



# SpringCM Process Automation with Salesforce

## PS-101

### **Course Description:**

This course covers in detail SpringCM's integration with Salesforce.com and illustrates how users have access to all their contracts and documents in SpringCM directly through Salesforce. As well as the installation and setup of the integration using the SpringCM App in the AppExchange, this course also covers purpose-built workflow functionality that allows for reading, writing and creating data from/to Salesforce.com and how to use these elements in workflow design and implementation to add powerful integration capabilities to any process.

### **Course Objectives:**

Upon completion of the Process Automation with Salesforce course, attendees will be able to:

- Initiate SpringCM workflows from Salesforce
- Install SpringCM within Salesforce
- Define Salesforce Configuration
- Define SpringCM Configuration
- Manage users in Salesforce and have them synced automatically to SpringCM
- Map a Salesforce user Role or Profile to a security group in SpringCM
- Enable automatic Chatter posts based on SpringCM activities
- Install the dynamic search widget called SpringCM "GetIt" based on predefined search criteria
- Use SpringCM's "External Object Storage" framework to utilize advanced workflow capabilities
- Create contract documents using Salesforce data and send for review
- Update and create Salesforce data from SpringCM's Advanced Workflow
- Leveraging SpringCM's API to initiate a SpringCM workflow through use of a Custom button

### **Audience:**

- Administrator
- Business Analysts
- Developers
- SpringCM Implementation Partners
- Business Users, Sales Operations, and IT Managers

**Prerequisites:**

SpringCM Essentials workshop or equivalent experience. Programming experience is highly recommended.

**Duration:**

1 Days

**Course Topics:****Module 1: SpringCM-Salesforce Integration Overview**

- Install SpringCM within Salesforce
- Define Salesforce Configuration
- Define SpringCM Configuration
- Manage user in Salesforce and have them synced automatically to SpringCM
- Learn how to map a Salesforce user role or profile to a security group in SpringCM
- Learn how to enable automatic chatter posts based on SpringCM activities
- Install the dynamic search widget called SpringCM Get-It based on predefined search criteria

**Module 2: External Object Storage framework**

- Exploring SpringCM and Salesforce Integration
- Learn about SpringCM's "External Object Storage" framework used by the SpringCM Cloud Connector for Salesforce, and how it is leveraged in SpringCM's Advanced Workflow

**Module 3: Workflow Development**

- Create contract documents using Salesforce data, and send for review
- Create and update Salesforce data from SpringCM's workflow
- Learn how to initiate SpringCM workflow from Salesforce

