



HAYSTACKCRM

EXTENDED PROFILE

OVERVIEW

HaystackCRM developed a mobile app for our CRM that is full featured and interactive with a simple, clean look. Our goal is to reduce the workload of a sales team by providing a platform to enter data in the moment, quickly and easily. We set up HaystackCRM to focus on customer relationships instead of only a pipeline view. The contact overview has the information that you can see in a glance, including what open opportunities or appointments are coming up. You can add multiple opportunities or deals to a contact, including: quotes, building your relationship with the prospects, leads or customer, not tracking single deals. Another advantage of our mobile platform is offering features like mapping, not typically found in a CRM.

SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	HaystackCRM
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	X
FURTHER INFORMATION	
PRICING	\$29 per user per month
PRICING	Free for single user (limit of 2500 records)
IMPLEMENTATION TIMEFRAME	1 day

SOFTWARE SCREENSHOTS

Hello, Virginia
Upgrade My Plan

Search HaystackCRM

HAYSTACKCRM
Building Connections. Anywhere. Anytime.

[Connections](#)
[Opportunities](#)
[Tasks](#)
[Events](#)
[Calendar](#)
[Create](#)
⚙

Opportunities
View

Open Won Lost

🎯
\$107,000.00

\$101,000.00	<div style="background-color: #c0392b; height: 10px; width: 95%;"></div>
\$6,000.00	<div style="background-color: #f1c40f; height: 10px; width: 5%;"></div>
\$0.00	<div style="background-color: #95a5a6; height: 10px; width: 0%;"></div>

Tasks
View

Send Final Version Of Proposal	<input type="checkbox"/>
Call For Quote Finalisation	<input type="checkbox"/>
Call Catherine for budget approval	<input type="checkbox"/>
Call For Quote Approval	<input type="checkbox"/>

Events
View

Lunch And Learn	4-05-2018 12:00 pm
Phone call	4-05-2018 1:00 pm
Demo of HaystackCRM	4-09-2018 3:00 pm
Kickoff	4-11-2018 11:00 am

Activity
View

event **Lunch And Learn**

Event End Date: 5 Apr 2018

Changed by Virginia Lewis on 3 Apr 2018 11:54 am

event **Lunch And Learn**

Event End Date: 5 Apr 2018

Changed by Virginia Lewis on 3 Apr 2018 11:54 am

12:00

Search

Blair Blanchard
Superhero Consultant at Rhyta

925-265-3324
blair.blanchard@rhyta.com

Overview Details Tasks (0)

Open Opportunities
\$22,000.00
\$22,000.00 - Kickstart Website Development

Upcoming Events
Kickoff Meeting - Mon, 16 Apr at 10:00 AM

Work: Rhyta
4407 Thunder Rd
Rancho Mirage CA 92270

11:56

Near Patricia Harrison

My Connections Prospects

25 Miles	60 Miles	75 Miles	100 Miles
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Contacts (9)

- Patricia Harrison**
6.00 mi.
CEO
Magna Solution
- Mildred White**
14.72 mi.
Reservation and transportation ticket agent
- Susie Smiley**
17.10 mi.
VP of Sales
Big Bang Marketing

11:55

Search

Upcoming Events

- Lunch And Learn**
Thu, 05 Apr at 12:00 PM to 01:00 PM
- Phone call**
Thu, 05 Apr at 1:00 PM to 02:00 PM

Uncompleted Tasks

- Send Final Version Of Proposal**
Wed, 28 Mar 2018
- Call For Quote Finalisation**
Tue, 24 Apr 2018
- Call Catherine for budget approval**
Mon, 14 May 2018