

DocStudio for Salesforce: Document Management & e-Signature



Create, send, e-sign, and track documents — all within Salesforce



Data-Driven Documents



Automated Events & Workflows



Smart Document Templates



Data Synchronization

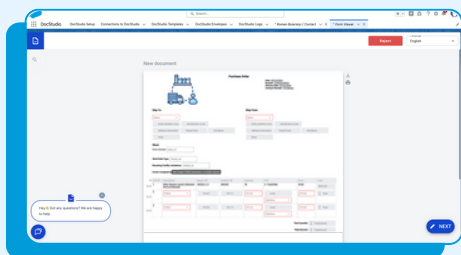


Structured Data Exchange

Simplify every step of document handling in Salesforce with DocStudio's built-in integration. Track, manage, and automate your entire document flow — all in one place.

Create it. Send it. See It Done

DocStudio automatically generates **documents using Salesforce data**. Once created, each document follows predefined workflows such as **approval, e-signature, or routing**.



Every action updates the document status in real time and sends notifications. When the process is complete, **the completed document and related data are automatically synced back to Salesforce**, where they're stored, linked to the record, and available for reporting.

Simple Setup. Precise Control

Create **customizable templates** in DocStudio and link them to **Salesforce objects**, or start with ready-to-use templates from our library.

Map Salesforce fields to **auto-fill documents** instantly, no coding needed.



Use **smart rules** to auto-select the right template, route documents, and trigger next steps based on criteria like deal size or stage. Track every step **in real time within Salesforce** for complete visibility.

Benefits



Grows with Your Business



Integrated or Independent



Digitized Workflows



Increased Productivity



Seamless Collaboration



Full Support



Faster Processes



Reduced Errors

Transform your document workflows — faster, smarter, easier.

Contact us!

www.docstudio.com

hello@docstudio.com