

Dynamics CRM Connector for e-Signing Product

Project:

Dynamics Connector for e-Signing Product

Business Industry:

Information Technology

Duration:

5 man months

Technology:

Microsoft Dynamics CRM 2011/2013

Associated Partner:

IRIS Software Pvt. Ltd.

(www.irissoftware.com)

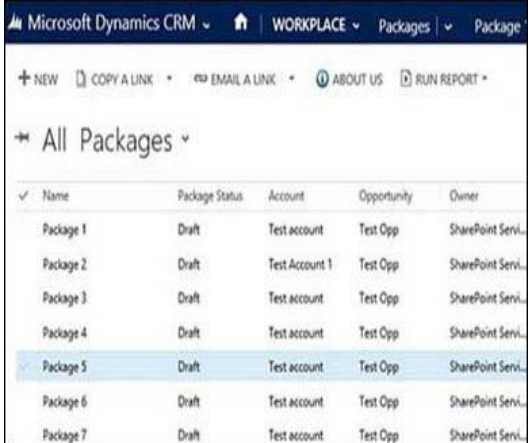
Problem Background

The client is a provider of e-signing solutions to different industry domains. The client needed a Microsoft Dynamics CRM connector for their e-signing solution. As many organizations are using Microsoft Dynamics CRM as a CRM solution they require to use the e-signing solution from within Dynamics CRM so that a user need not go outside the Dynamics CRM environment when e-signing documents. As a result the client decided to implement e-signing connector solution for Microsoft Dynamics CRM.

TechPerspect's Solution

TechPerspect created a Dynamics CRM connector for the e-signing solution of the client. The connector helps a user to create packages and e-sign document(s) from within Dynamics CRM. A user can also view the status of his/her created package from within the Dynamics CRM environment itself. E-signed document includes embedded audit trails and tamper-evident signatures, and are automatically archived in Microsoft Dynamics CRM for future reference with the following functions:

- Proper record keeping for signatures
- Coordinating signatures from multiple people on a single document
- Keeping track of the entire e-sign process
- Detailed management reports for the different packages that need to be e-signed



The screenshot shows the Microsoft Dynamics CRM interface for the 'All Packages' view. The table lists seven packages, all in 'Draft' status, associated with 'Test account' and 'Test Opp'.

Name	Package Status	Account	Opportunity	Owner
Package 1	Draft	Test account	Test Opp	SharePoint Servi...
Package 2	Draft	Test Account 1	Test Opp	SharePoint Servi...
Package 3	Draft	Test account	Test Opp	SharePoint Servi...
Package 4	Draft	Test account	Test Opp	SharePoint Servi...
Package 5	Draft	Test account	Test Opp	SharePoint Servi...
Package 6	Draft	Test account	Test Opp	SharePoint Servi...
Package 7	Draft	Test account	Test Opp	SharePoint Servi...

Solution Features

- Multiple signers and authentication methods
- Built in reminders and expiration dates
- Serial and parallel signing
- Multiple documents and authentication methods
- Online and in-person signing
- Integration with Microsoft SharePoint

Business Impact

- Productivity gains as the users can create packages and get them signed from within Microsoft Dynamics CRM
- Providing better user experience ensuring that contracts get signed in a timely manner
- Tracking of packages from within the same application
- Intuitive UI and features merged within Microsoft Dynamics CRM

Client Speaks

"I really like e-signing documents from Dynamics CRM itself. I can track the process and see detailed reports on the efficiency of the solution from within Dynamics CRM itself"

TECHPERSPECT SOFTWARE PVT. LTD.

Corporate Address: B – 14, Sector – 67,
Noida, Uttar Pradesh, India
www.techperspect.com
consult@techperspect.com
+91-120-2484404/05/06