

Document Generation & eSign —

Generate, sign, merge, split, and store documents all inside Salesforce.

Document Generation & eSignature is a Salesforce-native application that creates, signs, merges, splits and stores documents without moving them outside your org. Teams upload a PDF or Word template, map their Salesforce fields to it, and generate a finished document in one click from any standard or custom object.

83% Faster Turnaround

Finalize documents in minutes

5X Higher Productivity

Complete more document workflows

100% Data Accuracy

Auto-fill Salesforce data into every document

One Unified Workflow

Replace disconnected document tools

Why Businesses choose Document Generation & eSignature —

- **One tool instead of four.** All-in-one app to generate, merge, split, sign, track and store documents, eliminating multiple apps to sign, manager or download files.
- **Built for audits.** Signing certificates capture signer name, email, timestamp, and IP address. Add OTP verification and data masking for enhanced compliance.
- **No signer accounts required.** Recipients get a secure link to complete the signing process in a guided fashion. Works on any device.
- **Organized template library.** Create reusable document templates and organize them into folders for faster access and easier document generation.



What it does —

Generate, Store & Manage

- **Generate** from any standard or custom Salesforce object such as Lead, Contact, Opportunity, and Account
- **Store** signed documents automatically in Salesforce, linked to the correct record for easy access and tracking
- **Merge** multiple files into one document package or split large documents into targeted files
- **Wolters Kluwer eOriginal®** eVault integration to securely store and manage digital documents

Send, Sign & Track

- **Send** for electronic signature via secure link, with no external account required for signer
- **Track** who opened, viewed, and signed in real time and send follow-ups with one click
- **Signed** PDFs auto attach to record, searchable and audit ready with signing certificate
- **OTP verification** (optional) and automatic reminders on unsigned documents

4.93/5 customer satisfaction · 1,500+ projects delivered · 400+ customers

From template to signed document, within Salesforce.

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