



FACILITATE YOUR DOCUMENT FUNCTIONALITY AND STREAMLINE THE APPROVAL PROCESS

READY TO START COLLABORATING?

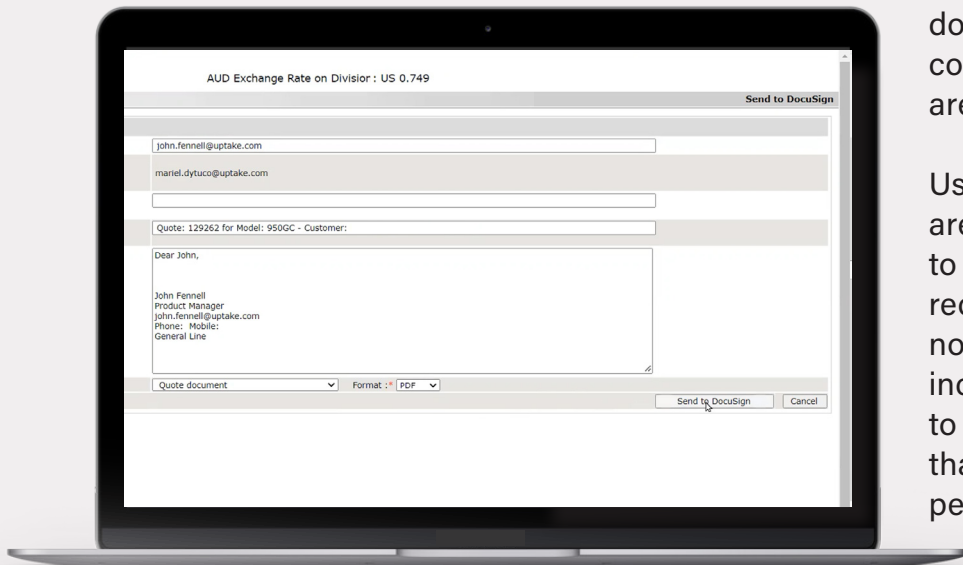
Get in touch with an expert:

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With Texada iQuote, users benefit from an integration with e-signature technology company, DocuSign. Now, dealerships and sales departments have the capability to offer a digital signature option to their customers. iQuote will automatically validate checkboxes are completed before marking the quote as complete. This new feature streamlines approvals by incorporating e-signature technology from a respected leader.

OPERATIONAL EXCELLENCE

SAVE TIME AND INCREASE ACCURACY



With the DocuSign integration, documents are only marked complete when all boxes on the form are checked.

Users are notified when documents are complete and have the option to download the document for their records. If required checkboxes are not completed, the documents are incomplete. Users will have visibility to document status and a warning that the document is incomplete or pending.



BRING E-SIGNATURE TECHNOLOGY INTO YOUR APPROVAL PROCESS



BENEFITS



Improve the User Experience

With iQuote and DocuSign, your company can deliver a user-friendly, accessible, and secure experience with minimal steps and mobile visibility. Save your customers time preparing paperwork and reduce the possibility of lost paperwork.

Streamline Your Process

Manage multiple documents at once with certainty of completion upon signature. iQuote uses DocuSign to scan each document and users are notified upon completion and will have the option to download the document for their records.

Time Efficient

Skip the process of preparing, sending, and signing documents by hand. iQuote easily sends quotes and documents into DocuSign with only a few clicks. Employees and customers can easily complete forms from any location with a device and internet connection.

Increased Accuracy

iQuote uses DocuSign technology to scan every document to ensure each checkbox is completed prior to signing. Documents cannot be completed until all checkboxes are completed. E-signatures can also be verified multiple ways through DocuSign such as email/SMS verification, ID verification, and more. After each signature, an electronic record is generated, which produces an audit trail and proof of agreement.

Integrate with Ease

iQuote and DocuSign support static fields and are configurable with any company that uses DocuSign technology.

TEXADA EQUIPS YOU TO QUOTE WITH CONFIDENCE

Texada knows quoting accuracy and presentation are critical to get the job done. iQuote is known amongst the dealership and equipment sales community for the following benefits:

- Quote confidently and correctly as iQuote is connected to your OEM price lists which includes local or regional variations.
- Generate quotes fast as iQuote fully synchronizes with opportunities in Texada SalesLink.
- Benefit from our industry experience with a quoting system built exclusively for the complexity of the equipment market.
- Retrieve quotes and all revisions instantly as all quotes are captured to have full transparency on what the customer was offered and when.
- Foster accountability into the quoting process as iQuote improves interactions between managers and customers when discussing pricing and configurations.