

● PRODUCT DATA SHEET

Doxis SmartBridge for Salesforce – Bidirectional Salesforce integration

Doxis SmartBridge *for Salesforce* creates a comprehensive view of customers by building a bridge between documents, workspaces and processes in Doxis and Salesforce CRM. Salesforce objects – such as Lead, Opportunity, and more – are saved along with their content in Doxis, where they trigger workflows that can be used to automate processes. With Doxis SmartBridge *for Salesforce*, even users who do not have a Salesforce login have access to all the relevant information in the business context in Doxis, including from other business systems.

Synchronize Doxis and Salesforce

We are keeping Doxis and Salesforce in sync. For example, Doxis SmartBridge *for Salesforce* automatically creates Doxis Workspaces for new Salesforce objects, such as Lead, Opportunity and more. The associated metadata in Salesforce is carried over to the Doxis Workspaces. The bidirectional exchange between Doxis and Salesforce further ensures that modifications to documents in Doxis trigger status changes in Salesforce objects.

Archive Salesforce documents and their metadata in Doxis

Doxis SmartBridge *for Salesforce* automatically archives the documents filed with Salesforce objects in Doxis along with their metadata and links them with the appropriate Doxis Workspace(s) or specific folders in the workspace(s). New versions of previously filed documents are taken into account in this process.

Access information in Doxis from the Salesforce user interface

Doxis Workspaces can be directly integrated into the Salesforce user interface. This means that users have access to all documents, linked processes and workspaces (even those that are not known in Salesforce). This makes it possible to obtain various views of customers, opportunities, etc. A specific folder can be predefined for the initial display of workspaces within Salesforce.

Access Salesforce information from Doxis

Even users who do not have a Salesforce login can access the data and documents that were transferred from Salesforce to Doxis.

360° view of projects and business partners

Salesforce users can continue to work in the comfort of their familiar Salesforce environment and access and display documents from other systems in Salesforce. Doxis SmartBridge *for Salesforce* brings together information from Salesforce, Office and specialized applications – such as emails, contracts, invoices and more – in workspaces to provide a comprehensive view of processes, projects and business partners.

Doxis SmartBridge for Salesforce

The Doxis connector for Salesforce connects Doxis to Salesforce and supports diverse use cases. The time and effort required for implementation vary by use case.

Add-on solution

Doxis Archive: Solution for archiving information from diverse sources (e.g., ERP, CRM, HR systems) for defined and undefined periods of time (primary key archive)

Doxis SmartBridge *for Salesforce* is a component of the solution suite Doxis Content Bridge for SAP and Salesforce.

Doxis SmartBridge for Salesforce – *functional scope*

Manage Salesforce content in Doxis

- Automatic assignment of Salesforce emails to Doxis Workspaces
- No limits to the folder depth when assigning Salesforce documents to workspace folders
- Delete Salesforce documents after they are archived in Doxis
- Single Sign On with SAML 2.0
- Replicate the Salesforce object structure in Doxis and set up eFile and search classes for each object type
- Link Salesforce documents to as many workspaces as needed
- Use Doxis Workspaces to create in-depth views of the Salesforce dataset

Synchronize Doxis and Salesforce

- Automatically create Doxis Workspaces for Salesforce objects
- Assign Salesforce documents to Doxis Workspaces and folders
- Automatically transfer documents filed with Salesforce objects to Doxis
- Carry over the metadata of Salesforce objects when filing in Doxis
- Synchronize document versions in Doxis and Salesforce

Interactions between Doxis & Salesforce

- Automatic status updates for Salesforce objects (e.g., Case, Campaign, Opportunity, Lead) after documents are assigned to Doxis Workspaces
- Automatically start workflows in Doxis when a new Doxis Workspace is created
- With Doxis BPM, even employees who do not use Salesforce can be included in processes
- Open and display Doxis Workspaces, processes and documents from within Salesforce
- Search for documents even without Salesforce
- Full-text search in all documents, whether they are in Salesforce or any other source