



Deal Flow Management For Salesforce.

Deal Teams For Admins

Provide your team with a tailored solution that serves all their needs for deal flow:  deal teams

- ✓ 100% Salesforce native, very little lift for you for set-up
- ✓ All core capabilities of Salesforce are available to your team.
- ✓ Speed is optimized; there's no lag time often experienced with API integration.
- ✓ Data is completely secure, because it never leaves Salesforce servers.
- ✓ Utilizes templates with pre-set configurations (tags, custom fields, workflows, etc.) to provide best-in-industry processes for the corporate investment team.
- ✓ Automates workflows for tagging, field notification, and permissions that are crucial efficiencies for you and the investment team.

Main Features



Tagging & Custom Fields



User Configurable Kanban Board



Smart Lists



Powerful Automation



Optimized Deal Flow



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