CRMRepos® is a feature rich report automation tool for Salesforce.com CRM.

CRMRepos® from isolvIT uses your existing CRM Salesforce.com reports and gives you unprecedented abilities to automate, format, and distribute reports – saving time, adding reliability, robust security, and extensive auditing features.

Automate Your Reporting; Streamline Operations

Securely distribute leads to individual sales representatives and send an overall lead report to sales managers, as frequently as every 15 minutes. Gain the ability to format excel reports in advance, and save all settings for future report runs, freeing your time for more important endeavors. From customizing the header and footer, to being able to use fit-to-print settings, create filters, freeze both rows and columns, and more - CRMRepos makes your reports even more dynamic and user friendly and adds new report formats unavailable in SFDC.

Simplify Reporting and Distribution

Empower your users to schedule reports and have the system automatically post them securely for external access, or encrypt and distribute them automatically to one person, or a group, in the file format that works best for them.

Extended Security

Provides a comprehensive way to manage, create, and deliver unique report passwords for encrypted reports, easily, from within the system itself.

Expand Audit Preparedness

Optionally archive a copy of each report as of its run date, providing transparency and protection for your business during audits -- which can help your company avoid expensive and potentially damaging legal action. This also eliminates the need for end users to save reports, centralizing storage and reducing exposure and storage requirements.

Cloud-based, multi-tenant solution

Keep your costs low and ensure the system is available when you need it, wherever you are in the world.

Features and Benefits

- **Encrypt** files and send them securely from within the system.
- User and password management and notifications
- Deliver files via customized email or self-serve
- Personalized Email including records count, date run based on recipient **Time Zone**
- Save report files as virtually any format, including: XML, XLSX, XLS, PDF, CSV and Pipe Delimiter
- Automate reports that pass parameters, vastly improving operational efficiency
- Format MS Excel reports (**Excel Object**), and save those settings for future report runs, including: 'fit-to-print', filters, sorting, freeze rows and columns, and header and footer customization
- CRM Format (report formatted on CRM) pass-through
- Group multiple reports into one Excel file (multi-sheets)
- Slice & Dice® - Unspecified Recipients - Product Sheet
- Add/Change Columns after Run, optional default value
- Up to 55k Records using SOQL API through existing report
- **No 2k limitation** - Allow for unlimited allowed Records
- Reducing Large Report size, 85k records, **55MB** to **5MB**
- Report schedule management. Up to 96 time/day
- Report run audit log: see who's received which report, how they received it, and when.
- Optional report archive, saving reports as of their run date

Customer Testimonial

"CRMRepos from isolvIT creates consistent, repeatable and reliable automated reporting out of Salesforce.com. Not only do we have unprecedented control over output formatting and security, we now have report consistency that our end users can depend on. It's a much better customer experience for our end-users. At the same time, we are freeing up resources to work on higher value tasks. It is hard to imagine that we had two trained resources dedicating part of their time to doing weekly and monthly reporting, one acting as a backup for the other, where we can now leave that important, yet mundane work to automation."

– JC, customer at large Boston-based financial services company

Call 1 (508) 838-7725 or Contact Us

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