

Teamgate CRM Guide

Last update: September 1, 2015

Understanding and Learning the Basic Features of Teamgate CRM

The screenshot displays the Teamgate CRM interface. At the top, there is a navigation bar with the Teamgate logo and a 'Deals' tab. Below this, a 'Sales Pipeline: My Deals' section shows four stages: DEMO REGISTRATION (1%, 120,00 €), COLD COLLING (5%, 120,00 €), WEBINAR (40%, 180,00 €), and TESTING (60%, 300,00 €). The main area contains a grid of deal cards, each with a title, value, and a 'Create Event' button. A 'Filter' panel is open on the right, showing various filters like 'Actoinable', 'Hot', 'Stage', 'Tags (2)', 'Source', 'Owner', 'Estimated close date', and 'Period'. The 'Source' filter is expanded, showing a list of sources: 'Our Website' (9), 'Ad' (30), 'Referral' (18), and 'Word of mouth' (2). The 'Word of mouth' filter is selected. At the bottom of the filter panel, there are 'APPLY', 'SAVE', and 'CLEAR' buttons. Below the filter panel, there is a section for 'Filters you saved:' with a filter named 'More than 3 month old deals' and a 'Remove' link.

This guide is meant to help businesses, which already use or consider to purchase Teamgate as a CRM.

The guide covers basics of Teamgate features, key concepts, tips, tricks and advices. Also, you will find here information about common tasks performed in Teamgate - like using Talk features, running Reports or importing your data.

To learn more about extra features or find answers that you are looking for, please see our [Support Section](#).

Introduction

Please, welcome Your New Team Member – Teamgate CRM. A CRM that Actually Works for Your Business.

Teamgate has started out as many startups do these days. The most of Teamgate's Team is based in Lithuania, where the product and company itself was launched back in 2012. By raising a "seed" rounds of funding, Teamgate has built a healthy business with 20+ employees, an office in London, and fast growing customer base all around the world.

Teamgate is a cloud based Sales CRM with easy-to-use interface, which aligns you to get more Leads, track your sales process, manage contacts and analyse sales results without efforts.

The product is excellent for small and mid-size businesses or teams which focus on an easy start and do not fit with complexity of the larger CRM tools like Salesforce or Dynamics CRM.



“People don’t buy CRM, they buy better versions of their business.”
Teamgate wisdom.

Introduction

Key Concepts and Terms

If you're getting up to speed with Teamgate, it's helpful to learn some key concepts and terms. They'll come up frequently as you interact with product, our documentation, and our service professionals. It will help you to understand how Teamgate and its' main components work.

Application

A collection of components such as tabs, icon sections, dashboards, and visual pages. In other words, application is an entire system you work with.

My Account

Each paid or trial customer has its own access to Teamgate application by using special URL address - "Your Account."

User / License

User is a person who has access to your Teamgate account. One user is equal to one license.

Trial

It is an access to your demo Account for a limited time period with an unlimited amount of users.

SaaS

Software delivered not by traditional means (such as on disk) but in the cloud, as a service. There is nothing to download or install, it updates automatically.

Subscription

Regular payment per selected period of time for using your Account. Subscription fee is calculated per active amount of users.

Release

Teamgate releases new features at least once per month. You can find release notes in our "Support Section" in our application.

Teamgate

Meaning the name of the cloud computing CRM service and the company name.

Navigation

Desktop Navigation

Teamgate uses different icons and colours to indicate every single section in the application.



Leads

People and companies that are potentially interested in your products or services



Companies

List of companies (accounts) you are doing business with



People

List of people you are doing business with



Deals

Sales opportunities related to your contacts



Talk

Social tool for internal organisational communication



Files

All your files in one place



Insights

A complete list of reports related to your goals and sales efforts



Organizer

Everything for your time management

Navigation

Desktop Navigation

You will find “new” icon in each section to create new records such as Leads or Deals. Each section has its own search tool and filter areas with different extra options, like maps or pipeline. Account and profile settings can be found by clicking on the picture icon on the top right corner of the page.

New records

Main sections

Search & Filters

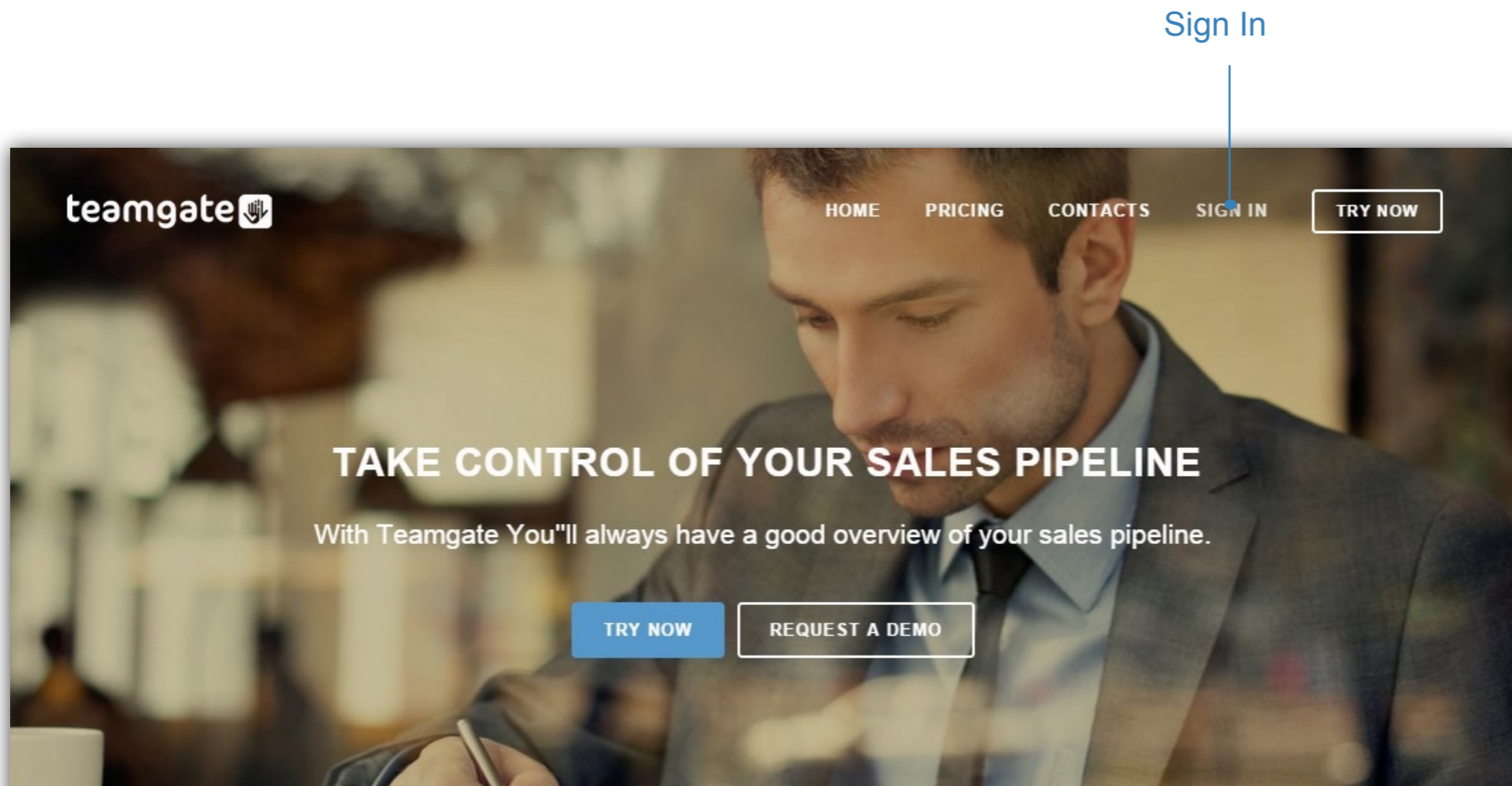
Settings & Profile

The screenshot displays the Teamgate desktop interface. At the top, there is a navigation bar with the 'teamgate' logo and several icons. A 'NEW' button is located in the top left corner of the main content area. The main content area is titled 'Sales Pipeline: My Deals' and shows a pipeline with five stages: DEMO REGISTRATION (1%), COLD COLLING (5%), WEBINAR (40%), TESTING (60%), and CLOSURE (80%). Each stage contains deal cards with details such as deal name, value, and contact information. A search and filter icon is visible in the top right corner, and a user profile icon is in the top right corner of the navigation bar.

Navigation

Logging in

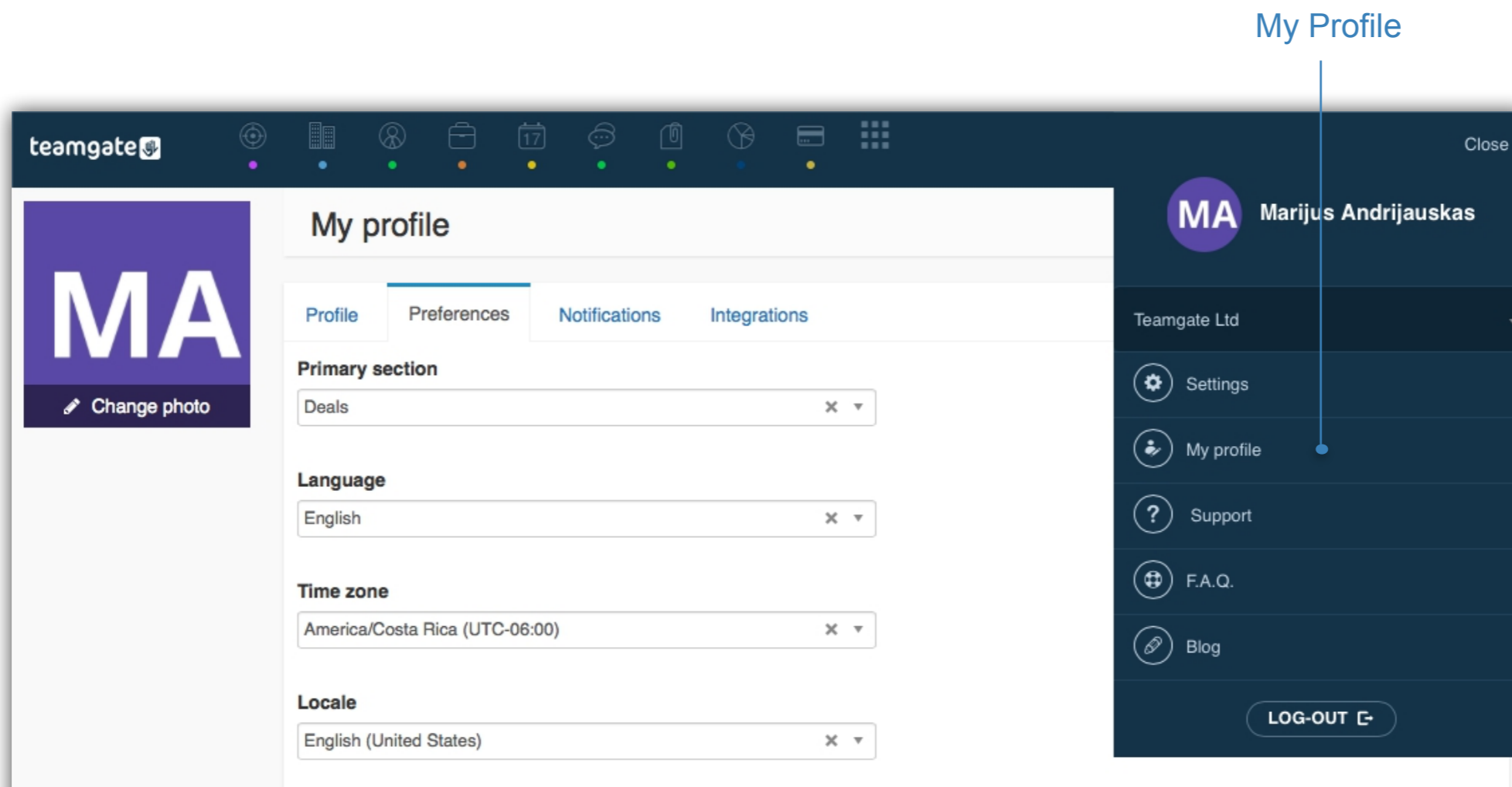
Simply access Teamgate from anywhere in the world using any device - all you need is an Internet connection. To sign in, visit [teamgate.com](https://www.teamgate.com) and click “SIGN IN” button at the top right corner of the page. Enter the credentials and click “Sign In.”



Navigation

My Profile

At the top of Teamgate page, click your name icon. From the menu under your name, select “My Profile.” You can set your personal information, change your password, add notifications or set personal preferences in your profile settings.

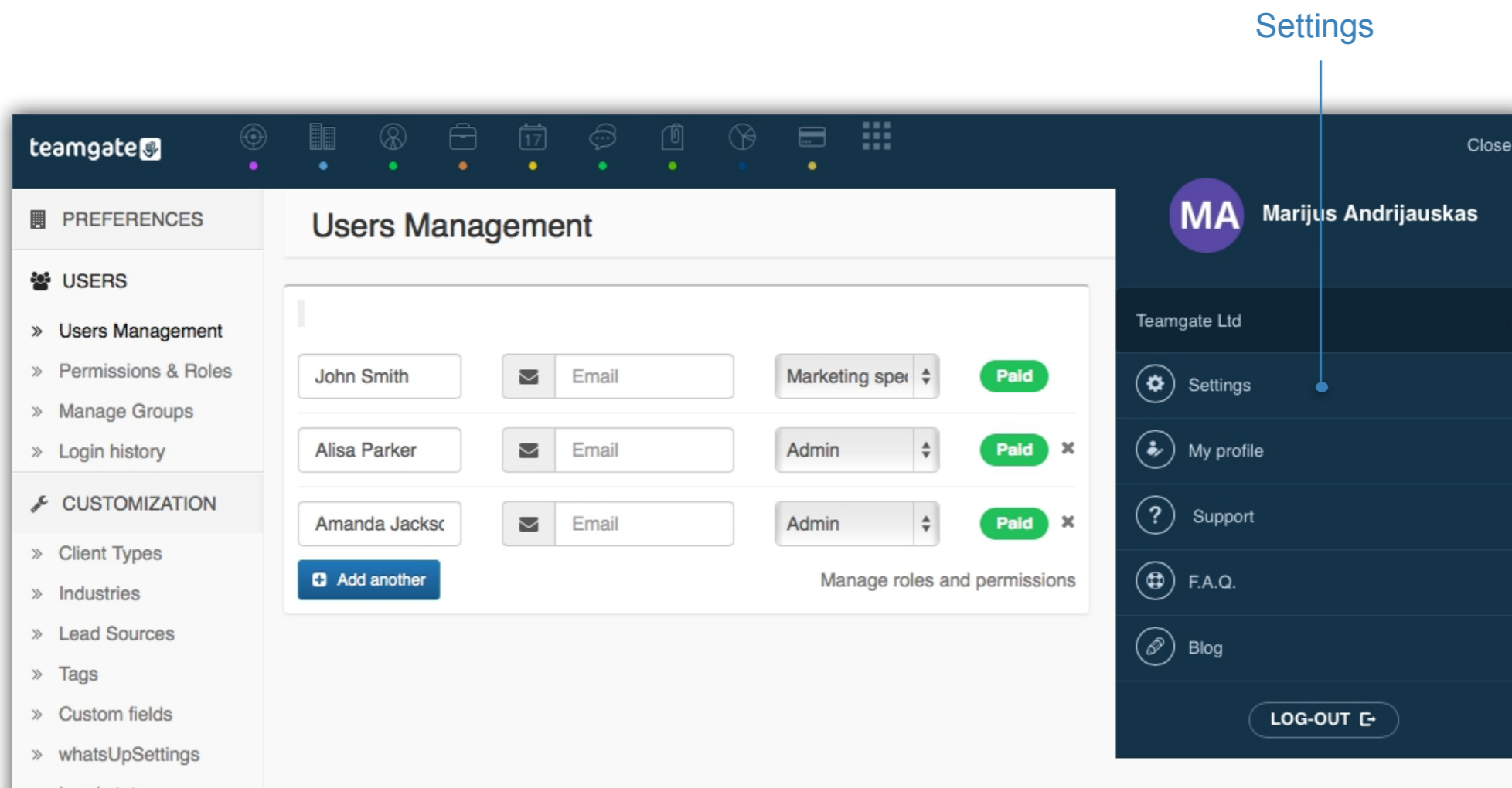


The screenshot shows the Teamgate user interface. At the top, there is a dark navigation bar with the 'teamgate' logo and several icons. Below this, the main content area is titled 'My profile'. On the left, there is a profile card with a purple background and the initials 'MA', and a 'Change photo' button. The main profile area has four tabs: 'Profile', 'Preferences', 'Notifications', and 'Integrations'. The 'Profile' tab is active, showing settings for 'Primary section' (Deals), 'Language' (English), 'Time zone' (America/Costa Rica (UTC-06:00)), and 'Locale' (English (United States)). On the right side, a dark dropdown menu is open, showing the user's name 'Marijus Andrijauskas' and the company 'Teamgate Ltd'. The menu items are: Settings, My profile (highlighted with a blue dot and a line pointing to the text 'My Profile' above it), Support, F.A.Q., and Blog. At the bottom of the menu is a 'LOG-OUT' button.

Navigation

Settings

“Settings” is a place to manage your Account preferences, profile, custom fields and status, tags and much more. You can set up your integrations and manage your user roles, permissions and users as well.



The screenshot displays the Teamgate user interface. On the left, a sidebar contains navigation options under 'PREFERENCES' and 'CUSTOMIZATION'. The main content area is titled 'Users Management' and shows a table of users with columns for name, email, role, and status. A dropdown menu is open on the right side, showing the user's profile 'Marijus Andrijauskas' and a list of settings options. A blue line points from the 'Settings' option in the dropdown to the 'Settings' label above it.

Name	Email	Role	Status
John Smith	Email	Marketing spei	Paid
Alisa Parker	Email	Admin	Paid
Amanda Jacksc	Email	Admin	Paid

- Teamgate Ltd
- Settings
- My profile
- Support
- F.A.Q.
- Blog
- LOG-OUT

Navigation

Demo Data

When You start the Trial version of Teamgate, application gives you an option to upload demo data. It is made for your convenience, so that in short period of 15 days, you can experience all that Teamgate has to offer. There is no need to fill in huge amount of data, simply use pre-made materials. At any point of trial period, you can delete demo data and start entering your own information, or upload it from your own database.

Load and remove demo data

The screenshot displays the Teamgate CRM interface. At the top, there is a navigation bar with the 'teamgate' logo and several icons. Below this is a header for 'All Companies' with a dropdown arrow. The main content area shows a list of companies with columns for 'Company' and 'Contacts'. Each company entry includes a checkbox, a company name, a description, status dropdowns, and contact information. The sidebar on the right shows the user profile for 'Marijus' with a 'Close' button and a list of navigation options: DEV synergycloud, Settings, My profile, Support, F.A.Q., Blog, and Load demo data. A blue line points from the text 'Load and remove demo data' to the 'Load demo data' option in the sidebar.

Company	Contacts
<input type="checkbox"/> PLI Pilno Leado Imone testuotojas, Pilnas Leadas Non Customer Prospect +370 678 90123 pilnas@leadas.net	
<input type="checkbox"/> Еврохим Non Customer Non Prospect +7 (495) 866 5454 sebas_speroni@yahoo.com	
<input type="checkbox"/> Imone konvertavimui testavimas, Leadas konertavimui Non Customer Lost Prospect	
<input type="checkbox"/> mmmmmm	fffff

Navigation

Goals

In order to get the most out of Insights and Reports, you can set up Activity and Sales Goals for your team. This will allow you to track how you and your team members perform toward the set up goals. Visible Goals and Activity Indicators not only boost motivation of the team, but also allow each team member to evaluate themselves individually.

In order to set Activity and Sales Goals, go to Insights and choose Goals on your left hand side from the side bar.

The screenshot shows the 'Goals' page in the Teamgate application. The left sidebar contains navigation items: Sales Activities, Sales Pipeline, Marketing, Sales Results, Dashboard, and Goals. The 'Goals' section is expanded, showing sub-items: Booking Goals, Sales Goals, Calling Goals, Connection Goals, Meeting Sched. Goals, and Meeting Goals. The main content area is titled 'Goals' and includes a subtitle 'plan your company's sales and activity Goals by employee or period'. Below this, there are tabs for 'Booking Goals', 'Sales Goals', 'Calling Goals', 'Connection Goals', 'Meeting Sched. Goals', and 'Meeting Goals'. The 'Sales Goals' tab is active, displaying a 'Deals' section with a sub-header 'set your Sales Goals for employee per period selected'. A filter bar allows selecting an employee, with 'Simona Labanauskaitė' chosen. Below the filter, a table shows sales goals for Simona Labanauskaitė for the months of June, July, and August 2015. Annotations with blue lines point to specific elements: 'Select your goal type' points to the 'Goals' menu item; 'Set goals' points to the 'Sales Goals' tab; 'Set goal owner' points to the employee filter; and 'Set goal period' points to the 'Quarter' button.

Select your goal type

Set goals

Set goal owner

Set goal period

teamgate

MA

Goals plan your company's sales and activity Goals by employee or period

Booking Goals Sales Goals Calling Goals Connection Goals Meeting Sched. Goals Meeting Goals

Deals

set your Sales Goals for employee per period selected

Month Quarter Year

Click to filter by Employee Simona Labanauskaitė x select your employees to setup Goals

Simona Labanauskaitė	
2015 Jun	€ 5000
2015 Jul	€ 17000
2015 Aug	€ 17000



Leads

What is a Lead?

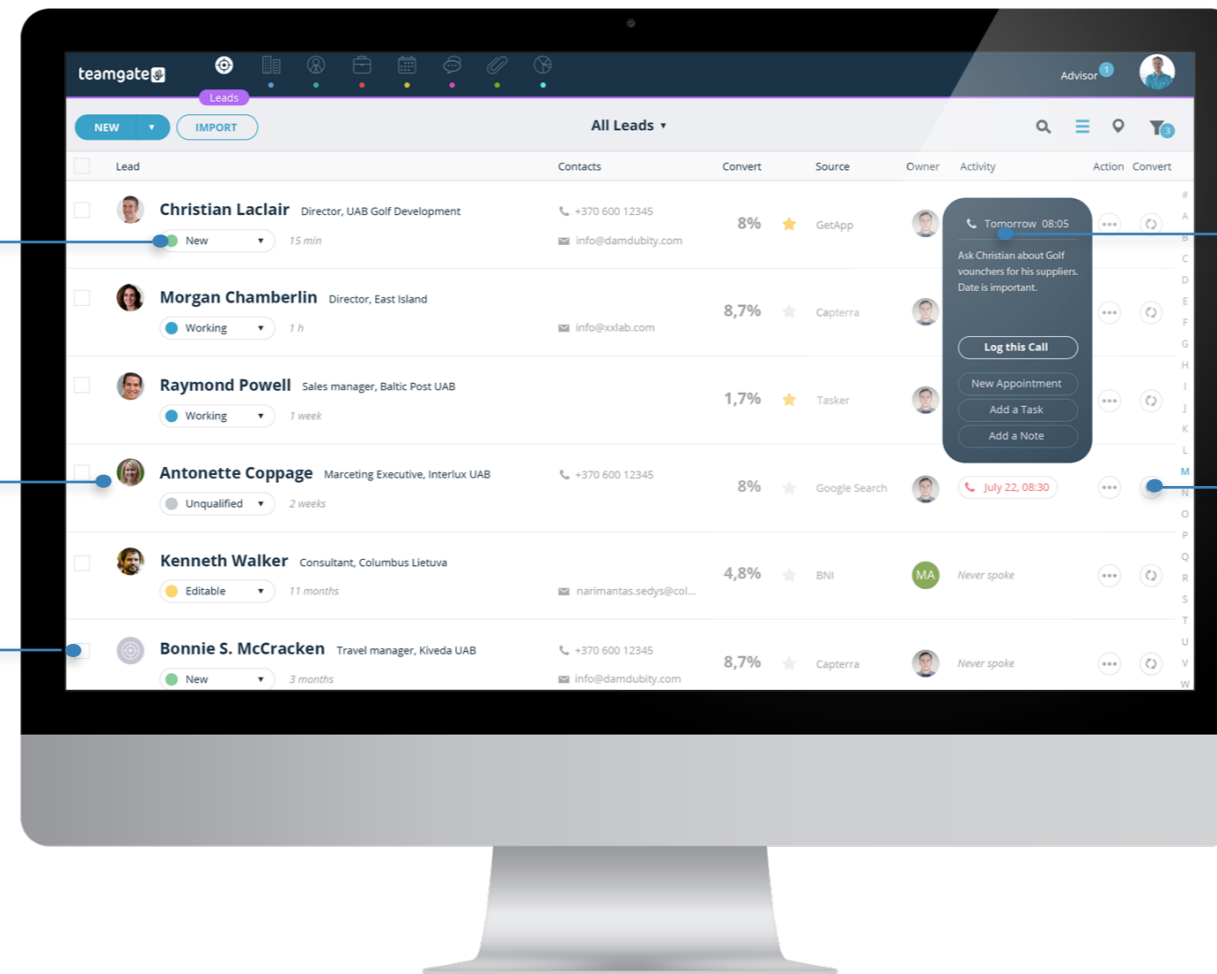
A Lead is a person, company or business opportunity that has not been confirmed and added to your Sales Pipeline yet. Usually, leads come from personal networking, seminars, trade shows, purchased contact lists, ads and other channels.

When lead fits within your requirements and becomes qualified, it will be converted to a contact and to a deal. A list of your Leads can be found by clicking on the (icon) in the main menu at the top of the application.

Lead status

Picture / Country

Massive actions



Activity

Convert Lead



Leads

Importing Leads

You can import new leads directly in Leads section. To import leads, simply press “Import” button and follow instructions. Leads can be imported from CSV or XLSX file.

Teamgate also supports importing from third party applications like Google, LinkedIn or Mac Contacts.

Import leads

The screenshot shows the Teamgate interface for the 'Leads' section. At the top, there is a navigation bar with the 'Leads' tab selected. Below the navigation bar, there are buttons for 'NEW' and 'IMPORT'. The main area displays a table of leads with columns for 'Lead', 'Contacts', 'Convert', 'Source', 'Owner', 'Activity', 'Action', and 'Convert'. The table contains several lead entries, including Christian Laclair, Morgan Chamberlin, Raymond Powell, and Antonette Coppage. A call log popup is visible for Raymond Powell, showing a call on 'Tomorrow 08:05' with a duration of 08:05. The call log includes a transcript: 'Sakyti, kad perimu reikalus, gal gali duoti Ceslovo numeri ir paklausti Ceslovo, kada mes tesiam darbus.' and buttons for 'Log this Call', 'New Appointment', 'Add a Task', and 'Add a Note'.

Lead	Contacts	Convert	Source	Owner	Activity	Action	Convert
<input type="checkbox"/> Christian Laclair Director, UAB Golf Development New 15 min	+370 600 12345 info@damdubity.com	8%	★ GetApp				
<input type="checkbox"/> Morgan Chamberlin Director, East Island Working 1 h	info@xxlab.com	8,7%	★ Capterra				
<input type="checkbox"/> Raymond Powell Sales manager, Baltic Post UAB Working 1 week		1,7%	★ Tasker				
<input type="checkbox"/> Antonette Coppage Marketing Executive, Interlux UAB Unqualified 2 weeks	+370 600 12345	8%	★ Google Search		July 22, 08:30		
<input type="checkbox"/> Kenneth Walker Consultant, Columbus Motors							



Leads

Adding a Lead

You can add a new Lead manually by pressing “New” in Leads section and filling in fields with required information. Keep in mind, intelligent software will warn you immediately, if data you entered already exists, so you are protected from duplicate records.

companyname.teamgate.com

CREATE NEW LEAD Cancel

Important? No

Contact Name

Find or Create new Company

Title

LEAD STATUS **New**

SOURCE **Unspecified**

TAGS Select or Create Tags

Phone Work

Email Work

ADDRESS

Street, House Number

City State/Region Zip/Postal Code

Country

Tap here to improve search



Leads

Converting Leads

When a Lead is qualified and ready, you can convert it to a Deal with associated contact to it. Converted all Lead's history will be transferred as well.

To convert a Lead, you have several options on how to do it just by single click:

- **Convert the Lead to a Company and/or Person, without any action.** This option means you transfer your Lead with all its information included into a Contact. And since there are no actions planned yet, you can start planning your activity later.
- **Convert the Lead to a Company and/or Person with action planned.** To convert a Lead, you can select the checkbox to add an optional action like task, call or other reminder due date. The new task will appear in Contact's card, in list and in your calendar.
- **Convert a Lead to a Company and/or Person and create new Deal for this Lead.** This option will create a new Deal for your converted Lead. You can add a name, Sales Pipeline and stage for this deal. The associated Contact will be seen as "Prospect" on the list.

Are you sure want to convert **Mindaugas Glinskas**? [Cancel](#)

i Converting a lead will create a person contact and/or company. All tags and other information will be transferred. You should only convert a lead if it is qualified.
Optionally, you can also create a deal and a task for each converted lead.

Create a deal for this converted lead
UAB Golf Development Deal

Create a activity for each converted lead
Task Activity title due 2015 08 14 at 09:00

OWNER Drop-down

CONVERT



Leads

Other lovely details

Benefit for business which do export (Flags)

Companies that operate with clients from different countries will find this additional feature very helpful. There is no need to enter your Lead's card to figure out its country of origin, its flag is located next to the name of a Lead, so you can greet it in its mother tongue!

Source & Conversion Likelihood

The source column is created for your benefit. You can assign where the Lead particularly came from, for example: trade show, networking event, online registration etc. We constantly strive to provide you with more advanced forecasting. Thus, based on a source of the Lead and past interactions with it, software will calculate a likelihood of that Lead converting into a Deal in "Convert %" column.

Manage a Lead

Manage and customise your Leads the way you manage your business. Select **Status** for your Lead: New or Unqualified or add any status you usually use for your Leads nurturing. All unqualified Leads can be recycled and processed again. Add a **Tag** to your lead to remember where the Lead came from or note other specific information. An option of the "**Quick saving**" allows you to quickly save & add new Leads.



Leads

Why is it important to manage your Leads?

Leads qualification is the very first step towards the final sale. After receiving a Lead you enter it as a Lead and start processing its potential. After nurturing, you decide to convert it into a Contact. If the Lead is not qualified, you can “unqualify” it and the Lead will disappear from your active Leads list. Unqualified Leads can be recycled and processed again at any time later.



“Lead management allows to keep your database organized and clear from useless contacts and prevents the mess in your contacts lists.”

Teamgate wisdom.



Organiser

Organise Your Day Efficiently

Adding activities to Deals allows you to track actions taken within particular Lead, Contact or Deal and highlight what else needs to be done next.

Create your own activity type, see it all in your calendar, track plan your day and receive reminders and notifications of delayed tasks.

Manage your activity types in “Settings”

The screenshot displays the Teamgate application interface. A modal window titled "New Activity" is open, allowing the user to create a new activity. The form contains the following fields:

- Activity Type:** CALL
- Call Subject:** Call Subject
- DUE DATE:** 2015-08-15 (with "Time" and "Duration" sub-labels)
- RELATED TO:** UAB Vieni vartai Deal € 175 (Meeting)
- OWNER:** Andrej Jegorov
- REMINDERS:** SMS (15 min) and E-mail (1 hr)

A blue line points from the text "Manage your activity types in 'Settings'" to the "CALL" activity type field.



Organiser

Log a call

Log a call to identify whether a Call was successful or not and see the outcomes in analytics. Analytics section will also highlight the records that have not been processed yet, so you can plan your actions immediately.

Click on phone number and “Log a call”

The screenshot displays the Teamgate CRM interface. At the top, there is a navigation bar with the Teamgate logo and various icons. Below this, there are buttons for 'NEW' and 'IMPORT', and a dropdown menu for 'All Leads'. The main area shows a list of leads with columns for 'Lead', 'Contacts', 'Convert', 'Source', 'Owner', 'Activity', 'Action', and 'Convert'. A call logging menu is overlaid on the list, showing options: 'Log a call', 'Plan a call', 'Log a Call', 'Call via Skype', 'Call via Browser (Coming Soon)', and 'Via Script (Coming Soon)'. The menu is triggered by clicking on the phone number '+370 600 12345' in the first lead row.

Lead	Contacts	Convert	Source	Owner	Activity	Action	Convert
<input type="checkbox"/> Mindaugas Glinskas Director, UAB Golf Development New 15 min	+370 600 12345	8%	★ GetApp		Tomorrow 08:05	...	🔄
<input type="checkbox"/> Audronė Baranauskienė Director, East Island Working 1 h		8,7%	★ Capterra		Never spoke	...	🔄
<input type="checkbox"/> Gintaras Motiejūnas Sales manager, Baltic Post UAB Working 1 week		1,7%	★ Tasker		Last spoke 8/10/12	...	🔄
<input type="checkbox"/> Rima Žvirblienė Marketing Executive, Interlux UAB Unqualified 2 weeks	+370 600 12345	8%	★ Google Search		July 22, 08:30	...	🔄



Organiser

Set an appointment

Invite your team members and related Contacts to a meeting. Set the title, location, time and length, add reminders. All new Appointments can be seen on your calendar or in the Contact card, if it is related to it. Reminders and daily schedule will be received by email or by text.

Invite your team or related contacts

The screenshot shows the 'New Appointment' form in the Teamgate application. The form is divided into two main sections. The left section contains fields for event details: TITLE (Untitled event), WHERE (Enter a location), START (9/14/15, 4:30 pm, 0:30), ALL DAY (No), DESCRIPTION (Enter a description), and PRIVATE EVENT (No). Below these fields is an 'ADD REMINDER' button. The right section shows a list of invitees: Marijus Andrijauskas (Direktorius), Adolis Jančiauskas (Pardavimų vadybininkas), and Kšyštof Gulbinovič (Marketingo specialistas). Below the list are buttons for 'ADD ATTENDEES AND RESURCES', 'ADD DEAL', and 'ADD DEAL'. A blue line points from the text 'Invite your team or related contacts' to the list of invitees.



Deals

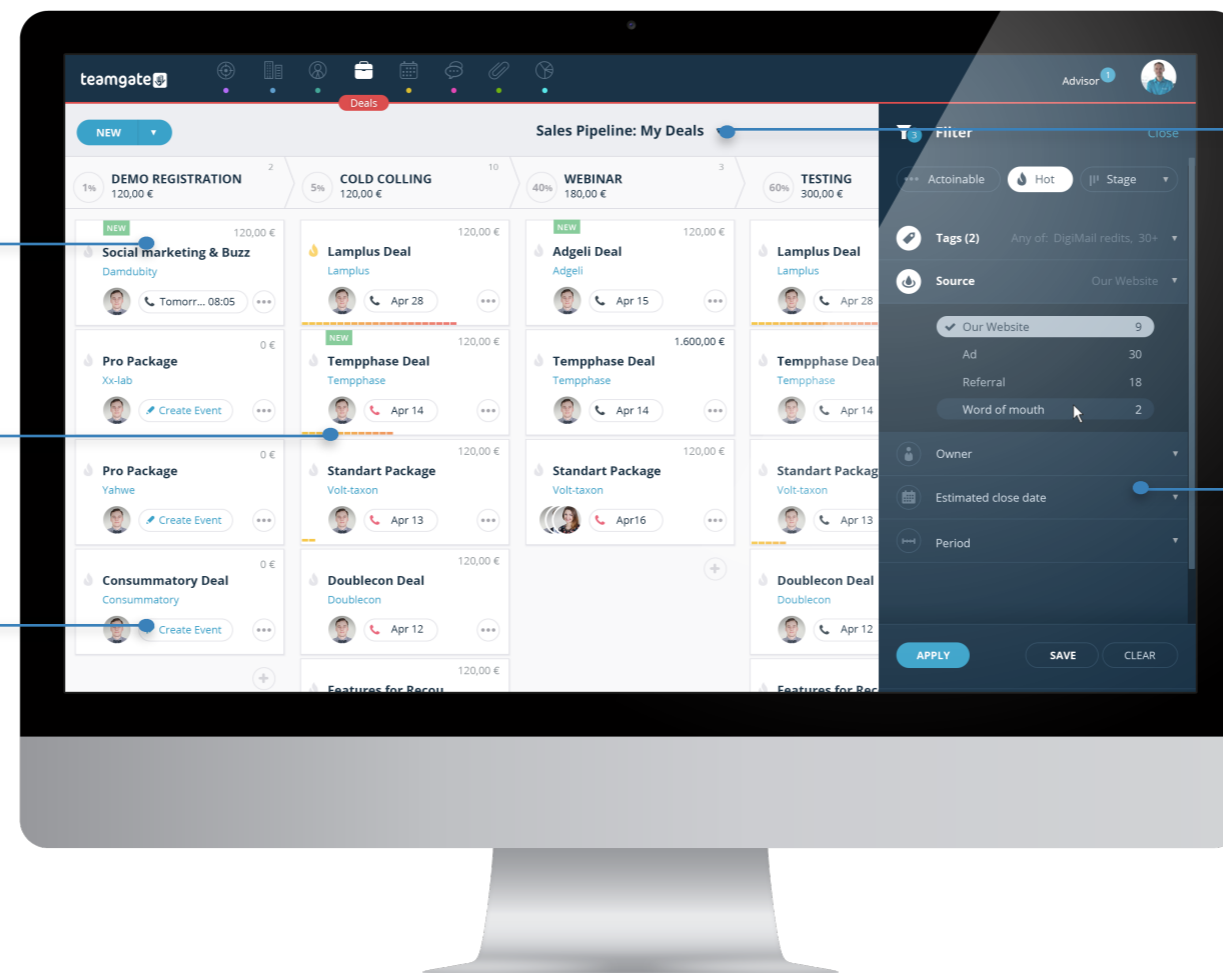
What is a Deal?

A Deal is an entity by which the Journey is tracked through your Sales Pipeline. Each Deal is assigned to its owner or a team. With flexible functions, you can easily filter and manage your Deals or just drag & drop from one sales stage to another. You can see the delay date and if it is likely to be closed. If you want to close the Deal, you can drag it to appearing win/lose line.

Deal card

Closing date

Activity



Multiprocess

Filtering



Deals

Sales Pipeline

Sales pipeline displays all your Deals at each stage of the sale process. It also gives you a clear view of your team performance, as well as highlights areas that need an extra push. Also, you can manage more Pipelines at the same time.

Just “Drag & Drop”

The screenshot displays the Teamgate Sales Pipeline interface. At the top, there's a navigation bar with the Teamgate logo and various icons. Below it, the pipeline is titled "Sales Pipeline: My Deals" and is divided into five stages: DEMO REGISTRATION (1%), COLD COLLING (5%), WEBINAR (40%), TESTING (60%), and CLOSURE (80%). Each stage contains deal cards with details like deal name, value, and status. A deal card for "Tempphase Deal" is highlighted with a red box and a callout indicating it is "22 days late to close the deal". A blue line points from the text "Just 'Drag & Drop'" to the deal card, illustrating the drag-and-drop functionality.

Stage	Deal Name	Value	Status	Due Date
DEMO REGISTRATION	Social marketing & Buzz	120,00 €	NEW	Tomorr... 08:05
COLD COLLING	Lamplus Deal	120,00 €	NEW	Apr 28
WEBINAR	Adgeli Deal	120,00 €	NEW	Apr 15
TESTING	Lamplus Deal	120,00 €	NEW	Apr 14
TESTING	Tempphase Deal	1.600,00 €	NEW	Apr 14
TESTING	Tempphase Deal	120,00 €	NEW	Apr 14
CLOSURE	Standart Package	120,00 €	NEW	Apr 13
CLOSURE	Standart Package	120,00 €	NEW	Apr 16
CLOSURE	Standart Package	120,00 €	NEW	Apr 13



Deals

Deals list

See all your deals in a “List View”, including won and lost Deals. You can plan massive actions, navigate, sort and manage Deals here.

If you are missing some important information about your Deals, you can add some extra fields. Plus, you can add as many sales processes with unlimited stages as you need.

Manage sales process on “settings”

List view

<input type="checkbox"/>	Title	Value	Owner	Close date	Upcoming
<input type="checkbox"/>	USA, Devan Dillard Two Men And A Truck 20%	€60.00		01/10/2015	<input checked="" type="checkbox"/> Today, 17:30
<input type="checkbox"/>	UK, Anke Anke 20%	€22.00		01/10/2015	<input checked="" type="checkbox"/> Sep 22, 10:30
<input type="checkbox"/>	USA, Melissa still inter... The HIT Center 20%	€60.00		31/10/2015	<input checked="" type="checkbox"/> Sep 21, 19:00
<input type="checkbox"/>	MyJobs.com.mm deal MyJobs.com.mm 80%	€440.00		30/09/2015	<input checked="" type="checkbox"/> Sep 24, 10:30



Contacts

People and Companies

You can find two contact sections in Teamgate: People and Companies. Each section holds different type of Contacts, and both are related, too. “Companies” hold all business information, like company name and all information about it. “People” hold individual person’s information, relations, titles and much more.

It is quite easy to add new Company or Person. All you need to do is just to click “New”. Make sure you are not duplicating a Contact, and, if you are, we show you that immediately.

New Companies People

The screenshot shows the Teamgate interface. At the top, there is a dark blue navigation bar with the 'teamgate' logo and several icons. Below this is a light grey header with a 'NEW' button on the left, 'All Companies' in the center, and search, menu, location, and filter icons on the right. The main content area is a table with three columns: 'Company', 'Contacts', and 'Owner Activity'. The table lists three companies: 'Motion Picture Solution...', 'Resource Print Solutions', and 'devere group'. Each company row has a 'Non Customer' dropdown menu. A dropdown menu is open for the 'devere group' row, showing options: 'Non Prospect', 'Lost Prospect', and 'Prospect'. The 'Prospect' option is highlighted. The 'NEW' button and the 'Prospect' option in the dropdown are indicated by blue lines and labels from the text above.

Company	Contacts	Owner Activity
<input type="checkbox"/> Motion Picture Solution... Communications Director, Alastai... Non Customer Non Prospect	+447799677495 alastair.balmain@motionpi...	Sep 28, 15:00
<input type="checkbox"/> Resource Print Solutions Sales & Marketing Director, Asif ... Non Customer Prospect	+440113 200 5000 amc@resource-ps.co.uk	Last spoke Sep 16, 09:54
<input type="checkbox"/> devere group Spencer C... Non Customer Prospect	+41 797212653 sgoodwin244@gmail.com	Today, 14:30



Contacts

Contact card

Each contact has its own Card, including everything related to it, together with notes, emails, calls, and tasks, upcoming events, history and much more. When lead fits with your requirements and becomes qualified, it can be converted to a Contact transferring everything related to the Contact.

Contact details

Activity and history feed

Owner and collaborator

companyname.teamgate.com

teamgate

Leads

Christian Laclair
Director, UAB Golf Development

No Working

Work 214-789-4503

Mobile +370 600 12345

Work francisco.dickerson@L...

Address 3987 Norma Avenue, Conroe, TX 77895

Social f t in

Website www.golfdevelopment.com

Industry Technology

Source Get App 33.3%

Add Note Send Text Message Add Appointment Add Activity

Add your note here...

Upcoming

Tomorrow 15:30 (1 hr) 2015/08/23 1 hr before

Product Presentation Meeting

Yesterday Michael Bullard Elizabeth Fall

Advisor Francisco Dickerson Owner

Deals Details

Spalvoti pieštukai 1000 vnt. komercinis pasiūlymas	1110 Eur
Spalvoti pieštukai 2, 500 vnt. komercinis pasiūlymas	1110 Eur
Total Deal Value	25,000 Eur

Lead Score 65

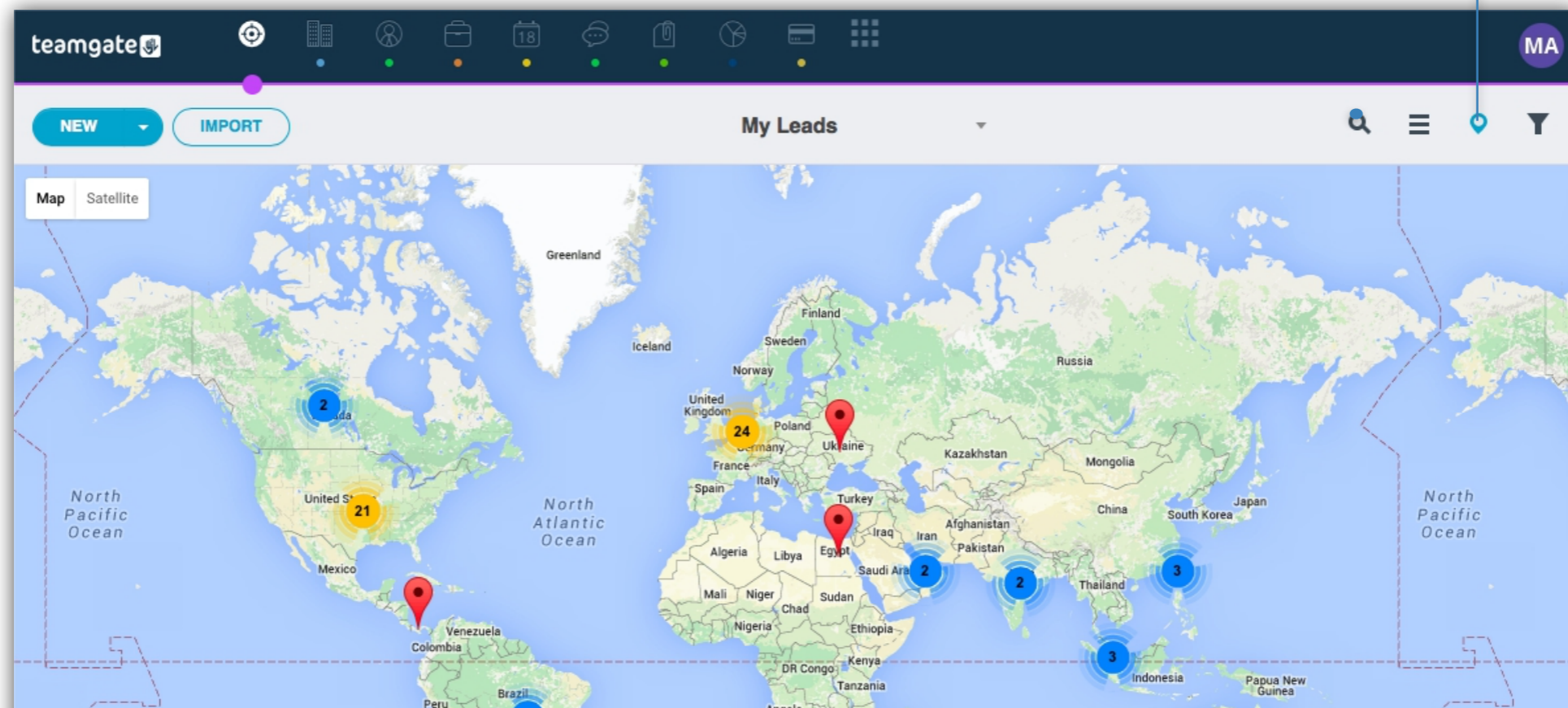


Contacts

Google Maps

Each contact that has an address appears on the Google Map. So you can see the real picture of your customer's map or Lead's traffic direction. You can click on the icon in the map and see the details of that Contact or you can go directly to the Contact card for more information.

Google Maps





Insights

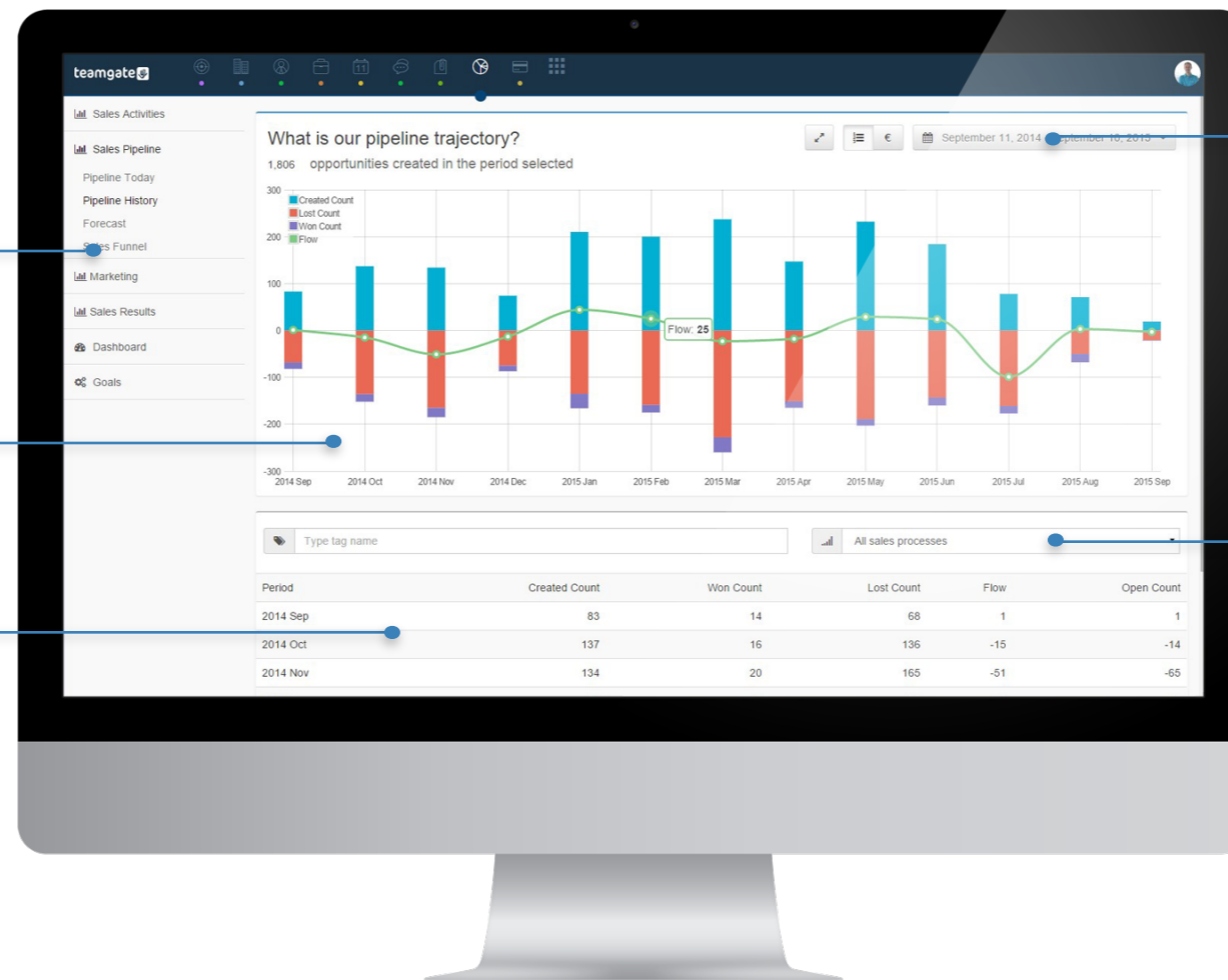
What is Insights?

Data driven intelligent reports provide sales managers with a real time image of their business. By breaking down every single angle of the sales process, manager is able to highlight that particular business areas that require the biggest attention.

Report category

Report chart

Report data table



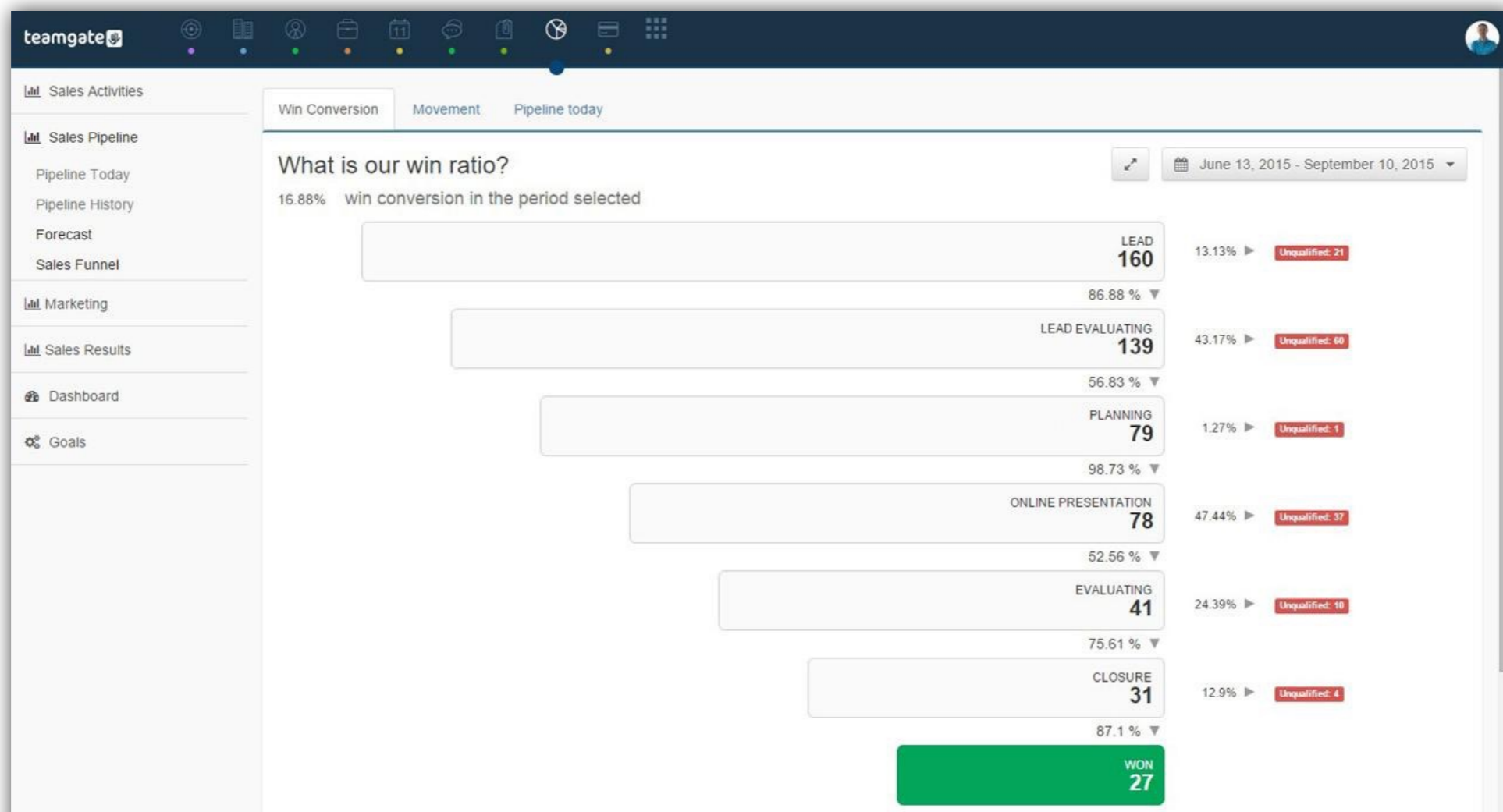
Filter

Tags



Sales Funnel

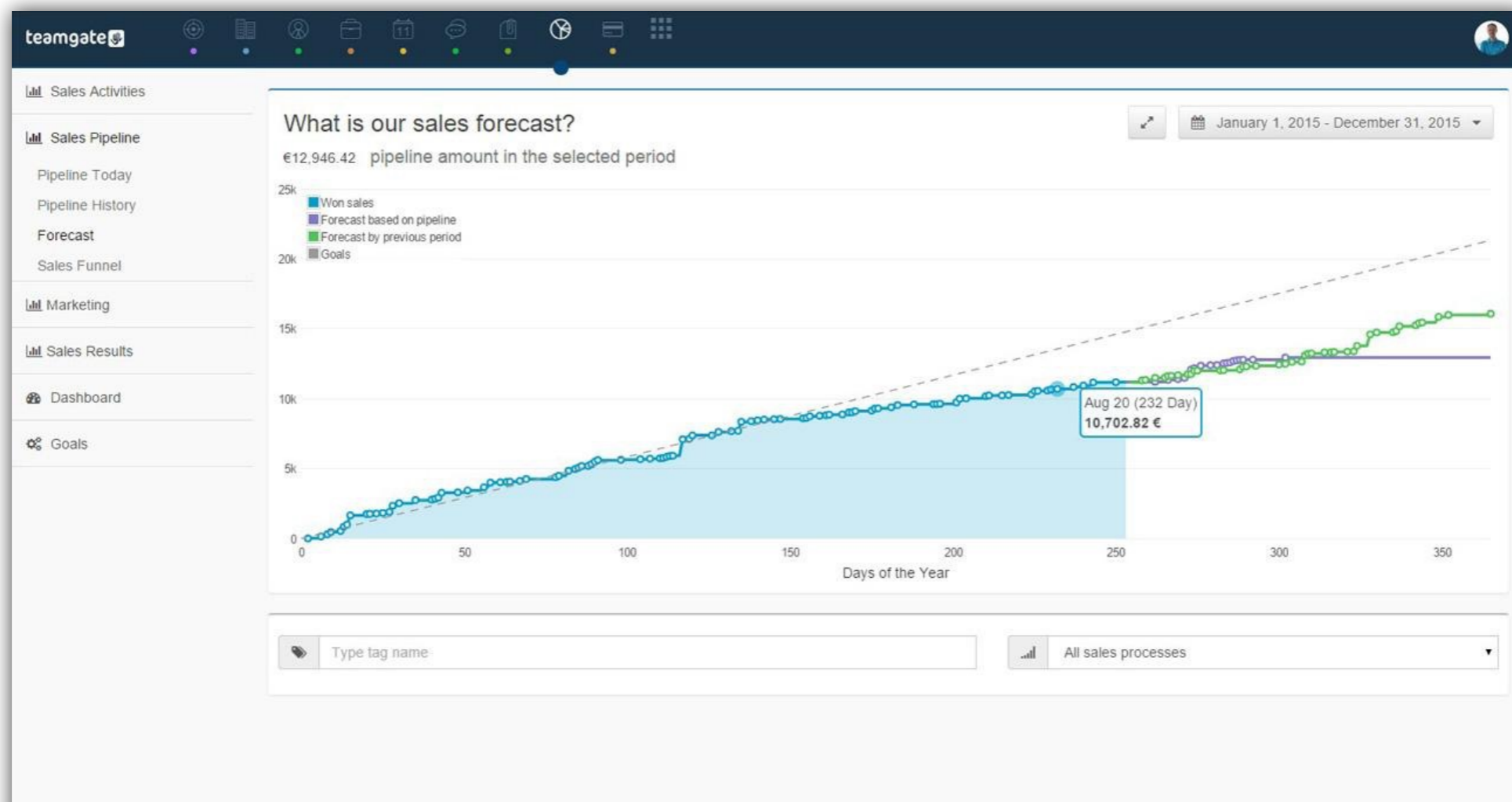
It is a great way to visualise the process of Leads becoming Customers. Sales funnel provides a clear view of sales opportunities available to your sales teams, including number of prospects, total revenue which can be generated by every Deal, flow and win rates.





Forecasting

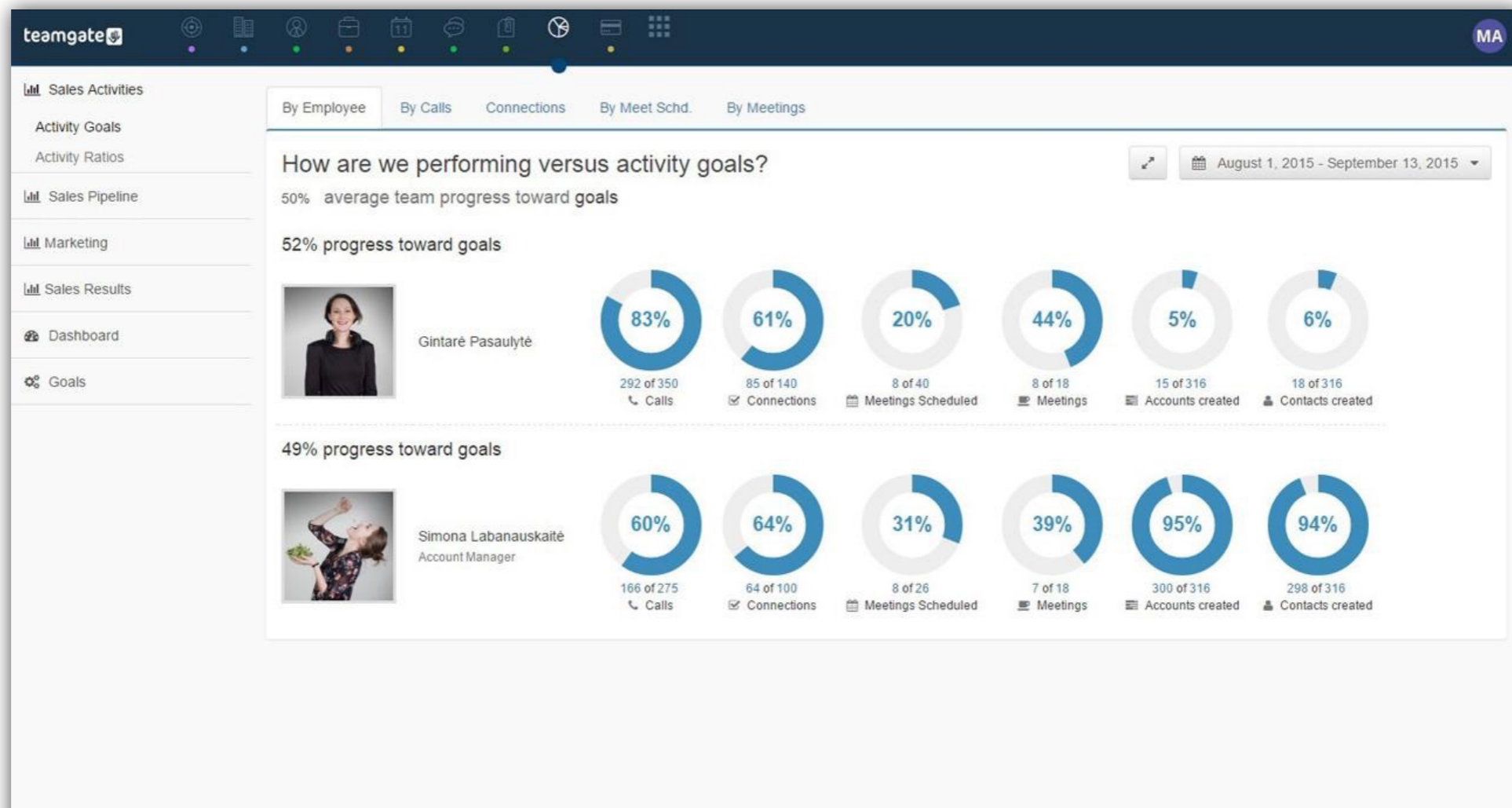
Sales forecasting means picturing a long-term and a short-term sales performance of the company. It is based on success rate of a deal closure at the actual moment in addition to its past sales data. Forecast can be compared to the Goal you set.





Activity Goals

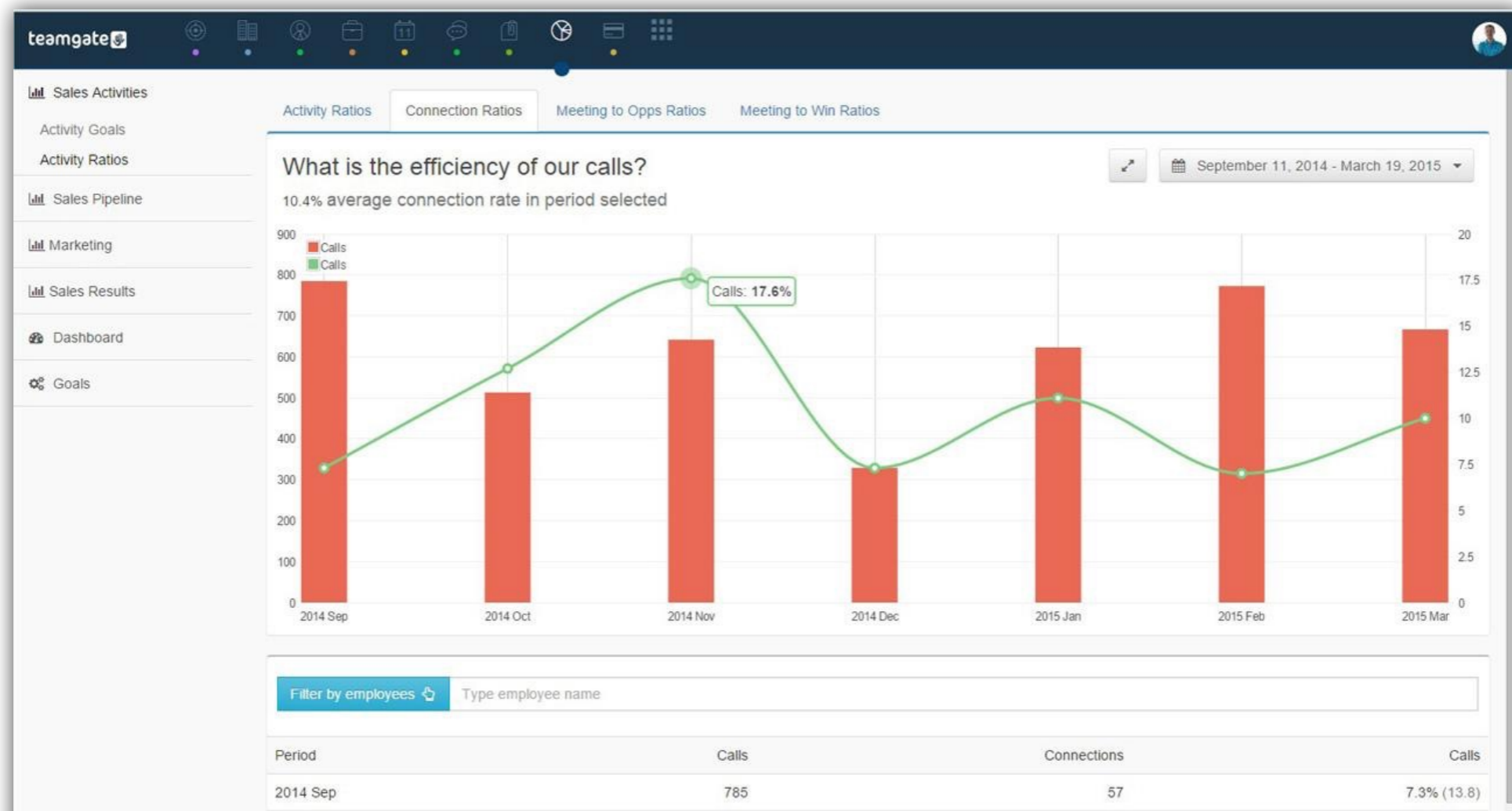
Stay on top of your activity indicators. Individual set up goals will help you to evaluate your own performance and compare it with the performance of your colleagues. No more daily encouragements from your manager. Boost your motivation and stay on top of you planned duties.





Activity Goals

Activity reports are very much valued by the salespeople and executives. The ability to set Goals for various sales activities and compare it with day-to-day performance allows executives to constantly track performance of their teams. In addition, salespeople can compare their activity with their Goals, too.





Teamgate CRM - easy to use, hard to beat.