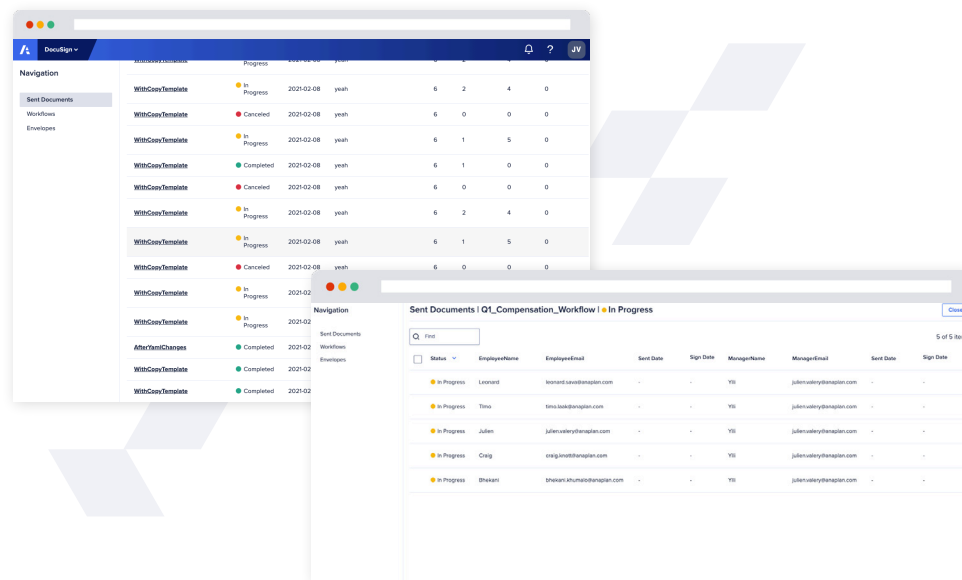# Anaplan

Anaplan Connector for DocuSign

Enhance collaboration within and outside your organization through efficient document workflows

The Anaplan Connector for DocuSign enables users to manage an iterative document workflow within and outside of the organization. The connector combines Anaplan's powerful Connected Planning platform with DocuSign's electronic signing capabilities seamlessly, allowing users to complete business processes like important transactions or contract negotiations with speed, accuracy, and precision. The Anaplan Connector for DocuSign eliminates the hassle of additional training and IT involvement and allows for real-time updates to your documents, speeding collaboration and efficiencies across and outside your organization.

Key benefits

Connect people and data across geographies to improve time to value with real-time tracking and documentation. Track your document's workflow live.

- Empower users to act quickly and complete all assigned tasks in a timely manner with self-service features and capabilities.
- Manage all reviews and approvals electronically.
- Gain visibility into workflow status through embedded tracking functionality.
- Streamline the user experience by eliminating the need for IT or technical teams by managing all of your tasks within Anaplan and DocuSign.

Complete tasks with confidence while adhering to industry-standard security and compliance.

- Collaborate with multiple entities using role-based access and security, managed through SSO.
- Ensure full control of roles and accessibility; enable only designated individuals to review, sign, and approve documents.

Deliver a consistent, unified, and end-to-end user experience that leverages Anaplan's and DocuSign's capabilities and streamlines cross-functional collaboration.

- Enhance the Connected Planning experience by syncing Anaplan to your DocuSign templates.
- Provide a unified user experience across a wide variety of use cases, including territory and quota planning, compensation agreements, invoice processing, offer letters, non-disclosure agreements (NDAs), and more.
- Support transactions inside and outside of the Anaplan platform, enabling users to partner and work with external suppliers, candidates, partners, and more.
- Collaborate internally and externally with a flexible connector structure, eliminating the need for additional training and prolonged integration setup.

Key features

- Seamless connection between Anaplan and DocuSign templates.

- Live and embeddable tracking functionality for document workflows via the Anaplan platform.

- Support for multiple use cases and document types, including territory and quota, compensation agreements, invoice processing, expense reporting, offer letters, performance appraisals, NDAs, and more.

- Ability to easily download and save logs of sent documents for offline review.

- Easily view and manage your envelopes and workflows by deleting outdated and unused ones.

- Ability to select and cancel one or more in-process documents without disrupting other documents.

- Update document status in Anaplan when a document is sent to a recipient multiple times to see the latest status in the Anaplan model.

- Easily track and update the Anaplan model with the date and reason for declined documents.

Anaplan Platform

Security • User Experience • Enterprise Scale • Intelligence • Extensibility • Planning & Modeling

Enterprise scale

The Anaplan platform connects your entire enterprise, scaling as you grow and handling real-time changes at any size. Calculations stay consistent and rapid for all data sets and any number of users.

Extensibility

The Anaplan platform collects and analyzes data in a single location, enabling both high-level and granular analyses and facilitating data-sharing with all stakeholders. APIs, ETL connectors, and built-in integrations easily communicate with other solutions.

Planning and modeling

Our in-memory Hyperblock® engine enables multi-dimensional scenario modeling with unlimited constraints, allowing companies to model even the most complicated business scenarios and stay ahead of changes in the market. The platform maintains 100% consistency across all model changes.

Engaging user experience

The Anaplan user experience puts the whole enterprise on a single platform. Model-building is intuitive and requires zero coding knowledge. The whole company shares real-time data across devices and solutions, enabling rapid decision-making and unprecedented flexibility.

Security

Robust protection keeps your business's data safe. Best-in-class security and compliance include BYOK, role-based access control, user management, SSO support with SAML 2.0 compliance, and data encryption at rest.

Intelligence

Embedded optimization including Optimizer™, over thirty predictive algorithms, and evolving AI capabilities transform complicated input into actionable recommendations. Machine learning intelligence speeds up decision-making across use cases.

About Anaplan

Anaplan (NYSE: PLAN) is a transformative way to see, plan, and run your business. Using our proprietary Hyperblock™ technology, Anaplan lets you contextualize real-time performance, and forecast future outcomes for faster, confident decisions. Because connecting strategy and plans to collaborative execution across your organization is required to move business FORWARD today. Based in San Francisco, we have 20 offices globally, 175 partners, and more than 1,700 customers worldwide.

To learn more, visit Anaplan.com