



Documents at the speed of business

Nintex Drawloop DocGen® for Salesforce is helping Commercial Enterprises

Nintex Drawloop is an app that automates the generation and delivery process of documents by leveraging data stored inside or outside of Salesforce. This easy-to-use software solution allows you to create compliant and consistent documents while reducing human error from manual document generation.

Quickly and easily generate a wide range of documents in PDF, Word, Excel, and PowerPoint formats.

Sales

PROPOSALS

Nintex Drawloop enables the creation of consistent Sales proposals incorporating data from Salesforce and other sources, creating standardized, on-brand templates.

CONTRACTS

With Nintex Drawloop, eliminate the tedious and manual contract process, while removing unnecessary risks such as contracts living on individual seller's devices.

QUOTES

Use Nintex Drawloop to automate the process of quote creation while eliminating incorrect terms and manual one-off quote creation using Word or Excel.

Marketing

RFPS

Seamlessly create proposals leveraging the latest brand guidelines and reduce manual errors by using Nintex Drawloop.

BRIEFS

Ensure consistency across the team and accelerate brief creation by leveraging templates optimized with pre-designed content libraries.

CREATIVE

Nintex Drawloop and advanced workflows enable the process to move quickly by automating the approval flow and reducing the number of emails and follow-ups required.

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Put the power of Nintex Drawloop DocGen® to work today.
Request a free trial on the AppExchange.

nintex.com

Service

SOWs

With Nintex Drawloop, ensure statements of work are clearly documented and timelines/deliverables are defined, leveraging content libraries of standardized services and terms.

WORK ORDERS

Use Forms, Nintex Drawloop and advanced workflows to automate the scheduling and follow-up to ensure work is performed as directed.

REPORTING

Aggregate data from multiple sources to enhance the efficiency of regulatory, nonfinancial, and risk reporting. Eliminate or reduce the time-consuming processes of collecting, compiling, and summarizing large amounts of information.

Legal

CONTRACTS

Customizable workflows automatically route documents to expedite reviews, redlining, approvals, and eSignature options making contract lifecycle management easy.

NDAS

Nintex Drawloop and advanced workflows enable standardized agreements that route automatically for eSignatures, making the creation and collection of NDAs quick, easy, and secure.

TERM SHEETS

Leverage a content library of standard terms to gain alignment with partners or vendors. Utilize data in Salesforce to dynamically drive the right terms within each document.

Finance

PURCHASE ORDERS

Nintex Drawloop enables the creation of easy to create, standard templates to ensure vendors are clear on what has been agreed to. Pull pricing and quantities from Salesforce to ensure accuracy and consistency.

INVOICES

Automatically generate and send invoices within email copy, as an attached document, or both. Leverage Excel to drive automatic calculations for custom pricing on invoices.

AGREEMENTS

Customizable workflows automatically route documents to expedite reviews, approvals, and eSignature, making sign-offs easy.

Human Resources

OFFER LETTERS/ONBOARDING

Streamline the hiring and onboarding process, incorporating modern forms and automation to deliver a best-in-class experience while eliminating costs and driving transparency.

EMPLOYEE REVIEWS

Leverage Nintex Drawloop for one-click deployment or automated reviews, creating a simple and consistent review process that's easy for both employees and managers.

AGREEMENTS

Nintex Drawloop and customizable workflows automatically route documents to expedite reviews and approvals, and eSignature options make sign-offs easy.

NONCOMPETE

Leverage Nintex Drawloop to easily update non-compete documents and automatically send to both parties for eSignature.

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