

M-FILES FOR SALESFORCE

Achieve a new level of transparency, control, and cost efficiency

DO YOU NEED TO :



Break down information silos & bring business data & documents together in one view?



Have better control over the lifecycle of customer-related documents such as offers?



Facilitate productivity and cost savings in the sales and service organizations?

ACHIEVE A NEW LEVEL OF TRANSPARENCY

M-Files for Salesforce shortens time to service customers, helping you serve customers better and reduce churn



Easily find, access, and manage business data and documents stored in different systems and repositories.



Integrate Salesforce content and documents from other repositories and systems into one view.



Ensure that all units have access to the same data and documents to ensure efficient customer service.



Gain access to customer documents even offline, or with a mobile device.

ACHIEVE A NEW LEVEL OF CONTROL & REDUCE BUSINESS RISK

M-Files for Salesforce supports your business processes and workflows, improving compliance with company policies and guidelines, as well as industry standards and legal requirements.

"We use Salesforce to manage all our customer interactions and we use M-Files for enterprise content management. The intelligent information management capabilities of M-Files automate for example our Opportunity management process. We use M-Files to generate proposal documents and to drive the stage of the opportunity through the editing and approval process. Once the signed agreement is received from the client and approved in M-Files, a project can be opened in Salesforce. Using Salesforce and M-Files together has allowed us to achieve significant efficiency in our operations, leading to cost savings of at least \$75,000 in Opportunity management so far."

Troy Adams: Director of Business Technology, VDA



Create contracts and other documents using the official templates and get them approved with workflows.



Enforce processes and ways of working across the organization with automated workflows.



Identify business-critical data from clutter and manage it properly.



Ensure documents are available to the right people and the right people only.



Avoid accidental leaks of confidential information.

ACHIEVE COST SAVINGS

M-Files for Salesforce lets you tap into the investment you have made in existing infrastructure, whether in the cloud, or on premises. And, by saving employees' time, it helps you reduce costs.



Maximize your investment on existing platforms.



Connect Salesforce with other cloud systems or on-premises document repositories.



Allow your employees to focus on value adding tasks and automate routine document management.



Spend less time searching for documents.

M-FILES FOR SALESFORCE IS AVAILABLE FOR M-FILES ONLINE CUSTOMERS



Run it in the cloud or on premises, with the same license.



Keep your system always up to date with monthly automatic updates.

Explore how M-Files has supported information management in companies all over the globe at **M-Files.com**



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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