



zPaper:Transport

Digital Fax and Document Generation for Salesforce. **Simplified.**

zPaper:Transport gives customers the ability to receive, generate, and send documents within a unified Salesforce Health Cloud experience under the zPaper HITRUST CSF Certified & HIPAA Compliant platform.

All of this for an unlimited amount of users per Salesforce org.

Organizations are inundated with managing large amounts of inbound and outbound documents, between multiple sources, within a central location. Additionally, the need for separate document generation tools require additional integrations and expanded costs. These disconnected and costly processes present the risks of missed or lost documents, leakage of confidential information, and multiple manual processes.

While fax is still a common communications channel within industries such as healthcare and life sciences, the document exchange process can be digitized in order to achieve greater operational performance results, improved care coordination, and increased patient & provider satisfaction.

zPaper helps eliminate challenges within the document transfer, generation, and consolidation processes between unsupported channels by giving organizations the ability to build document templates within a simplified user experience and receive & send fax documents within a native Salesforce Health Cloud experience with **no integration work required.**

Key Features

No Integration Work Required

Get setup quickly by installing the zPaper:Transport managed package.

Secure Fax Infrastructure

Work confidently utilizing zPaper's own HITRUST Certified and HIPAA compliant fax infrastructure.

Intuitive User Interface and Salesforce Object Flexibility

Enjoy an easy-to-use solution with a simplified user interface that can be placed on any standard or custom Salesforce object.

Unlimited Users

Access is on a per org basis. This gives each licensed Salesforce user within an org access to all zPaper:Transport functionality with no additional user charges.



zPaper:Transport

Inbound and Outbound Fax Benefits

Object Flexibility

Initiate outbound documents from any standard or custom Salesforce object.

Eliminate Manual Document Routing

Ensure documents are appropriately assigned to a queue or person based on fax line or email to maintain compliance and security.

Centralized Document Retrieval

Seamlessly receive documents from fax into a centralized list view.

Leverage Received Document Record

Inbound documents are automatically attached to a Salesforce Received Document Record once received.

Reduced Processing Errors

Reduce processing errors caused by administrative mistakes or deficiencies between analog and digital systems.

Advanced Insights

Access document retrieval and delivery insights through reports and dashboards leveraging zPaper data.

Organizations also receive deeper insights into inbound and outbound fax call statuses.

Channel Scalability

Organizations can choose to use a zPaper-provided fax line or their own.

Be prepared for growing document retrieval needs with the ability to add additional channels by upgrading to zDocument360.

zPaper:Transport

Solutions Capabilities

Unified Document Retrieval in Salesforce

Automatically receive documents into Salesforce from fax and secure email.

Creation of Received Document Record

Inbound documents are associated with a Received Document Record that has been automatically created once received.

Queue/Owner Assignment

Automatically assign incoming documents to a queue or owner based on channel.

Outbound Sending

Send outbound fax documents from any standard or custom Salesforce object.

Validations

Customize zPaper:Send validations to control which documents can be selected while also having the ability to pre-populate fax destinations.

Intelligent Barcode

Automatically route and attach outbound documents to their originating record once returned utilizing zPaper's barcode feature.

Fax Performance Reporting

Access reporting around document destinations, failure reasons, send-to delivery time, and inbound/outbound call status.

Security and Governance

zPaper's platform is HIPAA compliant and HITRUST CSF Certified. Additionally, a BAA can be included by customer request.

Channel Scalability

zPaper solution upgrade paths allow organizations to add additional channels such as Salesforce Communities, web portals, sFTP, and soon HL7, FHIR, and direct messaging.

How it Works

Inbound and Outbound Fax

Receive documents from fax directly into Salesforce.

Name	Source
New 16786366035 Stack received on 2021-08-04T22:20:43.361Z	16786366035
New 16786366035 Stack received on 2021-08-04T22:11:05.436Z	16786366035
New 16786366035 Stack received on 2021-08-04T22:06:00.388Z	16786366035
18668628680-16786366035-000075675-4	16786366035
New 16786366035 Stack received on 2021-08-04T21:54:55.426Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:52:21.329Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:26:44.199Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:12:31.099Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:03:49.514Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:32:08.374Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:06:36.175Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:03:32.862Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:58:29.576Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:49:23.866Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:43:18.051Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:41:18.074Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:38:11.976Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:33:42.130Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:27:08.250Z	16786366035
New 16786366035 Stack received on 2021-08-04T21:10:18.250Z	16786366035

Service Console

Received Documents

Received Documents

Orthopedics Received Documents

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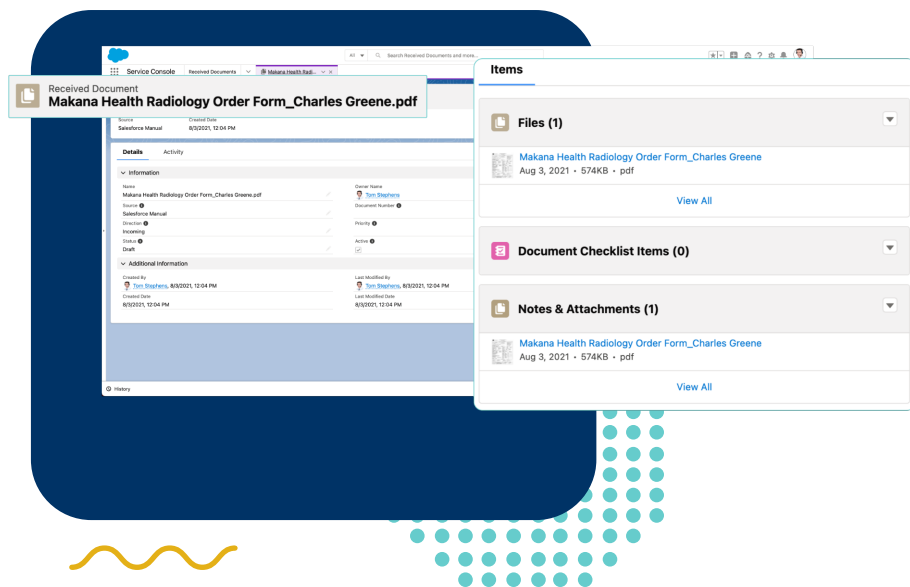
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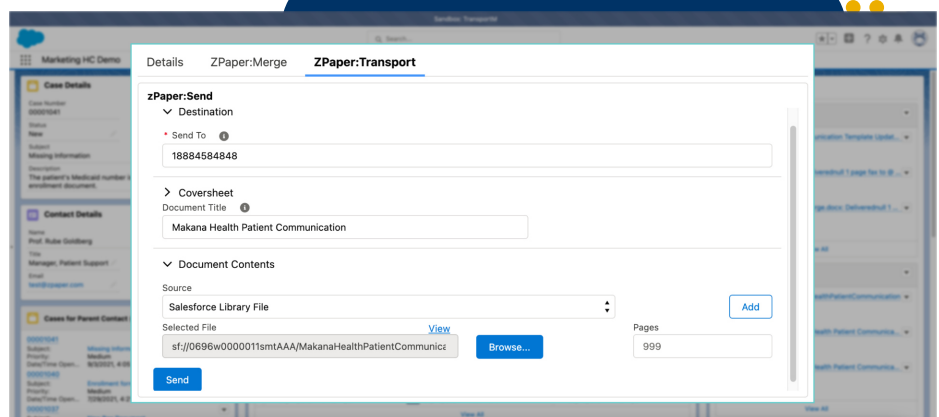
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Automatically assign incoming documents to a queue or owner based on channel.

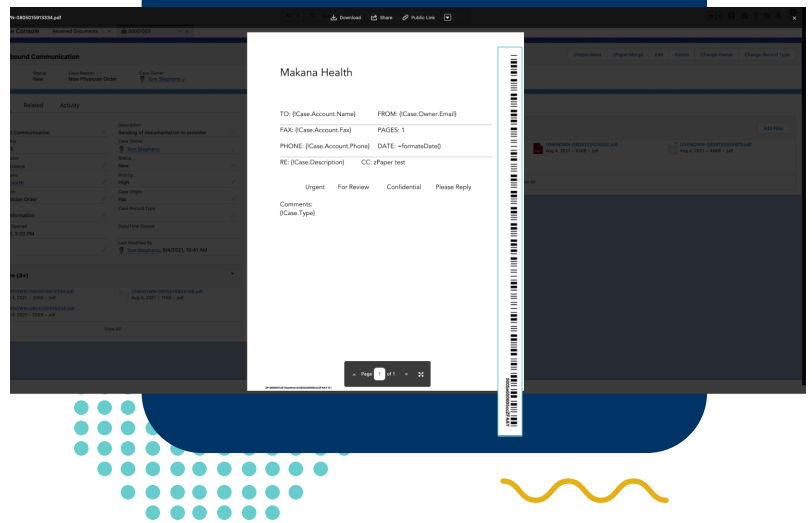


Received documents are associated to a Received Document Record that has been automatically created upon receipt.

Send outbound fax documents from any standard or custom object.



Automatically route and attach documents to their originating record once returned utilizing zPaper's barcode feature.



zPaper:Transport

Document Generation

Benefits

Object Flexibility

Easily generate a document with data from standard and custom Salesforce objects. This also includes the ability to pull FHIR data using the Salesforce Clinical Data Model.

Secure

Control document sources to maintain operational compliance and program security.

Centralized Document Retrieval

Seamlessly receive documents from fax into a centralized list view.

Solutions Capabilities

Ease of Use

Enjoy minimal configuration requirements with the utilization of DOCX documents which can be created and updated faster than interactive pdfs.

Document Source Flexibility

Templates can be stored in Salesforce for quick access and version control. Users may also download generated templates to their local hard drive if needed and/or allowed.

Rich Text Field Support

Maintain style and/or brand standards with the ability to generate documents utilizing the required font types, styles, and colors.

Note: Documents used for fax should maintain a black and white standard when possible.

Security

Ensure compliance and process standards are met with the ability to limit which file sources templates can be selected from.

File Naming

Assign specific naming to documents to ensure teams are using the right template at the right time.

Dynamic Length Fields

Document fields can flex with new pages being added when necessary to ensure all merged data is cleanly represented on the document.

Document Bundling

Users can easily create document bundles consisting of up to 10 pages from a single experience.

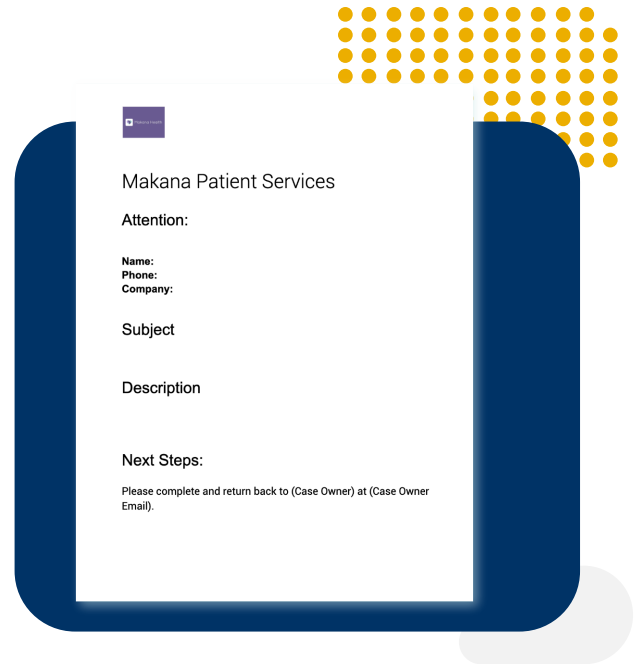
PDF Lightning File Attachment

Generated documents are attached on the originating record as a Salesforce lightning file.

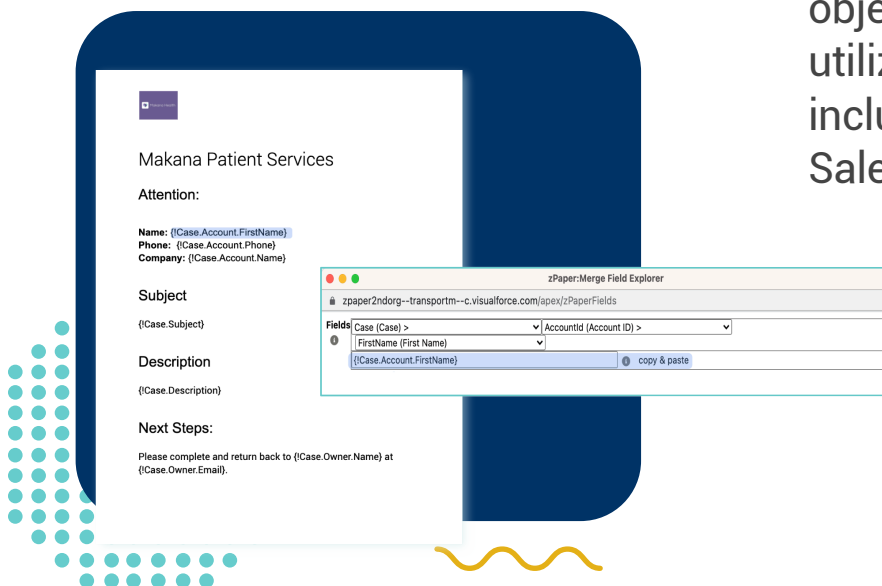
How it Works

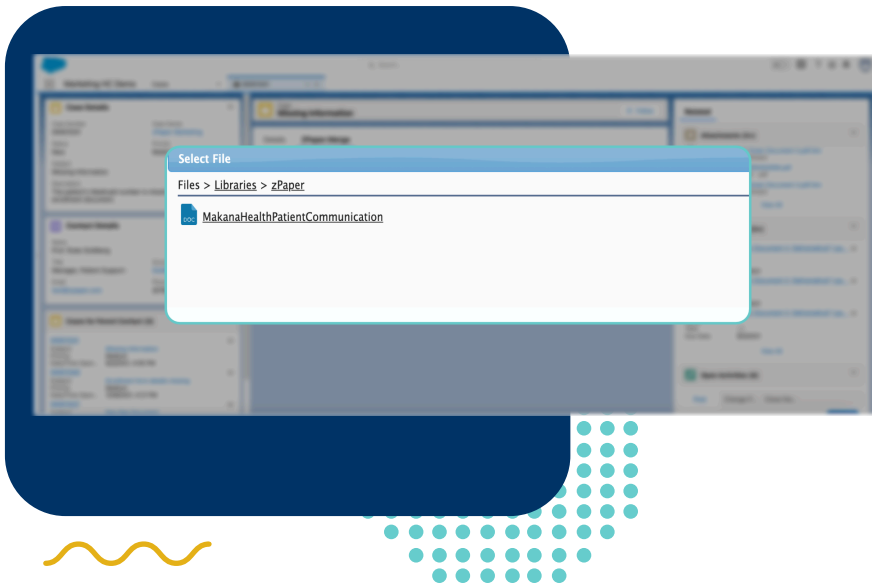
Document Generation

Create templates from any solution that allows you to save and export a document in DOCX format.



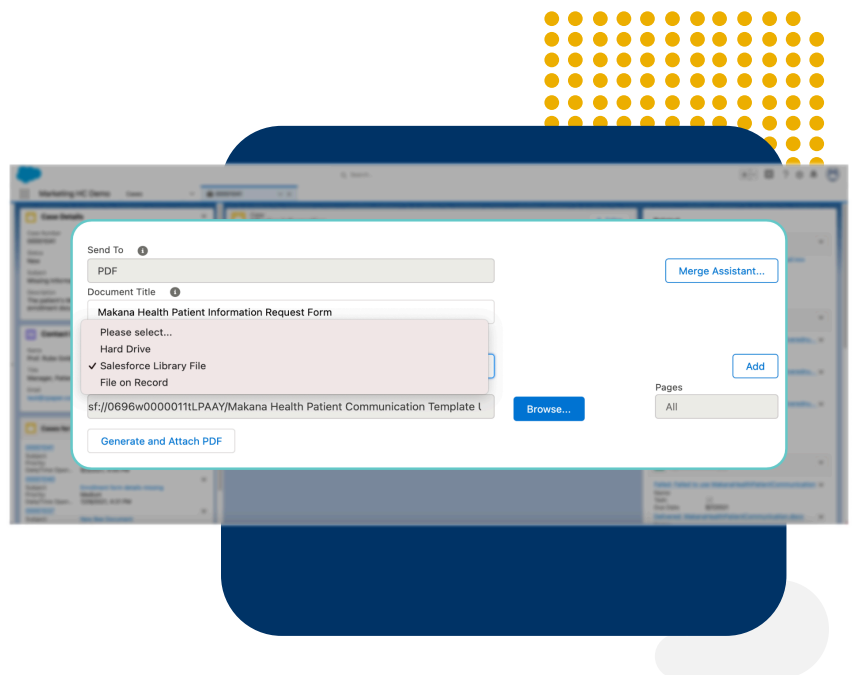
Quickly access fields across standard and custom Salesforce objects to map within your template utilizing zPaper's merge tool. This includes FHIR data using the Salesforce Clinical Data Model.



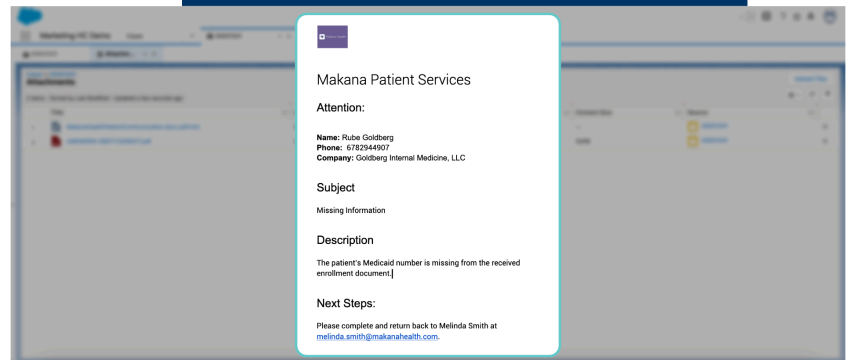


Save your DOCX template in Salesforce or a local drive.

Select and generate templates within a single Salesforce experience.



View generated documents
from within the lightning file
attachments on your
Salesforce record.



Interested in learning more?

Contact us at sales@zpaper.com or by visiting www.zpaper.com.

For additional questions,
contact us at:



Sales
sales.zpaper.com



Support
support.zpaper.com



Phone
770.643.9297