

Nintex Document Generation for Salesforce (formerly Drawloop)

Automatically create your business-critical documents directly in Salesforce using any combination of Word, Excel, PowerPoint, PDF, or Visualforce pages. Work across Classic, Lightning and the Salesforce1 Mobile experiences.

		Standard \$12 user / month*	Enterprise \$18 user / month*
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 (VISIT OUR SECURITY AND STATUS PAGES)		
Authorize Salesforce profiles, user groups, and permission sets to access Document Packages	●	●	
Any Document	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)		●	

*Requires minimum purchase amount of \$ 1440 USD per company per year

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Any Document	WORD, EXCEL, AND POWERPOINT (CONTINUED)		
	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 ext 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	●	●
	Add fax delivery option with an email address or third-party fax delivery option	●	●
	Send emails via Salesforce or SMTP, using data driven documents created through Word templates		●
	STORAGE		
	Send and store documents via Salesforce, 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	●	●	
Add-Ons	SCHEDULED DOCUMENT PACKAGES		
	Deliver reports daily, weekly, monthly	+\$	+\$
	WORKFLOW / APEX / MASS DOCUMENT PACKAGES		
Automatic delivery based on business rules via list view, workflow, or Apex triggered	NA	+\$	

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