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Overview

The upgrade process for the Adobe Sign integration into Microsoft Dynamics CRM from any previous version is to completely install the new package alongside the existing package, and migrate the data to the new package.

**DO NOT uninstall the existing package.**

Once the new package is fully installed, configured and migrated, Admins should thoroughly audit their agreements to ensure that the migration is completed as expected.

This integration is available for Microsoft Dynamics CRM Online and CRM

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

Objects that are eligible for migration

- Recipient
- Documents
- Agreements – All agreements that are present in the legacy application, along with any recipients and documents related to them, will be migrated to Adobe Sign application.
- User Settings – User settings for each existing legacy application user will be migrated to the Adobe Sign application. Data that will be migrated is Agreement Name and Agreement Message. This data will be added to each user’s Agreement Template in Adobe Sign application.

Prerequisites

Before downloading the package, [contact the Adobe Sign support team](#) to:

- Ensure the Adobe Sign account is properly provisioned in the MS Dynamics channel
- Verify the correct userID (email address) is designated as an administrator in the Adobe Sign system.
- Verify which userID (in Adobe Sign) the legacy package is linked to (Which userID holds the legacy integration key). **DO NOT** disable the legacy security role for this user.
• Provide all of 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
  o Once obtained, you may need to request valid users to be moved into your CRM linked Adobe Sign account
  o It is vital that the user email in Adobe Sign match the primary email of the CRM user. In the event where it does not, the Adobe Sign email value should be changed.

Before attempting the data migration:
• Ensure parity between the two packages so the migration effort can build the correct relationships between entities/records:
  o Ensure the new Adobe Sign package is fully installed and configured
  o Ensure that every user that has a security role for the legacy package has a corresponding role for the Adobe Sign package.
  o Define any Custom CRM Entities to have equivalent relationships for the Adobe Sign package as exist in the legacy package.

After completing the data migration:
• It is recommended that you leave the old package in place
• Once the new Adobe Sign package is deployed to users, you can remove the security roles for the legacy package
  o DO NOT disable the legacy security role for the user that holds the legacy integration key. This user/key is vital for any pending transactions using the legacy package.
  o This will remove the menu items for the legacy package from the user interface, preventing new transactions on the legacy application.
• You can re-run the migration process at any time.
  o Some number of legacy transactions will continue to return after the migration is completed.
Obtaining the Package

Download the Package from the App Store

Navigate to http://www.crm-appstore.com/

- In the Search field, type **Adobe Sign**
- Click on the **Adobe Sign** icon
- When the Adobe Sign page loads, click the **Try** button

The installation (.zip) file downloads to your system.
Installing the Package

Log in to your Dynamics CRM environment as an Administrator

- Navigate to Main > Settings > Solutions

The All Solutions page loads:

  - Click the Import icon

The Select Solution Package page loads:

- Browse to the Adobe Sign v5 binary that you downloaded from the app store
- Click Next
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
Post Install Configuration (Required)

Verify the Integration Key

Existing installations will already have an integration key entered into Dynamics. This key is the access token that authenticates the Adobe Sign and Dynamics environments to trust each other and share content.

Check to see if there is an integration key in place:

- Navigate to **Main > Adobe Sign > Global Settings**

If you see an integration key and the message “You are logged in with Adobe Sign”, then you can skip this step and go to verifying that the Legacy Form Rendering is disabled. **DO NOT** install a new key if one already exists.

If no there is no pre-existing key:

You will first need to generate an Integration Key in Adobe Sign:

- Log into your administrative user for your Adobe Sign account
- Navigate to **Account > Personal Preferences > Access Tokens**
- Click the circled plus icon on the right side of the window
The *Create Integration Key* interface will load:

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

The Integration Key must have at least 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 will be exposed at the top of the definition.
- Click the Integration Key link

The Integration key is exposed:

- Copy this key and save in 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 **Main > Adobe Sign > Global Settings**

The *Adobe Sign Configuration* page loads:

- Paste your key into the **Integration Key** field
- Click **Validate Key**

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 **Main > Settings > Administration**

![Microsoft Dynamics CRM Settings](image1)

- Click on **System Settings**

![System Settings](image2)

The **System Settings** page loads:

- Ensure that the **Use legacy form rendering** setting is set to **No**
- Click **OK**

![System Settings](image3)
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 **Main > 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

The "You will need to publish..." notification will pop-up

- Click OK

You will be 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

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 Main > Settings > Security

This opens the Security page
• Select Users

The Enabled Users page will load

• Select all of the users you want to promote to one type of security role

• Click Manage Roles
The *Manage User Roles* pop-up will display

- Check the security role you want to define for these users
- Click **OK**
Optional Configurations

Adobe Sign Global Settings

The Adobe Sign Global Settings page will permit 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 **Main > Adobe Sign > Global Settings**

The **Adobe Sign Configuration** page loads:

The settings available are:

- **Enable user auto-provisioning** – If enabled, new users that are given access to the Adobe Sign entity will automatic 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 will 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 into Adobe Sign directly, they will 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 will push 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 will cause 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 On Signed Agreements** – This option will attach 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.

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**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 **Main > Settings > Customization**

The *Customization* page will load

- Click the **Customize the System** option
The Default Solution page will open 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
• Click on the **New 1-to-Many Relationship** button.

A new **Relationship** window will open

Create the new relationship:

1. Chose **Agreement** from the Related Entity field
   - The Name field will change 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 will change its value to be "new_" + {entityName} + "Id".

(new_new_customerID)

3. Click **Save and Close**
   - Click **Publish All Customizations** at the top of the *1:N Relationships* page

Now you should be able to choose "Send For Signature" from your custom entity.
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 will sever 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 Main > Adobe Sign > Global Settings
- Click Remove Key

Removing the key is not the same as revoking the key. Revoking a key must be done in the Adobe Sign system, and will make that key permanently disabled for Adobe Sign use.
To revoke a key:

Log into 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 will expose 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 in 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 CRM field to the Adobe Sign form field.

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

```
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 (pg. 26-27 of the text tag guide) 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.
Defining a Data Mapping Template

To configure Data Mapping:

- Navigate to **Main > Adobe Sign > Data Mapping**

This will load the *Active Agreement Mapping Templates* page.

- Click **New**
A new *Data Mapping* page will load.

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

- 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 templates per Entity.
- Enter an intuitive name for your template.
  - The name cannot be changed once defined.
- Identify this template as the default template to be used for this entity (or not).
Relate the CRM fields to the Adobe Sign field names

You can now start creating relationships between CRM field names and the Adobe Sign form field names you have defined. Just under the option to set the template as a default, you will see two sections which define the direction the data mappings will populate:

- **CRM to Adobe** will attempt to prefill fields on your form using field values associated with the defined 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 to CRM** will attempt to populate the empty fields of the CRM 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 template to override the content protection, and replace existing field values with new content from the signed form.

Relating fields (CRM to Adobe):

- Select the CRM 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 CRM
- (Optional) Check the Override box if you want this template to ignore existing content in the CRM 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 CRM 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 CRM to Adobe relationship between your primary CRM attribute and the Adobe form field name.
- Once the first record is in place, change the CRM attribute to the secondary CRM 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 template’s parent Entity.

In the Attachments section of the template 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.
Performance Monitoring

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

- Navigate to **Main > Adobe Sign > Performance**

The *Active Transaction Performances* page will load 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 on **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.
Migrating Data from the Legacy Package

Migrating the data from the legacy package to the new Adobe Sign package is as simple as a button click, assuming the new package is fully installed and configured to match the legacy package.

The key elements to review before attempting the data migration:

- Ensure parity between the two packages so the migration effort can build the correct relationships between entities/records:
  - Ensure the new Adobe Sign package is fully installed and configured
  - Ensure that every user that has a security role for the legacy package has a corresponding role for the Adobe Sign package.
  - Define any Custom CRM Entities to have equivalent relationships for the Adobe Sign package as exist in the legacy package.

When you are comfortable there is parity between the two packages:

- Navigate to Main > Adobe Sign > Global Settings
The Adobe Sign Configuration page will load

- Click the **Data Migration** tab
- Click the **Start Migration** button
- Wait…..

The installation will take some time depending on the amount of content to migrate.