

MARSHFIELD
consulting

DOCUSIGN CLM CONNECTOR

FOR MICROSOFT
DYNAMICS



Dynamics 365



docuSign

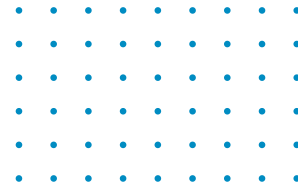
Bringing Agreements to Life

DocuSign CLM Connector for DocuSign CLM and Microsoft Dynamics

www.marshfieldconsulting.com

Marshfield Consulting

DocuSign CLM Connector for Microsoft Dynamics



Bringing the power of DocuSign CLM to Dynamics

Marshfield Consulting is excited to have created the ability with our Connector for DocuSign CLM and Microsoft Dynamics to integrate and work together as part of streamlining Sales and Contract operations.

The Marshfield Consulting DocuSign CLM Connector creates the ability to integrate DocuSign CLM with Microsoft Dynamics 365 to streamline the contract lifecycle management (CLM) process around Sales Contracts to increase productivity and shorten sales cycles.

The connector combines the user experience in Dynamics 365 with the powerful features of DocuSign CLM by allowing sales users to quickly create or upload a contract to initiate the CLM process and then allowing them to access the contract through an embedded widget available on the Account or Opportunity (or Other) page.



DocuSign CLM Connector for DocuSign CLM and Microsoft Dynamics

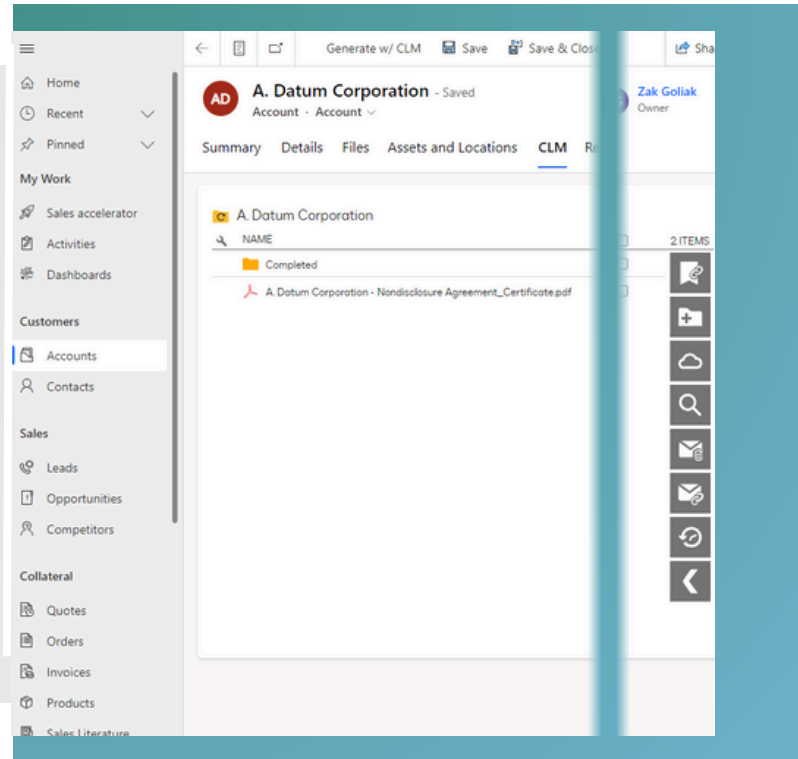
Marshfield Consulting A Fully Integrated Experience

About the Dynamics CLM Connector

Embed contract documents, in-flight and at rest, within the familiar Dynamics 365 interface to keep them at the fingertips of your end users

Unlock the rich data in Dynamics 365 and use it to power CLM and quickly generate contracts and start contract workflows in DocuSign CLM

Access the full and complete Contract Lifecycle Management capabilities of DocuSign CLM's AI-powered platform including workflow routing, approvals, redlining, eSignature, expiration/renewal reminders, and the use of AI to extract and summarize key contract details



01. A Unified Approach

The DocuSign CLM Connector embeds DocuSign CLM within the Dynamics interface to unify Sales and Contract processes

02. Accelerate Quote-to-Cash

The combined capabilities of Dynamics 365 with DocuSign CLM provide the framework to streamline the transition from Sales to Contracting to close deals faster

DocuSign CLM Connector for DocuSign CLM and Microsoft Dynamics

Marshfield Consulting Power CLM With CRM Data

Leverage data within your CRM to power document generation and contract management capabilities

Engage with rich data in Dynamics and use it to generate contracts quickly, efficiently and always using the approved template

Create dynamic CLM workflows and better manage risk by creating approval rules based on CRM data like value, location, discounting, etc.

The screenshot shows a DocuSign interface for a document titled "Building NDA". The main heading is "1. Complete Form". Below this, there are instructions: "Review the form on this page and fill out the required fields to prepare your document. We'll save your changes as you fill it out." and "Once you've finished, select next to preview your document." To the right, there is a "Party Information" section with the following fields:

- Party Name: A Datum Corporation
- Business Contact Name: Rene Valdes
- Business Phone Number: 555-0108
- Party Street: 2137 Birchwood Dr
- Party City: Redmond
- Party State or Province: WA
- Party Zip or Postal Code: 78214

Key Features

01. Admin Experience

Admins are provided an interface to map fields from Dynamics to predefined DocuSign CLM Document Generation configurations using clicks, not code

02. Self-Service Capabilities

End users are able to generate contracts, initiate CLM processes, participate in CLM workflows, and maintain visibility to contract all from within Dynamics

03. Connected Data

Expedite contract creation, reduce drafting errors and minimize duplicate data entry by sourcing fields directly from Dynamics when building contract documents

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Powerful Doc Gen Using Dynamics Data

Dynamically push Dynamics CRM data into DocuSign for always accurate, carefree document generation. Reduce duplicate entries, cut down on errors, and ensure your most current templates are used by combing your Dynamics Data with DocuSign CLM's robust doc gen capabilities.

The image shows a side-by-side comparison of a DocuSign form and a Dynamics CRM record for 'A. Datum Corporation'. Red circles highlight specific data points in both systems, with red lines connecting them to show data synchronization.

DocuSign Field	Dynamics CRM Field
Party Name	Account Name
Business Contact Name	Business Type
Business Phone Number	Phone
Party Street	Address 1: Street 1
Party City	Address 1: City

Driving CLM Success For You And

International Customers

Domestic Customers

Marshfield Consulting Contracts In Context



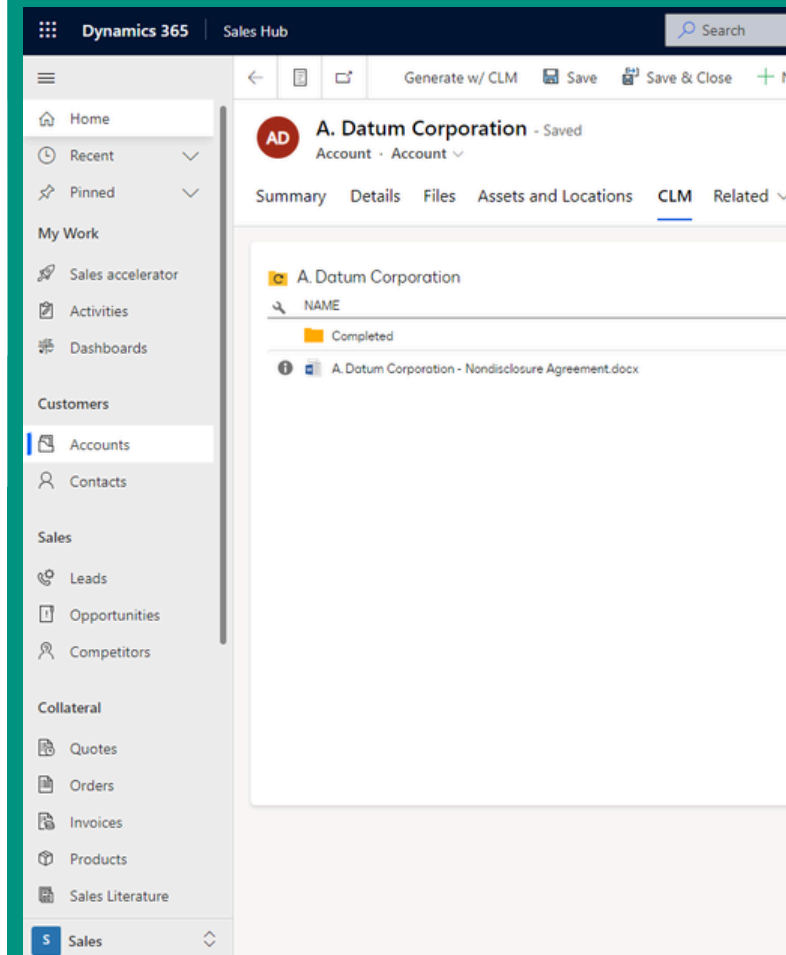
A Comprehensive CLM Experience

Access the complete contract lifecycle management capabilities of DocuSign CLM's AI-powered platform, including workflow routing, approvals, redlining, eSignature, and more

Key contract details can be extracted and summarized using AI, providing an intelligent end-to-end CLM solution

Description

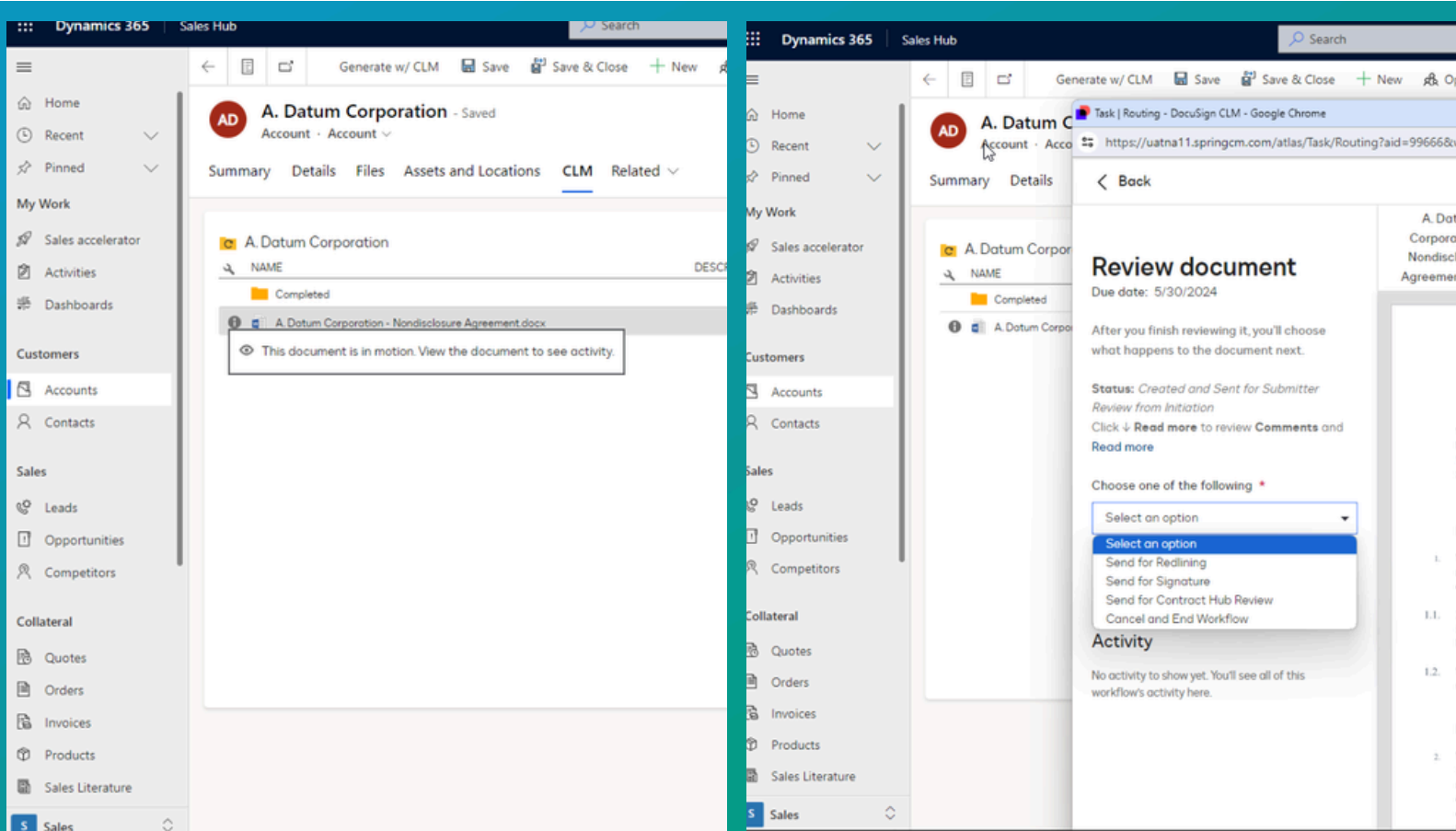
- Enables users to engage with the rich data in Dynamics while initiating or participating in Contract Workflows orchestrated by DocuSign CLM
- Provides transparency to in-flight and completed contracts in context of the familiar Dynamics interface via the CLM Folder Explorer



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Leverage a Complete CLM Solution

Setting up the connector is just the beginning with DocuSign CLM. Address every aspect of your end-to-end CLM process with DocuSign CLM and leverage DocuSign's full and robust CLM feature set to configure and address your own specific contract challenge.



A Full-Featured Solution

Access the complete Contract Lifecycle Management capabilities of DocuSign CLM's AI-powered platform, which includes workflow routing, approvals, redlining, eSignature, expiration/renewal reminders, and the ability to extract and summarize key contract details through use of AI.

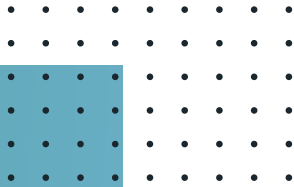
Marshfield Consulting Configuring And Using The Connector



Quick Set Up, Lasting Benefits

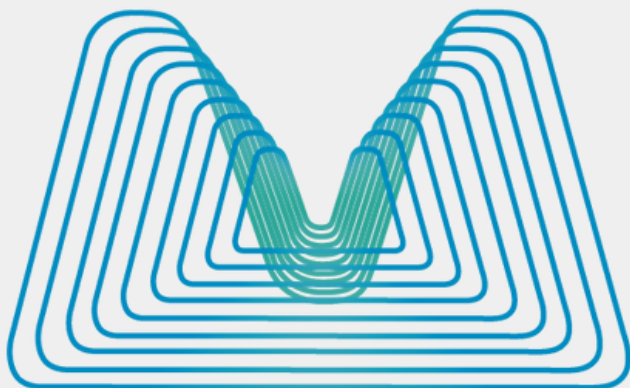
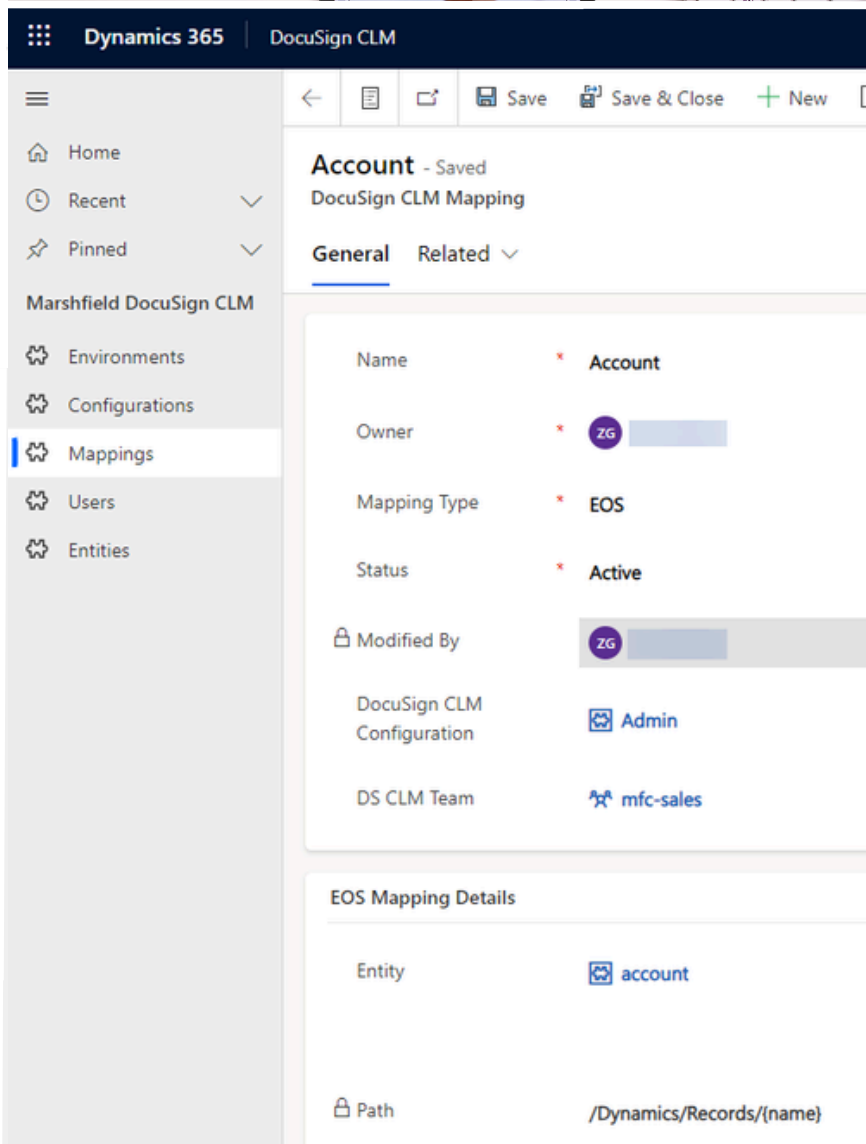
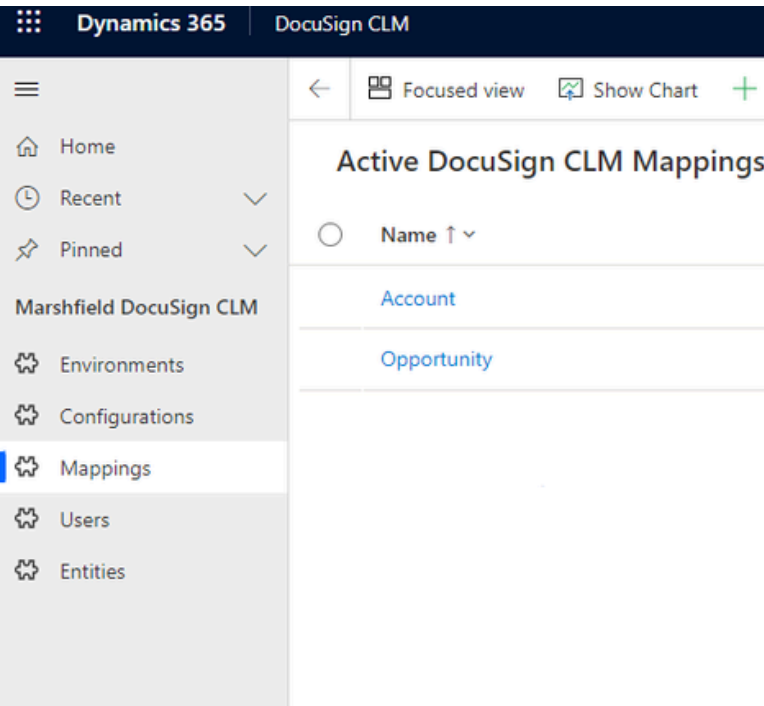
The set up process is generally a one-time event and easy to install and connect. Documentation on the install process is provided to new clients.

Once the connector is set up and the CLM solution fully implemented, users can take advantage of the enhanced CLM capabilities like contract generation, workflow and eSignature.

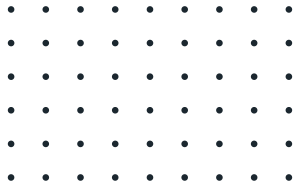


<p>Customer Service admin ...</p> <p>A unified app for customer service administration.</p> <p>microsoftdynamics</p> <p>UNIFIED INTERFACE</p>	<p>Customer Service Hub</p> <p>A focused, interactive experience for managing your customer service.</p> <p>Default Publisher for mfc-sales</p> <p>10/21/2023</p> <p>UNIFIED INTERFACE</p>	<p>Customer Service worksp...</p> <p>Multi-session Customer Service with Productivity tools</p> <p>microsoftdynamics</p> <p>UNIFIED INTERFACE</p>	<p>Dataverse Accelerator App</p> <p>Discover the latest feature set available in Dataverse with more</p> <p>microsoftdynamics</p> <p>UNIFIED INTERFACE</p>	<p>DocuSign CLM</p> <p>Marshfield Consulting</p> <p>UNIFIED INTERFACE</p>
<p>Power Pages Management</p> <p>Configure and manage your online platform to communicate and</p> <p>Microsoft First Party</p> <p>UNIFIED INTERFACE</p>	<p>Sales Hub</p> <p>Modernize the sales experience with this mobile relationship</p> <p>microsoftdynamics</p> <p>UNIFIED INTERFACE</p>	<p>Sales Team Member</p> <p>Team Member access to the Dynamics 365 Sales app module.</p> <p>microsoftdynamics</p> <p>UNIFIED INTERFACE</p>	<p>Solution Health Hub</p> <p>Solution Health Hub enables rules-based validation on the health of</p> <p>microsoftdynamics</p> <p>UNIFIED INTERFACE</p>	

Marshfield Consulting Configuring And Using The Connector



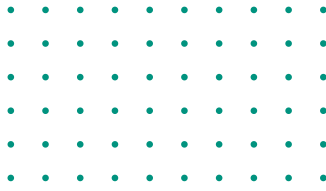
Marshfield Consulting Perform CLM Functions without Leaving Dynamics



The screenshot displays the Microsoft Dynamics 365 Sales Hub interface for the account 'A. Datum Corporation'. The interface includes a left-hand navigation pane with categories like 'My Work', 'Customers', 'Sales', and 'Collateral'. The main content area shows account details such as 'Annual Revenue' (\$10,000.00) and 'Number of Employees' (6,200). A 'CLM' button is highlighted in the top navigation bar, and a 'Generate w/ CLM' button is highlighted in the top toolbar. A vertical toolbar on the right side of the main content area is also highlighted, containing icons for 'O ITEMS', 'Share', '+', 'Refresh', 'Search', 'Email', 'Print', 'Refresh', and 'Back'.

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Perform CLM Functions without Leaving Dynamics



breach of agreement involving the dissemination of confidential information, the Receiving Party or a third party, and will do everything possible to help the Disclosing Party regain possession of the confidential information.

START

The image displays two overlapping screenshots of the Dynamics 365 Sales Hub interface. The left screenshot shows a document form with fields for 'Signature', 'Name', 'Title', and 'Date'. The right screenshot shows the 'A. Datum Corporation' account details page, including a 'COMPANY PROFILE' section with fields for Industry, SIC Code, and Ownership, and a 'DocuSign Account Status' field set to 'Signed'.

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DocuSign CLM Connector



Master Contracts in Dynamics

Capitalize on enhanced contract lifecycle management achieved through the Microsoft Dynamics and DocuSign CLM Connector.

Get in touch for further assistance and support from Marshfield Consulting.

DocuSign CLM Connector for Microsoft Dynamics



Powerful Doc Generation

Build standard contracts using templates and data in Dynamics



Embedded CLM Interface

Folder Explorer on any page gives users access to contracts in context



Extendable CLM Platform

Configure robust end-to-end CLM features – now linked to Dynamics!

Marshfeld Consulting

DocuSign CLM Connector for Microsoft Dynamics



Contact Us:



Email Address
info@marshfieldconsulting.com



Office Address
3737 N. Marshfield Ave., Chicago, IL 60613



DocuSign CLM Connector for DocuSign CLM and Microsoft Dynamics