Finity360™ DOCS

NATIVE SALESFORCE DOCUMENT MANAGEMENT

PRODUCT OVERVIEW

SECURE DOCUMENTS. INTELLIGENT ACTION. ONE CONNECTED SALESFORCE EXPERIENCE.

Finity360 Docs brings secure document management, compliance controls and AI-assisted intelligence into Salesforce. Firms can capture, classify, store, share, retain and retrieve documents, preserve version history, monitor key obligations and initiate supervised workflows—reducing manual effort, improving responsiveness and supporting audit readiness in one connected operating environment.

Finity360 Docs is a native Salesforce document management platform built for financial services. It gives firms a secure, scalable way to capture, store, organize, share, protect and retrieve client and business documents while keeping users, records and workflows in one system.

YOUR SALESFORCE. YOUR DOCUMENTS. ONE EXPERIENCE.

CORE CAPABILITIES

Native Salesforce experience

Manage documents from standard and custom Salesforce records.

Secure external sharing

Share files externally while maintaining delivery and audit details.

Versioning and auditability

Preserve history, recover prior versions and trace document activity.

Folders and subfolders

Organize documents in a familiar structure beneath Salesforce records.

AWS-backed storage

Support large volumes and reduce reliance on Salesforce file capacity.

Workflow automation

Connect document activity to Flow, approvals, Apex and APIs.

STORE IT. UNDERSTAND IT. ACT ON IT.

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BUILT FOR REGULATED FINANCIAL SERVICES

Protected records. Intelligent action.

Finity360 Docs combines compliance-focused records management with AI capabilities that understand document content, automate filing, surface important information and initiate the right next action in Salesforce.

COMPLIANCE-FOCUSED RECORDS MANAGEMENT

Finity360 Vault Lock

Protected record retention for documents that require durable controls.

WORM support

Write Once, Read Many support for records protected from modification or deletion.

Retention management

Retention controls with document version history and traceable activity.

Fast document retrieval

Find records quickly for SEC, FINRA, state and internal audit requests.

Secure, durable infrastructure

AWS-backed storage supports highly durable cloud infrastructure and scalable document volumes, while Salesforce remains the connected operating experience.

ONE CONNECTED PLATFORM

Documents, client data, workflow and intelligence remain connected inside Salesforce.

FINITY360 DOCS INTELLIGENCE*

AI Auto-File

Recognize the client, document type, account, custodian, date and metadata, then file to the right record and folder.

Document analysis

Summarize, extract fields, answer questions and compare versions for changes, clauses or missing information.

Key dates and obligations

Detect expirations, renewals, notice periods and review dates before action is required.

Agentic actions

Create tasks, reminders, service requests, approvals or follow-ups and monitor completion.

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DOCUMENT INTELLIGENCE IN PRACTICE

Documents become action inside Salesforce

Finity360 Docs can turn incoming content into organized records, structured intelligence and supervised operational follow-through.

EXAMPLE: CONTRACT INTELLIGENCE

A contract arrives. Finity360 Docs identifies the client, files the document, extracts key terms and stores them in Salesforce.

An AI agent can then create a review task before renewal, alert the relationship owner, initiate approval and track the process through completion.



01	02	03	04	05
Capture	Understand	Organize	Act	Monitor

Intelligent email and document capture

Working with Arcus Email Intelligence, inbound emails and attachments can be associated with the correct client, classified, filed and used to initiate follow-ups, service requests or approvals.

BUSINESS OUTCOMES

Less manual filing

Reduce document naming, tagging and filing effort.

Faster insight

Understand important content without reviewing every page.

Proactive follow-up

Track dates and obligations before deadlines are missed.

Better client service

Turn document requests into Salesforce tasks and workflows.

Audit readiness

Find and organize records quickly for regulators and internal teams.

One connected platform

Keep documents, client data, workflow and intelligence together.

Documents become data. Data becomes intelligence. Intelligence becomes action.

* AI and agentic capabilities are proposed product-positioning concepts. Availability may vary by implementation, configuration and licensed services.

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