



OneSpan Sign for Dynamics CRM Datasheet

Send, sign and track your contracts without ever leaving your CRM with OneSpan Sign for Dynamics CRM. Choose the most secure, intuitive and fast way to add e-signatures to your documents in the cloud

HIGHLIGHTS

Get up and running with e-signatures in minutes with little to no IT involvement at all and customize your application based on your business requirements

- Drag & drop signature blocks and fields into documents
- Select documents to upload from Dynamics CRM, SharePoint or from your desktop
- Invite prospects and customers to e-sign from your contacts, leads and users
- Support for standard and custom entities to autopopulate documents with data from Dynamics CRM
- Track the progress of the digital transaction as well as the signing process
- Automatically archive e-signed documents in your CRM
- Use and save templates to automate future transactions

- e-Signed documents include embedded audit trails and tamper-evident signatures that record who signed, in what order, when and where

OneSpan Sign for Microsoft Dynamics CRM is an add-on that enables sales and marketing professionals to prepare, manage and send documents for e-signature directly from their CRM system. Recipients can conveniently review and sign documents from anywhere, anytime and on any device. By ensuring that the process stays 100% digital, you eliminate manual processing and related errors and costs, ultimately helping you close deals faster.

OneSpan Sign for Dynamics CRM handles many different scenarios, including:

- Managing multiple documents and signers with serial or parallel signing processes
- Applying an additional layer of security with authentication methods like email, SMS text code and Q&A
- Implementing built-in reminders and expiration dates
- Remote or in-person signing
- Customizing the signer experience across any channel and any device, including mobile

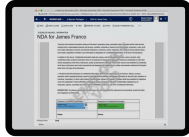
One Span Sign can also integrate with Xpertdoc to automate the entire document transaction lifecycle - from document generation to e-signature - directly from Dynamics CRM.



Add e-signatures to everyday documents, such as:

- Sales contracts
- Purchase orders
- Statements of work
- Partner agreements
- SLAs
- NDAs
- Customer PR approvals

. Insertion orders



HOW IT WORKS

Most flexible solution

Upload documents, add signers and choose other e-signature options to create your eSignLive transaction.

Prepare & Send

Drag & drop signature blocks and fields into your documents and send the prepared documents to prospects, customers and partners to e-sign.

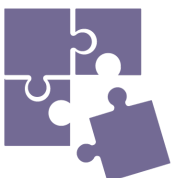
Most flexible solution

Signers receive an email inviting them to e-sign documents. They authenticate themselves, gain access to the documents and click to sign.

Track

Monitor the progress of your eSignLive transaction in real time and view the automatically archived e-signed documents and the audit trail without leaving your CRM.

PRODUCT DIFFERENTIATORS



Most flexible solution

Most deployment options: public cloud, private cloud or on-premises behind the firewall (for any project size, complexity or budget)

Configurable workflows and a wide range of user authentication options and signature capture methods



Highest adoption rates

Fully white-label the e-sign process and deliver the best signer experience — from simple to the most complex workflows

Ease of use across channels and devices from 20+ years of best practices



Most comprehensive audit trails

Static and patented visual audit trails make it easy to demonstrate compliance and prove exactly what was signed and how it was signed



Secure, legal, and compliant

Tamper-evident seal for each signature

One-click, vendor-independent verification of signatures

OneSpan Sign meets the highest security standards including SOC 2, FedRAMP and HIPAA



OneSpan, the digital agreements security company™, helps organizations accelerate digital transformations by enabling secure, compliant, and refreshingly easy customer agreements and transaction experiences. Organizations requiring high assurance security, including the integrity of end-users and the fidelity of transaction records behind every agreement, choose OneSpan to simplify and secure business processes with their partners and customers. Trusted by global blue-chip enterprises, including more than 60% of the world's largest 100 banks, OneSpan processes millions of digital agreements and billions of transactions in 100+ countries annually.

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