Introduction

BrainStorm provides turnkey solutions to automate common workflows in the BrainStorm platform that may be triggered via Salesforce. These include:

- Customer Account Creation
- User Account Creation
- User Activity Reporting

A detailed description for the above can be found under the Integration Details & Deliverables and diagrams located under Appendix A.

1. Purpose and Objective

The purpose of this document is to provide a detailed summary of BrainStorm's Salesforce integration and ensure all parties have a shared understanding of the expectations, responsibilities and deliverables.

2. Integration Details & Deliverables

- **Prerequisite:**
    - **Salesforce Package:** To configure a Salesforce integration with BrainStorm, your organization's Salesforce administrator should install a custom package by following the steps described on our support site.
    - **Authentication Method:** BrainStorm supports several authentication methods for customers to access the BrainStorm platform. Your organization should specify which (one) of the below BrainStorm should be used during the Customer Account Creation process:
    - **Magic Link:** Users receive access via time-based link sent via email.
    - **Password:** Users must specify a password and re-enter upon login.
    - **Single Sign-On (SSO):** Utilizes an authentication process that allows access to multiple applications using a single set of login credentials.
- **Customer Account Creation:** The customer account creation workflow is triggered by a predetermined field in Salesforce and will result in the following:
    - A customer account will be created (if none exists) in the BrainStorm platform
    - The appropriate content will be enabled via pack(s) and or template(s)
    - The content expiration date will be set for the corresponding packs
    - A primary contact/account administrator will be added to the BrainStorm platform.

The following information is needed to trigger this workflow via Salesforce:

1. Salesforce information Needed
2. Field Name
3. Salesforce Field Value

BrainStorm must be able to make a direct correlation between the field triggering the account creation event and the customer's name, customer ID, primary contact name and primary contact ID, without the development of additional middleware.

Additional information is required from your BrainStorm tenant to enable and prioritize the appropriate content.

Templates
BrainStorm templates allow you to manage content, experiences, and prioritization for all customers from your account. Packs may be added directly to templates and can be changed at any time. The following information should be provided when leveraging templates in BrainStorm:

Packs
Packs are a grouping of flows and other content. Packs may be visible in the BrainStorm Marketplace and may be directly enabled for your customers. The following information should be provided when packs are enabled directly:

1. Pack ID(s)

2. Pack Name(s)
3. Expiration Date(s)

We encourage you to speak with a BrainStorm specialist to establish the appropriate template and pack strategy.

- **User Creation:** BrainStorm requires that a primary contact is added at the time of customer account creation. Additional contacts may be added to an account at any time using a predetermined contact field in Salesforce. The user creation event in Salesforce can also automate workflows within the BrainStorm platform and trigger/prioritize learning experiences for users as they are added.

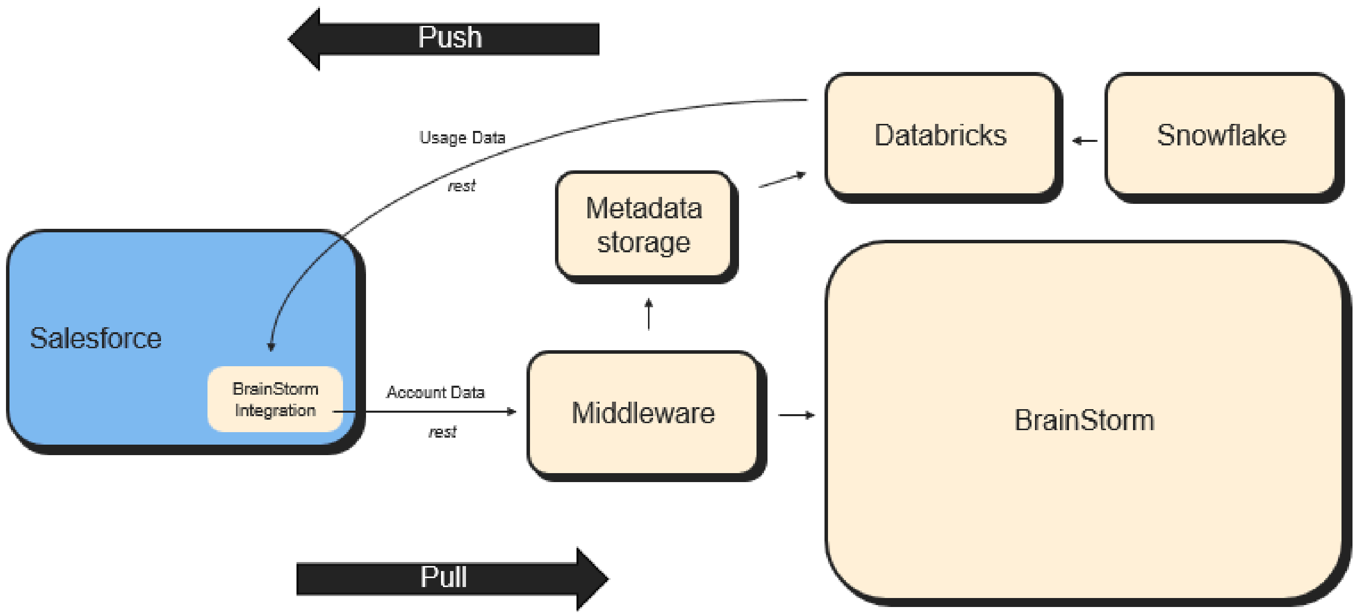
Flow Prioritization

The following information should be provided when flows should be prioritized:

1. Flow ID(s)
2. Flow Name(s)
3. Priority Level(s)
4. Due Date(s)

- **User Activity Reporting**: BrainStorm provides daily data via Salesforce custom objects and returns the following data:
    - **Account Link**: A hyperlink to a customer's BrainStorm tenant.
    - **Customer ID**: The unique customer identifier in BrainStorm.
    - **Start Date**: The start date is determined by when a customer begins the onboarding process/appropriate flow in our platform.
    - **End Date**: The end date is determined when a customer completes the onboarding process/appropriate flow in our platform.
    - **Flow ID**: The unique flow identifier in BrainStorm.
    - **Flow Title**: The name of the flow in BrainStorm.
    - **Flow Status**: The flow status indicates a user's flow progress. It returns Not Started, In Progress, or Completed based on their interaction.
    - **Total Assets**: The count of assets in the flow.
    - **Completed Assets**: The count of completed assets in the flow.
    - **Last Activity Date**: The last activity date (of a user) for a flow. This is the date of the last completed asset by flow/flow ID.
- **Inclusions**
    - Consultation on Template & Pack strategy
    - User authentication based on an established authentication method
    - Development to support a:
        - Singular workflow (which may include multiple Packs and or Templates) may be triggered based on an account creation event.
        - Singular workflow (which may include multiple Flows) may be triggered off a user account creation event.
- **Exclusions & Change Request Procedure**
    - Work that falls outside of the Integration Details & Deliverables is considered a change request and will be billed at an hourly rate of $250/hr.
    - Both parties shall formally agree to any change requests, timelines and the estimated cost of changes prior to development work beginning.

Salesforce Integration—Technical Diagram


Push
Usage Data
rest
Databricks
Snowflake
Metadata storage
Salesforce
BrainStorm Integration
Account Data
rest
Middleware
BrainStorm
Pull