

Salesforce teams prefer PandaDoc

Upgrade Salesforce with PandaDoc and simplify how sales teams generate, customize, and eSign professional-looking proposals.

[Request a demo](#)

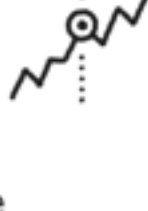


87% 

increase in completed docs per month

50% 

decrease in document creation time

36% 

increase in close rate

Reach your optimal level of productivity

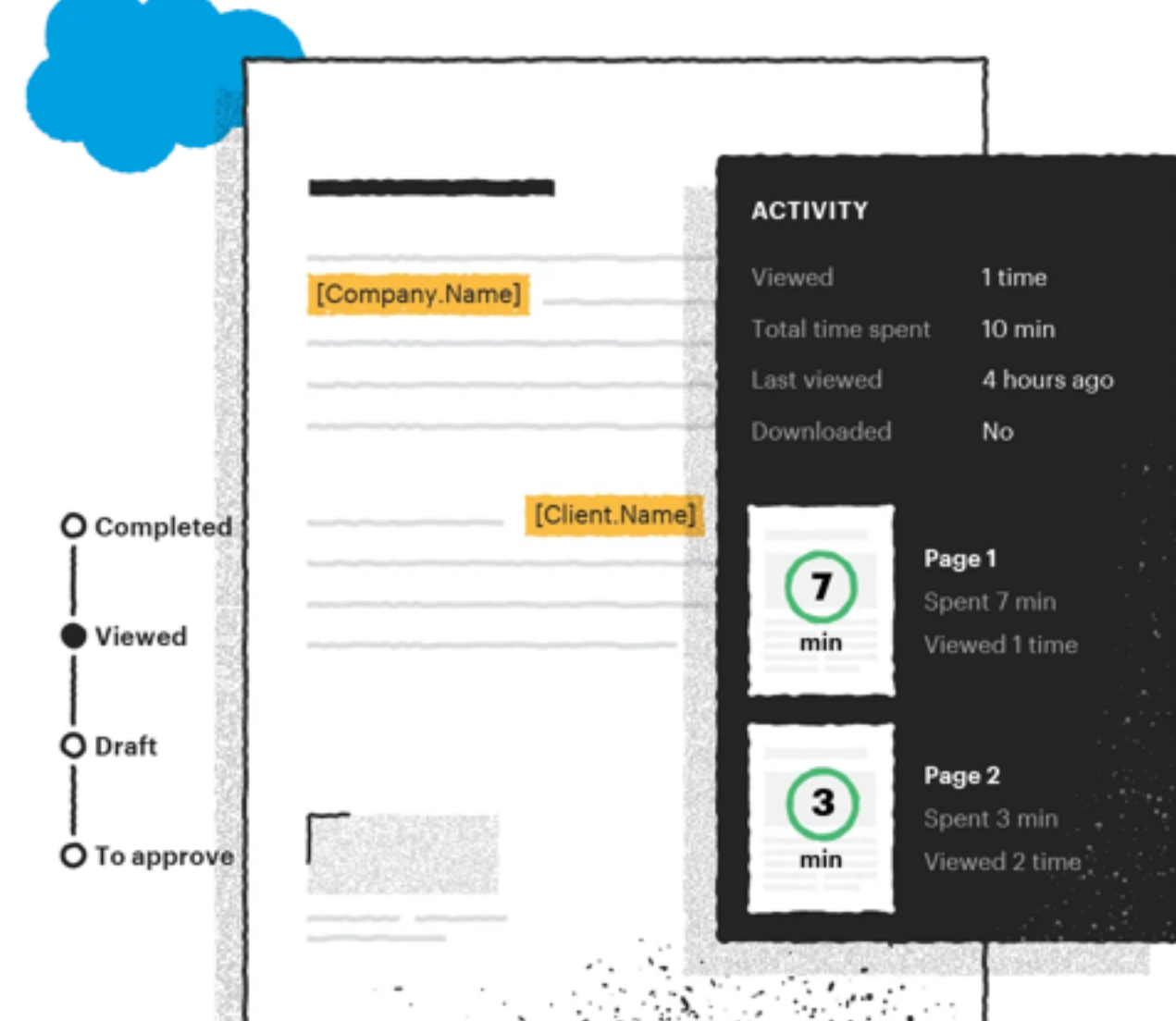
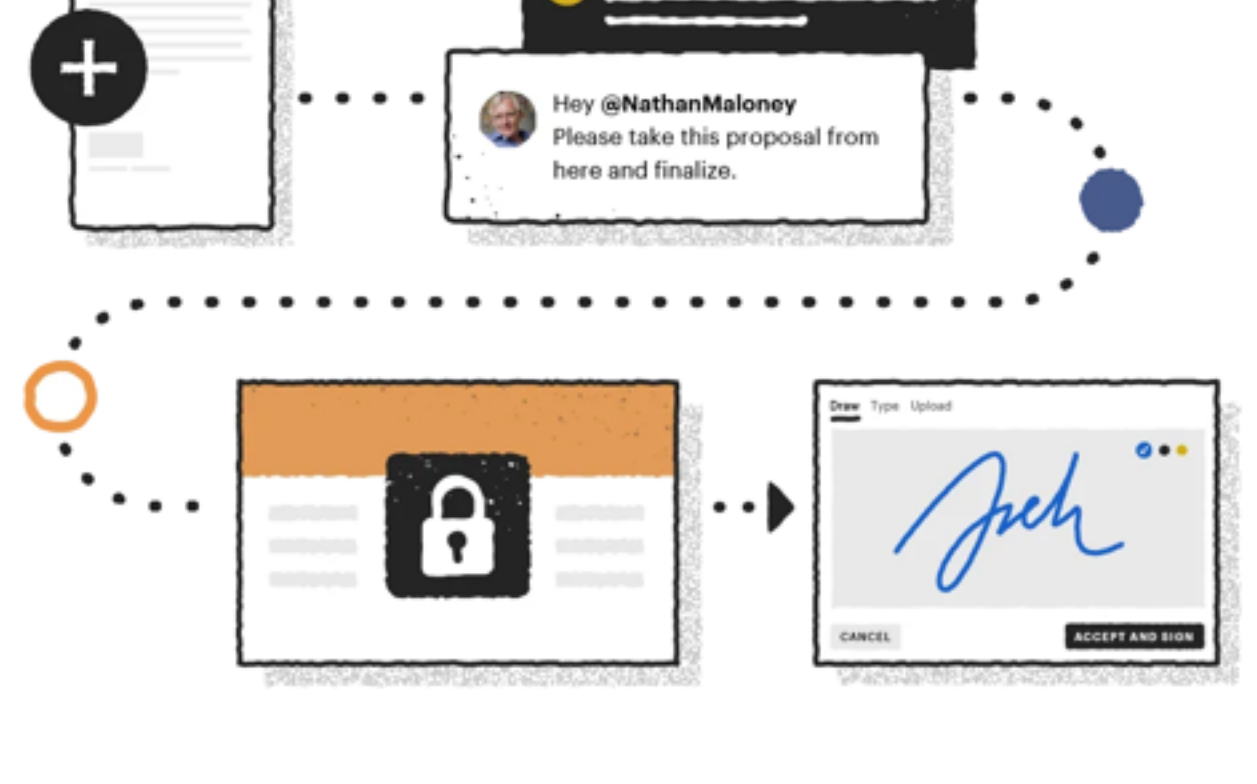
Eliminate tedious copying and pasting of customer data into sales documents when you integrate PandaDoc with Salesforce and start sending docs out the door in one click.



Upgrade Salesforce with PandaDoc

Increase momentum with a workflow that works

Make it easy for your sales team to create, track, and eSign documents, all within Salesforce. A smooth end-to-end workflow automates tasks and keeps teams producing consistent collateral at lightning speed. Lock content on documents, use a signing order, and set approval rules to check all the boxes while still getting sales proposals out in a timely fashion.



Stop wondering and start closing

PandaDoc's real-time document status updates are accessible in Salesforce to let you know exactly who and when prospects are interacting with your documents. These insights give the ability to act quickly at the most opportune times. Benefit from having all deal-related conversations and negotiations on proposals, contracts, and agreements embedded within Salesforce.

Start quickly and win big

Setting up and customizing the Salesforce integration is quick and easy. No coding required. PandaDoc set up tools include out-of-the-box settings to customize your workflow: a token builder for pulling in data, field mapping (including custom fields), data sync, document triggers, file storage, cleanup rules, and more.



Works with your Salesforce edition

For the best experience, PandaDoc integrates with all Salesforce Sales Cloud editions. The PandaDoc integration is Lightning-ready which means you can seamlessly switch from Salesforce Classic to Lightning without breaking your deal and document processes. Download the latest integration package from the [official Salesforce AppExchange listing](#).



"Being able to send a complex quote from Salesforce™ in minutes versus days has dramatically impacted our success. Ultimately, PandaDoc has given us the ability to focus on actually scoping the work rather than just creating the document."



Jocelyn Fennelwald
COO & Co-Founder, OpMentors

[Read full story →](#)

Create a one-stop-shop for closing opps

Take the team's productivity to the next level

When you integrate Salesforce and PandaDoc, you'll gain efficiencies that will allow your team to spend less time building and customizing documents and more time focusing on growing the business. The team will gain access to ready-to-use document templates that they'll automatically populate with accurate customer, product, pricing, and opportunity data from Salesforce. Even when the details of an opportunity are changed in Salesforce, all it takes is one click to update documents with the latest information.

Automate key processes and allow reps to focus on closing

Being fully integrated with the Salesforce platform, PandaDoc provides data sync capabilities that go beyond document generation. Your Salesforce opportunity status will automatically update once your PandaDoc document stage has changed. Your team will be notified through real-time document status updates that communicate with Salesforce every time your prospect interacts or comments or eSigns a document.

Create a single source of truth for everything sales

Gain instant access to the latest document versions, right from your opportunities, contacts, or any other Salesforce object. Your team will not only have quick access to their business-critical documents, but they'll also gain visibility into all the conversations, negotiation, and back and forth that occurred within those documents. Centralization is easy when automated document storage rules set in PandaDoc allow you to automatically store PDF copies in the Notes and Attachments section of Salesforce.