

UNIVERSITY OF TARTU
Faculty of Science and Technology
Institute of Computer Science
Computer Science Curriculum

Ehar Kala

An Integrated User Interface for a Contract Life-cycle Platform: The Case of Salesforce and Avokaado

Bachelor thesis (9 EAP)

Supervisor: Mohamad Gharib

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Abstract

An Integrated User Interface for a Contract Life-cycle Platform: The Case of Salesforce and Avokaado

Abstract: Salesforce, BambooHR, Google Drive, Personio, and Pipedrive platforms contain a high amount of information about customers, sales opportunities, and more. Companies that use Avokaado for their contract lifecycle management often use data from those platforms to fill in their documents. Doing that manually wastes tons of work hours and, therefore, money. Automating this process allows the creation of template configurations that automatically fill data into documents and update it when needed, thus saving countless hours for all companies using Avokaado. The outcome of this Thesis is a successful, and scalable implementation of an integrated Salesforce User Interface that leverages data abstraction and eases future development.

Keywords: Integration, smart, document, Avokaado, general

CERCS: P175 Informatics

Integreeritud kasutajaliides dokumendihaldus platvormile: Salesforce ja Avokaado

Lühikokkuvõte: Salesforce, BambooHR, Google Drive, Personio ja Pipedrive platvormid sisaldavad suures koguses andmeid kasutajate, müügivõimaluste ja muu taolise kohta. Nendel platvormidel olevat infot kasutavad Avokaado kliendid dokumentide täitmiseks. Selle käsitsi tegemiseks kulub rohkelt töötunde ja seeläbi ka raha. Integratsioonid võimaldavad luua dokumendimallidest seadistusi, mis automaatselt täidavad dokumendid vajaliku infoga ning vajadusel uuendavad neid. See võibab kõigile Avokaado klientidele rohkelt töötunde. Lõputöö tulemusena valmib edukas ja kergesti laiendatav Salesforce kasutajaliidese implementatsioon, mis lihtsustab järgmiste integratsioonide implementeerimist.

Keywords:

Integratsioon, tark, dokument, Avokaado, genereeriline

CERCS: P175 Informatics

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