



GoCanvas Integrations 101

Unlock the Possibilities

Connie Leeper, Sr. Director of Technical
Solutions
Tim Kelly, Integrations Manager





Connie Leeper
Sr. Director of Technical Solutions



Tim Kelly
Integrations Manager

GoCanvas

Your All-in-One Digital Solution for Field Work

Our Mission

At GoCanvas, we **simplify field work** by replacing paper processes with digital solutions that streamline inspections, work orders, scheduling, and reporting—boosting efficiency, compliance, and safety.

Key Features

- **Customizable Digital Forms:** Easily create and modify forms to meet specific business needs.
- **Dispatch & Scheduling:** Assign and manage tasks efficiently in real-time.
- **Image & Video Capture:** Enhance reports with multimedia directly from the field.
- **Offline Access:** Collect data without internet connectivity; sync when back online.

97% Customer satisfaction score

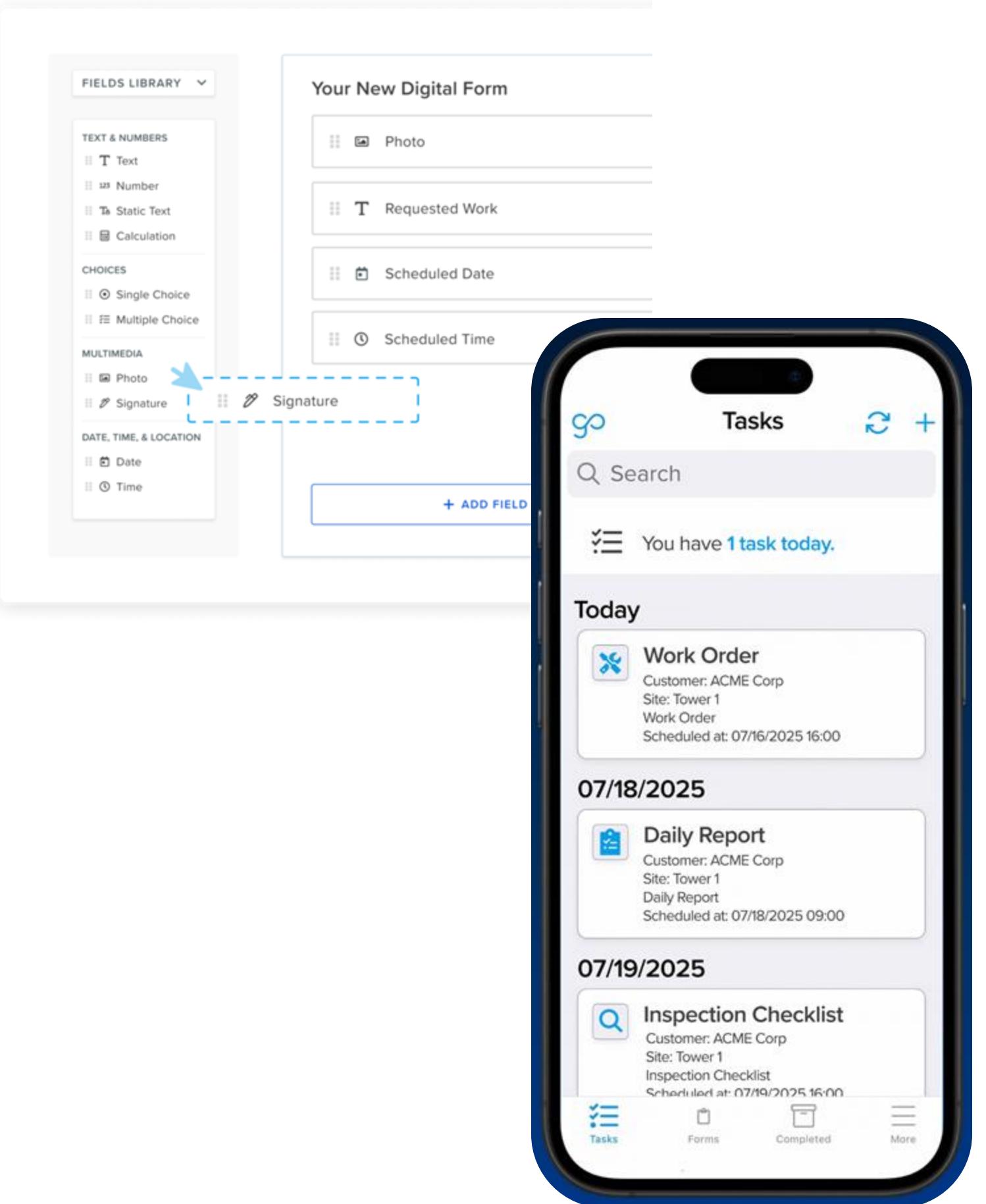
Users report an average annual time savings of \$52K and a 34% increase in productivity



GoCanvas

Forms are the currency to action multiple use cases

- Field worker mgmt (geo / time tracking)
- Safety & Compliance
- Inspections & Quality Control
- Work Orders, Estimates, Invoices, Billing
- Time & Materials Tracking
- Job Scheduling & Planning



GoCanvas

What problems are we solving?

Conquering Operational Chaos

- Inconsistent documentation
- Complex state and local labor laws
- Time/productivity lags
- Budget tracking and project overrun
- Scheduling
- Reputation management



A single solution that makes order out of chaos.

Job Site Risk Mitigation & Compliance

- Constant pressure to comply with regulations that change
- Struggle to stay on top of remote/dispersed field work
- Lack of a consistent gold work standard of work across all sites
- Share resources across diverse workforce



Get work done safely and securely. Tackle complex projects and collect required data automatically.

Streamlining Workflows to Drive Efficiency and Cost Savings

- Inconsistency of processes
- Accessibility
- Payroll inefficiencies
- Communication challenges
- Work orders, approvals, and real time management
- Customer service and experience expectations



Raise standards of delivery with the right tools for the job.

Integrations

Get more power out of your field data by integrating GoCanvas with your other business tools.



Why Do I Need Integrations?

Comprehensive communication: Improve communication between the office and the field with automatic updates across systems with just one action.

Efficient data collection: Remove the need to update multiple systems with the same information, saving time and effort while maintaining the integrity of the data.

Cost savings: Reduce operational costs by eliminating redundant systems and optimizing resource use.

Increased flexibility: Adapt quickly to business changes with access to all of your data in one place.

Features:

 **Automate invoices, tasks, and reports**

 **Sort and store files in cloud storage systems**

 **Update inventory levels**

 **Send notifications**

 **Dispatch jobs**

 **Synchronize customer records with CRM systems**

How Integrations Help Get the Job Done?

Seamless data import: Easily pull information from your existing systems—including customer details, projects, equipment, and estimate/ invoice information—to ensure all your data is centralized and up to date.

Effortless data updates: Push information captured in GoCanvas directly into your existing systems. This keeps customer files current, updates inventory levels, and ensures invoicing is accurate and timely.

Automated workflows: Streamline your operations by automating tasks such as sending notifications, alerts, or dispatches. Additionally, PDFs can be automatically stored in your systems once submitted, saving you time and reducing manual work.

Popular Integrations:

 **QuickBooks:** Data collected in GoCanvas can be used to generate an invoice.

 **Salesforce:** Client information populated in Salesforce can be integrated with GoCanvas.

 **SharePoint:** Store PDFs generated within GoCanvas in customers' SharePoint folders.

 **SMS:** Predefined actions will trigger an SMS to be sent to a recipient, making them aware of important updates.

“

*GoCanvas integrates with our systems, saving each supervisor 1-2 hours nightly—totaling about **25 hours saved weekly across five supervisors.***

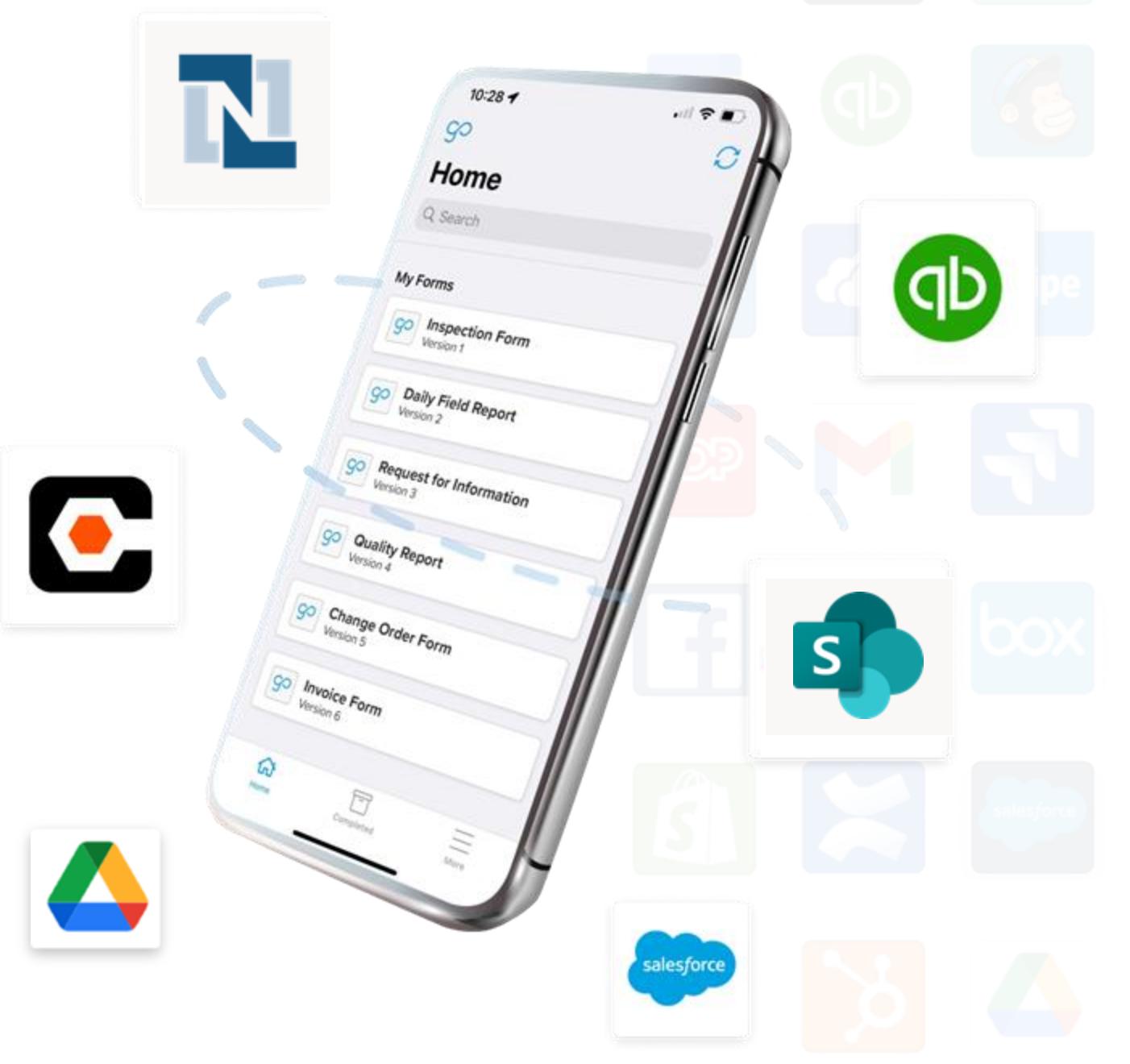
- **Dave Kramer**
Penn Line

Integrations

Possibilities

What Integrations can do:

- Automate all your business needs in one central location with tools you already use!
- **Integrations can -**
 - Improving daily performance/reduce additional steps
 - Making it easily to connect all your important information all at once.
 - Saving time, money and eliminating steps for effortless business operations!
- Ex. [Quickbooks example](#)



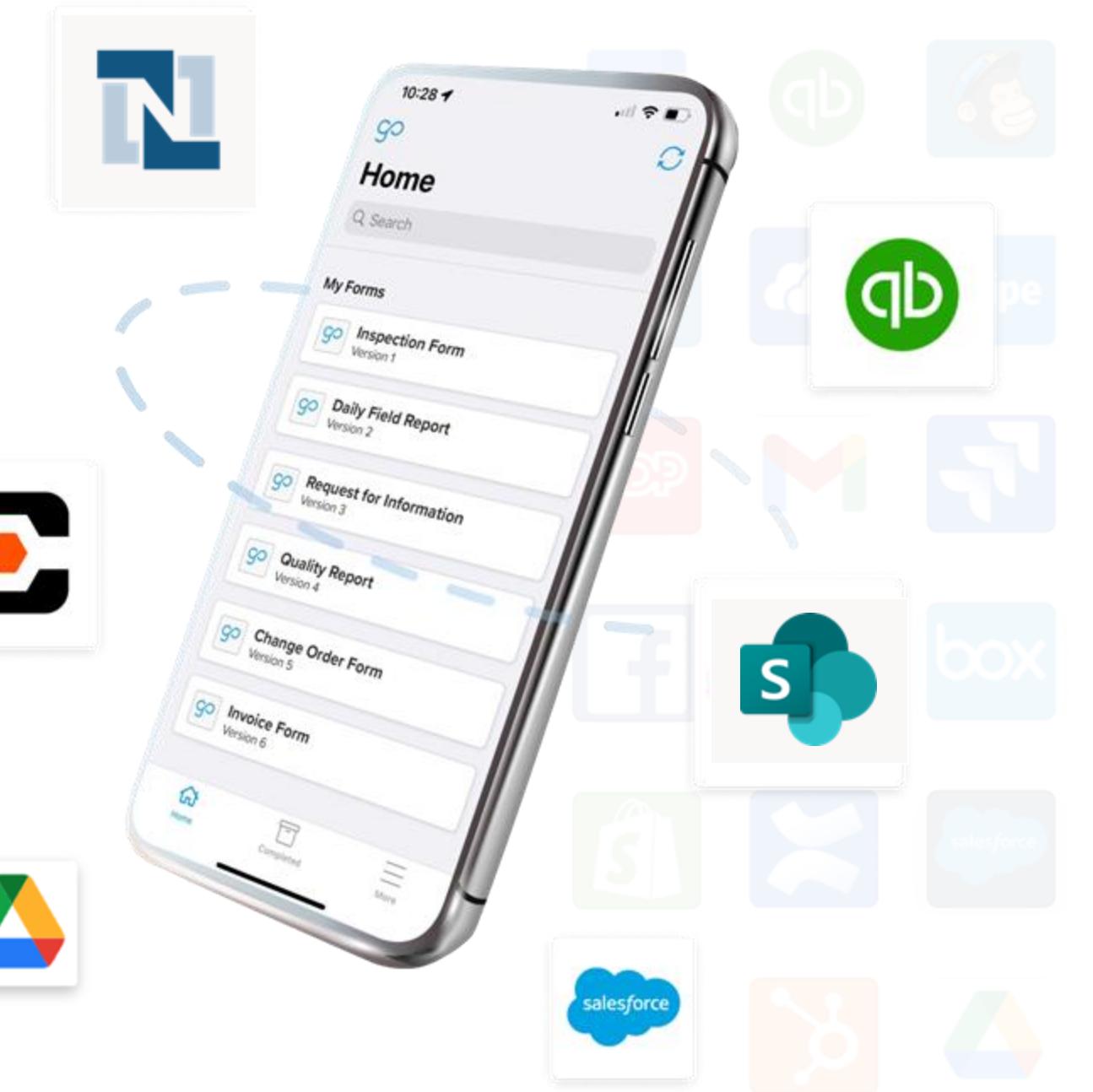
Save time by automating your day-to-day tasks, combining data from GoCanvas with tools you already use. For example, use GoCanvas to automate invoices in QuickBooks or sort information and files in Google Drive, Box, or Dropbox.

Integrations

Possibilities

What Integrations can cover:

- Cloud storage and databases
- Accounting systems to process payroll
- Finance systems to process billing
- CRM systems to access customer data
- Project Management Software
- Other similar types of cloud-based systems



Key Features:

 Integration with Popular Tools

 Dispatch

 Automate Invoices

 Automate Tasks

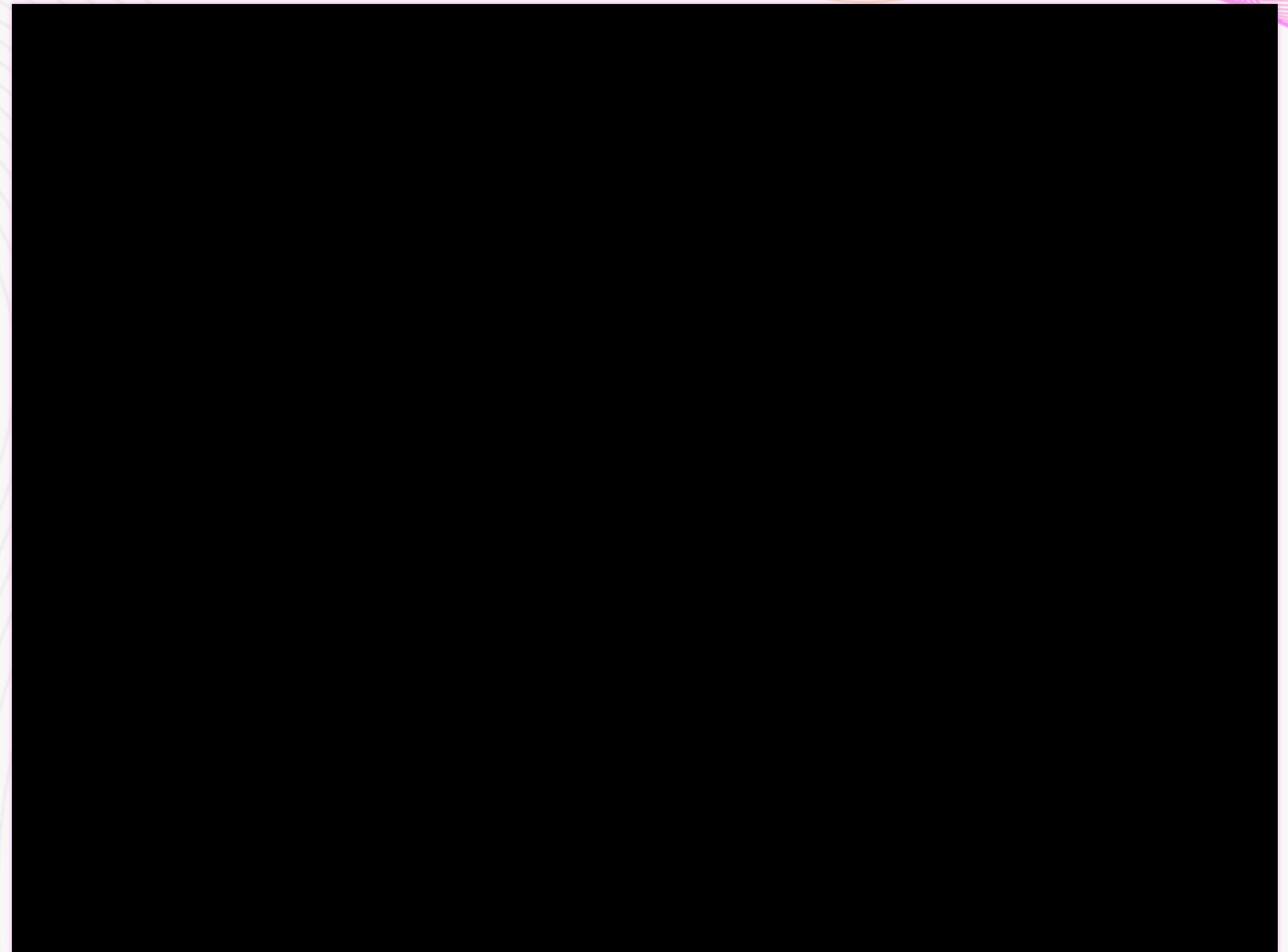
 Automate Reports

 Push Notifications

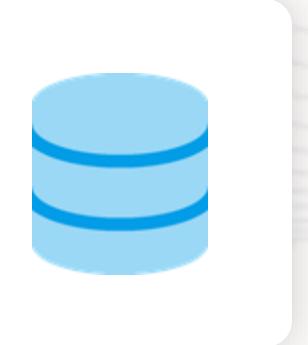
 Sort Information and Files (Google Drive, Box, Drop Box)

Video - QuickBooks

“



Integrations: Benefits



Back End

What Back End Data can do:

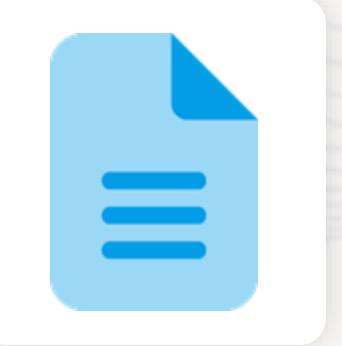
- Improve collaboration and facilitate omnichannel customer experiences
- Significantly save time by reducing the need for manual data gathering and analysis
- Increase productivity by reducing errors and rework
- Deliver more valuable data insights and business intelligence

PROCORE

- Upload Daily Field Report data and reports to a Job
- Import Customers and Locations lists into GoCanvas
- Create new projects
- And much more....



Integrations: Benefits



Reporting

1. Driving Productivity

Organization uses both QuickBooks and Salesforce. Sales Reps need data from both systems for their work. Wouldn't it be better if your Rep can get access to all the data in Salesforce? This will help him save time spent on toggling between the two systems. Also, it will help him do his job at a higher speed.

1. Enabling Automation

Be automated so that your workforce can focus on tasks that need specialized skills and human intelligence. Salesforce integration enables the automation of many tasks.

3. Modernizing data infrastructure

Salesforce Integration will help you modernize your data infrastructure and make the most of your customer and business data.

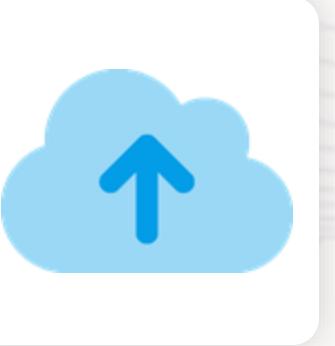
4. 360-degree customer view

An integrated system with data collected from multiple sources will help you get a complete view of customers' needs, pain points, and behavior.

5. Reliable decision-making

Leadership requires access to all data to contextualize a scenario, understand the benefits and risks and then make a decision. Sales integration with other systems like ERP, Finance Apps, and other platforms will give them a complete view to help them make better decisions.

Integrations: Benefits



Storage

- **Document Management**

- Store & Share Files
- Manage Permissions

- **Content Management**

- Build Internal Websites
- Track Changes

- **Knowledge Management**

- Store Best Practices
- Run Polls & Surveys

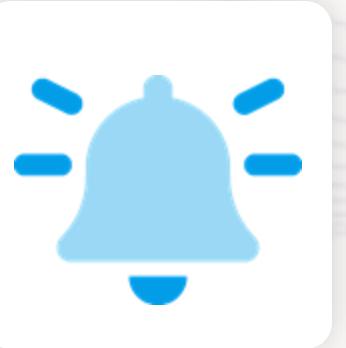
- **Project Management**

- Share Project Information
- Track weekly tasks & activities using planner
- Collaborate via wiki

SHAREPOINT
All of your
documents in
one spot



Integrations: Benefits



Notification

1. Calendar Integration

Keep all of your meetings and appointments organized by pairing your calendar app with your Slack account. This seamless setup will make your day run without a hitch and keep you ahead of schedule. Calendar integration apps include Google Calendar, Outlook Calendar, and Calendar Bot.

1. Communication Integration

It is the ability to streamline voice, video chat, and written communications with voice and chat app integrations.

3. Productivity Integrations

Trying to find a way to stay focused? If you're in need of extra productivity, it is a good idea to integrate your productivity software into your Slack workspace to make sure that you're able to stay focused.

4. CRM Integrations

Don't bother leaving Slack if you wish to access your latest opportunity. Thanks to these CRM integrations, customer information is just a few clicks away. The Salesforce app is an example of CRM Integration.

5. Storage and Administrative Integrations

Easily eliminate bothersome administrative tasks by connecting integrations to your workspace that simplify your life. Some apps are Dropbox, Box, HelloSign.

Integrations

Options



Professionally Built by GoCanvas

What It Is

Let us do the heavy lifting. Use our team and professional services to connect GoCanvas to the tools you already use.

Who It's For

Businesses with limited technology support or who need to get integrations up-and-running quickly.

Developer Commitment

Low



Point & Click Integration Builder

What It Is

A little upfront work delivers an outsized impact. Use our point & click integration builder to trigger standard actions between GoCanvas and

Who It's For

Businesses wanting control of their integrations using over 1,200 pre-built connectors.

Developer Commitment

Medium



GoCanvas API

What It Is

We're giving you the keys to the car. Use the GoCanvas API to build custom integrations that push your data into third party systems.

Who It's For

Businesses that have a development team and require custom integrations tailored to their unique needs.

Developer Commitment

High

We integrate with over 1000 business tools, including:



GoCanvas API

What the API can do:

- ✓ Give you full control of your data integrations
- ✓ Eliminate redundancy and ensure data integrity by enabling custom workflows with real-time data pushes, pulls and updates
- ✓ Facilitate seamless data exchange with robust, secure REST API capabilities

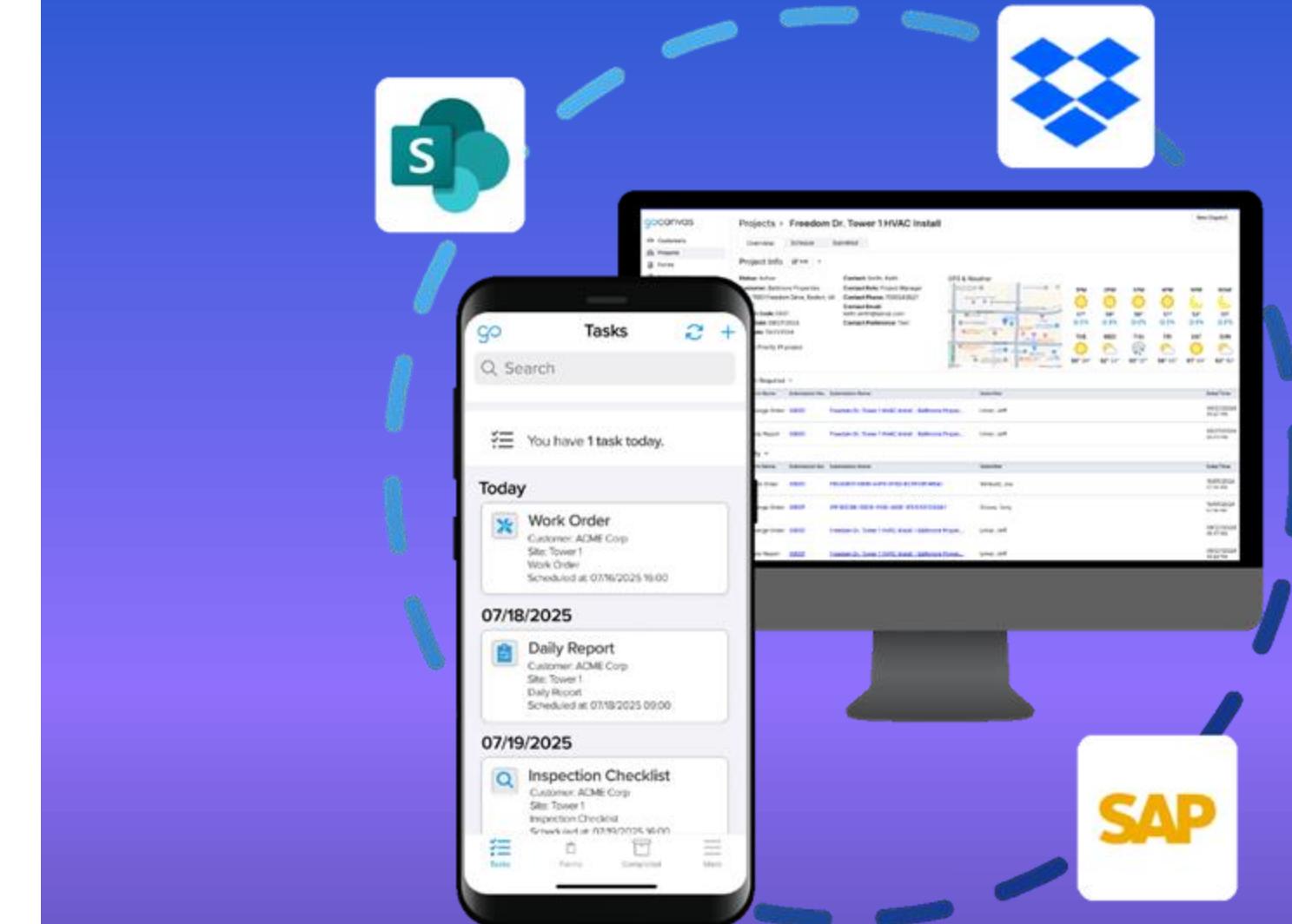
Key Features:



Integrates with any system that supports an API endpoint



Developer-friendly documentation and samples

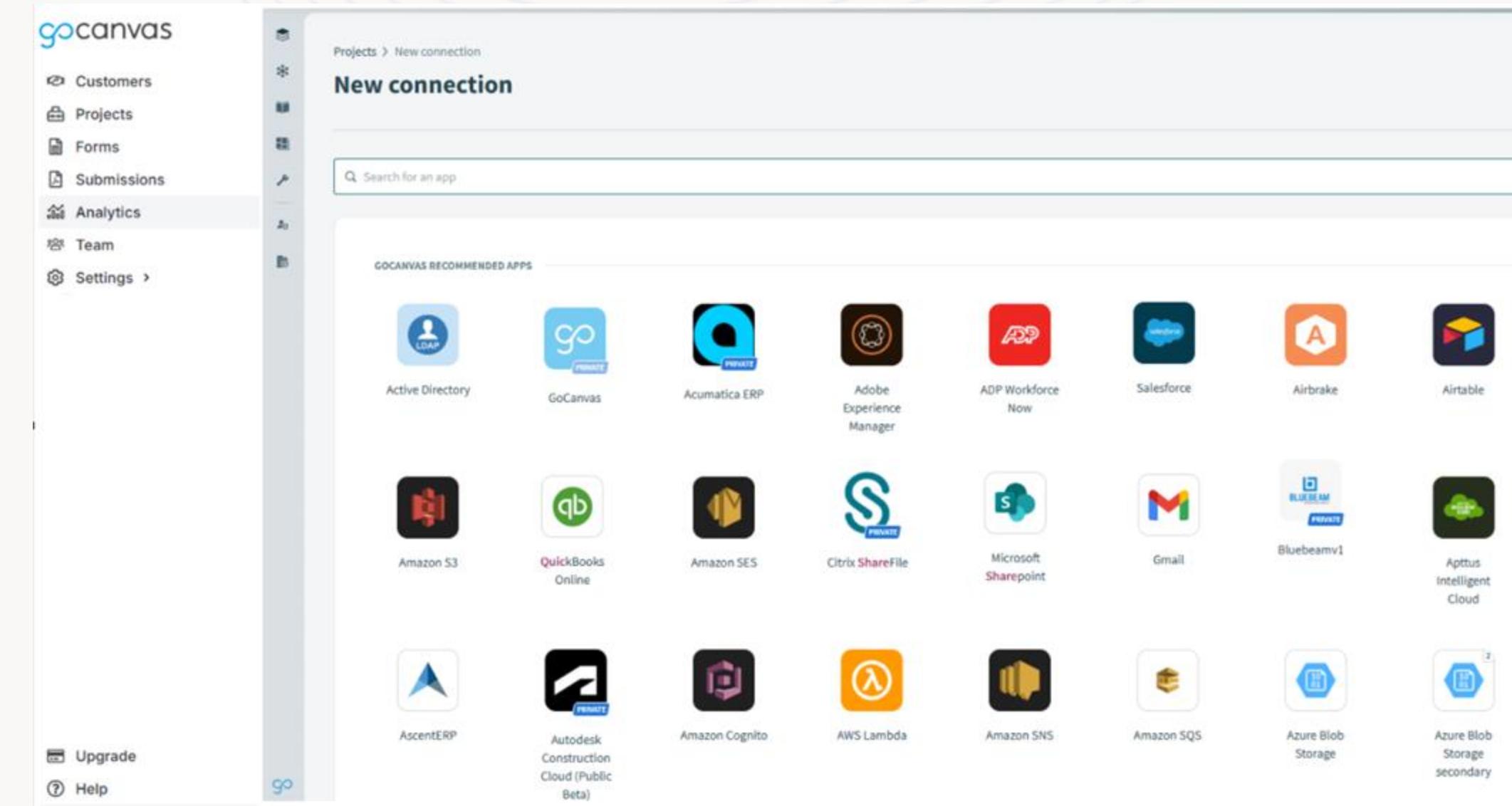


GoCanvas API supports scalable custom integrations tailored to your unique business needs. It unlocks your data to be used across your systems for an efficient and informed workforce.

Integrations

Workato enterprise level IPaaS

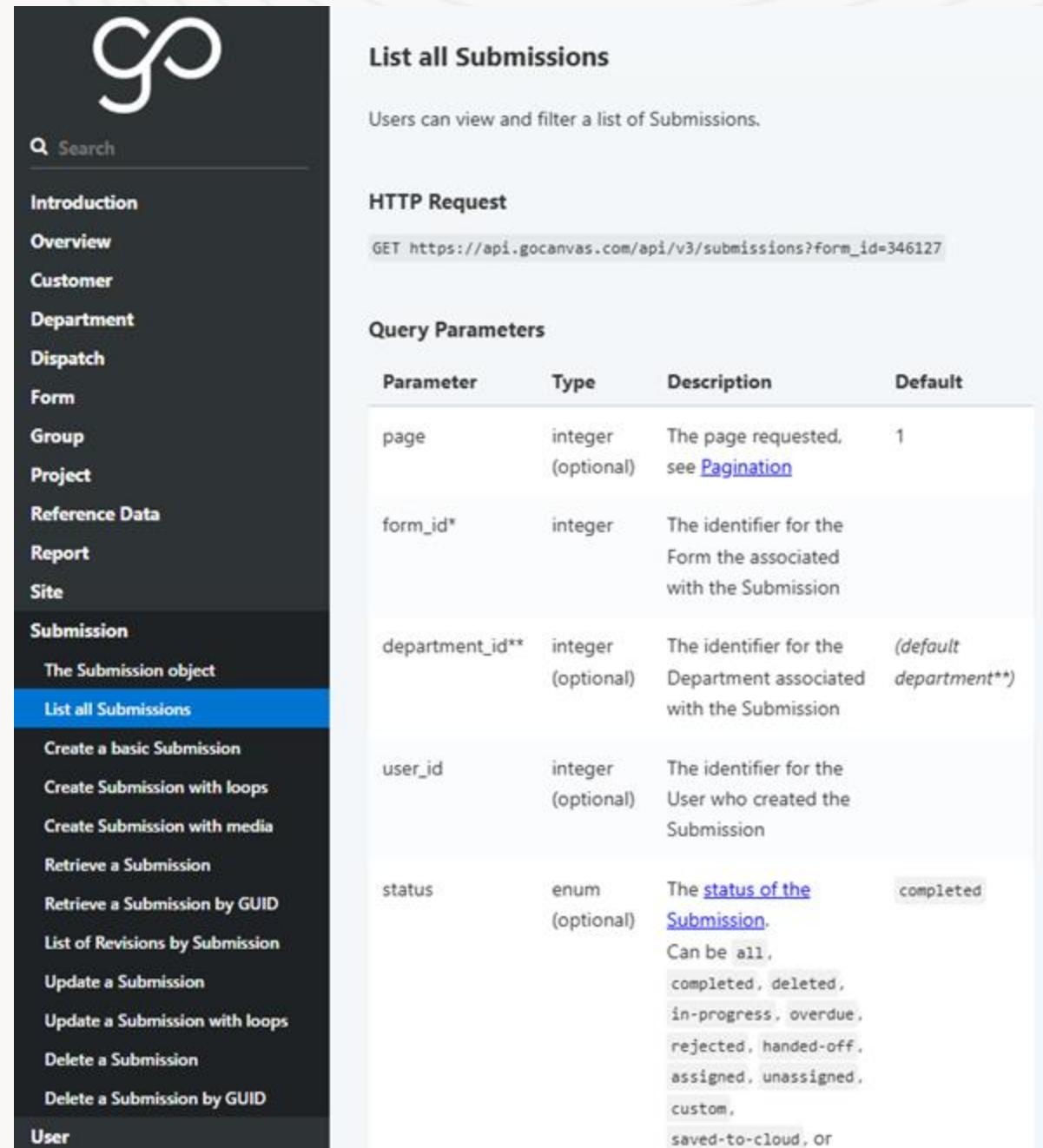
- Embedded directly into the GoCanvas desktop experience.
- No-Code/Low-Code Platform: Enables users across teams to build, customize, and troubleshoot integrations without heavy technical expertise, accelerating implementation.
- 1,200 pre-built connectors



Integrations: API v3

Free to use for all accounts

- Developed in 2025
 - Expanded capabilities compared to v2
 - Developed with years of direct feedback from customers and the GoCanvas services team
- Users can manage Forms, create Submissions, retrieve Reports, and much more
 - Create/edit dispatches
 - Reference data upload/update
 - Manage customer and projects lists
- Full access to all GC form submission data
 - Individual submission data
 - Bulk data reports
- User access
 - Roles
 - Permissions
 - Form Assignments



List all Submissions

Users can view and filter a list of Submissions.

HTTP Request

```
GET https://api.gocanvas.com/api/v3/submissions?form_id=346127
```

Query Parameters

Parameter	Type	Description	Default
page	integer (optional)	The page requested, see Pagination	1
form_id*	integer	The identifier for the Form the associated with the Submission	
department_id**	integer (optional)	The identifier for the Department associated with the Submission	(default department**)
user_id	integer (optional)	The identifier for the User who created the Submission	
status	enum (optional)	The status of the Submission . Can be all, completed, deleted, in-progress, overdue, rejected, handed-off, assigned, unassigned, custom, saved-to-cloud, or	completed

```
curl -u api.user@example.com:supersecretpassword \
-H "Content-Type: application/json" \
-X GET \
https://api.gocanvas.com/api/v3/submissions?form_id=346127
```

RESPONSE

```
[{"id": 6625009, "type": "submission", "client_guid": "049c1544-1ab5-41a1-a249-b8811cfa335c", "form_id": 346127, "submission_number": "00003", "submission_name": null, "created_at": "2023-10-13T14:10:34Z", "revision": true, "department_id": 13521, "user_id": 20079, "status": "completed"}, {"id": 6624756, "type": "submission", "client_guid": "19b24c19-2247-4e05-92b1-0fd7f7510336", "form_id": 346127, "submission_number": "00002", "submission_name": null, "created_at": "2023-10-09T18:00:17Z", "revision": false, "department_id": 13521, "user_id": 20079, "status": "completed"}, {"id": 6623946, "type": "submission", "client_guid": "d97c09ed-ce49-4a76-bcad-01508d4b6576", "form_id": 346127, "submission_number": "00001", "submission_name": null, "created_at": "2023-10-09T18:00:17Z", "revision": false, "department_id": 13521, "user_id": 20079, "status": "completed"}]
```

GoCanvas and Bluebeam

A close partnership: development underway

GoCanvas Embedded



- Dispatch directly to GoCanvas from your Studio session

Workato Connector



- Solves custom use cases
- Start studio session based on GoCanvas submission data
- Add GoCanvas PDF to Studio Session

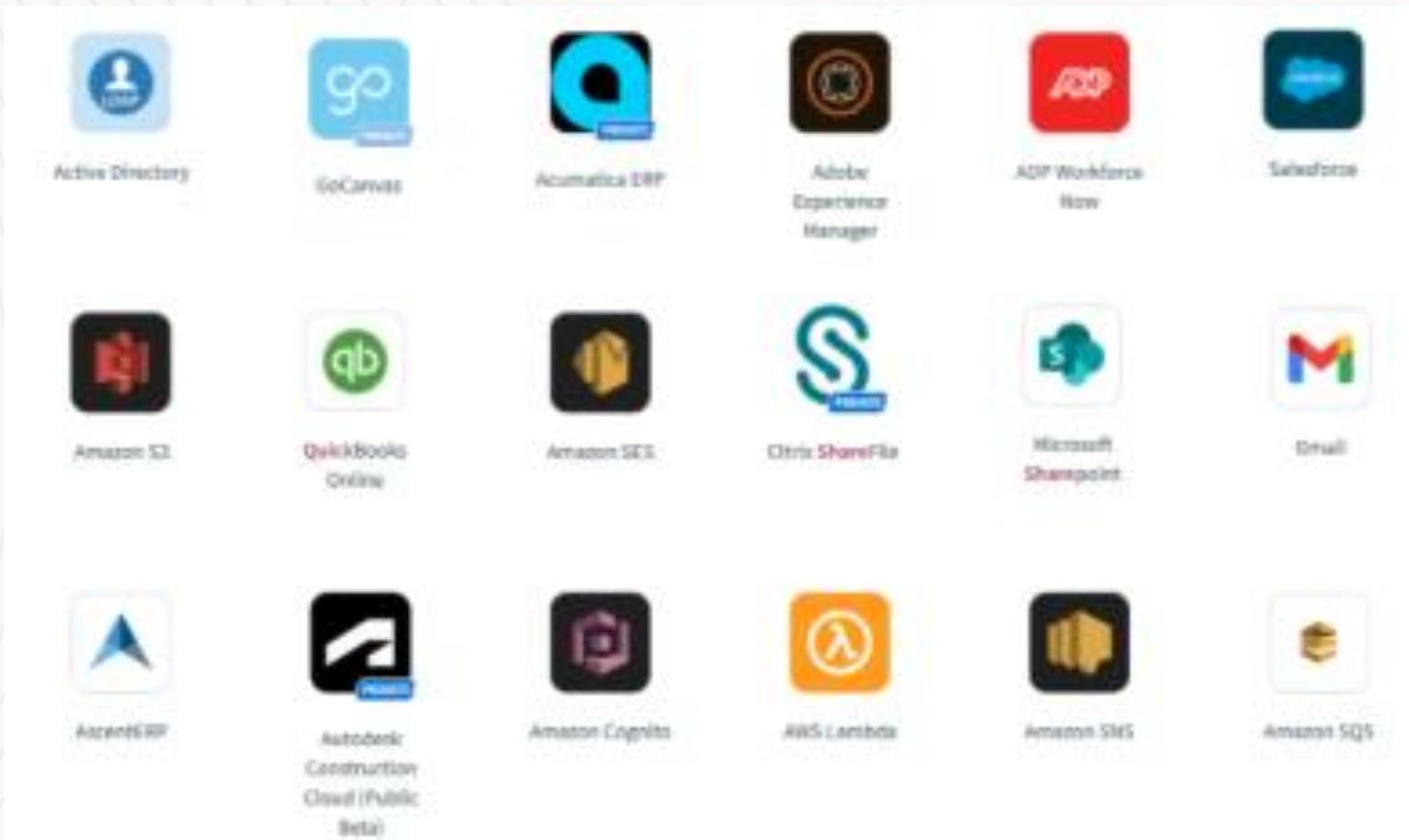
Workato Connector



- Solves custom use cases
- Bluebeam Session details readily available in forms
- Collect data to finalize Studio session when criteria are met

Integrations

What will you connect?



How will it impact your business:

Faster Billing

Integrate field data for quick, accurate invoicing.

Improve Data Consistency

Sync data across systems

Reduce Costs

Eliminate redundancies and optimize resources

Questions

Thank You

Scan the QR code to request a GoCanvas demo

