

M-FILES CORPORATION

# M-FILES ADD-IN FOR SALESFORCE CRM SOLUTION DESCRIPTION

LAST UPDATED JUN 8, 2022

VERSION 2.0

# Contents

1. Introduction .....	3
2. Architecture .....	3
3. Solution.....	4
3.1 Access Rights.....	5
3.2 Example Use Cases.....	5
3.3 Features .....	5
4. Licensing .....	6
5. Change History.....	6
6. Reference Documents.....	6

# 1. Introduction

- This document describes the high-level architecture and the features of M-Files Add-in for Salesforce CRM. For instructions on taking the add-in into use, refer to [Installing and Configuring M-Files Add-in for Salesforce CRM](#).

# 2. Architecture

To make the most out of the M-Files Add-in for Salesforce CRM (later in this document called also "add-in"), the Salesforce objects (Accounts, Opportunities, Leads, and so on) should be synchronized to M-Files using the M-Files Plugin for Salesforce CRM. The plugin keeps all object-related information in sync between Salesforce and M-Files. The object-related information can be contact details, billing information, or any other value that has been chosen to be synced. Once the Salesforce objects have been synced to M-Files, they will get an external M-Files ID, and all related information and documentation can be safely stored and linked to those Salesforce objects.

The external ID is used when configuring the add-in and making the content in M-Files available for Salesforce users. M-Files Add-in for Salesforce CRM is a simplified M-Files client, that can be embedded to any page in Salesforce CRM. The add-in uses vNext-based M-Files Web as its backend for connecting to M-Files Server. The vNext web engine is included in the M-Files server software package. You can install and update the add-in from Salesforce AppExchange.

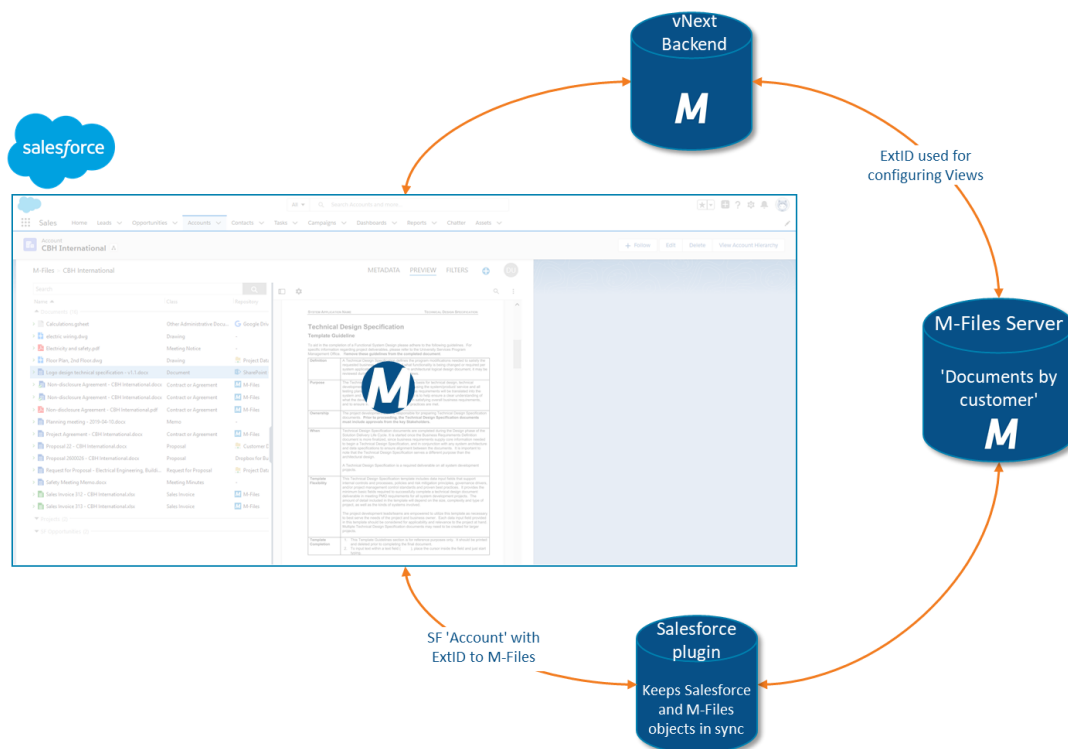


Figure 1: High-level setup of the add-in.

The add-in can be configured to show M-Files content based on a certain view, or it can be used simply to search for information inside M-Files with a keyword.

Page > M-Files Add-in

---

\*Server URI ⓘ

\*Vault GUID ⓘ

Default View URI (Optional) ⓘ

Object Identifier(Optional) ⓘ

Keyword (Optional) ⓘ

Allow Editing ⓘ

Figure 2: The add-in settings.

### 3. Solution

The add-in is one of the embedded M-Files installations that enable you to use M-Files inside other web applications. The add-in allows you to see all the content you are looking for directly via Salesforce, without the need to switch between applications.

The add-in is not meant to replace the M-Files clients (M-Files Desktop, M-Files Web, and M-Files Mobile), but you can use it for carrying out light daily tasks of viewing and editing content. Some features, such as defining new views or viewing object history, you can only use via the M-Files clients.

M-Files, as a unique repository-neutral solution, differentiates M-Files Add-in for Salesforce CRM from the competition, as the add-in makes all the content through various external repository connections available for you. The documents that you can access via the embedded user interface of the add-in can reside, for instance, on a network drive, a SharePoint site, or Google Drive.

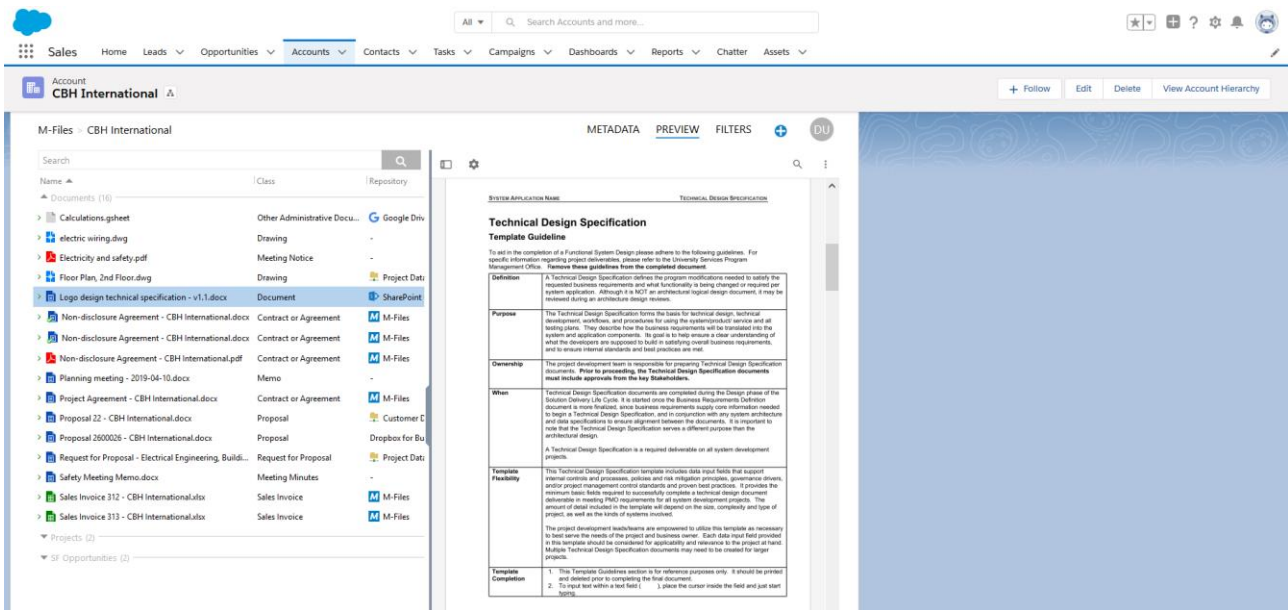


Figure 3: The add-in user interface in Salesforce.

### 3.1 Access Rights

All M-Files Add-in for Salesforce CRM users need to have a valid M-Files license. Access rights to the documents and other objects in M-Files are based on the M-Files permission settings of the objects. Single sign-on to Salesforce CRM and M-Files can be enabled with Azure Active Directory or Azure Active Directory Federation Services.

### 3.2 Example Use Cases

Sales personnel spend most of their time in Salesforce CRM. With the add-in, they can access all the customer-related documentation directly via Salesforce CRM. Sales personnel can easily check the customer orders or have up-to-date lists on expiring legal agreements with the customer. With M-Files, the documents are always the latest versions.

It is easy to integrate workflows to sales-related documentation management, and sales personnel can change workflow states and for example approve confirmation of orders via the add-in.

### 3.3 Features

The add-in can be configured to show M-Files content based on a certain view or a keyword, or optionally can just be used to search for information inside M-Files. By default, the add-in is in read mode, meaning that the users can view but not modify the objects and their metadata. The edit mode of the add-in enables modifying and adding metadata properties, including comments, permissions, and workflows.

The read mode of the add-in lists the objects included in the view, shows their metadata and comments, offers a preview of the document content, and allows you to search for content within the view. You can also open documents in read-only mode by double-clicking them, and browse object relationships in the listing area. When the add-in is in read mode, users cannot modify documents or their metadata even when the M-Files permission settings allow them to do so. This mode should be used when the data is only meant to be shared.

When editing via the add-in is allowed, you can add comments, edit metadata, modify permissions, and change workflow states. You can add new documents to M-Files by dragging and dropping them to the view or by clicking the **New** button. Being able to edit the documents and their metadata always requires you to have valid access rights to the objects.

The backend of the add-in is updated monthly along with the M-Files server update, making it possible to add new features and capabilities without requiring you to update the actual add-in in the SharePoint add-in catalog.

## 4. Licensing

M-Files Add-in for Salesforce CRM is available for M-Files Online customers only. Additionally, customers need to purchase a separate M-Files for Salesforce CRM license, which also includes the right to use M-Files Plug-in for Salesforce CRM. All M-Files Add-in for Salesforce CRM users need to have a valid M-Files license.

M-Files Add-in for Salesforce CRM is available for both on-premise and M-Files cloud customers.

## 5. Change History

The table below describes the essential changes by document version.

VERSION	DATE	ESSENTIAL CHANGES
1.0	2019-09-16	Initial version.
2.0	2022-06-08	Minor updates

## 6. Reference Documents

You may want to see these articles for additional information:

- [Installing and Configuring M-Files Add-in for Salesforce CRM](#)
- [Setting Up the Backend for the New M-Files Web and Web-Based Add-Ins](#)
- [Configuring Azure AD Application for OAuth 2.0](#)