DATASHEET

VANILLASOFT UNITE FOR SALESFORCE

For many organizations, Salesforce is the most integral piece of their sales and marketing tech stack. CRM systems alone, however, are not ideally suited for rapid and efficient lead qualification by inside sales or sales development (SDR) teams. As a result, organizations insert sales engagement solutions like VanillaSoft into their lead funnel, which super-charges their SDRs' ability to book more meetings. The challenge these organizations face is making sure information is passed immediately between systems and teammates to keep sales momentum strong.

VanillaSoft Unite for Salesforce enables real-time, bi-directional information sharing between VanillaSoft and Salesforce, ensuring immediate response by the right sales agent. When SDR teams engage leads in VanillaSoft, updates are immediately transferred to Salesforce Leads, Contacts, Opportunities, and Accounts, helping to ensure immediate follow-up by account executives (AE). Likewise, when Salesforce users identify upsell opportunities, or if accounts are flagged for payment issues, the SDR team is notified immediately – improving customer experience through responsive, timely, and personal communications. Reliable, up-to-date information in both VanillaSoft and Salesforce enables managers to leverage Salesforce reports from one dashboard for end-to-end sales reporting.

HIGHLIGHTS

- Real-time, bi-directional updates
- Reduced SFDC costs
- Improved visibility into sales activity and results
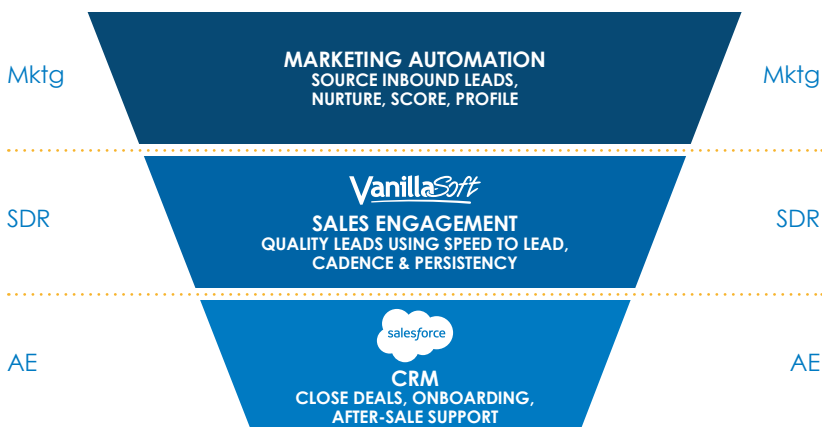- Better customer experience

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SPECIFICATIONS

Salesforce Editions	• Enterprise • Unlimited • Performance • Developer
Salesforce UI	• Salesforce Classic • Lightning
App Requirements	Free from the Salesforce AppExchange
Supported Object Types	• Leads • Contacts • Opportunities • Accounts • Activities (Events, Tasks, History)

THE SALES ENGAGEMENT EMPOWERED LEAD FUNNEL

Mktg — **MARKETING AUTOMATION** SOURCE INBOUND LEADS, NURTURE, SCORE, PROFILE — Mktg

SDR — **VanillaSoft** SALES ENGAGEMENT QUALITY LEADS USING SPEED TO LEAD, CADENCE & PERSISTENCY — SDR

AE — **salesforce** CRM CLOSE DEALS, ONBOARDING, AFTER-SALE SUPPORT — AE

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FEATURE	BENEFITS
Separate Database	Save money on expensive SFDC data use. Store unqualified or marketing qualified leads in VanillaSoft, while keeping only engaged leads and opportunities in Salesforce.
Reduced SFDC Licence Requirements	The SDR team does not need access to Salesforce as they work from VanillaSoft. They can still track lead progression by account executives working in SFDC from the VanillaSoft reporting dashboards.
Better Customer Experience	SFDC triggers – such as overdue payments or new opportunities with existing clients – can immediately be routed to the SDR team so they can provide immediate, personal assistance.
End-to-End Reporting	From one comprehensive reporting dashboard, users can track the entire history of a lead, conversion ratios, determine lead success criteria, and map performance at each sales stage and from each team.
Real-time Updates	Information is relayed between systems without delay, empowering immediate action from the appropriate resource and reducing lead decay.
Control Bi-Directional Data Flow	Push from VanillaSoft to Salesforce in real-time. Push from Salesforce to VanillaSoft in real-time or as a batch.
Multiple Data Transfer Triggers	In VanillaSoft, each time a sales rep results a record, information is immediately shared with Salesforce. From within Salesforce, each time a field in Leads, Contacts, and Opportunities is updated, it will update the corresponding field in VanillaSoft.
One Admin	There is no need for the system admin to bounce between applications, as integrations between both systems can easily be configured from within Salesforce.

CONFIGURE AND MANAGE YOUR INTEGRATIONS FROM EITHER SALESFORCE LIGHTNING OR CLASSIC

Engage More. Talk More. Sell More.

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