



# SpringCM Solution Data Sheet Cloud Connector for Salesforce and Force.com



## KEY BENEFITS OF SpringCM's ON-DEMAND CLOUD CONNECTOR SOLUTION

- Easily manage contracts, proposals, marketing assets and sales tools
- Enhance the value of your documents/ unstructured content
- Speed routine and ad-hoc business processes
- Experience the power of integrated process automation
- Gain peace-of-mind with a secure and compliant repository
- Enhance collaboration by extending content access to non salesforce.com users

## ABOUT SpringCM

SpringCM delivers enterprise-class content management software as an on-demand service with fully integrated capture, document management and workflow.

## NEXT STEPS

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Companies using salesforce.com have already experienced the benefits of SaaS CRM and now they are exploring many other applications built on Force.com. But if you are using Salesforce and Force.com alone, you are only addressing the data side of your needs. For example:

While Force.com has a content component, many companies find they need more functionality to truly automate content-centric processes such as correspondence management, contract management, case management, marketing program management, and more.

If you use Salesforce for sales force automation...	How do you manage contracts and proposals through the creation, approval and submission cycle?
If you use Salesforce for marketing...	How do you manage the creation approval and sharing of marketing collateral – especially with partners and others outside your organization?
If you use Salesforce for customer support...	How do you manage the creation and sharing of technical documents that require version control and secure collaboration?
If you use Salesforce for case management...	How do you manage the correspondence and content that sits behind that case?

For companies looking to develop rich content applications that are fully integrated with salesforce.com and/or Force.com, SpringCM offers its Cloud Connectors for Salesforce and Force.com that lets you add one or all of the following capabilities to your Force.com applications:

- Automatic document expiration and notification: never miss a renewal
- Fax integration: automatically provision your own toll-free fax line and receive faxes directly into Force.com applications
- Email integration: assign an e mail to any Force.com or SpringCM folder and streamline capturing all kinds of communication in Force.com applications
- OCR: all content; PDFs, e mails, faxes, documents – are full text searchable
- Merge/split documents: complex document splitting and auto document generation using data from any Force.com object. Generate reports, auto-replies, letters, and contracts automatically
- Version control, audit trails and security: comprehensive document management features provide control and visibility to document revisions

“SpringCM’s integration with salesforce.com gives us much more than document management. It supports our needs across the entire contract lifecycle.”

— Steve Parker, Stratus Technologies



- Tagging and keywords: full metadata and tagging is supported to allow you to track document content status and terms
- Process automaton: from simple automation to complete Business Process Management including pulling data from and putting data into Force.com database tables
- ERP integration: extract data from documents and place it in Force.com or your installed ERP system - many ERPs are supported
- SharePoint Integration: if you are using SharePoint, SpringCM Cloud Connectors for SharePoint provide rich content applications that can be exposed in SharePoint portals
- eSignatures: fully supported and integrated with document workflows. Signed documents are managed and stored in the document repository
- Records management: store content in compliance with

corporate standards for retention and destruction; support e-discovery processes

## All from SpringCM — The Leader in On-Demand Content Management

SpringCM is the recognized market leader in on-demand, enterprise-class content management. Led by enterprise content management (ECM) industry veterans, SpringCM is the first vendor to deliver via the cloud affordable, easy-to-configure content management (CM) services that span document and records management, workflow and capture. Using the CM services, enterprises, systems integrators and ISVs can easily create and operate subscription-based content applications that automate hundreds of business processes. SpringCM and partners also offer a variety of pre-configured applications such as Contract Management, Invoice Processing and Privia, the leading application for government bid and proposal management, at the SpringCM Solutions Central marketplace. With SpringCM, leading companies like Avon, Comcast, Health Net, National Australia Bank and Cox Communications have been able to cut costs, ensure compliance and increase revenues. For more information, please visit [www.springcm.com](http://www.springcm.com).

Features and Functionality	
Full integration with Salesforce and the Force.com platform means you get all this functionality delivered with the ability to:	
Manage content from any object, even custom objects	Expose the relevant content in any Force.com object
Upload content to SpringCM from within any Force.com object	Add content to SpringCM from any object in Salesforce
Synchronize security and user groups	Mimic Salesforce user security and/or extend the model for more granular access controls. Add users in Salesforce and they are automatically created in SpringCM
Create Tasks	Automatically log and track activities triggered in SpringCM in Salesforce (e.g. sending content for review or a document for signature)
Automate document processes in and outside of Force.com applications	Seamlessly integrated BPM tool accessible from within Salesforce
Mash up reporting	Visibility into work processes through merged Salesforce and SpringCM data
Support document creators and editors	Extend access to content beyond Salesforce users – give document creators a content-centric system in which to do their work
Mail merge/document merge	Populate document templates (such as contracts and proposals) with data residing in Salesforce

