



# Close it in the Cloud within Microsoft Dynamics 365 for Operations



## Do business faster, reduce costs and increase efficiency

### Key features

- **Sales** - Close more deals faster, turning a verbal “yes” into a signed agreement or purchase order in minutes.
- **Procurement/Supply Chain** - Get approvals for purchases faster and seamless approvals for purchase agreements.
- **Operational Efficiency** - Reduce cost by automating paper business processes.

### Trustworthy & secure

Documents are encrypted and stored tamper-proof in the cloud, ensuring integrity during the transaction process and after completion. DocuSign warrants compliance with the December 1999 Federal E-SIGN Act, which established a community framework for the users of electronic signatures on electronic contracts.

By connecting DocuSign and Microsoft Dynamics 365 for Operations, Sable37 empower users to send, sign and approve documents quickly via electronic signature approvals. Whether it's Sales Quotations, Purchase Orders, Sales or Purchase Agreements; say goodbye to printing, scanning, faxing, overnight shipping, or re-keying. Make it easier for your teams, customers and partners to do business, empowering them to sign documents from any browser, including mobile devices, within moments.

### Easy, Straight-forward Operation

Sending a document for electronic signature has never been easier. Simply confirm and print the document within Microsoft Dynamics 365 for Operations. Documents are auto-routed to the right people, with reminders & expiration times:

- Decision makers can review & approve documents within minutes
- Signed agreements are legally binding and backed by a court-admissible audit trail.

DocuSign for Microsoft Dynamics 365 for Operations handles many different scenarios, including:

- Multiple signers
- Specified signer routing order
- Delegation of signing responsibility to others.

### Complete & extensible

Automate simple agreements or the most complex multi-party transactions. Our open, standards based approach makes it easy to connect to your existing business systems.

### Gain more control and visibility into the process

DocuSign for Dynamics 365 for Operations provides an audit trail of edits, and notifies every signer when a document has been changed. This helps streamline a negotiation, reduce errors, shorten the sales cycle and lower cost.

## How DocuSign Works

### Easy to Send

...this agreement has been executed in duplicate, whereby both buyer and seller have retained one copy each.



Signature: \_\_\_\_\_

Name: John Hancock

### Easy to Complete

...this agreement has been executed in duplicate, whereby both buyer and seller have retained one copy each.

Signature:

Name: John Hancock

### Easy to Store

Your signed documents were submitted successfully.



Your signed documents were submitted successfully.

Close

Save Online ▶

With DocuSign for Dynamics 365 for Operations, you can track the status of the document and once, completed view the signed document attached to the Dynamics record. Receive notification via email to confirm a document has been completed or declined.

Document type configuration interface showing fields for Document name, Template, Print management, General, PRINT MANAGEMENT, REPORT NAME, AUTO SEND, Report format, Advanced, ADVANCED SETTINGS, RECIPIENT PRIVILEGES, REMINDERS, and EXPIRATION.

Document Types – Multiple document types can be preconfigured to utilise DocuSign advanced features and the ability to ‘auto send’ the document from AX directly to the signers.

TEMPLATES PO Templat : PO Template configuration interface showing Signatories table and Signatory details table.

Setting	Description	Dependency	Type
1	Purchasing Manager	0	Internal
2	Vendor	1	External

  

Tag	Position	Anchor string	X	Y	Unit	Page	Page number
Signature	Anchor	Signature	1020	20	Pixels	All	
Initial	Fixed		5000	20	Pixels	All	

Templates – Document templates can be easily preconfigured allowing DocuSign ‘tags’ to be placed onto the AX document using either an Anchor (word) or fixed position

## The world’s leading eSignature and Digital Transaction Management solution

Established in 2003, DocuSign is the pioneer in electronic signatures and the world’s leading digital transaction management solution. With more than 50 million customers, DocuSign serves more individuals, small and medium businesses than any other service provider.

### About DocuSign

DocuSign® is the Global Standard for Digital Transaction Management™. DocuSign accelerates transactions to increase speed to results, reduce costs, and delight customers.

For enquiries contact Sable37

email: [sales@sable37.com](mailto:sales@sable37.com) | [www.sable37.com/apps](http://www.sable37.com/apps)

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### Sable37 Apps for Dynamics 365

Sable37 Apps are a range of Microsoft Dynamics 365 extensions, sold and supported globally by leading Dynamics 365 specialists, Sable37. Delivering world-class best practice industry solutions, Sable37 service local and global companies with offices in North America, Asia Pacific, India and the Middle East.