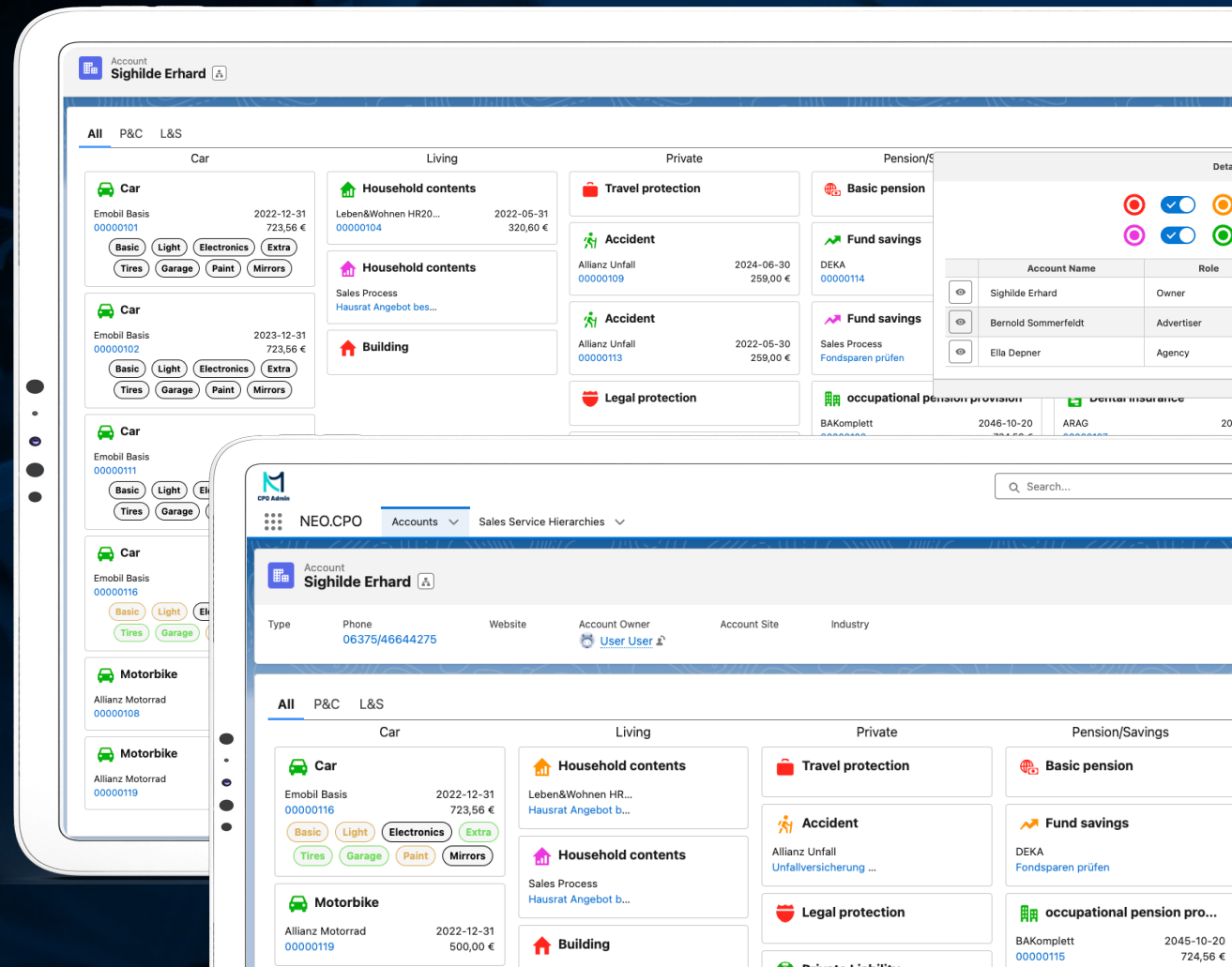




NEO.CPO

Optimize your Customer 360 view with a unique customer product portfolio overview

- **Best in class visualization** of customer product portfolio.
- Effortlessly track sold products across all lines of business within seconds.
- **Get a comprehensive overview** of key elements like opportunities or contracts to quickly identify sales potential presented in a stunning view.
- **Easy and fast navigation** to all associated objects without searching list views.
- 100% customizable to your needs.





NEO.CPO

Customer Portfolio Overview – Salesforce UI Component



TOP FEATURES

- Get a visual overview of all essential elements, including customer policies and competitor contracts, particularly in an insurance scenario
- Experience a three-level structured layout of sales and product hierarchy for enhanced organization and accessibility.
- Toggle between compact and detailed layouts, adjusting the displayed information according to your preferences.
- Select associated accounts and enhance the view with their relevant elements.
- Integrate individual business logic or use pre-configured methods to start immediately.
- Fast & easy implementation in minutes.

The screenshot displays the NEO.CPO interface within a Salesforce environment. The top navigation bar includes the NEO.CPO logo, a search bar, and tabs for 'Accounts' and 'Sales Service Hierarchies'. The main content area is titled 'Account Sighilde Erhard' and shows various account details and product categories.

Account Details:

- Type: [Blank]
- Phone: 06375/46644275
- Website: [Blank]
- Account Owner: User User
- Account Site: [Blank]
- Industry: [Blank]

Product Categories:

- Car:** Emobil Basis (2022-12-31, 723,56 €), Motorbike (Allianz Motorrad, 2022-12-31, 500,00 €)
- Living:** Household contents (Leben&Wohnen HR..., Hausrat Angebot b...), Sales Process (Hausrat Angebot b...), Building
- Private Liability:** Privatschutz H 2020 (2023-11-30, 167,85 €), Riester insu (Riester Fondsparen, 00000117)

Account Name and Role Table:

Account Name	Role
Sighilde Erhard	Owner
Bernold Sommerfeldt	Advertiser
Ella Depner	Agency



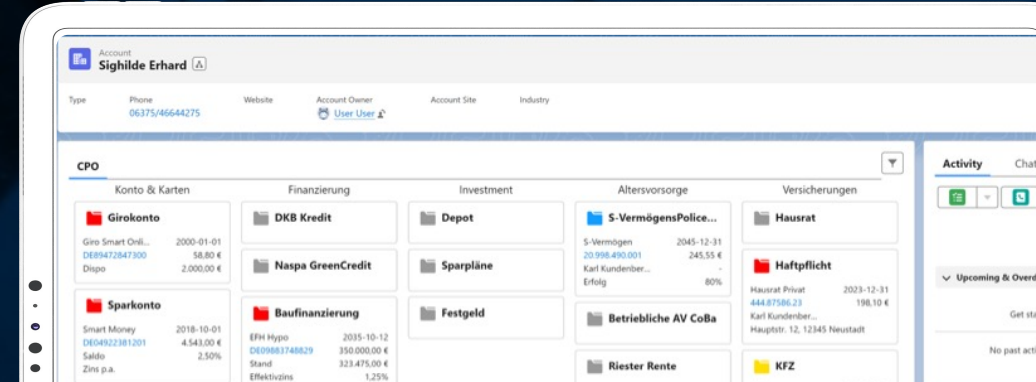
NEO.CPO

Customer Portfolio Overview – Salesforce UI Component



FAST & EASY IMPLEMENTATION

- Enhance account overview page with NEO.CPO UI Component.
- Use pre-defined business logic to select opportunities and contracts.
- Customize your own unique logic for contract, product, or other data processing.
- Flexible presentation of object details with both standard or custom fields.
- Set up your own sales- and product hierarchy.
- Personalize color codes for each supported object to enhance user experience and understanding.



 **AppExchange** Home Solutions by Type Product Collections Industry Collections Consultants Learn Latest Collections



NEO.CPO - Customer Portfolio Overview

By NEOMATIC AG

Optimize your customer 360 view with a unique contract and product overview

 **Salesforce App**

No Ratings

Requires
Sales Cloud

Compatible With
Sales Cloud Service Cloud
Financial Services Cloud

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Get It Now

NEO.CPO is a Salesforce UI component that optimizes a customer 360 view. It visualises a contract and product details. NEO.CPO is made for insurance industries but it can help any company with complex product portfolios.

NEOMATIC

Your partner for CRM and Sales Performance Management
New Solutions for measurably better Sales Performance



Customer Experience
with **SAP**



Commission
Management
with **SAP**



Customer 360
with **Salesforce**

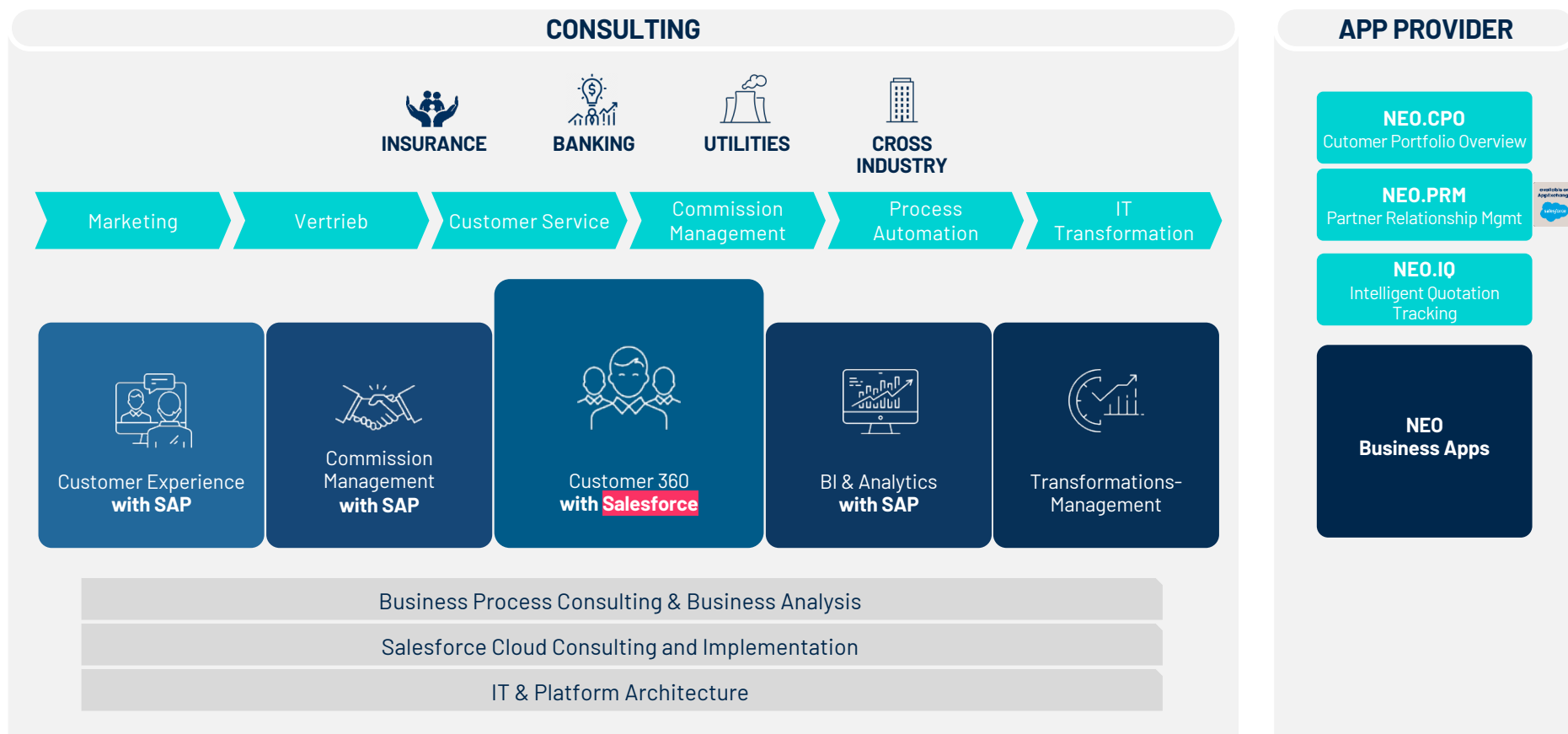


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