



BuddyCRM Feature List

Feature	Standard	Platinum
Record, track and manage activities with customers and prospects in one central, easy to use feed	X	X
Sync sent and received emails, with attachments, from any e-mail platform including mobile	X	X
Lead tracking and management	X	X
iPhone Application	X	X
Attach documents to company record cards	X	X
Proactive account management tools that help remind you if your forget to contact a prospect or customer	X	X
Customisable sales process	X	X
Opportunity tracking and management	X	X
Customisable dashboards	X	X
Reports	X	X
Case management	X	X
Campaigns	X	X
Quotes	X	X
Product database with image and document storage	X	X
Role permissions (including team and user view and view and edit capability)	X	X
Link to Pure360 and Mailchimp for email marketing <ul style="list-style-type: none"> - Transmit Full data list automatically, nightly - Send custom lists on demand - View Open and Click details within customer record 	X	X
Team management	X	X
Dedicated Manager Module for tracking sales team activity levels and highlighting trends	X	X
Dropbox integration	Coming Soon	Coming Soon
Our Awesome e-mail support	X	X
Online training session for system administrator for 1 hour	X	
Full On-boarding process where our skilled team guide you step by step to customise BuddyCRM to your company and document your sales process (helping ensure all team member are using the system consistently)	X	X
Our Awesome phone support (9am-5pm UK M-F)	X	X
Dedicated Account Manager	X	X
Unlimited online training	X	X
Custom Modifications available at discounted professional services rates	X	X
“Private” API to link to other Applications	X	X



Feature	Standard	Platinum
Fully outsourced management of CRM Software implementation. This additional package means you can let our support team take care of all day to day management of the implementation including: <ul style="list-style-type: none">• First line support and training for all users, however small the query• Perform system customisations as requested (within system functionality)• Proactive monitoring of Data Integrity• Regular updates provided to system administrator of user activity and ideas of efficiency gains• CSV import of new data and any updated data as required		X
Price (per user, per month)	£35	£53

All subscriptions offer a 30-day free trial and are then billed annually.

Prices available in alternate currency on request

Full subscription Terms and Conditions are available on our website at <http://support.buddycrm.com/wp-content/uploads/2014/05/General-Web-BuddyCRM-Terms-and-Conditions.pdf>

October 2015