

# **Customer Relationship Management “CRM”**



## *What is CRM?*



# Salesforce.com

The screenshot displays the Salesforce CRM interface for the account 'Green Dot Media\*'. The browser window shows the URL 'https://na1.salesforce.com/00130000003H#?'. The page header includes the Salesforce logo, navigation tabs (Home, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Workspaces, Google Docs), and a user menu for 'force.com Sales'. The left sidebar contains the UCIGO logo, a search bar, and a list of recent items including 'Green Dot Media\*', 'David Adelson', and 'Green Dot Media\* - 105k\*'. The main content area shows the account details for 'Green Dot Media\*', including the account owner 'Jim Halper', account name, type 'Customer', industry 'Insurance', and a description 'An innovator in its area'. The address information section shows the billing and shipping address as '1200 17th Street, Denver, CO 80202, USA'. A map of the location is displayed at the bottom, with a callout box showing the address: 'Green Dot Media\*, 1200 17th Street, Denver CO 80202, USA'. The map includes navigation controls and a 'Map' button.

Account: Green Dot Media\* ~ Salesforce - Enterprise Edition - Mozilla Firefox

File Edit View History Delicious Bookmarks Tools Help

https://na1.salesforce.com/00130000003H#?

salesforcecrm sfa

Setup · System Log · Help & Training · Logout

force.com Sales

Home Leads Accounts Contacts Opportunities Reports Dashboards Workspaces Google Docs

Account Green Dot Media\*

Printable View | Customize Page | Edit Layout | Help for this Page

Edit Tags Personal: Target Account

< Back to List: Leads

Opportunities (4) | Contacts (5) | Cases (5) | Open Activities (2) | Activity History (5)

Account Detail Edit Delete Sharing Include Offline Enable As Partner

Account Owner	Jim Halper (Change)	Rating Indicator	★★★★★
Account Name	Green Dot Media* (View Hierarchy)	Phone	(673) 174-5723
Type	Customer	Fax	(673) 174-5722
Industry	Insurance	Website	http://www.greendotmedia.com
Parent Account		Region	Central
Customer Satisfaction Index	A - Extremely Satisfied - Customer Evangelist	Employees	1,000
Support Program	Standard Support	Annual Revenue	\$87,000,000
Total Sales	\$5,000.00	Account Record Type	Advanced (Change)
Description	An innovator in its area.		

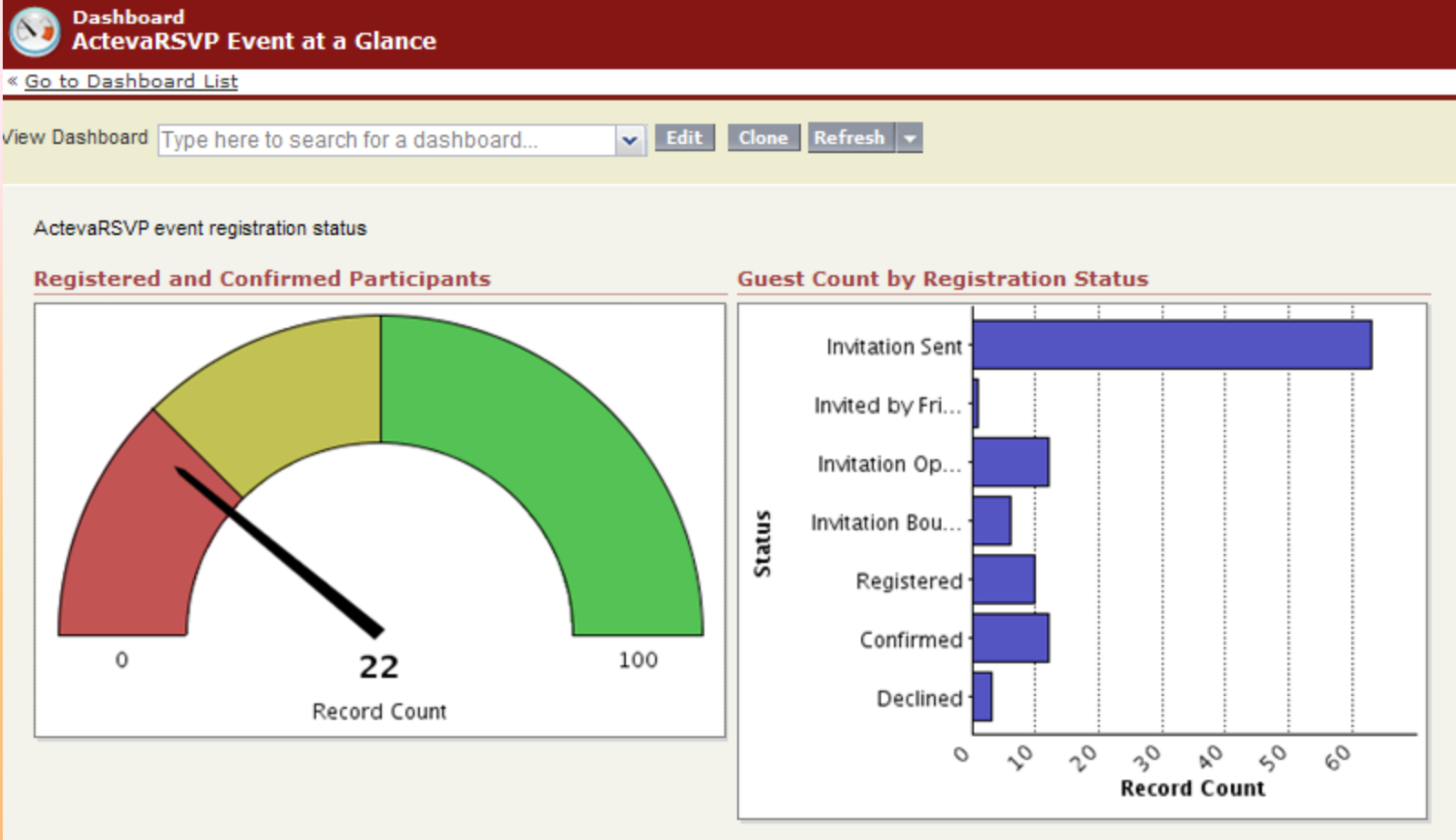
Address Information

Billing Address	1200 17th Street Denver, CO 80202 USA	Shipping Address	1200 17th Street Denver, CO 80202 USA
-----------------	---	------------------	---

Map Satellite Hybrid

Green Dot Media\*  
1200 17th Street  
Denver CO 80202  
USA

# Metrics



# And Reports

## My Personal Custom Reports

- [Edit](#) | [Del](#) | [Export](#) [Sample Report: Closed Sales](#) – How much business have I closed so far?
- [Edit](#) | [Del](#) | [Export](#) [Sample Report: Leads By Lead Source](#) – How many leads has each lead source generated for me?
- [Edit](#) | [Del](#) | [Export](#) [Sample Report: Open Cases By Priority](#) – How many open support cases do we have by priority?
- [Edit](#) | [Del](#) | [Export](#) [Sample Report: Open Deals](#) – What deals have not closed yet?
- [Edit](#) | [Del](#) | [Export](#) [Sample Report: Pipeline By Close Month](#) – What Pipeline Do I Have By Close Month?
- [Edit](#) | [Del](#) | [Export](#) [Sample Report: Sales Pipeline By Stage](#) – How much pipeline is at each sales stage?
- [Edit](#) | [Del](#) | [Export](#) [Sample Report: Top Accounts](#) – Which Accounts are Generating the Most Sales Opportunities?

## Unfiled Public Reports

### Organization and Contact Reports

- [HTML Email Status Report](#) – Show me all HTML emails I sent this week
- [Active Organizations](#) – What are my current organizations?
- [Neglected Organizations](#) – Which organizations need attention?
- [Organization Owners](#) – Who owns which organizations?
- [Contact Role Report](#) – Who are the contacts involved in my current deals?
- [Organization History Report](#) – What is the data history of my organization fields?
- [New Organizations](#) – What organizations have been added recently?
- [Partner Accounts](#) – Which accounts are partners?
- [Mailing List](#) – Who are the contacts at my current organizations?
- [Contact History Report](#) – What is the data history of my Contact Fields?
- [Bounced Contacts](#) – What Contacts have a bounced email address?

### Donation Report

### Campaign Reports

- [Campaign ROI Analysis Report](#) – How are each of my campaigns performing?
- [Campaign Call Down Report](#) – Show me all members of a specific campaign.
- [Campaign Member Report](#) – Show me the members of my campaigns.
- [Campaign Member Analysis Report](#) – Who has responded to my campaigns?
- [Campaign Leads](#) – Which leads have been marketed to in the past?
- [Campaign Contacts](#) – Which contacts have been marketed to in the past?
- [Campaign Revenue Report](#) – Show me revenue generated from my campaigns.
- [Campaigns with Influenced Donations](#) – Show me donations influenced by my campaigns.

# Acteva RSVP

## 1 CREATE



Create branded email invitations and event registration web pages. Incorporate a questionnaire, images, links and more.

## 2 PROMOTE



Invite leads, contacts and campaign members. Send invitations and reminders. Suggest that they "Invite-a-Friend".

## 3 TRACK



Automatically store event registration data, generate new leads, update campaigns, run reports and follow up.

Seamless Integration with salesforce.com

# VerticalResponse



Select a Layout Start from Scratch

### Choose Category:

- Business
- Retail
- Education
- [Real Estate](#)
- Bar & Restaurant
- Travel & Hospitality
- Salon & Spa

### Wine & Wine Retail

- Music & Entertainment
- Events & Reminders
- Seasonal
- Holiday
- Survey Invitations
- Spanish Language (Español)

## Wine & Wine Retail

A grid of nine different website layout templates for wine and wine retail. Each template shows a unique design with various elements like images, text, and navigation. The templates are arranged in a 3x3 grid.



# And more...

AppExchange has **848 Apps** and counting to meet all your business needs including and beyond CRM.

Select any of the categories or subcategories below to find the Apps you need. You will be able to further filter your results later.

## Key Attributes

[Free \(361\)](#)

[Paid \(487\)](#)

[Supported \(558\)](#)

[Top Rated \(431\)](#)

[Native Force.com App \(197\)](#)

[Staff Pick \(33\)](#)

[Discounted for Nonprofits \(117\)](#)

## Type of App

[Applications \(169\)](#)

[Add-Ons \(206\)](#)

[Dashboards & Reports \(43\)](#)

[Sample App Templates \(21\)](#)

[Integration & Data Management \(163\)](#)

[Mobile \(27\)](#)

## Industry Solutions

[Communications \(35\)](#)

[Education \(10\)](#)

[Financial Services \(84\)](#)

[Health Care \(14\)](#)

[High Tech \(156\)](#)

[Manufacturing \(38\)](#)

[Media \(17\)](#)

[Nonprofits \(25\)](#)

[Pharmaceutical \(12\)](#)

[Professional Services \(56\)](#)

[Public Sector \(18\)](#)

[Real Estate \(16\)](#)

[Retail \(26\)](#)