

## Ruffneck Scarves Streamlines Document Management with DocFynd



### Overview



Ruffneck Scarves, a leading provider of custom soccer scarves, was seeking a solution to streamline its document management processes between Salesforce and Dropbox. The company faced challenges in managing email attachments, organizing files, and ensuring easy access to documents across multiple platforms. To address these issues, Ruffneck Scarves partnered with TechParrot Innovations LLC to implement a customized solution using DocFynd.

### Challenges

Ruffneck Scarves was experiencing inefficiencies in its document management workflow, particularly with:

- Difficulty in managing email attachments and linking them to the correct Salesforce records.
- A lack of seamless integration between Salesforce and Dropbox, leading to time-consuming manual processes.
- Disorganized file storage that made it difficult to retrieve important documents quickly.
- The need for a more efficient way to tag and organize files related to sales opportunities.
- Limitation in Handling larger files due to size limit in Salesforce

### Solutions

TechParrot Innovations LLC proposed a customized DocFynd solution that addressed Ruffneck Scarves' specific needs. The solution focused on enhancing the integration between Salesforce and Dropbox while improving file organization and accessibility. Key components of the solution included:

- **Email Attachment Management:** DocFynd enabled Ruffneck Scarves to automatically upload email attachments to Salesforce and seamlessly save them to the corresponding record in Dropbox. This eliminated manual uploads and ensured that all relevant documents were easily accessible.
- **Dropbox File Access:** With DocFynd's integration, users could access files stored in Dropbox directly from the DocFynd interface within Salesforce. This streamlined the process of retrieving documents without needing to switch between platforms.
- **Folder Hierarchy Setup:** A structured folder hierarchy was established in Dropbox based on account names and their hierarchy, including opportunities and orders. This organization improved document retrieval efficiency, ensuring that files were easy to locate.
- **Document Tagging for Opportunities:** The solution also included automatic hashtag generation for files uploaded to Dropbox based on associated records (Account name, Opportunity name, or Order name). This feature made it easier for Ruffneck Scarves' team to search for and categorize documents related to specific sales opportunities.

### Results:

The implementation of the customized DocFynd solution delivered significant improvements for Ruffneck Scarves:

- **Improved Efficiency:** Automating the process of uploading email attachments and organizing files reduced manual tasks, saving time for the team.
- **Seamless Integration:** The direct integration between Salesforce and Dropbox allowed for smoother workflows and better collaboration among team members.
- **Enhanced Document Organization:** The structured folder hierarchy and automatic tagging system ensured that documents were well-organized and easy to find, improving overall productivity.

### Conclusion:

By partnering with TechParrot Innovations LLC and implementing a customized DocFynd solution, Ruffneck Scarves successfully streamlined its document management processes. The seamless integration between Salesforce and Dropbox enhanced file accessibility, improved organization, and ultimately boosted the company's productivity. Ruffneck Scarves now enjoys a more efficient workflow that supports its continued growth and success.

For More details on DocFynd Solution, Refer to the below link

<https://www.docfynd.com>

AppExchange Link:

<https://appexchange.salesforce.com/appxListingDetail?listingId=4b44534c-ddc2-4b20-bc20-11c8f1f691cd>