

## OpenAir Connect for Salesforce.com

### *Pre-built Integration to Streamline Professional Services Operations*

OpenAir Connect for Salesforce.com is a set of pre-built integrations to share valuable information across your PSA and CRM systems, including project, opportunity, client and workspace data. With OpenAir Connect for Salesforce.com, you can create a streamlined flow of information, eliminate double entry and improve operational efficiencies through integrated workflows to increase profit margins, real-time visibility and the number of projects you can manage while decreasing your project cancellation rates.

With OpenAir Connect for Salesforce.com, you can select the integration that's right for you — offering out-of-the-box or more customized options to best meet the needs of your organization. Working with you to prioritize the information and processes that are most important to your business, OpenAir will deliver the integration that best fits your needs.

#### **OpenAir Connect for Salesforce.com: Integration Packages**

**OpenAir offers three options for integrating with Salesforce.com:**

**Silver**—with out-of-the-box integration to meet basic requirements, Silver integration provides unilateral information flow from Salesforce.com to OpenAir and allows you to:

- Share project information with OpenAir, directly from Salesforce.com, at the push of a button
- Map key opportunity and client data to OpenAir, including client name and address, as well as additional data, such as budget information
- Create a unique workspace for each project and synchronize workspace information across members
- Leverage single sign-on across OpenAir and Salesforce.com

**Gold**—with all the standard integration functionality provided by Silver, Gold evolves your OpenAir Connect integration with bilateral information flow and automation, allowing you to:

- Exchange information on both sides, for an advanced, two-way information flow between Salesforce.com and OpenAir
- Automate information flow between OpenAir and Salesforce.com
- Coordinate project template information, including billing rules and approval processes
- Standardize project creation and work breakdown structures across systems
- Create tabs to access OpenAir through Salesforce.com

**Platinum**—for enterprise organizations with complex data requirements, OpenAir can work with you to upgrade your OpenAir Connect experience. Platinum integration includes all the features and functionality provided by our Gold integration, but also addresses the unique needs of your Salesforce.com implementation.

### OpenAir Connect for Salesforce.com: Integration Comparison

|  | Silver     | Gold      | Platinum  |
|--|------------|-----------|-----------|
| <b>Information Flow</b>                  | Unilateral | Bilateral | Bilateral |
| <b>Integration Queue</b>                 | Manual     | Automated | Automated |
| <b>Account / Client Integration</b>      | ✓          | ✓         | ✓         |
| <b>Opportunity / Project Integration</b> | ✓          | ✓         | ✓         |
| <b>Workspace Synchronization</b>         | ✓          | ✓         | ✓         |
| <b>Single Sign On Capability</b>         | ✓          | ✓         | ✓         |
| <b>Project Template Integration</b>      |            | ✓         | ✓         |
| <b>Web Tabs</b>                          |            | ✓         | ✓         |
| <b>Contact Integration</b>               |            | ✓         | ✓         |
| <b>Complex Integration Flows</b>         |            |           | ✓         |

#### **Services Resource Planning (SRP)**

PSA and CRM systems are critical to the success and evolution of any professional services organization. With OpenAir Connect, you can leverage out-of-the-box integrations with leading CRM systems, like Salesforce.com and NetSuite—but the benefits do not stop there. With OpenAir Connect, CRM integration is only the beginning.

OpenAir Connect enables companies of all sizes to expand the benefits of a stand-alone PSA by integrating OpenAir with CRM and financial applications to realize the benefits of Services Resource Planning (SRP). Designed to be vendor-agnostic, OpenAir seamlessly integrates with other solutions you may use by leveraging OpenAir Connect's set of pre-built integrations.

Want to learn how OpenAir Connect can help you gain the benefits of an advanced PSA solution? Contact OpenAir now!

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