

Document Automation Software Category

FALL 2025
Customer Success Report





Document Automation Software Category

Document automation is a procedure to automatically generate digital documents. It utilizes logic to create new documents based on existing data. This information could be a paragraph of text (such as a legal disclaimer) or facts from a database (like an individual's name and contact details). Document automation software makes it fast and easy to create complex documents, sales proposals, legal letters, and certain kinds of marketing collateral.

A big advantage of document automation software is you can swiftly update multiple files. You don't need to individually analyze each document but can update all your files at once. When you import external information and update your smart fields, the solution will dynamically update each document to display the new information. This minimizes the risk of human error and gives all team members the collateral they need fast – thereby creating a win-win scenario.

Customer Success Report

Ranking Methodology

The FeaturedCustomers Customer Success ranking is based on data from our customer reference platform, market presence, web presence, & social presence as well as additional data aggregated from online sources and media properties. Our ranking engine applies an algorithm to all data collected to calculate the final Customer Success Report rankings.

The overall Customer Success ranking is a weighted average based on 3 parts:



CONTENT SCORE

- ✓ Total # of vendor generated customer references (case studies, success stories, testimonials, and customer videos)
- ✓ Customer reference rating score
- ✓ Year-over-year change in amount of customer references on FeaturedCustomers platform
- ✓ Total # of profile views on FeaturedCustomers platform
- ✓ Total # of customer reference views on FeaturedCustomers platform



MARKET PRESENCE SCORE

- ✓ Social media followers including LinkedIn, Twitter, & Facebook
- ✓ Vendor momentum based on web traffic and search trends
- ✓ Organic SEO key term rankings
- ✓ Company presence including # of press mentions



COMPANY SCORE

- ✓ Total # of employees (based on social media and public resources)
- ✓ Year-over-year change in # of employees over past 12 months
- ✓ Glassdoor ranking
- ✓ Venture capital raised

Award Levels



MARKET LEADER

Vendor on FeaturedCustomers.com with substantial customer base & market share. Leaders have the highest ratio of customer success content, content quality score, and social media presence relative to company size.



TOP PERFORMER

Vendor on FeaturedCustomers.com with significant market presence and resources and enough customer reference content to validate their vision. Top Performer's products are highly rated by its customers but have not achieved the customer base and scale of a Market Leader.



RISING STAR

Vendor on FeaturedCustomers.com that does not have the market presence of Market Leaders or Top Performers, but understands where the market is going and has disruptive technology. Rising Stars have been around long enough to establish momentum and a minimum amount of customer reference content along with a growing social presence.

2025 Customer Success Awards

Check out this list of the highest rated Document Automation Software based on the FeaturedCustomers Customer Success Report.



Adobe



DocuWare

ESKER®

experlogix
Document Automation



Intellistack

nintex



PandaDoc®

templafy



ActiveDocs
DOCUMENT AUTOMATION SOFTWARE



ADLIB

airSlate
WorkFlow

ANTWORKS

ARTSYL

foxit

HOTdocs™
MITRATECH

nitro

Ocrolus



square9
softworks



klippa
an @SER company

XAIT®

XpressDox

* Companies listed in alphabetical order



2025
**DOCUMENT
AUTOMATION
SOFTWARE**

MARKET LEADER



ABOUT ADOBE



Adobe is the global leader in digital marketing and digital media solutions. Adobe tools and services allow customers to create groundbreaking digital content, deploy it across media and devices, measure and optimize it over time, and achieve greater business success. Adobe help customers make, manage, measure, and monetize content across every channel and screen.

3263 TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Added visibility with Adobe Document Cloud also means that we have better oversight and control over complex documents. Some of the document files we work with are quite lengthy. We can now easily track workflows to confirm progress and keep information secure.”

THIERRY BELLOEIL
PURCHASING POLICY COORDINATOR, CONTRACTUAL
PERFORMANCE DEPARTMENT, EDF

“The digital workflows delivered with Adobe Document Cloud allow us to provide customers and partners faster and more convenient experiences, with accuracy and security as priority.”

KEE YAW YEE
CHIEF INFORMATION OFFICER OF INFORMATION
SERVICES, STARHUB

“We deal with a tremendous volume of contracts. Using Adobe Sign as part of our electronic document workflow helps us scale and significantly reduce cycle time for getting contracts signed.”

SYLVIA MCCORRISTON
BUSINESS SYSTEMS ANALYST FOR COMMERCIAL LEGAL,
WORKDAY

“One of the things that made Adobe Sign so attractive was how we could use the APIs to integrate it into our custom platform and get up and running quickly.”

ASHLEY CULLISON
PROJECT MANAGER, STAFFING INNOVATION GROUP,
EMPLOYBRIDGE

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ABOUT CONGA



Conga developed its suite of enterprise-grade Intelligent Document Automation solutions to help businesses optimize their CRM investments. The Conga Suite, which includes Conga Composer, Conga Contracts, Conga ActionGrid, and Conga Sign, simplifies and automates data, documents, contracts, signing, and reporting. As a Salesforce Platinum ISV Partner, Conga is committed to providing its customers with enterprise-grade infrastructure, security, and solutions. In fact, more than 650,000 users in 85 countries across all industries rely on Conga applications to fully utilize their Salesforce data, including Hilton Worldwide, Schumacher Group, and...

382

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Conga provides the flexibility of document creation. Low-use or one-off documents can be quickly generated through Conga Composer, while high-use documents can be created automatically based on our own business criteria. Being able to have that flexibility helps to solve those day-to-day problems that we face as we grow significantly to help our customers and our dealers. By speeding up and essentially automating areas of our business, we can continue to provide the best end-to-end experience for our customers.”

JAMES NASH
PRODUCT OWNER, OODLE CAR FINANCE

“Conga has given InZone the flexibility to quickly iterate design and wording of customer documents out of Salesforce. InZone was able to transform various processes and improve its customer experience with quotes and estimates, home energy plans, rental inspection documents, and compliance documentation.”

ROSIE DAVISON
GENERAL MANAGER OF MARKETING, INZONE INDUSTRIES LTD.

“Using Conga, we can design our quote documents accordingly to make sure the information is presented in a way that ideally reflects our products and services—both in terms of relevant data and in terms of perfect layout. Thus, we can ensure that our quotes always reflect the high quality of our products and services.”

MARIO ENGLERT
CHIEF FINANCIAL OFFICER, LAUDA

“Eleven days after purchasing Conga Collaborate, I created a 99-page document with 17 signature blocks in less than 30 minutes. My client was able to review and sign the document in less than five minutes.”

JORDAN EASLEY
DIRECTOR OF OPERATIONS, REALYNC

TRUSTED BY





ABOUT DOCUWARE



DocuWare provides digital document management and automated workflow solutions to organizations of any size and across all major industries from manufacturing and retail to healthcare and government. With cloud and on-premises deployments across 100+ countries, DocuWare serves over 17,000 customers as well as a global network of over 800 partners.

514

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Thanks to our DMS, we are saving a lot of the time normally spent on searching and storing documents. This has meant recapturing a good 85 hours monthly for our organization, which basically means the work of one part-time employee. This means that we were able to reach our aggressive growth goals with our existing resources.”

RALPH FARROW
IT MANAGER, SMITHFIELD FOODS

“DocuWare has given us peace of mind regarding the management and security of our electronic documents, alerts, and reports. Additionally, we are very happy with the integration between DocuWare and our internal systems, which allows us to quickly and easily share documents without duplicating information.”

DANIEL ARZAMENDIA
OPERATIONS AND SYSTEMS MANAGER, BACS BANCO DE
CRÉDITO Y SECURITIZACIÓN S.A.

“The DocuWare Cloud solution offers the kind of flexibility and scalability that works perfectly with our business processes. As opposed to other software applications, this system did not require any cumbersome structural changes in our proven workflows.”

CHRISTIAN ADAM
MANAGING DIRECTOR, ADAM TRANSPORTE

“We love having all our documents in their native formats stored in one location. Peace of mind and ease of retrieval have been the biggest benefits we’ve received from DocuWare.”

JIM CRIST
CHIEF FINANCIAL AND OPERATIONS OFFICER, NATIONAL
CROP INSURANCE SERVICES

TRUSTED BY



F A L K E
GERMANY 1895

HARIBO

brother
at your side





ABOUT ESKER

ESKER®

Esker is the global authority in AI-powered business solutions for the Office of the CFO. Leveraging the latest in automation technologies, Esker's Source-to-Pay and Order-to-Cash solutions optimize working capital and cashflow, enhance decision-making, and drive better collaboration and human-to-human relationships with customers, suppliers and employees. Esker's mission is to build a foundation that promotes positive-sum growth, increased productivity, improved employee engagement, and greater trust between organizations. Esker's cloud platform integrates with existing ERP environments, giving businesses the flexibility to connect with...

691

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Esker is so much faster and efficient than doing things manually. Now, with all of the visibility we have into our process, even having a core team member gone for a month didn't affect us at all.”

TRACEY LE
ACCOUNTS PAYABLE SUPERVISOR, ARMTEC
INFRASTRUCTURE INC.

“Esker gave us everything we needed in terms of cost reduction and better document storage. We now have a single platform helping us control multiple processes.”

JANET KUCK
SENIOR VICE PRESIDENT OF INFORMATION SYSTEMS,
VALDESE WEAVERS

“People were previously spending threequarters of their day doing manual order entry tasks, and now, Esker simply grabs the document automatically, reads it, and we have the team validate them.”

STEPHEN MEYER
BPA SPECIALIST, CORBUS

“The automation has improved our processes by streamlining them. Now we're able to identify the trend and the lifecycle of an invoice.”

CASSIE CAMBRIDGE
DIRECTOR OF ACCOUNTS PAYABLE, SRS DISTRIBUTION

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ABOUT EXPERLOGIX DOCUMENT AUTOMATION



Experlogix document automation simplifies and optimizes even the most complex document processes for companies worldwide. We transform frustration, redundancy, and friction into clarity, velocity, and accuracy with interactive document generation, automated flows, and robust, user-friendly features on a single, intuitive platform. Experlogix Document Automation — simplifying the complex.

52

TOTAL CUSTOMER REFERENCES

[VIEW ALL
REFERENCES](#)

FEATURED TESTIMONIALS

“Your imagination is really the limit in terms of the reports you can create with [Experlogix Document Automation]. A great database that provides structure for personalized reporting along with Microsoft Word that allows companies to tailor the documents with a familiar and reliable tool is a powerful combination. All organizations need to do is define their workflow and implement the [Experlogix Document Automation] solution.”

DYLAN NAVRA
MANAGING DIRECTOR, PRAEMIUM

“With [Experlogix Document Automation] for Microsoft Dynamics 365, our documents are created, managed and stored centrally, which gives us far more control over the consistency of all our documents. This is key to providing the best service to our customers.”

MARK HAMMOND
BUSINESS TRANSFORMATION PROGRAMME MANAGER,
L&Q

“[Experlogix Document Automation] allows us to take a template and input data dynamically from the configuration. Then the system generates the output in a very user-friendly way. We can bring in additional collateral such as brochures, videos, photos, CAD diagrams, specifications and so forth.”

KEN KELLY
PRESIDENT, KELLY ROOFING

“Experlogix Document Automation allowed us to reduce the time to generate critical documents. What formerly took us 45-60 minutes per document now takes only 10 minutes. This saves us hours every day.”

MAHDY GHANE
BUSINESS ANALYST, RIDE DESIGNS

TRUSTED BY













ABOUT INTELLISTACK



Intellistack (formerly Formstack) has grown into a leading provider of powerful, no-code productivity solutions that help teams do more with less. Across thousands of organizations worldwide, their tools and platform empower users to quickly build custom forms, automate document generation, capture eSignatures, and streamline data-driven processes—all without needing to write a single line of code.

345

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Formstack really works for us when it comes to collecting necessary documentation during the recruitment stage. It allows candidates to easily send us the information we need and for us to keep that information well organized.”

MARK WILSON
DIRECTOR OF RECRUITMENT AND HR, USA SPORT GROUP

“Thanks to Formstack, we’ve been able to eliminate a lot of steps from each campaign. Now we have the ability to not just track cost per click or cost per conversion but truly how much it costs on the campaign level to bring people to class.”

CHRIS LYNETT
CHIEF MARKETING OFFICER, LASSELL UNIVERSITY

“Formstack’s customer support is super responsive, but I can’t say enough about the tool’s ease-of-use. I was actually able to utilize some CSS, and the documentation for that was so easy to follow and readily available.”

LAURA KAISER
SALESFORCE CONSULTANT, PENROD

“Time is money. Formstack took this process from one hour to just seconds. Processing is so much faster, meaning we can go from thousands of loans a month to doing that many in a day.”

CLIFF JOSEPH
OWNER, BRAND INTERACTIVE COMMUNICATIONS

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ABOUT NINTEX

nintex

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes.

703

TOTAL CUSTOMER REFERENCES

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REFERENCES**

FEATURED TESTIMONIALS

“A major advantage of Promapp has been having the processes and documents aligned at the various stages of each employee relations situation. For example, if a letter is required, the restaurant manager can clearly see which letter is aligned with the relevant process, making their life easier and avoiding confusion.”

JOSEPHINE KNOWLES
HR CONSULTANT, MCDONALD'S NEW ZEALAND

“It was so easy to get up and going with Nintex DocGen. Within the first week, we had five document packages live and available to the Sales team. Support was also fantastic, and it quickly became clear that there were opportunities to streamline other sales and service documents.”

DAVID FIDLER
DIRECTOR OF OPERATIONS, CARTELLIGENT

“Nintex Promapp was the tool we used to ensure our processes were up-to-date, compliant and fully available for auditors to review for accreditation. All they had to do was open Nintex Promapp online which made this whole part of the accreditation easy and seamless.”

WILLIAM HUGHES
NATIONAL TELECARE AND HOME HEALTH MANAGER, ST JOHN

“We are in the oil and gas industry and there are lots of documents for operations. We call them control documents. We have a document controller here and she used to manage things manually.”

PHAM NGUYEN CUONG
INFORMATION MANAGEMENT COORDINATOR, PREMIER OIL

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ABOUT PANDADOC



PandaDoc®

PandaDoc is an all-in-one software that streamlines your sales workflows. Create, send, track, and eSign client-facing documents designed to win more business. PandaDoc integrates with your CRM, saves your team time, and provides transparency into your sales performance. PandaDoc empowers businesses and individuals to lead paperless, productive work lives. Pandadoc helps you build beautiful, effective, and modern documents so that you can keep your clients (and yourself) happy.

327

TOTAL CUSTOMER REFERENCES

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REFERENCES**

FEATURED TESTIMONIALS

“The biggest perk of PandaDoc is the beautiful documents it creates. It really makes our company look professional. We have also seen a 25% increase in our closing rate. By implementing PandaDoc, it has cut the time it takes to create a proposal by more than half!”

NIKKI BISEL
OWNER & FOUNDER, SEAFOAM MEDIA

“PandaDoc has helped RadialSpark increase their close rate by 20%. Documents that once took days to create are now created and sent in less than an hour, resulting in a faster sales process, driving down the average days to close across the sales organization.”

MICHAEL ROCKFORD
CO-FOUNDER, AND CEO, RADIALSPARK

“I used to bug students and clients constantly to print, sign and send back documents. With PandaDoc, I have saved a LOT of time. My docs are all signed easily and sent back on time AND they're already digitized which I LOVE.”

SARIAH MASTERSON
PROGRAM DIRECTOR, CODING CAMPUS

“PandaDoc is easy to use and has a simple sending process. It is nice to have so many documents in one easily accessible place.”

RACHEL COOK
HUMAN RESOURCES ADMINISTRATOR, BLUE RAVEN SOLAR

TRUSTED BY





ABOUT TEMPLAFY



Templafy is a fast-growing B2B Software-as-a-Service company, helping over 3.5 million users. Templafy automates documents to remove risk, increase efficiency, and enable better document creation at any complexity and scale for over 800 organizations globally. From immediate access to on-brand, compliant company templates directly within Microsoft 365, to the automated compilation of sales proposals in Salesforce harnessing the power of Managed AI, our platform enables employees to create business documents faster so they can focus on the work that matters...

109

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“The greatest overall benefit of using Templafy has definitely been the improved quality of our documents, both visually and content-wise. The other major benefit has been how much time we have saved, not only me, but every employee. Being able to easily and quickly create documents and presentations means employees can concentrate on other, maybe more important, tasks. And time is money, right.”

ANNA ANDERSSON-SOLJA
MARKETING PROJECT MANAGER, IF P&C INSURANCE

“With Templafy, it has become easy for Ramboll employees to directly import relevant company content into Word documents, such as reports and tenders. Furthermore, the slide library we have developed has been a huge time saver and very well received by employees. Now they are enabled to quickly create professional, on-brand slides, presentations and documents.”

ROOS NEDERVEEN
SENIOR CONSULTANT, CORPORATE BRANDING,
RAMBØLL

“We have better control over documents and presentations being sent off in terms of how it looks and brand compliance. We also have more control over what branding assets are available to S-RM employees and making sure they're applied correctly across our templates.”

MARLIE FREITAS DOS SANTOS
DESIGNER, S-RM

“Our administration support on templates, documents and presentations is now easier – with Templafy, we can quickly check and correct content, and then instantly make everything available to our users.”

PIA HVID TØNNESEN
DIGITAL PROJECT MANAGER, AARHUS UNIVERSITY

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2025
DOCUMENT
AUTOMATION
SOFTWARE

TOP PERFORMER



ABOUT ACTIVEDOCS

ActiveDocs

DOCUMENT AUTOMATION SOFTWARE

ActiveDocs is a document automation specialist. They work with you to give you total confidence in your high-value documents – with over 25 years of experience, they know what works where, and they will share their expertise with you. Their software is chosen by the world's top organizations. It's intuitive and lets you design templates for your documents, configure how and when documents are produced, and what happens to them after. Together, they can come up with a future-proof solution and deploy it thoughtfully to get it right the first time.

116

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Integrating CRM for customer information, MS Project for project data, and ActiveDocs Opus for document generation enhances efficiency and accuracy for Dimension Data and releases valuable consultant time for higher value tasks.”

DIMENSION DATA

“ActiveDocs Opus enables our client to comply with the CRTC code of conduct for customer communication, making it simple to stay up to date with the most recent guidelines.”

LEADING CABLE TV AND NETWORK PROVIDING COMPANY

“ActiveDocs Designer allows business teams to design, build, and manage templates without tying up valuable IT resources.”

PROJECT LEAD
TECHNICALLY ADVANCED AND INNOVATIVE BANK

“ActiveDocs Opus supports efficient, responsive document generation processes and template maintenance at QBCC.”

QUEENSLAND BUILDING AND CONSTRUCTION COMMISSION

TRUSTED BY





ABOUT ADLIB SOFTWARE



ADLIB

Adlib Software has been transforming the way enterprise organizations overcome unstructured data challenges for over 15 years. Integrating with various business applications, Adlib enables digital preparation of documents for improved migration, compliance, privacy and security, digital transformation, capture, and classification. Their document enrichment solutions allow over 5,500 customers globally to elevate their content and derive the insight that is needed to support critical decision-making and secure a competitive advantage.

176

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Adlib Software has made documents come alive for us. As an enterprise-grade data enrichment platform, Adlib not only handles OCRs for documents, but intelligently pulls data from several documents and ties them together.”

KEITH PARENT
FOUNDER & CHIEF EXECUTIVE OFFICER, COURT SQUARE
GROUP

“Having documents in electronic form will also allow us to automate a number of workflows currently carried out manually, thus helping to streamline and increase the speed of legal proceedings, another area of concern for the Ministry.”

CARLO BAULEO
IT OFFICER, ITALIAN MINISTER OF JUSTICE

“Many people drop documents in a folder which is monitored by Adlib. Anything that is placed in our vault must first go through Adlib, so they eventually get their hands on basically any document we receive or create.”

TECHNICIAN LEAD
NATIONAL NUCLEAR RESEARCH LABS

“I like that Adlib has designed a fairly niche product within the PDF rendering space. It is very good at what it does while remaining accurate and fast.”

DEPLOYMENT CONSULTANT
LEADING OIL EXTRACTION COMPANY

TRUSTED BY



charles river





ABOUT AIRSLATE

airSlate WorkFlow

airSlate is technologists, designers, marketers, and educators but first and foremost, they are friends and colleagues. Their mission is to help make people's lives happier, more successful and enjoyable by making their businesses run faster and easier. They believe in giving everyone the opportunity and power to focus on what they love to do. Bringing teams, partners and customers closer together in the process.

54

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“airSlate WorkFlow has been a great addition to our business! It integrates well with Salesforce allowing our team to seamlessly get custom documents ready for signatures within our Salesforce record! The automation that follows is top-notch, making it so that our team is not wasting time and resources uploading and saving documents after they are completed. Also, Igor has been a tremendous help! From when we first got set up to now, Igor has been able to guide us and ensure that we are using WorkFlow in the best way possible to suit our needs. He has also helped us tailor a few things to fit our company's needs. Great product and superb customer service!”

MICHAEL MOORE
INSURANCE ADVISOR, TRANSITION INSURANCE AGENCY

“We've seen success with using airSlate to collect signatures from our families, so we've also started using it internally for inspections and tasks that are sent to our leaders.”

AMBER RIDDLE
CHIEF FINANCIAL OFFICER, LITTLE SUNSHINE
PLAYHOUSE & PRESCHOOL

“There is no need for dual entry; WorkFlow eliminated the risk of errors. All paperwork and signature gathering has become a breeze. There is no longer a need to print, mail, retype, etc.”

SAM GINZBERG
CHIEF INFORMATION OFFICER, ROYAL CARE

“Amazing Platform, Customized for our special needs, Sophisticated, Smart & Cutting-Edge!”

JULIA WHITFIELD
EXECUTIVE DIRECTOR, CHAMP PLAN ADVISORS

TRUSTED BY

closetfactory





ABOUT ANTWORKS



AntWorks is a global artificial intelligence and intelligent automation company, creating new possibilities with data through digitisation, automation and enterprise intelligence. As the world's first and only Integrated Automation Platform (IAP) powered by fractal science principles and pattern recognition that understands every data type, ANTstein™ SQUARE digitises every piece of information for a diverse range of industries.

47

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“AntWorks’ Cognitive Machine Reading engine is one of the most powerful technologies we have evaluated that meets our complex machine vision requirements – of highly unstructured data and document formats, dynamic nature of documents and data that can only be handled with powerful machine learning capabilities. And an ability to deliver superior Natural Language-based classification with limited data sets.”

PREYASH SHAH
ENTERPRISE HEAD OF BUSINESS SOLUTIONS GROUPS,
CRISIL

“AntWorks CMR’s high accuracy across the tested document types, even with small training sets, and its outstanding ease-of-use allows buyers to democratise the use of document cognition across the organisation easily.”

MIKE SMART
SR DIGITAL TRANSFORMATION ANALYST, NELSONHALL

“Deploying the ANTstein solution has been crucial to not only saving time, money and effort, but also enhancing customer acquisition for growth and the re-deployment of staff, focus on strategic innovation and other tasks that require complex thinking.”

CITY UNION BANK

“We needed a solution like ANTstein SQUARE that would not just capture the data, but also curate the data accurately. We are experiencing efficiency improvement of almost 50%”

EMMA FORSTER
MANAGING DIRECTOR, SPARK 44

TRUSTED BY









ABOUT ARTSYL

ARTSYL

Artsyl develops Smart Process Technology to Power Process Improvement. Smart Process Technology reduces business process costs, improves data accuracy, speeds workflows, integrates data with applications, improves visibility and ensures compliance. For over a decade Artsyl has been solving complex customer business process problems with its powerful, flexible and intuitive technology. Global companies like World Vision rely on Artsyl to improve their operations.

85

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“[docAlpha] contributes because it keeps our process paperless. I don't have to worry about a bunch of documents everywhere and losing an invoice. So if I don't see it in the system, the audits haven't received it, which is good.”

SHANELLE HUNTER
ACCOUNTS PAYABLE SPECIALIST, CPOWER ENERGY MANAGEMENT

“The product's most beneficial feature is the ability to scan any text from any kind of a document which then consistently autofill an excel spreadsheet. The possibilities are limitless.”

CHERI ARMSTRONG
DIRECTOR, YOUTH FOR CHRIST

“Now, using the Artsyl docAlpha solution, bills get scanned and the system captures information from the document.”

KATHLEEN BEPKO
MANAGER FOR CLAIMS ADMINISTRATION, WORKERS' COMPENSATION TRUST

“Artsyl's docAlpha solution and continued maintenance support is critical to NRCan's accounts payable.”

RINALDO JEANTY
MANAGER, ACCOUNTING OPERATIONS AND CHIEF OF FINANCIAL SERVICES, NATURAL RESOURCES CANADA

TRUSTED BY





ABOUT FOXIT SOFTWARE



Foxit PDF Editor is an intelligent, simplified document solution that uses Foxit's award-winning user interface to allow teams to create, edit, convert, and manage PDFs with speed and accuracy from any device, within both desktop and cloud applications.

199

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Foxit’s Smart Redact tool has been a game-changer for us. The efficiency it has brought to our assignment submission process is remarkable. Our faculty now spends less time on administrative tasks and more time focusing on teaching and student engagement. Not only has the tool saved us time, but it’s also given us peace of mind knowing that our students’ data is protected. We’re thrilled with the results and look forward to continuing our partnership with Foxit.”

UNIVERSITY REPRESENTATIVE
TOP UNIVERSITY

“As far as editing documents, the PhantomPDF software is a lot better. They can't stop raving about it, one employee was happy that she can now edit the whole document.”

BOB MIKALOUSKAS
NETWORK AND SYSTEMS MANAGER, BARRETT PAVING
MATERIALS INC.

“Foxit PDF Editor has not only saved us money but also streamlined our document workflows across departments, making it easier for our staff to handle PDFs.”

SWANSEA UNIVERSITY

“Foxit's PDF Compressor with OCR was able to convert all documents into text searchable files, allowing for quicker searches.”

HARGRAVES MCCONNELL & COSTIGAN

TRUSTED BY





ABOUT MITRATECH HOTDOCS



HotDocs is the leading provider of automated document assembly technology, globally. HotDocs is a part of the AbacusNext group of companies. Their software allows organizations to transform frequently used documents and forms into intelligent templates that enable the superfast production of custom documentation. Aside from time savings, HotDocs offers reduced risk, enhanced compliance and operational efficiency when producing documents.

85

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“I spent several months researching document assembly software, and no solution out there is as comprehensive, user-friendly, and affordable as HotDocs. Thanks to your service, our company has successfully streamlined the process of executing service contracts, employment agreements, and project documentation. What was once an extensive procedure highly prone to human...”

JACQUELINE CISAR
DIRECTOR OF FINANCE AND HUMAN RESOURCES,
LOCKMANN KRANE

“Through implementation of HotDocs, document production has been significantly improved at J&T BANKA. A central place for document templates has been created and the text and typography of documents is standardised and managed. Through the HotDocs Hub versioning of documents has been secured. Now HotDocs is one of the important banking systems in J&T BANKA. For me personally, as a lawyer, HotDocs opened a whole new...”

JAKUB ŠVÁB
HEAD OF LEGAL, J&T BANKA

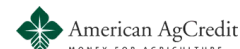
“Take the quality, control and efficiency of HotDocs automated document generation as read. What we are really impressed with is Workspace – the software’s customisable front end – and the development support that we’ve had for it. HotDocs Workspace proved an excellent base for the development of specific document automation solutions and the support for it has been outstanding – prompt and knowledgeable when our queries...”

IAN THOMSON
MANAGER – BUSINESS ANALYSIS, MINTER ELLISON

“We process in excess of 350,000 security and loan documents every year. HotDocs makes the process fast, flexible and efficient, providing us with a readily maintained system.”

HEAD OF CREDIT DOCUMENTATION
ROYAL BANK OF SCOTLAND

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ABOUT NITRO



Nitro is a document productivity company. They make it easy for business teams to convert, edit, share, sign, and analyze documents anywhere on any device. Founded in 2005 in Melbourne, Australia and headquartered in San Francisco, Nitro is used by more than 600,000 businesses, including over half of the Fortune 500.

130

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Switching to Nitro not only saved costs but also provided enhanced insights through Nitro Analytics, helping us understand and proactively manage our licensing based on student and staff usage.”

PRASH SAWANT
SENIOR MANAGER, SERVICE MANAGEMENT PRACTICES,
UNIVERSITY OF MELBOURNE

“With Nitro, we can see the potential to expand coverage to 100% of users, so it becomes more of a core operating software as opposed to a specialist tool.”

PETER FERGUSON
EXECUTIVE MANAGER, INFORMATION AND
COMMUNICATION TECHNOLOGY, CITY OF VINCENT

“[Since deploying Nitro] IT Department time has seen huge savings as it is now rare that we are asked to convert documents for our users.”

MIKE MAHONEY
GROUP IT MANAGER, GRATTE BROTHERS GROUP

“The ease of handling and processing documents across our companies and operations has generated monthly time savings of about 300 hours.”

GÉRARD KORDA
HEAD OF IT SUPPORT, ZFV

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CITY OF VINCENT





ABOUT OCROLUS



Ocrolus is a fintech infrastructure company that transforms documents into actionable data with over 99% accuracy. Powered by Artificial Intelligence and a unique, human-in-the-loop data validation process, Ocrolus plugs directly into customer workflows via API, eliminating the need for manual data work. The solution includes built-in fraud detection and analytics, enabling customers to make smarter and faster business decisions with unprecedented precision.

90

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Ocrolus has streamlined the process by implementing tag capabilities. This ensures consistent income calculations across different employees, eliminating potential discrepancies that may arise when manually determining what qualifies as income. With the tag functionality, everyone follows the same standardized method, resulting in accurate and uniform income calculations.”

AMBER FLORES
SCREENING MANAGER, STYL RESIDENTIAL

“This is where Ocrolus really shines. eCommerce entrepreneurs don't want to spend time recreating statements on other platforms if they can't make the aggregator connection. With Ocrolus, they can easily upload bank statements, and in under two hours we have the data digitized and (more importantly) analyzed against the risk analytics, from a cash flow perspective.”

DENNIS CHIN
HEAD OF STRATEGIC INITIATIVES, YARDLINE

“Ocrolus unlocks data trapped on documents, addressing one of our core issues in operations: We need quality, consistency and accountability in data; this was tough to achieve with manual data entry. Ocrolus solves that problem by pulling data operationally at scale and consistently delivering quality data.”

SRI KAZA
CHIEF EXECUTIVE OFFICER, FORWARDLINE FINANCIAL

“We're enhancing the Blend platform with Ocrolus' automated, accurate document classification and data extraction capabilities. Our partnership with Ocrolus enables us to swiftly deliver time-saving innovations to our customers.”

JEFF BRADDOCK
BUSINESS DEVELOPMENT, BLEND

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ABOUT SQUARE 9 SOFTWARES



The Square 9 AI-powered intelligent information management platform takes the paper out of work and makes it easier to get things done with digital workflows that automate many aspects of how you work today. We make it easy by extracting information from scans or PDFs, storing documents in a searchable archive, and building digital twins of your current processes through graphical workflows.

87

TOTAL CUSTOMER REFERENCES

[VIEW ALL
REFERENCES](#)

FEATURED TESTIMONIALS

“Running files through a scanner and being able to index them immediately is more effective than piling documents up and waiting for someone to file them when they have time. GlobalSearch forces a discipline to manage documents appropriately, and it works wonderfully.”

KATHY WESTOVER
CHIEF FINANCIAL OFFICER, GARDAN, INC

“We are using GlobalSearch to manage sales orders, work order documents and financial records. This robust yet easy-to-use solution has made retrieving and storing documents convenient and fast, saving time and money.”

BRIAN O’CONNOR
IT MANAGER, HARCO LABORATORIES, INC

“GlobalSearch is very user friendly; we can add index fields to the documents in GlobalSearch no matter our locations, and clients can view their information when they need to.”

SHEILA BURAK-FARQUHARSON
OFFICE MANAGER, BOOKS N BILLING

“Adopting GlobalSearch allowed us to manage hundreds of thousands of paper documents quickly and efficiently.”

BILL LINNEY
FOUNDER, CONSTRUCTION RISK PARTNERS



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2025
DOCUMENT
AUTOMATION
SOFTWARE

RISING STAR



ABOUT KLIPPA



Klipa develops advanced cloud-based AI software that streamlines and automates administrative workflows. Our solutions help organizations save time, cut costs, and minimize risks such as errors and fraud. We provide an end-to-end platform for document automation, along with dedicated solutions for expense management and invoice processing. With Klippa, manual document handling becomes a thing of the past.

75

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“We don’t spend countless hours going through thousands of documents per day anymore. Klippa’s OCR has helped us greatly in automating this process and continues to do so with every document we process.”

SOC MANAGER
ONLINE PAYMENT PLATFORM

“Klippa’s solution has truly transformed how we manage expenses and invoices. It’s made our processes faster, more efficient, and has had a positive impact on employee satisfaction.”

TIM LORIJN
FINANCIAL DIRECTOR, LABEL A

“Klippa has not only helped us improve user onboarding but also helped us stay compliant with data privacy regulations. We achieved optimal advantages in both aspects.”

PLAY NORTH

“What makes Klippa unique to me is their willingness to keep innovating. Klippa really listens to user feedback to continually improve the system.”

GEERT JAN VELDTHUIS
FINANCE & IT MANAGER, TRIP ATTORNEYS & NOTARIES

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MyActivHub

DataNorth
klippa

LABEL A

INSPARK

GLS.



ABOUT XAIT



The X factor for winning bids and proposals - We help our clients win business by supporting their sales enablement efforts from quote to contract! Xait is the company behind XaitPorter and XaitCPQ. XaitPorter is a collaborative document production solution that enables several contributors to work on the same document at the same time. This allows management to keep control of the process from day one. XaitPorter automatically takes care of the formatting, layout and numbering according to your guidelines leaving you and your team to focus on the most important part of...

137

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REFERENCES**

FEATURED TESTIMONIALS

“With Word, we had to break the document into sub-documents, assigning responsibilities to each part. This led to a fragmented and serial production process. Co-authors didn't really work on the same document in real time. Each person had to work on it one at a time and then email it to the next person in line, so that they could do their part. This made it hard to keep track of the original content and manage the many different versions.”

PÅL LILLEBØ
CHIEF EXECUTIVE OFFICER, DINHMS

“With so many people working on the same document, we need to be able to track changes. Word has a good system for this, but if you can't open the right version, you can't keep track of what changes have been made. It gets even messier when the document crashes and you can't save your work.”

SØLVI AMUNDRUD
PRINCIPAL ENGINEER, NORWEGIAN PETROLEUM
DIRECTORATE

“XaitPorter has made a real difference within our organisation. It makes it easier, faster and cheaper to collaborate and write documents for bids, consultations and internal policy.”

DAVID PLUMMER
ASSOCIATE DIRECTOR BUSINESS DEVELOPMENT, NHS
LOTHIAN

“Having multiple employees, across different locations, working simultaneously in the same document on Sharepoint created a massive headache for us.”

TOMMY SAMUELSBERG
CHIEF GEOLOGIST, ARGEO

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Eurotherm
by Schneider Electric

Europcar

bouygues
TELECOM

ENGIE
Solutions

DEEPOCEAN



ABOUT XPRESSDOX



XpressDox is a Document Automation Software and API for Web, Servers, Apps, and Desktop, designed to be your perfect document automation suite with customizable components created to work together seamlessly. Integrates easily with databases, web services, and other APIs. Powerful and easy to use.

7

TOTAL CUSTOMER REFERENCES

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FEATURED TESTIMONIALS

“XpressDox was selected because of its superior speed in assembling a very complex template, its attractive and customizable user interface, the ease with which we could integrate with databases and the responsiveness of the vendor to our needs.”

DOUG SIMPSON
FOUNDER, FLEXCLAIM

“For me, the standout feature of XpressDox is its ability to save information from a template and reuse it in other templates at a later stage. Love it, and also love the excellent support I get!”

BEV WILLIAMS
HOGAN LOVELLS

“XpressDox is a very powerful tool to automate a wide variety of templates, which allowed us to significantly increase productivity and eliminate errors.”

RACHELLE THOMSON
BUSINESS SOLUTIONS MANAGER, FASKEN MARTINEAU DUMOULIN

“We specialize in integrating XpressDox with web and mobile apps. Data access and ease of deployment are the stand out features for us. We couldn't be happier.”

CHARL DREYER
FOUNDER, DOCCLY

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flexClaim

