

FINANCIAL SERVICES

Industry Insider



See how our partner Foxit tackles challenges in the financial services industry. From big-picture problems, to the specific needs of an IT systems administrator, Foxit has it covered.

Foxit eSign for Salesforce is a seamless solution for creating, editing, automating, and electronically signing PDF documents for highly regulated industries like financial services.



Foxit helps financial organizations like yours.



Easily generate legally binding documents.

Create invoices, quotes, and agreements within your Salesforce CRM cloud.



Access documents anywhere, any time.

Manage sending, signing, and tracking documents directly in Salesforce.



Automate tasks.

Map document fields and merge data in Salesforce to automate document creation and action completion.



Keep reading to learn how Foxit could help a systems IT admin streamline workflows across departments to ensure accurate document tracking and follow-up.

The Solution

Foxit automates and simplifies workflows so businesses can ensure signatures are legally binding.

Streamline document and agreement workflows.

The Challenge: Customizing and managing agreement templates is complex and inefficient, especially when dealing with different needs across teams and Salesforce clouds.

The Solution: With Foxit, you can customize agreement templates and workflows to meet the needs of different teams and clouds with precision and ease.

Efficiently manage documents and agreements.

The Challenge: Managing actions like tracking, reminding, and following up on the completion of important documents for signing can be complex.

The Solution: Foxit makes it easy to send documents for e-signature, track documents, send reminders, download signed agreements, and more, directly within Salesforce.

Get all the compliance you need without sacrificing security.

The Challenge: Managing the security, compliance, and signer authentication of documents can be challenging, and it often requires multiple steps and departments to complete.

The Solution: Foxit is fully compliant with industry security standards and offers a variety of authentication options, including 2FA, MFA, and KBA.

Simplify data mapping for your invoices and quotes.

The Challenge: Integrating Salesforce data with tables can be tricky. If the data isn't properly formatted, it can become truncated or overflow.

The Solution: Using Foxit, you can easily generate documents and populate tables with data from Salesforce, including custom objects and clouds.

The Scenario

In this example, let's imagine how a systems IT admin could use Foxit to simplify document workflows across multiple departments.

Johnny Fox

Systems IT Admin

Johnny must make sure that the intake, credit, and recovery departments have obtained signed financial agreements that contain all the data required for legal and compliance purposes.

His Goals:

- Identify and adopt a digital document solution that works for all departments
- Consolidate and simplify workflows
- Streamline follow-up processes

His Challenges:

- Different teams handling agreement collection in various ways, including mail, email, phone, and paper trials
- No clear follow-up process for pending agreements
- Manual tasks lead to errors and oversights



Foxit solves Johnny's challenges by helping him to:

Simplify workflows.

Foxit eSign for Salesforce lets Johnny tailor agreement templates and workflows to accommodate diverse needs across his various departments — even if they're working in different Salesforce clouds. This saves time because he's confident that all agreements are coming back into Salesforce in a unified fashion.

Streamline the follow-up process.

Foxit eSign for Salesforce helps Johnny and his teams send documents for e-signature, manage documents in one place, and set up automated reminders. Johnny can also download signed agreements directly within Salesforce. Johnny's team is more organized and can follow up on pending agreements more easily.

Map data.

With Foxit eSign for Salesforce, Johnny's teams can easily populate Salesforce data into invoices and quotes with ease and proper formatting. This saves Johnny time by eliminating the need to create separate templates for different agreement types across all departments.

Maintain compliance.

Johnny can rest assured that his documents are compliant, secure, and easy to share. Foxit eSign for Salesforce offers a variety of authentication options, including 2FA, MFA, and KBA, so that Johnny can easily provide the necessary documentation to any department or auditor with just a few clicks.

[Learn more about Foxit](#)