

DocFynd - Introduction

What is DocFynd?

A simple click-and-configure application to link your documents to multiple Salesforce objects. The configuration rules ensure that all processes follow the same rules when a document is uploaded to any of the Salesforce objects.

How DocFynd adds value?

All businesses have multitude of documents – both physical and digital. Organizations that use Salesforce to manage their business activities have many challenges in accessing the documents within Salesforce.

When a document is attached to an object in Salesforce, it is linked only to that object. This is one of the standard features of Salesforce. But in reality, the documents need to be available for other objects as well. There is no provision of an automated process to link the documents to other objects as required. This limitation will become multi-fold for businesses that have massive number of documents under different categories.

DocFynd is an intuitive and elegant solution to overcome these challenges and can scale up with the growth of the business. DocFynd works out of a robust solution base and addresses a wide variety of real-time business cases for accessing documents in Salesforce.

Key features

Some of the key features are

- Automated linking of documents to multiple objects based on criteria
- Configure criteria to update specific fields upon document upload
- Perform specific actions based on the type of document uploaded
- Hashtag the documents for linking quicker search outputs