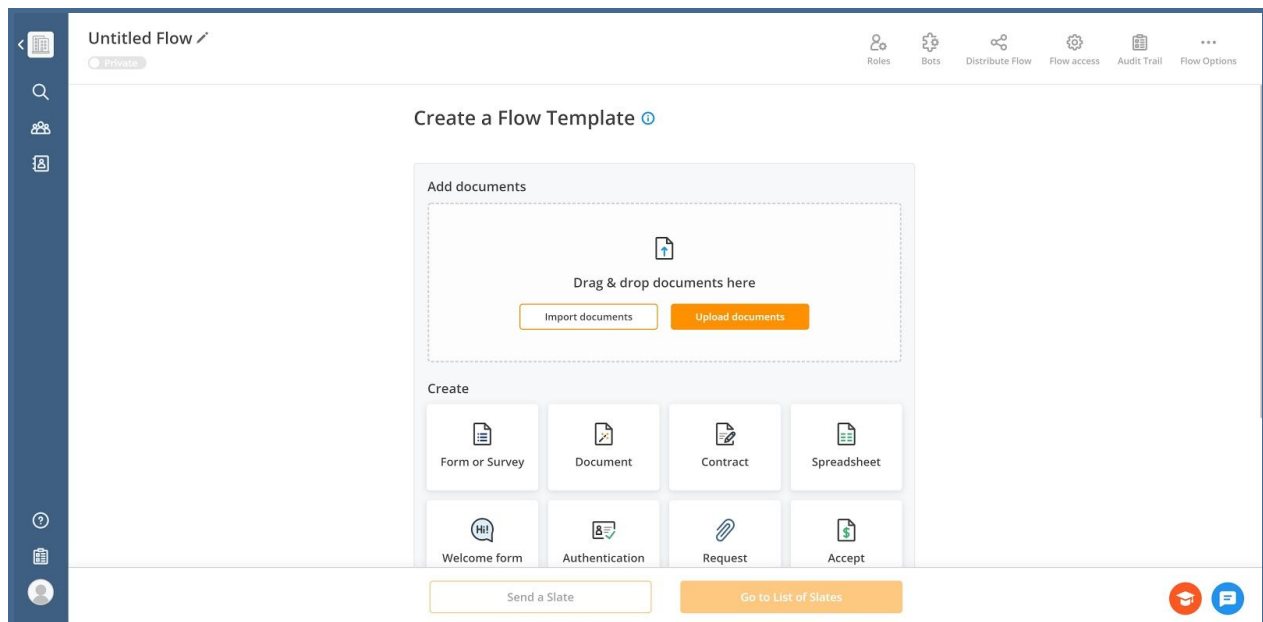
1. Create a new Flow.



2. Name the flow and add the document to it.

Let's use an NDA Agreement for this example. There are three different options to add a document to your Flow.

- *Import documents*: add files from another application, CRM, or storage (PDFfiller, signNow, Dropbox, Google Drive, OneDrive, Box, SharePoint)
- *Upload documents*: upload or simply drag and drop files from your device
- *Create*: use one of the popular templates to create your document



3. Add fillable fields to your document.

Prefill a Slate with data from Dynamics record

Team

Roles Bots Distribute Flow Flow access Audit Trail Flow Options

Create a Flow Template

List of added documents

Non-Disclosure Agreement
2 pages / 0 fillable fields

Add Fillable Fields

Add or drag & drop documents

Describe your Flow

Add a brief description of what this Flow does, i.e.: Automation for NDAs, job offers and contract signing.

Send a Slate Go to List of Slates

Tip: When you add fillable fields, it's more convenient to name each field. This makes it a lot easier to match them with the record fields later.

In this example, every field is named after the question line:

Edit Add Fields Preview

Arial 14 B I U T

Page 1 of 2

Non-Disclosure Agreement

This Non-Disclosure Agreement (the "Agreement") is entered into by and between Text with its principal offices at Company ("Disclosing Party") and Name located at Company ("Receiving Party") for the purpose of preventing the unauthorized disclosure of Confidential Information as defined below. The parties agree to enter into a confidential relationship with respect to the disclosure of certain proprietary and confidential information ("Confidential Information").

1. Definition of Confidential Information. For purposes of this Agreement, "Confidential Information" shall include all information or material that has or could have commercial value or other utility in the business in which Disclosing Party is engaged. If Confidential Information is in written form, the Disclosing Party shall label or stamp the materials with the word "Confidential" or some similar warning. If Confidential Information is transmitted orally, the Disclosing Party shall promptly provide a writing indicating that such oral communication constituted Confidential Information.

2. Exclusions from Confidential Information. Receiving Party's obligations under this

Text

Add some Text to Help

Enter text

Required field *

Make this field conditional

Field name (required)

my_contact_name

Advanced

Prefill a Slate with data from Dynamics record > Non-Disclosure Agreement

Cancel Complete

Click **Complete** in the bottom right when you're done with fillable fields.

Roles

Create and assign roles to documents and forms in a Flow template. You can assign roles to fillable fields of certain documents as well as grant access permissions.

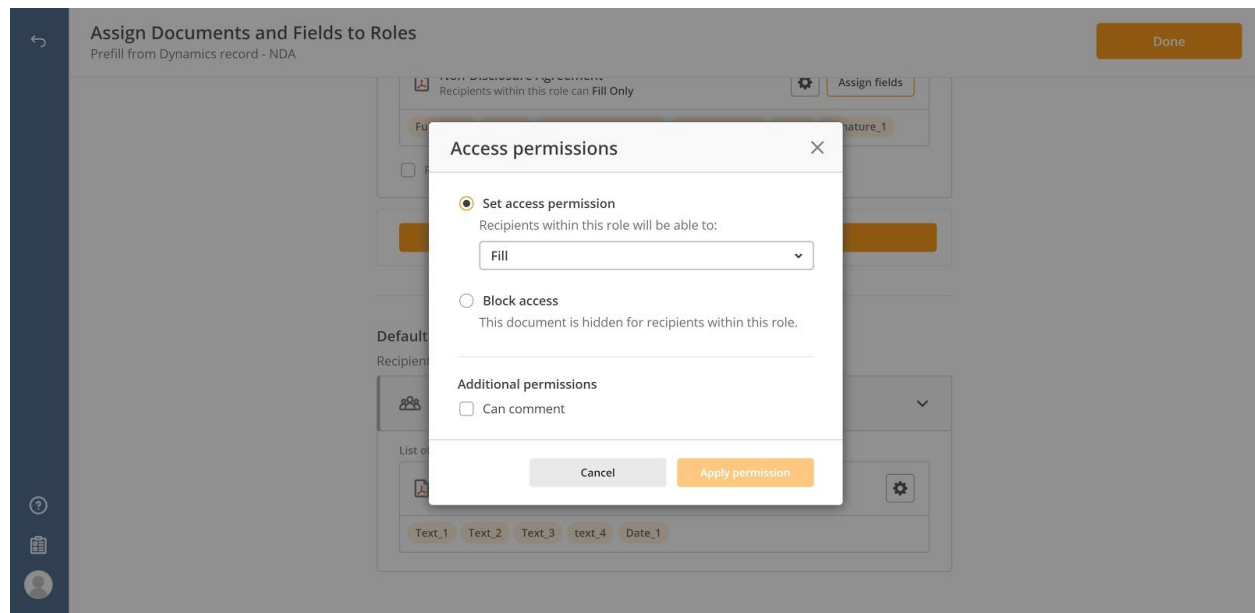
By default, any recipient you share a Flow with will be able to fill out and comment on documents attached.

Choose specific access permissions for each document and add fillable fields to this role.

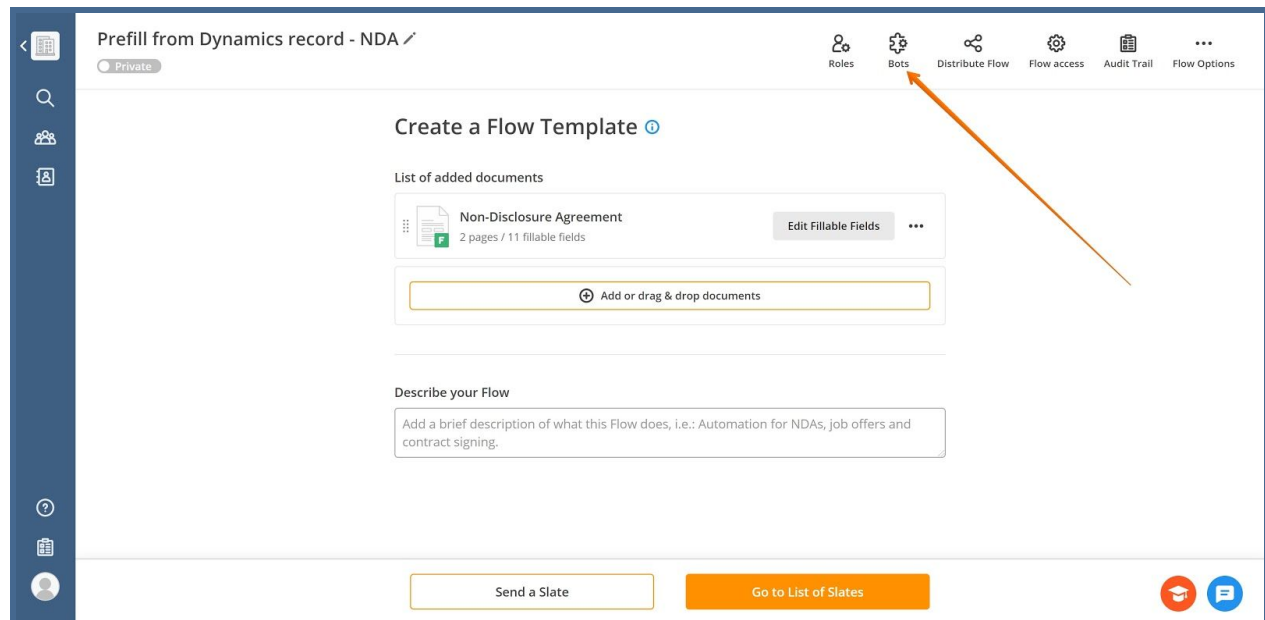
- Under the role name, click **Assign fields** to select fillable fields for this role. Recipients under this role will be able to act on these fields depending on the set role access permission.
- Assign access permissions and fillable fields to the other documents the same way.
- Click **Create new role** to set as many roles as you need.

The screenshot shows the 'Assign Documents and Fields to Roles' interface. At the top, there's a title bar with a back arrow, the title 'Assign Documents and Fields to Roles', a subtitle 'Prefill from Dynamics record - NDA', and a 'Done' button. The main content area is divided into two sections. The first section, 'Flow roles', has a subtitle 'Create roles and assign fillable fields and access permissions.' It displays a role named 'Signer' with a subtitle 'Assigned to 6 fields in 1 document'. Below this is a 'List of documents in Flow Template' showing a document titled 'Non-Disclosure Agreement' with the subtitle 'Recipients within this role can Fill Only'. A list of fields is shown: 'Full_name', 'Date_2', 'Name_receiving_party', 'phone_number', 'email', and 'Signature_1'. There is a gear icon and an 'Assign fields' button. A checkbox 'Revoke access when completed' is also present. Below the list is a 'Create new role' button. The second section, 'Default access', has a subtitle 'Recipients without a role may fill out the following unassigned fields.' It shows a default access entry: 'Default access. Anyone can fill out these document fields' with a subtitle '5 fields in 1 document' and a dropdown arrow.

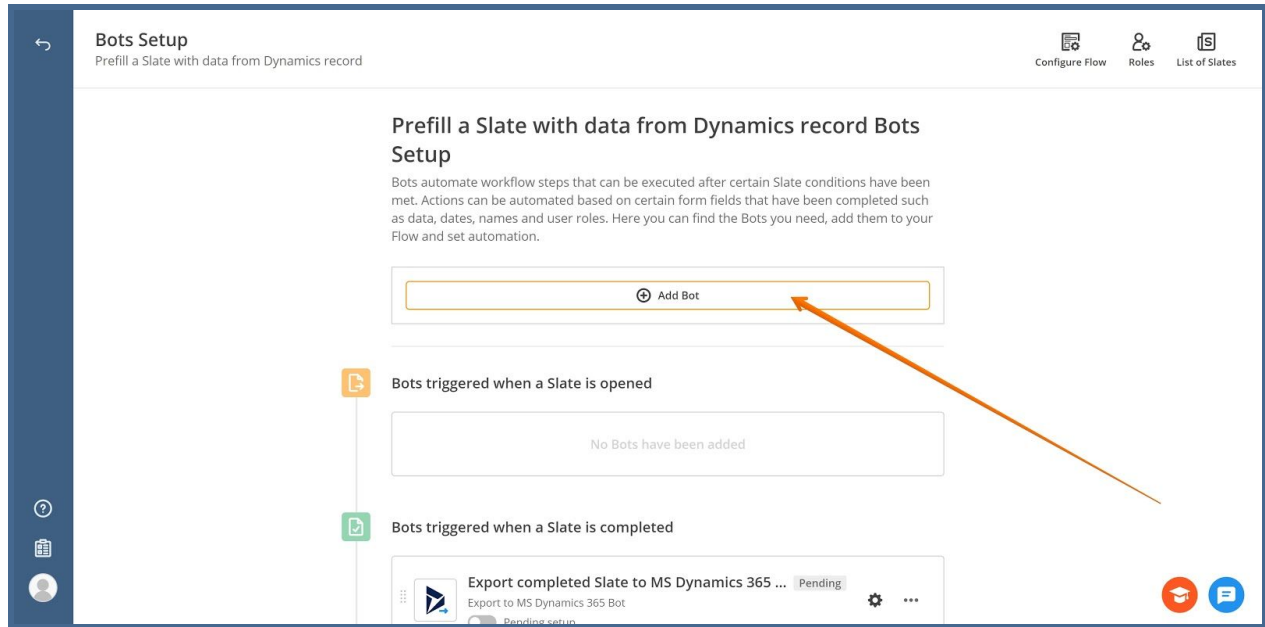
- In Default access, click the gear button to set access permissions for this document (Fill (default), or Read (only viewing the document)). Check **Block access** to hide the fields for this role; check **Can comment** to allow recipients comment on the Slate.



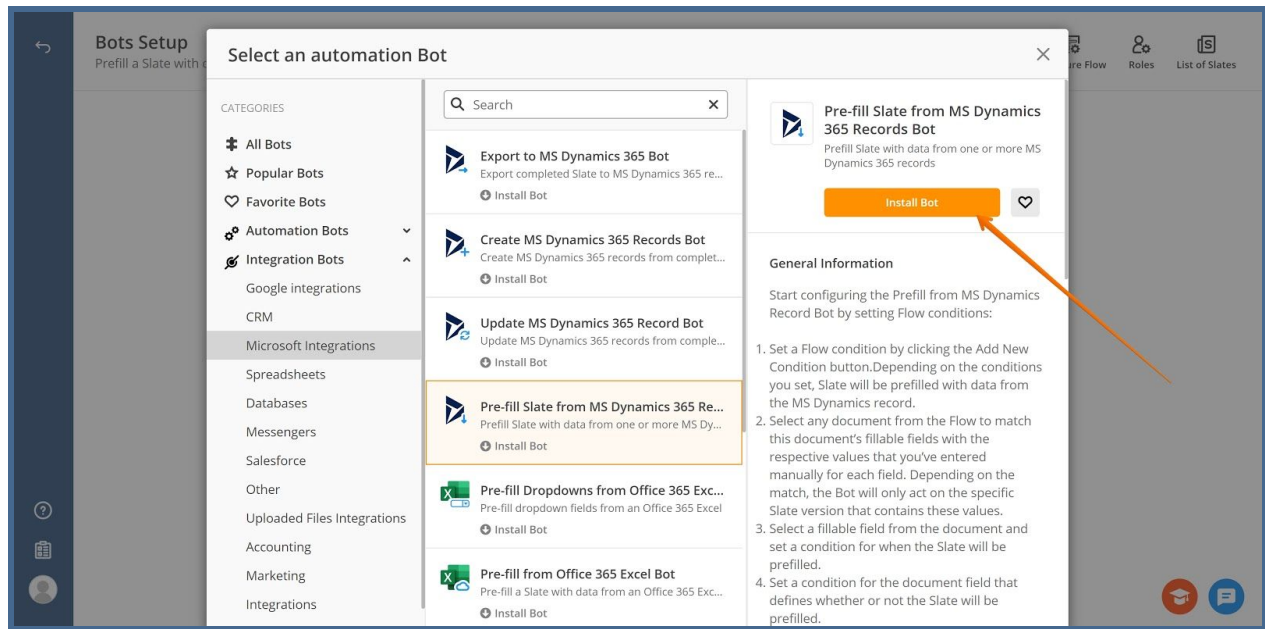
4. Go to **Bots**.



5. Click **Add Bot** on the Bot Automation Setup page.

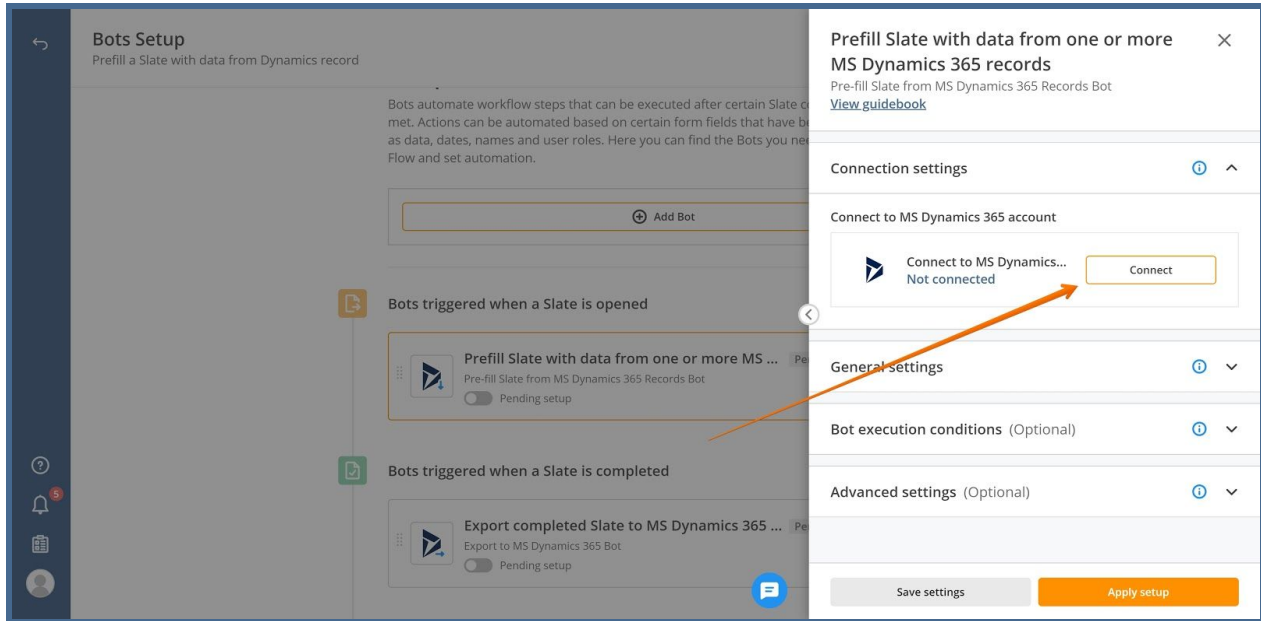


6. Go to Microsoft Integrations and install the Pre-fill MS Dynamics 365 Record Bot.

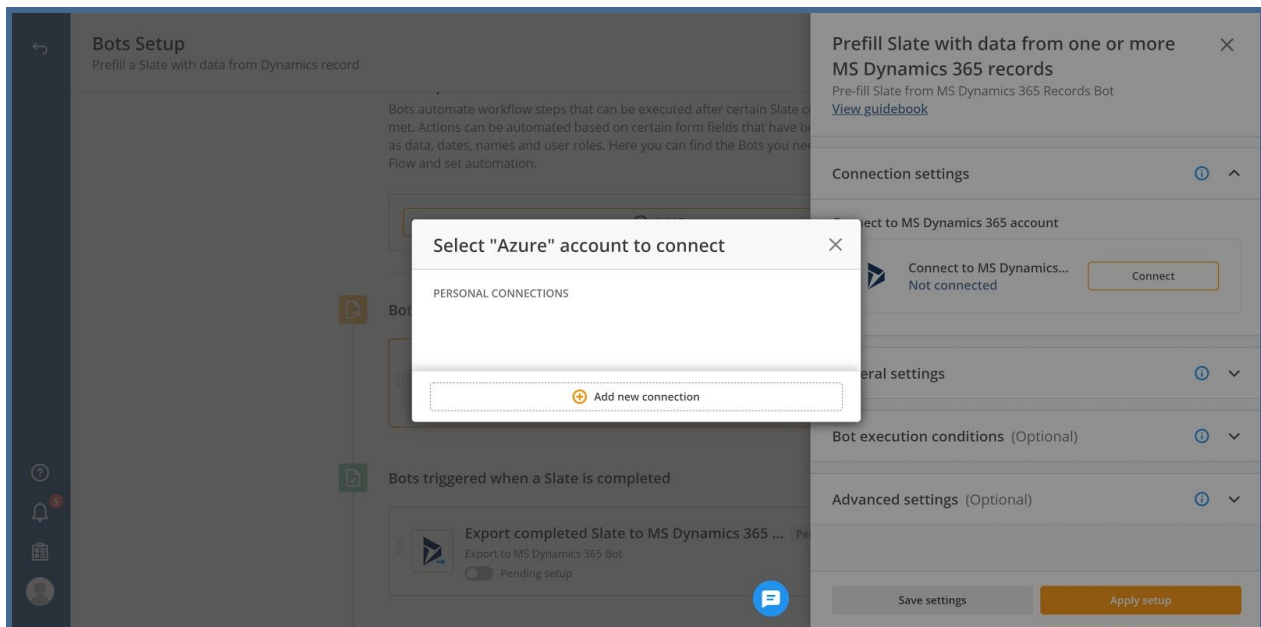


Stage 2. Connect the Dynamics 365 account to the Prefill from Dynamics 365 bot

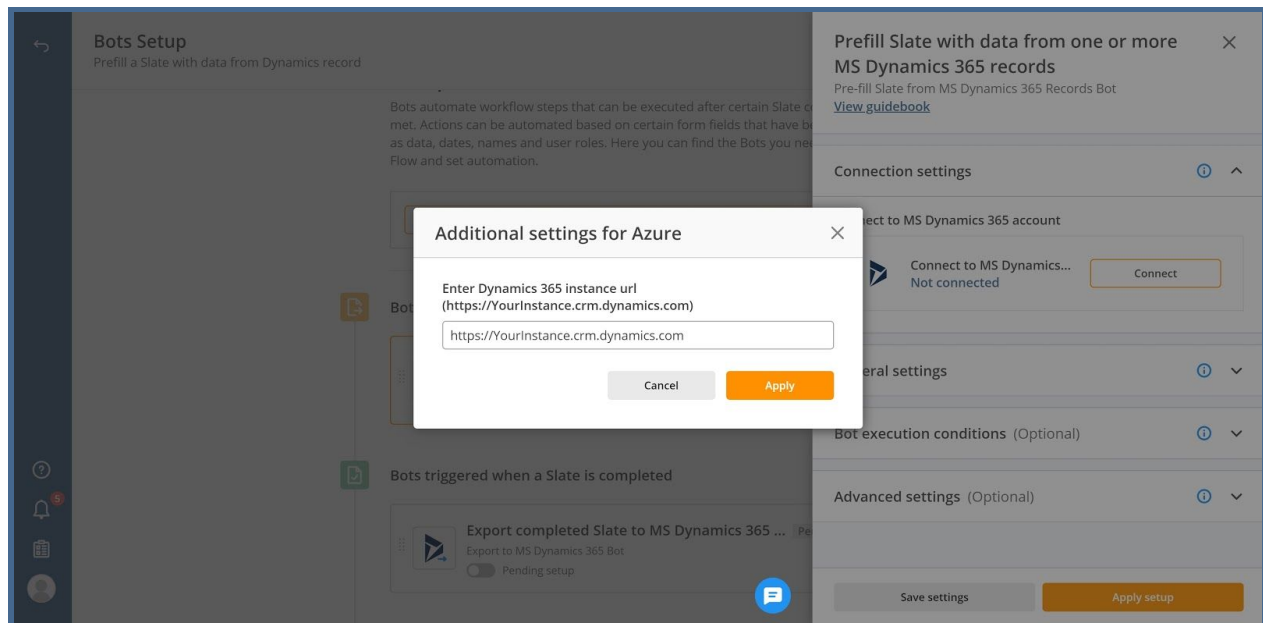
7. Connect your Dynamics 365 account.



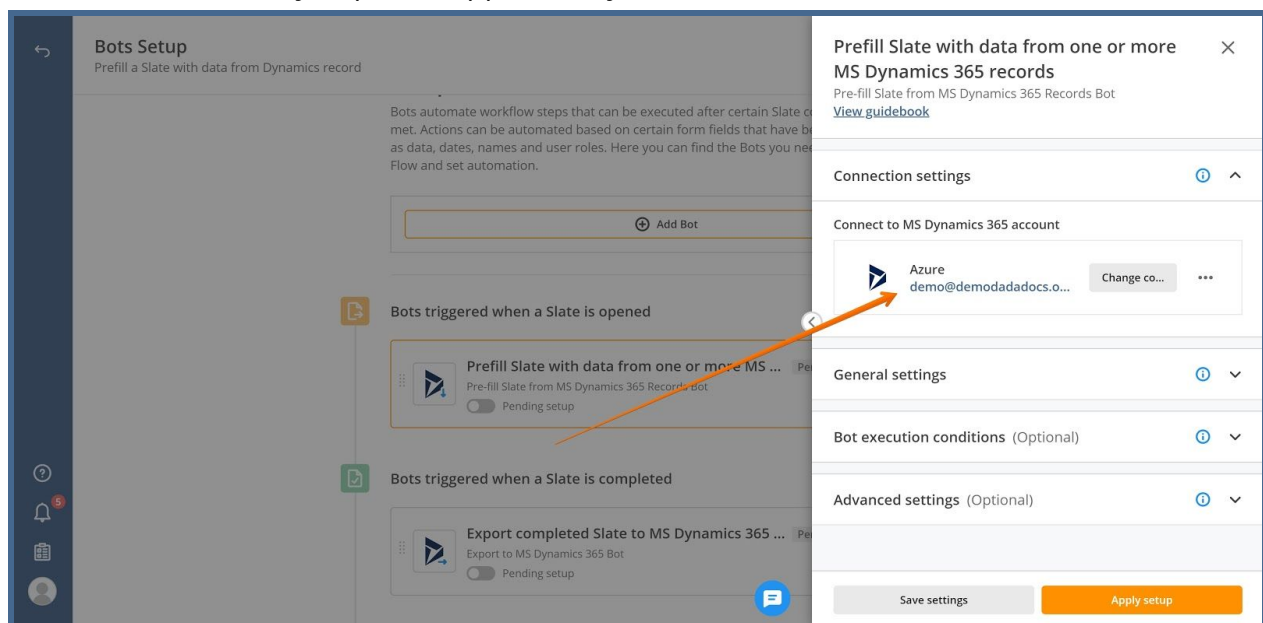
Click **Add new connection**.



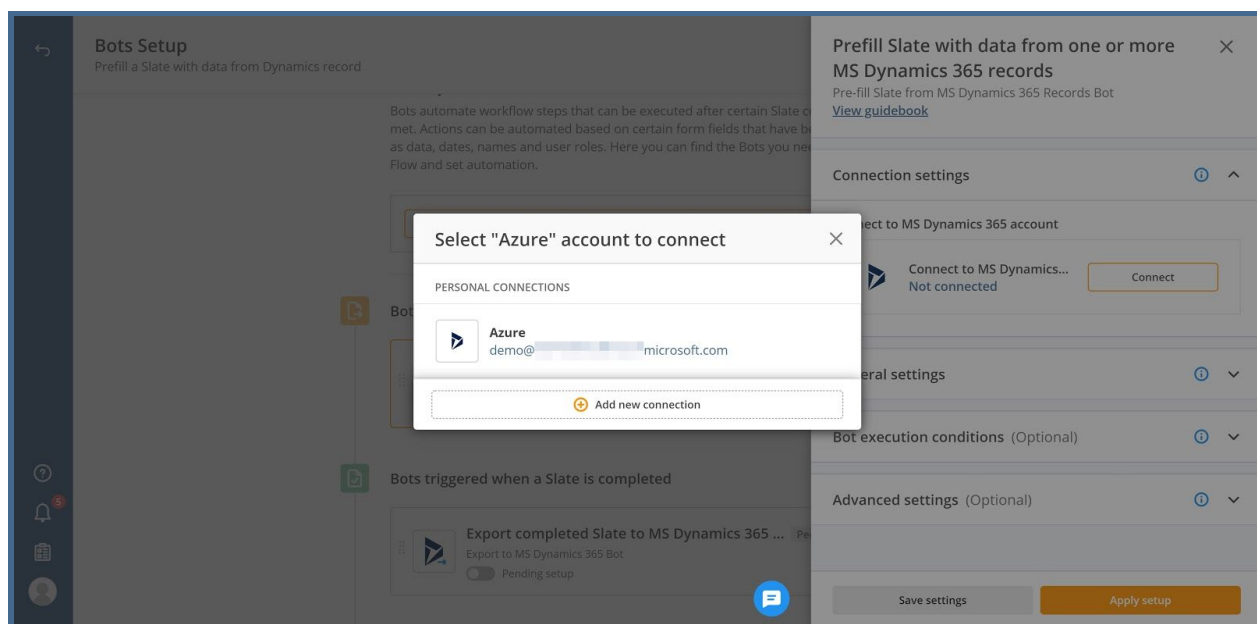
Insert the URL to your Dynamics organization and click **Apply**.



Microsoft Login Page opens. Sign in to your account. After that you'll be redirected back to airSlate. The account you picked appears as your connection.

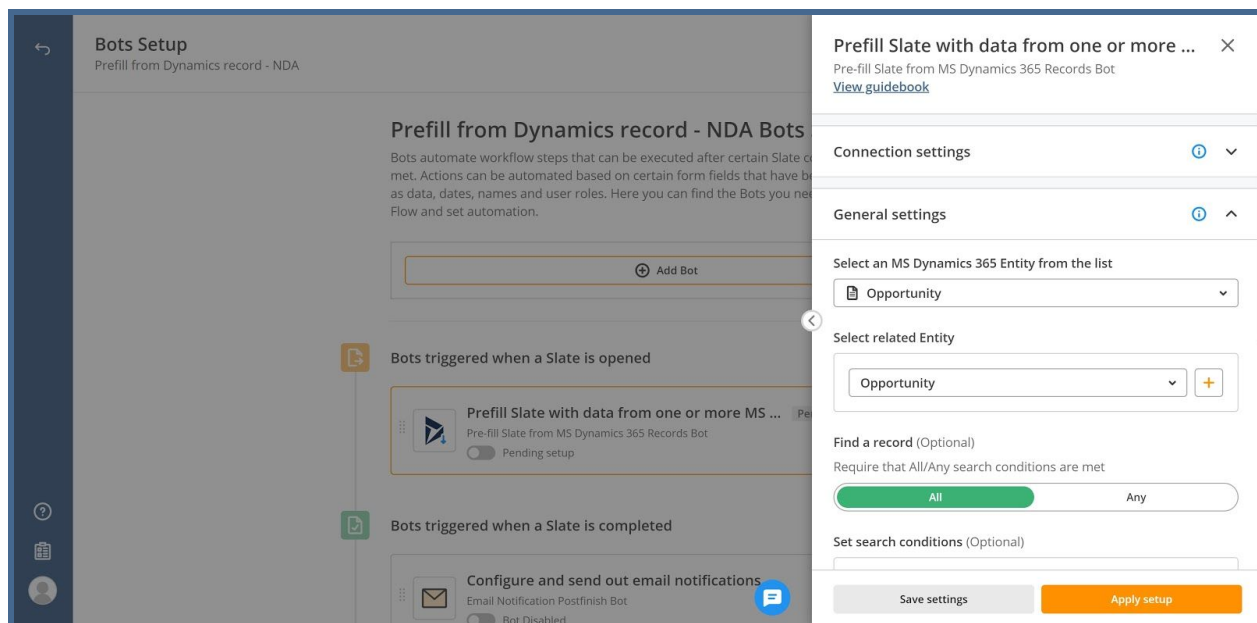


Or simply pick an account you've connected previously.

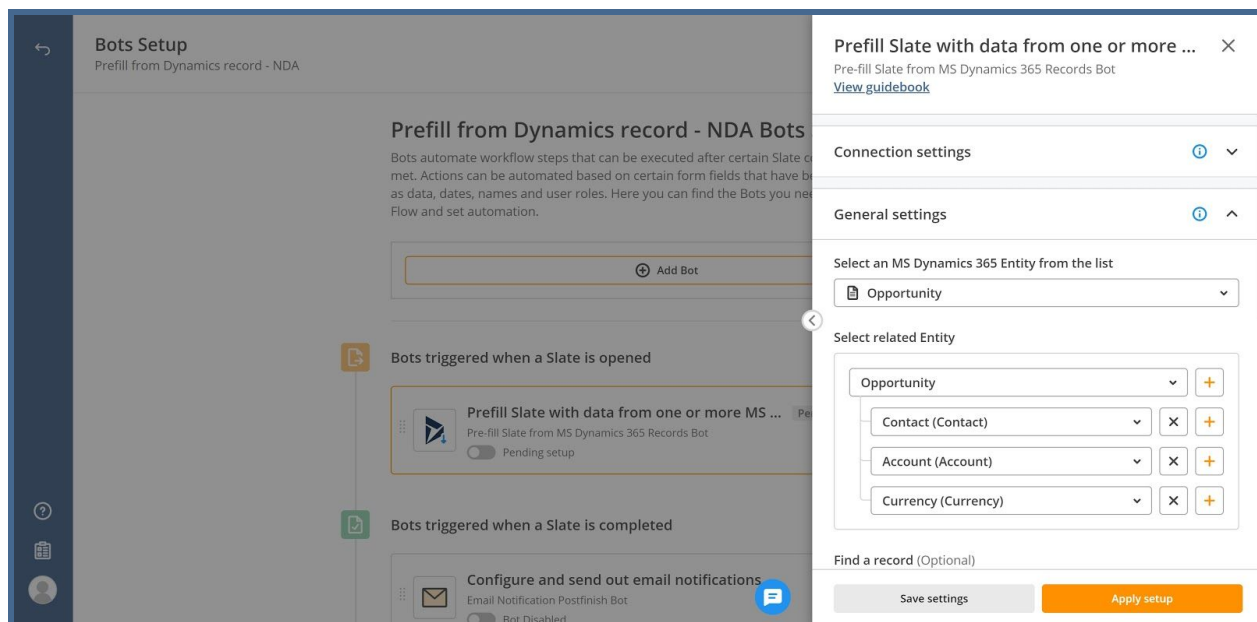


8. Select the Dynamics entity - the type of record to pre-fill a slate from (i.e. Contact, Opportunity, Account).

All entities are listed in the dropdown for your convenience.

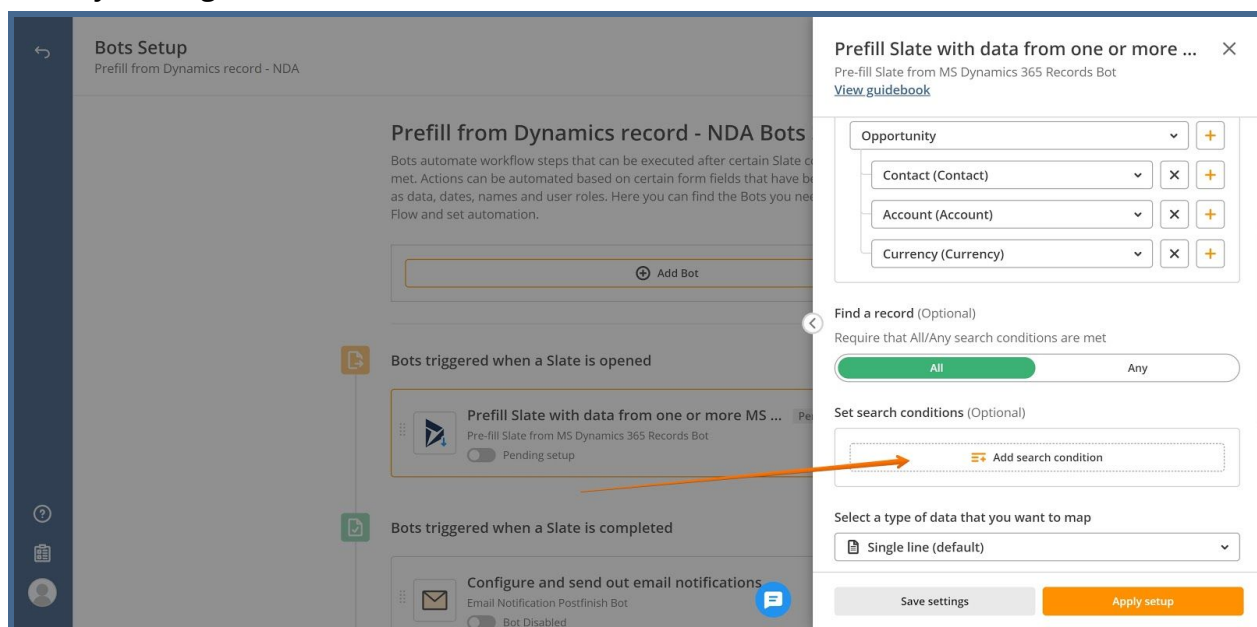


If necessary, select the related entities.



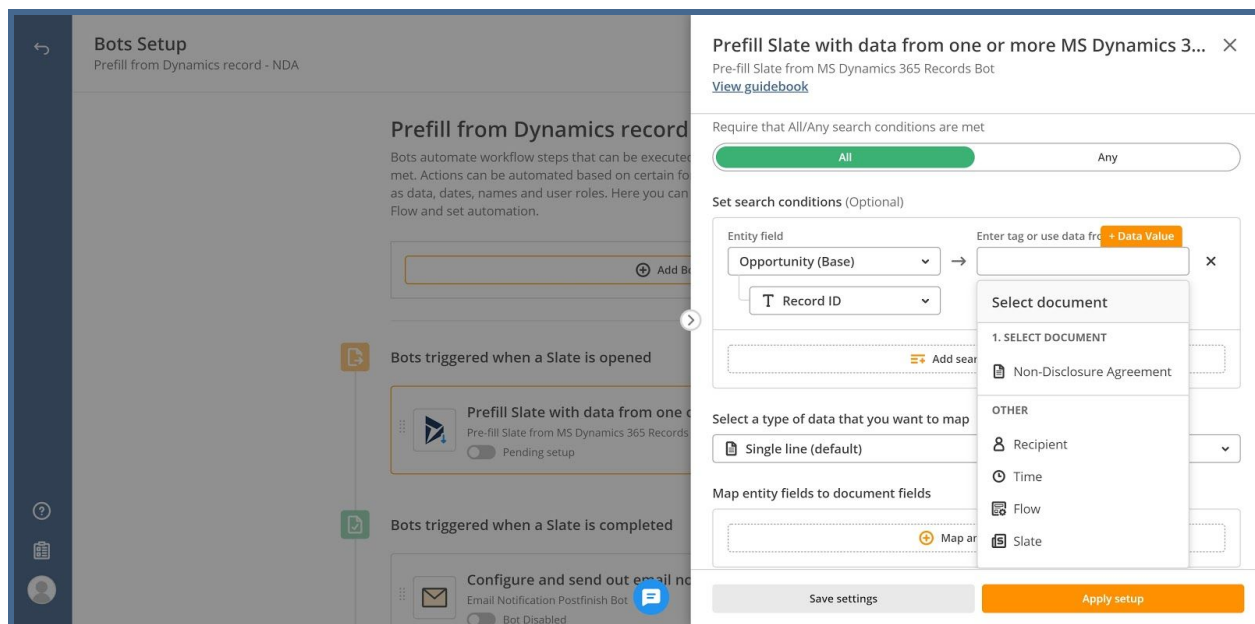
9. Identify the record to retrieve data from as described in *Setup Bots: General settings - Find a record*.

Start by clicking **Add search condition**.

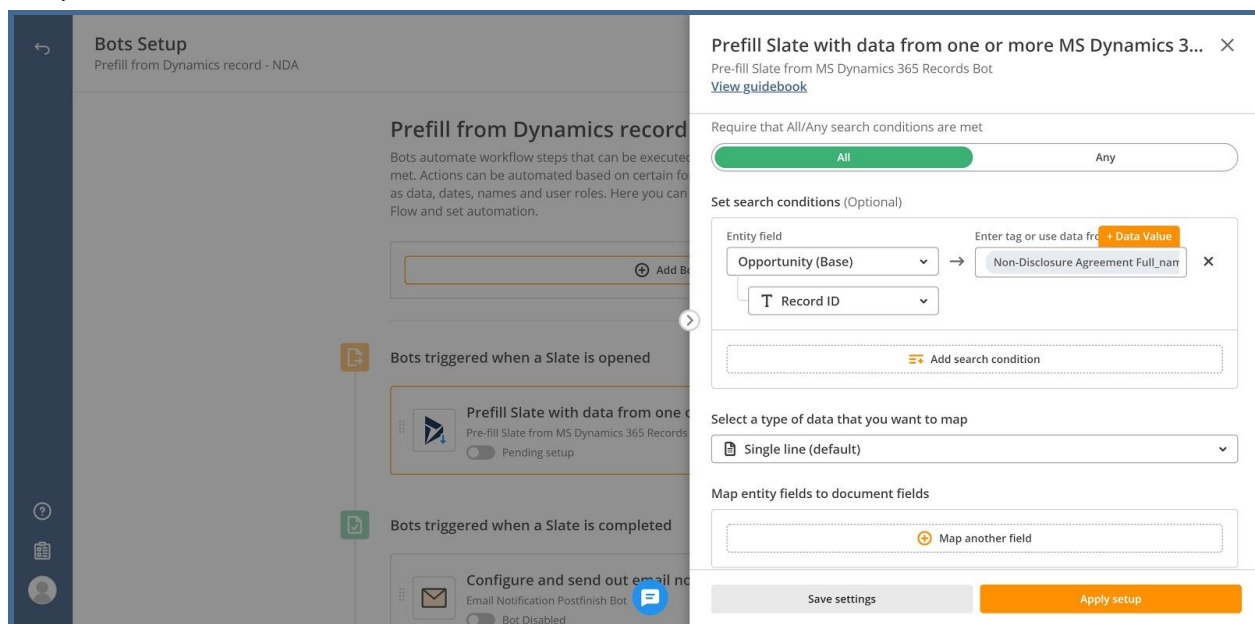


Select the **Entity field** from the dropdown, then select the **Document field** from the other dropdown under the name of your document.

This is the bot that allows you to use identifiers besides the document fields. Click **Data values** to select a document field or another airSlate object.



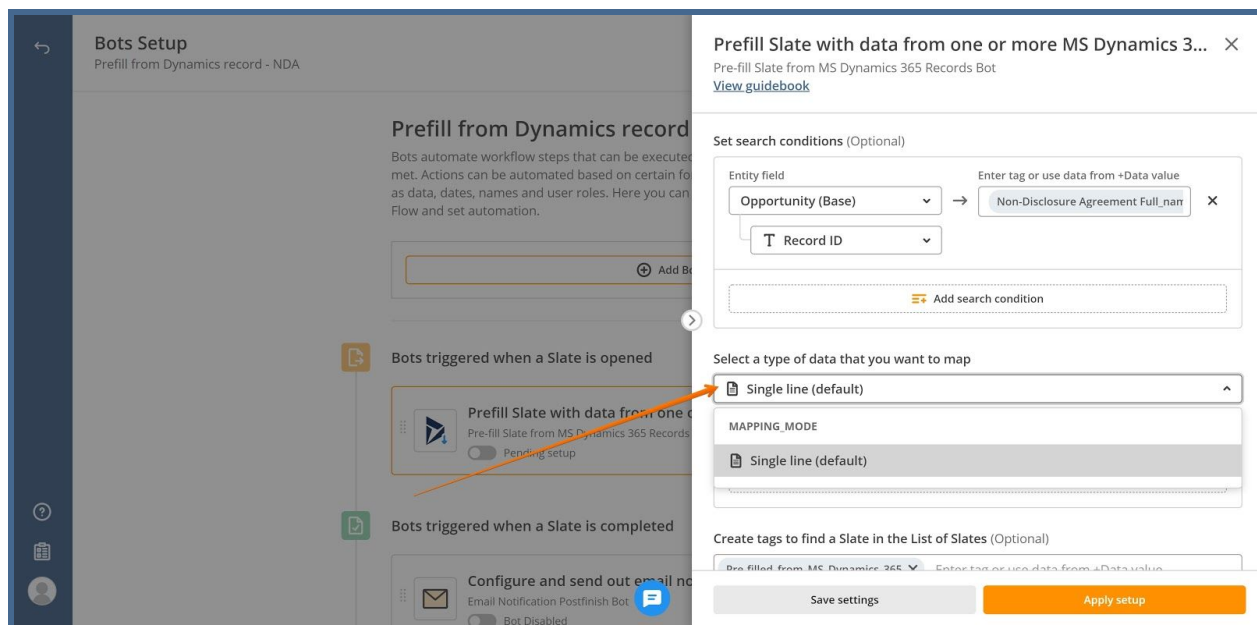
Select the name of the document to go to document fields, or use one of the other options: Recipient, Time, Flow, or Slate.



Feel free to add as many identifying values as you want. To do so, just click **Add search condition** and repeat the matching.

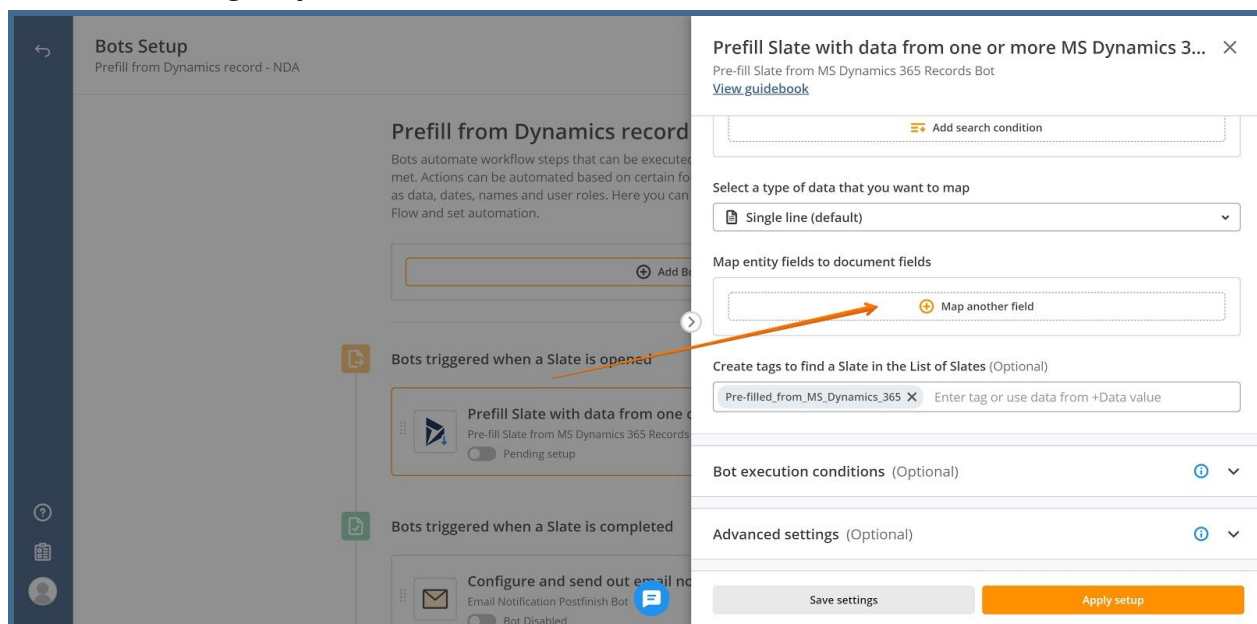
Note: if the lookup finds more than one matching record, none of the records can be updated.

10. Set what type of data you'd like to map: simple text (*Single line*) or table values (*Table*, if your entity/document contains one).



11. Map the record fields with fillable fields in the document as described in *Setup Bots: General Settings - Mapping*.

Start with clicking **Map another field**.



Select the **Entity field** to transfer value from, then select the **Document field** to transfer value into.

Bots Setup
Prefill from Dynamics record - NDA

Prefill from Dynamics record
Bots automate workflow steps that can be executed when a condition is met. Actions can be automated based on certain fields such as data, dates, names and user roles. Here you can configure the bot flow and set automation.

Bots triggered when a Slate is opened

Prefill Slate with data from one or more MS Dynamics 365 Records
Pre-fill Slate from MS Dynamics 365 Records Bot
Pending setup

Bots triggered when a Slate is completed

Configure and send out email notification
Email Notification Postfinish Bot
Bot Disabled

Prefill Slate with data from one or more MS Dynamics 365 Records
Pre-fill Slate from MS Dynamics 365 Records Bot
[View guidebook](#)

Map entity fields to document fields

Entity field: Opportunity → Document field: Non-Disclosure Agree...
Entity field: Actual Close Date → Document field: Date_1

Create tags to find a Slate in the List of Slates (Optional)
Pre-filled_from_MS_Dynamics_365 X Enter tag or use data from +Data value

Save settings Apply setup

Repeat the mapping for every field.

Bots Setup
Prefill from Dynamics record - NDA

Prefill from Dynamics record
Bots automate workflow steps that can be executed when a condition is met. Actions can be automated based on certain fields such as data, dates, names and user roles. Here you can configure the bot flow and set automation.

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Bot Disabled

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Pre-fill Slate from MS Dynamics 365 Records Bot
[View guidebook](#)

Map entity fields to document fields

Entity field: Contact → Document field: Non-Disclosure Agree...
Entity field: Full Name → Document field: Full_name

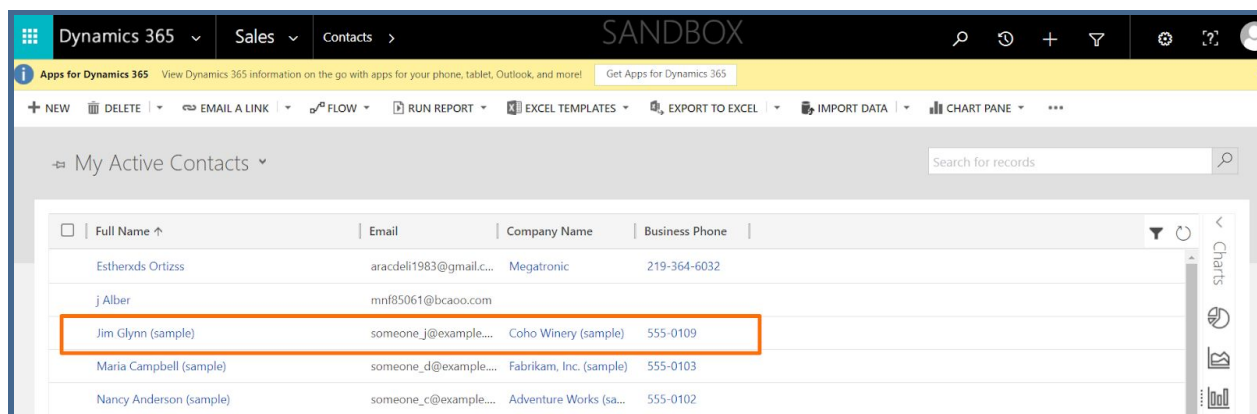
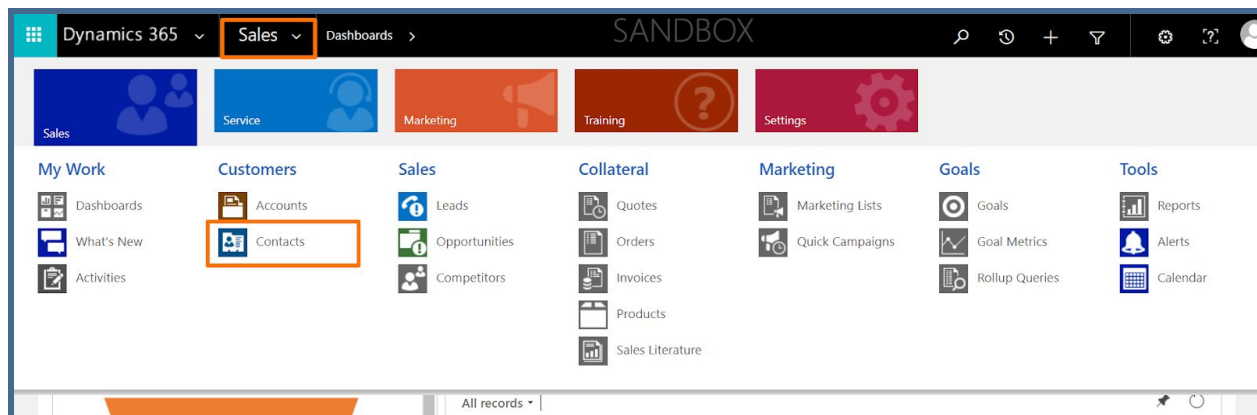
Create tags to find a Slate in the List of Slates (Optional)
Pre-filled_from_MS_Dynamics_365 X Enter tag or use data from +Data value

Save settings Apply setup

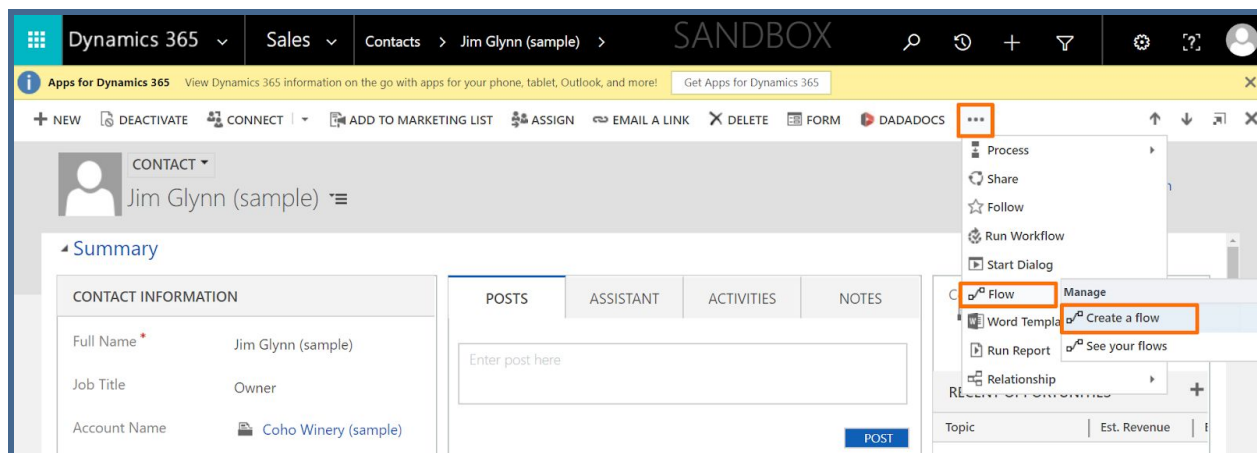
Click **Apply setup** when you're done.

Stage 3: Create the MS flow with the airSlate Flow from Stage 1

12. Go to Dynamics 365 and select an entity you've specified in the airSlate Flow. Then, select any record of that entity type.



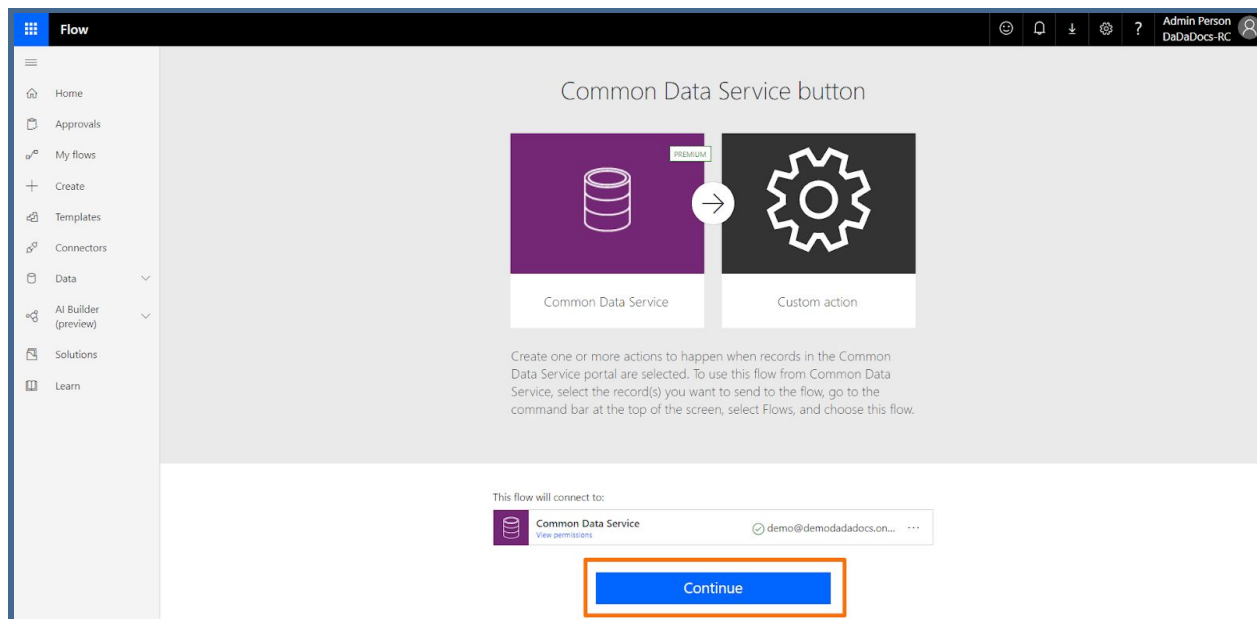
13. In the command bar select triage. Click Flow - Create Flow in the dropdown.



You'll be redirected to the MS Flow.

14. Click **Continue** at the start of the flow.

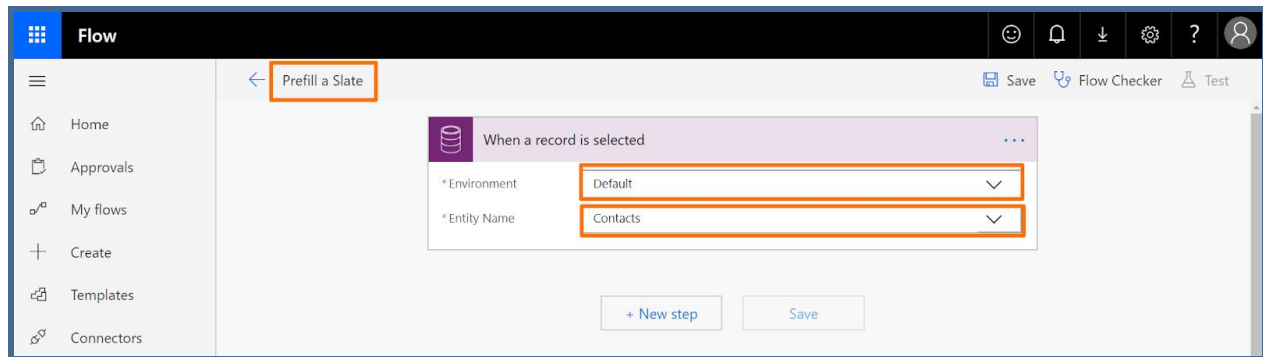
This authorizes the Common Data Service connector to create a button for the entities you've started from (Contacts in this case).



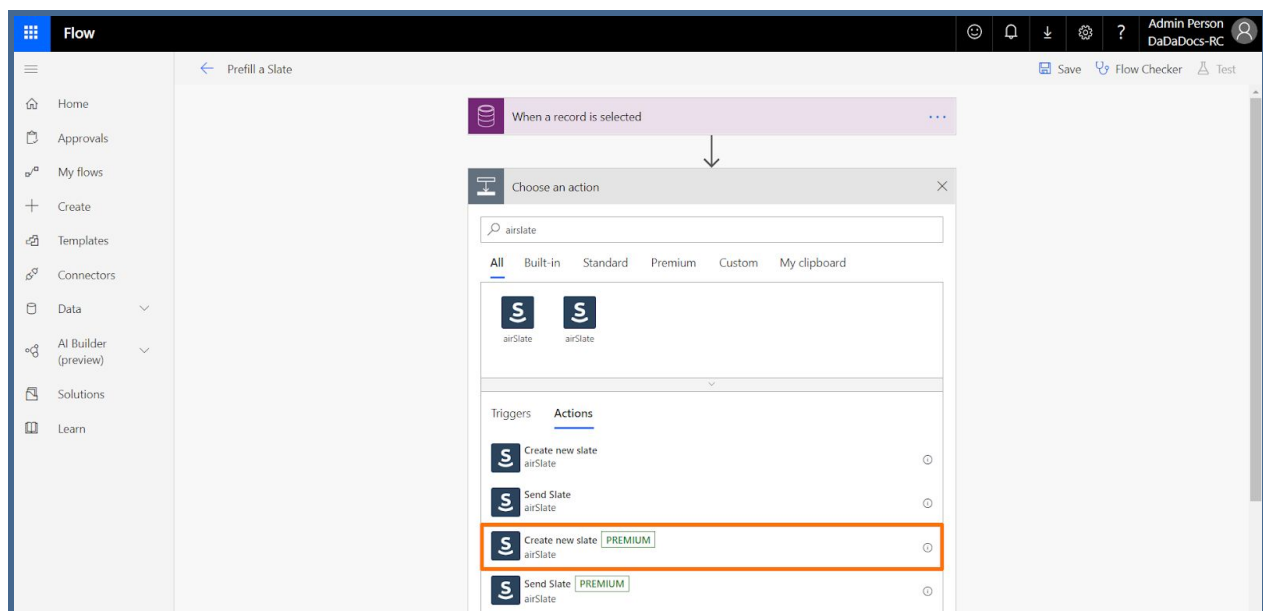
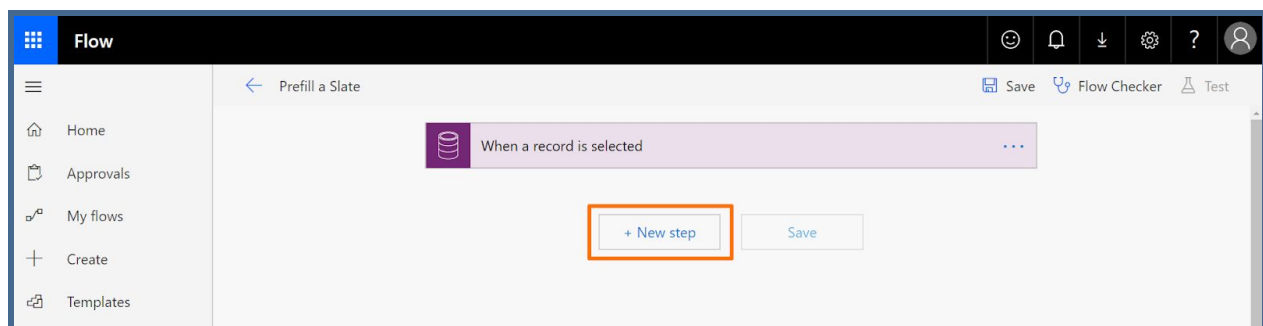
15. Select the environment and entity name, they should be available from the dropdown menus.

The environment is your organization in Dynamics 365, the entity name is the type of entities that should work with this flow.

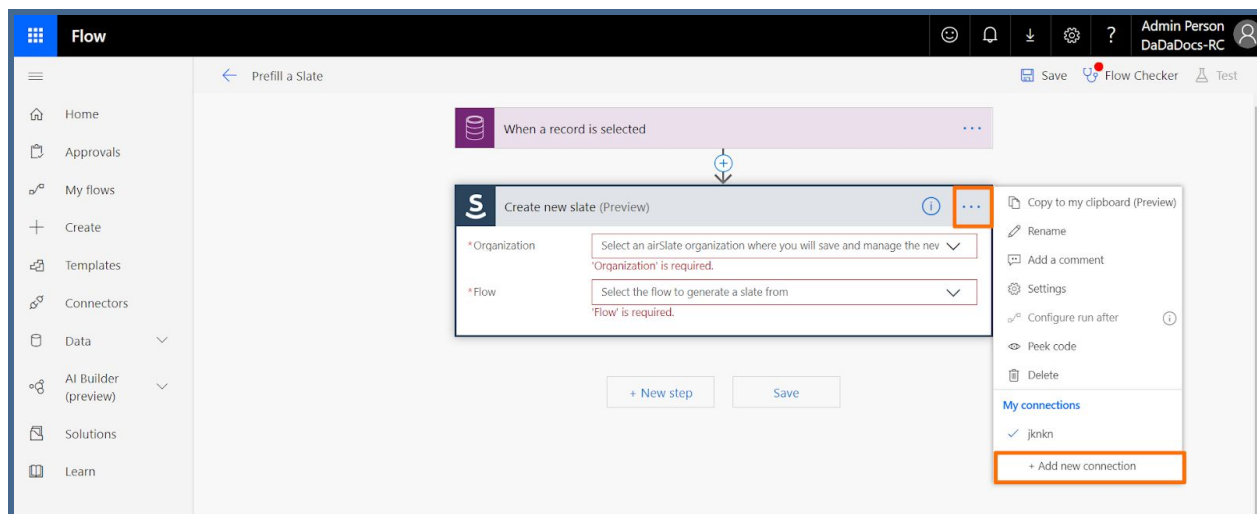
Name the flow - this will also be a name of your button in Dynamics 365.



16. Add a New step. Select the airSlate connector, then click on the action Create a new slate.

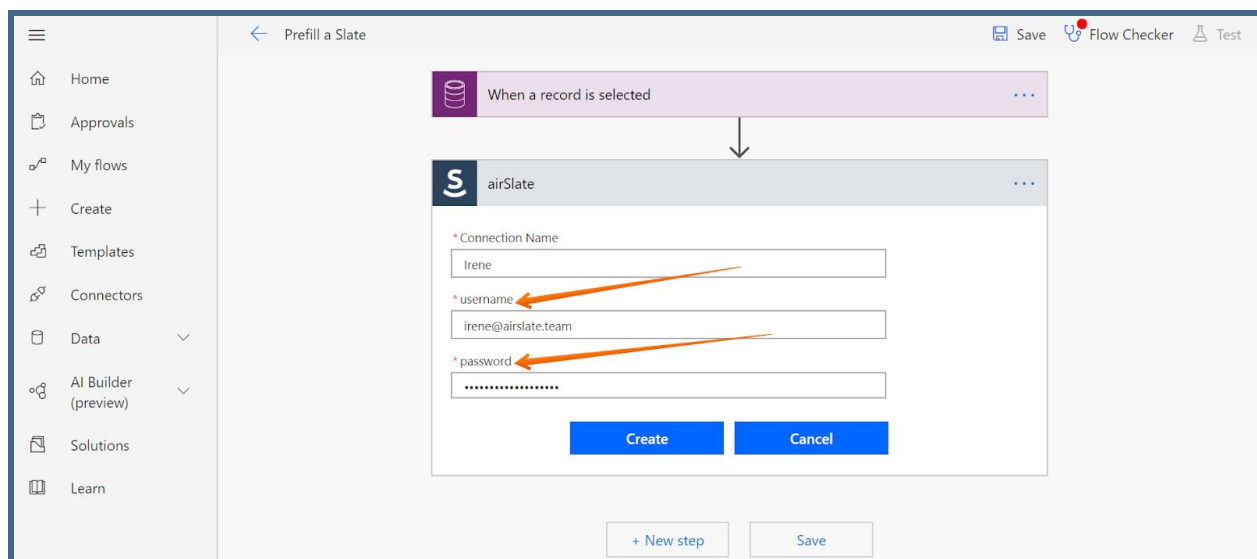


17. Click the triage, then Add new connection in the action menu.



18. Add the credentials to your airSlate organization where you created the flow. Name the connection. Click Create.
Username: type your email address here
Password: type your password.

The credentials will only be used to access the flow and nowhere else.



19. Select your airSlate organization and the flow you created during Stage 1. In Dynamics record ID, go to Dynamic content section and select an identifier for the entity in the trigger (Contact in this example).

The screenshot shows the airSlate workflow editor. The first step is a trigger titled "When a record is created" with the following configuration:

- *Environment: pdfiller1
- *Entity Name: Contacts
- *Scope: Organization

The second step is "Create new slate (Preview)". The configuration for this step is:

- *Organization: srgkas1
- *Flow: My gs flw-dyn Flow
- Dynamics record id: (empty field)

The "Dynamic content" panel is open on the right, showing a list of fields to be added to the slate:

- Callback Number: Type a callback phone number for this contact.
- Children's Names: Type the names of the contact's children for reference in...
- Company Name: Select the parent account or parent contact for the cont...
- Company Name Type: Select the parent account or parent contact for the cont...
- Company Phone: Type the company phone of the contact.
- Contact: Unique identifier of the contact.
- Created By: Shows who created the record.
- Created By Type: Shows who created the record.
- Created On: Shows the date and time when the record was created. T...

Buttons at the bottom include "+ New step" and "Save".

This screenshot shows the same workflow editor as the previous one, but with the "Dynamics record id" field in the "Create new slate (Preview)" step populated with the "Contact" field from the dynamic content list.

The trigger "When a record is created" remains the same:

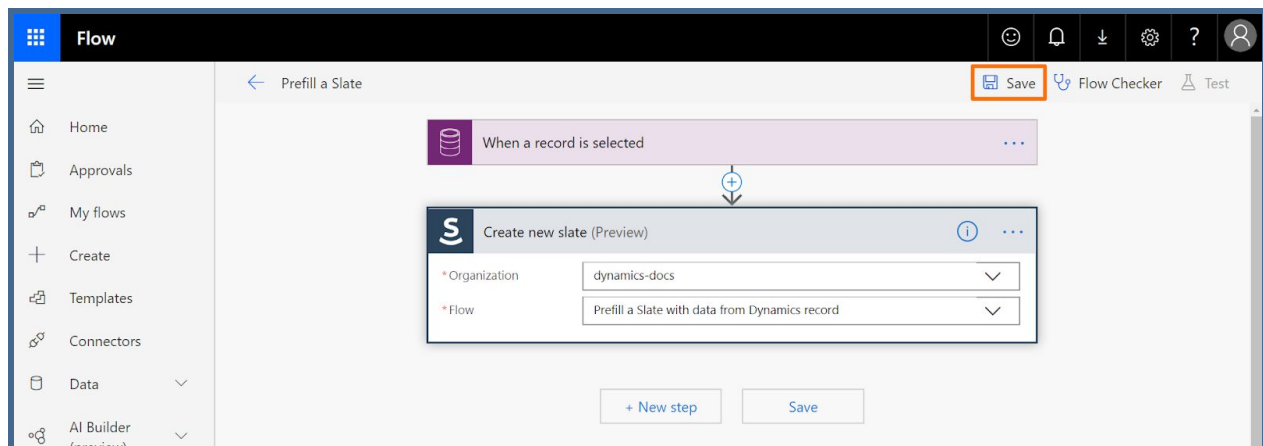
- *Environment: pdfiller1
- *Entity Name: Contacts
- *Scope: Organization

The "Create new slate (Preview)" step configuration is now:

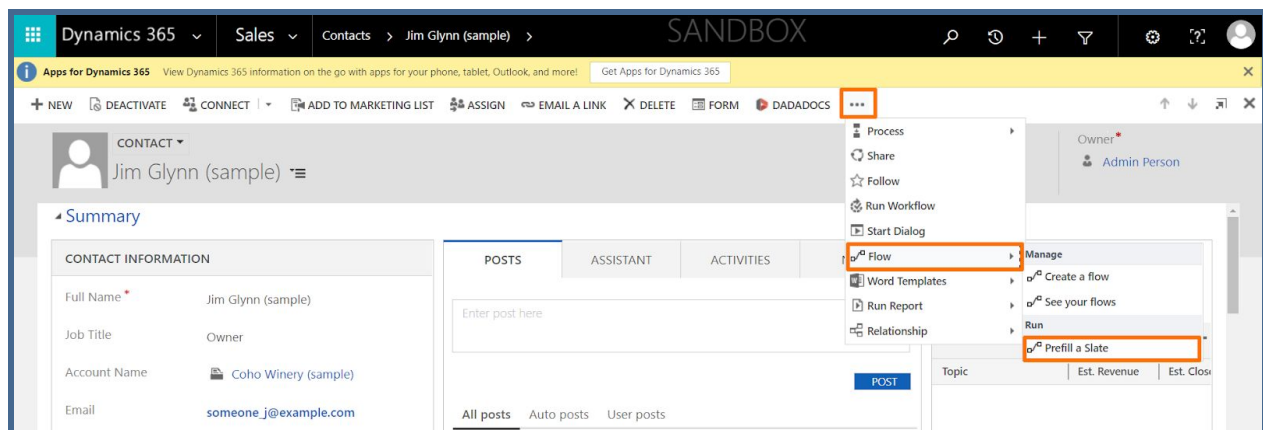
- *Organization: srgkas1
- *Flow: My gs flw-dyn Flow
- Dynamics record id: Contact x

The "Dynamic content" panel is no longer visible. Buttons at the bottom include "+ New step" and "Save".

20. Click Save.



Now, you can check the MS Dynamics 365 record. Refresh the record page, go to triage in the command bar, click on the Flow and you'll notice your Prefill a Slate button in the dropdown menu.



Click the button to create a Slate pre-filled with data from this record.