



TITAN Document Studio

Salesforce First Doc Gen, eSign & CLM

Product Overview

TITAN Document Studio is a Salesforce First solution for dynamic document generation, eSignature management, and contract lifecycle automation.

From proposals and contracts to signed agreements, Titan streamlines the entire process directly within your CRM. Eliminate the need for separate databases and complex integrations by keeping every document, signature, and contract securely inside Salesforce.

The Problem

Sales, Finance, and Operations teams face recurring issues inside Salesforce:

Inefficient Document Processes

- Manual creation and assembly of proposals, quotes, and contracts
- Untraceable redlining and versioning
- Outside Salesforce (e.g., "msd_finalv3.docx")
- Inconsistent branding and frequent errors
- Lack of Salesforce-driven automation for custom CLM processes

Disconnected eSignatures

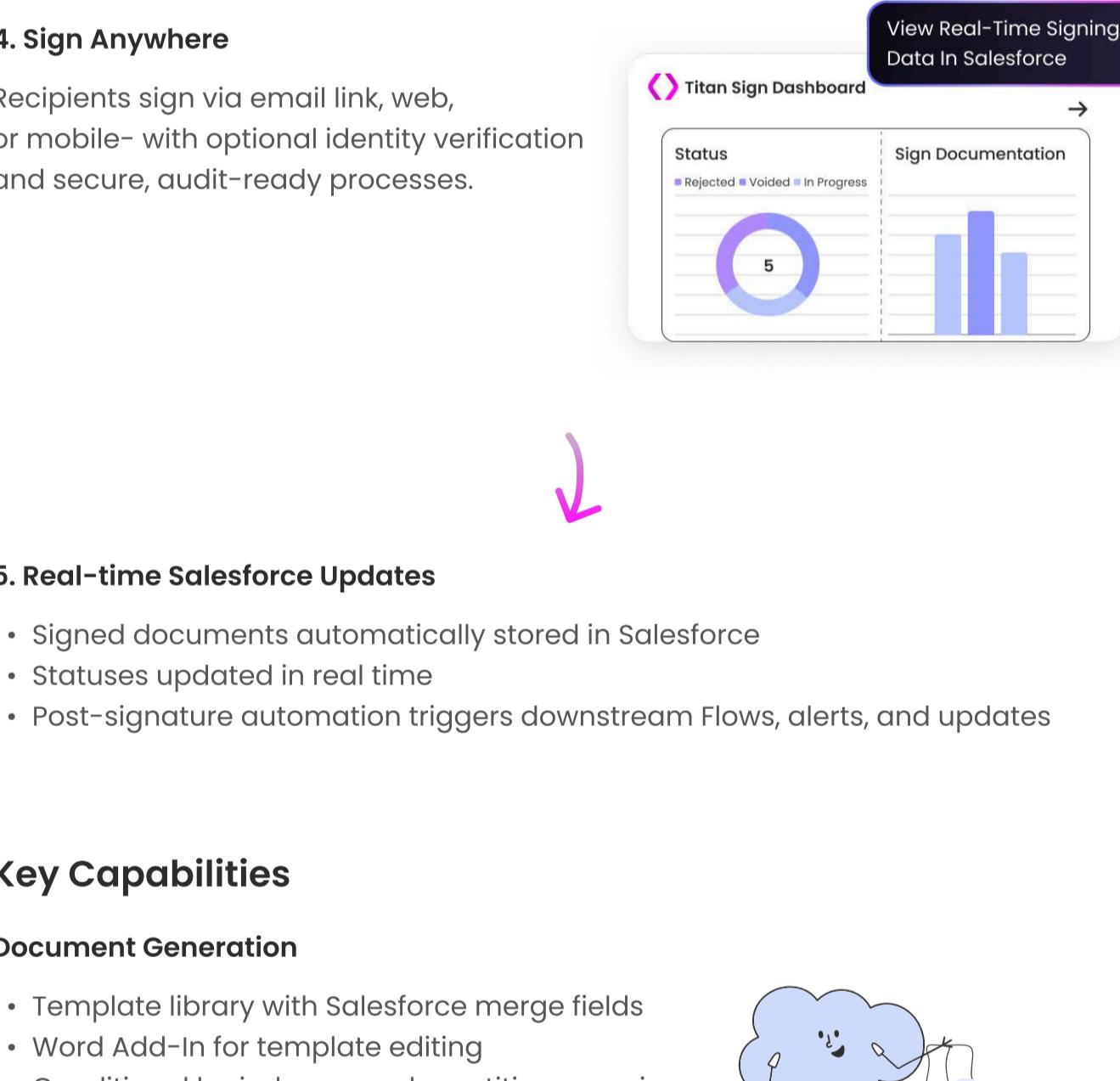
- Third-party signing tools that sit outside Salesforce
- Manual updates, inefficient workflows, and compliance risks
- Slow turnaround due to context switching
- Fragmented tracking



Competitor tools weren't built to be Salesforce-centric, resulting in operational dysfunction.

Titan's All-in-One Document Solution

TITAN Document Studio turns document workflows into a single, seamless experience inside Salesforce. With Titan, you can generate perfect, templated documents and send them for signature all within your CRM. Sync, track, automate, and store everything in real time, all without writing a line of code. Build dynamic Microsoft Word templates powered by your Salesforce data and use If/then rules to adapt each document in real time, ensuring clients only see what they need.



How It Works

1. Template & Generate

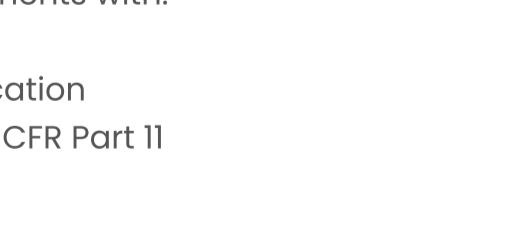
- Create reusable templates for quotes, contracts, proposals, statements of work, and more
- Pull Salesforce data into documents automatically
- Choose Word, PDF, or any supported format

Titan's Word Add-In lets business users build and edit templates in Microsoft Word with Salesforce fields embedded, no developers required.



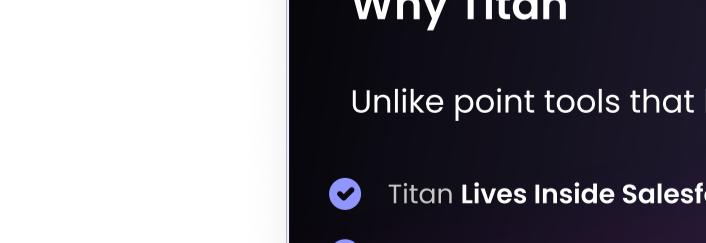
2. Review & Issue

- Preview generated documents inside Salesforce
- Apply conditional logic, fields, and formatting automatically
- Deliver to stakeholders or customers with one click



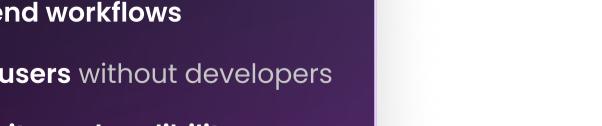
3. Send for Signature

- Launch eSignatures directly from the generated document
- Support internal and external signers
- Sequential or parallel signing as needed



4. Sign Anywhere

Recipients sign via email link, web, or mobile—with optional identity verification and secure, audit-ready processes.



1,000+ organizations Enterprise-Approved AppExchange-Loved ★★★★★ (4.39/5)

Titan Document Studio combines document generation, eSignatures, and contract lifecycle management into a single, seamless Salesforce experience for all your document needs.

Key Capabilities

Document Generation

- Template library with Salesforce merge fields
- Word Add-In for template editing
- Conditional logic, loops, and repetitive grouping
- Output to Word and PDF
- Data-driven automation



Native By Design

- All data lives in Salesforce
- No integration glue, no sync apps
- Built for clicks, not code

Security & Compliance

TITAN supports enterprise and regulated environments with:

- Full audit trails
- Identity verification and multi-factor authentication
- Compliance with HIPAA, GDPR, eIDAS, 21 CFR Part 11

Popular Use Cases

- Commercial proposals and contracts
- Statements of work with dynamic pricing
- Legal agreements and compliance sign-offs
- HR onboarding documentation
- Approval and signature automation for Ops, Legal, and Finance

eSignatures

- Electronic & digital signature support
- One-Click Sign workflows
- Parallel and sequential signer paths
- Real-time status tracking
- Mobile-optimized signing

Real-time Salesforce Updates

- Signed documents automatically stored in Salesforce
- Statuses updated in real time
- Post-signature automation triggers downstream Flows, alerts, and updates

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