Sales Agreement Scenario

DocuSign + Microsoft Integrations
Sales agreement user journey

Agreement generation
- Seller communicates with customer via email to generate NDA
- NDA signed and stored in CRM

Review & Negotiation
- Customer interested; Seller generates proposal
- Customer and seller negotiate on terms
- Sellers VP approves final order form

eSign, Storage & Analytics
- Customer verifies Identity & signs; Seller is notified
- DS archives docs & triggers provisioning

Tools:
- Outlook, Dynamics
- Teams
- Dynamics, SharePoint, Power Automate
- CLM
- eSignature
- eSignature
Reference architecture

1. Create Templates with connected data models
2. Sign Email Attachments
3. Status Notifications
4. Send Agreements for Signature
5. Send Agreements for Signature
6. Agreement Data for Analytics and Reporting

DocuSign Platform
- Document Generation
- CLM
- eSignature
- Webforms
- Identity

DocuSign APIs

Customers
- Seller Business Applications
  - System of Engagement
  - Sales CoPilot
- System of Record
  - Azure Data Factory or Power BI

Sales scenario

Order Forms, RFPs
- Automated Envelope Sending
- Post-signing processes

Power Apps
- DocuSign for Dynamics 365
- DocuSign for Power Automate

Power Apps
- Send Agreements for Signature
- Sales Order, Statement of Work, Contract Renewal

Send Agreements for Signature
- DocuSign for Outlook
- DocuSign for Teams

Send Agreements for Signature
- Create Envelopes Data Merging Workflow Automation

Create Envelopes Data Merging Workflow Automation
- Create Templates with connected data models

Agreement Data for Analytics and Reporting