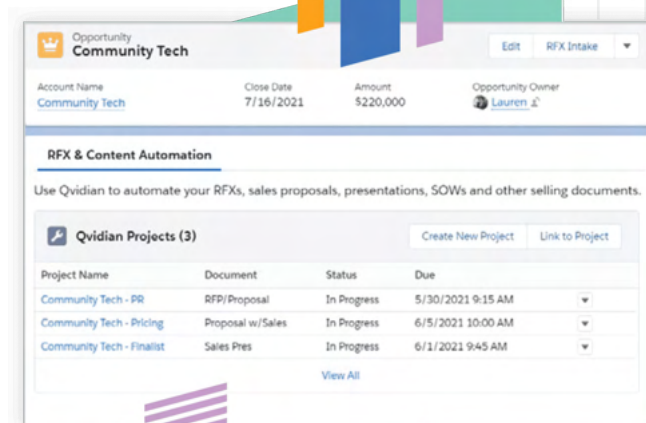


Salesforce Integration

Create, organize, and update Qvidian proposals, presentations, and sales documents from Salesforce.



Work with Qvidian directly from Salesforce opportunities, accounts, contacts, and custom objects.



Get going fast, launch projects in Salesforce

Create and update Qvidian projects from Salesforce and prefill proposals and sales documents with trusted CRM data.

Insert company details, contacts, price lists, and more from Salesforce to save time and prevent cut and paste errors.

When Salesforce data changes, update all associated Qvidian proposals and sales documents in one click.



Track and report on projects in Salesforce

Link Qvidian projects to Salesforce to view all related sales documents and insights in context from your CRM.

From Salesforce, view all past and ongoing Qvidian projects related to accounts, contacts, and opportunities.

Enhance your CRM reporting by connecting Qvidian's projects and sales documents analytics with Salesforce.



We worked with Professional Services to configure Qvidian's Salesforce integration and single sign-on. The level of support was above all expectations!

Arsen Chervony
Technical Program Manager, F5



Included for licensed Qvidian users

Qvidian's Salesforce integration is included at no additional cost for all licensed users. Qvidian admins can access the self-service installation guide from Qvidian's Help Center or contact their CSM for details. Salesforce admins can download the Qvidian app from the Salesforce AppExchange.



Tailor and enhance your integration

Qvidian's Professional Services team can help you unlock even more value by tailoring this integration. For example, when pre-configured, Qvidian can automatically suggest the most relevant content to include in documents based on Salesforce record fields, like industry and location.



Ready to give Qvidian's Salesforce integration a try?

Let us show you what you can do with this included integration.

[Request a demo](#)

Upland Qvidian automates away the tedious and frustrating parts of RFP response and proposal processes. With Qvidian, sales and proposal teams can collaborate effortlessly to quickly deliver polished and compliant proposals, presentations, and sales documents. With an unmatched 40+ years of experience, more than 1,000 companies and 200,000+ users worldwide rely on Qvidian to meet deadlines, tame proposal content chaos, and win more deals.

