

Wrike for Salesforce

AVAILABILITY - LEGACY PLANS

Free	Professional	Business	Enterprise
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AVAILABILITY

Free	Professional	Business Plus	Enterprise Standard	Enterprise Pinnacle
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Overview

Account admins can integrate Wrike with Salesforce.

Salesforce is a popular CRM solution used by teams worldwide. Wrike is integrated with Salesforce so you can manage client projects from within Salesforce. This makes collaboration between sales or other customer-facing teams and teams using Wrike easier, faster, and more transparent. More information on Salesforce is available [here](#).

Once the integration is set up, you can check task status from within Salesforce. Any object in Salesforce can be linked to a Wrike project or folder so you can work in Wrike and any changes that you make are instantly reflected in Salesforce.

Both Salesforce Classic and Salesforce Lightning are supported.

Benefits of Salesforce-Wrike integration

- No need to toggle between systems because Salesforce users can work exclusively in Salesforce and still communicate easily with their customers about work managed in Wrike.
- You have greater transparency and accountability so you don't need to chase down your colleagues for updates on pending tasks. You can check task status from either Salesforce or Wrike.
- You can automate creation of projects and tasks in Wrike for Salesforce records using built-in templates or Wrike Integrate.

When you integrate Wrike with Salesforce:

- Every record page in Salesforce (on an object where the integration is enabled) has a Wrike widget. You can select or change a project or folder the widget shows linked tasks and subfolders from. From there, you can access tasks and check their status.
- If the project or folder is not selected for the Salesforce record, you can create it from the widget and populate it with a template set by admin.

The integration between Wrike and Salesforce is customizable, which means that you can tailor it to suit your needs by selecting which Salesforce objects (e.g., Lead, Opportunity, Account, Subscription) you want to link with Wrike. On objects where the integration is enabled, record pages will have the Wrike widget, and you can link Wrike tasks with those records. Record pages on objects where the integration is not enabled will not have the widget.

What's Next?

- [Setting Up the Integration with Salesforce](#)