



Our hearts go out to those affected by COVID-19. During this difficult time, we are focused on the safety and well-being of our families, employees, customers and partners. We are taking appropriate measures to ensure we continue to provide our customers with our services.

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HOW INTELLEDOX ACCELERATES SYSTEMS OF AGREEMENT WITH DOCUSIGN



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What “systems” are in place? What happens to them after they are signed? These questions are behind DocuSign’s **System of Agreement (SofA) platform** – which depends on partnerships with companies like Intelledox.

We talked about this strategy and demonstrated our integration as Gold sponsors of the **DocuSign Momentum conference** in San Francisco June 20-21.

As explained in its exciting Initial Public Offering in April 2018, this new approach is all about DocuSign moving beyond a focus on signatures alone. According to the company’s **SEC filing**:

“We intend to expand our platform to support “systems of agreement” for our customers. These systems would further unify and automate the agreement process by maintaining rich connectivity with other enterprise and third-party systems, taking inputs in the pre-agreement process and generating outputs for post-agreement actions.”

We’re delighted to team up with DocuSign to bring digital transformation to enterprises across their entire agreement process – and make this SofA strategy a resounding success.



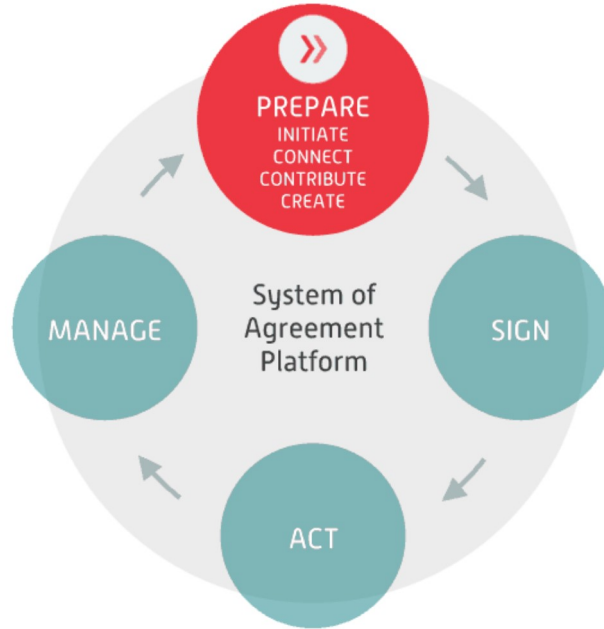
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- Manage existing agreements with secure retention, retrieval and reporting



The idea is to help enterprises accelerate the move to digital and get started quickly where it makes the most sense across customer acquisition, onboarding and service use cases.

USING DIGITAL TO “PREPARE” AGREEMENTS EFFICIENTLY

The most complex step is “Prepare.” No agreement is worth the paper (or electronic device) it is written upon unless all the information within it is accurate and complete. ✘



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Through **pre-built connectors**, Infiniti can automatically pull data from your CRM or other core system and dynamically generate an agreement with the right customer or vendor data, customer-specific terms, products, and price. You can then supplement that data with real-time questions and comments that occur online (such as in a chat interface) and capture those interactions as part of the agreement’s completion record.

Then, you can use that information to **trigger production** of personalized agreements, notices or other communications in real time on demand, via any output channel. With the Infiniti workflow, you can route these communications to the right people for approval and signature.

Customers (or employees or vendors) complete the information you need to collect, then the system assembles that data, connects it with additional data from multiple sources, and hands it all off to the “sign” step in the SofA process. All electronically – eliminating manual steps, paper and inefficient processes.

PLEASED TO ENABLE DOCUSIGN SYSTEM OF AGREEMENT PLATFORM

We are extremely pleased to play a key role in this end-to-end systems of agreement strategy. We’ve seen many joint clients connect **Intelledox and DocuSign** to dramatically improve the customer experience, while speeding time to market and reducing costs associated with developing agreements, contracts, and other forms of customer communications. If you’re using e-signature technologies without a broader view of the entire process of how your agreements are created and delivered.



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