

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.

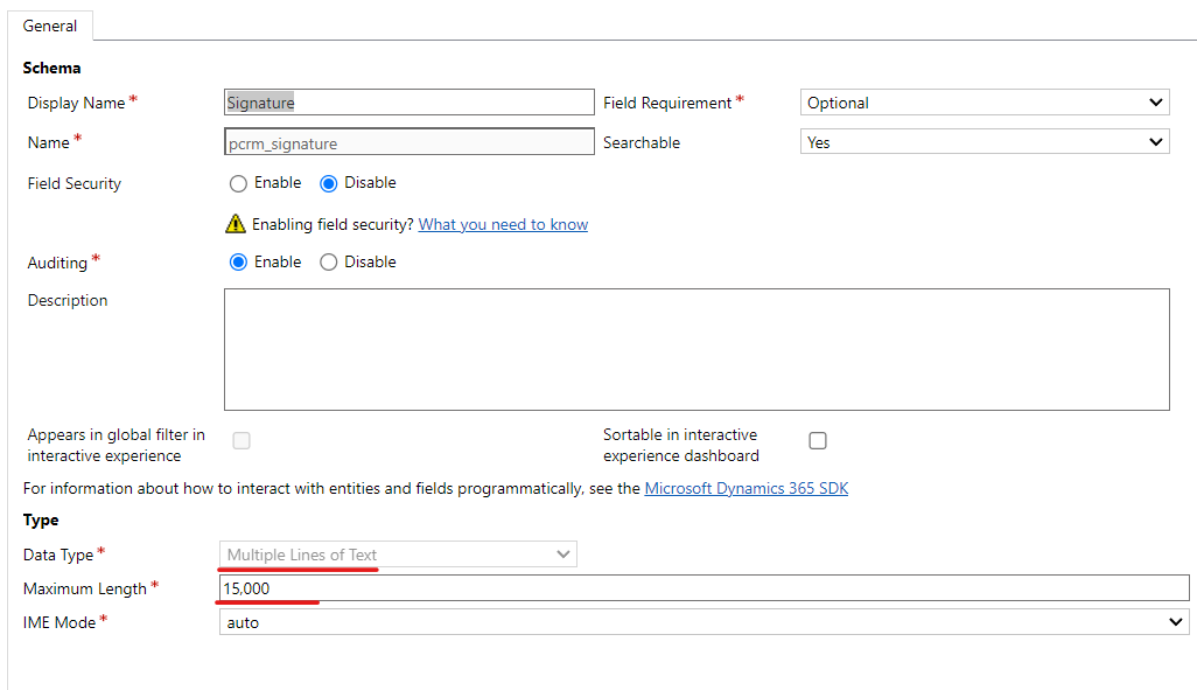
There are many occasions when a customer or client’s signature is required, such as orders, customer approvals and snagging signoffs. An engineer could be on a client site and after doing final snagging there is a requirement to get the client to signoff the completed work. The ability to simply hand 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



The screenshot shows the 'General' tab of a field configuration in Dynamics 365. The field is named 'Signature' with a schema name of 'pcrm_signature'. It is configured as a 'Multiple Lines of Text' field with a maximum length of 15,000 characters. The field requirement is set to 'Optional' and it is searchable. Field security and auditing are both enabled. The field does not appear in the global filter or the interactive experience dashboard. A link to the Microsoft Dynamics 365 SDK is provided for more information.

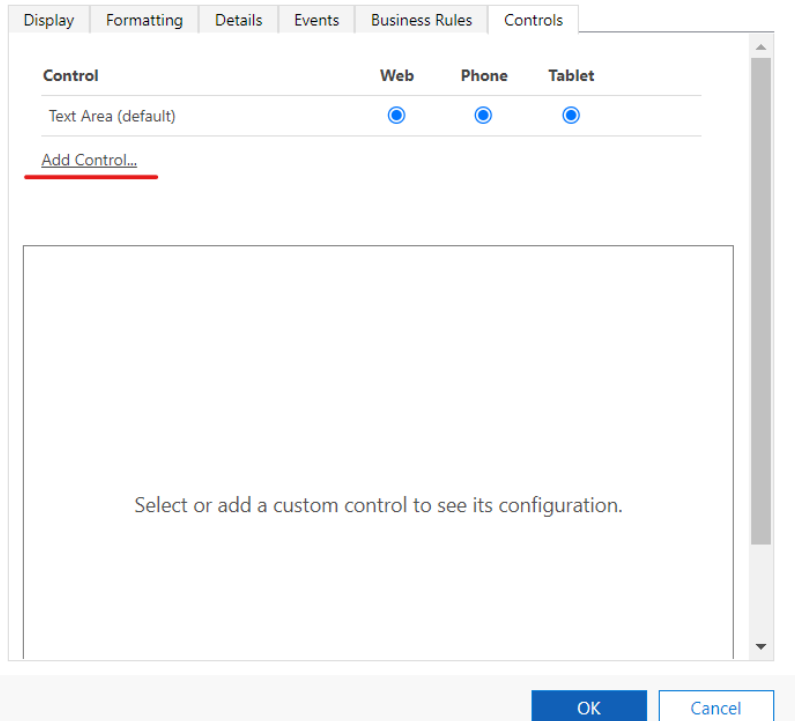
Schema	
Display Name *	Signature
Field Requirement *	Optional
Name *	pcrm_signature
Searchable	Yes
Field Security	<input type="radio"/> Enable <input checked="" type="radio"/> Disable
⚠ Enabling field security? What you need to know	
Auditing *	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Description	
Appears in global filter in interactive experience	<input type="checkbox"/>
Sortable in interactive experience dashboard	<input type="checkbox"/>
For information about how to interact with entities and fields programmatically, see the Microsoft Dynamics 365 SDK	
Type	
Data Type *	Multiple Lines of Text
Maximum Length *	15,000
IME Mode *	auto

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’.

Field Properties

Modify this field's properties.

? X



Control	Web	Phone	Tablet
Text Area (default)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

Add Control...

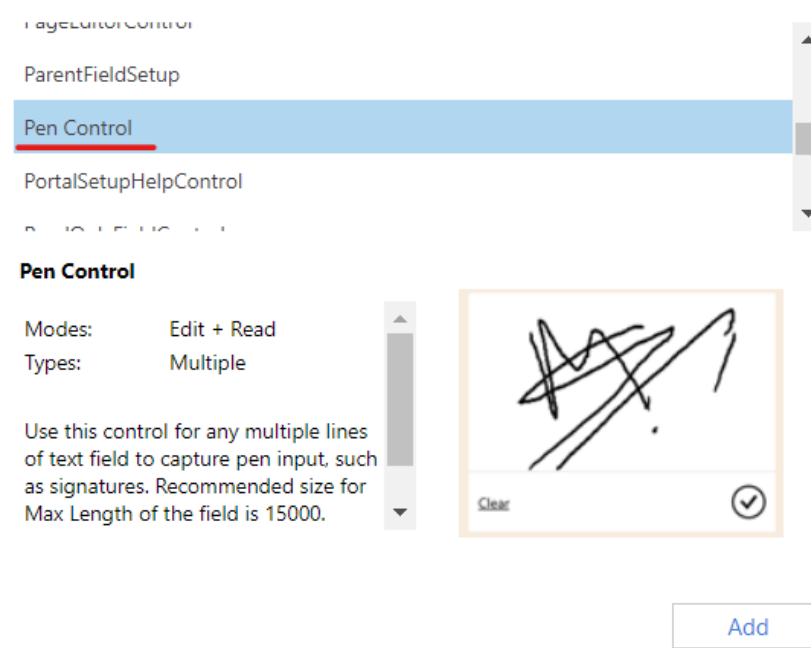
Select or add a custom control to see its configuration.

OK Cancel

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

Add Control

Select a custom control from the field.



PageEditorControl

ParentFieldSetup

Pen Control

PortalSetupHelpControl

Pen Control

Modes: Edit + Read

Types: Multiple

Use this control for any multiple lines of text field to capture pen input, such as signatures. Recommended size for Max Length of the field is 15000.

Clear

Add

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

Field Properties

Modify this field's properties.

Display
Formatting
Details
Events
Business Rules
Controls

Control	Web	Phone	Tablet	
Text Area (default)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Pen Control	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	✕
Add Control...				

Pen Control

Property	Value
Field *	pcrm_signature

OK
Cancel

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.



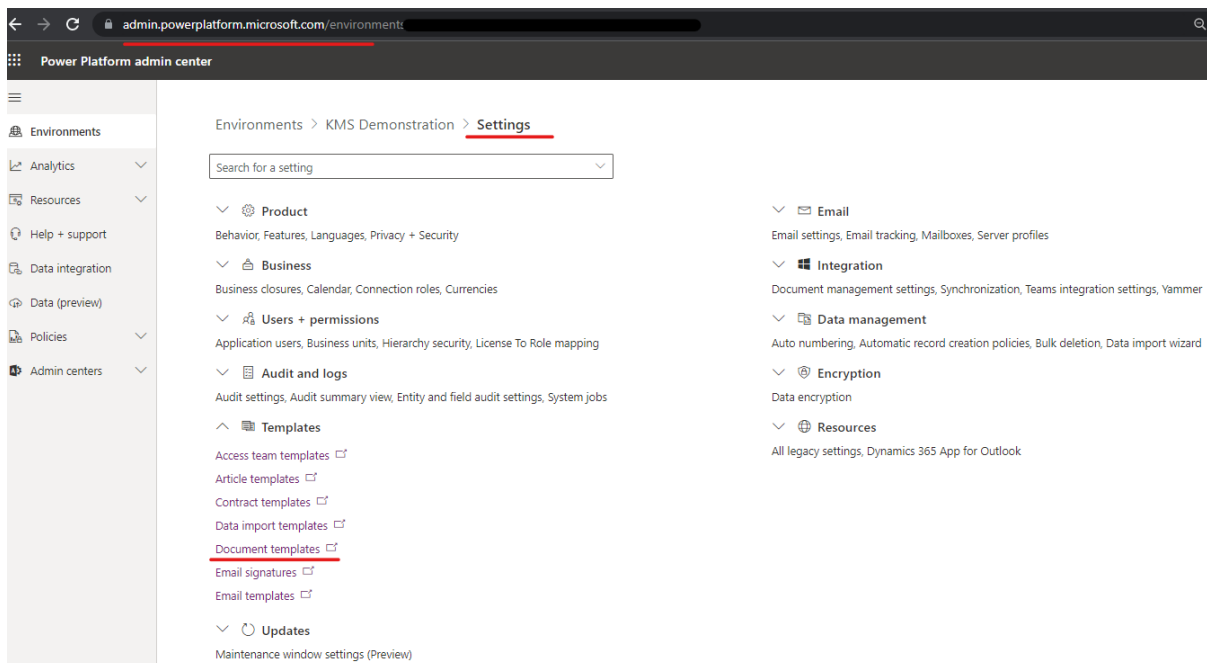
Clear





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

1. Within Dynamics go to [admin.powerplatform.com](https://admin.powerplatform.microsoft.com), click on 'Settings', 'Templates' and then 'Document Templates'.



2. Create a 'New' template.

+ NEW UPLOAD TEMPLATE DELETE FLOW CUSTOMIZE ENTITY SYSTEM VIEWS

Available Templates View

<input type="checkbox"/>	Type ↑	Name ↑	Status	Modified On	Modified By	Desc
	Microsoft Excel	Active Customer Surveys 7-18-...	Activated	31/08/2018 09:30	Delegated Admin	
	Microsoft Excel	Campaign Overview	Activated	11/03/2018 08:50	SYSTEM	
	Microsoft Excel	Case SLA Status	Activated	11/03/2018 08:50	SYSTEM	

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

Create template from Dynamics... ×

Select a template to create:

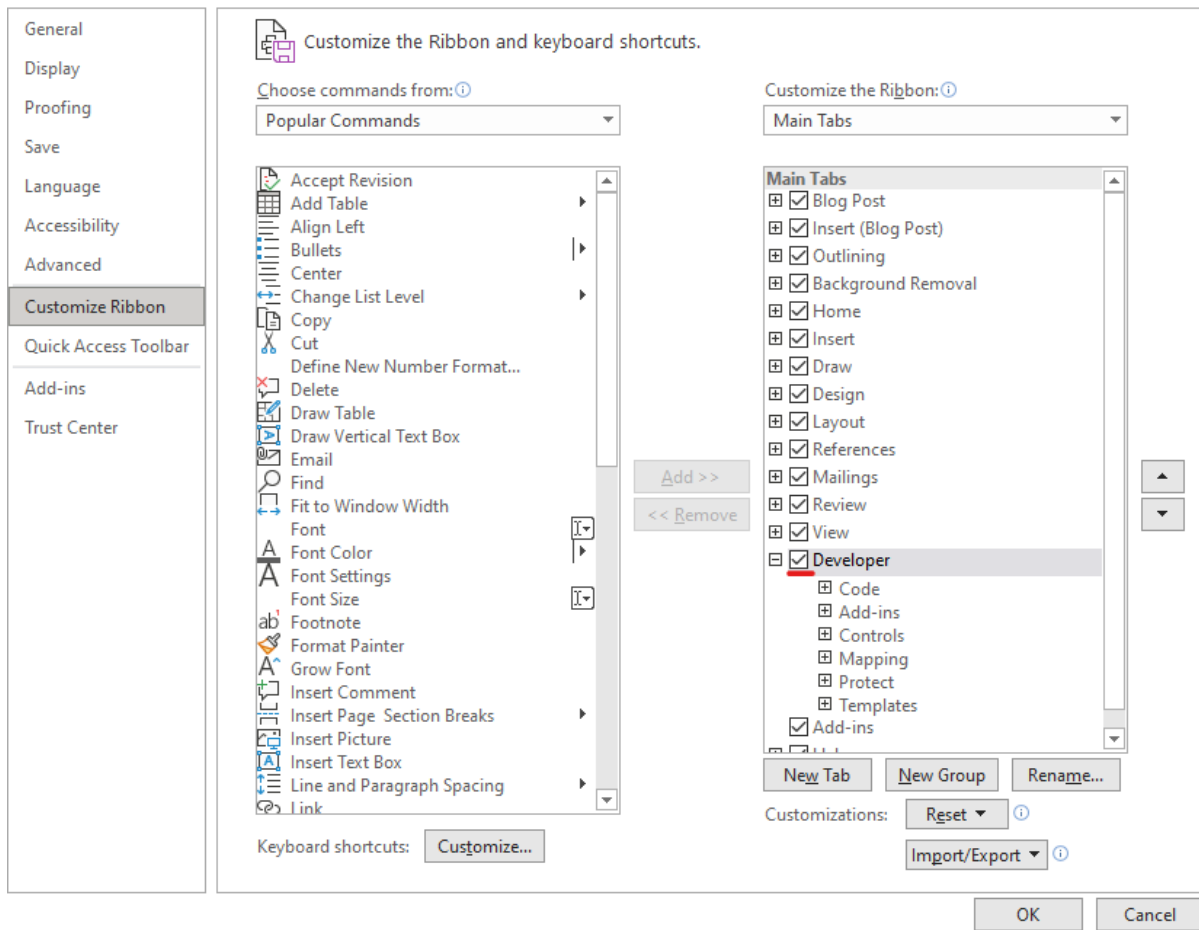
Excel Template Word Template

Select data:

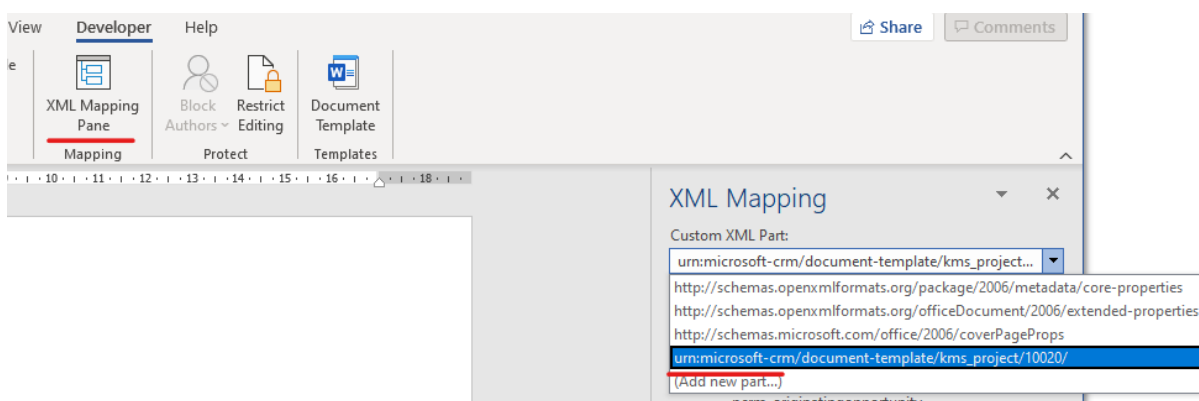
Filter by entity Project

?

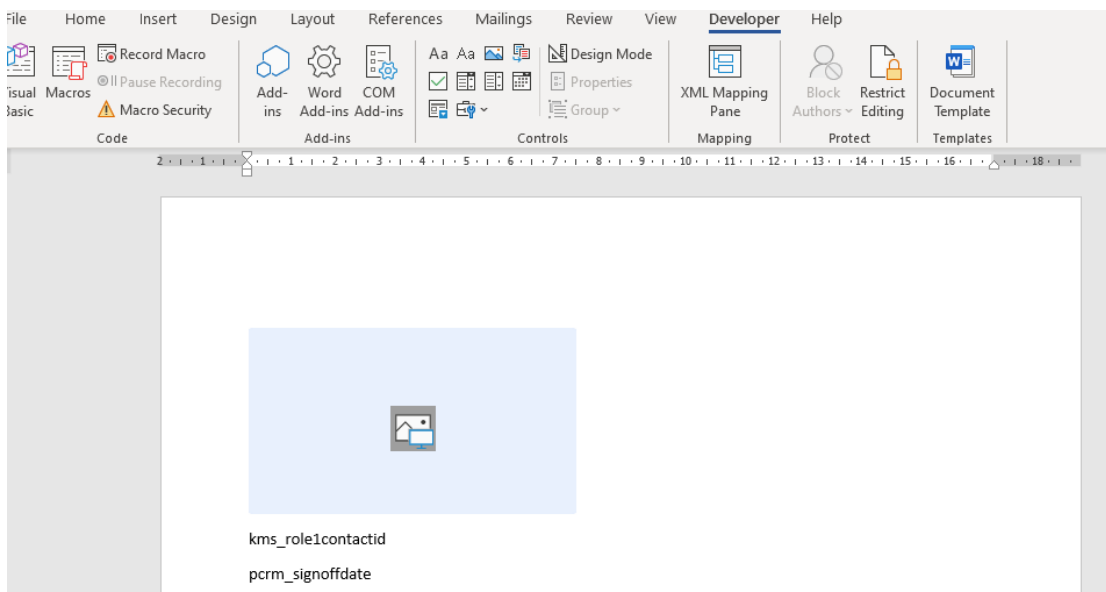
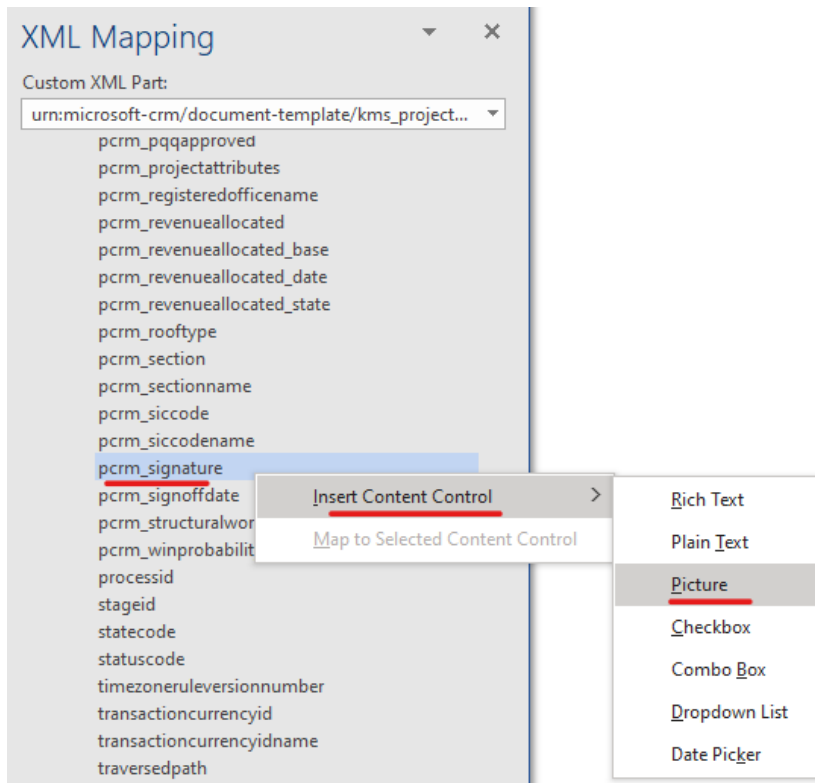
4. This will then download a word template, now open the file and ensure the developer tab is turned on within the word options.



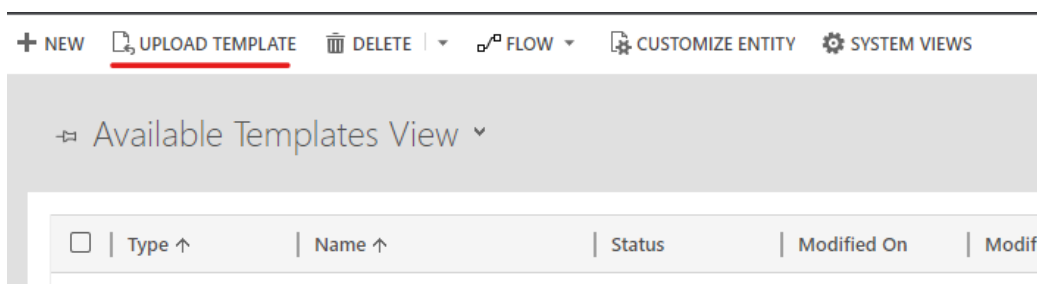
5. Within the 'Developer' tab select the XML Mapping Pane and then from the drop down choose the item that begins with 'urn:Microsoft-crm/document-template'



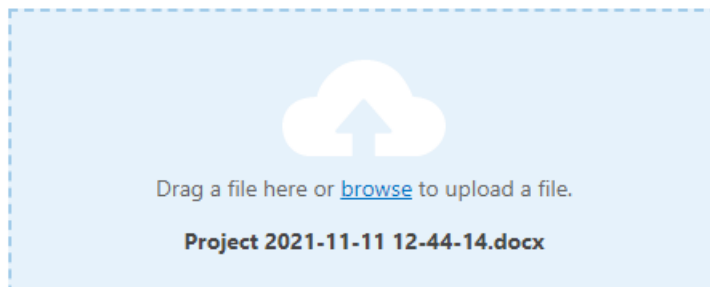
6. Now select the fields you wish to be in your template, including the new signature field which will be listed as the field name not the display name. Once selected right click on the field and choose the picture option.



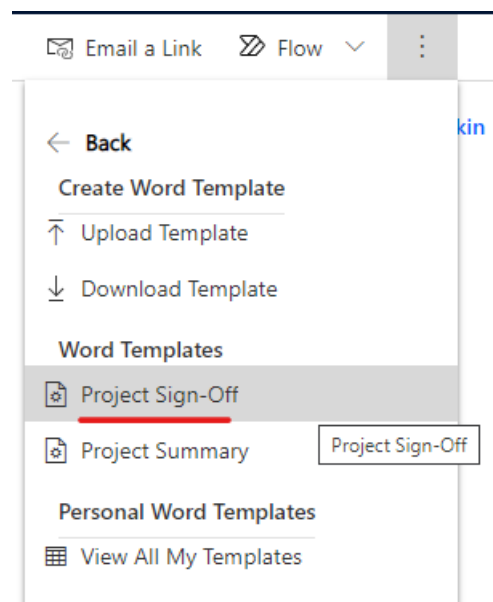
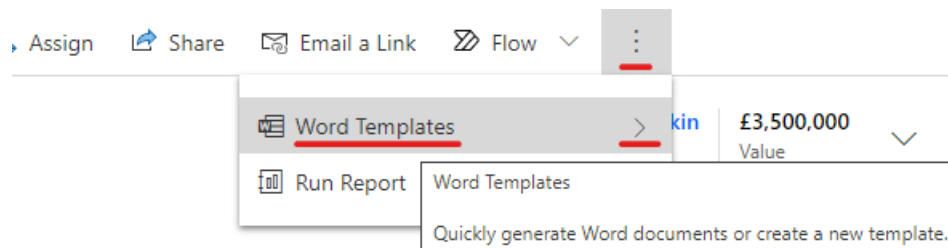
7. Then save and upload the template.



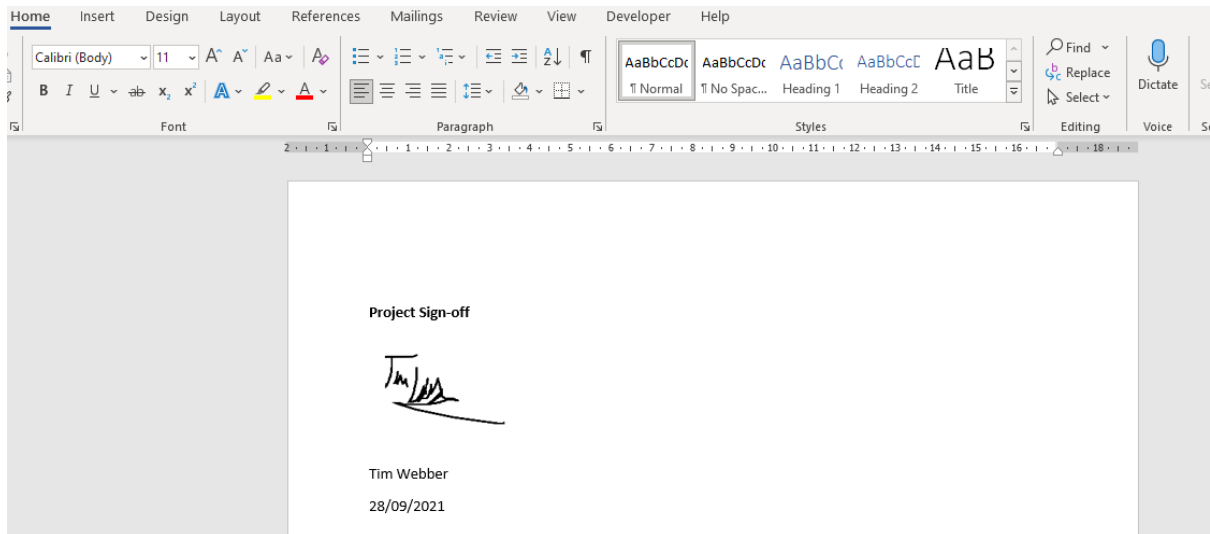
Upload Template ✕



- 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.