

INSTALLATION GUIDE

RFPIO-Salesforce Integration

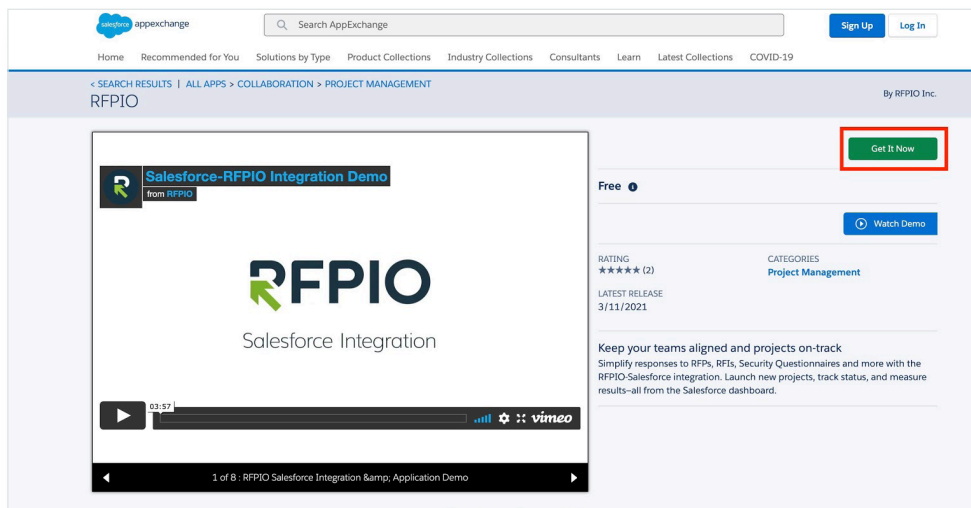
This guide will give you the foundation to integrate and use your RFPIO instance with your Salesforce org



Installing the RFPIO App in Salesforce

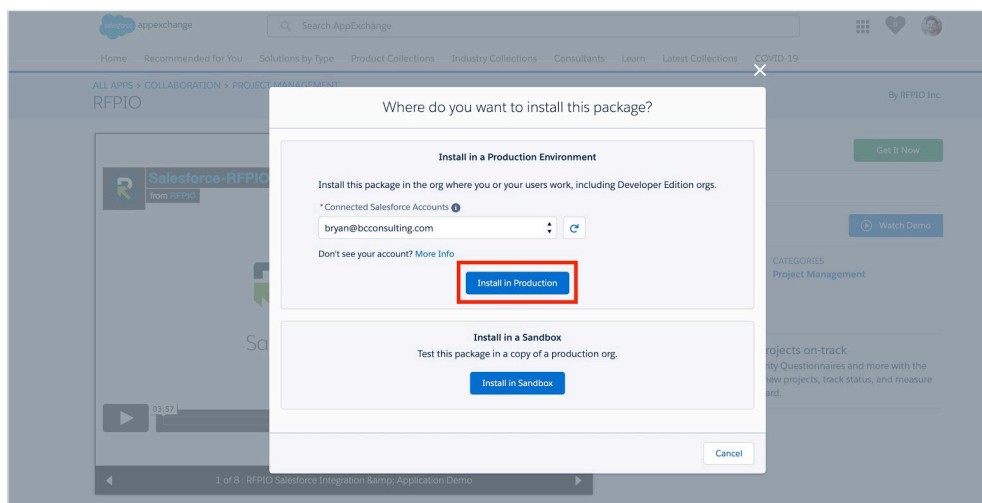
To install the RFPIO App from the Salesforce AppExchange:

1. Search "RFPIO" in the [Salesforce AppExchange](#) and select the RFPIO App. Click **Get It Now**.



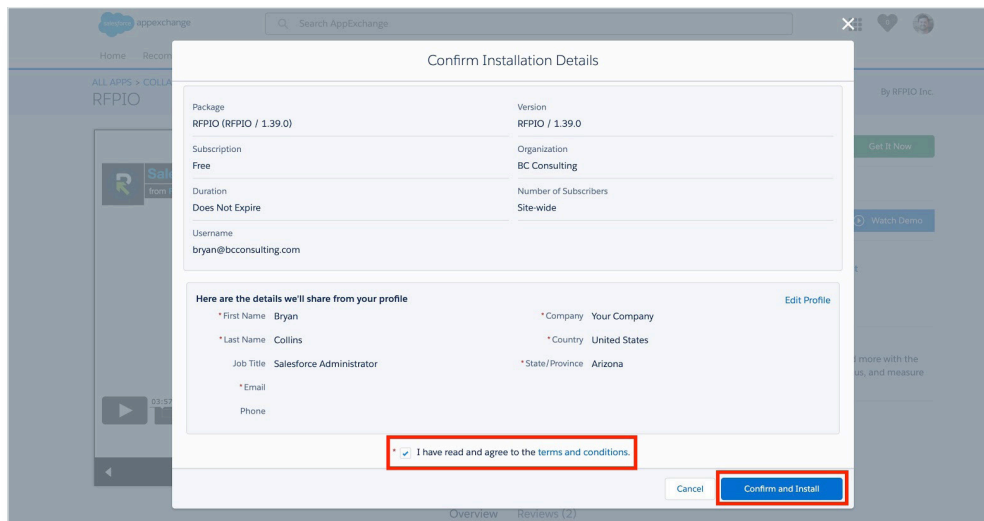
2. If you haven't done so already, log in to [Salesforce](#) using your credentials. Click **Install in Production**.

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

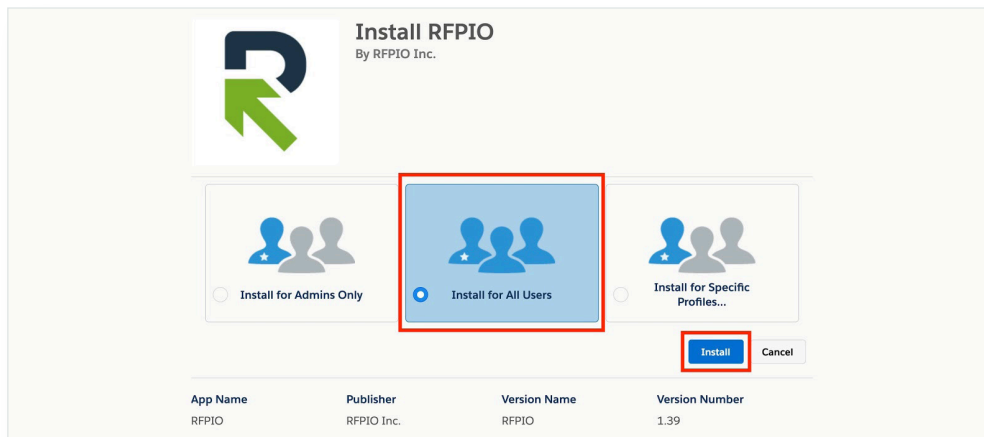


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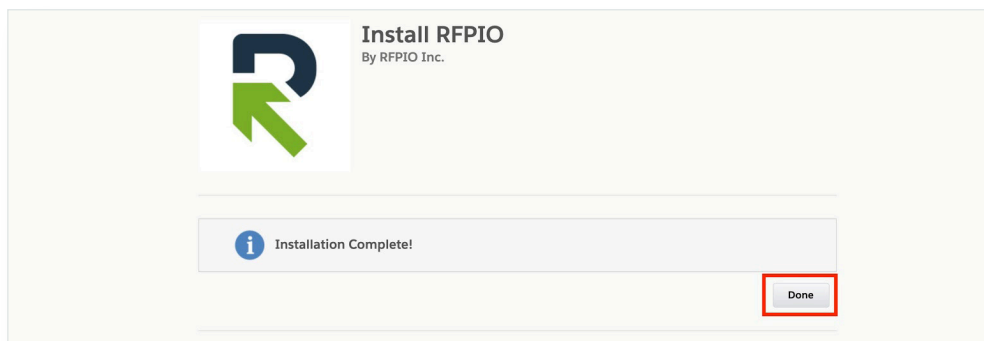
3. Check the terms and conditions box, then click **Confirm and Install**.



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

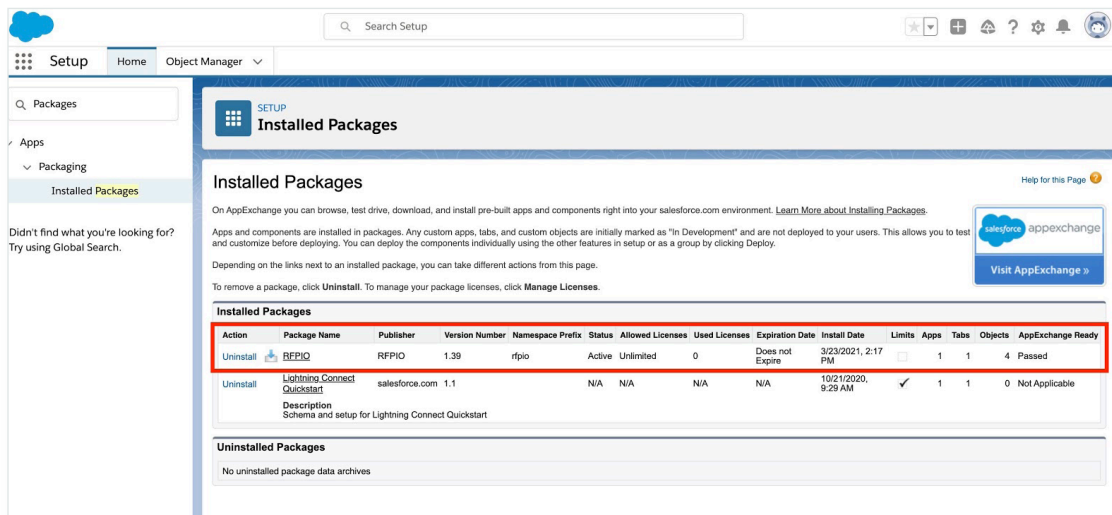


5. A confirmation message will appear. Click **Done**.

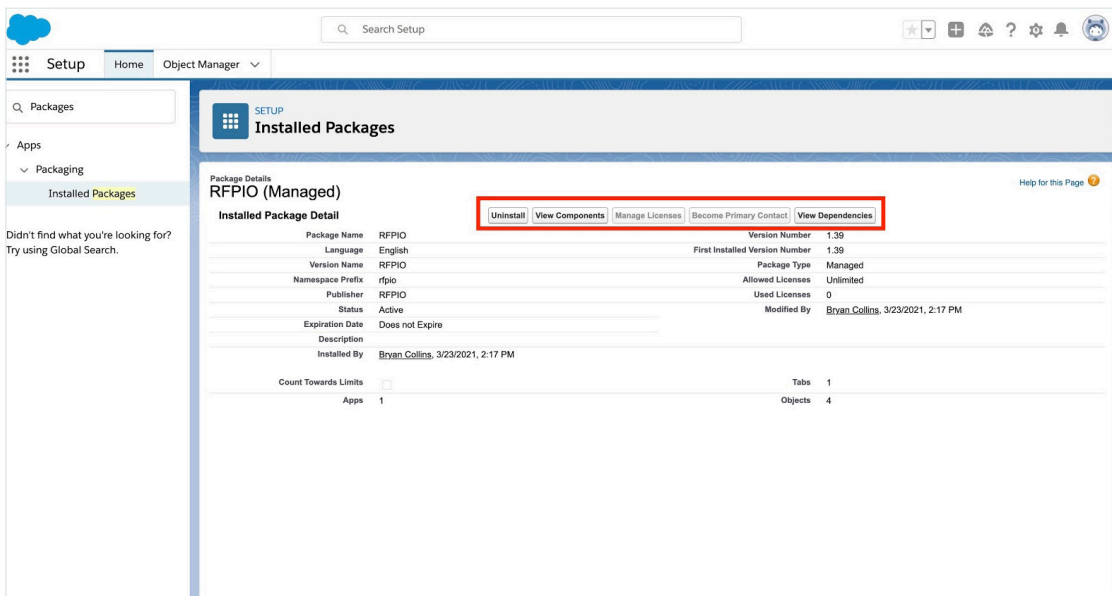


Managing the RFPIO Package in Salesforce

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.



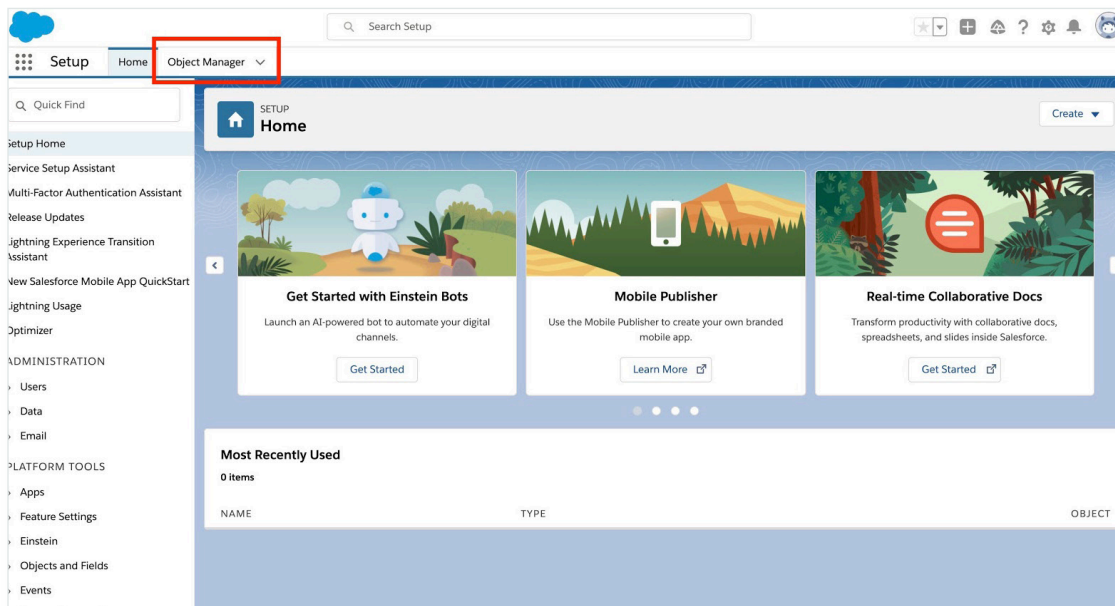
Here you can uninstall the package, and view its components and dependencies, as well as view additional details about the package.



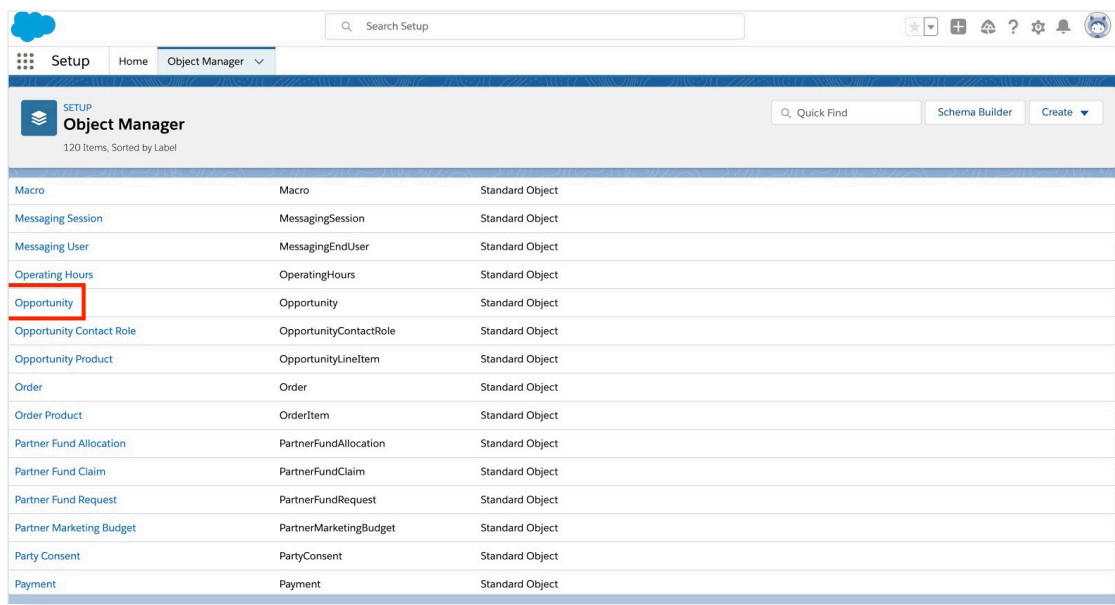
Adding RFPIO to Page Layouts in Salesforce

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

1. Go to the **Object Manager** under **Setup**.

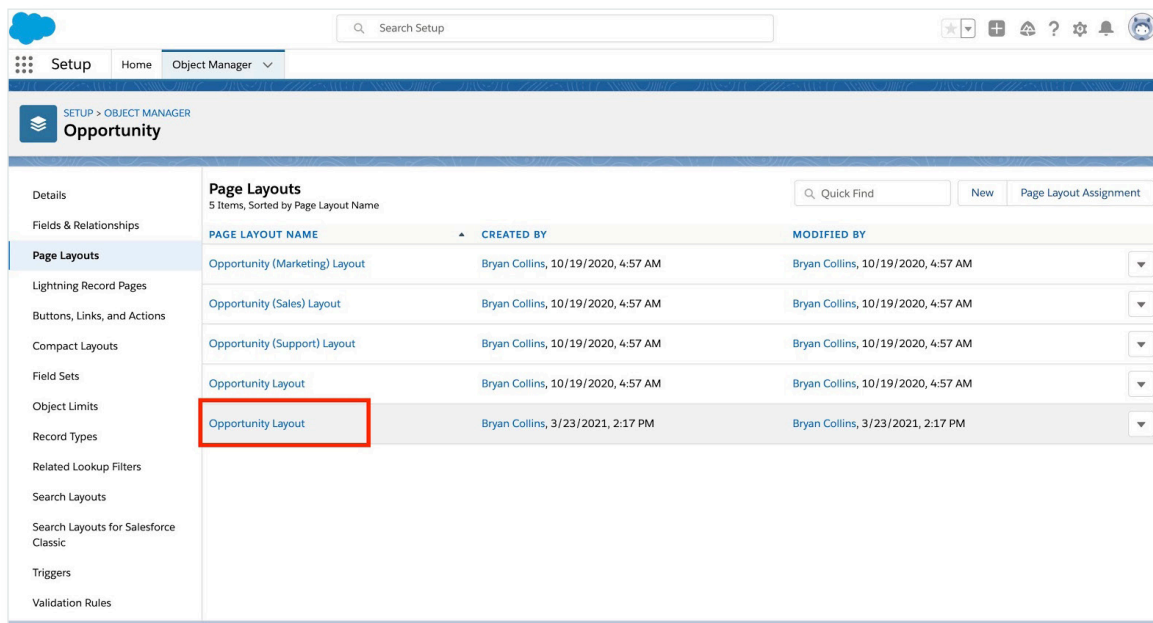


2. Search for and select the **Opportunity** object from the list.

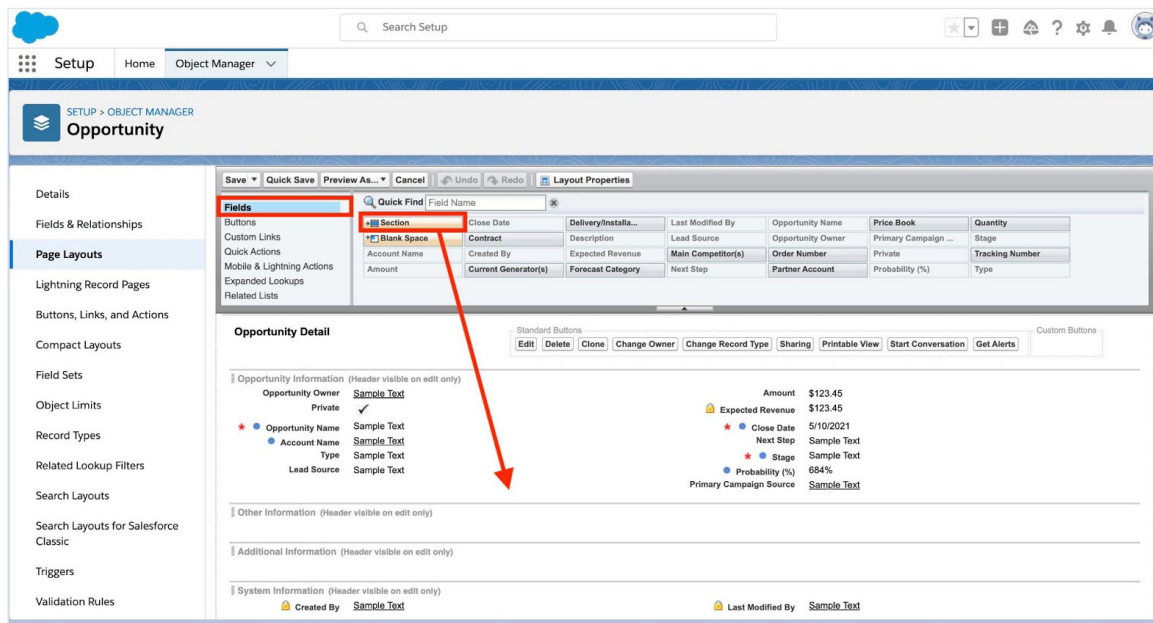


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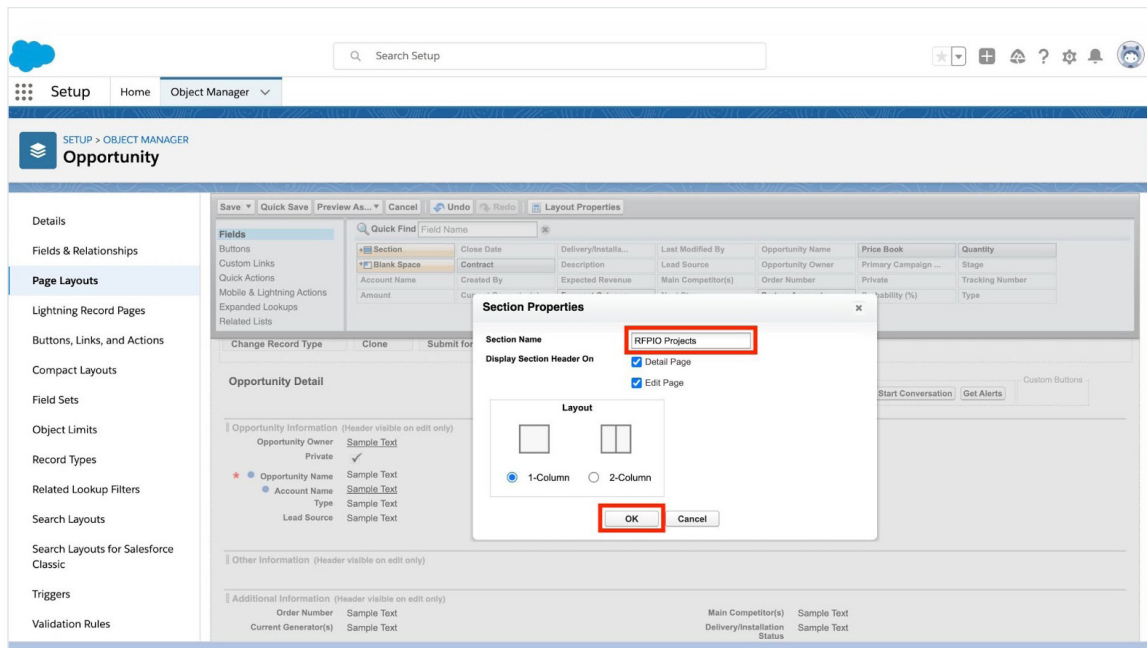
3. Go to **Page Layouts** and click the **Opportunity Layout**.



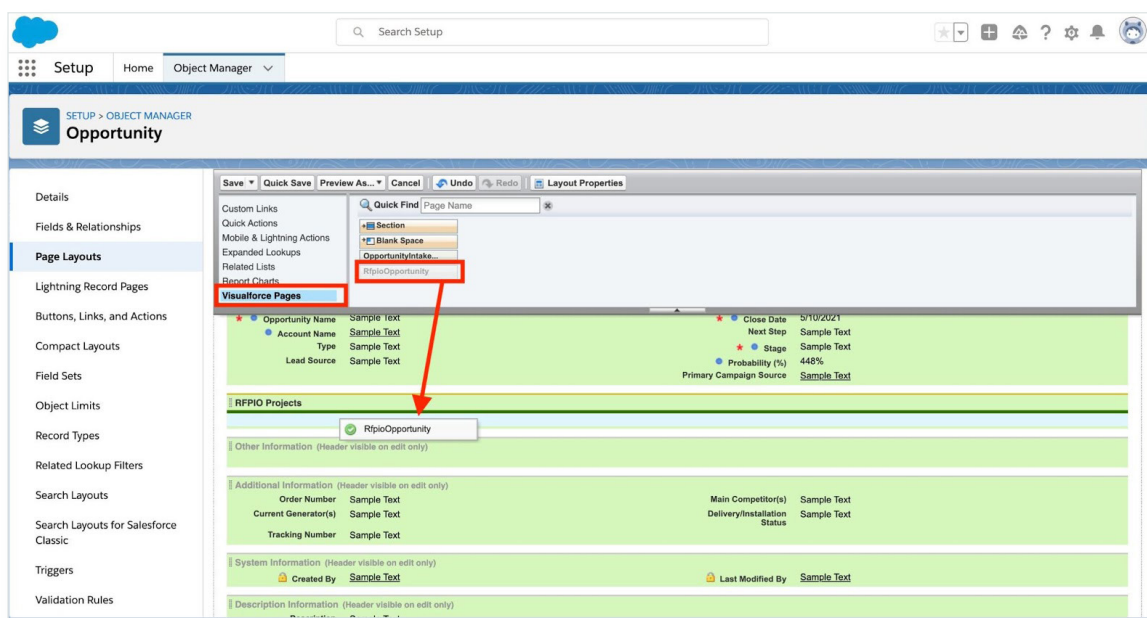
4. A new section must be added to allow RFPIO to be shown in Opportunities. In the Opportunity Layout options, select **Fields**, then drag a **Section** anywhere on the Opportunity Layout.



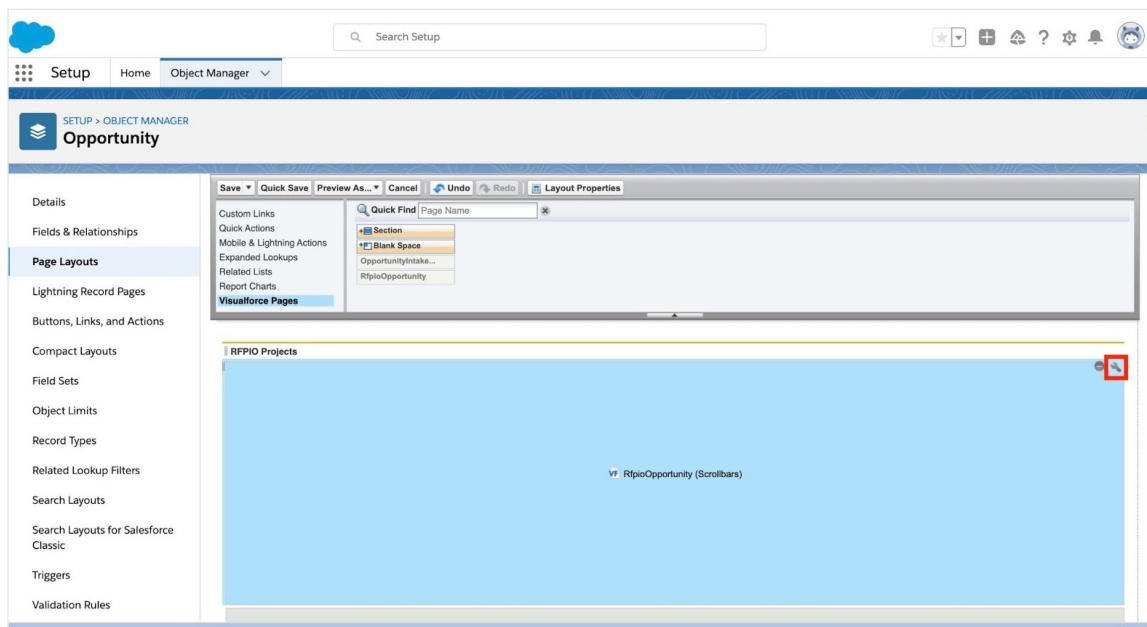
5. Once added, you will be prompted to set up the section properties. We recommend naming the section something like **RFPIO Projects** and setting the layout to 1-Column. Click **OK**.



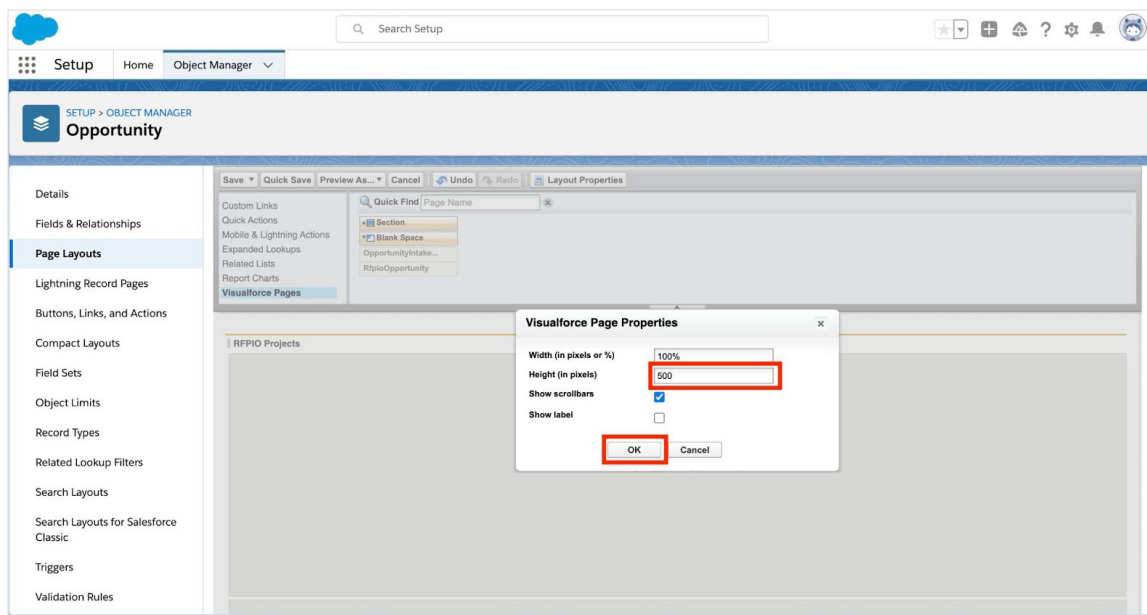
6. Next, in the Opportunity Layout options, select **Visualforce Pages**, then drag **RfpioOpportunity** to the section you just created. Select the Opportunity object from the list.



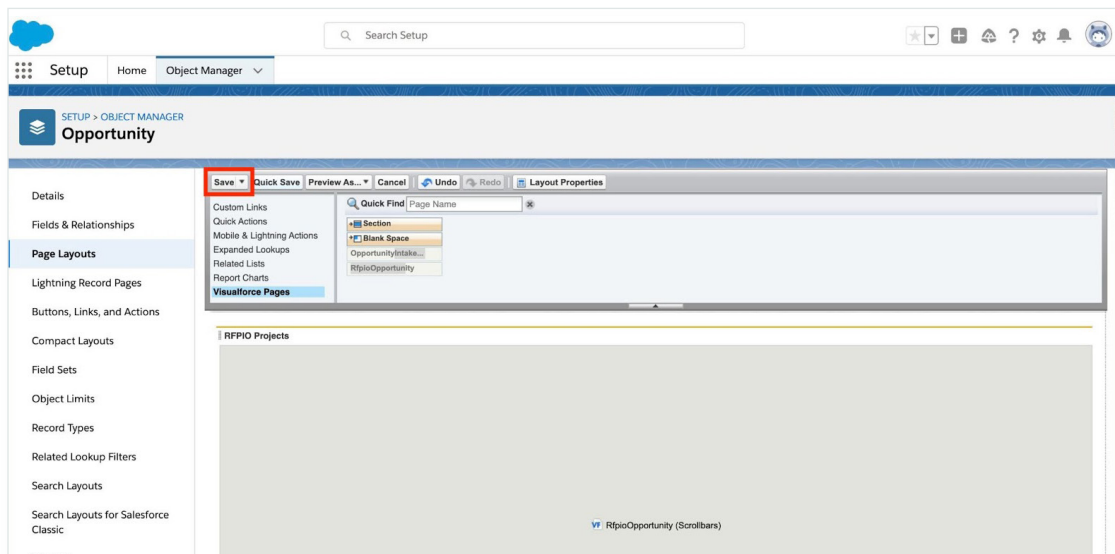
7. Click **Properties** (i.e. the wrench icon) on the right side of the RFPIO section.



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



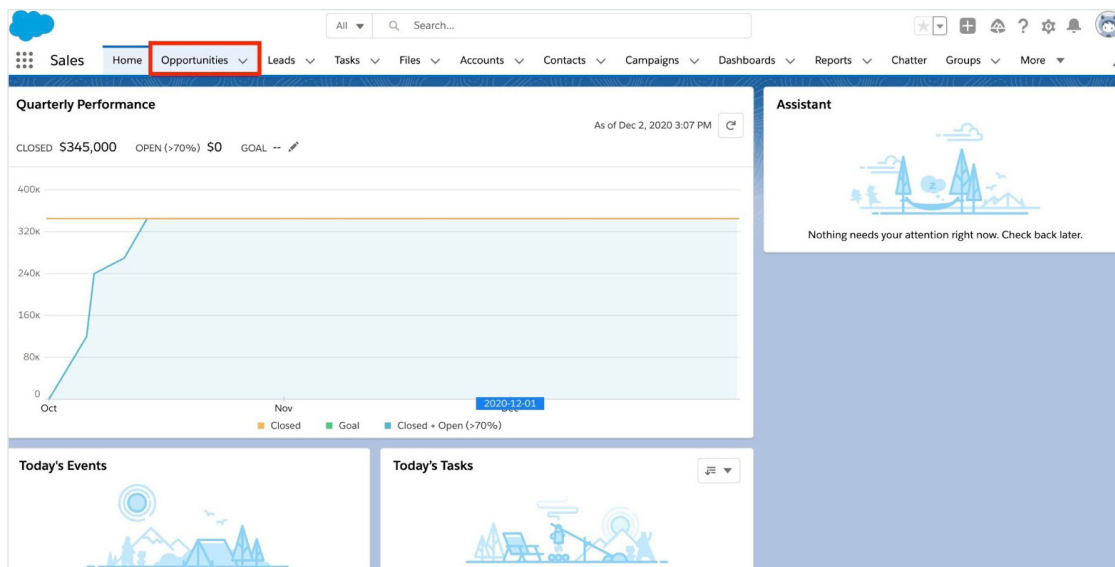
9. When finished, click **Save** to save the layout.



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.

The screenshot shows the Salesforce interface for an Opportunity record titled "Dickenson Mobile Generators". The "Details" tab is selected and highlighted with a red box. The record shows the following information:

- Account Name: Dickenson plc
- Close Date: 8/27/2020
- Amount: \$15,000.00
- Opportunity Owner: Bryan Collins

The record is in the "Qualification" stage, as indicated by the progress bar and the "Details" tab. The "Details" tab shows the following fields:

- Opportunity Owner: Bryan Collins
- Private: ☐
- Opportunity Name: Dickenson Mobile Generators
- Account Name: Dickenson plc
- Type: New Customer
- Lead Source: Purchased List
- Amount: \$15,000.00
- Expected Revenue: \$1,500.00
- Close Date: 8/27/2020
- Next Step: [Empty]
- Stage: Qualification
- Probability (%): 10%
- Primary Campaign Source: [Empty]

The "Related" section on the right shows:

- Products (0)
- Notes & Attachments (0)
- Contact Roles (0)

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

The screenshot shows the Salesforce interface for the same Opportunity record, "Dickenson Mobile Generators". The "RFPIO Projects" section is expanded, showing a "CONNECT TO RFPIO" button highlighted with a red box. The button is located in the "RFPIO Projects" section, which also includes buttons for "Create Project", "Associate Existing Projects", "Remove Association", and "Launch RFPIO".

The "Stage History (2)" section on the right shows the following details:

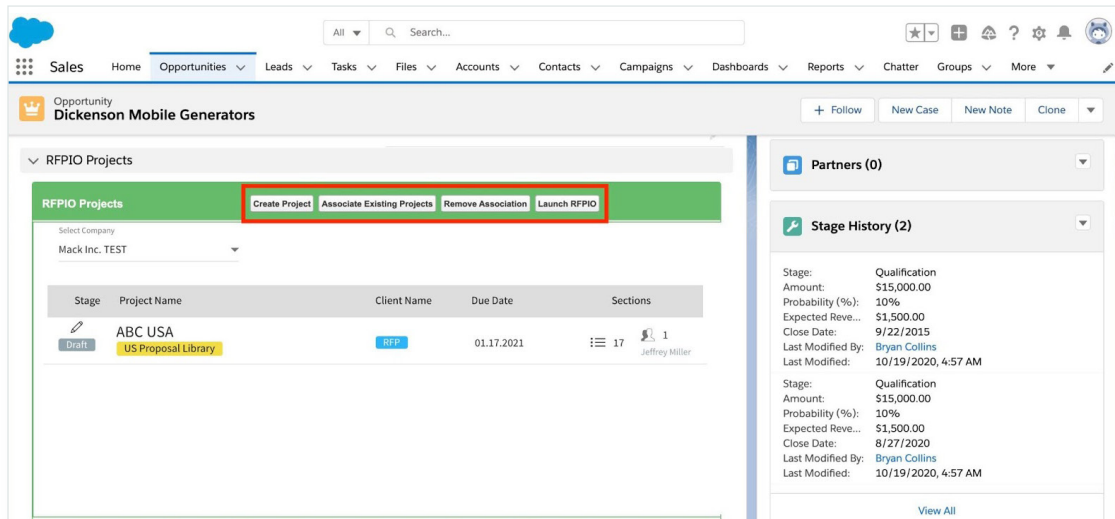
Stage	Qualification
Amount:	\$15,000.00
Probability (%):	10%
Expected Revenue:	\$1,500.00
Close Date:	8/27/2020
Last Modified By:	Bryan Collins
Last Modified:	10/19/2020, 4:57 AM

The "View All" link is visible at the bottom of the "Stage History" section.

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

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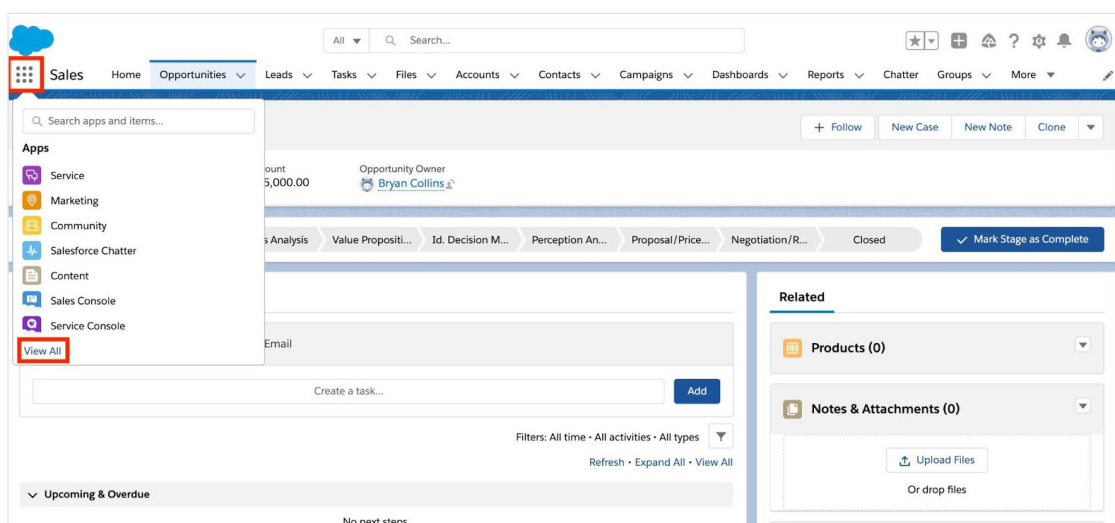
4. Once logged in, you have several options for working with projects on object records:
 - e. **Create Project:** create a project and associate it with the record
 - f. **Associate Existing Projects:** locate existing projects within your RFPIO instance(s) and associate them with records
 - g. **Remove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



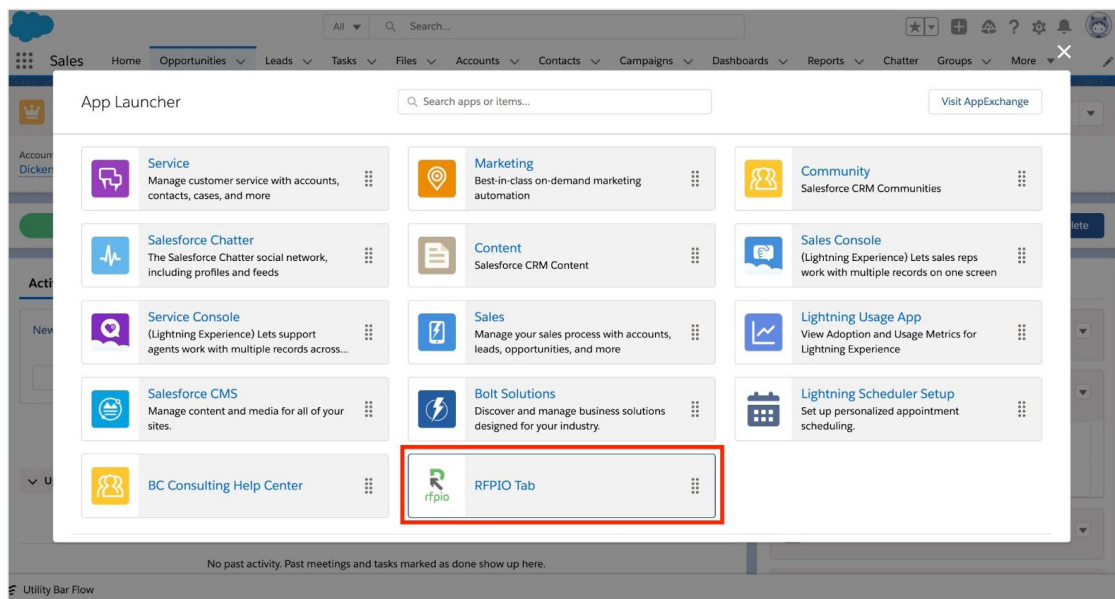
Viewing All RFPIO Projects in Salesforce

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

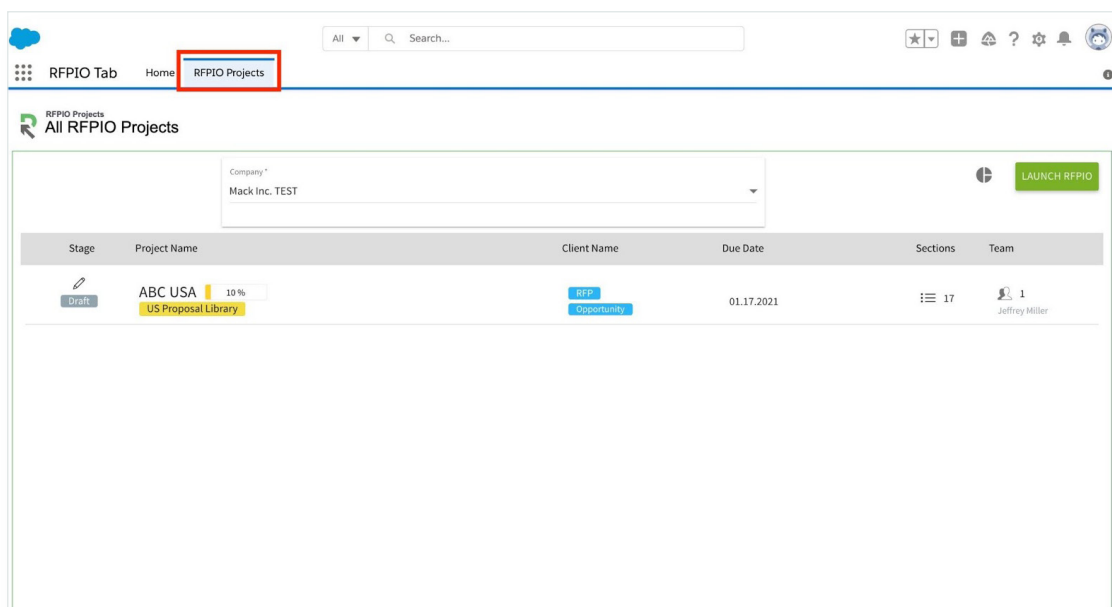
1. Select the app menu and click **View All**.



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



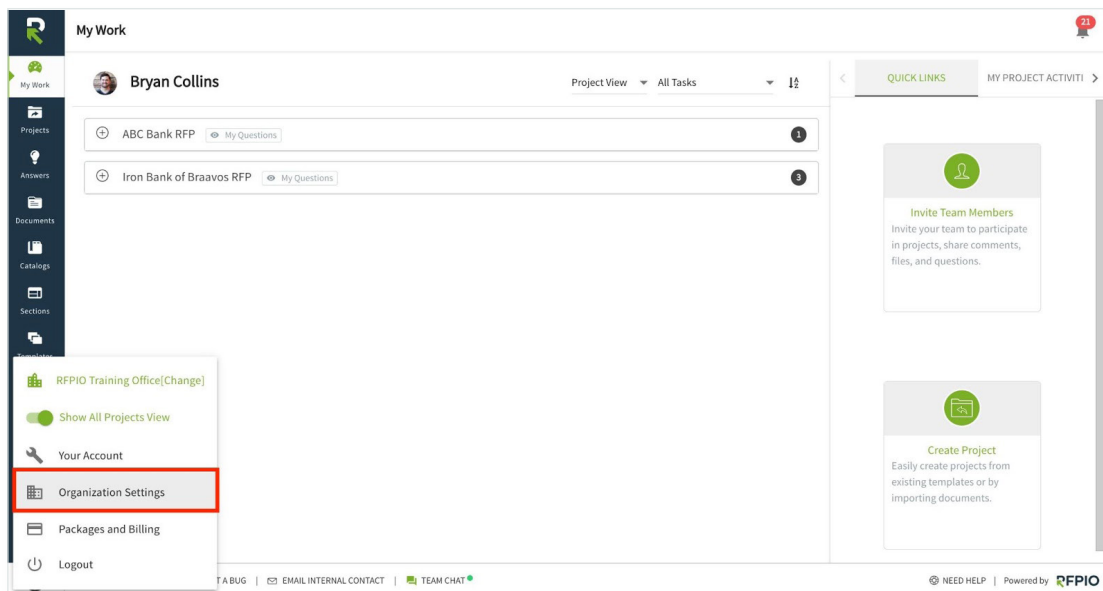
3. Associated projects that are part of your instance(s) of RFPIO will appear in the **RFPIO Projects** tab.



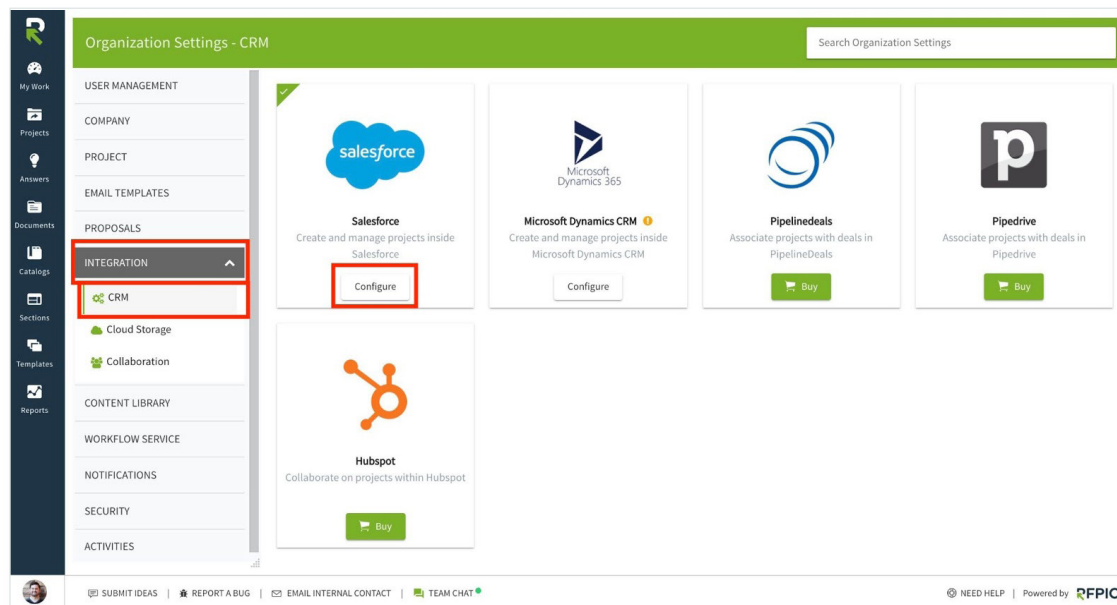
Connecting Salesforce with RFPIO

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**.

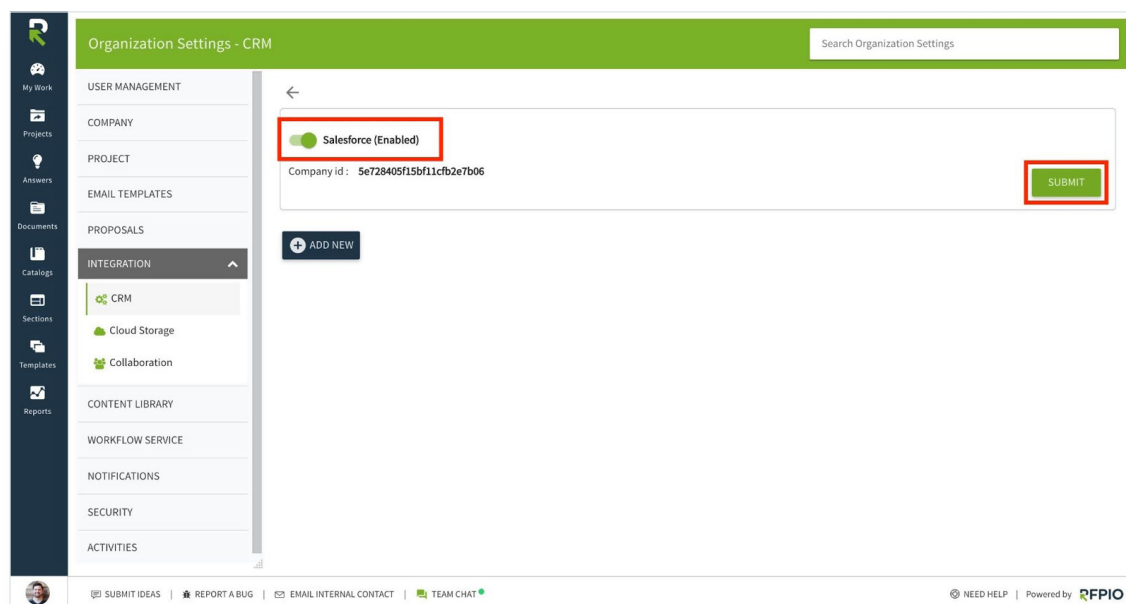


2. Under **Integration**, select **CRM**, then click on **Configure** under the Salesforce integration.

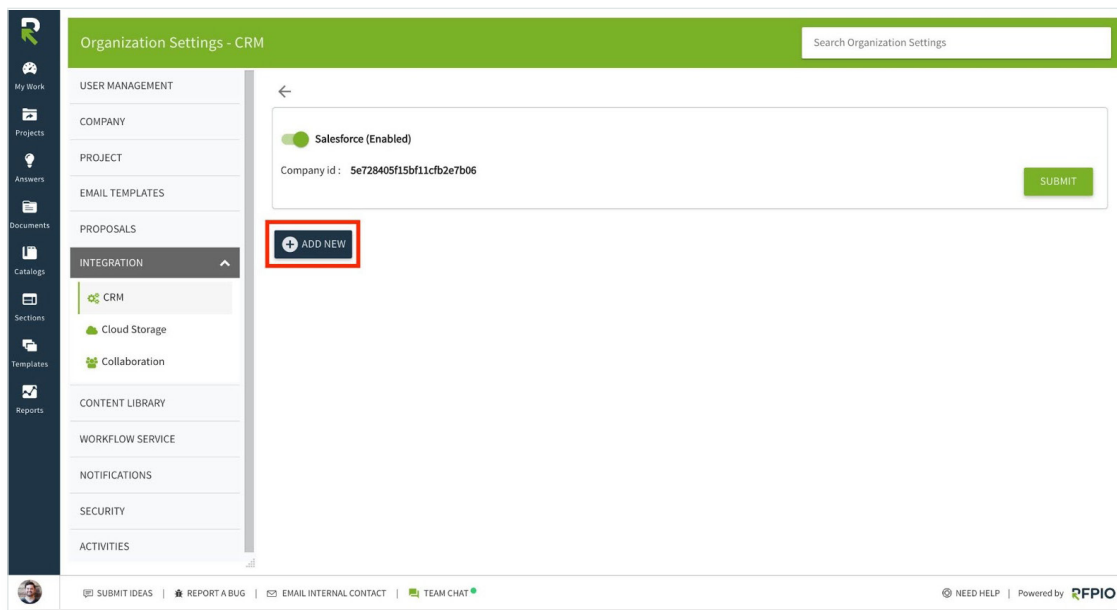


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3. Enable the **Salesforce** toggle, then click **Submit**.



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



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

The screenshot shows the 'Organization Settings - CRM' page. On the left is a sidebar with navigation links: My Work, Projects, Answers, Documents, Catalogs, Sections, Templates, and Reports. The main content area has a green header with 'Organization Settings - CRM' and a search bar. Below the header, there's a 'USER MANAGEMENT' section. The 'INTEGRATION' section is expanded, showing 'CRM' as the selected category. Under 'CRM', there's a 'Salesforce (Enabled)' section with a 'Company id: 5e728405f15bf11cfb2e7b06' and a 'SUBMIT' button. Below this, there's a 'RFPIO Test Instance' section. The 'Instance Name' field is highlighted with a red box and contains the text 'RFPIO Test Instance'. Below the name field, there are three radio buttons for 'Connect To': 'Salesforce Production Instance' (selected), 'Salesforce Sandbox or test Instance', and 'Salesforce by providing custom Domain URL'. Below these, there's a 'Sync Interval' field set to '1' with a unit dropdown set to 'Hours'. A 'CONNECT TO SALESFORCE AND PUBLISH DATA FOR REPORTING' button is present. Below the button, there are two checkboxes: 'Allow association of Intake/Projects with Salesforce objects from within RFPIO' (checked) and 'Connect using Admin account instead of Individual user account' (unchecked). At the bottom, there's a 'Select Object type for Project Association' dropdown.

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.

This screenshot is identical to the previous one, but the 'Connect To' radio buttons are highlighted with a red box. The 'Salesforce by providing custom Domain URL' option is now selected, while 'Salesforce Production Instance' is unselected. The 'Instance Name' field remains 'RFPIO Test Instance'. The 'Sync Interval' is still '1' hour. The 'CONNECT TO SALESFORCE AND PUBLISH DATA FOR REPORTING' button and the checkboxes below it are also visible.

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

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ACTIVITIES

Salesforce (Enabled)

Company id : 5e728405f15bf11cfb2e7b06

SUBMIT

RFPIO Test Instance

Instance Name *

RFPIO Test Instance

Connect To : ☒ Salesforce Production Instance ☐ Salesforce Sandbox or test Instance ☐ Salesforce by providing custom Domain URL

Sync Interval

1 Hours

CONNECT TO SALESFORCE AND PUBLISH DATA FOR REPORTING

☒ Allow association of Intake/Projects with Salesforce objects from within RFPIO ☐ Connect using Admin account instead of individual user account

Select Object type for 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.

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ACTIVITIES

Salesforce (Enabled)

Company id : 5e728405f15bf11cfb2e7b06

SUBMIT

RFPIO Test Instance

Instance Name *

RFPIO Test Instance

Connect To : ☒ Salesforce Production Instance ☐ Salesforce Sandbox or test Instance ☐ Salesforce by providing custom Domain URL

Sync Interval

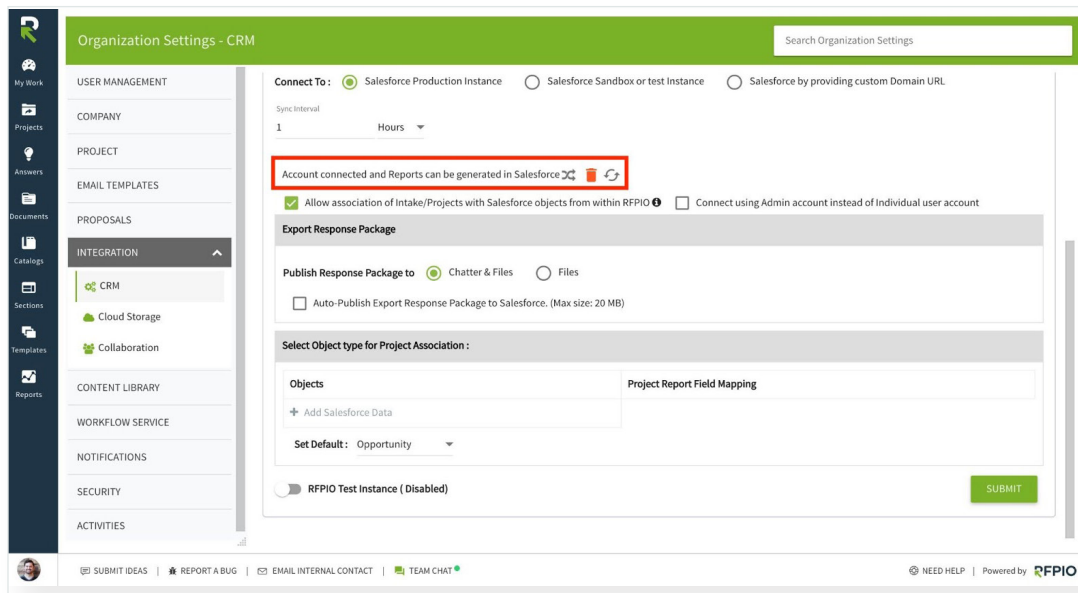
1 Hours

CONNECT TO SALESFORCE AND PUBLISH DATA FOR REPORTING

☒ Allow association of Intake/Projects with Salesforce objects from within RFPIO ☐ Connect using Admin account instead of individual user account

Select Object type for Project Association :

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:



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.

Organization Settings - CRM

Search Organization Settings

Connect To: ☒ Salesforce Production Instance ☐ Salesforce Sandbox or test Instance ☐ Salesforce by providing custom Domain URL

Sync Interval: 1 Hours

Account connected and Reports can be generated in Salesforce

☒ Allow association of Intake/Projects with Salesforce objects from within RFPIO ☒ Connect using Admin account instead of Individual user account

Export Response Package

Publish Response Package to: ☒ Chatter & Files ☐ Files

☐ Auto-Publish Export Response Package to Salesforce. (Max size: 20 MB)

Select Object type for Project Association:

Objects: Project Report Field Mapping

Set Default: Opportunity

☐ RFPIO Test Instance (Disabled)

SUBMIT

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

Connect To: ☒ Salesforce Production Instance ☐ Salesforce Sandbox or test Instance ☐ Salesforce by providing custom Domain URL

Sync Interval: 1 Hours

Account connected and Reports can be generated in Salesforce

☒ Allow association of Intake/Projects with Salesforce objects from within RFPIO ☒ Connect using Admin account instead of Individual user account

Export Response Package

Publish Response Package to: ☒ Chatter & Files ☐ Files

☐ Auto-Publish Export Response Package to Salesforce. (Max size: 20 MB)

Select Object type for Project Association:

Objects: Project Report Field Mapping

Set Default: Opportunity

☐ RFPIO Test Instance (Disabled)

SUBMIT

14. 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.

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Allow association of Intake/Projects with Salesforce objects from within RFPIO ☒ Connect using Admin account instead of Individual user account ☐

Export Response Package

Publish Response Package to ☒ Chatter & Files ☐ Files

☐ Auto-Publish Export Response Package to Salesforce. (Max size: 20 MB)

Select Object type for Project Association :

Objects	Project Report Field Mapping
<input checked="" type="checkbox"/> Account	Account Id [Reference]
<input checked="" type="checkbox"/> Lead	Lead Id [Reference]
<input checked="" type="checkbox"/> Opportunity	Opportunity Id [Reference]
+ Add Salesforce Data	

Set Default: Opportunity

☐ RFPIO Test Instance (Disabled)

SUBMIT

15. Select the toggle and the bottom of the page to enable the instance. Then, click **Submit**.

Organization Settings - CRM

Search Organization Settings

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Allow association of Intake/Projects with Salesforce objects from within RFPIO ☒ Connect using Admin account instead of Individual user account ☐

Export Response Package

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Objects	Project Report Field Mapping
<input checked="" type="checkbox"/> Account	Account Id [Reference]
<input checked="" type="checkbox"/> Lead	Lead Id [Reference]
<input checked="" type="checkbox"/> Opportunity	Opportunity Id [Reference]
+ Add Salesforce Data	

Set Default: Opportunity

☒ RFPIO Test Instance (Enabled)

SUBMIT

