PandaDoc®

Content becomes smarter with PandaDoc

Generate documents from a custom template, work with rules to dynamically populate items into them based on country, industry CRM data, or any other variable.

Save time with logic

Spend less time choosing a template or the right content library item, with rules that pull info directly from your CRM and automatically update your content. Documents practically assemble themselves.

Customize consistently

Make documents specific to your business relationships without letting key details slip through the cracks. Build accurate, content-rich and compliant documents quickly.

Deliver flawless documents every time

Ensure that the right info is added easily to each document without spending time searching for content. Deliver error-free docs in a single template that can accommodate different content for different recipients.

Software Services Proposal for [Client.Compa

Content auto–populates here

Create a conditional rule

This variable will activate conditions below

Client.Country

Condition 1

IF   Variable value is

THEN   Show these content library items   +

+ Add another condition

Cancel   **Save rule**

Ensure the right info is always added

Create personalized docs with recipient data

Provide terms or clauses for contracts or documents that require specific language based on recipient location, job title, or product SKU. This will reduce errors and ensure each doc is tailored to their unique needs.
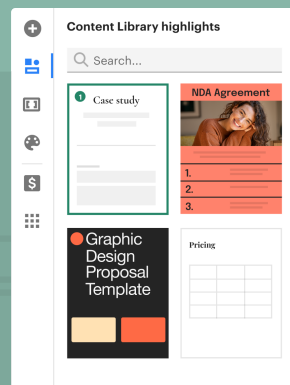
Show Case Studies that make an impact

Smart Content enables your clients to see specific Case Studies from their vertical, so they'll know that industry peers are in your corner.

Benefits

Reduce errors significantly as content always matches based on important variables

Improve speed to create: no need to look for the right piece of content to attach in your contract or proposal

Share documents quicker as information automatically populates from your CRM, as well as other systems or variables

See higher response rates and engagement as your content is customized per each recipient

Maintain consistency in look, feel and structure - even when you customize

Pre-select and customize templates for each recipient.

Find out why our customers count on PandaDoc

"I used to have writing proposals and procrastinate until the 9th hour but now that I have PandaDoc, I really do create my proposals in minimal time."

Agency in the internet

"PandaDoc is great for building dynamic proposal templates and pitch decks. New documents can be created directly from these templates, making customization easy and efficient."

Eric Pratt,
Managing Partner at Revenue River

"By using PandaDoc, we took a very manual, labor-intensive process and automated 95% of the proposal creation process that we go through."

Geoff Yeagley,
VP of Marketing at Compass IT Compliance

See how powerful Smart Content can be

PandaDoc will help you create and manage templates with dynamic and reusable content.