Explanation

The AssureSign integration within Dynamics 365 provides a robust interface friendly to most operating systems. Encompassing AssureSign's innate velocity, cost, and security benefits, our Dynamics integration offers an eSignature solution native to Microsoft's Dynamics 365. As with all AssureSign solutions, this synergic integration remains E-SIGN and UETA compliant while yielding automation of workflows, custom branding, increased productivity and efficiency, and versatility.

Available for both on-premises installation & CRM online

Facts

- Launch and send documents directly from standard or custom entities.
- Create branding, signing, and email standards to fit your business.
- Create custom processes to automate document sending without custom code.
- Use envelopes to send multiple documents to a single signer.
- Enable bulk sending to submit documents to multiple signers.
- Display signing links directly within Dynamics 365 for in-person signing.
- Update data in Dynamics 365 through AssureSign's DocumentTRAK web hooks.
- Configure workflows to trigger business events for completed documents.
- Conserve data use with various storing options, like our Sharepoint integration.

Additional Tools

The AssureSign-Dynamics 365 integration is supported within any pre-purchased Microsoft Dynamics 365 Software.

Customer Success

Captorra

innovatix

POWER OBJECTS
An **HCL** Company

United States Olympic Committee

BENEFITS

Improves productivity by supporting your entire workflow without leaving Dynamics 365

Increase speed of execution by eliminating manual processes

Track the entire signing process from start to finish

Simplify document management and audit trails

Microsoft
Silver Partner