Quick Start Guide

DocuSign for Microsoft Dynamics CRM 2011 — 2.0.2

Published April 2016

IMPORTANT: The DocuSign for Dynamics CRM 2011 integration is reaching the end of support. Updates for critical security issues will cease as of October 1, 2016. Self-help online support, including user guides, FAQs, and community forums, will continue to be available. Existing customers may continue to use the integration after this date, subject to the support time line above.

For the latest version of the DocuSign for Dynamics integration, please see our Dynamics CRM Online solution. Questions? Contact us at dyn@docusign.com.

Overview

This guide provides information on installing and sending documents for signature with DocuSign for Microsoft Dynamics CRM 2011. The Release Notes for DocuSign for Microsoft Dynamics CRM 2011 provide additional release details.

Versions Supported

DocuSign for Microsoft Dynamics CRM 2011 supports the following clients and browsers:

- Dynamics CRM 2011 On Premise – Internet Explorer 8, 9, and 10
- Outlook Client 2010

Note: The DocuSign application can only be installed by Microsoft Dynamics CRM administrators. If you have a DocuSign account, the **Account-Wide Rights** and **Send On Behalf Of Rights (API)** features must be enabled for your account.

Installing DocuSign for Microsoft Dynamics CRM 2011

The DocuSign for Microsoft Dynamics CRM 2011 application is available from Microsoft Pinpoint and through a link on the DocuSign Partner Solutions Showcase.

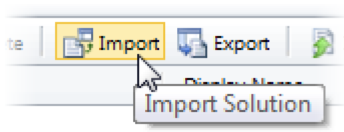
This topic includes information on the following:

- Installing the DocuSign application
- Configuring the DocuSign application

You must be a Microsoft Dynamics CRM administrator to perform the tasks in this topic.

Install DocuSign for Dynamics CRM

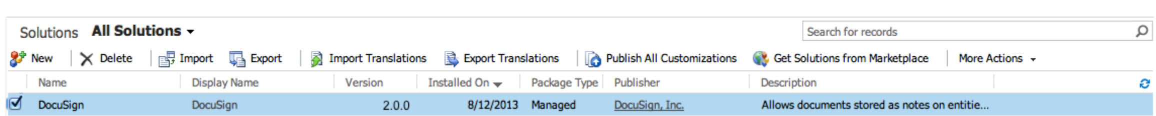
1. **Get DocuSign for Microsoft Dynamics CRM 2011.**
   a. Go to Microsoft Pinpoint and locate the DocuSign for Microsoft Dynamics CRM application. You can also download the app through the link on the DocuSign Solutions Showcase.
   b. Download the application as a zipped file to your computer.
2. **Import the application into Microsoft Dynamics CRM 2011**
   a. Log on to your Microsoft Dynamics CRM account. In the Navigation Pane, click **Settings**.
   b. Under Customization, click **Solutions**.
   c. On the Action toolbar, click **Import**.



   The Select Solution Package dialog box appears.

   d. Click **Browse**, select the DocuSign solution zip file, and click **Next**. In the Solution Information dialog box, click **Next**.
   e. In the Import Options dialog box, select **Activate any processes and enable any SDK message processing steps included in the solution**, and then click **Next**.

   DocuSign for Microsoft Dynamics CRM 2011 is installed and DocuSign appears in your list of solutions:



f. Finally, you need to send an envelope to configure your account by entering your DocuSign credentials or creating a free DocuSign account. See the following procedure for information on sending.

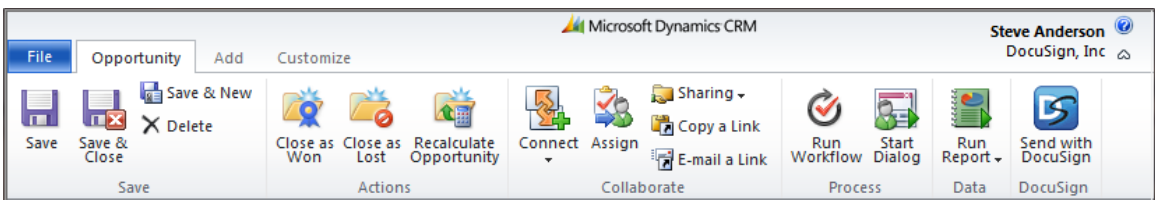
> **Note**: This installation directs your account to the DocuSign Production environment, but you can change the environment. See the FAQs for more information about changing your DocuSign environment.

Sending Documents for Signature with DocuSign

With DocuSign for Microsoft Dynamics CRM 2011, you can send documents for signature directly from records in Dynamics CRM. The default entities supported are Opportunity, Account, Contact, and Lead.

Additional custom entity types are supported, but must be enabled by your Microsoft Dynamics administrator. See the FAQs for information on adding the DocuSign send functionality to custom entities.

The **Send with DocuSign** button is added to the ribbon bar for all of the entities that have been enabled with DocuSign by your Microsoft Dynamics administrator.



1. Select an Entity

a. Select an entity and open the record from which you want to send documents.

b. On the ribbon bar, click **Send with DocuSign**.

A new browser window opens and a DocuSign envelope is created.

> **Note**: If this is the first time sending an envelope from this Microsoft Dynamics CRM account, the system asks you to **Enter your DocuSign Credentials** or **Create a new DocuSign Account**. Follow the on-screen instructions to enter your credentials or create a free DocuSign account.

2. Set Recipients and Documents

Documents included in the entity's Notes and Attachments section are automatically included in the envelope. Recipients are added to the envelope based on the entity type as follows:

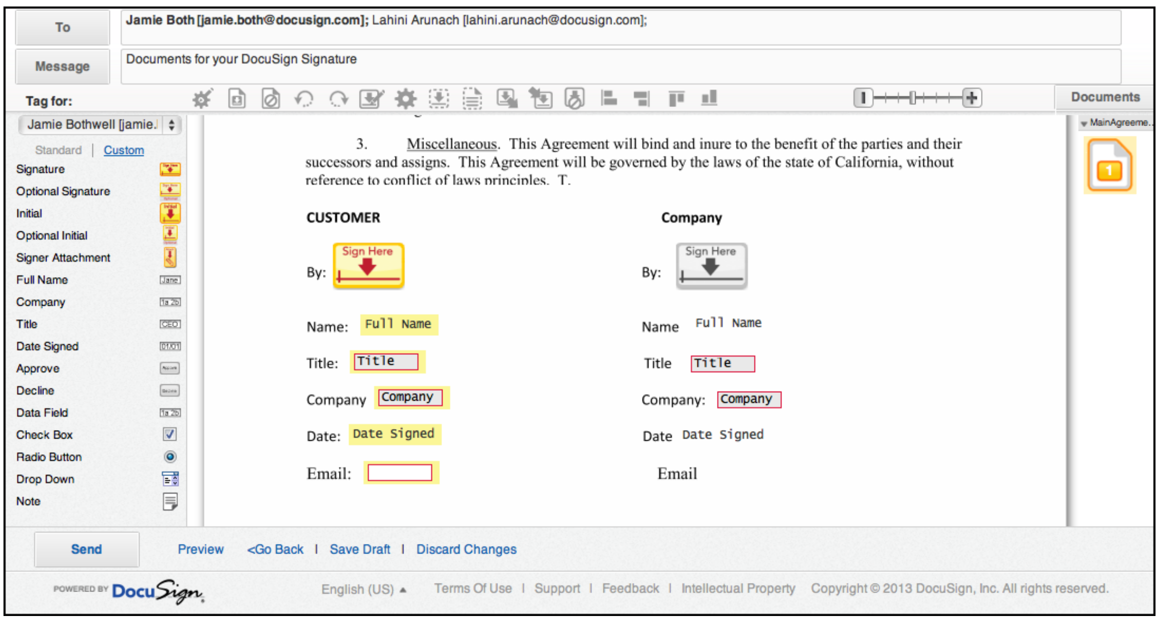
- **Opportunity** - the Contact is added as the envelope recipient
- **Account** - the Primary Contact is added as the envelope recipient
- **Contact** - the Contact is added as the envelope recipient
- **Lead** - the Lead is added as the envelope recipient

You can modify the envelope by clicking the following:

- **To** - to add, remove or modify recipients
- **Message** - to change the e-mail subject and message
- **Documents** - to add or remove the documents from the envelope

3. Tag and Send Your Documents

a. Drag and drop DocuSign tags from the left-hand palette onto your document.



Refer to the *Quick Start – Sending a Document* or *DocuSign Service User Guide* on the DocuSign website for more details about completing your envelope

b. Click **Preview** to preview how your recipient will see the tags.

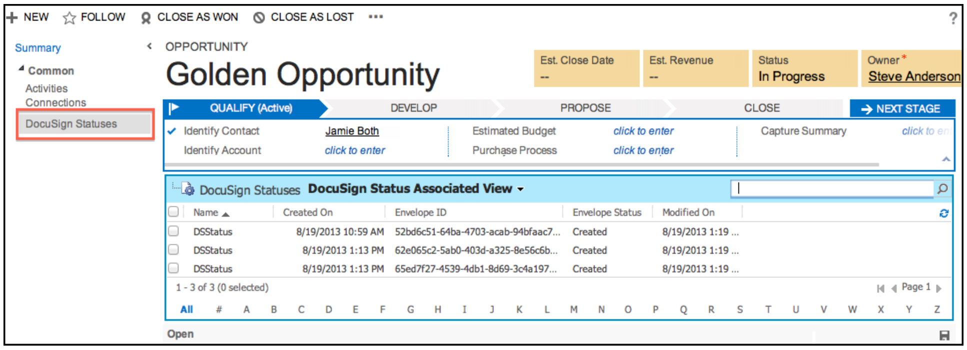
c. Click **Send** to send the document for signing.

The DocuSign overlay closes and the envelope is sent.

4. Done!

You have successfully sent documents attached to an object out for signature using DocuSign.

You can track the status of the envelope by clicking **DocuSign Statuses** under **Common** in the form for the entity from which the envelope was sent. When the envelope is completed, the signed documents are stored as a PDF attachment in the Notes section.



FAQ

What are "envelopes"?

- An envelope is an electronic container used to send one or more documents for signature with the DocuSign system. Envelopes can contain any number of pages or documents, and can be sent to multiple recipients.

How many envelopes can I send from a free account?

- A new DocuSign account can send 50 envelopes for all users in the account.

How will I know when my free account is running low on envelopes?

- The DocuSign system provides a warning when your free account is running low on envelopes.

I'm not the administrator for my Microsoft Dynamics CRM account; can I still install the DocuSign application?

- No, the current DocuSign application can only be installed by administrators.

I've installed the DocuSign application; can I configure the account without sending an envelope?

- You must start sending an envelope by clicking Send with DocuSign from any DocuSign enabled entity to configure your account. After you enter your DocuSign credentials or create a new free account and the new browser window with the DocuSign tagging page opens, click Discard Changes to cancel the envelope.

Do I have to give the other Microsoft Dynamics CRM account users my DocuSign credential information so they can send with DocuSign?

- No. If you created a new account, it is automatically set up to allow other users in your account to send with DocuSign. If you have a DocuSign account, enable the Account-Wide Rights and Send On Behalf Of Rights (API) features for your account. This allows the other users in your account to send with DocuSign.

If you have an existing DocuSign account and your account uses the Password Strength setting **Custom**, you must set the Password Questions Required option to **0**. You can check your Password Strength setting by going to your **Preferences**, clicking **Features** and, under the Manage Account heading, clicking **Password Strength**.

Not all of my Microsoft Dynamics CRM users have DocuSign accounts. Can they still use DocuSign for Microsoft Dynamics CRM?

- Yes, as long as you have seats available in your DocuSign account. When a Microsoft Dynamics user clicks **Send with DocuSign**, the system checks to see if that user exists in DocuSign (in this case, a user is defined as a unique username/email combination). There are two possible results:
    1. If the user does not exist as a member of the DocuSign account associated with the Dynamics CRM instance, DocuSign creates a new user with that user's username and email combination and adds that user as a member of the DocuSign account.
    2. If the user exists in the DocuSign system and exists as a member of the account associated with the Dynamics CRM instance, DocuSign uses that information to send the envelope.

I have an older version of DocuSign for Microsoft Dynamics CRM, how do I update to a newer version?

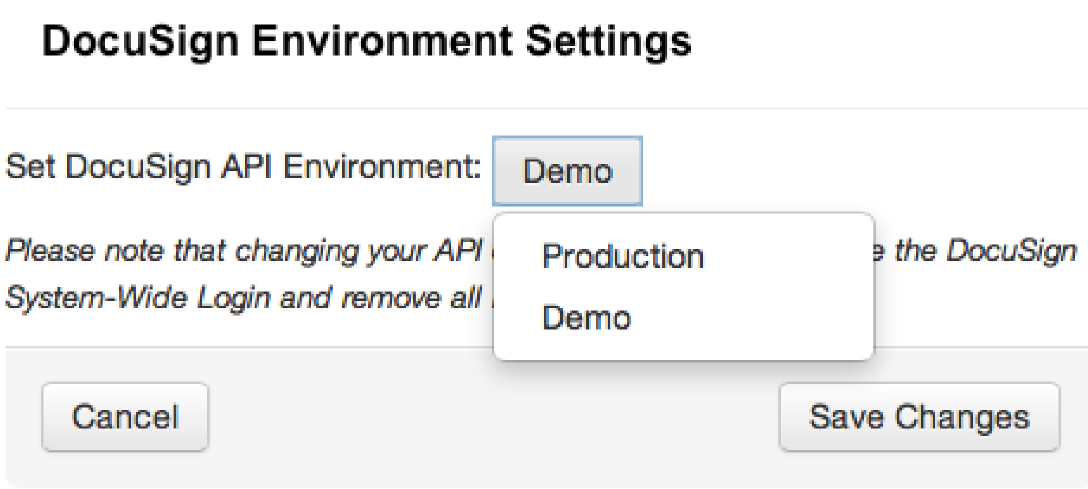
- Find and download the most recent solution from the DocuSign Solutions Showcase or Microsoft Pinpoint. Follow the instructions for importing the solution into Dynamics. During the installation, a message in the Solution Information dialog box states that the solution contains an update to an existing solution and shows the version numbers. Click **Next**. In the Import Options dialog, select to **Maintain customizations**, select **Activate any processes and enable any SDK message processing steps included in the solution**, and then click **Next**. The updated solution is installed.

> **Note**: All DocuSign status data and the system-wide login credentials are retained in Dynamics CRM when upgrading to the new version of the solution.

I am using a non-Production version of DocuSign. How can I test with Microsoft Dynamics CRM 2011?

- After installing the DocuSign for Microsoft Dynamics CRM 2011, in the Navigation Pane click **Settings > DocuSign > Configuration and Settings** (you must be logged into an account with Administrative rights).
- Click **DocuSign Environment Settings**. Toggle the **Set DocuSign API Environment** to **Demo** and click **Save Changes**. This allows you to connect your Microsoft Dynamics CRM with your

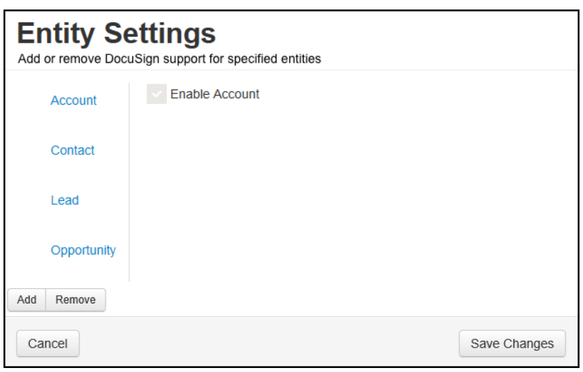
DocuSign Demo account.



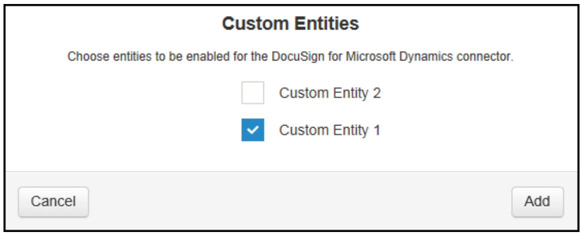
Note: As a system administrator, changing the API environment also removes the DocuSign system-wide login and removes all DocuSign status records.

How do I add the DocuSign send functionality to custom entities?

- After installing DocuSign for Microsoft Dynamics CRM 2011, a system administrator can add the **Send with DocuSign** button to a custom entity by enabling DocuSign support for that custom entity. To enable support for a custom entity, in the Navigation Pane click **Settings > DocuSign > Configuration and Settings**.
- Click **Entity Settings**.



- Click **Add** (below the list of enabled entities). A dialog box appears with all of the custom entities in your instance of Microsoft Dynamics CRM. Note: A custom entity must be **Published** to be shown on this screen.
- Select one or more custom entities and click **Add**.



The selected custom entities appear in the list of enabled entities. By default, the checkbox Enable custom entity name is checked. Click **Save Changes**.

The DocuSign button appears in the ribbon for the custom entity.

How do I remove the DocuSign send functionality from custom entities?

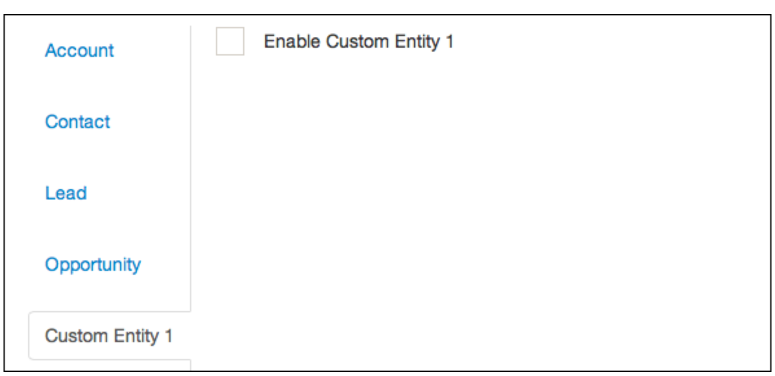
- A system administrator can remove DocuSign support from custom entities.

Important: This action will delete DocuSign Statuses associated with that entity.

- To remove support from a custom entity, in the Navigation Pane click **Settings > DocuSign > Configuration and Settings**.
- Click **Entity Settings**.
- Select the entity you would like to remove DocuSign support for on the list.
- Click **Remove** (below the list of enabled entities).

How do I disable the DocuSign send functionality from custom entities?

- A system administrator can remove the Send with DocuSign button from an entity without deleting the associated DocuSign Statuses by disabling DocuSign support from the custom entity.
- To disable support for a custom entity, in the Navigation Pane, click **Settings > DocuSign > Configuration and Settings**.
- Click **Entity Settings**.
- Clear the **Enable *custom entity name*** checkbox to disable DocuSign functionality for the associated custom entity. This action does not delete DocuSign Statuses associated with that entity, but removes the **Send with DocuSign** button from that entity.



My users are unable to create envelopes. Are there any settings I can change to correct this?

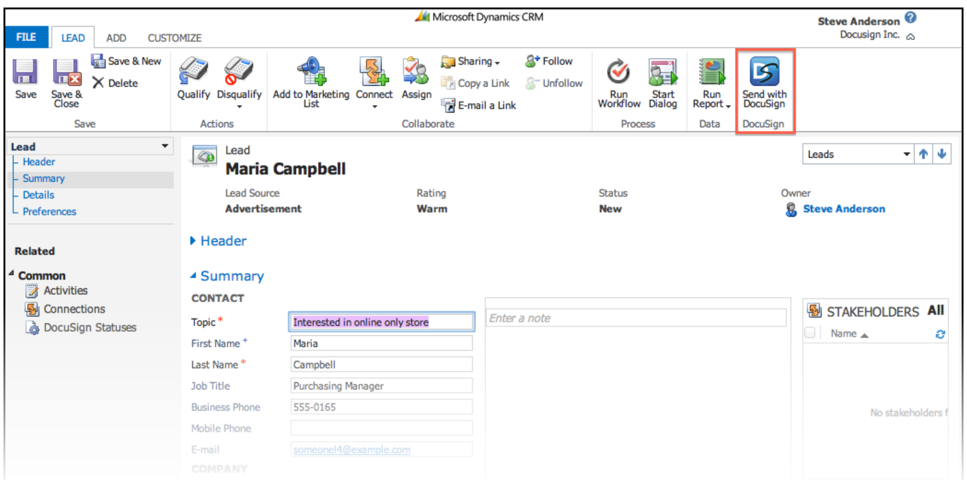
- Check your Dynamics settings, the group users must have "write access" enabled in IIS for the Dynamics site to create envelopes.

When I Send with DocuSign, which documents are sent from the Notes and Attachments?

- All of the documents from the Notes and Attachments of the selected entity are added to the envelope.

How do I use DocuSign with the Microsoft Dynamics CRM Outlook Connector?

- If you have the Microsoft Dynamics CRM 2011 plugin installed into your instance of Outlook, you can see the **Send with DocuSign** button in the ribbon for all entities that have been enabled to use DocuSign by your system administrator. When you click **Send with DocuSign**, a DocuSign envelope is created in the same way as it is in DocuSign for Microsoft Dynamics CRM 2011.



I have three documents in Notes and Attachments, but I only want to send two of them. How do I remove the other document?

- Click **Send with DocuSign**. In the new browser window, click Documents **Edit**, and then click the click the remove icon () for the document you don't want to send.

Are DocuSign statuses updated in Microsoft Dynamics CRM automatically?

- No – DocuSign Status records are updated when a user refreshes the entity record or the DocuSign Status record directly. The completed document(s) appears in the Notes section as a PDF when the selected entity record is refreshed.

I love this! How do I write a review in the Dynamics Pinpoint Marketplace?

- We are always happy to get comments. To add a review, go to our Microsoft Pinpoint Marketplace listing, and click **Write a Review**. Thanks!

How do I uninstall DocuSign for Microsoft Dynamics CRM 2011?

- Taking this action deletes the DocuSign for Microsoft Dynamics CRM 2011 solution from your Dynamics CRM instance as well as all DocuSign-related status data. To uninstall DocuSign for Microsoft Dynamics CRM 2011, in the Navigation Pane, click **Settings** and then under **Customizations**, click **Solutions**.

  Select the DocuSign solution and on the Action toolbar click **Delete**.

Release Notes (v2.0.x)

The following features were added for DocuSign for Microsoft Dynamics CRM 2011 - v2.0:

- **Send with DocuSign** functionality for the Account, Contact, and Lead entities.

  The status of the envelope is tracked as a DocuSign Status associated with the entity.

  Upon completion of the envelope, the signed document(s) and Certificate of Completion are attached as a PDF file to the entity.

- **Send with DocuSign** functionality for custom entities.

  Clicking **Send with DocuSign** adds documents from the Notes section into a draft envelope.

  The DocuSign tagger is opened so that the user can specify a recipient, tag, and send the envelope.

  The status of the envelope is tracked as a DocuSign Status associated with the entity.

  Upon completion of the envelope, the signed document(s) and Certificate of Completion are attached as a PDF file to the entity.

- Support for the MS Dynamics CRM Outlook plugin.

  If you have the Microsoft Dynamics CRM 2011 installed into your instance of Outlook, you see the Send with DocuSign button in the ribbon for all entities that have been enabled to use DocuSign by the system administrator. The behavior of the button is the same as it is in Dynamics CRM.

- Enhance the way trials and user creation works.

  If a system administrator signs up for a DocuSign from Dynamics CRM 2011 trial, a new trial account is created with 50 free envelopes.

  Once a system administrator sets up DocuSign for Dynamics CRM 2011, users of Dynamics CRM do not have to log in to DocuSign to use the Send with DocuSign functionality – the user account provisioning occurs in the background.

- Changes to the Configuration Settings interface.

  The new interface includes the ability for a system administrator to change environment configurations, remove the system-wide login, remove DocuSign status records from all entities, and configure DocuSign support for custom entities

The following bugs were fixed for DocuSign for Microsoft Dynamics CRM 2011 - v2.0:

- Added support for users with accounts on NA2 and EU1

The following bugs were fixed for DocuSign for Microsoft Dynamics CRM 2011 - v2.0.1:

- Rendering issues in Internet Explorer7, Internet Explorer9, and Internet Explorer10
- Error when adding DocuSign support for custom entities
- JavaScript errors and exceptions for on premise Microsoft Dynamics instances when attempting to configure DocuSign credentials
- The solution package was not correctly updating older versions of DocuSign for Microsoft Dynamics
- Added support through the Dynamics connector for NA2 and EU1 accounts
- Assigned the DocuSign User role to all Microsoft Dynamics users on install of the connector

The following bugs were fixed for DocuSign for Microsoft Dynamics CRM 2011 - v2.0.2:

- 'Input String' API issue when sending a document through DocuSign

For More Information or Assistance

For more information or assistance, visit DocuSign Support, the DocuSign Community, docusign.com, or contact DocuSign Support.

Note: This document was updated in August 2015 to correct the Versions Supported section.