

# BoostUp Self-Serve Admin Studio

## Cut down implementation time by 50%.



BoostUp puts the control in your hands and adapts to the way you run your business, forecasting and sales process.

**BoostUp's Self-Serve Admin Studio** cuts down implementation time from months to weeks by giving the power to RevOps administrators. Administrators can quickly make changes, set up and configure custom fields, metrics, layouts and more without depending on support from the BoostUp team. Configure your forecast process, business types, roll-ups and metrics directly in BoostUp's Self-Serve Admin Studio.

### User Administration

Every organization has unique configurations and custom models to drive its business. Regardless of your setup, BoostUp can be configured to easily map to your revenue model and business needs with just a few clicks.

BoostUp supports multi-currency, multi-CRM, custom objects, and ultra-complex business models.

### Self-Serve

BoostUp gives you the flexibility to make adjustments to how you forecast. With a few clicks in BoostUp's self-serve environment, administrators can:

- Manage user hierarchy and roles, both manually and from the CRM
- Enable any forecasting metric
- Map fields from CRM
- Add new business types
- Customize your roll-ups page
- Add new filters, changes column order preference and names
- Build custom dashboards, views and reports

The screenshot displays the 'FORECAST SETTINGS' configuration page. It includes sections for 'General Settings' (Submission Schedule, Frequency, Submission Window, and Enable include/exclude deal), 'Forecast Submission Types (3)' (a table with columns for Name, Period Type, Period, Business Type, Roles, and Actions), 'Configure Roll Ups Table Columns (1)' (a table with columns for Order, Column Name, Visible to Business Type, Visible to Roles, Enable, and Actions), and a 'Configure how you want to group by Roll ups table' section at the bottom with a 'Select Object Field' dropdown and a list of available fields (User Name, Role, Territory, Region).

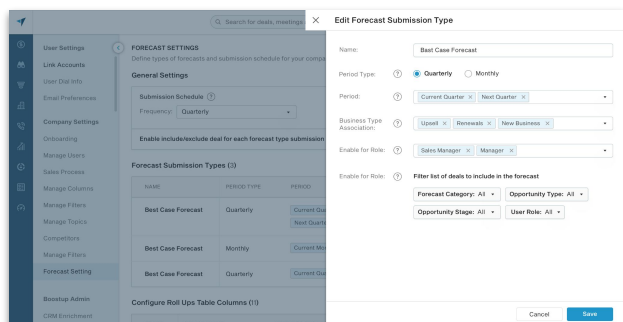
NAME	PERIOD TYPE	PERIOD	BUSINESS TYPE	ROLES	ACTIONS
Best Case Forecast	Quarterly	Current Quarter Next Quarter	Upsell   Renewals New Business	Sales Manager   Manager	✎ 🗑
Best Case Forecast	Monthly	Current Month	Upsell   Renewals	All	✎ 🗑
Best Case Forecast	Quarterly	Current Quarter	New Business	Regional Manager	✎ 🗑

ORDER	COLUMN NAME	VISIBLE TO BUSINESS TYPE	VISIBLE TO ROLES	ENABLE	ACTIONS
1	Manager/Account Executive	Upsell   Renewals   New Business	All	🔵	🔒 ✎ 🗑
2	Target	Upsell   Renewals   New Business	All	🔵	✎ 🗑
3	Booked	Upsell   Renewals   New Business	All	🔵	✎ 🗑
4	Commit	Renewals   New Business	Sales Manager, Account Executive	🔵	✎ 🗑
5	Best Case	Upsell   New Business	Sales Manager, Account Executive	🔵	✎ 🗑
6	In Play	Upsell   Renewals   New Business	Sales Manager, Account Executive	🔵	✎ 🗑
7	All Active	New Business	Sales Manager, Account Executive	🔵	🔒 ✎ 🗑
8	Total Pipe	Upsell   New Business	Sales Manager, Account Executive	🔵	✎ 🗑
9	Submitted Forecast	Upsell   Renewals   New Business	Sales Manager, Account Executive	🔵	✎ 🗑
10	Forecast Projection	Upsell   Renewals   New Business	Sales Manager, Account Executive	🔵	✎ 🗑
11	Pipeline Gap	Upsell   Renewals   New Business	Sales Manager, Account Executive	🔵	✎ 🗑
12	Pipeline Coverage	Upsell   Renewals   New Business	Sales Manager, Account Executive, Regional Manager, Sales Ops, VP/AVP Sales, CRO	🔵	✎ 🗑

*"We found BoostUp to be the most comprehensive RevOps platform out there. Its unified Front Office interface brings data, processes and prescriptive actions together. Its self-serve environment is easy to configure and easy to use, reflecting in wide adoption."*



Official Review, RevOps Consultant



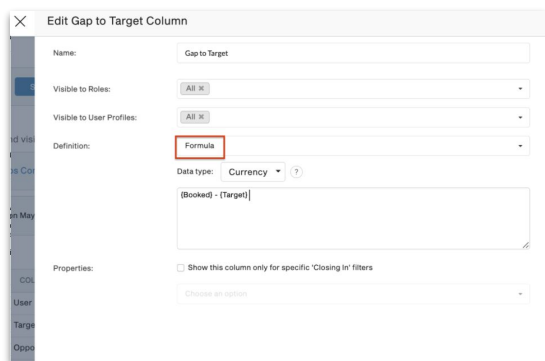
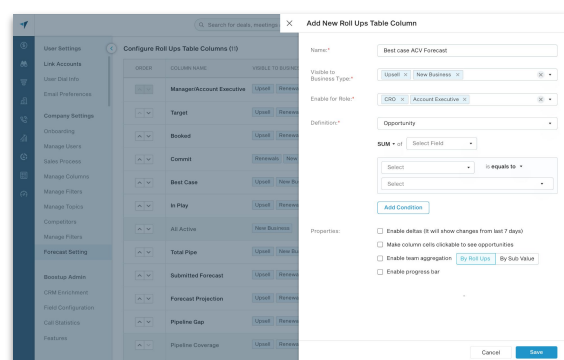
## Forecast Process Builder

Using the Forecast Configuration Builder in BoostUp, administrators can configure their forecast process, including modifying the forecast submission type, forecast period, business type and role.

## Forecast Roll-Ups Builder

Every organization wants the flexibility to customize their forecast roll-ups page to their unique requirements, whether it is by region, product, or manager. Additionally, you can define and add new custom columns to your roll-ups page.

Determine the persona who should submit the forecast, send forecast submission reminders and get visual indicators when forecasts submissions are past-due - all directly within BoostUp's UI.



## Custom Formulas and Metrics Builder

Create formulas columns that encompass as well as optimize the forecast workflow. Showcase filters that allow for easy sorting and drilling down of data. Easily incorporate specific formulas into your forecast process and preview your roll-up view directly within BoostUp's user interface.

## Custom Views and Layouts

BoostUp allows you to in-line update your layout, column order and preferences. Create custom views based on individual preferences—changes as made dynamically and instantly. Save your custom views or operations has the ability to create and enable certain views for the entire company or by role.

