

Promote Your CRM

Operational Workflows

Add any-interval recurring activities for tasks
Assign activities out to team for completion

Document Approvals

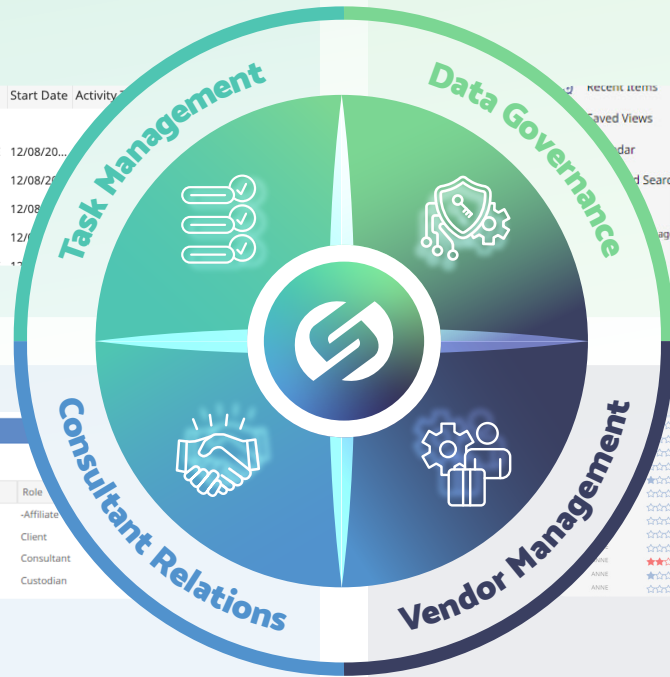
Add any document to the CRM in draft form
Configure fields to monitor approval processes

Keep Your Data Clean

Identify Stale Records
Catch Accounts without Designated Contacts
Flag Unpaid Invoices
Capture Bouncing Emails
and much more!

Status	Co...	Entity	Att	Rep	Start Date	Activity
Completed?: false (12)						
★	<input type="checkbox"/>	Clarke, Tim ...		ANNE	12/08/20...	
★	<input type="checkbox"/>	Clarke, Tim ...		CHIP	12/08/20...	
★	<input type="checkbox"/>	Clarke, Tim ...		CHIP	12/08/20...	
★	<input type="checkbox"/>	Clarke, Tim ...		JOHN	12/08/20...	
★	<input type="checkbox"/>	Clarke, Tim ...		ANNE	12/08/20...	

recent items	recent items
Security	Form
Data Dictionary	Surf
Data Import Tools	Recor
Satuit Data Exchange	Con
Reports & Templates	Form
Workflow	(De



Linked Relationships		
Entity	City	Role
Breton Oil & Gas PLC	London	-Affiliate
Bullard Law	Portland	Client
Stingy Consulting Corp.	New York	Consultant
Water Mellon Trust	Boston	Custodian

MAP RESULTS
<ul style="list-style-type: none"> Aetna Inc. Abold USA, Inc. Amherst College Analogy Devices, Inc. Cambridge Associates Electrical Workers, 281W.L. Elevator Constructors, Inc. Hotel Commonwealth Iron Workers, District Cou Kerry Albert & Co Kraft Family Office Lawrence Runkle Mercer Consulting, Inc.

Sentiment Analysis

Track opinions by consultant or product
View History of Opportunity Involvement
AUM Tracking

Communications

Capture Institutional Knowledge
Understand Recent / Upcoming Interactions

Key Vendor Info

Contact Information

Contract Info

Attach Agreements & Check Status

Support & Communications

Track Support Requests

Proactive Renewals

Auto-Notifications & Task Assignments