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For Immediate Release

Square 9 Softworks Introduces Enhanced Integrations for Salesforce and SharePoint

Impactful Integrations Help Square 9 Customers Save Time, Reduce Errors and Increase Productivity while working within their native applications

New Haven, CT. June 14, 2023 – Square 9 Softworks, an award-winning solutions platform for simplifying document-related processes, continues to create unique and impactful integrations for their solutions, including ones for Salesforce, a leading customer relationship management application and Microsoft SharePoint, a file management application within the Office 365 suite.

Square 9's integration with Salesforce takes advantage of three distinct integration points. At its primary level, customers can now search for documents in Square 9's Enterprise Content Management platform, [GlobalSearch](#), without ever leaving the Salesforce interface, allowing customers to efficiently work within one application instead of frantically swapping between programs to reference accounts and their related documents.

A second integration point enables Square 9's Document Capture solution, [GlobalCapture](#), to scan documents directly from within Salesforce.com while consuming data residing on the page to file the record quickly and efficiently. By taking advantage of this integration point, customers no longer have to manually key repetitive information into two systems, thereby freeing up time and reducing the risk of errors.

Finally, a third point of integration facilitates the sending of forms or form completion requests from Square 9's Web Form solution, [GlobalForms](#), directly from within

Salesforce.com. This helps to ensure compliance and the maintenance of up to date records. In the event of a dated document, the Salesforce.com users can initiate a request which emails the recipient with a form for completion. Forms can be automatically prefilled with data from Salesforce.com where applicable, creating a more pleasant experience for anyone completing the forms.

Square 9 also offers an integration for SharePoint, a file management application within the Microsoft Office 365 platform. This integration allows users to extract information from documents and then route them through a powerful process management engine. Upon completion of the process, the data and documents are released to SharePoint to create organized file structures for the records. By automatically filing the final documents without the need for human touch, GlobalCapture, and Sharepoint users can save time and focus on more mission-centric tasks for their organization.

“A successful digital transformation should use all the solutions you've invested in cohesively to improve your business processes,” says Stephen Young, Square 9's President, and CEO. “the new integrations allow our customers to do this seamlessly while saving time, reducing errors, and improving productivity.”

Through continued research and development Square 9 continues to showcase its commitment to innovation and customer service.

About Square 9 Softworks®

At Square 9, we simplify common business tasks with enterprise content management, document capture, web forms, and business process automation tools that can be easily adapted to automate any paper-intensive process. That means you can spend less time on monotonous tasks and more time on growth and innovation. For more information, please visit www.square-9.com.

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