Solution Guide:
Salesforce.com Integration

INGENIUX

Content beyond boundaries

Salesforce is one of the most popular customer relationship management system (CRM) for Sales, Marketing and Customer Service. Integrating Salesforce with your web experience not only helps Marketing and Sales qualify leads but also provides your customers with more personalized experiences.

Salesforce stores a wealth of information about customers and prospects you can leverage to personalize their experience when visiting your website. As customers interact with your website, reading web pages, filling out forms and downloading content, you can sync this activity with their Salesforce customer profile improving the ability to move a prospect through the lead qualification process or providing Sales and support resources with richer information about the customer's interactions with your company.

Ingeniux CMS integrates with Salesforce CRM to enhance customer experiences in a number of ways, including enhancing and maintaining customer profiles, managing leads, personalizing web experiences and delivering customer self-service.

Technical Overview

Ingeniux CMS is an application for managing and delivering content to websites, portals, applications, and other digital channels. It provides a set of APIs for application integration and supports a wide range of technology standards for integrating applications and data from external platforms such as Salesforce.com and other CRMs.

Ingeniux securely connects to the Force.com API and uses role-based filtration to restrict access to customer records based on user context. Using the Ingeniux integration for Salesforce.com, you can read and update leads and contacts, account data, custom objects, and other objects, such as reports and campaigns.

At a Glance: Salesforce Integration

	Synchronize Profiles & Company Data		Personalize Web Experience with Salesforce Data		Manage Leads between Salesforce and CMS
	Integrated Self-Service Support		Include Salesforce Knowledge in CMS		Integrate custom Salesforce objects in CMS

Key Use Cases for Salesforce.com and Ingeniux CMS Integration

Synchronize Profiles & Company Data

Connect your website visitor profiles to customer profiles stored in Salesforce.com. The connection enables you to enhance your CMS profiles with more detailed customer profile information.

As you update profiles in Salesforce, they are synchronized with the customer profile in the CMS, ensuring you are always using the most recent customer information in your CMS.

You can also export customer information to Salesforce from Ingeniux CMS on a regular basis. This includes customer activity on the website such as pages visited, content downloaded, newsletter sign-ups and searches performed. This information can be very useful to Sales and Support.

If you have multiple visitors from the same organization accessing your website, you can use CRM account data about the organization to personalize each visitor's experience. To do this, you use the Account objects in Salesforce.

Personalize the Web Experience

Personalized web experiences are demanded by customers today. If a visitor has been to your website before, they may expect you to personalize the experience based on past behaviors.

Ingeniux CMS can sync information from Salesforce.com to the Ingeniux Membership Provider and User Profiles. The user profile information enables the CMS to provide a dynamic experience either explicitly based on the user profile or implicitly based on click-stream behavior and other dimensions.

By connecting your CRM to your website, you always have the most recent profile information about the visitor and can tailor the website experience based on what you know about them.

Manage Leads

Your Ingeniux website is a primary channel to reach and engage with customers and prospects. You may create lead forms within your CMS for content downloads, trial registrations or newsletter sign-ups.

When a visitor completes one these lead forms, you send the form data to Salesforce where Sales manage the lead. Ingeniux

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supports the standard Web2Lead interface for Salesforce.com as well as custom lead creation integration using the API.

Syncing the Salesforce customer profile with the Ingeniux customer profile also enables you to provide website lead forms that use progressive profiling – auto-completing some fields in the lead form using already known profile information.

Integrated Support Self Service

Many organizations use CRMs as a case management tool for customer support and service. But giving customers direct access to your CRM for support issues can be an expensive proposition requiring Salesforce portal licensing for each customer or for the number of logins you will require. With Ingeniux CMS, you can connect Salesforce ticketing to retrieve service and support case records for a customer and display that information in an Ingeniux customer support portal.

Customers can view and update recent tickets, add attachments, create new tickets and access other Salesforce-based support services within the Support Portal

and the information is automatically sent to Salesforce. Updates to the tickets are synchronized with the Support Portal so that the customer always has the most up to date information at their fingertips.

Include Knowledge Base Content in the CMS

Salesforce provides Salesforce Knowledge, a series of articles the help customers and customer service agents find answers to common problems or questions. Ingeniux CMS can connect to Salesforce Knowledge via the Force.com API. Once integrated, you can include the knowledge base in searches using Ingeniux InSite Search, or you can provide links to knowledge base articles in content recommendation widgets and display the widgets within the Support Portal's UI.

Integrate Other Salesforce Records

The Ingeniux platform supports integrating any standard or custom Salesforce object into your Ingeniux Customer Support Portal site. This includes common types such as Leads, Opportunities, Contracts, Invoices or custom objects for your specific business processes.

Summary

There's no limit to what you can do on your website or in your Ingeniux Customer Support Portal when you integrate Ingeniux CMS and Salesforce CRM. Leveraging CRM customer information in your web experience enables you to create a more relevant personalized view that can build loyal customer and win new ones. It also enables you to create stronger more detailed profiles in Salesforce that help Sales move prospects through the buyer's journey.

About Ingeniux

Ingeniux is the leading provider of web content management and digital experience software. We enable organizations to orchestrate the entire customer experience from acquisition through to sales to support and service, across any device, application, or website.

We build content management software with an unparalleled focus on the content itself. The Ingeniux CMS is designed to manage and deliver modern websites, customer support portals, online communities, and other customer touchpoints.

We believe in intelligent "structured" content. We design our software to enable content reuse, enable true mobile and multi-channel content delivery, and insightful content discovery. Our unique content-as-a-service capabilities deliver content into web and mobile applications and other key channels.

Ingeniux software is available as a fully managed software service or an on-premise application. Ingeniux delivers unparalleled service and support to customers worldwide.

To learn more, visit us at http://www.ingeniux.com.

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1601 2nd Avenue, Suite 1010
Seattle, WA 98101

info@ingeniux.com
877 445 8228