

Title

PandaDoc's CPQ package on the Salesforce AppExchange

Meet the hero

[PandaDoc](#) is an all-in-one document automation software. It helps customers to easily communicate with customers through personalized, eSign documents, such as proposals, contracts, quotes, and more.

About the client	
Industry	Finance
Headquarters	San Francisco, US
Founded in	2011
Employees	200-800
Website	www.pandadoc.com
Start of the project	April 2021
End of the project	June 2023

The challenge

1. Meeting the technical requirements:

The Salesforce AppExchange has strict technical requirements that need to be met in order for a package to be approved. These requirements may include security and data protection standards, compatibility with different Salesforce editions and versions, and adherence to Salesforce's coding and development best practices.

2. Creating a high-quality package

In addition to meeting the technical requirements, companies must also create a package that is user-friendly, effective, and meets the needs of the target audience. This may involve designing an intuitive user interface, providing comprehensive documentation and support, and ensuring that the package delivers real value to users.

3. Passing the AppExchange security review

All packages submitted to the AppExchange must undergo a rigorous security review to ensure that they meet Salesforce's security standards and protect user data. This review can be a complex and time-consuming process, and it may require the company to make significant changes to its package in order to pass.

The customized solution was intended to handle domain-specific requirements while adhering to best industry practices and complying with standards and regulations. It also was expected to be tailored to the client's brand and their specificities.

Our solution

The Synebo team developed the Configure, Price, Quote (CPQ) package. Following Salesforce's security best practices and guidelines we tested the package thoroughly for vulnerabilities before submitting it for review.

The results

Upon the development and publishing of the CPQ package on the Salesforce AppExchange, the PandaDoc team was able to provide a seamless and integrated solution for document signing within the Salesforce platform. This improved their overall workflow and efficiency and made it easier for their customers to complete and sign documents online.

By integrating with PandaDoc, the package provided users with access to a variety of features and benefits, such as templates, document tracking, and e-signatures. This helped the client streamline their document management processes, reduce manual errors, and speed up the time it takes to complete and sign documents.

The integration with Salesforce also provided users with a more user-friendly and intuitive experience. As of now, they can fill in and sign documents without having to switch between different platforms or tools.

Integrated solution
for document signing

Access to templates,
document tracking,
e-signatures, etc.

User-friendly and
intuitive document
handling experience