

CloudCrossing BVBA
BE0676.494.529
Dahlialaan 1
Belgium



PDF BUTLER

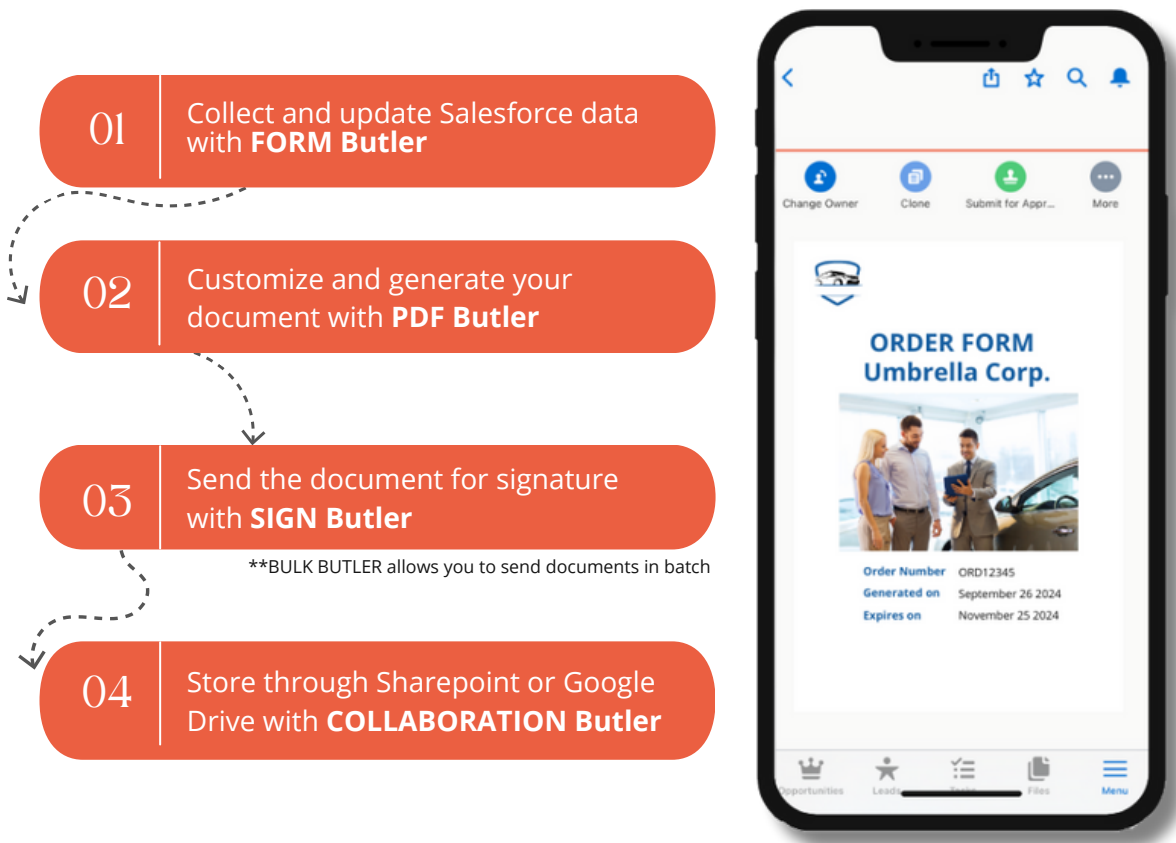
PRODUCT SUITE OVERVIEW



1. INTRODUCTION

Introducing PDF Butler's comprehensive product suite, designed to revolutionize your Salesforce document processes. Our solutions seamlessly integrate within Salesforce, providing a native look and feel that ensures a cohesive user experience at every step – from data collection to document generation, signatures, collaboration, and storage.

In this overview, we'll explore how our products work together harmoniously, optimizing your productivity, cutting down on costs, and boosting efficiency. Regular updates and unmatched support ensure you stay ahead with the latest features, while seamless Salesforce integration provides a hassle-free experience for you and your team.



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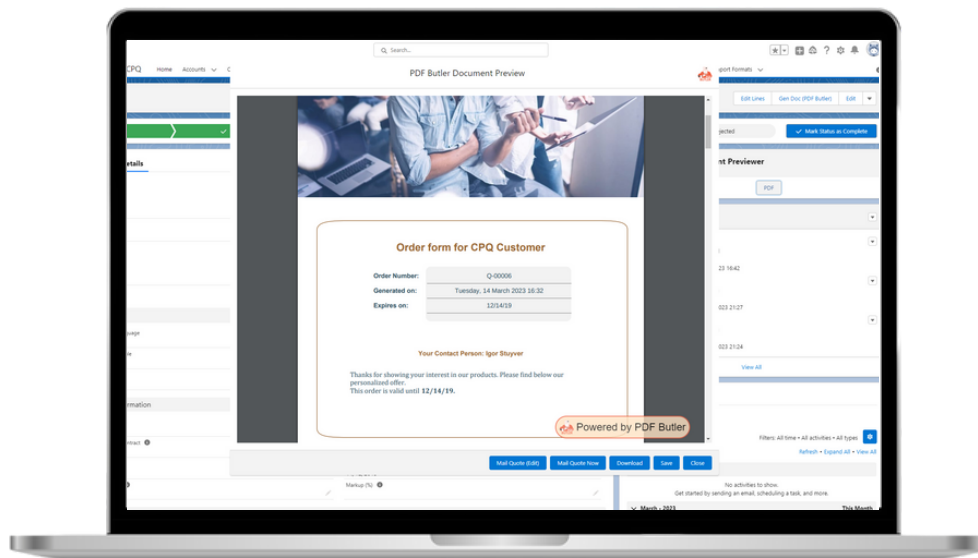
YAMAHA

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2. PDF BUTLER

Lightning-fast Salesforce document generation with unparalleled customization



PDF Butler simplifies Salesforce document generation with just one click. Create hyperpersonalized invoices, contracts, reports, price lists, and more, putting you in control of your brand identity.

Automate document generation through Process Builder, Lightning Flow, APEX, or Platform Events, streamlining the process with simple clicks.

Eliminate errors and improve data accuracy as PDF Butler automatically pulls data from Salesforce standard and custom objects to populate documents, minimizing human error.

Our intuitive interface and MS Word design capabilities simplify even the most complex use cases, shifting the focus from development to design effortlessly.

Boost adoption rates as users experience the benefits of simplified processes, accurate data, and a seamless workflow, driving Salesforce to become an integral part of their daily operations.



Jeroen Burgers Four Star Ranger

★★★★★ 5.0

07/20/2023

PDF generation made easy

Having worked with different PDF generation tools, to me PDF Butler stands out within the Salesforce ecosystem. It provides an intuitive UI and if you know how to work with Word, you're good to go. The ability for less-tech savvy users to create data sources using the SOQL builder is a tremendous asset. Ability to go advanced? Yes you can. Your datasources do not necessarily be sObjects, but generating data through Apex and use that as a datasource, no problem! Other than that PDF Butler has a great support team and lots of Academy content to get you started.

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WWW.PDFBUTLER.COM
+32 3 361 35 30
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Design in MS Word

Unleash your creativity with MS Word design capabilities and shift the focus from development to design effortlessly.

Ease of Use

Simplify processes with PDF Butler's intuitive interface, designed to handle even the most complex use cases seamlessly.

Lightning Speed

Experience rapid time-to-market with quick template modifications and lightning-fast document creation for enhanced efficiency.

Multiple language and currencies

Break language barriers and use your customer regional settings to communicate in their own language.

Easy to Manage Templates

Save time with reusable templates, both static and dynamic.

Dynamic Pictures

Integrate static and dynamic images throughout your documents, including headers and footers.

Cloud Integration

Choose between multi-tenant or dedicated cloud options, providing scalable solutions with automatic upgrades for a seamless integration experience.

Robust Security

Rest easy with API-based connections that ensure constant authentication, encryption, and verification, keeping your data secure at all times.

GDPR Compliance

Protect user privacy with our strict no-data-logging policy, while benefiting from environments that adhere to GDPR regulations.

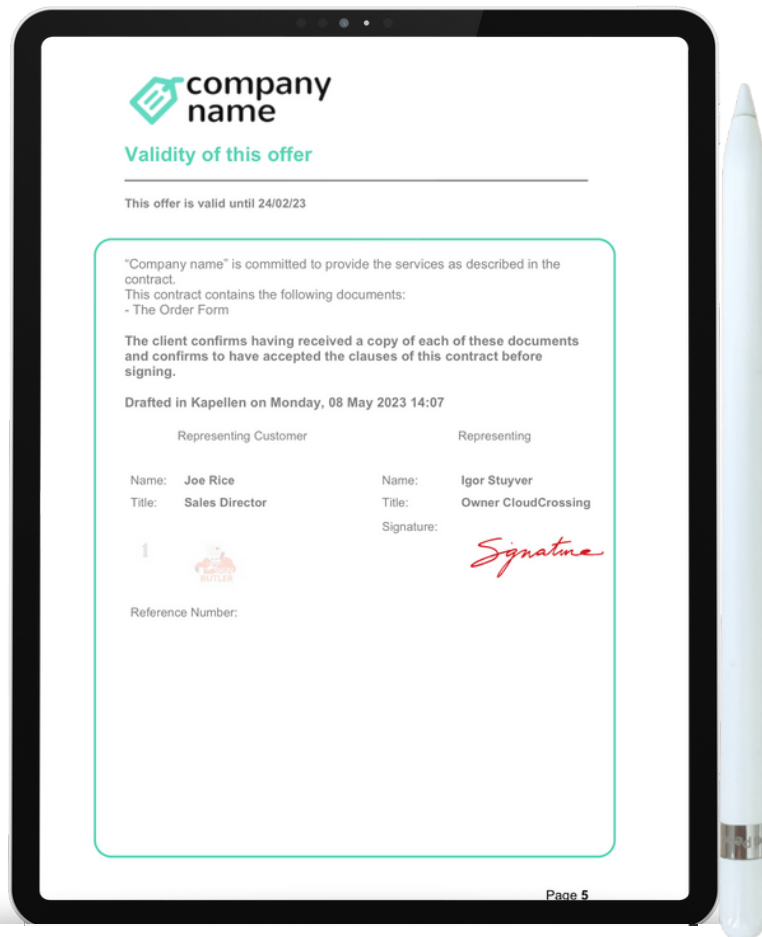
2. SIGN BUTLER

Effortless digital signatures integrated with Salesforce

SIGN Butler, our Salesforce eSignature solution, is here to revolutionize your signing process with unmatched efficiency, security, and ease. Accelerate your deal closures and supercharge your signing experience with cutting-edge features designed to maximize productivity.

Close deals faster with automated multi-signer routing, timed expirations, and reminders. Experience a seamless deal closing process that boosts your business's momentum.

Enhance productivity with SIGN Butler's unique feature that allows signers to fill out missing information while signing agreements. Say goodbye to delays caused by missing data and welcome a new era of efficiency.



With SIGN Butler, we prioritize your data security. Unlike other digital signature tools, we store your data only in your own Salesforce.com organization. Your data remains yours to own and protect, ensuring confidentiality and compliance.

Work with flexibility and convenience using SIGN Butler's responsive design. Send documents from any location and sign them from any device, at any time. Experience the freedom to work on the go without compromising the signing process.

Stay on top of your agreements with effortless progress tracking. Be informed about agreement stages and ensure timely completion with automated reminders. Gain unparalleled visibility and control, simplifying your agreement management.

26%

of time saved

<1 sec

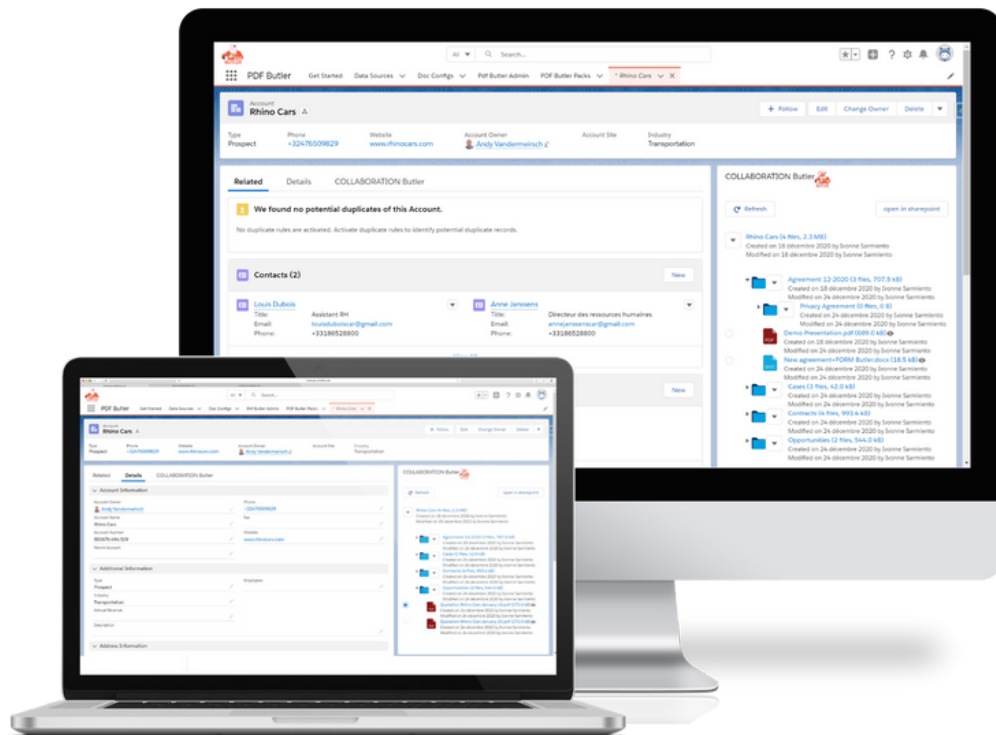
average generation
time

95%

customer retention
rate

3. COLLABORATION BUTLER

Break free from document storage limitations on Salesforce



COLLABORATION Butler revolutionizes your document workflow and takes storage to new heights by seamlessly integrating with SharePoint and Google Drive within Salesforce.

With COLLABORATION Butler's seamless document integration, you'll gain a comprehensive 360° view of your customers, allowing for better-informed decisions and improved customer interactions.

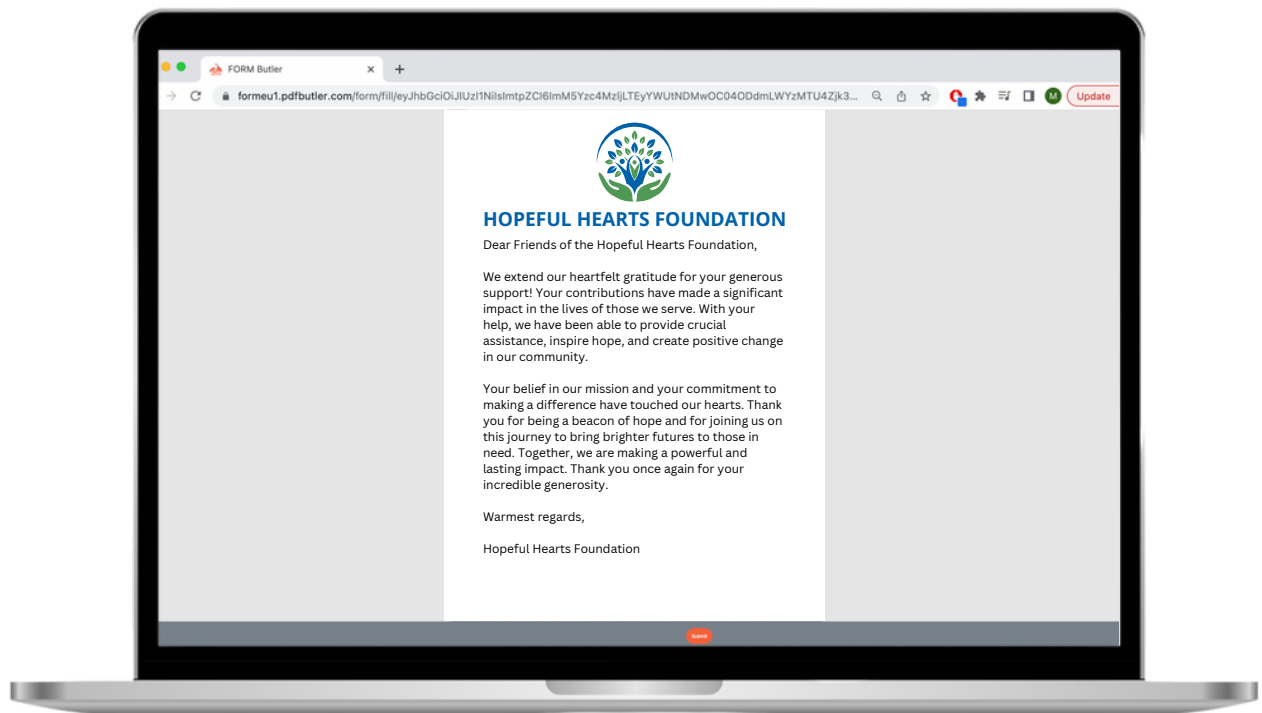
Empower your Salesforce data with dynamic connections, seamlessly linking your records to sites, document libraries, folders, and subfolders, all stored securely in SharePoint or Google Drive.

Experience unparalleled synergy by combining PDF Butler and COLLABORATION Butler. Generate and store documents in SharePoint or Google Drive, granting convenient accessibility anytime, anywhere, and maximizing work efficiency.

Embrace the power of collaboration and document management, making your work more efficient and organized than ever before.

4. BULK BUTLER

Boost efficiency through automated batch document generation



Generate, customize, and send high-volume documents with BULK Butler, empowering you to swiftly create dynamic and customized files, such as contracts, reports, and price lists, with unparalleled efficiency. Experience the ease of automation without complex coding, accelerating document generation at scale.

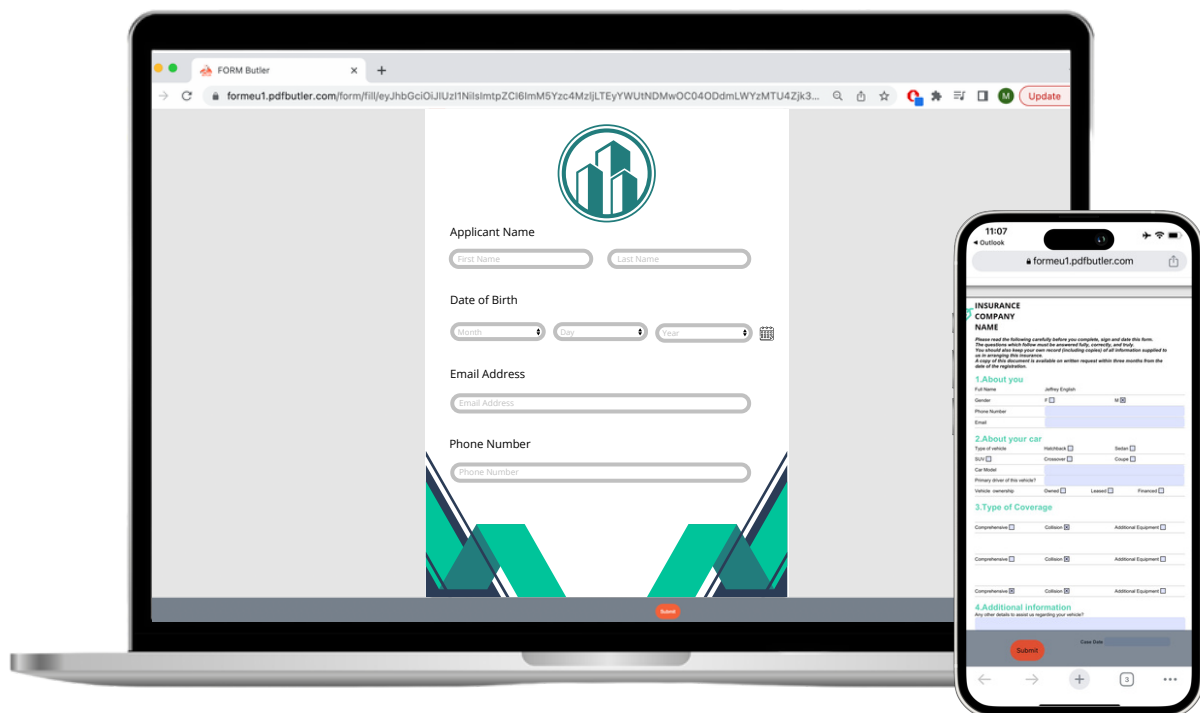
Optimize time-to-value with lightning-fast performance. BULK Butler delivers exceptional speed, ensuring agile document generation and significant return on investment with rapid and efficient processes.

Effortlessly scale BULK Butler to meet your specific document generation requirements. Whether it's processing documents on a recurring schedule or within specific timeframes, BULK Butler seamlessly adapts to your high-volume document needs.

Swiftly generate personalized documents at scale, enhance your brand identity, and streamline your operations with precision and ease. Embrace the power of high-volume document management, taking your document generation to the next level.

5. FORM BUTLER

Enhance your Salesforce data collection



With FORM Butler, creating and updating Salesforce data becomes a seamless and efficient experience, empowering your team to work smarter and faster.

Customized forms are at the heart of FORM Butler's data collection capabilities. Design forms tailored to your specific data needs, capturing information from stakeholders effortlessly. Whether it's lead information, customer details, feedback, or any other data point, FORM Butler ensures you have the flexibility to create forms that align perfectly with your business requirements.

Gone are the days of manual data entry and the risk of human errors. FORM Butler enables direct integration with your Salesforce environment, ensuring that data captured through the forms is automatically synchronized with your Salesforce records.

Say goodbye to duplicate entries, incomplete information, and time-consuming data updates. FORM Butler's seamless integration enhances data accuracy, improving the overall integrity of your Salesforce database.

Ready to revolutionize your document generation process?

[CLICK TO START YOUR FREE TRIAL](#)

