

Omniscient + PandaDoc Integration

Omniscient Integration with PandaDoc Gives Competitive Advantage to Organizations for Document Generation



California, San Jose, May 25, 2021 ([Issuewire.com](https://www.issuewire.com)) - Omniscient, a leading total practice management platform for RIAs, financial advisors, advisory firms, broker/dealers, private banks, and other financial institutions, is pleased to announce a new partnership and integration with [PandaDoc](#), the leading all-in-one document automation software. The new partnership provides seamless [PandaDoc](#) integration to all Omniscient plans for those with a [PandaDoc](#) account.

Omniscient aims to integrate a firm's financial business with a client database making the process very simple. With an array of modules to automate 80% of all financial advisory firms' activities, and we just decided to take it a step further.

Introducing [PandaDoc](#), the No. 1 Proposal, Contract, and Documentation Software.

[PandaDoc](#) allows you to create and send documents with an approval system using which you can send documents to designated approvers before sending them to clients to ensure no mishaps. All of this can be done in a wide range of templates to choose from that will suit every taste with eye-catching elements combined with a simple and elegant design. You also get real-time management and activity reports which not only saves you a lot of time but also allows you to get specific details about the activity in your account. To top it all off [PandaDoc](#) has an option for legally binding e-signatures making hand signing documents mundane and your work effortless. If you thought handling your financial business was easy then it just became much easier.

This integration is remarkable because it brings two different worlds together. No longer will there exist a need for bouncing between apps to do multiple tasks, you now can do all of that in a single streamlined setting. Review your data with the power of Omniscient and create and send documents with the abilities of [PandaDoc](#). Never before, has such groundbreaking progress been made in the world of handling the data of financial firms with the added support to send that data after being reviewed, and with the help of e-signatures, you won't have to worry about signing any documents anymore.

"We're thrilled to welcome [PandaDoc](#) on board as a partner via both the Omniscient integration and into the Omniscient App Marketplace," said William Summers, President & COO. "As businesses around the world move into what is a new normal of operation, they are looking for solutions that are more collaborative, more flexible, and more affordable to support their teams to achieve their goals. The [PandaDoc](#) and Omniscient partnership delivers that and so much more to RIAs, financial advisors, and advisory firms."

About Omniscient

Omniscient is built to **integrate a financial firm's business and client data into a single database offering** our users a solution that will automate 80% of their business activities. Artificial intelligence leverages this proprietary database architecture to provide unique business and customer insight and analytics not available from any competitor. By integrating the function and data of critical business tool with the power of portfolio reporting, sales flow, marketing tools, document management, and customer relationship management, using a SaaS delivery approach, we are positioned to deliver a best-in-class solution to the financial services industry serving a large and rapidly growing market.

About PandaDoc

Founded in 2013, PandaDoc is an all-in-one document automation software that streamlines the process of creating, approving, and eSigning proposals, quotes, and contracts. Backed by Microsoft Ventures, HubSpot, Altos Ventures, and Rembrandt Venture Partners, 23,000+ customers use PandaDoc's powerful document creation and workflow capabilities. Using PandaDoc, teams can provide their customers a more professional, timely, and engaging experience. For more information, visit www.PandaDoc.com.



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Source : Omniscient

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