



Nintex DocGen® for Salesforce

Documents at the speed of business

Do mission-critical documents like quotes, proposals and contracts detract from your sales team's ability to identify, nurture and close deals?

Nintex DocGen for Salesforce reduces the time, expense and risk of manually creating documents by equipping sales reps to automatically generate data-driven documents throughout the sales cycle.

Sales reps can instantly populate customer-friendly, company-approved templates with a few clicks of a button. Nintex DocGen works behind the scenes to merge data from any custom or standard object stored in Salesforce, entered via customizable forms, or data from other systems of record.

All of the information flows into preapproved templates in Word, PowerPoint, Excel or PDF formats, guaranteeing every document is on brand and accurate.

To ensure documents keep flowing, the solution includes over 15 delivery and storage options, including email, routing for eSignature, and archiving in Salesforce or cloud-based document storage systems.

By equipping sales reps to automatically create and distribute documents, sales organizations can:

- Accelerate sales-to-cash
- Increase sales effectiveness
- Achieve competitive advantage
- Realize higher ROI from investments in Salesforce
- Capture and better utilize customer data
- Improve compliance
- Deliver better customer experiences

No-code Document Generation

Nintex DocGen makes it easy for anyone—regardless of technical prowess or availability of IT assistance—to automate the creation of sales documents. Quotes, proposals, NDAs, order forms, contracts, invoices—all of the documents that drive sales success are just a few clicks away.



Any data

Generate documents with just a few clicks using data from Salesforce records, forms or other systems.



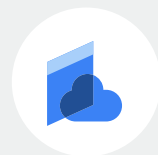
Any document

Improve compliance with templates to create any combination of Word, Excel, PowerPoint and PDF documents.



Any delivery

Select from over 15 options to instantly archive or share documents with one or multiple contacts.

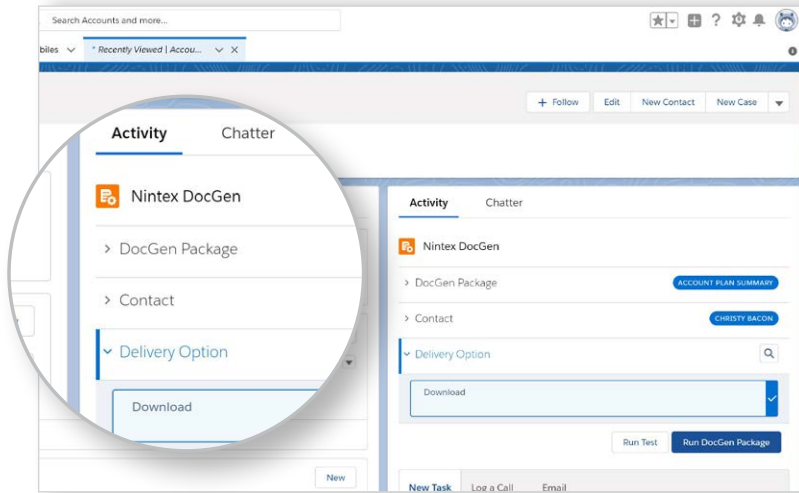


Any Salesforce

Lightning or Classic—Drawloop DocGen® transforms Salesforce data into mission-critical documents.

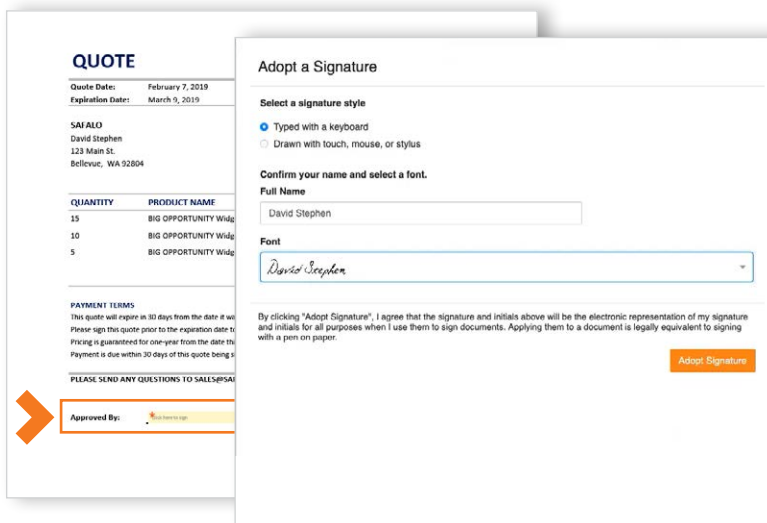
Visit [the Salesforce AppExchange](#)

[nintex.com](#)



Three simple steps

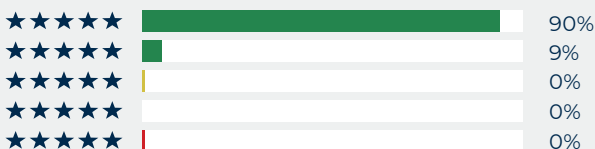
Creating a custom sales document is as simple as selecting the template, choosing the contacts, and specifying how you want it delivered. Within seconds, DocGen works behind the scenes to create on-brand, legal-approved documents.



Simplify Customer Signoffs

Close deals faster with eSignature. Nintex eSign makes it easy to automatically send mission-critical documents for signature, send reminders, and track progress—from anywhere, on any mobile device.

300 Reviews



★★★★★ 4.9
Average Rating

"With Nintex DocGen, we have automated the entire sales contract process and most importantly customer data is accurate. We have eliminated the challenges and problems associated with exposing contracts on the desktops of staff."

– Brian Frank, Director of Global Enterprise Operations

"Prior to Nintex DocGen, it took corporate and our divisions weeks, even months, to prepare and send legal agreements to our retail partners. Now, the user literally has to push a button in Salesforce and within minutes, the entire package is generated."

– Mike Machado, CRM Manager



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