# OneSpan

## 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 auto-populate 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 DYNAMICS CRM

**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.**

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.

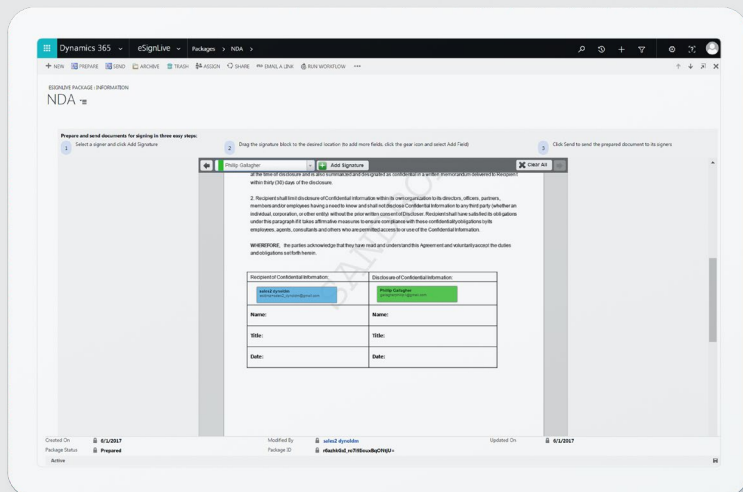OneSpan Sign for Dynamics CRM handles many different scenarios, including:

- 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.



## OneSpan Sign | Microsoft 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

Available for Microsoft Dynamics CRM 365 and 2016.

## 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

**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

**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

**Secure, legal and compliant**
Tamper-evident seal for each signature

One-click, vendor-independent verification of signatures

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

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## OneSpan

OneSpan enables financial institutions and other organizations to succeed by making bold advances in their digital transformation. We do this by establishing trust in people's identities, the devices they use, and the transactions that shape their lives. We believe that this is the foundation of enhanced business enablement and growth. More than 10,000 customers, including over half of the top 100 global banks, rely on OneSpan solutions to protect their most important relationships and business processes. From digital onboarding to f raud mitigation to workflow management, OneSpan's unified, open platform reduces costs, accelerates customer acquisition, and increases customer satisfaction.

**CONTACT US**
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