

5 ways to improve your Salesforce automated process



Looking to transform the way your sales team sells? By [integrating Salesforce with PandaDoc](#), your team will gain efficiencies from this process automation integration that allow them to spend less time creating documents and more time closing deals without ever having to leave their CRM.

What is PandaDoc?

PandaDoc combines document generation, storage, and eSignature functionality to help sales teams improve deal workflow, insights, and speed while delivering an amazing buying experience for their customers.

37% of PandaDoc users are already pulling data directly from their CRM to populate their documents and see an average create-to-send time of 4 minutes.

Explore the five ways these users have harnessed the integrative power of two automation tools to create custom fields within docs, establish workflow rules, streamline the document approval process, automate field updates, and more.

1. Let the pros create the proposals

Slash document creation time by 65% by using one of the hundreds of professional-looking, editable document templates PandaDoc offers for every stage of your business process. Your sales team will appreciate the nearly automatic assembly of engaging, [personalized proposals](#), quotes, and contracts.

Sales professionals can quickly customize page layouts to individual opportunity needs while putting the process to create, approve, and eSign sales documents on auto-pilot by [integrating PandaDoc with Salesforce](#).

2. Populate docs with accurate customer data

PandaDoc enables your team to automate the manual tasks that used to take hours, like carefully populating docs with accurate customer and deal data from Salesforce. Even when the details of a deal are changed in Salesforce, all it takes is one click to update documents with the most up-to-date opportunity data. Stop spot-checking your data for critical updates and start automatically generating accurate and on-brand documents at light-speed.

3. View real-time status updates

PandaDoc's real-time document status updates communicate with Salesforce every time a prospect interacts with your document and notifies you of what the interaction was. This gives your sales team the insight to predict questions prospects might ask by analyzing their movements within the doc and the authority to act at the most opportune time to collect an eSignature.

Your team will benefit from storing all deal-related conversations and negotiations on proposals, quotes, and contracts in a central location embedded within the Salesforce platform.

4. Take advantage of data sync capabilities

PandaDoc is fully integrated with the Salesforce platform and provides data sync capabilities for users to seamlessly transfer data between apps. Your sales team can cross off "update opportunity status" from their to-do list because once a recipient electronically signs, the corresponding opportunity status in Salesforce will be automatically updated.

5. Make eSigning easy

PandaDoc makes eSignatures easy for your sales team to include in all of their documents, they can even upload an existing document and simply add a custom signing field for an even speedier send. [Small business and enterprise sales professionals](#) alike can establish signing orders and use process builders to automate approvals to make simple work of eSignature collection.

Encourage your salesforce admin to audit your account at salesforce.com and take stock of your existing business processes to identify which ones require immediate action as it relates to automating them. Combine PandaDoc's sleek sales and doc generation process builder with your single source of truth to reach the apex of automated efficiency.