DOCAPOSTE SERVICE

MASAO

Microsoft Dynamics 365

CONTENT

MASAO

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:

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:
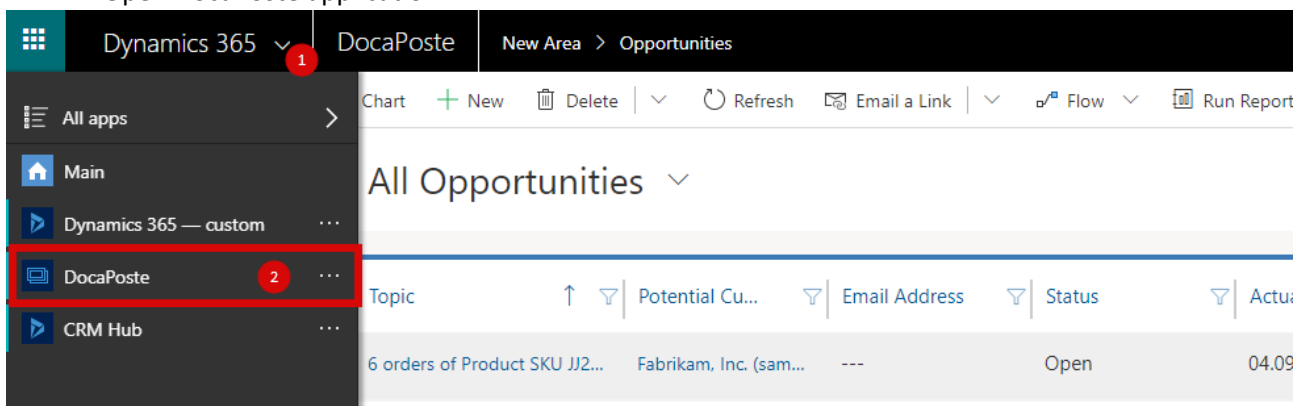

You can take all credentials from Offers section from API access tab of your Contralia account.

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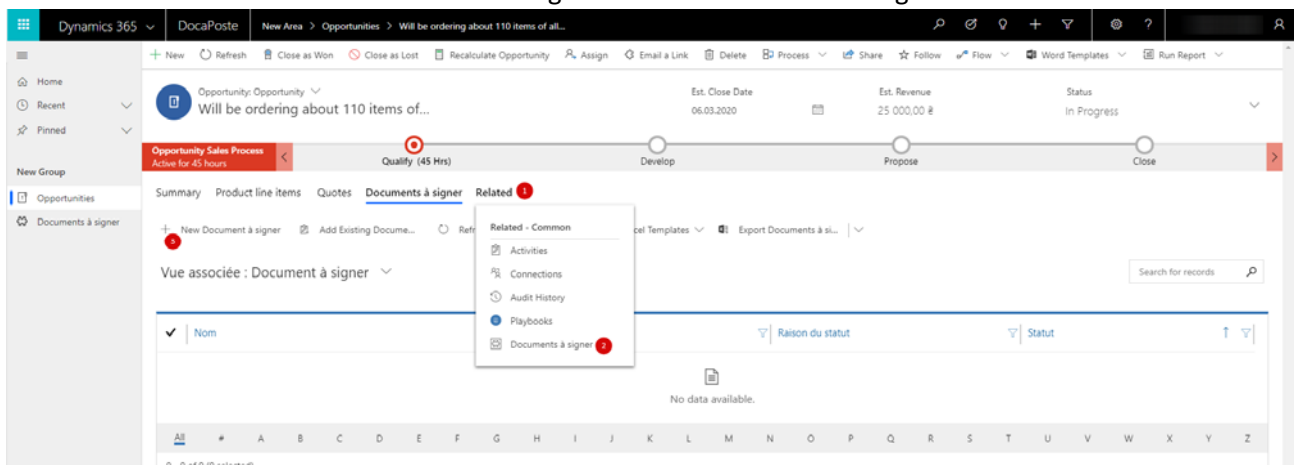
PROCCESS

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.

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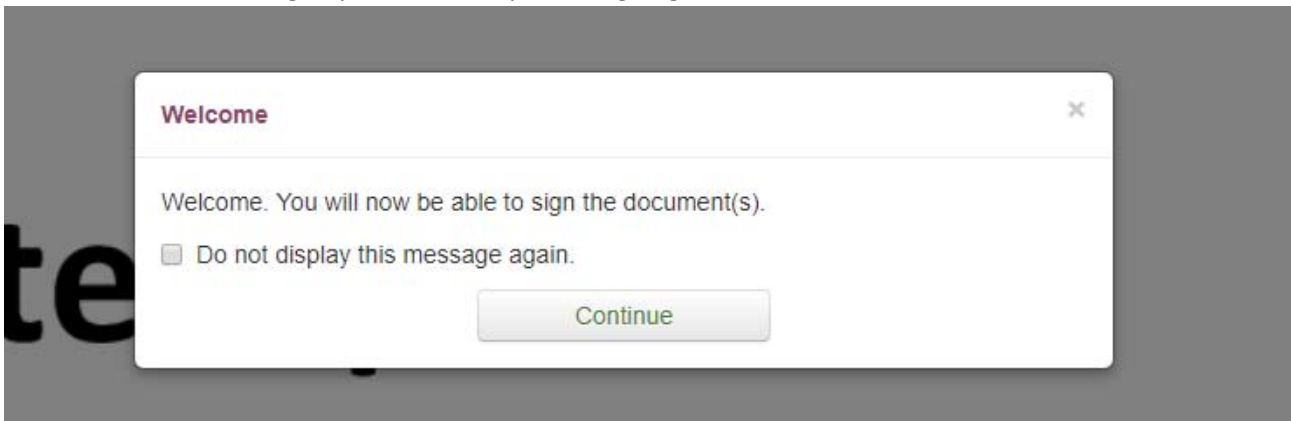

6. Click on "Send to Sign". Make sure that Contact full name doesn't consist special characters and has a valid email. Record will get an "En cours de signature" status.

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.
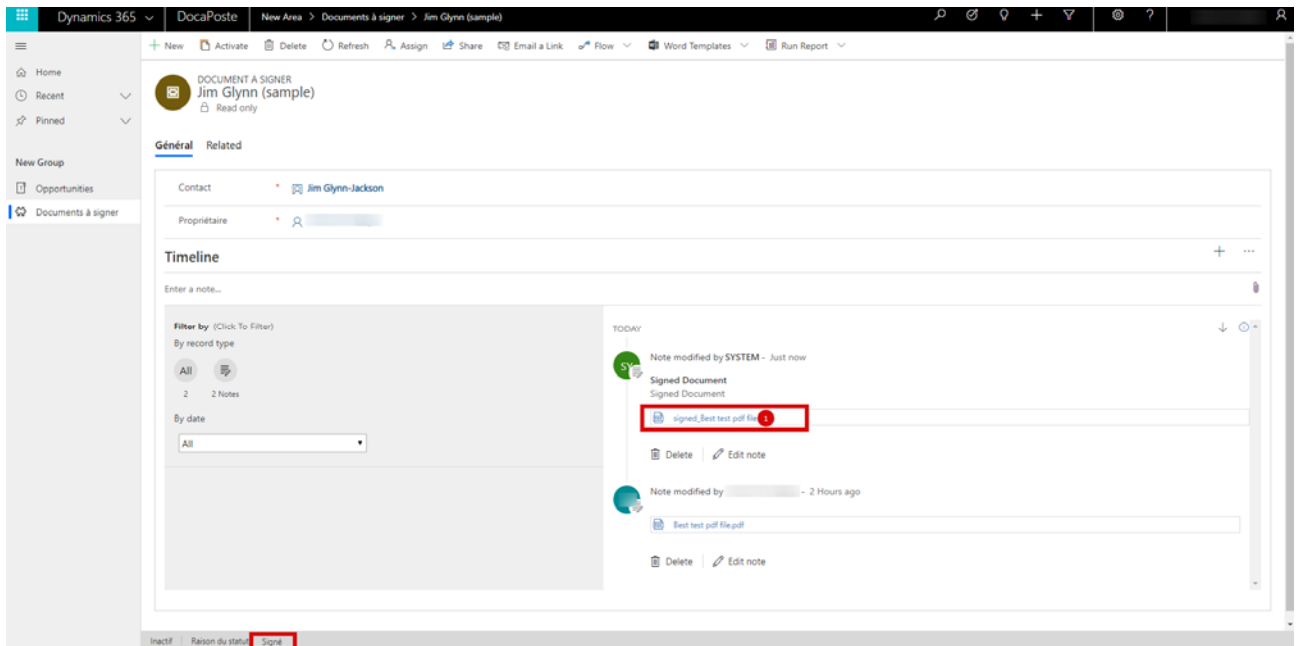

3. Click "Sign" -> "Continue"

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