

Generate Documents in Salesforce

Nintex Drawloop® lets you create documents directly in Salesforce using any combination of Word, Excel, PowerPoint, or PDF document templates.

Standard user / month \$12	Enterprise user / month \$18
---	---

Any Data	SALESFORCE DATA		
	Standard and Custom Objects	●	●
	Salesforce Reports	●	●
	Multi-currency Support	●	●
	Person Accounts	●	●
	Service Cloud, Sales Cloud, Force.com	●	●
	APEX AND EXTERNAL DATA		
	Salesforce External Objects	●	●
	Expand Salesforce formulas using Excel as middleware Salesforce External Objects		●
	Aggregate data for analytics		●
	Legacy systems, Third-Party API, or other external database (Excel, etc.)		●
	Restructure data for unlimited customization		●
	COMPONENT LIBRARY		
	Allows management of rich text excerpts to assemble documents from a single template		
	<ul style="list-style-type: none"> Reuse blocks of text across multiple documents and Document Packages Add business logic and filters to create and update one to hundreds of documents from a single template Use Component Groups to use multiple components using a single document tag Retain formatting and adjust paragraphs, numbering, and indentation when using multi-level lists 		●
SECURITY			
Authorize Salesforce profiles, user groups, and permission sets to access Document Packages	●	●	
Certifications: ISO 27001, SSAE 16, and U.S. Department of Commerce Safe Harbor Click here to see our System Status and Monthly Uptime	●	●	
WORD, EXCEL, AND POWERPOINT			
Merge line items and other data into rows (row replication)	●	●	
Use conditional formatting to highlight important values	●	●	
Use native Word formulas to merge dynamic text	●	●	
Merge data into multiple Word, Excel, and PowerPoint documents or combine multiple documents into a single document	●	●	
Merge line items and other data into rows, tables, sections, slides (table replication)		●	

Salesforce app

		Standard \$12 user / month	Enterprise \$18 user / month	
Any Document	Customize Word, Excel, and PowerPoint documents with logos, images, and signatures		●	
	Display data graphically with line, bar, pie, and org charts		●	
	Use Excel as middleware and update Salesforce fields with complex real-time calculations		●	
	PDF			
	Include any combination of Word, PowerPoint, Excel, Visualforce, and PDF files into a single PDF	●	●	
	Manage separate PDF docs and combine into one PDF	●	●	
	Use all pages or individual pages from Word, PowerPoint, Excel, and Visualforce templates	●	●	
	Insert data into a built-in PDF form	●	●	
	Allow your data to define text fields, checkboxes, radio buttons, list boxes, and more	●	●	
	Control field attributes like Read Only and Required	●	●	
VISUALFORCE				
Add any business logic and/or pass dynamic variables to your Visualforce pages	●	●		
Combine your Visualforce pages with any Word, Excel, PowerPoint, or PDF	●	●		
Add a cover letter, terms & conditions, and define page order of your Visualforce page	●	●		
Any Delivery	DELIVERY			
	Download or send email from any Salesforce Cloud or object	●	●	
	Connect email delivery and document generation all within Salesforce	●	●	
	Leverage third-party SMTP services for mass document generation and email	●	●	
	Post to any Chatter group	●	●	
	eSignature: DocuSign, Adobe EchoSign, e-Sign Live, Barracuda SignNow, Sertifi	●	●	
	Integrate data and connect anything to documents on Salesforce1	●	●	
	Add fax delivery option with an email address or third-party fax delivery option	●	●	
	STORAGE			
	Send and store documents via Salesforce, Amazon S3, Box, or Office 365	●	●	
Store documents to on-premises or third-party FTP(S) server, SFTP server, SharePoint, deliver Document Packages and data to an endpoint, or via LOOP Storage (see below)	●	●		
Add-Ons	EVENT DRIVEN DOCUMENT PACKAGES			
	Deliver reports daily, weekly, monthly (\$1,200 per org/ per year; 10,000 reports per year) ³	+\$	+\$	
	WORKFLOW / APEX / MASS DOCUMENT PACKAGES			
	Automatic delivery based on business rules via list view, workflow, or Apex triggered ²		+\$	
	LOOP STORAGE			
Store documents/ files via an easy-to-use interface (\$1K per org. Requires Amazon S3) ¹	+\$	+\$		

¹ Additional costs applicable for third-party services

² Additional costs will apply based on volume and users

³ Overage charge for each additional report