Midyear in Review
2025

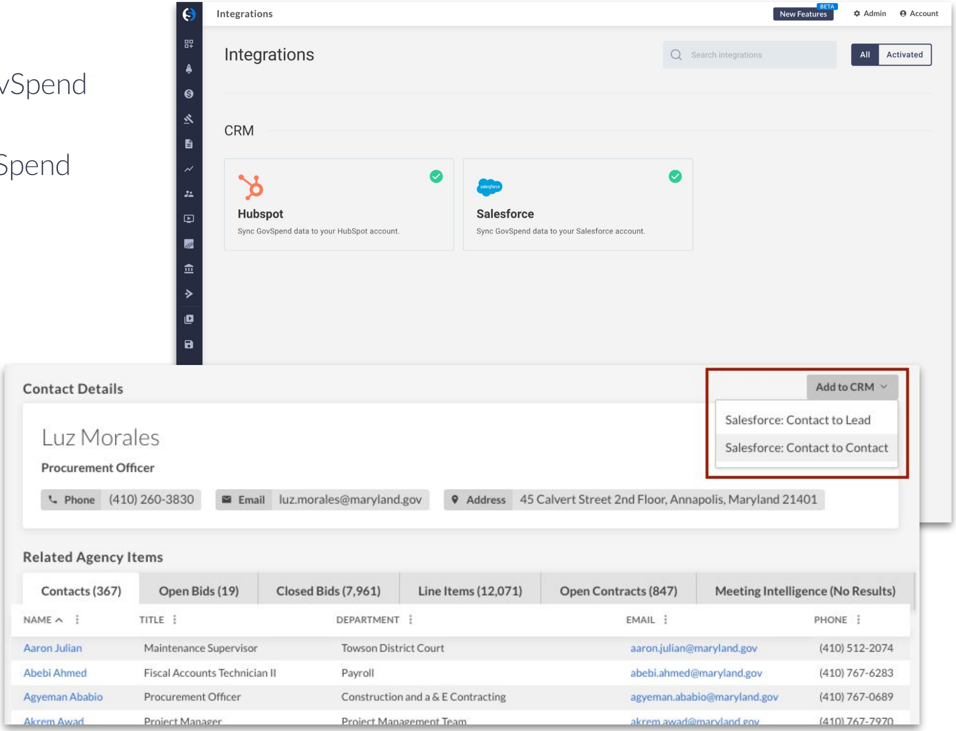
Agenda

- CRM Integration
- New AI-Powered Features
- Sneak Peek at Notebook (coming soon!)
- General Workflow Improvements
- Resources & Questions

CRM Integration: General Overview

Bring Govspend's powerful data directly into the tools where your teams can take action efficiently and effectively.

- **Connect seamlessly** with your CRM tool directly from GovSpend
- **Easy authentication** and connection set up
- **Simple mapping interface** to review and update how GovSpend data maps to your CRM workflows
- **Integrate data from across the GovSpend platform:**
  - Bids & RFPs
  - Contacts
  - Co-ops & Contracts
  - Spending
  - Meeting Intelligence
- Easy **one-click option** to integrate records individually, in batch, or on a schedule
- Select pre-built integration flows or **customize** to your specific needs
- **Integration support for multiple CRM systems:**
  - Salesforce - Available Now
  - Hubspot - Available Now
  - Microsoft Dynamics & Others - Q4+



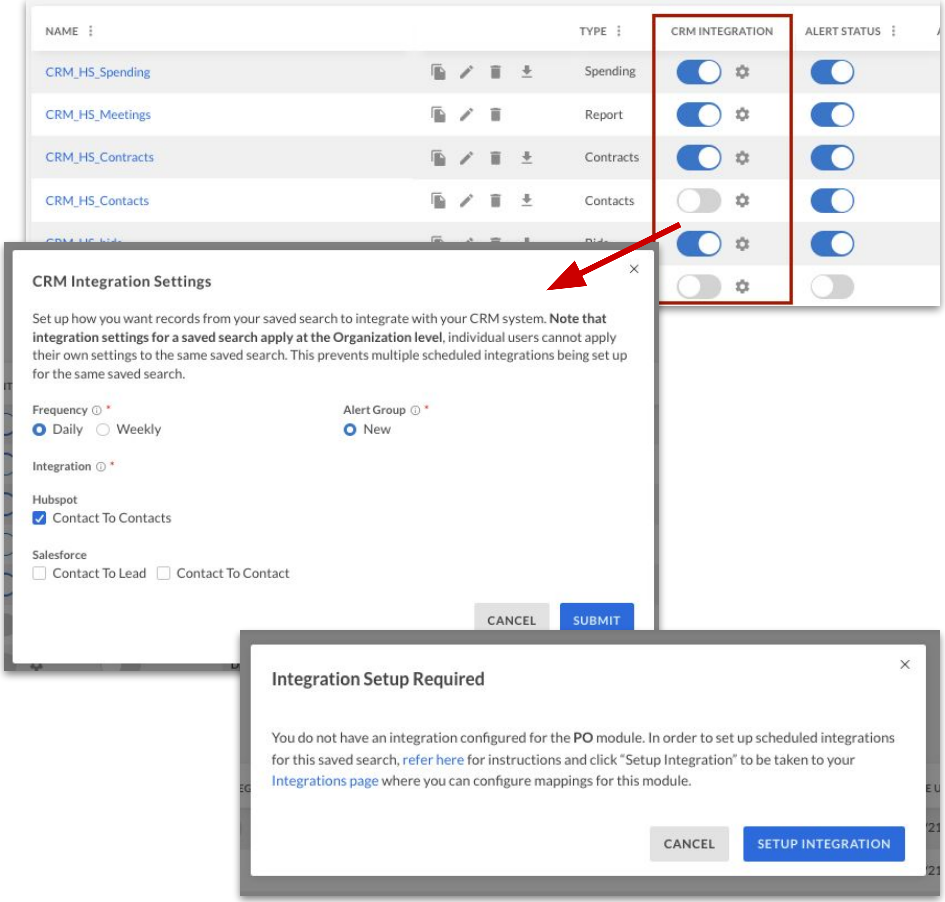
CRM Integration: Saved Search Scheduled Integrations

You can now automatically integrate new records coming into a search to your CRM on a schedule. This means once you set up the integration for a saved search, records will flow seamlessly to your CRM without you having to manually click to integrate records one by one from GovSpend.

HOW TO FIND IT

- ➔ Navigate to the **Saved Searches** page
- ➔ In the "**CRM Integration**" column, click the toggle to turn on integration for a specific search
- ➔ This opens a modal where the user can select the frequency they want data sent, and what mapping they want for the data
    - ◆ Frequencies available: Daily, Weekly, Immediate (bids only)
- ➔ Once set, similar to our saved search alert emails, new records coming into that search will be pushed to the customer's CRM on their selected schedule
- ➔ If you haven't set up integration mapping for the module of the search, we'll direct you to the integrations page to configure that mapping
- ➔ **Note:** The current functionality supports sending up to **200 records** per search each time the schedule runs. If a search has more than 200 new records, only the first 200 will integrate. This is to prevent sending a lot of noise to a customer's CRM.

Review our help documentation for full details!



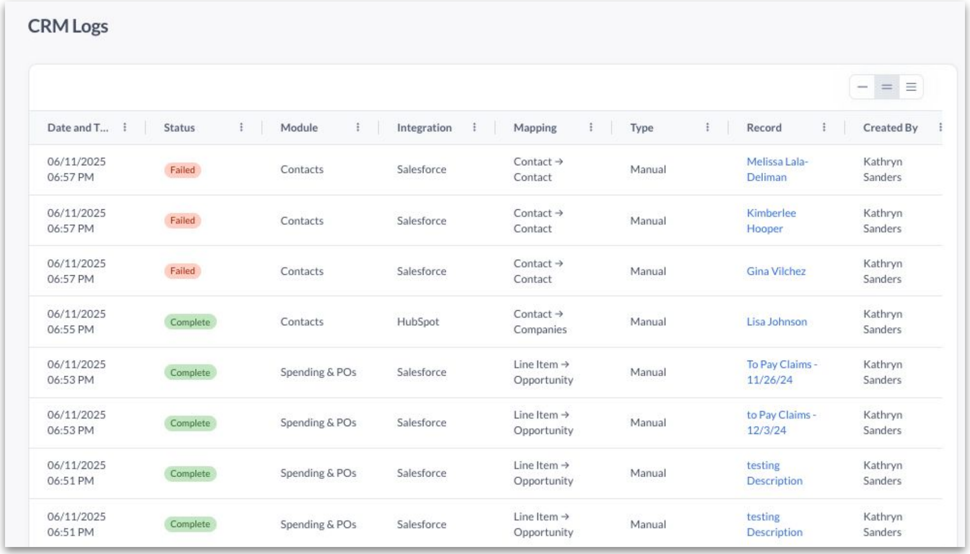
CRM Integration: Customer Facing Integration Status/Logging Page

We've introduced a NEW page in GovSpend specific to integrations that shows the status of all your integrated records. Track what records integrated successfully and more importantly records that failed, with access to error information that can help you troubleshoot.

HOW TO FIND IT

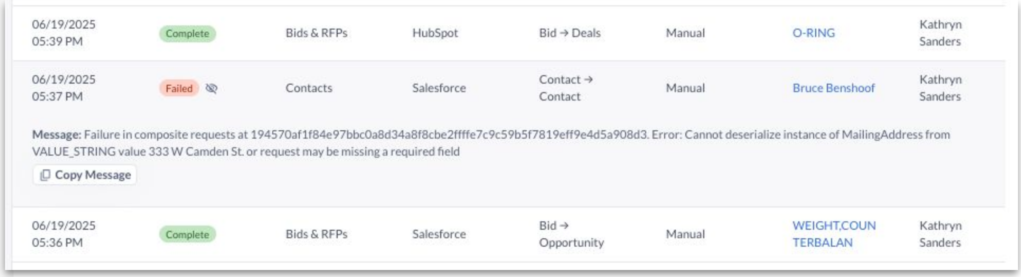
- ➔ Use the **Account menu** to navigate to the "**Integration Logs**" page (*Note that you must have CRM integration permissions to view this page*)
- ➔ Select "**Integration Logs**" to open up the page and access the following information:
  - ◆ Every record that's been integrated along with whether the integration completed or failed
  - ◆ Additional information about the record, including the mapping, the user who did the integration, and whether it's a manual or scheduled integration
  - ◆ We also provide a link back to the record in GovSpend
  - ◆ For Failed records, users can hover over the "Failed" badge to view the associated error message
- ➔ More enhancements to come!

Review our help documentation for additional details



CRM Logs

Date and T...	Status	Module	Integration	Mapping	Type	Record	Created By
06/11/2025 06:57 PM	Failed	Contacts	Salesforce	Contact → Contact	Manual	Melissa Lala-Deliman	Kathryn Sanders
06/11/2025 06:57 PM	Failed	Contacts	Salesforce	Contact → Contact	Manual	Kimberlee Hooper	Kathryn Sanders
06/11/2025 06:57 PM	Failed	Contacts	Salesforce	Contact → Contact	Manual	Gina Vilchez	Kathryn Sanders
06/11/2025 06:55 PM	Complete	Contacts	HubSpot	Contact → Companies	Manual	Lisa Johnson	Kathryn Sanders
06/11/2025 06:53 PM	Complete	Spending & POs	Salesforce	Line Item → Opportunity	Manual	To Pay Claims - 11/26/24	Kathryn Sanders
06/11/2025 06:53 PM	Complete	Spending & POs	Salesforce	Line Item → Opportunity	Manual	to Pay Claims - 12/3/24	Kathryn Sanders
06/11/2025 06:51 PM	Complete	Spending & POs	Salesforce	Line Item → Opportunity	Manual	testing Description	Kathryn Sanders
06/11/2025 06:51 PM	Complete	Spending & POs	Salesforce	Line Item → Opportunity	Manual	testing Description	Kathryn Sanders



06/19/2025 05:39 PM	Complete	Bids & RFPs	HubSpot	Bid → Deals	Manual	O-RING	Kathryn Sanders
06/19/2025 05:37 PM	Failed	Contacts	Salesforce	Contact → Contact	Manual	Bruce Benshoof	Kathryn Sanders

Message: Failure in composite requests at 194570af1f84e97bbc0a8d34a8f8cbe2ffffe7c9c59b5f7819eff9e4d5a908d3. Error: Cannot deserialize instance of MailingAddress from VALUE_STRING value 333 W Camden St. or request may be missing a required field

Copy Message

06/19/2025 05:36 PM	Complete	Bids & RFPs	Salesforce	Bid → Opportunity	Manual	WEIGHT,COUN TERBALAN	Kathryn Sanders

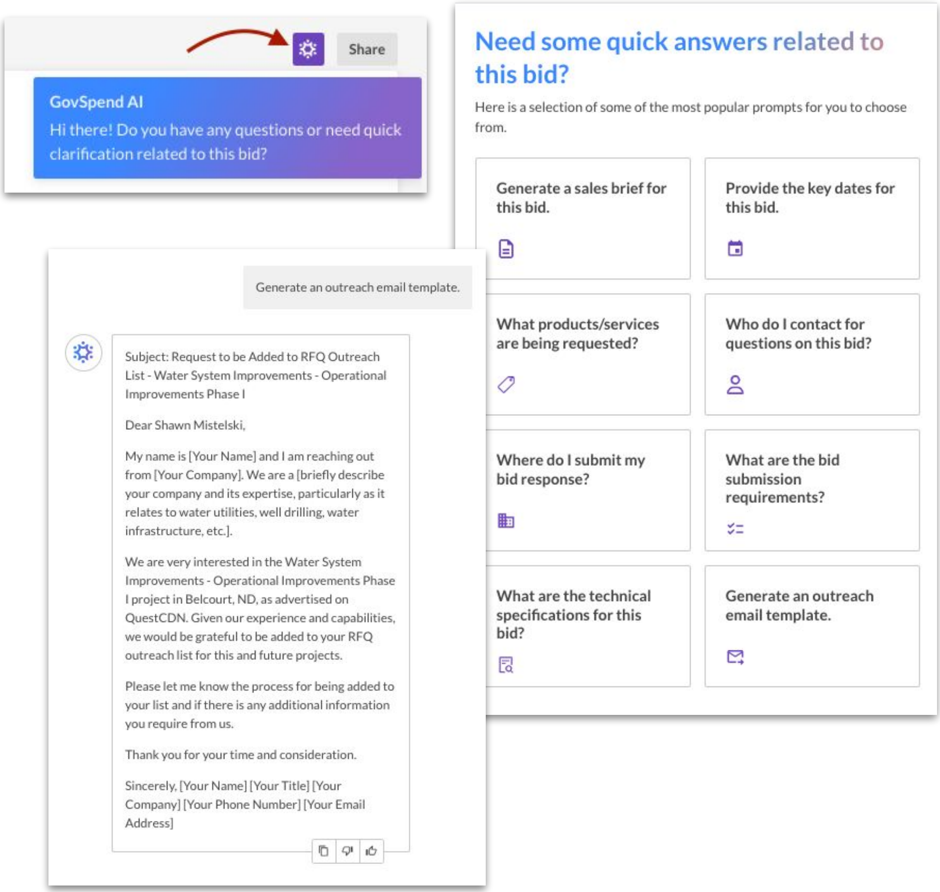
AI Prompts & Chat: Bids & RFPs, Meeting Intelligence, Contracts

We've introduced AI to help you extract the information you need more efficiently from any Bid, Contract, or Meeting Record! Use the preset prompts to get quick information about the content, like meeting attendees, key contract or bid dates, and technical specifications, OR enter in your own custom questions!

HOW TO FIND IT

- Navigate to the Bids, Meetings, or Contracts modules
- Open up a bid, contract, or meeting detail page
- Click the **purple spark** icon in the top right of the page to open up the prompt/chat feature
- Click any of the **preset prompts** to get some quick, general information about the bid, meeting or contract
- Use the **chat input** bar to enter a custom question and continue to chat!
- Note that once you enter a custom question the same features available for Bids apply:
  - The chat will be saved
  - You can use the 3 dots to rename your chat
  - Chats will be organized by date with those related to the current meeting record pinned to the top

Refer to our **help documentation** for more details!



General Search & Functionality Enhancements

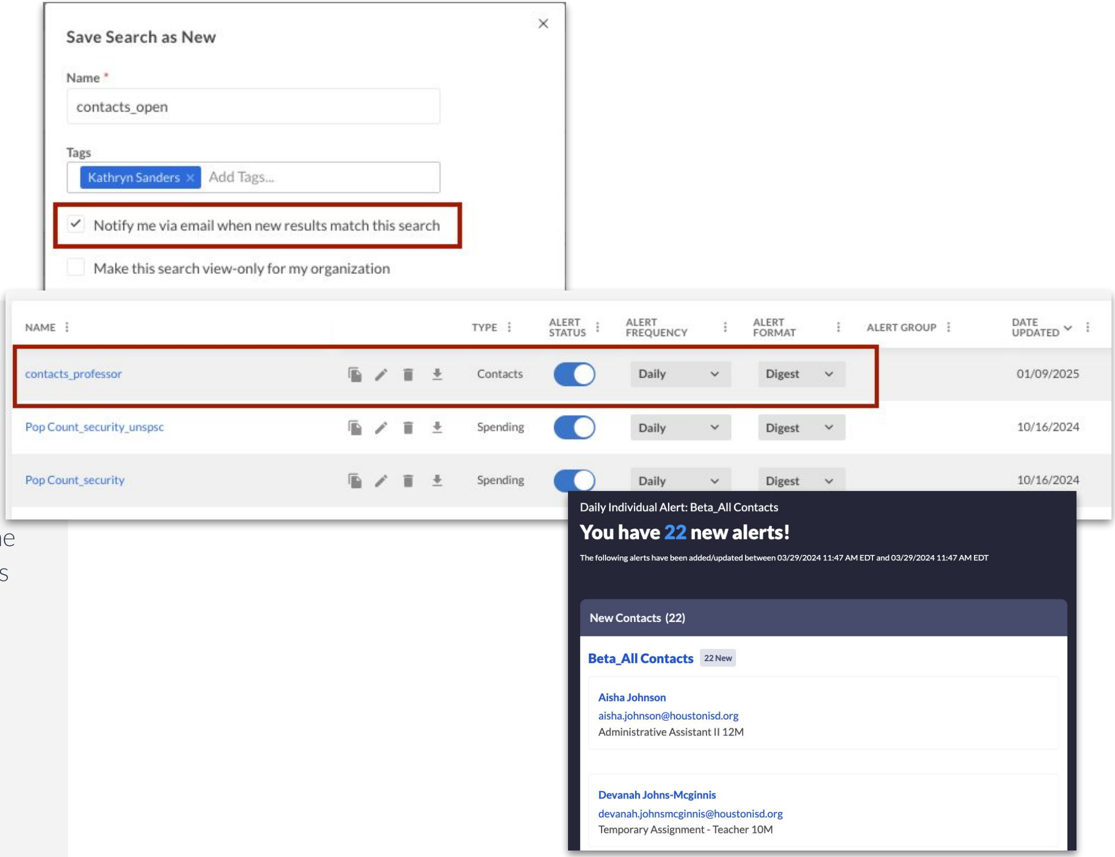
In parallel to our new feature releases, we continue to enhance the existing search functionality across the platform. The next few slides review a few of the improvements we've made this year based on customer feedback and requests.

- Saved Search Alerts in Contacts
- Update to Default Time Range in Contacts
- "Download All" option for Files
- Tagging of Saved Searches



Contacts: Saved Search Alerts

You now have the ability to set up alerts for Contact searches! New records will not flow in as consistently as other modules, but as soon as new data is available, our users can be notified. This also sets the stage for scheduled integrations for Contact Searches, a big ask for customers interested in integrating Contact data.



HOW TO FIND IT

- ➔ Navigate to the **Contacts Module**
- ➔ Perform any search or filtering and click "Save Search"
- ➔ Use the "**Notify me via email…**"check box to turn on email alerts for that search
- ➔ If you have a Contacts search loaded, you can also use the **alerts toggle** at the top right of the page to turn on alerts
- ➔ Navigate to the **Saved Searches** page to configure your alert settings for that search OR toggle alerts on
- ➔ ***Note:*** *Contact data does not flow in as regularly as other modules.* ***Refer here*** *for details on contact ingestion.*

Review our **Alerts Help Documentation** for further details on turning on and configuring alerts.

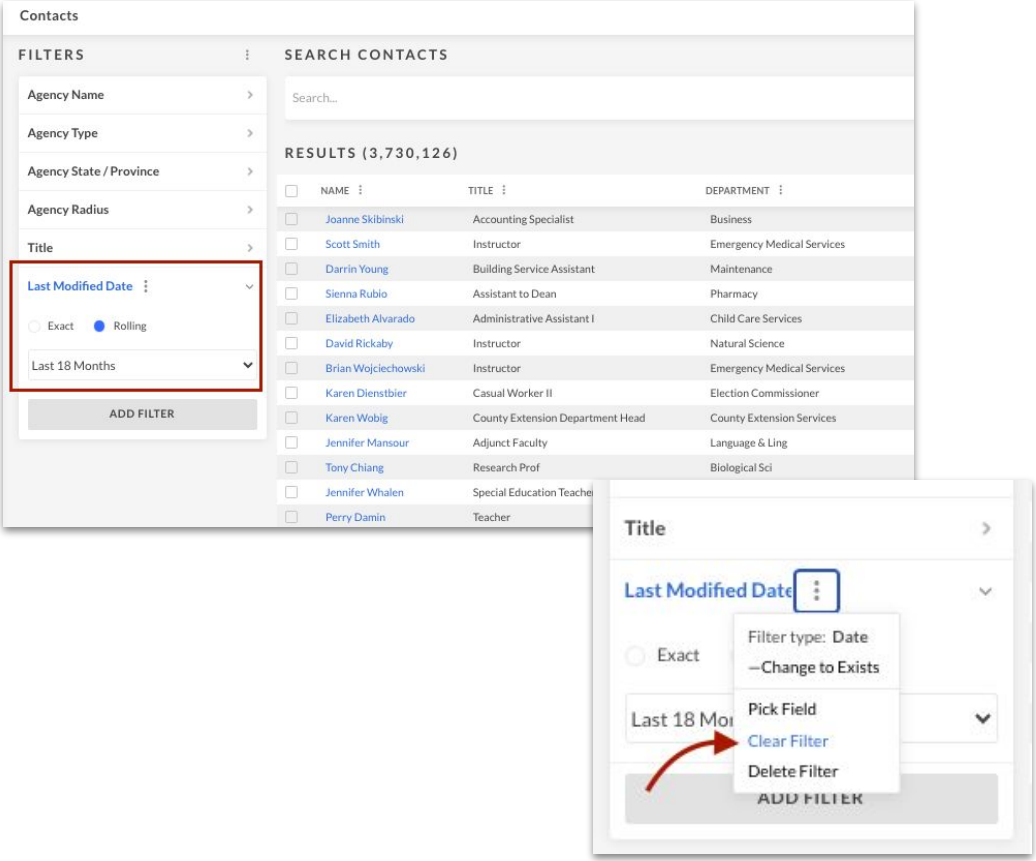
Contacts Module: Default Results to “Last 18 Months”

We’ve updated the Contacts module default settings to show results created or updated in the *last 18 months*. This ensures that your search includes more reliable data, leading to improved outreach efforts.

HOW TO FIND IT

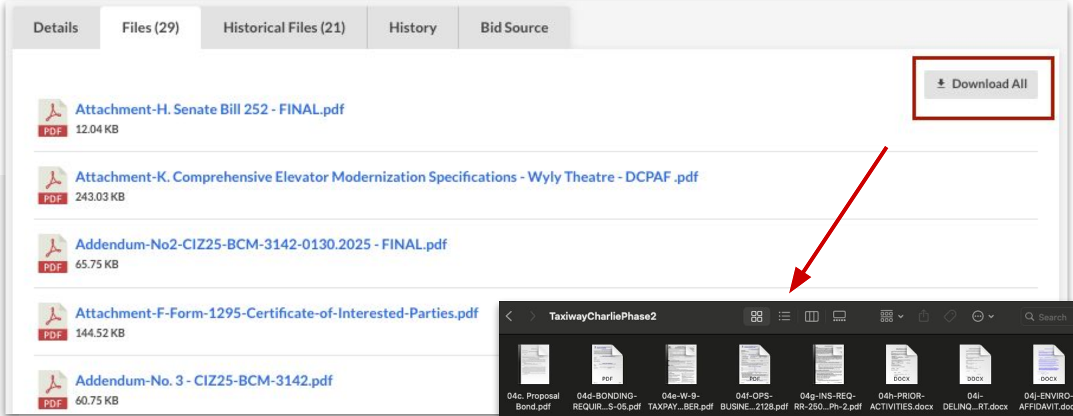
- ➔ Navigate to the **Contacts Module**
- ➔ Observe that we’ve added a new default filter “**Last Modified Date**”
- ➔ The filter is defaulted to “**Last 18 Months**”
    - ◆ This means customers will start additional search refinement on records that have been created or updated within the Last 18 Months
- ➔ Click the 3 dot menu and “**Clear Filter**” to search the entire database of contacts

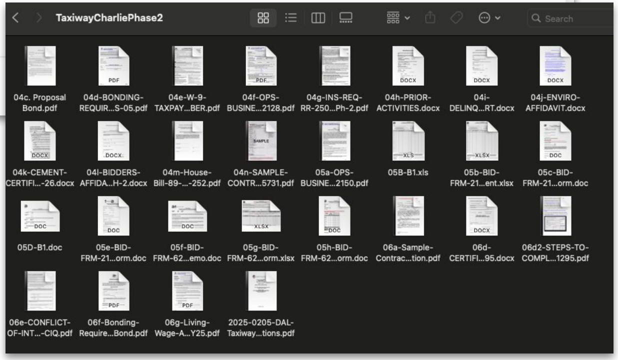
Refer to updated **help documentation** for more details



Download All: For Bids, Contracts, Meetings, Sam Opportunity Attachments

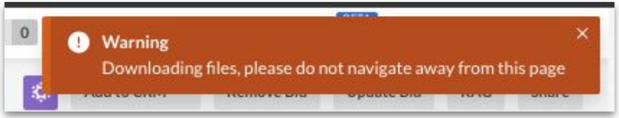
For any bid, contract, or meeting record with files, you now have the ability to download all files at once with the click of a button! No need to individually click, open, and download each file one at a time!





HOW TO FIND IT

- ➔ Navigate to a detail page for any of the following modules (make sure the detail record has documents):
  - Bids
  - Contracts
  - Meetings
  - Sam Opportunities
- ➔ For Bids & Contracts click the "**Files**" tab
- ➔ For Meetings make sure you're on the documents tab if the record also has a transcript
- ➔ For Sam Opportunities scroll to the document section
- ➔ Find and click the "**Download All**" button
- ➔ A warning message will appear letting you know the download is in process and not to navigate away from the page
- ➔ Once complete you'll get a green success message and be able to open a folder or zip with all the files downloaded to your computer

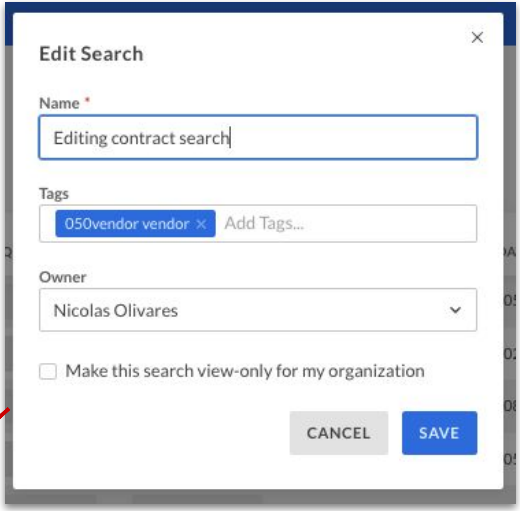


Saved Searches: Update to Tagging Saved Searches

Existing saved searches will no longer get tagged with a user name when they are edited/updated. This is to help with better saved search management across the Organization.

HOW TO FIND IT

- ➔ Navigate to the **Saved Searches** page
- ➔ Click the edit icon OR open up the saved search
- ➔ **Edit** the search by changing the name or tags OR modify the actual search criteria in the saved search
- ➔ Click **Save**
- ➔ Go back to the Saved Searches page if you aren't already there
- ➔ Note that no new tag has been added
- ➔ "**Last Modified By**" can be used instead to reference who last updated the search
- ➔ A tag will still be added when creating a new search or duplicating a search



- **CRM Help Documentation**
  - Preparing for CRM Integration
  - CRM Demo Video
  - What's New with Integrations
- **AI Prompts & Chat:**
  - AI Prompts & Chat in Bids, Meetings, & Contracts
- **Release Notes with Step By Step Guidance**
  - May 2025
  - April 2025
  - March 2025
  - February 2025
  - January 2025

RESOURCES

GovSpend Help Center

Questions?

Please reach out to your Relationship Manager or our Support team at
Support@govspend.com
954-420-9900

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Thank you!

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