



govSpend

GovSpend Integrations

Salesforce Overview

Agenda

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- Functionality (demo)
- What's Next on the Integration Roadmap?
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Why a CRM Integration?

There are many benefits to integrating GovSpend data directly into your CRM. Here are a few we feel are most important.

- **Auto-Sync Data** – Eliminate manual entry with real-time GovSpend-Salesforce integration.
- **Smarter Targeting** – Prioritize accounts using real-time government spending insights.
- **Faster Sales Cycles** – Reduce research time with in-platform purchasing trends and contacts.
- **Better Pipeline Tracking** – Forecast revenue with spending and contract visibility.
- **More Wins** – Personalize outreach with relevant procurement data.

Integration 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 April 2025
 - Microsoft Dynamics & Others - Q2+

The screenshot displays the GovSpend Integrations interface. The top section, titled 'Integrations', shows two active CRM connections: Hubspot and Salesforce, both with green checkmarks indicating successful syncs. Below this, the 'Contact Details' section for 'Luz Morales, Procurement Officer' is shown. A red box highlights the 'Add to CRM' dropdown menu, which offers two options: 'Salesforce: Contact to Lead' and 'Salesforce: Contact to Contact'. The bottom section, 'Related Agency Items', contains a table with columns for Contacts, Open Bids, Closed Bids, Line Items, Open Contracts, and Meeting Intelligence. The table lists several contacts, including Aaron Julian, Abebi Ahmed, Agyeman Ababio, and Akrem Awad, with their respective titles, departments, emails, and phone numbers.

Contacts (367)	Open Bids (19)	Closed Bids (7,961)	Line Items (12,071)	Open Contracts (847)	Meeting Intelligence (No Results)
Aaron Julian	Maintenance Supervisor	Towson District Court	aaron.julian@maryland.gov	(410) 512-2074	
Abebi Ahmed	Fiscal Accounts Technician II	Payroll	abebi.ahmed@maryland.gov	(410) 767-6283	
Agyeman Ababio	Procurement Officer	Construction and a & E Contracting	agyeman.ababio@maryland.gov	(410) 767-0689	
Akrem Awad	Project Manager	Project Management Team	akrem.awad@maryland.gov	(410) 767-7970	

Configuration & Mapping

Simple “Configuration Wizard” to help you select what data you want to integrate from GovSpend and how you want to map it.

Authentication:

- Simple OAuth authentication to establish connection with your CRM
- Only one user’s credentials required to set up the GovSpend connection to your CRM instance

Mapping in 3 Easy Steps:

- Select the GovSpend data you’re interested in integrating (i.e. Bids, Contacts, etc.)
- For each dataset/module, select the type of record/object(s) you’d like to create in your CRM (i.e. create an opportunity from a bid)
- For each dataset/module combination, set up how you want the GovSpend fields to map to the record in your CRM

Did you know?

- Custom Objects and Custom Fields that exist in your CRM will be available for mapping
- We support the capability to send over document attachments as URL’s
- You can revisit and make changes to your mappings at anytime!

The image displays three sequential screenshots of a configuration wizard, numbered 1, 2, and 3, illustrating the process of integrating GovSpend data with a CRM.

Step 1: GovSpend Record Types

This screen shows the selection of GovSpend record types to integrate. A sidebar on the left lists the steps: Authenticate (checked), GovSpend Record Types (current), Record Type Mapping, and Field Mapping. The main area displays a grid of record types with their field counts:

Record Type	Fields
Agency Meeting	31 fields
Bid	25 fields
Contact	47 fields
Contract	55 fields
Line Item	52 fields

The "Bid" record type is selected. A "Previous" button is at the bottom left.

Step 2: Record Type Mapping

This screen shows the mapping of selected GovSpend record types to CRM record types. The sidebar shows the steps: Authenticate (checked), GovSpend Record Types (checked), Record Type Mapping (current), and Field Mapping. The main area displays a table with "Source" and "Destination" columns:

Source	Destination
Bid	Opportunity
Contact	Contact
Contact	Lead

An "Add to Mapping" button is at the top right. "Cancel" and "Next" buttons are at the bottom right.

Step 3: Field Mapping

This screen shows the mapping of specific GovSpend fields to CRM fields. The sidebar shows the steps: Authenticate (checked), GovSpend Record Types (checked), Record Type Mapping (checked), and Field Mapping (current). The main area displays a table with "Required Fields" and "Optional fields" sections:

Required Fields	Optional fields
Salesforce Opportunity Name *	
Name	
Salesforce Opportunity Close Date *	
Close Date	
Salesforce Opportunity Stage Name *	
Stage Name	

The "Bid" record type is selected. A "Previous" button is at the bottom left. "Cancel" and "Finish" buttons are at the bottom right.

Integration Functionality

Choose how you integrate records from a few different options based on what works best for you and your teams.

Single Record Integration (Available Now)

- Directly integrate a record in GovSpend to your CRM with the click of a button from a Details page
- Dynamic UI based on configured mapping

Batch Record Integration (Available Now)

- Select multiple records at once from a saved search and integrate in batch to your CRM
- Dynamic UI based on configured mapping

Automated Integration on a Schedule (Coming Soon!)

- Automatically push new or updated records from a saved search to your CRM on a schedule
- For each saved search, select how you want to map the record in that search to your CRM
- Available Schedules: Immediately, Daily, Weekly (same options supported today for saved search email alerts)

Bid Details

Technical Consultant: Feasibility Assessment for **Energy** Technologies — #UNDP-KOS-00363

Due in 8 days Due Date: 03/06/2025 Posted: 02/21/2025 Date Updated: 02/21/2025 Agency Department: UNDP-KOS/Kosovo, UNSCR 1244 (1999)

[View on agency site](#)

Summary

Details: Home Technical Consultant: Feasibility Assessment for **Energy** Efficiency Technologies Technical Consultant: Feasibility Assessment for **Energy** Efficiency Technologies Procurement Process IC - Individual contractor Office UNDP-KOS - Kosovo, UNSCR 1244 (1999) Deadline 06-Mar-25 @ 11:30 AM (New York time) Published on 21-Feb-25 @ 12:00 AM (New York time) Reference Number UNDP-KOS-00363 Cont...

OPEN BIDS (20,695) Sort By: [Relevance](#) Due Date [HIDE 3 RESULTS](#) [ADD TO CRM](#)

Bids	Agencies	DUE DATE	AGENCY NAME	TITLE	DESCRIPTION	DOCUMENTS COUNT	BID NUMBER
20,695	2,804						
<input type="checkbox"/>							
<input checked="" type="checkbox"/>		03/04/2025	CPS Energy, Texas	Telecom Expense Management Auditing and Inventory Management...	Details: Bid Solicitation Information Title/Brief Description Telecom Expense Management Auditing and Inventory...	3	7000197270
<input checked="" type="checkbox"/>		03/06/2025	Agency for International Development...	Technical Consultant: Feasibility Assessment for Energy Efficiency...	Details: Home Technical Consultant: Feasibility Assessment for Energy Efficiency Technologies Technical Consultant...	4	UNDP-KOS-00363
<input checked="" type="checkbox"/>		03/19/2025	CPS Energy, Texas	General Construction Services Large Projects Real Estate	Details: Bid Solicitation Information Title/Brief Description General Construction Services Large Projects Real Estate...	3	7000197354
<input type="checkbox"/>		03/15/2025	Department of International Development...	Draft National Landscape of High-Impact Crosscutting Opportunities for Next...	Details: Contact Harsh Materials RFI Responses harshmaterialsrfi@ee.doe.gov Agency Phone 202 287-1878 Description...	3	DE-FOA-0003507
			Department of	SEEDING CRITICAL	Details: Contact ARPA-E CO Agency Phone		

NAME	TYPE	CRM INTEGRATION	ALERT STATUS	ALERT FREQUENCY	ALERT FORMAT
Bids_Energy	Bids	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily	Digest
[SI] Spending	Spending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily	Digest
beta contracts daily-individual	Contracts	<input type="checkbox"/>	<input type="checkbox"/>	Daily	Individual

What's Next on the Integration Roadmap

There are a lot of exciting enhancements on the horizon for our integration capabilities, as well as adding support for additional CRM systems. Below is a preview of what's in store. Note that our roadmap is highly dependent on your feedback and very subject to change!

Q1 2025:

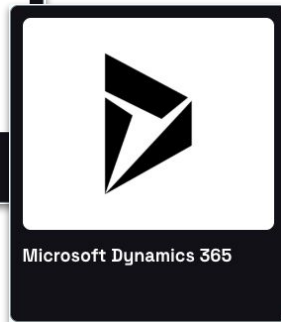
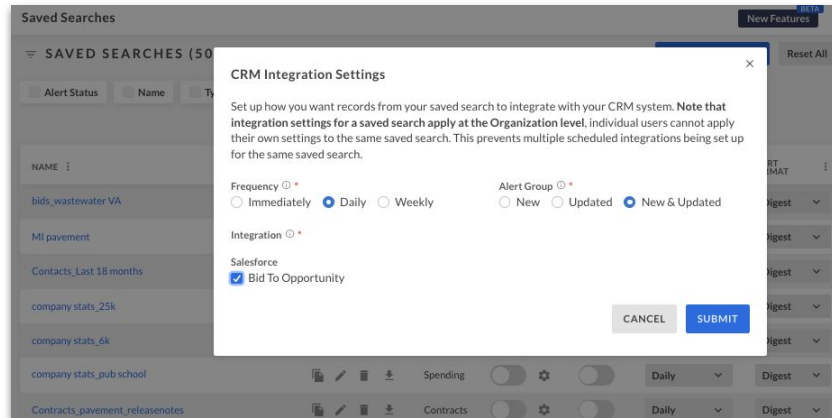
- Automated Saved Search Integrations on a Schedule (in progress)
- Addition of customer requested fields for integration
- Add visual indication in GovSpend that a record has been integrated
- Begin beta phase for Hubspot Integration

Q2 2025:

- Full rollout of Hubspot Integration
- Add Integration capabilities to Lists
- Build integration for Agencies & Vendors
- Develop Microsoft Dynamics Integration

Q3 & Beyond:

- Support additional CRM systems
- Enhanced integration management and tracking within GovSpend



- Have your IT team review the integration security documentation
- Connect with your Salesforce Admin to determine feasibility and timeline to set up the integration
- Think about how you use GovSpend today and what data you want to integrate
- Review workflow and use cases with your teams who action the data in Salesforce

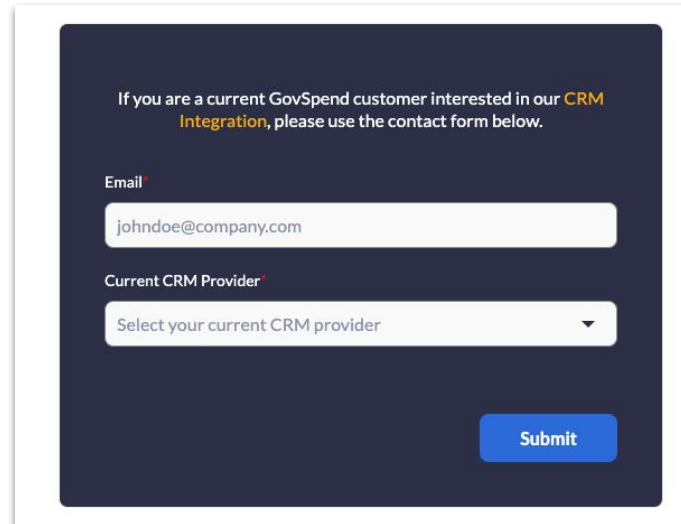
BE PREPARED

Setting up the actual integration is very simple and efficient, but it takes time to think through the best way to bring GovSpend data into your CRM so your teams can action. Review these recommendations to prepare you and your teams for a seamless set-up and the ability to create immediate value.

NEXT STEPS

Interested in moving forward?
Follow these steps to start the
process...

- Review our [resources](#) for a full overview of GovSpend's integration capabilities
- Fill out [form](#) at the bottom of any CRM help article to get on a list for further information.
- Connect with your Relationship Manager!



If you are a current GovSpend customer interested in our **CRM Integration**, please use the contact form below.

Email *

johndoe@company.com

Current CRM Provider *

Select your current CRM provider ▼

Submit

- [Preparing for CRM Integration](#)
- [Integration Security Documentation](#)
- [CRM Demo Video](#)
- Help Documentation:
 - [Configuring your Integration](#)
 - [Performing Integrations](#)
 - [Salesforce Integration Details](#)
 - [Available Fields by Module](#)

RESOURCES



Thank you!

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