

The ONLY Native Document Generator for Salesforce

KEY FEATURES

- **SUPERIOR ARCHITECTURE**
100% Native Force.com. There simply is no solution more secure or robust than a native app.
- **MORE POWERFUL THAN MAIL MERGE**
Our powerful document engine can sort, filter, group and conditionally render any Salesforce data from any object into a PDF, Word or Excel document.
- **BETTER THAN EMAIL TEMPLATES**
Our built-in email engine completely automates generating and sending emails. It's faster, easier to use and has more capabilities and security controls.
- **SEAMLESSLY INTEGRATED**
User interface is completely integrated with Salesforce look-and-feel. Optionally integrates with external storage and E-Signature solutions.

IMPROVE EFFICIENCY WITH THE SMARTEST DOCUMENT GENERATOR ON THE APPEXCHANGE

Are you manually editing documents, reports or emails because you can't get the data you need, or it doesn't look the way you want? Are you struggling with Salesforce out-of-box capabilities?

S-Docs puts an end to the wasted time and mistakes caused by copying and pasting information from Salesforce to your existing documents, forms, reports, emails and templates.

With a single click, S-Docs allows you to create sophisticated documents that improve efficiency, reduce errors and eliminate tedious work.

S-Docs is the ONLY 100% Native document generator available on the Salesforce AppExchange. Native means we don't host any external servers and therefore we deliver a superior product at a lower cost. Unlike our competitors, we leverage the Salesforce platform paid for by your existing Salesforce licenses. So why pay twice for infrastructure? Especially when it introduces security, reliability and performance risks. With S-Docs, you benefit from superior architecture at the lowest cost - guaranteed!

Simple. Smart. Secure

Product Architecture

S-Docs is the better choice

S-Docs is the ONLY 100% Native Force.com Document Generator - it is exclusively built for and entirely exists on the Salesforce platform. S-Docs code resides inside your existing Salesforce org, which is hosted, managed and delivered by Salesforce. It essentially is Salesforce.

All other solutions send your data off the Salesforce Cloud for processing and then must integrate. They were developed at a time before Salesforce had this capability. And, rather than having to rebuild and provide an upgrade path for their existing customers, our competitors continued to build on their old framework. This results in a disconnected user experience, administration overhead, and sharing your sensitive customer data with externally systems. And what's more, you would have to pay for this unnecessary infrastructure despite having superior capability available on the Salesforce platform without additional cost.

S-Docs is simply a better solution with the benefit of a lower total cost of ownership.



“NO LIMITS” STATUS

In addition to being 100% Native, S-Docs is also classified as an “No Limits” app. This means it doesn't count against your Salesforce system limits for custom apps, tabs, and objects.

The S-Docs Advantage

- Your data never leaves the Salesforce platform
- Your IT Security Team has already vetted and approved your use of the Salesforce platform where S-Docs exists
- Removes integration hassles. No need to configure and maintain external access points or services
- API callouts are not required, therefore preserves those limits.
- Full set of S-Docs REST APIs available for use, if needed.
- Maintains Salesforce look-and-feel. Leverages same styles, navigation, buttons and labels, so it's familiar to users
- No need to provision users in secondary system
- No downloads of any kind
- No sharing of user information, session IDs or tokens
- Works seamlessly with other Salesforce technologies (Salesforce1, Communities, Shield Encryption, Lightning Experience, Process Builder and many more)

100% NATIVE MEANS:

- Lower Licensing Cost
- More secure
- More Reliable
- Easier to Configure
- Easier to Maintain
- Better Performance
- Tighter Integration
- Lower Cost of Ownership

User Benefits

Feature-Rich Documents

Account Summary For:			
Burlington Textiles Corp.			
Prepared on: September 02, 2016	Prepared by: Jeff Largrin	Page: 1 of 4	
ACCOUNT DETAILS			
Shipping Address 45 Erie Park Long Beach, California 90840	Account Number 367	Annual Revenue \$31,274	
Billing Address 45 Erie Park Long Beach, California 90840	Type / Rating Customer / Hot	Industry Customer / Engineering	
Account Owner Jeff Largrin IT mesysllc@gmail.com	Custom Label 1	Custom Data 1	
Custom Label 2	Custom Label 3	Custom Data 3	
Open Opportunities [1] Total: 80,000.00	Won Opportunities YTD [2] Total: 160,888.00	Opportunity Win/Loss Chart:	
Open Cases [3] [Oldest: 6/28/2016]	Closed Cases [0] [YTD: 0]		
Custom Label 4	Custom Data 4		
CONTACTS			
Name	Title	Email	Phone
 Marc Walters	Senior Vice President and Chief Financial Officer	jalexander4q@dot.gov	1-(702)958-8487
<p>Marc, Senior Vice President and Chief Financial Officer of Starke. In this role, Mr. Walters leads the U.S. Finance organization, including direct oversight of the U.S. Controller Group, in Home Office and indirect oversight of the field finance teams across the 4 Zones and stake. In addition to Finance he is responsible for U.S. Development and Supply Chain functions. He engages with franchisees through the and co-leadership of the System Economics Team. In addition, Mr. Walters represents Starke on the Company's Global Finance People Board, the Global Finance Management Team and is the Treasurer for the Political Action Committee (PAC). Prior to his current position, he was Vice President and Assistant Controller of Starke for five years. He also spent a year as Senior Director of Investor Relations, where he was responsible for keeping investors and analysts informed and enthusiastic about Starke.</p>			
 Shelly Robertson	CEO	shellyrobertson@sdocs.com	1-(704)287-7149
<p>As the CEO of Starke, Shelly is responsible for running all facets of the business. Shelly has a proven executive management track record and over 20 years of experience driving sales growth in the technology industry. Prior to joining, Shelly was Chief Marketing Officer and Executive Vice President of Sales for Acme, Inc, responsible for all global sales and marketing activities. At Acme she led the transformation into an enterprise-focused company while growing sales 50% year over year. Previously, she served as Chief Marketing Officer of North Communications, where she led the design and implementation of all sales and</p>			

GENERATE:

- Proposals
- Reports
- Emails
- Invoices
- Account Plans
- Application Forms
- Sales Quotes
- Contracts
- Product Info Sheets
- Claim Forms
- Support Correspondence
- Welcome Letters

COMPATIBILITY

Salesforce Editions:

- Developer
- Enterprise
- Performance
- Unlimited
- Force.com

Works with:

- Custom Objects
- Communities
- Lightning Experience
- Salesforce1
- Person Accounts
- Shield Encryption
- Translation Workbench
- Int'l Character Sets
- 3rd Party Apps
- E-Signature Solutions
- Visual Workflow
- Process Builder
- ...and more

Browsers:

- Works on all Salesforce supported browsers and mobile devices

OUTPUT TO:

- MS Word
- PDF
- MS Excel
- Google Drive
- Amazon S3
- Direct to email

Incredibly Powerful, Remarkably Simple

Open a record, choose a document and click generate - it's that simple.

Documents are immediately created and automatically added as a related list item that can be viewed, printed, emailed or linked to other Salesforce records.

You can select from a large library of templates that can be categorized and searched. Templates can be pre-selected or access can be restricted based on permissions, language, region or any sharing rules. You can track a document status, automate follow-up tasks or send the document through your e-signature provider. And, S-Docs is available on-the-go with the Salesforce1 mobile app.

With S-Docs, the entire document creation process can even be automated by leveraging point-and-click tools such as Process Builder. This allows data changes to drive the document generation and distribution process without any coding.

If you have ad-hoc documents that need to be generated in batch, S-Docs also provides a simple method to bulk generate documents from any Salesforce list view.

Administrator Benefits

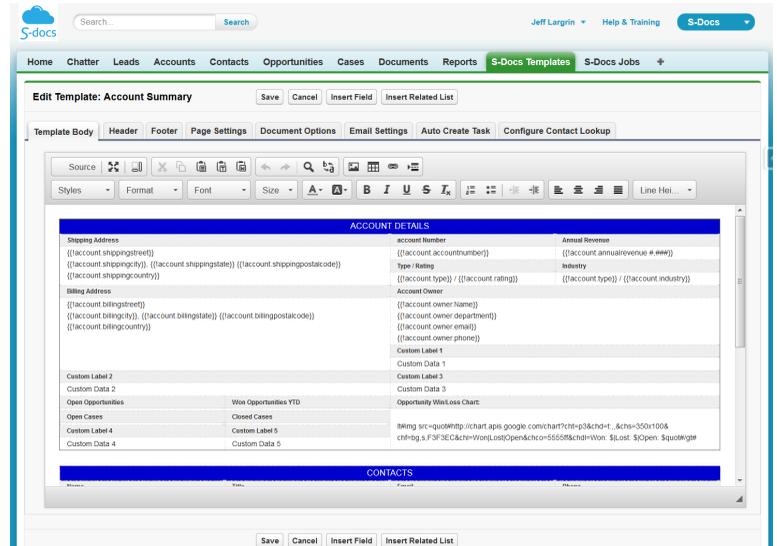
Template Editor Gives Users Control

S-Docs leverages a powerful web-based graphical editor that is designed for non-programmers; No Visualforce, Apex coding or design software is needed.

The editor lets you to define the layout, change fonts and styles, and easily browse and merge your Salesforce data to achieve a pixel-perfect document.

S-Docs templates are simpler to build than Salesforce reports, quotes or email templates, yet much more powerful. Templates are stored and managed as Salesforce records, so changes can be implemented without the complexity and delay of package deployments.

With its many advanced features, S-Docs let's you merge any Salesforce data and apply a multitude of dynamic formatting options that can satisfy even the most complex document requirements.



HTML5

S-Docs, including the Template Editor, is built entirely on HTML5. There are no downloads, add-ons, plugins or installs.

PROFESSIONAL SERVICES

Don't have time or the resources to create your own templates? Let us do it for you! Our professionals can setup up S-Docs and create your documents at a very reasonable cost. We can create most templates for a flat fee. Contact us at sales@sdocs.com for more information.

The S-Docs Advantage

- Point-and-click template editor is designed for non-programmers; No Visualforce, Apex coding or deployments needed.
- Allows you to automate the entire generation process without any code using Salesforce workflow or Process Builder
- Easily modify fonts, styles, tables, borders, colors, images, page-breaks and insert data using an intuitive graphical editor
- Allows you to include rich text and dynamic images, graphs and charts
- Automatic formatting of dates and currencies
- Supports Headers, Footers, and Page Numbering
- Power features include embedded SOQL queries that support advanced features such as aggregates and sub-queries
- Conditional Rendering give you the ability to dynamically show or hide document content based on data values
- Flexible display of related data that can be filtered, sorted, grouped, subtotaled or span multiple rows or columns

BUILT-IN EDITOR

- No Apex or Visualforce
- No downloads
- No code deployments
- Powerful editing features
- Meta-data driven

Features and Pricing



Feature



Not Available

Feature / Benefit Description	S-Docs Free	S-Docs Unlimited
Cost: Per User/ Month (Billed Annually) [Volume discounts begin at 50+ licenses, 10 License Minimum for S-Docs Unlimited]	\$0	Contact Us
Template Limits (Maximum number of active templates allowed in an org)	2	None
Minimum License Purchase (Minimum S-Docs license count required for purchase)	N/A	10
Batch Generate Documents from any Salesforce list view	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Generate Documents via Workflow, Process Builder, Apex, triggers or REST API	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Programmatically Generate and Email document as any Salesforce user	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Integrates with Google Drive and Amazon S3 for document storage	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Integrates with most popular third party E-Signature solutions	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Per document charge or restrictions on total number of generated documents	None	None
Technical Support (General Troubleshooting and Setup)	Forums only	Included
Professional Services & Custom Template Design Service	<input type="checkbox"/>	Available for additional fee
Custom Object Integration Support	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client specific enhancement/customization requests	<input type="checkbox"/>	Available for additional fee
Upgradable to future versions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Additional Features

- Feature Included
- Requires editing HTML
- Not Available

100% Native Force.com App	Free	SD-U
* COMPLETE DATA LOCKDOWN. No external web service callouts, no external SOAP requests, no REST URI requests and no querystring submissions to external servers are needed to use S-Docs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* No additional user provisioning needed (access controlled through standard Salesforce permissions)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Single-Sign-On ready. Works with your existing SSO methods. No user credentials are needed or shared with any other system (user data stays within Salesforce)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* No in-memory data processing- Data is not cached or accessible outside of Salesforce	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Maximum scalability and uptime- S-Docs does not depend on external server availability, and is not subject to performance issues or outages caused by third party vendors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Central Document Version Control - templates are centrally administered and retrieved real-time during document generation. Users do not need access to any shared network drives	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Uses Salesforce record-level security model- Document visibility automatically inherited from and controlled by parent record permissions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Uses Salesforce data-level security model - Queries execute under user context, assuring only authorized data is accessible	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Document Generation Features	Free	SD-U
* Output to Multiple formats (PDF, MS Word, MS XLS, HTML, XML, CSV)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Compatible with MS Office 2007-2013, and Mac O/S	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Built on HTML5 and VisualForce that works with any browser [no plug-ins, flash files or downloads]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Supports document creation, viewing and emailing from any device including mobile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Search, Select and Create Multiple Documents at once	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Simplified One-Click document create option (i.e. allow custom button to auto-select, generate and email preselected documents)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Filter Templates. Allow button parameters to filter templates based on language, category, or any custom criteria	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Searchable Template Library controlled by Salesforce Profiles and Record Sharing Rules	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Suggest templates to user based on popularity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Allows users to select which related contact records to merge at run-time during document creation process	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Supports adding private notes to any generated document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Ability to edit PDFs on-line after generation. Eliminates need to download, save and upload document to support editing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Document Generation Features (cont.)	Free	SD-U
* Integrates with other Force.com platform applications and other third party Salesforce apps	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Auto-create follow-up tasks upon document creation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Batch feature supports ad-hoc bulk generation of documents from any Salesforce list view	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* Batch feature supports generating and printing mailing labels from any Salesforce list view	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* Batch feature supports mass emailing of generated documents to clients or prospects	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Integrated Email	Free	SD-U
* Built-in email pop-up to easily send generated documents to clients or prospects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Auto-attach generated documents to email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Allow full-featured editing of outbound email body even when template is used to populate default content	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Browse, preview, download, attach or resend previously generated documents with a single click	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Browse and attach additional files from Salesforce documents folder to outbound emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Browse "notes and attachments" and add to email without downloading file locally	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Upload additional attachments from desktop and easily include with outbound emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Auto-populate email to, cc, bcc, subject fields with static text and/or dynamic data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Lockdown to, cc, bcc, subject and email body fields using checkboxes on template record	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Override default attachment naming convention with customized data-driven values	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Time saving "Quick Pick" feature allows selection of linked contacts without using lookup search windows	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Enable on-the-fly update of contact record data during email process	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Provide email lookups capabilities for both Salesforce user and contact records	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Automatically attach linked knowledge articles when email relates to a case object	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Enable users to select "send from" that includes global org-wide email addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Log a Salesforce activity whenever a document is emailed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Additional Features

- Feature Included
- Requires editing HTML
- Not Available

Salesforce Integration	Free	SD-U
* Add a customizable related list of generated S-Docs for any Salesforce object on any page layout	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Works with Salesforce1, Communities, Chatter, Campaigns, Salesforce Shield, force.com, Person Accounts and virtually all other Salesforce options	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Support Translation Workbench and UTF-8 character sets for Chinese, Japanese, Arabic and many other languages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Uses standard Salesforce.com UI components keeping with Salesforce.com design, fonts styles and color schemes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Customizable button labels and text allows seamless branding with existing styles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
REST API and Connected App	Free	SD-U
* Generate documents via workflow, process builder, custom triggers or via S-Docs REST API	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* Generated documents and email documents programmatically as any Salesforce user (even when off-line)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* Run batch processes from remote systems	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Graphical Template Editor	Free	SD-U
* Web-based template editor built on HTML5 standards that works on all devices including mobile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Simple point-and-click merging of standard and custom Salesforce data without setup or need to import field sets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Insert Multiple Dynamic Images (such as logos, product images, Salesforce dashboard images or charts) that can be dynamically rendered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Allows versioning to reference template change history or revert to previous versions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Insert templates within other templates to consolidate reusable components or sections like "Terms & Conditions"	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Point-and-click merging of child records and multiple related lists into tables within a single document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Graphical toolbar allows changes to fonts, styles, borders, colors, tables, page breaks and more	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Support any paper size (letter, A4, legal etc.)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Specify header, header image, first page header, pagination, footer, footer image, first page footer and pagination (for MS Word and PDF)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Supports embedding multiple Google charts into documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Advanced Template features	Free	SD-U
* Template Editor Source Mode allows customizations by anyone knowledgeable in HTML and CSS	<input type="checkbox"/>	<input type="checkbox"/>
* Supports currency and date formatting of Salesforce data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Ability to limit the number of records included in a related list	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Related list items can be filtered and sorted by multiple criteria in ascending or descending order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Related lists can be grouped and subtotaled by any column attribute	<input type="checkbox"/>	<input type="checkbox"/>
* Related list values can be merged, prefixed, or replaced dynamically	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Related list items can be grouped and separated into multiple tables by any field value, with optional repeated headers before or after grouping name	<input type="checkbox"/>	<input type="checkbox"/>
* Related lists can be displayed vertically (records appear in sections vs columns)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Option to use S-Docs's Direct SOQL feature allows embedding of any Salesforce data	<input type="checkbox"/>	<input type="checkbox"/>
* Related lists generated from direct SOQL queries respect running users permissions	<input type="checkbox"/>	<input type="checkbox"/>
* SOQL queries support aggregates (e.g. sum by group function) and offsets	<input type="checkbox"/>	<input type="checkbox"/>
* Supports SOQL subqueries that can appear as sub-rows of data within each child record	<input type="checkbox"/>	<input type="checkbox"/>
* 5 Default formatting options for related list tables with support for custom formatting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Leverages css to allow for complete pixel-perfect control of data and cell formats	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* S-Docs Render Feature allows conditional display of data, text, images via a dynamic run-time condition. Renders conditions can be complex and nested	<input type="checkbox"/>	<input type="checkbox"/>
* Can add prefix, postfix, null substitutions and value substitutions for all related list data	<input type="checkbox"/>	<input type="checkbox"/>
* Render images and rich text fields within cells of a related lists	<input type="checkbox"/>	<input type="checkbox"/>
* Fully leverage Salesforce formula fields to control data rendering	<input type="checkbox"/>	<input type="checkbox"/>
* Create specialized templates such as mailing labels	<input type="checkbox"/>	<input checked="" type="checkbox"/>

About S-Docs

In 2010, we launched S-Docs with a vision to create the first document generator built on the Salesforce Platform. We pioneered a new technology that can create sophisticated business documents without the complexity and expense of having to integrate Salesforce with external servers. This breakthrough has fueled our dramatic growth, made us a global leader in Document Generation and put us in the top 1% of all apps on the Salesforce AppExchange.

We've continued to improve our product by delivering more innovative capabilities than anyone in the marketplace while making our solution increasingly simpler to use. Today, S-Docs is used by thousands of global subscribers from all industries with a multitude of use cases, but they all share one key theme: the need for a powerful yet easy-to-use native solution.

The S-Docs team is led by a former Director and Technical Architect from Salesforce and is comprised of leading experts in Salesforce and document technologies. We have proudly adopted the 1-1-1 corporate philanthropic model to support environmental and social causes through donations as well as volunteerism.

ME2 Systems LLC, the makers of S-Docs, is privately held and incorporated in New York State.

