



ApproveIT 365

Simplify Approving



Sign, store, and automate follow-up of your documents in Business Central with ApproveIT 365.

Simplifying document approval with ApproveIT 365

Seamless DocuSign integration: sign, store, and automate document follow-up in Business Central with ApproveIT 365.

ApproveIT 365 allows you to sign, store, and automate follow-up actions for purchase, sales, service, project documents, and contracts in Microsoft Business Central. Streamline your approval process with suppliers, vendors, customers, and applicants. Easily manage signed documents and track outstanding ones while storing everything in Business Central or Azure Storage.

Simplify the approval process with ApproveIT 365

Tired of managing manual document approvals? ApproveIT 365 integrates DocuSign with Business Central for secure, automated document approvals. Once e-signatures are received, follow-up actions in Business Central are processed automatically and you can start your own designed workflow. Signed documents are securely stored.

How ApproveIT 365 enhances the approval process:

- Instantly send a document via DocuSign – no more saving PDFs, creating emails, and attaching files. Just click 'Start ApproveIT flow' from your document (e.g., a sales quote), customize recipients, email text, and attachments if needed, and you're ready to go!
- Simplified digital signatures: customers, suppliers, and applicants can easily e-sign documents, eliminating manual signatures.
- Automated process: once signed, any workflow can be initiated.
- When the recipient has received and opened the email, you can see this in Business Central.
- Secure storage: signed documents are stored digitally with customer signatures in Business Central or Azure Storage.



ELEVATING 3,500 BUSINESSES WORLDWIDE THROUGH SMART APPS FOR BUSINESS CENTRAL

Keeping on track with the quotes & contracts you've sent to your prospects will no longer be a time-consuming process

Sign, store, and automate document follow-up in Business Central with ApproveIT 365.

Tracking quotes, contracts, and any other BC documents sent to your business partners is no longer a time-consuming process. ApproveIT 365 sends documents to your business partners via DocuSign, retrieves signed documents into Business Central or Azure Storage, and allows you to track the signing process in BC.

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Expanded functionality beyond sales documents

When ApproveIT 365 was first introduced, its main focus was managing signatures for sales quotes. However, the solution has since expanded to automate a wide range of document types, simplifying contract management and ensuring a more versatile and efficient workflow. ApproveIT now supports:

- Sales documents
- Purchase documents
- Service documents
- Job documents and contracts

It is also possible to use ApproveIT on non-standard BC documents. The app is designed to work with custom or app solutions in combination with ApproveIT 365.

Simplify approvals with idyn

ApproveIT 365 is available in English, Dutch, French, and German.

Steps to simplify your sales workflow:

1. **Create a Sales Quote or Sales Order in Business Central.**
2. **Use ApproveIT 365 to promote the document to DocuSign for secure digital approval.**
3. **Your customer/prospect receives the document via email, reviews it, and signs it electronically.**
4. **Once signed, ApproveIT 365 automatically converts the Sales Quote into a signed order, initiating the appropriate processes in Business Central, such as starting production, order fulfillment, or extending services.**



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