

onflow⁺



Switching to Onflow

What to expect when starting out with Onflow



Importing documents

Getting your old contracts into Oneflow can be helpful to make sure you have all of your contracts in one place. Same place for reminders, for searching for contracts, and when analyzing data.



Individually or in bulk

1. Upload individual PDFs

You can upload individual documents into Oneflow. Simply upload the PDF, and apply any reminders, contact info, or duration periods you'd like to track later in your archive.

2. Bulk upload

If you have a large amount of documents to import, you can also reach out to your Oneflow representative to arrange a bulk import that can be done by the Oneflow team at an additional cost.

We are also currently building an AI Import function which will streamline the import function across your entire portfolio.

Adding users

Get your coworkers into Oneflow

It's as easy as a 2 step process:

1. Build roles

Your Oneflow account comes with some preset roles, but you can also create customized roles to match the unique structure of your organization.

2. Add users

Once you've created your roles, you can add your coworkers and assign them the appropriate permissions. You can change their permission settings at any time.

Tips to make it even easier

Have a really big organization and don't want to apply the roles for each individual user?

Create Groups that have pre-set roles assigned to them, that way when you add a new person, you can add them to the appropriate group, and all permissions will be automatically applied to them.

Or make it even easier, and use our SSO and SCIM integration.

Learn more [here](#).



Creating templates

You have four easy options for creating contracts in Oneflow.

Creating contract templates in Oneflow is fun, fast, and easy. But we know that playing around with the different functionalities and customization tools isn't for everyone, so we have four options to fit your wants or restrictions.

Building templates directly in Oneflow

Use our template editor to build your contracts into Oneflow. Have fun adding interactive form fields, product tables, attachments, and welcome videos. It's easy, dynamic, and customizable to your needs.



Uploading existing PDFs

Building templates directly in Oneflow is the best way to get the most benefit from our available functionality. However, if you're in a crunch, or if you are in love with the existing PDFs you have, you can upload them into a Oneflow contract as well.



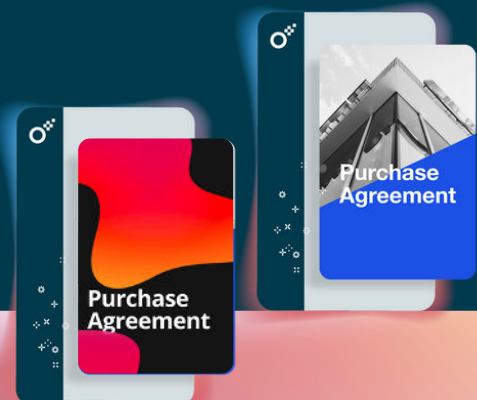
Have us build it for you

While contracts are quick and easy to build in Oneflow, we understand that sometimes it's easier if we do it for you. That's why for an additional fee, our team can build your templates for you.

Reach out to your Oneflow rep for more information.

Pre-made template library

Use our pre-built template library with over 57 ready to use templates. Use it as the base of your content, or just as visual inspiration. Check them out [here](#).





“Onboarding and adoption period was very short - and it integrated very seamlessly with our existing flow”

-G2 Review

Getting your team on board

What to expect when onboarding to Oneflow

We're here to help you and your team get up and running with Oneflow with a variety of different onboarding formats to fit your specific needs.



Webinars & in-app onboarding

We have self-service and on-demand onboarding options across 6 languages.

Webinars cover topics including:

- Getting started as a user
- Account setup
- How to create templates



Personal onboarding

At an added cost, we have 3 different personal onboarding options.

Personal onboarding sessions can include:

- Workshops for contract flow and account structure
- Template conversions
- Support for technical integrations
- User education sessions



Additional educational materials

Education doesn't just stop once onboarding is done.

Additional educational materials:

- Hack videos with expert tips and tricks
- Monthly newsletters with product announcements and tips



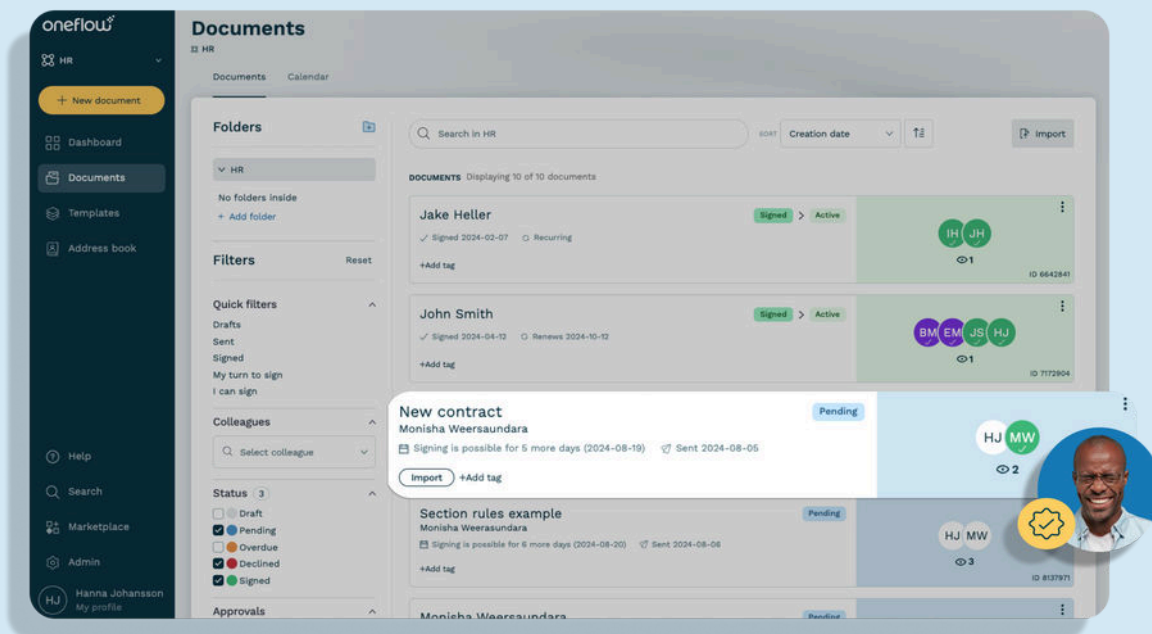
A system you can grow with

Filterable archive

Whenever you create a document, it will be automatically stored in your archive. You can sort through and find documents in the archive using global search, filters, folders, and tags.

Notifications & tracking

Once you send a document, you will automatically receive notifications when the counterparty enters, or leaves any comments.



Integrations

Use Oneflow from your existing systems, or use our buildable API to fit Oneflow into your own software.

Set up integrations on day one on your own, or work with our onboarding team to set it up together.

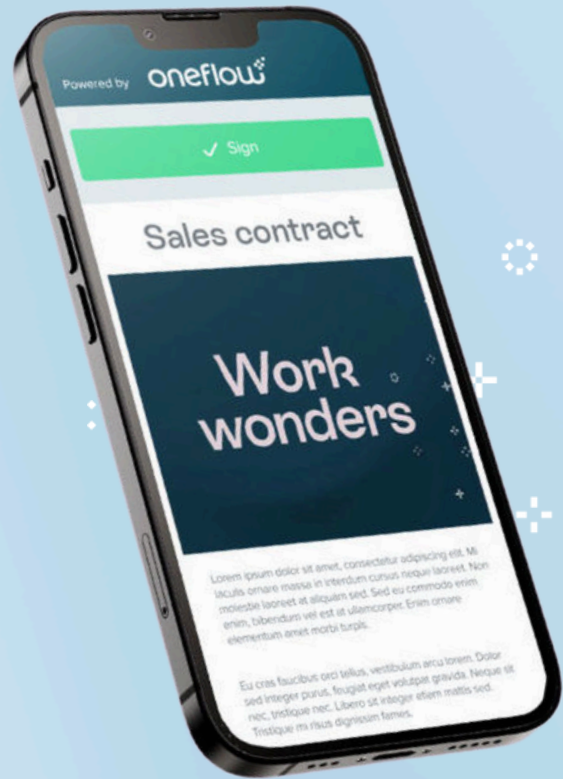


About Oneflow

Oneflow develops, sells, and implements digital contract management and automation systems. Oneflow not only make your teams more efficient by making creating, negotiating, signing and storing contracts easier, but also reduces risk in your contract process and in the fine print itself.

With Oneflow, companies can handle all types of contracts before, during, and after signing digitally within one single platform, automating and streamlining the entire contract management process from start to finish.

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