



OneSpan Sign for Salesforce

Choose the most secure, intuitive and fast way to close your deals by adding e-signatures to your documents without ever leaving Salesforce

HIGHLIGHTS

- Pre-integrated app that allows sales teams to shorten sales cycles with electronic signatures
- Send, sign, and track sales contracts without ever leaving Salesforce
- Automate workflows with advanced custom buttons, templates, e-sign conventions, text tags and more
- Automatically archive e-signed documents in Salesforce
- Easily add e-signatures to custom built apps using OneSpan Sign's APEX SDK
- E-Signed documents include an embedded audit trail and tamper-evident signatures that track who signed, in what order, when, and where with strong identity assurance

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. Eliminate errors and costs related to manually handling paper by keeping the process 100% digital.

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 for e-signature — directly from Salesforce.

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**.



OneSpan Sign for Salesforce handles many different scenarios, including:

- Manage multiple documents and signers with serial or parallel signing processes
- Apply an additional layer of security with authentication methods like email, SMS text code, and Q&A
- Use built-in reminders and expiration dates to track time sensitive transactions
- Remote or in-person signing
- Customize the signer experience across any channel or device, including mobile
- Reassign the signature to a delegate

How it Works

SELECT

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

SEND

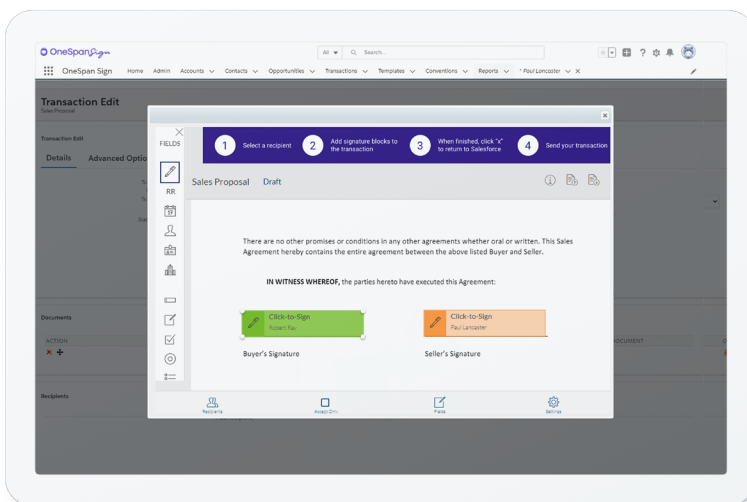
Invite prospects, customers, and partners to e-sign — anywhere, any time, and on any device.

PREPARE

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

TRACK

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



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

- Sales contracts
- Purchase orders
- Statements of work
- Partner agreements
- SLAs
- NDAs



Products 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

A SINGLE, UNIFIED AUDIT TRAIL

- Captures identity verification, authentication, and e-signature events to demonstrate compliance and prove how the signer was identified, what they signed, when, and where

HIGHEST ADOPTION RATES

- Fully white-label the e-sign process and deliver the best signer experience — from simple to the most complex workflows

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:



About OneSpan

OneSpan helps protect the world from digital fraud by establishing trust in people's identities, the devices they use and the transactions they carry out. We do this by making digital banking accessible, secure, easy and valuable. OneSpan's Trusted Identity platform and security solutions significantly reduce digital transaction fraud and enable regulatory compliance for more than 10,000 customers, including over half of the top 100 global banks. Whether through automating agreements, detecting fraud or securing financial transactions, OneSpan helps reduce costs and accelerate customer acquisition while improving the user experience.

Learn more at [OneSpan.com](https://www.onespan.com).

SOCIAL MEDIA



Copyright © 2021 OneSpan North America Inc., all rights reserved. OneSpan™, Digipass® and Cronto® are registered or unregistered trademarks of OneSpan North America Inc. and/or OneSpan International GmbH in the U.S. and other countries. All other trademarks or trade names are the property of their respective owners. OneSpan reserves the right to make changes to specifications at any time and without notice. The information furnished by OneSpan in this document is believed to be accurate and reliable. However, OneSpan may not be held liable for its use, nor for infringement of patents or other rights of third parties resulting from its use. Last Update May 2021.

For information about copying, distributing and displaying this work, contact: info@onespan.com