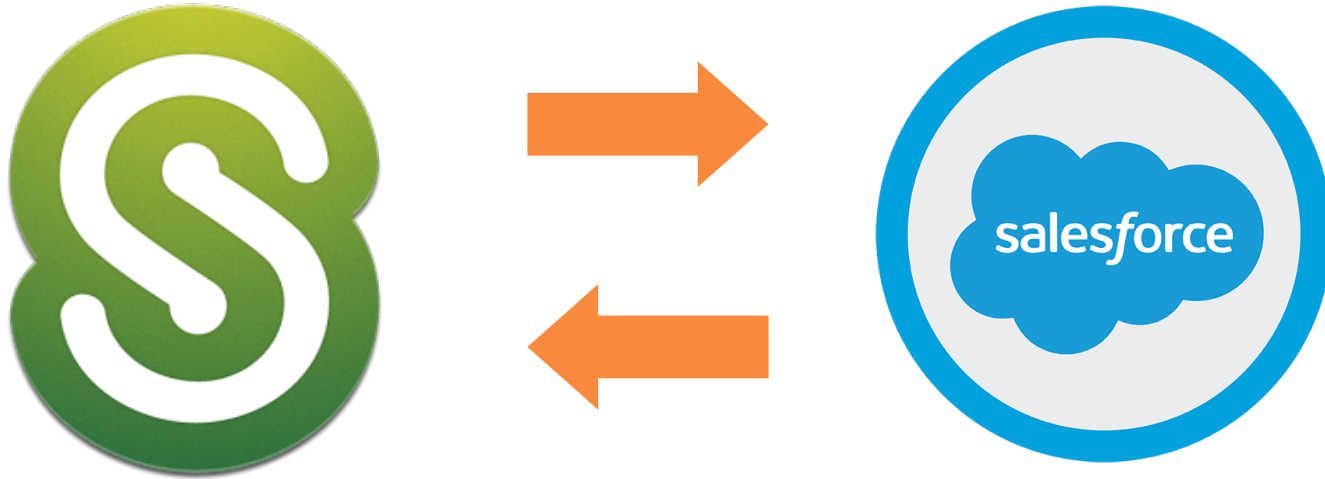


SHAREFILE INTEGRATION



ShareFile Integration Accelerator

ShareFile offers an out of the box integration with Salesforce but sometimes more advanced functionality is needed. This ShareFile accelerator provides an advanced integration between ShareFile and Salesforce to meet more complex needs.



The ShareFile integration accelerator provides a path to a solution when the basic ShareFile integration is not sufficient.



Contextual integration

Relate ShareFile folders to specific records in Salesforce.



Complex file upload requirements

Put workflow in place as part of the process of uploading files.

ShareFile Integration

Context Aware ShareFile Integration



This accelerator associates
ShareFile folders to
specific Salesforce records.

Sharefile

AC-2017-00044135 - Property MgmtTest Household Shared Files Upload Files Create Folder

Search for Files Go Clear

Download Back

	Name	File Size	Uploaded	Creator
<input type="checkbox"/>	1. Eligibility		02/14/2017	eight Cloud
<input type="checkbox"/>	2. Admissions		02/14/2017	eight Cloud
<input type="checkbox"/>	3. Special Handling (ROI, Special Circumstances, RAs)		02/14/2017	eight Cloud
<input type="checkbox"/>	4.1 Rental Assistance		02/14/2017	eight Cloud
<input type="checkbox"/>	4.2 Property management		02/14/2017	eight Cloud
<input type="checkbox"/>	4.3 Tax Credit		02/14/2017	eight Cloud
<input type="checkbox"/>	4.4 Market Rate Tenants		02/14/2017	eight Cloud
<input type="checkbox"/>	5. Violations		02/14/2017	eight Cloud
<input type="checkbox"/>	6. Community Services		02/14/2017	eight Cloud
<input type="checkbox"/>	7. Partner Services		02/14/2017	eight Cloud



Document Upload Workflow

Add steps to ensure the documents being uploaded are handled correctly.

Select Verification (choose one):

Action	Name
<input type="checkbox"/>	Application/Updates/Denial Information - Property MgmtTest
<input type="checkbox"/>	Briefing Letter - Property MgmtTest
<input type="checkbox"/>	Child Support - Property MgmtTest
<input type="checkbox"/>	Declaration of Eligibility and Authorization - Property MgmtTest
<input type="checkbox"/>	INS Verifications - Property MgmtTest
<input type="checkbox"/>	Intake THA 3rd Party Release of Information - Property MgmtTest
<input type="checkbox"/>	Picture ID - Property MgmtTest
<input type="checkbox"/>	Social Security Cards - Property MgmtTest

Showing 1 to 8 of 8 entries

[Next](#)

Upload Files

Upload Files to "1. Eligibility" Folder
To upload a file, click Choose Files. Select files from the pop-up menu, or drag files from your computer on to the box. To upload multiple files at once, hold down the Shift or Control key as you select files.

[Choose Files](#) or drag and drop files [Clear All](#)

[Close](#) [Upload Files](#)

ShareFile Search

Inline Search



Search for files in ShareFile folders **without leaving Salesforce.**

Sharefile




Search Result

Shared Files

Open in New Window

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<input type="checkbox"/>	Name	Folder Name
<input type="checkbox"/>	 2014-07-24 2500 Yakima LLLP - HAP Bay Terrace Phase I.pdf	CO-2014-002085

Showing 1 to 1 of 1 entries