

Docusign Configuration

- 2024-03-27 - Comments (0) - D365 FO Connector General Information

Lasernet for Dynamics 365

Lasernet is able to generate a PDF file that can be sent to a customer's Docusign portal for authorisation. The basic principle is that you define in Dynamics who should authorise the document which is to be sent as a Jobinfo to Lasernet which in turn sends the email address and the PDF file to the Docusign portal for processing.

A customer needs to have a Docusign account (this is not provided by Formpipe).

Steps

The following steps can be taken to ensure a PDF file is sent to a customer's Docusign portal for authorisation:

1. A Dynamics developer is needed to create a form where we can setup default employees on a vendor or customer or wherever you need it.

Here is a sample where we have added **Vendor Mapping** to the Vendor. On the vendor, you create a "default" setup of employees which can subsequently be retrieved from the Purchase order / "Employee mapping".

https://tstmw73pu15fca92800d5126bfaos.cloudax.dynamics.com/?cmp=USMF&mi=VendTableListPage

Dynamics 365 Finance and Operations Accounts payable > Vendors > All vendors

Vendor Mapping

MAINTAIN COPY SET UP

On hold Add vendor to another legal entity Contacts Bank accounts Vendor state tax IDs Summary update Certifications Purchase orders with retention Product filters TRANSACTIONS Transactions Invoices Balance TAX INFORMATION Update 1099 Vendor settlement for 1099s RELATED Vendor Vendor

Click the edit button to make changes.

ALL VENDORS

Filter

Vendor account	Name	Vendor hold	Phone	Extension	Primary contact
1001	Acme Office Supplies	No	773-998-8892		
1002	Lande Packaging Supplies	No			
1003	Ade Supply Company	No			
104	Best Supplier - Europe	No			
AirCarrier	Air Cargo Carrier	No			
CN-001	Contoso Asia	No	80123) 4567 8901		
CompanyCC	CompanyCC	No			
JP-001	Contoso Chemicals Japan	No			
JULIAF	Julia Funderburk	No	425-555-5053	5053	
LTL Vendor	LTL Vendor	No			
ONE	One-time vendor	No			

2. On the Purchase order form, add another form called *Employee Mapping*. Here you can view the default settings that you type in on the vendor form and override them if needed. We need an email address for all that need to sign the document.

https://tstmw73pu15fca92800d5126bfaos.cloudax.dynamics.com/?cmp=USMF&mi=PurchTableListPage

Dynamics 365 Finance and Operations Accounts payable > Purchase orders > All purchase orders

Employee Mapping

NEW MAINTAIN COPY VIEW

From a sales order Request change Cancel From all Totals Warehouse label (all records) Warehouse label (Selected records) From journal

Click the edit button to make changes.

ALL PURCHASE ORDERS

Filter

Purchase order	Vendor account	Invoice account	Vendor name	Purchase type	Approval status
000017	US-104	US-104	Fabrikam Supplier	Purchase order	Confirmed
000018	US-105	US-105	Datum Receivers	Purchase order	Confirmed
000019	US-103	US-103	Rain Projectors	Purchase order	Confirmed
000020	CN-001	CN-001	Contoso Asia	Purchase order	Approved
000021	CN-001	CN-001	Contoso Asia	Purchase order	Approved
000023	US-104	US-104	Fabrikam Supplier	Purchase order	Confirmed
000026	US-104	US-104	Fabrikam Supplier	Purchase order	Confirmed
000027	US-101	US-101	Fabrikam Electronics	Purchase order	Confirmed

Employee Mapping ?

Purchase order

000039

Load default

+ Add line Remove

✓	Personnel number	Email
	000001	jodi@contoso.com

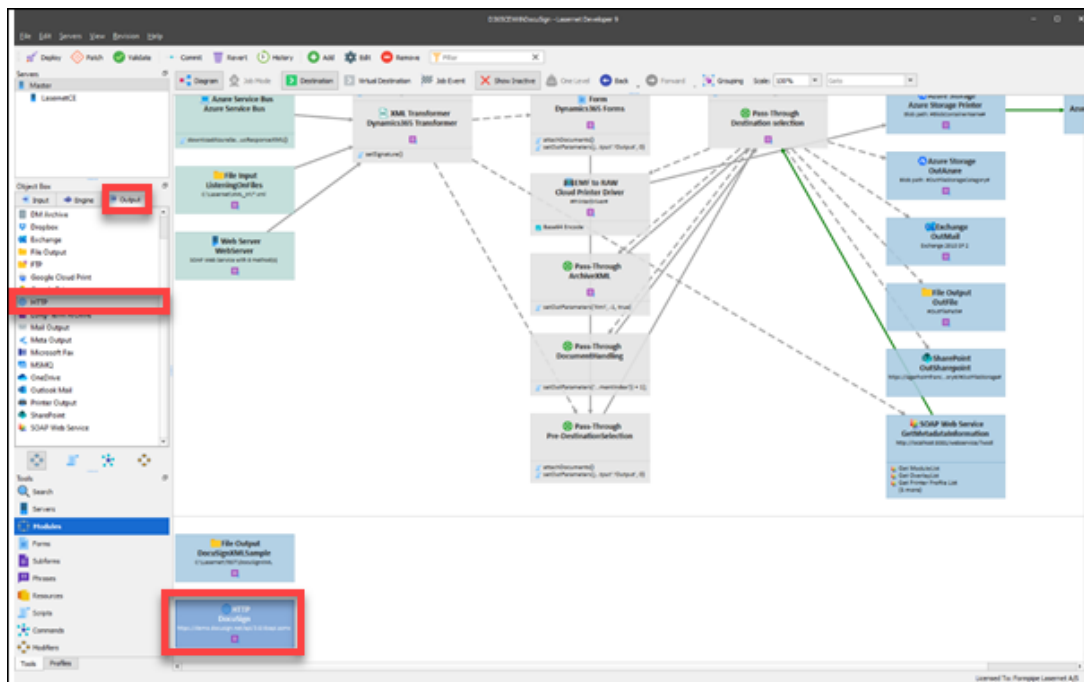
Changing an email address under "Employee Mapping" does not change the employee's email address.

3. Now that you have a form where you can see the email addresses, add those into the XML file that is sent to Lasernet. Do this via the **Query wizard** or **Structure** in Lascript.

Lascript configuration

There are some changes to the Lascript build that are needed.

1. Add a new Output module by adding an **HTTP** module:

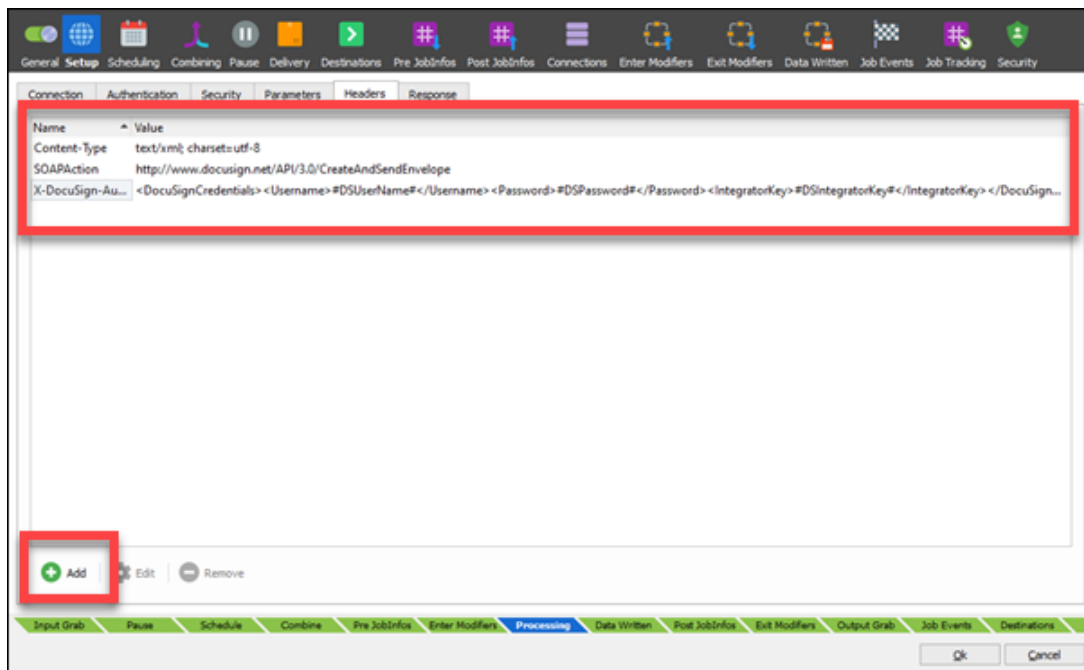


2. Fill in the information on the **Setup / Connection** tab.

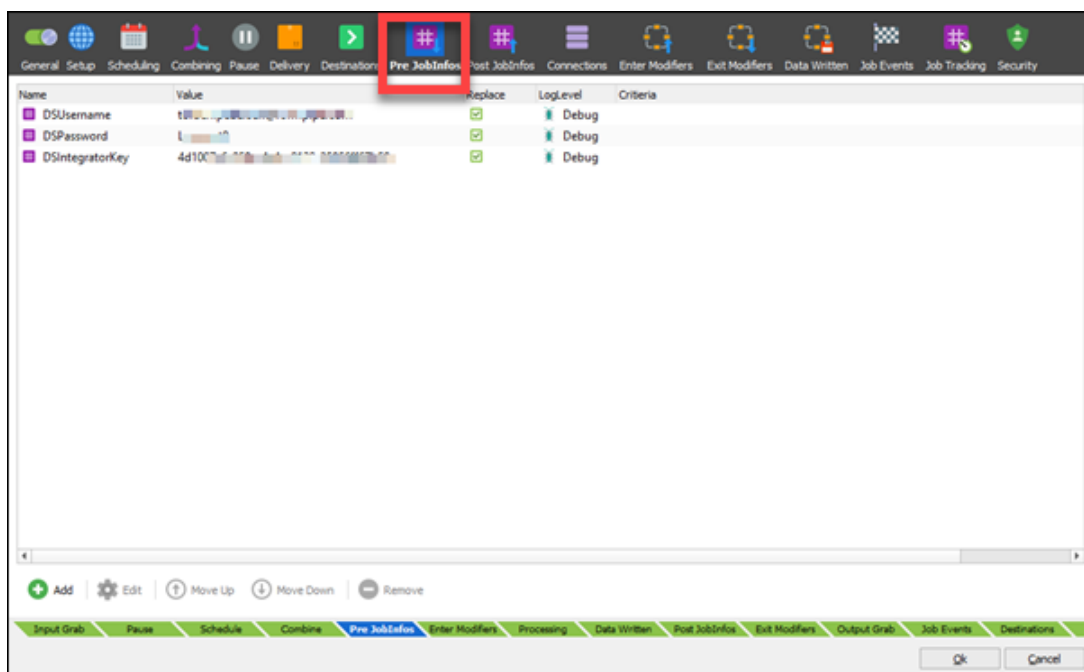
3. Select the **Headers** tab and add the following using the **Add** button:

- Content-Type text/xml; charset=utf-8
- SOAPAction <http://www.docusign.net/API/3.0/CreateAndSendEnvelope>
- X-DocuSign-Authentication

```
<DocuSignCredentials><Username>#DSUserName#</Username><Password>#DS
Password#</Password><IntegratorKey>#DSIntegratorKey#</IntegratorKey></Doc
uSignCredentials>
```

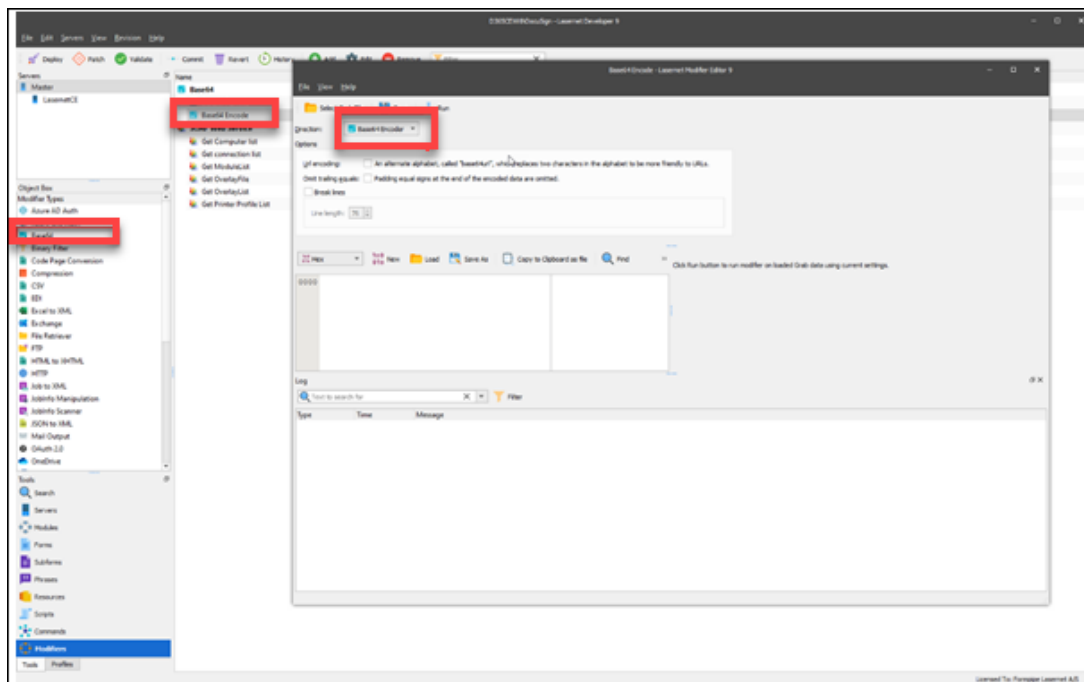


The username and password can be hardcoded in **Pre JobInfos** if you do not get that from the datastream.



Now we have a module with a connection to Docusign. The next step is the add a new Base 64 Encode modifier if you do not already have one.

4. Go to **Modifiers** and add a **Base64** modifier. Name it **Base64 Encode** and make sure that you have selected **Base64 Encoder** in **Direction**.



Change your Lasernet Form

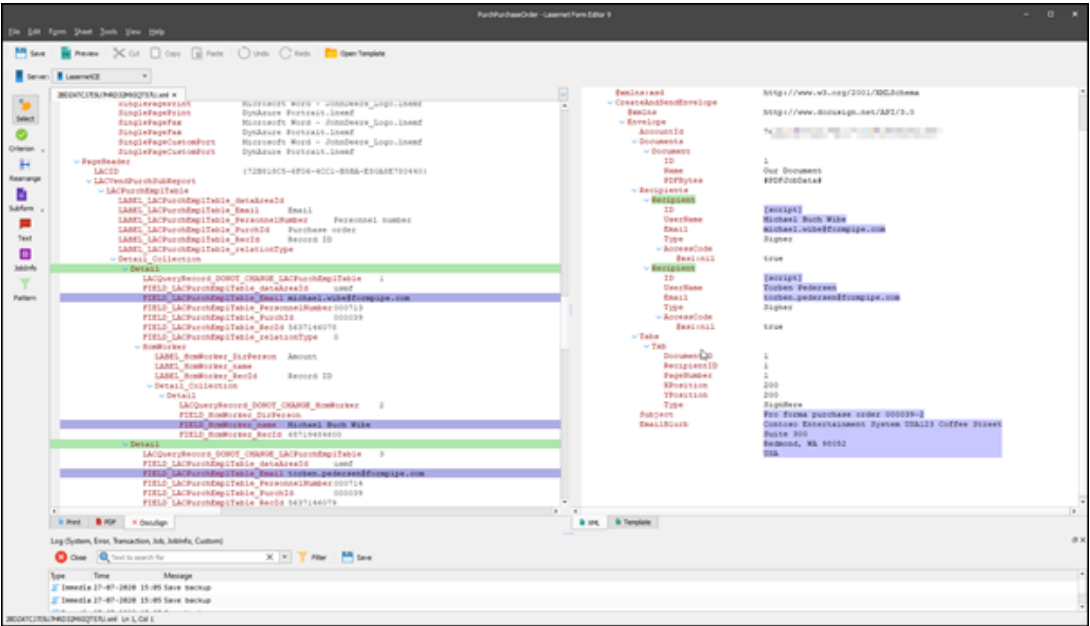
1. Navigate to your form on the report on which you need to sign with DocuSign. In this example, we are using the Purchase order form.
2. Add a new sheet after the PDF sheet with **XML** as input and output and ensure you add Sheet criteria so only this sheet is executed when needed.
3. You need to import this template. You might have to create an XML file manually and insert this text:

CODE

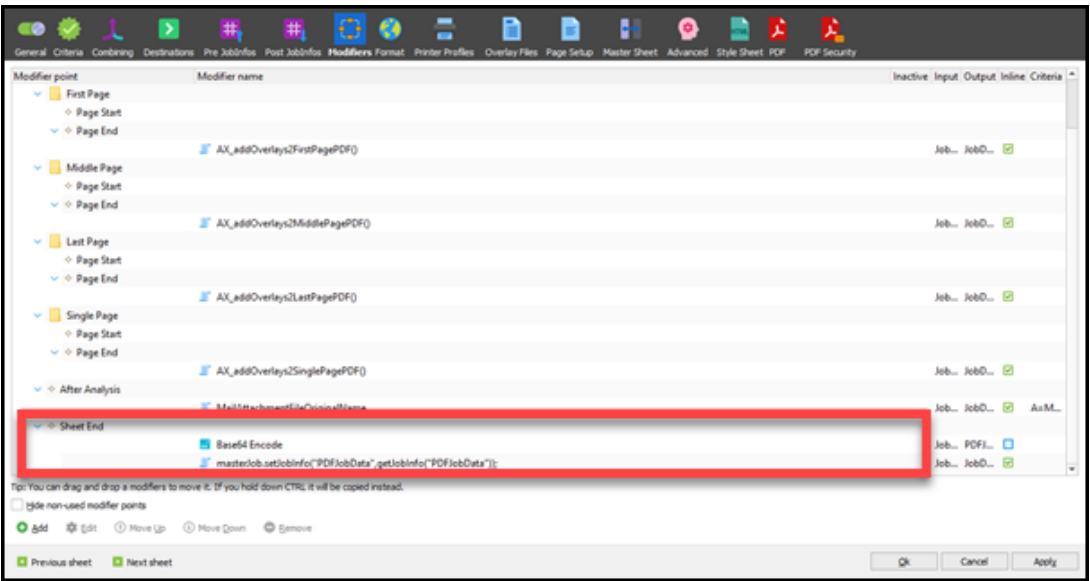
```
<?xml version='1.0'?>
<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
<s:Body xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
<CreateAndSendEnvelope xmlns="http://www.docusign.net/API/3.0">
<Envelope>
<AccountId>76dc1c5b-6fdc-425b-b50d-be89e38dc696</AccountId>
<Documents>
<Document>
<ID>1</ID>
<Name>Our Document</Name>
<PDFBytes>#PDFJobData#</PDFBytes>
</Document>
</Documents>
<Recipients>
```

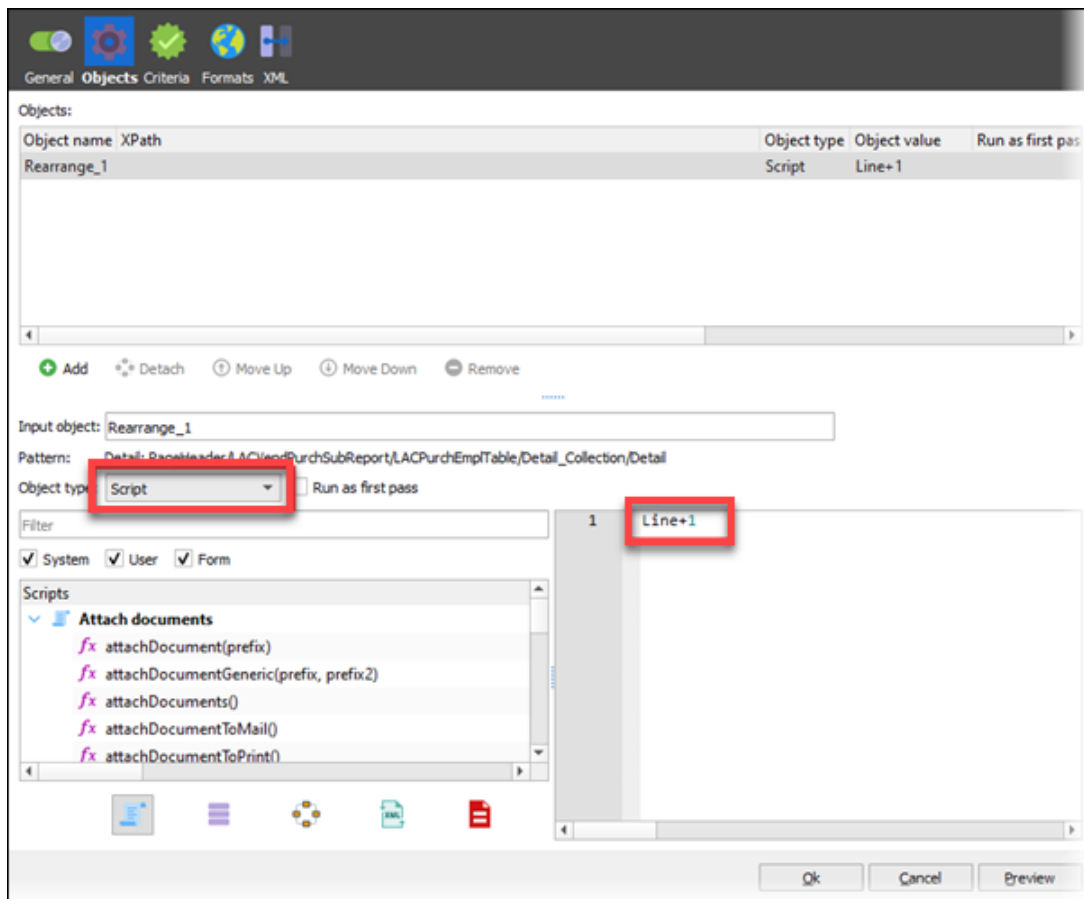
[illegible]

persons that need to sign the document.

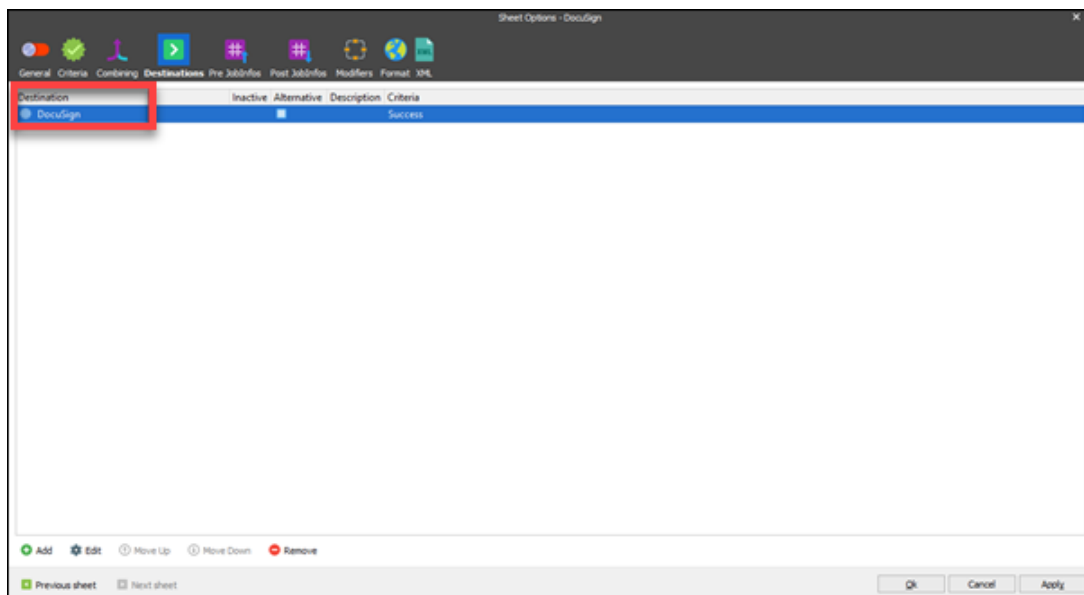


5. Switch to your **PDF sheet**, open up **Sheet Options**. select **Modifiers** and add these two to the **Sheet End**:





8. Ensure that the DocuSign sheet is going to the right destination:



9. **Save** the Form and ensure that you update the Lasernet server.

You should now be able to send the PDF to DocuSign and get your document signed.

