

Pipeliner CRM – Business Plans Comparison

	STARTER	BUSINESS	ENTERPRISE
Target Group	Basic sales management, tracking and collaboration	Full CRM functionality, advanced reporting, customization and unique productivity features	Full CRM functionality with advanced customization, integrations and services
Pricing	\$25 /user/month (billed annually)	\$65 /user/month (billed annually)	\$125 /user/month (billed annually)
Users	Up to 5 users	Unlimited but with a 3 user minimum	Unlimited but with a 3 user minimum
Storage	2 GB	5 GB	200 GB
RECORDS MANAGEMENT			
Accounts Management	✓	✓	✓
Contacts Management	✓	✓	✓
Leads Management	✓	✓	✓
Opportunities Management	✓	✓	✓
Accounts, Contacts, Leads, Opportunities Limit	Unlimited	Unlimited	Unlimited
Tasks Management	✓	✓	✓
Appointments Management	✓	✓	✓
Tasks, Appointments Limit	Unlimited	Unlimited	Unlimited
Document Management	✗	✓	✓
Notes Management	✗	✓	✓
Feeds (Built-in Internal Messaging)	✓	✓	✓
Bulk Export Accounts/Contacts	✗	✓	✓
Bulk Export Opportunities/Leads	✗	✓	✓
Print Opportunities/Leads into PDF	✓	✓	✓
Bulk Import Opportunites/Leads/Accounts/Contacts	✓	✓	✓
Bulk Edits Opportunites/Leads/Accounts/Contacts	✗	✓	✓
Merge Contact & Accounts	✗	✓	✓
SALES ENABLEMENT			
Automatic Sync	✓	✓	✓
Multiple Currencies	✗	✓	✓
Reminders	✓	✓	✓
Custom Profile Views	✓	✓	✓
Opportunities and Leads Pipeline View	✓	✓	✓
Opportunities and Leads Archive View	✗	✓	✓
Tasks and Appointments Calendar View	✓	✓	✓
Opportunities, Leads, Accounts, Contacts and Activities List View	✓	✓	✓

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SALES ENABLEMENT			
Opportunities, Leads, Accounts and Contacts Compact View	✓	✓	✓
Leads, Accounts and Contacts Card View	✓	✓	✓
Accounts and Contacts Auto Profiling	✗	✓	✓
Accounts and Contacts Maps Geolocation	✓	✓	✓
Accounts Hierarchy	✗	✗	✓
Automatic Task Scheduling	✗	✓	✓
Appointment Timezone Checker	✗	✓	✓
Recurring Tasks	✗	✓	✓
Activities 1-to-Many to Any	✗	✓	✓
Visual Opportunities and Leads Buying Center	✗	✗	✓
Visual Accounts and Contacts Org Chart	✗	✗	✓
Dynamic Velocity View	✓	✓	✓
Opportunities Bubble Chart View	✗	✗	✓
Tasks Board View	✗	✓	✓
Dynamic Target Views	✓	✓	✓
Target Multiple KPIs	✓	✓	✓
Navigator	✗	✓	✓
COMMUNICATION			
Email Integration	✓	✓	✓
Calling Integration (over Mobile)	✓	✓	✓
Mobile Apps (iOS and Android)	✓	✓	✓
CUSTOMIZATION			
Custom Pipelines	✗	Unlimited	Unlimited
Custom Pipeline Stages	✓	✓	✓
Custom Standard Fields for Opportunity, Lead, Account and Contact Form	✓	✓	✓
Custom Field Description	✓	✓	✓
Custom Products and Services Catalog	✓	✓	✓
Custom Fields per Pipeline Stages (Sales Actions)	✗	✓	✓
Custom Activities per Pipeline Stages (Sales Activities)	✗	✓	✓
Custom Activity and Account Types	✓	✓	✓
Custom Accounts Relations	✗	✓	✓
Custom Web Resource Fields	✓	✓	✓
Custom Automated Fields Calculation	✓	✓	✓
Custom Validation Rules	✓	✓	✓
Custom Multiple Pick-Lists	✓	✓	✓
Custom Dynamic Dropdowns	✓	✓	✓
Custom Auto-Number Fields	✓	✓	✓

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REPORTING AND ANALYTICS			
Standard Reports	✓	✓	✓
Insights	✗	✓	✓
Dashboards	✗	✓	✓
Forecasts	✗	✗	✓
Advanced Reports	✗	✗	✓
MICROSOFT SUITE			
Exchange Emails Sync	✓	✓	✓
Outlook.com Emails Sync	✓	✓	✓
Outlook Contacts Sync	✓	✓	✓
Outlook Tasks Sync	✓	✓	✓
Outlook Appointments Sync	✓	✓	✓
Outlook Inbox Add-In	✓	✓	✓
Word Templates	✓	✓	✓
Excel Templates	✓	✓	✓
SharePoint Integration	✗	✗	✓
OneDrive Integration	✗	✓	✓
OneDrive for Business Integration	✗	✗	✓
GOOGLE SUITE			
Gmail Emails Sync	✓	✓	✓
Chrome Extension: Web Clipper	✓	✓	✓
G+ Social Media Profiles	✓	✓	✓
Gmail Contacts Sync	✓	✓	✓
Gmail Tasks Sync	✓	✓	✓
Gmail Calendar Sync	✓	✓	✓
Drive Integration	✓	✓	✓
Chrome Extension: Gmail Inbox App	✓	✓	✓
Sheets Add-On for Submission Forms	✓	✓	✓
Sheets Add-On for Documents Templates	✓	✓	✓
Docs Add-On for Documents Templates	✓	✓	✓
OTHER INTEGRATIONS			
Dropbox	✓	✓	✓
Box	✓	✓	✓
Twitter	✓	✓	✓
Facebook	✓	✓	✓
Public Apps and Integrations	✓	✓	✓
Custom Integration	Upon Request	Upon Request	Upon Request
API Actions Limits	✗	50K Actions/month	150K Actions/month

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SECURITY AND ACCESS			
SSL Encryption	✓	✓	✓
History Logs	✓	✓	✓
Custom Roles & Permissions	✗	✗	✓
Custom Units	✗	✓	✓
Attachment Limits	30 MB	30 MB	30 MB
Sandbox Environment	✗	✗	✓
SUPPORT			
Full Knowledge Base	✓	✓	✓
Email Support	8x5	8x5	8x5
Online Chat Support	16x5	16x5	18x5 dedicated with response time
Data Import	Upon Request	Upon Request	✓
Onboarding Training	Upon Request	Upon Request	Upon Request
Call Support	✗	✗	✓
Assigned Account Manager	✗	✗	✓
Back-up: (script executed on demand)	Daily	Daily	
Product Feedback	✗	✗	✓
Pipeliner Quarterly Review	✗	✗	✓

Business Plans Comparison – Last Update: May 2017