

Apsona: Complete Data Management Solutions for Any Salesforce Org

Apsona Bundles

Apsona enhances your Salesforce experience with scalable, purpose-built tools for reporting, document generation, automation, and data management. If you're using Sales Cloud, Nonprofit Cloud, Education Cloud or working with custom objects and advanced data models, Apsona helps teams work faster, cleaner, and more confidently. Our Essentials, Advanced, and Premium bundles are designed to align with your organization's size, complexity, and growth.

All bundles include Apsona's core suite of tools:

Apsona for Salesforce, Document & Email Merge, Multi-Step Reporting, Charts, Dashboards, Dedupe & Match, Grids, Scheduler (included in Advanced + Premium), and Specialized Licenses (Button-Only & View-Only).



Essentials

- For foundational teams (3–9 licenses)
- Built for day-to-day data operations across objects
- Generate reports, documents, and emails directly in Salesforce
- Maintain data quality with bulk updates and deduplication
- License Bonus: Get up to 9 free Specialized Licenses (1:1 ratio)



Advanced

- For growing teams (10–49 licenses)
- Includes Essentials features
- Automate routine tasks with Scheduler (reporting + doc merge)
- Access Quick Start Templates and live public workshops
- License Offer: 50% off Specialized Licenses



Premium

- For enterprise teams (50+ licenses)
- Includes Advanced + Essentials
- High-volume merge capabilities for enterprise-scale output
- Integrate with custom objects for complex data needs
- License Offer: 66% off Specialized Licenses

Choose the solution that fits you best:



The Apsona Advantage: Value That Scales With You

- **Faster Time to Value:** Start strong with pre-built implementation templates that minimize setup time and maximize early wins.
- **Sustained Success:** Drive adoption and skills growth with monthly live enablement workshops, ensuring users evolve with the platform.

"We had a very specific and complex set of requirements for tax letters. The Apsona Support Team was able to meet the challenge and worked tirelessly to meet all the requirements." - D.M



Reach out to us at www.apsona.com/pricing or sales@apsona.com



apsona 
Simple. Reliable. Effective.

Choosing the Right Apsona Licenses for Your Team

Standard vs. Specialized Licenses: What You Need to Know

Apsona licenses are designed to align with how your team works. From full-feature access for data power users to streamlined viewing and action tools for broader teams, our license options help you scale smarter without compromising functionality



Standard Licenses

Best for power users, admins, and data managers. Grants full access to Apsona's complete feature set for hands-on data work.

Key Capabilities:

- Multi-step & cross-object reporting
- Document and email merge
- Find, match, and merge duplicates
- Data import and batch entry
- Create and manage charts and dashboards
- Full access to grid views, filters, scheduler, and more



Specialized Licenses

Perfect for front-line users, reviewers, or executives. Streamlined access for viewing, interacting, and executing button-based tasks—without edit access.

Key Capabilities:

- View & export prebuilt multi-object reports
- Use portable grids for simplified data review
- Execute button-based actions (e.g., merge, email)
- Embed read-only reports on record pages



License Strategy Tip

- Maximize value by mixing license types across your org. Give advanced access to your data team while equipping broader users with Specialized Licenses to view reports, run documents, and take button actions—without overpaying for unused functionality.

Choose the license that fits your team:

Why It Matters

Right-sizing your licenses means:

- Faster onboarding for users with focused roles
- Better ROI with tailored access
- Increased adoption and usability across teams
- Scalable access for orgs with growing or complex Salesforce environments



Reach out to us at www.apsona.com/pricing or sales@apsona.com

