



Fully automated and streamlined producer onboarding through AgentSync's integrated process: license verification, contracting, and background checks - all in one place!

Built on the Salesforce platform, AgentSync automatically enforces state producer licensing and appointment regulatory requirements. Take your producer management one step further by effortlessly integrating background checks and e-signature into your onboarding process for faster internal workflows and a better producer experience by leveraging our trusted partners:

Smart Producer Contracting and E-Signature with AgentSync

DocuSign®

AgentSync can instantly import an agent's and/or agency's entire NIPR profile by simply entering their NPN: biographic information, contact information, as well as agency FEIN and contact info. Delight your producers by prepopulating the entire producer agreement with information gathered from NIPR and automatically drop the completed agreement in their inbox for signature via DocuSign, the market leader in electronic signatures and trusted by millions around the world.

- Create agreements with NIPR data: Generate agreements using DocuSign templates that automatically pull in documents and customer contacts from AgentSync.
- Customize agreements: Add fields to the electronic agreements with bi-directional mapping to Salesforce objects.
- Send agreements for signatures: Add additional documents and recipients to the agreement and specify send options such as a message, reminders and authentication options.
- Sign on any device: Recipients can review and sign anywhere, anytime and on any device.
- Write back to Salesforce: The signed document and signer-provided data can be automatically written back to Salesforce.
- Compliant and secure: DocuSign eSignature has industry-leading compliance such as FedRAMP and security certifications such as ISO 27001:2013.



Send

Create and send agreements for signature directly from Salesforce



Sign

Customers can sign agreements and make payments from any device



Write

Track agreement status and write documents and data back into Salesforce