

# WE for Salesforce

Certified ISV Partner since 2014



- + **One Click:** Add wealth intelligence to single records or lists with one click
- + **Work Smart:** Prioritize your fundraising efforts using Salesforce reporting and WE data
- + **Streamlined Prospecting:** Push new leads directly to Salesforce from WealthEngine
- + **360 Degree View:** Access complete wealth profiles on all your prospects and donors

## Wealth Insights, Delivered Directly to Salesforce

WE Salesforce Connector establishes a powerful link between our WealthEngine Platform and Salesforce, providing you with valuable and easy access to comprehensive wealth insight.

## Best-of-breed CRM, meets worldclass WealthEngine Platform

Connecting Salesforce with WE's world-class WealthEngine Platform, brings Salesforce users direct access to more than 50 WE data elements and proprietary wealth scores and ratings.

With WE Salesforce Connector you have what you need to take your prospect research and screening efforts to the next level with new insight and productivity.

## Powerful Capabilities

With WE Salesforce Connector knowing more about your audience is simple and easy:

- » Import essential wealth profile ratings and scores with a seamless, one click experience directly in Salesforce.
- » Link to detailed ratings and scores from WE to contacts leads, or person accounts, using advanced prospect research functionality.
- » Screen a list of records with a click of a button right from within a Salesforce campaign for real-time insights.
- » Automatically append wealth data upon creation of your records to provide actionable insights on your prospects.
- » Send new leads directly to Salesforce from WE Search or Prospect to quickly find the most qualified prospects.
- » Options for light and power users based upon your team's research needs.
- » Sales, Service and Nonprofit Success Pack compatible.

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"Donor research and qualification has been streamlined thanks to WealthEngine. This is a must have tool for all not-for-profits"

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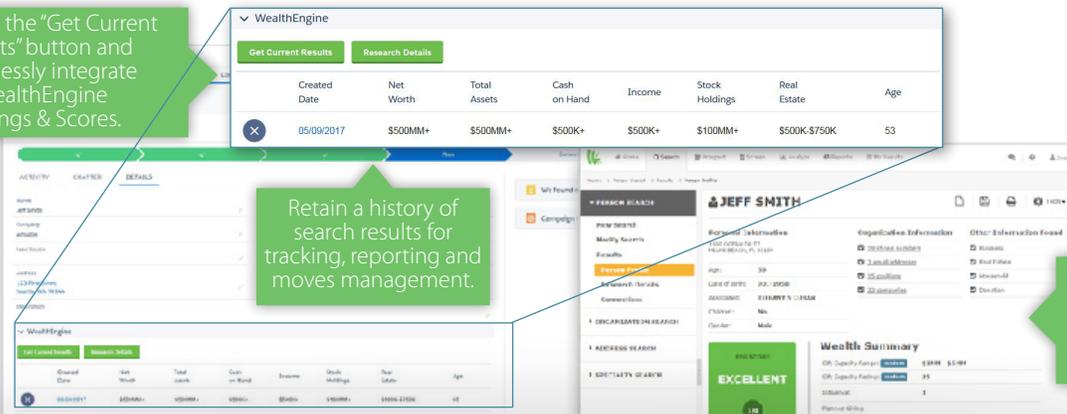
-WealthEngine nonprofit client



Click on the "Get Current Results" button and seamlessly integrate WealthEngine Ratings & Scores.

Retain a history of search results for tracking, reporting and moves management.

With a click of the mouse, easily view WealthEngine Advanced Search Results within the WealthEngine Platform.



## Unleash the Power of Wealth



We help you find, understand and contact wealthy prospects. We use unique data to remove the guesswork from sales, marketing and fundraising so that you engage with people most likely to buy, invest or donate and don't waste time on the ones that won't. Our wealth and lifestyle data provides a more complete view of your donors & prospects so you can personalize your engagement efforts and run more effective campaigns.

Our machine algorithms and data scientists have worked with thousands of nonprofit client for over two decades. With WealthEngine, you can harness that knowledge along with that of your teams; providing actionable insights and easy-to-use solutions that are integrated into the way you work.

## Trusted Partner



We are a Certified ISV Partner with over 500 joint customers with Salesforce. When you combine 20+ years of wealth knowledge, the best data science in the world and a very large amount of data, you get insights and opportunities that no one else finds.

## Our Data



More than 3,000 companies trust WealthEngine because our solutions are powered by the largest consumer wealth database in the industry. With over 250 million consumer profiles, each with 1,500 attributes, we leverage nearly a half trillion data points to provide powerful marketing intelligence.

## Get Started Today

Visit us on the Salesforce AppExchange by searching for WealthEngine Salesforce Connector. Contact us at 800.933.4446 or visit at [wealthengine.com](http://wealthengine.com).

50+ WealthEngine Data Elements



Integrated Directly into Your Salesforce



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