Workflows

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The latest addition to QuickBooks Online Advanced Premium Apps is the *PandaDoc Connector b*y QuickBooks. This is the newest capability in a series of exclusive integrations designed to make QuickBooks Online Advanced a hub for managing all of the workflows that help customers work smarter and grow faster – all from one place.

The PandaDoc Connector by QuickBooks allows QuickBooks Online Advanced users to easily customize vendor or customer-facing forms. It also helps to save time with automated document creation, tracking, and e-signature – all from within a single platform.

A recent Intuit

"This advancement is yet another proof point of how we are enabling mid-sized businesses to benefit from all of the bells and whistles of a customized financial management system that fits their unique needs," said Kelly Vincent, QuickBooks vice president of mid-market small business at Intuit. "The functionality that we are developing on our QuickBooks Online Advanced platform, through connectors like PandaDoc, meets the growing demands of our customers at a fraction of the cost of our competitors."

PandaDoc offers a library of pre-selected, fully customizable templates with drag and drop simplicity, so that customers can create professional and on-brand forms easily, only sharing what's necessary to external partners. PandaDoc also provides enhanced document management capabilities for tracking up-to-date document statuses and collecting legally binding e-signatures to streamline workflow and maximize efficiency.

Key Customer Benefits

- Manage all business document needs in one place.
- Customize existing templates or create and save new ones.
- Auto-fill forms with up-to-date info from QuickBooks Online Advanced.
- Send sales forms with e-signature and payment options.
- Check document status on either QuickBooks Online Advanced or PandaDoc platforms.

The PandaDoc Connector is available at the App Store.

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