

SignNow for Dynamics 365 User Guide

This guide takes you through the installation and configuration process for using the SignNow application with your Dynamics 365 organization.

Requirements:

*A Dynamics 365 account and working knowledge of Dynamics 365.
A SignNow account.*

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Send Documents with SignNow

Easily send out a document for e-signing with the SignNow Button. Follow the step-by-step instructions below to create an e-signature request and send it to your recipients in seconds.

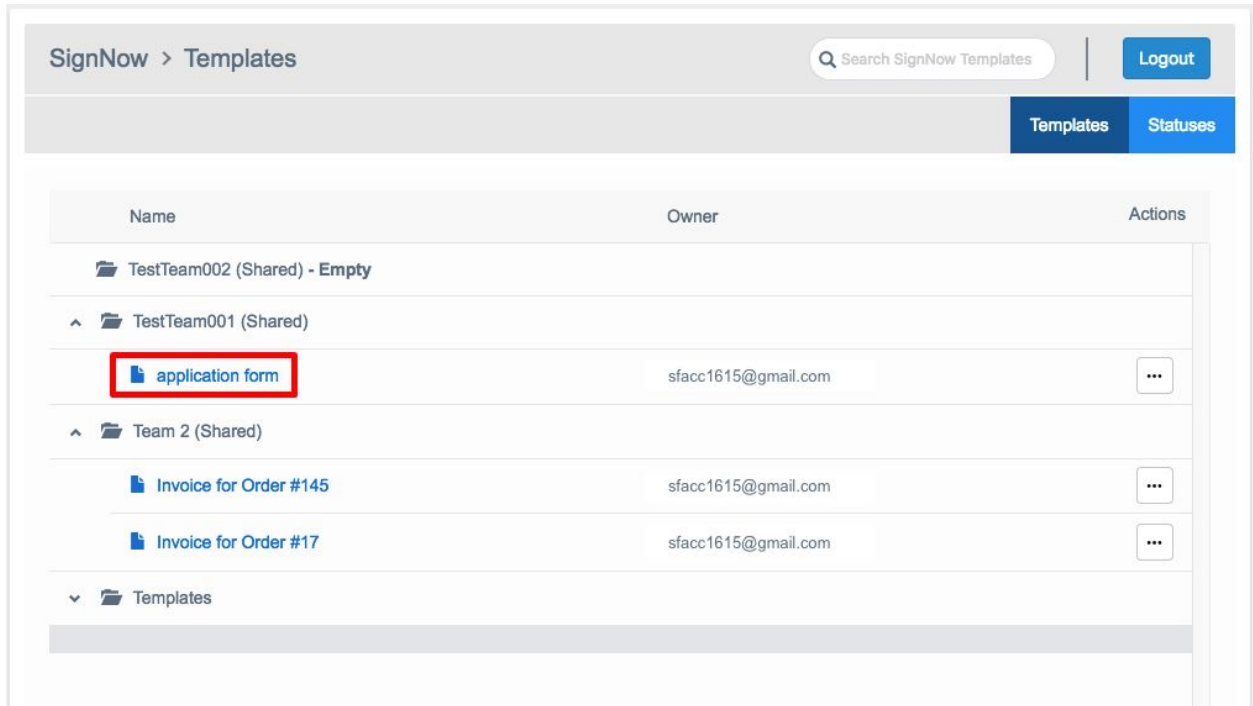
1. Go to the desired object, then choose the object record for creating an e-signature request from. When finished, click the *SignNow* button.

2. If you are not logged in to SignNow, you will be able to log in with your existing credentials. If you don't have a SignNow account, complete the simple registration process on <https://www.signnow.com/> and then log in with your credentials. Next, log in to your Dynamics 365 organization.

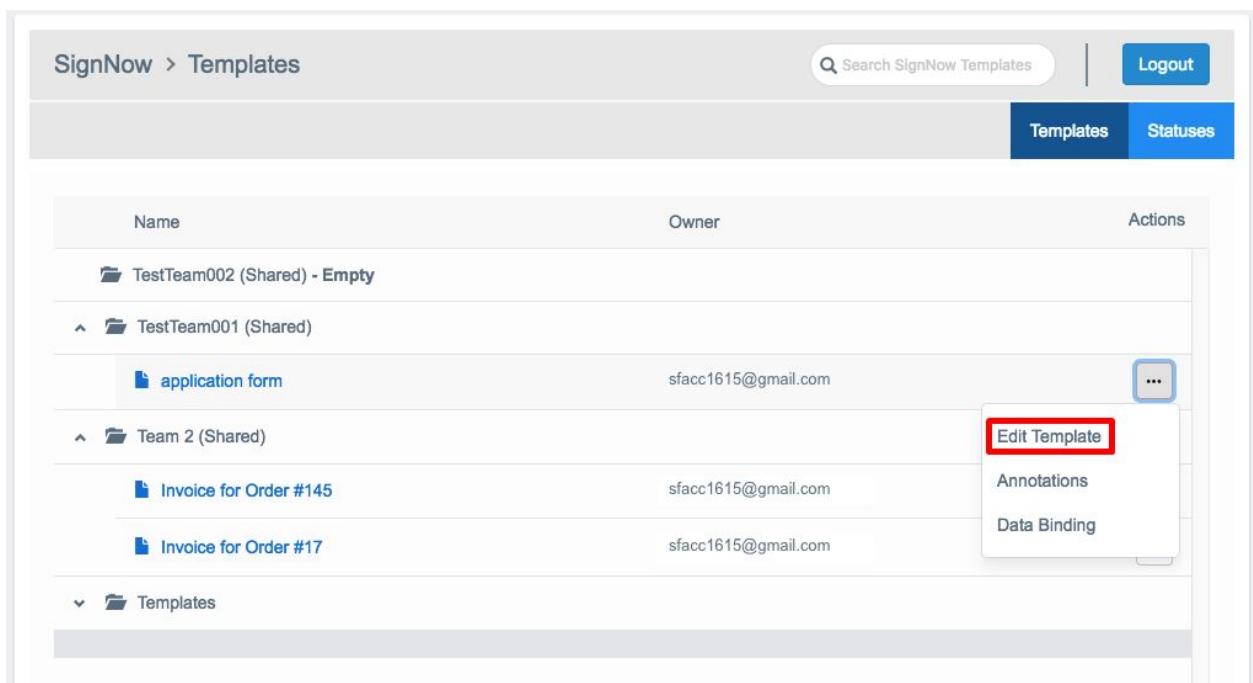
The image shows a login form with the following elements:

- Section 1:** A red box labeled '1' encloses the 'Email' and 'Password' input fields for the SignNow account.
- Section 2:** A red box labeled '2' encloses the 'Username' and 'Password' input fields for the MS Dynamics account.
- Section 3:** A red box labeled '3' encloses the blue 'Login' button.

3. On the next page, click the template you'd like to send out for e-signing from the list.



3.1. Alternatively, from the options dropdown menu, select *Edit Template* to edit the template in SignNow (add fillable fields, checkboxes, radio buttons, etc.) before sending it out.



Note: apply your changes in the SignNow application by clicking *Reload* once a document has been edited.

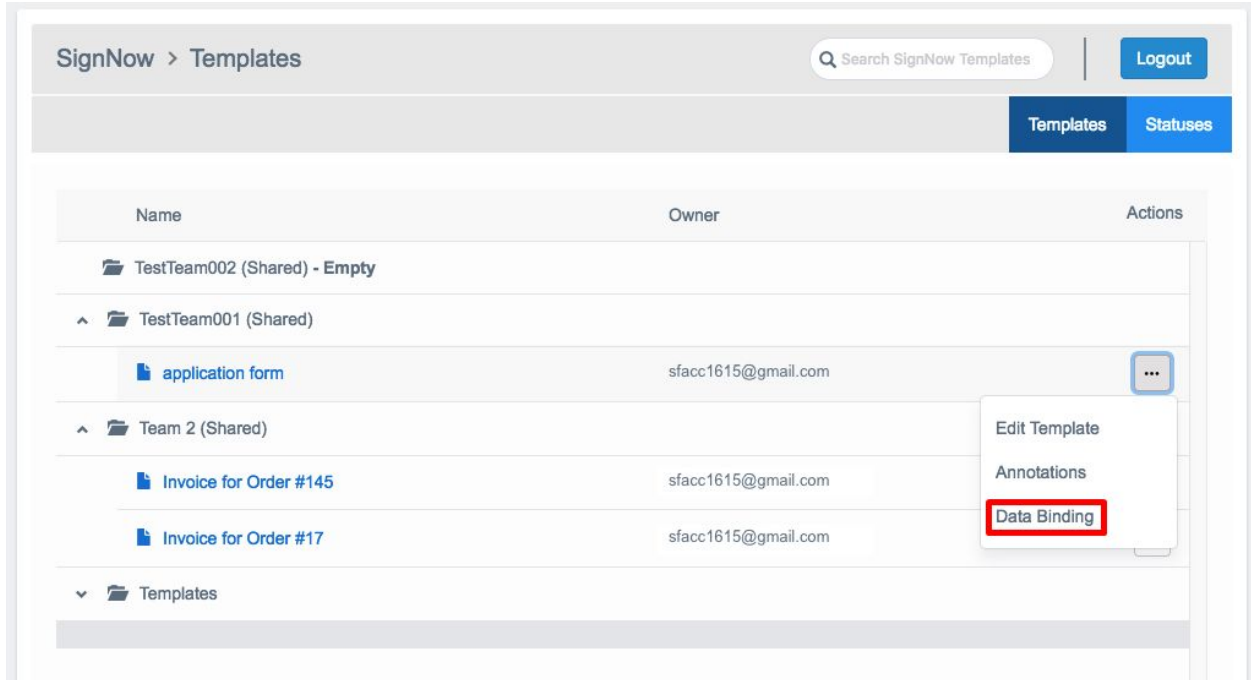
Reload! After editing and saving the template click the Reload button. [Reload](#)

Select *Annotations* to add annotation fields to your document in SignNow if needed.

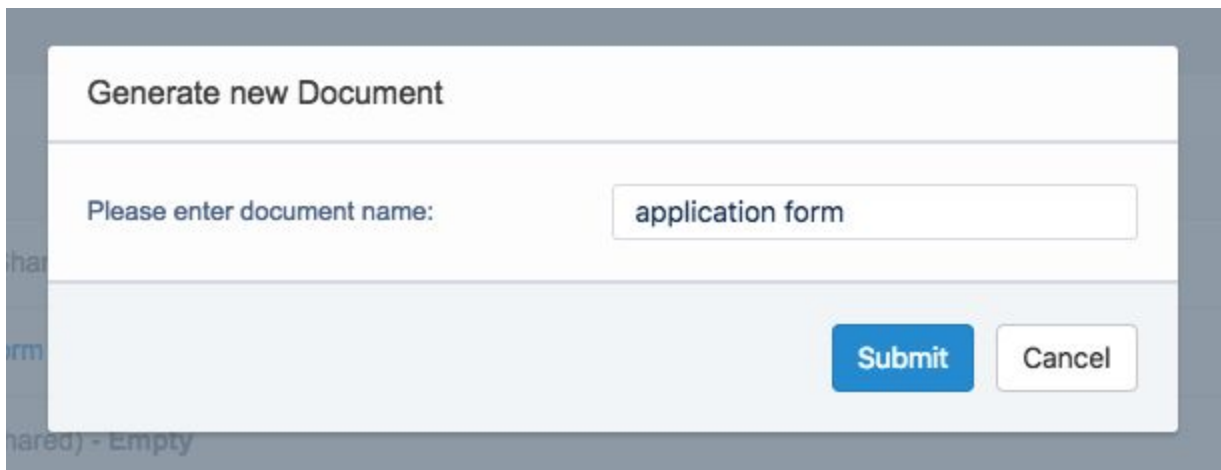
The screenshot shows the SignNow Templates page. At the top, there is a breadcrumb 'SignNow > Templates', a search bar 'Search SignNow Templates', and a 'Logout' button. Below this are two tabs: 'Templates' (selected) and 'Statuses'. The main content is a table with columns 'Name', 'Owner', and 'Actions'. The table lists several templates, including 'TestTeam002 (Shared) - Empty', 'TestTeam001 (Shared)', 'application form', 'Team 2 (Shared)', 'Invoice for Order #145', and 'Invoice for Order #17'. A context menu is open over the 'application form' template, showing options: 'Edit Template', 'Annotations' (highlighted with a red box), and 'Data Binding'.

Name	Owner	Actions
TestTeam002 (Shared) - Empty		
TestTeam001 (Shared)		
application form	sfacc1615@gmail.com	...
Team 2 (Shared)		
Invoice for Order #145	sfacc1615@gmail.com	
Invoice for Order #17	sfacc1615@gmail.com	
Templates		

Select *Data Binding* to pre-fill the template with data form the Dynamics 365 record or to update the Dynamics record's fields when the document is filled.



4. Enter a name for the document being generated and click *Submit*.



5. In the next window, enter a recipient's email, specify recipients in the CC field who will get a notification once a document has been signed and add a subject and body if needed.

SignNow > Send Document For Signing

application form

(1) Signer 1 sfacc1615@mgail.com [Advance settings](#) ▼

Cc [?] sfacc1615+1@mgail.com

Subject sfacc1615+2@mgail.com Needs Your Signature

Body sfacc1615+2@mgail.com invited you to sign document application form

5.1. Use Advanced settings to password protect your document, set an expiration date and enable reminders for your recipients.

[Advance settings](#) ▲

Password

Expiration Days

30

Reminder

0

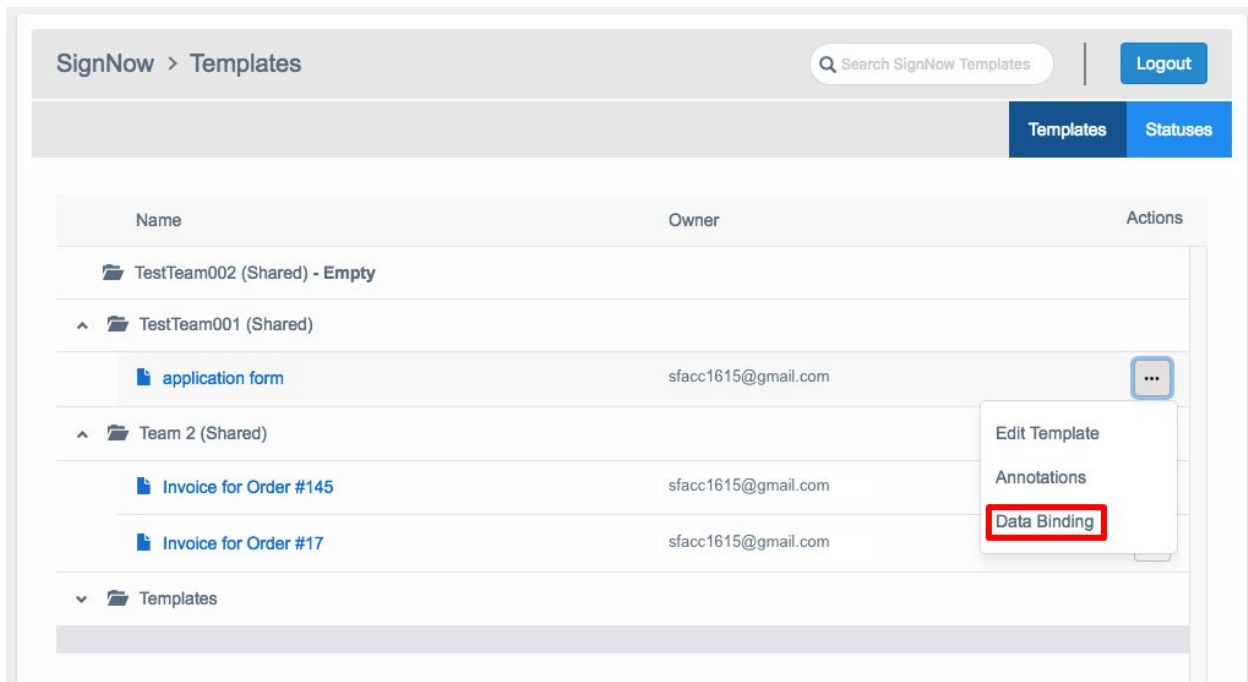
Allow Forwarding

Once your sending has been properly set, click *Send*.

Data Binding

Easily update data in Dynamics 365 object records or data in your documents with the Data Binding option. The Dynamics 365 object record fields will be updated using data from a filled document and the documents will be updated with data from Dynamics 365 object record fields. To do this, follow the step-by-step instructions below:

1. Click the *SignNow* button on your Dynamics 365 object record page:
2. On the page that will open next, choose the document you need. In the Option menu, choose *Data Binding*:



The Data Binding settings window will open:

3. Specify your current Dynamics record type and the fields you'd like to populate data from.

If the Update Dynamics record field is checked, then the Dynamics record fields will be updated with the data from your document fields.

Choose the action for a specified field from the dropdown.

1) Select *Prefill record from Dynamics* to populate the field with data from the desired Dynamics object record.

If the *Update Dynamics Record* box is checked, then the document fields will be updated with the data from Dynamics record fields. After a user has changed prefilled data, it will be populated in the Dynamics record fields.

Data Binding ✕

Enter Integration Record Type:

? Record Field 1: Update Dynamics Record

Prefill record from Dynamics ▼

2) Selecting *Don't prefill record from Dynamics* will not populate the specified field with data from a desired Dynamics object record.

However, if the *Update Dynamics Record* box is checked, the Dynamics record fields will be updated with the data from your document fields.

Data Binding

Enter Integration Record Type:

contact

Record Field 1: Update Dynamics Record

Don't prefill record from Dynamics ▼ lastname

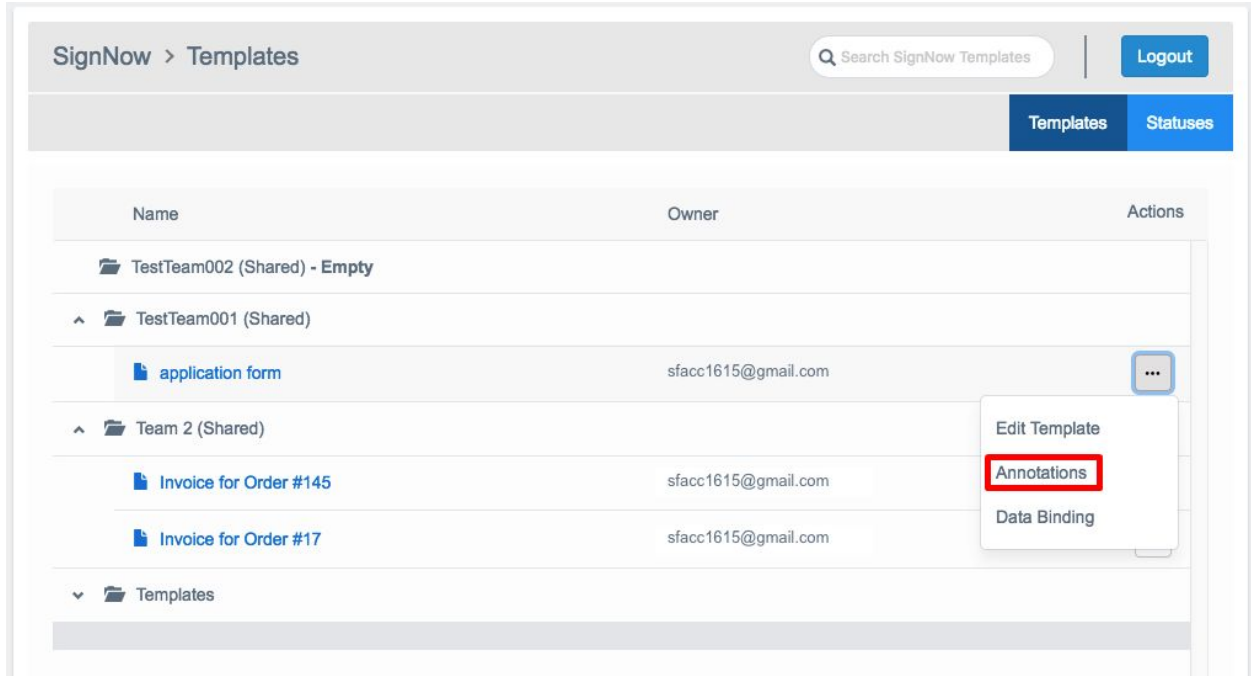
Submit Cancel

Annotations

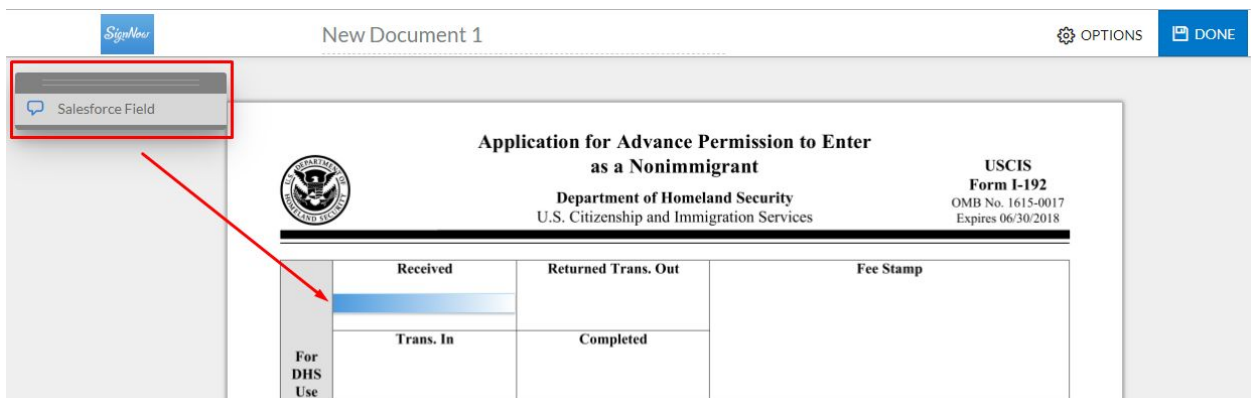
Easily add Annotation Fields to your SignNow templates and connect them to Dynamics 365 object record fields with Annotations. Once your customers have received your template, such fields will be automatically filled with data from the particular Dynamics object record fields you previously specified.

This section will guide you through the process of adding annotations to your SignNow templates.

1. On your object record page, click the *SignNow* button.
2. The Template tab will open. In the Select Option dropdown menu, select your desired template, choose *Annotations* to add annotation fields to your document in SignNow.



3. Once the template has been opened, click *Dynamics 365 Field* in the upper left corner. Then, drag and drop the field wherever you need in the document.



4. In the field you've added, specify the Dynamics object and the Dynamics object record field to populate the annotation field with. It is required to enter the object's name first, then type the field's name you want to get data from, separating them with a full stop.

SignNow New Document 1 OPTIONS DONE

Salesforce Field

Application for Advance Permission to Enter as a Nonimmigrant

Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-192
OMB No. 1615-0017
Expires 06/30/2018

Received	Returned Trans. Out	Fee Stamp
Contact.Name	Completed	
Action by the Department of Homeland Security		

For DHS Use Only OK

Granted, subject to revocation at any time, upon the

When the Dynamics object and field names have been specified, click **OK**.

Once the Annotation fields have been added, click *Done* in the upper right corner to save your settings.

That's it! Now you can send your template out for signing to recipients. When they open your document, it will have its Dynamics Annotation fields populated with data from the specified Dynamics object.

SignNow i-192 OPTIONS DONE

Salesforce Field

Application for Advance Permission to Enter as a Nonimmigrant

Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-192
OMB No. 1615-0017
Expires 06/30/2018

Received	Returned Trans. Out	Fee Stamp
Trans. In	Completed	
Opportunity.Amount		
Action by the Department of Homeland Security		

For DHS Use Only

Granted, subject to revocation at any time, upon the



**Application for Advance Permission to Enter
as a Nonimmigrant**

Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-192
OMB No. 1615-0017
Expires 06/30/2018

For DHS Use Only	Received	Returned Trans. Out	Fee Stamp
	Trans. In	Completed	
	18000		
Action by the Department of Homeland Security			
<input type="checkbox"/> Granted, subject to revocation at any time, upon the following terms and conditions:		Date of Action (mm/dd/yyyy) _____ DD or OIC _____ Office _____	

Document Status

Instantly view, update or cancel your signature requests. All sent requests are shown in the table with the following details: document name, recipient email(s), status (pending or fulfilled), date sent, date signed and date of expiration.

The steps below will help you manage your e-signature requests.

1. In the Template tab, click *Statuses* in the upper right corner.

SignNow > Templates

Search SignNow Templates | Logout

Templates **Statuses**

Name	Owner	Actions
TestTeam002 (Shared) - Empty		
TestTeam001 (Shared)		
application form	sfacc1615@gmail.com	...
Team 2 (Shared)		
Invoice for Order #145	sfacc1615@gmail.com	...
Invoice for Order #17	sfacc1615@gmail.com	...
Templates		

2. A list containing sent documents will open. Here you can check the status of each document you've sent out to be e-signed.

SignNow > Documents Statuses

Show canceled

Templates **Statuses**

Name	Sent To	Status	Date Sent	Date Signed	Expiration	Actions
SIMPLE. 1 text field. 1 role Signer. No PB. No ...	some@email.ts	pending	6/7/2018 19:16		(5/8/2018)	...
blank	some@email.ts	pending	9/7/2018 19:35		(8/8/2018)	...
blank	some@email.ts	pending	9/7/2018 21:05		(8/8/2018)	...
SAM-001	some@email.ts	pending	10/7/2018 11:56		(9/8/2018)	...
new name	some@email.ts	fulfilled	10/7/2018 15:36	10/7/2018 15:58	(14/7/2018)	
2 fields DN renamed	(1) some@email.ts (1) some+2@email.ts	pending	10/7/2018 17:09		(23/8/2018) (9/8/2018)	...
conference invite	some+3@email.ts	pending	10/7/2018 18:01		(22/7/2018)	...
pushback test	some@email.ts	fulfilled	30/8/2018 5:06	30/8/2018 5:07	(29/9/2018)	
test_blank	some@email.ts	fulfilled	30/8/2018 13:29	30/8/2018 13:30	(29/9/2018)	

If you don't hear back from your customers or your documents haven't been signed, you can update or cancel your signature request as well as adjust advanced settings for your signature requests. To do this, proceed to the document with a pending status and click on the Actions menu. In the Actions dropdown, choose your desired action.

SignNow > Documents Statuses Show canceled

Templates **Statuses**

Name	Sent To	Status	Date Sent	Date Signed	Expiration	Actions
SIMPLE. 1 text field. 1 role Signer. No PB. No ...	some@email.ts	pending	6/7/2018 19:16		(5/8/2018)	1
blank	some@email.ts	pending	9/7/2018 19:35			2
blank	some@email.ts	pending	9/7/2018 21:05			
SAM-001	some@email.ts	pending	10/7/2018 11:56			
new name	some@email.ts	fulfilled	10/7/2018 15:36	10/7/2018 15:58	(14/7/2018)	

Replace Signer

Advanced Settings

Cancel Invite

Select *Replace Signer* to replace a recipient. Specify a new email address and click *Submit*.

SIMPLE. 1 text field. 1 role Signer. No PB. No ...	some@email.ts	pending	6/7/2018 19:16		(5/8/2018)	
blank	some@email.ts	pending	9/7/2018 19:35			Replace Signer
blank	some@email.ts	pending	9/7/2018 21:05			Advanced Settings
SAM-001	some@email.ts	pending	10/7/2018 11:56			Cancel Invite

Select *Advanced settings* to set or change a document password, modify the expiration date or set a reminder for your recipients.

SIMPLE. 1 text field. 1 role Signer. No PB. No ...	some@email.ts	pending	6/7/2018 19:16		(5/8/2018)	
blank	some@email.ts	pending	9/7/2018 19:35			Replace Signer
blank	some@email.ts	pending	9/7/2018 21:05			Advanced Settings
SAM-001	some@email.ts	pending	10/7/2018 11:56			Cancel Invite

Select *Cancel Invite* to cancel an invite and remove it from the list.

SIMPLE. 1 text field. 1 role Signer. No PB. No ...	some@email.ts	pending	6/7/2018 19:16	(5/8/2018)	...
blank	some@email.ts	pending	9/7/2018 19:35		Replace Signer
blank	some@email.ts	pending	9/7/2018 21:05		Advanced Settings
SAM-001	some@email.ts	pending	10/7/2018 11:56		Cancel Invite

Click *Show Canceled* to display all the invites including canceled ones.

SignNow > Documents Statuses

Show canceled

Templates Statuses

Name	Sent To	Status	Date Sent	Date Signed	Expiration	Actions
SIMPLE. 1 text field. 1 role Signer. No PB. No ...	some@email.ts	pending	6/7/2018 19:16		(5/8/2018)	...
blank	some@email.ts	pending	9/7/2018 19:35		(8/8/2018)	...