Foxit ESIGN

DOCUMENTS GET SIGNED WITH FOXIT ESIGN FOR SALESFORCE®

INTRODUCTION

Foxit eSign, an industry leading legally binding electronic signature solution, is used to **prepare, send, sign, and manage** important digital documents. By integrating the power of electronic signatures through Foxit eSign with the customer relationship management (CRM) strength of Salesforce, your business can automate, simplify, and streamline completion of important documents like contracts, agreements, quotes, and more – **allowing you and your team to focus on sales instead of paperwork**. Not only does Foxit eSign for Salesforce® enable fast and secure eSigning for PDF documents but helpful mapping and merging features can automate tedious data-related tasks. **Businesses of all sizes now have the unique opportunity to complete documents faster and provide a more seamless experience for their customers and teams with Foxit eSign for Salesforce®.**

INCREASE THE EFFICIENCY OF YOUR SALES FORCE

Simplify signing, improve productivity, and optimize costs with a singular, feature-packed electronic signature solution built for CRM needs – Foxit eSign for Salesforce®.

Simplify Document Prep and Signing

- Upload Microsoft Word, PDF, and other document formats quickly from your computer, cloud repository, and Salesforce directories to create your own templates for signing

- Create templates for commonly used forms and documents that require signatures, such as contracts, purchase orders, quotes, and more to use repeatedly

- Map Salesforce fields with templates to populate text dynamically in corresponding single row and multi-row document fields

- Extract and merge Salesforce data into templates from any object such as Lead, Opportunity, or custom tables to save time and reduce errors

- Click "Send with Foxit eSign" to send your quotes, contracts, agreements, templates, and more to recipients in seconds without leaving Salesforce

- Enable customers and leads to sign PDF documents confidently and easily from anywhere, knowing that each signature is legally binding and court admissible

Improve Contract Management

- After creating a new opportunity, create a new quote, generate a PDF, and choose to automatically send that PDF document for signature

- Maintain document eSignature status in Salesforce and automatically update transaction status upon signature completion

- Control document access by mapping to relevant roles within Salesforce

- Automate document generation and sending in Salesforce by triggering the API based on your designated scenario

Ensure Document Security & Compliance

- Rest assured knowing all documents sent and received via Foxit eSign for Salesforce® have the full advantage of our stringent security protocols, including SOC 2 Type 2 compliance, strict network security rules, firewall controls, and 256-bit encryption

- Confidently adhere to compliance regulations knowing Foxit eSign for Salesforce® is fully compliant with ESIGN, UETA, eIDAS, HIPAA, 21 CFR Part 11, and more