

SOLUTION BRIEF

Adobe 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 Sign](#), [Adobe Acrobat DC](#), and [Adobe Scan](#)—helps you eliminate costly and inefficient paper processes.

Add Adobe 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 Adobe 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. Adobe Sign is Microsoft's preferred e-signature solution.

Close deals faster.

Adobe 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 Adobe 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 Adobe 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 Adobe 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 Adobe Sign integration with Sales Hub, which is built on the Unified Interface framework for optimal viewing on mobile devices. Plus, international customers can use Adobe Sign in all Dynamics 365 languages.

Adobe Sign also integrates with Dynamics 365 Field Service and Customer Service modules and supports the new 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.

Adobe 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 Adobe 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: Adobe 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 Adobe 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 Adobe 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.

Adobe 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 Adobe Sign add-in for Microsoft Dynamics 365 is a free download from the Microsoft AppSource online store. With a valid Adobe 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 Sign and Microsoft SharePoint.

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

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

Sales organizations using e-signatures:*



Lower costs

65% more likely to see lower acquisition costs



Grow revenue

60% greater rate year-over-year

*"E-signature & Integrated Sales Technologies: Accelerating Success for Businesses & Buyers in 2019," Aberdeen, August 2019



Now, with Adobe 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.†



28x faster
Average time to
get signature



**US\$9.1 million in
total savings**
Increased revenue
and cost savings
over three years



420% ROI
Less than three
months



US\$6 and 1.5 hours
per transaction
Savings per user



65 hours/year
Savings per
Acrobat Pro DC
user



33 hours/year
Savings per
Acrobat Standard
DC user

† [Adobe Document Cloud & Microsoft 365: Improving Digital Experiences and Driving Significant Savings](#), a commissioned study by Forrester Consulting on behalf of Adobe, September 2019.

Adobe Sign and Microsoft Power Apps and Power Automate.

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

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

A trusted and secure platform.

Adobe Sign supports digital signatures, including e-signatures, certified signatures, and cloud signatures. All signature types are legally valid and enforceable in nearly every industrialized country around the world. Adobe Sign meets the most rigorous global regulations and standards including ISO 27001:2013, SOC 2 Type 2, PCI DSS V3.2.1, FDA 21 CFR Part 11, HIPAA-ready, GLBA-Ready, FERPA-Ready, and FedRAMP Tailored. And all Adobe Sign data and documents are encrypted both in motion and at rest.

For the current list of Adobe certifications, standards, and regulations, visit www.adobe.com/go/security-and-compliance.

Work with the digital document leader.

Adobe invented PDF more than 25 years ago and is the global leader in secure digital documents—with Adobe Sign and Acrobat powering employee and customer experiences for more than 75% of the Fortune 100. Adobe Document Cloud delivers 100% paperless processes to keep business moving—even for remote workforces and global offices. The result is exceptional customer experiences, improved business efficiency, and unparalleled productivity.

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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