



# Nintex DocGen Helps Automotive Company Save Money and Time

Cartelligent increases productivity with the same headcount with Nintex DocGen.

**Organization**

Cartelligent

**Website**

[www.cartelligent.com](http://www.cartelligent.com)

**Industry**

Professional Services

**Country**

United States

**Business situation**

Cartelligent employees manually corrected thousands of service agreements before they could send them to clients. And purchasing agents inefficiently used third-party software to calculate monthly lease payments, extract the data as a PDF and manually upload the PDF as an attachment into Salesforce.

**Solution**

Cartelligent wanted an app that automated its document creation and narrowed the search to Nintex DocGen™ for Salesforce and Conga Composer. Nintex DocGen's data merge functionality, and user-friendly and intuitive interface stood out.

**Benefits**

Saved thousands of dollars in annual licensing fees for third-party software  
Significant improvement in data integrity and compliance  
Increased productivity without having to add headcount

# The company was limited in its ability to merge data

Cartelligent simplifies the often confusing process of buying or leasing a new car. Between researching and comparing different manufacturers, test-driving multiple models, and negotiating the features, service options and pricing, the average client saves hundreds of thousands of dollars and 20 to 30 hours when buying a new car.

The company's internal sales process, however, was anything but simple and employees were spending more time than they wanted manually creating documents.

While Cartelligent had been a Salesforce and DocuSign user for more than a decade, the company was limited in its ability to merge data and present the information in a customized and intuitive format.

"Salesforce and DocuSign are great tools that automate some parts of our contract process but we were still required to intervene manually, especially when there was complexity involved," said David Fidler, Director of Operations for Cartelligent. "We needed control over how contract information was presented, and to eliminate manually correcting our documents."

# Cartelligent discovered limitations with Conga Composer

*“It was so easy to get up and going with Nintex DocGen. Within the first week, we had five document packages live and available to the Sales team. Support was also fantastic, and it quickly became clear that there were opportunities to streamline other sales and service documents.”*

— **David Fidler**, Director of Operations,  
Cartelligent

DocuSign recommended Nintex DocGen. Cartelligent also investigated competitive solutions on the Salesforce.com AppExchange, including Conga Composer, but Nintex DocGen’s advantages quickly stood out.

The challenge with Conga Composer was that Cartelligent employees first had to create a Salesforce report in order to merge and feed data into a document. Users were also required to maintain these reports to ensure that they have the most up-to-date data. Nintex DocGen’s document generation’s merge functionality required no reports and was simply based on a field tagger that automatically feeds data into a document template.

“Nintex DocGen outshined Conga on so many levels, one being the ability to simply tag fields and then merge data directly into our documents,” David said. “We also appreciated how their user interface seamlessly integrated with Salesforce, streamlining the entire document generation process from start to finish.”

# Five document packages within just five weeks

The first document that Cartelligent automated with Nintex DocGen was the initial customer service agreement. The document included data like the make and model of the car, the client contract information, legal terms and conditions, and other contract-required information.

Nintex DocGen's merge flexibility meant Cartelligent could redesign its service agreement and present information in a more engaging way. And Nintex DocGen's integration with DocuSign allowed seamless delivery to the client for a signature.

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# Error-free documents and a consistent brand image



Among those additional document opportunities? Quotes. Prior to Nintex DocGen, purchasing agents used a third-party program to calculate the monthly payments, licensing fees and sales tax. This tedious process required that agents manually enter the data into both Salesforce and the third-party program. Once the third-party program calculated the payments, the data was exported as a PDF and manually attached to the Salesforce record.

With Nintex DocGej, Cartelligent automated the entire process within Salesforce. The company uses Excel as a middleware pricing engine, which is automatically pre-populated with Salesforce data. Once the pricing calculations are made, pricing or leasing information automatically feeds back into Salesforce.

“Our Sales team loves how Nintex DocGen has improved their jobs and that they can generate a document package with literally a click of a button,” David said. “We’ve also been able to eliminate the third-party pricing software, which has saved the company thousands of dollars in licensing costs each year.” Approximately 90 percent of the company now uses Nintex DocGen to make their jobs more efficient, from purchasing to sales to office support.

“Document generation has allowed our staff to scale their productivity without adding a single headcount resource,” David said. “We also appreciate the consistent brand image we are presenting to the public and that we are providing error-free documents.”

## 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. Learn more by visiting [www.nintex.com](http://www.nintex.com) and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

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