

Document Automation Software Category

FALL 2026
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.

2026 Customer Success Awards

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



ABBYY

Adobe conga DocuWare

ESKER

experlogix

Intellistack

nintex



PandaDoc



templafy



ActiveDocs



ADLIB

airSlate

WorkFlow



ANTWORKS

ARTSYL

foxit

HOTdocs™
MITRATECH



nitro



Ocrolus



square9
softworks



contentverse
from computhink



smart
Documents



X A I T®

* Companies listed in alphabetical order



2026
DOCUMENT
AUTOMATION
SOFTWARE

MARKET LEADER





ABOUT ABBYY

ABBYY

Recognized as a Leader in Intelligent Document Processing (IDP) by Everest Group, ABBYY offers a complete range of AI-based software solutions to transform business documents and data contained within content into business value. The company sets the standard in content capture and innovative language-based technologies that integrate across the information lifecycle. ABBYY solutions are relied on to optimize business processes, mitigate risk, accelerate decision making and drive revenue. ABBYY technologies are used and licensed by some of the largest international enterprises and government organizations, as well as small and medium businesses...

682

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“ABBYY software has proved its potential to process documents that are more than 20 years old — that is, documents that were filled out with a typewriter and not with high-quality printers that exist today. It lived up to all our expectations and met all the requirements.”

REPRESENTATIVE OF LUZ DEL SUR
LUZ DEL SUR

“ABBYY’s parallel processing of documents in need of OCR is outstanding. On a single server, customers are achieving up to 30,000 pages per hour. ABBYY has brilliant OCR software that works every time.”

EDDIE SHEEHY
CHIEF EXECUTIVE OFFICER, NUIX

“Our ability to easily access documents, provide greater records security as well as provide immediate company-wide record viewing has been tremendous. ABBYY has been the hub of this whole process.”

LAURENCE GRIGG
RECORDS SUPERVISOR, APACHE CANADA

“The solution has enabled us to reduce our administration overheads and accelerate the process of document delivery, resulting in improved client relationships.”

PAUL WALSH
PARTNER, MOORE BLATCH

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L'ORÉAL





ABOUT ADOBE

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.

3264

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Most of the documents we receive from our customers, such as invoices and packing lists, are now sent as PDF files. Documents created in-house are converted to PDF when possible for improved management and operations.”

KOJI MURAMATSU
GENERAL MANAGER OF THE INFORMATION SYSTEM
DEPARTMENT, “K” LINE LOGISTICS

“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

“Adobe Document Cloud provides tools and services that are ideal for leveraging global document management to accelerate the digital transformation of our business processes.”

JENS HITMEYER
HEAD OF CORPORATE INFORMATION TECHNOLOGY,
KWS SAAT SE

“With Apttus and Adobe Document Cloud eSign services, we can develop faster and smoother sales cycles that boost staff productivity by reducing administrative work and errors.”

AMY ROY
VICE PRESIDENT OF SALES OPERATIONS, DAYFORCE

TRUSTED BY





ABOUT CONGA

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...

389

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Conga Composer has cut quote change turnarounds by about one week. Redoing documents was a huge task for sales directors, and revisions were unnecessarily time-consuming. Now, they can quickly change entries in Salesforce and generate a new price quote with one click.”

AUDREY CHILD
SALESFORCE ADMINISTRATOR, ACCESSO

“Your hamburger and your fries go together with your drink, and you're going to have a cheaper price, obviously, if you buy products together. When our customers understand what products work together and how they work together, our approvals go way faster.”

MARY ANGUAY
VICE PRESIDENT OF SALES OPERATIONS, EXTERRO

“Conga is strategic for us. It provides process improvement opportunities in our high-touch segment and also automation opportunities for the customers in our no-touch, high-volume segment.”

MANUEL LOPEZ
SR. LEADER OF STRATEGIC CONTRACTING & PROPOSAL MANAGEMENT, COTALITY

“Customer service is our product. That's where we excel and that's what our reputation is built on.”

DOUG RICHARDS
SENIOR VICE PRESIDENT, COOPERATIVE FINANCE ASSOCIATION

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.

521

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Thanks to DocuWare, we’ve been able to avoid adding another full-time employee to the accounting department—which we would otherwise need to keep up with the volume of invoices. The key advantage in terms of order processing is that all information is available immediately. We used to spend a great deal of time searching for information, which slowed down the process. On top of that, we now print about 270,000 fewer documents each year.”

EILEEN SPIES
HEAD OF ACCOUNTING, GIEBELER-FEUEFSCHUTZ

“DocuWare was originally used in the accounting department, to digitize and manage incoming invoices. After we implemented it, we could immediately see how it could be used as a toolbox for designing processes for all sorts of departments, and do this uniformly, throughout the Group. It has had great additional benefits.”

FLORIAN HIERONIMUS
HEAD OF APPLICATION AND IT SERVICE MANAGEMENT,
EHRHARDT + PARTNER

“The document management system DocuWare is a key component of our digital transformation. The processes in which we already use the solution have become faster, more transparent and more efficient. DocuWare Cloud offers us the highest level of security while providing broad availability to our documents.”

JUAN JOSÉ DEL PRADO GÁLVEZ
IT PROJECT MANAGER, SWIFTAIR

“DocuWare has accelerated and simplified our processes, enabling us to focus on our projects and ensure our time and resources go where they are most needed.”

YVES MANANA
IT-MANAGER, ENDANGERED WILDLIFE TRUST

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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...

776

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Esker is simple and straightforward for the Customer Experience team to use, providing clear and concise visibility into the application status. This enables us to focus on what is needed at each stage and clearly identify who owns each action — all in one centralized place. As a result, onboarding has become more streamlined, as Esker gives us full visibility into the required actions and whether they are sitting with the customer or our internal team.”

SUKI DHILLON
CUSTOMER EXPERIENCE MANAGER, AAH
PHARMACEUTICALS

“Esker displays clear workflows and checks the data provided by the customer against the internal system to highlight any differences, making reverification a lot smoother. This makes the process noticeably faster, and having a clear audit trail is a huge advantage.”

JAKKI-LEE SWIFT
REGULATORY COORDINATOR, AAH PHARMACEUTICALS

“Esker has been a huge success for True Alliance! We have seen a significant workload reduction with the automation of allocations, I can't imagine going back to the manual process where it could take a whole day to do certain customer allocations.”

ELENA LIKHOROVITCH
CREDIT MANAGER, TRUE ALLIANCE

“Esker stood apart. I have never worked with a more trustworthy, capable and collaborative team!”

BILYANA GAVRILOVA
SENIOR DIRECTOR, CATALINA

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ABOUT EXPERLOGIX



Experlogix is an enterprise SaaS company that helps businesses simplify sales and revenue growth while improving productivity. Our solutions cut through operational complexity, so your teams move faster and deliver experiences customers love. Since 2000, we've empowered thousands of organizations worldwide with two product lines that work together or independently: • CPQ (Configure, Price, Quote): Replace spreadsheets and manual reviews with intelligent configuration, pricing, and approval workflows. Generate fast, accurate quotes in...

247

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Experlogix is quite flexible and user friendly. There are many ways to go about consolidating information you need, and the speed and ease of that, and the confidence it provides management is a significant improvement over what we had before.”

TERRY SOLOMON
SALES SUPPORT MANAGER, HUSKY

“Experlogix is making things easier for our newcomers – removing the reliance on tribal knowledge. It's been a great part of the software.”

ROLAND PROSKE
HEAD OF IT AND DIGITAL, FOTOFINDER SYSTEMS

“The staff at Experlogix was amazing. They were willing to work at our pace and meet our deadlines.”

WILLIAM LITHGOW
DIRECTOR OF MANUFACTURING AND OPERATIONS, EYE DESIGNS

“When I saw the capabilities in Experlogix, I knew it was exactly what I had been wanting.”

NATE BOWIE
VICE PRESIDENT, SALES, REVISION ENERGY

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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

“Having used Formstack for a couple of years now and knowing that I can count on it to do what I need to do really matters to me. It frees me up to think creatively about what is possible.”

ANDREW MEYERS
PROGRAM CHAIR, EDUWEB

“Formstack is always improving their platform based on feedback from users.”

SAMANTHA LOWDER
MANAGER OF COMPLIANCE & DATA, NATIONAL JUNIOR COLLEGE ATHLETIC ASSOCIATION (NJCAA)

“Formstack allows for documentation and a paper trail, with an audit report for contracts.”

BRITTANY TREWARTHA
OPERATIONS PROJECT SPECIALIST, LITTLESTAR ABA

“Formstack empowers us to make and customize solutions.”



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TinderBox





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.

714

TOTAL CUSTOMER REFERENCES

[VIEW ALL
REFERENCES](#)

FEATURED TESTIMONIALS

“[Nintex] Automation K2 really filled the gap. We can start taking things that people do without even thinking and automate them so that other people can do them without having to know. This will really help us move the company to the next level.”

CORY LORIOT
SENIOR SHAREPOINT SOLUTIONS ARCHITECT,
PROLIANT

“Nintex Process Platform was and still is by far the most flexible and easy-to-use than any of the other form creation and workflow designer apps we looked at.”

JULIAN NYE
BUSINESS ENABLEMENT ENGINEER, AUCKLAND
TRANSPORT

“Nintex (formerly Skuid) and Lightning are seamless. My team doesn't have to think about what system they're working in, they just know that they can get their job done.”

NADIA ALIA
DIRECTOR OF OPERATIONS, THE TOW FOUNDATION

“Nintex stacks high among the tools available.”

KATHY MARK
ITT PROJECT DIRECTOR, SFO AIRPORT



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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

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“PandaDoc’s API integration has been a transformative tool for Colonies as we continue to scale across new properties and countries. Each lease is automatically tailored to meet regional legal requirements and property specifics, saving countless hours in document preparation and significantly reduced errors. Automating these processes within our platform has not only improved tenant satisfaction but also empowered our team to focus on expanding our reach and enhancing our offerings.”

THOMAS GUILLOT
VP DIGITAL, COLONIES

“PandaDoc has leveled up the way our teams collaborate. The silos that used to cause challenges between teams have greatly improved by having a solution that is consistent, reduces errors and saves countless back and forth to send documents to customers. PandaDoc is more than just a tool, it’s a catalyst for growth and collaboration.”

MOHAMMED AL HADRAMI
SALES OPERATIONS CONSULTANT, INVERS

“PandaDoc completely transformed how we handle renewals. It’s gone from being a ‘nice-to-have’ to an absolute must-have.”

CHASE KING
CUSTOMER SUCCESS OPS MANAGER, POLL
EVERYWHERE

“If you’re already using PandaDoc and your company’s growing, the Business Plan is a no-brainer. It simplifies your day-to-day so you can focus on what matters.”

AIDAN NORTHCOTT
VP OF FINANCE, TERRASENSE

TRUSTED BY

Aprio



patagonia



GROW



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...

115

TOTAL CUSTOMER REFERENCES

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FEATURED TESTIMONIALS

“Templafy has completely transformed how we create quotations. The process is faster, and all department-specific details are automatically included, which reduces risks and ensures accuracy.”

SARAH BORNGRÄBER
HEAD OF PROGRAM STRATEGY AND EXECUTION, SSI
SCHAEFER GROUP

“Templafy saves us two business days per document. We’re saving over 13,000 work hours each year across teams. That’s about 550 working days. That’s huge.”

FRANZISKA MALEV
QUOTATION TOOL ADMINISTRATOR, SSI SCHAEFER
GROUP

“Templafy has made our templates much more accessible and much easier to update. It has clearly become our source of truth—if it’s in Templafy, it’s correct.”

ELIZABETH BOUDRIE
SENIOR VICE PRESIDENT, EVEREST GROUP

“Templafy made cloud-transition simple, while also streamlining the use and administration of templates and digital assets across several different locations.”

CAPITAL REGION OF DENMARK

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STANTON CHASE





2026
**DOCUMENT
AUTOMATION
SOFTWARE**

TOP PERFORMER



ABOUT ACTIVEDOCS



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.

163

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“With ActiveDocs Opus there’s one golden version of the language that everyone in the regional offices uses, so they’re always getting the correct content.”

JEFF MARTI
ENVIRONMENTAL PLANNER, WASHINGTON STATE
DEPARTMENT OF ECOLOGY

“ActiveDocs was selected for implementation at Hitachi ABB Power Grids based on their proven track record generating superb documents and providing powerful template management.”

HITACHI

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

SHAW COMMUNICATIONS

“ActiveDocs offers flexible and powerful features for document automation.”

AUTOMATION TOOL RESEARCH TEAM
TECHNICAL UNIVERSITY OF MUNICH

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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.

178

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Adlib is integrated with Enovia, our active quality management tool. Every file type is rendered through Adlib as all materials are required to be stored as PDFs. The files we are processing can be a mixture of different things such as product specifications, ingredients, formulas, raw materials used in products, or specifics of packaging.”

SR. MANAGER PLATFORM
LARGE PHARMACEUTICAL MANUFACTURER

“Adlib is fully embedded within M-Files. They have paired very well with each other which has kept us happy. When we were selecting Adlib, a key reason we did so was due to Adlib telling us how easily their software partners with other systems.”

ASSOCIATE DIRECTOR AND SR. MANAGER
LEADING CONTRACT RESEARCH ORGANIZATION

“Automated PDF transformation from Adlib has enabled us to reduce our costs associated with the delays and errors of manual intervention within business processes.”

IT PROJECT MANAGER
STATE GOVERNMENT AGENCY

“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



City of
SACRAMENTO



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

“WorkFlow has allowed us to compress the sales cycle and recover some losses that resulted from a disjointed process. I'm no longer chasing people down to get a missing signature or make sure their payment is going through or hunting down a client I can't get a hold of. Now, we get what we need the first time around.”

ALEX NEWMAN
VICE PRESIDENT, CLOSET FACTORY

“airSlate saves our Sales team a tremendous amount of time and allows us to assign resources a lot quicker. Thus, our customers get engaged a lot quicker, and we can get everything started much sooner these days.”

PAUL SCIANDRA
COO & HEAD OF PROFESSIONAL SERVICES PRACTICES,
OUTSOURCE MANAGEMENT INC.

“The support we received from airSlate was above and beyond what we usually experience with other vendors. airSlate personnel are all extremely knowledgeable and helpful.”

ANTHONY MATERO
OPERATIONS, T2 BIOSYSTEMS

“Essentially, airSlate is paying for itself with the positive impact it has had on our workflow.”

ALLEN G. MUTCHLER
REGISTRAR, NEWSCHOOL OF ARCHITECTURE & DESIGN



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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

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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

“Our first implementation with CMR, we were able to realise a very high accuracy in the conversion rate. In fact, we realised more than 85 percent to be exact.”

JASON CHIN
VICE PRESIDENT OF IT, SCOOT

“AntWorks has risen through the ranks of global RPA, Automation and Artificial Intelligence companies with a ferocity that’s unprecedented in the industry.”

YOSHITAKA KITAO
REPRESENTATIVE DIRECTOR, SBI HOLDINGS

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.

90

TOTAL CUSTOMER REFERENCES

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REFERENCES**

FEATURED TESTIMONIALS

“A single IPA tool proves transformative for Cobalt’s accounting department as they are able to scan, process, and reconcile payments in one go – and not even having to worry about shortage of personnel.”

MELINDA WEBB
SR. PROGRAMMER ANALYST, COBALT BOATS

“Using Artsyl ClaimAction our first client was in production within a few months. FVtech’s identification rate for UB04s has grown from zero percent to 85 or 90 percent.”

JOSE DIAS
DIRECTOR OF ENGINEERING, FUTUREVISION TECHNOLOGIES

“SimpleCapture was easy to set up and use and it was far less expensive than the alternatives we evaluated.”

JOHN P
VICE PRESIDENT OF FINANCE, LEADING CANADIAN LOGISTICS SERVICE PROVIDER

“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



HIRSCHFELD
INDUSTRIES





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 eSign has been a total solution for all my e-signing needs. Since I'm in the financial industry many of my documents need to be signed. Allowing our clients to sign online without printing, scanning, faxing, or emailing anything is a game changer. There are many options out there for eSigning and I've used several. However, Foxit eSign has the best software, the best customer support I've ever seen (Lisa is who helps me most of the time and she is AMAZING) and all at a price that is a fraction of the competition.”

RANDY WEBSTER
SENIOR UNDERWRITER, REACHOUT CAPITAL

“With the attention already being there, for a product still in the prototype stage at that time, QuickPDF was our hero to help implement a first fully functional product in a short period of time.”

OLIVER GRAHL
OWNER, GRAHL SOFTWARE DESIGN

“We have had no complaints about Foxit PDF Editor. People here at Protector are quick to adapt to new products, and Foxit does exactly what it says on the tin. It's costeffective and works perfectly for our teams.”

LEADING INSURANCE PROVIDER

“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

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.

86

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“HotDocs has made it possible to provide consistent information to Social Security beneficiaries and increase the number of individuals served by the WIPA programs. HotDocs is very reliable and easy for users to master. Over the past year, it has been used by 300 Community Work Incentive Counselors to assist over 13,000 beneficiaries achieve their employment goals and improve their economic self-sufficiency.”

JOHN KREGEL
VIRGINIA COMMONWEALTH UNIVERSITY SCHOOL OF
EDUCATION

“It was the right fit for us – HotDocs is the worldwide leader in document automation. We had a good dialogue with the sales and technical support teams on the front end. They were able to troubleshoot and understand our robust processes and work through how HotDocs Advance could fit our needs.”

VICE PRESIDENT
LARGE FINANCIAL SERVICES ORGANIZATION

“HotDocs has become such an integral part of the way we work that it is now inconceivable that we could ever do without it.”

JOHN NACCARATO
PARTNER, BANKING & INTERNATIONAL FINANCE, CMS
CAMERON MCKENNA

“HotDocs saves a lot of time and repetitive typing.”

THERESA YOUNG
MIDLOTHIAN COUNCIL

TRUSTED BY

C'M'S' Cameron McKenna

Ballard Spahr
LLP



X Insurance
Reinsurance





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.

131

TOTAL CUSTOMER REFERENCES

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FEATURED TESTIMONIALS

“Nitro is ideal for educational institutions like ours. Nitro has simplified license management, improved usability, and significantly reduced our costs. It's a solution tailored for educational institutions like ours, balancing affordability with functionality.”

THOMAS SCHWARZEMBACHER
UNIVERSITY OF BREMEN

“Nitro's understanding of mozzeno's needs drove a strategic deployment tailored to our unique challenges.”

FREDERIC DUJEU
CO-FOUNDER, MOZZENO

“Nitro Sign is an essential part of our business. We wouldn't be able to do what we do without it.”

XAVIER KLUYSKENS
DIRECTOR AND CO-FOUNDER, PB PLUS

“Nitro went the extra mile to make our onboarding process a success.”

JOESPH DERR
VICE PRESIDENT OF IT, SENECA

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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.

117

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Ocrolus has been amazing for us and we're super happy. It's going to save you so much time. You're going to truly see how efficient it can be, how much you can free up that's currently spent getting through a loan, how accurate your income can be, and how you can assist loan officers who are struggling without adding additional people.”

ESPERANZA TIMOTHEE-LORDA
REGIONAL PROCESSING MANAGER, NEIGHBORHOOD
LOANS

“Ocrolus is helping us help our clients. It allows them to process more documents faster so they can then reallocate that human capital in other areas of the mortgage underwriting process that cannot be automated.”

AK PATEL
FOUNDER AND CEO, LENDSMART

“Ocrolus has enabled small business owners to get an offer that much quicker, and it's really helped secure our underwriting processes.”

MIKE BORAK
SENIOR VICE PRESIDENT, KAPITUS

“Using Ocrolus' Cash Flow Analytics reduces manual calculations and develops analytics that improve future underwriting decisions.”

PHILIP TALIAFERRO
CHIEF GROWTH OFFICER, LENDIO

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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.

151

TOTAL CUSTOMER REFERENCES

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FEATURED TESTIMONIALS

“We would definitely recommend GlobalSearch for a number of reasons. Every single person we have been in contact with at Square 9 has been extremely helpful, courteous and patient. When we first implemented GlobalSearch, our questions were carefully answered so that we felt comfortable and confident that we understood the software. The system itself is very easy to use and convenient. It is fully customizable to suit our own specific needs and it can be used as a basic Document Management system or a more detailed one. Out of the programs we saw, GlobalSearch was the best option for Accurate Professional Billing.”

KATIE MARTINEZ
OFFICE MANAGER, ACCURATE PROFESSIONAL BILLING

“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

“We are always recommending GlobalSearch! The ease of use and having such advanced capture and workflow capabilities all from one product is outstanding.”

CHRIS MCDONALD
SOLUTIONS SPECIALIST, CALTRONICS BUSINESS SYSTEMS

“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

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2026
**DOCUMENT
AUTOMATION
SOFTWARE**

RISING STAR



ABOUT CONTENTVERSE



Contentverse is a comprehensive document management platform designed to help businesses organize, secure, and collaborate on their documents with ease. Whether you're handling large volumes of data, ensuring compliance, or simply looking to improve your team's productivity, Contentverse has the tools to streamline your workflows and keep your information accessible and secure.

106

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Before we used Contentverse, when we filed our production documents it took 3-4 hours a day. We were able to cut that down to 15-20 minutes per day. Contentverse helped us save time and find documents instantly, which made our customer service more efficient and more effective.”

DAN GRAMMATIKOS
VP FINANCE, KOCHER + BECK

“We are extremely pleased with the Contentverse solution and the implementation and ongoing support provided by Cube Innovations, We highly recommend their products and services.”

FRESHLY FROZEN FOODS

“Contentverse has helped to improve efficiency, security, and provide independent access to documents without making request for physical file provision.”

CORNERSTONE

“Contentverse offered exactly what we expected and more, So we have no hesitation in recommending their products and services.”

AHMED SEDDIQI & SONS

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ABOUT SMARTDOCUMENTS



SmartDocuments is developed in such a way that employees can create perfect documents with minimal effort in no time at all. They have a no code solution. SmartDocuments has over 25 years of experience in multiple countries. From ministries requiring the highest security standards to smaller organizations with complex documents as well as multinationals processing many documents. When using their software, you first create smart templates that then turn into interactive documents. This saves every employee a considerable amount of time. In addition, the content will always meet the highest standard and match your corporate...

60

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**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Automation has been the game changer for us. I have come up with a few other areas of the business we could use this solution and I will be promoting it to our efficiency committee as well. We are a quite a big organization, there might be other opportunities for instant time saving with SmartDocuments. It's really a no-brainer for us.”

STEPH HAMEL
FINANCIAL CONTROLLER, TRAVEL CORPORATION
LIMITED

“With the help of SmartDocuments, we've really been able to take steps in that direction. The system has reduced our administrative burden, and more importantly – and this's what it's all about in the end – it has made it possible to give the people of Leusden unequivocal answers.”

MARJOLIJN WINTER
QUALITY ADVISOR, LARIKS LEUSDEN

“SmartDocuments has achieved an enormous improvement in quality through consistent use of existing data. Fewer errors are made because data no longer needs to be retyped.”

KURT VAN DUEREN DEN HOLLANDER
PROJECT LEADER, MUNICIPALITY OF TILBURG

“For Hoorn, SmartDocuments is the document creation software. The corporate identity and all text components that are needed are contained in SmartDocuments.”

BEN BODEWES
APPLICATION MANAGER, MUNICIPALITY OF HOORN

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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...

146

TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“XaitCPQ is far more than just a product configurator as it reaches into every area of our business, bridging information and functionality gaps by seamlessly integrating with our ERP system and web application. It extends both the functionality and ROI of our legacy systems, allowing us to consolidate our leading position in the market.”

BRIAN ONIONS
MANAGING DIRECTOR, YALE DOOR

“The approach with XaitProposal coincided with a more global sales approach, in particular the creation of a marketing department. We wanted to harmonize our offerings, promote relevant content and best practices, and ensure quality rendering. Our aim was to add even more value to our offers in the eyes of the client.”

ELISABETH MORIZE
MARKETING PROJECT MANAGER, LEON GROSSE

“We appreciate working with Xait's highly professional teams. As well as being extremely friendly, our Project Manager is very professional and listens to the customer until we're satisfied. It's very reassuring.”

DELPHINE REPETYLO
SALES SUPPORT MANAGER - SALES PERFORMANCE,
EUROPCAR

“We've gained in quality, layout and time thanks to XaitProposal.”

CORINNE CHARLES BIDET
SALES PERFORMANCE DIRECTOR, EUROPCAR

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Esker



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