



# Salesforce-Alfresco Integration for Effective Document Management

Case Study

## Customer

The Customer is an IT-consultancy operating in the sphere of cloud and mobile solutions for construction and commercial real estate companies. The Customer provides consulting services on Salesforce, Microsoft Dynamics 365, SharePoint, Office 365, etc.

## Challenge

The Customer commissioned ScienceSoft as a subcontractor to perform the integration of Salesforce CRM with Alfresco Enterprise Content Management (ECM) system for their client.

The Customer's client was using Salesforce Sales Cloud for managing their sales and Alfresco as a system for storing, managing and sharing corporate content like contracts, invoices, proposals, quotes, presentations, technical documentation, etc. The information stored in two different systems made the cooperation between the sales teams and other specialists (technical specialists, marketing specialists and business analysts) ineffective.

So, the Customer's client wanted to make access to all the documents stored in Alfresco available for their sales teams directly in their Salesforce solution.

## Solution

To align Salesforce Sales Cloud and Alfresco, ScienceSoft developed a bridge web application and incorporated it into the end customer's Salesforce solution. The application enabled on-the-fly synchronization, which would allow users to access, view, edit and share documents from Alfresco right in Salesforce Sales Cloud and vice versa. The integration process comprised the following steps:

1. The bridge application received data from Alfresco ECM.
2. The application transformed the data in accordance with the integration rules and sent it to Salesforce solution in an acceptable format.
3. The opposite transformation took place when there was a need to share certain customer-related info from Salesforce with an Alfresco user.

To link Alfresco-based content with a Salesforce record, Alfresco user credentials should be entered in the pop-up window from the Alfresco Repository tab located within a Salesforce user record.

## Results

The end customer got their Salesforce Sales Cloud and Alfresco ECM system integrated via a bridge application. The integration enabled quick access of sales teams to Alfresco-based documents right in Salesforce and enhanced cross-departmental collaboration between sales teams and specialists from other departments.

## Technologies and Tools

Salesforce Sales Cloud, Java, Spring Framework