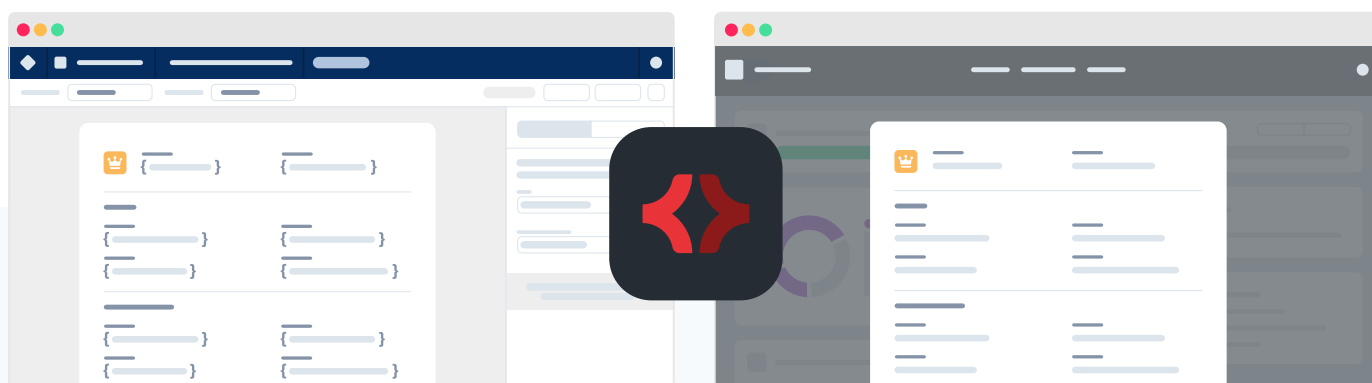


Document generation for modern Salesforce workflows

Generate documents for Microsoft 365 and Google Workspace from Salesforce data in seconds.



Salesforce document generation, easier than ever.

You've invested in Salesforce to centralize your data, but manually creating documents still takes too much valuable time. What if your team could generate polished, data-driven documents without copying and pasting information from Salesforce? What if those documents were automatically stored in their corresponding Salesforce record? What if you could automate the entire process? With Merge Connect, you can.

Merge Connect eliminates manual document creation by generating documents for Microsoft 365 and Google Workspace using your Salesforce data. The Merged Documents component makes document generation effortless. From any Salesforce record, users

can instantly create quotes, proposals, contracts, and more, all dynamically filled with the latest data.

Merge Connect's Template Builder brings an elegant, familiar, no-code experience to a single browser tab, so you can design beautiful document templates without leaving Salesforce.

Using the Automate Merge Flow action, you can automate all of this with Record-Triggered, Autolaunched, and Screen Flows.

With Merge Connect's straightforward setup, you'll be generating documents in 30 minutes! Sign up for our free 14-day trial at appiphony.com/merge-connect.

***The no-code
template builder
is the most
user-friendly
we've used.***

*Luis Blanco,
Strong CRM*





Features

Document Generation

Generate quotes, proposals, orders, invoices, and more using Salesforce data, all directly from the corresponding record page.

- Easy-to-use, no-code template builder
- Generate documents for Microsoft 365 and Google Workspace from Salesforce data
- View generated documents from Salesforce records
- Out of the box support for lists, tables, and images

Automation

The Automate Merge custom Flow action makes it easy to build automated document generation processes that keep your entire org on the same page.

- Record-Triggered Flows
- Autolaunched Flows
- Screen Flows
- Automatically link generated docs to Salesforce records.



Agentforce Ready

Merge Connect offers Agent actions at no additional cost, making it easy to enhance your document generation processes with Agent-authored content.

- Generate documents directly from Agent conversations.
- Embed Agent prompts into document templates for dynamic, Agent-authored content.
- Attach and send generated documents via email directly from Agent conversations.
- Free extension package for Merge Connect customers.



Salesforce Requirements

In order to use Share Connect you must have one of these org editions from Salesforce:

- Enterprise
- Unlimited
- Force.com
- Developer
- Performance

Pricing

Starting at:

\$14

USD
per user
per month

*based on annual subscription

- ✓ Annual & monthly subscriptions available
- ✓ Initial purchase & user add-ons in-app
- ✓ Cancel any-time
- ✓ No minimum user count

Get the Merge Connect app

Install our app from the Salesforce AppExchange and try Merge Connect's free 14-day trial with up to 10 users.



On Salesforce AppExchange

Connect with our team

Contact our sales representatives for any questions that you may have.

apps@appiphony.com
www.appiphony.com