E-BOOK

Understanding Aavenir's Integration Capabilities with Salesforce

www.aavenir.com

Faster and Intelligent Contract Creation, Reduced Contractual Risks

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Achieve faster sales cycles with Aavenir and Salesforce integration

Executive Summary

Key Issues with CRM and Contract Management Systems That Aren't Integrated

- Instances of duplicate data can arise when data is located on two separate systems
- Finding related contracts within two different systems can lead to bottlenecks
- Lower sales productivity
- Lack of unified signing processes lead to confusion during contract signatures

Salesforce CRM and Aavenir **Contractflow**, both platforms are highly reliable tools for customer management and contract management. Including the contract management function within the overall sales cycle, instead of treating them as two individual processes, helps to resolve the challenges mentioned above.

Aavenir has integrated its **Contractflow** application with Salesforce CRM and has helped customers achieve fast sales cycle and contract lifecycle times.

This document provides an overview of this integration. We have picked two key use cases of CRM and CLM integration that cover both inbound and outbound integration along with the data flow between these systems.

The information provided in this document shall help organizations to understand Aavenir's technical capabilities and experience in the area of Salesforce integration.

Integration Overview

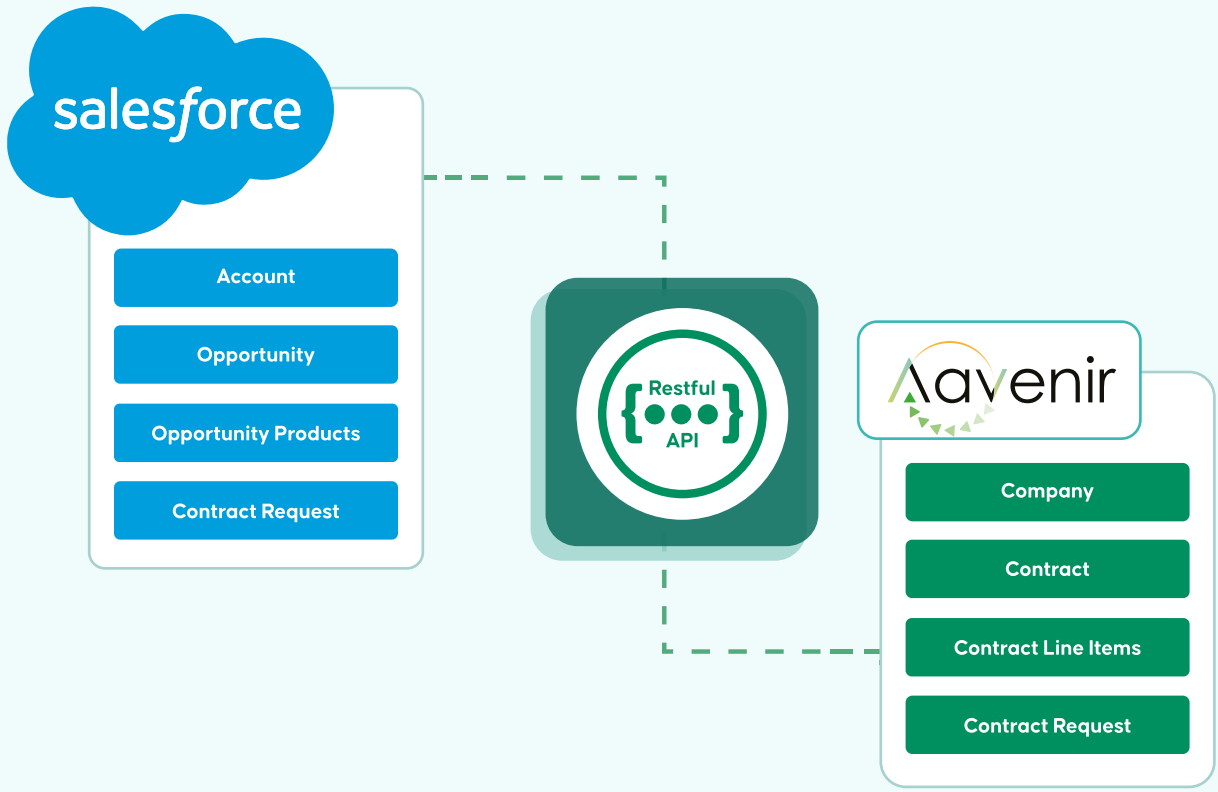


Figure 1 - Salesforce and Aavenir Integration Touchpoints

Aavenir leverages REST APIs technology, capabilities, and security to ensure secure and robust integration to Salesforce CRM. The REST API layer manages all aspects of integration including bi-directional data flow in and out of Aavenir Contractflow application, insert/update/delete of data in the application, and integration configurations such as scheduling and error handling.

The diagram in Figure 1 gives a high-level overview of the data flow in and out of Salesforce and Aavenir through REST APIs.

To keep Salesforce integration reusable and simpler, Aavenir has developed its API structure based on industry-standard protocols. For example, Aavenir has a standard REST API JSON format to send data or receive data to and from Salesforce.

Aavenir provides expertise and assistance in the process of mapping Salesforce data entities with Aavenir data entities. Our integration experts stand ready to ensure smooth and quick integration, during implementation.

Integration Mechanism

Aavenir uses REST API (JSON Format) for integration. API based integration provides the following key technical benefits:

- Real-time transaction processing
- Streaming incremental or delta records
- Data flexibility to handle multiple types of API calls and return different data formats

Aavenir ensures complete protection of your data with a combination of technology and best practices for API-based integration. It uses 'Auth' for Authentication which is an industry-standard protocol supported by ServiceNow as well as Salesforce.

Integration Data Flow

The following two use cases showcase Aavenir's capability to achieve inbound and outbound integration with Salesforce and provide an understanding of Aavenir's integration with Salesforce. Other use cases can also be enabled as needed.

- Accounts-Company Synchronization and Contract Initiation
- Contract Activation and Signed Document Synchronization

I. Inbound Integration Use Case: Accounts-Company Synchronization and Contract Initiation

'Account' in Salesforce is a company you are doing business with. Its counterpart in ServiceNow is called 'Company'.

This use case enables Sales staff to -

- Initiate contract creation in Aavenir Contractflow from Salesforce GUI
- Synchronize Salesforce Account with ServiceNow Company entity along with contract initiation The user doesn't need to explicitly create a Company in ServiceNow against the Account in Salesforce

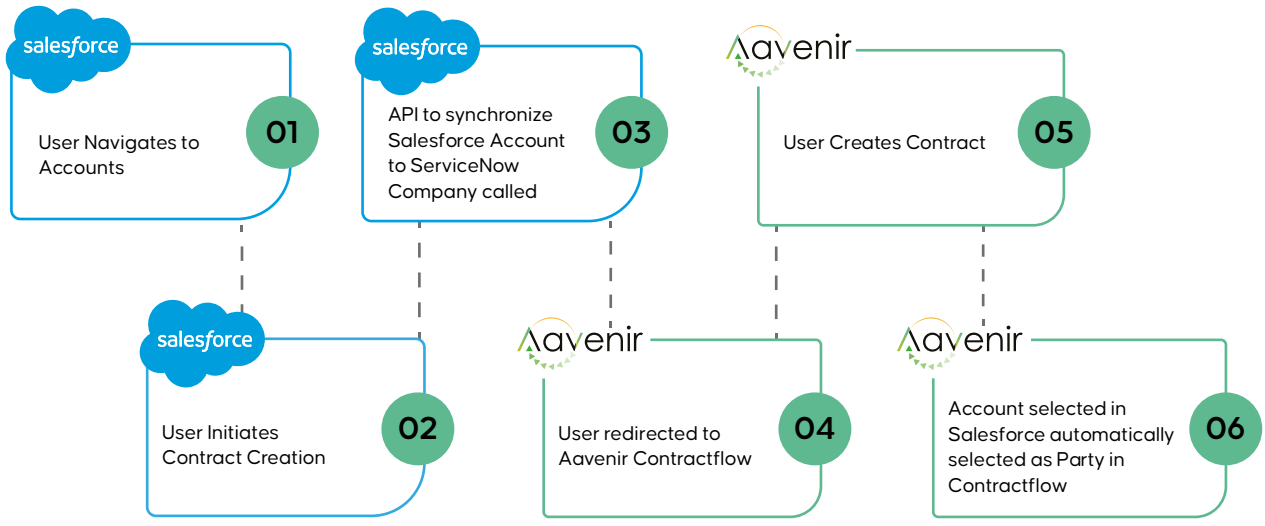


Figure 2 – Account Synchronization and Contract Initiation Flow

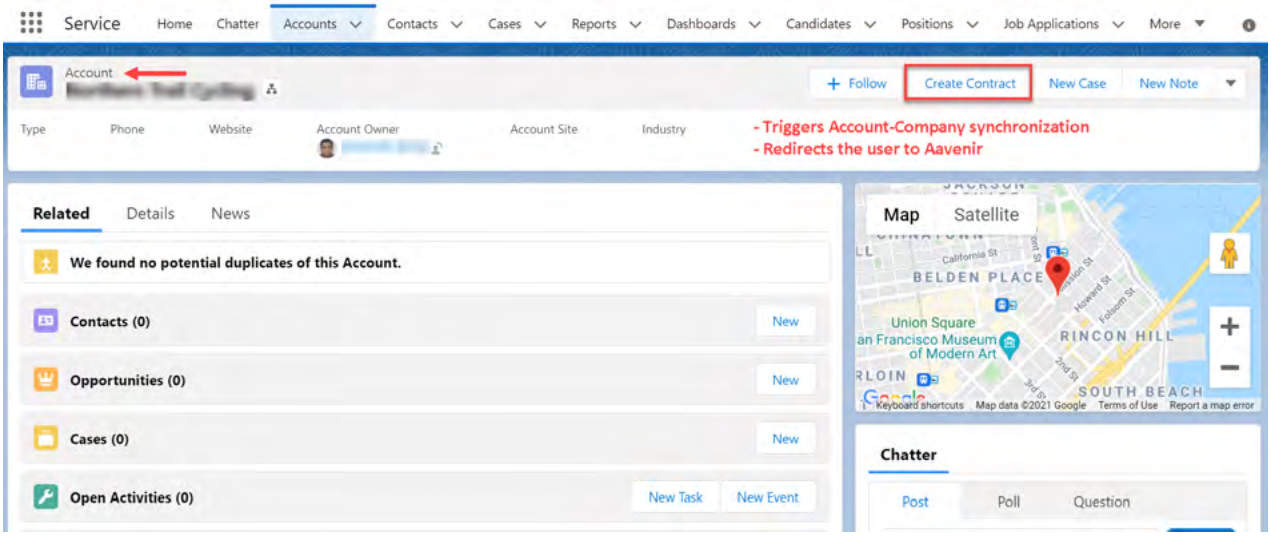


Figure 3 - 'Account' interface in Salesforce

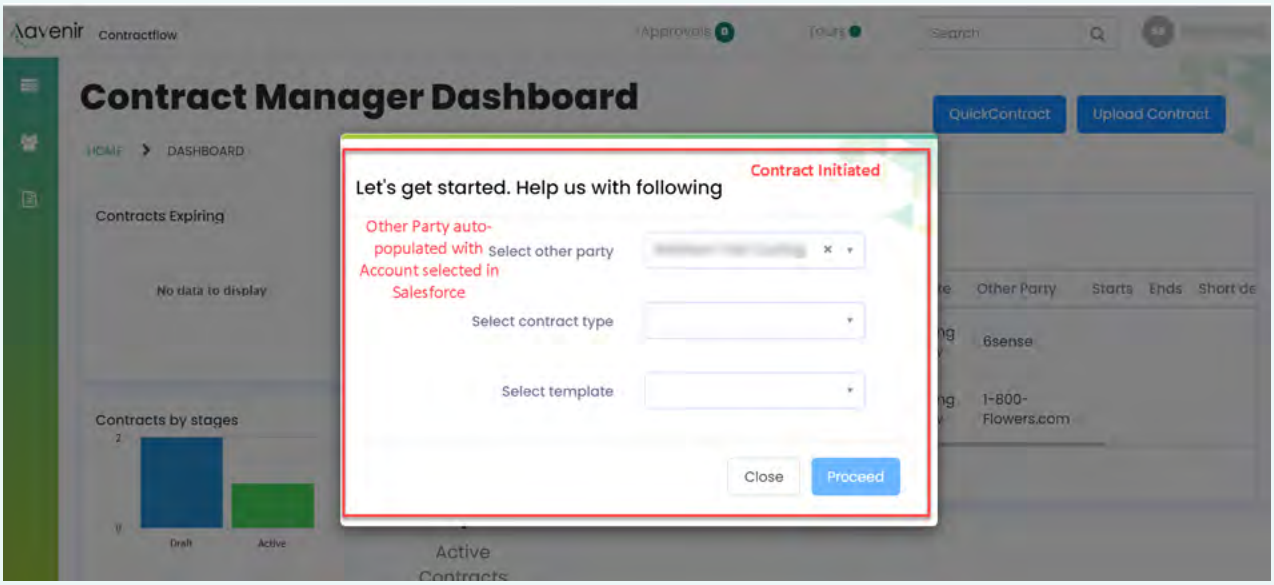


Figure 4: Contract Creation Initiated

II. Outbound Integration Use Case: Contract Activation and Signed Document Synchronization

A contract is activated once the workflow configured for contract review(s), approval(s), and signed contract document (PDF) generation is completed. A rule is triggered when a contract is activated and the signed PDF of the contract document is synchronized to the opportunity record in Salesforce.

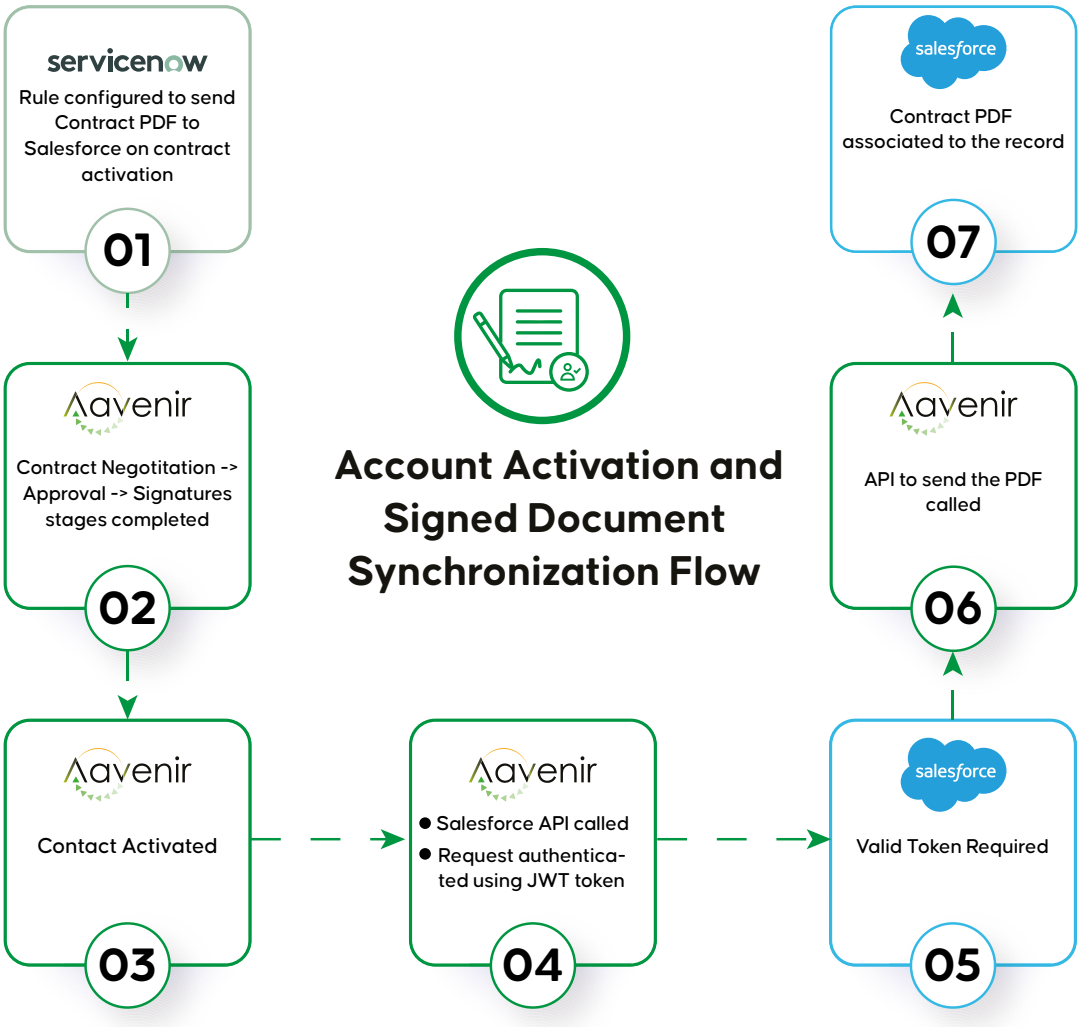


Figure 5 - Account Activation and Signed Document Synchronization Flow

Additional processing such as Change of Opportunity Status, Update of Close Date, etc in Salesforce can also be supported.

Key Takeaways

Aavenir Contractflow and Salesforce CRM integration provide organizations with the following key advantages:



Faster Contract Creation:

Sales professionals can create contracts in Salesforce, with information gathering during the earlier stages such as the quotation process. If the two systems don't interact, the sales team could be duplicating efforts due to a lack of visibility of information gathered previously. This integration helps reduce contract cycle time, re-work, errors and improves customer satisfaction.



Sales User Adaptation:

The integration enables sales personnel to leverage Salesforce's familiar interface and follow a standardized contract process.



Real-time Data Access:

Salesforce-Aavenir integration empowers sales professionals to stay up to date on contracts without leaving the Salesforce application. The user can have quick access to single and accurate data providing better insights.



Reduced Risks:

Chances of human errors are always there when more steps are involved in a process. Integrated systems reduce the risk of redundant data, potential frauds, and manual activities related to contracts.

Explore Key Resources & Get Started

Here are some more resources about Contract Management and Automation that you might find helpful



Datasheet

Aavenir Invoiceflow Integration with ServiceNow ITBM Project Portfolio Management (PPM)

Aavenir Invoiceflow integration with ServiceNow ITBM PPM automatically embeds approved invoice data to the expense line in the cost plan.

Download Now



E-Book

ServiceNow and SAP Ariba Integration

Learn how to integrate SAP Ariba with ServiceNow using integration hub to import vendor information and perform vendor related activities on the Now platform.

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Blog

Contract Negotiation and Redlining using Microsoft Word Plugin

Extend ServiceNow Capabilities with Aavenir Contractflow Microsoft Word Plugin for Contract Negotiation and Redlining for faster and accur...

Read More



Datasheet

Aavenir Contractflow - Contract Lifecycle Management Solution

If your enterprise is already using ServiceNow and you haven't integrated a robust contract management platform, download this brochure ...

Download Now



Datasheet

Aavenir CLM and ServiceNow CLM Legal Services Product

Aavenir CLM and ServiceNow CLM - Aavenir Contractflow uses strong features of the Now Platform such as a secure repository, workflow engine and adds advanced end-to-end CLM features, which make it a unique offering when compared to ServiceNow's legal services product.

Download Now



ROI Calculator

Contract Lifecycle Automation ROI Calculator

Access this easy to use Contract Lifecycle Management ROI Calculator get your ROI in hard numbers.

Calculate Now



Datasheet

Aavenir Contractflow Packages

Download this datasheet to explore all features of Aavenir Contractflow packages.

Download Now



Checklist

CLM Solution Readiness Assessment

Assess your organization's contract lifecycle management process maturity and find out the readiness for CLM solution adoption, with CLM solution readiness assessment checklist.

Download Now

Manage Your Contracts with Aavenir Contractflow

Want to transform your contract management with AI-enabled workflows?

Get a custom demo of the Aavenir software now, and find out how you can manage your contracts for better business outcomes.



About Aavenir

Aavenir offers AI-enabled Source-to-Pay solutions, which includes Aavenir Contractflow – Contract lifecycle management , Aavenir Invoiceflow Accounts Payable Automation, and Aavenir RFPflow – Request for Proposal Management. Aavenir Source-to-Pay solutions revolutionize age-old processes using latest technologies such as Machine Learning and Natural Language Processing to eliminate manual work, reduce cycle time, and offer insightful smart suggestions based on historical data. For more information, visit: www.aavenir.com.

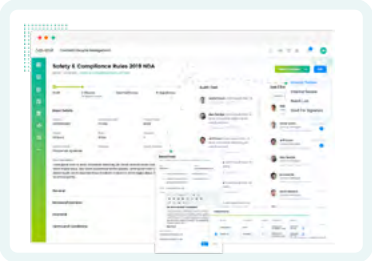
Explore Aavenir Source-to-Pay Solutions on ServiceNow



Aavenir RFPflow

Aavenir RFP/RFI/RFQ management software accelerates the vendor qualification process using milestone-based RFX-to-award workflow and collaborative vendor scoring.

- Create RFP/RFI/RFQ
- Request Responses
- Score Responses
- Award-a-Bid



Aavenir Contractflow

Aavenir Contractflow (CLM) enables enterprises to efficiently create and manage bilateral contracts for procurement, sales, services, legal, NDA, HR or any other type of internal and external enterprise operations.

- Create Contract
- Review & Negotiation
- Approval & E-Signature
- Dashboard & Reports



Aavenir Invoiceflow

AI-enabled Aavenir AP Automation solution learns an organization's unique invoices patterns to simplify invoice-coding, automate invoice data entry, and identifies exceptions to ensure data accuracy.

- Import Non PO & PO Invoice
- Automated Invoice Data Entry
- Invoice Approval Workflow
- Dashboard & Reports

Get Started

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