

# Product Description

## d.velop connect for salesforce CRM

### 1 Overview

In addition to the "Product Description d.velop cloud platform", the product-specific functionalities of d.velop connect for Microsoft SharePoint are described herein.

The services support, availability and update of d.velop connect for Microsoft SharePoint are described in the "Service Level Agreement Cloud and SaaS".

### 2 Description

The d.velop connect for salesforce CRM is a native integration in Salesforce, which supports companies in their processes within the leading CRM system. Users can view and edit documents from the document management system directly in their familiar Salesforce environment and store documents from within Salesforce. The integration reads the Salesforce context and thus enables the display of relevant documents directly on the Salesforce object. That context also allows automated filing of documents via Salesforce Process Builder or APEX.

### 3 Modules and functionalities

The overview shows modules and functions that are currently available in d.velop connect for salesforce CRM

Name	Beschreibung
d.velop archive	The document list in which the documents are displayed.
d.velop community archive	The document list for displaying documents in the Salesforce Community.
d.velop document viewer	Direct display of documents in Page Layout
d.velop file synchronizer	This component recognizes files stored in Salesforce, displays them and transfers them to the d.3 system

### 4 Benefits

Here you will find a non-exhaustive list of advantages of d.velop connect for salesforce CRM.

- Time saving through a native integration of the document management system in Salesforce
  - Display files simply
  - Simply store files
- Cost savings by outsourcing the files from Salesforce to the DMS
- Full text search within Salesforce
- Exchange of documents with internal & external
- Mobile access to documents
- Support for the Salesforce Community
- Use DMS functionalities directly in Salesforce