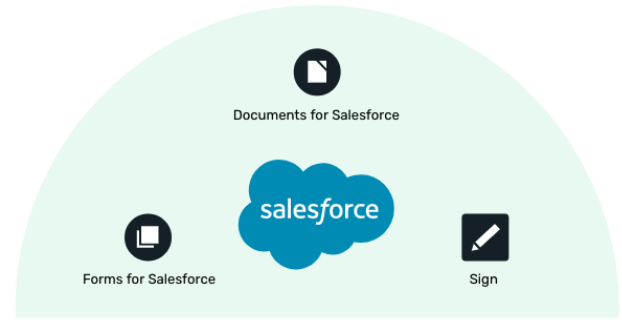


Formstack for Salesforce

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

Realize your Salesforce vision with Formstack



Maximize your Salesforce investment

Create a seamless experience for data gathering, document automation, and digital signature collection. Make better decisions with a 360-degree view of your customers.



Build a community of power users

Empower departmental problem solvers to build more streamlined processes and champion digital transformation across the organization.



Reimagine the customer experience

Streamline customer management by progressively building on customers profiles, automating manual tasks, and reducing the time it takes to complete processes.

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