

Signicat Sign for Microsoft Dynamics 365 CRM – QuickStart Guide

Overview

Overview

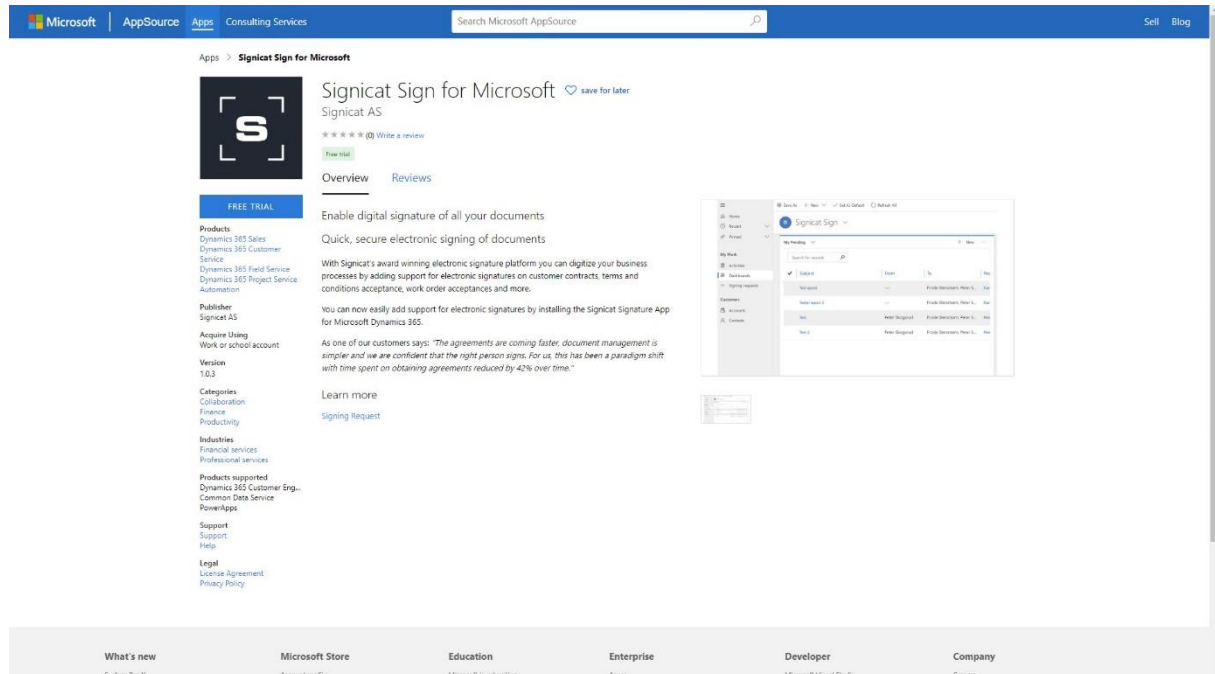
This guide will provide information concerning installation, sending documents, requesting signatures and detailed information on signature types for the app Signicat Sign for Microsoft. This guide is primarily aimed at CRM administrators as the installation calls for administrative rights to the target instance.

Installation

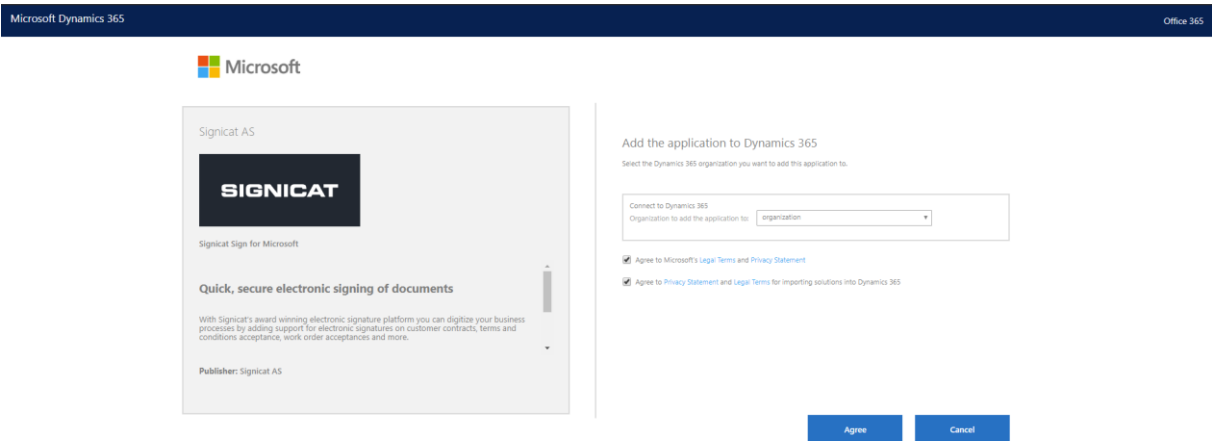
This section will deal with installation of the solution file as well as uninstalling the app should the occasion call for it. Before attempting to install the solution, make sure you are a Microsoft Dynamics 365 CRM administrator for the desired instance.

Note: If you are simply updating the app to a newer version, no data will be lost during the update. All signatures and signature history will be retained.

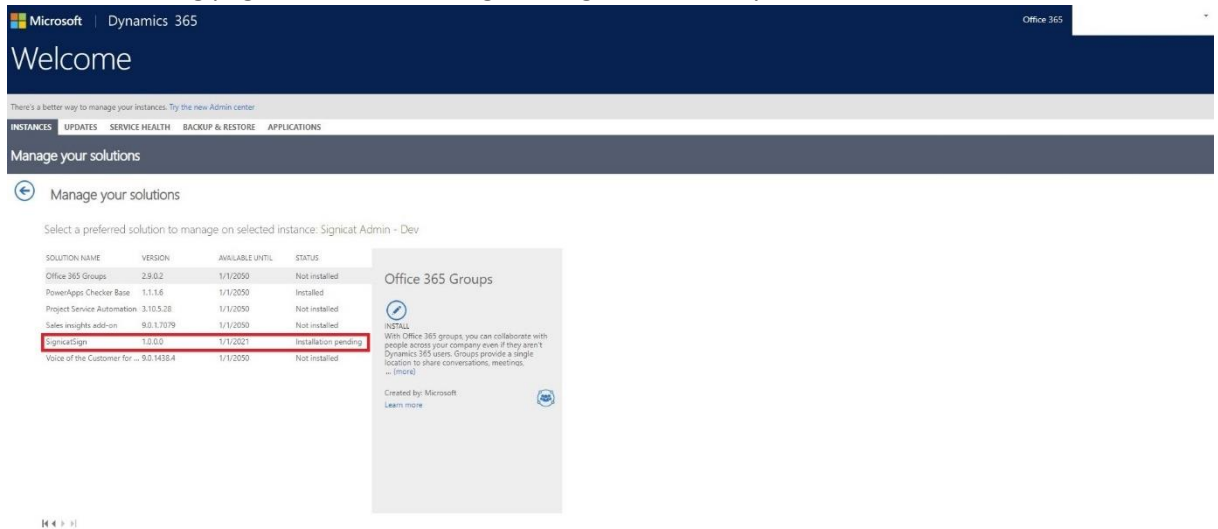
1. Follow this link to Microsoft AppSource



2. On the left side on the page click on **Free Trial**
3. Using your work account with Microsoft Dynamics 365 CRM administrative rights, sign in to the Microsoft AppSource.
4. Read and agree to the terms of use and privacy policy. Click **Continue**
5. Select the organisation to which you wish to install Signicat Sign for Microsoft

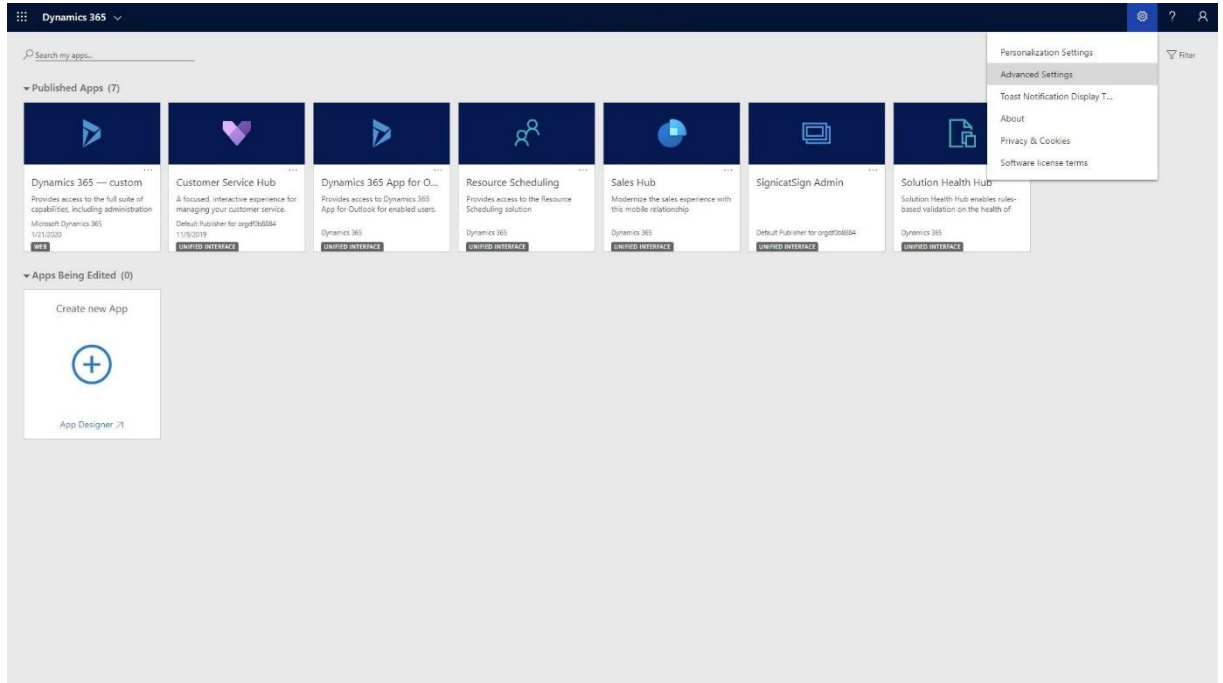


- Read and agree to Microsoft's legal terms and privacy statement. Check the two boxes. Click **Agree**.
- On the following page, scroll until the Signicat Sign is visible in your solution list.

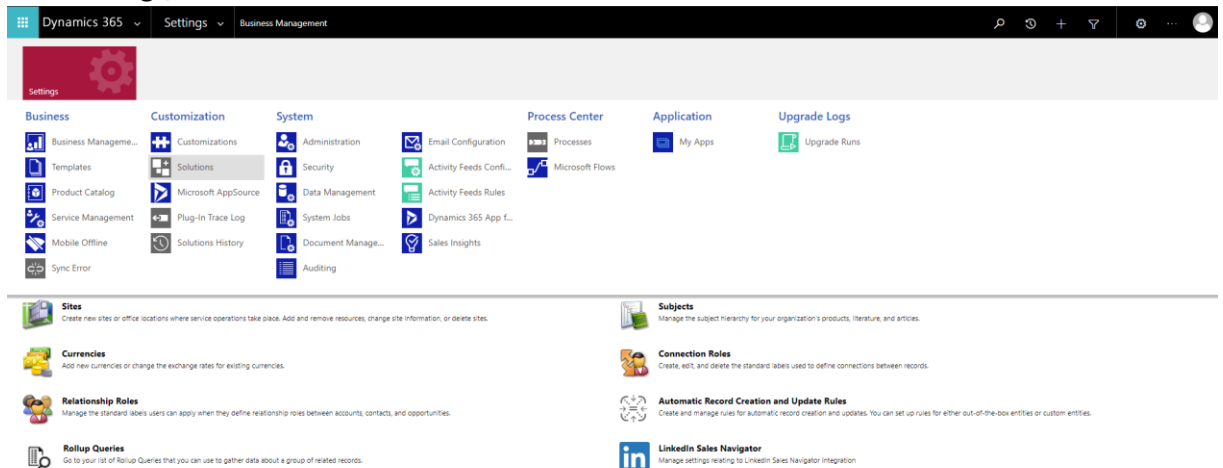


- If the solution is visible the installation is underway and should be visible on your solution list shortly. To navigate to the solution list, enter the selected Dynamics 365 environment and

click **Advanced Settings**.



9. Click **Settings**, and then **Solutions**



10. When the installation is complete, the app should appear in the list of installed solutions.

Dynamics 365 | **Solutions**

You need to assign security roles to new users. Click to see a list of Users who need Microsoft Dynamics 365 Security Roles. Assign Roles

All Solutions

New | Delete | Show Dependencies | Import | Export | Clone a Patch | Clone Solution | Apply Solution Upgrade | Import Translations | Export Translations | Publish All Customizations | Get Solutions from Marketplace | More Actions

Search for records

Name	Display Name	Version	Installed On	Package T.	Publisher	Description
SignicatSign	SignicatSign	1.0.0.0	1/21/2020	Managed	Signicat	
msdyn_ContextualHel...	Contextual Help Base	1.0.0.10	11/22/2019	Managed	Dynamics 365	
msdyn_ContextualHelp	Contextual Help	1.0.0.10	11/22/2019	Managed	Dynamics 365	
msdyn_PowerAppsCh...	PowerApps Checker B...	1.1.1.6	11/22/2019	Managed	Dynamics 365	PowerApps Checker promotes higher-quality mo...
msdyn_PowerAppsCh...	PowerApps Checker U...	1.1.1.6	11/22/2019	Managed	Dynamics 365	PowerApps Checker promotes higher-quality mo...
msdyn_PowerAppsCh...	PowerApps Checker	1.1.0.10	11/22/2019	Managed	Dynamics 365	PowerApps Checker promotes higher-quality mo...
msdynce_CoreService...	Core Service Scheduling	9.0.19102...	11/20/2019	Managed	Dynamics 365	Dynamics 365 workload for service scheduling.
MicrosoftDynamicsSc...	Universal Resource Sc...	3.10.0.239	11/20/2019	Managed	Dynamics 365	The Universal Resource Scheduling solution prov...
msdyn_playbook_app	Playbook App	9.0.1909.1...	11/20/2019	Managed	Dynamics 365	Playbooks is a capability that helps organization...
msdyn_SalesApp	Dynamics 365 Sales A...	9.0.1912.1...	11/20/2019	Managed	Dynamics 365	Automate sales processes and monitor performa...
msdynce_CustomerSe...	Customer Service Hub...	9.0.19111...	11/9/2019	Managed	Dynamics 365	A focused, interactive experience for managing y...
msdynce_CustomerSe...	Customer Service Hub...	9.0.19111...	11/9/2019	Managed	Dynamics 365	Patch for Dynamics 365 workload for service.
msdynce_CustomerSer...	Customer Service Hub	9.0.5.0056	11/9/2019	Managed	Dynamics 365	A focused, interactive experience for managing y...
Crs3882	Common Data Service...	1.0.0.0	11/9/2019	Unmanag...	CDS Default Publisher	

1 - 15 of 15 (0 selected) | All * A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page 1

Uninstallation

Should you need to uninstall the app, simply select it from the list and click **Delete**.

Dynamics 365 | **Settings** | **Solutions**

You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics 365 Security Roles. [Assign Roles](#)

All Solutions

[New](#) [Clone](#) [Show Dependencies](#) [Import](#) [Export](#) [Clone & Patch](#) [Clone Solution](#) [Apply Solution Upgrade](#) [Import Translations](#) [Export Translations](#) [Publish All Customizations](#) [Get Solutions from Marketplace](#) [More Actions](#)

Name	Display Name	Version	Installed On	Package T.	Publisher	Description
<input checked="" type="checkbox"/>	SignicatSign	SignicatSign	1.0.0.0	1/21/2020	Managed	Signicat
msdyn_ContextualHel...	Contextual Help Base	1.0.0.10	11/22/2019	Managed	Dynamics 365	
msdyn_ContextualHelp	Contextual Help	1.0.0.10	11/22/2019	Managed	Dynamics 365	
msdyn_PowerAppsCh...	PowerApps Checker B...	1.1.1.6	11/22/2019	Managed	Dynamics 365	PowerApps Checker promotes higher-quality mo...
msdyn_PowerAppsCh...	PowerApps Checker U...	1.1.1.6	11/22/2019	Managed	Dynamics 365	PowerApps Checker promotes higher-quality mo...
msdyn_PowerAppsCh...	PowerApps Checker	1.1.0.10	11/22/2019	Managed	Dynamics 365	PowerApps Checker promotes higher-quality mo...
msdynce_CoreService...	Core Service Scheduling	9.0.19102...	11/20/2019	Managed	Dynamics 365	Dynamics 365 workload for service scheduling.
MicrosoftDynamicsSc...	Universal Resource Sc...	3.10.0.239	11/20/2019	Managed	Dynamics 365	The Universal Resource Scheduling solution prov...
msdyn_playbook_app	Playbook App	9.0.1906.1...	11/20/2019	Managed	Dynamics 365	Playbooks is a capability that helps organization...
msdyn_SalesApp	Dynamics 365 Sales A...	9.0.1912.1...	11/20/2019	Managed	Dynamics 365	Automate sales processes and monitor performa...
msdynce_CustomerSe...	Customer Service Hub...	9.0.19111...	11/9/2019	Managed	Dynamics 365	A focused, interactive experience for managing y...
msdynce_CustomerSe...	Customer Service Hub...	9.0.19111...	11/9/2019	Managed	Dynamics 365	Patch for Dynamics 365 workload for service.
msdynce_CustomerSer...	Customer Service Hub	9.0.5.0056	11/9/2019	Managed	Dynamics 365	A focused, interactive experience for managing y...
Cra3582	Common Data Service...	1.0.0.0	11/9/2019	Unmanag...	CDS Default Publisher	

1 of 16 (1 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page 1

Note: Should you elect to uninstall the application, all related data will be removed as well. This includes signatures, documents and remaining signature requests.

Configure Signicat Sign for Microsoft Dynamics 365 CRM

This section concerns setting up the necessary connections in order for the application to function as intended.

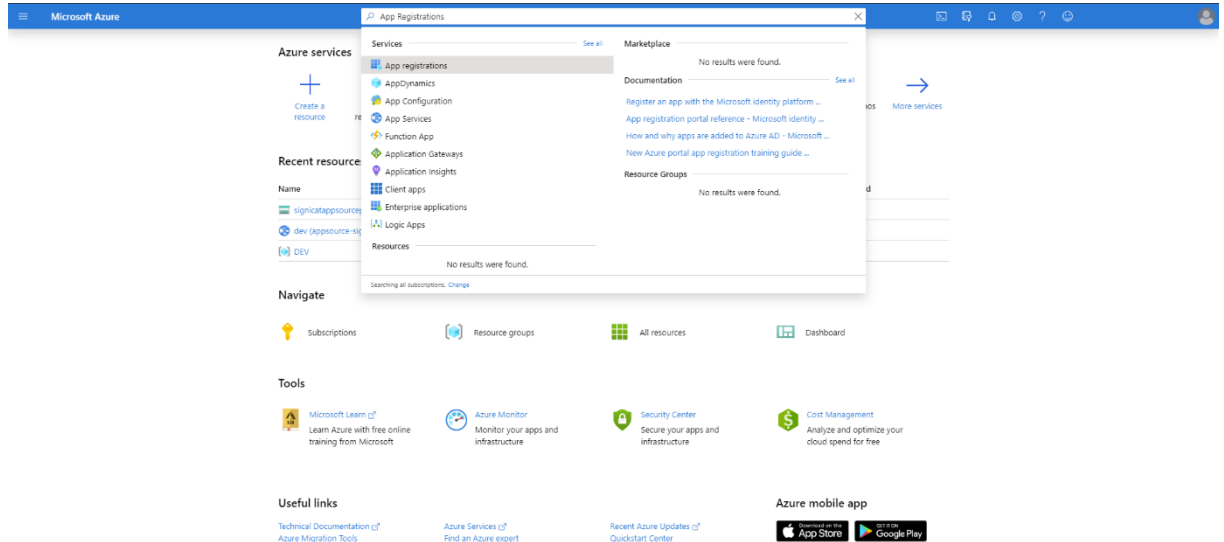
Note: Before proceeding with the app configuration, please ensure that you are logged in with an account with Office 365 global administrator privileges. This is required for the Signicat Sign app to access your Dynamics 365 CRM data.

1. Double-click the solution in the solution list. You will be prompted with a new window:

The screenshot shows the PowerApps interface for configuring the 'SignicatSign' solution. The left sidebar contains a tree view with categories like Information, Configuration, Components, and Entities. The main area is titled 'Send App User Info' and includes a 'Getting started' button. Below this, there are five input fields: 'Company Name' (placeholder: 'Your Company Name'), 'TenantId' (placeholder: 'TenantId'), 'Endpoint' (placeholder: 'Dynamics365 Url'), 'AppId' (placeholder: 'The Application ClientId'), and 'AppSecret' (placeholder: 'The Application Secret'). A blue 'Verify' button is located below the input fields. At the bottom, there are two horizontal bars (green and yellow) and a link to 'Contact Signicat support for help. Signicat support.' and another link to 'Register an app with Azure Active Directory.'

2. The following fields will need to be filled in in order to complete the application setup:
 - Company Name -
 - TenantID – Requires setup in Azure App Registration (see steps X-Z)
 - Endpoint – The URL for the current Dynamics 365 instance
 - AppID – Requires setup in Azure App Registration (see steps X-Z)
 - AppSecret – Requires setup in Azure App Registration (see steps X-Z)
3. TenantID, AppID, and AppSecret. Requires configuration in Azure App Services. Follow this link to the Azure Portal.

4. Search for and click **App registrations**



5. Click **New Registration**

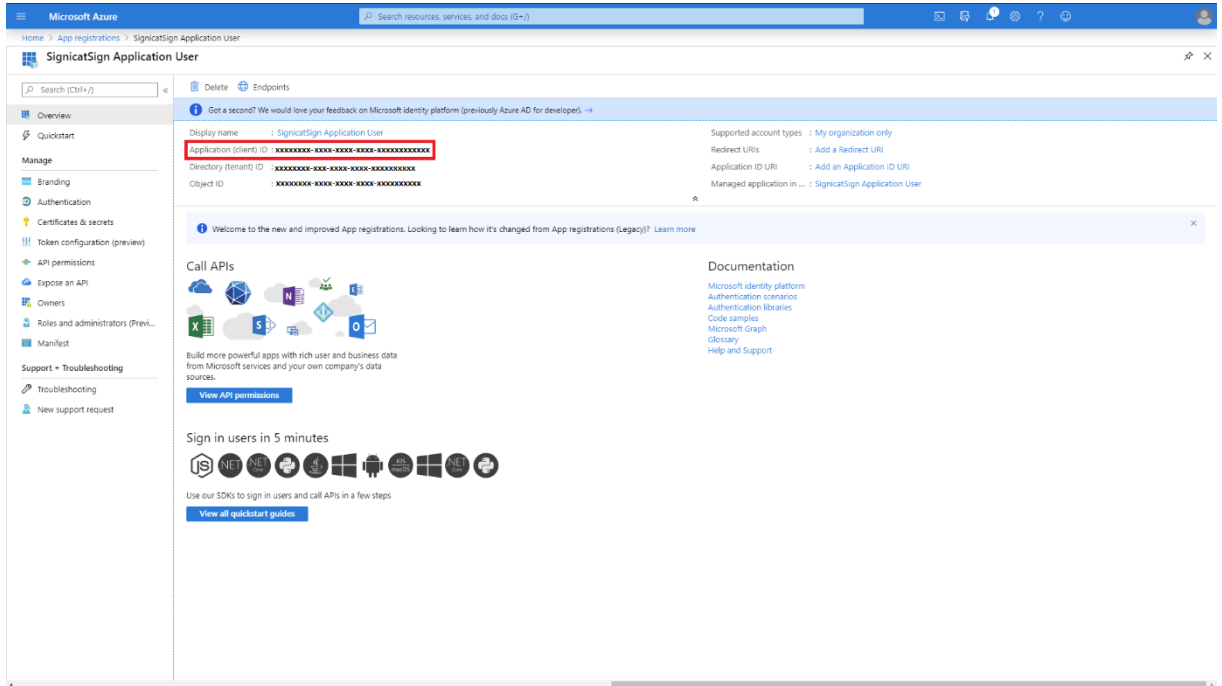
6. Fill in a name for the Application user i.e *Signicat Sign Application User*. Leave the rest of the form in the default state.

A screenshot of the 'Register an application' form in the Microsoft Azure portal. The form is titled 'Register an application' and has a search bar at the top. The form contains the following sections:

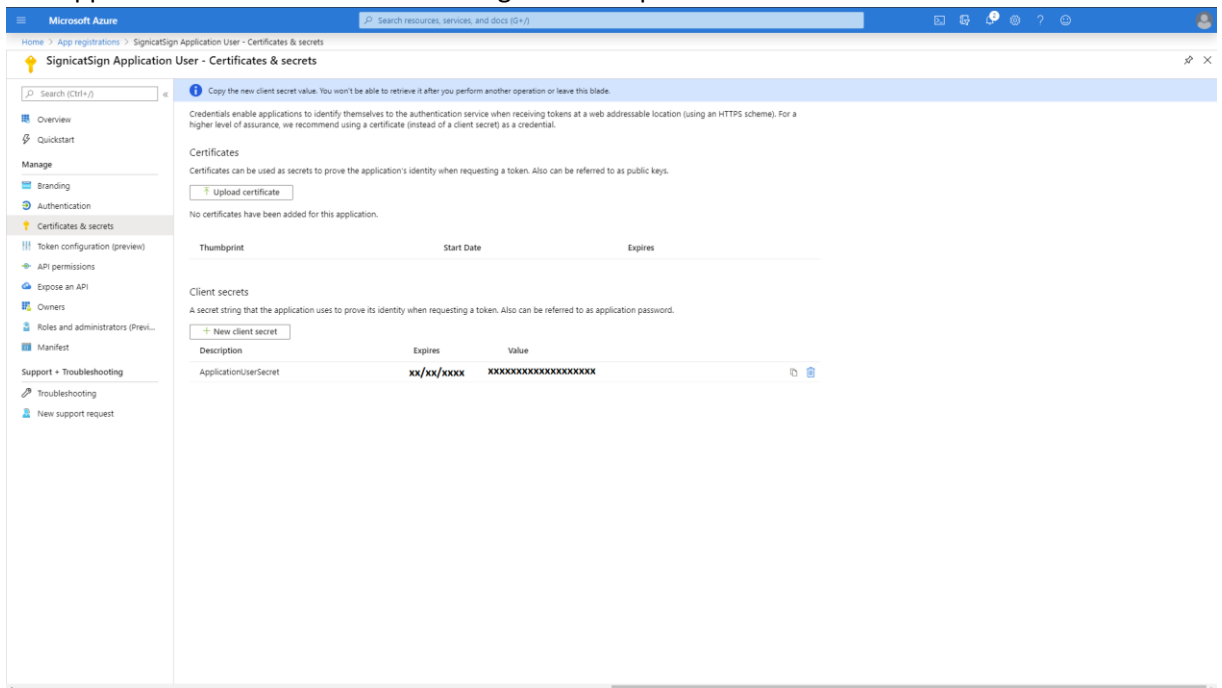
- Name**: A text input field with the value 'SignicatSign Application User' and a checkmark icon.
- Supported account types**: A section with the heading 'Who can use this application or access this API?'. It contains three radio button options:
 - ☒ Accounts in this organizational directory only (Signicat AS only - Single tenant)
 - ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)
 - ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- Redirect URI (optional)**: A section with the heading 'We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.' It contains a dropdown menu with the value 'Web' and a text input field with the value 'https://myapp.com/auth'.

At the bottom of the form, there is a blue 'Register' button.

7. When accessing the app registration, the **Application ID** is visible at the top of the page.

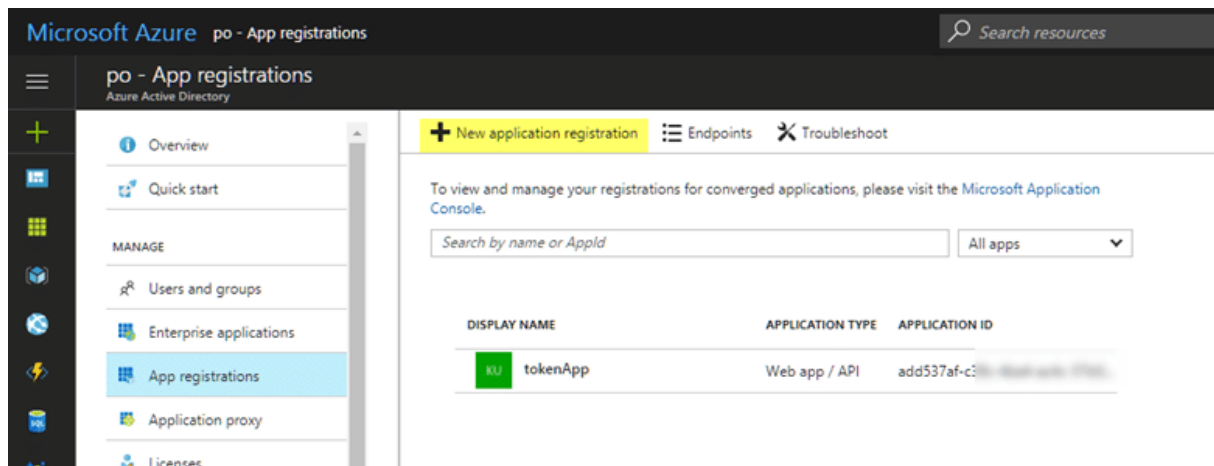


8. On the left side of the page click **Certificates & secrets**.
9. Click **+ New client secret**
10. Fill in an appropriate description i.e. *ApplicationUserSecret* and select an expiration date.
11. The Application Secret is now visible along with its expiration date.

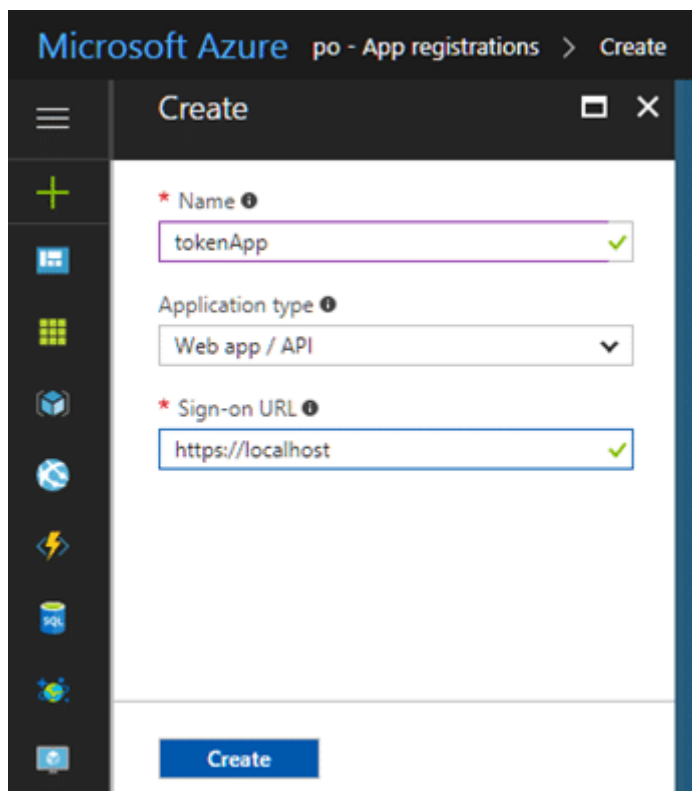


Creating Application User for Microsoft Dynamics

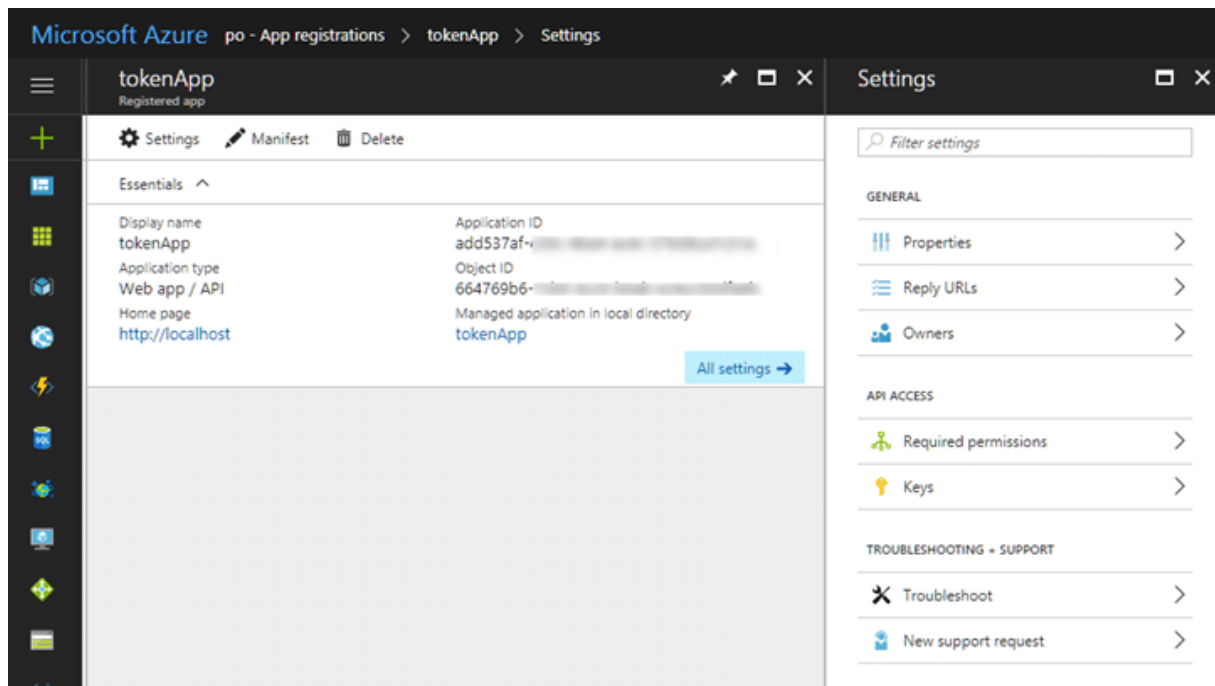
1. Navigate to **Azure Active Directory > App registrations > Click + New application registration**



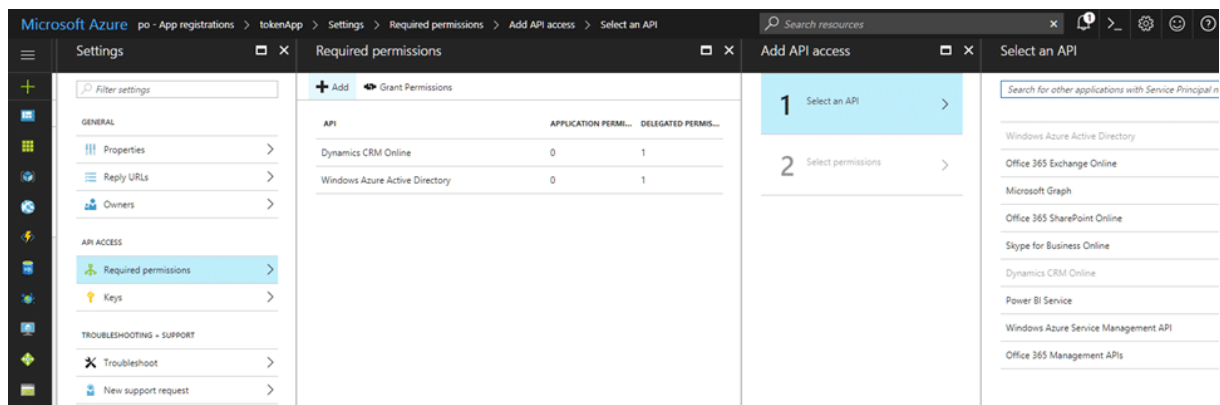
2. Now fill in the required fields as shown below and hit **Create**. Note that the sign-on URL only matters for something like a single page application – otherwise just putting a localhost URL is just fine.



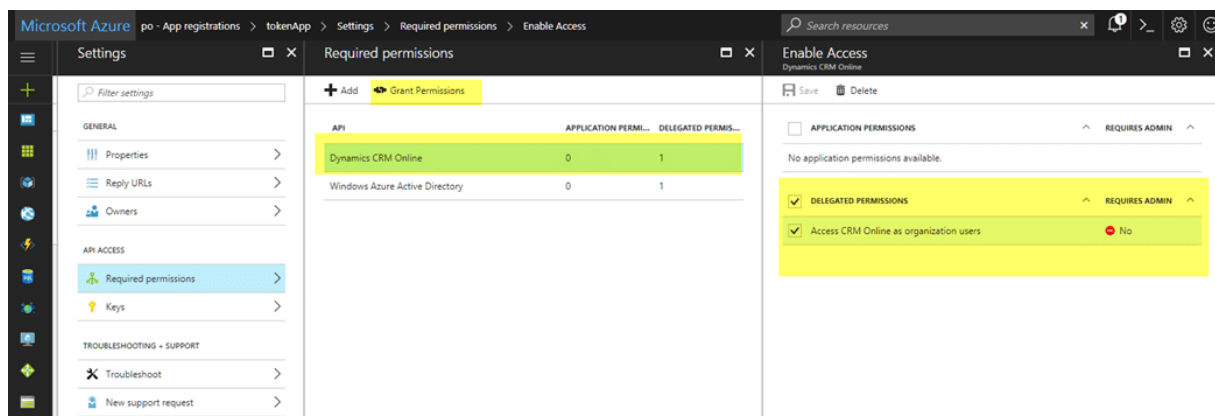
3. You have now successfully created an Azure app. Double click the app and you will see its details as below.



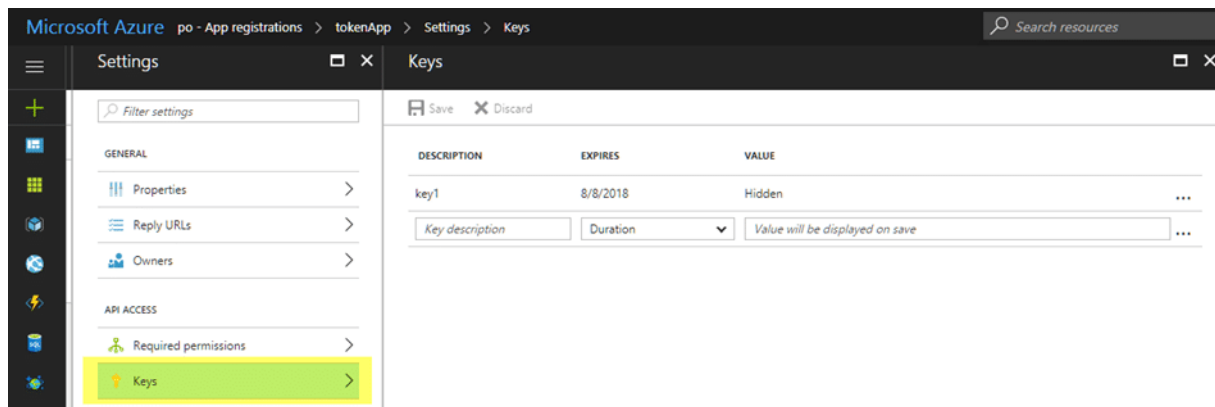
4. The app requires permission to access Dynamics 365. Navigate to **Required permissions** and click **+Add**. Then select **Dynamics 365 Online API**.



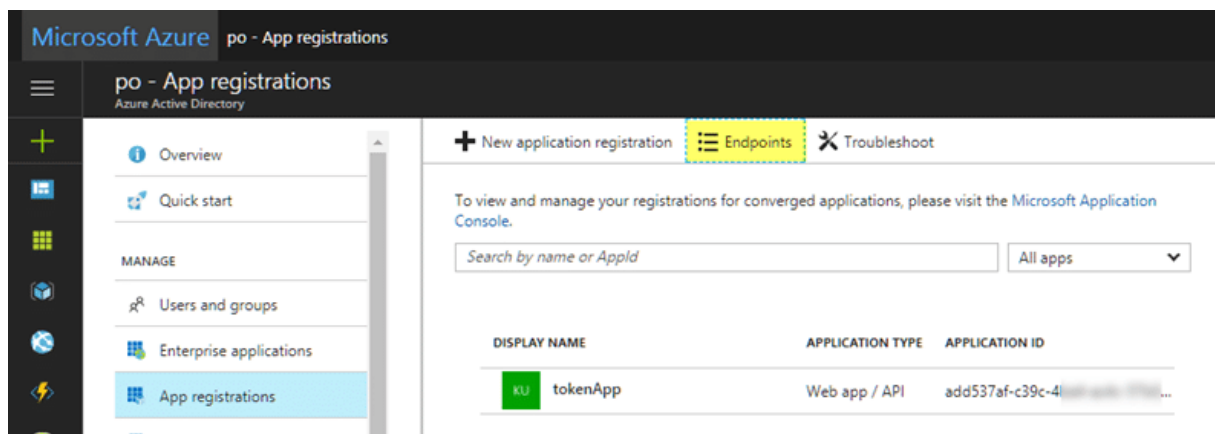
5. Make sure to check the Delegated Permissions checkboxes as shown below. Click **Grant Permissions** for the changes to take effect.



6. Navigate to **Keys**, create a new key, and copy the value to a document of some sort and, be sure to save it somewhere as the key will not be visible in the future.



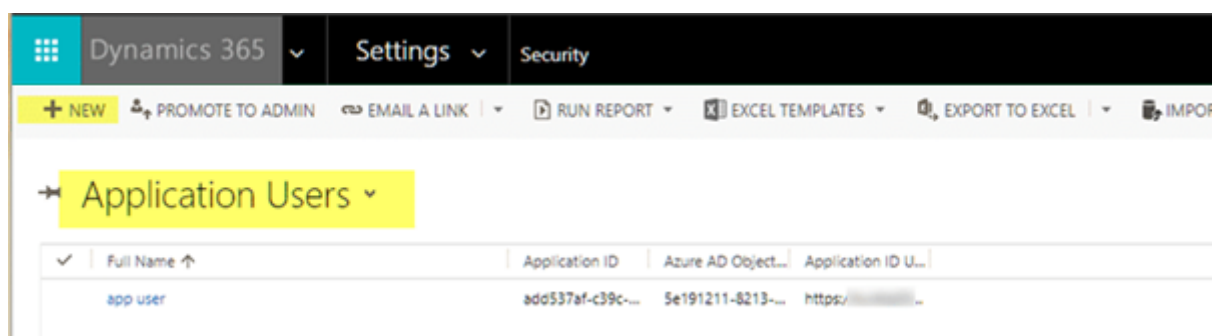
7. Navigate to **Endpoints** in the App registrations list view and copy the OAUTH 2.0 AUTHORIZATION ENDPOINT URL that you will need in the code later.



Setting Up the Application user in Dynamics

Now that the Azure app setup is complete, we'll move on to creating an application user.

1. Once you create the app user, make sure to give it a custom Security role that has the access you want this user to have.
2. Navigate to your Dynamics 365 org > **Settings** > **Security**. Change the view to **Application Users** and then click **+New**.



3. This will show you a new user form (make sure to change the form to “APPLICATION USER”) where you will only need to fill the “Application ID” field. Use the application ID you created from your Azure app in the previous steps.

The screenshot shows the Microsoft Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Security app user'. Below this is a toolbar with icons for 'CONNECT', 'PROCESS', 'APPROVE EMAIL', 'REJECT EMAIL', 'REASSIGN RECORDS', and 'MANAGE ROLES'. The user profile section shows 'USER : APPLICATION USER' and 'app user'. A yellow warning banner states: 'The information provided in this form is viewable by the entire organization.' The 'Summary' section is expanded, showing 'Account Information' and 'User Information'.

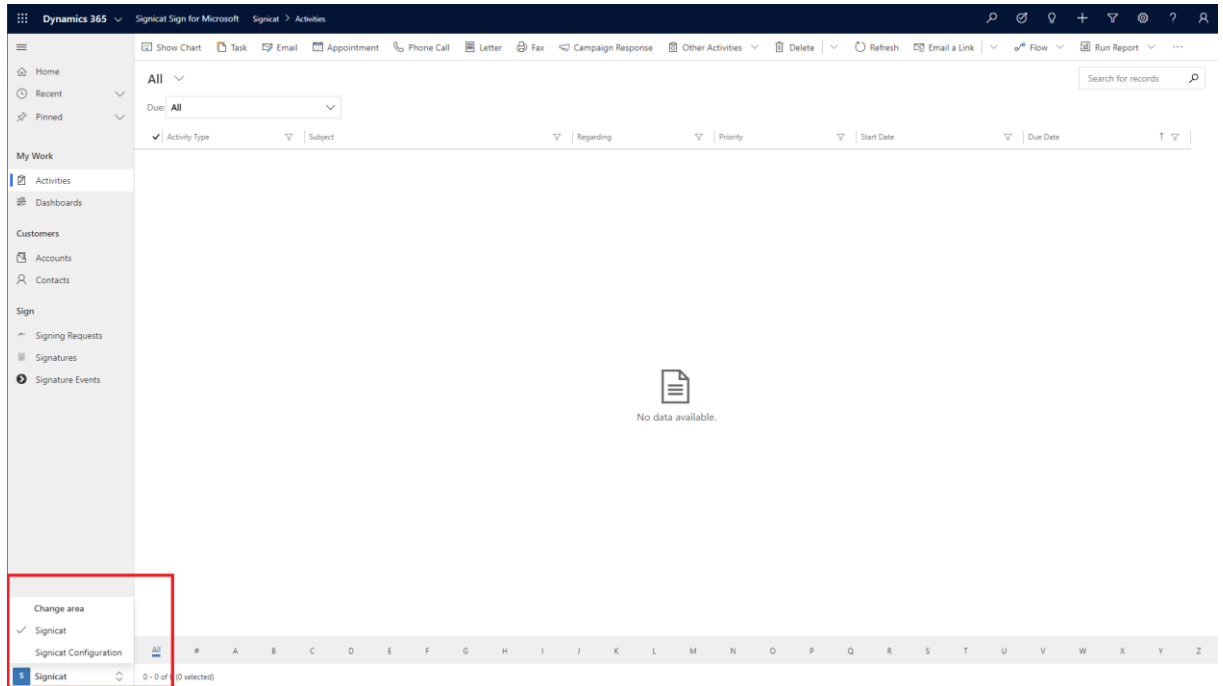
Account Information	
User Name *	com
Application ID *	add537af-c39c-4be4-
Application ID URI	https://onmicrosoft.com/10856c8-
Azure AD Object ID *	5e19-649-0334a8ea676f

User Information	
Full Name *	app user
Primary Email *	a.com

Signicat Settings

The final step in setting up the app is inputting some settings in your Microsoft Dynamics 365 instance.

1. Navigate to **Signicat information** on the bottom left side of your screen. The click **Signicat settings**.



2. You should see three records, *CaptureAppUserEndpoint*, *SignFunctionsEndpoint*, and *VerifyAppUserEndpoint*. Fill in the following information for each of the records:

CaptureAppUserEndpoint	https://microsoft-api-dev.signicat.com/sign-clients-dev/v1.0.0/UpsertD365AppUser
SignFunctionsEndpoint	https://microsoft-api-dev.signicat.com/dev/v1.0.0/signorder
VerifyAppUserEndpoint	https://microsoft-api-dev.signicat.com/sign-clients-dev/v1.0.0/VerifyD365AppUser