

PALTURAI EXPERIENCE FOR SALESFORCE

An overview of all functions (1/2)

Shortest Path



Shortest contact path to target customers

Intelligent rules determine the shortest contact paths to your target customers based on your Salesforce contacts. To do this, the Paltuai Knows algorithm calculates the probability of a knows relationship between two people through active and historical company activity.

Next Best Customer



Central lead recommendations based on your Salesforce network

On your home page, exactly those companies are suggested to you as potential leads that you can already reach via a warm introduction and that match your current customer profile.

Network



Visualization of companies and decision makers in networks

Current and historical relationships are displayed in clearly arranged graphs. This includes decision-makers, supervisory functions, shareholdings, economic authorizations and much more. Hereby you can always discover new cross-selling potentials in the network of your customers.

Ownerships



Visualization of ownership relationships as tree diagrams

Shareholders and investments are displayed as hierarchical structures in your accounts and contacts. Use this, for example, for new up-selling potentials within large corporate structures.

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An overview of all functions (2/2)

Connected Companies



List of companies you can reach through your Salesforce contacts

Within your contacts, you'll see all the companies that the person is directly connected to or can put you in touch with. Use the connections of your existing business partners for warm introductions to additional new customers.

Master Data Management



Functions for creating and updating business partners

Accounts & contacts can be created or updated with all data from our database at the push of a button. This can save you a lot of time for time-consuming research and data maintenance.

Monitoring Service



Push news service to subscribed accounts & contacts

Important business events are displayed daily on your home page and in the news tab of your accounts & contacts. These include changes in management, shareholders, master data or company status. This way you will always stay up-to-date.

Search



Targeted search for companies and people

Search specifically for companies and people and display the associated network or shortest path. This is your entry point to a comprehensive overview of current and future customers.



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