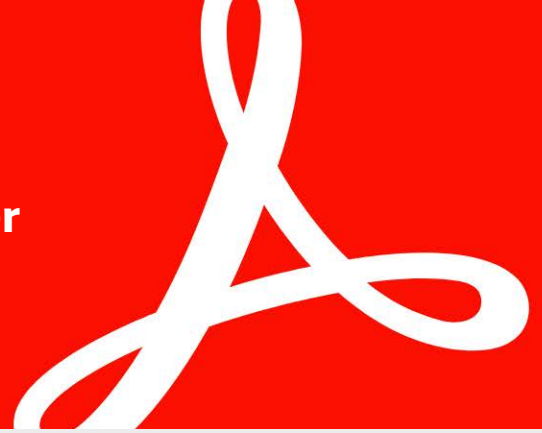




Adobe Acrobat Sign

# Adobe Acrobat Sign with Document Builder for Salesforce

Automate every phase of business-critical, sales document workflows.



 **IDC Adobe named a Leader in Worldwide eSignature Software**

Since 2006, the Adobe Acrobat Sign and Salesforce integration has been helping organizations worldwide automate document-driven workflows—efficiently sending documents for e-signature, providing real-time tracking, and storing signed documents with a full audit trail—all within Salesforce. Today, organizations want to expand those benefits to unleash greater employee productivity, strengthen security and compliance, enhance the user experience, and improve the bottom line.

Automating the generation of the business-critical documents (quotes, sales contracts, SOWs, RFPs, service agreements, invoices, pipeline reports, and so on) that are adjacent to the traditional Acrobat Sign [e-signature](#) process represents a significant opportunity for sales organizations.

## Automatically generate data-driven sales documents in Salesforce to close business faster.

Sales reps need to produce customized, data-driven sales agreements on a daily basis to drive revenue, ensure smooth operations, and minimize business risk. But the current process is manual, slow, and error-prone:

**Hours spent researching and creating sales documents.** Sales reps should be selling, but they typically only spend about 39% of their time interacting with prospects and customers. That's because much of their nonselling time is spent generating sales documents and reports. Sales reps spend hours, days, and even weeks researching and manually reentering custom data into each agreement. And even when the data they need is kept in Salesforce, it is spread across different objects (accounts, contacts, opportunities, custom objects, and so on), requiring that they manually toggle between different pages to gather the content they need.

Because sales documents are time sensitive, and the early contract often wins the deal, time lost manually creating these agreements translates into lost opportunities.

**Risk of inaccurate data.** The data that sales documents require—such as customer information, pricing, product details, terms, conditions, policies, and so on—changes continuously. And many agreements must be tailored to reflect costs and other terms that vary according to location or other business criteria. Even if a sales rep finds the up-to-date information, they may reenter it incorrectly. And inaccurate data not only lengthens approval cycles—if it's not corrected, it can create business risk.

**Time-consuming formatting.** Customers want contracts that are clear and easy to read. As sales reps insert data from a wide range of sources, it can wreak havoc with tables, lists, and other aspects of document templates that must be manually adjusted.

To solve these problems, some organizations have purchased standalone document generation software, which injects new technology into the workflow at an added cost of US\$20–US\$30 per user per month.

### Try Acrobat Sign with Document Builder for Salesforce.

Experiencing is believing! Put your sales documents on the fast track with a 30-day [free trial of Acrobat Sign for Salesforce](#). Then download the [Document Builder plug-in](#).

# NEW: Document Builder automates document generation within the Acrobat Sign for Salesforce integration.

Document Builder is a strategic new addition to the Acrobat Sign and Salesforce integration. It allows sales employees to automatically generate accurate, data-driven documents in Salesforce instantly—at no additional cost.

## Automate document templates in a flash.

With Document Builder, Salesforce administrators or other IT staff can easily build automated document templates that save sales reps time and help ensure accuracy.

- **Automate document templates with no coding.** Use the Document Builder [Word add-in](#) to automate frequently used document templates in DOCX format. Using our proven drag and drop user interface, you can create Document Builder-enabled templates in a few clicks that instantly prepopulate with Salesforce data and Acrobat Sign e-signature fields.
- **Help eliminate business risk with conditional logic.** Document Builder lets you insert business rules that help ensure each document includes the right content. Conditional logic allows the display of rules-driven data and text in specific document sections, tables, lists, and calculation formulas.
- **Reduce software TCO.** With Document Builder, you can eliminate the cost of standalone Document Generation solutions with proven document generation software from Adobe, the digital document leader.
- **Empower every employee who relies on Salesforce.** With an Acrobat Sign license, any Salesforce user in any department can access Document Builder-enabled document templates at no additional cost.

## Automate a wide range of data-driven sales documents with Document Builder.

Sales	General business
<ul style="list-style-type: none"><li>▪ Quotes and proposals</li><li>▪ Invoices</li><li>▪ Statements of work (SOWs)</li><li>▪ Insertion orders</li><li>▪ Change orders</li><li>▪ Requests for proposals (RFPs)</li><li>▪ Sales contracts</li><li>▪ Financing applications and agreements</li><li>▪ Loan/lease agreements</li><li>▪ Service agreements</li><li>▪ Renewal agreements</li><li>▪ Account plans</li><li>▪ Pipeline and opportunity reports</li></ul>	<ul style="list-style-type: none"><li>▪ SOWs</li><li>▪ Nondisclosure agreements (NDAs)</li><li>▪ Invoices</li><li>▪ Vendor agreements</li><li>▪ Finance agreements</li><li>▪ Master service agreements</li></ul>

## Ensure every sales document includes the legal department's latest terms, conditions, and policies.

The legal terms, conditions, and policies that appear in sales documents change frequently, making it difficult to ensure every sales document includes the latest terminology. Document Builder helps your legal team eliminate the business risk associated with outdated content and keeps your deal desk operating efficiently.

- **Update legal terms, conditions, and policies once—to automatically appear in every new sales document.** Simply update your terms in Salesforce. When sales reps use a Document Builder-enabled template, it will automatically populate with your latest content.
- **Spend less time reviewing sales documents and more time on value-added projects.** Document Builder helps ensure every new sales document includes the latest terms and conditions, which dramatically reduces the time legal teams spend reviewing documents and deal desks spend resolving problems, so everyone can spend more time on projects that add more value to the business.

## From exhausting to effortless—it's never been easier for sales reps to generate data-driven sales documents.

With Document Builder-enabled templates, sales reps can instantly create accurate contracts to get them out sooner and close business faster.

- **Complete sales agreements in seconds.** Eliminate the hours, days, or weeks required to research and reenter data. Select a document template created with Document Builder and data from Salesforce prepopulates instantly.
- **Always accurate.** Document Builder-enabled templates are programmed to access up-to-date and conditional data so you can be confident that sales documents are accurate.
- **Ready to send.** Document Builder utilizes the proven Adobe Document Generation API to enable dynamic formatting, so tables, lists, and other document sections automatically adjust to fit data and every agreement makes a good impression.

### Automate document generation at no additional cost.

Standalone document generation solutions typically start at US\$20 per user/mo. In contrast, Document Builder is included in the Acrobat Sign license, so any employee who uses Salesforce can instantly generate data-driven sales documents—at no additional cost.

# Automate sales document workflows end to end—from document generation to e-signature to secure storage—in Salesforce.

Data-driven document generation improves the efficiency of the first step in a sales agreement workflow. But sales documents are time-sensitive, business-critical transactions that must be processed quickly, cost-effectively, and securely—while adhering to country, industry, and regulatory compliance requirements. That’s why organizations need to automate sales document workflows end to end.

Acrobat Sign is the ideal e-signature platform to automate the business-critical document workflows your organization relies on every day.

## End-to-end document workflow automation

Acrobat Sign is tested and proven to help customers close business faster, reduce costs, and deliver an exceptional user experience. In Forrester’s [Total Economic Impact of Adobe Acrobat Sign report](#), Acrobat Sign delivered 30% faster transaction speeds and 47% greater back-office efficiency. And by integrating Acrobat Sign with Salesforce, customers gain additional productivity boosts with real-time visibility and tracking, instant record updates, and automatic archiving—all in Salesforce.

Customers who use Document Builder will generate even greater savings. Automated document templates will virtually eliminate the time sales reps spend researching and creating a wide range of agreements. But that productivity savings is just the tip of the iceberg. Sales reps can invest those regained hours to increase their selling time, driving more opportunities and closing more business. And sending sales documents out sooner can help reps close deals faster and increase win rates.

## Secure and compliant, by design

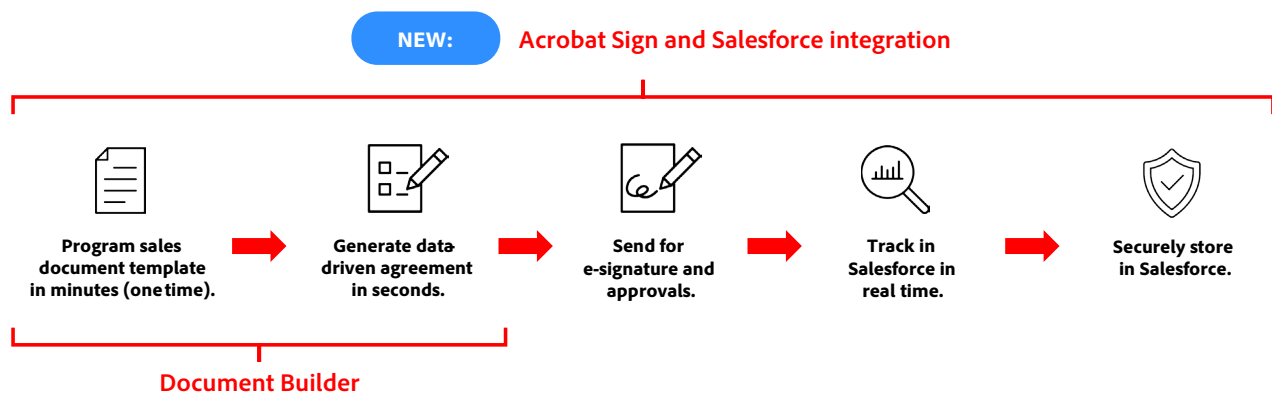
Organizations must ensure that automated sales document workflows are designed to meet both internal and regulatory security and compliance requirements. In its [Marketscape: Worldwide e-Signature Software 2021 Vendor Assessment](#), IDC stated that organizations increasingly require that their e-signature platforms include:

**Acrobat Sign with Document Builder works across Salesforce Clouds, including Sales Cloud, Service Cloud, Community Cloud, Financial Services Cloud, Health Cloud, and CPQ.**

- Tiered models of authentication and security, including remote online notarization (RON)
- Compliance with global government electronic identification (eID) platforms
- Digital signatures that use hosted keys and transient keys to verify qualified digital signatures

IDC has positioned Acrobat Sign software's authentication capabilities as a strength. Acrobat Sign advanced e-signatures help organizations comply with complex industry regulations and stringent security standards around the world—so they can automate their business-critical workloads with confidence, knowing they are secure and compliant by design.

Acrobat Sign encrypts documents and assets so data is secure at rest and in transit. Once signed, documents within the Acrobat Sign and Salesforce integration are stored with a tamper-evident seal and full audit trail. And now Document Builder extends the security of the workflow further, from the moment the final document is generated and sent.



## Better together

When organizations integrate Acrobat Sign with Document Builder and Salesforce, productivity skyrockets. That's because they can now automate every phase of sales document workflows—including both human and document-driven tasks—from document generation through [tracking](#), e-signature, and document storage—all within Salesforce.

Unlike other e-signature integrations with Salesforce, the Acrobat Sign and Salesforce integration is designed to deliver a superior experience for sales employees, IT managers and administrators, legal and legal operations teams, and customers alike. Acrobat Sign is fully embedded in Salesforce native objects and Lightning, so the user experience is easy and intuitive. Adobe excels in delivering a high-quality mobile experience, so anyone who interacts with the document workflow can view or sign the document on any device, any time. As each workflow milestone is completed, they are instantly notified.

IT administrators value the easy setup and administration of the integration. The Acrobat Sign and Salesforce integration requires no coding and can be completed using a one-page, step-by-step online document. Other platforms require use of JavaScript and involve installation manuals that exceed 140 pages.

The Acrobat Sign and Salesforce integration is free with an Acrobat Sign license and available across Sales Cloud, Service Cloud, Community Cloud, Health Cloud, and Salesforce CPQ—making it easier and more cost effective to automate any [document workflow](#) your organization processes in Salesforce.

For all of these reasons, Acrobat Sign has earned a 5-star rating on the Salesforce AppExchange.

*“Consider Adobe if you are looking for a robust, global, enterprise-class signing solution that can be integrated with a broad range of applications and support a large number of use cases.”*

IDC Marketscape: Worldwide eSignature Software 2021 Vendor Assessment



## Higher ROI

You can count on Acrobat Sign to deliver an outstanding ROI. Forrester's recent study revealed that Acrobat Sign provides the average enterprise customer with 519% ROI over three years and US\$21.5 million in savings. You get more value from Acrobat Sign:

- Unlike other e-signature providers, an Acrobat Sign license provides access to broad range of prebuilt, native enterprise integrations and advanced features—all at no additional fee.
- The Document Builder feature lets Acrobat Sign customers eliminate the expense of purchasing on duplicate document generation tools, which reduces their TCO and further improves their IT ROI.
- Acrobat Sign has broad applicability enterprise-wide, allowing customers to standardize on a single, powerful, and cost-effective e-signature platform.

## When organizations need a true digital transformation partner, they choose Adobe.

When organizations seek to automate business-critical workflows, they don't want incremental improvements. They need a true, digital transformation partner. Adobe specializes in helping our customers reinvent and optimize mobile-first, digital experiences across the enterprise. Adobe has been the leader in digital document processing for 30 years. [Learn more](#) about how we can help you digitally transform your sales processes with our leading Acrobat Sign and Salesforce integration.

