

M-FILES FOR SALESFORCE

Functional Datasheet

M-Files for Salesforce allows customers to manage their business data and related documents in one common view. It connects Salesforce, SharePoint, network folders and other systems and repositories, providing easier and quicker access to data. It helps you automate document management tasks, such as approval or user and access rights management.



Get a full 360-degree view to customer-related data and documents

You can find, access and manage any document in any connected repository directly in the Salesforce user interface. You can see all documentation related to a customer in one view, combining business data with documents for more efficient customer management.



Make sure official documents align with company branding, structure and guidelines

Reduce time spend on creating official documents with agreed templates. Offer direct access to corporate templates and enforce the usage of official logos and colors in the right place. Automate filling in standard data so that all official documents follow the agreed structure and layout.



Improve flexible working opportunities

You gain access to customer-related documents in e.g. network folders while outside the office. You can save time as you have all the necessary documentation with you when you are outside the office visiting customers.



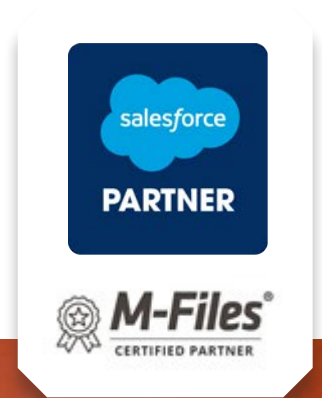
Manage all business processes in one place

Digitize document approval processes and other business processes with automated workflows. Secure timely handling and approval of customer documents by managing all your business processes in one place and manage and archive the documents automatically.

INSTALLATION

Please refer to the Installing Instructions for M-Files for Salesforce document provided when you purchased the M-Files for Salesforce.

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ABOUT SMARTBRIDGE

Smartbridge is an **M-Files** certified partner experienced in reselling, architecting and implementing M-Files for enterprises. We apply thought leadership and innovation to bring our customer's intelligent content management goals to reality. Our experience with data management, integration and enterprise applications ensures your M-Files deployment will successfully serve as a foundational component to your overall application architecture.

Smartbridge **Salesforce** certified experts are backed by decades of experience in implementing and maintaining core enterprise systems. With our deep expertise in custom application and integration development, Smartbridge is uniquely positioned to help customers with complex CRM implementations. We help our customers with the Salesforce platform from beginning to end with a full range of services such as Assessment & Health Check, Lightning Migration, Support & Maintenance, and RPA integration.

The full suite of Smartbridge services includes Digital Innovation, Systems Modernization, Applications Integration, Data & Analytics, Custom Development and Robotic Process Automation. Visit Smartbridge.com for articles, videos and podcasts to inspire your journey.



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