

Close business faster by automating agreements in Dynamics 365

Many organizations have modernized their customer relationship management (CRM) with Microsoft Dynamics 365. Yet customer agreements are still done manually with paper and scanners. The result is long lead times, error-prone data entry, and a frustrating customer and employee experience.

Agree better

DocuSign eSignature for Microsoft Dynamics 365 enables businesses to automate and streamline their agreement workflows. Send documents for signature directly from Dynamics. Pre-populate fields with information from CRM. Capture customer information during signing. Store captured information and documents in Dynamics or SharePoint upon completion. Track agreement status in real-time. Do it all within Dynamics.

Key capabilities

Automate the agreement process

Create custom workflows that trigger agreements with the click of a button. Send the right documents to the right contacts quickly and easily. Automatically merge data from Dynamics to DocuSign and back to ensure transactions are fast, easy and error-free. Once the document is signed and completed, it is automatically saved to the Dynamics record to ensure your documents are all in one place.

Easily set up and administer

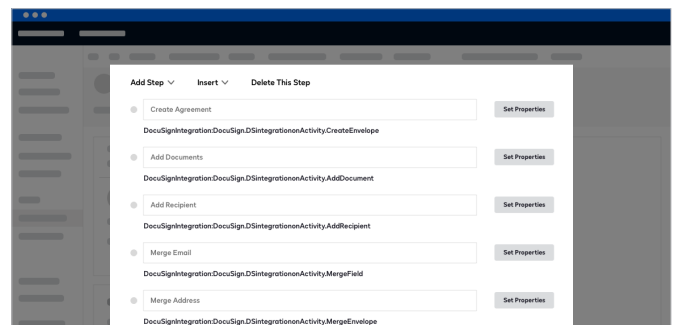
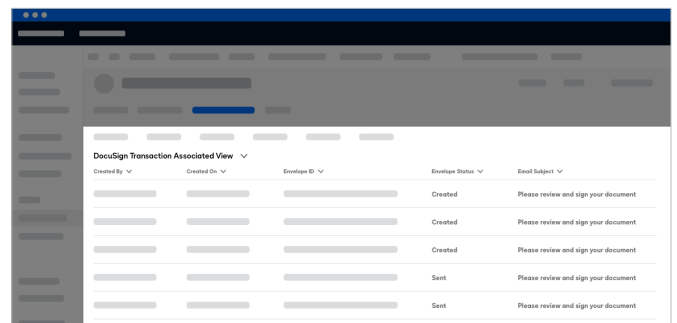
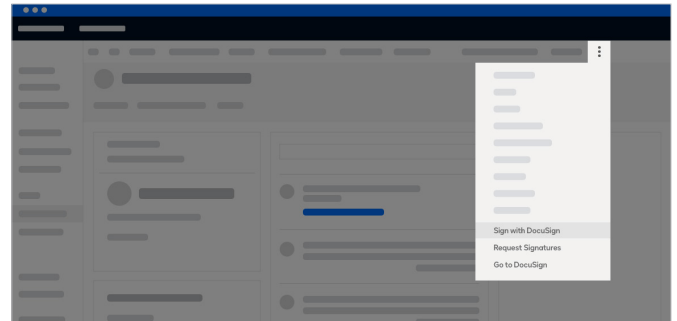
Reduce the cost and risk of integration. Save administrative time and hassle as your team gets up and running with our pre-built integration, enabling rapid deployment.

Accelerate time to results

See an immediate return on your investment by reducing paper-based costs and increasing turnaround time. DocuSign customers report average savings of \$36 per document.

Customize with clicks, not code

Create custom buttons for repeatable tasks without the need for code. Generate and send documents for signature by merging data from your CRM to DocuSign.



Add visibility to the agreement process

Track your agreement status in real time directly in Dynamics. Receive notifications when a recipient signs or the status changes so you are always on top of it. View the full signature history with a complete audit trail.

Increase productivity

Give your sales team a break by automating the administrative work associated with contracts. No more copy/paste, saving documents to a record manually, or emailing to check in on the status of a signature.

Integrate with other tools

DocuSign eSignature for Microsoft Dynamics 365 integrates directly with SharePoint to save and store completed documents. Connect to Power Automate to run flows automatically or on demand. Receive notifications directly in Teams. Other Microsoft integrations include Outlook, Word, SharePoint Online, Power Automate and Teams.

Deliver a great experience for customers, vendors and partners

Everyone wants fast and easy today. Keep your everyone happy with a lightning quick, error free and seamless agreement experience.

Protect your important agreements and data

DocuSign meets or exceeds stringent US, EU and global security standards including ISO 27001:2013 and Soc 1 and 2. Also available in Microsoft GCC environments.

Ready for next steps?

Talk to your DocuSign sales representative about a demo of [DocuSign eSignature for Dynamics 365](#).

Use cases

Sales

- Contracts
- Statements of work
- Master service agreements
- Quotes
- Proposals
- Discount lists
- Renewal contracts
- Services approvals

Human Resources

- Compensation plans
- Offer letters
- W-9s

Financial Services and Insurance

- New account openings
- Account servicing

Public Sector

- Case management
- FIA requests

Healthcare/Life Sciences

- Copay assistance
- Patient consent



About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

DocuSign, Inc.
221 Main Street, Suite 1550
San Francisco, CA 94105

[docuSign.com](https://www.docuSign.com)

For more information
sales@docuSign.com
+1-877-720-2040