

Box for Salesforce: Financial Services

Streamline your operations with secure collaboration and content management

From client onboarding to claims management, your firm runs on content. As customer expectations for digital experiences continue to evolve and cybersecurity risks become more complex, keeping critical data secure and compliant is more important than ever. With Box for Salesforce, all of your content is available in one place with precise control over how your teams and clients access and share it, complete with intelligent threat detection, lifecycle management and governance, and effortless compliance with regulatory requirements.

Create a single source of truth

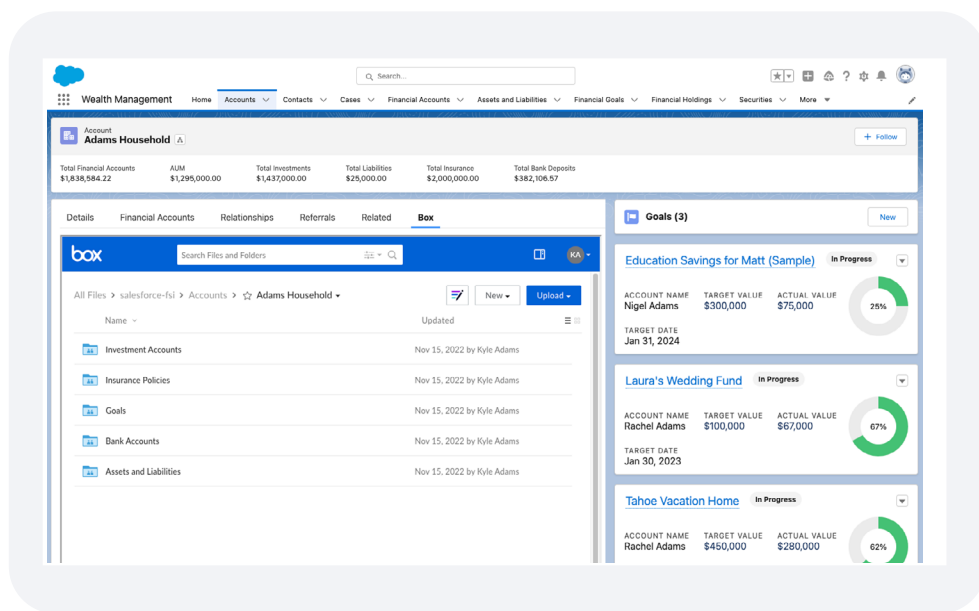
Consolidate file storage and sharing, content management, collaboration, e-signature, publishing, and workflows — all with the Salesforce security you trust.

Boost internal and external collaboration

Empower your Salesforce users to securely collaborate with colleagues and clients from any device and without file size limitation, all within your customer experience cloud.

Simplify everyday tasks in Salesforce

Streamline new account openings, insurance claim filings, client service, and more by storing all of your content where your teams are already working.



Morgan Stanley

"By investing in a cloud content management platform like Box...we have been able to create a more secure, efficient, and collaborative environment for conducting business."

Naureen Hassan, Chief Digital Officer, Morgan Stanley Wealth Management

The Power of Box for Salesforce

Box Sign

Stop paying for e-signatures by the document or user and give every Box user the ability to configure and send any document for e-signature from anywhere in Salesforce at no additional cost.

box + slack

With Box for Slack, you'll improve productivity, case resolution, and client satisfaction scores by enabling your client service team to safely and securely interact and share content.

box + zoom

Save your Zoom recordings and data straight to Box — and make them available to internal and external users — with our best-in-class security, compliance, and governance.

box + MuleSoft

Customize and integrate all of your systems quickly and securely with Box using the Anypoint Box connector from MuleSoft.

Ready to get started?
Contact us for a demo
and a FREE trial of
Box for Salesforce at
Salesforce@Box.com