



Streamline the Storage and Retrieval of Sales and Service Records

Provide sales teams with immediate access to contract data and documents through the combined power of GlobalSearch ECM and Salesforce.



- Use data in Salesforce to scan and index documents into GlobalSearch
- One click access to documents in GlobalSearch directly from Salesforce
- Centralize document storage electronically and eliminate paper based processes
- Bind data, synchronizing data sets to eliminate manual key entry

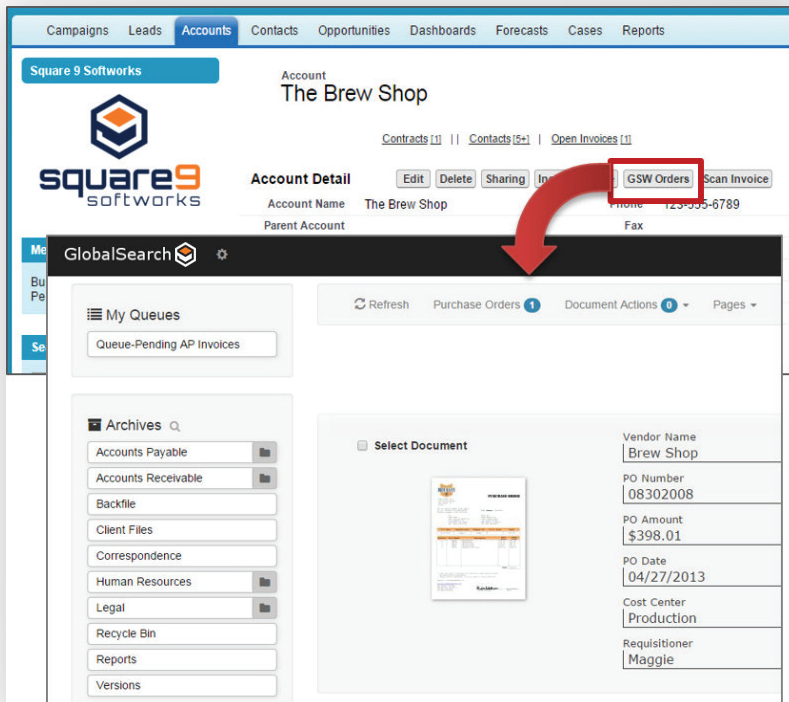
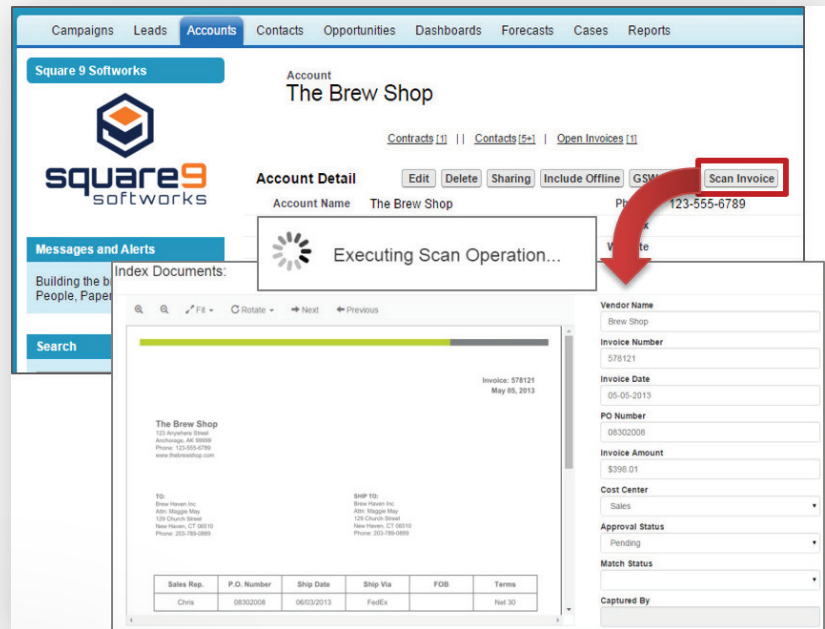
Key Features & Benefits

- ✓ Centralize document storage electronically to eliminate manual paper processes
- ✓ Utilize data in Salesforce to scan and index documents into GlobalSearch
- ✓ Bind Salesforce data to GlobalSearch picklists, synchronizing data sets
- ✓ Streamline administrative processes that associate with the filing, storage and retrieval of documents
- ✓ Access GlobalSearch documents in one click, directly from Salesforce screens
- ✓ Eliminate manual key entry, increasing data accuracy
- ✓ Gain visibility into review processes with automated notifications and escalations
- ✓ Increase customer service levels with direct access to documents from Salesforce screens

Powerful Integration Capabilities

Document Capture

As paper documents are received, they can easily be scanned into GlobalSearch directly from Salesforce. A custom button placed on a detail screen in Salesforce can call GlobalSearch's core web scanning capability to retrieve account information for indexing, eliminating paper storage to simplify retrieval. When indexing documents from GlobalSearch, live data from Salesforce will be available to help users streamline the indexing process and eliminate manual key entry.



Document Retrieval and Collaboration

Document retrieval can be initiated by a custom button on a detail screen. Users simply click the button and screen information such as the account name or ID is passed to an integrated search, which will retrieve any applicable documents the user has access to. From there the documents can be viewed, printed, emailed or annotated.

**Integrate GlobalSearch with Salesforce to Eliminate
Paper Storage and Simplify Retrieval**

Schedule a demo today!