

# Salesboom: Document Lifecycle Management

PRODUCT SHEET

Knowledge is your most valuable asset. Salesboom has integrated document management functionality within the CRM application, giving you the opportunity to build flows for document creation, collaboration and management, all in the context of your business processes. Salesboom delivers the following operations for easy, integrated, customizable, document management.

- On-Demand – On-Time Access to your Enterprise Repository. With Salesboom you can capture, share and build information holdings from your web based portal.
- Contact and Relationship Management. Salesboom has integrated tools to manage contacts and contact relationships. Build relationships from contact(s) to the document (or any other object) Additional communications tools include: bulk email, mail merge, staff/client phone directories, contact grouping and more.
- User/Group/Role based Security. Documents, events, and contacts in Salesboom can be configured with different permissions and access for any situation. Control of user,read, write, submit, and annotate is at your discretion. Use Audit Trail function to track changes/activities on any object in the system.
- Built-in Workflow. Salesboom has built-in rules based workflow that take objects through multiple levels of approval, using tasks and alerts, before being published.
- Backup and Security. Salesboom guarantees redundant back up scenarios to protect data in the knowledge base including a monthly backup of data, sent directly to your head office. Salesboom guarantees a secure, virus free, document store to each account on the system.
- Reporting. Salesboom generates custom reports based on user-defined parameters via a wizard interface.

## Document Approval Process

Approval and Review workflows streamline the processing of documents.

The Document Approval Process is designed to help define business processes and optimize the flow of documents. Use Salesboom as your corporate portal featuring a range of standard EDM/ BPM functions.

Salesboom workflow can build your approval processes, precisely tailored for each approval event. You can build the workflows using our upgraded workflow wizards, or you can consider Professional Services for a quicker deployment.

## Document Review Process

Different document layers – differentiate source and release documents

Share documents easily and securely via Salesboom. We deliver secure, anytime, anyplace access to documents for sales, marketing, partners ..... all organized in browsable, searchable, categorized libraries.

The workflow wizard will automate your review process incorporating quality checks and reviews prior to publishing document.

## Document Version Control

Salesboom delivers document management functionality.

Key features of Salesboom Version Control:

- check out and work on a document
- check back in - a new version is automatically created
- revision history updates
- in editing process previous version is available / users are aware a new version is being created.
- user notification of all documents they are editing, with a one click option to cancel editing or check back in

Salesboom has over 28,000 subscribers from around the globe, ranging from SMB to Fortune 500 customers, in over 154 countries around the world. Salesboom.com solutions drive innovation, enable business realignment, and enriches customer relations across the enterprise.

## Records Management

Relate documents to any other document , project, product, sales activity in the system.

Salesboom records management functionality associates each database record with each new document or workflow. You can then use these objects as the basis for various reports.

## Document Indexing

Capture any document type into Salesboom .

Indexing of documents takes place automatically as documents are added in Salesboom. The content of the documents are indexed as well as metadata associated with the file. This makes searching in Salesboom extremely fast.

## Document Retention and Disposal

Disposal scheduling is an important aspect of establishing and maintaining control of enterprise record resources. Salesboom has retention and disposal services for enterprise records management using policy based workflows.

## Classification Services

Organize and maintain records and information in Salesboom – our Classification Service uses workflow and relationships rules to build indexes for automation of formal and informal document classification schemes.

## Document Capture

Many businesses find that a considerable portion of their information is still in paper format. If you plan to convert paper files to electronic, Salesboom can automate the process using scanned files uploaded and indexed with additional fields referencing the location of the original hard copy.

## Contact Salesboom

General Inquires	1 877 CRM SALE   1 877 276 7253		
Sales	902.446.4857	Billing Enquiries	902.423.6732
Client Care	902.446.3440	Professional Services	902.423.6712

## Document Keyword Tagging

Keywords are words that a user would associate with the document. This creates a local taxonomy that is popular with users close to the source documents, and makes it easier to members of the group/project to search and find documents.

## Automatic Notification

Salesboom has integrated tools that provide notification services through workflow or Push Panels© . You can configure high level notifications or configure information packages to push to your division, client, customer, as the case may be.

## About Salesboom

Salesboom™ is a world leader in delivery of on-demand Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) solutions.

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