



CLARITYSOFT CRM

EXTENDED PROFILE



OVERVIEW

Claritysoft CRM is an all-in-one CRM platform for sales, marketing, and customer service. Our unique blend of flexibility and functionality lets you custom fit our powerful feature set into exact-fit screens to meet the needs of every user type in your organization. Designed for usability, Claritysoft CRM delivers the right amount of functionality in a clean and easy to use interface.

With Claritysoft CRM you get world-class integration capabilities with an open API plus out-of-the-box Outlook, Gmail, and Zapier integration. You also get valuable insight through extensive dashboard and reporting capabilities.

An exceptional value, Claritysoft delivers a powerful feature set that's built to eliminate complexity and drive performance.



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Claritysoft CRM
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	From \$39.00 per user per month, billed annually.
IMPLEMENTATION TIMEFRAME	Average implementation time of 2 weeks

SOFTWARE SCREENSHOTS

claritysoft

Home

Leads

Accounts

Contacts

Opportunities

Quotations

Sales

Activities

Calendar

Dashboards

Marketing

Show More...

← Contacts
Steve Schade ▾
⌵
⚙️
?

Mark Jones

5M Systems | New York

Description

Details
Open Activities
Closed Activities
Notes
Attachments
Opportunities
Quotations
More...

Sync With Outlook

Account	5M Systems	Address1		Owner	Billy Jones ▾
Contact	Mark Jones	City	New York	Lead Sources	Cold Call ▾
Title	CEO	State		Sector	Industrial ▾
Email	claritycrm@gmail.com	Zip Code		Last Touch Date	06-03-2017 02:22 PM
Phone	614-222-3333 <input type="text" value="Ext"/>	Country		Last Edit Date	08-06-2017 02:06 PM
Mobile	614-333-2222	Status	Partner ▾	Creation Date	11-02-2015 12:12 PM

✕ Cancel
💾 Save
💾 Save & New
💾 Save & Close



The smartphone screen displays a 'Leads' list interface. At the top, there is a search bar and a '+ New' button. The list contains several lead entries, each with a title, contact information, and a status indicator.

Lead Title	Contact	Status
A Grape Time Winery: W...	Stella Rose stella.rose75@gmail.com	Evaluation New
Adler Office Supplies: Ve...	Camron Jones cam@adlerofficesupplies.com	Evaluation New
Asterisk Factory: Trade ...	Bill Miller bill@asteriskfactory.com	Exhausted New
Beta Planet: Social Media	Kathryn Akeledge kathryn@betaplanet.com	Awareness New
Blois: Pay-Per-Click	Russell Hill russell@blois.com	Quality New
Bishop Storage: Campaign	Mavis Brock mavis@bishopstorage.com	Quality New
Bleumenthols: Other		Exhausted