

NUANCE

The experience speaks for itself™

DATASHEET

eCopy Connector for Salesforce

Integrate paper-based documents information into Salesforce records and repositories

A CRM system is only as useful as the information contained within it, yet in organizations of all sizes and shapes, vital information remains trapped on paper, inaccessible to all those who have copies of the document in hand. With the eCopy Connector for Salesforce, users easily attach scanned documents to records and repositories within your Salesforce CRM system—directly from any eCopy ShareScan-enabled multifunction printer (MFP) or scanner. Dynamic, real-time connectivity makes it simple for users to simultaneously scan, enter or select tags, and upload paper-based information to:

- Specified Workspaces—personal or shared repositories within Salesforce
- The Notes/Attachments section of a Salesforce record
- Any authorized Document storage area within Salesforce

The Connector's intuitive push-button interface takes the guesswork out of scanning so the job is done right the first time, every time. eCopy's OmniPage® OCR engine delivers unparalleled recognition accuracy, turning static images into searchable, editable documents. Robust search capabilities let users quickly locate the specific record to which they wish to attach the scanned document. Information previously locked on paper is instantly available to everyone who needs it, so users spend less time shuffling through paper records and more time focusing on managing the relationships that drive your business.

Get even more out of your Salesforce CRM investment. The eCopy Connector for Salesforce make it easier than ever to get paper documents into your workspaces and customer records. It's the fast, simple, and convenient way to give your sales, marketing, and partner organizations ready access to the paper-based information they need to generate leads, close deals, and build strong, profitable customer relationships.

User Benefits:

- Cut through the clutter—Attach documents to Salesforce CRM records and repositories—in just a few simple steps—without ever leaving the MFP
- See the bigger picture—unlock paper-based information and gain a new dimension of visibility into lead generation, sale tracking and customer relationship management
- Make information more accessible—Transform static images into searchable documents as they are scanned
- Immediate productivity; attach scanned documents Salesforce records and repositories with no training required
- Get even more done at the MFP by further automating

Administrator Benefits:

- Extract even greater value from existing Salesforce investments
- Speed adoption and reduce support calls with push-button simplicity and a consistent user experience
- Maintain audit trails via user validation to ensure compliance with corporate security policies
- Stay in sync—Dynamic connectivity keeps the Connector up to date when Salesforce is changed or updated
- Leverage flexible configuration options to specify the Salesforce record types to which users can attach scanned documents

System Requirements:

- eCopy ShareScan Version 5 SP2 or higher
- Salesforce CRM Enterprise, Unlimited, or Developer Edition
- Microsoft® .NET Framework Version 3.5 and 4.0 must be installed on the eCopy ShareScan Manager server

Device Compatibility:

For the latest list of supported email servers, document management systems, network fax servers, and cost recovery systems, please visit: <http://www.nuance.com/for-business/by-product/ecopy/ecopy-connectors-and-extenders/index.htm>

For the latest list of supported platforms for eCopy ShareScan, please visit: <http://www.ecopy.com/support/platforms.htm>

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