

Document Extractor

Built for the Salesforce Platform™

A Seamless, Native Solution for a
Bi-directional SharePoint Integration



What is Document Extractor?

Document Extractor is an out-of-the-box solution which transfers files from Salesforce to SharePoint and creates links to the files instead. You still retrieve the documents from where you placed them in Salesforce, but they are not physically in the CRM system anymore.

Why you should use it

Document Extractor allows you to do your job even better – by using SharePoint as storage for invoices, purchase orders, reports and other files.

This provides several important benefits:

- Improved collaboration, sharing and document management
- Substantially lowered Salesforce storage costs
- Efficient workflow with no user interface changes
- Native app, integrated into the Files component
- Salesforce performance is not affected

Why customers use Document Extractor

- Improved document management
- Possibility to share CRM documents, like contract drafts, with non-CRM users
- You can handle large volumes of documents without any Salesforce performance degradation
- Support for standard & custom objects



Why use SharePoint for storing Salesforce documents

SharePoint is built to store and manage documents, unlike Salesforce.

SharePoint storage is much cheaper than in Salesforce.

SharePoint provides the end-user with functionality that can really improve productivity.

SharePoint on-premises is an option that gives you more control over data residency when needed.

Combining SharePoint and Salesforce provides great document and team collaboration features:

- Multiple team members can collaboratively work on customer-related documents
- Documents can be shared with non-CRM users or externally (e.g. for contract changes)
- Document check-out/check-in information
- Document version history saved

What does it do?

Document Extractor automatically moves documents from Salesforce to SharePoint.

It creates structured folders in SharePoint based on the Salesforce object and document type.

Links placed to the corresponding SharePoint files are place where the Salesforce document was.

Document metadata is transferred to SharePoint, namely creator, editor, and owner.

Filenames and extensions are kept. Any duplicate filenames are handled and cause no problem.



Features

- Moved documents are still searchable with Salesforce Global. search
- Bidirectional sync is possible, including Salesforce documents' metadata
- Customizable date ranges can restrict synchronization and be used for migration of historical data in batches
- Supports Community User and Experience Cloud User access
- Possible to exclude documents from the synchronization temporarily or not
- Sync any standard or custom Salesforce object with files, notes or attachments

Supported versions

- Salesforce Professional, Enterprise, Unlimited, Developer
- Classic and Lightning Experience
- SharePoint 2013, 2016, 2019, SharePoint Online
- Office 365

Supports multiple SharePoint tenants & sites, each with its own authentication.

Benefits



Full Control over Location

Know file locations for compliance with GDPR and other privacy regulations



Maintains document integrity

All is handled using Salesforce and SharePoint API so that document integrity is kept.



Enables document collaboration

Team members can collaborate on files, see the version history and share easily through SharePoint.



Slashes Salesforce document storage costs

Move documents to SharePoint storage and get significant savings on Salesforce File Storage



Does not affect Salesforce performance

Even large volumes of documents do not cause any Salesforce performance degradation



No user interaction required

Fully automated, requiring no adjustment to workflows or user training

Add-ons



Connect from any database to Salesforce

Welcome to the CB On-prem Database to Salesforce Solution. With this add-on, you can connect to Salesforce and operate data into it **from any database or client application**. This creates a lot of opportunities for connectivity and efficient data flow between Salesforce and other on-prem or cloud databases and other software.

The add-on is built on the powerful integration platform Connect Bridge by Connecting Software. We translate the communication with Salesforce into API calls and don't interfere in the system.

Therefore, from your local database management system (DBMS) or **any database**, you can **connect to Salesforce** and operate data into it.

[Learn More](#) →



CB Blockchain Seal for SharePoint or for Salesforce

Data regulation compliance and document storage are increasingly expensive and complicated for organizations across the globe - HIPAA, SOX, GDPR, ISO, routine audits.

With CB Blockchain Seal you can verify that no one tampered with your files in the systems you use every day and know like the back of your hand: CRM (such as **Salesforce**, DMS (such as **SharePoint**), ERP or others – quickly and for a fraction of the cost.

Talk to us, and we will show you how to use the power of blockchain document sealing for your business success right now – for unbeatable price!

[Learn More](#) →



CB Salesforce Exchange Sync

Forget the old Salesforce For Outlook and move on to Lightning Outlook integrations by using a straightforward server-side solution. Synchronize or migrate Exchange data to Salesforce - messages, calendars, contacts, and more with CB Salesforce Exchange Sync.

The base for this solution is Connect Bridge (CB), the integration platform that translates the ANSI standard SQL syntax into the appropriate API calls. By having everything go through the API, you keep your Salesforce integrity secured.

By using SQL on your side, you get the ease of communicating with any target system via the standard SELECT, INSERT, UPDATE, and DELETE statements.

[Learn More](#) →



CB Document Metadata Reporting for Salesforce®

CB Document Metadata Reporting for Salesforce® is the Solution for your Salesforce reporting challenges.

If you have tried to create a report of your files in Salesforce but found the limitations annoying, you should go for the CB Document Metadata Reporting add-on.

This will make a real difference in your Salesforce reports! You will be able to create custom reports for all your files and include all metadata and custom fields you want.

[Learn More](#) →

SaaS vs Self-hosted

SaaS

USA / EU

For no-installation, plug and forget integration via our SaaS portal

No installation, no maintenance

Fast set-up and 24/7 stability

Scalable to your needs

Secure Azure-built portal



OR

[Buy on our Shop](#)

Self-Hosted

For those needing to maintain full control over the integration

Run Service on premises / own cloud

Avoid paying for extra data-traffic

Ensure data storage compliance

Optimize customer file management

[Get a Price](#)

Document Extractor Built for Salesforce Platform™

Our promise to you:

Our solution is trusted and recommended by professionals

Try First, then Decide:

- Take your free 15-day trial.
- For more info & to get your free trial please visit:



connecting-software.com

Testimonials

"When we first found Document Extractor, we thought that if it did what it said on the tin, it would tick all our boxes. And it did: just basic configuration, and it worked first time!"

Chris Lynch,
Director of Chris Lynch
IT Consulting



"Document Extractor is such a tool our salespeople didn't know they needed, and now that they have it they can't live without it"

Andrea Getty,
Senior Systems Analyst
at Dorman Products, Inc.



[Click to check reviews in Salesforce AppExchange](#)

Why Connecting Software?

Connecting Software creates integration and synchronization tools for any developer, any software and any budget. Founded in 2004, Connecting Software is an award-winning Microsoft Partner specializing in Software App Development. Connecting Software is now on the Microsoft Azure Marketplace and on AppSource. In Canada, we are listed in the Government of Canada Software Licensing Supply Arrangement (SLSA).

