zpaper

zPaper:Transport

Multi-Channel Document Exchange and Document Generation for Salesforce. Simplified.

zPaper:Transport empowers customers to seamlessly receive, generate, and send documents within a unified Salesforce experience, all under the secure umbrella of zPaper's HITRUST CSF Certified & HIPAA Compliant platform. Experience the convenience and security **for an unlimited number of users per Salesforce org.**

In today's dynamic environment, organizations are overwhelmed with consolidating and managing extensive amounts of inbound and outbound documents from multiple sources. The need to utilize separate document exchange and generation tools brings additional integrations and expanded costs, leading to disconnected and costly processes, risks of missed or lost documents, leakage of confidential information, multiple manual processes, countless delays.

zPaper:Transport quickly improves engagement processes between healthcare organizations and patients by streamlining the exchange and generation of documents within a native Salesforce experience, enhancing operational efficiency, care coordination, and user satisfaction, **all with no additional integration work required.**

Key Benefits

- **Quick Setup:** Install the zPaper:Transport managed package with no integration work required.
- **Secure and Multi-Channel Capability:** Utilize zPaper's HITRUST Certified and HIPAA-compliant fax infrastructure to send and receive documents securely across multiple channels such as fax, email, direct message, and Stampz.
- **Intuitive User Interface:** Experience a simplified, flexible solution that can be placed on any standard or custom Salesforce object.
- **Unlimited Users:** Access is on a per-org basis, allowing each licensed Salesforce user within an org to access all zPaper:Transport functionality with no additional user charges.
- **Salesforce Object Flexibility:** Initiate outbound documents from any standard or custom Salesforce object.
- **Dynamic Document Generation**: Easily generate documents with data from various Salesforce objects, maintaining flexibility and compliance.
- **Enhanced Template Accessibility and Control:** Secure and flexible template storage, access, and version control, allowing for quick modifications and adherence to brand standards.
- **Efficient Document Management:** Document bundling, and dynamic length fields that ensure clean representation of all merged data and adapt to content length.

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Inbound and Outbound Document Management

Features and Capabilities

- **Improved Document Routing:** Eliminate manual routing and ensure documents are appropriately assigned to maintain compliance and security.
- **Centralized Document Retrieval**: Receive documents seamlessly from fax into a centralized list view.
- **Channel Scalability**: Opt for a zPaper-provided fax line or utilize your own, and expand your reach with additional channels like email and Stampz by zPaper. Address evolving needs by upgrading to include Direct Message or zDocument360 for advanced automation needs.
- **Reduced Processing Errors:** Minimize errors due to administrative mistakes or discrepancies between analog and digital channels.
- **Advanced Insights:** Gain deeper insights into document retrieval, delivery, and fax call statuses through comprehensive reports and dashboards leveraging zPaper data.
- **Enhanced Document Management:** Leverage Salesforce's Received Document Record to automatically attach inbound documents once received when using zPaper:Transport for Health Cloud.

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Document Generation

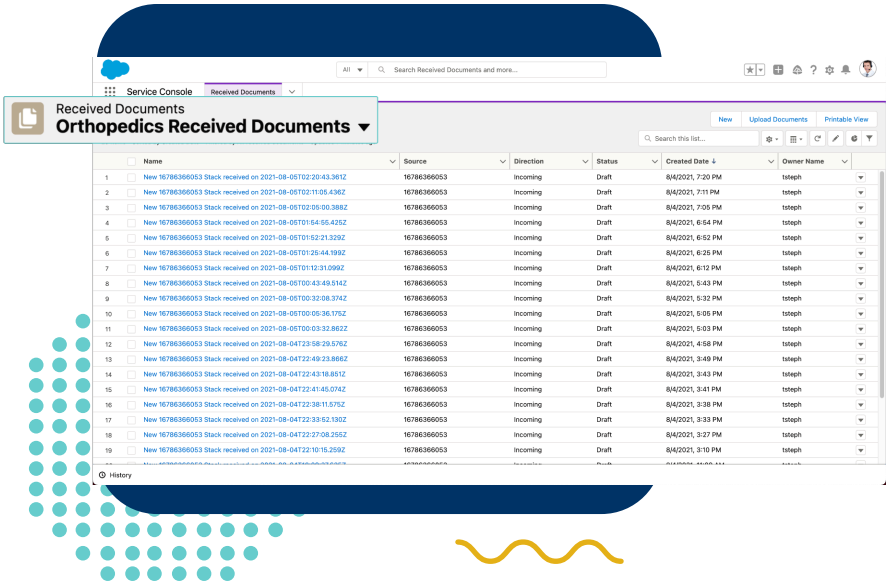
Features and Capabilities

- **Object Flexibility:** Generate documents effortlessly using data from standard and custom Salesforce objects, including the ability to pull FHIR data using the Salesforce Clinical Data Model.
- **Enhanced Security:** Maintain operational compliance and program security by controlling document sources.
- **Ease of Use:** Benefit from minimal configuration requirements and utilize DOCX documents for faster creation and updates compared to interactive PDFs.
- **Template Accessibility:** Store templates in Salesforce for quick access and version control, with the option for users to download generated templates to their local drive as needed.
- **Rich Text Field Support:** Uphold style and brand standards with documents reflecting the required font types, styles, and colors.
- **Compliance Assurance:** Limit selectable file sources for templates to ensure compliance and adherence to process standards.
- **Structured File Naming:** Assign specific names to documents to ensure consistent template usage.
- **Dynamic Length Fields:** Adapt document fields to ensure all merged data is cleanly represented, adding new pages as necessary.
- **Document Bundling:** Create document bundles of up to 10 pages from a single experience with ease.
- **PDF Lightning File Attachment:** Attach generated documents to the originating record as a Salesforce lightning file.

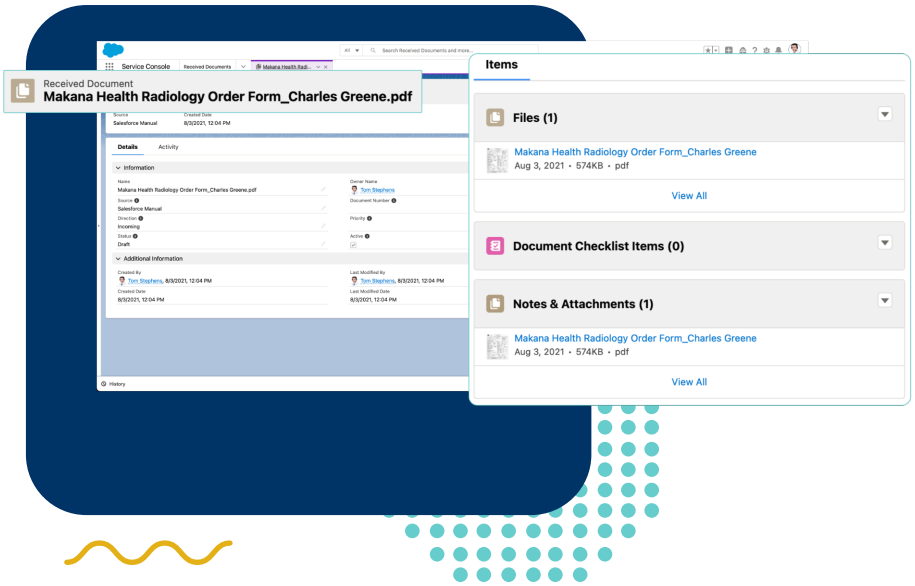
How it Works

Inbound and Outbound Fax

Receive documents directly into Salesforce.

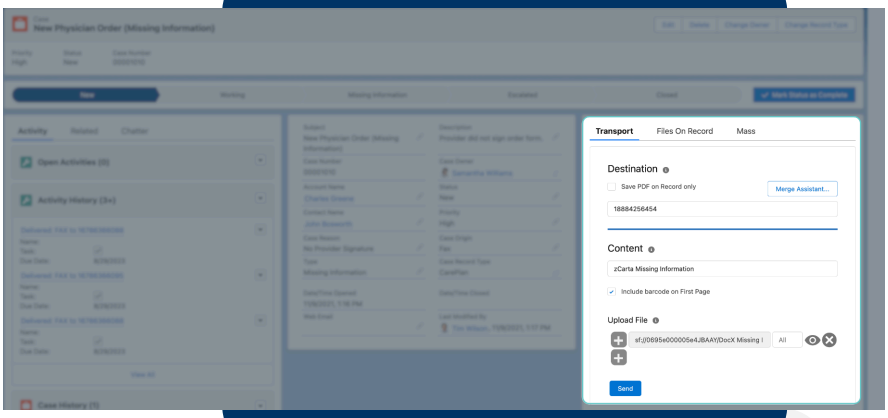


Automatically assign incoming documents to a queue or owner based on channel.



If using Health Cloud, received documents are associated to a Received Document Record that has been automatically created upon receipt.

Send outbound documents from any standard or custom object.



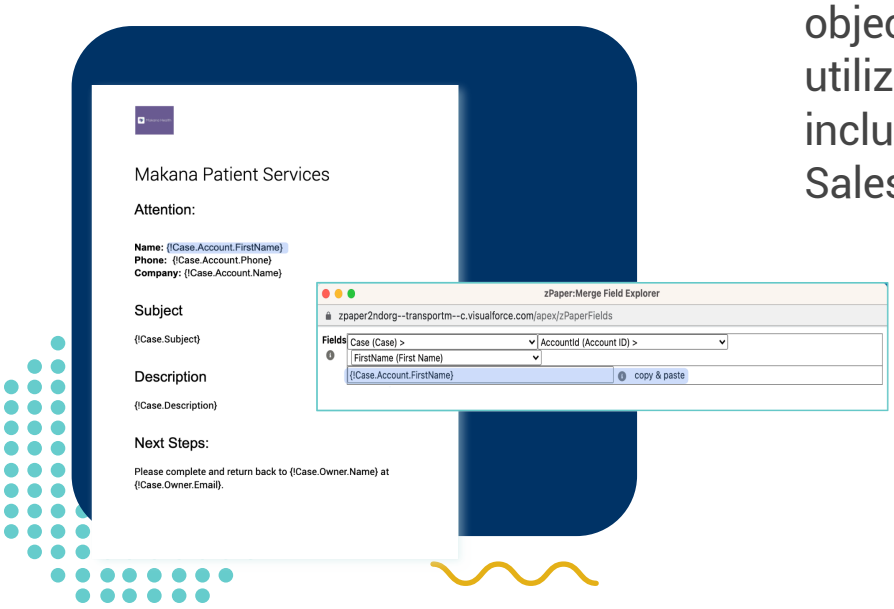
Automatically route and attach documents to their originating record once returned utilizing zPaper's Intelligent barcode feature.

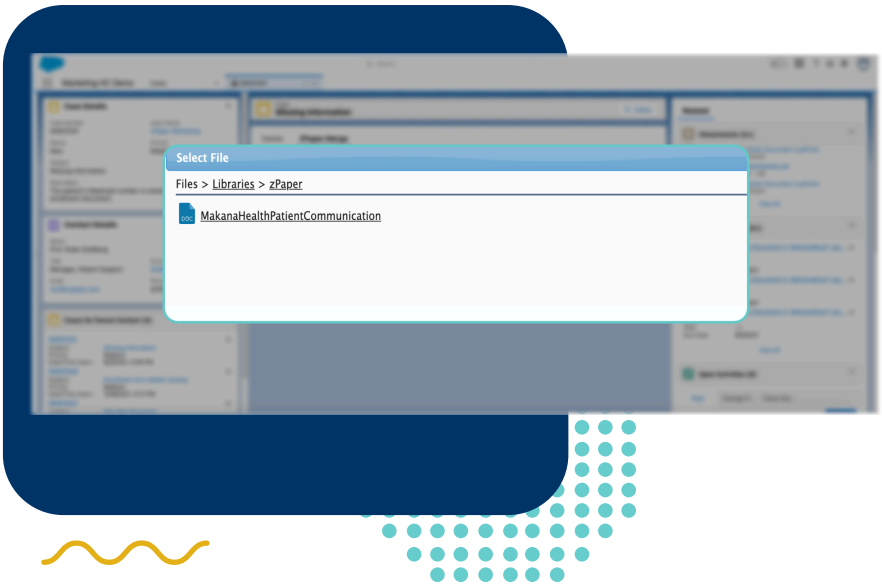
How it Works

Document Generation

Create templates from any solution that allows you to save and export a document in DOCX format.

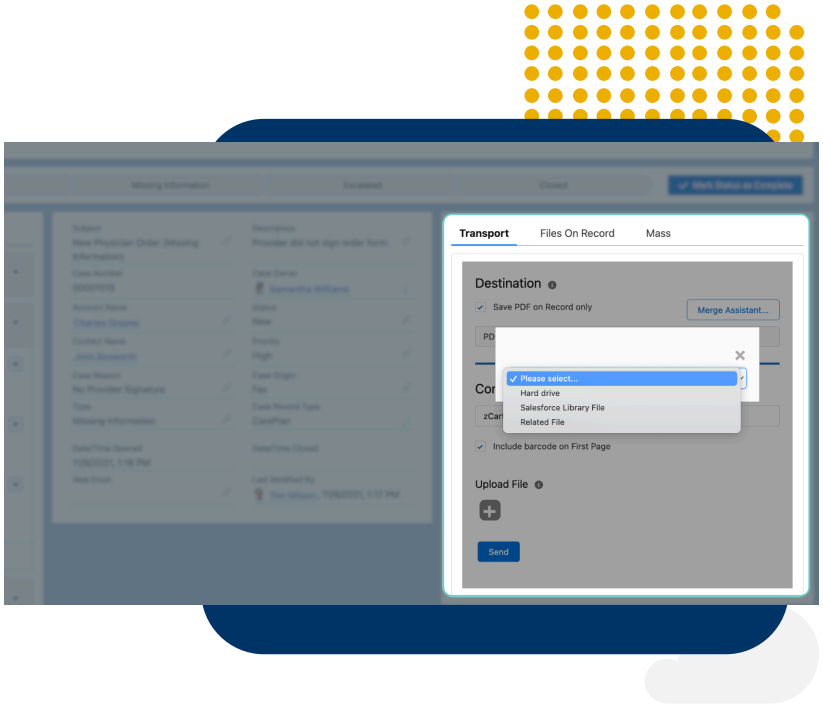
Quickly access fields across standard and custom Salesforce objects to map within your template utilizing zPaper's merge tool. This includes FHIR data using the Salesforce Clinical Data Model.



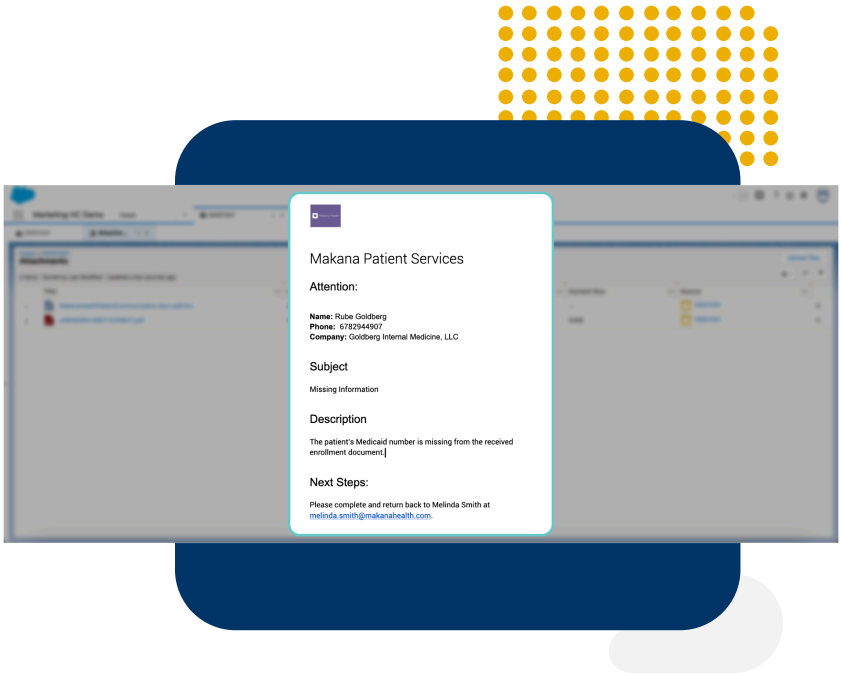


Save your DOCX template in Salesforce or a local drive.

Select and generate templates within a single Salesforce experience.



View generated documents from within the lightning file attachments on your Salesforce record.



zPaper:Transport is reshaping how organizations handle document exchange and generation by delivering a secure, intuitive, and scalable solution built natively into Salesforce. This ensures elevated operational efficiency, superior user satisfaction, and enriched patient interactions, establishing a new benchmark for multi-channel engagement.

Interested in learning more?

Visit us at www.zpaper.com

For additional questions, contact us at:

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