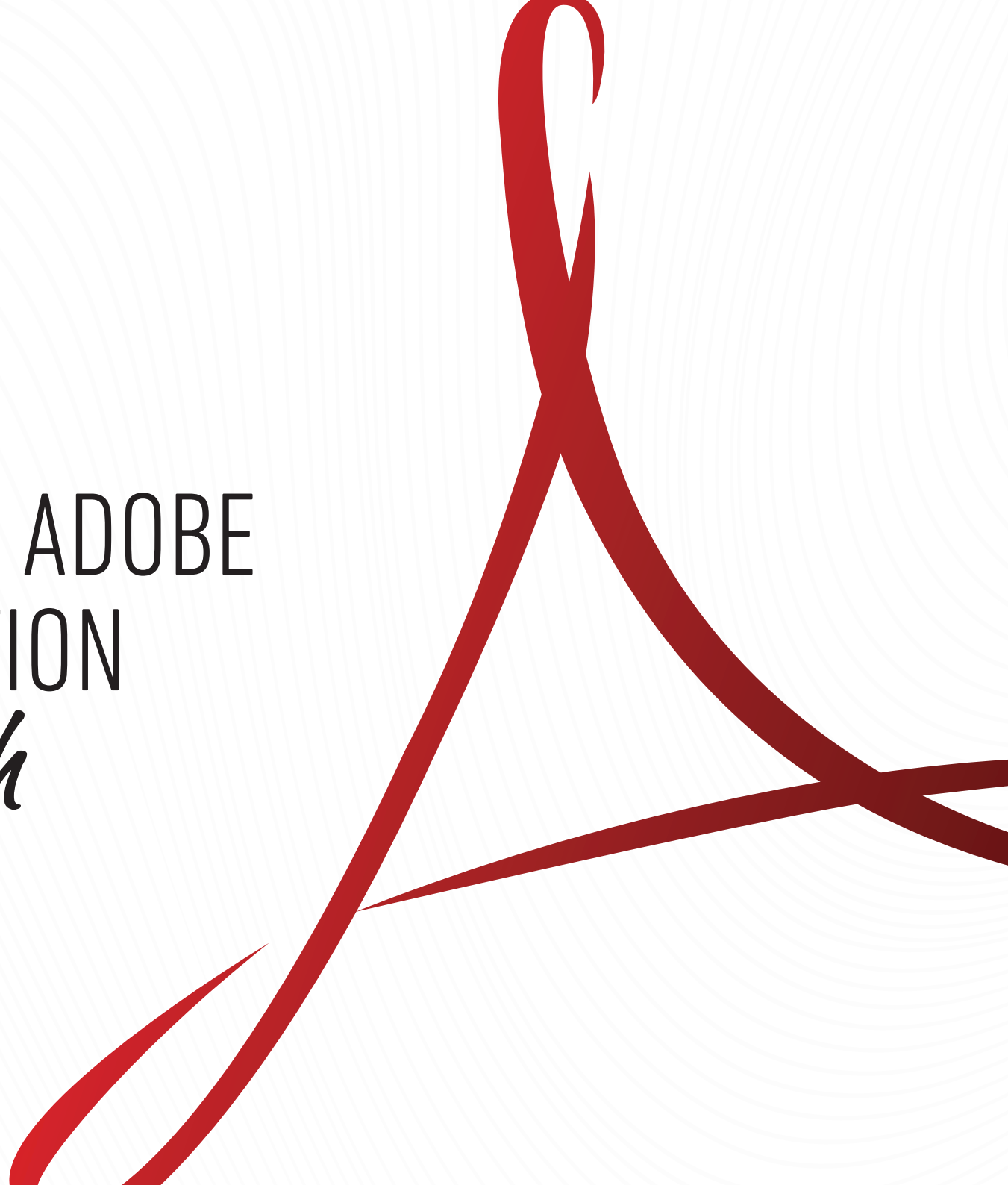


# WORKBOOKS & ADOBE SIGN INTEGRATION

*Click Through  
Demo*



# ADOBE SIGN AND WORKBOOKS CRM

## Summary

Leverage the power of the **Adobe Sign** and **Workbooks** integration to send quotes, orders and contracts for electronic signature and fully automate the signing and approvals across departments and business processes. Workbooks will track the document processing as it is signed. It will automatically store the final version and audit history as an attachment against the transaction document, allowing you to close sales more quickly, eliminate paperwork and improve your customer experience.

## Benefits

### Digitise your customer experience

Customers more than ever before expect to do business digitally. No one wants to deal with complicated paper-based forms, they want a smooth customer experience. Quite often the process of signing agreements is the first interaction a customer will have with your business. First impressions are key, which is why many business decision makers are making digital transformation a top priority.

### Get up and running quickly with our simple integration

With an Adobe Sign Enterprise Licence, the API is used for a quick and easy integration with Workbooks CRM so no IT skills are required. With Workbooks Adobe Sign plugin, you will be able to personalise the record types you would like the integration to run on. Setting up your e-signature to the PDF will stop you having to draw it every time you send a document, allowing you to close sales more quickly.

### Process optimisation and cost reduction

Leverage the power of Adobe Sign and Workbooks CRM integration to replace mounting paper work with process buttons to generate documents at the click of a button. With the existing information stored in the CRM system, you can use branded templates that will be automatically populated with customer and product/service details, as well as your T&Cs. Move to a smarter solution to save you time and money enabling you to focus on what really matters.

### Flexible and convenient for your team and your customers

As Workbooks CRM and Adobe Sign solutions are cloud-based, you can access documents anytime, anywhere and from any device. Promote team collaboration, where everyone can share and access documents. Additionally, add custom fields to be completed by the customer to automatically feed back into Workbooks and give your customer a seamless experience.

### Real-time tracking of your documents progress

You can quickly see who has been sent the document, who has viewed it, opened and signed it. An activity will be created to simplify the tracking of your document's progress and you will be notified instantly once it's completed and stored in Workbooks. Create reports to give you an overview of your documents' statuses, in real-time and dive into each documents' audit trail in Workbooks.

READ ON TO SEE HOW WORKBOOKS CRM AND ADOBE SIGN INTEGRATE

The user creates a new order in Workbooks.



The screenshot displays the Workbooks.com user interface. At the top left, the user's profile is shown as 'Tony Khan' with the subtitle 'My Organisation'. Below this is a search bar. The main navigation menu is on the left, listing various categories: New, Favourites, Dashboards, People, Organisations, Activities, Emails, Cases, Sales, Marketing, Finance, Reporting, Import, Bulk Actions, Auditing, and Configuration. The 'Sales' category is expanded, showing a list of options: Person, Organisation, Task, Meeting, Email, Sales Lead, Opportunity, Customer Quotation, Customer Order, Sales Forecast, Marketing Campaign, Case, and Report. The 'Customer Order' option is highlighted, and a sub-menu is visible to its right, containing 'Customer Order' and 'Software Orders'. At the bottom left, the date and time are displayed as 'Fri 16 Mar 2018 14:29'. Below this are buttons for 'Preferences', 'Recent Items', and 'Logout'. The bottom right corner features the 'Workbooks.com' logo. The background of the interface is a blurred image of a person.

Tony Khan  
My Organisation

Search...

New > Favourites > Dashboards > People > Organisations > Activities > Emails > Cases > Sales > Marketing > Finance > Reporting > Import > Bulk Actions > Auditing > Configuration

Person > Organisation > Task > Meeting > Email > Sales Lead > Opportunity > Customer Quotation > Customer Order > Sales Forecast > Marketing Campaign > Case > Report

Customer Order > Software Orders

Preferences Recent Items Logout

Fri 16 Mar 2018 14:29

Workbooks.com

<https://maindemo.workbooks.com/link/xETNxUTM/desktop#>

Once the order details have been completed, the user 'runs a process' to send the order to Adobe Sign. This runs an automation that connects to Adobe Sign, takes the PDF document that is attached to a template and sends it to Adobe Sign.



The screenshot displays the Workbooks.com interface for a Customer Order. The main window is titled "#ORD-7 - Cambridgeshire Computer Services - VoIP & Support". The left sidebar contains navigation icons for Dashboards, Search, Recent Items, Help, Training Videos, Sales Pipeline, Customer Su..., and My Sales Das... The top navigation bar includes tabs for Main, Summary (9), Notes (0), Activities (0), Emails (0), People (1), Organisations (1), Transactions (4), Related Items (1), and Adobe Sign. The main content area is divided into several sections:

- Document Type Description:** Customer Order, Status: POSTED, Customer Order reference: ORD-7, Customer Order Name: Cambridgeshire Computer Services - VoIP & Support, Customer Order Date: 09/08/2015, Document Currency: GBP, Comments: (empty text area).
- Adobe Sign:** Adobe Sign Task: (dropdown), Adobe Sign Document Status: New Order, Send to Adobe Sign? (checked).
- Finance Details:** Invoice Contact: Aaron Ward (Cambridgeshire Computer Services), Primary Contact: Aaron Ward (Cambridgeshire Computer Services), Email Address: aaron.ward@cambridgeshirecomputerservices.com.
- Project Information:** Submitted Company Name, Submitted Name, Primary Contact: (dropdown).

The bottom status bar shows the date and time: Fri 16 Mar 2018 14:34, and the URL: https://maindemo.workbooks.com/link/xETN:UTM/ORD-7#.

A pop up appears to let the user know that a PDF has been successfully generated and has been sent to Adobe Sign. A 'Success' notification also appears.



The screenshot displays a CRM application window titled "ORD-7 - Cambridgeshire Computer Services - VoIP & Support". The interface includes a sidebar with navigation icons for Dashboards, Search, Recent Items, Help, Training Videos, Sales Pipeline, Customer Su..., and My Sales Das... The main content area shows document details for a "Customer Order" with status "POSTED". A modal dialog titled "Document Successfully Sent" is overlaid on the screen, containing the message: "A PDF has been generated and sent to Adobe Sign. Click OK to complete next steps in Adobe Sign." Below the message is an "OK" button. At the bottom left, a "Success" notification states: "ORD-7 - Cambridgeshire Computer Services - VoIP & Support" saved. The bottom right corner features the "Workbooks.com" logo.



Before the user sends the document they can add a message to the outgoing email, as well as options such as password protection, additional recipients, etc. The primary recipient is automatically added by Workbooks.



ORD-7 - Cambridgeshire Computer Services - VoIP & Support

Main Summary (13) Notes (0) Activities (1) Emails (0) People (1) Organisations (1) Transactions (4) Related Items (1) Adobe Sign

Open

If you cannot see the item below click on the open button above to view it in a new tab in your web browser.

Adobe Sign Upgrade ?

Dashboard Send Manage Reports Account API Workbooks

Recipients

Complete in Order Complete in Any Order

Add Me Add Recipient Group ?

1 aaron.ward@cambridgeshirecomputerservices.com Email

2 Enter recipient email

Show CC

Message

Cambridgeshire Computer Services - ORD-7.pdf

Please review and complete Cambridgeshire Computer Services - ORD-7.pdf.

Options

☐ Password Protect

☐ Set Reminder

Signature Type

Electronic Written

Recipients' Language

English: UK

Files

Add Files

Cambridgeshire Computer Services - ORD-7.pdf

Drag More Files Here

Language English: UK

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Fri 16 Mar 2018 14:41

Workbooks.com

The user clicks on the 'Send' button to send the order to be signed.



ORD-7 - Cambridgeshire Computer Services - VoIP & Support

Main

Summary (13)

Notes (0)

Activities (1)

Emails (0)

People (1)

Organisations (1)

Transactions (4)

Related Items (1)

Adobe Sign

Open

If you cannot see the item below click on the open button above to view it in a new tab in your web browser.

Adobe Sign

Upgrade ?

Dashboard

Send

Manage

Reports

Account

API

Workbooks

Recipients

Complete in Order

Complete in Any Order

Add Me

Add Recipient Group ?

1

aaron.ward@cambridgeshirecomputerservices.com

Email

2

dharmesh.ghedia@workbooks.com

Email

3

Enter recipient email

Show CC

Message

Cambridgeshire Computer Services - ORD-7.pdf

Please review and complete Cambridgeshire Computer Services - ORD-7.pdf.

Files

Add Files

Cambridgeshire Computer Services - ORD-7.pdf

Drag More Files Here

Options ?

Password Protect

Set Reminder

Signature Type

Electronic

Written

Recipients' Language

English: UK

Preview & Add Signature Fields

Send

Language English: UK

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ORD-7 - Cambridgeshire Computer Services - VolP & Support
🔍 ⌵ ↗ ✕

[Main](#) | 
 [Summary \(13\)](#) | 
 [Notes \(0\)](#) | 
 [Activities \(1\)](#) | 
 [Emails \(0\)](#) | 
 [People \(1\)](#) | 
 [Organisations \(1\)](#) | 
 [Transactions \(4\)](#) | 
 [Related Items \(1\)](#) | 
 [Adobe Sign](#)

Open

If you cannot see the item below click on the open button above to view it in a new tab in your web browser.

---

**Adobe Sign**

New! Upgrade ?

Dashboard Send Manage Reports Account API

Workbooks ▼

My Organisation  
 My Organisation  
 100 High Street  
 London  
 EC1A 3BB  
 UK  
 Tel: +44 (0) 20 1234 5678  
 Fax: +44 (0) 20 1234 5679  
 Web: www.cambsccs.com

**Customer Order**

Cambridgeshire Computer Services  
 100 High Street  
 London  
 EC1A 3BB  
 United Kingdom

Org Reference: 100001  
Date: 2017/03/16  
Issue Date: 2017/03/16

Cambridgeshire Computer Services - VolP & Support

Quantity	Product Code	Description	Unit Price	Total Price
1	RD-7-PDF-001	VolP New Service	£10.00	£10.00
1	RD-7-PDF-002	Fixed Fee Installation	£10.00	£10.00
1	RD-7-PDF-003	Training Day - Installation	£10.00	£10.00
		<b>Tax</b>	<b>VAT</b>	<b>TOTAL</b>
			£0.00	£30.00

**Your PDF Number:**

**Print Name:**

**Position:**

**Sign & Date:**

## “[DEMO USE ONLY] Cambridgeshire Computer Services - ORD-7.pdf” has been successfully sent for signature

A copy has also been sent to you at demo.echosign@workbooks.com for your records.  
 “[DEMO USE ONLY] Cambridgeshire Computer Services - ORD-7.pdf” was sent for signature to recipient group (aaron.ward@cambridgeshirecomputerservices.com) and recipient group (dharmesh.gheia@workbooks.com). They will complete “[DEMO USE ONLY] Cambridgeshire Computer Services - ORD-7.pdf” in order, one after the other.  
 As soon as the agreement is complete, all eligible parties will be emailed PDF copies.

### Reminders

There are no reminders set for this document.

You will be alerted if:

- The document you sent has **not been viewed by today at 22:48.**
- The document you sent has **not been signed by 17 Mar at 14:48.**

[Change alert settings](#)

### What's next?

[Send Another Document](#)
[Go to the 'Manage' page](#)

Language English: UK ▼

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On the 'Main' tab of the order, the Adobe Sign Document Status changes to 'Generated/Sent to Adobe Sign'.



The screenshot displays a CRM interface for an order titled "ORD-7 - Cambridgeshire Computer Services - VoIP & Support". The "Main" tab is selected, showing various document details and Adobe Sign integration options.

**Document Details:**

- Document Type Description: Customer Order
- Status: POSTED
- Customer Order reference: ORD-7
- Customer Order Name: Cambridgeshire Computer Services - VoIP & Support
- Customer Order Date: 09/08/2015
- Document Currency: GBP
- Comments: (Empty text area)

**Adobe Sign Section:**

- Assigned to: --- Me ---
- Own Organisation: My Organisation
- Customer: Cambridgeshire Computer Services
- Location: (Empty dropdown)
- Address: 170 Grange Road, London, SE1 1AA, United Kingdom
- Order Type: Standard
- Order Status: Ordered
- Source: Email Blast

**Adobe Sign Task and Status:**

- Adobe Sign Task: TASK-896
- Adobe Sign Document Status: **Generated/Sent to Adobe Sign** (highlighted in orange)
- Send to Adobe Sign? ☒

**Finance Details:**

- Invoice Contact: Aaron Ward (Cambridgeshire Computer Services)
- Primary Contact: Aaron Ward (Cambridgeshire Computer Services)
- Email Address: aaron.ward@cambridgeshirecomputerservices.com

**Project Information:**

- Submitted Company Name: (Empty text field)
- Submitted Name: (Empty text field)
- Primary Contact: (Empty dropdown)

**Left Sidebar:**

- Dashboards
- Search
- Recent Items
- Help
- Training Videos
- Sales Pipeline
- Customer Su...
- My Sales Das...

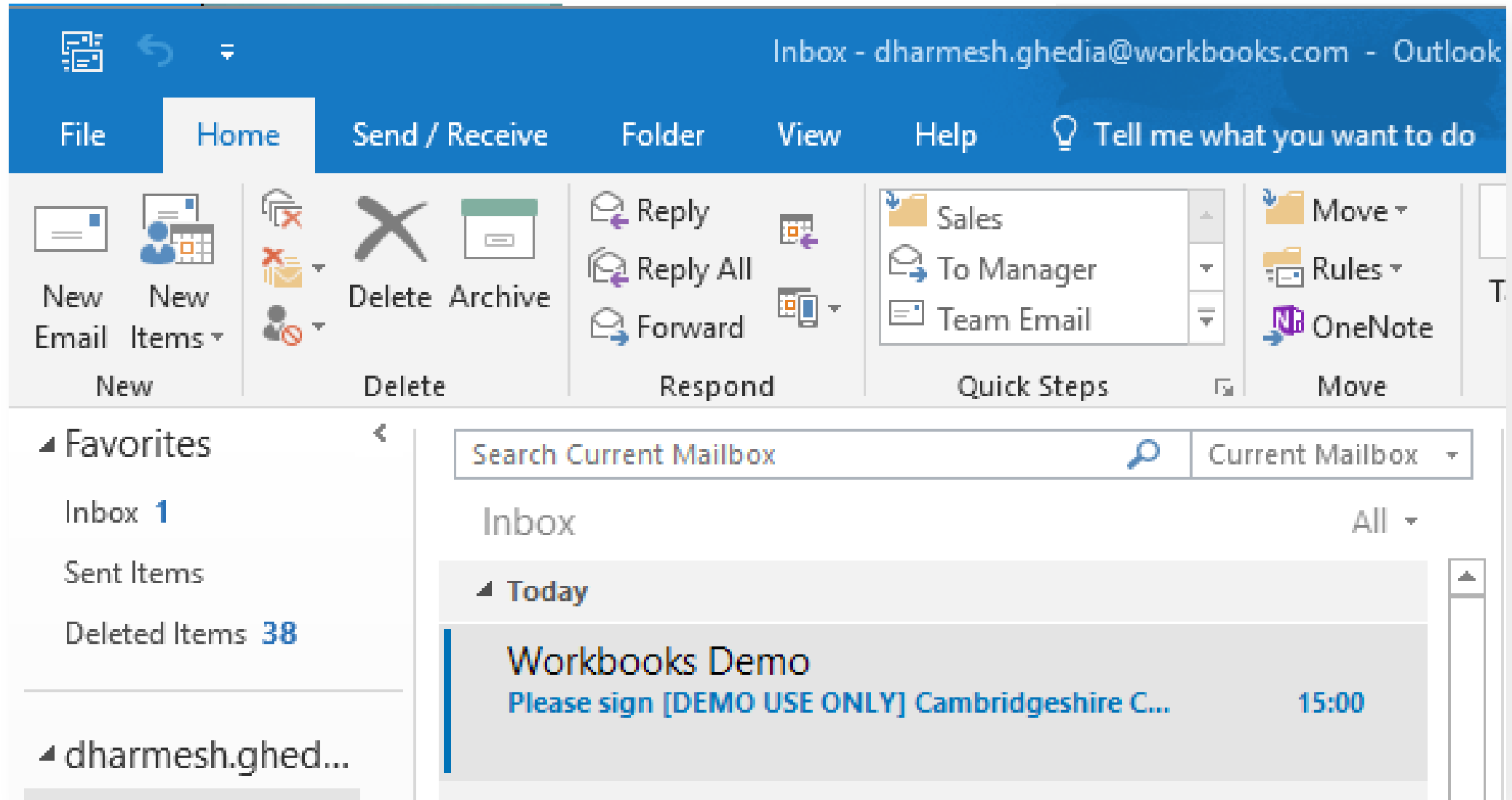
**Bottom Left:**

Fri 16 Mar 2018 14:37

**Bottom Right:**

Workbooks.com

The email is received by the recipient in their email inbox.



The user opens the email and clicks on 'Click here to review and sign'.




Reply Reply All Forward

WD Workbooks Demo <echosign@echosign.com> Dharmesh Ghedia 14:59


Please sign [DEMO USE ONLY] Cambridgeshire Computer Services - ORD-7.pdf

If there are problems with how this message is displayed, click here to view it in a web browser.

Action Items + Get more add-ins



## Adobe Sign



Customer Order

Cambridgeshire Computer Services

170 George Road  
London  
SE1 1SA  
United Kingdom

Our Reference: 00012  
Date: 08/06/2015  
Person: Dharmesh

Cambridgeshire Computer Services - Staff & Support

Quantity	Product Code	Description	Unit Price	Line Total
1	10101	10101	10101	10101
1	10102	10102	10102	10102
1	10103	10103	10103	10103
1	10104	10104	10104	10104
1	10105	10105	10105	10105
1	10106	10106	10106	10106
1	10107	10107	10107	10107
1	10108	10108	10108	10108
1	10109	10109	10109	10109
1	10110	10110	10110	10110
1	10111	10111	10111	10111
1	10112	10112	10112	10112
1	10113	10113	10113	10113
1	10114	10114	10114	10114
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1	10335	10335	10335	10335
1	10336	10336	10336	10336
1	10337	10337	10337	10337
1	10338	10338	10338	10338
1	10339	10339	10339	10339
1	10340			

The order opens up.



Adobe Sign

Alternative actions

[DEMO USE ONLY] Cambridgeshire Computer Services - ORD-7.pdf

Next required field 1

My Organisation  
Unit 9  
Suttons Business Park  
Reading  
Berkshire  
RG6 1AZ  
United Kingdom  
Telephone +44 118 3030 100  
Fax +44 118 3030 102  
Web www.workbooks.com

Customer Order

Cambridgeshire Computer Services  
170 Grange Road  
London  
SE1 1AA  
United Kingdom

Our Reference  
Date  
FAO

ORD-7  
09/08/2015  
Aaron Ward

Cambridgeshire Computer Services - VoIP & Support

Quantity	Product Code	Description	Unit Price	Line Total
49	VOIP_PHONE	VoIP Phone Handset	£125.00	£6,125.00
1	SUPPORT_3	3 Month Maintenance/Support	£400.00	£400.00
2	INSTALL	Consulting, Dev., Installation	£4,000.00	£8,000.00
				£25.00
				£705.00
				£230.00

Your PO Number

Print Name

Position

Sign & Date

\* Click here to sign

Start

Message from Workbooks Demo

Please review and complete Cambridgeshire Computer Services - ORD-7.pdf.

1 / 1

When the recipient clicks to sign the order, they are provided with various options to sign (type, draw, image or mobile).



Adobe Sign

Alternative actions

Type

Draw

Image

Mobile

Next required field 1

Sign

Type your signature here

Close

Apply

United Kingdom

Cambridgeshire Computer Services - VoIP & Support

Quantity	Product Code	Description	Unit Price	Line Total
49	VOIP_PHONE	VoIP Phone Handset	£125.00	£6,125.00
1	SUPPORT_3	3 Month Maintenance/Support	£400.00	£400.00
2	INSTALL	Consulting Day - Installation	£4,000.00	£8,000.00
				525.00
				705.00
				230.00

Adobe Sign Test Document

Not for commercial use

Your PO Number

Print Name

Position

Sign & Date

\* Click here to sign

Next

1 / 1

The order is signed.



Adobe Sign

Alternative actions

Type

Draw

Image

Mobile

Sign

Dharmesh Ghedia

Clear

Close

Apply

United Kingdom

Cambridgeshire Computer Services - VoIP & Support

Quantity	Product Code	Description	Unit Price	Line Total
49	VOIP_PHONE	VoIP Phone Handset	£125.00	£6,125.00
1	SUPPORT_3	3 Month Maintenance/Support	£400.00	£400.00
2	INSTALL	Consulting Day - Installation	£4,000.00	£8,000.00
				525.00
				705.00
				230.00

Adobe Sign Test Document

Not for commercial use

Your PO Number

Print Name

Position

Sign & Date

Click here to sign

Next

1 / 1



The signature is added to the order. The recipient clicks on 'Click to Sign' to sign and send the order back.



Adobe Sign

Alternative actions

[DEMO USE ONLY] Cambridgeshire Computer Services - ORD-7.pdf

Completed

My Organisation  
Unit 9  
Suttons Business Park  
Reading  
Berkshire  
RG6 1AZ  
United Kingdom  
Telephone +44 118 3030 100  
Fax +44 118 3030 102  
Web www.workbooks.com

Customer Order

Cambridgeshire Computer Services  
170 Grange Road  
London  
SE1 1AA  
United Kingdom

Our Reference  
Date  
FAO

ORD-7  
09/08/2015  
Aaron Ward

Cambridgeshire Computer Services - VoIP & Support

Quantity	Product Code	Description	Unit Price	Line Total
49	VOIP_PHONE	VoIP Phone Handset	£125.00	£6,125.00
1	SUPPORT_3	3 Month Maintenance/Support	£400.00	£400.00
1	INSTALL	Consulting, Dev, Installation	£1,000.00	£1,000.00
				525.00
				705.00
				230.00

Adobe Sign Test Document

Not for commercial use

Your PO Number

Print Name

Position

Sign & Date

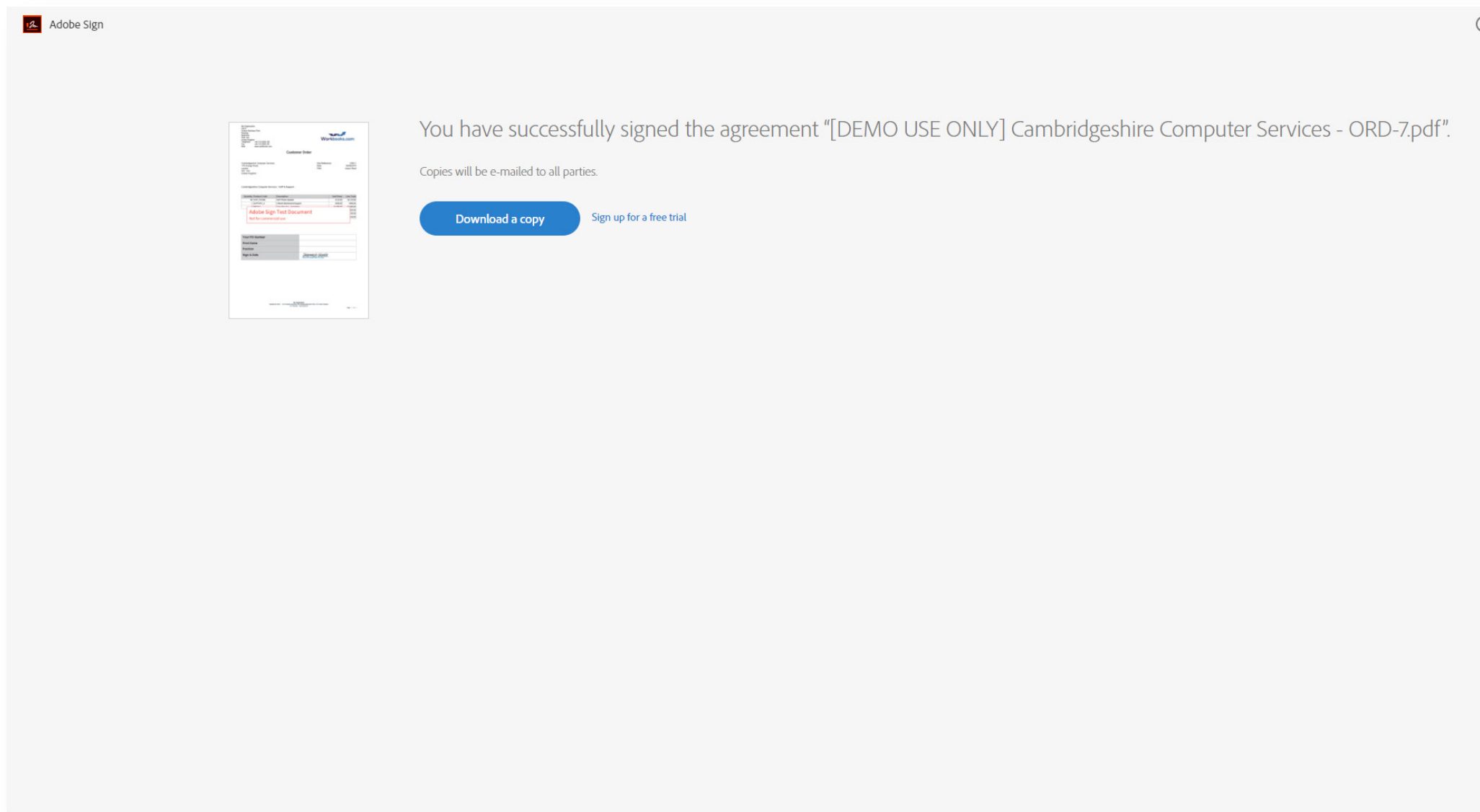
Dharmesh Ghedia

09/08/2015

I agree to the Terms of Use and Consumer Disclosure of this document

Click to Sign

The recipient receives a success notification and can also download the order/document for their own records.



Back in Workbooks, the user receives a notification advising them the order has been signed.



ORD-7 - Cambridgeshire Computer Services - VoIP & Support

Main Summary (20) Notes (0) Activities (3) Emails (0) People (1) Organisations (1) Transactions (4) Related Items (1) Adobe Sign

Open

If you cannot see the item below click on the open button above to view it in a new tab in your web browser.

Adobe Sign Upgrade ?

Dashboard Send Manage Reports Account API Workbooks

Recipients

Complete in Order Complete in Any Order Add Me Add Recipient Group ?

1 aaron.ward@cambridgeshirecomputerservices.com Email

2 Enter recipient email

Show CC

Message

Cambridgeshire Computer Services - ORD-7.pdf

Please review and complete Cambridgeshire Computer Services - ORD-7.pdf.

Files Add Files

Cambridgeshire Computer Services - ORD-7.pdf

Drag More Files Here

Options ?

☐ Password Protect

☐ Set Reminder

Signature Type

☒ Electronic ☐ Written

Recipients' Language

English: UK

Notifications

Title	Due
Your document has been signed. Click "Open" to v...	
All recipients have signed your document	
ORD-7	
Cambridgeshire Computer Services - VoIP & Support	

Open Snooze Dismiss

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Workbooks.com

The signed order is created as a signed task under the 'Activities' tab of the order.



The screenshot displays a CRM interface for 'ORD-7 - Cambridgeshire Computer Services - VoIP & Support'. The 'Activities' tab is active, showing a table with one entry: 'SIGNED - TASK-898 - 16/0...' assigned to 'Tony Khan' with a status of 'Complete' and a due date of '16/03/...'. The interface includes a sidebar with navigation options like Dashboards, Search, Recent Items, Help, Training Videos, Sales Pipeline, Customer Su..., and My Sales Das... The bottom of the screen shows the date 'Fri 16 Mar 2018 15:19' and a footer with 'Workbooks.com' and 'Displaying 1 - 1 of 1'.

Subject	Files?	Type	Assigned to	Status	Due Date	Start ti...	Duration	Context	Attendees	Name
SIGNED - TASK-898 - 16/0...	<input checked="" type="checkbox"/>	Adobe ...	Tony Khan	Complete	16/03/...			Related	Aaron Ward, dharmesh.g...	Aaron Ward

Here is an example of the signed activity.



The screenshot displays the Adobe Sign web interface. The top navigation bar includes tabs for 'Main', 'Notes (4)', 'Related Items (3)', and 'Files (2)'. Below this is a toolbar with buttons for 'Save & Close', 'Save', 'Run Process', 'Apply Template', 'Send Email', 'Complete', 'Delete', 'Watch', and a settings icon. The main content area is titled 'SIGNED - TASK-898 - 16/03/2018'. It contains a form with the following fields: 'Subject' (SIGNED - TASK-898 - 16/03/2018), 'Due Date' (16/03/2018), 'Completed date' (16/03/2018), 'Reminder' (checkbox), 'Assigned to' (--- Me ---), 'Type' (Adobe Sign), 'Status' (Complete), and 'Priority' (Medium). Below the form is the 'Attendees' section, which includes a 'Required' field with the name 'Aaron Ward' and email 'dharmesh.ghedia@workbooks.com'. The 'Adobe Sign' section contains the 'Adobe Sign Document URL' (https://secure.workbooks.com/process/xETNxUTM/Adobe\_Sign\_Document\_Listener?doc\_status=complete) and the 'Adobe Sign Related Record Information' (Private::Accounting::SalesOrder-184). The left sidebar features a navigation menu with icons for Dashboards, Search, Recent Items, Help, Training Videos, Sales Pipeline, Customer Su..., and My Sales Das... The bottom of the sidebar shows the date and time: Fri 16 Mar 2018 15:20. The bottom right corner of the interface features the Workbooks.com logo.

The signed order is stored and can be viewed in the 'Files' tab, along with the audit report.



The screenshot displays the Adobe Sign Task UI for a task titled "SIGNED - TASK-898 - 16/03/2018". The interface includes a sidebar with navigation options: Dashboards, Search, Recent Items, Help, Training Videos, Sales Pipeline, Customer Su..., and My Sales Das... The main content area shows the "Files" tab with a table of uploaded files.

File	Extension	Size	Date uploaded ↓
SIGNED-Cambridgeshire Computer Services - ORD-7.pdf	pdf	83.6 KB	16/03/2018 15:12:18
SIGNED-audit report		76.1 KB	16/03/2018 15:12:18

The bottom of the interface shows a pagination bar indicating "Page 1 of 1" and a status bar stating "Displaying 1 - 2 of 2".



Back on the 'Main' tab of the order, the Adobe Sign Document Status changes to 'Document Signed'.



The screenshot displays the 'Main' tab of an order for 'Cambridgeshire Computer Services - VoIP & Support'. The document is in a 'POSTED' status. The Adobe Sign section shows the document status as 'Document Signed'. The finance details section shows the invoice contact as Aaron Ward. The project information section shows the submitted company name and primary contact.

**Document Details:**

- Document Type Description: Customer Order
- Status: POSTED
- Customer Order reference: ORD-7
- Customer Order Name: Cambridgeshire Computer Services - VoIP & Support
- Customer Order Date: 09/08/2015
- Document Currency: GBP
- Comments:

**Adobe Sign:**

- Adobe Sign Task: TASK-899
- Adobe Sign Document Status: Document Signed
- Send to Adobe Sign? ☒

**Finance Details:**

- Invoice Contact: Aaron Ward (Cambridgeshire Computer Services)
- Primary Contact: Aaron Ward (Cambridgeshire Computer Services)
- Email Address: aaron.ward@cambridgeshirecomputerservices.com

**Project Information:**

- Submitted Company Name:
- Submitted Name:
- Primary Contact:

**Additional Fields:**

- Analysis:

**Line Items:**

- Add line item

