



SpringCM for Salesforce

Power your own secure content cloud for storing and sharing content without leaving Salesforce

SpringCM for Salesforce gives you a secure content cloud within Salesforce to centralize, organize, and share content both inside and outside your organization. Now you can have one-click access to all the information you and your colleagues need to do your jobs—organized and easy to find—without leaving Salesforce.

To prevent information overload and increase productivity, two SpringCM apps—File it! and Get it! —deliver different slices of SpringCM content depending on what you are doing and where you are in Salesforce. We call this “content in context.”

As you work with your SpringCM content, you can tap into the power of an unparalleled set of content management features, including the ability to edit documents with one click, share them internally with a private link, or turn any document or folder into a public webpage. Best of all, IT relaxes because security is never a concern.

SpringCM content cloud

Our Salesforce customers tell us that before SpringCM 80% of the content their sales teams needed to do their jobs lived outside Salesforce. (And it wasn’t easy to find.) SpringCM extends your investment in the Salesforce platform by elegantly handling all your organization’s document management needs inside and outside Salesforce. Your SpringCM content cloud gives you a single place to store both sales-related content and content critical to non-Salesforce functions, like HR and Finance. The SpringCM Content tab in Salesforce gives you a holistic view of all the content in SpringCM organized in familiar file and folder hierarchies. Outside Salesforce, SpringCM is accessible through our intuitive web interface.

Organization made simple. In SpringCM you have all the advantages of organizing your content into a folder hierarchy without the work. Once the Salesforce admin determines which Salesforce pages should be associated with folders and subfolders, SpringCM automatically creates the folder structure. And keeps it updated for you as work progresses. Now, when you need to find something, you don’t have to know what Account, Opportunity, Case, or Chatter post the content is attached to.

No content is off limits. SpringCM gives you numerous options for securely adding files. Pick the one that best suits your needs.

- Save to your desktop and let SpringCM automatically sync content
- Drag-and-drop documents from your desktop into SpringCM
- Upload files directly from your desktop or mobile devices
- Upload using FTP (file transfer protocol) services
- Directly email, fax, and scan content into SpringCM folders
- Use your mobile device as a scanner to upload images

Search made simple. SpringCM makes a PDF of every piece of content you upload, whether it’s a Word doc, Excel spreadsheet, PowerPoint deck, or some other type of content, and then automatically processes it with built-in OCR capabilities. This serves two purposes: one, we quickly turn it into an image that makes it easy to preview and, two, now every piece of content you have in SpringCM is full-text searchable. Ask the SpringCM customer who uploaded 60,000 contracts how important that is.

Edit your content in SpringCM. SpringCM provides a number of powerful features for editing your content and keeping it current without leaving Salesforce, including:

- One Click to Edit, which opens the file in its native application and puts it back into SpringCM when you save it
- Version control with check in and check out as well as conflict resolution if two people are editing the same document at the same time
- Document comparison, which creates a red-lined version of the differences between two documents
- Document merge to quickly put different content elements together
- Document split to tailor what you're sending to customers and prospects
- SpringCM Sync, which keeps files current on your desktop or laptop and refreshes your Favorites on your tablet or smartphone

Share content inside and outside the organization.

SpringCM makes it easy for teams to work together with shared project folders, public and private links, automated notifications and alerts, the ability to post comments, and more. Document collaboration in SpringCM is device and platform agnostic: use all the SpringCM collaboration tools from Salesforce, our web interface, your mobile devices, or virtually any web application.

Put content to work with automation. When our Salesforce customers have their content organized, accessible, and shareable, they often ask us to address harder-to solve content problems, such as integration of email and paper and streamlining complex processes like contracts. This is one of our sweet spots, and we do it better than anyone in Salesforce. Our secret sauce: easy to manage Smart Rules, approval workflows, and advanced workflows.

SpringCM File it! app

The SpringCM File it! app is embedded in specific Salesforce pages to give you and your colleagues a secure space to create, share, and work with content relevant to a particular page, such as an Account, Opportunity, or Case. The File it! app ensures that you have just what you need at your fingertips, without combing through non-relevant files and folders.

As you and your colleagues add documents and folders to your File it! app, the content is automatically synced to the SpringCM content cloud. When colleagues outside Salesforce create content in SpringCM relevant to that page, such as a contract, SpringCM automatically syncs it to your File it! app.

SpringCM Get it! app

The SpringCM Get it! app searches for, and dynamically delivers, content specific to fields on a Salesforce page. For example, your Get it! app can deliver content specific to the company you are competing with or the current stage of your Opportunity. As an opportunity advances from one stage to the next, the Get it! app “automagically” delivers the appropriate content for that stage. Marketing is happy that their content is delivered in a timely manner, and Sales is happy that they don't have to waste time searching for the right content.

Would you like to segment the material you deliver into different categories, such as sales tools, customer collateral, and competitive information for quick access? Put multiple Get it! apps on the Salesforce page. The possibilities are endless.



SpringCM is the leader in Content Cloud Services for the enterprise. We deliver clearly more than cloud storage and file sharing—we put content to work. Our applications help global brands and public agencies increase revenues, cut costs, mitigate risk, engage employees, and delight customers.

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