

Penneo & Documendo bring your document workflows to a new level

Automate your contract lifecycle from the guided creation of dynamic documents to secure digital signing and mass mailing



How the integration works



Document automation

You can **tailor your document templates** to each specific case, **collaborate with your colleagues**, and **ask for a review** of your documents. Finally, the documents are sent out for secure signing via Penneo and received back in Documendo for storage.



Mass mailing

With the same convenience, you can automatically send the same document to **hundreds or thousands of recipients** for signing or personalize the document for each recipient with merged information. You can also ask the recipients to add information to the document before signing.

With the integration between Penneo and Documendo, you will...

- ✓ Save up to 90% of the time spent creating every document, alone or with your colleagues
- ✓ Minimize errors and improve efficiency and productivity with mass mailing
- ✓ Get all your documents signed securely via Penneo directly from Documendo

Need to collaborate on the creation of a document before getting it signed?

Here are 3 document automation modules to help you build your document:

I need to create a document and send it out for signing

Example: The Sales department needs to send out a contract to a customer for signing



Standard flow



How it works:

1. Start a document flow in Documendo
2. Add the information needed to your document in a guided flow
3. Send out the PDF for digital signing
4. After the PDF has been signed via Penneo by the recipients, you will receive them back signed in Documendo

I need one or more colleagues to add information to a document before it's sent out for signing

Example: The sales, finance, and legal department need to collaborate on the creation of a contract to send out a contract to a customer for signing



Collaborative flow



How it works:

1. Start a document flow in Documendo
2. Send a request to another user to add information to the document - Documendo will send up to 3 reminders to the user
3. After the user adds the information in a guided flow, the document is sent out for digital signing
4. After the PDF has been signed via Penneo by the recipients, you will receive it back signed in Documendo

I need to create a document and submit it for review, to then send it out for signing if the document is approved

Example: The HR specialist needs to create an employment agreement and get it reviewed by the hiring manager before it's sent out to the candidate for signing



Standard flow with review



How it works:

1. Start a document flow in Documendo
2. Add the information needed to your document in a guided flow
3. Submit the document for review by another user
4. If the reviewer approves the document, the PDF is sent out for digital signing via Penneo and received back signed in Documendo; in case of disapproval, the reviewer can add a reason for it for the creator

All these modules can be combined in the same document creation flow.

Need to send out multiple documents for signing?

Check out the 3 mass send-out modules to find the one that best suits your needs!

I need to get the same PDF signed by many different people

Example: The HR department needs to send out a new company policy to all the employees for signature



Mass send out of single PDF



How it works:

1. Upload an Excel file in Documendo containing the recipients' information
2. Upload a PDF to be signed
3. Send out the PDF for signing to all the recipients contained in your Excel file
4. After the PDFs have been signed via Penneo by the recipients, you will receive them back signed in Documendo

I need to get a personalized PDF signed by many different people, with merged data from an Excel file

Example: The legal department needs to send out an NDA to all the partners, and each recipient needs to receive an NDA with their name and SSN and sign it



Mass send out of PDF with merged data



How it works:

1. Upload an Excel file in Documendo containing the information to use as merge data
2. Upload a Word file with merge fields
3. Send out the document for signing to all the recipients contained in your Excel file - the Word file is automatically updated with the merge data from the Excel file so that each recipient gets a PDF with the right information
4. After the PDFs have been signed via Penneo by the recipients, you will receive them back signed in Documendo

I need to get one or more documents signed by many different people after collecting information from such people and have their data added to the documents

Example: You need to request some information from all of your clients (such as their company registration number, or their address) and get the document back signed; or, you need to confirm the up-to-dateness of all of your clients' information (such as name, email, phone number), request additional data from them, and get the document including their new information back signed



Mass send out of PDF/s with data collected



How it works:

1. Upload an Excel file in Documendo containing the recipients' information (or information to use as merge data)
2. Upload one or more Word files with merge fields
3. Send out an information request to your recipients contained in the Excel file
4. Your recipients receive the information request via email. They confirm pre-printed data, add the additional information requested, and finally sign the document/s.
5. After the information has been collected from the recipients, and they have signed the PDFs via Penneo, you will receive them back signed in Documendo