ULTIMATE ACCOUNT
SEE YOUR ACCOUNTS IN A WHOLE NEW WAY

Now you can navigate your most complex accounts with ease. Roll everything up for the big picture. Unroll with one click for the details. See opportunities clearly and make smarter, more profitable decisions.

For organizations managing complex, multi-level accounts on Salesforce, seeing account information clearly is a challenge. Big client accounts may be fragmented into different locations, subsidiaries, sub-brands, and divisions, and each has its own opportunities, contacts, and activities.

Without a way to see the information holistically, account activities become uncoordinated, client service suffers, and profitable opportunities are lost.

Get a 360° view

Ultimate Account plugs into your existing Salesforce configuration, providing total flexibility and visibility across account hierarchies. With one click, you can access a 360° view of all account activity, drill down to individual sub-account details, and assign custom filters that help you eliminate noise and pinpoint the opportunities, trends, activities, and revenue streams that drive your business success.

Gain control

Roll up accounts and filter custom views using any criteria you choose. Drill down instantly to review the activities and performance associated with any sub-account, then flow it all together for a high-level view of the complete account. With Ultimate Account, you'll gain a new level of control and precision over all your accounts.

Ultimate Account is for Companies with:

- National/global accounts and complex account hierarchies

- Multiple locations, subsidiaries, and divisions

- Multiple departments servicing a single client or client group

1. Customize filters to set a specific view.

2. Navigate the complete hierarchy of parent/child accounts.

3. Roll up data across multiple accounts to see the big picture: opportunities, profits, case status, and more.

Key benefits

- Out-of-the-box solution. Get the functionality you need, with no development costs or delays.

- Low-cost subscription model. Keep costs minimal with fees as low as $5 per user per month.

- 100% Force.com native. Enjoy superior integration, performance, usability, and security.

- Industry responsive. Use the solution developed in consultation with real-world industries.

ULTIMATE ACCOUNT: Designed for complex, fast-moving industries

- Gain better visibility and control over accounts

- Measure performance more accurately

- Drive greater user adoption and engagement

- Support closer collaboration among teams

- Identify more opportunities and close them faster

Ultimate Account is ideal for…

Strategic account managers who own complex enterprise accounts. Managing national or global accounts requires a high level of oversight into different territories, regions, and sales teams. Ultimate Account helps strategic account managers see and coordinate efforts more effectively.

Manufacturers selling through multiple channels. From the assembly line to the end-user, manufacturers need clear visibility into their channels. Ultimate Account enables manufacturers to create a single view of products moving through distributing, wholesale, and retail channels so they can identify and address issues sooner.

Ad sales departments managing multiple brands for a multinational account. Managing multiple brands requires open communication, close collaboration, and a high degree of coordination. Having a single, dynamic view across account hierarchies ensures team efforts are aligned, budgets are tracked more closely, and clients are serviced more efficiently.

About Shift

Shift is a Salesforce Silver Cloud Alliance Partner with more than 150 years of combined experience implementing, configuring, and re-envisioning the world's #1 sales and service platform. We also offer a range of off-the-shelf technology solutions designed to enhance and extend Salesforce functionality for small businesses and Fortune 500 organizations in specialized industries including technology, manufacturing, media and communications, healthcare, the nonprofit sector, and professional services. Headquartered in Toronto, Canada, with a local presence in Ottawa, Vancouver and New York, we provide both remote and onsite service to a global client list.

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