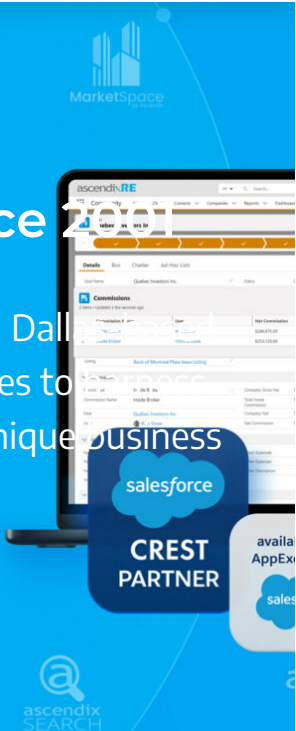




# Salesforce Consulting and CRM Tools Since 2001

Salesforce consulting, integration, and development services from a Dallas-based Salesforce CRM and AppExchange partner. We empower businesses to harness Salesforce's full potential and build custom apps that match their unique business workflows.

Book a Free Consulting Call



Salesforce  
**20+**  
years of expertise

## Innovate, Integrate, and Dominate with Ascendix



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Salesforce is an infinitely flexible platform, and Ascendix is here to take you beyond its standard functionalities. Our legacy spanning **two decades** in Salesforce consulting helped us learn all the ins and outs of its ecosystem, allowing us to provide the best workarounds and cost-effective strategies.

No matter where you are in your Salesforce journey – whether you’re thinking about changing from a basic CRM or trying to improve your current Salesforce setup – we’re here to help. We can give you advice, develop custom Salesforce apps, or re-platform your business entirely on Salesforce.

As a **Salesforce Crest Consulting and AppExchange Partner**, we’re not just in the top tier; we’re in the top echelon of the **top 15% of consultancies** across the world.

Thousands of happy users of our bespoke solutions: **AscendixRE CRM**, **Ascendix Search**, **Composer**, and **MarketSpace**, testify to our commitment to delivering tailored excellence.



## Our Salesforce Service Offerings

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## Salesforce Setup

Overcome technical and strategical challenges with Salesforce implementation and re-implementation.

[View All Services](#)

## Get a Zero-Cost Salesforce CRM Consultation

Full Name

Work Email

[Book a Call](#)

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## What We Can Build on Salesforce

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## Custom Portals

Revolutionize how your customers and partners interact with your business and create a digital center to monitor your distributors, resellers, suppliers, or investors' operations and their outcomes.

## Our Proven Expertise



## Our Core Competencies in Salesforce Clouds

01

### Sales Cloud

Optimize Salesforce Sales Cloud to align with your business specifics and achieve higher lead volumes and conversion rates, quicker closing of deals, and accelerated

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Enhance your marketing efficiency and harness sophisticated automation, analytics, and reporting using Marketing Cloud and MC Account Engagement (aka Pardot). Ensure a consistent influx of premium leads through landing pages, forms, and social integration.

[Learn More →](#)

03

## Experience Cloud

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Enhance customer engagement with a seamless and transparent user experience. Leveraging premier Salesforce-powered customer and partner portals, CMS tools, we'll customize designs ensuring attractive and accessible solutions and benefit your clients' autonomous service usage.

[Learn More →](#)

04

## Service Cloud

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Utilize a Salesforce Service Cloud for automation, ensuring exceptional client support and access to self-help resources. Allocate the most apt agents for customer queries, gather performance metrics and feedback for each support instance, and enhance first-contact issue resolution to boost client satisfaction.

[Learn More →](#)

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Maximize analytical capabilities with our expert setups in CRM Analytics (Einstein) & Tableau. Access precise data, craft insightful visual reports, and integrate both external and internal data for in-depth analysis.

06

## Nonprofit Cloud

Unify fundraising, programs, and outcomes in Salesforce Nonprofit Cloud. Utilize high-touch and mass-market fundraising, along with robust program management tools, to empower your team, foster collaboration, and measure impactful results.

## Hire a Dedicated Team of Salesforce Experts

Full Name

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Work Email

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[Book a Call](#)

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The banner features the Ascendix and Salesforce logos at the top left. A white box contains the hashtag #ClientTestimonial. The main title 'Innovative Capital Corporation' is in large white text. Below it, two circular portraits are shown: Revel Stark, Director of Business Development at ICC, and Wesley D. Snow, CEO & President of Ascendix.

Having a vast customer base, **Innovative Capital** was struggling with housing all the data of their lenders and borrowers. Moreover, the company was looking for a solution for robust marketing of their services and tools for lead processing and engagement. Ascendix helped Innovative Capital to cover all their needs.

*"In this journey, we're working hand in hand with Ascendix to alternately create strategies within the software to serve our loan officers and help them to increase their bandwidth so that they can take on more clients, do more loans and drive more revenue."*

*Ascendix team doesn't only build solutions for Innovative Capital but also provides Salesforce support continuously and finds answers within 24 hours."*

**Revel Stark, Director of Business Development at Innovative Capital Commercial**

## Industries We Specialize In

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## Commercial Real Estate

With two decades of expertise in Salesforce consulting for the [commercial real estate sector](#), we offer invaluable insights from our hard-learned lessons to optimize your Salesforce CRM or build a very custom solution like a listing portal powered by Salesforce.

Our team will customize your solution's user interface and enhance your user experience to align it with commercial real estate workflows and needs, ensuring Salesforce operates at its peak efficiency.

## Capital Markets

While Salesforce stands as a leading platform, its out-of-the-box features might not always align with your specific requirements. As a go-to Salesforce consulting partner, we specialize in customizing Salesforce to reflect and streamline your business operations.

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## Venture Capital

Your Venture Capital CRM should align with your business processes, not dictate them. As a Salesforce Crest Consulting Partner, Ascendix will maximize [Venture Capital success with Salesforce CRM](#) and enhance your system's efficacy.

We offer a comprehensive range of Salesforce services, including holistic system implementation, custom development, and user training on optimal utilization of Salesforce for venture capital.

**Private Equity**

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## Mortgage Banking

We will help your firm drive efficiency, reduce operational costs, and deliver personalized services via a customized or custom-built Salesforce solution. By engaging with Ascendix, your mortgage banking company can centralize client data, track loan applications in real-time, and approve loans faster.

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and potential risks, allowing for informed decision-making. We'll help you build custom portals enabling seamless communication with clients and partners essential for timely deal closures.

## Our Clients



## Ascendix's Products: Built on Salesforce



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## Powerful search and mass actions for Salesforce for \$15/user

Create call and marketing lists, mass edit your Salesforce records, add new events, log calls, create new tasks in bulk, mass email, use maps and charts to locate your Salesforce data, get insights, and more. Easy and productive!

[Learn More](#)



## AscendixRE CRM for Commercial Real Estate

**The only commercial real estate CRM available on top of Salesforce and Dynamics 365, from \$79/user.**

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## Composer Salesforce Report Writing Tool

### Commercial real estate content management software for \$25/user

Create branded real estate flyers, brochures, activity reports, microsites, custom collateral, and property tour books with a few clicks using the data and pictures from your CRM software.

[Learn More](#)

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## MarketSpace for AscendixRE

### A Property Listings Portal & Secure Deal Rooms

Bring your investors and tenants to secure Deal rooms where you can showcase available properties, share financials, get instant feedback, and close deals without unnecessary email chains.

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## AscendixRE for Capital Markets

### CRM for Commercial Mortgage Brokers and Capital Markets

Track capital sources, lenders, investors, deals, and all communication in one place. Personalize the experience of your clients and automate prospecting.

[Learn More](#)

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## Development Services by Ascendix Tech

Visit Ascendix Tech

01



CRM Consultancy with 20+ Years of Experience

Beyond technical prowess, we pride ourselves on our longstanding presence in the Salesforce and Microsoft Dynamics landscapes, domain expertise across 20+ industries, and our dedication to innovation.

CRM for Land Brokers from \$79/user

02

True CRM software designed and optimized solely for land brokers. Keep all land deals and relationships in one place.

### Global Service Delivery

[Learn More](#)

Empowered by 15 years in IT Outsourcing, our team of over 70 Salesforce-certified professionals, and Salesforce service delivery hubs spanning the US and Europe, our consulting and development proficiency stands out.

03

Flexible Engagement Models

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At Ascendix Tech, we offer three engagement models: **Managed Delivery** - We take complete responsibility for the entire project lifecycle; **Dedicated Team** - We fill an expertise gap in your team;

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04

## Service & Product Development Expertise

While many firms specialize exclusively in service provision or product development, we possess proficiency in both realms. We are long-established Salesforce and Microsoft Dynamics 365 consultants and creators of 17 software solutions, two of which are commercially successful apps on AppExchange.

05

## Commitment to Continuous Improvement

As a Salesforce Crest Consulting and AppExchange Partners, we proudly hold over 120 Salesforce Certifications and we are not going to stop on it. Our professionals are dedicated to consistently enhancing their expertise and aligning with the latest trends to provide premier Salesforce solutions.

## Resources

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## Salesforce Help Guides & Resources

Read tips & tricks on Salesforce implementation as well as technology trends overviews and expert insights on our blog.

## Contact Sales Team

First Name

Last Name

Work Email

Phone

How can we help you?

 Attach files

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 +1 972-889-8090

 Ascendix Corporate Office  
12222 Merit Drive Suite 1550  
Dallas, Texas 75251

Ascendix User? Need help? Send your support requests to [support@ascendix.com](mailto:support@ascendix.com)



## Services

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[CRM Consulting](#)

[Salesforce Services](#)

[Dynamics 365 Consulting](#)

[CRE Technology Consulting](#)

[Software Development](#) 

## Products

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[AscendixRE CRM](#)

[Ascendix Search](#)

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- [How We Work](#)
- [Salesforce Quickstart Packages](#)

## CRM Academy

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- [Commercial Real Estate CRMs](#)

## Contacts

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