M-Files®
for Salesforce CRM

Go folderless using the power of the cloud!

M-Files®: Bringing CRM and Document Management Together.

The Easiest Document Management Solution on the Market is Now Integrated with Salesforce CRM.

M-Files® is an easy to use solution that helps businesses make dramatic gains in productivity by improving the way they organize, manage and track documents and processes.

Customer-related documents, such as proposals, presentations, contracts, purchase orders and emails, are a key part of customer relationship management. M-Files integrates seamlessly with Salesforce CRM enabling users to easily tag (or attach) documents to Salesforce CRM objects such as accounts, leads, contacts and opportunities.

Store ANY document or information in a single central vault.

Cloud-based and on-premise solutions are available.

All file types are supported.

▶ Proven Technology
M-Files is not just another Web-based storage and sharing tool.

▶ Easy to implement
M-Files can be set up quickly without requiring a major investment of time and resources!

▶ It's Easy
There's no training or complicated new interface to learn. If you know Windows you know M-Files.

▶ Fast Search
Instantly find any file related to any Salesforce CRM record such as Leads, Opportunities, Accounts and Contacts.

▶ All Applications
All applications and file types are supported, including email and scanned paper documents.

▶ Offline Use
Access your documents any time, from anywhere – even without an Internet connection.

www.m-files.com/salesforce

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Proven Technology – not just another Web-based storage and sharing tool

M-Files is not just another limited Web-based file sharing and storage tool, it's a proven professional document management system used by thousands of customers around the world to organize and track important business documents. And now it's seamlessly integrated with Salesforce CRM enabling you to efficiently organize and track customer-related documents.

M-Files is Easy – If you know Windows, you know M-Files.

M-Files is easy to use because it doesn't require you to change the way you work. You store your documents in the centralized vault the same way you store files on any other hard drive on your system or network, but rather than searching through chaotic folder structures, you just save to the vault and tag. The M-Files interface is just Windows Explorer so you access the vault the same way you access My Documents or My Computer, it's just faster and more secure. All applications are supported using the File Open or Save commands you already know and use every day.

Tag your Documents Directly to Salesforce CRM Records

You can save any file to M-Files and tag it to related Salesforce CRM records. You can also view the details of Salesforce CRM records from M-Files, such as the address of an account or the amount of a quote, without having to launch the Salesforce CRM.

Access your Documents from the Salesforce CRM Interface

You can access the M-Files document vault directly from the Salesforce CRM interface; just select the Account, Lead or other record in Salesforce CRM and click the Show Documents button. You can also save new documents directly to M-Files via the Salesforce CRM interface, as well as make any Word or Excel document a template and include dynamic content from Salesforce CRM records, such as a contact name or address when creating a letter or proposal.

Fast Search – find any file instantly

One of the most important benefits of M-Files is that you never waste time looking for files again. M-Files supports searching on tags and full-text search, so once you store a document in the vault and tag it, just type in that tag - or any word in the entire document - and M-Files finds the document instantly.

Automatic Version History

M-Files automatically tracks version history every time a document is changed, maintaining an auditable trail of changes from the time a document is created up to its final released version. You can instantly retrieve any previous version to see what was changed, or roll back to an old version.

Secure – never worry about losing data again

- **Secure Access Permissions:** Hide sensitive documents from unauthorized access.
- **No Accidental Deletion:** If a user deletes a file it can always be recovered by "undeleting" the file.
- **Check-in / Check-out:** Ensure that changes to a document won't be overwritten by others.
- **Regular backups:** All documents with version history, metadata and audit trail are backed up regularly.

Offline Use – access your documents even without an Internet connection

Access documents without an Internet connection, such as when traveling, or if the office network goes down. Just set any document or group of documents for offline availability. You can also create and modify Salesforce CRM records and tag documents to them offline, and when you reconnect to the network, all records are automatically synchronized with Salesforce CRM and the documents are securely saved to the M-Files vault.