

Document Lifecycle Management for Salesforce



When your customers describe these pain points, that's your cue. Appiphony's suite of Salesforce-native apps covers the full document lifecycle — from file storage and document generation to data capture and e-signatures — all without heavy dev lift or expensive middleware. Use this sheet to connect the dots fast.



Drive Connect

Google Drive + Salesforce

You'll hear customers say...

-  *"We waste too much time switching between Salesforce and Google Drive tabs to find files."*
-  *"Our Google Drive is a mess. Everyone names and saves folders differently."*
-  *"We are spending too much money on Salesforce file storage."*

Drive Connect Solves this by...

- ✓ Link, view, and edit Drive files directly from any Salesforce record.
- ✓ Automate consistent Google Drive folder structures using Salesforce Flow.
- ✓ Store files in Google Drive while keeping them accessible in Salesforce.



Share Connect

SharePoint + Salesforce

You'll hear customers say...

-  *"We waste too much time switching between Salesforce and SharePoint to find files."*
-  *"Our SharePoint is a mess. Everyone names and saves folders differently."*
-  *"We are spending too much money on Salesforce file storage."*

Share Connect Solves this by...

- ✓ Link and view SharePoint files directly from any Salesforce record.
- ✓ Auto-create consistent SharePoint folder structures via Salesforce Flow.
- ✓ Store files in SharePoint while keeping them accessible in Salesforce.



Merge Connect

Document Generation for Salesforce

You'll hear customers say...

-  *"Manually drafting documents is slow and leads to data entry errors."*
-  *"We manually create the same documents over and over, and it takes up too much time."*
-  *"Our current doc gen tool is too technical. We need something more user-friendly."*

Merge Connect Solves this by...

- ✓ Generate Microsoft Files, Google Files, and PDFs from Salesforce data in seconds
- ✓ Automate document creation end-to-end with Salesforce Flow
- ✓ No-code template builder lets admins build and maintain templates themselves.

Manage, generate, sign and parse files with the all-in-one Appiphony Product Suite.



These three apps extend the core suite — covering intelligent data capture from documents, e-signature workflows, and file access for your customers' external portal users. Each is **Salesforce-native, no-code friendly, and quick to implement.**



Parse Connect

Intelligent Document Processing

You'll hear customers say...

- ☞ *"Manually entering data from files into Salesforce is slow, tedious, and error-prone."*
- ☞ *"We're stuck manually re-typing data from email attachments into Salesforce records."*
- ☞ *"Mulesoft is too expensive and complex for simple document data extraction."*

Parse Connect Solves this by...

- ✓ Extract data from PDFs, Word docs, and images directly into Salesforce records.
- ✓ Forward emails with attachments to automatically parse data into Salesforce records.
- ✓ Admin-friendly, no-code setup means no developer or complex integration required.



eSign Connect

DocuSign + Salesforce

You'll hear customers say...

- ☞ *"We send contracts via email instead of Salesforce, so we lose all visibility."*
- ☞ *"Signed contracts end up lost in email threads or local downloads, not in Salesforce."*
- ☞ *"We're paying for extra DocuSign licenses just so users can check signature statuses."*

eSign Connect Solves this by...

- ✓ Create & send DocuSign envelopes directly from any Salesforce record.
- ✓ Track all envelope & signature statuses from Salesforce record pages
- ✓ Auto-save signed contracts back to Salesforce for visibility. Works with any DocuSign plan



Experience Connect

Files for Experience Cloud Users

You'll hear customers say...

- ☞ *"I use Share Connect or Drive Connect and I want my Experience Cloud users to have access to that product."*
- ☞ *"We need to securely share Google Drive/SharePoint files with portal users."*
- ☞ *"External file uploads are driving up our Salesforce file storage costs."*

Experience Connect Solves this by...

- ✓ Extends Drive Connect or Share Connect features seamlessly into Experience Cloud.
- ✓ External users can preview and download files with native cloud authentication.
- ✓ Automatically route portal uploads to SharePoint or Drive to save Salesforce storage.