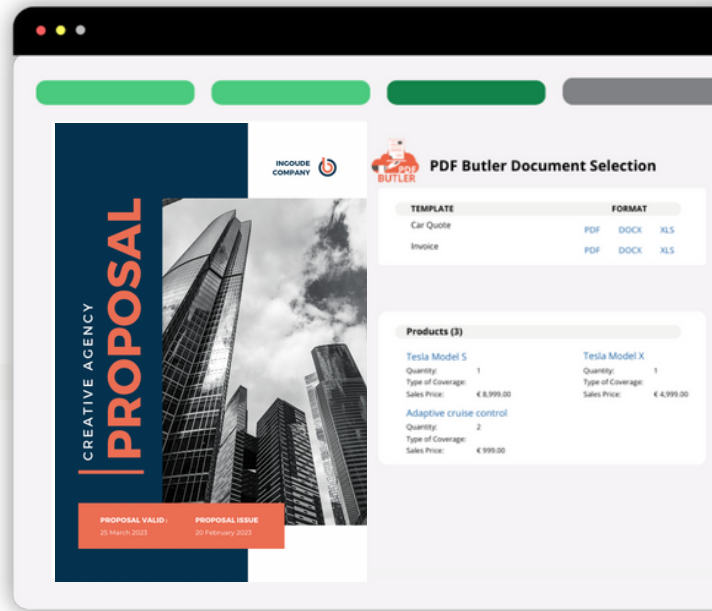




PRODUCT SHEET

PDF BUTLER

Generate, customize, and send your documents for signature in just one click.



How does it work?

3 EASY STEPS



DESIGN

Design your document in Microsoft Word and customize the template as you please.



CONFIGURE

Choose the data sources you want to pull from your Salesforce environment.



GENERATE

Generate and send your document for signature without leaving your CRM.

Key Benefits

- **Customized Documents:** Tailor your documents to fit your unique requirements and branding.
- **Effortless Setup & Maintenance:** PDF Butler's intuitive interface is designed to handle even the most complex use cases.
- **Lightning Speed:** Experience rapid time-to-value with quick template modifications and fast document generation.
- **Multilanguage & Dynamic Assets:** Take advantage of our multi-language functionalities and integrate static and dynamic images throughout your documents.



Product Features

Document Generation:

- **Data Sources:** Integrates with Sales Cloud, Service Cloud, Salesforce Industry Solutions, CPQ, Billing, and FSL. Regardless of your cloud platform, if your data is in Salesforce, we can easily incorporate this into your documents.
- **Conditional Logic:** Empowers users to extract data from any standard or custom object, as well as related lists, within Salesforce.
- **Output Types:** Supports various output formats including PDF, DOCX, Excel, PPT, HTML, CSV, and Email.
- **One configuration, Multiple Templates:** Unlike other doc gen solutions, you won't have to configure each template separately. Configure once, and use across various templates.
- **API Access:** Enables easy connectivity and integration with external systems.

Customizations:

- **Custom Branding:** Personalize documents to reflect your company's identity with custom fonts, dynamic images, and advanced formatting options.
- **Multi-Language and Multi-Currency Support:** Facilitates global operations by providing multi-language and multi-currency functionalities, enhancing scalability.

Other Features:

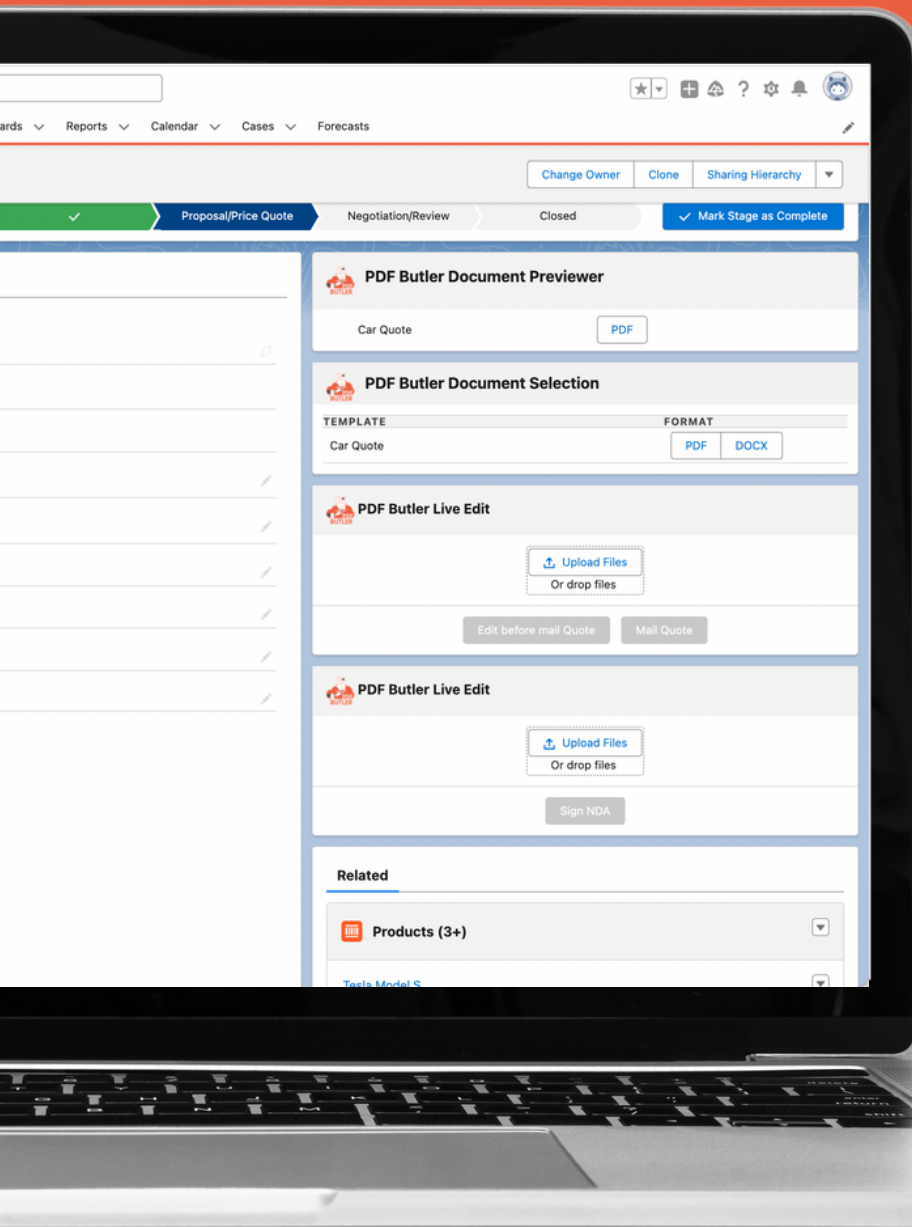
- **Document Previewer and Live Edit:** Allows real-time editing and previewing of documents for enhanced efficiency.
- **Photos in Documents:** Seamlessly incorporates images into generated documents for improved visual appeal.
- **Templates Library:** Access a wide range of templates to expedite document creation.
- **Mobile Enabled:** Ensures accessibility and functionality on mobile devices for increased productivity on-the-go.
- **E-Signature:** Simplifies the signing process with integrated e-signature capabilities via SIGN Butler.

Security:

- **ISO Certified & GDPR, HIPAA Compliant:** Adheres to industry standards to ensure data security and compliance.
- **Data Storage:** Rest assured that all your data is securely stored within your Salesforce environment
- **Custom User Roles and Permissions:** Grants granular control over access and permissions, enhancing security and compliance measures.

PDF BUTLER, RATED 5 STARS ON APPEXCHANGE.

START YOUR FREE TRIAL



Excellent tool for complex PDF generation needs.

The time it takes to create a PDF is much faster than our previous solution, with a better user interface. Would highly recommend PDF Butler to anybody looking for a document generation tool.



Great Product.

I'm a Salesforce consultant, and I've worked with a lot of document generation tools. This has been one of the best I've used, and the team backing it up is fantastic. Their support is top notch.



What a hidden gem!

When I was researching and meeting with the PDF Butler team, the answer to every question "can it do this?" was always "yes." I couldn't say enough good things about this product and their team