INSTALLATION GUIDE

RFPIO-Salesforce Integration

This guide will give you the foundation to integrate and use your RFPIO instance with your Salesforce org

RFPIO

Installing the RFPIO App in Salesforce

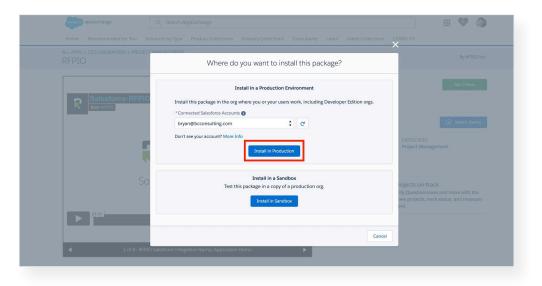
To install the RFPIO App from the Salesforce AppExchange:

 Search "RFPIO" in the Salesforce AppExchange and select the RFPIO App. Click Get It Now.

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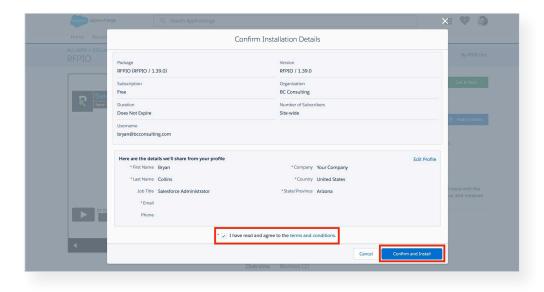
2. If you haven't done so already, log in to **Salesforce** using your credentials. Click **Install** in **Production**.

Note: The integration will not connect with your RFPIO account if installed in a Sandbox.



Continued on next page.

3. Check the terms and conditions box, then click **Confirm and Install.**



4. Select Install for All Users, then click Install to install the package.

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App Name RFPIO	Publisher RFPIO Inc.	Version Name RFPIO		Version Number	

5. A confirmation message will appear. Click Done.

By RFPIO Inc.	
Installation Complete! Done	

Managing the RFPIO Package in Salesforce

Once the app has been installed in Salesforce, it can be managed under **Setup > Apps > Packaging > Installed Packages**. Click on the RFPIO package name to manage it.

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Here you can uninstall the package, and view its components and dependencies, as well as view additional details about the package.

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Adding RFPIO to Page Layouts in Salesforce

Once installed, RFPIO can be added to Opportunities, Leads, and Accounts page layouts. For example, to add RFPIO to the Opportunity page layout:

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Optimizer	Launch an AI-powered bot to automate your digital channels.	Use the Mobile Publisher to create your own branded mobile app.	Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
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1. Go to the **Object Manager** under **Setup.**

2. Search for and select the **Opportunity** object from the list.

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3. Go to Page Layouts and click the Opportunity Layout.

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4. A new section must be added to allow RFPIO to be shown in Opportunities. In the Opportunity Layout options, select **Fields**, then drag a **Section** anywhere on the Opportunity Layout.

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5. Once added, you will be prompted to set up the section properties. We recommend naming the section something like **RFPIO Projects** and setting the layout to 1-Column. Click **OK**.

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6. Next, in the Opportunity Layout options, select **Visualforce Pages**, then drag **RfpioOpportunity** to the section you just created. Select the Opportunity object from the list.

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7. Click **Properties** (i.e. the wrench icon) on the right side of the RFPIO section.

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8. Set the height to 500 pixels. This is the optimal setting to view RFPIO projects in Salesforce. Click **OK**.

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9. When finished, click **Save** to save the layout.

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Working with Projects on Object Records in Salesforce

With RFPIO added to object page layouts (e.g. Opportunities, Leads, and Accounts), you can now log in to RFPIO from the respective page and associate projects with object records. First, to log in to RFPIO, and in this example, from an Opportunities record detail page, follow the steps below:

1. Go to one of your apps in Salesforce (e.g. Sales), then click on the **Opportunities** tab.

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2. Select an Opportunity, then click on the **Details** tab.

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3. Scroll to the RFPIO Projects section and click **Connect to RFPIO**.

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Going forward, be sure that you are logged in to RFPIO when creating a new project through Salesforce.

RFPIO-Salesforce Integration

- 4. Once logged in, you have several options for working with projects on object records:
 - e. Create Project: create a project and associate it with the record
 - f. **Associate Existing Projects:** locate existing projects within your RFPIO instance(s) and associate them with records
 - g. Remove Association: remove associated project(s) from a record
 - h. Launch RFPIO: launch the RFPIO application in a separate tab

Sales	Home Opportunities	→ Leads → Task		Accounts 🗸 (Contacts 🗸 Campaigns 🗸	Dashboards 🗸	Reports 🗸	Chatter Groups V Mo	🏚 🌲 👼
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V RFPIO Proje	ects					0	Partners (0)	
RFPIO Project Select Compan Mack Inc. T	y	Create Project Associa	te Existing Projects Re	move Association	aunch RFPIO	2	Stage Hist	ory (2)	
Stage	Project Name		Client Name	Due Date	Sections	Prol	ge: punt: pability (%): ected Reve	Qualification \$15,000.00 10% \$1,500.00	
Draft	ABC USA US Proposal Library		RFP	01.17.2021	i≡ 17 ₤ 1 Jeffrey Miller	Clos	se Date:	9/22/2015 Bryan Collins 10/19/2020, 4:57 AM	
						Prol Exp Clos Last	ount: oability (%): ected Reve se Date:	Qualification \$15,000.00 10% \$1,500.00 8/27/2020 Bryan Collins 10/19/2020, 4:57 AM	
						_		View All	

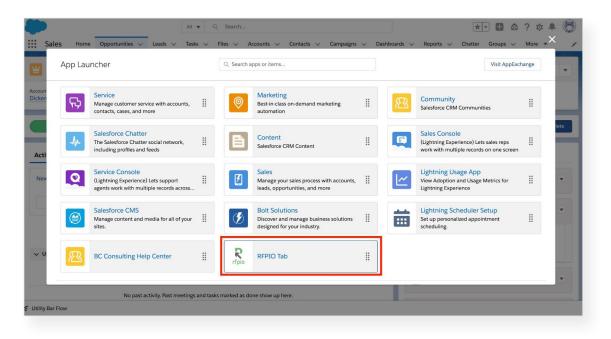
Viewing All RFPIO Projects in Salesforce

To easily view all your RFPIO projects within Salesforce, go to the RFPIO Tab app:

1. Select the app menu and click **View All**.

Sales Home Opportunities V	Leads 🗸	All	Accounts	Contacts	Campaigns ∨ Da	shboards 🗸	Reports 🗸	Chatter Groups		6
Q. Search apps and items							+ Follow	New Case New	Note Clone	-
Apps										
Service	ount 5,000.00	Opportunity C								
Marketing			-	25 MILL MILL NO. 1		2/////////		1000		
🙉 Community	s Analysis	Value Propositi	Id. Decision M	Perception An	Proposal/Price	Negotiation/	R Clos		rk Stage as Complete	
Salesforce Chatter	s Analysis	value Propositi	Id. Decision M	Perception An	Proposal/Price	Negotiation/	R Clos		TK Stage as Complete	
Content										
Sales Console						Re	elated			_
Service Console	Email									
View All	Ernall						Products (0)		
	С	reate a task			Add] Notes & At	tachments (0)		
				Filters: All time • All a	ctivities • All types					
				Refre	sh • Expand All • View A	ui l				
✓ Upcoming & Overdue								Or drop files		
		No next steps.								_

2. Locate (or search for) and select the **RFPIO Tab** app from the App Launcher.



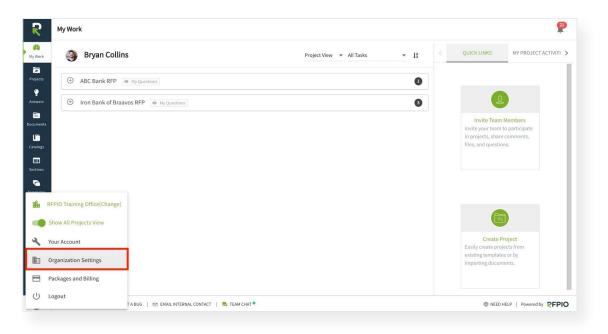
3. Associated projects that are part of your instance(s) of RFPIO will appear in the **RFPIO Projects** tab.

RFPIC) Tab	Home	Projects	All 🔻 Q	Search				*	8 4	\$?¢.	n 👼 0
REPIO Proj	PIO Pr	ojects										
			Company* Mack Inc. TEST					•		C	LAUNCH	RFPIO
Stag	ge f	Project Name				Client Name	Due Da	ate	Sectio	ns	Team	
Draft		ABC USA	10 %			RFP Opportunity	01.17	7.2021	i≡	17		

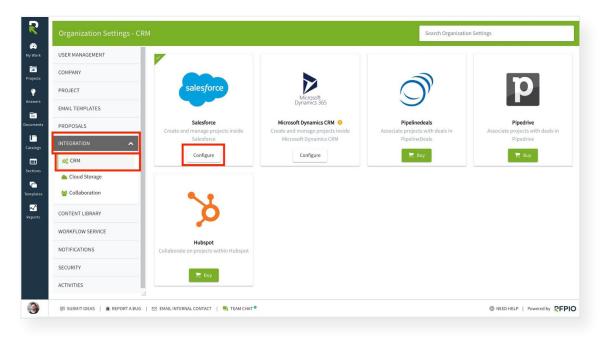
Connecting Salesforce with RFPIO

Before beginning your first response project, you will need to connect RFPIO to Salesforce. To do so, follow the steps below:

1. Log in to RFPIO, select your avatar in the bottom left and click on Organization Settings.



2. Under Integration, select CRM, then click on Configure under the Salesforce integration.



3. Enable the **Salesforce** toggle, then click **Submit**.

R	Organization Settings - CR	м	Search Organization Settings
🗭 My Work	USER MANAGEMENT	÷	
Projects	COMPANY	Salesforce (Enabled)	
Answers	PROJECT	Company id : 5e728405f15bf1cfb2e7b06	SUBMIT
Ē	EMAIL TEMPLATES		SUBMIT
Documents	PROPOSALS		
Catalogs	INTEGRATION	Ado New	
=	😋 CRM		
Sections	Cloud Storage		
Templates	🐸 Collaboration		
Reports	CONTENT LIBRARY		
	WORKFLOW SERVICE		
	NOTIFICATIONS		
	SECURITY		
	ACTIVITIES		
3	同 SUBMITIDEAS 資 REPORT A BUG	😆 EMAIL INTERNAL CONTACT 💐 TEMI CHAT •	S NEED HELP Powered by PFPIO

4. Click Add New to create a new Salesforce instance.

	CRM	Search Organization Settings
USER MANAGEMENT	<i></i>	
COMPANY	Salesforce (Enabled)	
PROJECT	Company id : 5e728405f15bf11cfb2e7b06	
EMAIL TEMPLATES		SUBMIT
PROPOSALS	ADD NEW	
INTEGRATION		
og CRM		
📥 Cloud Storage		
Sollaboration		
CONTENT LIBRARY		
WORKFLOW SERVICE		
NOTIFICATIONS		
SECURITY		
ACTIVITIES		
	BUG 🗠 EMAIL INTERNAL CONTACT 🗮 TEAM CHAT [®]	NEED HELP Powered by REF

5. Enter a name for the instance. Each Salesforce account will be considered as an instance.

R	Organization Settings - CRM	A Search Organization Settings
🖄 My Work	USER MANAGEMENT	\
Projects	COMPANY	Salesforce (Enabled)
Ç Answers	PROJECT	Company id: 5e728405f15bf11cfb2e7b06 SUBMIT
E	EMAIL TEMPLATES	SUBMI
Documents	PROPOSALS	RFPIO Test Instance
Catalogs		Instance Name*
Sections	🚓 CRM	RFPIO Test Instance
emplates	Second Second	Connect To: 🔞 Salesforce Production Instance 🕜 Salesforce Sandbox or test Instance 🖉 Salesforce by providing custom Domain URL
Reports	CONTENT LIBRARY	Sync Internal 1 Hours
	WORKFLOW SERVICE	CONNECT TO SALESFORCE AND PUBLISH DATA FOR REPORTING
	NOTIFICATIONS	Allow association of Intake/Projects with Salesforce objects from within RFPIO Connect using Admin account instead of Individual user account
	SECURITY	Allow association or intrake/Projects with salestore objects from within KPPIO Connect using Admin account instead or monitorial user account
	ACTIVITIES	
3	同 SUBMITIDEAS 身 REPORT A BUG	ESI EMALLINTERNAL CONTACT 🗮 TEAM CHAT®

6. Then, select the instance to connect to from the options. If you select **Salesforce by providing custom Domain URL**, add the URL in the Salesforce URL field.

Organization Settings - CF	2M Search Organization Settings
USER MANAGEMENT	\
COMPANY	Salesforce (Enabled)
PROJECT	Company Id : 5e728405f15bf11cfb2e7b06
EMAIL TEMPLATES	SUBMT
PROPOSALS	RFPIO Test Instance
INTEGRATION	Instance Name*
og CRM	RFPIO Test Instance
Cloud Storage	
嶜 Collaboration	Connect To: Salesforce Production Instance Salesforce Sandbox or test Instance Salesforce by providing custom Domain URL Sync Interval
CONTENT LIBRARY	1 Hours -
WORKFLOW SERVICE	
NOTIFICATIONS	CONNECT TO SALESFORCE AND PUBLISH DATA FOR REPORTING
SECURITY	Z Allow association of Intake/Projects with Salesforce objects from within RFPIO 0 🗌 Connect using Admin account instead of Individual user account
ACTIVITIES	Select Object type for Project Association :
	🖉 EMALINTERNAL CONTACT 💐 TEAM CHAT * 🛞 NEED HELP Powered by E

- 7. Select a **Business Unit** (if applicable).
- 8. Specify the **Sync Interval.** This indicates the interval after which data from Salesforce will be synced with RFPIO.

Note: If 1 hour is specified as the sync interval, and no activities are carried out in a Salesforce-related project in RFPIO, data/changes made in Salesforce will not be automatically synced with RFPIO. Only when the user accesses the Salesforce project in RFPIO will data then be synced.

Organization Settings	- CRM Search Organization Settings
USER MANAGEMENT	<i>+</i>
COMPANY	Salesforce (Enabled)
PROJECT	Company id : 5e728405f15bf11cfb2e7b06
EMAIL TEMPLATES	SUBMIT
PROPOSALS	RFPIO Test Instance
INTEGRATION	Instance Name *
OC CRM	RFPIO Test Instance
Cloud Storage Collaboration	Connect To: Salesforce Production Instance Salesforce Sandbox or test Instance Salesforce by providing custom Domain URL
CONTENT LIBRARY	1 Hours ¥
WORKFLOW SERVICE	CONNECT TO SALESFORCE AND PUBLISH DATA FOR REPORTING
NOTIFICATIONS	Allow association of Intake/Projects with Salesforce objects from within RFPIO 0 Connect using Admin account instead of Individual user account
SECURITY	Select Object type for Project Association :
ACTIVITIES	Select object type of Project Association :

9. Click **CONNECT TO SALESFORCE AND PUBLISH DATA FOR REPORTING**. Selecting this will connect RFPIO to the Salesforce instance specified, and will also publish RFPIO project data for reporting in Salesforce.

	CRM Search Organization Settings
USER MANAGEMENT	(
COMPANY	Salesforce (Enabled)
PROJECT	Company id: 5e728405f15bf11cfb2e7b06
EMAIL TEMPLATES	SUBMIT
PROPOSALS	RFPIO Test Instance
INTEGRATION	
¢ CRM	RFPIO Test Instance
Cloud Storage Collaboration	Connect To: Salesforce Production Instance Salesforce Sandbox or test Instance Salesforce by providing custom Domain URL
CONTENT LIBRARY	1 Hours 🔻
WORKFLOW SERVICE	CONNECT TO SALESFORCE AND PUBLISH DATA FOR REPORTING
NOTIFICATIONS	
SECURITY	Allow association of Intake/Projects with Salesforce objects from within RFPIO O Connect using Admin account instead of Individual user account
ACTIVITIES	Select Object type for Project Association :

Continued on next page.

RFPIO-Salesforce Integration

- 10. A new window will appear. Enter your Salesforce login credentials and log in to your Salesforce org. Then click **Allow** on the next screen.
- 11. Once the connection between RFPIO and your Salesforce org has been established a success message will appear as shown below:

	CRM		Search Organization Settings
USER MANAGEMENT	Connect To: () Salesforce Production Instance	Salesforce Sandbox or test Instance	O Salesforce by providing custom Domain URL
COMPANY	Sync Interval 1 Hours 💌		
PROJECT			
EMAIL TEMPLATES	Account connected and Reports can be generated		
PROPOSALS	 Allow association of Intake/Projects with Sale Export Response Package 	esforce objects from within RFPIO 0 🗌 Conr	nect using Admin account instead of Individual user account
INTEGRATION	Export response Package		
og CRM	Publish Response Package to 🔘 Chatter & Fil	es 🔘 Files	
Cloud Storage	Auto-Publish Export Response Package to S	ialesforce. (Max size: 20 MB)	
📽 Collaboration	Select Object type for Project Association :		
CONTENT LIBRARY	Objects	Project Report Field	Mapping
WORKFLOW SERVICE	+ Add Salesforce Data		
NOTIFICATIONS	Set Default: Opportunity		
SECURITY	RFPIO Test Instance (Disabled)		SUBMIT
ACTIVITIES			
回 SUBMITIDEAS 賽 REPORTAE	ug 🖂 Email Internal contact 🗮 team chat 🍨		⊗ NEED HELP Powered by ₹

- 12. Select/deselect the checkboxes as needed:
 - a. Allow association of Intake/Projects with Salesforce objects from within RFPIO: If selected, users will be able to create intake/projects in RFPIO and associate them with Salesforce objects. If not selected, users will not be able to create Salesforce object-associated projects in RFPIO, but can continue creating projects within Salesforce.
 - b. Connect using Admin account instead of Individual user account: This option will only be available if the Allow association of Intake/Projects with Salesforce objects from within RFPIO checkbox is selected. If selected, the user will be able to connect with Salesforce using an admin account. When not selected, if the user is creating a Salesforce-associated project in RFPIO, they will need to connect to Salesforce using their own account.

			Search Organization Settings
USER MANAGEMENT	Connect To : (Salesforce Production Instance	Salesforce Sandbox or test Instance	Salesforce by providing custom Domain URL
COMPANY	Sync Interval		
PROJECT			
EMAIL TEMPLATES	Account connected and Reports can be generated in		
PROPOSALS	Allow association of Intake/Projects with Salesf	orce objects from within RFPIO 🟮 🗹 Con	nect using Admin account instead of Individual user account
INTEGRATION			
QC CRM	Publish Response Package to Chatter & Files	O Files	
Cloud Storage	Auto-Publish Export Response Package to Sale	esforce. (Max size: 20 MB)	
🚰 Collaboration	Select Object type for Project Association :		
CONTENT LIBRARY	Objects	Project Report Field	Mapping
WORKFLOW SERVICE	+ Add Salesforce Data		
NOTIFICATIONS	Set Default : Opportunity 💌		
SECURITY	RFPIO Test Instance (Disabled)		SUBMIT
ACTIVITIES			
	🗵 EMAIL INTERNAL CONTACT 📕 TEAM CHAT •		@ NEED HELP Powered b

13. From the Export Response Package section, select one of the radio button options. Select Chatter & Files when you need the export package to be published in Chatter as well as Notes and Attachments in Salesforce. Select Files if you want the export package to be published only in Notes and Attachments. For more information, refer to Publishing Export Response Packages to Salesforce.

	Organization Settings - CRM	Search Organization Settings
) ark U	JSER MANAGEMENT	Connect To: 💿 Salesforce Production Instance 🚫 Salesforce Sandbox or test Instance 🚫 Salesforce by providing custom Domain URL
s 0	COMPANY	Systematical Hours 💌
	PROJECT	
E	MAIL TEMPLATES	Account connected and Reports can be generated in Salesforce 💢 🧯 🥵
s P	PROPOSALS	Allow association of Intake/Projects with Salesforce objects from within RFPIO O Connect using Admin account instead of Individual user account Export Response Package
. 11	NTEGRATION	
	😋 CRM	Publish Response Package to Chatter & Files Files
	Cloud Storage	Auto-Publish Export Response Package to Salesforce. (Max size: 20 MB)
	嶜 Collaboration	Select Object type for Project Association :
o	CONTENT LIBRARY	Objects Project Report Field Mapping
W	NORKFLOW SERVICE	+ Add Salesforce Data
N	NOTIFICATIONS	Set Default: Opportunity 💌
S	SECURITY	SUBMIT SUBMIT
A	ACTIVITIES	
Q	🕮 SUBMITIDEAS 🎪 REPORTABUG B	2 EMAIL INTERNAL CONTACT 💐 TEAM CHAT®

 Under Select Object type for Project Association select the objects that can be associated with projects. To disassociate an object with RFPIO, deselect the checkbox. However, at least one object must be selected.

To add a custom object to associate with projects, click Add Salesforce Data.

Lastly, set the default object for project/intake association by choosing an option from the **Set Default** drop-down menu.

R	Organization Settings - CRM		Search Organization Settings	
My Work	USER MANAGEMENT		ts from within RFPIO 0 🗌 Connect using Admin account instead of Individual user account	
Projects	COMPANY PROJECT	Export Response Package Publish Response Package to Chatter & Files Files	Files	
Answers	EMAIL TEMPLATES	Auto-Publish Export Response Package to Salesforce. (M		
[T Catalogs		Select Object type for Project Association :	Desired Decest Field Manalan	
Sections	 ✿[®] CRM ▲ Cloud Storage 	Objects	Project Report Field Mapping Account Id [Reference]	×
emplates	嶜 Collaboration	Lead	Lead id [Reference] Opportunity Id [Reference]	* *
Reports	CONTENT LIBRARY WORKFLOW SERVICE	Add Salesforce Data	opportunity is [reference]	
	NOTIFICATIONS	Set Default : Opportunity		
	ACTIVITIES	RFPIO Test Instance (Disabled)		SUBMIT
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15. Select the toggle and the bottom of the page to enable the instance. Then, click Submit.

R MANAGEMENT APANY UJECT INL TEMPLATES DPOSALS		Connect using Admin account instead of Individual user account
AIL TEMPLATES		
JPOSALS		MB)
EGRATION	Select Object type for Project Association : Objects	Project Report Field Mapping
Cloud Storage	Account Lead	Account Id [Reference]
NTENT LIBRARY	Opportunity Add Salesforce Data	Opportunity Id [Reference]
	Set Default: Opportunity RFPIO Test Instance (Enabled)	SUBMIT
INITIES		@ NED HELP Powered by REP
	CRM Cloud Storage Collaboration TENT LIBRARY KFLOW SERVICE IFICATIONS URITY VITIES	GRATION Cloud Storage Cloud Storage Image: Collaboration Collaboration Image: Collaboration TENT LIBRARY Image: Collaboration KFLOW SERVICE Image: Collaboration FICATIONS Set Default: Opportunity Image: Collaboration Image: Collaboration

