

Automated Document Generation

WITH 123FORMBUILDER & SALESFORCE



Purchase Order Management Form

Date:

MM/DD/YYYY



Month:

Please select

Supplier:

Code:

Category:

Please select

Description:

Documents That Build Themselves

Every organization is made of different pieces and processes that work together to achieve a common goal. As they grow, aligning processes, optimizing efficiency, and automating document generation become increasingly complex and critical to operational success.

Create and automate business documents – from contracts and agreements to custom PDFs, directly from your Salesforce data. Eliminate manual entry, reduce admin time, and lower the risk of human error across departments and industries.



Custom Templates That Fit Your Workflow

Design documents that work the way you do. Use our editor to build standard or complex PDF form templates with custom fields, conditional logic, product fields, payments, and layouts tailored to your business. Set it once, reuse it whenever you need.



Real-Time Form Prefill with Salesforce Data

Send out pre-filled forms using the data you already have in Salesforce. No manual typing, no guesswork – just accurate, ready-to-sign documents sent to clients or partners in seconds.



Digital Signatures & Terms of Service Fields

123FormBuilder has built-in Digital Signature and Terms of Service fields that make it easy to get approvals, agreements, or legal consents directly within the document, without leaving the form.



Smart Notification Workflows

Design custom notification routes that send documents to the right people or departments within your company, informing those responsible to take action. Set up rules to notify stakeholders when it's their turn to act – no more email chasing.

Your Salesforce Workflow



Create Digital Forms

Skip the clipboards and printers. Use digital forms to collect data, automate document creation, and keep everything synced with Salesforce. It's faster, cleaner, and audit-ready.



Automate Document Generation

Use the editor to record various types of information digitally. You can later automatically access them and build a wide range of business documents to set up automated workflows with.



Capture Electronic Signatures

Use the Digital Signature field to automatically get signatures on a business contract, patient consent for treatment, or to sign a partnership agreement.



Connect to Any Salesforce Object

Collect information through a form, link it to any Salesforce object – standard or custom – and instantly generate a document. Automatically redirect it to the person who needs to sign it. From patient consent to signed contracts, it all happens in one flow.

Need help setting up your document automation?

Find us on the Salesforce AppExchange



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www.123formbuilder.com