

Salesforce Integration

Connect your CRM to your response process

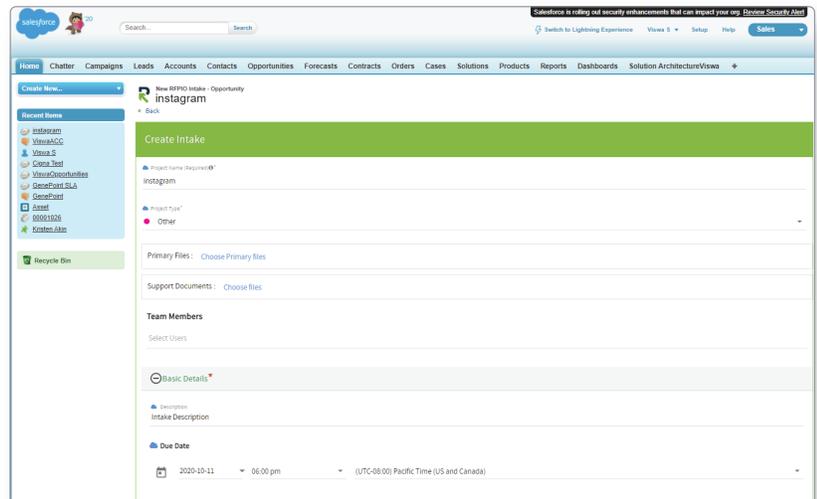


Your revenue teams are already rocking in their CRM. Keep the momentum going by extending proposal operations into the platform where your sales teams are already working: Salesforce! Align your sales and proposal teams by integrating workflows—and empower your sales team to launch and track responses to RFPs, RFIs, and Security Questionnaires directly from Salesforce.



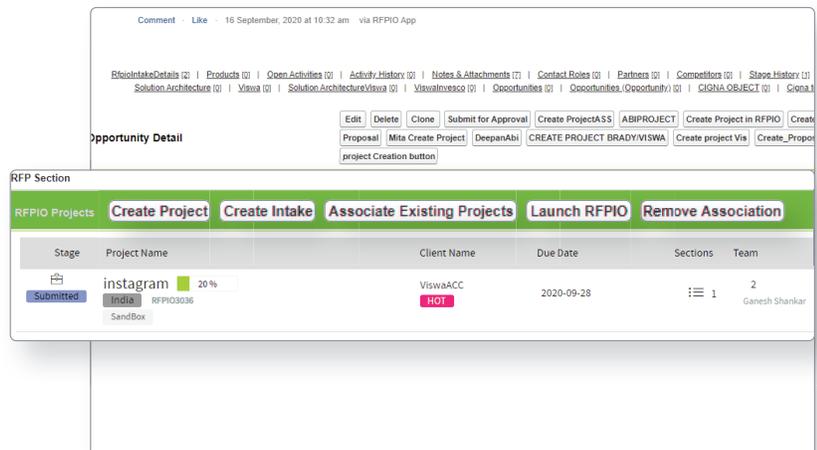
Capture RFP and bid requests directly from Salesforce

Sales teams can launch projects and track progress without leaving Salesforce, and can leverage existing client, opportunity, and product data in Salesforce to expedite the project creation process.



Analyze and qualify project requests

Intake creates a staging area for proposal managers to review RFP project requests submitted by sales teams. Reps can upload supporting documents to their Intake Requests; after submitting, the requests trigger a notification in RFPIO. Requests can also be auto-populated with existing client/opportunity data.



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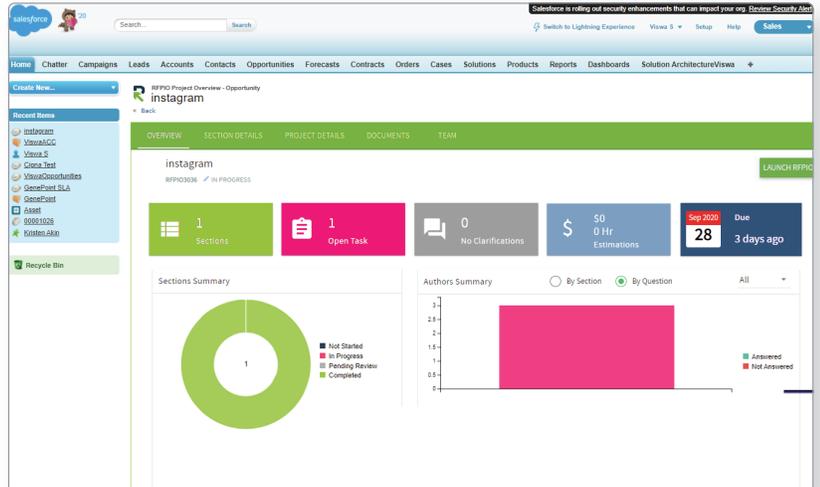
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DATASHEET



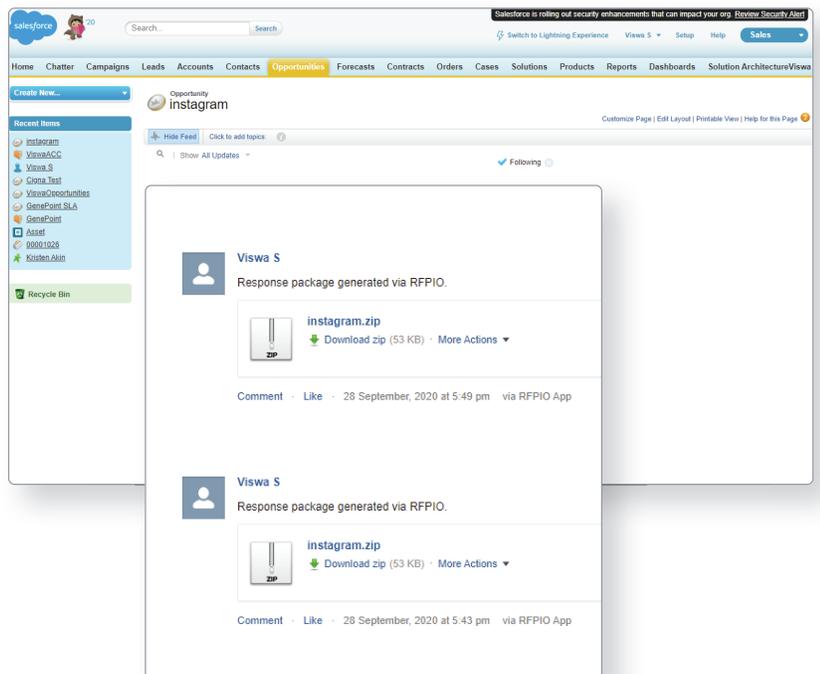
Keep track of project status

When RFPIO Projects or Intake Requests are kicked off in Salesforce, the project status can then be viewed from related Salesforce Opportunity, Lead, or Account Pages. Project creators/requesters can see the acceptance status, progress to completion, and main points of contact managing the project.



Publish completed RFPIO packets back to Salesforce

When RFPIO projects are complete, response packets and related documents can be automatically published back to Salesforce under any client or opportunity page. Anyone with access to the Salesforce page can easily download the file to be sent to the end prospect or customer.



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Build personalized proactive selling docs

Salesforce Proposal Builder lets you get ahead of the competition by accompanying prospect interactions with personalized selling documents. Map RFPIO fields with Salesforce product and client fields to intelligently assemble content templates into personalized proactive selling documents—using pre-approved, up-to-date content.



Access in-depth reporting & analytics

Couple RFPIO's enterprise-friendly Custom Reporting with Salesforce Reports Builder to fine-tune proposal operations, measure the value RFPIO brings to revenue operations, and illustrate how RFPIO content is consumed across the organization.

ViswaProcoreTest
Report Generation Status: Complete
Report Options:
Summarize information by: Type Show: All rfpiodetails
Time Frame: Date Field: Archived Date Range: Custom From: To:
Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe
Grouped By: Type Sorted By: Type
Type: Existing (28 records)

Created Date	Project Name	Rfpio Details	Project Owner	Project Stage	Account: Account Number	Record Type	Opportunity Id: PicklistView
4/5/2020 5:17 pm	ViswaOpportunities	RFPIO_5eb000c261667874pc593783	ganesh@rfpio.com	Needs Analysis	-	Opportunity	-
27/8/2020 1:56 pm	ViswaOpportunities	RFPIO_51476e4d8e108c766aac4e8	balaji.s-test2@rfpio.com	Needs Analysis	-	Opportunity	-
14/8/2020 7:46 pm	ViswaOpportunities	RFPIO_5f369cd3121aa600c7b182c	ganesh@rfpio.com	Needs Analysis	-	Opportunity	-
27/2/2020 6:33 pm	ViswaOPP	RFPIO_5ef0db3ed89863722e9e4277	abinaya@rfpio.com	Needs Analysis	-	Opportunity	-
13/7/2020 8:11 pm	ViswaOPP	RFPIO_50c7298878e7050a2a09aa2	ganesh@rfpio.com	Needs Analysis	-	Opportunity	-
28/5/2020 6:55 pm	ViswaOpportunities	RFPIO_5ecfba726c2a3559e899272	msunara@rfpio.com	Needs Analysis	-	Opportunity	-
15/5/2020 1:58 pm	ViswaOpportunities	RFPIO_5eba52acdbaad12b4a65da0	ganesh@rfpio.com	Needs Analysis	-	Opportunity	-
15/5/2020 11:41 am	ViswaOpportunities	RFPIO_5eba329d03615b4209666e	ganesh@rfpio.com	Needs Analysis	-	Opportunity	-
15/5/2020 1:25 pm	ViswaOpportunities	RFPIO_5eba4eadbeaad12b4a65da0	ganesh@rfpio.com	Needs Analysis	-	Opportunity	-
15/5/2020 1:57 pm	ViswaOpportunities	RFPIO_5eba527ed0beaad12b4a65da0	ganesh@rfpio.com	Needs Analysis	-	Opportunity	-
18/5/2020 4:47 pm	ViswaOpportunities	RFPIO_5ec28ed27b3d7a81164fa766	ganesh@rfpio.com	Needs Analysis	-	Opportunity	-
18/5/2020 5:11 pm	ViswaOpportunities	RFPIO_5ec2744e2f5e887107bb68cb	ganesh@rfpio.com	Needs Analysis	-	Opportunity	-
14/5/2020 4:35 pm	ViswaOpportunities	RFPIO_5ebd2f6d03615b4209666e	viswanathan@rfpio.com	Needs Analysis	-	Opportunity	-

"RFPIO's Salesforce integration is helping our business be more efficient and organized with RFPs and RFIs. We can easily view insights and progress with every RFP, right from Salesforce."

-Alison Moeller, Team Lead, RFP & Sales Enablement

