

HIGHLIGHTS

Get up and running with e-signatures in minutes with little to no IT involvement at all and customize your application based on your business requirements.

- Drag and drop signature blocks and fields into documents or use text anchors to auto-generate documents
- Advanced custom buttons that let you automate your entire transaction, including signer authentication, with one button
- Use and save templates to automate future transactions
- Track the progress of the digital transaction and receive real-time chatter notifications
- Reduce manual data entry with two-way data flow - to and from Salesforce
- Automatically archive e-signed documents in Salesforce
- Invite prospects and customers to e-sign from your contacts, leads, and users
- Send documents for signature from any standard or custom Salesforce objects
- Easily add e-signatures to custom built apps using OneSpan Sign's APEX SDK
- E-Signed documents include embedded audit trails and tamper-evident signatures that record the entire signing ceremony.

ONESPAN SIGN FOR SALESFORCE

Manage, sign, and track your contracts without leaving your CRM with OneSpan Sign for Salesforce. Choose the most secure, intuitive, and fast way to close your deals by adding e-signatures to your Salesforce documents.

OneSpan Sign for Salesforce is a pre-integrated app that enables sales professionals to prepare, manage, and send documents for e-signature directly in Salesforce. You will not only close deals faster and boost sales productivity, but also enhance the overall customer experience.

Recipients can conveniently review and sign documents from anywhere, anytime, and on any device. By ensuring that the process stays 100% digital, you eliminate manual processing and related errors and costs, ultimately helping you close deals faster.

OneSpan Sign also integrates with the most used document generation and contract management applications inside Salesforce (e.g. Salesforce CPQ and more) to automate the entire document transaction lifecycle — from creating your documents and contracts e-signature — directly from Salesforce

OneSpan Sign for Salesforce handles many different scenarios, including:

- Managing multiple documents and signers with serial or parallel signing processes
- Applying an additional layer of security with authentication methods like email, SMS text code, and Q&A
- Implementing built-in reminders and expiration dates as well as resending signing invitation
- Remote or in-person signing
- Customizing the signer experience across any channel or device, including mobile
- Reassigning the signature to a delegate or another authorized signer

Are You a Financial Institution or a Federal or State and Local Agency?

One Span Sign is designed to work with **Salesforce's Gov Cloud** as well as **Financial Services Cloud**.



Add e-signatures to everyday sales and marketing documents, such as:

- Sales contracts
- Purchase orders
- Statements of work
- Partner agreements
- SLAs
- NDAs
- Customer PR approvals
- Insertion orders



HOW IT WORKS



Select

Upload a document, select a template, or choose a document created from apps like Salesforce CPQ, Conga Composer, and Drawloop



Prepare

Choose your signers and drag and drop signature blocks and fields into your document or use text anchors to automatically generate them.



Send

Invite prospects, customers, and partners to e-sign — anywhere, any time, and on any device.



Track

Monitor the progress of an e-sign transaction in Salesforce and report on their status.

PRODUCT DIFFERENTIATORS



Most flexible solution

- Most deployment options: public cloud, private cloud, or on-premises behind the firewall (for any project size, complexity, or budget)
- Configurable workflows and a wide range of user authentication options and signature capture methods



Highest adoption rates

- Fully white-label the e-sign process and deliver the best signer experience — from simple to the most complex workflows
- Ease of use across channels and devices from 20+ years of best practices



Most comprehensive audit trails

- Static and patented visual audit trails make it easy to demonstrate compliance and prove exactly what was signed and how it was signed



Secure, legal and compliant

- Tamper-evident seal for each signature
- One-click, vendor-independent verification of signatures
- OneSpan Sign meets the highest security standards including SOC 2, FedRAMP and HIPAA

ECOSYSTEM

Our Salesforce ecosystem makes it easy for you to send documents for e-signatures with OneSpan from any of your favorite apps:



OneSpan enables financial institutions and other organizations to succeed by making bold advances in their digital transformation. We do this by establishing trust in people's identities, the devices they use, and the transactions that shape their lives. We believe that this is the foundation of enhanced business enablement and growth. More than 10,000 customers, including over half of the top 100 global banks, rely on OneSpan solutions to protect their most important relationships and business processes. From digital onboarding to fraud mitigation to workflow management, OneSpan's unified, open platform reduces costs, accelerates customer acquisition, and increases customer satisfaction.



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