

BOX INTEGRATION

salesforce

Scope:

- **BOX Integration:** Seamless connection established between Salesforce and BOX.
- **Attachment Management:** Users can upload, edit, delete, and download files directly to/from BOX.
- **Sharing Controls:** Implemented user-friendly sharing options for efficient access management.
- **Enhanced File Size:** Overcame Salesforce limitations, enabling uploads of files up to 1GB.
- **Cost Savings:** Optimized BOX license costs and reduced Salesforce file storage expenses.
- **User-Friendly Interface:** Provided an intuitive interface for easy file handling and organization.
- **Client Satisfaction:** Successful implementation resulted in a satisfied client with improved file management.

Challenges:

- Savings on BOX license and Salesforce file storage costs.
- Streamlined and easy file uploading.
- Clients can now upload large-sized files.
- Intuitive interface with organized folders.
- Overall, the client is happy with the solution.

Solution:

- Build integration between Salesforce and BOX.
- Automatically create folders in BOX upon the creation of a new Salesforce record.
- Enable users to upload, edit, delete, and download files from the created folders.
- Use a single BOX license, sufficient for all users in the integration.
- Implement automatic login for users, eliminating the need for manual login.
- Allow users to upload files larger than 25 MB, supporting uploads of up to 1 GB per file, and associate them with the corresponding Salesforce record stored in BOX.

Results:

- Cost savings on BOX license and Salesforce file storage.
- Streamlined and easy file uploading.
- Ability to upload large-sized files.
- User-friendly UI with organized folders.
- Overall client satisfaction with the solution.



Integration

