

DocStudio

salesforce

The screenshot displays the DocStudio web application interface. At the top, there's a navigation bar with tabs for 'DocStudio', 'DocStudio Setup', 'Connections to DocStudio', 'DocStudio Templates', 'DocStudio Envelopes', 'DocStudio Logs', and a user profile for 'Roman Rotarski / Contact'. A search bar is also present. The main area is titled 'New document' and shows a 'Purchase Order' form. The form includes fields for 'Ship To' and 'Ship From' (Name, Company Number Code, Identification Code, Address Information, Postal Code, City Name, State), 'Store' (Store Number), 'Product Type' (Product ID), and 'Quantity' (Quantity, Unit of Measure, Price, Total). A table lists items with columns for 'Item ID', 'Product', 'Quantity', 'Unit of Measure', 'Price', and 'Total'. A 'Total Quantity' and 'Total amount' are shown at the bottom. A 'NEXT' button is in the bottom right corner. A chat bubble in the bottom left says 'Hey! Got any questions? We are happy to help.'

DocStudio for Salesforce: Document Management & e-Signature

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

Already using Salesforce?

Simplify client communication with DocStudio's **native Salesforce integration** for seamless **document management**.



Data-Driven Documents

Document creation and processing happen automatically using Salesforce data — no manual entry needed.



Events & Triggers

Automated events and notifications ensure transparency, control, and timely responses across your business processes.



Smart Document Templates

Template-based documents automatically trigger the required steps: data entry, approval, signing, payment, or sending a copy.



Results Back to Systems

Signed documents, statuses, and data are instantly available for analytics or seamlessly transmitted to Salesforce.



Move Data with Purpose and Precision

DocStudio makes every document exchange in Salesforce secure, structured, and trackable — boosting productivity and accuracy.

Built for Every Industry. Ready for Every Workflow

DocStudio powers Salesforce workflows across industries and departments

Banking & Credit Unions



- Digital onboarding with KYC
- Loan agreements & e-signatures
- Approval flows for credit & rates
- Secure delivery of disclosures & statements

Retail and Manufacturing



- Vendor onboarding & contracts
- POs, invoices, and delivery docs
- EDI & Web-EDI
- Price lists & item sheets

NGOs & Non-Profits



- Grant & partner agreements
- Staff/volunteer/participant onboarding
- Public forms & compliance docs
- Donor acknowledgments & receipts

Healthcare



- Patient forms & consents
- Staff onboarding & credentials
- Invoicing & claims automation
- Policy updates & internal memos

HR & Payroll



- Offer letters & contracts
- Onboarding & HR forms
- Payroll & time-off approvals
- Performance reviews & exit docs

And Many Others



- NDAs, MSAs, public web forms
- Multi-party approval flows
- Audit-ready document trails
- Customer questionnaires & surveys

3 Simple Steps to Get Started

Connect Salesforce with DocStudio and turn your Salesforce into a smart document engine. Send, sign, and track documents — without leaving your workflow.

Step 1

Create your DocStudio account

Unlock templates, workflows, and secure storage.

Step 2

Install the app from Salesforce Marketplace

Quick deployment, no code required.

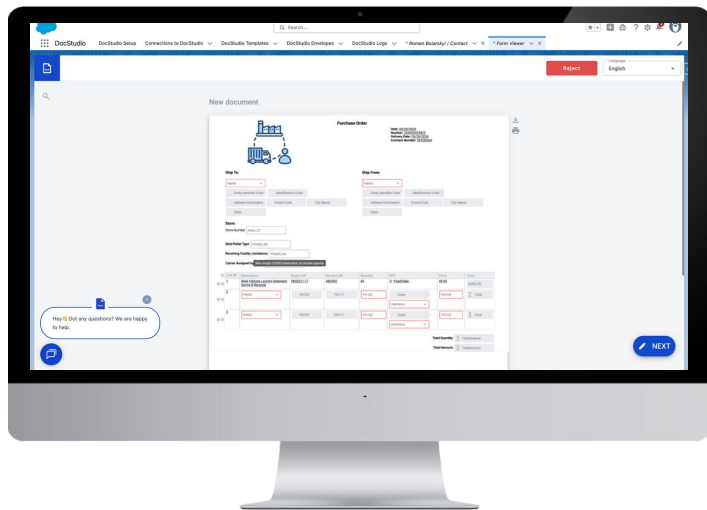
Step 3

Configure to fit your process

Tailor templates and logic to your business case, or use predefined templates.

All Done!

Start sending documents right from Salesforce. Create, approve, e-sign and manage seamlessly.



You launch — we deliver.

Recipients handle documents via browser or integrations.

Simple Setup. Fine-Tuned Control

Get started fast in Salesforce and customize as you go — templates, fields, roles, and business rules — with full flexibility.

- **Customizable Templates**

Build your own customizable templates in DocStudio and connect them to Salesforce objects, or jump-start with our default template library. Tailor layouts, fields, and workflows to match your exact business needs.

- **Easy Field Mapping**

Map Salesforce fields (like Account, Contact, or Opportunity data) directly into your templates. Data flows instantly from Salesforce, auto-prefilling document fields so users don't need to re-type anything. No coding required — just point and click.

- **Smart Rules & Workflows**

Set rules to auto-select the right template version, route documents to the correct people, and trigger the next step in Salesforce. For example, send NDAs to Legal, contracts to Finance, or route approvals automatically based on deal size.

- **Track Events**

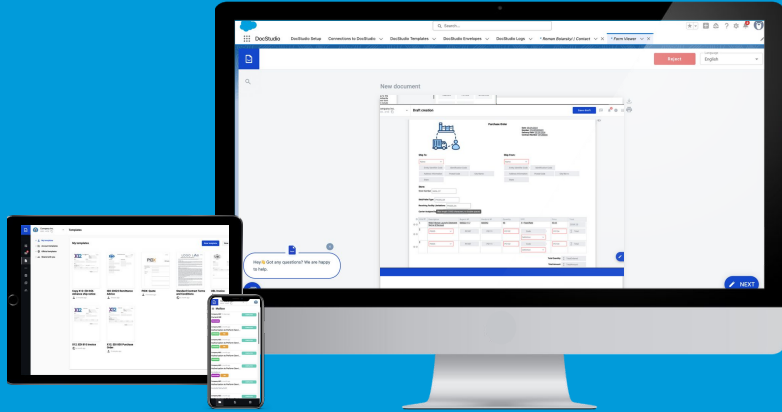
Monitor every action with real-time logs inside Salesforce. Gain full transparency on when documents are created, sent, signed, or completed.

The image displays two overlapping screenshots of the DocStudio application interface. The background screenshot shows the 'Test template' configuration page, specifically the 'Field Mapping' section for the Salesforce object 'Contact'. It features a table with columns 'DocStudio Field' and 'Salesforce Field'. The table contains four rows: 'Number' (with min/max values) mapped to 'Number', 'Checkbox' mapped to 'Checkbox', 'Date 2' mapped to 'Date', and 'Date' mapped to 'Date 2'. A 'Back to List' button is at the bottom left. The foreground screenshot, titled 'Form Details', shows a preview of a 'ROMAN TEST TEMPLATE'. It includes input fields for 'Subject' and 'Message', a 'PARTICIPANTS (ROLES)' section with roles like 'Sender', 'QA', 'Developer', and 'Manager' (each with an 'Approve' button), and a 'Create Form' button at the bottom right.

Create it. Send it. See It Done

No more manual docs, copy-pasting, or chasing signatures.

- fewer errors,
- no routine paperwork,
- faster results.



DocStudio App for Salesforce

DocStudio App transforms Salesforce into a full-cycle document automation platform, where your Salesforce data drives the creation, delivery, and signing of documents in a single, seamless flow.



Integrate

Map Salesforce fields to DocStudio templates. Trigger signing workflows, approvals, and archiving without switching systems.



Automate

Generate contracts, invoices, agreements and other documents from Salesforce records in one click.



Accelerate

Track document status in real time. Ensure faster approvals, fewer errors, and full compliance with legal e-signatures.

Benefits of Native Document Automation in Salesforce



Enterprise-Grade Document Automation

DocStudio is your complete platform for generating, sending, signing, and managing documents. Built for scale and flexibility across departments.



Integrated or Independent

Use DocStudio directly inside Salesforce or connect it to other systems like ERP, HR, TMS or procurement tools. Real-time data merge and two-way sync keep everything aligned.



Digitize Manual Workflows

Automate sales quotes, onboarding docs, NDAs, contracts, vendor forms, invoices, POs, and more, without switching between tools.



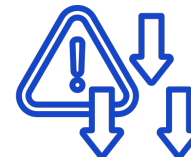
Boost Efficiency & Digital Experience

Drag-and-drop templates, built-in eSignatures, workflow automation, and full status tracking help streamline processes and deliver a smooth user experience.



Flexible Collaboration & Full Support

Work with your in-house team, your Salesforce consultant, or let us step in. We support you every step of the way, full-cycle or split delivery, you choose what works best.



Faster Processes, Fewer Errors

Eliminate repetitive tasks, reduce delays, and boost accuracy by pulling real-time Salesforce data into auto-generated documents.



Streamline operations, reduce manual work, and improve user experience.

DocStudio: The Engine Behind Seamless Salesforce Document Workflows

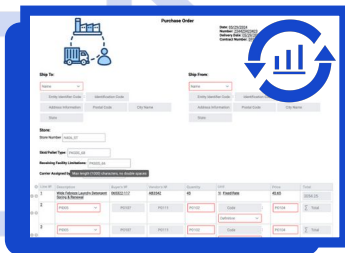
DocStudio gives Salesforce users the tools to build, automate, and manage documents with ease



Template Editor

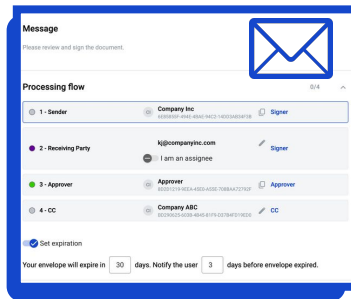
Quickly create and customize professional document templates for contracts, NDAs, quotes, onboarding forms, and more.

Add dynamic fields, e-signatures, required inputs, and auto-fill Salesforce data to save time and reduce errors.



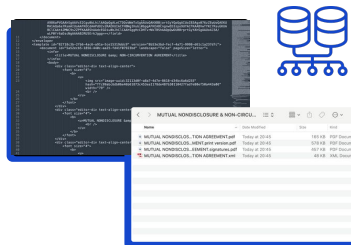
Data Mapping & Conversions

Automatically pull Salesforce data into documents and format it the way you need. Perfect for invoices, purchase orders, and compliance documents — with built-in validation to keep everything accurate.



Business Logic & Scenarios

Automate who reviews, approves, or signs documents — and in what order. Set up flexible workflows with approvals, notifications, and routing so the right people are always in the loop.



Seamless Integrations (API)

Connect DocStudio with Salesforce and other business systems. Trigger document flows, sync data in real time, and track every status update securely.

About DocStudio

DocStudio provides a comprehensive document automation and digitization solution designed for businesses of all sizes across various industries.

With over **17 years** of experience, we've been digitizing and facilitating data processes across different domains, including e-Invoicing, Document Management, Supply Chain, Procurement, B2B sales, Logistics, and Cash Flow Management.

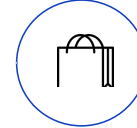
At DocStudio, we proudly oversee **13,000 customer accounts**, facilitating **800+ million transactions annually**. Our services extend to customers in the United States, Canada and Europe.



Fintech



IT



Retail



Healthcare



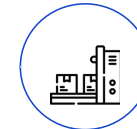
Logistic



Gas & Oil



Utilities



Manufacture



Agriculture



Telecom

Trusted by:



PEPSICO



Ready to streamline your document processing?

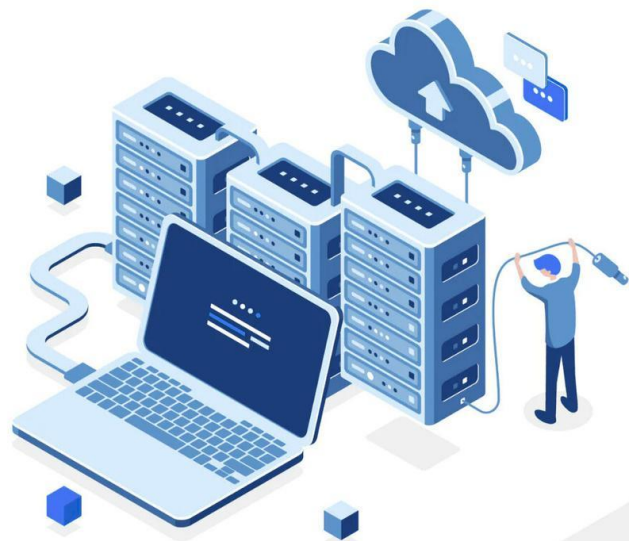
Contact us



+1 (415) 890-2097



hello@docstudio.com



★★★★★

DocStudio e-document management services have significantly boosted our operational efficiency. The seamless integration and user-friendly interface make working with the platform a breeze.



PepsiCo, Inc
★★★★★

DocStudio has truly been a valued partner in the realm e-document management services. Their expertise and support have played a crucial role in optimizing our processes. We appreciate the dedication and excellence that DocStudio Team brings to the table.



★★★★★

DocStudio document management and data exchange services have been a game-changer for our operations. The platform is straightforward, efficient, and has significantly improved our processes.

