DocuSign®

tipalti

Tipalti closes more deals faster with DocuSign Gen for Salesforce

Tipalti means "I handled it" in Hebrew, and by helping customers automate their accounts payable operations through processing more than $10 billion in annual remittances for 4 million suppliers, the company has certainly lived up to its name. Tipalti's cloud software company is growing significantly, being one of only 61 companies in America who made both the Inc 5000 and the Deloitte Fast 500 for the last two years. As with many businesses, that type of rapid growth exposed inefficiencies in Tipalti's sales process, and the company knew it was time for a change.

Tipalti has long used DocuSign eSignature to speed up the sales contract signing process, but as the company continued to grow, it needed a faster and more efficient way to prepare order forms for customers prior to signature. And Tipalti needed it to all happen in the system sales reps were using most: Salesforce.

Tipalti turned to DocuSign Gen for Salesforce to automate and simplify order form generation so salespeople could eliminate hours of administrative work and focus on closing more deals faster.

70% fewer steps to create an order form

All of Tipalti's salespeople operate within Salesforce, yet the company didn't have a system in place to efficiently utilize that platform's information. Each new sale required manually gathering data from various systems and then finding the right template to build an accurate order form. From start to finish, creating a new form required each salesperson to complete 35 steps. With hundreds of order forms generated each month, the time and cost involved were massive.

"It was slow and frustrating for reps to create an order form," said April Larsen, VP of sales operations at Tipalti. "We also had another problem. If we ever needed to change the template for our order form, it was like heart surgery."

DocuSign Gen for Salesforce allows Tipalti's sales reps to stay entirely within Salesforce, while also eliminating many of the manual, error-prone steps by automatically pulling data from Salesforce to build new contracts. Today, Tipalti's sales orders are prepared in just 5-10 steps.

Results

Before DocuSign	After DocuSign
35 steps for sales reps to create an order form	**5-10 steps** to create an order form — all within Salesforce

In addition, DocuSign has enabled further automation from preparing into signing and then storing the agreement. Here is how the end-to-end process works:

– Tipalti sales rep creates an opportunity in Salesforce, filling out required fields

– The sales rep pushes a button in Salesforce; Gen automatically creates an order form using Salesforce opportunity data

– When the rep is ready, they push another button to send the form to their prospect for eSignature

– The prospect then signs the order form

– The completed order form is automatically attached to the sales opportunity in Salesforce

Salesforce and DocuSign together are now Tipalti's single source of truth. Prior to using DocuSign Gen, sales reps could revise and send a contract from outside of Salesforce, which often resulted in the customer receiving a different version than what was in Salesforce. Now, with Gen, all changes must be made within the Salesforce opportunity and are reflected automatically in both the order form sent to the customer and in Salesforce.

Taking the burden off admins

Beyond the benefits to sales reps, DocuSign Gen has also been a win for Tipalti's admins. Leveraging Gen's conditional content functionality, they can create rules that automatically customize the order-form content. For example, in an order for Tipalti's slimmed-down "express" offering, Gen automatically creates an order form with simplified terms for that product. Having a single template that can vary its output simplifies life for admins: They don't need to manage changes across multiple templates, nor do they need to deal with reps choosing the wrong template.

According to Larsen, Gen for Salesforce has been a unanimous hit with the sales and sales operations teams. "Our sales reps love it because they can get deals done faster, with fewer errors. My team loves it because we can manage templates and make changes much easier than with our previous solution."

To learn more about Tipalti please visit their **website**.

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>
> **April Larsen**
> VP of sales operations
> Tipalti