

Document Extractor

Built for Salesforce Platform™

The tool that will store your Salesforce documents in SharePoint

What is Document Extractor

Document Extractor is an out-of-the-box solution which transfers files, documents and attachments from Salesforce to SharePoint and creates links to the files instead. You still retrieve the documents from where you placed them, but they are not physically in the CRM system.

Why you should use it

Document Extractor allows you to do your job even better – by storing invoices, purchase orders, reports etc. in SharePoint.

This provides several important benefits:

- Increasing data integrity and compliance with data protection regulation (country-specific, GDPR, etc.)
- Cutting down Salesforce storage costs
- Increasing team collaboration and document management
- Improving the CRM system's health

Why customers use Document Extractor

- Easier work with CRM attachments
- Possibility to share CRM documents, like contract drafts, with non-CRM users
- Salesforce experience is better without heavy attachments that slow down the system
- Easier to keep documents audit-ready



Why use SharePoint for storing Salesforce documents

SharePoint offers a much better tool to manage documents.

It helps to cut storage costs which are rather high in Salesforce.

Using SharePoint on-prem enables organizations to be in more control over data for GDPR compliance and data residency laws, if required.

It also enables Salesforce's optimal performance and speed, as it was not designed for storing files.

Finally, SharePoint-Salesforce combination provides great document and team collaboration features:

- More functionality in managing customer-related documents
- Possibility to share documents with non-CRM users or externally (e.g. for contract changes)
- Document check-out/check-in information
- Document version history saved

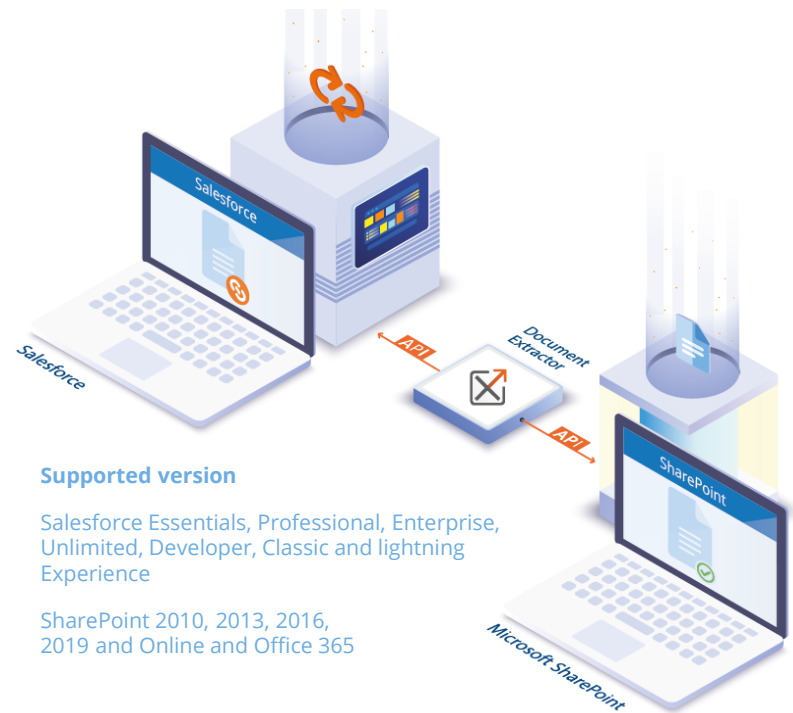


What does it do?

Document Extractor monitors documents in Salesforce related to accounts, contacts, leads, opportunities, quotes, contracts, orders, cases, assets, and email messages, creates an appropriate folder structure in SharePoint and stubs the files in the SharePoint locations.

It also transfers the information about the Salesforce document creator, editor and owner to SharePoint for easier tracking of the documents. They are also searchable from Salesforce Global search.

If two documents have the same name, the service creates a configurable postfix so that they can coexist in SharePoint.



Supported version

Salesforce Essentials, Professional, Enterprise, Unlimited, Developer, Classic and lightning Experience

SharePoint 2010, 2013, 2016, 2019 and Online and Office 365

The best of both worlds

Key features of Salesforce and SharePoint



- Number 1 CRM system in the world
- Advanced account planning
- Efficient pipeline management
- Customizability and scalability
- Continuous improvement and innovation



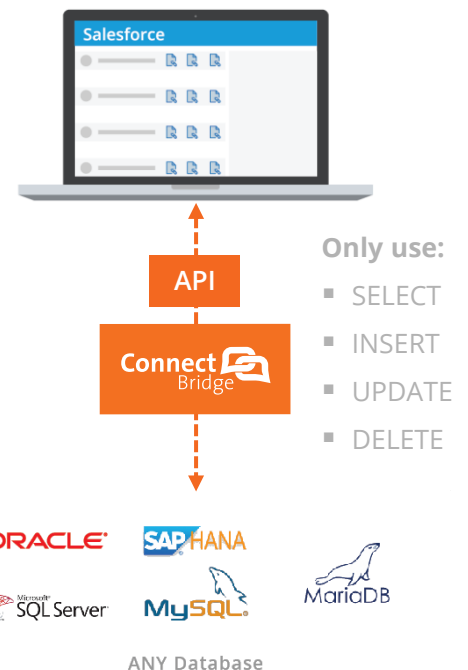
- Team collaboration
- Better and cheaper document storage
- Access to documents for non-CRM users
- Great document management and collaboration

Connect from any database to Salesforce [Add-on]

Welcome to the CB On-prem Database to Salesforce Solution. With this add-on, you can connect to Salesforce and operate data into it **from any database or client application**. This creates a lot of opportunities for connectivity and efficient data flow between Salesforce and other on-prem or cloud databases and other software.

The add-on is built on the powerful integration platform Connect Bridge by Connecting Software. We translate the communication with Salesforce into API calls and don't interfere in the system.

Therefore, from your local database management system (DBMS) or **any database**, you can **connect to Salesforce** and operate data into it.



SaaS vs Self-hosted



SaaS

For no-installation, plug and forget integration via our SaaS portal

No installation, no maintenance

Fast set-up and 24/7 stability

Scalable to your needs

Secure Azure-built portal



Self-hosted

For those needing to maintain full control over the integration

Run Service on premises / own cloud

Avoid paying for extra data-traffic

Ensure data storage compliance

Optimize customer file management

[TRY IT FREE](#)

Document Extractor Built for Salesforce Platform™ Our promise to you:

Our solution is trusted and recommended by professionals

Try First, then Decide:

- Take your free 15-day trial.
- For more info & to get your free trial please visit:



connecting-software.com

Benefits



Increases compliance with data protection regulation

Keep CRM documents in your SharePoint and improve compliance with most rigorous data protection regulations and audit requirements.



Maintains document integrity

Stubbed files have the same name and extension as the original files and they are searchable within Salesforce Global search



Increases document collaboration opportunities

Salesforce-SharePoint combination provides immense document collaboration opportunities for the whole team.



Slashes Salesforce document storage costs

Once a file is stubbed to SharePoint, the original is deleted from Salesforce but a link remains, pointing to the original file in SharePoint.



Improves Salesforce speed and health

Large-size documents and files hoarded in your CRM eventually compromise its speed and performance. We transfer them to SharePoint for you.

Why Connecting Software?

Connecting Software creates integration and synchronization tools for any developer, any software and any budget. Founded in 2004, Connecting Software is an award winning Microsoft Partner specializing in Software App Development. Connecting Software is now on the Microsoft Azure Marketplace and on Appsource. In Canada, we are listed in Government of Canada Software Licensing Supply Arrangement (SLSA).

