BidPrime

BidPrime + Salesforce

Export BidPrime's comprehensive bid coverage into your Salesforce CRM. Clients upgrading to BidPrime's Premium Data Service plans have the ability to connect and integrate bids with Salesforce.

Quick export of BidPrime bids to Salesforce

All in one quick click, within your BidPrime Inbox or Search results. When connecting your BidPrime account to Salesforce, you have the ability to easily export one bid or a list of many bids to your Salesforce CRM.

Visibility of export actions by other account users

Eliminate duplicate work and inefficiency. Easily view when BidPrime bids are exported to Salesforce by any other users within your account.
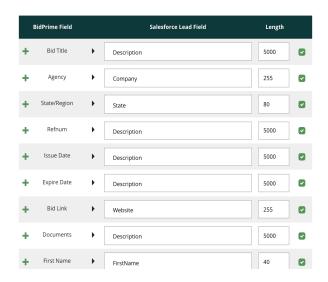

Choose to export to Salesforce Leads or Opportunities

In your BidPrime Salesforce Connector settings, choose either Leads or Opportunities from the dropdown as the default export function for you or other users.

Custom BidPrime + Salesforce field mapping

Default Salesforce field mappings are already preselected for you, and are completely customizeaable for each user as designated by your Salesforce Admin. Simply ensure BidPrime's fields match directly to your organization's Salesforce fields by renaming specific fields used by your organization or inputting fixed field values to be exported with each bid.

BidPrime Field	Salesforce Lead Field	Length	
Bid Title	Description	5000	✅
Agency	Company	255	✅
State/Region	State	80	✅
Refnum	Description	5000	✅
Issue Date	Description	5000	✅
Expire Date	Description	5000	✅
Bid Link	Website	255	✅
Documents	Description	5000	✅
First Name	FirstName	40	✅

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salesforce

Export all of the following

› Opportunity or Lead
› Bid Title
› State / Region
› Reference Number
› Issue Date
› Expire Date
› Link to Bid
› Link(s) to Bid Documents
› Agency Contact First Name
› Agency Contact Last Name
› Agency Contact Email
› Agency Contact Phone
› Agency Postal Code
› Agency City
› More Details / Description
› Other Fixed/Custom Fields

Secure and compliant

Access to Docs on Demand within Salesforce

Empower your team to explore data

Control and customization