



**CRM  
SOFTWARE**

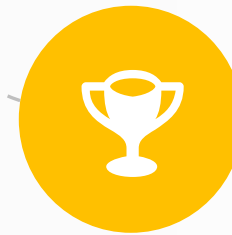
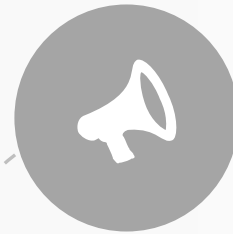


**Research CRM system**

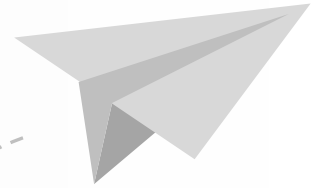


Hones  
t  
Strategi  
c  
**Analysis and  
selection of CRM**

**Presentation and  
comparison**



**Coordination of the CRM  
and further work procedure**



# SEARCH CRITERIA

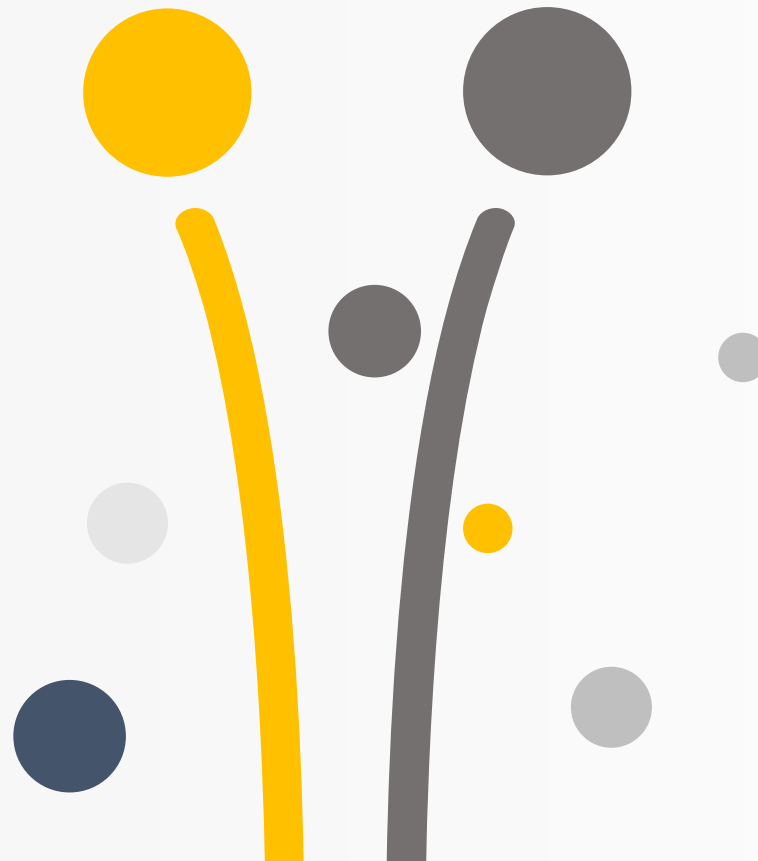
- **CLIENT CARD**
- **FILTERS, TAGS, LABELS**
- **DATABASE STATISTICS**
- **ABILITY TO VISUALIZE STATISTICS**
- **DATA SECURITY**
- **LOCAL SERVER**
- **PRICING**

# Research CRM system

	A	C	D	E	F	G	H	I	J	K	L	M	N
1	Название CRM	Карточка клиента <i>* максимальный функционал, группирование</i>	ОЦЕНКА [1 - 5]	Удобство фильтрации, тегирование, метки	ОЦЕНКА [1 - 5]	Статистика базы данных	ОЦЕНКА [1 - 5]	Возможность визуализации статистики	ОЦЕНКА [1 - 5]	Безопасность данных	Локальный сервер	ОЦЕНКА [1 - 5]	Ценообразование
2	<a href="#">Bitrix 24</a>	Удобная карточка с максимальным функционалом	5	Возможность настраивать тегирование и метки под любые запросы	5	Есть вывод статистики по тегированию	5	Полная визуализация данных	5	Да	1	5	0 - 1000 \$
3	<a href="#">Mondaysales CRM</a>	Удобная карточка с максимальным функционалом	5	Возможность настраивать тегирование и метки под любые запросы	4	Есть вывод статистики по тегированию	5	Полная визуализация данных	5	Нет	0	4	Зависит от подключенного пакета услуг
4	<a href="#">Green Rope</a>	Неудобная карточка клиента, ориентирована на продажи	2	Настраиваемое тегирование и метки	2	Есть статистика	4	Полная визуализация данных	5	Нет	0	3	Очень дорого, цена зависит от количества пользователей
5	<a href="#">Hub Spot</a>	Есть карта, функционал не известен	3	Нет возможности настраивать	2	Можно выводить статистику пользователей	2	Подробная визуализация	3	Нет	0	3	С полным функционалом дорого. Зависит от пакета и количества пользователей
6	<a href="#">Pipedrive</a>	Удобная карта, широкий формат настройки	4	Нет возможности настраивать	3	Есть статистика, не особо широкая, можно настраивать	5	Есть возможность визуализации, достаточно простые графики	3	Нет	0	3	С полным функционалом
7	<a href="#">Oracle Net Suite</a>	<i>* Нет возможности ознакомиться до регистрации !!!</i>	1	Нет возможности настраивать	3	Есть статистика	4	Полная визуализация данных	5	Нет	0	2	Очень дорого, цена зависит от количества пользователей
8	<a href="#">AMO CRM !!!</a>	Неудобная карточка клиента, ориентирована на продажи	4	Настраиваемое тегирование и метки	4	Есть статистика, не особо широкая, можно настраивать	1	Есть возможность визуализации, достаточно простые графики	3	Нет	0	2	С полным функционалом
9	<a href="#">Click Up !!!</a>	Есть карта, функционал не известен	1	Возможность настраивать тегирование и метки под любые запросы	1	Есть статистика	1	Есть возможность визуализации, достаточно простые графики	1	Да	0	1	
10	<a href="#">Perfex</a>	Неудобная карточка клиента, ориентирована на продажи	3	Нет возможности настраивать	2	Есть статистика, не особо широкая, можно настраивать	2	Есть возможность визуализации, достаточно простые графики	3	Нет	0	3	С полным функционалом
11	<a href="#">Pulse Technology CRM</a>	Есть карта, функционал не известен	4	Настраиваемое тегирование и метки	3	Есть статистика	4	Полная визуализация данных	5	Нет	0	2	Очень дорого, цена за
12	<a href="#">NetSuit</a>	<i>* Нет возможности ознакомиться до регистрации !!!</i>	1	Нет возможности настраивать	3	Нет статистики	2	Полная визуализация данных	4	Нет	0	1	Очень дорого, цена зависит от количества пользователей
13	<a href="#">eWay-CRM</a>	Удобная карта, широкий формат настройки	3	Настраиваемое тегирование и метки	2	Нет статистики	1	Есть возможность визуализации, достаточно простые графики	5	Нет	0	3	Очень дорого, цена за

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**Bitrix24** 



# Displaying CRM Leads

The screenshot displays the Bitrix24 CRM interface. At the top, there is a navigation bar with the Bitrix24 logo, a search bar, the time 13:20, and user information for Максим Зиборов. Below this is a secondary navigation bar with tabs for Deals, Inventory, Customers, Sales, Analytics, Add-ons, Settings, and More. The main section is titled 'Contacts' and includes a '+ ADD' button and a search filter. There are two tabs: 'For today' (0) and 'Overdue' (0). The main content is a table of contacts with the following columns: Contact, Activity, Responsible, Created, Customer journey, English?, PPSN, Male, Female, Another gender, and information processing agreement. The table contains four rows of data. Below the table, there is a summary bar showing 'SELECTED: 0 / 4', 'TOTAL: SHOW QUANTITY', 'PAGES: 1', and 'RECORDS: 20'. At the bottom, there are action buttons: DELETE, EDIT, START DIALING, SELECT ACTION, and FOR ALL. The footer includes the Bitrix24 logo, language selection (English), copyright information (© 2022 Bitrix24), and links for Implementation request, Themes, and Print.

Contact	Activity	Responsible	Created	Customer journey	English?	PPSN	Male	Female	Another gender	information processing agreement
Oleg Clients	No activities	Sokrat Chakalov	30/08/2022		no		no	no	no	no
Den Chakalov Clients	07/09/2022 19:00 CRM: Den Chakalov for Sokrat Chakalov	Sokrat Chakalov	21 minutes ago		yes		no	no	no	yes
Sokrat Chakalov Suppliers	No activities	Sokrat Chakalov	29/08/2022		yes	35	yes	yes	no	no
Maxim Ziborov Clients	No activities	Sokrat Chakalov	29/08/2022		yes	47	yes	yes	no	no

# Displaying CRM Leads

## CRM ★

Add board description

/ 0

/ 0

Start Zoom call

/ 1

Activities / 0

⋮

☰ Main Table ▾

New Item ▾

Search / Filter Board

👤

🔍

☰

Incoming leads

☰ Subitems

↶ Sales per...

↶ Negotiation

↶ Plan

↔

Company size

	POC	Email	Address	Phone	World Clock
Nike <span style="font-size: 18px;">💬</span>	Alex	lea@monday.com	New York, NY, ...	+39 331 ...	01:21 PM
Adidas <span style="font-size: 18px;">💬</span>	Julia	shelly@monday.co...	Greece	+30 21 0...	02:21 PM
Netflix <span style="font-size: 18px;">💬</span>	Mike	justin@monday.co...	Hawaii, USA	+1 203 4...	01:21 AM
Levis <span style="font-size: 18px;">💬</span>	Kelly	lisa@monday.com	France	+33 1 43 ...	01:21 PM
Amazon <span style="font-size: 18px;">💬</span>	Nate	lindsay@monday.c...	Berlin	+353 1 6...	04:21 AM
+ Add					

Active leads

☰ Subitems

↶ Sales per...

↶ Negotiation

↶ Plan

↔

Company size

	POC	Email	Address	Phone	World Clock
Facebook <span style="font-size: 18px;">💬</span>	James	laura@monday.co...	Madrid	+33 1 43 ...	01:21 PM
Zoom <span style="font-size: 18px;">💬</span>	Casey	bradley@monday.c...	London	+1 203 4...	04:21 AM
Slack <span style="font-size: 18px;">💬</span>	Will	noa@monday.com	Dublin	+1 203 4...	05:21 AM
Sony <span style="font-size: 18px;">💬</span>	Gemma	tom@monday.com	Prague	+420 608...	05:21 PM
Apple <span style="font-size: 18px;">💬</span>	John	effie@monday.com	Rome	+39 06 6...	05:21 AM

# Client's card

The screenshot displays the Bitrix CRM interface for a client card. The client's name is **Den Chakalov**. The card is categorized as a **LEAD** and includes the following details:

- DOB:** 06/08/1993
- Profession:** Web designer
- telephone number:** 412412412412 (Mobile)
- E-mail:** FU@gmail.com (Work)
- Messenger:** 085 937 9993 (Telegram)
- Employer:** Lidl (Contact companies)
- Address:** Castle Road, Kilkenny Castle, R95 HY09 Kilkenny

At the top right, there are navigation buttons for **SCRIPTS**, **DOCUMENTS**, and communication tools like **Call**, **Zoom**, **Meeting**, **Visit**, **E-mail**, **SMS**, and **Task**. The **Task** and **Call** buttons are highlighted with red boxes.

The main content area shows a **Comment** section with a text input field and a **Planned** task list:

- Task tomorrow, 19:00:** CRM: Den Chakalov, Phone call about courses for "web designer", With: Den Chakalov

Below the task list, there are several activity logs:

- Task created: CRM: Den Chakalov 10:58:** Phone call about courses for "web designer"
- Added CRM item link 10:52:** Company: Lidl
- Contact created 10:43:** Den Chakalov

The interface also features a sidebar with navigation options like **Deals**, **Inventory**, and **Contacts**, and a bottom navigation bar with **DELETE** and **EDIT** options.



# Client's card

## Contacts

Welcome to your contacts board! Here you can store and manage all of your contacts

Main Table | Cards | Kanban | + Add View

New Contact | Search | Person | Filter | Sort | [Icons]

### Primary Contacts

	Accounts	Deals	Title	Type
Phoenix Levy	HSBF	Deal name 3	COO	Custom
Madison Doyle	Bindeer Inc.	Deal name 1 +1	CEO	Custom
Leilani Krause	Pear inc	Deal name 2 +1	CIO	Partne
Harry Potter	Potter & co	Harry Potter	COO	Qualified

+ Add Contact

+ Add new group

## Harry Potter

Overview | Updates | Files | Activity Log | More | + Add View

Add widget | Give feedback

### Emails & Activities

Send email | + Add activity | Feedback

April 2022

28 Apr, 16:45 PM

Note was ad...  
Prefers to schedule meetings on

### Contact info

Name: Harry Potter

Accounts: Potter & co

Deals: Harry Potter

Title:

### Related accounts

Accounts: Add items

### Companies

	Type	Priority	Indus
Potter & co	Client		

+ Add


# Filters

The screenshot displays a CRM application interface with a 'Filters' modal open. The main navigation bar includes 'Deals', 'Inventory', 'Customers', 'Sales', 'Analytics', 'Add-ons', 'Settings', and 'More'. The 'Contacts' section is active, showing a list of contacts and a 'Filter and search' bar. The filter modal is titled 'FILTERS' and contains the following fields:

- First name
- Last name
- Phone
- Email
- Responsible person
- Date of birth (with a dropdown menu showing 'Any date')

At the bottom of the modal, there is a red-bordered button labeled 'Add field' and a link 'Restore default fields'. The modal also features a 'SEARCH' button and a 'RESET' button. The background shows a list of contacts with columns for gender (Male, Female, Another gender) and other attributes.

# Filters






**Graphic Requests** ⓘ ☆ Last seen  Invite / 1 ↗ Activity + Add to board ⋮

All of our new and completed requests.

Main Table Form + Add View Integrate Automate / 1 ^

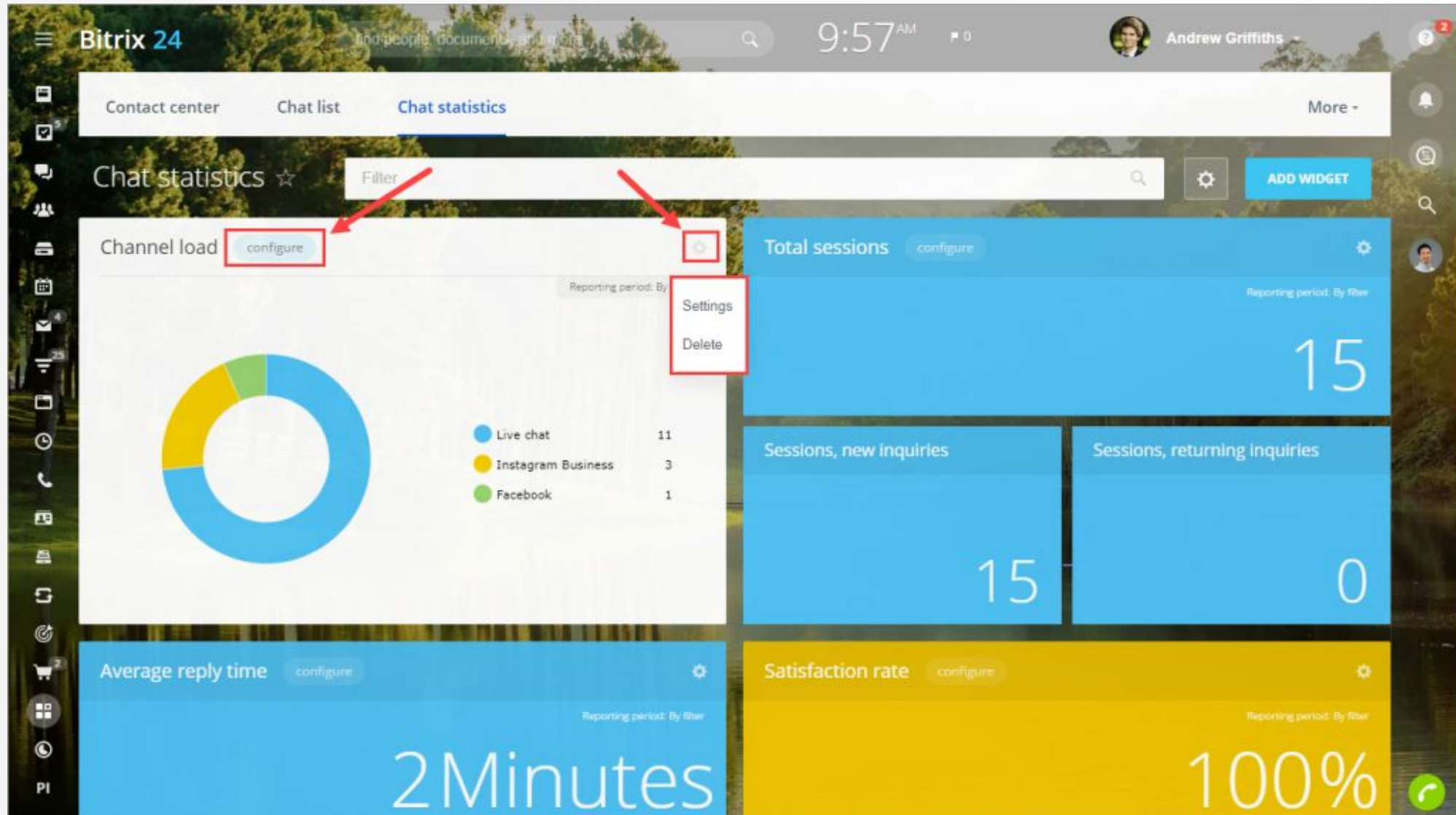
New Item Search Person Filter / 2 Sort ↕ ⚙️ ↻

**Quick filters** Showing 3 of 8 items ⓘ Clear all Save as new view

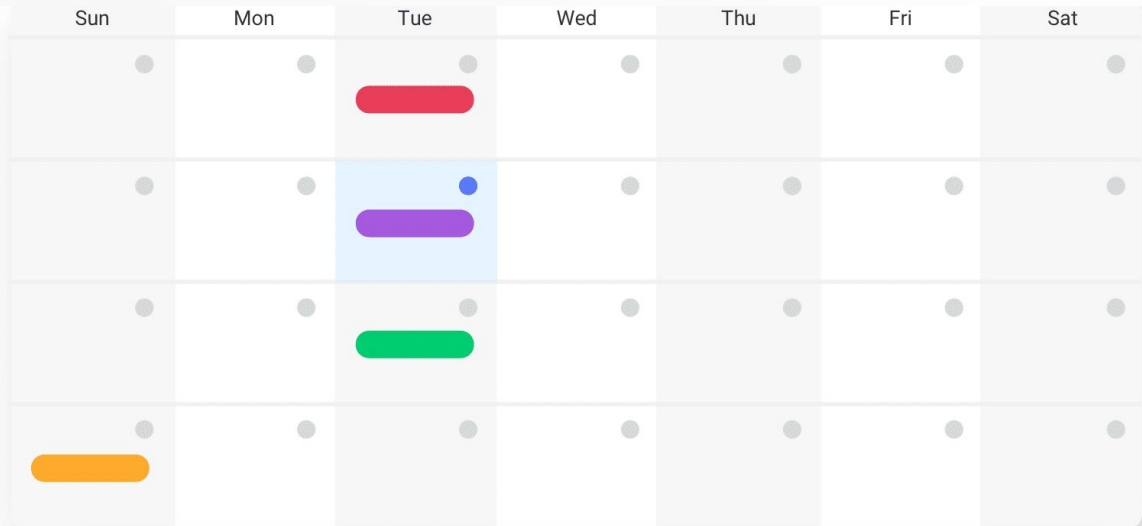
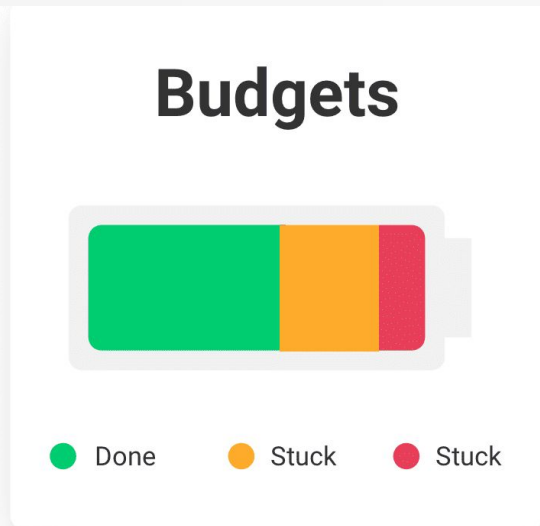
Group	Name	People / 1	Priority / 1	Status
Top group 2	Take Marketing d...	 Noy 3	<input checked="" type="radio"/> High 3	<input checked="" type="radio"/> Working on it
New Requests 2	Change backgrou...	 Jess 1	<input type="radio"/> Low	<input checked="" type="radio"/> Done
Complete Reque... 1	Alter the lighting 1	 Cassandra	<input checked="" type="radio"/> Medium	<input checked="" type="radio"/> Stuck
	Add floral pattern	 Ariel 1	<input type="radio"/> Blank	<input checked="" type="radio"/> In progress
	Enhance design... 1	 Unassigned		<input checked="" type="radio"/> NA
	Turn headshots i			<input type="radio"/> Blank

Switch to advanced filters

# Visualization of information and display of statistics



# Visualization of information and display of statistics

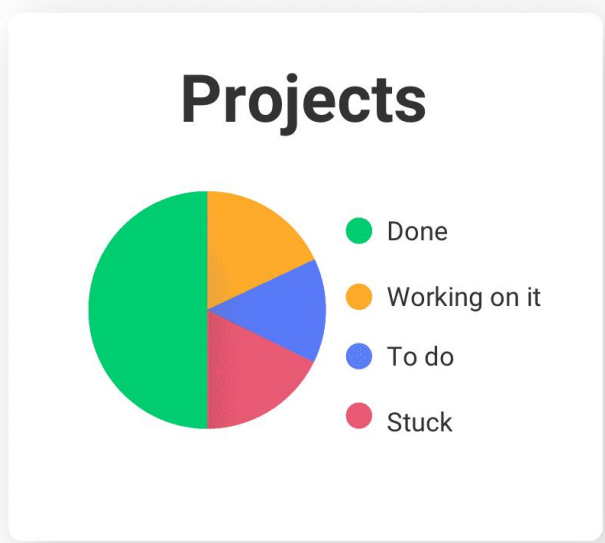


### Urgent

	Person	Brief	Design	Execute	Timeline	
Logo & Brand assets		Done	Done	Working on it		
Web redesign		Done	Done	Stuck		
Banners Design		Done	Stuck			

### High Priority

	Person	Brief	Design	Execute		
First article						
FB campaign						
New landing page design						



# Safety

What makes Bitrix24 **better than 99%** of other solutions on the market?

- ✔ Replaces all your current SaaS solutions
- ✔ Free forever for unlimited users
- ✔ Easy to migrate your data from other systems
- ✔ Integrated with all your favorite services and apps
- ✔ Used, loved, and trusted by 10,000,000+ users worldwide
- ✔ **100% flat fee:** predictable costs, no per-user pricing

START FOR FREE



# Safety



## Bitrix24 On-Premise Edition

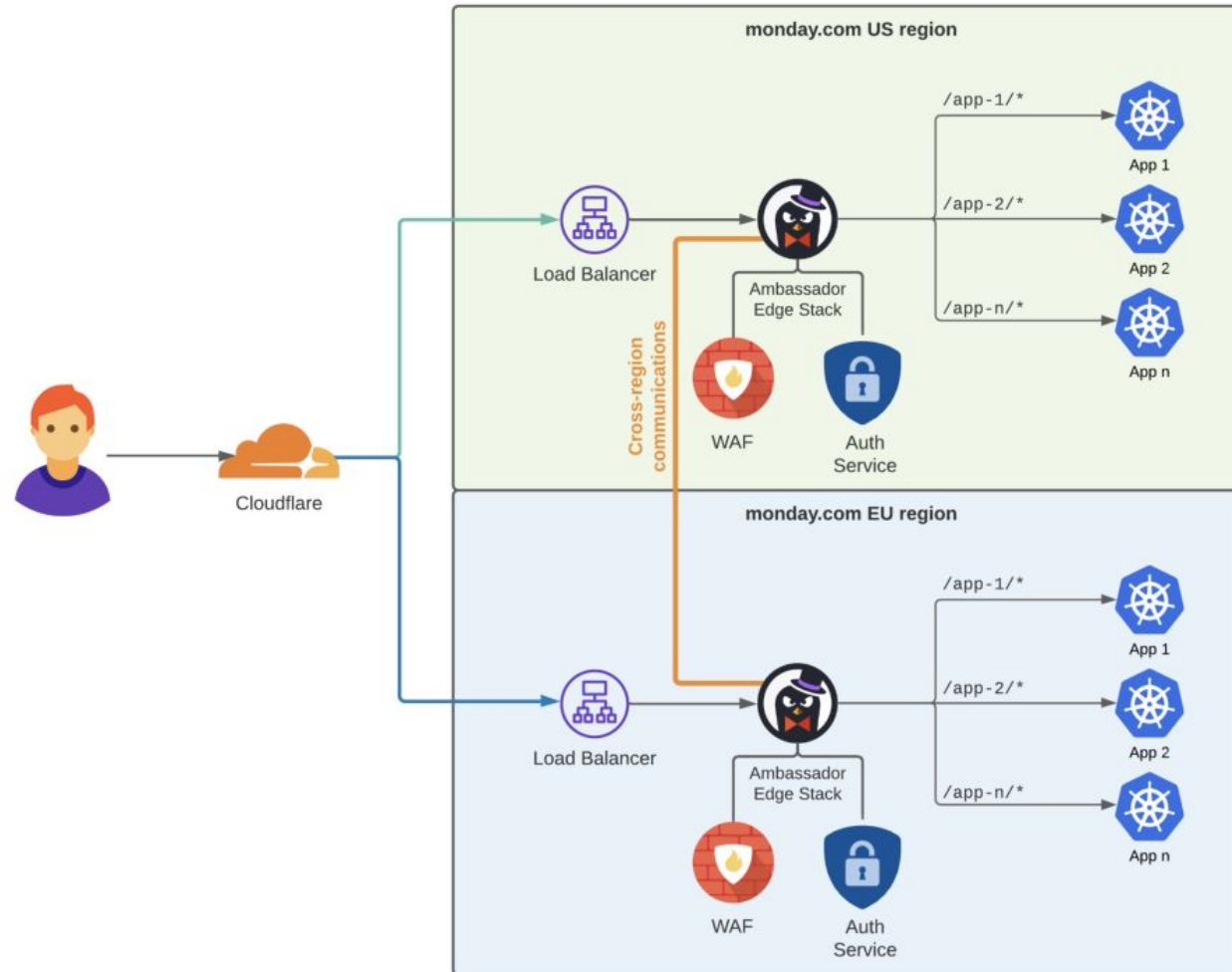
- ✓ Increased service performance and speed
- ✓ Hosted on your own server
- ✓ Enhanced security settings
- ✓ Fully customizable: fonts, colors, menus, texts, source code, etc.
- ✓ Easily scalable
- ✓ 100+ third-party integrations

[LEARN MORE](#)

# Safety

 monday.com

Confidentiality level: public





# Prices

Free	Basic	Standard	Professional	Enterprise
Start working online and sell more with CRM	Effective collaboration for small businesses and sales teams	Advanced collaboration for your entire company and workgroups	Maximum sales and business process automation	Digital transformation tools for large businesses and enterprises
<p><b>Unlimited users</b></p> <p>100% free</p> <p><b>REGISTER FREE</b></p> <p><b>5 GB</b></p>	<p><b>5 users</b></p> <p><del>61 €/mo</del> <b>49 €/mo</b> <small>-20%</small></p> <p>for all users</p> <p><b>BUY</b></p> <p><b>24 GB</b></p>	<p><b>50 users</b></p> <p><del>124 €/mo</del> <b>99 €/mo</b> <small>-20%</small></p> <p>for all users</p> <p><b>BUY</b></p> <p><b>100 GB</b></p>	<p><b>100 users</b></p> <p><del>249 €/mo</del> <b>199 €/mo</b> <small>-20%</small></p> <p>for all users</p> <p><b>BUY</b></p> <p><b>1.024 GB</b></p>	<p><b>250 users</b></p> <p><del>499 €/mo</del> <b>399 €/mo</b> <small>-20%</small></p> <p>for all users</p> <p><b>BUY</b></p> <p><b>3 TB</b></p>
<p><b>Collaboration</b> <input type="checkbox"/></p> <p>Chat</p> <p>HD Videocalls</p> <p>Calendar</p> <p>Company workspace</p> <p>Feed</p> <p>Knowledge base</p>	<p><b>Collaboration</b> <input checked="" type="checkbox"/></p> <p>Chat</p> <p>HD Videocalls</p> <p>Calendar</p> <p>Company workspace</p> <p>Feed</p> <p>Knowledge base</p>	<p><b>Collaboration</b> <input checked="" type="checkbox"/></p> <p>Chat</p> <p>HD Videocalls</p> <p>Calendar</p> <p>Company workspace</p> <p>Feed</p> <p>Knowledge base</p>	<p><b>Collaboration</b> <input checked="" type="checkbox"/></p> <p>Chat</p> <p>HD Videocalls</p> <p>Calendar</p> <p>Company workspace</p> <p>Feed</p> <p>Knowledge base</p>	<p><b>Collaboration</b> <input checked="" type="checkbox"/></p> <p>Chat</p> <p>HD Videocalls</p> <p>Calendar</p> <p>Company workspace</p> <p>Feed</p> <p>Knowledge base</p>
<p><b>Tasks &amp; projects</b> <input type="checkbox"/></p> <p><b>CRM</b> <input type="checkbox"/></p> <p><b>Drive</b> <input type="checkbox"/></p> <p><b>Contact Center</b> <input type="checkbox"/></p> <p><b>Website builder</b> <input type="checkbox"/></p>	<p><b>Tasks &amp; projects</b> <input checked="" type="checkbox"/></p> <p><b>CRM</b> <input checked="" type="checkbox"/></p> <p><b>Drive</b> <input checked="" type="checkbox"/></p> <p><b>Contact Center</b> <input checked="" type="checkbox"/></p> <p><b>Website builder</b> <input checked="" type="checkbox"/></p> <p><b>Online store</b> <input checked="" type="checkbox"/></p>	<p><b>Tasks &amp; projects</b> <input checked="" type="checkbox"/></p> <p><b>CRM</b> <input checked="" type="checkbox"/></p> <p><b>Drive</b> <input checked="" type="checkbox"/></p> <p><b>Contact Center</b> <input checked="" type="checkbox"/></p> <p><b>Website builder</b> <input checked="" type="checkbox"/></p> <p><b>Online store</b> <input checked="" type="checkbox"/></p> <p><b>Marketing</b> <input checked="" type="checkbox"/></p> <p><b>Online documents</b> <input checked="" type="checkbox"/></p>	<p><b>Tasks &amp; projects</b> <input checked="" type="checkbox"/></p> <p><b>CRM</b> <input checked="" type="checkbox"/></p> <p><b>Drive</b> <input checked="" type="checkbox"/></p> <p><b>Contact Center</b> <input checked="" type="checkbox"/></p> <p><b>Website builder</b> <input checked="" type="checkbox"/></p> <p><b>Online store</b> <input checked="" type="checkbox"/></p> <p><b>Marketing</b> <input checked="" type="checkbox"/></p> <p><b>Online documents</b> <input checked="" type="checkbox"/></p> <p><b>Sales Intelligence</b> <input checked="" type="checkbox"/></p> <p><b>Automation</b> <input checked="" type="checkbox"/></p> <p><b>HR</b> <input checked="" type="checkbox"/></p>	<p><b>Tasks &amp; projects</b> <input checked="" type="checkbox"/></p> <p><b>CRM</b> <input checked="" type="checkbox"/></p> <p><b>Drive</b> <input checked="" type="checkbox"/></p> <p><b>Contact Center</b> <input checked="" type="checkbox"/></p> <p><b>Website builder</b> <input checked="" type="checkbox"/></p> <p><b>Online store</b> <input checked="" type="checkbox"/></p> <p><b>Marketing</b> <input checked="" type="checkbox"/></p> <p><b>Online documents</b> <input checked="" type="checkbox"/></p> <p><b>Sales Intelligence</b> <input checked="" type="checkbox"/></p> <p><b>Automation</b> <input checked="" type="checkbox"/></p> <p><b>HR</b> <input checked="" type="checkbox"/></p>

# Prices

## On-premise pricing

Edition

USERS

- BUY
- ORDER FROM PARTNERS

Business

50 100 250 500

2.990 €

TRY FOR FREE

Enterprise

1000 5000

24.990 €

TRY FOR FREE

Subscription renewals

GET RENEWALS

Edition Upgrades

GET UPGRADES

Telephony

CHECK RATES / BUY CREDITS

If you represent a non-profit organization or an educational institution, your company may be eligible for a discount. Find out more information on the [Discounts & Special Offers](#) page.



# Prices

Individual CRM	Basic CRM	Standard CRM <span>Most Popular</span>	Pro CRM	Enterprise CRM
<p>€0 <small>free forever</small></p> <p>Up to 2 seats</p> <p><a href="#">Try for free</a></p> <p>Store and visualize your own contacts</p>	<p>€10 <small>seat / month</small></p> <p>Total €30 / month Billed annually</p> <p><a href="#">Try for free</a></p> <p>Organize all your team's leads, contacts, &amp; deals</p>	<p>€14 <small>seat / month</small></p> <p>Total €42 / month Billed annually</p> <p><a href="#">Try for free</a></p> <p>Automate sales processes and streamline communication</p>	<p>€24 <small>seat / month</small></p> <p>Total €72 / month Billed annually</p> <p><a href="#">Try for free</a></p> <p>Gain insights into your entire sales cycle and forecasting</p>	<p><a href="#">Contact sales</a></p> <p>Manage pre- to post-sales with enterprise-level features</p>
<ul style="list-style-type: none"><li>Up to 2 team members ⓘ</li><li>Up to 1,000 contacts ⓘ</li><li>Web forms to capture leads ⓘ</li></ul>	<ul style="list-style-type: none"><li>Unlimited customizable pipelines ⓘ</li><li>Unlimited contacts ⓘ</li><li>Unlimited boards ⓘ</li><li>Templates for lead, contact &amp; deal management ⓘ</li><li>iOS &amp; Android apps ⓘ</li><li>Unlimited free viewers ⓘ</li><li>Create a dashboard based on 1 board ⓘ</li></ul>	<ul style="list-style-type: none"><li>Advanced account, contact, &amp; deal management ⓘ</li><li>2-way email integration with Gmail and Outlook ⓘ</li><li>Activity management ⓘ</li><li>Quotes &amp; invoices ⓘ</li><li>Merge duplicate data ⓘ</li><li>Custom CRM automations (250 actions per month) ⓘ</li><li>Custom CRM integrations (250 actions per month) ⓘ</li><li>Create a dashboard that combines 5 boards ⓘ</li></ul>	<ul style="list-style-type: none"><li>Sales forecasting ⓘ</li><li>Email tracking &amp; automations ⓘ</li><li>Google Calendar sync ⓘ</li><li>Sales analytics ⓘ</li><li>Customizable email signatures ⓘ</li><li>Custom CRM automations (25,000 actions per month) ⓘ</li><li>Custom CRM integrations (25,000 actions per month) ⓘ</li><li>Create a dashboard that combines 10 boards ⓘ</li></ul>	<ul style="list-style-type: none"><li>Lead scoring ⓘ</li><li>Team goals ⓘ</li><li>Advanced analytics (dashboards up to 50 boards) ⓘ</li><li>Account management ⓘ</li><li>Documents for sales ⓘ</li><li>Enterprise-scale automations &amp; integrations ⓘ</li><li>Enterprise-grade security &amp; governance ⓘ</li><li>Multi-level permissions ⓘ</li><li>HIPAA Compliance ⓘ</li></ul>

[Questions?](#)



**THANK YOU  
FOR YOUR  
ATTENTION!**

