



Salesforce Integration

The fastest way for sales and legal to get deals done

Accelerate Deals

Streamline your entire contracting process to get to "Closed Won" faster

Increase Visibility

Provide stakeholders
always-on access to the
information they need

Automate More

Reduce manual work and minimize opportunities for costly mistakes

Submit requests and generate contracts easily inside Salesforce

Submit tasks or generate and send documents for signature from legal-approved templates with just a few clicks—all without leaving Salesforce or learning a new process.

New Request

Please select the type of request you'd like to submit.

- Order Form
- Automatic NDA
- MSA
- Order Form with MSA
- General Questions

A screenshot of a web application interface. In the foreground, a modal window titled "Lexion Legal Requests (1)" is open. Inside the modal, there is a link "Acme order form" with a blue underline. Below the link, it says "Last Modified ..." followed by the date and time "10/3/2023, 9:53 AM". Below that, it says "Status:" followed by "Counterparty Review". At the bottom of the modal, there is a blue link "View All". In the background, a sidebar is visible with a green progress bar and a main content area with a table header.

**Get task status and legal updates
without leaving the opportunity**

Lexion keeps sales and legal in lock step by surfacing task status, activity logs, message history, signature status, and more inside the Salesforce opportunity. Stay updated without ever having to ask.

SUPERCARGE SALESFORCE CPO

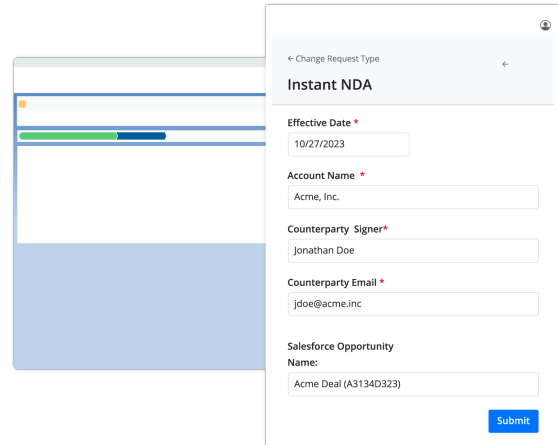
Streamline order form creation, approval and signature, and more with Lexion and Salesforce CPO

Empower sales to generate order forms and other agreements in Lexion from custom quote information in CPQ—and even send for signature automatically. Building templates is simple for legal, too, with Lexion's easy-to-use template builder inside Microsoft Word.

[illegible]

Sync key deal details between Salesforce and Lexion automatically

Eliminate duplicate data entry and minimize errors by automatically sharing crucial information across both platforms. Making a new request? Intake forms pull relevant details by default to make collaborating with legal simple.



← Change Request Type

Instant NDA

Effective Date *
10/27/2023

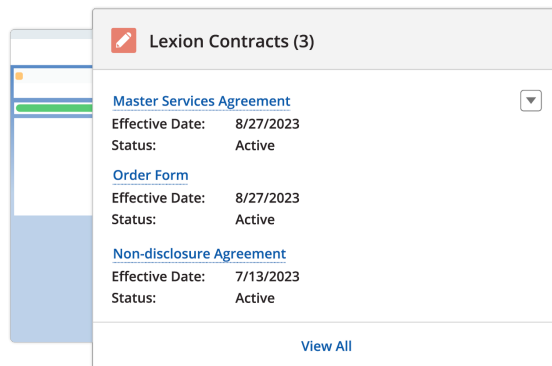
Account Name *
Acme, Inc.

Counterparty Signer*
Jonathan Doe

Counterparty Email *
jdoe@acme.inc

Salesforce Opportunity
Name:
Acme Deal (A3134D323)

Submit



Quickly find related contracts and other important documents

Find and download related contracts from Lexion inside Salesforce in an instant. Waiting on a signature? Agreements attach to opportunities automatically after signature, so you'll have the contract in hand the moment it's signed.

WHY INTEGRATE SALESFORCE AND LEXION



Instant Contracts

Generate contracts from legal-approved templates with just a few clicks



Quick Signatures

Send templated documents for signature without leaving Salesforce



More Visibility

Easily see legal status, recent activity, signed docs and more inside Salesforce



Easy Requests

Submit legal requests with simple intake forms embedded inside Salesforce



Supercharge CPQ

Automate order forms and other agreements with custom quotes from CPQ



Awesome Automation

Share key information automatically between Salesforce and Lexion



Powerful Reporting

Report inside Salesforce using information from inside Lexion



Simple Configuration

Connecting and customizing your integration is simple

Lexion is a powerfully simple operations workflow platform that helps every team do more business faster, by streamlining and centralizing the contracting process in a system that works the way you do. We built Lexion at Paul Allen's artificial intelligence research institute, with an experienced team from Microsoft, Facebook, Google, and Amazon. Top AI investors (including A16Z, Sequoia, and Goldman Sachs) voted Lexion as one of the top 40 Intelligent Applications to watch in 2022. Most importantly, fantastic brands trust Lexion to help them close deals faster, such as Outreach, OfferUp, Blue Nile, and many more.