



# Real-life Use Cases: Document Automation for Manufacturers

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# 1 Introduction

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In 2026, we see our manufacturing customers' frontline operations driven by faster and personalized customer engagement, data-driven strategies, and productivity programs.

These trends come as an answer to serious challenges with global proportions:

- ever-growing competition — driven especially by Asia
- high costs, for energy in particular — often twice as high as pre-COVID
- severe trade disruptions aggravated by rising tariffs.

The current market challenges have inflicted vital development projects for manufacturers' Salesforce platforms — some of the most complex in the world.

Salesforce-embedded document and workflow automation is one key technology that helps achieve the goals of these projects.

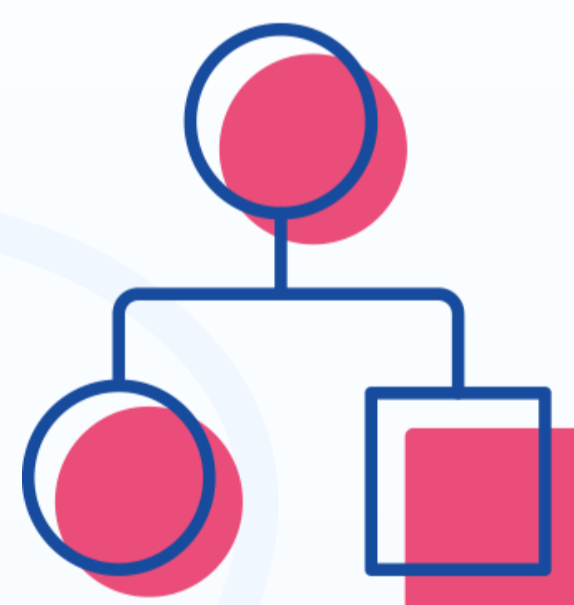
Let's look at some manufacturing key trends in more detail — and see, what makes Documill's real-life solutions vital in adapting to them.

## 2 Key manufacturing trends in 2026

From Documill's perspective, certain high-level initiatives shape our business environment. Here are the ones that continuously come to the forefront in our projects with our customers and partners, as well as discussions with industry experts.

- **Shift to B2C and Personalization:** Manufacturers increasingly bypass intermediaries to directly sell to and support consumers.
- **Product customization and localization:** Shift to more personalized, market-specific products.
- **Data-Driven and AI-Powered Sales:** Sales teams depend on CRM data, its quality, and AI for targeted selling.
- **Investment in Efficiency tech and Growth:** Manufacturers invest in efficiency tech to boost revenue and stay competitive.
- **Workforce Evolution:** Jobs shift toward technology-driven, higher-skill positions, requiring more training and onboarding efforts.
- **Value-Added Services and Ecosystems:** Expansion into services like 3D printing, additional software, and advanced maintenance.

We'll explain below how and where document automation helps manufacturers reach these goals — with real use cases across Salesforce clouds.



88%

of customers say a seamless experience matters as much as the product

## 2.1 Shift to B2C and Personalization

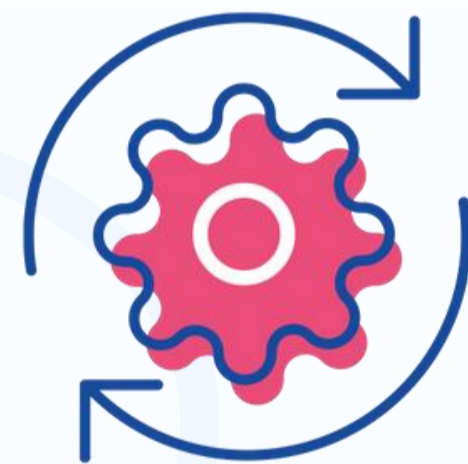
Manufacturers are increasingly bypassing traditional intermediaries like retailers to sell directly to consumers (B2C).

Multi-channel strategies are paramount in direct marketing and sales today. Consumers need the chance to jump from social media to an online shop, or from a mobile ad to a bricks-and-mortar pop-up. Often, they will later look for support from a service center/portal.

The most important steps in these transactions need to be documented. CRM-embedded document automation solutions like Documill enable:

- establishing a centralized Salesforce organization for all markets
- delivering documents via portals, email, mobile, or integrated platforms
- support for different locales and languages.

*“88% of customers say a seamless experience matters as much as the product.”*  
— *Salesforce, 2023*



Up to  
**40%**  
reduction in admin  
workload

## 2.2 Product customization and localization

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More personalized products and services — manufacturers are looking to strengthen their customer experience, business, and brand through these, aided by...

## 2.3 Data-Driven and AI-Powered Sales

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...Data-driven and AI-powered sales. They enable such personalization and better understanding of customer behaviors, preferences, and needs — all prerequisites of individualized offerings.

We see this approach as a main driver behind manufacturers' drive towards B2C strategies — and a generator of growth in customer data held in their Salesforce platforms.

In these areas, Documill enables:

- high data quality and consistency through processes embedded in Salesforce
- firm basis for unbroken AI with robust workflows
- document automation that supports versatile product configurations and portfolios.



**80%**

**faster contract cycle time  
with automated approvals**

## 2.4 Efficiency and Investment in Growth

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Despite economic pressures, we see manufacturers prioritizing investment in efficiency-focused technologies, to drive revenue and win in the competition.

As customer relations become more data-rich, workloads of frontline workers like sales reps and customer service agents grow...

## 2.5 Workforce Evolution

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There's a need for workforce evolution, as roles are shifting toward technology-driven, high-wage positions. They require more time for training and onboarding — all while competition and cost issues are squeezing margins.

Document and workflow automation help adapt to these two trends with:

- significant time savings enabling efficiency
- elimination of costly errors with even the most complex data structures
- space for workers' professional growth.



## 2.6 Value-Added Services and Ecosystems

Manufacturers are moving beyond selling products to increase revenue. They look to offer, for example, 3D printing, custom engineering, and advanced maintenance services and software.

In practice, these tendencies widen the product portfolio, bringing added complexity. Here, a solution like Documill helps manage the ramifications with:

- Tight integration with data sources like Service Cloud and CPQ
- Automated support for personalized product and service configurations
- 360° view of all customer touchpoints and services.

*"81% of OEMs expect significant returns from data monetisation within the next five years."*  
— Deloitte, 2024



# 2.7

times higher cost of non-compliance vs. investment in compliant systems

## 3.1 Use Cases: Marketing & Sales

Over the years, we have innovated a wide range of solutions for and with our customers. They span the entire transaction cycle from pre-purchase to after-sales services — in Salesforce domains from CPQ and Sales to Experience and Service clouds.

**Product catalogs:** For example, we implemented this kind of a solution for a European manufacturer, who operates in plus-90 markets globally, carrying a catalog of more than 36,000 products — with an attractive, flawless layout.

**Forms:** Documill's integrated data collection forms are a powerful tool that makes it easy for customers to submit data in Salesforce.

**Sales quotes & proposals:** Whether it's a simple B2C quote & contract process or a complex B2B agreement with extensive CPQ data, Documill handles the process without hiccups.

**Automated & negotiated contracts:** Documill's document generation and workflow automation solution also includes features like clause libraries, embedded e-signing — and advanced online collaboration, also externally.

*AI fails without streamlined processes  
– World Economic Forum, 2025*



Up to  
**9%**  
of annual revenue lost to  
inefficient contracting

## 3.2 Use Cases: Deliveries

**Invoices:** For those manufacturers who want to operate completely on Salesforce, Documill can offer a solution to generate invoices with a click of a button.

**Order confirmations, picking lists, and waybills for on-site product sales (mobile):** Our customer's salespeople visit clients every day to deliver material to construction sites. Documill automates the documents in their all-mobile sales process.

**Shipping documents and packing lists:** A media company prints ads and magazines, and sends those directly to customers, complete with Documill-generated order confirmations and pallet labels.

**Delivery notes:** For delivery notes closely related to sales, the combination of Documill and Salesforce works best — for instance, for equipment delivered for testing to a prospect – or as a demo for a trade show.

*"The constant app-switching kills productivity and creates data silos."*

*— Salesforce Ben, 2026*



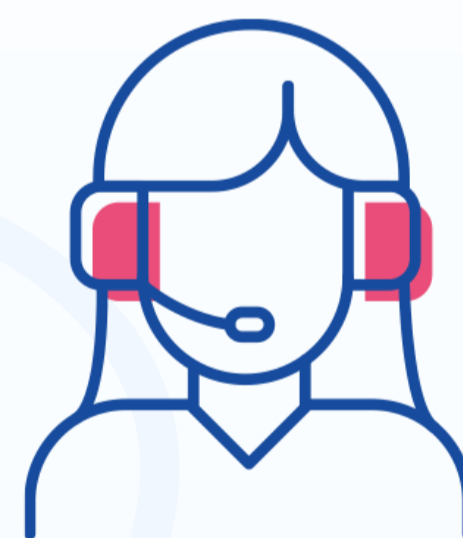
### 3.3 Use Cases: Incidents & Field Services

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**Incident Reports:** Some of Documill's larger manufacturing customers rely on our solutions to create brief slides for reporting a safety or quality issue, triggering corrective measures.

**Customer complaint responses:** As a prime-time example, one of Documill's car manufacturing customers has enabled their agents to use an interactive template for case responses. Their customer support agents can quickly produce, or even better, reuse customer correspondence.

**Field service reports and certificates:** Documill complements an on-site inspection reporting service with the production of the related documents.



*“AI and automation tools are saving sales professionals an estimated 2 hours and 15 minutes daily by automating tasks such as data entry and scheduling.” — HubSpot, 2024*

## 4. Final words

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As you can see, our solution portfolio is wide, with new innovations being added as you are reading this.

These qualities that keep pulling us ahead in the manufacturing space:

- **Top user experience:** No need for user training. Just Seamless connection with Manufacturing, Sales, Service, and Experience Clouds to provide a unified user experience.
- **Adaptivity to manufacturers' specific needs:** As the product portfolios grow more personalized and varied, Documill can handle the complexity.
- **Multi-channel, multi-language delivery:** Use a centralized system across channels, markets, languages and locales.
- **E-signature capabilities included:** No need for third-party tools.
- **ISO27001 and industry-compliant:** Built to meet the highest standards of data security and regulatory compliance.
- **Five-star solution and customer service:** 4.96/5 average in Salesforce AppExchange.

Would you like to enhance your Salesforce with us?

[Contact us.](#)



*“If you’re looking for a reliable, user-friendly, and powerful document automation solution for Salesforce, Documill is a fantastic choice!” - Melinda Mild, Salesforce Consultant, Redpill Linpro AB*