

d.velop

d.velop connect for Salesforce

The missing piece of the puzzle for your CRM

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Already in use by leading companies

schüller.

DÜRR GROUP.

stepstone



d.velop documents

★★★★★ 4.89 (9)



Why do I need a DMS for Salesforce?

Many companies use Salesforce as a central platform for sales, service, and marketing – but documents are often created and managed across various systems. The d.velop solution provides a remedy: whether cloud-based or on-premises, all d.velop DMS functions are seamlessly integrated into the familiar Salesforce interface. Enhanced by modern AI features – from automatic document classification to support from generative AI – processes are further accelerated, making everyday work even smarter.

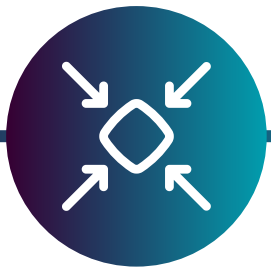
How an integrated DMS simplifies your work

Effortlessly access all documents in one location within your primary system



INDEPENDENT OF DEPLOYMENT MODEL

No matter the deployment model – our solution fits seamlessly.



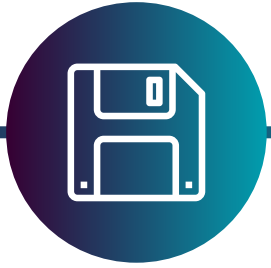
ONE PLACE FOR ALL YOUR DOCUMENTS

Everything you need in one place – no need to switch systems.



AN EXTENSION OF YOUR SOLUTION

Benefit from extra optional features – including digital signatures.



AUDIT-PROOF ARCHIVING

Make use of compliant, tamper-proof document archiving.



Fully operational with our DMS in just 72 hours*

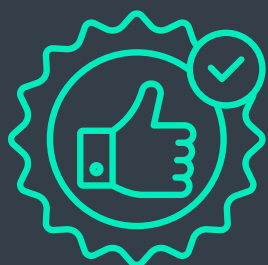
Bring structure and speed to your document processes with d.velop: All documents are centrally managed and directly available within Salesforce. Thanks to our many years of Salesforce expertise, we support you from consultation to implementation – quickly, smoothly, and tailored to your specific requirements. *Once system requirements are met and the offer is signed, you can be up and running with a DMS in Salesforce in around 72 hours.

Get expert advice and receive a tailored offer in three simple steps:

- Schedule a consultation
- Check system requirements
- Receive your offer

What matters to you:

- Ready to use in 72 hours* – no lengthy projects
- High user acceptance in Sales, Marketing & Service
- Modular and expandable – e.g. with AI or smart processes



PRACTICAL INSIGHTS

Centralising knowledge

Salesforce as your central knowledge hub for Sales and Service

- Unified access to all relevant documents directly from Salesforce
- Audit-proof storage with d.velop documents – available anytime, anywhere
- Digital signatures with d.velop sign accelerate contract processes
- Intuitive interface ensures high user acceptance
- More efficient workflows and fewer media disruptions across the entire sales team

