

Velosio®



HelloSign



Solution Details

Which Apps

D365 for Sales, Customer Service and Field Service

Industries

Horizontal solution that can be deployed for any industry

Price / Timeline

\$1,680 (services only)

3 days

Solution Details

Description

HelloSign integration with Dynamics 365 CRM is a low-cost solution that provides an effortless end user and customer eSignature experience to sign-off on documents or execute on contracts.

Scope Includes:

- Install and configure the HelloSign eSignature solution into client's Dynamics 365 CRM application
- Train Power Users how to:
 - Configure settings
 - Create templates
 - Create schedules
- Go-live support
- Deliverables:
 - 1 template
 - 1 schedule

Screenshot

City Power & Light
Account · Account

Summary Project Price Lists Details Field Service Scheduling Files **Related**

ACCOUNT INFORMATION

Account Name	City Power & Light
Phone	+1-785-555-1333
Fax	1-785-555-1334
Website	http://www.cpandl.c...
Parent Account	---
Ticker Symbol	CPLZ
Relationship Type	---

Timeline

Search timeline

Enter a note...

- Phone Call from M
Introduction phone call
Introduction phone call
Closed
- Phone Call from Ja
Followed up with custo
Followed up with custo
Closed
- Phone Call from Ve
Had a discussion with C
Had a discussion with C
Closed

Related - Project Service

- Quote Lines
- Orders
- Geofences
- Conversations
- Ongoing conversations (Deprecated)
- Invitations
- Managed Accounts
- Managed Contacts
- Web Roles
- Leads
- Opportunities

Assistant

No notifications or s
Check back later to see what's new

Primary Contact

CONTACTS

Chris Gallagher
chrissg@cpandl.com

Dynamics 365 Settings HelloSign Admin

Enable Server-Based SharePoint Integration Enable Now

NEW ACTIVITY NEW RECORD IMPORT DATA

HelloSign Configuration Configure HelloSign Templates **Create HelloSign Templates**

Create HelloSign Template

Upload Your File

Choose Files No file chosen

What roles need to sign?

Signing Role (Manager,Client,etc...) +

CcRoles

Cc Role (Manager,Client,etc...) +

REQ* FIELD LEFT 1 NEXT REQ*

DESCRIPTION	QTY	UNIT PRICE	TOTAL
Wireless Router	1		50
Samsung Monitor			80
HP Laptop			800

Remarks / Payment Instructions:

SUBTOTAL 930.00

DISCOUNT 0.00

SUBTOTAL LESS DISCOUNT 0.00

TAX RATE 0.00%

TOTAL TAX 93.00

SHIPPING/HANDLING 10.00

Click to sign *

10 / 22 / 2020