



Cloud Fax and Document Automation

Concord Integration with Salesforce Health Cloud

Concord Technologies' NEXTSTEP platform offers customers a web portal to view and manage incoming faxes and other image-based documents. Whether your business is in healthcare or another highly regulated industry, documents play a critical role in your operations. NEXTSTEP lets you bring those documents together and create faster, more efficient workflows that are easy to use, secure and fully auditable. NEXTSTEP is a document management solution allowing users to view, annotate, and manage documents within an "inbox" on the Concord Web Portal. From this inbox, users are able split, merge, rotate, annotate, sign, and much more, all within a customizable sub-folder structure that can be shared among other users within your organization. In addition to the document management experience, NEXTSTEP also offers the ability to automate processes with workflow rules, track additional information about documents using custom fields, perform barcode recognition, automatically classify documents by their type, and extract patient information from incoming documents.

This document describes the integration of the NEXTSTEP platform with Salesforce Health Cloud. NEXTSTEP can act as a pass-through to deliver incoming faxes directly to Salesforce with no user intervention or use its workflow engine to push the documents after a user triggers the move.

Integration Overview

Concord's NEXTSTEP product pushes incoming faxes to the Received Documents section of Salesforce Health Cloud. After authenticating via OAuth 2.0, Concord uses three API calls to facilitate the push to Salesforce:

- Content Document – This delivers the PDF of the received fax - https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_contentdocument.htm
- Received Document – This delivers additional metadata about the received fax - https://developer.salesforce.com/docs/atlas.en-us.health_cloud_object_reference.meta/health_cloud_object_reference/sforce_api_objects_receiveddocument.htm
- Content Document Link – This links the PDF to the metadata - https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_contentdocumentlink.htm

The above details are included for reference, but the integration is already built-in to NEXTSTEP and does not require any additional development work for a customer to implement. The customer would simply work with Concord's support team to enable the Salesforce integration with the particular parameters for the customer's environment.

After documents are pushed to Salesforce, they'll show within the Received Documents queue:

Received Documents						
All Received Documents						
50+ items • Sorted by Created Date • Filtered by All received documents • Updated a few seconds ago						
	Name	Active	Owner Name	Received Document ID	Created Date	
1	600960bb9a58b6a7a728618b_000001.pdf	☒	KHoda	0io8A00000000MbQAI	1/21/2021, 3:10 AM	
2	60095f1f9a58b6a7a7286170_000001.pdf	☒	KHoda	0io8A00000000MWQAY	1/21/2021, 3:03 AM	
3	_test.tif	☒		0io8A00000000MRQAY	1/20/2021, 7:10 AM	
4	6008472bbf647976af02b19c_original.tif	☒		0io8A00000000MMQAY	1/20/2021, 7:07 AM	
5	60084647bf647976af02b178_original.tif	☒		0io8A00000000MHQAY	1/20/2021, 7:06 AM	
6	6008464ebf647976af02b18a_original.tif	☒		0io8A00000000MCQAY	1/20/2021, 7:05 AM	
7	600844d5bf647976af02b166_original.tif	☒		0io8A00000000M7QAI	1/20/2021, 6:59 AM	
8	6007c4523e14167fedbdec4f_000001.pdf	☒	KHoda	0io8A00000000LIQAI	1/20/2021, 1:10 AM	
9	6007c4563e14167fedbdec95_000001.pdf	☒	KHoda	0io8A00000000LdQAI	1/20/2021, 1:08 AM	

Concord Configuration

Within Concord's NEXTSTEP Administration portal, a new data connection to Salesforce needs to be created. Authorized customer administrators can do this themselves or Concord's support team can assist.

The screenshot displays the 'NEXTSTEP ADMINISTRATION' portal interface. The main header is dark blue with the 'NEXTSTEP ADMINISTRATION' text. Below the header, there's a sidebar with various icons. The main content area is titled 'Company Settings' and has four tabs: 'Data Connection', 'Retention', 'Permissions', and 'Preferences'. The 'Data Connection' tab is active. Under this tab, there's a section titled 'Establish a data connection' with a sub-header 'Create a connection'. Below this, there are several form fields: 'Connection Type *' (a dropdown menu with 'Salesforce' selected), 'Connection Name *' (a text input field), 'Connection Description' (a text input field), 'Consumer Key*' (a text input field), 'Consumer Secret*' (a text input field), 'Choose Environment' (radio buttons for 'Production' and 'Sandbox', with 'Production' selected), and 'Salesforce Domain *' (a text input field). A note at the top of the 'Data Connection' tab states: 'Add a data connection for customers who require data integration, data integration requires an API configuration in company level settings'. A footnote indicates: '* Indicates a required field'.

After the Data Connection to Salesforce is established, a process will need to be created on the respective Workflow queues that will deliver to Salesforce. The below example shows a Default process which would deliver incoming faxes to Salesforce immediately after the fax arrives. If desired, the move to Salesforce can be triggered by a user action. This option is ideal for scenarios in which users may want to choose which faxes go to Salesforce or need to perform actions such as splitting or signing the fax before pushing. Concord's support team can assist with configuring this workflow.

The screenshot shows the 'NEXTSTEP ADMINISTRATION' interface. The main title is 'Salesforce Received Documents'. Below the title is a navigation bar with tabs: Queues, Properties, Fields, Users, Lookups, and Processes. The 'Processes' tab is selected. The main content area is titled 'Add/Edit Process' and includes a sub-header 'Create new process by adding a name, description and associates activities for this process'. A red asterisk indicates a required field. The form is divided into two main sections: 'SF' and 'Integration'. The 'SF' section contains fields for 'Process Name *' (with 'SF' entered), 'Process Description', 'Please select your default process behaviour' (with 'Inbound Fax, Uploaded Documents' selected), and 'Is this the default process?' (with 'Yes' selected). The 'Integration' section contains fields for 'Integration Type *' (with 'Salesforce' selected), 'Connection*' (with 'Salesforce Demo' selected), 'User Mapping*' (with 'User' selected), and 'Salesforce User Mapping*'. On the left side of the 'Integration' section, there is a list of activities: 'Document Conversion' and 'Integration' (which is highlighted with a blue bar and a trash icon). A '+ Activity' button is located above the list.

Getting Help

Concord's customer service team is available Monday–Friday from 6:00 AM to 6:00 PM (Pacific Time).

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