Pen control in Dynamics 365

With everyone attempting to move to a more 'paperless' office, Microsoft have introduced a way of capturing a digital signature and displaying it within Dynamics 365. The Pen control can easily be added to a form that can be captured and displayed on a laptop, phone or tablet.

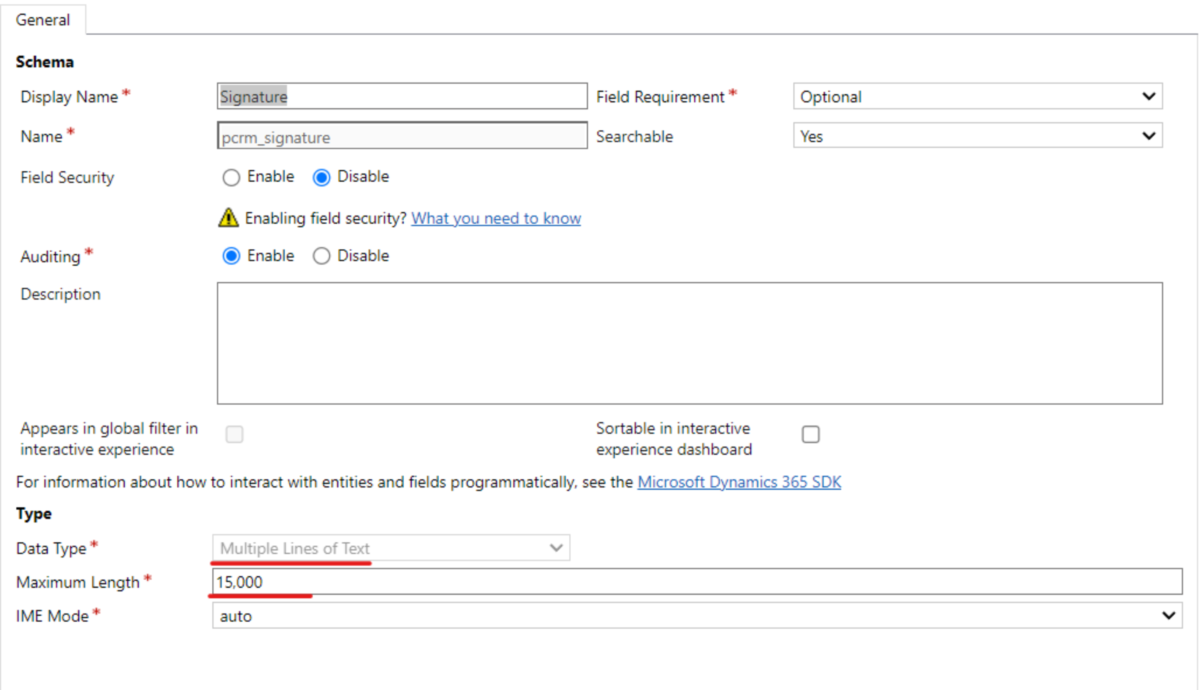
There are many occasions when a customer or client's signature is required, such as orders, customer approvals and snagging signoffs. An engineer could be on a client site and after doing final snagging there is a requirement to get the client to signoff the completed work. The ability to simply hand the client a tablet to sign and for moments later an email with an electronic copy of the documentation with the signature sent to them would be of great benefit.

This document is in two parts: -

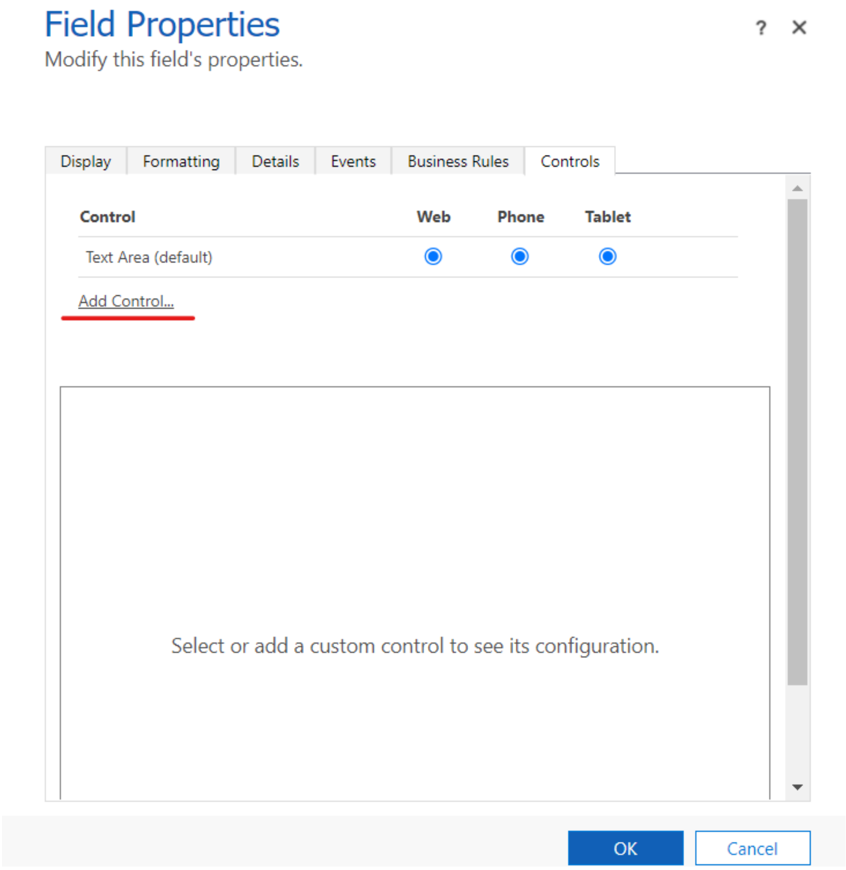
- How to add the new signature field to the form using the control
- Creating a word template with the document containing the client signature

Part 1 – Create field and add control to form: -

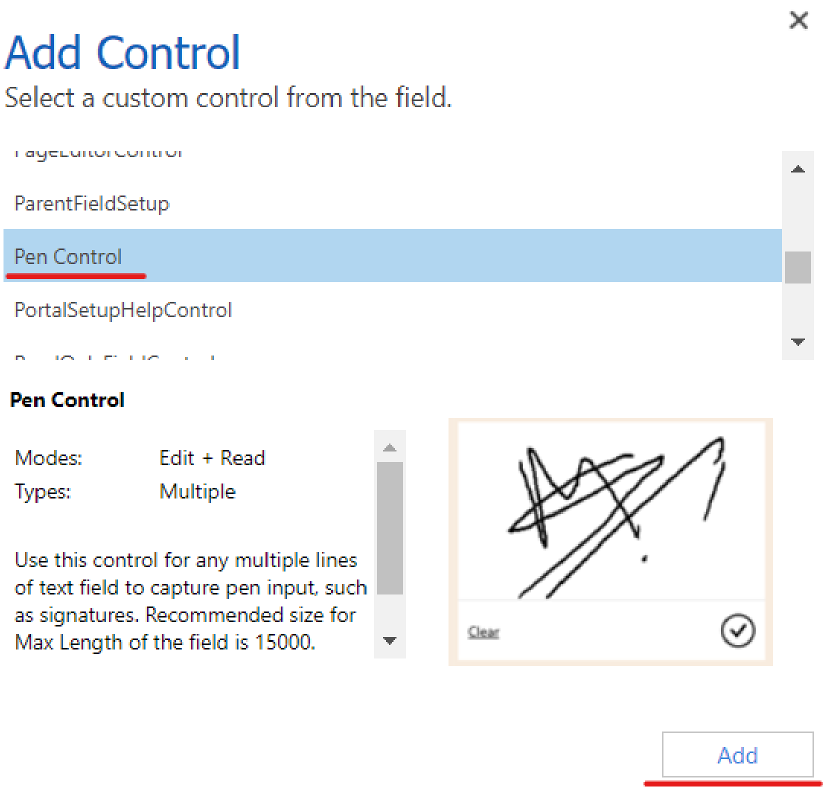
1. Within the customisation of the form, create a new field for the signature
    - It needs to be a memo field (Multi Lines of Text)
    - Characters at least 15,000



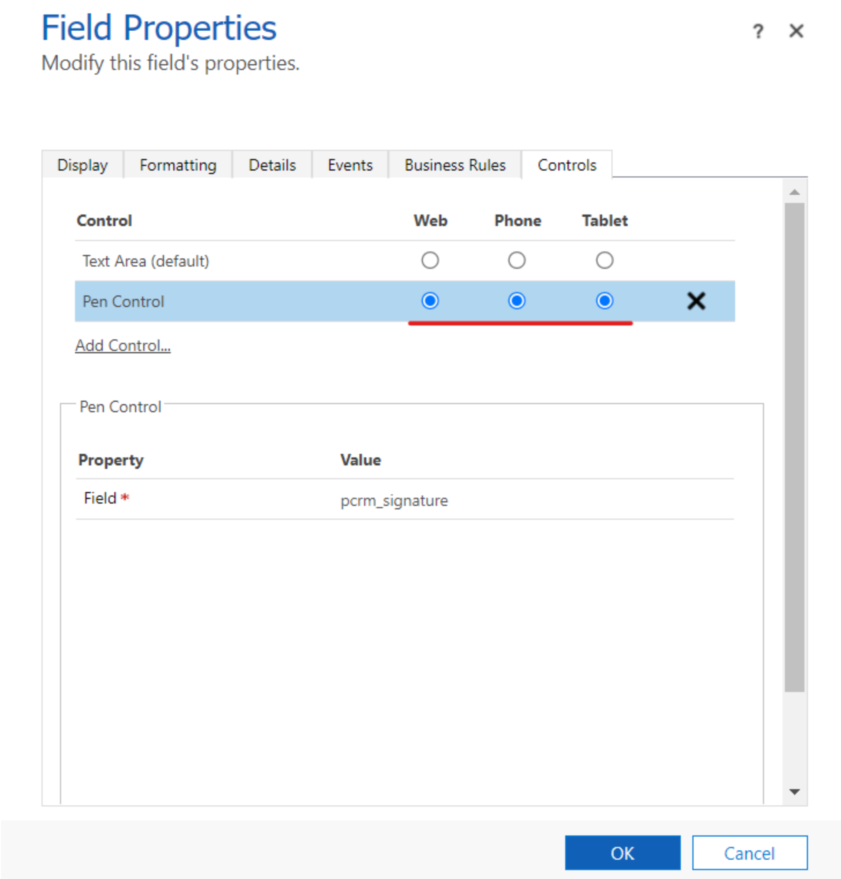
2. Then add the field to the form and click into the field.
3. Go to the 'Controls' tab, then click on the 'Add Control'.



4. From the list of controls find the 'Pen Control' and click Add



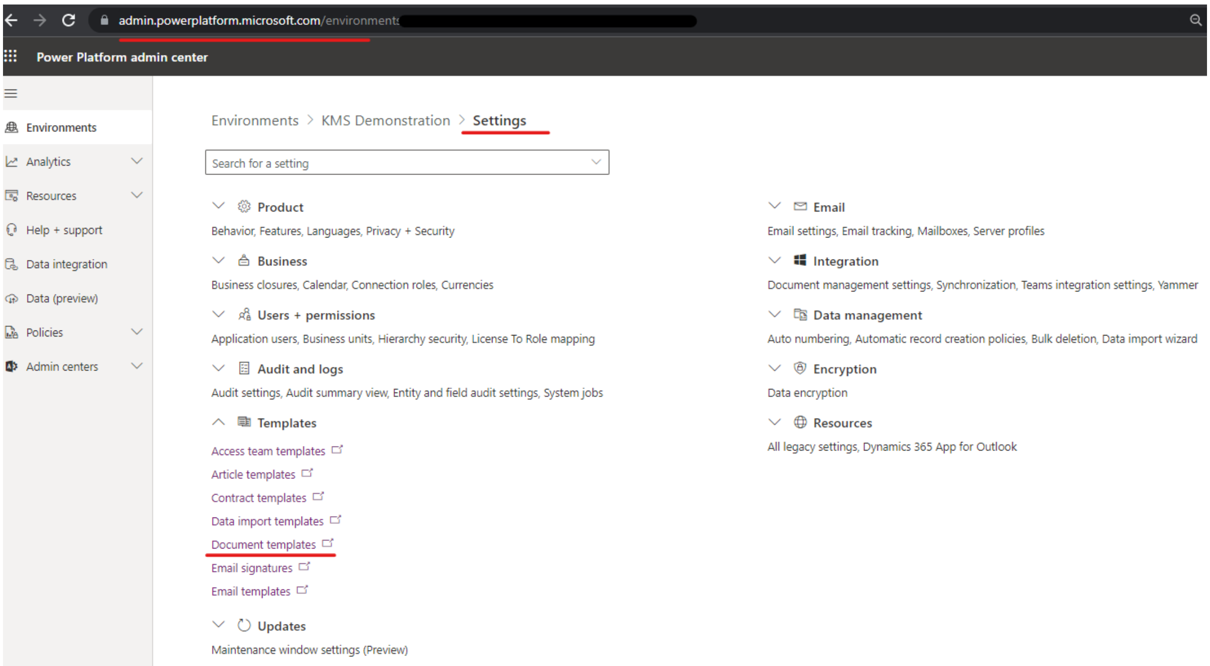
5. Select the 'radio buttons' for Web, Phone and Tablet, then click 'OK'



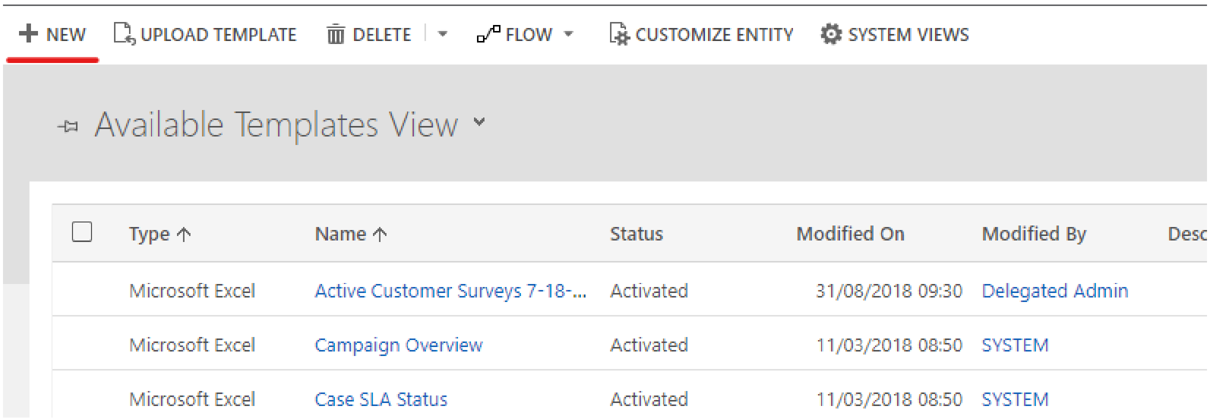
6. Now 'Save' and 'Publish' the form.
7. The form is now ready for a signature to be captured, if the user is not happy with the signature, they can choose to 'Clear' it, once the tick button is clicked it is read only.

Part 2 – Create Template with the new signature field: -

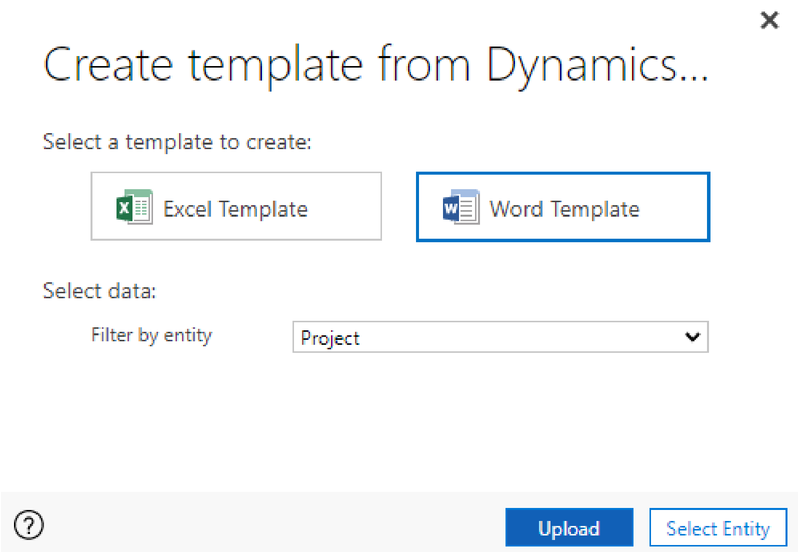
1. Within Dynamics go to admin.powerplatform.com, click on ‘Settings’, ‘Templates’ and then ‘Document Templates’.



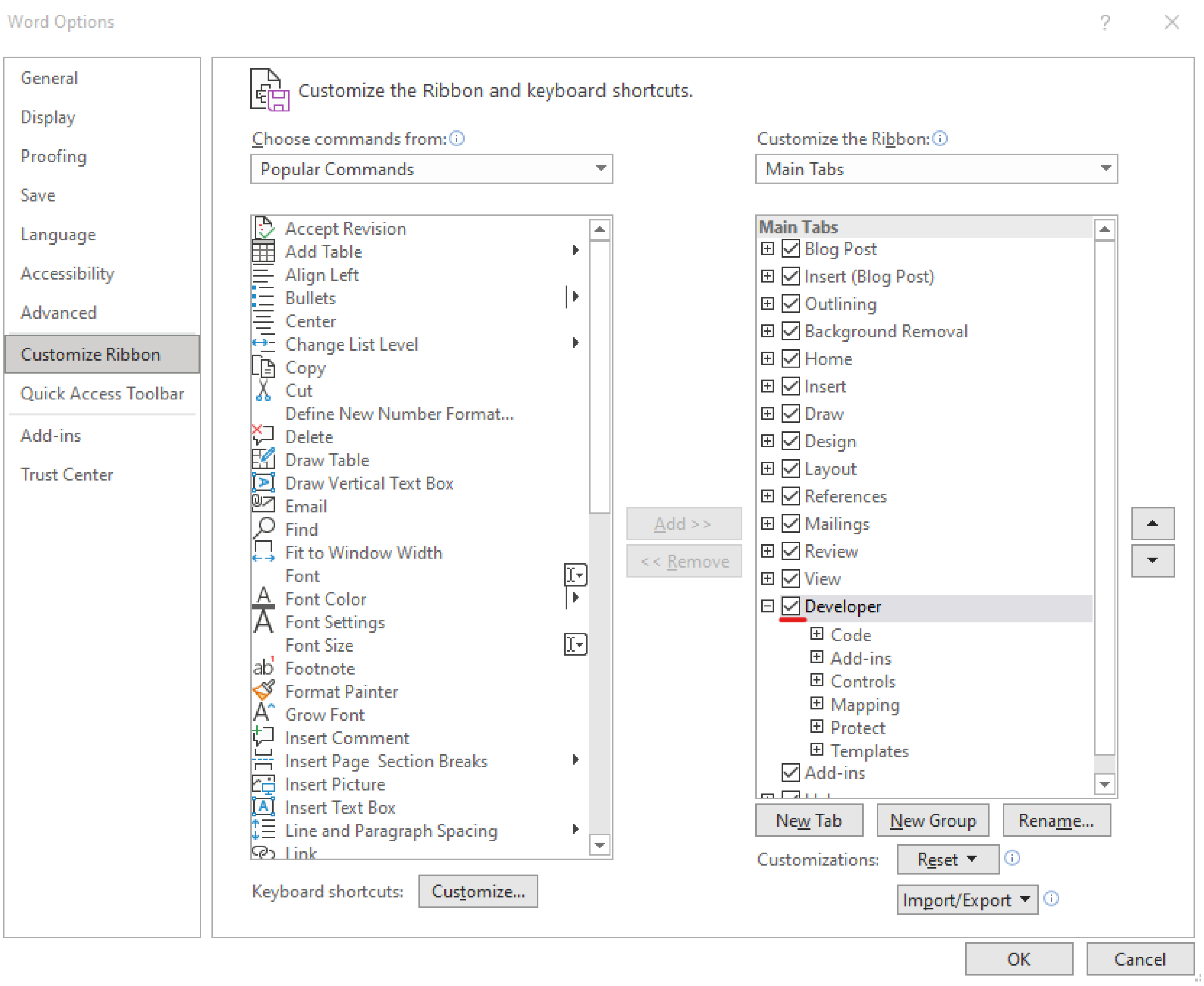
2. Create a ‘New’ template.



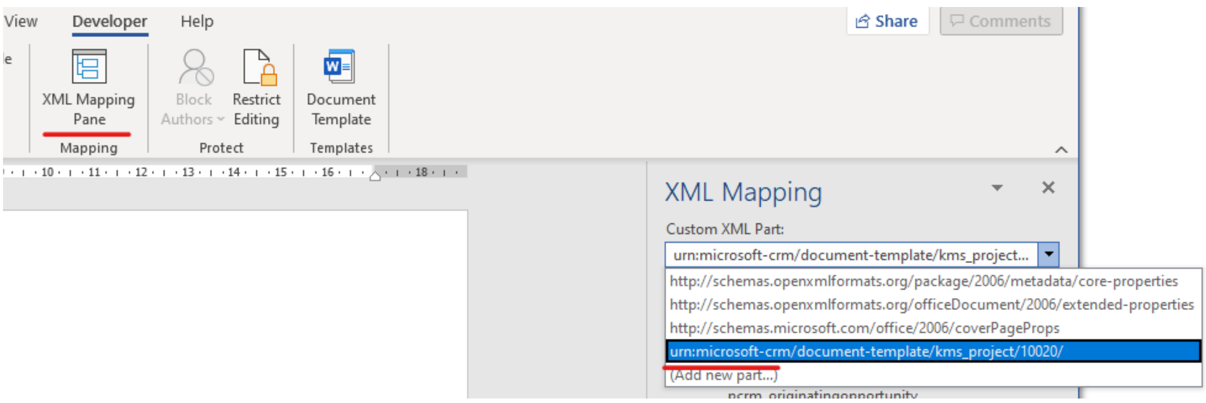
3. Select ‘Word Template’ and the entity that you want to create the template for. In this case ‘Project’, then click on ‘Select Entity’.



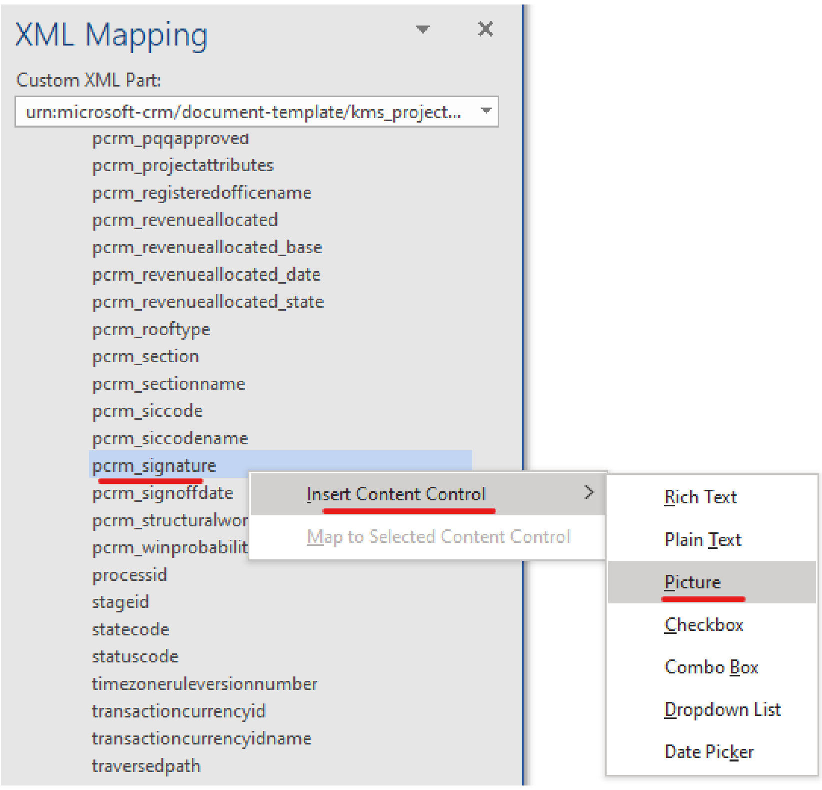
4. This will then download a word template, now open the file and ensure the developer tab is turned on within the word options.

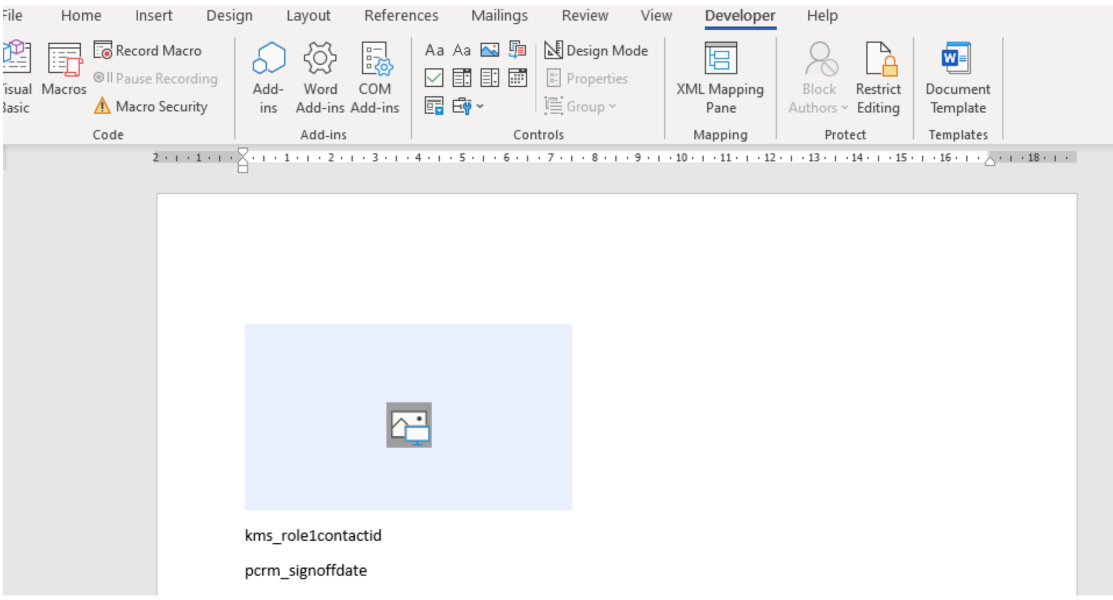


5. Within the ‘Developer’ tab select the XML Mapping Pane and then from the drop down choose the item that begins with ‘urn:Microsoft-crm/document-template’

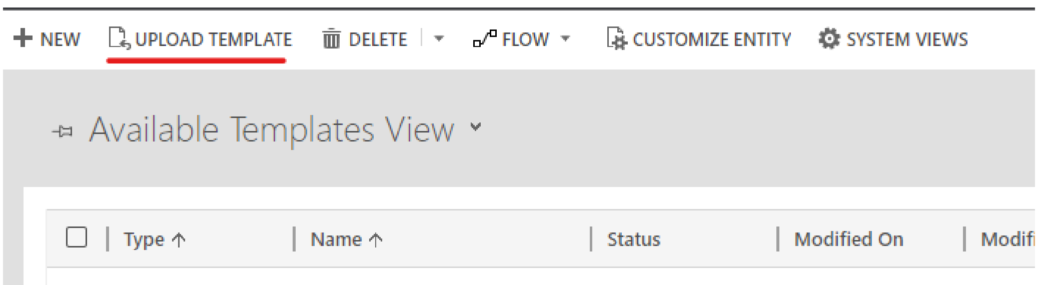


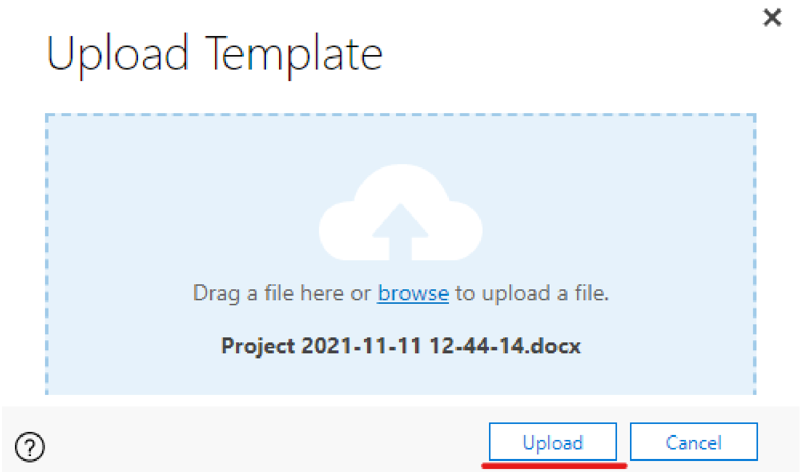
6. Now select the fields you wish to be in your template, including the new signature field which will be listed as the field name not the display name. Once selected right click on the field and choose the picture option.



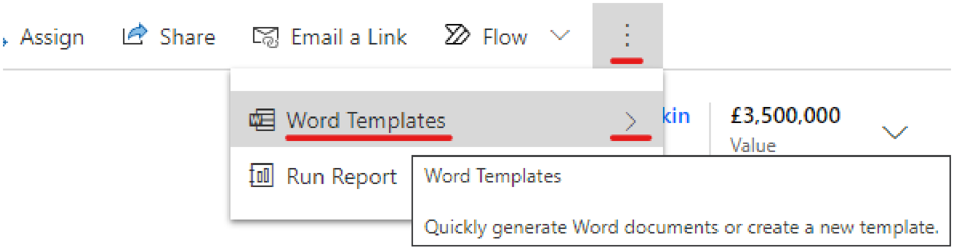


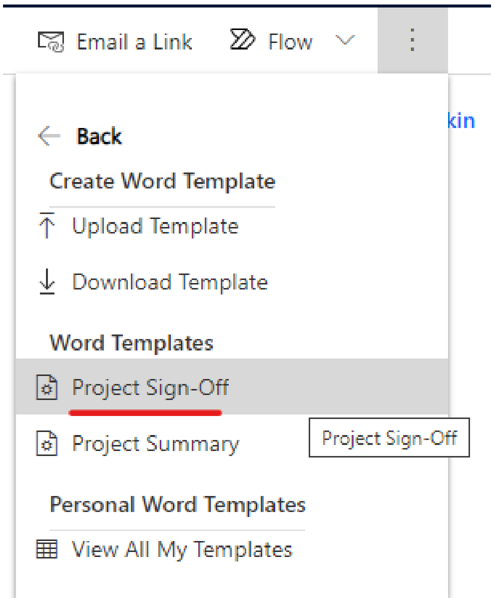
7. Then save and upload the template.



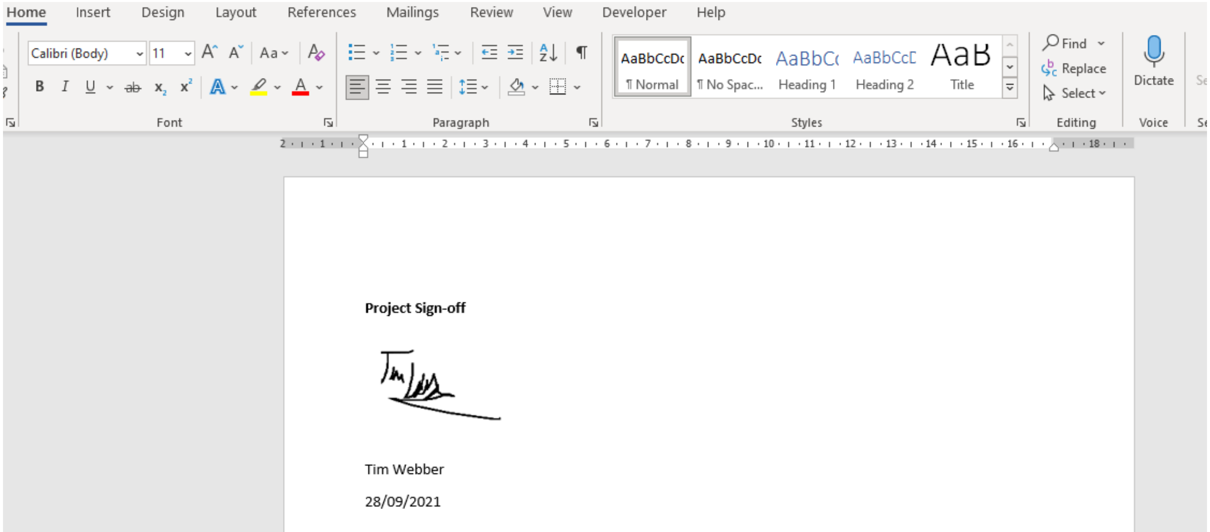


8. The word template can then be run from the entity form, by clicking on the ellipses and selecting ‘Word Templates’ -> then the template you saved.





9. The document will then be downloaded and can be opened and saved.



10. A workflow could be setup to email this template to the client.