



SBSG Integrated Solutions CRM

- Custom Modules
- Lead, Organization, Contact & Opportunity Management
- Unlimited Custom Fields
- SMS Automation
- Lead Management: Scrubbing, Mapping & Uploading
- Workflow design, creation & management
- Automation design, creation & management
- Email Template design, creation & management
- Email Tracking & Reporting
- Daily Data Backup to hard drive, Server or Both
- Personal Privacy Compliant
- 30 million+ Organizations with 1 Contact person
- 32 Million Organization with Annual Revenue \$1 million/year+
- 58 million Organizations with Industry Category
- Lead Analytics
- Electronic Signatures for Proposals & Contracts (employee & Client)
- Document storage
- Sales Funnels
- “Expected Close Date” field in Opportunity
- Sales Pipeline creation, tracking & Reporting
- Customized Automated Reports
- CRM Click-to-Dial with softphone
- Direct Phone Numbers and personal extensions
- Includes unlimited inbound/outbound calls in Canada & USA
- Custom Interactive Voice Response (IVR) and call handling
- Custom Queue Recordings, Hold Music & Queue Interrupts
- Call Logs
- Call Recording
- Call Reports Including result, total, average talk time, longest, etc.
- Call tracking per Organization or Contact Record

Optional Integrations

- Calendly or equivalent
- Electronic Payments
- SBSG Mailer, Constant Contact or MailChimp
- SBSG Autodialer

\$39/month + tax/ User

One time setup fee \$49