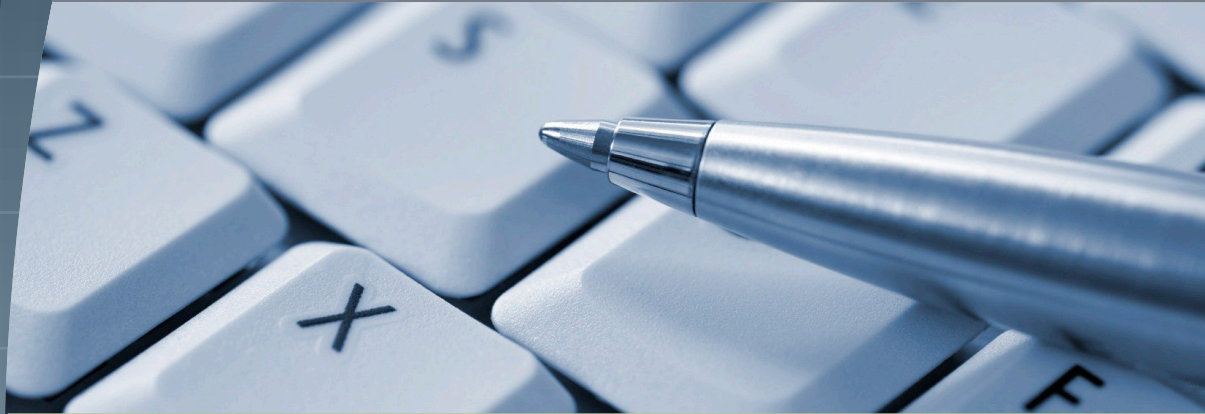




## eSign365 for Microsoft Dynamics CRM

Merge your Dynamics CRM data with documents stored in SharePoint and send out for a client signature with one click.



### Key Benefits

- » Easy to install and set up. No training is required.
- » Shorten the sales cycle and accelerate the revenue by sending quotes for electronic signature approval.
- » Track the status of your deals in Dynamics CRM. You will have more insight into your deals than before.
- » Collect data in your documents and automatically update Dynamics CRM when the deal is done.
- » Request additional documents from the signers such as a copy of a driver's license, W-2 or other required documents.
- » Compatible with Microsoft Dynamics CRM 4.0 and 2011, on-premise and online versions

eSign365 has been designed to seamlessly integrate with Microsoft Dynamics CRM versions 4.0 and 2011 to enable businesses to electronically send, sign, and manage documents with confidence. Dynamics CRM users can shorten the sales cycle and accelerate the revenue by sending quotes and orders for electronic signature approval using a sophisticated user interface.

### Get Started in Minutes

Easy to install and set up. No training is required — sending documents for electronic signature is as easy as sending an email. Simply route the document to one or many email destinations using your Dynamics CRM Lead, Contact, and User records.

### Rich Functionality

Employ transaction control, workflows, templates, user management, reporting and more. Merge the Dynamics CRM data with SharePoint documents for one-click electronic signature initiation. Collect data in your documents and automatically update Dynamics CRM when the deal is done. Anytime, anywhere signing with a Web browser — even on a mobile device.

### Complete Visibility and Control

Quickly view status and progress of your sales process using Dynamics CRM reporting or entity explorer. Know exactly when your deal is delivered, know when it's opened, know when it's signed, and know when your deal is closed - without ever leaving the Dynamics CRM interface.

### Request Signer Attachments

Dynamics CRM users can now request additional documentation from their signers such as a copy of a driver's license, W-2 or other required documents. Signer provided attachments are securely archived in a SharePoint document library.



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“True innovation on time...  
and on budget”

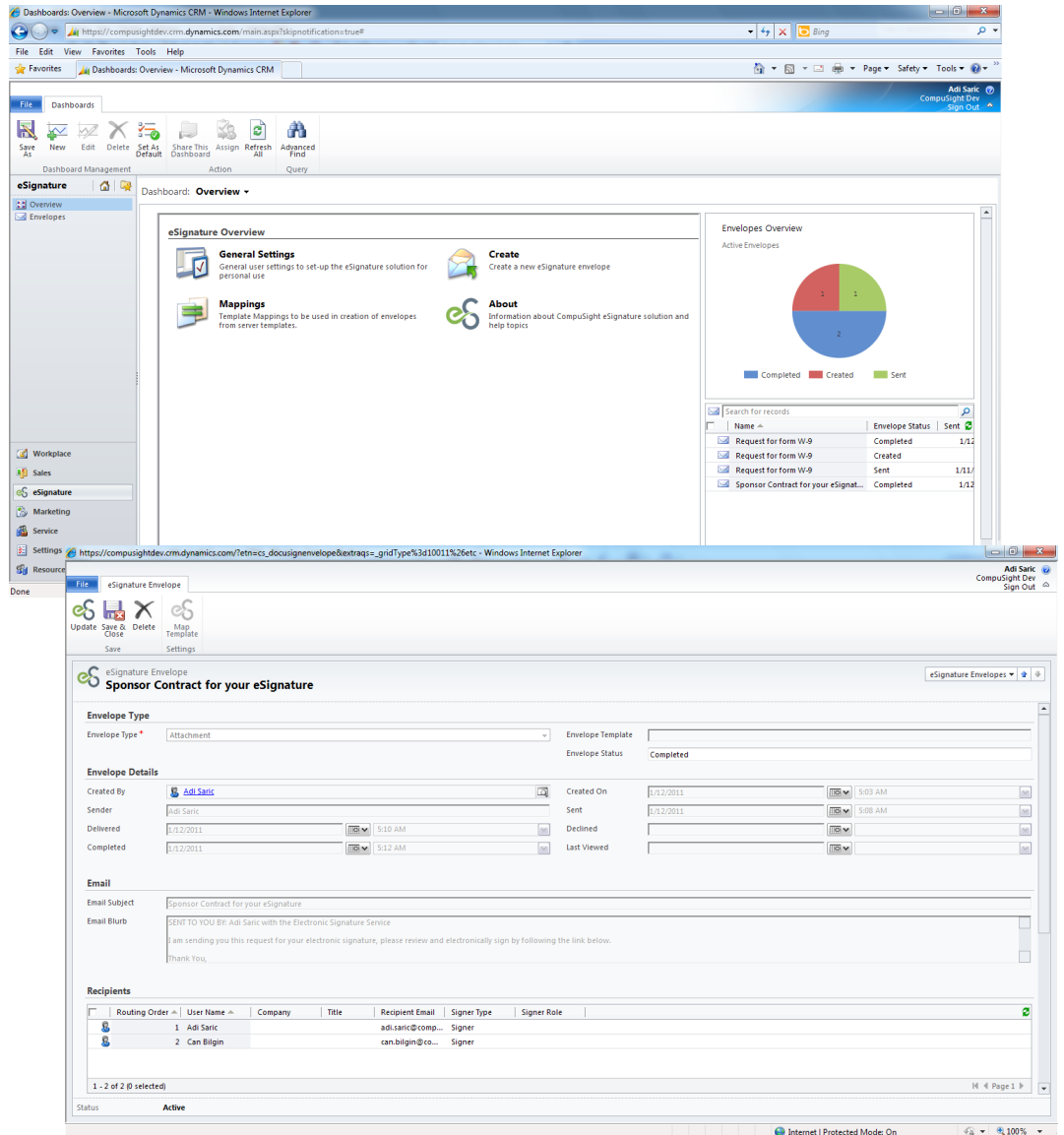
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The screenshot displays the eSign365 interface within a Microsoft Dynamics CRM environment. The top section shows the 'eSignature Overview' dashboard with options for General Settings, Mappings, Create, and About. A pie chart indicates the status of envelopes: 1 Completed, 1 Created, and 2 Sent. Below the dashboard is a table of active envelopes:

Name	Envelope Status	Sent
Request for form W-9	Completed	1/12
Request for form W-9	Created	
Request for form W-9	Sent	1/11
Sponsor Contract for your eSignat...	Completed	1/12

The bottom section shows a detailed view of an 'eSignature Envelope' for a 'Sponsor Contract for your eSignature'. The envelope type is 'Attachment' and the status is 'Completed'. The details include:

- Envelope Type:** Attachment, Envelope Template: [blank], Envelope Status: Completed
- Envelope Details:**
  - Created By: Adi Saric
  - Created On: 1/12/2011 5:03 AM
  - Sender: Adi Saric
  - Sent: 1/12/2011 5:08 AM
  - Delivered: 1/12/2011 5:10 AM
  - Declined: [blank]
  - Completed: 1/12/2011 5:12 AM
  - Last Viewed: [blank]
- Email:**
  - Email Subject: Sponsor Contract for your eSignature
  - Email Blurb: SENT TO YOU BY: Adi Saric with the Electronic Signature Service. I am sending you this request for your electronic signature, please review and electronically sign by following the link below. Thank You.
- Recipients:**

Routing Order	User Name	Company	Title	Recipient Email	Signer Type	Signer Role
1	Adi Saric	adi.saric@comp...		adi.saric@comp...	Signer	
2	Can Bilgin	can.bilgin@co...		can.bilgin@co...	Signer	

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