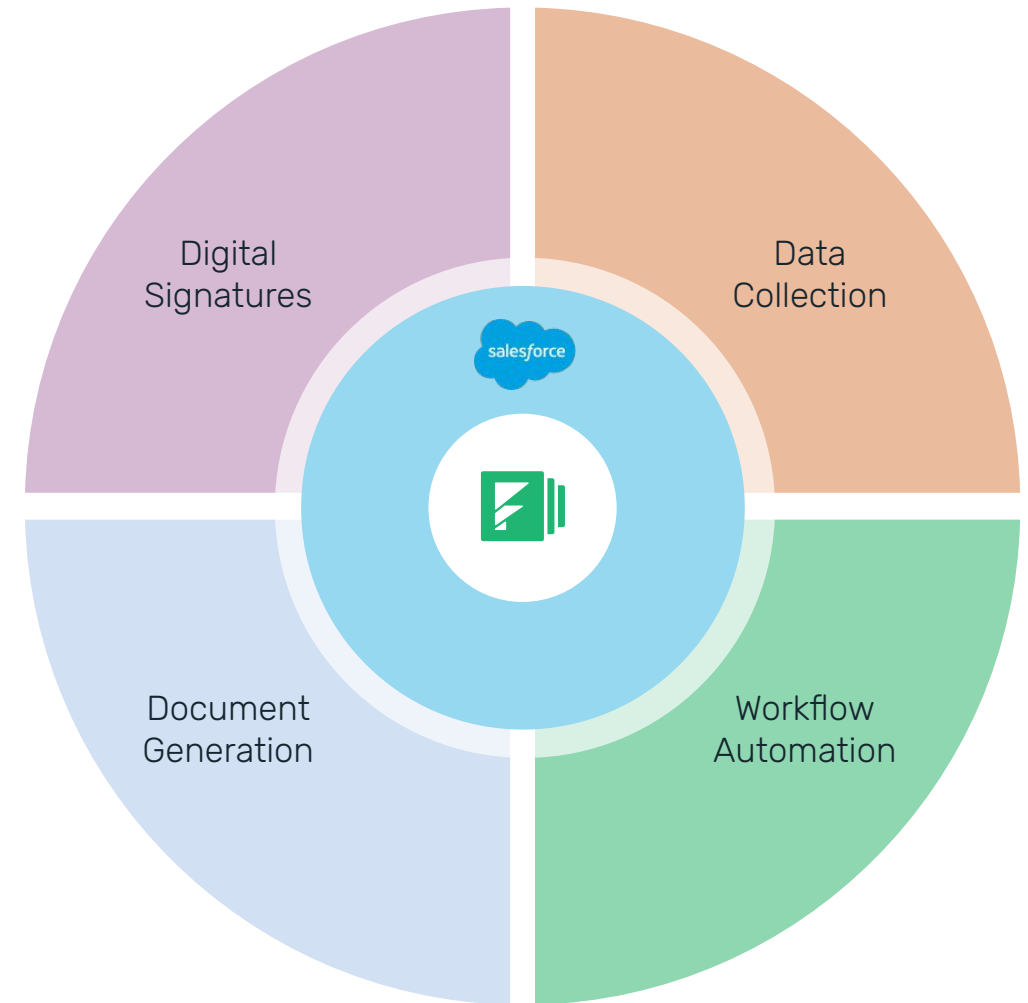


# Reimagine your data journey in Salesforce



# Navigating the solution landscape





## Forms for Salesforce

Drag-and-drop builder for creating powerful forms directly in Salesforce. Dynamically prefill data from any object to reimagine your form experience.



## Documents for Salesforce

Seamless document generator used to automate Salesforce document creation. Easily populate documents with data in just a couple clicks.



## Sign

Simple eSignature solution that empowers anyone to collect secure digital signatures for your documents and forms from any device.



# Forms for Salesforce

Drag-and-drop builder for creating powerful forms directly in Salesforce. Dynamically prefill data from any object to reimagine your form experience.

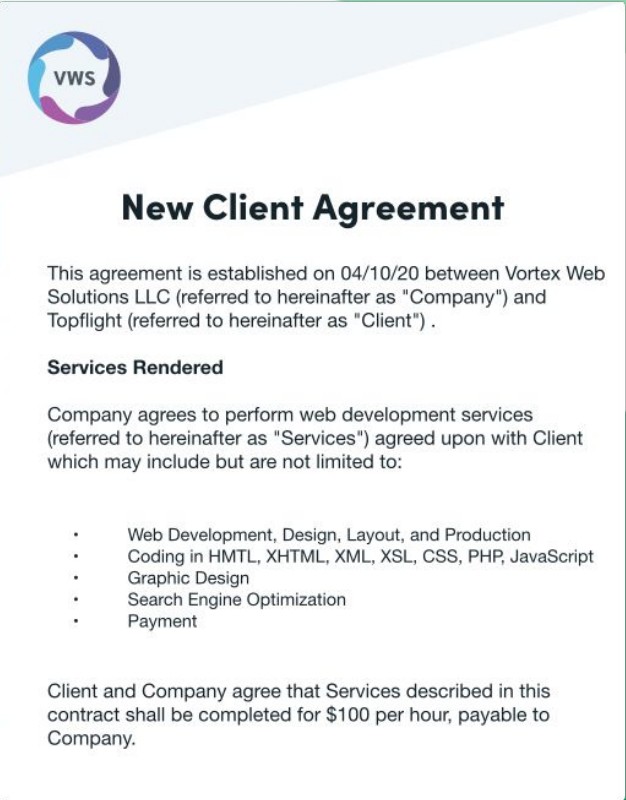
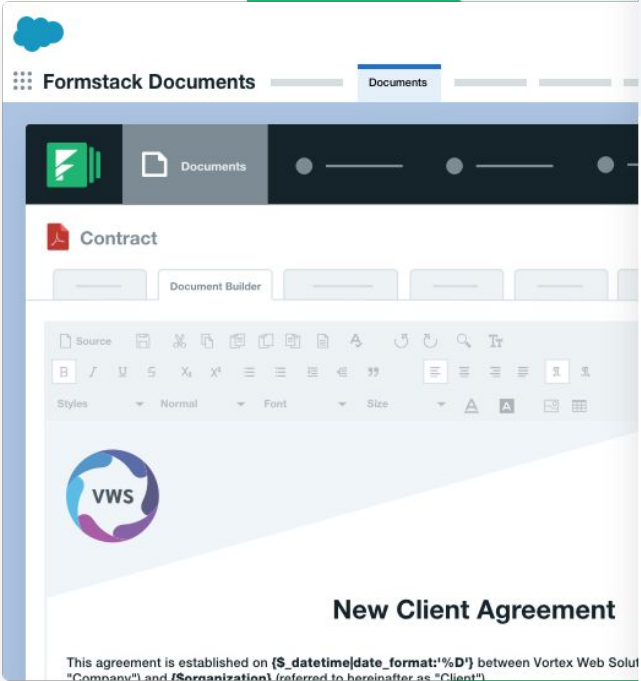
The screenshot displays the Formstack interface for creating a form in Salesforce. The interface is divided into three main sections: a sidebar on the left, a top bar, and a main form area.

- Sidebar:** Contains a list of form fields that can be dragged into the form. The fields listed are: Buyer Info, Buyer (Account), Seller Info, Seller First, Seller Last, Property, Address\*, City\*, and State\*.
- Top Bar:** Features the Formstack logo, a 'Draft Saved' status indicator, a 'Publish Draft' button, and a 'Form Settings' dropdown menu.
- Main Form Area:** Displays the form being built, titled 'Agreement of Purchase & Sale Form'. The form includes several sections:
  - Buyer (Account) Lookup:** A search bar with a magnifying glass icon.
  - Seller:** A text input field.
  - Address:** A text input field.



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The screenshot displays the Formstack Sign web application interface. At the top, there's a header with the Formstack logo and the text "OPPORTUNITY Optix Health". Below this, a form titled "HIPAA Medical Release Form" is shown. The form includes a "MEDICAL DISCLAIMER" section with the following text: "MEDICAL DISCLAIMER: I understand that the medical record released pursuant to this authorization could contain information concerning drug related conditions, alcoholism, psychological conditions, psychiatric conditions, and/or blood borne infectious disease, which are subject to federal and/or state restrictions on disclosure. I understand that if the person or entity that receives the information is not a health care provider or health plan covered by federal privacy regulations, the information described above may be re-disclosed and no longer protected by these regulations. I hereby affirm that I have read and fully understand the above statements and consent to the disclosure of the medical record for the purpose and extent stated above." Below the disclaimer, there are two rows of signature fields. Each row has a "Click to Sign" button and an "Add Date" button. The first row is labeled "Patient Signature" and the second row is labeled "Witness Signature". The interface also shows a sidebar with "Activity" and "Chatter" tabs, and a top navigation bar with "Follow", "Edit", "Delete", and "Clone" buttons.



## HOW FORMSTACK HELPED

**Salesforce manages global building operations across 150 locations with their real estate teams.**

- 1 Condensed 80 forms into one single form process
- 2 Established an end-to-end workflow across all systems
- 3 Connected 150 locations to a single process and saved hours of time by eliminating multiple forms.



**We evaluated build vs buy and scored vendors based on five key categories. Formstack was chosen as it was built on Force.com and would maximize our return on the build out of our Real Estate and Workplace Services Salesforce org.**



**Fawn Perazzo**

Senior Manager, Real Estate  
Technology  
Salesforce



# Pricing



[Formstack Documents](#)



[Formstack Forms for Salesforce](#)



[Formstack Sign](#)





# Documents Plans and Pricing

View pricing and packages below to select your plan.

		<b>MOST POPULAR</b>		
	<b>Starter</b>	<b>Teams</b>	<b>Pro</b>	<b>Enterprise</b>
	Basic document creation	Advanced features	Larger teams	Customized for you
	<b>\$92</b> /month	<b>\$184</b> /month	<b>\$367</b> /month	
	Billed annually	Billed annually	Billed annually	
	<b>Try It Free</b>	<b>Try It Free</b>	<b>Try It Free</b>	<b>Contact Us</b>
<b>Billed Monthly</b> <input type="radio"/> <b>Billed Annually</b> <input checked="" type="radio"/>				
Merges per Month ⓘ	150	500	2000	2000+
Users ⓘ	2	5	15	15+
Templates ⓘ	10	20	50	50+
Two-Factor Authentication (2FA) ⓘ	✓	✓	✓	✓
Data Routing ⓘ	✓	✓	✓	✓
Third-Party Deliveries ⓘ	✓	✓	✓	✓
Master Services Agreement (MSA) ⓘ				✓
HIPAA Compliance ⓘ				✓

Users are template editors only\*

Anyone in your Salesforce org can generate documents those individuals are not consider Formstack users\*

[What is a merge?](#) - a unique delivery for your documents such as Salesforce, Formstack Sign, or Email

