Salesforce Plug-in

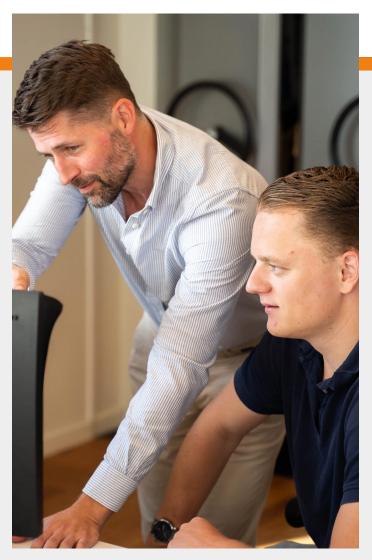Keep your CRM up-to-date with the CreditDevice Salesforce plug-in

CreditDevice

Salesforce

An organized CRM system gives your sales team a clear picture of their sales pipeline. It feeds your in-bound marketing strategy and makes it easier to concentrate on customer satisfaction and retention. When the number of contacts in your CRM increases it becomes more difficult to keep your data clean and up-to-date. The CreditDevice Salesforce plug-in offers the solution.

Keep your CRM up-to-date with automation

It is a common problem: clients appear several times in your CRM-system, you are sending marketing campaigns to inactive companies and you not aware of address changes of your customers. Daily dilemmas which are difficult to solve. Because how do you maintain an enormous database with important client and prospects data without making any mistakes?

The answer is simple: by automating your maintenance. The CreditDevice Salesforce plug-in makes this possible. With this you keep your CRM always up-to-date!

Start with clean data

The first step is to clean up your CRM-system completely when you start using the plug-in. We will help you and will make sure that you only have qualitative and clean data in your CRM. After that the plug-in will enrich your CRM with important company information. It automatically fills your existing and new accounts with relevant business information, financial data and sales and marketing information. This will not only give you a complete but also a clean picture of your customers.

CreditDevice

Clean and up to date data

Discover the advantages

01

Avoid mistakes

Manually adding customer data is not only time consuming but also very error prone. Besides, you never know whether the information you filled in is actually correct. With the Salesforce plug-in you no longer have to doubt about this. Due to the connection with our database all fields are automatically filled with the correct data.

02

Easily create new accounts

When you are creating a new account you no longer have to fill in the company data yourself. Simply search for the chamber-of-commerce number or company name, select the right company and your account will be created in just a few seconds.

03

Avoid duplicate accounts

A common problem is all CRM-systems are duplicate accounts. One company exists two or sometimes even more times in your CRM. With the plug-in this is a thing of the past. Existing companies are marked red, which means that you always know which accounts are already in your CRM and you are no longer able to add a company twice.

04

Always work with current data

Companies are always evolving. When you create an account, the company can for example change its name, change its address or even go bankrupt. It is impossible to keep track of all these changes and adjust them manually. The Salesforce-plugin does this for you, automatically and on a daily basis. If you do not want the system to overwrite a company automatically, no worries you are in charge. Just select the 'do not overwrite option' and the data will remain the same.

Direct insight in the credit worthiness of a company

With almost 20 years of experience in collecting financial data, the plug-in obviously also has a connection with the CreditDevice credit information module. Do you want to know the financial status of a customer of prospect? Request a credit report directly from your customer file. The module automatically generates a report and saves it in the Salesforce application. And super handy the most important financial data is shown directly in the account of your customer.

The Plug-in gives you access to the CreditDevice database with the source data of over 330 million companies worldwide. This is how you can easily keep your CRM up-to-date with accurate and validated company information.

CreditDevice

Want to know more?

We are looking forward to meeting you.

Give us a call on +31 71 36 400 60 or leave a message on our website (www.creditdevice.com/en/contact) and we get back to you as soon as possible.

CreditDevice was founded in 2001. It was time to take a fresh look at the future of credit management. The purpose: to help organizations limit their credit risks by offering solutions and creating added value. Our foundation is the dataset with which credit decisions can be made. We build software solutions around it. Our software is a work in progress and therefore always in line with current developments. CreditDevice is the only company in the Netherlands that combines credit management software that it developed in-house with its own credit information database.

With our Credit Management Software, we help customers to simplify their communication with regard to outstanding invoices. We develop the software ourselves, because we know what our customers need.

CreditDevice. Credit Management solutions.
www.creditdevice.com

CreditDevice
Rudolf Tappenbeckweg 4
2202 CD Noordwijk
The Netherlands

Phone: +31 71 36 400 60
E-mail: info@creditdevice.nl
Website: www.creditdevice.com