reference edge℠

Native Customer Reference Management for Salesforce®

Managing your customer reference information and content is an intrinsic part of CRM. If Salesforce is your CRM solution then you want your Sales team to find reference functionality and information where it's most convenient: Opportunities, Accounts and Contacts. The marketing team should operate in the same environment as Sales, enabling effortless navigation between reference management tasks and standard Salesforce records such as Accounts, Contacts, Cases and Opportunities. All reference data should reside in the same place, be real-time, and be accessible using Salesforce Reports and Dashboards.

Life is better when the reference program app lives in Salesforce, and that is the vision behind ReferenceEdge.

Features Include:
- Peer2Peer and Managed Requests
- Reference Project Workspace
- Purpose-Built Reference Search
- Nominations
- Content Microsites
- Microsite Social Sharing
- Customer Rewards
- Mapped Tags
- Salesforce Mobile Support
- Reference Matching Engine
- Pipeline Management
- Reference Content Management

AVAILABLE ON

salesforce appexchange

Secure: If your IT security team endorsed Salesforce, they've already endorsed ReferenceEdge because the built-in authentication and permissions controls apply to ReferenceEdge. Your customer reference data resides in Salesforce. Native apps like ReferenceEdge undergo additional technical and security reviews by Salesforce before qualifying for the AppExchange.

Scalable: Salesforce scales to hundreds of thousands of users. Some of the largest organizations in the world run on Salesforce. ReferenceEdge runs on the same robust platform.

Embedded: With ReferenceEdge there is no integration required with Salesforce. ReferenceEdge is an AppExchange-certified, native salesforce app that is 100% embedded in your Salesforce environment.

There is no synchronization required because it's all one database – ReferenceEdge lives IN salesforce. The difference between "integrated" and native is massive. As a native app, ReferenceEdge can leverage all that Salesforce has to offer from multi-language support, to workflow rules, reports and dashboards, Chatter and so much more.

User adoption is of the highest priority for any technology. Users of ReferenceEdge don't realize they're using anything but Salesforce because we adhere to familiar UI designs. Customer reference functionality is where it should be, and the learning curve is flat for veteran Salesforce users.

Technical Integration: Customer reference information is too valuable to live in a silo. Now Customer Success, Account Management and other stakeholders can search and contribute to customer reference knowledge. ReferenceEdge has pre-built integrations to Influitive and Gainsight with many more possible via the Salesforce API.

Best Practices Built-In: We've been supporting customer reference programs since 2003. All that we've learned was used to design, from the ground up, an app for the next decade. A lot has changed since 2003 and a lot will change in the coming years. Our flexible design ensures we'll adapt to your needs.
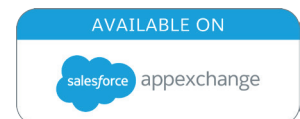
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