Salesforce Integration Overview

LINKSQUARES

STREAMLINE YOUR CONTRACTING PROCESS AND LEVERAGE KEY DATA

Collaborate more effectively with sales to get agreements drafted, signed, and analyzed by integrating LinkSquares with Salesforce.

Accelerate contract creation and minimize disruptions in the sales process with legal and sales working in their preferred platform. With the **LinkSquares Finalize App in Salesforce**, sales can initiate agreements for your legal team directly from Salesforce that flow into Finalize for approval.

WITH THE FINALIZE APP IN SALESFORCE YOUR LEGAL TEAM CAN:

Speed up contract creation while minimizing disruptions in the sales process with sales working natively in Salesforce to draft new agreements and generate order forms for legal.

Collaborate seamlessly with automatic updates that appear in Finalize and Salesforce simultaneously for legal and sales to track from their respective platforms.

Create better contracts with contract data pulled directly from Salesforce to ensure the details are accurate and complete from its initial draft.

Align the obligations of legal and the speed of sales
Sales can quickly create accurate order forms for Legal without leaving Salesforce with **Pricing Tables in the Finalize App in Salesforce**. Now, legal can get agreements out the door faster knowing they contain the most current pricing details.
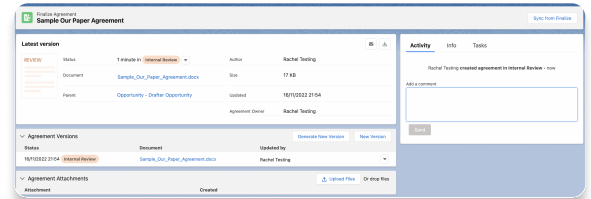
With the **Clause Library in the Finalize App in Salesforce,** sales can utilize pre-approved language to customize contracts.
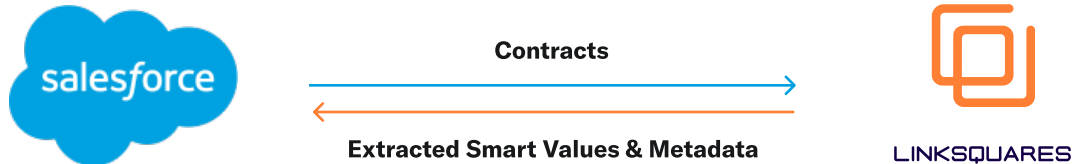
EMPOWER SALES TO WORK IN THEIR PREFERRED TOOLS TO CLOSE MORE DEALS, FASTER

With the **DocuSign Integration in Finalize Salesforce**, sales can send agreements out to DocuSign and track their status all within the tool they're in everyday. Legal and sales can collaborate more efficiently together within their own respective tools to get more deals closed.

Ensure data accuracy between LinkSquares Analyze and Salesforce

Automatically sync contract data back and forth between Analyze and Salesforce to save time and reduce manual, error-prone work. Collaborate more efficiently with real-time insights into relevant contract data in sales' preferred tool.

Contracts

Extracted Smart Values & Metadata

LINKSQUARES

GAIN FULL CONTROL OVER YOUR DATA

Autopull
Automatically pull new and updated agreements from Salesforce into LinkSquares, including those from DocuSign and Adobe Sign.

Autopush
Increase sales' visibility into contracts and push contract data like Termination Date or Agreement Type from Analyze to a Salesforce custom field.

DropZone
Easily drag and drop specific agreements from Salesforce for even more control over which documents get synced to LinkSquares.

Interested in learning more about our Salesforce integration?
Visit our Salesforce Integration webpage <u>here</u>.