

ClientDNA

One customer record for sales, marketing and service

A complete CRM that runs sales, marketing and customer service on one shared customer record, and hands orders cleanly to operations when the deal closes.

WHAT IT DOES

- A funnel that reflects how deals actually move
- Marketing campaigns against the same records sales works
- Customer service history on the customer, not in a separate tool
- Opportunities convert into ERP orders without re-keying
- Handoff queue to operations, so neither side writes into the other
- Full document management, help and ticketing, like every app in the suite

Who it is for. Any business that wants its CRM and its ERP to agree.