

# APIs and Your AMS

## Do You Integrate or Not?

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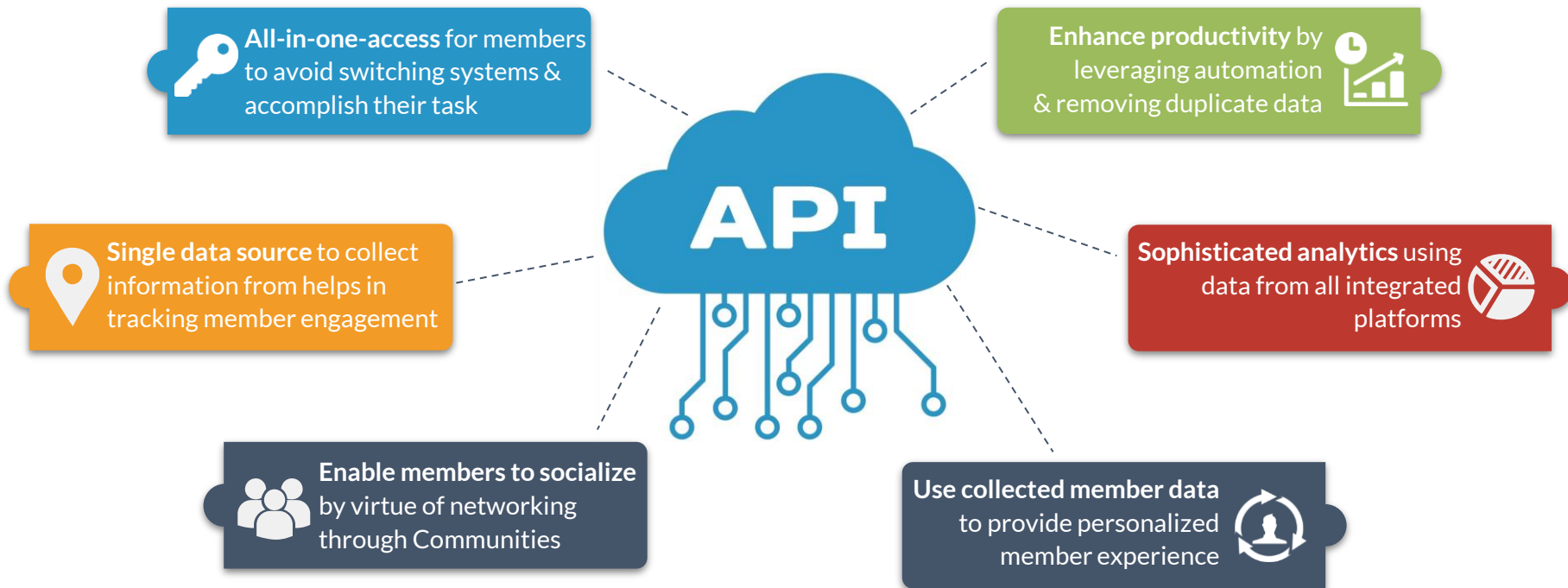
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# Understanding the Organization Landscape



# Why Integrate?

What to expect out of a Salesforce API integration



# AMS-LMS Integration: Benefits Explained



## SINGLE SIGN-ON

Let your members access their memberships as well as courses without switching platforms, using Single Sign-On

## ENHANCED MEMBER ENGAGEMENT

Membership team can measure member engagement by individual or company. Conference team can spot topics of interest.

## SOCIAL LEARNING EXPERIENCE

Enable members to connect with peers, network & learn via Salesforce Communities

## PERSONALIZED COURSE RECOMMENDATION

Members get to see what's next in their learning journey based on previously completed courses (via AI)

## BETTER

## MARKETING ANALYTICS

Track impact of course participation on membership status & engagement

- Do guest learners join at higher rate?
- Do learners participate in other activities at a higher rate?

# LMS Integrated Dashboard

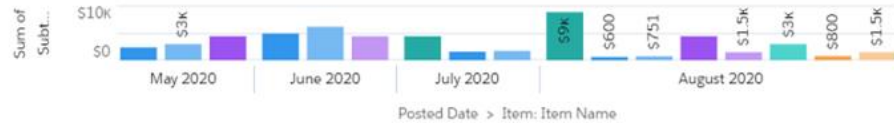


All Search...



Membership Home Contacts Accounts Sales Orders Memberships Reports Community Groups Dashboards Exporters Webinar

## Monthly Revenue by Course



Item: Item Name CORONA Virus Awareness Program Digital Marketing Dynamics Materials Science Calculus

[View Report \(Monthly Revenue by Course\)](#)

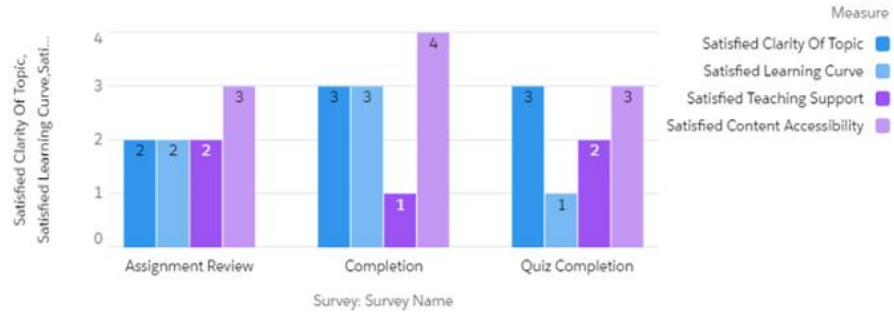
## Yearly Revenue by Course



Posted Date FY 2021 FY 2020

[View Report \(Yearly Revenue by Course\)](#)

## Survey Report



[View Report \(Survey Report\)](#)

## Course Enrollment



[View Report \(Course Enrollment\)](#)

# How to Determine If You Should Integrate

5 questions to help you make the right decision



Are you equipped with the technical skills to perform a seamless integration?



Does your app have an API that connects with Salesforce?



Are you seeking analytics beyond the scope of Salesforce & your AMS?



Are you wasting a chunk of your time in syncing data between AMS & apps?



Do you want to use the same technology for the next 3-5 years & investing in integrations is worthwhile?

# 3 Scenarios While Syncing Data

## Data only in AMS (Fonteva)

This will happen when AMS is already in use you have just integrated with an API

## Data only in app

You are already using an app and have just implemented Salesforce

## Data both in Salesforce and the app

Both in use but are silo systems



Aplusify Recommended

# Salesforce API Integration Tips

## Get a buy-in from business users

Firstly, evaluate the need to integrate and get it approved by the stakeholders and business users.

## Test your integration

Carry out rigorous user acceptance and unit testing before going live with the integration.

## Take into account the custom configurations that you made in Salesforce

When setting up your API integration, consider the changes in your Salesforce system like workflow rules, custom objects, etc.

## Perform Data Health Assessment & Cleansing on both the systems prior to integration

Look through your Salesforce instance to identify bad data in the system and rule them out to reduce data silos.

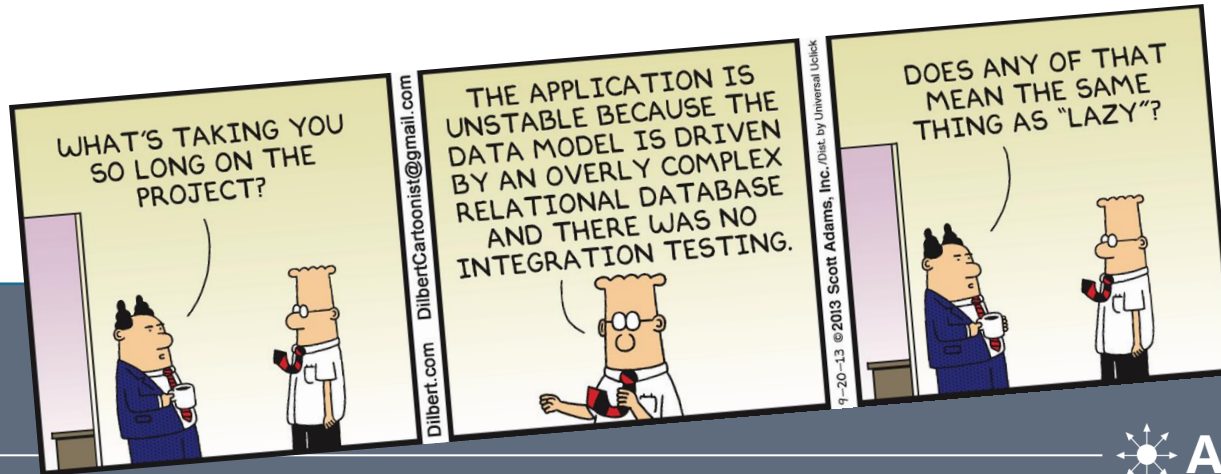
## Train staff users

Train your staff users on how to efficiently use the integration and make the most out of the investment.



# API Integration Project Pitfalls to Avoid

- ⚠ Starting a project with no clear scope
- ⚠ Custom configurations not taken into account
- ⚠ Propagation of bad data
- ⚠ Improper field mapping
- ⚠ Professional Salesforce Experts not involved



# Contact Us

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