

Document Management System Integration for Salesforce

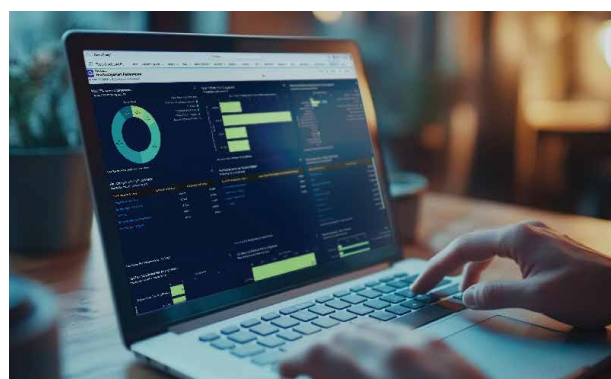
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Mitratech offers a suite of Document Management System (DMS) integrations, including connectors for Google Drive, iManage, NetDocuments, and SharePoint. Designed to enhance document management for Salesforce users, these integrations allow teams to create, view, and edit files and folders directly within familiar Salesforce records, eliminating the need to switch between platforms.

Mitratech's DMS integrations enable Salesforce users across industries to securely access and manage documents within their existing workflows. By bringing document management directly into the Salesforce interface, teams can work more efficiently while maintaining a consistent and streamlined user experience.

With documents accessible in the same place where work happens, users spend less time searching for files and reduce the risk of errors. This leads to faster document retrieval, improved productivity, and a unified environment that simplifies workflows and supports seamless collaboration.



Key Benefits of Mitratech DMS Integrations:



Effortless document management:

Eliminate platform switching and manage documents directly within your Salesforce interface.



Boosted productivity:

Reduce document retrieval times and minimize errors, freeing up valuable time for your team.



Unified collaboration:

Foster seamless collaboration on a single platform.

Note: Document capabilities may vary by connector. Google Drive integration is available in Matter Management.

Highlights

Mitratesch's integration connectors can be mapped to files and folders on your DMS site via a drag-and-drop interface or a friendly dialog.

Documents can be opened directly in the DMS, and new documents, spreadsheets, and presentations can be created from within the connectors.

For every matter, the user has an option to connect to an existing folder in the DMS, or one can be created on the go.

Mitratesch DMS integrations prioritize robust security, ensuring sensitive information is protected to the highest data protection standards and controlled by authorized access.

Integrations empower businesses to manage documents with ease, including custom workflows tailored to specific needs and industries.

Automated notifications keep teams informed and on top of crucial updates.

The Document Viewer allows users to preview a DMS document.

My Favorites allows users to view and manage a list of folders as shortcuts they frequently use.

Featured Items allow users to view a list of folders as shortcuts configured by an administrator.

Unmatched Security and Streamlined Workflows

Mitratesch DMS integrations prioritize robust security, ensuring sensitive information is protected to the highest data protection standards and controlled by authorized access. Additionally, these integrations empower businesses to manage documents with ease. This includes building custom workflows tailored to specific needs and industries, and automating notifications that keep teams informed and on top of crucial updates

Contact casecloud.inquiry@mitratech.com to learn more.



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