airSlate for MS Dynamics 365 User Guide

Requirements:

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

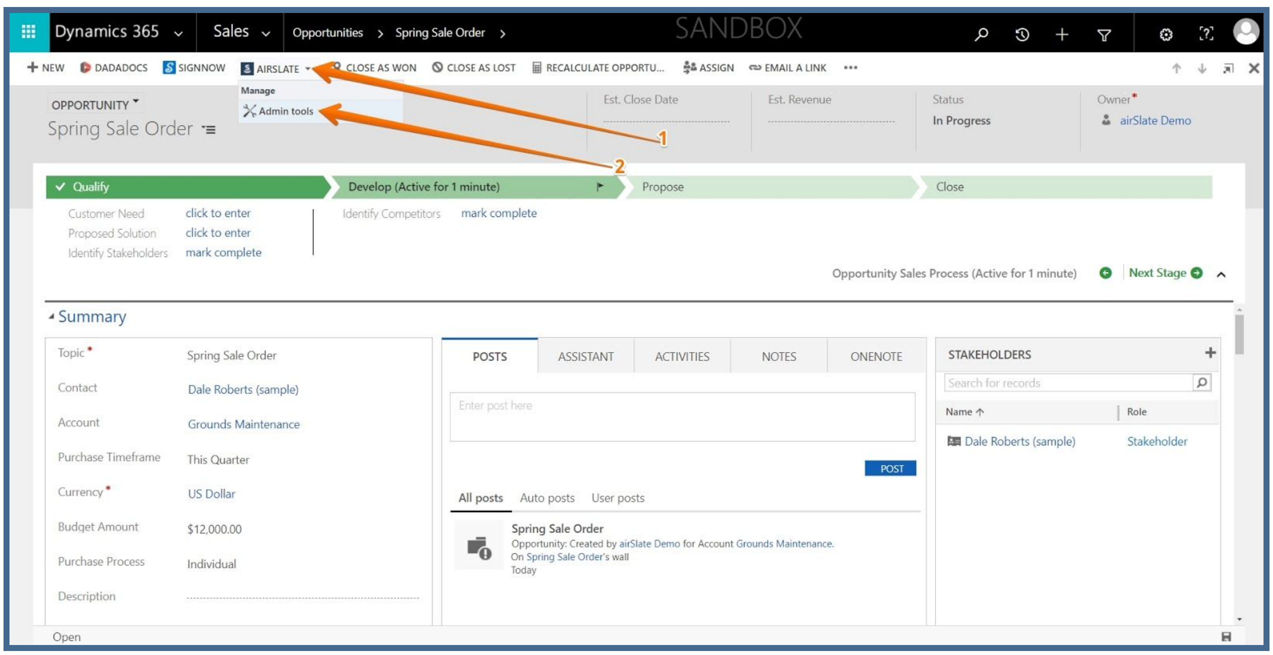
airSlate Admin Tools in MS Dynamics 365

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.



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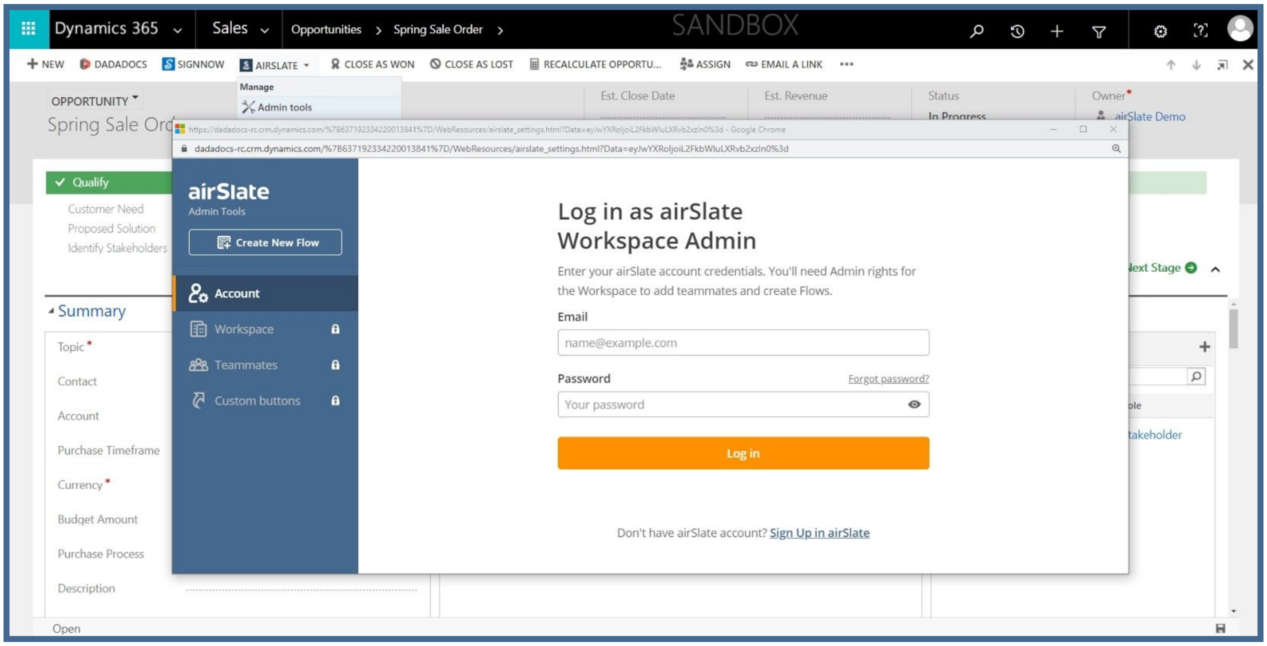
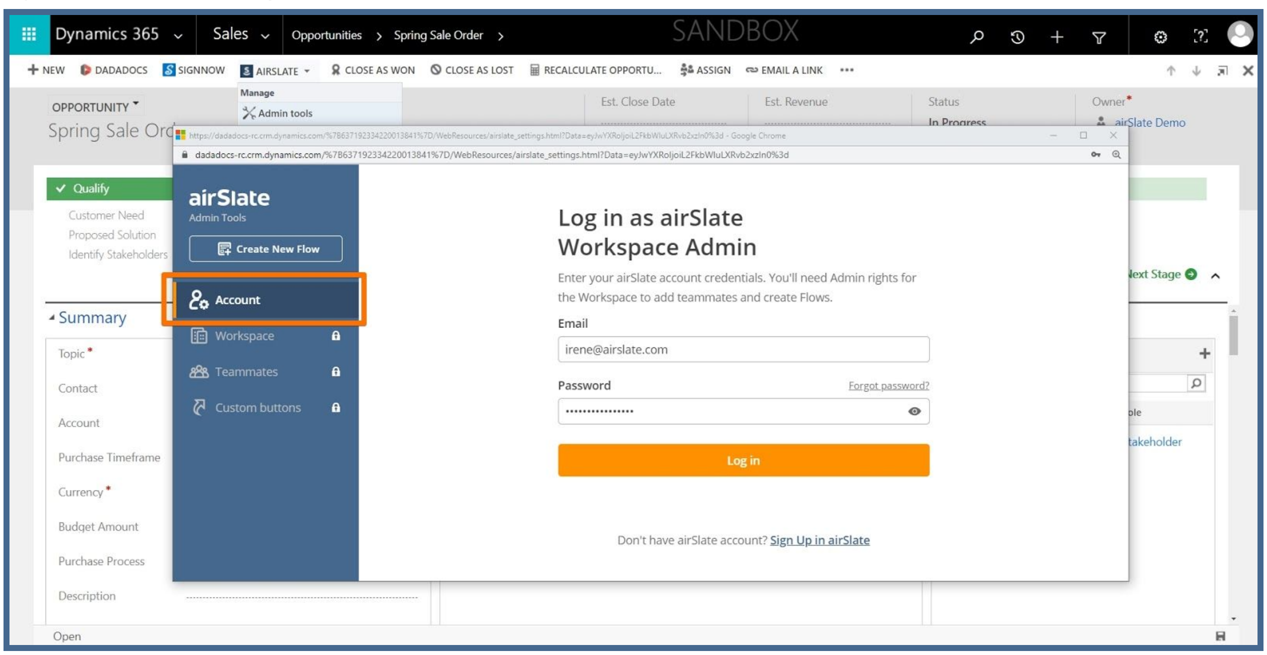


Account

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.

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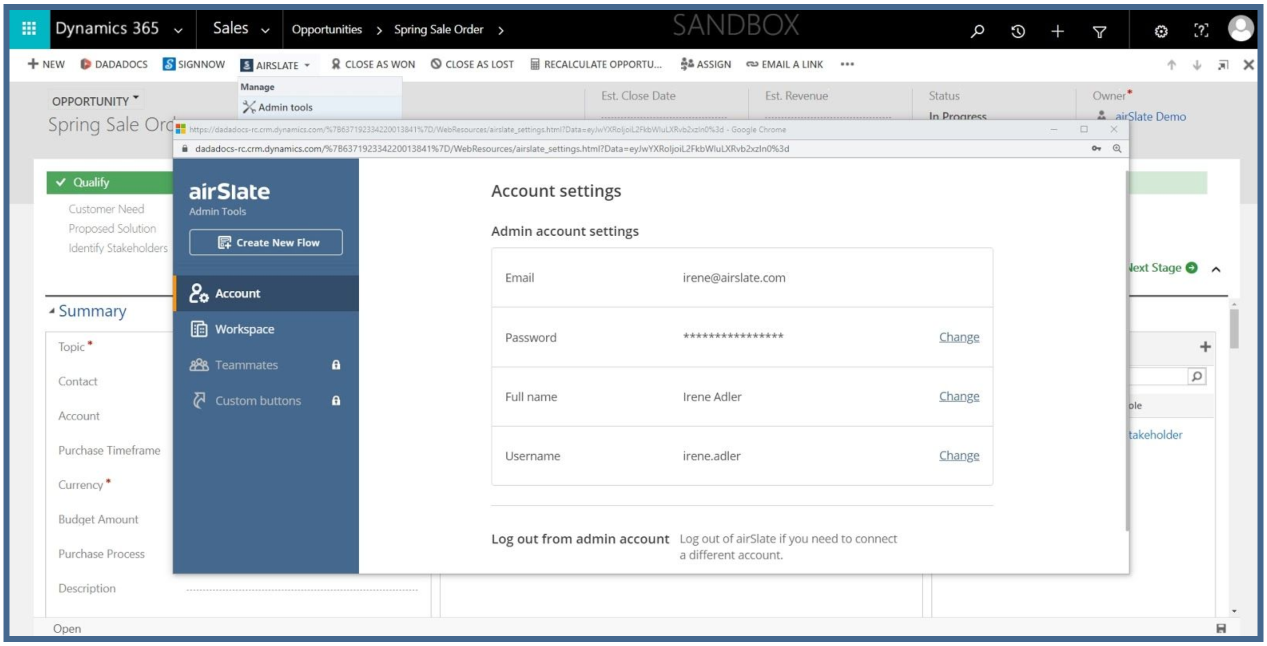
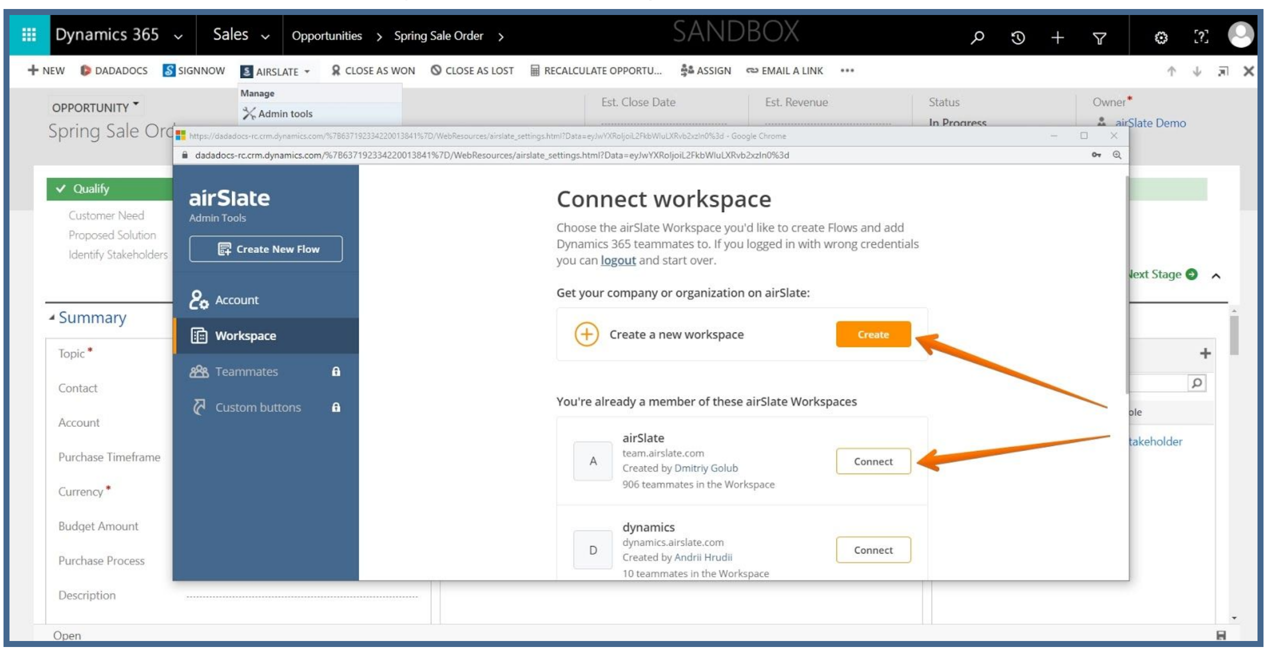


Workspace

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.



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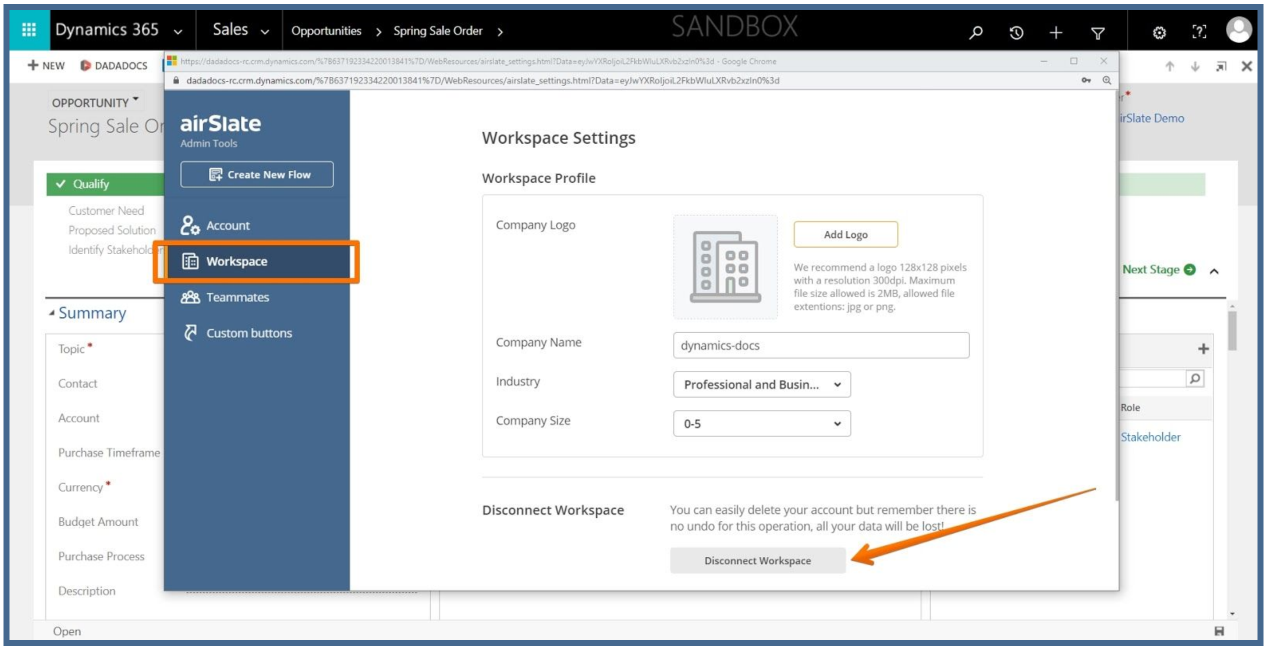
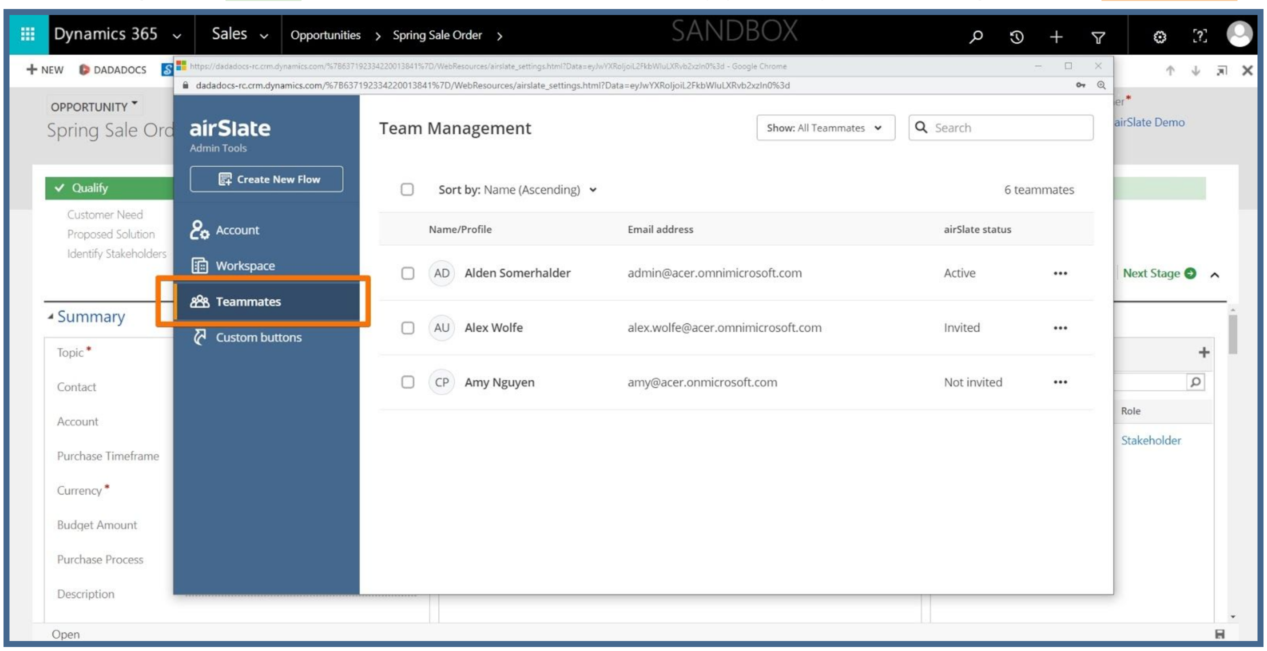


Teammates

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 (triage) next to their airSlate status.

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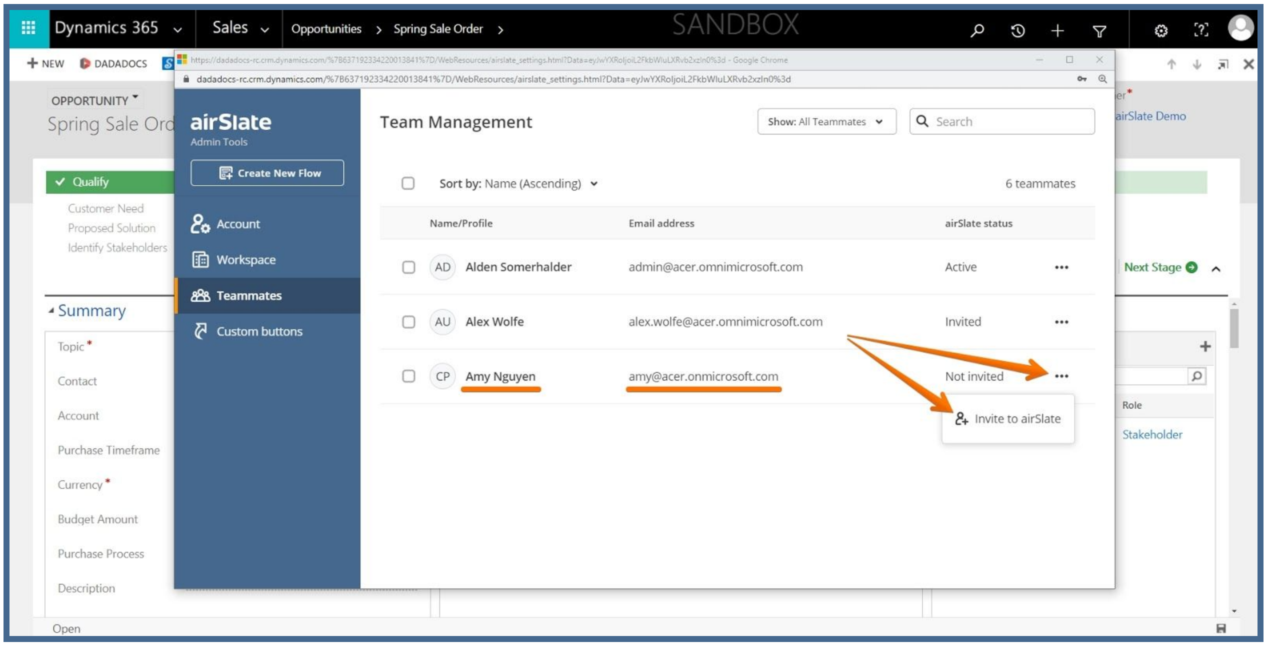
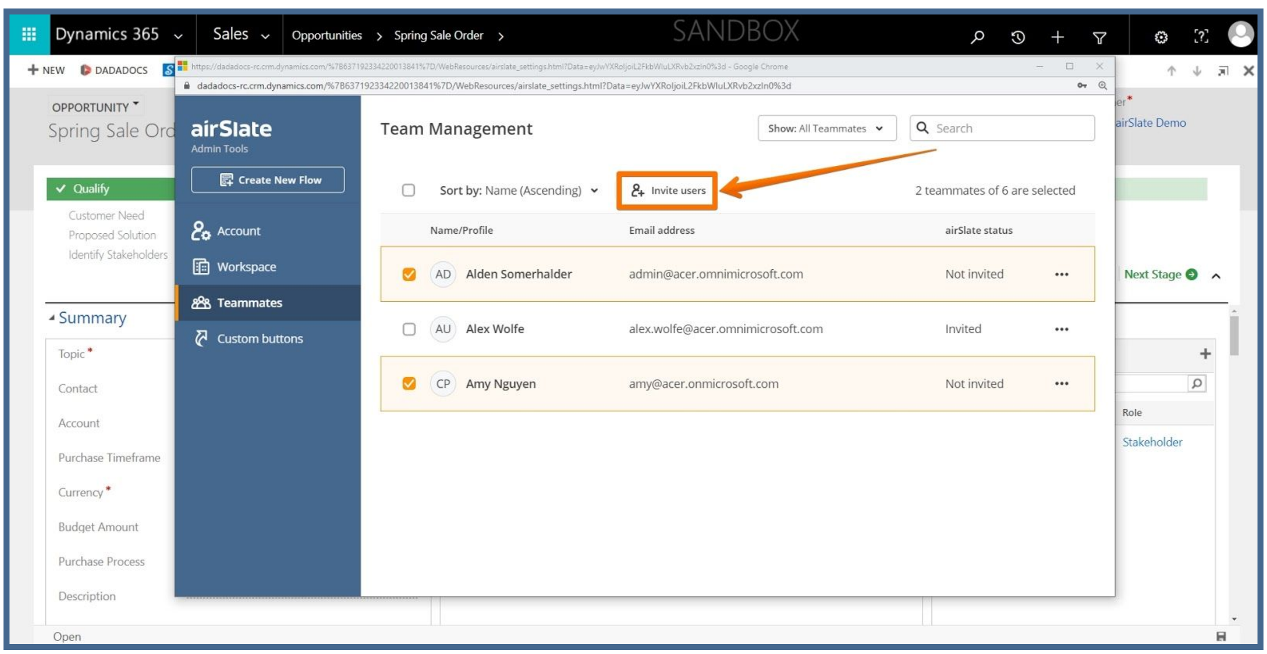


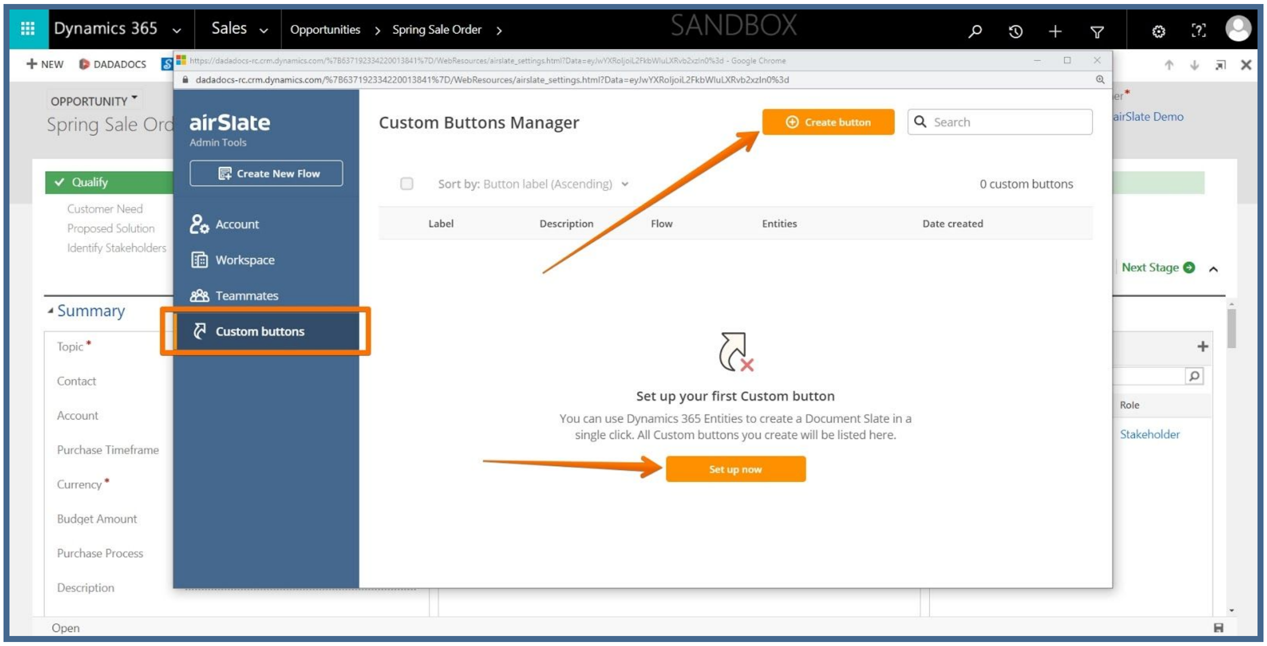
To invite several MS Dynamics 365 users at the same time, check the boxes next to each name and then click **Invite users**. The Invite users button becomes available only after you select at least one teammate for this operation.



Custom buttons

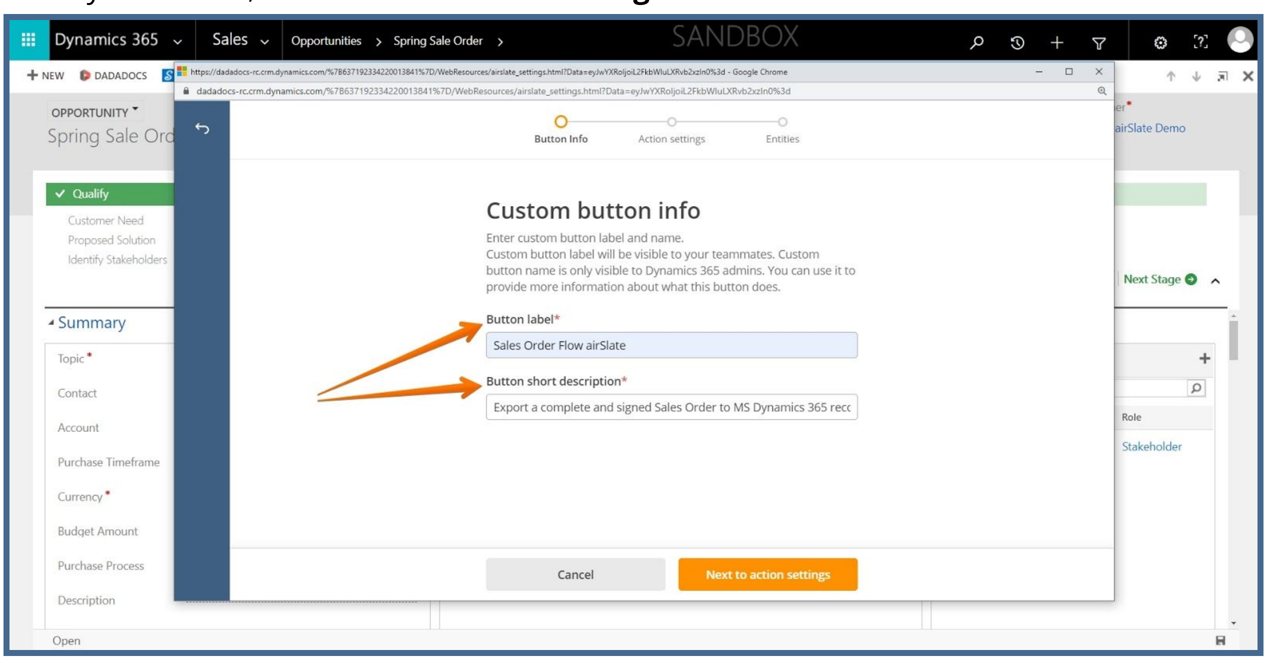
In the Custom buttons section, add custom buttons to MS Dynamics 365 entities and set them up to run specific airSlate Flows.

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**.



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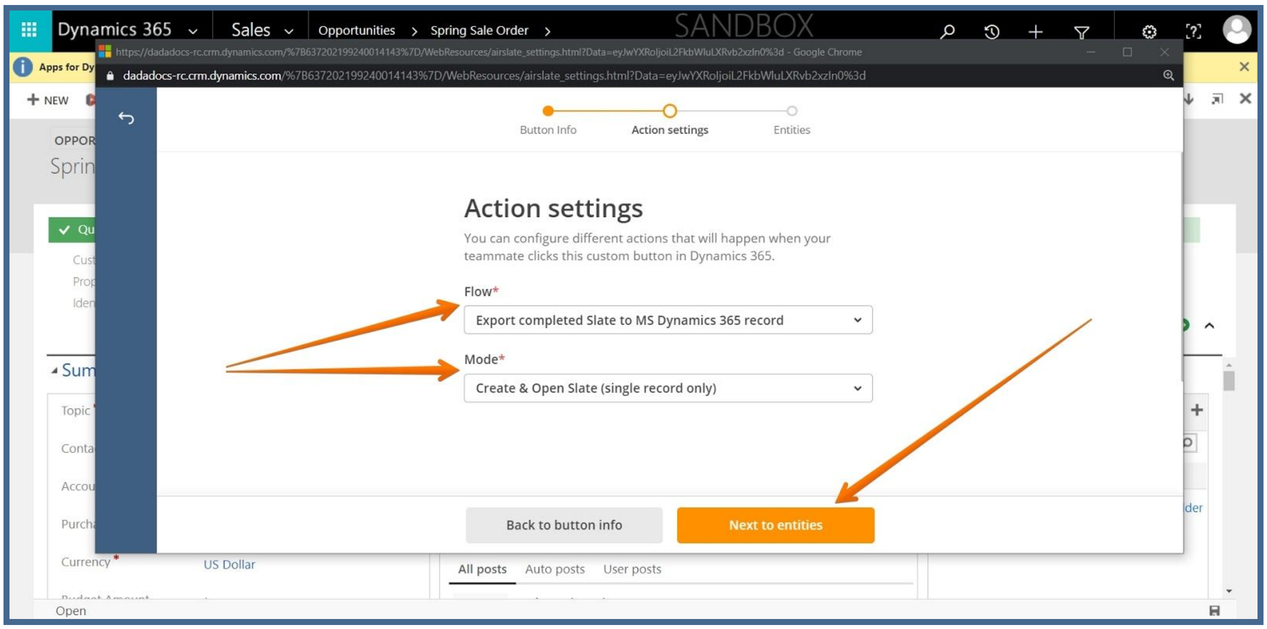
In *Action settings*, select which Flow will be triggered by this button and the mode it will be running in. Remember, you can select only between the Flows in the Workspace you connected previously.

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**.

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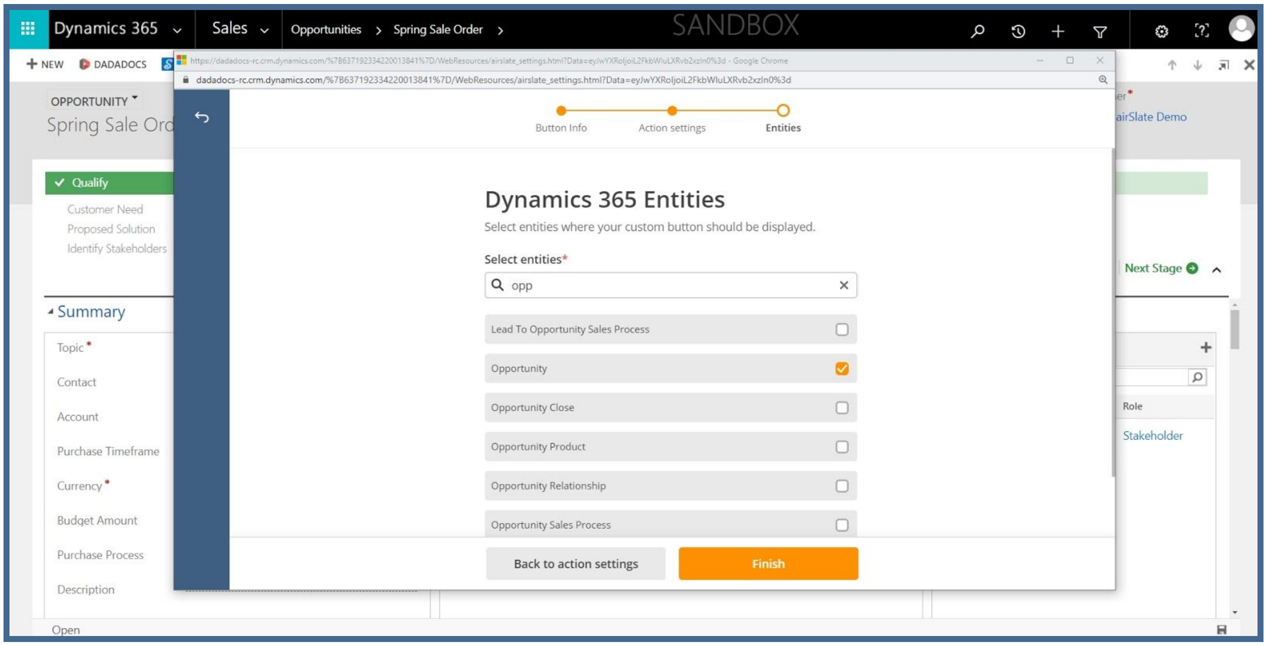
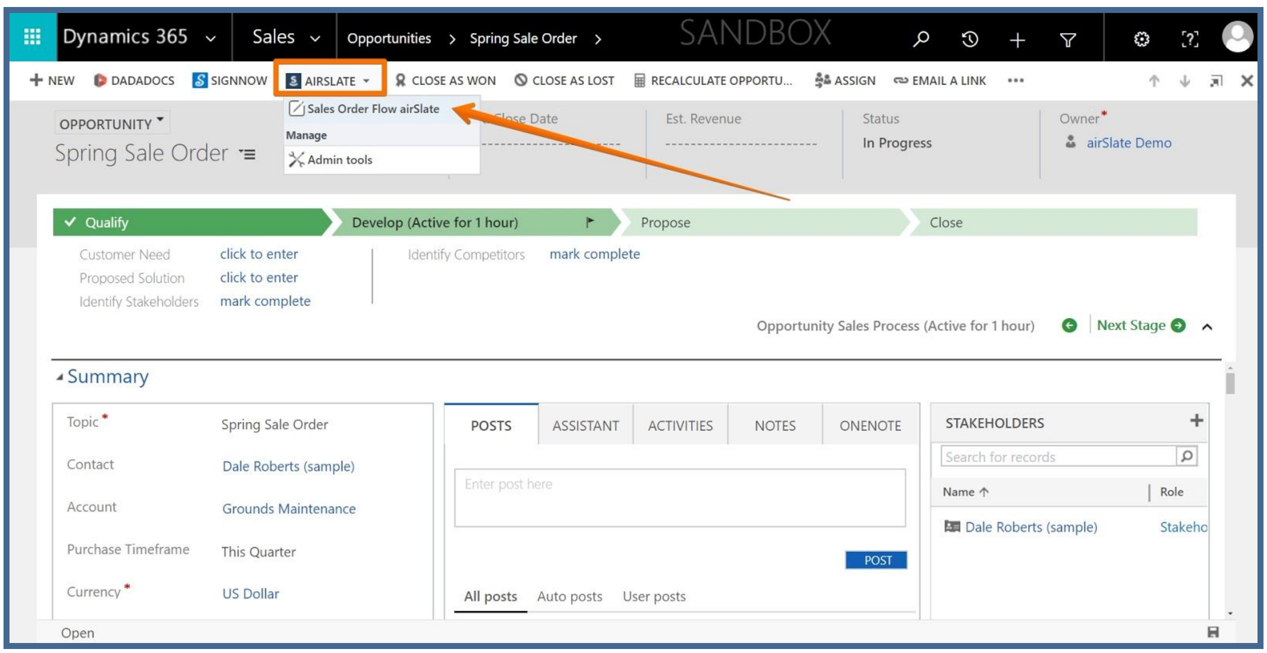


Now you can go to the entity you've selected and check if you can test this button.



Before you begin: basic airSlate Flow settings

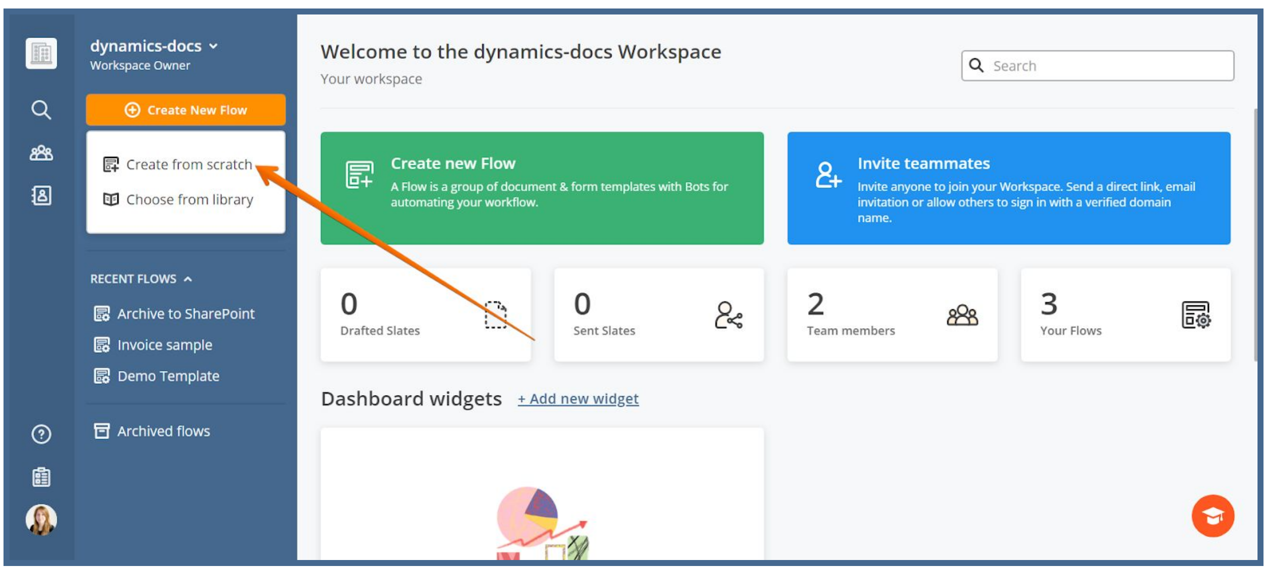
In this article you'll learn how to create automation Flows in airSlate and integrate them with MS Dynamics 365.

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

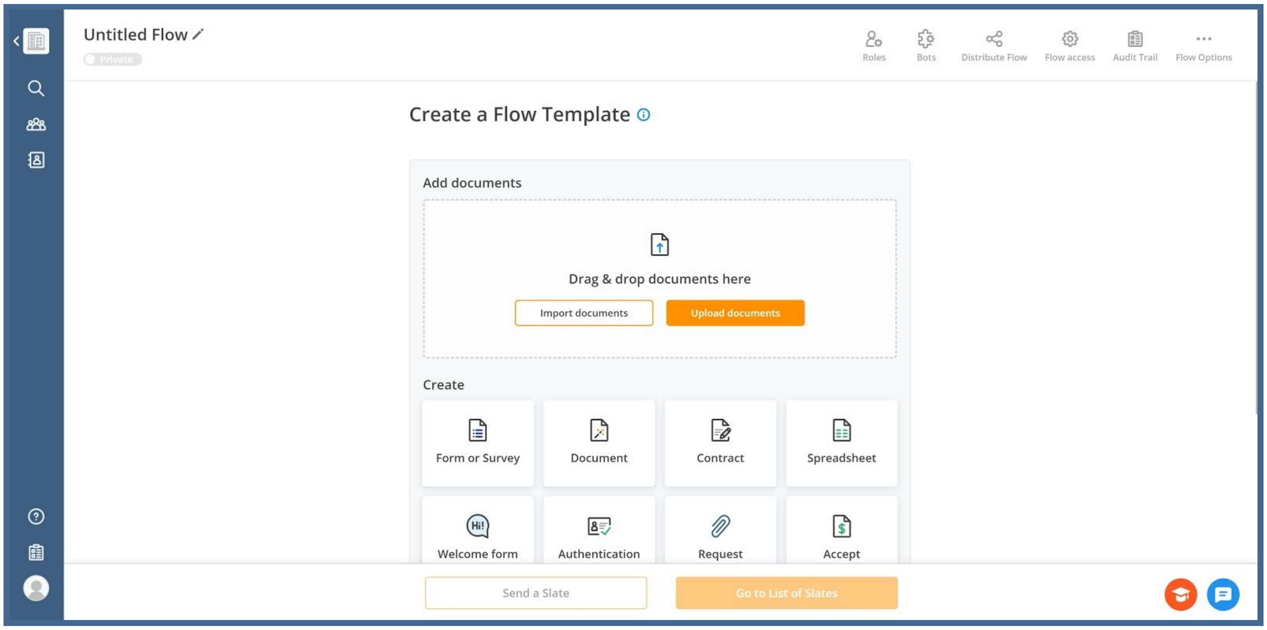
1. Create a new Flow.

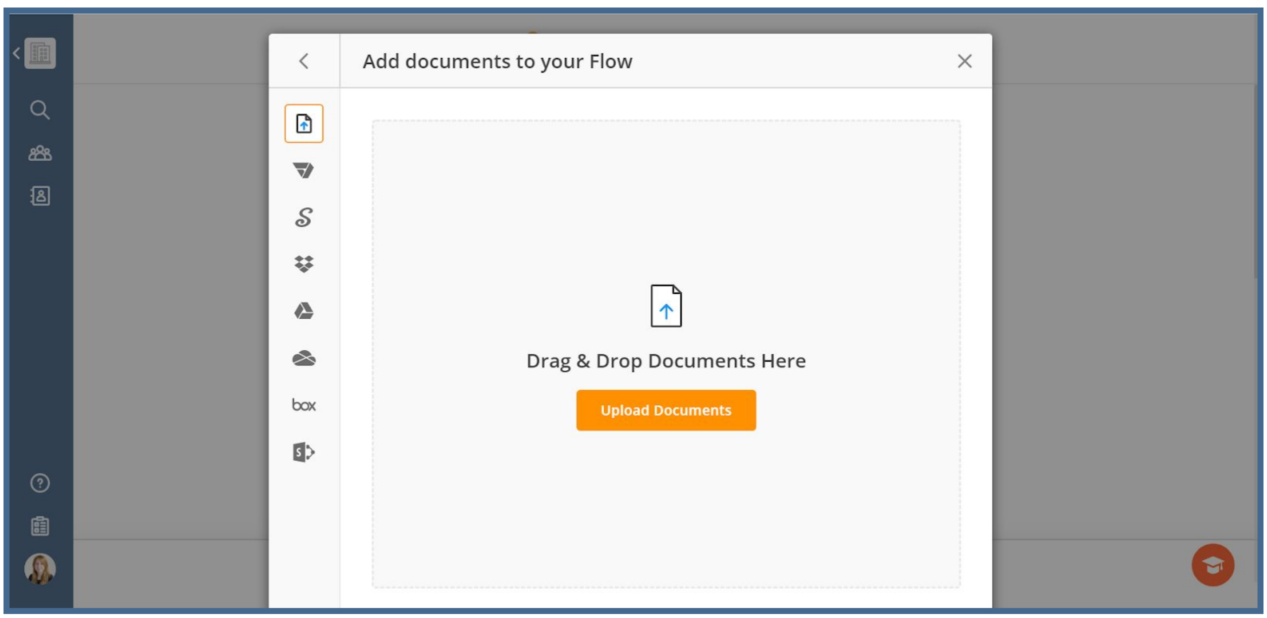


2. Name the flow and add the document to it.

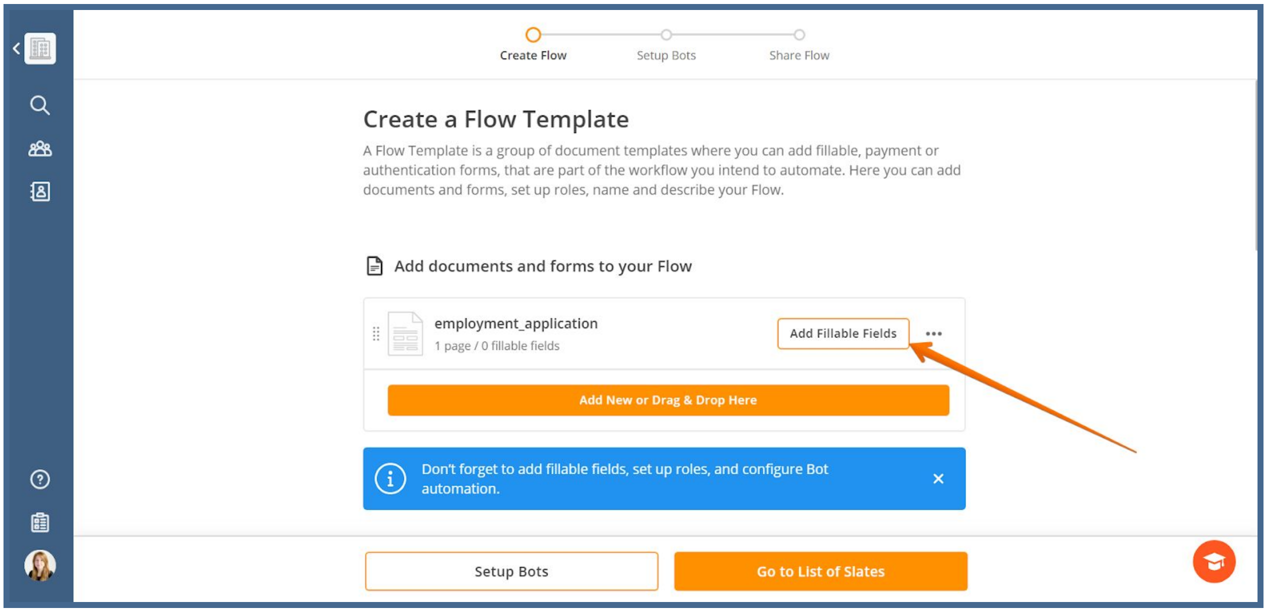
Let's use an employment application for this example. There are three different options to add a document to your Flow.

- *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



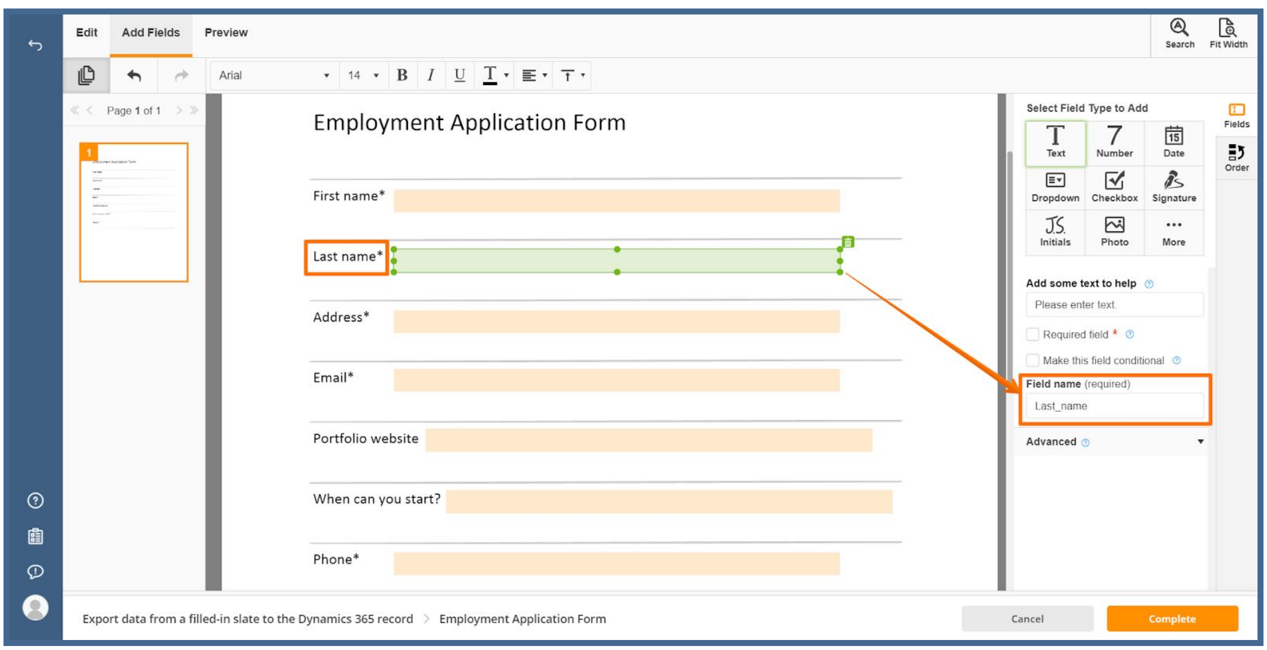


3. Add fillable fields to your document.



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.

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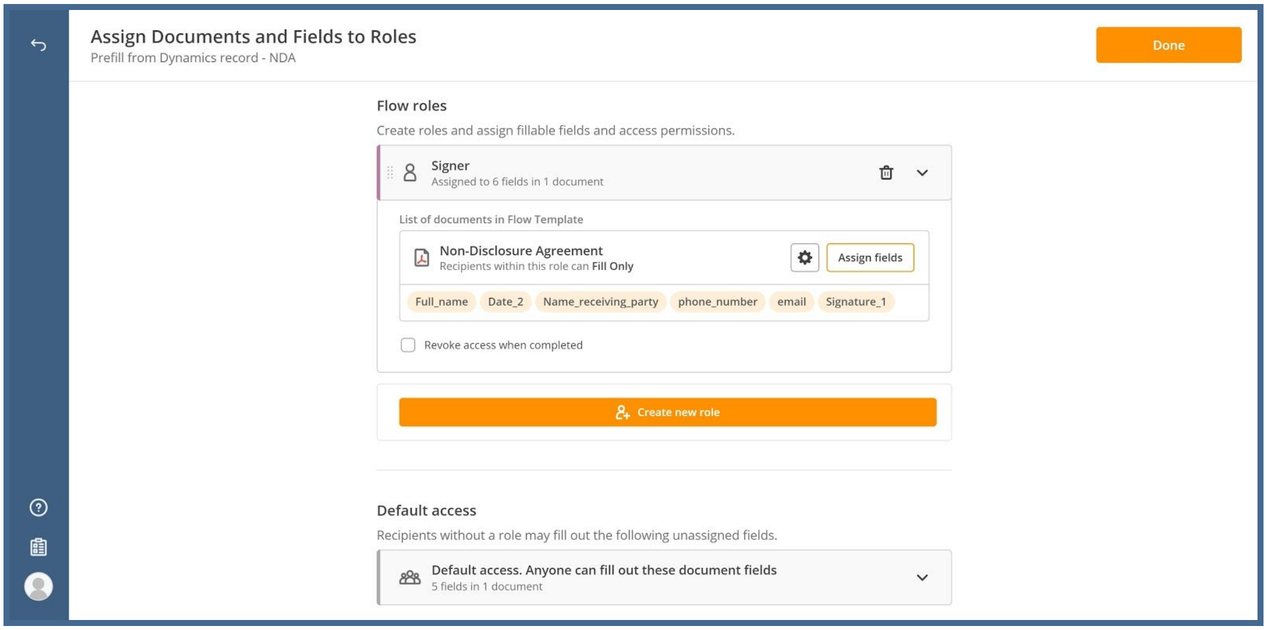
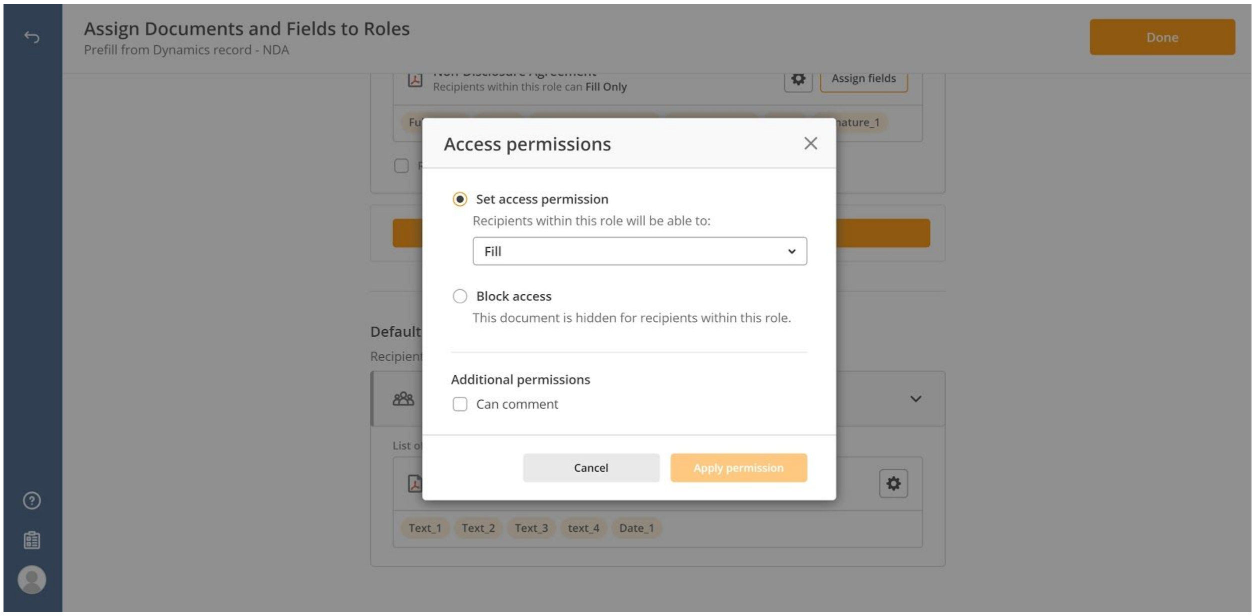
Roles

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.



- 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.



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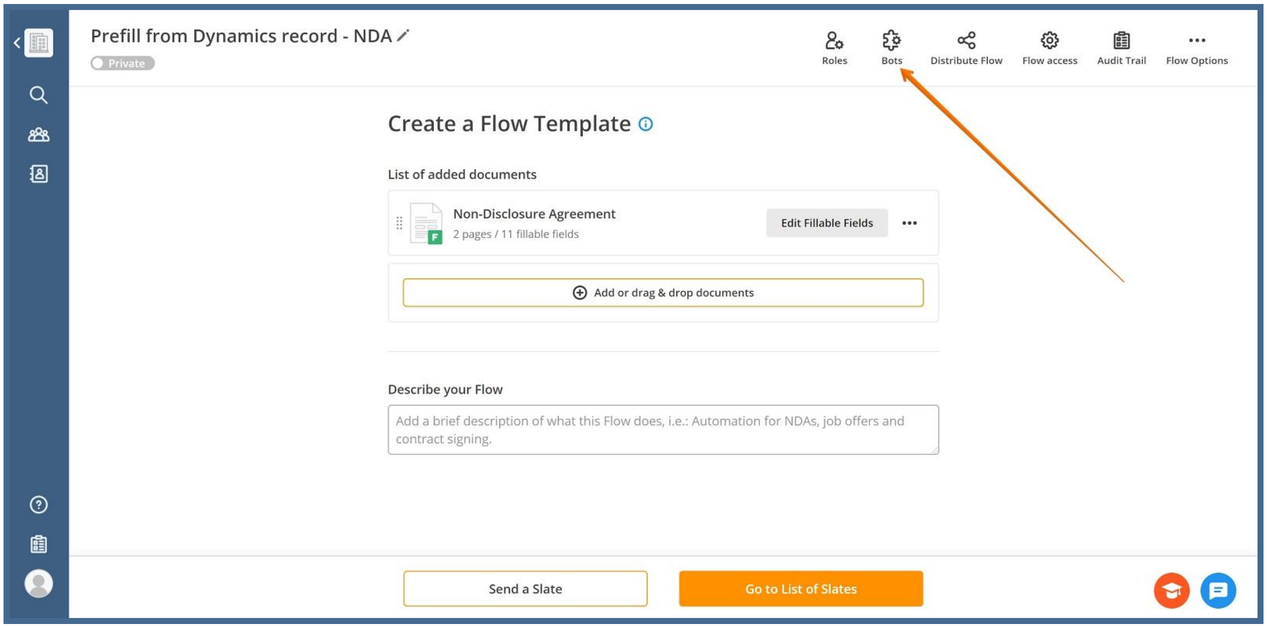
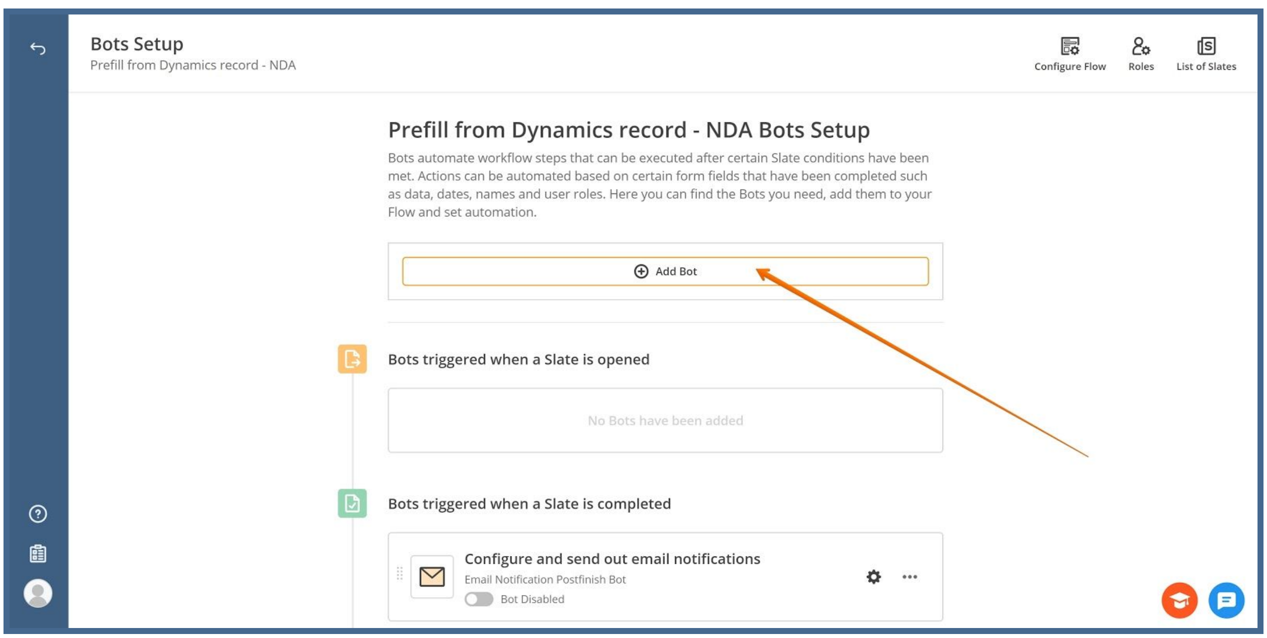
Setup Bots: Find & Install an MS Dynamics 365 Bot

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.

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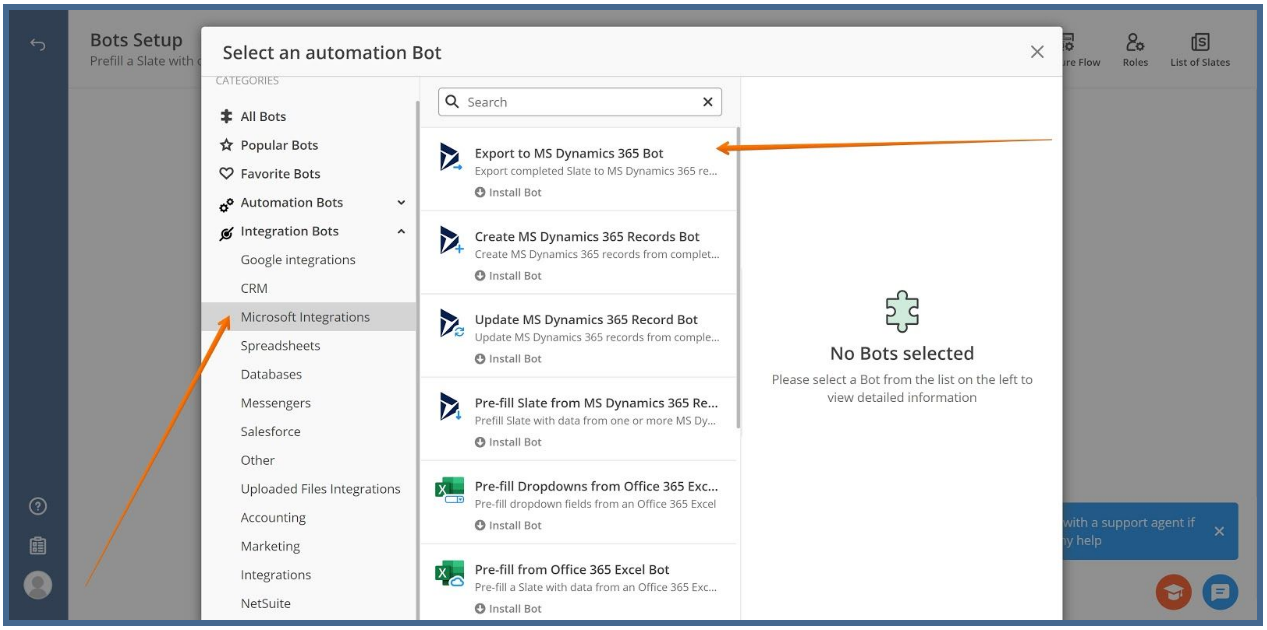
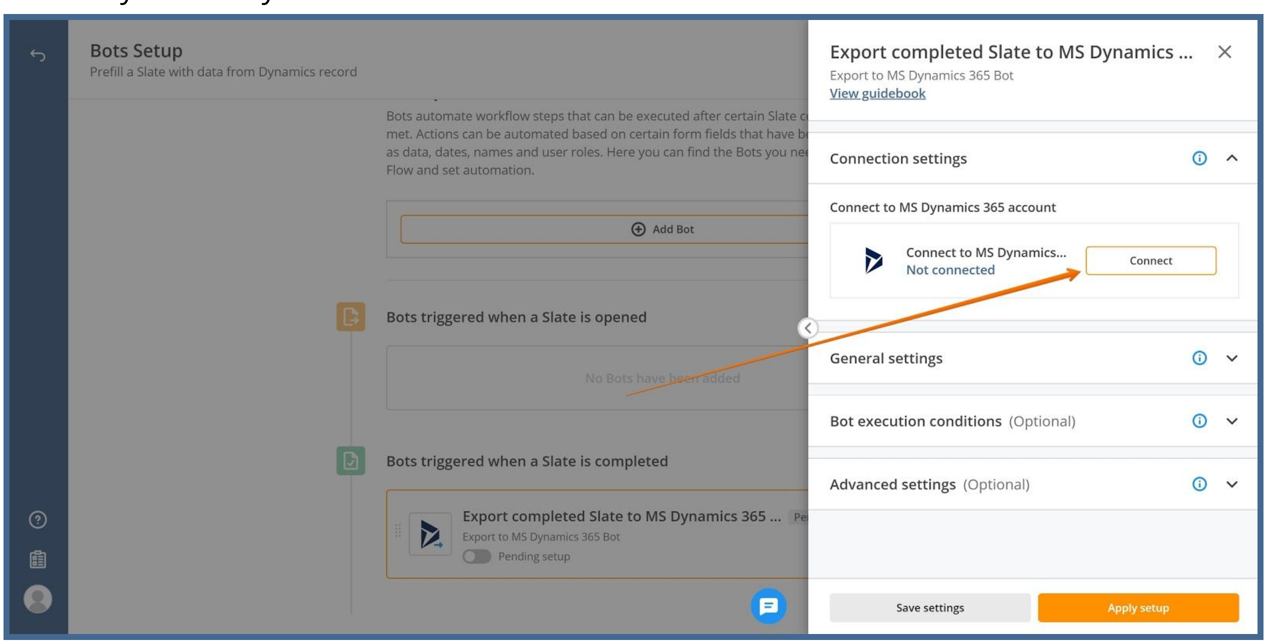


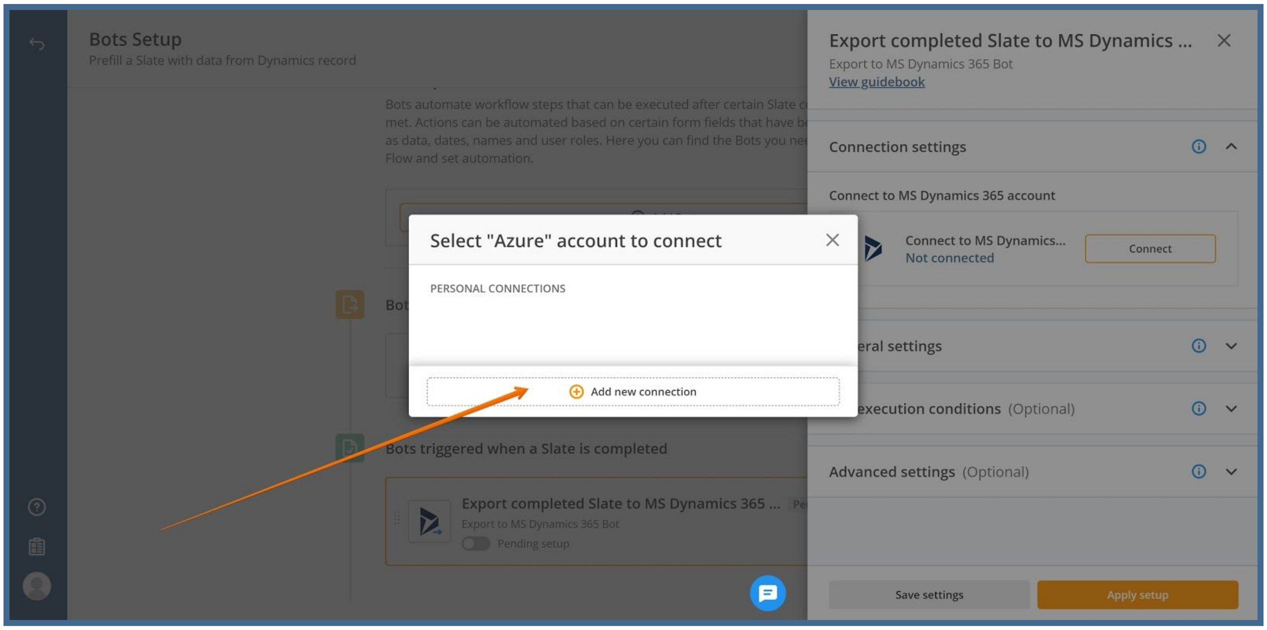
Click **Install Bot** to add it to the Flow.

Setup Bots: Connection Settings

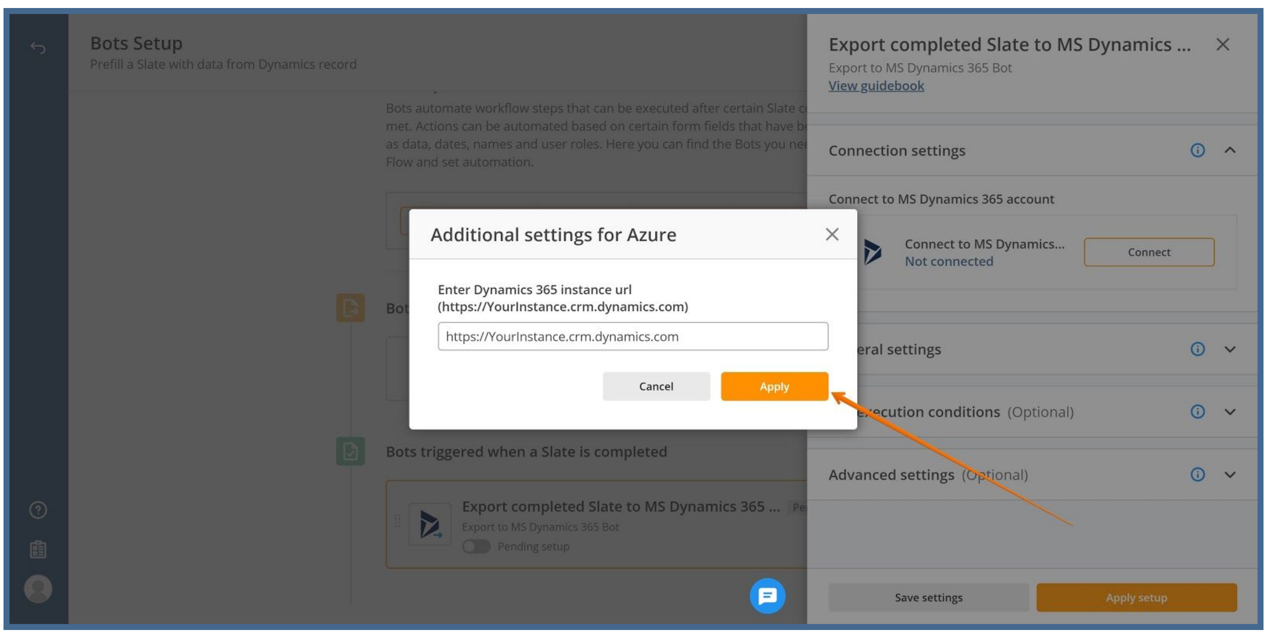
Connect your MS Dynamics 365 account:



Click **Add new connection**.

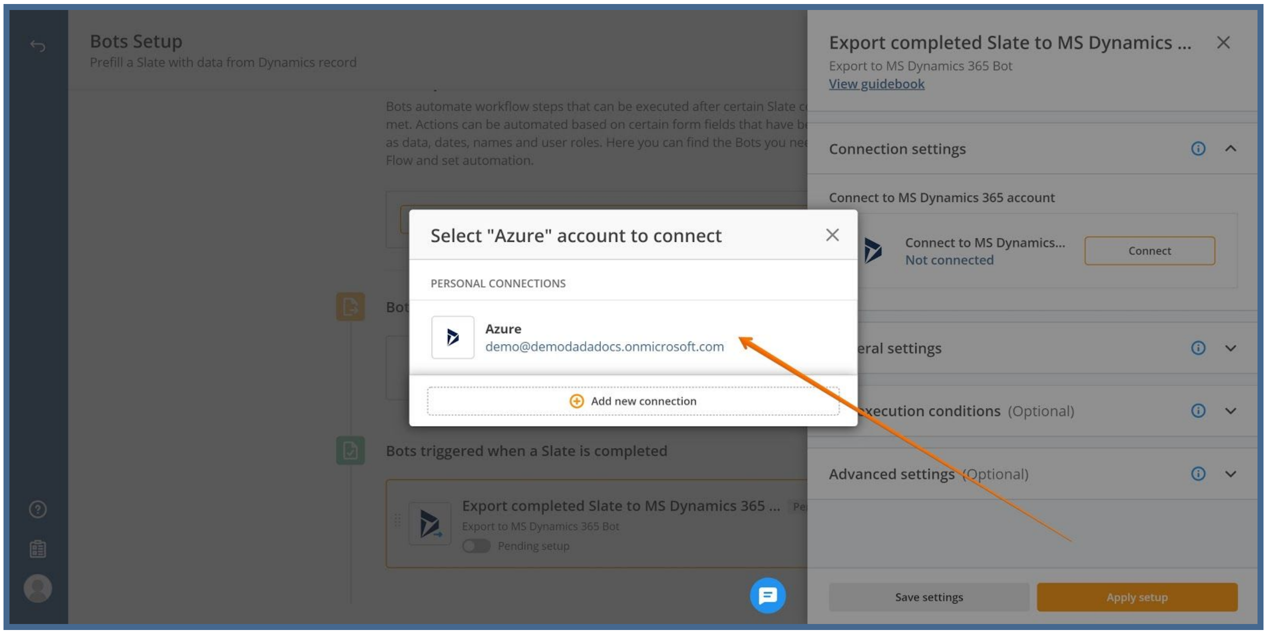


Insert your MS Dynamics 365 instance URL and click **Apply**.



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

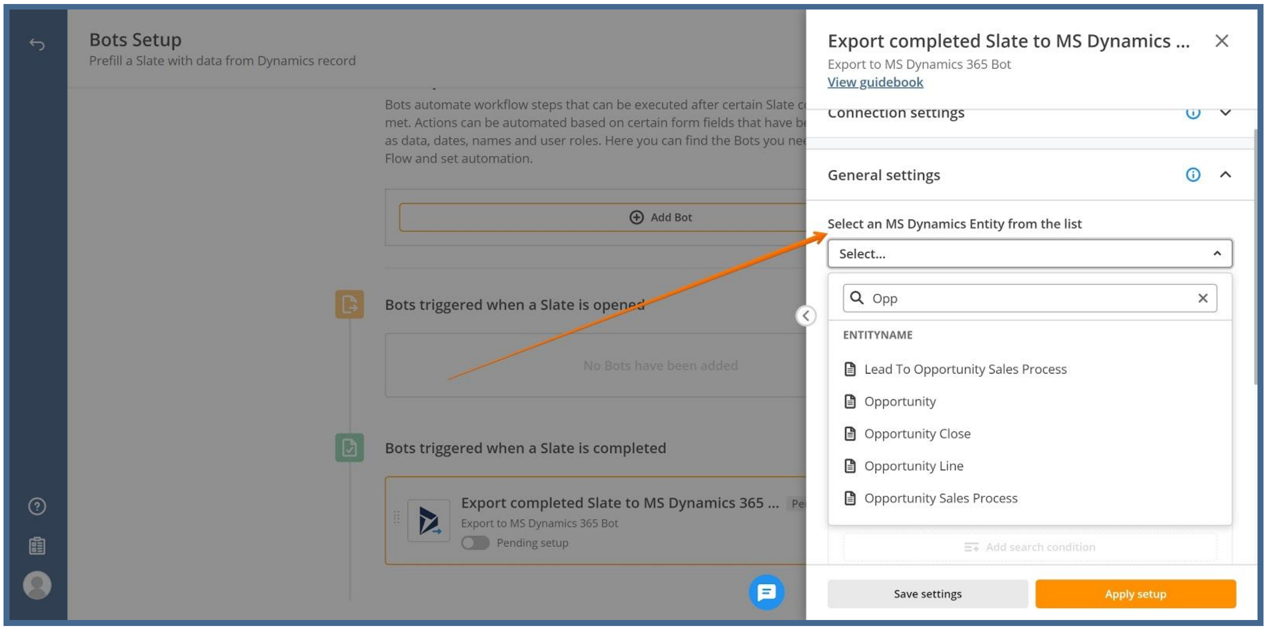
airSlate needs to identify what MS Dynamics 365 record should be used in your Flow. The identification is automated via two steps. First, you specify what MS Dynamics 365 entity to look for. Second, you set up what document fields and entity fields must contain identical values. In airSlate, they are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

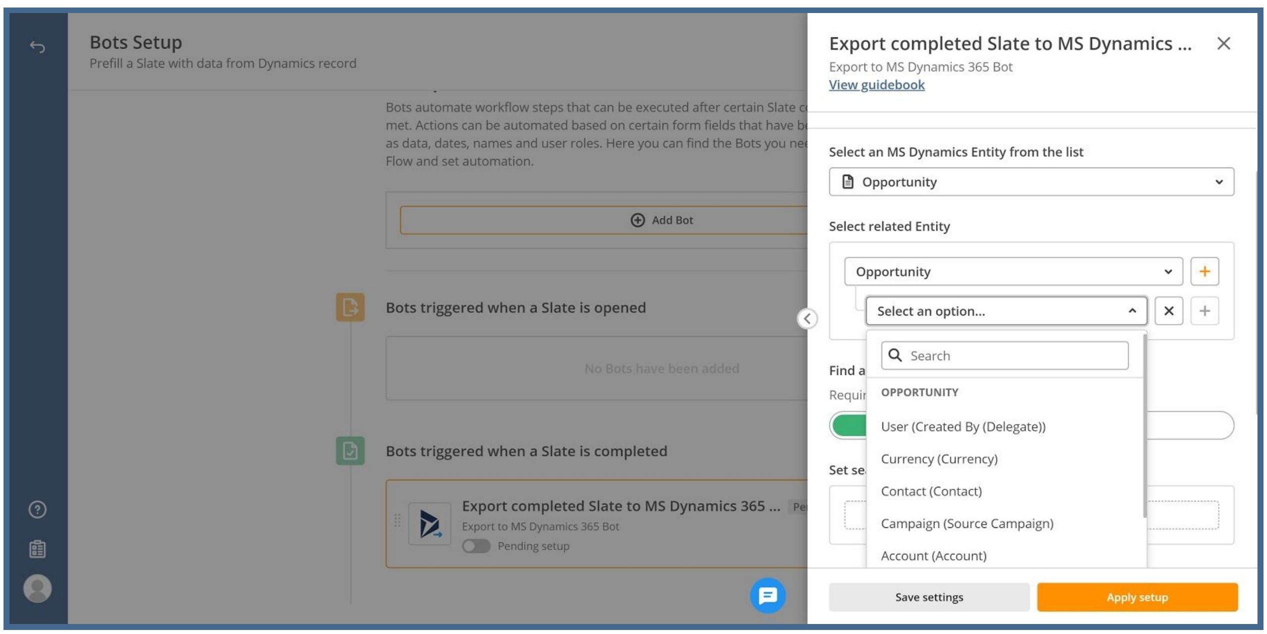
1. Select the MS Dynamics 365 entity*.

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.

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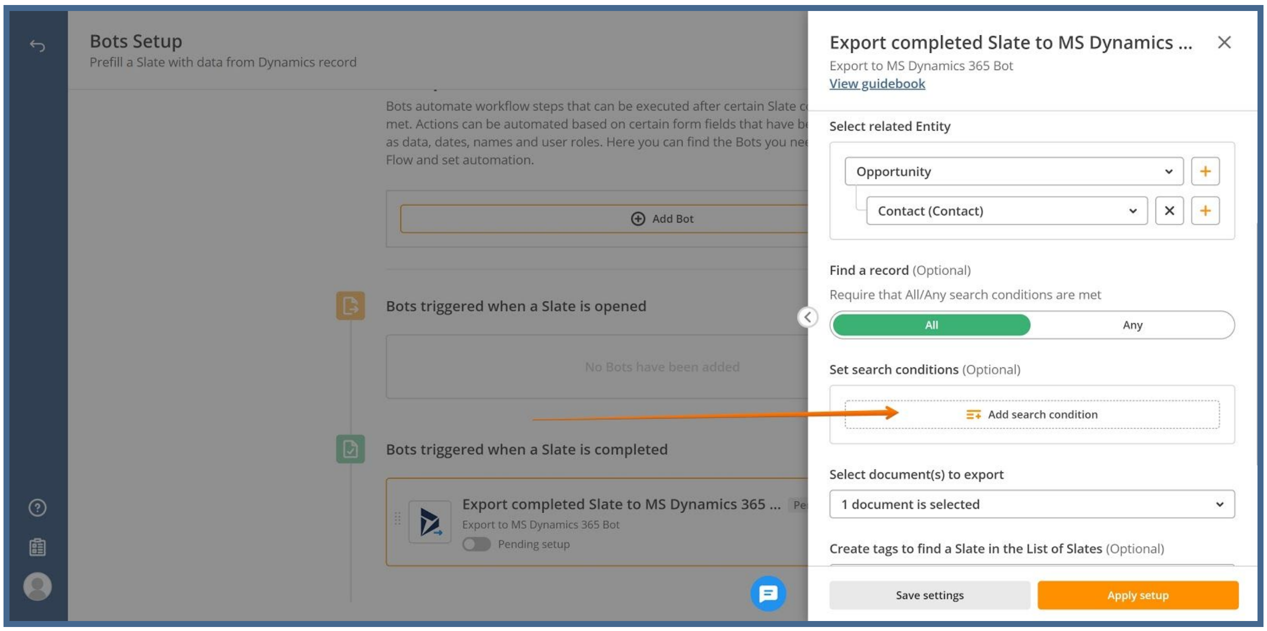
This allows bots to compare values in the document with the record values and use the results to establish where exactly you'd like to upload the complete slate, for example. If the account number is the same in the document and in the record, the bot identifies this record as correct and attaches the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

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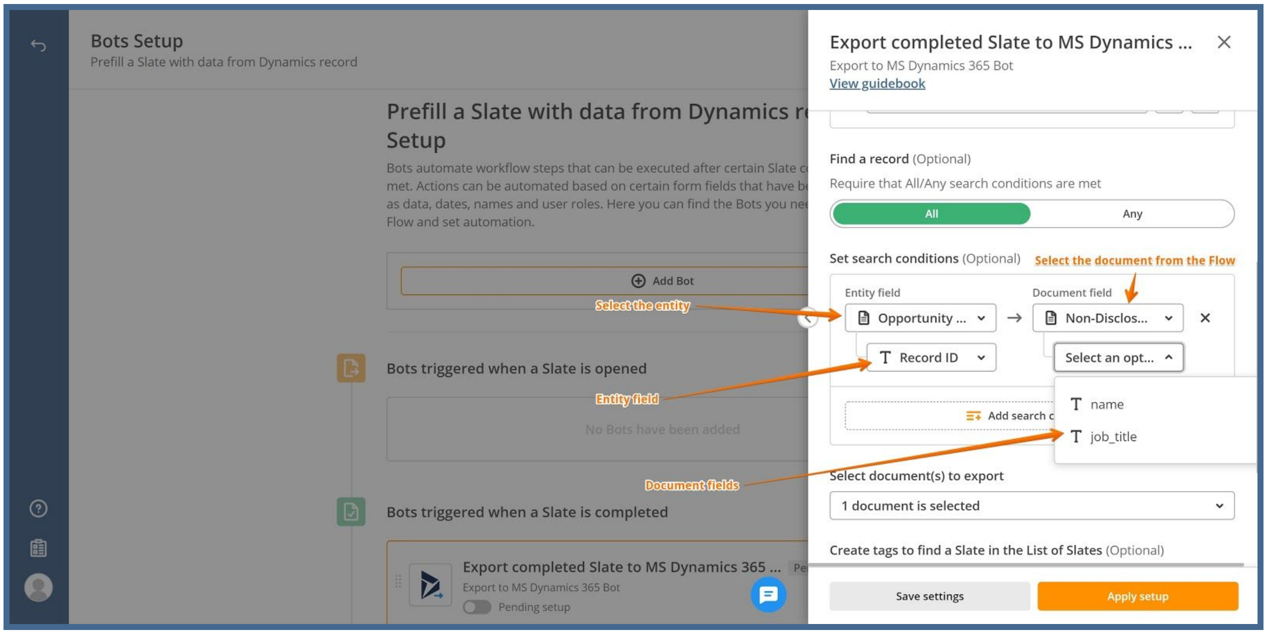
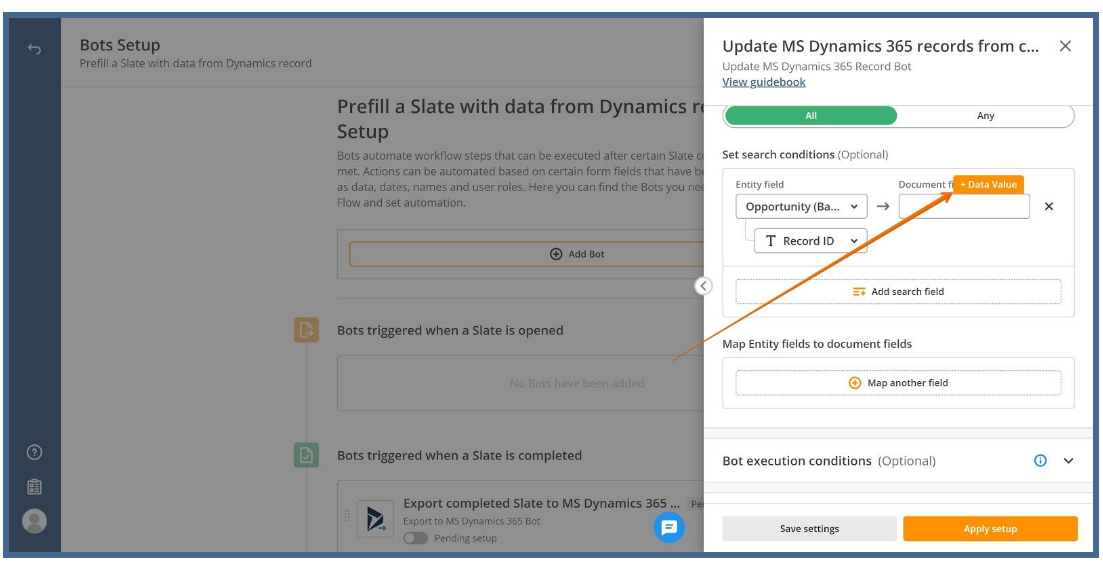


Feel free to add as many identifying fields as you want. To do so, just click **Add search condition** and repeat the matching.

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**.



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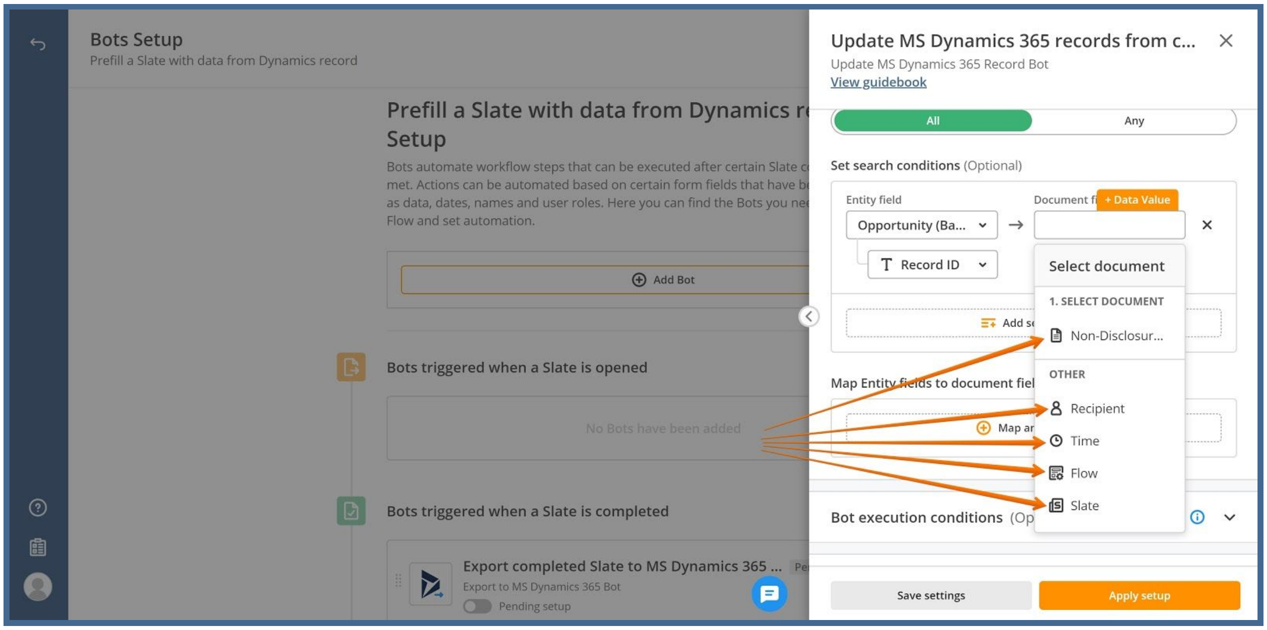
Select the name of the document to go to document fields, or use one of the other options: Recipient, Time, Flow, or Slate.



- 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.

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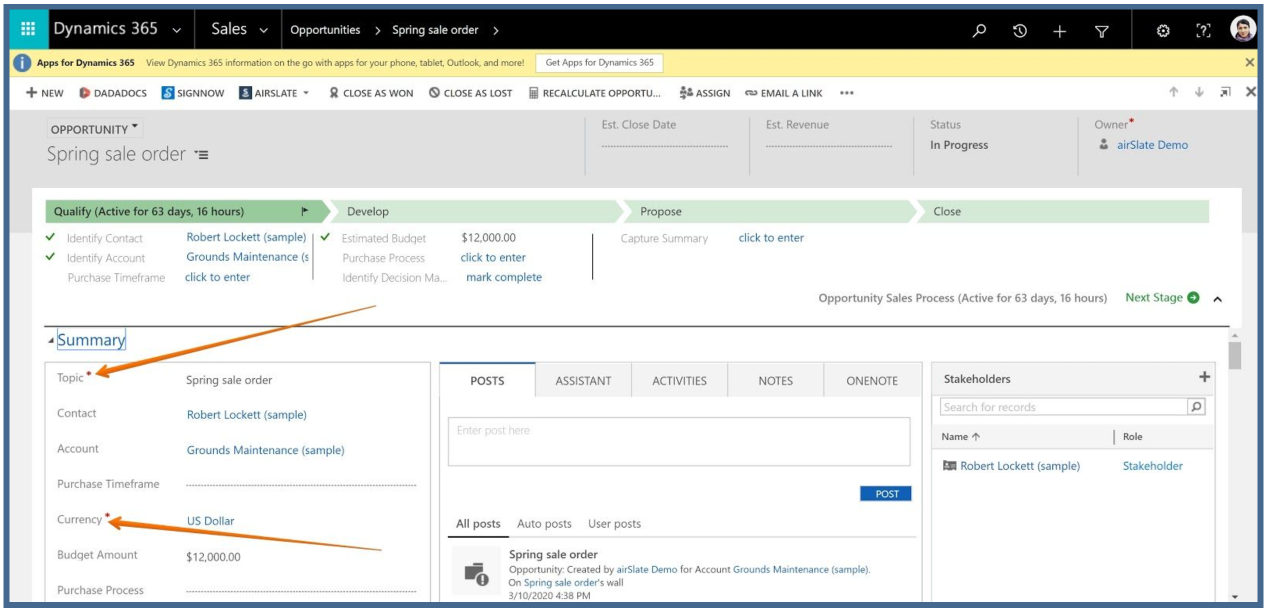
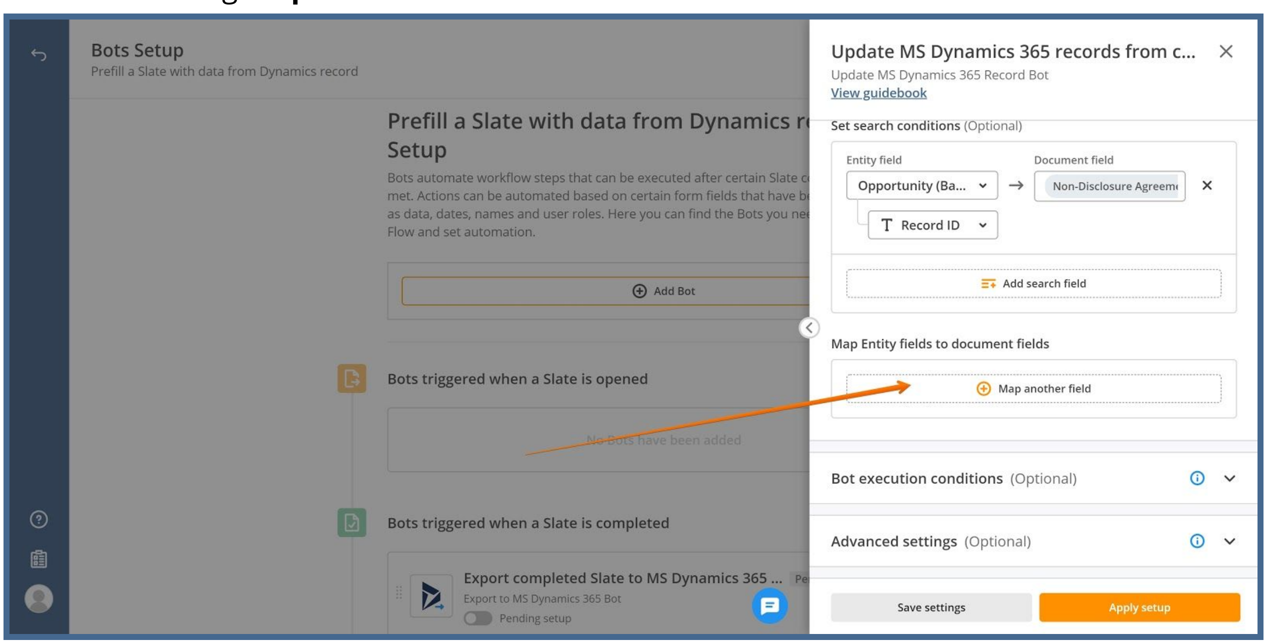
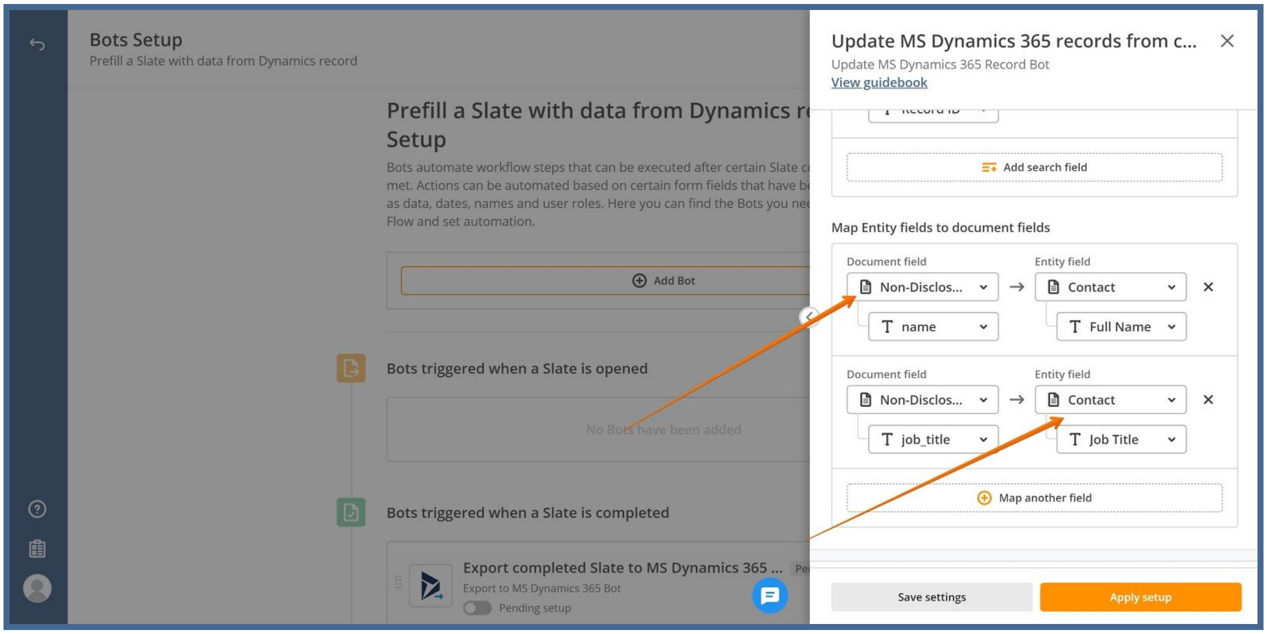
Remember to map all the required MS Dynamics 365 entity fields, otherwise MS Dynamics 365 won't let you create or update a new record. The required fields are marked by a star symbol in every record.



Start with clicking **Map another field**.



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).



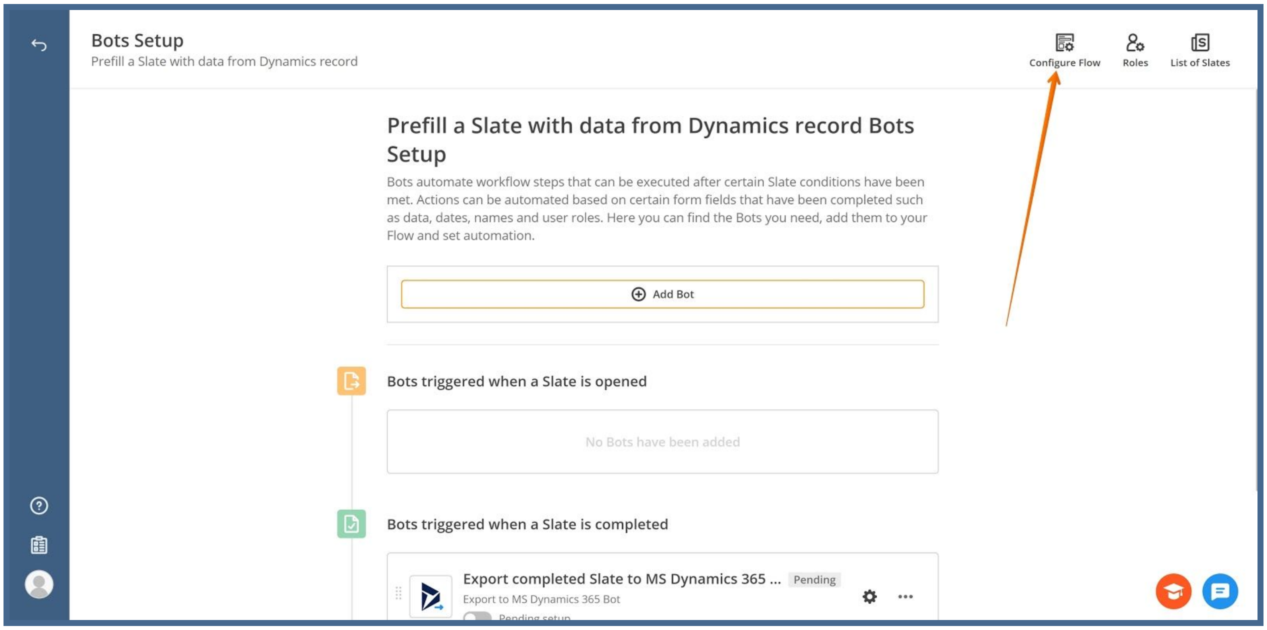
Repeat the mapping for every field.

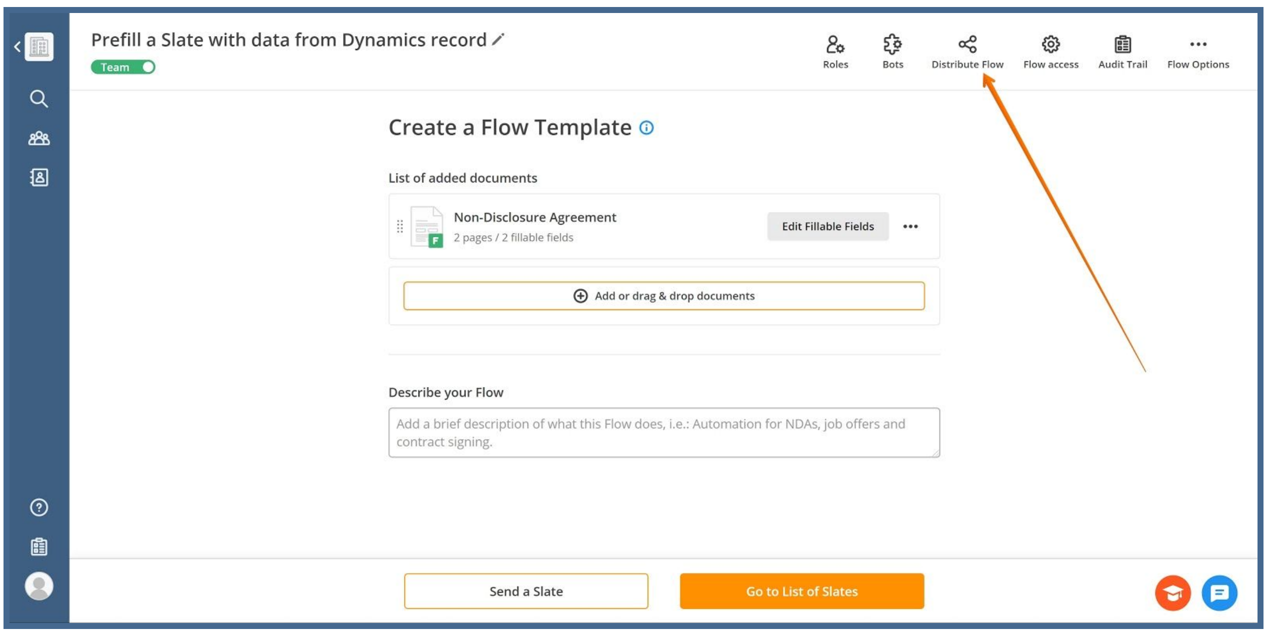
Click **Apply setup** when you're done.

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.





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

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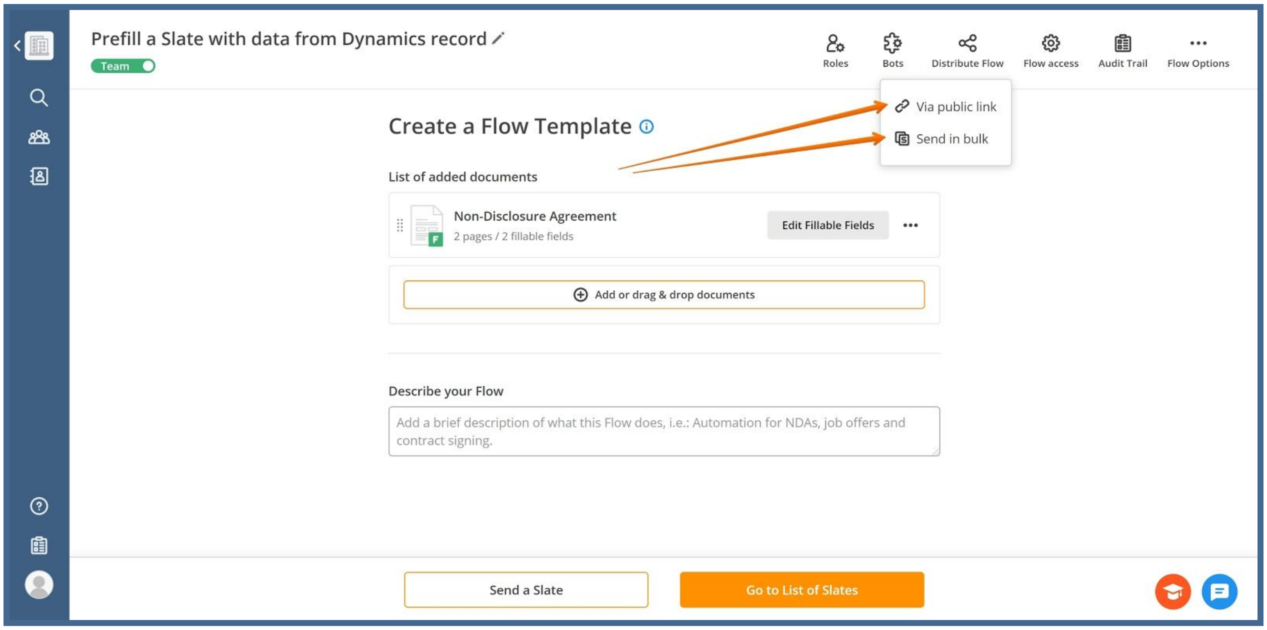
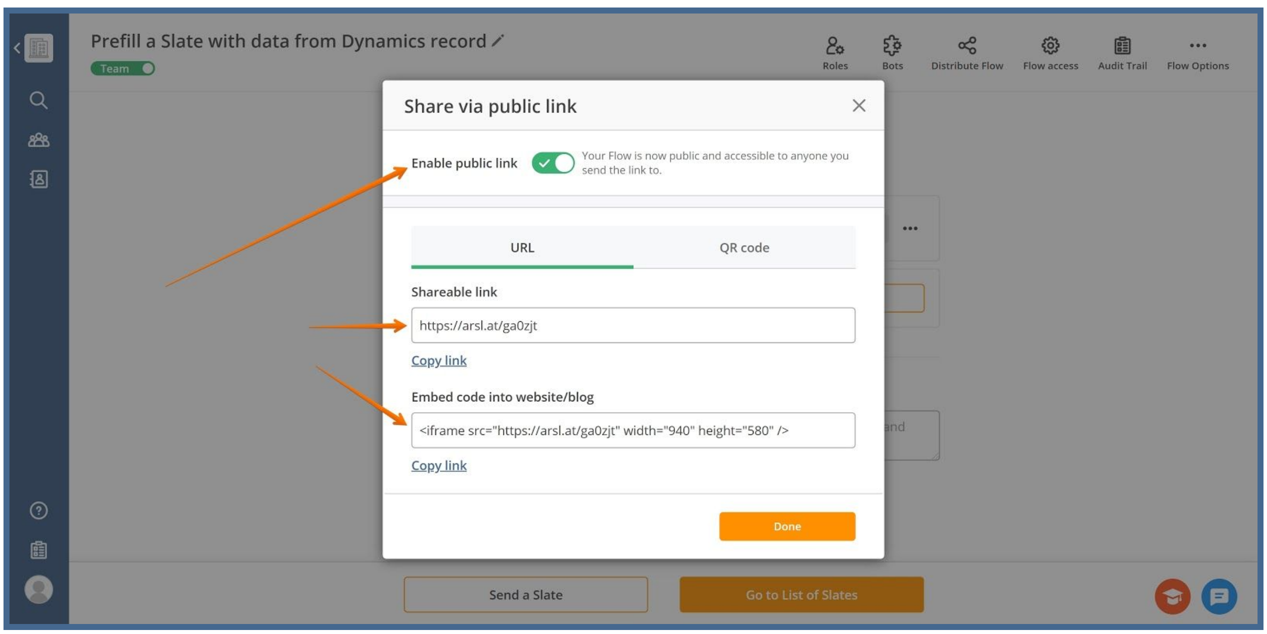
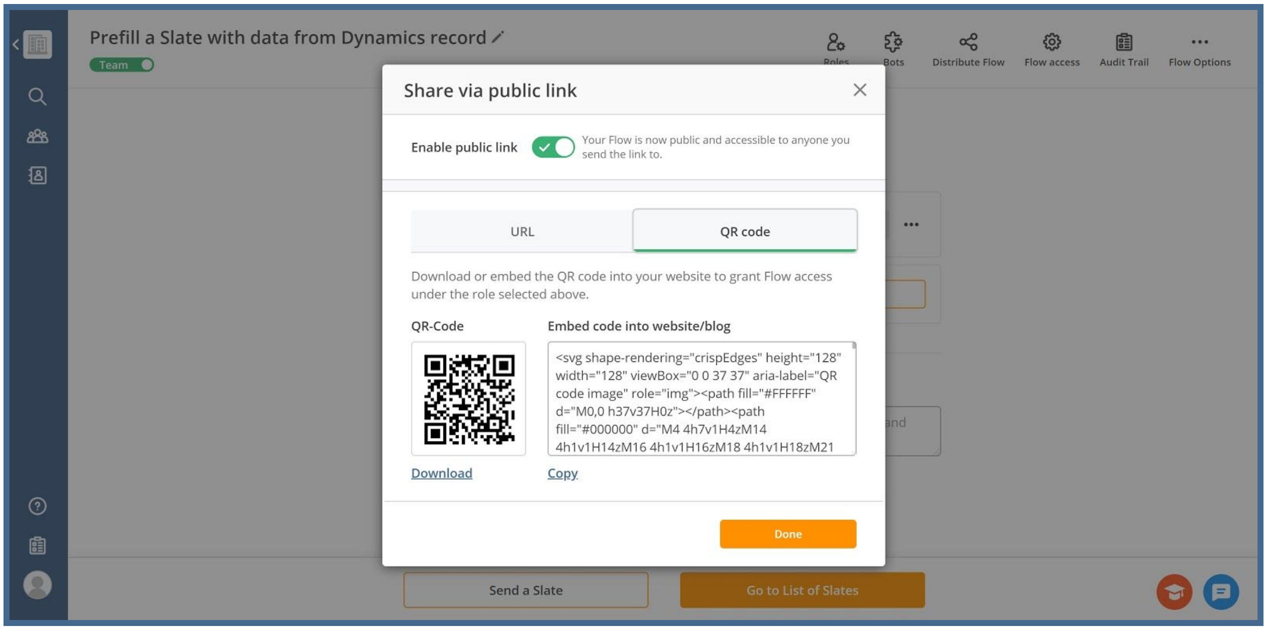


Via public link

- *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.

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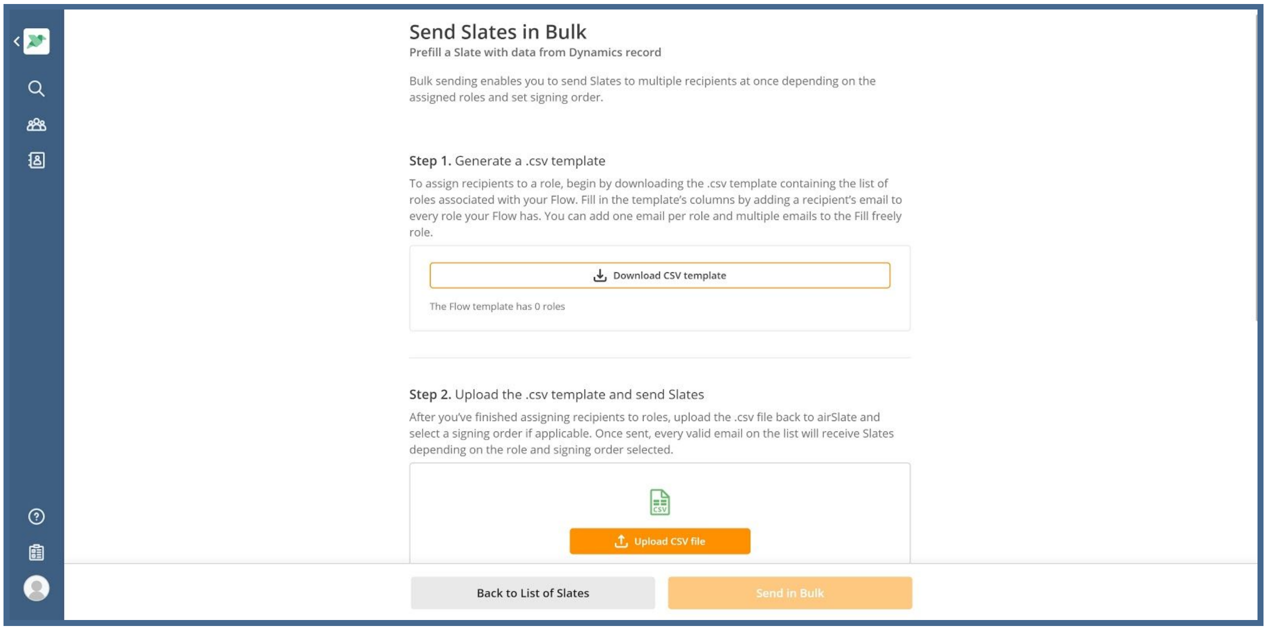

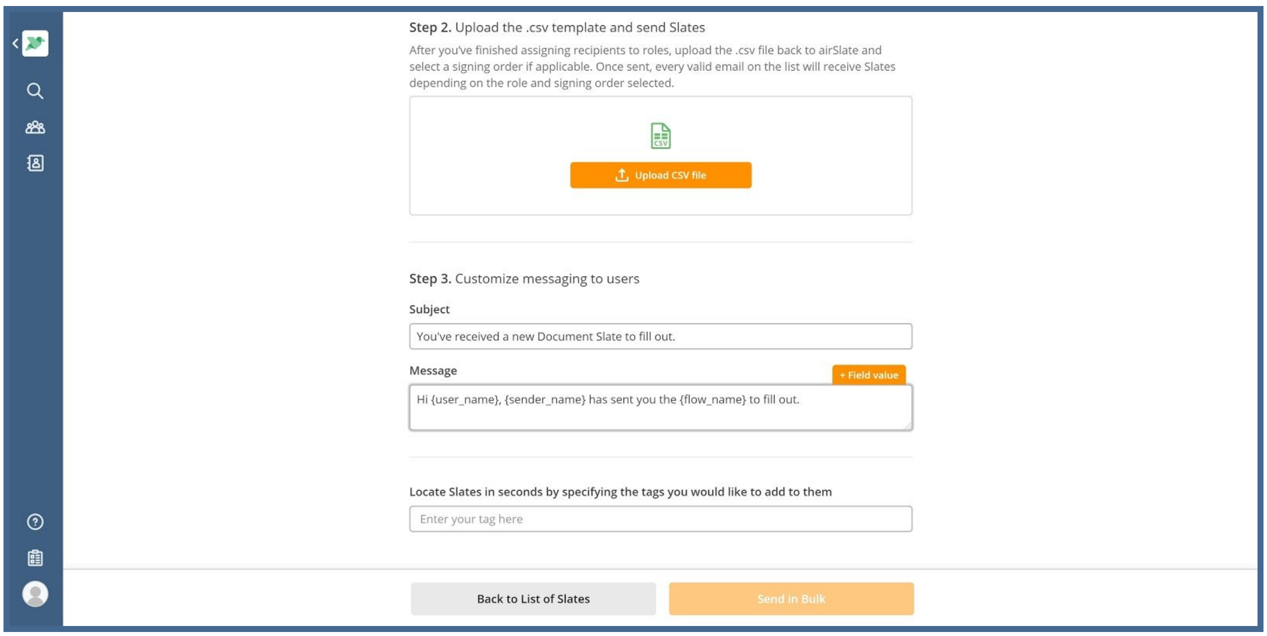

Click **Send in Bulk** when you're done.

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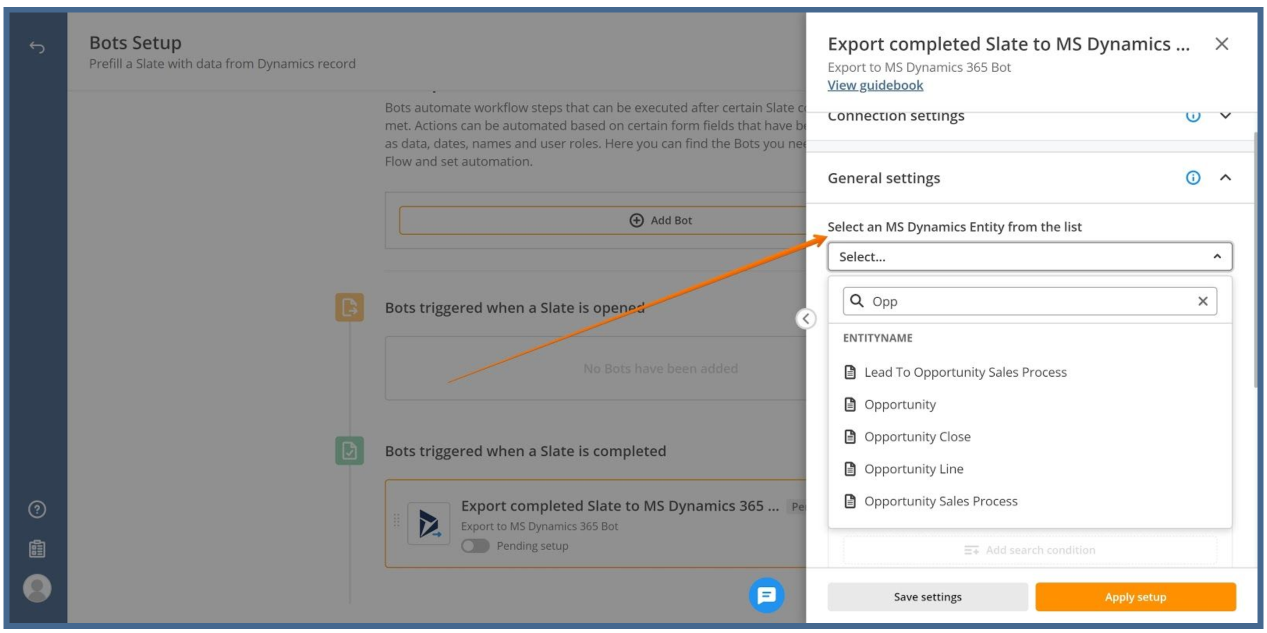
Export a completed slate to the Dynamics 365 record

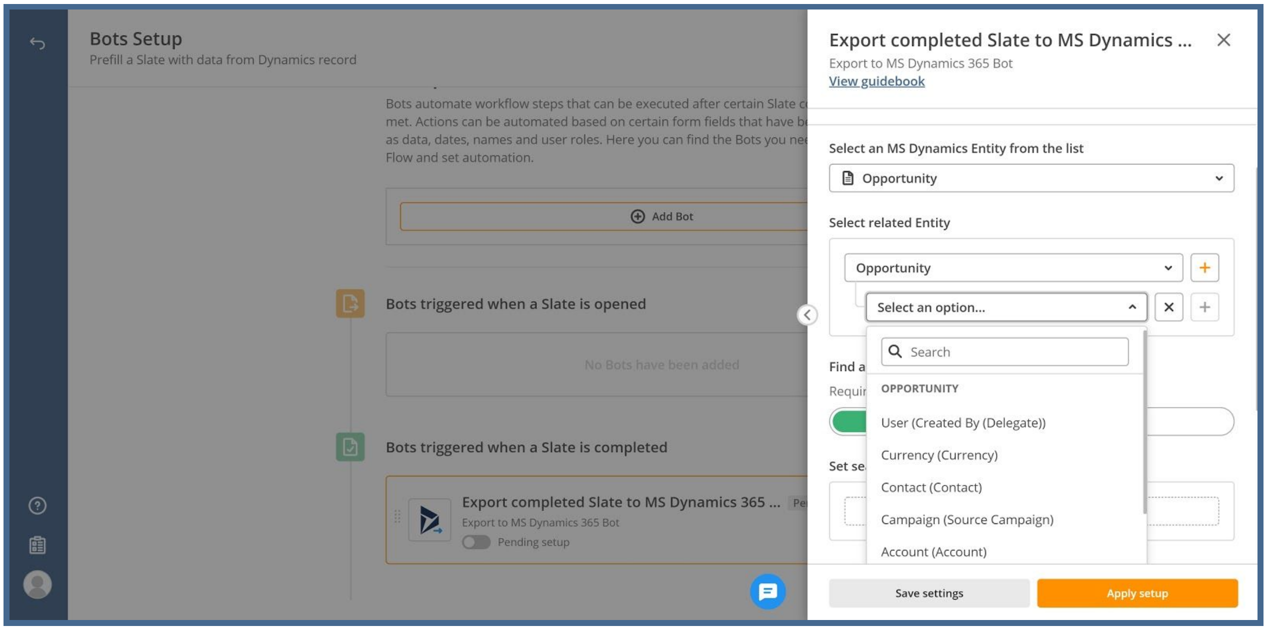
Leverage the Export to MS Dynamics 365 record bot to automatically upload a completed slate as a PDF attachment to the MS Dynamics 365 record. Automate collecting documents and save them consistently to the same specific record in MS Dynamics 365.

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.



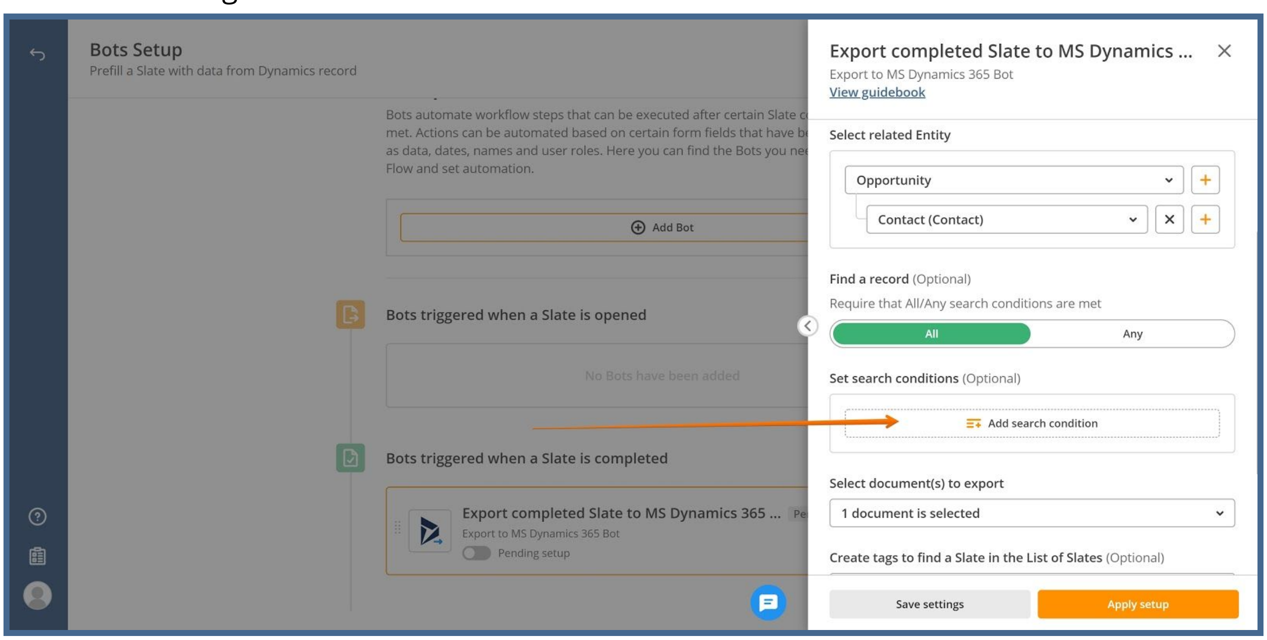
If necessary, select the related Entity as well.



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**.



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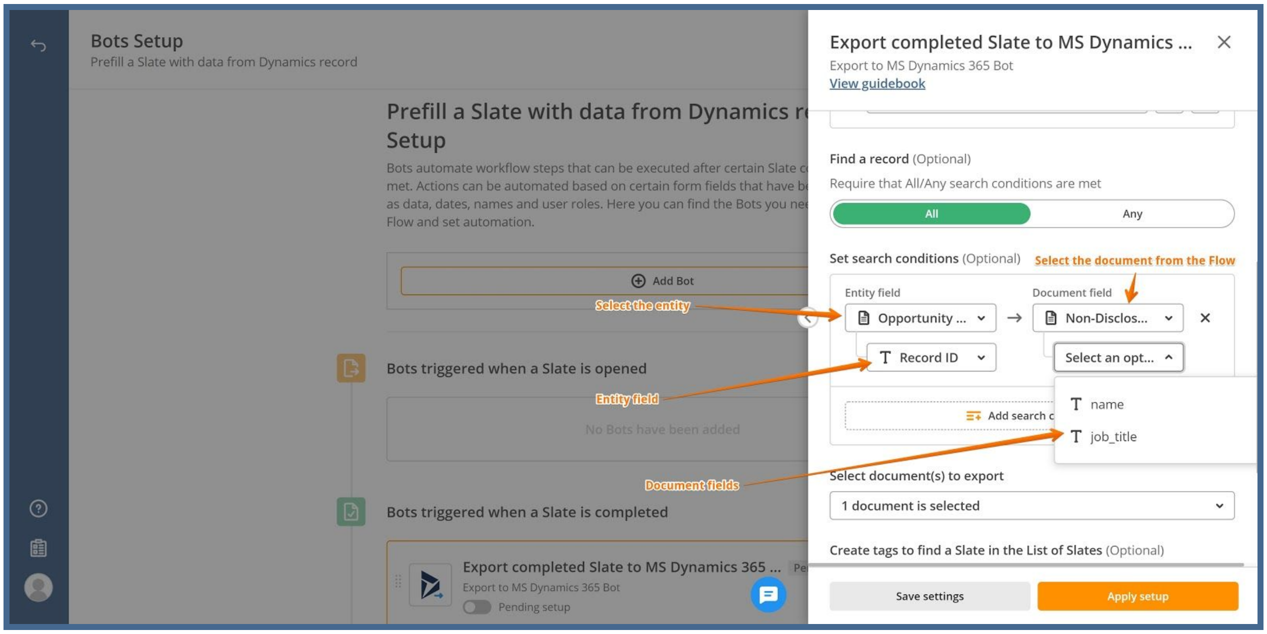
5. Select the **Entity field** from the dropdown, then select the **Document field** from the other dropdown under the name of your document.



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.

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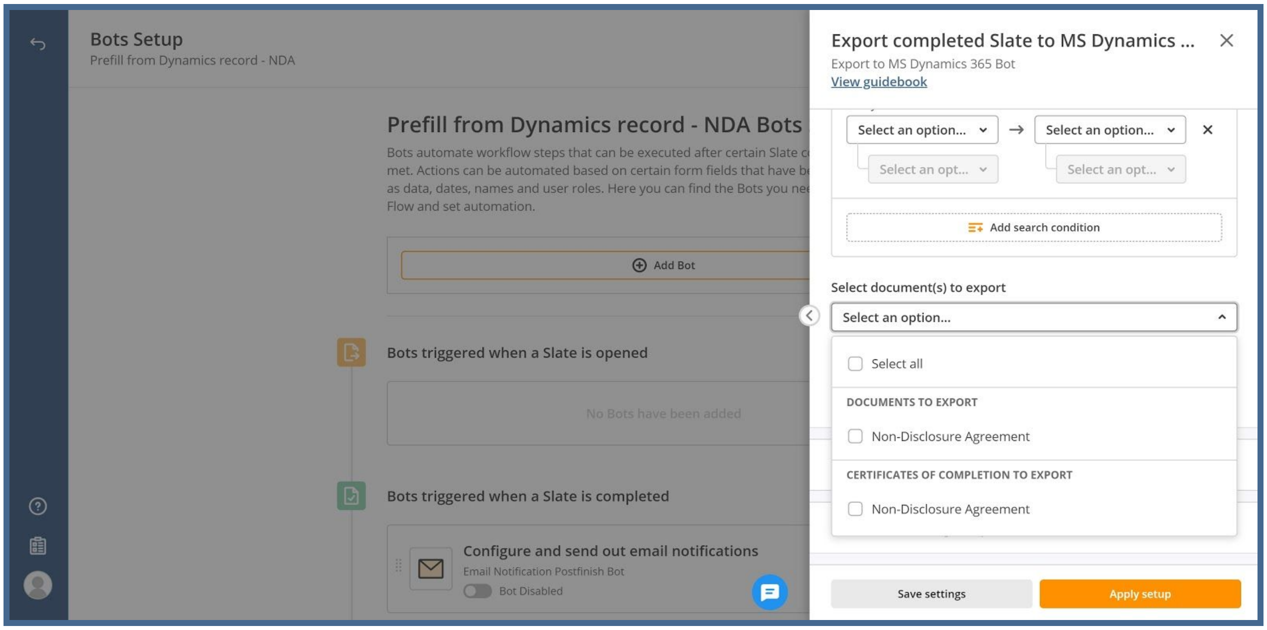


7. Click **Apply setup** when you're done.

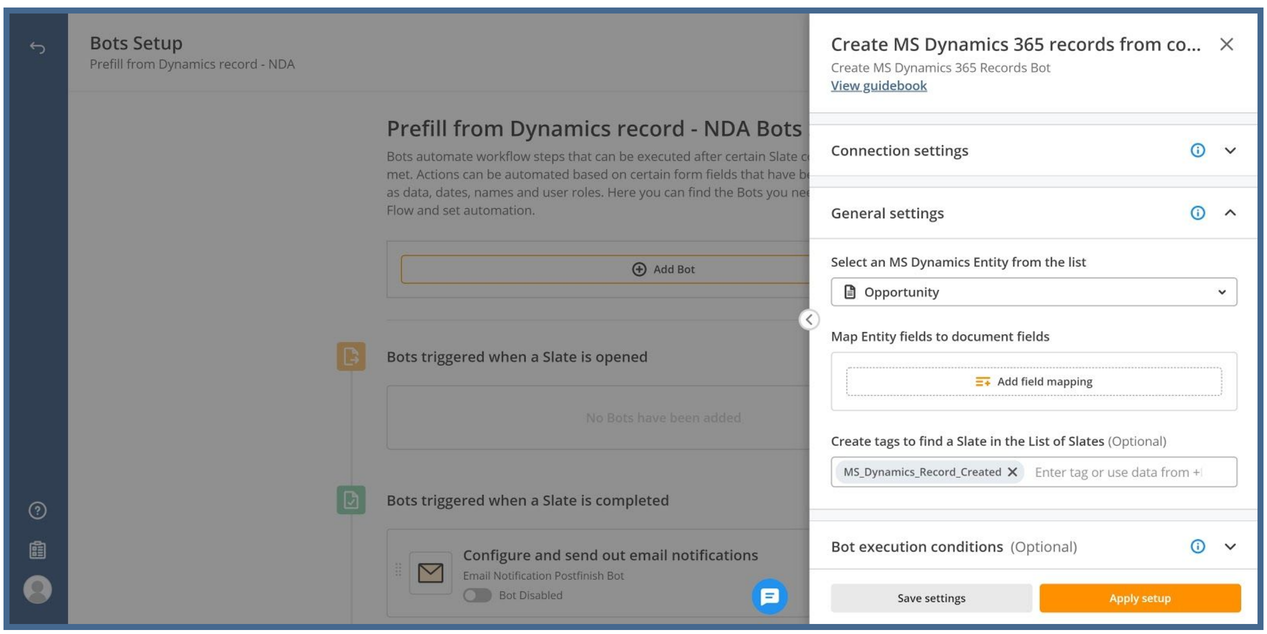
8. Make your Flow public to start using it as described in *Distribute Flow*.

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.

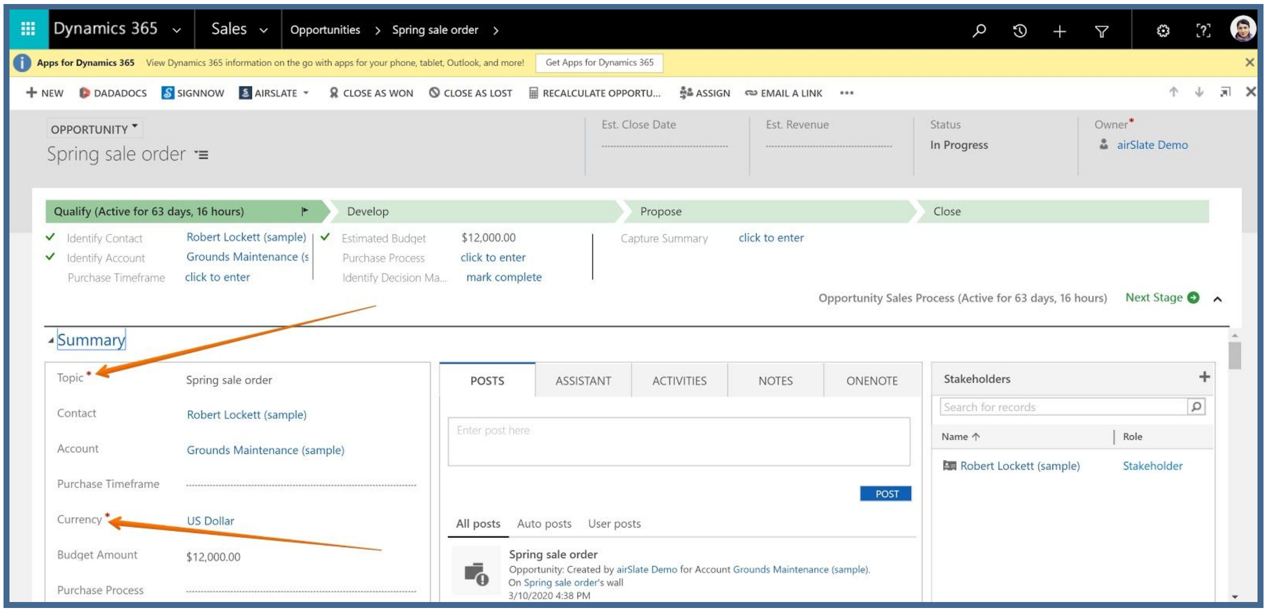


4. Map the entity fields with fillable fields in the document as described in *Setup Bots: General Settings - Mapping*.

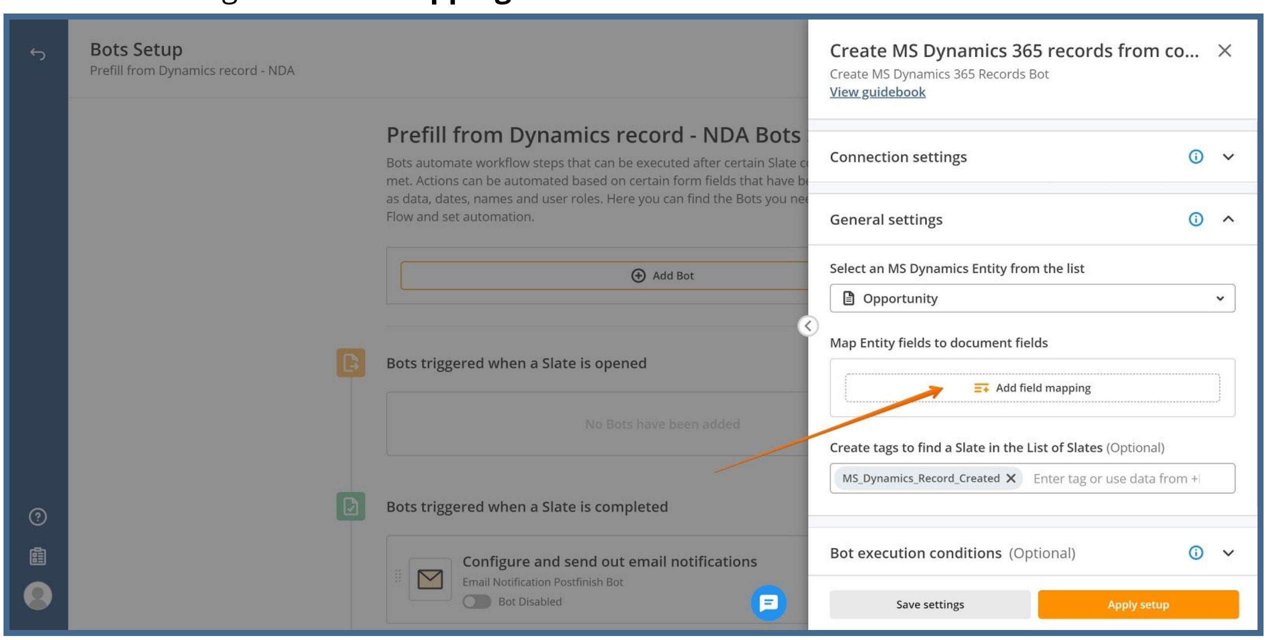
This allows airSlate bots to transfer data from the document into a new record correctly.

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.



Start with clicking **Add field mapping**.



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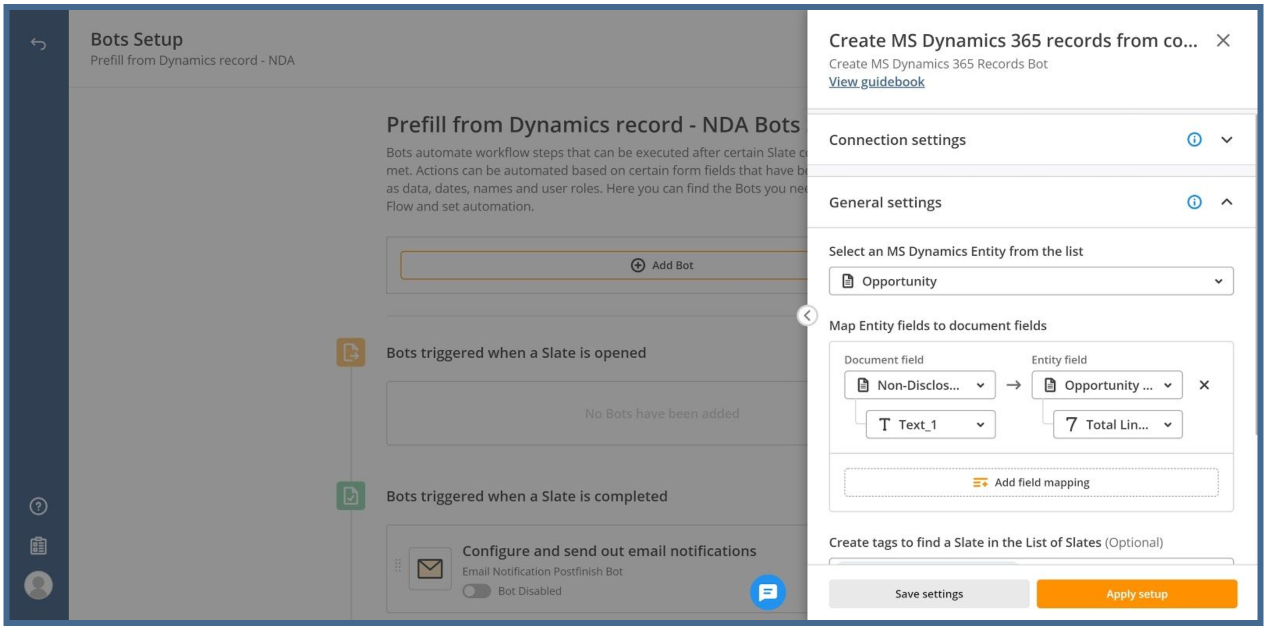
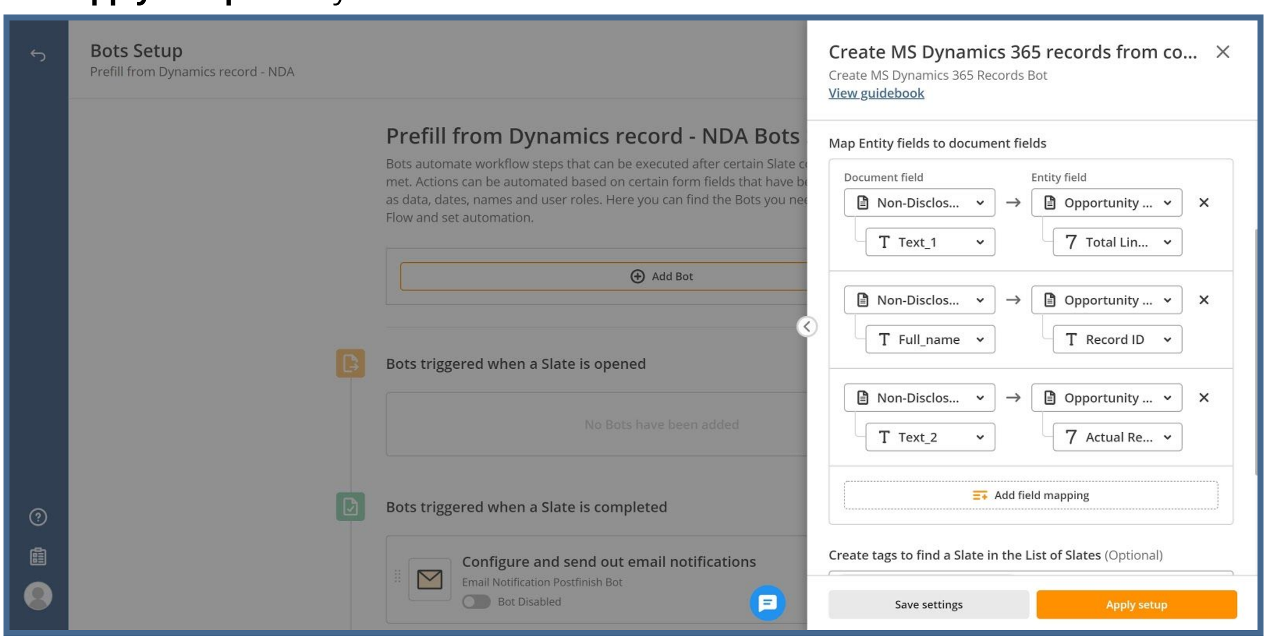
Select the **Document field** to transfer value from, then select the **Record field** to transfer value into.



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*.

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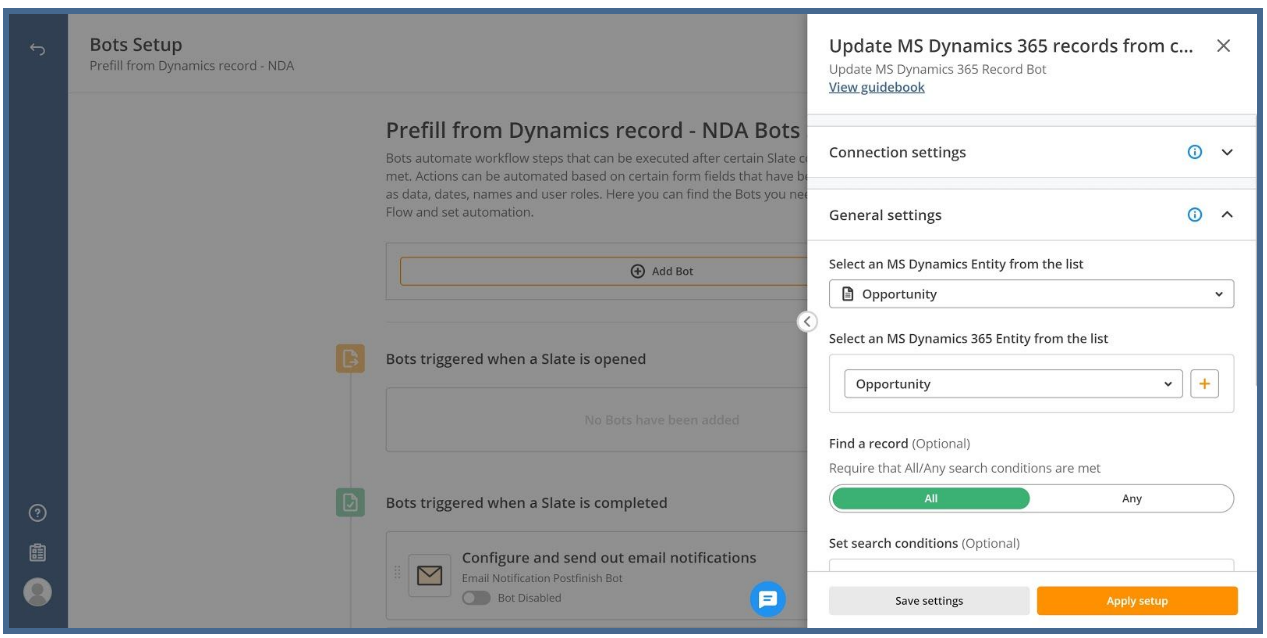
Update MS Dynamics 365 record using data from a completed slate

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.

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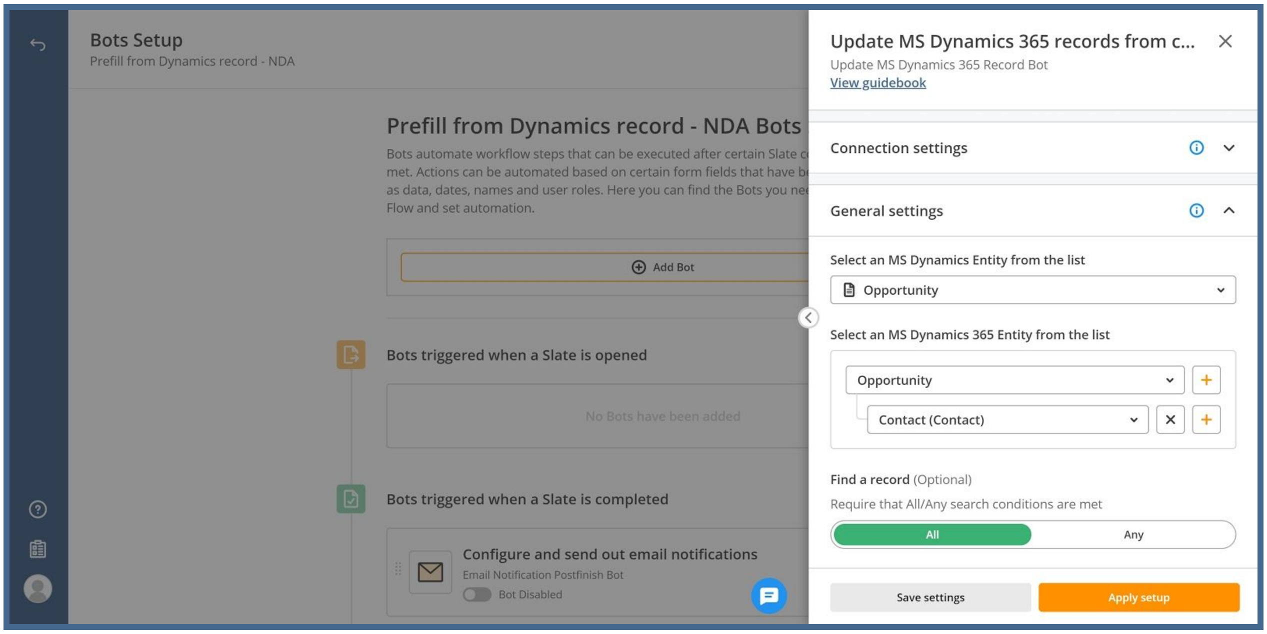
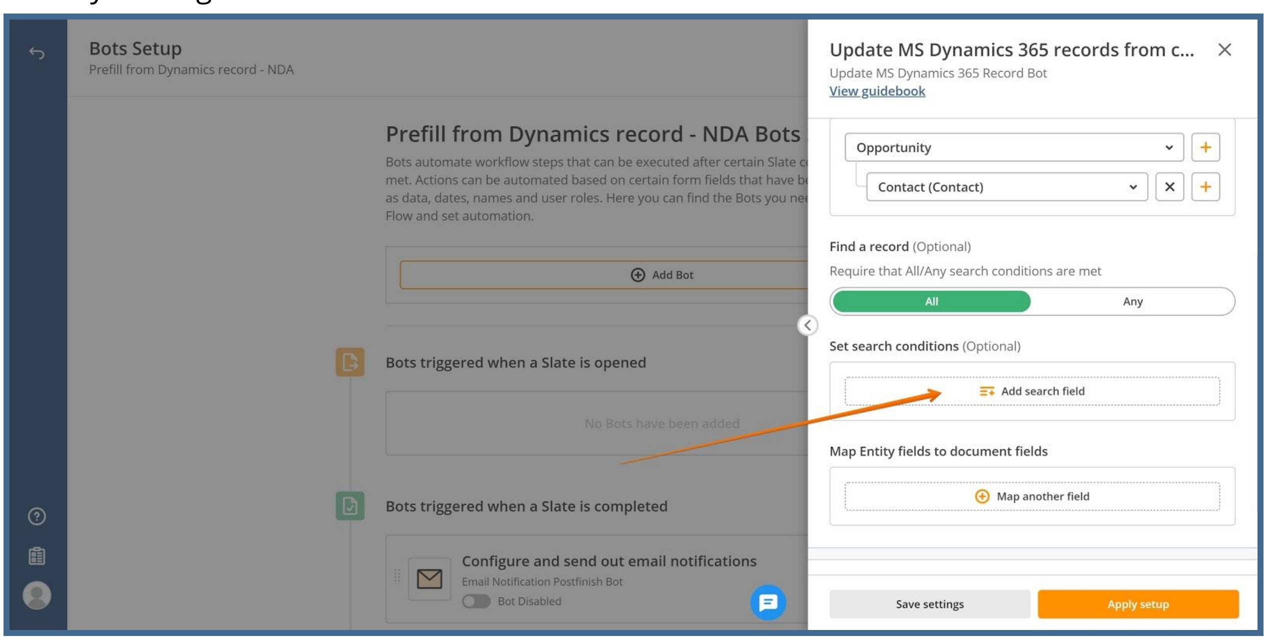


4. Identify the record you'd like to update as described in *Setup Bots: General settings - Find a record*.

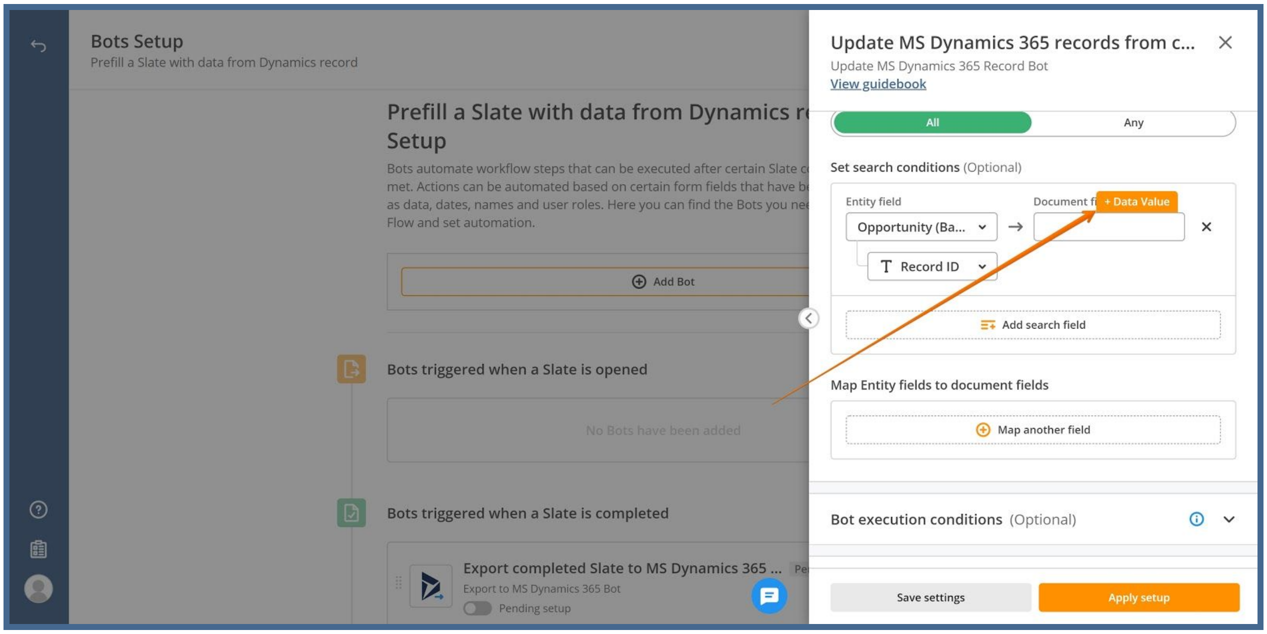
Select record fields which contain these values and link them to the fillable fields which should contain the same values in the document.

Start by clicking **Add search field**.

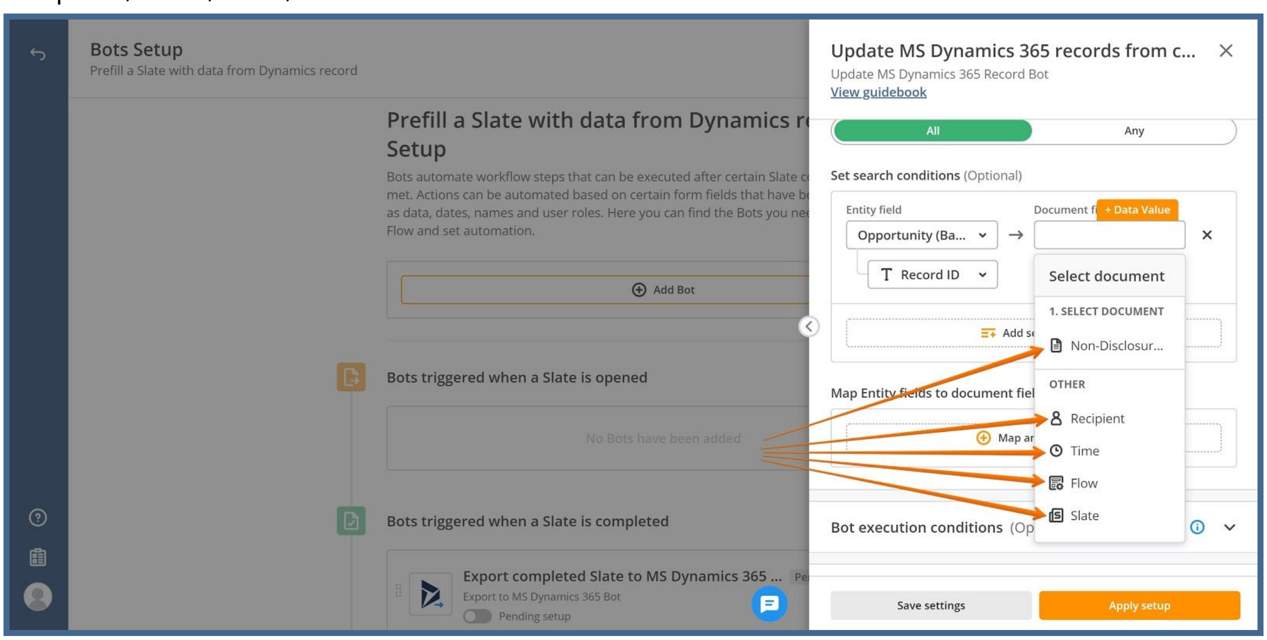


Select the **Entity field** from the dropdown, then select the **Document field** from the other dropdown under the name of your document.

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.



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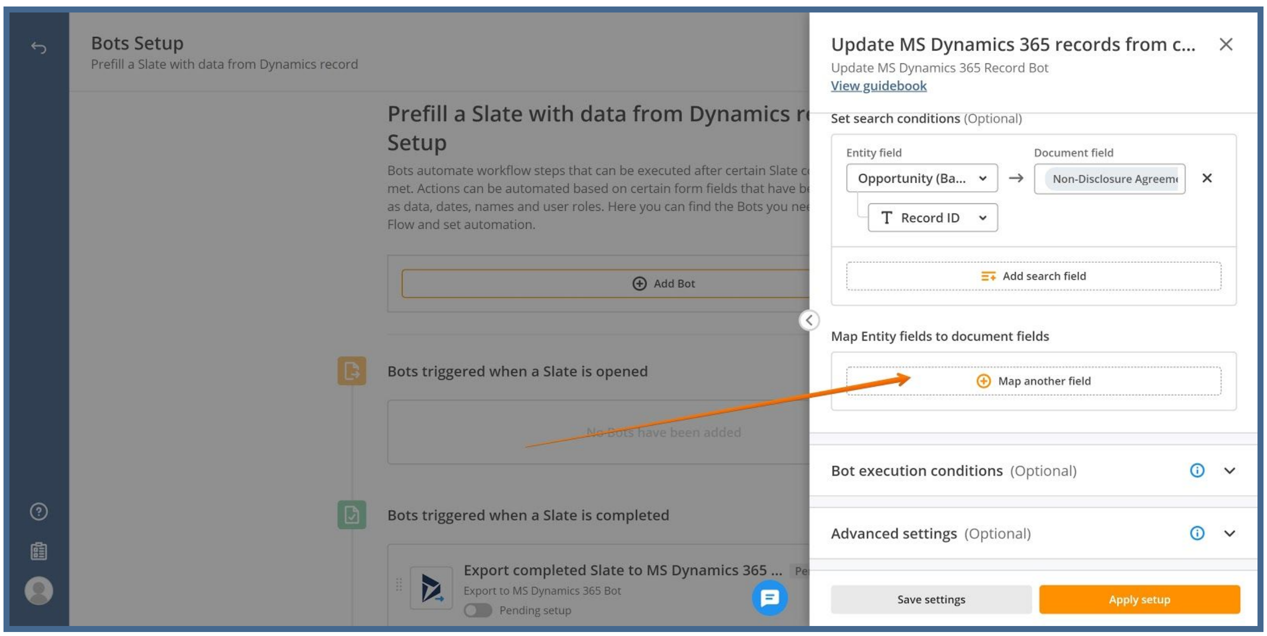
Feel free to add as many identifying values as you want. To do so, just click **Add search field** and repeat the matching.

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

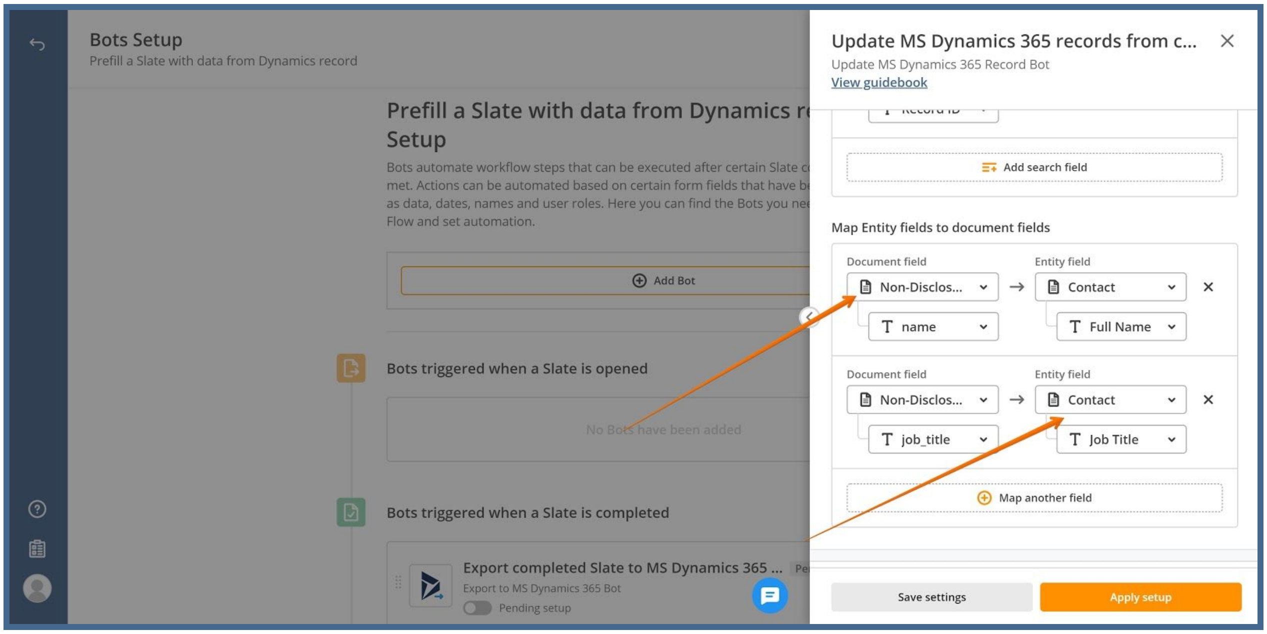
5. Map the record fields with fillable fields in the document as described in *Setup Bots: General Settings - Mapping*.

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.

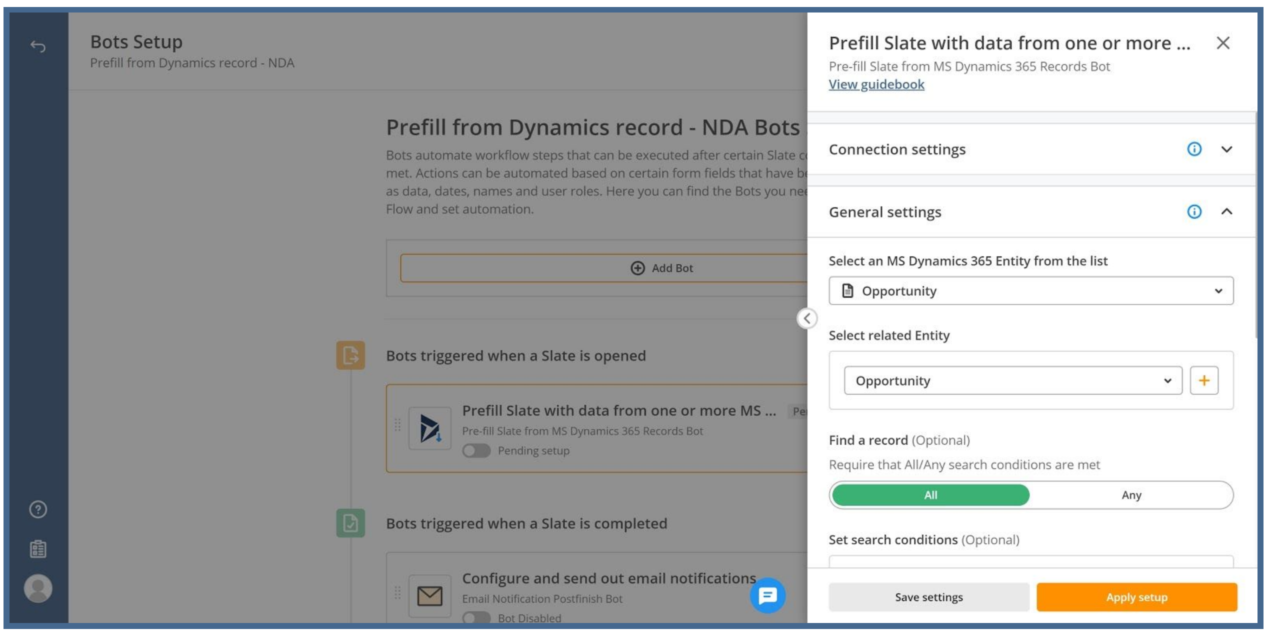
6. Make your Flow public to start using it as described in *Distribute Flow*.

Prefill a slate with data from the MS Dynamics 365 record

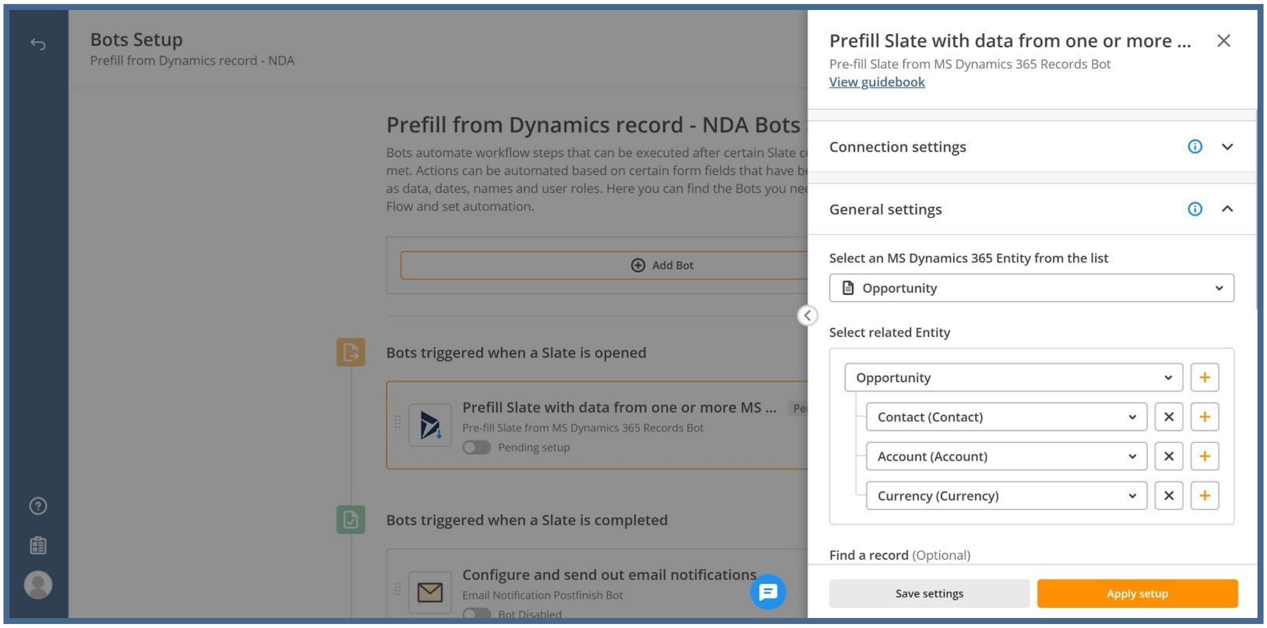
Apply the Prefill MS Dynamics 365 record bot to automatically retrieve data from the MS Dynamics 365 record and prefill a slate with it. Generate documents in MS Dynamics 365 without redundant typing in a single automated Flow.

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.



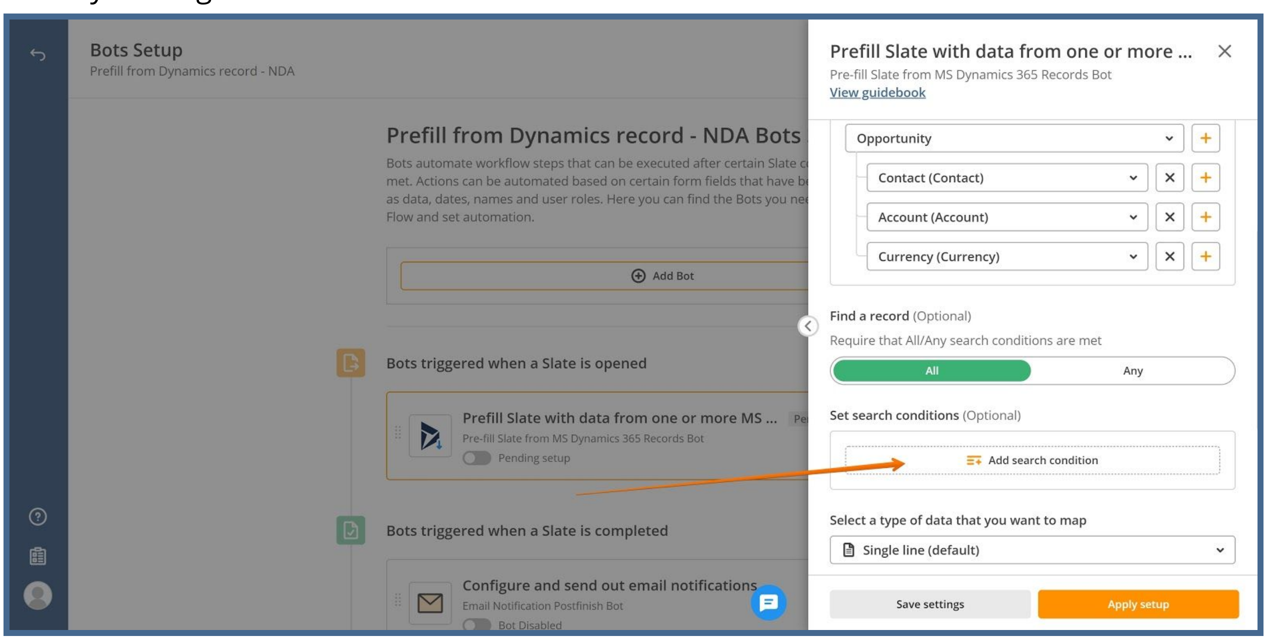
If necessary, select the related Entity as well.



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

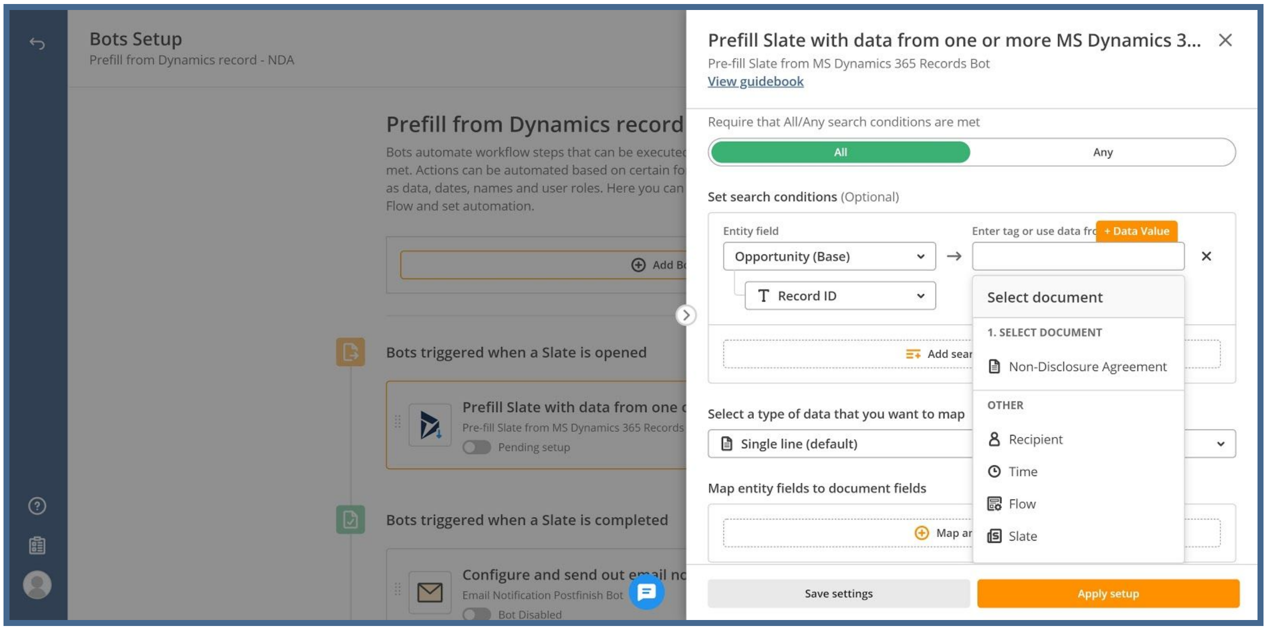
Select record fields which contain these values and link them to the fillable fields which should contain the same values in the document.

Start by clicking **Add search condition**.

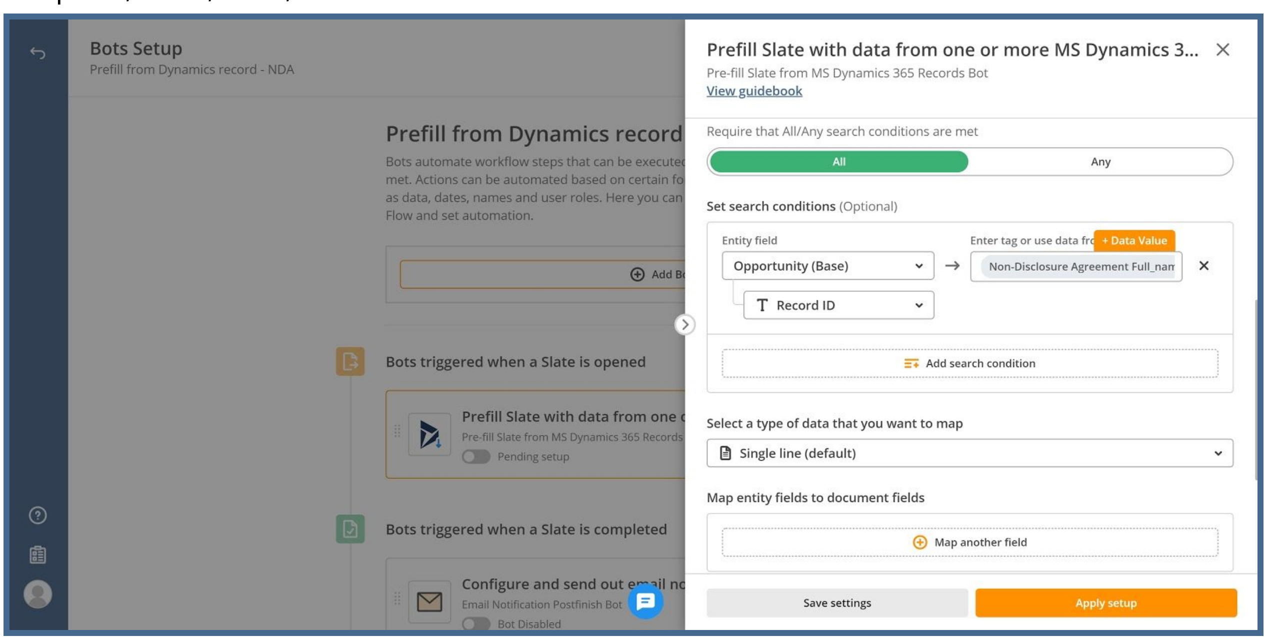


Select the **Entity field** from the dropdown, then select the **Document field** from the other dropdown under the name of your document.

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.



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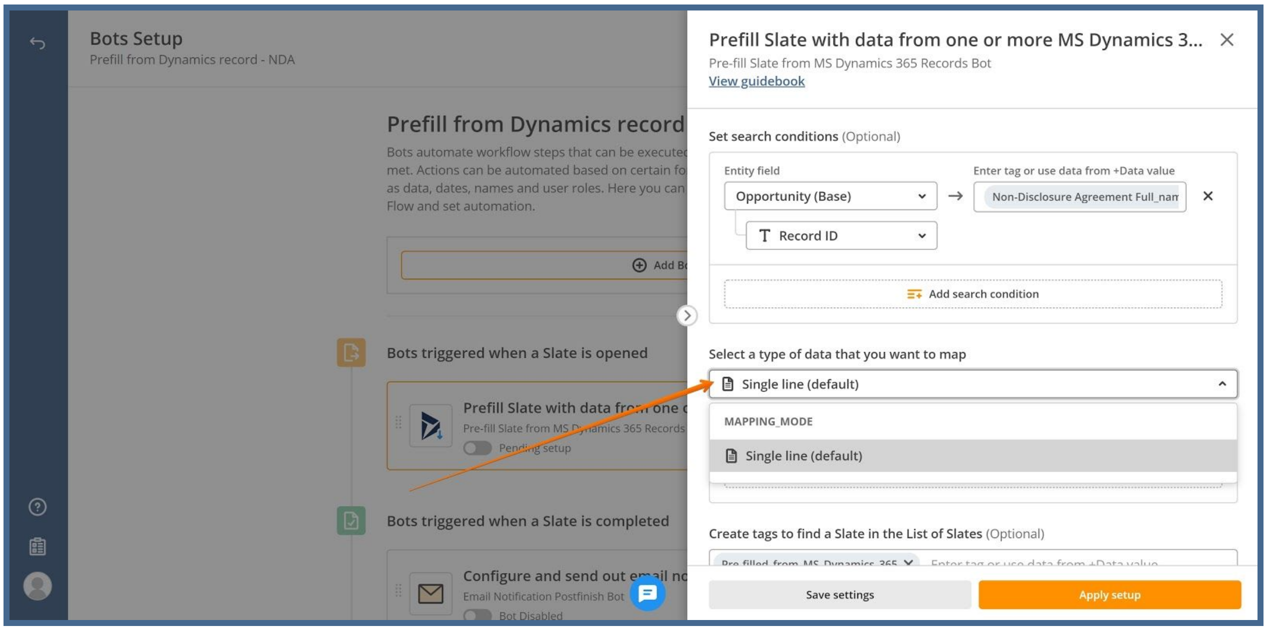
Feel free to add as many identifying values as you want. To do so, just click **Add search condition** and repeat the matching.

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

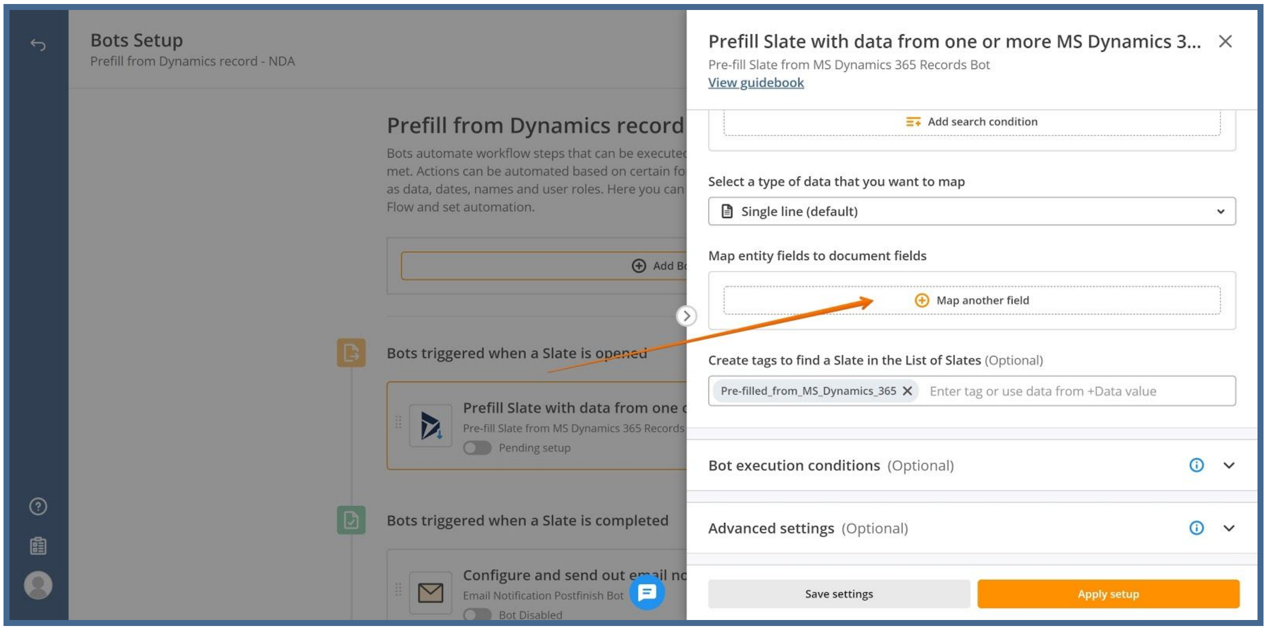
6. Set what type of data you'd like to map: simple text (*Single line*) or table values (*Table*, if your entity/document contains one).



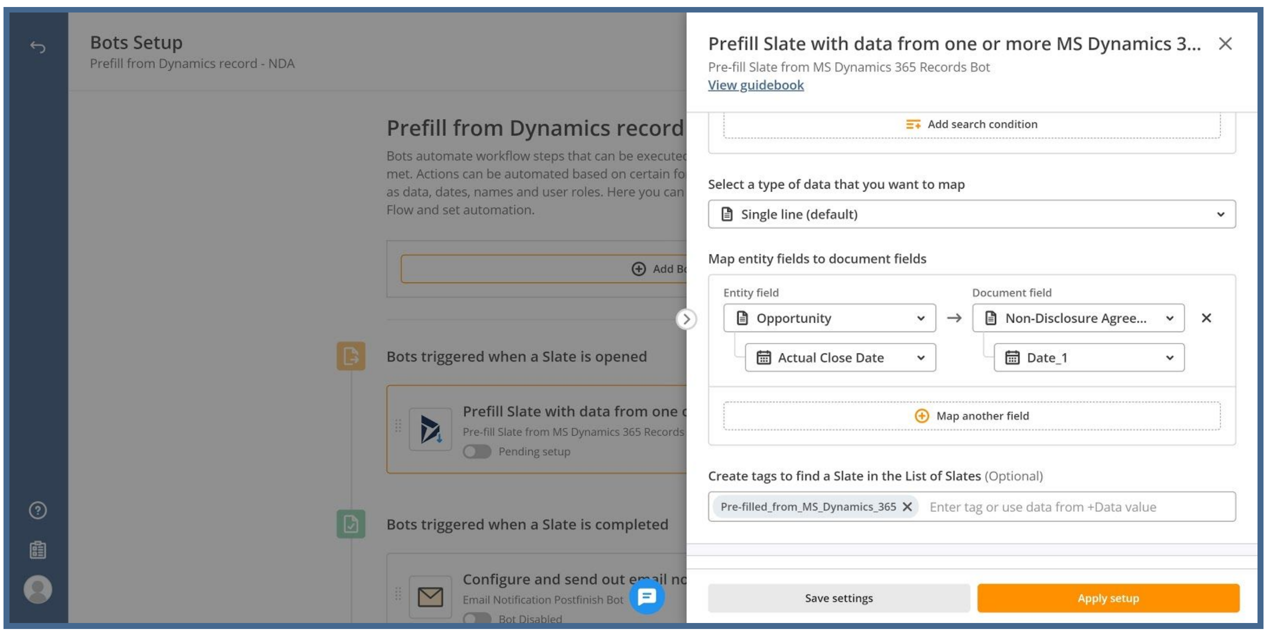
7. Map the record fields with fillable fields in the document as described in *Setup Bots: General Settings - Mapping*.

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

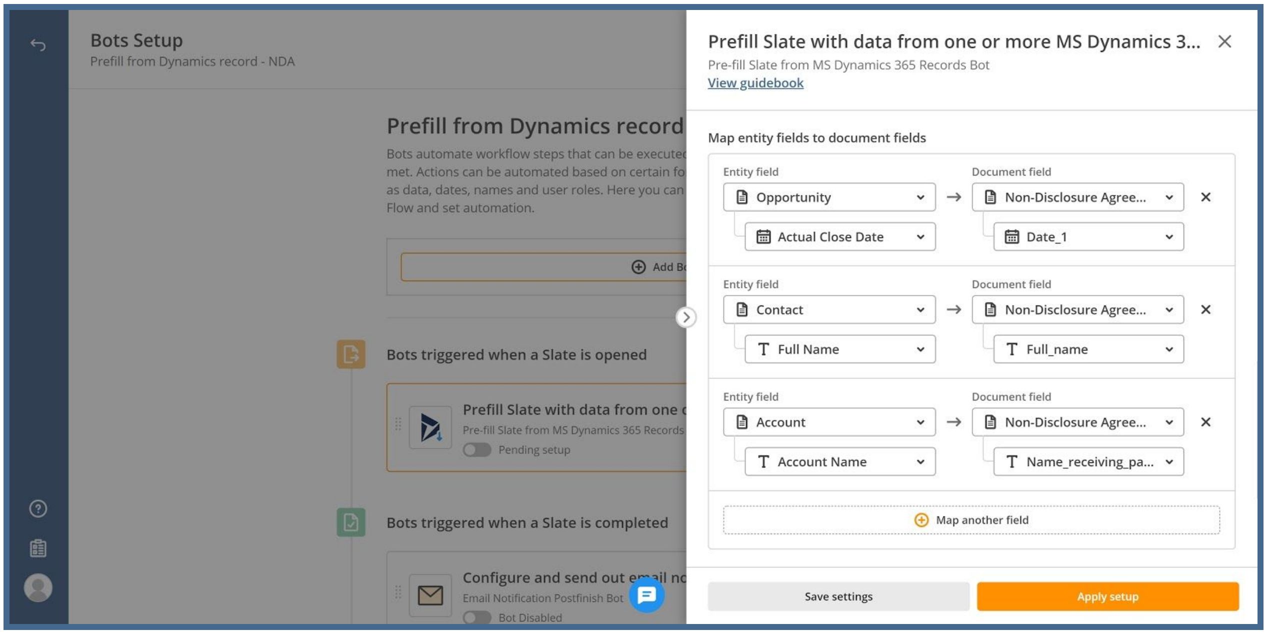
Start with clicking **Map another field**.



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*

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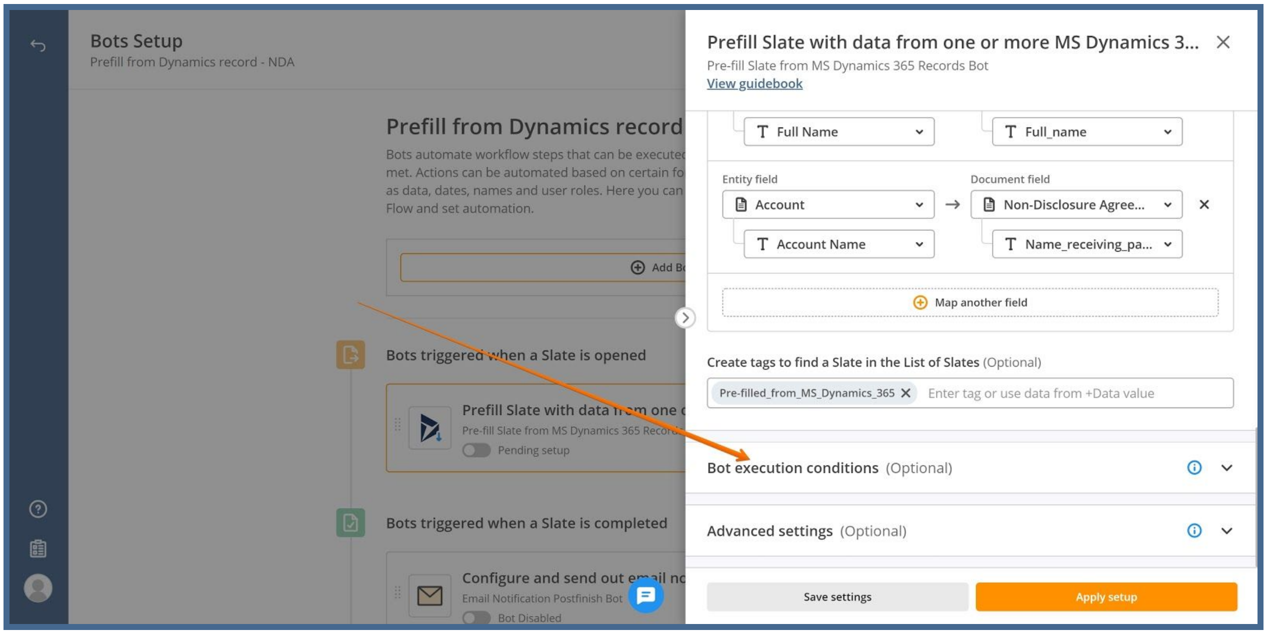
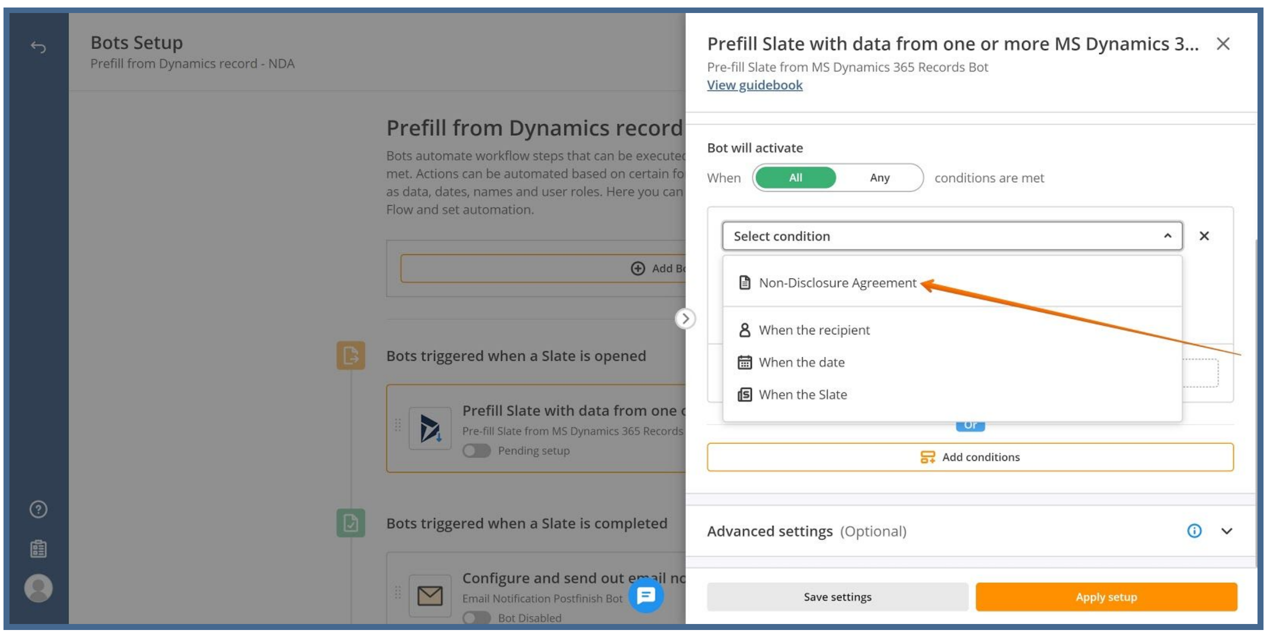


- In *Select condition,* go to the name of the document in the Flow



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

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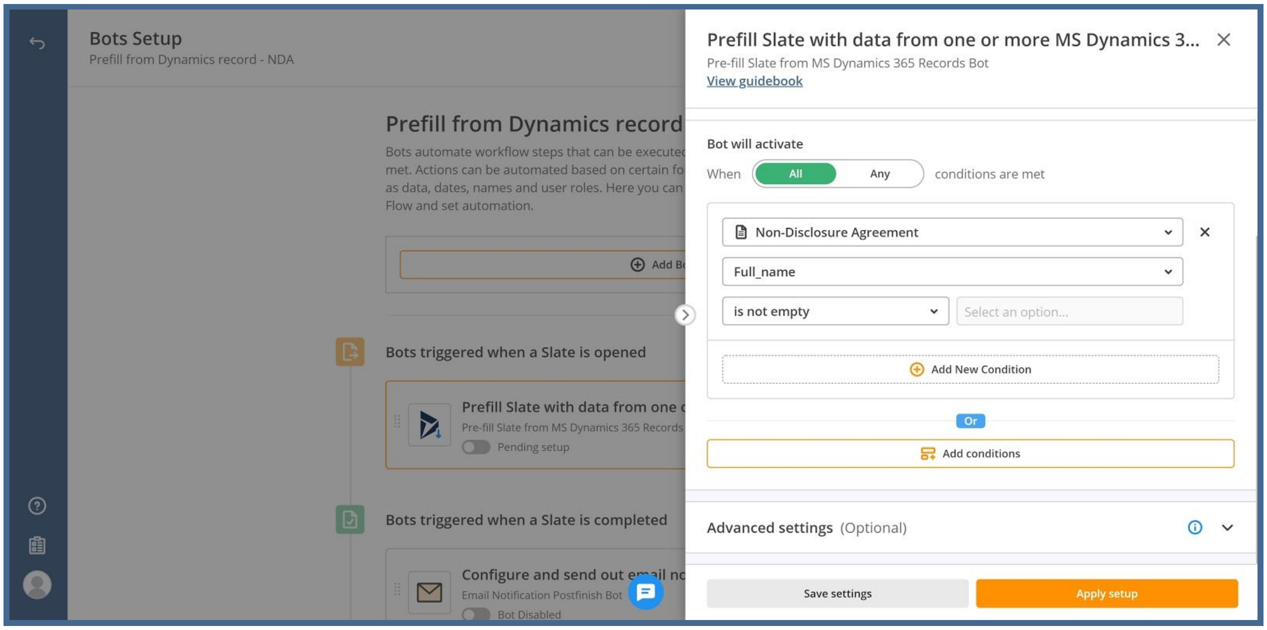
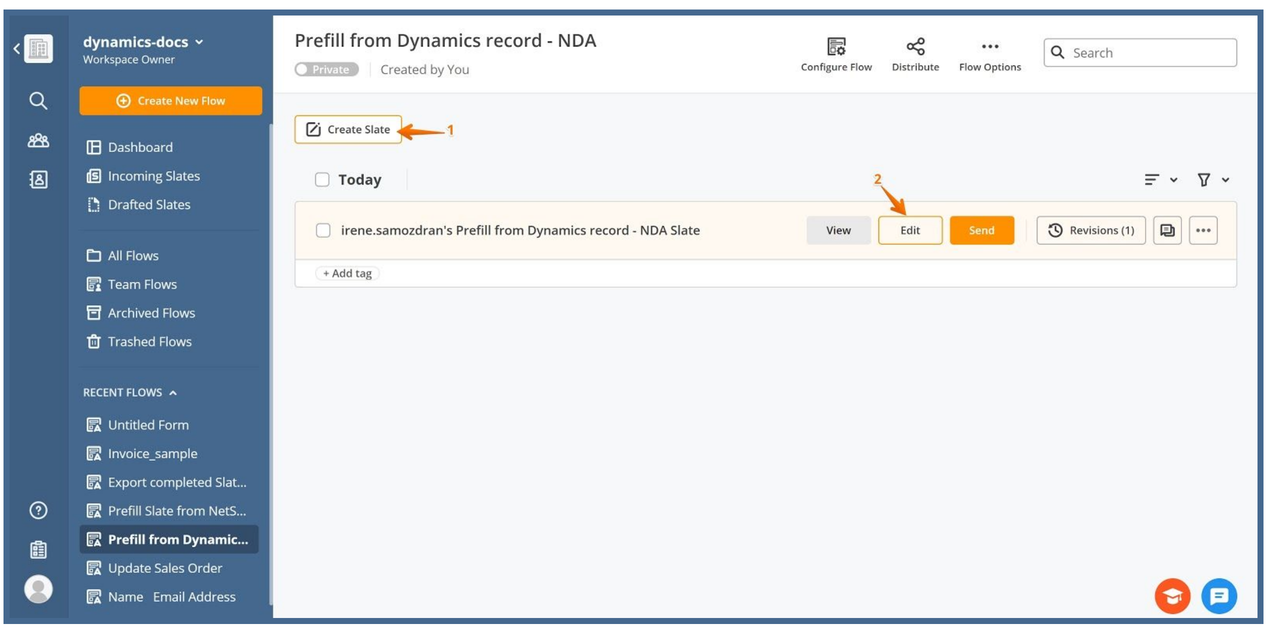


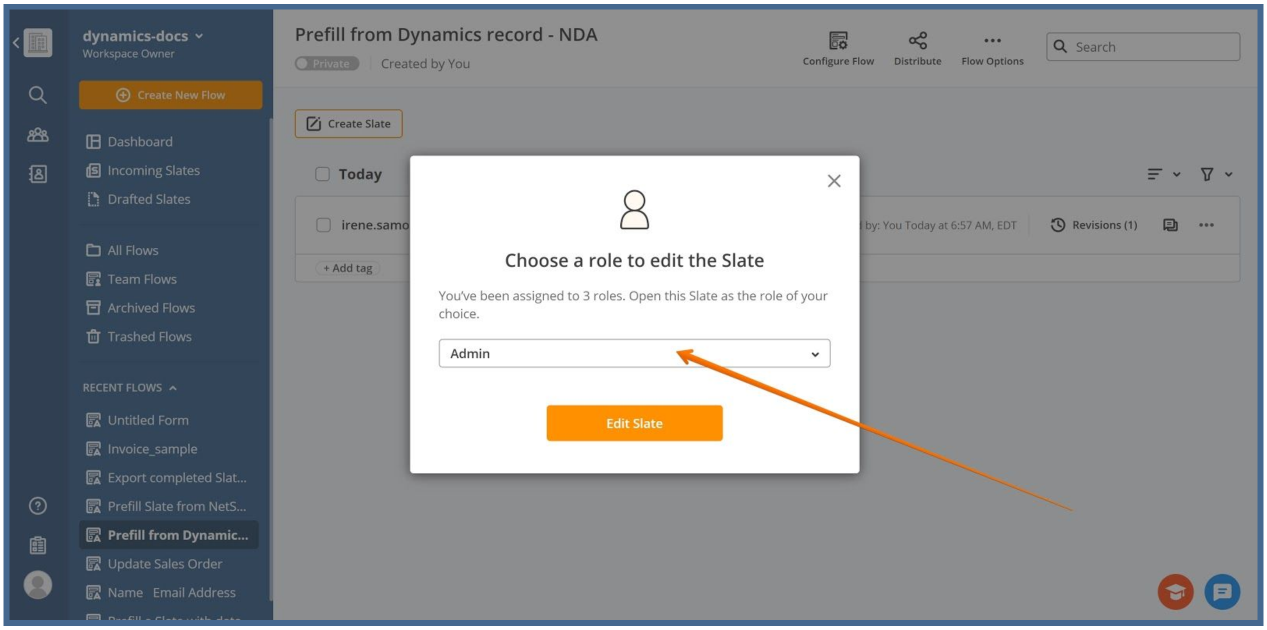
Click **Apply setup** when you're done.

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.



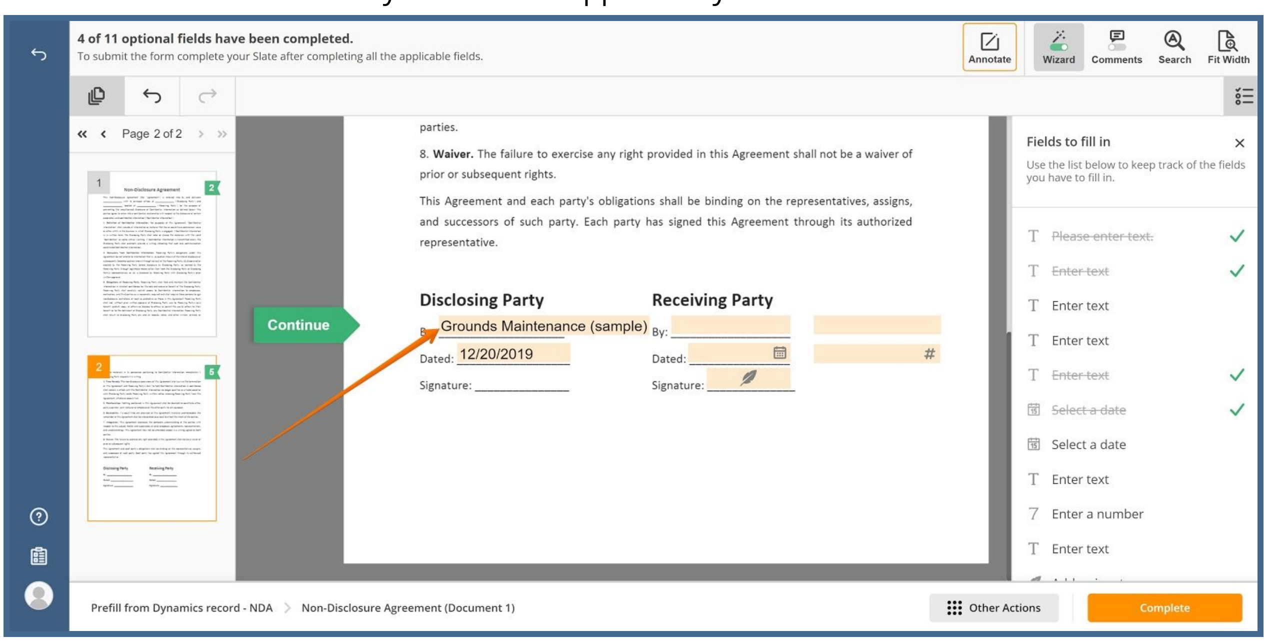
- Select Admin as your role for editing a Slate.



- **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.



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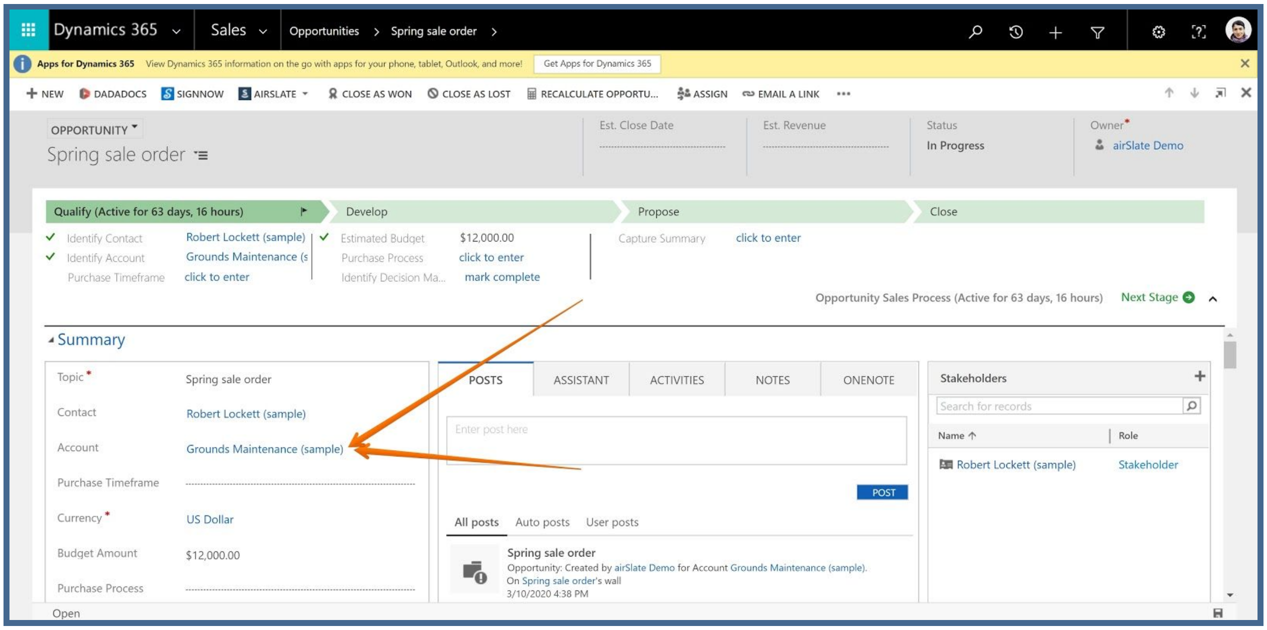
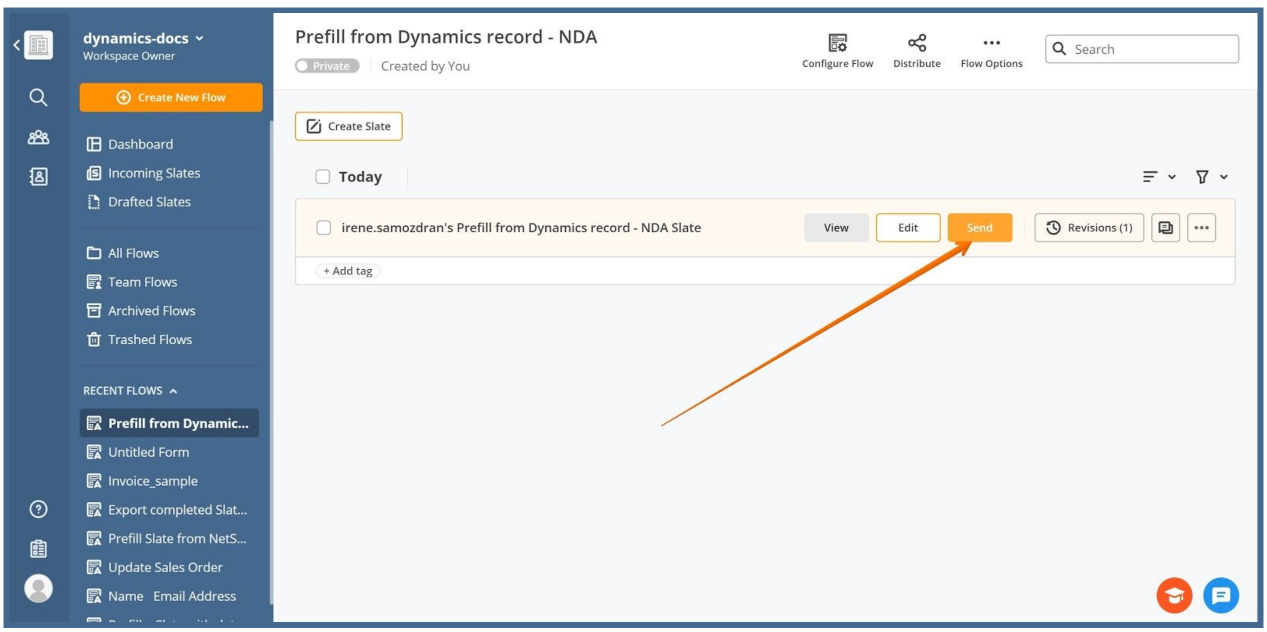


- Only after this, send a Slate.



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.

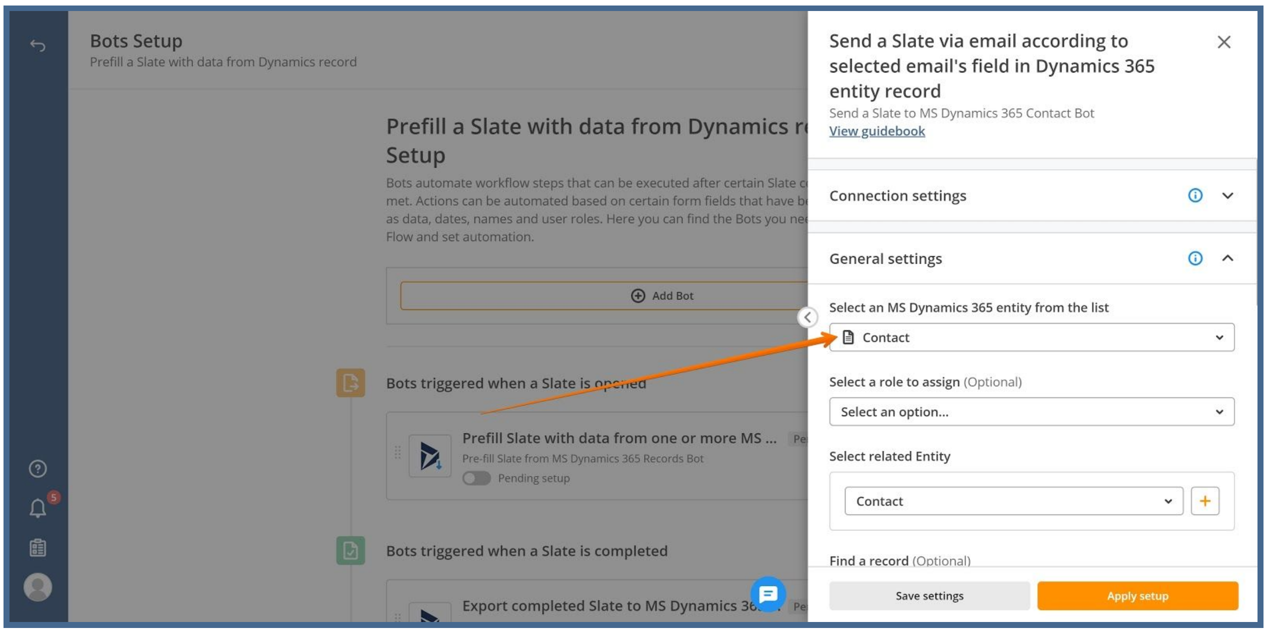
8. Make your Flow public to start using it as described in *Distribute Flow*.

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.

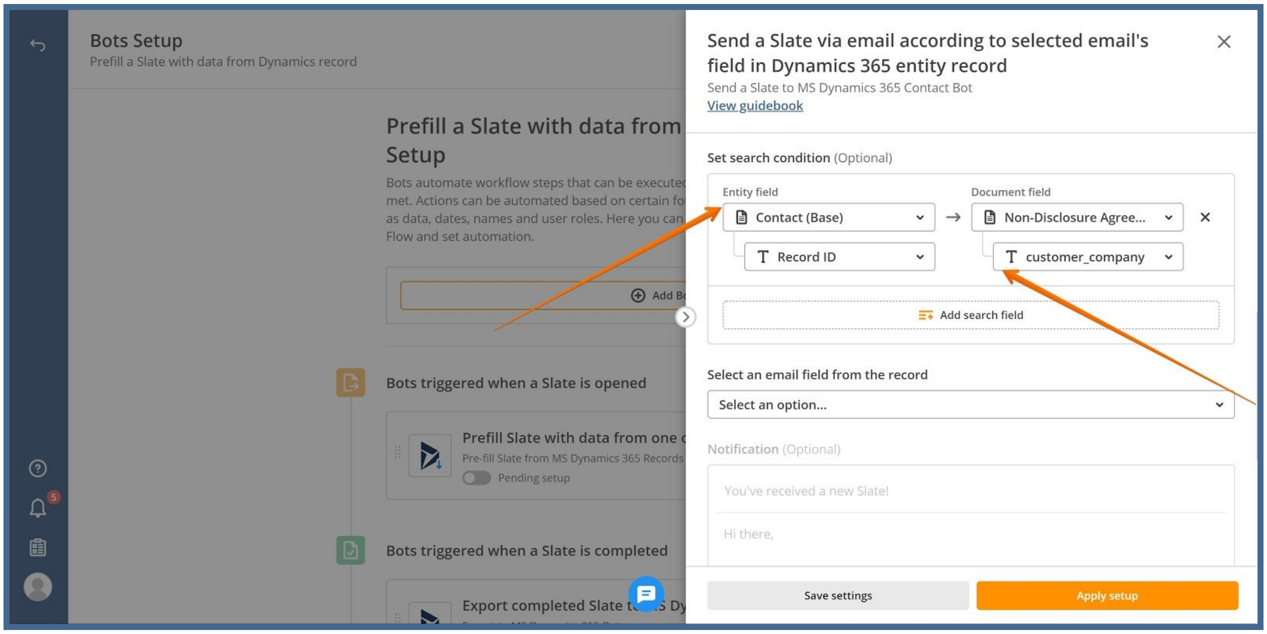
All entities are listed in the dropdown for your convenience.



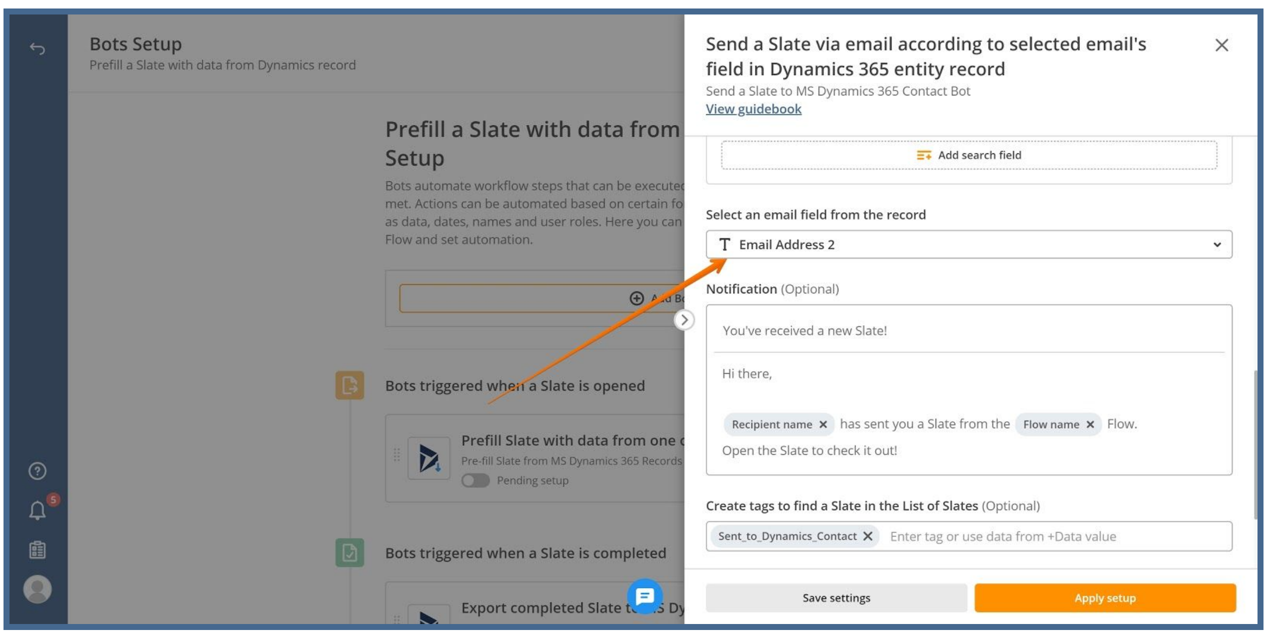
4. Select a role to assign (if necessary).
5. Select the related entities (if necessary).
6. Identify the record to retrieve data from as described in *Setup Bots: General settings - Find a record*.

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

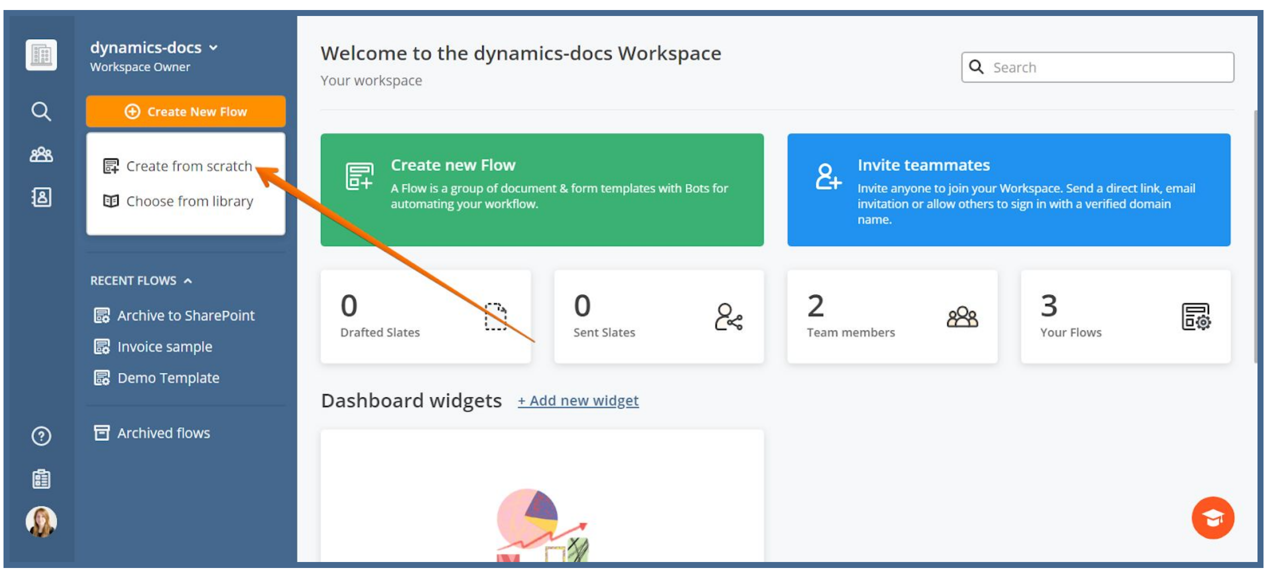
Requirements:

- 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.

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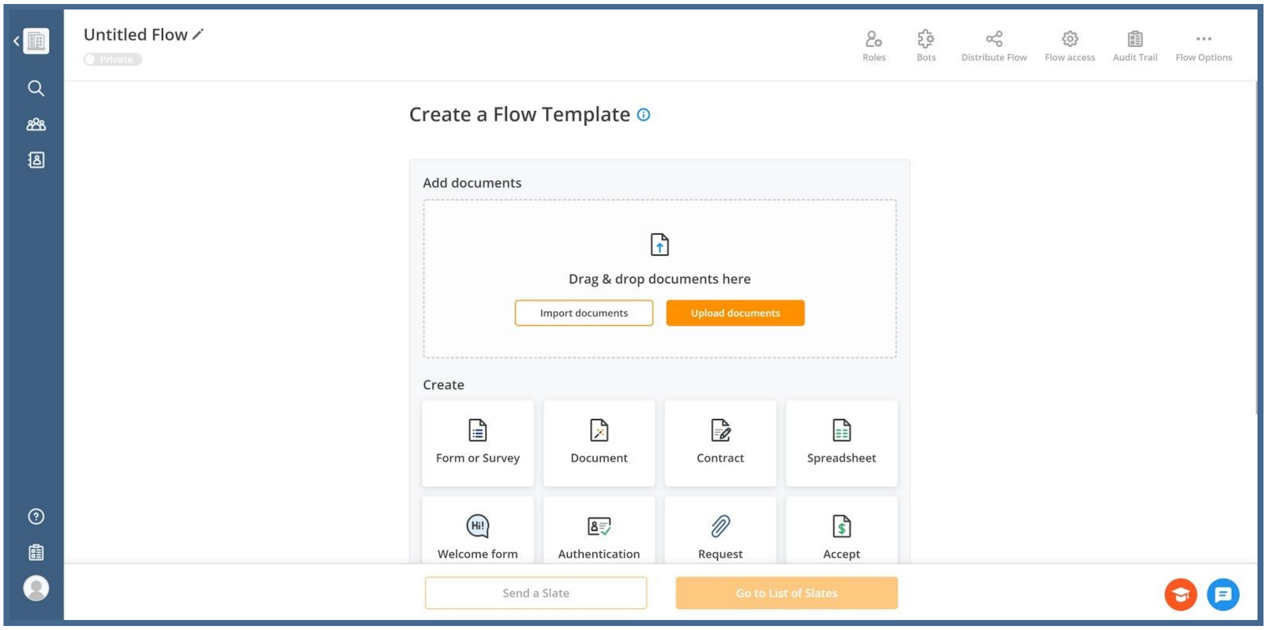
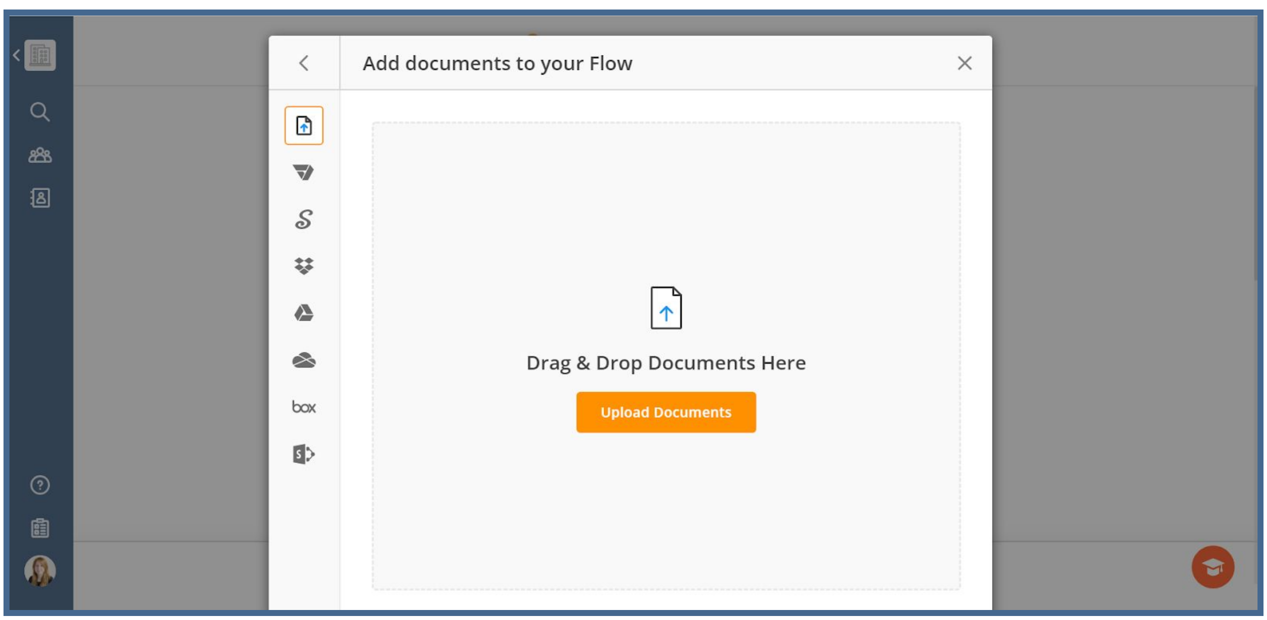
Let's use an NDA Agreement for this example. There are three different options to add a document to your Flow.

- *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





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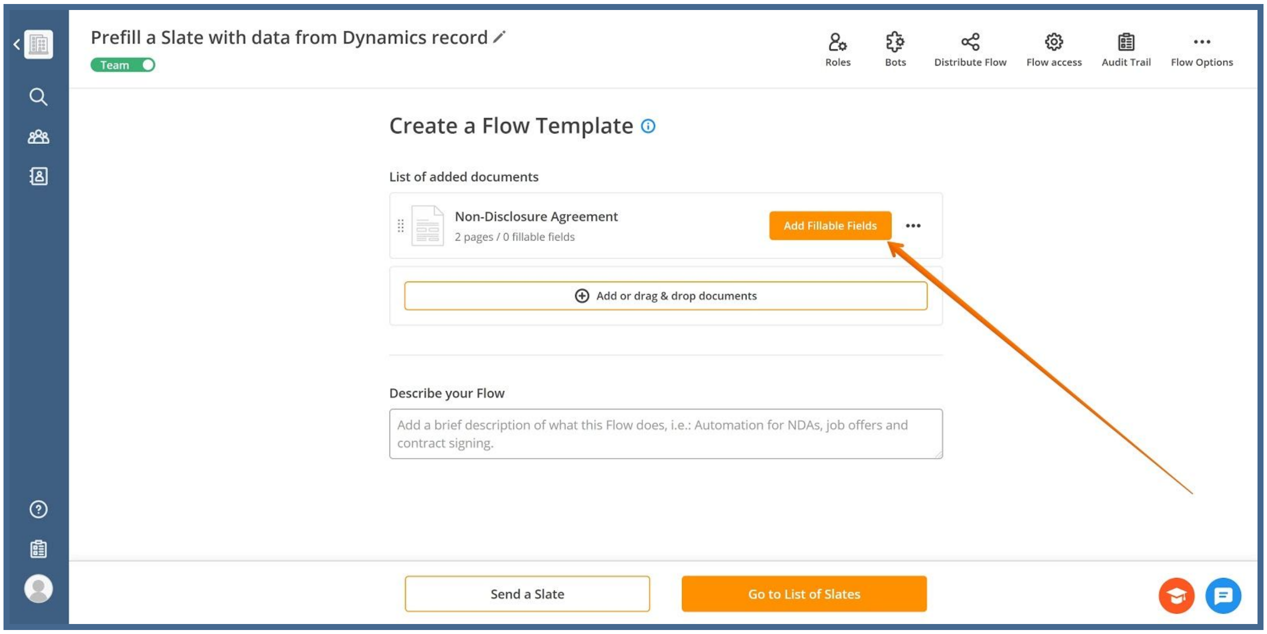
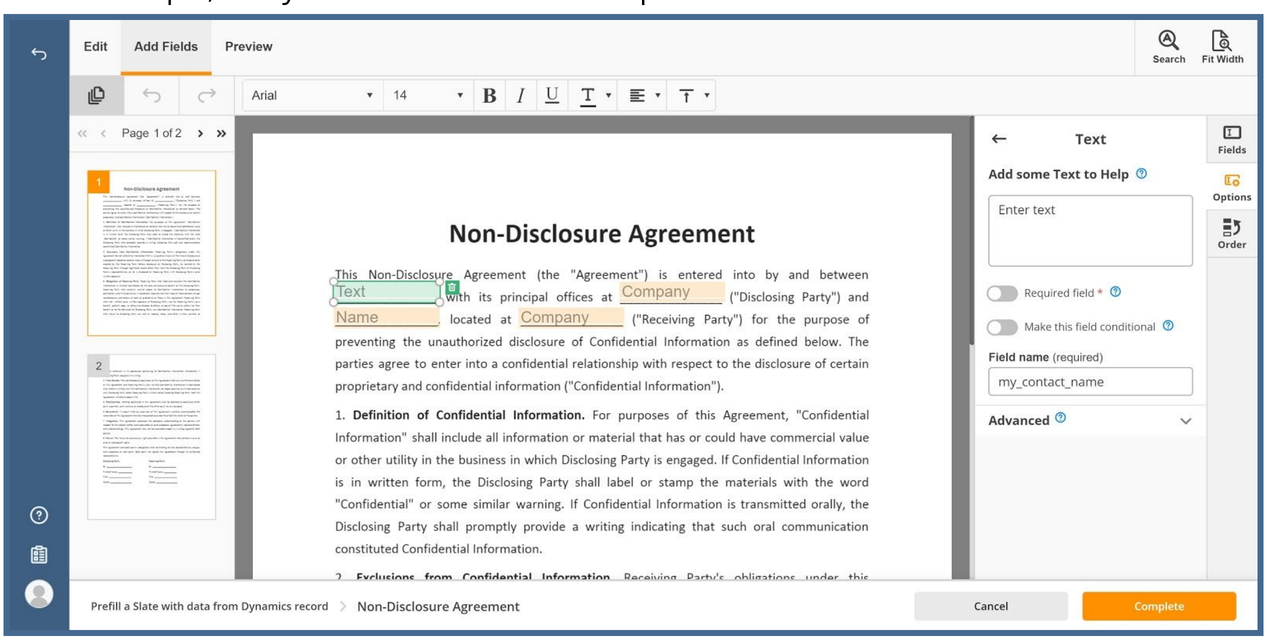
3. Add fillable fields to your document.



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:



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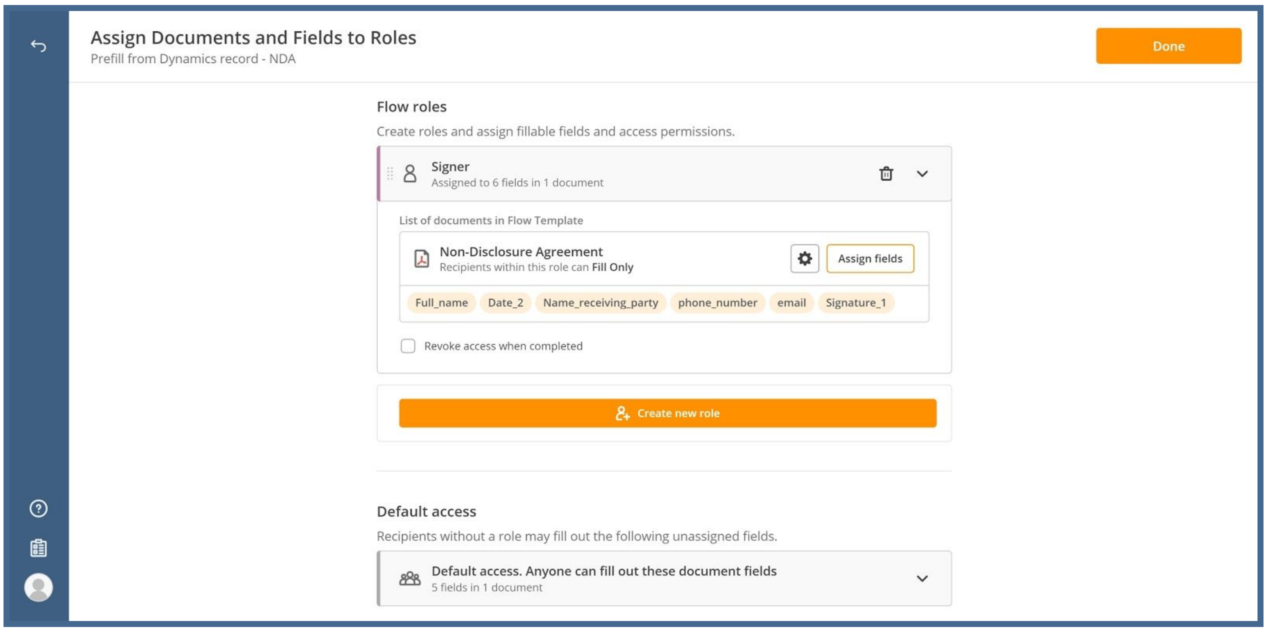
Click **Complete** in the bottom right when you're done with fillable fields.

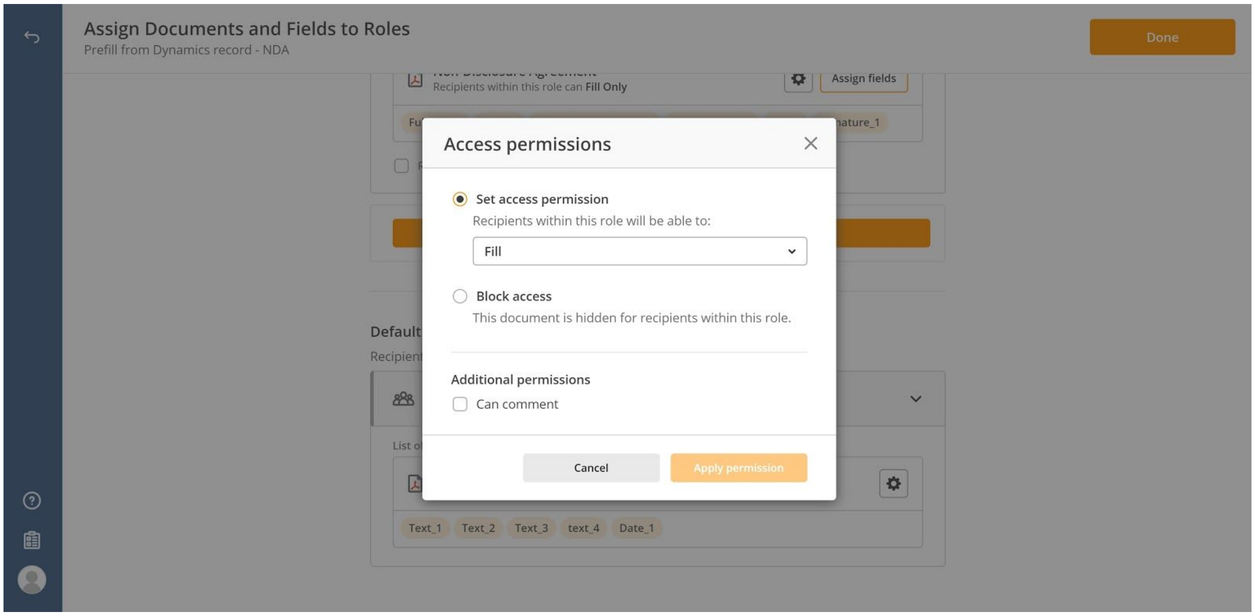
Roles

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.

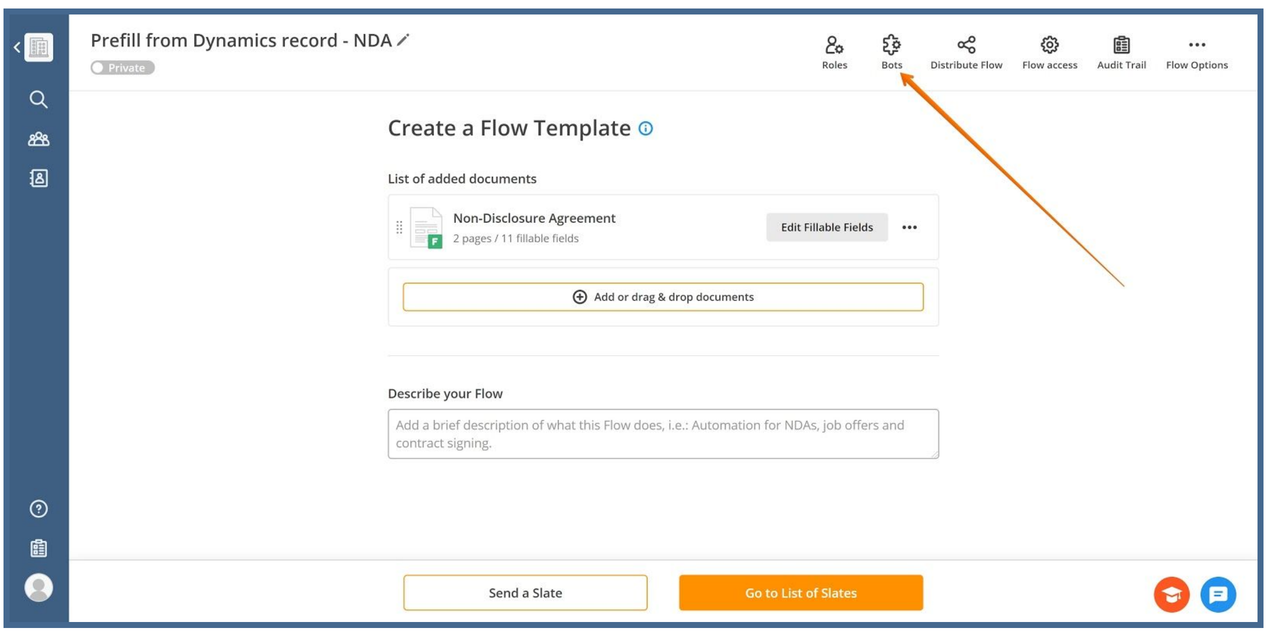
- Under the role name, click **Assign fields** to select fillable fields for this role. Recipients under this role will be able to act on these fields depending on the set role access permission.
- Assign access permissions and fillable fields to the other documents the same way.
- Click **Create new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



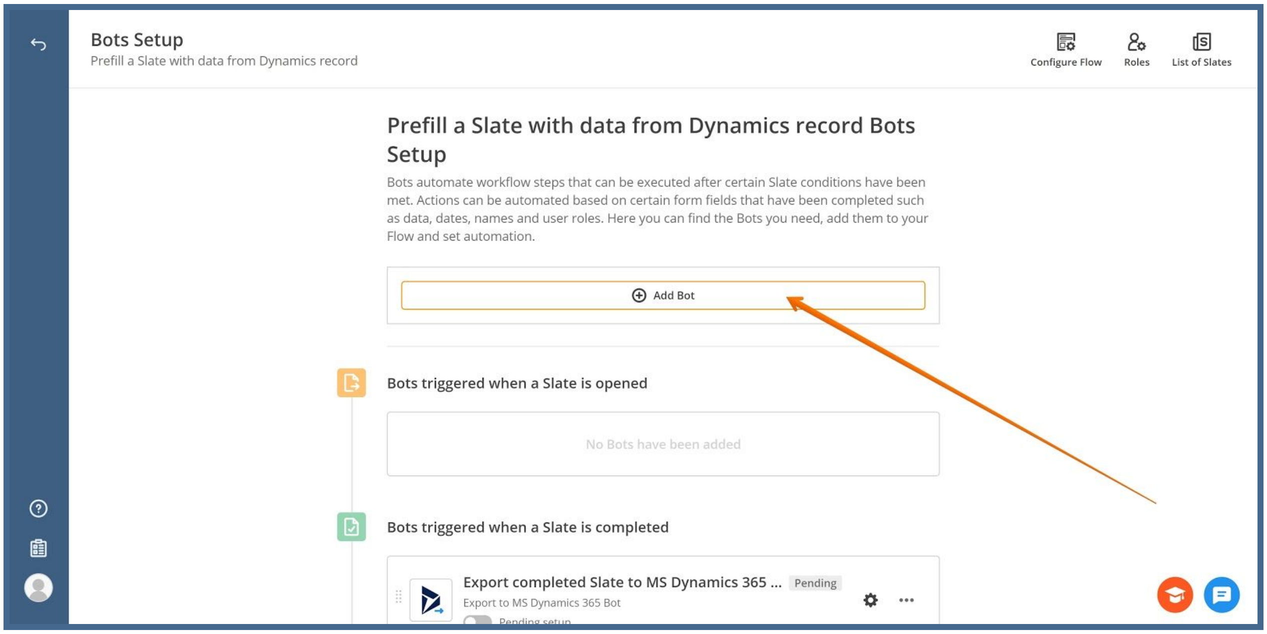
- In Default access, click the gear button to set access permissions for this document (Fill (default), or Read (only viewing the document). Check **Block access** to hide the fields for this role; check **Can comment** to allow recipients comment on the Slate.



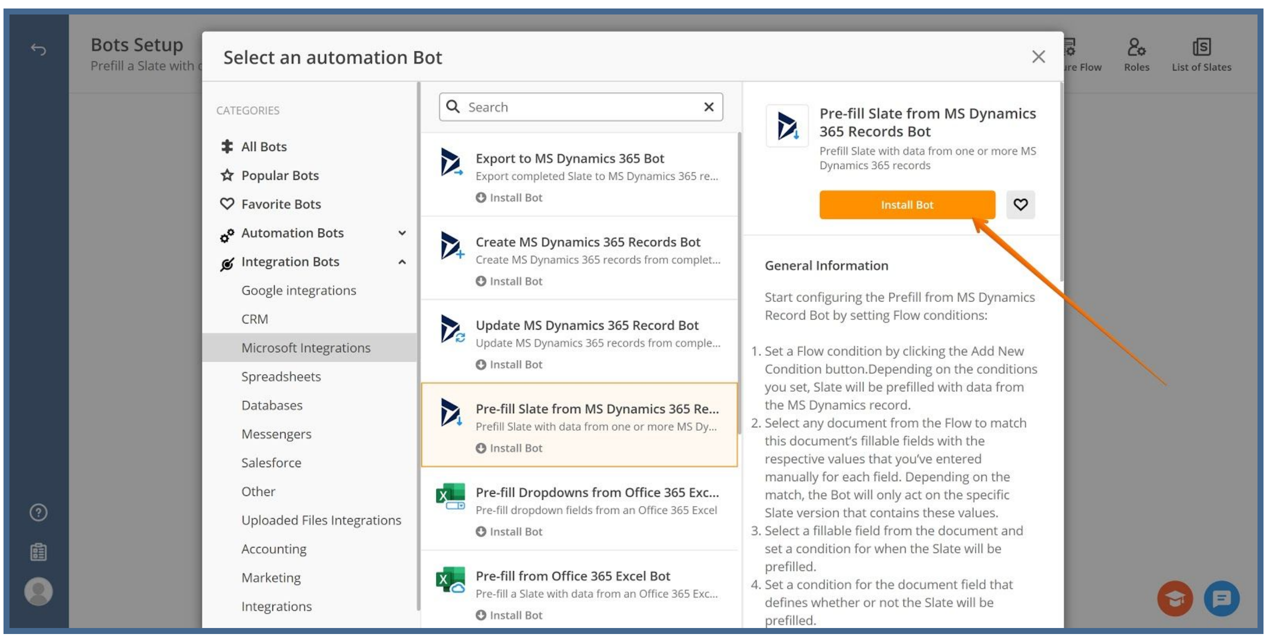
4. Go to **Bots**.



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.



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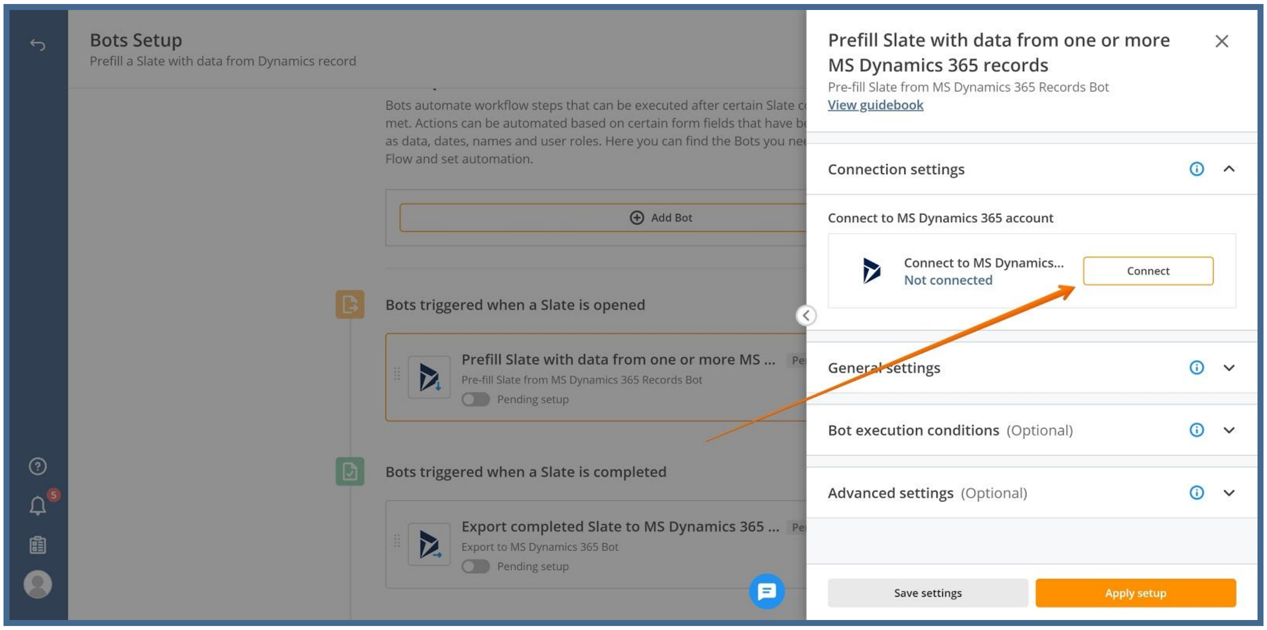
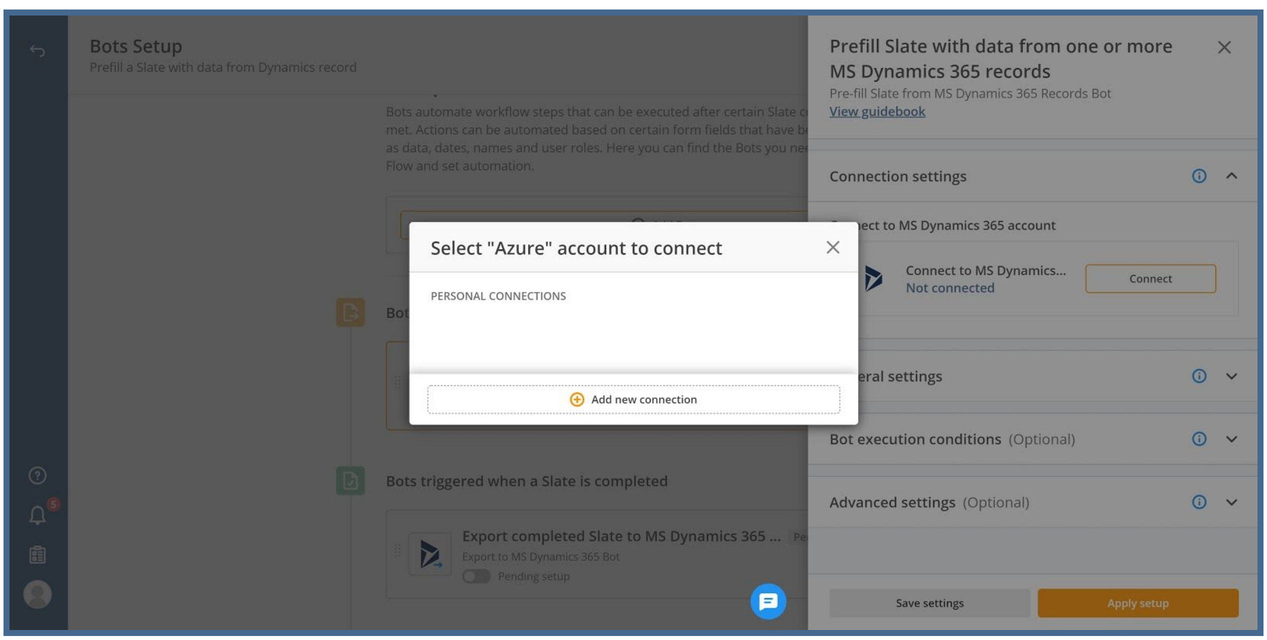
Stage 2. Connect the Dynamics 365 account to the Prefill from Dynamics 365 bot

7. Connect your Dynamics 365 account.



Click **Add new connection**.



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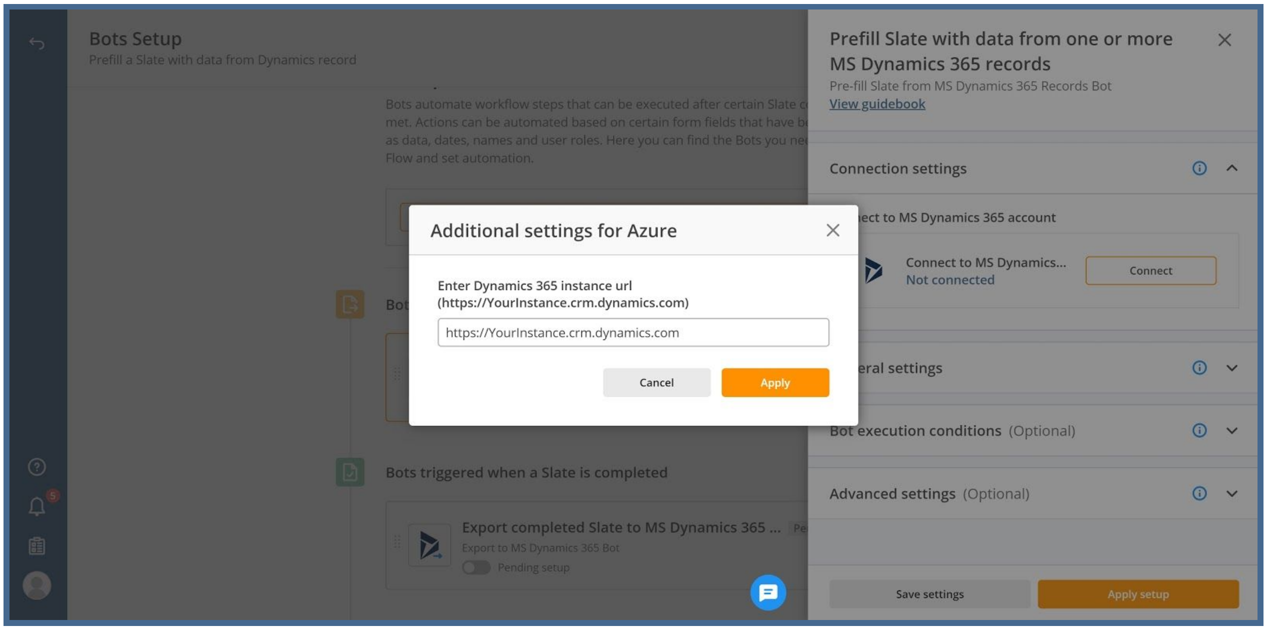
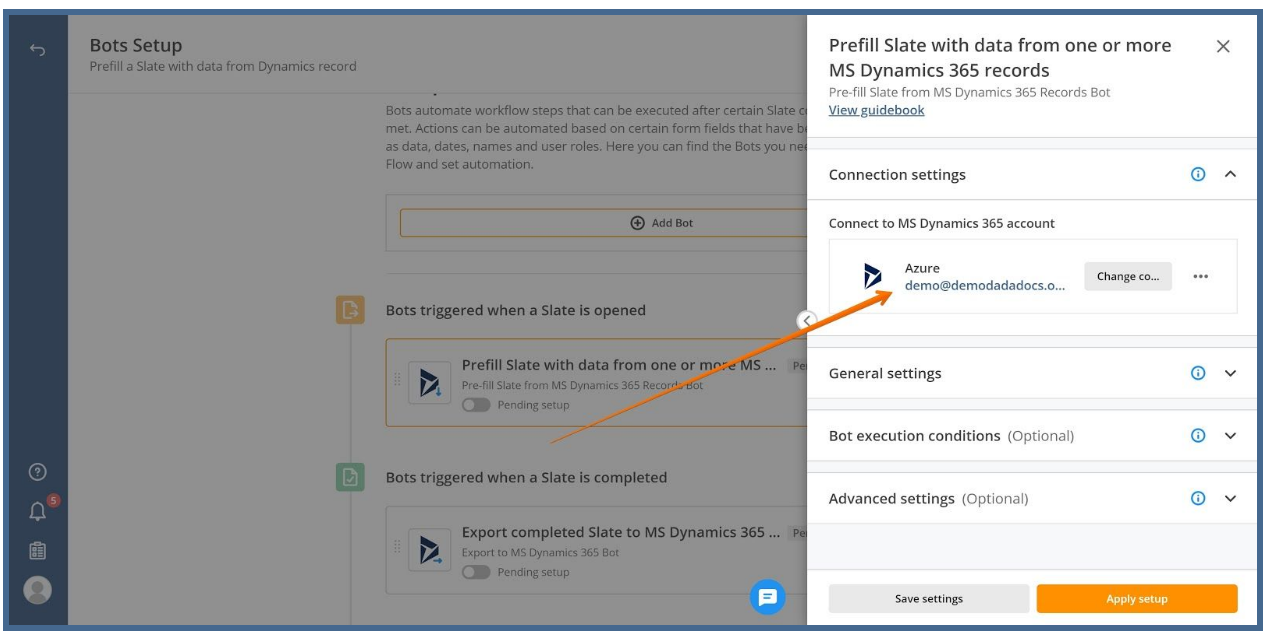
Insert the URL to your Dynamics organization and click **Apply**.



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.

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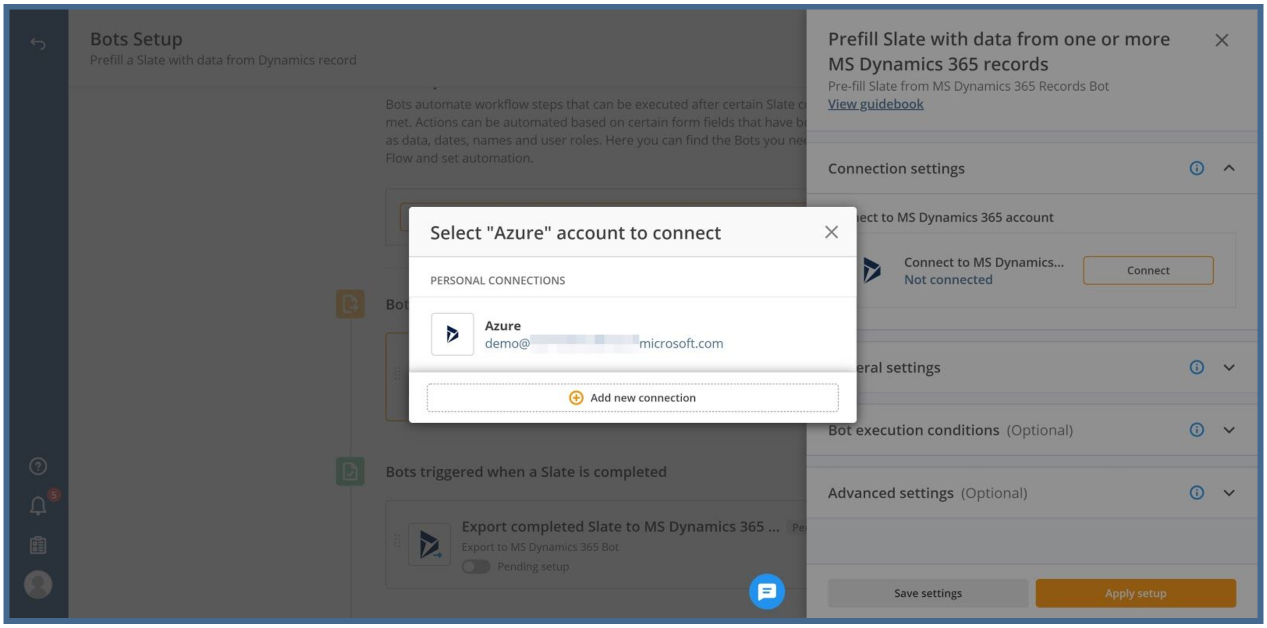
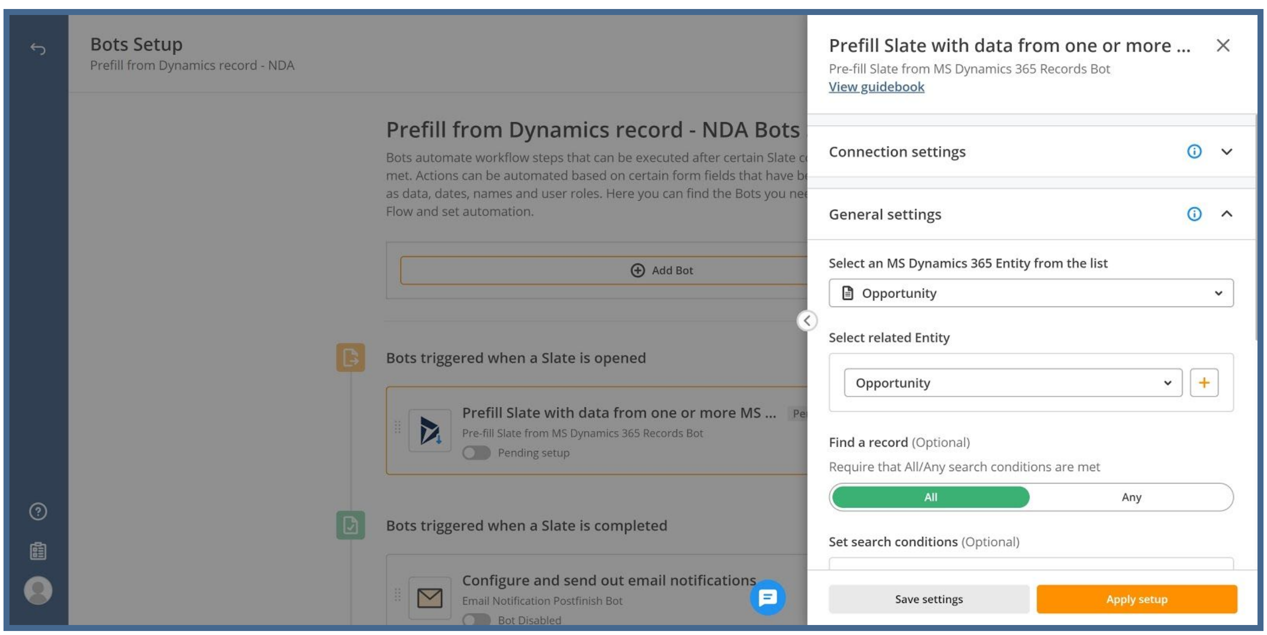
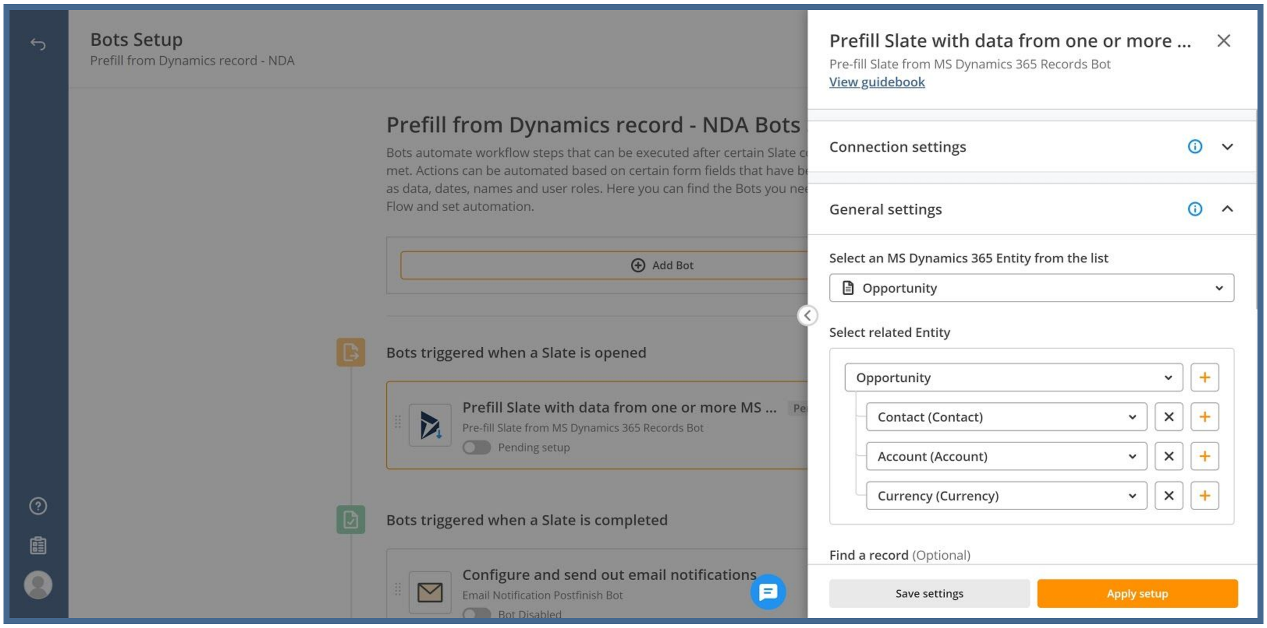


8. Select the Dynamics entity - the type of record to pre-fill a slate from (i.e. Contact, Opportunity, Account).

All entities are listed in the dropdown for your convenience.

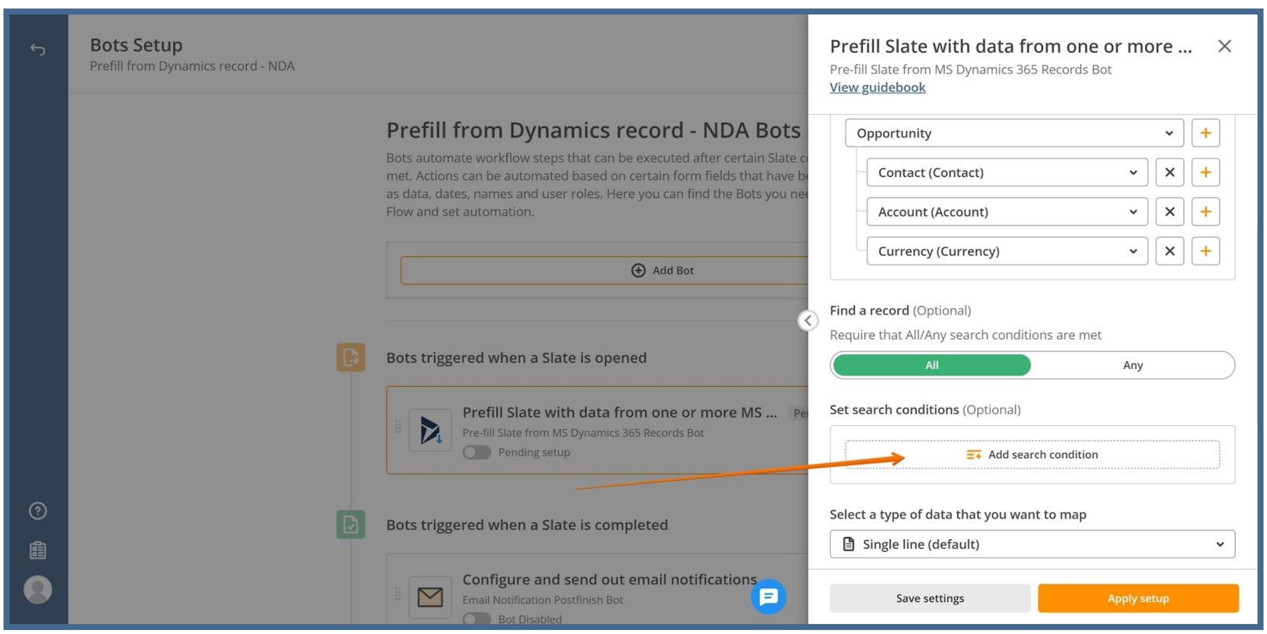


If necessary, select the related entities.



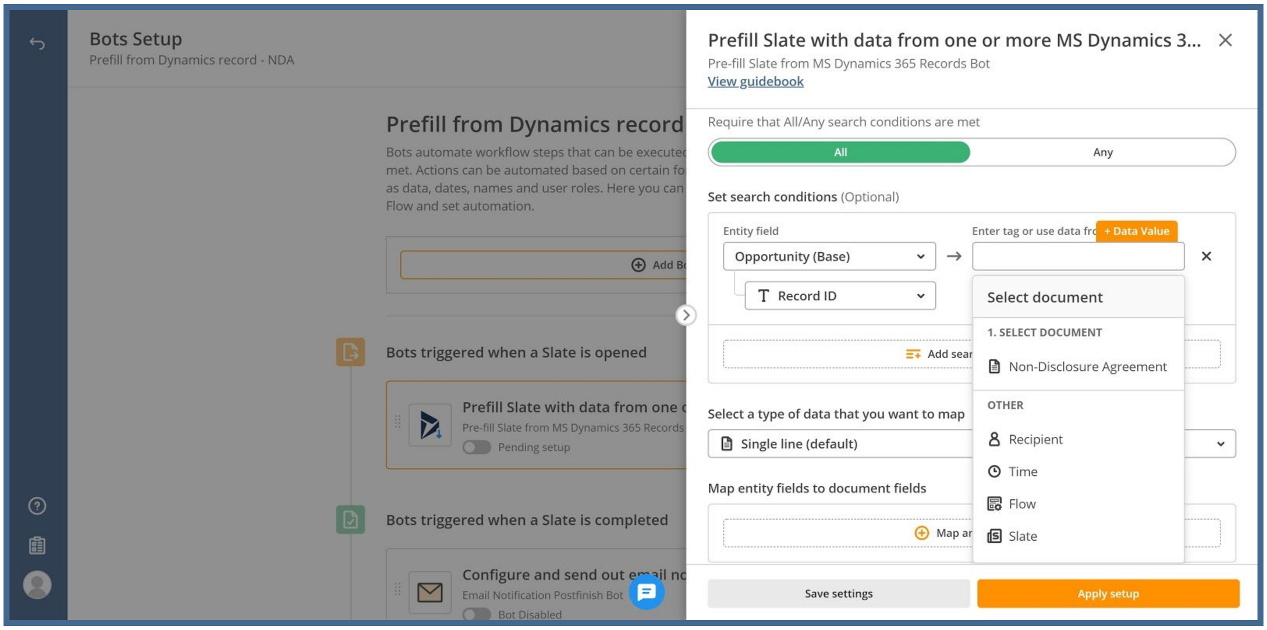
9. Identify the record to retrieve data from as described in *Setup Bots: General settings - Find a record*.

Start by clicking **Add search condition**.

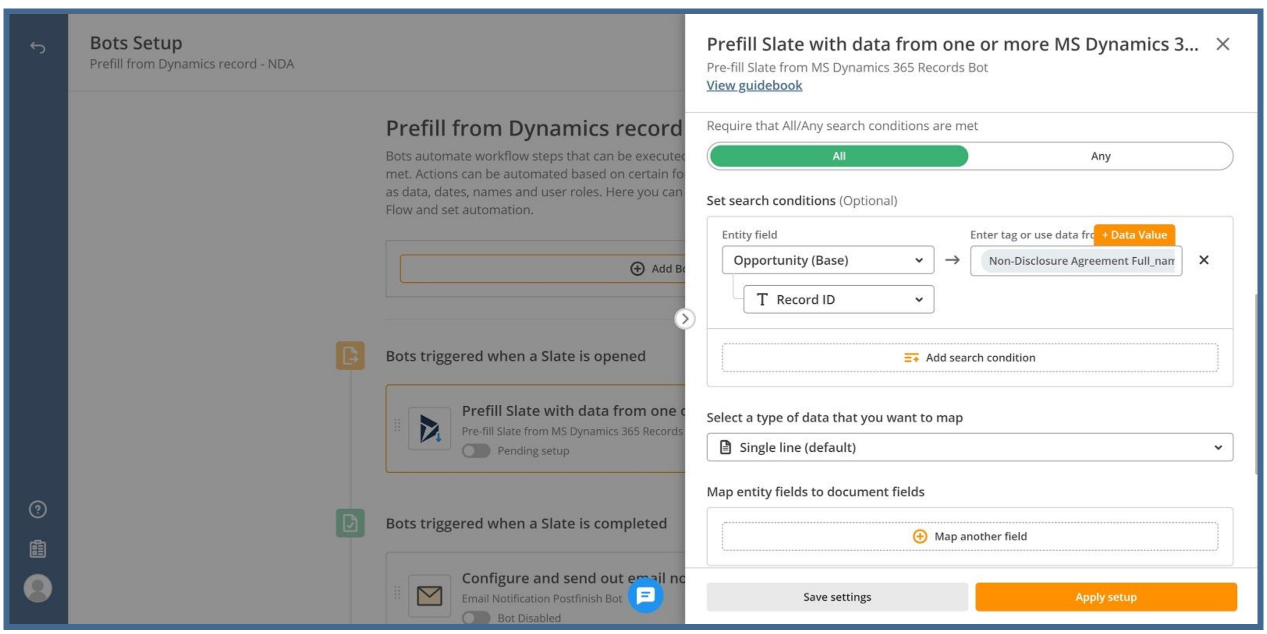


Select the **Entity field** from the dropdown, then select the **Document field** from the other dropdown under the name of your document.

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.

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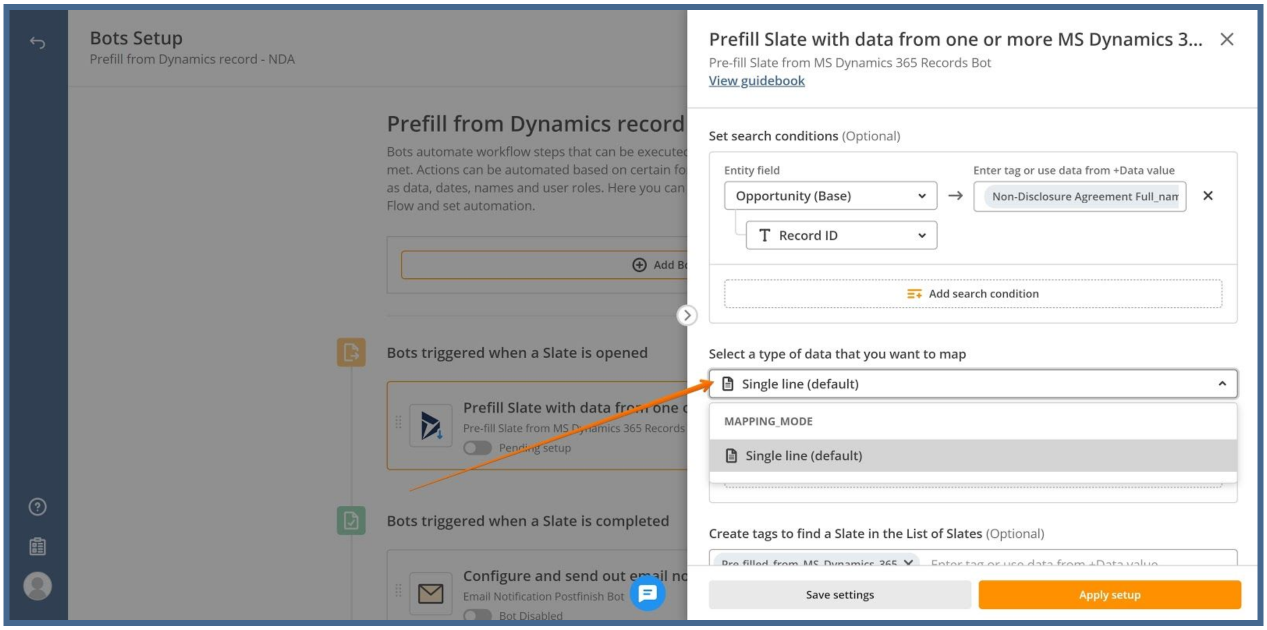
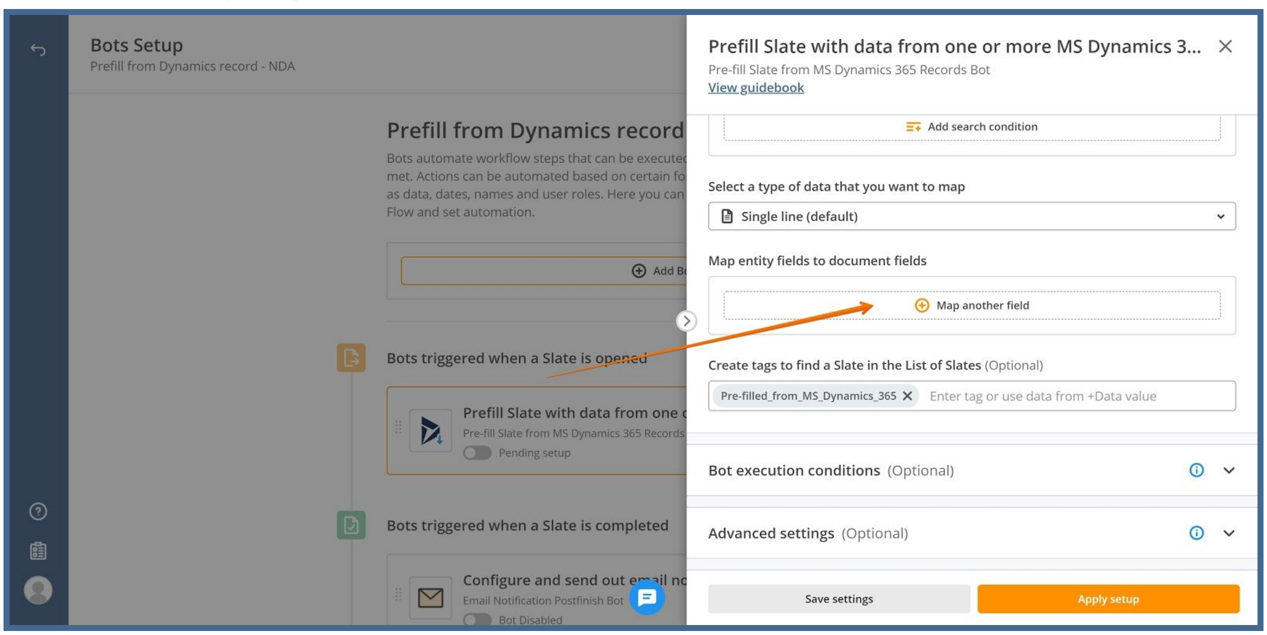
10. Set what type of data you'd like to map: simple text (*Single line*) or table values (*Table*, if your entity/document contains one).

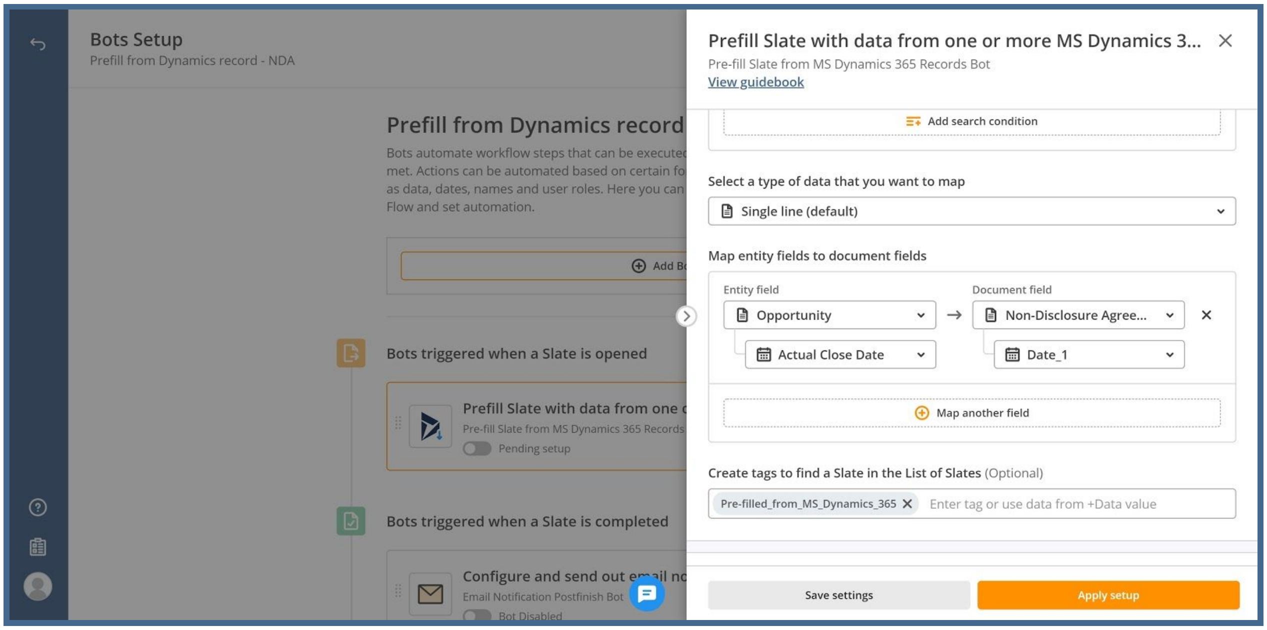


11. Map the record fields with fillable fields in the document as described in *Setup Bots: General Settings - Mapping*.

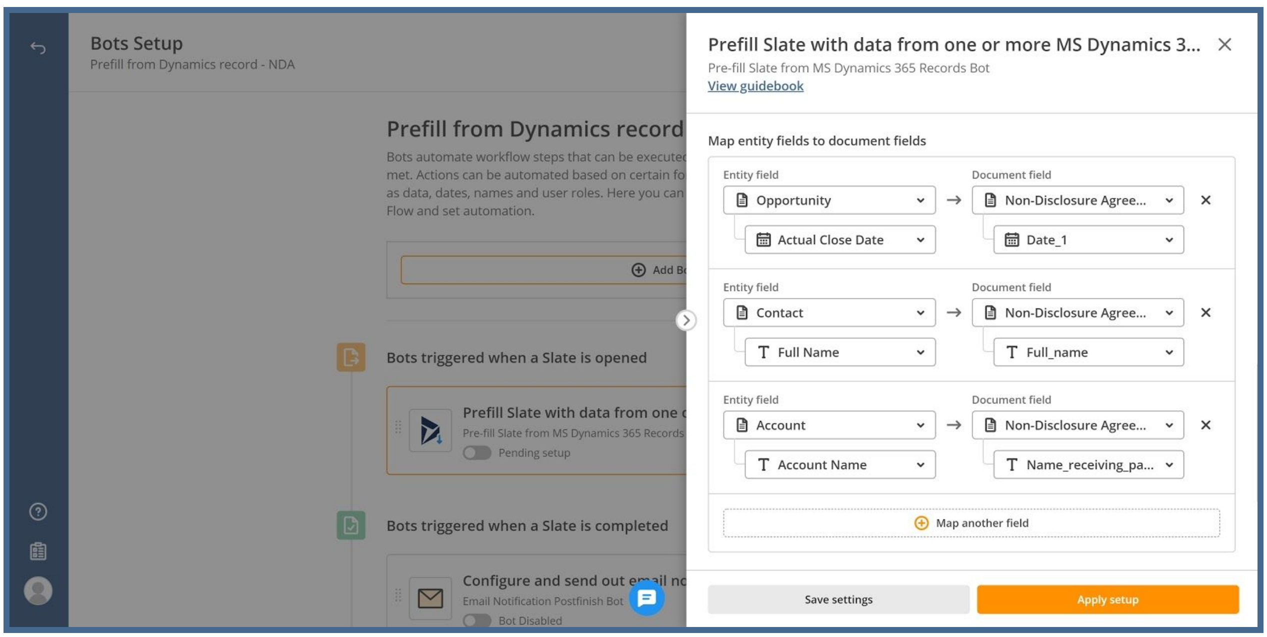
Start with clicking **Map another field**.



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



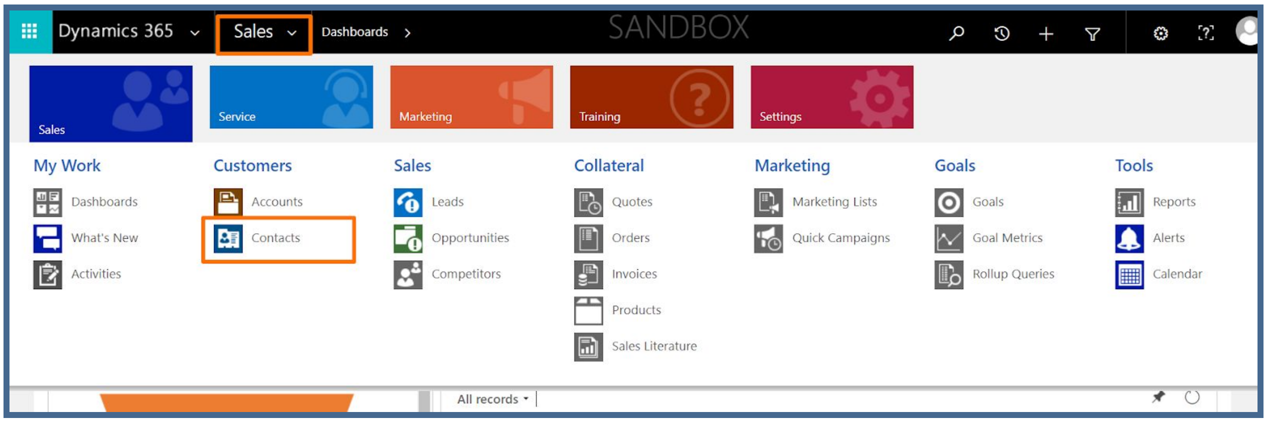
Repeat the mapping for every field.

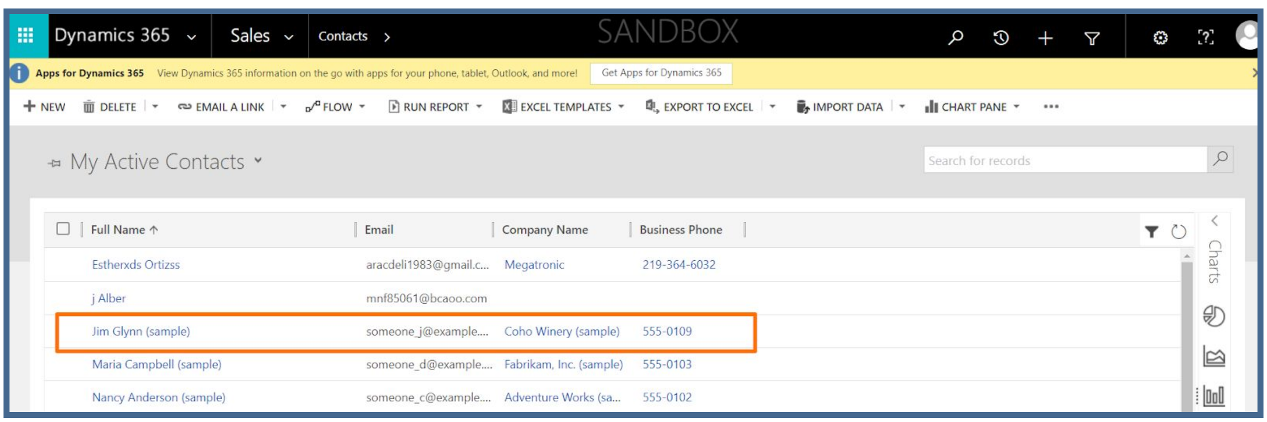


Click **Apply setup** when you're done.

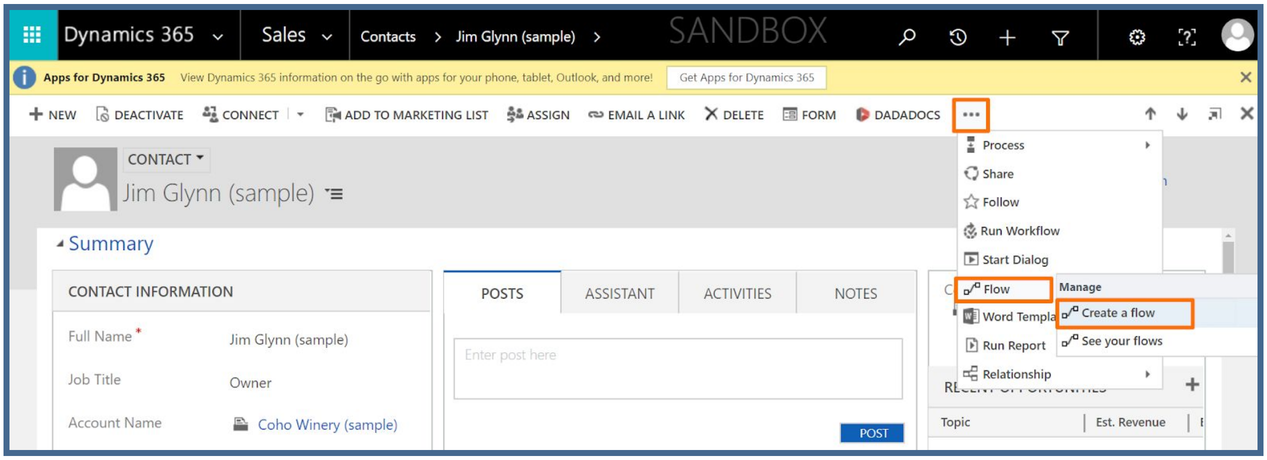
Stage 3: Create the MS flow with the airSlate Flow from Stage 1

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





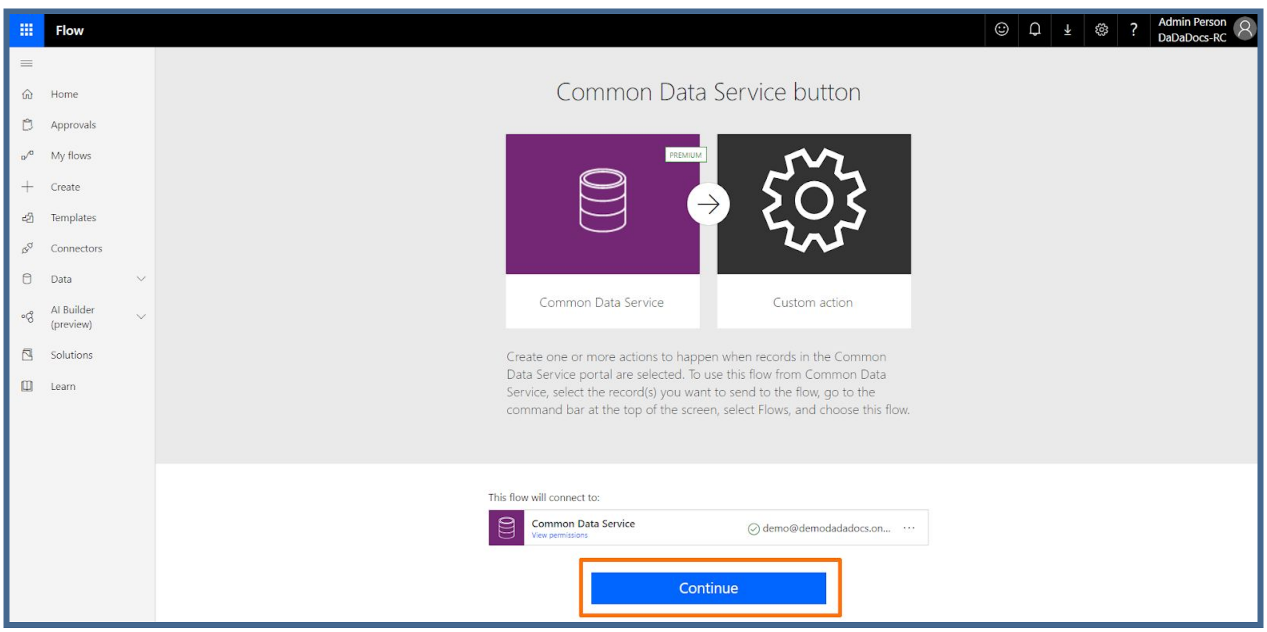
13. In the command bar select triage. Click Flow - Create Flow in the dropdown.



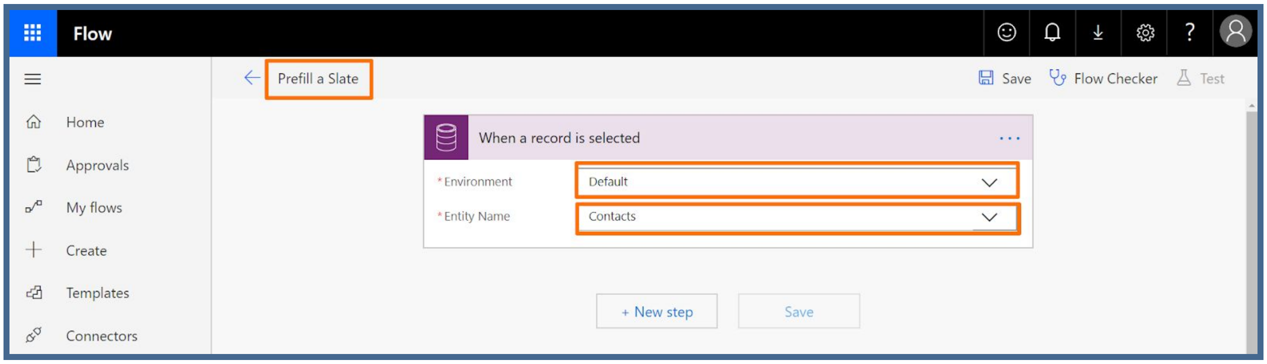
You'll be redirected to the MS Flow.

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

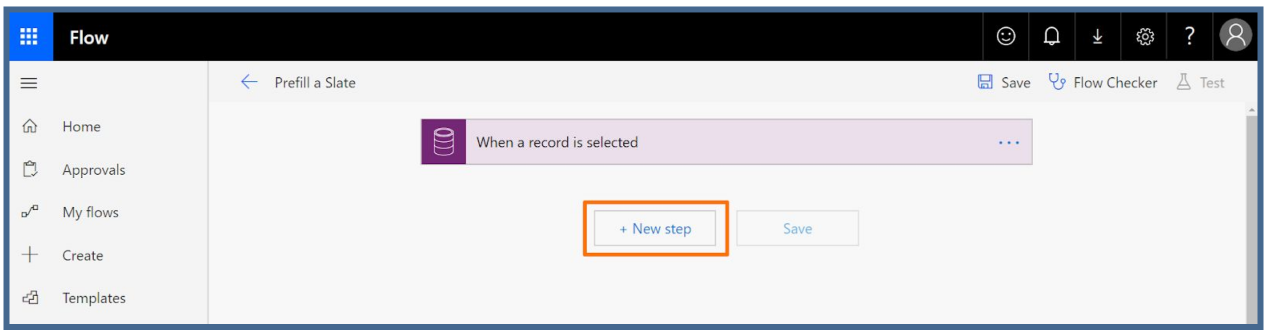
This authorizes the Common Data Service connector to create a button for the entities you've started from (Contacts in this case).

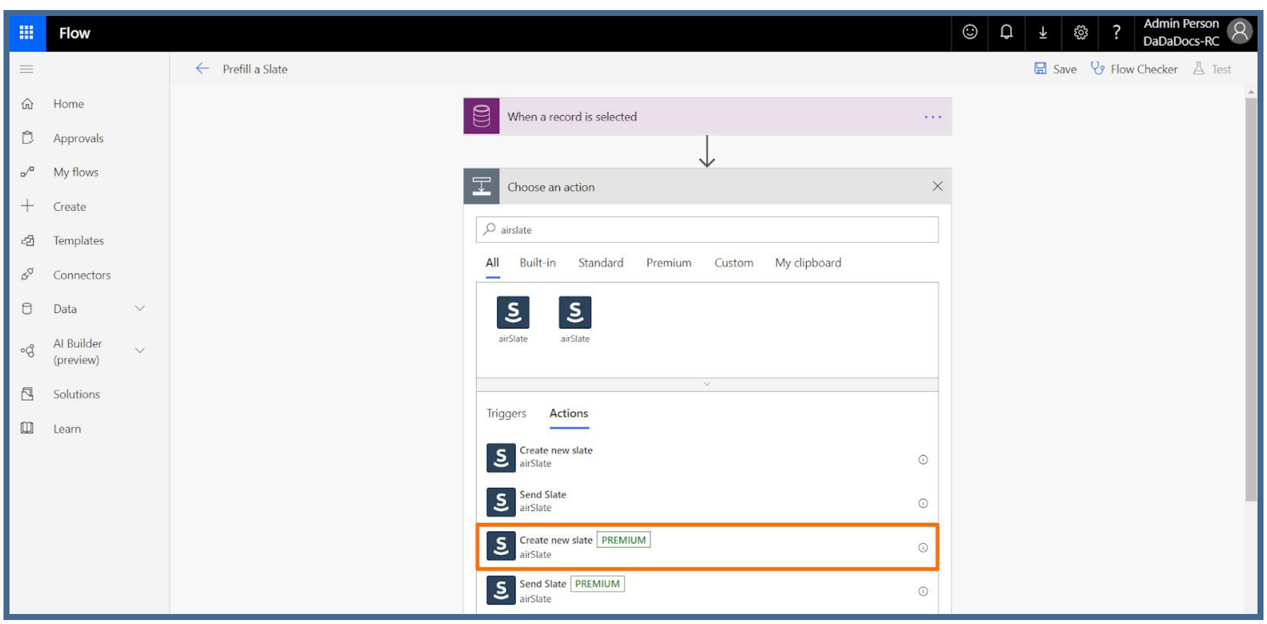


15. Select the environment and entity name, they should be available from the dropdown menus.
The environment is your organization in Dynamics 365, the entity name is the type of entities that should work with this flow.
Name the flow - this will also be a name of your button in Dynamics 365.

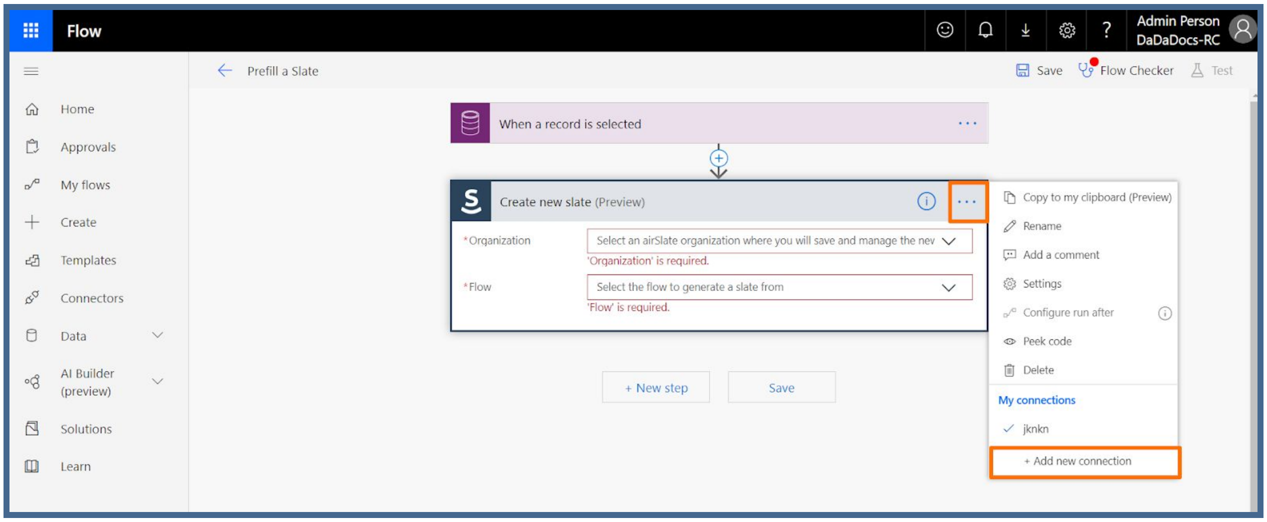


16. Add a New step. Select the airSlate connector, then click on the action Create a new slate.



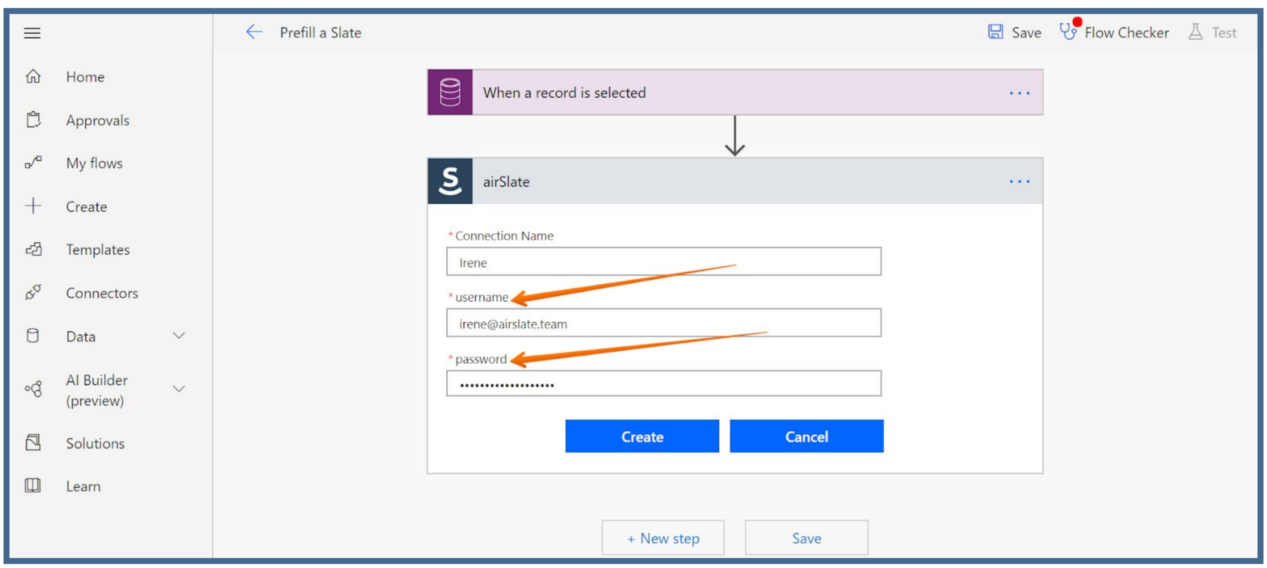


17. Click the triage, then Add new connection in the action menu.



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).

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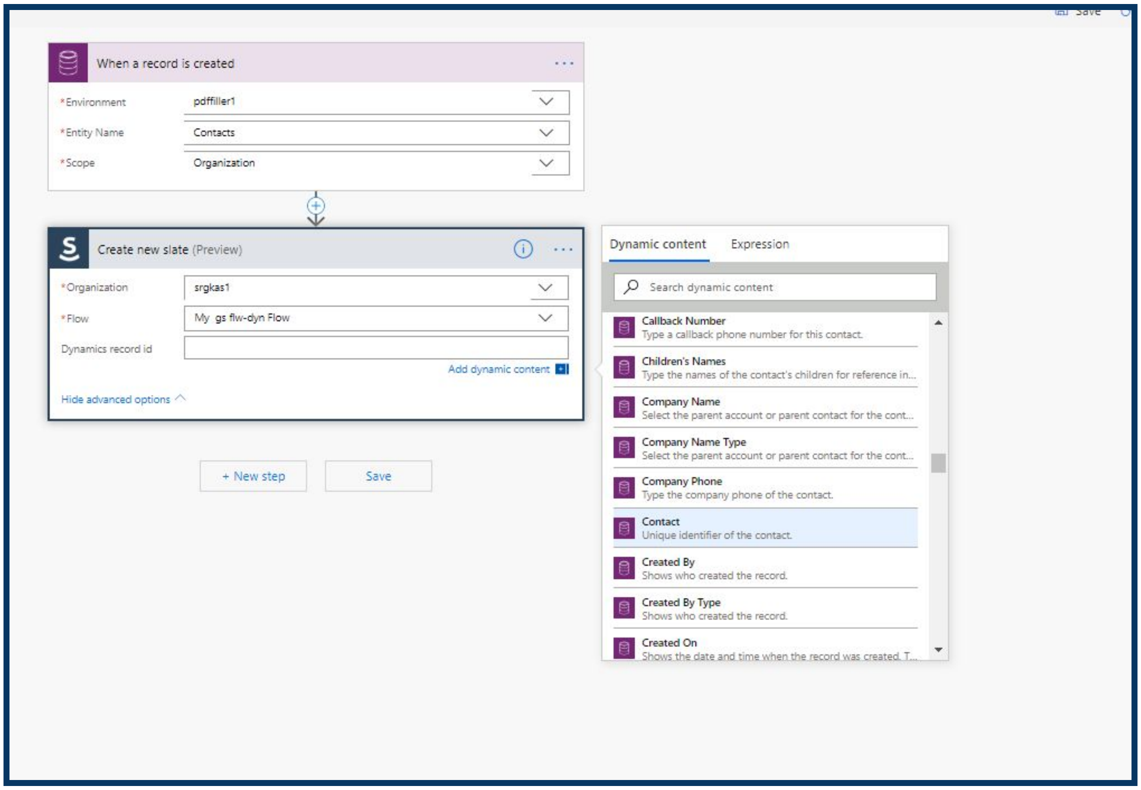
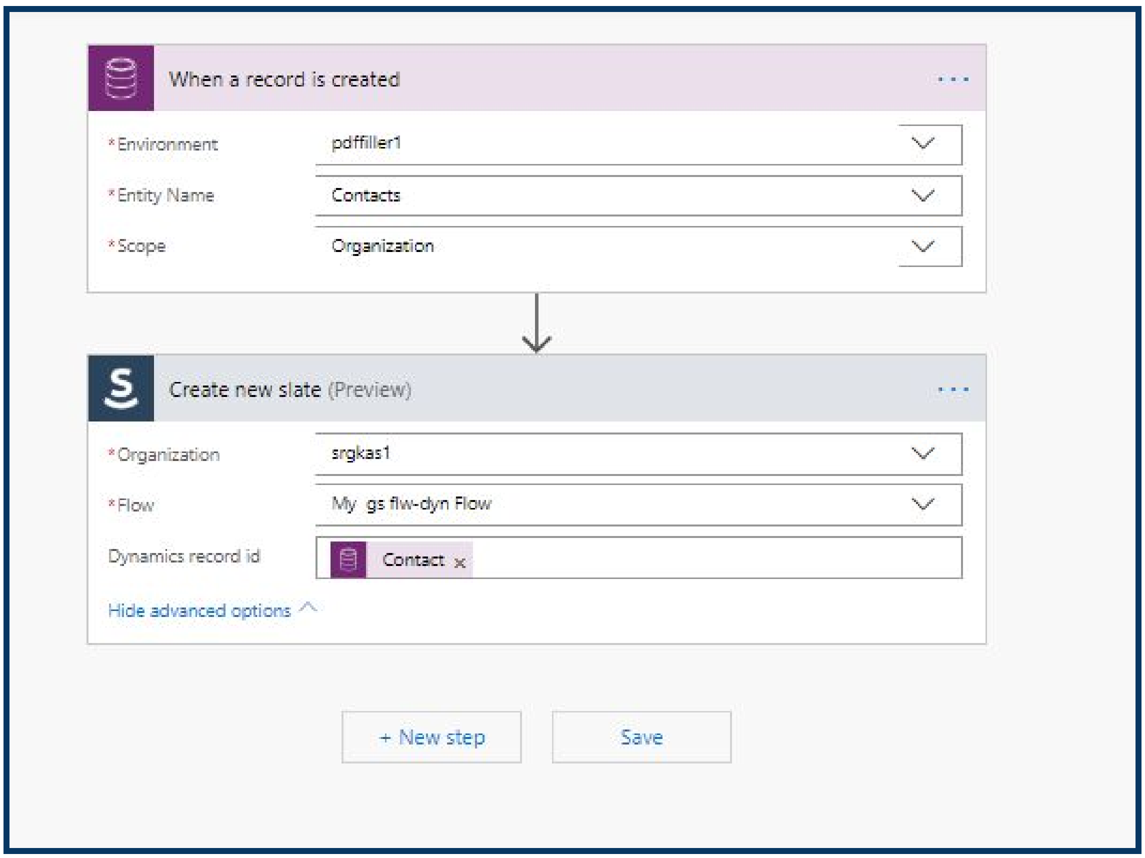
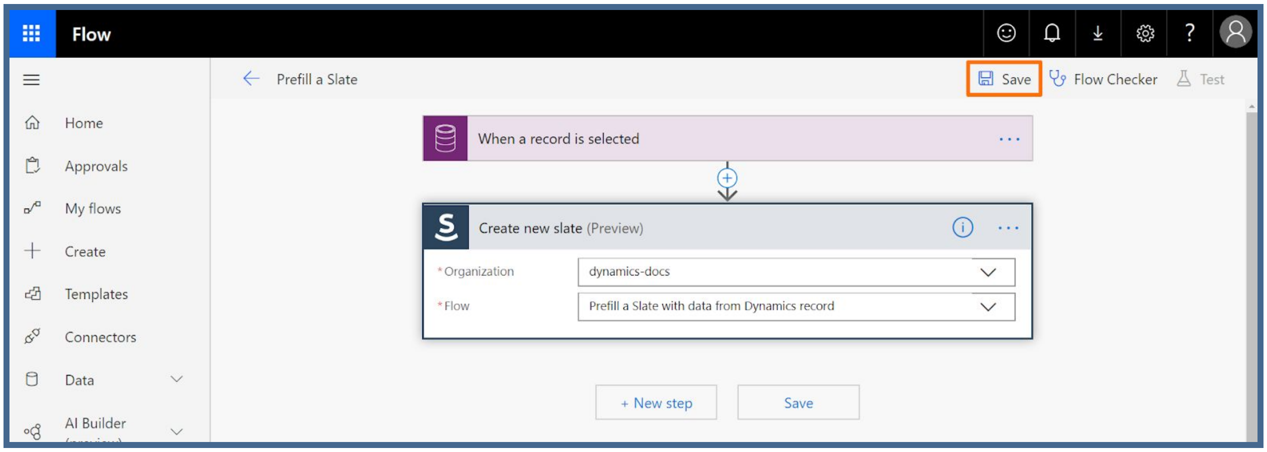
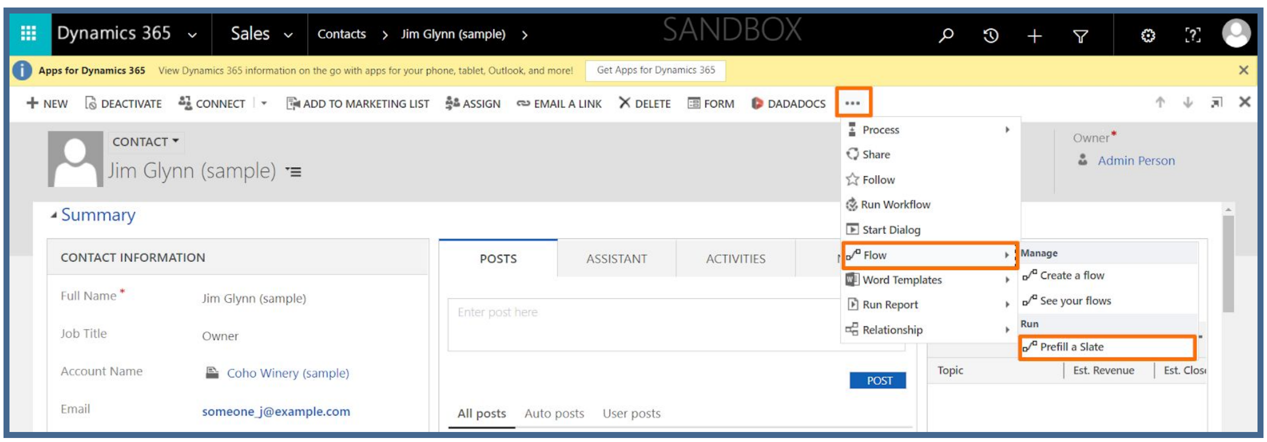

When a record is created
*Environment
pdffiller1
*Entity Name
Contacts
*Scope
Organization
Create new slate (Preview)
*Organization
srgkas1
*Flow
My gs flw-dyn Flow
Dynamics record id
Add dynamic content
Hide advanced options
+ New step
Save
Dynamic content
Expression
Search dynamic content
Callback Number
Type a callback phone number for this contact.
Children's Names
Company Name
Company Name Type
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


When a record is created
*Environment
pdffiller1
*Entity Name
Contacts
*Scope
Organization
Create new slate (Preview)
*Organization
srgkas1
*Flow
My gs flw-dyn Flow
Dynamics record id
Contact
Hide advanced options
+ New step
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.