Why Ascendix Search?

Ascendix Search simplifies complex Salesforce searches turning any user into an advanced search specialist. Perform single/multi-criteria searches without building list views, save your searches, bulk edit records, export lists to Excel, filter and refine searches by maps & charts, and more. Easy-to-use, intuitive user experience where everything is done with clicks, not code. Zero training time. Setup and start using!

@scendix
S E A R C H

Marketers:

Get The Most Out of The Data

- Build precise marketing lists in a few clicks.

- Save and reuse your lists. No need to create new lists every time.

- Define the optimal event location by displaying your leads/clients on a map.

- Identify top territories to target and reallocate your budget.

- Segment your lists by any criteria including information from the related objects! E.g., you can filter contacts that work for accounts with $15M annual revenues or more.

- Build your lists using size, industries, location, roles, sales rep, user behavior or anything else from your Salesforce.

- Perform data mining and "what if" analysis on your data without the overhead of creating reports or list views.

- Keep your data clean and consistent. Mass update lead sources, log the last campaigns you had outside of Salesforce.

- Export your lists to Excel/CSV in one click to use in third-party software.

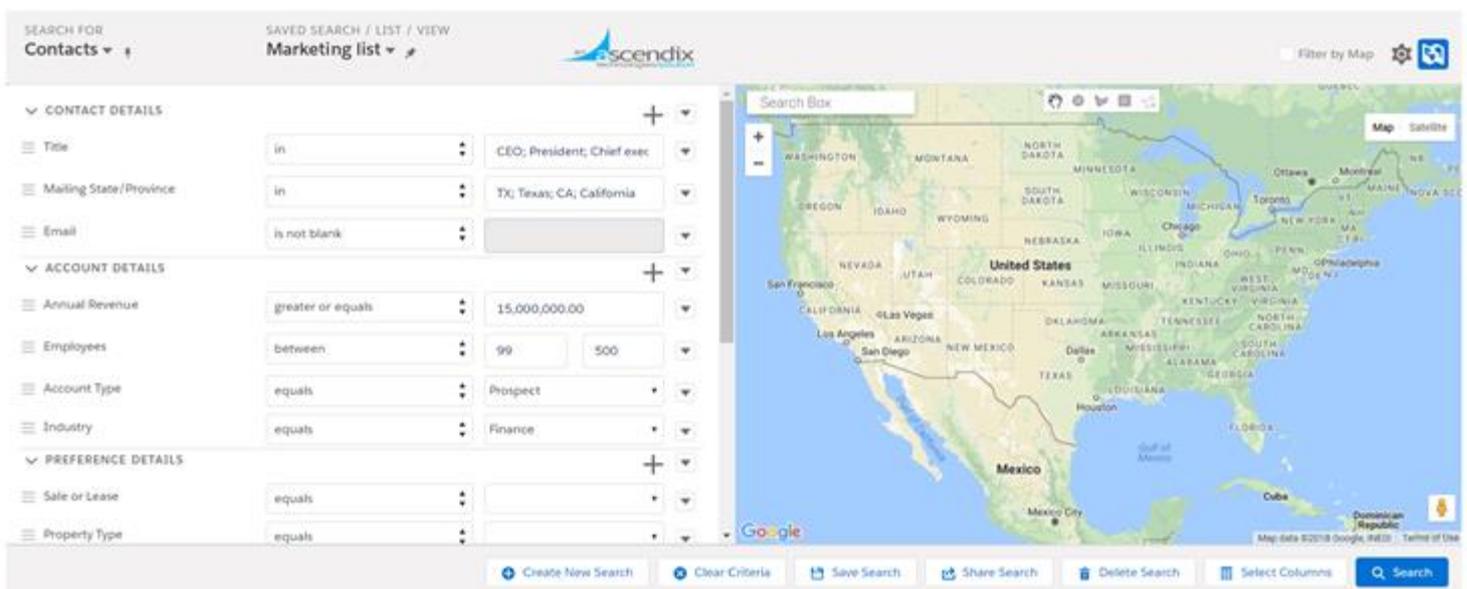You can see an example of multi-criteria, multi-object search on the image below:

Image 1. Marketing list building at Ascendix Search

Sales Reps:

Unleash Your Time For More Calls, Meetings & Deals

- Stop spending hours running new reports to find quality accounts to call.

- Prioritize key accounts and save 20%-30% of your day.

- Create and save calling lists with just a few clicks.

- Increase call activity and your pipeline.

- Create contact or account lists based on relationship to opportunities and other related objects.

- Mine the database with simple search templates that eliminate the dependency on administrative help.

- Personalize your search experience by placing fields that are frequently searched on in a template.

- Perform "WHAT IF" analysis on your data without the overhead of saving a list view. Make your data portable with the export to Excel feature.

- Speed up navigation by removing the need to toggle between the list view and detail forms.

- Automate data entry. Log a call, add notes to multiple records in bulk.

- Mass edit/update your records.

- Change territories, sales reps in bulk.

- Tag records to quickly categorize and group them using our "Ad-Hoc List" feature.

- Incorporate charts and graphs with your search results to bring insights to the data. It is an easy-to-use, intuitive app your salespeople will actually use.

Customer support:

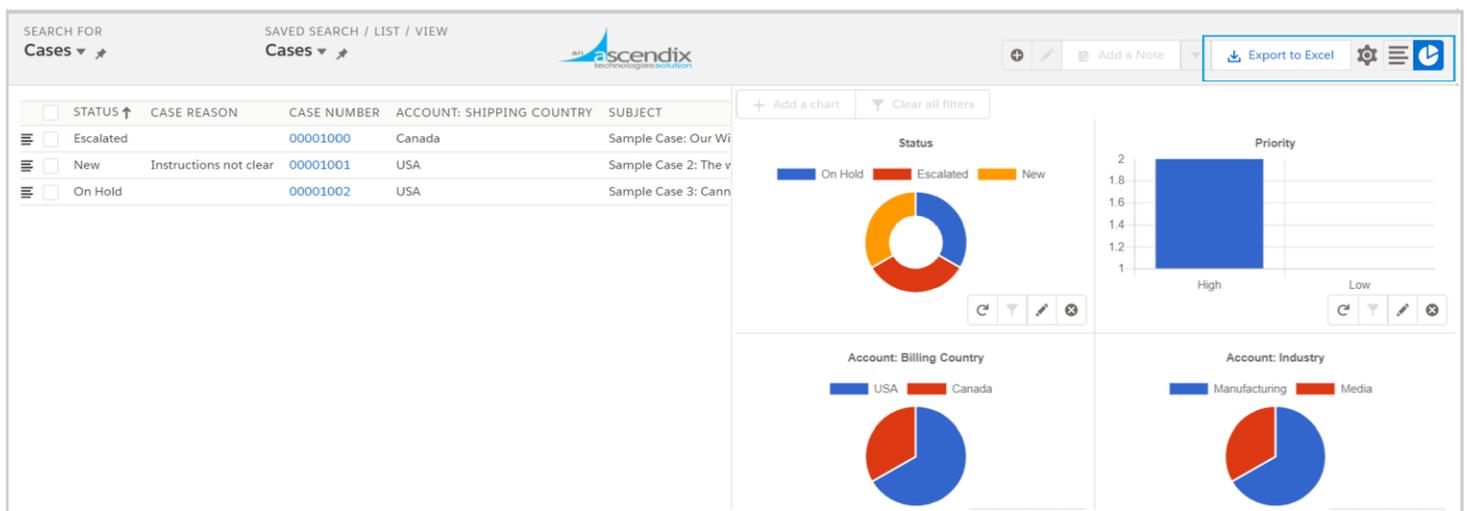### Get a 360-Degree Overview of Your Cases

- Easily produce lists of contacts and/or accounts based on case attributes.

- Create views of "at risk" clients based on case volume or SLA violations.

- Reduce dependency on reports to reveal trends and improve your customer service.

- Apply charts and graphs to list views to provide insightful and actionable information about your customers

- Use maps to assess caseload by geography.

- Quickly identify and communicate resolutions to contacts with associated issues or bugs.

- View and drill down into crucial information about your customers quickly.

Here is how we adjusted the way our customer support team sees open cases. Note, that we added the shipping country field from Accounts.

Show/Hide Insights or Export your cases to Excel in one click:

Admins:

Increase Your CRM Adoption and Usage

- Increase engagement of users by giving them an easy but advanced searching tool.

- Reduce requests by end users to build reports or list views.

- Streamline navigation with the preview panel allowing for list views and detail views to be accessed simultaneously.

- Provide users a method for tagging records as an alternative method for grouping records.

- Provide end users the ability to create and use drillable charts and graphs to more effectively interrogate their data.

- Provide end users with more immersive methods for geography-based searches using maps.

- Help your team spend most of their time doing their actual work.

- Perform "spring cleaning" on your inventory of list views that were one-time use searches.

- Streamline repetitious actions by scheduling tasks/events in bulk.

- Increase data quality with bulk edit features allowing for multiple records to be updated simultaneously.

- Deploy personalized search templates to reflect the specific interests of users.

- With Export to Excel for list views, eliminate the need to create additional reports.

User Adoption. Most users feel CRM systems are a one-way information highway and thus don't feel compelled to use it - data gets entered, but it is challenging to get any meaningful data out; at least not without some frustration and involvement from other parties.

Most companies are sitting on a goldmine of data; they just don't have the tools to mine for it. Without powerful yet easy to use data mining tools, many opportunities for target marketing and sales efforts go unrealized.

Time is Money. We've reduced the speed in which it takes to get meaningful results from simple to complex searches cutting click counts in half if not more. Complete and accurate data increases the value of CRM for all. Ascendix Search allows for the bulk editing of one or more fields at a time.

Expediting of repetitive tasks. Take care of repetitive tasks such as scheduling phone calls and tasks and taking notes for multiple records at a time.

Efficiency in building views of data. Search for data first and then determine if a list view needs to be saved.The more specific the search criteria, the more complicated the search become until now. Easy to use templates make even novices advanced search specialists.

Greater utility of list views. Allowing for end users to build views across objects expands the usefulness and insight that can be derived from views.

Remove the dependence on report writing. While there is undoubtedly a time and place for creating reports, often the report writer is being used to accommodate some of the shortcomings of the list view builder. Unfortunately, not all end users find the report writer that approachable.

Inefficiencies in geography/location-based searching. For those companies that need to see their data in maps to effective visualize their location, filtering by city, state, zip or other address oriented fields become inefficient and inflexible.

Self Sufficiency Increase. If we don't have to ask for help when using the tool, we increase the stickiness and the efficiency of usage.

Personalized experience promotes adoption and efficiency. End users can personalize their search templates to accommodate those scenarios that best reflect their use cases.

More efficiently share data with outside constituents. Using our export to Excel feature, end users no longer have to create reports to push data to Excel.

Pictures are worth a thousand words – what search refinements and data mining opportunities would reveal themselves if you had a pictorial representation of that data.

Our Customers About Ascendix Search:

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Having solid data is the muscle that makes your Salesforce CRM yield results. Adding Ascendix Search to Salesforce is the equivalent of providing your CRM a brain.

It can take the data you have curated and churn out call lists, email campaigns and follow up protocols which will only underscore the value of your CRM. Ascendix Search saves you time by helping you filter your data sets by multiple variables with ease. No more hunting line by line through Salesforce for Prospects.

If during a call block, I want to set up a list of Prospects by geography, size, industry, Ascendix Search gets it done in seconds. It is super user-friendly, and the Ascendix Team is always there to help get you on the right track. It is without a doubt the most valuable component to my CRM.

Michael Branton

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We migrated over to Salesforce from Microsoft Dynamics with an overwhelmed amount of data and no easy, straightforward way to sift through it all. Ascendix Search has given us the ability to create customizable views for prospecting and targeted marketing.

It is extremely user-friendly and great for those who were overwhelmed with reports. The page split view means you never have to toggle between records and your results and has been helpful when we need to visualize the data on a map. Ascendix Search has revolutionized the way our brokers cold-call. It has also given us valuable insight into where our data may be lacking and how to improve on that.

Claire Pistek

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SEARCH

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