Adobe Sign

Adobe Sign and Nintex Drawloop DocGen

Close more deals, increase data compliance, and execute agreements more efficiently by using Drawloop DocGen with Adobe Sign to dynamically create and send important documents for signature.

Never again manually enter data into documents you send from Salesforce. Automate your document creation process with Drawloop DocGen by leveraging existing templates and data stored in Salesforce. Then, still within Salesforce, use Adobe Sign, an Adobe Document Cloud solution, to streamline the signature process. By integrating e-signature capabilities into Drawloop DocGen, you get an extended solution that improves the return on your investment in Salesforce—helping you maximize adoption, increase data compliance and forecasting, decrease errors, and improve deal visibility.

Automate document creation.

Preparing documents like quotes or contracts for customers can be time-consuming and frustrating. Drawloop DocGen helps you set up automated and repeatable document automation processes by dynamically merging Salesforce data into one or more document templates via a Dynamic Document Package (DDP). With just one click, you can:

- Integrate with workflow rules and automatically modify field values or create a new alert, activity, or action
- Control all DDP elements from one location in Salesforce
- Schedule the delivery of DDPs based on a workflow or change in a Salesforce record

Behind the scenes, Drawloop DocGen helps you standardize the sales and service document process and reduce the resources allocated to document management.

Merge data.

Drawloop DocGen pulls your Salesforce data and dynamically merges it into any combination of documents stored in Salesforce. Drawloop DocGen's merging functionality gives you confidence that the right information is presented in the agreements you send for signature.

- Automatically merge data fields like Account, Contact, or Opportunity and/or custom objects that store information specific to your organization's needs.
- Dynamically populate content from existing Salesforce customer, product, or pricing data.
- Create net new records and update data in Salesforce.

Configure and send.

Automatically create a document package composed of one or more Word, PowerPoint, Excel, or PDF document templates populated with your Salesforce data. You can combine multiple document formats into a single PDF while preserving the formatting of the original documents, and the DDP can be delivered via multiple means as well, including triggers or workflows.

Once you've compiled your customized document, you can send it from Salesforce using Adobe Sign to streamline the signing experience.

Accelerate the signature process.

Using Adobe Sign to execute the e-signature process can reduce the time to signature by 95%. The intended signers of your agreements simply receive an email with a link that guides them through the document, where they can complete the signing process in just a few quick clicks without downloading or installing any software. Recipients can sign from anywhere, on any smartphone, tablet, or browser.

Once signed, the Salesforce record is automatically updated with information captured during the signing process, and the executed contract is stored within Salesforce. All parties receive copies of the signed document, and the entire process can happen in a matter of minutes.

Together, Drawloop DocGen and Adobe Sign help your organization eliminate manual processes and increase accuracy and compliance, all while leveraging your existing system, documents, business processes, and workflow rules.

About Adobe.

Adobe is a global leader in digital marketing and digital media solutions. Adobe's tools and services enable customers to create groundbreaking digital content, deploy it across media and devices, measure and optimize it over time, and achieve greater business success. As the creator of Acrobat software and the PDF file format, Adobe has been a pioneer in electronic document solutions for more than 25 years. That's why global Fortune 1000 companies across a broad range of industries trust Adobe solutions every day to help them innovate while reducing costs and increasing efficiencies across their organization.

About Nintex.

Nintex is the global standard for process management and automation. Today more than 8,000 public- and private-sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating, and optimizing business processes.

For more information.

www.adobe.com/go/adobesign