DOCFUSION®

DOCFUSION FOR SALESFORCE

Simplify document generation within your Salesforce environment.

salesforce

Leave behind the frustration of complex, costly document generation tools that hinder your Salesforce experience. ***Step into a new era of efficiency with DocFusion for Salesforce.***

SEAMLESS   **SIMPLIFIED**   **EFFICIENT**

Salesforce dominates in CRM, but businesses struggle with document generation and automation within the platform. Existing solutions are cumbersome and expensive, driving up costs and compromising system integrity.

The DocFusion for Salesforce App does away with the need for complex setups and disparate systems, while democratising the document automation process for your teams. Our unified solution seamlessly integrates into your Salesforce environment, empowering you to create beautiful, accurate, and compliant documents directly within your familiar dashboard.

Available on the AppExchange, DocFusion introduces direct-access document generation and automation within your Salesforce environment.

THIS IS WHERE DOCFUSION STEPS UP, ELIMINATING THESE DAUNTING CHALLENGES:

COMPLEXITY

Financial services firms in particular deal with intricate templates that have numerous variables and rules. Relying on complex Apex programming for document generation is risky and expensive

INEFFICIENCY

Current document generation and automation solutions lack in simplicity and customisation, so enterprises struggle to personalise complex documents like contracts and policies.

DEPENDENCY

Reliance on coding skills or IT specialists to create and edit templates to facilitate workflows creates bottlenecks, is costly, and hinders scalability.

REGULATORY COMPLIANCE

Keeping enterprise documents, templates, and rules aligned with changing regulatory standards is tricky. Non-compliance can result in hefty fines, reputation damage, and lost trust.

salesforce

DOCUMENT GENERATION AND AUTOMATION WITHIN YOUR SALESFORCE ENVIRONMENT

The DocFusion for Salesforce App addresses Salesforce users' unique document creation and workflow challenges through easy low-code template assembly, template management, document assembly, and post processing capabilities.

STREAMLINED TEMPLATE CREATION

Using a no-code, drag-and-drop template authoring tool, DocFusion makes it easy for any Salesforce user to design and modify templates, democratising the entire document creation journey.

CENTRALISED TEMPLATE STORAGE

Manage all your Salesforce document templates under one umbrella with a centralised enterprise template repository, to facilitate version control and role-based access.

PRECISE DOCUMENT RULES ENGINE

Automation rules are tailored to Salesforce data, ensuring all documents generated are accurate and compliant.

FLAWLESS INTEGRATION

DocFusion ensures that data extraction and document automation align seamlessly with your existing Salesforce setup, without the need for complex workarounds.

SEAMLESS DOCUMENT PRODUCTION

Fully automate the Salesforce document process, whether it's contract crafting, reporting, or customer and stakeholder communication. Rest assured that all generated content aligns perfectly with your business rules.

INTEGRATED WORKFLOW & E-SIGNATURES

Streamline approval processes, securely capture legally-binding digital signatures, and elevate the overall Salesforce user experience.

DOCFUSION FOR SALESFORCE OFFERS UNIQUE AND POWERFUL FEATURES:

- Salesforce data integration
- Multipoint system connectivity
- Enterprise-level scalability
- User-friendly template creation
- Democratised document creation

ENJOY THESE BENEFITS WHEN YOU INTEGRATE DOCFUSION INTO YOUR SALESFORCE ENVIRONMENT

- **Boosted productivity:** The power of automation allows you to quickly generate intricate documents within Salesforce, allowing your enterprise team to focus on what they do best.
- **Empowered team:** Eliminate the bottleneck of specific expertise; with templates in familiar Word format, there's no need for coding knowledge or dedicated developers.
- **Consistent data:** IIntegrate and synchronise your Salesforce data seamlessly with other business-critical data sources.

- **Adaptive document solutions:** Easily cater to various business needs with DocFusion's support for multiple output formats – whether PDFs, Word documents, or other file types.
- **Uncompromised consistency:** Ensure adherence to branding guidelines and legal mandates, so that every document reflects your brand's integrity.

TAKE THE NEXT STEP

Reach out to our DocFusion specialists today and unveil how our pioneering document generation and automation can amplify your Salesforce environment's potential and performance.