

ActiveCRM 
+
SUGARCRM



Enhances company productivity through simpler outbound calling, superior relationship monitoring, follow-up activity, lead generation and innovative analytics.

- Call Pop-Ups
- Automatic Call Logging
- CRM Task Creation
- Click to Dial
- Real-Time Analytics
- CRM Records Creation

CALLS

We sync your entire list of inbound and outbound phone calls. ActiveCRM will even tell you who in your company answered the call; we will let you know who spoke to your lead or customer and what they spoke about.

EMAILS

We will sync your last customer emails from SugarCRM. You will never have to guess what the last conversation was! Pick up where you left off and gain more efficiency.

NOTES

Notes taken will be displayed in the Activities Slider. Quickly check your latest notes.

Have the necessary intelligence to close those deals and help customers all from one place!

@MENTIONS

It's easy to share your call notes with team members, just type @ followed by the username (e.g. @john), your call notes and record will get emailed directly to that user; this ensures that important information is not only entered in SugarCRM but also emailed to your teammate.

TASK FOLLOW-UP

Natural language processing lets you type familiar phrases like "follow up next week" and our ActiveCRM will create a task in SugarCRM to remind you to follow up on a specific date!

INDICATORS

ActiveCRM will show a green indicator on the right corner for both @mentions and task follow-ups so that you know what activities will be processed after the call is completed.