

## Unified ERP and eSign Functions Optimize Core Business Operations

Contracts undergird every aspect of an organization from sales to purchasing and HR. Distributing, verifying, and managing associated 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 routine business 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. In addition to automating the workflow, Acumatica maintains a complete audit trail and version history for easy reconciliation.

- Enables employees to initiate, request, and track electronic signatures and corresponding documents within Acumatica
- Simplifies eSignature set up process within Document Management, enables users to create accounts to collect signatures for Adobe Sign and DocuSign
- Manages document status, allow users to view activity by multiple criteria via eSign Central
- Lets users process multiple documents simultaneously from eSign Sync screen
- Creates, manages, sends, and tracks each eSign envelope. Enables users to track documents through multiple criteria
- Enables users to specify eSign envelope fields that recipients must complete before signing the document

### KEY BENEFITS

#### CENTRALIZED PROCESSES ON UNIFIED PLATFORM

- Creates envelopes for eSignatures from one screen
- Manages or processes documents in all stages (drafted, sent, or signed and returned) across multiple modules

#### AUTOMATED WORKFLOWS

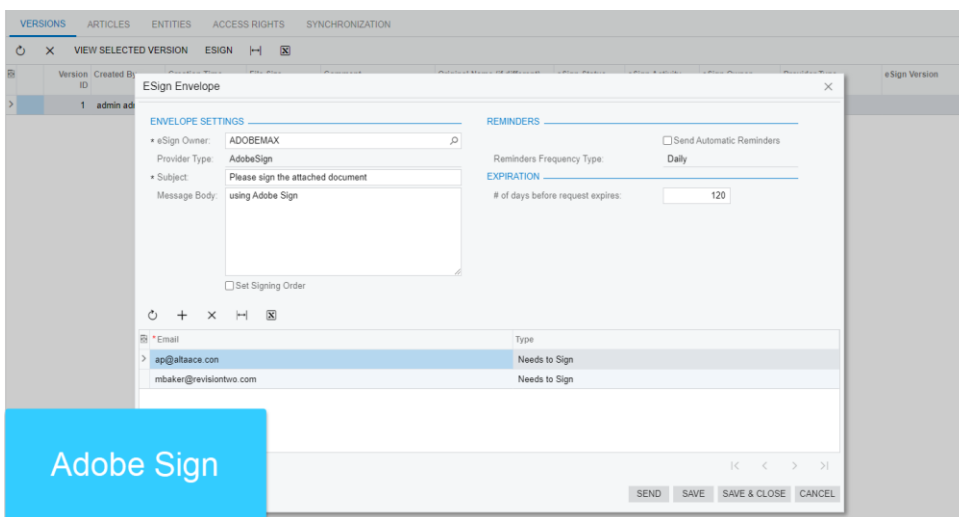
- Indicates fields recipients must complete, such as signature, address, and company
- Creates form automation by dragging and-dropping fields within Adobe Sign and DocuSign

#### VERSION CONTROL

- Automatically saves signed documents as recorded versions
- Maintains full audit history of document changes

#### POWERFUL AUTOMATION

- Sends automatic follow-ups for eSign requests
- Sets expiration dates to void unsigned documents



Acumatica eSign presents the eSignature envelope for easy customization and distribution.

## ACUMATICA ESIGN FEATURES AND CAPABILITIES

<b>Intuitive eSignature Process</b>	Enables 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.
<b>Unified Platform</b>	Centralizes the creation, distribution, and management of eSignatures and the corresponding documents and envelopes in Document Management.
<b>Support for eSign Products</b>	Works with Adobe Sign and DocuSign. Recipients can use one or both eSign products.
<b>Version Control and Audit History</b>	Automatically saves all signed documents. Creates a separate version of each signed document and attaches it to the original record. Maintains a history of all changes to eSignature documents and provides easy access to versions.
<b>Centralizes Document Management</b>	Manages document status on eSign Central. Processes one or multiple documents for the eSign Sync screen.
<b>Flexible Set-Up and Navigation</b>	Enables 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.
<b>Streamlined Envelope Creation and Management</b>	Can create eSign envelopes, choose eSign integration (Adobe and/or DocuSign), draft emails, set signing orders, reminders, recipient type, and expiration date from File Management.

Name	Subject	eSign Status	eSign Activity Date	Expiration Date	Creation Date	Source Screen Name	Provider Type
Sales Orders /SO_S0005904/Sales Order/SO_S0005904.pdf	[DEMO USE ONLY] DEMO ...	Signed	9/10/2021 8:58 PM	1/8/2022 8:56 PM	9/10/2021 11:23 AM	Sales Orders	AdobeSign
Sales Orders /SO_S0005904/Sales Order/SO_S0005904 Second.pdf	[DEMO USE ONLY] [DEMO ...	Draft	9/10/2021 9:19 PM	1/8/2022 9:19 PM	9/10/2021 2:13 PM	Sales Orders	AdobeSign
Sales Orders /SO_S0005904/Third SO.pdf	Please sign this DocuSign SO	Sent	9/10/2021 9:48 PM	1/8/2022 9:48 PM	9/10/2021 2:47 PM	Sales Orders	DocuSign
Sales Orders /SO_S0005905/Sales Order/SO_S0005905.pdf	[DEMO USE ONLY] Please s...	Signed	9/11/2021 5:24 AM	1/9/2022 5:14 AM	9/10/2021 10:13 PM	Sales Orders	AdobeSign
Sales Orders /SO_S0005906/Sales Order/SO_S0005906.pdf	[DEMO USE ONLY] Please s...	Signed	10/22/2021 9:15 AM	2/19/2022 9:08 AM	10/22/2021 2:07 AM	Sales Orders	AdobeSign
Sales Orders /SO_S0005907/Sales Order/SO_S0005907.pdf	[DEMO USE ONLY] Please s...	Signed	10/22/2021 6:11 PM	2/19/2022 6:09 PM	10/22/2021 11:08 AM	Sales Orders	AdobeSign

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

### ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

**Business Resilience. Delivered.**

Contact us today to get started: [888-228-8300](tel:888-228-8300) | [acumatica.com](https://www.acumatica.com)