

Document Automation for Salesforce

Instantly create and deliver quotes, contracts, reports, invoices, and more, right from inside Salesforce.

Why document automation for Salesforce

Your business is under pressure to produce revenue, but busy work distracts your sales team from performing at peak efficiency. Manually creating and sending personalized documents like quotes, invoices, letters, and reports wastes valuable time, causes costly errors, and creates compliance risk.

You need document automation tools that increase sales productivity, accelerate time to revenue, reduce risk, and improve your customer experience — all without leaving the familiar Salesforce environment.

Maximize your Salesforce investment with Nintex DocGen for Salesforce. Keep your team working efficiently and effectively while providing a consistent customer experience.

Accelerate time to revenue

Focus on acquiring new customers, building new opportunities and strengthening relationships, not creating quotes, proposals, contracts, and reports. The easiest-to-use document generation solution on the market increases rep productivity and accelerates time to quote and time to revenue, without coding.

Reduce risk and maintain compliance

Ensure your sales team has the tools to send the correct document to the correct destination — automatically, every time. No more rogue quotes and proposals that expose the organization to risk.

Easy to set up, even easier to use

Using the powerful tools pre-built for you, setting up document templates is done without a single line of code. Need it easier? Use the pre-built templates to start drafting quotes and contracts with a single click. Documents are built right in Salesforce, using Salesforce data, so errors are practically eliminated.

Partner for the long haul

Nintex cares about your document generation experience, during and after purchase, with simple, transparent pricing that delivers rapid time to value. Innovative monthly releases and world-class post-sale support resolve issues fast, so your team is always running at peak efficiency.

Business Benefits*

50%
reduction in proposal
turnaround time

98%
of document fields
dynamically populated

90-day ROI
achieved by 85% of
DocGen customers

37%
increase in rep productivity

\$50,000
per year saved by 80% of
DocGen customers

* Metrics based on results seen by active Nintex customers.

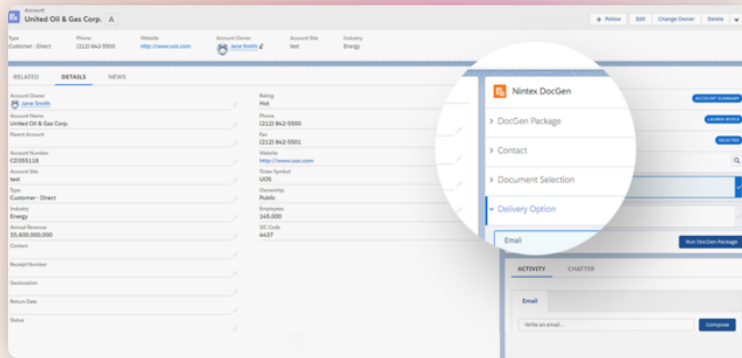


Our Sales team loves how Nintex has improved their jobs and now they can generate a document package with a click of a button. We've also eliminated third-party pricing software, which has saved the company thousands of dollars in licensing costs each year.

David Fidler

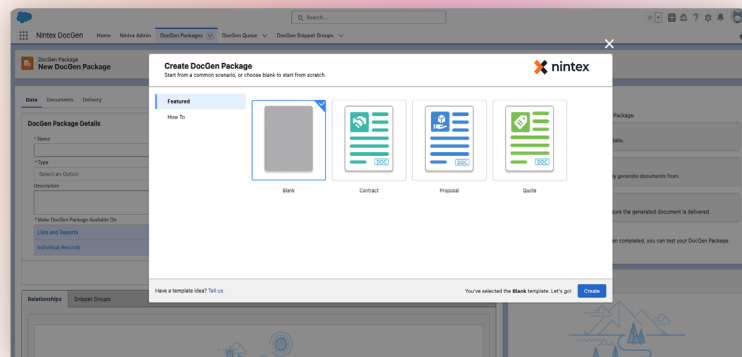
Director of Operations, Cartelligent

Capabilities



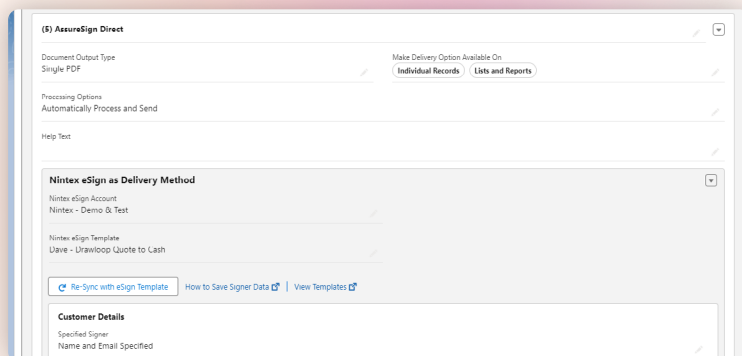
Any document

Streamline critical document-centered processes. Build quotes, proposals, contracts, agreements, MSAs and more directly within Salesforce. Nintex DocGen® includes the data from Salesforce, so the information is accurate.



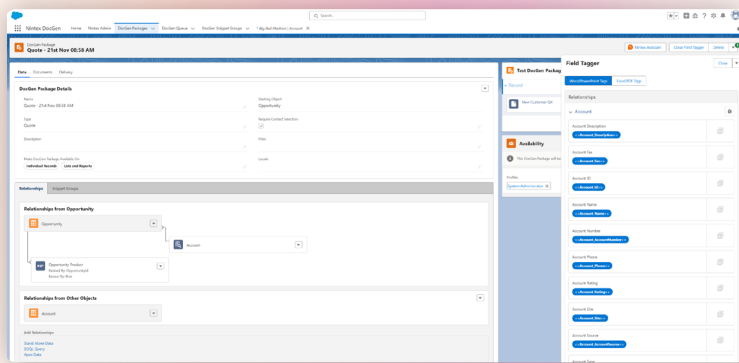
Any template

Create documents using dozens of pre-built templates or build your own with a few clicks. No coding required. What you build in Sandbox converts to production – no need to rebuild the template.



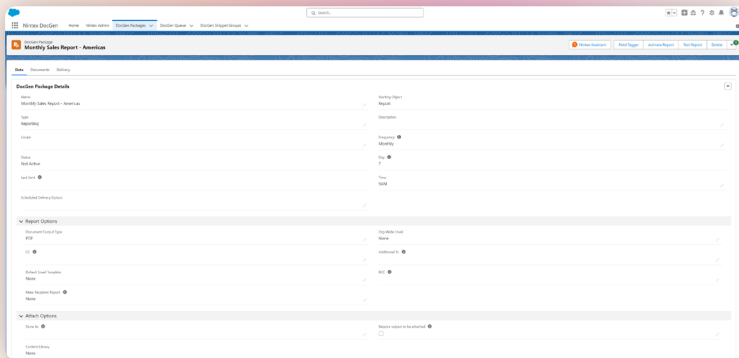
Any delivery

Automate any delivery route, whether you need to streamline reviews, simplify the signing process, deliver via email, or securely store the document.



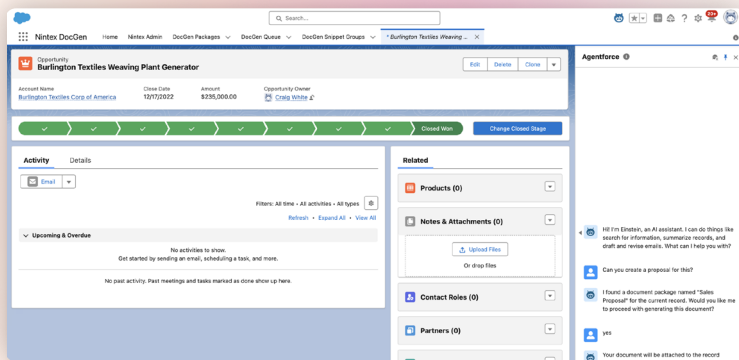
Any data

Merge any data – from Salesforce, other sources, or using pre-built text – to ensure the document meets your needs. No need for cutting and pasting or any other manual content entry.



Any time

Trigger documents on demand or via a schedule, whether a single letter or thousands at a time. Producing personalized documents has never been easier.



Agentforce Connector

Use the Nintex Agentforce Connector to generate documents from simple human language in Salesforce Agentforce.



Learn More

At Nintex, we believe intelligent automation can remove friction from work and inspire teams to build a culture of efficiency that accelerates business success.

For more information about Document Automation for Salesforce, visit
Nintex.com

