

# Salesforce Integration Overview



## 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.

The screenshot shows the LinkSquares Finalize app interface within a Salesforce browser window. The app is titled 'LinkSquares Finalize' and shows a 'Mutual NDA' form. The form includes fields for 'Name', 'NDA Agreement', and 'Requesting Department'. There are also checkboxes for 'Are you transferring our SOC 2 report?' and 'Are you transferring our SOC 2 report?'. The form is currently in a 'Draft' state, and there are 'Cancel' and 'Next' buttons at the bottom.

## 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.

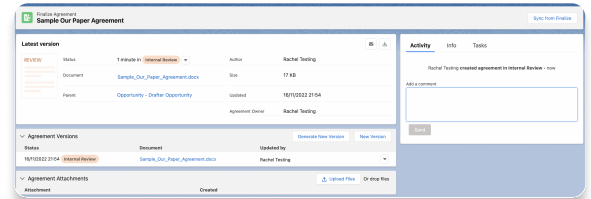
With the **Clause Library in the Finalize App in Salesforce**, sales can utilize pre-approved language to customize contracts.

The screenshot shows the LinkSquares Order Form for LinkSquares. The form includes a table of product lines and pricing details. The table has columns for Product Line, Description, Qty, Unit Price, Product Total, and Comment. The table lists several product lines, including LS Sign, LS Sites, Premium Platform - Analyze, Premium Platform - Onboarding, Read-only User, LS Finalize, and Full Access User. The total product total is \$14,000.00. Below the table, there is a section for 'Additional Terms' and a signature line for the Client, LinkSquares, Inc.

Product Line	Description	Qty	Unit Price	Product Total	Comment
LS Sign		1	\$12,000.00	\$12,000.00	
LS Sites		1	\$15,000.00	\$15,000.00	
Premium Platform - Analyze		1	\$40,000.00	\$40,000.00	
Premium Platform - Onboarding		1	\$10,000.00	\$10,000.00	
Read-only User		10	\$200.00	\$2,000.00	
LS Finalize		1	\$30,000.00	\$30,000.00	
Full Access User		5	\$1,000.00	\$5,000.00	
			Total:	\$14000	

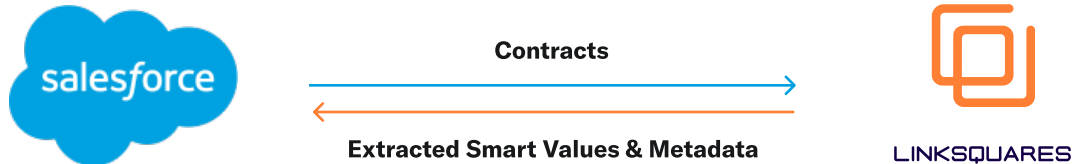
## EMPOWER SALES TO WORK IN THEIR PREFERRED TOOLS TO CLOSE MORE DEALS, FASTER

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.



### 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 [here](#).

