



upland Qvidian



Extending Qvidian through Salesforce Integration

*Achieve **even greater** levels of operational
consistency, efficiency, and quality*

Your presenter...



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- + 4 + years at Qvidian helping Upland Qvidian customs implement Qvidian Solutions
- + 25+ years in software technology,
- + 10+ with CRM

45 minutes from now, you will know...

- + **Why** you should take advantage of Qvidian's out-of-the-box integration with salesforce.com.
- + **How** you can make the integration happen, and the ease with which integration is achieved.
- + **What** the integration looks like for your user community, its features and benefits.

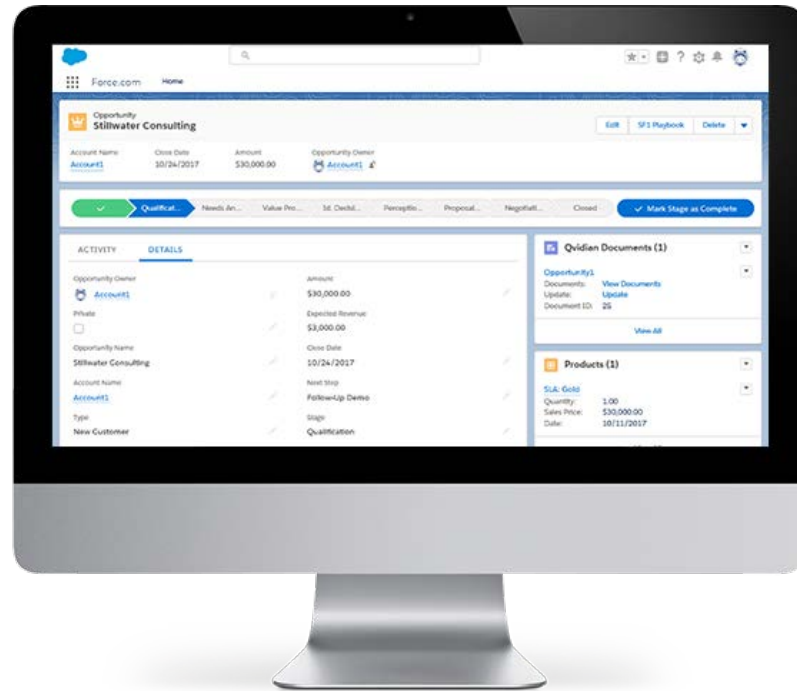


Why integrate Qvidian with salesforce.com?

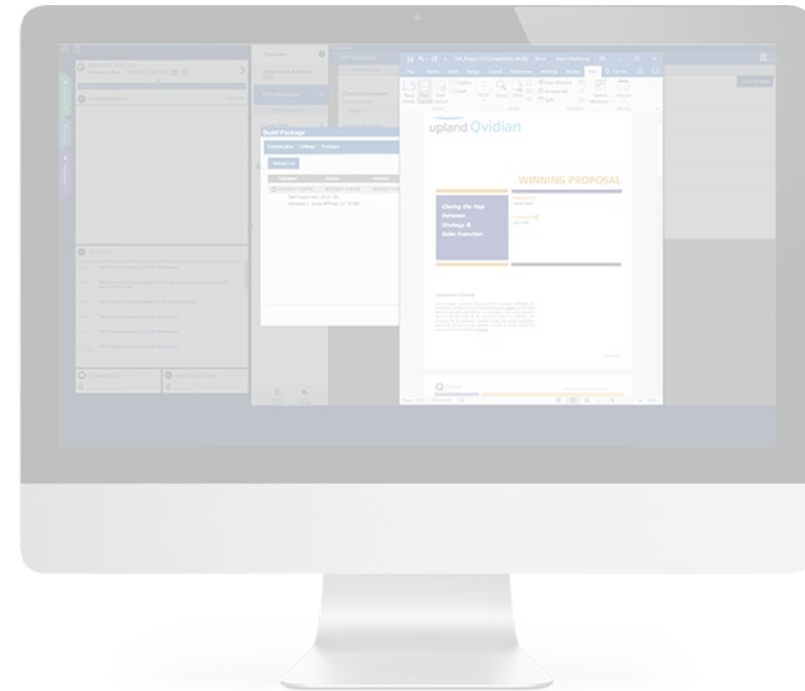
- + Operational **consistency**.
 - + Stickiness with senior stakeholders.
- + Drive **adoption**.
 - + Stickiness with user community.
- + User **efficiency**.
 - + For users, admins and leaders.
- + Business **intelligence**.
 - + Supercharge your reporting.
- + Build **influence**.
 - + Elevate the proposal team.



Presentation

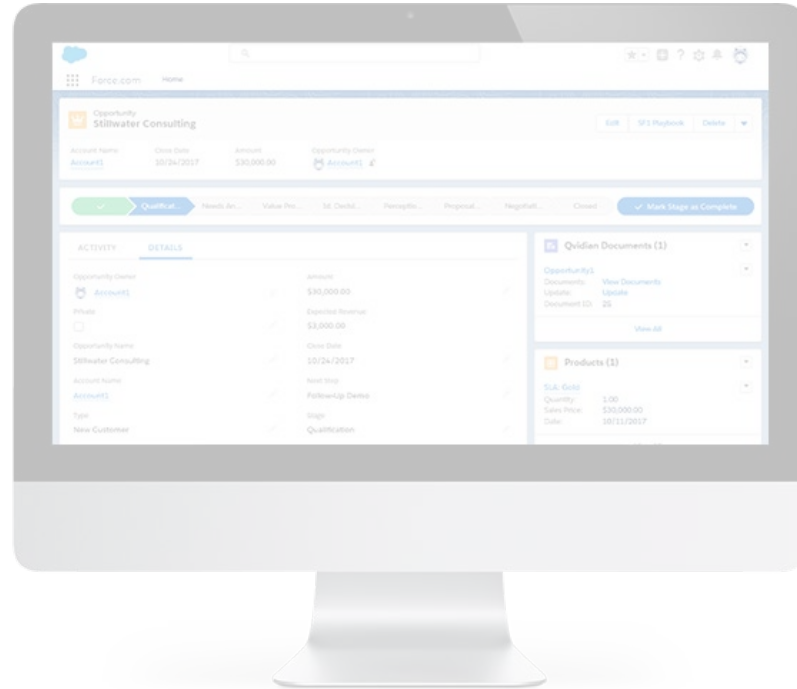


Integrating salesforce.com
with Qvidian Projects

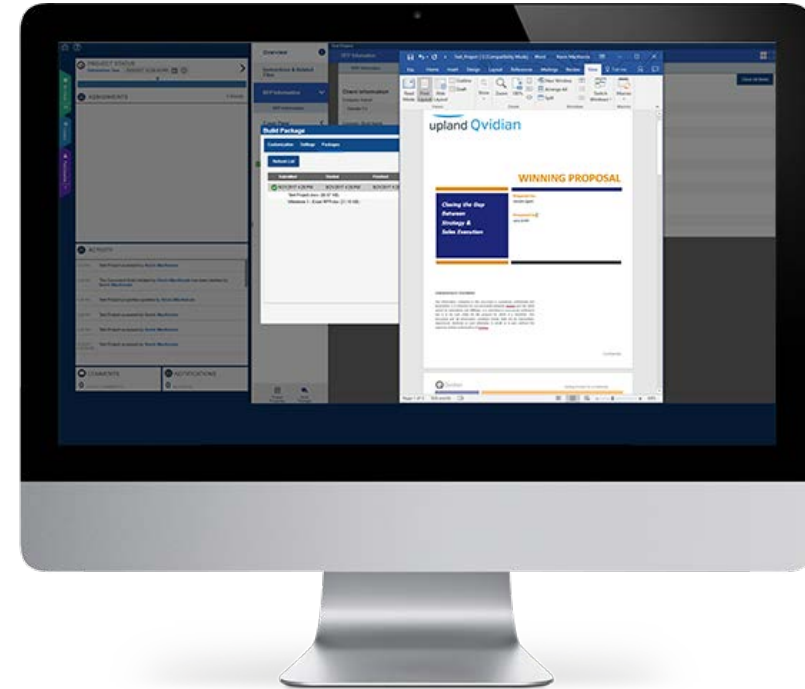


Integrating salesforce.com
with Qvidian Documents

Presentation



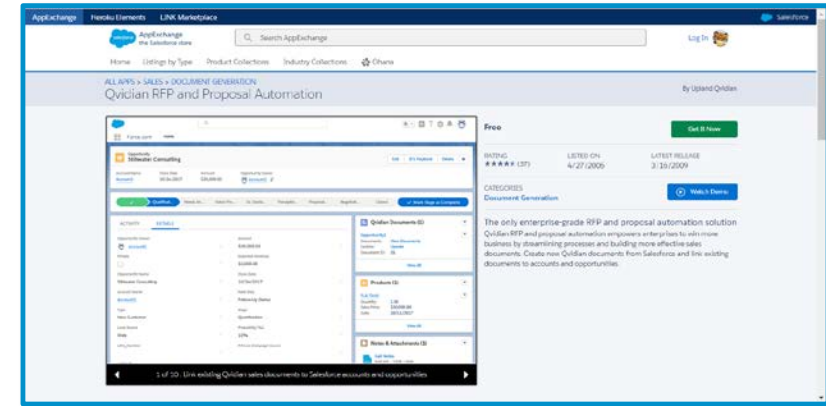
Integrating salesforce.com
with Qvidian Projects



Integrating salesforce.com
with Qvidian Documents

How to make integration happen

- + Socialise with your salesforce.com business owner or champion.
- + Enlist the support of your sales operations leadership.
- + Request the package via the salesforce AppExchange.
- + Engage Qvidian Consulting Services.



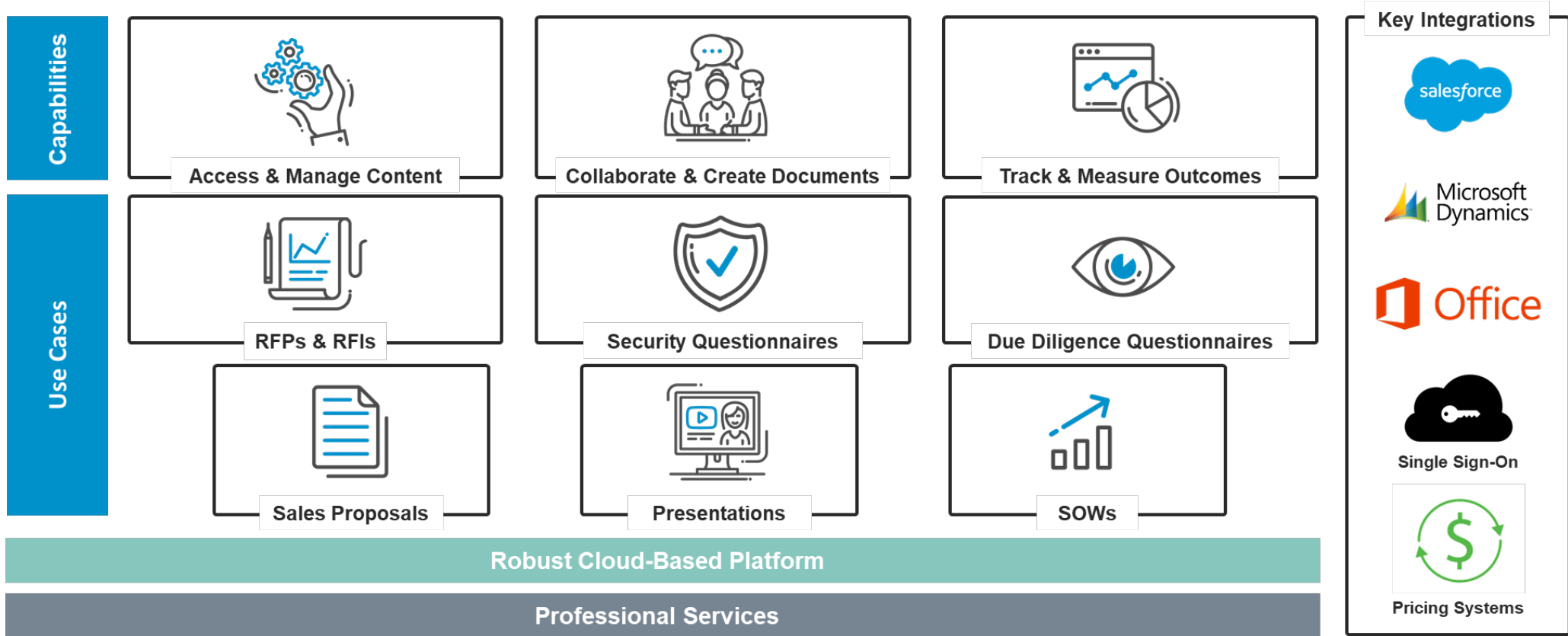
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Technical Services

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What integration looks like, features and benefits

FEATURE	BENEFIT
Access Qvidian projects linked to an account, opportunity or contact directly from within Salesforce	Drive operational efficiency while supporting governance, compliance and audit requirements
Synchronisation of data between salesforce and Qvidian projects - access some of this in analytics	Create new streams of valuable business intelligence: sales pushing data vs. you pulling data
Control the Qvidian document types, populate merge codes, preselect items in selection lists	Use Salesforce data points (and sales team hygiene) to drive Qvidian content decisions
Quick and simple AppExchange installation to create the Qvidian-related lists and buttons	Easy for your IT and salesforce admin to action, with no recurring fees to sustain integration
Eliminates the task of users re-keying any data that is already stored in Salesforce	Increase efficiency and effectiveness with fewer key strokes, less scope for error
Available for both Salesforce Classic and Salesforce Lightning Experience	Start today with classic Salesforce and be ready for the next level in CRM

Qvidian Proposal Automation Platform





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