

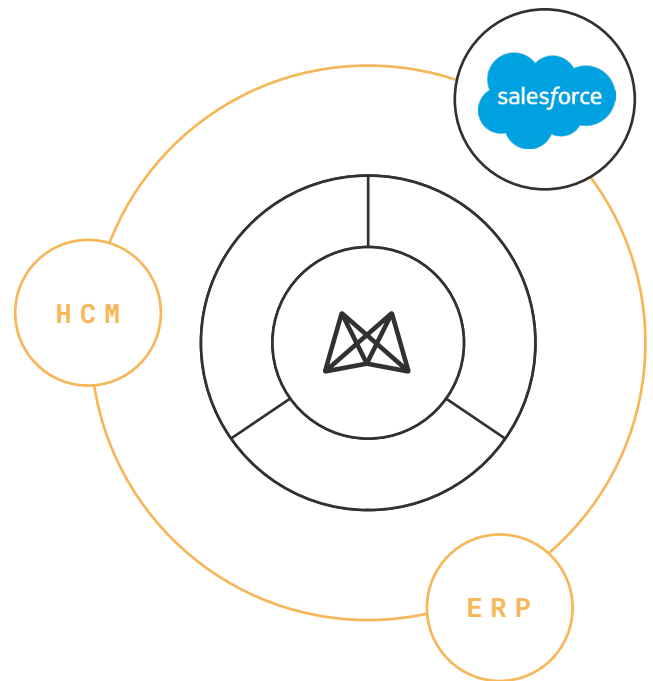
# Salesforce Integration

Mavenlink's Salesforce integration automates project creation from Opportunities and provides Salesforce users with key information about Mavenlink projects.

The integration also facilitates cross-platform communication within a project.

## **BENEFITS**

- Accelerate project kickoff by planning for deals in the pipeline
- Accurately forecast resourcing needs with visibility into the pipeline
- Give relationship owners real-time visibility into project progress
- Improve predictability and profitability of client engagements
- Eliminate duplicate project and communication updates with Chatter support



## **AVAILABILITY & ACCESS**

This integration is available to all Mavenlink Premier and Enterprise customers. The integration is available on the Salesforce AppExchange for Salesforce Enterprise Editions only.

Once the integration has been activated by a Solutions Engineer, the integration will be administrator-configurable using the Mavenlink Integrations web-based interface.

# GET A COMPLETE VIEW OF YOUR PIPELINE AND PROJECTS

## Functional Capabilities

- A Mavenlink project is created when a Salesforce opportunity reaches a specified stage
- Summary information about that project feeds back to Salesforce
- Projects sync to a custom Mavenlink Project object in Salesforce
- Tasks sync to a custom Mavenlink Task object in Salesforce
- Resource assignment time and rate rolls up in Salesforce object, so sales can view approximate project cost
- Project communication is synced between Mavenlink's Activity Feed and Salesforce Chatter so updates can be made in either communication platform

### CONFIGURATION OPTIONS

Salesforce opportunity stage(s) automatically create a Mavenlink project

Specific template can be applied to an automatically created project

Opportunity stage -> Project status mappings

Whether or not to create Business Development project earlier in the sales lifecycle

- A template to be applied to this project
- The stage that should create this project

Schedule data sync between Mavenlink and Salesforce (most frequent sync is every hour)

# Field Mappings

## Projects

Mavenlink Field	Direction	Salesforce Field
Project Title	▶	Opportunity Name
Project Budget	▶	Opportunity Amount

## Custom Field Objects

Mavenlink Field	Direction	Salesforce Field
Archived	◀▶	Read, Update
Budgeted	◀▶	Create, Read, Update
Budget Used	▶	Read
Default Rate	▶	Read
Description	◀▶	Create, Read, Update
Effective Due Date	▶	Read
Title	◀▶	Create, Read, Update
Over Budget	▶	Read
Percentage Complete	▶	Read
Budget	◀▶	Create, Read, Update
Start Date	◀▶	Create, Read, Update
Status	▶	Read

 [LEARN MORE](#)

Call (800) 860-9544 or visit [mavenlink.com/integrations](https://mavenlink.com/integrations)

