

SOLUTION BRIEF

Adobe Acrobat Sign for Microsoft Dynamics 365

Keep business moving with automated workflows and digital signatures.

When business workflows are interrupted by paper processes and manual tasks, they cause frustrating delays, poor customer experiences, and missed sales opportunities. Adobe Document Cloud—which includes [Adobe Acrobat Sign](#), [Adobe Acrobat](#), and [Adobe Scan](#)—helps you eliminate costly and inefficient paper processes.

Add Acrobat Sign to Microsoft Dynamics 365 Sales, Customer Service, or Field Service to speed up sales cycles, reduce contract approval time, and improve the customer experience with legally binding, globally compliant e-signatures and automated workflows. The Acrobat Sign add-in works seamlessly with Dynamics 365, so your teams can send, sign, and track contracts—no matter where they are located—without leaving Dynamics 365.

Close deals faster.

Acrobat Sign makes it easy to get deals signed quickly and efficiently.

- The turnkey integration enables your sales teams to simply use their Dynamics 365 login credentials to access Acrobat Sign and send out documents for signature, including from Microsoft SharePoint.
- No matter where they are, recipients can easily view and e-sign contracts with a click, tap, or swipe—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 takes minutes instead of hours or days.
- Plus, administrators can completely automate the sales process by embedding Acrobat Sign into multistep Microsoft Dynamics Sales workflows, such as configuring a workflow to automatically initiate onboarding once a contract is signed.

Benefits for organizations:

- Get to revenue faster and improve win rates.
- Deliver an all-digital customer experience.
- Gain visibility into each contract's signature status.
- Close deals anywhere, on any device.
- Maximize your Microsoft investment.
- Reduce costs associated with paper, printing, and storage.
- Reduce legal, security, and compliance risks.
- Minimize time-wasting administrative tasks.

Deliver 100% paperless signing experiences.

Nothing slows business more than inefficient deal approval processes. Collecting signatures, logging change requests, and processing renewals can often be tedious for both your sales team and your customers. But they don't have to be.

With Acrobat Sign, anyone in your organization can quickly send documents for signature right from Dynamics 365, no matter where they are working from. Send contracts to multiple recipients in any order required—including sequentially, in parallel, or in a hybrid order that enables two or more recipients to receive the contract simultaneously within a defined approval sequence.

Recipients can easily sign documents from any device with a click, tap, or swipe. When teams are working remotely, keep contracts moving with Dynamics 365 for phones or Dynamics 365 for tablets using Acrobat Sign integration with Sales Hub, which is built on the Unified Interface framework for optimal viewing on mobile devices. Plus, international customers can use Acrobat Sign in all Dynamics 365 languages.

Acrobat Sign also integrates with Dynamics 365 Field Service and Customer Service modules and supports the Unified Interface. Field workers can now obtain in-person e-signatures, digitizing what have been manual, paper-based workflows in the past. And integration with the Customer Service module enables new digital workflows such as signing a statement of work and its amendments, proof of execution of work, agreements, contracts, and executing document approvals. And the Unified Interface integration makes it easy to create web pages like "getting started" landing pages.

Get visibility into contract signature status from anywhere.

Acrobat Sign for Microsoft Dynamics 365 makes it easy to set up and track the signature process, so sales representatives can minimize time spent chasing down contract approvals or filtering through emails to find out the status of agreements:

- Monitor the progress of all Acrobat Sign documents directly from Dynamics 365, so your teams always know what proposals, quotes, and contracts are out for signature and where they are in the approval cycle.
- Empower sales representatives 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.

Use cases

Use cases: Acrobat Sign can be used across the entire customer relationship lifecycle, from prospecting to renewal.

Prospect

- New account/customer application

Develop

- Nondisclosure agreement
- Terms and conditions
- Internal proposal/quote approval

Close

- Sales contract
- Quote or proposal
- Financing application
- Loan/lease agreement

Maintain

- New customer onboarding form
- Change order
- Project sign-off
- Receipt of goods/services
- Services agreement

Renew

- Renewal agreement
- Contract addendum
- SOW or insertion order

“Our customers are getting a much more efficient, auditable, and professional experience than they did before, thanks to the integration between Microsoft Dynamics 365 and Acrobat Sign.”

Simon Drake

Senior Vice President and UK General Manager

Hitachi Solutions Europe, Ltd.

Reduce legal and compliance risks.

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. With Acrobat Sign, you can replace manual processes with a 100% digital solution, minimizing costly legal and business risks:

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

A complete e-signature solution for Microsoft Dynamics 365.

Acrobat Sign delivers everything you need to add powerful e-signature capabilities to Microsoft Dynamics 365. It accelerates the sales cycle and improves customer experience by turning manual approval processes into 100% digital workflows that enable anyone to send and sign documents from anywhere on any device. The Acrobat Sign add-in for Microsoft Dynamics 365 is a free download from the Microsoft AppSource online store. With a valid Acrobat Sign for enterprise license, the installation and configuration process for Dynamics 365 is fast and easy, with no coding required by your Dynamics 365 administrator.

For more information, visit www.adobe.com/go/sign-microsoft-dynamics.

Adobe Acrobat Sign and Microsoft SharePoint.

Acrobat Sign and Microsoft SharePoint integration helps businesses streamline document [workflows](#) and get agreements signed instantly. Send SharePoint documents for signature from within Acrobat Sign or Microsoft Dynamics 365.

For more information, visit www.adobe.com/go/integration-sharepoint.

Benefits sales organizations anticipate from digital document processes:*



Revenue

79% expect to maintain or increase revenues



Business growth

71% expect a greater ability to gain new customers



Customer experience

63% expect improved CX

*["Why Sales Teams Need Advanced Digital Document Capabilities To Meet Modern Buyer Needs,"](#) a Forrester Consulting Thought Leadership Spotlight commissioned by Adobe, December 2021.



Now, with Acrobat Sign integrated with Dynamics 365, our agents can populate a contract while they are on the phone, and press Send. The prospect can electronically sign while on the phone without any hold up."

Piran Scott

Divisional Finance Director
Lifetime Training

Adobe Document Cloud helps organizations get work done faster and more efficiently.†



30% faster
Average time to complete transaction



US\$21.5 million
Financial benefits in present value over three years



519% ROI
Over three years



US\$21.50 savings
Per transaction



48%+ efficiency gain
When integrated with Microsoft 365, Dynamics, SharePoint, and Teams



US\$1 million
Additional business annually from improved customer experiences

†"[The Total Economic Impact of Adobe Acrobat Sign](#)," a commissioned study conducted by Forrester Consulting on behalf of Adobe, January 2022.

Acrobat Sign and Microsoft Power Apps and Power Automate.

Quickly and securely automate business approvals and signature processes, and reduce IT costs by adding Acrobat Sign to your Power Apps using the Power Automate connector.

For more information, visit www.adobe.com/go/power-platform.

A platform that provides trust, security, and compliance.

As a trusted leader in digital documents, Adobe delivers 100% digital experiences in the cloud, from a flexible, global SaaS platform that helps customers reduce security risk and meet their compliance requirements. Acrobat and Acrobat Sign are certified compliant with rigorous industry and regulatory standards, including SOC 2 Type 2, ISO 27001, and FedRAMP Tailored. Acrobat Sign Solutions is PCI DSS certified for the Payment Card Industry and can be configured to support compliance with HIPAA and FDA 21 CFR Part 11. Both Acrobat and Acrobat Sign can also be configured to support compliance with industry-specific regulatory requirements, such as FERPA and GLBA. For the current list of Adobe certifications, standards, and regulations, visit www.adobe.com/trust/compliance/compliance-list.html. Certain compliance capabilities may require purchase of specific product offerings or subscription plans.

About Adobe Document Cloud.

Adobe Document Cloud provides an integrated set of apps and services, including Adobe Acrobat, Adobe Acrobat Sign, Adobe Scan, prebuilt integrations, and robust APIs, that accelerate business and improve end-to-end employee and customer experiences by enabling secure, compliant, and automated digital document and e-signature workflows.

For more information or to start a free trial, visit www.adobe.com/go/dynamics-sign-trial or call 1-855-914-2747 in North America.



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