Docusign Anything

for D365 Business Central



onpoint

Docusign Anything connects Business Central with the Docusign electronic signature platform, allowing you to send documents for signature directly from Business Central.

Once sent, signed documents are automatically stored and linked to the right records. Whether you're handling sales documents, HR forms, or project-related paperwork, Docusign Anything makes the process simpler and more efficient. You can customize emails, involve multiple signers, and use it with or without a Docusign subscription. It's a straightforward and efficient way to handle all your document signing needs.



Why Docusign Anything Stands Out?

1 The Only Truly Universal Solution

Docusign Anything lets you send any document for signature directly from Business Central. Whether it's sales contracts, HR forms, project files, or custom reports, there are no restrictions. If you need it signed, we've got you covered.

2 Flexibility Without Limits

No Docusign account? No problem. Unlike other solutions, Docusign Anything works with or without a subscription. Plus, we offer exclusive partner pricing on envelopes, so you can save money while staying productive.

3 Built in Partnership with Docusign

Our integration goes beyond compatibility—it's a collaboration. Developed alongside Docusign's own experts, this solution ensures seamless functionality within Business Central. The result? A reliable and refined experience backed by the industry leader in electronic signatures.

4 Simplify Bulk Sending

Save time by sending multiple documents in one go. Docusign Anything is the only solution that allows you to bulk-send documents directly from Business Central. Currently perfect for HR processes, and we're already working to expand it for client-facing workflows.

Who Can Use Docusign Anything?

Docusign Anything is suited for any business using Microsoft Dynamics 365 Business Central that needs to manage document signatures.

Sales teams can handle orders and invoices, **HR** can manage employment agreements, and **finance teams** can process receivables due and payment schedules. **Project departments** can oversee timesheets , and **operations teams** can sign off on production-related paperwork.

If you use Business Central, Docusign Anything simplifies your document signing process.



What Docusign Anything Offers



Flexible Integration



Customizable Email Templates



Preconfigured Documents



Bulk Sending



Support for Multiple Signers



Precise Signature Placement



Docusign Queue Management



Easy Setup and Free Demo

Take a closer look.

Flexible Integration

Whether you already have a Docusign subscription or not, Docusign Anything adapts to your needs. If you're subscribed, your signature envelopes consumed through our solution will simply be added to your existing setup. If not, we offer signature envelopes at a special partner price, ensuring you have everything you need.

Customizable Email Templates

Tailor the emails that accompany your documents to fit different needs. You can create a universal template for all document types or customize the subject and content for each type individually, allowing you to send personalized messages to employees, customers, or other recipients.

Preconfigured Documents

We've made it easy to set up the most commonly signed documents – such as sales offers, orders, and invoices – with just one click. For other types of documents, our product documentation guides you through the process, and our team is available to assist during setup.

There's even more.

Bulk Sending

When you need to send the same document to a large group, such as employment contracts for new hires, our bulk sending feature allows you to do so with just one action, saving time and effort.

Support for Multiple Signers

For documents requiring signatures from multiple people, such as an employee and a company director, you can prepare repeated signatures as images and insert them directly into the document layout. This streamlines the process while ensuring it meets legal standards. This approach can be used for any documents that need multiple signatures.

Precise Signature Placement

Ensure consistency by specifying exactly where signatures should be placed within your documents. Docusign Anything lets you set precise coordinates for signature fields, making sure everything is in the right place.

Benefits
that keep coming.

Docusign Queue Management

Keep track of all documents sent for signature with detailed insights into who sent them and to whom. Monitor the status of each envelope, quickly resolve any issues, and download signed documents directly to Business Central or your computer. If a document was sent by mistake and hasn't been signed yet, you can easily revoke it.

Easy Setup and Free Demo

Our guided setup process is designed to be straightforward, so you can get up and running quickly. If you want to try it out first, we offer a free demo environment through a Docusign developer account, where you can test as many documents as you need. The demo is fully functional, with the only difference being a watermark on the documents.

Continuously Improving to Meet Your Needs

Docusign Anything is built to adapt and grow alongside your business. **Your feedback drives our innovation**, and we're already working on updates like enhanced bulk sending and multiple signers options to keep you ahead of the curve.

How to Start Using Docusign Anything

Getting started with Docusign Anything is straightforward – your company doesn't need to meet any specific prerequisites, and you don't even need a Docusign account to begin.

During installation and setup, you'll be prompted to choose an owner for the Docusign envelopes.
If your company already has a Docusign subscription, you can designate yourself as the envelope owner. In this case, you remain a direct Docusign customer, and any envelopes used through our integration will be tracked under your existing account and subscription.

If you don't have a Docusign subscription, you can use our envelopes at a special partner price. We'll handle the rest.

FAQ

Finished our e-book and documentation but still have questions? We've gathered answers to the most frequently asked questions to ensure you have all the information you need.

What Are Docusign Envelopes?

Docusign uses "envelopes" as a secure way to transmit documents. Similar to a traditional paper envelope, a Docusign envelope can hold multiple documents and pages, and it can be sent to several signers at once.

An envelope is counted as "used" as soon as it is sent out for signature, even if the recipient doesn't open or sign it. This approach ensures the secure and organized handling of all your digital documents.

Do I Need a Docusign Account to Use Your Product?

No, you don't need a Docusign account to use our product. You won't have to manage another company account or pay for an extra subscription. As an official Docusign partner, we take care of everything for you. We provide the envelopes, so there's no need to log in or track your usage. At the beginning of each month, we'll simply send you an invoice for the envelopes you used in the previous month.
If you already have a Docusign account and envelopes, we're fully equipped to integrate with your existing setup as well.

Is Signing Documents with Docusign Anything Secure?

Yes, it's secure. With Docusign Anything, you can track every document sent from your company right within Business Central using the Docusign Queue. This feature shows the status of each envelope, who sent it, who signed it, and the date and time of the signatures. Each envelope has a unique ID, allowing you to trace its entire journey through both systems.
Beyond our integration, Docusign itself offers robust security features. Every envelope comes with a detailed audit trail, and you can download a Certificate of Completion once the signing process is done. Additionally, Docusign adds a Tamper-evident seal to each document, ensuring that it hasn't been altered after signing.

What Level of Legal Validity Do Signatures Through Docusign Anything Have, and Are They Legal in My Country?

We've consulted with legal experts to ensure our solution meets the necessary standards. The legal requirements for electronic signatures vary depending on your country. However, electronic signatures are legally recognized in most countries, and their acceptance is expanding rapidly across various legal fields.

Documents signed through our integration meet the basic level of electronic signature. In Czech law, this is known as a Simple Electronic Signature (Prostý elektronický podpis). Under EU regulations (eIDAS), it's also referred to as a Simple Electronic Signature, and in the U.S., it's recognized as an Electronic Signature. This level is sufficient for most internal, business, and HR documents you handle in Business Central, such as sales quotes or employment contract amendments.

If you're unsure whether this level of signature is sufficient under your country's laws, we recommend consulting with a legal advisor. Additionally, you can refer to the Docusign eSignature Legality Guide, which provides an overview of the legal requirements for electronic signatures in specific countries. For more details on the types of electronic signatures recognized in the EU, you can also check out this article: Types of Digital Signature: AES, QES, SES, explained.

If you would like to access full product documentation or have any questions, please contact us at **info@onpointserv.com** or **bgolasowska@onpointserv.com**.

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