

Riptide Reference Tracking

Product Data Sheet

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Reference Tracking is a native Salesforce application that allows your organization to efficiently track and manage all customers who are willing to serve as a reference for your products or services. Because Reference Tracking is a native application all the information is presented in screens that will be familiar and intuitive for your users.

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Description

Riptide Reference Tracking gives your organization an edge in recording and tracking all customers who are references, associated products with the references, associated contacts with both products and references, and associated references with sales opportunities. It is also possible to track standard Salesforce activities such as emails, meetings, phone calls, and more, with References, Reference Contacts, and Opportunity References so you can monitor how often a particular reference is being used.

Reference Tracking can be customized in the same manner as any of the native Salesforce components with the addition of custom fields to make the tracking of information even easier.

Highlights

References	Allows you to identify an account as a reference
Reference Contacts	Allows you to associate specific contacts with a reference
Reference Products	Allows you to associate specific products with a reference
Opportunity References	Allows you to identify references for opportunities

Features & Benefits

Increase Sales — Studies have shown that consistently including customer references as part of your organization’s sales process will result in better sales, and Reference Tracker puts this information at the fingertips of your sales team.

Improve Sales Effectiveness — Giving your sales team immediate access to customer reference information allows them to identify the right reference for each opportunity, enabling them to close more deals.

Know Your Best Customers — Tracking all reference activity ensures that your organization can identify your best customers and take steps to keep them happy—such as preventing overuse as a reference.

Key Reports

Reference Contact List — Quickly and easily get a list of all active and inactive reference accounts and associated reference contacts.

References by Product — View an entire list of references grouped by product, and easily locate references for specific products.

Opportunity References — Sales management and marketing teams can identify all opportunities where a reference was used, which can help measure the effectiveness of using references on deals.

Requirements

The Riptide Reference Tracking application will work with any of the following editions of Salesforce:

- ▶ Professional
- ▶ Enterprise
- ▶ Unlimited

Specifications

Type	Native
Publisher	Riptide
Website	www.RiptideCloud.com/products/referencetracking



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