



# Generate Documents in Salesforce

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

<b>Standard</b>  \$12 user / month	<b>Business</b>  \$18 user / month
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Any Data	<b>SALESFORCE DATA</b>		
	Standard and Custom Objects	●	●
	Salesforce Reports	●	●
	Multi-currency Support	●	●
	Person Accounts	●	●
	Service Cloud, Sales Cloud, Force.com	●	●
	<b>APEX AND EXTERNAL DATA</b>		
	Salesforce External Objects	●	●
	Expand Salesforce formulas using Excel as middleware		●
	Aggregate data for analytics		●
	Legacy systems, Third-Party API, or other external database (Excel, etc.)		●
	Restructure data for unlimited customization		●
	<b>COMPONENT LIBRARY</b>		
	Allows management of rich text excerpts to assemble documents from a single template		
	<ul style="list-style-type: none"> <li>Reuse blocks of text across multiple documents and Document Packages</li> <li>Add business logic and filters to create and update one to hundreds of documents from a single template</li> <li>Use Component Groups to use multiple components using a single document tag</li> <li>Retain formatting and adjust paragraphs, numbering, and indentation when using multi-level lists</li> </ul>		●
<b>SECURITY</b>			
Tailor user experience via Salesforce profiles, user groups, and permission sets	●	●	
Certifications: ISO 27001, SSAE 16, and U.S. Department of Commerce Safe Harbor <a href="#">Click here to see our System Status and Monthly Uptime</a>	●	●	
Any Document	<b>WORD, EXCEL, AND POWERPOINT</b>		
	Row Replication: Merge line items and other data into rows	●	●
	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	●	●
Table Replication: Merge line items and other data into rows, tables, sections, slides		●	

# Nintex Drawloop

		Standard \$12 user / month	Business \$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		●	
	<b>PDF</b>			
	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	●	●	
	<b>VISUALFORCE</b>			
	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	<b>DELIVERY</b>			
	Download or send email from any Salesforce Cloud or object	●	●	
	Connect email delivery and document generation all withing 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 CudaSign, Sertifi	●	●	
	Integrate data and connect anything to documents on Salesforce1	●	●	
	Add fax delivery option with an email address or third-party fax delivery option	●	●	
	<b>STORAGE</b>			
	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	●	●		
Add-Ons	<b>SCHEDULED DDPs</b>			
	Deliver reports/documents to any user or contact daily, weekly, monthly (\$1,200 per org/ per year; 10,000 reports per year) <sup>3</sup>	+\$	+\$	
	<b>WORKFLOW / APEX DDPs</b>			
	Automatically deliver documents based on business rules via workflow or Apex trigger DDPs <sup>2</sup>	+\$	+\$	
<b>LOOP STORAGE</b>				
Store documents/ files via an easy-to-use interface (\$1K per org. Requires Amazon S3) <sup>1</sup>	+\$	+\$		

<sup>1</sup>Additional costs applicable for 3rd-party services

<sup>2</sup>Additional costs will apply based on volume and users

<sup>3</sup>Overage charge for each additional report