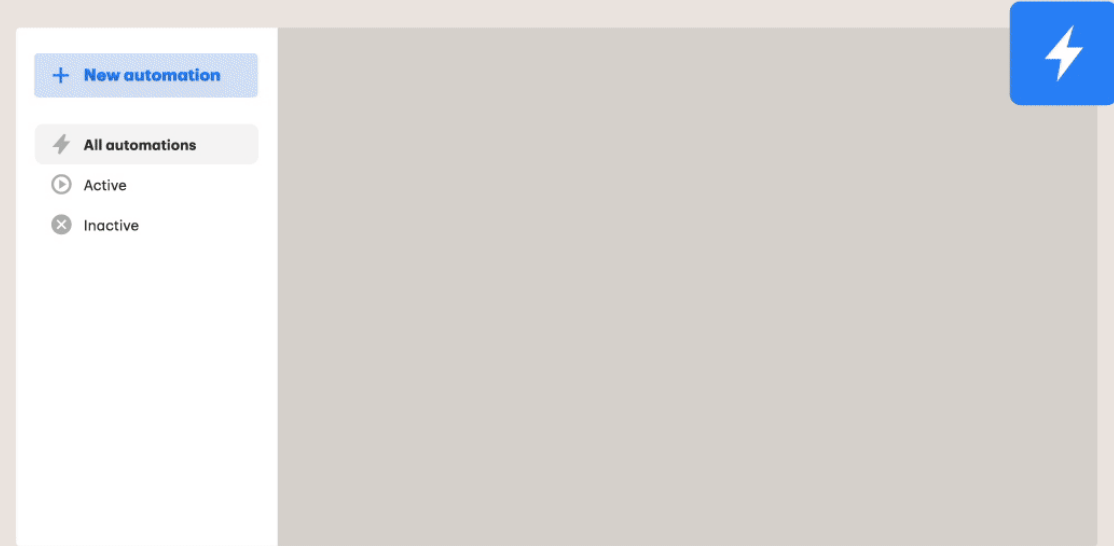


# Automate tasks in PandaDoc

After a document is sent or completed, connect with other tools, send follow-ups and organize documents easily. All within one tab.



## Cut document processing costs

We handle tasks in the background to save you time and money, so you can focus on projects that are business critical.



## Set up with simplicity

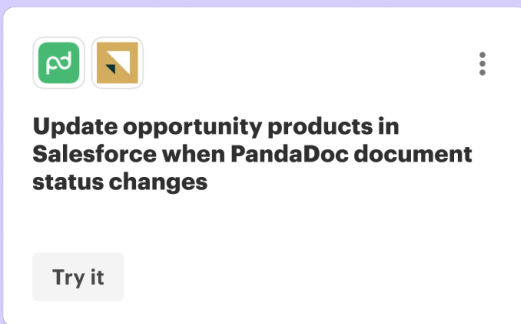
Personalize our intuitive, uncomplicated recipes, so you can fully control what happens after your documents are done.



## Forget the extras

No need for expensive and complicated tools that are hard to figure out and tend to break often.

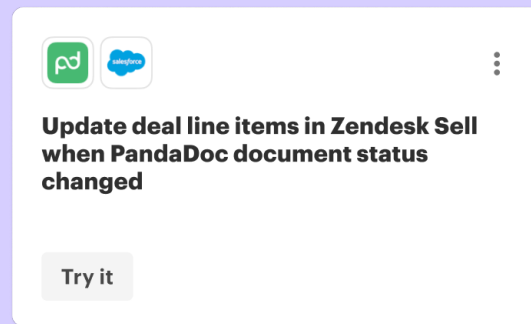
# Offload manual tasks and focus on important work



Update opportunity products in Salesforce when PandaDoc document status changes

Try it

This card features the PandaDoc logo and the Salesforce logo. It includes a three-dot menu icon in the top right corner.



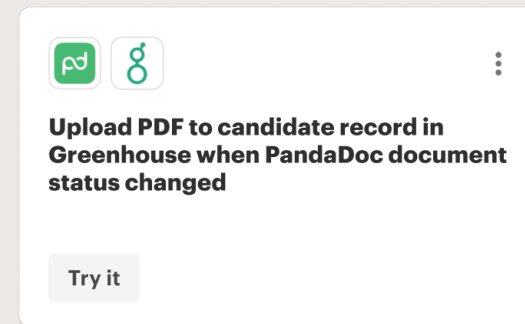
Update deal line items in Zendesk Sell when PandaDoc document status changed

Try it

This card features the PandaDoc logo and the Zendesk logo. It includes a three-dot menu icon in the top right corner.

## Automate with CRMs

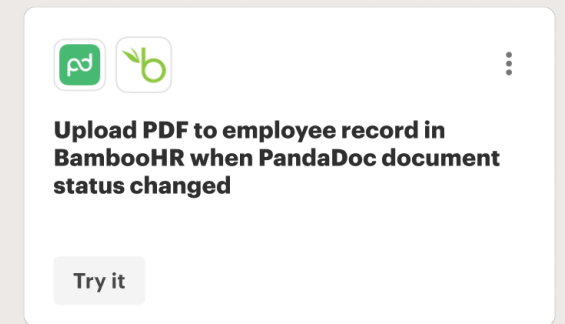
- Auto attach PDF documents without difficulty to your deals or opportunities
- Maintain CRM hygiene by changing status or stages automatically
- Automatically update fillable fields when a document status is updated



Upload PDF to candidate record in Greenhouse when PandaDoc document status changed

Try it

This card features the PandaDoc logo and the Greenhouse logo. It includes a three-dot menu icon in the top right corner.



Upload PDF to employee record in BambooHR when PandaDoc document status changed

Try it

This card features the PandaDoc logo and the BambooHR logo. It includes a three-dot menu icon in the top right corner.

## Automate with HR and other tools

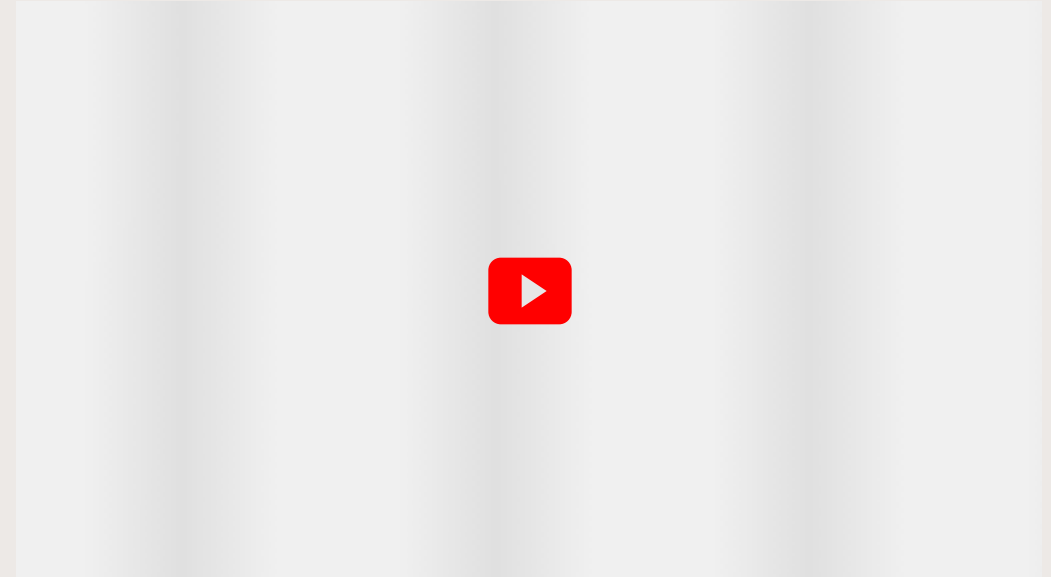
- Stay organized on your employee or candidate experience by uploading PDF documents or changing offer status automatically in your ATS or HRIS
- Keep your document repository updated by uploading a PDF to cloud storage whenever a document's status is updated
- Keep your ERP updated by uploading PDF documents to vendor or opportunity or purchase order

# Using Zapier?

Check out how PandaDoc automations give you an edge.

	Automations in PandaDoc	Zapier
User-friendly	✓	✗
Reliable	✓	✗
Price	\$	\$ \$ \$

# Discover how easy it is to use Automations



## See what automations can do for your business

[www.pandadoc.com](http://www.pandadoc.com)

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Learn more about all the recipes available [here](#).