

DocuSign for Microsoft Dynamics 365 v7.0 User Guide (PDF)

Published: August 18, 2021

Copyright

Copyright ©2003-2021 DocuSign, Inc. All rights reserved.

For information about DocuSign trademarks, copyrights and patents refer to the DocuSign Intellectual Property page (<https://www.docusign.com/IP>) on the DocuSign website. All other trademarks and registered trademarks are the property of their respective holders.

No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of DocuSign, Inc. Under the law, reproducing includes translating into another language or format. Every effort has been made to ensure that the information in this manual is accurate. DocuSign, Inc. is not responsible for printing or clerical errors. Information in this document is subject to change without notice.

Table of Contents

| | |
|---|-----------|
| DocuSign for Dynamics 365 CRM..... | 5 |
| Install DocuSign for Dynamics | 5 |
| Uninstall DocuSign for Dynamics..... | 7 |
| Configure DocuSign for Dynamics | 8 |
| Enable Sign and Send with DocuSign actions for Entities..... | 12 |
| Manage User Access to DocuSign | 13 |
| User access basics..... | 13 |
| Assign the DocuSignUser role..... | 14 |
| Edit the DocuSign Users table..... | 15 |
| Send an Envelope..... | 16 |
| Sign Documents | 20 |
| Send to Multiple Recipients Using Bulk Send..... | 21 |
| Enable Bulk Send | 21 |
| Create a Bulk Send Address List (Admins)..... | 22 |
| Edit a Bulk Send Address List (Admins)..... | 24 |
| Create a Bulk Send Address List (Users)..... | 25 |
| Edit a Bulk Send Address List (Users)..... | 29 |
| Send an Envelope Using a Bulk Send Address List..... | 29 |
| Integrate SharePoint Files..... | 34 |
| Enable SharePoint file integration..... | 35 |
| Customize DocuSign for Dynamics | 37 |
| Create Custom Buttons..... | 37 |
| DocuSign Custom Activities..... | 42 |

| | |
|---|-----------|
| Add Custom Activities to Process Steps..... | 43 |
| CreateEnvelope..... | 44 |
| Add Document..... | 45 |
| Merge Field/Merge Multiple Fields..... | 45 |
| Add Recipient..... | 46 |
| Add InPerson Signer..... | 47 |
| Get Signatures..... | 47 |
| Get Signing View..... | 48 |
| Get Field Value..... | 48 |
| | |
| Merge Fields: Dynamics to DocuSign..... | 49 |
| | |
| Merge Fields: DocuSign to Dynamics..... | 53 |
| | |
| AutoPlace Fields in Custom Buttons | 54 |
| | |
| Track Agreement Status | 56 |
| Manually Update Envelope Statuses..... | 57 |
| Restore Envelopes..... | 58 |
| | |
| Enable Plug-in Trace Logs for Client-side Debugging..... | 58 |
| | |
| Troubleshooting..... | 59 |
| Error: Request not supported:..... | 59 |
| Error: An unexpected error occurred from ISV code..... | 59 |
| | |
| Release Notes..... | 60 |

DocuSign for Dynamics 365 CRM

This guide provides information on installing, signing, and sending documents for signature with DocuSign for Microsoft Dynamics. The primary audience for this guide is Microsoft Dynamics 365 CRM administrators. The installation and configuration tasks presented all require administrative rights. End users benefit from the topics [Send with DocuSign](#), [Sign Documents with DocuSign](#), and the general FAQ items.

Supported Versions

DocuSign eSignature for Microsoft Dynamics v7 supports the following versions and browsers:

- **Microsoft Dynamics 365 CRM - v8.1 and later:** Internet Explorer 11; Microsoft Edge; Chrome (latest version); Firefox (latest version)

Important: It is not possible to upgrade from version 6.2.0.13 or earlier to version 6.2.1 or later. To upgrade in this instance, you must completely uninstall all DocuSign elements and then perform a fresh install of the new version. Note that the status of any existing envelopes will not be preserved, and sent envelopes will not be able to write back to Dynamics.

Restriction: This software does not support any Microsoft Dynamics 365 CRM on-premises instances.

Early Access Notifications for Releases

For major releases, you can opt in to our Early Access list to receive notifications and pre-release versions before they are publicly available. To opt in, send an email request to dyn@docusign.com with your name and email address to receive Early Access notifications.

Install DocuSign for Dynamics

Important:

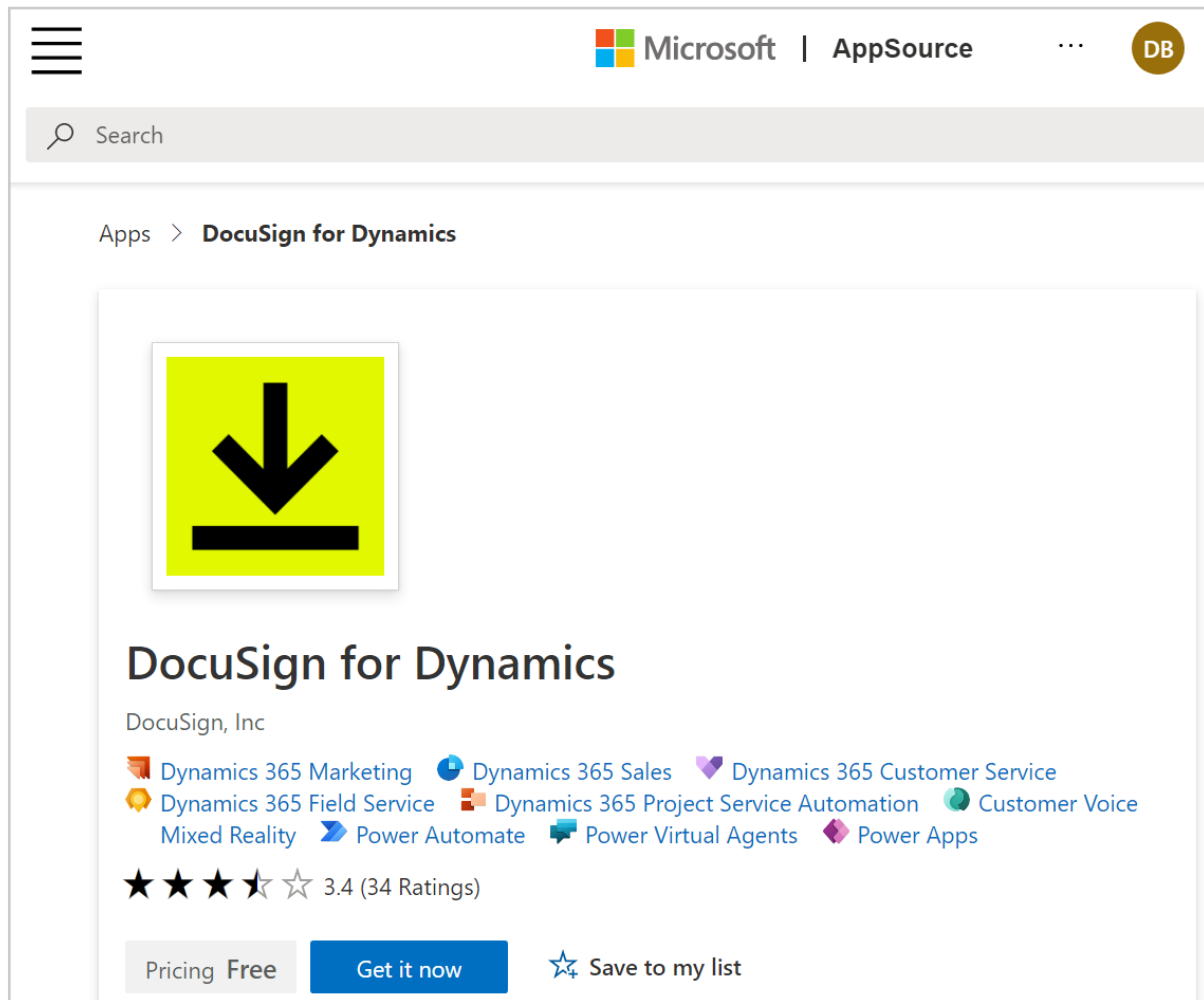
You must be an Office 365 Global administrator to install and configure the DocuSign application. DocuSign for Dynamics 365 does not support the cloning of Dynamics instances. Please uninstall the integration prior to cloning an environment and reinstall afterward.

Follow these steps to install the application or upgrade from an older installed version:

Note: When upgrading to a new version of the solution, all DocuSign status data and the system-wide login credentials are retained in Dynamics 365 CRM.

1. (Optional) If you are upgrading, as a best practice, we recommend that you export your Microsoft Dynamics 365 CRM customizations. After you complete the upgrade, if necessary, you can re-import your customizations.

2. Follow this [link](#) to go to Microsoft AppSource.



3. On the left, click **Get it now**.

4. Using your work account, sign in to your Microsoft AppSource account, or sign up for an account if you don't already have one.

5. Read and accept the terms of use, and then click **CONTINUE**.

6. On the next screen scroll down and select the organization to which you want to add DocuSign eSignature for Microsoft Dynamics v7.

7. Select the two check boxes to accept legal terms and privacy statements.

8. Click **ACCEPT**.

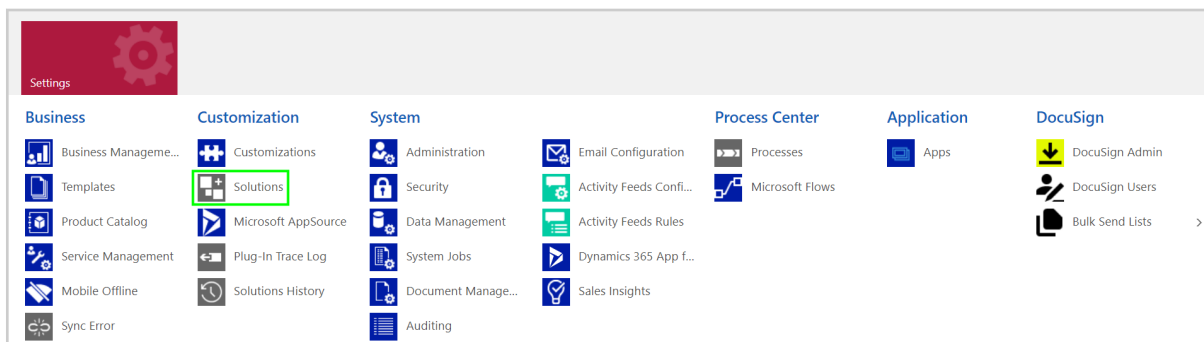
Uninstall DocuSign for Dynamics

Uninstalling the DocuSign application deletes the solution from your Dynamics 365 CRM instance, as well as all DocuSign-related status data.

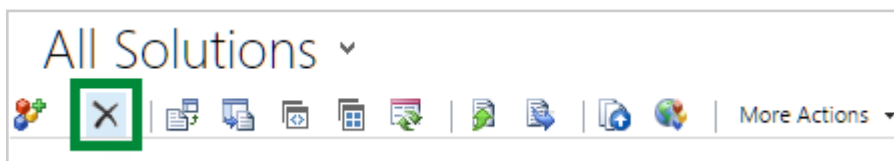
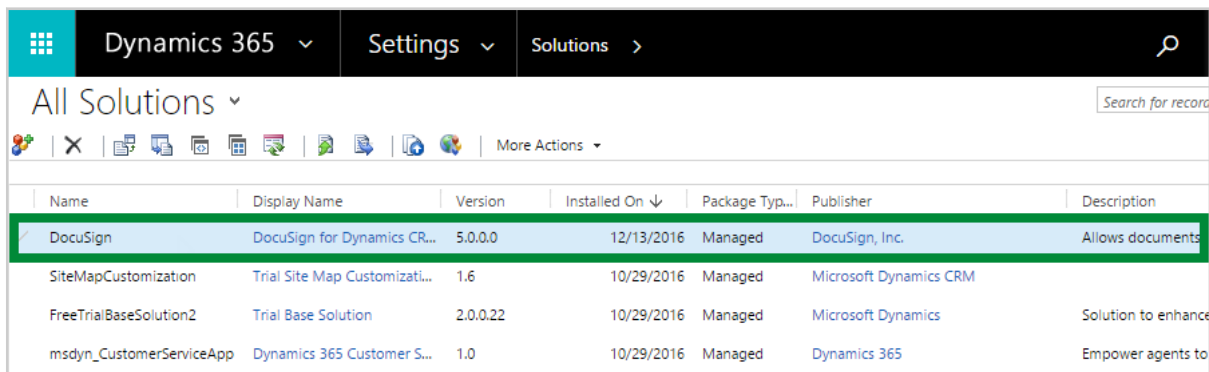
Note: Administrators must remove all dependencies to DocuSign from the Microsoft Dynamics 365 CRM instance before uninstalling, specifically:

- Remove any steps that reference DocuSign-related fields from any custom business process associated with the following entities: Accounts, Contacts, Leads, and Opportunities.
- Remove the DocuSign user role for all users.

1. To uninstall, click **Settings**, and then select **Solutions**.



2. Select the DocuSign solution, and then, on the Action toolbar, click **Delete**.



The DocuSign solution is uninstalled from your Dynamics 365 CRM instance, along with all DocuSign-related status data.

Configure DocuSign for Dynamics

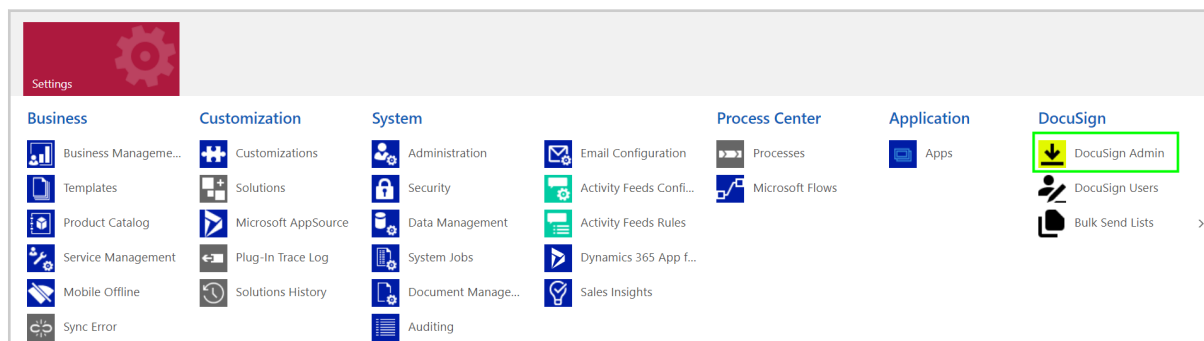
Important: You must be logged in as an Office 365 global administrator.

To complete the basic setup of DocuSign for Dynamics 365 CRM, you must have a DocuSign account, create a configuration to register your DocuSign account credentials, set your DocuSign environment, and allow DocuSign access to your Dynamics data.

After you create the DocuSign Configuration, you can adjust the account settings and enable DocuSign actions on your organization's Dynamics 365 CRM entities.

To create an account configuration

1. From the Main menu, click **Settings**.
2. In **Settings**, under the DocuSign menu option, click **DocuSign Admin**:



3. Follow the on-screen instructions to enter your credentials. Best practice tip: use an integration admin user - a user with DocuSign admin permissions that is a service account just for the integration and that won't change over time.

Note: The DocuSign account connected to Dynamics 365 must allow send on behalf of other users. You must have Admin permissions to enable this setting in your DocuSign account. Go to **Settings > Permission Profiles > Actions > Edit > User Permissions** and select the check boxes for **Allow view and manage envelope rights through API** and **Allow send on behalf of others through API**.

Edit Permission Profile

PowerForms

Standard User ?

These options set template management rights and PowerForms access for your users. [Learn more...](#)

- Can add fields
- Allow signer attachments
- Allow sign on paper override
- Allow recipient viewed notifications
- Allow sending to bulk list
- Allow language selection
- Disable document upload
- Hide Actions menu

Address Book

Use Personal and Shared ▼

Self-signed email notifications are delivered by

PDF ▼

- Allow view and manage envelope rights through API
 - Allow send on behalf of other users through API
- Allow supplemental documents

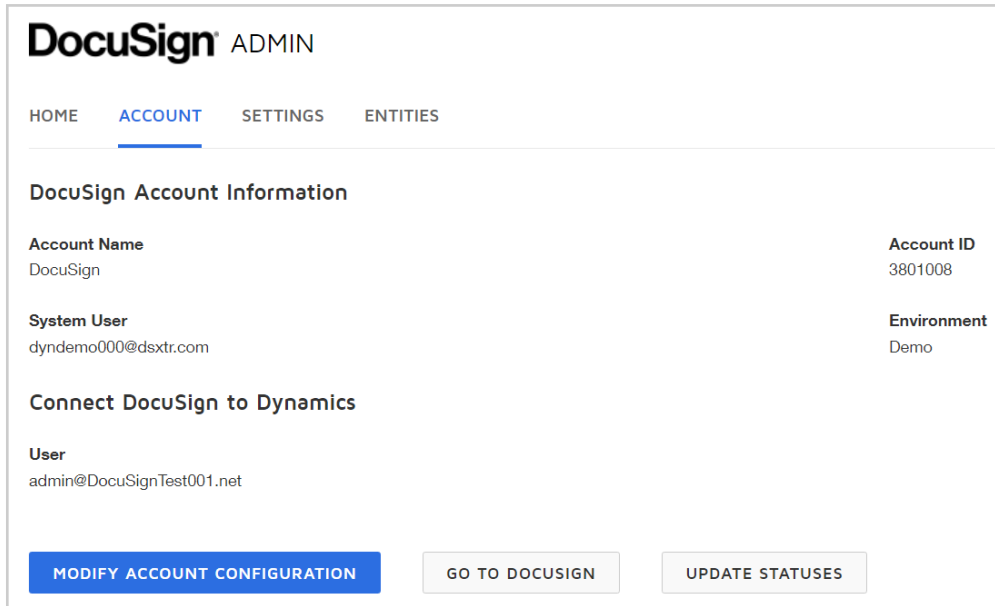
Allow senders to override these signing settings:

- Signers must view supplemental documents (required)

SAVE **CANCEL**

4. In the Authorize DocuSign for Dynamics window, click **Connect** to allow the DocuSign solution to access your Dynamics 365 CRM data. This setting is required to enable all DocuSign functionality in your Dynamics organization.

5. After you have successfully logged in to DocuSign or created a new account, the DocuSign Admin Home screen appears. Click **ACCOUNT** to see your account information.



The screenshot shows the DocuSign Admin interface. At the top left is the DocuSign logo followed by 'ADMIN'. Below this is a navigation bar with 'HOME', 'ACCOUNT' (highlighted with a blue underline), 'SETTINGS', and 'ENTITIES'. The main content area is titled 'DocuSign Account Information' and contains two sections. The first section, 'Account Information', lists 'Account Name' as 'DocuSign' and 'Account ID' as '3801008'. The second section, 'System User', lists 'System User' as 'dyndemo000@dsxtr.com' and 'Environment' as 'Demo'. Below this is a section titled 'Connect DocuSign to Dynamics' with 'User' listed as 'admin@DocuSignTest001.net'. At the bottom of the page are three buttons: 'MODIFY ACCOUNT CONFIGURATION' (a blue button), 'GO TO DOCUSIGN', and 'UPDATE STATUSES'.

To adjust your account settings

Select **SETTINGS** from the DocuSign Admin screen, and adjust any of the following options.

DocuSign[®] ADMIN

HOME
ACCOUNT
SETTINGS
ENTITIES

Document Settings

Signed document naming convention

DocuSign document subject + "_signed" ▼

Download signed document as

Combined PDF ▼

Include a Certificate of Completion with signed documents

Save completed documents to SharePoint

DISABLE

Email Settings

Default Email Subject

Please review and sign your document

Default Email Message

SAVE

- **Include Certificate of Completion:** check to include Certificate of Completion (CoC) along with completed documents when a copy is saved to Dynamics.

Include a Certificate of Completion with signed documents

- **Save completed documents to SharePoint:** enable saving an additional copy of completed documents to SharePoint. When enabled, a copy of the completed documents will save both to SharePoint and Dynamics. See [Integrate SharePoint Files](#) for more information.

Save completed documents to SharePoint

- **Signed document naming convention:** select the format of the file name for the copy of completed documents. The timestamp represents the time the Dynamics CRM system received the documents from DocuSign.

Signed document naming convention

DocuSign document subject + "_signed" ▼

DocuSign document subject + "_signed"

DocuSign document subject + "_signed" + timestamp

- **Email Settings:** Modify the default email subject and message that is sent to all recipients when sending a document for signature.

Email Settings

Default Email Subject

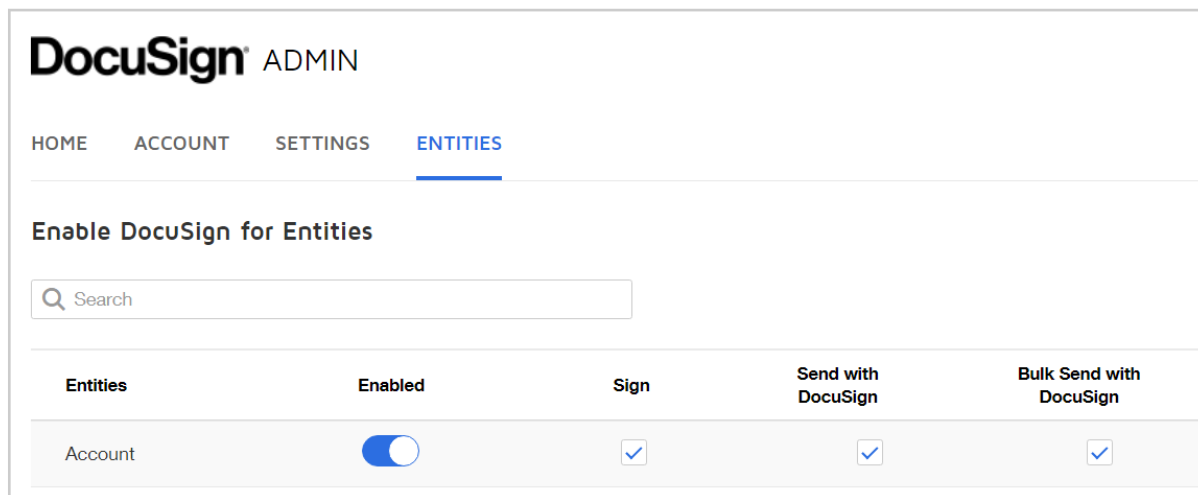
Please review and sign your document

Default Email Message

- Click **SAVE** to save your Settings changes.

Enable Sign and Send with DocuSign actions for Entities

1. Click **ENTITIES**, **Enabled**, **Sign** and **Send with DocuSign**. By default, Send with DocuSign is enabled for the Account, Opportunity, Contact, Lead, and Quote entities. The actions display in the ribbon bar of entities for which they are enabled. Hover over the entity name to see the fully qualified name of the entity, including the namespace.



2. On the bottom left, click **SAVE** to save your Entities changes.

Manage User Access to DocuSign

Before your users can use DocuSign for Dynamics 365, they must:

- be a member of the DocuSign eSignature account connected to that Dynamics instance. The DocuSign account is specified in the DocuSign Admin configuration settings.
- be assigned the DocuSignUser role in Dynamics

User access basics

To use DocuSign to sign or get signatures, Dynamics users must be members of the DocuSign account specified in the DocuSign Admin. As long as Dynamics users are members in the DocuSign account, using the same email address as in the Dynamics organization, they will be able to seamlessly access the DocuSign functionality. If they use a different email address, or if they are not members in the DocuSign account, then as the DocuSign administrator, you'll need to provide assistance.

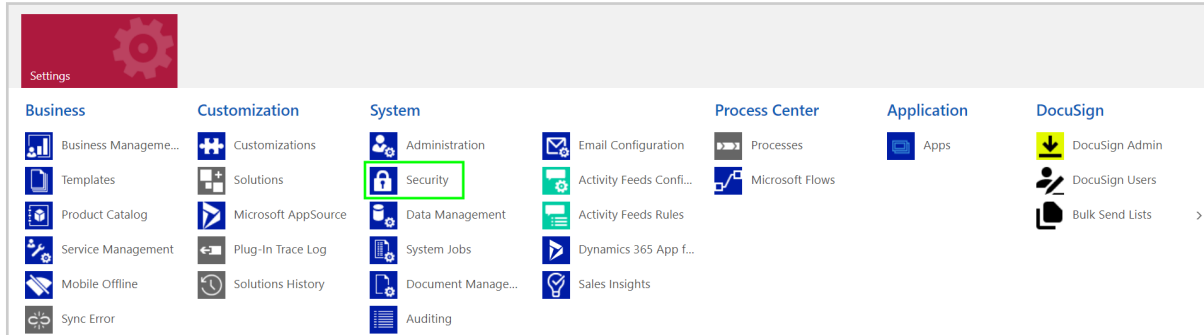
When a Dynamics 365 CRM user executes any DocuSign action, the system checks to see whether that user exists in DocuSign using the email address of the Dynamics user.

- If the user is a member in the DocuSign account specified in the DocuSign Admin, they are added to the DocuSign Users table and they can proceed to use the application.
- If the user is not a member in the DocuSign account, a message instructs the user to contact the solution administrator for assistance. In this case, a DocuSign administrator for the account must add the user manually, as described in [this Help guide](#).

Assign the DocuSignUser role

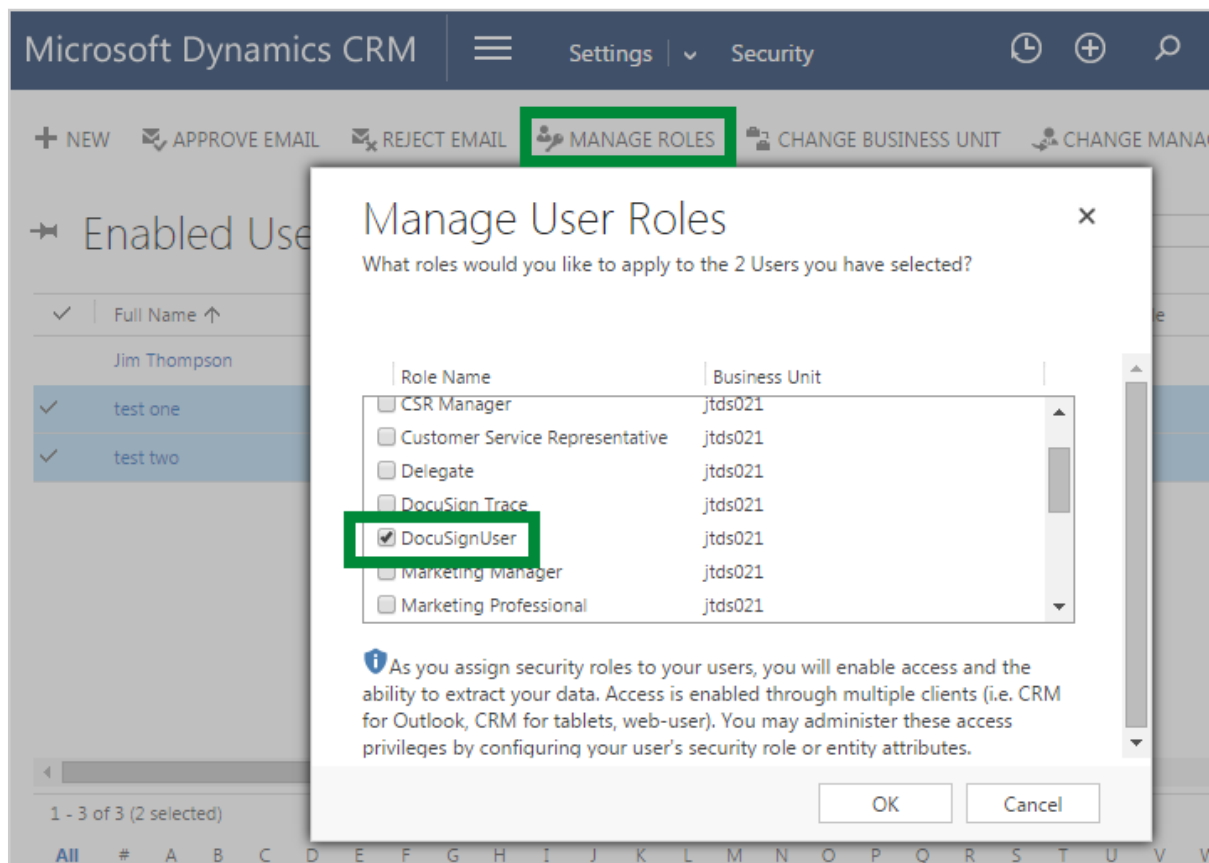
For a non-administrative user of Dynamics 365 CRM to have access to DocuSign solution, as the Dynamics 365 CRM administrator, you must edit the user's record to assign the DocuSignUser role.

1. Log in as a Dynamics 365 CRM administrator.
2. Navigate to the **Settings** > **Security** view.



3. Click **Users**.
4. Locate the user record for the person to which you want to grant access, and select it. You can select multiple records at once.

5. Click **Manage Roles**, and then select the **DocuSignUser** role.



Note: You may notice a DocuSign Trace role. This is a system role, used for debugging purposes only; do not assign users to this role.

6. Click **OK**.

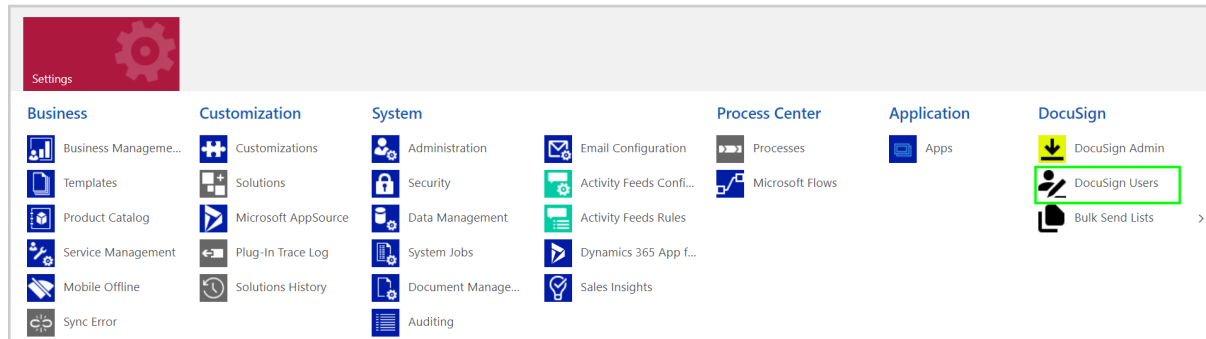
The user is assigned the role and has access to DocuSign eSignature for Microsoft Dynamics v7.

Edit the DocuSign Users table

As the Dynamics 365 CRM administrator, you can edit the DocuSign Users table to correct or add entries. For example, if a Dynamics user has a different email address for the DocuSign membership, you can add them to the table manually.

1. Log in as a Dynamics 365 CRM administrator.

2. Navigate to the **Settings > DocuSign Users** view.



3. To edit an existing record,

- a) Locate and select the user record, and then click **Edit**.
- b) Update the DocuSign Email field to match the address used in the DocuSign account.
- c) Click **SAVE**.

4. To add a record,

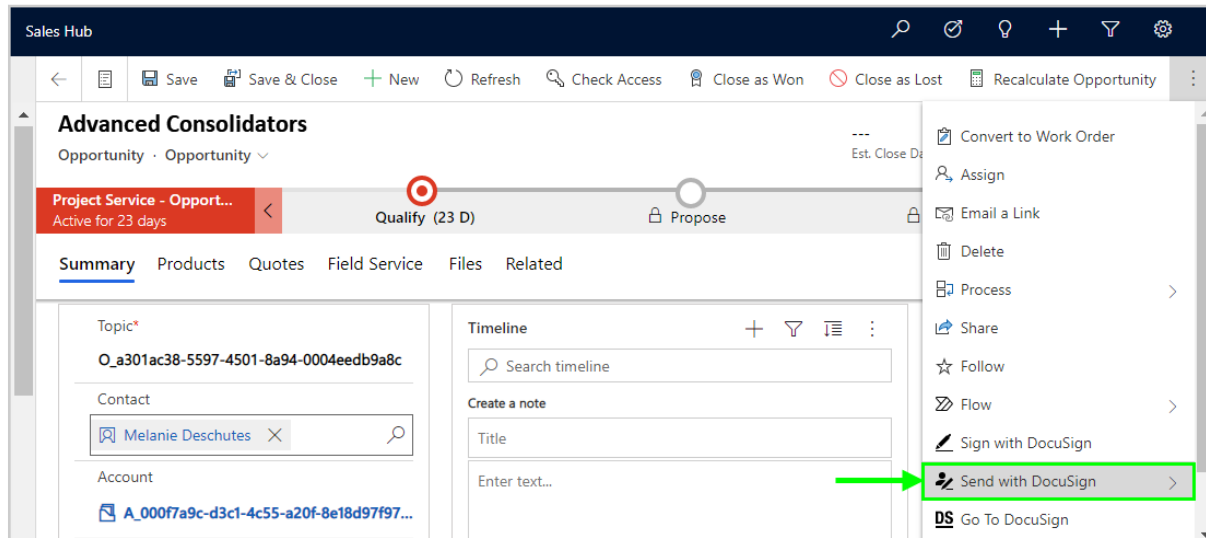
- a) Click **NEW**.
- b) In the System User field, enter or search for and select the user's name.
- c) In the DocuSign Email field, type the user's DocuSign email address.
- d) Click **SAVE**.

The next time the user attempts to use the DocuSign solution, the system checks to see whether the user is a member of the DocuSign account, under the email address entered in the DocuSign Users record. If you entered the correct email address, the user will be able to use the solution, and the record in the table will be updated with the remaining DocuSign information.

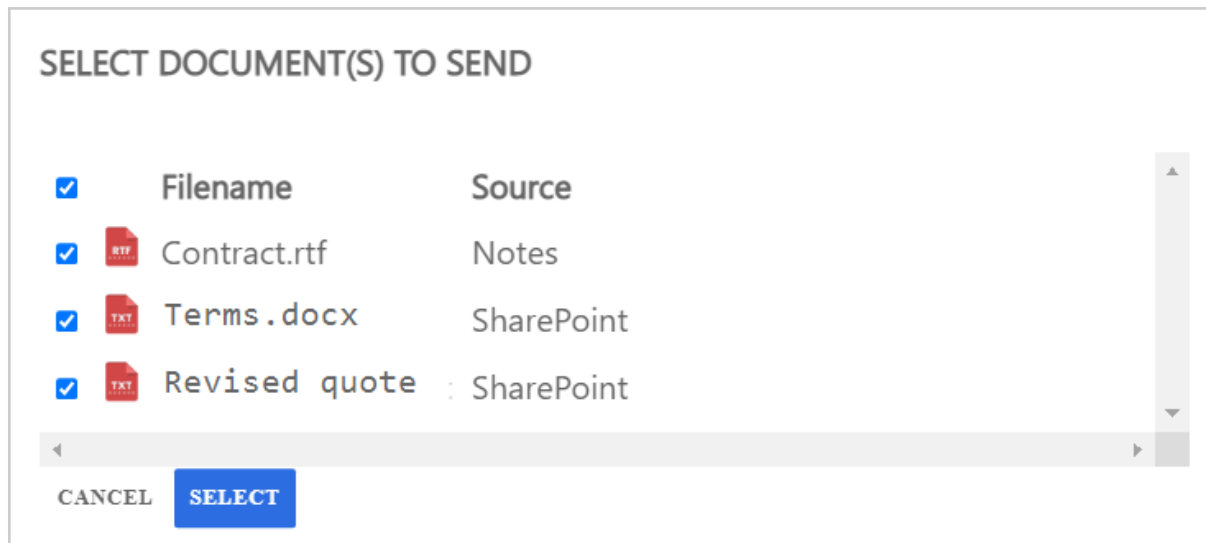
Send an Envelope

1. Select an entity and open the record from which you want to send documents.

2. In the command bar, select **Send with DocuSign > Get Signatures**.



3. Files associated with the Notes of the record are automatically added to the envelope. All SharePoint documents are also added if the SharePoint integration is enabled. You can choose which files to send using the check boxes in **SELECT DOCUMENT(S) TO SEND** window.



4. Contacts associated with the record are automatically added to the envelope. You can select recipients from the record contacts or from any other available contacts in Dynamics. To add other contacts, click **Add Recipients** and use the check boxes to select recipients.

Add Recipients

| <input type="checkbox"/> | Name | Email | Type |
|-------------------------------------|-------------------|-------------------------|---------------|
| <input checked="" type="checkbox"/> | Ted Smith | ted@dsxtr.com | This Contact |
| <input checked="" type="checkbox"/> | Melanie Deschutes | melanie@dsxtr.com | Other Contact |
| <input checked="" type="checkbox"/> | Randall Flagg | randall.flagg@dsxtr.com | Other Contact |

5. When you are done adding contacts and files, select **OPEN DOCUSIGN** to open your DocuSign account and continue the sending process.
6. In DocuSign, you can add other recipients and add additional documents, recipients, and an email message to recipients. See [Add Recipients](#) for more information.

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

Set signing order

| | | | |
|-------|---|-------------------|----------|
| Name | ✖ | ✍ NEEDS TO SIGN ▼ | ⋮ MORE ▼ |
| Email | | | |

- **To add the first recipient**, enter the name and email address, and then select the recipient action.
- **To add an additional recipient**, click **Add Recipient**, enter the name and email address, and select the recipient action.
- **To remove a recipient**, click the **X** to the right of the recipient's row
- **To change the signing order**, select the **Set signing order** check box, and then select the number next to a recipient's name and enter a new value. Recipients can sign in a set order, at the same time, or a mixture of both.

7. Review the **Message to All Recipients** and adjust the subject and message as needed.

Message to All Recipients

Custom email and language for each recipient

Please review and sign your document

Someone has sent you a new DocuSign document to view and sign. Please click on the 'View Documents' link below to begin signing. Thank you.

Advanced Options | [Edit](#)

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires

8. Click **Next** to continue and open the DocuSign **Add Fields** view.

Dexter Sardinops
74%


Search Fields

Standard Fields

- Signature
- Initial
- Date Signed

- Name
- Email
- Company
- Title

- Text
- Checkbox
- Dropdown
- Radio



Certificate of Completion

Advanced Paleochemistry Workshop

Melanie Deschutes

Date Date Signed

Advisor Full Name

Sign

9. To assign fields to a recipient, select the recipient in the Recipients list and drag and drop fields from the list onto your document.

For more information about adding fields, see [Add Fields](#).

10. To make further changes to the documents, recipients, reminders, and expiration settings, select **OTHER ACTIONS** at the top right of the document window and select the item you want to edit.

11. Select **SEND** to send the document for signing.

A copy of the envelope will be saved to the originating record in Dynamics once all recipients have signed and the envelope is completed

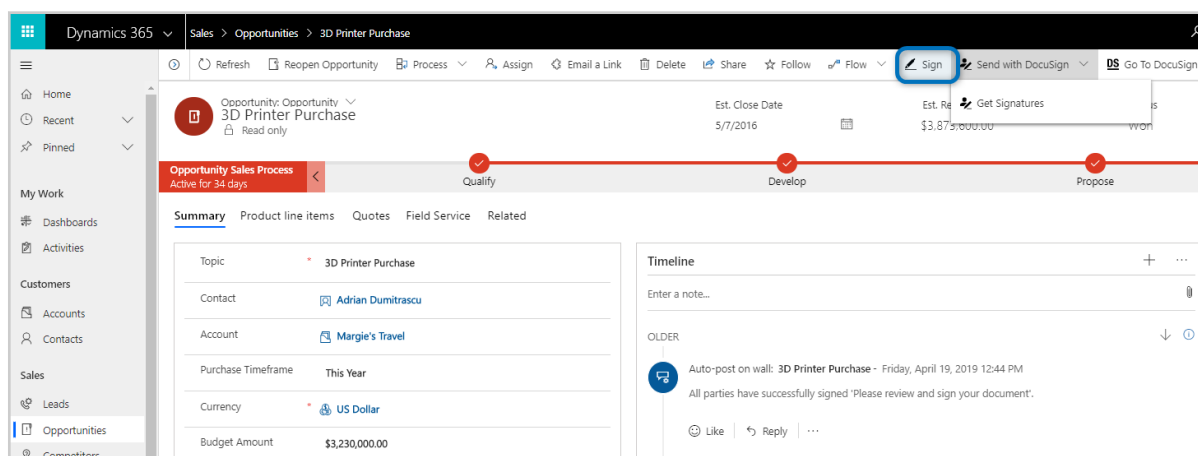
Sign Documents

With DocuSign for Dynamics, you can sign documents directly from records in Dynamics 365 CRM.

The **Sign** action is added to the command bar for all the entities that have been enabled with DocuSign by your Microsoft Dynamics administrator.

To sign documents

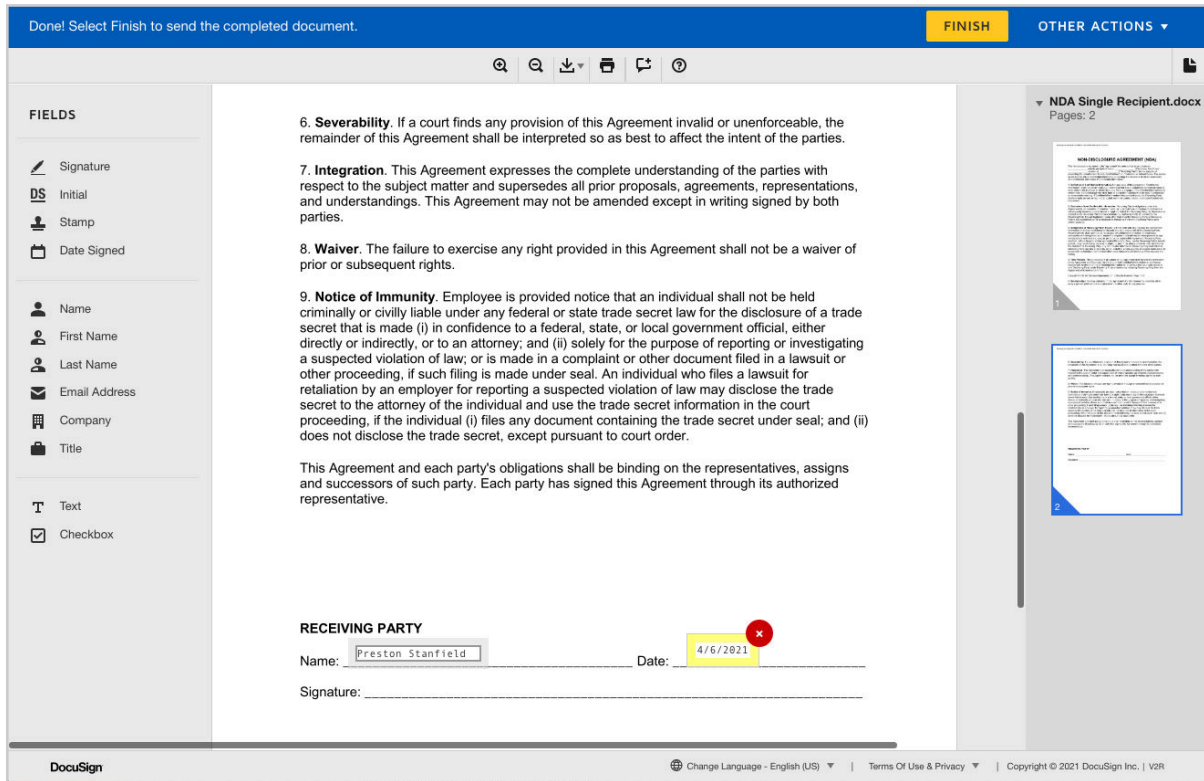
1. Select an entity and open the record from which you want to sign documents.
2. In the command bar, click **Sign with DocuSign**.



A new tab opens in DocuSign where you can add fields to the document and sign. By default, all files attached in the Notes of the Dynamics record will be added to the DocuSign envelope.

3. Click **Continue** to add your fields, such as signature, date signed, or custom text fields.

4. In the Fields palette on the left side of the window, click the field you want to place, and then drag and drop the field to the appropriate location in the document.



5. Click **Finish**. You have successfully signed the document with DocuSign. The signed document is saved as a PDF file in the Notes section on the entity from which you signed the document.

Send to Multiple Recipients Using Bulk Send

Bulk Send lets you send an envelope to multiple recipients with one click. DocuSign generates a unique Envelope ID for each recipient. You can create a new Bulk Send address list, or you can use or modify an existing list. When you have selected a Bulk Send address list, you can use it to send an envelope to multiple recipients.

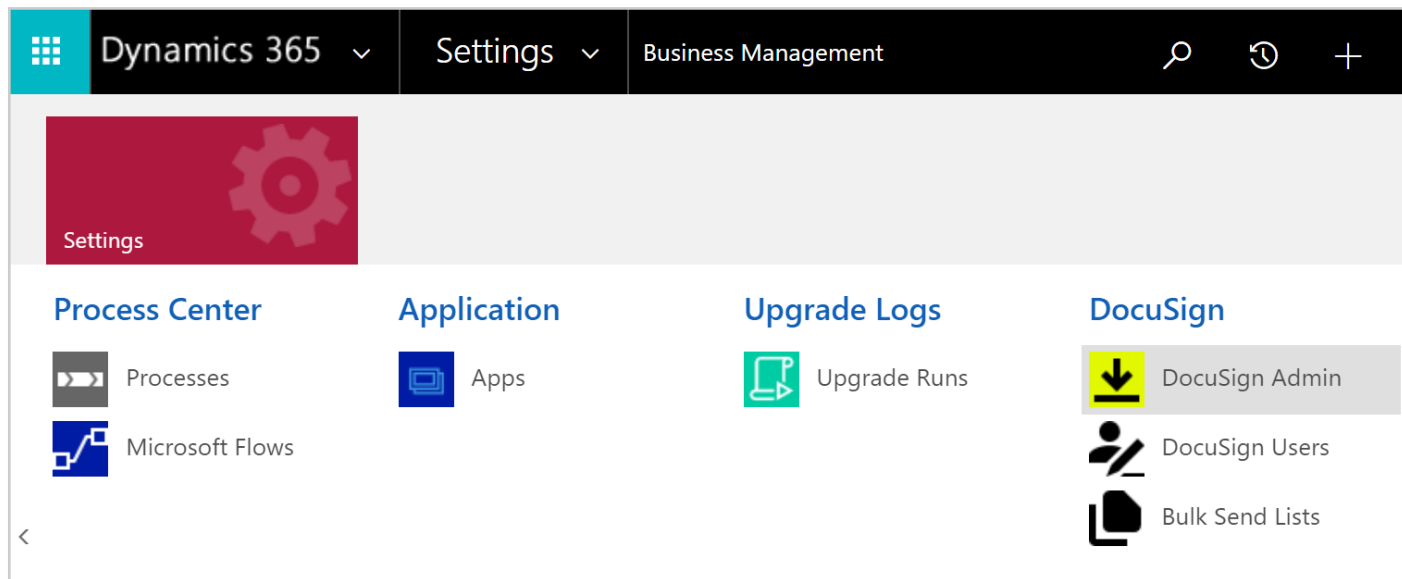
Enable Bulk Send

Only Administrators can enable or disable Bulk Send for specific entities. Once Bulk Send is enabled, any DocuSign user can create and modify Bulk Send lists and use them to send envelopes through DocuSign.

Follow these steps to enable Bulk Send:

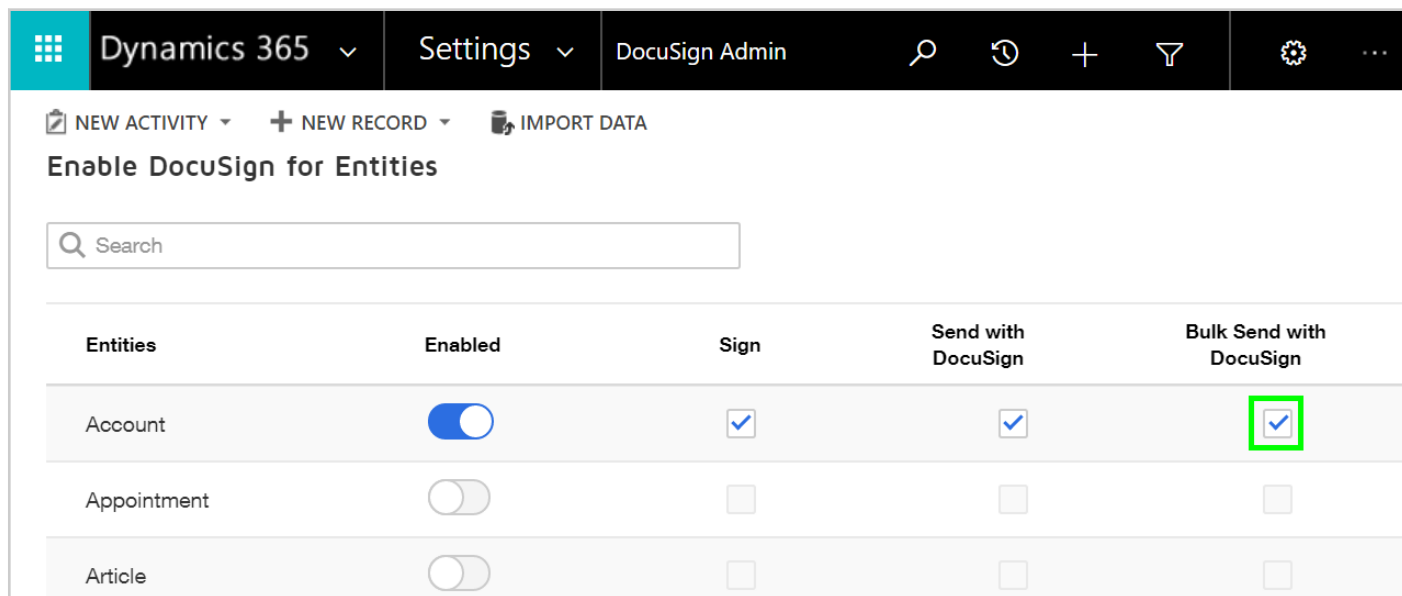
1. Click the gear icon at the top right of the window
2. Select **Advanced Settings** to open a new window
3. Click the down arrow next to **Settings**

4. Scroll over to the **DocuSign** Section



5. Click **DocuSign Admin**

6. Select the **Entities** tab



7. Click the **Bulk Send with DocuSign** toggle for an entity to make Bulk Send available

8. Click **Save**

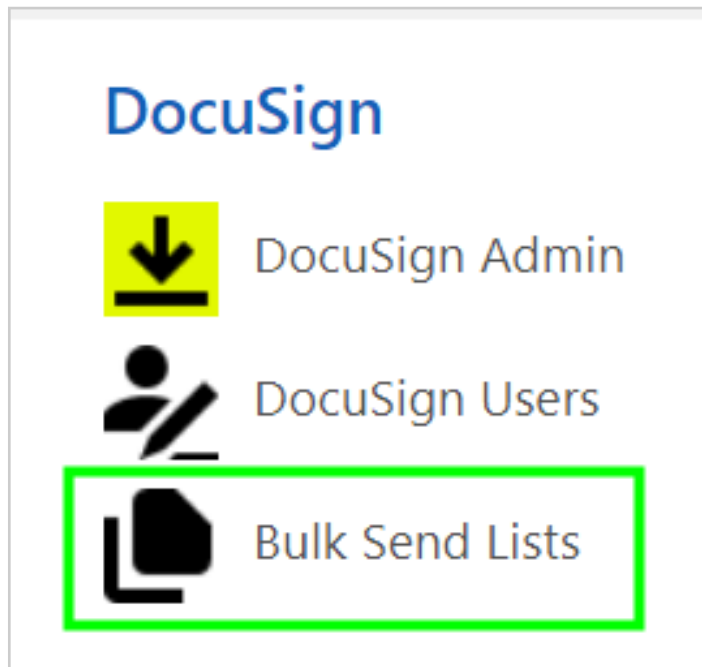
Create a Bulk Send Address List (Admins)

Admins create Bulk Send lists from the **Settings** menu.

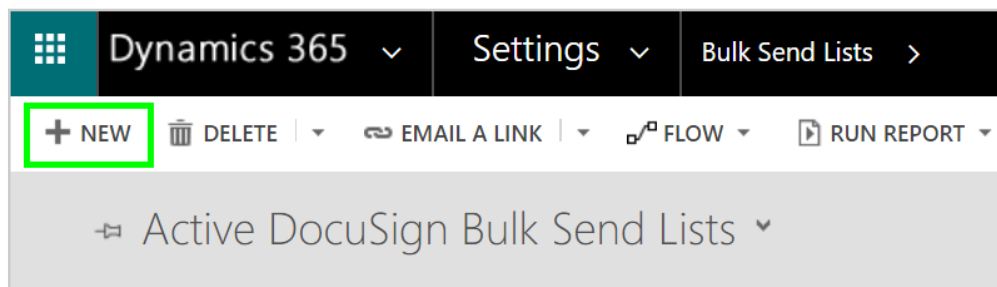
To create a Bulk Send list:

1. Click the down arrow next to Settings in the Admin window

2. Scroll to the right and select **Bulk Send Lists** under the DocuSign section



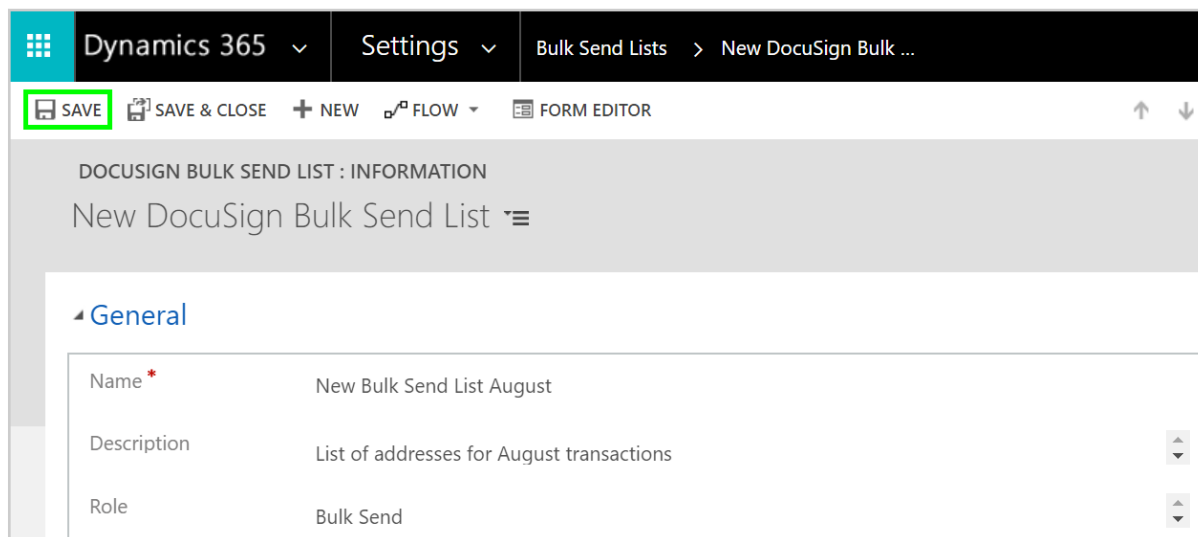
3. In the Bulk Send List dialog, click **New** at the top to create a new list



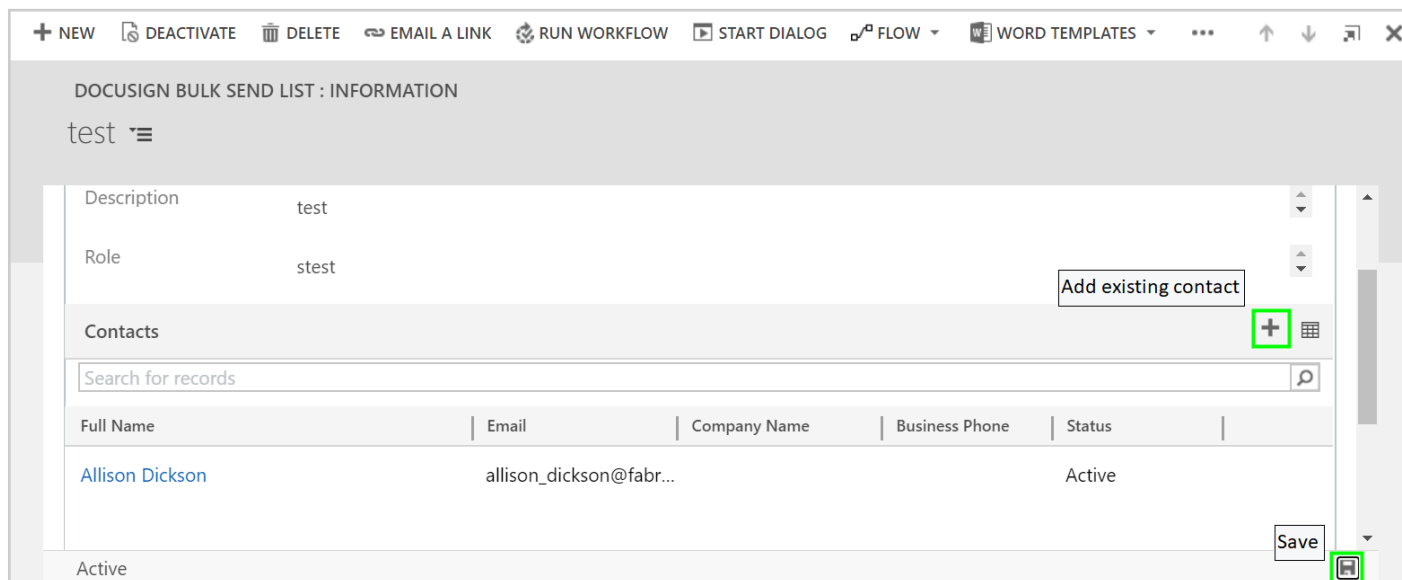
4. Enter a **Name** for the new list and an optional description

5. Enter **Bulk Send** for the **Role** Note: the Role you enter must match the Role in the template you are going to use. For example, if the template has *signers* in the role, then you would enter *signers* here.

6. Click **Save**



7. After saving the new list, click **Add Existing Contact (+)**



8. Enter text in the search box to look for a specific contact, or press Enter to see all contacts

9. Click a contact to add it to the Bulk Send list. You can add up to 1000 contacts to a list.

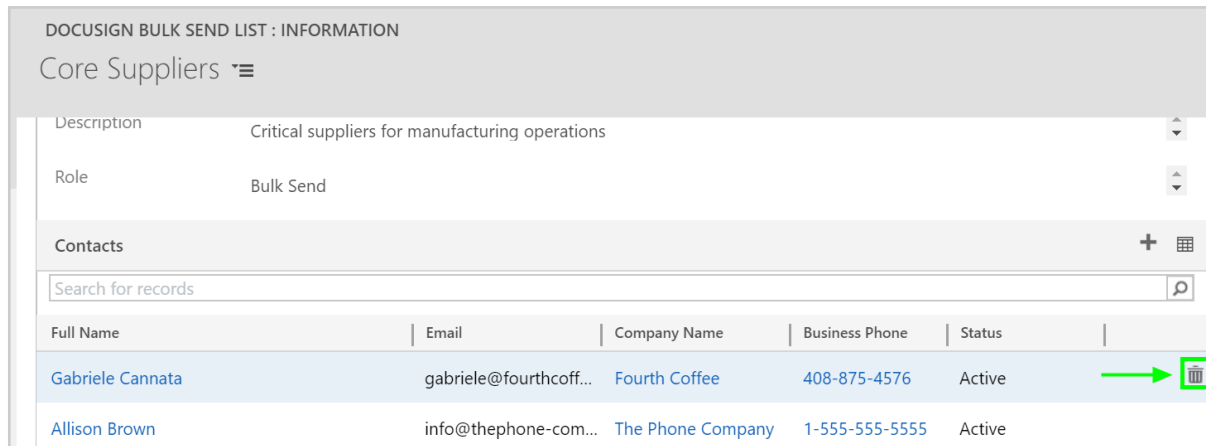
10. When you are done adding contacts, click the **Save** icon at the lower right of the window

Edit a Bulk Send Address List (Admins)

You can add or remove addresses from any Bulk Send list.

To remove an address:

1. Open a Bulk Send address list
2. Select a user
3. Click the trash can that appears at the right



DOCUSIGN BULK SEND LIST : INFORMATION


Core Suppliers

Description: Critical suppliers for manufacturing operations

Role: Bulk Send

Contacts

Search for records

| Full Name | Email | Company Name | Business Phone | Status | |
|------------------|------------------------|-------------------|----------------|--------|---|
| Gabriele Cannata | gabriele@fourthcoff... | Fourth Coffee | 408-875-4576 | Active |  |
| Allison Brown | info@thephone-com... | The Phone Company | 1-555-555-5555 | Active | |

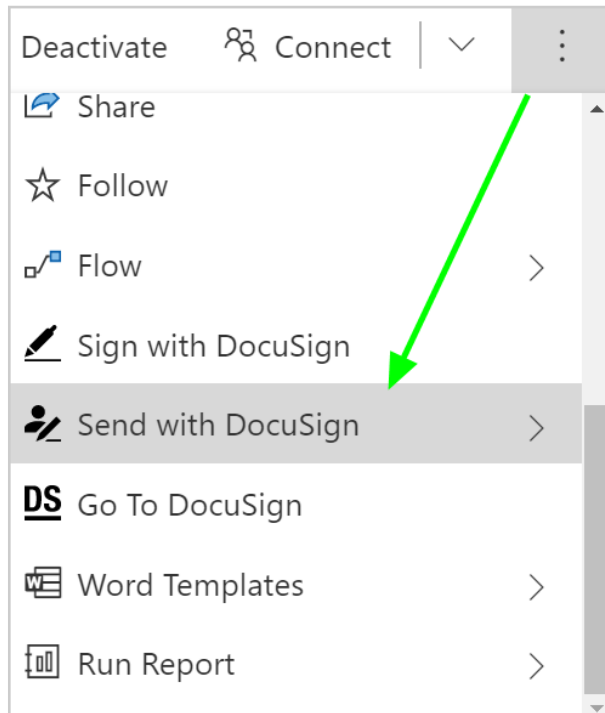
4. Click **Save** when you are done

Create a Bulk Send Address List (Users)

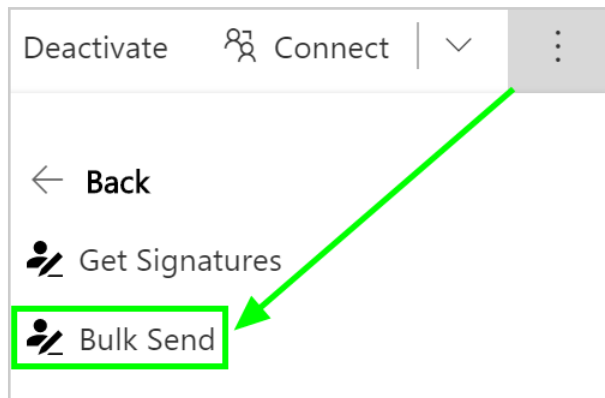
Any DocuSign user can create and modify Bulk Send lists. Creating a list involves selecting contacts from Dynamics CRM and adding them to the list.

To create a Bulk Send list:

1. Open an Entity that has Bulk Send enabled, for example an Account or Contact
2. Click the three vertical dot icon at the upper right
3. Select **Send with DocuSign**



4. In the next menu, select **Bulk Send**



5. In the Lookup Records dialog, click **New DocuSign Bulk Send List**

Lookup Records

Select record

Look for DocuSign Bulk Send List

Type to search or press Enter to browse

+ New DocuSign Bulk Send List

Add Cancel

6. In the New Bulk Send list dialog, enter a **Name** for the new list and an optional description
7. The **Role** should be identical to the the Role in the template you are going to use. For example, if the template has *signers* in the Bulk Send role, then you would enter *signers* here.
8. Click **Save**
9. After saving the new list, click **Add Existing Contact**

New Bulk Send List

DocuSign Bulk Send List

General Related

| | |
|-------------|----------------------|
| Name | * New Bulk Send List |
| Description | New list for testing |
| Role | Bulk Send |

Contacts Add Existing Contact ⋮

10. Use the Search box to find a Contact, or simply press Enter to see a list of all Contacts

Lookup Records

Select record

Recent records [All records](#)

- DeCastro
- Allison Brown
- Bernadette Foley
- Gabriele Cannata
- Eva Elznicova

[+ New Record](#)

Add Cancel

11. You can add up to 1000 Contacts to a Bulk Send list. When you are done adding Contacts, click **Add**

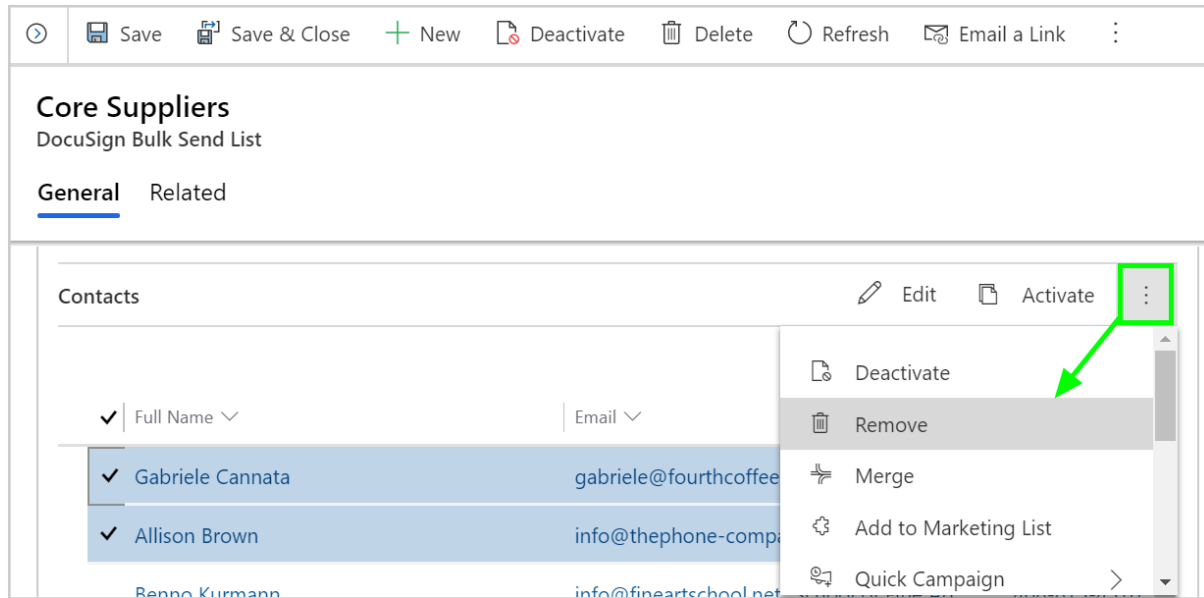
12. Click **Save** when you are done

Edit a Bulk Send Address List (Users)

You can add or remove addresses from any Bulk Send list.

To remove an address:

1. Open a Bulk Send list
2. Select the address to remove by clicking at the left - a check mark should appear



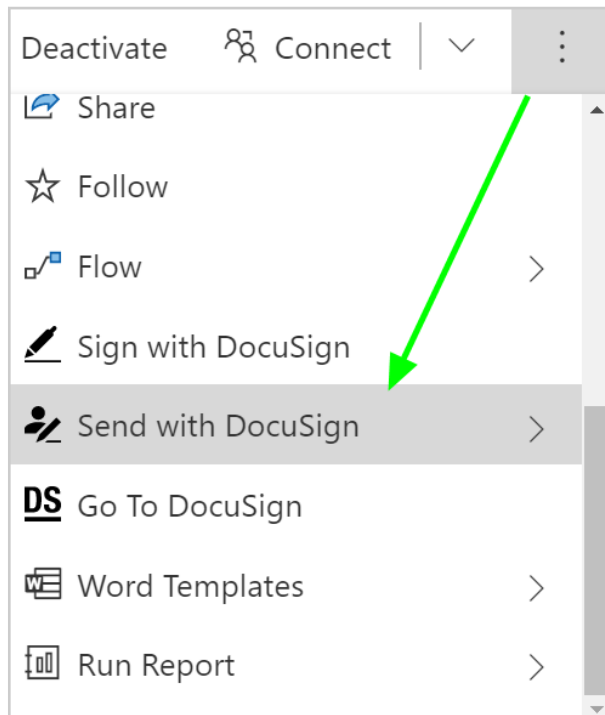
3. Click the three dots and choose **Remove**

4. Click **Save** when you are done

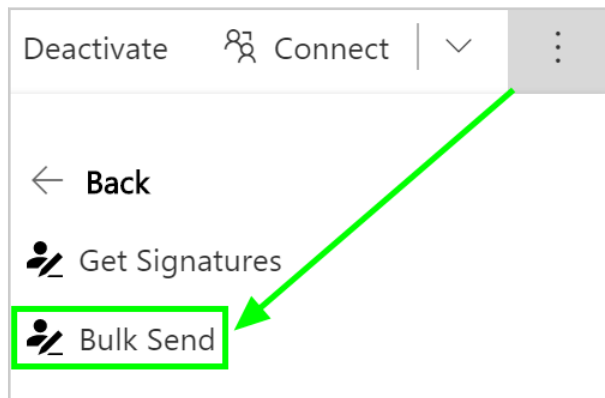
Send an Envelope Using a Bulk Send Address List

1. To send an envelope, select an Entity, for example, a Contact or an Account, for which an Admin has enabled Bulk Send

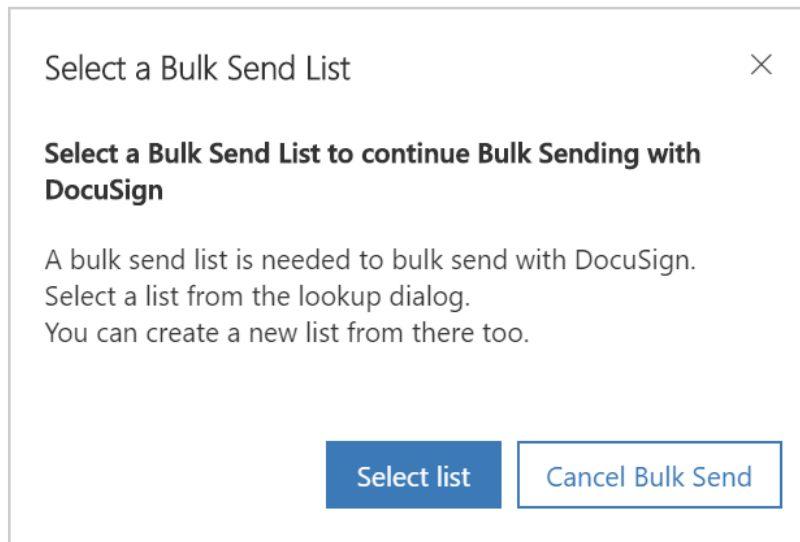
2. Click the three-dot menu at the top right and select **Send with DocuSign**



3. Select **Bulk Send** in the next menu to see Bulk Send lists



4. In the **Select a Bulk Send List** dialog, click **Select List**



5. In the next dialog, search for an existing list, or press Enter to see all existing Bulk Send lists





6. Select a list and click **Add**

Lookup Records ×

Select record

Look for DocuSign Bulk Send List 🔍

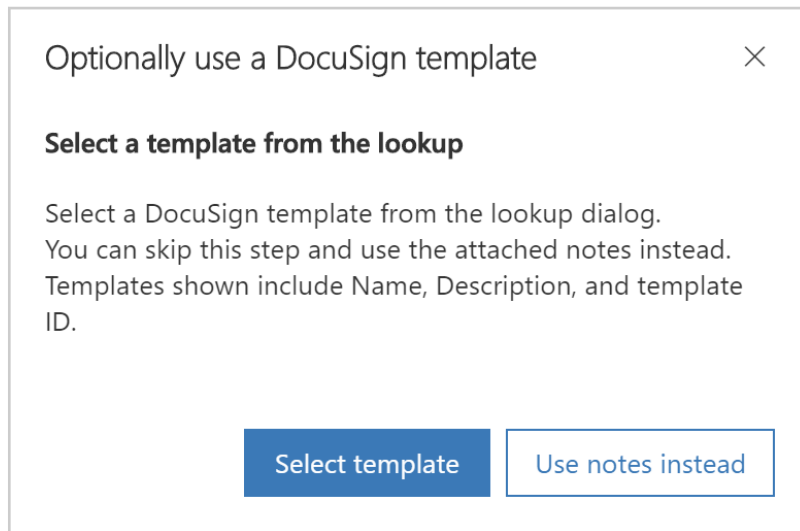
DocuSign Bulk Send Lists

-  Core Suppliers
Critical suppliers for manufacturing operations ∨
-  New Accounts
List for all of the new accounts this FY ∨
-  New Bulk Send List
New list for testing ∨
-  New Bulk Send List August
List of addresses for August transactions ∨

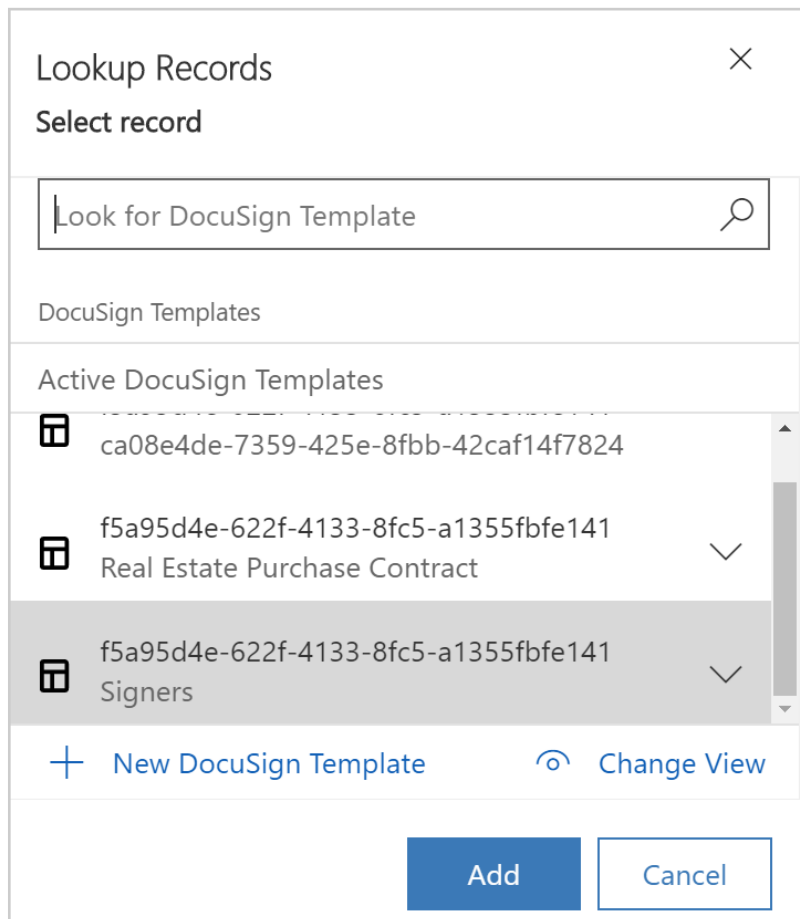
+ [New DocuSign Bulk Send List](#) 🔄 [Change View](#)

[Add](#) [Cancel](#)

7. To use an existing DocuSign template, click **Select Template**



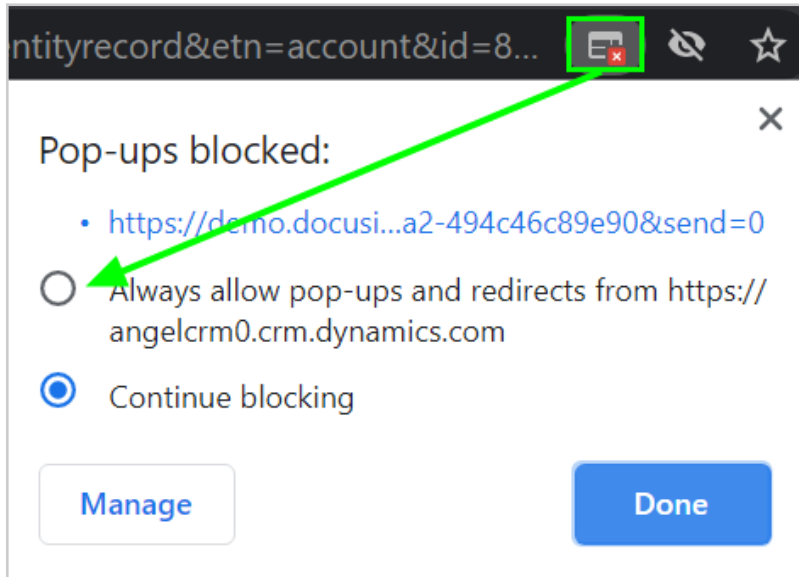
8. Search for an existing template or press Return to see all available templates



9. Select a template and click **Add**

10. Bulk Send will continue in a new window. Click **Send** to open the DocuSign Prepare page

Note: Your browser may prevent the DocuSign pop up window from opening. If this happens, you need to allow pop ups in your browser settings. Below is an example from Chrome:



11. When the DocuSign transaction is complete, the document is saved to the Dynamics record:

The image shows a Microsoft Dynamics 365 contact record for 'DeCastro'. The contact is owned by 'Adam Green'. The 'Summary' tab is selected, showing fields for Job Title (Guard), Account Name (Amalgamated Widgets), and Email (davidaw@dsxtr.com). A list of notes is visible on the right, with one note highlighted by a red box: 'Note modified by Adam Green' with the text 'This is the signed document returned by ...' and a link to 'Please DocuSign Real Estate Purchase Con...'. The note is dated 8/29/2020 12:29 PM.

Integrate SharePoint Files

If you use SharePoint Online and want to access documents in SharePoint from Dynamics, you can do so after you enable SharePoint document management in Dynamics. When enabled, you can send a document saved in SharePoint. Completed documents are saved back to SharePoint. The DocuSign SharePoint integration uses the

default SharePoint site that is configured in Document Management. In addition, SharePoint files are automatically organized by folder and linked to the related Dynamics opportunity, account, etc.

Important: You can only link a single SharePoint folder to a Dynamics record. If a record is linked to more than one SharePoint folder, running a workflow from that record will return an error. See [Troubleshooting](#) for more information.

Requirements to access SharePoint documents from Dynamics:

- Integration is only available with SharePoint Online sites in the same tenant as Dynamics
- Integration must use the default **Get Signatures** action, or any other custom action (does not work with Sign)
- Configure document management in Dynamics with server-based authentication (see [this Microsoft TechNet article](#))

Enable SharePoint file integration

Go to the Dynamics **DocuSign Admin > Settings** page. You will be prompted to allow DocuSign for Dynamics to access your SharePoint sites.

DocuSign[®] ADMIN

HOME ACCOUNT **SETTINGS** ENTITIES

Document Settings

Signed document naming convention

DocuSign document subject + "_signed" ▼

Download signed document as

Combined PDF ▼

Include a Certificate of Completion with signed documents

Save completed documents to SharePoint

DISABLE

Email Settings

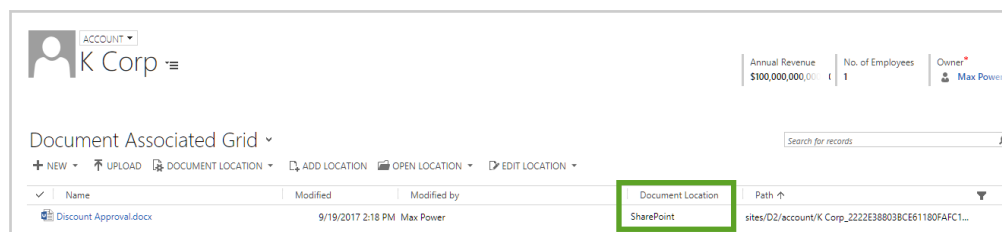
Default Email Subject

Please review and sign your document

Default Email Message

SAVE

The following image shows SharePoint documents within Dynamics.



Customize DocuSign for Dynamics

With DocuSign for Dynamics Workflows, you can add DocuSign custom activities to your Dynamics processes, such as workflows and actions. With these custom steps, you can specify and generate a DocuSign envelope automatically within a Dynamics process for any Dynamics standard or custom entity. These steps can be part of a Dynamics workflow or part of a custom button.

You can define process steps to create the envelope either from the documents and contacts on an object, or using a template from the DocuSign account used with your Dynamics application. You can also define process steps that map DocuSign fields to Dynamics fields to create merge fields that pull Dynamics data into your document

Create Custom Buttons

Custom buttons let you customize the UI and also let you use advanced DocuSign features, including recipient authentication, Standards-Based Signatures, template matching, bulk send, private messages, and many more.

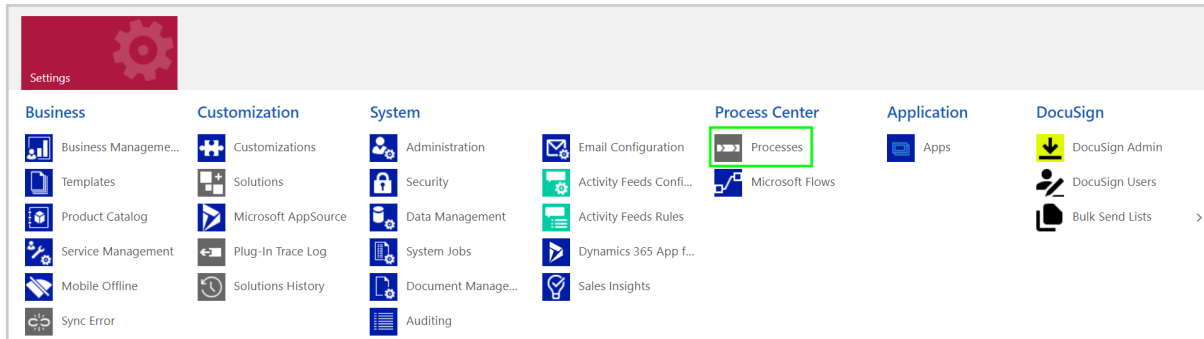
Creating a custom button requires no JavaScript or coding; you use the same workflow components that are already integrated into the Dynamics process framework. You can use any existing components. You can also combine DocuSign actions and built-in Dynamics actions. We've provided a default action, called *Get Signatures*, that pulls attachments from the Dynamics record and creates a draft document and opens it in the Prepare view. This is a global action that works on all entities. Custom buttons that use DocuSign features are populated in the **Send with DocuSign** menu on entities that are enable with DocuSign.

There are two restrictions to creating custom buttons:

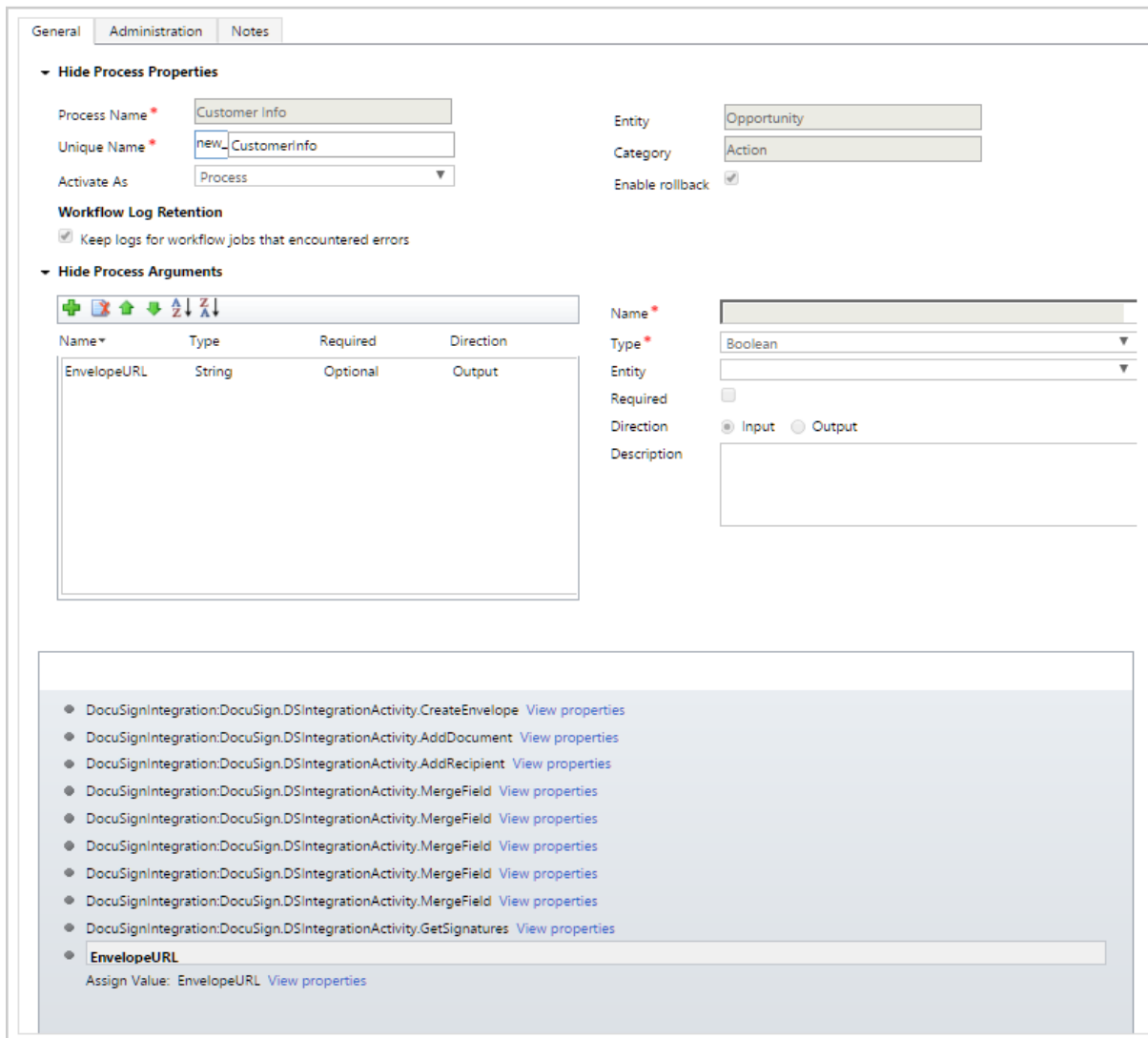
- The default **Get Signatures** action cannot be renamed. All additional custom actions that are added to a record type utilize the name chosen at process creation.
- The action for your custom button must be un-managed with the default namespace prefix of (new_). We are not able to dynamically read the namespace prefix.

Follow these steps to create a custom button:

1. Go to the Dynamics Process Center to create an action for your button.



The following image shows an example of an action called Customer Info, which pulls data from an opportunity and creates a document.



Note: When you create an action for a custom button, you must create an output parameter called **EnvelopeURL** and assign it the URL from the **Get Signatures** or **Get Signing View** steps.

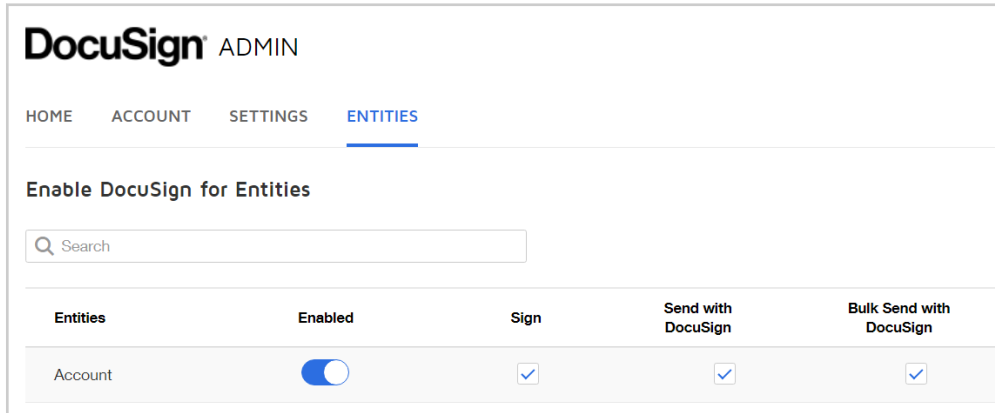
The screenshot shows a 'General' tab in a configuration window. Under 'Assign Value Details', the 'Name' is 'EnvelopeURL' and the 'Value' is '[EnvelopeURL.(DocuSign.DSIntegrationActivity.GetSignatures)]'. The 'Statement Label' is 'EnvelopeURL'. A 'Form Assistant' panel on the right shows 'Dynamic Values' selected and 'Look for: Opportunity'.

In addition, if you create a Global action for a custom button, you must create two String input parameters called **EntityName** and **EntityId** with nothing assigned to them.

The screenshot shows the 'Administration' tab. Under 'Hide Process Properties', 'Process Name' is 'Send with DocuSign Default', 'Unique Name' is 'docusign_SendwithDocuSignDefault', and 'Activate As' is 'Process'. Under 'Workflow Log Retention', the checkbox 'Keep logs for workflow jobs that encountered errors' is checked. Under 'Hide Process Arguments', a table lists parameters:

| Name | Type | Required | Direction |
|-------------|--------|----------|-----------|
| EntityName | String | Required | Input |
| EntityId | String | Required | Input |
| EnvelopeURL | String | Required | Output |

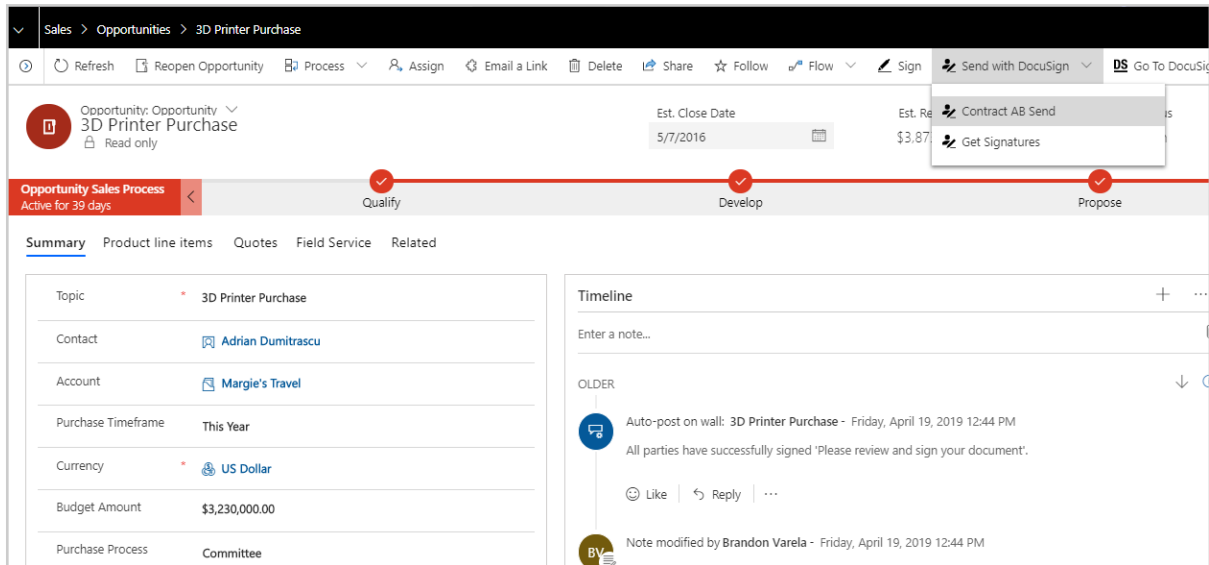
2. After your action is defined and saved, go to DocuSign Admin, and under the Entities tab, check the Send with DocuSign check box. This enables the **Send with DocuSign** sub-menu, which is populated with your new custom action and the default **Get Signatures** action that comes prepackaged with the DocuSign solution.



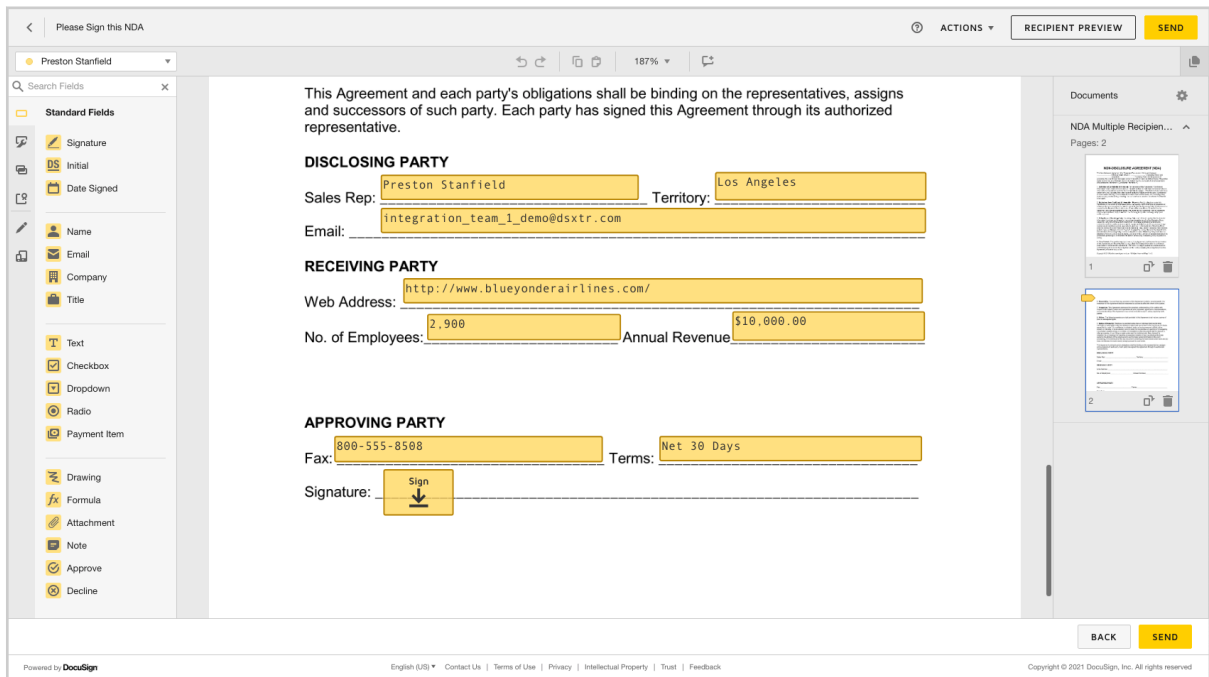
The screenshot shows the DocuSign Admin interface. At the top, there is a navigation bar with 'HOME', 'ACCOUNT', 'SETTINGS', and 'ENTITIES' (which is highlighted). Below the navigation bar, the title 'DocuSign ADMIN' is displayed. Underneath, there is a section titled 'Enable DocuSign for Entities' with a search input field. Below this is a table with the following columns: 'Entities', 'Enabled', 'Sign', 'Send with DocuSign', and 'Bulk Send with DocuSign'. The 'Account' entity is listed in the table with the 'Enabled' toggle turned on and the 'Send with DocuSign' and 'Bulk Send with DocuSign' checkboxes checked.

| Entities | Enabled | Sign | Send with DocuSign | Bulk Send with DocuSign |
|----------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Account | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

3. Open an opportunity, and then, under the command bar, open the **Send with DocuSign** sub-menu and click **Customer Info**.



The document opens in the DocuSign Add Fields page with information from the opportunity already applied to the document with the Customer Info action.



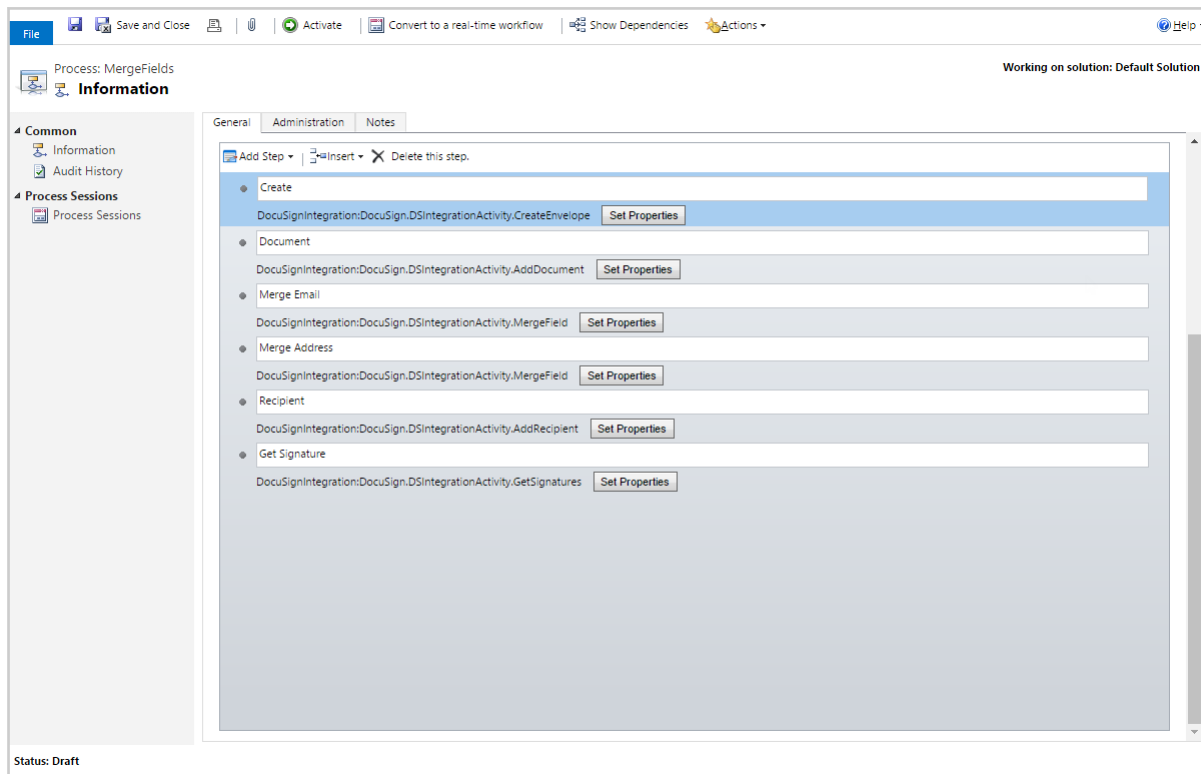
DocuSign Custom Activities

DocuSign Custom Activities

DocuSign for Dynamics Workflows consists of nine custom activities that are used to create a DocuSign transaction:

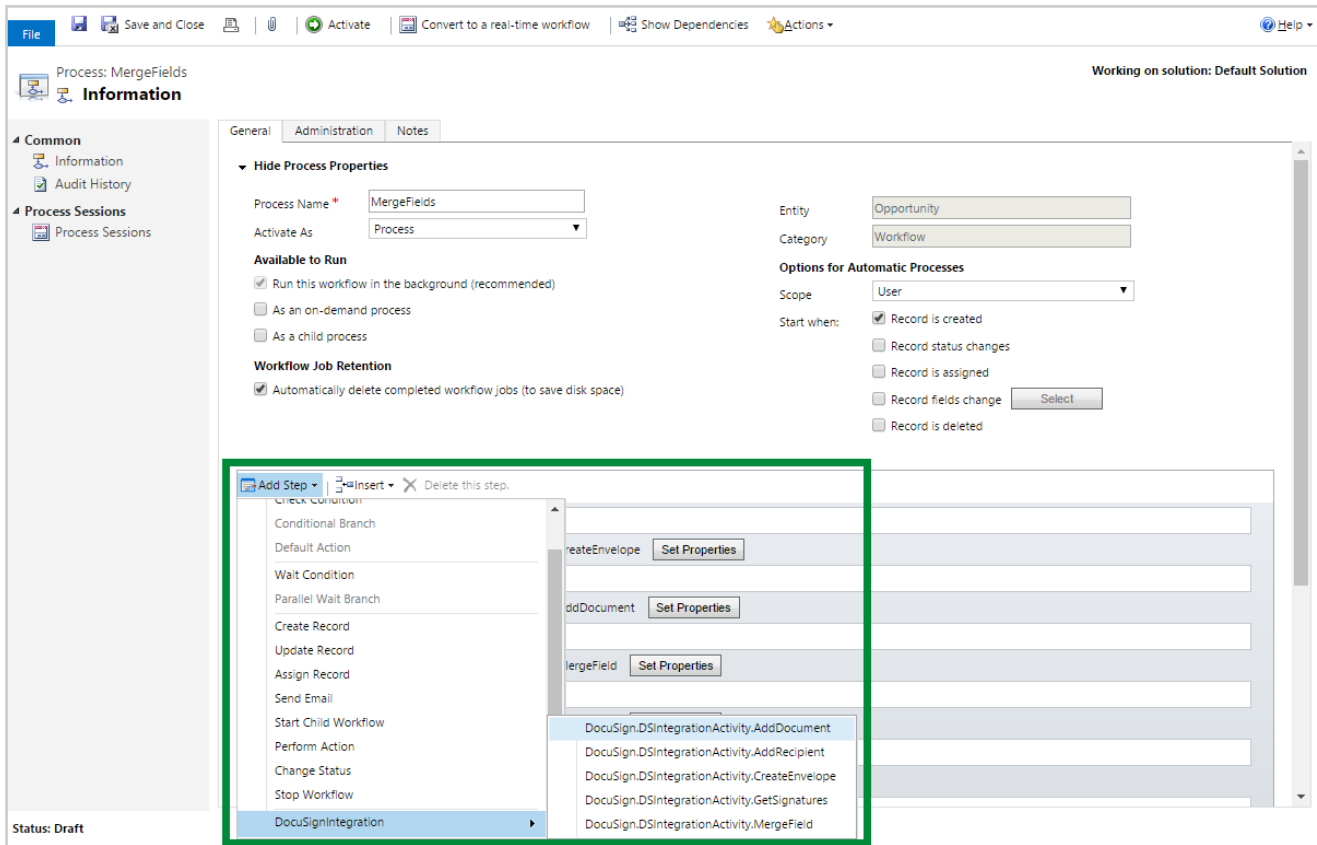
- **Create Envelope** - This is the first step in creating a DocuSign transaction. You can also create an envelope from a template by specifying a template ID.
- **Add Recipient** - Use this activity to add recipients to the DocuSign envelope. You can also use it to match recipients to template roles.
- **Add InPerson Signer** - Use this activity to add in-person signers to the DocuSign envelope. You can also use it to match recipients to template roles. The InPerson Signer will not receive an email notification from DocuSign to sign the envelope.
- **Add Document** - Use this activity to add documents to the DocuSign envelope. Documents must be saved in the Notes of the record, or SharePoint, if enabled, on which the custom activity is operating.
- **Get Signatures** - This activity is the final step in creating and sending a DocuSign transaction. You can send immediately, or choose to output the URL for the Add Fields view and not send the document. You can also choose which view opens: Add Fields or Prepare.
- **Get Signing View** - This activity generates a signing URL for use in an in-person signing session.
- **Merge Field** - Use this activity to map DocuSign fields on a document or template to Dynamics fields.
- **Merge Multiple Fields** - Use this activity to map up to 25 DocuSign fields on a document or template to Dynamics fields. This activity saves processing time over using the singular merge field action multiple times.
- **Get Field Value** - Use this activity to access data from completed documents.

Here is an example of configuring five of the custom activities as part of a Dynamics workflow:



Add Custom Activities to Process Steps

To include a DocuSign transaction as part of a Dynamics process, you add the custom activities as steps and define their properties. The custom activities are listed in the **Add Step** menu, under the **DocuSignIntegration** selection:



Following are descriptions of the properties of a **DocuSignIntegrationActivity** step:

CreateEnvelope


This is always the first step in creating a DocuSign transaction. The properties are all optional.

| Property Name | Data Type | Required | Value |
|---------------|---------------------|----------|-----------------------------------|
| Subject | Single Line of Text | Optional | <input type="text"/> |
| Message | Single Line of Text | Optional | <input type="text"/> |
| TemplateId | Single Line of Text | Optional | E22B3E76-B4C9-4BD2-8265-37841CA6A |

- **Subject:** Specifies a unique Subject line for the envelope. Otherwise, the value specified in the DocuSign Admin is used.
- **Message:** Specifies a unique Message. Otherwise, the value specified in the DocuSign Admin is used.
- **TemplateId:** Specifies an existing template from which to create the envelope. Copy and paste the template ID from the DocuSign sending account.

Add Document

When included, to support the use of AutoPlace, this should be the second step in the DocuSign process (it *must* come before any Add Recipients steps). Add one Add Document step for each specific document that you want to add to the envelope. Documents are included in the envelope in the order in which you add the Add Document step. Add Document pulls files in Notes and SharePoint (if enabled). All documents are treated as a combined set before the following filters are applied. This step is optional because you can use a template in the Create Envelope step, or you can add documents manually in the DocuSign Add Fields view. You cannot use merge fields, however, when you add a document manually.


 Process: Approval Workflow
Set Custom Step Input Properties

| Property Name | Data Type | Required | Value |
|---------------|---------------------|----------|---|
| Envelope | Single Line of Text | Required | <input style="width: 100%;" type="text"/> |
| Filename | Single Line of Text | Optional | <input style="width: 100%;" type="text"/> |
| Most Recent | Two Options | Optional | <input checked="" type="radio"/> False <input type="radio"/> True |

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Filename:** Enter a complete file name to add a specific file, or search for a filename using * as a wild card. The file name is case insensitive. You can leave this field blank to include everything in Notes and SharePoint (if enabled) for the object. (Optional)
- **Most Recent:** Specifies whether to add the most recent file. If you specify a file in Filename, and there are multiple versions, you can attach all versions (False) or just the latest version (True). If Filename is blank, you can add all files on the object (False) or just the latest file (True). (Optional)

Merge Field/Merge Multiple Fields

Map labeled DocuSign fields to Dynamics sources to automatically fill the DocuSign fields with Dynamics data. Add one merge field for each DocuSign field you want to fill. This step is optional if you are not mapping any DocuSign fields to Dynamics sources. Merge Multiple Fields works in an identical manner, but allows up to 25 merge actions per recipient instead of one.

Process: MergeFields
 **Set Custom Step Input Properties**


| Property Name | Data Type | Required | Value |
|---------------|---------------------|----------|----------------------|
| Envelope | Single Line of Text | Required | <input type="text"/> |
| Recipient Id | Single Line of Text | Required | <input type="text"/> |
| Tag Label | Single Line of Text | Required | <input type="text"/> |
| Value | Single Line of Text | Required | <input type="text"/> |

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Recipient ID:** This is an output parameter from the Add Recipient activity. (Required)
- **Tag Label:** The DocuSign field label to map to a Dynamics source. The label must be defined in DocuSign before it can be mapped. (Required)
- **Value:** The Dynamics source mapped to the DocuSign label. Data from this source is pushed into the document. (Required)

Add Recipient

Add recipients to the envelope and match recipients to template roles.

Note: Recipients are added as Needs to Sign by default. If you need to assign a different recipient action to someone (for example, Needs to View), then you must use a template and have the template role specify the action.

Process: Approval Workflow
 **Set Custom Step Input Properties**

| Property Name | Data Type | Required | Value |
|---------------|---------------------|----------|----------------------|
| Envelope | Single Line of Text | Required | <input type="text"/> |
| Name | Single Line of Text | Required | <input type="text"/> |
| Email | Single Line of Text | Required | <input type="text"/> |
| Role | Single Line of Text | Optional | <input type="text"/> |
| RoutingOrder | Whole Number | Optional | <input type="text"/> |


- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Name:** Specifies the recipient's name. (Required)

- **Email:** Specifies the recipient's email address. (Required)
- **Role:** Specifies the template role to map to the recipient. (Optional)
- **RoutingOrder:** Specifies where in the signing order to add the recipient. RoutingOrder is not required for envelopes that use a template. (Optional)

Add InPerson Signer

This activity creates an in-person signer.

File


Process: Work Authorization - In Person

Set Custom Step Input Properties

| Property Name | Data Type | Required | Value |
|---------------|---------------------|----------|--------------------------------|
| Envelope | Single Line of Text | Required | <input type="text"/> |
| Host Name | Single Line of Text | Required | <input type="text"/> |
| Host Email | Single Line of Text | Required | <input type="text"/> |
| Signer Name | Single Line of Text | Required | <input type="text"/> |
| Role | Single Line of Text | Optional | <input type="text"/> |
| RoutingOrder | Whole Number | Optional | <input type="text" value="1"/> |

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Host Name:** Specifies the in-person host's name. (Required)
- **Host Email:** Specifies the in-person host's email address. (Required)
- **Signer Name:** Specifies the in-person signer's name. (Required)
- **Role:** Specifies the template role to map to the recipient. (Optional)
- **RoutingOrder:** Specifies where in the signing order to add the recipient. RoutingOrder is not required for envelopes that use a template. (Optional)

Get Signatures

This activity is the final step in creating and sending a DocuSign envelope. You can send the envelope immediately or choose to output the URL for the Add Fields view.

Process: Test One Click Options

Set Custom Step Input Properties

| Property Name | Data Type | Required | Value |
|-------------------|---------------------|----------|--|
| Envelope | Single Line of Text | Required | <input type="text"/> |
| One Click Send | Two Options | Required | <input checked="" type="radio"/> False <input type="radio"/> True |
| One Click Options | Option Set | Optional | <input type="text" value="Tag"/> <ul style="list-style-type: none"> Tag Tag Prepare |

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **One Click Send:** Specifies whether to send the envelope immediately. (True) sends the envelope immediately. (False) outputs the URL of the Add Fields view for the envelope, without sending. You can use this URL to program additional actions on the envelope.
- **One Click Options:** Specifies whether to open the DocuSign Add Fields view (Tag) or the Prepare view when getting signatures.

Get Signing View

Generates the in-person signing session URL for input into the Assign URL action.

Note: This activity only available following the Add InPerson Signer activity, and only with a sent envelope.

File

Process: Work Authorization - In Person


Set Custom Step Input Properties

| Property Name | Data Type | Required | Value |
|---------------|---------------------|----------|----------------------|
| Envelope | Single Line of Text | Required | <input type="text"/> |
| RecipientId | Single Line of Text | Required | <input type="text"/> |

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **RecipientID:** Specifies the in-person signer. This is the output of the Add InPerson Signer activity. (Required)

Get Field Value

Access data from a completed document to update fields in Dynamics or to trigger additional workflows.



Process: Update Opportunity Merge Field

Set Custom Step Input Properties

| Property Name | Data Type | Required | Value |
|---------------|---------------------|----------|----------------------|
| Envelope | Single Line of Text | Required | <input type="text"/> |
| Tag Label | Single Line of Text | Required | <input type="text"/> |

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Tag Label:** The DocuSign field label to map to a Dynamics source. The label must be defined in DocuSign before it can be mapped. It must also be unique across all recipients (two recipients cannot have the same tag label). (Required)

The output of the Tag Label is the field value from the DocuSign envelope. It can be formatted as one of: Boolean, Date/Time, Decimal, Double, Integer, Money, or Text.

Merge Fields: Dynamics to DocuSign

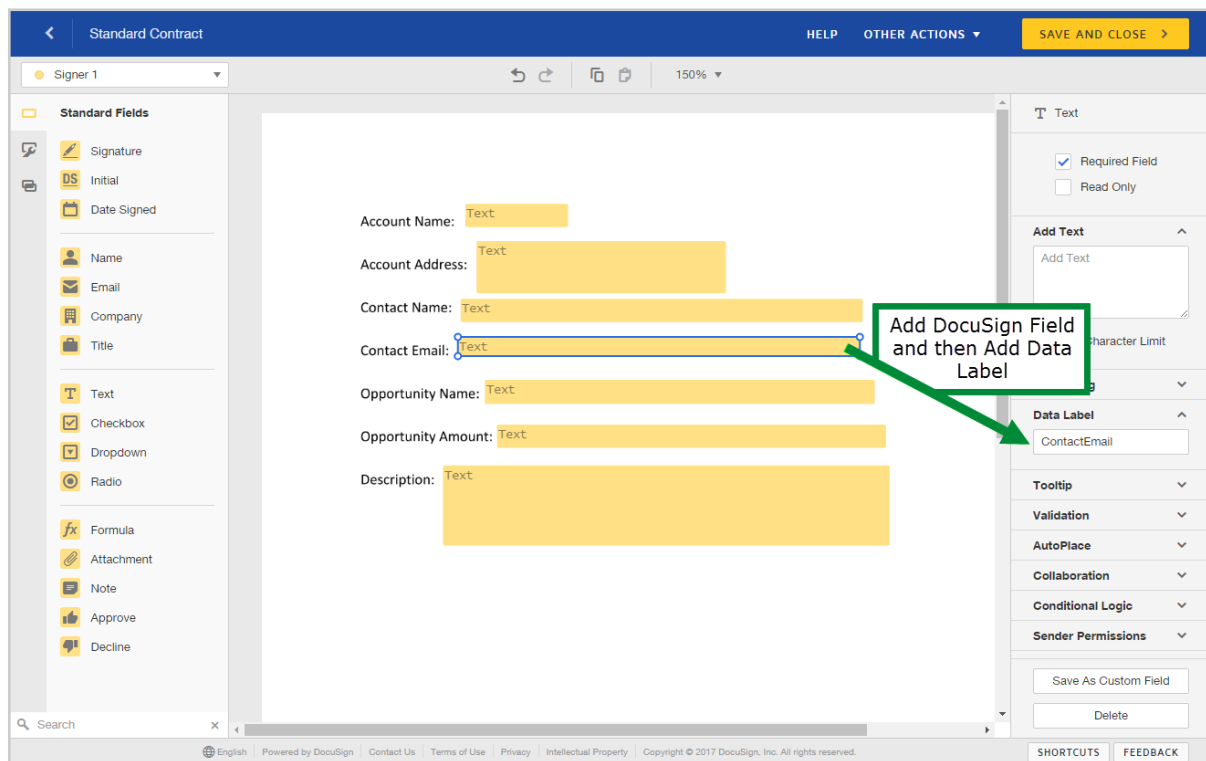
Merge Fields link data to automatically populate information from Dynamics to a DocuSign agreement.

To merge field data from Dynamics to DocuSign:

1. In DocuSign, start by [Creating a Template](#). When you add signing fields, add a Data Label for each field. Data labels are used to map the DocuSign signing fields to a corresponding Dynamics field when merging data between Dynamics and DocuSign.

Note:

- Merge Fields support all DocuSign field types except radio buttons and drop-down lists.
- Merge Fields do not support one-to-many relationships, such as merging multiple products related to an Opportunity.
- To use Payments with merge fields, set up the payment as a formula field and reference a number field into which you merge data.



2. Configure a custom process in Dynamics.

- a) Go to **Settings > Processes > New**
- b) Add a process name.
- c) Select Action for the **Category**
- d) Select the Dynamics entity where your custom process will appear in the DocuSign menu.

Important:

Your custom process will be automatically prepended with **new_**. Do not modify this otherwise the DocuSign connector will not detect your custom process.

3. Create three process arguments

| Name | Type | Required? | Direction |
|-------------|-------------|------------------|------------------|
| EnvelopeURL | String | Not Required | Output |
| EntityName | String | Required | Input |
| EntityID | String | Required | Input |

4. Add process steps. Custom processes will differ based on use case and specific settings. The example below describes how to merge data from Dynamics to a DocuSign template.

a) **CreateEnvelope**

1. **Add Step > DocuSignIntegration > DocuSign.DSIntegrationActivity.CreateEnvelope**
2. Add a description
3. Click **Set Properties**
4. (Optional) Add an email subject and message
5. Copy and paste the Template ID from DocuSign. The Template ID can be found in **docusign.net > Templates > [Template Name]**
6. Select **Template ID** in top left corner and copy it.

b) **AddRecipient**

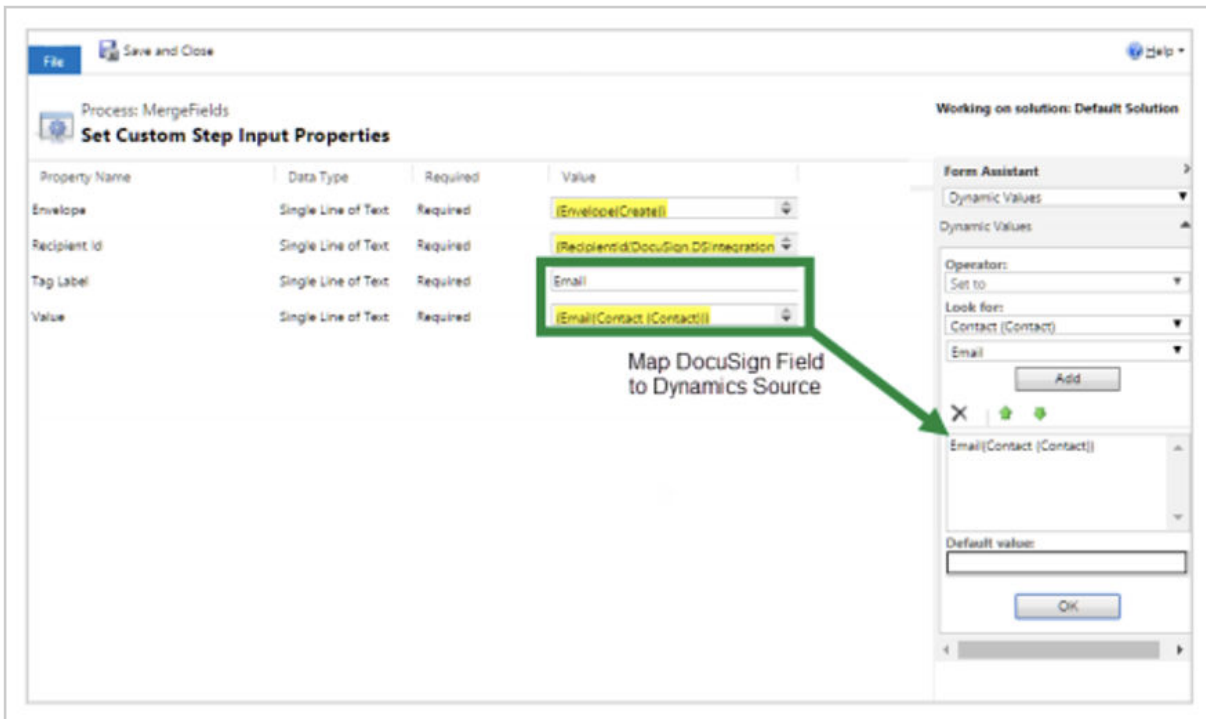
1. **Add Step > DocuSignIntegration > DocuSign.DSIntegrationActivity.AddRecipient**
2. Add a description
3. Click **Set Properties**
4. For **Envelope**, select the output of the **CreateEnvelope** step. Look for **Local Values > [the description you added in step ii of the Create Envelope step]**
5. For **Name** and **Email**, hard-code a recipient or you can choose to dynamically populate from Dynamics. For example, you can populate with the primary contact on the Dynamics record.
6. For **Role**, hard-code with the DocuSign role from the Template
7. (Optional) **RoutingOrder**: specify the order of signing for this recipient

c) **MergeField**

1. **Add Step > DocuSignIntegration > DocuSign.DSIntegrationActivity.MergeField.**

Note: If you need to merge more than one field, select **DocuSign.DSIntegrationActivity.MergeMultipleField**

2. Add a description
3. Click **Set Properties**
4. For **Envelope**, select the output of the **CreateEnvelope** step. **Look for > Local Values > [the description you added in step ii of the Create Envelope step]**
5. For **Recipient Id**, select the output of the **AddRecipient** step for the corresponding recipient. Go to **Look For > Local Values > [the description you added in step ii of the AddRecipient step]**.
6. **Tag Label**: Data label of the signing field in the DocuSign template
7. **Value**: the Dynamics field you want to link. Select the field using the **Look for** menu on the right.



d) GetSignatures

1. **Add Step > DocuSignIntegration > DocuSign.DSIntegrationActivity.GetSignatures**
2. Add a description
3. Click **Set Properties**
4. For **Envelope**, select the output of the CreateEnvelope step. Look for **Local Values**[the description you added in step ii of the Create Envelope step].
5. (Optional) **One Click send**, when True, will skip the **Prepare** and **Add Fields** steps in DocuSign.
6. (Optional) **One Click Options** allows you to select the landing page when entering DocuSign from Dynamics

e) EnvelopeURL

1. **Add Step > Assign Value**
2. Add description
3. Click **Set Properties**
4. For **Value**, select the output of the GetSignatures step. Go to **Look for > Local Values > [the description you added in step ii of the GetSignatures step]**.
5. Save your custom process and click **Activate**.
6. Navigate to the Dynamics record. Click **Send with DocuSign > [your custom process]**.

Merge Fields: DocuSign to Dynamics

You can also use Merge Fields to update records in Dynamics when a DocuSign envelope is completed. Follow these steps:

1. Create a workflow on the DocuSign Transaction entity. This workflow should run when **Envelope Status** changes.
2. Use the **Check Condition** action to see whether the **Envelope Status** is completed (you can see all status codes here.)
3. Add a condition for the specific entity, if needed (e.g., opportunity lookup contains data). **Scope = Organization**
4. Use the **Get Field Value** activity to get the value of the field. NOTE: The tag label must be unique across all recipients in the envelope.
5. Use **Update Record** to update the record with the value from **Get Field Value**.
 - The associated record is the relevant lookup, depending on the entity.
 - Use the appropriate output value based on the data type needed.

AutoPlace Fields in Custom Buttons

DocuSign for Dynamics supports standard AutoPlace functionality. AutoPlace can only be used in workflows and custom buttons.

AutoPlace allows text to be used in documents as a placeholder for signature, initial, or other fields for recipients. You manually place the text into your documents where you want each recipient to take some action. When you send the document using DocuSign, the appropriate DocuSign fields are placed in the AutoPlace locations.

Here's how AutoPlace works:

1. Create a custom field with the AutoPlace text . The AutoPlace text must end with {r}; for example, the AutoPlace text for a signature placeholder is \s{r}\.

Note: You can only use AutoPlace on shared custom fields.

Name

Sign me

Relate to Salesforce

First, create a [Salesforce connect configuration](#) then return here.

Type

Sign Here ▼

Shared

Advanced

Tooltip

AutoPlace Text

\s{r}\

The following table shows the AutoPlace text to use in custom fields for different field types.

| Field Type | AutoPlace Text |
|------------------|----------------|
| Signature | \s{r}\ |
| Initial | \i{r}\ |
| Optional Initial | \oi{r}\ |
| Name | \n{r}\ |
| Company | \co{r}\ |
| Title | \t{r}\ |
| Date Signed | \d{r}\ |

2. Create an envelope using workflows or a custom button.
3. Add recipients to the envelope with the **Add Recipient** activity. Each recipient you add is assigned an ID. The first recipient you add is assigned 1, the second is assigned 2, and so on. This is the order in which you add recipients with **Add Recipient**, not the signing order.
4. Enter the AutoPlace text in the document with the recipient ID in place of {r}.

For example:

- To add a Signature tag for the second recipient, enter \s2\ in the document.
 - To add a Company tag for the third recipient, enter \co3\ in the document.
 - To add a Title tag for the first recipient, enter \t1\ in the document.
5. After entering the AutoPlace text, change the color of the AutoPlace text to white or to the background color of the document. This makes the AutoPlace text invisible to document recipients.

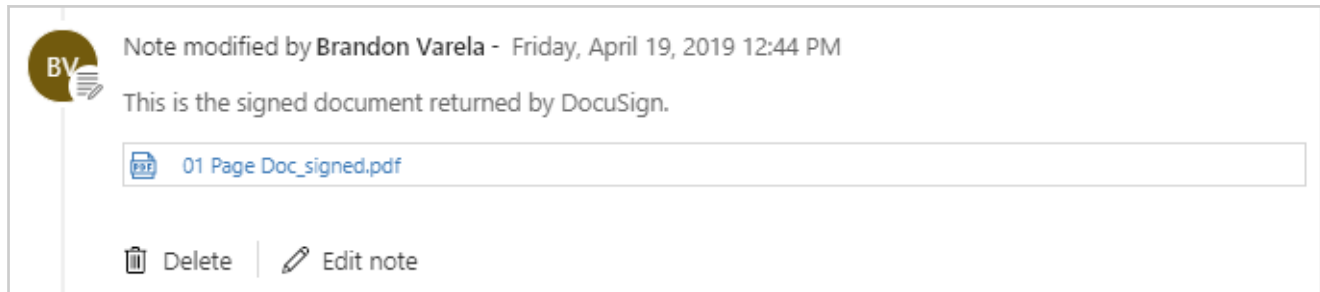
Important: DocuSign adds the fields to each text location where that AutoPlace text appears.

Track Agreement Status

You can track the status of an agreement by selecting the DocuSign Transactions menu. Click **Related > DocuSign Transactions**. A table will display the agreement data, including the Envelope Status. If the status is not updating after an envelope is completed, you can manually refresh the status manually. See [Manually Update Envelope Statuses](#).


The screenshot shows the Microsoft Dynamics 365 interface for an opportunity named '3D Printer Purchase'. The breadcrumb navigation is 'Sales > Opportunities > 3D Printer Purchase'. The top navigation bar includes options like Refresh, Reopen Opportunity, Process, Assign, Email a Link, Delete, Share, Follow, and Flow. The opportunity details include 'Opportunity: Opportunity', '3D Printer Purchase', 'Read only', and 'Est. Close Date: 5/7/2016'. The 'Opportunity Sales Process' is shown as 'Active for 34 days' with stages 'Qualify' and 'Develop'. The 'Related' section is open, showing a list of related items: Activities, Connections, Audit History, Documents, Playbooks, Opportunity Project Price Lists, and DocuSign Transactions (highlighted). Below this, there are sections for 'Related - Field Service' and 'Work Orders'. The main content area shows a table with fields like Topic, Contact (Adrian Dumitrascu), Account (Margie's Travel), Purchase Timeframe (This Year), Currency (US Dollar), Budget Amount (\$3,230,000.00), Purchase Process (Committee), and Description (3D Printer Purchase). The 'Current Situation' is shown as '---' and 'Customer Need' is also visible.



When all recipients have completed their actions, the signed document is stored as a PDF attachment in the Notes section, or in SharePoint if you have enabled the SharePoint integration.



Note modified by **Brandon Varela** - Friday, April 19, 2019 12:44 PM

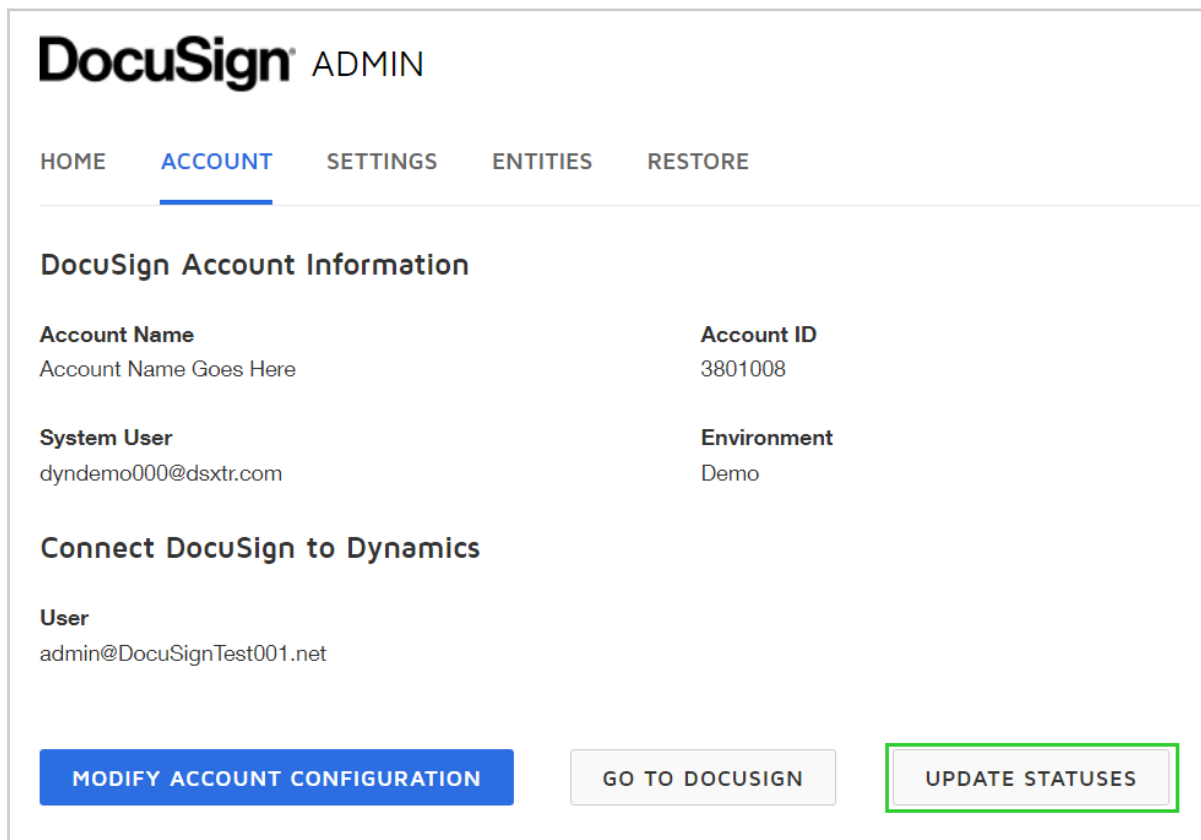
This is the signed document returned by DocuSign.

 01 Page Doc_signed.pdf

 Delete |  Edit note

Manually Update Envelope Statuses

Normally, updates to the status of envelopes sent through DocuSign for Dynamics are automatically posted to Dynamics when a change occurs. There might be times when an update is missed or fails because of connection issues or other problems. As a backup to the normal post function, **Update Statuses** will check all envelopes sent in the past three days and update the envelope status.



DocuSign ADMIN

HOME **ACCOUNT** SETTINGS ENTITIES RESTORE

DocuSign Account Information

| | |
|---|------------------------------|
| Account Name Account Name Goes Here | Account ID 3801008 |
| System User dyndemo000@dsxtr.com | Environment Demo |

Connect DocuSign to Dynamics

User
admin@DocuSignTest001.net

MODIFY ACCOUNT CONFIGURATION **GO TO DOCUSIGN** **UPDATE STATUSES**

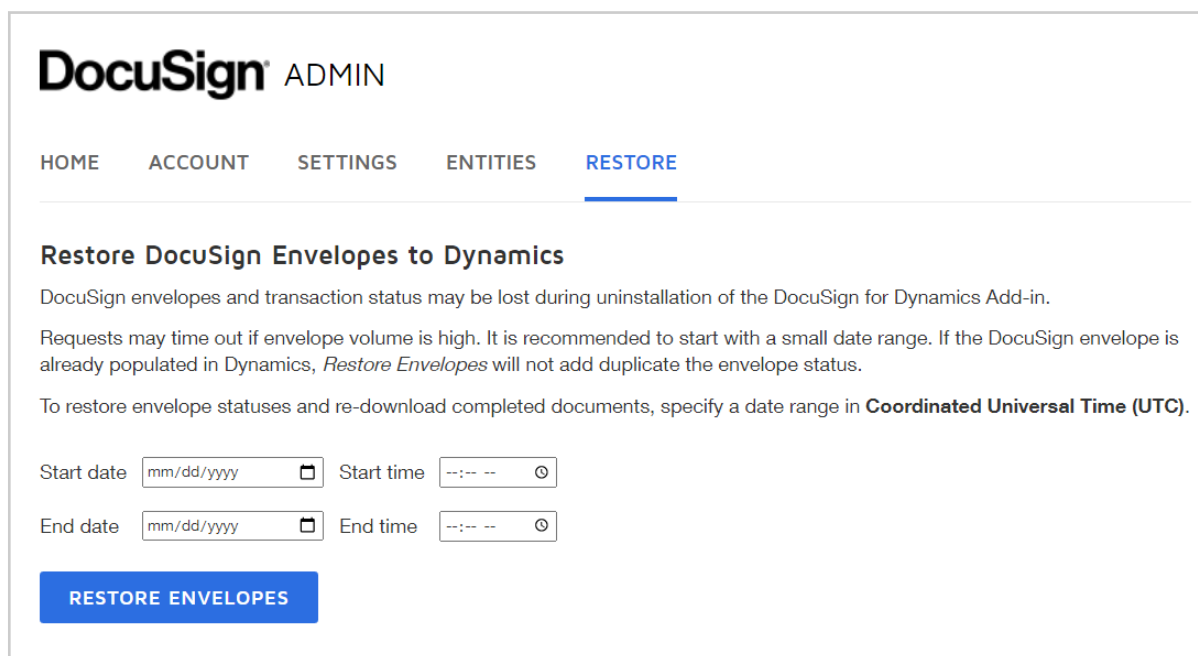
When you click **Update Statuses**, all DocuSign envelopes will be updated to the latest status. If an envelope status changed to **Completed**, a copy of the completed documents will be posted to the record.

Restore Envelopes

In rare cases, DocuSign transaction statuses and copies of completed documents may fail to write back to Dynamics due to network issues or other episodic interruptions. Additionally, if DocuSign for Dynamics is uninstalled all transaction statuses are lost.

Restore Envelopes enables the recovery of all DocuSign documents and will update the transaction statuses in each Dynamics record. DocuSign will not duplicate any documents that are already present in Dynamics.

1. Select the Restore tab in the main account window.
2. Click **Restore Envelopes**



The screenshot shows the DocuSign ADMIN interface. At the top, there is a navigation bar with the following tabs: HOME, ACCOUNT, SETTINGS, ENTITIES, and RESTORE. The RESTORE tab is currently selected and highlighted with a blue underline. Below the navigation bar, the main heading is "Restore DocuSign Envelopes to Dynamics". Underneath this heading, there is a paragraph of text: "DocuSign envelopes and transaction status may be lost during uninstallation of the DocuSign for Dynamics Add-in. Requests may time out if envelope volume is high. It is recommended to start with a small date range. If the DocuSign envelope is already populated in Dynamics, *Restore Envelopes* will not add duplicate the envelope status." Below this text, there is another paragraph: "To restore envelope statuses and re-download completed documents, specify a date range in **Coordinated Universal Time (UTC)**." There are four input fields: "Start date" with a placeholder "mm/dd/yyyy" and a calendar icon, "Start time" with a placeholder "--:-- --" and a clock icon, "End date" with a placeholder "mm/dd/yyyy" and a calendar icon, and "End time" with a placeholder "--:-- --" and a clock icon. At the bottom of the form, there is a blue button labeled "RESTORE ENVELOPES".

Enable Plug-in Trace Logs for Client-side Debugging

The DocuSign for Dynamics connector is split into two parts: a client-side package installed via Microsoft AppSource, and a server-side component hosted by DocuSign. DocuSign can capture logs for server events, but you must enable plug-in trace logs to debug client-side issues.

To enable plug-in trace logs:

1. Go to **Settings > Administration > System Settings > Customization > Plug-in and custom workflow activity tracing**
2. Select **Enable logging to plug-in trace log**.
3. Repeat the action that is causing the problem (e.g. Get Signatures, run a workflow).

4. Open **Advanced Find** from the funnel icon at the right side of the ribbon.
5. Capture the plug-in trace logs using the DocuSign Diagnostic Query and the DocuSign Workflow Diagnostic Query.
6. Select **Results** to view the logs.
7. Download the logs to Microsoft Excel for further analysis.

Note:

- You can disable logs at any time
- Microsoft Dynamics deletes logs after 24 hours have elapsed.

Troubleshooting

Troubleshooting Issues for DocuSign for Dynamics.

Error: Request not supported:

Error: Request not supported: new_{CustomWorkflowName}

1. Check the **publisher prefix**. DocuSign uses the default publisher prefix **new_** or the unique prefix **docusign_**. If you have created a custom action with a different **publisher prefix**, an error occurs.
2. To check the publisher prefix, go to **Settings > Customizations > Publishers**. If you have changed the default publisher prefix assigned to a DocuSign process, you need to rename it to **new_**.
3. If this solution is unavailable, an alternative is to create an unmanaged solution that will hold all custom actions for DocuSign and assign it to a publisher with the prefix **new_**.

If you have any questions or need more assistance, please contact [DocuSign support](#).

Error: An unexpected error occurred from ISV code

Error: An unexpected error occurred from ISV code. (ErrorType = ClientError) Unexpected exception from plug-in (Execute): DocuSign.DSIntegrationActivity.GetSignatures: System.Exception: Object reference not set to an instance of an object.

1. Expanding the error results in **Error creating SharePoint folder for /Entity_Name, Error creating SharePoint folder for /Entity_Name**.
2. This occurs when running a workflow from a record linked to multiple SharePoint folders.
3. The solution is to make sure that a Dynamics record is only linked to a single SharePoint folder before

Release Notes

The most recent changes to DocuSign for Microsoft Dynamics are:

Version 7.0 - August, 2021

- Flexibility to select specific Documents to sign or send for signature.
- Add contacts from Dynamics as DocuSign envelope recipients.
- Restore envelopes for selected time period that failed to write back or were lost upon uninstall/reinstall.

Version 6.6 - March, 2021

- DocuSign now launches in a new browser tab.
- On a mobile device, launching DocuSign will direct users to the DocuSign mobile app.

Version 6.5 - February, 2021

- Performance improvements to Sign Attachments and Get Signatures with DocuSign.

Version 6.4 - August, 2020

- Bulk Sending

Version 6.3 - August, 2019

- Ability to select partner data center to which to connect.
- Better error messaging.
- Various bug fixes.

Version 6.2 - June 25, 2019

- Updated error received when insufficient permissions from "An unknown error has occurred" to "You do not have permission to access this page."
- Fields now respect formatting properties in regards to font type, color, size, italic, bold, and underline.
- Fixed an error where user was redirected to the login screen after configuration instead of the admin screen.
- Support added for all DocuSign servers globally (AU, CA, EU, NA, etc.).
- Created a new custom workflow action known as multi-merge that allows up to 25 merge fields to be written in a single action.
- Fixed a problem with merge fields not writing back when Sign in Person was used.
- Fixed a problem where merge field write-back was failing under specific circumstances.
- Fixed a problem with formula fields not working when number formatting was set to 1.000,00 instead of 1,000.00.
- The Unified Interface for Dynamics 365 is now supported.
- Miscellaneous performance improvements and other minor system fixes.

Version 6.1 - July 19, 2018

- All references to AutoPlace text have been removed until a bug preventing this feature from working in Dynamics is fixed

- Multiple custom buttons- Administrators can now select any number of custom actions that they can assign to a given entity from a menu on the entity itself.
- Fixed a bug where having “Most Recent” selected in the Add Document workflow activity would cause an error.
- Fixed a bug that was causing an “Unknown error occurred” message to be displayed after successful completion of the Get Signatures guided sending flow.
- Security improvements (TLS 1.2 support)

Version 6.0 - November 2017

- Merge Field write back - It is now possible to write DocuSign data back to Dynamics fields through a workflow that can update fields, initiate another workflow, send an email, etc.
- SharePoint Online integration - you can now send documents from and save to SharePoint Online when you enable the server-to-server integration between Dynamics and SharePoint built in to Dynamics.
- Get Signatures Deprecated - Starting with v6.0, new customers will have the Send with DocuSign custom button enabled instead of using Get Signatures. Existing customers will be migrated to the Send with DocuSign in v6.1; until then, Get Signatures will function as usual.
- To use Payments with merge fields, set up the payment as a formula field and reference a number field into which you merge data.
- We now show the user-friendly name in the Entities tab on the DocuSign Admin page. To see the API name, hover over the Entity.
- You can use wild card (*) search when looking for documents to add to an envelope.
- Fixed a bug with in-person signing when using a template with a role placeholder.
- Added a custom button recipe video to the Admin page.