



**mscrm-addons.com**  
Your company for MS-CRM ADD-ONS!

AssureSign and DocumentsCorePack:  
Professional e-Signature processing in  
Microsoft Dynamics 365

# Agenda

AssureSign & mscrm-addons.com

1

AssureSign: Benefits of Electronic  
Signature

2

DocumentsCorePack for Dynamics  
365 / CRM

3

DocumentsCorePack + AssureSign

4

Demo

5

Q&A



# AssureSign

## Benefits of Electronic Signature



### VELOCITY

Increase Sales Up To 65%



### COST REDUCTION

Cost Savings Up To 75%



### RISK MITIGATION

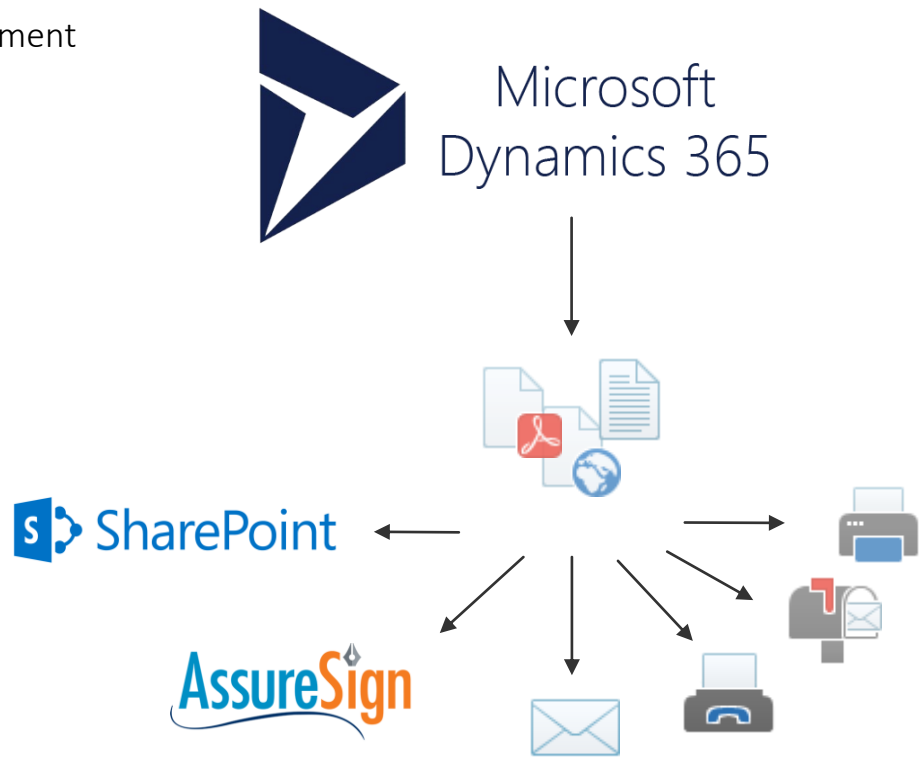
Achieve 100% completion rate

# DocumentsCorePack

## A unified document solution in MS Dynamics 365: How does it work?

3 major pillars guarantee flexible, professional and reliable document processing:

- The 'Dialog' – user guided document processes:  
Accessible from the command bar, the dialog eases document generation and processing to 3 simple steps:
  - Select a template
  - Choose a document action &
  - Preview
- Document Automation inside Workflows
  - Payment- / Shipping confirmations
  - Scheduled reports
  - Standardize documents
- TemplateDesign
  - Use the Power & Simplicity of Microsoft Word to design your reports.



# DocumentsCorePack & AssureSign

Simplify your business processes & save some trees

Goal: Streamline and unify process of document generation and e-Signing

- Template Design:
  - Pre-define placeholders for e-Signatures
  - Pre-define properties and questions
- Trigger e-Sign processes
  - Start an on-demand process via the DocumentsCorePack dialog
  - Full Automation via workflows
- Features:
  - Ability to track the signing process within MS Dynamics 365
  - Signed document delivered back as note
  - In-Person Signing capabilities

AssureSign



**mscrm-addons.com**  
Your company for MS-CRM ADD-ONS!

# Demo

1. Designing a NDA using the DocumentsCorePack Template Designer to add AssureSign Fields.
2. Sending the NDA to a customer using DocumentsCorePack and AssureSign in Dynamics365.

# 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!

## Contact:



US: +1 404 720 6066



support@mscrm-addons.com



Europe: +43 (316) 680 880



office@mscrm-addons.com



**mscrm-addons.com**  
Your company for MS-CRM ADD-ONS!