

PDF LIKE NEVER BEFORE



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Built For Salesforce® Lightning

- Native Document & eMail Builder
- No outside tools to learn or manage
- Create PDF, Office and eMail Templates
- Unique drag & drop editor speeds document creation
- Works with any Salesforce object
- Add images, tables, lists and data quickly
- Save templates & make available to any Salesforce user in your company
- Edit templates for easy changes
- Build and send emails natively

Compatible

- Create document and email templates from ANY Salesforce object
- All parent and child objects and APIs may be used within templates
- Related list data displayed as a table
- Create matching document & email templates for improved branding
- Enhance your ERP with bold templates
- Campaign & Opportunity templates are simple. Even with custom fields
- Output PDF, HTML, email, Microsoft® Excel®, Word® and PowerPoint®

Efficient

- Intuitive drag & drop editor with easy learning curve
- Setup takes only minutes to create your first document template
- Generate and send documents and emails from Salesforce One Mobile app
- Clicks only template creation with no coding required
- Streamline CPQ processes with document routing and rules based creation
- Create smart templates to serve the needs of your users and customers

Intuitive

- Sales staff will appreciate how easy it is to create, edit and publish account status and report data to help move sales initiatives forward
- Service departments will find the tools invaluable to help manage work orders, customer statements, and service agreements
- Subscription based businesses will appreciate the rules-based document creation engine to keep everyone on the same page

Rules & Triggers

- Include or exclude template data based on rules that may be user or condition based
- Render less or more based on specific rules being met
- Automatically generate and send documents based on rules and triggers
- Create formulas and calculations in the template instead of on the object
- Manage permissions inside Salesforce the same way you would for any other application
- Place calculated fields anywhere

Simplicity

- UI and Builder are 100% Salesforce Native
- Junodoc Button is to add to any object
- Search and select any object for template
- Quickly create bespoke templates
- Form automation built in
- Generate order confirmations, renewals, account plans, agreements or any type of document based on data from Salesforce
- Streamline reporting across all lines of business
- Account Plans, Case Responses, Field Service Reports

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