

Automate the generation of customized agreements from Salesforce®

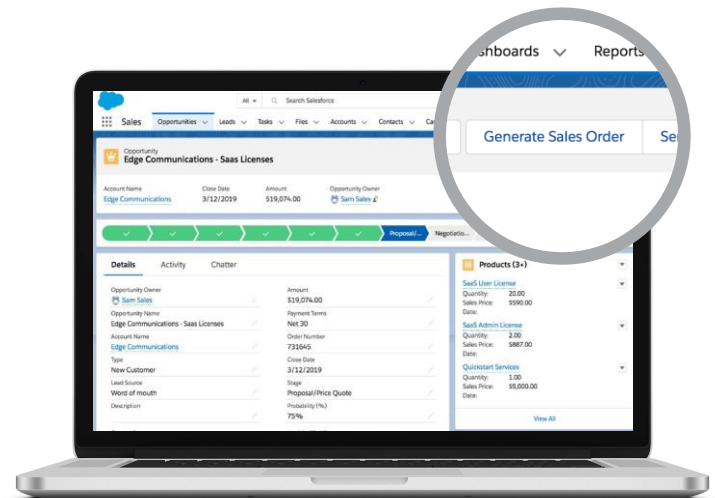
Close more deals faster with DocuSign Gen for Salesforce

Sales reps who manually generate agreements waste time and close fewer deals. Instead of selling, they spend time manually copying and pasting data from Salesforce into sales documents. This is how errors happen. More revisions because the template was out of date. Broken formatting from copying and pasting. Or missing data due to human error. Meanwhile, customers are left frustrated, waiting for final, accurate agreements.

Accelerate the path to “Closed-Won”

DocuSign Gen for Salesforce lets sales reps automatically generate professional, customizable agreements with just a few clicks from Salesforce. Instead of manually copying and pasting Salesforce data into sales documents, then spending time reformatting, reps leverage Gen to seamlessly drive customer, product and pricing data.

Gen can also include or exclude content based on business rules that reference Salesforce data, such as deal size. The resulting document can be sent for signing with DocuSign eSignature (sold separately) and stored back with the opportunity in Salesforce. The entire process can be configured and controlled from Salesforce, saving reps time, eliminating errors, and clearing the path to “Closed-Won.”



Key capabilities

Seamless merging of Salesforce data

Eliminate data entry errors by automatically pulling in Salesforce customer, product, and pricing data.

“Conditional content” that customizes itself

Instead of managing many templates for different business scenarios, use a single template with conditional content. Based on rules that reference Salesforce data like deal size, the correct content blocks are generated together.

Dynamic tables

Generate a quote or invoice that includes properly formatted tables.

Drag and drop template creation

Templates are intuitive and easy to set up with in template previews and pre-configured Salesforce data fields.

Easy to set up and admin-friendly

Admins can download and deploy Gen themselves—no hidden fees for professional services.

Fully integrated with Salesforce and DocuSign eSignature

Automate the agreement process before, during, and after the signature.

How it works

Step 1

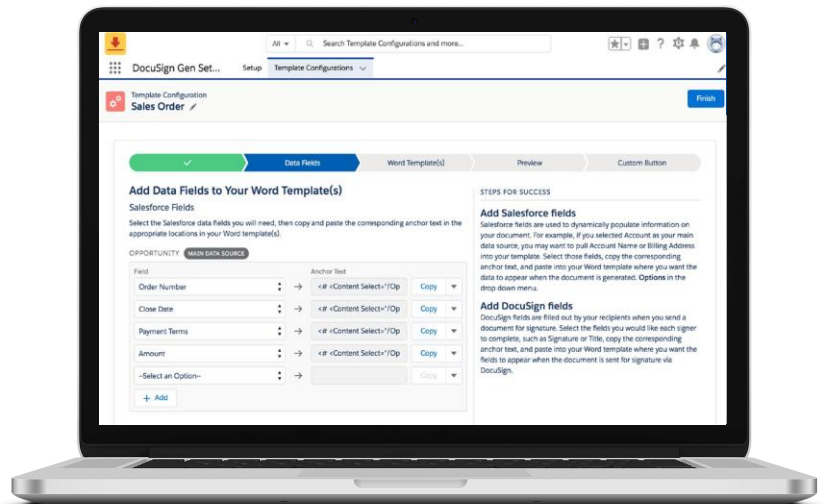
Download and install the DocuSign Gen for Salesforce app from the Salesforce AppExchange. Try out the 30 day free trial.

Step 2

Connect your DocuSign account and configure templates easily with step-by-step guidance.

Step 3

With a few clicks, your sales rep can generate an agreement, which can be sent for signature using DocuSign eSignature for Salesforce.



Automate and connect your agreement processes at every stage of the sales cycle

DocuSign Gen for Salesforce is part of the DocuSign Agreement Cloud for Salesforce, a suite of applications and integrations that automate how agreements are prepared, signed, acted on, and managed—all within Salesforce. DocuSign Gen for Salesforce works seamlessly with DocuSign eSignature for Salesforce so you can do business faster, and with greater accuracy at every stage of the sales cycle.

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