

rSTAR's HelloSign Connector for Microsoft Dynamics 365

USER GUIDE (Version 2.0.0)



Introduction

Thank You!

Thank you for purchasing rSTAR Technology's HelloSign Connector for Microsoft Dynamics 365. This connector brings the full eSignature functionality of HelloSign into Microsoft Dynamics, turning your CRM into a comprehensive contract creation, signing, and management hub.

Please be aware that for this connector to work, you need an existing license for Microsoft Dynamics 365 as well as a HelloSign license for each user.

Using This Guide

This user guide contains three distinct sections. The first is focused on initial setup and configuration of the connector. The second focuses on using the connector to create, send, and log signature documents directly in Dynamics 365. The final section contains answers to frequently asked questions that you can review for clarification and troubleshooting purposes.

If you have any questions that cannot be answered using this guide, please reach out to our team directly for support with your issue. You can reach us by completing the form on this page:

<https://rstartec.com/contact/>

About rSTAR Technologies

rSTAR Technologies is a 100% diverse-owned specialized System Integrator focused on Microsoft, Salesforce, and Oracle solutions for Manufacturers, Utilities, and Construction organizations. We transform leaders in the asset-intensive industries into business value all-stars by focusing on digital transformation initiatives.

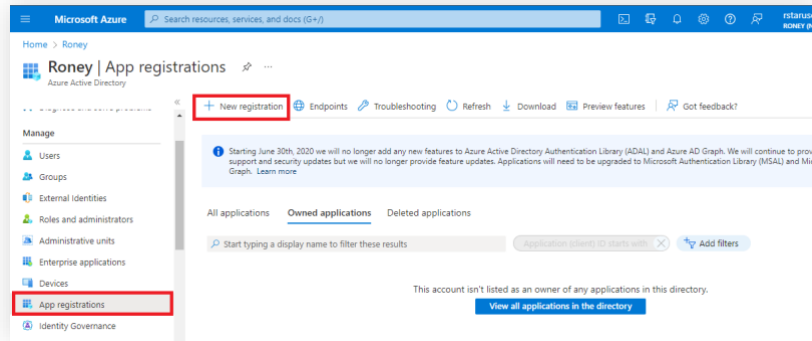
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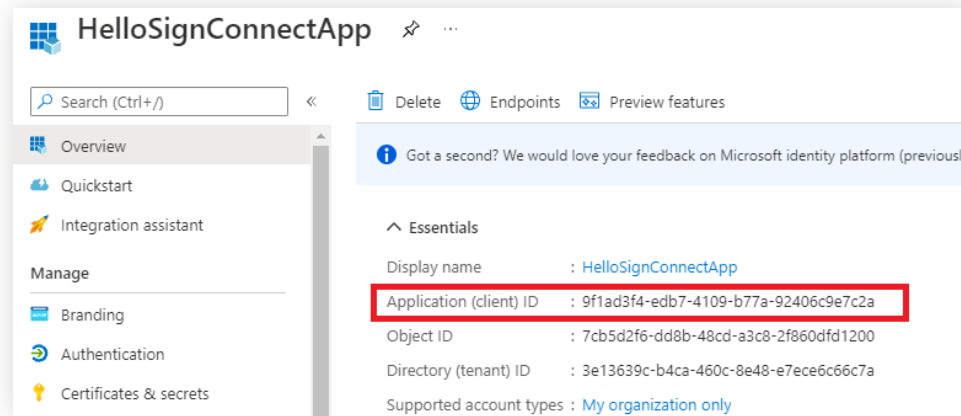
Part 1: Initial Setup & Configuration

MS D365 App Creation

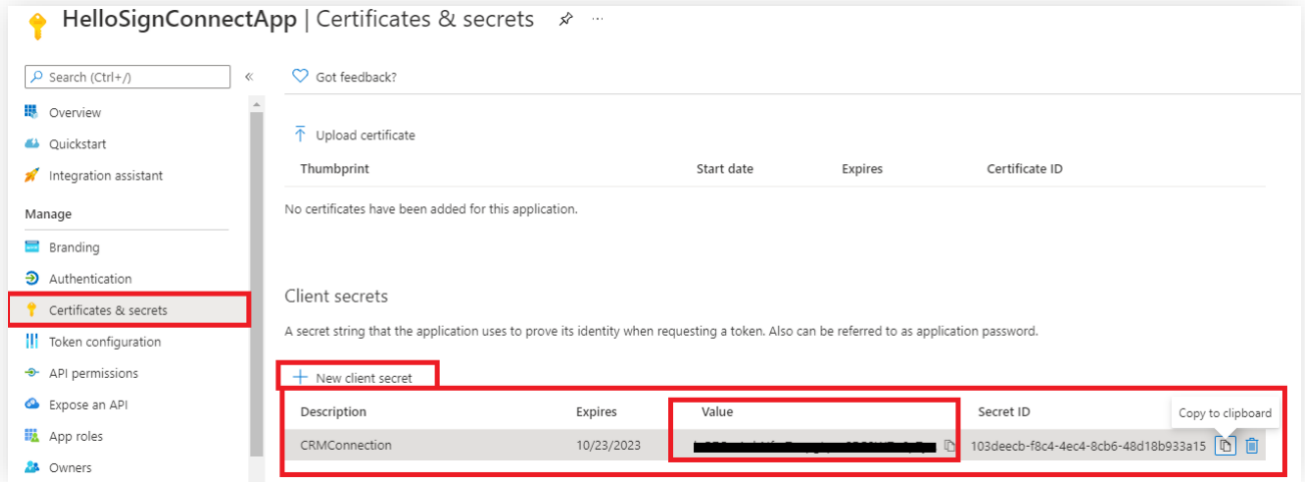
Step 1: Register an App



1. Open MS Dynamics.
2. Open <https://portal.azure.com/> in new tab in same browser
3. In the left menu, click on Azure Active Directory
4. In the left menu, click on App registrations
5. Click on New registration from menu at top
6. Provide name of the App and select Single Tenant Access from access scope
7. Open App and keep copy of **Application ID/Client Id** at top

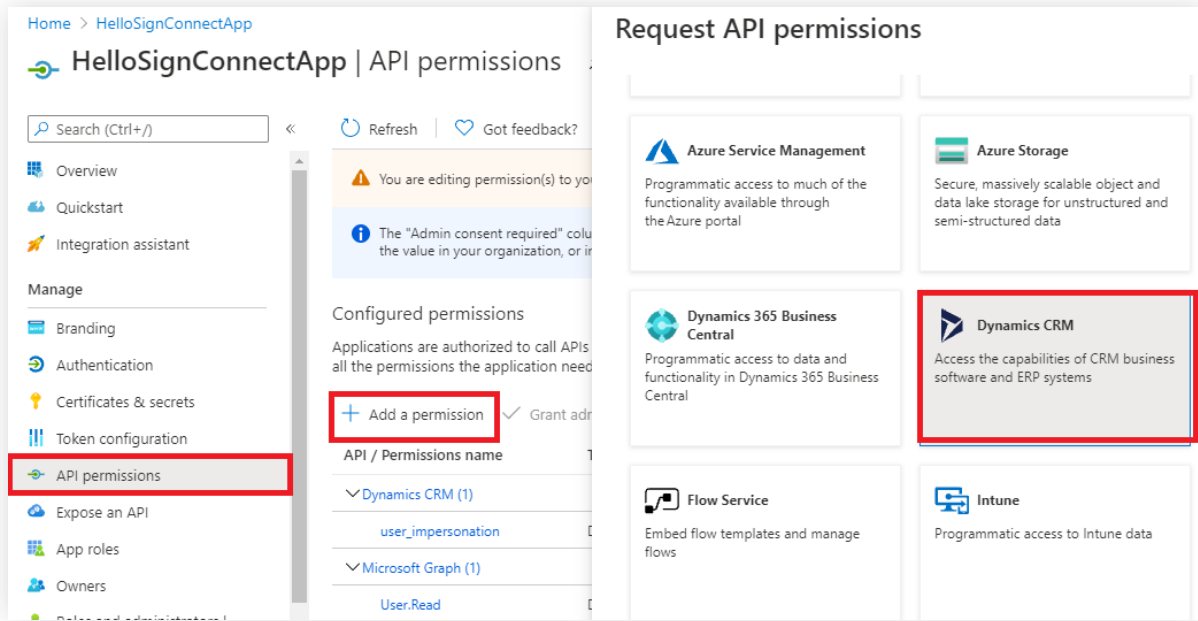


Step 2: Add Client Secret



1. In the left menu, click on Certificates & secrets
2. Click on 'New client secret'. Provide Name and set Expiry of the App. Save it
3. Copy the 'Value' from the secret list as mentioned in the screenshot
4. This value will be considered as **Client Secret**

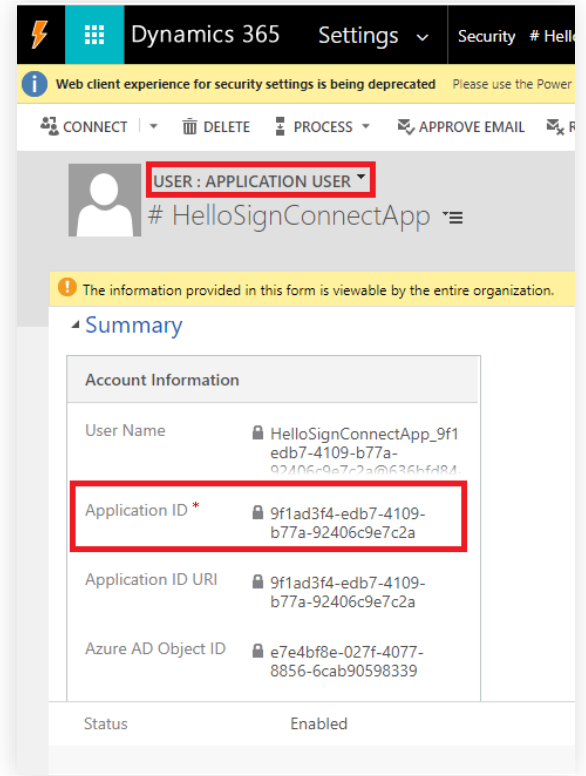
Step 3: Add CRM Permissions



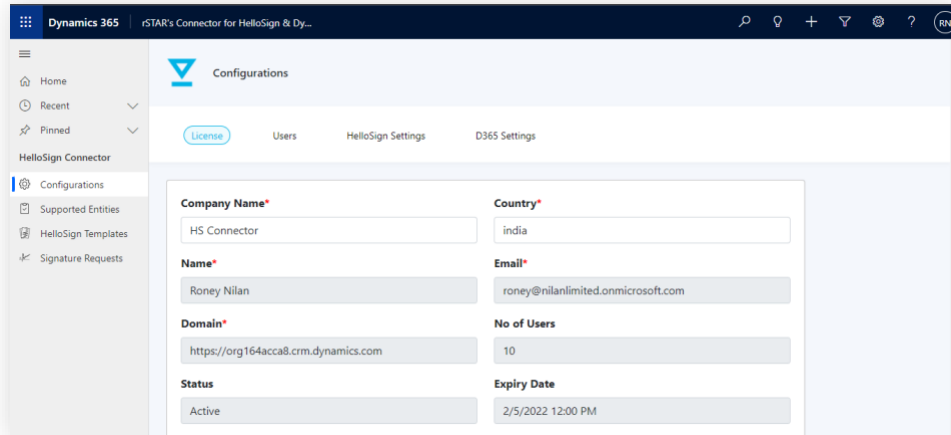
1. In the left menu, click on API permission
2. Click on 'Add a permission'. Select 'Dynamics CRM' from permission and provide permission

Step 4: Create Application User

1. Go to Users in MS Dynamics. Click on +New
2. Select user type 'APPLICATION USER' at the top
3. Provide **Application ID** and save the record



Subscription and App connection



Step 1: Activate Subscription

1. Click on License tab
2. Provide information of Company Name, Country. Name, Email and Domain field will be automatically populated
3. Click on 'Activate Trial'. It will activate the trial

Step 2: Add User Access

1. Click on User tab
2. It lists all CRM users on the left. To add users, select the user on the left and click on ">" button to add as HelloSign Connector user

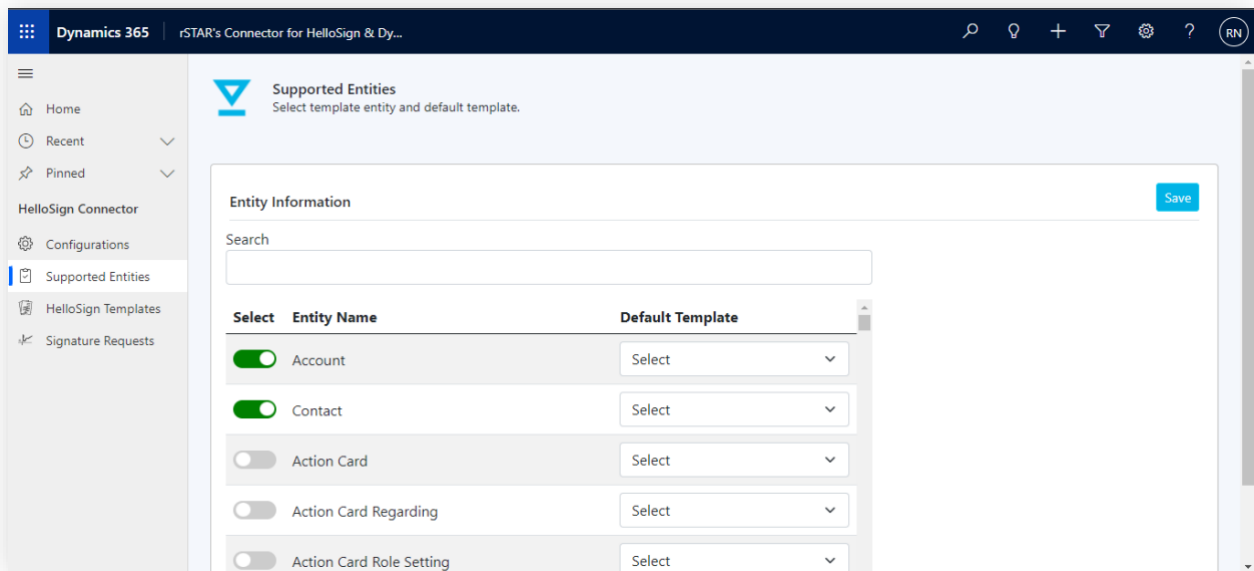
Step 3: HelloSign Connection

1. Click on HelloSign Settings tab
2. Click on Connect button
3. It will ask to authenticate HelloSign and access
4. Allow the access and it will be connected

Step 4: D365 Connection

1. Click on D365 Settings tab
2. Provide ServiceURL, Client Id and Client Secret
3. Click on Connect button. It will connect to D365

How to Activate HelloSign Entities



1. Click on Supported Entities menu on the left
2. It will list all the D365 entities
3. Select entities to enable for HelloSign use
4. Click on Save to save the settings.

Part 2: Using the Connector

How to Create HelloSign Templates

1. Click on the HelloSign Templates menu on the left
2. It will list all the HelloSign Templates
3. Click on + New

Create Template
Enter Template Information and select fields

Template Information Next

Name* Entity*

Delivery Method* Requester can attach additional files?

Select a file*

Supported format: .doc, .docx, .pdf, .ppsx, .ppt, .pptx, .jpg, .jpeg, .png, .xls, .xlsx, .txt, .html, .gif.

#	File Name	Remove
1	search-dms.pdf	

4. Provide template information and upload file for signature
5. Click on Next

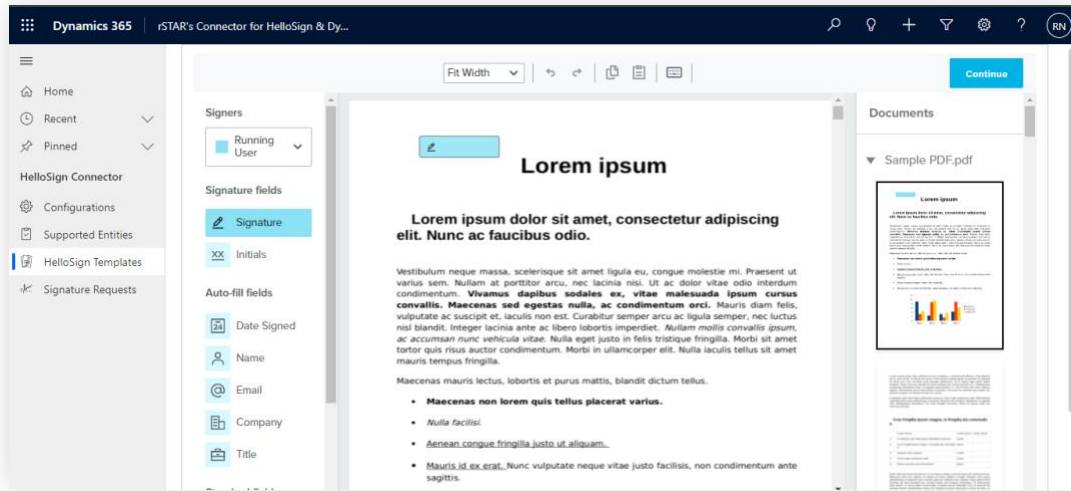
Create Template
Enter Template Information and select fields

Template Information Back Prepare Document

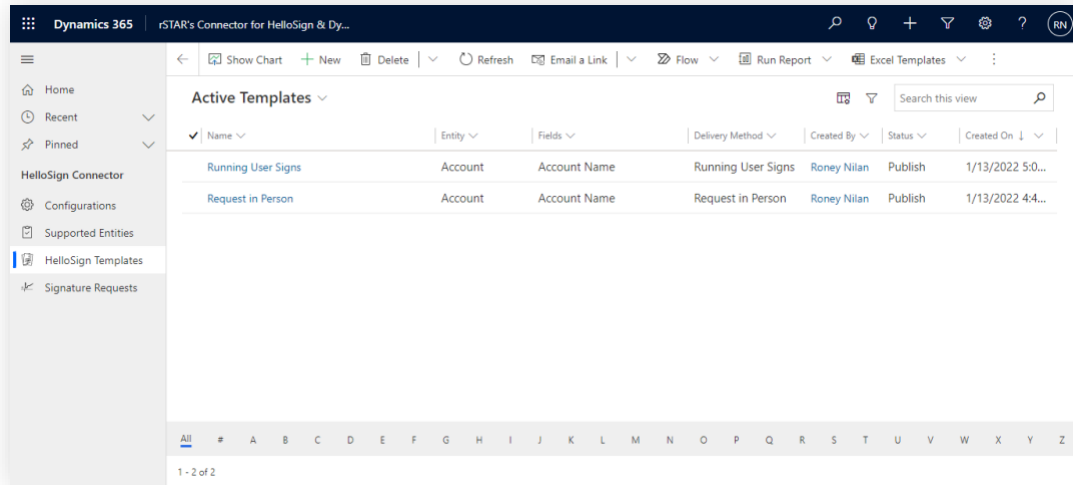
Search

Select	Field Name	Writeback?
<input checked="" type="checkbox"/>	Account Name	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Account Number	<input type="checkbox"/>
<input type="checkbox"/>	Account Rating	<input type="checkbox"/>
<input type="checkbox"/>	Address 1	<input type="checkbox"/>
<input type="checkbox"/>	Address 1: Address Type	<input type="checkbox"/>
<input type="checkbox"/>	Address 1: City	<input type="checkbox"/>
<input type="checkbox"/>	Address 1: Country/Region	<input type="checkbox"/>

6. Select the entity fields to add in Template
7. Click on Prepare Document



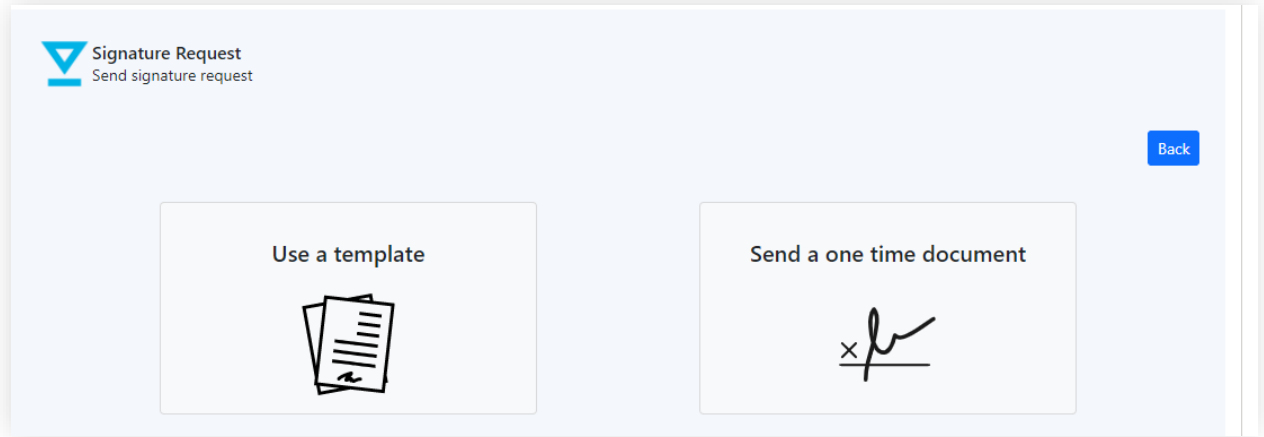
8. Place Signature and fields on template
9. Click on Continue. It will save the template as Draft
10. Click on Publish to publish the template
11. Only published templates can be used to send a signature request



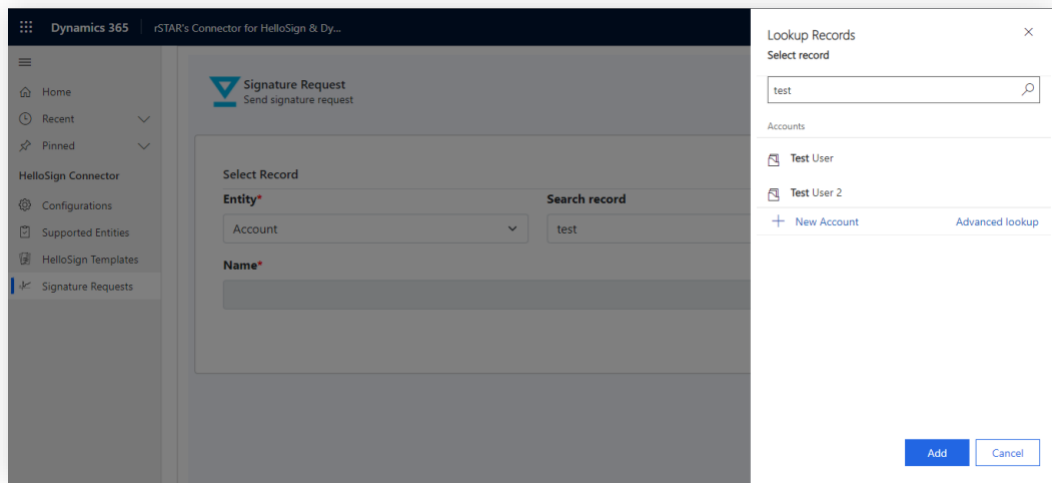
Send Custom Signature Request

1. Click on the Signature Requests menu on the left
2. It will list all the Signature Requests

3. Click on + New
4. There are 2 options: 1- Use Template, 2- Send a one-time document



When Using a Template



1. Select Entity and Search the record of the Entity. Add record

Select Template

Template*

Template Using Email

Enter Details

Signer*

Type*	Role	Person	Name*	Email*	Order
User	Role1	Search	Nanji Mange	nanji.mange@sofbang.com	-

Please add all the details of signers.

Add Message*

Test Email

Message for Receiptant

1. Select Template, provide Signer information, Add Message and Description
2. In Signer, you can select CRM User, CRM Contact and Other signer
3. For CRM User and CRM Contact, you can search them
4. For Other Signer, you need to add Name and Email
5. Click on Submit. It will send a signature request using Email
6. You can also create Signature Request for Embedded signature of Delivery type "Request in Person" and "Running User Signs". In these methods, signer need to sign on the spot

Sending a One-Time Document

Signature Request
Send signature request

Select Record

Entity* Search record

Account Search

Name*

Solbang Account

Select a file*

Choose File No file chosen

Supported format: .doc, .docx, .pdf, .ppsx, .ppt, .pptx, .jpg, .jpeg, .png, .xls, .xlsx, .txt, .html, .gif

Max supported size: 15 MB

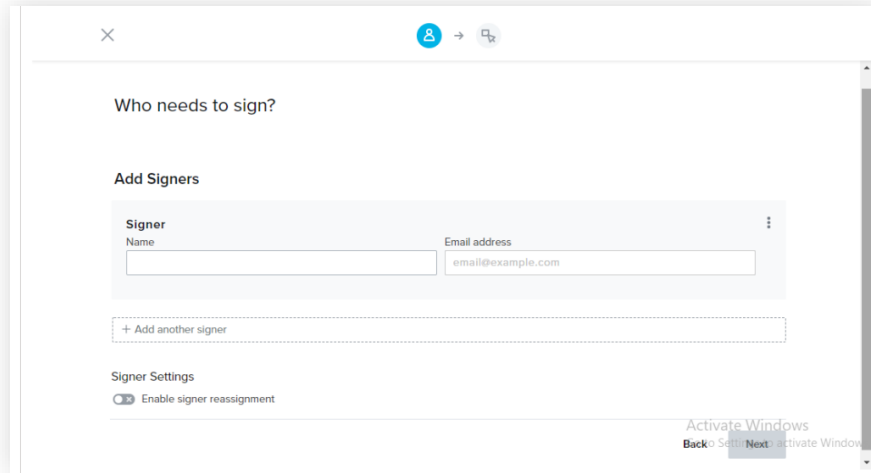
#	File Name	Remove
There is no attached.		

Subject*

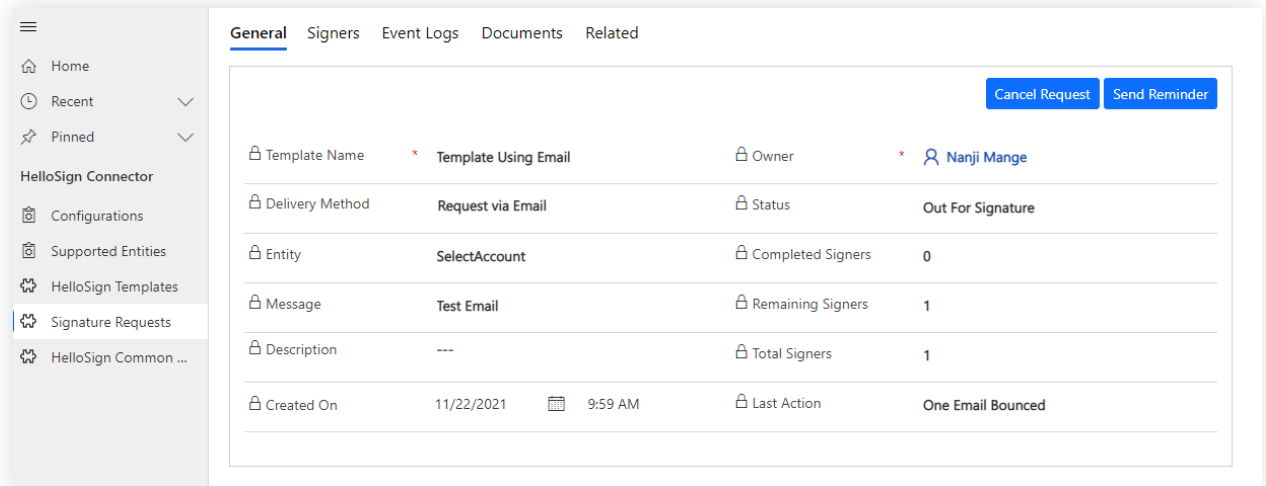
Description

Submit

1. Select an Entity and Search record
2. Select a file, add subject and description. Add the details and click on Submit. It will redirect to HelloSign Send Signature Form



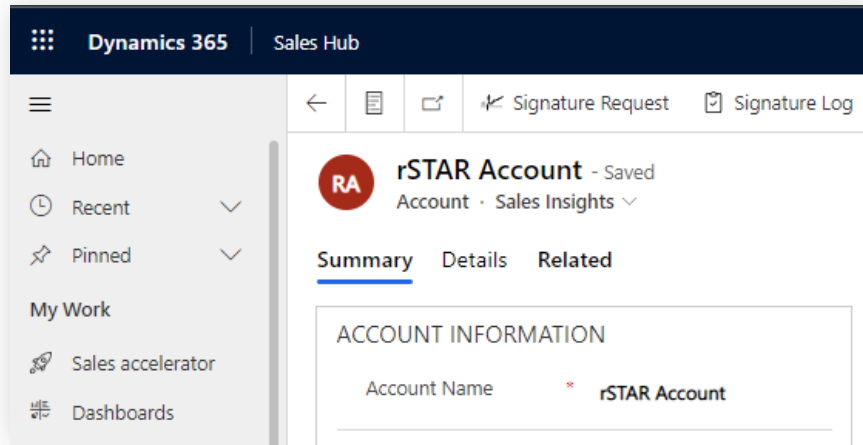
3. Add Signer, Email click on Next
4. Place Signature Placeholder and click on Send for signature
5. It will send signature using the file you have attached
6. After sending Signature Request you can open it.



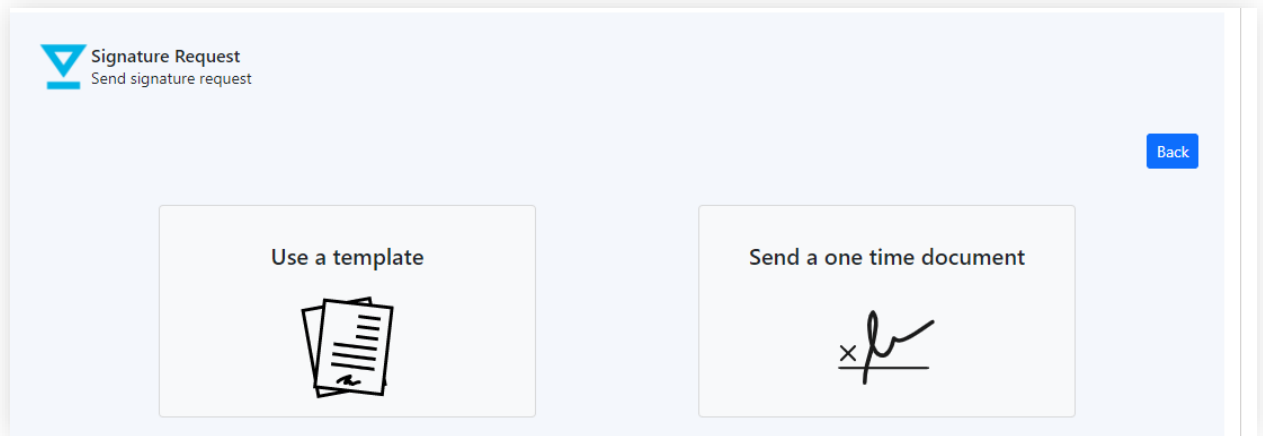
- **General:** It will show parameter and status of the Signature Request
- **Cancel Request:** User can cancel the request using the button.
- **Send Reminder:** User can send reminder to signers.
- **Signers:** It will list of the Signer and Status of Signature
- **EventLogs:** It will show Event Logs of Create, View, Sign, Cancel and Complete
- **Document:** It will show latest document and allow to download.

Send Signature Request From Record

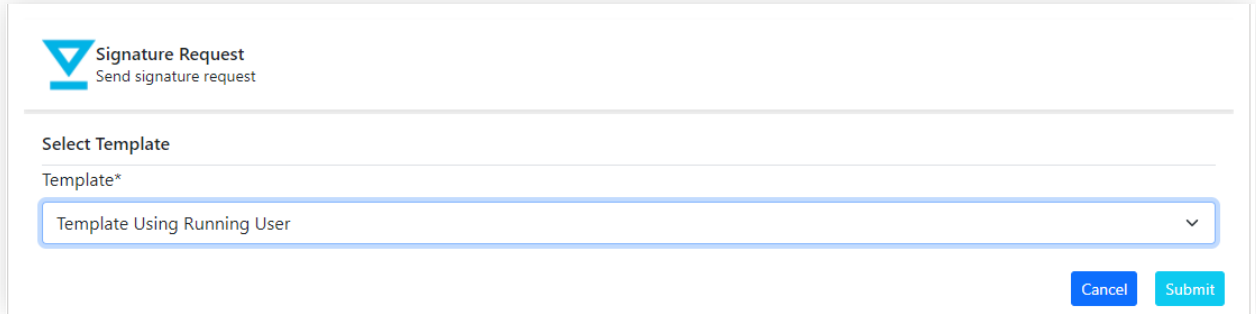
1. Open a record for which you want to send a signature request.



2. There will be 2 buttons at the top 1- Signature Request, 2- Signature Log
3. These buttons will be only visible if the Entity is enabled from the Supported Entities menu
4. Click on Signature Request. It will open a form
5. There are 2 options: 1- Use Template, 2- Send a one-time document



Using a Template



Signature Request
Send signature request

Select Template

Template*

Template Using Running User

Cancel Submit

1. Select the template. This time we are selecting a template with Running User Embedded Signature
2. Click on Submit. It will open an iFrame to sign



3. Complete the Signature process

Sending a One-Time Document

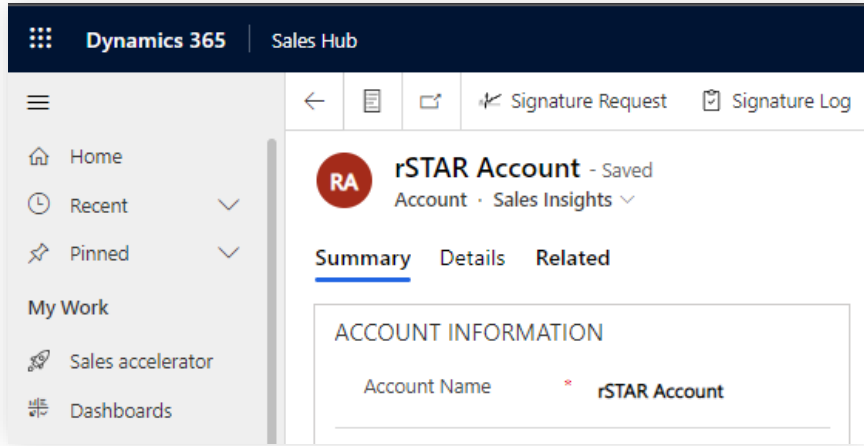
The screenshot shows a web form titled "Select a file*". At the top, there is a "Choose File" button and a text field containing "No file chosen". Below this, it lists supported file formats: .doc, .docx, .pdf, .ppsx, .ppt, .pptx, .jpg, .jpeg, .png, .xls, .xlsx, .txt, .html, .gif, and states "Max supported size: 15 MB". A table with columns "#", "File Name", and "Remove" is present, but it is empty with the text "There is no attached." below it. The form also includes a "Subject*" text field and a "Description" text area. At the bottom right, there are "Cancel" and "Submit" buttons, along with a watermark for "Activate Windows".

1. Select a file, add subject and description. Add the details and click on Submit. It will redirect to HelloSign Send Signature Form

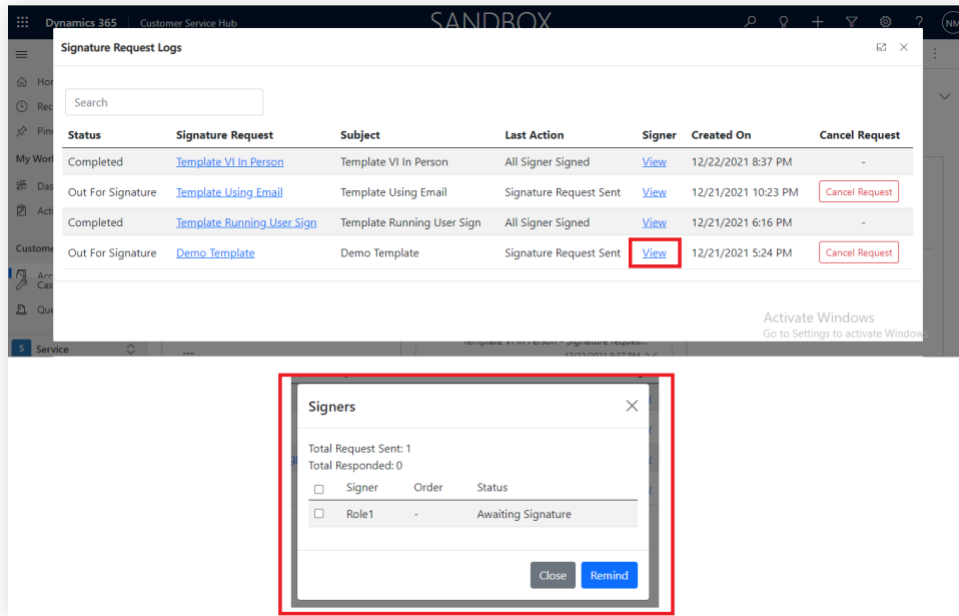
The screenshot shows a web form titled "Who needs to sign?". It has a close button (X) and user icons at the top. The main heading is "Who needs to sign?". Below it is the "Add Signers" section, which contains a table with two columns: "Signer Name" and "Email address". The "Email address" field contains "email@example.com". There is a "+ Add another signer" button below the table. At the bottom, there is a "Signer Settings" section with a toggle switch for "Enable signer reassignment" which is currently turned on. At the bottom right, there are "Back", "Next", and "activate Window" buttons, along with a watermark for "Activate Windows".

2. Add Signer, Email click on Next
3. Place Signature Placeholder and click on Send for signature.
4. It will send signature using the file you have attached.

Signature Request Logs for Recordkeeping



1. Open a record for which you want to send a signature request
2. There will be 2 buttons at the top 1- Signature Request, 2- Signature Log
3. These buttons will be only visible if the Entity is enabled from the Supported Entities menu
4. Click on Signature Log. It will open a popup
5. It will contain all the Signature Request logs
6. It will have 2 buttons to View signer and Cancel Request for cancel the request



Frequently Asked Questions

General FAQ

- ⇒ **What versions of Dynamics CRM are supported?**
This connector is compatible with Microsoft Dynamics 365 v9.2.2 and above (online and on-premises).
- ⇒ **Is the plugin supported on all browsers?**
This plugin provides support for Edge, Firefox, Chrome, and Safari.
- ⇒ **Do we need to purchase a HelloSign license for each user?**
Yes. Since each user need to connect with HelloSign, they must have a HelloSign account.

Technical FAQ

- ⇒ **Are there any roles available for the connector?**
There are 2 roles.
 1. **HelloSign Administrator:** This kind of user can manage all configurations (Subscription, User, HelloSign and D365 settings).
 2. **HelloSign User:** This user can only send signature requests using a template shared with them or one they have created themselves (as allowed by admin permissions).
- ⇒ **Who can set configuration settings?**
Only a user with HelloSign Administrator role can set default configuration settings.
- ⇒ **Where can I set configurations?**
You can set configurations in "Sofbang Solutions for HelloSign and Dynamics 365" App.
- ⇒ **Where I can give access to other users?**
You can add licensed users via Configurations à Users in the "Sofbang Solutions for HelloSign and Dynamics 365" App.
- ⇒ **Does each user need to connect their HelloSign account?**
Yes, each user needs to connect their HelloSign account from Configurations à HelloSign Settings in the "Sofbang Solutions for HelloSign and Dynamics 365" App.
- ⇒ **What the D365 Azure App used for?**
It is used to connect D365 with HelloSign.
- ⇒ **How can we create a D365 Azure App?**
We have provided steps to create an Azure App in User Manual. See "Initial Setup and Configuration."

- ⇒ **What are the roles required for the Application users we have created for an Azure App?**
There are 2 roles required:
 1. **System Administrator**
 2. **System Customizer**

- ⇒ **Can we test HelloSign in Test Mode?**
Yes you can test HelloSign functionality in Test Mode using the settings "Test Mode" from Configurations à HelloSign Settings in "Sofbang Solutions for HelloSign and Dynamics 365" App.

- ⇒ **How can we enable D365 Entities to send signature a request with HelloSign?**
Entities can be enabled from "Supported Entities" menu in the App.

- ⇒ **Does the connector naturally import all the existing templates from HelloSign account to D365?**
No, it doesn't bring existing templates to D365.

- ⇒ **Can a user with the "HelloSign User" role create Templates?**
Yes, if the HelloSign Administrator allows them to using the settings "Allow Template Creation to Normal Users" from Configurations à HelloSign Settings in "Sofbang Solutions for HelloSign and Dynamics 365" App.

- ⇒ **Can a user edit templates created by another user?**
No

- ⇒ **Can a user send a signature request using the templates created by other users?**
Yes, if the template is shared with the user or the user has the "HelloSign Administrator" role. However, any user can send only templates created by users who belong to the same HelloSign organization.

- ⇒ **How can one user share a template with another user?**
The user needs to select one or more templates and click on the "Share" button at top. They need to select users and assign one of the two levels of access: "Read" or "Assign To"

- ⇒ **How can I send a Signature Request?**
There are 2 ways to send a Signature Request.
 1. **From Record:** Go to a particular record (i.e. Account). There will be 2 button visible in ribbon at top: "Signature Request" and "Signature Logs." Click on "Signature Request" to send a Signature Request.
 2. Go to the Signature Request menu in the App. Click on the "New" button. The user can select Entity, Record and Template to send Signature Request.

- ⇒ **Can I send a one-time Signature Request without template?**
Yes, when you send New Signature Request, there are 2 options. One option is "Send a one-time document." Use this option to send Signature Request.

- ⇒ **Can I attach more than one document while sending a Signature Request?**
Yes, please select the “Requester can attach additional files?” checkbox while creating/editing the template. It will bring up all the documents of the current record and provide the option to add new documents from the computer.

- ⇒ **What are the delivery methods supported?**
There are 3 types of delivery methods supported:
 1. **Request via Email:** Send Signature Request via email to sign
 2. **Request in Person:** A person in the same physical space can sign in person
 3. **Running User Signs:** Only a logged user can sign

- ⇒ **Can we send the field information of the entity record with Signature Request?**
Yes, you can select fields to send with Signature Request while creating the template. It will automatically fetch the field information and send it with the Signature Request in the Template.