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Documents & eSignatures & Microsoft Dynamics CRM –
DocumentsCorePack combines it all!



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Introducing the eSignatures Integration with DocumentsCorePack

Paper-based processes are time consuming!

1. Create customer specific documents
2. Circulation & Revisions
3. Signing by you and your customers

Idea: „How do we make this simple?“

By integrating

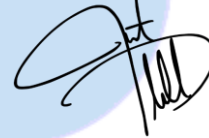
- Microsoft Dynamics CRM (data host)
- DocumentsCorePack document design, generation & processing
- DocuSign (eSignature provider)

Value: Save time and money!

- One-click action
- Automation possible



STATEMENT OF WORK (SOW)	
Environment	Agency/Department
User Base	# of Users for Component
Component 1	# of Users for Component
Component 2	# of Users for Component
Component 3	# of Users for Component
Total Number of Users	# of Users Total
Mailbox Type	#
Mailbox Resources	#
Mailbox Size	# of Mailboxes
Current Email System	# (OS)
Other Systems/Tools Related to Email	Short description
Mobile Users	#
Browser Users	#
Internet Explorer	
Firefox	



Application scenarios in daily (CRM) business

Anything that needs a signature:

- Contracts
- Non-disclosure-Agreements (NDA's)
- Statement of Work (SOW'S)
- Proposals
- PO's



Features:

- Template Design: Place eSignature Components
e.g. Signature location, initials, date-signed,...
- Support for multiple signees!
e.g. Document to be signed by customer and countersigned by internal employee

Demo Part 1: Defining eSignature fields in DCP Templates

Topics covered:

- Inserting DocuSign Fields into DCP Templates
 - Define signature location
 - Add flags for initials, date signed,...
- Defining & Assigning multiple Signees

Demo 2: Triggering an e-Signature process manually

Topics covered:

- Using the DCP Create Document Button to start the DocuSign Process from the CRM Command Bar

Demo Part 3: Signing & Counter-signing of documents

Topics covered:

- The post processing of the document using the DocuSign Solution

Roadmap

- Support other eSignature Providers
 - AssureSign
 - echoSign??
- UI enhancements in Template Designer
- Additional configuration options on Dialog
 - Preset fields for multiple signees

AssureSign



Thank You


Feel free to join our upcoming Webinars!


<http://www.mscrm-addons.com/Support/Webinars.aspx>

Resources:

- You can find us on the web at <http://www.mscrm-addons.com>
- Help-Center (Live-Chat, Support): <http://www.mscrm-addons.com/Support.aspx>
- Don't forget we have an awesome blog at <http://blogs.mscrm-addons.com/>, you'll find it to be a helpful resource!

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