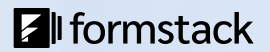


Comprehensive documents solution built for Salesforce



Robust document generation for all your business needs and integrated with Salesforce – from proposals to contracts and invoices.

Generate and automate documents from within Salesforce.

1

Data Mapping

Automatically generate documents with data populated directly from Salesforce records by selecting fields within your Salesforce org to merge fields on document templates.

3

Digital Signature Collection

Use Formstack Sign with Documents for Salesforce to automatically send your Salesforce documents to customers, partners, and employees for signature.

6

Automated Document Generation

Leverage Salesforce document automation tools like Process Builder or Flow to automatically generate documents triggered by events within your Salesforce environment.

2

Data Routing

Easily create rules that let you route data to multiple documents, add conditional logic, and send completed files to third-party software.

4

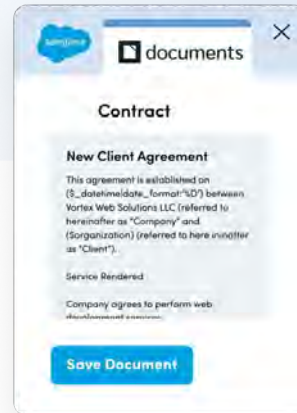
AI-Powered Document Builder

Create document templates in minutes with our powerful, secure AI builder. Simply enter a prompt, and AI instantly generates a ready-to-use template—no formatting required.

5

One-Click Documents

Generate documents effortlessly by adding a custom Documents button to any Salesforce object to create documents based on individual records with a single click.



Automated Document Creation

Powerful Data Mapping

AI Document Generation

“

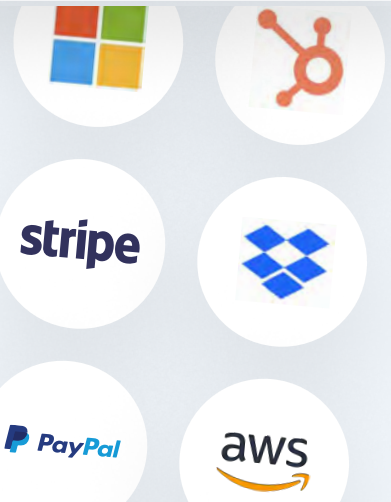
Formstack's Document Generation tool seamlessly integrates with Salesforce, offering compatibility across all Salesforce objects. This seamless integration ensures that users can generate documents effortlessly, regardless of the Salesforce data they need to incorporate. The tool's flexibility caters to a wide array of document generation use-cases, empowering organizations to streamline processes such as contract/invoice/quote creation, proposal generation, and more!

Nick M.

Salesforce Consultant
Salesforce AppExchange

Integrate Documents for Salesforce with leading business software

Easily expand your Salesforce capabilities by integrating with the tools your business uses everyday, from file storage and marketing automation to PCI compliant payment tools.



Formstack Can Solve More For You

In addition to offering a comprehensive documents solution built for Salesforce, we provide a market-first native, no-code forms solution for Salesforce and digital signature.



Securely collect and manage data all within your Salesforce org with our market-first native forms solution. No integration or connectors necessary.



Automate and route forms and documents to customers, partners, and employees to collect digital signatures for all business requirements.