



AMOCRM

EXTENDED PROFILE



OVERVIEW

amoCRM is a web-hosted CRM aimed at enterprises of all sizes. The CRM is marketed as lead and sales management app, the software allows sales and marketing teams to track a lead from the first contact through to sales completion.

amoCRM automates most of the work of managing the sales funnel. Features to help with automation include sales reports, business card scanning and two-way email sync. These features help users keep track of all contacts and leads, ensuring that no sales are lost due to inefficiencies or lead mishandling. amoCRM also includes the option to make calls through its web-based app.

amoCRM is cloud-based and can be accessed via native Android and iOS apps, technical support is also provided at all levels of plan. The platform is available in three different pricing packages, depending on user requirements and the number of functionalities needed.

amoCRM comes with a range of additional services, some of which include file storage and remote access. amoCRM's intuitive design aims to require no extensive training or manuals.



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	amoCRM
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	
	Data currently unavailable. Click here to suggest data for this product
HOSTING METHOD	
CLOUD	✓

ON-PREMISE	X
FURTHER INFORMATION	
PRICING	From \$15 per user/month
IMPLEMENTATION TIMEFRAME	1 Day

SOFTWARE SCREENSHOTS

Corporate Training

training
topic: culture

Sales Pipeline

Negotiating

Main
Details
Statistics

Resp. user	Daniel
Sale	7,800 \$
Project type	Group training
Topic	Doing business in China
Group size	7
Length	5 days
Start date	02/20/2017
Certification	<input checked="" type="radio"/> Yes <input type="radio"/> No

Steve Blackburn ...

Company: [London Corp](#)

Work email: SteveB@londoncorp.com

Position: **Managing Director**

[more](#)

+ Add contact

Dashboard
Leads
Customers
Calendar
Lists
Mail
Stats
Settings

01/04/2017 9:54 AM Daniel

Primary concern: they are opening a branch in China - hiring Chinese employees and sending their own managers

01/03/2017 9:52 AM From: Jacqueline, to: Daniel

Hey Dan, this request for a China course just came in, and I wanted to pass it to you.

01/03/2017 9:54 AM for Daniel

Follow-up: Send intro questionnaire
Sent

01/03/2017 11:05 AM From: Daniel, to: Steve

Call about a training
Good afternoon, ...

01/03/2017 11:05 AM Daniel New status: Course Pipeline Considering from Initial Contact

01/04/2017

01/04/2017 9:19 AM for Daniel

Call
Decided to book a group training w/ certification. Call next week to finalize.

01/04/2017 9:20 AM Daniel New status: Course Pipeline Negotiating from Considering

Today for Daniel

Call

Complete to-do

Call
 tomorrow
next week
date

Participants: 3

Note: type here

SALES PIPELINE | 1 filter applied Search and filter 19 leads: \$135,600 X + NEW LEAD

Days for setup: 9 Without on-site: 4 Over-site: 1 New today / yesterday: 0 / 0 Response date: 20 leads: \$147,490

FIRST CONTACT	CONSIDERING	NEGOTIATING	PENDING DEAL
<ul style="list-style-type: none"> Management Unleashed Artific \$10K [training] 12/19/2016 Arthur Spencer 12/19/2016 College training workshop \$1,000 [course] [workshop] [topic: culture] 12/19/2016 Leadership Corporate Training \$1,000 [course] [workshop] [topic: culture] 12/19/2016 Electric Gamer Co. Management workshop \$10,000 [course] [workshop] [topic: culture] 12/19/2016 Arnold Long Cultural Coaching \$1,000 [course] [workshop] [topic: culture] 12/19/2016 Area Plus Speaking engagement 12/07/2016 Steve Blackman, London Corp Corporate Training \$200K [training] [topic: management] 12/07/2016 	<ul style="list-style-type: none"> Dean Smith Speaking engagement \$1,000 [speaking] [topic: management] 12/19/2016 Sara Chang Interactive Culture workshop \$10,000 [course] [workshop] [topic: culture] 12/19/2016 Arnold Culer Speaking engagement - conference \$10,000 [conf] 12/19/2016 HR Leaders Manager's Bootcamp \$20,000 [course] [workshop] [topic: management] 12/19/2016 Jan Sanchez Management Coaching \$1,500 [conf] [individual] [topic: management] 12/07/2016 Albin Gold Speaking engagement - conference \$10,000 [speaking] [conference] 12/07/2016 	<ul style="list-style-type: none"> Don Oshlan Training \$1,000 [individual] [topic: management] 12/19/2016 Women in Business Conference Special Guest - speaker \$2,000 [speaking] [conference] 12/19/2016 Ben Barnes Management coaching \$1,000 [course] [workshop] [topic: management] 12/07/2016 	<ul style="list-style-type: none"> Andra Hoare College Key Note \$10,000 [course] [speaking] 12/19/2016 The Free Water Project Speaking engagement - Charity Gala \$1,000 [course] 12/19/2016 Ronald Schuler, Vira Protections Inc Speaking engagement - Key Note \$10,000 [speaking] [topic: sales] 12/07/2016

SALES PIPELINE Cancel Save

Source of auto lead creation

Automatic actions for all leads

WEB FORM: Post a contact form on your website and generate leads from it. **FORM ID: 15675008** with visible text: **Call now** **Fill out form** **Fill out form** **Fill out form**

PHONE: Integrate PEX, keep track of the calls, get reports. **Twilio**

CHATS: Chat online, the transcript will be saved in cards. **Telegram**

MAIL: Integrate your email and get leads from email. **jet@petermattar.com**

CONSIDERING: **Follow up call** **Send email, form, questionnaire, quiz**

NEGOTIATING: **Start a proposal** **Schedule meeting**

Add a new scenario for leads with a particular tag

Create the conditions for the automatic progression of lead to this status

CUSTOMERS | Search and filter 19 customers: \$25,658 + NEW CUSTOMER

RECENTLY PURCHASED	90 DAYS BEFORE PURCHASE	30 DAYS BEFORE	7 DAYS BEFORE
<ul style="list-style-type: none"> Derek Little Owen van Camp Meet purchase: 02/18 \$400 [design] [website] [CRM] [Partner] [1] Ben Fox Ryan Welch Meet purchase: 12/19 \$1,000 [design] [website] [development] [1] Alexandra Baker Meet purchase: 02/08/2018 \$400 [design] [website] [website] [CRM] [1] Charles Nguyen Meet purchase: 02/08/2018 \$400 [development] [partnership] [today] Emily Johnson Meet purchase: 02/08/2018 \$6,000 [data] [analytics] [integration] [1] Shirice Brown Meet purchase: 02/08/2018 \$2,200 [website] [CRM] [development] [today] Henry Rater Steve Pratt Meet purchase: 12/11 \$410 [design] [data] [CRM] [Partner] [1] 	<ul style="list-style-type: none"> Kim Swanson, Speed Mechanics Howard Burton Meet purchase: 02/09 \$2,000 [integration] [CRM] [Design] [1] Kathleen, New Dimensions Daniel Scully Meet purchase: 02/09 \$100 [website] [data] [integration] [CRM] [1] James Houston, Univer Meet purchase: 02/09 \$300 [design] [CRM] [development] [attention] [1] Stacy Kovacs, Henry A. Co Mary Stewart Meet purchase: 02/09 \$400 [data] [analytics] [integration] [1] Kathleen Mc Coy Meet purchase: 02/09 \$410 [audit] [1] 	<ul style="list-style-type: none"> John Demko, AT&T.com Jacob Golden Meet purchase: 02/09 \$400 [website] [data] [integration] [Design] [1] Gregory Holman, Uniqur Eileen Adams Meet purchase: 02/10 \$340 [data] [CRM] [Design] [Development] [1] Ronald Waring, Toy Store Kimberly Weston Meet purchase: 02/10 \$1,000 [design] [website] [CRM] [1] Allen Howard Stacy Adams Meet purchase: 02/10 \$4,000 [design] [CRM] [development] [1] Morgan Schmidt Meet purchase: 02/08 \$410 [design] [website] [CRM] [analytics] [1] 	<ul style="list-style-type: none"> Alex Howard John Snow Meet purchase: 02/05 \$410 [data] [CRM] [Partner] [integration] [1] Benjamin Long Meet purchase: 02/11 \$1,000 [website] [integration] [CRM] [today]

Analytics | Filter > Win-Lost Analysis

Win-Lost Analysis 8 days 158 Form Email Tot Incoming requests

Average time of processing a request 123 converted into leads

Pipeline Course Pipeline

By suite By amount

Day	Initial Contact	Negotiation	Offer made	Contract Negotiation	Closed - won	Closed - lost
0d.	90%					
2d.		33%				
1d.			25%			
1d.				25%		
12d.					25%	
						75%

12d. Avg. lead life-cycle