#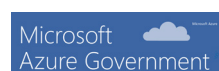 AMERICAN AUTOMOTIVE AFTERMARKET COMPANY STREAMLINES TEAM DOCUMENT MANAGEMENT IN SALESFORCE AND SHAREPOINT WITH DOCUMENT EXTRACTOR

SUCCESS STORY
Dorman Products,Inc

Customer
Dorman Products, Inc.

Headquarters
Colmar, Philadelphia - USA

Products and Services
Document Extractor

Activity
Supplier of replacement parts and fasteners for passenger cars, light trucks, and heavy duty trucks in the automotive aftermarket industry

> **" *Document Extractor is a tool our salespeople didn't know they needed, and now that they have it they can't imagine life without it'* ""**
>
> – Andrea Getty, Sr. Systems Analyst at Dorman Products, Inc.

Dorman Products, Inc. supplies innovative repair solutions for the automotive aftermarket. Established in 1918 and headquartered in Colmar, Pennsylvania, it is a manifestation of the American Dream. Founded by two brothers who made simple replacement parts, Dorman is now a publicly traded, global enterprise that produces more than 80,000 different products, including highly complex parts and electronics, for almost every area of the vehicle.

Andrea Getty, Senior Systems Analyst, has been with Dorman for almost 24 years and grown with the company. Lately, she has been working on business processes automation and content management as a SharePoint administrator. So, when a challenge for document flow optimization arose, it was for the expert to deal with it.

'We needed a document management solution for Salesforce'

'Our team was looking for a document management solution for storing documents and online editing in Salesforce', says Andrea Getty. The company was at the crawl stage with the Salesforce adoption but the team work on attachments in the CRM already showed distinct pain points. 'Our documents travelling with the process are big Excel spreadsheets with formulas. And our salespeople would store them everywhere: on OneDrive, in SharePoint, on their desktops. Finding the latest version and making sure you are not doing something

that another person has already done was a challenge', explains the Dorman representative.

'We needed a better process. So, the first thing I did was configure Files Connect, which is a standard Salesforce option connecting to OneDrive and SharePoint. It took me three weeks to get it to work. We started piloting with the core CRM team – and realized it doesn't do what we need it to do'.

Searching for a solution, the Dorman team reached out to the Files Connect Director at Salesforce, and after explaining their requirements, they were introduced to Document Extractor.

'Document Extractor ticked all the boxes'

Document Extractor by Connecting Software is a service running in the background that transfers documents and files from Salesforce to SharePoint, leaving a link to the document in Salesforce instead. It allows more convenient access to documents, cost-effective file storage and better control over documents.
'We launched a pilot with Document Extractor and saw that it does everything we wanted. It provides online editing features and eliminates the need to think about what version of the document you are on - it just pulls up the latest version. With Document Extractor, the process is seamless to my end users. They don't even know it is there, which is what we wanted', explains Andrea Getty.
As a SharePoint administrator, she enjoys 'a safety net' that comes with Document Extractor: as online editing is done via SharePoint, she can revert document versions if something goes wrong. 'We've been doing a lot of process improvement. Documents would travel through the multiple steps. Now we don't shuffle through various copies of those documents. One document - one source of truth'.

Ease of Use

Once launched, Document Extractor runs 24/7 in real time stubbing files automatically from Salesforce to SharePoint.
As Andrea Getty further explains, Dorman recently went live with Salesforce Summer '20 release, and it caused her to restart the service with Document Extractor. 'Not a big deal, took me two minutes. I was watching on Monday after the team came back online - they must have uploaded a hundred of documents in Salesforce. And the app just sucked them up and shelved them right in SharePoint. And none of them even realized it'.
Another feature the expert appreciated was the Managed Packages tool. 'I don't have a separate world I need to maintain for Document Extractor.

Or search for an executable file, for example, in my email. It is all contained within my Salesforce application'.

During her 30-year career in IT, Andrea Getty has implemented a lot of software. 'And Document Extractor has been one of the easiest – from the install and customer support perspective'.

One thing to improve in the combo, according to the company's representative, is carrying permission settings from Salesforce to SharePoint. 'But we got the information that it is blocked on the Salesforce side. Anyway, the Connecting Software team helped me to structure the security around the permissions the way it was acceptable for my leadership team. It has been a **privilege and pleasure to work with Connecting Software'.**

Cost saving with Document Extractor

Document Extractor also provides immense cost saving opportunities. As Salesforce charges for storage per MB, removing heavy attachments and turning them into links to SharePoint makes a difference for large organizations. And Dorman noticed it.

'As an IT person, I generally don't look at dollars and cents. But when I need to prove ROI – absolutely. Our Salesforce administrator wanted Document Extractor because of cost saving. I am looking at the ease of use from the technical perspective. So, we were able to meet in the middle because it solves

the problems for both of us', - explains Andrea Getty.

Takeaway

We are extremely happy to have Dorman on board with Document Extractor.

"We are very pleased that Dorman has solved their challenges with Document Extractor. Their approach was very professional - they could clearly define what they wanted. When experts on both sides work together, what you receive is great results", - says Connecting Software's CEO Thomas Berndorfer.

How does the customer feel about it?
'It's been exciting to be a part of Dorman and witness its growth while working with trusted vendors. Having Document Extractor in our Salesforce architecture, while not worrying about the document management issues, helped solve this puzzle', says Andrea Getty. 'Together with Salesforce, we believe we can take our business to the next level'.

Austria/Slovakia

Connecting
Software

4949 S Syracuse St, Ste 550
Denver, CO 80237
United States
Phone: +1 (720) 577-3030

Handelskai 340/5
1020 Vienna,
Austria
Phone: +43 1 3707 200

Poľná 5626
901 01 Malacky
Slovakia
Phone: +421 (0) 34 7725637

Caminho de Santo António
n.º 243,
9020-002 Funchal
Madeira Island - Portugal
Phone: (+351) 291 945 098

Madeira/Portugal