Together at last: Automated document generation and e-signatures.

Save time, save money, and improve accuracy with the transformative new Document Builder feature for Adobe Acrobat Sign for Salesforce.

Conquer your biggest sales productivity challenge.

For sales teams, the equation is simple: More time selling means more time winning, which means more revenue for the business.

But in practice, many sales teams spend more time gathering data and on email than they do actually selling. Hours turn into days, which turn into weeks. According to a Forrester report, it can take almost **three and a half weeks** to manually create and approve the average sales contract.

From quotes, proposals, and invoices to statements of work, documents are at the center of how sales get done. And each document depends on data—from customer information and pricing to product details and terms and conditions. Even when data is kept in Salesforce, it's spread across different objects—accounts, contracts, opportunities, custom objects, and so on—requiring a user to manually toggle between different pages to gather the content they need.

This reality, combined with a process that's manual and protracted, allows errors and compliance issues to creep in, creating business risk.

And there's one thing your sales reps haven't been doing during all these steps: more actual selling.

In this age of digital transformation, there clearly has to be a better way. But up until now, you've had to piece together separate document generation software and e-signature software to try to automate these document workflows. That's an expensive and time-consuming approach.

In this eBook, we'll show you how the trusted integration of Adobe Acrobat Sign for Salesforce has taken an innovative, single-platform approach, providing you with blazing-fast, end-to-end document workflows that will enhance sales productivity.

Acrobat Sign: 8 billion e-signatures strong.

As IDC MarketScape's most recent market assessment on e-signature vendors made clear, customers have increased expectations from their e-signature platforms. This includes more document automation, advanced security, compliance, scalability capabilities, and earning greater value through application integrations and innovative technologies.

Acrobat Sign is an industry-leading, enterprise-grade e-signature platform that helps organizations around the world transform and speed up their workflows. In 2021, IDC MarketScape named Adobe a Leader for Worldwide eSignature Software. IDC recognized Adobe's "broad experience and vision around how integrated productivity software and digital workflows transform business processes and customer and employee experiences" as a key differentiator.

Acrobat Sign x Salesforce. Better together.

Acrobat Sign and Salesforce are two digital transformation leaders that have been partnering to help customers work more efficiently since 2006. They are complementary solutions: Salesforce excels in automating business process workflows, and Acrobat Sign is a leader in automating the document-driven workflows that mark every CRM customer milestone.

With 3,100-plus reviews and a 5-star rating on the Salesforce AppExchange, the Acrobat Sign integration is helping organizations worldwide automate document-driven workflows —efficiently sending documents for e-signature, providing real-time tracking, and storing documents with a full audit trail and tamper-evident seal—all within Salesforce.

And now, the integration will transform sales productivity even more with the introduction of the new Document Builder feature for Acrobat Sign.

Meet Document Builder.

One of the high-demand capabilities IDC reported that customers want in their e-signature solution was the ability to automate more document-driven workflows.

Enter Document Builder, a game-changing new feature within Acrobat Sign for Salesforce. This feature allows teams to automate sales document workflows from the earliest stage of document generation to approvals, e-signature, and secure storage—all in Salesforce.

Any document—automated.

Automate a wide range of data-driven sales documents with Document Builder, including:

Sales

- Quotes and proposals
- Invoices
- Sales contracts
- Service agreements
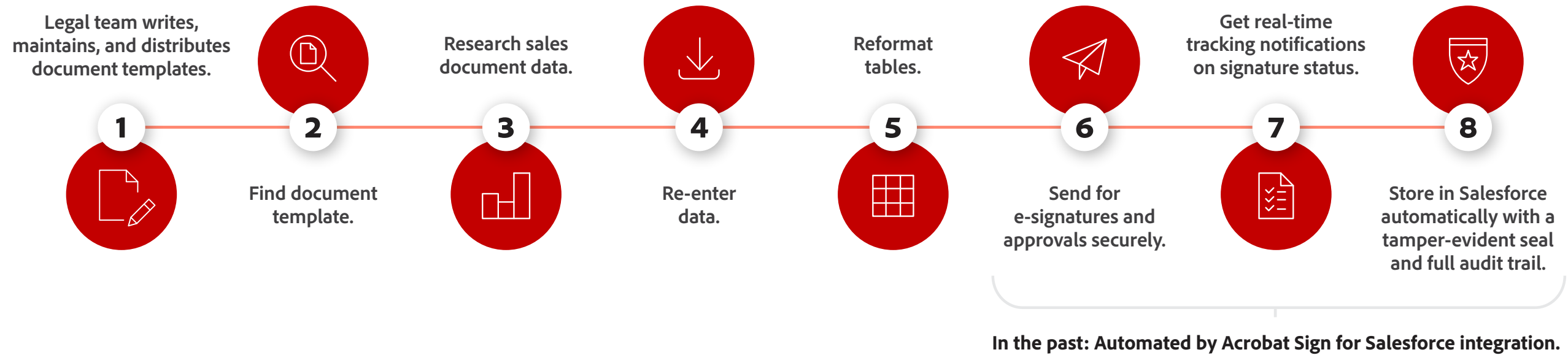
General business

- SOWs
- NDAs
- Consulting agreements
- HR agreements

"The main win for us was that Document Builder simplified our app portfolio in Salesforce. Instead of using two software tools [document generation software and e-signature software], we can now converge into one. We don't need to integrate the apps, and it's easier for us to support."
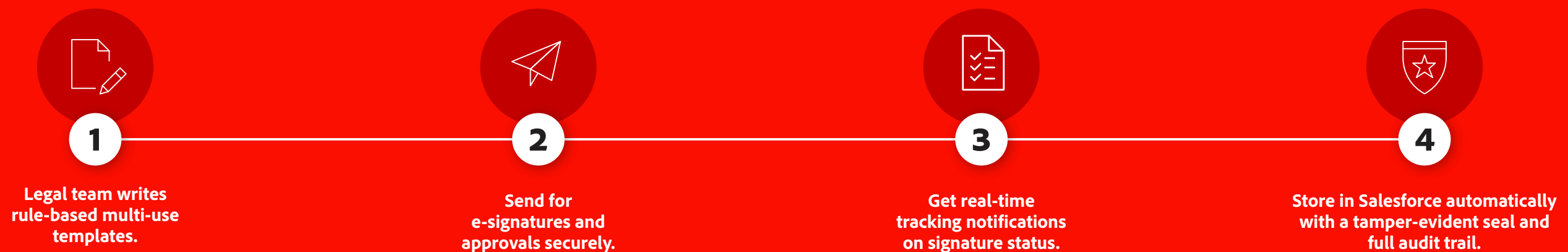
Electronics manufacturer

These two illustrations show how Document Builder streamlines sales document workflows from end-to-end:

The sales contract process—**before Document Builder.**

1 Legal team writes, maintains, and distributes document templates.

2 Find document template.

3 Research sales document data.

4 Re-enter data.

5 Reformat tables.

6 Send for e-signatures and approvals securely.

7 Get real-time tracking notifications on signature status.

8 Store in Salesforce automatically with a tamper-evident seal and full audit trail.

In the past: Automated by Acrobat Sign for Salesforce integration.

The sales contract process—**after Document Builder.**

One simple process with Acrobat Sign for Salesforce:

1 Legal team writes rule-based multi-use templates.

2 Send for e-signatures and approvals securely.

3 Get real-time tracking notifications on signature status.

4 Store in Salesforce automatically with a tamper-evident seal and full audit trail.

As you can see, Document Builder transforms a prolonged series of disjointed steps into one short, streamlined process. Once a sales document template is created—which happens just once, in minutes—the Document Builder feature allows sales employees to automatically generate accurate, data-driven documents in Salesforce instantly. What once took weeks now takes seconds, which means there's more time to win new business.

Document Builder benefits everyone in the sales process.

Sales reps who create agreements and e-signatures will find the Document Builder feature within Acrobat Sign for Salesforce valuable on day one. So will IT, legal, and deal desk teams. Here are the benefits each group should expect.

IT ops and Salesforce administrators: Automate document templates with no coding required.

- **Eliminate the need for coding.** In a few clicks, automate frequently used document templates to pre-populate with Salesforce data and Acrobat Sign e-signature fields.

- **Mitigate business risk with conditional logic.** Apply business rules that drive the conditional display of specific document sections, groups of data, images, and contract calculations.

- **Enable dynamic formatting.** Leverage the proven Adobe Document Generation API to automatically format data lists and tables, ensuring a professional appearance every time.

- **Empower all who rely on Salesforce.** With an Acrobat Sign license, Salesforce users enterprise-wide can use automated document templates at no additional cost.

Sales reps: An effortless way to sell more.

- **Complete sales documents in seconds.** Eliminate the hours required to research and re-enter data and conditional content. Easily open the template, and data from Salesforce pre-populates instantly.

- **Ensure accuracy.** By leveraging conditional logic, templates are programmed to access up-to-date data in Salesforce—terms and conditions, policies, rules-based content, calculation formulas, and more.

- **Get files ready for delivery.** Dynamic formatting ensures tables, lists, and content automatically adjust so every agreement makes a good impression.

Legal and compliance: Shield your team with ironclad contracts.

- **Maximize time with baked-in compliance.** Instead of reviewing every contract to make sure your latest terms, conditions, and policies are being used, just update that content once in Salesforce. Then, Document Builder will automatically include that up-to-date data in every document going forward.

- **Focus on projects that add value.** Now legal staff can spend less time reviewing documents and redirect their expertise to more strategic projects.

- **Eliminate deal desk issues.** With improved document accuracy, you can accelerate your sales cycle while eliminating deal desk inefficiencies.

Accelerate sales productivity with a best-of-breed sales automation engine.

Your sales reps want to spend more of their time focusing on what they do best—selling. It's time to give every Salesforce user in your organization the power of:

The best Salesforce integration.

The 5-star rating for Acrobat Sign on AppExchange makes it the top-rated e-signature platform for Salesforce. And with the introduction of Document Builder, it's even better. Adobe is the first e-signature provider to automate the end-to-end "Build it. Sign it. Close it." sales cycle by integrating leading document generation and e-signature capabilities in the same platform.

At the best value.

You don't need separate document generation and e-sign solutions. With a single Acrobat Sign license fee, you not only get Document Builder, but all of Acrobat Sign's 80+ enterprise software integrations and features like APIs, branding, and advanced security. This is why the average Acrobat Sign customer achieves a 519% ROI over 3 years.

By the best partner.

Organizations are under more pressure than ever to digitally transform more processes to improve business agility and reduce costs. Documents play a critical role in many of those processes. When organizations seek to automate business-critical workflows, they don't want incremental improvements. They need a true, digital transformation partner.

Adobe can help.

Adobe has been the leader in digital document automation for more than 30 years. Learn how we can help you digitally transform your sales processes with the leading Acrobat Sign for Salesforce integration.

Sources

IDC MarketScape: Worldwide E-Signature Software 2021 Vendor Assessment, #US46742320, September 2021.

The Total Economic Impact™ Of Adobe Acrobat Sign, a commissioned study conducted by Forrester Consulting on behalf of Adobe, January 2022.