



Salesforce

DocVerify for Salesforce.com provides a unified interface for all of your document and contract management needs within Salesforce.com itself.

Contracts Made Easy

Ready to convert a prospect into a customer? One click sends them the contract for electronic signature. Need to see a current customer's contracts or other documents? They're right there with the customer's contact info. Want to see the status of all outstanding contracts? Take a look at the DocVerify dashboard.

Send through Salesforce

The DocVerify application easily allows you to send documents to be signed directly from the Salesforce interface. Select a lead, choose which documents to send, and it's sent with the click of a mouse. You can add a custom message and standard DocVerify contract options such as counter-signatures, secret words, passwords, or expiration dates.

Status at a Glance

Easily see the status of your documents at a glance. Sort by contract title, lead name, document status, or any other criteria. Instantly note documents that need a follow-up, and calculate analytics on your documents for any time period. When documents are signed, you'll be notified instantly to keep the sales process going.

Easy Follow-up

Once your document has been sent, it's easy to see your document's progress. Simply click the "Send Reminder" button to follow up with an unresponsive customer. See a complete audit of your document's viewing history, so you can tell if your client is having hesitations about the contract, or just hasn't gotten around to looking at it. You can even easily cancel a signature if you discuss changes to the contract. DocVerify streamlines your entire follow-up process.

E-Vault

Once your documents are signed, they're time-stamped, encrypted, and saved in the DocVerify E-Vault. You and your signers have read-only access to all documents, in one secure location. No more lost documents, no file cabinets, and no disputes over exactly what was signed.

With DocVerify for Salesforce, your contract and document management is more streamlined with less headaches, saving you time, frustration, and money.

Easy to Get Started!

DocVerify is a hosted solution with no software to download, install, or maintain. You can register and upload a document to be signed and managed in minutes.

Salesforce Application Features

- Up to 5 signers per document
- Include a custom message
- Extra-secure or express signatures
- Secret word and password capabilities
- Instantly view status on the signature
- View documents waiting to be signed
- Cancel any pending document
- Send signature instant reminders
- Enter contract and opportunity information