

Document Generation

Automate the Creation of Documents

OVERVIEW

Octiv was founded to make creating and sharing documents and presentations easy. With Octiv professionals can create, send, track, and sign documents online — on any device, anywhere. Documents and presentations can be delivered in a variety of formats to meet your business needs including HTML, Word, PowerPoint, & PDFs. The Octiv platform is designed to allow you to deliver timely, accurate, and professional documents to each and every customer.

Unlike traditional document generation providers, our platform is easy to use, setup, and deploy across your organization. With Octiv, there is no query writing or APEX coding required. Octiv’s administrative functionality to manage templates and merge data into your document is built for the regular business user. Octiv provides the most powerful way to create documents and presentations from data than any other solution on the market.

USER BENEFITS

- Reduce time spent on document creation
- Automate the creation of standard documents
- Eliminate document errors
- Enforce branding and formatting
- Streamline business processes
- Improve user experience

DOCUMENT GENERATION IS IDEAL FOR



Agreements



Contracts



Invoices



Offer Letters



PDF Forms



Proposals



Purchase Orders



Quotes



Renewals



Statement of Work

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KEY CAPABILITIES	
Document Generation	Start from a pre-built document template or create a brand new document to address almost any use case.
Data Merge	Merge data from any external source into your documents from external data sources (CRM, CPQ, homegrown databases, forms, etc.)
Dynamic Templates	Dynamically drive the selection of the appropriate template based on the customer's situation (eg. industry, deal size, region), or business rules/logic.
Conditional Content	Ensure documents have the right messaging with logic-based rules for including/excluding content.
Workflows	Octiv uses existing workflows and business rules to route, send, and store documents.
Delivery Options	Octiv has powerful delivery options including the ability to send the document via email, send for eSignature, send to contacts automatically via our open API, save the document as an attachment in your CRM, store the document in Box, etc.
Document Repository	Archive and house all generated documents in a secure and central location.
Company Branding	Octiv lets you add your company logo, change colors, and customize emails.
API	Call the Octiv API to create documents inside any application.
Mobile Support	Create, edit, negotiate and sign documents anywhere, anytime, from any device.
Document Formats	Octiv Document, Octiv Presentation, PDF, Microsoft Word, Microsoft Powerpoint