BoostUp Self-Serve Admin Studio

Cut down implementation time by 50%.

BoostUp

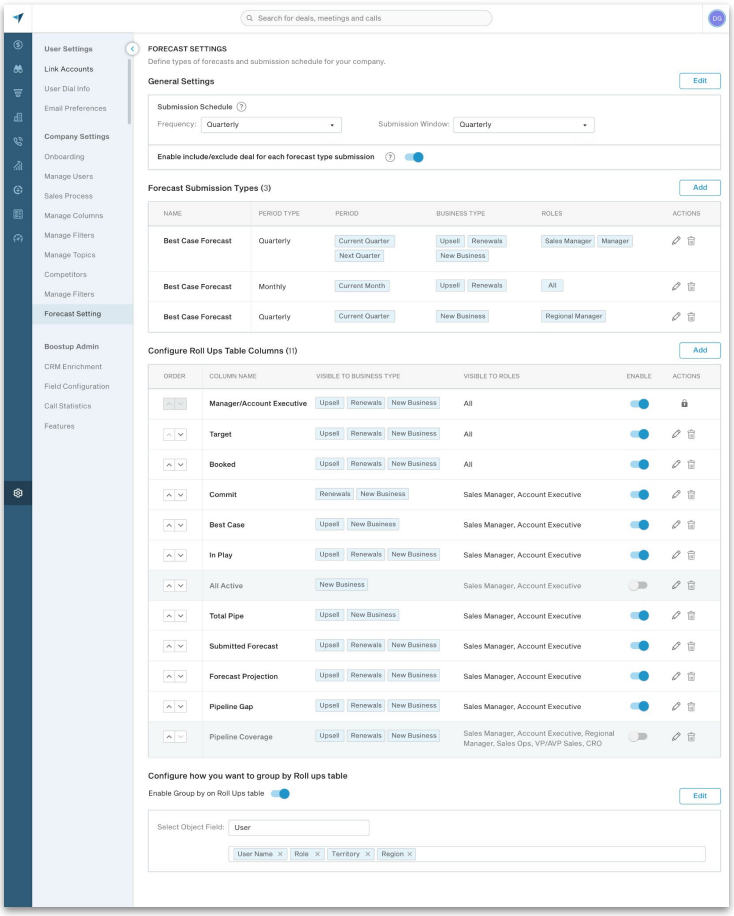
BoostUp puts the control in your hands and adapts to the way you run your business, forecasting and sales process.

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

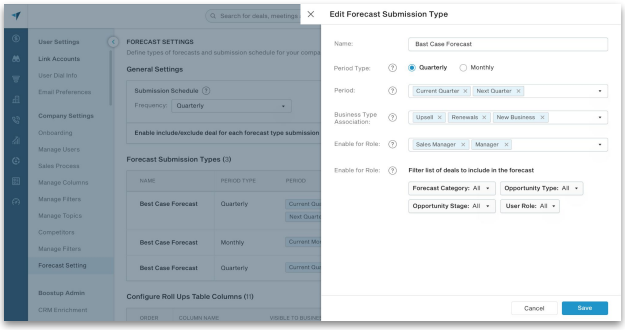
BoostUp gives you the flexibility to make adjustments to how you forecast. With a few clicks in BoostUp's self-serve environment, administrators can:

- 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

@2022 BoostUp.ai, All Rights Reserved. The BoostUp name and logo are trademarked.

"We found BoostUp to be the most comprehensive RevOps platform out there. It's 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



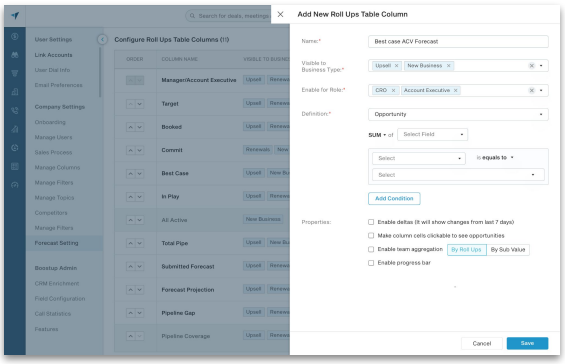
Forecast Process Builder

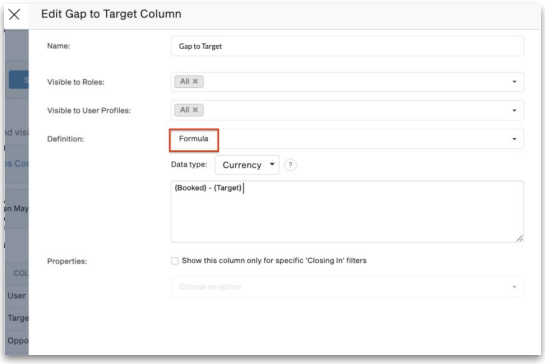
Using the Forecast Configuration Builder in BoostUp, administrators can configure their forecast process, including modifying the forecast submission type, forecast period, business type and role.

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.

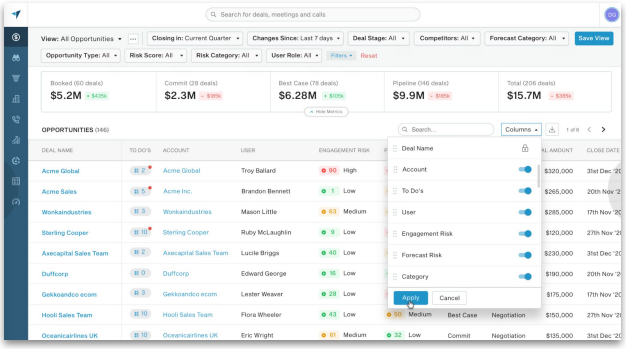
Determine the persona who should submit the forecast, send forecast submission reminders and get visual indicators when forecasts submissions are past-due - all directly within BoostUp's UI.





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.