

DOCAPOSTE SERVICE

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Before any operation performing make sure, that you have an account at DocaPoste. For creating an account send a request to: <https://www.docaposte.com/politiques-contralia>

INSTALLATION

1. Open Solution CRM page:
(yourcrm.crm4.dynamics.com/tools/systemcustomization/systemCustomization.aspx?pid=11&web=true).
2. Click on Import.
3. Choose solution .zip file.
4. Click "Next" twice.
5. Close Import wizard page and Publish all customization.

After that, you'll have an access to DocaPoste application with accompanying functionality.

SETTINGS AND ACCOUNT

For account setting perform following steps:

1. Click on "Configurations" entity.
2. Create new record with following mapping:

The image shows two side-by-side screenshots. The left screenshot is from the Dynamics 365 'Configurations' entity, showing a 'New Configuration' form with fields: Nom (Test), URL (https://test.contralia.fr/Contralia), Login (test), Password (K0UB75E), Default Custom Ref (Any id), and Propriétaire. The right screenshot is from the Contralia 'User' management page, showing a form with fields: Name (Test), Login (test), and E-mail. Red arrows indicate the mapping: 'Nom' to 'Name', 'URL' to the browser address bar, 'Login' to 'Login', and 'Password' to 'E-mail'.

Nom – Name of record.

URL – URL of your Contralia account.

Login – Login of your Contralia account

Password – Password of your Contralia account (will be encrypted after saving).

Default Custom Ref – The caller is free to define the contents of this parameter, which can be used to associate the transaction with any domain-specific ID required by the client (e.g. customer reference number).

3. Further in “Offers” sub-grid click on “New Offre” and fill all required fields:

The screenshot shows the Dynamics 365 DocaPoste interface. On the left, the 'New Offre' form is open with the following fields: Nom (Offre de test), Configuration (Test), Code (-TEST), Code de l'unité associée (-TEST-DISTRIB), and Propriétaire. On the right, the Contralia API access tab is open, showing 'Organisation details "[Test]"' with a table of offers. Red arrows indicate the mapping of data from the Contralia table to the Dynamics 365 form fields.

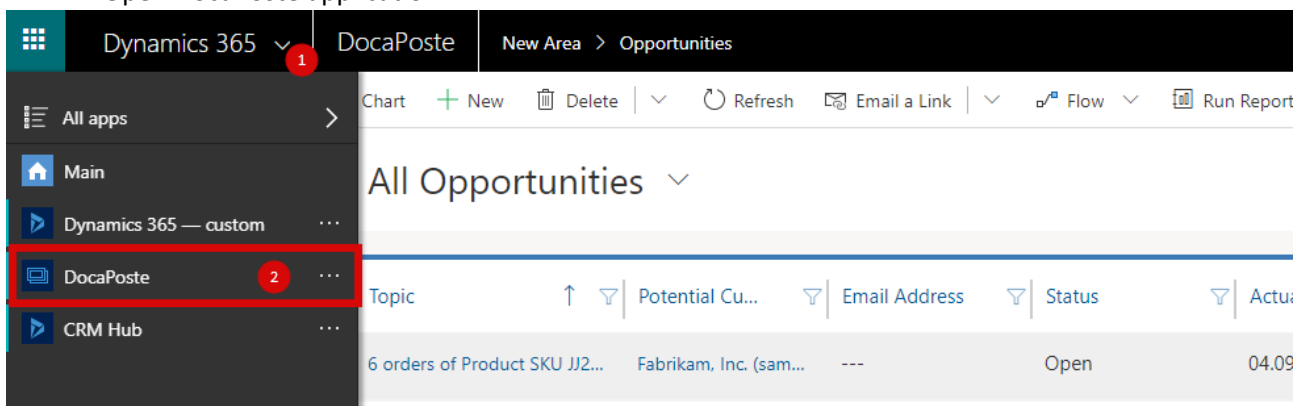
You can take all credentials from Offers section from API access tab of your Contralia account.

4. After record saving you can use signing documents functionality.

PROCESS

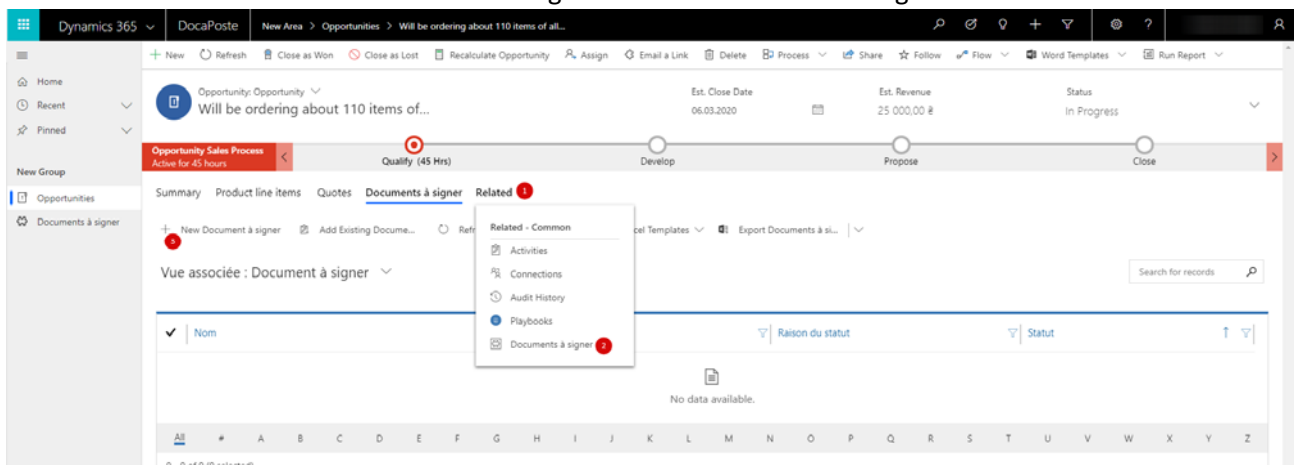
For guarantying access to documents sign functionality user should have Sign Document role.

1. Open DocaPoste application.



2. Open “Opportunity” record.

3. Click on “Related” -> “Documents à signer” -> “New Document à signer”



4. Choose correct Contact if it differ from Contact from Opportunity -> Save a record. Record will get a “Nouveau” status.

The screenshot shows the Dynamics 365 DocaPoste interface. The left sidebar contains navigation options: Home, Recent, Pinned, New Group, Opportunities, and Documents à signer. The main area displays the 'DOCUMENT À SIGNER' form for 'New Document à signer'. The 'Général' tab is active. The 'Contact' field is populated with 'Jim Glynn-Jackson' and the 'Propriétaire' field is empty. A red circle with the number 2 is next to the 'Save' button.

5. Click Enter a note under Timeline and add .pdf document to sign into Notes.

The screenshot shows the Dynamics 365 DocaPoste interface. The left sidebar contains navigation options: Home, Recent, Pinned, New Group, Opportunities, and Documents à signer. The main area displays the 'DOCUMENT À SIGNER' form for 'Jim Glynn (sample)'. The 'Général' tab is active. The 'Contact' field is populated with 'Jim Glynn-Jackson' and the 'Propriétaire' field is empty. The 'Timeline' section is visible, and a red circle with the number 1 is next to the 'Add note' button.

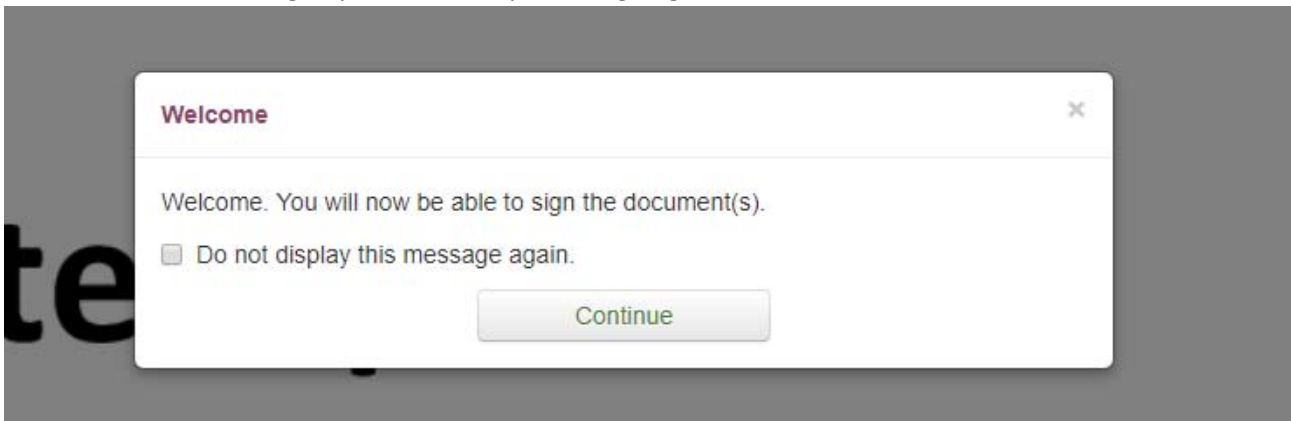
6. Click on “Send to Sign”. Make sure that Contact full name doesn’t consist special characters and has a valid email. Record will get an “En cours de signature” status.

SIGNING A DOCUMENT

1. After maintaining action in previous point, Contact will receive an email with .pdf file inside with link to sign it.



2. Contact should go by link and complete a signing.



3. Click "Sign" -> "Continue"



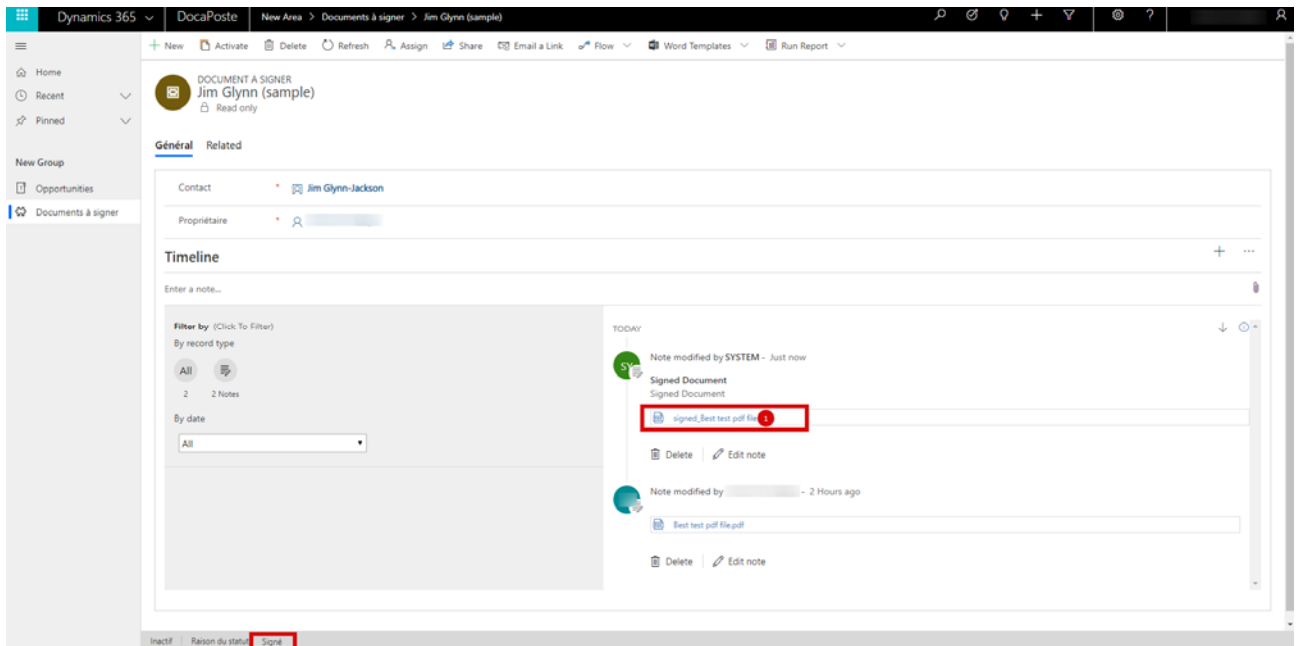
4. Enter your email address and click "Get my signature code". You will get an email with OTP code. Time for entering code is limited.



5. Document will change status to "Signed".

CHECKING DOCUMENT SIGNING STATUS

For checking status of the record, you should open the appropriate record. After opening, you will find signed .pdf document at notes.



Record will get a “Signé” status. Download if needed.

TECHNICAL DETAILS

All technical documentation you can find by the link: <https://test.contralia.fr/Contralia/doc/apiV2>