

aws marketplace

PandaDoc

Reviews, tips, and advice from real users



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Product Recap



PandaDoc

PandaDoc Recap

PandaDoc is a highly-rated document automation software with an easy-to-use interface, advanced analytics, customizable templates and workflows, mobile app, and integrations with other business software. It offers electronic signatures and excellent customer support.

PandaDoc is a digital document platform built to support sales, marketing, and administrative teams. PandaDoc's cloud-based interface and advanced features allow companies in multiple industries to sell, collaborate, and manage more effectively.

Valuable Features

Excerpts from real customer reviews on PeerSpot:

- ✓ “PandaDoc is a very powerful tool and is very cost-effective, making it affordable for any size of organization.”



Bitanap Marion

Business Development Manager at Nestle

- ✓ “We have been able to retain our clients globally, sending documents, letters, and everything through PandaDoc with a professional appearance, and they are able to sign it on the go, especially using their mobile phones, and they are very satisfied with our services.”



Gemam Mosik

Senior Software Engineer at Lee Hecht Harrison, LLC

- ✓ “PandaDoc has positively impacted my organization by significantly improving standardization across the company and efficiency in proposal writing.”



Neliwi Margaret

Business Development Manager at Capgemini

- ✔ “PandaDoc has positively impacted my organization by decreasing the time to create documents from forty percent to approximately twenty-five percent, making efficiency in tracking sent agreements very easy and flawless, and enabling excellent collaboration on documents to approve changes while remaining very easy to use and cost-effective for both our clients and our employees.”



JohnMartin9

Digital Marketing Manager at Shell

- ✔ “PandaDoc is a great tool, especially when sending contracts to my clients.”



Devexa Martin

Java Software Engineer at UPS

- ✔ “My main use case for PandaDoc is that it has been a game changer, especially in my organization because it saves our sales reps hours per week on documentation.”



Kirkwood Bernice

Software Engineering Manager at MetLife

- ✔ “PandaDoc is a game changer for our organization.”



Christine Chelsea

Team Lead at Unilever

What users had to say about valuable features:

“I appreciate the HubSpot connectivity with PandaDoc, as that is helpful for our team. In my opinion, the best features PandaDoc offers are e-signature, editing, and the connectivity with HubSpot.

PandaDoc has positively impacted my organization by helping to move the approvals faster and get the agreements in. The approvals are now one or two hours faster. The HubSpot integration specifically helps my team by saving time, as we can connect directly from HubSpot to PandaDoc..”

Raya Durai

sales ops lead at a computer software company with 51-200 employees

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“PandaDoc offered the best feature in its template functionality, which made things a little bit easier. We would have everything saved when it came to all the legal jargon, and it allowed us to quickly fill in the table with the job titles and the services, and it would calculate everything immediately. It also allowed us to add video, which was a game changer. More specifically, it really made our lives easier when it came to tracking if someone had opened the proposal or not because we could send them specific links and we could see how much time they had spent even reading a specific page. PandaDoc has positively impacted my organization by enabling faster turnaround times..”

Ricardo Neves

Senior Project Manager at a consultancy with 51-200 employees

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“The best features PandaDoc offers include the ease of creating a document and getting it signed, and the signed copies are also delivered to the parties, which is great.

What makes the document creation process easy for me in PandaDoc is that drafting the document is straightforward.

PandaDoc has positively impacted my organization by helping in creating the document and getting it signed, reducing the manual work of creating and sending it via mail, and sending the signed copies back again..”

Verified user

Devops Engineer at a tech vendor with 51-200 employees

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“The best feature that I love in PandaDoc compared to other tools is that it has variables that when filled up with values, they seem part of the contract, while other contract management companies use the drag and drop feature, which is sometimes good, but sometimes we just want the content to fit in the document.

Another feature that stands out for me would be the ability to pay right in the document, where a customer can pay using Stripe connected with PandaDoc, and that can help us smooth our payment processes.

PandaDoc has a major impact on our workflow. Previously, we had been creating contracts manually, and whenever a client was closed, we had to go to PandaDoc and create it manually. With the integration and the automation that we created, it has improved our workflow and has saved us so much time. I would say at least 10 to 15 hours per week is saved by this..”

Muhammad Haseeb Saleem

Revenue Operations at a non-profit with 11-50 employees

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“The best features PandaDoc offers include filling information for HubSpot, ease of use for those who are technologically challenged, and the ability to create several templates for all different instances.

“PandaDoc has impacted my organization positively as it has been a game changer overall. It simplified the enrollment processes for us, created a system where all documents would be saved properly and not forgotten, and very securely. Also, it is very easy to use for both us and our clients.

“Time saved creating documents and contract language has resulted in great efficiency and an excellent customer experience. We have been able to save approximately 50% of our time. I measure the 50% time savings through turnaround and quick document sending and creating through the templates..”

Christine Chelsea

Team Lead at Unilever

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“PandaDoc offers many best features including audit trail, tracking, instant updates, customer support, ease of use, seamless integration, intuitive user interface, ease of template creation, and customizable templates.

“Out of those features, we find ourselves using the customizable templates the most, which allows for a tailored document creation process based on individual needs. I also love the ability to combine multiple documents in one go, which is very effective by saving us time. Integration with HubSpot and Salesforce has been great and enhances the overall user experience, especially for the sales representatives in my organization. It makes it very easy to use for anyone in my organization.

“The intuitive and user-friendly interface makes it very easy to navigate and complete the onboarding process.

“PandaDoc has positively impacted my organization by being very helpful in streamlining our processes..”

Kirkwood Bernice

Software Engineering Manager at MetLife

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Other Solutions Considered

“I previously used Adobe Acrobat Sign before PandaDoc. The reason why we switched from Adobe is that it is kind of complex and not so cost-effective compared to PandaDoc..”

Christine Chelsea

Team Lead at Unilever

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“I used DocuSign before and I used Simple Sign, but PandaDoc's UI is much easier for your eyes, and the variable feature that PandaDoc has is what I appreciate.

I was already using DocuSign before PandaDoc and had already tried Simple Sign, but after PandaDoc, I stayed at PandaDoc..”

Muhammad Haseeb Saleem

Revenue Operations at a non-profit with 11-50 employees

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“Before using PandaDoc, we used DocuSign, where we were facing many troubles with signature and those kinds of things. After PandaDoc, it has become streamlined. We previously used DocuSign in our company, which was not that great or user-friendly, so we moved to PandaDoc..”

Raya Durai

sales ops lead at a computer software company with 51-200 employees

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“I used DocuSign before and I used Simple Sign, but PandaDoc's UI is much easier for your eyes, and the variable feature that PandaDoc has is what I appreciate.

I was already using DocuSign before PandaDoc and had already tried Simple Sign, but after PandaDoc, I stayed at PandaDoc..”

Muhammad Haseeb Saleem

Revenue Operations at a non-profit with 11-50 employees

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“I wasn't responsible for choosing PandaDoc, so I cannot answer that question, but I use an alternative now at my current job. I'm currently using Scoro, and when it comes to proposal preparations, it seems to hold a little bit more data. That said, Scoro misses the part of PandaDoc where we actually have some more information in a document format while Scoro is more geared towards numbers only..”

Ricardo Neves

Senior Project Manager at a consultancy with 51-200 employees

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ROI

Real user quotes about their ROI:

I have seen a return on investment, with fewer employees needed because PandaDoc easily replaces the work of two of our administrative employees. I also appreciate that it is very time-saving in creating documents while using templates, integration with HubSpot, and improving the user experience. This leads to great employee efficiency and maintenance of standards, thereby increasing productivity.

JohnMartin9

Digital Marketing Manager at Shell

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“I have seen a return on investment because this tool has helped improve cash flow from the ability to collect payments. It helps me keep track of which contracts a client has signed. Templates have allowed me to both standardize proposals yet allowed rapid customization for each specific customer while saving a lot of time..”

Christine Chelsea

Team Lead at Unilever

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“I have seen a return on investment as it allows me to enter into agreements with clients faster. It saves time with creating templates which can be used later. It saves cost, as forty to fifty percent of my cost is saved, especially because I do not have to move from one place to another to go and sign the documents..”

Devexa Martin

Java Software Engineer at UPS

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“Since using PandaDoc compared to my previous process, I have saved time, and it is completed in minutes.

PandaDoc helps with handling amendments to documents, making that process easier and saving time..”

Verified user

Devops Engineer at a tech vendor with 51-200 employees

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“I have seen a return on investment, with huge time savings in drafting and sending documents to clients. Approximately thirty to fifty percent of time is saved in drafting and sending the documents, and I also love the easy-to-view dashboard that saves time in checking the status of any documents and provides insights such as clients' views versus signs. We are able to guide our clients on where to sign and what to do. It has also streamlined the editing and back and forth of documents with clients, as you can turn on suggestions for clients to make changes if required..”

Kirkwood Bernice

Software Engineering Manager at MetLife

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“I can share specific outcomes or metrics that include an improvement of security from 30 to 55%, with a time saving of 60 to 85% when dealing with documents to be signed, and overall administration efficiency has also improved.

“I have seen a return on investment with a quicker turnaround on our contracts, making it a very cost-effective product for our company, saving us a lot of money, and efficiency has increased, with customer experience being great and the tracking ability of our customer's documents being top-notch..”

George Peterson

Data Analyst at a tech vendor with 10,001+ employees

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Use Case

“My main use case for PandaDoc is for agreements and e-signatures. I will be using PandaDoc to generate the agreements after deal closure, and after the agreement review internally, I will be sending it to the client. They will verify, and then we will be sending it out for a signature..”

Raya Durai

sales ops lead at a computer software company with 51-200 employees

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“I use PandaDoc to create contracts and sometimes even send invoice estimates. Recently, I created an automation where I connected PandaDoc with Pipedrive, and once a deal is moved to a certain stage in Pipedrive, the contract is created and sent to the person..”

Muhammad Haseeb Saleem

Revenue Operations at a non-profit with 11-50 employees

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“My main use case for PandaDoc is for creating a document for signing and acknowledgement.

A specific example of a document I have created and sent for signing or acknowledgement using PandaDoc is an NDA document that needed to be sent to a vendor for signature.

When I sent that NDA to the vendor, I found the process smooth, and the workflow stood out positively to me..”

Verified user

[Read full review](#) 

Devops Engineer at a tech vendor with 51-200 employees

“My main use case for PandaDoc was preparing proposals. We had a lot of one-off projects, and we used PandaDoc to prepare the quotes for these projects. These could be very small projects and PandaDoc would just have one or two pages, or very big projects such as campaigns where we would break down things in even more detail and the document could have quite a few pages. The projects I worked on with PandaDoc were creative projects, so anything ranging from simple design requests such as designing a banner to videos, to full-blown tenders where we would have to present a quote in lots of detail. In general, I worked on lots of creative projects and campaigns. In the creative realm, the complexity and the type of service offered changed a lot, and so did our quotes, and PandaDoc was used for them..”

Ricardo Neves

[Read full review](#) 

Senior Project Manager at a consultancy with 51-200 employees

“My main use case for PandaDoc is that it has been a game changer, especially in my organization because it saves our sales reps hours per week on documentation. We use PandaDoc to make our sales process secure, efficient, and professional. Using the entire integration with HubSpot, our sales representatives are able to create and prefill agreements quickly and send them to customers with the click of a button. We use the two-way synchronization with HubSpot to ensure our data is flowing seamlessly. We have recently started to use PandaDoc rooms to create an even more professional buying experience for our customers, and it has been incredible.

“We also use PandaDoc for sign-off on customers' contracts and to collect deposit payments, which allows us to track all quotes we have sent out and also verify customers have reviewed them and spent time on each page. It also offers a secure way for them to process payment easily..”

Kirkwood Bernice

Software Engineering Manager at MetLife

[Read full review](#) 

“PandaDoc is a game changer for our organization. We use PandaDoc to draft and submit business proposals as well as send clients our terms and conditions prior to them signing up with us as our customers. The reminder system and templatization greatly speed up the drafting and sending of these documents, and the collection of digital signatures ensures we are compliant legally. This helps us to send proposals much faster and easily keeps track of the progress and viewing of the documents by our potential clients.

“PandaDoc is a great tool for sending proposals and terms and conditions to our customers for collection of digital signatures. The ability to templatize our documents and have collaborators help finish the document is invaluable. The dashboard is a game changer as it gives us one place to view all our active documents and the status of the documents.

“Sending enrollment agreements is super easy, especially since PandaDoc works with HubSpot. Most of the time, I don't have to enter in numbers myself, so it makes for a much quicker turnaround.

“I also love being able to change the expiration date since everyone has different enrollment deadlines. The functionality is endless and could be used for a myriad of things. Since we are able to create our own templates, it opens a world of possibility..”

Christine Chelsea

Team Lead at Unilever

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Setup

The setup process involves configuring and preparing the product or service for use, which may include tasks such as installation, account creation, initial configuration, and troubleshooting any issues that may arise. Below you can find real user quotes about the setup process.

My experience with pricing, setup cost, and licensing is that the price is more competitive compared to its alternative. The setup was straightforward and easy.

Patrick Dury

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Junior Software Engineer at DXC Technology

“It is very easy to customize templates and documents in PandaDoc to fit our business needs. My experience with pricing, setup cost, and licensing is that it is a very cost-effective tool, affordable by any size of organization..”

George Peterson

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Data Analyst at a tech vendor with 10,001+ employees

“The pricing for PandaDoc is good and very comfortable, and the setup cost is not very much. As soon as we create the contract, creating it on PandaDoc is very easy, so the setup cost does not really amount to anything. I have not used PandaDoc's licensing features yet..”

Muhammad Haseeb Saleem

[Read full review](#) 

Revenue Operations at a non-profit with 11-50 employees

“I have seen a return on investment with PandaDoc, and I can share that time has been saved.

My experience with pricing, setup cost, and licensing for PandaDoc is that it is good, the setup is easy, and we can use it with ease..”

Verified user

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Devops Engineer at a tech vendor with 51-200 employees

Customer Service and Support

“I don't remember reaching out to customer support at the time, or if I did, I think it was okay. Generally, they tried to solve the issue within 24 hours or at least flagged what was going on..”

Ricardo Neves

Senior Project Manager at a consultancy with 51-200 employees

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“Regarding customer support, I have had good experiences with PandaDoc's support team, as they have been very responsive and proactive. It is one of the best customer support teams I have reached out to..”

Bitanap Marion

Business Development Manager at Nestle

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“The onboarding and training process for new users was very easy because of the support provided. The support team was readily available in case we had any issues.

“I would rate the customer support of PandaDoc an eight out of ten, as it is very great, proactive, and responsive..”

Gemam Mosik

Senior Software Engineer at Lee Hecht Harrison, LLC

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Other Advice

“PandaDoc is one of the best tools available in the market, and I believe it is the best tool available in the market. I would rate this review as a 10 out of 10..”

Muhammad Haseeb Saleem

Revenue Operations at a non-profit with 11-50 employees

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“All features are good, and I do not have much to add about them. My advice to others looking into using PandaDoc is that it is a great tool for a growing company. I would rate this product an 8 out of 10..”

Raya Durai

sales ops lead at a computer software company with 51-200 employees

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“My advice for others looking into using PandaDoc is to keep things organized because there is a folder structure, and when several people are inside your company, trying to keep that folder structure organized can be very challenging. If one person doesn't do their job, things start to get disorganized. That said, the search feature in PandaDoc helps quite a lot, and it is able to search not only by the name of the proposal but also by items included inside that proposal, which was very helpful. I would recommend looking at the competition. My overall rating for this product is 7..”

Ricardo Neves

Senior Project Manager at a consultancy with 51-200 employees

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“My advice to others looking into using PandaDoc is that it has been one of the best tools in managing documents, especially for when you want a great e-signature tool. It is great for sending proposals and terms and conditions to customers for collection of digital signatures. It really helps that you can templatize your documents and have collaborators help you finish the document for you. The dashboard is also a game changer as it gives you one place to view all your active documents and the status of the documents. You can even use this to collect payments as it seamlessly integrates with other software such as [QBO](#).

“It has been a great tool that helps us send proposals much faster and easily keeps track of progress and viewing of the documents by our potential clients while maintaining a professional look. I give this product a rating of nine out of ten..”

Kirkwood Bernice

Software Engineering Manager at MetLife

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“PandaDoc is a very cost-effective tool, easy to use, and very secure. I would give it a nine out of 10 overall rating. I choose nine out of 10 because it is very user-friendly and the fastest possible option, plus the confirmation of which document has been viewed and completed by our clients is a great plus. It is very cost-effective, easy to use, and the support has always been proactive and affordable.

“PandaDoc is deployed in my organization in a hybrid model. The cloud provider we use with our hybrid deployment is [Amazon Web Services \(AWS\)](#). PandaDoc's performance and speed are very reliable and fast.

“The onboarding process for new users in my team is very easy as PandaDoc is easy to learn, especially through the integration with HubSpot. All types of technical users can use PandaDoc. PandaDoc's reporting and analytics are good as we can track sent documents to our clients and their status easily..”

Christine Chelsea
Team Lead at Unilever

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“PandaDoc integrates seamlessly with our other business tools or software besides Zoho CRM and HubSpot. PandaDoc handles document version control and collaboration among team members perfectly. PandaDoc helps me manage workflows and approvals within my organization very fast, with no wasting of time.

“I advise others looking into using PandaDoc that it is one of the best document management tools, as it is very easy to use and very cost-effective, with support that has always been top-notch. It has really improved our quoting process and allows us to produce professional proposals to send to our clients, making it a very helpful tool. I appreciate the reminder system and templating, as templating greatly speeds up the drafting and sending of documents, and the collection of digital signatures ensures we are compliant legally. This helps us send proposals much faster and easily keep track of progress and viewing of the documents by our potential clients. I have also observed that we are able to save in our sales department one to two hours through customers saved on creating and filling out documents through the tracking document feature, and five to eight hours a week are saved on overall documentation thanks to the CRM integration.

“I rate PandaDoc nine out of ten..”

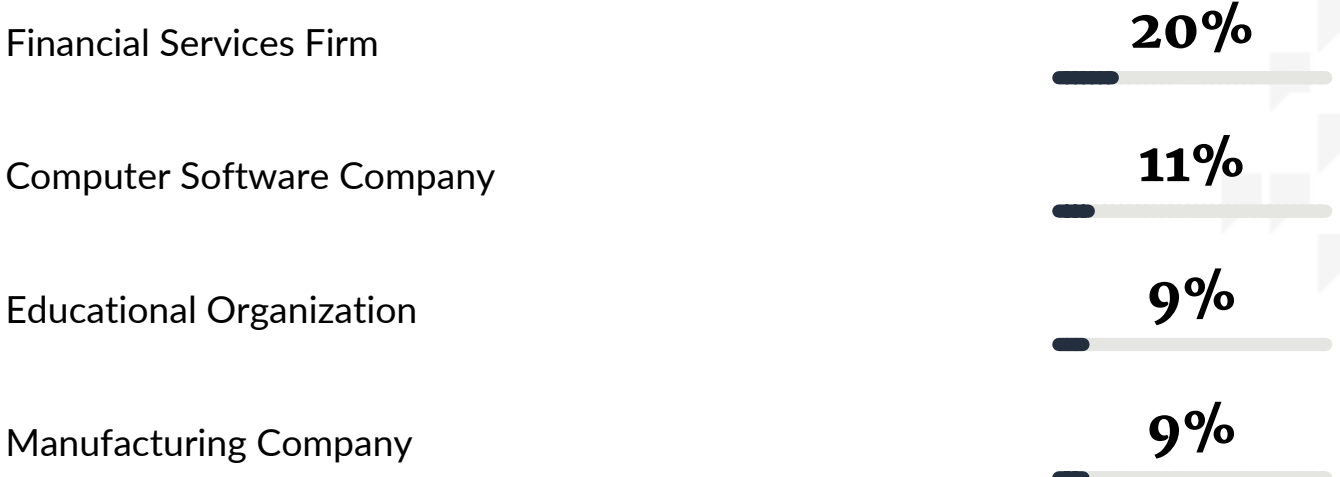
George Peterson

Data Analyst at a tech vendor with 10,001+ employees

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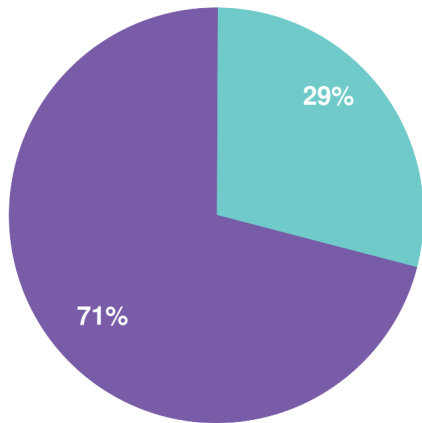
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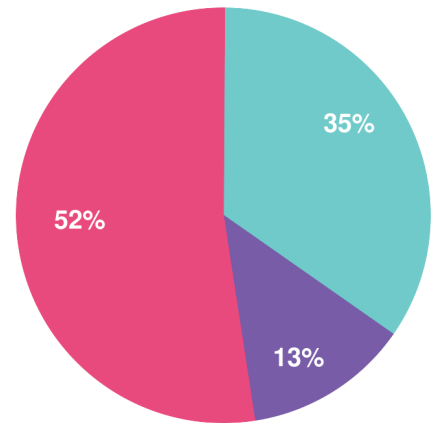


Company Size

by reviewers



by visitors reading reviews



Large Enterprise Midsize Enterprise Small Business

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