

# A Salesforce FAQ: The 5 things you need to know



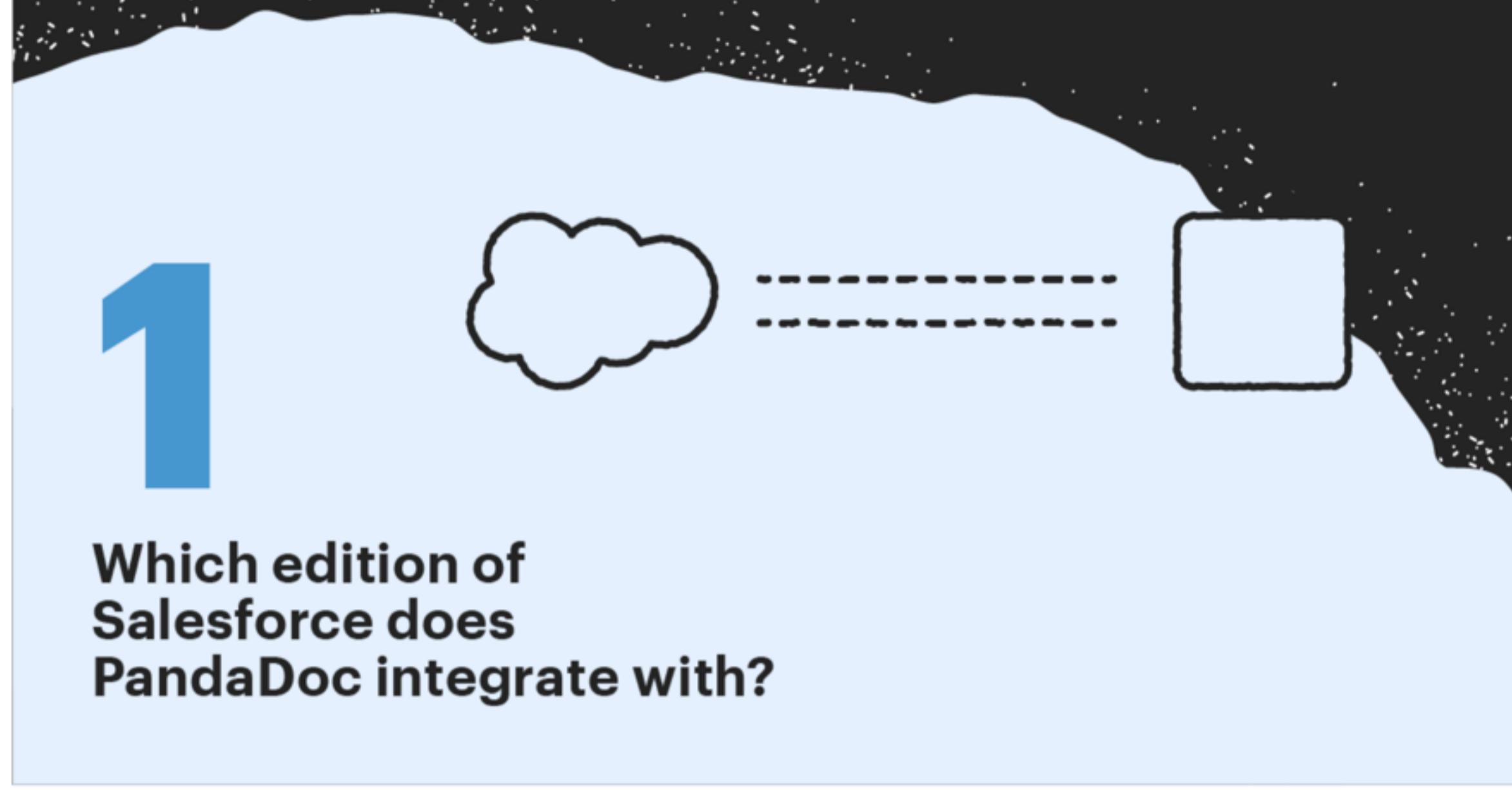
If you’ve ever tried to integrate Salesforce with other tools, you know that process can be frustrating. Integrations should be simple and intuitive, but sometimes it’s hard to find the answers that you need to get the basics out of the way.

At PandaDoc, we’ve done everything in our power to make [our Salesforce integration process](#) simple and easy to follow.

With that in mind, we wanted to create a quick FAQ to answer the most common questions that we receive from teams who want to integrate Salesforce with PandaDoc.

Let’s jump right in.

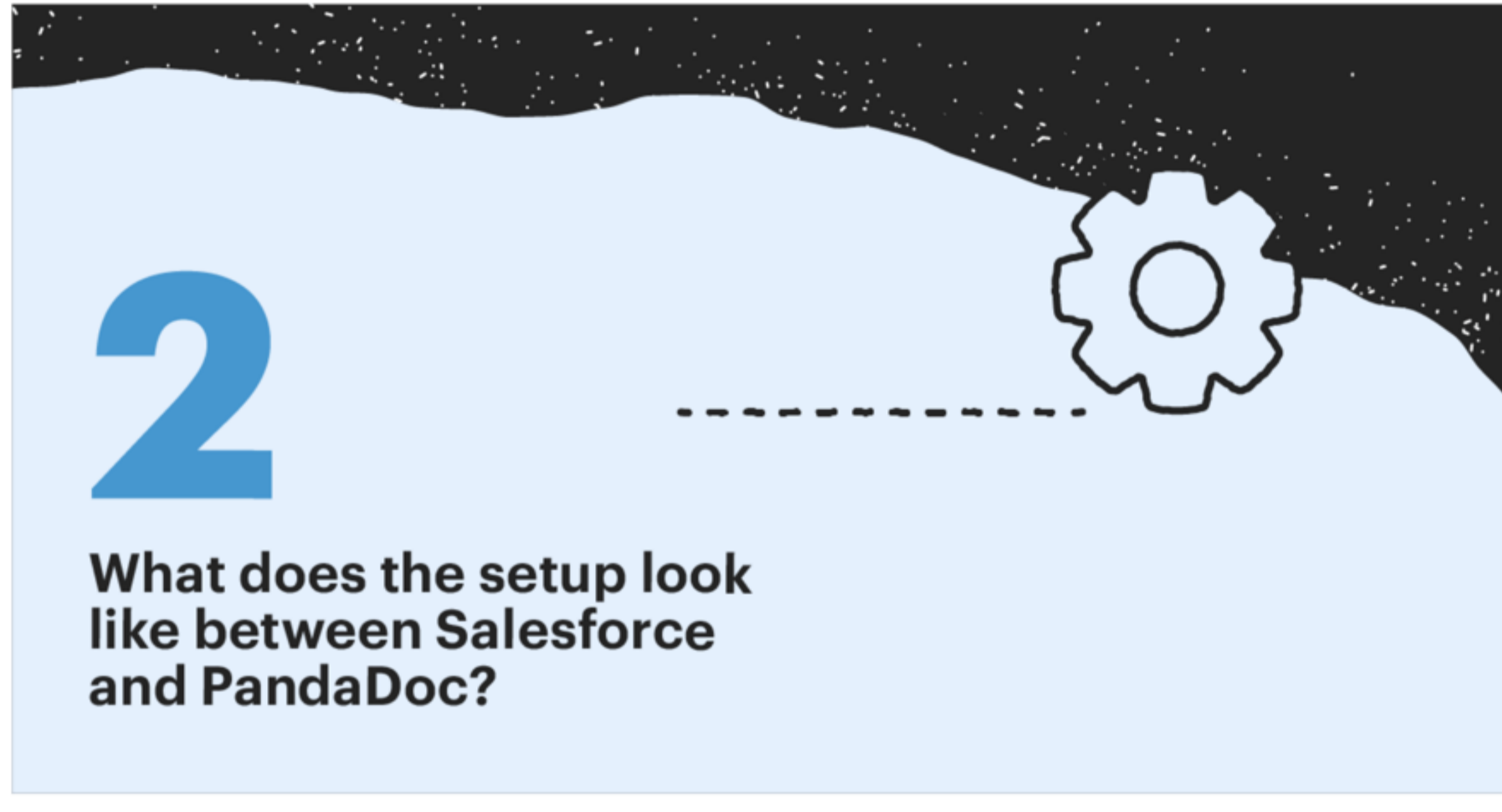
## 1. Which edition of Salesforce does PandaDoc integrate with?



Great news! Our [PandaDoc integration](#) connects with both **Salesforce Classic** and **Salesforce Lightning**.

Whether your team is comfortably situated in one or the other or you switch back and forth between them, PandaDoc can keep up with your team from anywhere.

## 2. What does the setup look like between Salesforce and PandaDoc?



It’s quick and easy to customize your Salesforce integration, and no coding is required.

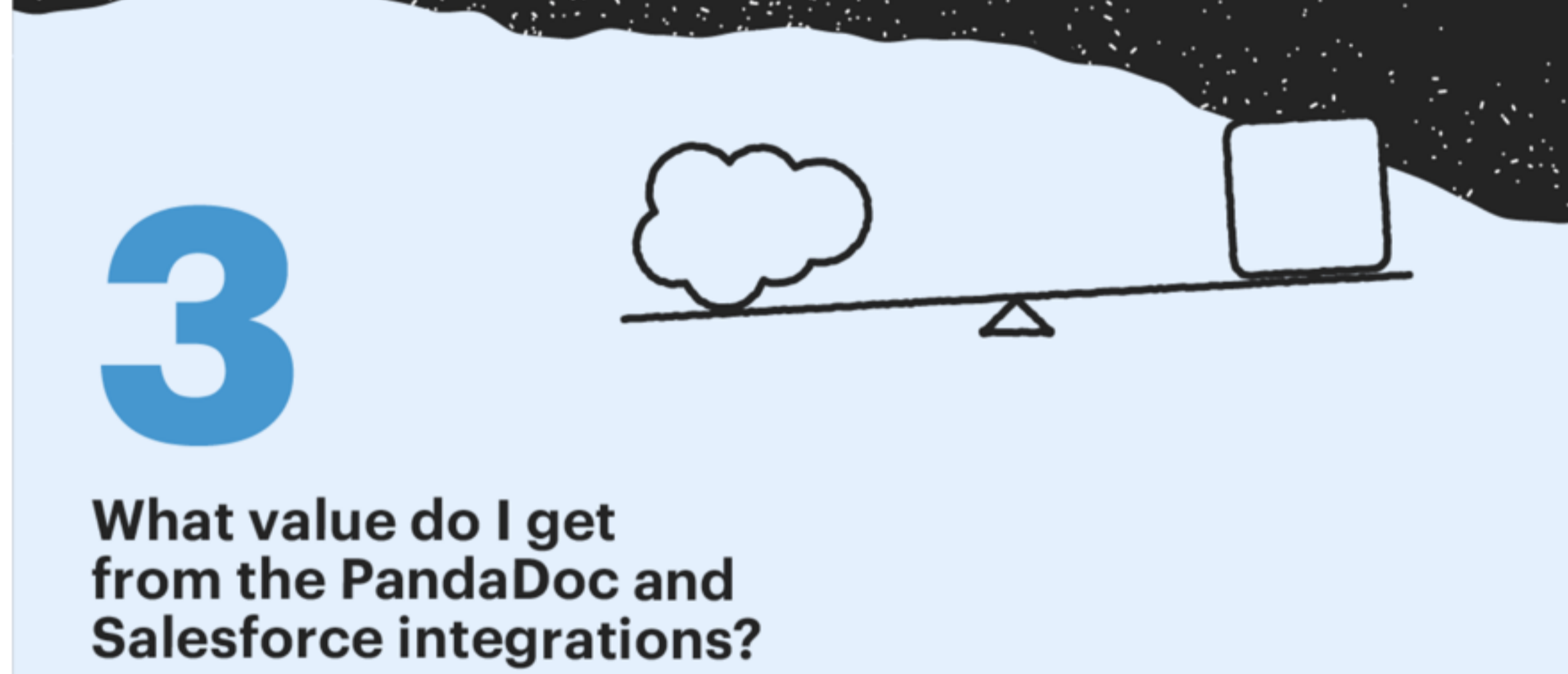
After connecting PandaDoc and Salesforce, it’s easy to customize key steps in your document workflow. Set up your custom fields, and map those fields to tokens within PandaDoc. Create document triggers and clean-up rules in seconds.

It’s fast, easy, and simple.

To top it all off, our integration is set up so that many of the out-of-box features are already a good match for most sales teams. Check the standard integration settings to see if they’re a good fit for your team, and then customize your setup from there.

Want to see it in action? Take a look!

## 3. What value do I get from the PandaDoc and Salesforce integrations?



Our customers have seen major improvements by connecting PandaDoc to Salesforce. On average, [our customers report](#):

- 65% decrease in document creation time
- 30% decrease in the time to close
- 2x the number of closed deals on average

PandaDoc customers spend less time building and creating the documents that they send to their customers. Part of this comes from our template process, but another aspect is the ability to synchronize Salesforce data and opportunities with PandaDoc.

Linking your CRM with PandaDoc expedites the document generation process because teams no longer need to input data twice across multiple platforms. When everything is synced, PandaDoc can be accessed from within the Salesforce platform and data import is done in a few clicks.

PandaDoc also offers document analytics, which helps teams decrease close time. By being able to see who viewed a document and where they spent their time, sales teams are able to tackle problem areas and resolve outstanding issues that can cause deals to stall.

PandaDoc and Salesforce help your team move more quickly, spend more time with customers, and bring those major deals across the finish line with time to spare.

## 4. What else can we expect once we’ve implemented PandaDoc and Salesforce?



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This depends on your goals, but one of the biggest benefits that our customers tell us about is the improvement in [data hygiene](#).

This is something that can waylay marketing campaigns, muck up sales pipelines, and kill profits. Salesforce administrators know that this is a major factor when inputting and exporting data through Salesforce.

When everything is synced together, your team only needs to input the data once in order to populate your quotes, proposals, and other opportunities.

Not only does this mean that your team is spending less time on data entry. It also means that mistakes and errors only need to be corrected from a single location. Integrating your CRM means faster processes, cleaner data, and fewer headaches when something goes wrong.

## 5. Which PandaDoc plan offers these features?



Which PandaDoc plan offers these features?

This is an easy one. You’ll need to grab the PandaDoc Enterprise plan to get your entire team on board.

Not only does this plan include Salesforce integrations, but you can also [integrate with thousands of other apps](#) through our native connections and our Zapier integration.

Your team will have access to all the content analytics and reporting tools you need, as well as a full content library, eSigning workflows, and more.

It’s the full package.

If you’re a smaller organization (or even an individual user), you can connect Salesforce with PandaDoc using the Business plan for an additional \$10 per month per user.

Check out [our pricing page](#) for more information.

## Generate better documents even faster with PandaDoc and Salesforce

At the end of the day, documents are the lifeblood of your business. Between quotes, sales proposals, invoices, and more, it’s easy for basic document generation and storage to get out of hand.

Document creation can also be a huge time waster, especially if your team inputs customer information to a CRM only to find themselves entering it manually across multiple platforms.

By integrating your CRM, team members only need to input the data once before exporting it to all related customer documents. That saves time, money, and headaches.

With PandaDoc and Salesforce, your team can spend less time creating effective documents and more time working with customers to seal the deal.

Want to know more about our integration options? [Click here](#) to take a closer look at everything PandaDoc has to offer.