Customization for eSign

Adobe Sign and DocuSign are two of the world's most trusted electronic signature solutions. Acumatica integrates with both solutions. The Sign connections enable users to prepare, manage and send documents for signing. Users can:

- **Deploy electronic signatures embedded in Acumatica**
- **Capture signatures for contracts, quotes, and agreements**
- **Sign documents electronically for purchase orders and other vendor agreements**
- **Store signed documents and attach to records in Acumatica**
- **Full audit trail and document version history**

Key business benefits

- Manage documents in all stages (drafted, sent, signed, or returned).
- Indicate the fields recipients must complete for each document.
- Create form automation by dragging and dropping fields within Adobe Sign and DocuSign.
- Automatically save signed documents as recorded versions.
- Automate follow-ups to recipients.
- Set expiration dates to void unsigned documents.

Related resources

- Quote-to-Cash for Distribution and Retail > LEARN MORE
- ERP Evaluation Checklist > LEARN MORE
- Schedule a Personalized Demo > LEARN MORE

Unified ERP and eSign Functions Optimize Core Business Operations

Contracts permeate every organization from sales to purchasing. Distributing, verifying, and managing signatures proves cumbersome. Acumatica eSign makes everyday business easier. It combines the convenience of eSign products, like Adobe Sign and DocuSign, with the power of a best-in-class ERP system to streamline operations.

BOOST PRODUCTIVITY, STREAMLINE eSIGNATURES

Employees no longer need to toggle between applications every time they need to authorize a payment, approve a quote, and sign or send out contracts. Acumatica's customization for eSign manages the end-to-end electronic signature process by incorporating Adobe Sign and DocuSign capabilities into the centralized platform.

Acumatica automates signature management workflows. The solution reduces errors and accelerates contract signing by automatically notifying users of documents awaiting their signature and showing them what to complete.

- Enable employees to initiate, request, and track electronic signatures and corresponding documents within Acumatica.
- Simplify eSignature set up process within Document Management, enabling users to create accounts to collect signatures for Adobe Sign and DocuSign.
- Mange document status and view activity by multiple criteria via eSign Central.
- Process multiple documents simultaneously from eSign Sync screen.
- Enable users to specify eSign envelope fields that recipients must complete before signing the document.

"We didn't know what we didn't know when it was paper-based. It's hard to keep track of 250, 300 pieces of paper flying around the office. It's really easy now to go look in there in the incoming documents that it's pending or it's through that process, and it's in somebody's inbox waiting for an approval or they rejected it."

–Eric Hugunin, COO, Phoenix Renovation and Restoration, Inc.

> CUSTOMER STORIES

Intuitive eSignature Process

Enable users to start the signature collection process in Acumatica Document Management. They can set up and manage recipient accounts and specify the fields to fill out.

Unified Platform

Centralize the creation, distribution, and management of eSignatures and the corresponding documents and envelopes in Document Management.

Support for eSign Products

Work with Adobe Sign and DocuSign. Recipients can use one or both eSign products.

Version Control and Audit History

Automatically save all signed documents. Create a separate version of each signed document and attaches it to the original record. Maintain a history of all changes to eSignature documents and provide easy access to versions.
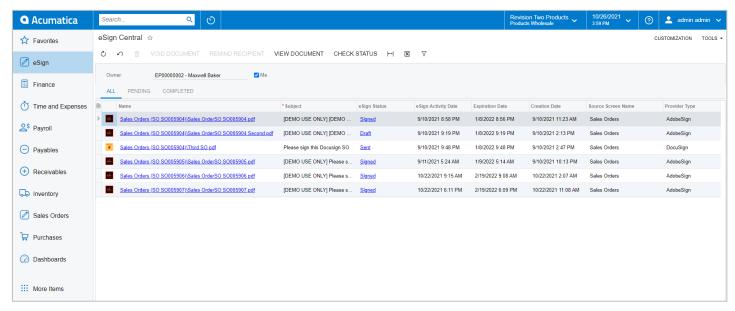
Centralizes Document Management

Manage document status on eSign Central. Process one or multiple documents for the eSign Sync screen.

Flexible Set-Up and Navigation

Enable users to access eSign documents by clicking View Document button in eSign Central. Access activity by file name, subject, activity, status, expiration, screen name, and provider.

Streamlined Envelope Creation and Management

Create eSign envelopes, choose eSign integration (Adobe and/or DocuSign), draft emails, set signing orders, reminders, recipient type, and expiration date from File Management.

eSign Central displays eSignature documents along with their status, activity, expiration, source, and provider.