Adobe Sign
for Microsoft Dynamics

User Guide
(v6)

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Overview

Adobe Sign integration to Dynamics offers a plug-and-play solution to obtain signatures for any form/contract documentation needed. This integration provides the following benefits:

- Adobe Sign is built in to CRM records such as Contacts, Accounts, Leads, Opportunities, Orders, Invoices, Quotes, Contracts, and any custom CRM entity developed by your Admin.
- Accelerates the quote-to-cash process by sending agreements—such as contracts and sales documents—from Dynamics with one click.
- Admin configurable data mapping that merges data from Dynamics entities—such as accounts and contacts— into agreements, and pushes data gathered from signers during the signing process back in to Dynamics.
- Makes it easy for recipients to sign anywhere, anytime, on any device.
- Makes it possible to track documents sent out for signature from within Dynamics.
- Eliminates manual steps across the entire process.

This integration is available for Microsoft Dynamics CRM Online, Dynamics 365 and CRM 2013/2015/2016 (on-premises).

Gaining Access to Adobe Sign

Adobe Sign is installed by the Dynamics administrator, and access is granted via security roles. If you require access and do not see the Adobe Sign option on your main page, contact your Dynamics administrator to request user access.
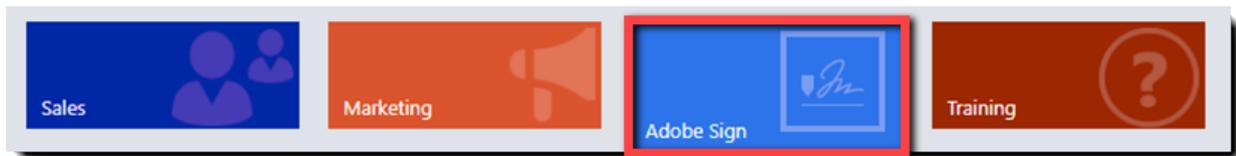
Note: For Adobe Sign to properly function in Dynamics, your browser must have pop-ups enabled. If at any time you receive a message indicating "Only secure content is displayed", click the button to **Enable all content.**

Sending for Signature

When the Adobe Sign integration with Microsoft Dynamics CRM is installed, a Send for Signature option is available from the **More Commands** (**…**) menu. You can use the **Send for Signature** option to send agreements for signature from a Dynamics Entity or from the Agreements page.

To send an agreement from an entity:

- Navigate to an entity record (e.g., Opportunity, Account) within CRM and click to open it
- Click the *More Commands* **(…)** menu
- Select **Send for Signature** from the menu

Note: Reusable templates can be created, by the Dynamics administrator, for any recurring processes that have a predictable workflow. These templates are listed (alphabetically) in a sub-menu after you click *Send For Signature.*

At the bottom of the template list is **New Agreement**, for agreements that aren't predicated on a template.
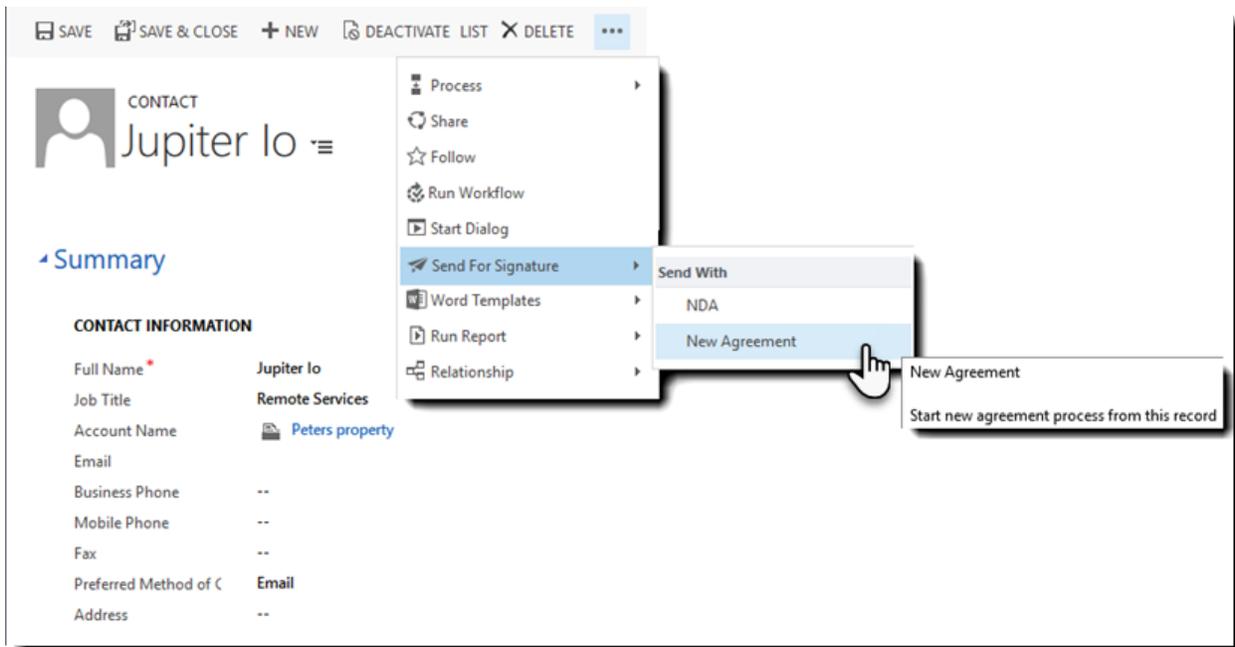
A new Agreement page opens, and any field values defined on the Agreement Template automatically populate.

To define and send an agreement you need only a few things:

- An Agreement Name – How the Agreement is highlighted in the subject line of the signer's email as well as internal reporting
- A Recipient – The person or list of people that you need to sign or approve the document
- A document that needs to be signed – This can be one or more form, contract or any other document that requires a legal signature

The Recipient section

One or more signers need to be defined in the Recipient section. Enter the recipients in the order you want them to sign the document. If you make a mistake, you can click the **Reorder Recipients** link on the right side of the window.

To define a recipient:

- Click the plus icon on the right of the window

This drops down an overlay where you can select the type of signer/approver:

1. Select the proper value from the Recipient Type picklist
   - **New** – When the recipient isn't a known value in Dynamics
   - **Contact** – For recipients that are defined Contact entities in Dynamics
   - **Lead** – For recipients that are defined as Leads in Dynamics
   - **User** – This describes internal users of your Dynamics environment
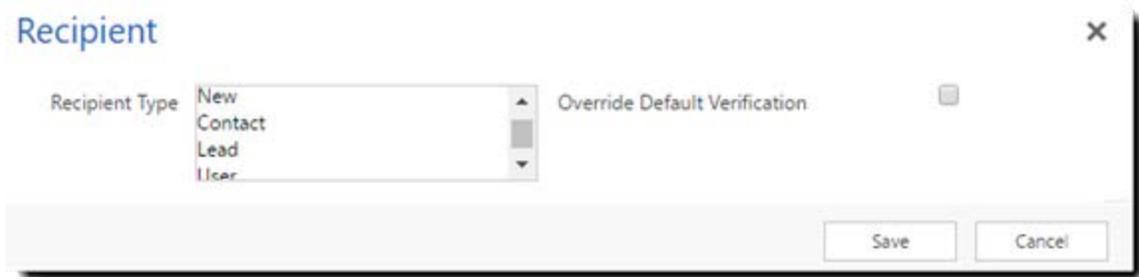
Note: Second factor verification is defined either on the Agreement Template, or at the account level. If you need to override the default, check the **Override Default Verification** check box. This action exposes a picklist where you can select a different verification process.

2(a). Selecting **New** changes the overlay to allow you to enter a Full Name and an Email Address.

This action will **not** save a new Contact/Lead to Dynamics, it only uses the name and email for the purpose of this transaction.
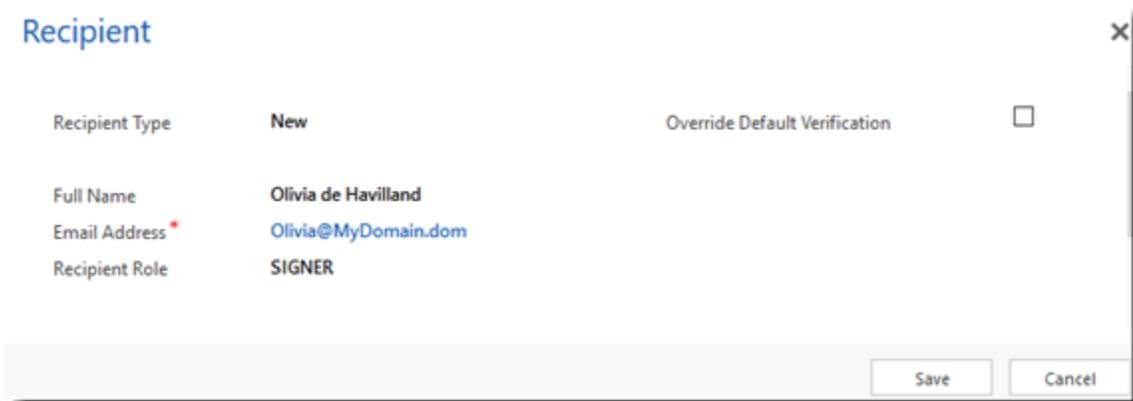
2(b). Selecting **Contact**, **Lead**, or **User** changes the overlay to search for the specific entity you chose. Type in the name (or part of it) and then click the search icon to pick the specific recipient you want to include.

Because Dynamics understands these types of entities, the email address is imported from the database.


All options allow you to designate the Recipient Role. The roles are:

- **Signer** (default) – Signers are required to apply at least one signature to the agreement.
- **Approver** – Approvers are not required to sign the agreement (although they can if signature fields are placed for them), but they have to actively "Approve" the agreement, which is a logged event.
- **CC** – Carbon Copied (CC'd) parties are included in the notification process of the agreement, but have no interaction with the agreement or signature cycle.

3. Once you have the recipient defined, click **Save**

4. Repeat 1-3 for all the signers/approvers required
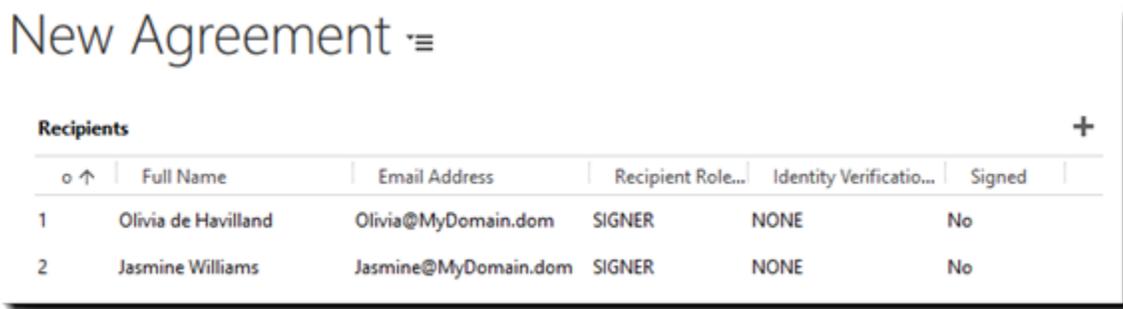
Note: Signers (by default) are granted access to the agreement in the order they are placed in your recipient list. You can edit the order of the signers/approvers by clicking the Reorder Recipient link on the right side of the screen, just under the recipient list.
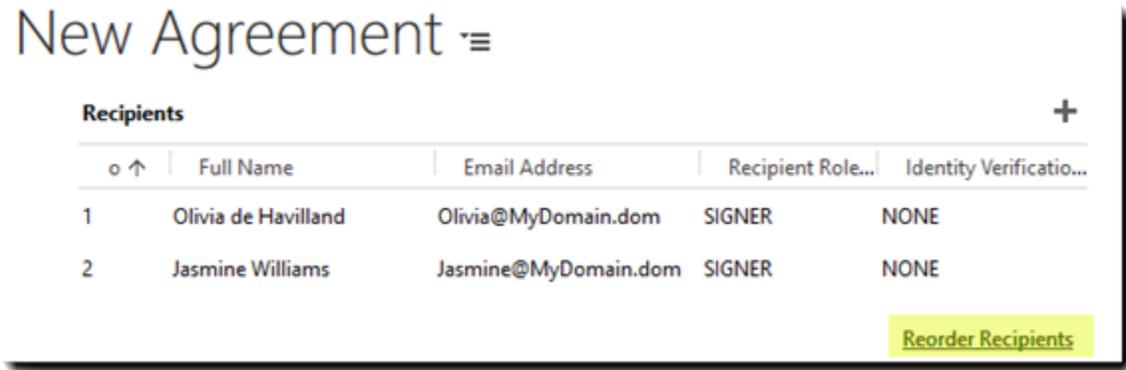
Single click any one recipient and then you can move them up or down in the list order. You can also add additional recipients or delete them from this view.
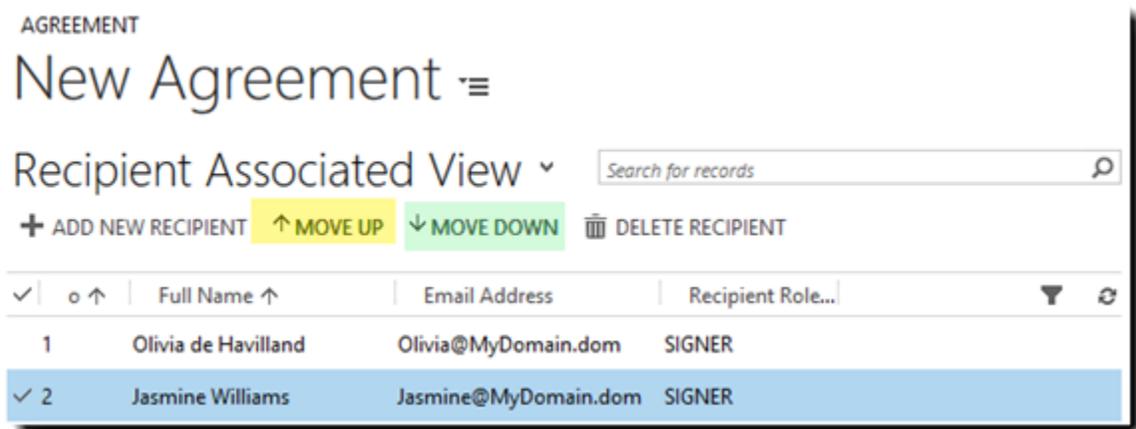
Self-signing and In-person signing

Just under the list of recipients you will find three fields (and one hidden field) that allow you to manipulate the signature flow:

- **In-person signing** – This option allows you to redirect the signature experience and open a signature window on your local system. This preempts the email process and allows you to get an electronic signature in person.
- **Signing Order** – There are two built in workflows for signatures:
  - o **Order Entered** (default) – This workflow enforces a strict sequential signature process based on the recipient list.
  - o **Any Order** – This workflow notifies all recipients at the same time and enables a parallel signature process.
- **I have to sign** – If you need to apply your signature to the document, change this value to **Yes**
  - o Enabling this makes the **Sender Signing Order** field visible
  - o Enabling this locks the **Signing Order** field with the value **Order Entered**

- **Sender Signing Order** – When you add yourself to the signature process you are presented with three options:
  - o **I sign first -** This option inserts the sender as the first recipient of the transaction
  - o **I sign last** – This option places the sender at the end of the signature cycle
  - o **Only I sign** – Useful when **only** the Sender is applying their signature

The Agreement Details / Options section

The Agreement Details define how the email and signature experience are constructed for your signers. There are three significant elements:

- **Agreement Message** – A custom note field where you can enter any message or instructions you would like your signer to be aware of
- **Signing Language** – This setting changes the language on the email and in the signing experience so your recipients can navigate the signature process in the language they prefer

The Agreement Options grant the sender access to manipulate the flow of the agreement in three ways:

- **Signature Type** – This setting defines the basic workflow of the agreement
    - **ESIGN** (default) delivers the agreement via email and expects that the recipients will apply their signature electronically
    - **WRITTEN** delivers your documents via email, prompting the signer to print the document and physically sign it. Then they must upload the document back to Adobe Sign system using the same email link
- **Preview and position signatures before sending** – This option forces the Adobe Sign Authoring environment to launch as soon as you send the transaction. The Authoring environment allows you to place or manipulate any existing form fields on the document. The agreement actually sends once the authoring environment is closed.
- **Agreement Expires** – When enabled, the agreement is set to automatically expire after a defined period of time (see next)

- **Days Until Agreement Expires** (Hidden field)– If you check **Agreement Expires**, then this field is exposed, and is used to define the number of days the agreement remains signable
    - Hidden if **Agreement Expires** Is set not enabled

- **Schedule recipient reminders** - Defines a reminder cycle for the transaction. Reminders can be configured to be sent to the current recipient on a daily or weekly cycle
- **Add post-signing landing page** – When enabled, you can dictate what URL the recipient is routed to after they complete their interaction with the agreement
- **Post-signing landing page** – This field contains the URL for the page you want to direct recipients to when *Add post-signing landing page* is enabled
    - Hidden unless *Add post-signing landing page* is enabled
- **Delay in seconds for redirect** – Required when a *Post-signing landing page* is defined, this setting dictates how much delay should be observed after the signature is applied, and before the recipient is re-directed to the designated landing page.
    - Hidden unless *Post-signing landing page* is configured

Security

Adobe Sign natively applies a legal signature using the default email based authentication process, but also allows for extended security in two forms:

- **Identity Verification** – Enhanced identity verification requires the signer to further authenticate before they can view the document and apply their signature. The types of authentication available depend on how your Adobe Sign account has been configured, but can include:
    - **Email** (default)– Enables no second factor verification
    - **Password –** Allows the sender to create a unique alphanumeric password that then must be communicated to the recipients out of band
    - **Web Identity –** Asks the recipient to authenticate using one of several social networks (Facebook, LinkedIn etc.)
    - **Knowledgebase –** Uses public databases to present several multiple choice questions to the recipient about their history (e.g. Address in 1998, Make of car in 2002)
- **Set password to open signed PDF** – This option password protects the final PDF copy of the agreement. The password is **not** stored in Dynamics, and has to be communicated to the recipients out of band

▲ Security

| Identity Verification | **PASSWORD** Enter Password: •••••••••••• | Confirm Password: •••••••••••• | Save |
| Set password to open signed PDF ☑ | Enter Password: •••••• | Confirm Password: •••••• | Save |

Add Files / Attachments

Documents can be added to the Agreement in one of two ways:

- **Upload file from your local system** – By clicking the plus icon in the Attachments section, you are prompted to browse your system for any file you would like to upload and attach to the agreement. This will work for networked drives (e.g. SharePoint)
- **Attach document or template from Adobe Sign Library** – By checking this box, you enable the list of document templates that have been uploaded to your Adobe Sign account. Single click the form you want to include, and then click the **Attach** button
    - Only your administrator can add documents to the library
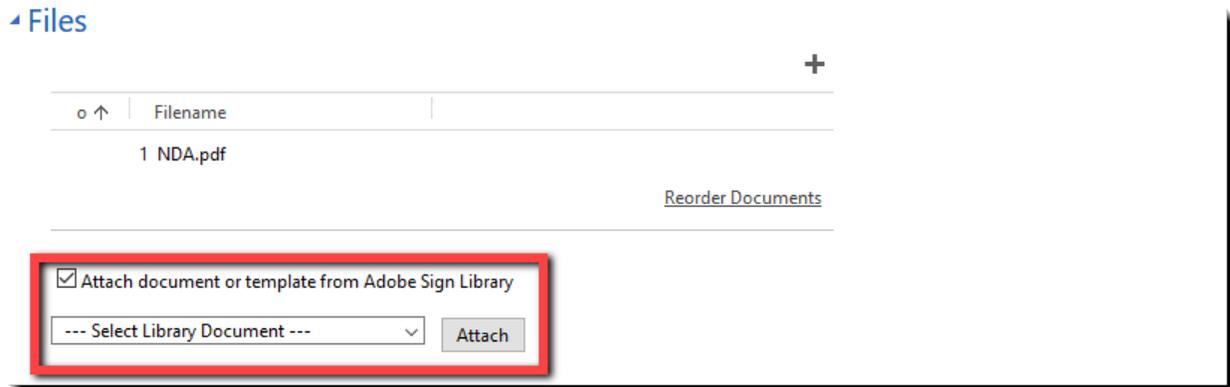
Note: All attached files are concatenated into one PDF for the signature process. The order the documents appear in is based on the order you list them in the Attachments section. If you need to reorder the documents, click the **Reorder Documents** link at the bottom of the Attachments section.

Once the recipients are defined, the files are attached, and any other field manipulation is completed, click **Send Agreement** from the top menu items
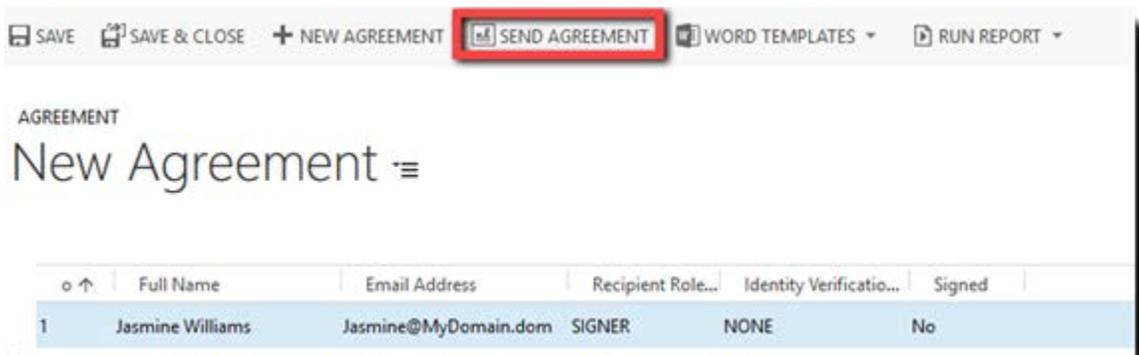
Sending from any entity using a template

Dynamics administrators have the ability to create one or more templates for any Dynamics entity (Contact, Opportunity, Account) that will pre-configure the agreement, reducing the amount of manual configuration for the Sender.

Templates are accessed through the *More Commands* (**...**) icon in the ribbon
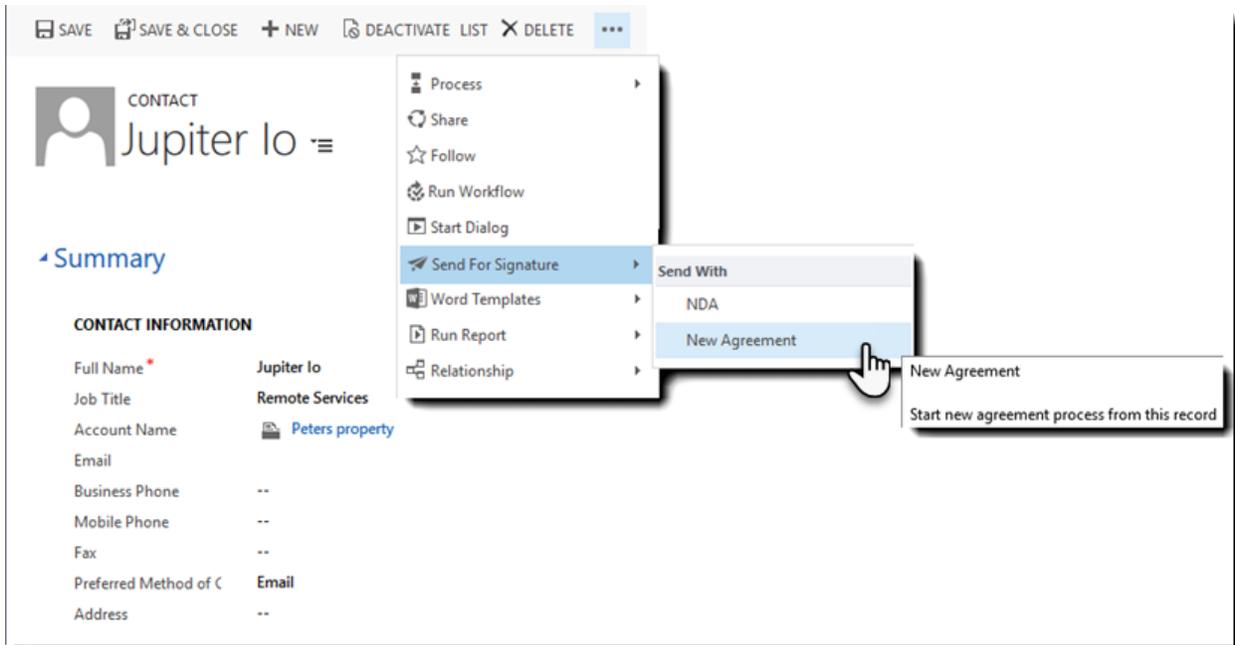
Checking Agreement Status

The status of an agreement indicates its current legal status, and is updated in Dynamics on a regular polling interval. The status values are:

- **Draft** – An Agreement that has been created, but not yet sent
- **Out for Signature** – Actively in the process of being signed
- **Signed** – Fully signed by all parties and completed
- **Declined** – Indicates that one of the recipients declined the agreement, canceling it in the system.
- **Canceled** – The signature process was canceled by the sender before all signatures could be obtained

The best way to find an agreement is to check the entities related to the primary entity you used to create the agreement.

For example, if you created an agreement using a Contact, you can check what entities are related by navigation to the Contact, and then clicking the down arrow just to the right of that Contact's name:
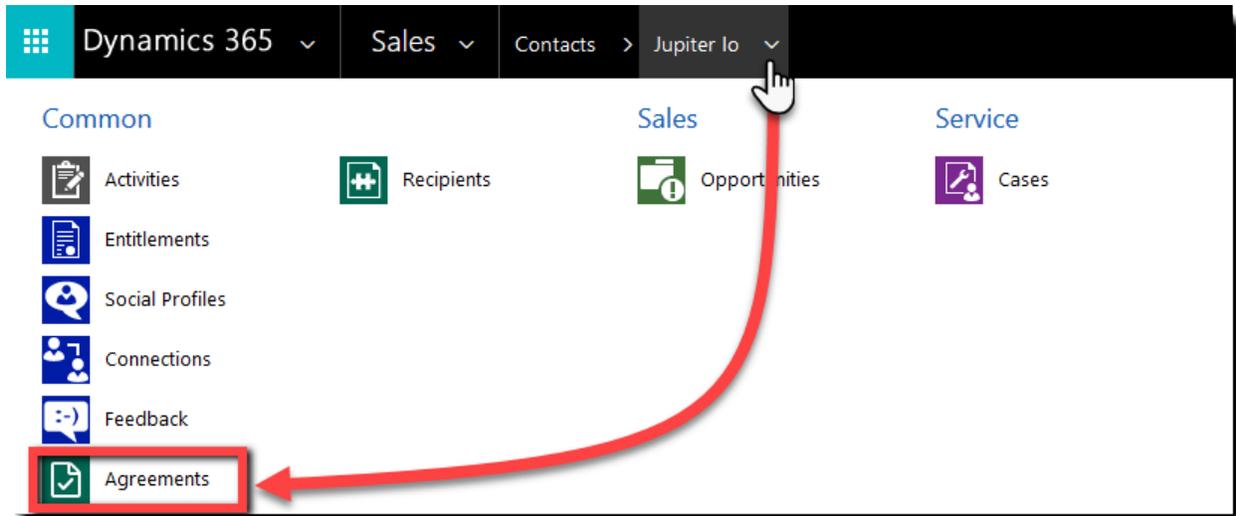
Opening the relationship window shows the Agreements object, and clicking that option opens the full list of agreements associated to the entity.

Another way to view the status of an agreement is to review the full list of agreements:

- Navigate to: **Adobe Sign > Agreements**
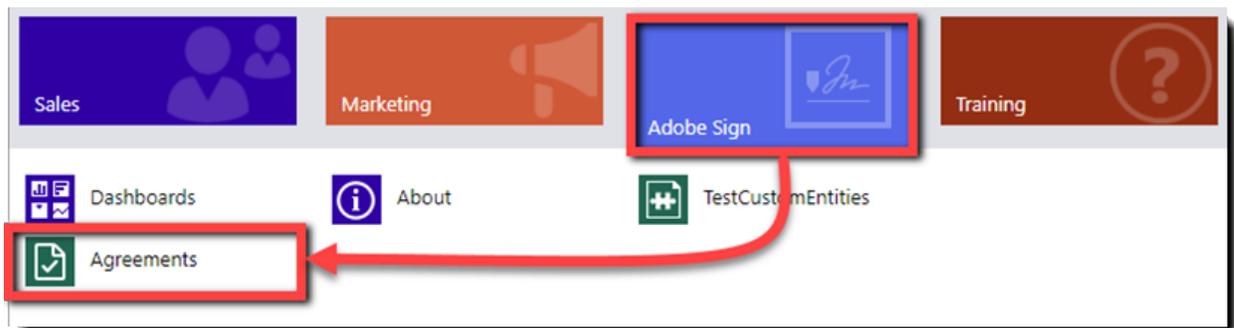
All agreements, regardless of entity, are listed in the agreements list on the Agreements page. For Signed agreements, the agreements lists display the *Name*, *Agreement Status*, and dates of the agreements. For Out for Signature and Draft agreements, only the applicable information displays.

Note: Signed agreements can also be found in the *Notes* section of the Dynamics entity that they are related to.

Updating Status, Sending Reminders and Canceling Agreements

Unsigned Agreements have three actions that can be applied to them:

- **Update Status** – Actively poll the Adobe Sign server to get the current status
- **Send Reminder** – Immediately sends an email reminder to the current signer of the agreement

- **Cancel Agreement** – Terminates the agreement in the system and sends a cancelation notice to the signer

Each of these actions can be initiated from inside the agreement using the buttons along the top.