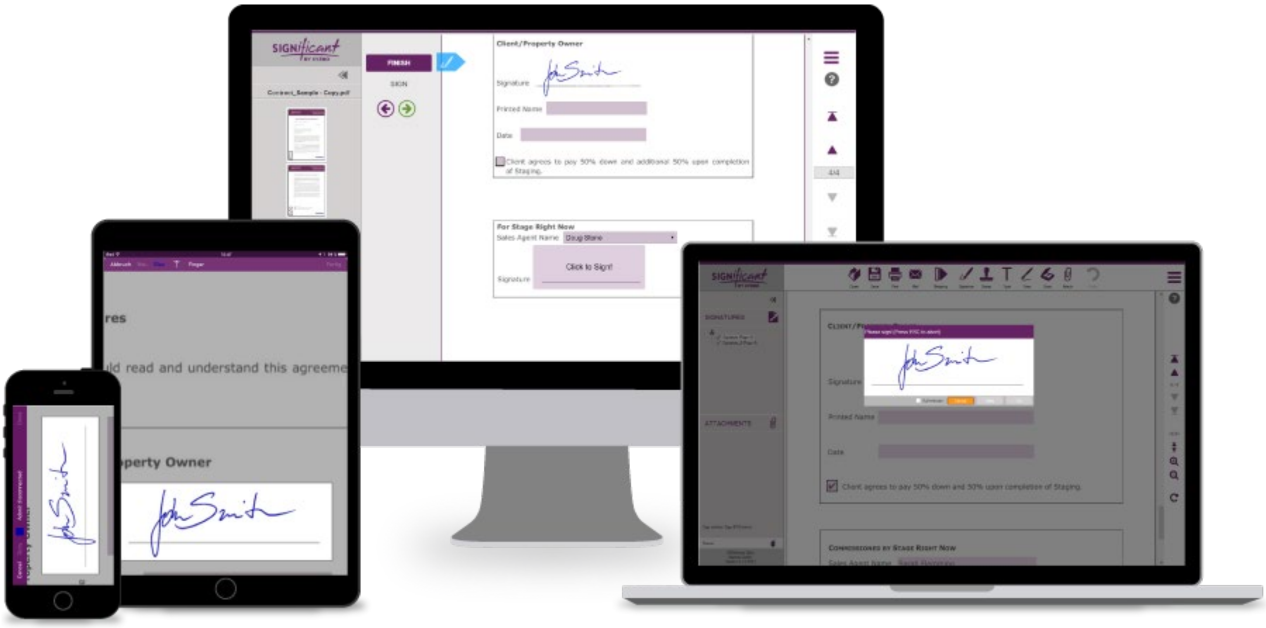
eSignAnyWhere Integration forMicrosoft Dynamics® CRM

User Guide



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1. 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.

2. Installing and Configuring eSignAnyWhere

The eSignAnyWhere integration solution package can only be installed by a Microsoft Dynamics CRM System Administrator. Please contact your CRM System Administrator to determine if the package has already been installed.

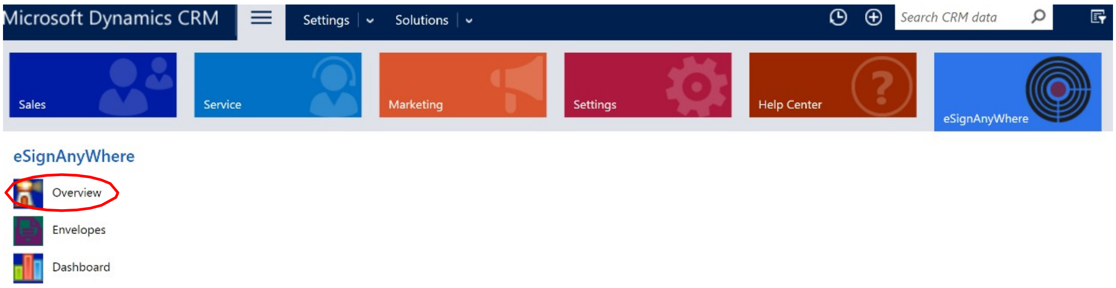
3. Completing Your eSignAnyWhere User Profile

Before you can send documents for signature from Microsoft Dynamics CRM, you must complete your user profile.

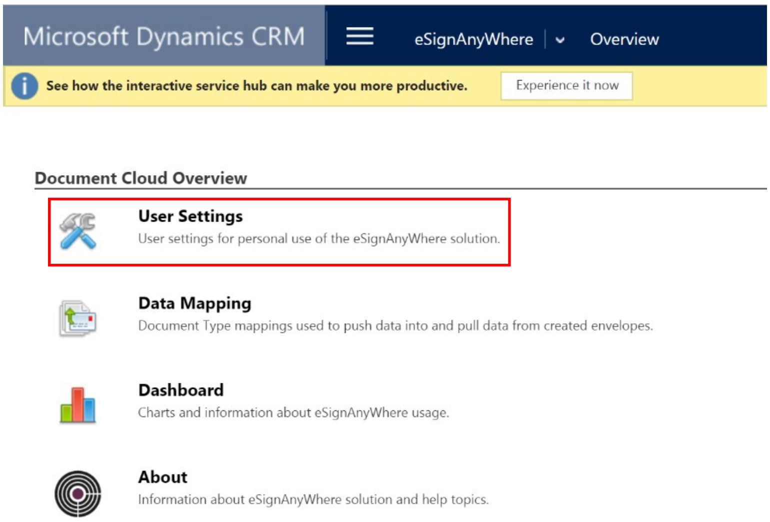
1. Sign On to Dynamics CRM. Your Microsoft Dynamics CRM dashboard displays.

Note: Your particular dashboard view is dependent on your assigned user role. The various panes in the dashboard are empty if your CRM System Administrator has just installed your package solution for the first time.

2. From the Dynamics Main menu, select the **eSignAnyWhere** tile then click **Overview**.

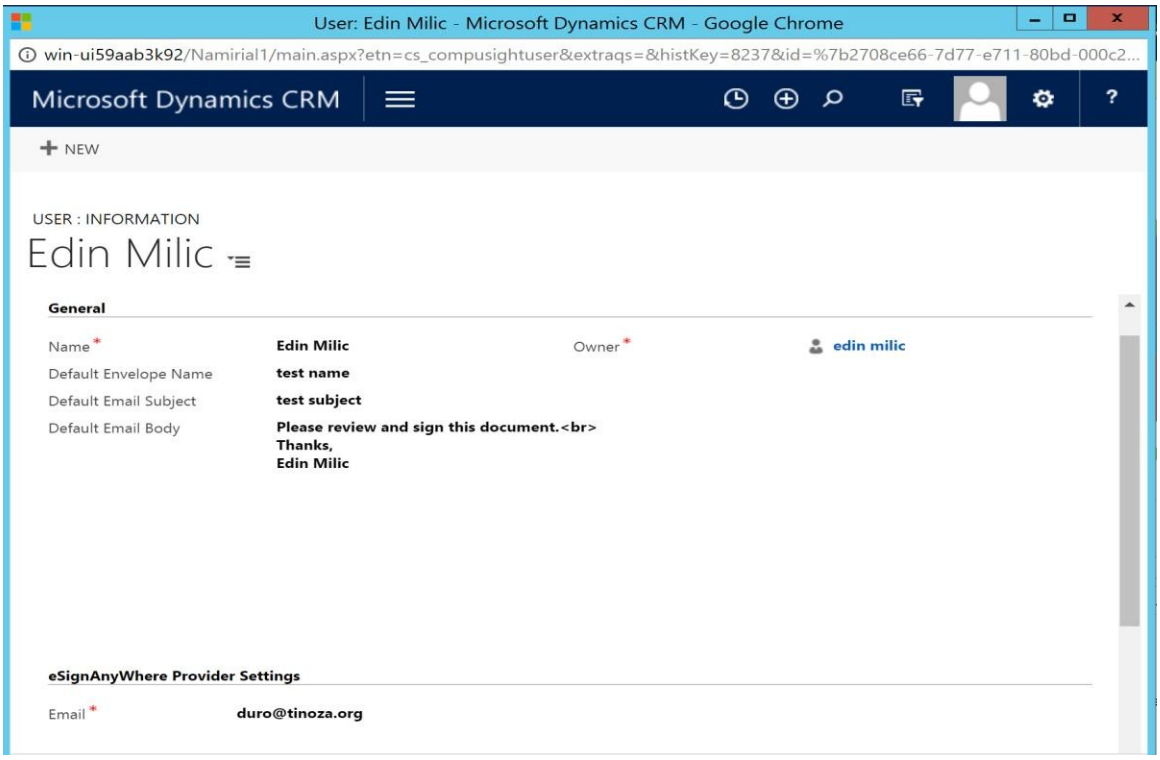


3. Under Document Cloud Overview, click the **User Settings** link.



4. In the New eSignAnyWhere User page, click in the following fields to update them as required:

- **Name**—Enter the name of the eSignAnyWhere User Profile.
- **Default Envelope Name** - The default envelope name used when you send envelopes. It can be overridden.
- **Default Email Subject** - The default email subject used when you send envelopes. It can be overridden.
- **Default Email Body** – The default email body used when sending the envelopes. Can have html tags



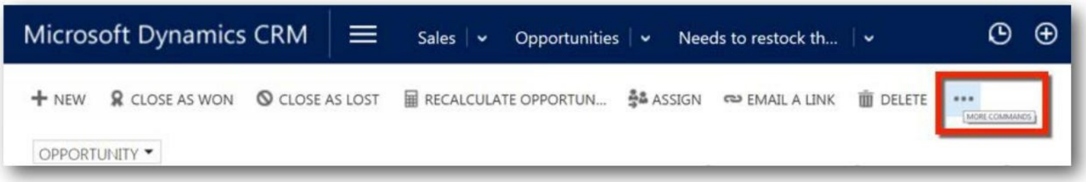
5. In the eSignAnyWhere Provider section enter an email that will appear as a sender email for the envelopes
6. Click **Save & Close** <u>even if you have not changed any information</u>. Doing so validates (if the user exists on the Namirial side) or creates a new user (if the user is not present on the Namirial side).
7. If there is no error message the record gets saved and the user profile is created. Every time this user sends the envelope his/her email address entered in the eSignAnyWhere provider section will be taken and user for the Authentication agains the significant API.

4. Sending for Signature

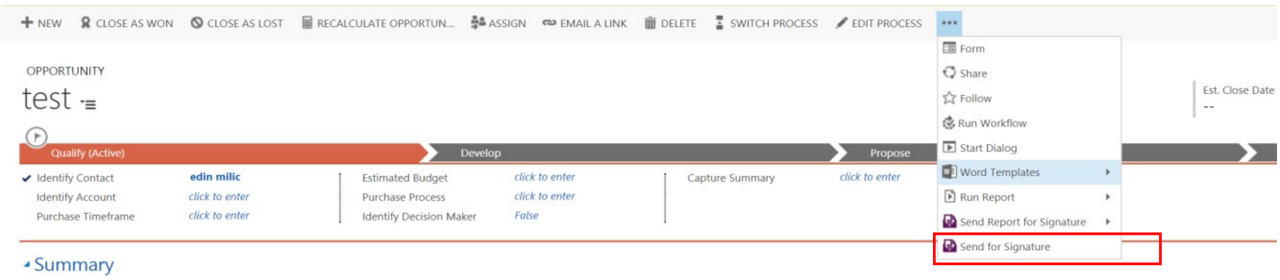
When the eSignAnyWhere integration with Microsoft Dynamics CRM is installed, a Send for Signature option is available from the **More ...** menu. You can use the **Send for Signature** option to send envelopes for signature from an entity or from the Envelopes page.

To send an envelope from an entity:

1. Navigate to a specific entity record (e.g.,Contacts, Opportunity, Orders, Quotes) within CRM and click to open it (In case you want to associate an entity that is not one of the default ones with the envelope you have to add a 1 to Many relationship between that entity and the envelope entity; doing so will show the Send for Signature button).
2. Click the **More Commands** menu.



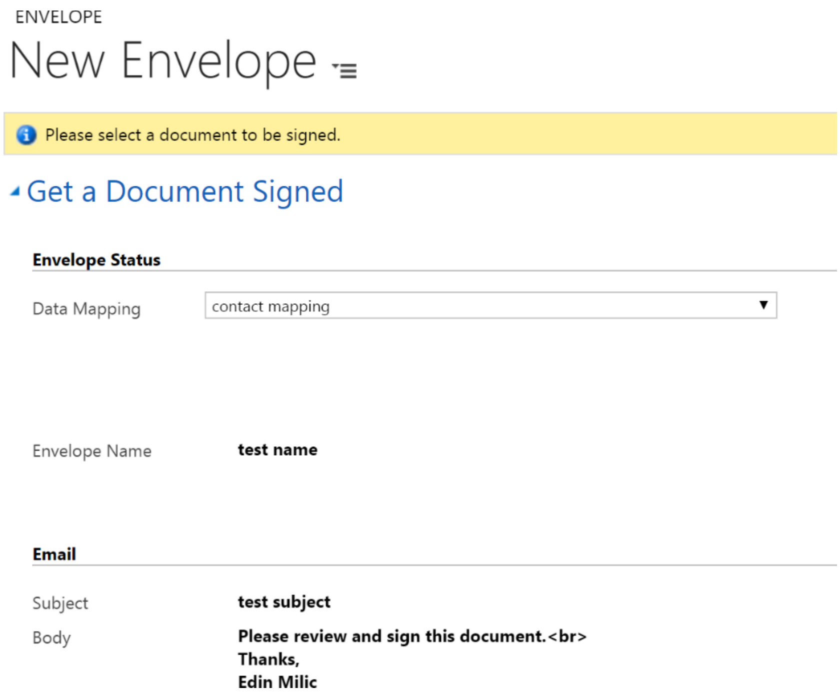
3. Select **Send for Signature** from the menu.



4. If one or more document types (mappings) exist for the entity and record selected in step 1, the default document type displays in the Data Mapping drop-down. This default can be overridden. If there are no document types (mappings) defined, the drop-down is empty.

Note: eSignAnyWhere Admins can define Data mappings for an entity.

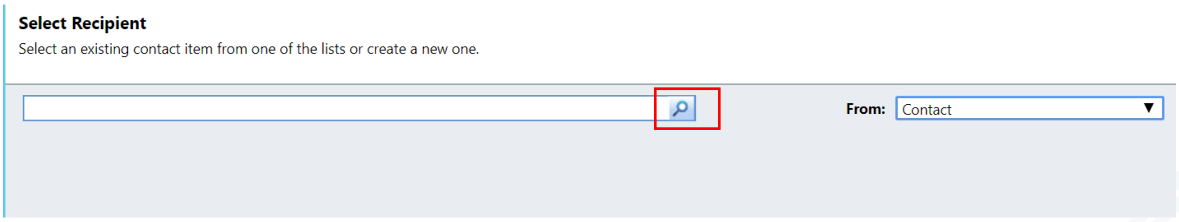
Note that if you use the **New** option to send an envelope from the Envelopes page, the Data Mapping drop-down does not display because there is no associated entity.



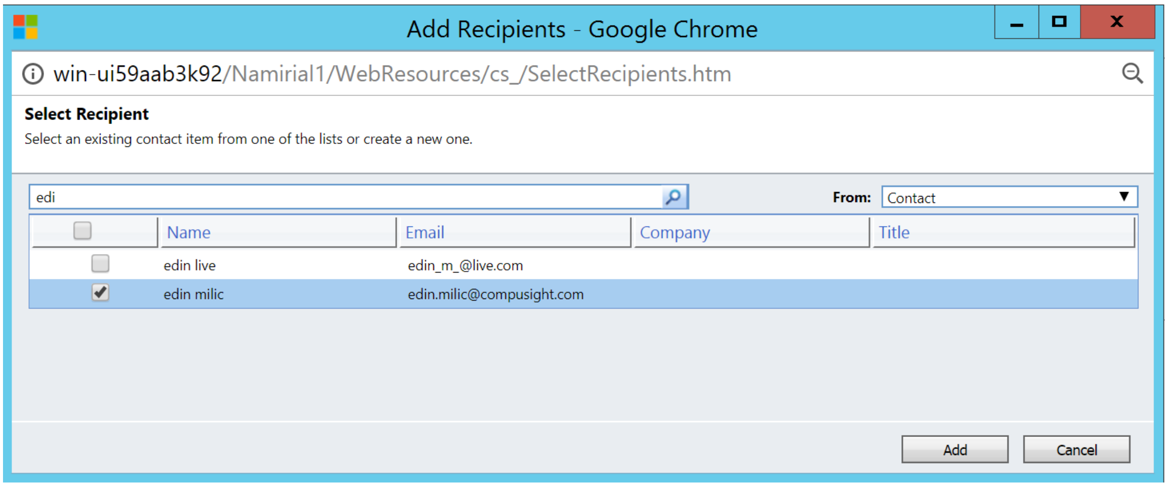
5. Depending on the record selected in Step 1 above, the first recipient may be automatically pre- populated. You can click the **Add** button in the Recipients section to add additional recipients.

6. In the *Add Recipients* dialog, do one of the following:

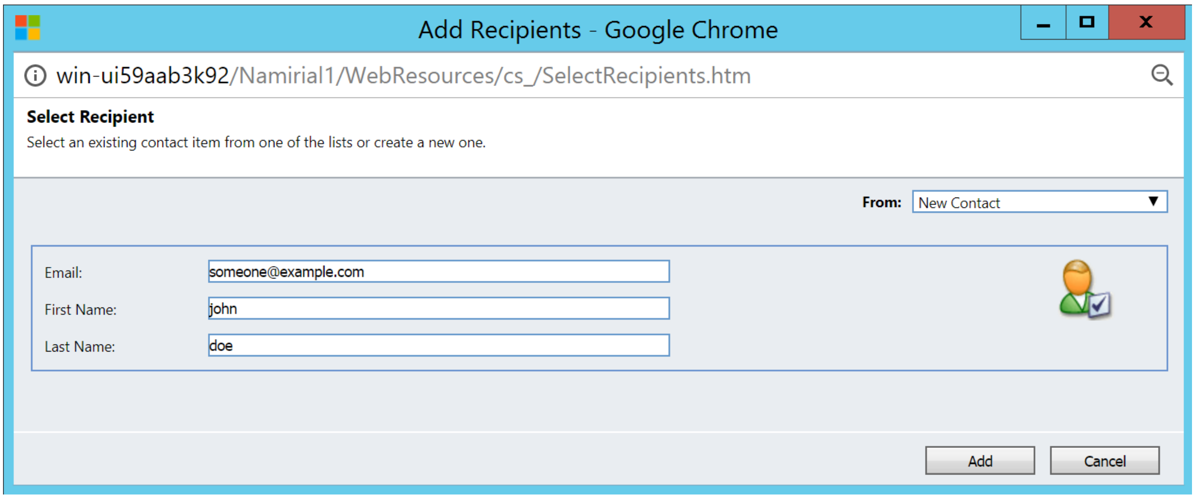
a. Find an existing contact by entering your search criteria, selecting a ‘CRM contacts’ option (Lead, Opportunity, Contact, Custom Recipient Sources) in the **From** drop- down, then click the looking glass icon.



Click the check box to select the recipient, then click **Add**.

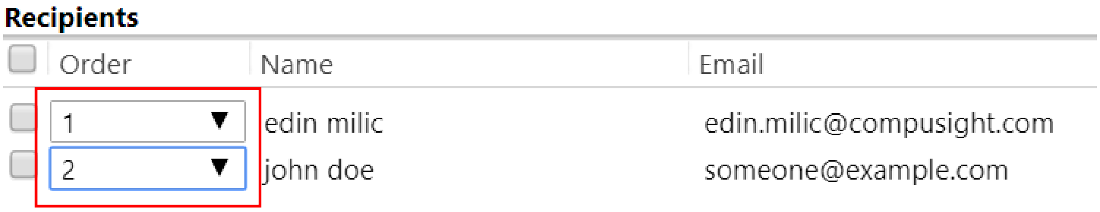


b. Select **New Contact** from the CRM Contacts drop-down then enter the recipient's email address, first name and last name.

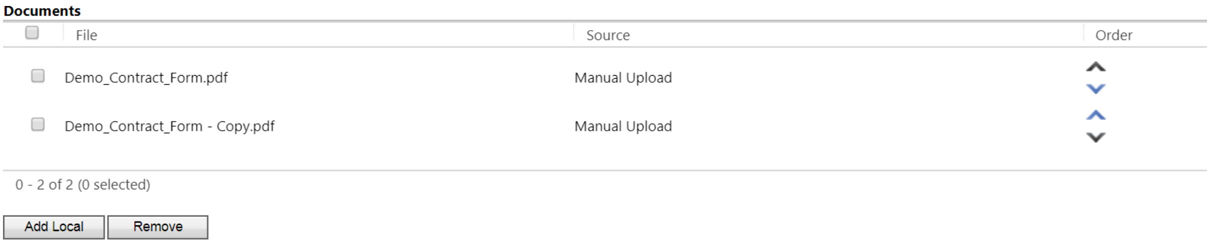


Click **Add** to add the contact.

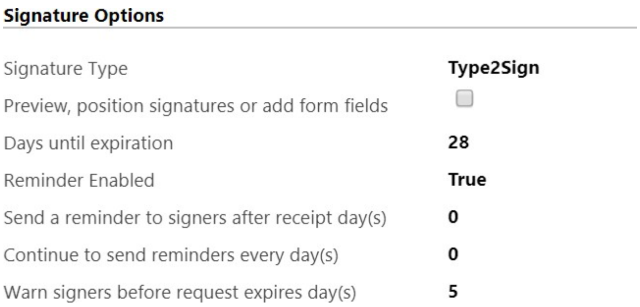
7. Recipients will sign the envelope in the order displayed. To change the order, use the drop-downs next to the recipient names.



8. Click the **Add Local** button to add one or more envelopes from your to add a document. You can change the envelope order using the **Move up** and **Move Down** controls on the right. To remove a document, click the **Remove** button.



9. Optionally, select one or more **Signature Options**.



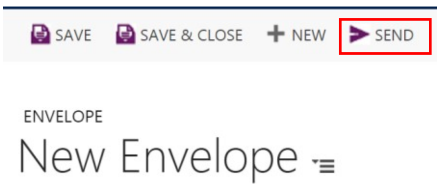
Each of these options function as follows:

- **Signature Type**—Allows selecting the type of signature or the different ways signature can be placed : Click to sign, type to sign etc.
- **Preview, position signatures or add form fields**—Allows you to preview the document and to drag- and-drop form fields on to it before sending it out for signature.

- **Days until expiration**—Allows you to set the expiration for the envelope. If the envelope is not completed within the given period its status is set to Expired and can only be Restarted at that stage.

- **Reminder Enabled**—Allows you to set reminders for an In Progress envelope. If this option is set to True 3 other fields open up below as seen in the picture above. **Send a reminder to signers after receipt days** is setting the first reminder (how many days after the envelope is sent**). Continue to send reminders every day(s)** sets a recurrent reminder, where an email is sent to recipients in a specified interval (every 4 days for example). **Warn signers before request expires** sets the last reminder before the envelope is turned into the status of Expired.

10. Click the **Send**. If you selected the *Preview*, *position signatures or add form fields* option, a new browser window in which you can drag-and-drop fields on the documents opens. When you've added the necessary fields, click the **Send** button in the upper right hand corner.



The envelope or report is sent for signature and will be listed in the Envelopes List with a status of "In Progress". The signers will receive an email requesting that they sign the envelope.

5. Sending Reports for Signature

When the eSignAnyWhere integration with Microsoft Dynamics CRM is installed and you have SQL Server Reporting Services (SSRS) installed and configured, a Send Report for Signature option is available from the **More ...** menu. The Send Report for Signature option allows you to select an existing report already configured within your CRM system for an entity type and send it for signature. The process for **Send Report for Signature** is similar to the process for **Send for Signature** with a few notable exceptions. For example, when you send a report, you must choose the report from a submenu of reports for the selected entity. Also, when you send a report, the generated report will be automatically attached as the first document for the Envelope.

6. Checking Envelope Status

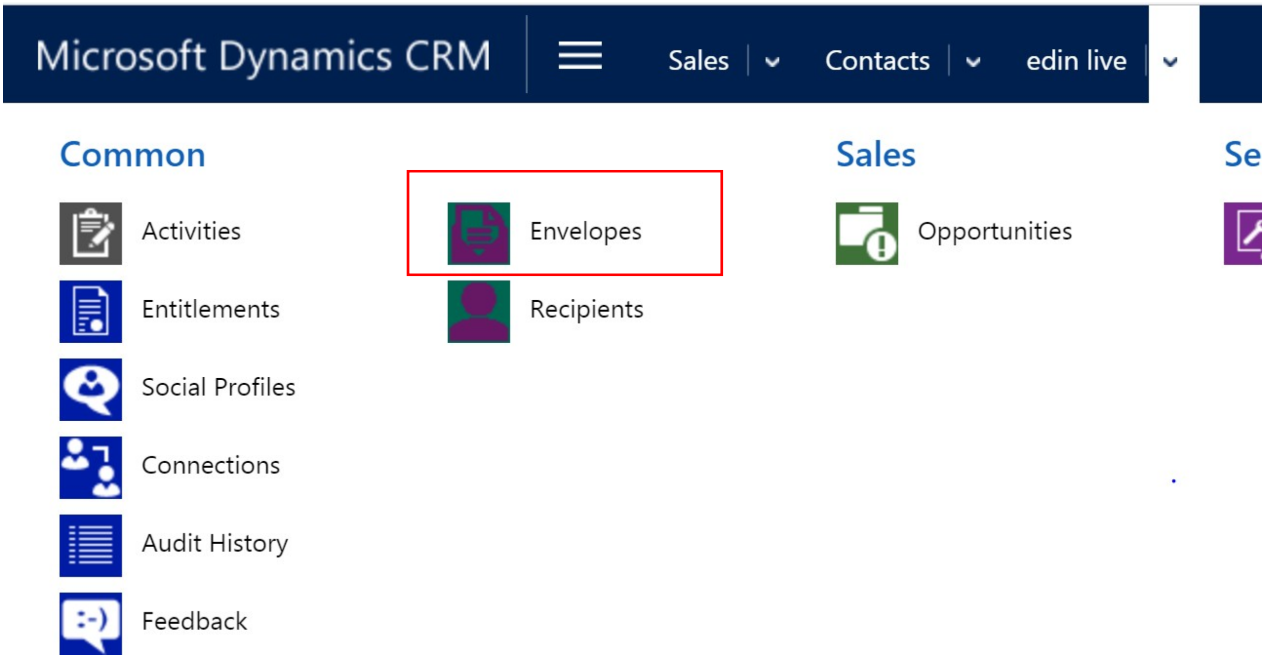
Once the recipient or recipients sign an envelope, the status of the envelope is updated to “Completed”.

All envelopes that have been sent for signature are listed in the envelopes list for a specific entity. You can view the audit report and the signed document for envelopes that have been signed.

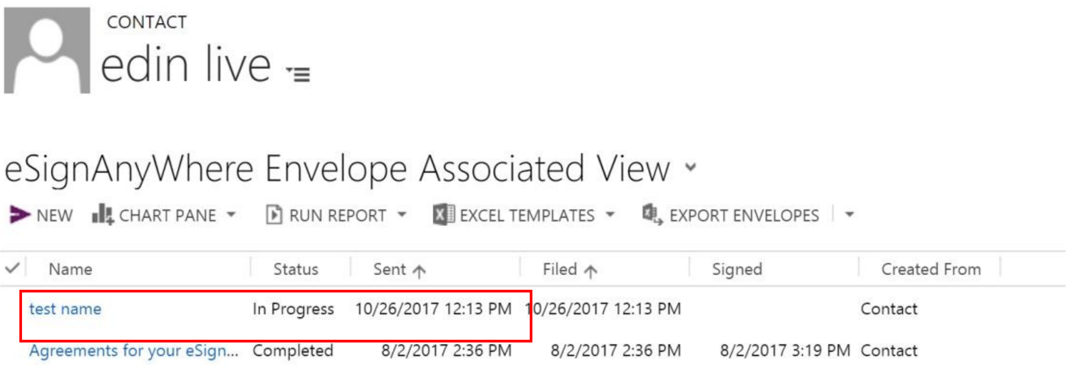
To view a signed document and its audit report, do the following:

1. Navigate to the entity record.
2. Click to open the record.
3. Click to open the Common menu for the record.

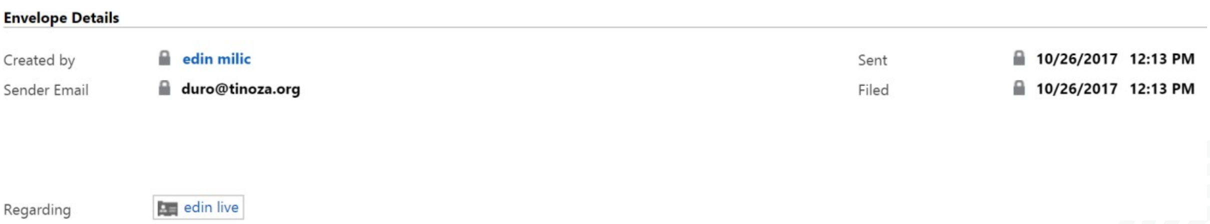
4. From the *Common* menu, click **Envelopes**.



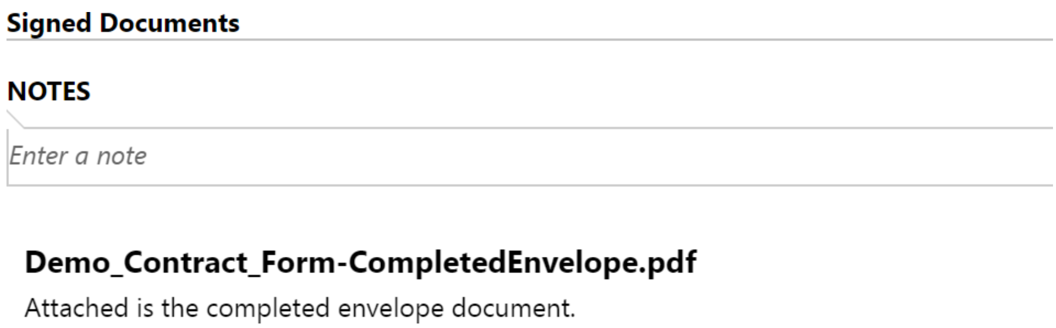
5. In the selected view, click on the link for the envelope.



6. On the *Envelope* page, you can scroll to view information on Envelope Status, Envelope Details, Email, Recipients, Documents, Signature Options, and Signed Documents.



7. Click in the scrollable *Notes* area at the bottom of the page to access the **Envelope Audit Trail** and the **Signed Envelope**



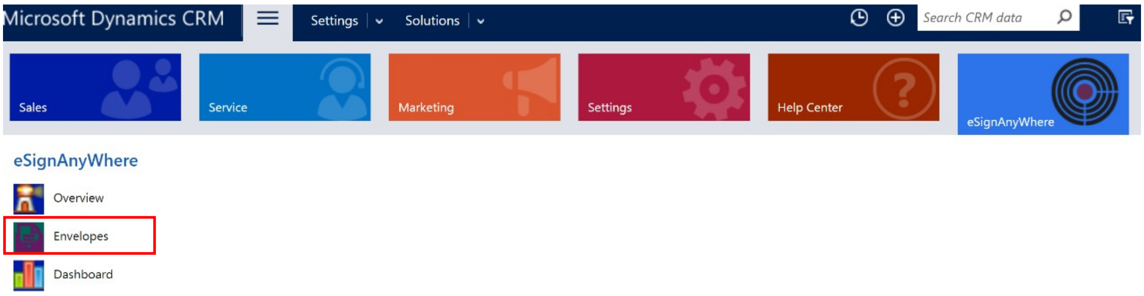
Note: If your CRM system has been configured to receive automatic updates from eSignAnyWhere services (CompuSight Update Workflow is started and running), the status of the envelopes are automatically updated every half and hour if their status changes. Please contact you CRM System Administrator to determine whether your account has been configured for automatic updates.

7. Viewing Envelopes and Updating Status

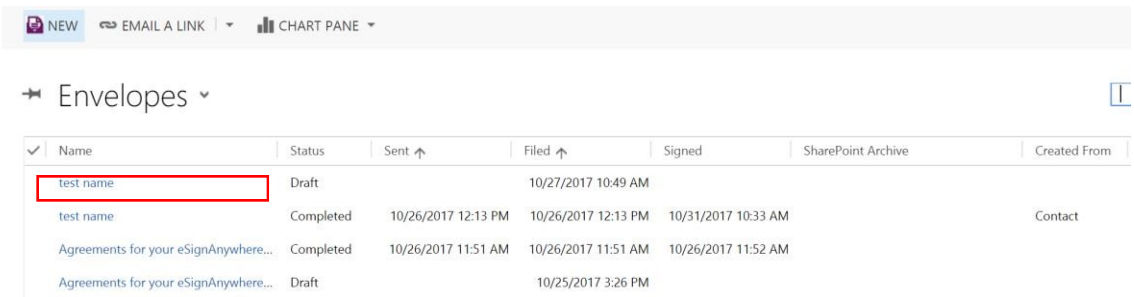
All envelopes, regardless of entity, are listed in the envelopes list on the Envelopes page. For signed envelopes, the envelopes lists display the *Name*, *Status*, and dates (*Sent*, *Filed* [completed envelope], and *Signed*) of the envelopes. For sent and draft envelopes, only the applicable information displays.

Information about *Created From* documents displays where applicable. To view envelopes from the Envelopes page, do the following:

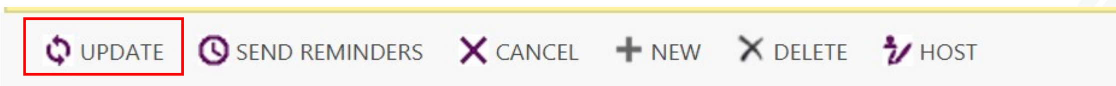
1. From the Main menu, click the **eSignAnyWhere** tile then click **Envelopes**.



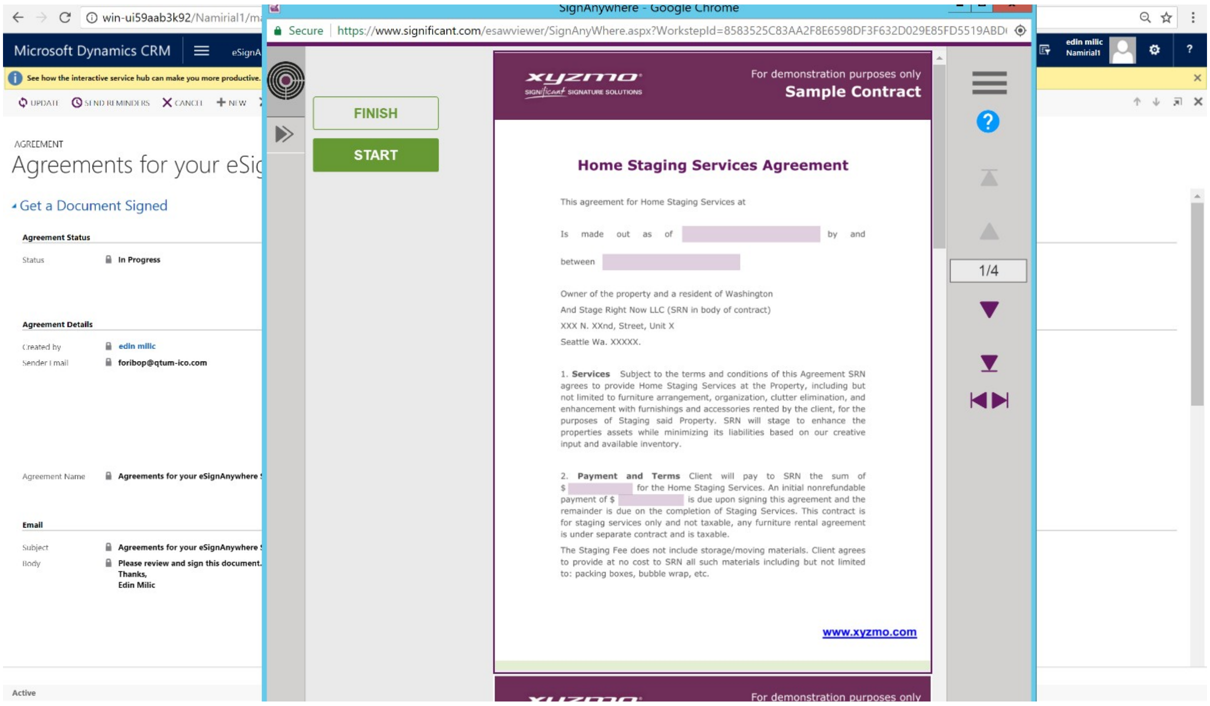
2. In the **Envelopes** list, you can sort envelopes by name, status, and so forth using the sort filters in the header row. To view more detailed information and perform optional actions, click the envelope name.



3. On the *Envelope* page, if the envelope is still in progress, you can click **Update** to update the status if automatic status updates have not been configured.



4. To remind the recipients (via email) once again to sign you can use the SEND REMINDERS button on the form ribbon
5. If the agrement is in the status of In Progress it can be cancelled using the ribbon action
6. Ultimately we can have an in-place signing (client that needs to sign is sitting next to you and maybe does not have access to his email) using the HOST option which mimics the Open document link he/she would receive in an email. The popup with the envelopes opens up and the recipient can choose to sign the envelope.



Note: For most of the ribbon actions (Cancel, Update and Host) browser popups must be enabled or else these will not be enabled for initiation