



SALESFORCE

EXTENDED PROFILE



OVERVIEW

Salesforce is a CRM cloud-based solution that caters to companies of all sizes – it is a single platform intended to manage all aspects of sales, service, marketing, and analytics, through area-specific “Clouds” in order to meet specific business needs.

With separate “clouds” for each arm of their CRM, Salesforce provides solutions suited for companies who wish to engage in different aspects of the modern consumer space while maintaining the ability to segregate operations between teams, avoiding over-complication while still allowing for cross-communication. Salesforce offers different services through separate price plans, so businesses only looking for partial CRM functionality can adjust their service level and costs to fit their needs.

Salesforce’s Community Cloud enables customer self-service and effective management through an online community, giving customers the freedom to access information and advice concerning their business with the company. Through this, they aim to reduce the need for dedicated customer service and improve the overall experience.

Through Sales Cloud, Salesforce aims to make selling easier and more effective through predictive lead scoring which recommends the best action to boost revenue and productivity.

A fully cloud-based system, Salesforce is accessible through any device, including iOS and Android, with customizable pricing on a usage basis.

FEATURE OVERVIEW



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Salesforce
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✓
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✓
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✓
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓

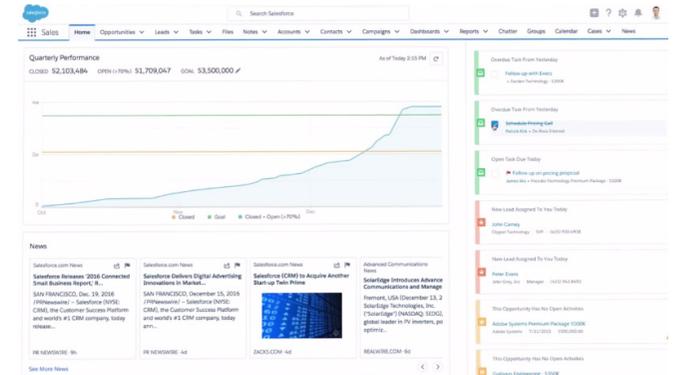
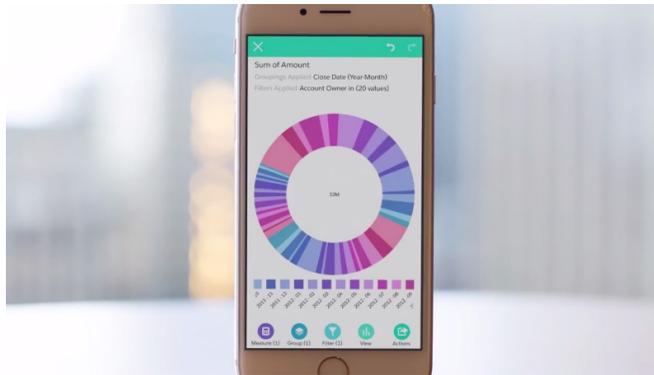
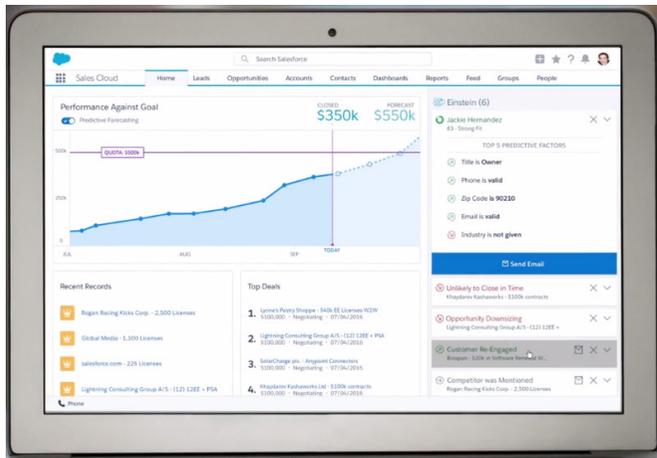
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✓
QUOTATION HANDLING	✓
TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✓
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✓

ANDROID APP	✓
NATIVE WEB APP	✗
HOSTING METHOD	
CLOUD	✓
ON-PREMISE	✗
FURTHER INFORMATION	
PRICING	\$25/user/month* (billed annually). Up to 5 users



SOFTWARE SCREENSHOTS

The screenshot displays the Salesforce CRM interface for an Opportunity record. The top navigation bar includes "Sales Cloud" and various tabs like Home, Leads, Opportunities, Accounts, Contacts, Dashboards, Reports, Feed, Groups, and People. The main header shows the Opportunity name "Biospan - \$20k in Software Renewal W2W" and a search bar. Below the header, key details are listed: Account (Biospan Inc.), Close Date (Feb 28, 2016), Amount (\$20,000), and Opportunity Owner (Simon Fraser). A progress bar indicates the current stage is "Negotiation", with previous stages marked as complete. The interface is divided into sections: "ACTIVITY" with a form for logging calls, tasks, events, or emails; "Next Steps" with a calendar entry for a "New Product Demo" on Oct 1, 2016; and "Past Activity" with an email exchange from Jackie Hernandez to Simon Fraser. On the right, an "Einstein" AI panel provides insights, such as "Customer is Re-Engaged" and "Trending Up: Likely to Close", along with a prediction of why the deal is more likely to be won.



CONTACT Ms. Lauren Smith

Title: SVS, Technology | Account Name: United Partners | Phone: (415) 863-9303 | Email: lsmith@up.com

RELATED DETAILS

Name	Ms. Lauren Smith	Contact Owner	Cindy Central
Title	SVS, Technology	Email	lsmith@up.com
Department	IT	Phone	(415) 863-9303
Account Name	United Partners	Mobile	(415) 635-1212

Additional Information

Reports To: Bob Hodges

Lead Source

ACTIVITY CHATTER

Next Steps

- Prepare for Discovery Meeting: Research their products, prepare for Related To: UP - Add-On Business
- Prepare for Discovery Meeting: Research their products, prepare for