

DocuSign with D365 CRM



Manual document workflows and slow approvals are hindering your business growth? Our solution seamlessly integrates DocuSign with Dynamics 365 to help you achieve:



Boost Efficiency



Enhance Collaboration



Reduce Errors

Features

- Workflow Automation**
Automate document approval processes in Dynamics 365 CRM with Power Automate.
- Document Tracking and Visibility**
Track document status in real-time to monitor approval and signature progress.
- Security and Compliance Assurance**
Ensure document security and compliance with DocuSign's authentication and encryption features.
- Mobile Accessibility**
Manage document workflows on the go with mobile-friendly solutions.
- Version Control and Audit Trails**
Maintain document version control and create audit trails for accountability and compliance.
- Dynamic Data Mapping**
Map and transfer data between Dynamics 365 CRM and DocuSign.
- Automated Reminders**
Implement automated reminders for pending approvals.
- Template Management**
Generate standardized documents with template management.

Our Technology Stack



Dynamics 365 CRM



Power Automate

Our Impact in Numbers

350+ Masterminds	100+ Clients Worldwide	150+ Dynamics 365 Projects	98% Client Retention Rate
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