



# Grow faster with Pro Suite — the flexible CRM suite.

## Get email outreach, sales, service, and commerce tools in a single app.

Take your business to the next level with Pro Suite. Develop long-lasting customer relationships and fuel efficient growth with upgraded features, like customization, automation, and access to AppExchange.

## Grow with powerful customization and automation.

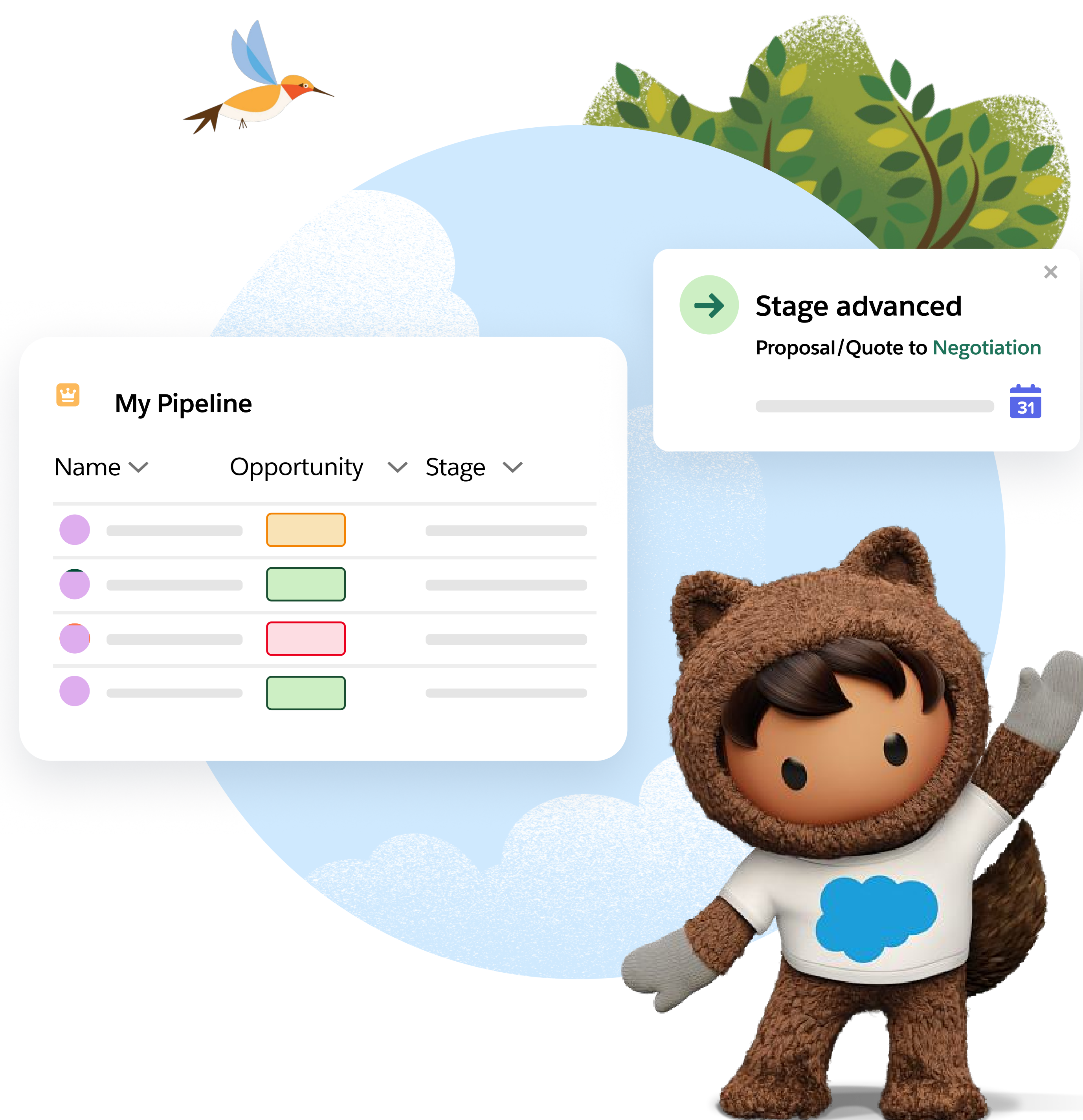
Take advantage of custom apps, objects, and automation to shape your business growth.

## Equip sales teams with quoting and forecasting.

Create and manage price quotes for products and services. Plus, monitor and predict your revenue with forecasting tools.

## Engage customers in real time across support channels.

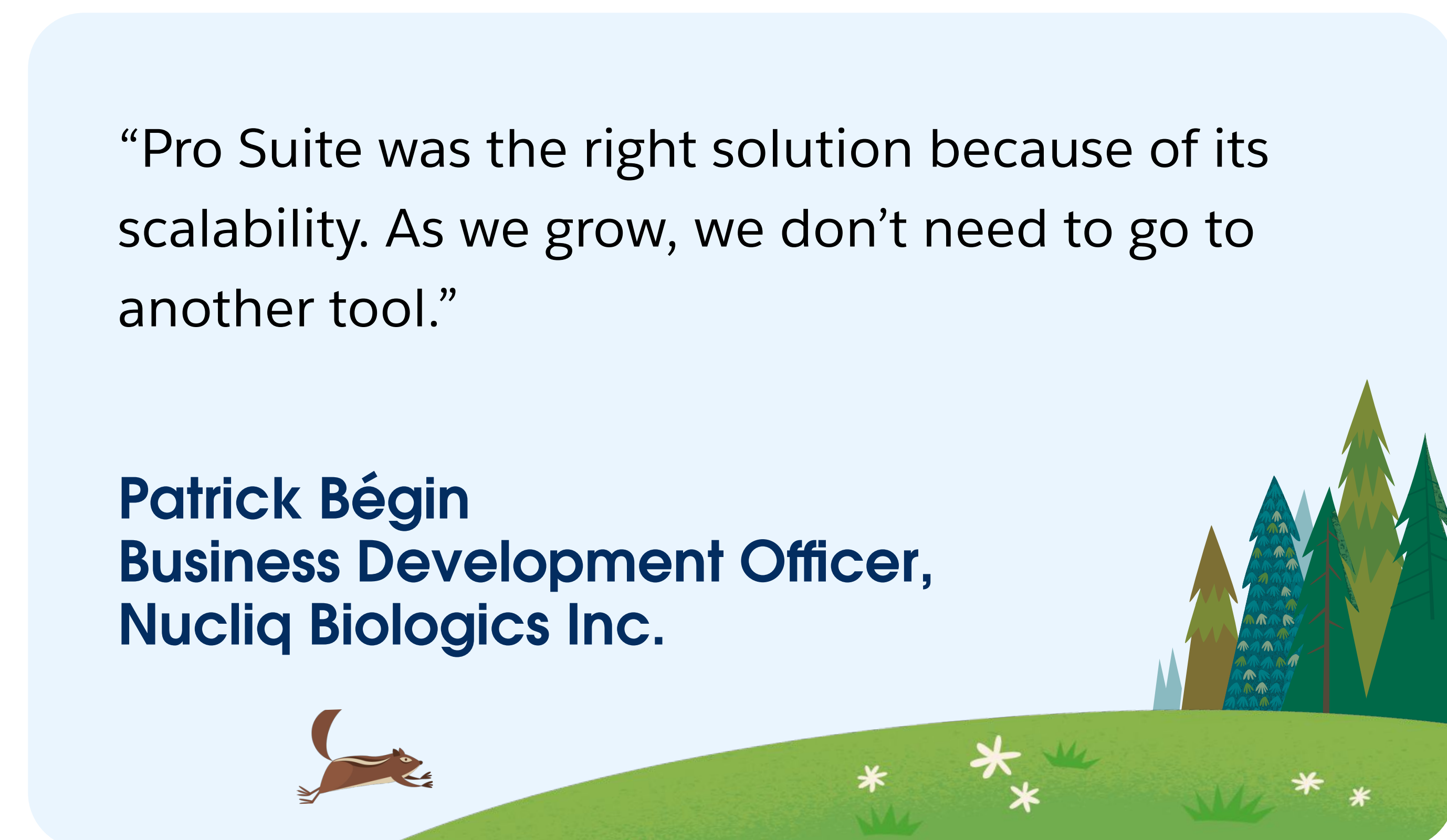
In-app and web messaging lets you provide real-time support directly from your website or application.



## See what Nucliq has to say about Pro Suite.

“Pro Suite was the right solution because of its scalability. As we grow, we don’t need to go to another tool.”

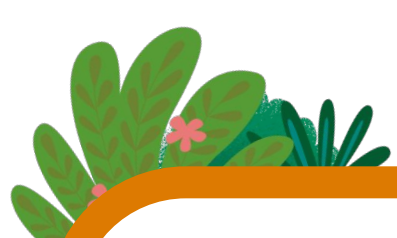
**Patrick Bégin**  
Business Development Officer,  
Nucliq Biologics Inc.





# Dive deeper into Pro Suite.

Do more with automation and customization, and grow your business across email outreach, sales, service, and commerce.



## Email Outreach

### Dynamic Lists

Easily segment leads and customers into business-critical lists for personalized and effective outreach.

### Email Templates

Create beautifully branded emails for sending company updates and offers.



## Commerce

### Pay Now\*

Streamline payments by offering various payment options and sending secure payment links directly from your CRM.



## Sales

### Homepage

Get a daily digest of your contacts, leads, opportunities, and to-dos in one place.

### Easy Email Integration

Connect Pro to your email inbox, and use Einstein Activity Capture to keep your email and calendar in sync.

### Out-of-the-box Sales

Easily manage your pipeline and opportunities with simplified, built-in sales stages.

### Default Dashboards and Reporting

Start with a set of intuitive dashboards with key sales reports. Then configure and customize as you'd like.

### Quotes

Create and manage quotes for multiple products or services to optimize sales cycles.

### Forecasting

Predict sales revenue and gain insight into your sales performance.





A pink rounded rectangle with a decorative floral and leaf border at the top. Inside the rectangle, the word "Service" is written in white text.

### **Connect Email Support**

Integrate email as a support channel directly into Pro, so you never miss a customer service request.

### **Case Management**

Manage all the details related to your customer service requests and support them directly from the case.

### **Knowledge Management**

Create and publish knowledge articles to enable your team or customers.

### **Automate Repetitive Tasks**

Use custom email templates and quick text to address common issues with prewritten support solutions.

### **In-App and Web Messaging**

Provide customers with personalized chat experiences from your mobile app or website.

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### **Custom Apps and Objects**

Streamline your CRM experience with custom apps, and tailor your data even more with custom objects.

### **Process Automation**

Use enhanced options to automate and streamline various processes using approvals and flows.

### **Testing Environment**

Test changes and play around with features before they go live. Plus, give new users a safe place to hone their CRM skills.

### **AppExchange Access**

Get access to AppExchange, a marketplace for packages that help you extend your CRM to external systems, applications, and data sources.

