



How Third Party Integrations Can Enhance Your Experience with ECM

ECM is used across a variety of industries and providers continue to offer newer, more robust solutions. One of the many factors that makes these solutions so powerful is their ability to integrate with the other programs your company uses every day. These integrations share information between databases and can reduce or eliminate the need for employees to transcribe data between systems. This allows time-consuming tasks to be streamlined and further automated. But among the countless integrations ECM providers have established, there are a few that are certainly too good to pass up.

QuickBooks

As the leading small business accounting software, holding around 80% of the market, it makes sense that there's a strong need for ECM integration with QuickBooks. Using a solution that integrates seamlessly with QuickBooks can eliminate double data entry as key information is extracted from financial documents such as invoices and purchase orders. Some solutions like Square 9's GlobalSearch can also use data from QuickBooks to automate bill creation, invoice routing, and other financial processes. With the [ECM provider's](#) experience in the field of accounting and a proper solution framework, the benefits that come with a QuickBooks integration are immense. Talk to us to see how affordable and easy it can be to add an ECM solution that works with your QuickBooks solution.

Salesforce

In addition to saving countless hours on manual data entry in Salesforce, the live, usable customer and lead data typically stored there allows for powerful ECM integrations. With GlobalSearch, for example, data stored in salesforce can be used to scan and index information into the GlobalSearch database. You can also open documents stored in GlobalSearch through

the Salesforce interface for a side-by-side comparison of information. Let us show you how Salesforce and GlobalSearch together can make your job easier.

DocuSign

Digital [contract management](#) benefits greatly from the automated, structured workflows ECM solutions provide. It's a no-brainer, then, that integrating ECM with DocuSign can overhaul contract management in incredible ways. These integrations make revising documents simple by quickly routing documents to the correct parties throughout the contract process. This automated routing can simplify the revision process as well as countersigning, archiving, and many other contract related processes. See for yourself how quick, easy and beneficial it is. Watch this short video (it's less and :45).

Square 9 Softworks offers powerful [enterprise content management solutions](#) with well-designed integrations for a number of other solutions including, Salesforce, QuickBooks, Microsoft 365, Microsoft Dynamics, DocuSign, and more. Learn more about our integrations here. For more information contact a local reseller or sales representative.



Sam Young

Sam is one of the dynamic voices behind Square 9 Softworks. Delivering highly effective messaging across reseller channels, end-user communities, and outside agencies, Sam develops, drives, and executes communication plans that effectively support Square 9's overall marketing goals and objectives.

To learn more, visit www.square-9.com.