

KENDOX INFOSHARE FOR SALESFORCE

The Perfect-Match: Salesforce CRM and Kendox InfoShare ECM

Salesforce is a leading enterprise customer relationship management (CRM) application in the cloud. **Kendox InfoShare** for **Salesforce** is a cloud-based solution that enables you to share documents, data and information between the two systems and make it available wherever it is needed.

Kendox InfoShare for **Salesforce** provides an intuitive, structured and compliant way to organize all your documents and information. **Kendox InfoShare** for **Salesforce** operates entirely in the cloud – just like **Salesforce**. All documents are in good hands in certified data centres in Germany.

Access to archived documents is always guaranteed via the browser-based **Kendox InfoShare Web Client**. Convenient search functions ensure that users can access relevant documents and files quickly and easily.

Detailed access authorizations additionally ensure that only authorized users have access to sensitive information and that both legal and internal data protection guidelines are reliably implemented.

IDEAL ARCHIVING OF YOUR DOCUMENTS



Benefit now from the possibilities of the Kendox InfoShare Integration for Salesforce:

- Comprehensive standard solutions for archiving your documents
- Optimal archiving of outgoing documents and attachments
- Convenient integration with transparent access to digital file solutions
- Multilingualism (German, English, French, Japanese and many more)



DIGITAL SALES AND CUSTOMER FILE FOR SALESFORCE

No more switching between applications, time-consuming document filing and tedious searches. **Kendox InfoShare Cloud Services for Salesforce** keeps you on top of things! Manage your customers in the Customer File for **Salesforce** and manage your opportunities in the Sales File for **Salesforce**. All documents - offers, invoices, credit notes, correspondence and other documents between you and your business partners - are available centrally and around the clock in the audit-proof **Kendox InfoShare DMS** (Document-Management-System).



ARCHIVING OF OUTGOING INVOICES AND SALESFORCE DOCUMENTS

Kendox InfoShare for Salesforce optimizes your document processing and storage. With **Kendox InfoShare**, outgoing invoices and other outgoing documents are archived in an automated, structured and, if required, audit-compliant manner, with all relevant contextual information (metadata). The assignment to customer or sales files is done automatically via the metadata - without manual intervention. This ensures a smooth flow of information and processing, making information and data available directly via the **Kendox InfoShare Web Client**.



ELIMINATE DOCUMENT REDUNDANCY AND OPTIMISE STORAGE SPACE

You can control where your documents are stored with Archive Services for **Salesforce**. For example, file inventories from **Salesforce** can be automatically transferred to the **Kendox Cloud Service for Salesforce** and replaced with document links in the DMS. This saves you costs for additional cloud storage and eliminates data redundancy, so you always have access to everything, regardless of where it is stored.

INTEGRATED WORKFLOW AND DEADLINE MANAGEMENT

Automated workflows can be created for digital files or documents. This makes the processes within the company much more transparent and, above all, more traceable. Whether it is document approval or follow-up. With **Kendox InfoShare for Salesforce** you can easily design your workflows and processes! Never miss a deadline again and always have an overview. Logging is included and guaranteed secure!

INTEGRATED TEMPLATE MANAGER

New documents can be created directly in **Kendox InfoShare for Salesforce** using the template manager and text modules, thanks to the **Kendox InfoShare Office Integration of the "Digital File"**. The new document is automatically assigned to the correct file, and the document is made available as a link in **Salesforce**.

RECEIPTS AND DOCUMENTS DIGITALLY SIGNED

Handwritten signatures are a thing of the past with **Kendox InfoShare's** Cloud Signature Service for DocuSign. Once the digital signature service is integrated into your processes, you can eliminate multiple printouts, manual distribution of documents and subsequent scanning. Contracts and agreements can be completed much more quickly and business can be conducted more efficiently. Other digital signature services available on request.

