

WHITE PAPER

The path to a connected data
landscape with Salesforce

Set sail: with d.velop connect for Salesforce



Introduction

Companies thrive on their data. It is their most valuable asset and forms the basis for strategic growth and successful business decisions. The problem is that, according to a **bitkom study from 2024**, only 6 percent of German companies believe that they are fully exploiting the potential of the data available to them. 31 percent exploit it to a large extent, 42 percent to a lesser extent, and 18 percent believe that they are not exploiting its potential at all.

Everything in one place: the path to networked data

The reason for the poor rate is obvious: **corporate IT is often as complex as a nautical chart**, with the various departments acting as ports for company-wide data transfer. Instead, however, the use of specialised software **creates isolated data silos**. These data silos need to be connected to each other in order to make optimal use of the data as a whole. The better the departments are connected to each other, the better the data flow and data exchange will function.

Prevent data silos – connect data sources

The solution is a central hub for all data generated within the company. Valuable data generated by tools and platforms such as CRM systems, document management solutions or ERP applications can thus be linked together. The result: **greater transparency and agile use of information**. This is where “d.velop connect for Salesforce” comes in. The software offers **seamless DMS integration with Salesforce**. This makes it the central hub for documents and data in the company and enables direct management and use of information in Salesforce.

Making relevant information available in one place

The aim of this integration is to simplify processes and create a transparent data landscape in which all relevant information is bundled in one place and available across departments. With “d.velop connect for Salesforce”, Salesforce and other systems are linked to form a comprehensive information network that **serves as an archive and distribution platform for data and documents**. This offers companies greater efficiency and creates the conditions for a data-based corporate strategy and sustainable growth.

Data security and transparent access

This white paper will discuss the advantages that “d.velop connect for Salesforce” offers companies, how the software promotes data security and enables transparent access to company-wide information, data and documents. With “**d.velop connect for Salesforce**”, **you can bundle your company knowledge** and connect your departments. Utilise the full potential of your data.



Dennis Reese
Product Manager
d.velop AG



Challenge: Separate systems

Data silos and different applications lead to a lack of overview

Data is the most valuable asset a company can have. However, it loses value when it lies dormant in hermetically sealed systems. This is comparable to goods stored in isolated ports that never reach the market, where they could unfold their true potential.



Loss of information due to isolated information sources

Companies face the challenge that their IT infrastructures often contain isolated solutions that are used by only a few employees and whose data is withheld from the rest of the company. This is comparable to an island world that is not connected by bridges. This isolation of information sources leads to considerable efficiency losses, such as:

- **No communication between systems:**

Data in CRM systems, document management systems (DMS) and ERP applications exist side by side, but not with each other. This lack of connection makes it difficult to maintain an overview of business processes and access information in a targeted manner.

- **Duplicate work and increased costs:**

Without central coordination, the same information has to be entered or synchronised multiple times. This costs time and leads to unnecessary storage and administrative expenses – a metaphorical leak in the company's hull.



Cumbersome handling: document flow facing headwinds

Another problem is inefficient workflows in document processing. Users often lack the ability to open, edit or preview documents directly in a central platform such as Salesforce. Instead of smooth data exchange, companies struggle with cumbersome workarounds and information bottlenecks – like ships waiting for favourable currents.

Book an individual live demo

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

[BOOK DEMO](#)



Challenges in complying with compliance regulations

An additional critical factor is compliance with internal and external regulations. Without centralised data management, companies run the risk of failing to meet compliance requirements. The risk of data breaches or a lack of traceability is like a storm that can rock the corporate ship.



Data loss

A lack of backups or inadequate archiving means that necessary documents are not available for audits or legal requirements.



Lack of traceability

Lack of documentation of changes or decisions, which can become problematic in legal disputes.



Inadequate data protection

Breach of GDPR due to lack of control over personal data or unsecured access.



Incorrect versioning

Outdated or incorrect document versions are used, leading to contractual errors or misunderstandings.



Breach of retention periods

Failure to comply with statutory retention periods (e.g. 10 years in Germany for tax-related documents).



Unauthorised access

Insufficient access rights, which may lead to data protection violations.



Failure to comply with standards

Documentation and reports do not comply with regulatory requirements (e.g. ISO certifications).



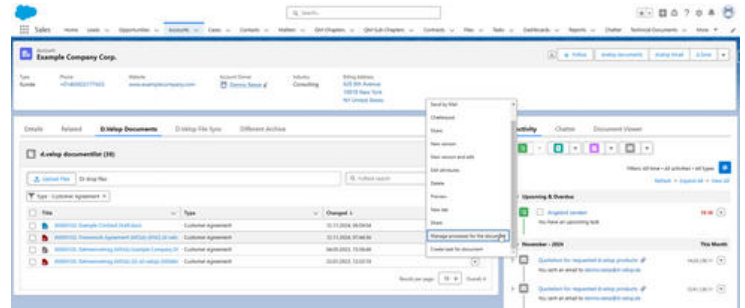
Unstructured storage

Data cannot be found, which impairs efficiency and compliance.



Solution: d.velop connect for Salesforce

d.velop connect for Salesforce is the central interface where your company departments' systems converge seamlessly. This allows you to create a data network in which all data can be used freely across departments. Like cargo ships that transport containers safely and efficiently between ports in a global network, d.velop connect ensures that your data and documents reach their destination without any detours.

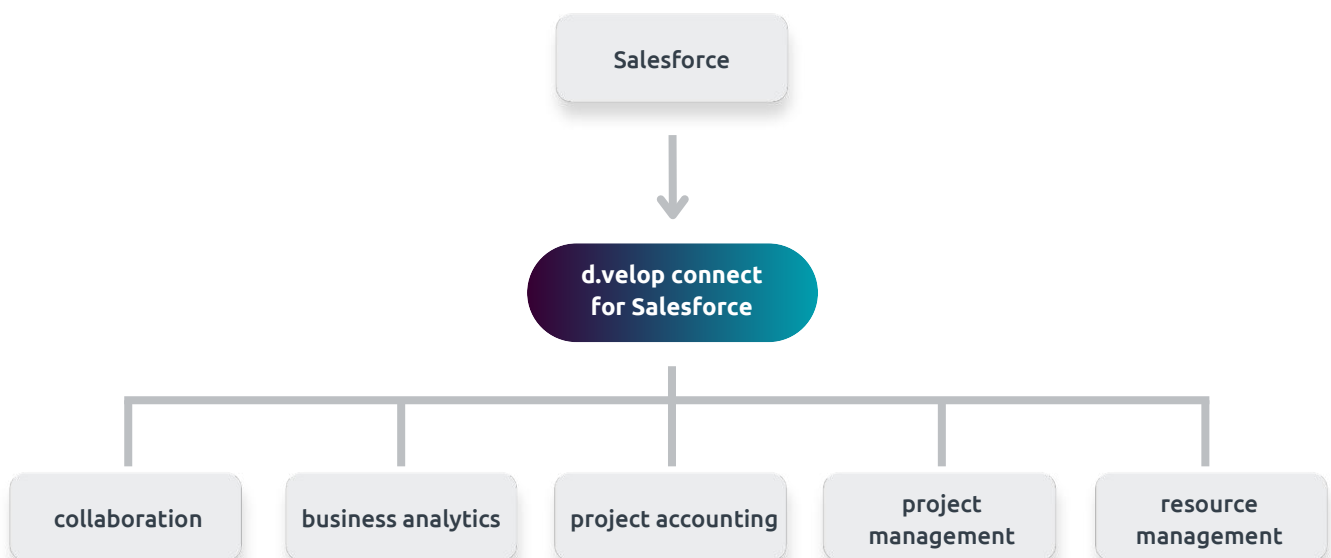


A safe haven for your data:

Salesforce integration with d.velop

d.velop connect for Salesforce acts as a reliable interface between Salesforce and d.velop documents, the central document management system (DMS), and other enterprise applications such as specialist software or ERP solutions. This integration creates a smooth data route between the systems, allowing your crew – the users – to access all relevant documents directly from Salesforce.

It will no longer be necessary to switch from one system to another, as everything remains in the familiar environment of the CRM. A particular highlight is that d.velop connect for Salesforce works as a kind of “container DMS” that stores your documents in a secure and structured manner.





Advantages of d.velop connect for Salesforce

A transshipment hub that makes the difference

With d.velop connect for Salesforce, you can create a central hub that significantly improves communication between departments, teams and IT systems. This solution brings efficiency, transparency and security to your data landscape. Documents and information flow faster, processes become leaner, and your company stays on track for strategic growth at all times.



✓ Save time with native integration of the DMS into Salesforce

Seamless integration of the document management system into Salesforce enables faster and more efficient document management – without having to switch between different systems.

✓ Easily display files

Documents can be easily viewed and edited within Salesforce without the need for additional software.

✓ Easy file storage

Files can be stored directly in Salesforce, creating a clear and organised storage structure.

✓ Cost savings by transferring files from Salesforce to the DMS

Transferring documents to the DMS saves storage costs and improves Salesforce performance.

✓ Direct connection between Salesforce, DMS and ERP systems (such as SAP/MS Dynamics 365)

The integration of Salesforce, DMS and ERP systems enables seamless exchange of data and documents between all systems, making workflows more efficient and transparent.

✓ Full-text search within Salesforce

With OCR-supported full-text search, documents can be searched quickly and specifically for relevant content.

✓ Mobile access to documents

Users can access their documents anytime, anywhere, whether in the office or on the go.

✓ Exchange documents with internal and external

You can easily share and exchange documents with internal employees and external partners.

References



The main functions of d.velop connect for Salesforce

The data in your company must be stored securely, linked intelligently and accessible at all times. With the functions and possibilities of “d.velop connect for Salesforce”, you get exactly that – tailored precisely to your requirements. With its powerful functions, “d.velop connect for Salesforce” becomes a central hub for your company data. The software ensures that your data is not only transported securely, but can also be used – anytime, anywhere:



1. Seamless integration: work in a familiar environment

With d.velop connect for Salesforce, you no longer need to leave Salesforce. The DMS functions are fully integrated into Salesforce, allowing you to remain in your familiar software environment. No system changes means less time wasted and consistently efficient working practices.



2. Document viewer: OCR-supported full-text search

Navigate quickly through your documents and files with the integrated document viewer, which offers OCR-supported full-text search. This means you can find any document in a matter of seconds.



3. Automation: the autopilot for your workflows

Integration with Salesforce Flows eliminates manual processes. Automated document workflows keep your processes on track and ensure that everything runs smoothly – from creation to archiving.



4. Versioning and audit compliance: overview of all documents

Each document is automatically versioned and archived in an audit-compliant manner. This not only allows you to keep track of every change, but also ensures that you meet all regulatory requirements – like reliable insurance against storms and severe weather.



5. Linking multiple data sets: seamlessly networked data

One document, many uses: flexibly link your files to various Salesforce data sets. This feature not only creates transparency, but also enables seamless navigation through your information landscape.



6. Office Online integration: Manage projects in a targeted manner

Edit and share Office documents directly from Salesforce. No unnecessary back and forth – everything happens in one place so you can manage your projects in a targeted manner.



7. Property-based search: quickly find your documents

Assign specific properties to documents to organise them into file structures and find them quickly.



8. Adoption of DMS authorisation concepts: Data security

The authorisation concepts of the leading DMS system are adopted and ensure that only authorised employees have access to sensitive data.



Infrastructure: global transport network for data

The infrastructure of d.velop connect for Salesforce provides you with a modern logistics platform that ensures goods – in this case, your documents and data – reach their destination smoothly. This powerful network ensures that your data is transported securely and efficiently between the various stakeholders in your company – regardless of whether it is being exchanged between departments, platforms or external partners.

Loss of information due to isolated information sources

- **Connection to leading systems:**

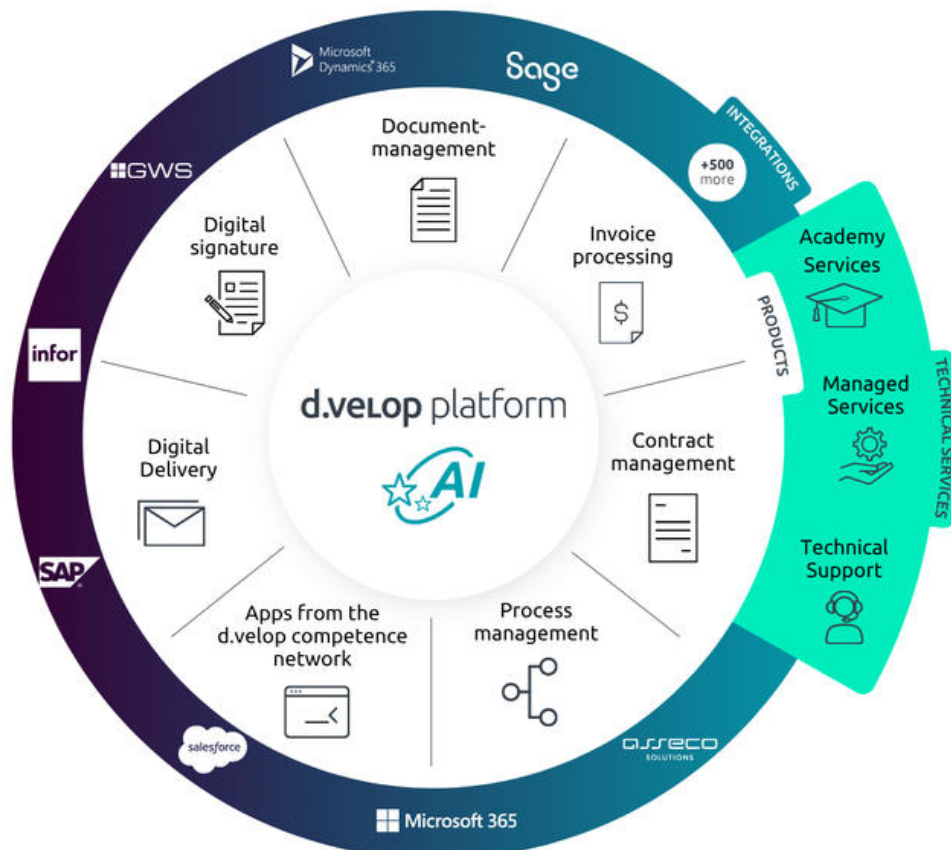
Thanks to interfaces to ERP and CRM systems such as SAP, Microsoft Dynamics 365 or Microsoft 365, your data is always available where it is needed – seamlessly and without media discontinuity.

- **Versatile integration:**

More than 500 connectors enable links to a wide range of applications, allowing you to integrate industry-specific software and common tools into your processes flexibly and efficiently.

- **Flexible interfaces:**

REST-based APIs and the use of the d.velop cloud offer maximum flexibility for integration, allowing you to customise your data flows and make them future-proof.





The security systems of d.velop connect for Salesforce

Your company data needs solid protection against risks – whether it is being transferred between departments or stored and archived in systems. With d.velop connect for Salesforce, you benefit from sophisticated security measures that protect your information like valuable cargo. The following security measures turn your data port into a central hub that not only meets legal requirements but also ensures the security and order you need for efficient and protected operations.

Legal compliance:

Rules for monitoring your data

GDPR compliance and GoBD archiving:

Your data is handled in accordance with the law and archived in an audit-proof manner. This enables you to meet all legal requirements in the EU while creating transparency and traceability, as with a precisely executed customs inspection where every movement is documented.

Flexibility and control:

Your data always in view

Web and mobile clients:

Whether in the office, working from home or on the move, you retain the same control over your data across all devices. The user interface remains consistent and intuitive, like a captain who can steer his ship from any bridge.

Trustworthy partnership:

A safety net for all weather conditions

Certified Salesforce ISV Partner:

As an officially tested and certified partner of Salesforce, “d.velop connect for Salesforce” implements the highest standards in data protection and security. This certification guarantees that your data is optimally protected both during transmission and storage – like a harbour with reinforced quays that can withstand even heavy storms.

Additional protective measures:

Stability and order

Automatic versioning and authorisation management ensure that every change remains traceable and that only authorised crew members have access to sensitive “containers”. Encryption technologies protect your data from unauthorised access and ensure that there is no risk even when transferring between different systems.



Implement d.velop connect for Salesforce?

Here's how it works

With the implementation of d.velop connect for Salesforce, you can seamlessly integrate your document management system (DMS) into Salesforce and benefit from improved document management within your Salesforce environment.

Step-by-step guide to implementation:

1. Check requirements

At the start of implementation, your company must have an **active Salesforce CRM system**. Without this basic framework, integration of d.velop connect for Salesforce is not possible. Also check the compatibility of your systems and the integrations required for a smooth connection.

2. Planning and preparation

The **needs analysis** shows which business processes will benefit from integration. Consider which departments and workflows can be improved by integrating Salesforce, DMS and ERP systems (such as SAP or MS Dynamics 365), e.g. faster access to documents and process automation. In **resource planning**, you determine who is responsible for implementation and what technical resources (servers, interfaces, employees) are required. This ensures that all necessary personnel and tools are available.

3. Licensing and procurement

Before you begin integration, you must purchase the **necessary licences** for d.velop connect for Salesforce. You should read the **terms & conditions and privacy policy** carefully to ensure that you comply with all legal requirements, particularly with regard to the GDPR. Once the licences and contracts have been clarified, you can proceed with implementation.

4. Technical integration

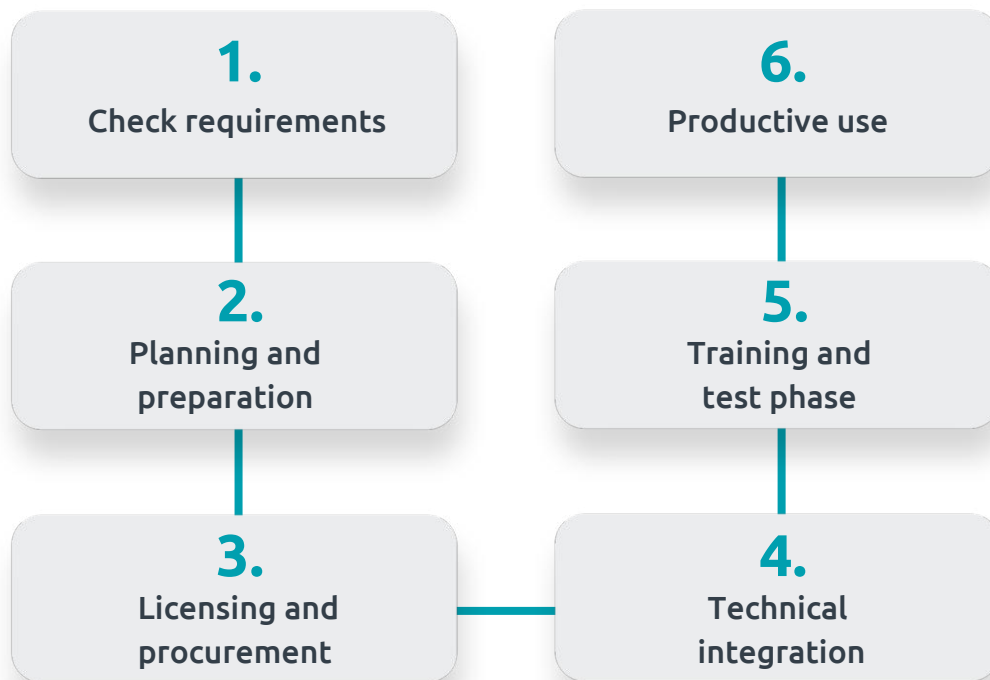
Now it's time for technical integration. Install the **"d.velop connect for Salesforce"** app from the d.velop Store and set it up according to the instructions. Configure the **connection between Salesforce and your DMS** correctly to ensure seamless data exchange. Also define **user rights** and **access permissions** so that only authorised persons can access sensitive documents and workflows are secure and efficient.

5. Training and testing phase

Train your employees in how to use the integrated solution so that they understand the new system landscape and can benefit from the improvements. During the **testing phase**, simulate realistic scenarios to check that the integration is working smoothly and that no technical problems are occurring.

6. Productive use

After successful testing, the **go-live phase follows**, during which the solution transitions into productive operation and your employees use the systems in their everyday work. Ensure that support structures are in place for technical issues so that help can be provided quickly. Well-structured follow-up support guarantees long-term success and adaptation to new requirements.



Reach your destination safely with a strong partner

d.velop connect for Salesforce offers companies a powerful solution for managing their data efficiently and securely. The **seamless integration of Salesforce** and other systems such as ERP or CRM creates a central hub for documents and information, which significantly increases efficiency and transparency within the company. Security mechanisms such as GDPR compliance and audit-proof archiving ensure the protection of company data and the smooth running of business processes.

Overall, d.velop connect for Salesforce enables a networked, efficient and secure data landscape that helps companies successfully implement their strategic goals.

Book an individual live demo

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

[BOOK DEMO](#)



9 key takeaways from d.velop connect for Salesforce



Trustworthy solution

A lack of backups or inadequate archiving means that necessary documents are not available for audits or legal requirements.



Increase in efficiency

Seamlessly integrating document management into Salesforce saves you time, simplifies your processes and increases productivity.



Cost reduction

Automated workflows, flexible interfaces and centralised data management reduce administrative effort and, in the long term, costs.



Investment in the future

Thanks to state-of-the-art technologies, flexible integrations and continuous development, the solution is designed to keep your company competitive in the long term.



Process automation

With Salesforce Flows and other automations, manual, time-consuming tasks can be integrated into workflows and automated, further increasing efficiency.



Increased transparency

By integrating documents and data into Salesforce, all departments gain a unified view of relevant information, which speeds up decision-making and improves collaboration.



Seamless integration

The solution enables fully integrated use within Salesforce without having to switch between different systems. This reduces training costs and enables rapid adoption.



Better compliance and security

The solution ensures audit-proof document management and supports compliance with legal requirements such as GDPR and GoBD, thereby minimising risks.



Extensibility and flexibility

Thanks to comprehensive integration with other ERP, CRM and DMS systems, as well as a wide range of interfaces and APIs, the solution remains adaptable to the individual needs of your company and compatible with developments in the IT industry.



Ready to set sail with d.velop connect for Salesforce?

d.velop connect for Salesforce connects your departments, integrates your systems and ensures efficient, secure and transparent document management – like a well-organised cargo ship captain who brings your valuable cargo safely to its destination. Invest in this integration and lay the foundation for modern, data-driven growth.

Come aboard and experience integration

Join our webinar or demo to see how d.velop connect for Salesforce can improve your document management. Discover how simple and efficient your processes can become with this solution, and get ready for a smooth ride into the digital future.



[Webinar](#)

[Demo](#)

Certified AI Specialist

d.velop is a certified AI specialist for generative AI and its use in Salesforce. The Salesforce AI Specialist certification is an in-depth certification in the field of generative AI and its application within Salesforce. Those who are certified are able to configure and apply the Einstein AI tools in Salesforce and communicate the features and benefits of the Einstein Trust Layer.



SALESFORCE DMS

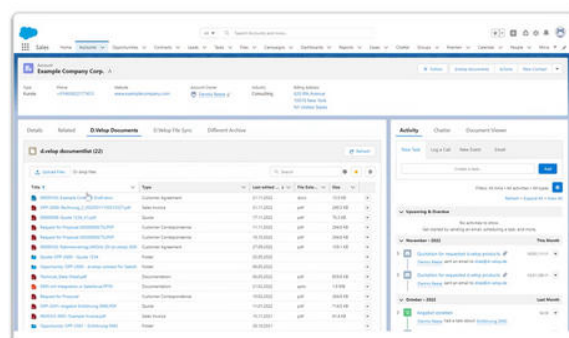
Document Management directly in Salesforce

With d.velop documents for Salesforce, you can easily manage your documents directly within Salesforce.

- ✓ Collaborate on documents beyond Salesforce
- ✓ Save time and money through collaboration and reduced storage costs
- ✓ Digital signatures can be mapped directly in Salesforce

[Watch Webinar](#)

[Request Demo](#)



[Website: d.velop Salesforce DMS](#)

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. White paper: The path to a connected data landscape with Salesforce | 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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