

Drive Digital Government Transformation with DocuSign and Salesforce

The DocuSign Agreement Cloud extends the value of the Salesforce platform considerably by enabling documents to be generated automatically from data in Salesforce, negotiated, redlined, and routed through complex consent workflows. The DocuSign Agreement Cloud helps organizations accelerate turnaround times, reduce risk, eliminate manual processes, and elevate the constituent experience all without leaving Salesforce.

Prepare documents seamlessly

DocuSign Gen for Salesforce lets users automatically generate professional, customizable documents with just a few clicks from Salesforce.

Get documents signed faster

Provide customers a world-class signing experience while increasing process visibility. Get agreements signed faster with responsive signing experiences for most devices using your personal identity verification (PIV) or common access card (CAC) credentials. Increase productivity and reduce data entry errors by automatically pulling Salesforce data into documents. Signing workflows can be added across the Customer 360—including Sales Cloud, Service Cloud, Revenue Cloud, Experience Cloud, and Vaccine Cloud.

Manage documents from end-to-end

Streamline the document lifecycle by automating manual tasks, orchestrating complex workflows and eliminating unnecessary risk with DocuSign CLM for Salesforce. Generate documents with Salesforce data from predefined templates. Reduce risk with centralized review workflows, world-class external redlining and reviewing capabilities to external stakeholders. Easily archive and search for agreements within our central agreement repository. Native AI capabilities surface hidden insights within agreements and can speed up the auditing process.

Supercharge productivity

Send and sign documents, use templates, and receive notifications right where teamwork happens, in Slack, without losing productivity with DocuSign eSignature for Slack.

Customize the constituent and employee experience

With our Apex Toolkit, your developers can easily create custom solutions for your eSignature for Salesforce configurations. Find code for the methods to call the DocuSign eSignature API. See examples on how to implement common or important workflows. Use self-paced classes or pre-recorded training materials.

Maintain a secure and compliant environment

Like Salesforce, DocuSign eSignature and CLM are authorized at the FedRAMP Moderate Impact Level and are now available in the IL-4 environment to DoD customers. Salesforce customers with the DocuSign Agreement Cloud can be assured that their data is secure.

Common use cases

Licensing, permitting & inspections

- Applications
- Site inspections
- Supporting documentation
- Renewals

Grants management

- Applications
- Grant Agreement
- Financial and programmatic reporting
- Audit

Employee experience

- 19
- Offer letters
- NDA
- Proof of vaccination

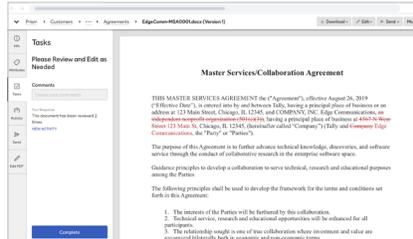
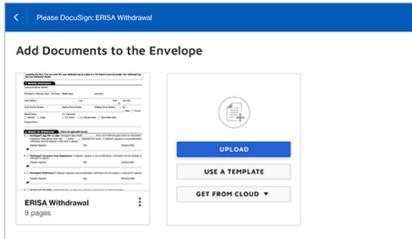
Vaccination management

- Patient consent
- Immunization records request

And more

- FOIA responses
- Privacy Act waivers

How government customers use the DocuSign Agreement Cloud for Salesforce



National Lab digitizing forms

A national lab invested in Salesforce to manage all customer interactions in its tech transfer office. It added the DocuSign Agreement Cloud for Salesforce to digitize common agreements such as NDAs and licensing agreements. This has given users the ability to execute tech transfer agreements from a single user interface.

Modernizing intergovernmental process

A federal agency was looking to modernize its 22 year old legacy system for transferring funds to states for joint state/federal programs onto the Salesforce platform. They implemented DocuSign CLM to allow representatives to negotiate, collaborate, redline and store treasury-state agreements.

Federal agency streamlining procurement

A large federal agency streamlined their procurement process and digitized the associated forms on the Salesforce platform. They also implemented DocuSign eSignature for Salesforce to generate documents with pre-populated information from Salesforce, and route for signature using personal identity verification (PIV) cards.

Get started with DocuSign and Salesforce

To learn more about DocuSign for Salesforce, go to docusign.com/solutions/salesforce
For further discussion, contact us or reach out to your sales representative.



About DocuSign
DocuSign helps organizations connect and automate how they prepare, sign, act on and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

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