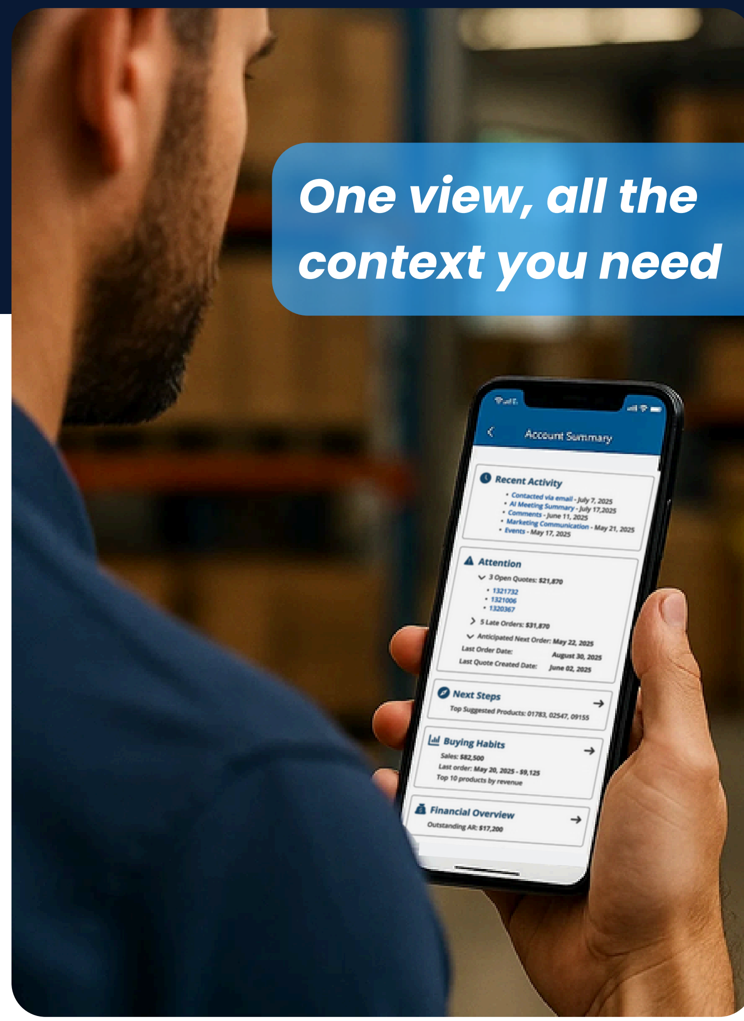
WHITE CUP

FACT SHEET

AI Account Summaries

Know every customer's story before the conversation even starts.



One view, all the context you need

Make every sales conversation faster, smarter, and more profitable.

Context drives every customer conversation, but getting it shouldn't slow your team down.

With AI Account Summaries, that context is already waiting.

Quotes, orders, AR, and buying trends come together in one intelligent view inside CRM, giving teams the clarity they need to act fast and stay ahead of every customer.

What it does

- **Surfaces what's changing.** Instantly see open quotes, late orders, upcoming reorders, and overdue balances.
- **Turns insight into action.** Drill into quote or order details, create follow-ups, or email directly – no system hopping.
- **Understands distribution.** Shows bill-to / ship-to relationships, reorder patterns, and margin trends that generic CRMs can't.
- **Works wherever you do.** Same experience on desktop and mobile for all CRM users.
- **Keeps teams aligned.** Leaders and reps see the same real-time account picture — no filters or guesswork.

Why it matters

- **For Reps:** Faster prep, fewer steps, more confident conversations.
- **For Sales Leaders:** A consistent, accurate view of account health and team activity.
- **For Executives:** True visibility into customer performance and margin risk – no reports required.

Stop searching for answers. See them the moment you open CRM.
Schedule a demo today to see it in action →