

# DocuSign for Microsoft Dynamics 365 User Guide

## Copyright

Copyright ©2003-2022 DocuSign, Inc. All rights reserved.

For information about DocuSign trademarks, copyrights and patents refer to the DocuSign Intellectual Property page (<https://www.docusign.com/IP>) on the DocuSign website. All other trademarks and registered trademarks are the property of their respective holders.

No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of DocuSign, Inc. Under the law, reproducing includes translating into another language or format. Every effort has been made to ensure that the information in this manual is accurate. DocuSign, Inc. is not responsible for printing or clerical errors. Information in this document is subject to change without notice.

# Table of Contents

<b>DocuSign for Dynamics 365 CRM.</b> . . . . .	<b>5</b>
<b>Install DocuSign for Dynamics.</b> . . . . .	<b>5</b>
<b>Uninstall DocuSign for Dynamics.</b> . . . . .	<b>7</b>
<b>Configure DocuSign for Dynamics.</b> . . . . .	<b>8</b>
Configuring DocuSign for Dynamics in Azure AD. . . . .	11
<b>Enable Sign and Send with DocuSign Actions for Entities.</b> . . . . .	<b>11</b>
<b>Manage User Access to DocuSign.</b> . . . . .	<b>12</b>
User access basics. . . . .	12
Assign the DocuSignUser role. . . . .	13
Edit the DocuSign Users table. . . . .	14
<b>Send an Envelope.</b> . . . . .	<b>15</b>
<b>Sign Documents.</b> . . . . .	<b>18</b>
<b>Send to Multiple Recipients Using Bulk Send.</b> . . . . .	<b>19</b>
Enable Bulk Send. . . . .	20
Create a Bulk Send Address List (Admins). . . . .	21
Edit a Bulk Send Address List (Admins). . . . .	22
Create a Bulk Send Address LIST (Users). . . . .	23
Edit a Bulk Send Address List (Users). . . . .	26
Send an Envelope Using a Bulk Send Address List. . . . .	27
<b>Integrate SharePoint Files.</b> . . . . .	<b>32</b>
Enable SharePoint file integration. . . . .	33
<b>Customize DocuSign for Dynamics.</b> . . . . .	<b>35</b>
<b>Create Custom Buttons.</b> . . . . .	<b>35</b>
Add a Custom Button to Send Documents with a Template. . . . .	38
<b>DocuSign Custom Activities.</b> . . . . .	<b>43</b>
<b>Add Custom Activities to Process Steps.</b> . . . . .	<b>44</b>
CreateEnvelope. . . . .	45
Add Document. . . . .	45
Merge Field/Merge Multiple Fields. . . . .	46
Add Recipient. . . . .	47

Add InPerson Signer.....	48
Get Signatures.....	48
Get Signing View.....	49
Get Field Value.....	49
<b>Merge Fields: Dynamics to DocuSign.....</b>	<b>50</b>
<b>Merge Fields: DocuSign to Dynamics.....</b>	<b>53</b>
<b>Autoplace Fields in Custom Buttons.....</b>	<b>54</b>
<b>Track Agreement Status.....</b>	<b>56</b>
Restore Envelopes.....	57
<b>Enable Plug-in Trace Logs for Client-side Debugging.....</b>	<b>57</b>
<b>Troubleshooting.....</b>	<b>58</b>
Error: An unexpected error occurred from ISV code.....	58
Error: The refresh token has expired due to inactivity (or completed envelopes do not write back within 90 days of sending).....	58
Error: Request not supported: new_{CustomWorkflowName}.....	59
Error When Reading from or Writing to a SharePoint Record.....	59
Errors when accessing the DocuSign Admin page.....	59
<b>Release Notes.....</b>	<b>60</b>

# DocuSign for Dynamics 365 CRM

Read about DocuSign eSignature for Dynamics, and how to install, customize, and manage users and documents.

This guide provides information on installing, signing, and sending documents for signature with DocuSign for Microsoft Dynamics. The primary audience for this guide is Microsoft Dynamics 365 CRM administrators. The installation and configuration tasks presented all require administrative rights.

## Supported Microsoft Dynamics CRM Versions

DocuSign eSignature for Microsoft Dynamics supports Microsoft Dynamics 365 CRM - v8.1 and later.

**Important:** It is not possible to upgrade DocuSign for Dynamics from version 6.2.0.13 or earlier to version 6.2.1 or later. To upgrade in this instance, you must completely uninstall all DocuSign elements and then perform a fresh install of the new version. Note that the status of any existing envelopes will not be preserved, and sent envelopes will not be able to write back to Dynamics.

**Restriction:** This software does not support any Microsoft Dynamics 365 CRM on-premises instances.

## Supported Browsers

- Edge (current version)
- Chrome (current version)
- Firefox (current version)
- MacOS Safari (current version)

## Early Access Notifications for Releases

For major releases, you can opt in to our Early Access list to receive notifications and pre-release versions before they are publicly available. To opt in, send an email request to [dyn@docusign.com](mailto:dyn@docusign.com) with your name and email address to receive Early Access notifications.

# Install DocuSign for Dynamics

Learn how to install DocuSign for Dynamics as an Office 365 Global Administrator.

**Important:**

To configure DocuSign for Dynamics, you must be a full DocuSign Administrator with Account Wide Rights and Send On Behalf of Permissions.

The Dynamics user you use to configure needs to be an Office 365 Global Administrator. That user also needs to be configured to bypass SSO and both **Device Verification** and **2FA** (Two-factor Authentication) must be disabled within DocuSign.

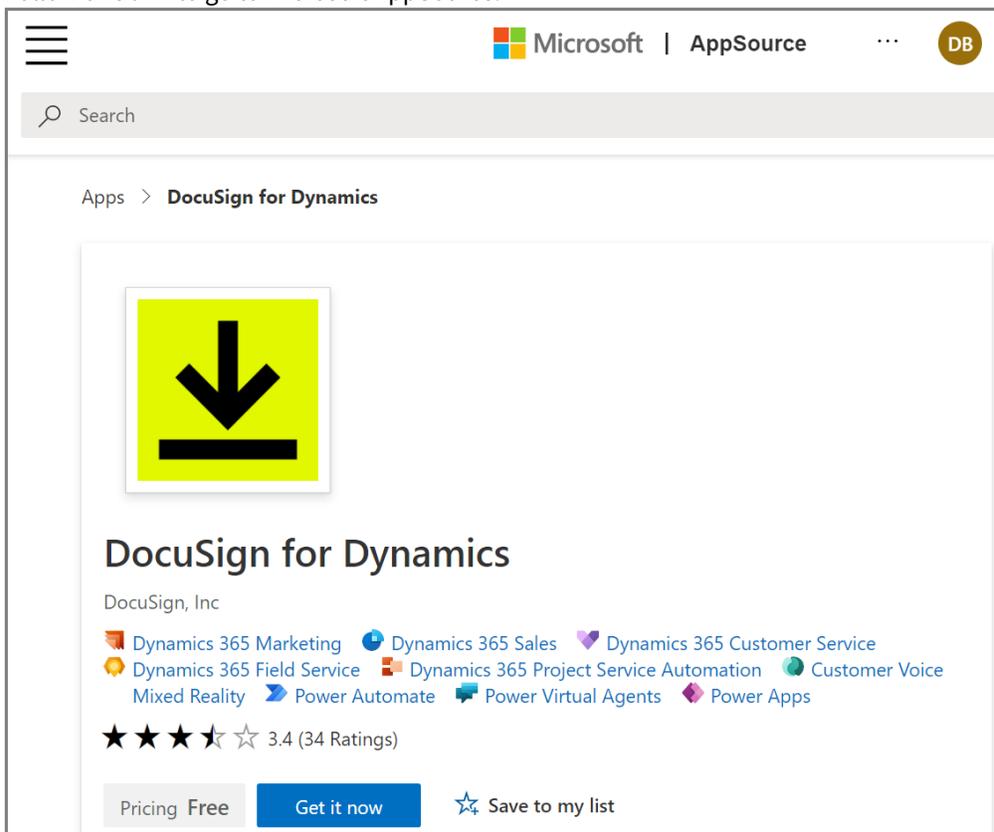
Any other administrators who need to access the DocuSign Admin page need to be in the same business unit as the user who configured the DocuSign account credentials. (The user's business unit can be found on their details page in the Organization Information section.) If the user is not in the same business unit they may encounter issues described [here](#).

DocuSign for Dynamics 365 does not support the cloning of Dynamics instances. Please uninstall the integration prior to cloning an environment and reinstall afterward.

Follow these steps to install the application or upgrade from an older installed version:

**Note:** When upgrading to a new version of the solution, all DocuSign status data and the system-wide login credentials are retained in Dynamics 365 CRM.

1. (Optional) If you are upgrading, as a best practice, we recommend that you export your Microsoft Dynamics 365 CRM customizations. After you complete the upgrade, if necessary, you can re-import your customizations.
2. Follow this [link](#) to go to Microsoft AppSource.



3. Select Get it now.
4. Using your work account, sign in to your Microsoft AppSource account, or sign up for an account if you don't already have one.

5. Read and accept the terms of use, and then select CONTINUE.
6. On the next screen, scroll down and select the organization to which you want to add DocuSign eSignature for Microsoft Dynamics.
7. Select the two check boxes to accept legal terms and privacy statements.
8. Select ACCEPT.

## Uninstall DocuSign for Dynamics

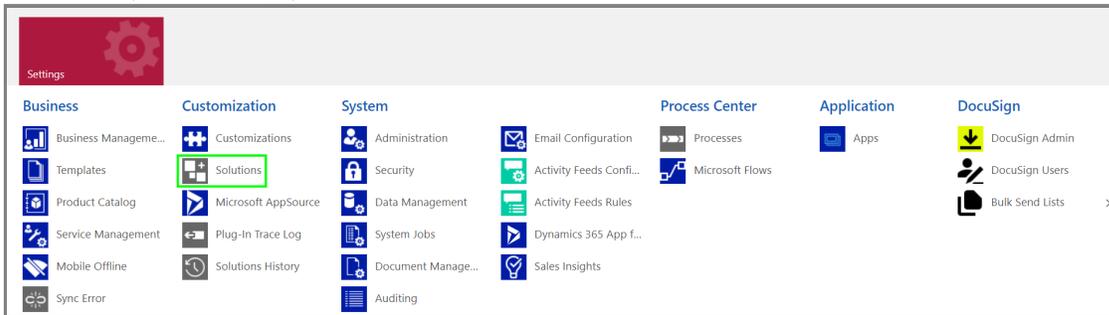
Learn how to uninstall DocuSign for Dynamics as an Office 365 Global Administrator

Uninstalling the DocuSign application deletes the solution from your Dynamics 365 CRM instance, as well as all DocuSign-related status data.

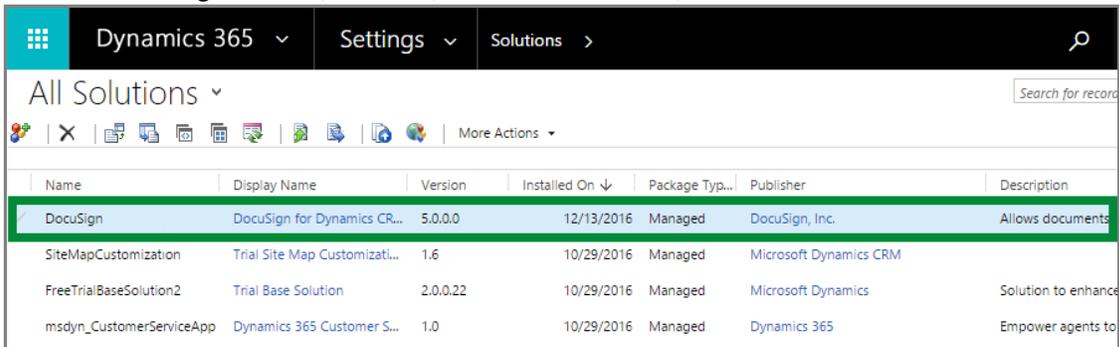
**Note:** Administrators must remove all dependencies to DocuSign from the Microsoft Dynamics 365 CRM instance before uninstalling, specifically:

- Remove any steps that reference DocuSign-related fields from any custom business process associated with the following entities: Accounts, Contacts, Leads, and Opportunities.
- Remove the DocuSign user role for all users.

1. To uninstall, click Settings, and then select Solutions.



2. Select the DocuSign solution, and then, on the Action toolbar, click Delete.





The DocuSign solution is uninstalled from your Dynamics 365 CRM instance, along with all DocuSign-related status data.

## Configure DocuSign for Dynamics

Learn how to set up and configure DocuSign eSignature for Dynamics as an Office 365 global Administrator.

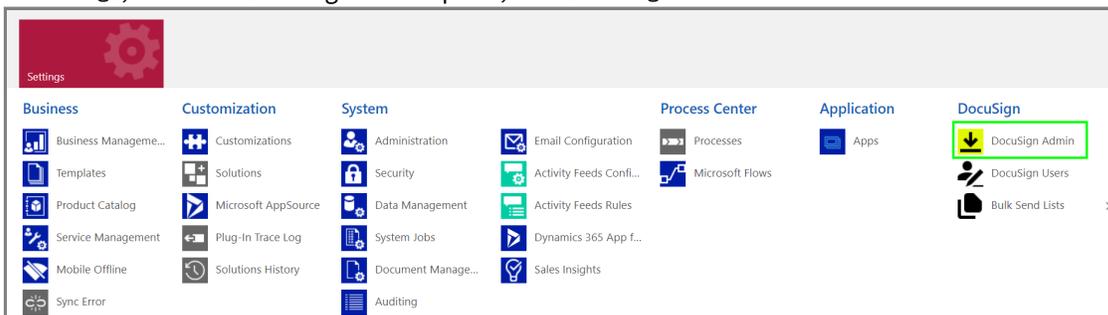
**Important:** You must be logged in as an Office 365 global administrator.

To complete the basic setup of DocuSign for Dynamics 365 CRM, you must have a DocuSign account, create a configuration to register your DocuSign account credentials, set your DocuSign environment, and allow DocuSign access to your Dynamics data.

After you create the DocuSign Configuration, you can adjust the account settings and enable DocuSign actions on your organization's Dynamics 365 CRM entities.

To create an account configuration:

1. From the Main menu, click **Settings**.
2. In **Settings**, under the **DocuSign** menu option, click **DocuSign Admin**:



3. Follow the on-screen instructions to enter your credentials. Best practice tip: use an integration admin user - a user with DocuSign admin permissions that is a service account just for the integration and that won't change over time.
4. In the **Authorize DocuSign for Dynamics** window, click **Connect** to allow the DocuSign solution to access your Dynamics 365 CRM data. This setting is required to enable all DocuSign functionality in your Dynamics organization.
5. After you have successfully logged in to DocuSign or created a new account, the **DocuSign Admin Home** screen appears. Click **ACCOUNT** to see your account information.

The screenshot displays the DocuSign ADMIN interface. At the top left is the DocuSign logo followed by 'ADMIN'. Below this is a navigation menu with 'HOME', 'ACCOUNT' (highlighted with a blue underline), 'SETTINGS', and 'ENTITIES'. The main content area is titled 'DocuSign Account Information' and contains two columns of data: 'Account Name' (DocuSign) and 'Account ID' (3801008) in the first row; 'System User' (dyndemo000@dsxtr.com) and 'Environment' (Demo) in the second row. Below this is a section titled 'Connect DocuSign to Dynamics' with a 'User' field containing 'admin@DocuSignTest001.net'. At the bottom, there are two buttons: a blue 'MODIFY ACCOUNT CONFIGURATION' button and a grey 'GO TO DOCUSIGN' button.

To adjust your account settings

Select **SETTINGS** from the DocuSign Admin screen, and adjust any of the following options.

## DocuSign® ADMIN

HOME
ACCOUNT
SETTINGS
ENTITIES

---

### Document Settings

**Signed document naming convention**

DocuSign document subject + "\_signed" ▼

**Download signed document as**

Combined PDF ▼

Include a Certificate of Completion with signed documents

**Save completed documents to SharePoint**

DISABLE

### Email Settings

**Default Email Subject**

Please review and sign your document

**Default Email Message**

SAVE

- **Include Certificate of Completion:** check to include Certificate of Completion (CoC) along with completed documents when a copy is saved to Dynamics.

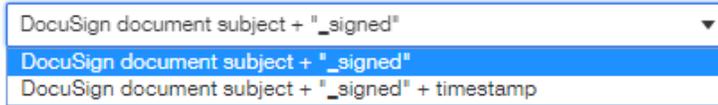
Include a Certificate of Completion with signed documents

- **Save completed documents to SharePoint:** enable saving an additional copy of completed documents to SharePoint. When enabled, a copy of the completed documents will save both to SharePoint and Dynamics. See for more information.

Save completed documents to SharePoint

DISABLE

- **Signed document naming convention:** select the format of the file name for the copy of completed documents. The timestamp represents the time the Dynamics CRM system received the documents from DocuSign.

**Signed document naming convention**

DocuSign document subject + "\_signed" ▼  
DocuSign document subject + "\_signed"  
DocuSign document subject + "\_signed" + timestamp

- Email Settings: Modify the default email subject and message that is sent to all recipients when sending a document for signature.

**Email Settings****Default Email Subject****Default Email Message**

- Click SAVE to save your Settings changes.

## Configuring DocuSign for Dynamics in Azure AD

If your Dynamics deployment uses Azure AD, you must use the appropriate Partner Server Application ID when configuring the integration, otherwise DocuSign for Dynamics may be blocked.

Partner Server Azure Application Registration IDs:

**Production (AU/CA/EU/NA) DocuSign for Dynamics CRM:**

- b78cb721-d8cf-44cf-948e-220ff396e0e6

**Production (AU/CA/EU/NA) DocuSign for Dynamics CRM to SharePoint Online:**

- 018eafae-8848-4090-93b5-bdb32e9d0f4a

**DEMO DocuSign for Dynamics CRM:**

- 7e10de84-a294-475d-890d-c8b4f2494268

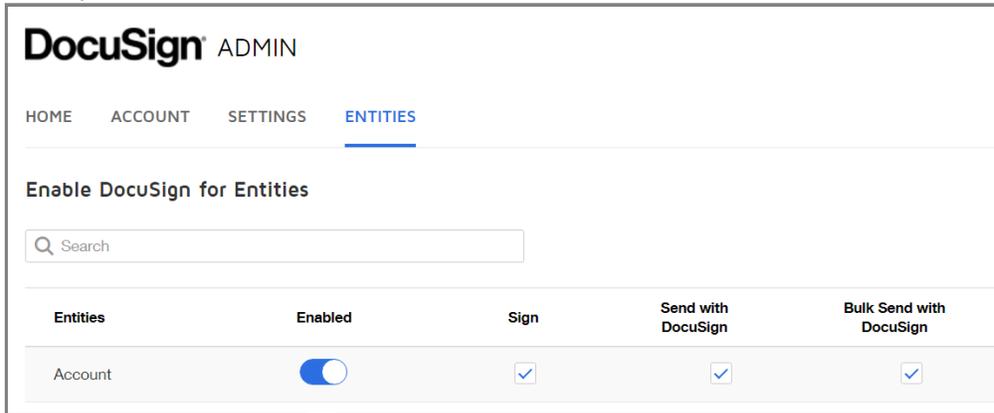
**DEMO DocuSign for Dynamics CRM to SharePoint Online:**

- 4056f481-f594-41d1-aa66-ce5a034e1373

# Enable Sign and Send with DocuSign Actions for Entities

Learn how to enable signing and sending actions in DocuSign for Dynamics.

1. Click ENTITIES, Enabled, Sign and Send with DocuSign. By default, Send with DocuSign is enabled for the Account, Opportunity, Contact, Lead, and Quote entities. The actions display in the ribbon bar of entities for which they are enabled. Hover over the entity name to see the fully qualified name of the entity, including the namespace.



2. On the bottom left, click SAVE to save your Entities changes.

## Manage User Access to DocuSign

Learn about requirements for users to access DocuSign for Dynamics.

Before your users can use DocuSign for Dynamics 365, they must:

- be a member of the DocuSign eSignature account connected to that Dynamics instance. The DocuSign account is specified in the DocuSign Admin configuration settings.
- be assigned the DocuSignUser role in Dynamics

## User access basics

Learn more about user access and how to provision DocuSign for different types of users.

To use DocuSign to sign or get signatures, Dynamics users must be members of the DocuSign account specified in the DocuSign Admin. As long as Dynamics users are members in the DocuSign account, using the same email address as in the Dynamics organization, they will be able to seamlessly access the DocuSign functionality. If they use a different email address, or if they are not members in the DocuSign account, then as the DocuSign administrator, you'll need to provide assistance.

When a Dynamics 365 CRM user executes any DocuSign action, the system checks to see whether that user exists in DocuSign using the email address of the Dynamics user.

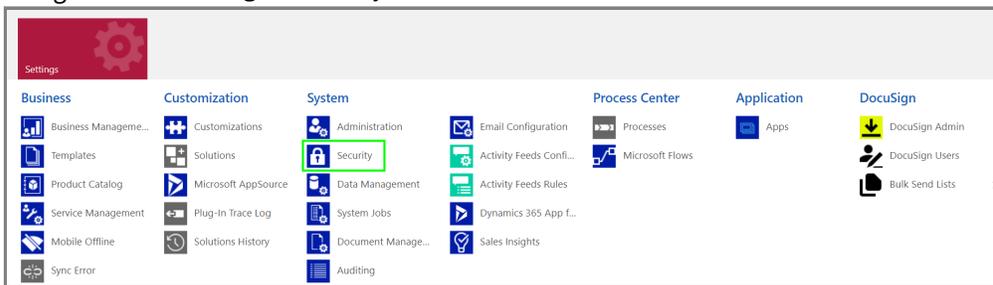
- If the user is a member in the DocuSign account specified in the DocuSign Admin, they are added to the DocuSign Users table and they can proceed to use the application.
- If the user is not a member in the DocuSign account, a message instructs the user to contact the solution administrator for assistance. In this case, a DocuSign administrator for the account must add the user manually, as described in [this Help guide](#).

## Assign the DocuSignUser role

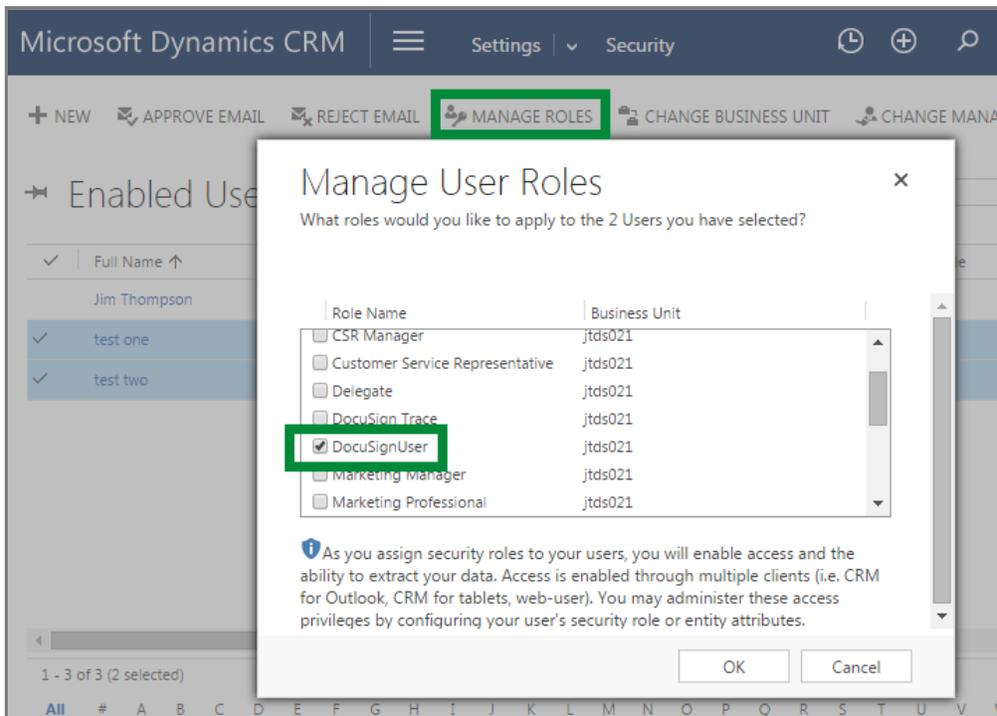
Learn how to edit user records to enable access to DocuSign for Dynamics.

For a non-administrative user of Dynamics 365 CRM to have access to DocuSign solution, as the Dynamics 365 CRM administrator, you must edit the user's record to assign the DocuSignUser role.

1. Log in as a Dynamics 365 CRM administrator.
2. Navigate to the **Settings > Security** view.



3. Click **Users**.
4. Locate the user record for the person to which you want to grant access, and select it. You can select multiple records at once.
5. Click **Manage Roles**, and then select the **DocuSignUser** role.



**Note:** You may notice a DocuSign Trace role. This is a system role, used for debugging purposes only; do not assign users to this role.

6. Click OK.

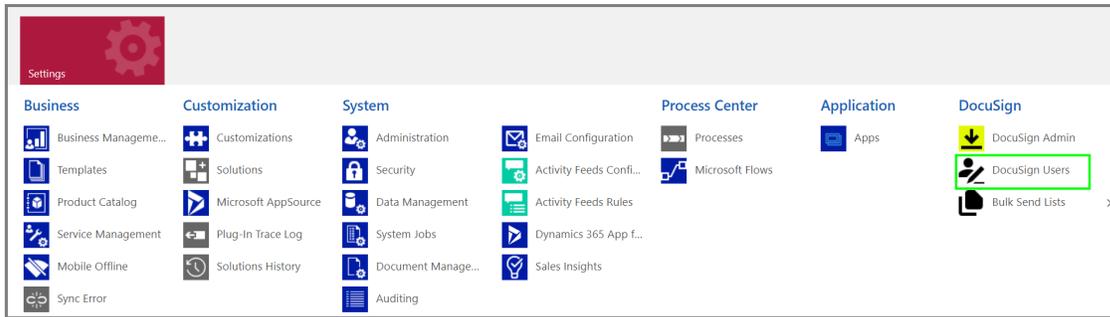
The user is assigned the role and has access to DocuSign eSignature for Microsoft Dynamics.

## Edit the DocuSign Users table

Learn about Administrator tasks for adding and modifying records in the Users table in DocuSign for Dynamics.

As the Dynamics 365 CRM administrator, you can edit the DocuSign Users table to correct or add entries. For example, if a Dynamics user has a different email address for the DocuSign membership, you can add them to the table manually.

1. Log in as a Dynamics 365 CRM administrator.
2. Navigate to the Settings > DocuSign Users view.



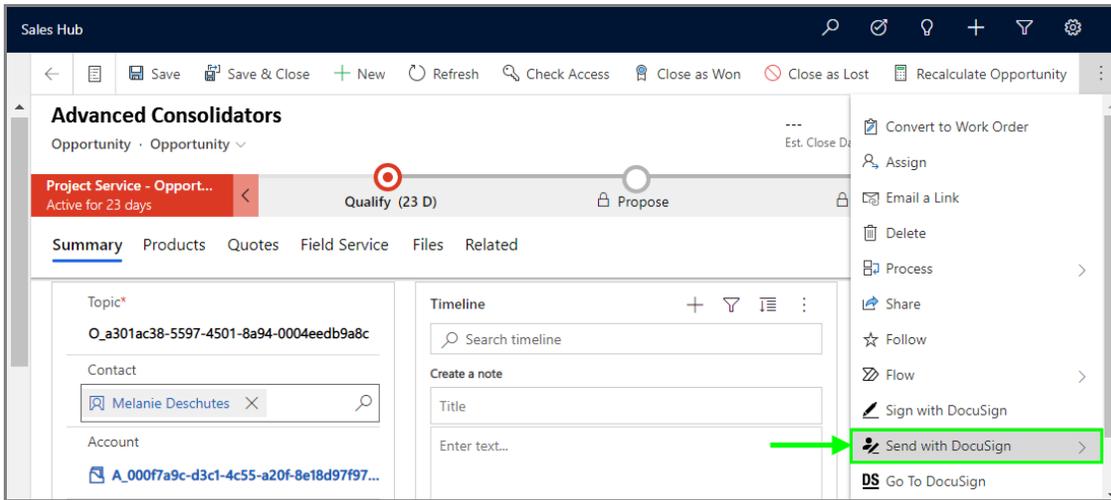
3. To edit an existing record,
  - a. Locate and select the user record, and then click Edit.
  - b. Update the DocuSign Email field to match the address used in the DocuSign account.
  - c. Click SAVE.
4. To add a record,
  - a. Click NEW.
  - b. In the System User field, enter or search for and select the user's name.
  - c. In the DocuSign Email field, type the user's DocuSign email address.
  - d. Click SAVE.

The next time the user attempts to use the DocuSign solution, the system checks to see whether the user is a member of the DocuSign account, under the email address entered in the DocuSign Users record. If you entered the correct email address, the user will be able to use the solution, and the record in the table will be updated with the remaining DocuSign information.

## Send an Envelope

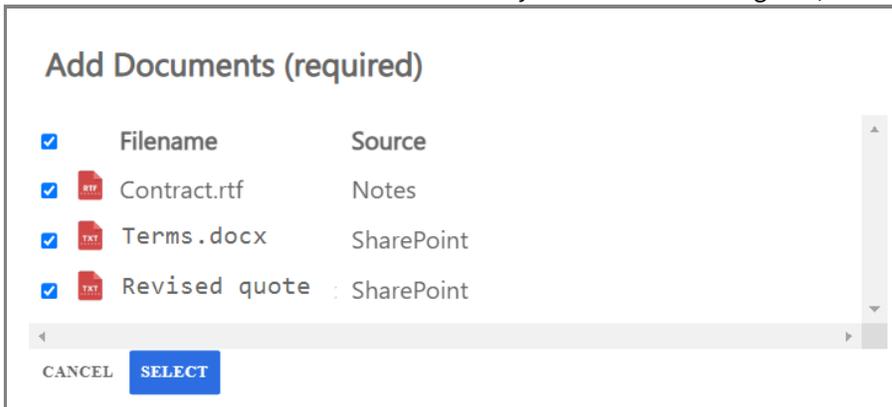
Learn about the steps to send an envelope for signature with DocuSign for Dynamics.

1. Select an entity and open the record from which you want to send documents.
2. In the command bar, select Send with DocuSign > Get Signatures.

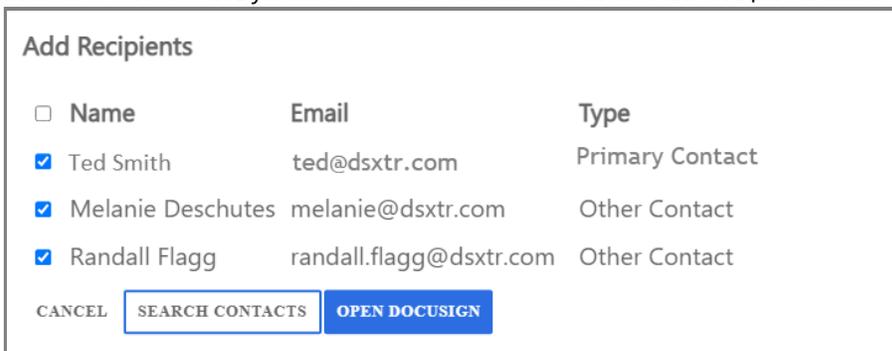


**Note:** To send documents to multiple recipients, you can choose Bulk Send. See [Send to Multiple Recipients Using Bulk Send](#) for more information.

- Files associated with the Notes of the record are available to be added to the envelope. SharePoint documents are also eligible to add if the SharePoint integration is enabled. You can choose which files to send using the check boxes in Add Documents window. When you are done selecting files, click SELECT.



- Next, add recipients for the envelope. You can select recipients from the record contacts or from any other available contacts in Dynamics. Use the check boxes in the Add Recipients window to select recipients.



- When you are done adding contacts and files, select OPEN DOCUSIGN to open your DocuSign account and continue the sending process.

6. In DocuSign, you can add other recipients and add additional documents, recipients, and an email message to recipients. See [Add Recipients](#) for more information.

- To add the first recipient, enter the name and email address, and then select the recipient action.
  - To add an additional recipient, click Add Recipient, enter the name and email address, and select the recipient action.
  - To remove a recipient, click the X to the right of the recipient's row
  - To change the signing order, select the Set signing order check box, and then select the number next to a recipient's name and enter a new value. Recipients can sign in a set order, at the same time, or a mixture of both.
7. Review the Message to All Recipients and adjust the subject and message as needed.

8. Click NEXT to continue and open the DocuSign Add Fields view.

9. To assign fields to a recipient, select the recipient in the Recipients list and drag and drop fields from the list onto your document.

**Note:** For more information about adding fields, see [Add Fields](#).

10. Select SEND to send the document for signing.  
A copy of the envelope will be saved to the originating record in Dynamics once all recipients have signed and the envelope is completed

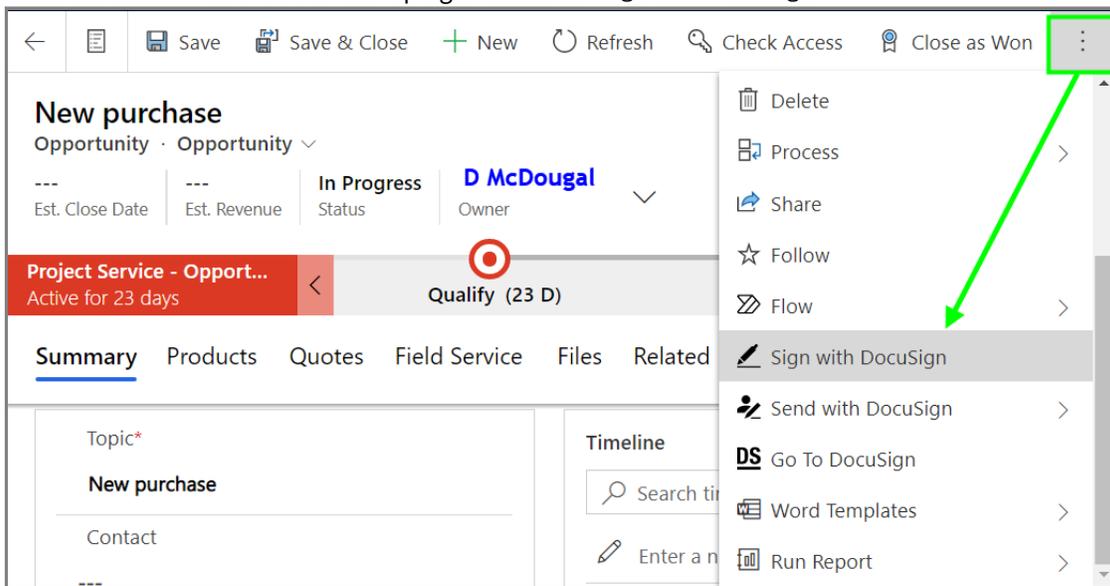
## Sign Documents

Learn about signing documents when using DocuSign for Dynamics.

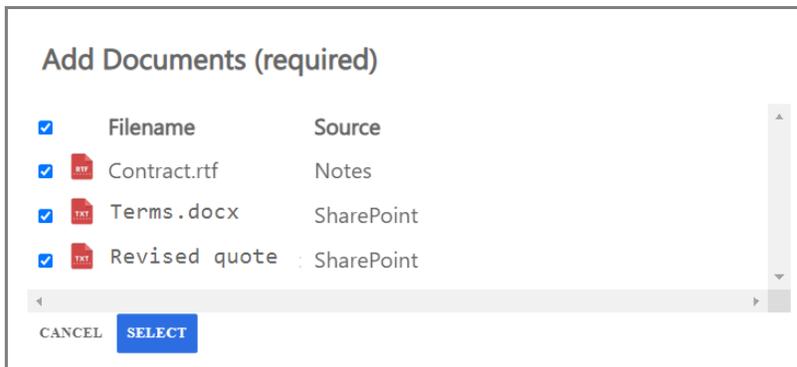
With DocuSign for Dynamics, you can sign documents directly from records in Dynamics 365 CRM.

To sign documents

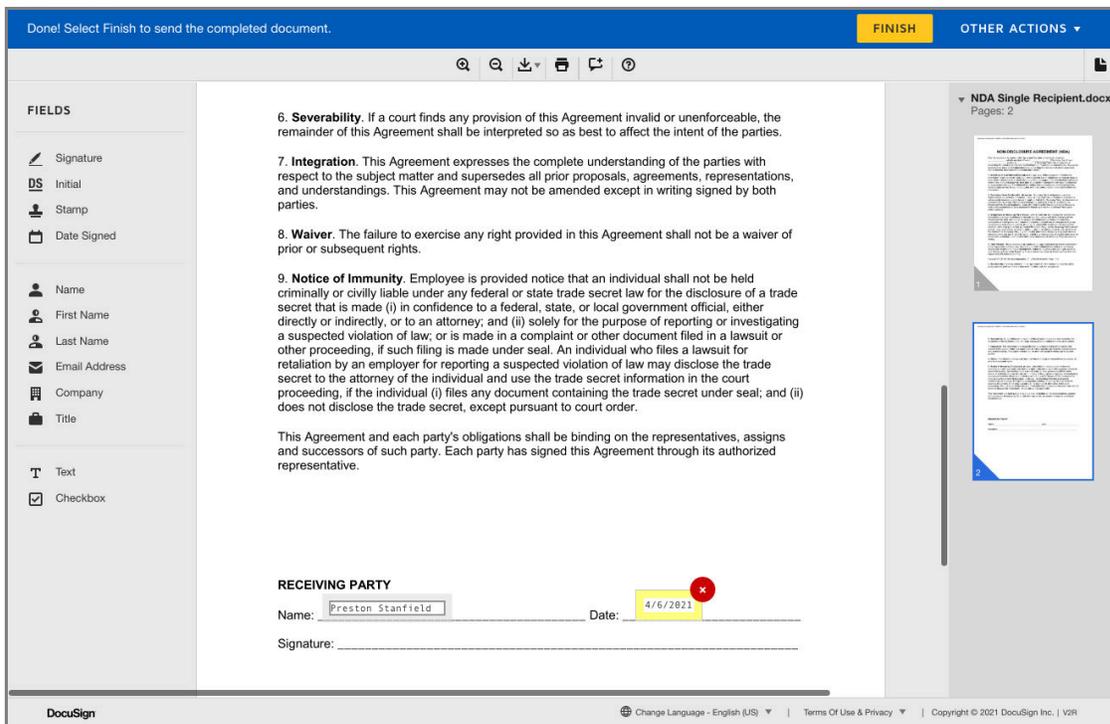
1. Select an entity and open the record from which you want to sign documents.
2. Click the three vertical dots at the top right and select Sign with DocuSign.



3. In the Add Documents window, select documents to sign using the check boxes. Files associated with the Notes of the record are available to add to the envelope. SharePoint documents are also eligible to add if the SharePoint integration is enabled.



4. When you are done adding documents, click **SELECT** to create an envelope and open a DocuSign window.
5. You can add more recipients and documents, and change or add the email message. When you are done, click **NEXT** to open the Add Fields window.
6. Drag and drop fields from the palette on the left side of the window to the appropriate location in the document.



**Note:** For more information about adding fields, see [Add Fields](#).

7. Click **Finish**. You have successfully signed the document with DocuSign. The signed document is saved as a PDF file in the Notes section on the entity from which you signed the document.

# Send to Multiple Recipients Using Bulk Send

Read about Bulk Send with DocuSign for Dynamics.

Bulk Send lets you send an envelope to multiple recipients with one click. DocuSign generates a unique Envelope ID for each recipient. You can create a new Bulk Send address list, or you can use or modify an existing list. When you have selected a Bulk Send address list, you can use it to send an envelope to multiple recipients.

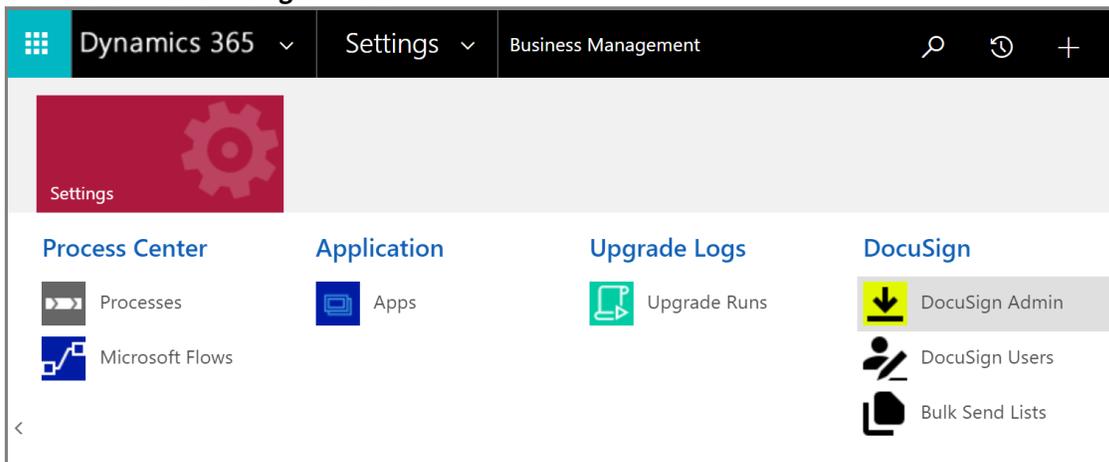
## Enable Bulk Send

Learn how to enable Bulk Send so that users can send an envelope to multiple users in DocuSign for Dynamics.

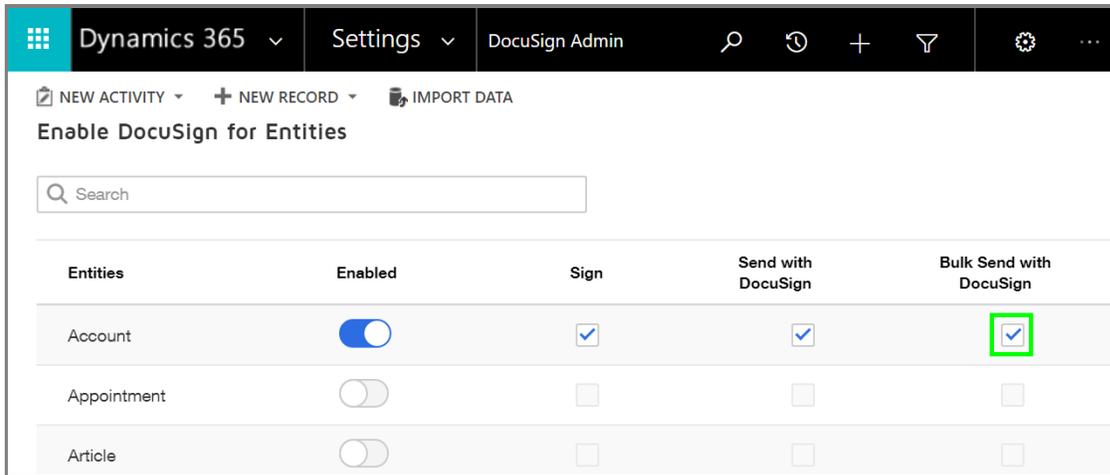
Only Administrators can enable or disable Bulk Send for specific entities. Once Bulk Send is enabled, any DocuSign user can create and modify Bulk Send lists and use them to send envelopes through DocuSign.

Follow these steps to enable Bulk Send:

1. Click the gear icon at the top right of the window.
2. Select **Advanced Settings** to open a new window.
3. Click the down arrow next to **Settings**.
4. Scroll over to the **DocuSign** section.



5. Click **DocuSign Admin**.
6. Select the **Entities** tab.



Entities	Enabled	Sign	Send with DocuSign	Bulk Send with DocuSign
Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appointment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Article	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Click the Bulk Send with DocuSign toggle for an entity to make Bulk Send available.
8. Click Save

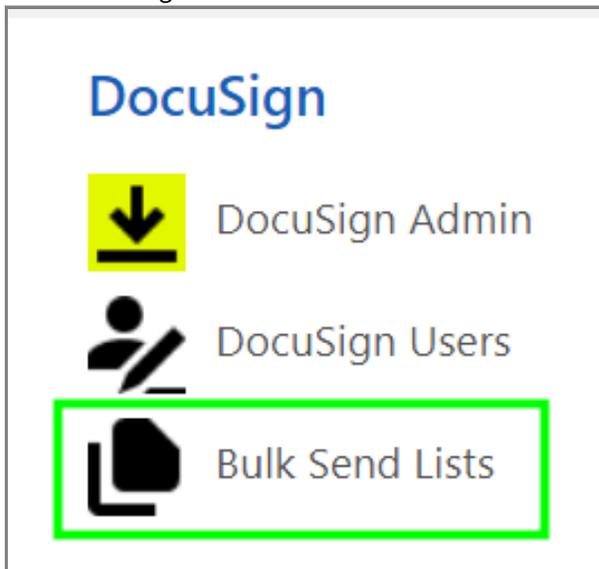
## Create a Bulk Send Address List (Admins)

Learn how Administrators can create a list of addresses for the Bulk Send Feature in DocuSign for Dynamics.

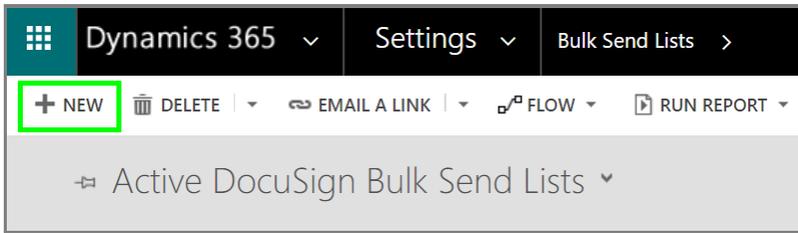
Admins create Bulk Send lists from the **Settings** menu.

**To create a Bulk Send list:**

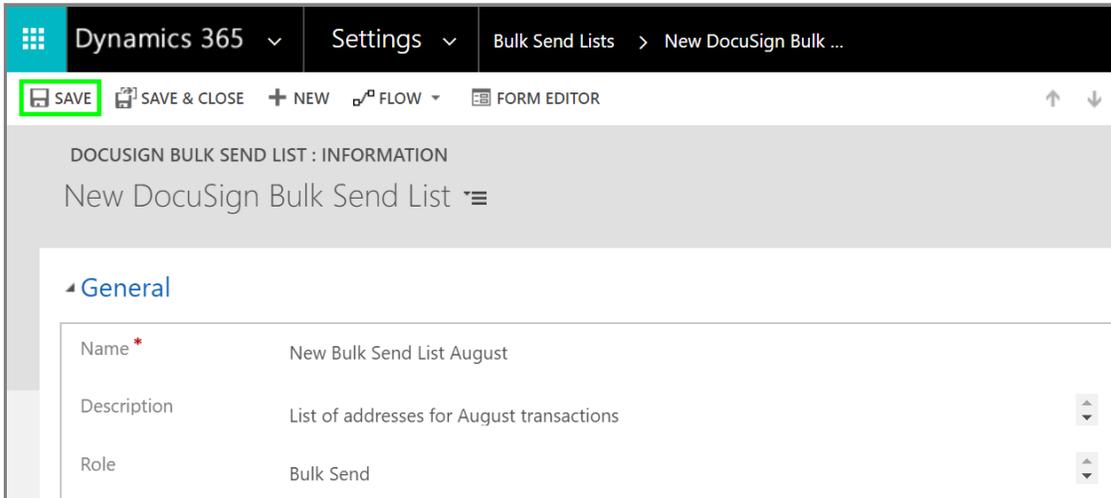
1. Click the down arrow next to Settings in the Admin window
2. Scroll to the right and select **Bulk Send Lists** under the DocuSign section



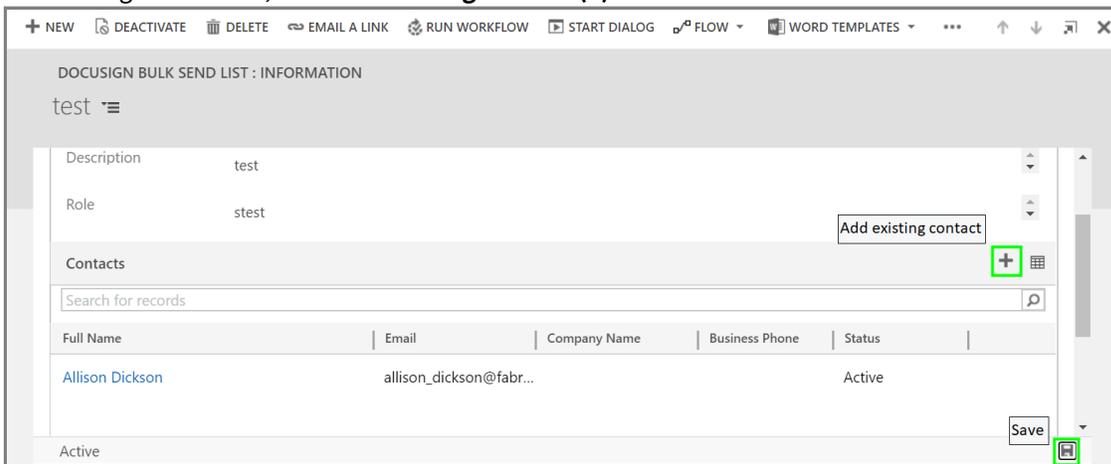
3. In the Bulk Send List dialog, click **New** at the top to create a new list



4. Enter a **Name** for the new list and an optional description
5. Enter **Bulk Send** for the **Role** Note: the Role you enter must match the Role in the template you are going to use. For example, if the template has *signers* in the role, then you would enter *signers* here.
6. Click **Save**



7. After saving the new list, click **Add Existing Contact (+)**



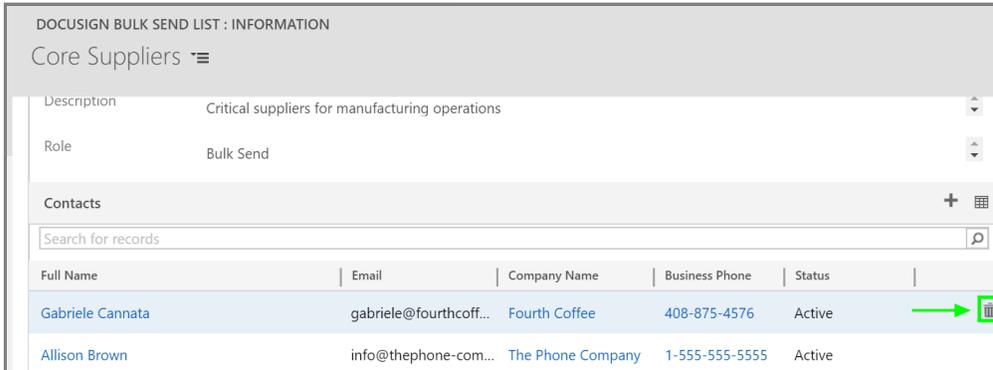
8. Enter text in the search box to look for a specific contact, or press Enter to see all contacts
9. Click a contact to add it to the Bulk Send list. You can add up to 1000 contacts to a list.
10. When you are done adding contacts, click the **Save** icon at the lower right of the window

## Edit a Bulk Send Address List (Admins)

You can add or remove addresses from any Bulk Send list.

### To remove an address:

1. Open a Bulk Send address list
2. Select a user
3. Click the trash can that appears at the right



4. Click **Save** when you are done

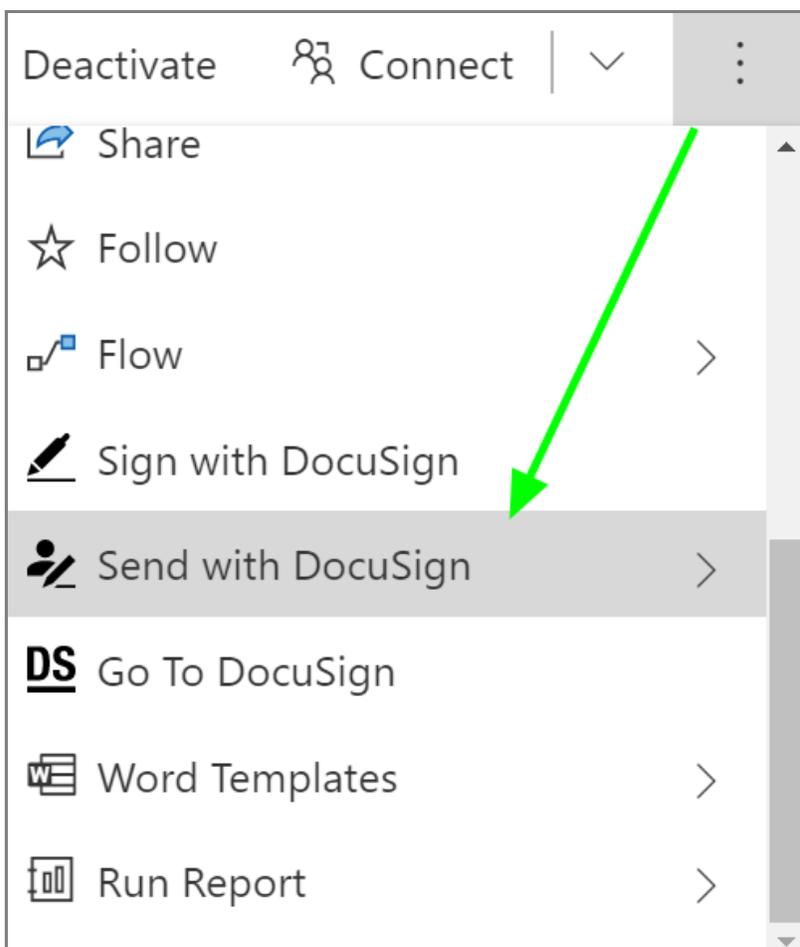
## Create a Bulk Send Address LIST (Users)

Learn how users can create lists of addresses for the Bulk send feature of DocuSign for Dynamics.

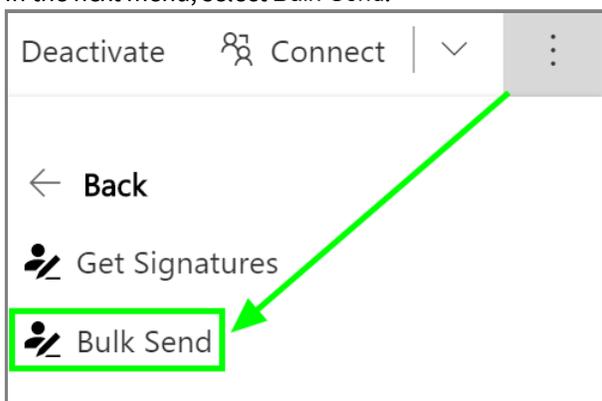
Any DocuSign user can create and modify Bulk Send lists. Creating a list involves selecting contacts from Dynamics CRM and adding them to the list.

To create a Bulk Send list:

1. Open an Entity that has Bulk Send enabled, for example an Account or Contact.
2. Click the three vertical dot icon at the upper right.



3. Select Send with DocuSign.
4. In the next menu, select Bulk Send.



5. In the Lookup Records dialog, click New DocuSign Bulk Send List.

Lookup Records
×

**Select record**

Type to search or press Enter to browse

+
New DocuSign Bulk Send List

Add

Cancel

6. In the New Bulk Send list dialog, enter a Name for the new list and an optional description.
7. The **Role** should be identical to the the Role in the template you are going to use. For example, if the template has *signers* in the Bulk Send role, then you would enter *signers* here.
8. Click Save.
9. After saving the new list, click Add Existing Contact.

### New Bulk Send List

DocuSign Bulk Send List

General   Related

Name	* New Bulk Send List
Description	New list for testing
Role	Bulk Send

Contacts

📄
Add Existing Contact
⋮

10. Use the Search box to find a Contact, or simply press Enter to see a list of all Contacts.

Lookup Records

Select record

Look for Records

Recent records All records

DeCastro

Allison Brown

Bernadette Foley

Gabriele Cannata

Eva Elznicova

+ New Record

Add Cancel

11. You can add up to 1000 Contacts to a Bulk Send list. When you are done adding Contacts, click Add.
12. Click Save when you are done.

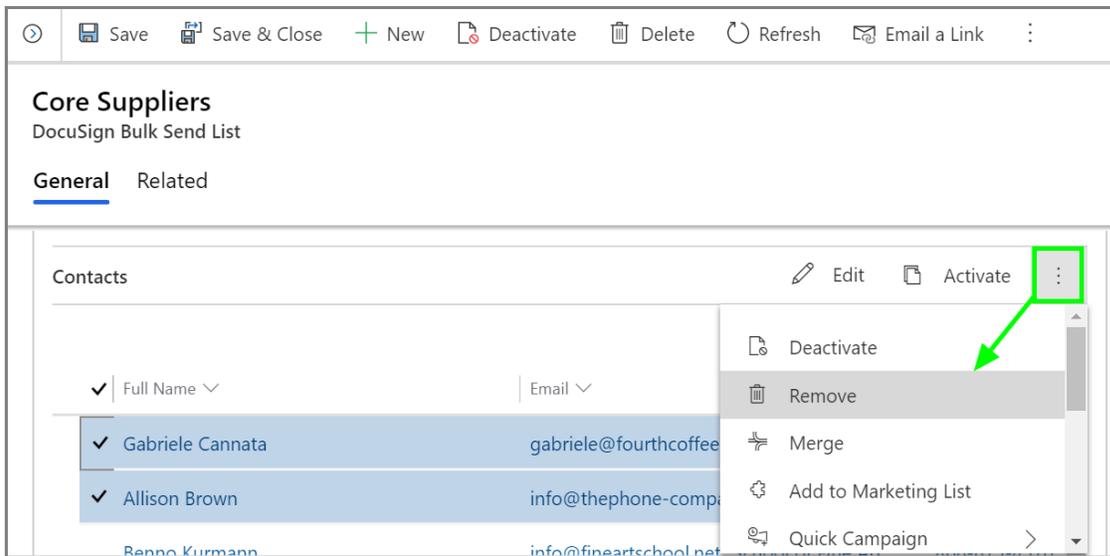
## Edit a Bulk Send Address List (Users)

Learn how users can edit a list of addresses for the Bulk Send feature of DocuSign for Dynamics.

You can add or remove addresses from any Bulk Send list.

### To remove an address:

1. Open a Bulk Send list
2. Select the address to remove by clicking at the left - a check mark should appear

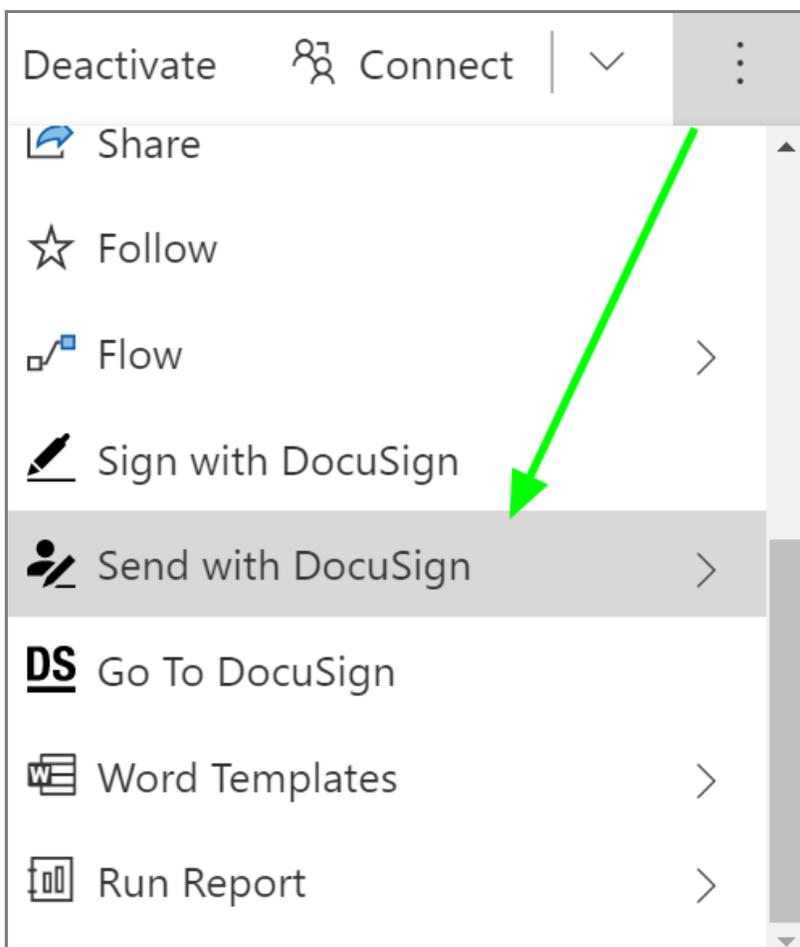


3. Click the three dots and choose **Remove**
4. Click **Save** when you are done

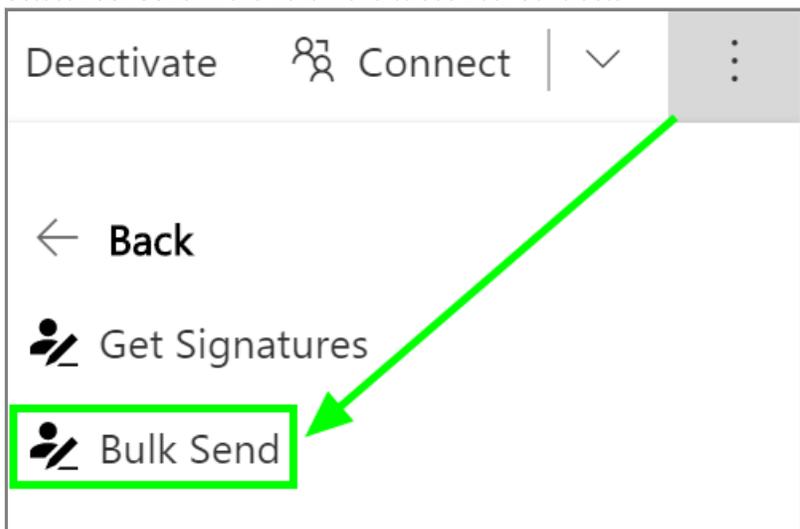
## Send an Envelope Using a Bulk Send Address List

Learn how to send an envelope using the Bulk Send feature of DocuSign for Dynamics.

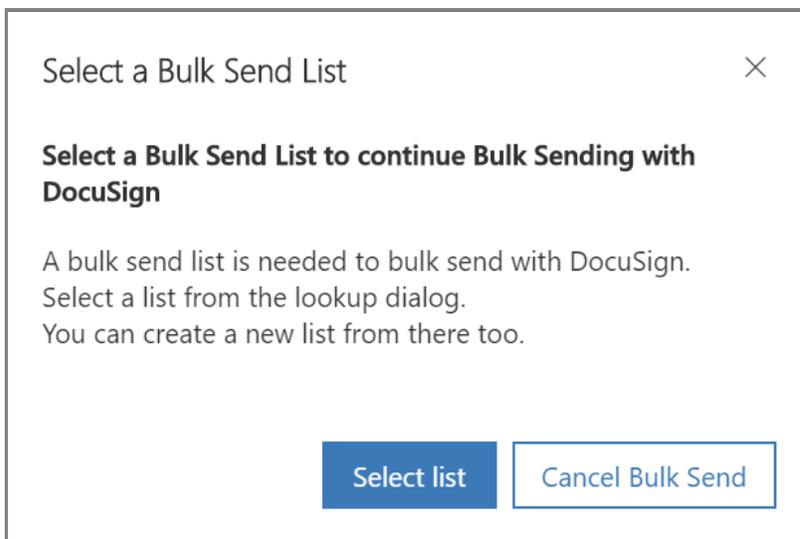
1. To send an envelope, select an Entity, for example, a Contact or an Account, for which an Admin has enabled Bulk Send
2. Click the three-dot menu at the top right and select **Send with DocuSign**



3. Select **Bulk Send** in the next menu to see Bulk Send lists



4. In the **Select a Bulk Send List** dialog, click **Select List**



5. In the next dialog, search for an existing list, or press Enter to see all existing Bulk Send lists
6. Select a list and click **Add**

### Lookup Records

Select record

DocuSign Bulk Send Lists

- Core Suppliers  
Critical suppliers for manufacturing operations
- New Accounts  
List for all of the new accounts this FY
- New Bulk Send List  
New list for testing
- New Bulk Send List August  
List of addresses for August transactions

+ New DocuSign Bulk Send List    Change View

Add    Cancel

7. To use an existing DocuSign template, click **Select Template**

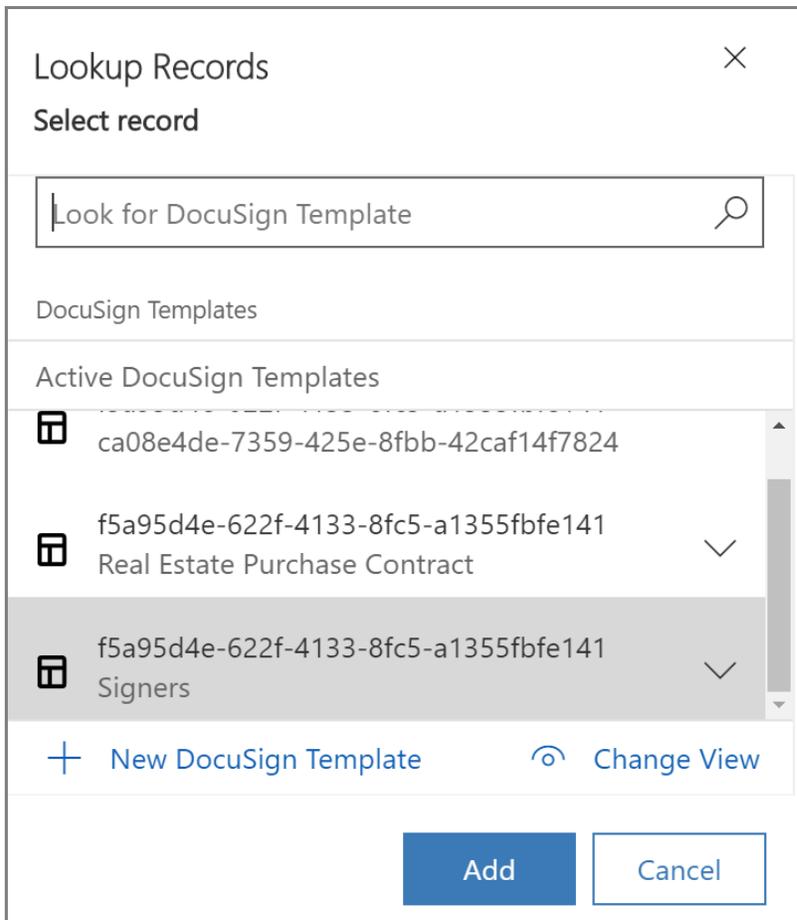
### Optionally use a DocuSign template

Select a template from the lookup

Select a DocuSign template from the lookup dialog.  
You can skip this step and use the attached notes instead.  
Templates shown include Name, Description, and template ID.

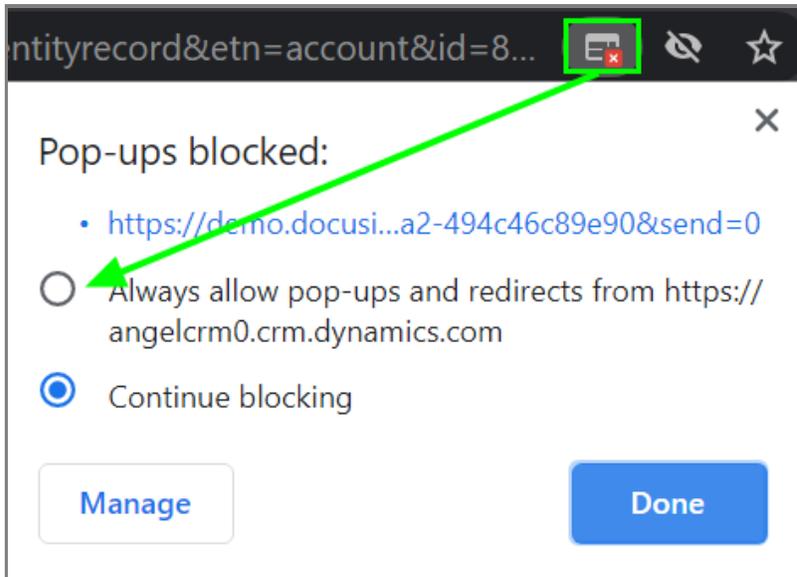
Select template    Use notes instead

8. Search for an existing template or press Return to see all available templates

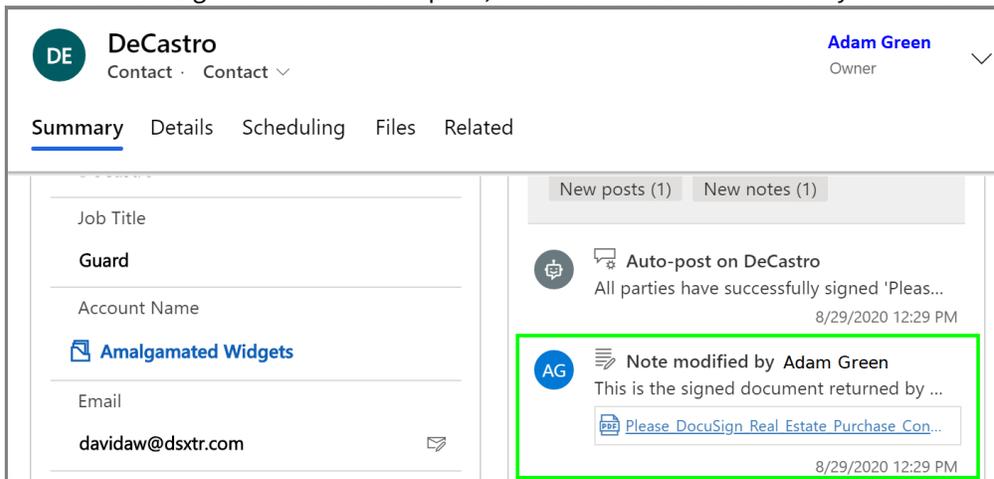


9. Select a template and click **Add**
10. Bulk Send will continue in a new window. Click **Send** to open the DocuSign Prepare page

**Note:** Your browser may prevent the DocuSign pop up window from opening. If this happens, you need to allow pop ups in your browser settings. Below is an example from Chrome:



11. When the DocuSign transaction is complete, the document is saved to the Dynamics record:



## Integrate SharePoint Files

Read about steps to integrate SharePoint files with Dynamics, and how to send a document stored in SharePoint from DocuSign for Dynamics.

If you use SharePoint Online and want to access documents in SharePoint from Dynamics, you can do so after you enable SharePoint document management in Dynamics. When enabled, you can send a document saved in SharePoint. Completed documents are saved back to SharePoint. The DocuSign SharePoint integration uses the default SharePoint site that is configured in Document Management. In addition, SharePoint files are automatically organized by folder and linked to the related Dynamics opportunity, account, etc.

**Important:** You can only link a single SharePoint folder to a Dynamics record. If a record is linked to more than one SharePoint folder, running a workflow from that record will return an error. See [Troubleshooting](#) for more information.

Requirements to access SharePoint documents from Dynamics:

- Integration is only available with SharePoint Online sites in the same tenant as Dynamics
- Integration must use the default **Get Signatures** action, or any other custom action (does not work with Sign)
- Configure document management in Dynamics with server-based authentication (see [this Microsoft TechNet article](#))

## Enable SharePoint file integration

Learn about Administrator tasks to allow DocuSign for Dynamics to access files stored in SharePoint Online.

Go to the Dynamics DocuSign Admin > Settings page. You will be prompted to allow DocuSign for Dynamics to access your SharePoint sites.

**DocuSign** ADMIN

HOME ACCOUNT **SETTINGS** ENTITIES

### Document Settings

**Signed document naming convention**

DocuSign document subject + "\_signed" ▼

**Download signed document as**

Combined PDF ▼

Include a Certificate of Completion with signed documents

**Save completed documents to SharePoint**

DISABLE

### Email Settings

**Default Email Subject**

Please review and sign your document

**Default Email Message**

SAVE

The following image shows SharePoint documents within Dynamics.

ACCOUNT K Corp

Annual Revenue \$100,000,000.00 | No. of Employees 1 | Owner Max Power

Document Associated Grid

NEW | UPLOAD | DOCUMENT LOCATION | ADD LOCATION | OPEN LOCATION | EDIT LOCATION

✓	Name	Modified	Modified by	Document Location	Path
	Discount Approval.docx	9/19/2017 2:18 PM	Max Power	SharePoint	sites/D2/account/K Corp_222E388038CE61180FAFC1...

## Customize DocuSign for Dynamics

Learn about the ways you can customize DocuSign for Dynamics.

With DocuSign for Dynamics Workflows, you can add DocuSign custom activities to your Dynamics processes, such as workflows and actions. With these custom steps, you can specify and generate a DocuSign envelope automatically within a Dynamics process for any Dynamics standard or custom entity. These steps can be part of a Dynamics workflow or part of a custom button.

You can define process steps to create the envelope either from the documents and contacts on an object, or using a template from the DocuSign account used with your Dynamics application. You can also define process steps that map DocuSign fields to Dynamics fields to create merge fields that pull Dynamics data into your document

## Create Custom Buttons

Learn about the steps to create custom buttons to use with DocuSign for SharePoint. See information about combining DocuSign actions with built-in Dynamics actions.

Custom buttons let you customize the UI and also let you use advanced DocuSign features, including recipient authentication, Standards-Based Signatures, template matching, bulk send, private messages, and many more.

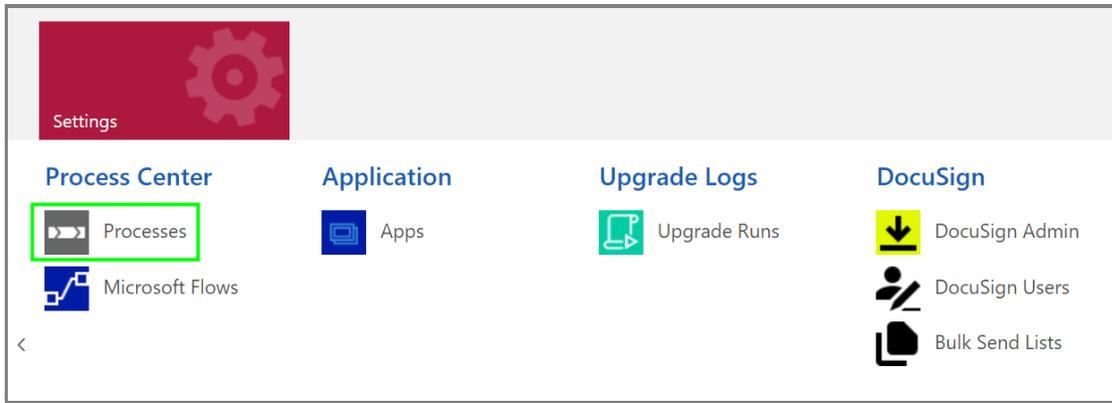
Creating a custom button requires no JavaScript or coding; you use the same workflow components that are already integrated into the Dynamics process framework. You can use any existing components. You can also combine DocuSign actions and built-in Dynamics actions. We've provided a default action, called *Get Signatures*, that pulls attachments from the Dynamics record and creates a draft document and opens it in the Prepare view. This is a global action that works on all entities. Custom buttons that use DocuSign features are populated in the Send with DocuSign menu on entities that are enabled with DocuSign.

There are two restrictions to creating custom buttons:

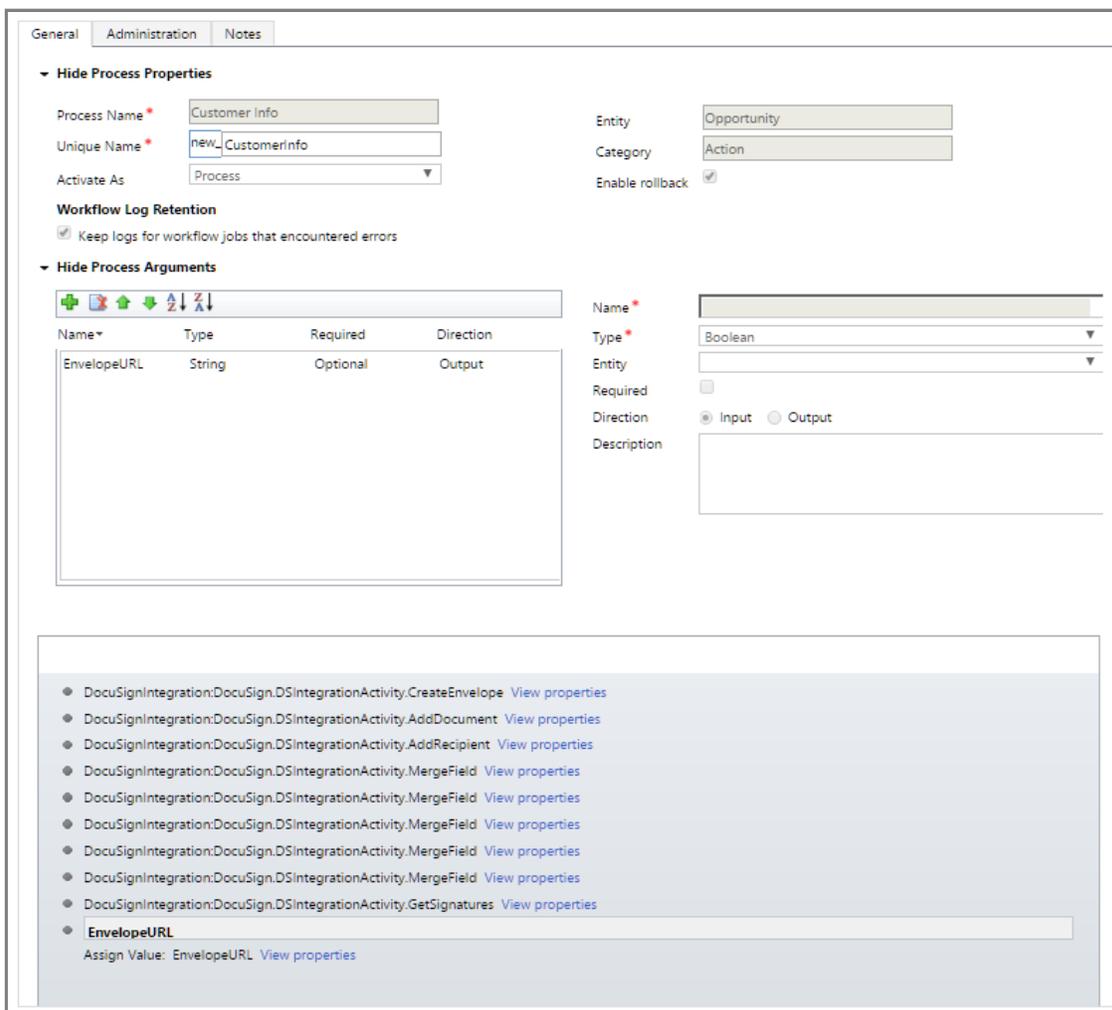
- The default *Get Signatures* action cannot be renamed. All additional custom actions that are added to a record type utilize the name chosen at process creation.
- The action for your custom button must be unmanaged with the default namespace prefix of (new\_). We are not able to dynamically read the namespace prefix.

Follow these steps to create a custom button:

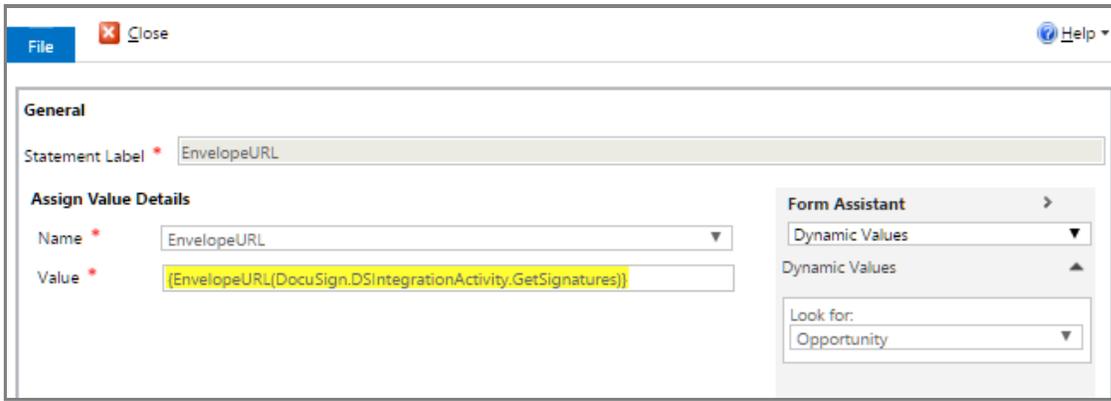
1. Go to the Dynamics Process Center to create an action for your button.



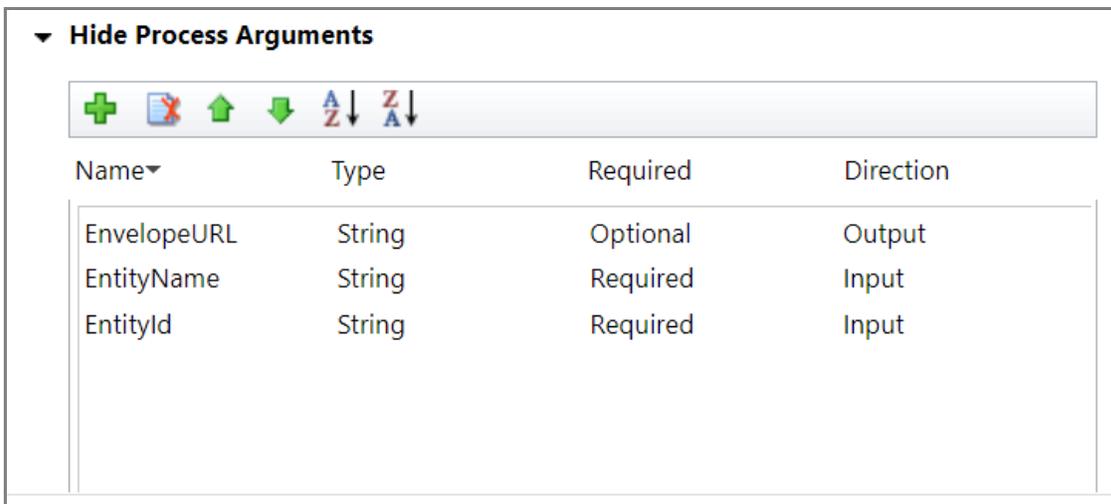
The following image shows an example of an action called Customer Info, which pulls data from an opportunity and creates a document.



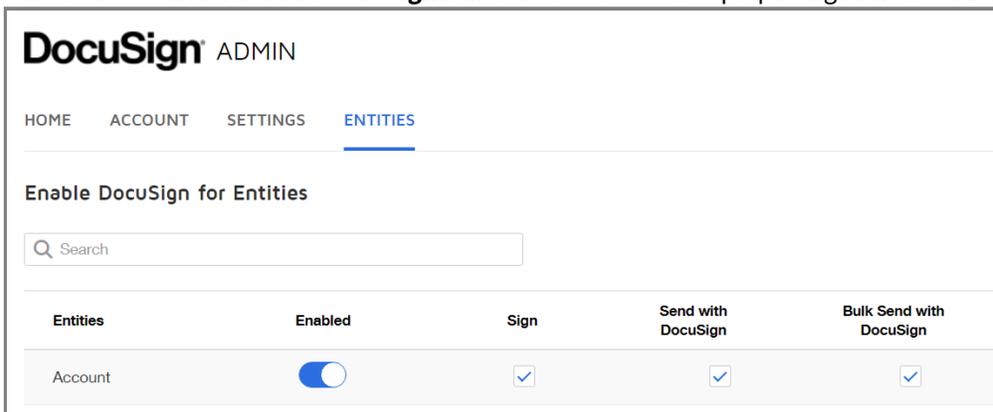
**Note:** When you create an action for a custom button, you must create an output parameter called EnvelopeURL and assign it the URL from the Get Signatures or Get Signing View steps.



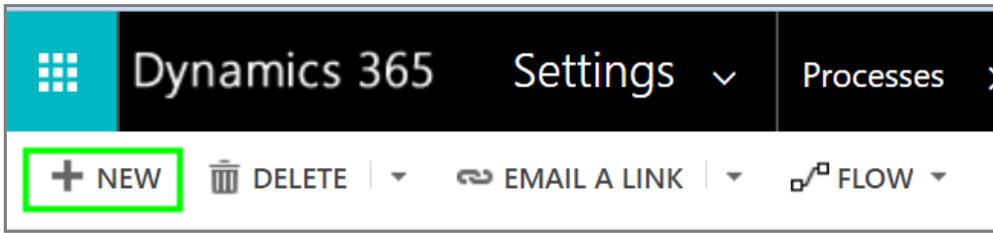
If you create a Global action for a custom button, you must also create two String input parameters in addition to EnvelopeURL called EntityName and EntityId with nothing assigned to them.



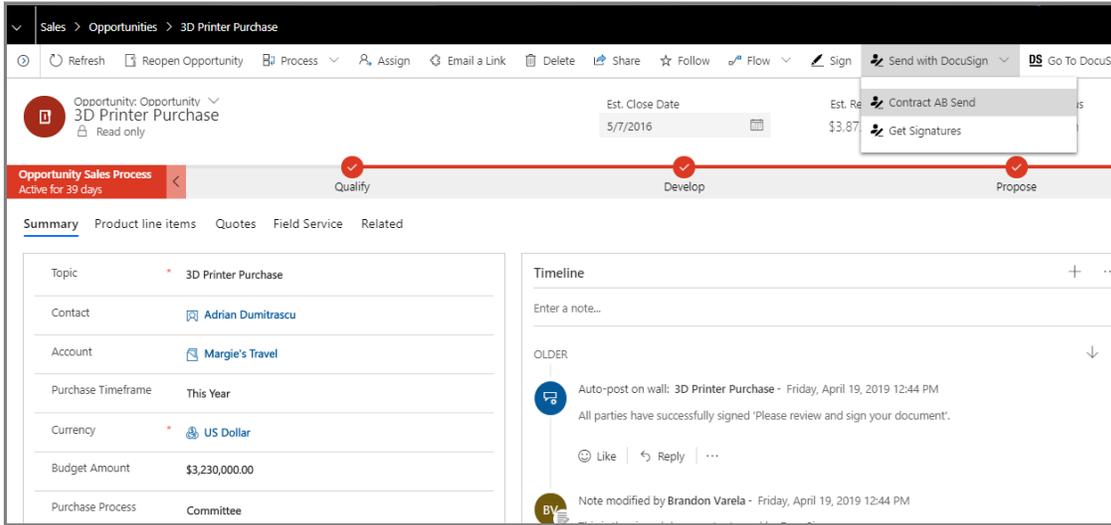
2. After your action is defined and saved, go to DocuSign Admin, and under the Entities tab, check the Send with DocuSign check box. This enables the **Send with DocuSign** sub-menu, which is populated with your new custom action and the default **Get Signatures** action that comes prepackaged with the DocuSign solution.



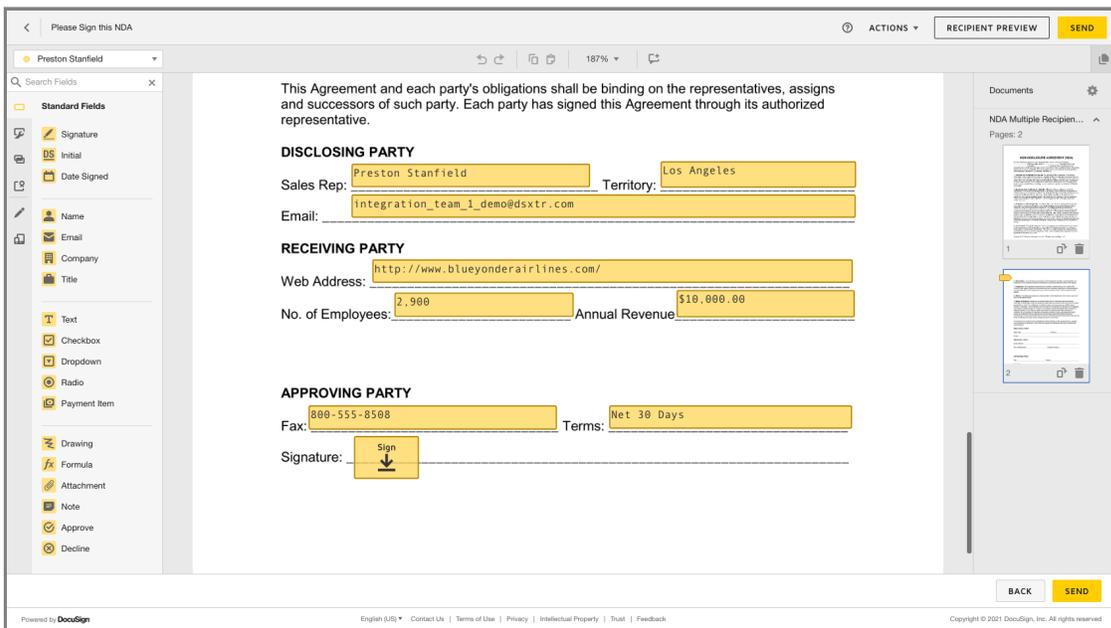
3. In the Process Center, click +NEW to create a new process.



4. Open an opportunity, and then, under the command bar, open the **Send with DocuSign** sub-menu and click **Customer Info**.



The document opens in the DocuSign Add Fields page with information from the opportunity already applied to the document with the Customer Info action.



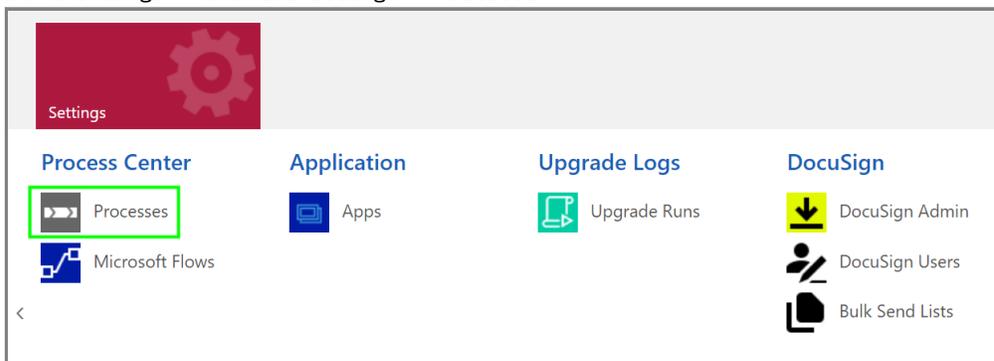
# Add a Custom Button to Send Documents with a Template

Learn how to add a custom button in Dynamics to populate a template and initiate the sending workflow.

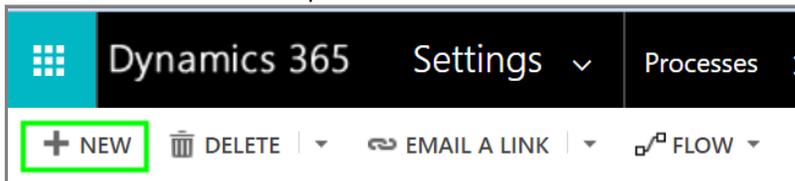
DocuSign templates are a lot like envelopes - they include documents for signature, recipients, and recipient fields. Unlike envelopes, however, templates can also have placeholder recipient roles in addition to specific recipients. Placeholders give the template flexibility - you can reuse the template and fill in the placeholders with different recipients when you send it.

In Dynamics, you can create a workflow that lets you add data from Dynamics to a template and send it for signature, then you can create a custom button to initiate that workflow.

1. Go to the Dynamics Process Center
2. Select Settings > Advanced Settings > Processes



3. Click +NEW to create a new process.



4. In the Create Process dialog:

### Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: \*

Category: \*  Entity: \*

Type:  New blank process  
 New process from an existing template (select from list):

Template Name ↑	Primary Entity	Owner
<div style="border: 1px solid gray; width: 100%; height: 100%; background-color: #f0f0f0; display: flex; align-items: center; justify-content: center;"> </div>		

- Add a Process Name, in this case Send with Template.
- Select Action for the Category.
- Select an Entity from the drop-down menu, for example, Opportunity.
- Select New blank process.
- Select OK when you are done. This opens the Information dialog.

5. Go to the Process Arguments section and enter the following values:

▼ Hide Process Arguments

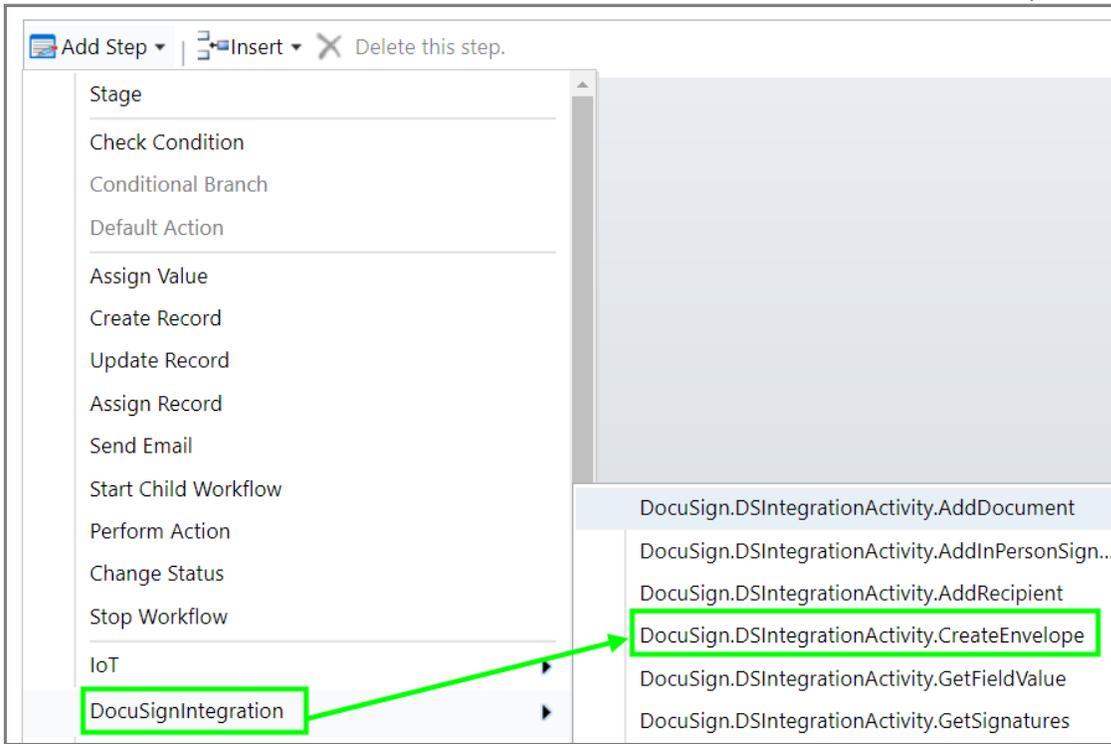
+ ✖ ↑ ↓ ↕ ↕

Name	Type	Required	Direction
EnvelopeURL	String	Optional	Output
EntityName	String	Required	Input
EntityId	String	Required	Input

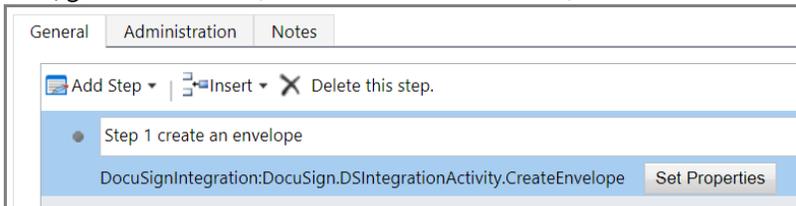
Name	Type	Required	Direction
EnvelopeURL	String	Optional	Output
EntityName	String	Required	Input

Name	Type	Required	Direction
EntityID	String	Required	Input

- Next, add steps to the workflow. To add the first step for this example, scroll down and select DocuSignIntegration > DocuSign.DSIntegrationActivity.CreateEnvelope from the Add Step drop-down menu.



- In the General tab, add a description for the step.
- Next, go to the Add Step section and select Set Properties.



- In the Set Custom Step Input Properties dialog, add a Subject and Message.
- Copy and paste the template ID from DocuSign. Go to your DocuSign account and select Templates > Select your template > Select Template ID > Copy the Template ID.
- Paste the Template ID in the TemplateID field.
- Select Save and Close.
- In the next step, add recipients to the template. Go to Add Step > DocuSignIntegration > DocuSign.DSIntegrationActivity.AddRecipient from the drop-down menu.
- Add a Name and select Set Properties.

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	{Envelope(Create Envelope)}
Name	Single Line of Text	Required	{Contact(Opportunity)}
Email	Single Line of Text	Required	{Email(Contact (Contact))}
Role	Single Line of Text	Optional	Approving Party
RoutingOrder	Whole Number	Optional	

- Add the output value of the Create Envelope Step in the Envelope field.
- Add the name and email address of the recipient. You can use the main contact on the opportunity to dynamically populate these fields from the Dynamics Record.
- Add the role. This should match the role on the template, for example, Approving Party.
- You can add Add Recipient steps to include more recipients.

- Next, add the Get Signatures step. Select Add Step > DocuSignIntegration > DocuSign.DSIntegrationActivity.GetSignatures from the Add Step drop-down menu,
- Add a name and select Set Properties.

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	{Envelope(Create Envelope)}
One Click Send	Two Options	Required	<input checked="" type="radio"/> False <input type="radio"/> True
One Click Options	Option Set	Optional	Prepare

- Use the output of the Create Envelope Step for the Envelope value.
- Select values for One Click Send (optional).
- Select Save and Close

- The last step is to add the envelope URL. Select Add Step > Assign Value. This is the output of the EnvelopeURL parameter.

Statement Label \* EnvelopeURL

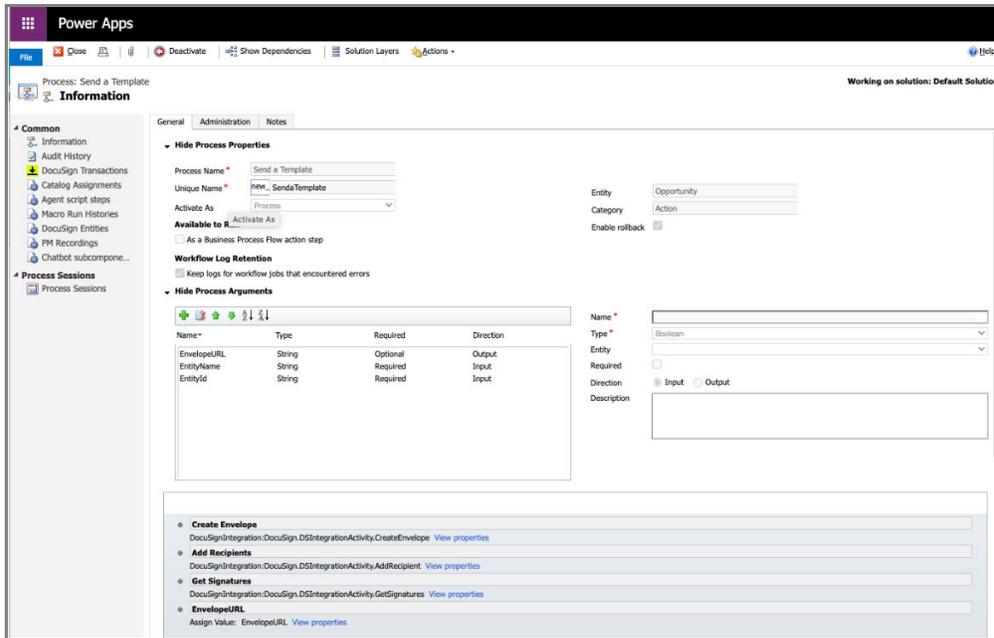
**Assign Value Details**

Name \* EnvelopeURL

Value \* {EnvelopeURL(Get Signatures)}

- When you are done, select Save and Close.

- The completed process should look something like the following:



19. Activate the process and return to Dynamics to begin sending with this custom button.

## DocuSign Custom Activities

Learn about DocuSign's custom activities and how to use them in Dynamics workflows.

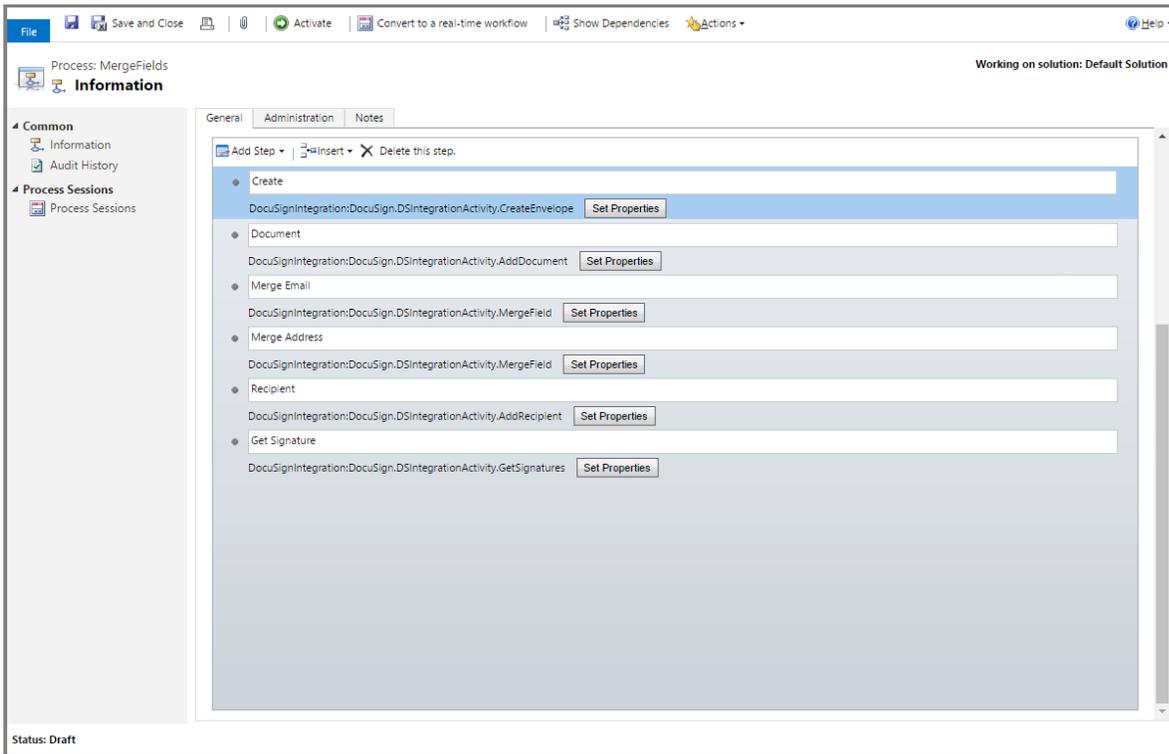
### DocuSign Custom Activities

DocuSign for Dynamics Workflows consists of nine custom activities that are used to create a DocuSign transaction:

- **Create Envelope** - This is the first step in creating a DocuSign transaction. You can also create an envelope from a template by specifying a template ID.
- **Add Recipient** - Use this activity to add recipients to the DocuSign envelope. You can also use it to match recipients to template roles.
- **Add InPerson Signer** - Use this activity to add in-person signers to the DocuSign envelope. You can also use it to match recipients to template roles. The InPerson Signer will not receive an email notification from DocuSign to sign the envelope.
- **Add Document** - Use this activity to add documents to the DocuSign envelope. Documents must be saved in the Notes of the record, or SharePoint, if enabled, on which the custom activity is operating.
- **Get Signatures** - This activity is the final step in creating and sending a DocuSign transaction. You can send immediately, or choose to output the URL for the Add Fields view and not send the document. You can also choose which view opens: Add Fields or Prepare.
- **Get Signing View** - This activity generates a signing URL for use in an in-person signing session.
- **Merge Field** - Use this activity to map DocuSign fields on a document or template to Dynamics fields.
- **Merge Multiple Fields** - Use this activity to map up to 25 DocuSign fields on a document or template to Dynamics fields. This activity saves processing time over using the singular merge field action multiple times.

- **Get Field Value** - Use this activity to access data from completed documents.

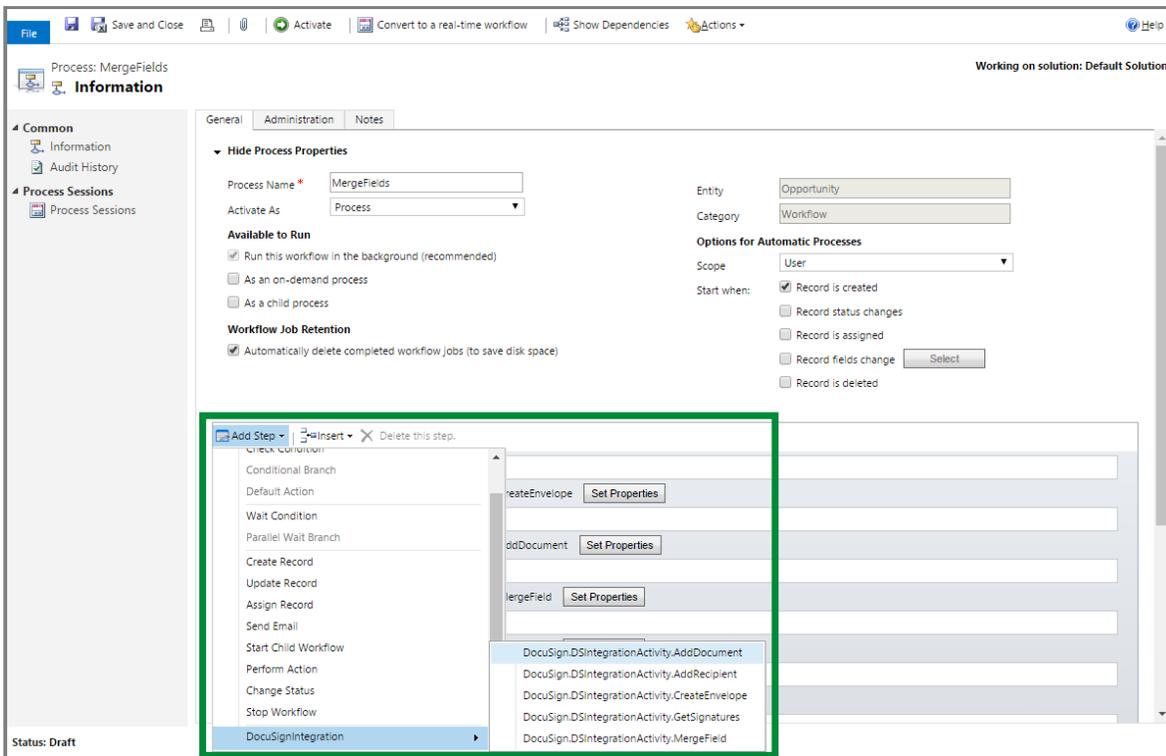
Here is an example of configuring five of the custom activities as part of a Dynamics workflow:



## Add Custom Activities to Process Steps

Learn how to add a DocuSign transaction to a Dynamics process.

To include a DocuSign transaction as part of a Dynamics process, you add the custom activities as steps and define their properties. The custom activities are listed in the Add Step menu, under the DocuSignIntegration selection:



Following are descriptions of the properties of a DocuSignIntegrationActivity step:

## CreateEnvelope

This is always the first step in creating a DocuSign transaction. The properties are all optional.

Property Name	Data Type	Required	Value
Subject	Single Line of Text	Optional	<input type="text"/>
Message	Single Line of Text	Optional	<input type="text"/>
TemplateId	Single Line of Text	Optional	E22B3E76-B4C9-4BD2-8265-37841CA6A

- **Subject:** Specifies a unique Subject line for the envelope. Otherwise, the value specified in the DocuSign Admin is used.
- **Message:** Specifies a unique Message. Otherwise, the value specified in the DocuSign Admin is used.
- **TemplateId:** Specifies an existing template from which to create the envelope. Copy and paste the template ID from the DocuSign sending account.

## Add Document

When included, to support the use of AutoPlace, this should be the second step in the DocuSign process (it *must* come before any Add Recipients steps). Add one Add Document step for each specific document that you want to add to the envelope. Documents are included in the envelope in the order in which you add the Add Document step. Add Document pulls files in Notes and SharePoint (if enabled). All documents are treated as a combined set before the following filters are applied. This step is optional because you can use a template in the Create Envelope step, or you can add documents manually in the DocuSign Add Fields view. You cannot use merge fields, however, when you add a document manually.

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
Filename	Single Line of Text	Optional	<input type="text"/>
Most Recent	Two Options	Optional	<input checked="" type="radio"/> False <input type="radio"/> True

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Filename:** Enter a complete file name to add a specific file, or search for a filename using \* as a wild card. The file name is case insensitive. You can leave this field blank to include everything in Notes and SharePoint (if enabled) for the object. (Optional)
- **Most Recent:** Specifies whether to add the most recent file. If you specify a file in Filename, and there are multiple versions, you can attach all versions (False) or just the latest version (True). If Filename is blank, you can add all files on the object (False) or just the latest file (True). (Optional)

## Merge Field/Merge Multiple Fields

Map labeled DocuSign fields to Dynamics sources to automatically fill the DocuSign fields with Dynamics data. Add one merge field for each DocuSign field you want to fill. This step is optional if you are not mapping any DocuSign fields to Dynamics sources. Merge Multiple Fields works in an identical manner, but allows up to 25 merge actions per recipient instead of one.

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
Recipient Id	Single Line of Text	Required	<input type="text"/>
Tag Label	Single Line of Text	Required	<input type="text"/>
Value	Single Line of Text	Required	<input type="text"/>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)

- **Recipient ID:** This is an output parameter from the Add Recipient activity. (Required)
- **Tag Label:** The DocuSign field label to map to a Dynamics source. The label must be defined in DocuSign before it can be mapped. (Required)
- **Value:** The Dynamics source mapped to the DocuSign label. Data from this source is pushed into the document. (Required)

## Add Recipient

Add recipients to the envelope and match recipients to template roles.

**Note:** Recipients are added as Needs to Sign by default. If you need to assign a different recipient action to someone (for example, Needs to View), then you must use a template and have the template role specify the action.

Process: Send with Template

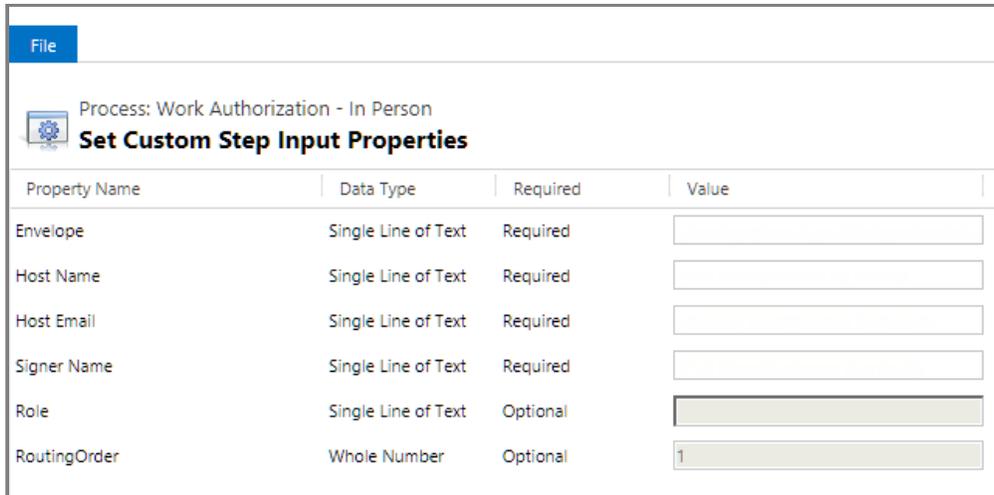
### Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	f7495307074d6-a79c-4a24-b92e
Name	Single Line of Text	Required	Melanie Deschutes
Email	Single Line of Text	Required	mdeschutes@dsxtr.com
CountryCode	Single Line of Text	Optional	01
PhoneNumber	Single Line of Text	Optional	415 555-1212
Role	Single Line of Text	Optional	Approver
RoutingOrder	Whole Number	Optional	1

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Name:** Specifies the recipient's name. (Required)
- **Email:** Specifies the recipient's email address. (Required)
- **CountryCode:** Specifies the country calling code for the recipient's location. May include a + sign. Country code can be included here OR in the phone number field, but not in both. Must be present for SMS sending to function correctly. (Optional)
- **PhoneNumber:** Specifies the phone number for the recipient to receive SMS messages. May include parentheses, dashes and country code, for example +1 (800)–555–1212. (Optional)
- **Role:** Specifies the template role to map to the recipient. (Optional)
- **RoutingOrder:** Specifies where in the signing order to add the recipient. RoutingOrder is not required for envelopes that use a template. (Optional)

## Add InPerson Signer

This activity creates an in-person signer.

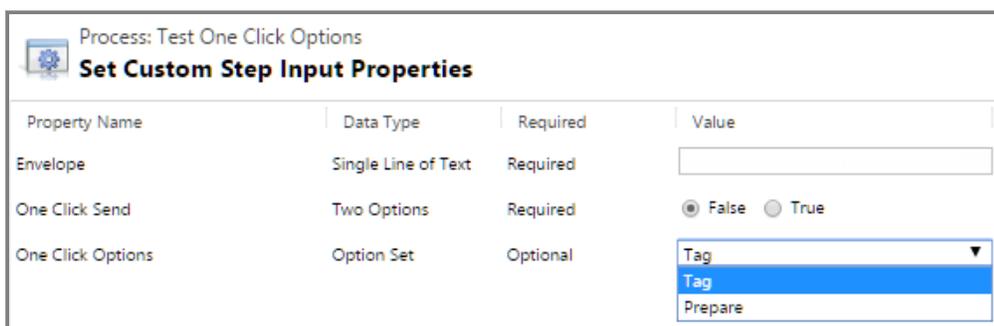


Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
Host Name	Single Line of Text	Required	<input type="text"/>
Host Email	Single Line of Text	Required	<input type="text"/>
Signer Name	Single Line of Text	Required	<input type="text"/>
Role	Single Line of Text	Optional	<input type="text"/>
RoutingOrder	Whole Number	Optional	<input type="text" value="1"/>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Host Name:** Specifies the in-person host's name. (Required)
- **Host Email:** Specifies the in-person host's email address. (Required)
- **Signer Name:** Specifies the in-person signer's name. (Required)
- **Role:** Specifies the template role to map to the recipient. (Optional)
- **RoutingOrder:** Specifies where in the signing order to add the recipient. RoutingOrder is not required for envelopes that use a template. (Optional)

## Get Signatures

This activity is the final step in creating and sending a DocuSign envelope. You can send the envelope immediately or choose to output the URL for the Add Fields view.



Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
One Click Send	Two Options	Required	<input checked="" type="radio"/> False <input type="radio"/> True
One Click Options	Option Set	Optional	<input type="text" value="Tag"/> <ul style="list-style-type: none"> <li>Tag</li> <li>Tag</li> <li>Prepare</li> </ul>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **One Click Send:** Specifies whether to send the envelope immediately. (True) sends the envelope immediately. (False) outputs the URL of the Add Fields view for the envelope, without sending. You can use this URL to program additional actions on the envelope.
- **One Click Options:** Specifies whether to open the DocuSign Add Fields view (Tag) or the Prepare view when getting signatures.

## Get Signing View

Generates the in-person signing session URL for input into the Assign URL action.

**Note:** This activity only available following the Add InPerson Signer activity, and only with a sent envelope.

File

 Process: Work Authorization - In Person  
**Set Custom Step Input Properties**

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
RecipientId	Single Line of Text	Required	<input type="text"/>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **RecipientID:** Specifies the in-person signer. This is the output of the Add InPerson Signer activity. (Required)

## Get Field Value

Access data from a completed document to update fields in Dynamics or to trigger additional workflows.

 Process: Update Opportunity Merge Field  
**Set Custom Step Input Properties**

Property Name	Data Type	Required	Value
Envelope	Single Line of Text	Required	<input type="text"/>
Tag Label	Single Line of Text	Required	<input type="text"/>

- **Envelope:** Identifies the envelope for the process step. This is the output of the Create Envelope activity. (Required)
- **Tag Label:** The DocuSign field label to map to a Dynamics source. The label must be defined in DocuSign before it can be mapped. It must also be unique across all recipients (two recipients cannot have the same tag label). (Required)

The output of the Tag Label is the field value from the DocuSign envelope. It can be formatted as one of: Boolean, Date/Time, Decimal, Double, Integer, Money, or Text.

## Merge Fields: Dynamics to DocuSign

Learn how to merge data fields from Microsoft Dynamics to a DocuSign template and send documents for signature.

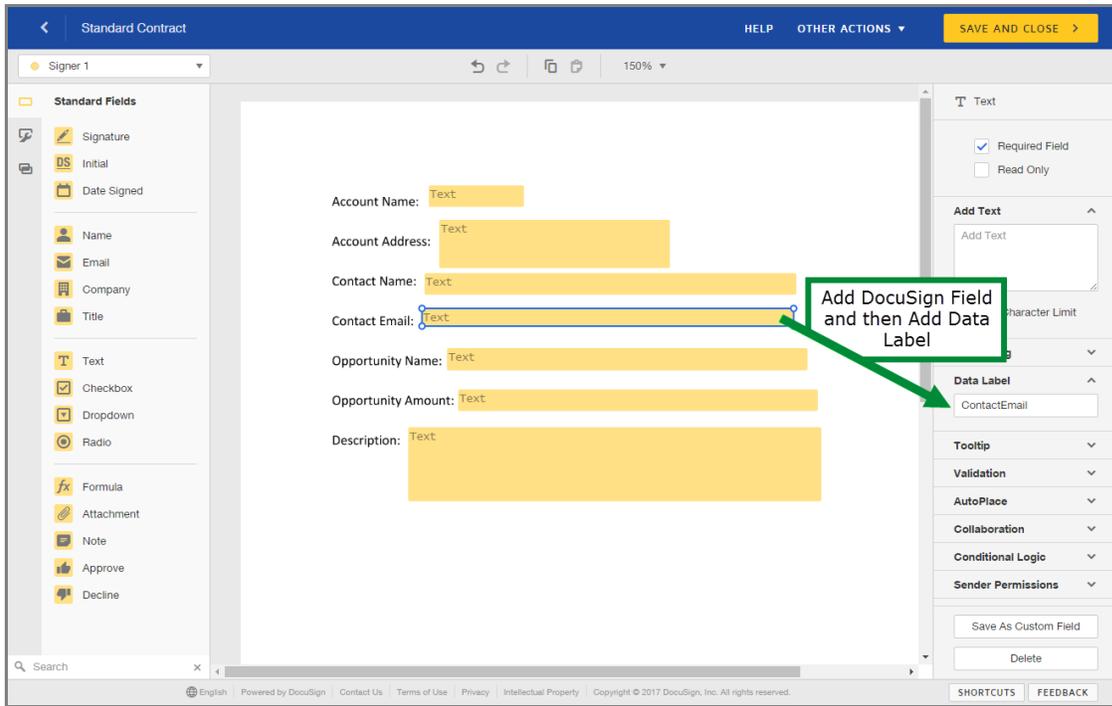
Merge Fields link data to automatically populate information from Dynamics to a DocuSign agreement.

To merge field data from Dynamics to DocuSign:

1. In DocuSign, start by [Create Templates](#). When you add signing fields, add a Data Label for each field. Data labels are used to map the DocuSign signing fields to a corresponding Dynamics field when merging data between Dynamics and DocuSign.

**Note:**

- Merge Fields support all DocuSign field types except radio buttons and drop-down lists.
- Merge Fields do not support one-to-many relationships, such as merging multiple products related to an Opportunity.
- To use Payments with merge fields, set up the payment as a formula field and reference a number field into which you merge data.



2. Configure a custom process in Dynamics.
  - a. Go to Settings > Processes > New
  - b. Add a process name.
  - c. Select Action for the Category
  - d. Select the Dynamics entity where your custom process will appear in the DocuSign menu.

**Important:**

Your custom process will be automatically prepended with new\_. Do not modify this otherwise the DocuSign connector will not detect your custom process.

3. Create three process arguments

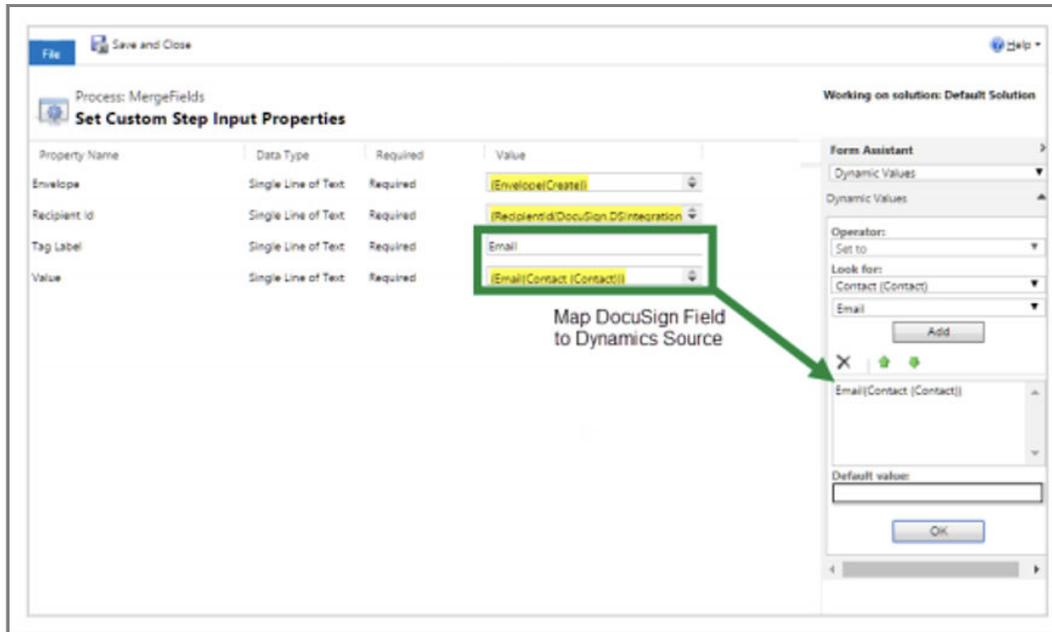
Name	Type	Required?	Direction
EnvelopeURL	String	Not Required	Output
EntityName	String	Required	Input
EntityId	String	Required	Input

4. Add process steps. Custom processes will differ based on use case and specific settings. The example below describes how to merge data from Dynamics to a DocuSign template.
  - a. CreateEnvelope
    - i. Add Step > DocuSignIntegration > DocuSign.DSIntegrationActivity.CreateEnvelope
    - ii. Add a description
    - iii. Click Set Properties
    - iv. (Optional) Add an email subject and message

- v. Copy and paste the Template ID from DocuSign. The Template ID can be found in docusign.net > Templates > [Template Name]
  - vi. Select Template ID in top left corner and copy it.
- b. AddRecipient
- i. Add Step > DocuSignIntegration > DocuSign.DSIntegrationActivity.AddRecipient
  - ii. Add a description
  - iii. Click Set Properties
  - iv. For Envelope, select the output of the CreateEnvelope step. Look for Local Values > [the description you added in step ii of the Create Envelope step]
  - v. For Name and Email, hard-code a recipient or you can choose to dynamically populate from Dynamics. For example, you can populate with the primary contact on the Dynamics record.
  - vi. For Role, hard-code with the DocuSign role from the Template
  - vii. (Optional) RoutingOrder: specify the order of signing for this recipient
- c. MergeField
- i. Add Step > DocuSignIntegration > DocuSign.DSIntegrationActivity.MergeField.

**Note:** If you need to merge more than one field, select DocuSign.DSIntegrationActivity.MergeMultipleField

- ii. Add a description
- iii. Click Set Properties
- iv. For Envelope, select the output of the CreateEnvelope step. Look for > Local Values > [the description you added in step ii of the Create Envelope step]
- v. For Recipient Id, select the output of the AddRecipient step for the corresponding recipient. Go to Look For > Local Values > [the description you added in step ii of the AddRecipient step].
- vi. Tag Label: Data label of the signing field in the DocuSign template
- vii. Value: the Dynamics field you want to link. Select the field using the Look for menu on the right.



- d. GetSignatures
  - i. Add Step > DocuSignIntegration > DocuSign.DSIntegrationActivity.GetSignatures
  - ii. Add a description
  - iii. Click Set Properties
  - iv. For Envelope, select the output of the CreateEnvelope step. Look for Local Values [the description you added in step ii of the Create Envelope step].
  - v. (Optional) One Click send, when True, will skip the Prepare and Add Fields steps in DocuSign.
  - vi. (Optional) One Click Options allows you to select the landing page when entering DocuSign from Dynamics
- e. EnvelopeURL
  - i. Add Step > Assign Value
  - ii. Add description
  - iii. Click Set Properties
  - iv. For Value, select the output of the GetSignatures step. Go to Look for > Local Values > [the description you added in step ii of the GetSignatures step].
  - v. Save your custom process and click Activate.
  - vi. Navigate to the Dynamics record. Click Send with DocuSign > [your custom process].

## Merge Fields: DocuSign to Dynamics

Learn how to use Merge Fields to update records in Dynamics after an envelope is completed.

You can also use Merge Fields to update records in Dynamics when a DocuSign envelope is completed. Follow these steps:

1. Create a workflow on the DocuSign Transaction entity. This workflow should run when Envelope Status changes.
2. Use the Check Condition action to see whether the Envelope Status is completed (you can see all status codes here.)
3. Add a condition for the specific entity, if needed (e.g., opportunity lookup contains data). Scope = Organization
4. Use the Get Field Value activity to get the value of the field. NOTE: The tag label must be unique across all recipients in the envelope.
5. Use Update Record to update the record with the value from Get Field Value.
  - The associated record is the relevant lookup, depending on the entity.
  - Use the appropriate output value based on the data type needed.

## Autoplace Fields in Custom Buttons

Learn how to use Autoplace with Custom Fields in Dynamics workflows and Custom Buttons.

DocuSign for Dynamics supports standard AutoPlace functionality. AutoPlace can only be used in workflows and custom buttons. AutoPlace allows text to be used in documents as a placeholder for signature, initial, or other fields for recipients. You manually place the text into your documents where you want each recipient to take some action. When you send the document using DocuSign, the appropriate DocuSign fields are placed in the AutoPlace locations.

Here's how AutoPlace works:

1. Create a custom field with the AutoPlace text . The AutoPlace text must end with {r}; for example, the AutoPlace text for a signature placeholder is \s{r}\.

**Note:** You can only use AutoPlace on shared custom fields.

**Name**

Sign me

Relate to Salesforce

First, create a [Salesforce connect configuration](#) then return here.

**Type**

Sign Here ▼

Shared

---

**Advanced**

**Tooltip**

**AutoPlace Text**

\s{r}\

2. The following table shows the AutoPlace text to use in custom fields for different file types.

Field Type	AutoPlace Text
Signature	\s{r}\
Initial	\i{r}\
Optional Initial	\oi{r}\
Name	\n{r}\
Company	\co{r}\
Title	\t{r}\
Date Signed	\d{r}\

3. Create an envelope using workflows or a custom button.
4. Add recipients to the envelope with the Add Recipient activity. Each recipient you add is assigned an ID. The first recipient you add is assigned 1, the second is assigned 2, and so on. This is the order in which you add recipients with Add Recipient, not the signing order.

5. Enter the AutoPlace text in the document with the recipient ID in place of {r}. For example:
  - To add a Signature tag for the second recipient, enter \s2\ in the document.
  - To add a Company tag for the third recipient, enter \co3\ in the document.
  - To add a Title tag for the first recipient, enter \t1\ in the document.
6. After entering the AutoPlace text, change the color of the AutoPlace text to white or to the background color of the document. This makes the AutoPlace text invisible to document recipients.

**Note:** DocuSign adds the fields to each text location where that AutoPlace text appears.

## Track Agreement Status

Learn how to use the DocuSign Transactions menu to track the status of envelopes.

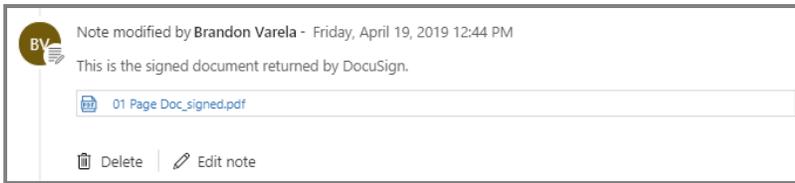
You can track the status of an agreement by selecting the DocuSign Transactions menu. Click **Related > DocuSign Transactions**. A table will display the agreement data, including the Envelope Status.

The screenshot displays the Microsoft Dynamics 365 interface for an opportunity named '3D Printer Purchase'. The breadcrumb trail is 'Sales > Opportunities > 3D Printer Purchase'. The top navigation bar includes options like Refresh, Reopen Opportunity, Process, Assign, Email a Link, Delete, Share, Follow, and Flow. The main content area shows the opportunity details, including the 'Opportunity Sales Process' (Active for 34 days) with stages 'Qualify' and 'Develop'. A 'Summary' tab is selected, showing a table of related items:

Topic	3D Printer Purchase
Contact	Adrian Dumitrascu
Account	Margie's Travel
Purchase Timeframe	This Year
Currency	US Dollar
Budget Amount	\$3,230,000.00
Purchase Process	Committee
Description	3D Printer Purchase

The 'Related' menu is open, showing options like Activities, Connections, Audit History, Documents, Playbooks, Opportunity Project Price Lists, and DocuSign Transactions (highlighted). The 'Related - Field Service' section includes Work Orders. The right-hand side of the interface shows a 'Notes' section with a note: 'Auto-post on wall: 3D Printer Purchase - All parties have successfully signed 'Pleas...'. Below the note are attachments: '01 Page Doc\_signed.pdf' and 'Faux Contract.docx'.

When all recipients have completed their actions, the signed document is stored as a PDF attachment in the Notes section, or in SharePoint if you have enabled the SharePoint integration.

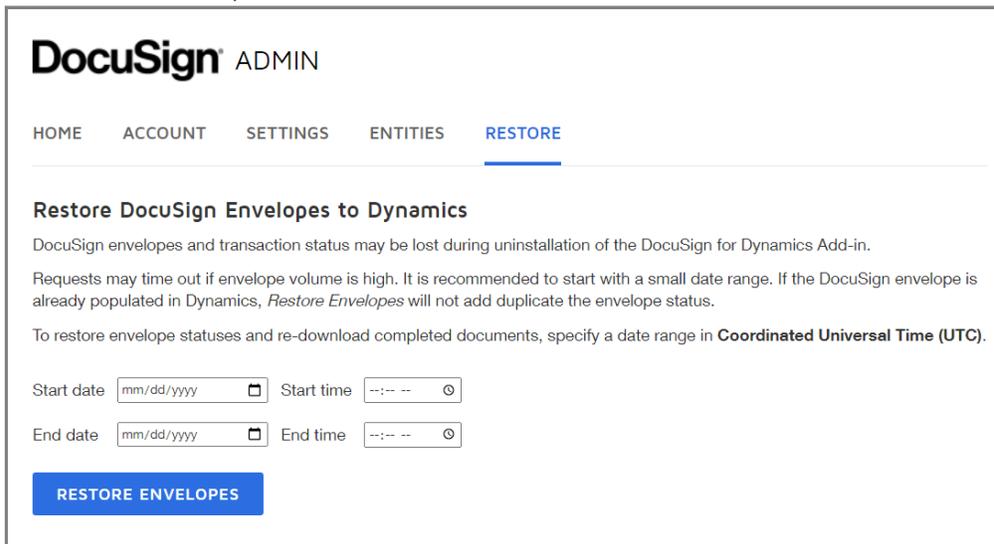


## Restore Envelopes

In rare cases, DocuSign transaction statuses and copies of completed documents may fail to write back to Dynamics due to network issues or other episodic interruptions. Additionally, if DocuSign for Dynamics is uninstalled all transaction statuses are lost.

Restore Envelopes enables the recovery of all DocuSign documents and will update the transaction statuses in each Dynamics record. DocuSign will not duplicate any documents that are already present in Dynamics.

1. Select the Restore tab in the main account window.
2. Click Restore Envelopes



## Enable Plug-in Trace Logs for Client-side Debugging

The DocuSign for Dynamics connector is split into two parts: a client-side package installed via Microsoft AppSource, and a server-side component hosted by DocuSign. DocuSign can capture logs for server events, but you must enable plug-in trace logs to debug client-side issues.

To enable plug-in trace logs:

1. Go to Settings > Administration > System Settings > Customization > Plug-in and custom workflow activity tracing

2. Select **Enable logging to plug-in trace log**.
3. Repeat the action that is causing the problem (e.g. Get Signatures, run a workflow).
4. Open **Advanced Find** from the funnel icon at the right side of the ribbon.
5. Capture the plug-in trace logs using the DocuSign Diagnostic Query and the DocuSign Workflow Diagnostic Query.
6. Select **Results** to view the logs.
7. Download the logs to Microsoft Excel for further analysis.

**Note:**

- You can disable logs at any time
- Microsoft Dynamics deletes logs after 24 hours have elapsed.

## Troubleshooting

Learn how to troubleshoot some common issues

Troubleshooting Issues for DocuSign for Dynamics.

### Error: An unexpected error occurred from ISV code

Situations that cause an error creating a SharePoint folder and how to solve them.

Error: An unexpected error occurred from ISV code. (ErrorType = ClientError) Unexpected exception from plug-in (Execute): DocuSign.DSIntegrationActivity.GetSignatures: System.Exception: Object reference not set to an instance of an object. Expanding the error shows **Error creating SharePoint folder for /Entity\_Name, Error creating SharePoint folder for /Entity\_Name**.

**This occurs when running a workflow from a record linked to multiple SharePoint folders.**

Make sure that a Dynamics record is only linked to a single SharePoint folder before running the workflow.

### Error: The refresh token has expired due to inactivity (or completed envelopes do not write back within 90 days of sending).

Learn how to restore envelopes that have not written back to Dynamics after 90 days.

If the error message The refresh token has expired due to inactivity appears, or if an envelope isn't completed within 90 days of sending, the completed document will not write back to Dynamics.

**Solution: Restore completed envelopes.**

To restore an envelope that has not written back upon completion, please see [Restore Envelopes](#).

## **Error: Request not supported: new\_{CustomWorkflowName}**

Situations that cause errors in custom actions and how to solve them.

Invalid publisher prefix in custom action.

Check the publisher prefix. DocuSign uses the default publisher prefix *new\_* or the unique prefix *docusign\_*. If you have created a custom action with a different publisher prefix, an error occurs.

1. To check the publisher prefix, go to Settings > Customizations > Publishers. If you have changed the default publisher prefix assigned to a DocuSign process, you need to rename it to *new\_*.
2. If this solution is unavailable, an alternative is to create an unmanaged solution that will hold all custom actions for DocuSign and assign it to a publisher with the prefix *new\_*.
3. If you have any questions or need more assistance, please contact [DocuSign Support](#).

## **Error When Reading from or Writing to a SharePoint Record**

Learn how to remedy a Dynamics error when reading or writing to a SharePoint record.

Dynamics may show an error when attempting to send an envelope from a SharePoint record or when attempting to write an envelope back to the SharePoint record.

**Solution: Confirm that a SharePoint folder exists for the record in question**

1. Go to the Documents tab on the record.
2. Select Open Location, which either opens an existing location or creates a new one if it does not yet exist.
3. When you have confirmed that a SharePoint folder exists for that record, sending an envelope from the record or writing an envelope back should no longer cause an error.

## Errors when accessing the DocuSign Admin page

One or more of the following issues or errors occur when accessing the DocuSign Admin page:

1. Entities enabled in the Entities tab in DocuSign Admin do not stay enabled.
2. Error message: An unknown error has occurred. Please open a case by visiting [DocuSign Support](#).
3. Error message: Only Admins are able to create or edit DocuSign account configurations.

These errors occur because the Admin user is not in the same business unit as the user who configured the DocuSign account credentials. (The user's business unit can be found on their details page in the Organization Information section.)

To remedy these issues, log in as a DocuSign Admin user in the same business unit as the user that originally configured DocuSign for Dynamics.

## Release Notes

Release notes for version 7.0 of DocuSign eSignature for Microsoft Dynamics.

The most recent changes to DocuSign for Microsoft Dynamics are:

### Version 7.1 - April, 2022

- DocuSign eSignature for Microsoft Dynamics now supports the ability to select files from SharePoint subfolders. Users can select any file in SharePoint associated with the Dynamics entity.
- Added the ability to disable saving completed files to Dynamics.
- Added option to enter SMS phone number for DocuSign notifications.
- Added a notification when an envelope created with a Dynamics workflow is not sent.

### Version 7.0 - August, 2021

- Flexibility to select specific documents to sign or send for signature.
- Add contacts from Dynamics as DocuSign envelope recipients.
- Restore envelopes for selected time period that failed to write back or were lost upon uninstall/reinstall.

### Version 6.6 - March, 2021

- DocuSign now launches in a new browser tab.
- On a mobile device, launching DocuSign will direct users to the DocuSign mobile app.

### Version 6.5 - February, 2021

- Performance improvements to Sign Attachments and Get Signatures with DocuSign.

### Version 6.4 - August, 2020

- Bulk Sending

**Version 6.3 - August, 2019**

- Ability to select partner data center to which to connect.
- Better error messaging.
- Various bug fixes.

**Version 6.2 - June 25, 2019**

- Updated error received when insufficient permissions from “An unknown error has occurred” to “You do not have permission to access this page.”
- Fields now respect formatting properties in regards to font type, color, size, italic, bold, and underline.
- Fixed an error where user was redirected to the login screen after configuration instead of the admin screen.
- Support added for all DocuSign servers globally (AU, CA, EU, NA, etc.).
- Created a new custom workflow action known as multi-merge that allows up to 25 merge fields to be written in a single action.
- Fixed a problem with merge fields not writing back when Sign in Person was used.
- Fixed a problem where merge field write-back was failing under specific circumstances.
- Fixed a problem with formula fields not working when number formatting was set to 1.000,00 instead of 1,000.00.
- The Unified Interface for Dynamics 365 is now supported.
- Miscellaneous performance improvements and other minor system fixes.

**Version 6.1 - July 19, 2018**

- All references to AutoPlace text have been removed until a bug preventing this feature from working in Dynamics is fixed
- Multiple custom buttons- Administrators can now select any number of custom actions that they can assign to a given entity from a menu on the entity itself.
- Fixed a bug where having “Most Recent” selected in the Add Document workflow activity would cause an error.
- Fixed a bug that was causing an “Unknown error occurred” message to be displayed after successful completion of the Get Signatures guided sending flow.
- Security improvements (TLS 1.2 support)

**Version 6.0 - November 2017**

- Merge Field write back - It is now possible to write DocuSign data back to Dynamics fields through a workflow that can update fields, initiate another workflow, send an email, etc.
- SharePoint Online integration - you can now send documents from and save to SharePoint Online when you enable the server-to-server integration between Dynamics and SharePoint built in to Dynamics.
- Get Signatures Deprecated - Starting with v6.0, new customers will have the Send with DocuSign custom button enabled instead of using Get Signatures. Existing customers will be migrated to the Send with DocuSign in v6.1; until then, Get Signatures will function as usual.
- To use Payments with merge fields, set up the payment as a formula field and reference a number field into which you merge data.
- We now show the user-friendly name in the Entities tab on the DocuSign Admin page. To see the API name, hover over the Entity.

- You can use wild card (\*) search when looking for documents to add to an envelope.
- Fixed a bug with in-person signing when using a template with a role placeholder.
- Added a custom button recipe video to the Admin page.