



# PACKED WITH FEATURES

BuddyCRM features  
and add ons

**Buddy**<sup>CRM</sup>  
sales • support • marketing

# Features

Capabilities	PROFESSIONAL	ELITE	ELITE +
Accounts, Contacts, Leads, Opportunity Management	✓	✓	✓
Email Integration with Gmail and Outlook	✓	✓	✓
Mobile App	✓	✓	✓
Email Templates	✓	✓	✓
Templated Activities	✓	✓	✓
Activity Reminders	✓	✓	✓
Calendar Invites	✓	✓	✓
Custom Fields	✓	✓	✓
Real-time Sales Insights	✓	✓	✓
Business Intelligence	✓	✓	✓
Forecasting	✓	✓	✓
Campaign Management	✓	✓	✓
Workflows	✓	✓	✓
<b>Integration</b>			
ERP systems	✓	✓	✓
Accounting inc. Xero and Sage	✓	✓	✓
<b>Sell More</b>			
Sales Pipeline	✓	✓	✓
Quotations		✓	✓
<b>Enhanced Information and Control</b>			
Reports module with auto-scheduler		✓	✓
Calendar management		✓	✓
User permissions/Restrictions management		✓	✓
Manager KPI Module		✓	✓
<b>Marketing</b>			
HTML E-mail marketing		✓	✓
Personalisation		✓	✓
Enhanced sending		✓	✓
Lead nurturing through email campaigns		✓	✓

Capabilities	PROFESSIONAL	ELITE	ELITE +
Web to Lead		✓	✓
Signup Forms		✓	✓
Landing Pages		✓	✓
Automations		✓	✓
Text Messaging Services		✓	✓
<b>Cases</b>			
Case management		✓	✓
Case Email Integration		✓	✓
Case Workflows		✓	✓
Case Templates		✓	✓
<b>Connections</b>			
Google Maps		✓	✓
Webservice API		✓	✓
Zapier Integration		✓	✓
<b>White Glove Service</b>			
CRM Amends handled by our team			✓
Annual Rescoping			✓
2 x Free 4-hour Training Refresher per Annum			✓
Report Building Service			✓
Enhanced Service Level Agreement			✓
2 x Professional Service Days for Custom Development			✓

### All Plans Include

- Free Onboarding and Configuration.
- Free 4-hour interactive scoping session including documentation of system customisation and configuration of workflows/automations).
- Free implementation of all customisation and configuration identified in scoping session.
- Free Data Upload (fair usage based to 10,000 records in BuddyCRM upload template).
- Free Training (2x 4hr interactive training session).
- Free Unlimited access (9am-5pm) to our Customer Success team for support and also guidance on suggestions/best practice.
- Fair usage limits apply on email marketing, text messaging sending and google maps lookups.

**All plans are based on an annual payment.**

**Minimum 5 users.**

Full subscription [Terms and Conditions](#) are available on our website.