

## TITLE

Novidea's Document Management and Filing Solution

## MEET THE HERO

[Novidea](#) is a product company providing an insurance distribution cloud platform built to digitalize insurance businesses. Leveraging the power of Salesforce's technology, Novidea offers a complete ecosystem that integrates customer-facing policy transactions with middle and back-office operations.

## ABOUT CLIENT

Industry	London , UK
Headquarters	<a href="https://novidea.com/">https://novidea.com/</a>
Website	December 2021
Start of the project	Ongoing
End of the project	

Insurance Technology



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## THE CHALLENGE



Novidea needed an advanced document management solution to handle documents across multiple third-party document management systems while enabling seamless filing directly from Outlook. Their primary challenge was to:

- Manage and store documents efficiently without incurring high costs for using Salesforce as document storage.
- Organize documents into a customized folder structure based on dynamic business rules.
- Enable direct linking and categorization of emails from Outlook to Salesforce records.
- Deploy a flexible, package-based solution that could be configured for any Salesforce organization and object without additional code modifications

## Our solution

Synebo developed a robust document management and filing solution that included:

- A custom Lightning Web Component for an intuitive document upload interface, enabling tagging, attachment, preview, copying, and deletion, with an option for automatic deletion after a defined period.
- Backend integration with OAuth 2.0 and Apex using Salesforce's Auth Provider framework for authentication.
- A Java middleware server to overcome Apex's heap size limitations and handle large file processing.
- A custom Outlook add-in built with React and C# featuring Single Sign-On (SSO) support, allowing seamless integration with Salesforce for email-to-file uploads.

## The results

Novidea successfully streamlined its document management process, reducing the costs associated with Salesforce storage while maintaining full integration with Salesforce records. The solution enabled the storage of documents in a customized folder structure, dynamically configured based on business needs. Users gained the ability to link emails

directly from Outlook to Salesforce records and categorize them appropriately, improving efficiency and accessibility.



Custom Lightning Web  
Component for documents



Java middleware  
implementation to support  
large file processing



Outlook add-in with SSO,  
enabling email-to-Salesforce  
integration