

# 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.

www.m-files.com  
m-files@m-files.com  
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