eSignAnyWhere

Integration for
Microsoft Dynamics® CRM
Installation Guide

Last Updated: August 15, 2017

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Overview

eSignAnyWhere offers a plug-and-play integration solution with
Microsoft Dynamics Crm. This integration provides the following benefits:

- Accelerates the quote-to-cash process by sending envelopes—such as contracts and sales documents—from Dynamics with one click.
- Automatically merges data from Dynamics entities—such as accounts and contacts—into envelopes and pushes data gathered from signers during the signing process back 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 both Microsoft Dynamics CRM Online deployments and Microsoft Dynamics CRM on-premises deployments.

Installing and Configuring the eSignAnyWhere Solution

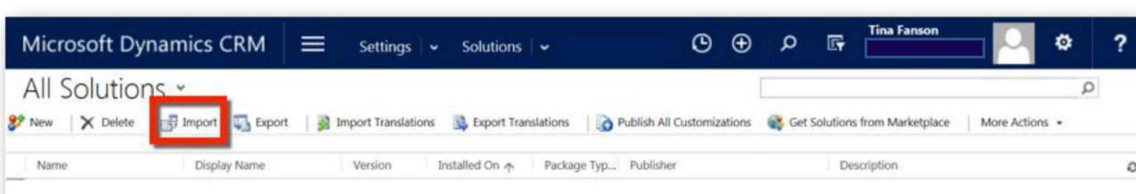
If you are installing the eSignAnyWhere solution for the first time, you must complete the steps in both the Installing the eSignAnyWhere Solution and Configuring the eSignAnyWhere Solution sections. If you are upgrading/updating, you must complete only the steps in the Installing the eSignAnyWhere Solution section.

Warning: If you are upgrading/updating, do NOT uninstall your previous package. Doing so deletes the pointers to all your previously signed envelopes.

Installing the eSignAnyWhere Solution

To install the integration solution package, please do the following:

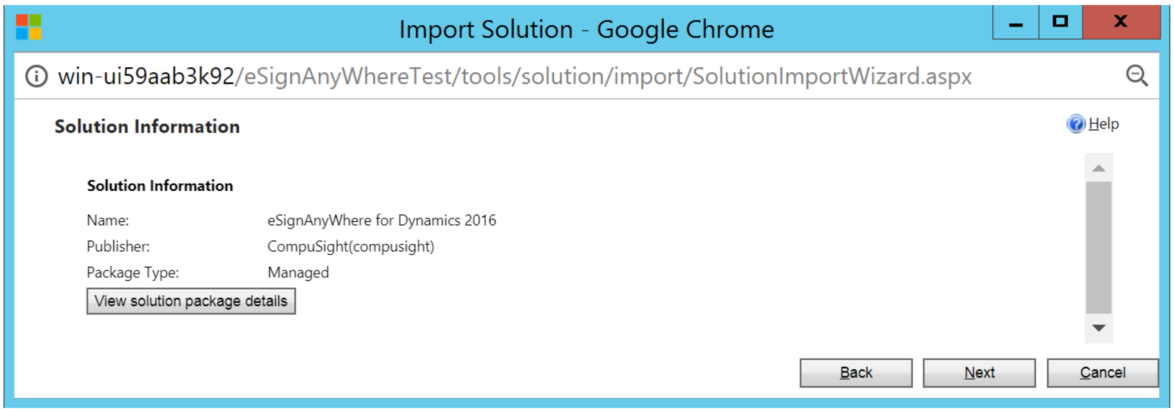
1. Log on to your Microsoft Dynamics CRM account.
2. From the Dynamics Main Menu, select the **Settings** tile then click **Solutions** (under Customizations).
3. On the Action toolbar, click **Import**.



4. In the *Select Solution Package* dialog, click **Browse**, select the appropriate compressed file (new install or update/upgrade), then click **Next**.

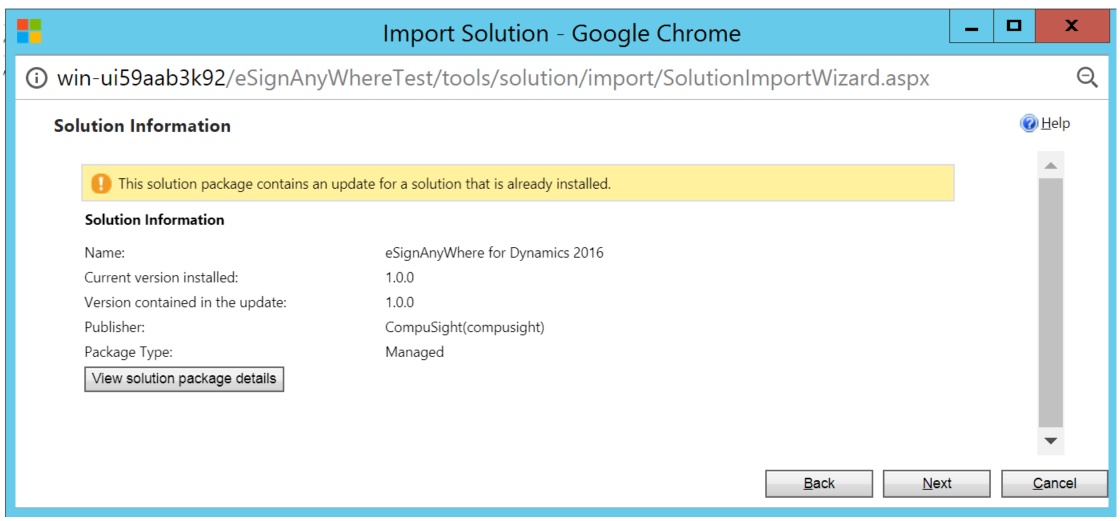
5. In the *Solution Information* dialog, do one of the following:

   a) If you are installing for the first time, click **Import**.

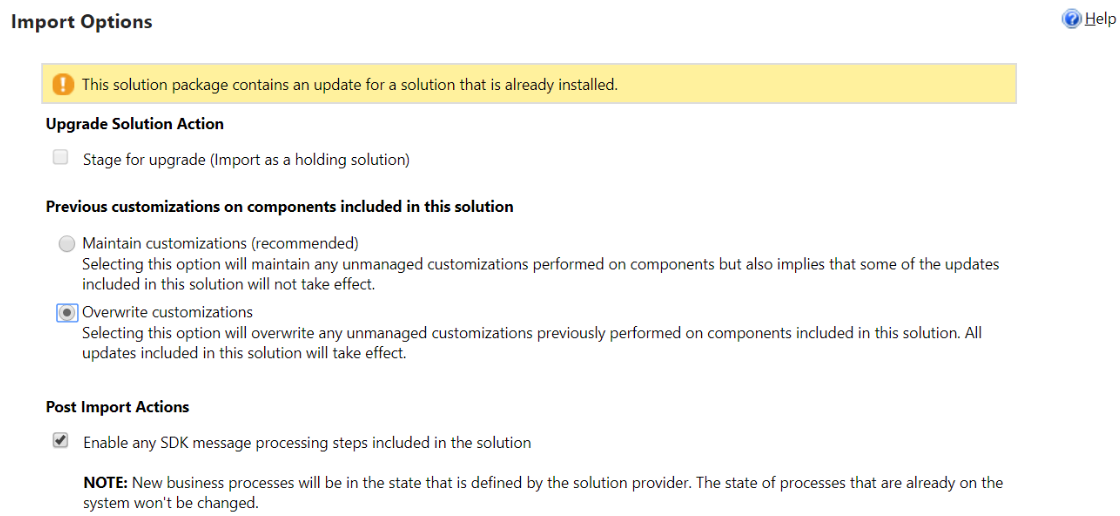


   b) If you are upgrading/updating, do the following:

      i) In the *Solution Information* dialog, click **Next**.

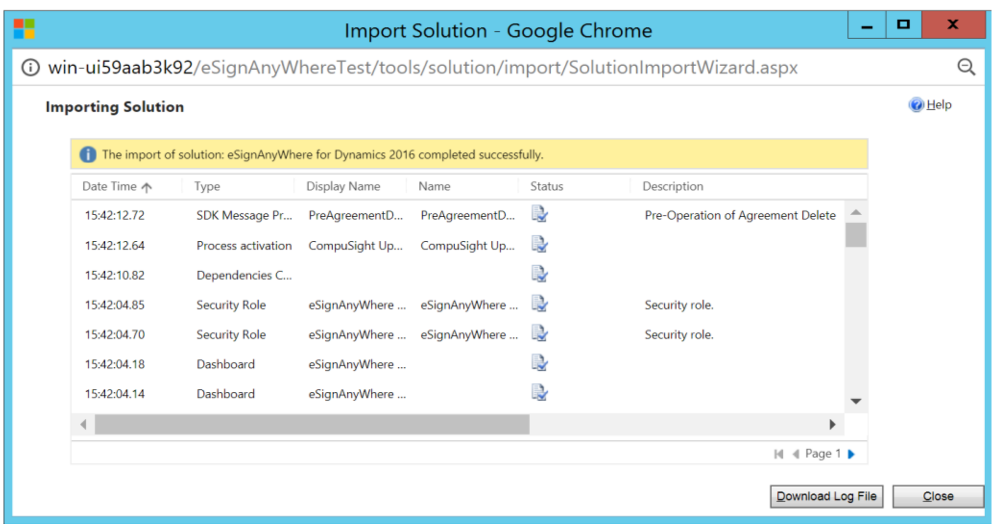


ii) In the *Import Options* dialog, select an option for your customizations then click **Import**.

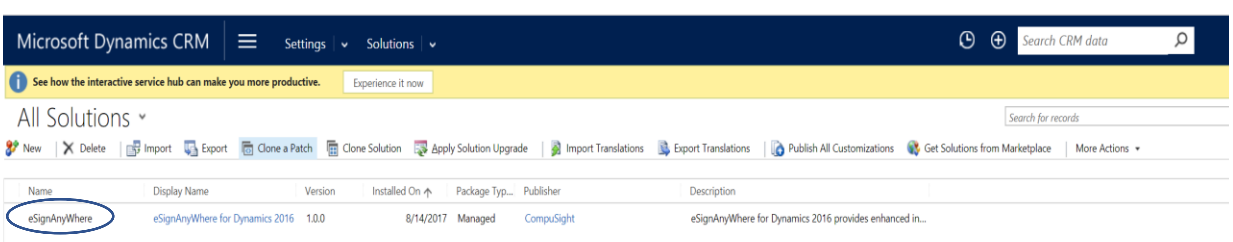


The import can take a few minutes.

6. When the import completes, the *Importing Solution* dialog displays. Click **Close**.



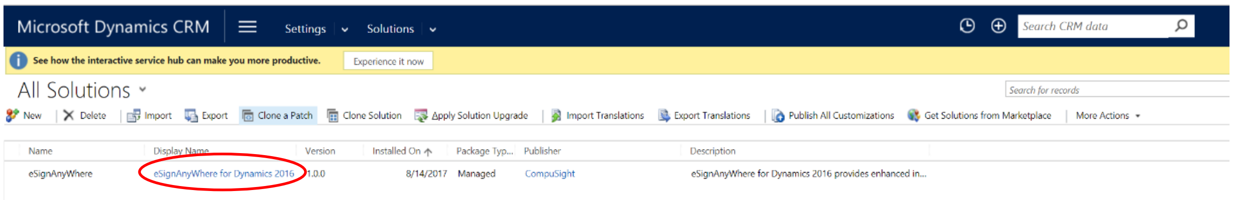
The All Solutions page redisplays. If you have installed for the first time, **eSignAnyWhere** now displays in your list of solutions. If you have upgraded/updated to a new version, the new version number displays, but the original 'Installed On' date remains the same.



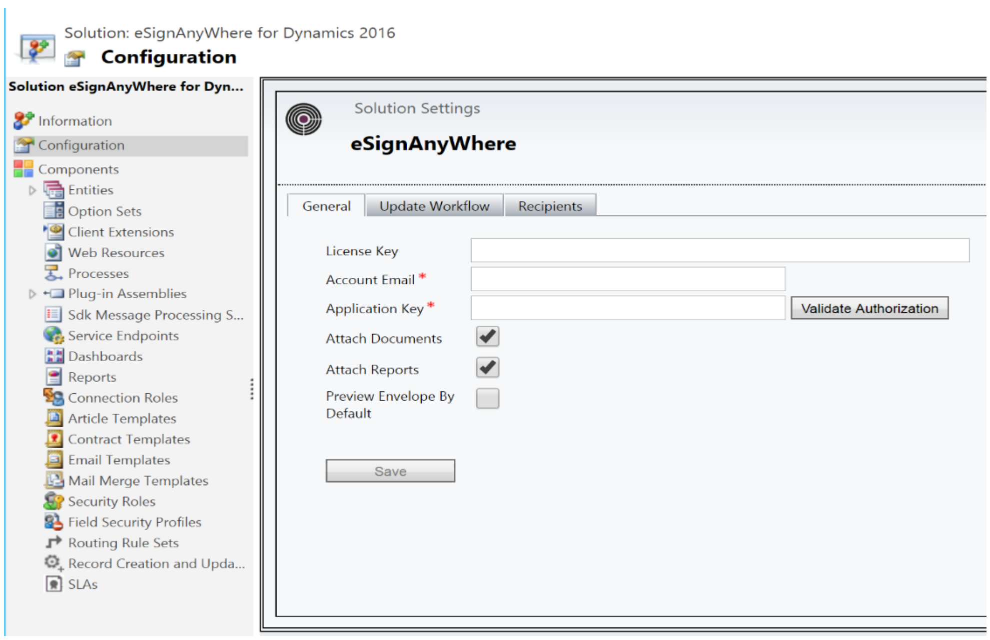
Configuring the eSignAnyWhere Solution

If you are installing for the first time, you must complete the following steps:

1. If you are not on the *All solutions* page, from the Dynamics Main Menu, select the **Settings** tile then click **Solutions** (under Customizations).
2. Click the **eSignAnyWhere for Dynamics (version)** link to open *Solution Settings*.



3. In *Solution Settings*, do one of the following:
   - **First Time Installation**—Enter your License Key, Account Email (can be found here) and the Application Key also found on the Significant portal (used to talk to Significant api)
   - **Upgrade Installation**—Verify that the License Key, Account Email and the Application Key are correct.



4. Click **Validate Authorization**. The success message appears next to the Save button if validation is successful.

5. Enable *Attach Documents* and *Attach Reports* as required by your organization's business processes. These options function as follows:
   - **Attach Documents**—Allows users to upload documents from their computer when using the **Send for Signature** option.
   - **Attach Reports**—Enables the **Send Report for Signature** option, which allows users to attach reports during the signature workflow. To use this option, SQL Server Reporting Services (SSRS) must be installed and configured.

6. Click **Save** to save your configuration values.

7. Click Close (Close) in the upper left-hand corner to close *Solution Settings*.

Testing the Installation

After installing the solution package, we recommended that someone test the solution before a Microsoft CRM System Administrator makes it widely available to other Dynamics CRM users. At a minimum, the following should be done:

- CRM System Administrator assigns the required eSignAnyWhere role or roles to the tester: eSignAnyWhere User, eSignAnyWhere Admin
- Tester completes his or her eSignAnyWhere user profile (First Time Installations Only)
- Tester sends an envelope for signature
- Tester checks envelope status

Deploying Solution to Additional Users Using Roles

If the integration solution package has been installed for the first time, a Microsoft Dynamics CRM System Administrator must make it available to users within the organization by assigning the appropriate roles to those users.

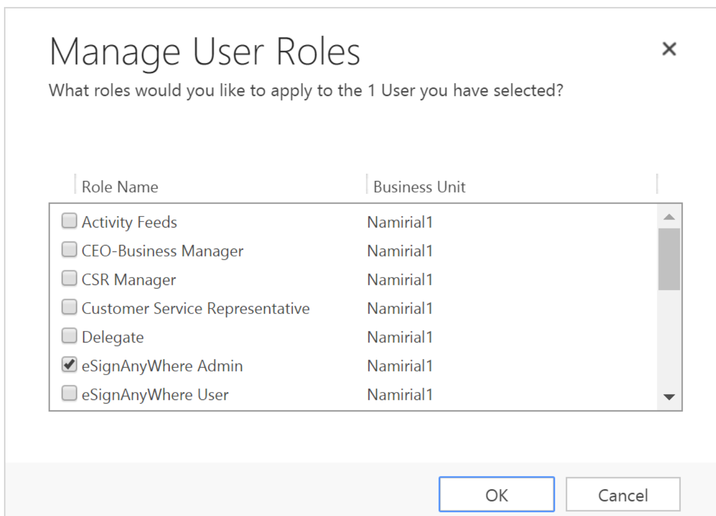
After users have been assigned the appropriate roles, they must complete their User profiles before they can send documents for signature

1. Log on to your Microsoft Dynamics CRM account.
2. From the Dynamics Main Menu, select the **Settings** tile then click **Security** (under Customizations).
3. Click **Users**.

   The *Enabled Users* page displays.

4. In the *Enabled Users* page, select one or more users then click **Manage Roles**.

5. In the *Manage User Roles* dialog, enable the appropriate eSignAnyWhere role or roles (eSignAnyWhere Admin or eSignAnyWhere User).



6. Click **OK** to save your changes.

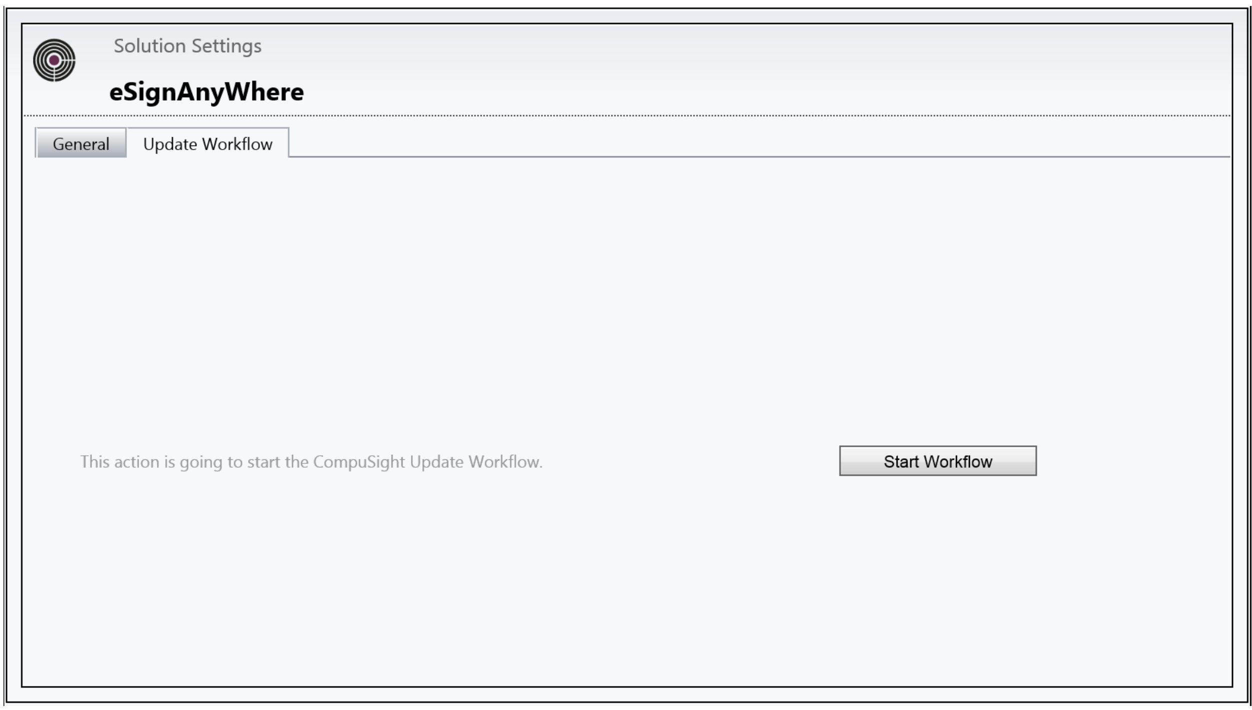
Configuring Automatic Status Updates

The eSignAnyWhere integration solution can be configured to receive automatic status updates.. Once configured, envelopes sent from Dynamics CRM are automatically updated when the status of these envelopes changes (e.g., envelope is completed). This eliminates the need for users to manually refresh the status of the envelopes sent for signature.

Configuring the eSign Services Solution for Automatic Status Updates

To configure automatic status updates for eSignAnyWhere, do the following:

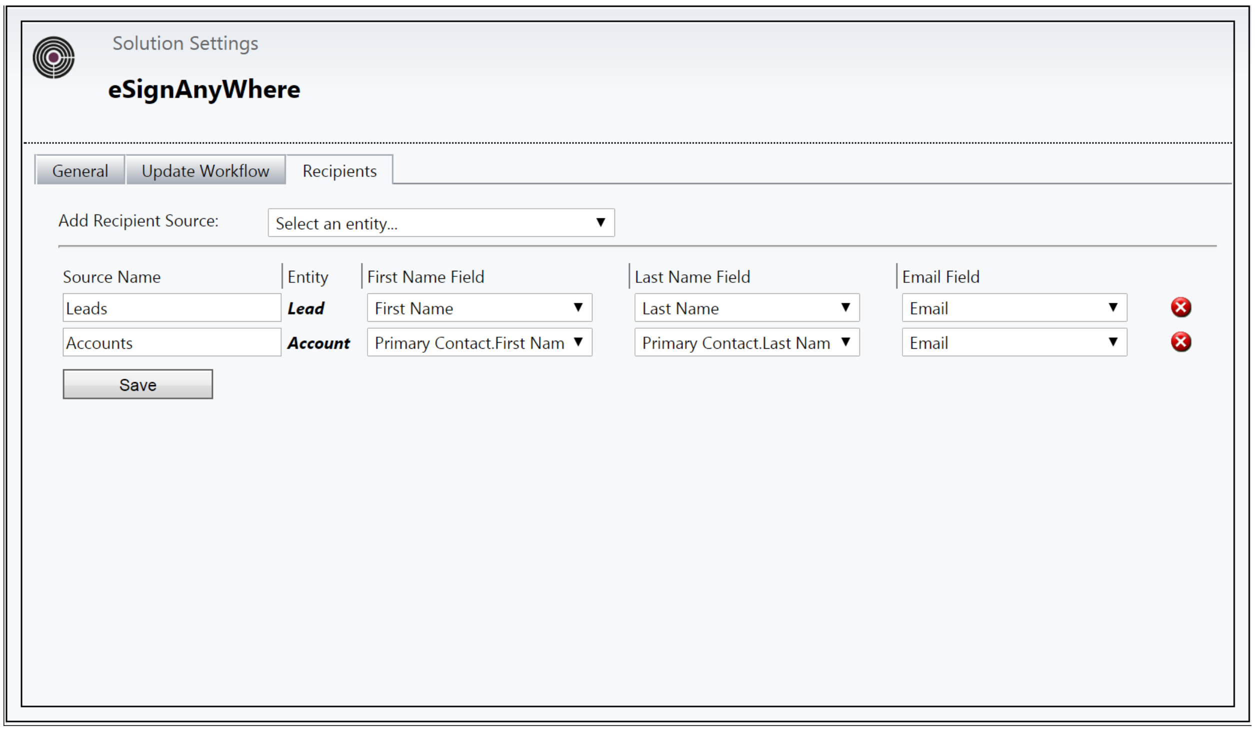
1. Log on to your Microsoft Dynamics CRM account.
2. From the Dynamics Main menu, select the **Settings** tile then click **Solutions** (under Customizations).
3. Click the **eSignAnyWhere for Dynamics (version)** link to open Solution Settings.
4. Open solution configuration page and select the Update Workflow tab



This will start the Update workflow and its status can be tracked using the built-in Processes UI provided by the Dynamics Crm itself.

Recipient Sources

For a recipient source we must select the entity to be the source. After selecting an entity all the attributes load up (together with related entities and their attributes). Every recipient must have first name, last name and email so selecting a field for each of these is a necessity. Source name is what will appear in the Add Recipients dialog that will be used when sending an Envelope later on. Also, when sending an envelope from an entity that has a source defined (saved) that entity record will be addded automatically to the envelope recipients list.



Mapping Data between Dynamics & Namirial

The eSignAnyWhere services integration with Microsoft Dynamics CRM supports bidirectional mapping of data between Dynamics CRM and eSignAnyWhere services. This is a very powerful feature that allows CRM System Administrators to dynamically populate envelopes with information from Dynamics CRM (CRM -> Namirial mappings) or transfer information gathered during the eSignAnyWhere signature process (Namirial -> CRM mappings). Mapping ensures data consistency within the signature process. The data mapping options are as follows:

- **CRM -> Namirial** —Allows you to map the attributes of a CRM entity to the fields within an eSignAnyWhere envelope. When the mapping is used, data from CRM is merged into the envelope being sent. For example, you can map the data associated with the account entity, such as the account number and account address, into an envelope you are sending. Each mapping is associated with a document type. You can create multiple document types (mappings) for a single CRM entity. You can then specify a default document type for that entity. Users can override this default when sending envelopes for signature.

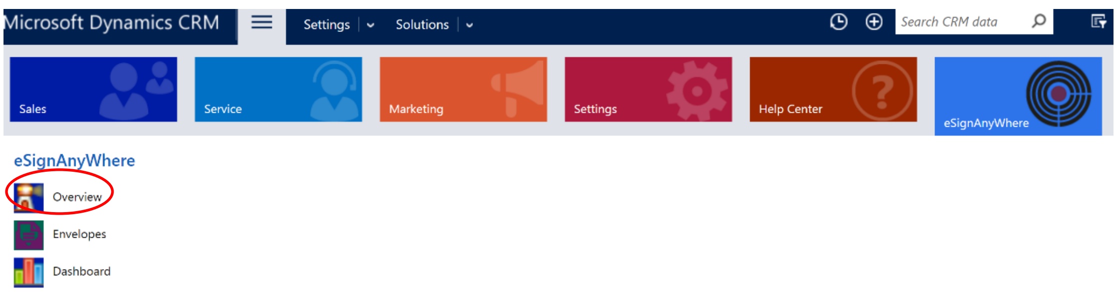
- **Namirial -> CRM** —Allows you to map envelope data gathered from the signer during the signing process back into CRM. For example, you can gather a PO number from the signer then map that information into the PO number field in CRM. As with CRM -> Namirial mappings, you can create multiple document types (mappings) then specify one as the default.

You must be an eSignAnyWhere Admin to create data mappings. As you define mappings between attributes of CRM entities and document fields, you can save and select them when users send documents for signature.

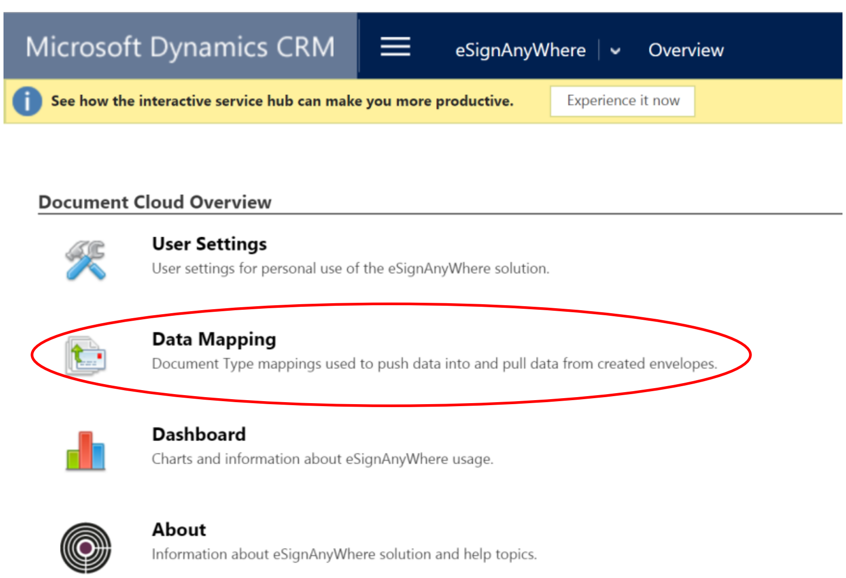
Creating Data Mappings for an Entity

The Data Mapping link appears only after the user has an eSignAnyWhere Admin security role. Before you create your mappings, you should determine what types of data mappings are required then review your envelopes to determine how Dynamics CRM data can be mapped to the form fields in those envelopes and what data should be gathered during the signing process and mapped back into Dynamics.

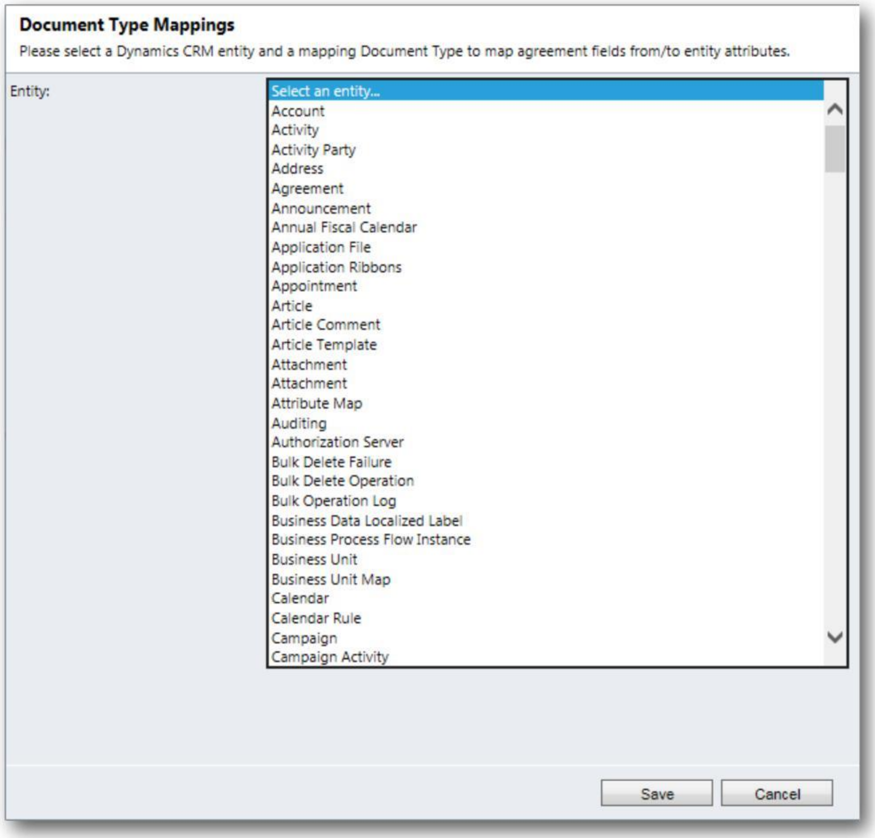
1. Log on to your Microsoft Dynamics CRM account.
2. From the Dynamics Main menu, select the **eSignAnyWhere** tile then click **Overview**.



3. Under Document Cloud Overview, click the **Data Mapping** link.



4. In the Document Type Mappings dialog, select a CRM Entity.



5. Depending on whether there are or are not document types for this entity, do one of the following:

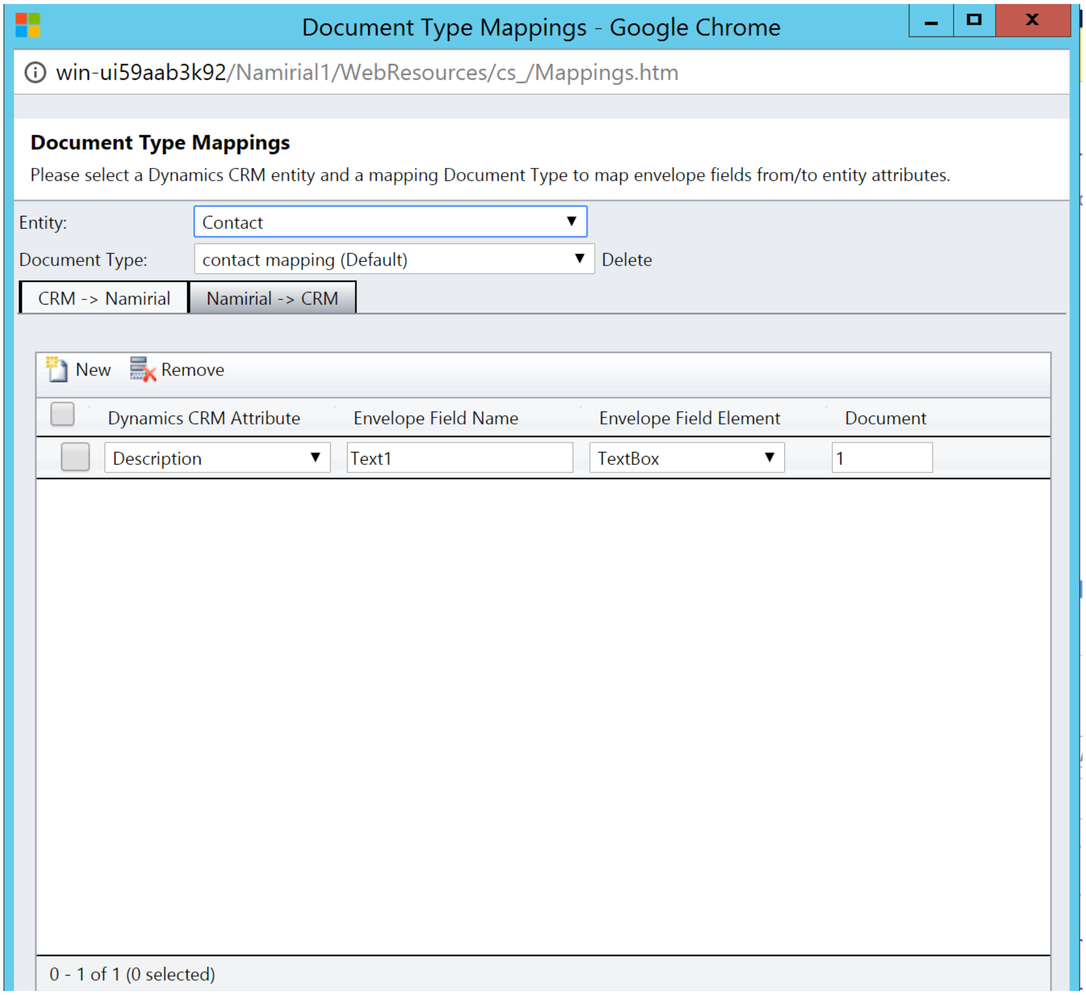
   a) If there are no document types defined for the selected entity, enter a name for the Document Type then click **Save** to create it.

      Note: When you create the first document type for an entity it becomes the default document type.

   b) If there is at least one document type defined for the selected Entity, the mapping for the default document type displays. It can be edited or deleted. You can use the Document Type drop-down to access other existing document types, which can then be edited, deleted, or set as the default.

You can also use the Document Type drop-down to 'Create a new document type

6. **Crm -> Namirial** mapping definition needs 3 things: Dynamics attribute, envelope field name, Field type and Document number.



7. **Namirial -> Crm** needs also the envelope field name, dynamics crm attribute, document number but also has an Override column which if checked overrides the dynamics crm field value (if it exists) while mapping is taking place.

Setting the Default Document Type for an Entity

As the eSignAnyWhere Admin, you can define multiple document types for a single Dynamics CRM entity and set one to be default.
The default document type for an entity is automatically used when users send a document from that Entity. However, if multiple document types exist for the entity, users can select another.