

Product brochure

d.velop connect for Salesforce

Centralized document management and efficient processes





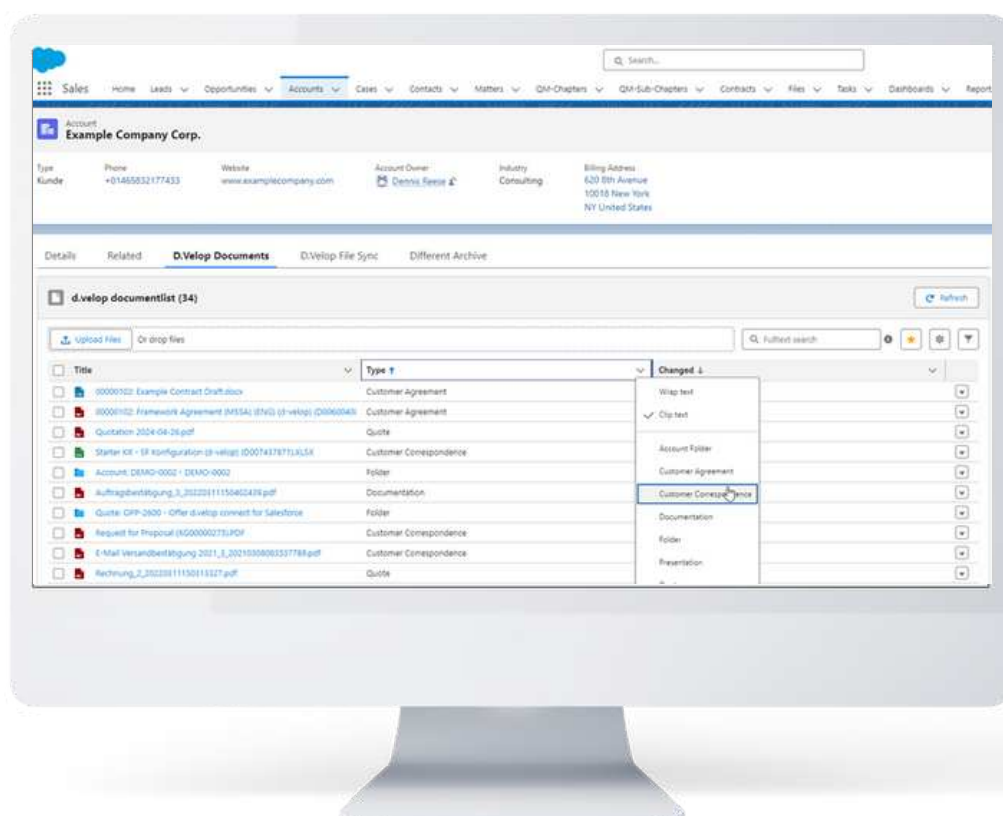
d.velop connect for Salesforce

Your option for digital document handling

d.velop connect for Salesforce manages to counteract the data silos between Salesforce and other tools and to integrate comprehensive DMS features directly into Salesforce. In addition to the many additional functionalities, the integration can save any high storage costs in Salesforce. The integration makes it possible to integrate the DMS systems d.velop documents (cloud, hybrid and on-premises), d.velop documents for Microsoft 365 and SharePoint Online into Salesforce.

d.velop connect for Salesforce provides a connector that links Salesforce and d.velop documents. This allows sales employees, for example, to access and edit documents without having to leave their familiar CRM environment.

- ✓ Break down data silos within the company
- ✓ Use DMS functions directly in Salesforce
- ✓ Save storage costs within Salesforce





Challenges

Overcome data silos, create efficiency,
fast document availability



Media disruptions

Documents can be found in many different places in the company, both digitally and in paper form. Having the right document to hand quickly is a problem.



Lack of transparency

The lack of logging of what has been done with the document and which employee has already viewed and processed it leads to a loss of information.



Audit compliance

Audit-proof archiving of documents is the central component of the GoBD. This is binding for all companies that manage tax-relevant data electronically.



Access control

It can be difficult to control access to sensitive documents and ensure that only authorized persons have access.



Collaboration

Within a procedure/process, several employees are often involved and must be able to access the same documents. If this document is only available in paper form or is not available in a central location, processing time and costs increase.



Working with different applications

Depending on the job and department in the company, each employee works with different applications to varying degrees. Efficient document handling is a major challenge here.



Costs

Non-transparent processes, media disruptions and a lack of collaboration lead to a high expenditure of time, which costs money.



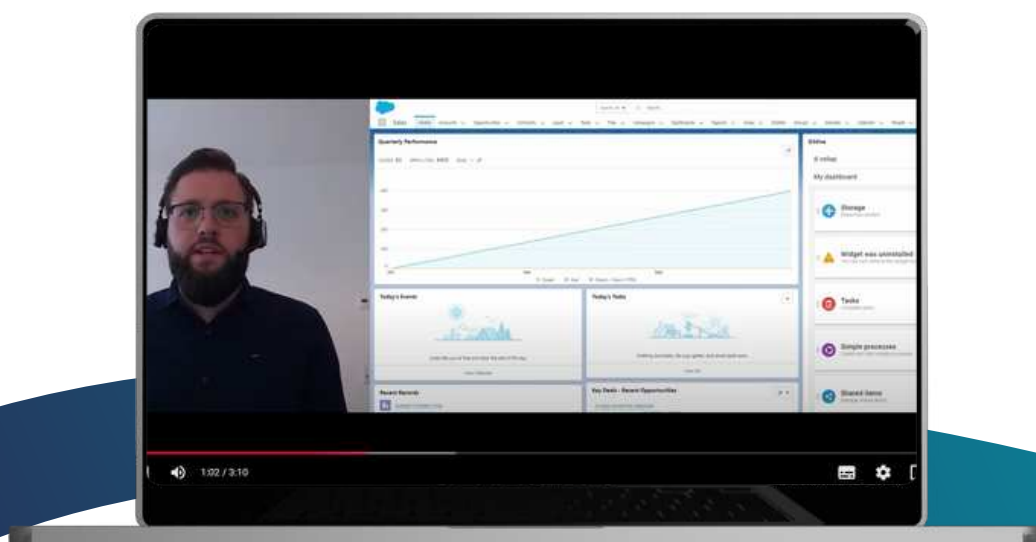
Range of functions d.velop connect for Salesforce - These highlights await you

- ✓ **Seamless integration into Salesforce interfaces**
- ✓ **A feature-rich document viewer**
- ✓ **Full-text search within Salesforce (Global Search)**
- ✓ **Use of all functions of the d.velop cloud**
- ✓ **Connection of a document with several data records**
- ✓ **Automations with Salesforce Flows**
- ✓ **Use of Salesforce reports with DMS information**
- ✓ **Office Online Integration**
- ✓ **Simple versioning of files**
- ✓ **Audit-proof storage via d.velop documents**

Seamless integration and automation: d.velop documents for Salesforce

The archive is seamlessly integrated into Salesforce and supports standard and custom objects. It offers a feature-rich document viewer and OCR full-text recognition (Global Search). In addition, all functions of the d.velop cloud, such as workflows, digital signature and files can be used. Documents can be linked to multiple data sets and administrative tasks can be automated with Salesforce Flow to reduce manual effort and ensure process consistency. Salesforce reports with DMS information can also be used.

With the Office Online integration, Office documents such as Excel, Word, etc. can be integrated into the Salesforce world, edited directly from Salesforce in the Office applications, finalized and then made available to the customer via Salesforce on-board tools. Thanks to the integrated revision security, changes to documents can always be tracked and, if necessary, an older version can be restored through the simple versioning of files.





Seamless integration of the d.velop software into your system landscape

Ensure a smooth flow of information between applications, departments and teams with stable, secure and comprehensive integrations.

Integration with CRM, ERP, financial accounting, email clients, collaboration tools and HR software ensures seamless access to documents from your application. Thanks to a wide range of connectors (500+), integration is possible according to your requirements: generic and specific interfaces, add-ins or the use of a connector platform such as Microsoft Power Automate enable a wide range of integration scenarios, from loose connections to seamless merging. The products of d.velop rely on HTTP-based interfaces according to the REST principle.

Further connection options

SAP ERP

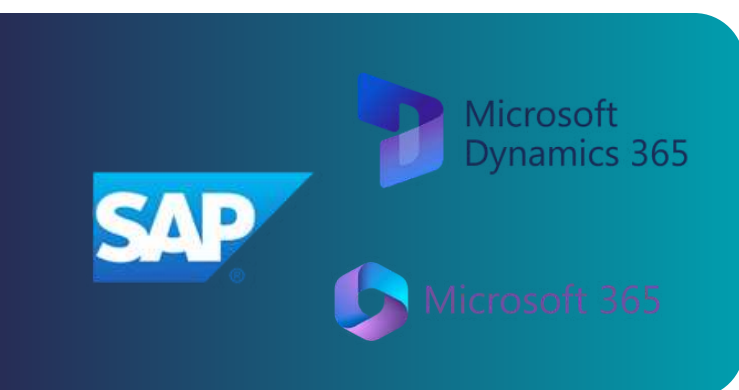
- **SAP S/4HANA:** For S/4HANA Cloud operation, we offer our customers our certified CMIS interface for archiving your documents.
- **SAP ECC (ERP):** Seamlessly connect your SAP ERP ECC 6.0 system to d.velop documents using d.velop archivelink for SAP Solutions and store all your SAP documents quickly and audit-proof in your document management system.
- **SAP Business ByDesign:** Seamlessly connect your SAP Business ByDesign with d.velop documents.
- **SAP Business One:** Optimize your incoming invoice processing with SAP Business One and d.velop invoices.

Microsoft 365

- With the integrated Microsoft Office 365 connection in d.velop documents business, you can create, edit and share Office documents directly in the DMS. This gives you a central storage location with automatic versioning for complete traceability and barrier-free working.

Microsoft Dynamics 365

- **Microsoft Dynamics 365 Business Central:** With d.velop connect for Microsoft Dynamics you integrate Business Central seamlessly into your d.velop DMS, including digital invoice processing via workflow.
- **Microsoft Dynamics 365 Finance & Operations:** Connect Finance & Operations with your d.velop DMS, whether d.velop documents, a hybrid operated d.velop documents (On Premises) or d.velop documents for Microsoft 365. Use the digital invoice processing for a comfortable processing of all invoices via digital workflow.





Important advantages at a glance

✓ Increase productivity

Documents contain business-critical information. These can now be found quickly and processes are enriched and optimized with important knowledge.

✓ Reduce costs

With d.velop documents, every customer receives a volume of free storage. This can be expanded as required. This significantly reduces storage costs in Salesforce.

✓ Fulfill obligations

Tax-relevant documents must be stored in accordance with the legal requirements. d.velop documents archives your documents in an audit-proof and GoBD-compliant manner.

✓ Empowering employees

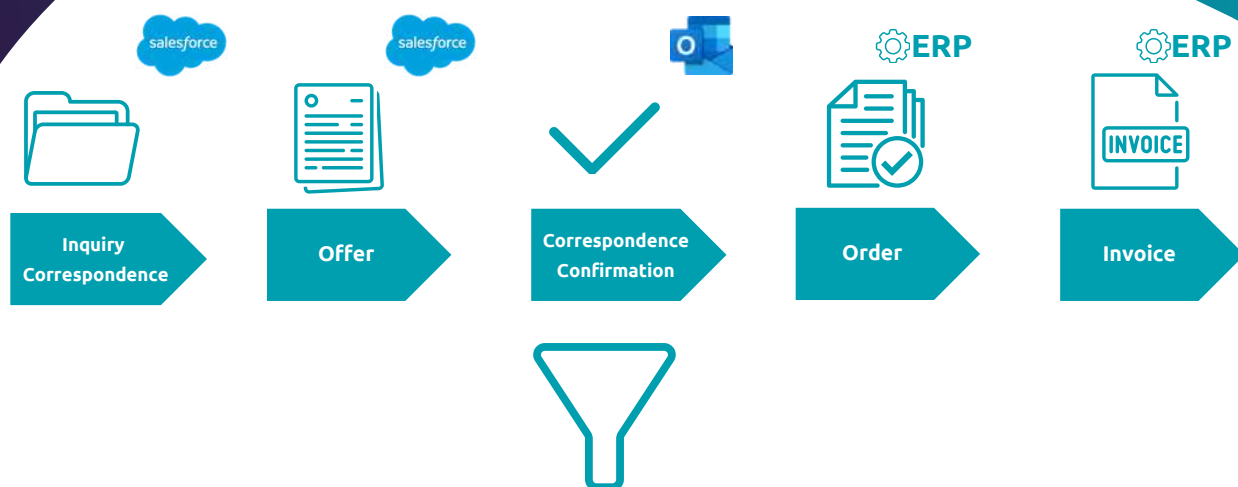
d.velop documents is seamlessly integrated into Salesforce. All functions are intuitive and easy to use. This ensures greater productivity, avoids media disruptions and keeps employees happy.

✓ Protect knowledge

One click and a document is accidentally deleted. Secure archiving ensures that important knowledge is protected and preserved.

✓ Retrieve documents

Documents are also available outside of Salesforce via the web browser so that user groups without Salesforce access have access to documents.



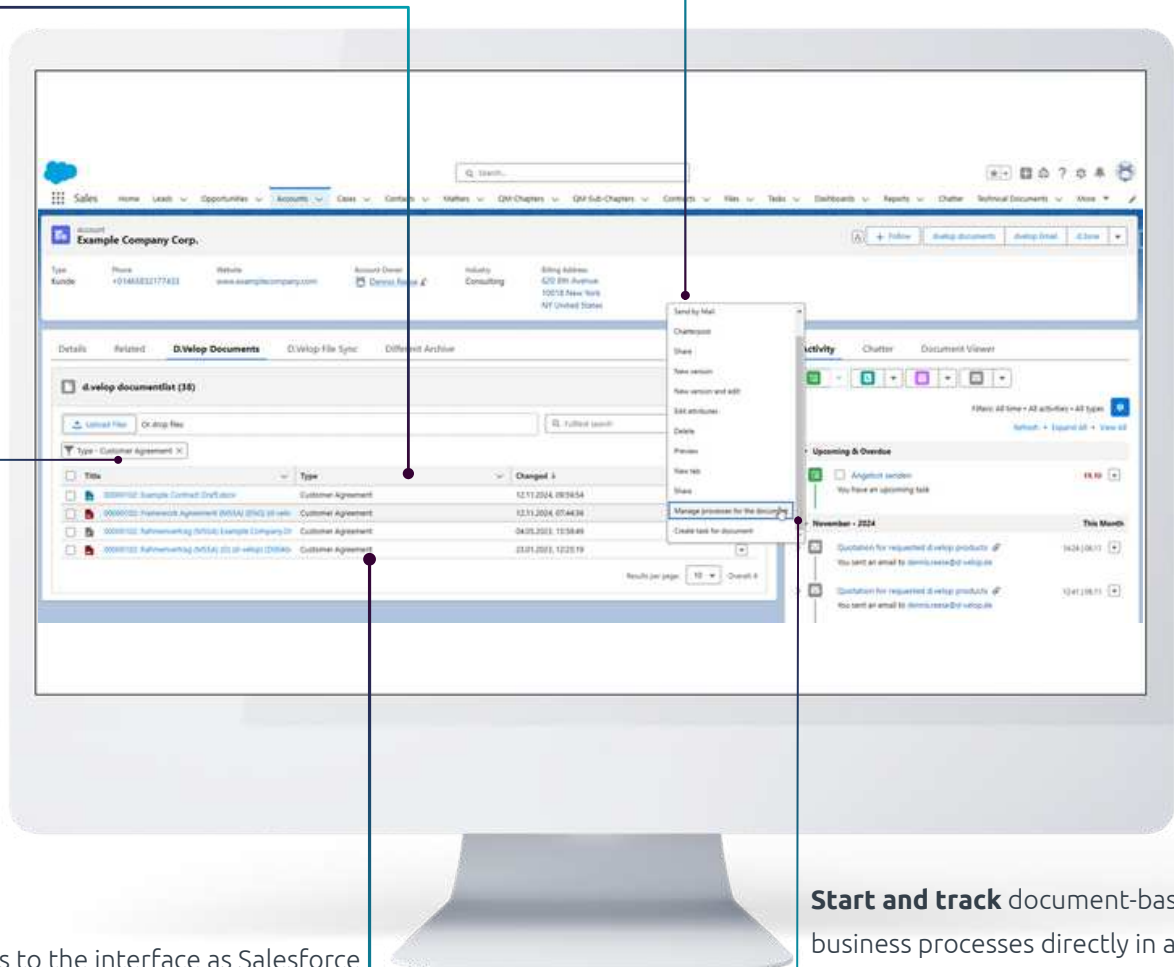


The highlights of d.velop connect for Salesforce

No more constant switching between **specialist applications**.
Direct access from Salesforce to the documents in your DMS.

Central functions of the document management system, including digital signatures, can be used 1:1 in Salesforce.

Use the DMS functions to easily filter on specific documents to quickly obtain the right information.



Thanks to the interface as Salesforce **Lightning components**, users do not have to rethink. There is no need for training.

Start and track document-based business processes directly in and from Salesforce.

TIP: Start directly with a free and non-binding test phase

Would you like to experience d.velop connect for salesforce live? Start simply and directly a test phase. We will be happy to provide you with a 30 days free of charge a d.velop cloud environment with demo connection to Salesforce free of charge!



Security & Certificates

GDPR compliance

Companies in the European Union face major challenges when it comes to legally compliant data storage.

The GoBD and the GDPR are the most striking examples of this. A DMS as a central data storage system enables companies to store documents in an audit-proof and traceable manner and thus comply with legal requirements.

In addition, the data is stored within the EU, which is not necessarily the case with storage in Salesforce or with other providers.

Certificates

d.velop AG has been an official Salesforce ISV partner since 2017 partner and the app d.velop connect for salesforce in the Salesforce AppExchange listed.

A dedicated Salesforce team with Salesforce-certified employees is constantly developing the solution within the solution within d.velop AG. Thanks to the SaaS model, you benefit directly from regular releases without time-consuming update processes.

We would also be happy to show you our solution live.
Get in touch with us!





These companies benefit from our solutions



ABLE
management
services

PARADOR

 **ter Hürne**

CANYON

 **StepStone**

 **ALTANA**



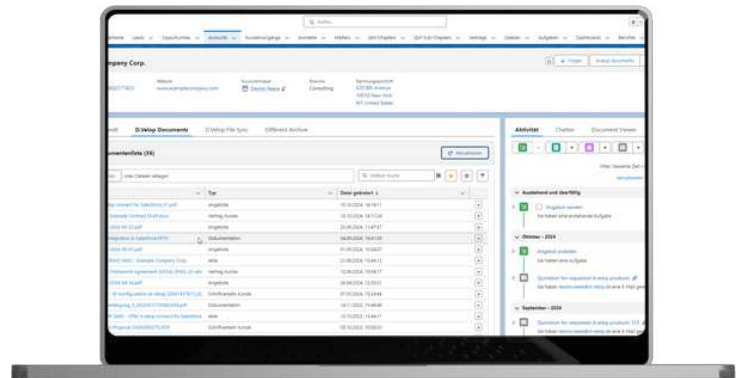
Integrate your DMS seamlessly into Salesforce

With d.velop connect for Salesforce® you connect your Salesforce environment to your powerful d.velop documents or Microsoft SharePoint and benefit from the functions of your d.velop DMS or SharePoint in Salesforce.

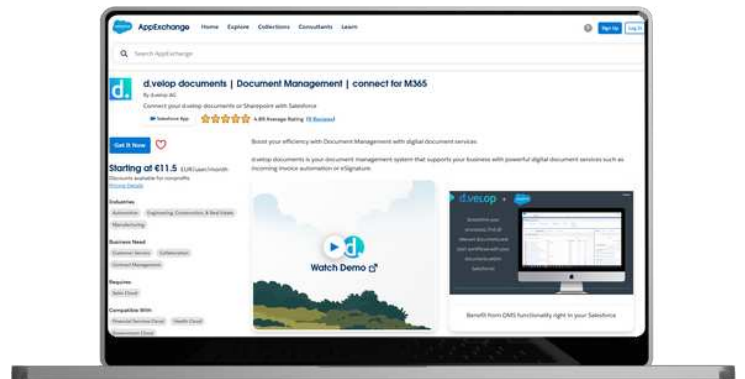
Save yourself the storage costs in Salesforce and the work in two applications. You can access the documents in your d.velop documents or Microsoft SharePoint directly from your Salesforce CRM and also store them there directly.

d.velop connect for Salesforce® can be used in the Sales, Service or Community Cloud of Salesforce regardless of the industry.

The integration is easy, everywhere and within a few hours.



d.velop store: [d.velop connect for Salesforce](#)



[Salesforce AppExchange](#)



Book an individual live demo

Are you interested? Let's talk about how you can combine Salesforce and d.velop to get even more out of both solutions.

[BOOK DEMO](#)



About d.velop AG

Founded in 1992 and headquartered in Gescher, d.velop AG develops and markets software for the end-to-end digitization of business processes and industry-specific specialist procedures and advises companies on all digitization issues. With the expansion of the established ECM portfolio for document management, archiving and workflows to include mobile apps as well as standardized and custom SaaS solutions, the software manufacturer also offers managed services. Legal security and adherence to legal requirements are guaranteed thanks to sophisticated compliance management.

d.velop provides digital services that connect people and comprehensively simplify and redesign processes and procedures. In this way, the ECM specialist helps companies and organizations to develop their full potential. A strong, international network of around 400 specialized partners: This makes d.velop Enterprise Content Services available worldwide.

d.velop products - on-premises, in the cloud or in hybrid operation - are currently used by more than 13,750 customers with over 3.7 million users across all industries; including Tupperware Germany, eismann Tiefkühl-Heimservice GmbH, Parker Hannifin GmbH, Nobilia, Schmitz Cargobull, FingerHaus GmbH, the city of Wuppertal, Basler Versicherung, DZ Bank AG, Saarland University Hospital and Greifswald University Hospital. Over 400 specialized partners, d.velop makes Enterprise Content Services available worldwide. d.velop connect for Salesforce: Centralized document management and efficient processes | All rights and changes reserved. The actual realization of the solution is company-specific and may differ from the functions described.

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