

DaDaDocs for Dynamics 365 Administrator Guide

Install DaDaDocs app for PDF editing, e-signing,
and document generation without leaving Dynamics 365

Version
2.3



DaDaDocs

DaDaDocs for Microsoft Dynamics 365 Administrator Guide

Requirements:

- *Microsoft Dynamics 365 organization.*
- *PDFfiller user account.*

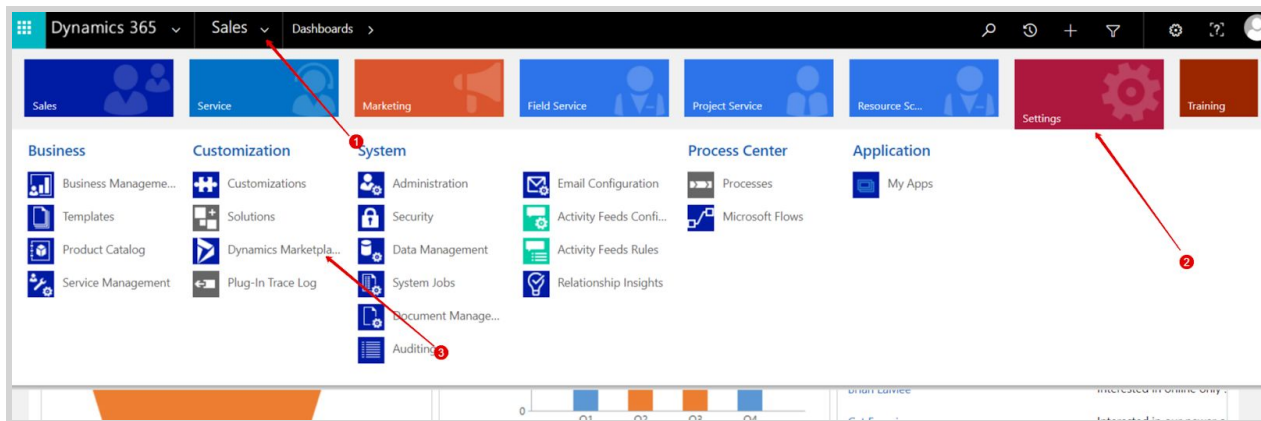
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Installation and configuration

Install DaDaDocs

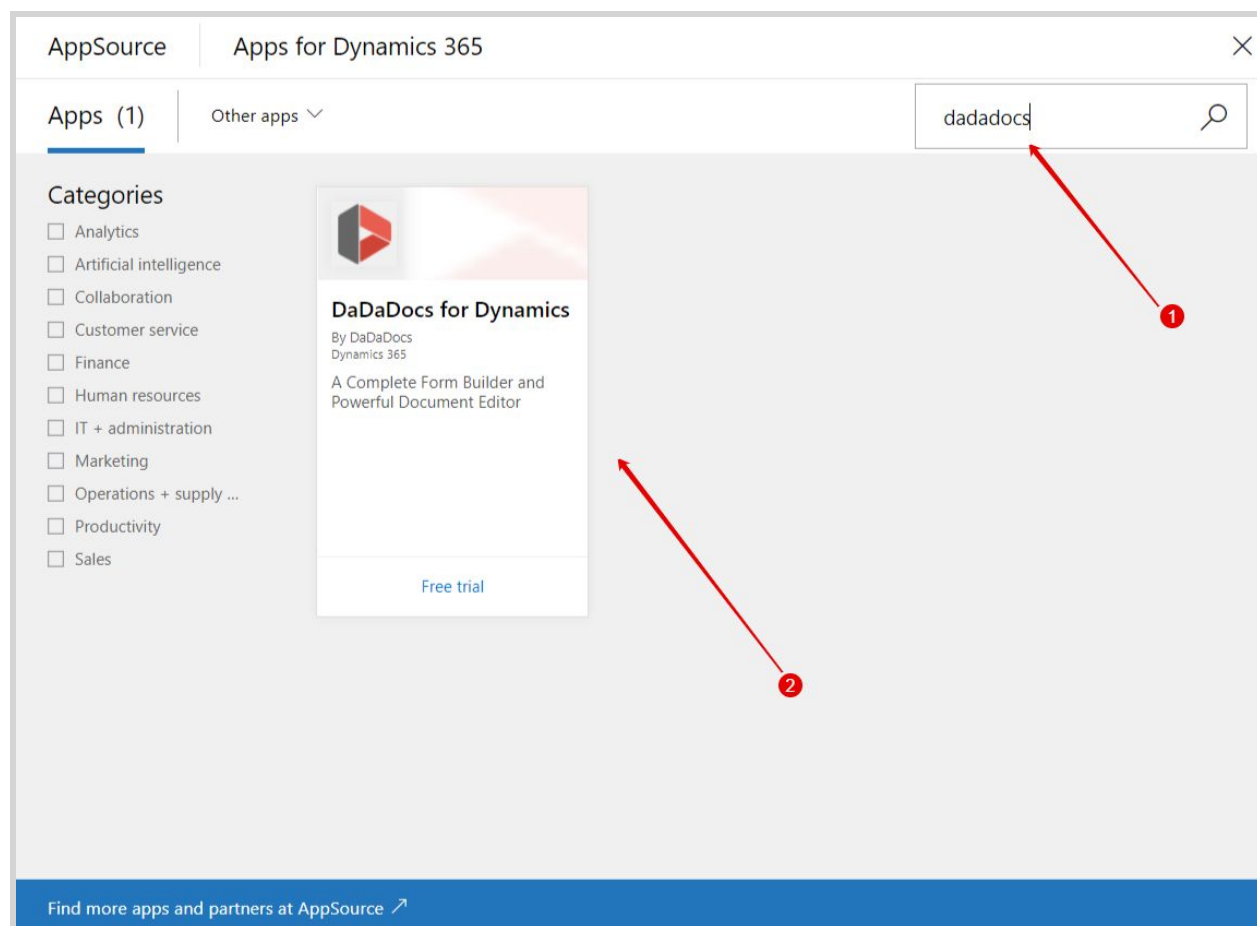
Follow these steps to install DaDaDocs for Microsoft Dynamics 365 organization.

1. Go to the **Settings** in the Dynamics main menu and select **Dynamics Marketplace** to proceed to the AppSource.

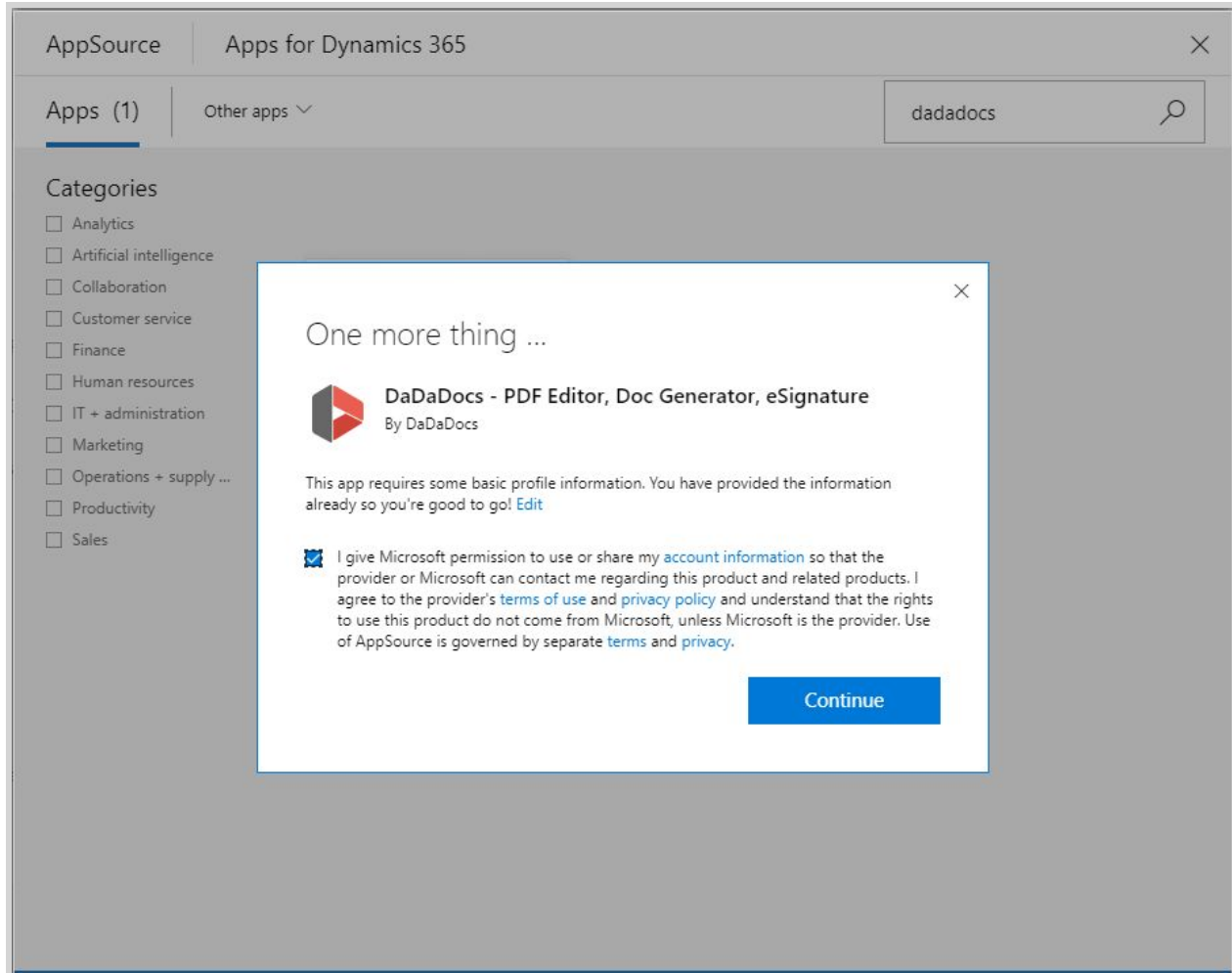


2. In the Search field type "dadadocs" and press Enter or click on the search icon. Click on the DaDaDocs application icon from the results below.

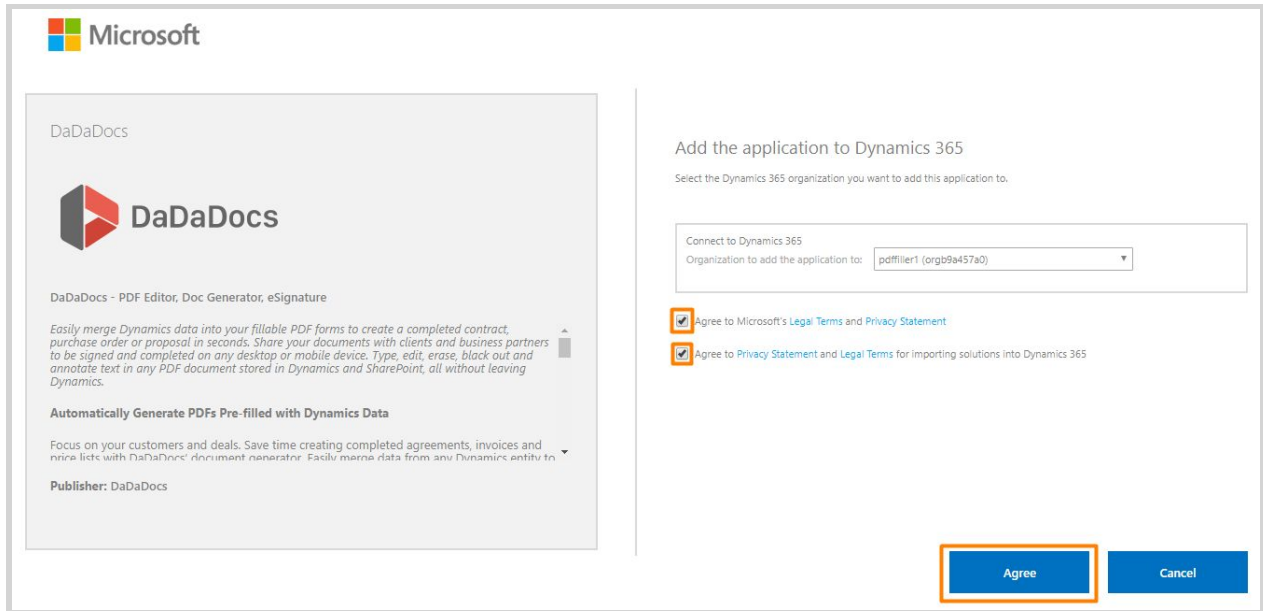
Alternatively click on the **Free trial** link on the DaDaDocs application icon.



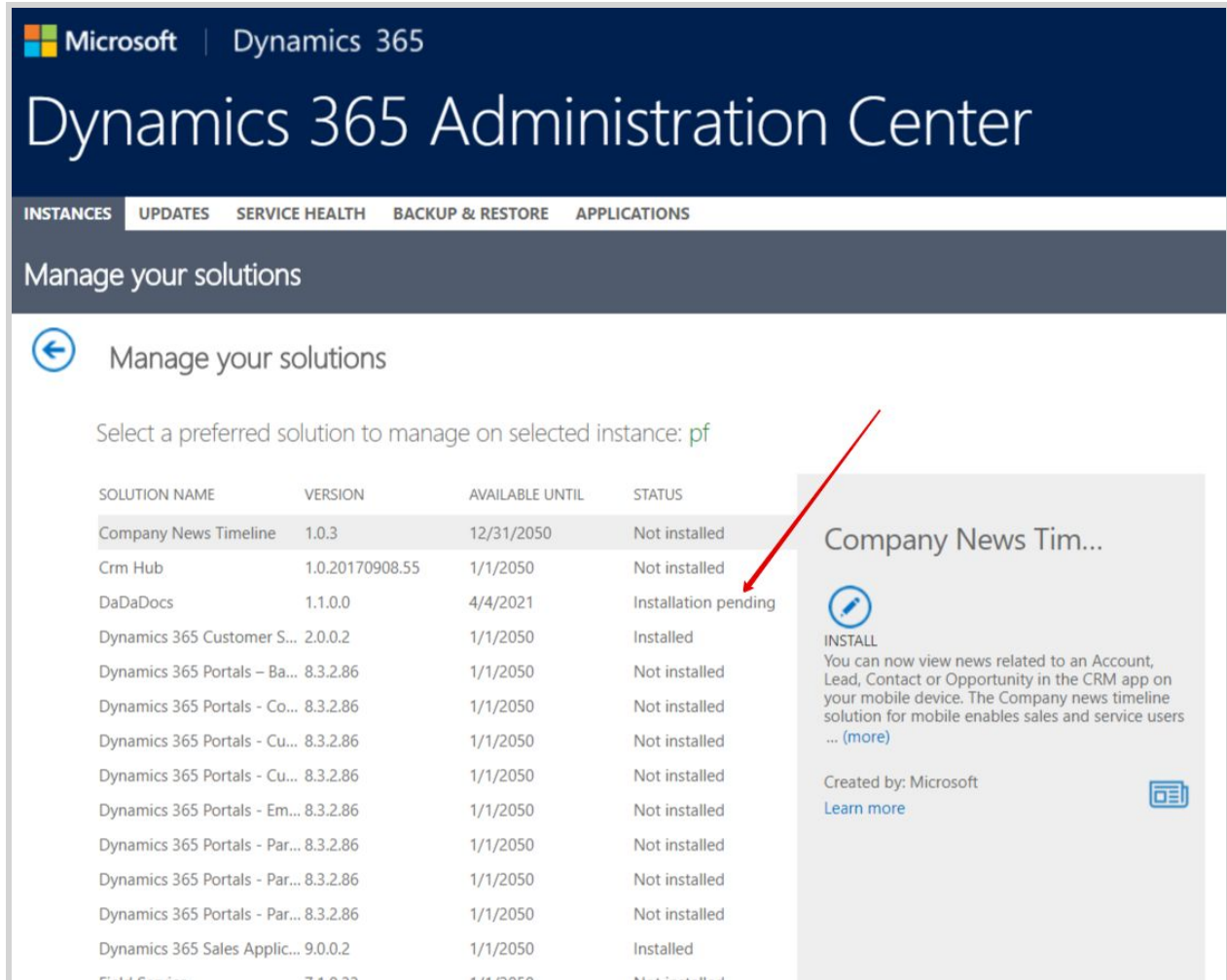
3. Click **Free trial** on the DaDaDocs application page. Read Microsoft Dynamics 365 Terms of use and Privacy policy on the corresponding links and agree to them by ticking the *I give Microsoft permission...* confirmation checkbox. Then click **Continue**.



4. Read Microsoft's Legal Terms and Privacy Statement and another Privacy Statement along with Legal Terms for importing solutions into Dynamics 365 on the corresponding links and agree to them by ticking the corresponding confirmation checkboxes. Then click **Agree**.



The installation process will start.



Microsoft | Dynamics 365

Dynamics 365 Administration Center

INSTANCES | UPDATES | SERVICE HEALTH | BACKUP & RESTORE | APPLICATIONS


Manage your solutions

Manage your solutions


Select a preferred solution to manage on selected instance: pf

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Company News Timeline	1.0.3	12/31/2050	Not installed
Crm Hub	1.0.20170908.55	1/1/2050	Not installed
DaDaDocs	1.1.0.0	4/4/2021	Installation pending
Dynamics 365 Customer S...	2.0.0.2	1/1/2050	Installed
Dynamics 365 Portals - Ba...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Co...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Cu...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Cu...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Em...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Par...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Par...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Par...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Sales Applic...	9.0.0.2	1/1/2050	Installed
Field Service	7.1.0.22	1/1/2050	Not installed

Company News Tim...

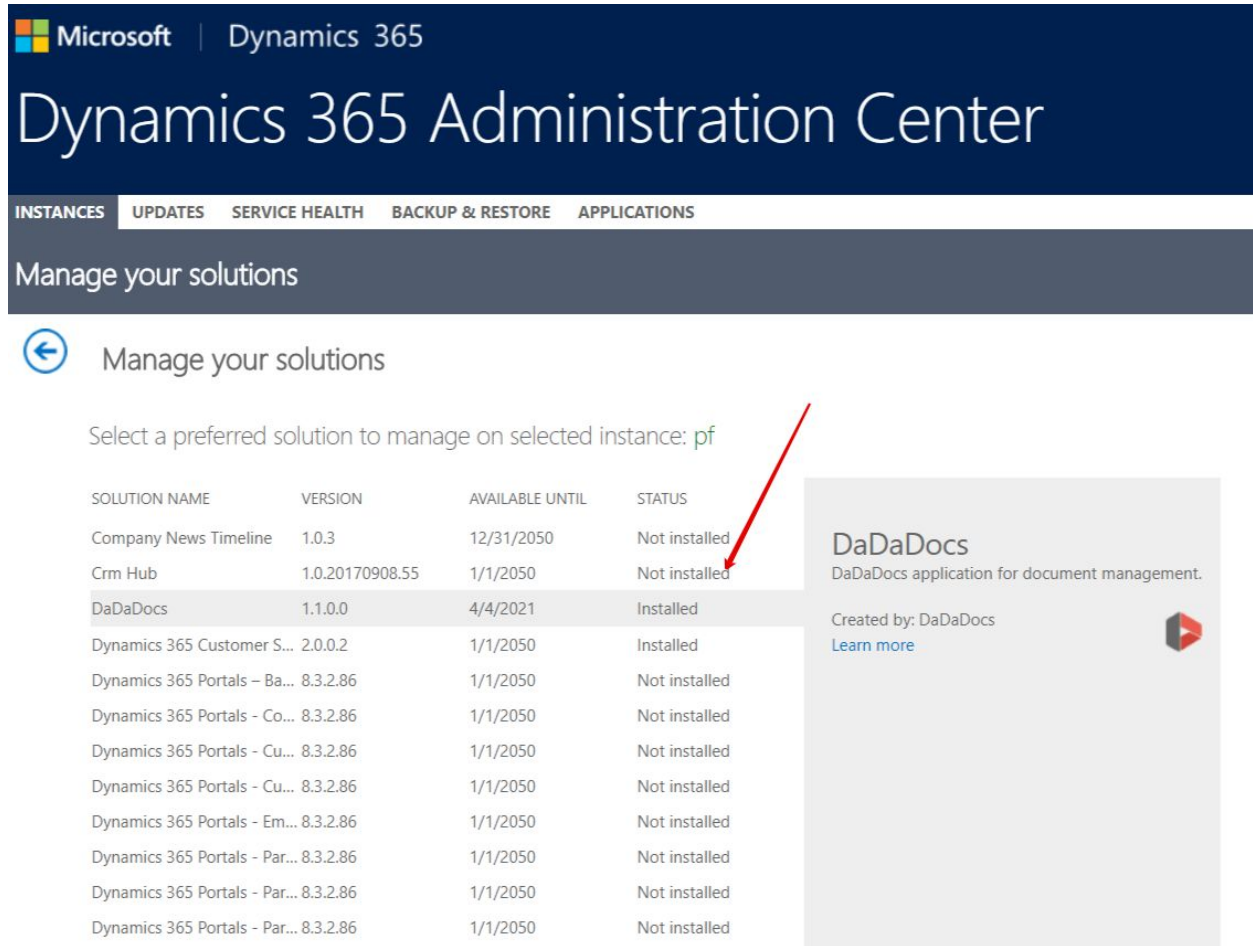
 **INSTALL**

You can now view news related to an Account, Lead, Contact or Opportunity in the CRM app on your mobile device. The Company news timeline solution for mobile enables sales and service users ... [\(more\)](#)

Created by: Microsoft 

[Learn more](#)

Refresh the page after several minutes, the application will be installed.



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Dynamics 365 Administration Center

INSTANCES | **UPDATES** | SERVICE HEALTH | BACKUP & RESTORE | APPLICATIONS

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Dynamics 365 Portals - Cu...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Em...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Par...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Par...	8.3.2.86	1/1/2050	Not installed
Dynamics 365 Portals - Par...	8.3.2.86	1/1/2050	Not installed

DaDaDocs

DaDaDocs application for document management.

Created by: DaDaDocs

[Learn more](#)

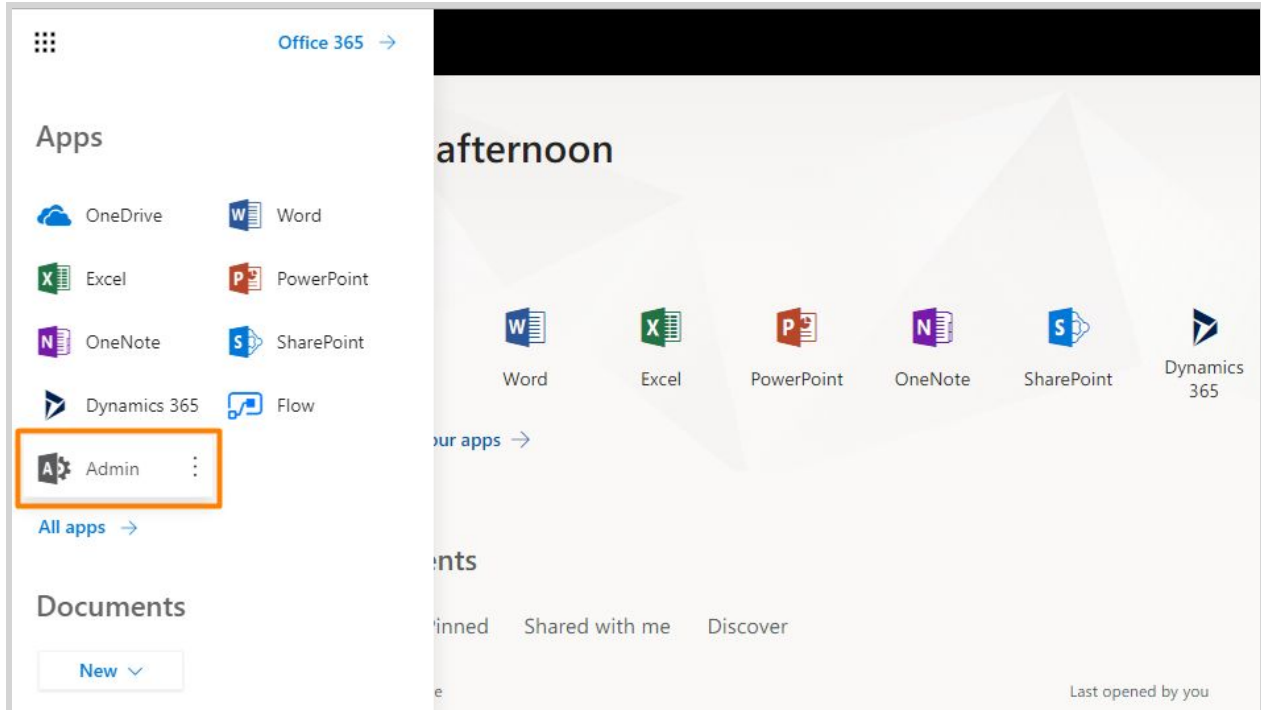
Update to the latest version

Always make sure you're using the latest available version of DaDaDocs for better experience and up-to-date security. To check if there's a later version of DaDaDocs than currently installed and update to that version, follow Dynamics 365 documentation on how to [Manage instances and updates in Dynamics 365 Administration Center](#).

Note: if DaDaDocs hasn't appeared in Applications section of the Administration Center, try refreshing the page.

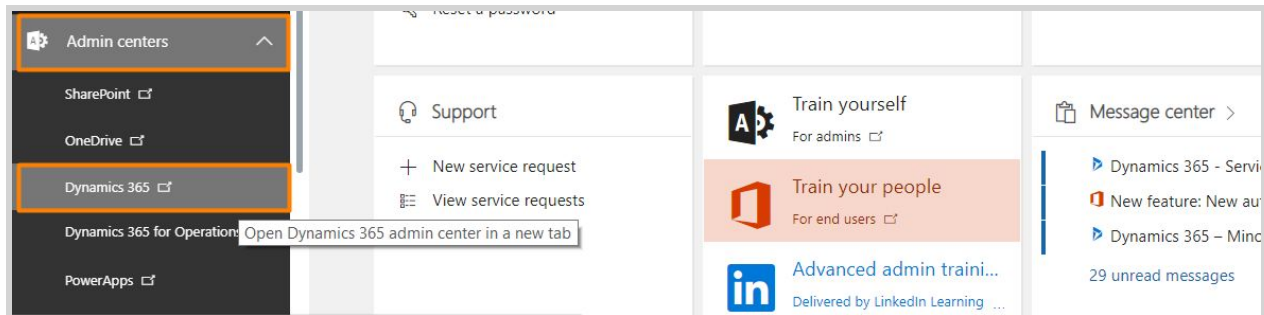
To update DaDaDocs app, [go to Dynamics 365 admin center](#):

1. Sign in to your Office 365 portal, open the app-selector menu and select **Admin**.

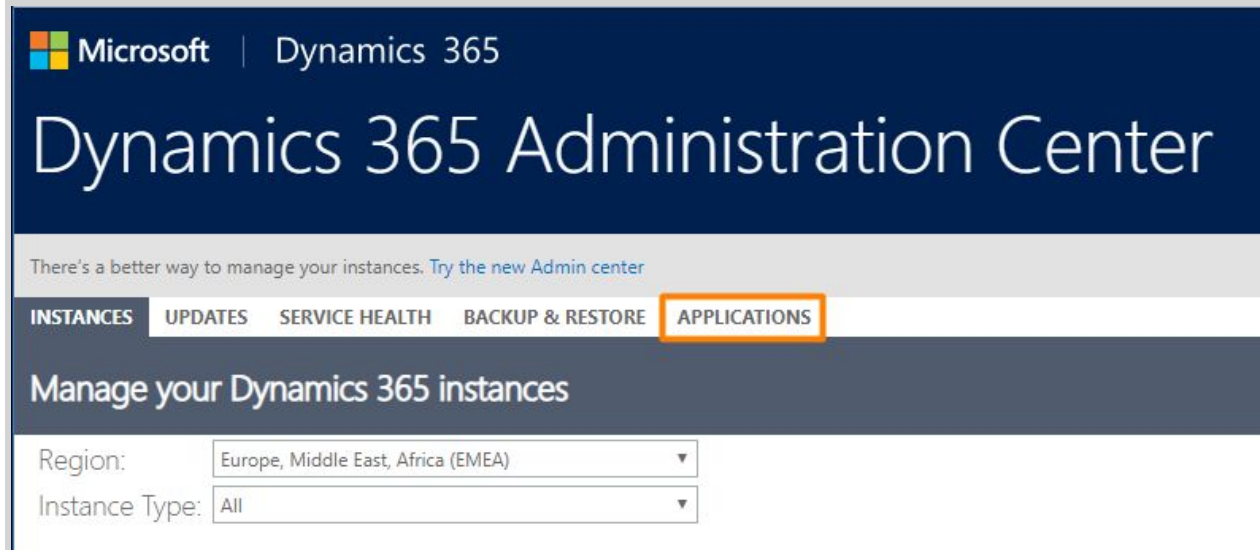


The Home dashboard for Office 365 opens.

2. In the navigation column on the left, expand Admin centers, and then select Dynamics 365.



3. Select the Applications tab to see a list of applications you have installed.



Microsoft | Dynamics 365

Dynamics 365 Administration Center


There's a better way to manage your instances. [Try the new Admin center](#)

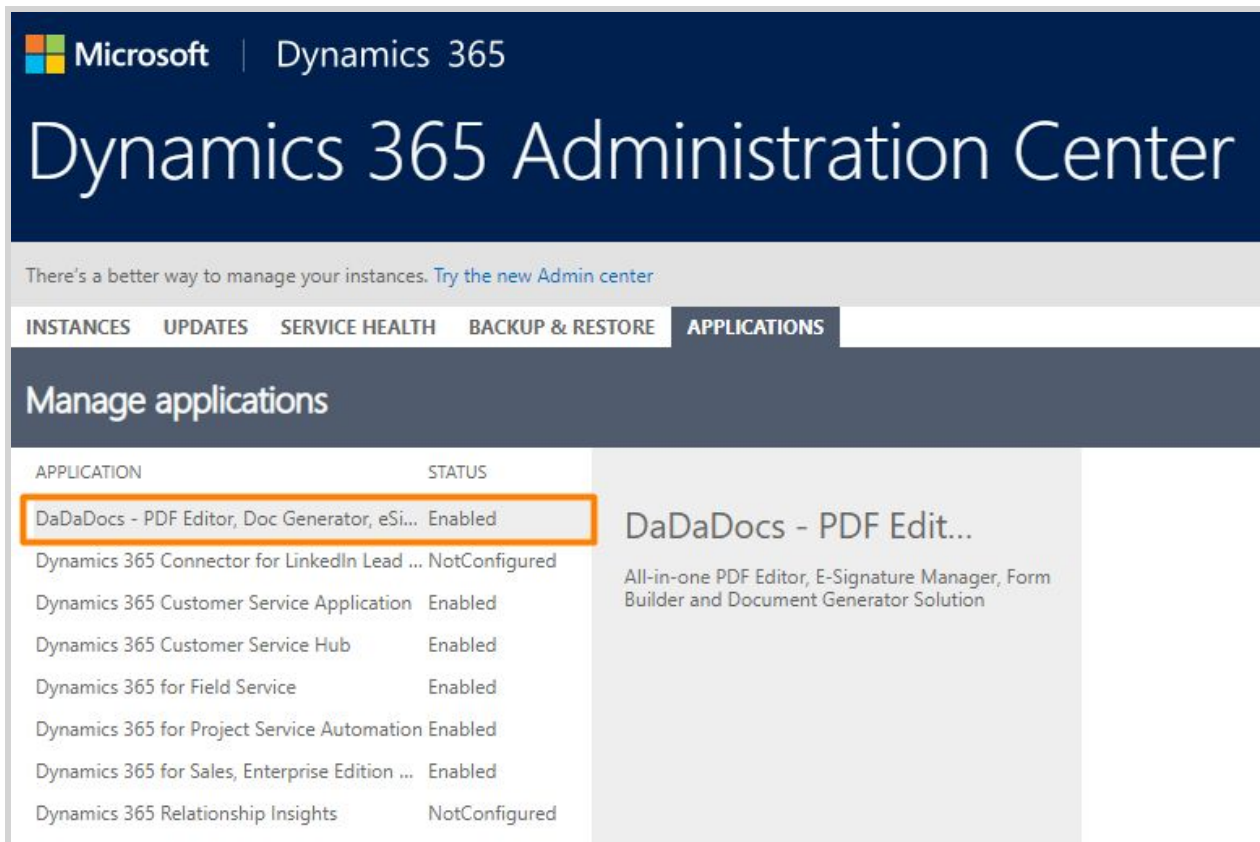
INSTANCES | UPDATES | SERVICE HEALTH | BACKUP & RESTORE | **APPLICATIONS**

Manage your Dynamics 365 instances

Region:

Instance Type:

4. Select DaDaDocs and click the Manage button  in the side panel.



Microsoft | Dynamics 365

Dynamics 365 Administration Center

There's a better way to manage your instances. [Try the new Admin center](#)

INSTANCES | UPDATES | SERVICE HEALTH | BACKUP & RESTORE | **APPLICATIONS**

Manage applications

APPLICATION	STATUS
DaDaDocs - PDF Editor, Doc Generator, eSi...	Enabled
Dynamics 365 Connector for LinkedIn Lead ...	NotConfigured
Dynamics 365 Customer Service Application	Enabled
Dynamics 365 Customer Service Hub	Enabled
Dynamics 365 for Field Service	Enabled
Dynamics 365 for Project Service Automation	Enabled
Dynamics 365 for Sales, Enterprise Edition ...	Enabled
Dynamics 365 Relationship Insights	NotConfigured

DaDaDocs - PDF Edit...

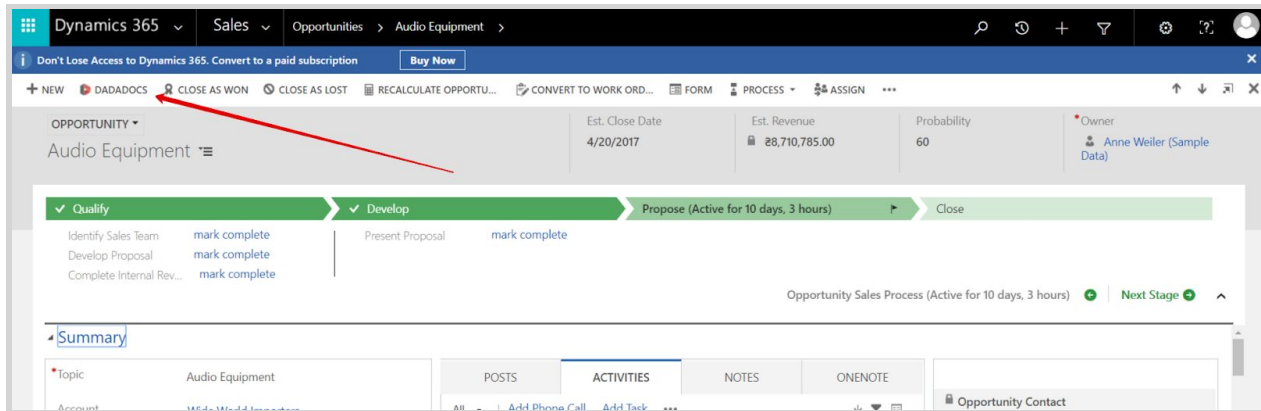
All-in-one PDF Editor, E-Signature Manager, Form Builder and Document Generator Solution

Note! If you don't see this button, contact your administrator to request access permissions.

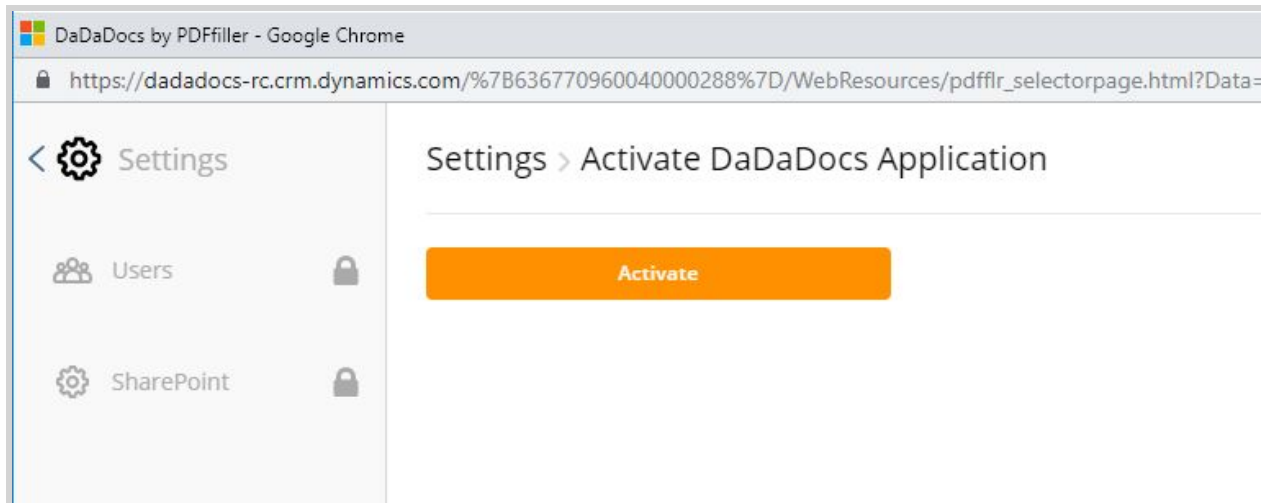
The Marketing setup wizard opens. Look for the **Update packages** button. If the update button isn't shown, then no updates are available and you can just quit the wizard. If the Update packages button is shown, then select it to start the update. The update starts right away, and a page opens to track the progress of the update and will tell you when it's finished.

Activate Administrator Account in DaDaDocs

1. Go to **DaDaDocs** from a Dynamics object.



2. Click **Activate** in the next window.



That's it. Your account has been activated as Administrator of DaDaDocs.

Authenticate user licenses with PDFfiller accounts

To use DaDaDocs, Administrators and organization users should authorize with PDFfiller accounts. Administrators simplify this step for others and grant access to DaDaDocs by authenticating user licenses.

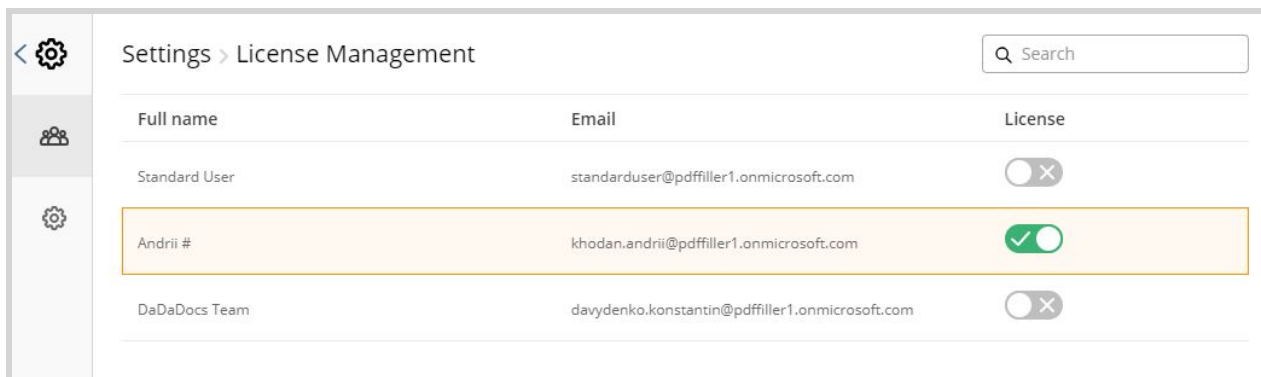
Authenticate user licenses

1. Go to **Settings > Users**.

Note! This tab opens automatically during installation after you [Activate Administrator Account in DaDaDocs](#).

All users of your Dynamics organization are conveniently listed in the table **License Management**.

3. Switch the license toggle to green next to each user you would like to authorize for using DaDaDocs. Don't forget to switch the license toggle for the Administrator as well.



The screenshot shows the 'Settings > License Management' interface. It features a search bar at the top right and a table with three columns: 'Full name', 'Email', and 'License'. The table lists three users: 'Standard User', 'Andrii #', and 'DaDaDocs Team'. The 'Andrii #' row is highlighted in yellow, and its license toggle is turned on (green). The other two rows have their license toggles turned off (grey).

Full name	Email	License
Standard User	standarduser@pdfiller1.onmicrosoft.com	<input type="checkbox"/>
Andrii #	khodan.andrii@pdfiller1.onmicrosoft.com	<input checked="" type="checkbox"/>
DaDaDocs Team	davydenko.konstantin@pdfiller1.onmicrosoft.com	<input type="checkbox"/>

All designated users now have DaDaDocs access. No registration or PDFfiller credentials required.

All done. Now you can move on to configuring **Options** and connecting with SharePoint.

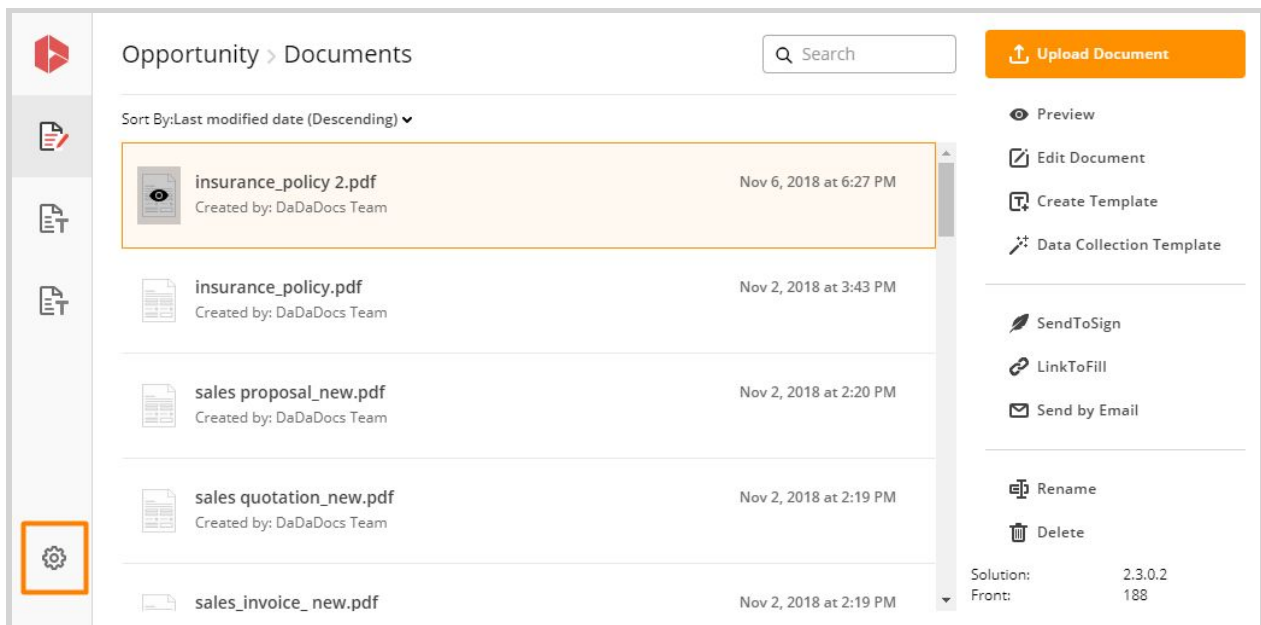
Connect DaDaDocs with SharePoint

DaDaDocs works with two sources for your documents: SharePoint and Notes section in the Dynamics records. By default DaDaDocs works with documents attached in Notes. Apply the DaDaDocs app to your SharePoint documents within your Dynamics 365 account.

Note: Keep the documents that can be accessed by DaDaDocs in a separate SharePoint folder.

To connect DaDaDocs to SharePoint, go to **Settings** in DaDaDocs.

Note: SharePoint credentials are required to start the process.



The screenshot displays the DaDaDocs interface for an 'Opportunity > Documents' view. The interface includes a search bar, a sort dropdown set to 'Last modified date (Descending)', and a list of documents. The first document, 'insurance_policy 2.pdf', is highlighted. The left sidebar contains a settings gear icon highlighted with an orange box. The right sidebar shows various actions like 'Preview', 'Edit Document', 'Create Template', 'Data Collection Template', 'SendToSign', 'LinkToFill', 'Send by Email', 'Rename', and 'Delete'. At the bottom right, the solution version is 2.3.0.2 and the front version is 188.

Document Name	Created by	Modified Date
insurance_policy 2.pdf	DaDaDocs Team	Nov 6, 2018 at 6:27 PM
insurance_policy.pdf	DaDaDocs Team	Nov 2, 2018 at 3:43 PM
sales proposal_new.pdf	DaDaDocs Team	Nov 2, 2018 at 2:20 PM
sales quotation_new.pdf	DaDaDocs Team	Nov 2, 2018 at 2:19 PM
sales_invoice_new.pdf		Nov 2, 2018 at 2:19 PM

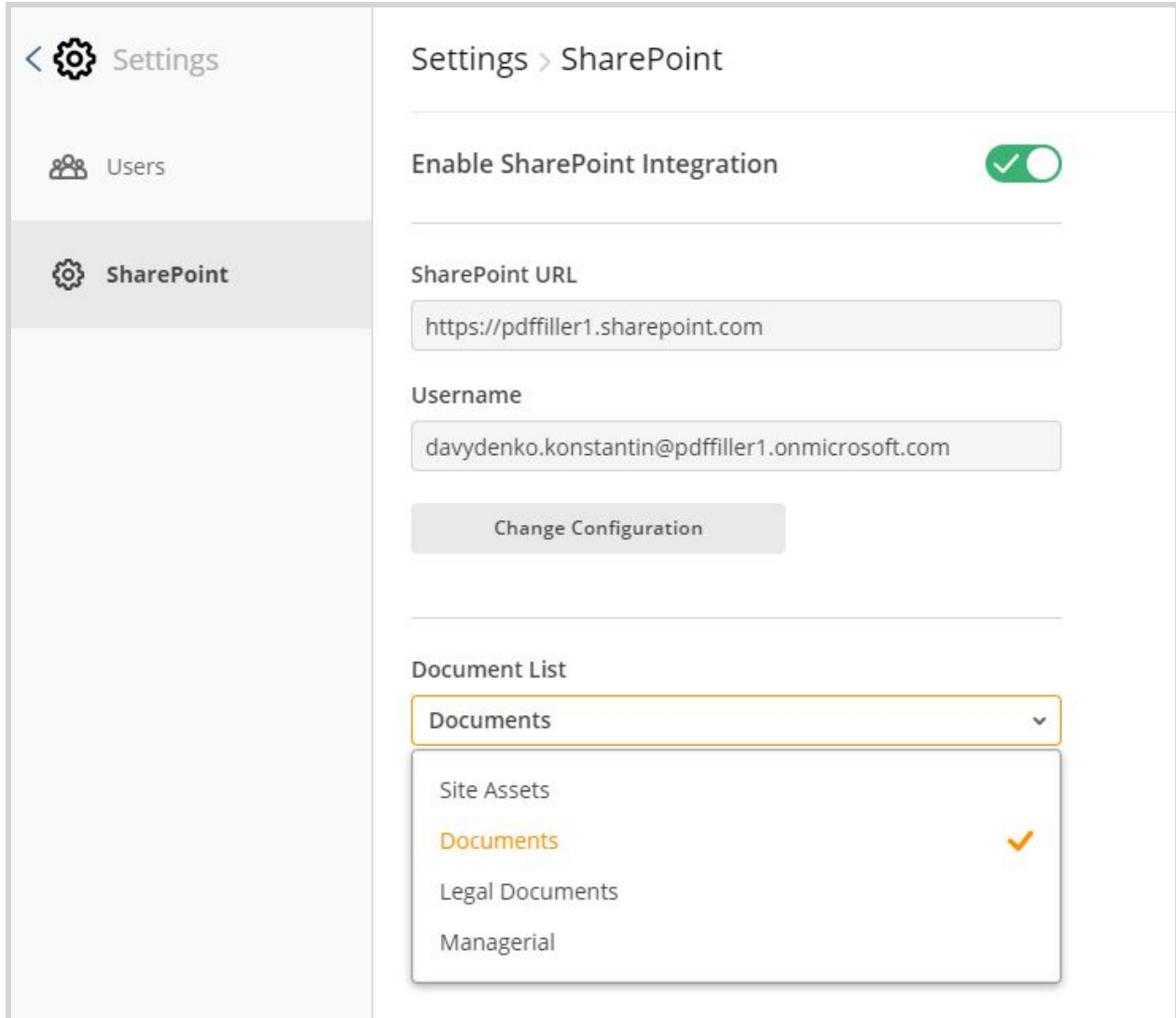
Go to **SharePoint** tab. Enter your credentials for SharePoint account.

The screenshot shows the 'Settings > SharePoint' configuration page. On the left is a navigation sidebar with 'Settings', 'Users', and 'SharePoint' (selected). The main content area includes a toggle for 'Enable SharePoint Integration' (checked), input fields for 'SharePoint URL' (with an example), 'Username', and 'Password', a 'Connect' button, a 'Document List' dropdown (set to 'Documents'), and a 'Folder' selection button labeled 'Select Sharepoint Folder'.

Under **SharePoint URL**, enter the URL for your SharePoint storage.

Enter the username and password.

Click **Connect**.



The screenshot shows the 'Settings > SharePoint' configuration page. On the left is a navigation menu with 'Settings', 'Users', and 'SharePoint' (selected). The main content area includes a toggle for 'Enable SharePoint Integration' which is turned on. Below this are input fields for 'SharePoint URL' (https://pdffiller1.sharepoint.com) and 'Username' (davydenko.konstantin@pdffiller1.onmicrosoft.com). A 'Change Configuration' button is located below the username field. At the bottom, there is a 'Document List' dropdown menu with 'Documents' selected and a checkmark, and other options like 'Site Assets', 'Legal Documents', and 'Managerial' are visible.

Under **Document List** select the source for your files.

Under **Folder**, select the SharePoint folder you'd like to connect with DaDaDocs.

If you want to set a different username and password later, click **Change Configuration**.

Delete DaDaDocs app

Browse to the [Office 365 admin center](#) and sign in using Office 365 Global administrator credentials.

1. Click Admin centers, then select Dynamics 365.

2. Choose the Applications tab.
3. Select DaDaDocs, and then click Delete.