



DOCFUSION[®]

DOCFUSION FOR SALESFORCE

**INTELLIGENT DOCUMENT AUTOMATION
BUILT INTO YOUR CRM**



salesforce

HOW IT WORKS

1. CONNECT

Link DocFusion directly to Salesforce

2. DESIGN

Drag and drop fields into Word-based templates

Create conditional content, repeatable sections, and rule-based logic

3. AUTOMATE

Trigger document generation from Salesforce records

Configure automation without writing Apex code

Deliver documents instantly in your required format

KEY BENEFITS

- Faster time to market
- Create and update templates without IT involvement
- Launch new products and communications quickly
- Reduced Risk
- Ensure accurate data population directly from Salesforce
- Maintain compliance
- Business User Empowerment
- Templates are designed in Microsoft Word
- Seamless Data Integration
- Generate complete, accurate documents
- Consistent Branding
- Maintain brand integrity and legal consistency
- Multiple Output Formats
- Generate PDFs, Word documents, and other supported formats to suit your needs

Turn Salesforce data into accurate, compliant, customer-ready documents

ELIMINATE MANUAL DOCUMENT PREPARATION, REDUCE ERRORS, & ACCELERATE CUSTOMER COMMUNICATION



USE CASES

DocFusion for Salesforce supports a wide range of business processes, including:

- Sales proposals and quotations
- Contracts and agreements
- Policy and onboarding documents
- Customer communications
- Compliance documentation
- Financial and operational reporting

SALESFORCE & DOCFUSION TOGETHER?

Salesforce manages relationships
DocFusion governs document generation

Together, creating a secure, scalable document automation framework that improves customer experience, reduces operational risk, and strengthens compliance



THE CHALLENGE

- Time-consuming document preparation
- Templates with multiple variations
- Compliance and approval bottlenecks
- IT dependencies for changes
- Incorrect or outdated information
- Inconsistent branding
- Grow volume, growing risk

THE SOLUTION

DocFusion integrates directly with Salesforce, enabling users to generate dynamic, data-driven documents without coding or specialist IT support

Allowing business users to design and manage templates in a familiar Microsoft Word environment

The result is controlled, automated document generation fully aligned with your Salesforce workflows

salesforce

155 West Street, Sandton, 2031, Johannesburg, South Africa
Email: marketing@docfusioncloud.com
Phone: (+27) 10 141 5835

[REQUEST A DEMO](#)