

PANDADOC INTEGRATION



PandaDoc helps businesses create, send, track, and electronically sign essential documents like contracts, proposals, quotes, and invoices. It replaces manual paperwork with customizable templates and legally binding e-signatures

- **Generate Documents from improveit 360** - Create proposals, quotes, contracts, and agreements, automatically populating customer data like Name, Address, Products and Price without leaving improveit 360
- **Improved Sales Cycle** - Generate a proposal in minutes and send electronically for signature, reducing delays between quote creation and deal closure
- **Real-time Data & Improved Accuracy** - Proposals, signatures and data capture is done in real-time. No guessing if the deal closed or if the Rep captured a signature. Contract details are always up to date.

Technical details...

- A paid PandaDoc account is required.
- PandaDoc subscriptions are billed separately from improveit 360
- improveit 360's implementation team will need your login credentials for PandaDoc to complete the integration setup.
- Buttons created for the following objects: Quote, Sale and Project. Any additional Objects would be charged at \$500 per Object and require additional Scoping.
- *Monthly Connector Fee based on usage: \$100, \$200, \$250

Open a [Support Ticket](#) today to request this integration be added to your system