

The Largest Independent Gathering
of the Microsoft User Ecosystem

| PO-DocuSign Automation

Decrease Complexities,
Deliver Results.

@ 2022 Dynamic Communities



Kiran Bondugula, Technical Engineer
Minchy Shaw, Program Manager
(LIPA)

The Largest Independent Gathering
of the Microsoft User Ecosystem

| **PO-DocuSign Automation**

Decrease Complexities,
Deliver Results.

| Agenda

- Background
- Objectives
- Solution
- Demo
- Q & A



Slide Header Divider

| Background

- Procurement processor generated PO PDF in D365
- Procurement processor downloaded PO PDF into SharePoint
- PO PDF was sent to approver via Email
- Procurement processor received signed PO PDF via Email
- Signed PO PDF was attached in D365 manually

| Objectives

- Improving efficiencies by reducing manual processes
- Increasing productivities by implementing enhanced business processes
- Shifting from collecting/collating data to more data analysis

| Solution

- Click Print Management on the selected PO in D365
- System does the following tasks automatically via Power Automate:
 - ✓ Sending the notification to the procurement processor
 - ✓ Saving PDF into SharePoint
 - ✓ Sending PDF to the designated approver via DocuSign
 - ✓ Logging signed PDF into SharePoint
 - ✓ Attaching signed PDF to the selected PO in D365

DEMO

Q & A

Thank you for Attending!



Decrease Complexities,
Deliver Results.



kbondugula@lipower.org

mshaw@lipower.org

The Largest Independent Gathering
of the Microsoft User Ecosystem