

FEATURE OVERVIEW

Everything the product does, grouped by capability

01 · Document Generation

Multi-Format Generation	Generate documents from Salesforce data in DOCX, PDF, PPT, and Excel formats.
Bulk Document Generation	Generate documents for multiple records at once, or schedule bulk generation to run automatically.
Dynamic File Naming	Automatically name generated files based on record data or custom naming logic, keeping outputs organized and consistent.
Merge Multiple Templates	Combine different templates into a single, unified output document.
QuickMerge	A lightweight, record-page component that lets users generate documents on the spot — no navigating away from the record to start a merge.
Documents Collection	Group multiple solutions into a single collection or “suite” that can be made available directly on a record layout.

02 · Templates

Multi-Format Template Support	Build templates using PDF Forms, DOCX, PPT, or Excel.
Template Editor	Create, edit, and modify templates directly within the app without needing external tools.
Merge and Edit (DOCX)	Review and edit a generated Word document before finalizing it.
PDF Form Editing	Edit PDF form fields and content before final document generation.

03 · Conditional Logic

If Conditions	Show or hide specific content, sections, or data in a document based on defined conditions.
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04 · Salesforce Data & Integration

Data Relationships

Simple, guided setup to define how related Salesforce data flows into your documents.

Apex Data Relationships

Fetch and merge data into documents through custom Apex classes for advanced or complex data needs.

SOQL Query Support

Use SOQL queries directly to pull the exact data needed into a generated document.

05 · Automation

Salesforce Flow Automation

Trigger document generation automatically as part of Salesforce Flows — no manual steps required.

Scheduled Bulk Generation

Schedule recurring bulk document runs for reports, statements, or periodic recordkeeping.

06 · Communication & Delivery

Email Generated Documents

Email the generated documents directly to one or more recipients.

Custom Email Templates

Design and use custom email templates for document delivery.

Salesforce Email Template Support

Use native Salesforce email templates to send generated documents, keeping messaging consistent with existing org standards.

07 · Platform & Deployment

Experience/Community Cloud Support

Fully supports Salesforce Community/Experience Cloud, so external users and partners can generate documents too.

08 · Third- Party Integration

Third- Party Integration

Smooth Document storage, management and collaboration using third party apps like Sharepoint, Docusign, Conga Sign, Adobe Sign and more.

09 · eSignature

eSignature Support

Generate and Send Documents for signing

Complete Your Salesforce Toolkit

Docs Made Easy pairs naturally with two other HIC Global Solutions products — capture the data, then get it signed.



Create Salesforce Forms

Build branded, intelligent Salesforce forms — capture leads, orders, and records directly into your org, no developer required.

formsmadeeasy.com

Available on AgentExchange



eSignature App for Salesforce

Send documents out for legally binding signature — directly from Salesforce, with full tracking and audit trails.

signmadeeasy.com

Available on AgentExchange

Capture it with Forms Made Easy. Generate it with Docs Made Easy. Sign it with Sign Made Easy.

Built to make document generation simpler, smarter, and fully connected to Salesforce.

docsmadeeasy.com | support@docsmadeeasy.com

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