Adobe Sign for Microsoft Dynamics

Installation & Configuration Guide (v6)
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Overview

Adobe Sign offers a plug-and-play integration solution with Microsoft Dynamics CRM. This integration provides the following benefits:

- Accelerates the quote-to-cash process by sending agreements—such as contracts and sales documents—from Dynamics with one click.
- Automatically merges data from Dynamics entities—such as accounts and contacts—into agreements and pushes data gathered from signers during the signing process back to Dynamics.
- Makes it easy for recipients to sign anywhere, anytime, on any device.
- Makes it possible to track documents sent out for signature from within Dynamics.
- Eliminates manual steps across the entire process.

This integration is available for Microsoft Dynamics CRM Online and CRM

- 2013 Service Pack 1, Update 4
- 2015 Update 2
- 2016
- Dynamics 365

Prerequisites

- Verify the correct userID (email address) is designated as an administrator in the Adobe Sign system
- Provide all the owned domains that your users could be using in their email addresses (Do not include public use domains like gmail.com, yahoo.com etc.)
- Obtain a list of all users in the Adobe Sign system using your owned domains
  - Once obtained, you may need to request valid users to be moved into your CRM linked Adobe Sign account
  - It is vital that the user email in Adobe Sign match the primary email of the CRM user. In the event where it is not, the Adobe Sign email value should be changed.

Within the Dynamics environment there are a couple of items to take note of:
• **Licensing** - Adobe Sign Users and Administrators need to be assigned with read/write CRM Cal Licensing.

• **File Limitations** – The file upload size limit is configurable in CRM (default value is 5Mb). Users get an error if they try to attach file larger than the configured value.
  
  o If the signed PDF is larger than the configured value, Dynamics prevents the file from attaching to the parent (or mapped) entity.

The auto-update process that updates the in-flight Agreements runs under the ownership of the administrator who installs the package. This administrator's email address must also be configured as an Adobe Sign Administrator for the auto-updates to succeed. (The API makes the “update” call authenticating as the installing Admin email address. If that email is not valid and active in Adobe Sign, the API call fails)

This limitation can be circumvented by assigning the ownership of the three auto-update processes to another user who is valid in the Adobe Sign system. The three processes that need to be re-assigned are:

  • RunPluginForUpdate
  • Trigger status update
  • Update status recursive
Obtaining the Package

The *Adobe Sign for MS Dynamics* package can be downloaded from the [Adobe Sign integrations page](#).

You will also be able to review release notes, known issues and additional install/user guide information on [Adobe Sign integrations page](#). If you have any questions or concerns about/during the installation process, please contact your Customer Success Manager.
Installing the Package

Installing the Microsoft Dynamics On-Premises package

Log in to your Dynamics CRM environment as an Administrator

- Navigate to **Settings > Solutions**

![Image of Settings > Solutions](image1)

The **All Solutions** page loads:

- Click the **Import** icon

![Image of All Solutions page](image2)

The **Select Solution Package** page loads:

- Browse to the Adobe Sign v6 binary that you downloaded
- Click **Next**

![Image of Select Solution Package](image3)
The Solution Information page loads:

- Click Next

The Import Options page loads:

- Ensure that the *Enable any SDK message processing steps*... option is checked
- Click Import

The Importing Solution page loads and imports the package.

This process may take a few minutes. Once the process is completed, you should receive a success message.

- Click Close
Installing the Microsoft Dynamics Online package

The online version of the package is installed from Microsoft's AppSource store:

• Login in to Dynamics as a Dynamics Administrator
• Navigate to: Settings > Security > Users

Select the user to which you want to grant access to install the package and then click on Promote to Admin
- Navigate to: **Settings > Solutions > Marketplace Option**

- Search for Adobe in the search box at the top right of the AppSource window
- Click the **Get it now** link
• Check the checkbox to give Microsoft permission to use or share account information and then click **Continue**
  
  o You will be redirected user to a new Terms and Privacy page

  ![One more thing...](image)

• On the Terms and Privacy page:
  
  o Select the correct Dynamics organization to apply Adobe Sign to (if you have more than one org)
  
  o Agree to Microsoft's Legal terms and Privacy Statement
  
  o Click the **Agree** button

• You are redirected to the status page, and installation starts automatically
  
  o You need to refresh the page to update the status

• **After the package is installed, it becomes visible in** **Solutions** **under** **Settings**.

**Note:** If a previous *Adobe Sign for Dynamics* package is already installed, then the package gets upgraded to the new version.

![Adobe Sign for Microsoft Dynamics 365](image)
Post Install Configuration (Required)
Install the Integration Key

New installations require an integration key to be generated in Adobe Sign and then entered into Dynamics. This key is the access token that authenticates the Adobe Sign and Dynamics environments to trust each other and share content.

To generate an Integration Key in Adobe Sign:

- Log in to your administrative user for your Adobe Sign account
- Navigate to Account > Adobe Sign API > API Information
- Click the Integration Key link in the middle of the page

**Note:** If you do not see the Integration Key link, contact your Success Manager or Adobe Sign Support to have them ensure you are in the correct channel.
The Create Integration Key interface loads:

Provide an intuitive name for your key (e.g. Dynamics CRM)

The Integration Key must have the following elements enabled:

- user_read
- user_write
- user_login
- agreement_read
- agreement_write
- agreement_send
- library_read
- library_write
Click **Save** once the key is configured.

The **Access Tokens** page is exposed showing the keys defined in your account.

- Click the key definition created for Dynamics CRM
  - The Integration Key link is exposed at the top of the definition.
- Click the **Integration Key** link

The Integration key is exposed:

- Copy this key and save in a secure place for the next step
- Click **OK**
To install the integration key into Dynamics CRM:

Log in to your administrative user for Dynamics CRM

- Navigate to: Adobe Sign > Global Settings

The Adobe Sign Global Settings page loads:

- Paste your key into the Integration Key field
- Click Validate Key in the ribbon

After a short delay, the page refreshes showing that "You are logged in with Adobe Sign" and displaying the integration key being used.
Verify Legacy Form Rendering is Disabled

It is necessary to disable legacy form rendering to use Adobe Sign. To do this:

- Navigate to: **Settings > Administration**

- Click **System Settings**

The **System Settings** page loads:

- Ensure that the **Use legacy form rendering** setting is set to **No**
- Click **OK**
Enable Activity Feeds on Adobe Agreement Entity

Enabling the activity feed for the adobe_agreement object permits Adobe Sign to update the events of the agreement under the Posts section on the Agreement record as well as the CRM records that were the parent object for the agreement (Contacts, Accounts, etc.).

- Navigate to: Settings > Activity Feeds Configuration

The Post Configurations page loads:

1. Click Refresh to ensure all configurations load

2. Single click the adobe_agreement record to select it, and then click Activate
The Confirm Post Configuration Activation pop-up is presented:

- Click **Activate**

![Confirm Post Configuration Activation](image)

The “You will need to publish...” notification pop-up presents:

- Click **OK**

![You will need to publish...](image)

You are returned to the **Post Configurations** page

- Click the ellipsis (…) to open the hidden options
- Click **Publish All Customizations**
Deploy Adobe Sign to Users by Assigning Security Roles

Every Dynamics user that is expected to use the Adobe Sign application needs to have their security role configured in the Dynamics environment.

The security roles are:

- **Adobe Sign Reader** – Allows the user read only access to Agreement records.
- **Adobe Sign User** - Allows the user to work with Agreements and other application entities. This role permits the user to see only their own records and allows User level access to built-in CRM records such as Contacts, Accounts, Leads, Opportunities, Orders, Invoices, Quotes.
- **Adobe Sign Administrator** – This role includes additional privileges in addition to the Adobe Sign User role such as adjusting Global Settings, Data Migration and allowing visibility over all Agreements throughout the application.

To configure the security roles:

- Navigate to: **Settings > Security**

The Security page opens:

- Select **Users**
The *Enabled Users* page loads:

- Select all of the users you want to promote to one type of security role
- Click **Manage Roles**

The *Manage User Roles* pop-up displays:

- Check the security role you want to define for these users
- Click **OK**
Reassign Workflow Ownership

The installation process creates three workflows and assigns the ownership of them to the installing user.

These three workflows execute in the context of the owning user, and if that owner is not assigned as an *Adobe Sign Administrator*, the workflows fail. Therefore, if the installing CRM admin has not added themselves as an *Adobe Sign Administrator*, the workflow ownership should be reassigned to a user that is.

**Note:** The user designated as the owner for the workflows must also have an *active* user in the Adobe Sign system. Ideally, this is the same user that has provided the Integration Key.

To change ownership of the workflows, navigate to: **Settings > Customizations > Customize the System > Processes > {Filter to show workflows}**

![Workflow Ownership Change](image)

There are three settings to update:

- RunPluginForUpdate
- Trigger status update
- Update status recursive
To reassign the ownership of these workflows:

1. Click the **Process Name** to open the **Information** panel for that workflow

2. Click the **Actions** drop-down menu, and select **Assign…**
   - The **Assign Process** panel opens.

3. Select the option to **Assign to another user**

4. Click the search icon at the bottom right to view your user list.

5. Select a user that is in the **Adobe Sign Administrator** group

6. Click **OK**
Optional Configurations

Adobe Sign Global Settings

The Adobe Sign Global Settings page permits environment-wide adjustments to how users are automatically provisioned in the Adobe Sign system, as well as how the completed agreements are presented within the Dynamics environment.

To access the settings:

- Navigate to: Adobe Sign > Global Settings

The Adobe Sign Global Settings page loads:

Under the Settings heading:

- **Enable user auto-provisioning** – If enabled, new users that are given access to the Adobe Sign entity automatically provision a user in the Adobe Sign system upon first use.
Provisioning is based on the users' primary email address, not the User Name, and takes place in the background without further action by the user or account administrator.

**Note:** New users that are automatically provisioned in Adobe Sign have a randomized password. Because the integration is working as an authenticated application via API, there is no functional problem within the Dynamics environment. However, if the user seeks to log in to Adobe Sign directly, they need to first reset their password via the "I forgot my password" link on the Adobe Sign home page.

- **Attach Signed Documents To Agreements** – This option pushes a PDF copy of the completed document back into Dynamics, attached to the agreement record (under the Notes section). This would be a copy of the authoritative original which is maintained on the Adobe Sign servers.

- **Attach Audit Trail To Agreements** – Enabling this causes the Adobe Sign audit trail PDF to be attached to the agreement record (under the Notes section) once the agreement is signed / completed. The audit trail explicitly enumerates the events (viewed, signed, delegated, etc.) of the agreement, the timeline of those events, as well as the IP address where the events were enacted.

- **Display Document Preview Images** – This option attaches an image of the signed / completed document to the record for easy viewing without having to download and open a PDF file. This image is installed at the very bottom of the agreement record.

---

**Removing / Revoking the Integration Key**

If you need to remove the current Integration Key from your Dynamics installation, you can do so on the *Adobe Sign Configuration* page under **Global Settings**. Removing the key severs the trust relationship between Dynamics CRM and Adobe Sign, stopping all new transactions as well as updates for existing transactions. Once the key is removed, it can be re-applied at any time to resume the interaction between the two systems.

To remove the key:

- Navigate to: Adobe Sign > Global Settings
- Click **Remove Key** in the ribbon
Removing the key is not the same as revoking the key. Revoking a key must be done in the Adobe Sign system, and makes that key permanently disabled for Adobe Sign use.

To revoke a key:

Log in to your administrative user for your Adobe Sign account

- Navigate to Account > Personal Preferences > Access Tokens

- Click the key definition for the Integration Key you want to revoke
  - This exposes the Revoke link
- Click Revoke
- Click Yes when challenged
Data Mapping

Data Mapping can significantly improve your agreement generation process, and ensure that documents have the appropriate content inserted into fields without the possibility of human error by pulling field values directly from Dynamics CRM.

Additionally, the mapping can push new content from completed agreements back into Dynamics, allowing valuable updates to your CRM without having to engage in manual data manipulation.

A Quick Note on Forms/Text Tags

Successful mapping requires that you have pre-built forms with defined field names so you can logically relate the Dynamics field to the Adobe Sign form field.

A simple form is illustrated below. The fields are defined by the curly bracket pairs on either side (defining the width of the field) and the field name (the string of characters between the curly brackets).

```
First: {{firstname}}
Last: {{lastname}}
Street: {{streetaddress}}
Apt: {{apt}}
City: {{city}}
State: {{state}}
Zip: {{zipcode}}
```

Text tags can include additional arguments beyond the name value, including validations, calculations and regular expressions. An in-depth understanding of form building can be found here, and can dramatically improve the quality of data you capture during the signature process.

**Tip:** The Text Tag Shortening feature can be very useful in form design and field mapping by establishing a convention for the field names that repeat on every document (and saves time by not having to re-create the formal tag). This expressly improves data mapping across multiple forms and builds an anchor for future forms.

It is also possible to build forms in PDF format.
Defining a Data Mapping

To configure Data Mapping:

- Navigate to: Adobe Sign > Data Mapping

This loads the Data Mappings page where all data maps are displayed:

- Click New
A New Data Mapping page loads:

This may take a moment; when the Entity field expands, the load is completed.

1. Enter an intuitive name for your data map
2. Identify this data mapping as the default mapping to be used for this entity (or not).
3. Select the CRM Entity from the drop-down.
   - This constrains the fields available for mapping to just the defined entity.
   - It is possible to have multiple data maps per Entity.
   - Once the entity value is set, it cannot be changed.

Once the Entity value is set, the mapping tools are exposed:

- Dynamics CRM Data --> Adobe Sign Template
- Adobe Sign Agreement --> Dynamics CRM Data
- Attachments
Relate the Dynamics CRM fields to the Adobe Sign field names

You can now start creating relationships between Dynamics CRM field names and the Adobe Sign form field names you have defined. Data mappings are configured based on how the data flows:

- **Dynamics CRM Data → Adobe Sign Template**: Prefills fields on your form using field values associated with the defined Dynamics Entity.
  - It is possible to create a “hunt group” of alternate CRM field values seeking to fill the Adobe Sign form field. Each member of the group will be tried in order until a non-null value is found and inserted. (See Below)

- **Adobe Sign Agreement → Dynamics CRM Data**: Populates the empty fields of the Dynamics Entity using form field values obtained through the signing process (once the agreement is completed).
  - By default, Adobe Sign will not push a new value into a CRM field that has content.
  - It is possible to define the relationship on the data map to override the content protection, and replace existing field values with new content from the signed form.

Regarding Data Types

Adobe Sign data mapping supports the following data types:

- **Text** – Text form fields are supported as Single Line of Text in CRM.

- **Boolean (Two Option)** – Check boxes are supported for CRM Boolean fields.
  - If dropdown or radio button form fields are used for Boolean Dynamics fields, the Dynamics → Adobe Sign mapping may fail. Adobe Sign → Dynamics mappings still work.

- **Option Set** – Dropdown lists and radio button form fields are supported for Dynamics Option Set fields

Relating fields (Dynamics to Adobe Sign):

- Select the Dynamics field from the **Attribute** drop-down
- Type the Adobe Sign form field name into the **Agreement field** input box
- (Optional) Check the **Add Reverse Direction Mapping** box if you want to also relate these fields mapping from Adobe Sign to Dynamics
• (Optional) Check the *Override* box if you want this mapping to ignore existing content in the Dynamics field and force-populate the field with the new content from the Adobe Sign field.

• Click *Add*

The new field relation will process for a few seconds, and then you will see the relationship populate below the configuration settings.

If you opted to add the reverse direction, you will see the new relationship populate under the *Adobe to CRM* configuration fields also.

If you opted to *Override* the content protection, you will see that indicated on the relationship record

*Relating fields (Adobe to CRM):*

The process for discretely creating mapping from Adobe to Dynamics is the same as above except there is no option to *Add Reverse Direction Mapping.*
Deleting mapped relationships
You can delete any mapped relationship by hovering your mouse over the relationship record and clicking the **Delete** icon on the far right.

Alternate field mapping relationships (Hunt Group)
If you define a field on an Adobe Sign form that might be filled by one of several CRM fields, then you can create an ordered list (hunt group) of CRM attributes that will seek to populate the Adobe Sign field.

For example, you may have the CRM field *First Name* mapped to a form field named *firstname*, and then also map the CRM field *Yomi First Name* to that same form field name. The application will first attempt to fill the field with content in the *First Name* field, and if no content is found, Adobe will attempt to use content in the *Yomi First Name* field. If no content is found in any element of the hunt group, the field is left empty.

To define the hunt group:

- Create a Dynamics to Adobe relationship between your primary Dynamics attribute and the Adobe form field name.
- Once the first record is in place, change the Dynamics attribute to the secondary Dynamics attribute, and add that relationship.
- Click **OK** when asked if you want to make the alternate mapping.

After the record is updated in the system, you will see that the records have changed to include a prefix in front of the Entity Attribute:

- # will be in front of the primary/default attribute. This field will always be the first field checked for content.
Subsequent relations will be numbered 1-N. The first alternate field relationship is indicated by (1) and will always be the first alternate field checked. (2) would be the second alternate field, and so on.
Adding attachments to related Entities

Once an agreement is fully signed and executed, Adobe Sign will produce a PDF copy of the document and an audit trail of the signing process. It is possible to have these documents attached as PDF files to any other CRM Entity that is related to the data mapping's parent Entity.

In the Attachments section of the data mapping page, you will find two Document Types available via drop-down:

- **Signed PDF** – The full text of the signed document. This is a copy of the authoritative original that is maintained on the Adobe Sign servers.
- **Audit Trail** – A full enumeration of all major events (signing, delegation, etc.) and the associated metadata (time/date, IP address, etc.)

You can attach one or both files to any related Entity, but you must explicitly map them individually.

To map an attachment:

- Select the *Document Type* you want from the drop-down
- Select the Entity you want to push the document to using the *Attach to CRM Record* drop-down list.
  - Only Entities with a defined relationship to the parent Entity will be listed
- Click *Add*

Attachment relationships will be listed under the configuration settings.
Deleting an Attachment

To delete a record, mouse over the record and click the **Delete** icon on the far right.

```
Attachments

<table>
<thead>
<tr>
<th>Target Entity</th>
<th>Document Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modified By (User)</td>
<td>Signed PDF</td>
</tr>
</tbody>
</table>

Add

Attach To CRM Record

Modified By (User)
Agreement Templates

As an Adobe Sign Admin in the Dynamics environment, you have the authority to create agreement templates that can pre-configure a majority of the agreement fields, attach files, and tie that agreement to relevant data mapping.

Templates are tied to a Dynamics entity, and become available for agreements sent from that entity when they are flagged as Active.

Note: Data Maps are at the core of Agreement Templates, and should be defined before the Agreement Template is configured.

To configure your Agreement Template:

- Navigate to: Adobe Sign > Agreement Templates
The Agreement Template is divided into five sections, each containing editable values that you can configure if you have a predictable use pattern:

The header section:
At the very top of the page, you will see the identifying information of the template.

- The name of the template is expressed in large font at the very top
- Active – This check box dictates if the template is available for users to select when sending from the primary entity
- Primary Entity – Templates are tied to a single entity within Dynamics. The declared entity is the only entity that will display this template
  - This value is locked once the agreement is created
- Name – The name of the template. This is identical to the name expressed at the top of the page
- Data Mapping – This field indicates the name of the Data Map that is bound to the template.

The Recipients section:
The Recipients section contains any recipient relationships that you want to pre-configure to the template, as well as the overall signature workflow (sequential or parallel).
• **Recipients** – You can hard code a recipient list within a template by clicking the plus icon on the far right of the window. A pop-down opens exposing the configuration options.
  
  o By default, the recipient list is left empty for the Sender to manually populate.
  
  o Adding a default recipient must be done explicitly by clicking the plus, and then saving the default values presented with *Create from primary entity* enabled.

  ![Recipient Configuration](image1)

  o The Override Default Verification option allows you to escape the default verification method (set in the Security section), and apply a different verification method for just this recipient.

  ![Recipient Override Verification](image2)

  o Adding additional recipients (e.g. and internal counter-signature process), or recipients that aren’t involved in the signature process, only requires that you uncheck the *Create from primary entity* box, and then define the recipient. An excellent option for CCing teams that only need to manage the final documents.

  ![Recipient Additional](image3)
- **In-person signing** – If you need to have the signer sign on the sender's local system or tablet without involving email, senders can host the signature using this option
- **Signing Order** – Choose between two workflows for getting your document signed
  - **Any Order** notifies all signers at one time and allows them to sign without waiting on anyone else
  - **Order Entered** enforces a strict sequential signature process based on the order you define the signers on the agreement
- **I have to sign** – When checked, the sender is automatically added to the signature process.
- **Sender Signing Order** – When you add yourself to the signature process you are presented with three options:
  - **I sign first** - This option inserts the sender as the first recipient of the transaction
  - **I sign last** – This option places the sender at the end of the signature cycle
  - **Only I sign** – Useful when only the Sender is applying their signature

### The Agreement Details section:
The Agreement Details section governs the properties of the individual transaction. What it's called, how it's signed, if it expires, and what happens after a signature is applied

#### *Agreement Details*

- **Agreement Name** – The Agreement Name is prominent in the notification process, surfacing in the email subject line, in bold font in the email body, and in smaller font throughout the boilerplate description (seen in yellow highlight below)
- **Message** – The Message field is an open plain text field where you can insert any message or instructions to the signer (seen in green highlight below)

**Note:** Both the *Agreement Name* and *Message* fields permit the insertion of Dynamics field values, to improve personalization for the recipient. To open a list of possible values, type a left brace: {

---

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• **Signing Language** – This setting defines the language used when the agreement is sent to the signer. All email and on-screen prompts/instructions for the signer are in the language chosen.

**Agreement Options:**

• **One-click send** – When enabled, the template automatically sends the agreement when the template is selected.
  For example: You have an NDA template designed with Contact as the primary entity, and the recipients section is configured to import the Contact’s email. The Sender only needs to select the NDA template from the Contact they intend to send it to. The configuration phase is skipped, and the agreement is sent without further interaction.
  o If no recipient is configured, *One-click* is ignored, and the agreement opens for manual configuration.

• **Signature Type** – Choose the format in which you want the document signed
  o *ESIGN* routes your agreements to be signed electronically using email and expects the recipients to sign electronically
  o *WRITTEN* delivers your documents via email, prompting the signer to print the document and physically sign it. Then they must upload the document back to Adobe Sign system using the same email link.

• **Always preview documents before sending** – When checked, the agreement automatically opens the authoring environment so the sender can place form fields

• **Agreement expires** – If checked, the agreement defines a termination date when the agreement expires

• **Days until agreement expires** – This defines the number of days the agreement remains signable when the *Agreement expires* feature is enabled

• **Schedule recipient reminders** - Defines a reminder cycle for the transaction. Reminders can be configured to be sent to the current recipient on a daily or weekly cycle

• **Add post-signing landing page** – When enabled, you can dictate what URL the recipient is routed to after they complete their interaction with the agreement

• **Post-signing landing page** – This field contains the URL for the page you want to direct recipients to when *Add post-signing landing page* is enabled

• **Delay in seconds for redirect** – Required when a *Post-signing landing page* is defined, this setting dictates how much delay should be observed after the signature is applied, and before the recipient is re-directed to the designated landing page.
The **Security** section
This section only defines the default verification method for the recipients, and the optional password for the final PDF document

- **Security**

  ![Security](image)

  - **Identity Verification** - Defines the second factor verification to authenticate the recipient
    - **Email** – No second factor verification is applied
    - **Password** – Standard alphanumeric password field. When used, the sender must communicate the password to the signer out of band
    - **Knowledge based** – Knowledge based authentication uses public databases to ask the signer several questions about their past to verify their identity
    - **Web Identity** - Social media is used to apply a second authentication
  - **Password Protect signed document** – Enable this if you would like to apply a password to the final document to prevent un-authenticated access

The **Files** section
This section allows you to pre-attach a file for the agreement. For example, if you create a template for an NDA, then you can attach the company NDA file directly in the template so the sender doesn't have to.
Adding Custom CRM Entities to Adobe Sign

Several built-in CRM entities are included in the Adobe Sign package that you can relate your agreements to:

- Contacts
- Accounts
- Leads
- Opportunities
- Quotes
- Invoices
- Orders
- Contracts

You can add your custom CRM entity (or any other built-in CRM entity) to this scope, by following a few steps.

For our example, let’s assume there is a custom CRM entity called “Customer”.

- Navigate to Settings > Customization
The *Customization* page loads:

- Click the **Customize the System** option

![Microsoft Dynamics CRM Interface](image)

The *Default Solution* page opens in a separate window:

In the left side rail under **Components**

- Expand the **Entities** list
- Find the custom entity ("Customer" in this case) and expand it
- Single click the name of the Entity to display the fields and controls
- **Copy** the value from the *Name* field (in this example the value is "new_customer").
  - This is the internal system name of your custom Entity.
• Navigate to the 1:N Relationships option, under your custom Entity
  o Click the New 1-to-Many Relationship button.

A new Relationship window opens.

Create the new relationship:

1. Choose Agreement from the Related Entity field
   • The Name field changes to show {entityName}_adobe_agreement

2. Paste the name of your custom entity (“new_customer” in our example) into the Display Name field.
• The Name field changes its value to be "new_" + {entityName} + "Id". (new_new_customerID)

3. Click Save and Close

The Relationship window closes

• Click Publish All Customizations at the top of the 1:N Relationships page
Performance Monitoring

Administrators can monitor the performance of the integration between the Dynamics application and Adobe Sign API.

- Navigate to: Adobe Sign > Performance

The *Active Transaction Performances* page loads, providing the average duration (in seconds) that each API call to Adobe Sign takes to complete. The data is averaged over the previous 240 hours (~10 days).

To produce this information in a bar graph:

- Click *Charts* (far right rail)
The bar graphs can each be drilled down into to see discrete API call instances and the time they were called.