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Interactive Document Generation for Salesforce - NO CODE

If you've been looking for a way to generate interactive dynamic Salesforce documents with no coding required, we have the solution.

Data runs our world. If you work for a large company or are self-employed, collecting, managing, and tracking data can require an unmanageable amount of energy and effort. Efficiency and simplicity may be the name of the game, however not every solution adapts to your specific systems and processes. We won't sacrifice functionality for saving time or money, and vice versa and neither should you. Instead of manually entering data into Salesforce, which is tedious and leads to mistakes, why not turn to an all-in-one platform that does the heavy lifting for you?

That's what you get with FormTitan. Our no code digital platform provides you the necessary tools to build and generate Salesforce forms, documents, and portals. We offer comprehensive features to create all kinds of forms and documents for various industries, such as event registration forms, customer satisfaction surveys, medical records, and much more. Typically when working with Salesforce documents, one needs to use a Salesforce SOQL (Salesforce Object Query Language) query to search for and retrieve your organization's Salesforce data. But with Titan Docs, understanding this programming language is not required.

No code, just clicks.

In this guide, we'll walk you through the options for Salesforce data collection and dive into why our integrated document generation product is the best choice. Of course, we have included plenty of examples, real-life use cases, and video tutorials to help.

Read through the entire guide to learn about how to generate dynamic documents, the different ways to integrate these documents and your data with Salesforce, and more. We want to empower you to go forth and transform the way you work with data.

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- **What is Salesforce?**
 - Salesforce is the leading cloud-based customer relationship management (CRM) platform. Founded in 1999 to help sales teams improve their interactions with prospects and customers, Salesforce is the best choice for housing all of your company's data. Today, it has evolved into the software that drives the backend of over 100,000 businesses around the world.
- **What kind of data would I want to import into Salesforce?**
 - Need to keep track of internal or external company data? Salesforce allows you to import the information imperative to run your business. Here are a few examples of the types of data you would want to import:
 - **New and returning customer data**
 - **Sensitive patient data in healthcare**

- Survey data such as customer or employee satisfaction, market research, and exit interview
 - Donor or grantee profiles, project or grant reports, and annual reports
 - Cases, allow a customer to open a case from a web form rather than email to case
 - Lead generation, collect leads verify and prevent duplicates via online form integrated with Salesforce
 - Account and Contact form, update records in Salesforce of any object.
- What are my options for importing data?
 - When it's time to put data into Salesforce, entering it manually is time-consuming and prone to human error. You want this arduous process automated and efficient. Here are a few user-friendly options:
 - **Data Loader** — A universal tool that uploads bulk amounts of data and information from systems without Salesforce integration like Excel spreadsheets.
 - **Native Salesforce features** — Salesforce offers internal applications such as Web-to-lead, which supports lead generation through creating forms that capture information about visitors to your website, or Web-to-case, which gathers customer support requests directly from the company website. While helpful, these applications have limitations that may prevent you from meeting your individual needs.
 - **External Salesforce form platforms that input data directly into Salesforce** — We think this option, which we'll cover in the rest of the guide, provides the most bang for your buck. Our [no-code, digital platform](#) contains capabilities beyond the native Salesforce features, including complete customization, form and document generation, drag & drop, and visual integration. We make implementing complex custom solutions painless.
 - When would I want to use an external data collection tool to send data to Salesforce?
 - As discussed above, external data collection tools, like Titan, offer seamless, powerful integration capabilities with Salesforce beyond their built-in tools. With our all-in-one digital platform, you can create, build, and

design flexible forms and documents that import and export data efficiently.

- **What Documents Can I Generate?**

- **Contracts** — Contracts can be complicated and involve time-consuming back and forth. With Salesforce contracts, you can create, track, and manage your documents to ensure your company, accounts, and clients are on the same page.
- **Quotes** — No two projects are the same, so you need to have flexibility in your price quotes. With Salesforce, create automated price quote documents tailored to your customers' requirements.
- **Proposals** — Writing impactful, customized proposals to win clients is a high-pressure situation, demanding your team's time, creativity, and brainpower. Salesforce helps you churn out and deliver dynamic business proposals that will put you ahead of the competition.
- **Invoices** — Paying and getting paid on time not only causes fewer headaches but builds trust with internal and external partners, bettering your reputation in the business world. Automating the invoice process with Salesforce documents will expedite the payment process and make your financial transactions as smooth as possible.
- **Inventories** — For large and small companies, tracking and managing inventory brings challenges like inaccurate data, inefficient processes, and inconsistency. Streamline the process and keep your inventories organized with Salesforce inventory document templates.
- **Resume** — Certain jobs may require you to highlight different skills and experiences in your resume. Instead of creating a new document each time, pull the data you need from Salesforce to tailor your resume as needed.

- **How do I start creating a document?**

- Titan Docs allows you to use templates or create your own branded documents, including PDF, HTML, Microsoft Excel, and Microsoft Word. These documents can be generated directly from Salesforce via a [button](#), through our innovative MS Word add-in, or with standard automation Salesforce tools such as [Process Builder](#), [Flow](#), [APEX](#), and [Outbound messages](#).

● Features and Scenarios

- As discussed above, the native features Salesforce offers might not always meet your company's specific needs. With Titan's all-in-one platform containing state-of-the-art technology and no-code products connected seamlessly, you can adapt your forms to fit your situation.
- **Salesforce Integration - Standard and Custom Objects and Fields**
 - Titan Docs gives users the ability to feature data from multiple standard and custom objects in a document. Because of the bi-directional integration, you can sync from Salesforce at every step of the way and bring data from any object to any field you like. In addition, each field can be set to bring information from the CRM and send data to it. The data you need is always accessible from these objects and fields.
 - **PUSH data to Salesforce**
 - When you generate your documents, the ["Push" integration](#) authorizes users to write to standard and custom Salesforce objects, permitting you to create, update, and delete Salesforce records in real-time.
 - **GET data from Salesforce**
 - The ["Get" integration](#) feature enables you to read data from any custom or standard Salesforce object to populate your document fields and trigger actions in real-time.
 - **Using one field that GETS and PUSHES**
 - Unlike most applications, Titan Docs offer a powerful dual integration with Salesforce, meaning that a field can both [push data into Salesforce objects and get data from Salesforce objects](#) for your documents.
- [Conditional Logic](#)
 - Organizations that use Titan Docs often require complex logic built into their forms, documents, portals, and surveys. Luckily for them, Titan Docs makes all of that simple. Conditional logic is

accomplished with clicks only, allowing you to control any field behaviors and trigger the results you want. For example, you can design a document that shows users only the fields relevant to them.

Now, let's explore some of the basic features and methods of document generation Titan Docs provides. Titan Docs allows you to generate documents in the most common and widely-used document formats, specifically the Docx., PDF, XLS., and HTML formats.

- **Generating Documents from Your Forms**
 - You can generate documents directly from Salesforce using the forms you created or from Salesforce flows, which builds complex business automation using clicks instead of code. One common use case is to trigger a document generation once a form or an application form is submitted.
- **Generating Documents Directly from Salesforce**
 - FormTitan offers the ability to generate documents directly from Salesforce through the FormTitan button (FT button), a Salesforce button that opens a modal window from where you can trigger document generation. Once installed, users can add the FT button to their dynamic page layout in standard and custom objects and configure it to generate and send PDFs and Word documents.
- **Microsoft Word Add-In**
 - FormTitan's Word composer allows you to merge fields from multiple Salesforce custom objects directly into Microsoft Word. FormTitan's Word add-in generates documents based on Salesforce directly from the word processing program or creates templates for future use.
- **Generating PDFs**
 - **Basic PDF**
 - To turn a paper form into a PDF, scan your paper document, upload it as an image or pdf file, and you can add the same fields and content featured on the original form.
 - **Auto PDF**
 - Titan Docs' Auto PDF option takes a screenshot of your submitted form and generates it into a PDF. Once generated, upload it into the [attachment Salesforce object](#), attach it to the [Salesforce record in Files object](#), or email the PDF.

- **Dynamic PDF**
 - Generate a dynamic PDF through HTML code on which you can map any Salesforce data you want, include a table displaying multiple records, add objects from opportunities, and more.
- **Interactive PDFs**
 - Turn on the Interactive mode in your [basic](#) and [dynamic PDF](#) and the filler can click and edit the fields inside the generated PDF.
- **Microsoft Excel Add-In**
 - FormTitan's Microsoft Excel Composer allows you to merge fields from multiple objects directly into the program. The user can then generate XLS. Salesforce files based on Salesforce data directly from Excel or create Excel templates for future use.
- **Merging Documents in Salesforce**
 - With Salesforce, you can combine multiple documents of different formats and push the merged document back to Salesforce as a related attachment or file.
- **Nested Tables**
 - **Microsoft Word Add-In**
 - Through Titan Docs' Word Composer, add a table to a document, pulling the data from a Salesforce object or a [Salesforce report](#), and display it in your preferred layout.
 - **PDF with Repeated Data in Table**
 - In your dynamic PDF, you can pull opportunity data organized into a table like, for example, if you need to include inventory details on multiple products.

In the following tutorials, we will demonstrate real-life scenarios where users will implement the numerous features and capabilities of Titan Docs. The below will illustrate further why TitanForm offers the most versatile no-code document generation platform for Salesforce.

- **USE CASES - Short Descriptions with Links to pages with videos**
 - **Connect Word Doc to Salesforce**

- Watch the below tutorial to take your standard Word document to the next level through integration with Salesforce.
- [Tutorial: Configure Your Document using Titan Word Add-In](#)
- Basic Contract Document
 - This end-to-end case will demonstrate how to build a simple business document, in this case, a service contract agreement. The fundamentals of Titan Docs exhibited in this tutorial will set you up to generate a variety of other documents as well.
 - [Tutorial: How to Build a Basic Document](#)
- Create a Quote Template
 - This in-depth tutorial shows you how to create a multi-level quote document template using the Word Add-In and other dynamic Salesforce capabilities, including working with tables, [barcodes](#) and adding a [signature element](#) users can fill out online.
 - [Tutorial: Create a Quote Document](#)
- Build a Management Report
 - Reports are a necessary nuisance of working in business, and they demand dedication and a lot of time and energy that could be applied elsewhere. Thankfully, Titan Docs' generation tools will expedite the process while helping teams craft comprehensive reports with consistency. This tutorial will lead users through building a management report through Microsoft Word.
 - [Watch: Build a Management Report with Word Add-In Tool](#)
- Generate Invoice
 - Titan Docs lets you pull objects and fields directly from Salesforce to populate your company-branded invoice document. This tutorial walks users through generating a dynamic invoice to send to their customers after receiving a Salesforce order form.
 - [Watch: How to Generate an Invoice Document](#)

This guide is just a sampling of the extensive features we offer for generating smart Salesforce documents with Titan Docs. We would love to hear more about your use case, so [schedule a 30-minute demo](#) today. Check out our YouTube channel [Titan 101](#) for more video tutorials. For information on more of Titan's products, please [visit our website](#).