ApproveIT 365

Sign, store and automate follow-up on your Microsoft Dynamics 365 Business Central Sales Quotes & Orders with ApproveIT 365.

Control your signed sales quotes and easy follow up outstanding quotes.

Store your approved/signed documents digitally in Business Central.

All your sales information available in Business Central.

Optimize your contract process in Business Central with ApproveIT 365

Do you also spend a lot of time on the management of sales documents and the sales approval flow? Skip the hassle of the outdated process where your customers manually sign now and use ApproveIT 365 to securely run your sales approval process with DocuSign directly from Business Central. ApproveIT 365 integrates Dynamics 365 Business Central with DocuSign. Promote your sales documents to DocuSign for (secure) approval. After the e-signatures are received, ApproveIT 365 initiates the follow-up process in Business Central. Signed documents are automatically stored in Business Central.

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ApproveIT 365

Optimize your Sales Quote & Order process

Why should you use Approve IT 365?

Let your customers digitally sign your sales documents.

Sales Quotes are automatically converted into orders and accompanying processes are initiated when digitally signed in DocuSign.

Approved documents are stored with customer signature in Business Central.

Secure for all signing parties.

PDF

Create quote and submit to DocuSign

Approve quotes in DocuSign

Store signed quotes in Business Central

Transform quote to order in Business Central

Follow these steps:

1. Create a Sales Quote or Sales Order in Business Central.

2. Promote this Sales Order, quote or Order Confirmation to DocuSign using ApproveIT 365.

3. Your customer/prospect reads and then e-signs the invoice directly per e-mail.

4. When your customer/prospect has signed the document ApproveIT 365 (automatically) converts this Sales Quote into a signed order and releases the order to the accompanying process in Business Central (e.g., starting production, order picking, prepping orders, extending services).

At idyn we are specialised in the development of integration add-ons for Microsoft Dynamics NAV and Microsoft Dynamics 365 Business Central. These applications focus on three target groups: NAV/Business Central users, developers and our partners.

Do you want more advice or information?

Contact sales@idyn.nl or visit www.idyn.nl

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