



**DOCFUSION<sup>®</sup>**

## **DOCFUSION FOR SALESFORCE**

**Simplify document generation within your  
Salesforce environment.**

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As an enterprise, you know the power of Salesforce in storing customer data and managing customer documentation.

But your business is swamped with numerous contracts and documents needing complex templates and is tied down by IT dependencies.

How can enterprises generate precise, compliant documents without getting lost in this maze of complexity?

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

#### **COMPLEXITY**

Dealing with intricate templates and numerous variables and rules is onerous and time-consuming.

#### **INEFFICIENCY**

Document processes, when not optimised, result in inefficiencies, errors, and delays.

#### **DEPENDENCY**

Heavy reliance on key individuals or the IT department hinders scalability and creates bottlenecks.

#### **REGULATORY COMPLIANCE**

Ensuring enterprise documents, templates, and rules comply with evolving regulatory standards can be overwhelming.

DocFusion for Salesforce was created to transform these challenges into seamless processes, ensuring impeccable execution at every step.

# DOCUMENT GENERATION & AUTOMATION REIMAGINED FOR SALESFORCE

Working with Salesforce's extensive data no longer has to be overwhelming. DocFusion for Salesforce is designed to seamlessly blend into your Salesforce environment, addressing the unique challenges that Salesforce users face daily.



## 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.

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## UNLEASH DOCFUSION'S DISTINCTIVE FEATURES FOR SALESFORCE

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

## EXPERIENCE THE TRANSFORMATIVE BENEFITS OF DOCFUSION FOR SALESFORCE

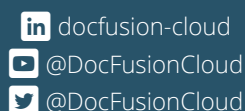
- **Boost productivity:** The power of automation allows you to quickly generate intricate documents within Salesforce, allowing your enterprise team to focus on what they do best.
- **Every team member empowered:** Eliminate the bottleneck of specific expertise; with templates in familiar Word format, there's no need for coding knowledge or dedicated developers.
- **Data harmony:** Integrate and synchronise your Salesforce data seamlessly with other business-critical data sources..
- **Adaptive document solutions:** Cater to various business needs effortlessly with DocFusion's support for multiple output formats, be it 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.

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



[www.docfusioncloud.com](http://www.docfusioncloud.com)