



FRESHSALES

EXTENDED PROFILE



OVERVIEW

Freshsales is sales and customer service tech provider Freshworks' CRM offering. It integrates phone and email so that calls and emails can be sent directly from the platform, which allows sales teams to streamline prospect communications. Communication is also made more efficient by the email alerts, which tell you when an email is opened and when the customer has clicked on a link.

Freshsales offers strong analytics and reporting functionalities which offer insights on sales-ready buying signals and behaviors, so sales teams know when to act for the best outcomes. The analytics also show prospects' engagement level, context, and online behavior, to help make conversations with future customers relevant to their interests and needs.

As well instigate sales conversations, Freshworks helps to manage the sales pipeline more effectively. It tracks the progress of deals and gives your professionals chance to add tasks, set up meetings and contact the customer from their individual deal card.

Freshsales CRM comes in four packages: sprout, blossom, garden, and estate. The 'sprout' package is free, and users can scale up as their company needs. The most basic package offers basic reporting, built-in communications and iOS and Android app. The most advanced 'Estate' package offers a reports dashboard, advanced customization, rules-based lead scoring and segment integration.

All the Freshsales plans include 24/ 7 email support and 24 hours, 5 days a week phone support.

SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Freshsales
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✗
QUOTATION HANDLING	✗
	✓

TASK ASSIGNMENT	
TERRITORY/QUOTA MANAGEMENT	✓
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✗
SOCIAL RELATIONSHIP MANAGEMENT	✗
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✗
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✓
HOSTING METHOD	

CLOUD	✓
ON-PREMISE	✗
FURTHER INFORMATION	
PRICING	Free/\$12/\$25/\$49 per user/month
IMPLEMENTATION TIMEFRAME	2-3 weeks

SOFTWARE SCREENSHOTS












195 days free trial
UPGRADE
New





Contacts > James Sampleton
Add deal



\$ 7,800

1 open deal

\$ 8,000

1 won deal

James Sampleton   

CEO, Widgetz.io

San Diego, CA, USA





Owner	Rebecca Moris	Department	Engineering
Email	jamesampleton@gmail.com	Work	+(473) 160-8261
Mobile	+919940459565	Status	Qualified Lead
Has authority	No	Do not disturb	No
Time zone	(GMT-08:00) Pacific Time (US & Canada)	Address	134 Baker St
Zipcode	92093	Source	Organic Search

View and edit all fields

NOTES
TASKS
APPOINTMENTS
FILES

Start typing...

Had a call with James. Requested the proposal document and pricing quote asap.

mohammeda
a year ago

RECENT CONVERSATIONS
View all (26)



Rebecca Moris <beckiemoris@gm...>
3 months ago

Need a Demo?

Hi James, We are glad that you've signed up for CapInvoice. Hope you are happy with the product. You can sign up for an demo if you want to. [Click here](#)

⋮



James Sampleton
4 months ago for 43s

From:  Rebecca Moris via Rebecca Moris

To:  +919940459565

▶

0:00

01:33

⋮



James Sampleton
4 months ago for 15s

From:  Rebecca Moris via Rebecca Moris

To:  +(473)-160-8261

⋮

RECENT ACTIVITIES
View all

Search by Lead, Contact, Account, Deal

Lead

Deals

My Deals

Sort deals by: Value

New	Under Review	Demo	Won	Lost
<p>\$21,000 - 4 deals</p> <ul style="list-style-type: none"> Annual Subscription Renewal - \$12,000 Silver Account Signup - \$1,500 Basic Account Signup - \$5,400 Gold Account Signup - \$1,200 Annual Subscription Renewal - \$1,900 Subscription Upgrade to G... - \$600 	<p>\$23,800 - 4 deals</p> <ul style="list-style-type: none"> Subscription Upgrade to S... - \$1,800 Gold Account Signup - \$6,000 Subscription Upgrade to G... - \$1,500 Basic Account Signup - \$1,500 	<p>\$14,000 - 3 deals</p> <ul style="list-style-type: none"> Silver Account Signup - \$1,000 Gold Account Signup - \$1,500 Annual Subscription Renewal - \$11,500 	<p>\$15,700 - 2 deals</p> <ul style="list-style-type: none"> Basic Account Signup - \$1,500 Subscription Upgrade to G... - \$14,200 	<p>\$4,664 - 3 deals</p> <ul style="list-style-type: none"> Start - \$1.3 End - \$1.24 Deal - \$50 Deal - \$50 Deal - \$50

MANAGE Deal pipeline

Search by Lead, Contact, Account, Deal

Lead

Leads

My Leads

Sort leads by: Lead score

NAME	LEAD SCORE	STAGE	LAST CONTACTED
James Sampson VP Finance Wagtail	93	Contacted	03 Today at 1:50 AM
Blair Meist Finance Director Belinger Mach Inc	85	Interested	Today at 7:40 AM
Kathryn Bonakum HR manager Sava Library	79	Demo	03 Yesterday at 11:21 PM
Luiz Broccoli Regional Manager Wynn, Mary Ellen Eng	69	Contacted	03 Today at 7:40 AM
Mario Jac Account Manager Sales Y OS Inc	64	Contacted	03 Yesterday at 12:39 PM
Tatiana Vogel Account Manager Sales Wagtail, Duke Jr	59	Demo	Yesterday at 10:12 PM
Melina Orizabal Business Development Manager Sea Front	53	Contacted	03 Today at 8:20 AM
Wagner Street Service Vice President of Sales Wagner Street Service	47	Contacted	03 Yesterday at 10:13 PM

CONTEXT

MANAGE

Search by Lead, Contact, Account, Deal

Lead

Leads

*My Leads

Sort leads by: Lead score

NAME	LEAD SCORE	STAGE	LAST CONTACTED
Tatiana Vogel Account Manager Sales Wagtail, Duke Jr	59	Demo	Yesterday at 10:12 PM
Trevor Moreno General Manager Wagtail Acute Town Corporation	59	Demo	Yesterday at 10:10 PM
Stephen Alexander Manager Wagtail Acute Town Corporation	53	Contacted	03 Today at 8:20 AM
Melina Orizabal Business Development Manager Shearson Inn Sea Front	53	Contacted	03 Today at 8:20 AM
Ben Mijangos Vice President of Sales Wagner Travel Service	47	Contacted	03 Yesterday at 10:13 PM
Lara Housh Sales Trainer York Services Jewel Line	40	Contacted	03 Today at 8:41 AM

MANAGE Lead Score

Search by Lead, Contact, Account, Deal

Lead

My Appointments & Tasks

MANAGE

View in time zone: GMT-05:30 Central

APPOINTMENTS	DATE	TIME	TITLE	ASSIGNED TO
21	14:30 - 15:00	Demo of Captrivice	Requested by: James Sampson	
	16:30 - 17:30	Meet Blair	Requested by: Blair Meist	
22	12:30 - 1:30	Demo of Captrivice	Requested by: Duke Bonach	
	14:30 - 15:30	Meet Jane to evaluate Captrivice usage	Requested by: Jane Sampson	
23	14:30 - 15:30	Demo of Captrivice to Eric	Requested by: Erik Frensch	

Showing Appointments for 23 Jun 2016

MANAGE Google Calendar Integration