Drive Digital Government Transformation with DocuSign and Salesforce

Tired of cumbersome paperwork and delays in public services? Embrace the synergy of streamlined digital workflows and constituent engagement and unlock government digital service delivery with DocuSign and Salesforce. DocuSign extends the value of the Salesforce platform by enabling documents to be generated automatically from data in Salesforce, negotiated, redlined, and routed through complex consent workflows. DocuSign solutions help public sector agencies accelerate turnaround times, reduce risk, eliminate manual processes, and elevate the constituent and employee experience—all without leaving Salesforce.

Prepare documents seamlessly
Create custom, professional documents with just a few clicks with DocuSign Gen for Salesforce. Stop entering information and save time with document templates that dynamically merge data from the relevant custom or standard object.

Supercharge productivity
Send and sign documents, use templates, and receive notifications right where teamwork happens, in Slack, without losing productivity with DocuSign eSignature for Slack.

Manage documents from end to end
Streamline the document lifecycle by automating manual tasks, orchestrating complex workflows and eliminating unnecessary risk with DocuSign CLM for Salesforce. Generate documents with Salesforce data from predefined templates. Reduce risk with centralized review workflows, world-class external redlining and reviewing capabilities. Easily archive and search for agreements within our central agreement repository. Native AI capabilities surface hidden insights within agreements and can speed up the auditing process.

Customize the constituent and employee experience
With our Apex Toolkit, your developers can easily create custom solutions for your eSignature for Salesforce configurations. Find code for the methods to call the DocuSign eSignature API. See examples of how to implement common or important workflows. Use self-paced classes or pre-recorded training materials.

Maintain a secure and compliant environment
Protect and secure data throughout the agreement lifecycle, with FedRAMP, StateRAMP, and IL4 provisionally-authorized solutions.

Common use cases

- Licensing, permitting and inspections
- Applications
- Site inspections
- Supporting documentation
- Renewals
- Grants management
- Applications
- Grant Agreement
- Financial and programmatic reporting
- Audit
- Employee experience
- I9
- Offer letters
- NDA
- Proof of vaccination
- Vaccination management
- Patient consent
- Immunization records request
- Other
- FOIA responses
- Privacy Act waivers
How government customers use DocuSign for Salesforce

National Lab digitizing forms
A national lab invested in Salesforce to manage all customer interactions in its tech transfer office. It added DocuSign for Salesforce to digitize common agreements such as NDAs and licensing agreements. This has given users the ability to execute tech transfer agreements from a single user interface.

Modernizing intergovernmental process
A federal agency was looking to modernize its 22-year-old legacy system for transferring funds to states for joint state/federal programs onto the Salesforce platform. They implemented DocuSign CLM for Salesforce to allow representatives to negotiate, collaborate, redline, and store treasury-state agreements.

Federal agency streamlining procurement
A large federal agency streamlined its procurement process and digitized the associated forms on the Salesforce platform. They also implemented DocuSign eSignature for Salesforce to generate documents with pre-populated information from Salesforce, and route for signature using personal identity verification (PIV) cards.

Get started with DocuSign and Salesforce
The integration of DocuSign and Salesforce fosters a paperless, agile, and transparent environment, ultimately expediting decision-making and service delivery while maintaining compliance and security standards.

To learn more about DocuSign for Salesforce, go to docsign.com/solutions/salesforce. For further discussion, contact us or reach out to your sales representative.