



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

+

Search by Lead, Contact, Account, Deal

195 days free trial [UPGRADE](#) [New](#)

Contacts > James Sampleton Add deal



\$ 7,800
1 open deal

\$ 8,000
1 won deal

James Sampleton Facebook Twitter LinkedIn

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 8 years 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

Leads > 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 Renew... \$12,000 - 1 deal Silver Account Signup \$1,500 - 1 deal Basic Account Signup \$5,400 - 1 deal Gold Account Signup \$1,200 - 1 deal Annual Subscription Renew... \$1,900 - 1 deal Subscription Upgrade to G... \$500 - 1 deal 	<p>\$23,800 - 4 deals</p> <ul style="list-style-type: none"> Subscription Upgrade to S... \$1,800 - 1 deal Gold Account Signup \$6,000 - 1 deal Subscription Upgrade to G... \$1,500 - 1 deal Basic Account Signup \$1,500 - 1 deal 	<p>\$14,000 - 3 deals</p> <ul style="list-style-type: none"> Silver Account Signup \$1,000 - 1 deal Gold Account Signup \$1,500 - 1 deal Annual Subscription Renew... \$11,500 - 1 deal 	<p>\$15,700 - 2 deals</p> <ul style="list-style-type: none"> Basic Account Signup \$1,500 - 1 deal Subscription Upgrade to G... \$14,200 - 1 deal 	<p>\$4,664 - 3 deals</p> <ul style="list-style-type: none"> Start \$1,24 End \$1,24 Deal \$1,24

MANAGE Deal pipeline

Search by Lead, Contact, Account, Deal

Leads > My Leads

Sort leads by: Lead score

NAME	LEAD SCORE	STAGE	LAST CONTACTED
James Samperton VP Finance Wargate	93	Contacted	03 Today at 1:50 AM
Blair Meist Finance Director Bolinger 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 Relationship Manager Wynn, Mary Ellen Eng	69	Contacted	03 Today at 7:40 AM
Mario Jac Account Manager Sales Y GS Inc	64	Contacted	03 Yesterday at 12:39 PM
Tamasha Vogel Account Manager Sales Wargate, Duke Jr	59	Demo	Yesterday at 10:12 PM
Melina Orizabal Business Development Manager Sava Point	53	Contacted	03 Today at 8:20 AM
Wynne Wynn Vice President of Sales Wynn, Fred Service	47	Contacted	03 Yesterday at 10:13 PM

CONTEXT

Search by Lead, Contact, Account, Deal

Leads > My Leads

Sort leads by: Lead score

NAME	LEAD SCORE	STAGE	LAST CONTACTED
Tamasha Vogel Account Manager Sales Wargate, Duke Jr	59	Demo	Yesterday at 10:12 PM
Trevor Moreno General Manager Wargate Accts Town Corporation	59	Demo	Yesterday at 10:10 PM
Stephen Alexander Manager Wargate Accts Town Corporation	53	Contacted	03 Today at 8:20 AM
Melina Orizabal Business Development Manager Sava Point	53	Contacted	03 Today at 8:20 AM
Ben Mijangos Vice President of Sales Wynn, Fred 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

My Appointments & Tasks

APPOINTMENTS

DATE	TIME	TITLE	ASSIGNED TO
21	14:30 - 15:00	Demo of Captrivice	James Samperton
	16:30 - 17:30	Meet Blair	Blair Meist
22	12:30 - 1:30	Demo of Captrivice	Dave Bennett
	14:30 - 15:30	Meet Jane to evaluate Captrivice usage	Jane Samperton
23	14:30 - 15:30	Demo of Captrivice to Eric	Eric Fawcett

Showing Appointments for 23 Jun 2016

MANAGE Google Calendar Integration