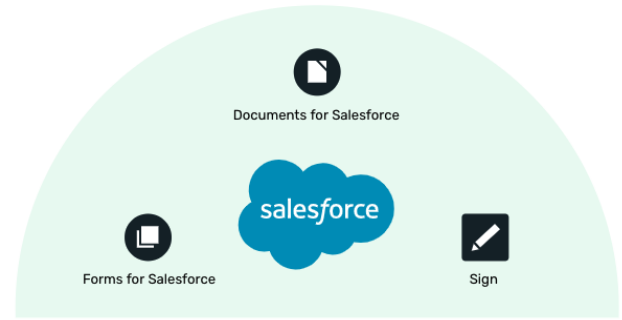# Formstack for Salesforce

Get to know Formstack for Salesforce

Formstack for Salesforce is an all-in-one forms, documents, and digital signature solution that empowers anyone to automate processes and streamline the customer experience—without needing to leave Salesforce. Our solutions work seamlessly with your Salesforce system to eliminate data silos and avoid the hassle of managing multiple systems teams.

Forms for Salesforce
Use our drag-and-drop builder to create powerful forms directly in Salesforce. Dynamically prefill data from any object to reimagine your form experience.

- Dynamically prefill forms
- Generate and update records
- Eliminate repetitive form fills
- Connect to any standard or custom object

Documents for Salesforce
Digitize paper processes with a document automation solution that lives right in your Salesforce org. Build automations, create buttons, connect to forms, and more.

- Build document automation
- Connect to Salesforce forms
- Send document for eSignature
- Add document generation buttons to records

Formstack Sign
Automatically send your Salesforce documents for digital signature. Easily set up reminders and upload completed documents to Salesforce records.

- Automate eSignature collection
- Schedule reminders
- Enable mobile signing
- Upload signed documents to records

Achieve your Salesforce vision with Formstack

Turn Salesforce into your single source of truth
Leverage data prefill for every moment in the experience for your end user to ensure your instance is not another data silo, but a database that powers process vs. holding it back.

Create great customer experiences - we believe your customers should never have to fill out the same info twice
Enabling prefilled forms reduces repetitive tasks and significantly accelerates business processes.

Deliver on Digital Transformation efforts
From data collection to document generation and digital signature, these modular solutions set you up to use the right set of tools to fit your specific business needs.

Work smarter with Formstack for Salesforce

Build workflows that streamline internal processes and provide the best possible experience for your customers. Empower your team with the tools to efficiently manage Salesforce data.

Healthcare
Patient Onboarding
Patient Discharge
Specialist Referrals

Higher Education
Student Interest Forms
Applications
Enrollment

Government
Business Loans
Permit Renewals
Project Proposals

Financial Services
Loan Application
Client Application
Direct Deposit Forms

Insurance
Annual Renewal
Quote Generation
Policy Signing

Marketing
Lead Capture
Event Registration
Customer Surveys

Operations
Internal Requests
Budget Approval
Receipt Generation

HR
Applications
Employee Onboarding
Annual Review

IT
IT Support Requests
Equipment Check Out
Software Update Notifications

 formstack   Learn more at **formstack.com/salesforce** or visit our listing in the Salesforce AppExchange.