apryse

Enhancing Document Management

in Salesforce with Apryse

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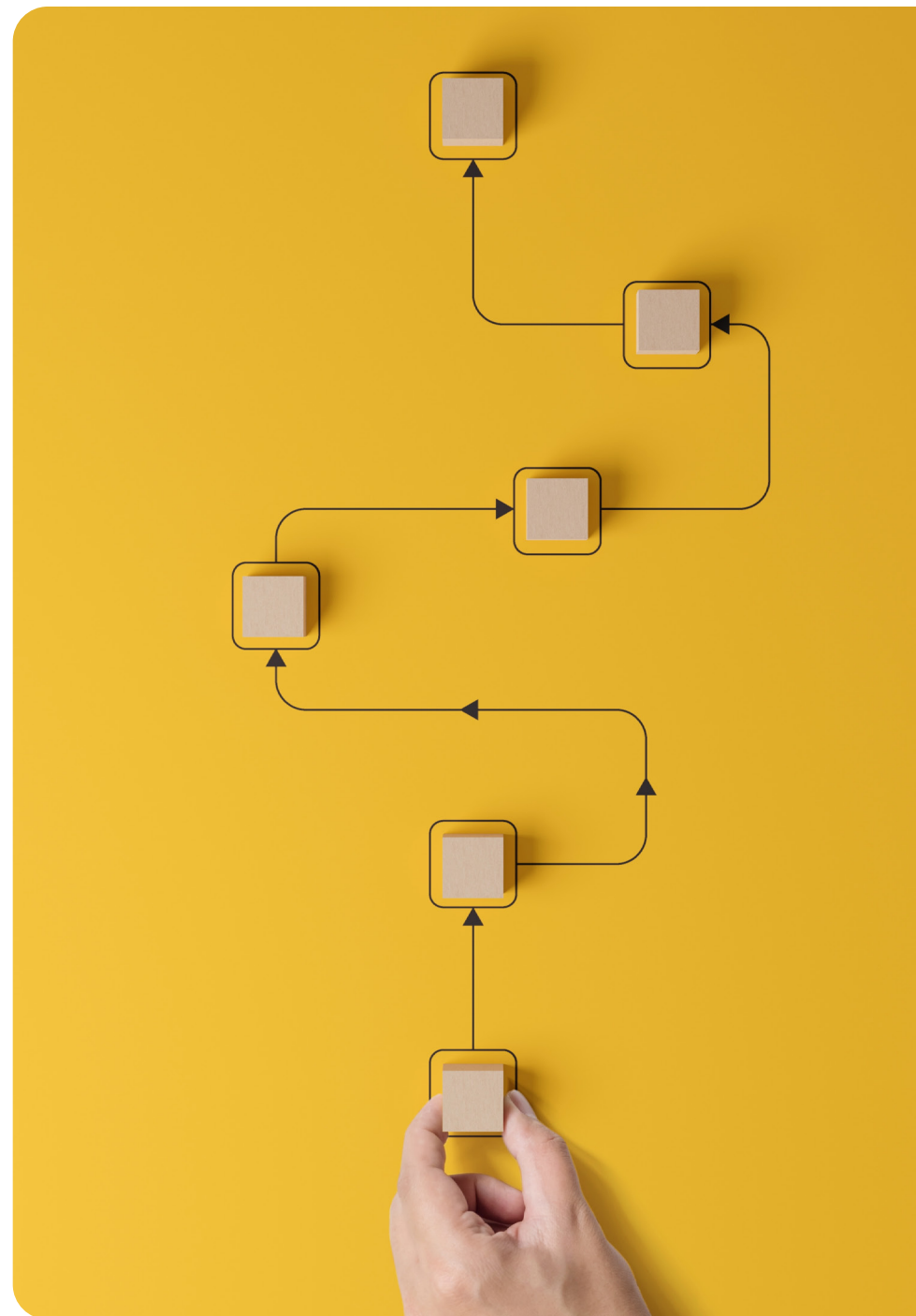
Integration Branch

Feature Branch

Commit

Continuous Integration (CI)

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Defining Document Management in Salesforce

You'll read the term a lot throughout this guide, so what exactly are we referring to when we say document management in Salesforce?

Document management in Salesforce involves automating the creation, management, and handling of documents within the Salesforce platform. This means generating reports, contracts, invoices, and other documents using your Salesforce data.

The goal is to streamline your business processes, reduce manual effort, and improve accuracy and efficiency.

Here are some common actions and tasks that fall under the umbrella of

DOCUMENT PROCESSING IN SALESFORCE:

DOCUMENT GENERATION:

Automatically creating documents like quotes, contracts, proposals, and invoices using Salesforce data.

DOCUMENT MANAGEMENT:

Storing, organizing, and accessing documents within Salesforce. This can include linking documents to relevant Salesforce records (like accounts, contacts, opportunities), version control, and ensuring documents are easily retrievable.

E-SIGNATURES:

Integrating electronic signature solutions to streamline the signing process and enable users to send, sign, and manage electronic agreements.

DOCUMENT AUTOMATION:

Automating workflows related to document handling. This can involve triggers and process automation to generate documents at specific stages in a sales cycle or business process, send notifications, and update records based on document status.

COMPLIANCE AND SECURITY:

Ensuring that documents are stored securely and in compliance with industry regulations. Salesforce offers features to manage access control, encryption, and audit trails to ensure document security and compliance.

DATA EXTRACTION AND ANALYSIS:

Extracting data from documents and storing it in Salesforce. This can be particularly useful for processing forms, surveys, or any incoming documents that need data to be captured and analyzed.

Why is document management in Salesforce so important?

Companies rely heavily on documents to drive their operations. From contracts and invoices to reports and proposals, documents are the backbone of business communication and record-keeping. With the shift towards digital transformation, the emphasis on digital documents has grown significantly. Digital documents not only enhance accessibility and storage but also streamline workflows and improve collaboration.

This reliance on digital documents underscores the importance of efficient document processing within business systems like Salesforce.

Why strong document management in Salesforce is crucial for business operations:

Efficiency and Productivity:
Automating document creation and management saves time and reduces manual effort. This allows your team to focus on more strategic tasks rather than getting bogged down by repetitive administrative work.

Accuracy and Consistency:
Automated document processing ensures that documents are generated with consistent formatting and accurate data. This reduces the risk of errors that can occur with manual data entry, improving the overall quality of your documents.

Streamlined Workflows:
Integrating document processing into your Salesforce workflows ensures that documents are created, distributed, and stored seamlessly as part of your existing processes. This helps in maintaining a smooth and uninterrupted flow of operations.

Improved Customer Experience:
Timely and accurate document handling can enhance the customer experience. Whether it's sending out invoices, contracts, or personalized reports, efficient document processing ensures that your customers receive the right information at the right time.

Compliance and Security:
Salesforce provides robust security and compliance features, ensuring that sensitive documents are handled securely. Automated document processing helps maintain compliance with industry regulations by ensuring proper document tracking, storage, and access controls.

Application Consolidation:
By integrating document management capabilities directly into your Salesforce instance, you reduce the number of separate applications you need to manage and pay for. This streamlines your operations, lowers costs, and simplifies your technology stack.

Cost Savings:
Reducing the need for manual intervention in document processing can lead to significant cost savings. This includes savings on labor costs and reducing the need for physical storage space for paper documents.

Better Data Management:
Automated document processing allows for better organization and management of documents. Documents can be easily linked to relevant Salesforce records, making it simple to retrieve and reference them when needed.

Enhanced Collaboration:
With documents stored and managed within Salesforce, team members can easily collaborate and share information. This leads to better communication and coordination across departments.

By leveraging document processing in Salesforce, businesses can achieve greater operational efficiency, accuracy, and security, ultimately driving better business outcomes.

What is preventing better document management in Salesforce?

While Salesforce offers capabilities for document management, businesses often face several challenges in maximizing its potential. Efficiently managing documents within Salesforce is critical for smooth operations, but certain obstacles can hinder this process.

Limited Marketplace Offerings:
Existing document management solutions on the market do not fully meet user expectations. They often lack seamless integration with Salesforce, fail to provide a user-friendly experience, and fall short of delivering advanced features such as real-time collaboration, comprehensive security measures, and efficient document retrieval. These shortcomings lead to inefficiencies, increased costs, and frustration among users who need a robust, integrated solution to handle their document management needs effectively.

Data Security and Compliance:
Ensuring that document management practices comply with data security regulations and industry standards can be challenging, especially when handling sensitive information.

Scalability:
As organizations grow, the volume of documents increases, which can strain the document management system if it's not designed to scale effectively.

User Adoption:
Encouraging users to adopt and consistently use new document management features or tools within Salesforce can be difficult, especially if the new system significantly changes existing workflows.

Search and Retrieval:
Efficiently searching and retrieving documents from a large repository can be challenging, particularly if metadata and tagging are not consistently applied.

Version Control:
Managing multiple versions of documents and ensuring users are working with the most up-to-date version can be a significant challenge.

Storage Limitations:
Salesforce has storage limits that can be quickly reached with large volumes of documents, necessitating additional costs for extra storage or external storage solutions.

Automation Limitations:
While Salesforce offers automation capabilities, there may be limitations in customizing these to meet specific document management needs without additional tools or development.

Cost:
Implementing and maintaining robust document management solutions can be expensive, particularly when adding third-party integrations or additional storage.

User Training:
Ensuring that all users are adequately trained on new document management systems and features can be resource-intensive and time-consuming.

Better Document Management in Salesforce with the Apryse SDK

As businesses seek effective solutions to overcome the challenges of document management in Salesforce, WebViewer by Apryse stands out as a powerful tool designed to enable organizations to streamline and enhance this critical aspect of business operations.

WebViewer is a client-side JavaScript document viewer and editor that integrates seamlessly with Salesforce.

It enables users to view, annotate, and edit documents directly within the Salesforce platform without the need for external applications. This tool supports a wide range of document formats, including PDFs, Microsoft Office files, and images, making it a comprehensive solution for all your document management needs.

With WebViewer, users experience:

Seamless Integration:
WebViewer integrates effortlessly with Salesforce, allowing users to manage documents within the familiar Salesforce environment, thereby reducing the complexity of using multiple tools.

Instant Document Rendering:
WebViewer by Apryse eliminates long wait times for document previews by providing instant document rendering. Unlike traditional methods that can take minutes to hours and only produce non-interactive images, WebViewer allows users to immediately view, highlight, search, and zoom in on documents. This significantly improves user experience and operational efficiency, reducing the burden on server resources and enhancing productivity.

Avoid File Size Limitations:
Apryse WebViewer supports external file storage up to 2 GB from providers such as AWS, GCP, Azure, Dropbox, and others.

Enhanced Collaboration:
With WebViewer, users can easily collaborate on documents in real-time. Features like annotations and comments enable effective communication and collaboration among team members.

Improved Efficiency:
By enabling document viewing, editing, and annotation directly within Salesforce, WebViewer eliminates the need to switch between applications, streamlining workflows and boosting productivity.
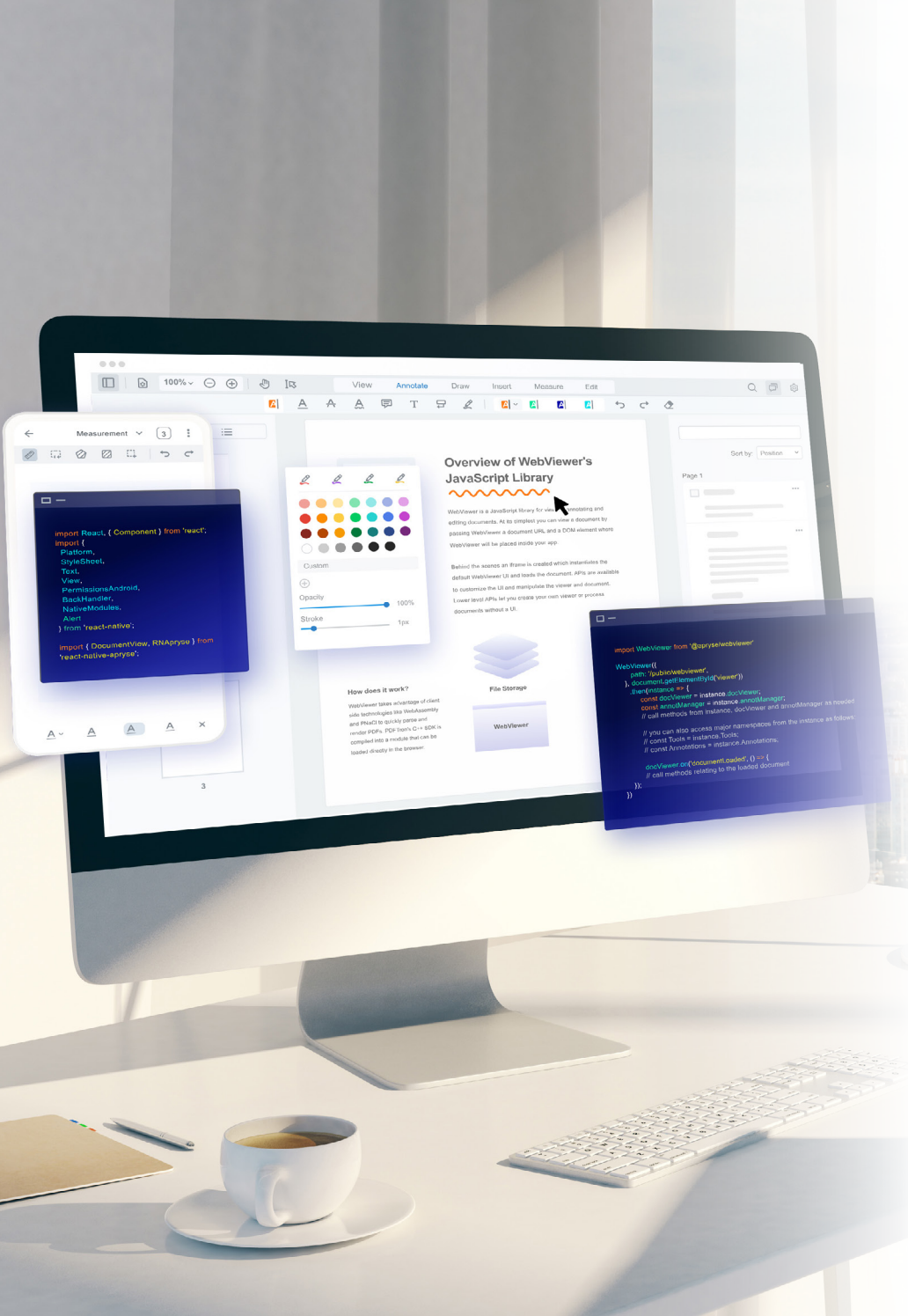
Robust Security:
WebViewer ensures that document handling is secure and compliant with industry standards, protecting sensitive information and maintaining data integrity.

Scalability:
Designed to handle large volumes of documents, WebViewer scales effortlessly with your business, ensuring that your document management processes remain efficient as your organization grows.

Cost-Savings:
By consolidating document management capabilities within Salesforce, WebViewer reduces the need for additional software solutions, leading to cost savings.

Transforming Document Management with Apryse WebViewer:

Solutions for Every Use Case

01

Case Management

Medical

Healthcare providers manage patient records, medical histories, and treatment plans. Efficient document management is essential for providing quality care and ensuring patient confidentiality.

WebViewer enhances medical document management by supporting HIPAA-compliant secure document handling.

Healthcare professionals can view and annotate patient records within Salesforce, facilitating quick access to critical information. The ability to handle various document formats, such as medical imaging and PDFs, ensures comprehensive patient care documentation.

Legal Document Management

Legal professionals need to manage vast amounts of documents, including case files, contracts, and evidence. Effective document management is critical for ensuring timely access to information and maintaining compliance with legal standards.

WebViewer streamlines legal document management by allowing users to view, annotate, and edit documents directly within Salesforce.

Features like redaction, digital signatures, and secure sharing ensure that sensitive information is protected and legal standards are met. Collaboration tools enable team members to work together efficiently on case files, reducing delays and improving case outcomes.

Government

Government agencies manage a wide range of documents, from citizen records to regulatory documents. Efficient document management ensures transparency, compliance, and efficient service delivery.

WebViewer facilitates government document management by providing tools for secure viewing, annotation, and editing of documents within Salesforce.

Features like digital signatures and audit trails ensure compliance with regulatory requirements. The ability to handle large volumes of documents efficiently supports the scalability needs of government agencies.

Insurance

Insurance companies handle claims, policy documents, and customer information. Efficient document management is crucial for processing claims quickly and maintaining customer satisfaction.

WebViewer enables insurance professionals to view, annotate, and edit claims documents directly in Salesforce.

Features like form recognition and automated data extraction speed up the claims processing workflow. Secure sharing and collaboration tools improve communication between teams, ensuring timely resolution of claims and better customer service.

Transforming Document Management with Apryse WebViewer:

Solutions for Every Use Case

02

FOAI Requests

FOIA Requests

Freedom of Information Act (FOIA) requests require government agencies to provide access to public records promptly. Efficient document management is essential for handling these requests accurately and within legal timeframes.

WebViewer supports the efficient processing of FOIA requests by enabling quick and secure access to relevant documents within Salesforce.

Redaction features ensure that sensitive information is protected before documents are released. The ability to search and retrieve documents quickly helps agencies respond to requests in a timely manner, ensuring compliance with FOIA regulations.

Transforming Document Management with Apryse WebViewer:

Solutions for Every Use Case

03

Contract Management

Contract Management

Managing contracts involves creating, reviewing, negotiating, and finalizing agreements. Efficient document management ensures that contract workflows are streamlined and compliance is maintained.

WebViewer enhances contract management by allowing users to view, annotate, and edit contracts directly in Salesforce.

Features like digital signatures, version control, and secure sharing streamline the contract approval process. Automated workflows and notifications ensure that contract milestones are met, reducing delays and improving overall efficiency.
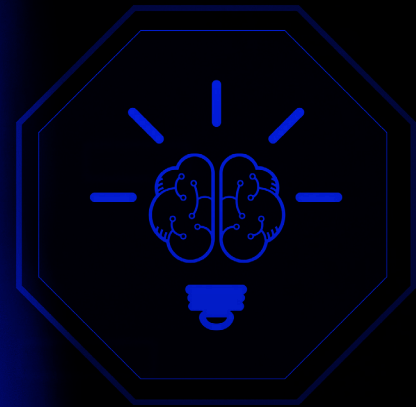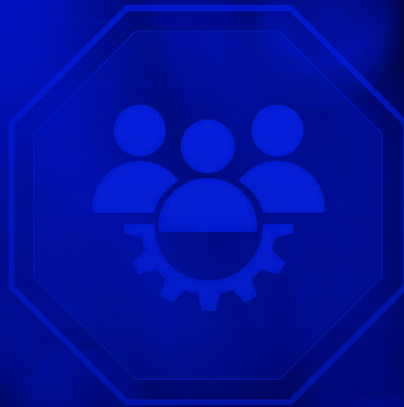
Transforming Document Management with Apryse WebViewer:

Solutions for Every Use Case

ONBOARDING

04

Onboarding

Onboarding

Employee onboarding involves managing various documents, including employment contracts, tax forms, and training materials. Efficient document management ensures a smooth onboarding experience for new hires.

WebViewer simplifies the onboarding process by enabling HR teams to view, annotate, and edit onboarding documents within Salesforce.

Features like form recognition and automated data extraction reduce manual data entry, speeding up the onboarding process. Secure sharing and collaboration tools ensure that new hires have access to the necessary documents and resources, enhancing their onboarding experience.

Getting Started with WebViewer in Salesforce

WebViewer by Apryse revolutionizes document management in Salesforce by offering seamless integration, instant document rendering, and robust features for viewing, annotating, and editing documents. This powerful tool enhances collaboration, boosts productivity, and ensures secure handling of documents, addressing the limitations of traditional solutions. By consolidating document management within Salesforce, WebViewer simplifies operations, reduces costs, and delivers an exceptional user experience.

To experience these benefits, you can:

Explore our showcase

Start exploring our capabilities instantly with our interactive demo.

Let's Play!

Start a free trial

The WebViewer package and developer trial key can be downloaded at dev.apryse.com. The download package also contains a script, which will support optimizing for efficient deployment to Salesforce

I'm Ready!

Schedule a personalized walk-through

Chat with one of our solutions engineers to discover the best solution for your unique needs.

Show Me!

Connect with Apryse

Stay updated with all things Apryse by following us on: