Customer/Vendor/Partner Onboarding Scenario
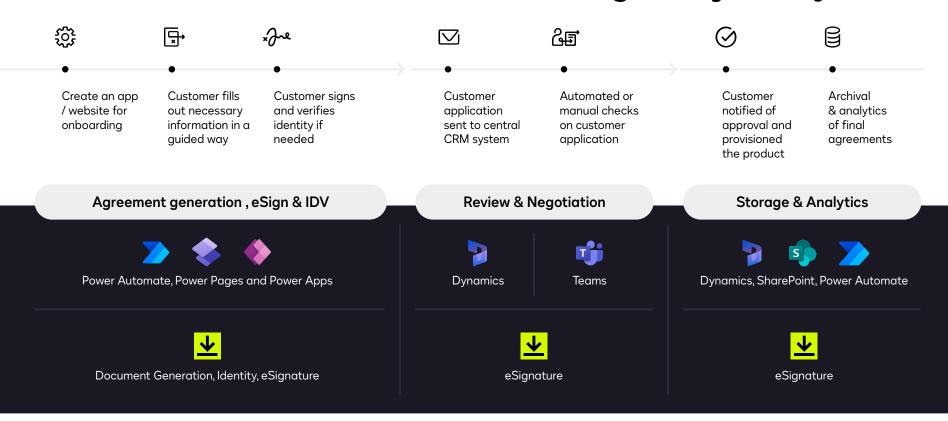
DocuSign + Microsoft Integrations

DocuSign®

Customer/Vendor/Partner onboarding user journey

Create an app / website for onboarding	Customer fills out necessary information in a guided way	Customer signs and verifies identity if needed	Customer application sent to central CRM system	Automated or manual checks on customer application	Customer notified of approval and provisioned the product	Archival & analytics of final agreements

Agreement generation , eSign & IDV

Power Automate, Power Pages and Power Apps

Document Generation, Identity, eSignature

Review & Negotiation

Dynamics

Teams

eSignature

Storage & Analytics

Dynamics, SharePoint, Power Automate

eSignature

Reference architecture customer onboarding scenario

Customer completes application process

Customer onboarding website or application

Power Pages

Power Apps

Custom Developed

Embed DocuSign capabilities in your website or app

Power Automate

1 Out of box DocuSign connector in Power Automate

2 Embed using DocuSign APIs

Document Generation	Identity	eSignature

3

Customer completed application is sent to CRM and collaboration tools for review

Agreement review

CRM and collaboration apps

Dynamics

Teams

4 eSignature for Dynamics

5 eSignature for Teams

Out of box DocuSign apps

eSignature	CLM

Agreement storage and analytics

Storage apps

Dynamics

SharePoint

6 eSignature for Dynamics & SharePoint

7 eSignature for Power Automate

Out of box DocuSign apps or DocuSign connector in PA

eSignature

DocuSign Agreement Data Model / DocuSign APIs

8 Agreement data for analytics

Azure Data Factory or Power BI

DocuSign