The Largest Independent Gathering of the Microsoft User Ecosystem

PO-DocuSign Automation

Decrease Complexities, Deliver Results.

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COMMUNITY

For Users, By Users

Agenda

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

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Slide Header Divider



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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



For Users, By Users

Objectives

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



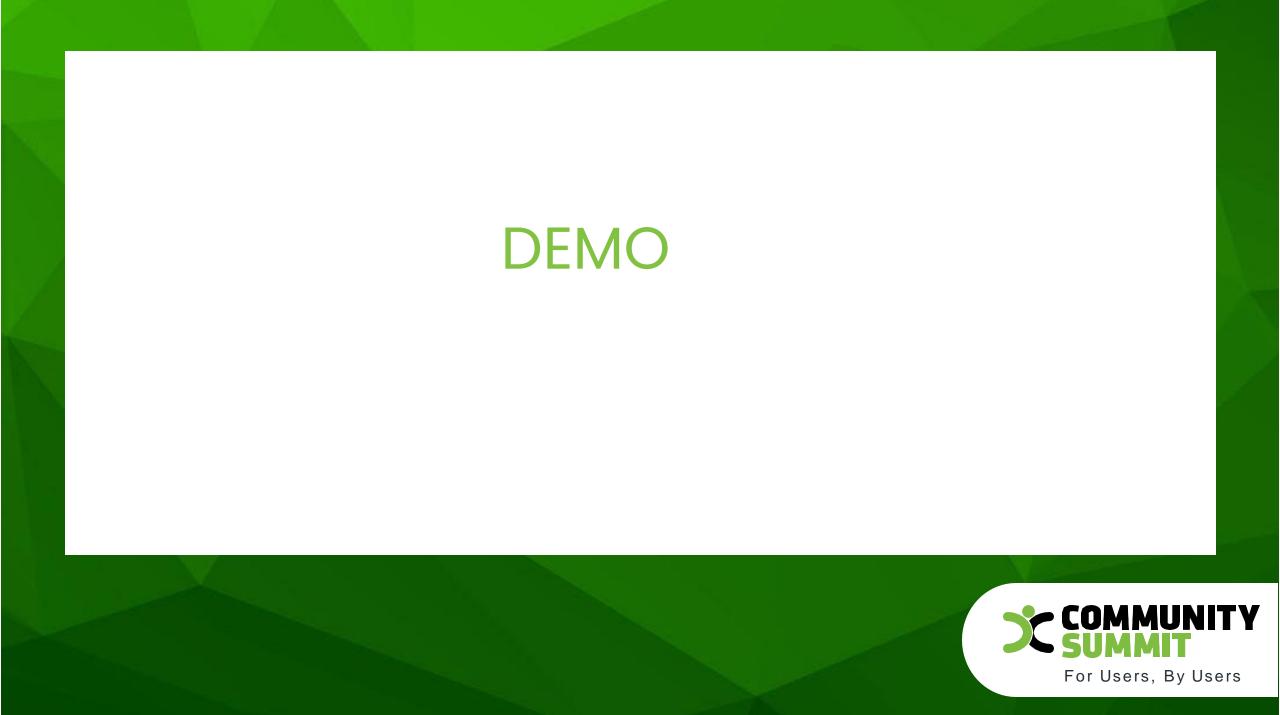
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Solution

- 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



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Thank you for Attending!



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