

signNow

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salesforce

Close the entire insurance claim approval cycle using signNow within your Salesforce account

signNow for Salesforce makes the workflow of any insurance agent more efficient and effortless: from generating pre-filled claim forms to sending them for signing and updating Salesforce records.



Save time generating pre-fill claim request forms

Pre-fill a claim form template with Salesforce record data such as your company's name, address and account details as well as generate a group of pre-filled claim forms in a single click.



Easily create online fillable forms

Upload claim forms to Salesforce and turn them into online fillable forms. Drag and drop text, dropdown, date and signature fields anywhere you need.



Send a claim form or a group of claim forms to customers or agents

Enter recipient emails or export a CSV file of contacts. Specify the order the signers will receive your form. Don't forget to password protect your claim form, set an expiration date and enable reminders for your recipients.



Track the status of claim forms in Salesforce

Check the status of a claim form you've sent for signing without leaving Salesforce. If need be, you can change the signer, cancel a signature invite or change the password to your claim form.



Make the approval process for customers a breeze

Once your customer receives a claim form, they can review and sign it on any mobile device without having to install the signNow app or going to their desktop.



Collect in-person signatures on your iPad or Android tablet

Hand your tablet to customers to instantly collect e-signed claim forms and save time on the back and forth of sending and receiving emails.



Automatically update Salesforce records

Connect the fillable fields of your claim form with Salesforce records. Once a customer adds their information to the fillable fields, their data is automatically transferred to the designated Salesforce record.



Download approved claim forms from Salesforce

Download signed claim forms directly to your device or cloud storage right from your Salesforce account. If you'd like to see all changes made to a claim form, simply download the audit trail log.