COMMUNITIES CLOUD
DOCUMENT MANAGEMENT

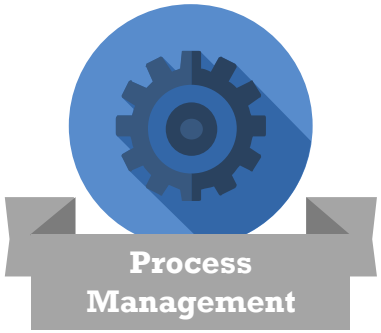
BEST PRACTICES PLAYBOOK

DOCUMENT MANAGEMENT IN THE 4TH INDUSTRIAL REVOLUTION

Why Use Communities Cloud?

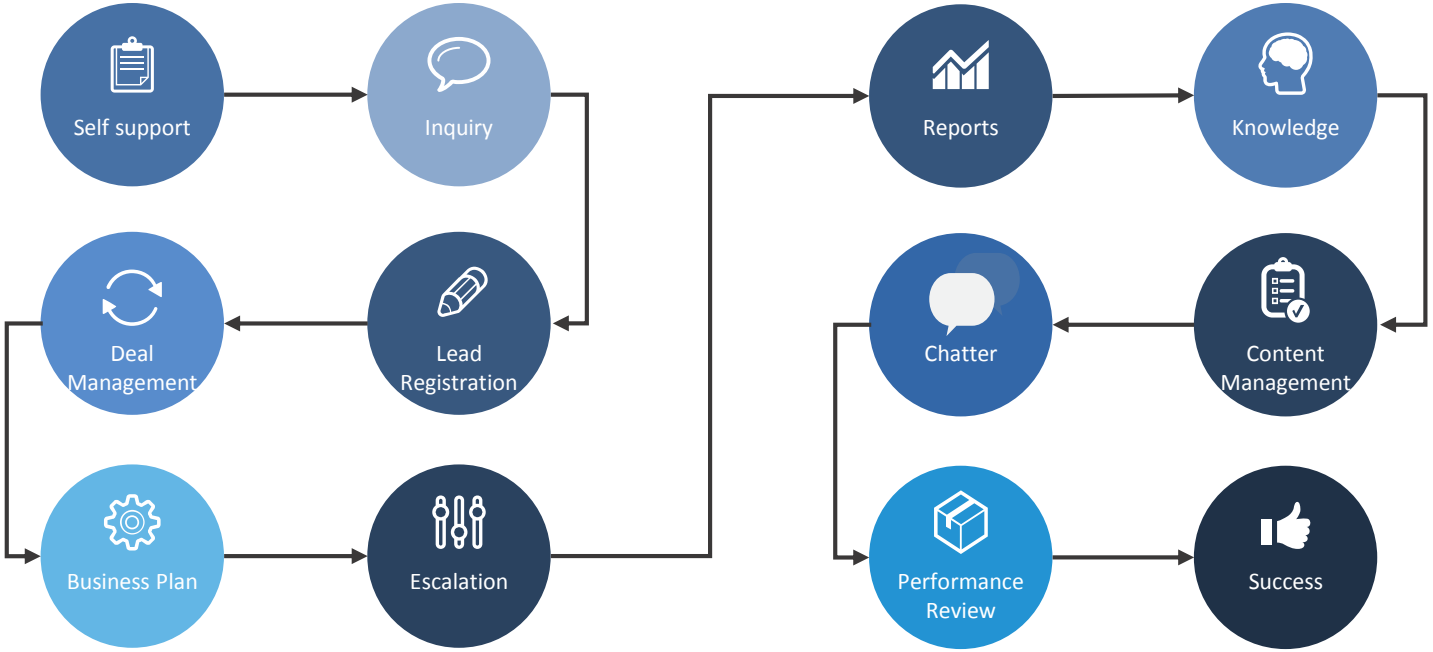
- Create a Partner portal to have two-way communication with channel partners
- Enable support inquiries from channel partners
- Deliver digital content (such as software, collateral)
- Use automation features to create and assign support partners

- Faster communication with partners
- Get a 360-degree view of your partners using the console
- Do more from within the console, including making and receiving phone calls and accessing knowledge articles



- Lead registration
- Business plan management
- Establish support statuses for your support processes
- Monitor partner performance through reports and dashboards

What Does Communities Cloud Bring?



A set of tools to drive channel partner excellence in enterprises

Document Management Challenges on Service Cloud

Uploading Large Case Files

Partners cannot upload relevant documents that are larger than 2GB

Difficulty on Lead Creation

While registering leads, partners cannot add documents. This is a separate process that is cumbersome

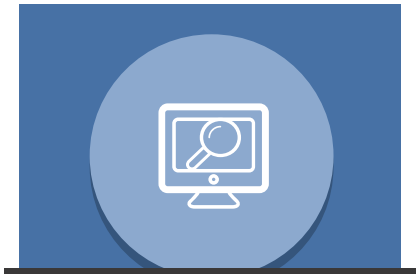
Delivering Digital Content

Enterprises cannot share digital content (such as a new software version or large-size collateral) easily

Inability to Retire Old Files

There is no mechanism on salesforce to safely, securely and cost effectively retire old files

How Can S-Drive Help?



Visibility

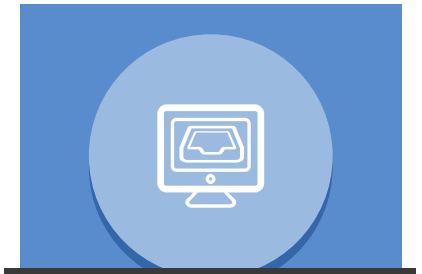
With easy reach to all files related to partners on Salesforce, enterprises will have better understanding of their partner needs

Accesibility

Partners can upload files critical to communicate from anywhere and at anytime.

Sharing

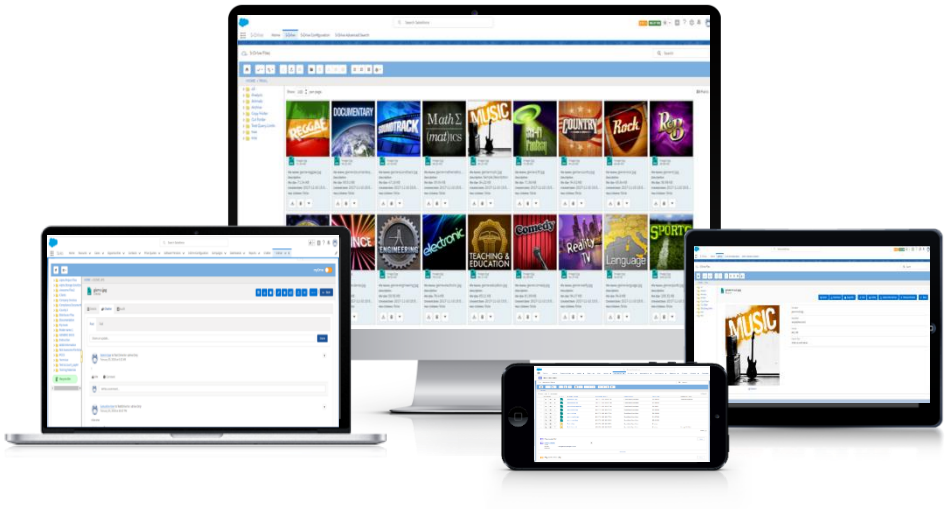
Partners having access to communities can easily view and upload digital content



Archiving

Enterprises can archive partner-related files based on their retention policy in a cost-effective manner

Where to Test Drive S-Drive?



Highest Rated

With its 4.9 Score, S-Drive is the most beloved Document Management app on AppExchange

Customizable

The most flexible platform to meet your needs on document management.

Simple to Setup

The easiest to setup among document management apps

Support

One of the most recognized customer support

To learn more, please visit

https://get.sdriveapp.com