

Nintex® Document Generation for Office 365™



Automate the creation and delivery of business documents

With the **Nintex Document Generation** action, you can build Nintex workflows that automatically create and deliver richly formatted Word, Excel, and PowerPoint documents in Office 365, with data integrated from SharePoint.



MANAGE

document templates, versioning, approvals and tagging – all within Office 365



GENERATE

documents using templates and existing data, or merge data from SharePoint



DELIVER

final documents to people outside the organization for eSignature, document management and storage



IMPROVE

the efficiency and quality of employee, customer and vendor communications

Action features that enhance workflows

POWERFUL, YET EASY TEMPLATE DESIGN

If you know Microsoft Word, Excel, PowerPoint or a PDF creation tool, you can create any document templates featuring dynamic tables, images, custom fonts, and multiple languages and currencies.

SEAMLESS DATA ACCESS

Access data stored in external/non-Office 365 data sources and apply them to your document template, dynamically at run-time.

MULTI-CHANNEL DELIVERY

Send/distribute documents via multiple methods using configurable options within workflows you've built using Nintex for Office 365.

ON-DEMAND SCHEDULING

Automate the distribution of hundreds or even thousands of documents at a particular time or on a specific day.

BUILT FOR OFFICE 365

Use your own data to auto-generate documents that leverage document templates while you work in Office 365.

Documents you can automate



Sales

Quotes, proposals, contracts, account plans



Legal & Procurement

non-disclosure agreements, terms and conditions, contracts



Field Service

Work order summaries, repair orders, warranty, service technician efficiency reports



Management

Business reviews, pipeline reviews, forecasts



Support

Renewals, response letters, case history logging