DocuSign Gen for Salesforce

Automatically generate polished agreements with just a few clicks from Salesforce.

Close more deals faster with DocuSign Gen for Salesforce.
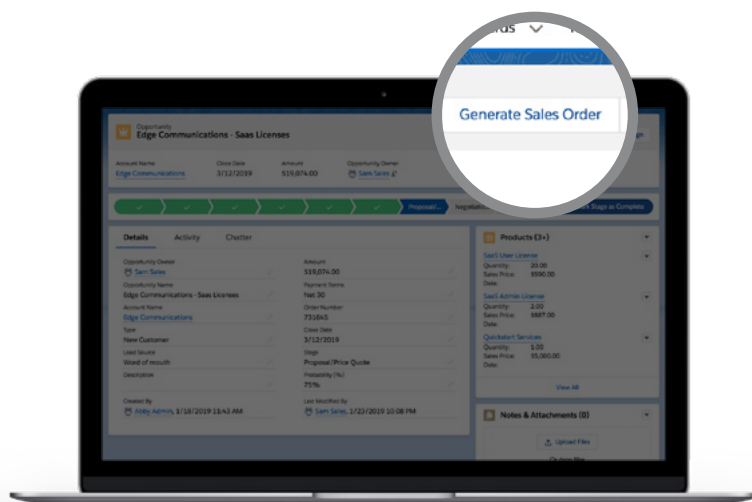
Manually generating agreements wastes time and money. Instead of selling, reps are re-keying data already in Salesforce, using outdated templates, and copying boilerplate language from other systems. These manual activities slow down deals, kill reps' productivity, and introduce human errors. Meanwhile, customers are left frustrated, waiting for final, error-free agreements.

DocuSign Gen for Salesforce lets sales reps automatically generate polished, configurable agreements with just a few clicks from Salesforce.

With Gen reps can seamlessly merge-in customer, product, and pricing data. They can also insert or exclude content based on business rules or 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."

Use Cases

Quotes
Invoices
Proposals
Non-disclosure agreements (NDAs)

Key Capabilities

Seamless merging of Salesforce data:
Create agreements instantly that are error-free and polished.

Pre-integrated with Salesforce (Powered by Lightning) and DocuSign eSignature:
Automate the agreement process before, during, and after eSignature.

Generated agreements editable in Microsoft Word*:
Allow reps, legal reviewers and customers to edit and negotiate in a tool they already know well.

"Conditional content" that customises itself:
Save your reps time identifying and inserting the right content for the right situation. Make it easy for admins to support a single template rather than managing many different templates.

Easy to set up and admin-friendly: Save your admins time and hassle, as reps get up and running without professional services.

Dynamic tables: Generate a quote or invoice that includes a table quickly and easily.
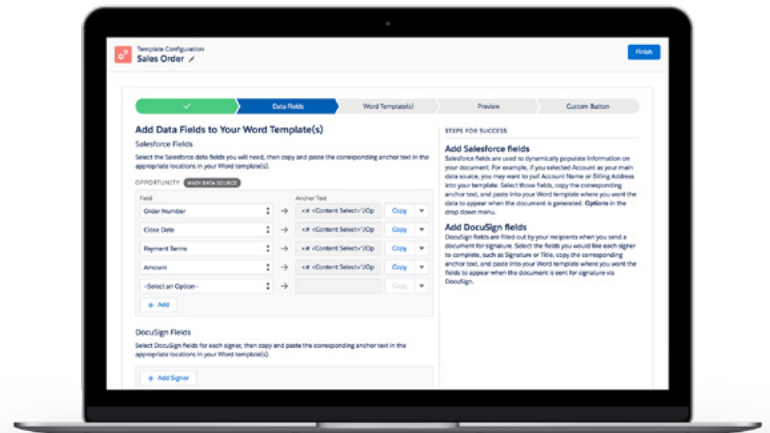
If interested in using Gen, please reach out to your Account Manager or call DocuSign's sales team at +44 (0)203 714 4800.

For more information,
check out the Gen page.

*Additional document editors to be supported in the future.

How it works

1. Download and install the DocuSign Gen for Salesforce app from the Salesforce AppExchange. Try out the 30-day free trial.
2. Connect your DocuSign account and configure templates easily with step-by-step guidance.
3. With a few clicks, your sales rep can generate an agreement, which can be sent for eSignature using DocuSign for Salesforce.