Adobe Sign

Adobe Sign for Microsoft Dynamics 365.

Send, sign, track, and file contracts with e-signatures you trust.

Seal any deal quickly, easily, and securely with Adobe Sign, the preferred e-signature solution for Microsoft customers. The Adobe Sign integration for Microsoft Dynamics 365 speeds up sales cycles and reduces frustrating delays in the contract approval process. Send, track, and sign contracts—anywhere, anytime, on virtually any device—without leaving the Dynamics 365 application.

Adobe Sign helps your organization get to success faster.

⏱	Close more deals and get to revenue faster	$	Grow revenue using CRM
★	Improve customer experience across all touch points	🔒	Reduce business risks in contract processes
📱	Enable reps to close deals anywhere, on any device	🔍	Improve visibility of contract status
⚙	Help reps be more productive with CRM tools	⚒	Leverage powerful new tools that are easy to install and use

Speed time to revenue.

Compared to paper-based processes, Adobe Sign makes it easy to get deals signed more quickly and efficiently. The turnkey integration enables you to simply use your Dynamics 365 login credentials to access Adobe Sign and send out documents for signature, including from Microsoft SharePoint. Recipients can easily view and sign contracts in a few quick clicks, without downloading or installing any software or signing up for an account. And once signed, the Microsoft Dynamics 365 record is updated, and contracts are automatically saved as PDFs and sent to all parties. The entire process can happen in a matter of minutes.

Adobe Sign customers include:

- Ceridian
- CodeScience
- Diners Club
- Foursquare
- The Global Fund
- Groupon
- KLM
- NEC Financial Services
- NetApp, Inc
- Northstar Travel Media
- Ricoh UK
- Telefónica
- TiVo
- University of Georgia

Use Cases

Prospect	Develop	Close	Maintain	Renew
• New account/ customer application	• Non-disclosure agreement	• SOW/sales contract, insertion order	• New customer onboarding form	• Renewal agreement
	• Internal proposal/ quote approval	• Quote/proposal	• Change order	• Contract addendum
		• Financing application	• Project sign-off	
		• Loan/lease agreement	• Receipt of goods/services	
			• Services agreement	

Simplify approvals.

Nothing slows down a deal more than an inefficient approval process. Collecting signatures, logging change requests, and processing renewals can often be tedious for both you and your customers. But they don't have to be.

With Adobe Sign, you can enable anyone in your organization to quickly send documents for signature right from within Dynamics 365, whether they are on desktop or mobile. And your customers can easily sign from any device, no matter where they are. When you're out of the office, you can keep contracts moving by using Adobe Sign in the Dynamics 365 mobile app. And you can even use Adobe Sign with international customers thanks to global support for signing in all Dynamics 365 languages.

Increase visibility.

Adobe Sign for Microsoft Dynamics 365 makes it easy to set up and track the signature process, so you don't have to chase down paper or email to find out the status of your agreements:

- Monitor the progress of all Adobe Sign documents directly within Dynamics 365, so you always know what proposals, quotes, and contracts are out for signature and where they are in the approval cycle.
- Empower reps to know exactly when their documents have been opened, viewed, or signed.
- Gain real-time visibility into the contract cycle across your organization for better forecasting and more productive planning.

Mitigate risk.

Human error is a risk in any organization. It can be too easy to accidentally send an outdated version of a contract or mistype pricing on a quote. But by replacing manual processes with a 100% digital solution, you can minimize costly legal and business risks:

- Automatically add data from Dynamics 365 into contracts you send for signature—and even capture data from the signed agreement back into the customer record.
- Create workflows that follow your specified business rules to ensure the right information and the right documents are used every time.

Trusted and secure.

Adobe Sign supports digital signatures and e-signatures. And both types are are legally valid and enforceable in nearly every industrialized country around the world. Adobe Sign is fully compliant with all major international laws, as well as PCI DSS 3.0, HIPAA, SOC2 Type 2, and ISO 27001. And all Adobe Sign data and documents are encrypted both in motion and at rest.

- Reduce legal risk by maintaining a complete audit trail for every transaction.
- Rest assured your documents are tamper-proof thanks to a digital seal that ensures contract integrity.

A complete e-signature solution for Microsoft Dynamics 365.

Adobe has been a trusted leader and innovator in secure digital document technology for more than 20 years. That's why organizations of all sizes rely on Adobe Sign to accelerate their business. Adobe Sign works natively with both the online and on-premises versions of Microsoft Dynamics 365, so you can integrate it into your current Dynamics 365 document processes with no coding required. And your staff can manage their entire e-signature workflow without ever leaving Dynamics 365.

For more information about Adobe Sign for Microsoft Dynamics 365, visit www.adobe.com/go/sign-microsoft-dynamics.

Adobe Sign and Microsoft SharePoint.

Adobe Sign also provides an integrated solution for creating, sending, tracking, and managing signatures from within SharePoint. Seamlessly send SharePoint documents for signature from Adobe Sign or Microsoft Dynamics 365.

For more information, see Adobe Sign for Microsoft SharePoint at www.adobe.com/go/integration-sharepoint.