

DocuSign For Salesforce User Guide

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DocuSign For Salesforce User Guide

DocuSign CLM complements eSignature by managing the agreement lifecycle before and after the signature. The CLM platform allows organizations to automate manual tasks, orchestrate complex workflows, and eliminate unnecessary risk.

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DocuSign eSignature for Salesforce, DocuSign Gen for Salesforce and DocuSign Nego-tiate for Salesforce. Each app is configured and managed on a centralized platform in Salesforce. This allows administrators to easily configure, use and manage the many fea-tures and functionalities available. DocuSign Gen for Salesforce is a fast and easy way for users to generate contracts. The app is fully integrated with your Salesforce organization, and pulls details from Sales-force records directly into ...

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users in a Salesforce organization. Salesforce users who are given access to Gen or Negotiate will receive an email stating Action Required - Activate Your DocuSign Account . Users must then click the activation link to finish the user activation process. Once their DocuSign user is active, Salesforce users are able to receive and send doc-

DocuSign Negotiate for Salesforce

Accelerate the contract lifecycle with automated document generation, collaboration, workflow, and a central agreement repository—all designed to work seamlessly with both Salesforce and DocuSign eSignature for Salesforce. In naming DocuSign CLM a Leader in its 2020 Magic Quadrant for Contract Lifecycle Management, Gartner listed CRM integration as a “strength” and highlighted a “high level of integration with Salesforce.”

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Sending Documents for Signature With DocuSign eSignature, getting signatures on a document is quick and easy. You upload the documents you want signed. Then you add the contact information for the people who need to sign and what kind of information they will add, such as a signature, initials, or their company name.

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Working with Templates - DocuSign eSignature User Guide ...

DocuSign allows you to send, sign, and track Salesforce agreements and approvals from anywhere, on any device. All your Salesforce documents are digitized for your records, following rigorous security certifications and standards to ensure your documents are safe and scalable. And best of all, real-time deal updates are provided into Chatter.

DocuSign-Salesforce Integration: Digitize Agreements and ...

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By helping automate the generation, negotiation, and approval of customized agreements, DocuSign Negotiate for Salesforce lets you do business faster. With Negotiate, reps can automatically generate agreements from customer, product, and pricing data in Salesforce. They can also insert or exclude content based on business rules or Salesforce data, such as deal size.

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