

# Building Connected Integration

Streamline data management with ProjectMark's Building Connected integration. Sync data effortlessly for efficient decision-making.

## Why

The barrier preventing your team from maximizing a return on investment from your CRM and making revenue growing, data driven decisions, is data management.

Our integration with Building Connected is designed to prevent duplicate data entry, maximize efficiency and foster data driven decision making.

## Challenge

Subcontractors are spending too much time managing opportunities in their Building Connected account and then duplicating this information in their ProjectMark CRM.

This creates major inefficiencies and inconsistent and inaccurate data between platforms.

## Solution

Data synchronization between platforms. Our integration with Building Connected removes double data entry and ensures real time access to all of your Building Connected Opportunities within your ProjectMark account.

Any updates made in your Building Connected account immediately take affect within ProjectMark.



# How We Do It

ProjectMark seamlessly syncs opportunity information from Building Connected to ProjectMark.

Each opportunity record contains more than just **Project Information** and **Financials**:

It contains **Contact** and **Company** information for your General Contractor, Architect, Engineer and Project Owner, which seamlessly updates your Contact/Company records in ProjectMark including the fact that you pursued this opportunity with the GC and what the outcome was.

It contains the **Team Member** information of the team you assigned to lead the opportunity, which updates your team and deal owner records in ProjectMark.

It contains **Competitor** information about who you competed against and what the outcome was. This information updates your corresponding Competitor/Contact records in ProjectMark.

As well as syncing data from Building Connected to ProjectMark, the integration facilitates automatic workflows within ProjectMark:

When an **Opportunity** is won within Building Connected, it automatically moves to the appropriate “Won” stage within ProjectMark and instinctively creates a new **Project** within the DataHub, again removing double data entry and ensuring consistency of data from from an Opportunity to a Project.

As we build out our integrations with **Accounting/ERP** and **Project Management** software, this step will also automate the creation of new projects in each respective system.

## Integration Requirements

The Building Connected user account you intend to integrate with ProjectMark must possess permission to access all opportunities/bids listed on the Bid Board.

Additionally, your company account must have the following subscription type:

**OPPORTUNITIES:**  
Bid Board Pro subscription

**CONTACTS:**  
Bid Board Pro subscription

**PROJECTS:**  
Pro subscription

**COMPANIES:**  
Pro subscription



# How to Set It Up

Setting up the integration is simple. We break it down into 4 easy steps:

## 1 Configure

Sign into your AutoDesk Construction Cloud account and select which ProjectMark modules you'd like to integrate with Building Connected.

### Modules

Select all modules that will integrate with Building Connected

- ☒ Opportunities
- ☒ Projects
- ☒ Companies
- ☒ Team Members
- ☒ Contacts

### Choose your sync direction

☒ Building Connected → Data sync only to ProjectMark ☐ ProjectMark

### Resolve data conflicts

Choose which app will overwrite the other when it's unclear which app has the most up-to-date information.

## 2 Stage Mapping

Map your Building Connected bid stages to corresponding bid stages in ProjectMark

BUILDING CONNECTED STAGES		PROJECTMARK STAGES	SYNC
Undecided	→	01 - Lead	<input checked="" type="checkbox"/>
Accepted	→	02 - Prequalification	<input checked="" type="checkbox"/>
Submitted	→	03 - Invited to Bid	<input checked="" type="checkbox"/>
Won	→	04 - RFP in Progress	<input checked="" type="checkbox"/>
Lost	→	05 - Submitted	<input checked="" type="checkbox"/>
Declined	→	06 - Shortlisted	<input checked="" type="checkbox"/>
Other	→	07 - Interview	<input checked="" type="checkbox"/>

## 3 Field Mapping

Map the individual data fields from your Building Connected opportunity to the corresponding data fields within ProjectMark. Only sync the data you want to carry over to ProjectMark.

BUILDING CONNECTED OPPORTUNITY FIELDS		PROJECTMARK OPPORTUNITY FIELDS	SYNC
State	→	Stage	<input checked="" type="checkbox"/>
Project Name	→	Title	<input checked="" type="checkbox"/>
Due Date	→	Due Date	<input checked="" type="checkbox"/>
Location	→	Address	<input checked="" type="checkbox"/>
Expected Start	→	Construction Start Date	<input checked="" type="checkbox"/>
Expected Finish	→	Construction Finish Date	<input checked="" type="checkbox"/>
Project Size	→	Square Foot	<input checked="" type="checkbox"/>

## 4 Trigger Events

Triggers and actions allow you to control what data flows from Building Connected to ProjectMark and when.

Create specific **Trigger** Events such as when an opportunity is:

- Created →
- Updated →
- Deleted →

And then create corresponding **Actions** in ProjectMark based on these triggers, such as:

- Create a New Opportunity
- Update an opportunity
- Delete an opportunity

**When**  
This happens with the module selected

**Trigger**

**MODULE**

**EVENT**