

ONBASE INTEGRATION FOR SALESFORCE



Access related documents and content directly from Salesforce



Gain a complete view of information for vendors, customers and transactions



Simplify integration within a familiar interface

Strengthen business relationships with instant access to critical documents

Salesforce is integral to managing your customer or vendor relationships, but the data is only part of the information your staff need to make informed business decisions. As a result, staff often have to search for information elsewhere — including physical files and cabinets, email inboxes or confusing network drives.

The OnBase Integration for Salesforce helps digitize your workplace with Hyland's industry-leading content management capabilities, and provides instant access to critical information alongside the corresponding Salesforce records. Users can import, retrieve and view electronic documents and content directly from their Salesforce screens. The seamless integration easily scales across departments and business processes, while checking all the necessary boxes for document security and retention.

ACCESS RELATED DOCUMENTS AND CONTENT DIRECTLY FROM SALESFORCE

With the OnBase Integration for Salesforce, documents are centrally stored on one secure digital platform, which eliminates the need to manually search through disparate systems for relevant information. Instead of spending time looking through paper files or network drives, staff can instantly surface related documents — like contracts, invoices and bills — alongside the corresponding Salesforce records with just a few clicks.

Documents can also be imported directly from the Salesforce interface without having to navigate to a separate application. By mapping information directly from Salesforce field values to keywords in OnBase, users can easily search and retrieve relevant documents from the Salesforce screen.

Providing seamless access to all documents aligned to a customer or vendor record empowers staff to make faster informed decisions and improve response times whenever issues arise. For example, when responding to a customer's query, users can easily surface related documents alongside the data and activities that are tracked with Salesforce. This enables staff to respond more quickly, improving your customer relationships and enabling excellent customer service.

GAIN A COMPLETE VIEW OF INFORMATION FOR VENDORS, CUSTOMERS AND TRANSACTIONS

Siloed information slows down business processes, especially if staff are spending time searching for relevant documents instead of focusing on value-adding tasks. With the OnBase Integration for Salesforce, content is surfaced instantly alongside corresponding records, giving users a holistic view of all information aligned to a customer or vendor relationship.





For example, enabling access to vendor contracts and requests within the Salesforce record increases employees' confidence in making informed business decisions. It also fosters trust and goodwill between you and your business partners by decreasing the time it takes for staff to respond to queries.

The OnBase Integration for Salesforce also ensures that users are working with the latest and most up-to-date information. Whether staff are accessing the documents from Salesforce, OnBase or other integrated systems like Microsoft Outlook, content is automatically updated to minimize information errors across platforms.

Automated retention options also ensure documents and content are purged when required, removing the burden from staff to ensure compliance with your organization's retention and security policies.

SIMPLIFY INTEGRATION WITHIN A FAMILIAR INTERFACE

Built-in configuration provides mapping between Salesforce data and OnBase concepts, which reduces manual indexing and eliminates custom API development costs. The integration can also be configured from within the familiar Salesforce environment, enabling you to reap the benefits without burdening IT resources.

With the OnBase Integration for Salesforce, you strengthen business relationships by providing seamless access to critical documents and data. When staff are equipped with the content they need, when they need it, they can focus on higher value tasks that drive growth — like providing excellent customer service, building relationships or closing deals — instead of searching through files for information..

Learn more at www.idt-inc.com/salesforce



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