CRM Service Providers

TresVista

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About TresVista Financial Services

- High-end customized financial services and knowledge outsourcing provider
- Includes financial modeling, valuation analysis, portfolio management services, research, & analytics

- Global footprint, with clients across the US, Europe, Asia, and MENA region
- Offices in Mumbai, India and London, United Kingdom

- For Private Equity Funds, Asset Managers, Research Firms, Investment Banks, and Corporates
- By talented Associates & Analysts; managed by experienced Vice Presidents/Assistant Vice President

- Flexible staffing structure based on client requirements
- Project based assignments
- Annual contract option partners clients with dedicated resources
- Virtual Captive for clients requiring a large dedicated team

- Deliver best-in-class quality and financial expertise
- Enable clients to focus on their core competencies
- Enable cost savings

Popular CRM Service Providers

Popular CRM Service Providers
Summary

CRM Provider	Price[1]	User Rating (Out of 5)	Strengths[2]	Weaknesses[2]
DealCloud	Freemium	Unrated	• Designed specifically for investment firms • Robust reporting and customized analytics • Good integration with MS Office suite	• Requires a lot of processing power and memory of the server using the CRM
insightly	$0 - $99 per user per month	3.8	• One of the cheapest service providers • Ideal for small businesses • User friendly	• No information backup • Rigid layout of CRM • Weak report generation capability
salesforce	$25 - $300 per user per month	4.1	• Generation of customized reports and charts • Ability to create multiple tracking points • Ability to expand functionality	• Expensive • Poor Outlook integration • Complex customization tools for simple projects
Microsoft Dynamics CRM	$50 - $85 per user per month	3.2	• Integration available with other MS products (Especially Outlook)	• Difficult to integrate with third parties
nimble	$15 per user per month	4.6	• Ability to integrate with various social platforms • User friendly and smart features	• Poor integration with Gmail • Less functionality in the mobile app

Popular CRM Service Providers
Summary

CRM Provider	Price[1]	User Rating (Out of 5)	Strengths[2]	Weaknesses[2]
pipedrive	$12 per user per month	4.5	• Timeline view helps in tracking progress at each stage of the sales process • Mail sync helps in keeping track of communication regarding each deal	• Weak report generation capability • Outlook sync possible only via third party application
ZOHO Work · Online	$12 - $50 per user per month	3.6	• User friendly • Quick set up and cost effective • Good reporting features	• Lack of integration with other products • Poor call center features
PipelineDeals	$24 - $48 per user per month	4.4	• Easy-to-use interface • Good email tracking, templates, and deal tracking	• Poor email marketing features and functionality • Limited scalability beyond a small business CRM
Salesnet	$25 - $50 per user per month	4.4	• Ability to customize the process/workflow and report options • Good customer service	• Poor email related functions • Poor compatibility with mobile app
Contactually	$35 - $125 per user per month	4.6	• Ability to template replies and follow-ups • Integration with Gmail, Mailchimp, Bombbomb, and Zillow	• Inferior search functionalities • Poor customer service

(1) Price is for the Sales CRM product
(2) User ratings, strengths and weaknesses are sourced from https://www.g2crowd.com/

Popular CRM Service Providers
Summary

CRM Provider	Price[1]	User Rating (Out of 5)	Strengths[2]	Weaknesses[2]
Avidian	$25 - $125 per user per month	4.1	• Embedded directly into Microsoft outlook • Simple interface, activity tracking, and import export functionality	• Customizing requires time and forethought • Outlook Integration leads to performance slowdown
GreenRope	$149 - $499 per month	4.3	• Robust and versatile system • Unlimited users	• Extensive training required • Low storage memory • Charges extra to train and set up
BIGContacts WORK SMARTER DO MORE	$10 - $30 per user per month	4.4	• Minimum training requirement • User friendly	• Limited customizability • Report generation is limited
InfoFlo	$99 per user	4.9	• Creating customizable reports • Easier contact management • Easy email integration	• No mobile app available • Not compatible with Mac OS
bpm'online	$25 - $50 per user per month	4.6	• Customization capabilities using known languages like C# and JavaScript	• Marketing tools to create campaigns require some improvements

(1)   Price is for the Sales CRM product
(2)   User ratings, strengths and weaknesses are sourced from https://www.g2crowd.com/

Popular CRM Service Providers
Summary

CRM Provider	Price[1]	User Rating (Out of 5)	Strengths[2]	Weaknesses[2]
ALTARETURN	Quote based differential pricing	Unrated	• Consolidating contact information • Integration capabilities with accounting provider • Specialized for financial institutions	• Longer setup time as compared to other CRMs due to mass customization
Lynkos	$0 - $75 per user per month	4.4	• Good search capabilities • Informative graphical representation of data • Automate frequently performed tasks	• Limited customizability • Limited pre-set custom fields
SUGARCRM	$40 - $150 per user per month	3.2	• Good customization capability • Good reporting capabilities	• Poor user interface • Complicated processes for basic tasks
NAVATAR GROUP	$200 per user per month	Unrated	• Specialized for financial institutions • User friendly and good reporting capabilities • Fully customizable	• Initial set up takes a longer time compared to others
ORACLE SALES CLOUD	$100 - $300 per user per month	3.3	• CRM On Demand's Reporting and Analytics	• Poor integration facility • Inferior user interface as compared to other CRMs

(1)   Price is for the Sales CRM product
(2)   User ratings, strengths and weaknesses are sourced from https://www.g2crowd.com/

CRM Grid
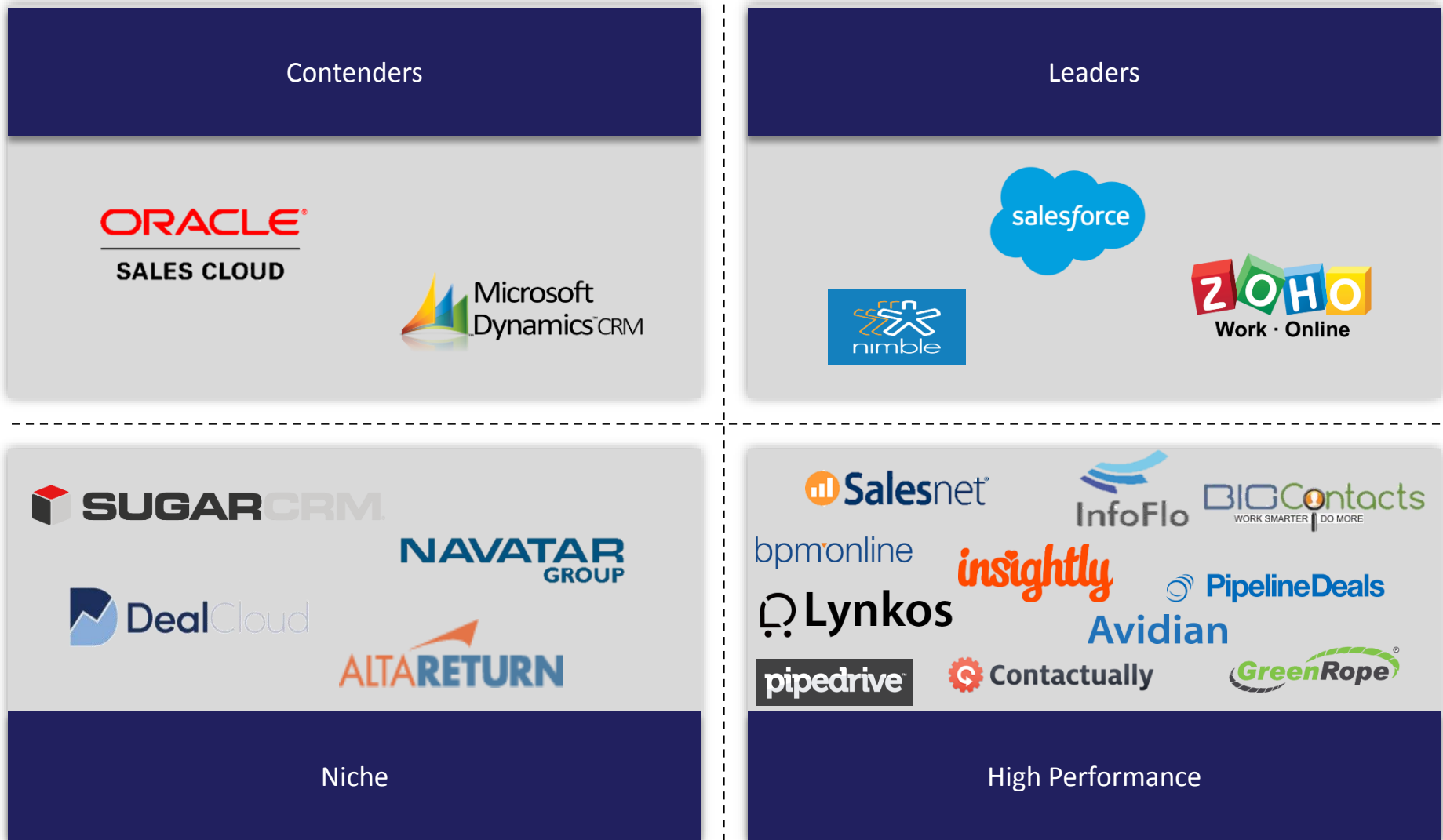
Contenders	Leaders
ORACLE SALES CLOUD, Microsoft Dynamics CRM	salesforce, nimble, ZOHO Work·Online
Niche	High Performance
SUGARCRM, NAVATAR GROUP, DealCloud, ALTARETURN	Salesnet, InfoFlo, BIGContacts, bpm'online, insightly, Lynkos, PipelineDeals, Avidian, pipedrive, Contactually, GreenRope

Case Studies

TresVista has worked with Clients on various CRMs

DealCloud

Client Mandate:

Help a US based private equity client manage their deal flow providing customized templates and processes

Tasks Performed:

- Deal flow management
- Contact mapping
- Tracking meetings and events
- Weekly Calendar update
- Database management
- Contact management
- Creating custom email chains
- Uploading files and documents
- Managing contact/deal/organization information to client specifications

salesforce

Client Mandate:

Maintain client's account by tracking deals, creating tasks, updating contacts information, mapping opportunities and organizations for a US based private equity firm

Tasks Performed:

- Database management
- Contact management
- Contact mapping
- Calendar updates
- Tracking deal flow
- Tracking past/current/upcoming deals
- Exporting contact/deal/organizational information and sorting it to the client's need

insightly

Client Mandate:

Tracking of various deals, banks, limited partners, contacts, and tasks for a US based private equity firm

Tasks Performed:

- Database management
- Contact management
- Contact mapping
- Calendar updates
- Tracking deal flow
- Tracking past/current/upcoming deals
- Monthly report generation

pipedrive™

Client Mandate:

Send emails using outlook and maintain the database with updated tasks, contacts, emails, calendar entries and reminders for a Netherlands based corporate venture fund

Tasks Performed:

- Database management
- Contact management
- Contact mapping
- Calendar updates
- Tracking events
- Creating custom email chain
- Uploading files and documents
- Exporting contact/deal/organization information and sorting to client's need

Appendix

DealCloud

Key Products / Services	Features	Pricing
Cloud Based CRM	Pipeline management, Document retention, Sponsor/intermediary coverage efforts, Portfolio management, Deal marketing, Firm calendars, Task assignment, Key performance indicator analytics, Cloud based CRM, Deal flow management	NA

Private Equity Cloud	Investment Banking	Corporate Development	Public Finance & Advisory	Leveraged Finance
• Gives control of investors, deals and investments • Finding and managing LPs, buyers, sellers, intermediaries and portfolio companies • Fundraising • Investor relations • Capital calls • Deal management • Intermediary management • Portfolio management	• End-To-End Activity Tracking • Relationship Management • Sponsor Coverage • Deal Origination • Fee Estimation And Tracking • Industry Group Management • Targeted Buyers Lists	• Deal Management • Project Management • Post-Merger Integration • Targeted Watchlist • Due Diligence	• End-To-End Activity Tracking • Relationship Management • Sponsor Coverage • Deal Origination • Fee Estimation And Tracking • Industry Group Management • Targeted Investor Lists	• Deal Sourcing • Sponsor And Intermediary Coverage • Portfolio Reporting • Fundraising • Investor Relations

DealCloud has various other products. For complete list please visit (https://www.dealcloud.com)

Salesforce

Key Products / Services	Features			Pricing
Sales	Contact management, lead management, reports and dashboards, sales forecasting, sales collaboration, email integration, workflow and approvals, territory management, files sync and share, inside sales console, sales performance management, mobile, partner management, opportunity management			$25 - $300 per user per month

Group $25	Professional $ 65	Enterprise $125	Unlimited $250	Performance $300
• Account & contact management • Opportunity tracking • Lead scoring, routing, and assignment • Task & event tracking • Customisable reports & standard dashboards • Mobile access, customisation, & administration • Chatter — company social network • Outlook side panel & sync • Case management	All group features, plus • Campaigns • Customisable dashboards • Collaborative forecasts • Products, quotes, & orders • Mass email • Role permissions • Salesforce engage	All professional features, plus • Workflow & approval automation • Report history tracking • Enterprise territory management • Profiles & page layouts • Custom app development • Integration via web service API • Salesforce identity • Salesforce private appexchange	All enterprise features, plus • Unlimited customisations • Unlimited custom apps • Multiple sandboxes • Additional data storage • 24/7 toll-free support • Access to 100+ admin services • Unlimited online training	Fully integrated sales and service platform, including all unlimited features, plus • Single console view for inside sales • Access to new contacts & accounts • Auto data cleansing • Goals, coaching & rewards for teams • Integrated knowledge base • Live web chat • Additional sandboxes • Additional data storage

https://www.salesforce.com/
All prices are for per user per month (unless stated otherwise)

Insightly

insightly

Key Products / Services	Features	Pricing
CRM	Lead management, contact management, calendaring and events, custom fields and filters, file sharing, web to lead & web to contact and following, linking between contacts, organizations, opportunities & projects, mass email and email templates, sales opportunities, integration with email, integrated project management	$0 - $99 per user per month

Free $0	Basic $12	Plus $29	Professional $49	Enterprise $99
• Free upto 2 users	• Advanced reports (unlimited)	All basic features, plus	All plus pack features, plus	All professional features, plus
• Advanced reports (max 10)	• Scheduled reports & smart alerts (max 5)	• Scheduled reports & smart alerts (max 25)	• Scheduled reports & smart alerts (max 100)	• Scheduled reports & smart alerts (max 250)
• Email templates (5)	• Mobile app business card scanner (5 cards per user per month)	• Mobile app business card scanner (15 cards per user per month)	• Mobile app business card scanner (25 cards per user per month)	• Mobile app business card scanner (50 cards per user per month)
• Mass email (max send 10/day)	• Email templates (50)	• Email templates (100)	• Email templates (unlimited)	• Mass email (max send 10,000 per day)
• 10 custom fields (2 per record)	• Mass email (max send 500/day)	• Mass email (max send 2,500 per day)	• Mass email (max send 5,000 per day)	• 1000 custom fields (200 per record)
• 2,500 records up to 200 MB storage	• 50 custom fields (10 per record)	• 250 custom fields (50 per record)	• 500 custom fields (100 per record)	• 500k records
• 500 rows file import limit	• 25k records	• 100k records	• 250k records	• 250GB storage
• Online knowledge base & community Q&A	• 1GB storage	• 10GB storage	• 100GB storage	• 50,000 rows import limit
	• 5,000 rows import limit	• 25,000 rows import limit	• 50,000 rows import limit	
	• Email support	• Priority email support		
	• On-boarding sessions			

Microsoft Dynamics CRM

Key Products / Services	Features	Pricing
Sales	Opportunity management, social selling, planning and management, content collaboration, mobile sales, sales intelligence	$50 - $85 per user per month

Professional (existing office 365 user) $50	Professional $65	Sales Productivity $85
Includes sales force automation, unified service desk & microsoft social engagement	Includes sales force automation, unified service desk & microsoft social engagement	Includes microsoft dynamics crm professional & office 365 enterprise e5
• Social listening	• Social listening	• Sales productivity includes:
• Social media analytics	• Social media analytics	• Microsoft dynamics CRM online professional
• Workflows and approvals	• Workflows and approvals	• Office suite 2016
• Sales automation	• Sales automation	• Online conferencing
• Customer service automation	• Customer service automation	• Instant messaging and skype connectivity
• Unified service desk	• Unified service desk	• Cloud-based call management
• Sales campaigns	• Sales campaigns	• PSTN conferencing (in select geographies)
• Reports and personal dashboards	• Reports and personal dashboards	• Advanced email and calendars
• Integration via web services	• Integration via web services	• Advanced security
• Mobile access	• Mobile access	• Analytics tools
• Access to customizations and extensions	• Access to customizations and extensions	• Mobility
• Minimum 5 seat purchase requirement	• Minimum five-seat purchase requirement for listed CRM pricing	

https://www.microsoft.com/en-in/dynamics/crm.aspx
All prices are for per user per month (unless stated otherwise)

Zoho

Key Products / Services	Features	Pricing
CRM	Visitor tracking, lead management, contact management, account management, sales collateral, web forms, workflow automation, marketing automation, opportunity management, role-based security, sales reports & dashboards, advanced CRM analytics, sales tracking, sales performance management, territory management, sales forecasting, custom functions, developer API	$12 - $50 per user per month

Standard $12	Professional $20	Enterprise $35	CRM Plus $50
• Sales forecasting	All standard features, plus	All professional features, plus	• Email marketing
• Reports and dashboards	• Email integration	• Territory management	• Visitor tracking
• Document library	• Social CRM	• Custom modules	• Proactive chat
• Roles and profiles	• Google adwords integration	• Custom applications	• Social media marketing
• Mass email	• Workflow automation	• Custom buttons	• Sales force automation
• Call center connectors	• Inventory management	• Workflow approval processes	• Sales tracking
• 100,000 records	• Macros	• Time-based actions	• Social selling
	• Unlimited records	• Multiple currencies	• Sales presentations
			• Customer service management
			• Project management
			• Integration with google adwords
			• Advanced CRM analytics
			• Key performance indicators
			• Territory management

PipelineDeals

PipelineDeals

Key Products / Services	Features	Pricing
CRM	Sales acceleration, deal tracking, lead management, contact management, activity tracking, mobile CRM, data importing, custom list views, sales force management, sales goals, account customization, email integration, automations, integrations, sales pipeline management	$24 - $48 per user per month

Standard
$24

- Sales pipeline management
- Activity & sales reporting
- Google & outlook integrations
- Unlimited leads, contacts, deals & tasks
- Unlimited document storage
- Dynamic custom fields
- Saved searches
- Amazing customer support
- Bank-quality security
- Free iPhone and android apps
- Open api for developers
- Company management
- Integrations

Accelerator
$48

All standard features, plus

- Integrated email inbox
- Email automation & acceleration
- Trackable email campaigns
- Email templates & analytics
- Unlimited customizable fields
- Task & notification automation

Salesnet

Salesnet

Key Products / Services	Features	Pricing
CRM	Lead management, opportunity management, contact management, account management, dashboard management, reports, email marketing, mobile CRM, document library, Microsoft office integration, campaign management, social media integration, process builder, configurable web forms, integration links, user & data configuration, multi-tenant, data architecture, isolation options, session timeout & tracking	$25 - $50 per user per month

Express $25

- Configurable nomenclature
- Contacts & accounts management
- Custom fields
- Dashboards and reports
- Data import wizard
- Email marketing platform
- Help desk
- Leads and opportunity management
- Mobile CRM
- Process builder with smart forms
- Real-time pipeline & accurate forecasting

Professional $50

All express features, plus

- Enhanced email marketing platform
- Microsoft office add-ins (outlook, word and excel)
- Web services API
- Configurable HTML for web forms
- Integration links
- Help desk phone support

Enterprise Customised Pricing

All professional features, plus

- Hosted applications
- Dedicated support
- Custom functionality
- Enhanced security options including data isolation

Contactually

Contactually

Key Products / Services	Features	Pricing
CRM	Database management, network management, contact management, mass messaging, customizable programs, automated business processes, content libraries, pipeline management, team management, assignment, filtering & bulk change controls, mobile CRM	$35 - $125 per month per user

Basic $35	Professional $59	Enterprise $125
• Connect unlimited email accounts • Follow-up reminders • Social network integration • Bulk messaging (up to 50 per day) • Various app integrations	All basic features, plus • Customizable email templates • Team contact sharing • Bulk messaging (up to 300 per day) • Article + content sharing • Programs for scheduled workflows • Pipelines for sales tracking • Introductions • Introduction templates	All professional features, plus • Advanced permissions • Custom integrations • Audit logging

https://www.contactually.com/
All prices are for per user per month (unless stated otherwise)

Avidian

Key Products / Services	Features	Pricing
CRM	Tracking campaign metrics, sales reports, and dashboards from inside Microsoft Outlook, Sales pipeline management, sales automation, mobile CRM, reports and analytics, integrations and pre-packed templates for different industries	$25 - $125 per user per month

Contact Manager $25

Licensing: 2+ users

- Company and contact manager
- Outlook contact syncing
- Email linking
- Sales automation
- Email tracking and sharing
- Quick installation and implementation (2 hours)

Team $55

Licensing: 4+ users

All contact manager features, plus

- Sales pipeline management
- Opportunity & company reporting
- Sales automation
- Sales activity tracking/reporting
- CRM analytics: visual dashboard
- Customizable dashboards
- Mobile browser and iphone apps
- 400+ integration options
- Role & department based access control, management & data-sharing
- Email tracking and sharing
- Cloud and on-premise hosting

Enterprise $75

Licensing: 4+ users

All team features, plus

- Unlimited departments
- Department specific templates, fields, and forms
- Data and record sharing access management across departments
- Automated notifications with prophet instant

Ultimate $125

Licensing: 10+ users

All ultimate features, plus

- API toolkit access
- Up to 10 hours data integration services
- Gold level technical support (includes priority response)
- Premium implementation package (up to 20 hours professional services)

GreenRope

Key Products / Services	Features	Pricing
CRM	Marketing automation, email marketing, event management, calendar booking, websites and analytics, social network marketing, project management, SMS/MMS/Call Management, surveys, tracking and stats, templates, advanced marketing tools, social collaboration, CRM Mobile application, lead capture forms, lead scoring and predictive analytics	$149-$499 per month (plus account setup charges)

Starter $149	Pro $169	Premium $199	Powerhouse $249	Magnificent $299	Supreme $449	Ultimate $499
• 1,000 contacts	• 3,000 contacts	• 5,000 contacts	• 7,500 contacts	• 10,000 contacts	• 25,000 contacts	• 50,000 contacts
• Unlimited users	• Unlimited users	• Unlimited users	• Unlimited users	• Unlimited users	• Unlimited users	• Unlimited users
• Unlimited emails	• Unlimited emails	• Unlimited emails	• Unlimited emails	• Unlimited emails	• Unlimited emails	• Unlimited emails

Standard Account Setup $399

- Implementation/training form and calendar to schedule sessions within 30 days at customer specified time
- Three (3) hours of dedicated one-on-one training with a greenrope on-boarding manager
- A custom implementation guide custom designed specifically for the customers business
- Data analysis and import assistance
- Special continued training pricing at $149/2 hrs once the initial training is completed

Premium Account Setup $499

- Implementation/training form and calendar to schedule sessions within 30 days at customer specified time
- Three (3) hours of dedicated one-on-one training with a greenrope on-boarding manager
- A custom implementation guide custom designed specifically for the customers business
- Data analysis and import assistance
- Special continued training at $149/2 hrs once initial training is completed
- One (1) hour with a marketing consultant
- One (1) hour of strategic implementation with an on-boarding manager

https://www.greenrope.com/
All prices are for per month (Except one time account setup charges)

BIGContacts

Key Products / Services	Features	Pricing
CRM	Revenue opportunities, pipeline management, email marketing, sales tracking , marketing automation, sales reports, sales opportunities, notes, calls, meetings, tasks, files, photos, along with all email communication, PC, Mobile, tablet support	$10 - $30 per user per month

Big $10	Bigger $20	Biggest $30
• Optional annual subscription - $5	• Optional annual subscription - $15	• Optional annual subscription - $25
• Total contacts – 1,000	• Total contacts – 10,000	• Total contacts – 50,000
• Total file storage – 2GB	• Total file storage – 10GB	• Total file storage – 50GB
• Contact management module	• Contact management module	• Contact management module
	• Email integration	• Email integration
	• Sales tracking module	• Sales tracking module
	• Auto reminders & alerts	• Auto reminders & alerts
	• Quickbooks online sync – contact sync only	• Quickbooks online sync – contact & transaction sync
		• Bigbox (email inbox)
		• Teamchat (instant messaging)
		• Google calendar sync
		• Outlook synchronization
		• Social media tracking
		• API access

bpm'online

bpm'online

Key Products / Services	Features	Pricing
Sales	360° customer view, collaboration tools, business process management, lead management, opportunity management, orders and invoices, field sales management, sales forecasting, contract management, product management, document flow automation, project management, mobile sales, knowledge management, synchronization and integration, system designer	$25 - $50 per user per month

Team $25	Commerce $30	Enterprise $50
• Opportunity management	• Orders and invoices	• Opportunity management
• Out-of-the-box process for large sales	• Products and services	• Out-of-the-box process for large sales
• Product and services	• Product catalogue management	• Orders and invoices
		• Sales forecasting
		• Contract management
		• Products and services
		• Product catalogue management
		• Project management

https://www.bpmonline.com/
All prices are for per user per month (unless stated otherwise)

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Oracle Cloud

ORACLE
SALES CLOUD

Key Products / Services	Features	Pricing
Sales	Sales force automation, sales performance management, sales analytics and forecasting, integration and extensibility, social collaboration, partner relationship management	$100 - $300 per user per month

Standard $100	Enterprise $200	Premium $300
• Core sales force automation1 • Oracle sales cloud mobile app • Oracle sales cloud call report app • Sales analytics2 • Sales forecasting • Oracle social network • Oracle sales cloud for outlook • Sales catalog • Territory management • Customer data management3 • Configuration and customization toolset4 • One test environment	All standard features, plus • Oracle mobilytics • Mobile app designer • Campaigns • Quota management • Incentive compensation5 • Oracle sales cloud for IBM notes • Sales predictor • Presentation sharing with sales lightbox	All enterprise features, plus • Whitespace analysis • Oracle voice • Enterprise contracts

https://cloud.oracle.com/en_US/customer-experience-cloud
All prices are for per user per month (unless stated otherwise)

Lynkos

Lynkos

Key Products / Services	Features	Pricing
CRM	Contact management, opportunities, deals, cases, projects, tags & segmentation, email campaigns, custom logo, client portal, calendar, tasks, automated tasks reporting, special permissions, enhanced security, social feeds, custom fields, native mobile app, alerts, product catalog, social advertising, billing/ invoicing, lead management and lead tracking	$0 - $74.99 per user per month

Free $0	Awesome $14.99	Pro $39.99	Max $74.99
• Unlimited users	• Unlimited users	All awesome features, plus	• Unlimited users
• Unlimited contacts	• Unlimited contacts	• 30,000 records	• Unlimited contacts
• 750 records	• 10,000 records	• Up to 60 custom fields	• Unlimited records
• Up to 10 custom fields	• Up to 30 custom fields	• Unlimited published products	• Up to 60 custom fields
• Unlimited published products	• Unlimited published products	• Support- tickets + chat	• Unlimited published products
• Support- tickets	• Support- tickets + chat	• Mass email	• Support- tickets + chat
• Storage 250MB	• Quotes	• Tasks automation	• Mass email
	• Payments	• Analytics	• Tasks automation
	• Premium integrations	• Promoted products	• Analytics
	• Data export	• Limited permissions users	• Promoted products
	• Email integrations	• Web forms	• Limited permissions users
	• Storage 2GB	• Storage 6GB	• Web forms
			• Storage 12GB
			• Additional storage $5/GB/month

Sugar CRM

SUGARCRM

Key Products / Services	Features	Pricing
SugarUX (CRM)	Sales automation and forecasting, marketing lead management, support automation, call center automation, reporting & dashboards, sugarcrm mobile, unlimited online support, revenue line item level opportunity tracking forecasting, product level quotes, advanced workflow, role-based views, 100 concurrent customer self-service portal users, sql-based reporting access, support for oracle and DB2 (on-site)	$40 - $150 per user per month

Professional $40	Enterprise $65	Ultimate $150
Minimum 10 user license	Minimum 10 user license	Minimum 10 user license

Professional

Minimum 10 user license

- Sales automation and forecasting
- Marketing lead management
- Support automation
- Call center automation
- Reporting & dashboards
- Sugarcrm mobile
- Cloud or on-premise deployment
- 15GB storage
- Unlimited studio customizations
- Unlimited online support
- Support for mysql and SQL server (on-site)

Enterprise

All professional features, plus

- Revenue line item level opportunity tracking forecasting
- Product level quotes
- Advanced workflow
- Role-based views
- 100 concurrent customer self-service portal users
- Sql-based reporting access
- Support for oracle and DB2 (on-site)
- 12x5 (hours/days) email and phone support
- 60GB storage

Ultimate

All enterprise features, plus

- 24x7 support
- Assigned technical account manager
- 250GB storage
- Up to 5 sandbox instances (on-demand)

Navatar

NAVATAR GROUP

Key Products / Services	Features	Pricing
CRM	Company profiles, deal tracking, intermediary tracking, deal management, intermediary metrics, deal funnel, debt financing, portfolio management, business unit reporting, data access & permissions, compliance, buyer/seller matching, create fund profile, buyer/seller matching, search deals, download contacts, LP portal for fund marketing and investor relations, combining a virtual data room with a CRM for investor relations	~$200 per user per month

Private Equity	M&A Cloud	Asset Management Cloud	Corporate Development Cloud	Venture Capital Cloud
• End-To-End Activity Tracking • Relationship Management • Institutional Knowledge • Real-Time Intermediary Coverage • Configurable Deal Execution • Aggregate Deal Management • Fundraising And IR • Portfolio Monitoring And Reporting	• Specially built for deal origination and execution processes • Manage all activities and records associated with prospects and buyers • Manage marketing and communications initiatives • Manage all aspects of business development	• Detailed workflows needed to manage client holdings across different asset classes such as mutual funds, private equity, credit and real estate funds, as well as custodians • Manage sales and distribution through various channels • Provides powerful analytical tools to clients and management • Automating the capture of information needed for regulatory compliance	• Full control of deals and investments • Find and manage buyers, sellers, intermediaries and portfolio companies • Company profiles • Deal tracking • Intermediary tracking • Deal management • Intermediary metrics • Deal funnel & debt financing • Portfolio management • Business unit reporting • Data access & permissions • Buyer/seller matching	• Full control of investors, deals and investments • Manage LP's, investments, intermediaries and portfolio companies • Fundraising • Investor relations • Capital calls • Deal management • Intermediary management • Portfolio management

Navatar has different CRM platforms catering to different segments, for complete list of products visit http://www.navatargroup.com/

Single Price Package CRMs

DealCloud	nimble	pipedrive	InfoFlo	ALTARETURN
Freemium	**$15 per user per month**	**$12 per user per month**	**$99 per user**	**Quote based differential pricing**
• Pipeline management • Document retention • Sponsor/intermediary coverage efforts • Portfolio management • Deal marketing • Firm calendars • Task assignment • Key performance indicator analytics • Cloud based CRM • Deal flow management	• Contact management • Social channel management • Integrated message management • Sales automation tools • Activity management	• Pipeline view • Lead management • Contact management • Calendaring and events • Automatic address book • Notes and comments • Lightning fast search • Custom fields and filters • File sharing • Notification • Linking between contacts, organizations & deals • Integration with email (including BCC) • Integrated project management • Mobile app • Multi-language, sales statistics	• Contact management • Custom fields • Relationship management • Sharing & collaboration • Leads & opportunities • Search functionality • Document archiving • Task management • Email management • Dashboard management • Outlook import • Calendar management • CSV import • Sip softphone • Recording management • Email & calendar editor • Social media integration	• Investor relations • Deal tracking • Contact management • Investor portal • Integrated fund-raising platform • Deal pipeline management • Outlook integration