

Top Tools to Use with Salesforce

DocuSign integrations that
make your life easier

Over 150,000 organizations of all sizes are currently using Salesforce to grow their business and succeed. An important part of that success comes from partners who have invested in creating native applications on the Salesforce platform. DocuSign has been one of those partners for ten years, with several applications and thousands of five-star ratings on the Salesforce AppExchange.

The DocuSign Agreement Cloud™ for Salesforce is digitally transforming the way people do business via contracts and other types of business agreements. It comprises 6 integrated applications built specifically to help Salesforce customers digitize the agreement process across every stage. All the way from preparing and signing agreements, to taking agreement-based actions, to managing agreements for their lifetime. And it all works with Salesforce.

With the DocuSign Agreement Cloud for Salesforce, organizations can do business faster, with less risk, lower costs and a better experience for customers and employees. A perfect example is Salesforce itself, which uses DocuSign eSignature across thousands of sales reps and multiple departments within the company.

In this eBook we highlight a handful of the most valuable applications available to Salesforce users for accelerating agreements:

1/ DocuSign eSignature for Salesforce

2/ DocuSign eSignature for Salesforce CPQ

3/ DocuSign Gen for Salesforce & DocuSign Negotiate for Salesforce

4/ DocuSign CLM for Salesforce

5/ DocuSign eSignature for Salesforce Essentials

1/ DocuSign eSignature for Salesforce

DocuSign eSignature for Salesforce is the most downloaded eSignature app on the [Salesforce AppExchange](#). Salesforce itself uses DocuSign in Sales, HR, Purchasing and Procurement, among other departments to ensure contracts are turned around at lightning speed. In fact, 90% of sales contracts are completed within the same day, 71% within an hour.

With [DocuSign eSignature for Salesforce](#), you can:

Merge data from any Salesforce object into an agreement

Send agreements for signature from within the Salesforce user interface

Automatically write completed agreements back to Salesforce, along with any data collected as part of the signing process, such as PO numbers

Enable your customers to sign electronically on a wide variety of devices, from practically anywhere, anytime

Automatically update an opportunity to “Closed Won” when an agreement is completed

Track all of your DocuSign transactions with Lightning components in Salesforce

DocuSign eSignature for Salesforce works across Salesforce clouds and connects to external systems such as ERP and HCM.

Download [DocuSign eSignature for Salesforce](#) from the Salesforce AppExchange.

Certifications and Compliance

Enterprise-wide ISO 27001:2013 certification (highest level of global information security assurance available)

SOC 1 Type 2, SOC 2 Type 2 reporting

PCI DSS and HIPPA compliant

EU Binding Corporate Rules (considered the gold standard for data protection)

EU Trust Service Provider

“**DocuSign eSignature for Salesforce is fast, easy and seamless.**”

Brian Frank
Director Global Enterprise Operations,
LinkedIn

2/ DocuSign eSignature for Salesforce CPQ

Salesforce CPQ (Configure, Price, Quote) is a sales tool that delivers accurate pricing to businesses with any given product configuration scenario. However, generating quotes and proposals can be time-consuming and laborious.

DocuSign eSignature for Salesforce CPQ has all the same features as DocuSign eSignature for Salesforce, plus the ability to send quotes for signature from any CPQ quote object.

Quote-to-Contract-to-Cash

With DocuSign eSignature for Salesforce CPQ, you can accelerate Quote-to-Contract-to-Cash by removing the need for manual handoffs to get contracts signed. Instead, sales reps create a proposal in Salesforce using CPQ, then send it to a customer or other stakeholder for signing. Reps never need to leave CPQ because the “Send with DocuSign” button is integrated into the CPQ user interface.

Tracking the progress of the signature can also be done from inside Salesforce. DocuSign pushes updates from the signature process back into Salesforce CPQ and your quote document record, providing real-time updates on your quote’s eSignatures.

Once signing is complete, the Salesforce business opportunity automatically marks itself as closed.

Download [DocuSign eSignature for Salesforce CPQ](#) from the Salesforce AppExchange.

“When we deployed DocuSign eSignature for Salesforce CPQ, we improved order generation and delivery times by 600% and customer satisfaction by 30% while eliminating compliance errors and missing documents.”

Alan Bronowicz
Head of Business Process
Management & Quote to Cash
Transformation,
Refinitiv

3/ DocuSign Gen for Salesforce & DocuSign Negotiate for Salesforce

DocuSign Gen for Salesforce allows you to automatically generate agreements from customer and deal data within Salesforce. It saves reps time, handles formatting, and eliminates risk of errors from copying, pasting, or rekeying data.

DocuSign Negotiate for Salesforce includes Gen's capabilities plus support for internal and external reviews, approvals, and negotiations. It automatically tracks versions, detects changes, and notifies participants what they need to do next. Reps avoid manually routing and reconciling different versions, while the business gets an audit trail of who did what.

Both products are Salesforce-native apps powered by Lightning (also compatible with Classic).

With Gen you can...

Automatically merge Salesforce customer, product, and pricing data into agreements

Use business rules to drive the inclusion or exclusion of content by factors like geography and deal size

Create templates that include your organisation's branding and formatting

Generate a quote or invoice that includes properly formatted tables

Download from the Salesforce AppExchange and deploy yourself – no hidden fees for professional services

With Negotiate, you can also...

Designate people who can approve, reject, comment or make changes

Detect as redlines all changes made within an agreement, including content that is added, changed or removed

See all document activity, such as when it was created, new versions added, and review status

Maintain a central, version-controlled record of an agreement's changes during negotiation

Which is right for you?

If your agreements do need review, negotiations and approvals, download [DocuSign Negotiate for Salesforce](#) on the Salesforce AppExchange.

If your agreements do not need review, negotiations, and approvals, download [DocuSign Gen for Salesforce](#) on the Salesforce AppExchange.

If you want even more functionality – such as a clause library, customized workflow builder, and a searchable agreement repository – check out DocuSign CLM for Salesforce (on the next page).

“With DocuSign Gen for Salesforce, we’ve seen how we can significantly reduce time spent on manual data entry, allowing us to win deals faster.”

Joe Rapolla
Sales and Marketing
Operations Manager,
NanaWall

4/ DocuSign CLM for Salesforce

DocuSign is a leader in the CLM (contract lifecycle management) category, as recognized by the [Forrester Wave, CLM For All Contracts, Q1 2019](#). Compared to traditional CLM solutions, DocuSign CLM is easier to deploy and easier to apply across a wide range of use cases, offering customers a faster path to value.

Automating the entire contract lifecycle in Salesforce

[DocuSign CLM for Salesforce](#) is integrated with Salesforce Sales Cloud to help organizations automate their entire agreement lifecycle. It's the ideal solution for businesses that require document generation and negotiation plus a centralized contract repository, advanced multi-stakeholder workflows and granular security controls.

With DocuSign CLM, your sellers can stay in Salesforce to do everything they need across the agreement process. Meanwhile, contract administrators and legal teams are able to review, edit and approve from an easy-to-use web application that doesn't require them to have Salesforce licenses. This means your sellers stay selling, while your legal and contract teams can exercise greater control and standardization over language, terms and approvals. The result is faster time-to-revenue, reduction in costs from manual work, and increased renewal rates.

DocuSign CLM for Salesforce includes

Flexible, configurable workflow

Drag and drop over 100 preconfigured tasks onto a canvas to map out and automate agreement processes across multiple contributors, reviewers and approvers

Document generation

Automatically generate contracts with data populated from Salesforce objects, including opportunity and quote records

Automated negotiation

Keep everyone on the same page with collaboration tools that highlight changes, track approvals, and centralize version control

Approval routing

Designate official approvers to approve, reject and comment on agreement content

Centralized search repository

Store, tag and organize all contracts in a single, searchable place, with granular permission controls

Clause library

Your legal team can define a library of pre-approved clauses and fallback options for non-legal users to leverage during negotiation

Rich integrations

Prebuilt connectors and rich APIs enable you to pull-in data and trigger actions in not only Salesforce but also other third-party systems

Best in class security

Category leading security and compliance including: SOC 2, HIPAA, FedRAMP and more

“The ability to quickly find and analyze relevant contract details has helped identify exceptions, risks, and obligations. This new insight means we can proactively change key thresholds, pricing and other deal terms to grow our business faster.”

Dan Baker
Manager of Quote to Cash Operations,
Flexential

Download [DocuSign CLM for Salesforce](#) on the [Salesforce AppExchange](#).

5/ DocuSign eSignature for Salesforce Essentials

For SMBs who use Salesforce Essentials, there's [DocuSign eSignature for Salesforce Essentials](#). This integration enables sales teams to send documents from within Salesforce Essentials, follow their progress through the approval and signing processes, and receive them back quickly. The result is faster turnaround times, a better customer experience, and zero paper.

Built on the Salesforce Platform, powered by Lightning, and available on the AppExchange, DocuSign eSignature for Salesforce Essentials is easy to download, set up, and run – keeping small businesses focused on business rather than administration.

Download [DocuSign for Salesforce Essentials](#) on the Salesforce AppExchange.

“Before DocuSign eSignature for Salesforce Essentials, we had to follow up with clients directly and bother them about outstanding contracts. Now, I can focus on marketing and growing our business rather than administrative paper chasing.”

Russ Feldman
CEO,
Mission Professionals

About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 500,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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