

Account Management

Data sheet



Key Features:

- Customizable Account Fields, Views, Reports and Dashboards
- Customizable Workflow, including Real-time Alerts
- Self-service Account creation
- Mass E-mail tools
- Simplified Importing and Exporting
- Mass create, delete, reassign Accounts
- Zip Code Proximity Search
- Easily share Accounts with team members
- Associate Accounts with related records
- Outlook Integration is included with all CRM Editions

Salesboom.com simplifies Account Management strategies by leveraging CRM best practices and our years of experience working with thousands of organizations. Our online CRM Software is equipped with streamlined Account Management functionality including Web Capture Account Creation, Mass Account Management tools as well as Zip Code Proximity Search.

Highly Customizable

Salesboom.com's Account Management Solutions are easily customizable with AJAX drag and drop functionality allowing even non-technical users to create a personalized look and feel to fit any account management plan. Our Account Management system is fully integrated with our full line of CRM/SFA solutions including customizable workflow rules. Using customizable workflow rules your organization can benefit from real time alerts including notification of account creation or edit as well as big deal or at risk alerts.

Simplified Account Management

With customizable views, reports and dashboards your organization will always have the most important information directly at your finger tips. This is combined with our related records section displayed within a view of your accounts providing you with a quick access point to all related information to any particular account. If your organization works in groups Salesboom.com makes it easy for team members to stay on track with secure sharing which allows users to share complete accounts or particular information with custom security settings.

Salesboom.com custom workflow rules automate key Account Management processes and include the ability to automatically route particular accounts to certain representatives based on location. Our ZIP Code Proximity tools also ease reporting by allowing you to create reports and account lists based on a radius of a given location.

Securely Accessible Anywhere

With Salesboom.com you have full access to your account information from any computer with an internet connection. Using the Software as a Service model Salesboom.com is accessed via a web browser and an internet connection providing you with secure access 24/7/365.

Visit our Web site at:
www.salesboom.com
Or for more details call us
today at 1-800-CRM-SALE.