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

Simplify your Contract Processes
with
DocumentsCorePack & Dynamics 365

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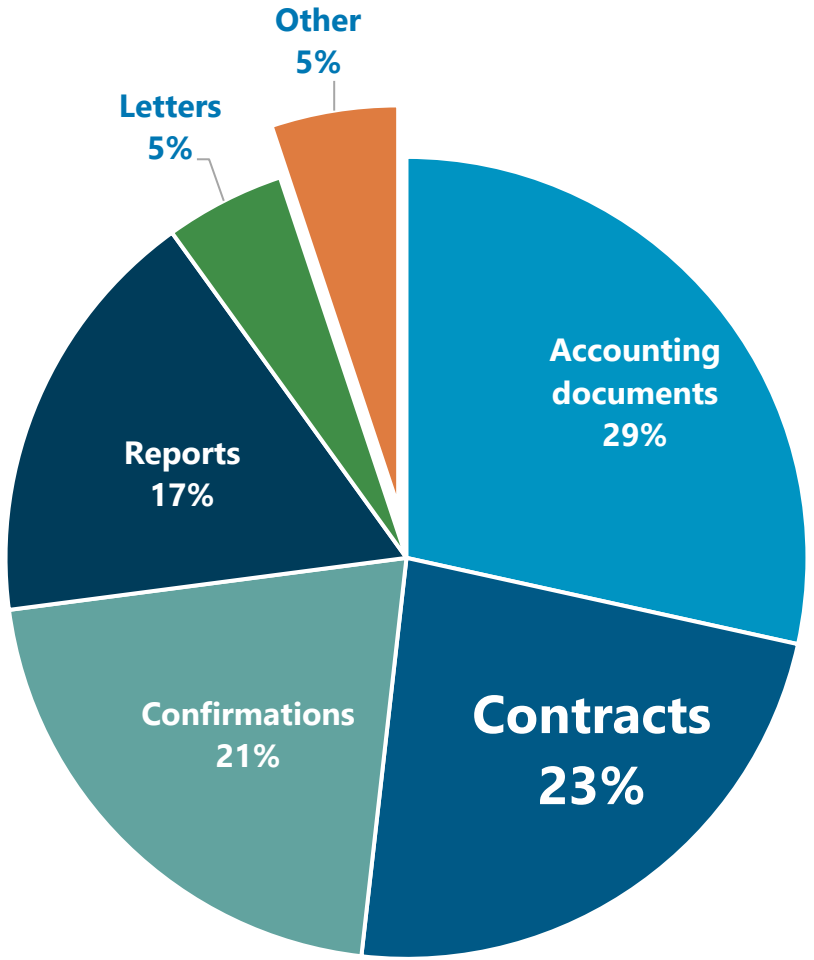
Contracts in Dynamics 365

Required across various modules: Sales, Field Service, Customer Service & Power Apps)

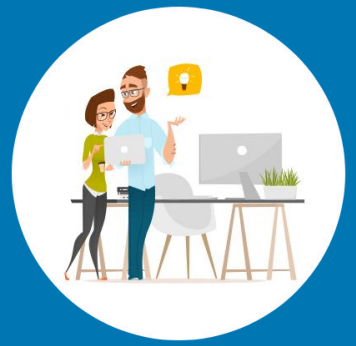
Examples from our customers:

- Proposals & Purchase agreements)
- Agreements (NDAs)
- HR documents (empl. contract)
- Leases
- Enrollments
- Donation receipts
- Work Orders,
- …

Types of documents generated



Source: mscrm-addons.com survey (2500+ customers)



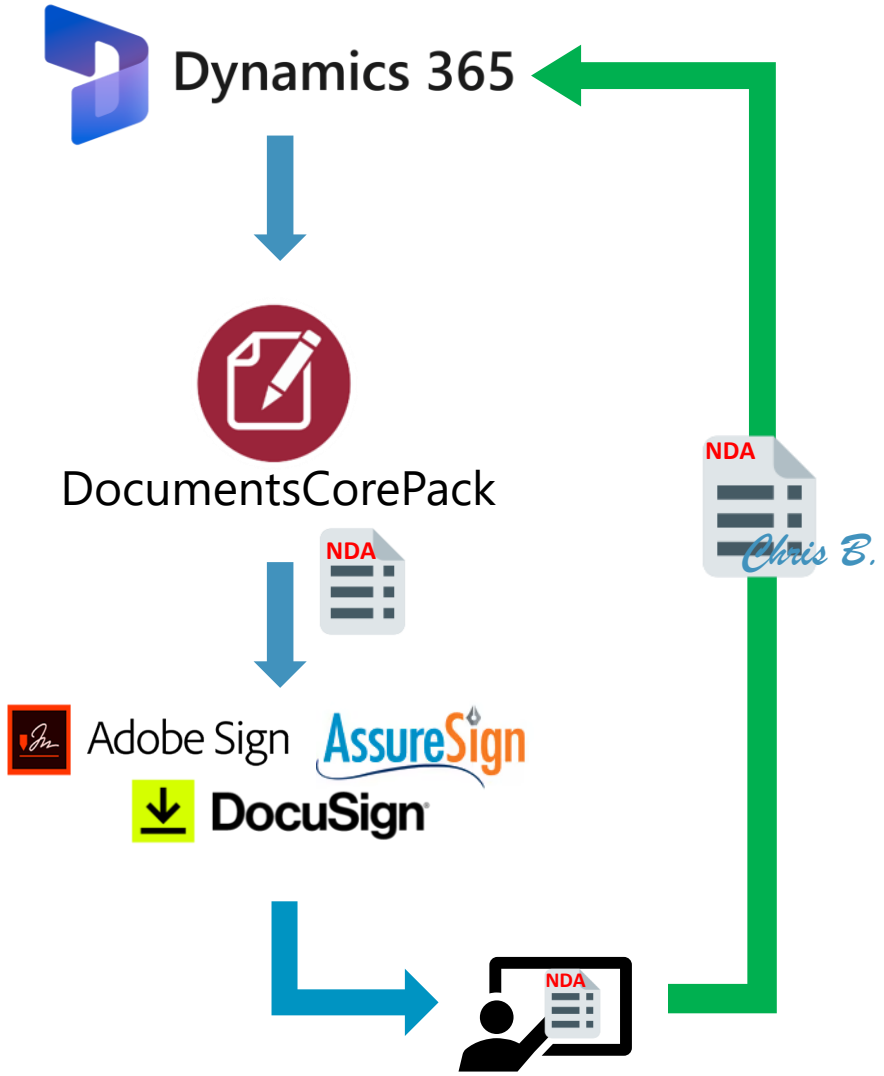
Supported Providers

- Adobe Sign
- DocuSign
- AssureSign (Nintex)

Benefits

- Eliminate manual steps and save time
- Increase efficiency through streamlined processes
- Improved Customer experience

DocumentsCorePack e-Signature Process: A closed loop



Dynamics 365:
- Data for contract
- Signed document stored at record

DocumentsCorePack:
1. Design Contract
   - Map business data
   - e-Signature tags
   - # of Signees

2. Create Contract:
   - Via Command-Bar Dialog
   - Via Power Automate

3. Start e-signature Process
   - Using D365 integration of e-sign Providers

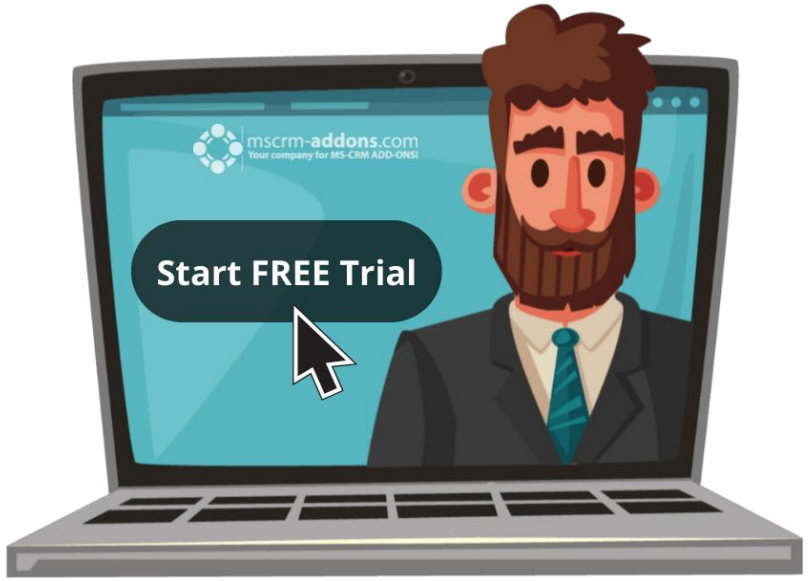
User:
- Sign document via native UI of e-Sign Provider

Live Demo:

- Prepare a contract in Word
- How to generate custom contracts with a single click
- How to automate contract generation Via a Flow

Free Trial

- **Free Trials Available** for all Add-Ons
- No functional limitations
- Fully supported
- ~30 minutes to get started



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