



CREATIO

EXTENDED PROFILE



OVERVIEW





SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Creatio
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✓
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✓
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✓
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✓

SALES GAMIFICATION	✓
QUOTATION HANDLING	✓
TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✓
CUSTOMER SIZE	
SMALL (1-50 USERS)	✗
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
OTHER FEATURES	
MULTIPLE LOCATIONS	✗
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	✗
MOBILE FEATURES	
IOS APP	✗
ANDROID APP	✗
NATIVE WEB APP	✓
HOSTING METHOD	
CLOUD	✓
ON-PREMISE	✓
FURTHER INFORMATION	

SOFTWARE SCREENSHOTS

The screenshot displays the 'Top Performers' dashboard in bpmonline. The interface includes a left-hand navigation menu with options like Sales, Dashboards, Feed, Leads, Accounts, Contacts, Activities, Opportunities, Orders, Invoices, and Documents. The main content area features several data visualization components:

- Top 5 Sales Reps by Paid Invoices:** A table listing sales representatives and their total paid invoice amounts.
- Top 5 Sales Reps by Opportunity Amount:** A table listing sales representatives and their total opportunity amounts.
- Best Sale:** A green card showing a value of \$17,200.
- Average Number of Meetings:** A blue card showing a value of 13.
- Average Number of Calls:** An orange card showing a value of 16.
- Top 5 Sales Reps by Number of Meetings:** A table listing sales representatives and their number of meetings.
- Top 5 Sales Reps by Number of Calls:** A table listing sales representatives and their number of calls.

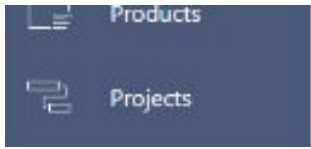
The dashboard also includes a search bar at the top with the text 'What can I do for you?' and a 'GO' button, and a user profile icon in the top right corner.

Sales Rep	Paid Invoices
John Best	144,640.00
Symon Clarke	78,555.00
Mary King	25,010.00
Regina V. Cook	0.00
Jason Robinson	0.00

Sales Rep	Opportunity Amount
John Best	130,970.00
Mary King	33,950.00
Symon Clarke	27,560.00
Megan Lewis	20,945.00
Peter Moore	1,275.00

Sales Rep	Number of Meetings
John Best	13
Symon Clarke	2
Valerie E. Murphy	2
Regina V. Cook	0

Sales Rep	Number of Calls
John Best	9
Valerie E. Murphy	4
Megan Lewis	3
Regina V. Cook	0



Agent home

What can I do for you?

Cases

SR-203	How can I create an account on your site?	Status: In progress	Resolution time: 02/22/2015 14:40
SR-202	What is the expected delivery time for my order?	Status: In progress	Resolution time: 02/20/2015 11:30
SR-198	Sent emails are not received	Status: Resolved	Resolution time: 02/18/2015 12:30
SR-197	Low level of Wi-Fi signal	Status: In progress	Resolution time: 02/17/2015 10:00

John Best
The server is available after maintenance work. Please, check Today 20:02 2 Comments

John Best
The system is currently unavailable due to maintenance work. Please check back in an hour when the maintenance is over. Today 20:02 2 Comments

John Best
We continue cooperation with Axion Company! Now contact us again yesterday. Congrat! Today 18:00 2 Comments

John Best
Dear colleague! According to the last three months results, our customer level has increased by 20% and stood at 4.7. This is the best result for the last two years! Thanks to everyone who contributed to the success. Let us not rest on our laurels and become even better!

My KPIs

Cases registered today	24
Cases resolved today	20
Average time to resolve the case	3.5
Satisfaction rate	4.6

Opportunities

What can I do for you?

INVOICE PAYMENT DYNAMICS

Invoice payment dynamics

4-2015: 38,429.81 | 5-2015: 60,723.35

Pending payments this month

334,211

Pending invoices total: 140,843 | Revenue this month: 455,789

Top 10 opportunities to close

003 / Axion / Package	Axion	Mary King	12,000.00
009 / Streamline Development / Sale of Goods	Streamline Development	John Best	11,000.00
004 / Factorial Services / Package	Factorial Services	Jason Robinson	10,000.00
004 / Brenda Lynn / Package		John Best	4,500.00
000 / Andrew S. Barber / Sale of Goods	Infocom	Murphy Valerie	2,000.00
002 / Alpha Business / Sale of Services	Alpha Business	Symon Clarke	1,300.00

New opportunities by category

4-2015: 85,680 | 5-2015: 94,100

4-2015: 27,793.2 | 5-2015: 21,500

Campaign

What can I do for you?

Bpmonline Networking Day

Status: Completed

1 want 45.0 % of participants to visit the event!

Participants: 138 | Reached the goal: 75 | Goal reached!

Campaign workflow

Registration → Thanks (23 days) → Presentation → Reminder clicked → Network Day → Reached the goal

Tools

- Bulk email: Thanks
- Start: Thank you for registering o...
- Sender's name: bpmonline_info
- Sender's email: info@bpmonline.com

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