

# SALESFORCE INTEGRATION FOR LOGISTICS



Access **logistics**  
documents and content  
directly from  
Salesforce



Gain a complete view of  
information for vendors,  
customers and transactions



Simplify integration  
within a familiar interface

- ✓ Provides access to related documents and content directly from Salesforce
- ✓ Enables a complete view of information for sales, customer support, supply chain and 3PL vendors
- ✓ Accelerates workflow with Salesforce mobile app for task execution and to import documents directly into content repository
- ✓ Checks all the necessary boxes for document security and retention
- ✓ Seamlessly integrates and scales across multiple ERPs and 3rd party systems for a complete logistics view

## INCREASED LOGISTICS VISIBILITY DRIVES COST REDUCTION AND CUSTOMER BENEFITS

Virtually any company that deals in physical goods has a robust supply chain in place, and Salesforce is a logical place to store many outbound shipping documents related to an order. However, supply chain data is often complex, stored between the ERP, Salesforce, 3PL systems and other locations. As a result, audits of logistic processes can be complex and costly. What's more, if a customer issues arises, tracing through multiple systems and filing locations can delay a critical customer response.

The OnBase Salesforce Integration for Transportation and Logistics helps digitize your shipping documents with a seamless connection to Hyland's industry-leading content services capabilities, providing instant access to critical information alongside the corresponding Salesforce records.

Users can import, retrieve and view electronic shipping documents and content directly from their Salesforce screens. Additionally, OnBase can integrate documents from the ERP and other systems into a unified view, allowing a Salesforce user to see the documents related to the entire supply chain.

The solution is compatible with Salesforce Logistics solutions, providing a complete shipping document view from any object in Salesforce. Customer service can quickly review and share documents to resolve shipping issues, and document tracking and checklists can help identify supply chain issues in audits. It also allows workflow tasks to be managed directly in OnBase for processes that touch multiple systems.

## TRANSPORTATION AND LOGISTICS USE CASES

- Store freight invoices, bills of lading, packing slips, certificates of origin and any other logistics document type
- Manage logistics processes and audits
- Gain visibility across Salesforce, ERP, TMS and other 3rd party systems
- Customer support and issue resolution

## IMPACT

- Increases efficiencies by eliminating time-consuming searches for information across repositories
- Accelerates processes and workflow with a complete view of information
- Enhances customer support and satisfaction with faster responses and decisions
- Extends the value of existing technology investment with seamless integration to leading content services capabilities

