

Everything you need to get your documents done within Salesforce

Turn Salesforce data into motion. Launch document workflows from Salesforce objects, generate and route documents without code, collect eSignatures, and write results back to fields and Files—all from one platform.

 altaFlow

 salesforce

What You Can Automate in Salesforce

Launch from Any Object

Start workflows from an Opportunity, Quote, Account, Contract, or even custom objects.

Generate Documents without Code

Merge Salesforce fields into intelligent DOCX or PDF templates with conditional logic.

Automate Complex Approvals

Route documents for approval based on Amount, Stage, Product, or any custom field.

Collect Legally Binding eSignature

Send documents for eSignature with automated reminders and expirations, all included.

Write Back to Salesforce

Attach final PDFs to Files and automatically update fields, keeping Salesforce your single source of truth.

Connect your systems

Populate documents with data from Salesforce records and other data repositories.

Better together: Salesforce + WorkFlow

With WorkFlow for Salesforce, users across organizations achieve the following results:

40%

Reclaim up to 40% of the hours spent on completing tasks manually

3h

Unlock up to 3 hours of a workday & put it towards driving business growth

10x

Implement fully-automated Salesforce document workflows up to 10X faster

Key features

- Easily generate and send packages of documents in different formats – PDF, DOCX, web forms, and Spreadsheets – pre-filled with Salesforce data.
- Enable multiple parties to collaborate on documents faster using online redlining.
- Establish conditional routing for documents between contacts, including internal and external recipients.
- Generate batches of documents and send them out with a single click.
- Create or update existing records based on data entered into a document's fillable fields.
- Eliminate data silos by integrating across additional storage systems you use like Google Drive, SharePoint, OneDrive, and others.



Turn document busywork into automated workflows. Try altaFlow today!