



INTELLISALES CRM

EXTENDED PROFILE



OVERVIEW

IntelliSales CRM is designed to help improve sales processes.

SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	IntelliSales 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	✗
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
MOBILE FEATURES	
IOS APP	✗
ANDROID APP	✗
NATIVE WEB APP	✓
HOSTING METHOD	
CLOUD	✓
ON-PREMISE	✓
FURTHER INFORMATION	
PRICING	From free* then \$8.95 per user/month
IMPLEMENTATION TIMEFRAME	Immediate

SOFTWARE SCREENSHOTS

The screenshot displays the INTELLISALESCRM web application interface. At the top, there is a navigation bar with the logo and utility icons for Mail, Call, Settings, and Logout. Below this is a main menu with tabs for HOME, LEADS, CONTACTS, OPPORTUNITIES (which is currently selected), COMPANIES, CALENDAR, and REPORTS.

The main content area shows a sales pipeline with stages: Qualified (132 Days), Interested (0 Days), Proposal (0 Days), and Negotiation (0 Days). A progress bar indicates a 25% completion rate. Above the pipeline, there are filters for '0130', '\$ 0', and '01/31/2019', along with status buttons for WON, LOST, and STALLED.

On the left side, there is a sidebar menu with expandable sections for Company, Contacts, Owner, Overview, Description, and Tag.

The central focus is the 'Schedule Activity' form. It includes a calendar for April 2019 with the 30th highlighted. The form has fields for 'Select Type', 'Subject', and 'Details'. At the bottom, there are time pickers for 'Start Time' (08:00 AM) and 'End Time' (08:30 AM).

INTELLISALESCRM

HOME LEADS CONTRACTS OPPORTUNITIES COMPANIES CALENDAR REPORTS

Mail Call Settings Logout

Call ID: 0192332919

Lead Three
 Site: [input]
 Department: [input]
 Email: leadthree@company.com

Notes 1: [input]
 Notes 2: [input]

Revenue Achieved: \$0
 Opportunity Won: 0
 Pipeline Revenue: \$0
 Open Opportunities: 0

Opportunities

Company

Similar Contacts

Schedule Activity

April 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	01	02	03	04	05	06
07	08	09	10	11	12	13

Notes

INTELLISALESCRM

HOME LEADS CONTRACTS OPPORTUNITIES COMPANIES CALENDAR REPORTS

Mail Call Settings Logout

2019-01-01 - 2019-12-31

Activities Created

Activities Completed

Opportunities Created

Opportunities by Stages

Closed Opportunities

Call Dispositions

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INTELLISALESCRM

HOME LEADS CONTRACTS OPPORTUNITIES COMPANIES CALENDAR REPORTS

Mail Call Settings Logout

2019-04-30 - 2019-04-30

Today's Tasks

Meetings	0 / 0 Attended
Calls	0 / 0 Completed
Emails	0 / 0 Sent
Proposals	0 / 0 Shared

Opportunities Closing This Month

Opportunity Name	Amount
Home Mail opp	\$0

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HOME LEADS CONTRACTS OPPORTUNITIES COMPANIES CALENDAR REPORTS

Mail Call Settings Logout

Joe Horner
 Net Engineer
 joe.horner@intellisense.com

Revenue Achieved: \$0
 Opportunities Won: 0
 Pipeline Revenue: \$0
 Open Opportunities: 1

Opportunities

Company

Similar Contacts

Overview

Description

Tag

Schedule Activity

April 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	01	02	03	04	05	06

Notes