

Adding Contacts for Sales Enablement



Add contacts manually, import them from a .csv file, web forms, or sync contact data from other apps.

Custom Fields for Sales Enablement

Add custom fields to contacts, companies, deals and cases in your Agile dashboard and add values to them



Tags for Sales Enablement



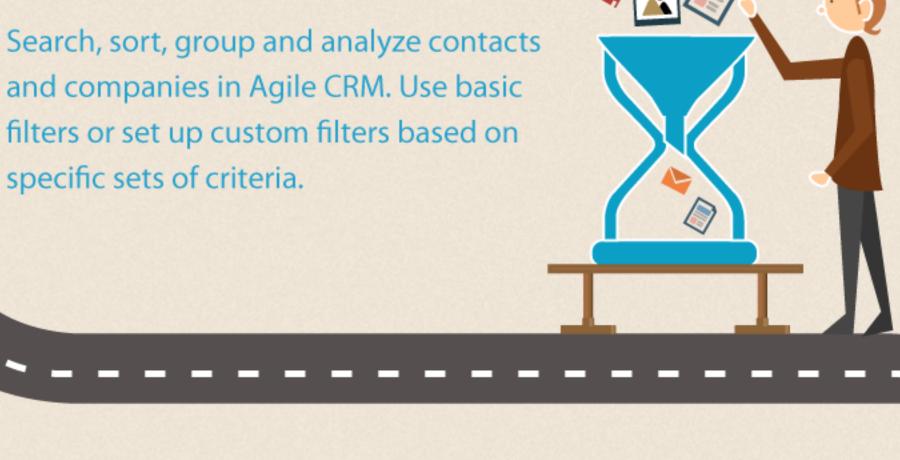
filtering to pull up different reports and trigger campaigns easily.

Tag your contacts to facilitate seamless

Filters for Sales Enablement

filters or set up custom filters based on specific sets of criteria.

and companies in Agile CRM. Use basic



Add/remove tags, add to campaigns, start campaigns, send Emails and lots more in a single bulk action.

Bulk Actions for Sales Enablement



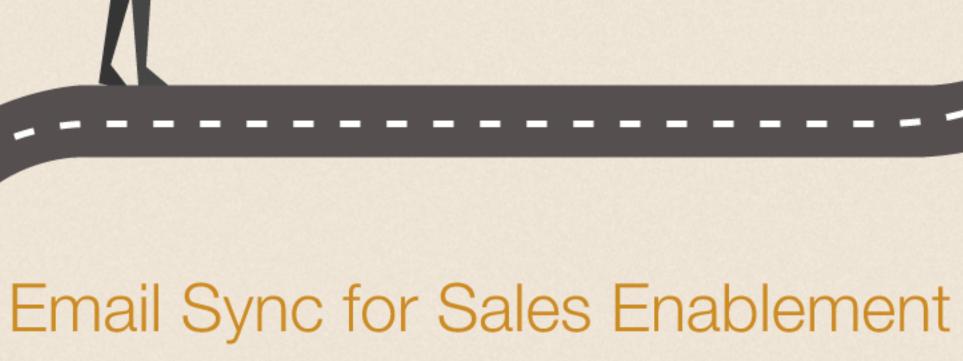
Share your calendar online, create a personal



scheduling page, add the calendar to your Make website and include an appointment an apponintment scheduling link in emails/campaigns.

Sales Enablement





Sync your email accounts with Agile. This gives you a

centralized (Agile) dashboard view of all the emails

Get routed to specific contacts pages

when you add a contact manually or

search for a contact on Agile.

you have exchanged with your Contacts from your Gmail/IMAP/ Office 365 accounts.

Calendar sync for Sales Enablement

Sync all your events from Google Calendar to Agile and vice-versa.

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Add contacts, description, monetary

Deals for Sales Enablement





value and timeline to deals and track them.